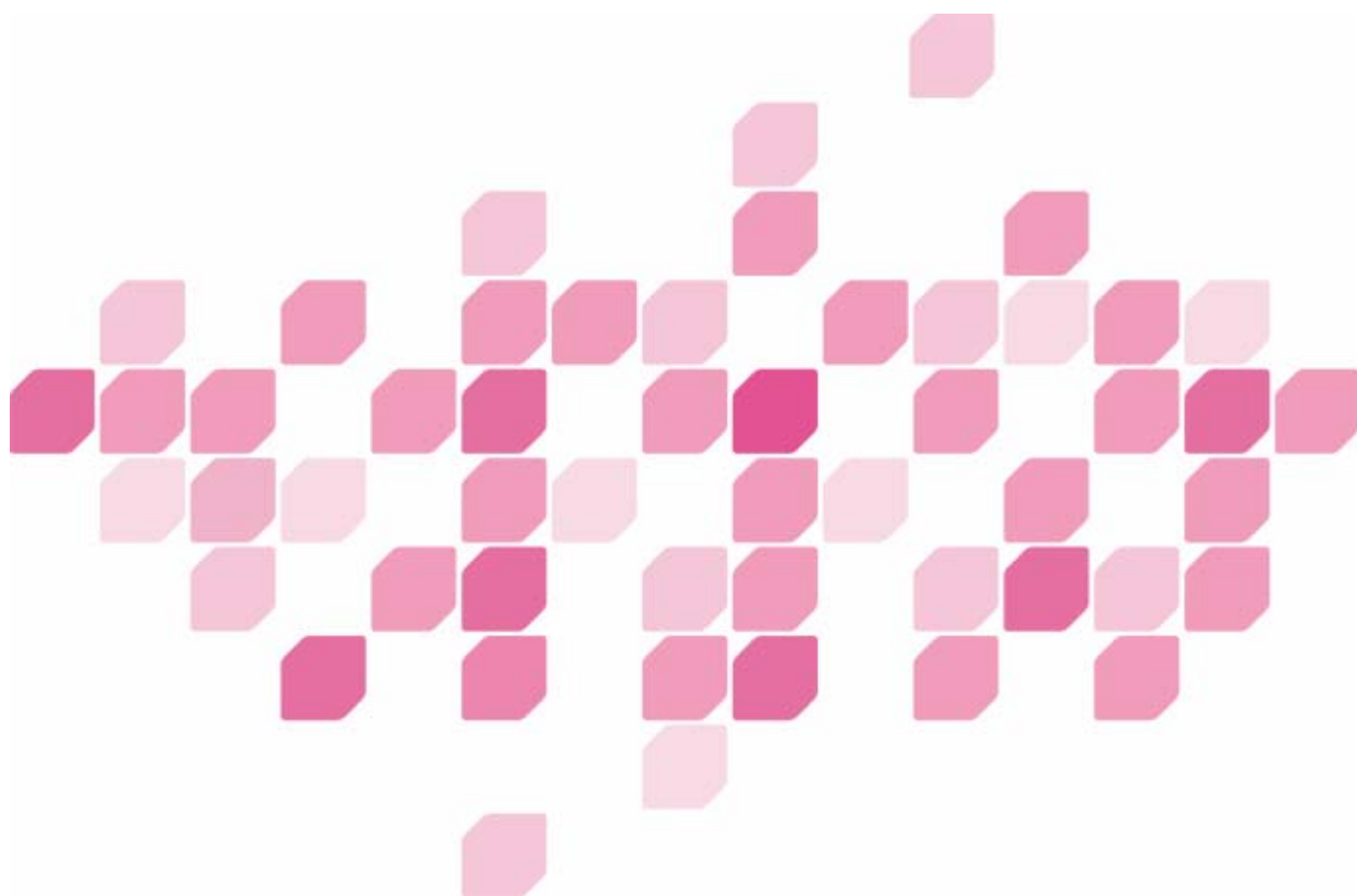


Wales Serviced Accommodation Occupancy Survey 2006

Final Report with Executive Summary

June 2007



Wales Accommodation Occupancy Survey 2006

Final Report

Visit Wales

June 2007

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Executive Summary

Introduction

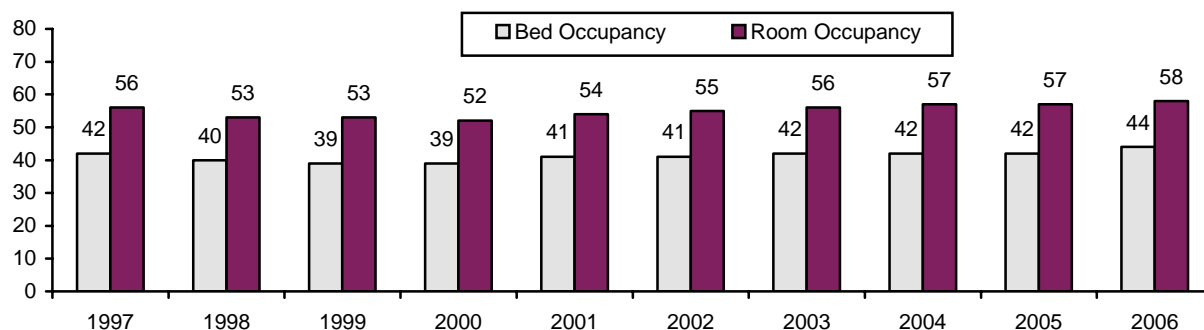
An occupancy survey has been continuously undertaken amongst graded hotel accommodation providers since 1972 to monitor levels of demand for hotel rooms and beds in Wales. To comply with the requirements of the EU Directive on Tourism Statistics, the survey was extended in 1997 to include all serviced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

This report presents the 2006 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 2006 were relatively consistent with those recorded in the past few years at 44% and 58% respectively.

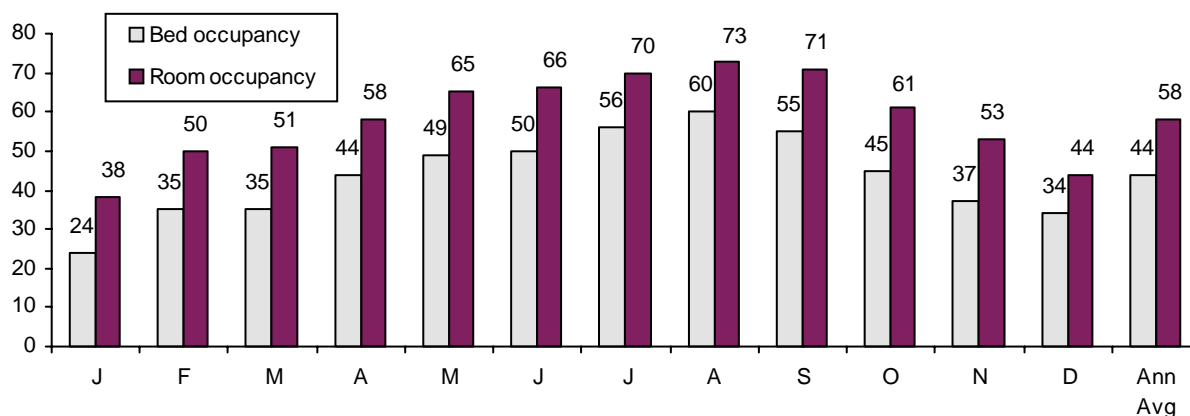
Figure B-1- Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The occupancy rates reflect the seasonality of the hotel sector with the average bed occupancy rate peaking during August (60%), having risen from 24% in January and falling to 34% in December. This variation is also evident in the average room occupancy figures which increased from 38% in January to 73% in August, before falling to 44% in December.

Figure B-2- Hotels - Monthly Bed & Room Occupancy – 2006 (%)

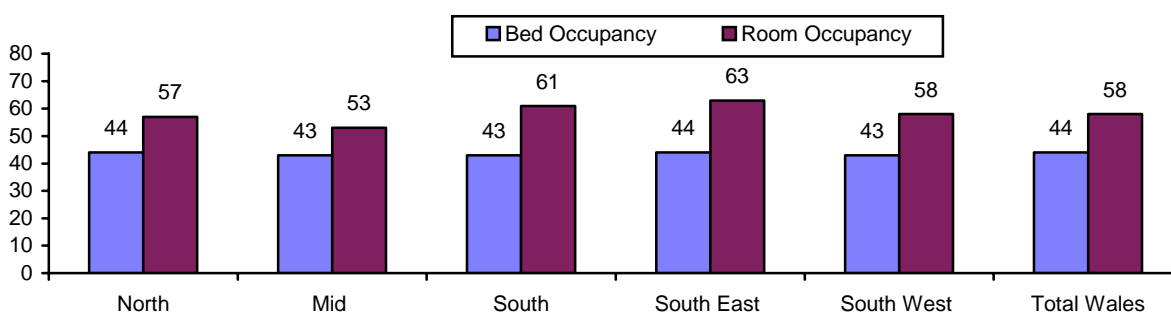


Occupancy Rates by Regions of Wales

Figure B-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 B-3 - Hotels - Annual Average by Regions of Wales – 2006 (%)



In 2006, consistent annual bed occupancy rates were recorded for the different regions in Wales with only a one percentage point difference variation between regions.

However, there was some variation in the annual room occupancy figures recorded for each region. As in 2005, establishments located in the South and South East recorded the highest room occupancy levels (63% and 61% respectively). South West Wales also recorded a relatively high occupancy level at 58%. North and Mid Wales recorded slightly lower occupancy levels at 57% and 53% respectively.

Percentage of Overseas Guests

As expected, overseas occupancy was highest during the main tourist season (May to September), with 5-6% recorded for overseas guests during these months. October also recorded a relatively high occupancy rate of 5%. As in 2005, the annual average proportion of overseas guests was 5%.

Occupancy by Size of Hotel

There is a positive relationship between the size of hotels and occupancy levels. Hotels with over 100 rooms recorded occupancy levels some 13-24 percentage points higher than the comparative figures for establishments with 4-10 rooms. As reported previously, there are a number of factors which could have contributed to this positive correlation. Larger hotels tend to be open all year and are more likely to actively market their establishments. Also, many of these are located in cities and large towns, making them more likely to have business guests occupying single rooms.

Occupancy by Tariff

There is a positive relationship between the tariff charged and occupancy levels for hotels charging between £20-£29.99 and £50-£59.99. However, unlike in 2005, when hotels charging over £60 recorded the highest levels of occupancy, in 2006 these establishments recorded occupancy levels slightly lower than the tariff banding of £50-£59.99 (1 percentage point less for both bed and room occupancy).

Occupancy by Location

In line with previous findings, the highest annual bed and room occupancy levels in 2006 were recorded by establishments located in cities and large towns (50% 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.

