

**Executive Summary**  
**Prepared for Adventa**  
**Accommodation Stock Survey**  
**2004**

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## **Introduction and Background**

Adventa is Monmouthshire's LEADER+ rural development programme, jointly funded by the European Agricultural Guarantee and Guidance Fund, the National Assembly for Wales, and Monmouthshire County Council with support from the Welsh Development Agency.

This is the third wave of the Monmouthshire accommodation stock survey. The previous waves took place in 1995 and 2002. As operators have joined and left the marketplace since then there was a need to update the information held. The independent consultancy Strategic Marketing was commissioned to carry out the necessary research.

## **Research Objectives**

The key aims of the research were to:

- create an up-to-date picture of the accommodation stock;
- provide a sector analysis to satisfy Eurostat requirements;
- provide a geographic analysis of accommodation stock; and
- provide trend information in comparison with the 2002 study.

## **Methodology & Sampling**

Questionnaires were despatched to 386 accommodation operators in Monmouthshire. Of these addresses, 294 were provided by Adventa, and these were supplemented with a further 92 addresses gathered from desk research carried out by Strategic Marketing. Around 30% of the completed questionnaires were returned by post, and all those who didn't respond by post were then contacted by phone.

In total, 222 fully completed questionnaires were returned from operators within the county. 15 operators refused to take part in the survey and a further 57 no longer provide visitor accommodation so were out of the scope of this study. They have been coded on the database as closed for future reference.

There were 33 duplicate and incomplete addresses on the database, and 59 operators that we were unable to contact in order to find out if they were still trading or not. We contacted the Wales Tourist Board to see if they had any further information on these, but as they had no further information they were coded as non-response and subsequently excluded from the analysis.

Where respondents only provided information on the number of bedrooms, the number of bedspaces was imputed using the convention of 1 bedspace per single room, 2 bedspaces per double room, and 3 per family room. The bedspace figure for caravan and camping was arrived at by using the industry standard method of multiplying the number of units/pitches available by 4.

# Management Summary

## Overview

In total, the bedstock for Monmouthshire is 6,627 bedspaces. Over one third (36%) of these (2,397) are serviced bedspaces, 14% (894) are self-catered with the remaining 50% (3,336) being caravan and camping bedspaces.

The number of bedspaces has declined from 7,688 in 2002, to 6,627 at present. This decrease is due to the number of operators who have closed since the 2002 survey (58) and could also be due to some double-counting on the previous survey, as 62 of the addresses provided were duplicates or incomplete.

When asked about the awards they have gained, there were three awards that the operators mentioned most frequently. They are Walkers Welcome, Cyclists Welcome and Welcome Host – each held by just under 30% of operators. While Cyclists and Walkers welcome still received 9 mentions apiece when operators were asked about future awards they would like to gain, the Welcome Host was less popular (with only 4 mentions). Green Dragon was the most popular, with 11 mentions.

## Serviced Accommodation

There are 141 serviced accommodation providers in Monmouthshire, compared with 171 in 2002. Most of this decline of 30 providers is due to a fall in the number of farmhouses and pubs/inns. This is in line with recent economic trends, due to several factors such as the foot and mouth crisis in 2001, and the recent property boom. Many small operators have either stopped offering accommodation as they concentrate on other endeavours, or have sold off barn buildings and rural properties for residential conversions and second-homes.

The majority (81%) of the operators are hoteliers and bed & breakfast operators (including guesthouses and farmhouses). The remainder are made up of public houses and restaurants with accommodation, as well as a handful of more specialised operators such as hostels and conference centres.

There are 1,150 bedrooms in total in this sector, with 2,397 bedspaces, compared with 2,809 bedspaces in 2002. Of the 2,397 bedspaces, 73% are ensuite, compared with 79% in 2002.

Only 14% of the ensuite bedrooms are singles, with the rest being twins, doubles or family rooms.

Almost 90% of the serviced accommodation operators are open all year round, with practically all (99%) being open from April to September.

Seven out of ten (70%) of the serviced accommodation operators say that they have been inspected and graded by the Wales Tourist Board, the AA or the RAC. The vast majority (87%) of these have been graded by the Wales Tourist Board. 27% are graded by the AA, and 4% by the RAC. (NB. The percentages do not add to 100 as some operators have been graded by more than one organisation). Of those who have not been graded only a quarter are waiting for a grade to be awarded.

