

Wales Occupancy Survey

2011 Annual Report



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Executive Summary

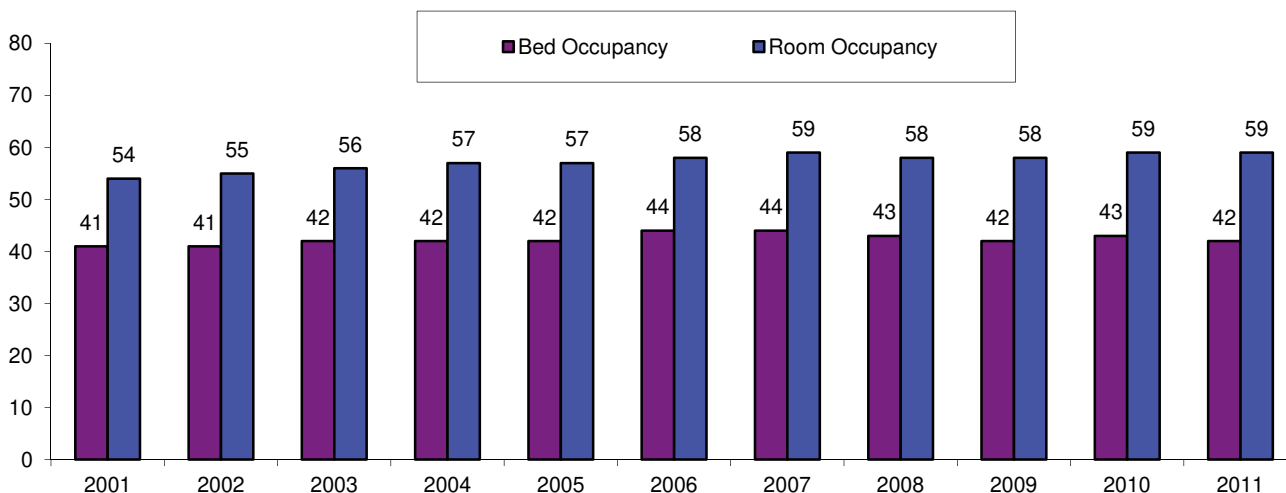
An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to include all serviced accommodation including guest houses and bed and breakfast establishments, as well as non-graded serviced accommodation.

The self catering survey has been conducted in varying formats since 1987. Since 2003 however, the methodology and software used to analyse the data has been consistent. The survey covers self catering accommodation, caravan holiday homes, touring caravan and camping parks. In addition, in 2008, hostels and bunk houses were also included within the coverage of the survey.

Hotels

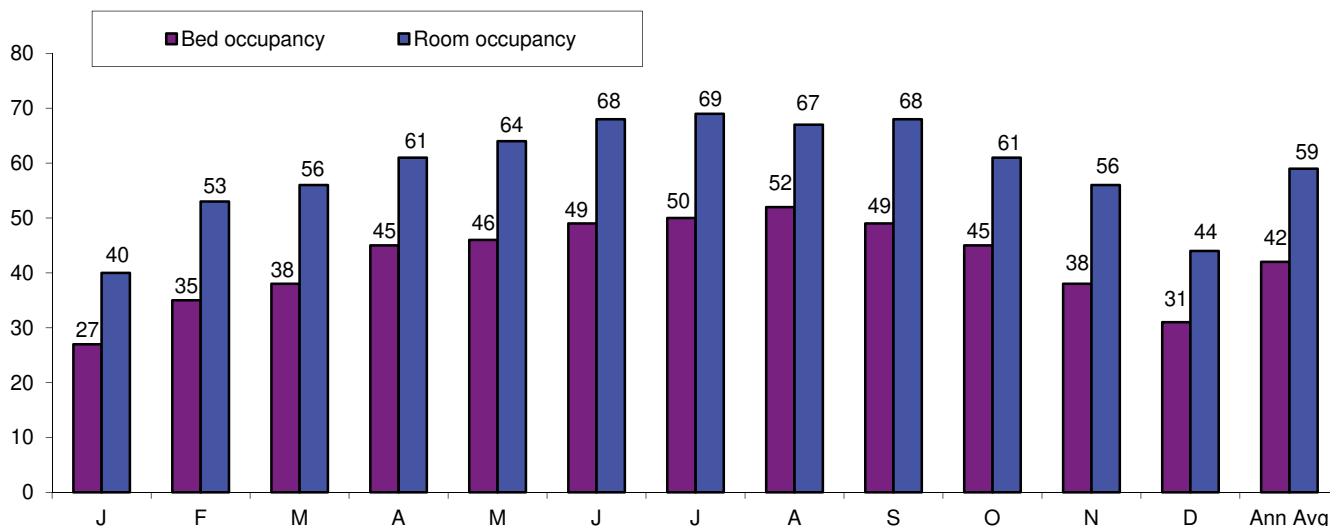
The annual average bed and room occupancy rates in 2011 were 42% and 59% respectively. The figure of 42% represents a slight decrease of one percentage point on the annual average bed occupancy rate recorded in 2010 (43%) while the annual average room occupancy rate remained at the same level as in 2010.

Figure 1-1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2011 are presented in Figure 1-1 overleaf.

Figure 1-2 - Hotels - Monthly Bed & Room Occupancy – 2011 (%)

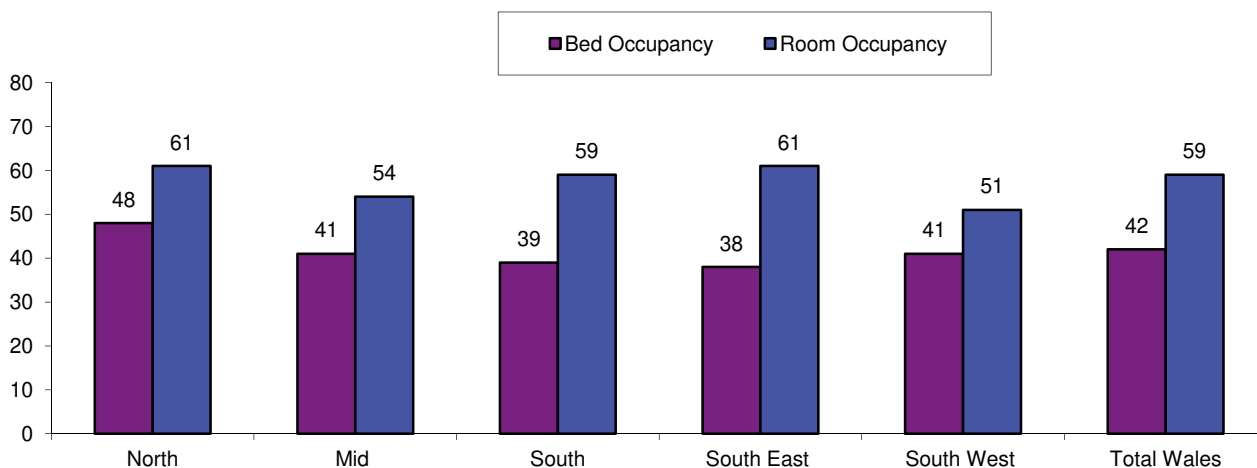


As in previous years, occupancy rates reported in 2011 continued to reflect the seasonality of the hotel sector. The average bed occupancy rate began at 27% in January 2011 before rising to a peak of 52% in August and decreasing to 31% in December. Likewise, the average room occupancy rate was higher during the summer months, with rates of 67% to 69% recorded between June and September, with the lowest rates recorded in January and December (40% and 44% respectively).

Regional Occupancy Rates

Figure 1-3 below presents the annual average bed and room occupancy rates for each region of Wales.

Figure 1-3 - Hotels - Annual Average by Regions of Wales – 2011 (%)



In 2011, both the Mid and South East regions recorded annual average bed occupancy rates of 41%, while the annual average bed occupancy rate for the South East was 38% and for North Wales was 48%. Unlike previous years, South East Wales recorded the lowest bed occupancy rate, which at 38% is four percentage points lower than that recorded for this region in 2010 (42%).

As in previous years, there was greater variation between the regions when analysed by their annual average room occupancy rate. Establishments located in the North and South East recorded annual

averages of 61% each, while establishments in the South West recorded an annual average of 51% and those in Mid Wales the lowest annual average of 54%.

Percentage of Overseas Guests

As would be expected, overseas occupancy was highest during the main tourist season. An average of 5%-7% was recorded between May and September 2011, with a peak of 7% in July 2011. The lowest percentage recorded throughout the year was in December at 3%, while the annual average proportion of overseas guests was 5%. The largest increase in the percentage of overseas guests was recorded in January 2011 (6% compared to 4% in January 2010), while rates were lower in October (4%) and November (4%) 2011 when compared with the same months in 2010 (6% and 5% respectively).

Percentage of Business Guests

As in previous years, the percentage of business guests was highest at the start and end of the year, a converse trend to that for overall occupancy rates, but one that is well-established for UK destinations. The proportion of business guests recorded in January 2011 was 29%, a rate which decreased to its lowest point in April and August 2011 (9%) before increasing to 21% in November, with a decrease to 14% in December. The April and December figures are likely to have been influenced by increased leisure use during these months reflecting the timing of Easter and the Royal Wedding in April and the Christmas Holiday period in December.

2011 began with a strong start in terms of business occupancy with a seven percentage point increase recorded in January compared to the same month in 2010 (22% to 29%). The largest decrease was recorded in December 2011 where a rate of 14% was recorded compared to a rate of 20% for the same month in 2010.

Occupancy by Size of Hotel

In previous years, a positive correlation has been recorded in terms of size, measured by the number of bedrooms and bed occupancy rates, a trend less evident in 2011 with occupancy rates in the range 41% - 44% being recorded across the various size categories. However, the data does demonstrate a general correlation between hotel size and room occupancy rates. Hotels with between 51 and 100 rooms recorded an annual average bed occupancy rate of 65% and those with over 100 rooms a rate of 63% compared to 52% amongst those with 4 to 10 rooms.

As reported previously, there are a number of factors which could have contributed to this positive correlation. Larger hotels tend to be open all year and are more likely to actively market their establishments. Also, many of these are located in cities and large towns, making them more likely to have business guests occupying single rooms on weekdays.

Between 2010 and 2011, it was establishments with between 4 and 10 rooms that recorded the greatest increase in their average room occupancy, with the 2011 rate of 52% seven percentage points higher than the 2010 rate of 45% and the highest recorded for these establishments since 2001.

Occupancy by Tariff

Overall, a positive relationship between the tariff charged¹ and occupancy levels for hotels was again recorded in 2011. Establishments charging £50-£59.99 recorded the highest annual average bed occupancy rate (47%), however at 42%, the rate for hotels charging £60 or more was ten percentage points higher than the rate recorded by those charging £30-£39.99. When analysed by room occupancy a clear correlation was evident, with a rate of 60% recorded by hotels charging £50-£59.99 and those charging £60 or more compared to 46% for establishments charging £30-£39.99. It is likely that hotels in the highest tariff bands attracted a greater proportion of business guests making use of single occupancy rooms.

For most of the tariff bands, the annual average room occupancy rate recorded was similar to that recorded in 2010. The largest increase was four percentage points for those charging £40-£49.99 which brought the annual average room occupancy rate for these establishments to 59%, the highest recorded since 2003.

Occupancy by Location

Occupancy rates were analysed according to the location of the hotel - in a city/large town, a small town, at the seaside or in the countryside/village.

As in previous years, establishments located in cities and large towns recorded the highest annual average room occupancy rate in 2011 (62%). Unlike previous years, however, it was establishments in seaside areas that recorded the highest annual average bed occupancy rate of 45%. The lowest annual average bed occupancy rate was recorded for hotels in small towns (38%), while the lowest annual average room occupancy rate was recorded for hotels in countryside/village locations (55%). In 2011, the largest differentials between annual average bed and room occupancy rates were recorded for establishments in small towns, a difference of twenty-two percentage points and in cities/large towns (twenty-one percentage points).

Following a period of stability between 2006 and 2008, the annual average room occupancy rate for hotels in cities/large towns has decreased year-on-year since 2008, with the decrease of four percentage points in 2011 meaning that this rate (62%) is the lowest recorded since 2001. The annual average rate for countryside/village locations rose from 53% to 55%, while the rates for those in small towns and seaside areas were similar in 2011 to those recorded in 2010 with a decrease of one percentage point and an increase of one percentage point respectively over this time period.

Occupancy by Grading

Since 1999, occupancy rates for hotels have been analysed according to their grading under the Star Grading Scheme administered by Visit Wales (formerly Wales Tourist Board).

Within the Visit Wales grading scheme, hotels with the highest star grading recorded the highest annual averages, with rates of 57% and 73% for bed and room occupancy respectively. Between 2010 and 2011, increases of five and six percentage points respectively were recorded for those with a 2 and 5 stars grading, while those with 4 stars recorded a decrease from 64% in 2010 to 60% in 2011. The

¹ The tariff figures used in the survey relate to the amount charged per person for a double or twin room, including breakfast.

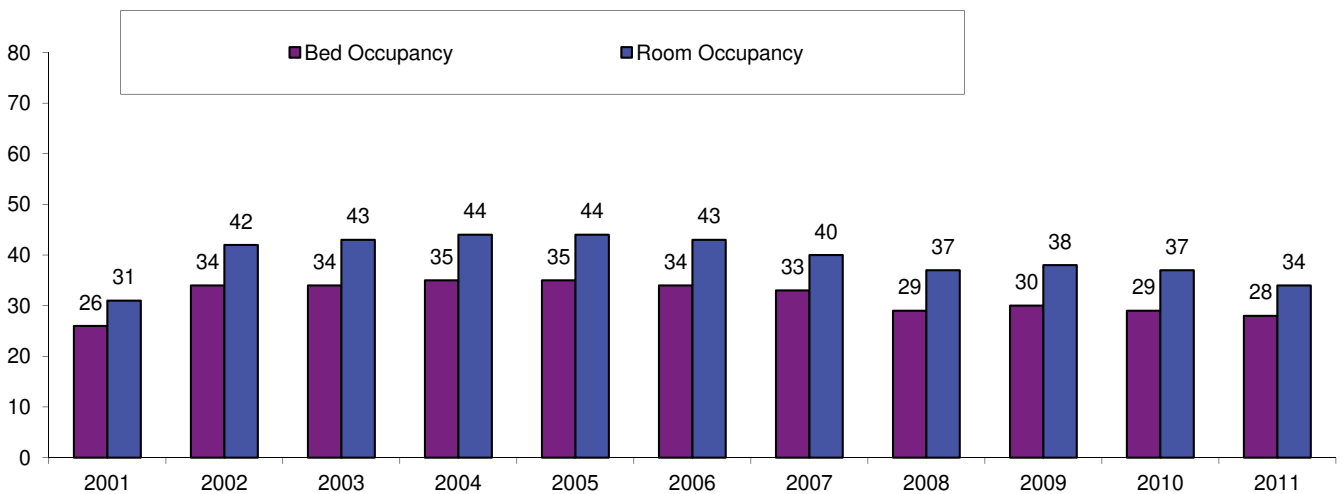
annual average room occupancy rate for ungraded establishments rose from 52% in 2010 to 54% in 2011.

Guest Houses and Bed and Breakfasts

Annual Average Bed and Room Occupancy

Overall occupancy rates for Guest Houses and Bed and Breakfasts have still to recover from the effects of the economic recession. The annual average bed occupancy rate decreased by one percentage point in 2011 to 28%, while the annual average room occupancy rate decreased by three percentage points to 34%. These are the lowest occupancy rates recorded over the past ten years.

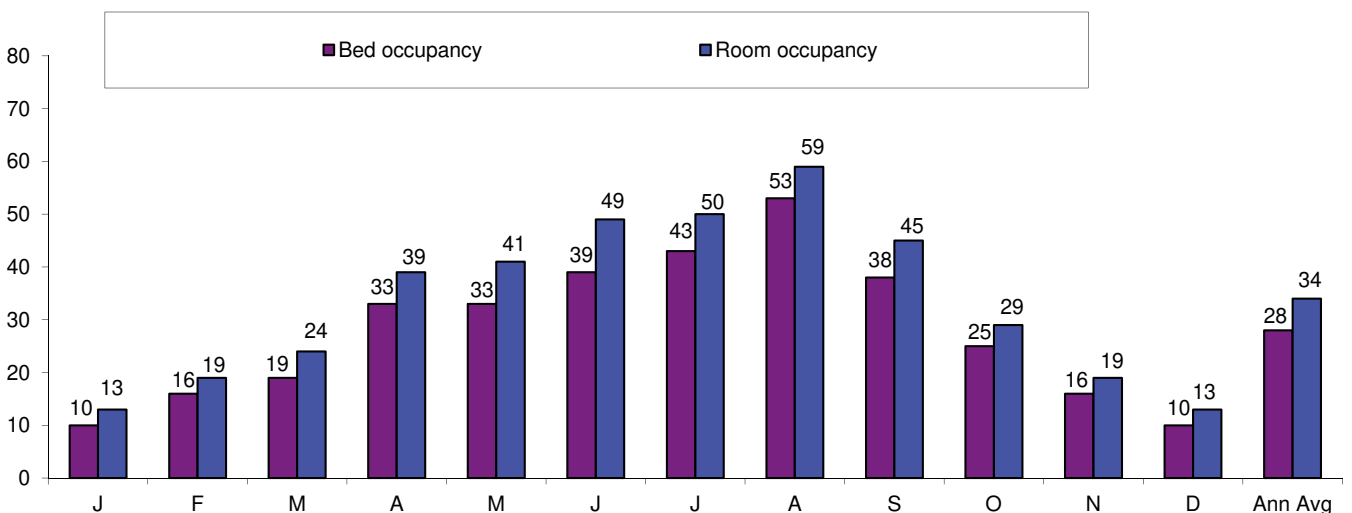
Figure 1-4 - Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the guest house and bed and breakfast sector in 2011 are presented in Figure 1-5 below.

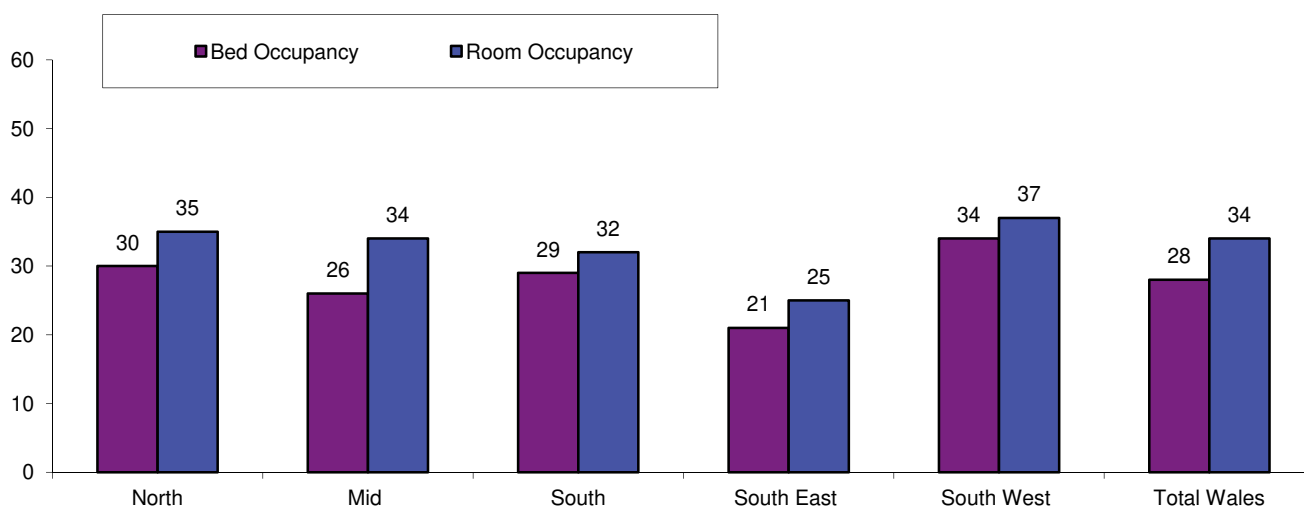
Figure 1-5 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2011 (%)



As in previous years, the seasonal nature of this sector is evident with average bed occupancy rates at their highest for guest houses and bed and breakfasts during the main tourist season (May to September). Bed occupancy levels varied from 10% in January to a peak of 53% in August before decreasing to 10% in December. Room occupancy levels followed a similar pattern climbing from 13% in January to 59% in August before decreasing to 13% in December 2011.

Regional Occupancy Rates

Figure 1-6 - Guest Houses/B&Bs - Annual Average by Regions of Wales – 2011 (%)



The annual average bed and room occupancy rates were highest for the South West region in 2011 (34% and 37% respectively). Establishments in North Wales recorded an annual average bed occupancy rate of 30% while lower rates were recorded by those in the South East (21%) and Mid Wales (26%). The annual average room occupancy rate for establishments in South East Wales was 25%, a lower proportion than was recorded for each of the other three regions.

The annual average room occupancy rate for establishments in Mid Wales was two percentage points higher in 2011 than in 2010 (34% and 32% respectively), while the rate for North Wales decreased by four percentage points (to 35%) and the rate for South West Wales fell by two percentage points over the same period. The annual average room occupancy rate for South East Wales was thirteen percentage points lower than in 2010 and is the lowest rate recorded since 2001. It should be borne in mind that the sample size for the South East region for business occupancy is low and that not all of those who supply business occupancy data did so for every month, therefore, results should be treated with caution.

Percentage of Overseas Guests

In 2008, there was been a minor change in the way that data is collected for overseas guests in that the forms used to collect occupancy data were updated to make them more focussed and efficient. One of the changes affected the way in which information on overseas guests was collected. In previous years, establishments were asked to provide information on the number of new arrivals for each day (both UK and overseas) and the percentage of overseas guests, based on the total number of arrivals, was presented. This information is now not collected, so consequently, the proportion of overseas stays is presented as a percentage of overseas bed nights (based on total bed nights).

While the annual averages for overseas guests were similar in 2010 and 2011 (12% and 11% respectively), monthly rates were more variable. The largest differences were recorded in January and December 2011, where the percentage of overseas guests fell by five and thirteen percentage points respectively.

Occupancy by Size of Guest House/Bed & Breakfast

As reported previously for hotels, there would appear to be a positive relationship between occupancy rates and establishment size. Establishments with 4-10 rooms recorded annual average bed and room occupancy rates of 31% and 37% respectively compared to 23% and 27% respectively amongst those with 1-3 rooms. The higher occupancy amongst these establishments is likely to be the result of a number of factors including the fact that larger establishments are more likely to be open all year and they are also more likely to attract business guests.

The annual average room occupancy rate was lower for both establishments with 1-3 and 4-10 rooms in 2011 compared to the comparable rates for 2010. The rates for both size bands were similar to those recorded in 2001.

Occupancy by Tariff

While in previous years there has appeared to be a positive correlation between tariff and occupancy levels, tariff appeared to have less of an influence on occupancy in 2011. The annual average bed occupancy rate for establishments charging £30 or more was in the range 29%-30% in 2011, while the annual average room occupancy rate was between 34% and 35%.

Between 2010 and 2011, a four percentage point decrease was recorded in the annual average room occupancy rate for those charging £20-£29.99, while the rate for those charging £30-£39.99 decreased from by two percentage points and for those charging £40-£49.99 by three percentage points over the same period of time. The largest decrease was for establishments charging £60 and over (twenty percentage points), although the sample size for these establishments is small, therefore, variations should be treated with caution.

Occupancy by Location

As in 2010, annual average bed and room occupancy rates were highest in seaside areas in 2011 (35% and 42% respectively) but were followed by small towns (33% and 44% respectively) in 2011. The annual average room occupancy rate for establishments in small towns increased by seven percentage points in 2011 to 44%, the highest rate recorded for these establishments over the past ten years. Those establishments in seaside areas recorded a decrease of four percentage points between 2010 and 2011 (46% to 42%), as did those in countryside/village areas (34% to 30%).

Occupancy by Grading

There was generally a positive correlation between occupancy level and grade, with ungraded establishments recording the lowest annual average bed and room occupancy rates of 18% and 24% percentage points respectively. Establishments with a 5 star grading recorded a lower annual average bed occupancy rate than those with 4 stars (30% and 33% respectively), with only a very slight difference recorded in the annual average room occupancy rates for these grading categories in 2011 (36% and 35% respectively).

Between 2010 and 2011, the largest decrease was recorded for establishments with a 5 star grading (43% in 2010 to 35% in 2011), the lowest rate recorded since 2008. Four star establishments recorded a decrease of three percentage points over this time period, while the rate for 3 star establishments fell from 36% to 31%. Ungraded establishments recorded the smallest decrease of two percentage points in their annual average room occupancy rate between 2010 and 2011.

All Accommodation

The annual average bed for all serviced accommodation has remained consistent at 38% for the past four years. Likewise, the annual average bed occupancy rate has been at 52% for the past four years.

Seasonality is again evident in the monthly occupancy rates for all serviced accommodation. Between May and September, the average bed occupancy rate was in the range 42% - 53%, while the average room occupancy rate was in the range 58% - 65% during the same period. The impacts of the Easter Holiday period and Royal Wedding are clear, with an increase of eight percentage points in the average bed and room occupancy rates between March and April 2011.

The annual average percentage of overseas guests has remained at 7% for the past four years. There has been some variation when analysed by individual months over the past four years, particularly outside of the main tourist season.

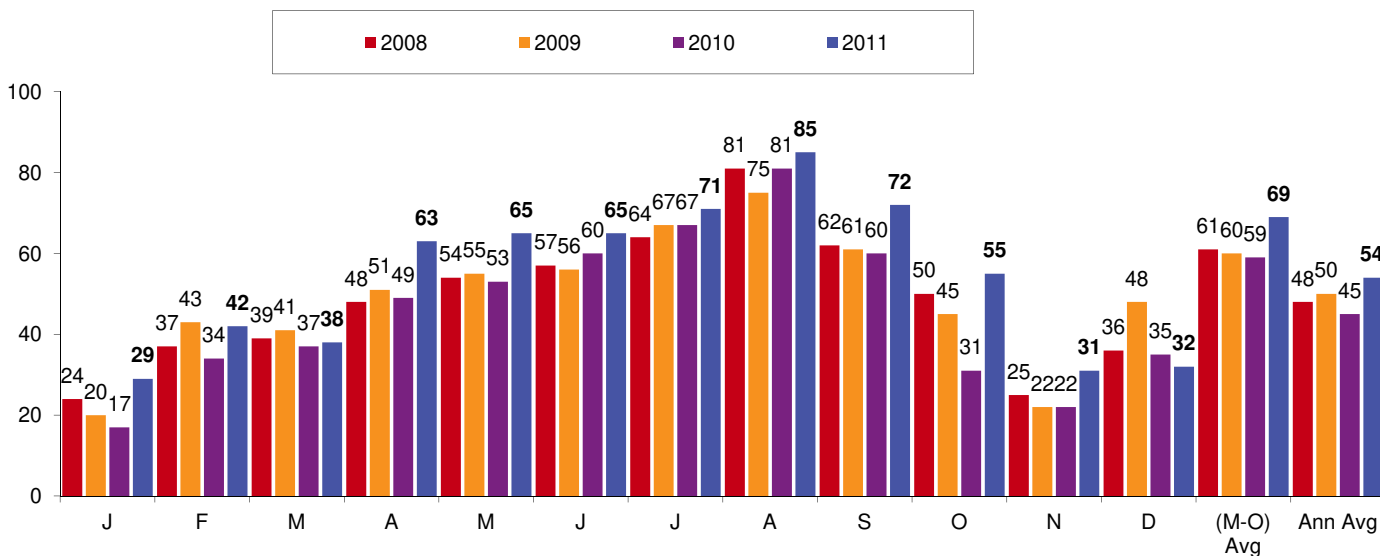
Self catering Accommodation

Cottages and Apartments

Monthly Unit Occupancy

Figure 1-7 below presents annual occupancy rates for 2008 to 2011 across both independent and agency operators.

