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Welsh Government

RESEARCH

Wales tourism accommodation occupancy surveys: October to December 2021

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

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Introduction

This update summarises the top line results of the Wales Accommodation Occupancy Survey. Results for this survey are reported for the period October to December 2021 compared with 2019 and 2020, as well as the quarterly averages for these periods. The exception to this are the hotel and guesthouse/

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B&B sectors where due to a methodological change in 2020 and 2021, comparisons with 2019 cannot be made. Figures are provisional and may be subject to final revision.

Main points

- During October, hotel room occupancy saw an upturn of 49 percentage points on the same month in 2020 when room occupancy was at 37%, when many hotels were still not fully operating following COVID-19 restrictions. Both November and December saw higher room occupancy levels than the previous year (69% and 56% compared with 37% and 25% respectively). Bed occupancy followed a similar pattern during this period.
- In October, guesthouse/B&B's recorded room occupancy levels of 61%, 10 percentage points lower than the previous month of September. Room occupancy levels in the final two months of the year was 32% in November and 29% in December, although it should be noted that the sample size is small and should therefore be treated with caution when interpreting these results. Bed occupancy followed a similar pattern during this period.
- Across the self-catering sector, unit occupancy levels fared well during October at 74%, 23 percentage points up on the same month in 2020. November saw levels falling to 34%, slightly down on the two previous years by 4 percentage points respectively. December saw an upturn in unit occupancy with levels at 55%, 15 and 25 percentage points higher than both 2019 and 2020.
- In the static caravans and holiday homes sector during October occupancy was 93%, on a par with the previous month of September, with a noticeable increase of 15 and 30 percentage points each on both October 2019 and 2020. November pitch occupancy at 58% was slightly above that of 2019 with data for 2020 not available. With many operators closing for the season, data for December is not available.
- As with the static caravan and holiday parks, pitch occupancy across the touring caravan and camping parks fell during the month of October but was still above pitch occupancy in 2019 and 2020 (29% and 10% each).
- October saw bed occupancy across the hostel sector reach 38%, 32

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percentage points above that recorded in 2020. November bed occupancy levels rose to 38% compared with only 16% in 2020, however, this was still below that seen in November 2019 (46%). A similar pattern was seen in December with occupancy levels at 31%, significantly higher than December 2020 but not at the same levels seen in December 2019 (42%).

Change in weighting

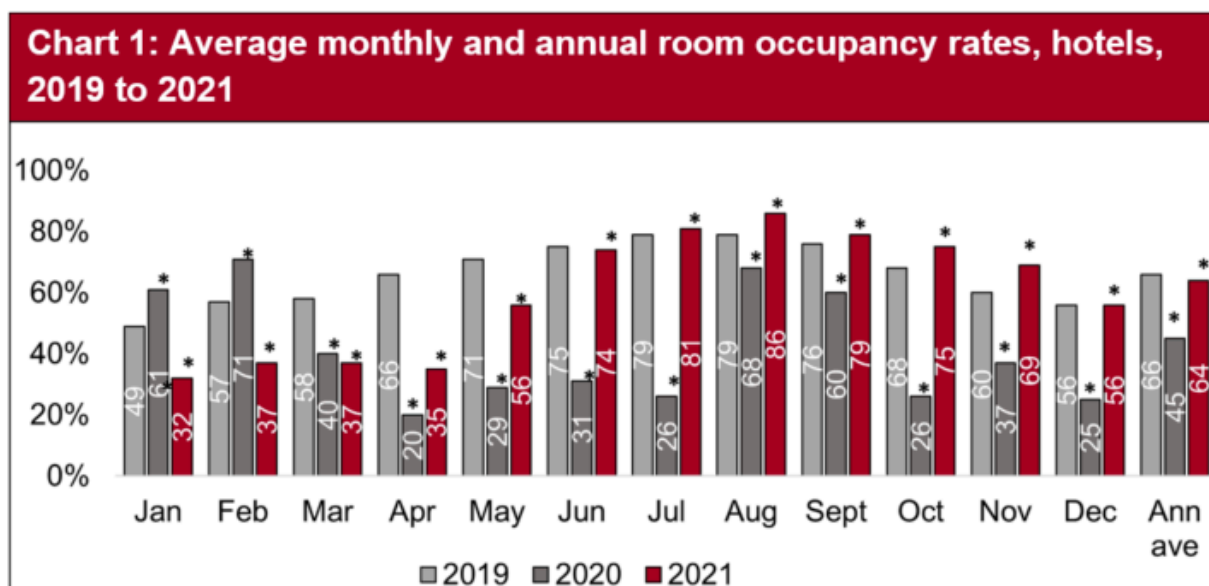
During several months of 2020 and the first three months of 2021, a significant number of hotels, guesthouses/B&B's were not open due to COVID-19 restrictions which limited serviced accommodation operating resulting in only a small number of hotels and guesthouse/B&B's providing data, which impacted 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



