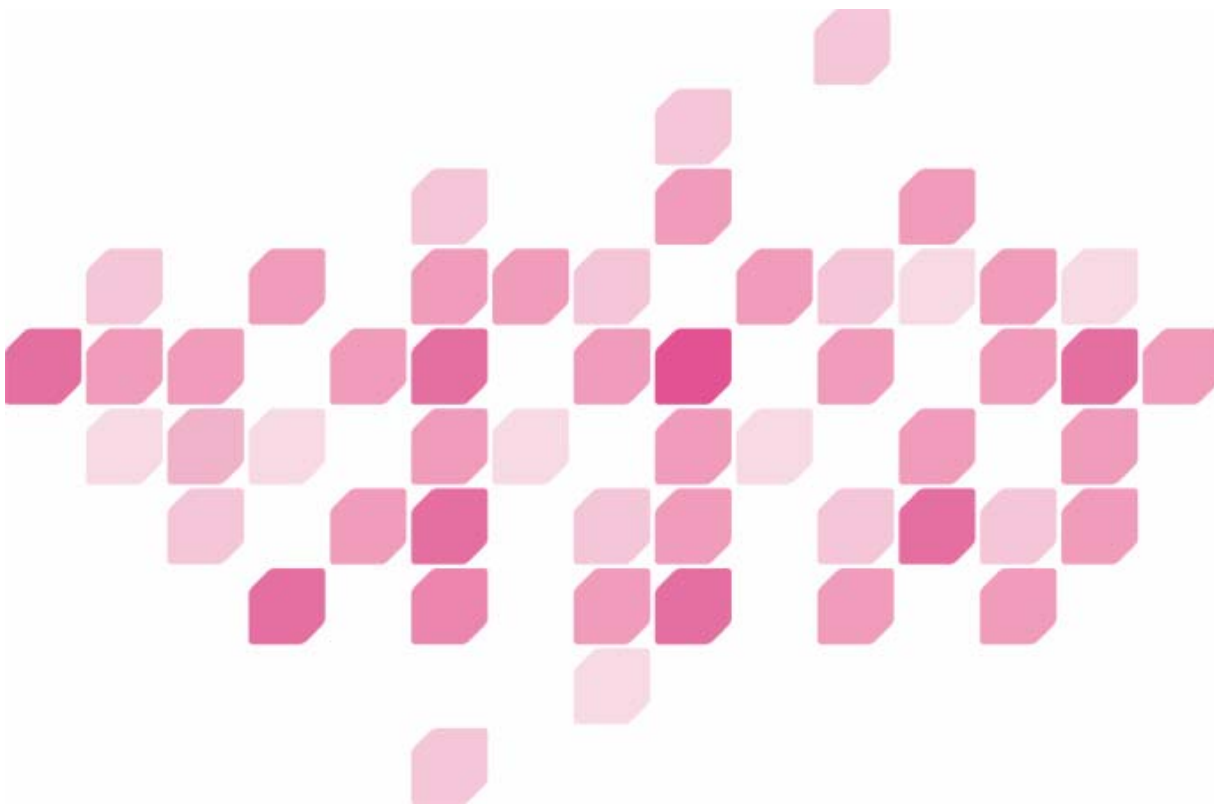


Wales Serviced Accommodation Occupancy Survey 2005 Final Report

April 2006



Wales Accommodation Occupancy Survey 2005

Draft Report

Visit Wales

April 2006

Prepared by:

TNS Travel and Tourism

19 Atholl Crescent
Edinburgh, EH3 8HQ

Telephone: 0131 656 4000
Facsimile: 0131 656 4001
e-mail: enquiries@tns-global.com

112547

Contents

Executive Summary	i
A. Introduction and Methodology	1
Introduction.....	1
Methodology.....	1
B. Hotels	3
Sample Size.....	3
Annual Average Bed and Room Occupancy.....	3
Occupancy Rates by Regions of Wales.....	5
Percentage of Overseas Guests.....	7
Trends in Percentage of Overseas Guests.....	8
Percentage of Business Guests.....	9
C Guest Houses and Bed and Breakfasts	17
Sample Size.....	17
Annual Average Bed and Room Occupancy.....	17
Monthly Bed and Room Occupancy.....	18
Trends in Occupancy Rates by Regions of Wales.....	19
Percentage of Overseas Guests.....	20
Trends in Percentage of Overseas Guests.....	20
Percentage of Business Guests.....	22
Detailed Analysis of Main Results.....	23
D All Serviced Accommodation	28
Annual Average Bed and Room Occupancy.....	28
Percentage of Overseas Guests.....	29
Appendix 1: Monthly Forms	30
Appendix 2: Hotels	31
Appendix 3: Guest Houses and Bed & Breakfasts	36

Executive Summary

Introduction

Since 1972, a continuous occupancy survey has been undertaken amongst graded hotel accommodation providers to monitor levels of demand for hotel beds and rooms in Wales. In order 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.

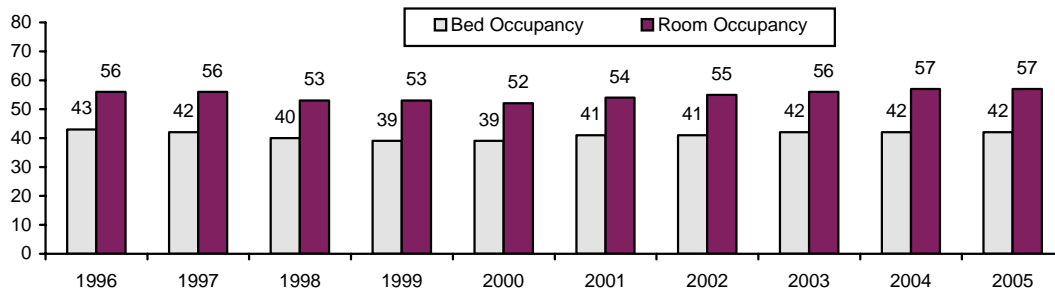
This summary presents the 2005 occupancy figures for the two serviced accommodation sectors – hotels; and guest houses and bed and breakfast establishments. Where available, comparative figures are presented from previous years.

Hotels

Annual Averages

The annual average bed and room occupancy rates in 2005 (42% and 57% respectively), was identical to those recorded in 2004.

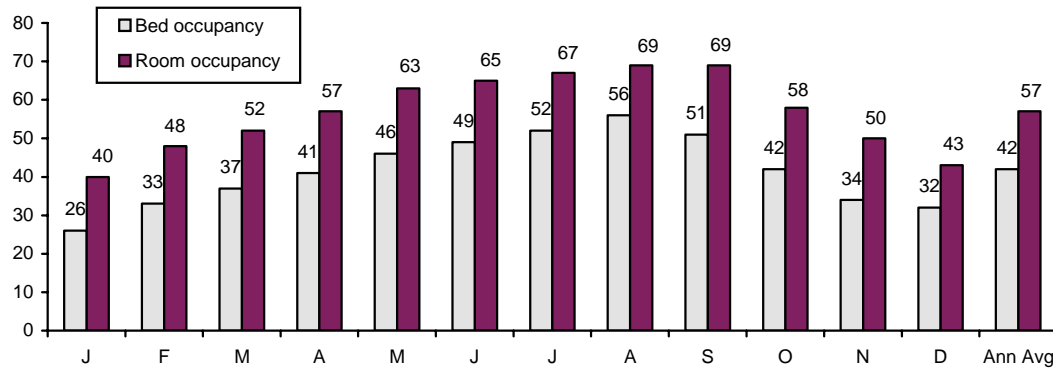
Figure A-1- Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The seasonality of the hotel sector is illustrated with the average bed occupancy rate peaking during August (56%), having risen from 26% in January and falling to 32% in December. This variation is also evident in the average room occupancy figures recorded which rose from 40% in January to 69% in August and September and falling to 43% in December.

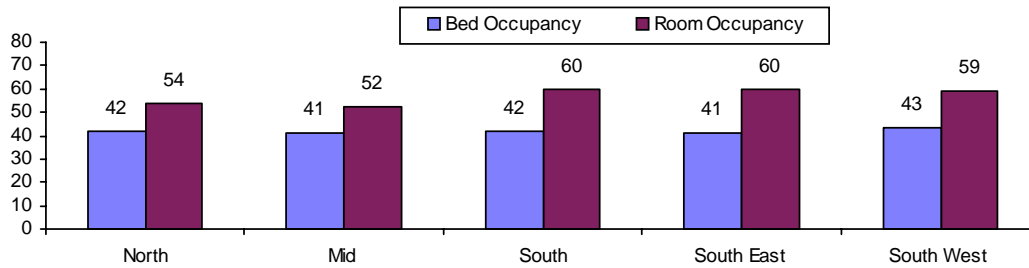
Figure A-2- Hotels - Monthly Bed & Room Occupancy – 2005 (%)



Occupancy rates by regions of Wales

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

Figure A-3 - Hotels - Annual Average by Regions of Wales – 2005 (%)



In 2005, there was little difference in the annual bed occupancy rates recorded by the different regions in Wales. Bed occupancy levels were similar to 2004, with any change only by one percentage point.

However, there was some variation in the annual room occupancy figures recorded for each region. Establishments located in the South and South East recorded the highest room occupancy levels (both 60%). South West Wales also recorded a relatively high room occupancy level at 59%. Mid and North Wales recorded lower room occupancy levels of 52% and 54%, respectively.

