RESEARCH

Wales tourism accommodation occupancy surveys: October to December 2020

The occupancy surveys provide trend information on the demand for tourist accommodation in Wales for October to December 2020.

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Contents

Due to a **change in the weighting methodology**, data for hotels, guesthouses and B&Bs has been revised. (15 July 2021)

Due to additional data becoming available for incorporation into the aggregate occupancy rate, figures for **static caravan occupancy** in July and August 2020 have been revised in this publication. (20 October 2021)

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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. Therefore, the sample sizes during these periods across all sectors can vary and extreme caution should be used when interpreting these results.

Main points

- Room occupancy in the final quarter of 2020 saw responding hotels reporting substantially lower occupancy levels across all 3 months of October, November and December (with occupancy levels of 26, 37 and 25% respectively). Bed occupancy levels followed a similar pattern.
- In the Self-Catering sector, both October and November remained fairly consistent with 2018 and 2019 unit occupancy levels. They fell by 3 percentage points in October and remained static in November compared with 2019. December saw occupancy rates down 10 percentage points on the same month in 2019.
- Occupancy levels in the static caravans and holiday homes sector fell during October by 13 and 15 percentage points each in both October 2018 and 2019. With businesses closed from 23 October for 17 days during the firebreak, many businesses then closed for the year with no data available for November and December 2020.
- Pitch occupancy across the touring caravan and camping parks fell significantly during October and November when compared with the same months in 2019.
- The nature of the hostel sector had made it difficult to fully reopen with COVID-19 restrictions on the number of guests throughout 2020. October, November and December all witnessed a significant fall in bedspace occupancy levels with October down 45 percentage points, November down 33 and December down 44 percentage points when compared with the same months in 2019.

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Change in weighting

During several months of 2020, a significant number of hotels, and guesthouses/ B&Bs were not open due to COVID-19 restrictions which limited serviced accommodation operating, resulting in only a small number of hotels and guesthouse/B&Bs 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 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 cannot be interpreted as representing the serviced accommodation market as a whole, and given the methodological differences, is not comparable to 2018 and 2019 data shown within the hotel and guesthouse/B&B sections of this report.

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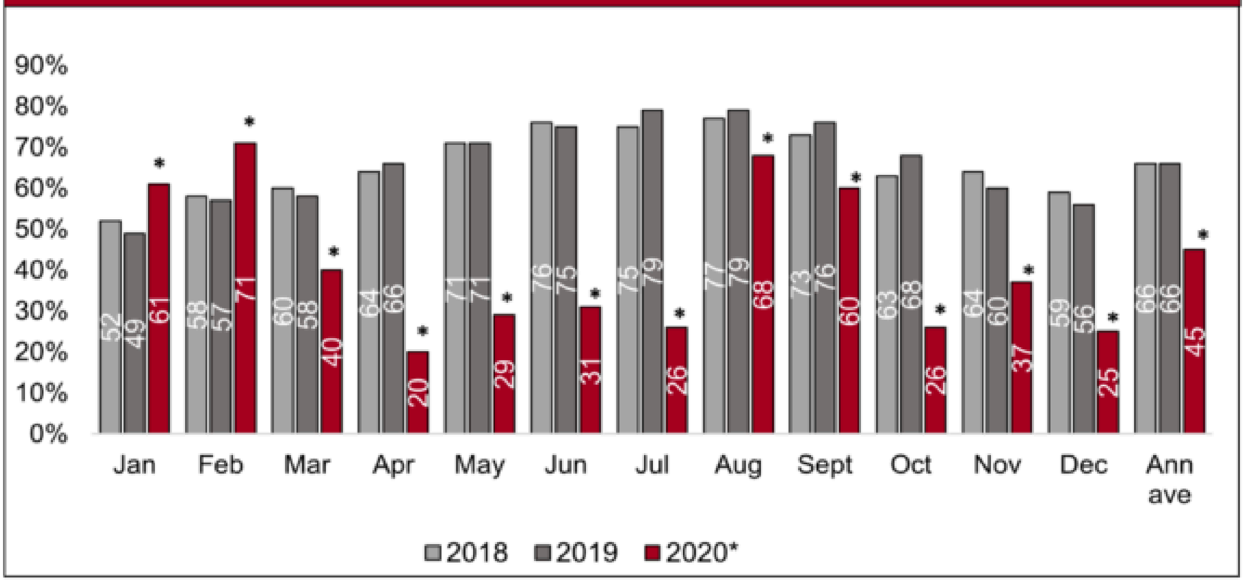
Hotels

Chart 1: Average monthly and annual room occupancy rates, hotels, 2018 to 2020



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

Room occupancy [footnote 1] in the final quarter of 2020 saw responding hotels reporting substantially lower occupancy levels across all 3 months of October, November and December. Bed occupancy levels followed a similar pattern. On the 1 October, Conwy, Denbighshire, Flintshire and Wrexham followed by Bangor on the 10 October saw local lockdowns imposed. A firebreak lockdown across Wales took place from 23 October to 9 November. New restrictions began from midnight on 19 December (Alert Level 4) which restricted the movement of people and saw the closure of accommodation businesses except for essential use.