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

During October, hotel room occupancy saw an upturn of 49 percentage points on the same month in 2020 when room occupancy was at 26%, when many hotels were still not fully operating following Covid-19 restrictions. Both months of November and December saw higher room occupancy levels than the previous year, (69% and 56% compared with 37% and 25% respectively). Bed occupancy followed a similar pattern during this period.

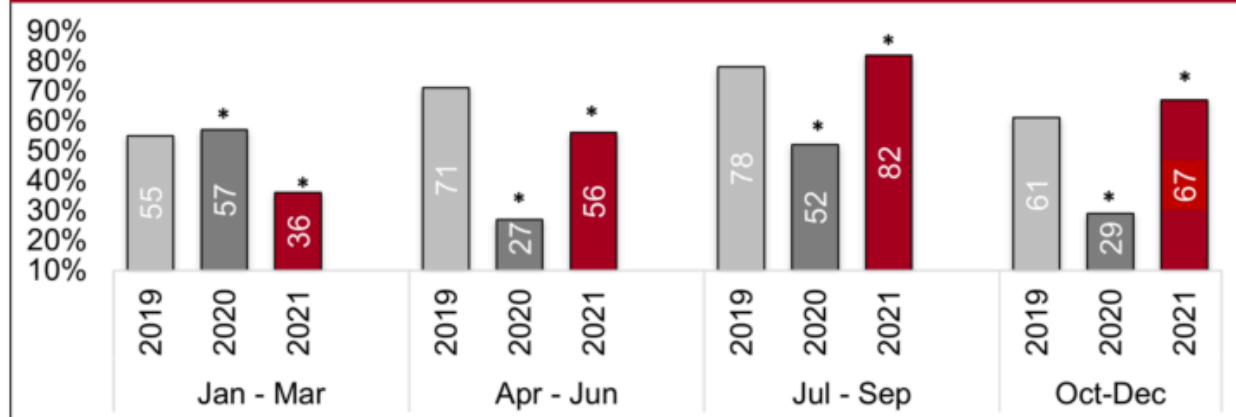
The annual average across the 12 month period was significantly higher in 2021 at 64%, an increase of 19 percentage points on 2020.

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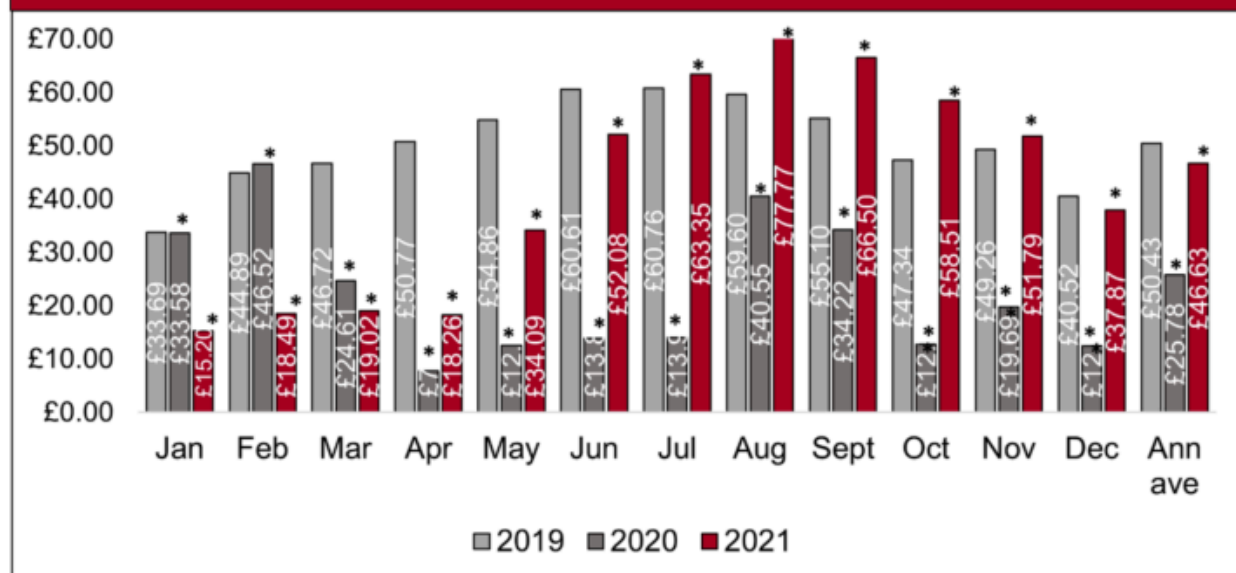
Chart 2: Quarterly room occupancy, hotels, 2019 to 2021