Percentage of Overseas Guests

As expected, overseas occupancy was highest during the main tourist season (May to September), with 5-6% of overseas guests during these months. The proportion of overseas guests has been decreasing for the past nine years with the annual average falling from 11% in 1997 to 4.5% in 2005. Only the winter months of January, November and December had an increase in the proportion of overseas guests, although only by one percentage point.

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 11-22 percentage points higher than the comparative figures for establishments with 4-10 rooms. These establishments tend to be open all year and to more 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. Hotels charging over £60 recorded the highest bed and room occupancy levels of 44% and 60% respectively while hotels charging £20-£29.99 recorded the lowest occupancy levels of 32% and 44% respectively.

Occupancy by Location

In line with previous findings, the highest annual bed and room occupancy levels in 2005 were recorded by establishments located in cities and large towns (45% and 67% 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

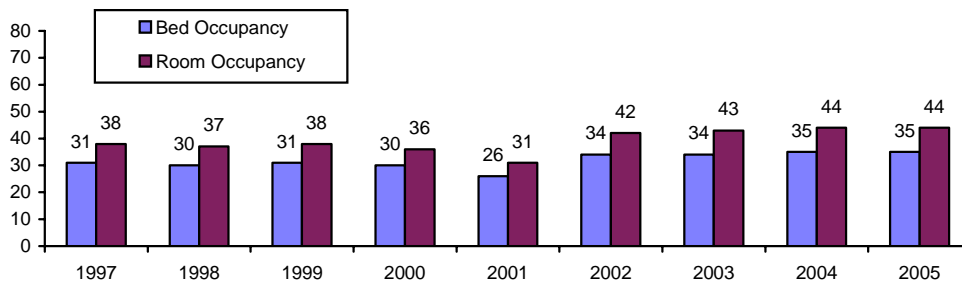
Non-graded establishments recorded lower occupancy levels than any of the establishments in the scheme. Within the scheme, occupancy levels for four star establishments recorded the highest room occupancy levels while five star establishments recorded the highest bed occupancy levels.

Guest Houses and Bed and Breakfasts

Annual Averages

Overall, annual occupancy levels in 2005 were identical to those recorded in 2004. Occupancy levels remained fairly consistent between 1997 and 2000 before falling in 2001. 2004 and 2005 annual bed and room occupancy rates are the highest recorded since 1997

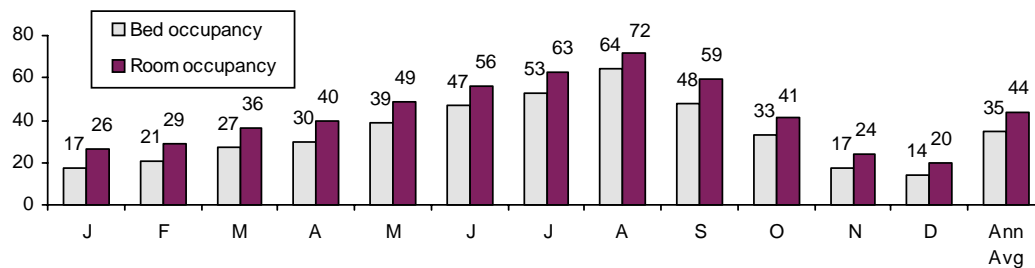
Figure A-4- Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

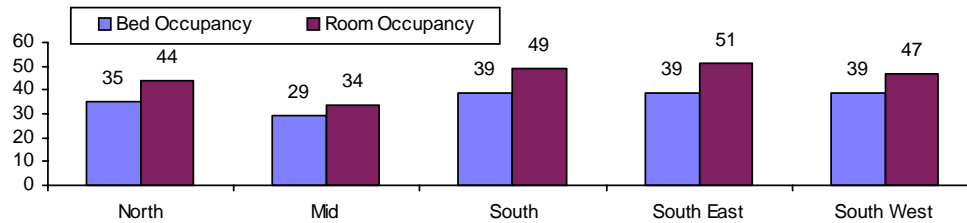
Highlighting the seasonality of this sector, the average bed occupancy rates were at their highest for guest houses and bed and breakfasts during the main tourist season (June to September). The annual average bed occupancy was 35%. Room occupancy levels followed a similar pattern and had an overall average of 44%.

Figure A-5- Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2005 (%)



Occupancy Rates by Regions of Wales

Figure A-6- Guest Houses/B&Bs - Annual Average by Regions of Wales – 2005 (%)



The annual bed and room occupancy levels were the highest in the South, particularly the South East area (39% and 51% respectively). In contrast, occupancy levels for Mid Wales occupancy were notably lower, some 10-17 percentage points lower than for South East Wales. The greatest difference between the annual bed and room occupancy rates recorded in 2005 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 months from May to 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 has increased over the past two years to 13% in 2005.

Occupancy by Size of Guest House/Bed & Breakfast

Similar to the hotel sector, there would appear to be a positive relationship with the size of establishments - both the annual bed and room occupancy rates were higher 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

There is no positive relationship between tariff and occupancy levels. For example, bed occupancy was highest amongst establishments in the most expensive tariff band (£30-£39.99) while room occupancy levels were highest amongst those charging under £20.

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. The second highest rates in 2005 were recorded by establishments located in seaside areas - annual bed and room occupancy rates were 38% and 47% respectively. In 2005, establishments located in seaside locations recorded their highest annual room occupancy rates over the last nine years.

Occupancy by Grading

Graded establishments had higher bed and room occupancy levels than those with no grading. However, there was not a positive relationship with the level of star grading in the scheme and occupancy levels. For example, room occupancy levels for 2 star establishments were highest while 4 star establishments had the highest bed occupancy levels. The annual room occupancy rates in 2005 for 2 star and non graded establishments were slightly higher than those recorded in 2004. 1, 3 and 4 star graded establishments experienced a slight decrease in their room occupancy levels.

All Accommodation

In 2005, there was no change in annual average bed (41%) and room occupancy levels (55%) for all types of serviced accommodation to those recorded in 2004, which were the highest recorded over the period since 1997. Both bed and room occupancy levels were at their highest during the main tourist season, peaking at 58% and 69% respectively in August 2005.

The proportion of overseas guests in most months was the same in 2005 as in 2004. The only exceptions were April and September (both decreased 1 percentage point) and July, which increased by 1 percentage point. Reflecting these results the overall average in 2005 was the same as in 2004 (6%) but lower than the comparative figures recorded in 2001 and 2002.

A. Introduction and Methodology

Introduction

Since 1972, a continuous occupancy survey has been undertaken amongst graded hotel accommodation providers to monitor levels of demand for hotel beds and rooms in Wales. In order 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 most comprehensive and up-to-date information on the demand for serviced accommodation in Wales. The rapid 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 2005 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

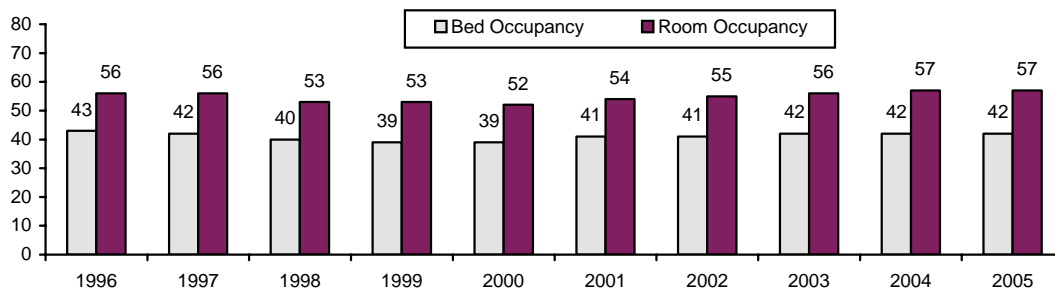
In 2005, a total of 164 hotels participated in the survey (i.e. provided occupancy information for at least one month of the year). In an attempt to ensure that the results are comparable across the months, a considerable amount of effort was placed on trying to maintain the level of response each month and operators have been encouraged to provide a full response over the year. Over one in two (56%) of the operators who contributed to the survey provided data for every month of the year. A further 13% provided data for all but one month of the year.

During this period, 9 hotels were recruited to take part in the survey. However, in the same period 22 establishments withdrew or were deleted from the survey. Establishments were deleted as they had not sent returns in a long period. 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 2005 (42% and 57% respectively), were identical to levels recorded in 2004.

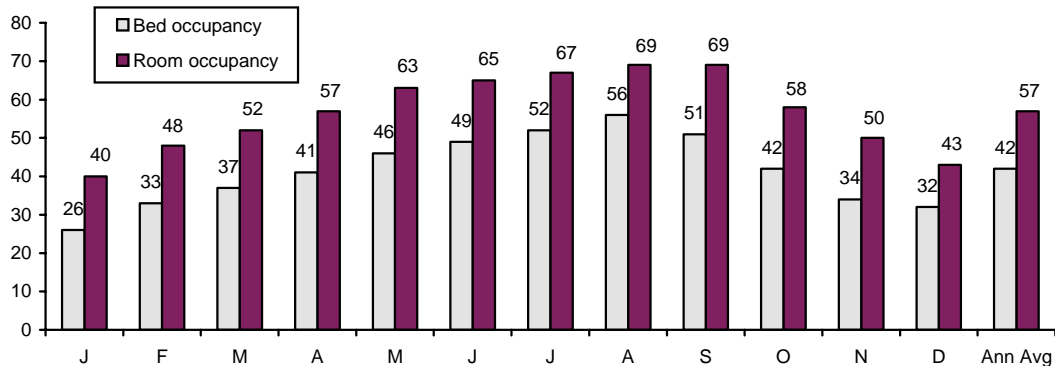
Figure B-1 - Hotels - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the hotel sector in 2005 are presented in Figure B-2 below.

