SELF-CATERING SURVEY
IN WALES

2005

ANNUAL REPORT

Prepared for: BWRDD CROESO CYMRU WALES TOURIST BOARD

Contact : Dr Birgitte Magnussen

Prepared by: **Beaufort Research**

Contact : Peter Stolle/ Osian Bowyer

2 Museum Place
Cardiff
CF10 3BG

Tel: 029 2037 8565
Fax: 029 2037 0600
E-mail: clare@beaufortresearch.co.uk
Website: www.beaufortresearch.co.uk

B2520 / CPeate-PHS / March 2005

TERMS OF CONTRACT

Unless otherwise agreed, the findings of this study remain the copyright of Beaufort Research Ltd and may not be quoted, published or reproduced without the company's advance approval.

Approval to quote or publish will only be withheld on the grounds of inaccuracy or misrepresentation.

Any approved publication must detail: Beaufort Research Ltd as provider, sample size and field dates.

CONTENTS PAGE

1. INTRODUCTION

Background

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

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

Research Approach

The survey has been conducted by Beaufort Research throughout the period 1987-2004, in accordance with the specification provided by the WTB Research and Corporate Planning Department.

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

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

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

The Reporting Cycle

The purpose of the survey is to measure monthly levels of demand, although it is measured according to a four or five week cycle. Thus Bank Holidays and monthly reporting periods are not static from year to year, and on occasion, it is possible for Bank Holidays to "move" from one reporting period to another over seasons. This movement of Bank Holidays can lead either to artificial year on year differences being recorded or to real movements being masked. Movements of public holidays should be borne in mind when interpreting the data at a monthly level. In 2005, Easter fell in the March reporting period, the May Bank Holiday and the Spring Bank Holiday fell in the May reporting period, and the August Bank holiday fell in the August reporting period.

The Report

This report brings together all of the 2005 survey findings, accompanied by a brief technical explanation.

2. *SELF CATERING AGENCIES*

In 2004, there was difficulty in obtaining reliable samples of Self-Catering Agencies (letting agencies offering self catering cottages and apartments in Wales).

For this reason, it is not possible at this time to report on findings from the Self-Catering Agencies here.

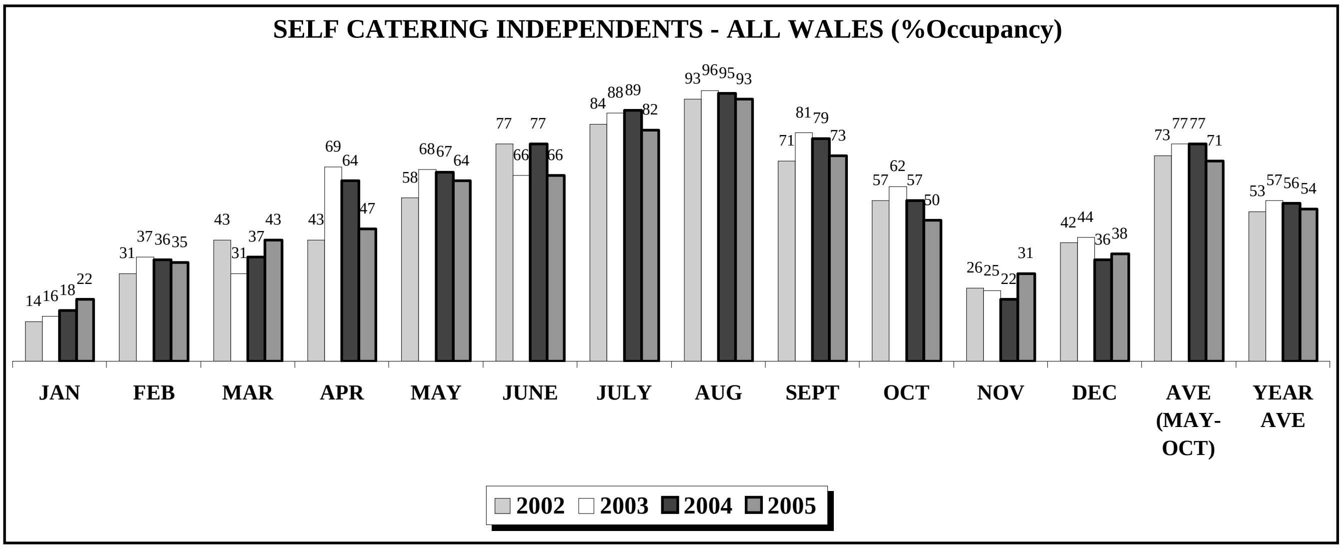
It is hoped that various activities undertaken by Beaufort Research and WTB in 2006 will enable Agency data to be reported for 2006.

3. SELF CATERING INDEPENDENT OPERATORS

This section summarises the information obtained from a sample of verified independent self-catering operators offering self-catering cottages and apartments in Wales. The sample was designed to be broadly representative of the range of furnished accommodation let through such independent operators. Occupancy is measured at the individual property level by expressing the number of weeks let each month as a proportion of the weeks and units available for rent.