Occupancy by Grading

Non-graded establishments recorded lower occupancy levels than any of the establishments in the scheme. Within the scheme, occupancy levels for four star establishments recorded the

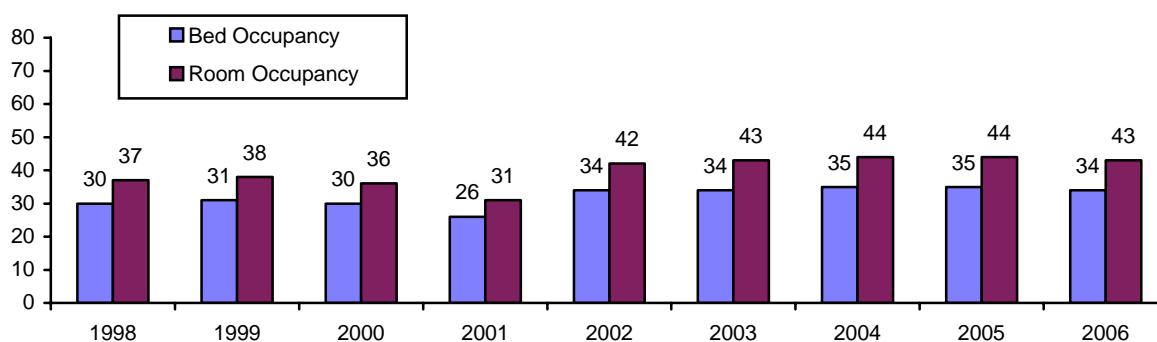
highest room occupancy levels while five star establishments recorded the highest bed occupancy levels. Bed and room occupancy levels in five star establishments have increased since 2005 but due to the small sample size of five star hotels these results should be treated with some degree of caution.

Guest Houses and Bed and Breakfasts

Annual Average Bed and Room Occupancy

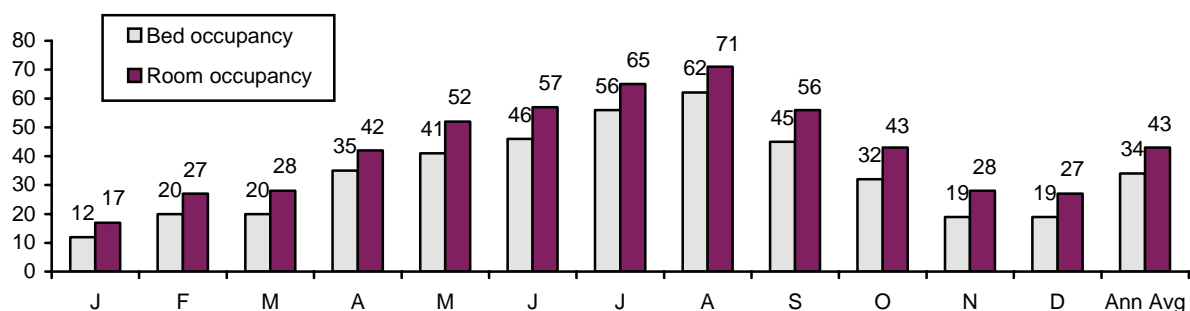
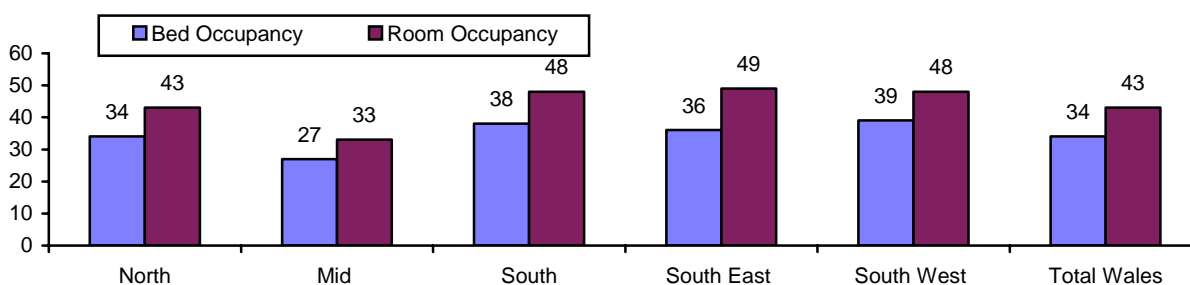
Overall, annual occupancy levels in 2006 were relatively consistent with those recorded in the last few years.

Figure C-2- Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

Highlighting the seasonality of this sector, the average bed occupancy rates were 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, peaked in August at 62% then fell to 19% in December. The annual average bed occupancy was 34%. Room occupancy levels followed a similar pattern and had an annual average of 43%.

Figure C-2- Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2006 (%)*Occupancy Rates by Regions of Wales***Figure C-3- Guest Houses/B&Bs - Annual Average by Regions of Wales – 2006 (%)**

The annual bed and room occupancy levels were highest in the South, with relatively consistent occupancy rates being recorded for both South East and South West. In contrast, occupancy levels for Mid Wales occupancy were notably lower, recording 27% for bed occupancy and 33% for room occupancy.

The greatest difference between the annual bed and room occupancy rates recorded in 2006 was recorded by 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

Overseas occupancy reached a maximum during the peak summer month of July (16%) and was lowest during February when a rate of 6% was recorded. The annual average percentage of overseas guests in guest houses and bed and breakfast establishments in 2006 mirrored that recorded in 2005 at 13%.

Occupancy by Size of Guest House/Bed & Breakfast

Similar to the hotel sector and as reported previously, there would appear to be a positive relationship with the size of establishments with both the annual bed and room occupancy rates higher (9 and 10 percentage points respectively) in the larger establishments. 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 more likely to be actively involved in the marketing of the establishment.

Occupancy by Tariff

Despite a small decrease in both 2005 and 2006, the annual room occupancy rates for establishments charging £20-29.99 have remained relatively consistent over the last five years. However, establishments charging £30-39.99 recorded a 4 percentage point decrease comparative to 2005. The sample size for establishments charging under £20 was too small to illustrate.

Occupancy by Location

Occupancy levels for establishments in cities and large towns were notably higher than those located in small towns or rural areas. However, due to the relatively small sample size these results should be interpreted with some degree of caution. As in 2005, the second highest rates in 2006 were recorded by establishments located in seaside areas with annual bed and room occupancy rates were 39% and 47% respectively.

In 2006, establishments in cities and large towns recorded a 3 percentage point increase comparative to 2005, with the other locations remaining consistent with the levels recorded in 2005.

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 2005, graded establishments had higher bed and room occupancy levels than those with no grading.

The annual room occupancy rates in 2006 for non graded, 3 and 4 star establishments were consistent with those recorded in 2005. However, 1 and 2 star graded establishments experienced a decrease in their room occupancy levels of 3 and 4 percentage points respectively.

All Accommodation

In 2006, both the annual bed and room occupancy levels 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 61% and 73% respectively in August.

The proportion of overseas guests was very consistent with those recorded since 2003 with only the months of March, April, June, July and October recording small changes in occupancy levels compared to 2005. Reflecting these results, the overall average in 2006 was the same as in years 2003 – 2005 (6%) but lower than the comparative figures recorded in 2002.

A. 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 2006 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. A copy 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 guest 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.

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

B. Hotels

Sample Size

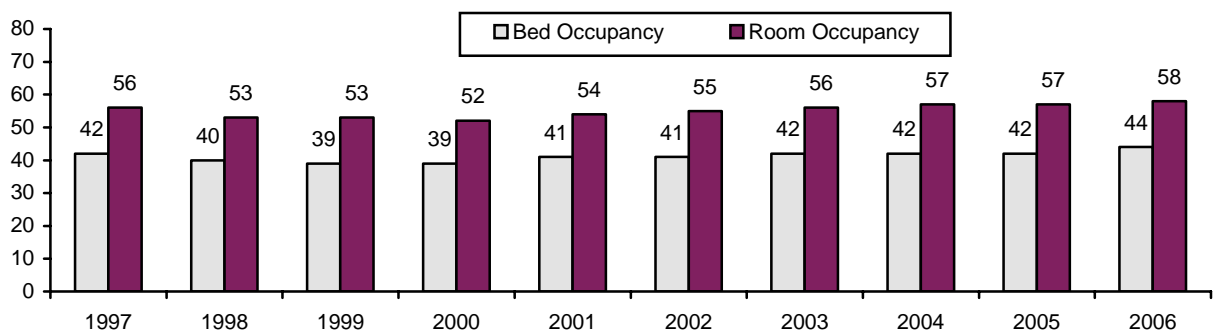
In 2006, a total of 144 hotels participated in the survey (i.e. provided at least one return during the year). To ensure that the results are comparable across the months, a great deal of effort was placed on trying to maintain the level of response each month and operators have been encouraged to provide a full response over the year. Just under two-thirds (64%) of the operators who contributed to the survey provided data for every month of the year. A further 9% provided data for all but one month of the year.

During this period, 1 hotel was recruited to take part in the survey. However, in the same period 16 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 2006 were relatively consistent with those recorded in the past few years at 44% and 58% respectively. However, in 2006 occupancy rates were the highest recorded in the last ten years.

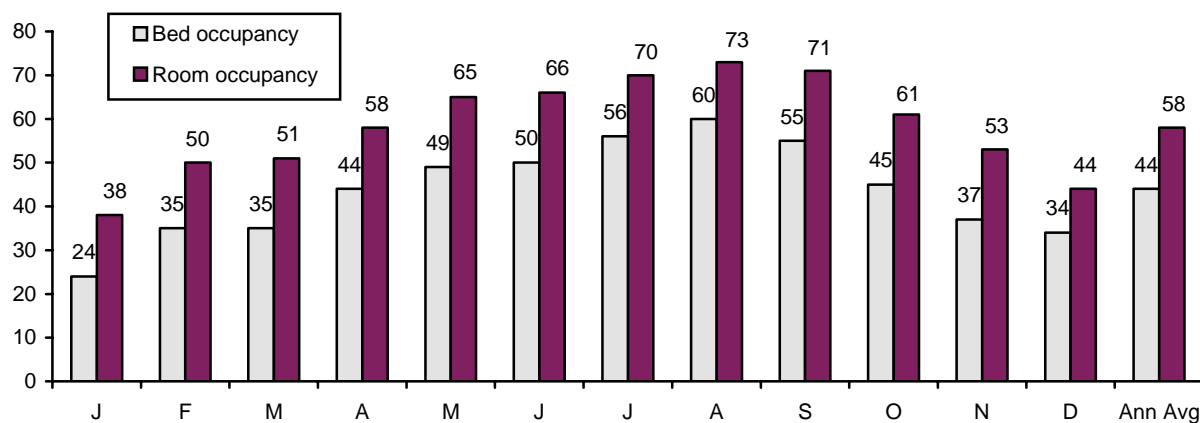
Figure B-1- Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2006 are presented in Figure B-2 below.

Figure B-2- Hotels - Monthly Bed & Room Occupancy – 2006 (%)



The occupancy rates reflect the seasonality of the hotel sector with the average bed occupancy rate peaking during August (60%), having risen from 24% in January and falling to 34% in December. This variation is also evident in the average room occupancy figures which increased from 38% in January to 73% in August, before falling to 44% in December.

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

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

In 2006, room occupancy rates increased for every month except for January (a fall of 2% comparative to 2005) and March (a fall of 1%), recording their highest room occupancy levels in the past nine years.