Figure B-2- Hotels - Monthly Bed & Room Occupancy – 2004 (%)



The seasonality of the hotel sector is illustrated with the average bed occupancy rate peaking during August (56%), having risen from 26% in January and falling to 32% in December. This variation is also evident in the average room occupancy figures recorded which rose from 40% in January to 69% in August and September and falling to 43% in December.

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

	Room occupancy								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
January	30	31	31	31	33	36	37	35	40
February	42	42	38	42	43	47	48	49	48
March	48	43	45	44	44	50	50	52	52
April	51	53	51	52	49	52	56	54	57
May	61	60	58	58	61	60	62	63	63
June	64	64	62	61	63	63	63	65	65
July	69	67	67	67	66	65	66	67	67
August	72	68	69	68	70	67	69	68	69
September	67	67	67	63	64	65	67	69	69
October	58	54	55	55	58	58	58	58	58
November	47	44	47	47	53	50	50	52	50
December	39	37	37	41	43	42	43	45	43
Annual Average	56	53	53	52	54	55	56	57	57

In 2005, room occupancy rates increased during January, April and August. January and April recorded their highest room occupancy levels in the past nine years. February, November and December had a small decrease in room occupancy from 2004. Trends in monthly bed occupancy rates since 1997 are presented in Appendix 2a.

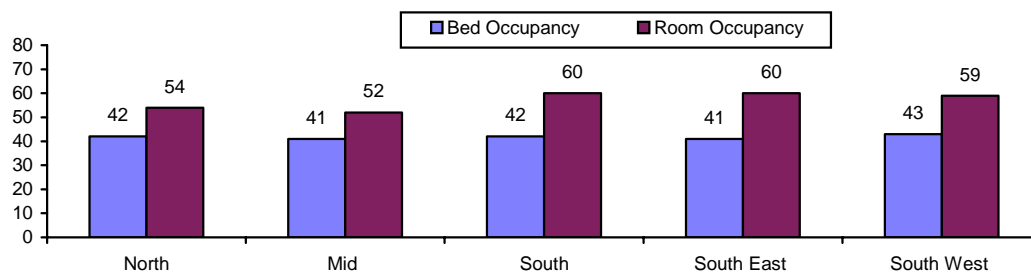
Occupancy Rates by Regions of Wales

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 – 2005 (%)



In 2005, there was little difference in the annual bed occupancy rates recorded by the different regions in Wales. Bed occupancy levels were similar to 2004, with any change only by one percentage point.

However, there was some variation in the annual room occupancy figures recorded for each region. Establishments located in the South and South East recorded the highest room occupancy levels (both 60%). South West Wales also recorded a relatively high room occupancy level at 59%. Mid and North Wales recorded lower room occupancy levels of 52% and 54%, respectively.

Bed and room occupancy levels for each region on a monthly basis for 2004 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 1997 are presented in Table B-2.

Room occupancy rates in North, Mid and South Wales did not change since 2004. In South West Wales, room occupancy levels continued to increase and were at their highest level in the past nine years. However, in South East Wales, room occupancy levels dropped slightly from 2004 (by 3 percentage points).

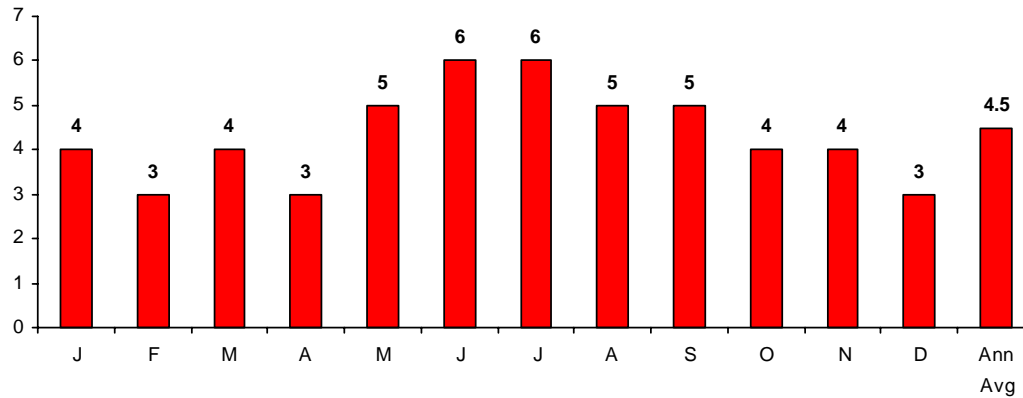
Table B-2- Hotels - Trends in Room Occupancy Rates by Regions of Wales (%)

	Annual Average Room Occupancy								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
North Wales	56	53	52	53	53	52	53	54	54
Mid Wales	46	44	42	43	44	49	51	52	52
South Wales	56	56	56	55	58	58	59	60	60
South East Wales	59	60	59	57	61	60	62	63	60
South West Wales	44	43	44	48	53	56	54	55	59

Percentage of Overseas Guests

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

Figure B-4- Hotels - Percentage of Overseas Guests 2005 (%)



As expected, overseas occupancy was highest during the main tourist season (May to September), with 5-6% of overseas guests during these months. The annual average proportion of overseas guests was 4.5%.

Trends in Percentage of Overseas Guests

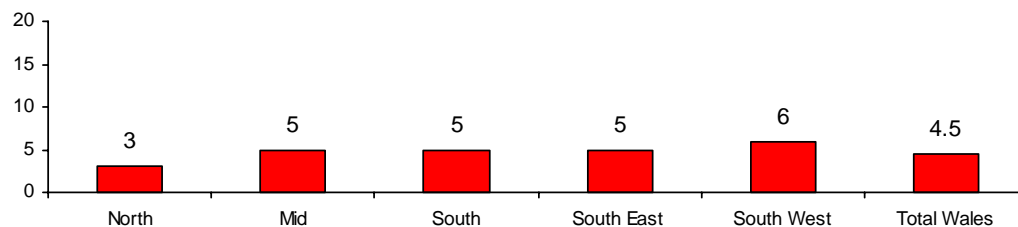
As illustrated in Table B-3, the percentage of overseas guests in 2005 was slightly lower than 2004. The proportion of overseas guests has been decreasing for the past nine years with the annual average falling from 11% in 1997. Only the winter months of January, November and December had an increase in the proportion of overseas guests, although each by only one percentage point.

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

	% of overseas guests								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
January	6	6	6	5	5	5	4	3	4
February	6	4	4	5	4	4	3	3	3
March	8	7	8	6	5	5	5	5	4
April	9	10	7	7	10	5	5	4	3
May	15	12	10	10	9	8	6	6	5
June	18	15	13	10	10	9	7	7	6
July	19	18	10	11	11	9	8	6	6
August	14	13	12	10	8	8	6	6	5
September	15	13	10	9	7	7	6	6	5
October	9	8	9	8	6	6	4	5	4
November	6	9	7	4	4	5	4	3	4
December	5	6	4	3	3	3	2	2	3
Annual Average	11	10	8	8	7	7	5	5	4.5

The proportion of overseas guests was highest in the South West region (6%, an increase from 5% in 2004) and lowest in the North of Wales (3% a decrease from 4% in 2004). The other regions each recorded the same proportion of overseas guests as in 2004 (5%).

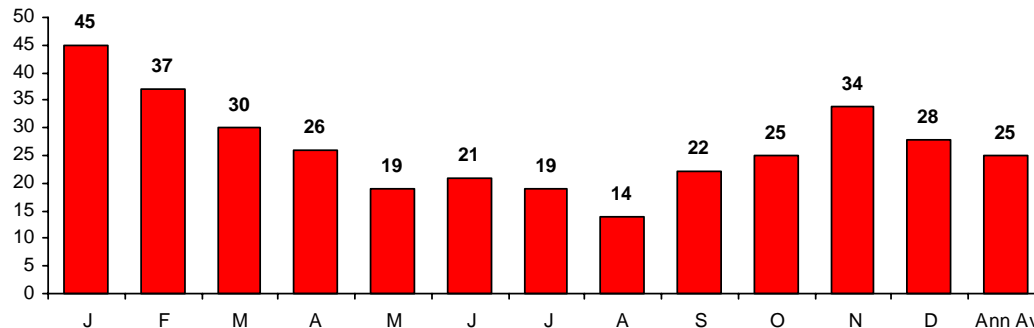
Figure B-5- Hotels - Percentage of Overseas Guests by Region 2005 (%)



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 2005 (%)



In contrast 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 45%, which decreased to 14% in August, before rising again to 34% in November. The annual average proportion of business guests was 25%, a slight decrease from 2004. March had the greatest decrease since 2004 (9 percentage points), most likely reflective of the timing of Easter.

