



Llywodraeth Cymru
Welsh Government

RESEARCH

Wales tourism accommodation occupancy surveys: April to June 2021

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

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Introduction

This report covers the period when Alert Level 4 was in place. From 27 March, Wales became the first UK nation to lift travel restrictions within its borders as the stay local restrictions ended. Self-contained tourist accommodation, such as self-catering establishments and some hotels were permitted to re-open. The

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lifting of travel restrictions from 12 April saw visitors from the rest of the UK allowed to travel to Wales and stay overnight but only in self-contained accommodation which did not involve shared facilities. Further easing of restrictions were introduced from 17 May, when all accommodation businesses were allowed to reopen.

Main points

- With restrictions in the serviced accommodation sector still in place across the UK, serviced room occupancy during April was primarily from within Wales with room occupancy levels at 35%. With further restrictions lifted across the sector on 17 May, May and June saw room occupancy levels of 56% and 74% respectively from responding hotels.
- In the self-catering sector, both April (54%) and May (66%) saw unit occupancy levels return to similar levels seen in 2019 (58% and 65% respectively). June fared much better with unit occupancy levels peaking at 85% - 21 percentage points higher than the same month in 2019.
- Occupancy in the static caravans and holiday homes sector was somewhat higher in May and June when compared with the same months in 2019. June pitch occupancy peaked at 96% and was on a par with pitch occupancy levels usually seen in the peak summer months of July and August.
- Pitch occupancy across the touring caravan and camping parks in April was 25%, falling in May to 17%. However, pitch occupancy in June saw an upturn in occupancy levels to 36% although still below June 2019.
- With many hostels still closed during April, only 3% of bed spaces were occupied during April though only a small number of hostels reported data this month so results should be treated with caution. Both May and June saw the reopening of many hostels, with bed occupancy levels of 30% in both months, still much lower than levels seen in 2019 (59% and 65% respectively).

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Change in weighting

During several months of 2020 and the first three months of 2021, a significant number of hotels, guesthouses/B&B's were not open due to COVID-19 restrictions which limited serviced accommodation operating resulting in only a small number of hotels and guesthouse/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/B&B's which were open in the relevant month. Due to this, it should be noted that the hotel and guesthouse/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/B&B sections of this report.

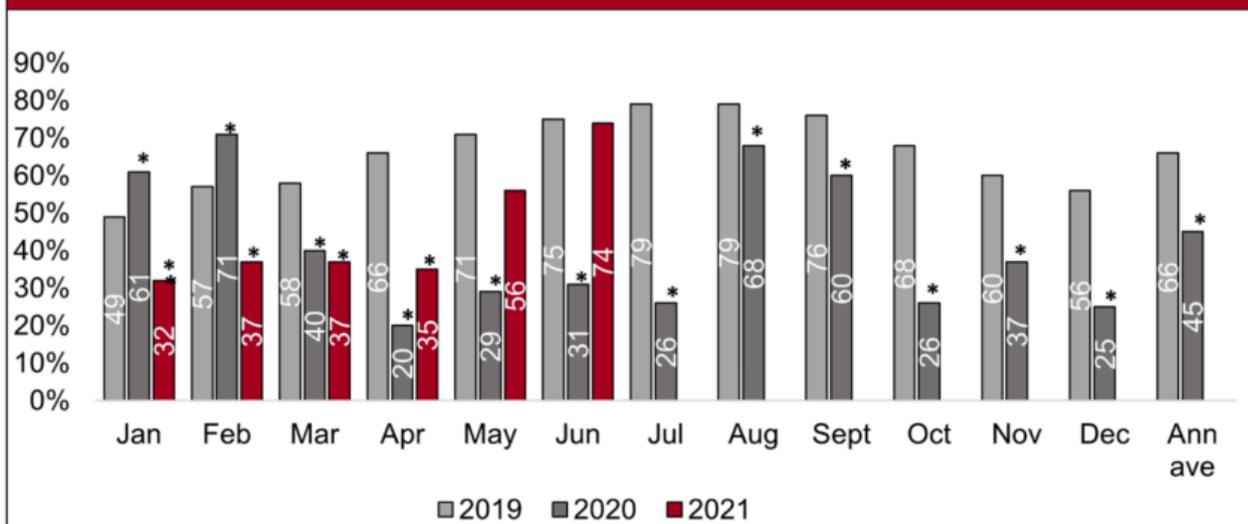
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Hotels