As previously mentioned, with a significant number of hotels closed due to COVID-19 restrictions, resulting in only a small number of hotels providing data across several months, the annual average hotel occupancy fell across the year as a whole This is reflected in the different periods affected by the lockdown from 23 March through to 11 July, where only essential guests were occupying

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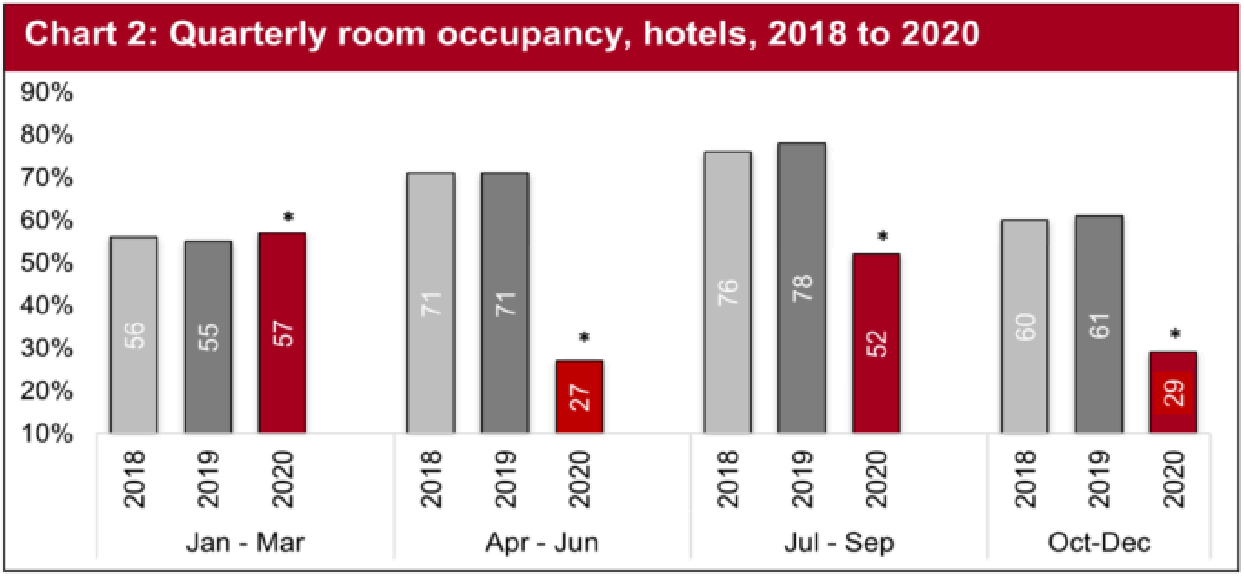
the small number of hotels that were open. Both August and September saw the number of open establishments increase although capacity may have still been reduced during this period due to COVID-19 restrictions. Bedspace occupancy rates witnessed a similar pattern during this period.

[1] Some occupancy rates for individual hotels may be slightly higher than they would have been in a normal year as some rooms/units may have been taken out of operation due to the need for social distancing. The data reported during October to December is based on net occupancy which refers only to those businesses that were open and who provided data during this period.



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

Room and bedspace occupancy were affected across all four quarters of the year, with October to December quarterly average at 29 percentage points.

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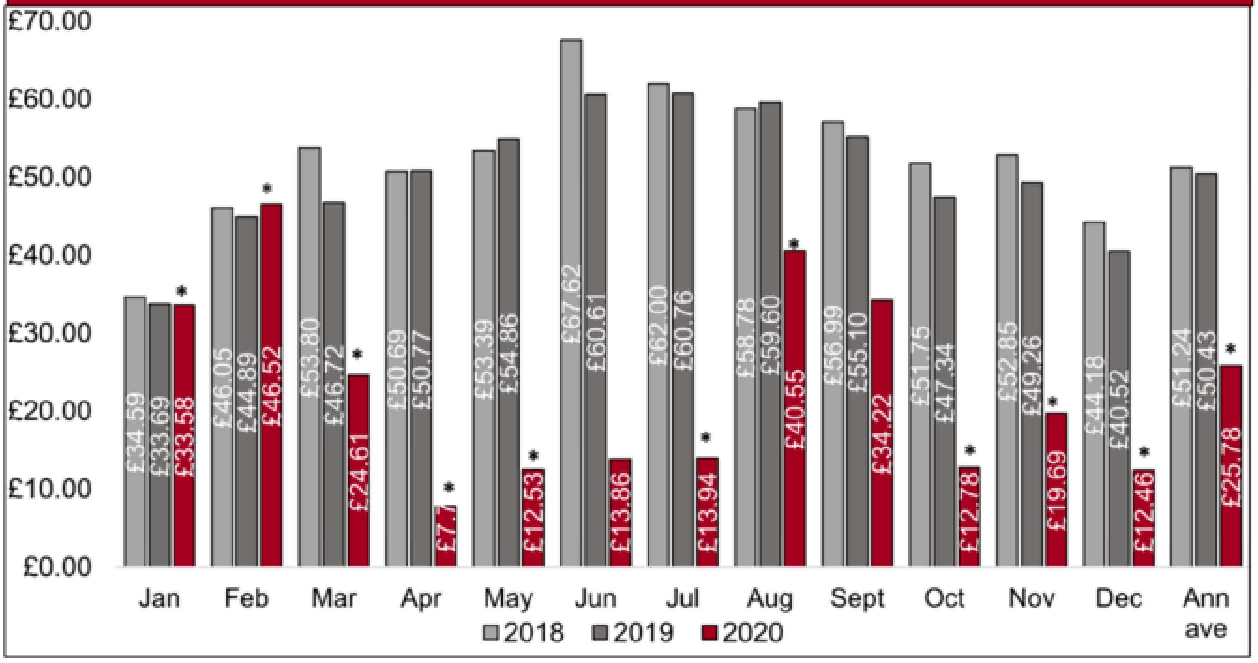
Chart 3: Monthly and annual RevPar, hotels, 2018 to 2020



