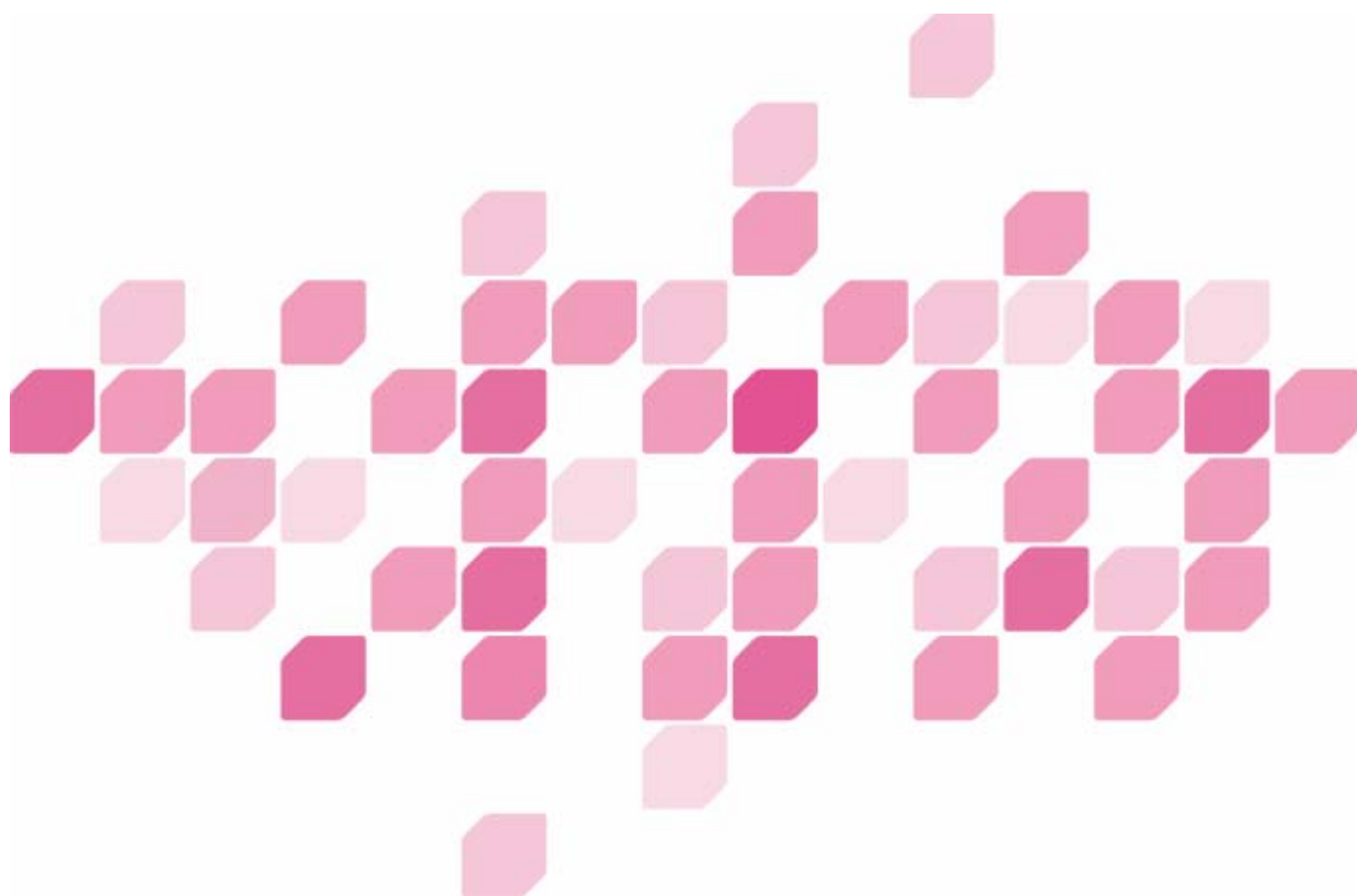


# Wales Serviced Accommodation Occupancy Survey 2007

## Final Report with Executive Summary

May 2008



# **Wales Accommodation Occupancy Survey 2007**

## **Final Report**

Visit Wales

May 2008

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## A. Executive Summary

### Introduction

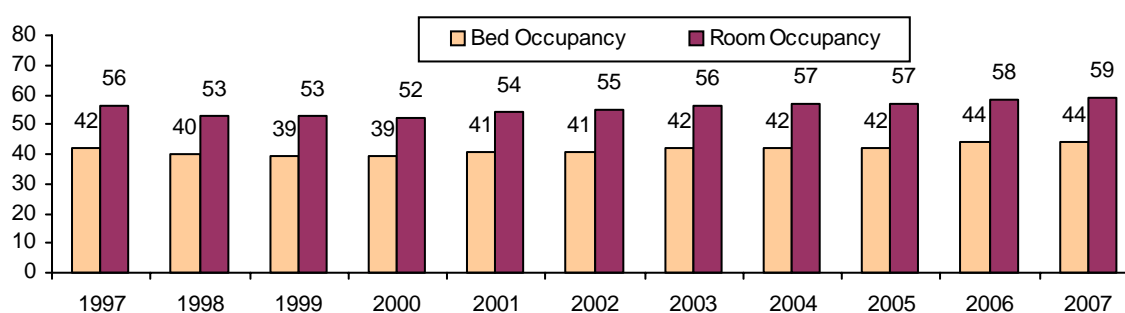
An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to include all serviced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

This report presents the 2007 occupancy figures for the two serviced accommodation sectors: hotels; and guest houses and bed and breakfast establishments. Where available, comparative figures are presented from previous years.

### Hotels

The annual average bed and room occupancy rates in 2007 were relatively consistent with those recorded in the past few years at 44% and 59% respectively. Both the average bed and room occupancy rates recorded in 2007 are as high as they have been in any year over the last years.

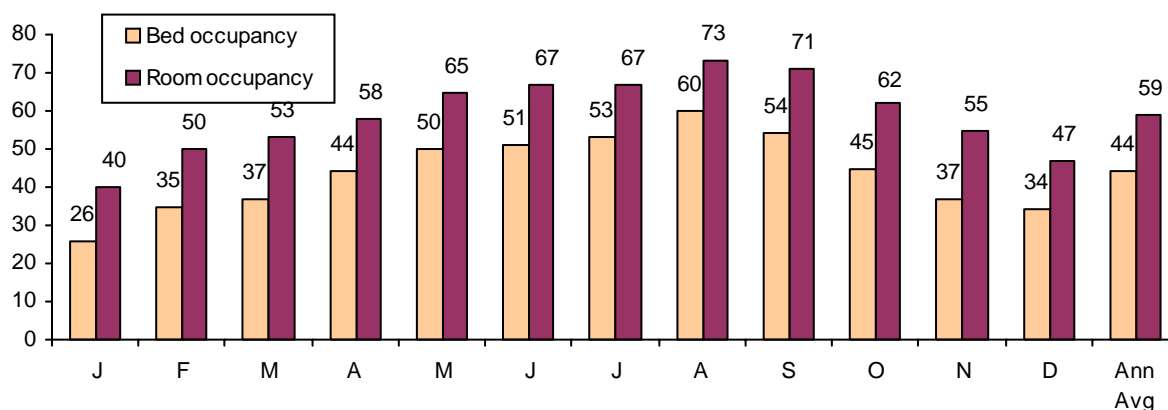
**Figure C-1- Hotels - Trends in Occupancy Rates - Annual Averages (%)**



### Monthly Bed and Room Occupancy

The occupancy rates recorded in 2007 illustrate the seasonality of the hotel sector, with the average bed occupancy rate peaking during August (60%), having risen from 26% in January before falling to 34% in December. This pattern is also evident in the average room occupancy figures which increased from 40% in January to 73% in August, before falling to 47% in December.

**Figure C-2- Hotels - Monthly Bed & Room Occupancy – 2007 (%)**

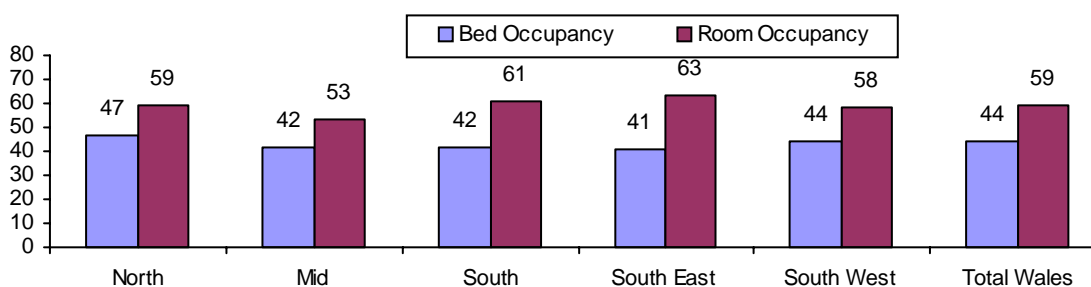


### Occupancy Rates by Regions of Wales

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

The results for the South region of Wales are also presented separately for the South East and South West regions.

**Figure C-3 - Hotels - Annual Average by Regions of Wales – 2007 (%)**



In 2007, hotels in the North of Wales recorded the highest average bed occupancy rate (47%), six percentage points higher than the rate recorded in the South East region (41%). Hotels in

Mid and South Wales recorded average bed occupancy rates of 42%, two percentage points lower than the rate recorded for the South West in 2007 (44%).

As in previous years, establishments located in the South East recorded the highest room occupancy levels (63% and 61% respectively in both 2006 and 2007). North and South West Wales also recorded relatively high average room occupancy levels of 59% and 58% respectively. Mid Wales recorded slightly lower average room occupancy levels of 53%.

#### *Percentage of Overseas Guests*

As may be expected, overseas occupancy was highest during the main tourist season (May to September), with an overseas occupancy rate of 4-6% recorded for overseas guests during these months. In 2007, the highest percentage of overseas guests was recorded in July (6%), while the lowest percentages were recorded in February and December (2% each). The annual average proportion of overseas guests was 4%, a slight decrease on the comparative rates for 2005 and 2006 (5% each).

#### *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.

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 (33%). The rate recorded fell to 10% in August, before rising again to 24% in December.

The annual average proportion of business guests was 18%, a slight decrease on the rate recorded in 2006 (20%) but higher than in 2005 (15%).

#### *Occupancy by Size of Hotel*

There was generally a positive relationship between the size of hotels and occupancy levels. Hotels with over 100 rooms recorded an average bed occupancy rate that was ten percentage points higher than the rate recorded for hotels with 3-4 rooms, while there was a twenty-two percentage point difference between the average room occupancy rates recorded by hotels in these two size bands. One exception was that hotels with 51-100 rooms recorded a slightly higher average bed occupancy rate in 2007 than the average for those in the largest size band (50% and 49% respectively).

### *Occupancy by Tariff*

Overall, a positive relationship between the tariff charged and occupancy levels for hotels was recorded in 2007. Establishments charging £60 and over recorded an annual average bed occupancy rate twenty-eight percentage points higher than the rate recorded by those charging £20-£29.99, while there was a thirty-nine percentage point difference between the annual average room occupancy rate recorded for hotels in these two tariff bands.

### *Occupancy by Location*

In line with previous findings, the highest annual bed and room occupancy levels in 2007 were recorded by establishments located in cities and large towns (48% and 71% respectively), with these establishments recording the largest differential between bed and room occupancy. This highlights the impact of business tourism in these establishments. In contrast, hotels in 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*

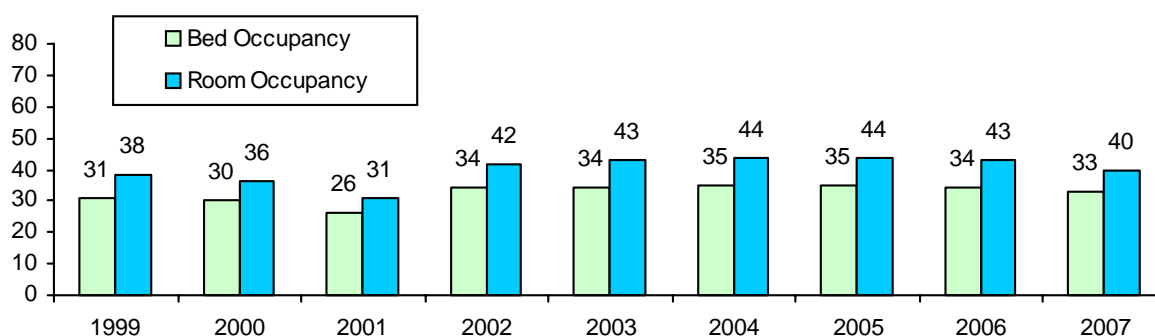
Within the Visit Wales grading scheme, there appeared to be a positive correlation between grading and occupancy levels. Establishments with a five star grading recorded the highest average bed and room occupancy rates in 2007 of 59% and 65% respectively, while hotels with a 2 star grading recorded the lowest average bed and room occupancy rates of 42% and 56% respectively.