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

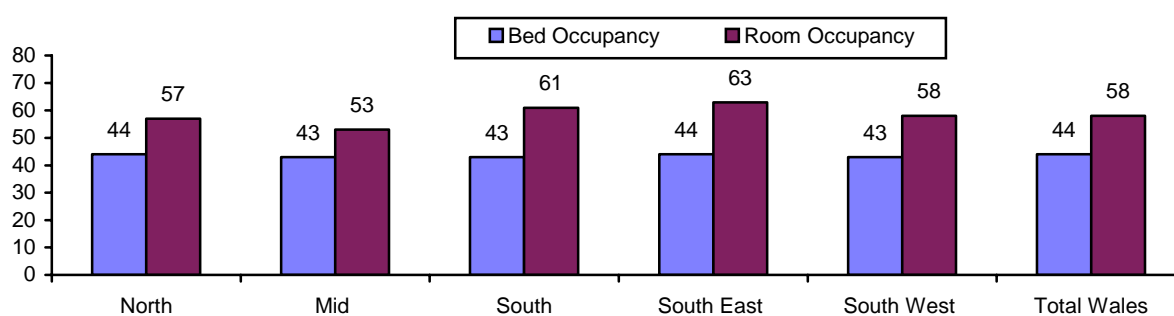
Occupancy Rates by Regions of Wales

Figure B-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 B-3 - Hotels - Annual Average by Regions of Wales – 2006 (%)



In 2006, consistent annual bed occupancy rates were recorded for the different regions in Wales with only a one percentage point difference variation between regions.

However, there was some variation in the annual room occupancy figures recorded for each region. As in 2005, establishments located in the South and South East recorded the highest room occupancy levels (63% and 61% respectively). South West Wales also recorded a relatively high occupancy level at 58%. North and Mid Wales recorded slightly lower occupancy levels at 57% and 53% respectively.

Bed and room occupancy levels for each region on a monthly basis for 2006 are presented in Appendix 2b and 2c. Bed and room occupancy levels by unitary authority area are 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 B-2.

Room occupancy rates across all regions were consistent with those recorded in 2005. In particular, the South East and North recorded an increase of 3 and 2 percentage points comparative to 2005.

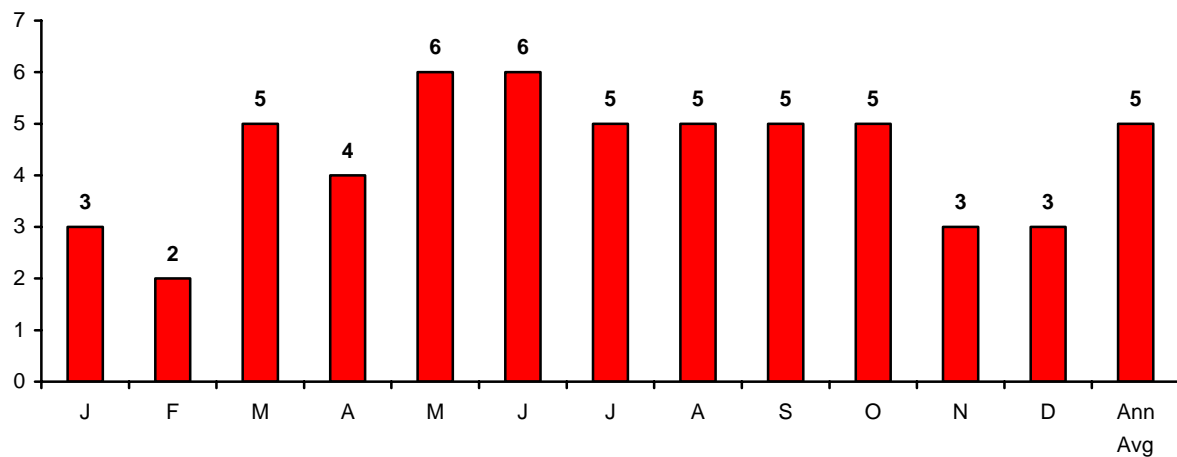
Table B-2- Hotels - Trends in Room Occupancy Rates by Regions of Wales (%)

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

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 B-4- Hotels - Percentage of Overseas Guests 2006 (%)



As expected, overseas occupancy was highest during the main tourist season (May to September), with 5-6% recorded for overseas guests during these months. October also recorded a relatively high occupancy rate of 5%. As in 2005, the annual average proportion of overseas guests was 5%.

Trends in Percentage of Overseas Guests

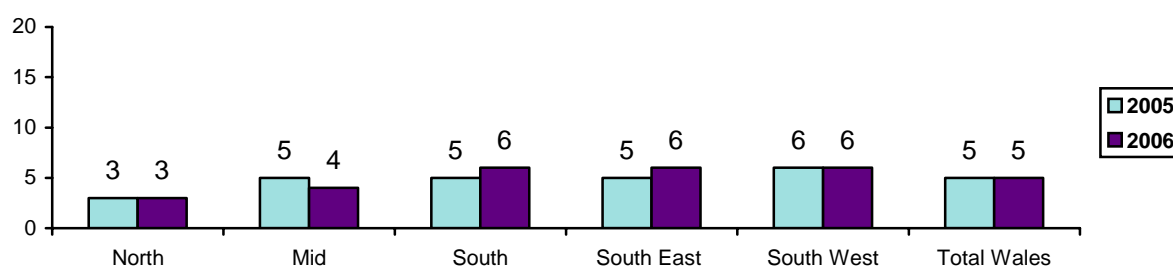
The percentage of guests in 2006, as illustrated in Table B-3, remained consistent with the previous three years at 5%. As reported last year, the proportion of overseas guests has been decreasing in the past nine years from 10% in 1998.

As illustrated in Table B-3 below, the percentage of overseas guests in 2006 was consistent with that recorded since 2003 at 5%. As stated in the 2005 report, the proportion of overseas guests has been decreasing for the past nine years with the average falling from 10% in 1998.

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

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

Figure B-5- Hotels - Percentage of Overseas Guests by Region 2006 (%) vs 2005 (%)

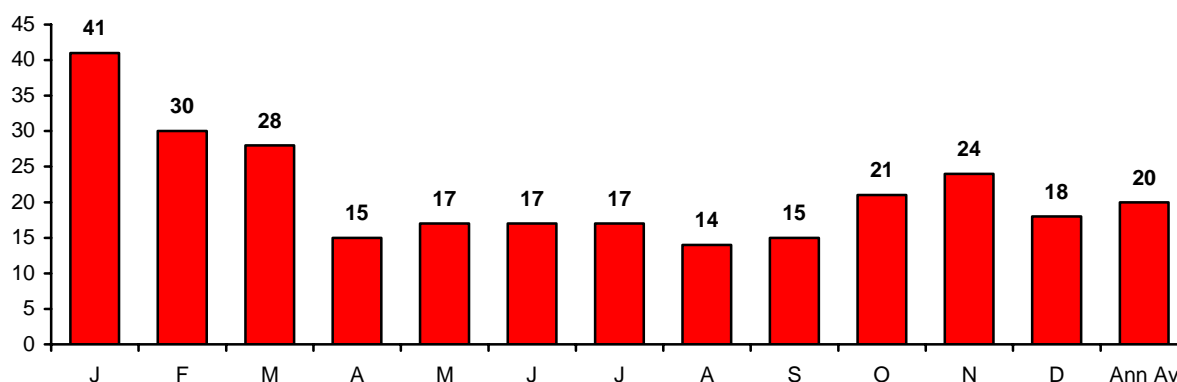


The proportion of overseas guests was highest in the South, South West and South East regions of Wales at 6% and lowest in the North of Wales (3%). The South and South East all recorded a small increase comparative to 2005. However, Mid Wales recorded a 1 percentage point fall over the same time period to 4%.

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 B-6– Hotels - Percentage of Business Guests 2006 (%)

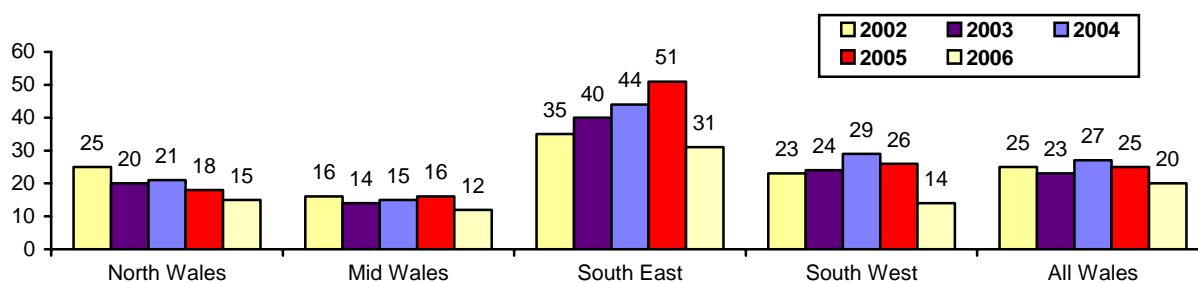


Contrasting to overall occupancy levels, the percentage of business guests was highest at the start and end of the year. In January the proportion of business guests was 41%, which dropped to 14% in August, before rising again to 24% in November. The annual average proportion of business guests was 20%, a decrease of 5% from 2005. April saw the biggest decrease comparative to 2005, down 11% to 15%. This is most likely the result of the Easter holiday period falling in April in 2006 and March in 2005. Overall, with the exception of August (which recorded the same occupancy rates as 2005 at 14%), each month showed a decrease comparative to 2005.

Table B-4 Trends in Percentage of Business Guests

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

As reported in previous years, the proportion of business guests is significantly higher in the South East of Wales compared to other regions, with a difference of between 16 and 19 percentage points compared to other regions. This is perhaps no surprise given that the South East region encompasses the city of Cardiff. However, this region recorded a significant 20% decrease comparative to 2005. The other regions all recorded a decrease in the overall percentage of business guests comparative to 2005 (between 3 and 14 percentage points), which resulted in the overall occupancy rate falling from 25% in 2005 to 20% in 2006. However, these figures should be viewed with caution due to the low sample sizes for 2005 (sample size = 106) and 2006 (sample size = 80).

