



# UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation  
Annual Report 2018

May 2019

the **research** solution

trs

# INTRODUCTION

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2018 which is jointly commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.

This report has been compiled by Christine King at The Research Solution.



# CONTENTS PAGE

○ Summary	4
○ UK and National Bedroom Occupancy 2014-2018	7
○ UK and National Annual Bedroom Occupancy 2014-2018	8
○ UK and National Monthly Bedroom Occupancy 2014-2018	9
○ UK and National Annual Bedroom Occupancy Averages 2014-2018	10
○ UK and National Annual Bedroom Occupancy Trends 2014-2018	11
○ UK and National Bedroom Occupancy Trends & Averages 2014-2018	12
○ UK and National Bedspace Occupancy 2014-2018	13
○ UK and National Annual Bedspace Occupancy 2014-2018	14
○ UK and National Monthly Bedspace Occupancy 2014-2018	15
○ UK and National Annual Bedspace Occupancy Averages 2014-2018	16
○ UK and National Bedspace Occupancy Trends 2014-2018	17
○ UK and National Bedspace Occupancy Trends & Averages 2014-2018	18
○ Occupancy in Detail UK & National	19
○ UK & National Annual Weekday Occupancy 2014-2018	20
○ UK & National Annual Weekend Occupancy 2014-2018	21
○ National Occupancy by Type of Establishment	22
○ UK Occupancy by Type of Establishment	23
○ Background & Methodology	24



# SUMMARY: BEDROOM OCCUPANCY

- Bedroom occupancy in the UK during 2018 was recorded at 77%. This is an increase of 4 percentage points compared to 2017. Occupancy rates in both England and Scotland increased during 2018 when compared to the previous 12 months. Room occupancy in Scotland was up 3 percentage points with England mirroring the UK overall with an increase of 4%. Welsh occupancy remained static at 61%, the same figure recorded in 2017. Northern Ireland bedroom occupancy levels were down by 2 percentage points, when compared to the previous year.
- When looking at UK bedroom occupancy levels on a monthly basis, an increase in occupancy was found in every month of the year when compared to 2017 results, except for September which remained at 83% the same as in 2017. Occupancy rates were at their highest in July with 85% occupancy recorded throughout the UK. The largest increase in occupancy rates in a single month when compared to 2017 was during January and February, where a 9% and 10% increase was recorded.
- Monthly bedroom occupancy levels in England during 2018 mirrored that of the UK, with both January and February witnessing the biggest increase during the year, up by 9 and 11 percentage points when compared to 2017. All other months during 2018 increased when comparing against 2017 results, with only September remaining static at 84%.
- Bedroom occupancy in Scotland recorded a higher occupancy rate than in 2017 in 7 months out of the year. The largest increase in monthly occupancy rates were recorded at the start of the year with March up 11% on 2017 data. Scottish occupancy rates during August were 87%, the highest recorded during 2018 across the UK.
- Across Wales, monthly occupancy increased in 4 months during 2018 when compared to the previous year. The largest monthly increase was in December with levels at 53%, an increase of 6 percentage points when compared to 2017 data. The highest monthly occupancy rate in Wales throughout 2018 was during August, where occupancy levels were recorded at 74%.
- Northern Ireland monthly occupancy rates were lower in 9 out of the 12 months during 2018, with only February, March and May increasing in room occupancy. The biggest increase when compared to the previous year was in February where levels increased by 6%. The highest occupancy rate recorded in Northern Ireland was 73%, recorded in both June and August.

# SUMMARY: BEDSPACE OCCUPANCY

- Bedspace occupancy in the UK increased by 3 percentage points, up to 55% in 2018, when compared to the previous year. Occupancy rates in England had also increased by 3% when compared to 2017. Both Wales (47%) and Northern Ireland (46%) witnessed a slight drop in bed occupancy levels by 1% and 2% respectively, with Scotland (52%) remaining static.
- Monthly data analysis shows that bedspace occupancy in the UK increased in 9 months of the year when compared to the previous 12 months. Bed occupancy rates were at their highest in August during 2018, peaking at 63% which is an increase of 2% on 2017. The largest increase during a single month was recorded in both February and March by 6% respectively.
- Looking at England bed occupancy rates on a month by month basis, levels had increased in 10 months during the year when compared to 2017. August recorded the highest bed occupancy rate during the year, at 62%. The largest increase in a month was during February, with occupancy rates 7% up on the same period in 2017.
- Although overall bed occupancy remained static in Scotland during 2018, only 4 months out of the year saw an increase when compared with the previous year. The highest bedspace occupancy figure recorded in the UK during 2018 was in Scotland (72%) in the month of August. March witnessed the largest increase during a single month up 15% against the same period last year.
- Bedspace occupancy levels in Wales increased in 4 out of 12 months during 2018. During the month of August occupancy rates peaked in Wales, at 61% remaining in line with 2017 results. The largest increase in bed occupancy was during December when levels were 4% higher than in December 2017.
- Northern Ireland bedspace occupancy levels were only higher during February and March when compared with 2017. Bedspace occupancy levels in August were recorded at 61%, the highest occupancy rate in a single month in Northern Ireland during this year. During February a 3% increase was the largest recorded in a single month when compared against 2017 results.