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



* Due to a change in methodology during 2020 and 2021, the hotel data shown within this report cannot be compared with previous years

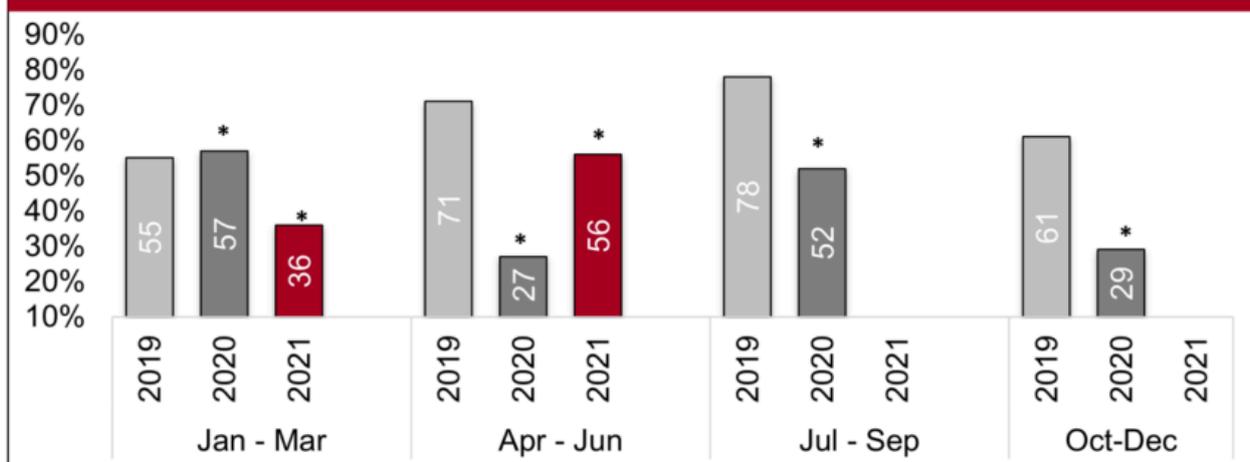
With restrictions in the serviced accommodation sector still in place across the rest of the UK, and movement in and out of Wales restricted to essential travel until 12 April, room occupancy during April was primarily from within Wales with room occupancy levels at 35%. With further restrictions lifted across the sector on 17 May, the months of May and June saw room occupancy levels of 56% and 74% respectively from responding hotels. Bed occupancy followed a similar pattern during this period.

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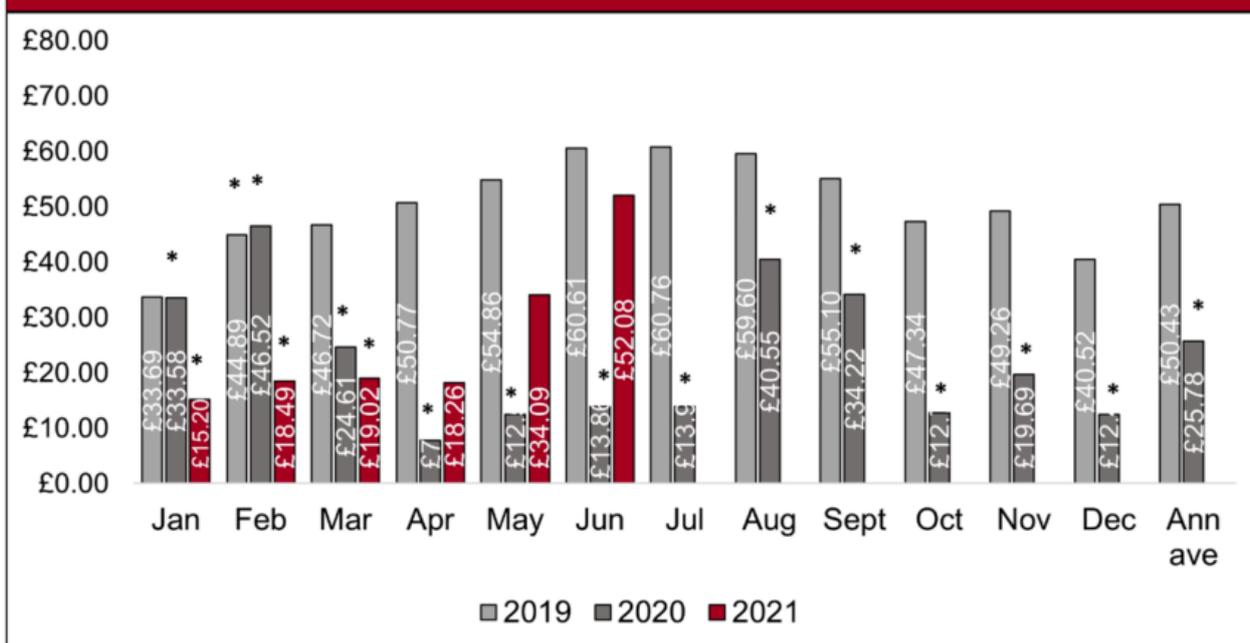
Chart 2: Quarterly room occupancy, hotels, 2019 to 2021