Figure 1-7- Monthly Unit Occupancy – Cottages and Apartments ALL (%)



The monthly unit occupancy rate for all properties in 2011, as in previous years, varies considerably throughout the year, reflecting the seasonal nature of this sector. The January 2011 monthly unit occupancy rate was 29%, a figure which increased to 85% in August before falling to 31% in November

and 32% in December. Between March and April 2011, this monthly rate increased by twenty-five percentage points, reflecting the impact of the Easter Holiday period and an additional Bank Holiday due to the Royal Wedding. The annual average for all properties in 2011 was 54%.

Table 1-1 - Monthly Unit Occupancy – Cottages and Apartments - Independent (%)

	Average Unit Occupancy				
	2007	2008	2009	2010	2011
January	22	23	24	22	24
February	40	40	39	34	39
March	43	43	37	36	32
April	54	48	55	56	62
May	69	61	62	58	60
June	76	67	70	67	59
July	86	76	80	73	69
August	93	87	88	86	87
September	73	69	72	67	69
October	60	52	55	49	48
November	32	26	27	27	25
December	39	42	36	34	30
<i>May – October average</i>	<i>76</i>	<i>69</i>	<i>71</i>	<i>67</i>	<i>65</i>
<i>Annual average</i>	<i>57</i>	<i>53</i>	<i>54</i>	<i>51</i>	<i>50</i>

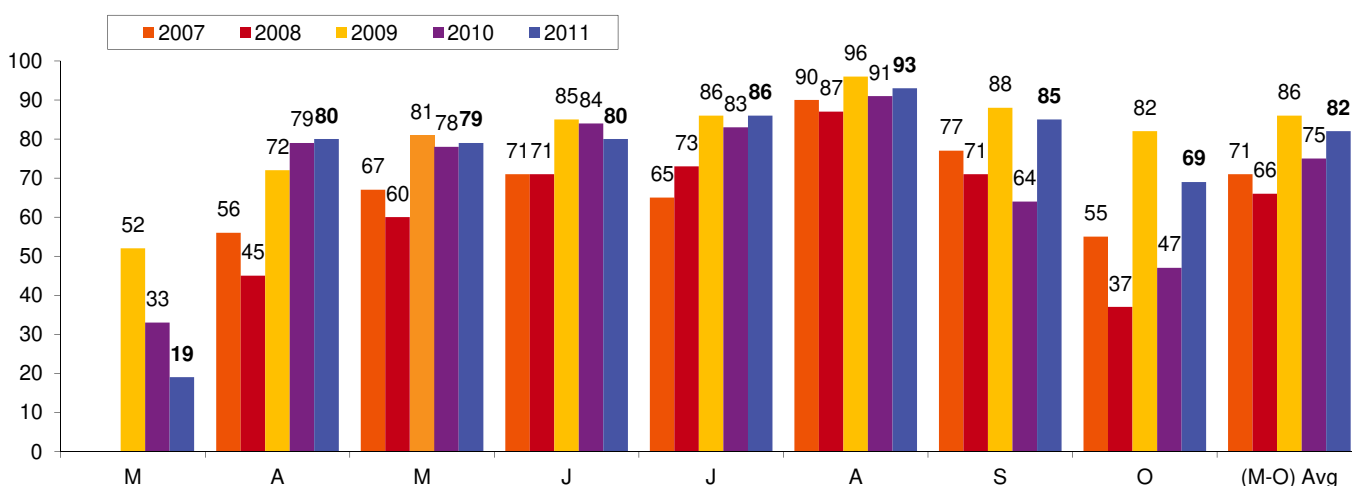
The average unit occupancy rate for independent operators in 2011 was 50%, a slight decrease on the 2010 rate of 51% and the lowest recorded for this category of operators since 2007. The May to October average also fell slightly from 67% in 2010 to 65% in 2011, again the lowest rate recorded during the past four years. When analysed by month, the largest decreases between 2010 and 2011 were recorded for the months of March (four percentage points), June (eight percentage points) and July (four percentage points). However, the year did start more positively than in 2010, with rates for January and February (24% and 39% respectively) higher than those recorded for the same months in 2010 (22% and 34% respectively). This may have been due to improved weather conditions at the start of 2011 compared to early 2010.

Table 1-2 - Monthly Unit Occupancy – Cottages and Apartments - Agency (%)

	Average Unit Occupancy			
	2008	2009	2010	2011
January	24	16	13	34
February	36	45	35	46
March	35	44	39	44
April	47	49	44	64
May	51	52	49	69
June	51	43	56	70
July	59	54	64	73
August	78	63	78	84
September	58	51	56	75
October	44	36	21	62
November	23	17	20	40
December	29	57	38	34
<i>May – October average</i>	<i>57</i>	<i>50</i>	<i>54</i>	<i>72</i>
<i>Annual average</i>	<i>45</i>	<i>44</i>	<i>43</i>	<i>58</i>

In 2011, the monthly unit occupancy rate for properties let by an agent ranged from 34% in January to 84% in August to 34% in December. As with independent operators, agency let properties recorded an increase between March and April 2011 (from 44% to 64%), reflecting the Easter Holiday period and the additional Bank Holiday. Improved weather conditions early in 2011 and changes in the sample² to an increase in the monthly average for January, which was twenty-one percentage points higher than the rate recorded for the same month in 2011.

Caravan Holiday Homes

Figure 1-8 - Monthly Unit Occupancy – Caravan Holiday Homes (%)

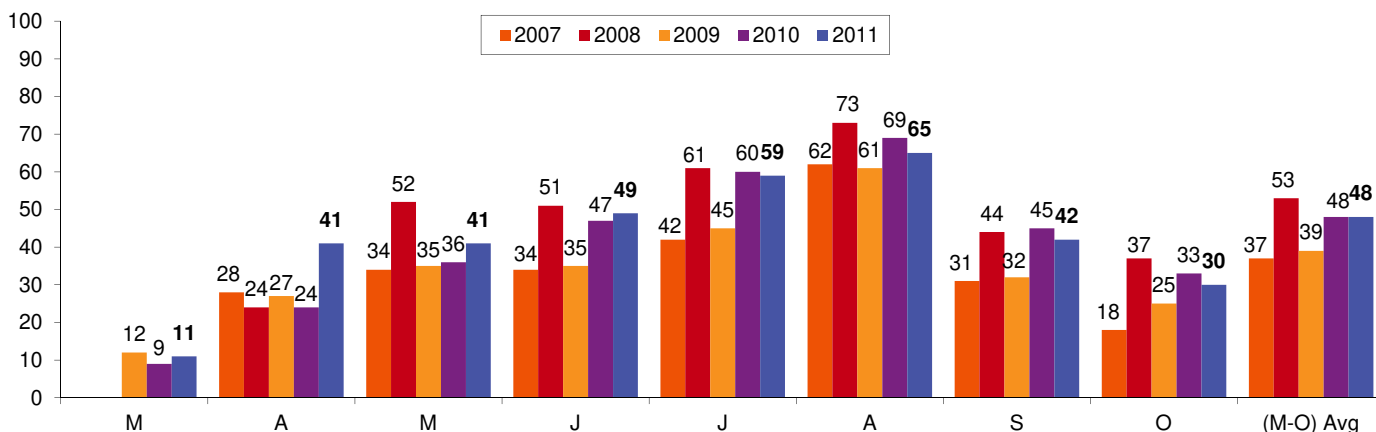
² It is important to note a smaller sample was obtained in 2011, primarily due to an operator with a large number of properties who returned data in 2010 but not for 2011.

Between March and April 2011, the monthly unit occupancy for caravan holiday homes increased by sixty-one percentage points, highlighting the importance of the Easter Holiday period to this accommodation sector, as well as the additional Bank Holiday due to the Royal Wedding. Also, it is likely that a greater number of sites opened in April to take advantage of the Easter Holiday period and Bank Holiday. Between May and September, average monthly unit occupancy rates ranged from 79% - 93%, with the highest rate recorded in August.

At 82%, the May to October average for 2011 was seven percentage points higher than the 2010 rate of 75% and is the second highest rate recorded for this period since 2007. When analysed by month, following a decrease of twenty-two percentage points in September 2010, the average unit occupancy rate for this month rose by twenty percentage points in 2011 to 84%. The 2011 rate for October (69%) was twenty-two percentage points higher than for the same month in 2010, with a larger number of operators returning forms for this month in 2011.

Touring Caravan and Camping Parks

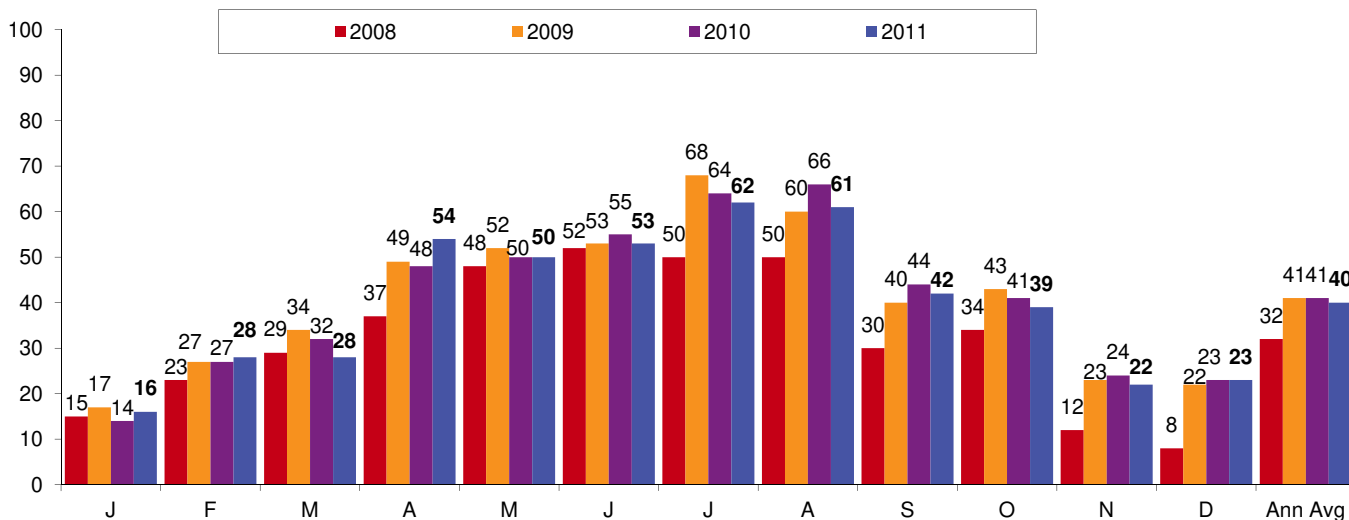
Figure 1-9 - Monthly Pitch Occupancy – Touring Caravan and Camping Parks (%)



Following a decrease in the May to October average between 2008 and 2009 (53% to 39%), an increase of nine percentage points was recorded in the 2010 average (48%), a rate which remained static in 2011. The relatively small sample sizes for this sector, along with possible survey variation between years, should be taken into account when comparing data.

Hostels and Bunkhouses

Figure 1-10 - Monthly Bed Occupancy – Hostels – (%)



The monthly bed occupancy rate was 16% in January 2011. This figure rose to a peak of 62% in July before decreasing to 22% in November and 23% in December. As for other accommodation sectors, the impact of the Easter Holiday break and the additional Bank Holiday in April were evident, with an increase of twenty-six percentage points in the monthly bed occupancy rate for hostels and bunkhouses between March and April 2011 (28% and 54% respectively). Towards the end of the main summer season the monthly average bed occupancy rate declined significantly, with a decrease of twenty-one percentage points between August (61%) and September (42%). The annual average for 2011 was 40%, a slight decrease on the 2009 and 2010 rates of 41%.

Introduction

An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to include all serviced accommodation including guest houses and bed and breakfast establishments, as well as non-graded serviced accommodation.

The self catering survey has been conducted in varying formats since 1987. Since 2003 however, the methodology and software used to analyse the data has been consistent. The survey covers self catering accommodation, caravan holiday homes, touring caravan and camping parks. In addition, in 2008, hostels and bunk houses were also included within the coverage of the survey.

Where available and appropriate, comparative figures from previous years are presented throughout the report. Sections 3 to 9 examine each of the accommodation sectors as follows:

- Section 3: Hotels
- Section 4: Guest houses and Bed and Breakfast establishments
- Section 5: All Serviced Accommodation
- Section 6: Self catering cottages and apartments
- Section 7: Caravan holiday homes
- Section 8: Touring caravan and camping parks
- Section 9: Hostels and bunkhouses.

Copies of the monthly forms completed by operators are presented in Appendix 5.

Hotels

Section 3 of the report presents the monthly and annual average bed and room occupancy levels for hotels. For details of the survey methodology, please refer to Section 2.

Sample Size

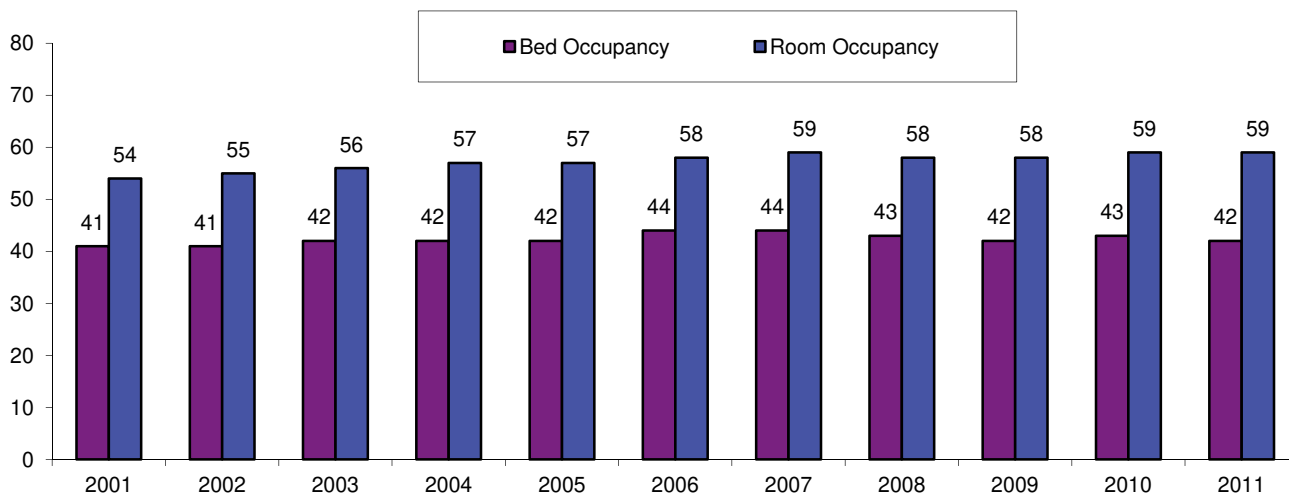
In 2011, a total of 133 hotels participated in the survey (i.e. provided at least one return during the year). To ensure that the results are comparable across the months, a great deal of effort was placed in trying to maintain the level of response each month and operators have been encouraged to provide a full response over the year. Over half (52%) of the operators who contributed to the survey provided data for every month of the year. A further 13% provided data for all but one month of the year.

During this period, 6 hotels were recruited to take part in the survey. However, in the same period 13 other establishments withdrew or were removed from the survey. Establishments were removed from the sample as they had not sent returns over a long period of time. There are a wide variety of reasons for establishments withdrawing from the survey: a change in ownership/management; operators being too busy to complete forms at peak times of the year; ill health; retirement; operators and establishments ceasing to trade as hotels. In addition to this, there is also 'respondent fatigue', whereby those who have participated in the survey for some time adopt the viewpoint that they have "*done their bit for the survey*". This can be particularly evident at the beginning of a new survey year.

Annual Average Bed and Room Occupancy

The annual average bed and room occupancy rates in 2011 were 42% and 59% respectively. This initial figure represents a slight decrease of one percentage point on the annual average bed occupancy rate recorded in 2010 (43%) while the annual average room occupancy rate remained at the same level. Annual average bed occupancy rates have been fairly consistent over the years, remaining in the range 41% - 45% since 2001, while the annual average room occupancy rate has been in the range 54% - 59% over the same period of time.

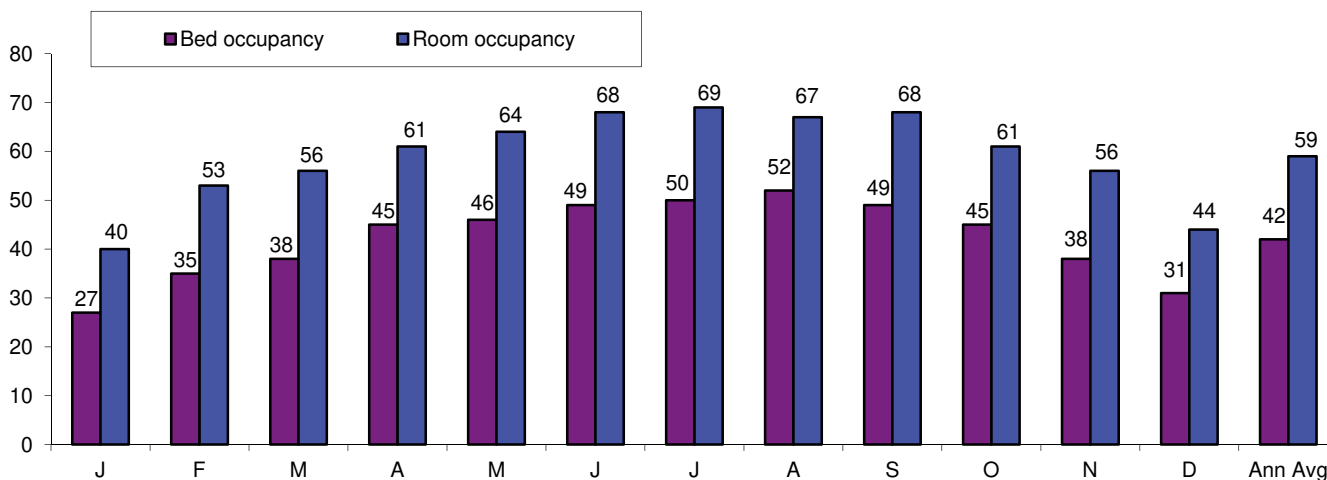
Figure 3-1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2011 are presented in Figure 3-2 below.

Figure 3-2 - Hotels - Monthly Bed & Room Occupancy – 2011 (%)



As in previous years, occupancy rates reported in 2011 continued to reflect the seasonality of the hotel sector. The average bed occupancy rate began at 27% in January 2011 before rising to a peak of 52% in

August and decreasing to 31% in December. Likewise, the average room occupancy rate was higher during the summer months, with rates of 67% to 69% recorded between June and September, with the lowest rates recorded in January and December (40% and 44% respectively).

Table 3-1 - Hotels - Trends in Room Occupancy Rates - Monthly Averages (%)

	Room occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
January	33	36	37	35	40	38	40	39	40	39	40
February	43	47	48	49	48	50	50	50	48	50	53
March	44	50	50	52	52	51	53	54	51	53	56
April	49	52	56	54	57	58	58	56	58	60	61
May	61	60	62	63	63	65	65	66	62	64	64
June	63	63	63	65	65	66	67	66	68	69	68
July	66	65	66	67	67	70	67	67	70	70	69
August	70	67	69	68	69	73	73	71	70	69	67
September	64	65	67	69	69	71	71	69	69	70	68
October	58	58	58	58	58	61	62	61	63	63	61
November	53	50	50	52	50	53	55	54	54	54	56
December	43	42	43	45	43	44	47	45	47	42	44
<i>Annual Average</i>	<i>54</i>	<i>55</i>	<i>56</i>	<i>57</i>	<i>57</i>	<i>58</i>	<i>59</i>	<i>58</i>	<i>58</i>	<i>59</i>	<i>59</i>

The average room occupancy rates recorded during 2011 were similar or higher than in 2010 during the spring and winter months, particularly in February (53% and 50% respectively) and March (56% and 53% respectively). However, results for the main summer season and autumn months were slightly lower in 2011 than in the previous year, with decreases of two percentage points recorded in the average room occupancy rates for August, September and October. As shown later, business occupancy rates tend to be higher outside of the main summer season, which suggests that business guests contributed to higher room occupancy rates outside the main summer season in 2011 for this sector.

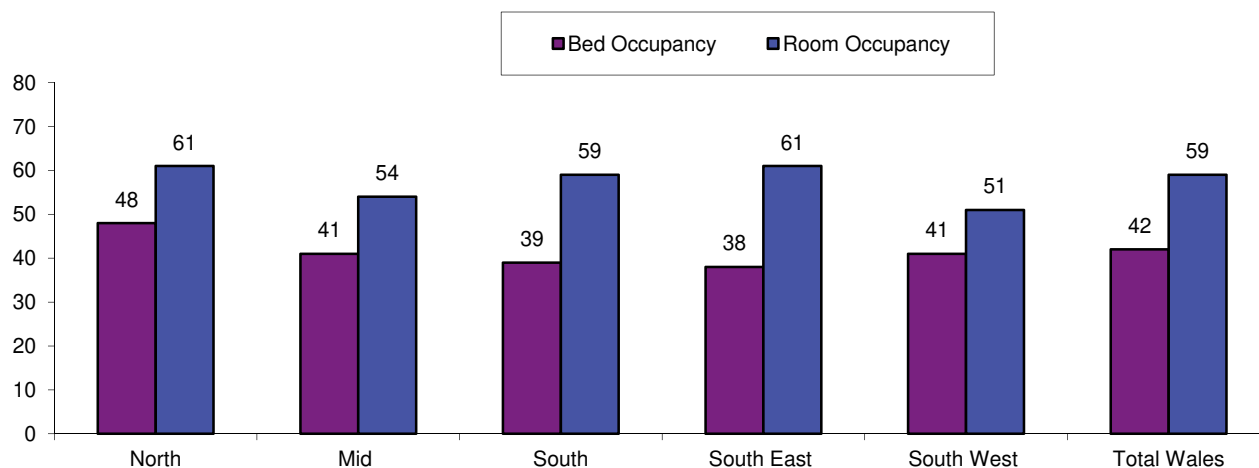
Overall, it is the months of January to April that have shown the greatest increase in average room occupancy rates between 2001 and 2011, with increases of between seven and twelve percentage points recorded for these months over this time period.

Trends in monthly bed occupancy rates since 2001 are presented in Appendix 1a.

Regional Occupancy Rates

Figure 3-3 below presents the annual average bed and room occupancy rates for each region of Wales. The results for South Wales are also presented separately from the South East and South West regions.

Figure 3-3 - Hotels - Annual Average by Regions of Wales – 2011 (%)



In 2011, both the Mid and South East regions recorded annual average bed occupancy rates of 41%, while the annual average bed occupancy rate for the South East was 38% and for North Wales was 48%. Unlike previous years, South East Wales recorded the lowest bed occupancy rate, which at 38% is four percentage points lower than that recorded for this region in 2010 (42%).

As in previous years, there was greater variation between the regions when analysed by their annual average room occupancy rate. Establishments located in the North and South East recorded annual averages of 61% each, while establishments in the South West recorded an annual average of 51% and those in Mid Wales the lowest annual average of 54%.

Average bed and room occupancy levels for each region on a monthly basis for 2011 are presented in Appendix 1b and 1c. Please note that due to the small sample size in some areas, this information is not always available.

Trends in Regional Occupancy Rates

Room occupancy rates in the regions of Wales since 2001 are presented in Table 3-2.

While establishments located in Mid Wales recorded one of the lowest annual average room rates in 2011 relative to the other regions, this rate was five percentage points higher than the rate recorded for this region in 2010 (49%) and the highest recorded since 2001. Establishments located in the South West recorded the lowest annual average room occupancy rate in 2011, which at 51% is three percentage points lower than the 2010 rate for this region. The annual average room occupancy rate for North Wales remained equal to that in 2010 (61%) and this remains one of the highest rates recorded for this region over the past ten years. Establishments in South East Wales recorded a decrease of one percentage point in their annual average room occupancy rate between 2010 and 2011 (62% and 61% respectively).

Table 3-2 - Hotels - Trends in Room Occupancy Rates by Regions of Wales (%)

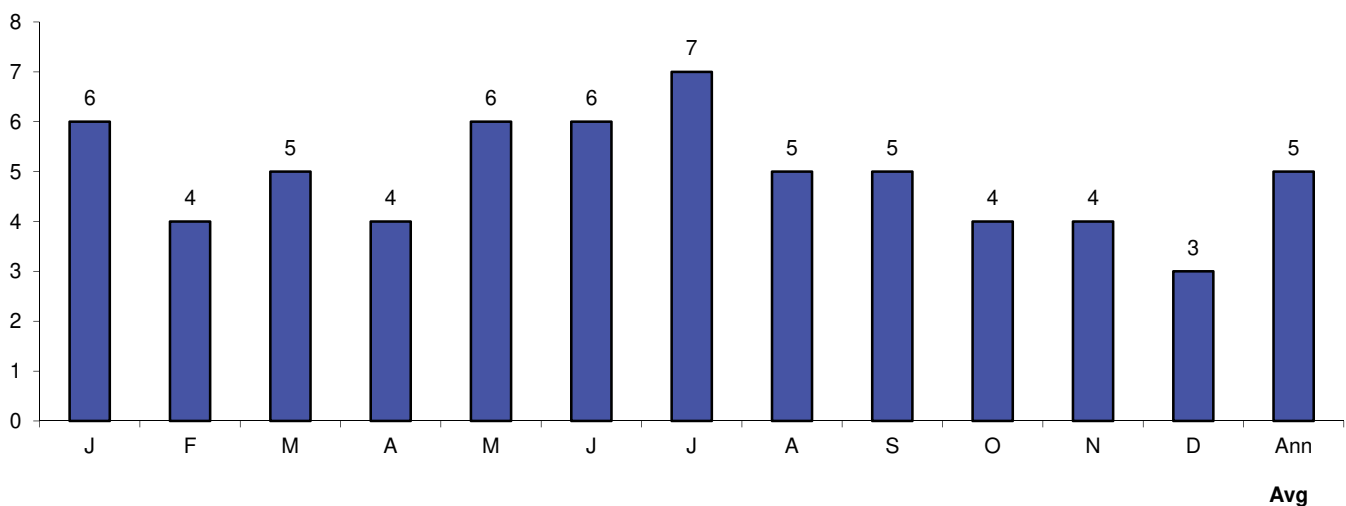
	Annual Average Room Occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
North Wales	53	52	53	54	54	57	59	57	62	61	61
Mid Wales	44	49	51	52	52	53	53	50	49	49	54
South Wales	58	58	59	60	60	61	61	62	59	60	59
South East	61	60	62	63	60	63	63	66	62	62	61
Wales											
South West	53	56	54	55	59	58	58	56	53	54	51
Wales											
TOTAL WALES	54	55	56	57	57	58	59	58	58	59	59

Percentage of Overseas Guests

As detailed in last year's report, the forms used to collect occupancy data were updated in 2008 to make them more focussed and efficient. One of the changes affected the way in which information on overseas guests is collected. In previous years, establishments were asked to provide information on the number of new arrivals for each day (both UK and overseas) and the percentage of overseas guests based on the total number of arrivals was presented. This information is now not collected, so consequently, we have presented the proportion of overseas stays as a percentage of bed nights (based on total bed nights).