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

With local restrictions in place in Conwy, Denbighshire, Flintshire, Wrexham and Bangor, only a small number of hotels were open to key workers during the period of mandatory firebreak for 17 days from 23 October. Compared with the first two months of the year, RevPAR data was considerably lower during the last quarter of 2020.

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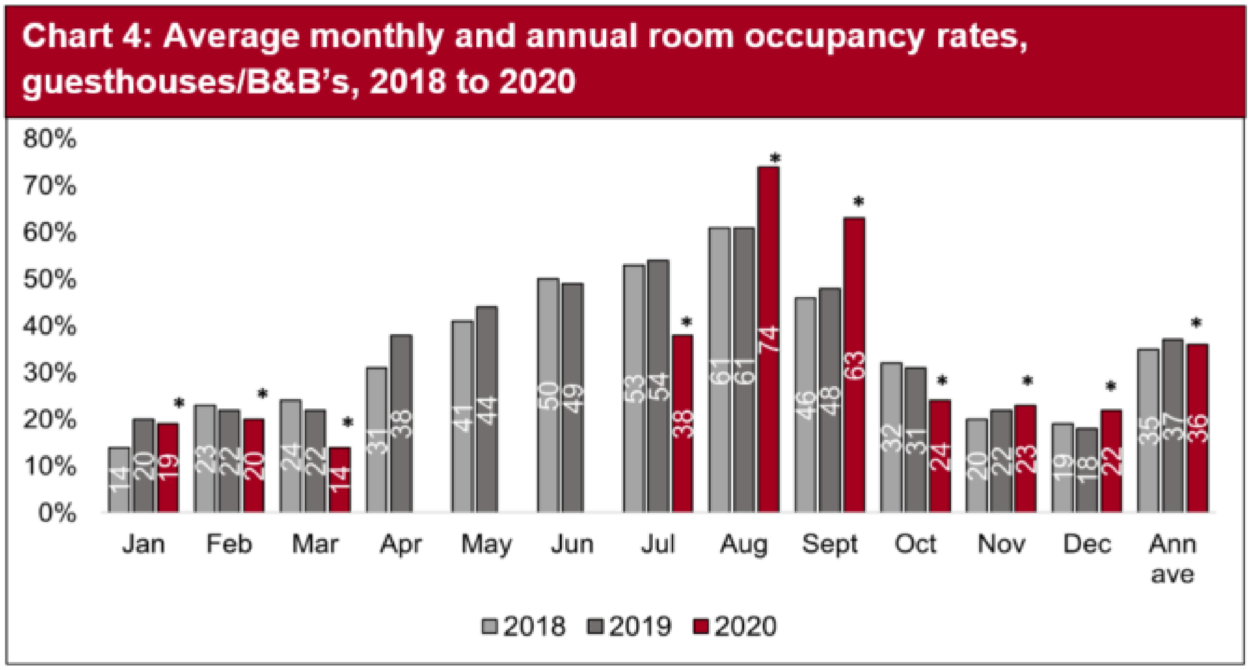
Guesthouses and, bed and breakfast



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

Most guesthouses/B&Bs did not offer accommodation to key workers and subsequently the majority of establishments were closed completely during the firebreak lockdown from 23 October to 9 November and therefore data was not collected during this period. In addition, the sample size for this sector is historically very low and should be interpreted with caution. As with the hotel sector this is reflected in the different periods affected by the lockdown from 23 March through to 11 July, where only a very small number of guesthouse/B&Bs were open. Businesses in the summer months of August and September saw the number of open establishments increase although capacity may have still been reduced during this period due to COVID-19 restrictions. Bedspace occupancy rates witnessed a similar pattern during this period.

