

Wales Accommodation Occupancy Survey 2008

Final Report

May 2009



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Visit Wales

May 2009

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A. Executive Summary

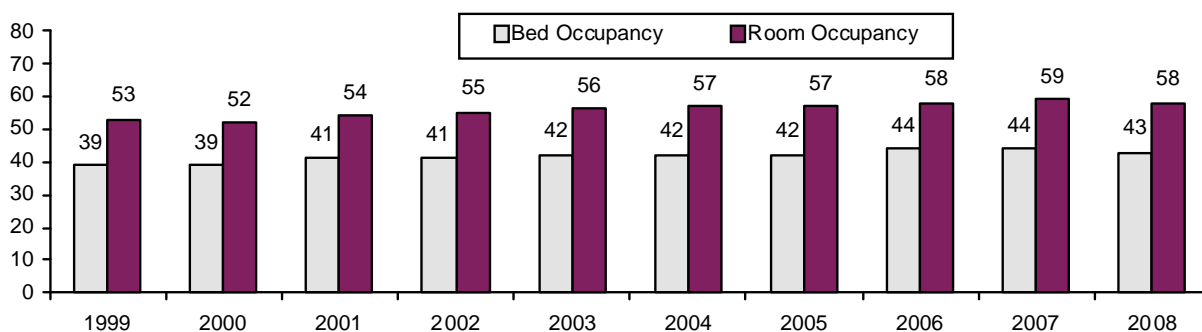
An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to include all serviced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

A new development for 2008 is that TNS Travel & Tourism are also undertaking the self catering accommodation element of the occupancy survey. The self catering survey had been conducted in varying formats since 1987 by another contractor. Since 2003 however, the methodology and software used to analyse the data has been consistent. The survey consists of self catering accommodation, caravan holiday homes, touring caravan and camping parks. Furthermore, in 2008, hostels and bunk houses have also been included within the coverage of the survey.

Hotels

The annual average bed and room occupancy rates in 2008 were 43% and 58% respectively, a decline of 1% on 2007 (44% and 59% respectively). Although marginally lower than the rates recorded in 2007, they remain some of the highest recorded since 1999. In the period since 2004, the annual average bed and room occupancy rates have not altered to any significant extent.

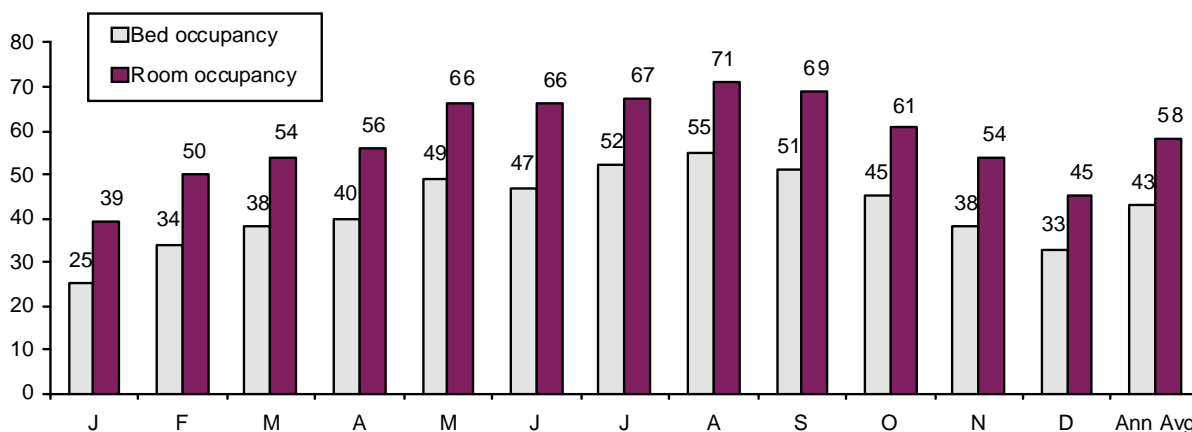
Figure C-1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2008 are presented in Figure C-2 below.

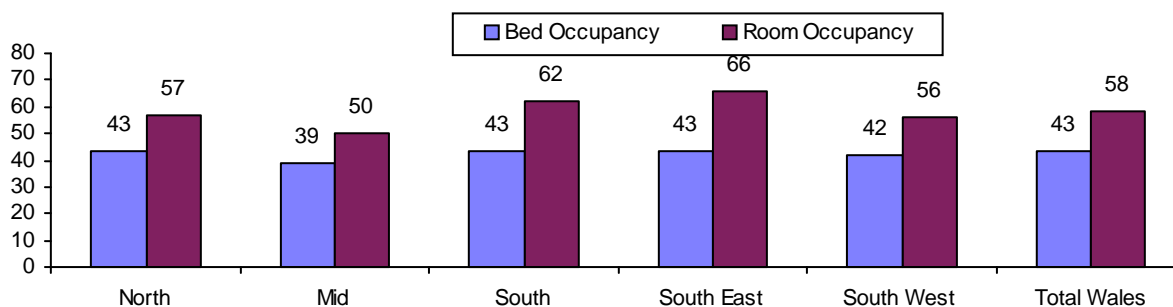
Figure C-2 - Hotels - Monthly Bed & Room Occupancy – 2008 (%)



The occupancy rates recorded in 2008 reflect the seasonality of the hotel sector, with the average bed occupancy rate peaking during August (55%) from 25% in January before falling to 33% in December. This trend is also evident in the average room occupancy figures which rose from 39% in January to 71% in August, before falling to 45% in December.

Regional Occupancy Rates

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

Figure C-3 - Hotels - Annual Average by Regions of Wales – 2008 (%)

In 2008, there was less variation recorded across the regions for the bed occupancy rate with three in five reporting an identical figure - 43%. Mid Wales recorded the lowest bed occupancy rate, 4% down on the average at 39%.

There was more variation across the regions for the annual room occupancy rate. As in previous years, establishments located in the South East recorded the highest room occupancy rates – 66%. South Wales also recorded relatively high average room occupancy levels at 62%. Mid Wales, as with previous years, recorded a slightly lower than average room occupancy level of 53%.

Percentage of Overseas Guests

As may be expected, overseas occupancy was highest during the main tourist season (May to September), with 6-8% recorded for overseas guests during these months. The exception was in August when a lower rate of 4% was observed. The lowest percentage recorded throughout the year was in February – 2%. The annual average proportion of overseas guests was 5%, a slight increase on the comparative rate for 2007 when 4% was reported.

Percentage of Business Guests

The percentage of overseas guests recorded in 2008 was higher than that recorded in 2007 for seven months of the year. As reported in last year's report, compared to the other summer months, a lower rate was recorded in August. It is possible that the generally poor weather in the month of August had an adverse effect on overseas visits.

Occupancy by Size of Hotel

There was a generally positive relationship between the size of hotels and occupancy levels. Hotels with over 100 rooms recorded an average bed occupancy rate that was 17% higher than the rate recorded for hotels with 4-10 rooms, while there was a 27% difference between the average room occupancy rates recorded by hotels in these two size bands.

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.

Occupancy by Tariff

As with previous years, there is no analysis for hotels with a tariff of less than £20 as no establishments with this tariff participated in the survey in 2008. As in 2007, there was little difference in the bed occupancy rate between establishments charging £50-£59.99 and £60 and over, while the difference for room occupancy between these two tariff bands was 5%.

Overall, and as noted in last year's survey, a positive relationship between the tariff charged and occupancy levels for hotels was recorded in 2008. Establishments charging £60 or more recorded an annual average bed occupancy rate that was 27% higher than the rate recorded by those charging £20-£29.99, while there was a 39% difference between the annual average room occupancy rates recorded for hotels in these two tariff bands.

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.

In line with previous findings, the highest annual bed and room occupancy levels in 2008 were recorded by establishments located in cities and large towns (48% and 71% respectively).

Hotels in cities and large towns also recorded the largest differential between bed and room occupancy highlighting the impact of business tourism on these establishments. In contrast, hotels in the countryside and village locations recorded the lowest annual average bed and room occupancy rates (41% and 53% respectively) and also the smallest differential between these two rates.

Occupancy by Grading

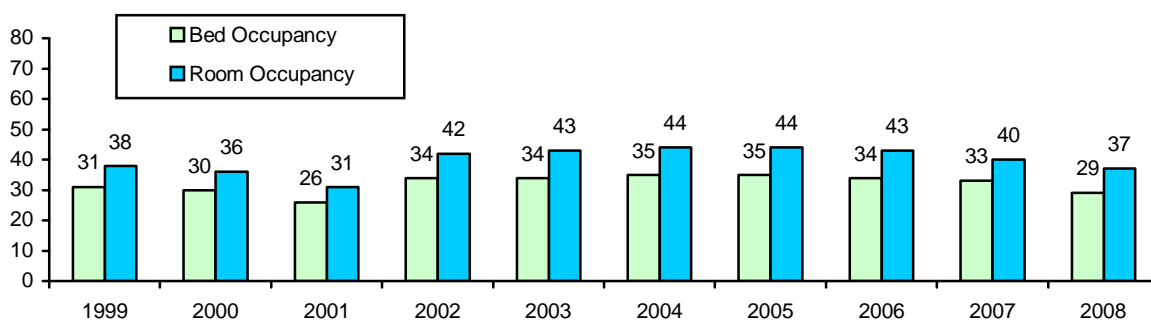
Within the Visit Wales grading scheme, there appeared to be a positive correlation between bed occupancy rates and the grading scheme. Those establishments with a 5 star grading recorded the highest occupancy rates – bed rates between 8-13% higher, as well as room rates 1-5% higher than the other grading categories.

Guest Houses and Bed and Breakfasts

Annual Average Bed and Room Occupancy

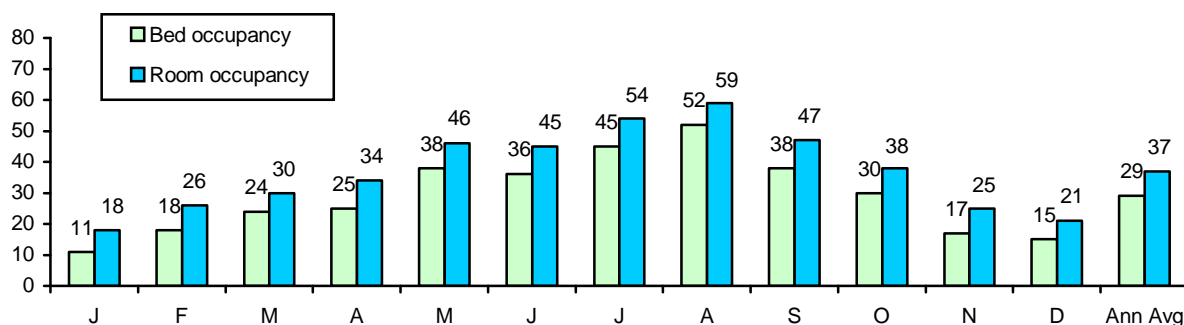
Overall, annual bed occupancy rates in 2008 reported a noticeable decline – down 4% for bed occupancy and 3% for room occupancy. These are the lowest rates recorded since 2001 – the impact of the economic recession and the poor summer weather may well have been factors behind the fall in demand for this sector. Rising fuel and living costs, which became more evident as the year progressed, may well have persuaded many visitors to have taken trips closer to home. The survey findings suggest that the hotel sector (with bed and room rates down 1%) was less affected during the year than the guest house and bed and breakfast sector.

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



Monthly Bed and Room Occupancy

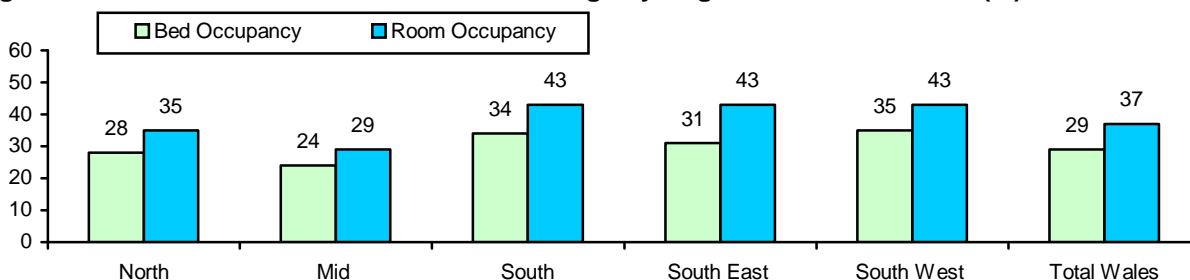
The monthly bed and room occupancy rates along with the annual averages recorded in the guest house and bed and breakfast sector in 2008 are presented in Figure D-2 overleaf.

Figure D-2 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2008 (%)

As in previous years, the seasonality 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 increased in the first half of the year from 11% in January, peaking in August at 52% before falling to 15% in December. The annual average bed occupancy was 29%.

Room occupancy levels followed a similar pattern and had an annual average of 37%.

Occupancy Rates by Regions of Wales

Figure D-3 - Guest Houses/B&Bs - Annual Average by Regions of Wales – 2008 (%)

Annual bed occupancy levels were highest in the South West (35%) with the annual room occupancy rates at their highest level across three of the regions (South, South East and South West, all reporting a 43% occupancy rate). As in previous years, occupancy levels in Mid Wales were noticeably lower, recording 24% for bed occupancy and 29% for room occupancy. The largest difference between the annual bed and room occupancy rates recorded in 2008 was for establishments in the South East of Wales, where the proportion of business occupants in single rooms is likely to be higher than in other regions.

Percentage of Overseas Guests

As in 2006 and 2007, overseas occupancy reached a maximum during the peak summer month of July (21%) and was lowest during February and November when a rate of 5% was recorded. The annual average percentage of overseas guests in guest houses and bed and breakfast establishments in 2008 was 12% (the same as that recorded in 2007).

Percentage of Business Guests

The annual average proportion of business guests in bed and breakfast and guest house establishments in 2008 was 20% - equal to that observed in 2007. The percentage of business guests was at its highest in January (67%) – a rise of 6% compared to January 2007. In contrast and as in previous years, the proportion of business guests was lowest during the month of August (9%).

Occupancy by Size of Guest House/Bed & Breakfast

Similar to the hotel sector and as reported previously, there would appear to be a positive relationship with the size of establishments, with both the annual bed and room occupancy rates higher (7% and 9% respectively) in the larger establishments with 4-10 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.

Occupancy by Tariff

The annual room occupancy rates for establishments charging £20-29.99 have seen a large decline in the last two years – down 9% since 2006. Establishments charging £30-£39.99 have also seen declines in the last few years but less so than the £20-£29.99 sector. The sample size for establishments charging under £20 was too small to illustrate.

Occupancy by Location

Occupancy levels for establishments in cities and large towns were notably higher than those located in small towns or rural areas. However, due to the relatively small sample size, these results should be interpreted with some degree of caution. As in 2007, the second highest rates in 2008 were recorded by establishments located in seaside areas with annual bed and room occupancy rates recorded as 37% and 44% respectively.

Occupancy by Grading

As in the previous two years, graded establishments had higher average bed and room occupancy levels than those with no grading. For example, those with a 4 star grading recorded annual average bed and room occupancy rates 8% and 6% higher than those not part of the Visit Wales grading scheme. The annual average room occupancy rates in 2008 for all graded and non-graded establishments were down on 2007 – graded establishments between 1% and 3%.

All Accommodation

Both the annual average bed and room occupancy rates for all serviced accommodation were lower in 2008 than those recorded in the previous year. At 38%, the annual bed occupancy rate is three percentage points lower than in 2007 (41%) and is the lowest rate recorded since 2003. The average room occupancy rate decreased in 2008 to 52% from 54% in 2007 and is again, the lowest rate recorded since 2003.

For the majority of months, the percentage of overseas bednights was slightly higher in 2008 than the comparative figures for 2007. For example, in September, the 2008 overseas bednights figure was 10% compared to 7% for the same month in 2007.

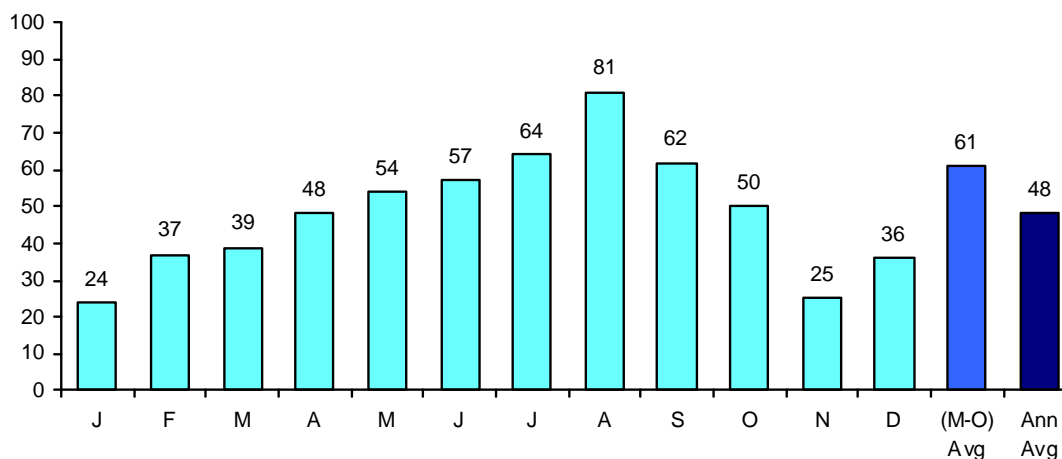
Self catering Accommodation

Cottages and Apartments

Monthly Unit Occupancy

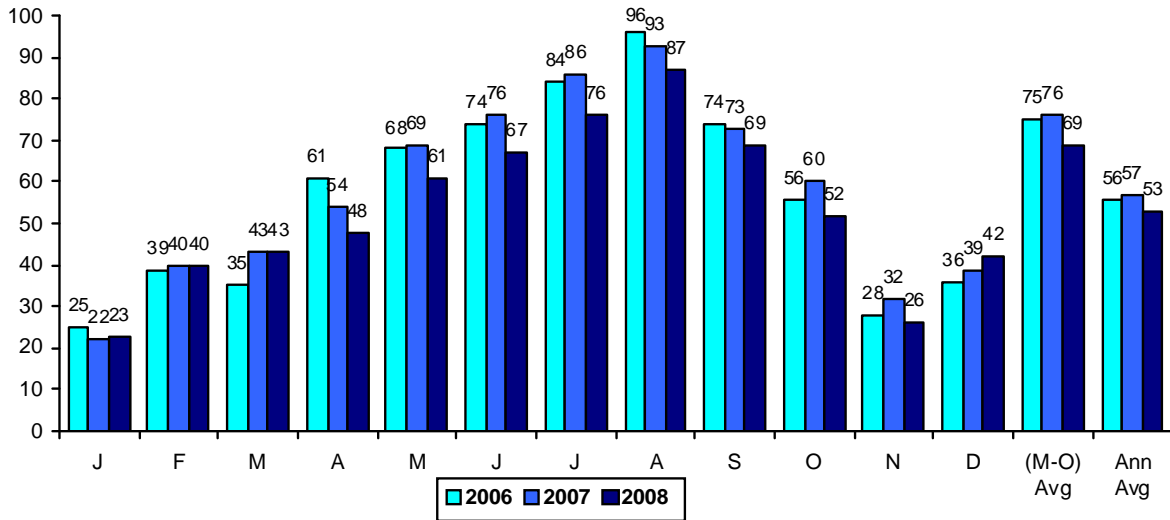
Figure F-1 below presents annual occupancy rates for 2008 across both independent and agency operators.

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



There was considerable variation in occupancy levels throughout the year reflecting the seasonal nature of this accommodation sector. Average unit occupancy increased from 24% in January to a peak of 81% in August before falling to 25% in November. Average unit occupancy levels increased slightly in December to 36%, most likely due to the increased demand during the Christmas and New Year holiday period.

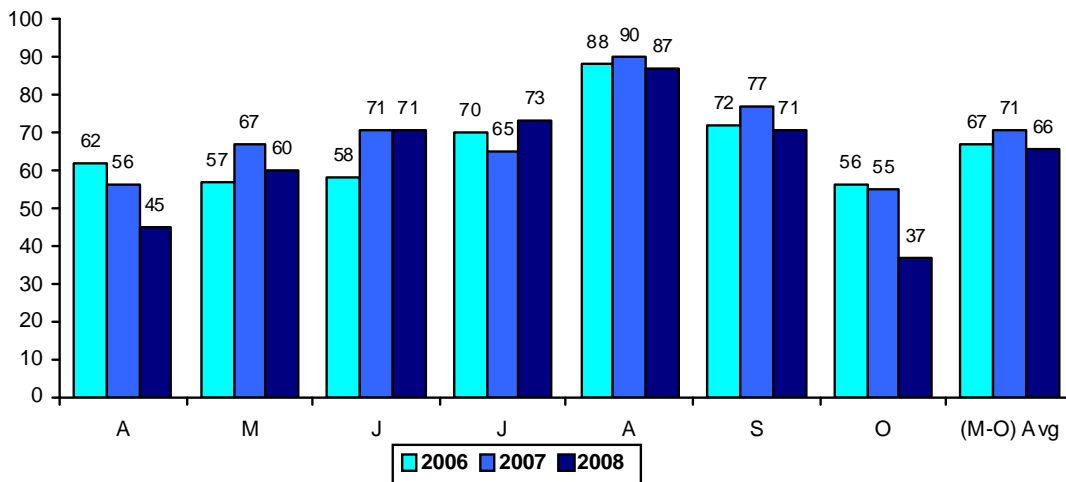
Figure F-2 - Monthly Unit Occupancy – Cottages and Apartments - Independent (%)



The average unit occupancy rate for independent operators in 2008 was 53% - 4% below that recorded in 2007. With the exception of January and December, occupancy figures across all months were equal to or lower than 2007. Reflecting the beginning of the economic slowdown, rising fuel and living costs and generally poor summer weather throughout the UK, a trend appears from May onwards whereby rates are lower (by as much as 10% in July compared to 2007). Similar findings, albeit with less variation, were evident in the serviced accommodation sector.

Caravan Holiday Homes

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



There was considerable variation in occupancy levels throughout the year. Across the six months' peak period, occupancy figures ranged from a high of 87% in August to 37% in October.

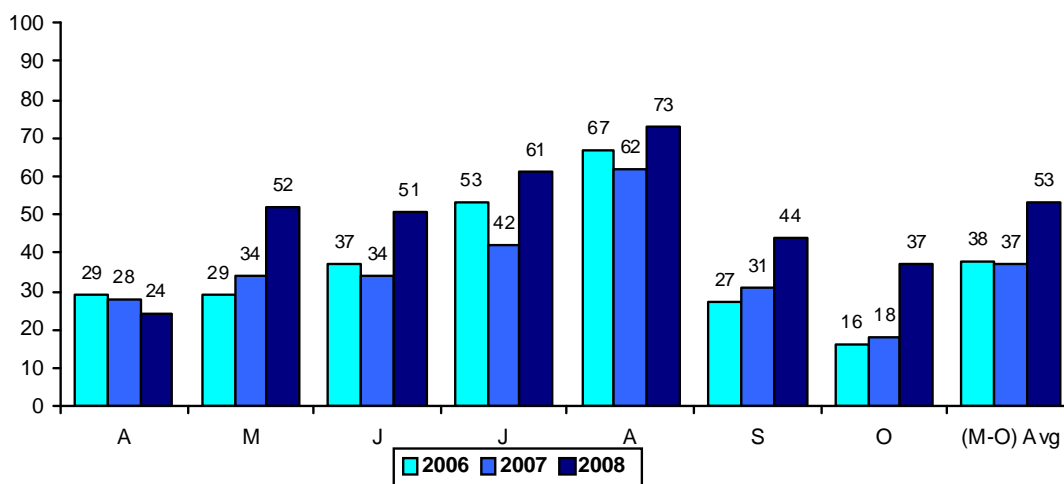
When compared to 2006 and 2007, occupancy is down in 2008 across the majority of these months (July being the one month that recorded an increase over 2007), with a particular decrease in levels reported in October (-18% compared to October 2007).

An observation of the year can be seen across the May to October average where a rate of 66% was recorded - 5% down on 2007.

As with other accommodation sectors, the fall in occupancy rates for caravan holiday homes is likely to be the result of a combination of generally poor weather throughout the year (but particularly in the peak summer months), rising living costs and uncertainty among visitors due to the impending economic recession.

Touring Caravan and Camping Parks

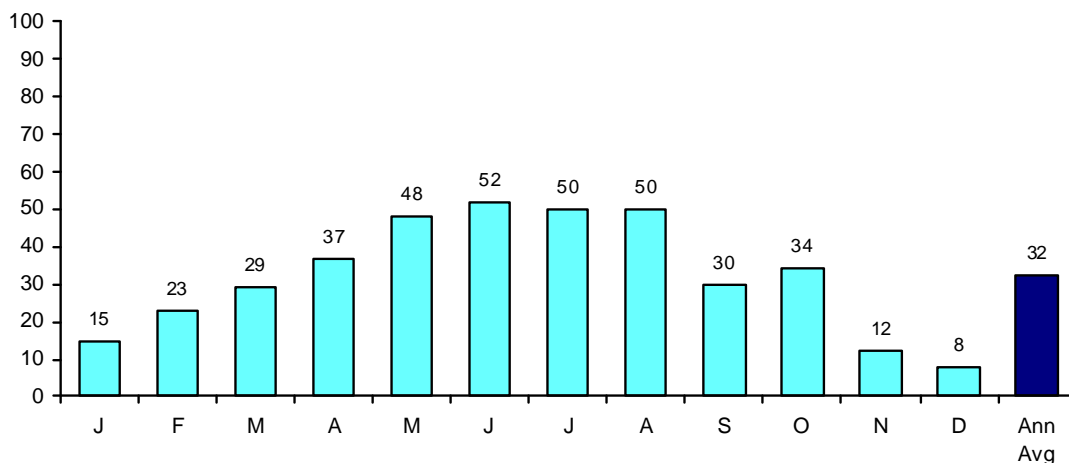
Figure H-1 - Monthly Unit Occupancy – Touring Caravan and Camping Parks (%)



Occupancy levels across the main season – May to October – recorded a strong increase on 2007 – up 16%. The relatively small sample sizes for this sector, along with possible survey variation between years, should be taken into account when comparing data between years. Even so, it is evident that this sector has performed well in 2008 compared to other accommodation sectors.