It is important to highlight that the variation between the different methods of collecting overseas data is a matter of a few decimal places. As an example, the annual 2007 percentage was 4.0% using the old method and 4.1% using the new approach.

In light of these changes, and to ensure consistency that overseas figures across years are compared based on the same methodological process, the amount of trended information presented for overseas guests has been reduced and the focus in this report on the latest 2008 to 2011 results.

Figure 3-4 - Hotels - Percentage of Overseas Bednights 2011 (%)

As would be expected, overseas occupancy was highest during the main tourist season. An average of 5%-7% was recorded between May and September 2011, with a peak of 7% in July 2011. The lowest percentage recorded throughout the year was in December at 3%, while the annual average proportion of overseas guests was 5%.

Trends in Percentage of Overseas Guests

As illustrated in Figure 3-5 overleaf, the annual percentage of overseas guests recorded has remained at 5% each year from 2008 to 2011

Monthly overseas occupancy rates have been variable over the last three years, however, given the relatively small proportions recorded, these have not been particularly sizeable variations. The largest increase was recorded in January 2011, with this rate rising by two percentage points to 6% from the rate recorded for this month in 2010 (4%). Overseas occupancy rates were lower in October (4%) and November (4%) 2011 when compared with the same months in 2010 (6% and 5% respectively).

Figure 3-5 - Hotels - Trends in Percentage of Overseas Guests (%)

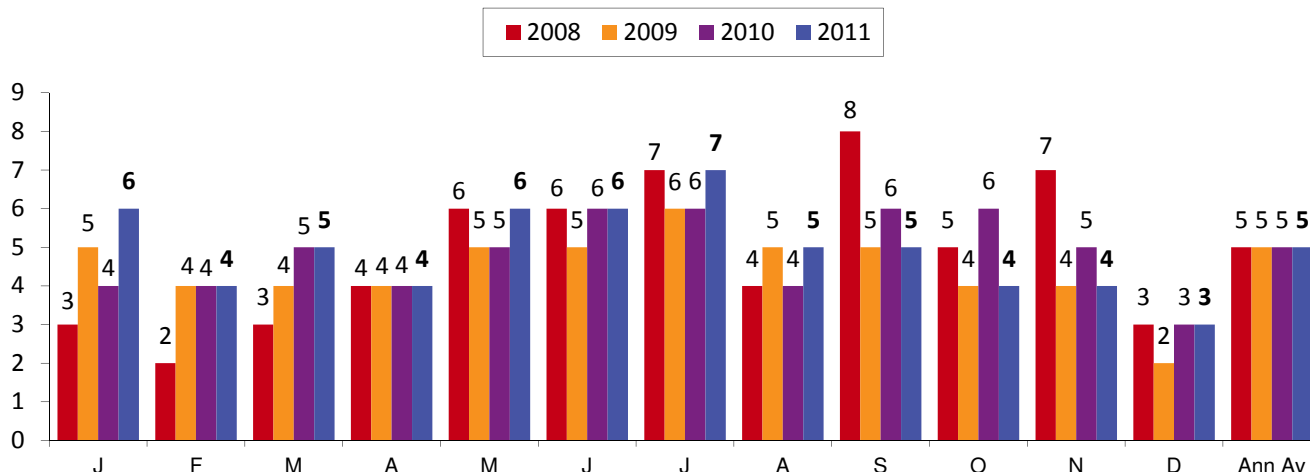
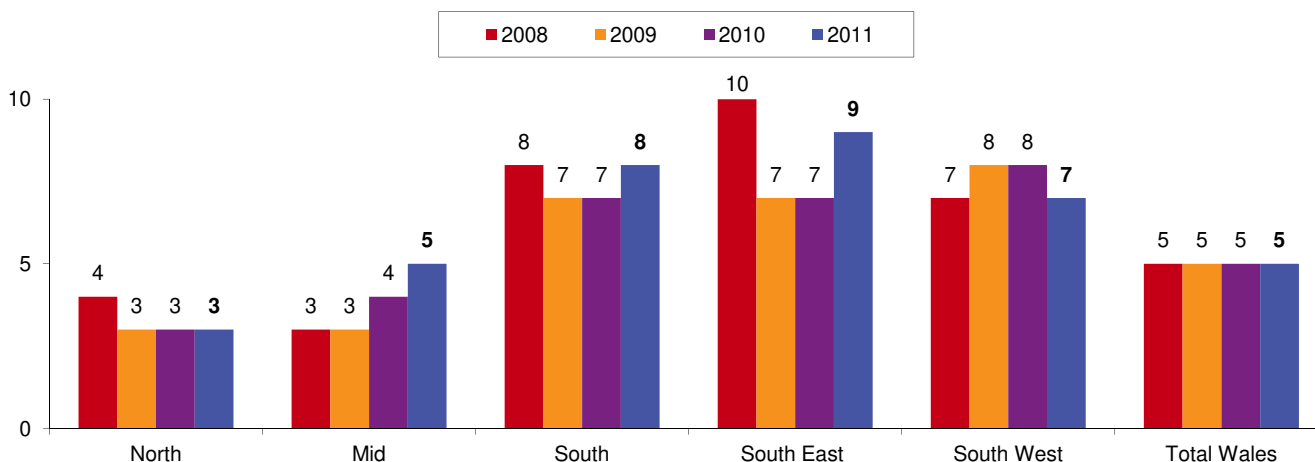


Figure 3-6 - Hotels - Percentage of Overseas Guests by Region 2008 – 2011 (%)

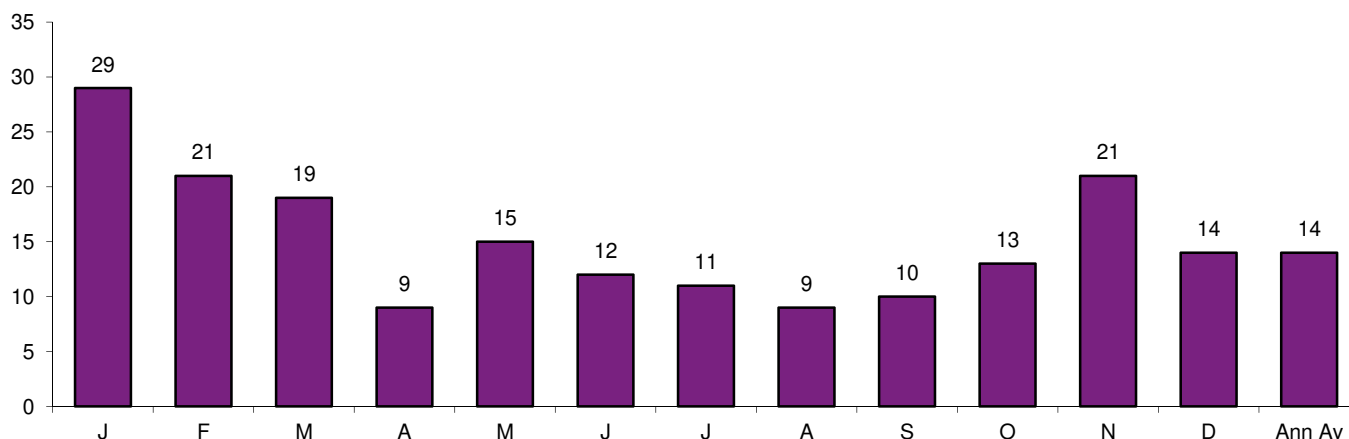


The overseas occupancy levels for North Wales and the South West have been relatively consistent over recent years, with the annual overseas occupancy rate for North Wales remaining at 3% since 2009 and the South West rate in the range 7%-8% over the past four years. The annual overseas occupancy rate for Mid Wales has increased slightly over the past three years from 3% to 5%. Between 2008 and 2009, the rate for South East Wales fell from 10% to 7%, with this rate rising again in 2011 to 9%.

Percentage of Business Guests

On the monthly occupancy form, operators are asked to identify the number of guests staying in the hotel each night for business purposes. It should be noted that not all participants provide this information.

Figure 3-7 – Hotels - Percentage of Business Guests 2011 (%)



As in previous years, the percentage of business guests was highest at the start and end of the year, a converse trend to that for overall occupancy rates but one which is well-established for UK destinations. The proportion of business guests recorded in January 2011 was 29%, a rate which decreased to its lowest point in April and August 2011 (9%) before increasing to 21% in November, with a decrease to 14% in December. The April and December figures are likely to have been influenced by increased leisure use during these months reflecting the timing of Easter and the Royal Wedding in April and the Christmas Holiday period in December.

As shown in Table 3-3, overleaf, the annual average proportion of business guests was 14%, a slight decrease on the 2010 rate of 15% and the lowest rate recorded over the past nine years. 2011 began with a strong start in terms of business occupancy with a seven percentage point increase recorded in January compared to the same month in 2010 (22% to 29%). The largest decrease was recorded in December 2011 where a rate of 14% was recorded compared to a rate of 20% for the same month in 2010. Again, this may be influenced by the proportion of leisure visits, with poor weather in December 2010 impacting on travel while milder weather in 2011 may have meant that leisure trips, which are often less fixed than business arrangements, were more likely to be taken.

Table 3-3 Trends in Percentage of Business Guests

	% of business guests								
	2003	2004	2005	2006	2007	2008	2009	2010	2011
January	36	41	45	41	33	38	31	22	29
February	33	38	37	30	25	26	26	19	21
March	30	39	30	28	21	19	24	20	19
April	21	25	26	15	15	24	17	13	9
May	18	24	19	17	18	16	16	15	15
June	19	20	21	17	16	19	20	14	12
July	17	22	19	17	14	18	17	13	11
August	13	15	14	14	10	11	11	9	9
September	20	21	22	15	12	18	14	12	10
October	28	25	25	21	15	21	18	15	13
November	38	38	34	24	23	28	19	24	21
December	26	24	28	18	24	21	17	20	14
Annual Average	23	27	25	20	18	20	18	15	14

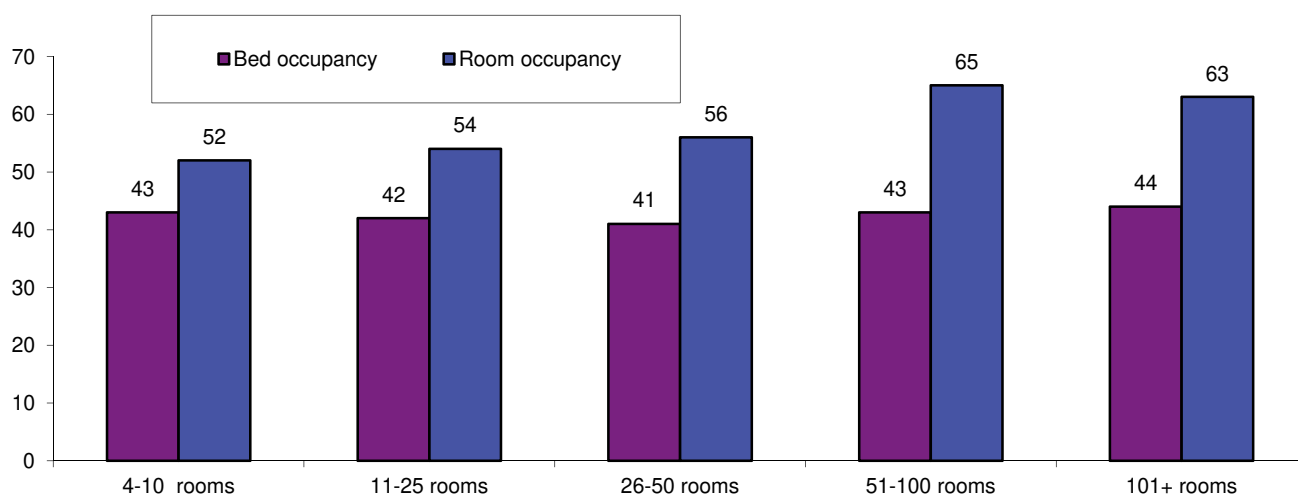
Detailed Analysis of Main Results

This section of the report looks in more detail at different attributes of the hotels and their influence, if any, on levels of bed and room occupancy.

Occupancy by Size of Hotel

The annual average bed and room occupancy figures by size of hotel for 2011 are presented in Figure 3-8 below. Due to the small sample size there is no analysis for hotels with 1-3 rooms. The monthly bed and room occupancy levels for each of the size categories used in the analysis are detailed in Appendix 1b and 1c of this report.

Figure 3-8 - Annual Occupancy by Size of Hotel - 2011 (%)



In previous years, a positive correlation has been recorded in terms of size and bed occupancy rates, a trend less evident in 2011 with occupancy rates in the range 41% - 44% recorded across the various size categories. However, figure 3-8 above does illustrate a general correlation between hotel size and room

occupancy rates. Hotels with between 51 and 100 rooms recorded an annual average bed occupancy rate of 65% and those with over 100 rooms a rate of 63% compared to 52% amongst those with 4 to 10 rooms.

As reported previously, there are a number of factors which could have contributed to this overall positive correlation. Larger hotels tend to be open all year and are more likely to actively market their establishments. Also, many of these are located in cities and large towns, making them more likely to have business guests occupying single rooms.

Table 3-4 - Trends in Annual Room Occupancy Rates by Size of Hotel (%)

	Annual Average Room Occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
4-10 rooms	43	43	44	48	47	47	46	40	40	45	52
11-25 rooms	49	51	50	50	52	53	54	53	55	53	54
26-50 rooms	55	53	54	56	56	58	61	62	58	57	56
51-100 rooms	60	60	63	66	60	62	64	66	63	66	65
101+ rooms	67	68	68	68	69	71	68	67	69	68	63

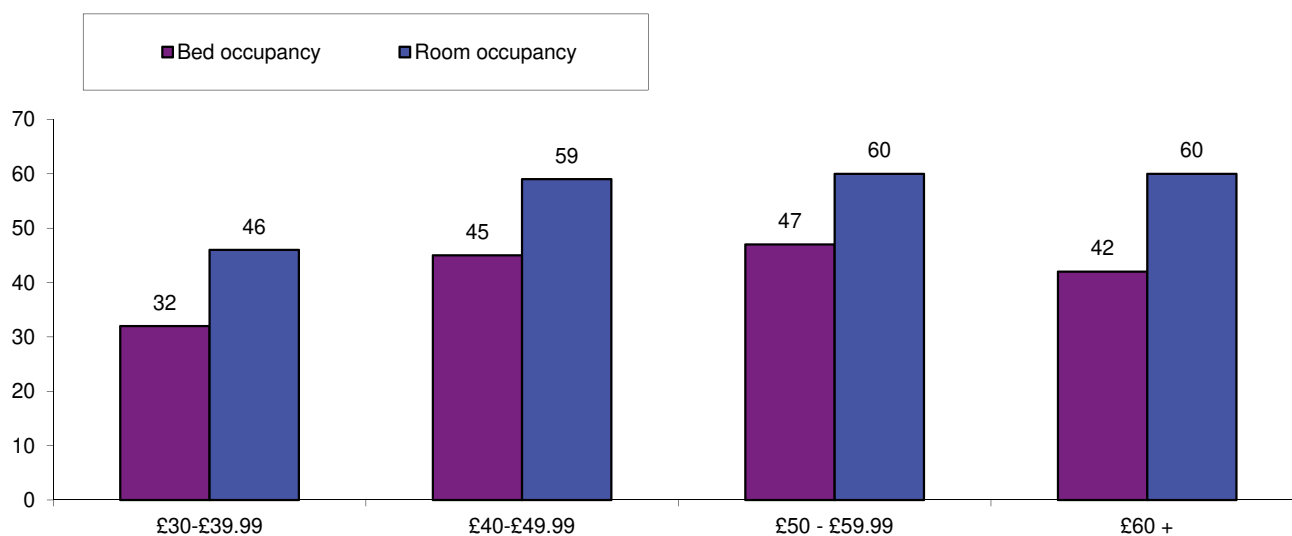
While larger establishments recorded the highest annual average room occupancy rates in 2011, the rate for those with 51 to 100 rooms was slightly lower than in 2010 (65% and 66% respectively), while the rate for those with over 100 rooms fell by five percentage points over the same time period (68% to 63%). It was establishments with between 4 and 10 rooms that recorded the greatest increase in their average room occupancy, with the 2011 rate of 52% seven percentage points higher than the 2010 rate of 45% and the highest recorded for these establishments since 2001.

Occupancy by Tariff

The tariff figures used in the survey relate to the amount charged per person for a double or twin room, including breakfast. The monthly bed occupancy levels for each of the tariff categories used in the analysis are detailed in Appendix 1b and 1c of this section of the report.

Figure 3-9 below shows annual bed and room occupancy figures by tariff for 2011. There is no analysis for hotels with a tariff of less than £20 as only one return was sent in by an establishment charging this rate in 2011.

Figure 3-9 - Annual Occupancy by Tariff of Hotel – 2011 (%)

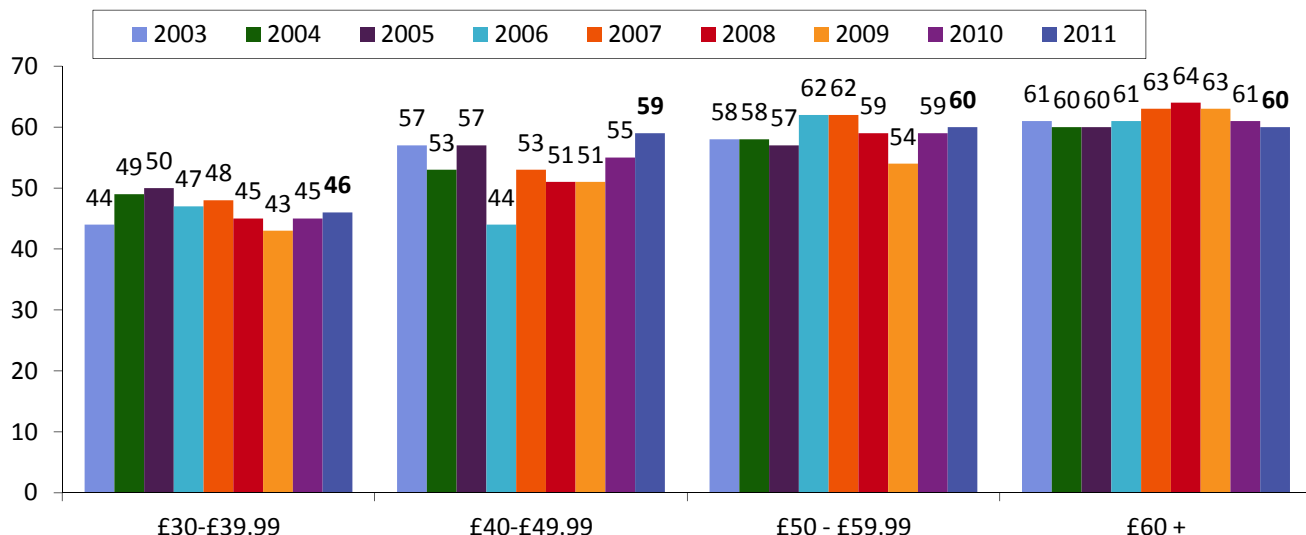


Overall, a positive relationship between the tariff charged and occupancy levels for hotels was again recorded in 2011. Establishments charging £50-£59.99 recorded the highest annual average bed occupancy rate (47%), however, at 42% the rate for hotels charging £60 or more was ten percentage points higher than the rate recorded by those charging £30-£39.99. When analysed by room occupancy, a clear correlation was evident, with a rate of 60% recorded by hotels charging £50-£59.99 and those charging £60 or more compared to 46% for establishments charging £30-£39.99. It is likely that hotels in the highest tariff bands attracted a greater proportion of business guests making use of single occupancy rooms.

For most of the tariff bands, the annual average room occupancy rate recorded was similar to that recorded in 2010. The largest increase was four percentage points for those charging £40-£49.99 which brought the annual average room occupancy rate for these establishments to 59%, the highest recorded since 2003.

Figure 3-10 overleaf shows the annual average room occupancy rates by tariff for the period 2003 - 2011.

Figure 3-10 - Trends in Annual Room Occupancy Rates by Tariff of Hotel (%)



Occupancy by Location

Occupancy rates were analysed according to the location of the hotel - in a city/large town, a small town, at the seaside or in the countryside/village. The monthly bed and room occupancy levels for each of the location categories are detailed in Appendix 1b and 1c to this report.

The annual average bed and room occupancy figures by location are illustrated in Figure 3-11 below.

Figure 3-11- Annual Occupancy by Location of Hotel - 2011 (%)



As in previous years, establishments located in cities and large towns recorded the highest annual average room occupancy rate in 2011 (62%). Unlike previous years, however, it was establishments in seaside areas that recorded the highest annual average bed occupancy rate of 45%. The lowest annual average bed occupancy rate was recorded for hotels in small towns (38%), while the lowest annual average room occupancy rate was recorded for hotels in countryside/village locations (55%). In 2011, the largest differentials between annual average bed and room occupancy rates were recorded for

establishments in small towns, a difference of twenty-two percentage points and cities/large towns (twenty-one percentage points).

Table 3-5 - Trends in Annual Room Occupancy Rates by Location of Hotel (%)

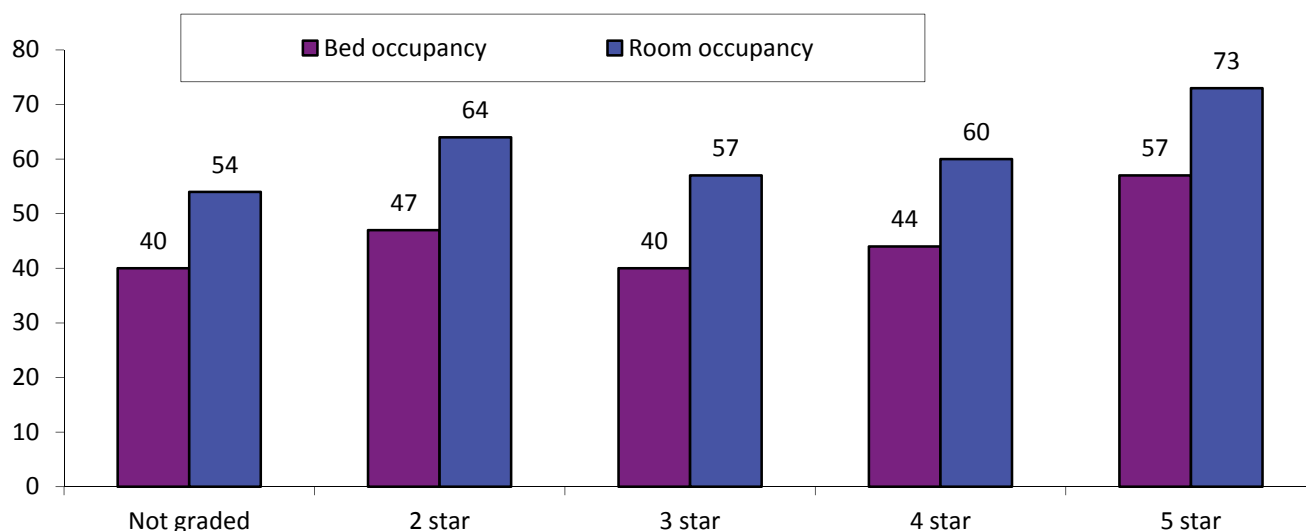
	Annual Room Occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
City/large town	66	69	72	69	67	71	71	71	69	66	62
Small town	54	52	53	54	56	57	57	53	55	61	59
Seaside	56	56	57	56	56	57	62	60	58	59	60
Countryside/village	48	49	52	53	53	53	52	53	52	53	55

Between 2010 and 2011, the annual average room occupancy rate for establishments in countryside/village locations rose by two percentage points to 55% (from 53%), while the rates for those in small towns and seaside areas were similar in 2011 to those recorded in 2010, with a decrease of one percentage point and an increase of one percentage point respectively over this time period. Following a period of stability between 2006 and 2008, the annual average room occupancy rate for hotels in cities/large towns has decreased year-on-year since 2008, with the decrease of four percentage points in 2011 meaning that this rate (62%) is the lowest recorded since 2001.

Occupancy by Grading

Since 1999, occupancy rates for hotels have been analysed according to their grading under the Star Grading Scheme administered by Visit Wales (formerly Wales Tourist Board). On this basis, there are no comparable figures available prior to 1999. There is no analysis for establishments graded 1 star hotels as there are no hotels with this grading in the sample.

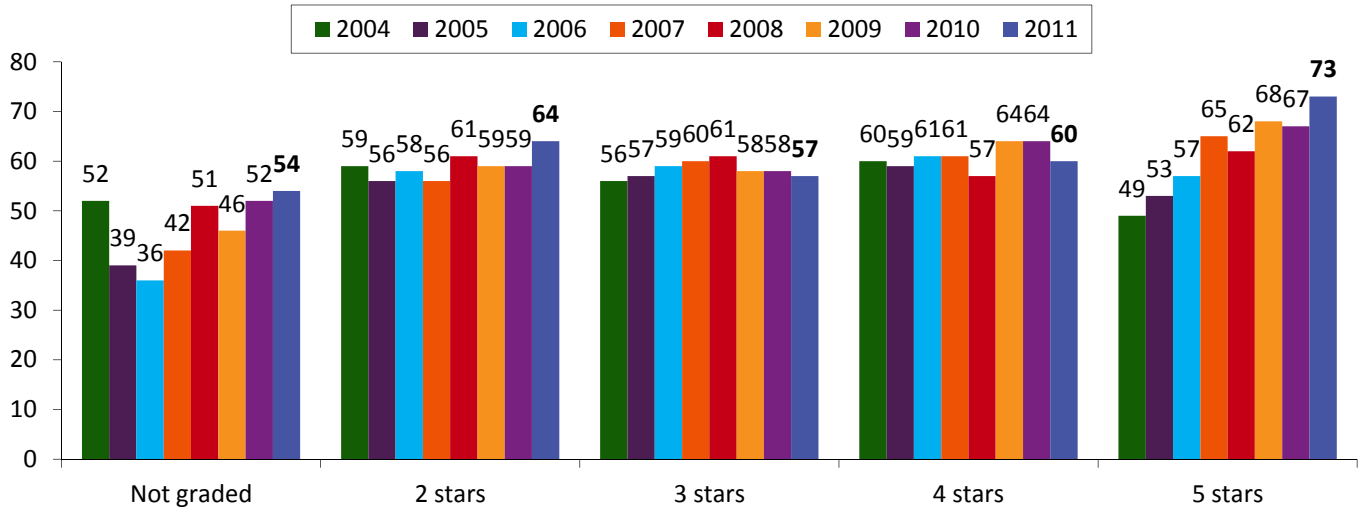
Figure 3-12 - Annual Occupancy by Grading of Hotel – 2011 (%)



Hotels not graded within the Visit Wales grading scheme recorded the lowest annual average room occupancy rate in 2011 (54%), while the average bed occupancy rate for these establishments was equal to that recorded by 3 star establishments (40% each). Within the Visit Wales grading scheme, hotels with the highest star grading recorded the highest annual averages, with rates of 57% and 73% for bed and room occupancy respectively.

As illustrated in Figure 3-13 below, the 2011 annual average room occupancy rate for hotels with a 3 star grading (57%) remained similar to that in 2010 (58%). Other rates showed greater variation, with increases of five and six percentage points respectively for those with a 2 and 5 star grading, while those with 4 stars recorded a decrease from 64% in 2010 to 60% in 2011. The annual average room occupancy rate for ungraded establishments rose from 52% in 2010 to 54% in 2011. Monthly and annual average room occupancy figures for grading are presented in Appendix 1b and 1c.

Figure 3-13 - Trends in Annual Room Occupancy Rates by Grading of Hotel (%)



Guest Houses and Bed and Breakfasts

Section 4 of the report presents the monthly and annual average bed and room occupancy levels for guest houses and bed and breakfast establishments. For details of the survey methodology, please refer to Section 2.