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

Hotels had the second highest room occupancy levels for 2021 in the fourth quarter (October to December) at 67%. This was 38 percentage points higher than the same period in 2020 when businesses were still affected by COVID-19 operating restrictions.

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

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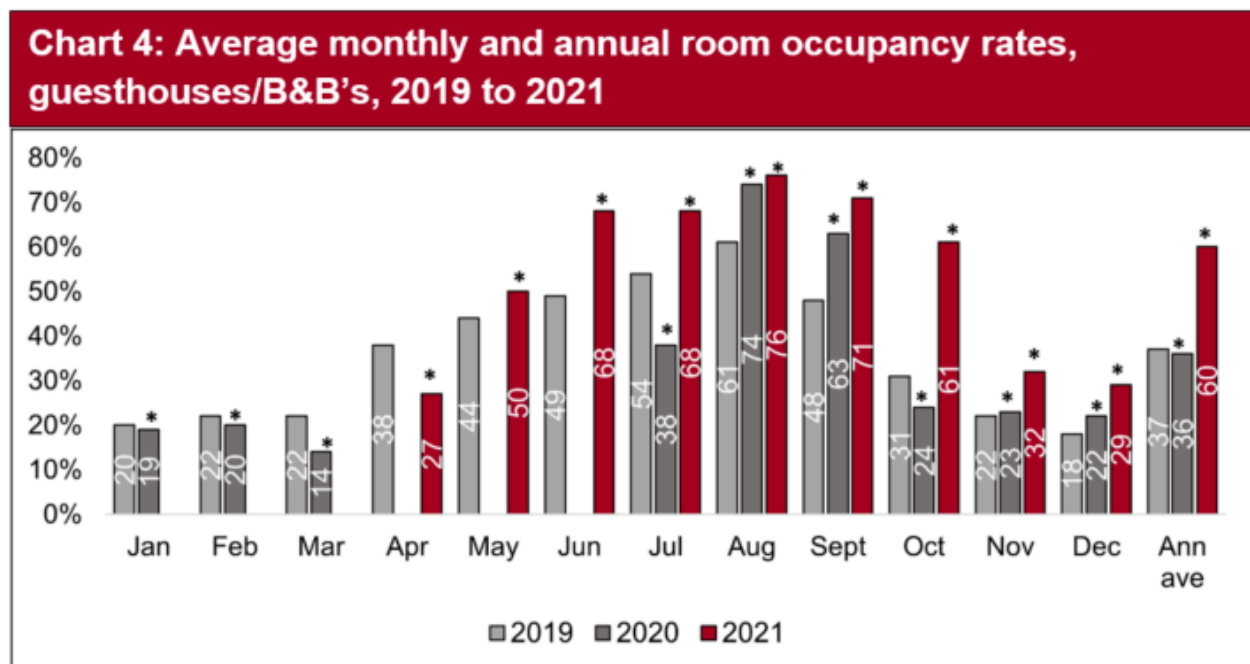
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Average revenue per available room for the winter months of October, November and December was £58.51, £51.79 and £37.87 respectively. October had the highest revenue per available room during the final quarter of the year, significantly higher than that of the same month in 2020 (£12.46). Annual revenue per available room was £46.63, an increase of £20.85 on 2020.