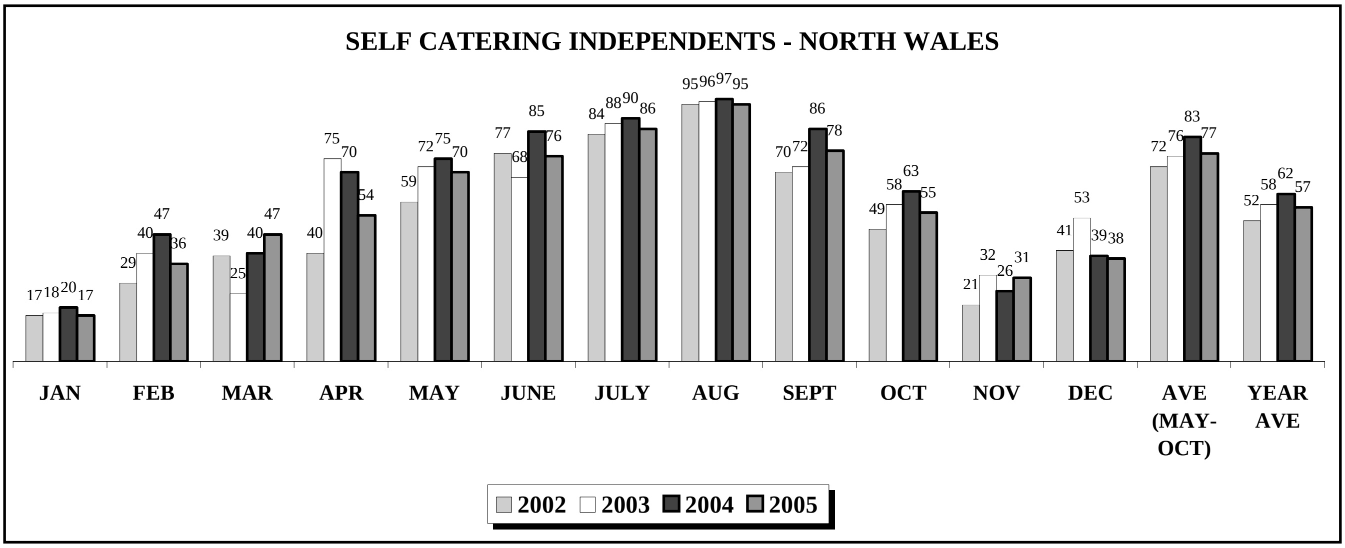
Key Findings

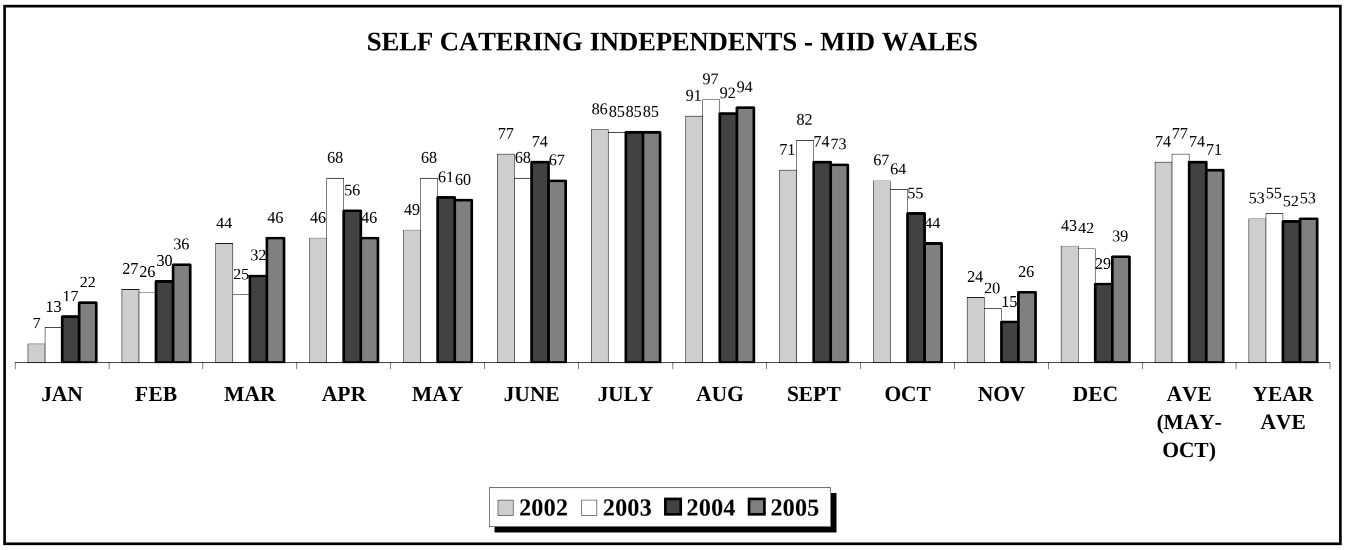
The 2005 average occupancy rate for self-catering properties has continued the slight decline, which has been a trend since 2003 – dropping from 57% in 2003 to 54% in 2005.

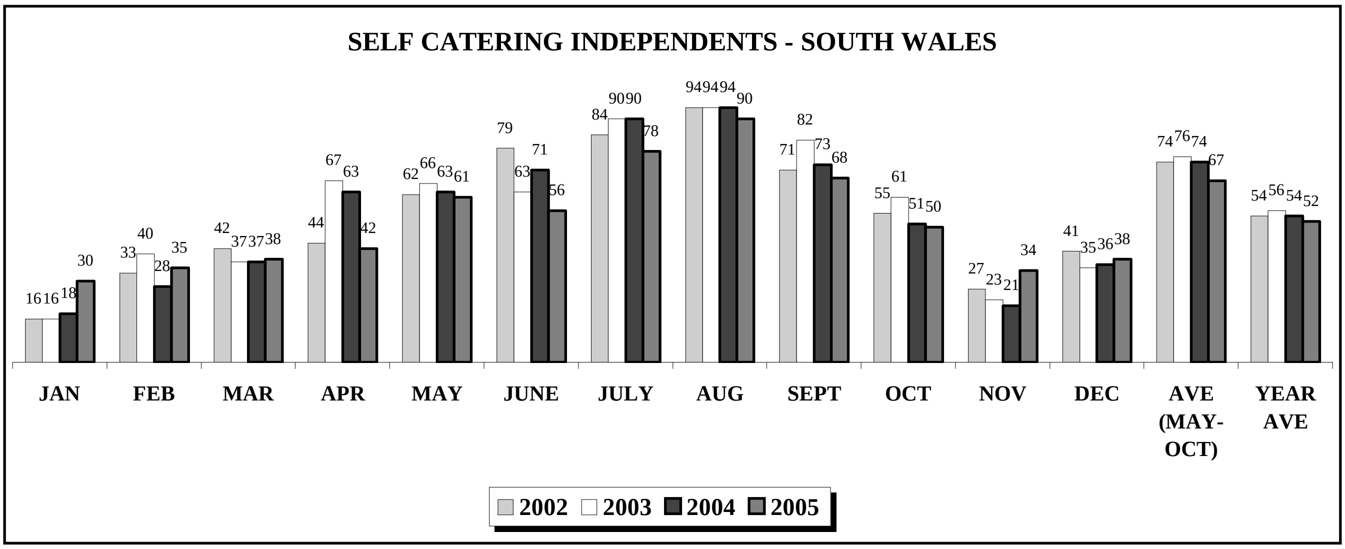


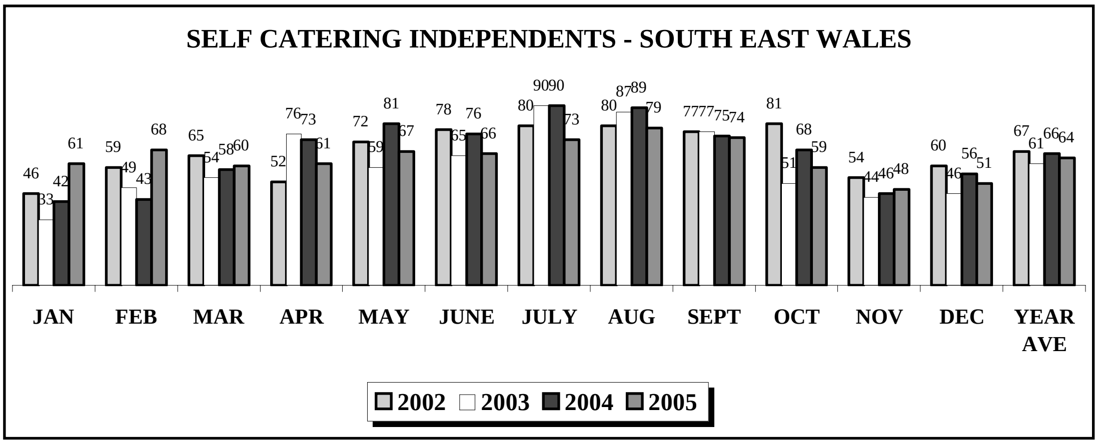
Regional Trends

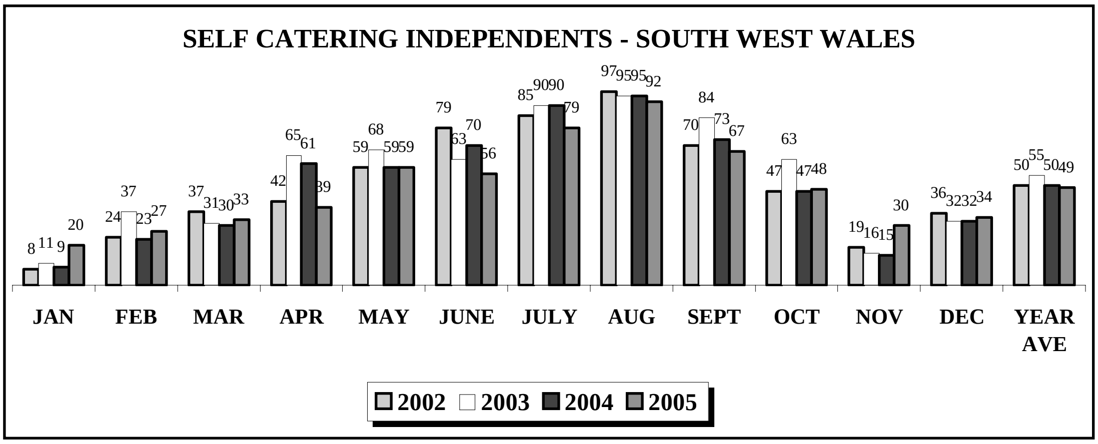
North Wales levels of occupancy have declined 5% since 2004 to 57%. Mid Wales has shown just a 1% increase to 53% overall, however occupancy figures for January to March in this region are at their highest levels since 2002. Meanwhile South Wales overall has shown a slight decline to 52%.