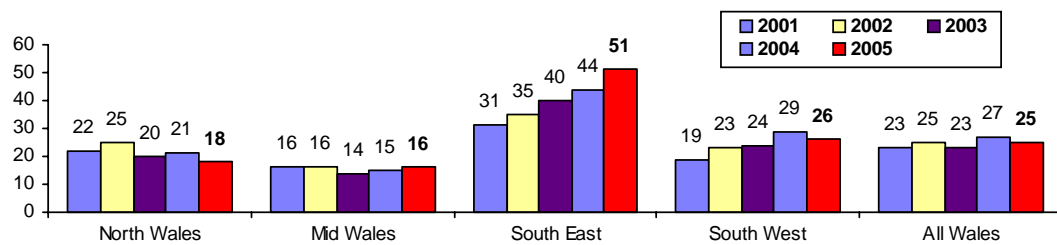
Table B-4 Trends in Percentage of Business Guests

	% of business guests				
	2001	2002	2003	2004	2005
January	-	40	36	41	45
February	38	34	33	38	37
March	36	28	30	39	30
April	31	30	21	25	26
May	20	23	18	24	19
June	17	18	19	20	21
July	18	23	17	22	19
August	13	18	13	15	14
September	20	22	20	21	22
October	25	27	28	25	25
November	30	34	38	38	34
December	23	21	26	24	28
Annual Average	23	25	23	27	25

- data not available

As with previous years, the proportion of business guests is significantly higher in the South East of Wales than in the other regions, with a difference of between 25 and 35 percentage points compared to other regions. Given that the South East region encompasses the city of Cardiff, it is not surprising that this should be the case. However, it is interesting to view the steady increase in the proportion of business tourism in the South East since 2001. Business tourism is clearly an increasingly important sector to the South East. It should be noted the 2001 figures are based on February-December results only.

Figure B-7-Hotels – Annual Average Percentage of Business Guests by Region 2001 - 2005



Detailed Analysis of Main Results

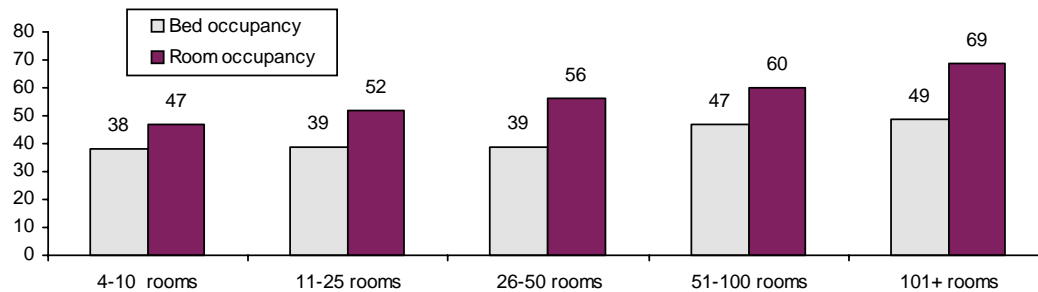
This section of the report looks in more detail at different attributes of the hotels and their influence, if any, on levels of bed and room occupancy.

Occupancy by Size of Hotel

The annual average bed and room occupancy figures by size of hotel for 2005 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 - 2005 (%)



There is a positive relationship between the size of hotels and occupancy levels. Hotels with over 100 rooms recorded occupancy levels some 11-22 percentage points higher than the comparative figures for establishments with 4-10 rooms. There are a number of factors that could have contributed to the higher occupancy levels for larger hotels. These establishments tend to be open all year and to more 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								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
4-10 rooms	45	44	42	40	43	43	44	48	47
11-25 rooms	51	50	49	46	49	51	50	50	52
26-50 rooms	55	53	54	56	55	53	54	56	56
51-100 rooms	66	56	54	59	60	60	63	66	60
101+ rooms	67	65	66	65	67	68	68	68	69

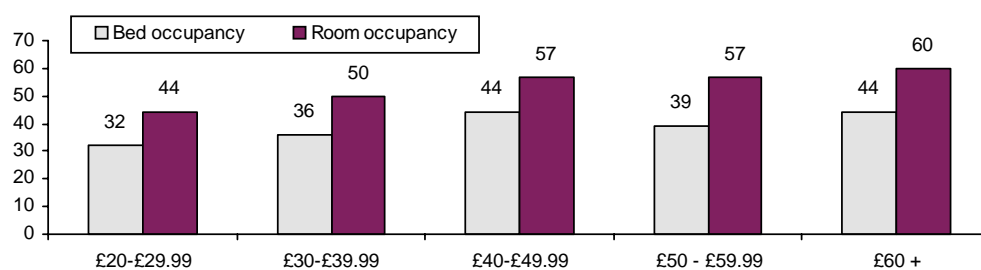
The trend for occupancy levels to increase as the size of the hotel increases has been evident since 1997. However, hotels with 51-100 rooms had a decrease in room occupancy levels in 2005 (six percentage points). Room occupancy levels only changed by a maximum of two percentage points in other sized hotels.

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 2005. Due to the small sample size there is no analysis for hotels with a tariff of less than £20.

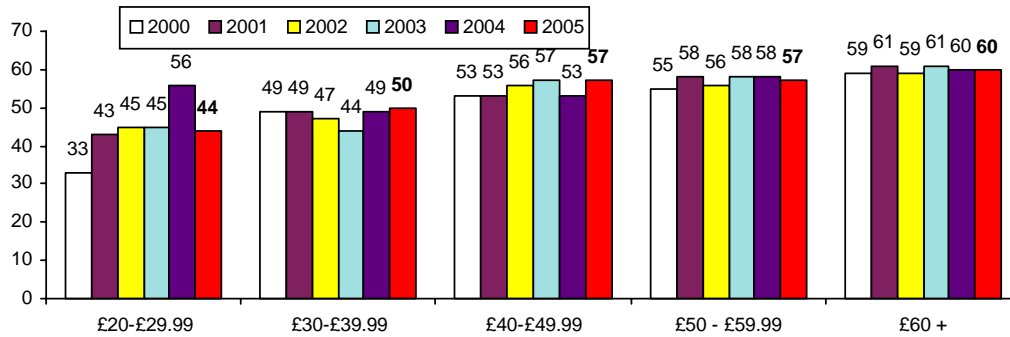
Figure B-9- Annual Occupancy by Tariff of Hotel – 2005 (%)



There is a positive relationship between the tariff charged and occupancy levels. Hotels charging over £60 recorded the highest occupancy levels of 44% and 60% respectively while hotels charging £20-£29.99 recorded the lowest occupancy levels of 32% and 44% respectively.

Figure B-10 overleaf shows the annual average room occupancy rates by tariff for 2000 - 2005. Due to a change in the tariff bandings used in the analysis in 2000, there are no comparative figures available prior to this.

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



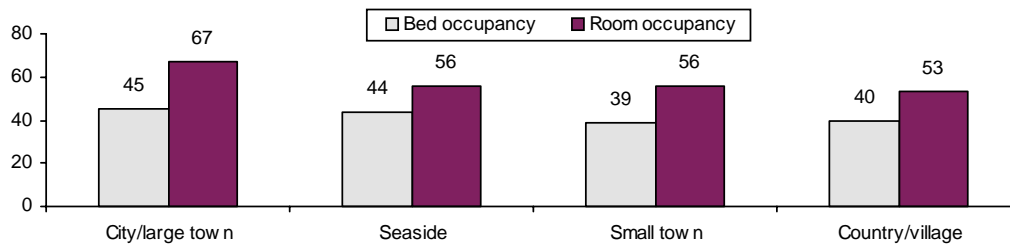
Hotels charging between £20 and £29.99 have experienced a 12 percentage point decrease in their annual room occupancy rates between 2004 and 2005, returning to similar levels experienced from 2001 to 2003. Hotels charging £40-£49.99 had an increase in room occupancy levels of 4 percentage points while other tariff bands have remained relatively stable.

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 - 2005 (%)



In line with previous findings, the highest annual bed and room occupancy levels in 2005 were recorded by establishments located in cities and large towns (45% and 67% 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.

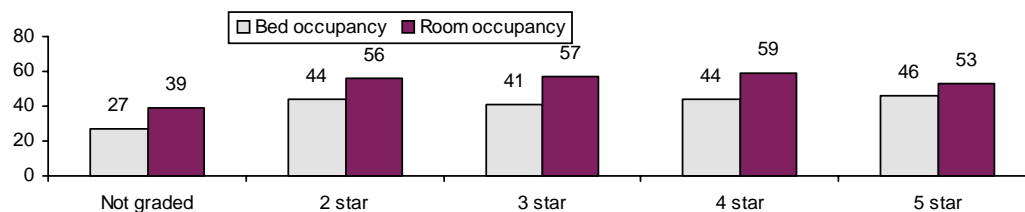
Table B-4- Trends in Annual Room Occupancy Rates by Location of Hotel (%)

	Annual Room Occupancy								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
City/large town	64	64	64	60	66	69	72	69	67
Small town	52	49	50	51	54	52	53	54	56
Seaside	55	54	53	56	56	56	57	56	56
Country/village	50	49	46	46	48	49	52	53	53

Room occupancy rates across most locations have remained fairly constant during the 1997-2005 period, 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 2005 were at their highest levels in the past nine years.