Guesthouses and, bed and breakfast

In October, guesthouse/B&B's recorded room occupancy levels of 61%, 10 percentage points lower than the previous month of September. Room occupancy levels in the final two months of the year was 32% in November and 29% in December. The average room occupancy for the whole of 2021 was significantly higher than the previous year although it should be noted that the sample size is small and should therefore be treated with caution when interpreting these results. Bed occupancy followed a similar pattern during this period.



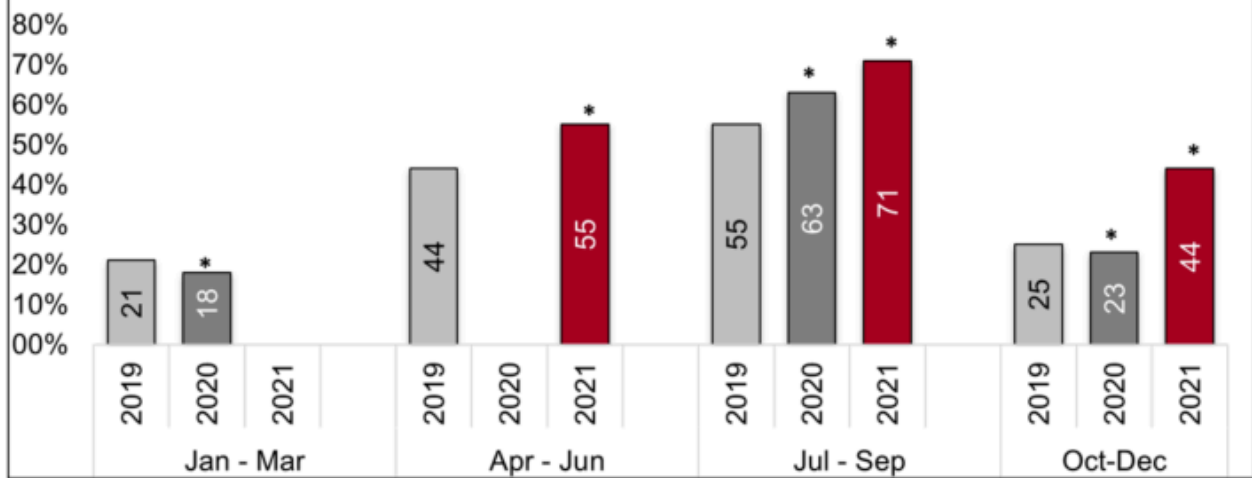
* Due to a change in methodology during 2020 and 2021, the hotel data shown within this report cannot be compared with previous years

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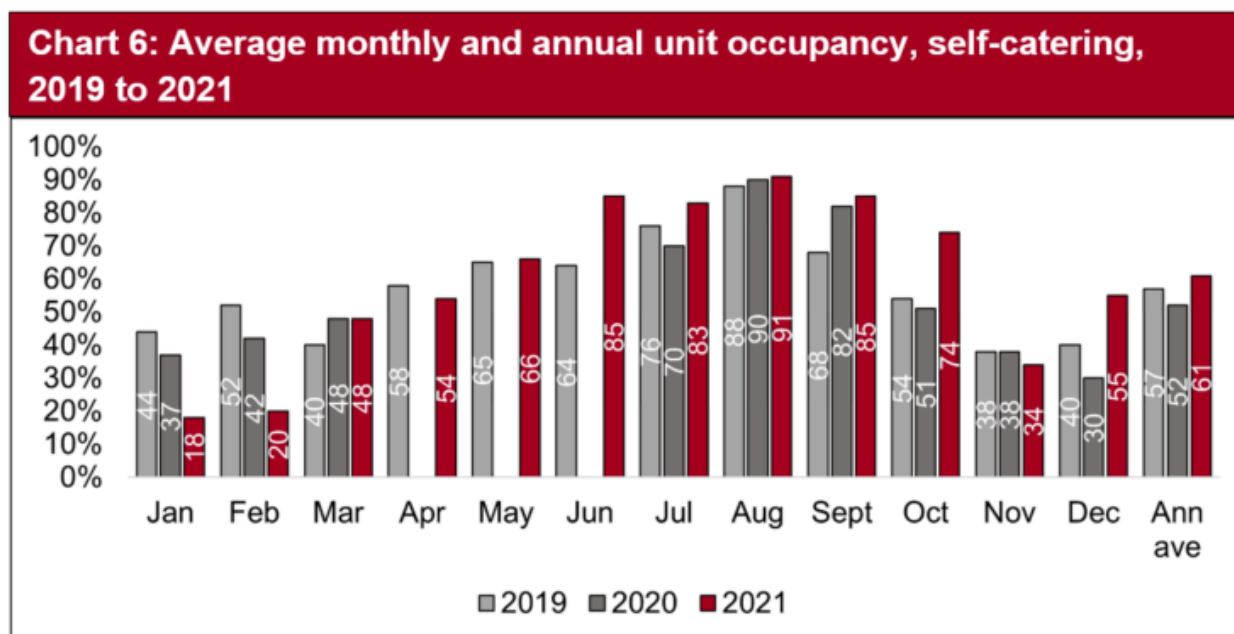
Chart 5: Quarterly room occupancy, guesthouses/B&B's, 2019 to 2021