Sample Size

In 2011, 152 guest houses and bed and breakfast establishments participated in the survey i.e. provided occupancy information for at least one month during the course of the year. To ensure that the results are comparable across the months, a considerable amount of effort was placed on trying to maintain the level of response each month and operators have been encouraged to provide responses for each month of the year.

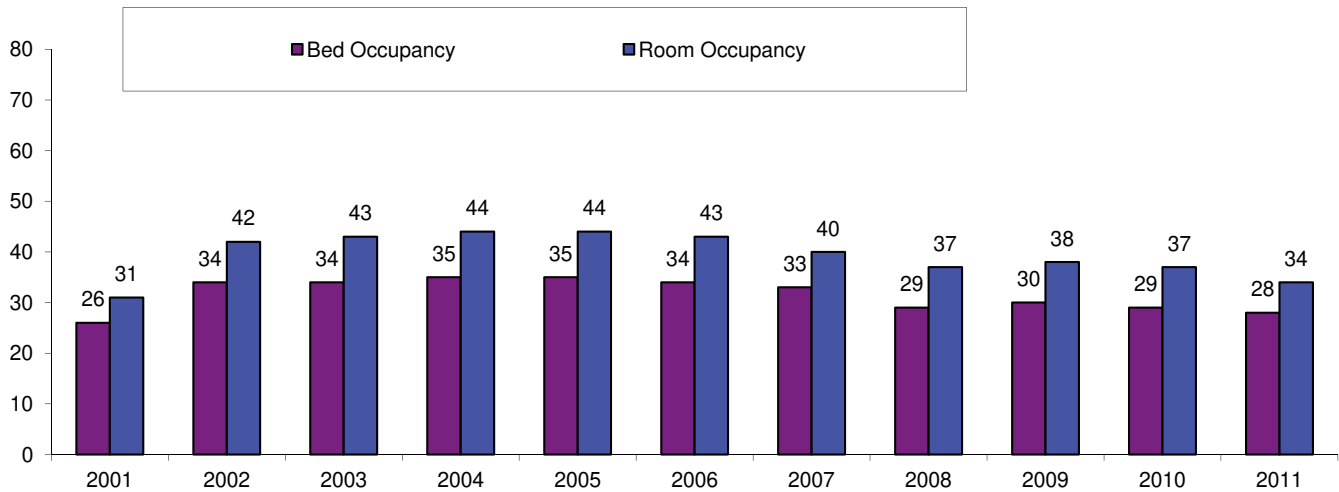
45% of the operators (68) who contributed to the survey provided data for every month of the year. A further 7% (10) provided data for all but one month.

During 2011, 15 guest house and bed and breakfast establishments were recruited to take part in the survey. However, in the same period 13 establishments withdrew or were removed from the survey. Establishments were removed as they had not provided returns over a long period of time and reasons for withdrawal included ill health, old age, being too busy, retirement and establishments being sold or no longer operating.

Annual Average Bed and Room Occupancy

As shown in Figure 4-1 below, overall occupancy rates for Guest Houses and Bed and Breakfasts have still to recover from the effects of the economic recession. The annual average bed occupancy rate decreased by one percentage point in 2011 to 28%, while the annual average room occupancy rate decreased by three percentage points to 34%. These are the lowest occupancy rates recorded over the past ten years.

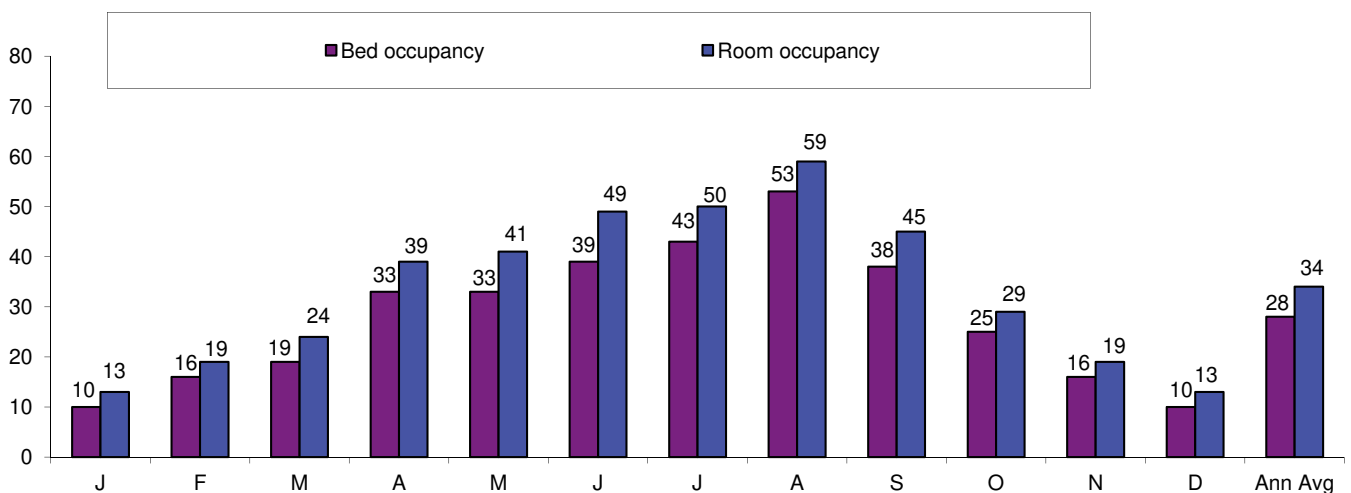
Figure 4-1 - Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the guest house and bed and breakfast sector in 2011 are presented in Figure 4-2 below.

Figure 4-2 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2011 (%)



As in previous years, the seasonal nature of this sector is evident with average bed occupancy rates at their highest for guest houses and bed and breakfasts during the main tourist season (May to

September). Bed occupancy levels varied from 10% in January to a peak of 53% in August before decreasing to 10% in December. Room occupancy levels followed a similar pattern climbing from 13% in January to 59% in August before decreasing to 13% in December 2011.

As shown in Table 4-1 below, average room occupancy rates were lower in 2011 than for most months in 2010. The greatest decreases were recorded outside of the main summer months, with a decrease of ten percentage points recorded between October 2010 and the same month in 2011 (39% and 29% respectively), while a decrease of six percentage points was recorded in November (from 25% to 19%). A slight increase was recorded in April 2011 (38% to 39%), a month in which both the Easter Holiday period and an additional Bank Holiday for the Royal Wedding fell in 2011. The August 2011 rate of 59% represents a two percentage point increase on the 2010 figure of 57% and a return to the rate recorded in 2008 and 2009 for this month.

Trends in monthly bed occupancy rates are presented in Appendix 2a.

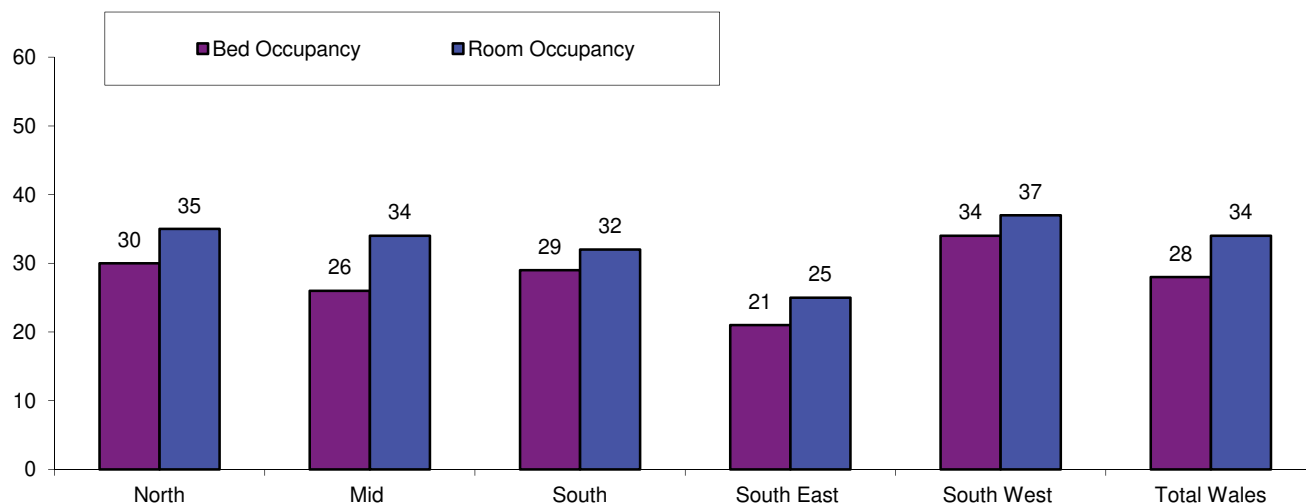
Table 4-1 - Guest Houses/B&Bs - Trends in Room Occupancy Rates - Monthly Averages (%)

	Room occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
January	14	22	21	22	26	17	19	18	17	15	13
February	20	26	27	27	29	27	27	26	25	24	19
March	14	34	30	29	36	28	29	30	27	27	24
April	24	33	45	44	40	42	40	34	38	38	39
May	34	45	52	49	49	52	49	46	45	42	41
June	38	57	50	57	56	57	50	45	48	50	49
July	51	60	61	64	63	65	54	54	54	53	50
August	60	70	72	73	72	71	66	59	59	57	59
September	42	54	54	56	59	56	51	47	51	50	45
October	32	41	39	43	41	43	39	38	39	39	29
November	22	29	30	28	24	28	27	25	25	25	19
December	17	24	24	25	20	27	19	21	21	18	13
<i>Annual Average</i>	<i>31</i>	<i>42</i>	<i>43</i>	<i>44</i>	<i>44</i>	<i>43</i>	<i>40</i>	<i>37</i>	<i>38</i>	<i>37</i>	<i>34</i>

Regional Occupancy Rates

Figure 4-3 below presents the annual average bed and room occupancy rates for guest houses and bed and breakfast establishments for each region of Wales in 2011. The monthly bed and room occupancy rates for each area are presented in Appendix 2b and 2c of this report.

Figure 4-3 - Guest Houses/B&Bs - Annual Average by Regions of Wales – 2011 (%)



The annual average bed and room occupancy rates were highest for the South West region in 2011 (34% and 37% respectively). Establishments in North Wales recorded an annual average bed occupancy rate of 30% while lower rates were recorded by those in the South East (21%) and Mid Wales (26%). The annual average room occupancy rate for establishments in South East Wales was 25%, a lower proportion than was recorded for each of the other three regions.

Trends in Regional Occupancy Rates

Room occupancy levels in each region since 2000 are presented in Table 4-2 below.

Table 4-2 - Guest Houses/B&Bs - Trends in Room Occupancy Rates by Regions of Wales (%)

	Room occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
North Wales	29	38	40	42	44	43	41	35	39	39	35
Mid Wales	24	33	33	33	34	33	33	29	33	32	34
South Wales	37	50	49	50	49	48	44	43	40	38	32
South East	37	52	52	52	51	49	46	43	40	38	25
Wales											
South West	36	48	46	48	47	48	43	43	39	39	37
Wales											
<i>Total Wales</i>	31	42	43	44	44	43	40	37	38	37	34

The annual average room occupancy rate for establishments in Mid Wales was two percentage points higher in 2011 than the rate recorded in the previous year (34% and 32% respectively). The rate for North Wales decreased by four percentage points between 2010 and 2011 to 35%, while a decrease of two percentage points was recorded by establishments in South West Wales. The annual average room

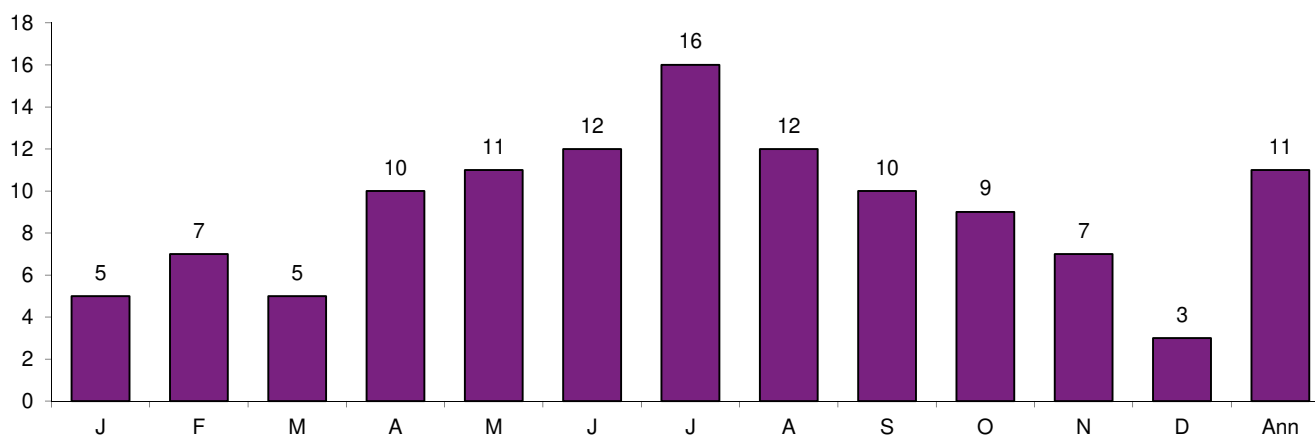
occupancy rate for South East Wales was thirteen percentage points lower than in 2010 and is the lowest rate recorded since 2001. This region has traditionally attracted a higher proportion of business visitors, which may mean that these travellers are using this type of accommodation less frequently. It should be borne in mind that the sample size for the South East region for business occupancy is low and that not all of those who did supply business occupancy data did so for every month, therefore, results should be treated with caution.

Percentage of Overseas Guests

As described in the previous section (Section 3), there has been a minor change in the way that data is collected for overseas guests. In 2008, the forms used to collect occupancy data were updated to make them more focussed and efficient. One of the changes affected the way information on overseas guests is collected. In previous years, establishments were asked to provide information on the number of new arrivals for each day (both UK and overseas) and the percentage of overseas guests based on the total number of arrivals was presented. This information is now not collected, so consequently, the proportion of overseas stays is presented as a percentage of overseas bed nights (based on total bed nights).

In light of these changes and to ensure consistency that overseas figures across years are compared based on the same methodological process, the amount of trended information presented for overseas guests has been reduced and the focus in this report is on the latest 2008 to 2011 results.

Figure 4-4 – Guest Houses/B&Bs - Percentage of Overseas Bednights - 2011 (%)

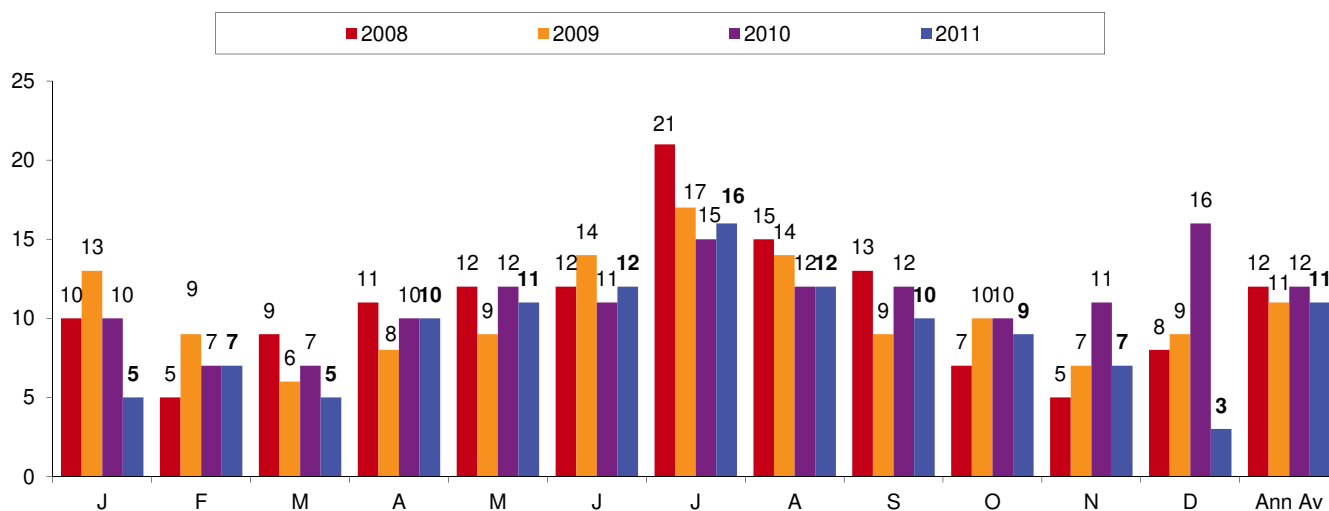


As in a number of previous years, the percentage of overseas guests was highest during the May to September period in 2011 with rates of 10% to 16% recorded. A rate of 10% was also recorded in April 2011, which may have been influenced by the occasion of the Royal Wedding. In 2010, a rate of 16% was recorded for December. As discussed earlier, overall occupancy rates for December were lower in December 2010 than in 2009, indicating that establishments in this sector received a lower proportion of UK visitors during this month, probably due to the severe winter weather. In 2011, the overseas occupancy rate was 3% which indicates that a greater proportion of those staying in Guest Houses and Bed and Breakfasts during this month in 2010 were from the UK.

Trends in Percentage of Overseas Guests

Across the four years shown in Figure 4-5, the percentage of overseas guests has not varied significantly, remaining in the range 11% - 12%. However, there have been some considerable variations by month. The largest differences were recorded In January and December 2011, where the percentage of overseas guests fell by five and thirteen percentage points respectively.

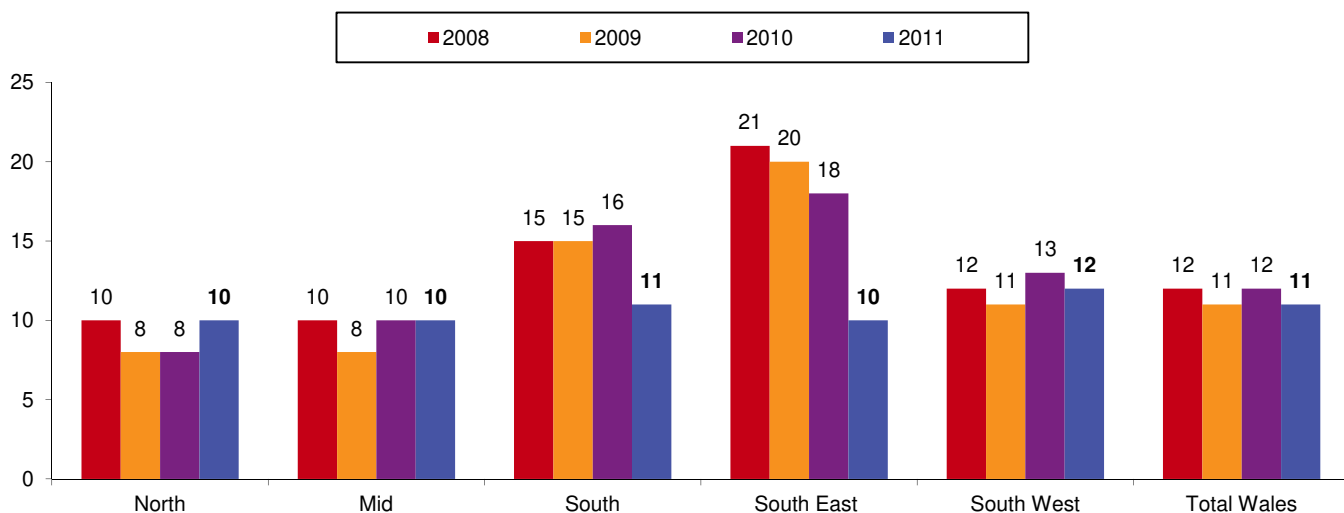
Figure 4-5 - Guest Houses/B&Bs - Trends in Percentage of Overseas Bednights



The South East (which includes the capital city of Cardiff) has in previous years recorded the highest proportion of overseas occupants. However, in 2011, the percentage of overseas guests for this region was equal to that recorded in North and Mid Wales, as well as being some eight percentage points lower than in 2010 (see Figure 4-6 overleaf). This is due to both a decrease in the sample providing overseas data (21 in 2010, 13 in 2011) and also, a significant decrease in the overseas occupancy rate reported by six of the thirteen who did return this data in this region in 2011.

The percentage of overseas guests remained equal to 2010 for establishments in Mid Wales, while the rate for North Wales increased by two percentage points to 10% and the rate for the South West fell slightly from 13% in 2010 to 12% in 2011.

Figure 4-6 – Guest Houses/B&Bs - Percentage of Overseas Guests by Region 2008 – 2011 (%)



Percentage of Business Guests

As with hotels, since February 2001, guest house and bed and breakfast operators have been asked to record the number of guests staying for business purposes. Please note that not all participants provide us with this information.

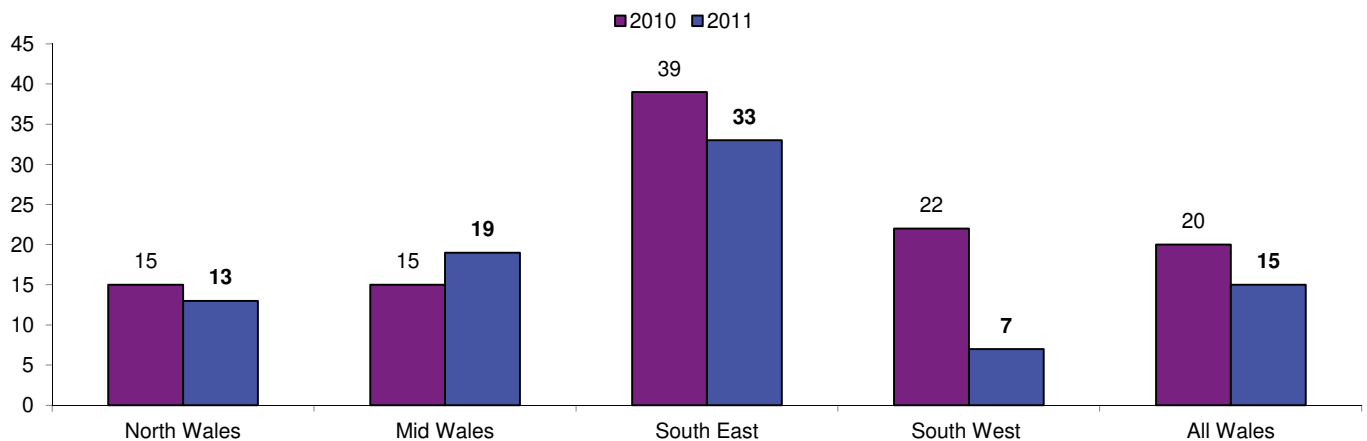
Figure 4-7 - Guest Houses/B&Bs - Percentage of Business Guests – 2010 & 2011 (%)



The annual average proportion of business guests in bed and breakfast and guest house establishments in 2011 was 15%, a five percentage point decrease on the 2010 rate of 20% and lower than the 2009 rate of 21%. The highest percentages of business guests were recorded in January and November 2011 (43% and 42% respectively). The greatest variations between 2010 and 2011 in terms of business occupancy were recorded in January (a decrease of eighteen percentage points), February (an decrease of ten percentage points) and April (a decrease of fourteen percentage points). The Easter Holiday period and a Royal Wedding took place in April 2011, which is likely to have influenced the proportion of leisure guests during this month. Please note that the sample providing business occupancy data across Wales was lower for the majority of months in 2011 than provided this information in 2010.

As reported in previous years, a significantly higher proportion of business guests were recorded in the South East than in other regions (33% compared to 7% in South West Wales). Again, please note that not all participants supply this information, therefore, results are more variable than overall occupancy rates.

Figure 4-8 - Guest Houses/B&Bs – Annual Average Percentage of Business Guests by Region – 2011 (%)



When compared to 2010, it was the South West region that demonstrated the greatest variation when compared to 2011 with a decrease of fifteen percentage points in the annual average business occupancy rate for this region in 2011 (7% compared to 22% in 2010). The South East recorded a decrease of six percentage points between 2010 and 2011, while a decrease of two percentage points was recorded in North Wales over this time period. Mid Wales, however, recorded an increase of four percentage points between 2010 and 2011 (15% to 19%). Again, please note that not all participants supply this information, therefore, results are more variable than overall occupancy rates. In addition, the sample providing this data was lower in the South West region for the majority of months in 2011 than provided this information in this region in 2010.

Detailed Analysis of Main Results

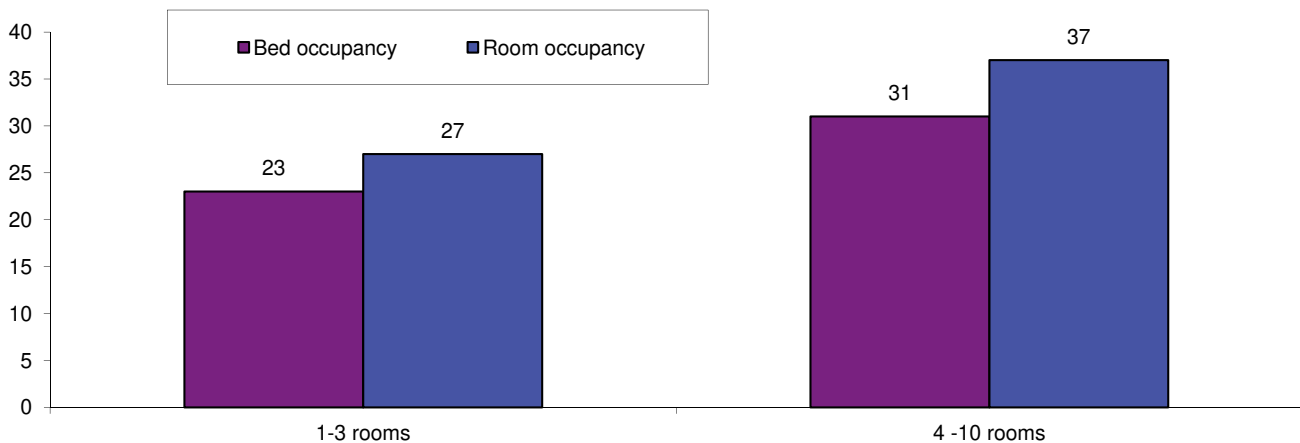
This section of the report looks in more detail at different types of guest house and bed and breakfast establishments which contributed to the survey and the impact, if any, these factors have on levels of bed and room occupancy.

Occupancy by Size of Guest House/Bed & Breakfast

Due to the small sample size in many of the larger size categories, occupancy rates are only presented for two categories of guest houses and bed and breakfasts: 1-3 rooms and 4-10 rooms.

The monthly average bed and room occupancy figures by size of guest house and bed and breakfast are presented in Appendix 2b and 2c.

Figure 4-9 - Annual Occupancy by Size of Guest House/Bed & Breakfast - 2011 (%)



As reported previously for this sector and for hotels, there would appear to be a positive relationship between occupancy rates and establishment size. Establishments with 4-10 rooms recorded annual average bed and room occupancy rates of 31% and 37% respectively compared to 23% and 27% respectively amongst those with 1-3 rooms. The higher occupancy amongst these establishments is likely to be a result of a number of factors including the fact that larger establishments are more likely to be open all year and they are also more likely to attract business guests.