## Guest Houses and Bed and Breakfasts

### *Annual Average Bed and Room Occupancy*

Overall, annual bed occupancy rates in 2007 were relatively consistent with previous years. Room occupancy rates however recorded a 4 percentage point fall over the last two years – down to 40%.

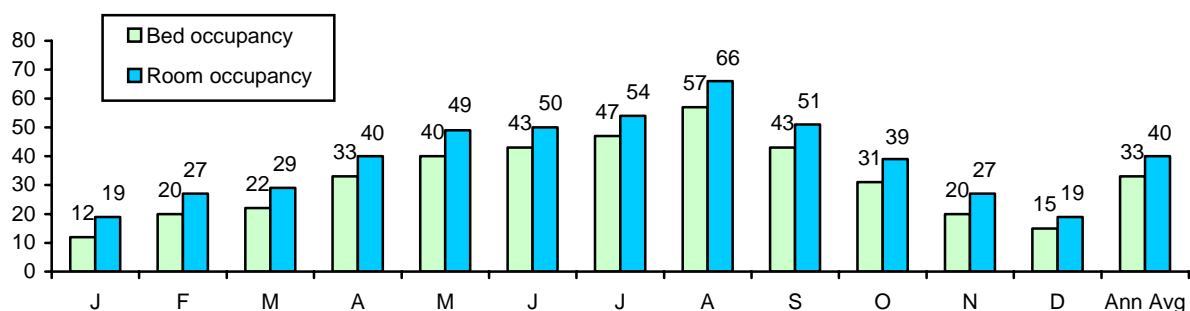
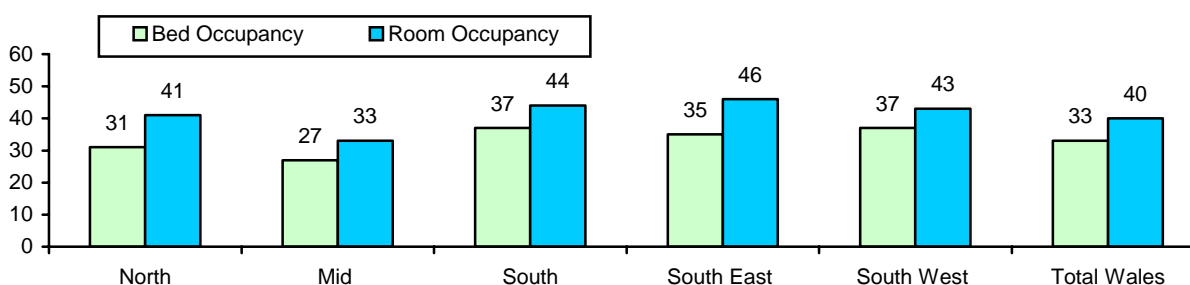
**Figure D-1- Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)**



### *Monthly Bed and Room Occupancy*

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 12% in January to 57% in August before falling to 15% in December. The annual average bed occupancy rate was 33%.



**Figure D-2- Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2007 (%)***Occupancy Rates by Regions of Wales***Figure D-3- Guest Houses/B&Bs - Annual Average by Regions of Wales – 2007 (%)**

The highest annual bed occupancy rates were recorded in the South West (37%) with annual room occupancy levels at their highest in the South East (46%). As with last year, occupancy levels in Mid Wales were noticeably lower, recording 27% for bed occupancy and 33% for room occupancy.

The greatest difference between the annual bed and room occupancy rates recorded in 2007 were 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, overseas occupancy reached a maximum during the peak summer month of July (18%) and was lowest during February when a rate of 5% was recorded. The annual average percentage of overseas guests in guest houses and bed and breakfast establishments was 12% in 2007.

*Percentage of Business Guests*

The annual average proportion of business guests in bed and breakfast and guest house establishments in 2007 was 20% - a 1 percentage point increase on 2006. The percentage of business guests was at its highest in January (61%) – a significant rise of 16 percentage points

compared to January 2006. In contrast and as in 2006, the proportion of business guests was lowest during the month of August (11%).

#### *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 between the size of establishments and occupancy rates with both the annual bed and room occupancy rates higher (9 and 14 percentage points respectively) in establishments with 4 – 10 rooms. The higher occupancy amongst larger establishments is likely to be a result of a number of factors, including the likelihood that larger establishments are more likely to be open all year, more likely to attract business visitors and are more likely to be actively involved in the marketing of the establishment.

#### *Occupancy by Tariff*

Annual room occupancy rates for establishments charging £20-29.99 have remained relatively consistent over the last five years although this year has seen a 4 percentage point fall compared to 2006. Establishments charging £30-39.99 have recorded an 8 percentage point fall compared to 2004. The sample size for establishments charging under £20 was too small to analyse.

#### *Occupancy by Location*

As 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 for cities and large towns, these results should be interpreted with some degree of caution. As in 2006, the second highest rates in 2007 were recorded by establishments located in seaside areas with annual bed and room occupancy rates of 39% and 46% respectively. Establishments in cities and large towns and country/villages areas recorded a 3-4 percentage point 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.

As in the previous two years, graded establishments had higher bed and room occupancy levels than those with no grading. The annual room occupancy rates in 2007 for non graded and 1 star establishments were similar to 2006. 2, 3 and 4 star establishments however all

recorded a decrease compared to last year (3 star establishments recording the largest decrease – 5 percentage points).

## **All Accommodation**

In 2007, both the annual bed and room occupancy rates for all types of serviced accommodation remained relatively consistent with those recorded since 2003.

Bed and room occupancy levels were both at their highest during the main summer tourist season, peaking at 59% and 71% respectively in August.

The percentage of overseas guests was very consistent with those recorded since 2005. The month of July recorded a 3 percentage point increase compared to 2006 (7% vs. 10%). Reflecting these results, the overall average in 2007 was the same as in both 2005 and 2006 (6%).

## **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.

The Wales Serviced Accommodation Occupancy Survey provides the latest and most inclusive information on the demand for serviced accommodation in Wales. The fast turnaround of the results within several weeks of the month in question means that the survey is a key indicator in monitoring the performance of the tourist industry in Wales.

This report presents the 2007 occupancy figures for the two serviced accommodation sectors: hotels; and guest houses and bed and breakfast establishments. Where available, comparative figures are presented from previous years.

Sections B and C examine each of the serviced accommodation sectors in turn. Copies of the monthly forms completed by operators are presented in Appendix 1.

### **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 after the end of the month. The occupancy form asked operators to record on a daily basis: the number of new guests checking in; the number of UK and overseas guests; the number of guests on business; the number of rooms occupied; and the number of additional bedspaces and rooms used, if any.

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.

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

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

## C. Hotels

### Sample Size

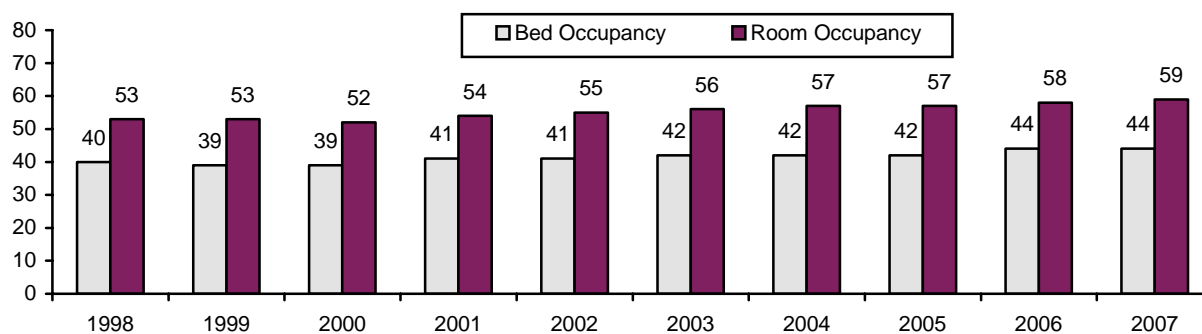
In 2007, a total of 122 hotels participated in the survey (i.e. provided at least one return during the year). To ensure that the results are comparable across the months, a great deal of effort was placed in trying to maintain the level of response each month and operators have been encouraged to provide a full response over the year. Over half (58%) of the operators who contributed to the survey provided data for every month of the year. A further 12% provided data for all but one month of the year.

During this period, two hotels were recruited to take part in the survey. However, in the same period thirteen establishments withdrew or were deleted from the survey. Establishments were deleted as they had not sent returns in a long period. 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 and become of the view that they have "*done their bit for the survey*". This is 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 2007 were 44% and 59% respectively, similar rates to those recorded in 2006 (44% and 58% respectively). The average bed occupancy rate recorded for both years is the highest recorded since 1998, with the 2007 average room occupancy rate as high as it has been in any year over the last ten years.

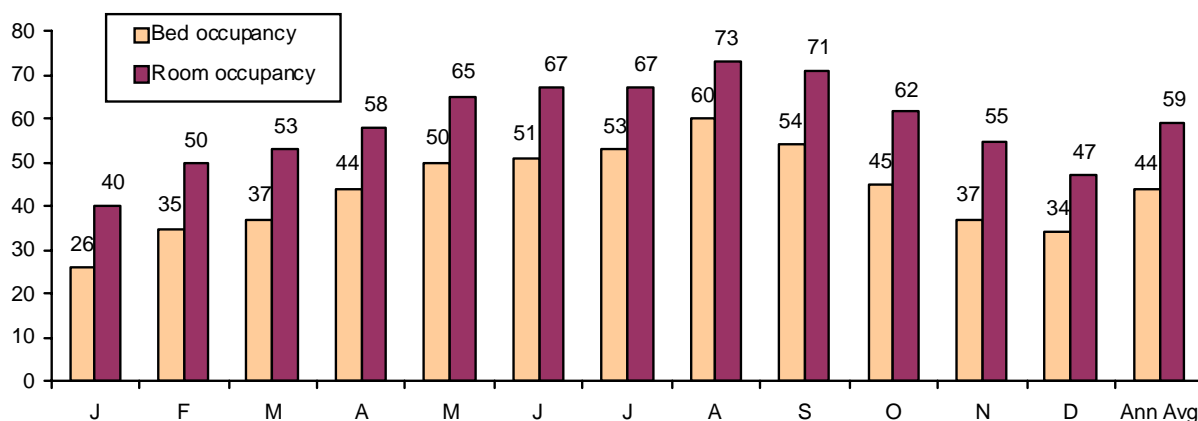
**Figure C-1- Hotels - Trends in Occupancy Rates - Annual Averages (%)**



### Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2007 are presented in Figure C-2 below.

**Figure C-2- Hotels - Monthly Bed & Room Occupancy – 2007 (%)**



The occupancy rates recorded in 2007 illustrate the seasonality of the hotel sector, with the average bed occupancy rate peaking during August (60%), having risen from 26% in January before falling to 34% in December. This variation is also evident in the average room occupancy figures which increased from 40% in January to 73% in August, before falling to 47% in December. Between months, the largest increase in both the average bed and room occupancy rates recorded occurred between July and August, where the average bed occupancy rate rose by seven percentage points and the average room occupancy figure by six percentage points between these two months. The largest decrease occurred between September and October, where the average bed and room occupancy rates recorded both fell by nine percentage points.



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

	Room occupancy									
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
January	31	31	31	33	36	37	35	40	38	40
February	42	38	42	43	47	48	49	48	50	50
March	43	45	44	44	50	50	52	52	51	53
April	53	51	52	49	52	56	54	57	58	58
May	60	58	58	61	60	62	63	63	65	65
June	64	62	61	63	63	63	65	65	66	67
July	67	67	67	66	65	66	67	67	70	67
August	68	69	68	70	67	69	68	69	73	73
September	67	67	63	64	65	67	69	69	71	71
October	54	55	55	58	58	58	58	58	61	62
November	44	47	47	53	50	50	52	50	53	55
December	37	37	41	43	42	43	45	43	44	47
<i>Annual Average</i>	53	53	52	54	55	56	57	57	58	59

For eleven months in 2007, average room occupancy rates were at the same level or slightly higher than the comparative rates for 2006. The largest increase between the two years was recorded in December, with the 2007 average room occupancy rate three percentage points higher than that recorded during the same month in the previous year (47% and 44% respectively). The December 2007 figure is also the highest recorded since 1998. July was the only month in 2007 where the average room occupancy rate recorded was lower than the figure for the same month in 2006 (67% and 70% respectively).

Trends in monthly bed occupancy rates since 1998 are presented in Appendix 2a.