* Due to a change in methodology during 2020 and 2021, the hotel data shown within this report cannot be compared with previous years

On 12 April restrictions were lifted on visitors from outside of Wales. Restrictions on accommodation with shared services were lifted on 17 May and this was reflected in room occupancy levels in the second quarter of the year. Hotel room occupancy at 56% was double that of the same period in 2020 when serviced accommodation was temporarily closed, except to essential workers, due to the COVID-19 pandemic.

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



* Due to a change in methodology during 2020 and 2021, the hotel data shown within this report cannot be compared with previous years

With the easing of restrictions in the serviced accommodation sector from 17 May 2021, monthly revenue per available room for April, May and June was £18.26, £34.09 and £52.08 respectively, much higher than 2020 when serviced accommodation was only open for key workers during the lockdown period.

Guesthouses and, bed and breakfast

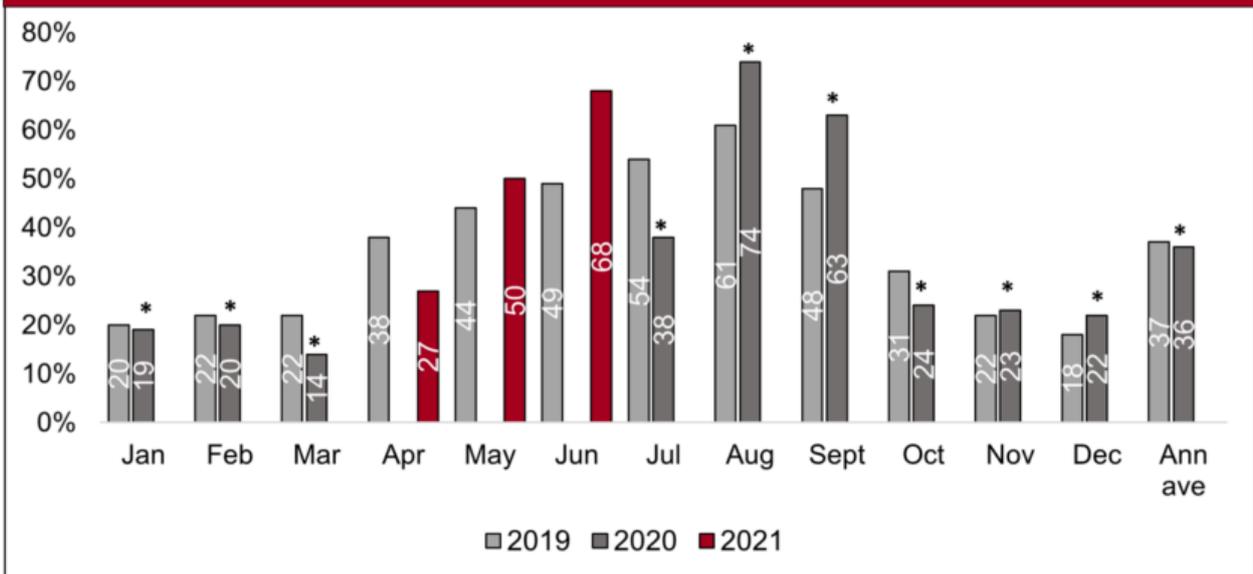
Although self-contained accommodation in guesthouses/B&B's were allowed to reopen on 27 March to visitors from within Wales, restrictions on travel to Wales were not lifted until 12 April and restrictions in serviced accommodation were not lifted until May 17. April recorded room occupancy levels of 27% with May increasing to 50% and June continuing the upward trend with 68% of rooms occupied during the month. Bed occupancy followed a similar pattern during this period.