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

Across the guesthouse/B&B sector, room occupancy in the final quarter of the year reached 44%, 21 percentage points up on the same quarter in 2020. However, it should be noted that the sample size was fairly small, and results should be treated with a degree of caution.

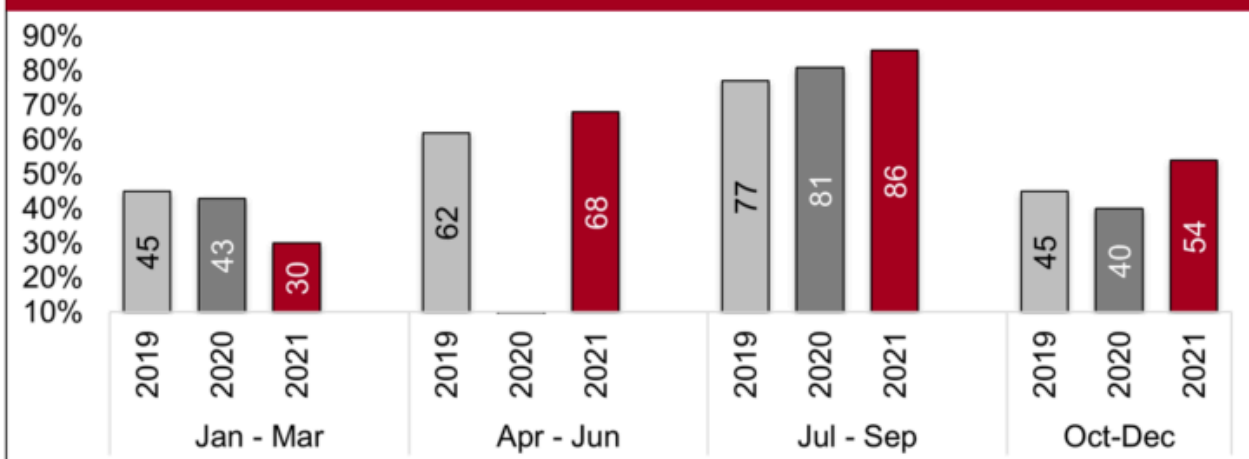
Self-catering



Across the self-catering sector, unit occupancy levels fared well during October at 74%, 23 percentage points up on the same month in 2020. November saw levels falling to 34%, slightly down on the two previous years by 4 percentage points respectively. December saw an upturn in unit occupancy with levels at 55%, 15 and 25 percentage points higher than both 2019 and 2020.

The annual average in the self-catering sector was 61%, a rise of 4 and 9 percentage points respectively on the previous two years.

