

***SELF-CATERING SURVEY  
IN WALES***

***2007***

***ANNUAL REPORT***

***TERMS OF CONTRACT***

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## **1. INTRODUCTION**

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### ***Background***

This report presents the main findings of the Visit Wales (VW) survey of tourism trends in holiday parks and self-catering independent operators during the 2007 season. The survey has been conducted in some form since 1987 in combination with monitoring visitor attractions and was until 2001 termed the *Wales Tourist Board Demand Monitor*. In 2001 the Survey ceased to monitor the attractions and has therefore since been known as the *Survey of Self-Catering Accommodation Occupancy*. Since 1987 Visit Wales have appointed Beaufort Research to conduct the survey on their behalf and this appointment now covers the period 2005-2007 (inclusive). Its purpose is to provide a measure of business levels during the peak and shoulder season, and the information is used:

- to assist Visit Wales in its efforts to develop and promote tourism;
- to provide survey participants with benchmark data about their performance over time, in absolute terms and by reference to a sample of their peers.

### ***Research Approach***

The survey has been conducted by Beaufort Research in accordance with the specification provided by the Visit Wales Research and Corporate Planning Department.

A detailed statement of the survey method appears in the Annex. In essence the survey involves a series of parallel monthly data collection exercises amongst samples of establishments, selected to be as representative as possible of the sectors in question. Participation in the survey is essentially voluntary and, although assiduous efforts are made to maintain response rates at a consistently high level, the number of returns received each month varies.

The sample is refreshed each year, using past participants as a core in order to maintain consistency over time. The success of any survey of this nature depends on the support and goodwill of the industry. Despite the best endeavours of Visit Wales and the contractor to ensure that samples remain representative of the industry at large, differential rates of response do occur and, in practice, there is probably a skew towards more progressive and efficient operators. Although the extent of any bias cannot easily be measured, readers need to be aware that it is likely to exist.

In 2001, in addition to ceasing to cover parallel trends amongst Welsh visitor attractions, the survey was extended to cover the whole year for the Self-Catering sectors and to April to October for the Parks Sectors. For this reason, graphs throughout the report include both an average for comparisons with previous years, consisting of May to October, and a year average, which is the total average occupancy for the whole period covered for that sector.

### ***Changes to Analysis***

In 2005 the decision was made to report levels of occupancy for self catering independent operators *only when a facility was available for hire*. 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 the individual operators. For example, closure of the facilities for maintenance could be classed as ‘unoccupied’ while reserving the facilities for friends and family could be classed as ‘occupied’. For this reason the inclusion of a question on the form about availability to the paying public now enables a more accurate collection of accommodation demand data.

This change was implemented from January 2006 onwards.

This alteration to the reporting methodology should be borne in mind when comparing 2006-7 results with those from previous years and direct comparisons should be treated with some caution.



Looking at the off-hire occupancy levels (above) for self-catering operators, there is a clear trend of availability in the core spring and summer months with non-availability peaking in January and February.

### ***The Reporting Cycle***

The purpose of the survey is to measure monthly levels of demand, although it is measured according to a four or five week cycle. Thus Bank Holidays and monthly reporting periods are not static from year to year, and on occasion, it is possible for Bank Holidays to “move” from one reporting period to another over seasons. This movement of Bank Holidays can lead either to artificial year on year differences being recorded or to real movements being masked. Movements of public holidays should be borne in mind when interpreting the data at a monthly level. In 2007, Easter fell in the April reporting period, the May Bank Holiday and the Spring Bank Holiday fell in the May reporting period, and the August Bank holiday fell in the August reporting period.

### ***The Report***

This report brings together all of the 2007 survey findings, accompanied by a technical explanation.

## 2. *SELF CATERING AGENCIES*

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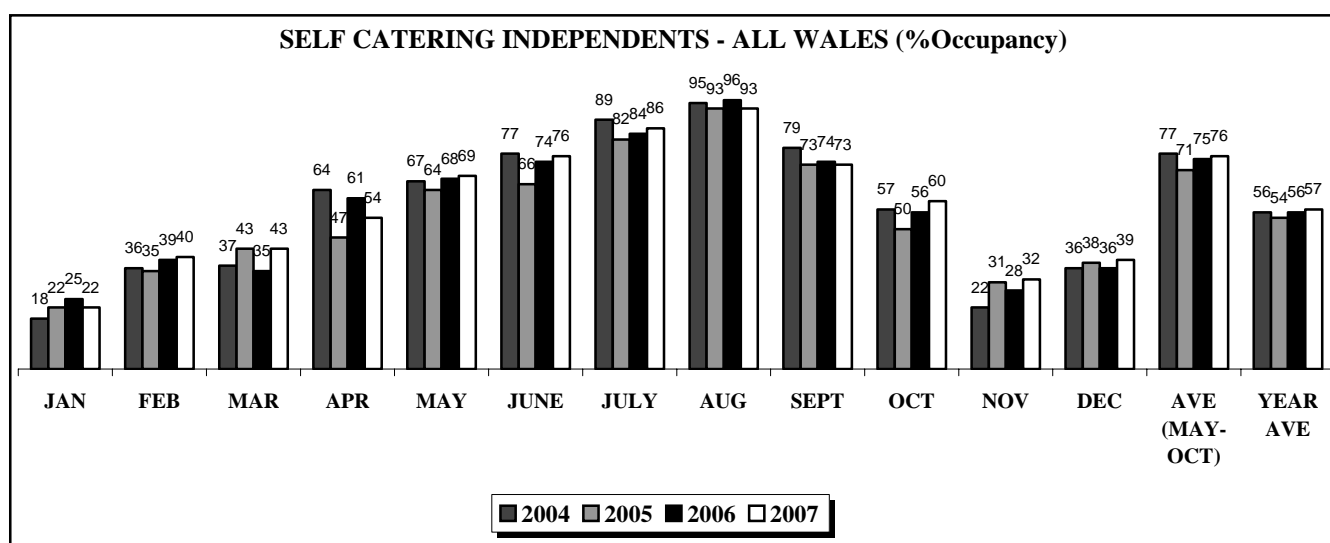
In 2007 there were several barriers that prevented Beaufort Research obtaining reliable samples of self-catering agencies (letting agencies offering self catering cottages and apartments in Wales). For this reason, it is not possible to report on findings from the self-catering agencies here.

### 3. SELF CATERING INDEPENDENT OPERATORS

This section summarises the information obtained from a sample of verified independent self-catering operators offering self-catering cottages and apartments in Wales. The sample was designed to be broadly representative of the range of furnished accommodation let through such independent 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 for rent.