SELF CATERING INDEPENDENTS - NORTH WALES
17 18 20 17
29 40 47 36
39 25 40 47
40 75 70 54
59 72 75 70
77 68 85 76
84 88 90 86
95 96 97 95
70 72 86 78
49 58 63 55
21 32 26 31
41 53 39 38
72 76 83 77
52 58 62 57
JAN
FEB
MAR
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
NOV
DEC
AVE (MAY-OCT)
YEAR AVE
2002 2003 2004 2005


SELF CATERING INDEPENDENTS - MID WALES
7 13 17 22
27 26 30 36
44 25 32 46
46 68 56 46
49 68 61 60
77 68 74 67
86 85 85 85
91 97 92 94
71 82 74 73
67 64 55 44
24 20 15 26
43 42 29 39
74 77 74 71
53 55 52 53
JAN
FEB
MAR
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
NOV
DEC
AVE (MAY-OCT)
YEAR AVE
2002 2003 2004 2005

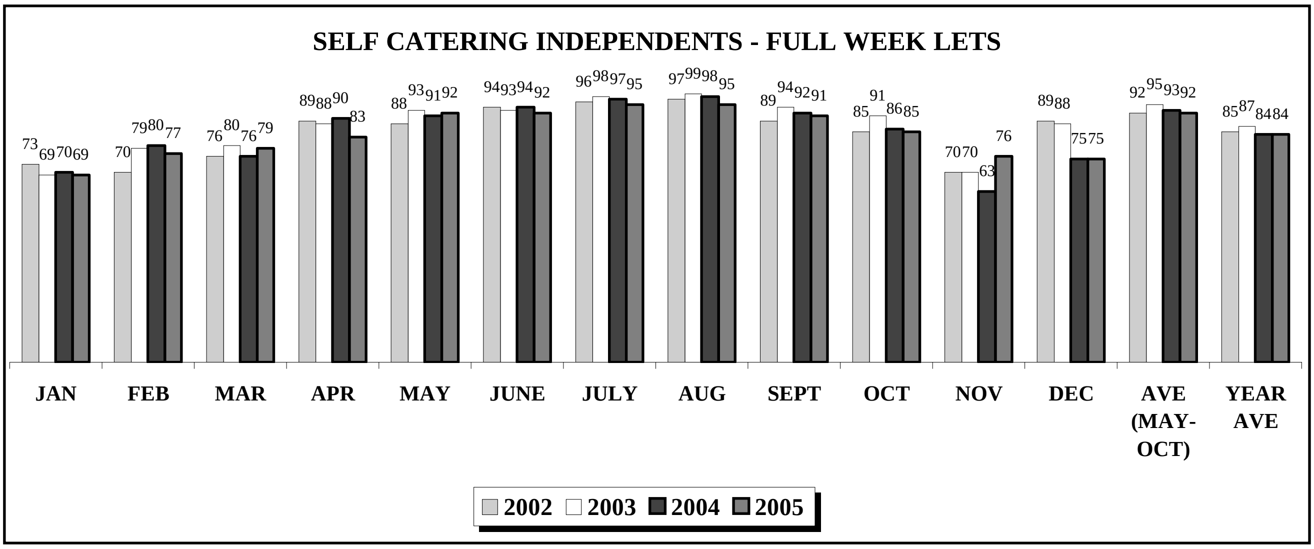

SELF CATERING INDEPENDENTS - SOUTH WALES
16 16 18 30
33 40 28 35
42 37 37 38
44 67 63 42
62 66 63 61
79 63 71 56
84 90 90 78
94 94 94 90
71 82 73 68
55 61 51 50
27 23 21 34
41 35 36 38
74 76 74 67
54 56 54 52
JAN
FEB
MAR
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
NOV
DEC
AVE (MAY-OCT)
YEAR AVE
2002 2003 2004 2005





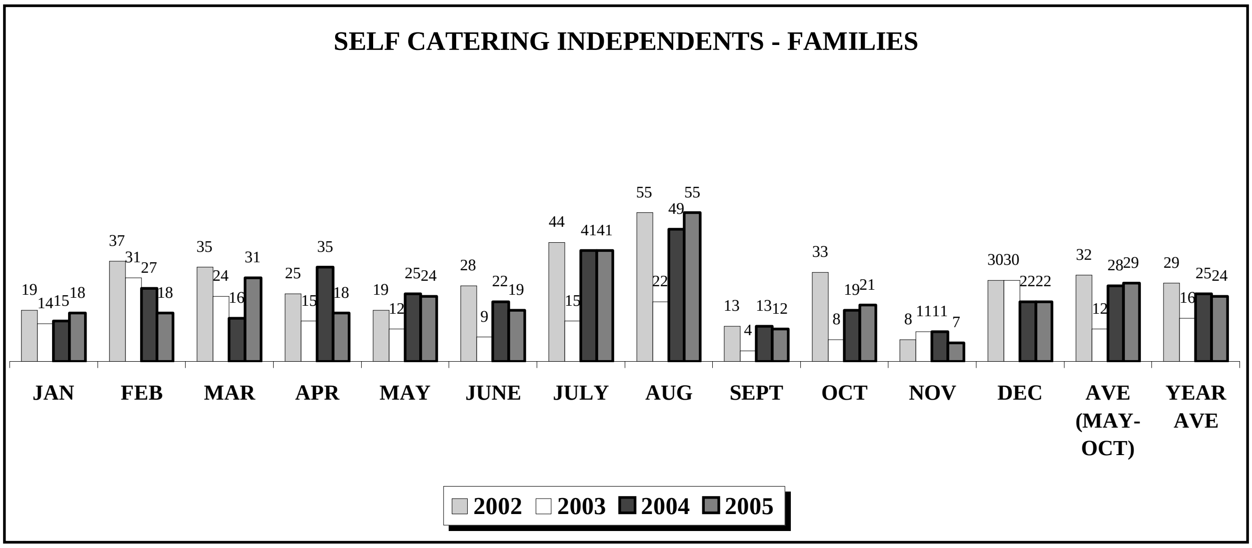
Full week lets

As in 2004, 84% of self catering occupancy was on a full week basis in 2005. Full week occupancy was at its lowest in 2005 in the months of January (69%) and December (75%).



The Family Market

The proportion let to families over the whole year in 2005 was 24% - a 1% decrease from 2004.



Overseas visitors %

The proportion of overseas visitors has remained the same in 2005 as it was in the previous year at 5%.