Occupancy by Grading

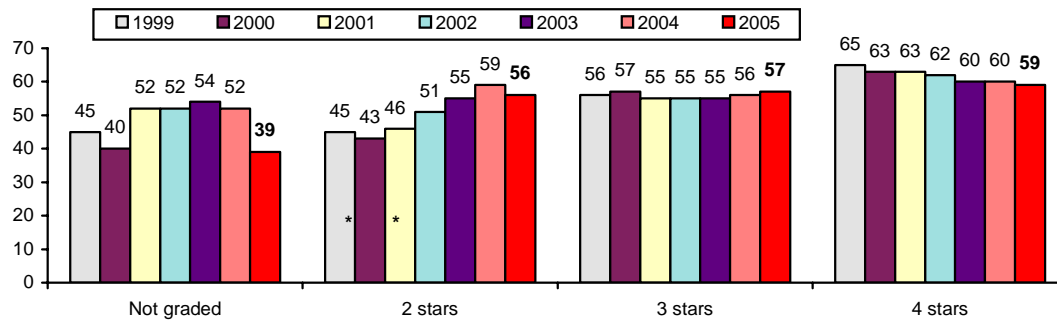
Since 1999, occupancy rates for hotels are also analysed according to their grading under the Star Grading Scheme administered by Wales Tourist Board. On this basis, there are no comparable figures available prior to 1999. Due to the small sample sizes involved, there is no analysis for establishments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

Figure B-12- Annual Occupancy by Grading of Hotel – 2005 (%)

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 2004 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 overleaf, room occupancy levels for hotels which were not graded decreased by 13 percentage points since 2004. There were only small changes in occupancy levels for 2, 3 and 4 star graded properties (1-3 percentage points 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 (%)



* Sample size too small

C Guest Houses and Bed and Breakfasts

Sample Size

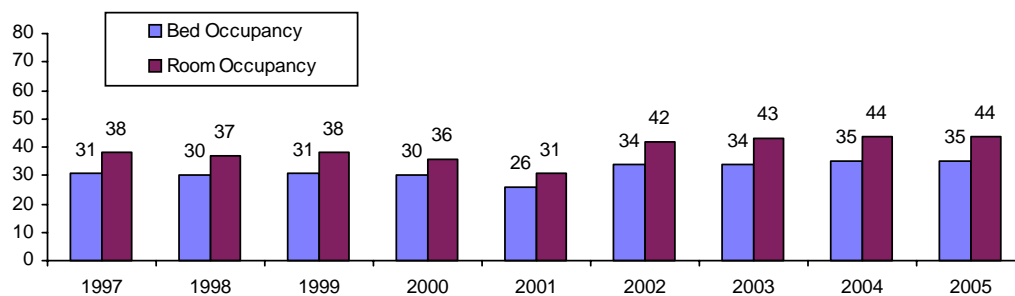
In 2005, 165 guest houses and bed and breakfast establishments participated in the survey i.e. provided occupancy information for at least one month of the year. In an attempt to ensure that the results are comparable across the months, a considerable amount of effort was placed on trying to maintain the level of response each month and operators have been encouraged to provide a full response over the year. Over one in two (54%) of the operators who contributed to the survey provided data for every month of the year. A further 14% provided data for all but one month.

During 2005, 6 guest houses and bed and breakfast establishments were 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 2005 were identical to those recorded in 2004. Occupancy levels remained fairly consistent between 1997 and 2000 before falling in 2001. 2004 and 2005 annual bed and room occupancy rates are the highest recorded since 1997.

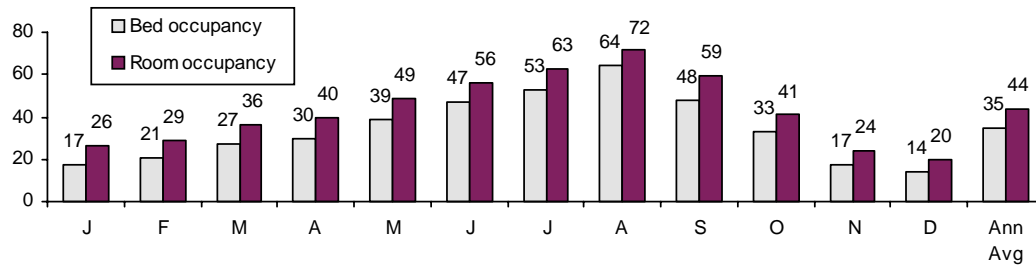
Figure D-1- Guest Houses/B&Bs - Trends in Occupancy Rates - Annual Averages (%)



Monthly Bed and Room Occupancy

The monthly bed and room occupancy rates along with the annual averages recorded in the guest house and bed and breakfast sector in 2005 are presented in Figure C-2 below.

Figure C-2- Guest Houses/B&Bs - Monthly Bed & Room Occupancy - 2005 (%)



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 (June to September). Bed occupancy increased in the first half of the year from 17% in January, peaked in August at 64% then fell to 14% in December. The annual average bed occupancy was 35%. Room occupancy levels followed a similar pattern and had an annual average of 44%.

As shown in Table C-1, monthly room occupancy figures for 2005 were fairly similar to 2004. The main exception was March which experienced a 7 percentage point increase in 2005, reflecting the Easter period. 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 (%)

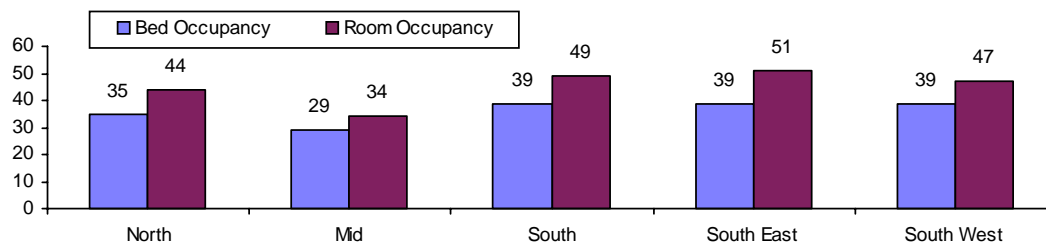
	Room occupancy								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
January	13	17	16	15	14	22	21	22	26
February	22	25	19	24	20	26	27	27	29
March	29	24	25	24	14	34	30	29	36
April	29	34	34	37	24	33	45	44	40
May	44	45	43	40	34	45	52	49	49
June	46	45	47	47	38	57	50	57	56
July	57	54	57	56	51	60	61	64	63
August	68	66	68	67	60	70	72	73	72
September	47	47	47	44	42	54	54	56	59
October	37	32	36	31	32	41	39	43	41
November	23	20	24	18	22	29	30	28	24
December	20	16	19	18	17	24	24	25	20
Annual Average	38	37	38	36	31	42	43	44	44

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 2005. 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 – 2005 (%)



The annual bed and room occupancy levels were the highest in the South, particularly the South East area (39% and 51% respectively). In contrast, occupancy levels for Mid Wales occupancy were notably lower, some 10-17 percentage points lower than for South East Wales.

The greatest difference between the annual bed and room occupancy rates recorded in 2005 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 1997 are presented in Table C-2 below.

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

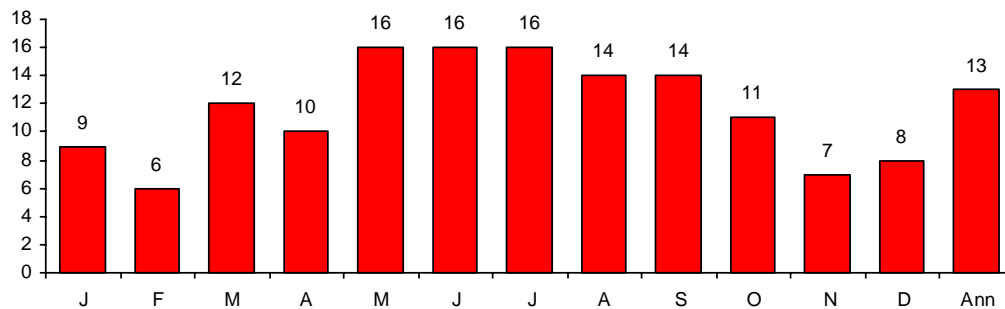
	Annual Average Room Occupancy									
	1997	1998	1999	2000	2001	2002	2003	2004	2005	
North Wales	35	35	36	31	29	38	40	42	44	
Mid Wales	35	33	32	32	24	33	33	33	34	
South Wales	41	41	43	41	37	50	49	50	49	
South East Wales	44	43	43	43	37	52	52	52	51	
South West Wales	34	36	39	36	36	48	46	48	47	

Room occupancy levels across the different regions in 2005 were very similar to 2004, with any changes by just one or two percentage points. However, since 1997, most areas, 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- 2005 (%)



Overseas occupancy reached a maximum during the peak summer months from May to 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 2005 was 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 1997, the proportion increased over the past two years and returned to a level similar to those recorded in 2001 and 2002.

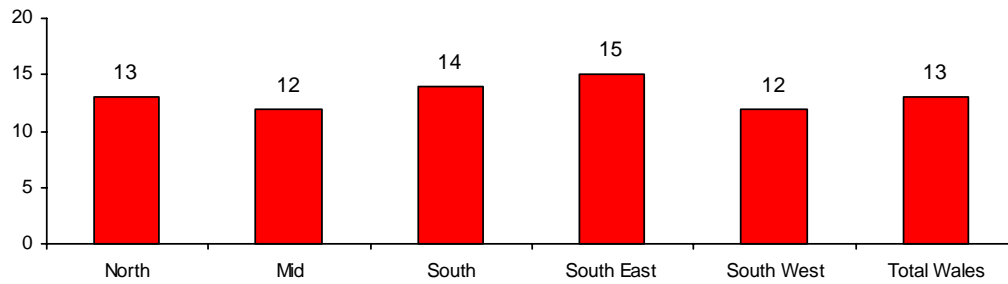
On a monthly basis, the proportion of overseas guests in 2005 was very similar to 2004. The biggest difference in the proportion of overseas visitors was recorded in March and May. In both these months, the proportion of overseas visitors increased by 3 percentage points from the same months in 2004.