#### Key Findings

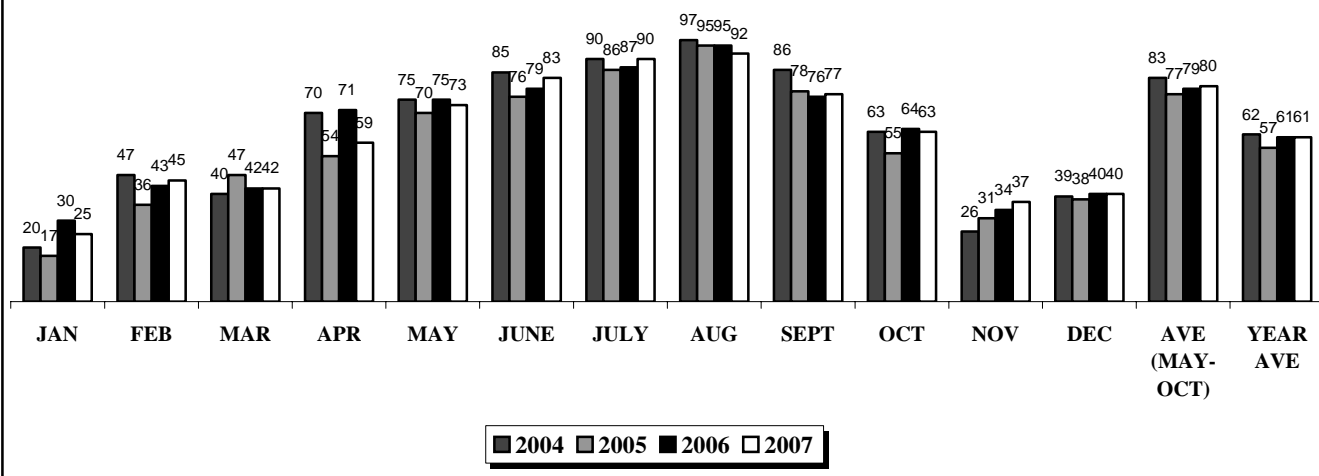
The 2007 yearly average occupancy rate is slightly above that of 2006. Levels of occupancy for April 2007 were actually lower than in 2006, although factors such as the weather may have some impact on these figures.



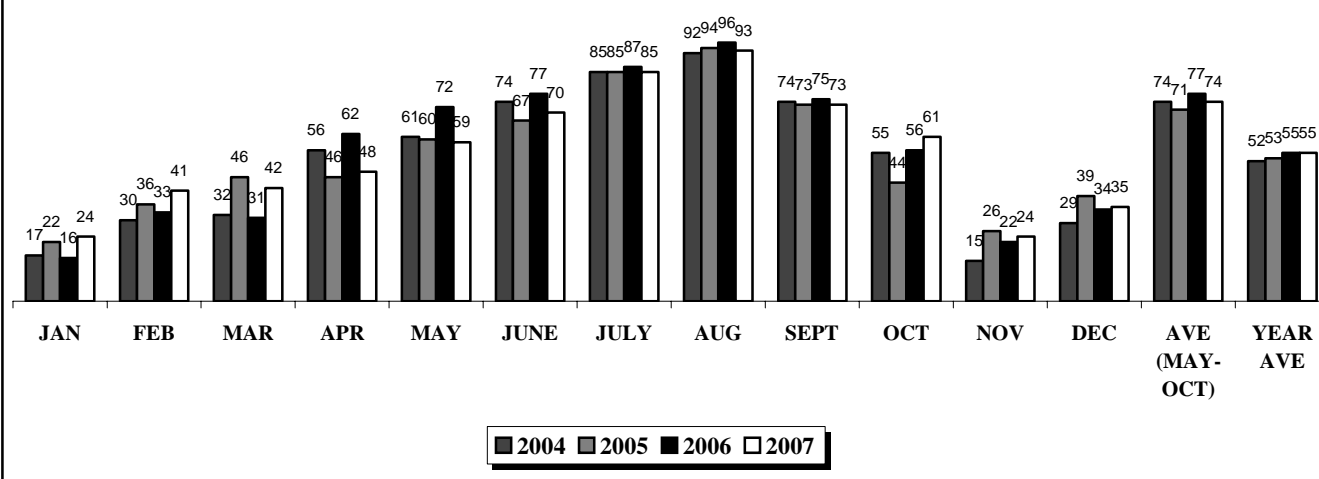
#### Regional Trends

In 2007 the average yearly occupancy is highest for North Wales (61%) and lowest for Mid Wales (55%). South Wales exhibits the greatest range in occupancy levels, from 19% occupancy in January reaching 94% in the core month of August. By comparison North Wales displays a narrower range of occupancy; the lowest level being 25% in January rising to 92% in August.

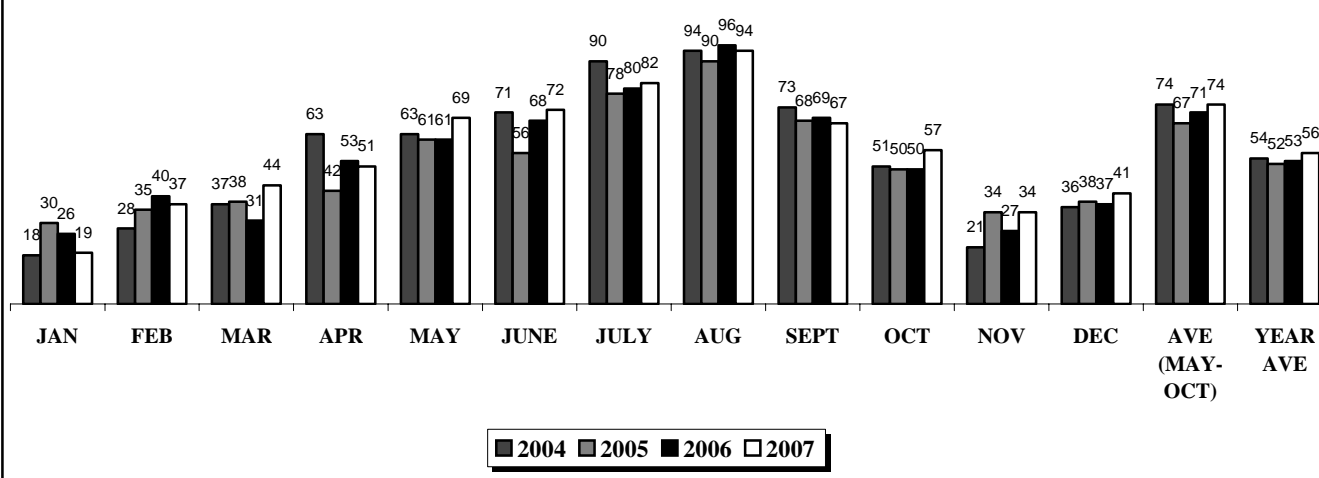
### SELF CATERING INDEPENDENTS - NORTH WALES