	Jan	*Feb*	*March*	*April*	*May*	*June*	*July*
2005	8	6	4	7	5	6	9
2004	5	2	6	3	5	6	6
2003	5	2	3	2	2	3	3
2002	2	3	4	3	3	5	8

	Aug	*Sep*	*Oct*	*Nov*	*Dec*	*Average (May-Oct)*	*Year Ave*
2005	4	4	3	5	4	5	5
2004	4	4	4	6	7	5	5
2003	2	1	1	3	2	2	2
2002	4	5	8	12	10	6	6

Coastal/Inland %

The average yearly occupancy in 2005 for coastal locations is down 2% on the previous year to 54%. For Inland locations the 2005 figure is down by a greater amount - 5% on the previous year to 52%.

Coastal Locations

	Jan	***Feb***	***March***	***April***	***May***	***June***	***July***
2005	16	32	41	49	66	70	86
2004	14	36	33	65	68	79	91
2003	11	35	25	70	68	73	88
2002	10	23	38	40	57	79	85

	Aug	***Sep***	***Oct***	***Nov***	***Dec***	***Average (May-Oct)***	***Year Ave***
2005	93	78	52	32	37	74	54
2004	96	83	56	18	31	79	56
2003	96	73	60	24	45	76	57
2002	96	69	55	15	37	74	50

Inland Locations

	Jan	***Feb***	***March***	***April***	***May***	***June***	***July***
2005	30	40	47	45	60	59	77
2004	24	35	41	62	67	74	85
2003	22	38	38	69	68	63	88
2002	19	39	48	47	59	76	83

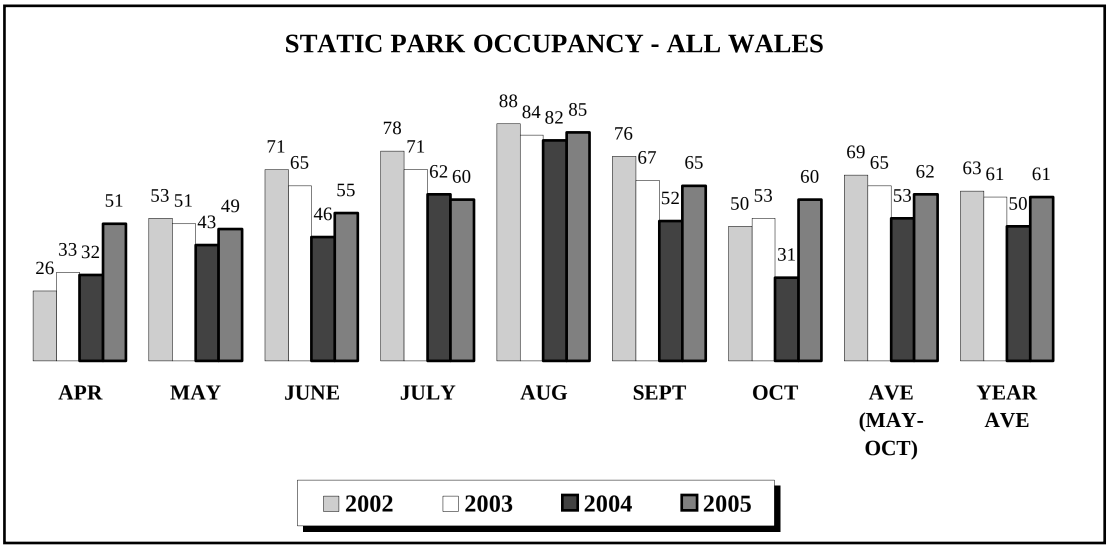
	Aug	***Sep***	***Oct***	***Nov***	***Dec***	***Average (May-Oct)***	***Year Ave***
2005	92	63	47	28	40	66	52
2004	92	72	58	28	43	75	57
2003	96	83	63	28	43	77	58
2002	89	73	59	36	47	73	56

4. STATIC PARKS

In this section we report on the information obtained from operators offering static caravans (and/or chalets) for let. Occupancy is measured by relating the number of units let during the reporting period to the total number available for let during that time.

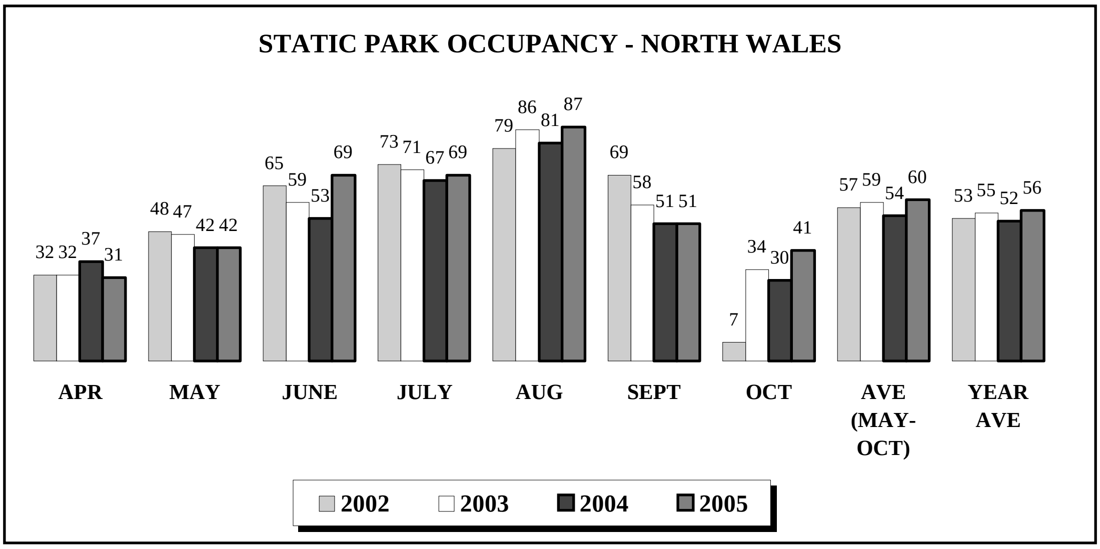
Key Findings

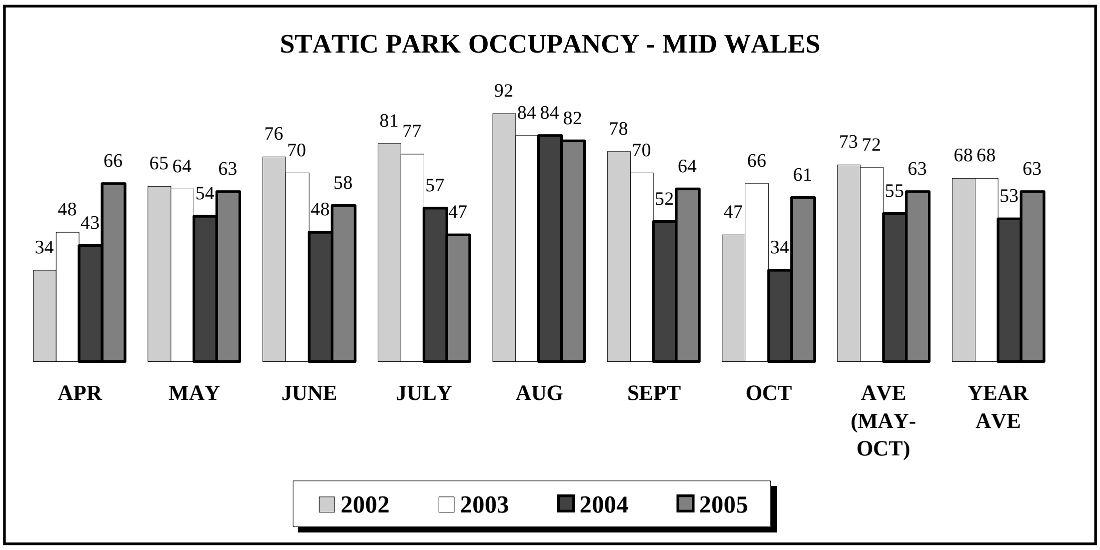
Occupancy levels in 2005 for static parks has reversed a trend of continued three year decline with occupancy increasing from 50% in 2004 to 61% in 2005. The most marked increase occurs in the start of the season with 51% occupancy in April in 2005, compared to 32% the previous year.