Table 4-3 - Trends in Annual Room Occupancy Rates by Size of Guest House/Bed & Breakfast (%)

	Annual Average Room Occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
1-3 rooms	26	33	34	36	36	34	33	31	30	32	27
4-10 rooms	36	45	45	48	48	47	47	40	43	40	37

The annual average room occupancy rate was lower for both establishments with 1-3 and 4-10 rooms in 2011 compared to the comparable rates for 2010. The largest decrease was recorded for those with 1-3 rooms, with a rate of 27% in 2011 compared to 32% in 2010. The rates for both size bands were similar to those recorded in 2001.

Occupancy by Tariff

As in the hotel survey, the tariff figures used in the survey relate to the amount charged per person for a double or twin room, including breakfast. The monthly bed and room occupancy levels for each of the tariff categories used in the analysis are detailed in Appendix 2b and 2c of the report. It should be noted that due to the sample size, results are only presented for those establishments with a tariff of more than £20.

Figure 4-10 below presents annual bed and room occupancy figures by tariff for 2011. While in previous years, there has appeared to be a positive correlation between tariff and occupancy levels, tariff appeared to have less of an influence on occupancy in 2011. The annual average bed occupancy rate for establishments charging £30 or more was in the range 29%-30% in 2011, while the annual average room occupancy rate was between 34% and 35%.

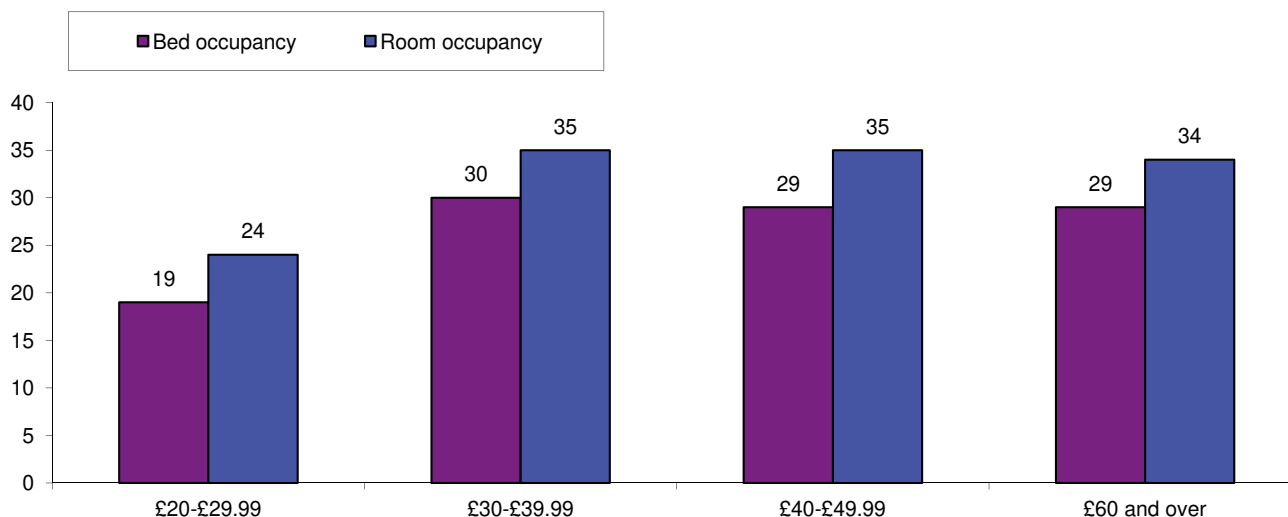
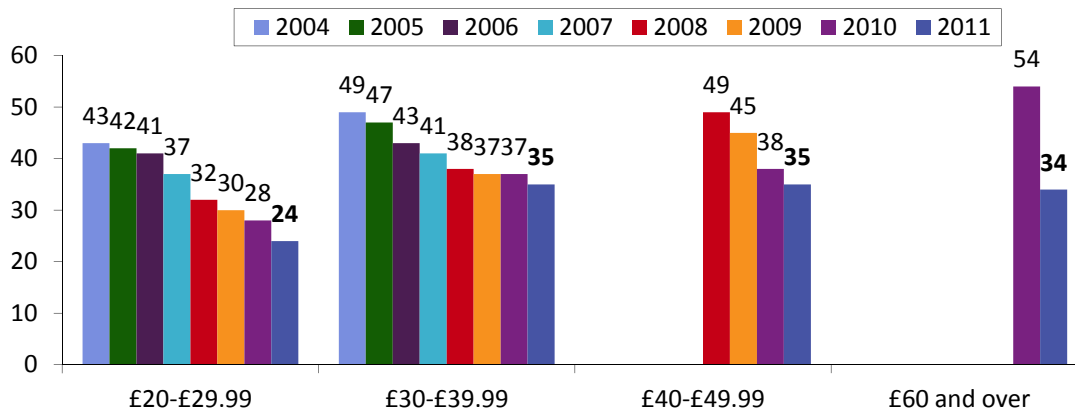
Figure 4-10 - Annual Occupancy by Tariff of Guest House/B&B – 2011 (%)

Figure 4-11 overleaf presents the annual average bed occupancy rates by tariff between 2004 and 2011. It should be highlighted that, as a result of changes in the tariff bands used in analysis, comparative figures prior to this are not available and due to sample sizes, results for some categories are not available for previous years.

Figure 4-11 - Trends in Annual Room Occupancy Rates by Tariff of Guest Houses/B&Bs (%)

Between 2010 and 2011, the annual average room occupancy rate for establishments charging £60 and over decreased by twenty percentage points to 34%. Please note that the sample size for these establishments is small, therefore, variations between the two years should be treated with caution. Other decreases were less marked with a four percentage point decrease between 2010 and 2011 in the annual average room occupancy rate for those charging £20-£29.99 (to 24%), while the rate for those charging £30-£39.99 decreased from 37% to 35% and for those charging £40-£49.99 from 38% to 35% over the same period of time.

The sample size for establishments charging under £20 was too small to feature.

Occupancy by Location

Occupancy rates were analysed according to the location of the guest house and bed and breakfast establishment - in a city/large town, a small town, at the seaside or in the countryside/village locations. The monthly bed and room occupancy levels for each type of location are presented in Appendix 2b and 2c.

As in 2010, annual average bed and room occupancy rates were highest in seaside areas in 2011 (35% and 42% respectively) but were followed by small towns (33% and 44% respectively) in 2011. Data for cities/ large towns has not been shown due to the small sample size.

Figure 4-12 - Annual Occupancy by Location of Guest House/B&B – 2011 (%)

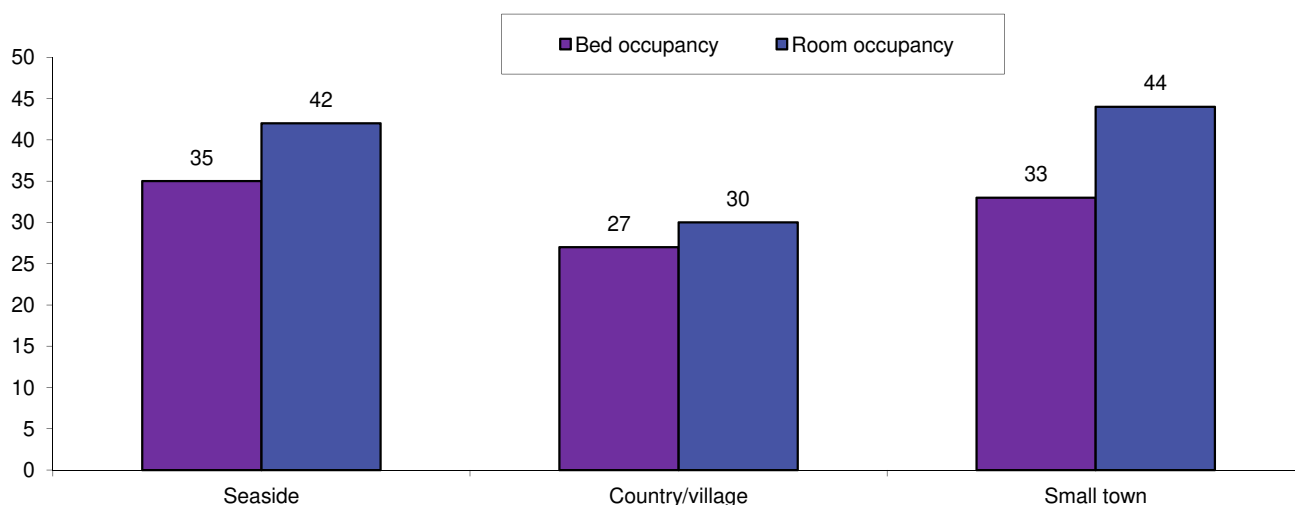


Table 4-4 - Trends in Annual Room Occupancy Rates by Location of Guest House/B&B (%)

	Annual Average Room Occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Small town	28	43	39	38	42	41	40	38	40	37	44
Seaside	39	37	44	46	47	47	46	44	42	46	42
Country/village	27	41	40	41	41	40	36	33	33	34	30

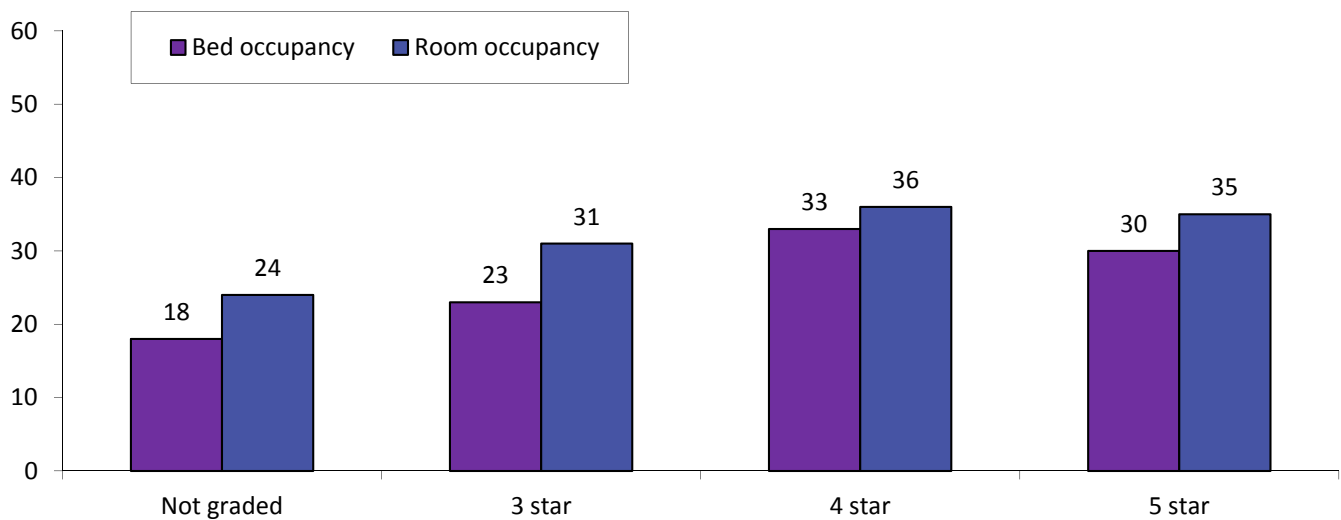
The annual average room occupancy rate for establishments in small towns increased by seven percentage points in 2011 to 44%, the highest rate recorded for these establishments over the past ten years. Those in seaside areas recorded a decrease of four percentage points between 2010 and 2011 (46% to 42%), as did those in countryside/village areas (34% to 30%).

Occupancy by Grading

As with hotels, occupancy rates for guest house and bed and breakfast establishments were analysed according to their grading under the Star Grading Scheme administered by Visit Wales (formerly Wales Tourist Board), introduced in 1999.

Figure 4-13 below presents annual bed and room occupancy figures by grading for 2011. Due to the small sample size of establishments with 1 and 2 stars there is no analysis for these grading categories.

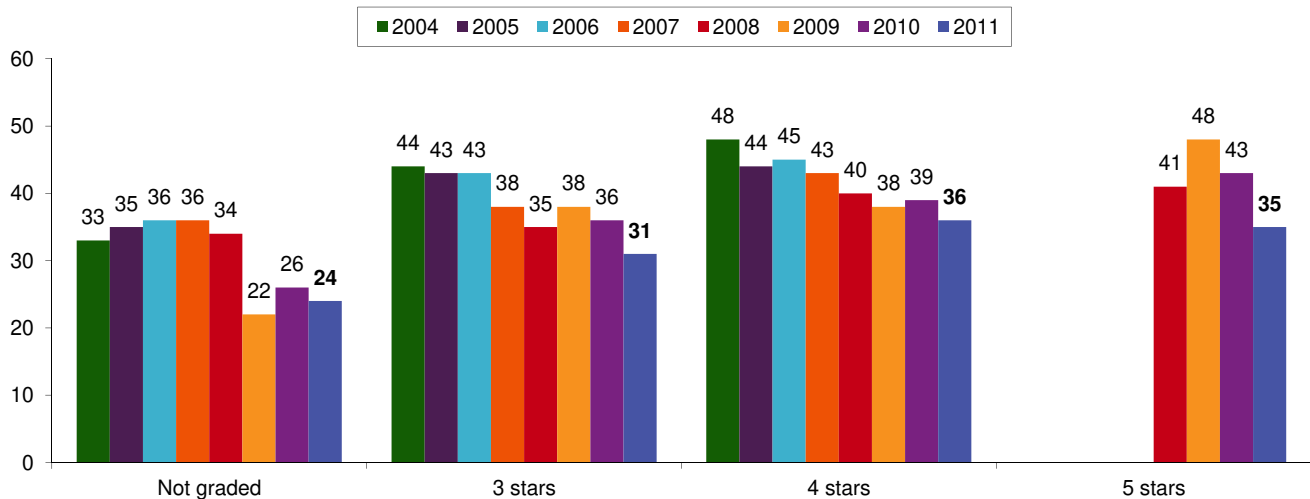
Figure 4-13 - Occupancy by Grading of Guest House/B&B - 2011 (%)



As shown in the chart above, there was generally, a positive correlation between occupancy level and grade, with ungraded establishments recording the lowest annual average bed and room occupancy rates of 18% and 24% percentage points respectively. Establishments with a 5 star grading recorded a lower annual average bed occupancy rate than those with 4 stars (30% and 33% respectively), with only a very slight difference recorded in the annual average room occupancy rates for these grading categories in 2011 (35% and 36% respectively).

Figure 4-14 below shows the trends in annual room occupancy rates by grading. Please note data has not been presented for 1 and 2 star establishments and, for some previous years, for 5 star establishments due to limited sample sizes.

Figure 4-14 - Trends in Annual Room Occupancy Rates by Grading of Guest House/B&B (%)



Between 2010 and 2011, the largest decrease was recorded for establishments with a 5 star grading with the annual average room occupancy rate for these establishments falling to 35% in 2011, the lowest rate recorded since 2008. Four star establishments recorded a decrease of three percentage points over this time period, while the rate for 3 star establishments fell from 36% to 31%. Ungraded establishments recorded the smallest decrease of two percentage points in their annual average room occupancy rate between 2010 and 2011.

Monthly and annual average bed and room occupancy figures for the different grades are presented in Appendix 2b and 2c to the report.

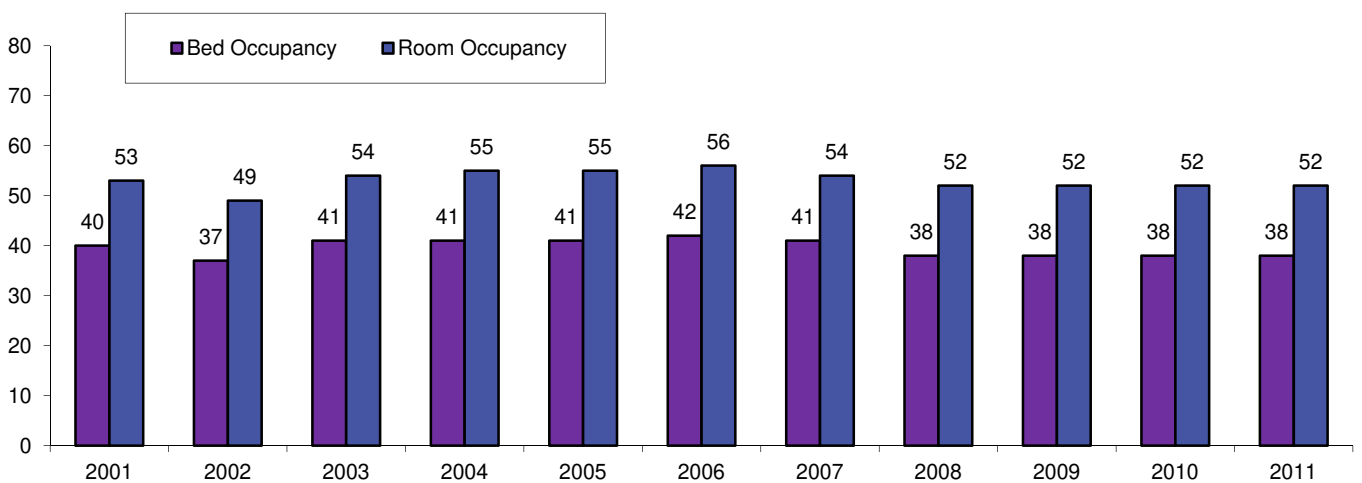
All Serviced Accommodation

Section 5 of the report presents the monthly and annual average bed and room occupancy levels for all the various types of serviced accommodation i.e. hotels, guest houses and bed and breakfast establishments.

Annual Average Bed and Room Occupancy

The annual average bed for all serviced accommodation has remained consistent at 38% for the past four years. Likewise, the annual average bed occupancy rate has been at 52% for the past four years.

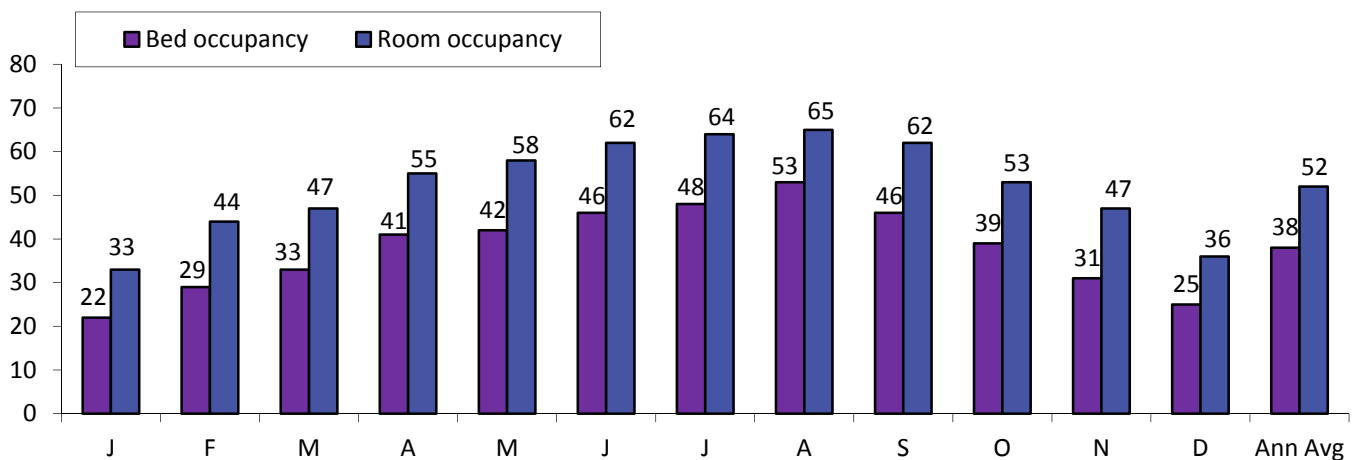
Figure 5-1 - Serviced Accommodation - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded for all serviced accommodation are presented in Figure 5-2 below.

Figure 5-2 – All Serviced Accommodation - Monthly Bed & Room Occupancy - 2011 (%)



As in previous years, seasonality is again evident in the monthly occupancy rates for all serviced accommodation. Between May and September, the average bed occupancy rate was in the range 42% - 53%, while the average room occupancy rate was in the range 58% - 65% during the same period. The impact of the Easter Holiday period and Royal Wedding are clear, with an increase of eight percentage points in the average bed and room occupancy rates between March and April 2011.

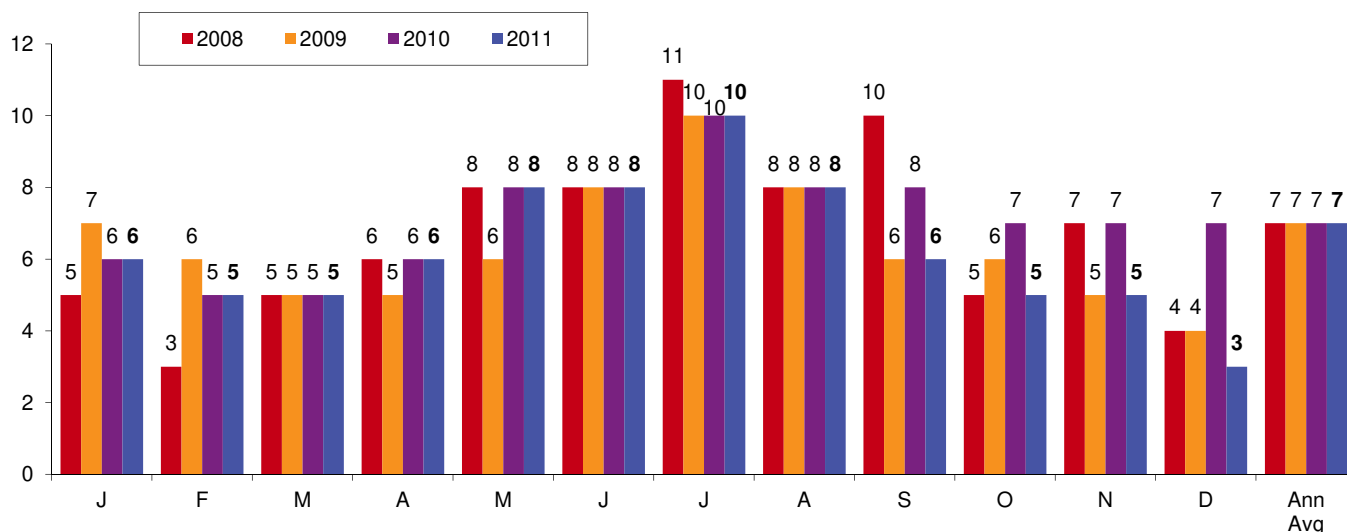
Percentage of Overseas Guests

Operators are asked to identify the number of guests staying in their establishment each night by nationality - UK and overseas - on their monthly occupancy form. It should be noted that not all respondents provide this information, therefore, results should be treated with caution.

From the start of 2008, arrivals information for both UK and Overseas guests was no longer collected, which has affected the way in which data for overseas guests has been calculated. Previously, establishments were asked to provide information on the number of new arrivals for each day (both UK and overseas) and we presented the percentage of overseas guests based on the total number of arrivals. This information is now not collected, so consequently, the proportion of overseas stays is presented as a percentage of bed nights (based on total bed nights).

In the light of these changes and to ensure consistency in the way that overseas figures across years are compared based on the same methodological process, the amount of trended information presented for overseas guests has been reduced and the focus in this report is on 2008 to 2011 results.

Figure 5-3 – All Serviced Accommodation - Percentage of Overseas Bednights – 2008 - 2011 (%)



The annual average percentage of overseas guests has remained at 7% for the past four years. There has been some variation when analysed by individual months over the past four years, particularly outside of the main tourist season. The percentage of overseas guests recorded in December 2008 and 2009 was 4%, a rate which rose to 7% in 2010 before falling to 3% in 2011.

Self Catering Cottages and Apartments

This section outlines the key occupancy results for self catering accommodation cottages and apartments and summarises the information obtained from a sample of verified independent operators and agencies offering self-catering cottages and apartments in Wales. The sample was designed to be largely representative of the range of furnished accommodation let through such operators. Occupancy is measured at the individual property level by expressing the number of weeks let each month as a proportion of the weeks and units available to rent.

It should be noted that, in 2007, there was not a sufficient sample of self-catering agencies (letting agencies offering self-catering cottages and apartments in Wales) to run a separate analysis. For this reason, agency data is reported for 2008 onwards.

Sample Size

Table 6-1 below illustrates response levels to the survey throughout 2011 for the different accommodation types. It features the number which made a return to the survey each month and the number available for let which formed the sample for analysis. Operators whose properties were known to be closed during the winter months were not sent monthly forms, but were included in the response level calculation.

Table 6-1 - Sample Size – Self Catering Cottages and Apartments

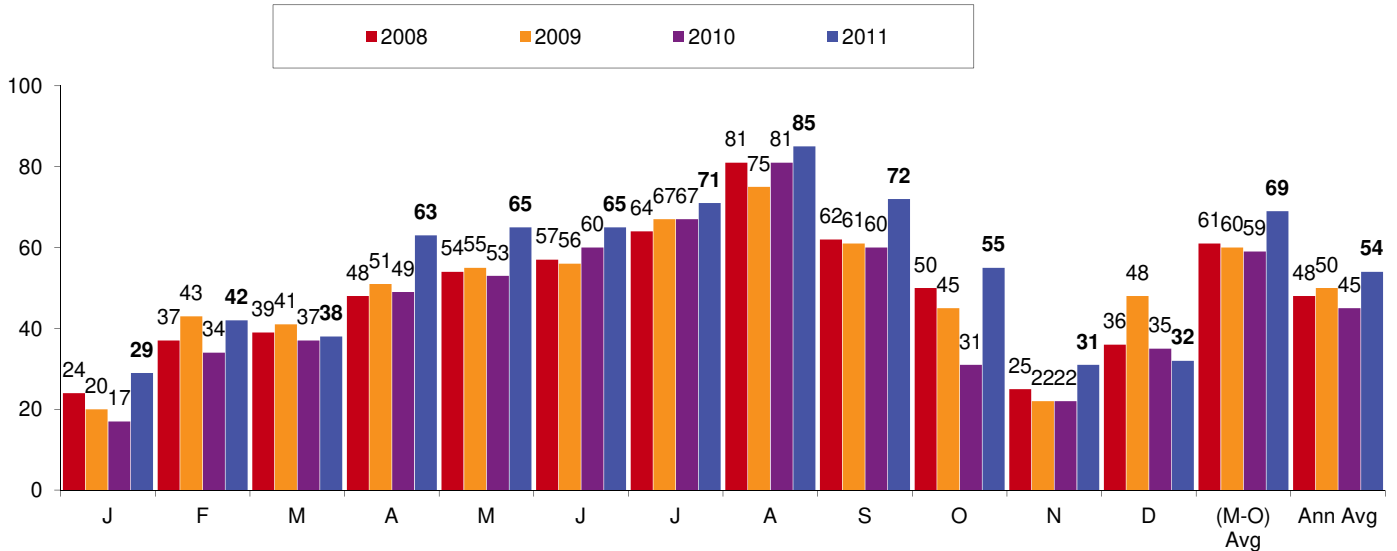
	Number of properties		
	Making Returns	Closed	Analysis Sample
January	436	22	414
February	475	20	455
March	496	9	487
April	572	3	569
May	583	0	583
June	590	0	590
July	608	0	608
August	605	0	605
September	611	0	611
October	578	5	578
November	444	16	428
December	451	16	435
Average	543	13	530

On average, data for 543 properties was received every month, providing an average sample size of 530 properties to analyse. When interpreting the results it is important to note a smaller sample was obtained in 2011, primarily due to an operator with a large number of properties who returned data in 2010 but not for 2011.

Monthly Unit Occupancy

Figure 6-1 below presents annual unit occupancy rates for 2008 to 2011 across both independent and agency operators.