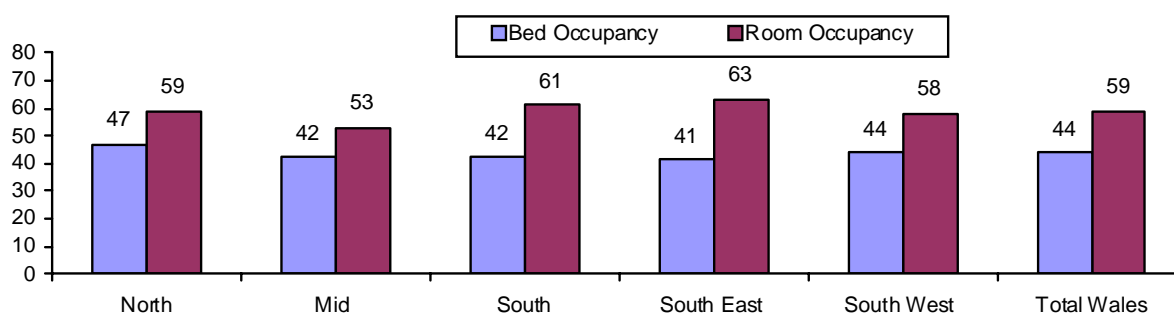
### Occupancy Rates by Regions of Wales

Figure C-3 below presents the annual average bed and room occupancy rates for each region of Wales. The definition of these regions is presented below:

<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 Tydfill, 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 Tydfill, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, Newport, Cardiff.
<i>South West Wales:</i>	Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot.

The results for the South region of Wales are also presented separately for the South East and South West regions.

**Figure C-3 - Hotels - Annual Average by Regions of Wales – 2007 (%)**



In 2007, hotels in the North of Wales recorded the highest average bed occupancy rate of 47%, which was six percentage points higher than the rate recorded in the South East region (41%). Hotels in Mid Wales recorded an average bed occupancy rate of 42%, two percentage points lower than the rate recorded for the South West in 2007 (44%).

There was also some variation in the annual room occupancy figures recorded for each region. As in previous years, establishments located in the South East recorded the highest room occupancy rates (63% respectively in both 2006 and 2007). North and South West Wales also

recorded relatively high average room occupancy levels at 59% and 58% respectively. Mid Wales recorded a slightly lower average room occupancy levels of 53%.

Average bed and room occupancy levels for each region on a monthly basis for 2007 are presented in Appendix 2b and 2c. Bed and room occupancy levels by unitary authority presented in Appendix 2d and 2e. However, due to the small sample size in some areas this information is not always available.

### Trends in Occupancy Rates by Regions of Wales

Room occupancy rates in the regions of Wales since 1998 are presented in Table C-2 below.

In 2007, the average room occupancy rates recorded in the South East regions were equal to those recorded in 2006 (63%). The average for the whole of Wales was one percentage point higher in 2007 than for 2006 due to a two percentage point increase in the average room occupancy rate recorded by establishments in the North of Wales between the two years (57% to 59%) and a 1 percentage point increase in Mid Wales (53% to 54%).

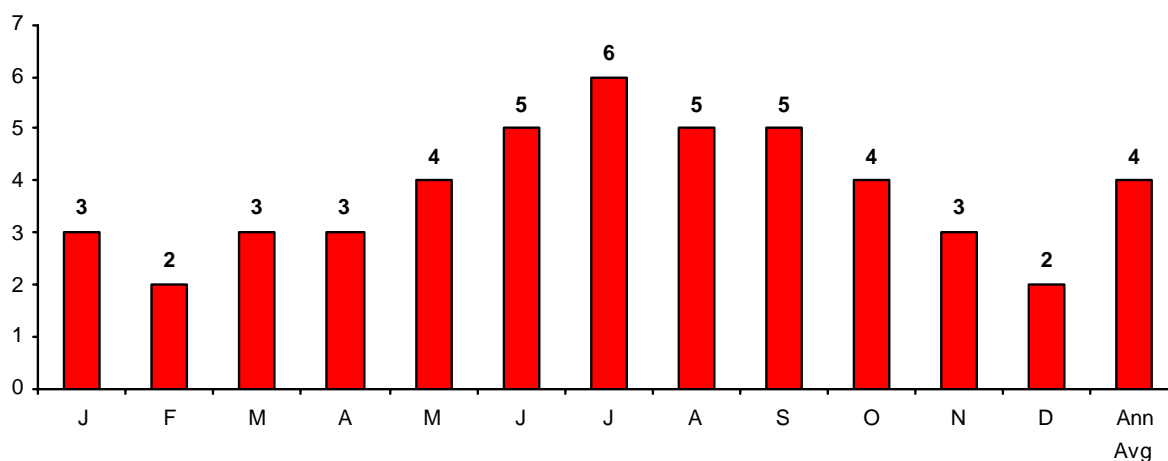
**Table C-2- Hotels - Trends in Room Occupancy Rates by Regions of Wales (%)**

	Annual Average Room Occupancy									
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Wales	53	52	53	53	52	53	54	54	57	59
Mid Wales	44	42	43	44	49	51	52	52	53	53
South Wales	56	56	55	58	58	59	60	60	61	61
South East Wales	60	59	57	61	60	62	63	60	63	63
South West Wales	43	44	48	53	56	54	55	59	58	58
TOTAL WALES	53	53	52	54	55	56	57	57	58	59

## Percentage of Overseas Guests

On the monthly occupancy form operators are asked to identify the number of guests staying in the hotel each night by nationality - UK and overseas. It should be noted that not all respondents provide this information.

**Figure C-4- Hotels - Percentage of Overseas Guests 2007 (%)**



As may be expected, overseas occupancy was highest during the main tourist season (May to September), with 4-6% recorded for overseas guests during these months. In 2007, the highest percentage of overseas guests was recorded in July (6%), while the lowest percentage was recorded in February and December (2% each). The annual average proportion of overseas guests was 4%, a slight decrease on the comparative rates for 2005 and 2006 (5% each).

### Trends in Percentage of Overseas Guests

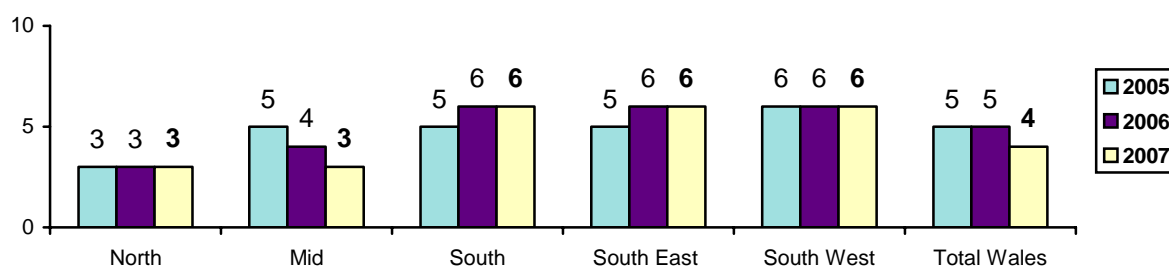
As illustrated in Table C-3 below, the percentage of overseas guests recorded in 2007 was slightly lower than the rates recorded for the previous four years (4% and 5% respectively). Overall, since 1998, the percentage of overseas guests has fallen by six percentage points (from 10% to 4%).

The percentage of overseas guests recorded in 2007 was equal to that recorded in 2006 for five months of the year. A lower rate was recorded for six months in 2007, while the percentage of overseas guests recorded was slightly higher during the month of July (6% in 2007 v 5% in 2006).

**Table C-3- Hotels - Trends in Percentage of Overseas Guests (%)**

	% of overseas guests									
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
January	6	6	5	5	5	4	3	4	3	3
February	4	4	5	4	4	3	3	3	2	2
March	7	8	6	5	5	5	5	4	5	3
April	10	7	7	10	5	5	4	3	4	3
May	12	10	10	9	8	6	6	5	6	4
June	15	13	10	10	9	7	7	6	6	5
July	18	10	11	11	9	8	6	6	5	6
August	13	12	10	8	8	6	6	5	5	5
September	13	10	9	7	7	6	6	5	5	5
October	8	9	8	6	6	4	5	4	5	4
November	9	7	4	4	5	4	3	4	3	3
December	6	4	3	3	3	2	2	3	3	2
<b>Annual Average</b>	<b>10</b>	<b>8</b>	<b>8</b>	<b>7</b>	<b>7</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>4</b>

**Figure C-5- Hotels - Percentage of Overseas Guests by Region 2005 – 2007 (%)**



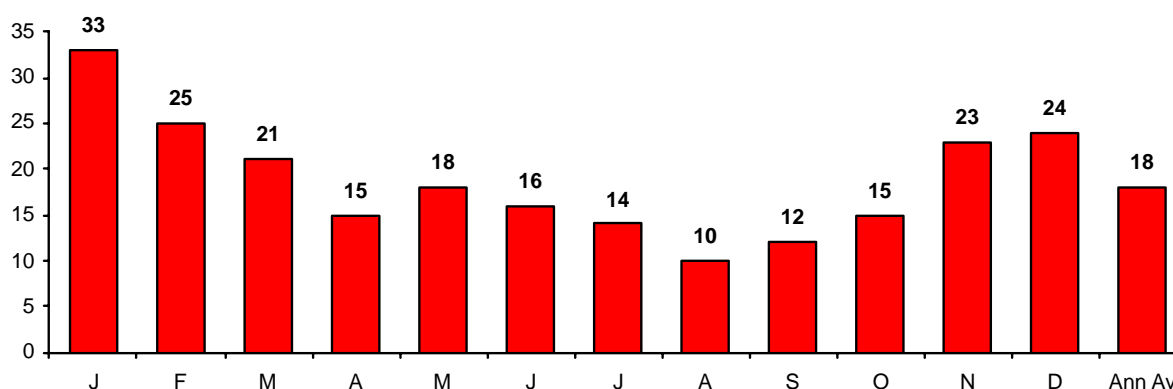
As in previous years, the percentage of overseas guests was highest in the South East, South West (6%). This rate has remained relatively consistent in these regions for the past three

years. The percentage of overseas guests has remained consistent in North Wales in recent years, with a rate of 3% recorded since 2005. However, the percentage of overseas guests has fallen by one percentage point year-on-year since 2005 to 4% in 2007.

### 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-6– Hotels - Percentage of Business Guests 2007 (%)**



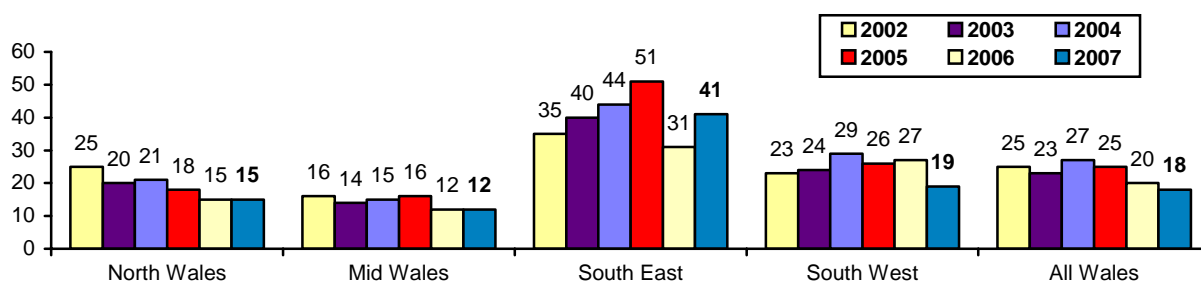
In contrast to the trend for overall occupancy levels, the percentage of business guests was highest at the start and end of the year. The highest proportion of business guests was recorded in January (33%). The rate recorded fell to 10% in August, before rising again to 24% in December.

As shown in Table C-4, overleaf, the annual average proportion of business guests was 18%, a slight decrease on the rate recorded in 2006 (20%) but higher than in 2005 (15%). There were some noticeable variations in the percentage of business guests between 2006 and 2007, most notably during the months of January, February, March and October where the 2007 rate was between five and eight percentage points lower than in 2006. The proportion of business guests was higher in 2007 than in the previous year for one month, December, where the percentage of business guests was six percentage points higher than in 2006 (24% and 18% respectively). The annual average in 2007 is the lowest rate recorded since 2002.

**Table C-4 Trends in Percentage of Business Guests**

	% of business guests					
	2002	2003	2004	2005	2006	2007
January	40	36	41	45	41	33
February	34	33	38	37	30	25
March	28	30	39	30	28	21
April	30	21	25	26	15	15
May	23	18	24	19	17	18
June	18	19	20	21	17	16
July	23	17	22	19	17	14
August	18	13	15	14	14	10
September	22	20	21	22	15	12
October	27	28	25	25	21	15
November	34	38	38	34	24	23
December	21	26	24	28	18	24
<b>Annual Average</b>	<b>25</b>	<b>23</b>	<b>27</b>	<b>25</b>	<b>20</b>	<b>18</b>

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 twenty-two and twenty-nine percentage points compared to other regions. This is perhaps no surprise given that the South East region encompasses the city of Cardiff. Following a decrease of twenty percentage points between 2005 and 2006, the percentage of business guests in the South East rose by ten percentage points to 41% in 2007. Both the North and Mid Wales regions recorded the same percentage of business guests in 2007 as were recorded in 2006. The South West was the only region to record a decrease in their percentage of business guests, with the 2007 annual average (19%) eight percentage points lower than the comparative figure for 2006 (27%).