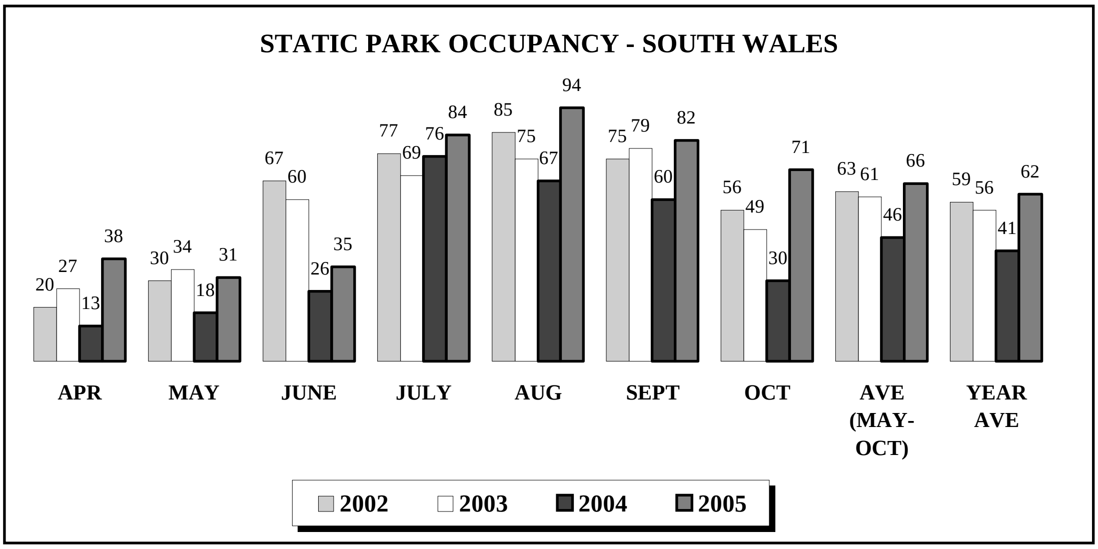


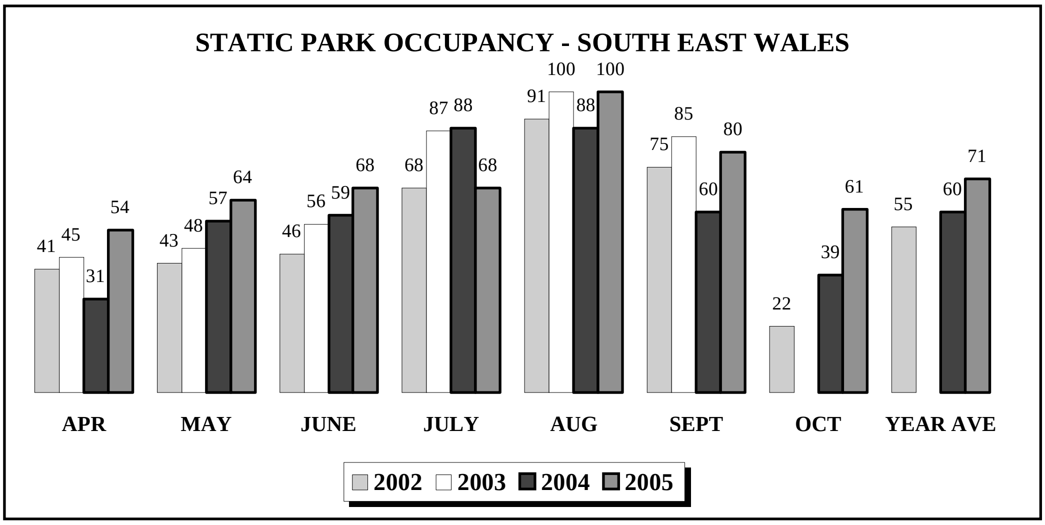
Regional Trends

Occupancy levels in all three regions (Mid, North and South Wales) have increased since 2004. These increases were most marked in South East and South West Wales which saw increases of 11% and 21% respectively.

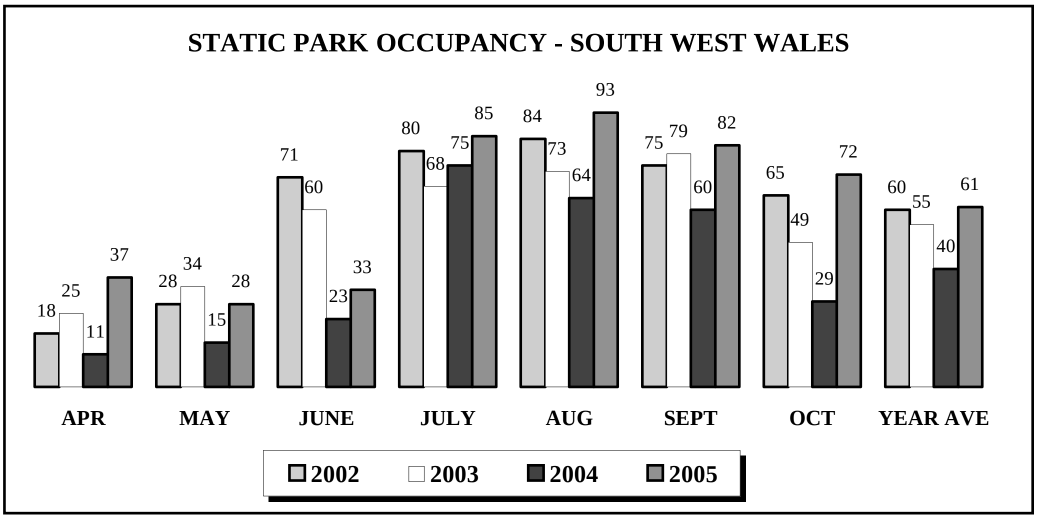

STATIC PARK OCCUPANCY - NORTH WALES
32 32 37 31
48 47 42 42
65 59 53 69
73 71 67 69
79 86 81 87
69 58 51 51
7 34 30 41
57 59 54 60
53 55 52 56
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
AVE (MAY-OCT)
YEAR AVE
2002
2003
2004
2005


STATIC PARK OCCUPANCY - MID WALES
34 48 43 66
65 64 54 63
76 70 48 58
81 77 57 47
92 84 84 82
78 70 52 64
47 66 34 61
73 72 55 63
68 68 53 63
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
AVE (MAY-OCT)
YEAR AVE
2002
2003
2004
2005


STATIC PARK OCCUPANCY - SOUTH WALES
20 27 13 38
30 34 18 31
67 60 26 35
77 69 76 84
85 75 67 94
75 79 60 82
56 49 30 71
63 61 46 66
59 56 41 62
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
AVE (MAY-OCT)
YEAR AVE
2002
2003
2004
2005