### SELF CATERING INDEPENDENTS - MID WALES

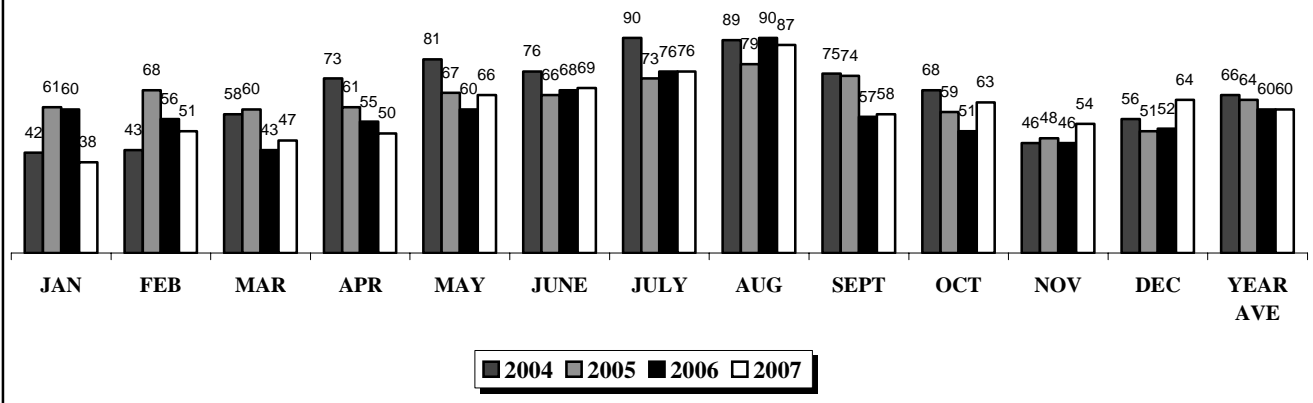


### SELF CATERING INDEPENDENTS - SOUTH WALES

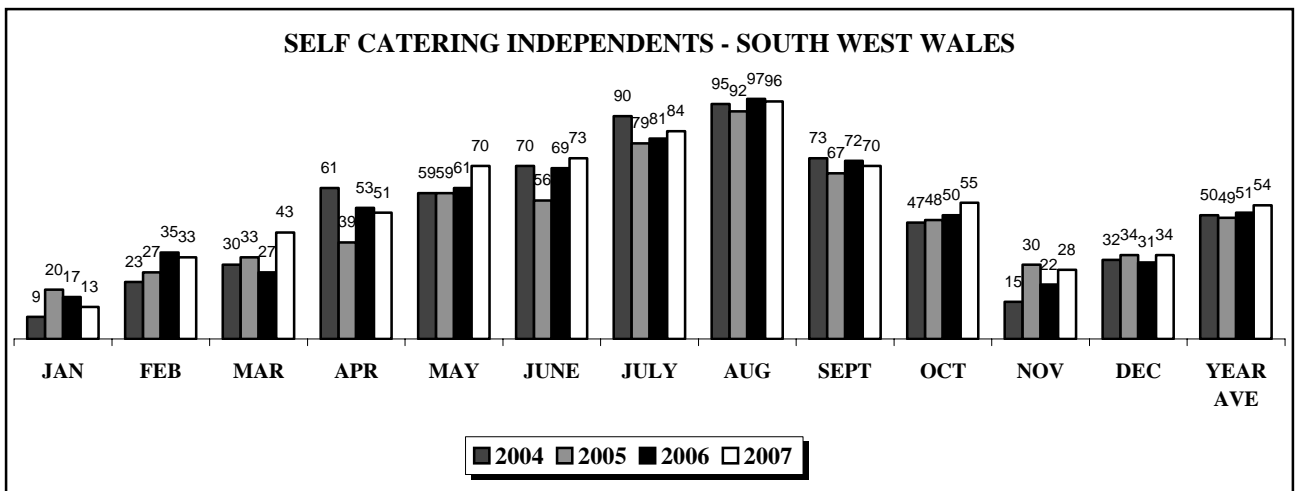




### SELF CATERING INDEPENDENTS - SOUTH EAST WALES



### SELF CATERING INDEPENDENTS - SOUTH WEST WALES



### *Coastal/Inland %*

Increasingly coastal locations are outperforming inland locations in terms of occupancy levels for self catering accommodation. In 2007 the May to October average for occupancy in a coastal location remained at 80%; a full ten percentage points above occupancy for inland self catering facilities.

#### Coastal Locations

	<i>Jan</i>	<i>Feb</i>	<i>March</i>	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>
<b>2007</b>	20	40	47	60	74	83	90
<b>2006</b>	25	38	31	63	73	81	90
<b>2005</b>	16	32	41	49	66	70	86
<b>2004</b>	14	36	33	65	68	79	91

	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Nov</i>	<i>Dec</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	95	78	62	29	36	80	60
<b>2006</b>	97	79	60	26	33	80	58
<b>2005</b>	93	78	52	32	37	74	54
<b>2004</b>	96	83	56	18	31	79	56

#### Inland Locations

	<i>Jan</i>	<i>Feb</i>	<i>March</i>	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>
<b>2007</b>	24	40	37	45	61	66	79
<b>2006</b>	24	42	40	59	61	61	75
<b>2005</b>	30	40	47	45	60	59	77
<b>2004</b>	24	35	41	62	67	74	85

	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Nov</i>	<i>Dec</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	91	65	56	38	44	70	54
<b>2006</b>	95	64	51	31	42	68	54
<b>2005</b>	92	63	47	28	40	66	52
<b>2004</b>	92	72	58	28	43	75	57

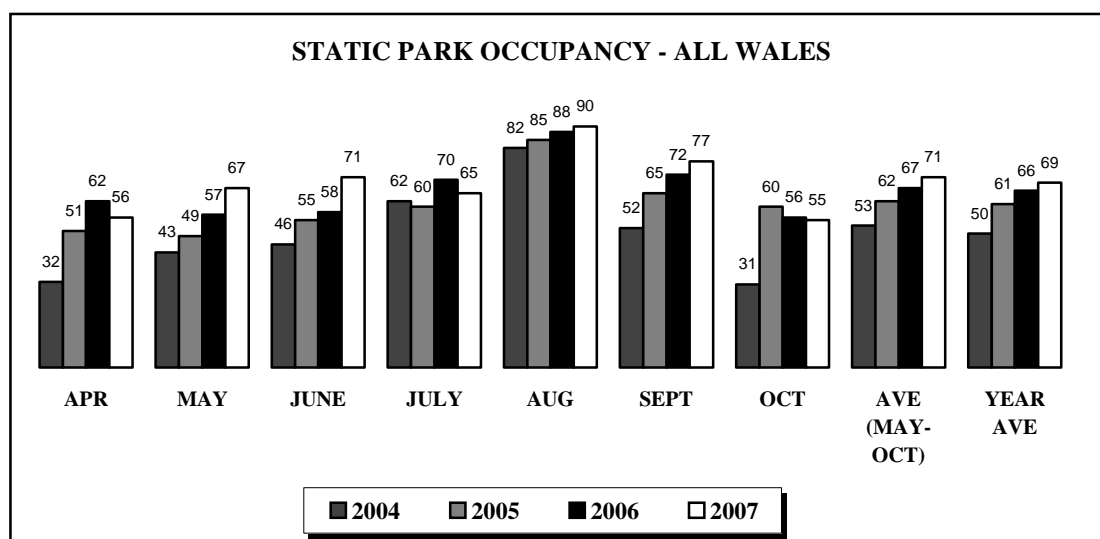
#### 4. *STATIC PARKS*

In this section we report on the information obtained 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.

##### *Key Findings*

Occupancy levels in 2007 for static parks have been slightly more erratic than in previous years although most months show a continued upward trend since 2004 with average occupancy across April to October now at 69%.