Hostels and Bunkhouses

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



Bed occupancy increased from 15% in January to a maximum of 52% in June, before falling to 8% in December. Occupancy rates declined significantly between August and September (a fall of 20%) and October and November (22%). Interestingly, demand for hostel accommodation was slightly higher in October than September (30% v 34%), which may have been influenced by the half term break. October also reported strong demand across the hotel and guest house and bed and breakfast sector. Across the whole of 2008, the annual average bed occupancy rate was 32%.

B. Introduction and Methodology

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.

A new development for 2008 is that TNS Travel & Tourism are also undertaking the self catering accommodation element of the occupancy survey. The self catering survey had been conducted in varying formats since 1987 by another contractor. Since 2003 however, the methodology and software used to analyse the data has been consistent. The survey consists of self catering accommodation, caravan holiday homes, touring caravan and camping parks. Furthermore, in 2008, hostels and bunk houses have also been included within the coverage of the survey.

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

- Section C: Hotels
- Section D: Guest houses and Bed and Breakfast establishments
- Section E: All Serviced Accommodation
- Section F: Self catering cottages and apartments
- Section G: Caravan holiday homes
- Section H: Touring caravan and camping parks
- Section I: Hostels and bunkhouses.

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

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 Travel and Tourism 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; and 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 overleaf illustrates how the bed and room occupancy rates are calculated.

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

A definition of the regions used in the analysis is presented in the section on hotels (Section C).

Self-catering cottages and apartments methodology

In 2008, the self catering element of the survey covered a full twelve month period. Self-catering operators are given the option of completing their forms on a daily or monthly basis (on average, 90% complete on a daily 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 – are collected on a daily basis and results relate to the calendar month.

At the start of each month, a panel of operators were sent an occupancy form. They were asked to record, for each property, on a daily basis: whether the property was 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 Travel and Tourism 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 =	$\frac{\text{Total number of units occupied}}{\text{Total number of units available}}$	X 100%
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Caravan holiday homes and chalets methodology

In 2008, the static caravan holiday homes survey covered a full twelve month period. Reflecting the seasonality of this type of accommodation, these operators will only be asked to provide data from March – October inclusive from 2009 onwards.

Occupancy figures for static caravans are collected on a daily basis and results relate to the calendar month. At the start of each month, a panel of operators 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 Travel and Tourism 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.

$$\text{Pitch occupancy rate} = \frac{\text{Total number of pitches occupied}}{\text{Total number of pitches available}} \times 100\%$$

Touring caravan and camping parks methodology

In 2008, the touring caravan and camping parks survey covered a full twelve month period. Reflecting the seasonality of this type of accommodation, these operators will only be asked to provide data from March – October inclusive from 2009 onwards.

Occupancy figures for this survey are collected on a daily basis and results relate to the calendar month. At the start of each month, a panel of operators 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 were let (caravan and tent pitches separately). The form was returned to TNS Travel and Tourism 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.

$$\text{Pitch occupancy rate} = \frac{\text{Total number of pitches occupied}}{\text{Total number of pitches available}} \times 100\%$$

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 receive an occupancy form at the start of each month on which they are 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 are not asked how many rooms are occupied. The completed forms are returned to TNS Travel and Tourism 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.

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

Trended Results – non-serviced accommodation

Comparative figures from 2006 and 2007 have been presented throughout the section where available. A fundamental change to the analysis of self 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 figures analysed are methodologically consistent. For simplicity and where appropriate, we have applied this three year trended guideline to all self catering segments.

However, it should be noted 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.

C. Hotels

Section C 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, see Section B.

Sample Size

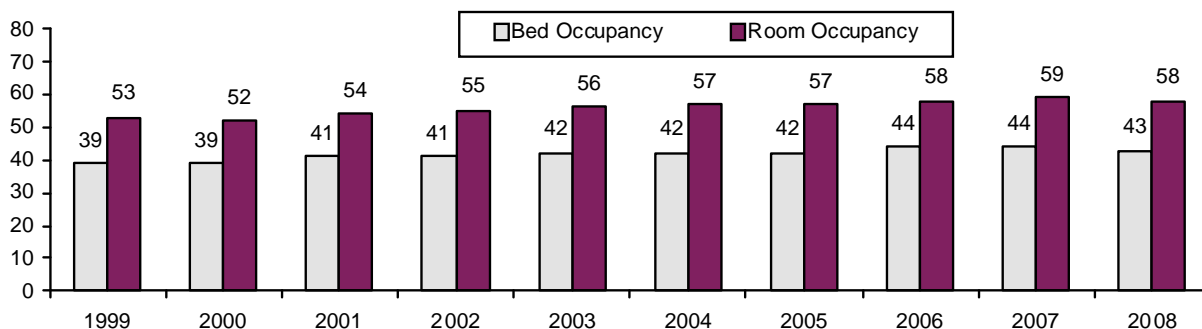
In 2008, a total of 150 hotels participated in the survey (i.e. provided at least one return during the year). To ensure that the results are comparable across the months, a great deal of effort was placed in trying to maintain the level of response each month and operators have been encouraged to provide a full response over the year. Over half (51%) of the operators who contributed to the survey provided data for every month of the year. A further 10% provided data for all but one month of the year.

During this period, 53 hotels were recruited to take part in the survey – a result of increased co-operation from local authorities. However, in the same period 28 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 2008 were 43% and 58% respectively, a decline of 1% on 2007 (44% and 59% respectively). Although marginally lower than the rates recorded in 2007, they remain some of the highest recorded since 1999. In the period since 2004, the annual average bed and room occupancy rates have not altered to any significant extent.

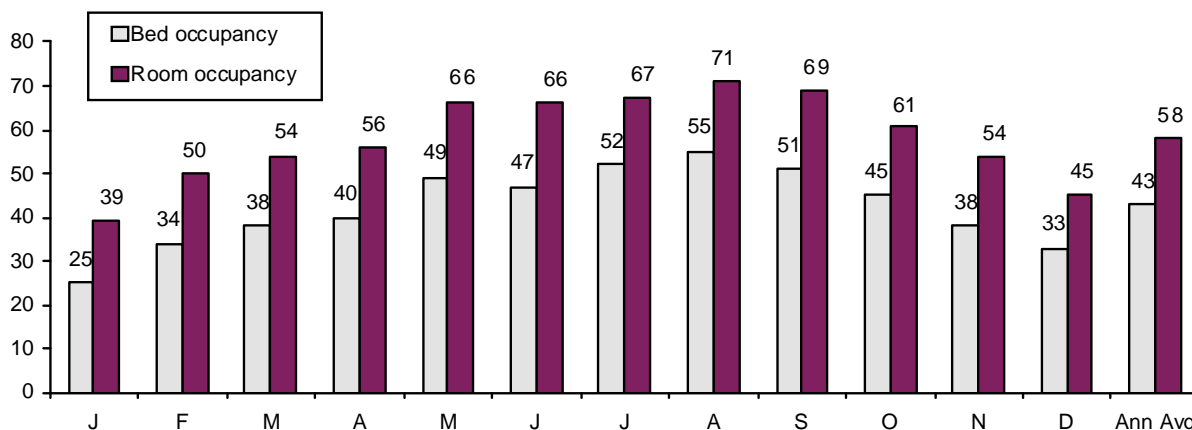
Figure C-1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2008 are presented in Figure C-2 below.

Figure C-2 - Hotels - Monthly Bed & Room Occupancy – 2008 (%)



The occupancy rates recorded in 2008 reflect the seasonality of the hotel sector, with the average bed occupancy rate peaking during August (55%) from 25% in January before falling to 33% in December. This trend is also evident in the average room occupancy figures which rose from 39% in January to 71% in August, before falling to 45% in December.

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

	Room occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
January	31	31	33	36	37	35	40	38	40	39
February	38	42	43	47	48	49	48	50	50	50
March	45	44	44	50	50	52	52	51	53	54
April	51	52	49	52	56	54	57	58	58	56
May	58	58	61	60	62	63	63	65	65	66
June	62	61	63	63	63	65	65	66	67	66
July	67	67	66	65	66	67	67	70	67	67
August	69	68	70	67	69	68	69	73	73	71
September	67	63	64	65	67	69	69	71	71	69
October	55	55	58	58	58	58	58	61	62	61
November	47	47	53	50	50	52	50	53	55	54
December	37	41	43	42	43	45	43	44	47	45
<i>Annual Average</i>	<i>53</i>	<i>52</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>

For eight months in 2008 (January, April, June and August to December), average room occupancy rates were slightly lower than the comparative rates for 2007. This is most likely as a result of the economic slowdown, which became more evident as the year progressed, as well as the preceding year being a very good year for the hotel sector with occupancy rates at their highest in ten years. August and September fell by 2% which may well be a reflection of the rising fuel costs plus the generally poor summer weather.

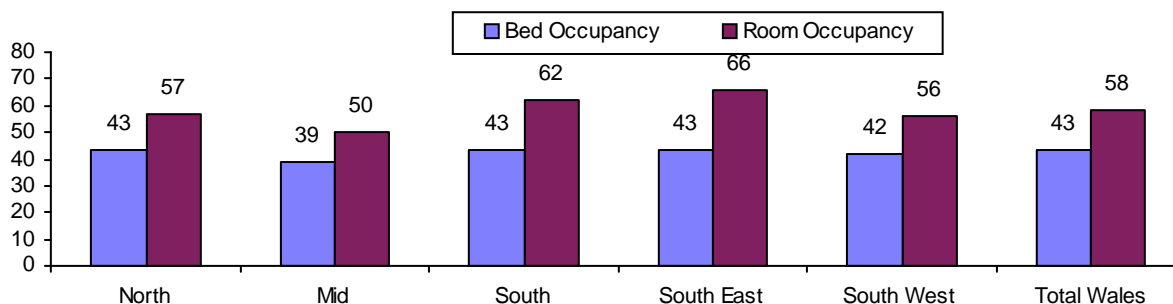
Trends in monthly bed occupancy rates since 1999 are presented in Appendix 1a.

Regional Occupancy Rates

Figure C-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 for the South East and South West regions.

Figure C-3 - Hotels - Annual Average by Regions of Wales – 2008 (%)



In 2008, there was less variation recorded across the regions for the bed occupancy rate with three in five reporting an identical figure - 43%. Mid Wales recorded the lowest bed occupancy rate, 4% down on the average at 39%.

There was more variation across the regions for the annual room occupancy rate. As in previous years, establishments located in the South East recorded the highest room occupancy rates – 66%. South Wales also recorded relatively high average room occupancy levels at 62%. Mid Wales, as with previous years, recorded a slightly lower than average room occupancy level of 53%.

Average bed and room occupancy levels for each region on a monthly basis for 2008 are presented in Appendix 1b and 1c. Bed and room occupancy levels by unitary authority are presented in Appendix 1d and 1e. 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 1998 are presented in Table C-2 below.

In 2008, a similar trend to the last few years has been evident with those establishments located in the South East and South recording the highest room rates and those in Mid Wales the lowest. In terms of trends across the different regions – reflecting this, the South East reported a 3% increase in room occupancy rates in 2008, up to 66%. Mid Wales, on the other hand, recorded a 3% decrease to 50%.

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

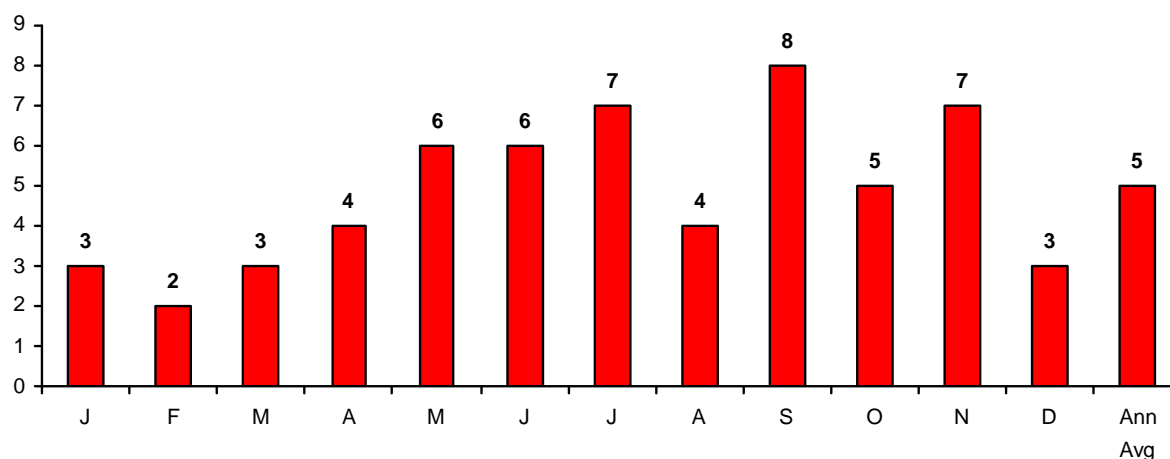
	Annual Average Room Occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Wales	52	53	53	52	53	54	54	57	59	57
Mid Wales	42	43	44	49	51	52	52	53	53	50
South Wales	56	55	58	58	59	60	60	61	61	62
South East Wales	59	57	61	60	62	63	60	63	63	66
South West Wales	44	48	53	56	54	55	59	58	58	56
TOTAL WALES	53	52	54	55	56	57	57	58	59	58

Percentage of 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 overseas guests information 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 we presented the percentage of overseas guests based on the total number of arrivals. This information is now not collected, so consequently, we have presented the proportion of overseas stays as a percentage of overseas 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 is 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, we have reduced the amount of trended information presented for overseas guests and focus in this report on trended 2007 data versus the latest 2008 results.

Figure C-4 - Hotels - Percentage of Overseas Bednights 2008 (%)

As may be expected, overseas occupancy was highest during the main tourist season (May to September), with 6-8% recorded for overseas guests during these months. The exception was

in August when a lower rate of 4% was observed. The lowest percentage recorded throughout the year was in February – 2%.

The annual average proportion of overseas guests was 5%, a slight increase on the comparative rate for 2007 when 4% was reported.

Trends in Percentage of Overseas Guests

As illustrated in Figure C-5 below, the percentage of overseas guests recorded in 2008 was slightly higher than in 2007 – a rise of 2% to 6%.

The percentage of overseas guests recorded in 2008 was higher than that recorded in 2007 for seven months of the year. As reported in last year’s report, compared to the other summer months, a lower rate was recorded in August. It is possible that the generally poor weather in the month of August had an adverse effect on overseas visits.

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

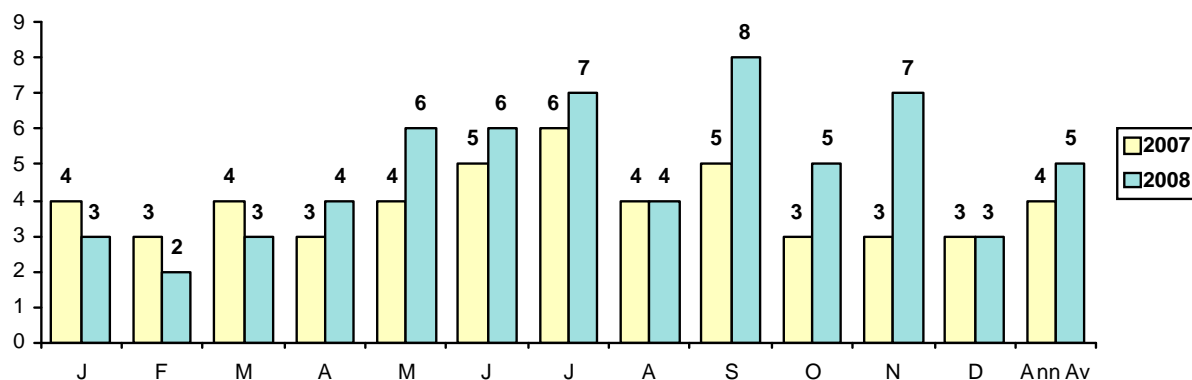
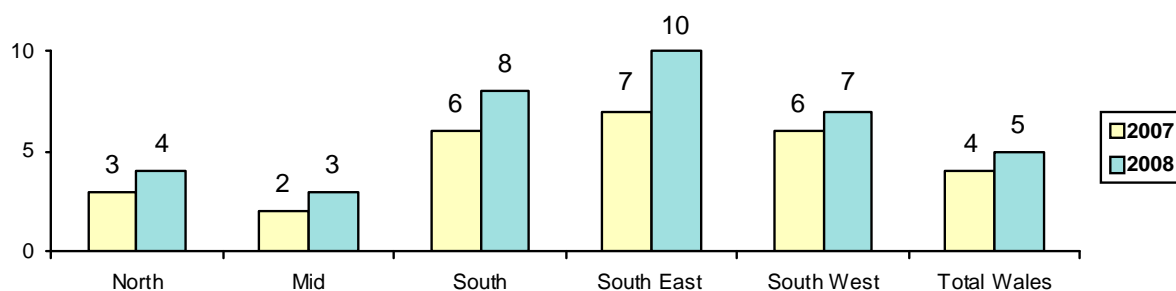


Figure C-6 - Hotels - Percentage of Overseas Guests by Region 2007 – 2008 (%)

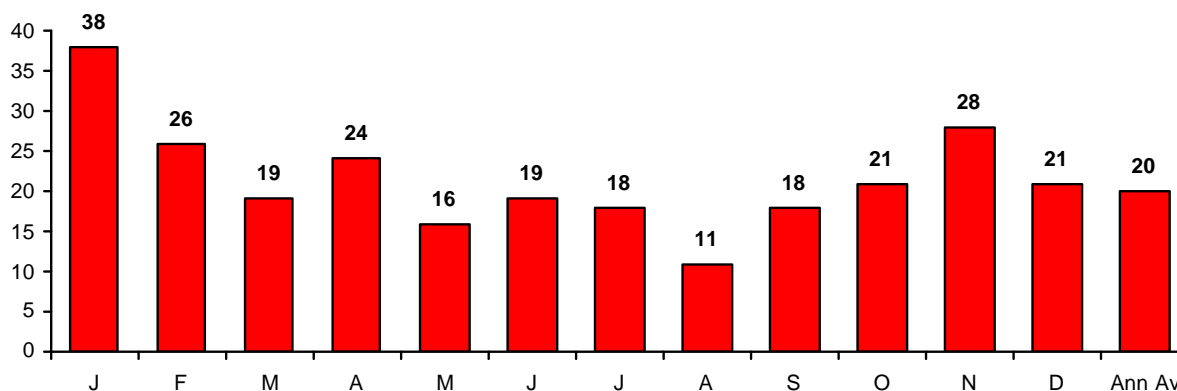


As in previous years, the percentage of overseas guests was highest in the South East (10%). All regions reported an increase in the proportion of overseas guests.

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 this information was only collected from February 2001 onwards and not all participants provide this information.

Figure C-7 – Hotels - Percentage of Business Guests 2008 (%)



In contrast to the trend for overall occupancy levels, the percentage of business guests was highest at the start and end of the year. The highest proportion of business guests was recorded in January (38%). The rate recorded fell to 11% in August, before rising again to 28% in November. Unlike 2007, December reported lower occupancy rates for business guests than November (21%). This pattern of a higher proportion of business guests in the winter months is a well-established trend in UK destinations.

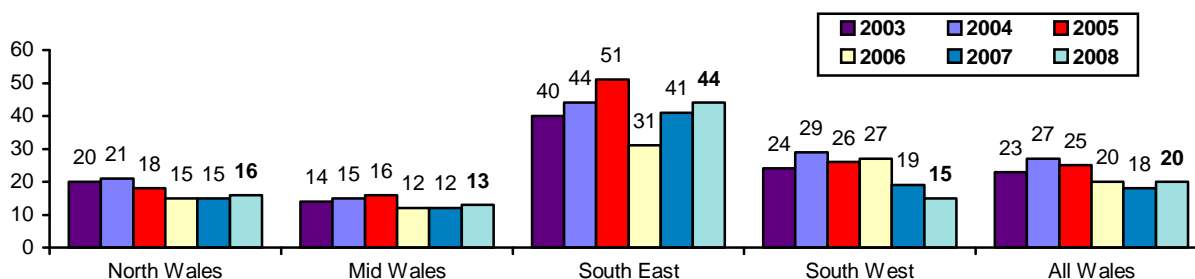
As shown in Table C-3, overleaf, the annual average proportion of business guests was 20%, a slight increase of 2% on the rate recorded in 2007 (18%) and the same as that reported in 2006 (20%). There were some noticeable variations in the percentage of business guests between 2007 and 2008, most notably during the months of January, April, July, September, October and November where the 2008 rate was between 4% and 9% higher than in 2007. The proportion of business guests was lower in 2008 than in the previous year for three months, March (-2%), May (-2%) and December (-3%). Although higher than in 2007, the annual average in 2008 is lower than that recorded between 2003 and 2005 and equal to the 2006 occupancy rate.

Table C-3 Trends in Percentage of Business Guests

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

As reported in previous years, the proportion of business guests is significantly higher in the South East of Wales compared to other regions, with a difference of between 24% and 31% compared to the other regions. This is understandable as the South East region includes the capital city of Cardiff. Following an increase of 10% between 2006 and 2007, the percentage of business guests in the South East continued to rise but at a smaller rate between 2007 and 2008 – up 3%. All the other regions except for the South West reported a rise in occupancy rates of between 1-2%. The South West, on the other hand, observed a 4% decrease.

Figure C-8 – Hotels – Annual Average Percentage of Business Guests by Region 2003 – 2008 (%)



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 2008 are presented in Figure C-9 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 C-9 - Annual Occupancy by Size of Hotel - 2008 (%)

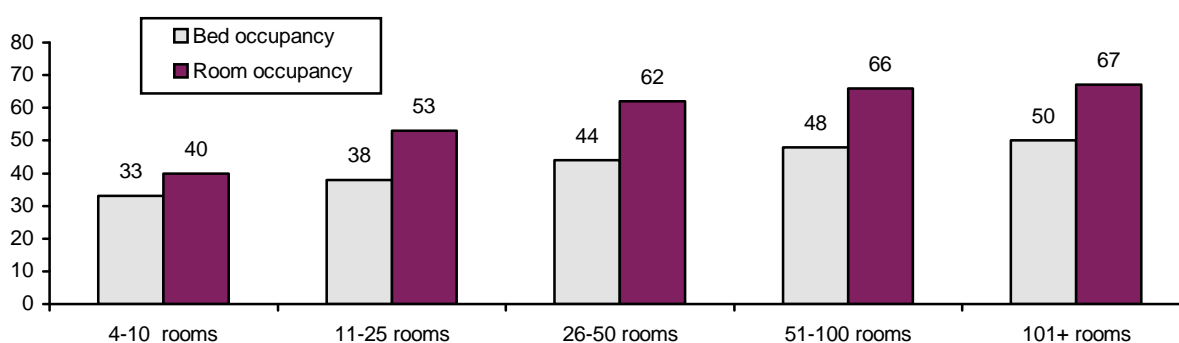


Figure C-9 above illustrates a generally positive relationship between the size of hotels and occupancy levels. Hotels with over 100 rooms recorded an average bed occupancy rate that was 17% higher than the rate recorded for hotels with 4-10 rooms, while there was a 27% difference between the average room occupancy rates recorded by hotels in these two size bands.

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

	Annual Average Room Occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
4-10 rooms	42	40	43	43	44	48	47	47	46	40
11-25 rooms	49	46	49	51	50	50	52	53	54	53
26-50 rooms	54	56	55	53	54	56	56	58	61	62
51-100 rooms	54	59	60	60	63	66	60	62	64	66
101+ rooms	66	65	67	68	68	68	69	71	68	67

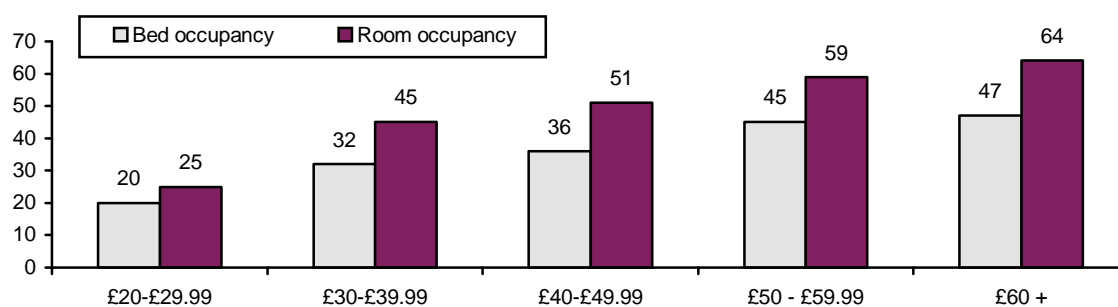
Hotels in the 26-50 rooms and 51-100 rooms size bands all recorded a slight increase in their annual average room occupancy rate compared to 2007, with those in the 26-50 rooms size bands recording their highest annual average room occupancy rate since 1999. Establishments in the smallest and largest size bands both recorded a decrease in their annual average room occupancy rates in 2008 compared to the previous year. This trend was also apparent between 2006 and 2007.