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

	% of overseas guests								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
January	13	13	15	13	11	9	7	10	9
February	13	11	10	9	7	9	5	7	6
March	16	16	17	13	10	10	7	9	12
April	21	23	19	16	12	11	8	10	10
May	24	22	22	17	12	15	12	13	16
June	29	27	24	22	16	16	14	14	16
July	33	29	27	24	16	18	15	17	16
August	25	22	24	19	14	14	10	14	14
September	24	22	23	17	13	12	11	13	14
October	22	18	18	14	15	11	8	10	11
November	16	14	18	13	10	8	10	9	7
December	19	12	13	17	8	11	6	7	8
Annual Average	22	20	20	18	13	13	10	12	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 12-15%, with the South East recording the highest proportion of overseas occupants.

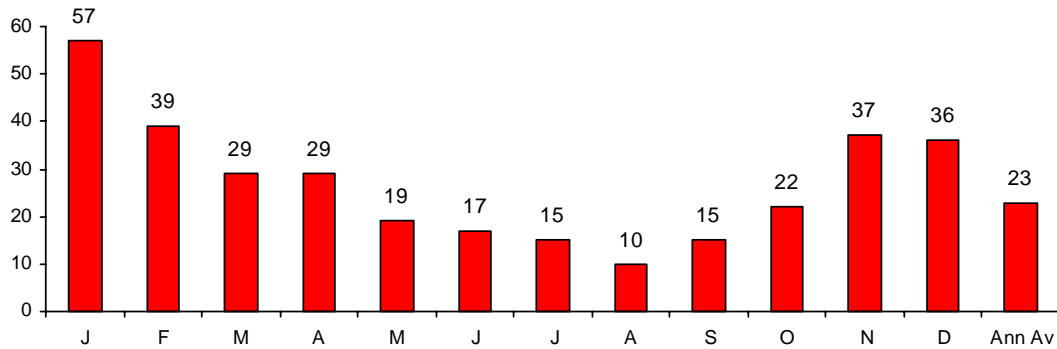
Figure C-5 - Guest Houses/B&Bs - Percentage of Overseas Guests by Region – 2005 (%)



Percentage of Business Guests

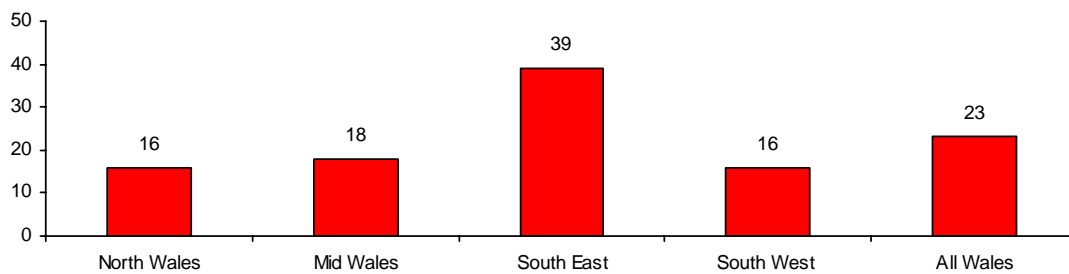
As with hotels, guest house and bed and breakfast operators were also asked from February 2001, to record the number of guests staying for business purposes.

Figure C-6 - Guest Houses/B&Bs - Percentage of Business Guests – 2005 (%)



The annual average proportion of business guests in bed and breakfast and guest house establishments in 2005 was 23%. The percentage of business guests was at its highest in January (57%). In contrast, the proportion of business guests was lowest during the peak summer month of August (10%).

Figure C-7 - Guest Houses/B&BS – Annual Average Percentage of Business Guests by Region – 2005 (%)



As with previous years, the percentage of business guests in the South East was significantly higher in 2005 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

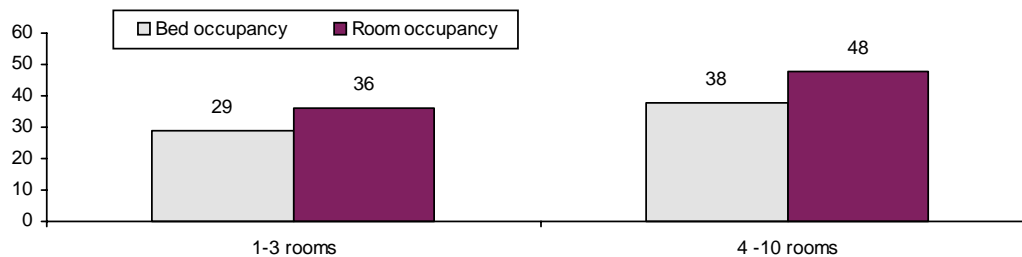
This section of the report looks in more detail at different types of guest house and bed and breakfast establishments who contributed to the survey and the impact, if any, of these factors have on levels of bed and room occupancy.

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 - 2005 (%)



Similar to the hotel sector, 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 12 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								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
1-3 rooms	34	34	35	32	26	33	34	36	36
4-10 rooms	42	40	41	40	36	45	45	48	48

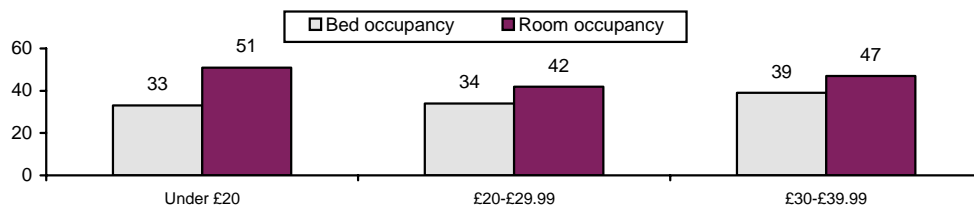
Bed and room occupancy rates for establishments with 1-3 rooms and 4-10 rooms in 2005 were identical to 2004 which were the highest recorded over the period since 1997.

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 under £40.

Figure C-9 below presents annual bed and room occupancy figures by tariff for 2005.

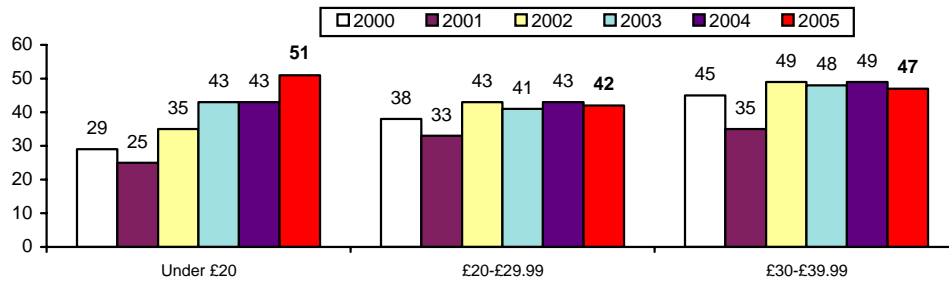
Figure C-9- Annual Occupancy by Tariff of Guest House/B&B – 2005 (%)



There is no positive relationship between tariff and occupancy levels. For example, bed occupancy was highest amongst establishments in the most expensive tariff band (£30-£39.99) while room occupancy levels were highest amongst those charging under £20.

Figure C-10 overleaf shows the annual average bed occupancy rates by tariff between 2000 and 2005. 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 2005, the annual room occupancy rates for establishments charging £20-29.99 and £30-39.99 have remained relatively consistent over the last four years. Room occupancy has increased amongst establishments charging under £20 but due to the small sample sizes involved, these results should be treated with some degree of caution.

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, 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. The second highest rates in 2005 were recorded by establishments located in seaside areas - annual bed and room occupancy rates were 38% and 47% respectively.

Figure C-11 - Annual Occupancy by Location of Guest House/B&B - 2005(%)

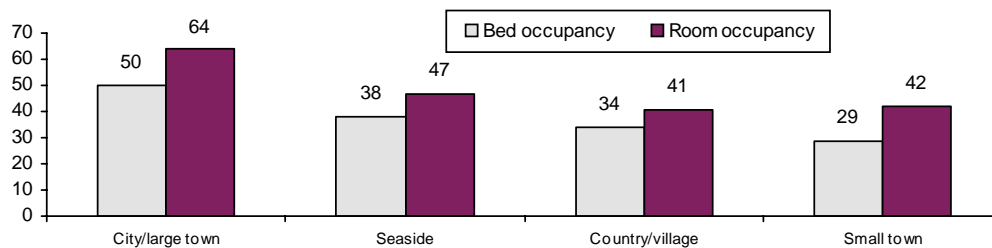


Table C-5- Trends in Annual Room Occupancy Rates by Location of Guest House/B&B (%)

	Annual Average Room Occupancy								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
City/large town	*	*	*	*	55	67	70	63	64
Small town	40	38	40	37	28	43	39	38	42
Seaside	41	42	43	39	39	37	44	46	47
Country/village	34	33	34	33	27	41	40	41	41

* Data not available due to change in bands for analysis

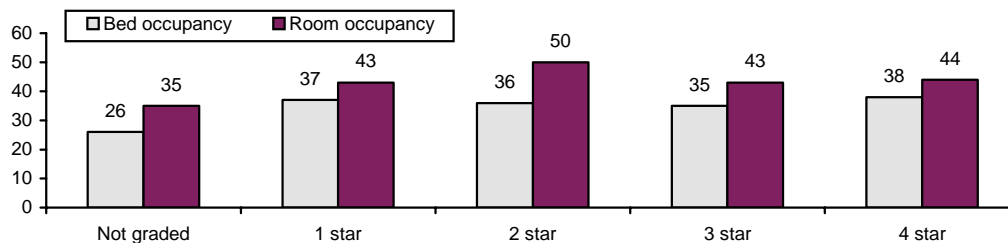
In 2005, establishments located in seaside locations recorded their highest annual room occupancy rates over the last nine years.