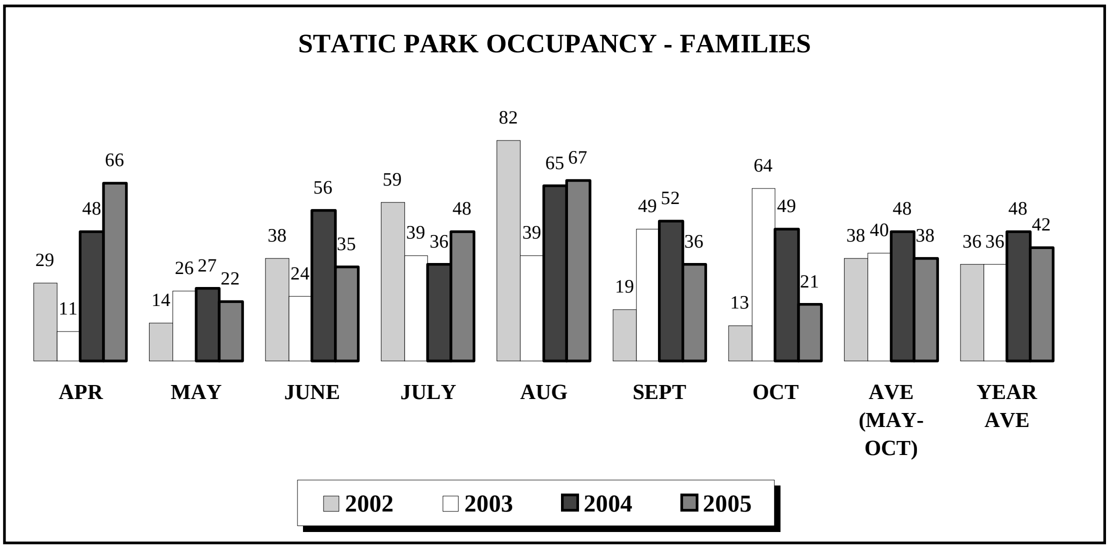


NB: No October returns for SE Wales in 2003, hence a year average has not been calculated.



The Family Market

Occupation of static parks by families in 2005 has shown a slight decrease since the previous year, decreasing from 48% to 42%. However, occupancy levels at the beginning of the season in April are at their highest since 2002, currently at 66%.



Static Parks: Overseas visitors %

In 2005 the proportion of overseas visitors over the year as a whole, has remained the same as in 2003 and 2004 (4%).

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	7	1	5	6	7	4	1	4	4
2004	1	1	7	2	9	4	1	4	4
2003	2	2	4	5	10	4	2	5	4
2002	0	1	5	2	2	0	0	2	1

Static Parks: Inland/Coastal %

Both coastal and inland static park locations show an increase in occupancy levels since 2004, due in part to much higher occupancy levels at the end of the season in October (29% higher in coastal locations than the previous year, 20% higher in inland locations).

Coastal Locations %

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	51	49	55	60	84	68	61	63	61
2004	32	44	46	63	83	53	32	54	50
2003	33	52	66	74	84	67	54	66	61
2002	26	54	77	82	90	78	57	73	66

Inland Locations %

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	36	46	52	58	93	54	48	59	55
2004	30	32	45	53	70	43	28	45	43
2003	28	35	49	65	75	65	28	53	49
2002	25	35	40	56	74	55	21	47	44

Static Parks: Grading %

Occupancy at 4-5 star static park sites has increased 8% to 76% in 2005 while occupancy of 1-3 star sites has increased by 7% to 57%.

1-3 Stars %

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	68	50	43	45	81	59	54	55	57
2004	23	46	43	62	90	56	29	54	50
2003	26	53	72	78	86	73	63	71	64
2002	17	52	71	81	90	76	39	68	61

4-5 Stars %

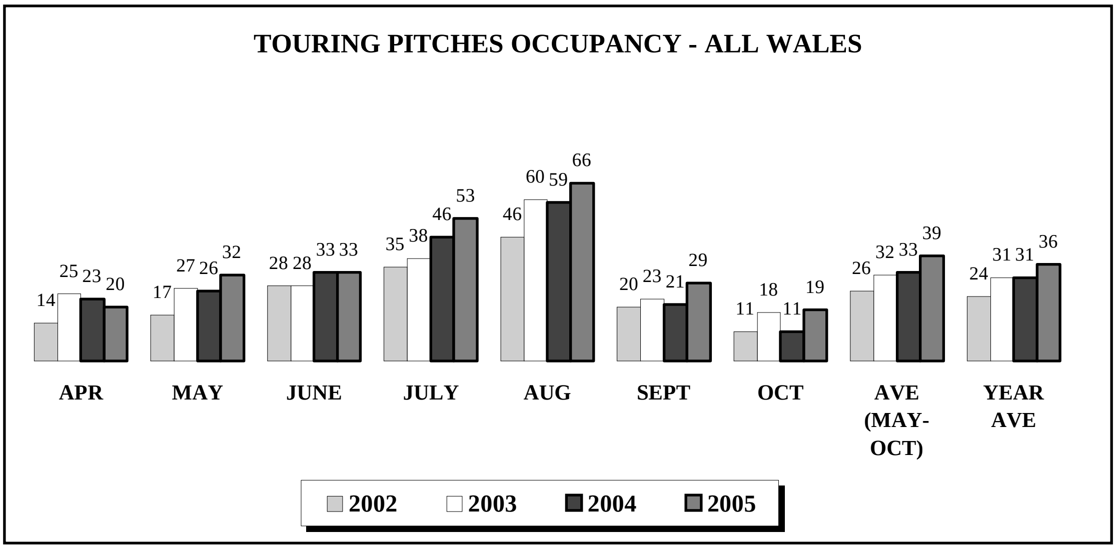
	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	52	69	82	85	97	78	66	80	76
2004	57	56	74	78	83	76	54	70	68
2003	53	65	72	77	82	82	66	74	71
2002	41	61	80	79	89	80	56	74	69