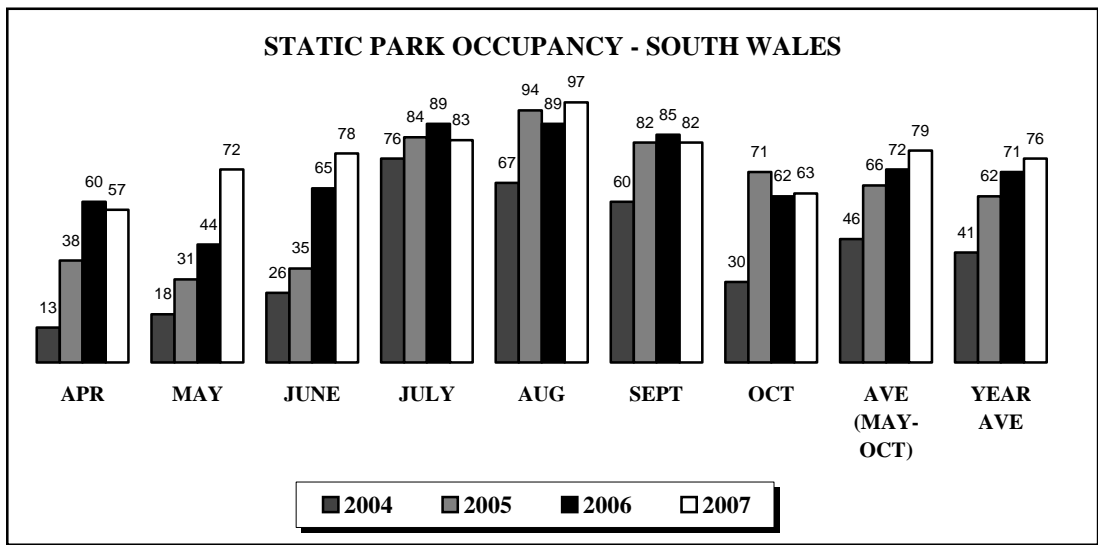
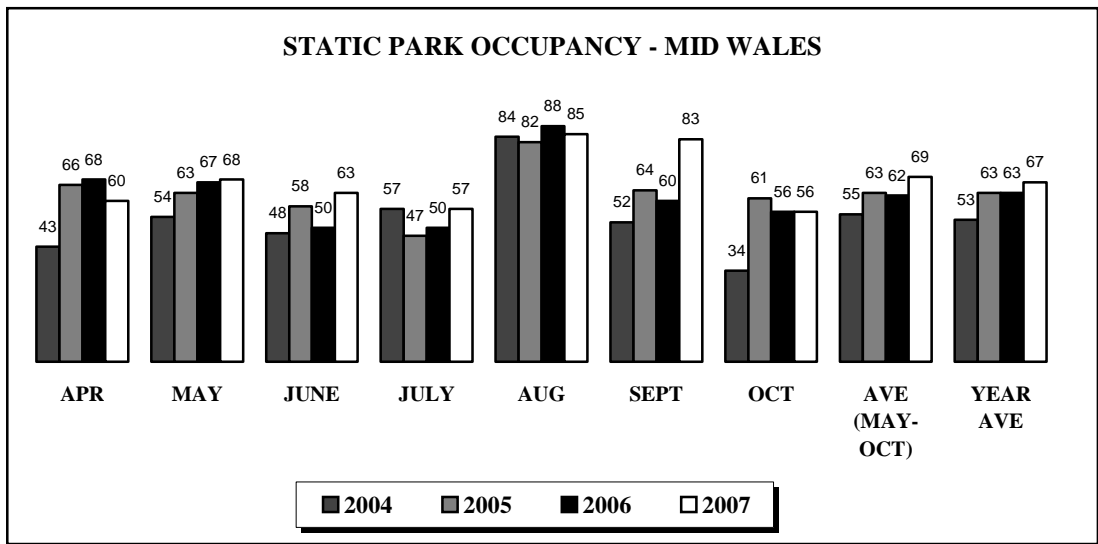
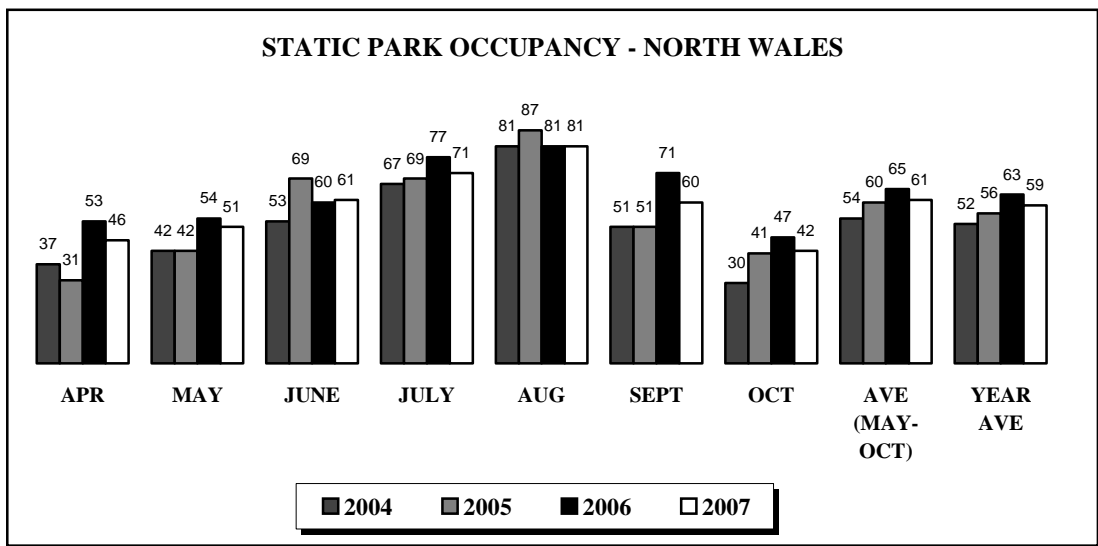
The most marked increase since last year occurs in the month of June with occupancy rising by 13 percentage points during this month.