A significant proportion (87%) of serviced accommodation operators say that they buy food from local producers, with only 35% feeling that they need any help sourcing local food.

The main barrier to buying locally produced food is price, as it is felt that the larger commercial outlets are cheaper than local suppliers. Other issues mentioned are the inconvenience of buying from many smaller outlets, and the lack of choice and availability of sufficient quantities

As would be expected in a relatively rural location, more than 75% of operators provide facilities to complement outdoor activities such as hiking and cycling, which is a significant part of the attraction of Monmouthshire as a leisure destination. The provision of other supplementary services, such as internet access and recycling facilities (both 44%), are less common.

Perhaps of some concern, in light of the recent legislative changes surrounding disabled access, is the relatively low percentage of operators offering ground floor rooms for the less able-bodied. Only one third (33%) of operators responded that these facilities were currently available.

This trend is echoed by accommodation providers as a whole, as only one in five (21%) said that they had prepared a disability statement for their accommodation, and less than a third (30%) of these had been approved by the Wales Tourist Board.

### **Self-Catered Accommodation**

There are 75 self-catered accommodation providers in Monmouthshire, compared with 83 in 2002. There are strong indications that this is due to a decrease in land accommodation stock, such as houses, bungalows and cottages, alongside an increase in water based stock such as boats and barges. The self-catered operators cover 108 units (houses, cottages, flats etc), 30 boats/barges and 48 others – most of which are bunkhouses/hostels.

These 186 units contain 894 bedspaces, which is an increase on the 771 available in 2002. This net increase is due to an increase in boat bedspaces to 158 (from 95 in 2002), alongside an increase in conventional property bedspaces to 736 (from 676 in 2002).

Almost eight out of ten (79%) of the self-catered operators are open all year round, with nearly all of them (97%) open from April through to October.

### **Caravan and Camping**

There are 26 operators within Monmouthshire providing caravan and campsite accommodation. This is a decline from the 33 in 2002. 7 of these operators also offer self-catering or serviced accommodation, with the remaining 19 offering only caravan/camping.

There are 834 units/pitches available in this sector, which equates to 3,336 bedspaces (4 x the number of units). 4% of these spaces are static caravan units, 59% are touring caravan spaces, and the remaining 37% are camping pitches. The number of pitches/units in 2002 was 1,027, the main difference is due to a fall in the number of touring caravan and camping pitches. Static caravans have increased to 34 from 17 in 2002, which is a return to just above the 1995 level of 32.

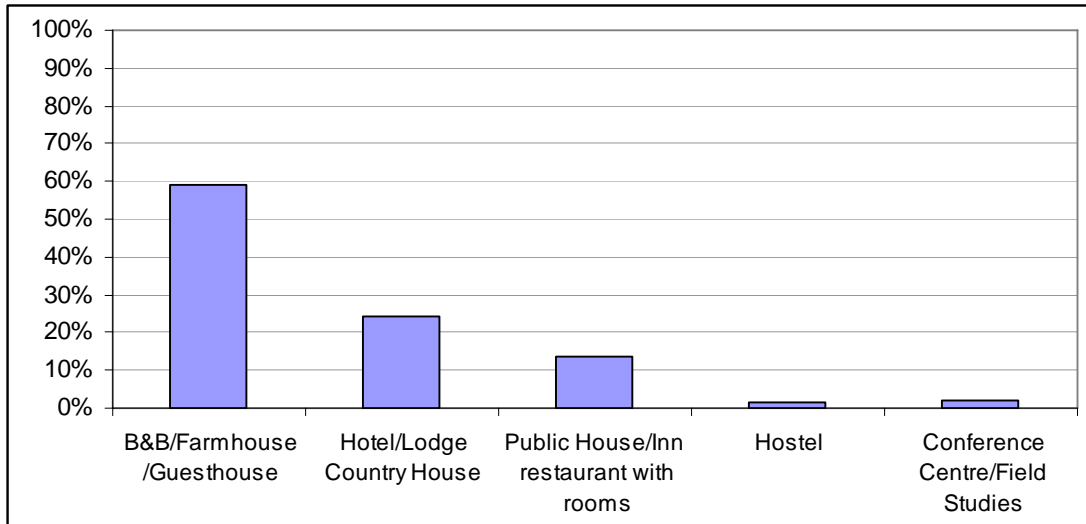
Only 6 of these operators say that they accommodate long stay residents, and 11 (42%) are open all year round. As with the serviced accommodation, most (92%) of the operators are open from April to September.