**Figure C-7–Hotels – Annual Average Percentage of Business Guests by Region 2002 – 2007 (%)**

## 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 2007 are presented in Figure B-8 below. Due to the small sample size there is no analysis for hotels with 1-3 rooms.

The monthly bed and room occupancy levels for each of the size categories used in the analysis are detailed in Appendix 2b and 2c of this report.

**Figure C-8- Annual Occupancy by Size of Hotel - 2007 (%)**

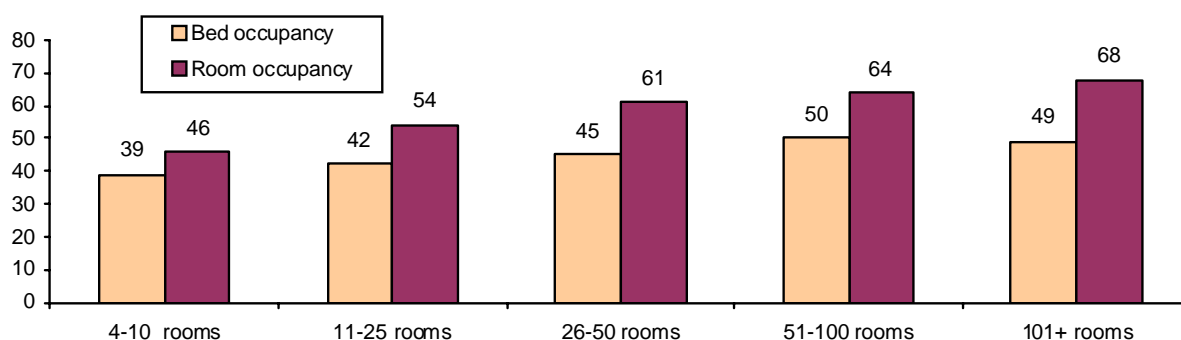


Figure C-8 above illustrates a generally positive relationship between the size of hotels and occupancy levels. Hotels with over 100 rooms recorded an average bed occupancy rate that was ten percentage points higher than the rate recorded for hotels with 4-10 rooms, while there was a twenty-two percentage point difference between the average room occupancy rates recorded by hotels in these two size bands. One exception was that hotels with 51-100 rooms recorded a slightly higher average bed occupancy rate in 2007 than the average for those in the largest size band (50% and 49% respectively).

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-5- Trends in Annual Room Occupancy Rates by Size of Hotel (%)**

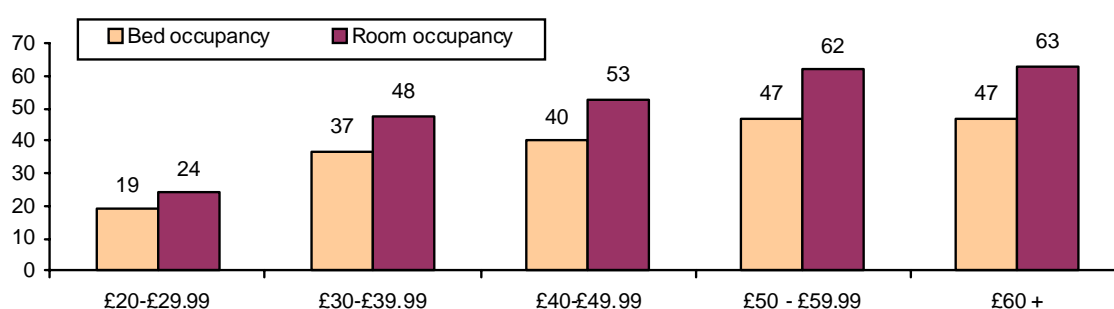
	Annual Average Room Occupancy									
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
4-10 rooms	44	42	40	43	43	44	48	47	47	46
11-25 rooms	50	49	46	49	51	50	50	52	53	54
26-50 rooms	53	54	56	55	53	54	56	56	58	61
51-100 rooms	56	54	59	60	60	63	66	60	62	64
101+ rooms	65	66	65	67	68	68	68	69	71	68

Hotels in the 11-25, 26-50 and 51-100 size bands all recorded a slight increase in their annual average room occupancy rate compared to 2006, with those in the 11-25 and 26-50 size bands recording their highest annual average room occupancy rate since 1998. Establishments in the smallest and largest size bands both recorded a decrease in their annual average room occupancy rates in 2007 compared to the previous year.

#### *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 2b and 2c of this section of the report.

Figure C-9 below presents annual bed and room occupancy figures by tariff for 2007. There is no analysis for hotels with a tariff of less than £20 as no establishments with this tariff participated in the survey in 2007.

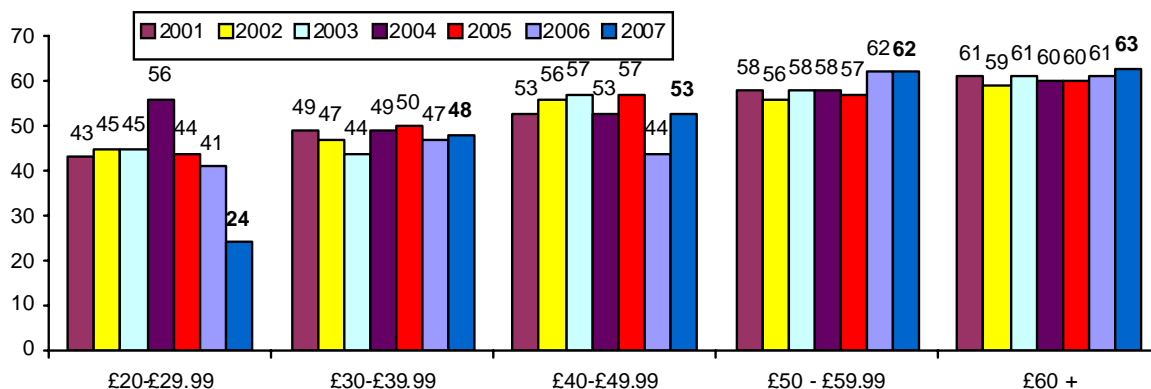
**Figure C-9- Annual Occupancy by Tariff of Hotel – 2007 (%)**

Overall, a positive relationship between the tariff charged and occupancy levels for hotels was recorded in 2007. Establishments charging £60 or more recorded an annual average bed occupancy rate that was twenty-eight percentage points higher than the rate recorded by those charging £20-£29.99, while there was a thirty-nine percentage point difference between the annual average room occupancy rate recorded for hotels in these two tariff bands. In 2007,

hotels charging £50-£59.99 recorded an annual average bed occupancy rate equal to that recorded for establishments charging £60 or more (47%), with only a one percentage point difference between the annual average room occupancy rates recorded for these two tariff bands (62% and 63% respectively).

Figure C-10 below shows the annual average room occupancy rates by tariff for 2001 - 2007.

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



Following a significant decrease between 2005 and 2006, hotels charging £40-£49.99 recorded an increase of nine percentage points in their average annual room occupancy rate between 2006 and 2007 (44% and 53% respectively). The annual average room occupancy rate for those charging £60 or more rose slightly in 2007 to 63% from 61% in 2006, the highest rate recorded for this tariff band since 2001.

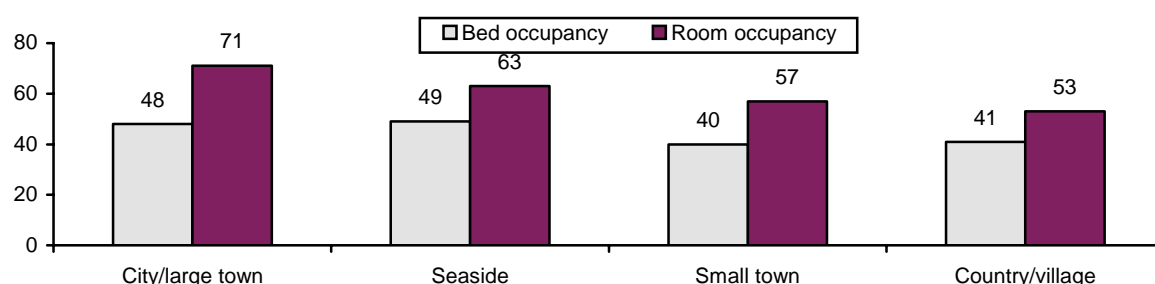
Between 2006 and 2007, the annual average room occupancy rate for hotels charging £20-£29.99 has fallen significantly from 41% to 24%. It should be noted that the overall sample size for this category has also fallen quite significantly and that for some months, the number of returns for this tariff 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 country/village. The monthly bed and room occupancy levels for each of the location categories are detailed in Appendix 2b and 2c to this report.

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

**Figure C-11- Annual Occupancy by Location of Hotel - 2007 (%)**



In line with previous findings, the highest annual bed and room occupancy levels in 2007 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 in these establishments. In contrast, hotels in 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-6- Trends in Annual Room Occupancy Rates by Location of Hotel (%)**

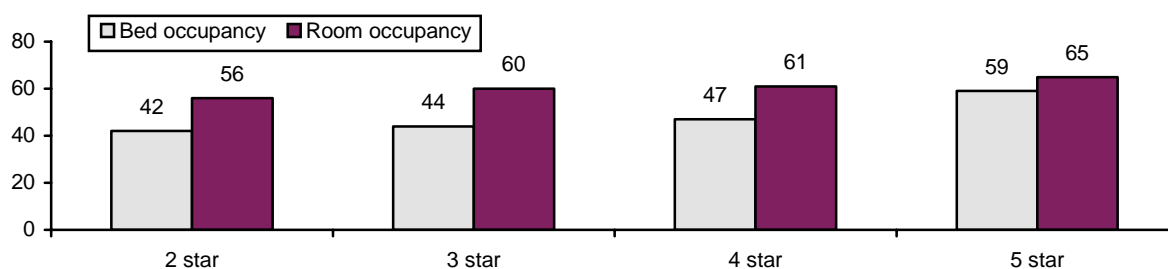
	Annual Room Occupancy									
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
City/large town	64	64	60	66	69	72	69	67	71	71
Small town	49	50	51	54	52	53	54	56	57	57
Seaside	54	53	56	56	56	57	56	56	57	62
Country/village	49	46	46	48	49	52	53	53	53	52

Between 2006 and 2007, the largest increase in annual average room occupancy was recorded by establishments in seaside areas, with the rate for 2007 (62%) five percentage points higher than in 2006 (57%) and the highest rate recorded for this location since 1998. The annual average room occupancy rate for hotels in city/large town and small town areas remained equal with the rate recorded in 2006, while there was a slight decrease in the rate recorded for establishments in country/village locations (53% in 2006 and 52% in 2007).

### 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. Those establishments not graded within the Visit Wales grading scheme may be graded within other existing grading schemes.

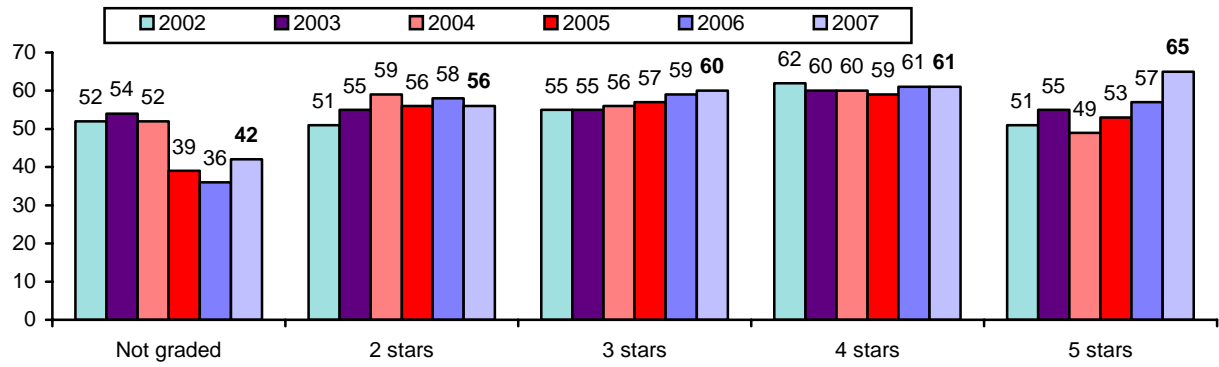
**Figure C-12- Annual Occupancy by Grading of Hotel – 2007 (%)**



Within the Visit Wales grading scheme, there appeared to be a positive correlation between grading and occupancy levels. Establishments with a five star grading recorded the highest average bed and room occupancy rates in 2007 of 59% and 65% respectively, while hotels with a 2 star grading recorded the lowest average bed and room occupancy rates of 42% and 56% in 2007.

As illustrated in Figure C-13 overleaf, annual average room occupancy rates for hotels with a 3 or 4 star grading have remained reasonably consistent since 2000. The average room occupancy rate for 2 star establishments has also been relatively consistent in recent years, however, establishments in this category have recorded an overall increase of thirteen percentage points since 2000. Since 2004, the annual average room occupancy rate has increased by sixteen percentage points (from 49% to 65% in 2007). Monthly and annual average room occupancy figures for grading are presented in Appendix 2b and 2c.