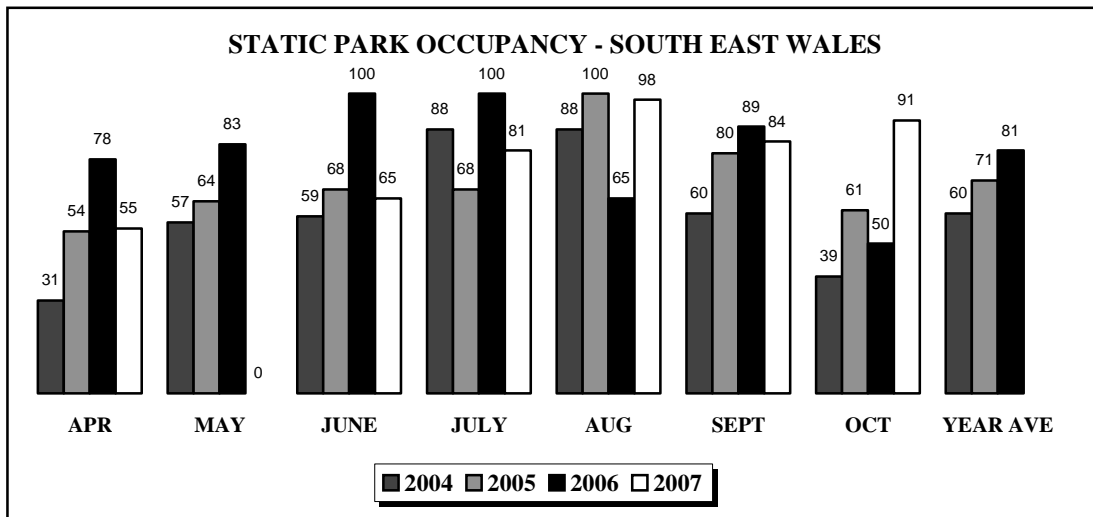


##### *Regional Trends*

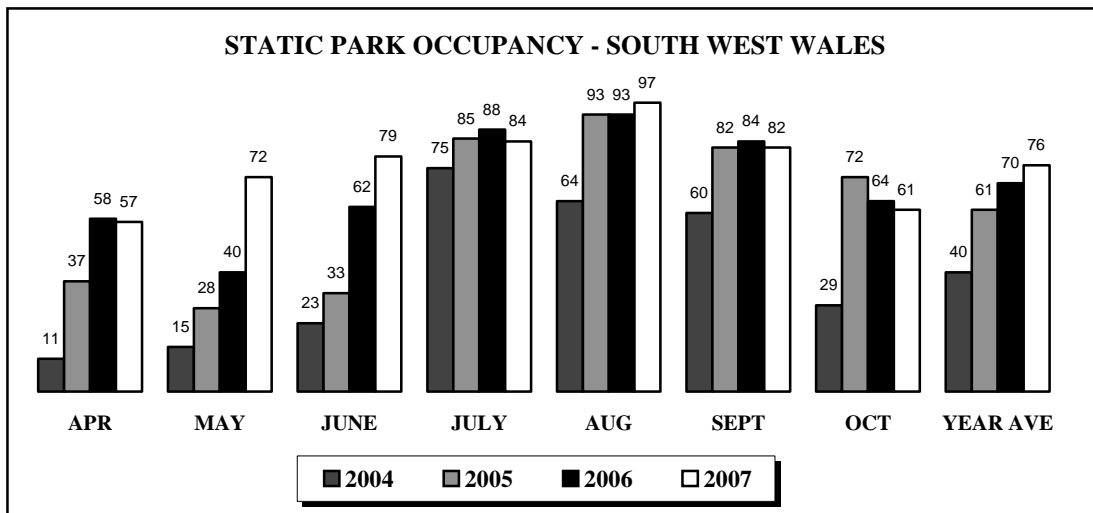
Occupancy levels in North Wales have slightly decreased since 2006, but are still above the average level of occupancy in 2004 and 2005. Levels in Mid & South Wales have increased since 2006.

The largest increases were seen in South Wales where the yearly average rose from 71% in 2006 to 76% in 2007. This increase in occupancy is most marked in the earlier months of the season; May and June.





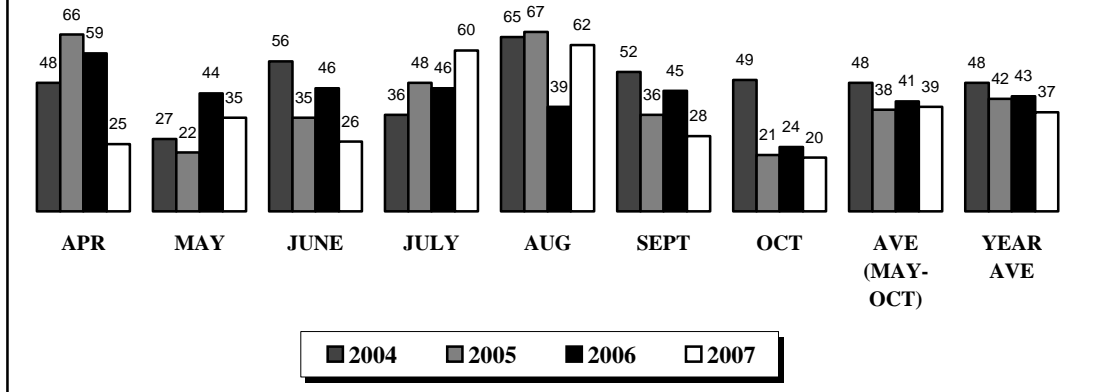
NB: No May returns for SE Wales in 2007, hence a year average has not been calculated.



### *The Family Market*

Occupation of static parks by families in 2007 has shown a slight decrease since the previous year, down 43% to 37%. The proportion of families at static parks during the key summer month of August has jumped considerably since last year, from 39% to 62%.

### STATIC PARK OCCUPANCY - FAMILIES



### ***Static Parks: Overseas Visitors %***

Overseas visitors accounted for 2% of the occupancy at static parks, 2% points lower than the 4% average over the last few years.

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	1	2	2	6	2	1	0	2	2
<b>2006</b>	2	6	3	2	1	8	6	4	4
<b>2005</b>	7	1	5	6	7	4	1	4	4
<b>2004</b>	1	1	7	2	9	4	1	4	4

### ***Static Parks: Inland/Coastal %***

Coastal static park locations continue their year on year increases in occupancy; up from 67% across the surveyed year in 2006 to 70% in 2007. Occupancy in coastal locations reached an all time high peak of 92% in August 2007. For inland locations occupancy for the surveyed year remained at a similar level since 2005, fluctuating around 54% to 56% across the three years.

#### **Coastal Locations %**

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	57	67	73	66	92	80	56	72	70
<b>2006</b>	62	57	58	70	90	73	58	68	67
<b>2005</b>	51	49	55	60	84	68	61	63	61
<b>2004</b>	32	44	46	63	83	53	32	54	50

#### **Inland Locations %**

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	50	59	49	62	73	44	43	55	54
<b>2006</b>	58	57	45	80	59	69	26	56	56
<b>2005</b>	36	46	52	58	93	54	48	59	55
<b>2004</b>	30	32	45	53	70	43	28	45	43

### ***Static Parks: Grading %***

Occupancy at 4-5 star static park sites continues to outperform occupancy at 1-3 star sites. Occupancy in 4-5 star sites between 2005 & 2007 has remained at a constant level of 76% while occupancy at 1-3 star sites has not changed since 2006 at 63%.

#### 1-3 Stars %

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	54	55	64	57	86	70	58	65	63
<b>2006</b>	61	52	51	65	88	71	56	64	63
<b>2005</b>	68	50	43	45	81	59	54	55	57
<b>2004</b>	23	46	43	62	90	56	29	54	50

#### 4-5 Stars %

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	59	74	80	83	95	81	61	79	76
<b>2006</b>	63	64	82	86	93	84	60	78	76
<b>2005</b>	52	69	82	85	97	78	66	80	76
<b>2004</b>	57	56	74	78	83	76	54	70	68

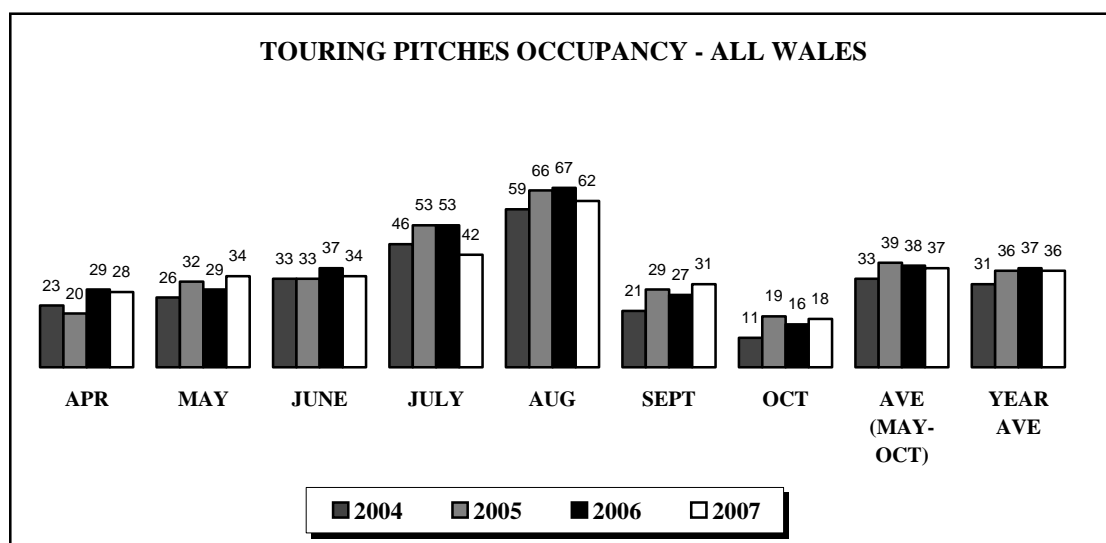


## 5. *TOURING PITCHES*

This component of the Occupancy Survey deals with parks offering touring caravan pitches. Although this sub-sector is dealt with separately for analysis purposes some of these parks will of course also offer static caravans for hire.