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 C-10 below presents annual bed and room occupancy figures by tariff for 2008. As with previous years, there is no analysis for hotels with a tariff of less than £20 as no establishments with this tariff participated in the survey in 2008.

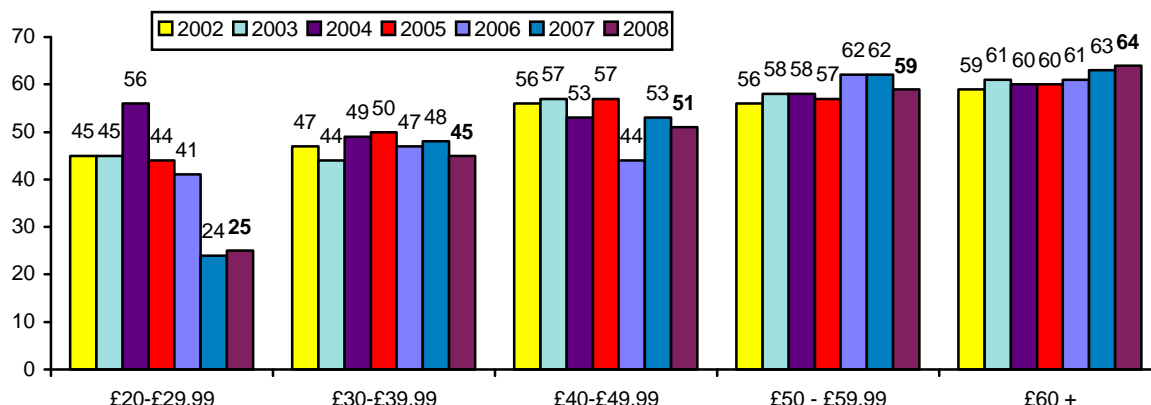
Figure C-10 - Annual Occupancy by Tariff of Hotel – 2008 (%)



Overall, and as noted in last year's survey, a positive relationship between the tariff charged and occupancy levels for hotels was recorded in 2008. Establishments charging £60 or more recorded an annual average bed occupancy rate that was 27% higher than the rate recorded by those charging £20-£29.99, while there was a 39% difference between the annual average room occupancy rates recorded for hotels in these two tariff bands. As in 2007, there was little difference in the bed occupancy rate between establishments charging £50-£59.99 and £60 and over, while the difference for room occupancy between these two tariff bands was 5%.

Figure C-11 below shows the annual average room occupancy rates by tariff for 2002 - 2008.

Figure C-11 - Trends in Annual Room Occupancy Rates by Tariff of Hotel (%)



Hotels charging £60 or more reported an increase in room occupancy rates for the third year in succession – rising from 60% in 2005 to 64% in 2008.

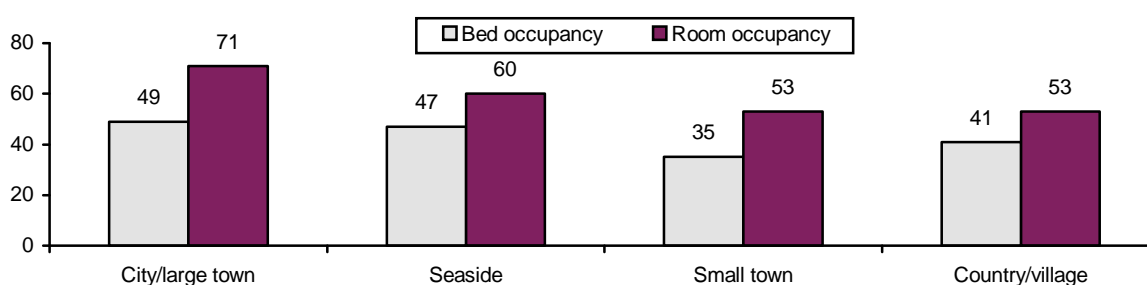
Between 2006 and 2007, the annual average room occupancy rate for hotels charging £20-£29.99 fell significantly from 41% to 24% before reporting a small increase in 2008 – up 1%. It should be noted that the overall sample size for this category has also fallen quite significantly and that for some months, the number of returns for this tariff band was less than five. This is likely to be due to price increases moving hotels from one tariff band to another. Therefore, the results should be treated with caution.

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 C-12 below.

Figure C-12- Annual Occupancy by Location of Hotel - 2008 (%)



In line with previous findings, the highest annual bed and room occupancy levels in 2008 were recorded by establishments located in cities and large towns (48% and 71% respectively). Hotels in cities and large towns also recorded the largest differential between bed and room occupancy highlighting the impact of business tourism on these establishments. In contrast, hotels in the countryside and village locations recorded the lowest annual average bed and room occupancy rates (41% and 53% respectively) and also the smallest differential between these two rates.

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

	Annual Room Occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
City/large town	64	60	66	69	72	69	67	71	71	71
Small town	50	51	54	52	53	54	56	57	57	53
Seaside	53	56	56	56	57	56	56	57	62	60
Countryside/village	46	46	48	49	52	53	53	53	52	53

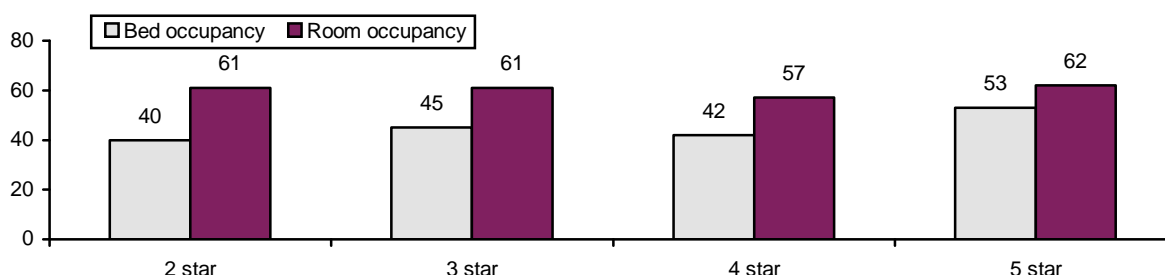
Between 2007 and 2008 there was little variation in room occupancy rates by location of hotel. The most noticeable difference was recorded for small towns – a 4% decline between years.

Occupancy by Grading

Since 1999, occupancy rates for hotels are also 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. Due to the small sample sizes

involved, there is no analysis for establishments graded 1 star or for hotels not graded within the Visit Wales scheme.

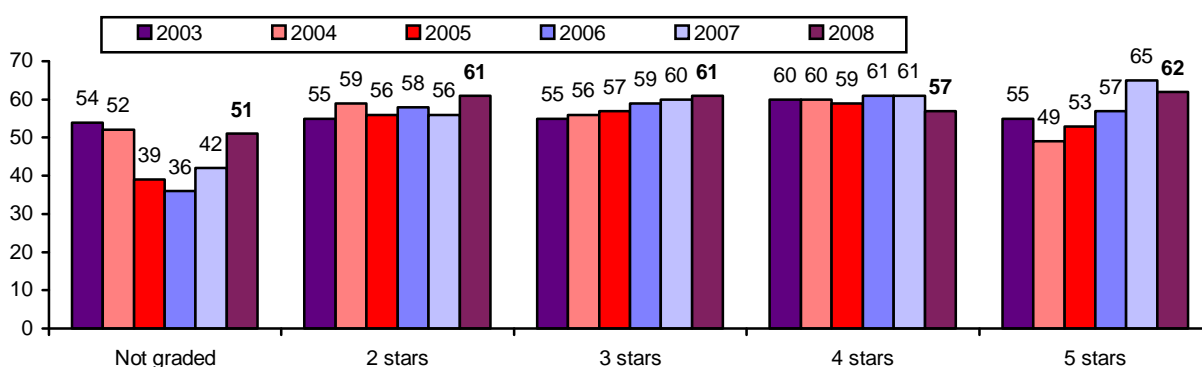
Figure C-13 - Annual Occupancy by Grading of Hotel – 2008 (%)



Within the Visit Wales grading scheme, there appeared to be a positive correlation between bed occupancy rates and the grading scheme. Those establishments with a 5 star grading recorded the highest occupancy rates – bed rates between 8-13% higher, as well as room rates 1-5% higher than the other grading categories.

As illustrated in Figure C-14 below, annual average room occupancy rates for hotels with a 2 or 3 star grading have remained reasonably consistent since 2000. Between 2007 and 2008 however, hotels with a 2 and 3 star grading reported increases in room occupancy rates and those with a 4 or 5 star grading a decline – this may be a reflection of the current economic recession forcing consumers to downgrade to less expensive establishments. Monthly and annual average room occupancy figures for grading are presented in Appendix 1b and 1c.

Figure C-14- Trends in Annual Room Occupancy Rates by Grading of Hotel (%)



D. Guest Houses and Bed and Breakfasts

Section D 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, see Section B.

Sample Size

In 2008, 160 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.

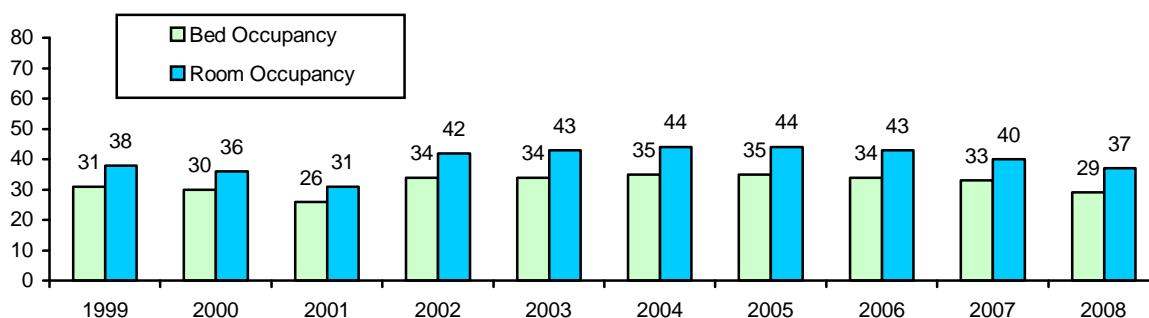
51% of the operators (82) who contributed to the survey provided data for every month of the year. A further 9% (14) provided data for all but one month.

During 2008, 79 guest house and bed and breakfast establishments were recruited to take part in the survey. As with hotels, this was largely as a result of increased co-operation from local authorities. However, in the same period 27 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

Overall, annual bed occupancy rates in 2008 reported a noticeable decline – down 4% for bed occupancy and 3% for room occupancy. These are the lowest rates recorded since 2001 – the impact of the economic recession and the poor summer weather may well have been factors behind the fall in demand for this sector. Rising fuel and living costs, which became more evident as the year progressed, may well have persuaded many visitors to have taken trips closer to home. The survey findings suggest that the hotel sector (with bed and room rates down 1%) was less effected during the year than the guest house and bed and breakfast sector.

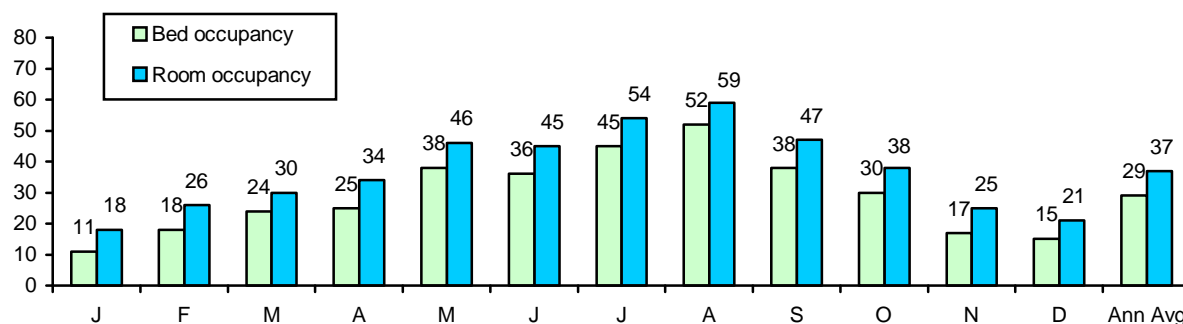
Figure D-1 - Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



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 2008 are presented in Figure D-2 below.

Figure D-2 - Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2008 (%)



As in previous years, the seasonality 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 increased in the first half of the year from 11% in January, peaking in August at 52% before falling to 15% in December. The annual average bed occupancy was 29%.

Room occupancy levels followed a similar pattern and had an annual average of 37%.

As shown in Table D-1 overleaf, the annual average room occupancy figures for 2008 were lower than 2007 (37% v 40%). With the exception of March and December, room occupancy rates on a monthly level were either equal or lower than those recorded in 2007. March will have been boosted by the Easter holiday period falling in March in 2008 and April in 2007. August was particularly poor with room rates down 7%. As mentioned earlier, a likely cause being the poor weather as well as the impending credit crunch which began to have a noticeable impact from Q3 onwards.

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

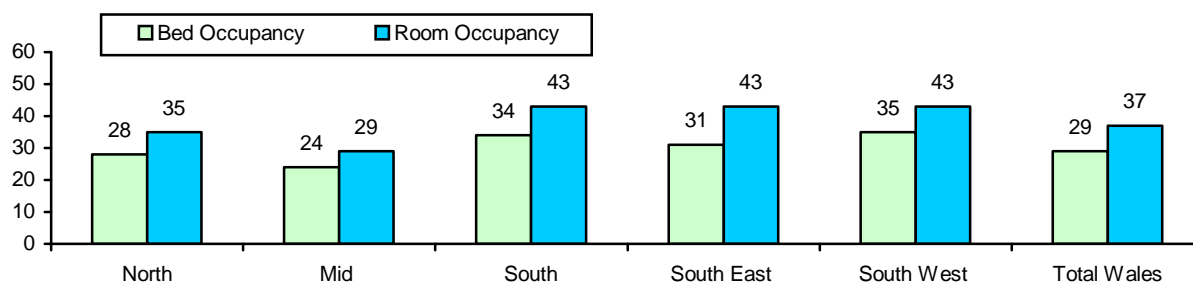
Table D-1 - Guest Houses/B&Bs - Trends in Room Occupancy Rates - Monthly Averages (%)

	Room occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
January	16	15	14	22	21	22	26	17	19	18
February	19	24	20	26	27	27	29	27	27	26
March	25	24	14	34	30	29	36	28	29	30
April	34	37	24	33	45	44	40	42	40	34
May	43	40	34	45	52	49	49	52	49	46
June	47	47	38	57	50	57	56	57	50	45
July	57	56	51	60	61	64	63	65	54	54
August	68	67	60	70	72	73	72	71	66	59
September	47	44	42	54	54	56	59	56	51	47
October	36	31	32	41	39	43	41	43	39	38
November	24	18	22	29	30	28	24	28	27	25
December	19	18	17	24	24	25	20	27	19	21
Annual Average	38	36	31	42	43	44	44	43	40	37

Regional Occupancy Rates

Figure D-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 2008. The monthly bed and room occupancy rates for each area are presented in Appendix 2b and 2c of this report.

Bed and room occupancy levels by unitary authority are presented in Appendix 2d and 2e. Due to the small sample size in some areas this information is not always available.

Figure D-3 - Guest Houses/B&Bs - Annual Average by Regions of Wales – 2008 (%)

Annual bed occupancy levels were highest in the South West (35%) with the annual room occupancy rates at their highest level across three of the regions (South, South East and South West, all reporting a 43% occupancy rate). As in previous years, occupancy levels in Mid Wales were noticeably lower, recording 24% for bed occupancy and 29% for room occupancy.

The largest difference between the annual bed and room occupancy rates recorded in 2008 was for establishments in the South East of Wales, where the proportion of business occupants in single rooms is likely to be higher than in other regions.

Trends in Regional Occupancy Rates

Room occupancy levels in each region since 1999 are presented in Table D-2 below.

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

	Room occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Wales	36	31	29	38	40	42	44	43	41	35
Mid Wales	32	32	24	33	33	33	34	33	33	29
South Wales	43	41	37	50	49	50	49	48	44	43
South East Wales	43	43	37	52	52	52	51	49	46	43
South West Wales	39	36	36	48	46	48	47	48	43	43
<i>Total Wales</i>	38	36	31	42	43	44	44	43	40	37

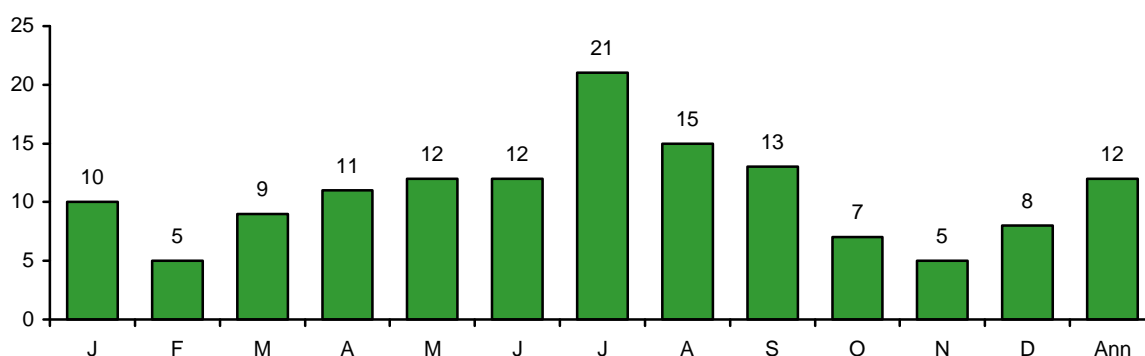
With the exception of South West Wales, room occupancy levels across the different regions in 2008 were lower than 2007. The biggest decrease was recorded in the North – a fall of 6%.

Percentage of Overseas Guests

As described in the hotel section for overseas guests (Section C) – 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 overseas guests information 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 we presented the percentage of overseas guests based on the total number of arrivals. This information is now not collected, so consequently, we have presented the proportion of overseas stays 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, we have reduced the amount of trended information presented for overseas guests and focus in this report on trended 2007 data versus the latest 2008 results.

Figure D-4 – Guest Houses/B&Bs - Percentage of Overseas Bednights - 2008 (%)

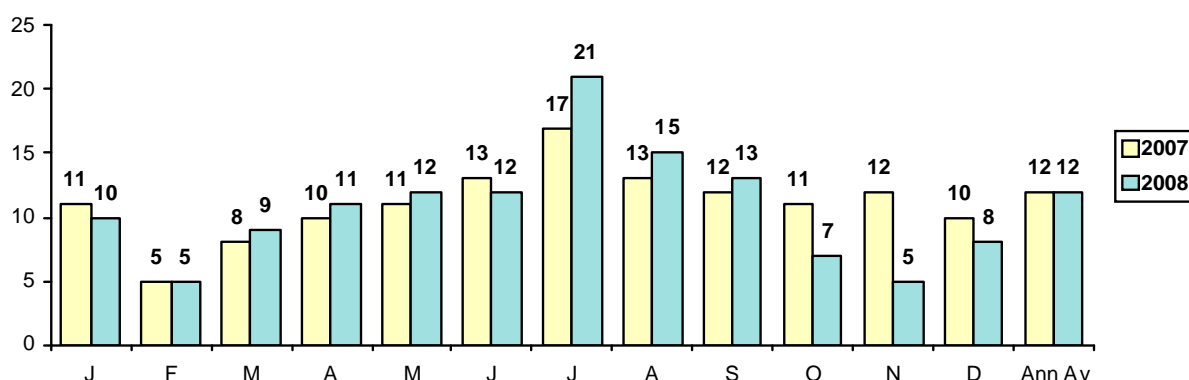


As in 2006 and 2007, overseas occupancy reached a maximum during the peak summer month of July (21%) and was lowest during February and November when a rate of 5% was recorded. The annual average percentage of overseas guests in guest houses and bed and breakfast establishments in 2008 was 12% (the same as that recorded in 2007).

Trends in Percentage of Overseas Guests

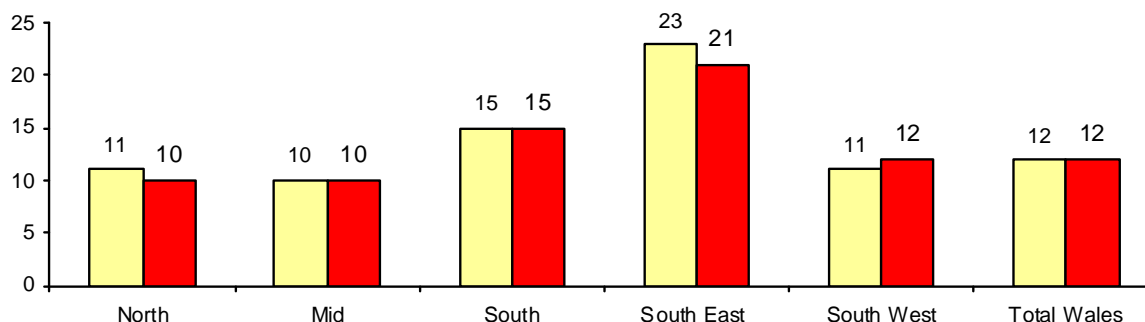
On a monthly basis, the proportion of overseas guests in 2008 was similar to 2007. The year started well with January reporting a 3% increase compared to the same month in 2007. March also performed well (+1%) – helped by Easter falling in March in 2008, with a strong July and August also observed (up 4% and 2% respectively). October and November were less positive with decreases of 4% in October and 7% in November recorded.

Figure D-5 - Guest Houses/B&Bs - Trends in Percentage of Overseas Guests



As illustrated in Figure D-6 below, the percentage of overseas guests across the different geographical areas in Wales ranged from 10-20% (very similar to 2007), with the South East recording the highest proportion of overseas occupants (up 1% on 2007).

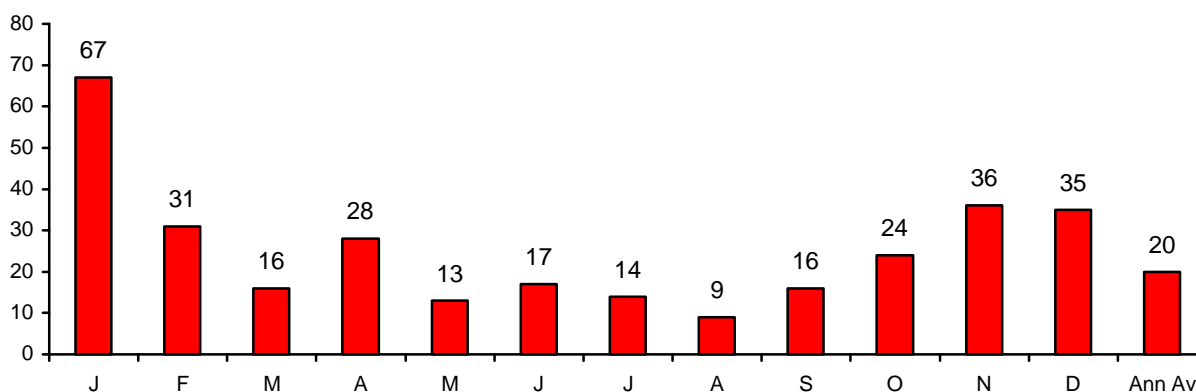
Figure D-6 – Guest Houses/B&Bs - Percentage of Overseas Guests by Region 2007 – 2008 (%)



Percentage of Business Guests

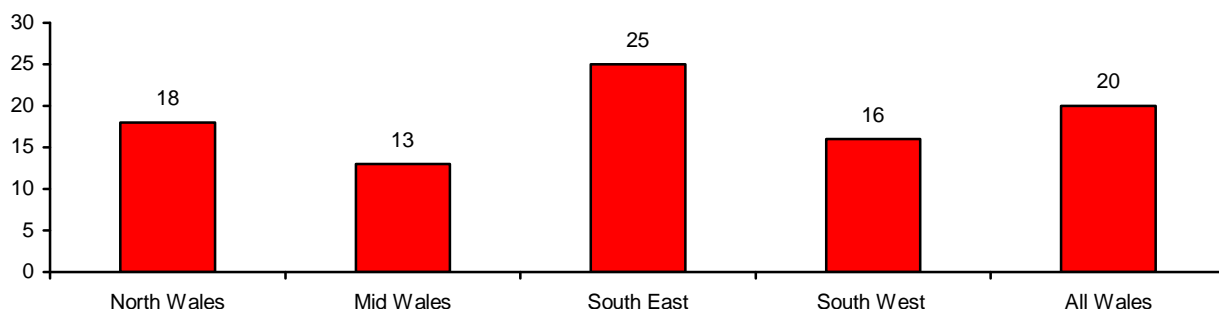
As with hotels, since February 2001, guest house and bed and breakfast operators have been asked to record the number of guests staying for business purposes.

Figure D-7 - Guest Houses/B&Bs - Percentage of Business Guests – 2008 (%)



The annual average proportion of business guests in bed and breakfast and guest house establishments in 2007 was 20% - equal to that observed in 2007. The percentage of business guests was at its highest in January (67%) – a rise of 6% compared to January 2007. In contrast and as in previous years, the proportion of business guests was lowest during the month of August (9%).

Figure D-8 - Guest Houses/B&Bs – Annual Average Percentage of Business Guests by Region – 2008 (%)



As in previous years, the percentage of business guests in the South East was significantly higher in 2008 than in the other areas in Wales. This pattern is similar to that shown for hotels, where the South East also recorded higher business occupancy levels.