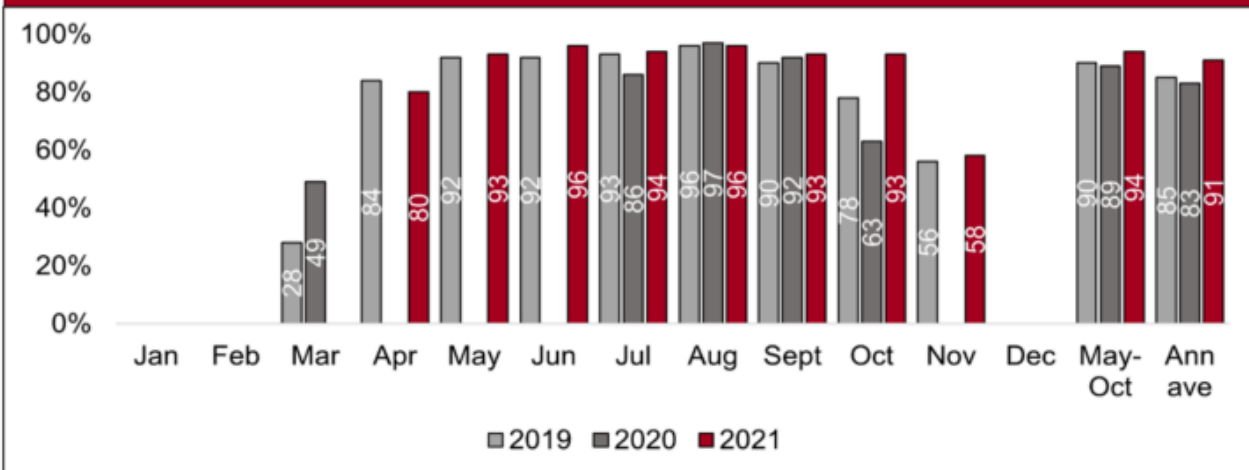
Chart 7: Quarterly unit occupancy, self-catering, 2019 to 2021



The quarterly unit occupancy for October to December was 54%, higher than in the final quarter of the year in both 2019 and 2020.

Static caravan holiday homes

Chart 8: Average monthly/seasonal/annual, static pitch occupancy, 2019 to 2021



Occupancy in the static caravans and holiday homes sector during October was 93%, on a par with the previous month of September with a noticeable increase of 15 and 30 percentage points each on both October 2019 and 2020, due in

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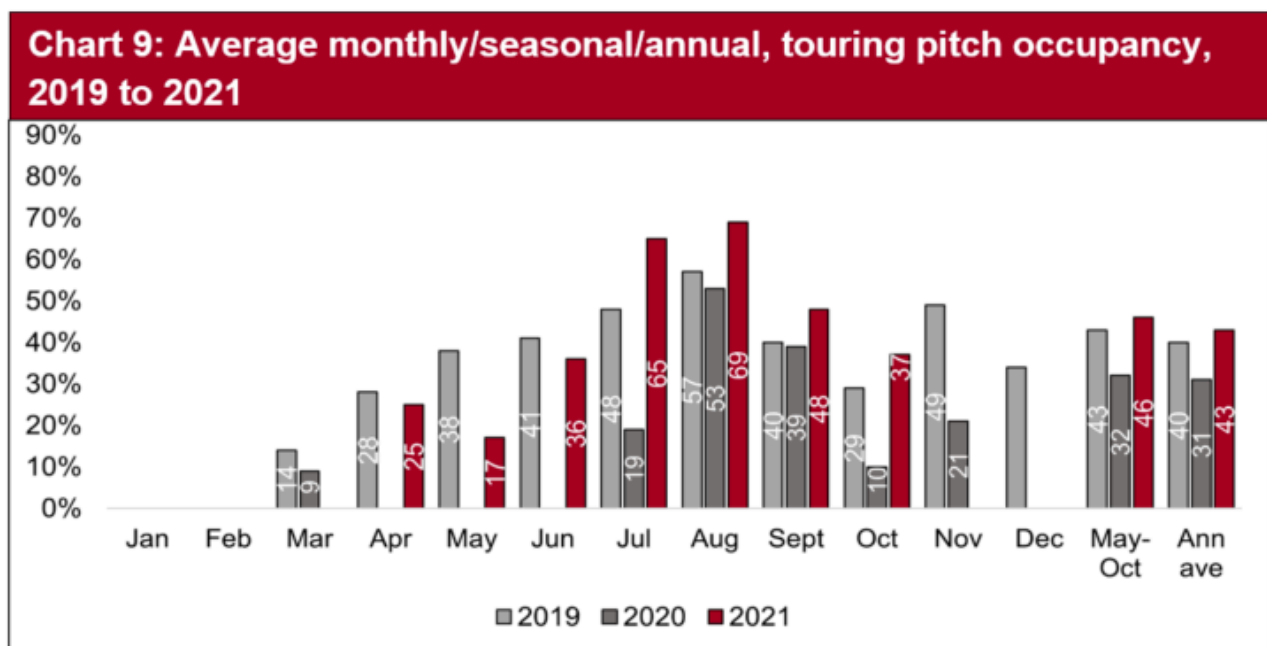
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part to a large holiday park that was closed in October 2020 but open in October 2021. This has therefore had an impact on the high occupancy levels witnessed during October 2021. November pitch occupancy at 58% was slightly above that of 2019 with data for 2020 not available. With many operators closing for the season, data for December is not available.