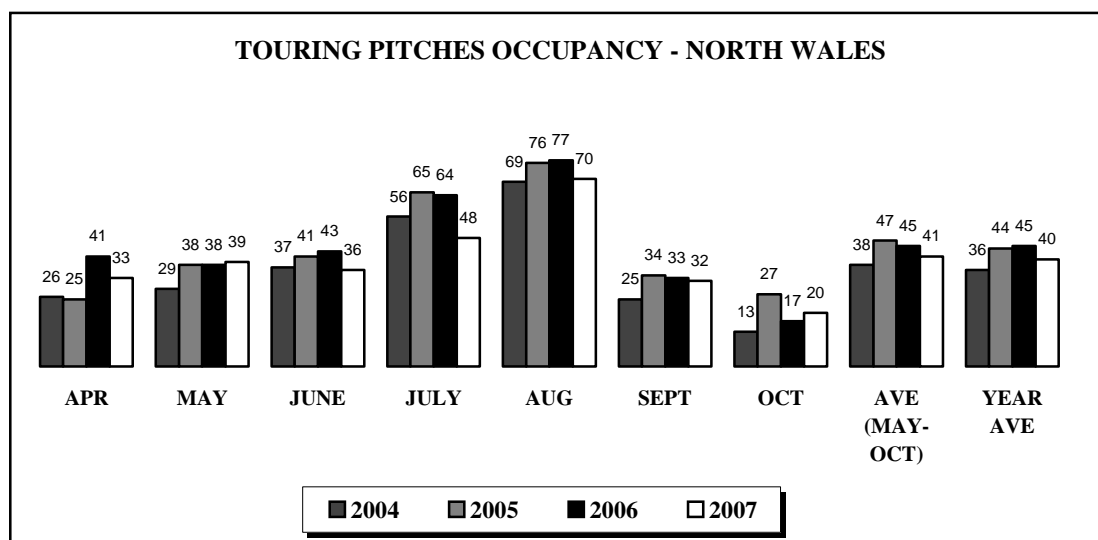
### *Key Findings*

Occupancy levels for touring pitches remained relatively consistent with 2006 occupancy levels with occupancy now at 36% across the touring park year compared to 37% in 2006.

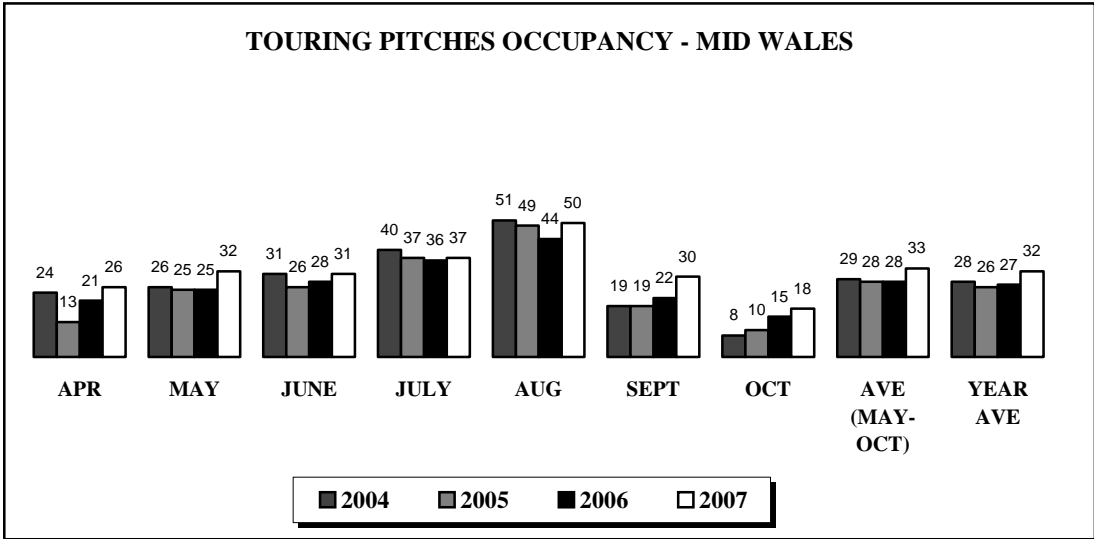


### *Regional Trends*

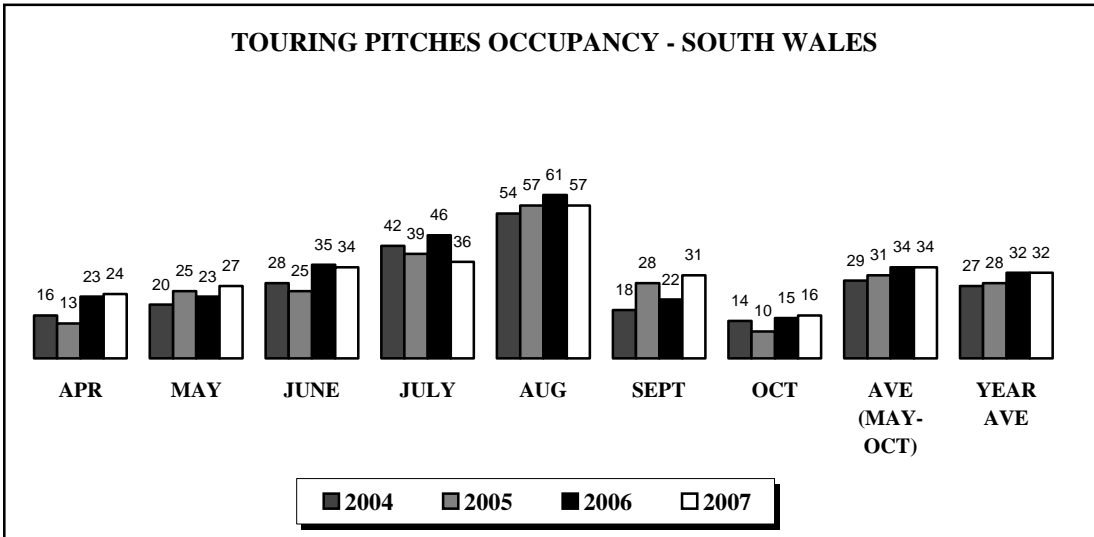
Occupancy levels in Mid Wales show the greatest increase since the previous year with occupancy now at almost a third (32%) – an increase of 5 percentage points since 2006.