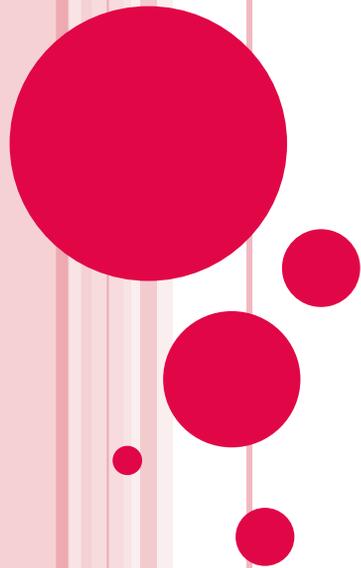


# SUMMARY: ROOM AND BEDSPACE OCCUPANCY IN DETAIL

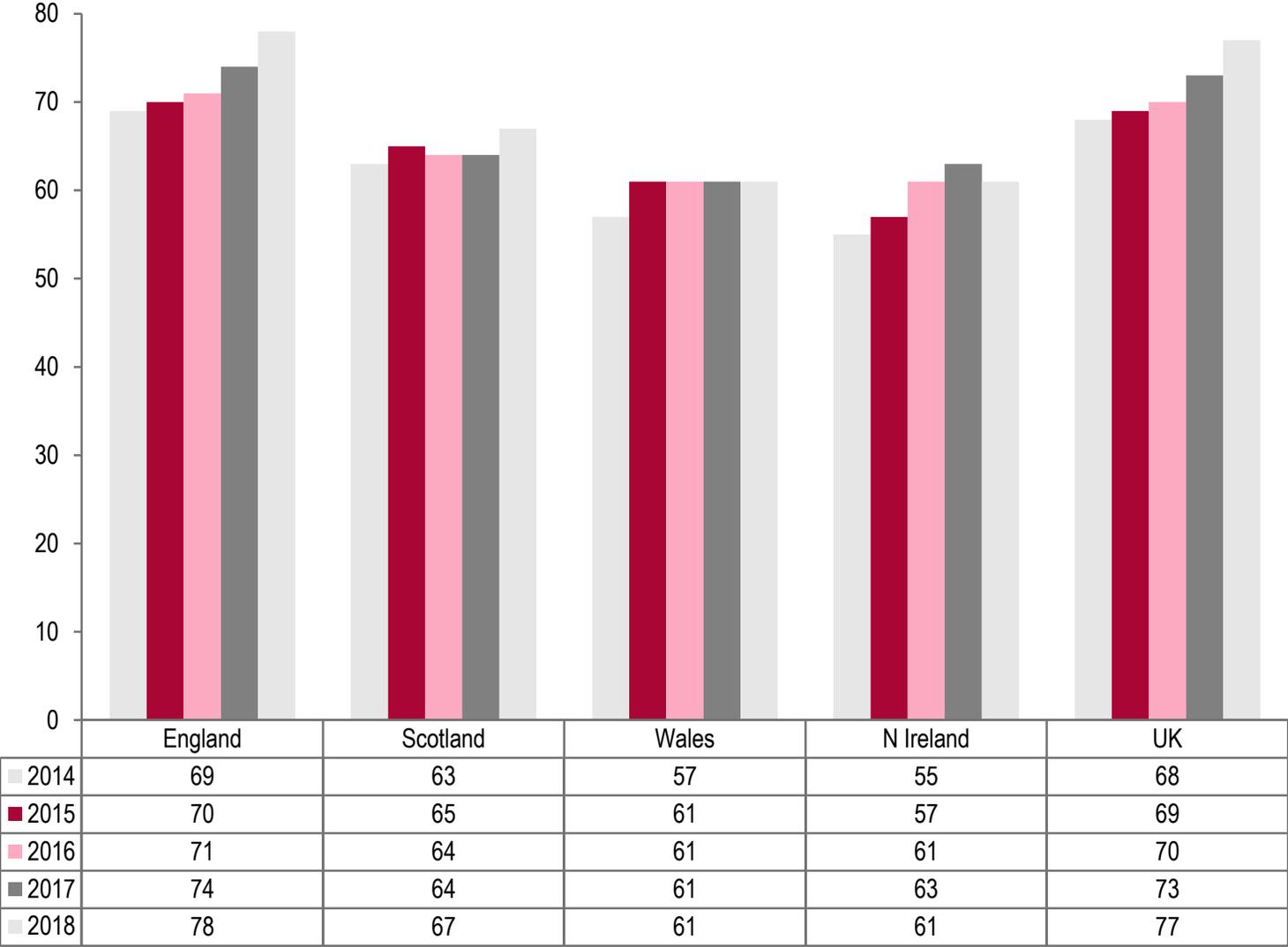
- Annual weekday room occupancy levels in the UK increased during 2018, when compared to 2017. Room occupancy was up 4% from 72% in 2017 to 76% this year, whilst bedspace occupancy remained static at 49%. Weekday occupancy levels in England also increased during 2018 when compared to the previous year, up 3% to 77%, with bedspace levels increasing slightly, up by a single percentage point to 50%. Scotland witnessed an increase in both room and bedspace occupancy during the weekday in 2018, increasing 4% in room occupancy up to 68% and by 2% in bedspace occupancy with levels up to 49%. Occupancy levels during weekday in Wales had remained static when compared to 2017, room remaining at 59% with bedspace flat at 42%. Northern Ireland witnessed a downturn of 2% in both measures of occupancy, room occupancy was recorded at 58% with bedspace at 40%.
- Room occupancy levels in the UK during the weekend in 2018 had increased by 6 percentage points to 79%, whilst bedspace occupancy had also increased by 5 percentage points, with levels at 66% for 2018. Both room and bedspace occupancy levels in England had increased by 7% when compared to 2017. Weekend room occupancy was recorded at 81% with bedspace at 68% during 2018. Scotland saw a 3% increase in room occupancy on 2017 data, with levels up to 67% during 2018, bedspace occupancy had increased by a single percentage point up to 56%. Northern Ireland witnessed a downturn in room and bedspace occupancy rates during the weekend in 2018, by 2 and 3 percentage points respectively. Wales bedspace occupancy levels remained static at 53% during the weekend in 2018, with room occupancy falling by a single percentage point to 61%.
- Both room and bedspace occupancy by location type increased across all locations when compared to 2017 data. Seaside locations witnessed an increase of 6 percentage points in room occupancy, up from 68% to 74%. Both small town and country/village locations saw a 2% and 3% increase in room occupancy respectively. City/large town locations witnessed the smallest increase when compared to 2017, with a single percentage point increase found.