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



## D Guest Houses and Bed and Breakfasts

### Sample Size

In 2007, 107 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.

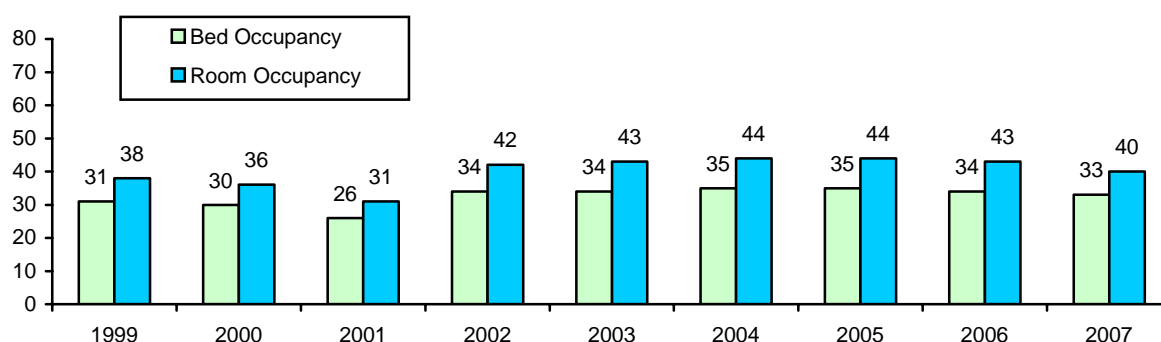
68% of the operators (73) who contributed to the survey provided data for every month of the year. A further 15% (16) provided data for all but one month.

During 2007, 4 guest house and bed and breakfast establishments were recruited to take part in the survey. However, in the same period 22 establishments withdrew or were deleted from the survey. Establishments were deleted as they had not sent returns in a long period 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 2007 were relatively consistent with previous years. Room occupancy rates however recorded a 4 percentage point fall in the last two years – down to 40%.

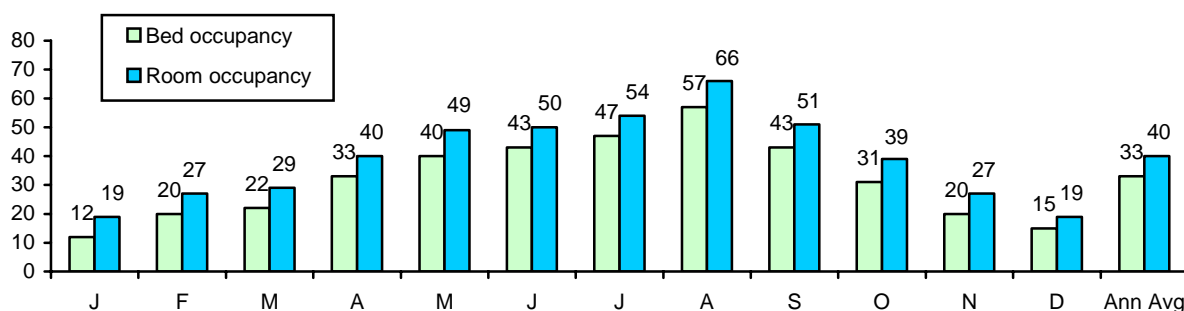
**Figure D-1- Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)**



## 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 2007 are presented in Figure D-2 below.

**Figure D-2- Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2007 (%)**



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 12% in January, peaking in August at 57% before falling to 15% in December. The annual average bed occupancy was 33%.

Room occupancy levels followed a similar pattern and had an annual average of 40%.

As shown in Table D-1 overleaf, the annual average room occupancy figures for 2007 were lower than 2006 (40% vs. 43%). The year started encouragingly with January to March recording similar or slightly higher occupancy rates compared to 2006. For the rest of the year however occupancy figures were lower than 2006, most notably during the summer months of June to September (in July an 11% difference was recorded between 2006 and 2007). The month of December was also notably lower (27% in 2006 vs. 19% in 2007).

Trends in monthly bed occupancy rates are presented in Appendix 3a.

**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
January	16	15	14	22	21	22	26	17	19
February	19	24	20	26	27	27	29	27	27
March	25	24	14	34	30	29	36	28	29
April	34	37	24	33	45	44	40	42	40
May	43	40	34	45	52	49	49	52	49
June	47	47	38	57	50	57	56	57	50
July	57	56	51	60	61	64	63	65	54
August	68	67	60	70	72	73	72	71	66
September	47	44	42	54	54	56	59	56	51
October	36	31	32	41	39	43	41	43	39
November	24	18	22	29	30	28	24	28	27
December	19	18	17	24	24	25	20	27	19
<i>Annual Average</i>	38	36	31	42	43	44	44	43	40

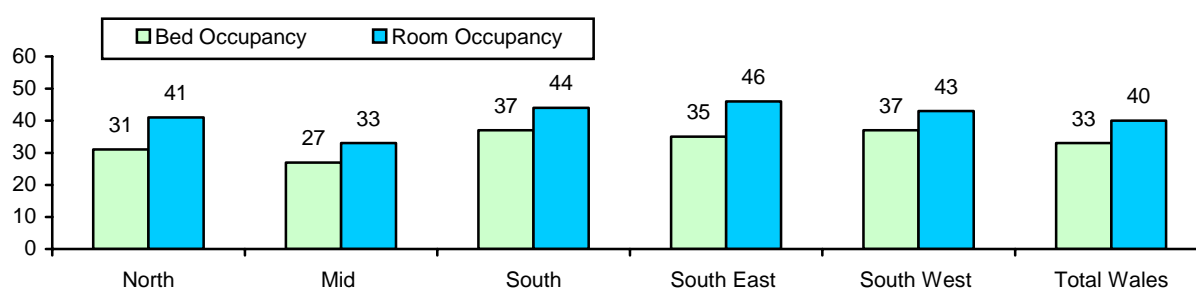


## Occupancy Rates by Regions of Wales

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 2007. A definition of these regions is presented in the previous section on hotels. The monthly bed and room occupancy rates for each area are presented in Appendix 3b and 3c of this report.

Bed and room occupancy levels by unitary authority are presented in Appendix 3d and 3e. 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 – 2007 (%)**



Annual bed occupancy levels were highest in the South West (37%) with the annual room occupancy rates at their highest in the South East (46%). As with last year, occupancy levels in Mid Wales were noticeably lower, recording 27% for bed occupancy and 33% for room occupancy.

The greatest difference between the annual bed and room occupancy rates recorded in 2007 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 Occupancy Rates by Regions of Wales

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 (%)**

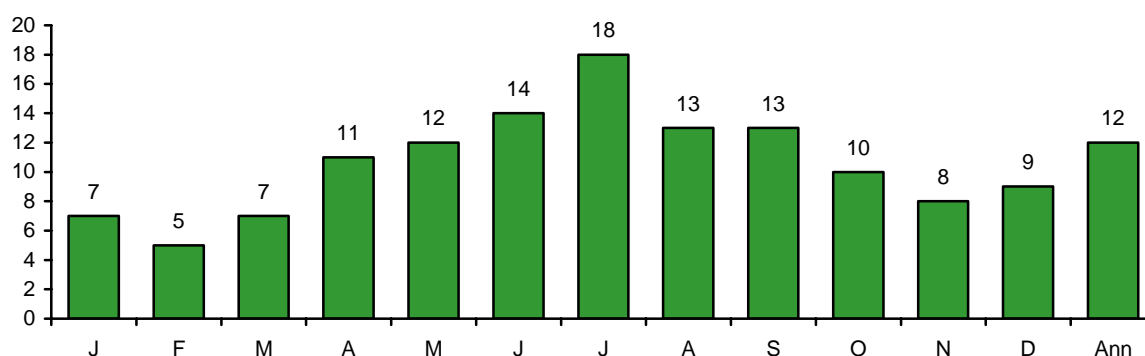
	Annual Average Room Occupancy								
	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Wales	36	31	29	38	40	42	44	43	41
Mid Wales	32	32	24	33	33	33	34	33	33
South Wales	43	41	37	50	49	50	49	48	44
South East Wales	43	43	37	52	52	52	51	49	46
South West Wales	39	36	36	48	46	48	47	48	43
Total Wales	38	36	31	42	43	44	44	43	40

With the exception of Mid Wales, room occupancy levels across the different regions in 2007 were lower than 2006. The biggest decrease was recorded in the South West (48% in 2006 vs. 43% in 2007).

### Percentage of Overseas Guests

As with hotels, on the monthly occupancy form guest house and bed and breakfast operators are asked to identify the number of guests staying in the hotel each night by nationality - UK and overseas. It should be noted that not all respondents provide this information.

**Figure D-4– Guest Houses/B&Bs - Percentage of Overseas Guests- 2007 (%)**



As in 2006, overseas occupancy reached a maximum during the peak summer month of July (18%) and was lowest during February when a rate of 5% was recorded. The annual average percentage of overseas guests in guest houses and bed and breakfast establishments in 2007 was 12%.

### Trends in Percentage of Overseas Guests

After a decrease in the proportion of overseas guests in 2003 to 10%, which was the lowest figure recorded since 1998, the proportion has increased over the past three years and returned to a level similar to those recorded in 2001 and 2002, albeit significantly lower than 1999 levels.

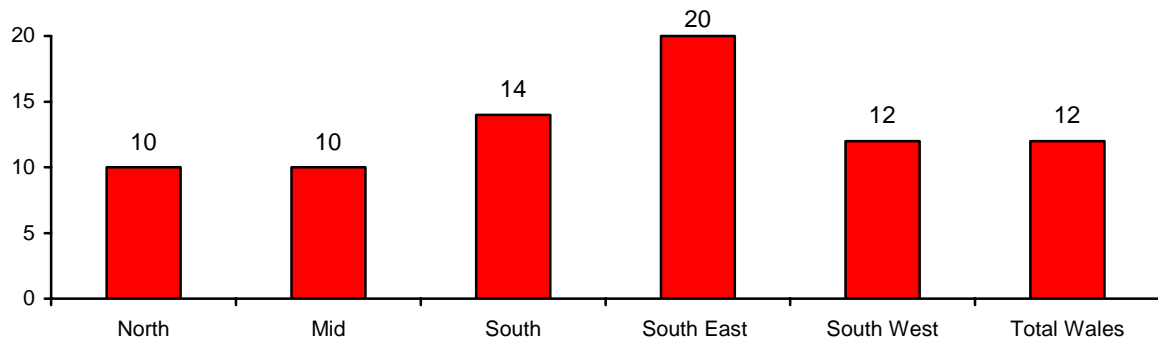
On a monthly basis, the proportion of overseas guests in 2007 was similar to 2005 and 2006. The month of July recorded a 2 percentage point increase in the percentage of overseas guests compared to the previous two years (18% in 2007 vs. 16% in 2005 and 2006). The month of April also recorded a small increase of 1 percentage point comparative to last year.

**Table D-3 - Guest Houses/B&Bs - Trends in Percentage of Overseas Guests**

	% of overseas guests								
	1999	2000	2001	2002	2003	2004	2005	2006	2007
January	15	13	11	9	7	10	9	8	7
February	10	9	7	9	5	7	6	6	5
March	17	13	10	10	7	9	12	9	7
April	19	16	12	11	8	10	10	10	11
May	22	17	12	15	12	13	16	14	12
June	24	22	16	16	14	14	16	15	14
July	27	24	16	18	15	17	16	16	18
August	24	19	14	14	10	14	14	15	13
September	23	17	13	12	11	13	14	15	13
October	18	14	15	11	8	10	11	12	10
November	18	13	10	8	10	9	7	9	8
December	13	17	8	11	6	7	8	11	9
<b>Annual Average</b>	<b>20</b>	<b>18</b>	<b>13</b>	<b>13</b>	<b>10</b>	<b>12</b>	<b>13</b>	<b>13</b>	<b>12</b>

As illustrated in Figure D-5 overleaf, the percentage of overseas guests across the different geographical areas in Wales was in the region of 10-20% (a wider variation than in 2006 which recorded 11%-17%), with the South East recording the highest proportion of overseas occupants.

