



Llywodraeth Cymru
Welsh Government

RESEARCH

Wales tourism accommodation occupancy surveys: January to March 2021

The occupancy surveys provide trend information on the demand for tourist accommodation in Wales for January to March 2021.

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Level 4 alert restrictions were still in place during January to March 2021. This included the closure of all accommodation businesses except for essential use, whilst travel was restricted to local areas until 27 March when restrictions on movement across Wales with the 'stay local' rule were lifted. Therefore, data is not available for the first quarter of 2021 for guesthouse and B&B's, static and touring caravans and hostels.

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Main points

With alert level 4 coronavirus (COVID-19) restrictions still in place for the majority of the first quarter of 2021, room occupancy in the first quarter of 2021 was substantially lower in responding hotels.

In the self-catering sector, both January and February saw less than half the unit occupancy levels of the previous year. January fell by 19 percentage points and February by 22 percentage points. With the easing of restrictions from 27 March on travel across Wales and the re-opening of self-contained self-catering units, occupancy levels in March 2021 remained static at 48%, when compared with the levels achieved in the same month in 2020. However, it should be noted that the number of self-catering properties responding was significantly reduced during this period and therefore caution should be used when interpreting these results.

Change in weighting

During several months of 2020 and the first three months of 2021, a significant number of hotels, guesthouses and B&B's were not open due to COVID-19 restrictions. This limited serviced accommodation operating resulting in only a small number of hotels and guesthouse and B&B's providing data, which impacted the weightings. Weighting of occupancy data is designed to adjust for different levels of response across regions and size bands but when the sample size is small the effect of the weighting for certain regions or size bands can be exaggerated. In the months of COVID-19 lockdown when sample sizes in some regions were in single figures, it would have had the effect of making individual establishments dominate the results. Therefore, the data in 2020 and 2021 is presented unweighted and only reflects occupancy levels of responding hotels and, guesthouse and B&B's which were open in the relevant month. Due to this, it should be noted that the hotel and, guesthouse and B&B occupancy data shown in this report for 2020 and 2021 cannot be interpreted as representing the serviced accommodation market as a whole, and given the methodological differences, is not comparable to 2019 data shown within the hotel, and guesthouse and B&B sections of this report.

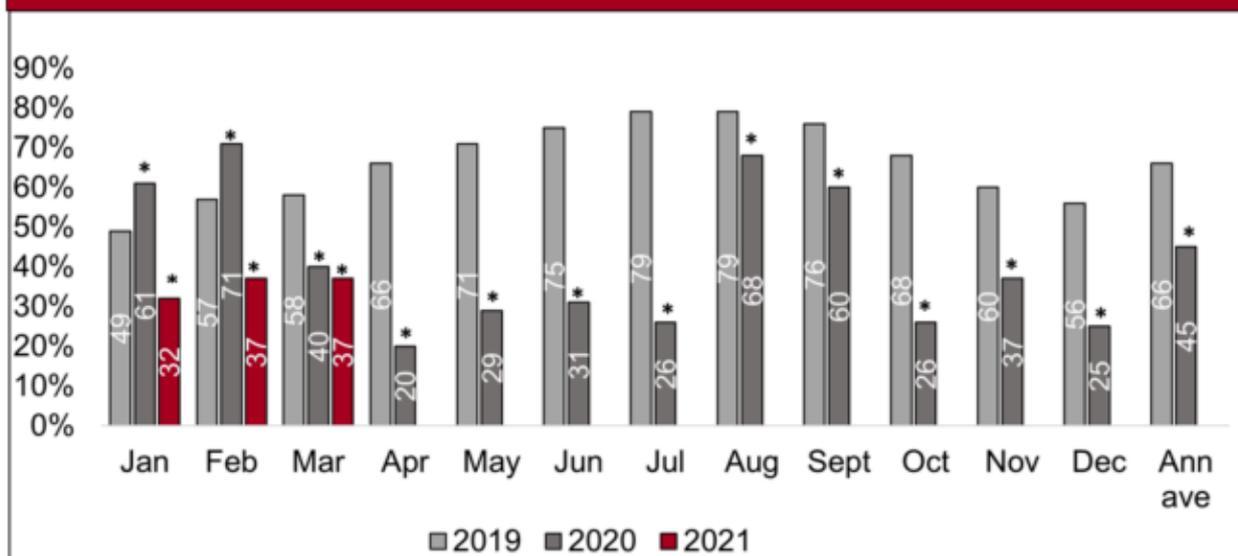
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Hotels

Chart 1: Average monthly and annual room occupancy rates, hotels, 2019 to 2021



* Due to a change in methodology during 2020, the hotel data shown within this report cannot be compared with previous years.