The 6 month May to October period saw the highest static pitch occupancy across the three years under review (94%). A similar picture was seen across the year as a whole, with the annual average in 2021 (91%), 6 and 8 percentage points higher than 2019 and 2020.

Touring caravan and camping parks



As with the static caravan and holiday parks, pitch occupancy across the touring caravan and camping parks fell month on month but pitch occupancy levels in October were still above the levels seen in 2019 and 2020 (29% and 10% each). Data for November and December is not available. The 6 month main period for the sector from May to October saw an upturn in pitch occupancy of 3 and 14 percentage points on 2019 and 2020 respectively.

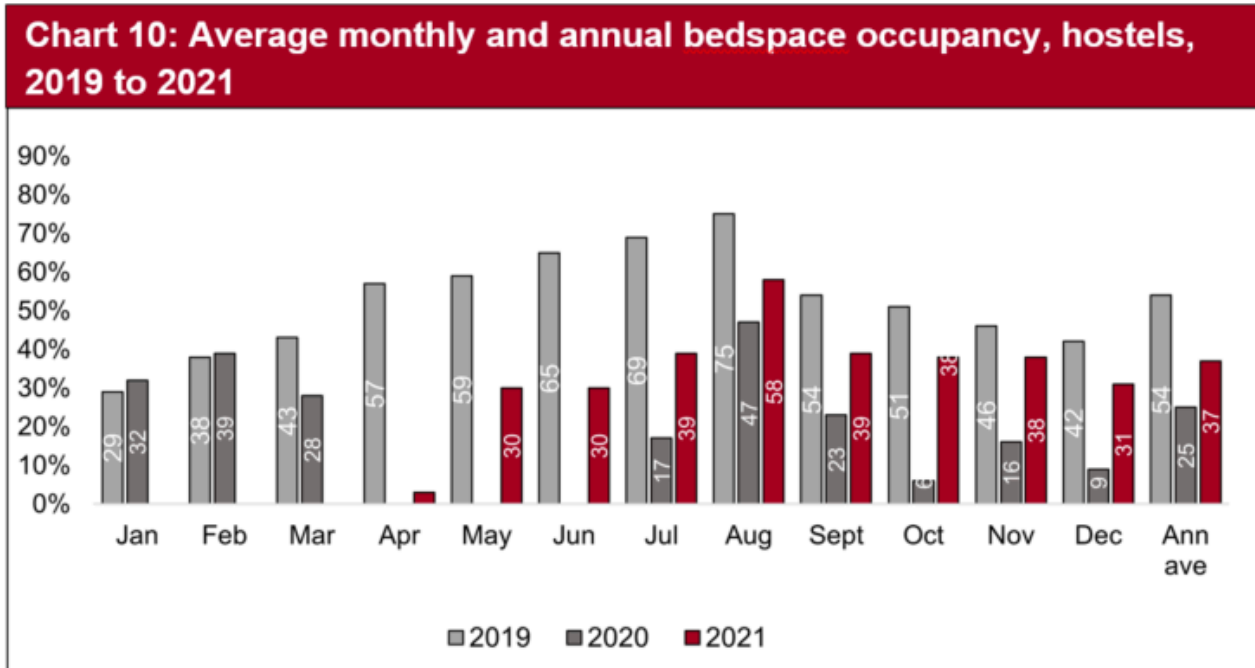
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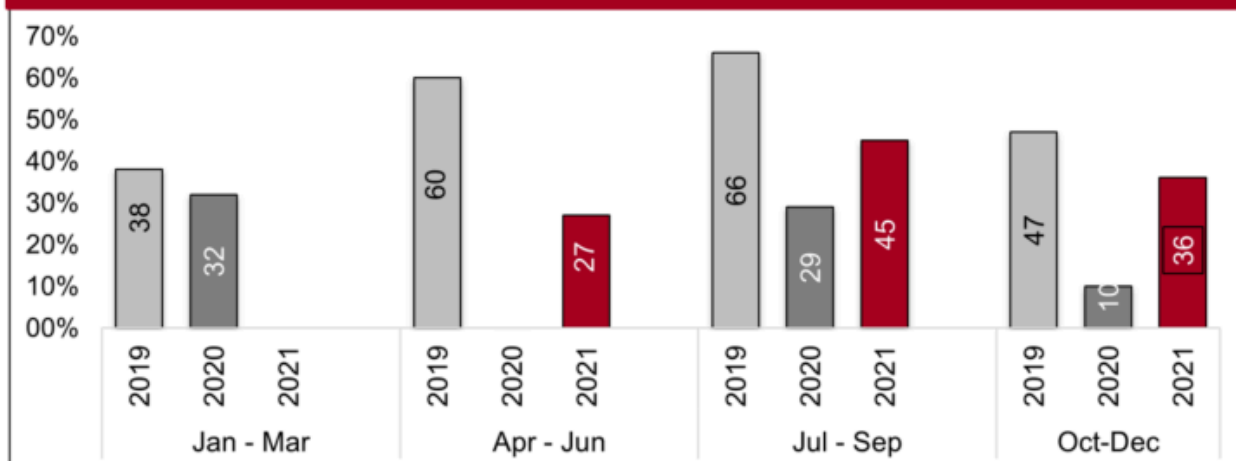
Across the year as a whole, pitch occupancy levels had risen 12 percentage points, up from 31% in 2020 to 43% this year.