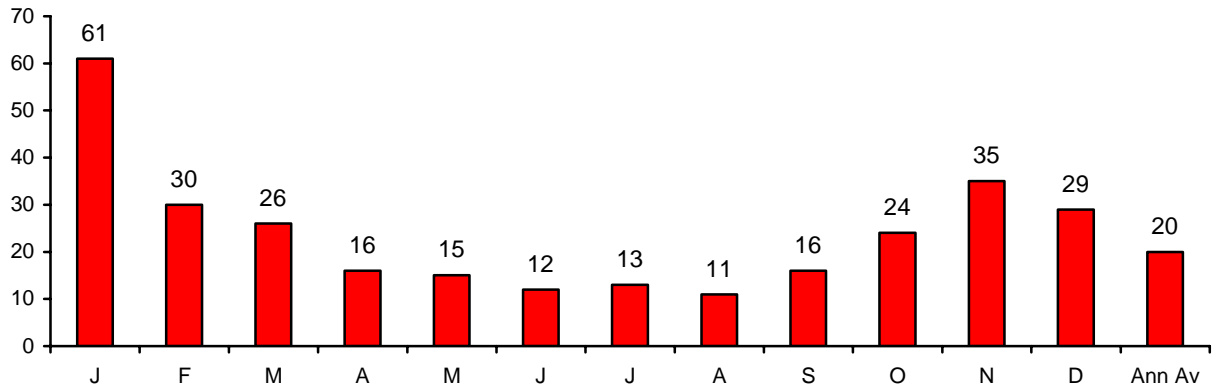
**Figure D-5 - Guest Houses/B&Bs - Percentage of Overseas Guests by Region – 2007 (%)**



### Percentage of Business Guests

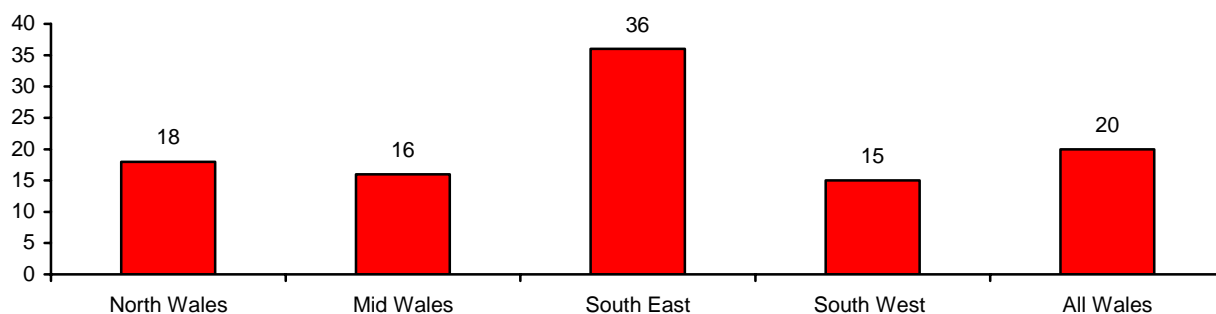
As with hotels, since February 2001 guest house and bed and breakfast operators have been asked to record the number of guests staying for business purposes.

**Figure D-6 - Guest Houses/B&Bs - Percentage of Business Guests – 2007 (%)**



The annual average proportion of business guests in bed and breakfast and guest house establishments in 2007 was 20% - a 1 percentage point increase on 2006. The percentage of business guests was at its highest in January (61%) – a significant rise of 16 percentage points compared to January 2006. In contrast and as in 2006, the proportion of business guests was lowest during the month of August (11%).

**Figure D-7 - Guest Houses/B&BS – Annual Average Percentage of Business Guests by Region – 2007 (%)**



As with previous years, the percentage of business guests in the South East was significantly higher in 2007 than the other areas in Wales. This pattern is similar to that shown for hotels, where the South East, also recorded higher business occupancy levels.

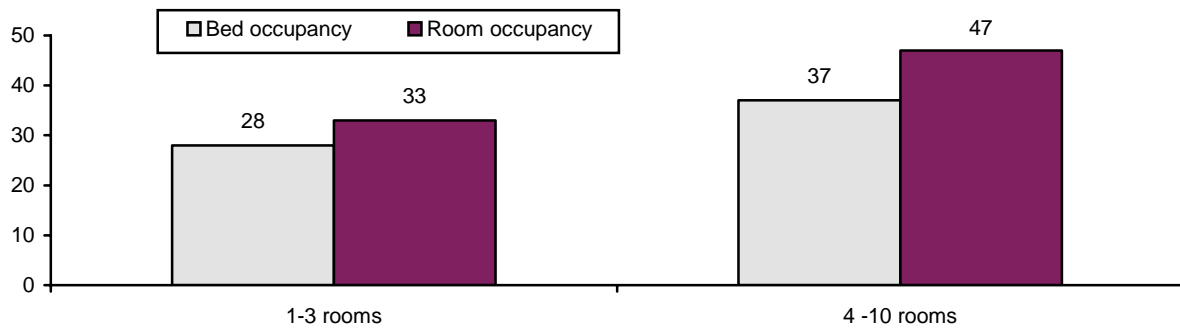
### **Detailed Analysis of Main Results**

This section of the report looks in more detail at different types of guest house and bed and breakfast establishments who 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 3b and 3c.

**Figure D-8- Annual Occupancy by Size of Guest House/Bed & Breakfast - 2007 (%)**

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 (9 and 14 percentage points respectively) in the establishments with 4-10 rooms. The higher occupancy amongst larger 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; they are more likely to attract business visitors as well as be more likely to be actively involved in the marketing of the establishment.

**Table D-4 - 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
1-3 rooms	35	32	26	33	34	36	36	34	33
4-10 rooms	41	40	36	45	45	48	48	47	47

Bed and room occupancy rates for establishments with 1-3 rooms and 4-10 rooms in 2007 were relatively similar to those recorded in 2006 – just a 1 percentage point fall for 1-3 room establishments.

### *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 3b and 3c 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-9 below presents annual bed and room occupancy figures by tariff for 2007.

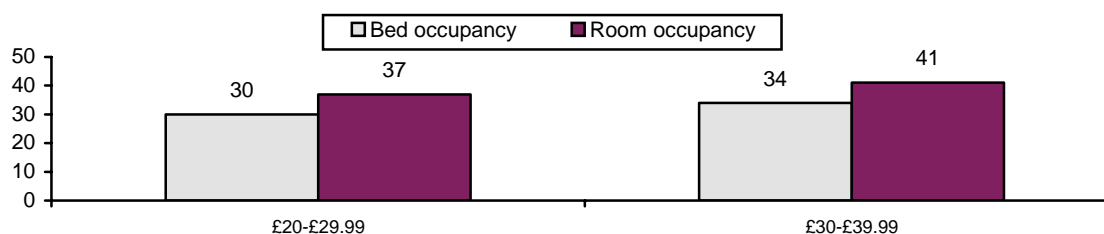
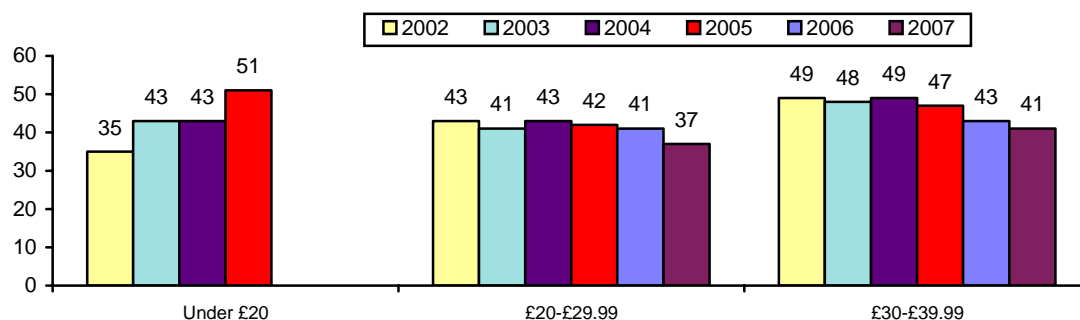
**Figure D-9- Annual Occupancy by Tariff of Guest House/B&B – 2007 (%)**

Figure D-10 overleaf presents the annual average bed occupancy rates by tariff between 2002 and 2007. 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-10- Trends in Annual Room Occupancy Rates by Tariff of Guest Houses/B&BS (%)**



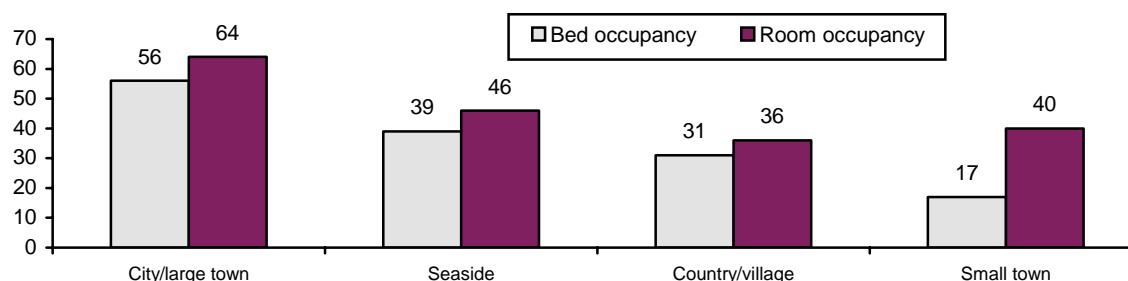
The annual room occupancy rates for establishments charging £20-29.99 have remained relatively consistent over the last five years, although this year has seen a 4 percentage point fall compared to 2006. Establishments charging £30-39.99 have seen an 8 percentage point fall since 2004. The sample size 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 3b and 3c.

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 2006, the second highest rates in 2007 were recorded by establishments located in seaside areas with annual bed and room occupancy rates recorded as 39% and 46% respectively.

**Figure D-11 - Annual Occupancy by Location of Guest House/B&B - 2007(%)**



**Table D-5- 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
City/large town	*	*	55	67	70	63	64	67	64
Small town	40	37	28	43	39	38	42	41	40
Seaside	43	39	39	37	44	46	47	47	46
Country/village	34	33	27	41	40	41	41	40	36

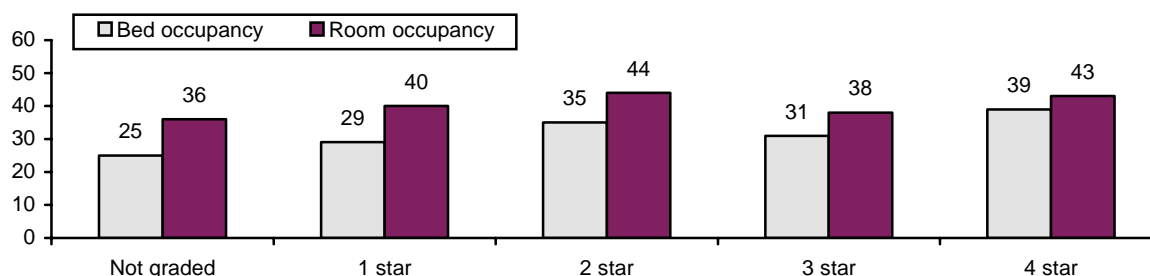
\* Data not available due to change in bands for analysis

Establishments in cities and large towns and countries and villages recorded a 3-4 percentage point decrease compared to 2006.

#### *Occupancy by Grading*

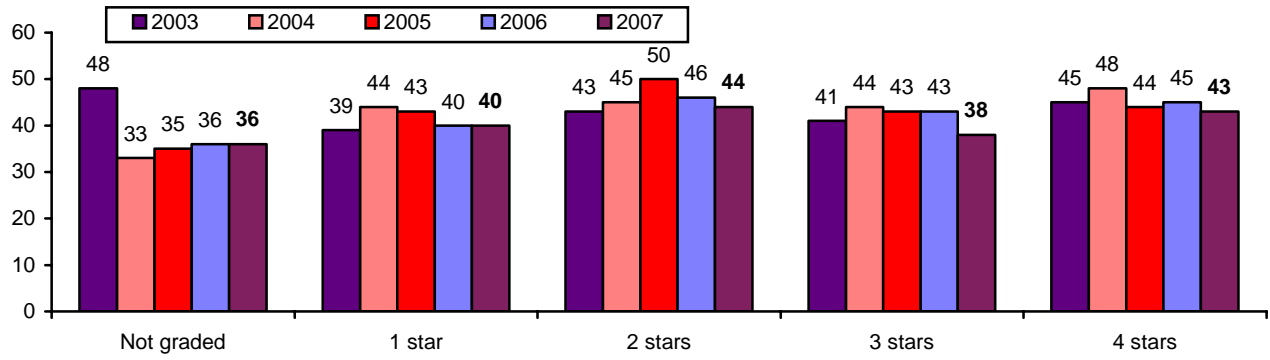
As with hotels, occupancy rates for guest house and bed and breakfast establishments were analysed according to their grading under the Star Grading Scheme administered by Visit Wales (formerly Wales Tourist Board), introduced in 1999. On this basis, there are no comparable figures available prior to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

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

**Figure D-12 -Occupancy by Grading of Guest House/B&B- 2007 (%)**

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 fourteen and seven percentage points higher than those not part of the Visit Wales grading scheme. As shown in figure C-13 overleaf, the annual average room occupancy rates in 2007 for non graded and 1 star establishments were similar to 2006. 2, 3 and 4 star establishments however all recorded a decrease compared to last year (3 star establishments recording the largest decrease – 5 percentage points).