5. TOURING PITCHES

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

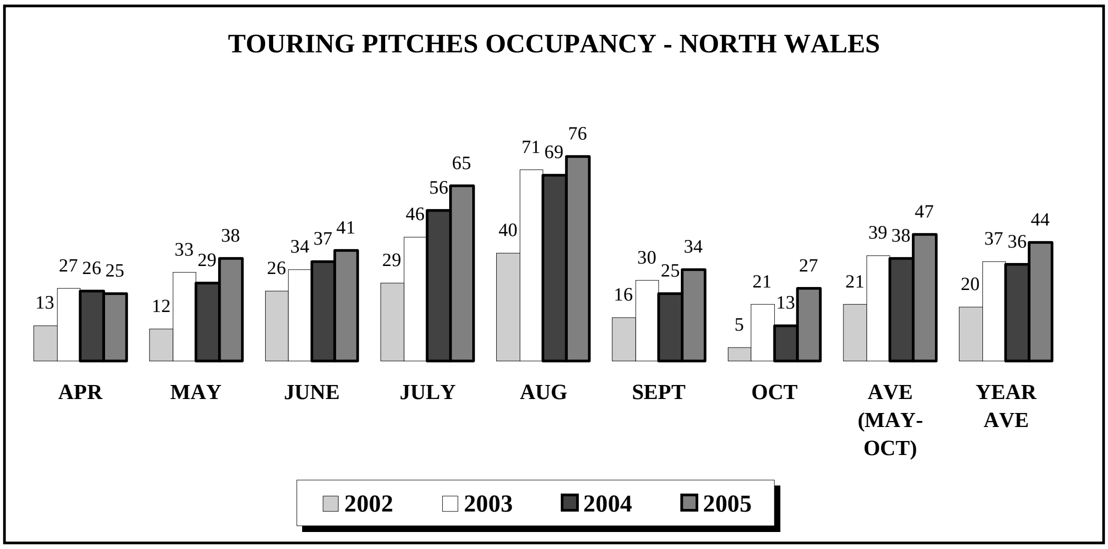
Key Findings

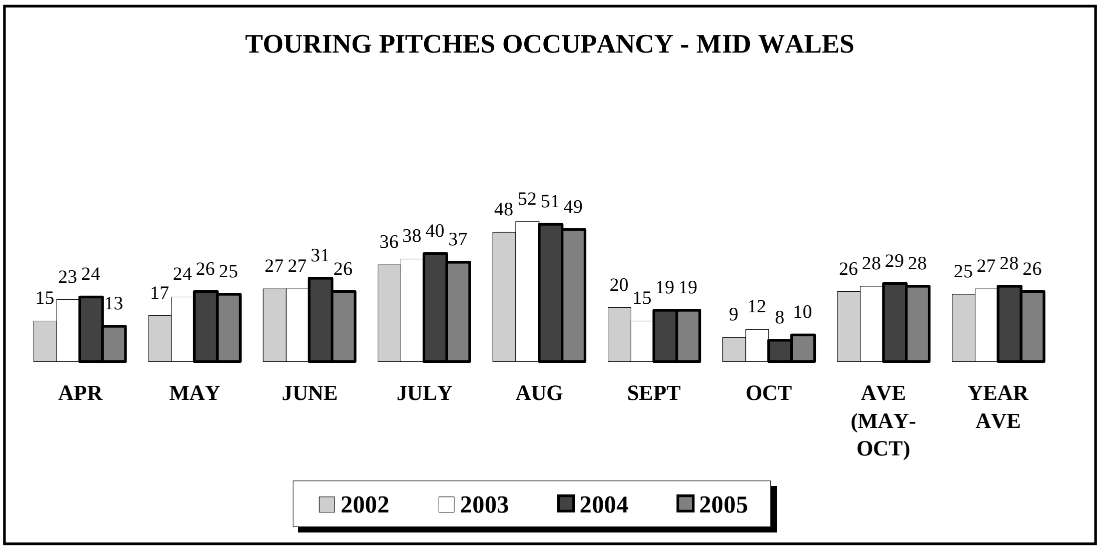
Occupancy levels for touring pitches continues a trend of steady improvement since 2002 with 5% increase in 2003 and 2004 levels to 36% in 2005.

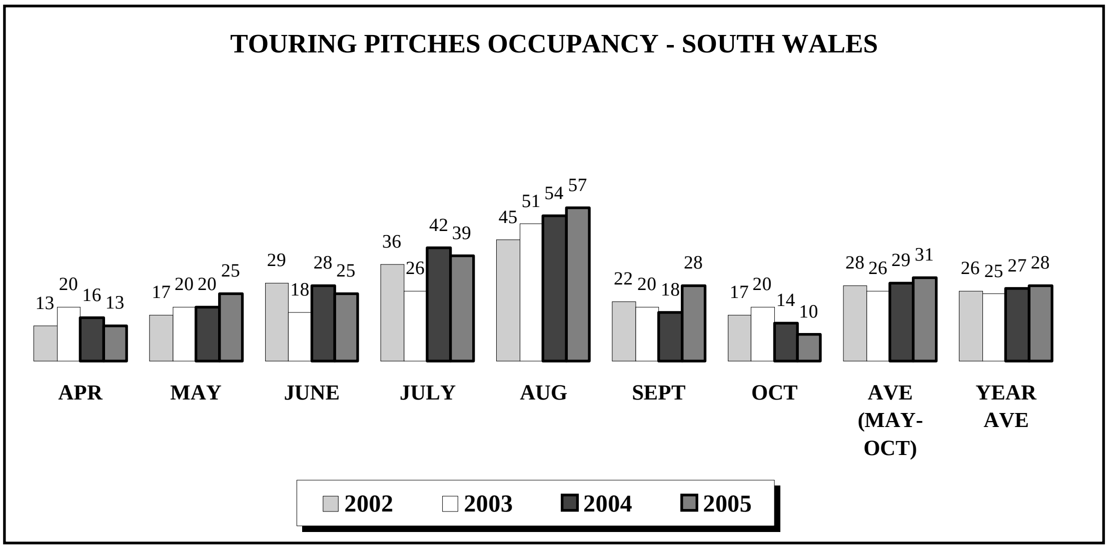


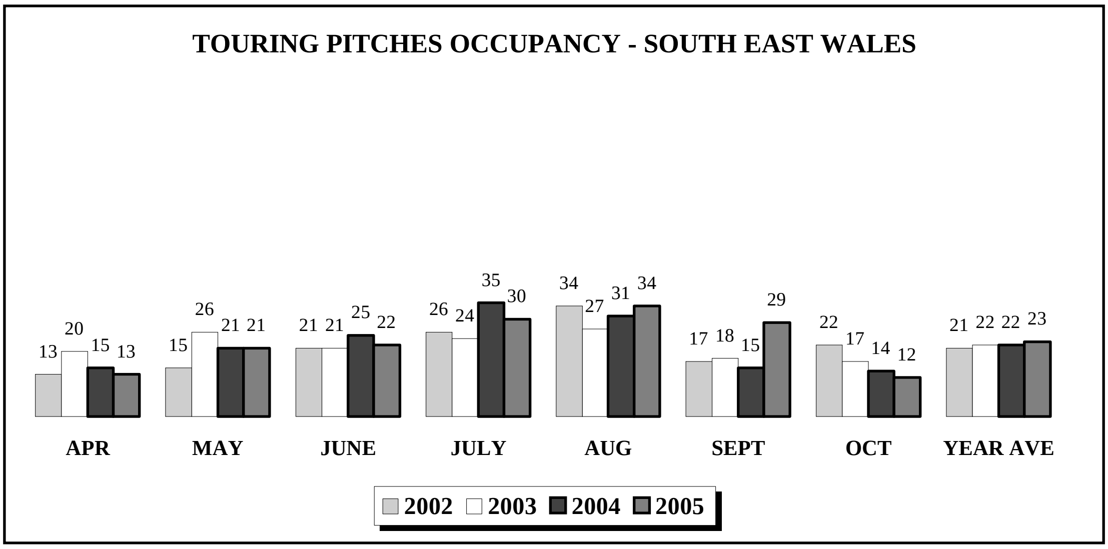
Regional Trends

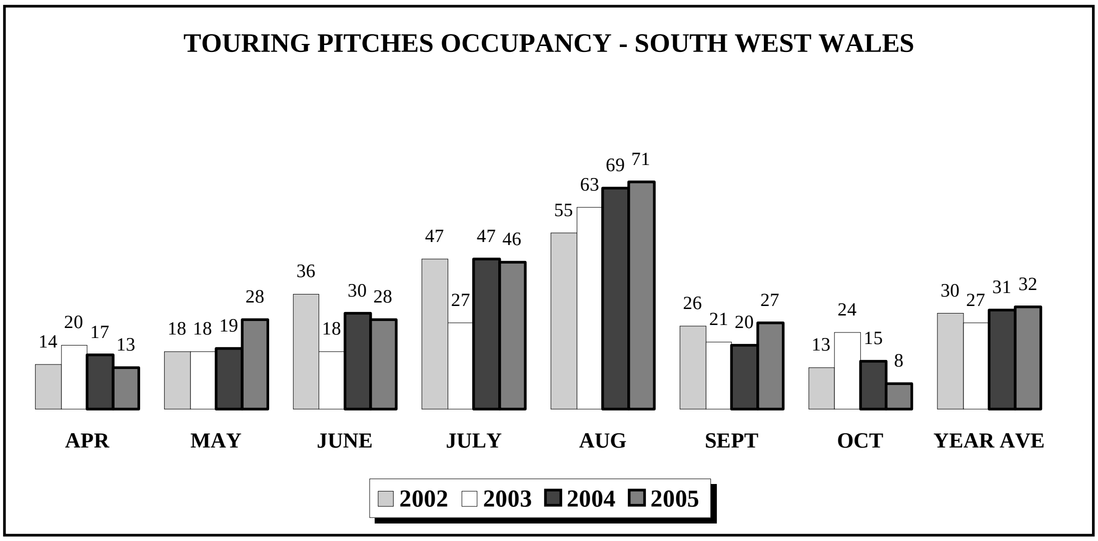
Occupancy levels in North Wales show the greatest increase since the previous year with 44% occupancy – an increase of 8%. South Wales has increased just 1% since the previous year to 28% while Mid Wales has declined 2% to 26%.