# Research Findings

## Serviced Accommodation

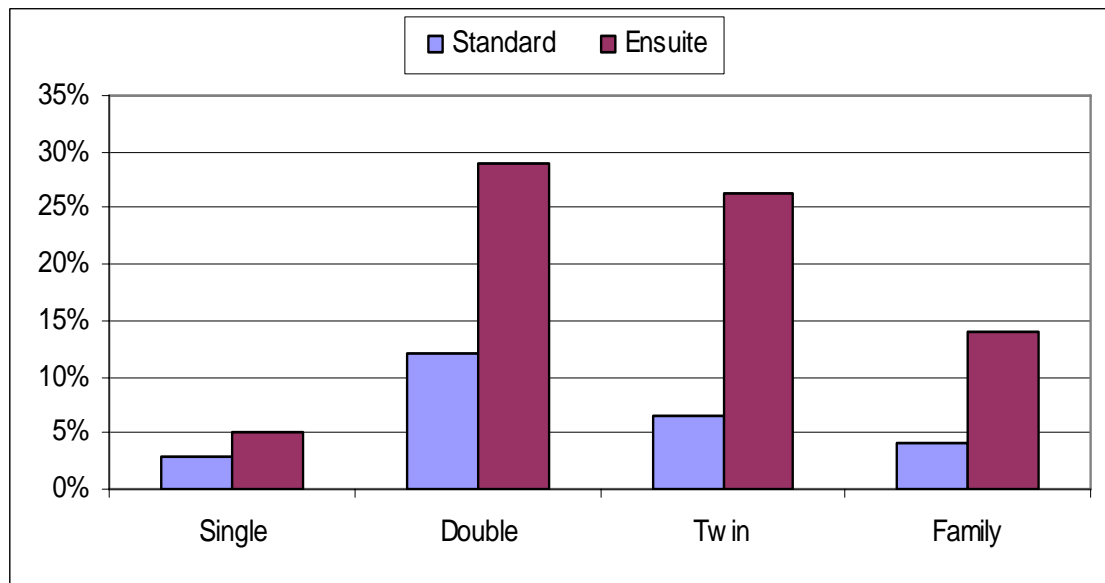
Almost three out of five (58%) of serviced accommodation establishments in Monmouthshire are Bed & Breakfasts (including farms and guesthouses). The graph below shows the distribution across the various types of accommodation. Some of the categories have been grouped together as they contained only one or two operators.

Chart Q5 – Type of Serviced Accommodation – base 222 respondents



Nearly three-quarters (73%) of all serviced accommodation bedspaces are ensuite, of which less than one in ten (7%) are in single rooms. Just under three-quarters (73%) of all serviced accommodation bedspaces are either twin or double rooms (as opposed to families or singles). The chart below shows the distribution of bedspaces by room type for the serviced accommodation sector.