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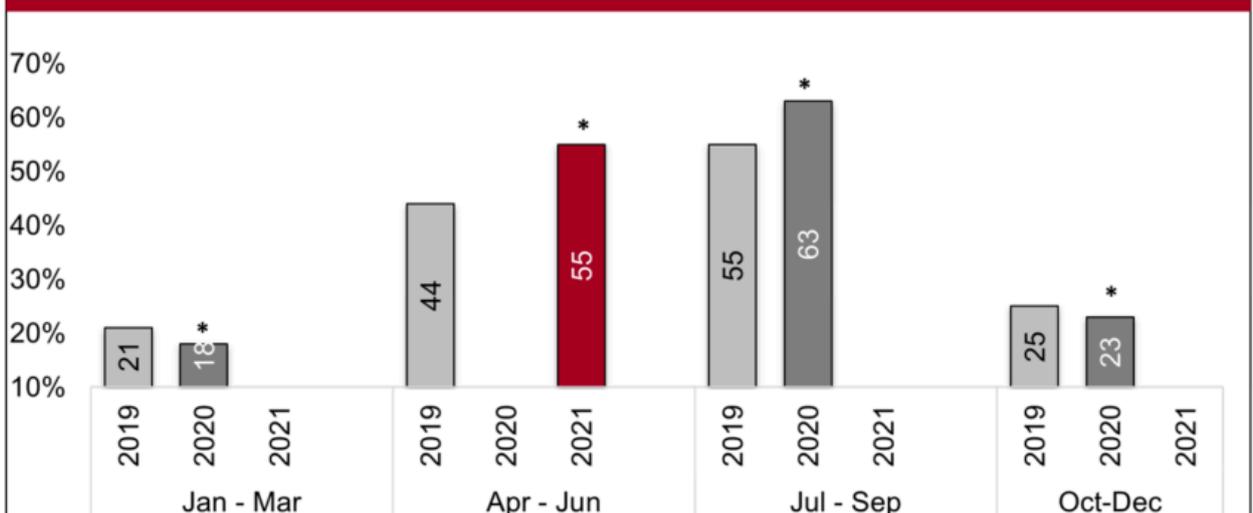
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Chart 4: Average monthly and annual room occupancy rates, guesthouses/B&B's, 2019 to 2021



* Due to a change in methodology during 2020 and 2021, the hotel data shown within this report cannot be compared with previous years

Chart 5: Quarterly room occupancy, guesthouses/B&B's, 2019 to 2021



* Due to a change in methodology during 2020 and 2021, the hotel data shown within this report cannot be compared with previous years

With many guesthouse/B&B establishments reopening during this period, room occupancy in the second quarter of the year, reached 55%. However, it should be noted that the sample size was fairly small, and results should be treated with

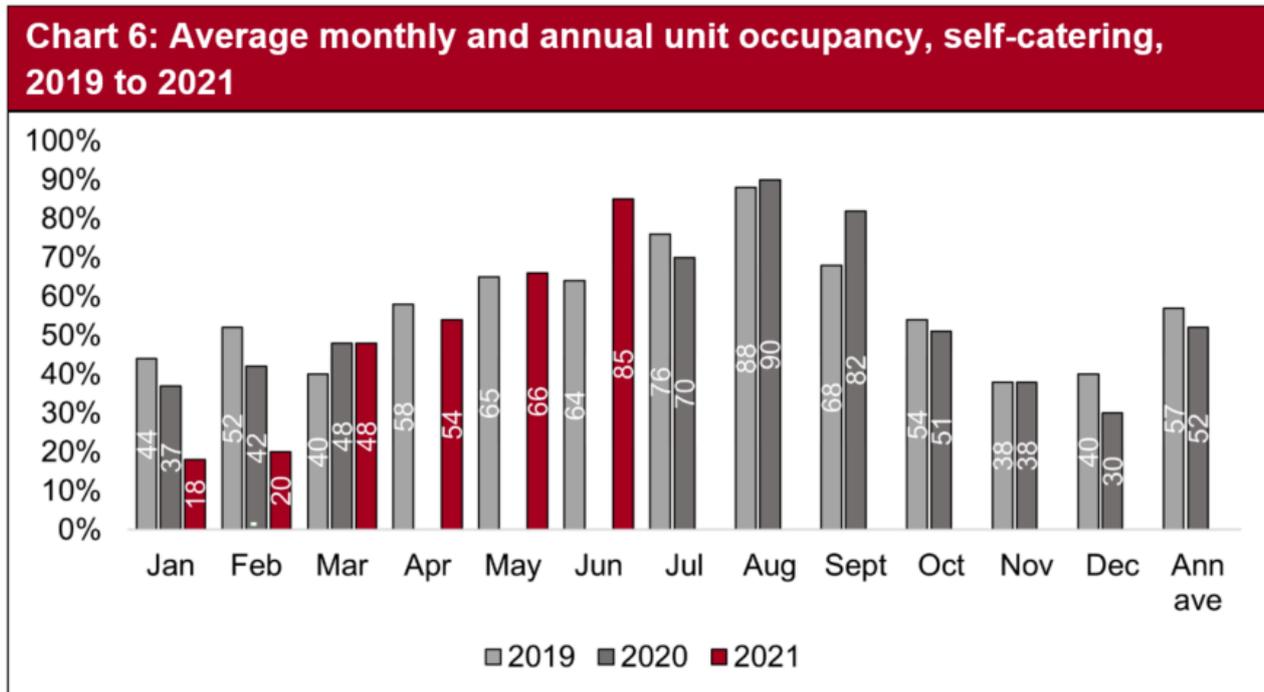
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a degree of caution.