Detailed Analysis of Main Results

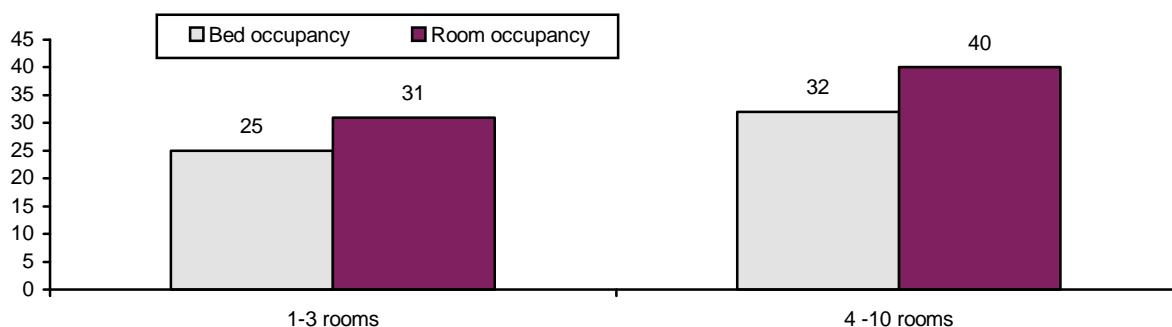
This section of the report looks in more detail at different types of guest house and bed and breakfast establishments which contributed to the survey and the impact, if any; these factors have on levels of bed and room occupancy.

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 D-9 - Annual Occupancy by Size of Guest House/Bed & Breakfast - 2008 (%)



Similar to the hotel sector and as reported previously, there would appear to be a positive relationship with the size of establishments, with both the annual bed and room occupancy rates higher (7% and 9% respectively) in the larger establishments with 4-10 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 D-2 - Trends in Annual Room Occupancy Rates by Size of Guest House/Bed & Breakfast (%)

	Annual Average Room Occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
1-3 rooms	35	32	26	33	34	36	36	34	33	31
4-10 rooms	41	40	36	45	45	48	48	47	47	40

Bed and room occupancy rates for establishments with 1-3 rooms and 4-10 rooms in 2008 were lower than those reported in 2007 – significantly so in the case of establishments with 4-10 rooms (a fall of 7%).

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 between £20 and £40.

Figure D-10 below presents annual bed and room occupancy figures by tariff for 2008.

Figure D-10 - Annual Occupancy by Tariff of Guest House/B&B – 2008 (%)

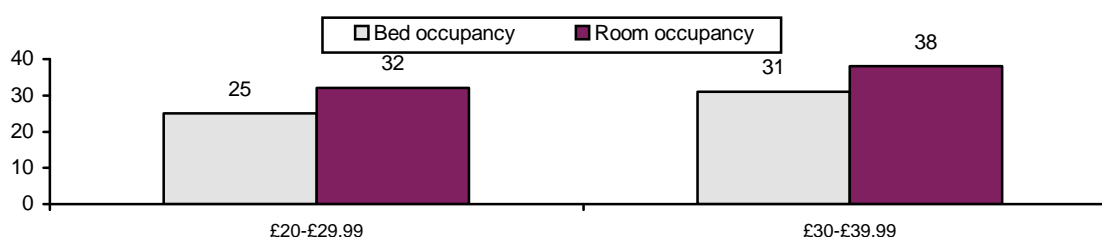
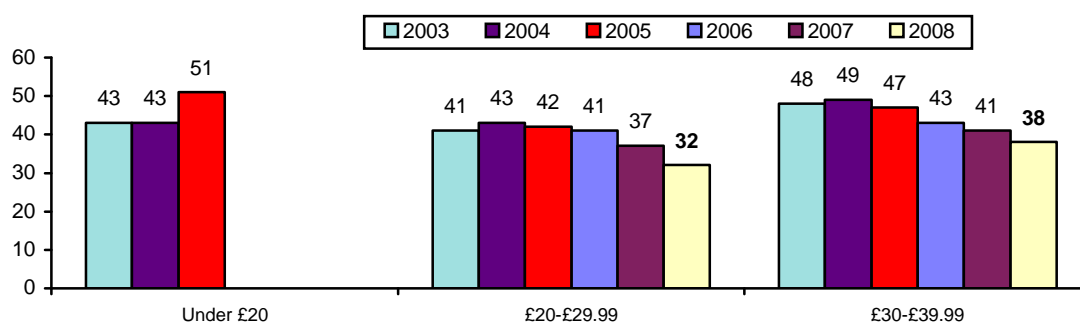


Figure D-12 overleaf presents the annual average bed occupancy rates by tariff between 2003 and 2008. It should be highlighted that as a result of changes in the tariff bands used in analysis, comparative figures prior to this are not available.

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

The annual room occupancy rates for establishments charging £20-29.99 have seen a large decline in the last two years – down 9% since 2006. Establishments charging £30-£39.99 have also seen declines in the last few years but less so than the £20-£29.99 sector. The sample size for establishments charging under £20 was too small to illustrate.

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 country/village locations. The monthly bed and room occupancy levels for each type of location are presented in Appendix 2b and 2c.

As presented below and reported previously, occupancy levels for establishments in cities and large towns were notably higher than those located in small towns or rural areas. However, due to the relatively small sample size, these results should be interpreted with some degree of caution. As in 2007, the second highest rates in 2008 were recorded by establishments located in seaside areas with annual bed and room occupancy rates recorded as 37% and 44% respectively.

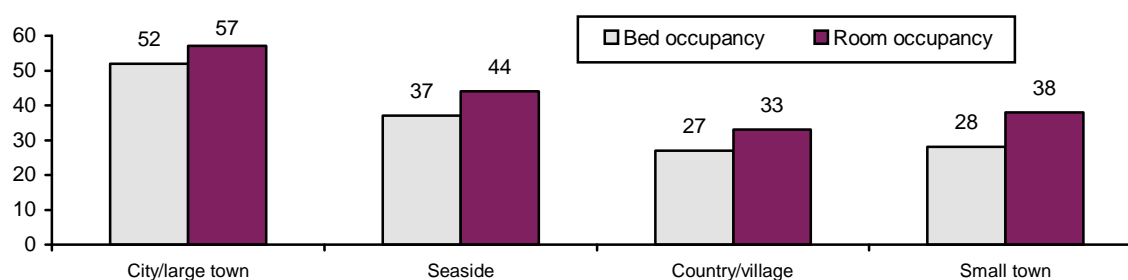
Figure D-12 - Annual Occupancy by Location of Guest House/B&B – 2008 (%)

Table D-3 - Trends in Annual Room Occupancy Rates by Location of Guest House/B&B (%)

	Annual Average Room Occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
City/large town	*	*	55	67	70	63	64	67	64	57
Small town	40	37	28	43	39	38	42	41	40	38
Seaside	43	39	39	37	44	46	47	47	46	44
Country/village	34	33	27	41	40	41	41	40	36	33

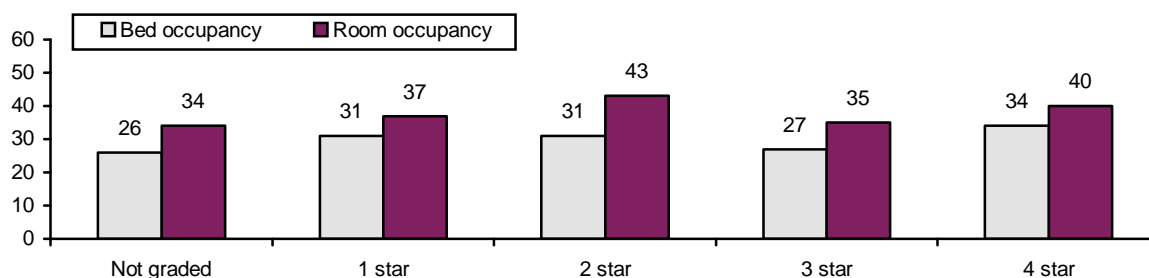
* Data not available due to change in bands for analysis

Establishments in cities and large towns and in the countryside and villages recorded a 3-4 percentage points decrease compared to 2006.

Occupancy by Grading

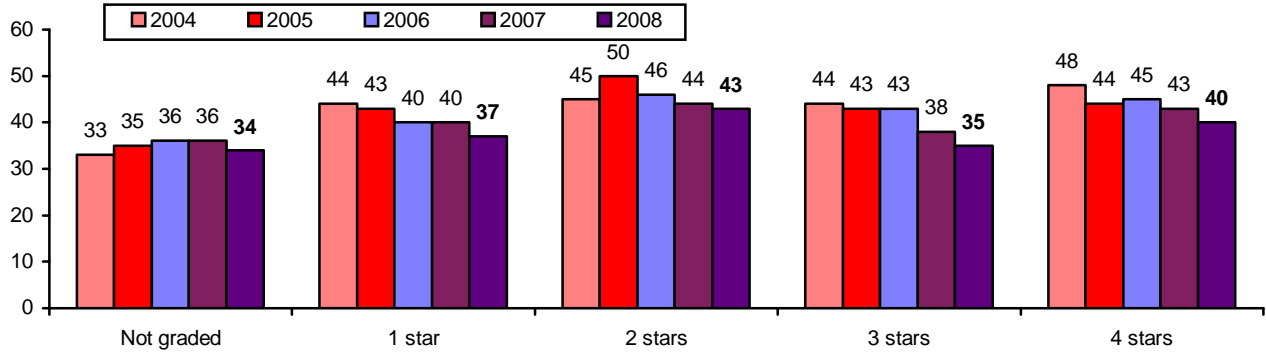
As with hotels, occupancy rates for guest house and bed and breakfast establishments were analysed according to their grading under the Star Grading Scheme administered by Visit Wales (formerly Wales Tourist Board), introduced in 1999. On this basis, there are no comparable figures available prior to this year.

Due to the small sample size of establishments with 5 stars there is no analysis for this grading.

Figure D-13 - Occupancy by Grading of Guest House/B&B- 2008 (%)

As in the previous two years, graded establishments had higher average bed and room occupancy levels than those with no grading. For example, those with a 4 star grading recorded annual average bed and room occupancy rates 8% and 6% higher than those not part of the Visit Wales grading scheme. As shown in figure D-14 overleaf, the annual average room occupancy rates in 2008 for all graded and non-graded establishments were down on 2007 – graded establishments between 1% and 3%.

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



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

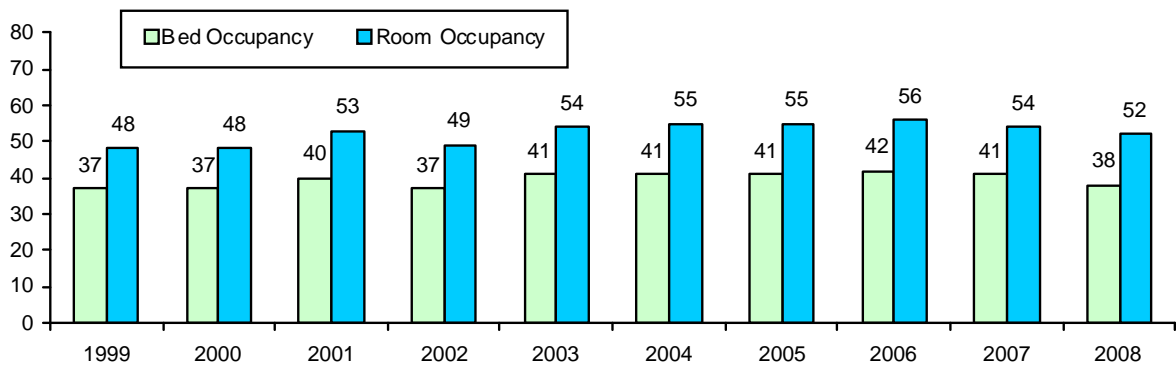
E. All Serviced Accommodation

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

Annual Average Bed and Room Occupancy

Both the annual average bed and room occupancy rates for all serviced accommodation were lower in 2008 than those recorded in the previous year. At 38%, the annual bed occupancy rate is three percentage points lower than in 2007 (41%) and is the lowest rate recorded since 2003. The average room occupancy rate decreased in 2008 to 52% from 54% in 2007 and is again, the lowest rate recorded since 2003.

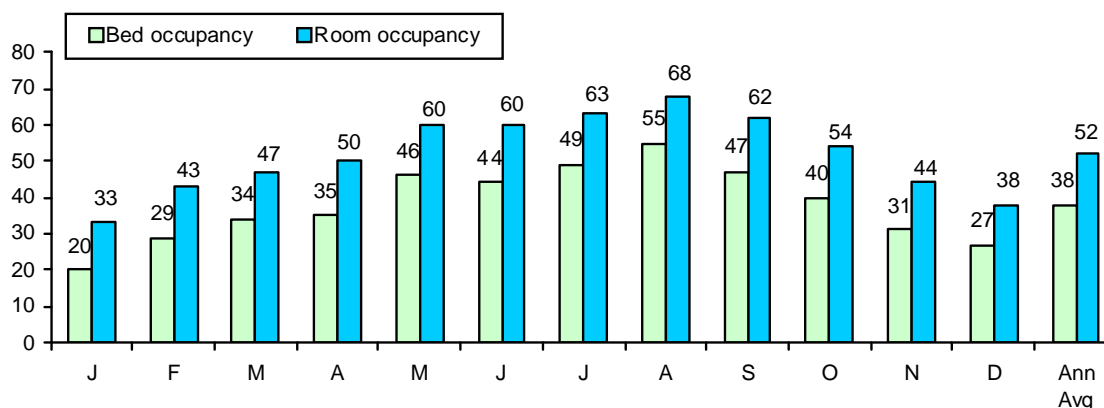
Figure E-1 - Serviced Accommodation - Trends in Occupancy Rates - Annual Averages (%)



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 E-2 below.

Figure E-2 – All Serviced Accommodation - Monthly Bed & Room Occupancy - 2008 (%)



In 2008, the average bed and room occupancy rates recorded for all serviced accommodation peaked during the summer month of August (55% and 68% respectively). An increase of five percentage points in the average bed occupancy rate and four in the average room occupancy rate were recorded between February and March, which indicates the impact of the Easter Holiday period which fell in March in 2008.

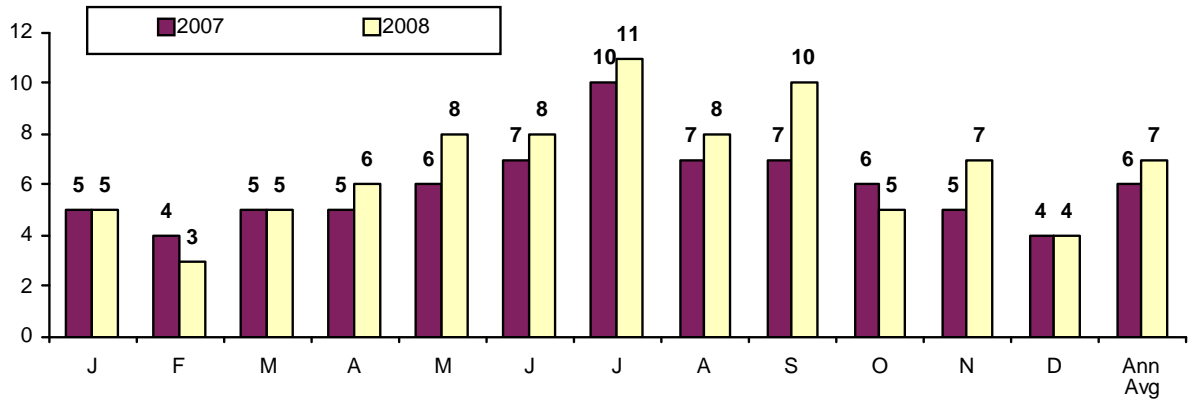
Percentage of Overseas Guests

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.

From the start of 2008, arrivals information for both UK and Overseas guests was no longer collected, which has affected the way data for overseas respondents 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, we have presented the proportion of overseas stays 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, we have reduced the amount of trended information presented for overseas guests and focus in this report on trended 2007 data versus the latest 2008 results.

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



For the majority of months, the percentage of overseas bednights was slightly higher in 2008 than the comparative figures for 2007. For example, in September, the 2008 overseas bednights figure was 10% compared to 7% for the same month in 2007.

F. Self Catering Cottages and Apartments

This section outlines the key occupancy level results for self catering accommodation cottages and apartments. This section 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 these. For this reason, it is not possible to make trended comparisons between 2008 and previous years.

Sample Size

Table F-1 overleaf illustrates response levels to the survey throughout 2008 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.

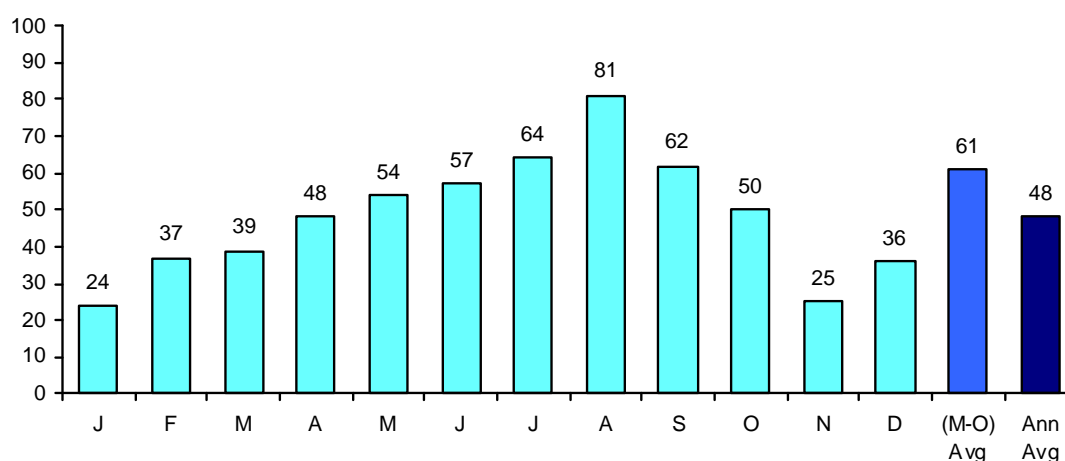
Table F-1 - Sample Size – Self Catering Cottages and Apartments

	Number of properties		
	Making Returns	Closed	Analysis Sample
January	1758	115	1643
February	1685	120	1565
March	1873	71	1802
April	1702	4	1698
May	1667	0	1667
June	1679	0	1679
July	1574	1	1573
August	1562	1	1561
September	1226	0	1226
October	583	5	578
November	771	99	672
December	799	96	703
Average	1407	43	1364

On average, 1,407 returned forms were received every month, providing an average sample base size of 1,364 to analyse.

Monthly Unit Occupancy

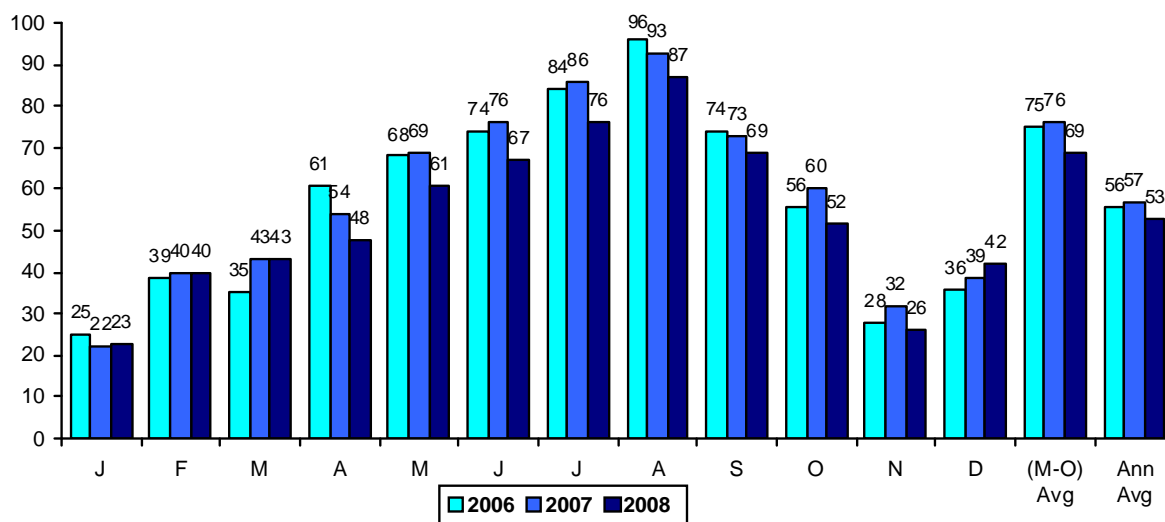
Figure F-1 below presents annual occupancy rates for 2008 across both independent and agency operators.

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

There was considerable variation in occupancy levels throughout the year reflecting the seasonal nature of this accommodation sector. Average unit occupancy increased from 24% in January to a peak of 81% in August before falling to 25% in November. Average unit occupancy levels increased slightly in December to 36%, most likely due to the increased demand during the Christmas and New Year holiday period.

Figure F-2 below presents the annual 2008 occupancy rates for independent operators. As described earlier in the report, data from 2006 and 2007 has also been provided to illustrate trends over the last couple of years.

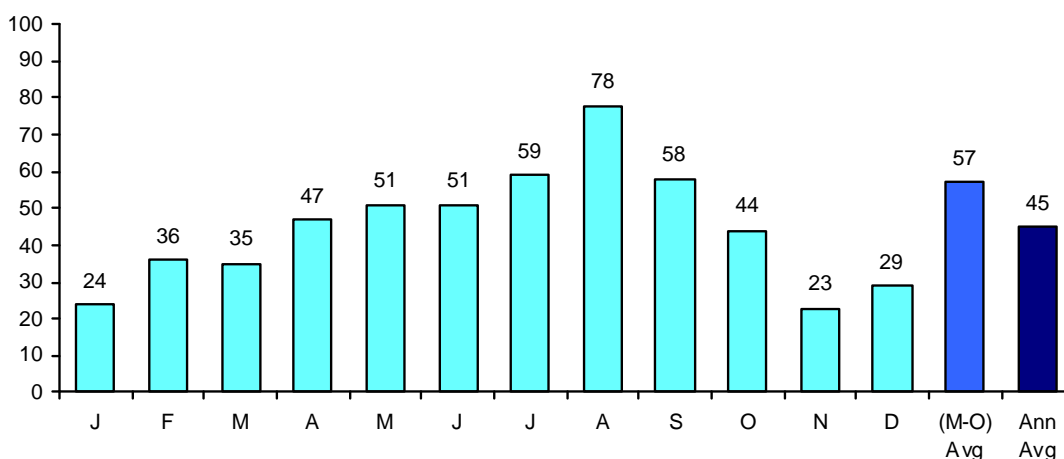
Figure F-2 - Monthly Unit Occupancy – Cottages and Apartments - Independent (%)



The average unit occupancy rate for independent operators in 2008 was 53% - 4% below that recorded in 2007. With the exception of January and December, occupancy figures across all months were equal to or lower than 2007. Reflecting the beginning of the economic slowdown, rising fuel and living costs and generally poor summer weather throughout the UK, a trend appears from May onwards whereby rates are lower (by as much as 10% in July compared to 2007). Similar findings, albeit with less variation, were evident in the serviced accommodation sector.

Figure F-3 below presents annual occupancy figures for self-catering accommodation let by agencies.

Figure F-3 - Monthly Unit Occupancy – Cottages and Apartments - Agency (%)



The average annual occupancy rate for agency let self-catering accommodation was 45%. Across the peak tourism months of May to October this figure rose to 57%. A similar trend to the independent operators was recorded with rates rising from 24% in January to a peak of 78% in August before decreasing to 23% in November. As with the independent operators – December observed a 6% increase over November reflecting the Christmas and New Year holiday season.

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 2008 independent occupancy figures alongside comparable 2007 and 2006 independent rates. A table below each chart illustrates the 2008 combined (independent and agency) occupancy figures for each region.

Figure F-4 - Monthly Unit Occupancy – North Wales – Independent (%)

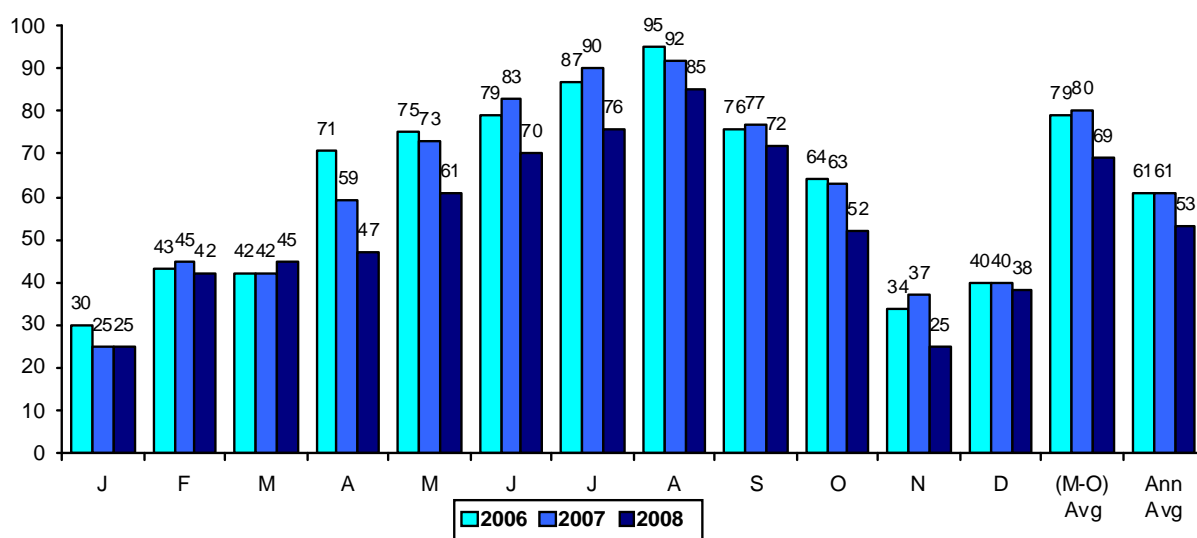


Table F-2 - Monthly Unit Occupancy – North Wales – 2008 ALL (%)

Unit Occupancy													
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	(M-O) Avg	Ann Avg
21	41	36	49	49	56	59	68	56	48	23	32	56	45

Overall, North Wales recorded the lowest annual occupancy rates (45%). The region also recorded the largest decrease (based on independent operators) compared to 2007 – down 8%.