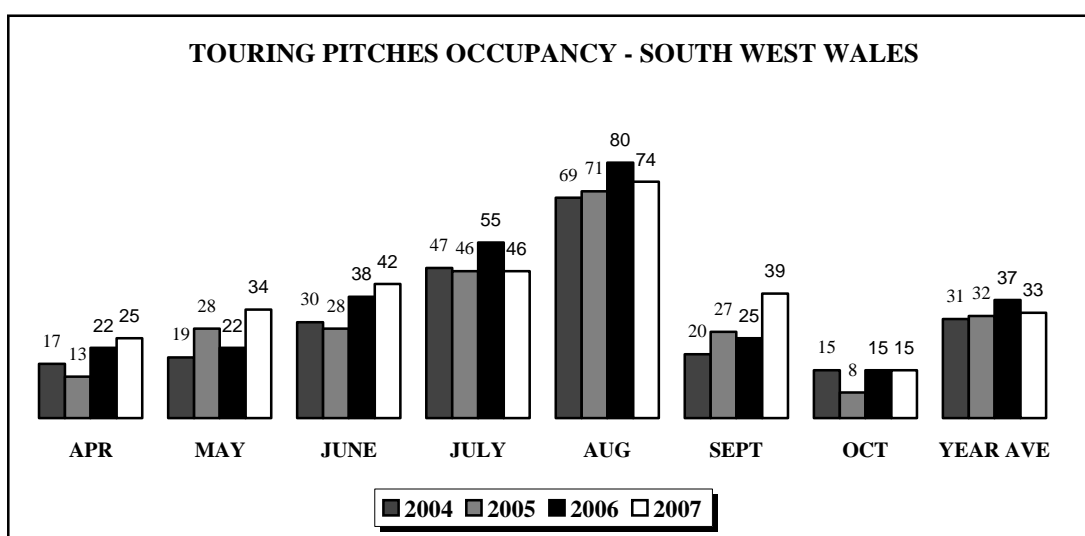
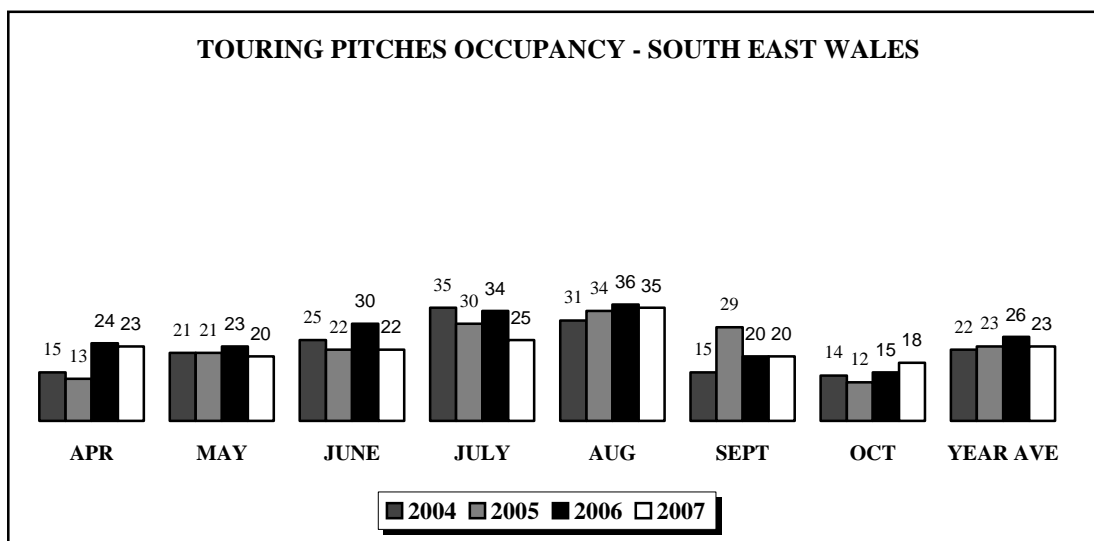


### TOURING PITCHES OCCUPANCY - MID WALES



### TOURING PITCHES OCCUPANCY - SOUTH WALES





***Touring Parks: Overseas Visitors %***

The proportion of overseas visitors to touring parks has dropped slightly since 2006 to 2% across the touring park year, but is consistent with 2004 & 2005 averages for the year.

	<i>Apr</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May–Oct)</i>	<i>Year Ave</i>
<b>2007</b>	1	2	4	4	3	2	1	3	2
<b>2006</b>	2	2	3	5	3	2	1	3	3
<b>2005</b>	1	2	3	3	2	1	0	2	2
<b>2004</b>	1	2	2	3	2	2	0	2	2

### ***Touring Parks: Inland/Coastal %***

As with static parks, touring parks in coastal locations continue to enjoy higher occupancy levels than their inland counterparts although the difference in occupancy levels is not so marked. In 2007 touring parks achieved 39% occupancy across the year in coastal locations compared to 31% in inland locations. In 2007, coastal location occupancy decreased by 2% since last year, the month of July showing the steepest drop from 61% in 2006 to 46% in 2007. However occupancy levels in inland areas increased by 3% from 2006.

#### Coastal Locations %

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	28	37	37	46	72	33	17	40	39
<b>2006</b>	32	32	40	61	76	29	15	42	41
<b>2005</b>	22	36	39	61	75	32	23	44	41
<b>2004</b>	22	26	33	52	66	22	11	35	33

#### Inland Locations %

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	28	29	30	34	45	28	21	31	31
<b>2006</b>	24	24	30	36	44	23	16	29	28
<b>2005</b>	14	24	25	35	52	25	11	29	27
<b>2004</b>	24	24	33	38	45	21	11	29	28

### ***Touring Parks: Grading %***

Occupancy levels in 1-3 star sites are slightly lower than in 2006 now at 33% compared to 37% last year. This is mainly due to drops in occupancy during the core months of July and August. 4-5 star sites saw a slight increase in yearly average occupancy for 2007, up 1% to 38%.

#### 1-3 Stars %

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	22	28	31	39	62	28	20	35	33
<b>2006</b>	26	28	37	48	65	26	27	39	37
<b>2005</b>	17	29	28	47	66	30	14	36	33
<b>2004</b>	19	25	34	47	56	22	19	34	32

#### 4-5 Stars %

	<i>April</i>	<i>May</i>	<i>June</i>	<i>July</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Average (May-Oct)</i>	<i>Year Ave</i>
<b>2007</b>	29	36	36	43	66	34	20	39	38
<b>2006</b>	31	29	37	54	68	28	14	38	37
<b>2005</b>	22	32	37	54	69	30	22	41	38
<b>2004</b>	25	27	33	47	63	21	9	33	32

## ***ANNEX 1: SURVEY METHODOLOGY***

Visit Wales has undertaken a range of monitoring exercises since the 1970s. Since 1987 they have commissioned Beaufort Research to conduct a monitoring survey amongst visitor attractions, self-catering agencies and holiday caravan/camping parks. The current methodology is based upon that employed in 2003.

### ***Sampling and recruitment***

The survey is based upon a series of separate enquiries among discrete samples chosen to be as representative as possible of the main sectors under review. Although the samples are refreshed each year, the survey specification provides for the contractor to seek to maintain as much continuity as possible over time, in the interests of consistency and the establishment of trends.

The main sectors covered are:

- Camping and caravan parks with static facilities
- Camping and caravan parks with touring facilities
- Self catering agencies
- Self catering independent operators

Samples were chosen and recruited in the following way at the start of the 2006 survey year:

- A sample of 69 caravan/camping parks was selected to form the database. All parks who formed part of the panel in 2006 and who were willing to participate in 2007 were sent letters and recruitment forms early in March, to complete details regarding their outlet. At this stage it was also established whether each co-operator required their correspondence and survey materials in Welsh or English. This was then logged onto our database and for the remainder of the season they would receive materials in the language of their choice. Replacement parks were selected onto the panel to replace those who no longer wished to participate.
- A sample of 161 verified independent self-catering operators were selected, again mainly those who had formed part of the panel in 2006. Replacements for those who no longer wished to take part were recruited by post, being sent self-completion forms at the end of December 2006 along with an explanatory letter about the survey and examples of outputs.