Self-catering



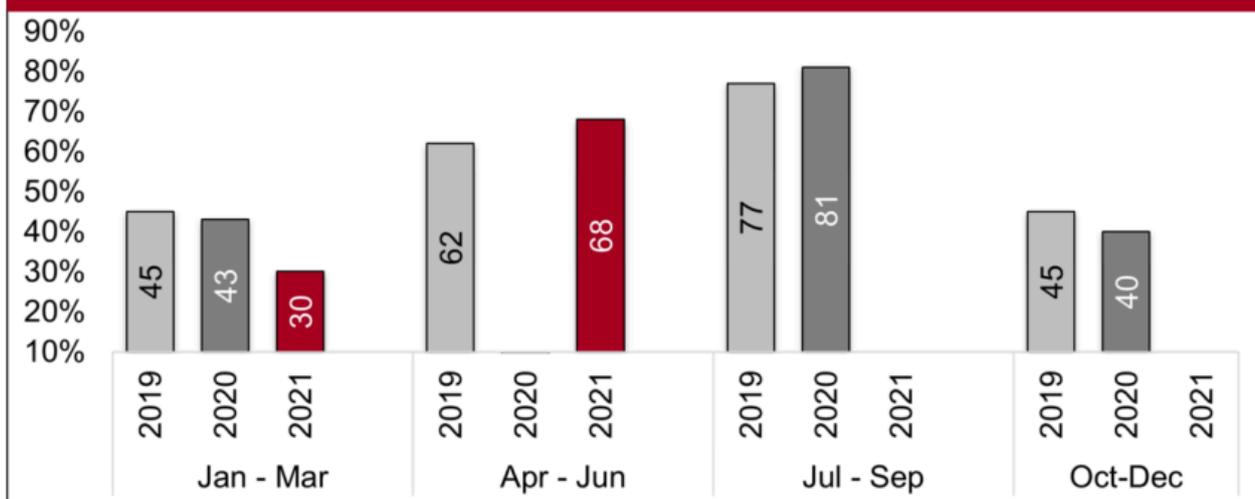
In the self-catering sector, both April (54%) and May (64%) saw unit occupancy levels return to similar levels seen in 2019 (58% and 65% respectively). June fared much better with unit occupancy levels peaking at 85%, 21 percentage points higher than the same month in 2019.