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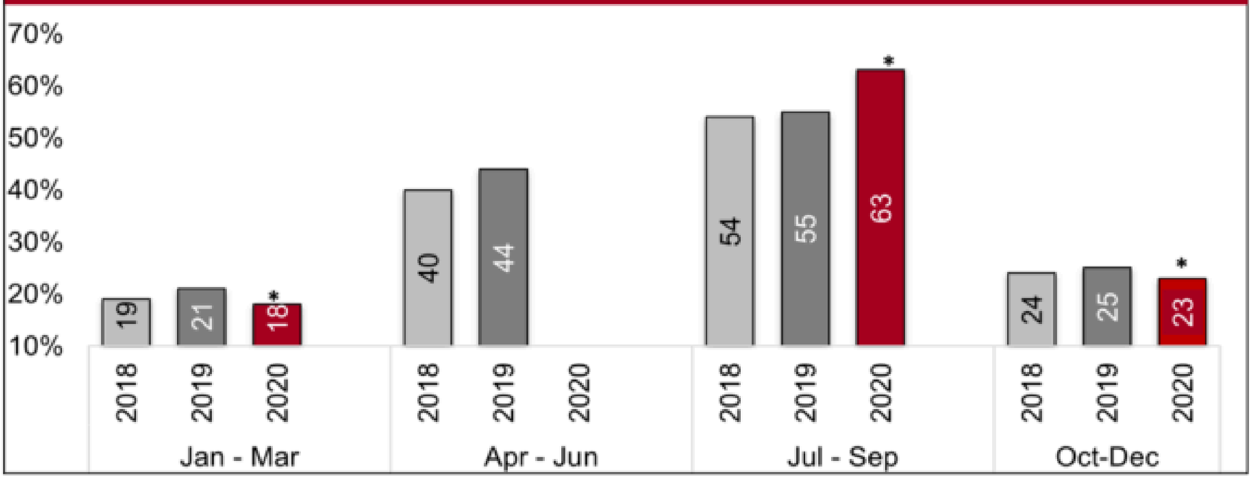
Chart 5: Quarterly room occupancy, guesthouses/B&B's, 2018 to 2020



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

Room and bedspace occupancy were affected across the three quarters of the year for which figures are reported, with the final quarter of October to December occupancy average at 23%.

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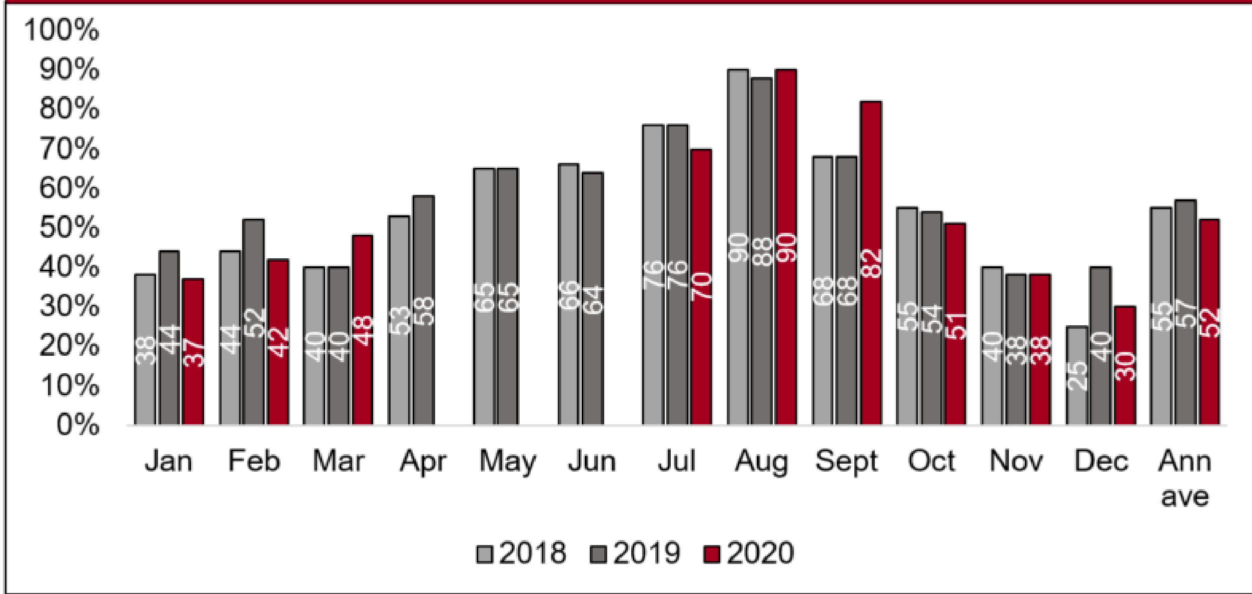
Self-catering

Chart 6: Average monthly and annual unit occupancy, self-catering, 2018 to 2020



In the self-catering sector, both October and November was consistent with 2018 and 2019 unit occupancy levels. They fell by 3 percentage points in October and remained static in November compared with 2019. December saw occupancy rates down 10 percentage points on the same month in 2019.