Figure B-7—Hotels – Annual Average Percentage of Business Guests by Region 2002 - 2006

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 2006 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 B-8- Annual Occupancy by Size of Hotel - 2006 (%)

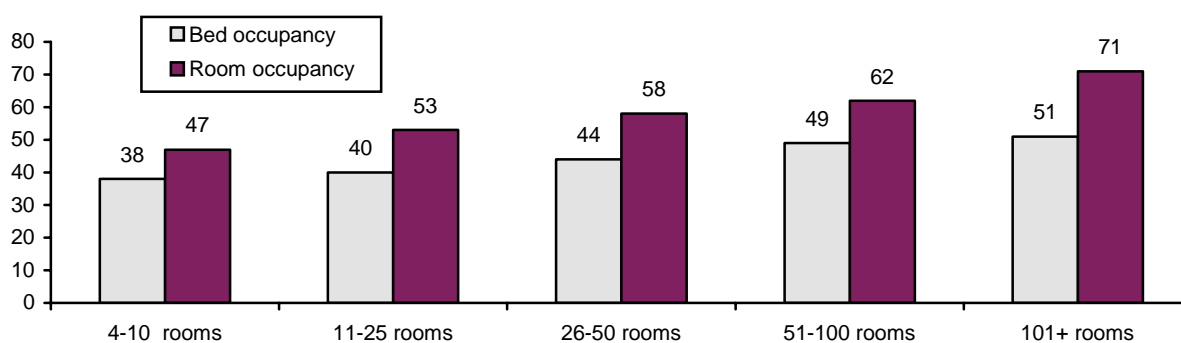


Figure B-8 illustrates that there is a positive relationship between the size of hotels and occupancy levels. Hotels with over 100 rooms recorded occupancy levels some 13-24 percentage points higher than the comparative figures for establishments with 4-10 rooms. As reported previously, there are a number of factors which could have contributed to this positive correlation. Larger hotels tend to be open all year and are more likely to actively market their establishments. Also, many of these are located in cities and large towns, making them more likely to have business guests occupying single rooms.

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

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

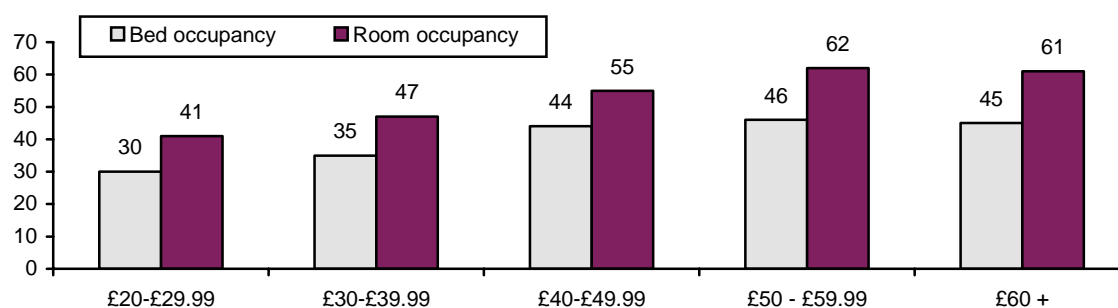
The trend for occupancy levels to increase as the size of the hotel increase has been evident over the last nine years. After recording a fall in occupancy levels in 2005, hotels with 51-100 rooms recorded a small increase from 2005 to 2006 of 2 percentage points. Establishments which fall into the other size categories recorded their highest occupancy levels in the last nine years.

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.

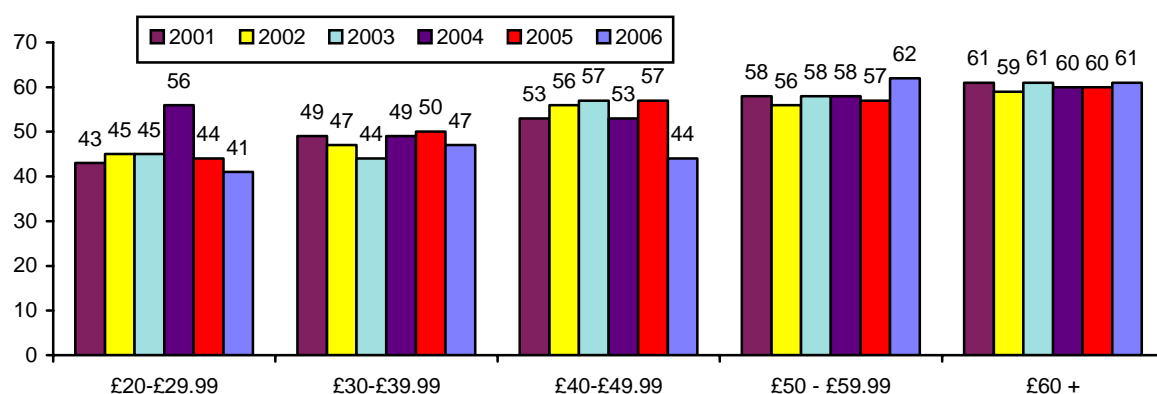
Figure B-9 below presents annual bed and room occupancy figures by tariff for 2006. Due to the small sample size there is no analysis for hotels with a tariff of less than £20.

Figure B-9- Annual Occupancy by Tariff of Hotel – 2006 (%)



There is a positive relationship between the tariff charged and occupancy levels for hotels charging between £20-£29.99 and £50-£59.99. However, unlike in 2005, when hotels charging over £60 recorded the highest levels of occupancy, in 2006 these establishments recorded occupancy levels slightly lower than the tariff banding of £50-£59.99 (1 percentage point less for both bed and room occupancy).

Figure B-10 overleaf shows the annual average room occupancy rates by tariff for 2001 - 2006.

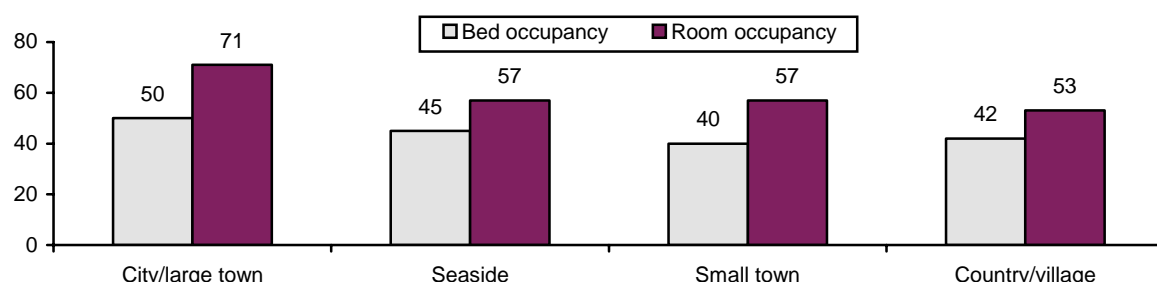
Figure B-10- Trends in Annual Room Occupancy Rates by Tariff of Hotel (%)

Hotels charging between £40 and £49.99 have experienced a 13 percentage point decrease in their annual room occupancy rates between 2005 and 2006, the lowest recorded occupancy level for this tariff band in the last six years. Hotels charging £50 to £59.99 recorded a 5 percentage point increase between 2005 and 2006, the highest level recorded in the last six years.

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 B-11 below.

Figure B-11- Annual Occupancy by Location of Hotel - 2006 (%)

In line with previous findings, the highest annual bed and room occupancy levels in 2006 were recorded by establishments located in cities and large towns (50% 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.

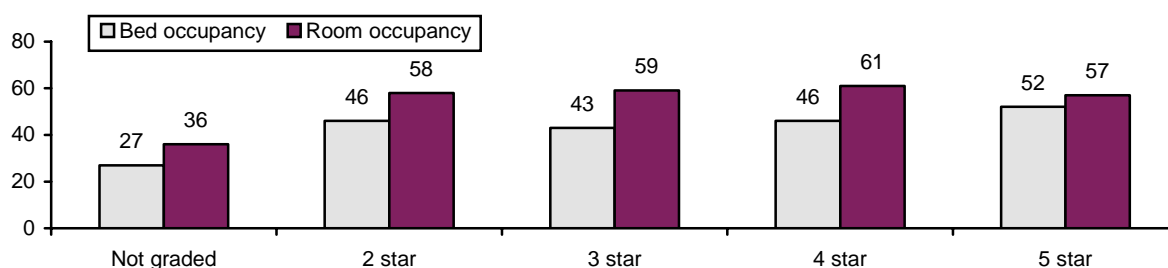
Table B-6- Trends in Annual Room Occupancy Rates by Location of Hotel (%)

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

Room occupancy rates across most locations have remained relatively constant during the 1998-2006 timescale, with any differences typically only a few percentage points. Perhaps the one exception is establishments located in small towns which have increased since 2002 and in 2006 were at their highest levels in the past nine years. Hotels in cities/large towns also recorded a rise in room occupancy rates of 4% between 2005 and 2006, the highest recorded figure since 2003.

Occupancy by Grading

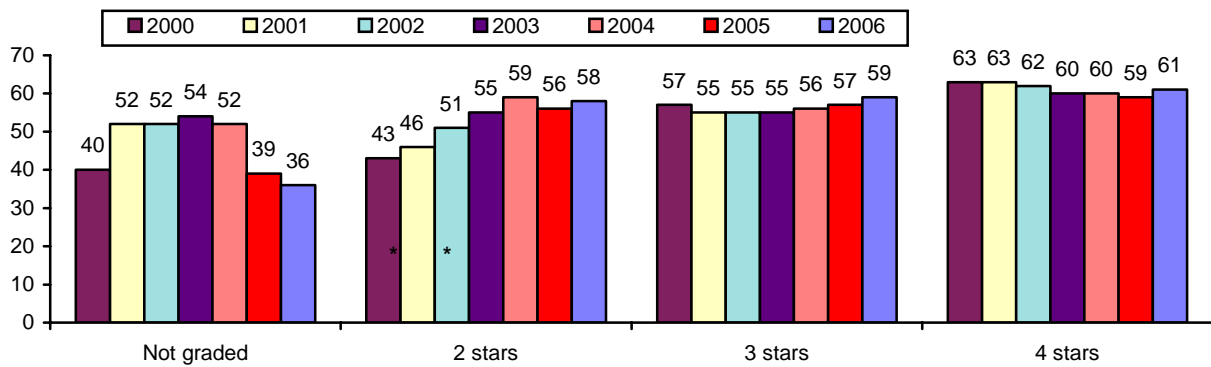
Since 1999, occupancy rates for hotels are also analysed according to their grading under the Star Grading Scheme administered by Visit Wales (formerly Wales Tourist Board). On this basis, there are no comparable figures available prior to 1999. Due to the small sample sizes involved, there is no analysis for establishments graded 1 star. Those establishments not graded within the Visit Wales grading scheme may be graded within other existing grading schemes.

Figure B-12- Annual Occupancy by Grading of Hotel – 2006 (%)

Non-graded establishments recorded lower occupancy levels than any of the establishments in the scheme. Within the scheme, occupancy levels for four star establishments recorded the highest room occupancy levels while five star establishments recorded the highest bed occupancy levels. Bed and room occupancy levels in five star establishments have increased since 2005 but due to the small sample size of five star hotels these results should be treated with some degree of caution.

As illustrated in Figure B-13 below, room occupancy levels for hotels which were not graded decreased by 3 percentage points since 2005. There were only small changes in occupancy levels for 2, 3 and 4 star graded properties (a two percentage point change). Monthly and annual average room occupancy figures for grading are presented in Appendix 2b and 2c.

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



C Guest Houses and Bed and Breakfasts

Sample Size

In 2006, 142 guest houses and bed and breakfast establishments participated in the survey i.e. provided occupancy information at least one month during the course of the year. In an effort 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.