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 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.

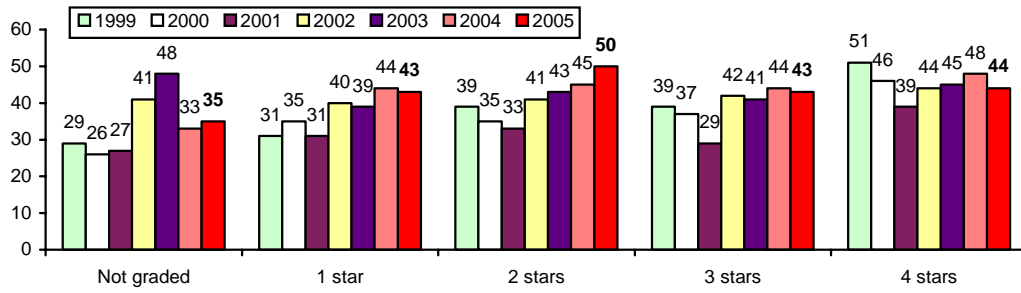
Figure C-12 -Occupancy by Grading of Guest House/B&B- 2005 (%)



Graded establishments had higher bed and room occupancy levels than those with no grading. However, there was not a positive relationship with the level of star grading in the scheme and occupancy levels. For example, room occupancy levels for 2 star establishments were highest while 4 star establishments had the highest bed occupancy levels.

As shown in figure C-13 overleaf, the annual room occupancy rates in 2005 for 2 star establishments and non graded establishments were slightly higher than those recorded in 2004. 1, 3 and 4 star graded establishments experienced a slight decrease in their room occupancy levels.

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.

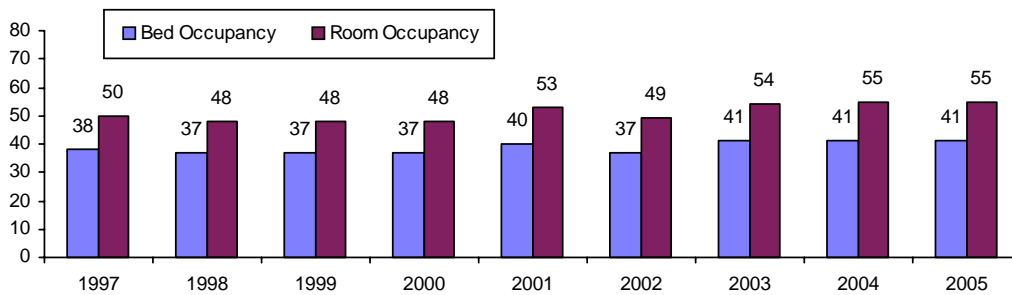
D All Serviced Accommodation

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

Annual Average Bed and Room Occupancy

In 2005, there was no change in annual average bed and room occupancy levels for all types of serviced accommodation to those recorded in 2004, which were the highest recorded over the period since 1997.

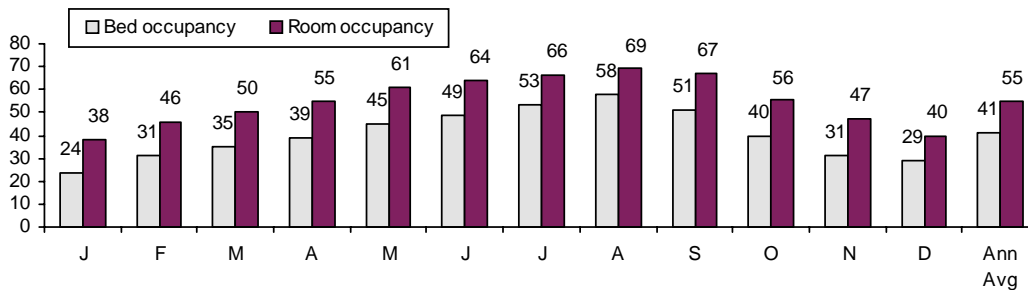
Figure D-1- Serviced Accommodation - Trends in Occupancy Rates - Annual Averages (%)



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 - 2005 (%)

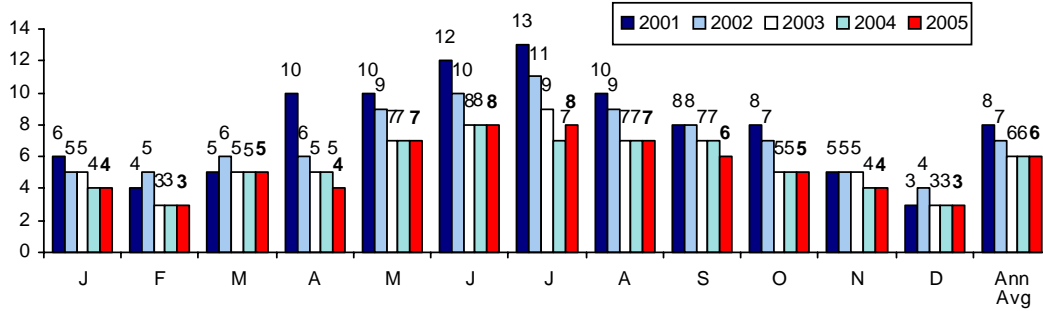


Both bed and room occupancy levels were at their highest during the main tourist season, peaking at 58% and 69% respectively in August 2005.

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 – 2005 (%)



The proportion of overseas guests in most months was the same in 2005 as in 2004. The only exceptions were April and September (both decreased 1 percentage point) and July, which increased by 1 percentage point. Reflecting these results the overall average in 2005 was the same as in 2004 (6%) but lower than the comparative figures recorded in 2001 and 2002.

Appendix 1: Monthly Forms

Appendix 2: Hotels

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

	Bed Occupancy								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
January	20	22	21	21	22	23	25	24	25
February	30	31	28	29	31	33	33	33	33
March	37	31	31	31	31	37	36	36	37
April	38	39	38	41	39	37	43	41	41
May	48	47	43	43	47	45	48	48	46
June	48	47	47	46	48	50	47	48	49
July	56	53	53	53	52	51	52	53	52
August	62	58	57	57	60	58	59	56	56
September	50	50	50	48	49	48	50	51	51
October	42	40	41	41	43	42	43	42	42
November	33	31	32	33	40	35	34	35	34
December	29	27	27	30	32	30	31	33	32
Annual Average	43	42	40	39	41	41	42	42	42

Appendix 2b - Hotels: Bed Occupancy 2005 (%)

	2005 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	25	33	37	41	46	49	52	56	51	42	34	32	42
North Wales	25	30	35	39	49	51	54	59	53	41	34	31	42
Mid Wales	24	31	35	39	43	46	53	57	50	43	32	31	41
South Wales	26	35	39	43	45	48	51	54	50	41	34	32	42
South East Wales	28	37	39	43	45	46	48	48	48	43	35	33	41
South West Wales	23	32	38	41	45	50	55	65	54	39	32	30	43
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	23	28	32	33	43	46	52	61	49	37	24	28	38
11-25 rooms	23	29	31	38	43	46	51	55	50	38	30	29	39
26-50 rooms	25	34	37	39	43	43	47	53	45	39	31	30	39
51-100 rooms	27	37	45	46	50	56	55	60	57	46	39	37	47
Over 100 rooms	31	41	45	50	56	58	62	59	57	52	45	38	49
Under £20	*	*	*	*	*	*	*	*	*	*	*	*	*
£20-£29.99	27	27	17	28	35	40	43	52	41	23	26	22	32
£30-£39.99	18	26	33	39	41	45	49	52	47	37	28	25	36
£40-£49.99	27	37	40	47	50	52	56	56	55	40	37	32	44
£50-£59.99	20	31	36	38	48	47	50	50	52	44	31	30	39
£60 & over	30	36	39	42	47	50	54	59	52	45	35	34	44
Not graded	15	20	21	29	37	38	33	44	36	24	22	17	27
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	27	36	39	42	46	50	55	60	52	40	35	37	44
3 stars	25	33	36	41	47	49	52	55	51	42	34	31	41
4 stars	31	33	40	42	47	49	55	59	53	45	36	36	44
5 stars	*	33	41	40	49	53	55	60	63	44	*	*	46
City/large town	30	41	42	45	48	48	52	54	53	50	42	38	45
Countryside/village	24	30	34	40	44	48	52	54	49	41	32	32	40
Seaside	26	36	38	41	49	52	54	64	55	39	34	33	44
Small town	24	30	33	38	45	47	50	51	48	40	31	27	39

* Sample size too small to undertake an analysis

Appendix 2c - Hotels: Room Occupancy 2005 (%)