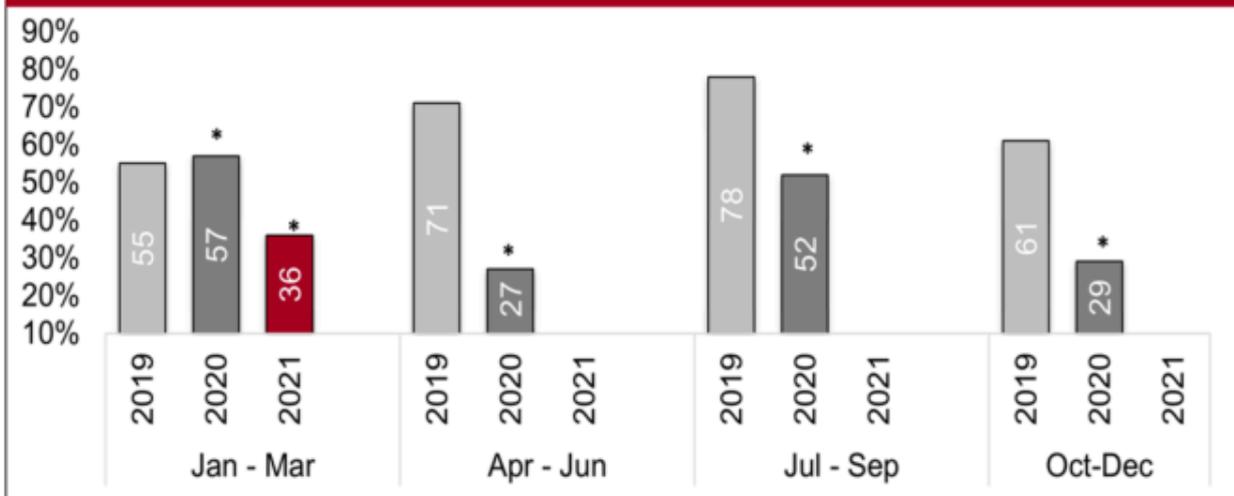
With alert level 4 COVID-19 restrictions still in place for the majority of the first quarter of 2021, room occupancy in the first quarter of 2021 was substantially lower in responding hotels that were open during this period.

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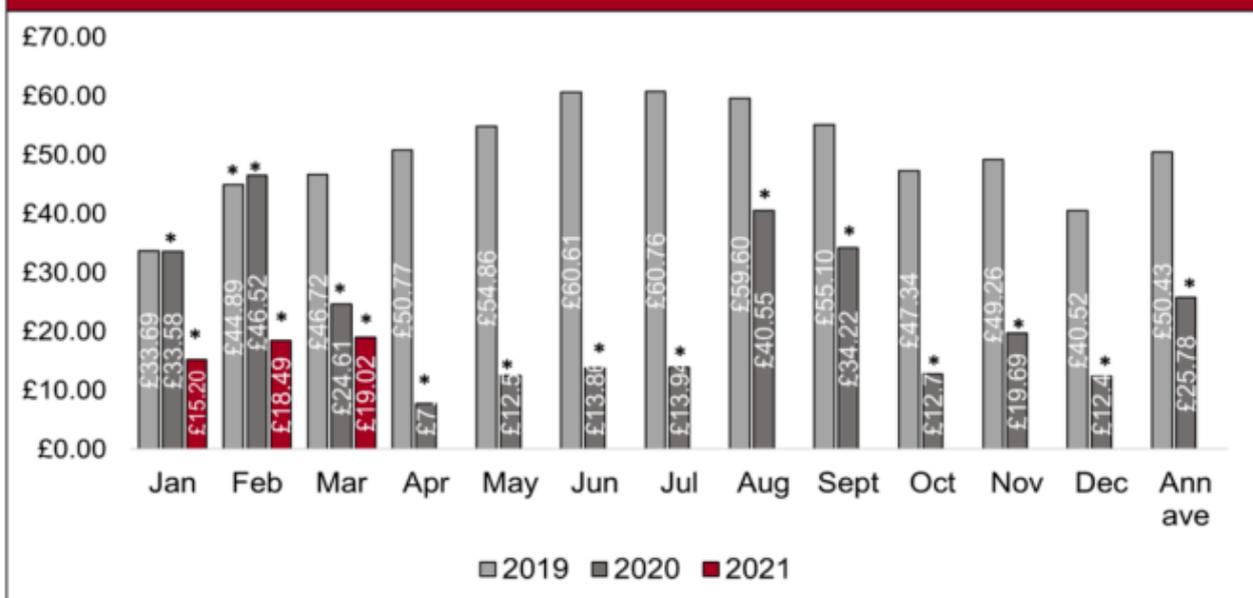
Chart 2: Quarterly room occupancy, hotels, 2019 to 2021