Figure F-5 - Monthly Unit Occupancy – Mid Wales – Independent (%)

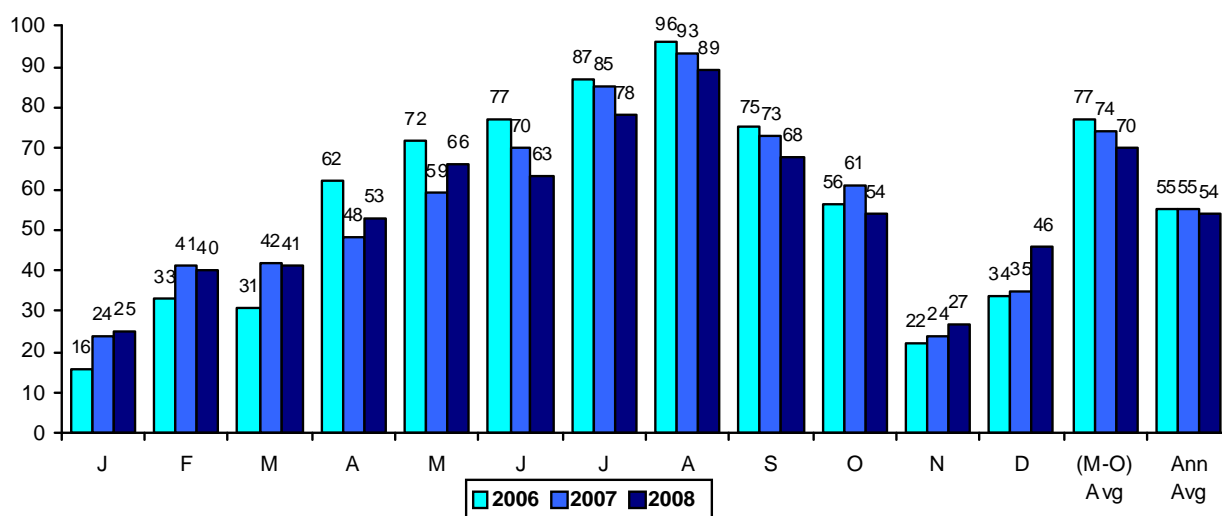


Table F-3 - Monthly Unit Occupancy – Mid Wales – 2008 ALL (%)

Unit Occupancy													
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	(M-O) Avg	Ann Avg
6	18	32	46	63	65	61	84	68	54	27	46	66	48

Mid Wales reported a particularly low occupancy rate in January (6%) – much lower than the average for the other regions (between 21-42%). Independent operators reported a small 1% decline compared to 2007 rates.

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

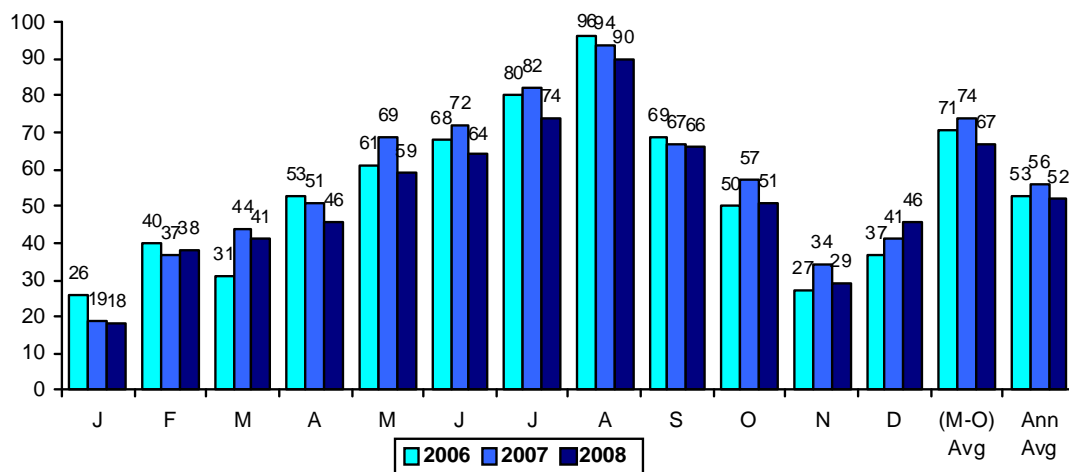


Table F-4 - Monthly Unit Occupancy – South Wales – 2008 ALL (%)

Unit Occupancy													
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	(M-O) Avg	Ann Avg
41	51	48	46	54	53	72	90	66	51	29	46	64	54

South Wales observed one of the highest occupancy rates recorded throughout the year – 90% in August. It was the only region where November recorded a lower occupancy rate than January (29%). Overall rates across independent operators fell by 4% compared to 2007.

Figure F-7 - Monthly Unit Occupancy – South East Wales – Independent (%)

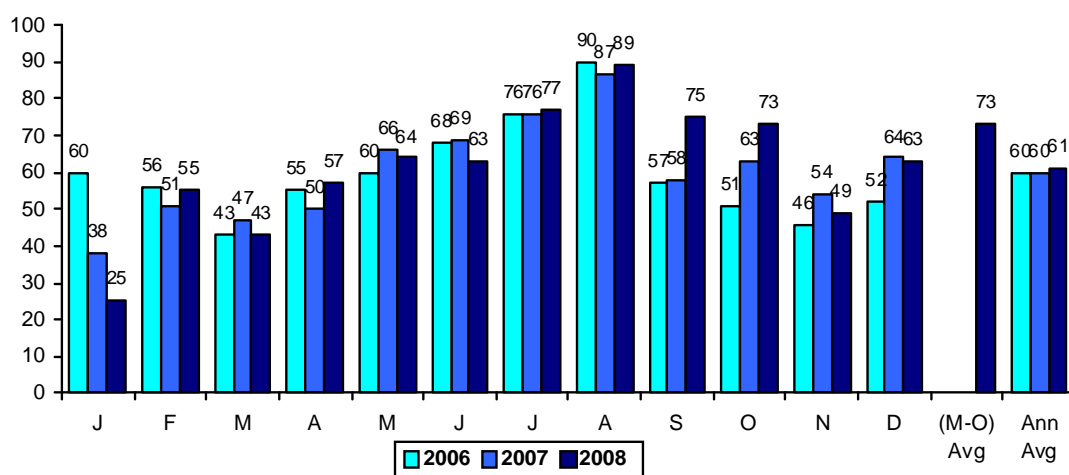


Table F-5 - Monthly Unit Occupancy – South East Wales – 2008 ALL (%)

Unit Occupancy													
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	(M-O) Avg	Ann Avg
25	56	47	57	64	63	77	89	75	73	49	63	73	61

The South East region reported the highest annual rates – 61%. Reflecting this, it was the only region to report an increased occupancy rate (for Independent operators) over 2007 – a 1% increase. September and October recorded strong performances for Independent operators with rates 17% and 10% higher than the equivalent time period compared to the previous year.

Figure F-8 - Monthly Unit Occupancy – South West Wales – Independent (%)

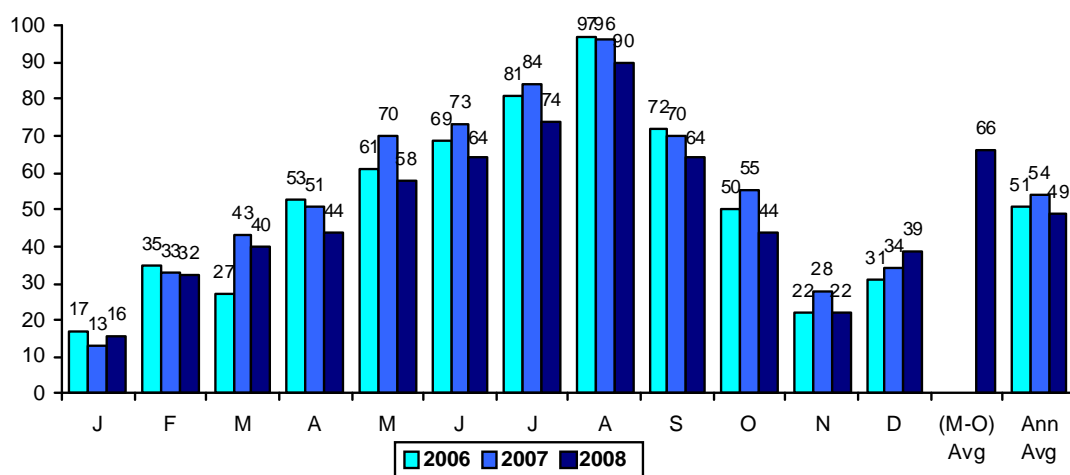


Table F-6 - Monthly Unit Occupancy – South West Wales – 2008 ALL (%)

Unit Occupancy													
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	(M-O) Avg	Ann Avg
42	50	49	45	53	53	72	90	66	44	22	39	63	52

South West Wales was another region to record high occupancy rates in the peak summer month of August (90%). When compared to 2007 – independent operators reported generally lower rates throughout the year resulting in a 5% decrease over 2007.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for properties located in coastal and inland locations. Table F-7 below illustrates occupancy rates for independent operators along with trended 2006 and 2007 data.

Table F-7 - Monthly Unit Occupancy by Location - Independent (%)

	Coastal locations Unit Occupancy (%)			Inland locations Unit Occupancy (%)		
	2006	2007	2008	2006	2007	2008
January	25	20	21	24	24	22
February	38	40	44	42	40	40
March	31	47	47	40	37	41
April	63	60	55	59	45	50
May	73	74	67	61	61	63
June	81	83	72	61	66	64
July	90	90	78	75	79	77
August	97	95	93	95	91	89
September	79	78	72	64	65	69
October	60	62	49	51	56	55
November	26	29	23	31	38	29
December	33	36	42	42	44	44
Annual Average	58	60	55	54	54	54

Coastal locations outperformed inland locations in the last couple of years (with independent operators), however, in 2008, a small 1% difference was recorded between the two. Self-catering accommodation in coastal locations recorded occupancy rates 4% higher than inland locations in August. However, the situation is reversed during some of the winter months with inland locations reported higher occupancy rates during November and December (6% higher in November and 2% higher in December).

Table F-8 - Monthly Unit Occupancy by Location - ALL (%)

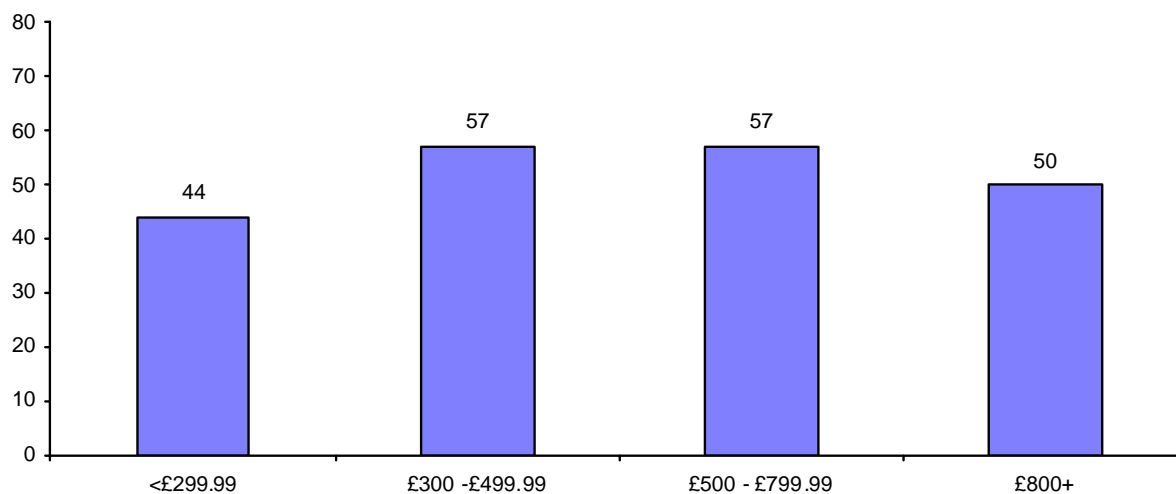
	Coastal locations	Inland locations
	Unit Occupancy (%)	Unit Occupancy (%)
	2008	2008
January	21	24
February	44	41
March	47	42
April	55	49
May	66	60
June	72	64
July	78	74
August	93	86
September	72	67
October	49	50
November	23	24
December	42	39
Annual Average	55	52

When comparing occupancy rates by location across all self-catering accommodation (both independent and agency) – coastal locations observed higher rates than inland - a 3% difference. The off-peak months of January, October and November were the only months when a higher rate was recorded for inland locations.

Occupancy by Tariff

A new reporting element has been 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 4a to this section of the report.

The annual average unit occupancy rates by tariff are presented in Figure F-9 overleaf.

Figure F-8 Annual Average Unit Occupancy by Tariff (%)

Properties charging £300-£499.99 and £500-£799.99 recorded the highest occupancy levels in 2008 (both 57%).

Table F-9 below illustrates monthly occupancy rates across each tariff band. More detail can be found under Appendix 4a.

Table F-9 - Average Monthly Unit Occupancy by Tariff (%)

	Tariff			
	<£299.99	£300 -£499.99	£500 - £799.99	£800+
January	24	19	25	3
February	36	40	39	61
March	38	46	52	43
April	46	65	53	0
May	51	72	76	64
June	48	75	69	68
July	59	77	80	77
August	77	83	94	93
September	42	75	77	73
October	48	62	57	51
November	26	31	19	16
December	30	44	46	47
Annual Average	44	57	57	50

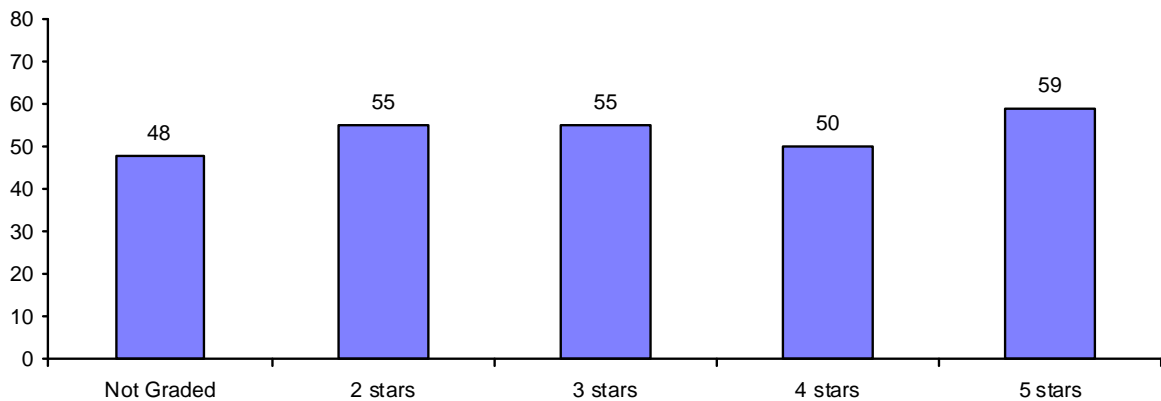
A largely similar trend in all four tariff bands was recorded across the year. Accommodation with a tariff of £800+ recorded occupancy rates higher in December relative to the annual average – this is most likely due to increased demand for properties at the higher end of the

market over the Christmas and New Year holiday period. Properties in the £300-£499.99 tariff band reported a strong Easter holiday period in April (65%).

Occupancy by Grading

Occupancy rates for properties were analysed according to their membership of Visit Wales Grading Scheme. Figure F-10 below shows the annual average unit occupancy rates by grading.

Figure F-10 - Annual Average Unit Occupancy by Grading (%)



There is a positive relationship between the level of grading and occupancy levels. Five star properties recorded the highest average unit occupancy rate, 4% higher than two and three star properties. Properties with a four star grading reported the lowest occupancy rates. Please note that no properties in this year's survey had a one star grading.

Table F-10 overleaf provides a breakdown of monthly occupancy rates by grading.

Table F-10 - Average Monthly Unit Occupancy by Grading (%)

	Star Grading				
	Unit Occupancy (%)				
	2 Star	3 Star	4 Star	5 Star	Not graded
January	24	22	21	21	26
February	46	51	37	44	35
March	48	47	36	49	40
April	59	58	43	57	45
May	61	70	54	72	57
June	63	68	58	77	58
July	72	71	74	84	67
August	91	86	88	95	86
September	71	68	63	78	67
October	51	49	49	59	46
November	36	28	26	26	19
December	40	46	48	41	33
Annual Average	55	55	50	59	48

Occupancy rates for five star graded properties reported higher than average figures during the peak summer months of June to September but lower rates during the Christmas and New Year holiday period in December. Four star properties – which reported the lowest occupancy rates across the year on average - recorded the highest occupancy rates in December (48%).

G. 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 G-1 below details response levels to the survey throughout 2008 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.

Table G-1 – Sample Size – Caravan Holiday Homes

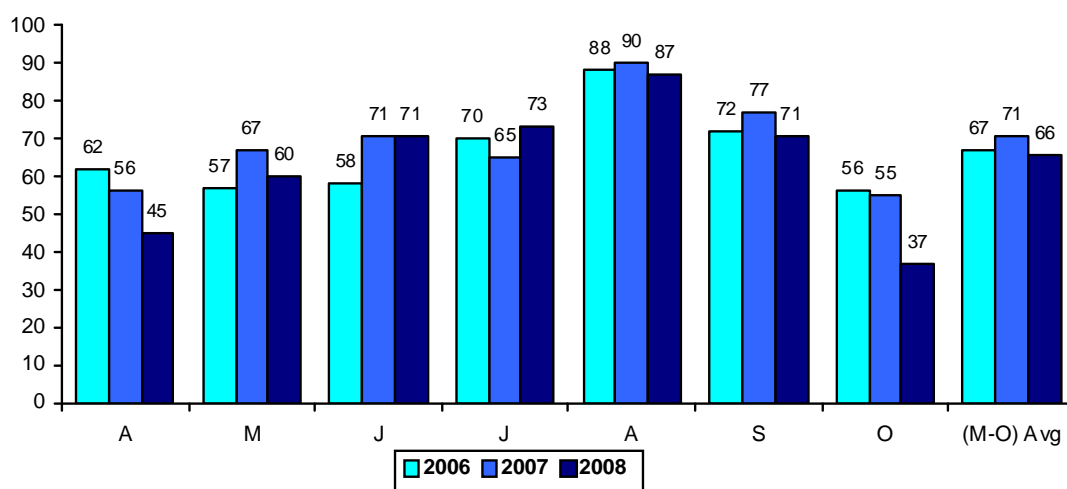
	Number of properties		
	Making Returns	Closed	Analysis Sample
January	47	45	2
February	36	35	1
March	38	13	25
April	28	0	28
May	30	0	30
June	39	0	39
July	33	0	33
August	33	0	33
September	34	0	34
October	28	3	25
November	36	33	3
December	41	38	3
Average	35	14	21

On average, 35 returned forms were received every month, providing an average sample base size of 21 to analyse.

Monthly Unit Occupancy

Figure G-1 below presents the occupancy rates for 2008 for caravan holiday homes. As stated in the methodology section above, occupancy figures were collected during 2008 across all months. Due to the seasonality of this sector, very few returns were received outside of the main tourist season (April – October) – therefore, monthly results have only been presented below for this time period and in 2009 occupancy figures will only be collected during March to October.

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



There was considerable variation in occupancy levels throughout the year. Across the six months' peak period, occupancy figures ranged from a high of 87% in August to 37% in October.

When compared to 2006 and 2007, occupancy is down in 2008 across the majority of these months (July being the one month that recorded an increase over 2007), with a particular decrease in levels reported in October (-18% compared to October 2007).

An observation of the year can be seen across the May to October average where a rate of 66% was recorded - 5% down on 2007.

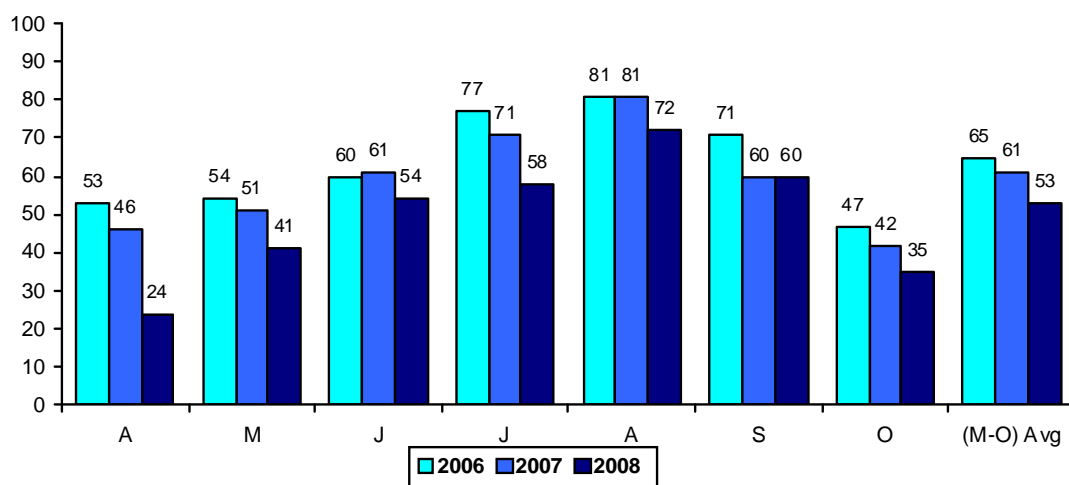
As with other accommodation sectors, the fall in occupancy rates for caravan holiday homes is likely to be the result of a combination of generally poor weather throughout the year (but particularly in the peak summer months), rising living costs and uncertainty among visitors due to the impending economic recession.

Regional Trends

This section of the report summarises the occupancy levels for caravan holiday homes across the five different regions of Wales. Please note that the sample sizes at a regional level are low and so results should be interpreted with caution.

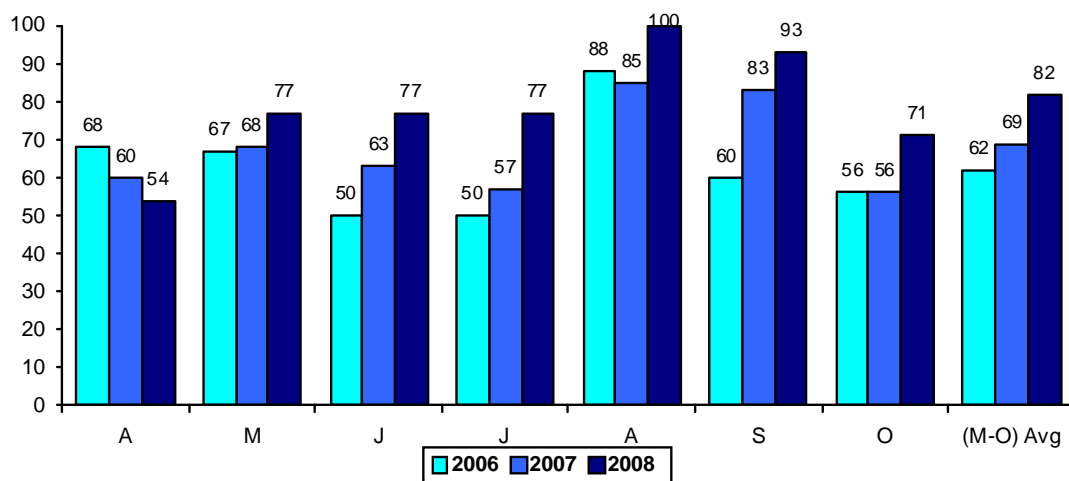
Note: There was only one returned occupancy form for the South East region, so results not presented.

Figure G-2 - Monthly Unit Occupancy – Caravan Holiday Homes – North Wales (%)



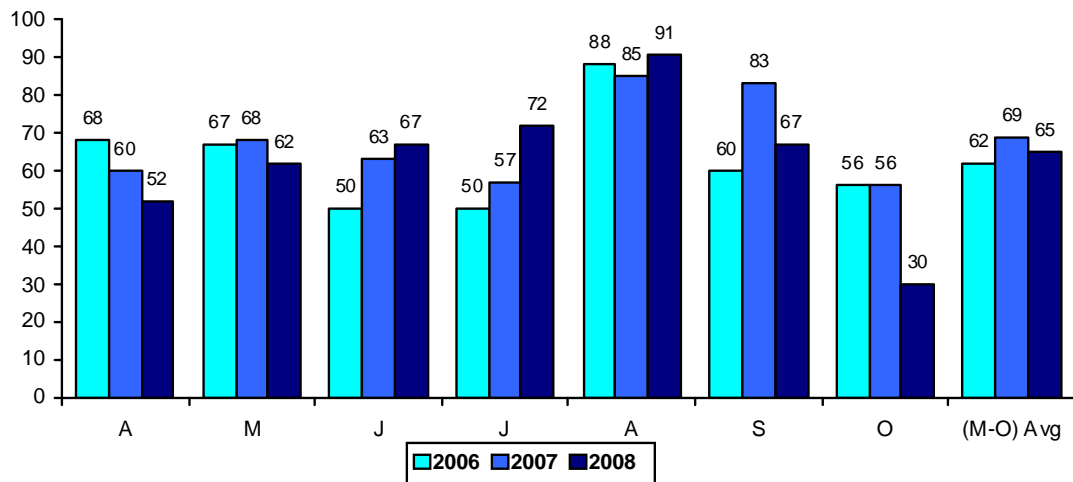
Compared to the other regions, the North tended to have lower occupancy rates, an average during May to October of 53%.