	2005 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	39	48	52	57	63	65	67	69	68	58	50	43	57
North Wales	37	43	45	51	62	66	67	69	68	53	47	41	54
Mid Wales	35	40	44	51	54	60	65	65	64	55	44	39	52
South Wales	42	55	58	64	65	66	67	69	71	61	53	46	60
South East Wales	44	59	59	65	67	67	66	64	69	63	54	47	60
South West Wales	38	48	57	62	62	65	69	77	72	59	52	44	59
1-3 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
4-10 rooms	31	35	39	43	53	57	60	67	59	45	34	38	47
11-25 rooms	37	43	43	51	57	59	63	64	65	52	44	39	52
26-50 rooms	39	50	52	58	62	62	64	69	65	57	50	43	56
51-100 rooms	39	51	61	61	66	72	69	73	75	62	50	46	60
Over 100 rooms	49	61	64	72	77	79	79	75	79	72	68	52	69
Under £20	*	*	*	*	*	*	*	*	*	*	*	*	*
£20-£29.99	41	34	22	38	46	54	57	63	55	32	42	33	44
£30-£39.99	31	42	48	56	58	57	60	63	63	54	42	34	50
£40-£49.99	37	47	51	59	63	67	70	68	70	54	52	43	57
£50-£59.99	34	49	50	56	68	65	69	67	74	67	48	44	57
£60 & over	45	52	57	60	64	68	68	71	70	61	52	46	60
Not graded	34	34	30	41	51	51	44	53	49	34	32	22	39
1 star	*	*	*	*	*	*	*	*	*	*	*	*	*
2 stars	37	49	52	57	59	61	69	71	67	54	46	47	56
3 stars	39	49	51	58	64	67	68	69	70	60	51	43	57
4 stars	45	50	58	61	64	65	67	70	68	59	52	47	59
5 stars	*	41	52	45	55	60	58	63	69	50	*	*	53
City/large town	50	65	67	68	72	69	73	72	78	73	65	53	67
Countryside/village	36	43	47	55	59	63	64	65	65	54	47	42	53
Seaside	36	47	50	55	63	65	66	74	70	54	47	43	56
Small town	41	47	52	58	63	67	68	66	67	58	47	39	56

* Sample size too small to undertake an analysis

Appendix 2d - Hotels: Bed Occupancy by Unitary Authority Areas 2005 (%)

	2005 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Group A Cardiff Vale of Glamorgan	36	48	48	53	53	54	58	53	55	53	53	45	51
Group B Newport Monmouthshire Torfaen Blaenau Gwent Caerphilly	23	32	33	37	41	42	46	45	45	37	29	27	36
Group C Rhondda Cynon Taff Bridgend Merthyr Tydfil	24	34	34	36	41	36	40	45	40	34	23	28	34
Group D Neath & Port Talbot Swansea	31	40	42	38	47	52	53	51	55	39	30	34	43
Group E Carmarthenshire Pembrokeshire	21	29	35	41	45	50	56	67	53	40	32	29	42
Group F Ceredigion	17	29	31	45	44	48	56	58	*	*	*	*	40
Group G Powys	23	29	32	35	38	41	47	49	43	40	31	31	37
Group H Denbighshire Flintshire Wrexham	22	28	31	35	37	39	44	42	41	36	34	34	35
Group I Conwy	26	31	35	40	49	52	55	62	54	43	33	33	43
Group J Gwynedd Anglesey	28	34	40	43	58	62	63	70	62	46	35	27	48

Appendix 2e - Hotels: Room Occupancy by Unitary Authority Areas 2005 (%)

	2005 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
Group A Cardiff Vale of Glamorgan	52	67	70	76	76	79	76	69	78	75	78	60	71
Group B Newport Monmouthshire Torfaen Blaenau Gwent Caerphilly	42	54	53	62	64	66	66	66	68	60	49	42	57
Group C Rhondda Cynon Taff Bridgend Merthyr Tydfil	38	56	53	56	60	53	53	60	59	49	38	40	51
Group D Neath & Port Talbot Swansea	45	64	67	60	65	70	73	65	75	62	53	50	62
Group E Carmarthenshire Pembrokeshire	35	42	51	58	60	63	67	78	70	58	49	41	56
Group F Ceredigion	31	43	47	60	58	61	68	67	*	*	*	*	54
Group G Powys	34	37	42	49	51	57	60	59	58	54	44	40	49
Group H Denbighshire Flintshire Wrexham	38	44	43	46	51	54	58	52	57	49	50	48	49
Group I Conwy	35	38	43	49	61	64	66	71	67	54	44	41	54
Group J Gwynedd Anglesey	39	48	52	58	72	77	77	81	78	57	47	34	61

Appendix 3: Guest Houses and Bed & Breakfasts

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

	Bed Occupancy								
	1997	1998	1999	2000	2001	2002	2003	2004	2005
January	9	12	10	11	10	15	13	14	17
February	16	18	13	18	15	19	20	21	21
March	23	18	19	19	9	27	23	21	27
April	24	28	28	31	20	25	37	36	30
May	37	38	36	34	29	36	43	41	39
June	38	37	38	40	32	48	41	47	47
July	49	46	50	48	44	51	50	54	53
August	61	60	61	61	54	62	63	64	64
September	38	39	38	37	34	43	42	46	48
October	29	25	28	26	25	32	30	34	33
November	18	14	18	13	16	22	21	20	17
December	14	11	15	13	12	17	17	18	14
Annual Average	31	30	31	30	26	34	34	35	35

Appendix 3b - Guest houses/bed & breakfasts: Bed Occupancy 2005 (%)

	2005 Monthly bed occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	17	21	27	30	39	47	53	64	48	33	17	14	35
North Wales	12	19	25	26	39	47	58	71	49	31	16	13	35
Mid Wales	11	14	22	26	32	36	44	53	38	28	16	10	29
South Wales	22	25	32	35	43	52	55	65	51	38	18	16	39
South East Wales	24	28	33	40	44	51	54	58	55	42	20	16	39
South West Wales	19	22	31	30	42	52	56	72	48	33	15	16	39
1-3 rooms	12	18	22	24	34	38	47	54	40	28	15	13	29
4-10 rooms	19	22	30	33	42	51	56	69	52	36	17	15	38
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
51-100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Over 100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Under £20	25	24	32	33	37	39	37	51	*	*	*	*	33
£20-£29.99	16	21	26	29	37	44	52	61	46	33	18	14	34
£30-£39.99	18	23	31	31	46	54	61	73	47	33	14	16	39
£40-£49.99	*	*	*	*	*	56	*	70	*	*	*	*	*
£50-£59.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£60 & over	*	*	*	*	*	*	*	*	*	*	*	*	*
Not graded	11	12	19	24	27	34	40	49	32	24	18	14	26
1 star	21	21	28	33	45	39	53	55	48	33	*	*	37
2 stars	22	25	28	34	38	45	51	64	47	40	19	15	35
3 stars	16	21	29	28	39	47	54	64	47	31	15	14	35
4 stars	13	19	26	31	44	56	60	71	55	34	13	6	37
5 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
City/large town	35	39	47	50	51	61	60	64	62	*	*	*	49
Countryside/village	13	18	25	30	38	45	51	63	48	34	16	14	34
Seaside	14	21	29	23	38	51	62	79	51	29	15	16	38
Small town	21	21	24	30	42	39	45	45	35	29	19	12	29

* Sample size too small to undertake an analysis

Appendix 3c - Guest houses/bed & breakfasts: Room Occupancy 2005 (%)

	2005 Monthly room occupancy												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
All Wales	26	29	36	40	49	56	63	72	59	41	24	20	44
North Wales	21	26	34	36	48	56	67	79	64	40	24	20	44
Mid Wales	18	20	25	32	38	43	52	59	44	32	22	14	34
South Wales	32	36	42	46	54	62	67	74	64	47	27	22	49
South East Wales	33	40	45	52	56	63	66	71	69	52	33	24	51
South West Wales	29	31	39	40	52	62	67	77	59	42	21	21	47
1-3 rooms	19	24	27	33	40	44	55	60	48	33	22	17	36
4-10 rooms	30	32	40	43	53	62	68	77	65	45	26	21	48
11-25 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
26-50 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
51-100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Over 100 rooms	*	*	*	*	*	*	*	*	*	*	*	*	*
Under £20	40	25	46	49	55	62	60	71	*	*	*	*	51
£20-£29.99	24	30	35	39	46	52	62	69	58	40	26	19	42
£30-£39.99	31	33	37	39	52	63	69	77	60	40	21	20	47
£40-£49.99	*	*	*	*	*	67	*	79	*	*	*	*	*
£50-£59.99	*	*	*	*	*	*	*	*	*	*	*	*	*
£60 & over	*	*	*	*	*	*	*	*	*	*	*	*	*
Not graded	19	16	26	35	38	44	52	58	44	39	31	24	35
1 star	29	29	28	39	48	44	62	62	58	34	*	*	43
2 stars	33	39	46	49	53	60	68	77	65	54	33	22	50
3 stars	25	29	36	37	47	56	63	71	58	39	22	19	43
4 stars	21	25	32	39	53	63	67	77	63	38	15	8	44
5 stars	*	*	*	*	*	*	*	*	*	*	*	*	*
City/large town	47	53	60	68	67	77	74	79	76	*	*	*	64
Countryside/village	21	24	32	37	45	52	60	69	56	39	21	17	41
Seaside	24	30	36	35	47	61	69	83	63	36	21	21	47
Small town	32	33	32	42	55	53	61	61	51	44	33	21	42

* Sample size too small to undertake an analysis