* Due to a change in methodology during 2020, the hotel data shown within this report cannot be compared with previous years.

Room occupancy was affected across the first quarter of the year, with responding hotels reporting in January to March average occupancy levels of just 36%.

Chart 3: Monthly and annual RevPar, hotels, 2019 to 2021



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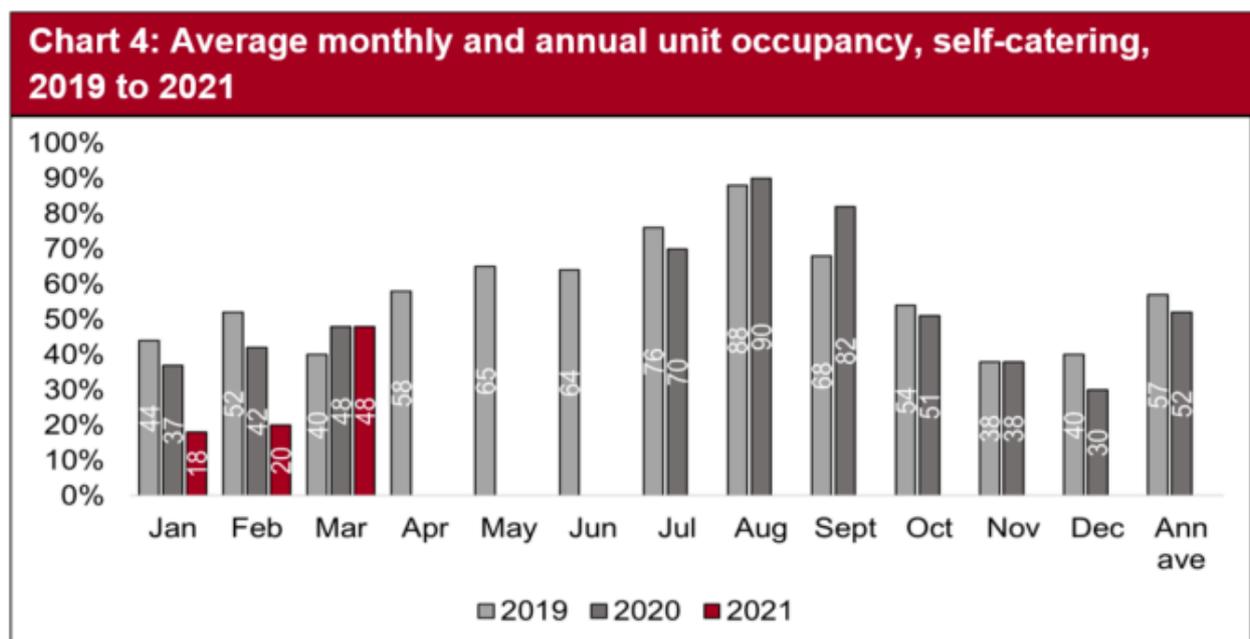
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With restrictions in place across Wales during the first 3 months of 2021, and only a small number of hotels open to key workers during this period, those responding hotels that were open, recorded much lower revenue per available room during this period.

Guesthouses and, bed and breakfast (B&B)

Most guesthouses and B&B's did not offer accommodation to key workers with the majority of establishments closed completely during the first 3 months of 2021. Therefore, data was not collected during this period.