Excluding the first lockdown from 23 March to 11 July, the self-catering sector has fared better than the serviced sector during 2020. January to December 2020 year to date average, at 52%, saw a fall of 5 percentage points on 2019 and 3 percentage points on 2018.

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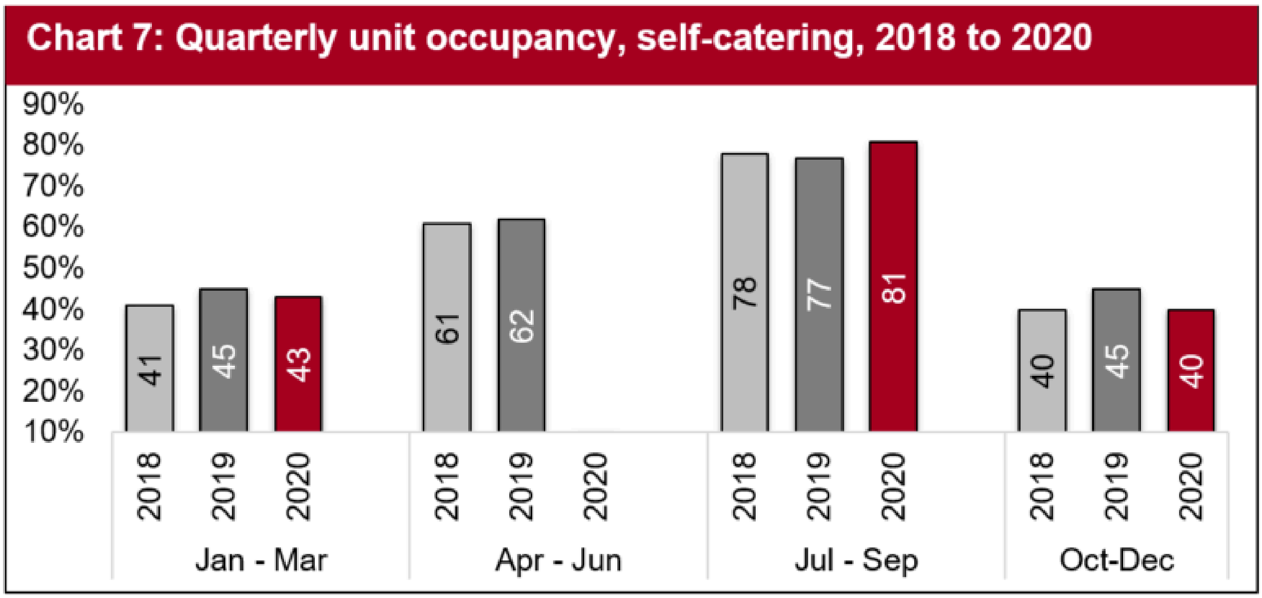

The quarterly unit occupancy for October to December fell by 5 percentage points from 45% to 40% when compared with the same period in 2019 but was on a par levels seen in 2018.

With the exception of the April to June quarter in 2020, unit occupancy in January to March had seen a small downturn in occupancy levels whilst July to September 2020 saw unit occupancy increase when compared with both 2018 and 2019 respectively.

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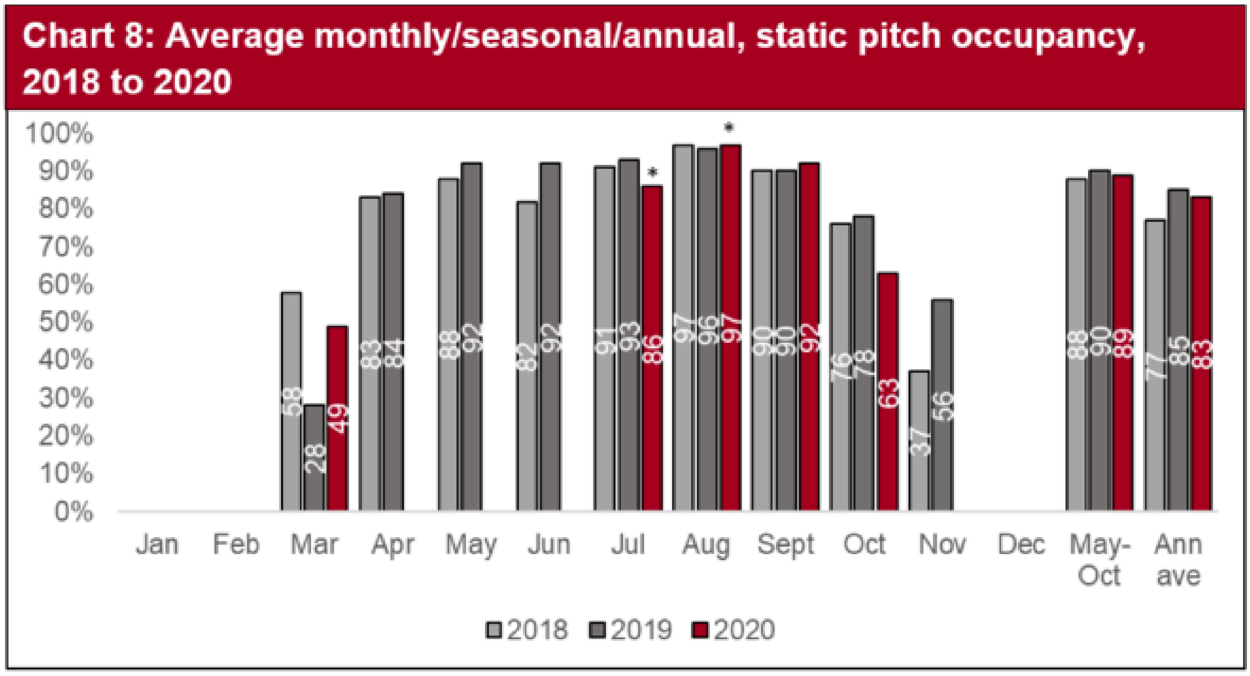
Static caravan holiday homes