Chart Q6 – Serviced bedspaces by type of room – base 141 respondents



## Quality Grading of Serviced Accommodation

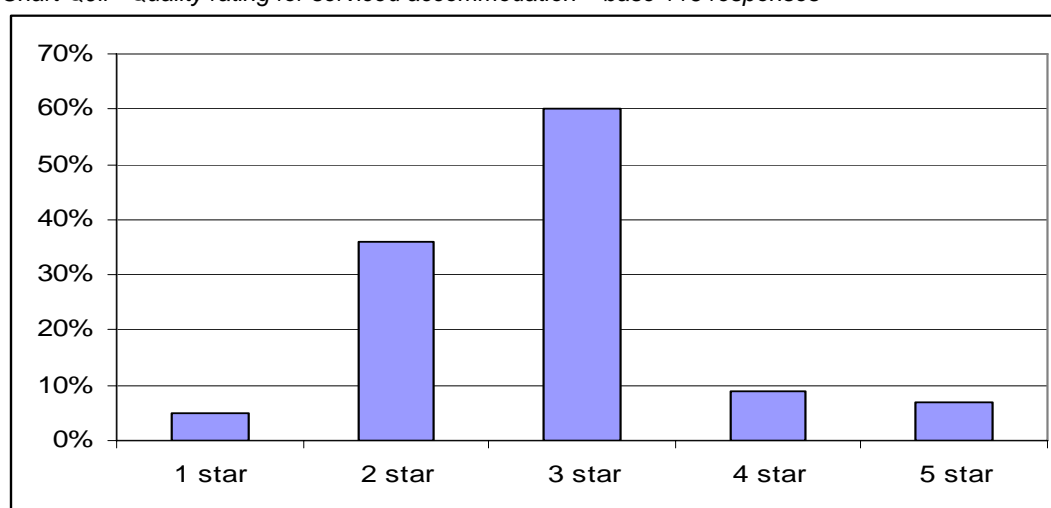
Seven out of ten (70%) of serviced accommodation providers have been graded by the Wales Tourist Board, the AA or the RAC.

Of these, almost nine out of ten (87%) have been graded by the Wales Tourist Board, just over a quarter (27%) by the AA, and fewer than one in twenty (4%) by the RAC.

Just over one in ten (13%) of serviced accommodation operators are waiting for a grade to be awarded from one of these authorities.

The majority (60%) of all the graded serviced accommodation stock has a 3-star rating or equivalent (e.g. 3 diamond, 3 crowns). Just over a third (36%) has a 2-star rating or equivalent. The chart below shows the distribution across the different grades (NB. Some accommodation operators have grades from more than one awarding body, so the percentages add to more than 100%).

Chart Q9ii – Quality rating for serviced accommodation – base 116 responses



## Self-Catering Accommodation

The table below shows the breakdown of bedrooms and bedspaces in the self-catering sector.

Table Q16 – Self-Catering accommodation breakdown – base 75 respondents

	Total No of Units	Total Double Bedrooms	Total Single Bedrooms	Total Bedspaces
<b>Houses, Bungalows &amp; Cottages</b>	89	160	83	494
<b>Apartments &amp; Flats</b>	13	21	5	48
<b>Farmhouses</b>	6	9	2	26
<b>Boats/Barges</b>	30	39	36	158
<b>Other</b>	48	6	39	168
			<b>Total Bedspaces</b>	<b>894</b>

## Quality Grading of Self-Catering Accommodation

Almost eight out of ten (79%) of self-catered operators have been inspected by the Wales Tourist Board or the English Tourism Council. Almost half of these (47%) are 4 star or equivalent, one in five (21%) have a 5 star grade, and a further 16% have a 3 star grade. Only two of the operators are awaiting gradings at present.

## Caravan & Camping Accommodation

There are 26 operators providing caravan and campsite accommodation in Monmouthshire. Of these, 7 (27%) are Holiday Park operators, 16 (62%) are Touring Park operators and the remaining 5 (19%) are Camping Parks. The table below gives the breakdown of the types of accommodation available in each type of park. The total number of bedspaces is calculated by multiplying the number of units by 4, as is the industry norm.

*Table Q22 – Caravan & Camping accommodation breakdown – base 26 respondents*

	<b>Static Caravan Units</b>	<b>Touring Caravan Spaces</b>	<b>Camping Pitches</b>	<b>Total Bedspaces (no of spaces x 4)</b>
<b>Holiday Parks</b>	34	185	92	1,244
<b>Touring Parks</b>		304	189	1,972
<b>Camping Parks</b>			30	120
<b>Total</b>	34	489	311	3,336