# BEDROOM OCCUPANCY: UK AND NATIONAL



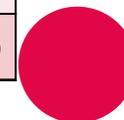
# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY 2014 - 2018



# UK AND NATIONAL: MONTHLY BEDROOM OCCUPANCY 2014 - 2018

**Table 1: UK and National: Bedroom Occupancy 2014 - 2018**

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18
January	52	54	55	56	65	41	57	45	42	51	39	41	43	43	47	39	40	33	48	46	50	53	54	54	63
February	61	63	64	63	74	51	53	53	42	51	48	52	51	53	51	48	55	51	48	54	59	61	63	61	71
March	64	63	65	66	75	53	54	55	51	62	50	55	55	55	53	45	54	53	54	58	61	61	64	64	73
April	68	68	70	70	77	60	61	60	62	60	58	59	58	64	59	55	58	59	62	59	66	66	69	69	75
May	72	72	72	73	79	70	72	69	74	77	64	66	61	65	66	62	65	66	68	69	71	72	71	73	78
June	76	78	77	80	82	75	76	76	79	81	65	70	67	69	71	65	68	72	74	73	75	77	77	80	82
July	79	80	81	84	86	78	78	79	82	82	69	75	73	74	71	64	64	76	72	69	78	79	81	83	85
August	79	78	79	81	83	82	79	83	87	87	76	75	77	75	74	73	71	79	79	73	79	78	79	81	83
September	79	80	81	84	84	78	77	78	80	80	69	74	72	71	68	64	63	72	74	69	78	79	80	83	83
October	74	75	75	80	83	65	65	67	66	68	61	66	63	63	57	55	54	62	64	62	72	73	74	78	81
November	68	67	70	78	79	56	53	56	53	55	45	54	55	57	56	52	46	57	57	52	65	64	68	75	76
December	61	60	63	71	72	48	49	48	48	48	39	48	51	47	53	41	42	51	51	48	58	57	61	68	69



# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY AVERAGES 2014 - 2018

**Table 1a: UK and National: Bedroom Occupancy Averages 2014 - 2018**

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18
April–Oct Average	75	76	76	79	82	73	73	73	76	76	66	69	67	69	67	63	63	69	70	68	74	75	76	78	81
July–Sept Average	79	79	80	83	84	79	78	80	83	83	71	75	74	73	71	67	66	76	75	70	78	79	80	83	84
Annual Average	69	70	71	74	78	63	65	64	64	67	57	61	61	61	61	55	57	61	63	61	68	69	70	73	77



# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS

## 2014 - 2018

**Table 2: UK and National: Bedroom Occupancy Trends 2014 - 2018**

	England			Scotland			Wales			Northern Ireland			UK		
	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18
January	54	55	59	48	48	46	41	42	44	37	40	43	52	54	57
February	63	63	67	52	49	49	50	52	52	51	51	51	61	61	65
March	64	65	69	54	53	56	53	55	54	51	54	55	62	63	67
April	69	69	72	60	61	61	58	60	60	58	60	60	67	68	71
May	72	72	75	70	72	73	64	64	64	64	66	67	71	72	74
June	77	78	80	76	77	79	67	69	69	68	71	73	76	78	79
July	80	82	84	78	80	81	72	74	73	68	71	72	79	81	83
August	79	79	81	81	83	85	76	76	75	74	76	77	79	79	81
September	80	82	83	78	78	80	72	72	70	66	70	72	79	81	82
October	75	77	79	66	66	67	63	64	61	57	60	63	73	75	78
November	68	72	76	55	54	55	51	55	56	52	53	55	66	69	73
December	61	65	69	48	48	48	46	49	50	45	48	50	59	62	66



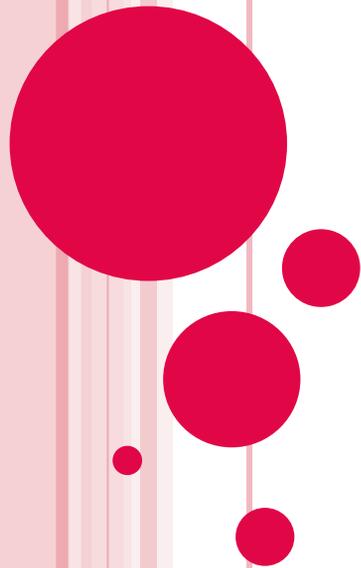
# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS - AVERAGES 2014 - 2018

**Table 2a: UK and National: Bedroom Occupancy Trends 2014 - 2018**

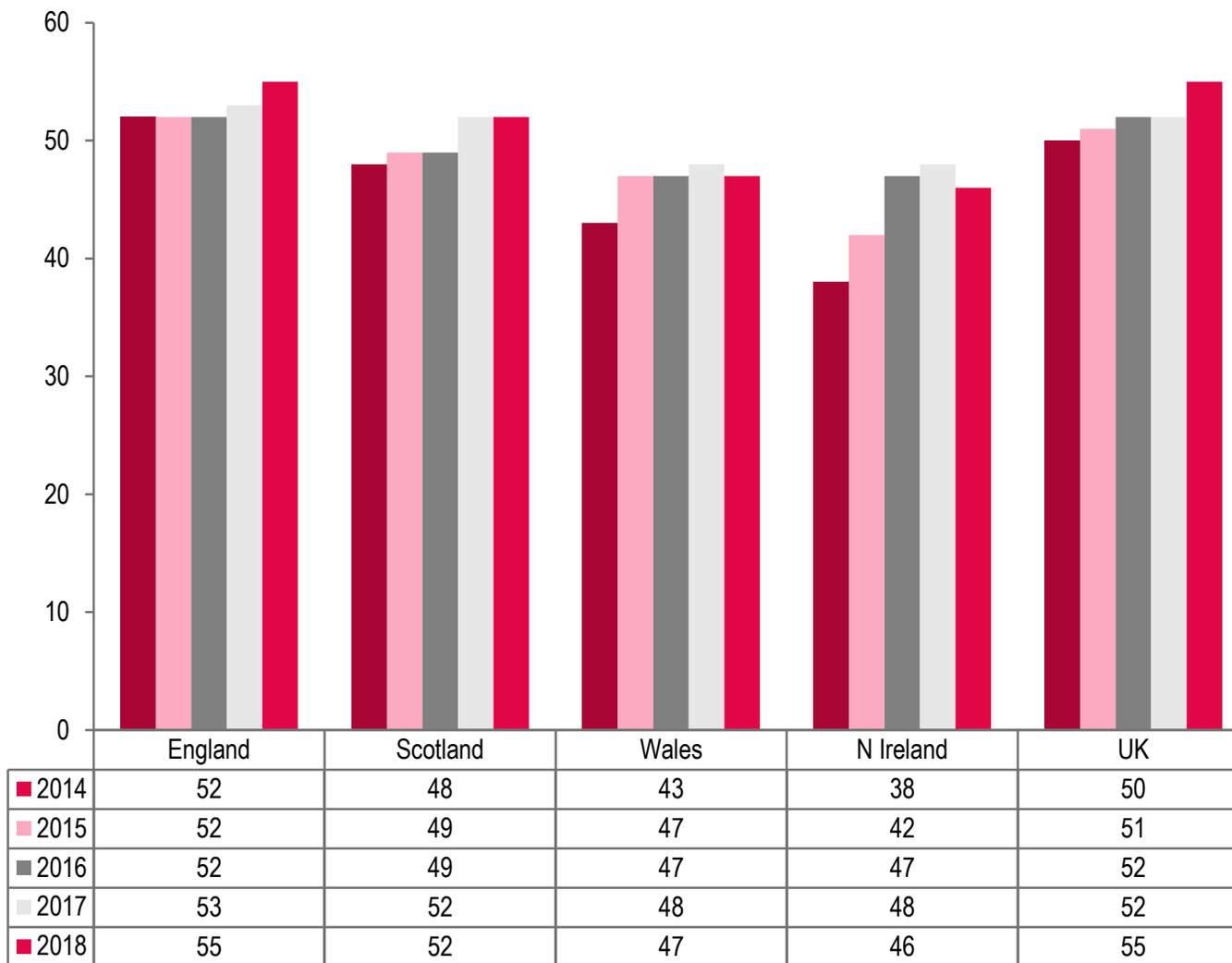
	England			Scotland			Wales			Northern Ireland			UK		
	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18
April–Oct Average	76	77	79	73	74	75	68	69	68	65	68	69	75	76	78
July–Sept Average	80	81	83	79	78	80	73	74	73	70	72	74	79	81	82
Annual Average	70	72	74	64	71	70	60	61	61	58	60	62	69	71	73