*(r) July and August 2020 figures have been revised in this publication.

Occupancy in the static caravans and holiday homes sector fell during October from 78% in 2019 to 63% in 2020, a fall of 13 and 15 percentage points each on both October 2018 and 2019. With local lockdowns in place during early October followed by the 17 day firebreak lockdown from 23 October, many businesses had then closed for the year with no data available for both November and December 2020.

Both the May to October and annual average recorded similar levels to previous years with May to October 2020 unit occupancy at 89% compared with 88% in 2018 and 90% in 2019. The annual average in 2020 reached 83%, a 2 percentage point fall against 2019 at 85%, but higher than 2018 which recorded a unit occupancy of 77%. However, it should be noted that both the annual and seasonal averages are based on those establishments that were open during these periods.

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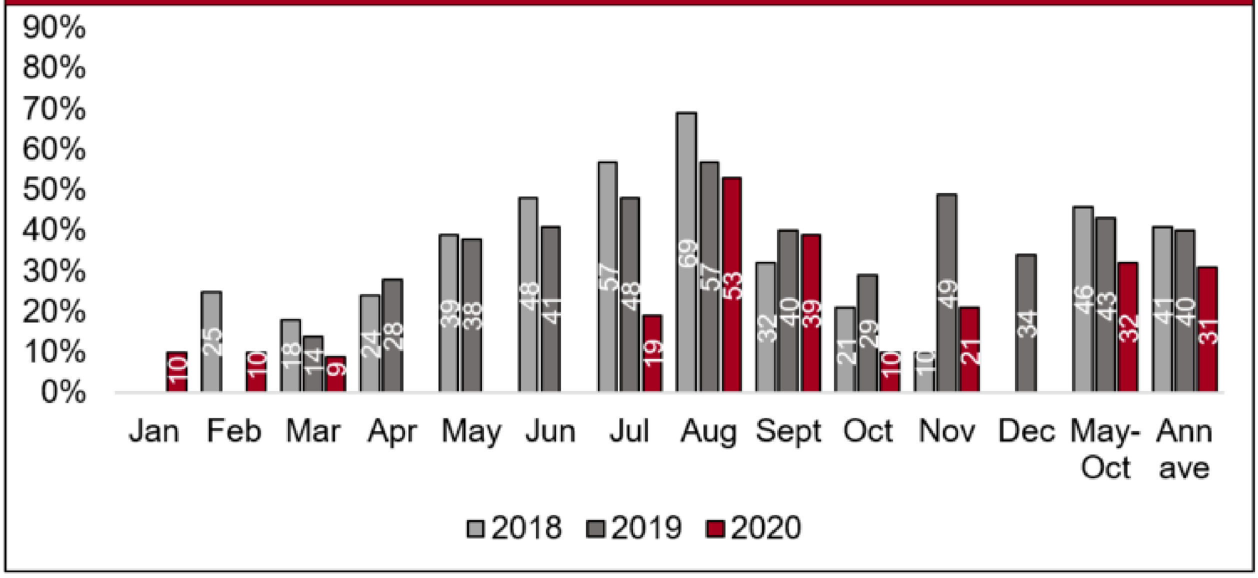
Touring caravan and camping parks

Chart 9: Average monthly/seasonal/annual, touring pitch occupancy, 2018 to 2020



Pitch occupancy across the touring caravan and camping parks fell significantly during October and November when compared with the same month in 2019. Once again the local lockdowns and the firebreak saw businesses close and not reopen their sites for the rest of the year. The 6 month main period for the sector from May to October saw a downturn in pitch occupancy of 14 and 11 percentage points on 2018 and 2019 respectively.

Across the year as a whole, pitch occupancy levels had fallen 9 percentage points, down from 40% in 2019 to 31% this year.