Figure G-3 - Monthly Unit Occupancy – Caravan Holiday Homes – Mid Wales (%)



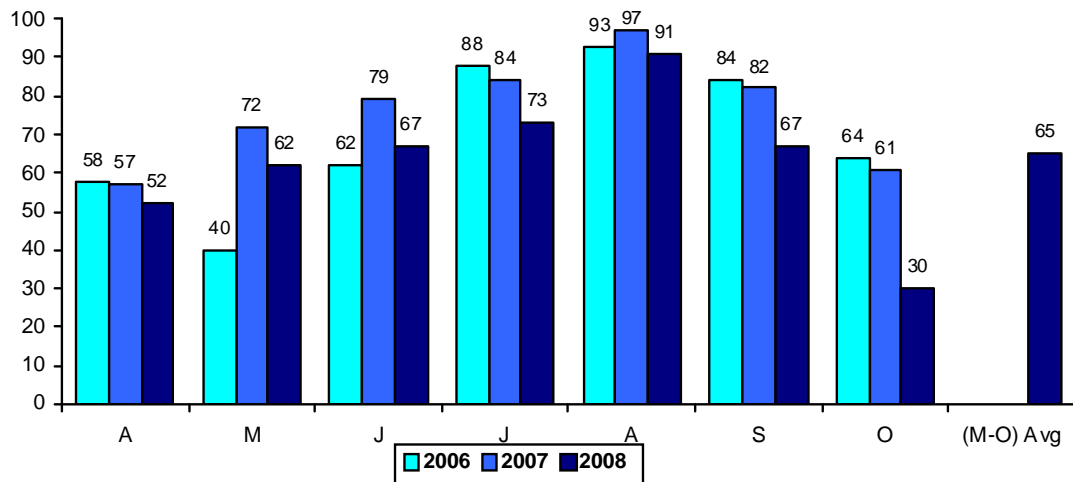
Mid Wales recorded some of the highest occupancy figures (100% in August) for an average across May to October of 82% - 13% up on 2007.

Figure G-4 - Monthly Unit Occupancy – Caravan Holiday Homes – South Wales (%)



South Wales has observed a large increase in occupancy during July – a rise of 22% since 2006.

Figure G-5 - Monthly Unit Occupancy – Caravan Holiday Homes – South West (%)



The South West region also recorded high levels of occupancy during August – 91%.

Occupancy by Location – Coastal v Inland

Occupancy data was analysed for caravan holiday homes located in coastal and inland locations. Table G-2 overleaf illustrates occupancy rates for caravan holiday homes along with trended 2006 and 2007 data.

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

	Coastal locations			Inland locations		
	Static Occupancy (%)			Static Occupancy (%)		
	2006	2007	2008	2006	2007	2008
April	62	57	52	58	50	24
May	57	67	63	57	59	48
June	58	73	74	45	49	48
July	70	66	75	80	62	61
August	90	92	84	59	73	93
September	93	80	73	69	44	61
October	58	56	36	26	43	41
May-Oct Average	68	72	68	56	55	59

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

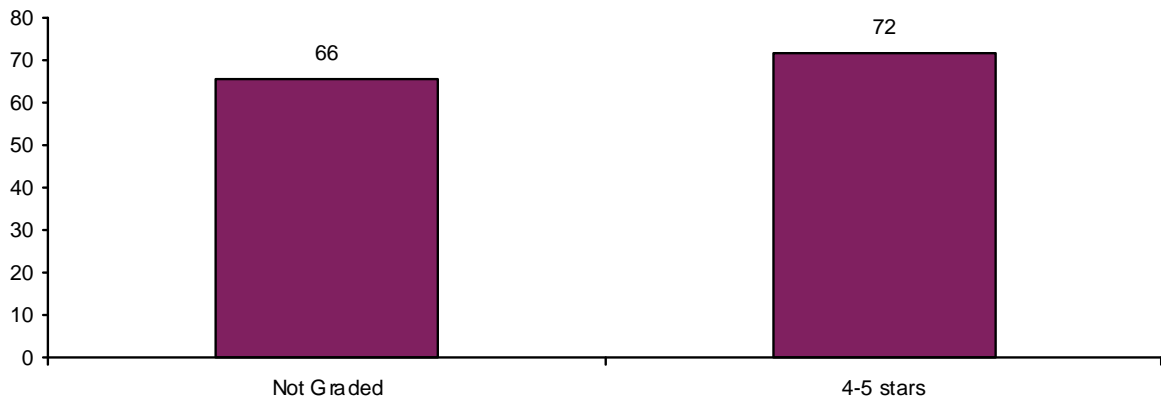
Reversing the trend observed between 2006 and 2007, occupancy rates for coastal locations recorded a decrease in 2008 (down 4%) whereas inland locations recorded a 4% increase.

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 time period. Results should be interpreted with a degree of caution due to the low sample size.

Figure G-6 overleaf shows the annual average unit occupancy rates by grading.

Figure G-6 – May to October Average Unit Occupancy by Grading – Caravan Holiday Homes (%)



Similar levels of occupancy were reported for caravan holiday homes between May and October for static homes that were not graded (66%) or those with a four or five star Visit Wales grading (72%).

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

Table G-3 below provides a breakdown of monthly occupancy rates by grading.

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

	Unit Occupancy (%)		
	1-3 Star	4-5 Star	Not graded
January	-	*	*
February	-	*	*
March	-	34	10
April	-	42	51
May	-	65	63
June	-	66	74
July	-	74	74
August	-	95	86
September	-	73	73
October	-	56	26
November	-	*	*
December	-	*	*
May – October Average	-	72	66

* Low sample size

Occupancy rates for four and five star graded properties reported particularly high occupancy during August.

H. 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 April to October months inclusive, reflecting the closure of the majority of the sites during the winter months.

Sample Size

Tables H-1 below details response levels to the survey throughout 2008 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.

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

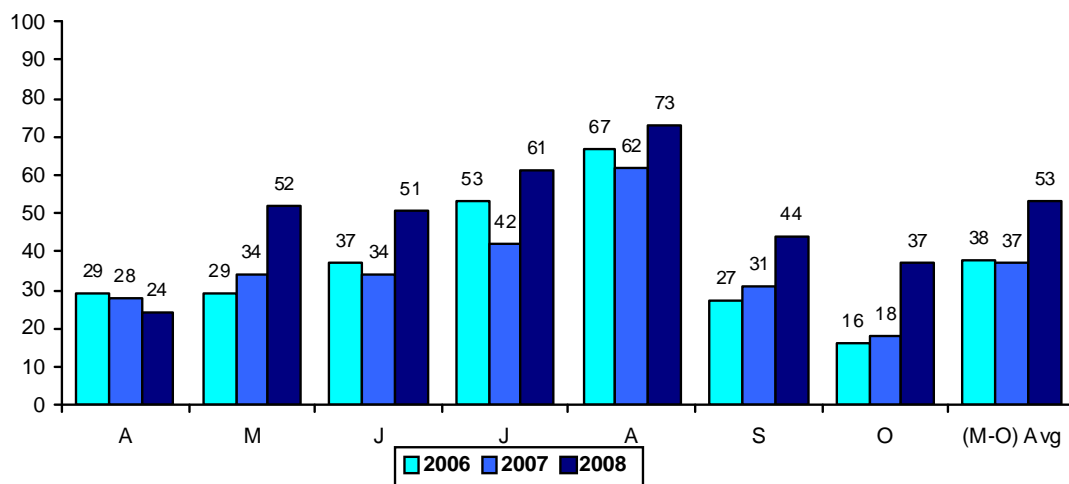
	Number of properties		
	Making Returns	Closed	Analysis Sample
January	85	69	16
February	73	57	16
March	76	16	60
April	70	1	69
May	72	1	71
June	79	1	78
July	72	1	71
August	75	1	74
September	68	0	68
October	44	2	42
November	78	73	5
December	87	83	4
Average	73	25	48

On average, 73 returned forms were received every month, providing an average sample base size of 48 to analyse.

Monthly Unit Occupancy

Figure H-1 below presents annual occupancy rates for 2008 for touring caravan and camping parks. Due to the seasonality of this sector, very few returns were received outside of the main tourist season (April – October) – therefore, monthly results have only been presented below for this time period and comparisons should be made across the season based on the column displaying May to October returns.

Figure H-1 - Monthly Unit Occupancy – Touring Caravan and Camping Parks (%)

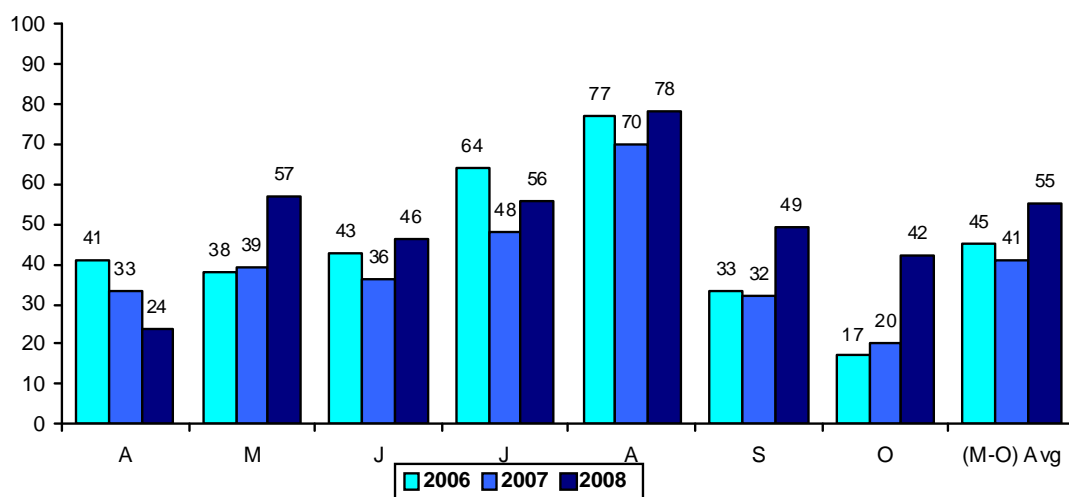


Occupancy levels across the main season – May to October – recorded a strong increase on 2007 – up 16%. The relatively small sample sizes for this sector, along with possible survey variation between years, should be taken into account when comparing data between years. Even so, it is evident that this sector has performed well in 2008 compared to other accommodation sectors.

Regional Trends

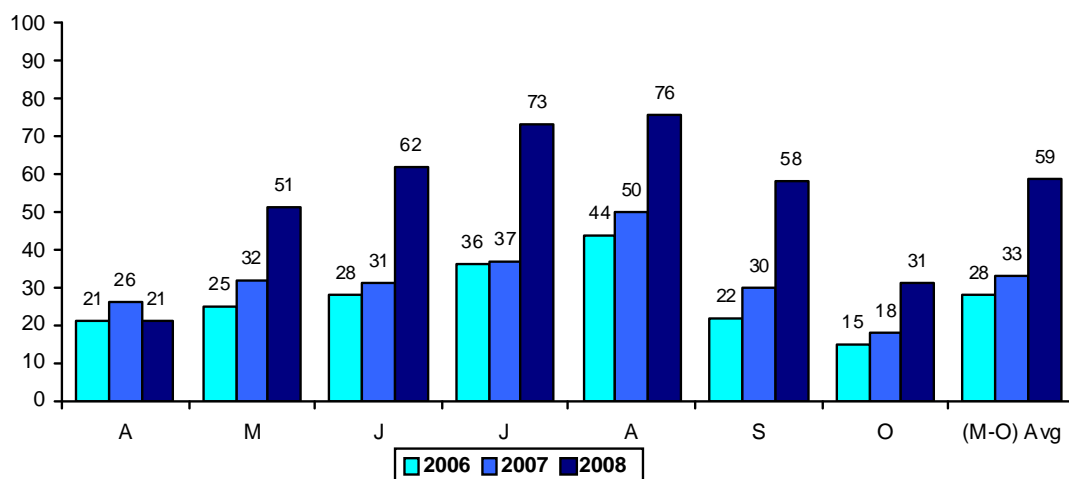
This section of the report summarises the occupancy levels for touring caravan and camping parks across the five different regions of Wales. Please note that the sample sizes at a regional level are small so results should be interpreted with caution.

Figure H-2 - Monthly Unit Occupancy – Touring Caravan and Camping Parks – North Wales (%)



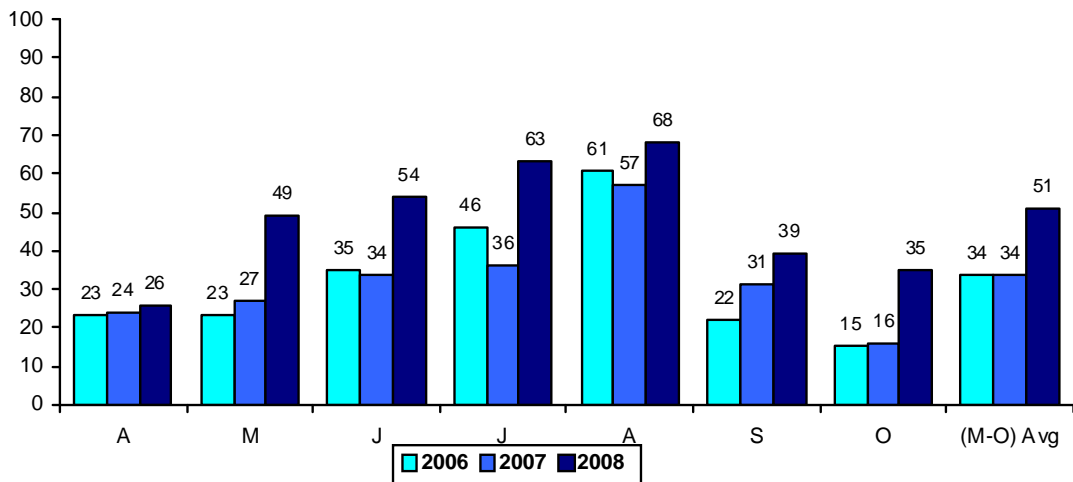
The North region reported a strong August (78%) and the second highest seasonal (May to October) occupancy across the regions – 55%.

Figure H-3 - Monthly Unit Occupancy – Touring Caravan and Camping Parks – Mid Wales (%)



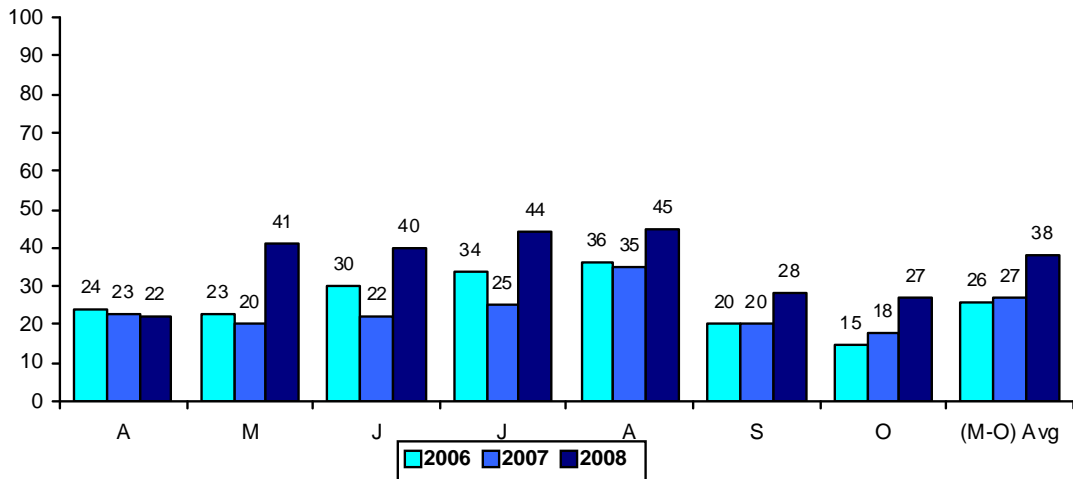
Mid Wales recorded the highest seasonal occupancy rates – 59%. This is 26% higher than that recorded in 2007. Although caution should be used when interpreting these findings due to the low sample size at a regional level, and to a lesser degree, an element of survey variation, this finding would suggest that Mid Wales reported a strong season for this sector.

Figure H-4 - Monthly Unit Occupancy – Touring Caravan and Camping Parks – South (%)



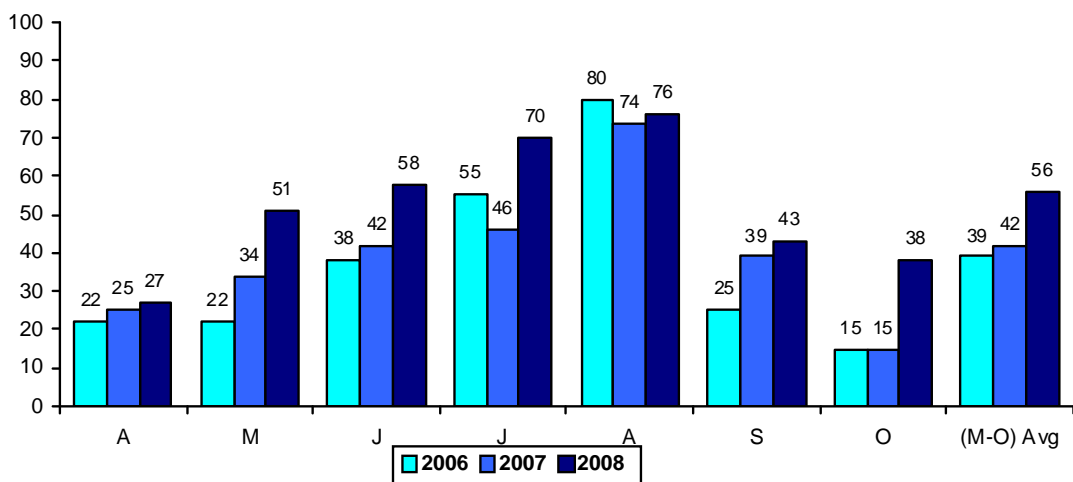
The South observed a +17% increase during May to October compared to 2007.

Figure H-5 - Monthly Unit Occupancy – Touring Caravan and Camping Parks – South East (%)



The South East observed the lowest seasonal occupancy figures – 38%.

Figure H-6 - Monthly Unit Occupancy – Touring Caravan and Camping Parks – South West (%)



Occupancy by Location – Coastal v Inland

Occupancy data was analysed for touring caravan and camping parks located in coastal and inland locations. Table H-2 below illustrates occupancy rates for caravan holiday homes along with trended 2006 and 2007 data.

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

	Coastal locations			Inland locations		
	Touring Occupancy (%)			Touring Occupancy (%)		
	2006	2007	2008	2006	2007	2008
April	32	28	21	24	28	30
May	32	37	50	24	29	56
June	40	37	47	30	30	59
July	61	46	60	36	34	62
August	76	72	76	44	45	68
September	29	33	36	23	28	48
October	15	17	42	16	21	37
May-Oct Average	42	40	52	29	31	55

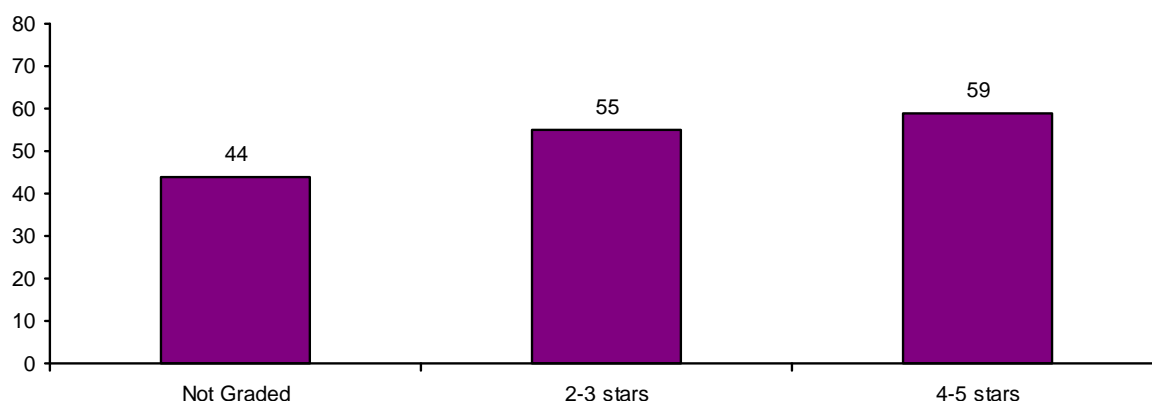
Please note that the sample size, particularly for touring caravans and camping parks based in coastal locations, is low so these results should be interpreted with caution.

Both coastal and inland locations reported general increases when analysed on a seasonal basis over previous years. This is particularly evident for inland locations which reported a 24% rise on 2007.

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 time period.

Figure H-7 overleaf shows the annual average unit occupancy rates by grading.

Figure H-7 – May - October Average - Unit Occupancy by Grading - Touring caravan and camping parks (%)

There is a positive relationship between the level of grading and occupancy levels. Four and five star properties recorded the highest average unit occupancy rate between May and October, 4% higher than two and three star properties.

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

Table H-3 below provides a breakdown of monthly occupancy rates by grading.

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

	Star Grading		
	2-3 stars	4-5 stars	Not graded
January	*	*	8
February	*	14	29
March	24	26	17
April	30	31	23
May	49	60	47
June	55	61	45
July	70	69	44
August	80	77	57
September	42	48	35
October	38	40	36
November	*	*	*
December	*	*	*
May – Oct Average	55	59	44

* Low sample size

A similar trend was recorded across the year between two/three and four/five star graded touring caravan and camping parks. Please take care when interpreting results due to the low sample size when analysed at this level.

I. Hostels and Bunkhouses

Sample Size

Table I-1 details response levels to the survey throughout 2008 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.

Table I-1 – Sample Size – Hostels and bunkhouses

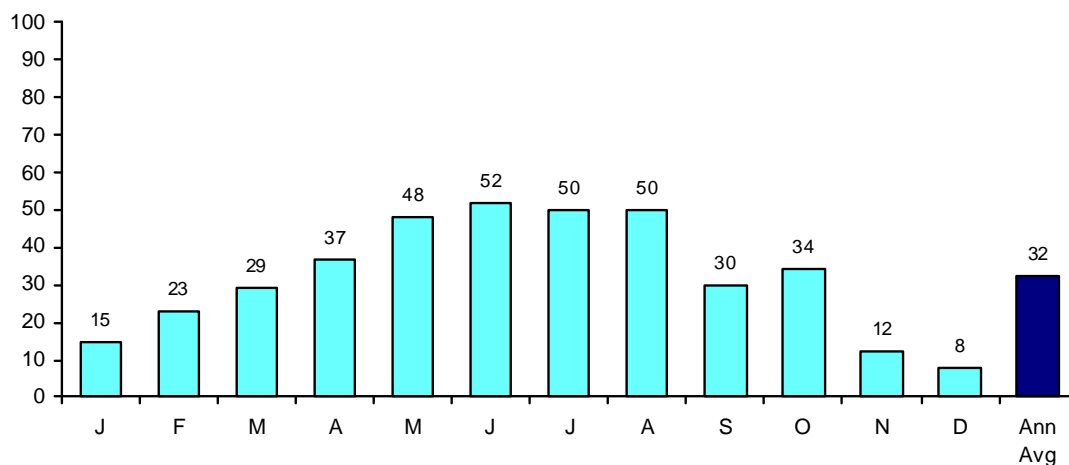
	Number of properties		
	Making Returns	Closed	Analysis Sample
January	13	2	11
February	31	10	21
March	27	2	25
April	27	0	27
May	26	0	26
June	28	1	27
July	28	0	28
August	29	0	29
September	29	0	29
October	27	0	27
November	28	0	28
December	27	0	27
Average	27	1	25

On average, 27 returned forms were received every month, providing an average sample base size of 25 to analyse.

Monthly Bed Occupancy

Figure I-1 below presents the monthly and annual bed occupancy for hostels in 2008.