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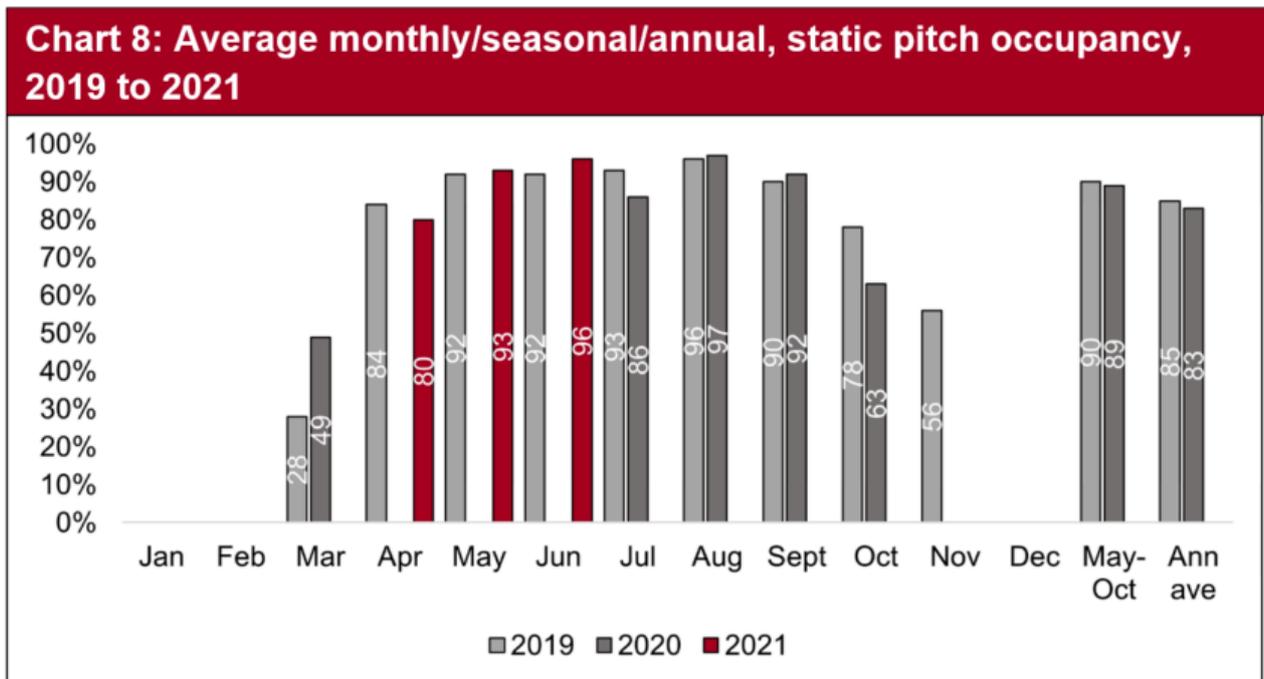
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Chart 7: Quarterly unit occupancy, self-catering, 2019 to 2021



With travel restrictions between nations within the UK lifted during April, the quarterly unit occupancy for April to June recorded levels of 68% during the second quarter of the year, above that of the same period in 2019. With lockdown restrictions in place across the UK in place during the same period in 2020, comparison data is not available for this period.

Static caravan holiday homes



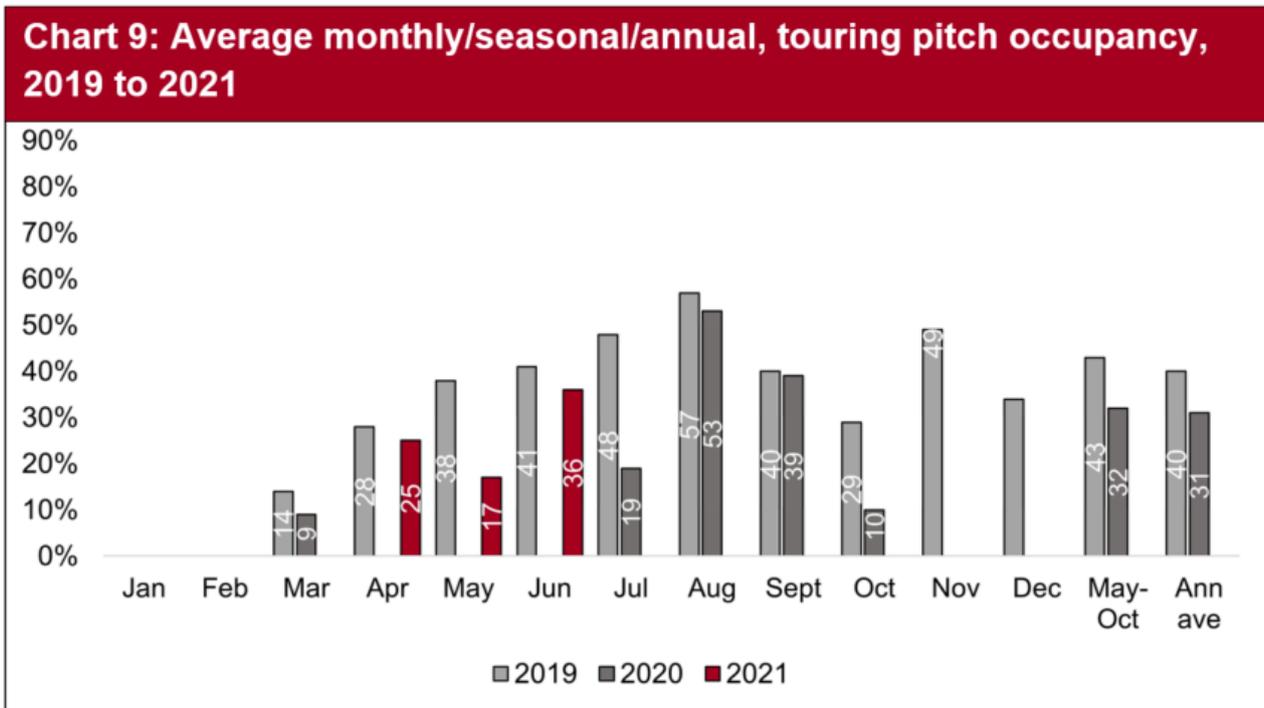
With restrictions lifted during the second quarter of the year, occupancy in the static caravans and holiday homes sector saw pitch occupancy levels higher in May and June when compared with the same months in 2019. June pitch occupancy peaked at 96% and was on a par with pitch occupancy levels usually seen in the peak summer months of July and August.