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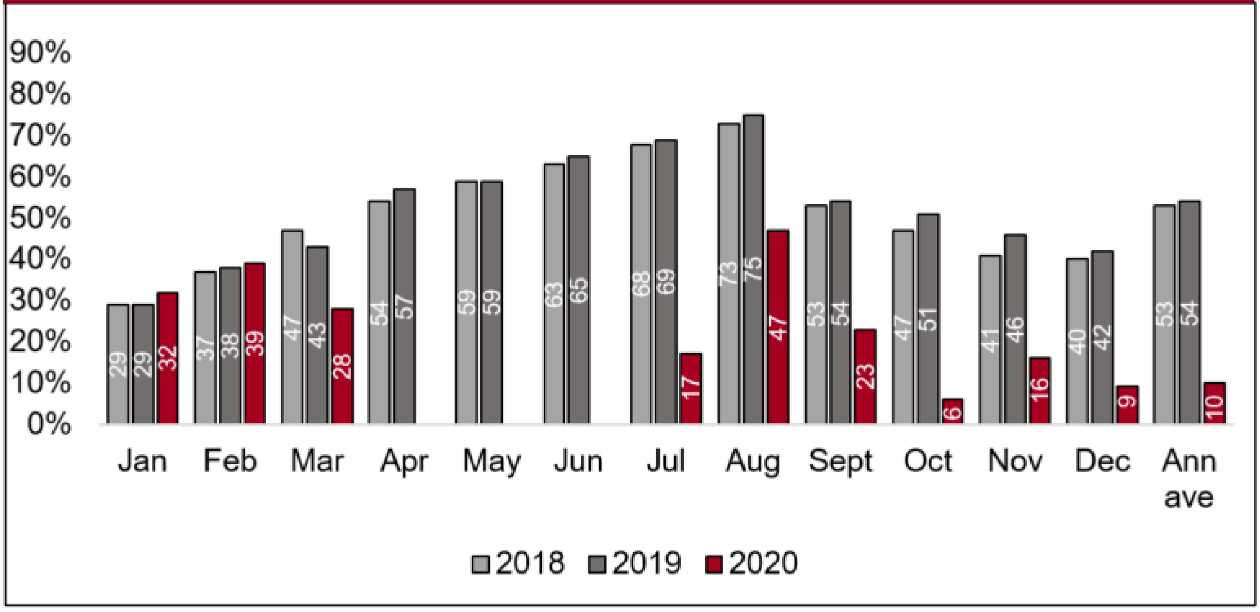
Hostels

Chart 10: Average monthly and annual bedspace occupancy, hostels, 2018 to 2020



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. October, November and December all witnessed a significant fall in bedspace occupancy levels with October down 45 percentage points, November down 33 and December 44 percentage points when compared with the same quarter in 2019.

Across the year as a whole, hostel bedspace occupancy had fallen by 44 percentage points in the period January to December 2020.

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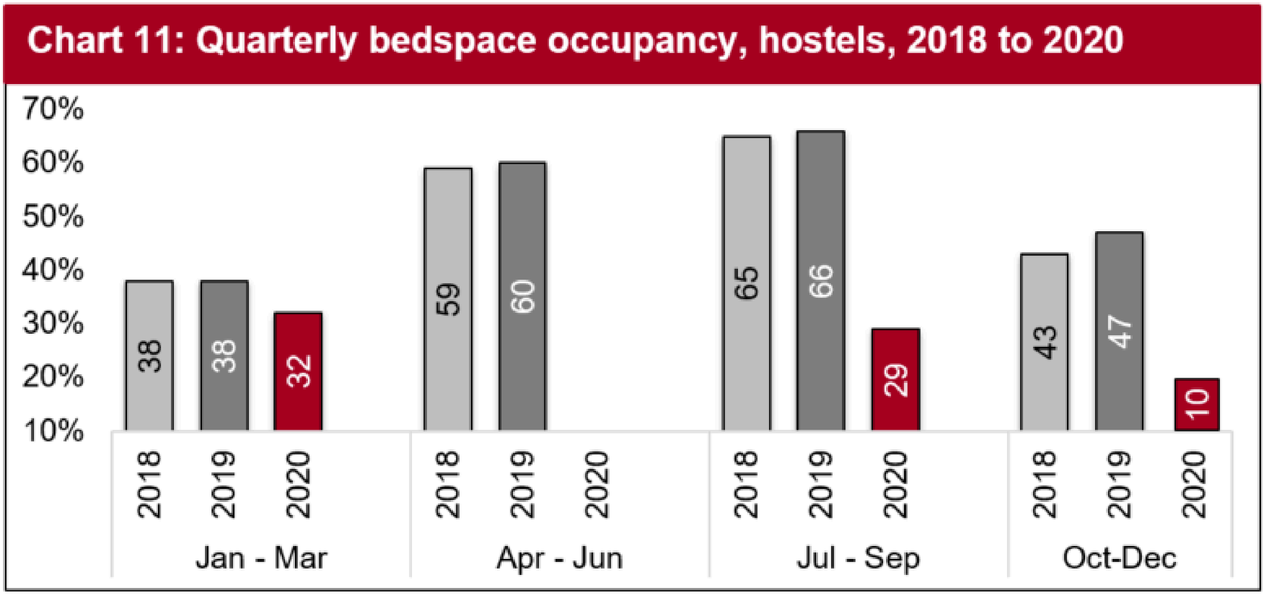

The occupancy levels for the final quarter of 2020 fell by 37 percentage points when compared with the same period in 2020. As previously mentioned, the nature of the hostel and bunkhouse accommodation was a key factor in the downturn in occupancy levels, with restrictions on the numbers staying in the multi-occupied rooms.