# **BEDSPACE OCCUPANCY: UK AND NATIONAL**



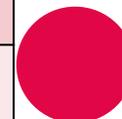
# UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY 2014 - 2018



# UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY 2014 - 2018

Tab55le 3: UK and National: Bedspace Occupancy 2014 - 2018

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18
January	36	39	38	39	45	29	40	30	42	40	26	30	32	32	34	23	27	24	35	32	34	38	37	39	44
February	44	46	46	45	52	36	36	37	31	40	33	39	39	40	39	29	38	39	35	38	42	44	45	44	50
March	48	47	47	47	53	38	38	40	34	49	35	41	41	41	40	31	39	40	40	42	46	45	46	46	52
April	53	50	51	53	55	46	47	44	52	45	44	46	46	52	46	36	43	46	49	42	51	49	50	53	54
May	54	55	53	54	57	54	57	54	57	61	49	52	47	50	51	42	49	51	51	51	53	55	53	54	57
June	55	56	56	56	58	58	59	60	65	63	49	53	51	53	55	45	50	52	56	55	55	56	56	57	58
July	60	60	61	60	60	63	63	66	71	68	55	58	58	59	56	40	51	63	60	55	60	60	61	61	60
August	63	62	61	60	62	68	66	69	73	72	62	62	63	61	61	55	57	65	65	61	64	63	62	61	63
September	58	58	59	57	58	59	59	60	64	63	52	55	56	55	53	45	45	54	56	50	58	58	59	58	58
October	54	54	54	56	58	49	48	51	52	50	45	50	48	48	43	39	41	47	48	42	52	53	53	55	57
November	48	47	49	53	55	39	37	39	37	38	34	39	40	42	41	36	33	44	40	38	46	45	48	51	53
December	45	44	47	52	52	35	35	37	40	36	30	36	40	37	41	30	33	39	40	39	43	42	46	50	50



# UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY

## TRENDS - AVERAGES

### 2014 - 2018

**Table 3a: UK and National: Average Bedspace Occupancy 2014 - 2018**

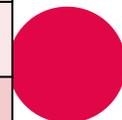
	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18	14	15	16	17	18
April–Oct Average	57	56	56	57	58	57	57	58	62	60	51	54	53	54	52	43	48	54	55	51	56	56	56	57	58
July–Sept Average	60	60	60	59	60	63	63	65	69	68	56	58	59	58	57	47	51	61	60	56	60	60	61	60	61
Annual Average	52	52	52	53	55	48	49	49	52	52	43	47	47	48	47	38	42	47	48	46	50	51	52	52	55



# UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY TRENDS 2014 - 2018

**Table 4: UK and National: Bedspace Occupancy Trends 2014 - 2018**

	England			Scotland			Wales			Northern Ireland			UK		
	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18
January	38	39	41	33	37	37	29	31	33	25	29	30	37	38	40
February	45	46	48	36	35	36	37	39	39	35	38	37	44	44	46
March	47	47	49	39	37	41	39	41	41	37	39	41	46	46	48
April	51	51	53	46	48	47	45	48	48	42	46	46	50	51	52
May	54	54	55	55	56	57	49	50	49	47	50	51	54	54	55
June	56	56	57	59	61	63	51	52	53	49	53	55	56	56	57
July	60	60	60	64	67	68	57	58	58	52	58	59	60	61	61
August	62	61	61	68	69	71	62	62	62	59	62	64	63	62	62
September	58	58	58	59	61	62	54	55	55	48	52	53	58	48	58
October	54	55	56	49	50	51	48	49	46	42	46	46	53	54	55
November	48	50	52	38	38	38	38	40	41	38	39	41	46	48	51
December	45	48	50	36	37	38	35	38	39	34	37	40	44	46	49



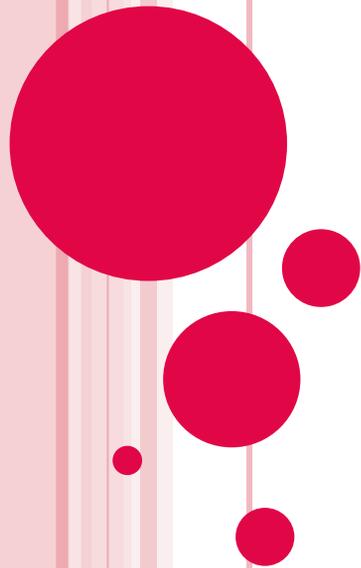
# UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY TRENDS - AVERAGES 2014 - 2018