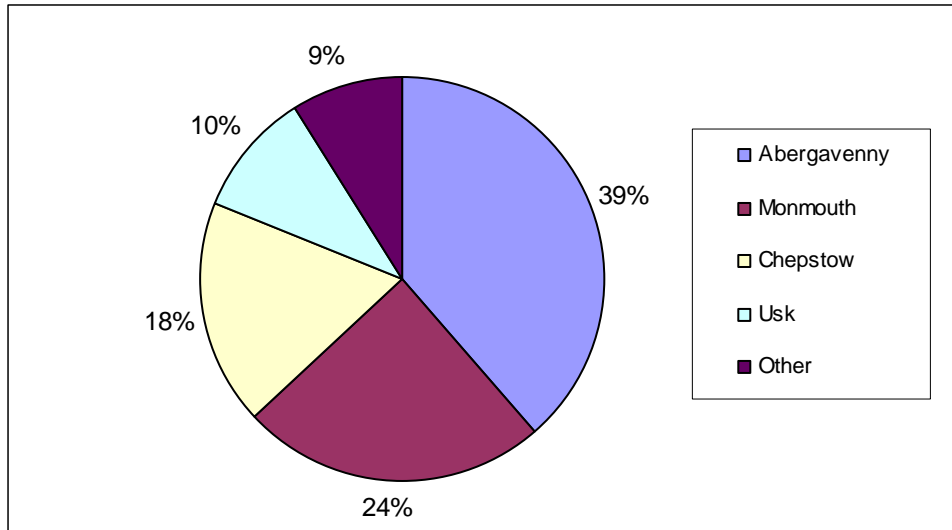
## Quality Grading of Caravan & Camping Accommodation

Less than half (9) of the caravan and camping operators have been graded by the Wales Tourist Board, and 3 of these have also been graded by the AA. All of the operators have ratings of either 3 or 4 stars. There is one operator currently waiting for a grading.

## Regional Analysis

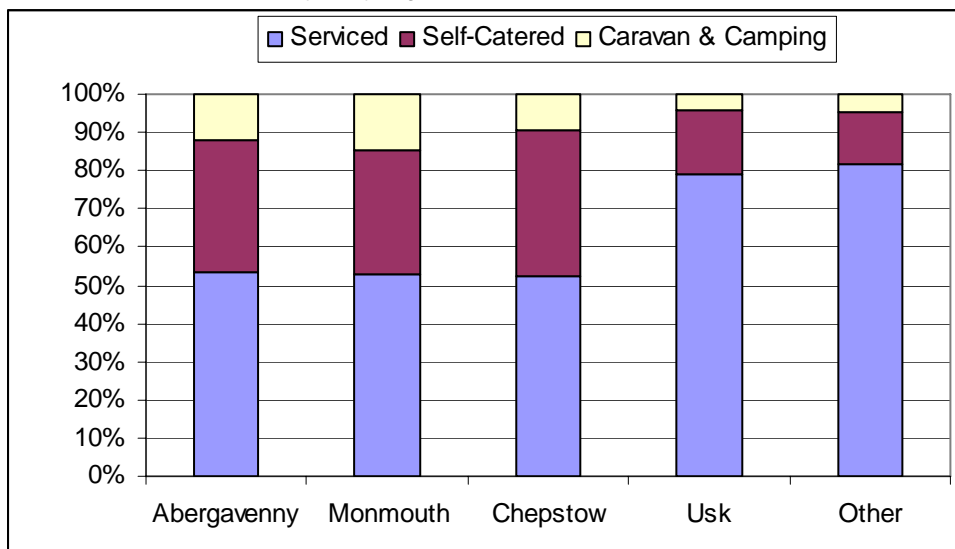
The survey responses were grouped according to their postal address, to give an idea of the regional split of accommodation across Monmouthshire. Just under two out of five (39%) of the properties were located in Abergavenny, with almost a quarter (24%) in Monmouth. The chart below shows the regional breakdown.

Chart R1 – Accommodation operators by region – base 222 respondents



The chart below shows the proportion of each accommodation type in each of the main regions in Monmouthshire. More than half of the operators in each area offer serviced accommodation, while less than 15% offer camping. Some of the operators offer more than one type of accommodation and are therefore counted in each sector.