Figure 6-1- Monthly Unit Occupancy – Cottages and Apartments ALL (%)



The monthly unit occupancy rate for all properties in 2011, as in previous years, varies considerably throughout the year, reflecting the seasonal nature of this sector. The January 2011 monthly unit occupancy rate was 29%, a figure which increased to 85% in August before falling to 31% in November and 32% in December. Between March and April 2011, this monthly rate increased by twenty-five percentage points, reflecting the impact of the Easter Holiday period and an additional Bank Holiday due to the Royal Wedding. The annual average for all properties in 2011 was 54%.

The May to October average fell slightly each year between 2008 and 2010, with an overall decrease during this period from 61% to 59%. In 2011, this figure rose to 69%, influenced largely by increased occupancy rates in May and September 2011 (65% and 72% in 2011 compared to 53% and 60% in 2010). The annual unit occupancy rate for 2011 was nine percentage points higher than the 2010 rate of 45% and the highest annual average unit occupancy recorded since 2008. When analysed by individual months, the greatest variations can be seen either side of the main summer season, with increases in April, May and September (as described previously). In addition, the rate for November 2011 (31%) was nine percentage points higher than the 2010 rate of 22%.

Table 6-2 overleaf presents the annual 2011 occupancy rates for independent operators. As described earlier in the report, data from 2007 to 2010 has also been provided to illustrate trends over the last couple of years.

Table 6-2 - Monthly Unit Occupancy – Cottages and Apartments - Independent (%)

	Average Unit Occupancy				
	2007	2008	2009	2010	2011
January	22	23	24	22	24
February	40	40	39	34	39
March	43	43	37	36	32
April	54	48	55	56	62
May	69	61	62	58	60
June	76	67	70	67	59
July	86	76	80	73	69
August	93	87	88	86	87
September	73	69	72	67	69
October	60	52	55	49	48
November	32	26	27	27	25
December	39	42	36	34	30
<i>May – October average</i>	<i>76</i>	<i>69</i>	<i>71</i>	<i>67</i>	<i>65</i>
<i>Annual average</i>	<i>57</i>	<i>53</i>	<i>54</i>	<i>51</i>	<i>50</i>

The average unit occupancy rate for independent operators in 2011 was 50%, a slight decrease on the 2010 rate of 51% and the lowest recorded for these operators since 2007. The May to October average also fell slightly from 67% in 2010 to 65% in 2011, again the lowest rate recorded for the past five years. When analysed by month, the largest decreases between 2010 and 2011 were recorded for the months of March (four percentage points), June (eight percentage points) and July (four percentage points). However, the year did start more positively than in 2010, with rates for January and February (24% and 39% respectively) higher than those recorded for the same months in 2010 (22% and 34% respectively). This may have been due to improved weather conditions at the start of 2011 compared to early 2010.

Table 6-3 overleaf presents annual occupancy figures for self-catering accommodation let by agencies for 2008 to 2011. As noted previously, occupancy data for these types of self-catering properties is not available for 2007.

Table 6-3 - Monthly Unit Occupancy – Cottages and Apartments - Agency (%)

	Average Unit Occupancy			
	2008	2009	2010	2011
January	24	16	13	34
February	36	45	35	46
March	35	44	39	44
April	47	49	44	64
May	51	52	49	69
June	51	43	56	70
July	59	54	64	73
August	78	63	78	84
September	58	51	56	75
October	44	36	21	62
November	23	17	20	40
December	29	57	38	34
<i>May – October average</i>	<i>57</i>	<i>50</i>	<i>54</i>	<i>72</i>
<i>Annual average</i>	<i>45</i>	<i>44</i>	<i>43</i>	<i>58</i>

In 2011, the monthly unit occupancy rate for properties let by an agent ranged from 34% in January to 84% in August to 34% in December. As with independent operators, agency let properties recorded an increase between March and April 2011 (from 44% to 64%), reflecting the Easter Holiday period and the additional Bank Holiday. Improved weather conditions early in 2011 and changes in the sample as described previously contributed to an increase in the monthly average for January, which was twenty-one percentage points higher than the rate recorded for the same month in 2011.

Variations between 2010 and 2011 were most marked during the months of May to October, with an average unit occupancy rate for this period of 72% compared to 54% in 2010. The largest increases during these months were recorded in May (twenty percentage points) and September (nineteen percentage points). Outside of the May to October period, an increase of twenty percentage points was recorded in the average unit occupancy rate for November in 2011 (40% compared to 20% in November 2011).

Please note that there was a decrease in the agency sample size in 2011 which will have impacted on occupancy rates. An agency supplying data for between 199 and 300 units did not submit forms in 2011 which is reflected in the occupancy results for this year when compared with 2010.

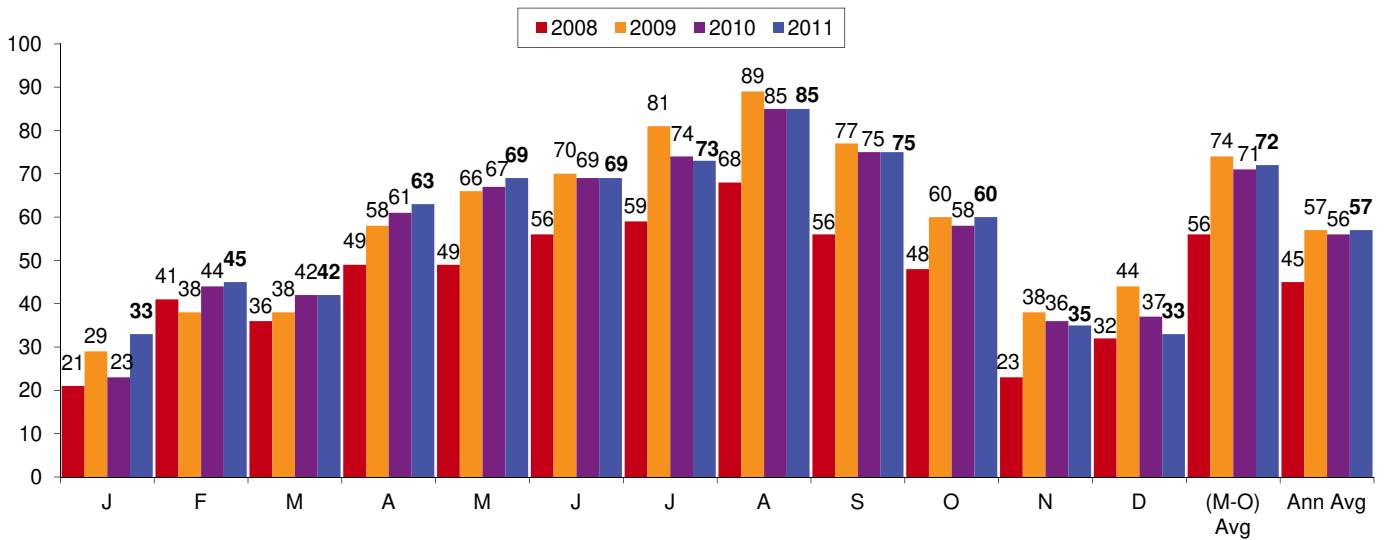
Regional Trends

This section of the report summarises the occupancy levels across the different regions of Wales for cottages and apartments. As there were no trended 2007 occupancy figures available for self-catering accommodation let by agencies, we have presented data for 2008 onwards, while occupancy figures for independent operators are presented from 2007 onwards. A chart below each table illustrates the occupancy figures for all properties for each region from 2008 to 2011.

Table 6-4 - Monthly Unit Occupancy – North Wales – Independent (%)

	Average Unit Occupancy				
	2007	2008	2009	2010	2011
January	25	25	31	23	31
February	45	42	40	44	42
March	42	45	38	39	31
April	59	47	53	61	62
May	73	61	71	68	68
June	83	70	74	73	62
July	90	76	85	78	72
August	92	85	88	86	87
September	77	72	82	73	75
October	63	52	68	57	55
November	37	25	38	31	24
December	40	38	38	36	30
<i>May – October average</i>	<i>80</i>	<i>69</i>	<i>78</i>	<i>72</i>	<i>70</i>
<i>Annual average</i>	<i>61</i>	<i>53</i>	<i>59</i>	<i>56</i>	<i>53</i>

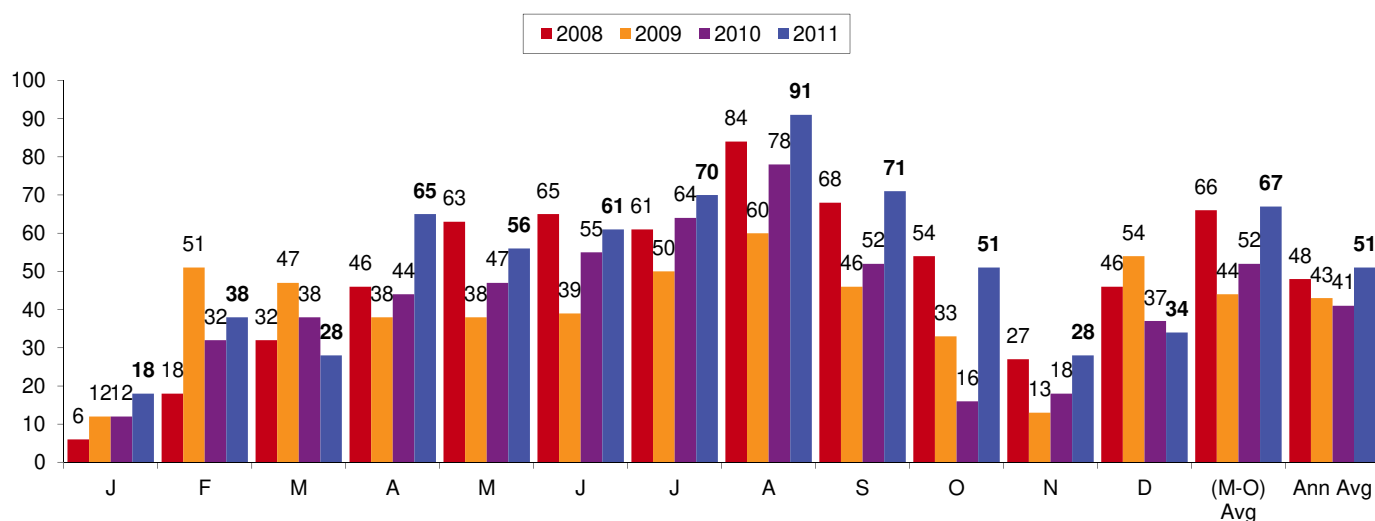
Figure 6-2 - Monthly Unit Occupancy – North Wales – 2008 - 2011 ALL (%)



The annual average unit occupancy rate for properties in North Wales was slightly higher in 2011 than in 2010 (57% and 56% respectively) and equal to that recorded for this region in 2009. There was a one percentage point increase in the May to October average between 2010 and 2011 (71% to 72%) with this figure remaining slightly lower than in 2009 (74%). Over the past four years, the average unit occupancy rates for January to April have risen overall, while rates recorded for the summer months of June and July have fallen over the past three years.

Table 6-5 - Monthly Unit Occupancy – Mid Wales – Independent (%)

	Average Unit Occupancy				
	2007	2008	2009	2010	2011
January	24	25	16	16	18
February	41	40	40	27	38
March	42	41	40	38	28
April	48	53	59	60	65
May	59	66	64	58	56
June	70	63	70	66	61
July	85	78	81	74	70
August	93	89	91	88	91
September	73	68	70	66	71
October	61	54	54	44	51
November	24	27	23	27	28
December	35	46	31	37	34
<i>May – October average</i>	<i>74</i>	<i>70</i>	<i>72</i>	<i>66</i>	<i>67</i>
<i>Annual average</i>	<i>55</i>	<i>54</i>	<i>53</i>	<i>50</i>	<i>51</i>

Figure 6-3 - Monthly Unit Occupancy – Mid Wales – 2008 - 2011 ALL (%)

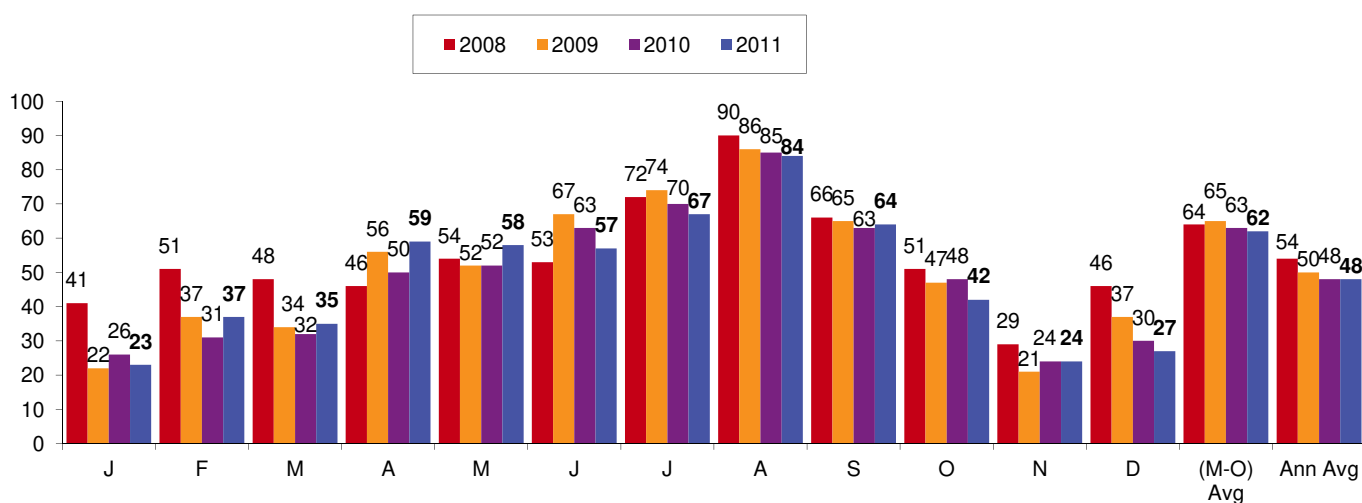
As in previous years, occupancy rates in Mid Wales varied considerably across the year in 2011. The January 2011 rate was 18%, a figure which rose to 91% in August before decreasing to 28% in November. As for the other regions, with the exception of North Wales, the December 2011 rate was higher than that recorded for the previous month, with an increase of six percentage points between November and December 2011 for Mid Wales. The May to October average continued to rise in 2011, with a rate of 67% (compared to 52% in 2010 and 44% in 2009), a similar rate to that recorded for this region in 2008 (66%). The decline in the annual average that was recorded between 2008 and 2010 (48% to 41%) did not continue in 2011, instead there was a rise of ten percentage points to 51% in 2011 for this region.

It should be noted that no data was available for self-catering properties let by agencies in the South East region during 2011 and the decrease in sample size influenced occupancy rates for this region in 2011.

Table 6-6 - Monthly Unit Occupancy – South Wales – Independent (%)

	Average Unit Occupancy				
	2007	2008	2009	2010	2011
January	19	18	22	26	23
February	37	38	37	31	37
March	44	41	34	32	35
April	51	46	56	50	59
May	69	59	52	52	59
June	72	64	67	63	57
July	82	74	74	70	67
August	94	90	86	85	84
September	67	66	65	63	64
October	57	51	47	48	42
November	34	29	21	24	24
December	41	46	37	30	27
<i>May – October average</i>	74	67	65	63	62
<i>Annual average</i>	56	52	50	48	48

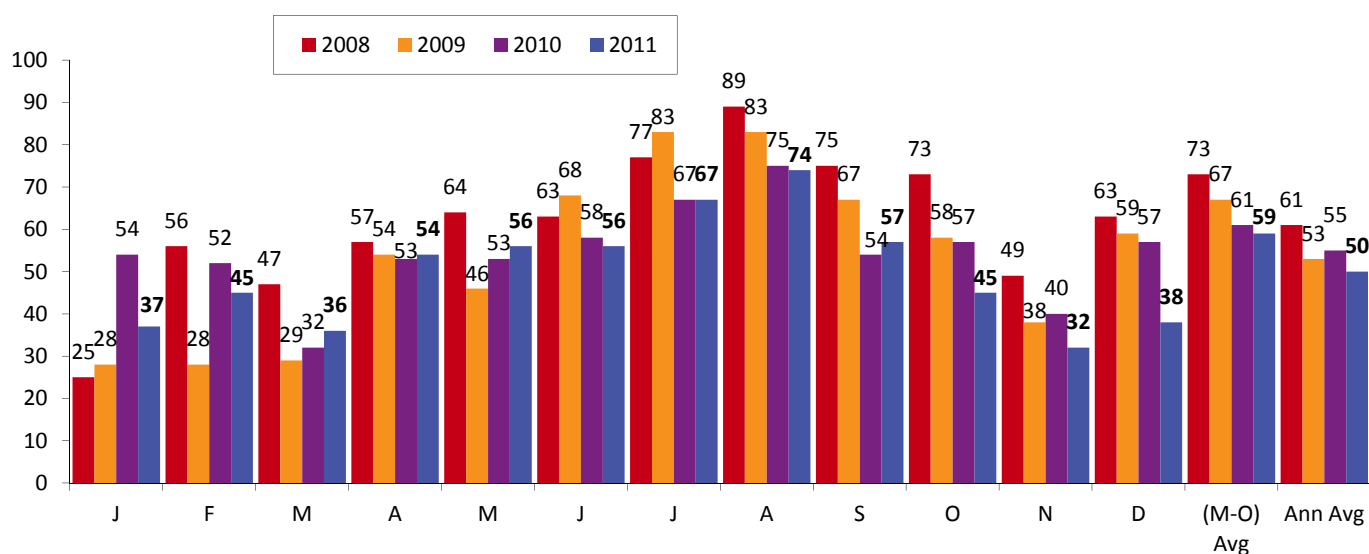
Figure 6-4 - Monthly Unit Occupancy – South Wales – 2008 - 2011 ALL (%)



The average unit occupancy rate for properties across South Wales rose from 23% in January to 84% in August, with rates of 24% in November and 27% in December 2011. Occupancy levels in South Wales have generally been fairly consistent over the past three years during the main summer season, with the May to October average in the range 62% - 65%. The average unit occupancy rate recorded in April 2011 was nine percentage points higher than that recorded for the same month in 2010 (59% and 50% respectively), reflecting the timing of the Easter Holiday period and an additional Bank Holiday due to the Royal Wedding. Since 2008, the average unit occupancy rate for August has fallen from 90% to 84%, while the rate for December has fallen by nineteen percentage points over this period of time.

Table 6-7 - Monthly Unit Occupancy – South East Wales – Independent (%)

	Average Unit Occupancy				
	2007	2008	2009	2010	2011
January	38	25	28	54	37
February	51	55	28	52	45
March	47	43	28	32	36
April	50	57	54	53	54
May	66	64	46	53	56
June	69	63	68	58	56
July	76	77	83	67	67
August	87	89	83	75	74
September	58	75	67	54	57
October	63	73	58	57	45
November	54	49	38	40	32
December	64	63	59	57	38
May – October average	-	73	67	61	59
Annual average	60	61	53	55	50

Figure 6-5 - Monthly Unit Occupancy – South East Wales – 2008 - 2011 ALL (%)

2011 began with an average unit occupancy rate of 37% in January in South East Wales, a rate which rose to 74% in August before falling to 32% in November. Rates for the South East have tended to be variable over the years, particularly during the months of January and February. Since 2008, the May to October average for South East Wales has fallen from 73% to 59%, with the most significant monthly decrease recorded for the month of August (89% in 2008 to 74% in 2011). The annual average in 2011 is the lowest recorded for this region since 2008.

It should be noted that no data was available for self-catering properties let by agencies in the South East region during 2011.

Table 6-8 - Monthly Unit Occupancy – South West Wales – Independent (%)

	Average Unit Occupancy				
	2007	2008	2009	2010	2011
January	13	16	20	16	17
February	33	32	40	25	34
March	43	40	36	32	34
April	51	44	56	50	61
May	70	58	53	52	59
June	73	64	67	64	58
July	84	74	73	70	66
August	96	90	86	87	87
September	70	64	65	65	67
October	55	44	44	45	41
November	28	22	17	20	21
December	34	39	29	24	24
<i>May – October average</i>	-	66	65	64	63
<i>Annual average</i>	54	49	49	46	48

Occupancy levels amongst all operators in South West Wales again demonstrated the seasonality of the sector, ranging from 17% in January to 87% in August before decreasing to 21% in November and 24% in December. The May to October average for this region has been in the range 63% - 65% since 2008, which demonstrates a fair degree of consistency between the years in the main tourist season for this region. Over the past three years, the months of August and September have shown the greatest consistency with monthly average unit occupancy rates in the range 86%-87% and 65%-67% respectively.

The annual average unit occupancy rate for 2011 (48%) was two percentage points higher than that recorded in 2010. This increase has largely been impacted by an increase of eleven percentage points between 2010 and 2011 for the month of April, a reflection of the timing of the Easter Holiday period and the additional Bank Holiday due to the Royal Wedding in 2011.

It should be noted that no data was available for self-catering properties let by agencies in the South West region during 2011.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for properties in coastal and inland locations. Table 6-9 below illustrates occupancy rates for independent operators along with trended 2007 to 2011 data.

Table 6-9 - Monthly Unit Occupancy by Location - Independent (%)

	Coastal locations Unit Occupancy (%)					Inland locations Unit Occupancy (%)				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
January	20	21	25	23	28	24	22	19	22	21
February	40	44	44	32	44	40	40	35	30	36
March	47	47	40	39	39	37	41	33	33	29
April	60	55	51	58	66	45	50	58	52	59
May	74	67	70	60	71	61	63	55	52	56
June	83	72	76	72	70	66	64	67	61	55
July	90	78	85	81	78	79	77	76	68	64
August	95	93	95	93	92	91	89	86	84	84
September	78	72	79	77	77	65	69	66	60	65
October	62	49	58	58	55	56	55	49	43	45
November	29	23	21	25	25	38	29	24	25	25
December	36	42	34	29	29	44	44	36	34	30
Annual Average	60	55	57	54	56	54	54	50	47	47

In 2011, independently let properties in coastal locations recorded a higher annual overseas occupancy rate than those located in inland areas (56% and 47% respectively). When analysed by month, the largest differences between coastal and inland average unit occupancy rates for independent properties were recorded for May and June (fifteen percentage points each). Inland properties, however, recorded a slightly higher average unit occupancy rate for December (30% compared to 29% amongst coastal properties).

Between 2010 and 2011, the annual average unit occupancy rate for independent operators with properties in coastal locations rose by two percentage points while the rate for inland remained static.

Table 6-10 - Monthly Unit Occupancy by Location - ALL (%)

	Coastal locations Unit Occupancy (%)				Inland locations Unit Occupancy (%)			
	2008	2009	2010	2011	2008	2009	2010	2011
January	21	24	23	28	24	21	23	24
February	44	43	33	44	41	36	34	41
March	47	40	39	39	42	35	36	36
April	55	51	58	66	49	60	55	61
May	66	70	60	71	60	60	56	63
June	72	76	72	70	64	67	62	62
July	78	85	81	78	74	76	69	70
August	93	95	93	92	86	87	83	82
September	72	79	77	77	67	69	63	67
October	49	58	58	55	50	50	45	47
November	23	21	25	25	24	28	28	29
December	42	34	29	29	39	41	35	31
Annual Average	55	56	54	56	52	52	49	51

As in previous years, the average unit occupancy rates for all properties located in coastal areas were higher than for inland properties for most months in 2011. The difference was most evident during the main tourist season, particularly during the months of August and September where the variation between coastal and inland occupancy rates was ten percentage points for each month. However, inland areas recorded higher occupancy rates in November and December 2011, a finding which again reflects results recorded in previous years.

Occupancy by Tariff

A new reporting element was introduced in 2008 for cottages and apartments - occupancy rates were analysed by the maximum weekly tariff charged during the month. Monthly unit occupancy rates for tariff analysed by independent/agency operators are detailed in Appendix 3a of the report. The annual average unit occupancy rates by tariff are presented in Table 6-11 below.

Properties in all of the tariff bands recorded similar annual average unit occupancy rates in 2011 of 49% - 50%. Table 6-11 below illustrates monthly occupancy rates across each tariff band. More details can be found under Appendix 3a.

Table 6-11 - Average Monthly Unit Occupancy by Tariff (%)

	Tariff			
	<£299.99	£300 -£499.99	£500 - £799.99	£800+
January	15	28	19	32
February	31	54	33	18
March	22	37	23	23
April	55	63	69	62
May	69	54	67	66
June	86	55	65	64
July	66	62	65	76
August	93*	80	88	92
September	59	67	72	58
October	37	49	47	46
November	24	24	15	26
December	27	23	26	26
Annual Average	49	50	49	49

*=sample <5

Properties charging £800 or more started the year with a higher January occupancy rate than those in the lower tariff bands, which may reflect higher tariffs over the New Year period. Units charging £300-£499.99 recorded higher average unit occupancy rates in March and April, as well as between September and November 2011, than those in the other tariff categories. The highest average unit occupancy rates in July and August 2011 were recorded by properties with a tariff of £800 or more (76% and 92% respectively).

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Table 6-12 below shows the annual average unit occupancy rates by grade.

With the exception of 2 star properties, which recorded the highest annual average unit occupancy for 2011 (65%), occupancy levels increased according to star grading. Properties with a 5 star grading recorded an annual average unit occupancy rate which was seven percentage points higher than those in the 3 star category (54% and 48% respectively). In previous years, the annual average for ungraded properties has been lower than that for graded properties, particularly those with a 5 star grading. However, this was not the case in 2011 with a rate of 55% recorded for ungraded properties.

Please note that no properties in this year's survey had a one star grading. Also, the sample size for 2 star properties is smaller than for the other categories, therefore, these results should be treated with a degree of caution and the ungraded sample is lower due to an operator with a large number of properties not returning data forms in 2011.

Table 6-12 - Average Monthly Unit Occupancy by Grading (%)

	Star Grading				
	Unit Occupancy (%)				
	2 Star	3 Star	4 Star	5 Star	Not graded
January	31	31	23	19	26
February	48	39	39	38	44
March	53	31	31	29	46
April	84	56	59	71	62
May	75	61	56	69	71
June	92	50	56	71	70
July	98	62	66	78	76
August	98	79	86	94	80
September	87	63	65	78	72
October	53	43	46	60	49
November	29	23	27	22	35
December	28	32	33	24	31
Annual Average	65	48	49	54	55

Table 6-12 above also provides a breakdown of monthly occupancy rates by grading. Average unit occupancy rates were highest for properties in the 2 star grading category for most months in 2011, with the difference between these properties and 5 star properties less marked during the months of August and September. Ungraded properties recorded higher monthly average unit occupancy rates than 5 star properties outside of the main tourist season, particularly in November with rates of 35% and 22% respectively. However, the reverse was true during the summer months, particularly in August 2011 where 5 star properties recorded an average unit occupancy rate of 94% compared to 80% amongst ungraded properties.

Caravan Holiday Homes and Chalets

In this section we report on the information collected from operators offering static caravans (and/or chalets) for let. Occupancy is measured by relating the number of units let during the reporting period to the total number available for let during that time.

Sample Size

Table 7-1 below details response levels to the survey throughout 2011 for the different accommodation types. It features the number which made a return to the survey each month and the number with units available for let which formed the sample for analysis. Operators whose properties were known to be closed during the winter months were not sent monthly forms, but were included in the response level calculations.