**Table 4: UK and National: Bedspace Occupancy Trends 2014 - 2018**

	England			Scotland			Wales			Northern Ireland			UK		
	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18	14-16	15-17	16-18
April–Oct Average	57	56	57	57	59	60	52	53	53	49	52	53	56	57	57
July–Sept Average	60	60	60	64	66	67	58	59	58	53	57	59	60	60	60
Annual Average	52	52	53	49	50	51	46	47	47	42	46	47	51	52	53



# OCCUPANCY IN DETAIL: UK AND NATIONAL



# UK AND NATIONAL ANNUAL WEEKDAY OCCUPANCY 2014 - 2018

Fig. 3: UK and National: Annual Weekday  
Bedroom Occupancy 2014 – 2018

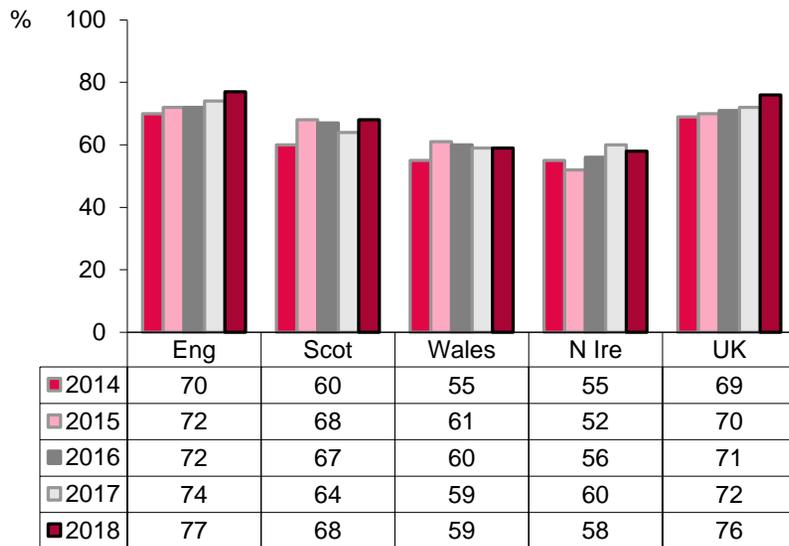
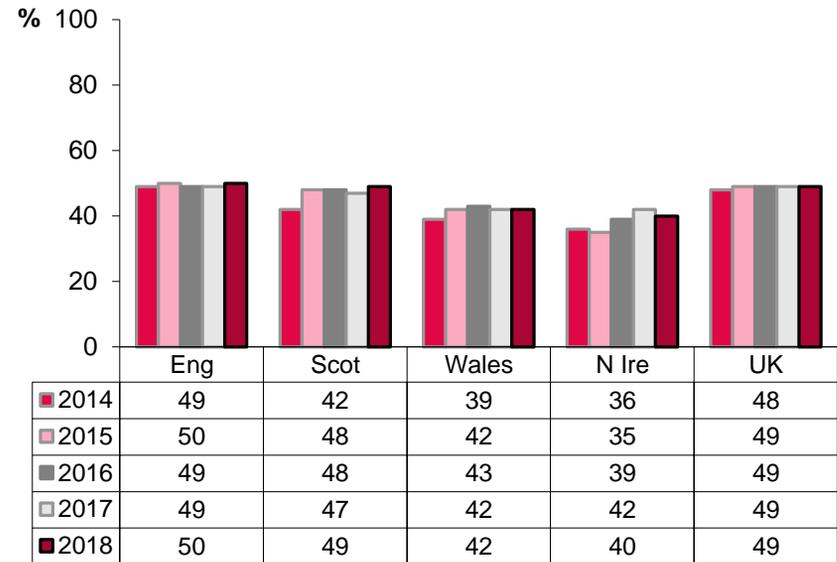


Fig. 4: UK and National: Annual Weekday  
Bedspace Occupancy 2014 - 2018



# UK AND NATIONAL ANNUAL WEEKEND OCCUPANCY 2014 - 2018

Fig. 5 UK and National: Annual Weekend Bedroom Occupancy 2014 – 2018

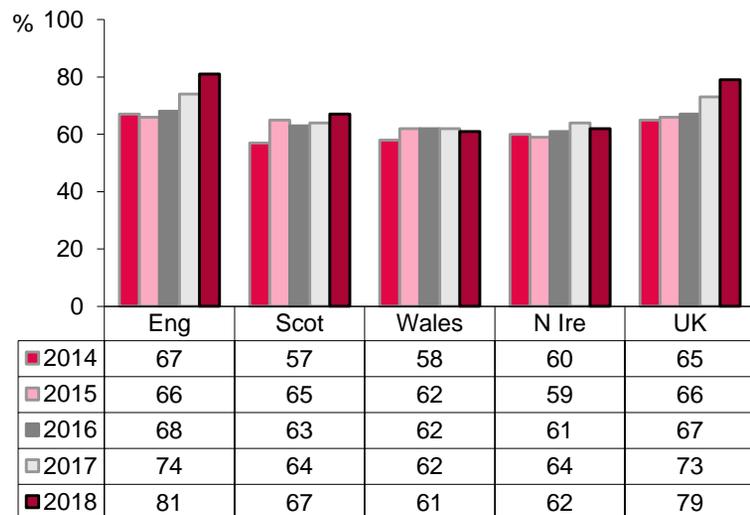
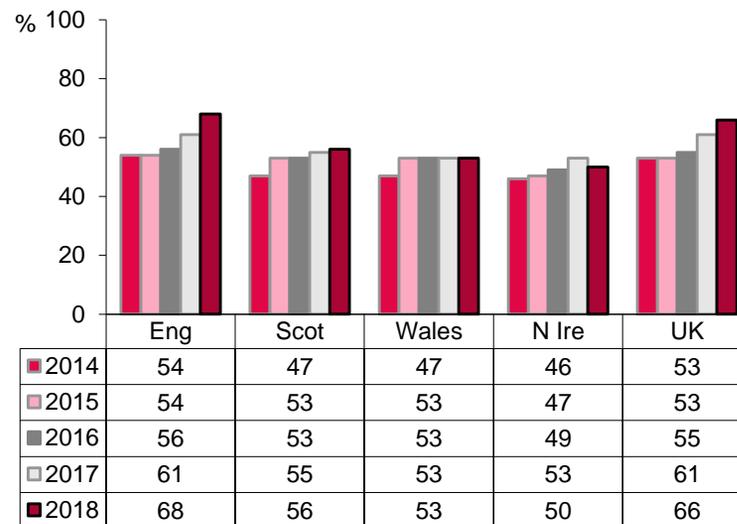