Chart R2 – Accommodation type by region – base 222 respondents



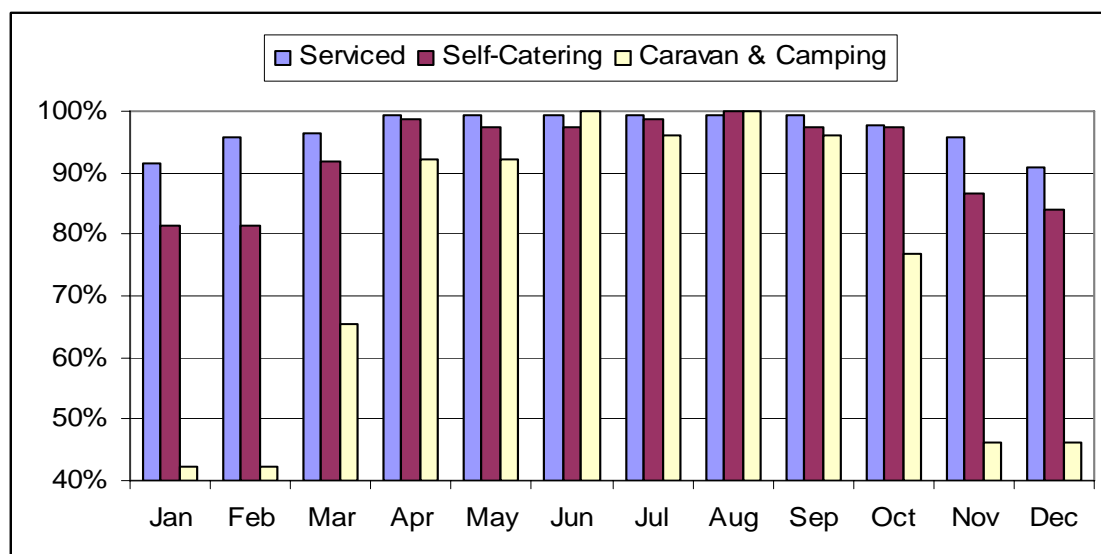
The table below details the breakdown of bedspaces across the different sectors in each region.

	Serviced	Self-Catering	Caravan & Camping
<b>Abergavenny</b>	750	544	1368
<b>Caldicot</b>	28	8	0
<b>Chepstow</b>	460	101	104
<b>Magor</b>	111	0	0
<b>Monmouth</b>	367	155	1444
<b>Pontypool</b>	29	0	20
<b>Raglan</b>	238	12	0
<b>Usk</b>	414	74	400
<b>Total</b>	<b>2397</b>	<b>894</b>	<b>3336</b>

### Availability of Accommodation

The vast majority (81%) of operators are open all year round. Within the serviced accommodation and self-catering sectors at least 80% of operators are open even in the quietest winter months. Caravan and camping accommodation has the largest seasonal variation, with less than half (42 to 46%) open from November to January, and over 92% open between April and September. The graph below shows the percentage of operators open, within each sector, for each month of the year.

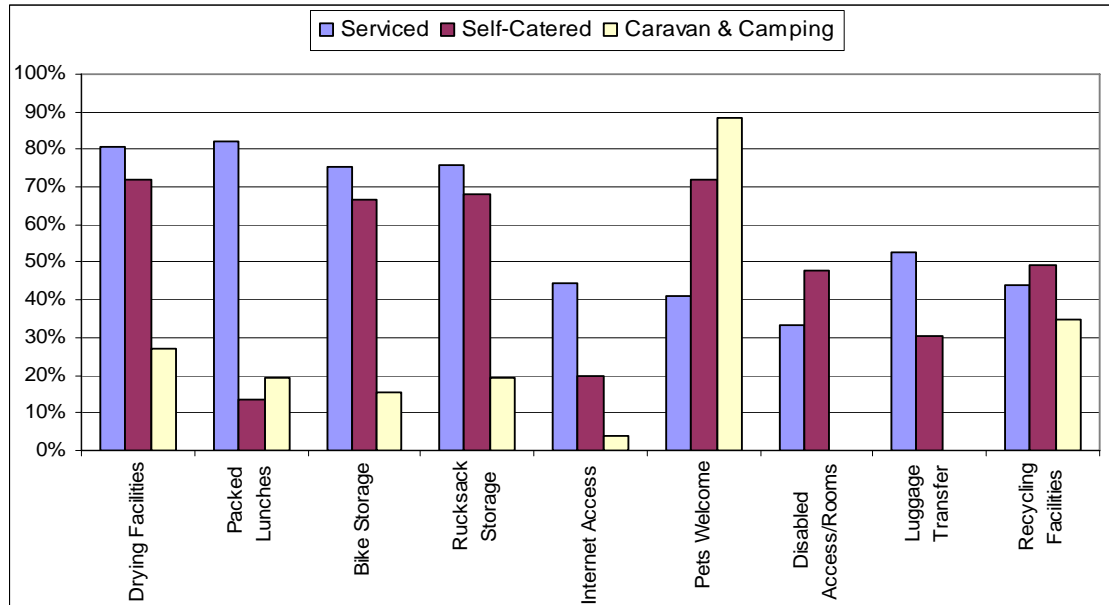
Chart Qs 7, 17 & 24 – Accommodation available by month – base 141, 74 & 26 respondents