TOURING PITCHES OCCUPANCY - NORTH WALES
13 27 26 25
12 33 29 38
26 34 37 41
29 46 56 65
40 71 69 76
16 30 25 34
5 21 13 27
21 39 38 47
20 37 36 44
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
AVE (MAY-OCT)
YEAR AVE
2002
2003
2004
2005


TOURING PITCHES OCCUPANCY - MID WALES
15 23 24 13
17 24 26 25
27 27 31 26
36 38 40 37
48 52 51 49
20 15 19 19
9 12 8 10
26 28 29 28
25 27 28 26
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
AVE (MAY-OCT)
YEAR AVE
2002
2003
2004
2005


TOURING PITCHES OCCUPANCY - SOUTH WALES
13 20 16 13
17 20 20 25
29 18 28 25
36 26 42 39
45 51 54 57
22 20 18 28
17 20 14 10
28 26 29 31
26 25 27 28
APR
MAY
JUNE
JULY
AUG
SEPT
OCT
AVE (MAY-OCT)
YEAR AVE
2002
2003
2004
2005





Touring Parks: Overseas visitors %

The proportion of overseas visitors to touring parks has remained at 2004 levels with 2% occupancy over the year.

	Apr	*May*	*June*	*July*	*Aug*	*Sep*	*Oct*	*Average (May–Oct)*	*Year Ave*
2005	1	2	3	3	2	1	0	2	2
2004	1	2	2	3	2	2	0	2	2
2003	0	6	3	8	7	9	0	6	5
2002	1	1	3	5	5	2	1	3	3

Touring Parks: Inland/Coastal %

Parks in coastal locations continue to have higher occupancy levels than inland locations with the gap widening in 2005 due to considerably higher occupancy levels in coastal locations rather than a significant decline in inland locations. Coastal locations now have 14% higher occupancy than inland locations over the year.

Coastal Locations %

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	22	36	39	61	75	32	23	44	41
2004	22	26	33	52	66	22	11	35	33
2003	26	28	30	41	69	24	22	36	34
2002	15	18	30	40	53	17	9	28	26

Inland Locations %

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	14	24	25	35	52	25	11	29	27
2004	24	24	33	38	45	21	11	29	28
2003	21	26	23	30	40	21	13	26	25
2002	13	15	25	29	37	23	12	24	22

Touring Parks: Grading %

Occupancy levels in 1 to 3 star sites show an increase of 1% above the previous year to 33% in 2005, while occupancy levels for 4 to 5 star sites shows a much stronger increase from 32% in 2004 up to 38% in 2005.

1-3 Stars %

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	17	29	28	47	66	30	14	36	33
2004	19	25	34	47	56	22	19	34	32
2003	21	24	25	36	53	23	20	30	29
2002	12	15	26	37	43	17	11	25	23

4-5 Stars %

	April	***May***	***June***	***July***	***Aug***	***Sep***	***Oct***	***Average (May-Oct)***	***Year Ave***
2005	22	32	37	54	69	30	22	41	38
2004	25	27	33	47	63	21	9	33	32
2003	26	27	29	40	63	21	16	33	32
2002	16	18	30	35	50	21	11	28	26

ANNEX 1: SURVEY METHODOLOGY

The Wales Tourist Board has undertaken a range of monitoring exercises since the 1970s. Since 1987 the Board has commissioned Beaufort Research on an annual basis to conduct a monitoring survey amongst visitor attractions, self-catering agencies and holiday caravan/camping parks. The Board has again appointed Beaufort to undertake the monitor in 2004 and over the period . The methodology is based upon that employed in 2003.

Sampling and recruitment

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

The main sectors covered are:

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

Samples were chosen and recruited in the following way at the start of the 2004 survey year:

- A sample of 285 caravan/camping parks was selected to form the sample. All parks who formed part of the panel in 2004 and who were willing to participate in 2004 were sent letters and recruitment forms early in March, to complete details regarding their outlet. At this stage it was also established whether each co-operator required their correspondence and survey materials in Welsh or English. This was then logged onto our database and for the remainder of the season they would receive materials in the language of their choice. Replacement parks were selected onto the panel to replace those who no longer wished to participate.

- A sample of 19 letting agencies and 317 verified independent self-catering operators were selected, again mainly those who had formed part of the panel in 2004. Replacements for those who no longer wished to take part were recruited by post, being sent self-completion forms at the end of December 2004 along with an explanatory letter about the survey.

Data collection

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

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

Sample sizes (2004)

	Jan	*Feb*	*Mar*	*Apr*	*May*	*Jun*	*Jul*	*Aug*	*Sep*	*Oct*	*Nov*	*Dec*
S/C Independents	123	130	158	159	167	165	167	171	161	159	136	126
S/C Agencies												
Static Parks	-	-	-	35	35	38	35	35	35	35	28-	-
Touring Pitches	-	-	-	30	38	35	36	39	34	31	-	-

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

Time Period

In the self-catering sector each period commences on a Saturday and finishes on a Friday. Thus, whilst analysis is described in calendar months terms the periods are not precisely so. The precise periods covered in 2005 were as follows:

January	*1st* January	-	4th February
February	*5th* February	-	4th March
March	*5th* March	-	1st April
April	*2nd* April	-	6th May
May	*7th* May	-	3rd June
June	*4th* June	-	1st July
July	*2nd* July	-	5th August
August	*6th* August	-	2nd September
September	*3rd* September	-	7th October
October	*8th* October	-	4th November
November	*5th* November	-	2nd December
December	*4th* December	-	6th January 2006

Monitoring encompasses five-week months in January, April, July, October and December.

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

Analysis

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

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

North:	Anglesey, Conwy, Denbighshire, Flintshire, Wrexham, Gwynedd North (Caernarfonshire)
Mid:	Gwynedd South (Meirionydd), Ceredigion, Powys
South East:	Bridgend, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Vale of Glamorgan, Cardiff, Newport, Monmouthshire
South West:	Pembrokeshire, Carmarthenshire, Swansea, Neath & Port Talbot.

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

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

The regions analysed are defined as follows:

North:	Anglesey, Conwy, Denbighshire, Flintshire, Wrexham, Gwynedd North (Caernarfonshire)
Mid:	Gwynedd South (Meirionydd), Ceredigion, Powys
South East:	Bridgend, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Vale of Glamorgan, Cardiff, Newport, Monmouthshire
South West:	Pembrokeshire, Carmarthenshire, Swansea, Neath & Port Talbot

Self Catering Agencies: No weighting is applied to the Agencies analysis. It is a Pan-Wales survey as it is not possible to split the Agencies up by region.

ANNEX 2: SPECIMEN COPIES OF QUESTIONNAIRES

Self-catering Agencies

Self-catering independent operators

Parks