Fig. 6: UK and National: Annual Weekend Bedspace Occupancy 2014 – 2018



# NATIONAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 11: National: Annual Bedroom Occupancy 2017 and 2018 by Type of Establishment

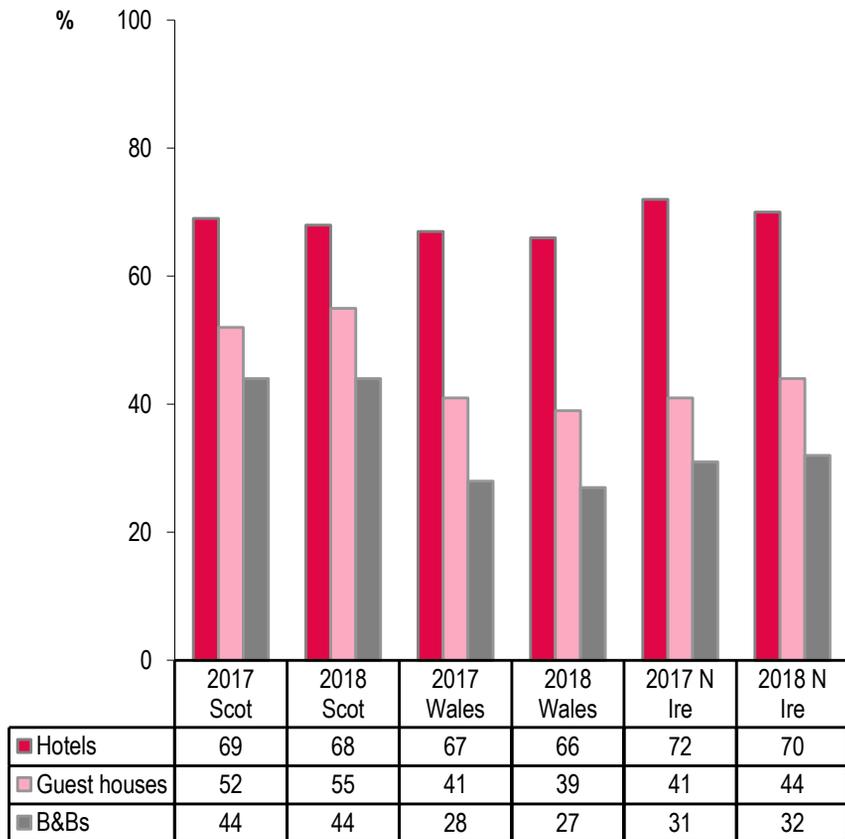
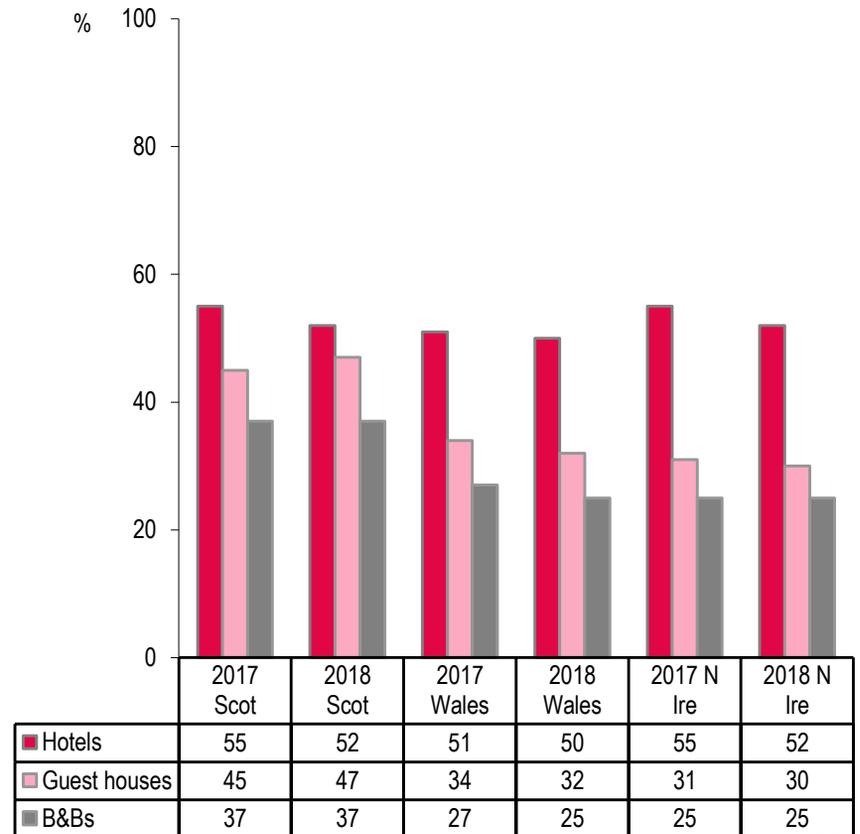


Fig. 12: National: Annual Bedspace Occupancy 2017 and 2018 by Type of Establishment