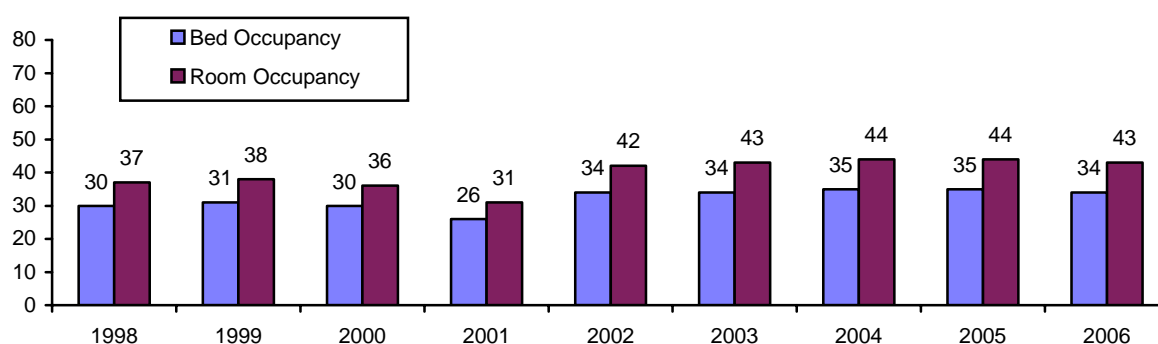
Just over half (52%) of the operators who contributed to the survey provided data for every month of the year. A further 10% provided data for all but one month.

During 2006, 1 guest house and bed and breakfast establishment was recruited to take part in the survey. However, in the same period 23 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, manager being too busy, retirement and establishments being sold or no longer operating.

Annual Average Bed and Room Occupancy

Overall, annual occupancy levels in 2006 were relatively consistent with those recorded in the last few years.

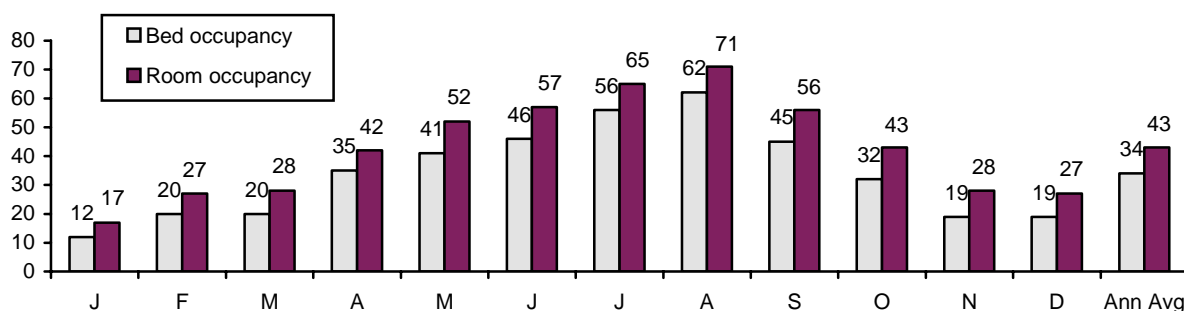
Figure C-1- Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



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 2006 are presented in Figure C-2 below.

Figure C-2- Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2006 (%)



Highlighting the seasonality of this sector, the average bed occupancy rates were 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, peaked in August at 62% then fell to 19% in December. The annual average bed occupancy was 34%. Room occupancy levels followed a similar pattern and had an annual average of 43%.

As shown in Table C-1, monthly room occupancy figures for 2006 were fairly similar to 2005. There were three main exceptions – the first was March which experienced an 8 percentage point decrease comparative to 2005, reflecting the Easter period falling in March in 2005 and April in 2006. The second was the months of January (which recorded a 9 percentage point decrease from 2005) and the third was the month of December (a 7 percentage point increase comparative to December 2005). Trends in monthly bed occupancy rates are presented in Appendix 3a.

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

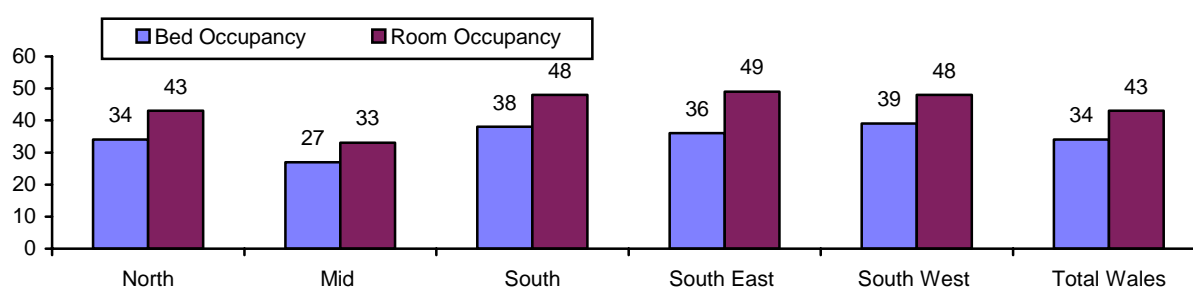
	Room occupancy								
	1998	1999	2000	2001	2002	2003	2004	2005	2006
January	17	16	15	14	22	21	22	26	17
February	25	19	24	20	26	27	27	29	27
March	24	25	24	14	34	30	29	36	28
April	34	34	37	24	33	45	44	40	42
May	45	43	40	34	45	52	49	49	52
June	45	47	47	38	57	50	57	56	57
July	54	57	56	51	60	61	64	63	65
August	66	68	67	60	70	72	73	72	71
September	47	47	44	42	54	54	56	59	56
October	32	36	31	32	41	39	43	41	43
November	20	24	18	22	29	30	28	24	28
December	16	19	18	17	24	24	25	20	27
<i>Annual Average</i>	37	38	36	31	42	43	44	44	43

Occupancy Rates by Regions of Wales

Figure C-3 presents the annual average bed and room occupancy rates for guest houses and bed and breakfast establishments for each region of Wales in 2006. 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 area are presented in Appendix 3d and 3e. However, due to the small sample size in some areas this information is not always available.

Figure C-3- Guest Houses/B&Bs - Annual Average by Regions of Wales – 2006 (%)



The annual bed and room occupancy levels were highest in the South, with relatively consistent occupancy rates being recorded for both South East and South West. In contrast, occupancy levels for Mid Wales occupancy were notably lower, recording 27% for bed occupancy and 33% for room occupancy.

The greatest difference between the annual bed and room occupancy rates recorded in 2006 was recorded by 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 1998 are presented in Table C-2 below.

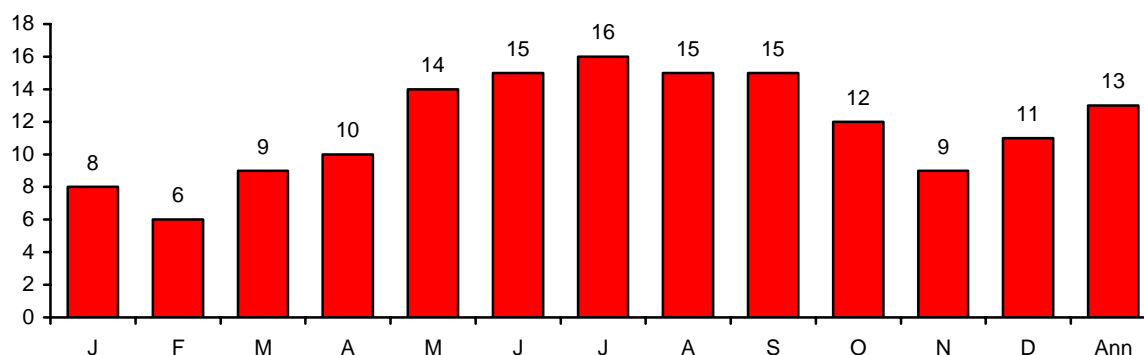
Table C-2 - Guest Houses/B&Bs - Trends in Room Occupancy Rates by Regions of Wales (%)

	Annual Average Room Occupancy								
	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Wales	35	36	31	29	38	40	42	44	43
Mid Wales	33	32	32	24	33	33	33	34	33
South Wales	41	43	41	37	50	49	50	49	48
South East Wales	43	43	43	37	52	52	52	51	49
South West Wales	36	39	36	36	48	46	48	47	48
Total Wales	37	38	36	31	42	43	44	44	43

Room occupancy levels across the different regions in 2006 were very similar to 2005, with any changes by just one or two percentage points. However, as reported previously most areas since 1998, with the exception of Mid Wales, have experienced a notable increase. This increase was most evident in South West Wales.

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 C-4– Guest Houses/B&Bs - Percentage of Overseas Guests- 2006 (%)

Overseas occupancy reached a maximum during the peak summer month of July (16%) and was lowest during February when a rate of 6% was recorded. The annual average percentage of overseas guests in guest houses and bed and breakfast establishments in 2006 mirrored that recorded in 2005 at 13%.

Trends in Percentage of Overseas Guests

After a decrease in the proportion of overseas guests in 2003 to 10%, which was the lowest 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 1998 levels.

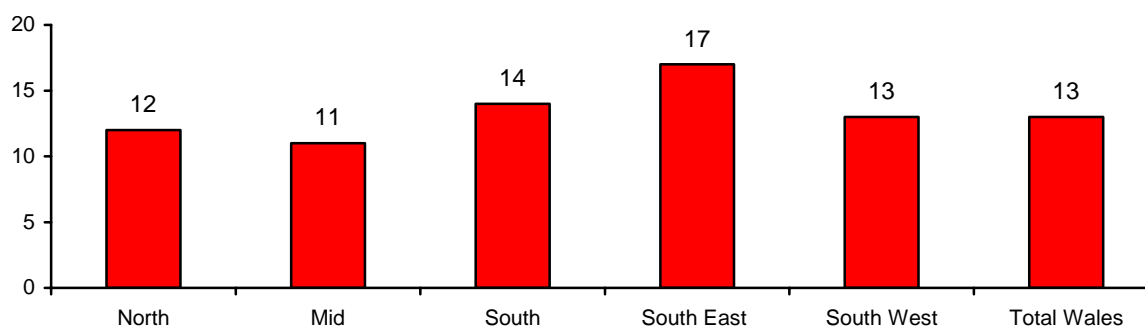
On a monthly basis, the proportion of overseas guests in 2006 was very similar to 2005. The biggest difference in the proportion of overseas visitors was recorded in March and December. The fall of 3 percentage points in March is likely due to the Easter holiday period (when it could be argued that overseas visitors are more likely to travel to visit friends and relatives) falling in March in 2005 and April in 2006. Interestingly, there was no corresponding increase in the April 2006 levels comparative to 2005. December recorded a 3 percentage point increase compared to 2005, the highest recorded December figure since 2002.