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

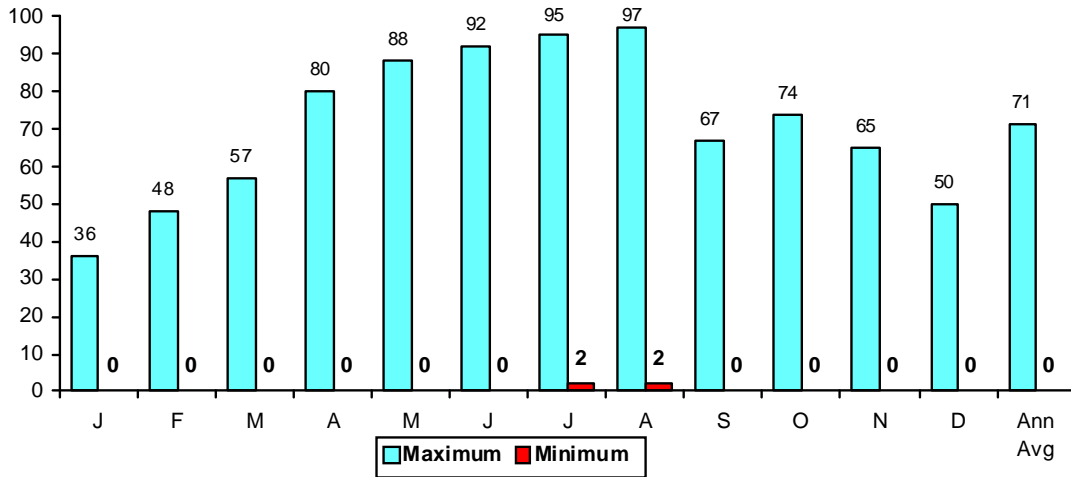


Bed occupancy increased from 15% in January to a maximum of 52% in June, before falling to 8% in December. Occupancy rates declined significantly between August and September (a fall of 20%) and October and November (22%). Interestingly, demand for hostel accommodation was slightly higher in October than September (30% v 34%), which may have been influenced by the half term break. October also reported strong demand across the hotel and guest house and bed and breakfast sector. Across the whole of 2008, the annual average bed occupancy rate was 32%.

Maximum and Minimum Monthly Bed Occupancy

Figure I-2 below presents the maximum and minimum occupancy rates recorded during 2008. Further information is provided within Appendix 4b on maximum/minimum analysis per region.

Figure I-2 – Maximum/Minimum Monthly Bed Occupancy (%)

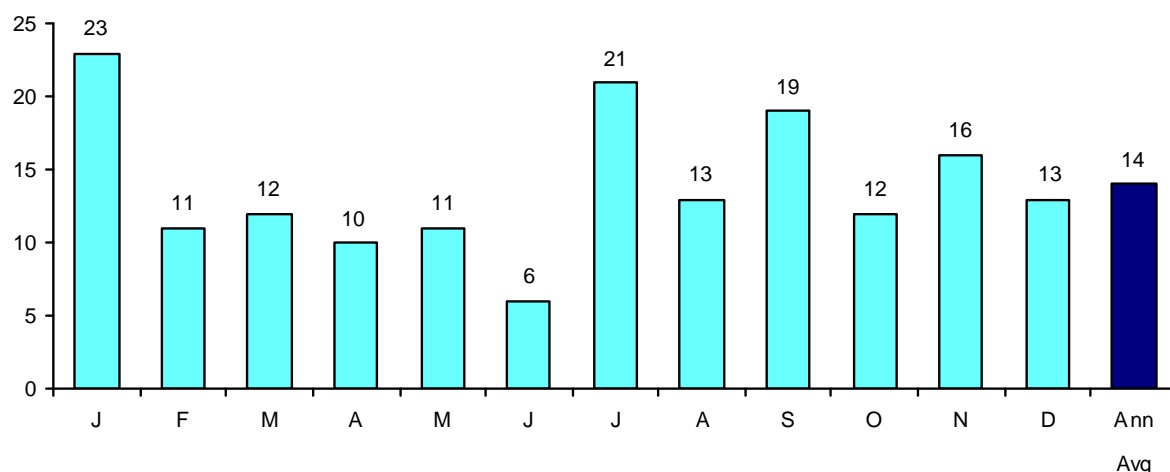


Reflecting the overall monthly occupancy figures, the maximum occupancy rates were observed between April and August. Clearly, October was a strong month for the hostel sector with maximum rates higher than September.

Overseas Occupancy

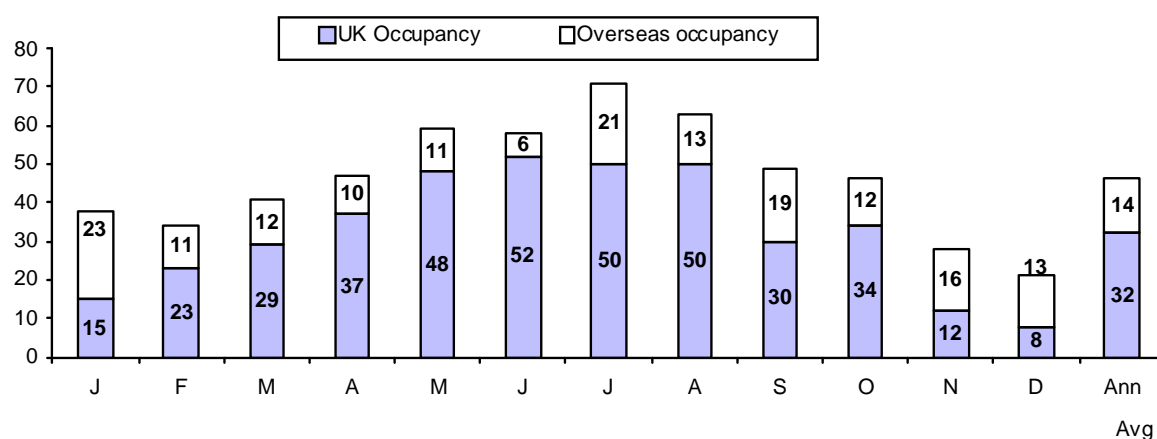
On the monthly occupancy form, operators are asked to identify the number of guests staying in the hostel each night and their nationality; either UK or overseas. It should be noted that not all establishments provide this information – on average, 83% provided overseas occupancy rates (265 returned forms across the 12 months of the survey).

Figure I-3 - Overseas Occupancy – Percentage of Bed nights (%)



Overseas occupancy in the hostel sector remains relatively consistent throughout the year with the months of February through to June recording the lowest overseas occupancy levels. Overseas occupancy levels for hostels are higher than in any other accommodation sector, illustrating that this sector is particularly popular with the overseas market.

Figure I-4 – Overseas and UK Monthly Occupancy (%)

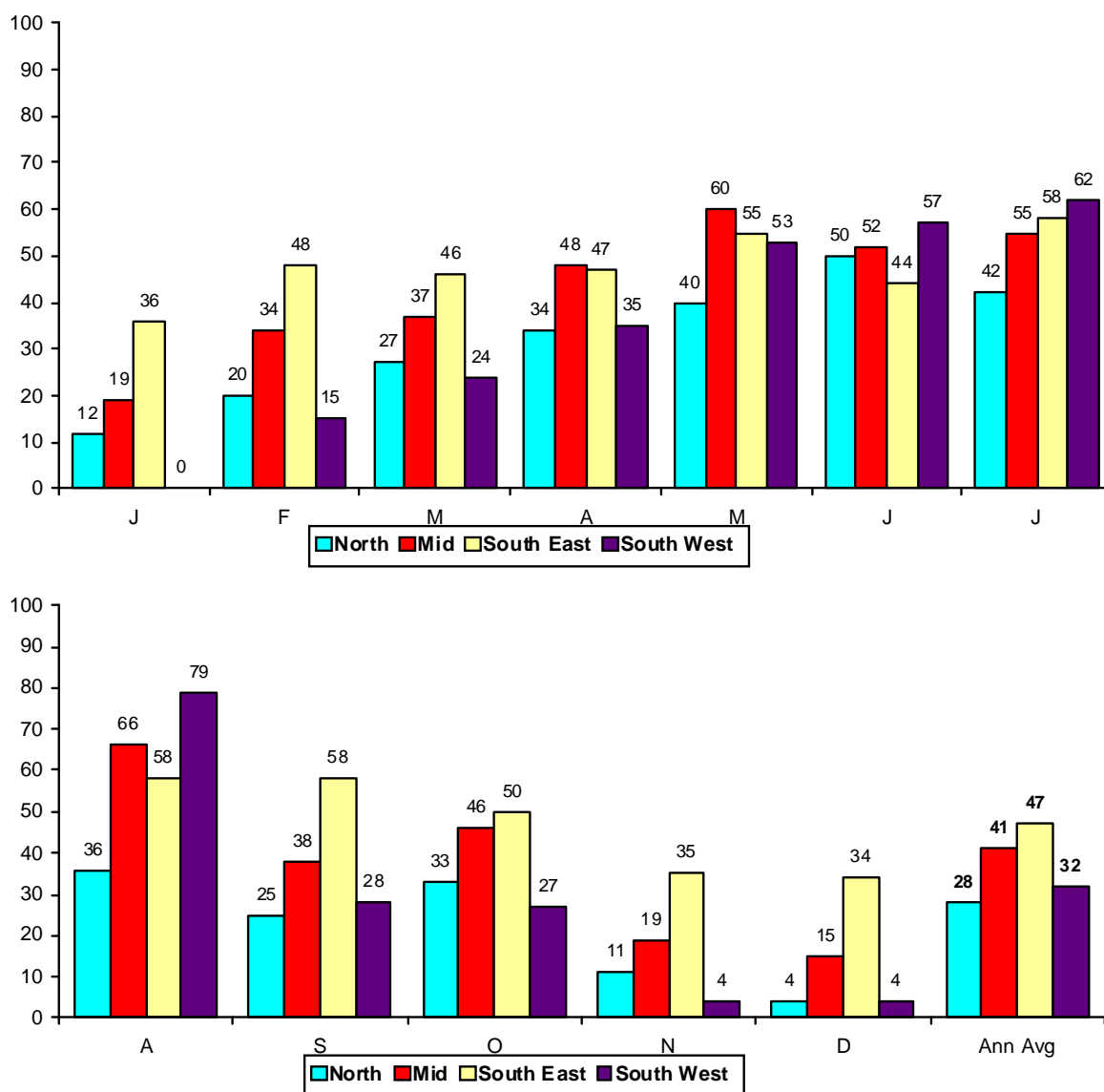


Highlighting the importance of the hostel sector amongst overseas visitors, overseas occupancy rates were higher than UK occupancy rates in the months of January, November and December. However, on average throughout the year the UK rates were higher than overseas rates.

Regional Trends

This section of the report summarises the occupancy levels for hostels across the four different regions of Wales. Please note that the sample sizes at an individual regional level are low and so results should be interpreted with caution. More detail available in Appendix 4b.

Figure I-5 - Monthly Unit Occupancy – Hostels (%)



The South East recorded the highest occupancy levels across the four regions and the North the lowest. The South West observed particularly high levels of occupancy in August; double that of hostels in the North.

Occupancy by Location – Hostels

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

Table I-2 - Monthly Unit Occupancy by Location Hostels (%)

	Coastal locations	Inland locations
	Bed Occupancy (%)	Bed Occupancy (%)
January	4	19
February	20	20
March	32	27
April	41	35
May	56	43
June	61	47
July	66	41
August	75	39
September	36	27
October	36	34
November	6	14
December	4	10
May-Oct Average	55	38
Annual Average	36	30

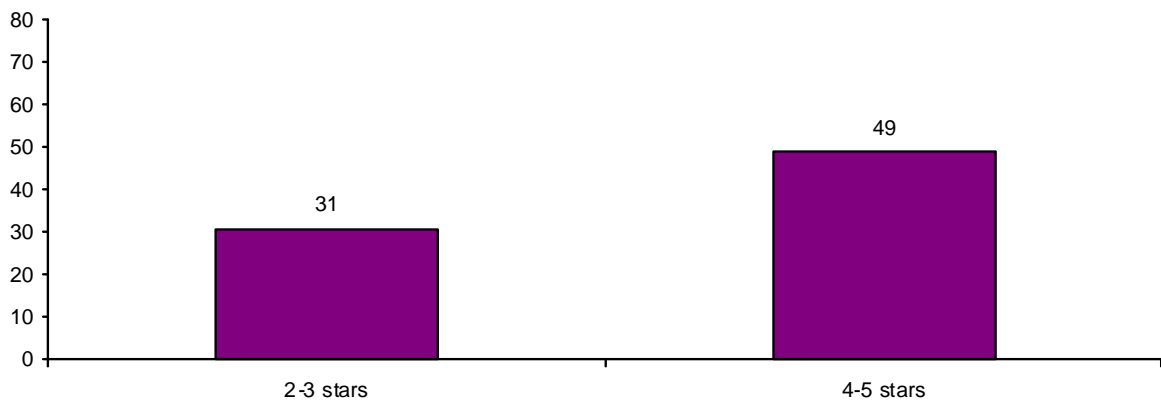
Hostels located in coastal locations reported annual occupancy rates 6% higher than those based in inland locations. A trend is evident with inland locations generally recording higher occupancy figures during the off-peak winter months and coastal locations during the peak summer months. Please note that the sample is low 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 I-5 below shows the annual average unit occupancy rates by grading.

Figure I-5 - Annual Average Unit Occupancy by Grading - Hostels (%)



As with touring caravans and camping parks, there is a positive relationship between the level of grading and occupancy levels. Four and five star properties recorded the highest average unit occupancy rate during 2008, 18% higher than two and three star properties. Please note that caution should be used when interpreting the results due to the low sample size.

Please note that no properties in this year's survey had a one star grading. The sample size was too low to analyse at a monthly level.

Appendix 1: Hotels

Appendix 1a - Hotels: Bed Occupancy 2008 (%)

	Bed occupancy									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
January	21	21	22	23	25	24	25	24	26	25
February	28	29	31	33	33	33	33	35	35	34
March	31	31	31	37	36	36	37	35	37	38
April	38	41	39	37	43	41	41	44	44	40
May	43	43	47	45	48	48	46	49	50	49
June	47	46	48	50	47	48	49	50	51	47
July	53	53	52	51	52	53	52	56	53	52
August	57	57	60	58	59	56	56	60	60	55
September	50	48	49	48	50	51	51	55	54	51
October	41	41	43	42	43	42	42	45	45	45
November	32	33	40	35	34	35	34	37	38	38
December	27	30	32	30	31	33	32	34	34	33
Annual Average	40	39	41	41	42	42	42	44	44	43

Appendix 1b - Hotels: Bed Occupancy 2008 (%)

	2008 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	25	34	38	40	49	47	52	55	51	45	38	33	43
North Wales	22	30	37	39	49	49	52	61	53	50	40	34	43
Mid Wales	24	32	35	37	46	42	51	54	48	38	34	26	39
South Wales	28	37	41	41	50	47	52	52	50	43	37	35	43
South East Wales	32	38	41	42	49	45	50	49	50	43	41	37	43
South West Wales	23	34	40	40	52	49	54	59	50	41	29	29	42
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	19	23	25	32	37	35	48	48	44	34	27	24	33
11-25 rooms	22	28	33	34	48	42	44	58	48	40	32	28	38
26-50 rooms	27	36	40	41	50	51	55	58	52	44	37	35	44
51-100 rooms	30	48	51	44	54	51	56	49	57	51	43	37	48
Over 100 rooms	28	37	47	48	56	57	61	64	55	54	49	42	50
Under £20	-	-	-	-	-	-	-	-	-	-	-	-	-
£20-£29.99	*	12	15	14	25	26	31	31	27	15	4	*	20
£30-£39.99	18	20	33	35	46	39	37	48	37	33	32	21	32
£40-£49.99	17	30	35	39	48	42	48	51	43	39	28	22	36
£50-£59.99	26	39	45	42	50	52	51	60	53	45	44	36	45
£60 & over	30	40	41	43	54	50	57	58	56	49	41	37	47
Tariff unknown	18	20	31	38	40	45	44	57	44	48	*	29	37
Not graded	29	31	32	29	40	37	44	43	43	35	26	26	35
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	19	31	40	46	45	44	44	45	48	34	54	33	40
3 stars	25	38	41	41	53	51	56	59	51	47	40	33	45
4 stars	27	32	37	38	51	46	51	62	53	44	33	32	42
5 stars	33	42	45	50	52	58	67	67	62	56	47	44	53
Grade unknown	18	20	31	38	43	44	41	57	44	48	*	29	37
City/large town	35	41	46	48	52	52	58	61	56	50	48	44	49
Countryside/village	23	30	35	40	49	45	49	55	49	44	35	32	41
Seaside	27	38	41	39	55	51	57	61	56	50	40	34	47
Small town	21	30	36	34	45	40	46	40	44	32	25	22	35
Location unknown	18	20	31	38	40	46	46	57	44	48	*	29	37

* Sample size too small to undertake an analysis
 - No returns received

Appendix 1c - Hotels: Room Occupancy 2008 (%)

	2008 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	39	50	54	56	66	66	67	71	69	61	54	45	58
North Wales	31	41	51	54	64	65	65	73	70	64	55	48	57
Mid Wales	33	42	46	45	58	56	66	64	61	48	44	33	50
South Wales	47	59	59	62	69	69	70	71	70	61	56	48	62
South East Wales	53	62	61	66	70	72	72	72	74	65	63	52	66
South West Wales	38	51	54	56	64	64	65	69	65	54	44	40	56
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	25	31	31	36	45	45	58	54	49	39	31	29	40
11-25 rooms	37	40	46	48	62	58	58	71	66	54	49	41	53
26-50 rooms	43	55	58	61	70	69	72	75	72	64	55	47	62
51-100 rooms	40	65	65	63	73	74	73	72	74	69	62	52	66
Over 100 rooms	45	57	64	71	73	79	78	77	77	70	68	55	67
Under £20	*	*	*	*	*	*	*	*	*	*	*	*	*
£20-£29.99	*	19	20	18	32	32	39	34	34	20	6	*	25
£30-£39.99	28	31	47	47	59	56	52	58	50	44	42	31	45
£40-£49.99	28	44	45	55	62	56	64	66	61	55	41	32	51
£50-£59.99	42	56	59	54	64	66	68	70	70	60	59	47	59
£60 & over	46	58	58	61	71	71	74	74	74	65	59	49	64
Tariff unknown	24	29	48	59	58	64	57	75	71	65	*	54	53
Not graded	46	49	47	43	55	57	62	66	57	49	37	37	51
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	41	58	61	58	67	63	66	71	69	54	70	45	61
3 stars	40	53	56	59	69	69	73	72	72	64	57	46	61
4 stars	42	50	52	56	66	65	65	70	68	57	47	42	57
5 stars	35	50	56	60	69	69	73	77	71	67	59	54	62
Grade unknown	27	28	46	58	58	64	57	75	71	65	*	54	54
City/large town	54	66	68	75	73	78	78	76	80	71	72	58	71
Countryside/village	35	42	47	52	61	60	63	65	62	56	48	41	53
Seaside	38	51	53	51	69	67	70	73	72	64	54	45	60
Small town	43	49	53	54	63	61	64	66	58	47	38	33	53
Location unknown	24	29	48	59	58	65	60	75	71	65	*	54	53

* Sample size too small to undertake an analysis

- No returns received

Appendix 1d - Hotels: Bed Occupancy by Unitary Authority 2008 (%)

	2008 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Anglesey	*	*	*	*	*	*	*	*	*	*	*	*	*
Bridgend	23	31	28	29	42	35	38	41	36	30	26	29	33
Caerphilly	*	*	*	*	*	*	*	*	*	*	*	*	*
Cardiff	37	42	53	56	58	57	66	68	59	54	55	48	54
Carmarthenshire	*	*	*	*	*	*	*	*	*	*	*	*	*
Ceredigion	26	36	38	42	55	49	*	68	61	50	35	*	46
Conwy	22	30	37	38	52	49	52	61	55	49	43	40	45
Denbighshire	26	32	32	32	39	34	38	42	38	32	29	27	33
Flintshire	*	*	*	*	*	*	*	*	*	*	*	*	*
Gwynedd	18	31	39	39	50	53	56	75	66	57	44	31	47
Merthyr Tydfil	-	-	-	-	-	-	-	-	-	-	-	-	-
Monmouthshire	23	*	34	33	44	46	*	*	*	*	*	*	*
Neath & Port Talbot	*	-	-	-	-	-	-	-	-	-	-	-	*
Newport	*	*	*	*	*	*	*	*	*	*	*	*	*
Pembrokeshire	20	31	36	36	50	46	49	58	47	36	28	26	39
Powys	23	27	32	35	42	37	41	43	40	32	32	25	34
Rhondda Cynon Taff	*	*	*	*	*	*	*	*	*	*	*	*	*
Swansea	35	37	44	45	50	50	58	58	60	*	*	*	48
Torfaen	*	*	*	*	-	*	-	*	*	-	*	*	*
Vale of Glamorgan	-	-	-	-	-	*	*	*	*	*	*	*	*
Wrexham	*	*	*	*	*	*	*	*	*	*	*	*	*

* Sample size too small to undertake an analysis
 - No returns received

Appendix 1d - Hotels: Room Occupancy by Unitary Authority 2008 (%)

	2008 Monthly room occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Anglesey	-	*	*	*	*	*	*	*	*	*	*	*	*
Bridgend	41	52	44	44	66	55	61	60	56	47	43	45	52
Caerphilly	*	*	*	*	*	*	*	*	*	*	*	*	*
Cardiff	56	64	71	77	73	77	78	80	82	73	74	61	72
Carmarthenshire	*	*	*	*	*	*	*	*	*	*	*	*	*
Ceredigion	34	46	48	53	68	63	*	76	73	60	45	*	56
Conwy	29	37	48	50	65	64	65	71	70	61	56	51	56
Denbighshire	45	53	51	48	56	51	58	56	57	49	47	46	51
Flintshire	*	*	*	*	*	*	*	*	*	*	*	*	*
Gwynedd	21	39	50	51	65	68	65	85	79	67	53	36	57
Merthyr Tydfil	-	-	-	-	-	-	-	-	-	-	-	-	-
Monmouthshire	53	*	59	67	72	74	*	*	*	*	*	*	*
Neath & Port Talbot	*	-	-	-	-	-	-	-	-	-	-	-	*
Newport	*	*	*	*	*	*	*	*	*	*	*	*	*
Pembrokeshire	35	45	49	51	62	63	62	66	64	51	42	36	53
Powys	33	39	45	44	53	50	58	52	54	42	45	32	46
Rhondda Cynon Taff	*	*	*	*	*	*	*	*	*	*	*	*	*
Swansea	53	74	71	78	80	75	79	81	74	*	*	*	72
Torfaen	*	*	*	*	-	*	-	*	*	-	*	*	*
Vale of Glamorgan	-	-	-	-	-	*	*	*	*	*	*	*	*
Wrexham	*	*	*	*	*	*	*	*	*	*	*	*	*

* 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									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
January	10	11	10	15	13	14	17	12	12	11
February	13	18	15	19	20	21	21	20	20	18
March	19	19	9	27	23	21	27	20	21	24
April	28	31	20	25	37	36	30	35	33	25
May	36	34	29	36	43	41	39	41	40	38
June	38	40	32	48	41	47	47	46	43	36
July	50	48	44	51	50	54	53	56	47	45
August	61	61	54	62	63	64	64	62	57	52
September	38	37	34	43	42	46	48	45	43	38
October	28	26	25	32	30	34	33	32	31	30
November	18	13	16	22	21	20	17	19	20	17
December	15	13	12	17	17	18	14	19	15	15
Annual Average	31	30	26	34	34	35	35	34	33	29

Appendix 2b – Guest houses/bed and breakfasts: Bed Occupancy 2008 (%)

	2008 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	11	18	24	25	38	36	45	52	38	30	17	15	29
North Wales	9	16	23	25	39	36	43	53	39	30	17	16	28
Mid Wales	7	13	18	18	34	30	39	44	31	25	12	11	24
South Wales	16	25	29	30	41	40	49	56	42	32	22	17	34
South East Wales	20	30	29	37	41	32	39	44	35	29	25	20	31
South West Wales	13	22	29	26	41	44	54	63	45	34	20	15	35
1-3 rooms	10	17	20	21	34	32	36	45	32	25	14	12	25
4-10 rooms	12	19	26	28	42	40	51	58	43	33	19	17	32
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	*	*	*	*	*	*	-	-	-	*
£20-£29.99	12	21	22	26	32	29	37	45	31	23	14	12	25
£30-£39.99	11	18	24	24	40	40	47	54	39	29	17	13	31
£40-£49.99	15	21	44	35	51	48	68	69	57	42	26	28	42
£50-£59.99	-	-	*	*	*	*	*	*	*	*	-	*	*
£60 & over	*	*	*	*	*	*	*	*	*	*	*	*	*
Tariff unknown	9	15	22	23	37	36	43	55	39	29	16	14	26
Not graded	*	21	18	24	31	24	33	41	28	21	17	18	26
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	18	34	38	36	31	35	41	50	33	32	20	18	31
3 stars	10	18	22	23	35	32	41	47	33	27	18	16	27
4 stars	11	17	23	25	47	46	54	60	44	34	18	13	34
5 stars	*	13	22	37	38	43	46	55	48	39	17	*	31
Grade unknown	8	14	21	23	37	36	44	57	40	30	16	14	26
City/large town	38	53	54	58	52	42	64	69	65	50	41	41	52
Countryside/village	9	17	22	21	37	34	41	48	34	27	15	12	27
Seaside	17	24	26	32	44	49	56	66	49	37	17	16	37
Small town	14	16	24	31	38	36	44	49	34	24	20	18	28
Location unknown	9	15	22	23	37	36	43	55	39	29	16	14	26

* Sample size too small to undertake an analysis
 - No returns received

Appendix 2c – Guest houses/bed and breakfasts: Room Occupancy 2008 (%)