Table 7-1 – Sample Size – Caravan Holiday Homes

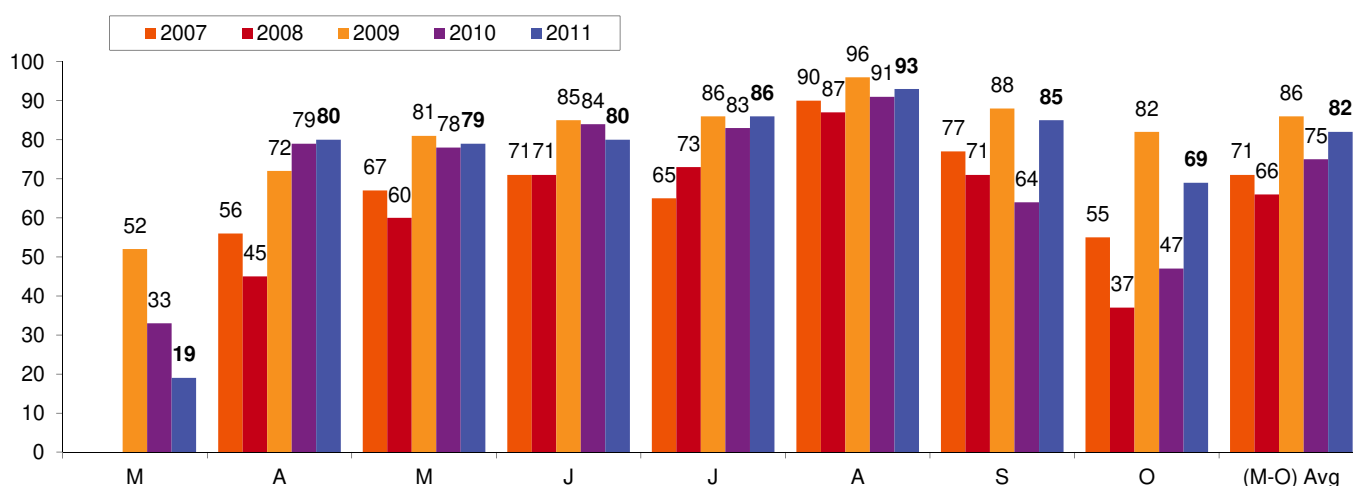
	Number of parks		
	Making Returns	Closed	Analysis Sample
January	N/A	N/A	N/A
February	N/A	N/A	N/A
March	30	11	19
April	23	0	23
May	23	1	23
June	23	0	23
July	25	0	25
August	25	0	25
September	27	0	27
October	37	3	23
November	N/A	N/A	N/A
December	N/A	N/A	N/A
Average	31	7	24

On average, 31 returned forms were received every month, providing an average sample size of 24 to analyse.

Monthly Unit Occupancy

Figure 7-1 below presents the occupancy rates for 2007 to 2011 for caravan holiday homes. As stated in the methodology section above, occupancy figures were collected in 2011 during March – October inclusive. Due to the low number of returned occupancy forms received in March in 2007 and 2008, monthly results have only been presented below for the April – October time period for these years.

Figure 7-1 - Monthly Unit Occupancy – Caravan Holiday Homes (%)



Between March and April 2011, the monthly unit occupancy for caravan holiday homes increased by sixty-one percentage points, highlighting the importance of the Easter Holiday period to this accommodation sector, as well as the additional Bank Holiday due to the Royal Wedding. Also, it is likely that a greater number of sites opened in April to take advantage of the Easter Holiday period and Bank Holiday. Between May and September, average monthly unit occupancy rates ranged from 79% - 93%, with the highest rate recorded in August.

At 82%, the May to October average for 2011 was seven percentage points higher than the 2010 rate of 75% and is the second highest rate recorded for this period since 2007. When analysed by month, following a decrease of twenty-two percentage points in September 2010, the average unit occupancy rate for this month rose by twenty percentage points in 2011 to 84%. The 2011 rate for October (69%) was twenty-two percentage points higher than for the same month in 2010, with a larger number of operators returning forms for this month in 2011.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for caravan holiday homes in coastal and inland locations. Table 7-2 below illustrates occupancy rates for caravan holiday homes in 2011 along with data for previous years, where available.

Table 7-2 - Monthly Unit Occupancy by Location – Caravan Holiday Homes (%)

	Coastal locations						Inland locations					
	Static Occupancy (%)						Static Occupancy (%)					
	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
March	*	*	*	56	37	19	*	*	*	*	27	18
April	62	57	52	74	81	84	58	50	24	46	46	43
May	57	67	63	83	81	83	57	59	48	57	37*	36
June	58	73	74	88	87	83	45	49	48	58	53	41
July	70	66	75	89	85	88	80	62	61	55	60	62
August	90	92	84	94	91	93	59	73	93	96	92	90
September	93	80	73	90	64	87	69	44	61	67	64	69
October	58	56	36	85	46	70	26	43	41	46	47*	58
May-Oct	68	72	68	88	76	84	56	55	59	63	59	59
Average												

*Sample <5

Please note that the sample size, particularly for holiday homes based in inland locations, is low so these results should be interpreted with caution. It is recommended that comparisons are made between the May to October average.

At 84%, the May to October 2011 average for caravan holiday homes in coastal locations is eight percentage points higher than that recorded in 2010 (76%) and the second highest recorded for properties in these locations since 2006. Sites in inland locations recorded a May to October average in 2011 that was equal to that recorded in 2010 (59%) and again, this is the second highest rate recorded for these properties since 2006.

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Due to the low sample size outside of the peak summer months of May – October; information has been presented below based on this overall time period. Results should be interpreted with a degree of caution due to the low sample size.

Table 7-3 below provides a breakdown of monthly occupancy rates by grade, as well as the May to October averages by size. The sample size for 1-3 star properties is too small to be reported

In previous years, ungraded caravan holiday homes have recorded a higher May to October average than those with a grading of 4 or 5 stars. However, in 2011, the annual average unit occupancy rate for 4-5 stars (66%) was two percentage points higher than the average recorded for ungraded properties (64%). The 4-5 star average remained equal with that recorded in 2010, however, the 2011 ungraded average is four percentage points lower than those recorded in 2010 (70%).

Due to the low sample size when analysed by grade, as in previous years, 4-5 star accommodation has been combined. Please note that no properties in this year's survey had a one or two star grading and just two properties had a three star grading.

Table 7-3 - Average Monthly Unit Occupancy by Grading – Caravan Holiday Homes (%)

	Unit Occupancy (%)	
	4-5 Star	Not graded
March	22	13
April	54	52
May	51	55
June	55	66
July	72	72
August	91	81
September	74	59
October	53	50
May – October Average	66	64

When analysed by month, sites with a 4-5 star grading recorded higher average unit occupancy rates for most months in 2011 compared to those with no star grading. The difference was largest in August (ten percentage points) and September (fifteen percentage points). However, ungraded sites recorded a monthly average unit occupancy rate of 66% in June 2011 compared to 55% amongst those with a 4-5 star grading.

Touring Caravans and Camping Parks

This section of the report features parks offering touring caravan and camping pitches. This element of the survey covered the months of March to October inclusive, reflecting the closure of the majority of the sites during the winter months.

Sample Size

Tables 8-1 below details response levels to the survey throughout 2011. It features the number of parks which made a return to the survey each month and the number with pitches available for let which formed the sample for analysis. Operators whose parks were known to be closed during the winter months were not sent monthly forms, but were included in the response level calculations.

Table 8-1 – Sample Size – Touring Caravan and Camping Parks

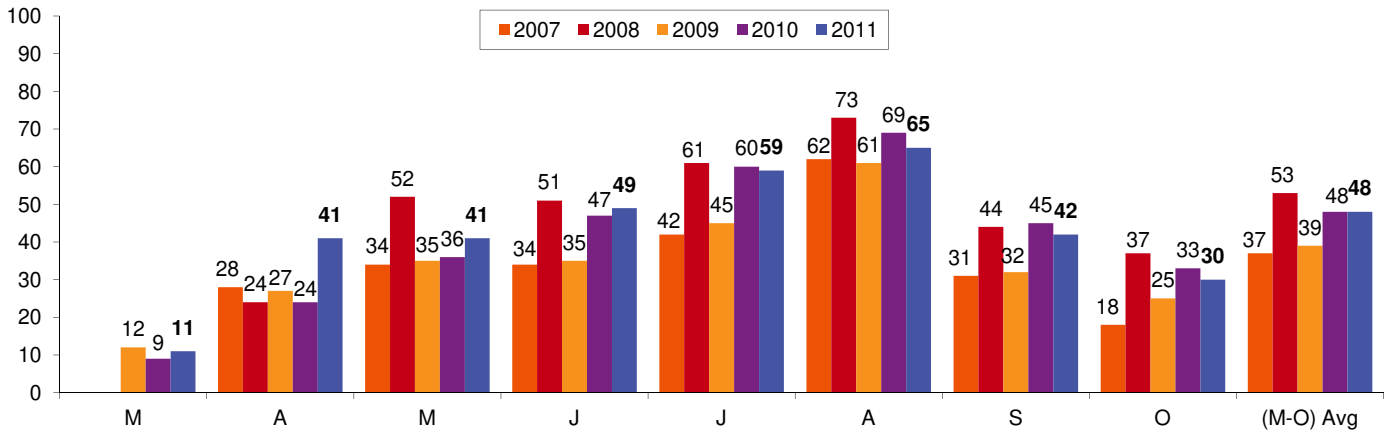
	Number of parks		
	Making Returns	Closed	Analysis Sample
January	N/A	N/A	N/A
February	N/A	N/A	N/A
March	43	17	26
April	60	0	60
May	62	0	62
June	60	0	60
July	65	0	65
August	62	0	62
September	59	0	59
October	56	4	52
November	N/A	N/A	N/A
December	N/A	N/A	N/A
Average	61	11	50

On average, 61 returned forms were received every month, providing an average sample size of 50 to analyse.

Monthly Unit Occupancy

Figure 8-1 below presents seasonal occupancy rates for 2011 for touring caravan and camping parks and where possible, results for 2007 to 2010. Due to the seasonality of this sector, very few returns were received outside of the main tourist season (April – October). Commentary and comparisons in this report are made across the season based on the column displaying May to October returns.

Figure 8-1 - Monthly Pitch Occupancy – Touring Caravan and Camping Parks (%)



Following a decrease in the May to October average between 2008 and 2009 (53% to 39%), an increase of nine percentage points was recorded in the 2010 average (48%), a rate which remained static in 2011. The relatively small sample sizes for this sector, along with possible survey variation between years, should be taken into account when comparing data.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for touring caravan and camping parks located in coastal and inland locations. Table 8-2 below illustrates occupancy rates for caravan holiday homes in 2011 along with trended 2006 - 2010 data.

Table 8-2 - Monthly Unit Occupancy by Location – Touring caravan and camping parks (%)

	Coastal locations						Inland locations					
	Touring Occupancy (%)						Touring Occupancy (%)					
	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
March	*	*	*	9	10	8	*	*	*	15	6	14
April	32	28	21	25	26	28	24	28	30	22	22	47
May	32	37	50	40	31	26	24	29	56	29	36	49
June	40	37	47	41	49	36	30	30	59	26	39	56
July	61	46	60	61	51	48	36	34	62	28	64	64
August	76	72	76	80	70	66	44	45	68	38	68	64
September	29	33	36	38	37	29	23	28	48	19	48	49
October	15	17	42	22	21	13	16	21	37	18	38	36
May-Oct												
Average	42	40	52	47	43	36	29	31	55	26	49	53

Please note that the sample size, particularly for touring caravans and camping parks based in coastal locations, is low so these results should be interpreted with caution.

The May to October average for sites in coastal areas in 2011 was 36%, a rate seven percentage points lower than the 2010 rate of 43% and the lowest recorded for this type of area since 2006. The May to October average for sites in inland areas, however, rose by four percentage points to 53% in 2011. The May to October average for these properties has been more varied over the years, with the 2010 rate of 49% twenty-three percentage points higher than the 2009 rate of 26% but six percentage points lower than the 2008 rate of 55%.

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of the Visit Wales Grading Scheme. Due to the low sample size outside of the peak summer months of May to October; information has been presented below based on this complete time period.

Table 8-3 below shows the annual average unit occupancy rates by grading and a monthly occupancy rates by grade.

As in previous years, within the Visit Wales grading scheme, there appeared to be a correlation between grading and occupancy levels in 2011 with the average for 4-5 star sites (56%) twenty-three percentage points higher than that for those with 2-3 stars (33%). Ungraded sites recorded a May to October average of 41%. Caution should be used when interpreting results due to the low sample size.

Please note that no properties in this year's survey had a one star grading.

Table 8-3 - Average Monthly Unit Occupancy by Grading (%)

	Star Grading		
	Unit Occupancy (%)		
	2-3 stars	4-5 stars	Not graded
March	24	4	10
April	28	46	39
May	30	47	37
June	30	60	47
July	50	67	50
August	50	76	49
September	24	51	37
October	14	34	38
May – Oct Average	33	56	41

NB: 2 star and 5 star sample <5

The largest difference between sites with a 4-5 star grading and those graded with 2-3 stars was recorded in June 2011, with average pitch occupancy rates of 60% and 30% respectively. Please take care when interpreting results due to the low sample size when analysed at this level.

Hostels and Bunkhouses

Sample Size

Table 9-1 details response levels to the survey throughout 2011 for these accommodation types. It features the number which made a return to the survey each month and the number available for booking which formed the sample for analysis. Operators whose properties were known to be closed during the winter months were not sent monthly forms, but were included in the response level calculations.

Table 9-1 –Sample Size – Hostels and Bunkhouses

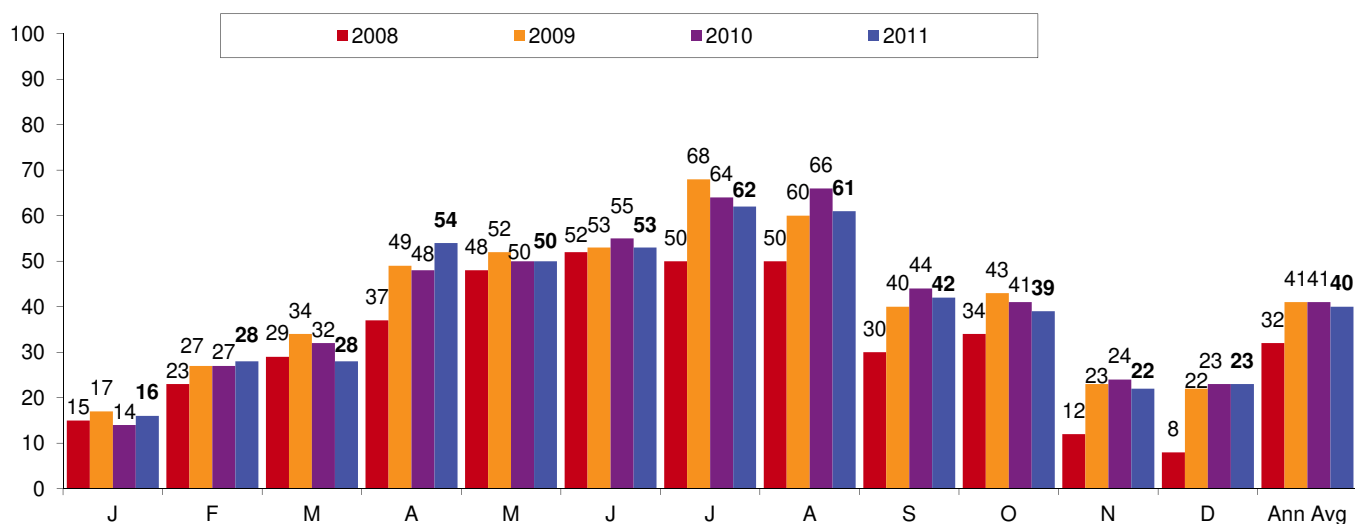
	Number of properties		
	Making Returns	Closed	Analysis Sample
January	35	4	31
February	34	2	32
March	34	1	33
April	34	0	34
May	33	0	33
June	34	0	34
July	32	0	32
August	35	1	34
September	33	1	32
October	30	0	30
November	33	0	33
December	33	1	32
Average	34	1	33

On average, 34 returned forms were received every month, providing an average sample size of 33 to analyse.

Monthly Bed Occupancy

Figure 9-1 below presents the monthly and annual bed occupancy for hostels and bunkhouses between 2008 and 2011.

Figure 9-1 - Monthly Bed Occupancy – Hostels and Bunkhouses – (%)



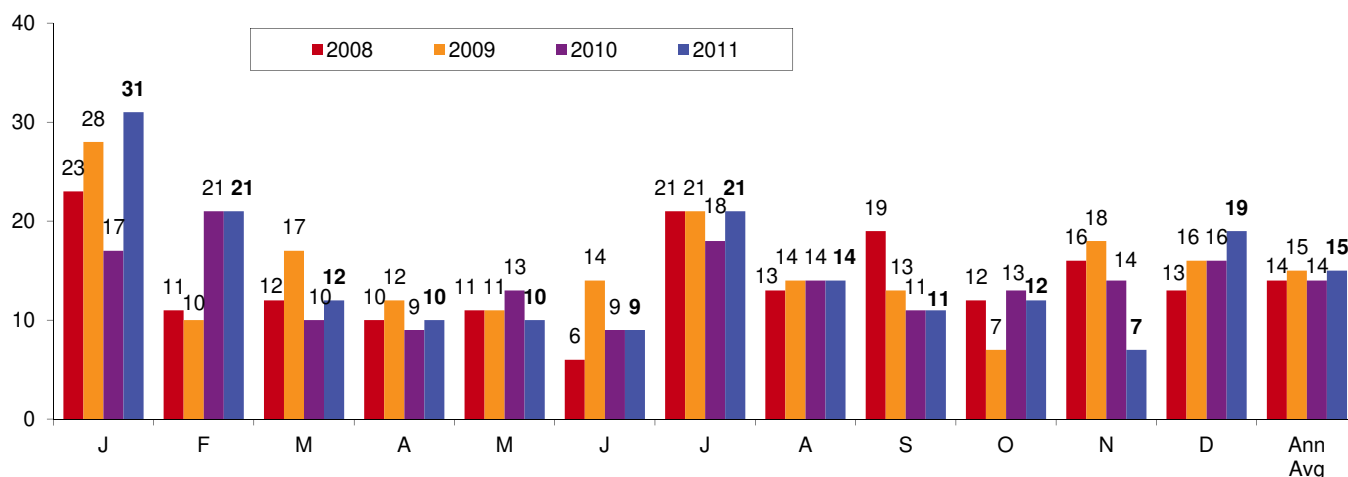
The monthly bed occupancy rate was 16% in January 2011. This figure rose to a peak of 62% in July before decreasing to 22% in November and 23% in December. As for other accommodation sectors, the impact of the Easter Holiday period and the additional Bank Holiday in April were evident, with an increase of twenty-six percentage points in the monthly bed occupancy rate for hostels and bunkhouses between March and April 2011 (28% and 54% respectively). Towards the end of the main summer season the monthly average bed occupancy rate declined significantly, with a decrease of nineteen percentage points between August (61%) and September (42%). The annual average for 2011 was 40%, a slight decrease on the 2009 and 2010 rates of 41%.

Over the last three years, the average bed occupancy rate for July has decreased year-on-year from 68% in 2009 to 64% in 2010 and 62% in 2011. The rate for August has been variable over the last few years, with an increase of ten percentage points between August 2008 and 2009 (50% to 60%), a further increase of six percentage points in 2010 for this month (66%) before a decrease of five percentage points in 2011 to 61%.

Overseas Occupancy

On the monthly occupancy form, hostel operators³ are asked to identify the number of guests staying in the hostel each night and their nationality; either UK or overseas. It should be noted that not all establishments provide this information – in 2011, 199 forms were received with overseas data (51%).

Figure 9-2 - Overseas Occupancy – Percentage of Bednights (%)



There was a fair degree of variation in the percentage of overseas bednights when analysed by month in 2011. The highest proportions were recorded in January (31%), February (21%), June (21%) and December (19%). The timing of the Easter Holiday period had less of an effect on overseas occupancy than the overall rate, with the April 2011 overseas occupancy rate slightly lower than in March of the same year (10% and 12% respectively). Overseas occupancy levels continue to be high in this accommodation sector, illustrating that Hostels are particularly popular with overseas visitors.

Since 2008, the greatest variations in the percentage of overseas bednights have been recorded for the months of January and February, months when fewer establishments tend to be open and therefore, the sample size is likely to be lower.

Please note that the percentage of overseas bednights refers to the number of nights spent by overseas guests as a percentage of the total number of bednights sold.

³ Bunkhouse operators are not asked to differentiate between UK and overseas guests.

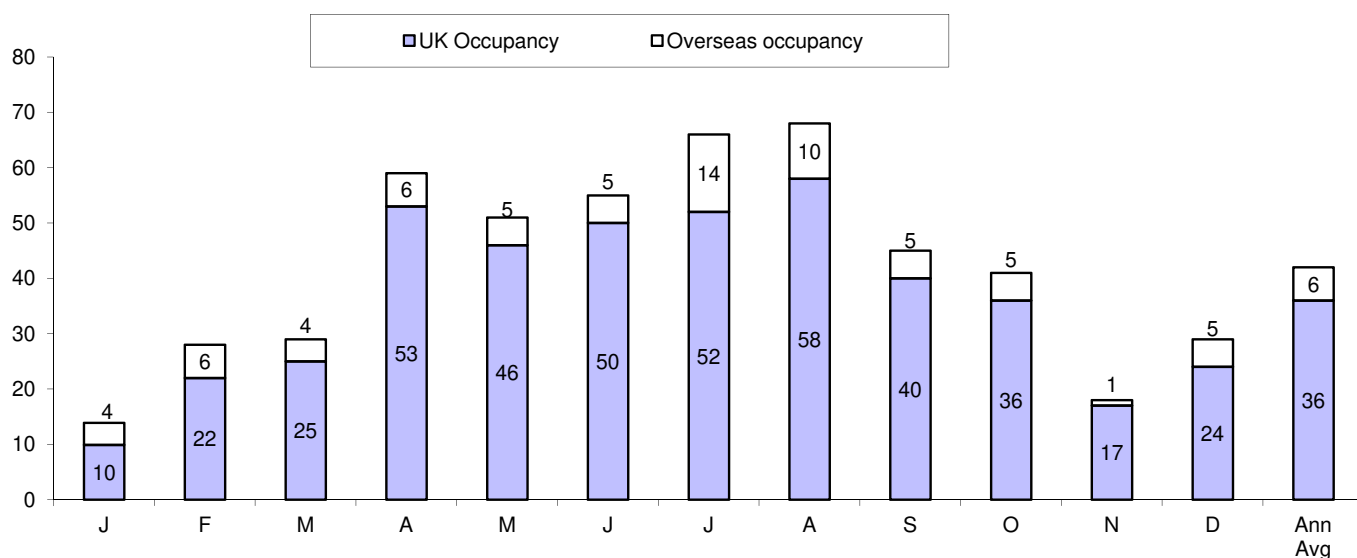
Figure 9-3 – Overseas and UK Monthly Bed Occupancy (%)

Figure 9-4 shows the monthly average bed occupancy rates for UK guests and Overseas guests. The UK monthly bed occupancy rates were higher for all months, with an annual average of 36% compared to 6% for overseas guests. Please note that overseas bed occupancy refers to the number of overseas bednights as a percentage of the total number of bedspaces available.

Occupancy by Location – Hostels

Occupancy data was analysed for hostels in coastal and inland locations. Table 9-2 below illustrates occupancy rates for hostels in the two locations.

Table 9-2 - Monthly Bed Occupancy by Location Hostels and Bunkhouses (%)

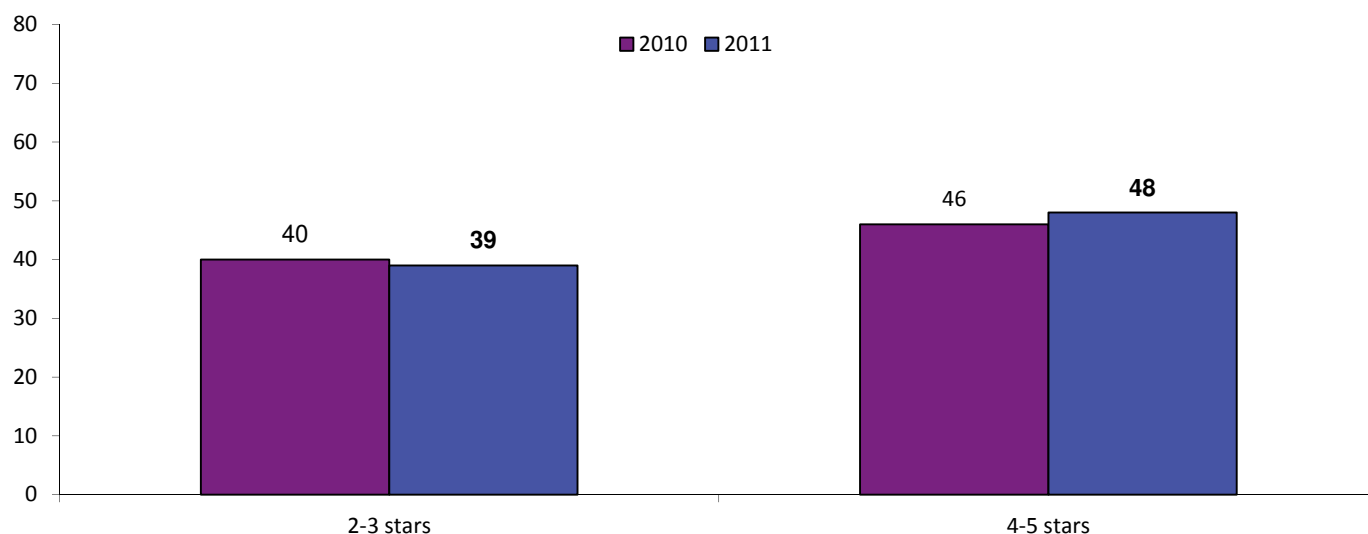
	Coastal locations	Inland locations
	Bed Occupancy (%)	Bed Occupancy (%)
January	18	15
February	26	28
March	24	30
April	56	52
May	54	48
June	54	52
July	67	60
August	71	56
September	43	42
October	39	39
November	21	22
December	18	27
May-Oct Average	55	49
Annual Average	41	39

Similar levels of occupancy were reported annually for both coastal and inland locations (41% and 39% respectively), with coastal establishments recording a slightly higher May and October average (55%) than inland establishments (49%). Please note that the sample is low and so this should be taken into account when analysing the results.

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Figure 9-5 below shows the annual average unit occupancy rates by grade.

Figure 9-4 - Annual Average Bed Occupancy by Grading – Hostels and Bunkhouses (%)



As with other accommodation sectors, there was a positive relationship between the level of grading and occupancy level for the Hostels sector in 2011. Establishments in the higher grading category recorded an annual average bed occupancy of 48%, nine percentage points higher than the rate recorded for those with a two or three star grading (39%). The annual average bed occupancy rates recorded in 2011 were similar to those recorded during the previous year, with a rate of 39% recorded for those with 2-3 stars in 2011 compared to 40% in 2010, while the 2011 4-5 star rate of 48% was two percentage points higher than that recorded for these establishments in 2010 (46%).

Please note that no properties in this year's survey had a 1 or 5 star grading. Also, caution should be used when interpreting the results due to the low sample size.