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

	% of overseas guests								
	1998	1999	2000	2001	2002	2003	2004	2005	2006
January	13	15	13	11	9	7	10	9	8
February	11	10	9	7	9	5	7	6	6
March	16	17	13	10	10	7	9	12	9
April	23	19	16	12	11	8	10	10	10
May	22	22	17	12	15	12	13	16	14
June	27	24	22	16	16	14	14	16	15
July	29	27	24	16	18	15	17	16	16
August	22	24	19	14	14	10	14	14	15
September	22	23	17	13	12	11	13	14	15
October	18	18	14	15	11	8	10	11	12
November	14	18	13	10	8	10	9	7	9
December	12	13	17	8	11	6	7	8	11
Annual Average	20	20	18	13	13	10	12	13	13

As illustrated in Figure C-5 below, the percentage of overseas guests across the different geographical areas in Wales was in the region of 11-17%, with the South East recording the highest proportion of overseas occupants.

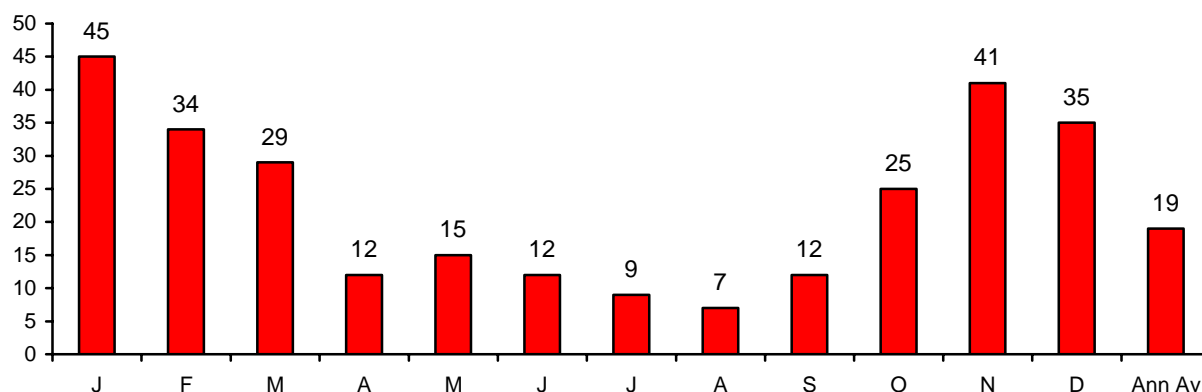
Figure C-5 - Guest Houses/B&Bs - Percentage of Overseas Guests by Region – 2006 (%)



Percentage of Business Guests

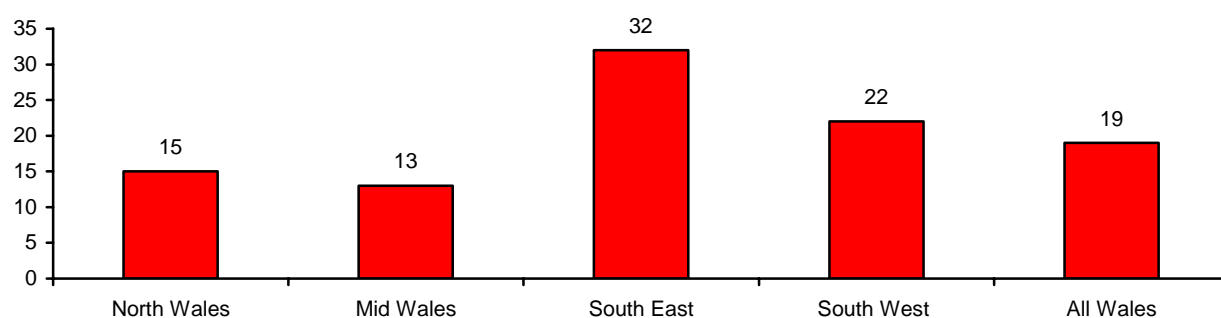
As with hotels, guest house and bed and breakfast operators were also asked from February 2001, to record the number of guests staying for business purposes.

Figure C-6 - Guest Houses/B&Bs - Percentage of Business Guests – 2006 (%)



The annual average proportion of business guests in bed and breakfast and guest house establishments in 2006 was 19%. The percentage of business guests was at its highest in January (45%). In contrast, the proportion of business guests was lowest during the peak summer month of August (7%).

Figure C-7 - Guest Houses/B&BS – Annual Average Percentage of Business Guests by Region – 2006 (%)



As with previous years, the percentage of business guests in the South East was significantly higher in 2006 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

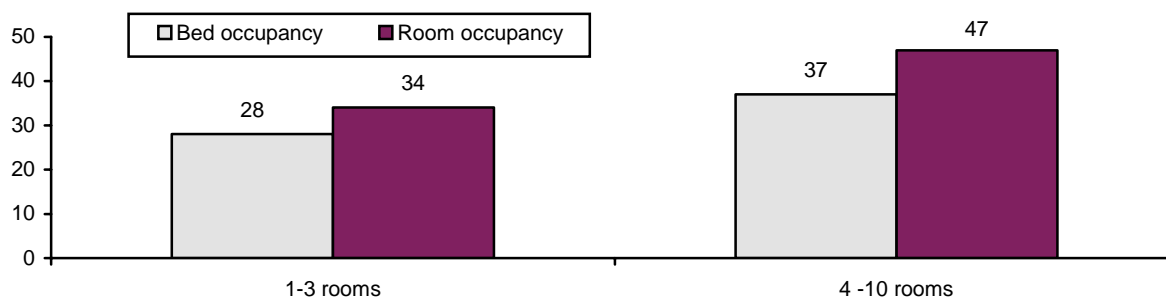
This section of the report looks in more detail at different types of guest house and bed and breakfast establishments who contributed to the survey and the impact, if any, of these factors have on levels of bed and room occupancy.

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 C-8- Annual Occupancy by Size of Guest House/Bed & Breakfast - 2006 (%)



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 10 percentage points respectively) in the larger establishments. 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 more likely to be actively involved in the marketing of the establishment.

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

	Annual Average Room Occupancy								
	1998	1999	2000	2001	2002	2003	2004	2005	2006
1-3 rooms	34	35	32	26	33	34	36	36	34
4-10 rooms	40	41	40	36	45	45	48	48	47

Bed and room occupancy rates for establishments with 1-3 rooms in 2006 were slightly lower than those recorded in 2005, down 2 percentage points for smaller 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 C-9 below presents annual bed and room occupancy figures by tariff for 2006.

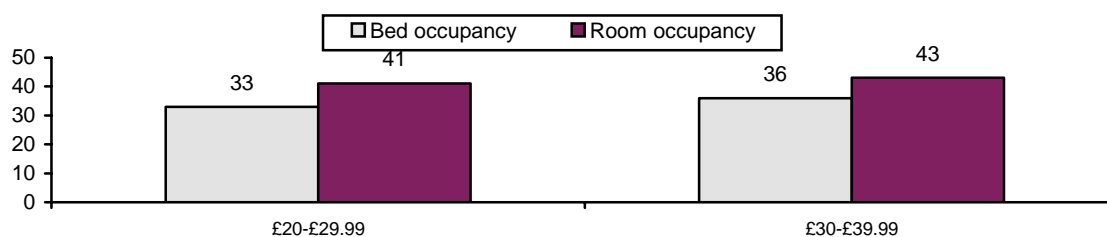
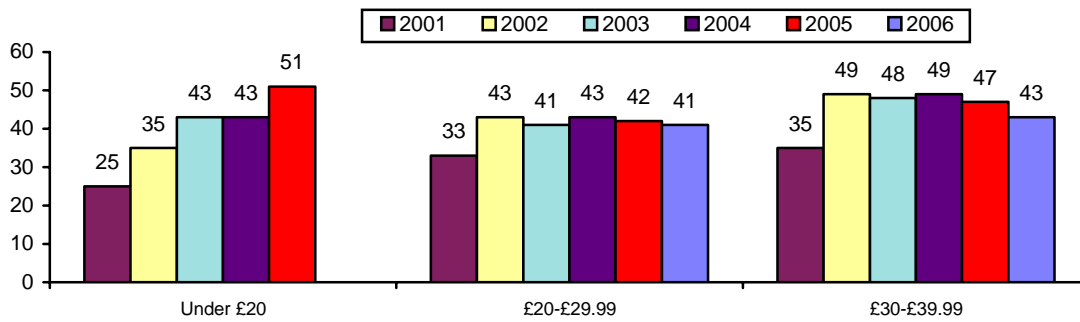
Figure C-9- Annual Occupancy by Tariff of Guest House/B&B – 2006 (%)

Figure C-10 overleaf shows the annual average bed occupancy rates by tariff between 2001 and 2006. 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 C-10- Trends in Annual Room Occupancy Rates by Tariff of Guest Houses/B&BS (%)



Despite a small decrease in both 2005 and 2006, the annual room occupancy rates for establishments charging £20-29.99 have remained relatively consistent over the last five years. However, establishments charging £30-39.99 recorded a 4 percentage point decrease comparative to 2005. 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 the country/village. The monthly bed and room occupancy levels for each type of location are presented in Appendix 3b and 3c.

As illustrated 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 2005, the second highest rates in 2006 were recorded by establishments located in seaside areas with annual bed and room occupancy rates were 39% and 47% respectively.

Figure C-11 - Annual Occupancy by Location of Guest House/B&B - 2006(%)

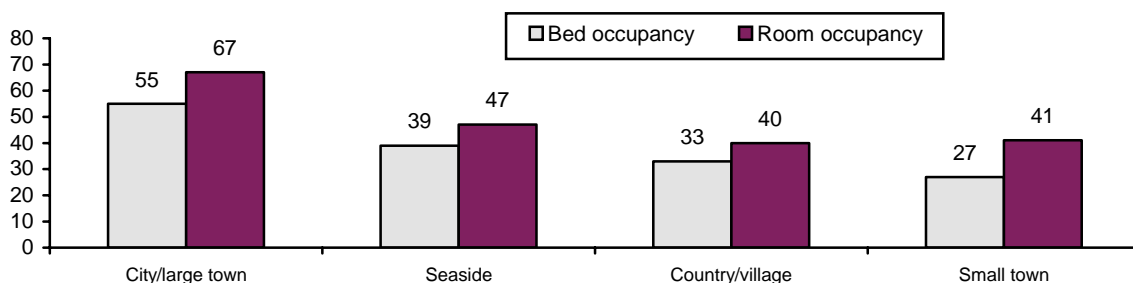


Table C-5- Trends in Annual Room Occupancy Rates by Location of Guest House/B&B (%)

	Annual Average Room Occupancy								
	1998	1999	2000	2001	2002	2003	2004	2005	2006
City/large town	*	*	*	55	67	70	63	64	67
Small town	38	40	37	28	43	39	38	42	41
Seaside	42	43	39	39	37	44	46	47	47
Country/village	33	34	33	27	41	40	41	41	40

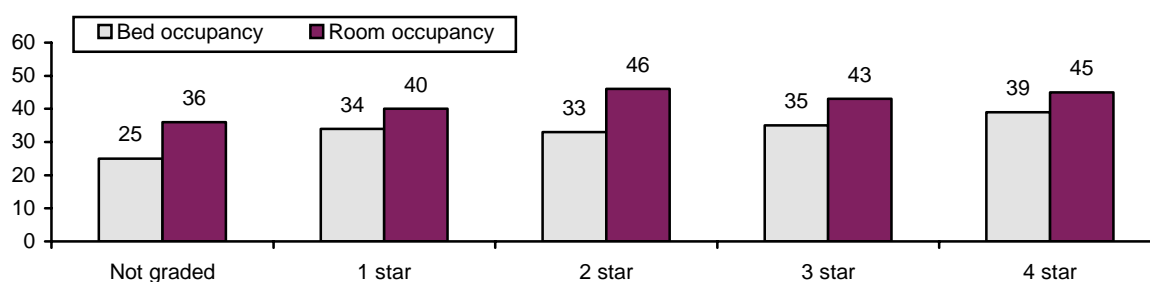
* Data not available due to change in bands for analysis

In 2006, establishments in cities and large towns recorded a 3 percentage point increase comparative to 2005, with the other locations remaining consistent with the levels recorded in 2005.