Self-catering



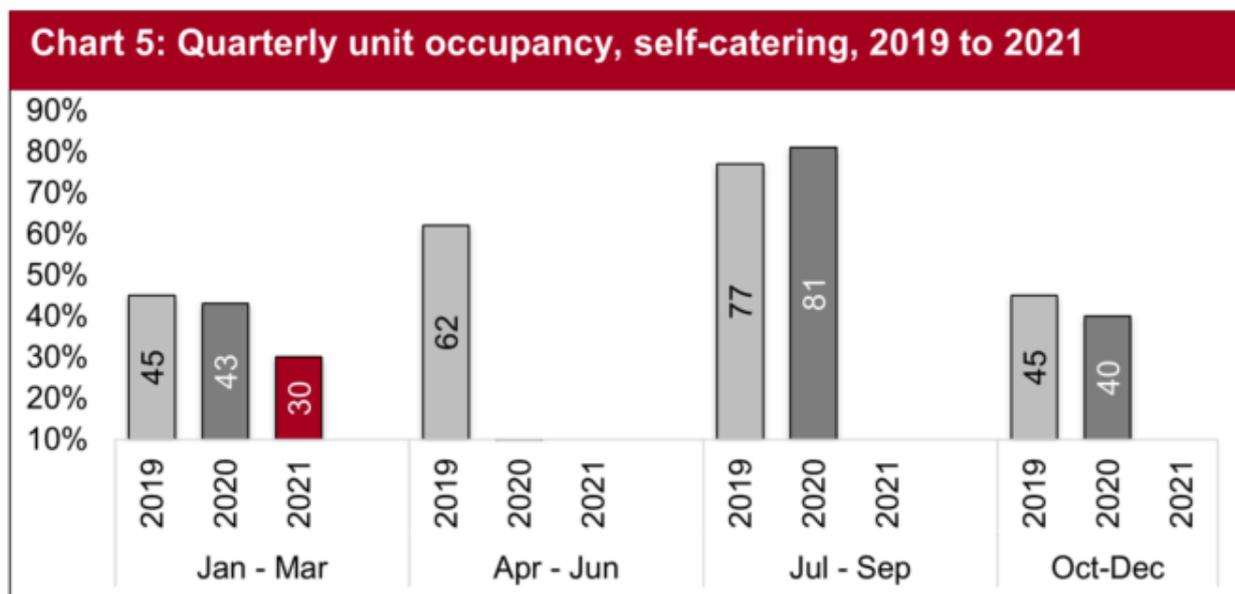
In the self-catering sector, both January and February saw less than half the unit occupancy levels of the previous year. January fell by 19 percentage points and February by 22 percentage points. With the easing of restrictions from 27 March on travel across Wales and the re-opening of self-contained self-catering units, occupancy levels in March 2021 returned to levels achieved in the same month in 2020. The number of self-catering establishments open in January and

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February was very small and therefore caution should be used when interpreting these results.



With the closure of many self-catering units, the quarterly unit occupancy for January to March fell by 13 percentage points from 43% to 30% when compared with the same period in 2020.

Static caravan holiday homes

Due to the COVID-19 pandemic, temporary closures were in place for the first 3 months of 2021, and therefore figures for the first quarter are not available for this period.

Touring caravan and camping parks

Due to the COVID-19 pandemic, temporary closures were in place for the first 3 months of 2021, and therefore figures for the first quarter are not available for this period.

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Hostels

The nature of the sector had made it difficult to fully reopen for businesses with COVID-19 restrictions on the number of guests staying in hostels. With restrictions still in place during the first 3 months of 2021, data for hostel accommodation is not available during this period.

Context

Before the national UK lockdown started on 23 March 2020, occupancy levels across all of the sectors covered in this summary report were fairly consistent with the previous year in 2019.

During the lockdown period from 23 March to mid-July, many businesses had temporarily closed due to the COVID-19 pandemic. The small sample reported on during this period in the hotel sector, was in relation to hotels that provided necessary accommodation to key workers, vulnerable groups and those who had been stranded at their accommodation due to the lockdown and restrictions on travel.