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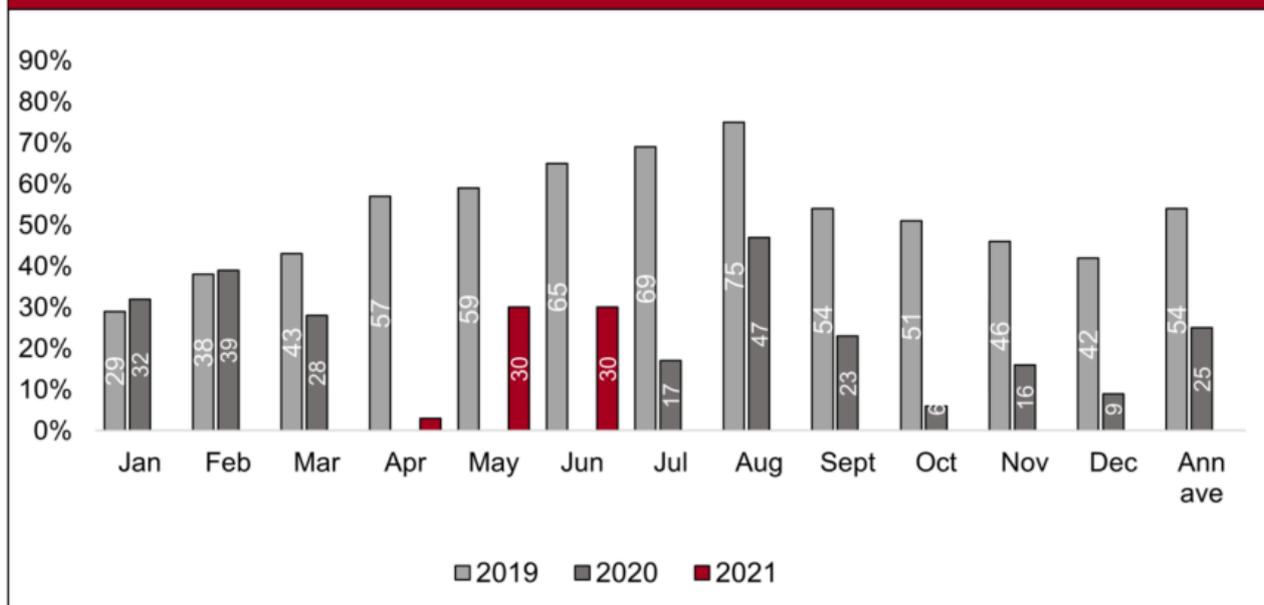
Touring caravan and camping parks



As with static caravan and camping parks, pitch occupancy across the touring caravan and camping parks in April was strong at 25%, but fell in May to 17%. However, pitch occupancy in June saw an upturn in occupancy levels to 36% although still below that of the same month in 2019.