**Figure D-13 - 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 3b and 3c to the report.

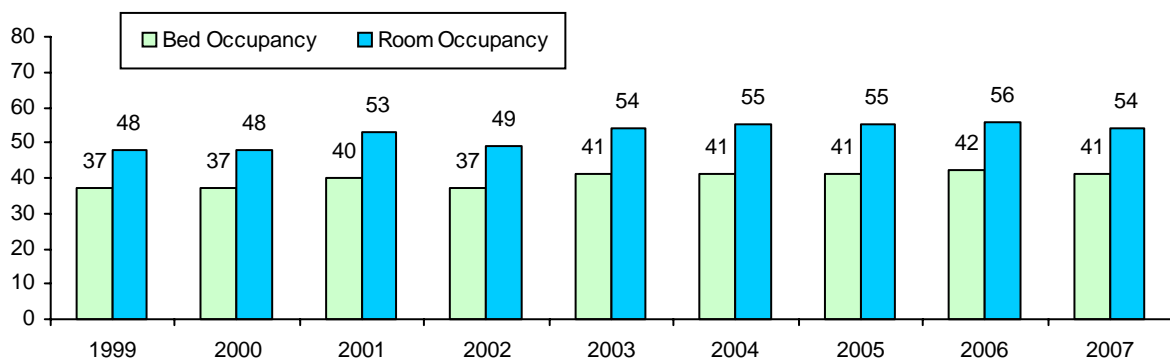
## E All Serviced Accommodation

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

In 2007, both the annual bed and room occupancy levels for all types of serviced accommodation remained relatively consistent with those recorded since 2003 (in the range 41% - 42% and 54 – 56% respectively).

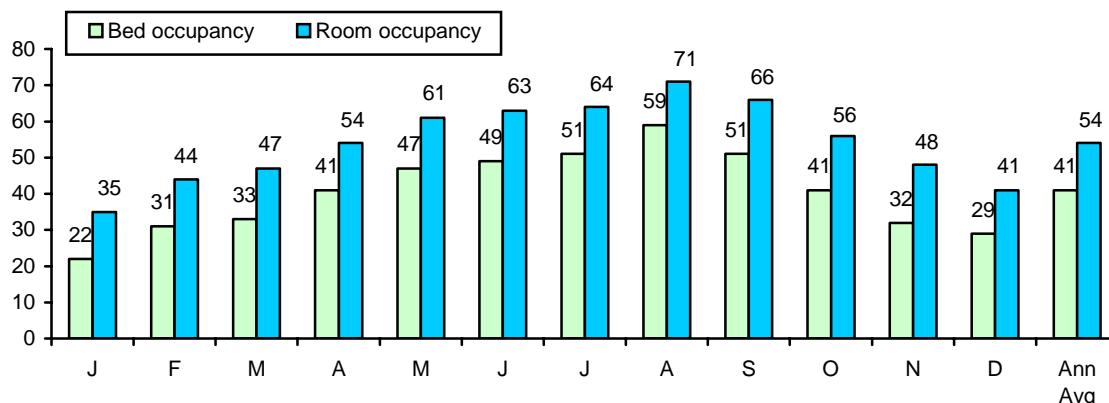
**Figure E-1- Serviced Accommodation - Trends in Occupancy Rates - Annual Averages (%)**



### 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 - 2007 (%)**

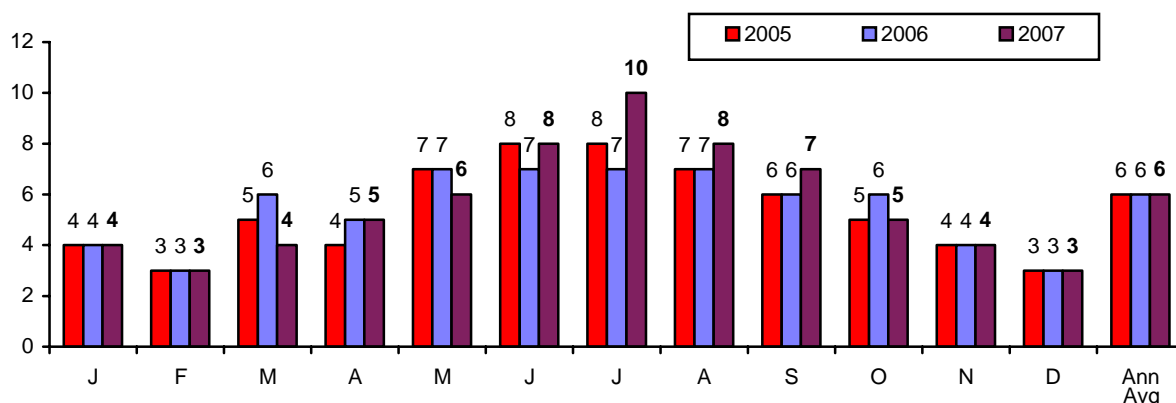


Bed and room occupancy levels were both at their highest during the main summer tourist season, peaking at 59% and 71% respectively in August.

### 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.

**Figure E-3– All Serviced Accommodation - Percentage of Overseas Guests – 2007 (%)**



The proportion of overseas guests was very consistent with those recorded since 2005. The month of July recorded a 3 percentage point increase compared to 2006 (7% vs. 10%). Reflecting these results, the overall averages in 2007 was the same as in both 2005 and 2006 (6%) but lower than the comparative figures recorded in 2002.

# Appendix 1: Monthly Forms

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## Appendix 2: Hotels

### Appendix 2a - Hotels: Bed Occupancy 2006 (%)

	<b>Bed occupancy</b>									
	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>
January	22	21	21	22	23	25	24	25	24	24
February	31	28	29	31	33	33	33	33	35	35
March	31	31	31	31	37	36	36	37	35	35
April	39	38	41	39	37	43	41	41	44	44
May	47	43	43	47	45	48	48	46	49	49
June	47	47	46	48	50	47	48	49	50	50
July	53	53	53	52	51	52	53	52	56	56
August	58	57	57	60	58	59	56	56	60	60
September	50	50	48	49	48	50	51	51	55	55
October	40	41	41	43	42	43	42	42	45	45
November	31	32	33	40	35	34	35	34	37	37
December	27	27	30	32	30	31	33	32	34	34
<b>Annual Average</b>	<b>42</b>	<b>40</b>	<b>39</b>	<b>41</b>	<b>41</b>	<b>42</b>	<b>42</b>	<b>42</b>	<b>44</b>	<b>44</b>



## Appendix 2b - Hotels: Bed Occupancy 2007 (%)

	2007 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
<b>All Wales</b>	26	35	37	44	50	51	53	60	54	45	38	34	44
<b>North Wales</b>	26	36	38	46	52	53	55	64	57	47	41	36	46
<b>Mid Wales</b>	25	37	36	43	48	47	49	56	51	42	37	34	42
<b>South Wales</b>	26	34	37	42	49	51	53	57	52	43	35	33	42
<b>South East Wales</b>	27	34	38	37	46	49	50	47	49	42	38	35	41
<b>South West Wales</b>	26	34	35	45	51	52	56	69	55	44	32	31	44
<b>1-3 rooms</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>4-10 rooms</b>	19	29	34	38	45	45	49	58	48	37	27	29	39
<b>11-25 rooms</b>	27	34	34	43	47	48	51	59	52	43	33	33	42
<b>26-50 rooms</b>	27	37	39	44	48	51	52	62	54	47	41	36	45
<b>51-100 rooms</b>	30	43	40	49	56	56	57	63	59	51	47	41	50
<b>Over 100 rooms</b>	31	37	45	47	60	58	59	61	63	47	45	33	49
<b>Under £20</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>£20-£29.99</b>	*	14	14	19	25	20	32	36	18	9	*	*	19
<b>£30-£39.99</b>	15	27	37	42	50	47	49	53	46	35	28	26	37
<b>£40-£49.99</b>	24	32	37	41	45	46	50	52	51	42	31	28	40
<b>£50-£59.99</b>	28	36	38	46	56	55	57	60	57	47	47	37	47
<b>£60 &amp; over</b>	30	39	40	46	52	54	55	65	58	49	41	36	47
<b>Not graded</b>	*	*	*	*	31	*	44	*	*	*	*	*	*
<b>1 star</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>2 stars</b>	27	33	40	37	50	46	52	51	43	34	38	39	42
<b>3 stars</b>	25	33	37	44	50	52	53	59	56	46	38	34	44
<b>4 stars</b>	31	43	39	48	51	52	52	68	56	49	40	37	47
<b>5 stars</b>	32	45	50	60	65	65	69	78	71	68	53	43	59
<b>City/large town</b>	36	44	47	45	58	57	60	54	58	44	43	35	48
<b>Countryside/village</b>	24	30	35	40	47	49	51	60	52	43	34	29	41
<b>Seaside</b>	29	46	39	51	52	53	54	66	59	49	44	43	49
<b>Small town</b>	22	28	34	40	50	48	49	55	50	42	34	33	40

\* Sample size too small to undertake an analysis

## Appendix 2c - Hotels: Room Occupancy 2007 (%)

	2007 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
<b>All Wales</b>	40	50	53	58	65	67	67	73	71	62	55	47	59
<b>North Wales</b>	37	47	50	58	65	68	67	74	72	62	55	46	59
<b>Mid Wales</b>	33	45	47	54	61	62	61	68	64	54	48	44	53
<b>South Wales</b>	43	53	57	59	66	69	70	73	73	65	60	50	61
<b>South East Wales</b>	45	59	62	60	67	69	71	68	76	71	64	57	63
<b>South West Wales</b>	41	49	50	58	65	68	68	78	70	60	49	40	58
<b>1-3 rooms</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>4-10 rooms</b>	26	37	42	45	55	57	58	65	55	43	32	35	46
<b>11-25 rooms</b>	39	46	47	55	60	61	63	69	67	56	46	43	54
<b>26-50 rooms</b>	42	54	56	60	67	70	69	75	74	66	59	49	61
<b>51-100 rooms</b>	41	57	55	65	70	72	70	77	78	69	65	52	64
<b>Over 100 rooms</b>	47	59	66	63	74	77	78	79	83	74	70	56	68
<b>Under £20</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>£20-£29.99</b>	*	20	19	24	34	25	37	40	22	12	*	*	24
<b>£30-£39.99</b>	22	39	51	51	61	57	57	63	55	46	37	37	48
<b>£40-£49.99</b>	36	45	53	56	60	62	66	64	65	55	43	38	53
<b>£50-£59.99</b>	41	53	56	58	73	75	73	72	75	65	65	48	62
<b>£60 &amp; over</b>	44	54	56	62	66	71	70	78	77	69	61	51	63
<b>Not graded</b>	*	*	*	*	45	*	57	*	*	*	*	*	*
<b>1 star</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>2 stars</b>	37	47	55	53	61	60	65	65	61	50	54	49	56
<b>3 stars</b>	40	50	54	58	67	70	70	73	74	64	55	47	60
<b>4 stars</b>	43	54	54	63	63	68	65	79	74	65	57	50	61
<b>5 stars</b>	39	48	55	66	71	74	73	82	78	78	61	47	65
<b>City/large town</b>	55	70	71	63	74	80	79	75	83	77	77	61	71
<b>Countryside/village</b>	34	39	46	50	59	64	63	69	65	56	48	38	52
<b>Seaside</b>	40	59	52	64	66	68	68	78	75	65	56	54	62
<b>Small town</b>	36	44	52	59	66	64	66	71	69	60	51	50	57

\* Sample size too small to undertake an analysis

## Appendix 2d - Hotels: Bed Occupancy by Unitary Authority 2007 (%)

	2007 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
<b>Anglesey</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Bridgend</b>	*	*	26	*	34	38	*	48	44	38	52	48	*
<b>Caerphilly</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Cardiff</b>	*	*	*	*	*	*	63	*	*	*	*	*	*
<b>Carmarthenshire</b>	*	*	*	31	*	*	*	*	*	*	*	*	*
<b>Ceredigion</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Conwy</b>	26	37	38	45	49	52	52	63	57	46	40	39	46
<b>Denbighshire</b>	*	*	32	36	40	42	43	46	45	39	32	*	37
<b>Flintshire</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Gwynedd</b>	26	40	39	55	64	62	65	75	67	54	50	38	54
<b>Merthyr Tydfil</b>	*	*	*	*	*	*	*	-	-	-	-	-	-
<b>Monmouthshire</b>	18	26	35	41	46	47	48	48	46	39	29	*	38
<b>Neath &amp; Port Talbot</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Newport</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Pembrokeshire</b>	22	26	30	42	47	48	54	67	52	39	26	27	40
<b>Powys</b>	25	27	36	38	44	41	43	47	46	40	35	32	38
<b>Rhondda Cynon Taff</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Swansea</b>	38	49	50	55	61	66	*	78	68	48	41	*	*
<b>Torfaen</b>	*	*	*	*	-	*	-	*	*	-	*	*	*
<b>Vale of Glamorgan</b>	-	-	*	-	-	-	-	-	-	-	-	-	-
<b>Wrexham</b>	*	*	*	*	*	*	*	*	*	*	*	*	*