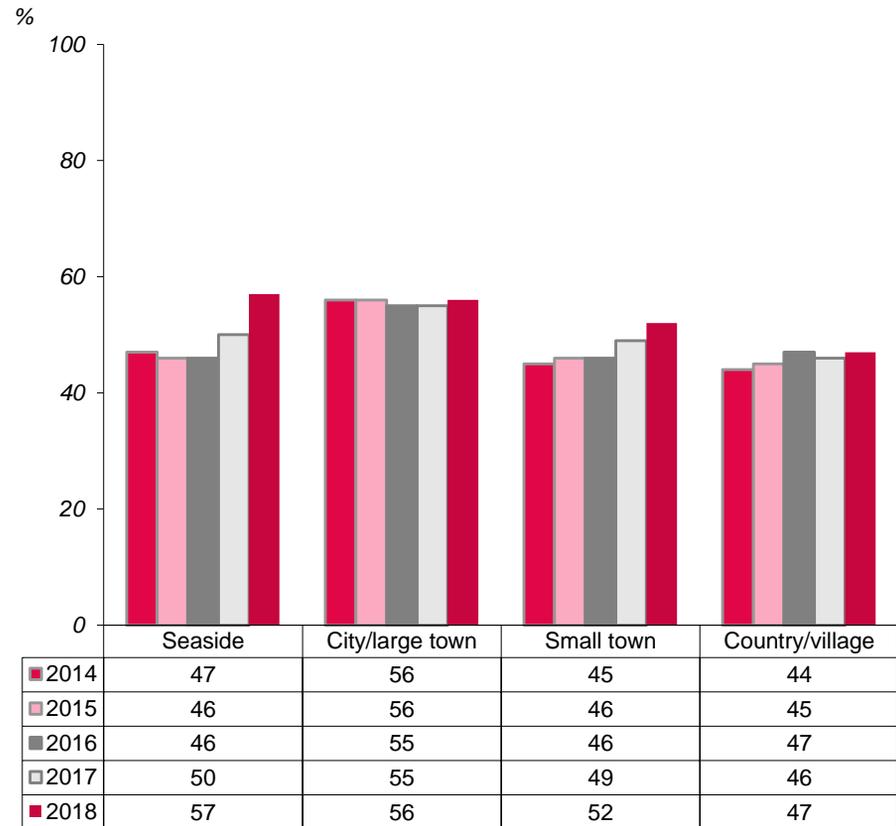
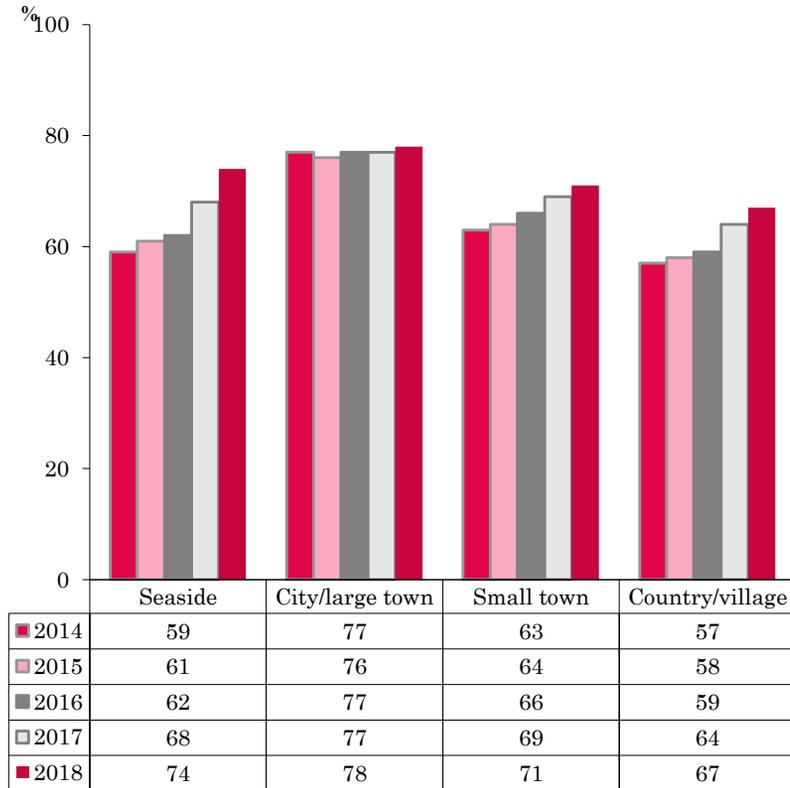


Due to a change in the methodology and collection of data for England from June onwards, comparable figures for England cannot be shown.

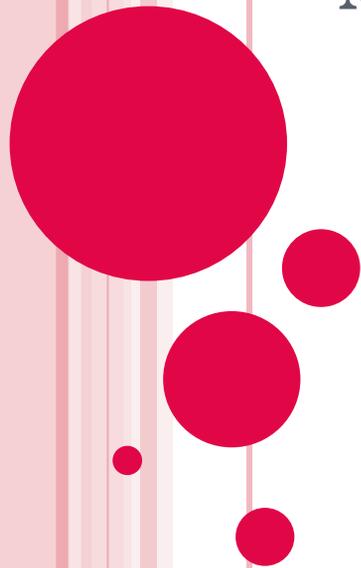
# UK OCCUPANCY BY LOCATION OF ESTABLISHMENT

Fig. 13: UK: Annual Bedroom Occupancy 2014 - 2018 by Location of Establishment

Fig. 14: UK: Annual Bedspace Occupancy 2014 - 2018 by Location of Establishment



# BACKGROUND AND METHODOLOGY



## BACKGROUND TO THE SURVEY

As part of the EU Directive on Tourism Statistics adopted in January 1995, the UK is required to submit monthly occupancy rates for hotels and similar establishments (i.e. serviced accommodation) to Eurostat, the statistical office of the European Community. The responsibility for providing this data lies with the National Tourist Boards for England, Scotland and Northern Ireland and with Visit Wales (part of the Welsh Assembly Government), each of whom is responsible for the implementation of an occupancy survey in their area, carried out according to a common specification and standard, thus ensuring the production of comparable occupancy data for the whole of the UK.

The types of accommodation included in the survey are defined as *tourist accommodation which is arranged in rooms and where bed-making and cleaning services are provided*. This includes:

*Hotels, motels, inns, guest houses, farm guest houses, bed and breakfast establishments*

The types specifically excluded are:

*Youth hostels and University accommodation*

This summary has been compiled by The Research Solution (UK Survey Co-ordinator) from figures supplied by (or on behalf of) the National Tourist Boards of England, Northern Ireland (working with NISRA (the Northern Ireland Statistics and Research Agency), Scotland and Visit Wales (part of the Welsh Government).