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.

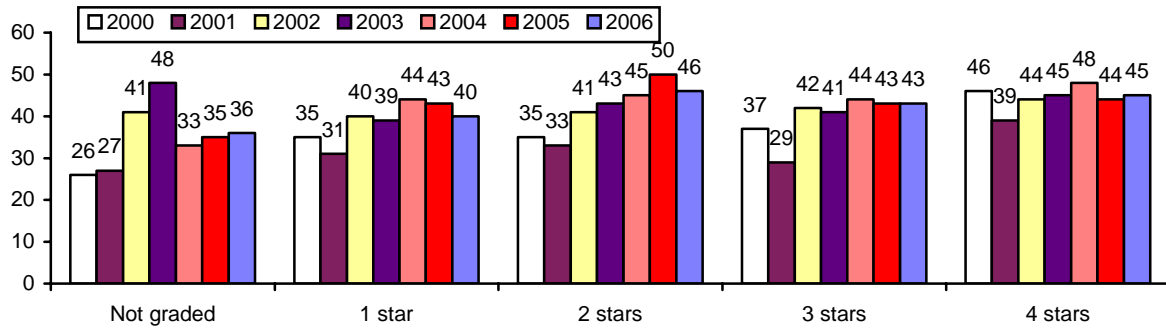
Due to the small sample size of establishments with 5 stars there is no analysis for this grading.

Figure C-12 -Occupancy by Grading of Guest House/B&B- 2006 (%)

As in 2005, graded establishments had higher bed and room occupancy levels than those with no grading.

As shown in figure C-13 overleaf, the annual room occupancy rates in 2006 for non graded, 3 and 4 star establishments were consistent with those recorded in 2005. However, 1 and 2 star graded establishments experienced a decrease in their room occupancy levels of 3 and 4 percentage points respectively.

Figure C-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.

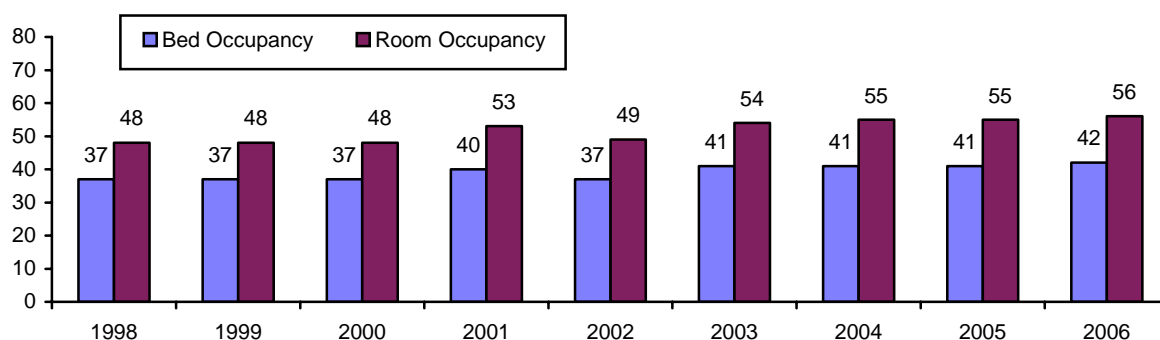
D All Serviced Accommodation

Section D 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 2006, both the annual bed and room occupancy levels for all types of serviced accommodation remained relatively consistent with those recorded since 2003.

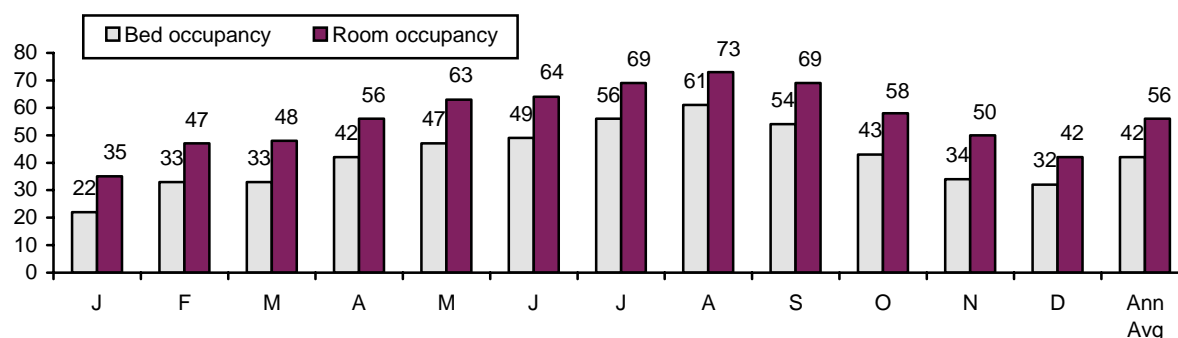
Figure D-1- Serviced Accommodation - Trends in Occupancy Rates - Annual Averages (%)



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 D-2 below.

Figure D-2 – All Serviced Accommodation - Monthly Bed & Room Occupancy - 2006 (%)

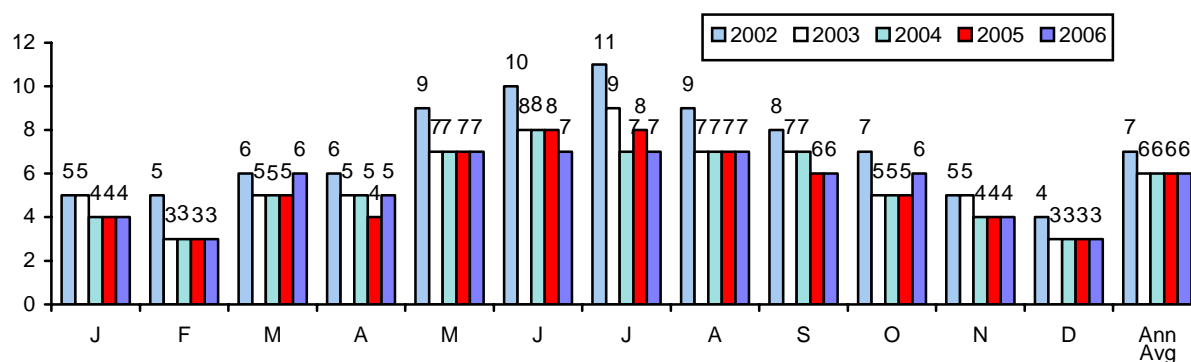


Bed and room occupancy levels were both at their highest during the main summer tourist season, peaking at 61% and 73% respectively in August.

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 D-3– All Serviced Accommodation - Percentage of Overseas Guests – 2006 (%)



The proportion of overseas guests was very consistent with those recorded since 2003 with only the months of March, April, June, July and October recording small changes in occupancy levels compared to 2005. Reflecting these results, the overall average in 2006 was the same as in years 2003 – 2005 (6%) but lower than the comparative figures recorded in 2002.

Appendix 1: Monthly Forms



**SERVICED ACCOMMODATION
OCCUPANCY SURVEY
STRICTLY CONFIDENTIAL**



Month: **NOVEMBER 2006**

Code: **XXX**

ESTABLISHMENT INFORMATION (Please update)

No of Rooms: No of Bedspaces: Maximum charge this month for one person sharing double/twin room for B&B (inc VAT): £ If closed all month, please tick here:

NOTES ON COMPLETING THE FORM

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

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

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

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

Please exclude children in cots from your figures.

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

Date	Number of new arrivals			Total number of guests staying overnight (new guests + stopovers)			Number of bedrooms occupied	Total capacity (including extra rooms/beds used)		Number of business (ie non-leisure) guests	Office Use
	UK	Overseas	Total	UK	Overseas	Total		Rooms	Bedspaces		
1											Prf chk
2											
3											
4											
5											
6											
7											IP
8											
9											
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22											
23											
24											
25											
26											
27											
28											
29											
30											136298
31											WTBOC
Totals											0506

PLEASE RETURN THE COMPLETED FORM BY **12th DECEMBER 2006**

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

Appendix 2: Hotels

Appendix 2a - Hotels: Trends in Bed Occupancy Rates – Monthly Averages (%)

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

Appendix 2b - Hotels: Bed Occupancy 2006 (%)

	2006 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	24	35	35	44	49	50	56	60	55	45	37	34	44
North Wales	22	35	33	44	48	51	58	62	58	45	38	33	44
Mid Wales	24	33	34	48	45	49	55	58	53	45	36	32	43
South Wales	25	35	37	42	50	50	54	59	53	44	36	36	43
South East Wales	27	39	41	41	51	51	50	52	51	45	41	41	44
South West Wales	23	31	32	44	50	49	58	67	56	43	32	31	43
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	17	26	25	38	42	45	53	58	49	39	28	30	38
11-25 rooms	23	28	31	42	45	49	54	57	54	39	31	29	40
26-50 rooms	25	34	36	46	48	46	54	60	54	46	40	37	44
51-100 rooms	27	40	41	45	54	56	58	65	60	52	43	39	49
Over 100 rooms	28	50	43	46	60	58	69	67	59	54	51	44	51
Under £20	*	*	*	*	*	*	*	*	*	*	*	*	*
£20-£29.99	13	20	15	25	30	35	45	46	38	32	17	*	30
£30-£39.99	14	28	34	41	43	43	50	53	53	35	36	21	35
£40-£49.99	27	30	38	47	53	52	57	60	56	51	32	32	44
£50-£59.99	27	35	38	49	53	54	62	54	58	49	38	32	46
£60 & over	26	39	36	43	49	51	56	64	56	45	39	38	45
Not graded	*	16	16	27	40	32	39	44	38	26	13	*	27
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	26	36	37	47	50	54	54	58	54	49	38	34	46
3 stars	23	35	35	43	48	50	55	59	55	44	38	34	43
4 stars	29	37	36	47	50	51	59	66	57	46	38	36	46
5 stars	*	*	35	48	52	60	62	67	64	50	43	*	52
City/large town	28	46	46	46	57	58	62	62	56	53	50	45	50
Countryside/village	25	35	33	44	47	48	55	59	52	42	32	32	42
Seaside	20	33	33	42	47	51	57	65	60	45	41	35	45
Small town	23	30	32	44	48	47	52	54	53	42	32	30	40

* Sample size too small to undertake an analysis

Appendix 2c - Hotels: Room Occupancy 2006 (%)