### *Data collection*

Information was obtained by means of monthly self-completion forms. Specimen copies are enclosed hereafter.

As emphasised earlier, participation in the survey is entirely voluntary. The samples analysed for each month differ according to how many usable returns were available at the time of panel closure. Details of the analysed samples each month are shown below:

### *Sample sizes (2007)*

	<i>Jan</i>	<i>Feb</i>	<i>Mar</i>	<i>Apr</i>	<i>May</i>	<i>Jun</i>	<i>Jul</i>	<i>Aug</i>	<i>Sep</i>	<i>Oct</i>	<i>Nov</i>	<i>Dec</i>
<i>S/C Independents</i>	154	141	150	143	156	157	153	153	151	147	130	134
<i>S/C Agencies</i>												
<i>Static Parks</i>	-	-	-	28	24	27	27	26	25	29	-	-
<i>Touring Pitches</i>	-	-	-	29	31	34	36	35	31	29	-	-

A reminder process is used in order to encourage higher response. A postal and telephone reminder is implemented for parks, a postal reminder for self-catering independents and a telephone reminder for self-catering agencies. In addition, all park sites returning a form are entered into a prize draw each month and all panel members are mailed a summary of their and the monitor's findings each month.

### *Time Period*

In the self-catering sector each period commences on a Saturday and finishes on a Friday. Thus, whilst analysis is described in calendar months terms the periods are not precisely so. The precise periods covered in 2007 were as follows:

<i>January</i>	6 <sup>th</sup> January	-	2 <sup>nd</sup> February
<i>February</i>	3 <sup>rd</sup> February	-	2 <sup>nd</sup> March
<i>March</i>	3 <sup>rd</sup> March	-	6 <sup>th</sup> April
<i>April</i>	7 <sup>th</sup> April	-	4 <sup>th</sup> May
<i>May</i>	5 <sup>th</sup> May	-	1 <sup>st</sup> June
<i>June</i>	2 <sup>nd</sup> June	-	6 <sup>th</sup> July
<i>July</i>	7 <sup>th</sup> July	-	3 <sup>rd</sup> August
<i>August</i>	4 <sup>th</sup> August	-	31 <sup>st</sup> August
<i>September</i>	1 <sup>st</sup> September	-	5 <sup>th</sup> October
<i>October</i>	6 <sup>th</sup> October	-	2 <sup>nd</sup> November
<i>November</i>	3 <sup>rd</sup> November	-	30 <sup>th</sup> November
<i>December</i>	1 <sup>st</sup> December	-	4 <sup>th</sup> January 2006

Monitoring encompasses five-week months in March, June, September and December.

For caravan/camping parks, the period covered is based on a calendar monthly basis thus allowing direct comparability with previous years data which has been re-worked (calculated) to encompass a calendar monthly period.

### *Analysis*

All analysis is undertaken at Beaufort's offices. All forms received are logged, checked and then entered onto a database for analysis. The following paragraphs highlight the main procedures: From 2003 use has been made of an analysis system commissioned by Visit Wales from a software consultancy called Rezolve.

**Caravan and Camping Parks:** No weighting is applied to the parks analysis. Returns for parks with static facilities and those with touring facilities are separately grouped into each reporting break and the required percentage calculated for each data sub set. It follows, therefore, that each park is analysed once within each of the reported groupings. The regions analysed are defined as follows:

*North:* Anglesey, Conwy, Denbighshire, Flintshire, Wrexham, Gwynedd  
North (Caernarvonshire)

*Mid:* Gwynedd South (Meirionydd), Ceredigion, Powys

*South East:* Bridgend, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Vale of Glamorgan, Cardiff, Newport, Monmouthshire

*South West:* Pembrokeshire, Carmarthenshire, Swansea, Neath & Port Talbot.

**Self-Catering Independents:** Returns for self-catering independents are reported in the form of weighted percentages. The weighting being on the basis of the number of units / properties each operator has available to let within Wales during the holiday season relative to the known universe.

The data is accumulated at total cell level and the weighting is applied. The data is then grouped into its relevant breaks (region / number of units available for let) and the required percentages are calculated for each break.

The regions analysed are defined as follows:

*North:* Anglesey, Conwy, Denbighshire, Flintshire, Wrexham, Gwynedd  
North (Caernarvonshire)

*Mid:* Gwynedd South (Meirionydd), Ceredigion, Powys

*South East:* Bridgend, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Vale of Glamorgan, Cardiff, Newport, Monmouthshire

*South West:* Pembrokeshire, Carmarthenshire, Swansea, Neath & Port Talbot



ANNEX 2: SPECIMEN COPIES OF QUESTIONNAIRES

Self-catering independent operators

OTHER INFORMATION	
Please insert the total number of days let to Overseas Visitors	Please insert the total number of days let to Families with children under 16

Please write in the total number of nights for which there were vacancies

PART WEEK LETS
Please specify total number of days let on a part weekly basis for units not let for a full week

FULL WEEK LETS
Please specify total number of units let on a Full Week basis

Please specify the number of units you had available to let for each week	
Oct 2 – Oct 8	
Oct 9 – Oct 15	
Oct 16 – Oct 22	
Oct 23 – Oct 29	
Oct 30 – November 5	



**BEAUFORT**  
R E S E A R C H

«OWNER»  
«NAME»  
«AD1»  
«AD2»  
«AD3»  
«AD4»  
«POSTCODE»

«PROFILE\_NUMBER»

*WTB TOURISM MONITOR*

**PARKS**

*Month 2007*

STRICTLY CONFIDENTIAL

**SECTION A**

**UNITS LET (BY NIGHT)**

PLEASE COMPLETE A SEPARATE ENTRY FOR EACH NIGHT OF THE MONTH SHOWING THE NUMBER OF UNITS LET. IF YOUR ESTABLISHMENT WAS CLOSED ON ANY DAY PLEASE WRITE 'CLOSED' IN THE RELEVANT BOX.

	Static		Touring	
	Caravans	Chalets	Caravans/ Trailers	Tents
1 <sup>st</sup>				
2 <sup>nd</sup>				
3 <sup>rd</sup>				
4 <sup>th</sup>				
5 <sup>th</sup>				
6 <sup>th</sup>				
7 <sup>th</sup>				
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26 <sup>th</sup>				
27 <sup>th</sup>				
28 <sup>th</sup>				
29 <sup>th</sup>				
30 <sup>th</sup>				
31 <sup>st</sup>				

**SECTION B**

**DETAILS OF TOTAL UNITS LET**

COULD YOU NOW PLEASE ANSWER THE FOLLOWING QUESTIONS.

**IF YOU DO NOT HOLD THIS INFORMATION PLEASE GIVE AN ESTIMATE. IF THE ANSWER IS ZERO PLEASE WRITE THIS IN.**

**Q1** What percentage of your total bookings / lets over this period were to overseas visitors (from countries other than England, Scotland, Wales and Northern Ireland)?

**WRITE IN BOX**  %

**Q2** What percentage of your total bookings / lets over this period were to adults with any children aged 0-15 years, as opposed to adults only?

**WRITE IN BOX**  %

Thank you very much for your help. The board appreciates your co-operation.

Please return this form in the Freepost envelope provided as soon as possible after the last day in the period. If you have lost your envelope send the form to:

**Beaufort Research**

**Freepost**

**Cardiff**

**CF10 1YS**

**NO STAMP IS NECESSARY**