## Facilities Available

The facilities offered vary depending on the type of accommodation, although some are offered by all accommodation types. The chart below shows clearly that caravan and campsite operators are more welcoming of pets, whereas serviced accommodation operators are more likely to offer packed lunches. Generally, these facilities are more widespread amongst serviced and self-catering accommodation sectors.

Chart Qs 14, 18 & 28 –Facilities available by accommodation sector – base 141, 74 & 26 respondents

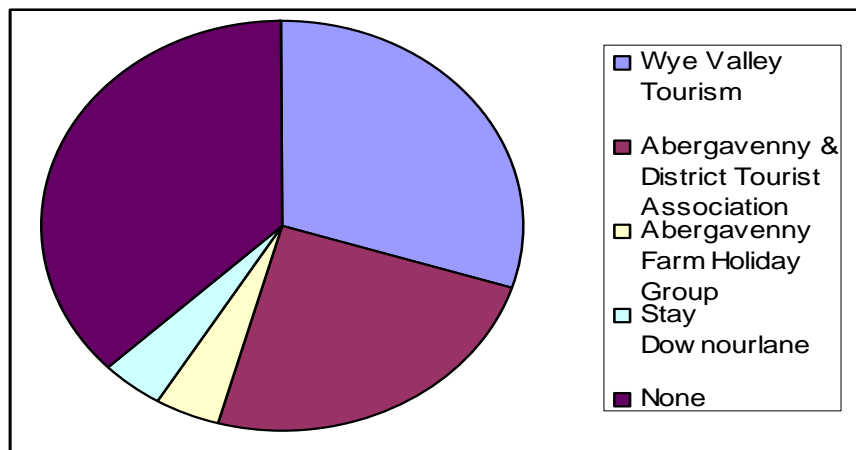


## Membership of Tourist Associations

Wye Valley Tourism has the highest level of membership among the operators, with just over a third (34%) being members. The next highest was the Abergavenny & District Tourist Association, with just over a quarter (27%). Some of the operators are members of more than one association, so the chart below shows the proportion of responses given to this question, rather than the number of operators.

Just over two out of five (42%) of the operators are not members of any of the associations or holiday groups.

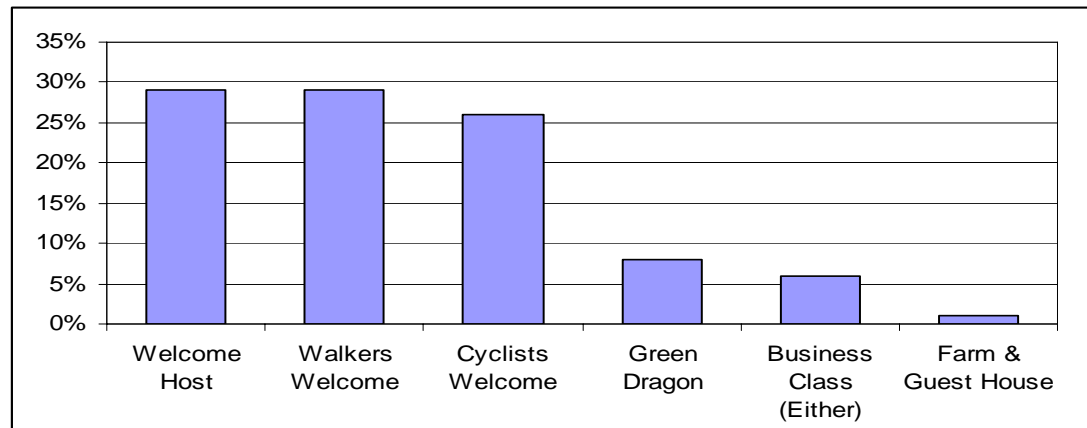
Chart Q3 – Membership of Tourist Associations – base 222 respondents



## Tourism Awards

The chart below shows the awards held by the operators who responded to the survey. There were several other responses given, of which the awards mentioned by more than one respondent were the AA Rosette (3 mentions), the Taste of Wales (2 mentions) and the Good Beer/ Good Pub guide (again with 3 mentions).