	2006 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	38	50	51	58	65	66	70	73	71	61	53	44	58
North Wales	33	47	46	55	64	64	71	72	73	59	50	42	57
Mid Wales	35	42	44	57	56	61	66	66	65	56	48	40	53
South Wales	41	53	56	60	69	68	71	75	71	64	57	47	61
South East Wales	44	59	63	59	71	71	70	71	70	65	63	54	63
South West Wales	38	47	49	60	66	66	72	79	71	62	51	42	58
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	27	37	30	45	52	56	61	67	60	49	35	36	47
11-25 rooms	35	39	44	54	61	62	68	67	68	52	44	37	53
26-50 rooms	40	49	53	56	64	61	67	73	70	63	57	47	58
51-100 rooms	38	55	56	58	67	69	72	76	77	71	62	48	62
Over 100 rooms	48	69	66	68	80	79	81	84	80	75	70	56	71
Under £20	*	*	*	*	*	*	*	*	*	*	*	*	*
£20-£29.99	20	30	23	34	50	45	54	56	51	42	23	*	41
£30-£39.99	23	41	51	53	54	55	61	63	66	46	47	27	47
£40-£49.99	39	43	49	56	66	67	68	69	72	64	39	38	55
£50-£59.99	44	50	56	69	69	69	75	69	72	67	54	43	62
£60 & over	40	55	53	57	67	68	71	77	73	63	58	49	61
Not graded	*	25	27	34	52	45	51	53	50	33	16	*	36
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	41	49	53	56	65	65	68	68	69	60	51	44	58
3 stars	38	50	52	59	66	66	71	73	72	62	56	45	59
4 stars	41	52	51	60	67	68	73	77	73	63	55	45	61
5 stars	*	*	33	51	61	66	68	75	72	60	53	*	57
City/large town	47	69	70	66	75	78	82	80	79	76	75	60	71
Countryside/village	37	46	45	55	60	61	65	68	65	55	44	39	53
Seaside	30	45	48	53	63	65	71	76	76	60	55	43	57
Small town	40	47	51	57	67	66	69	72	71	62	51	40	57

* Sample size too small to undertake an analysis

Appendix 2d - Hotels: Bed Occupancy by Unitary Authority Areas 2006 (%)

	2006 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Group A Cardiff Vale of Glamorgan	38	50	51	*	65	*	66	66	61	61	*	*	*
Group B Newport Monmouthshire Torfaen Blaenau Gwent Caerphilly	23	37	40	38	49	48	46	48	47	41	35	36	40
Group C Rhondda Cynon Taff Bridgend Merthyr Tydfil	19	29	32	35	40	39	41	41	40	32	32	33	34
Group D Neath & Port Talbot Swansea	25	41	39	43	44	44	55	66	58	40	39	40	44
Group E Carmarthenshire Pembrokeshire	23	28	29	44	52	51	59	68	55	44	30	29	43
Group F Ceredigion	*	31	31	47	45	56	62	65	53	42	32	28	*
Group G Powys	21	29	29	41	40	39	48	48	46	41	34	31	37
Group H Denbighshire Flintshire Wrexham	28	29	31	39	44	41	45	42	47	36	31	32	37
Group I Conwy	20	34	31	42	43	50	58	65	61	47	43	36	45
Group J Gwynedd Anglesey	23	44	42	54	60	62	69	75	65	53	38	31	52

Appendix 2e - Hotels: Room Occupancy by Unitary Authority Areas 2006 (%)

	2006 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Group A Cardiff Vale of Glamorgan	55	71	74	*	79	*	76	81	78	74	*	*	*
Group B Newport Monmouthshire Torfaen Blaenau Gwent Caerphilly	44	59	60	53	72	73	70	73	73	67	58	47	63
Group C Rhondda Cynon Taff Bridgend Merthyr Tydfil	33	42	54	49	59	58	62	52	55	50	52	44	50
Group D Neath & Port Talbot Swansea	45	60	60	63	66	65	76	81	79	69	67	54	65
Group E Carmarthenshire Pembrokeshire	35	42	44	57	66	66	71	77	68	60	43	37	55
Group F Ceredigion	*	40	40	57	60	73	72	75	66	57	46	33	*
Group G Powys	35	39	41	51	52	53	60	58	59	52	47	41	49
Group H Denbighshire Flintshire Wrexham	44	41	43	50	58	53	59	53	62	50	45	42	50
Group I Conwy	27	43	43	51	58	61	69	74	75	59	55	43	56
Group J Gwynedd Anglesey	33	57	55	66	75	76	83	86	80	65	50	40	64

Appendix 3: Guest Houses and Bed & Breakfasts

Appendix 3a - Guest houses/bed & breakfasts: Trends in Bed Occupancy Rates – Monthly Averages (%)

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

Appendix 3b - Guest houses/bed & breakfasts: Bed Occupancy 2006 (%)

	2006 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	12	20	20	35	41	46	56	62	45	32	19	19	34
North Wales	11	19	19	38	44	47	59	65	45	30	17	15	34
Mid Wales	7	15	15	29	32	34	45	51	40	27	16	13	27
South Wales	16	23	24	36	44	50	59	67	48	36	23	24	38
South East Wales	16	27	29	36	46	45	48	55	44	37	27	30	36
South West Wales	16	20	21	36	44	52	63	72	50	36	20	21	39
1-3 rooms	12	17	16	27	33	34	47	54	38	25	15	13	28
4-10 rooms	12	21	22	39	45	51	60	66	49	36	21	22	37
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
51-100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Over 100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Under £20	*	*	*	*	*	*	*	*	*	*	*	*	*
£20-£29.99	13	19	20	33	41	44	52	60	43	31	19	17	33
£30-£39.99	11	18	18	41	45	48	61	67	48	32	17	18	36
£40-£49.99	*	*	*	*	53	*	*	*	*	*	*	*	*
£50-£59.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£60 & over	*	*	*	*	*	*	*	*	*	*	*	*	*
Not graded	4	17	16	24	30	29	39	47	29	25	19	21	25
1 star	*	*	*	*	40	*	52	58	*	*	*	*	*
2 stars	16	23	25	35	41	43	52	62	46	35	21	16	33
3 stars	12	20	20	36	43	48	57	65	44	31	19	21	35
4 stars	7	14	15	33	43	50	62	63	56	32	15	13	39
5 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
City/large town	*	*	*	*	*	*	*	*	*	*	41	*	*
Countryside/village	10	17	19	35	40	44	55	63	46	31	16	16	33
Seaside	12	18	17	37	49	53	65	74	48	32	21	16	39
Small town	14	19	20	26	32	36	43	46	35	26	18	16	27

* Sample size too small to undertake an analysis

Appendix 3c - Guest houses/bed & breakfasts: Room Occupancy 2006 (%)

	2006 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	17	27	28	42	52	57	65	71	56	43	28	27	43
North Wales	16	26	24	45	54	58	69	77	55	43	26	24	43
Mid Wales	10	19	21	35	39	41	49	55	48	32	23	15	33
South Wales	22	31	34	44	57	64	69	76	60	48	32	34	48
South East Wales	24	38	47	50	63	62	63	64	60	48	39	40	49
South West Wales	21	27	28	42	55	64	71	81	60	48	27	29	48
1-3 rooms	16	23	23	32	41	41	54	62	45	32	20	17	34
4-10 rooms	18	29	30	48	58	64	70	76	61	49	33	31	47
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
51-100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Over 100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Under £20	*	*	*	*	*	*	*	*	*	*	*	*	*
£20-£29.99	18	25	28	40	50	55	61	69	54	43	28	25	41
£30-£39.99	16	23	24	48	56	58	69	75	57	40	25	24	43
£40-£49.99	*	*	*	*	60	*	*	*	*	*	*	*	*
£50-£59.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£60 & over	*	*	*	*	*	*	*	*	*	*	*	*	*
Not graded	7	23	27	36	41	41	50	58	36	37	33	32	36
1 star	*	*	*	*	50	*	49	59	*	*	*	*	*
2 stars	24	33	37	47	55	60	66	73	61	53	33	24	46
3 stars	17	27	27	43	53	57	66	73	53	42	26	30	43
4 stars	10	16	19	37	51	62	67	71	66	37	22	16	45
5 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
City/large town	*	*	*	*	*	*	*	*	*	*	57	*	*
Countryside/village	13	22	24	40	49	52	61	70	54	40	23	21	40
Seaside	18	22	22	45	57	63	74	82	58	43	30	24	47
Small town	26	32	35	37	46	55	60	61	55	43	28	29	41

* Sample size too small to undertake an analysis

Appendix 3d - Guest houses/bed & breakfasts: Bed Occupancy by Unitary Authority Areas 2006 (%)

	2006 Monthly room occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Group A Cardiff Vale of Glamorgan	*	*	*	*	*	*	*	*	*	*	*	*	*
Group B Newport Monmouthshire Torfaen Blaenau Gwent Caerphilly	11	17	21	28	39	39	41	52	38	28	15	14	28
Group C Rhondda Cynon Taff Bridgend Merthyr Tydfil	*	*	*	*	*	*	*	*	*	*	*	*	*
Group D Neath & Port Talbot Swansea	17	26	32	41	43	47	62	70	57	40	25	21	40
Group E Carmarthenshire Pembrokeshire	15	17	16	33	44	55	63	72	47	34	16	20	38
Group F Ceredigion	*	*	*	*	*	*	*	*	*	*	*	*	*
Group G Powys	8	15	14	29	31	31	39	45	39	26	17	14	26
Group H Denbighshire Flintshire Wrexham	15	17	21	24	34	37	40	39	35	23	13	11	25
Group I Conwy	*	18	18	*	56	*	74	76	50	*	*	*	*
Group J Gwynedd Anglesey	6	19	17	42	41	46	60	71	48	34	21	16	36

Appendix 3e - Guest houses/bed & breakfasts: Room Occupancy by Unitary Authority Areas 2006 (%)

	2006 Monthly room occupancy												Avg
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Group A Cardiff Vale of Glamorgan	*	*	*	*	*	*	*	*	*	*	*	*	*
Group B Newport Monmouthshire Torfaen Blaenau Gwent Caerphilly	13	24	37	37	53	54	56	60	55	38	24	21	38
Group C Rhondda Cynon Taff Bridgend Merthyr Tydfil	*	*	*	*	*	*	*	*	*	*	*	*	*
Group D Neath & Port Talbot Swansea	30	39	43	49	52	61	70	79	65	52	37	30	50
Group E Carmarthenshire Pembrokeshire	18	21	21	39	56	66	72	82	58	46	22	29	46
Group F Ceredigion	*	*	*	*	*	*	*	*	*	*	*	*	*
Group G Powys	10	18	19	31	35	36	40	47	44	29	22	17	30
Group H Denbighshire Flintshire Wrexham	30	34	36	34	49	54	62	57	54	51	22	23	40
Group I Conwy	*	21	19	*	64	*	81	88	52	*	*	*	*
Group J Gwynedd Anglesey	10	25	22	51	53	58	69	81	60	46	32	22	45