Appendix 1: Hotels

Appendix 1a - Hotels: Bed Occupancy – monthly averages (%)

	Bed occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
January	22	23	25	24	25	24	26	25	26	26	27
February	31	33	33	33	33	35	35	34	33	35	35
March	31	37	36	36	37	35	37	38	34	36	38
April	39	37	43	41	41	44	44	40	42	45	45
May	47	45	48	48	46	49	50	49	46	47	46
June	48	50	47	48	49	50	51	47	48	50	49
July	52	51	52	53	52	56	53	52	52	54	50
August	60	58	59	56	56	60	60	55	56	57	52
September	49	48	50	51	51	55	54	51	50	52	49
October	43	42	43	42	42	45	45	45	45	45	45
November	40	35	34	35	34	37	38	38	36	35	38
December	32	30	31	33	32	34	34	33	34	29	31
Annual Average	41	41	42	42	42	44	44	43	42	43	42

Appendix 1b – Hotels: Bed Occupancy 2011 (%)

	2011 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	27	35	38	45	46	49	50	52	49	45	38	31	42
North Wales	27	37	42	50	51	56	60	65	57	51	41	35	48
Mid Wales	24	31	33	43	43	46	51	56	55	46	37	26	41
South Wales	27	35	37	42	43	44	43	44	43	41	35	29	39
South East Wales	29	36	38	41	42	42	39	39	41	41	37	32	38
South West Wales	23	32	35	48	48	53	55	62	47	40	30	21	41
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	22	38	36	45	41	49	53	62	52	45	32	33	43
11-25 rooms	25	30	34	45	46	50	54	59	50	45	35	27	42
26-50 rooms	27	37	36	44	44	46	49	49	48	41	35	36	41
51-100 rooms	28	35	42	48	46	49	48	53	48	45	45	30	43
Over 100 rooms	30	38	43	44	51	49	50	46	49	48	39	30	44
Under £20	-	-	-	-	*	-	-	-	-	-	*	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	15	13	28	32	40	41	33	37	37	38	35	26	32
£40-£49.99	24	31	41	49	48	55	58	59	55	51	34	28	45
£50-£59.99	31	43	45	46	46	48	52	51	58	54	54	36	47
£60 & over	28	36	38	45	46	49	50	53	48	44	37	31	42
Not graded	26	31	33	40	42	46	46	45	43	43	37	32	40
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	38	48	56	45	43	46	46	46	57	50	54	41	47
3 stars	23	32	37	42	45	48	49	52	48	43	36	28	40
4 stars	28	38	40	52	47	51	52	60	47	44	38	35	44
5 stars	42	52	45	57	59	69	68	76	62	60	38	50	57
City/large town	34	42	41	44	45	44	43	41	45	44	38	33	41
Countryside/village	26	34	37	45	45	50	53	55	52	46	34	30	43
Seaside	25	35	40	50	47	53	56	63	53	47	42	31	45
Small town	20	31	33	38	44	47	44	46	46	43	36	27	38

* Sample size too small to undertake an analysis

- No returns received

Appendix 1c - Hotels: Room Occupancy 2011 (%)

	2011 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	40	53	56	61	64	68	69	67	68	61	56	44	59
North Wales	38	51	55	62	64	71	75	76	73	63	58	46	61
Mid Wales	32	42	45	57	55	62	67	67	68	57	50	33	54
South Wales	43	56	59	61	65	67	66	61	65	61	57	45	59
South East Wales	46	61	62	63	66	67	66	60	66	65	61	50	61
South West Wales	35	43	47	52	61	64	68	68	62	49	43	27	51
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	30	46	45	53	56	60	66	69	60	50	44	40	52
11-25 rooms	39	44	44	54	57	66	67	68	64	56	50	37	54
26-50 rooms	37	51	49	57	60	65	67	65	66	57	51	49	56
51-100 rooms	44	57	68	71	67	74	72	72	70	67	68	45	65
Over 100 rooms	45	60	65	62	72	67	71	65	72	67	62	47	63
Under £20	-	-	-	-	-	-	-	-	-	-	*	-	-
£20-£29.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£30-£39.99	19	21	41	50	51	55	60	44	48	53	58	37	45
£40-£49.99	36	44	56	61	63	71	71	72	75	64	45	39	59
£50-£59.99	43	57	54	63	64	71	68	61	72	64	65	46	60
£60 & over	45	55	58	62	65	68	70	68	68	62	57	45	60
Not graded	38	47	49	53	56	62	63	55	58	59	58	43	54
1 star	-	-	-	-	-	-	-	-	-	-	-	-	-
2 stars	45	59	72	65	64	75	69	61	73	64	68	53	64
3 stars	36	50	54	60	64	68	69	69	68	59	54	39	57
4 stars	44	57	56	62	65	72	69	73	68	58	55	48	60
5 stars	58	70	67	71	74	69	84	85	79	75	64	75	73
City/large town	48	63	65	61	68	65	66	60	69	66	62	51	62
Countryside/village	37	46	49	55	58	66	67	67	65	54	48	39	55
Seaside	35	49	54	65	62	70	73	74	68	60	58	41	59
Small town	38	56	52	64	69	73	74	67	73	66	55	41	60

* Sample size too small to undertake an analysis

- No returns received

Appendix 2: Guest Houses and Bed & Breakfasts

Appendix 2a – Guest houses/bed and breakfasts: Trends in Bed Occupancy Rates – Monthly Averages (%)

	Bed occupancy										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
January	10	15	13	14	17	12	12	11	13	10	10
February	15	19	20	21	21	20	20	18	18	17	16
March	9	27	23	21	27	20	21	24	20	20	19
April	20	25	37	36	30	35	33	25	31	31	33
May	29	36	43	41	39	41	40	38	37	34	33
June	32	48	41	47	47	46	43	36	39	40	39
July	44	51	50	54	53	56	47	45	46	42	43
August	54	62	63	64	64	62	57	52	51	47	53
September	34	43	42	46	48	45	43	38	41	39	38
October	25	32	30	34	33	32	31	30	30	31	16
November	16	22	21	20	17	19	20	17	18	18	25
December	12	17	17	18	14	19	15	15	15	13	10
Annual											
Average	26	34	34	35	35	34	33	29	30	29	28

Appendix 2b – Guest houses/bed and breakfasts: Bed Occupancy 2011 (%)

	2011 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	10	16	19	33	33	39	43	53	38	25	16	10	28
North Wales	10	12	18	38	34	43	45	57	38	28	16	13	30
Mid Wales	13	13	16	28	29	34	41	48	38	26	18	9	26
South Wales	8	20	22	32	34	39	43	53	38	23	14	10	29
South East Wales	11	19	15	21	23	26	33	37	22	16	11	10	20
South West Wales	6	21	26	39	41	47	48	63	49	28	15	10	34
1-3 rooms	7	13	14	27	28	30	37	44	32	20	11	8	23
4-10 rooms	11	17	21	36	35	43	45	56	40	27	17	11	31
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	9	14	18	21	23	22	26	30	20	13	10	7	19
£30-£39.99	11	17	19	35	34	40	46	57	42	26	18	10	30
£40-£49.99	6	17	19	29	36	42	46	51	34	27	14	12	29
£50-£59.99	*	*	*	*	*	49	*	*	*	*	*	*	*
£60 & over	*	*	26	38	31	41	*	58	38	27	*	8	29
Not graded	*	*	11	14	16	18	28	38	24	*	*	*	18
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	-	*	*	*	*	-	-	-	-	-	-	-	*
3 stars	12	13	14	25	26	28	32	46	31	17	15	10	23
4 stars	8	19	21	40	40	48	52	58	44	31	14	11	33
5 stars	10	14	25	34	33	45	47	60	41	29	17	11	30
City/large town	*	*	*	*	*	*	*	*	*	*	*	*	*
Countryside/village	8	16	19	34	32	36	41	49	38	24	14	10	27
Seaside	9	14	22	35	37	50	52	69	46	28	13	9	35
Small town	18	16	14	31	37	45	53	55	41	29	26	15	33

* Sample size too small to undertake an analysis

- No returns received

Appendix 2c – Guest houses/bed and breakfasts: Room Occupancy 2011 (%)

	2011 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	13	19	24	39	41	49	50	59	45	29	19	13	34
North Wales	13	18	23	43	41	49	51	62	49	32	20	17	35
Mid Wales	17	21	23	36	37	44	50	60	49	35	28	12	34
South Wales	10	19	25	37	44	51	48	56	40	23	14	10	32
South East Wales	15	18	18	26	33	38	40	46	26	15	14	12	25
South West Wales	8	20	29	45	51	59	54	62	49	30	14	9	37
1-3 rooms	10	17	18	31	34	38	44	51	37	24	14	10	27
4-10 rooms	15	21	27	43	45	54	51	62	49	32	21	14	37
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	11	17	25	30	28	30	33	42	31	15	15	10	24
£30-£39.99	14	21	23	42	44	53	53	61	48	30	22	13	35
£40-£49.99	9	14	19	34	44	53	55	61	44	32	18	14	35
£50-£59.99	*	*	*	*	*	55	*	*	*	*	*	*	*
£60 & over	*	*	37	40	37	44	*	64	48	36	*	11	34
Not graded	*	*	14	16	23	26	32	46	29	*	*	*	24
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	-	*	*	*	*	-	-	-	-	-	-	-	*
3 stars	17	19	20	35	37	42	43	51	44	27	24	14	31
4 stars	10	21	24	44	47	57	56	64	47	28	15	12	36
5 stars	15	18	34	37	39	47	54	66	48	35	21	14	35
City/large town	*	*	*	*	*	*	*	*	*	*	*	*	*
Countryside/village	11	20	22	39	39	43	44	52	41	25	15	11	30
Seaside	14	19	30	40	45	62	61	76	59	35	18	15	42
Small town	22	21	24	46	51	60	65	67	61	45	35	21	44

* Sample size too small to undertake an analysis

- No returns received

Appendix 3: Self Catering Accommodation

Appendix 3a – Independent Self Catering Cottages and Apartments Averages (%)

	<=£299.99		£300 - £499.99	
	Unit Occ (%)	Sample	Unit Occ (%)	Sample
January	15.3	40	27.9	74
February	31.3	45	53.6	58
March	21.8	54	37.2	77
April	54.5	13	63.4	74
May	68.9	15	53.9	66
June	86.2	9	54.6	82
July	65.8	5	61.7	46
August	92.6	3	80.0	48
September	59.4	16	67.1	97
October	37.0	21	48.6	103
November	23.7	53	23.9	75
December	26.6	14	22.9	39
<i>May-Oct Average</i>	<i>68.3</i>	<i>12</i>	<i>61.0</i>	<i>74</i>
<i>Apr-Oct Average</i>	<i>66.3</i>	<i>12</i>	<i>61.3</i>	<i>74</i>
<i>Jan-Dec Average</i>	<i>48.6</i>	<i>24</i>	<i>49.55</i>	<i>70</i>

	£500 - £799.99		£800 +	
	Unit Occ (%)	Sample	Unit Occ (%)	Sample
January	18.9	19	32.0	7
February	32.5	33	17.8	10
March	23.4	32	23.3	6
April	68.6	60	61.6	17
May	66.7	52	65.6	40
June	65.0	61	63.5	33
July	65.4	69	75.8	59
August	88.2	69	92.3	64
September	71.8	61	58.5	16
October	46.9	51	46.3	20
November	14.8	22	26.3	5
December	25.7	65	26.4	40
<i>May-Oct Average</i>	<i>67.3</i>	<i>61</i>	<i>67.0</i>	<i>39</i>
<i>Apr-Oct Average</i>	<i>67.5</i>	<i>60</i>	<i>66.2</i>	<i>36</i>
<i>Jan-Dec Average</i>	<i>49.0</i>	<i>50</i>	<i>49.1</i>	<i>26</i>

Appendix 4: Methodology

Hotel and Guest House/Bed and Breakfast survey methodology

Replicating the methodology used in previous years, the survey of hotels, guest houses and bed and breakfast establishments is a monthly survey of a panel of establishments located throughout Wales. At the beginning of each month, those who agreed to participate in the survey received a monthly occupancy form which they were asked to complete and return to TNS for analysis at the end of each month. The occupancy form asked operators to record on a daily basis:

- the number of UK and overseas guests staying overnight;
- the number of guests on business;
- the number of rooms occupied;
- the number of bedspaces and rooms available.

At the end of the year, the analysis of the survey data was re-run, thus enabling the inclusion of any late returns. The figures in this section of the report are based on the annual re-run and therefore may vary from those initially produced in the monthly summaries. In order to compensate for the differing levels of response by types of establishments, during the analysis stage, the data was weighted by the number of rooms at the regional level and by size of establishment.

The main measures referred to in the report are *bed and room occupancy*.

Bed occupancy rates refer to the proportion of all bedspaces available at any given time that are occupied by paying guests. In calculating these figures, the total number of bedspaces available is allowed to vary over the season to take account of any changes in the number of beds offered by individual hotels and guest accommodation through the use of extra beds, or the withdrawal of some rooms from use.

Room occupancy refers to the proportion of rooms available at any given time that are occupied by at least one paying guest. These rates differ from bed occupancy rates in that the room may be occupied whilst all the bedspaces in the room are not.

The table below illustrates how the bed and room occupancy rates are calculated.

Bed occupancy rate =	$\frac{\text{Total number of bedspaces occupied}}{\text{Total number of bedspaces available}} \times 100$
Room occupancy rate =	$\frac{\text{Total number of bedrooms occupied}}{\text{Total number of bedrooms available}} \times 100$

Self-catering cottages and apartments methodology

From 2009, the self catering element of the survey has covered a full twelve months' period. Self-catering operators were given the option of completing their forms on a daily or monthly basis. Months can be based on four, or five weeks, depending on the number of Saturdays that fall into a particular month.

Occupancy figures for the other types of self catering accommodation – touring caravan and camping parks, static parks and hostels – were collected on a daily basis, and results relate to the calendar month.

At the start of each month, operators on the survey panel were sent an occupancy form. They were asked to record, for each property, on a daily basis: whether the property is off-hire, booked or available; and the maximum weekly rental charged during the four or five week survey period. The form was returned to TNS for analysis at the end of the month. The analysis was re-run at the end of the year, thus allowing the inclusion of any late returns. The figures in this section of the report are based on the annual re-run and therefore may vary from those initially produced in the monthly summaries.

The table below illustrates how the unit occupancy rates are calculated.

Unit occupancy rate =	$\frac{\text{Total number of units occupied}}{\text{Total number of units available}} \times 100$
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Caravan holiday homes and chalets methodology

Reflecting the seasonality of this type of accommodation, since 2009, operators have been asked to provide data from March – October inclusive (in 2008, the static caravan holiday homes covered a full twelve months' period).

Occupancy figures for static caravans were collected on a daily basis and results relate to the calendar month. At the start of each month, operators on the survey panel were sent an occupancy form. They were asked to record the number of static caravans and chalets available per night and on a daily basis, the number that were let (for caravans and chalets separately). The form was returned to TNS for analysis at the end of the month. The analysis was re-run at the end of the year, thus allowing the inclusion of any late returns. The figures in this section of the report are based on the annual re-run and therefore may vary from those initially produced in the monthly summaries.

The table below illustrates how the pitch occupancy rates are calculated.

Pitch occupancy rate =	Total number of pitches occupied	X 100
	Total number of pitches available	

Touring caravan and camping parks methodology

As with caravan holiday homes and chalets, reflecting the seasonality of this type of accommodation, operators have been asked to provide data from March – October inclusive since 2009 (in 2008, this sector also covered a full twelve months' period).

Occupancy figures for this survey were collected on a daily basis and results relate to the calendar month. At the start of each month, operators on the survey panel were sent an occupancy form. They were asked to record the number of caravans and tent pitches available per night and on a daily basis, the number that are let (caravan and tent pitches separately). The form was returned to TNS for analysis at the end of the month. The analysis was re-run at the end of the year, thus allowing the inclusion of any late returns. The figures in this section of the report are based on the annual re-run and therefore may vary from those initially produced in the monthly summaries.

The table below illustrates how the pitch occupancy rates are calculated.

Pitch occupancy rate =	Total number of pitches occupied	X 100
	Total number of pitches available	

Hostels and bunkhouses methodology

The methodology used for the hostels and bunkhouses survey is similar to that for hotels, guest houses and bed and breakfast establishments. Participating establishments received an occupancy form at the start of each month on which they were asked to record, on a daily basis, the total number of guests staying; and the number of bedspaces available. Unlike hotels, due to the existence of dormitory style accommodation, hostel operators were not asked how many rooms are occupied.

Hostels were also asked to record whether the guests are from the UK or overseas. Bunkhouses were asked to record, for each day, the total number of guests with no UK or overseas split. However, they were also asked to indicate any day on which the entire establishment was booked by a group. In this case, the number of guests is taken to be the maximum possible.

The completed forms were returned to TNS for analysis at the end of the month. At the end of the year, the analysis of the survey data was re-run, thus enabling the inclusion of any late returns. The

figures in this section of the report are based on the annual re-run and therefore may vary from those initially produced in the monthly summary sheets.

The table below illustrates how the bed occupancy rates are calculated.

Bed occupancy rate =	$\frac{\text{Total number of bedspaces occupied}}{\text{Total number of bedspaces available}}$	X 100
-----------------------------	--	--------------

Trended Results – non-serviced accommodation

Comparative figures from 2006 and 2007 (when the survey was conducted by a different contractor) have been presented throughout the section where available and appropriate. A fundamental change to the analysis of independent operators within the self catering sector was made by the agency responsible for the survey up until 2007. From 2006 onwards, only when a facility was available to hire was the data reported on. Prior to this, levels of occupancy did not officially take availability into account and periods where facilities were unavailable to the paying public were variously classified by individual operators. For consistency, we have therefore only provided trended analysis of historical occupancy levels from 2006 onwards ensuring that the figures analysed are methodologically consistent. For simplicity and where appropriate, we have applied this trended guideline to all self catering segments.

It should be noted however that trended results should be interpreted with a degree of caution. Although every effort is made to ensure consistency across the survey, an element of survey variation can exist when a long running survey is transferred between two agencies.

Regional Occupancy Rates

The table below provides a definition of the regions used in Wales on the occupancy survey.

<i>North Wales:</i>	Anglesey, northern part of Gwynedd (Caernarfonshire), Conwy, Denbighshire, Flintshire and Wrexham.
<i>Mid Wales:</i>	Ceredigion, Powys and southern part of Gwynedd (Meirionnydd).
<i>South Wales:</i>	Bridgend, Vale of Glamorgan, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, Newport, Cardiff, Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot.
<i>South East Wales:</i>	Bridgend, Vale of Glamorgan, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, Newport, Cardiff.
<i>South West Wales:</i>	Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot.

Weighting

Data for both the serviced and self-catering surveys has been weighted according to data supplied by Visit Wales. The serviced data is weighted by 2007 bedstock data on the basis of area (North, Mid and South) and establishment size i.e. number of rooms (1-3, 4-10, 11-25, 26-50, 51-100, 101 or more). Returns for self-catering properties are reported in the form of weighted percentages - the weighting being on the basis of the number of units / properties each operator has available to let within Wales during the holiday season relative to the known universe in 2005. Data for the touring caravan and camping parks and hostels and bunkhouses surveys is not weighted.

Margins of error

Due to the nature of the samples for these surveys, which are self-selecting and therefore, not truly random, it is not possible to calculate statistical margins of error for the data from these surveys.

Appendix 5: Monthly Forms

SERVICED ACCOMMODATION OCCUPANCY SURVEY

Month:

Previous Code:

Code:

ESTABLISHMENT INFORMATION

(Please update information for this month):

Number of rooms available:

Number of guests you can accommodate:

Max charge this month for 1 person sharing dbl/twin room for B&B (inc VAT):

If closed all month, please tick:
(remainder of form need not be completed)

NOTES ON COMPLETING THE FORM

Please update the information alongside for this month if necessary.

When giving daily figures, it is not necessary for you to calculate the totals for the month unless you wish to do so. If daily information is unavailable, please enter the monthly totals in the bottom row.

If you cannot provide separate figures for UK and Overseas guests, please leave these columns blank and complete the blue "Total" columns.

Extra beds and rooms are any used in excess of your normal capacity. Please add extra rooms/beds used to the "Total capacity" columns. Similarly, if any rooms/beds were out of use on any day, please edit these columns accordingly.

Please exclude babies in cots from your figures.

Date	If closed, please tick box in relevant row(s)	Number of guests staying overnight			Number of bedrooms occupied	Total capacity (including any extra rooms/beds used)		Number of business (non-leisure) guests
		UK	Overseas	Total		Rooms	Bedspaces	
Sat 0 Jan	Closed <input type="checkbox"/>							
Sun 1 Jan	Closed <input type="checkbox"/>							
Mon 2 Jan	Closed <input type="checkbox"/>							
Tue 3 Jan	Closed <input type="checkbox"/>							
Wed 4 Jan	Closed <input type="checkbox"/>							
Thu 5 Jan	Closed <input type="checkbox"/>							
Fri 6 Jan	Closed <input type="checkbox"/>							
Sat 7 Jan	Closed <input type="checkbox"/>							
Sun 8 Jan	Closed <input type="checkbox"/>							
Mon 9 Jan	Closed <input type="checkbox"/>							
Tue 10 Jan	Closed <input type="checkbox"/>							
Wed 11 Jan	Closed <input type="checkbox"/>							
Thu 12 Jan	Closed <input type="checkbox"/>							
Fri 13 Jan	Closed <input type="checkbox"/>							
Sat 14 Jan	Closed <input type="checkbox"/>							
Sun 15 Jan	Closed <input type="checkbox"/>							
Mon 16 Jan	Closed <input type="checkbox"/>							
Tue 17 Jan	Closed <input type="checkbox"/>							
Wed 18 Jan	Closed <input type="checkbox"/>							
Thu 19 Jan	Closed <input type="checkbox"/>							
Fri 20 Jan	Closed <input type="checkbox"/>							
Sat 21 Jan	Closed <input type="checkbox"/>							
Sun 22 Jan	Closed <input type="checkbox"/>							
Mon 23 Jan	Closed <input type="checkbox"/>							
Tue 24 Jan	Closed <input type="checkbox"/>							
Wed 25 Jan	Closed <input type="checkbox"/>							
Thu 26 Jan	Closed <input type="checkbox"/>							
Fri 27 Jan	Closed <input type="checkbox"/>							
Sat 28 Jan	Closed <input type="checkbox"/>							
Sun 29 Jan	Closed <input type="checkbox"/>							
Mon 30 Jan	Closed <input type="checkbox"/>							
Totals								

PLEASE RETURN THE COMPLETED FORM BY

TNS Travel & Tourism
23 Alva Street
Edinburgh
EH2 4PS

Tel: 0131 243 3900
Fax: 0131 243 3998
Email: occsurvey@tns-global.com

OFFICE USE	218816 seroccfm
I/P	
Ver	

JANUARY 2011

Establishment Code

WSC0000

Individual Unit Reference
Max weekly rental this month

	<u>Property 1</u>			<u>Property 2</u>			<u>Property 3</u>			<u>Property 4</u>		
	£			£			£			£		
	<i>Please tick relevant column below for each day</i>			<i>Please tick relevant column below for each day</i>			<i>Please tick relevant column below for each day</i>			<i>Please tick relevant column below for each day</i>		
	Off-Hire	Booked	Available, not booked	Off-Hire	Booked	Available, not booked	Off-Hire	Booked	Available, not booked	Off-Hire	Booked	Available, not booked
Sat 1 Jan 2011												
Sun 2 Jan 2011												
Mon 3 Jan 2011												
Tue 4 Jan 2011												
Wed 5 Jan 2011												
Thu 6 Jan 2011												
Fri 7 Jan 2011												
Sat 8 Jan 2011												
Sun 9 Jan 2011												
Mon 10 Jan 2011												
Tue 11 Jan 2011												
Wed 12 Jan 2011												
Thu 13 Jan 2011												
Fri 14 Jan 2011												
Sat 15 Jan 2011												
Sun 16 Jan 2011												
Mon 17 Jan 2011												
Tue 18 Jan 2011												
Wed 19 Jan 2011												
Thu 20 Jan 2011												
Fri 21 Jan 2011												
Sat 22 Jan 2011												
Sun 23 Jan 2011												
Mon 24 Jan 2011												
Tue 25 Jan 2011												
Wed 26 Jan 2011												
Thu 27 Jan 2011												
Fri 28 Jan 2011												
Sat 29 Jan 2011												
Sun 30 Jan 2011												
Mon 31 Jan 2011												
Tue 1 Feb 2011												
Wed 2 Feb 2011												
Thu 3 Feb 2011												
Fri 4 Feb 2011												
Total Days												

Reasons for any units off-hire:

- Refurbishment/ decoration
- Self booked
- Other (please specify)

PLEASE RETURN THE COMPLETED FORM BY 12 FEBRUARY 2011

TNS Travel & Tourism, 19 Atholl Crescent, Edinburgh EH3 8HQ TEL: 0131 656 4000 FAX: 0131 656 4001

OFFICE USE	218816 SC OccFm
I/P:	Ver:

2011

2011

Establishment Code

Côd Sefydlu

	Caravan Holiday Homes <i>Carafannau sefydlog</i>	Chalets <i>Siales</i>	Caravans/motorhomes <i>Carafannau teithiol/Carafannau modur</i>	Tents <i>Safleoedd pebyll</i>
No of units/pitches available to let per night: <i>Nifer o unedau/safleoedd ar gael y nos:</i>	<input type="text"/> Units <i>Unedau</i>	<input type="text"/> Units <i>Unedau</i>	<input type="text"/> Pitches <i>Safleoedd</i>	<input type="text"/> Pitches <i>Safleoedd</i>
Maximum tariff this month: <i>Uchafswm tâl y mis hwn:</i>	<input type="text"/> Per week <i>Y wythnos</i>	<input type="text"/> Per week <i>Y wythnos</i>	<input type="text"/> Per night <i>Y nos</i>	<input type="text"/> Per night <i>Y nos</i>

Date <i>Dyddiad</i>	HOLIDAY HOMES/CHALETS LET CARAFANNAU SEFYDLOG/SIALES A FWCIWYD		TOURING PITCHES LET SAFLEOEDD TEITHIOL A FWCIWYD	
	Caravans <i>Carafannau</i>	Chalets <i>Siales</i>	Caravans/motorhomes <i>Carafannau teithiol/Carafannau modur</i>	Tents <i>Pebyll</i>
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				
27				
28				
29				
30				
31				
Total Days <i>Cyfansymiau</i>				

NOTES:

Please do not include any units or pitches which are temporarily unavailable for letting.

The form is divided into daily units for your convenience. As an alternative, weekly or monthly totals may be entered.

Nodiadau:

Peidiwch a chynnwys unedau neu safleoedd sydd ddim ar gael i'w rhentu dros dro.

Mae'r ffurflen yma wedi ei rhannu mewn i unedau ddyddiol. Ond gallwch llenwi y cyfanswmau wythnosol neu fisol, os yn haws.

HOSTEL ACCOMMODATION OCCUPANCY SURVEY

Month: **JANUARY 2011**

Establishment Code: **WY-**

ESTABLISHMENT INFORMATION (Please update if necessary)

If closed all month, please tick:

Number of Bedspaces:

Max charge this month per person per night (excluding breakfast): £

NOTES ON COMPLETING THE FORM

When giving daily figures, it is not necessary for you to calculate the totals for the month unless you wish to do so.

If daily information is unavailable, please enter monthly totals in the bottom row.

If you cannot provide separate figures for UK and Overseas guests, please leave these columns blank and complete the "Total" columns.

Please exclude children in cots from your figures.

Please indicate clearly any days when you were closed for business by writing "Closed" in the appropriate row.

Date	Number of guests staying overnight			Total capacity <i>(to be completed only if capacity differs from normal)</i>
	UK	Overseas	Total	
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				
27				
28				
29				
30				
31				
Totals				

PLEASE RETURN THE COMPLETED FORM BY **12 FEBRUARY 2011**

TNS Travel & Tourism, 19 Atholl Crescent, Edinburgh EH3 8HQ
 TEL: 0131 656 4000 FAX: 0131 656 4001 occsurvey@tns-global.com

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