On 6 July, Wales lifted its 'Stay Local' restrictions, which enabled people to visit other areas of the country and further afield. On 11 July, lockdown restrictions on accommodation use was lifted, although a phased approach during July was adopted. Accommodation that was entirely self-contained such as holiday cottages, holiday caravans including modern touring caravans and motorhomes and some glamping accommodation could re-open. This also included hotels and other serviced accommodation (B&Bs, hostels etc.) which provided en-suite rooms and room service meals. Accommodation that offered shared facilities such as camping and caravan sites and hostels did not reopen until 25 July.

However, not all businesses re-opened immediately, and some delayed their re-opening to ensure that their premises were COVID-19 safe and risk assessments were in place, and others who ran small family businesses did not think it financially viable to open at all with restrictions in place. The risk to some business owners who had been shielding was also a factor in their decision not

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to reopen when lockdown restrictions had been lifted.

With businesses receiving visitors during the latter part of July, August and September, occupancy levels across some sectors saw signs of recovery.

With Cardiff and Swansea still in lockdown from 25 September, further local lockdowns began on the 1 October in Conwy, Denbighshire and Wrexham followed by Bangor on the 10 October. Across Wales as a whole, a firebreak lockdown began on 23 October to 9 November. New restrictions were brought in at midnight on the 19 December (Alert Level 4) which included the closure of all accommodation businesses except for essential use and travel restricted to local areas. Rules were briefly relaxed for Christmas Day before lockdown (Alert Level 4) began again on 26 December.

At the start of 2021, lockdown (Alert Level 4) was still in place and continued throughout January, February, until 27 March when Wales became the first UK nation to lift travel restrictions within its borders as the stay local restrictions were ended. Self-contained tourist accommodation, such as cottages and some hotels were permitted to re-open.

Main timelines in 2020 and 2021

- UK National Lockdown from 23 March 2020.
- 6 July 2020 Wales lifts its 'Stay Local' travel restrictions and outdoor attractions were allowed to re-open.
- Lockdown ends 11 July 2020 for accommodation businesses without shared facilities.
- Tourist accommodation with shared facilities such as camping sites were able to re-open from 25 July 2020 but any shared facilities on the premises remained closed, such as swimming pools, leisure facilities, shared shower and toilets blocks.
- Eat Out to Help Out Scheme (3 to 31 August 2020)
- 23 October to 9 November 2020 17-day firebreak in Wales.
- 19 December 2020 Christmas bubble rules changes to only allow two families to get together on Christmas Day.
- 19 December 2020 new restrictions brought in from midnight (alert level 4):

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non-essential retail, close contact services, gyms and leisure centres, hospitality and accommodation to close at the end of trading. Stay-at-home restriction to come into effect at midnight.

- 26 December 2020 Wales enters lockdown (alert level 4) after rules were briefly relaxed over Christmas Day.
- Lockdown restrictions (alert level 4) continue in January and February 2021.
- 27 March 2021 Wales becomes the first UK nation to lift travel restrictions within its borders as the stay local restrictions are ended. Self-contained tourist accommodation, such as cottages and some hotels are permitted to re-open.

Sample size

Alert Level 4 restrictions began on 19 December 2020, which once again saw the closure of accommodation businesses with exceptions for essential use and travel restricted to local areas. With rules briefly relaxed for Christmas Day, lockdown (Alert Level 4) began again on 26 December 2020. These restrictions continued in the first 3 months of 2021 with travel restrictions within the Wales borders lifted from 27 March 2021 which allowed self-contained accommodation to open (including self-catering accommodation and some hotels) to reopen to visitors.

Each of the monthly samples sizes by sector shown below are those businesses that were open and provided data for that month.

Table 1: Monthly sample size by sector, January to March 2021

	Hotels: open	Hotels: closed	Guest houses and, B&B: open	Guest houses and, B&B: closed	Self- catering: open	Self- catering: closed
January	50	131	3	25	69	533

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February	59	124	3	25	34	568
March	68	115	4	24	230	326

Table 1: Monthly sample size by sector, January to March 2021 (continued)

	Static caravan: open	Static caravan: closed	Touring caravan: open	Touring caravan: closed	Hostels: open	Hostels: closed
January	0	19	0	25	0	22
February	0	19	0	25	0	21
March	0	19	0	25	2	20

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