Chart Q29 – Tourism Awards Gained – base 222 respondents



Operators were also asked if there are any other awards they would be interested in gaining in the future. The most commonly mentioned awards were much the same as those from the previous question. Green Dragon received 11 mentions, with Walkers and Cyclists Welcome both being mentioned 9 times. Food & Catering awards (for example, Taste of Wales, Michelin) also received 10 comments.

Another 9 respondents stated that they would like more information about the types of awards available, and how to apply for them. A further 13 respondents stated that they would like to win 'any' award – so would probably also welcome more information about awards. The full responses to this question are listed in appendix 1.

## Observations

There are several key observations that can be made following this research:

- A high proportion of serviced accommodation is of a 2-3 star standard. There are very few operators offering luxury (5 star) serviced accommodation. A wider choice of accommodation standards would increase appeal to different types of tourist.
  - Recent research carried out into rural tourism on behalf of the Wales Tourist Board by A+ Research, also identified that tourists perceive this as a weakness of Wales as a countryside destination.
- Many of the operators are not open all year round. This could be due to a lack of visitors during the 'off-season'.
  - Previous research (as above) also suggests that there is a perception of a lack of wet-weather and non-outdoor activities in rural Wales, which could contribute to a lack of off-season visitors.
- Several operators feel that they would like more information about the various tourism awards available to them, how these would benefit their business, and how they should go about working towards them.
- A very low proportion of operators have disability statements in place. Considering the recent changes in legislation it is increasingly important to ensure that operators have these.

*NB. As this research was designed to capture bedstock within Monmouthshire it has not gone into great detail on these issues. Further research may be needed before acting on these observations.*

## Appendix.

Q29 – verbatim responses to “Which tourism awards has your accommodation gained?”

AA Rosette – 3

Taste of Wales – 2

Good Beer/ Good Pub guide – 3

International Welcome Host – 2

Camra Award

Egon Ronay

Tourism South Wales

Clean Air Charter

Food Charter

Food Award

Farm Tourism

Champagne List Award

AA Wine Award for Wales

Which Good Food Guide

Le Routier 2004

Best Place to Stay in Wales 2004

Conde Nasst 2003

Enterprise Inns - Food Award

Host and Hostess Awards

Euro Solar UK Solar Award 1995

Accolades from a magazine

AA Restaurant of the Year 2004/2005

'Pub Walks of Gwent'

Local Press

Good Food

Wales in Bloom, Champion of Champions for flowers

Runner Up - Best places to stay in Wales -WTB

National Renovation Award

Finalist in AA Landlady of 2003

Classic Host

Forest of Dean (Oakleavers)

Le Routier

Freehouse Pub of the Year etc

SWArgus Restaurant of the Year

Q30 – Verbatim responses to “Are there any other awards you would be interested in gaining for your establishment in future?”

Any/All – 13  
Would like info – 9  
Green Dragon – 11  
Walkers Welcome – 9  
Cyclists Welcome – 9  
Welcome Host – 4  
Catering/Food Awards (including Michelin Star, Taste of Wales) – 10  
Beer/Pub awards – 2  
No – 2  
Want an award developed for ‘Sense of Place’ – 2  
Farm & Guesthouse award – 2  
Business Class Standards – 2

Farming

AA & RAC

Welsh Tourist Board Activity Accreditation for our cycle time business

Hospitality Assured

True Taste Awards (WDA)

Not eligible to apply for true taste according to authorities we consulted - we would very much like acknowledgement for our food offering via adventa.

Anti Nanny Bureaucratic Award

Leisure and spa awards.

Local Produce Awards

Investor in People

Property in Bloom

Upgrade Environmental award- up to Monmouthshire CC they don't provide the service so is difficult to upgrade.