Hostels

Chart 10: Average monthly and annual bedspace occupancy, hostels, 2019 to 2021



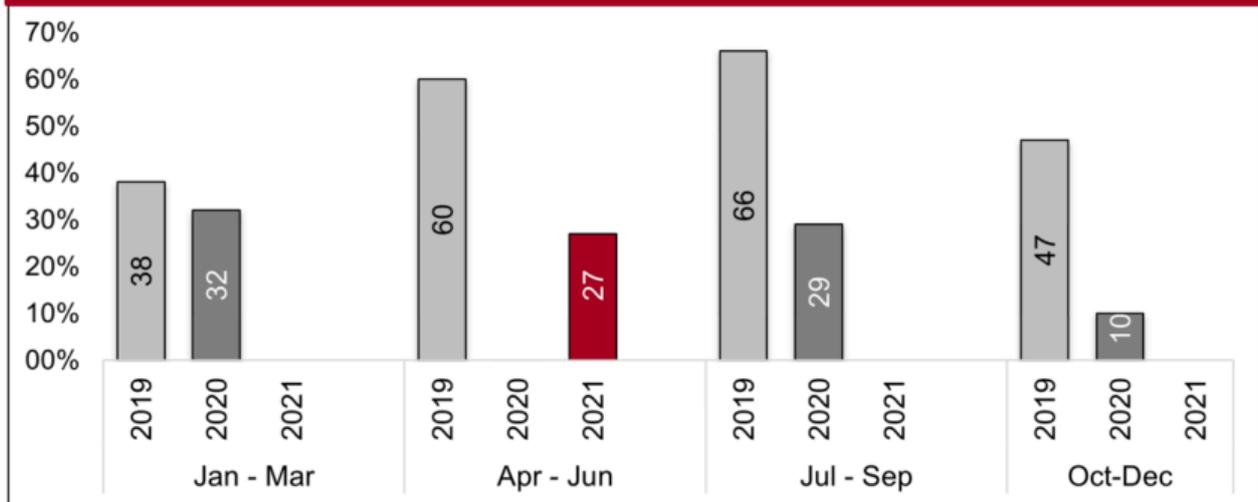
The nature of the sector had made it difficult to fully reopen with COVID-19 restrictions on the number of guests staying in hostels. With only 3% of bed spaces occupied during April, many hostels were still closed during the month, though only a small number of hostels reported data this month so results should be treated with caution. Both May and June saw the reopening of many hostels, with bed occupancy levels of 30% in both months, still much lower than levels seen in 2019 (59% and 65% respectively).

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Chart 11: Quarterly bedspace occupancy, hostels, 2019 to 2021



The sector had been severely affected by the closure of hostels during the COVID-19 pandemic and this was reflected in the quarterly figures for April to June. The average of 27% during the second quarter of the year was less than half that of the same quarter in 2019 (60%).

Context

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 self-catering properties and some hotels were permitted to re-open.

On 26 April, further easing of restrictions were introduced across Wales with outdoor amenities such as swimming pools were reopened, along with outdoor attractions, organised outdoor activities for up to 30 people and wedding receptions for up to 30 people were able to take place along with the reopening of outdoor hospitality.

From 17 May, remaining accommodation establishments and indoor hospitality were reopened along with pubs and restaurants who are allowed to serve drinks

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inside once again, while galleries and museums are also reopened.

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): 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.
- 12 April 2021 people from Wales are allowed to travel to other parts of the UK, and UK visitors are allowed to visit Wales.
- 26 April 2021 outdoor swimming pools, outdoor attractions, organised outdoor activities for up to 30 people and wedding receptions for up to 30 people can take place along with the reopening of outdoor hospitality.
- 17 May 2021 visitor accommodation with shared services, and indoor hospitality is reopened in the latest easing of restrictions, with pubs and

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restaurants allowed to serve drinks, while galleries and museums are also reopened.

Sample size

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 June 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
February	59	124	3	25	34	568
March	68	115	4	24	230	326
April	129	43	4	11	275	28
May	155	18	14	3	306	6
June	157	18	15	3	306	4

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Table 1: Monthly sample size by sector, January to June 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
April	15	2	8	7	5	15
May	16	1	12	1	18	1
June	17	0	13	0	19	0

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