\* = small sample size; - = no returns received



## Appendix 3: Guest Houses and Bed & Breakfasts

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

	Bed occupancy									
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
January	12	10	11	10	15	13	14	17	12	12
February	18	13	18	15	19	20	21	21	20	20
March	18	19	19	9	27	23	21	27	20	21
April	28	28	31	20	25	37	36	30	35	33
May	38	36	34	29	36	43	41	39	41	40
June	37	38	40	32	48	41	47	47	46	43
July	46	50	48	44	51	50	54	53	56	47
August	60	61	61	54	62	63	64	64	62	57
September	39	38	37	34	43	42	46	48	45	43
October	25	28	26	25	32	30	34	33	32	31
November	14	18	13	16	22	21	20	17	19	20
December	11	15	13	12	17	17	18	14	19	15
<b>Annual Average</b>	30	31	30	26	34	34	35	35	34	<b>33</b>

## Appendix 3b - Guest houses/bed &amp; breakfasts: Bed Occupancy 2007 (%)

	2007 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
<b>All Wales</b>	12	20	21	33	40	43	47	57	43	31	20	15	33
<b>North Wales</b>	12	22	19	34	38	42	44	61	41	25	16	14	31
<b>Mid Wales</b>	10	16	18	30	35	34	38	46	34	28	18	14	27
<b>South Wales</b>	14	21	25	34	45	48	53	62	51	36	23	15	37
<b>South East Wales</b>	18	24	26	36	38	40	48	52	46	41	33	20	35
<b>South West Wales</b>	11	19	25	34	47	51	55	66	53	34	17	13	37
<b>1-3 rooms</b>	10	16	17	28	35	38	41	52	37	26	14	11	28
<b>4-10 rooms</b>	14	24	27	37	45	47	52	61	49	34	24	18	37
<b>11-25 rooms</b>	-	-	-	-	-	-	-	-	*	-	-	-	-
<b>26-50 rooms</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>51-100 rooms</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Over 100 rooms</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Under £20</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>£20-£29.99</b>	12	18	20	31	36	40	44	55	41	29	20	14	30
<b>£30-£39.99</b>	10	19	23	33	45	45	48	58	44	32	16	14	34
<b>£40-£49.99</b>	*	*	*	45	58	61	67	*	66	*	*	*	*
<b>£50-£59.99</b>	*	*	*	*	*	*	*	*	*	*	*	-	*
<b>£60 &amp; over</b>	*	-	*	*	*	*	*	*	*	*	*	*	*
<b>Not graded</b>	11	23	20	32	27	32	33	45	27	27	20	14	25
<b>1 star</b>	*	*	14	*	*	*	*	*	*	*	*	*	*
<b>2 stars</b>	13	20	27	35	40	46	50	61	52	42	26	17	35
<b>3 stars</b>	13	20	20	31	38	40	45	54	40	26	18	14	31
<b>4 stars</b>	9	18	20	38	55	52	56	65	52	35	13	14	39
<b>5 stars</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>City/large town</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Countryside/village</b>	10	18	20	32	40	42	45	55	42	28	17	12	31
<b>Seaside</b>	14	18	22	36	44	47	55	69	50	39	17	15	39
<b>Small town</b>	12	15	19	29	35	34	39	45	35	28	22	17	27

\* Sample size too small to undertake an analysis; no returns received/no sample in this category

## Appendix 3c - Guest houses/bed &amp; breakfasts: Room Occupancy 2007 (%)

	2007 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
<b>All Wales</b>	19	27	29	40	49	50	54	65	51	39	27	19	40
<b>North Wales</b>	23	32	29	42	48	53	54	69	50	31	25	21	41
<b>Mid Wales</b>	14	21	24	35	42	41	43	52	38	34	25	14	33
<b>South Wales</b>	20	27	33	43	53	55	61	72	59	46	31	21	44
<b>South East Wales</b>	26	32	38	47	48	53	62	69	56	59	44	25	46
<b>South West Wales</b>	16	25	31	41	55	56	61	73	60	41	22	17	43
<b>1-3 rooms</b>	14	20	22	33	41	43	47	61	42	31	20	13	33
<b>4-10 rooms</b>	24	35	37	48	56	57	61	70	59	45	34	26	47
<b>11-25 rooms</b>	-	-	-	-	-	-	-	-	*	-	-	-	-
<b>26-50 rooms</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>51-100 rooms</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Over 100 rooms</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Under £20</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>£20-£29.99</b>	19	26	28	39	44	49	51	62	48	36	29	17	37
<b>£30-£39.99</b>	16	24	29	40	54	50	55	69	52	41	22	20	41
<b>£40-£49.99</b>	*	*	*	52	61	67	73	*	75	*	*	*	*
<b>£50-£59.99</b>	*	*	*	*	*	*	*	*	*	*	*	-	*
<b>£60 &amp; over</b>	*	-	*	*	*	*	*	*	*	*	*	*	*
<b>Not graded</b>	27	31	32	43	35	41	42	56	37	39	32	21	36
<b>1 star</b>	*	*		*	*	*	*	*	*	*	*	*	*
<b>2 stars</b>	20	28	35	41	49	56	60	67	63	54	35	24	44
<b>3 stars</b>	20	28	28	39	45	48	53	63	47	34	26	18	38
<b>4 stars</b>	11	22	25	44	62	55	58	74	55	39	17	17	43
<b>5 stars</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>City/large town</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Countryside/village</b>	14	25	26	39	47	48	50	63	47	34	22	16	36
<b>Seaside</b>	20	20	28	43	54	55	65	75	61	48	22	18	45
<b>Small town</b>	25	27	33	35	46	44	49	59	44	41	37	31	40

\* Sample size too small to undertake an analysis; no returns received/no sample in this category

## Appendix 3d - Guest houses/bed &amp; breakfasts: Bed Occupancy by Unitary Authority 2007 (%)

	2007 Monthly bed occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Anglesey	*	*	*	*	*	*	*	*	*	*	*	*	*
Bridgend	*	*	*	*	*	*	*	*	*	*	*	*	*
Caerphilly	*	*	*	*	*	*	*	*	*	*	*	*	*
Cardiff	*	*	*	*	*	*	*	*	*	*	*	*	*
Carmarthenshire	16	24	24	29	41	47	47	56	45	39	18	30	33
Ceredigion	*	*	20	31	38	46	42	57	35	23	*	*	31
Conwy	*	*	*	*	*	*	*	*	*	*	*	*	*
Denbighshire	*	*	*	28	28	43	35	42	33	23	*	*	*
Flintshire	*	*	*	*	*	*	*	*	*	*	*	*	*
Gwynedd	11	24	25	37	42	42	47	70	45	32	18	18	36
Merthyr Tydfil	-	-	-	-	-	-	-	-	-	-	-	-	-
Monmouthshire	*	*	*	*	37	35	42	44	39	41	25	13	*
Neath & Port Talbot	*	*	*	*	*	*	*	*	*	*	*	*	*
Newport	-	-	-	-	-	-	-	-	-	-	-	-	-
Pembrokeshire	10	18	18	30	49	51	57	70	54	25	10	10	38
Powys	11	15	17	29	33	31	36	40	29	27	18	14	26
Rhondda Cynon Taff	-	-	-	-	-	-	-	-	-	-	-	-	-
Swansea	*	16	30	42	45	54	61	65	62	46	*	*	39
Torfaen	-	-	-	-	-	-	-	-	-	-	-	-	-
Vale of Glamorgan	*	-	*	*	*	*	*	*	*	-	-	-	*
Wrexham	*	*	*	*	*	*	-	*	-	-	*	-	*

\* = small sample size; - = no returns received



## Appendix 3e - Guest houses/bed &amp; breakfasts: Room Occupancy by Unitary Authority 2007 (%)

	2007 Monthly room occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Anglesey</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Bridgend</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Caerphilly</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Cardiff</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Carmarthenshire</b>	22	35	30	35	54	56	55	56	51	48	26	39	41
<b>Ceredigion</b>	*	*	21	34	44	49	47	64	36	28	*	*	31
<b>Conwy</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Denbighshire</b>	*	*	*	37	40	51	46	59	46	31	*	*	*
<b>Flintshire</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Gwynedd</b>	18	34	36	45	52	53	56	75	55	38	28	24	44
<b>Merthyr Tydfil</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Monmouthshire</b>	*	*	*	*	49	45	53	55	49	54	31	19	*
<b>Neath &amp; Port Talbot</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Newport</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Pembrokeshire</b>	13	21	23	37	57	54	62	79	60	31	12	15	43
<b>Powys</b>	17	19	23	34	39	37	38	45	33	31	25	12	30
<b>Rhondda Cynon Taff</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Swansea</b>	*	21	40	52	50	60	68	77	73	60	26	18	46
<b>Torfaen</b>	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Vale of Glamorgan</b>	*	-	*	*	*	*	*	*	*	-	-	-	*
<b>Wrexham</b>	*	*	*	*	*	*	-	*	-	-	*	-	*

\* = small sample size; - = no returns received

## Appendix 4: All Serviced Accommodation

### Appendix 4a – All Serviced Accommodation: Trends in Bed Occupancy Rates – Monthly Averages (%)

#### Appendix 4a - All Serviced Accommodation: Bed Occupancy by Unitary Authority 2007 (%)

	2007 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
<b>Anglesey</b>	26	31	32	49	49	58	53	73	44	44	32	32	42
<b>Bridgend</b>	21	28	27	31	34	40	36	49	45	39	34	32	35
<b>Caerphilly</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Cardiff</b>	70	81	85	80	83	65	65	55	74	81	85	74	69
<b>Carmarthenshire</b>	17	25	28	30	48	50	49	57	48	42	29	31	37
<b>Ceredigion</b>	17	35	34	40	46	50	52	61	47	35	27	19	38
<b>Conwy</b>	25	37	36	44	48	51	52	62	56	45	39	38	45
<b>Denbighshire</b>	21	25	27	33	37	42	41	45	42	35	28	24	33
<b>Flintshire</b>	23	25	24	35	32	32	36	54	30	24	23	21	29
<b>Gwynedd</b>	20	36	35	48	57	55	59	74	60	47	40	33	48
<b>Merthyr Tydfil</b>	24	30	53	25	37	31	30	-	-	-	-	-	33
<b>Monmouthshire</b>	15	20	27	38	42	42	45	46	43	40	27	19	33
<b>Neath &amp; Port Talbot</b>	24	41	41	42	48	44	43	39	48	44	36	21	38
<b>Newport</b>	34	42	41	39	42	44	49	38	47	46	46	37	41
<b>Pembrokeshire</b>	19	24	27	38	48	49	55	68	52	35	22	24	40
<b>Powys</b>	18	21	26	33	39	36	39	44	38	34	25	26	32
<b>Rhondda Cynon Taff</b>	32	39	40	37	42	47	54	47	52	53	50	43	44
<b>Swansea</b>	26	38	40	51	54	61	64	72	65	47	35	29	47
<b>Torfaen</b>	25	40	46	43	-	49	-	56	55	-	48	37	43
<b>Vale of Glamorgan</b>	22	-	55	51	79	44	73	84	54	-	-	-	57
<b>Wrexham</b>	24	35	30	37	49	40	48	54	50	46	30	32	38

\* = small sample size; - = no returns received

## Appendix 4b - All Serviced Accommodation: Room Occupancy by Unitary Authority 2007 (%)

	2007 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
<b>Anglesey</b>	43	45	49	70	71	84	72	82	68	61	46	39	59
<b>Bridgend</b>	38	44	45	44	51	59	59	69	69	60	55	46	53
<b>Caerphilly</b>	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Cardiff</b>	63	86	82	64	86	88	85	76	91	89	96	83	81
<b>Carmarthenshire</b>	28	41	44	47	68	65	62	64	61	58	48	41	52
<b>Ceredigion</b>	23	43	41	47	55	59	60	69	53	44	34	23	45
<b>Conwy</b>	33	45	46	55	58	64	62	72	69	58	52	45	56
<b>Denbighshire</b>	37	44	43	45	52	55	53	56	53	48	44	39	48
<b>Flintshire</b>	38	43	38	50	46	47	45	67	37	33	40	33	42
<b>Gwynedd</b>	27	43	45	57	69	68	70	82	74	58	51	41	58
<b>Merthyr Tydfil</b>	37	43	74	35	48	49	46	-	-	-	-	-	47
<b>Monmouthshire</b>	34	41	51	63	63	63	64	68	65	62	47	45	55
<b>Neath &amp; Port Talbot</b>	33	49	50	50	60	49	49	42	59	50	42	26	46
<b>Newport</b>	58	72	71	62	68	69	79	63	80	78	76	59	68
<b>Pembrokeshire</b>	30	33	37	48	59	60	66	77	65	46	32	33	50
<b>Powys</b>	27	29	37	42	50	48	48	53	48	44	35	33	42
<b>Rhondda Cynon Taff</b>	49	55	54	48	57	64	69	57	73	76	71	56	60
<b>Swansea</b>	45	54	56	65	65	75	72	80	78	73	59	46	64
<b>Torfaen</b>	13	-	-	-	-	-	-	-	-	-	-	-	13
<b>Vale of Glamorgan</b>	29	-	73	65	79	57	88	92	64	-	-	-	71
<b>Wrexham</b>	42	53	47	55	74	58	71	68	72	72	54	47	57

\* = small sample size; - = no returns received