Further information about the surveys in individual areas June be obtained from the relevant organisations:

VisitEngland (020 7578 1400)

Northern Ireland Tourist Board (02890 231 221)

VisitScotland (0131-472-2222)

Visit Wales (029 2047 9909)



## BACKGROUND TO THE SURVEY (CONT'D)

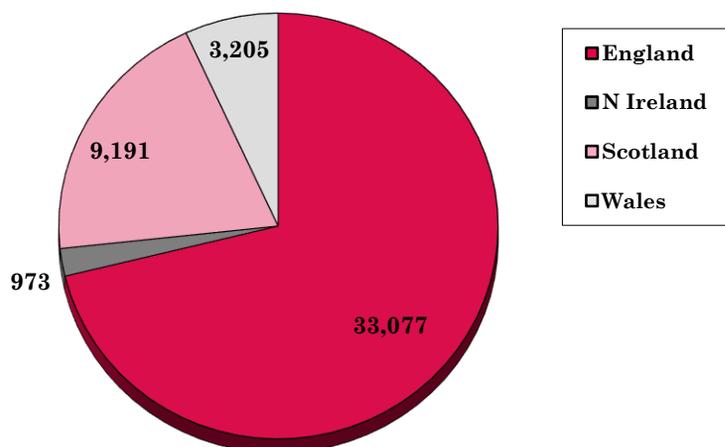
- This document summarises the main trends from the surveys carried out in England, Scotland, Wales and Northern Ireland which have been aggregated to provide occupancy figures for the UK as a whole.
- The individual surveys are conducted according to a common specification to ensure the production of comparable data for the whole of the UK.
- The survey includes hotels (including motels, lodges and inns), guesthouses and private houses offering bed and breakfast to tourists (including farmhouses). It should be noted that only in Northern Ireland, where compulsory registration of tourist accommodation ensures an accurate stock record, is there a definition of the various types of accommodation. In England, Scotland and Wales the type is defined by each accommodation establishment itself in answering a questionnaire and therefore, because the criteria are not objectively defined, the distinction between types is not always clear and may vary slightly.

In 2018 there were about 46,000 establishments of this type in the UK which were known to the tourist boards, with a total of almost 2 million bedspaces available daily.

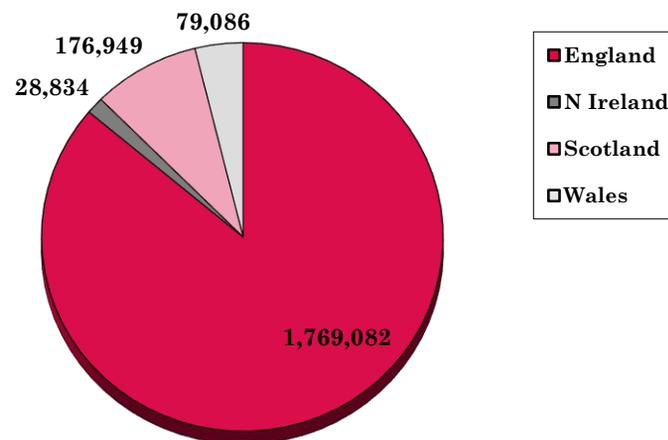


## METHODOLOGICAL DETAILS

**Figure 15: Distribution of total known accommodation stock 2018: Number of establishments**



**Figure 16: Distribution of total known accommodation stock 2018: Number of bedspaces**



- Each month between 2,235 and 3,625 returned data and the occupancy rates in the report are calculated from these monthly samples. *The sample size for England increased from June 2017 onwards with a change in methodology and the inclusion of additional STR data.*
- The occupancy figures in this summary are calculated on the accommodation available each month - i.e. only open accommodation is included. In calculating figures for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area that month.



## METHODOLOGICAL DETAILS (CONT'D)

1. The figures in this summary are based on data available within eight weeks of the end of the month. In some cases the boards will re-run the monthly analysis later in the year to include data which was received too late for inclusion in this summary. These later figures will be used in the 2016 Annual Summary.
2. The minimum target sample size for Northern Ireland, Scotland and Wales is 200 open establishments per month while in England the target minimum sample size is 750. Larger sample sizes may be used in some areas in order to enable Boards to undertake further analysis based on geographical sub-divisions of the data.
3. In the calculation of occupancy rates for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area.
4. **Occupancy rates:**

Bedspace occupancy	Percentage of available bedspaces which were occupied
Room occupancy	Percentage of available rooms which were occupied
Non-UK bedspace occupancy	Percentage of available bedspaces which were occupied by non-UK guests
Percentage of non-UK guests	Percentage of arrivals which were non-UK guests
Percentage of non-UK bednights	Percentage of occupied bedspaces which were occupied by non-UK guests
5. It should be noted that:
  - (a) the figures in Tables 2, 4, 8 and 9 will be based on a subset of the sample for all guests. This is because separate UK and non-UK data is not known for all establishments in the sample (Tables 2, 4 and 5), not all establishments provide daily data (Tables 4 and 5) and not all establishments give tariff details (Tables 9 and 10); and
  - (b) because of changes in the data collected, it is no longer possible to provide UK/non UK figures for Scotland or figures relating to arrivals for Wales (Tables 2 and 5).
  - (c) from June 2010, English occupancy data includes additional occupancy information for the 100+ room hotel sector supplied by STR Global. Given the change in the structure of the sample, care should be taken in the interpretation of year-on-year changes.
6. Accuracy of the results: The statistical accuracy of the results depends upon the size of the sample, the variation in occupancy rates between establishments and (to a smaller extent) the size of the survey population. As the sample is self-selecting, it is not possible to calculate true statistical margins of error. However, it is likely that the results are accurate to between  $\pm 5.9\%$  (sample of 50) to  $\pm 1.6\%$  (sample of 650). As there continues to be a substantial core of survey participants providing data every month, the trends which are identified by the survey are believed to reflect accurately overall trends in the use of serviced accommodation.
7. \* Methodological note: From June 2017, the England Occupancy estimates are collected using a different methodology. Using this data makes the survey more robust but has caused a break in trends for England and the UK. From June 2017, the new methodology is based on the STR occupancy estimates which are continuously collected whereas prior to June 2017 the England Occupancy estimates were collected through a bespoke panel. This methodological change has affected trends. Meaningful comparison between estimates collected from June 2017 onwards and estimates collected prior to June 2017 can not be conducted for England and the UK. Data for Scotland, Wales and Northern Ireland remains unaffected by the change.