Hostels



October saw bed occupancy across the hostel sector reach 38%, 32 percentage points above that recorded in the same month in 2020. November bed occupancy levels rose to 38% compared with only 16% in 2020 – however, this was still below the levels seen in November 2019 (46%). A similar pattern was seen in December with occupancy levels at 31%, significantly higher than December 2020. The annual average for the year reached 37%, still not at the 2019 level of 54% but higher than the previous year in 2020 (25%).

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



The occupancy levels for the final quarter of 2021 rose noticeably to 36%, up 26 percentage points when compared with the same period in 2020, but still not reaching the levels seen in the same quarter in 2019 (47%).

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. Outdoor hospitality was reopened, and the use outdoor amenities such as swimming pools, along with organised outdoor events for up to 30 people and wedding receptions for up to 30 people were now permitted. From 17 May, the remaining accommodation establishments, indoor hospitality, and galleries and museums were reopened. Pubs and restaurants were also permitted to serve drinks inside once again.

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Main timelines in 2020 and 2021

- 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 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 new restrictions brought in from midnight (alert level 4): non-essential retail, close contact services, gyms and leisure centres, hospitality and accommodation to close. Stay-at-home restriction. 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 Self-contained tourist accommodation without shared services 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 with pubs and restaurants allowed to serve drinks, while galleries and museums are also reopened.
- 7 August 2021 with some exceptions, such as compulsory mask wearing in certain settings, most remaining COVID-19 related restrictions are lifted in Wales.
- 26 December 2021 Wales moves to COVID Alert Level2, where restrictions on the number of people at social gatherings, and two metre social distancing return.

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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, 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 |
| July | 158 | 1 | 15 | 2 | 303 | 0 |
| August | 164 | 2 | 14 | 2 | 308 | 0 |
| September | 167 | 1 | 15 | 2 | 307 | 2 |
| October | 162 | 1 | 14 | 2 | 305 | 2 |
| November | 161 | 3 | 12 | 5 | 223 | 83 |

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| | | | | | | |
|----------|-----|---|----|---|-----|----|
| December | 158 | 4 | 11 | 7 | 251 | 55 |
|----------|-----|---|----|---|-----|----|

**Table 1: Monthly sample size by sector, 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 |
| July | 18 | 0 | 13 | 0 | 18 | 0 |
| August | 18 | 0 | 12 | 1 | 18 | 0 |
| September | 19 | 0 | 11 | 1 | 19 | 0 |
| October | 16 | 3 | 9 | 6 | 19 | 0 |
| November | 12 | 7 | 4 | 12 | 16 | 0 |
| December | 0 | 19 | 0 | 16 | 19 | 0 |

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