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 previous years in 2018 and 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

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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 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.

Main timelines in 2020

- UK National Lockdown from 23 March 2020.
- 6 July Wales lifts its “Stay Local” travel restrictions and outdoor attractions were allowed to re-open.
- Lockdown ends 11 July for accommodation businesses without shared facilities.
- 13 July re-opening of indoor visitor attractions but excluding any part of a visitor attraction which is underground.

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- Tourist accommodation with shared facilities such as camping sites were able to re-open from 25 July but any shared facilities on the premises remained closed, such as swimming pools, leisure facilities, shared shower and toilets blocks.
- 27 July museums and galleries allowed to reopen.
- Eat Out to Help Out Scheme (3 to 31 August)
- 7 September residents of **Caerphilly County Borough Council** are made subject to the first local lockdown in Wales, which takes effect from 6pm on 8 September. 17 September Rhondda Cynon Taf subject to local lockdown restrictions.
- 21 September lockdown restrictions are announced for **Merthyr Tydfil**, **Bridgend**, **Blaenau Gwent** and **Newport** with effect from 6pm on 22 September.
- 26 September Wales's first town-only lockdown comes into force in Llanelli.
- 27 September local lockdowns in Cardiff and Swansea.
- 28 September lockdown measures are announced for **Neath Port Talbot**, **Torfaen** and **Vale of Glamorgan**, meaning that two thirds of Wales's population are subject to lockdown measures.
- 1 October Conwy, Denbighshire, Flintshire and Wrexham go into lockdown.
- 10 October lockdown restrictions announced for Bangor.
- 23 October Wales begin a 17-day firebreak lockdown.
- 9 November firebreak ends in Wales.
- 19 December Christmas bubble rules changes to only allow two families to get together on Christmas Day.
- 19 December 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 Wales enters lockdown (alert level 4) after rules were briefly relaxed over Christmas Day.

Sample size

When the national lockdown began on 23 March, almost all accommodation businesses across Wales temporarily closed with the exception of a small

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number of large hotels who remained open to provide temporary accommodation to key workers and other groups affected by the pandemic. Although lockdown ended on 11 July, and sample sizes began to increase, not all business re-opened immediately. By September, sample sizes were beginning to return to the levels seen in the early months of 2020, but uncertainty across the sectors was still apparent. It is worth noting that the lower self-catering sample in September is not related to the COVID-19 pandemic but the change in ownership of one of the large agencies who supply occupancy data and therefore data was not available during this month.

With local restrictions still in place across several towns and a national firebreak lockdown from 23 October to 9 November some businesses in the serviced accommodation sector decided not to reopen their doors at this time, although the larger hotels were still open during this period reflected in the sample sizes in the last three months of the year. Alert Level 4 restrictions began on the 19th December, 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. Each of the monthly samples sizes by sector shown below are those businesses that were open and provided data in their return for that month.

Table 1: Monthly sample size by sector, 2020

	Hotels		Guest houses and, bed and breakfast		Self-catering	
	Open	**Closed**	**Open**	**Closed**	**Open**	**Closed**
January	175	6	20	7	856	84
February	170	4	20	6	627	89
March	163	18	18	10	759	104
April	19	162	1	27	3	736

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	Hotels		Guest houses and, bed and breakfast		Self-catering	
May	20	161	2	26	0	739
June	22	164	1	27	0	740
July	126	56	13	12	950	17
August	162	16	17	6	945	19
September	162	13	18	7	653	17
October	163	19	16	10	533	22
November	126	28	13	11	326	113
December	125	52	9	16	404	26

Table 1: Monthly sample size by sector, 2020 (continued)

	Static caravan		Touring caravan		Hostels	
	Open	**Closed**	**Open**	**Closed**	**Open**	**Closed**
January	2	20	2	32	21	0
February	2	20	2	32	18	1
March	11	11	6	28	18	2

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	Static caravan		Touring caravan		Hostels	
April	0	22	0	34	0	20
May	0	22	0	33	0	21
June	0	22	0	33	0	21
July	18	1	18	7	20	1
August	18	1	18	6	20	1
September	17	2	16	6	21	0
October	17	3	19	6	20	1
November	1	13	1	17	19	2
December	1	13	0	16	19	2

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