	2008 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	18	26	30	34	46	45	54	59	47	38	25	21	37
North Wales	14	22	28	32	46	44	51	60	48	38	24	21	35
Mid Wales	13	18	21	22	37	36	47	50	37	32	17	14	29
South Wales	27	35	37	42	50	51	59	63	52	41	30	24	43
South East Wales	33	43	41	51	52	46	52	54	47	42	34	28	43
South West Wales	21	29	35	35	49	54	64	70	55	41	26	19	43
1-3 rooms	15	23	26	28	40	39	45	51	39	31	19	16	31
4-10 rooms	19	26	32	37	50	49	61	65	53	42	28	23	40
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
51-100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Over 100 rooms	-	-	-	-	-	-	-	-	-	-	-	-	-
Under £20	-	-	-	*	*	*	*	*	*	-	-	-	*
£20-£29.99	23	28	29	34	40	38	44	47	41	32	20	16	32
£30-£39.99	15	24	29	32	46	48	56	62	47	36	24	18	38
£40-£49.99	27	34	50	46	57	57	70	70	63	50	33	32	49
£50-£59.99	-	-	*	*	*	*	*	*	*	*	-	*	*
£60 & over	*	*	*	*	*	*	*	*	*	*	*	*	*
Tariff unknown	12	21	28	29	44	43	50	62	47	37	22	19	33
Not graded	*	29	26	34	39	33	43	49	36	29	23	23	34
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	31	46	46	48	44	47	56	61	43	41	28	27	43
3 stars	19	25	29	35	42	41	50	53	44	35	27	22	35
4 stars	18	26	31	32	53	53	61	66	52	41	25	17	40
5 stars	-	25	31	38	52	56	59	58	63	54	24	*	41
Grade unknown	11	19	26	28	44	43	51	63	47	36	22	19	32
City/large town	42	62	55	67	57	54	66	71	69	57	46	42	57
Countryside/village	13	22	26	29	44	42	50	54	41	34	21	16	33
Seaside	26	32	33	38	50	60	66	72	58	45	22	19	44
Small town	29	26	33	44	45	47	51	52	44	34	30	26	38
Location unknown	12	21	28	29	44	43	50	62	47	37	22	19	33

* Sample size too small to undertake an analysis
 - No returns received

Appendix 2d – Guest houses/bed and breakfasts: Bed Occupancy by Unitary Authority 2008 (%)

	2008 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Anglesey	*	*	24	*	*	*	*	68	43	*	*	*	*
Bridgend	*	30	35	50	43	31	26	38	25	17	17	22	31
Caerphilly	*	*	*	*	*	*	*	*	*	*	*	*	*
Cardiff	*	*	*	*	*	*	*	*	*	*	*	*	*
Carmarthenshire	11	20	24	19	26	33	36	43	30	26	*	*	25
Ceredigion	*	14	12	16	29	26	39	46	37	26	*	*	22
Conwy	15	24	35	31	47	48	54	63	49	43	29	27	39
Denbighshire	8	10	18	22	34	29	34	38	32	20	10	10	21
Flintshire	15	20	20	29	32	28	34	41	31	28	24	26	27
Gwynedd	7	15	22	23	37	36	47	58	39	31	15	13	27
Merthyr Tydfil	*	*	*	*	*	*	*	*	*	*	*	*	*
Monmouthshire	13	22	*	26	37	31	35	35	21	*	*	*	22
Neath & Port Talbot	*	*	*	*	*	*	*	*	*	*	*	*	*
Newport	*	*	*	*	*	*	*	*	*	*	*	*	*
Pembrokeshire	7	13	20	22	38	43	53	66	42	28	14	9	33
Powys	7	13	18	17	35	29	36	42	27	23	12	12	23
Rhondda Cynon Taff	*	*	*	*	*	*	*	*	*	*	*	*	*
Swansea	18	33	42	34	54	56	69	73	58	45	23	*	43
Torfaen	*	*	*	*	*	*	*	*	*	*	*	*	*
Vale of Glamorgan	*	*	*	*	*	*	*	*	*	*	*	*	*
Wrexham	*	*	*	*	*	*	*	*	*	*	*	*	*

* Sample size too small to undertake an analysis
 - No returns received

Appendix 2e – Guest houses/bed and breakfasts: Room Occupancy by Unitary Authority 2008 (%)

	2008 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Anglesey	*	*	27	*	*	*	*	73	52	*	*	*	*
Bridgend	*	48	48	62	55	51	48	51	41	36	31	31	46
Caerphilly	*	*	*	*	*	*	*	*	*	*	*	*	*
Cardiff	*	*	*	*	*	*	*	*	*	*	*	*	*
Carmarthenshire	27	25	35	29	45	51	57	50	37	34	*	*	37
Ceredigion	*	16	13	18	34	30	45	48	38	30	*	*	26
Conwy	18	33	42	36	55	55	63	69	58	56	45	31	47
Denbighshire	12	13	24	28	42	36	41	45	39	24	15	13	27
Flintshire	26	35	27	43	41	39	46	49	44	38	35	33	37
Gwynedd	11	21	27	29	44	47	55	67	51	39	22	18	35
Merthyr Tydfil	-	-	-	-	-	-	-	-	-	-	-	-	-
Monmouthshire	20	28	*	31	49	41	44	41	30	*	*	*	29
Neath & Port Talbot	*	*	*	*	*	*	*	*	*	*	*	*	*
Newport	-	-	-	-	-	-	-	-	-	-	-	-	-
Pembrokeshire	10	17	26	31	45	52	64	74	56	35	20	11	39
Powys	11	18	21	21	38	35	43	46	34	31	18	17	29
Rhondda Cynon Taff	*	*	*	*	*	*	*	*	*	*	*	*	*
Swansea	31	49	50	40	62	65	75	77	61	50	28	*	51
Torfaen	-	-	-	-	-	-	-	-	-	-	-	-	-
Vale of Glamorgan	-	-	-	-	-	-	-	-	-	-	-	-	-
Wrexham	*	*	*	*	*	*	*	*	*	*	*	*	*

* Sample size too small to undertake an analysis
 - No returns received

Appendix 3: All Serviced Accommodation

Appendix 3a – All serviced accommodation: Bed Occupancy by Unitary Authority 2008 (%)

	2008 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Anglesey	*	28	35	*	55	54	58	63	44	39	23	23	40
Bridgend	26	31	30	34	42	34	34	40	33	27	23	26	32
Caerphilly	*	*	*	*	*	*	*	*	*	*	*	*	*
Cardiff	38	43	55	56	58	56	67	69	61	55	54	47	55
Carmarthenshire	14	24	26	31	30	38	42	41	38	34	23	24	30
Ceredigion	17	29	30	33	44	39	55	60	52	40	28	21	37
Conwy	20	29	36	36	51	49	52	62	54	48	40	37	43
Denbighshire	18	20	26	27	37	32	37	41	36	27	22	21	28
Flintshire	16	23	32	44	45	50	48	51	41	45	35	26	38
Gwynedd	14	24	33	33	46	48	54	70	57	50	34	25	41
Merthyr Tydfil	-	-	-	-	-	-	-	-	-	-	-	-	-
Monmouthshire	18	23	24	29	41	38	38	39	30	29	21	10	28
Neath & Port Talbot	*	*	*	*	*	*	*	*	*	*	*	*	*
Newport	*	*	*	*	*	*	*	*	*	*	*	*	*
Pembrokeshire	17	25	31	31	46	45	51	60	45	33	24	21	37
Powys	17	21	26	26	39	33	39	42	34	29	21	19	29
Rhondda Cynon Taff	*	*	*	*	*	*	*	*	*	*	*	*	*
Swansea	27	36	43	42	51	51	62	62	60	50	28	30	46
Torfaen	*	-	*	*	*	*	*	*	*	*	*	*	*
Vale of Glamorgan	-	-	-	-	-	*	*	*	*	*	*	*	*
Wrexham	25	*	32	36	45	41	49	49	46	48	35	*	39

* Sample size too small to undertake an analysis
 - No returns received

Appendix 3b – All serviced accommodation: Room Occupancy by Unitary Authority 2008 (%)

	2008 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Anglesey	*	35	43	*	66	70	69	81	64	58	37	34	53
Bridgend	42	51	45	52	62	54	56	57	51	42	38	38	49
Caerphilly	*	*	*	*	*	*	*	*	*	*	*	*	*
Cardiff	55	65	71	77	72	76	78	80	82	72	72	59	72
Carmarthenshire	32	38	47	53	54	54	58	61	53	50	40	39	48
Ceredigion	26	35	37	40	53	48	62	65	60	48	34	26	45
Conwy	26	36	47	47	62	62	65	71	67	60	54	46	54
Denbighshire	31	32	39	40	50	44	51	52	50	38	34	34	41
Flintshire	27	34	42	63	58	63	66	61	54	56	48	40	52
Gwynedd	18	32	44	44	59	61	63	80	71	61	43	31	50
Merthyr Tydfil	-	-	-	-	-	-	-	-	-	-	-	-	-
Monmouthshire	42	48	47	55	64	63	51	51	42	41	30	15	47
Neath & Port Talbot	*	*	*	*	*	*	*	*	*	*	*	*	*
Newport	*	*	*	*	*	*	*	*	*	*	*	*	*
Pembrokeshire	29	35	42	45	56	60	63	68	61	46	35	29	48
Powys	26	30	36	36	47	43	51	49	45	38	31	25	39
Rhondda Cynon Taff	*	*	*	*	*	*	*	*	*	*	*	*	*
Swansea	45	65	64	64	72	71	78	80	69	57	38	36	64
Torfaen	*	-	*	*	*	*	*	*	*	*	*	*	*
Vale of Glamorgan	-	-	-	-	-	*	*	*	*	*	*	*	*
Wrexham	42	*	48	56	60	60	68	65	64	71	53	*	57

* Sample size too small to undertake an analysis
 - No returns received

Appendix 4: Self Catering Accommodation

Appendix 4a – Self Catering Cottages and Apartments Averages (%)

	<=£299.99				£300 - £499.99			
	Agent		Independent		Agent		Independent	
	Unit Occ (%)	Sample	Unit Occ (%)	Sample	Unit Occ (%)	Sample	Unit Occ (%)	Sample
January	23.1	1019	26.3	267	0.0	0	18.8	69
February	35.0	919	40.4	231	0.0	0	40.2	72
March	34.2	1021	42.9	481	0.0	0	45.7	52
April	47.3	985	42.0	232	100.0	1	64.2	37
May	49.2	926	57.4	248	0.0	0	72.1	48
June	40.6	647	67.1	240	0.0	0	75.3	98
July	57.1	926	72.9	152	0.0	0	77.3	54
August	76.5	925	78.7	125	0.0	0	83.2	69
September	19.7	230	68.8	112	0.0	0	74.5	97
October	0.0	0	48.1	124	0.0	0	62.3	82
November	30.4	135	23.1	122	0.0	0	30.8	75
December	29.0	357	36.1	85	0.0	0	44.2	42
<i>May-Oct Average</i>	<i>40.5</i>	<i>609</i>	<i>65.5</i>	<i>167</i>	<i>0.0</i>	<i>0</i>	<i>74.1</i>	<i>75</i>
<i>Apr-Oct Average</i>	<i>41.5</i>	<i>663</i>	<i>62.1</i>	<i>176</i>	<i>14.3</i>	<i>0</i>	<i>72.7</i>	<i>69</i>
<i>Jan-Dec Average</i>	<i>36.8</i>	<i>674</i>	<i>50.3</i>	<i>202</i>	<i>8.3</i>	<i>0</i>	<i>57.4</i>	<i>66</i>

£500 - £799.99				£800 +			
Agent		Independent		Agent		Independent	
Unit Occ (%)	Sample	Unit Occ (%)	Sample	Unit Occ (%)	Sample	Unit Occ (%)	Sample
0.0	0	25.4	35	0.0	0	2.9	12
0.0	0	39.1	30	0.0	0	60.9	5
0.0	0	52.3	23	0.0	0	42.8	12
0.0	0	53.3	30	0.0	0	0.0	0
0.0	0	76.4	41	0.0	0	64.0	15
0.0	0	69.0	83	0.0	0	68.3	16
0.0	0	80.1	100	0.0	0	76.5	60
0.0	0	93.7	114	0.0	0	93.1	62
0.0	0	77.4	52	0.0	0	72.7	16
0.0	0	57.2	45	0.0	0	51.1	13
0.0	0	18.5	19	0.0	0	16.4	5
0.0	0	46.2	58	0.0	0	46.9	35
0.0	0	75.6	73	0.0	0	71.0	30
0.0	0	72.4	66	0.0	0	60.8	26
0.0	0	57.4	53	0.0	0	49.6	21

Appendix 4b – Hostels – maximum and minimum occupancy levels per region (%)

	North			Mid		
	Max Bed Occ (%)	Min Bed Occ(%)	Sample	Max Bed Occ (%)	Min Bed Occ(%)	Sample
January	14.8	7.5	4	31.1	10.6	4
February	45.4	0.0	12	42.8	21.6	5
March	56.5	0.0	11	50.8	7.5	6
April	79.9	0.0	11	58.3	35.0	6
May	67.3	0.0	11	76.4	49.3	6
June	91.9	0.0	12	67.1	21.2	6
July	77.2	2.3	12	70.0	33.1	6
August	94.4	2.1	12	84.6	37.4	6
September	67.1	0.0	12	53.8	27.8	6
October	58.6	0.1	11	73.6	17.8	6
November	64.7	0.0	11	47.1	0.0	6
December	17.2	0.0	10	49.5	0.0	6
<i>May-Oct Average</i>	<i>76.1</i>	<i>0.8</i>	<i>12</i>	<i>70.9</i>	<i>31.1</i>	<i>6</i>
<i>Apr-Oct Average</i>	<i>76.6</i>	<i>0.6</i>	<i>12</i>	<i>69.1</i>	<i>31.6</i>	<i>6</i>
<i>Jan-Dec Average</i>	<i>61.2</i>	<i>1.0</i>	<i>11</i>	<i>58.8</i>	<i>21.8</i>	<i>6</i>

	South East			South West		
	Max Bed Occ (%)	Min Bed Occ(%)	Sample	Max Bed Occ (%)	Min Bed Occ(%)	Sample
January	35.9	35.9	1	0.5	0.4	2
February	48.0	48.0	1	26.8	0.8	3
March	45.8	45.8	1	49.9	4.3	7
April	47.2	47.2	1	56.7	0.0	9
May	55.0	55.0	1	87.5	39.2	8
June	44.1	44.1	1	75.8	21.9	8
July	58.0	58.0	1	94.5	42.4	9
August	87.1	55.3	2	96.8	47.3	9
September	61.1	55.6	2	47.4	7.5	9
October	49.7	49.7	1	61.3	0.0	9
November	36.5	21.1	2	11.4	0.0	9
December	35.4	17.2	2	12.4	0.0	9
<i>May-Oct Average</i>	<i>59.2</i>	<i>53.0</i>	<i>1</i>	<i>77.2</i>	<i>26.4</i>	<i>9</i>
<i>Apr-Oct Average</i>	<i>57.5</i>	<i>52.1</i>	<i>1</i>	<i>74.3</i>	<i>22.6</i>	<i>9</i>
<i>Jan-Dec Average</i>	<i>50.3</i>	<i>44.4</i>	<i>1</i>	<i>51.7</i>	<i>13.6</i>	<i>8</i>

Appendix 5: Monthly Forms

Month: **OCTOBER 2008**
 Mis: **HYDREF 2008**

Establishment Code: **WH-**
 Cód Sefydlu:

ESTABLISHMENT INFORMATION (Please update if necessary)
GWYBODAETH AM Y SEFYDLIAD (Diweddarer os oes angen)

No of Rooms: No of Bedspaces:
 Nifer Ystafelloedd: Nifer gwelyau:

If closed all month, please tick:
 Ticiwch yma os ar gau drwy'r mis:

Max charge this month for one person sharing double/twin room for B&B (inc VAT):
 Uchafswm tâl y mis hwn am un person yn rhannu ystafell ddwbl/gefaill ar gyfer G&B (cynnwys TAW): £

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.

Extra beds and rooms are any used in excess of your normal capacity.

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.

NODIADAU AR LENWI'R FFURFLEN

Gofynnir i chi ddiweddarau'r wybodaeth amgaeedig ar gyfer y mis hwn os oes angen.

Pan yn rhoi ffigurau dyddiol, nid oes angen i chi gyfrif y cyfansymiau ar gyfer y mis os na ddymunwch wneud hynny.

Os nad yw'r wybodaeth ddyddiol ar gael, gofynnir i chi roi'r cyfansymiau misol yn y rhres isaf.

Os na fedrwch roi ffigurau ar wahân ar gyfer gwsteion y DU a Thramor, dylid gadael y colofnau hyn yn wag a llenwi'r colofnau 'Cyfansymiau'.

Gwelyau ac ystafelloedd ychwanegol yw unrhyw rai a ddefnyddir yn fwy na'ch darpariaeth arferol.

Ni ddylid cyfrif plant mewn cotiau yn eich ffigurau.

Noder yn glir unrhyw ddyddiau pan oeddech wedi cau am fusnes.

Date Dyddiad	Number of guests staying overnight Cyfanswm nifer gwsteion yn aros dros nos			Number of bedrooms occupied Nifer yr ystafelloedd gwely a ddefnyddiwyd	Total capacity (to be completed only if capacity differs from normal) Cyfanswm (i'w lenwi os yn wahanol nag arfer)		Number of business (ie non-leisure) guests Nifer gwsteion busnes (h.y. nid hamdden)
	UK Prydeinig	Overseas Tramor	Total Cyfanswm		Rooms Ystafelloedd	Bedspaces Gwelyau	
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Totals Cyfansymiau							

PLEASE RETURN THE COMPLETED FORM BY **12 NOVEMBER 2008**
 AR ÔL EI LLENWI GOFYNNIR I CHI DDYCHWELYD Y FFURFLEN ERBYN 12 TACHWEDD 2008

TNS Travel & Tourism, 19 Atholl Crescent, Edinburgh EH3 8HQ TEL: 029 2039 4833 FAX: 029 2039 5833

OFFICE USE	169452 SER OccFm
I/P:	Ver:

SELF-CATERING ACCOMMODATION OCCUPANCY SURVEY
AROLWG DEFNYDDLLETTY HUNAN-DDARPAR



AUGUST 2008 AWST 2008

Establishment Code

WSC99999

Côd Sefydlu

Individual Unit Reference
Cyfeiriad Uned Unigrwy

Max weekly rental this month
Uchafswm Rhent Wythnos y Mis yma

Property 1

£

Property 2

£

Property 3

£

		Off-Hire <i>Dim ar qael</i>	Booked <i>Wed'i fwcio</i>	Available <i>Ar qael</i>				Off-Hire <i>Dim ar qael</i>	Booked <i>Wed'i fwcio</i>	Available <i>Ar qael</i>				Off-Hire <i>Dim ar qael</i>	Booked <i>Wed'i fwcio</i>	Available <i>Ar qael</i>
Sat 2 Aug 2008	<i>Sad 2 Aws 2008</i>															
Sun 3 Aug 2008	<i>Sul 3 Aws 2008</i>															
Mon 4 Aug 2008	<i>Llun 4 Aws 2008</i>															
Tue 5 Aug 2008	<i>Maw 5 Aws 2008</i>															
Wed 6 Aug 2008	<i>Mer 6 Aws 2008</i>															
Thu 7 Aug 2008	<i>Iau 7 Aws 2008</i>															
Fri 8 Aug 2008	<i>Gwe 8 Aws 2008</i>															
Sat 9 Aug 2008	<i>Sad 9 Aws 2008</i>															
Sun 10 Aug 2008	<i>Sul 10 Aws 2008</i>															
Mon 11 Aug 2008	<i>Llun 11 Aws 2008</i>															
Tue 12 Aug 2008	<i>Maw 12 Aws 2008</i>															
Wed 13 Aug 2008	<i>Mer 13 Aws 2008</i>															
Thu 14 Aug 2008	<i>Iau 14 Aws 2008</i>															
Fri 15 Aug 2008	<i>Gwe 15 Aws 2008</i>															
Sat 16 Aug 2008	<i>Sad 16 Aws 2008</i>															
Sun 17 Aug 2008	<i>Sul 17 Aws 2008</i>															
Mon 18 Aug 2008	<i>Llun 18 Aws 2008</i>															
Tue 19 Aug 2008	<i>Maw 19 Aws 2008</i>															
Wed 20 Aug 2008	<i>Mer 20 Aws 2008</i>															
Thu 21 Aug 2008	<i>Iau 21 Aws 2008</i>															
Fri 22 Aug 2008	<i>Gwe 22 Aws 2008</i>															
Sat 23 Aug 2008	<i>Sad 23 Aws 2008</i>															
Sun 24 Aug 2008	<i>Sul 24 Aws 2008</i>															
Mon 25 Aug 2008	<i>Llun 25 Aws 2008</i>															
Tue 26 Aug 2008	<i>Maw 26 Aws 2008</i>															
Wed 27 Aug 2008	<i>Mer 27 Aws 2008</i>															
Thu 28 Aug 2008	<i>Iau 28 Aws 2008</i>															
Fri 29 Aug 2008	<i>Gwe 29 Aws 2008</i>															
Sat 30 Aug 2008	<i>Sad 30 Aws 2008</i>															
Sun 31 Aug 2008	<i>Sul 31 Aws 2008</i>															
Mon 1 Sep 2008	<i>Llun 1 Med 2008</i>															
Tue 2 Sep 2008	<i>Maw 2 Med 2008</i>															
Wed 3 Sep 2008	<i>Mer 3 Med 2008</i>															
Thu 4 Sep 2008	<i>Iau 4 Med 2008</i>															
Fri 5 Sep 2008	<i>Gwe 5 Med 2008</i>															
Total Days <i>Cyfansym dyddiau</i>																

Reasons for any units off-hire:

Rhesymau pam nad yw unedau ar gael:

- Refurbishment/decoration
Gwellianau/adnewyddiadau
- Self booked
Hunan - fwciwyd
- Other (please specify)
Arall (nodwch)

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PLEASE RETURN THE COMPLETED FORM BY 12 SEPTEMBER 2008

AR ÔL EI LLENWI GOFYNNIR I CHI DDYCHWELYD Y FFURFLEN ERBYN 12 MEDI 2008

TNS Travel & Tourism, 19 Atholl Crescent, Edinburgh EH3 8HQ TEL: 029 2039 4833 FAX: 029 2039 5833

OFFICE USE	169452 SC OccFm
I/P:	Ver:

HOSTEL ACCOMMODATION OCCUPANCY SURVEY
AROLWG DEFNYDD HOSTELAU



Month: **DECEMBER 2008**
Mis: **RHAGFYR 2008**

Establishment Code: **WY-99999**
Còd Sefydlu:

ESTABLISHMENT INFORMATION (Please update if necessary)
GWYBODAETH AM Y SEFYDLIAD (Diweddarer os oes angen)

If closed all month, please tick:
Ticiwch yma os ar gau drwy'r mis:

No of Bedspaces:
Nifer gwelyau:

Max charge this month per person per night (excluding breakfast):
Tâl uchaf y pen y nos y mis hwn (heb gynnwys brecwast): £

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.

NODIADAU AR LENWI'R FFURFLEN

Gofynnir i chi ddiweddarau'r wybodaeth amgaeedig ar gyfer y mis hwn os oes angen.

Pan yn rhoi ffigurau dyddiol, nid oes angen i chi gyfrif y cyfansymiau ar gyfer y mis os na ddymunwch wneud hynny.

Os nad yw'r wybodaeth ddyddiol ar gael, gofynnir i chi roi'r cyfansymiau misol yn y rhres isaf.

Os na fedrwch roi ffigurau ar wahân ar gyfer gwsteion y DU a Thramor, dylid gadael y colofnau hyn yn wag a llenwi'r colofnau 'Cyfansymiau'.

Ni ddylid cyfrif plant mewn cotiau yn eich ffigurau.

Noder yn glir unrhyw ddyddiau pan oeddech wedi cau am fusnes.

Date Dyddiad	Number of guests staying overnight Cyfanswm nifer gwsteion yn aros dros nos			Total capacity (to be completed only if capacity differs from normal) Cyfanswm (i'w llenwi dim ond os yn wahanol nag arfer)
	UK Prydeinig	Overseas Tramor	Total Cyfanswm	
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Totals Cyfansymiau				

PLEASE RETURN THE COMPLETED FORM BY **12 JANUARY 2009**
AR ÔL EI LLENWI GOFYNNIR I CHI DDYCHWELYD Y FFURFLEN ERBYN 12 IONAWR 2009

TNS Travel & Tourism, 19 Atholl Crescent, Edinburgh EH3 8HQ
TEL: 029 2039 4833 FAX: 029 2039 5833

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MAY 2008 MAI 2008

Establishment Code **WP99999** Cód Sefydlu

Number of units/pitches available per night:
Nifer o unedau/safleoedd ar gael y nos:

Static caravans: Caravansau sefydlog: Chalets: Siales: Caravan pitches: Safleoedd Carafanau: Tent pitches: Safleoedd pebyll:

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 cyfanswmiau wythnosol neu fisol, os yn haws.

Date <i>Dyddiad</i>	STATIC UNITS LET UNEDAU SEFYDLOG A FWCIWYD		TOURING PITCHES LET SAFLEOEDD TEITHIOL A FWCIWYD	
	Caravans <i>Carafanau</i>	Chalets <i>Siales</i>	Caravans/ trailers <i>Carafnau</i>	Tents <i>Pebyll</i>
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Total Days Cyfansymiau				

PLEASE RETURN THE COMPLETED FORM BY **12 JUNE 2008**
AR ÔL EI LLENWI GOFYNNIR I CHI DDYCHWELYD Y FFURFLEN ERBYN 12 MEHEFIN 2008

TNS Travel & Tourism, 19 Atholl Crescent, Edinburgh EH3 8HQ TEL: 029 2039 4833 FAX: 029 2039 5833

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I/P:	Ver: