

# United Kingdom Occupancy Survey

Serviced Accommodation

Annual Report 2019

On behalf of VisitEngland, Visit Scotland, Visit Wales and NISRA (Northern Ireland Statistics and Research Agency)

# Introduction

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation in 2019 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 Digital, Culture, Media and Sport.

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

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# Summary: Bedroom Occupancy

During 2019, bedroom occupancy across the UK was recorded at 76%, a decrease of 1 percentage point when compared with the previous year. There was very little change in bedroom occupancy rates across England and Scotland, with both nations remaining on a par with occupancy levels in 2018 (78% and 67% respectively). Wales mirrored the UK with a small decrease in bed occupancy during 2019, down from 61% to 60% but generally bedroom occupancy levels across Wales have been fairly static across the five years under review. Northern Ireland bedroom occupancy fell to its lowest levels since 2015, down by 2 percentage points when compared to the previous year.

When looking at UK bedroom occupancy levels on a monthly basis, January, March, Apr, May and November remained static when compared with 2019. Small decreases of 1 percentage point each were seen in February, July, August, September, October and December. The month of June fell by two percentage points, from 82% in 2018 to 80% in 2019. Occupancy rates were at their highest in July with 84% occupancy recorded throughout the UK. August and September both recorded bedroom occupancy levels of 82% respectively.

Monthly bedroom occupancy levels in England during 2019 mirrored that of the UK, with seven of the months showing a small decline of 1 percentage point and three months remaining static. Although June recorded a bedroom occupancy of 80%, this was down by 2 percentage points when compared with the same month the previous year. As with the UK as a whole, July saw the highest room occupancy (85%) across the 12 months in 2019.

Bedroom occupancy in Scotland recorded a higher occupancy rate in 6 out of the 12 months across the year when compared to 2018. The largest increase in monthly occupancy rates was at the end of the year with December up 3 percentage points on 2018 data. Scottish occupancy rates during August were 85%, the highest recorded during 2019.

# Summary: Bedroom Occupancy

Across Wales, monthly occupancy increased in 5 out of the 12 months during 2019 when compared to the previous year. The largest monthly increase was in October with levels at 61%, an increase of 4 percentage points when compared to the corresponding month in 2018. The highest monthly occupancy rate in Wales throughout 2019 was during August, where occupancy levels were recorded at 75%, a 1 percentage point increase on August 2018. March, November and December all saw a downturn in occupancy rates, falling by 3% respectively.

In Northern Ireland, monthly occupancy rates were lower in 9 out of the 12 months during 2019, with the start of the year in January witnessing the biggest increase, up by 4 percentage points. Both July and August saw an upturn in room occupancy levels by 3 and 2 percentage points each. The highest occupancy rate recorded in Northern Ireland was 75%, recorded in August of this year.

# Summary: Bedspace Occupancy

Bedspace occupancy in the UK remained on a par with 2018 figures at 55%. Occupancy rates in England mirrored that of the UK, with both Scotland (51%) and Wales (46%) witnessing a slight drop in bed occupancy levels by 1 percentage point respectively. Northern Ireland saw the biggest drop in bedspace occupancy in 2019, down by 3 percentage points on the previous year.

Monthly data analysis shows that bedspace occupancy in the UK increased in just 2 months of the year when compared to the previous 12 months. The months of February, May, June, July, August, October, November and December all maintained the exact same levels of bedspace occupancy as in 2018. As in the previous year, bed occupancy rates were at their highest in August, peaking at 63%.

England bed occupancy rates on a month by month basis saw levels increasing in only 2 months during the year when compared to 2018 with April and August increasing slightly by 1 percentage point respectively. August recorded the highest bed occupancy rate during the year, at 63%. Across England in general, there was very little month on month change when compared with bed occupancy levels in 2018.

Overall, bed occupancy remained flat in Scotland during 2019, with 4 months of the year seeing an increase when compared with the previous year. The highest bedspace occupancy figure recorded in the UK during 2019 was in Scotland (70%) in the month of August, (although this had decreased by 2 percentage points when compared to August 2018). October witnessed the largest increase during a single month up 8 percentage points against the same period last year. January and February saw the biggest decline in bed occupancy levels, down by 12 and 10 percentage points each.

# Summary: Bedspace Occupancy

Only the months of October and November saw bedspace occupancy levels in Wales increase across all 12 months during 2019. During the month of August occupancy rates peaked at 60% in Wales, remaining flat when compared with the same month the previous year. The months of April, May, July and September all remained static when compared with bed occupancy levels in 2018.

Northern Ireland bedspace occupancy levels were only higher during January and February when compared with 2018. Bedspace occupancy levels in August were recorded at 59%, the highest occupancy rate in a single month in Northern Ireland during this year but the lowest bedspace occupancy recorded in August since 2015. During January, a 6 percentage point increase was the largest recorded in a single month when compared against the same month the previous year.

# Summary: Room and Bedspace occupancy in detail

Annual weekday room occupancy levels in the UK remained static during 2019 at 76% when compared to 2018, whilst bedspace occupancy fared better increasing by 2 percentage points. Weekday room occupancy levels in England remained at the same level as seen in 2018 with bedspace occupancy witnessing a small increase of 1 percentage point. Scotland also saw bedroom occupancy remain static at 68% but bedspace occupancy fell by 2 percentage points from 49% in 2018 to 47% in 2019. As with England and Scotland, bedroom occupancy levels during the weekday in Wales remained static when compared to 2018 at 59%, with bedspace occupancy showing a similar picture consistent with 2018 at 42%. Wales had the most consistent weekday room and bed occupancy across the five years under review when compared with other nations. Northern Ireland witnessed a downturn of 4 percentage points in both measures of occupancy; room occupancy was recorded at 54% with bedspace at 36%, the lowest levels since 2015.

Room occupancy levels in the UK during the weekend in 2019 fell slightly from 79% to 78%, whilst bedspace occupancy experienced a decrease of 2 percentage points, at 64% for 2019. Both room and bedspace occupancy levels in England declined when compared to 2018. Weekend room occupancy was recorded at 80% (down 1 percentage point) with bedspace at 66% down 2 percentage points compared with the previous year. Scotland weekend room occupancy remained static at 67%, with bedspace occupancy experiencing a 3% decrease when compared to 2018. Wales bedroom occupancy levels remained static at 61% during the weekend in 2019, with bed occupancy falling by a single percentage point to 52%. Northern Ireland experienced a downturn in both room and bedspace occupancy rates during the weekend in 2019, by 3 and 4 percentage points respectively.

# Summary: Room and Bedspace occupancy in detail

Both room and bedspace occupancy by location type in Scotland increased in the hotel and guesthouse sectors but the B&B sector fared less well with a drop of 6 percentage points in both room and bedspace occupancy. Accommodation types in Wales remained static in the hotel sector, with a small rise in those staying at guesthouses and B&B's. Northern Ireland saw the biggest change across the four nations with all sectors showing a downturn in room and bed occupancy, with the exception of the guesthouse sector where bed occupancy remained at the same level as 2018

Across the UK, there was very little change across the different type of locations for both measures of occupancy levels. Small towns saw a single percentage point increase in room occupancy, with room occupancy in city/large towns falling by the same amount. Seaside and country/village locations remained static when compared with 2018. Bed occupancy in both small towns and country/village locations remained on a par with the previous year, with both seaside and city/large town locations exhibiting a small decrease in bed occupancy, falling by 1 percentage point each.

# Bedroom Occupancy: UK and National

# UK and National: Annual Bedroom Occupancy 2015 - 2019

Table 1: UK and National Bedroom Occupancy, 2015-2019

	2015	2016	2017	2018	2019
England*	70	71	74	78	78
Scotland	65	64	64	67	67
Wales	61	61	61	61	60
N. Ireland	57	61	63	61	59
UK	69	70	73	77	76

\* England occupancy was calculated using a revised methodology from June 2017. Please see Methodological Note on slide 42 for further details.

# UK: Monthly Bedroom Occupancy 2015 - 2019

Table 2: UK Bedroom Occupancy, 2015-2019

	UK				
	2015	2016	2017	2018	2019
Jan	53	54	54	63	63
Feb	61	63	61	71	70
Mar	61	64	64	73	73
Apr	66	69	69	75	75
May	72	71	73	78	78
Jun	77	77	80	82	80
Jul	79	81	83	85	84
Aug	78	79	81	83	82
Sep	79	80	83	83	82
Oct	73	74	78	81	80
Nov	64	68	75	76	76
Dec	57	61	68	69	68

# National: Monthly Bedroom Occupancy 2015 - 2019

Table 2a: National Bedroom Occupancy, 2015-2019

	England						Scotland						Wales						Northern Ireland				
	2015	2016	2017	2018	2019		2015	2016	2017	2018	2019		2015	2016	2017	2018	2019		2015	2016	2017	2018	2019
Jan	54	55	56	65	65	Jan	57	45	42	51	44	Jan	41	43	43	47	45	Jan	40	33	48	46	52
Feb	63	64	63	74	73	Feb	53	53	42	51	52	Feb	52	51	53	51	49	Feb	55	51	48	54	53
Mar	63	65	66	75	75	Mar	54	55	51	62	64	Mar	55	55	55	53	50	Mar	54	53	54	58	52
Apr	68	70	70	77	76	Apr	61	60	62	60	67	Apr	59	58	64	59	60	Apr	58	59	62	59	52
May	72	72	73	79	79	May	72	69	74	77	78	May	66	61	65	66	66	May	65	66	68	69	63
Jun	78	77	80	82	80	Jun	76	76	79	81	80	Jun	70	67	69	71	70	Jun	68	72	74	73	70
Jul	80	81	84	86	85	Jul	78	79	82	82	80	Jul	75	73	74	71	74	Jul	64	76	72	69	72
Aug	78	79	81	83	82	Aug	79	83	87	87	85	Aug	75	77	75	74	75	Aug	71	79	79	73	75
Sep	80	81	84	84	83	Sep	77	78	80	80	79	Sep	74	72	71	68	70	Sep	63	72	74	69	64
Oct	75	75	80	83	82	Oct	65	67	66	68	66	Oct	66	63	63	57	61	Oct	54	62	64	62	56
Nov	67	70	78	79	79	Nov	53	56	53	55	56	Nov	54	55	57	56	53	Nov	46	57	57	52	50
Dec	60	63	71	72	71	Dec	49	48	48	48	51	Dec	48	51	47	53	50	Dec	42	51	51	48	45

# UK: Annual and Seasonal Bedroom Occupancy Averages 2015 - 2019

Table 3: UK Bedroom Occupancy, 2015-2019

	UK				
	2015	2016	2017	2018	2019
Apr-Oct Average	75	76	78	81	80
Jul-Sep Average	79	80	83	84	83
Annual Average	69	70	73	77	76

# National: Annual and Seasonal Bedroom Occupancy Averages 2015 - 2019

Table 3a: UK and National Bedroom Occupancy, 2015-2019

	England				Scotland				Wales				N. Ireland		
	Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave
2015	76	79	70	2015	73	78	65	2015	69	75	61	2015	63	66	57
2016	76	80	71	2016	73	80	64	2016	67	74	61	2016	69	76	61
2017	79	83	74	2017	76	83	64	2017	69	73	61	2017	70	75	63
2018	82	84	78	2018	76	83	67	2018	67	71	61	2018	68	70	61
2019	81	83	78	2019	76	81	67	2019	68	73	60	2019	64	70	59

# UK: Annual Bedroom Occupancy Trends 2015 - 2019

Table 4: UK Annual Bedroom Occupancy Trends, 2015-2019

	UK		
	15-17	16-18	17-19
Jan	54	57	60
Feb	61	65	68
Mar	63	67	70
Apr	68	71	73
May	72	74	76
Jun	78	79	80
Jul	81	83	84
Aug	79	81	82
Sep	81	82	83
Oct	75	78	80
Nov	69	73	76
Dec	62	66	69

# National: Annual Bedroom Occupancy Trends 2015 - 2019

Table 4a: National Bedroom Occupancy Trends, 2015-2019

	England		
	15-17	16-18	17-19
Jan	55	59	62
Feb	63	67	70
Mar	65	69	72
Apr	69	72	74
May	72	75	77
Jun	78	80	81
Jul	82	84	85
Aug	79	81	82
Sep	82	83	84
Oct	77	79	82
Nov	72	76	79
Dec	65	69	71

	Scotland		
	15-17	16-18	17-19
Jan	48	46	46
Feb	49	49	48
Mar	53	56	59
Apr	61	61	63
May	72	73	76
Jun	77	79	80
Jul	80	81	81
Aug	83	85	86
Sep	78	80	80
Oct	66	67	67
Nov	54	55	55
Dec	48	48	49

	Wales		
	15-17	16-18	17-19
Jan	42	44	46
Feb	52	52	52
Mar	55	54	53
Apr	60	60	61
May	64	64	65
Jun	69	69	70
Jul	74	73	73
Aug	76	75	75
Sep	72	70	70
Oct	64	61	60
Nov	55	56	55
Dec	49	50	50

	N. Ireland		
	15-17	16-18	17-19
Jan	40	43	49
Feb	51	51	51
Mar	54	55	54
Apr	60	60	58
May	66	67	67
Jun	71	73	73
Jul	71	72	71
Aug	76	77	76
Sep	70	72	69
Oct	60	63	60
Nov	53	55	53
Dec	48	50	48

# UK: Annual Bedroom Occupancy Trends - Averages 2015 - 2019

Table 5: UK Bedroom Occupancy Trends, Averages 2015-2019

	UK		
	2015-17	2016-18	2017-19
Apr-Oct Average	76	78	80
Jul-Sep Average	81	82	83
Annual Average	71	73	75

# National: Annual Bedroom Occupancy Trends - Averages 2015 - 2019

Table 5a: UK and National Bedroom Occupancy, Trends 2015-2019

	England				Scotland				Wales				N. Ireland		
	15-17	16-18	17-19		15-17	16-18	17-19		15-17	16-18	17-19		15-17	16-18	17-19
<b>Apr-Oct Average</b>	77	79	81	<b>Apr-Oct Average</b>	74	75	76	<b>Apr-Oct Average</b>	69	68	68	<b>Apr-Oct Average</b>	68	69	67
<b>Jul-Sep Average</b>	81	83	84	<b>Jul-Sep Average</b>	78	80	81	<b>Jul-Sep Average</b>	74	73	72	<b>Jul-Sep Average</b>	72	74	72
<b>Annual Average</b>	72	74	77	<b>Annual Average</b>	71	70	71	<b>Annual Average</b>	61	61	61	<b>Annual Average</b>	60	62	61

# Bedspace Occupancy: UK and National

# UK and National: Annual Bedspace Occupancy 2015 - 2019

Table1: UK and National Bedspace Occupancy, 2015-2019

	2015	2016	2017	2018	2019
England*	52	52	53	55	55
Scotland	49	49	52	52	51
Wales	47	47	48	47	46
N.Ireland	42	47	48	46	43
UK	51	52	52	55	55

# UK: Monthly Bedspace Occupancy 2015 - 2019

Table 7: UK Bedspace Occupancy, 2015-2019

	UK				
	2015	2016	2017	2018	2019
Jan	38	37	39	44	45
Feb	44	45	44	50	50
Mar	45	46	46	52	51
Apr	49	50	53	54	55
May	55	53	54	57	57
Jun	56	56	57	58	58
Jul	60	61	61	60	60
Aug	63	62	61	63	63
Sep	58	59	58	58	57
Oct	53	53	55	57	57
Nov	45	48	51	53	53
Dec	42	46	50	50	50

# National: Monthly Bedspace Occupancy 2015 - 2019

Table 7a: National Bedspace Occupancy, 2015-2019

	England						Scotland						Wales						Northern Ireland				
	2015	2016	2017	2018	2019		2015	2016	2017	2018	2019		2015	2016	2017	2018	2019		2015	2016	2017	2018	2019
Jan	39	38	39	45	45	Jan	40	30	42	40	28	Jan	30	32	32	34	33	Jan	27	24	35	32	38
Feb	46	46	45	52	52	Feb	36	37	31	40	30	Feb	39	39	40	39	38	Feb	38	39	35	38	39
Mar	47	47	47	53	52	Mar	38	40	34	49	47	Mar	41	41	41	40	38	Mar	39	40	40	42	36
Apr	50	51	53	55	56	Apr	47	44	52	45	50	Apr	46	46	52	46	46	Apr	43	46	49	42	36
May	55	53	54	57	57	May	57	54	57	61	59	May	52	47	50	51	51	May	49	51	51	51	46
Jun	56	56	56	58	58	Jun	59	60	65	63	58	Jun	53	51	53	55	53	Jun	50	52	56	55	55
Jul	60	61	60	60	60	Jul	63	66	71	68	64	Jul	58	58	59	56	56	Jul	51	63	60	55	54
Aug	62	61	60	62	63	Aug	66	69	73	72	70	Aug	62	63	61	61	60	Aug	57	65	65	61	59
Sep	58	59	57	58	57	Sep	59	60	64	63	61	Sep	55	56	55	53	53	Sep	45	54	56	50	42
Oct	54	54	56	58	58	Oct	48	51	52	50	58	Oct	50	48	48	43	45	Oct	41	47	48	42	39
Nov	47	49	53	55	55	Nov	37	39	37	38	41	Nov	39	40	42	41	42	Nov	33	44	40	38	35
Dec	44	47	52	52	51	Dec	35	37	40	36	40	Dec	36	40	37	41	39	Dec	33	39	40	39	32

# UK: Annual and Seasonal Bedspace Occupancy Averages 2015 - 2019

Table 8: UK: Bedspace Occupancy Averages, 2015-2019

	UK				
	2015	2016	2017	2018	2019
Apr-Oct Average	56	56	57	58	58
Jul-Sep Average	60	61	60	61	60
Annual Average	51	52	52	55	55

# National: Annual and Seasonal Bedspace Occupancy Averages 2015 - 2019

Table 8a: National Bedspace Occupancy Averages, 2015-2019

	England				Scotland				Wales				N. Ireland		
	Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave
2015	56	60	52	2015	57	63	49	2015	54	58	47	2015	48	51	42
2016	56	60	52	2016	58	65	49	2016	53	59	47	2016	54	61	47
2017	57	59	53	2017	62	69	52	2017	54	58	48	2017	55	60	48
2018	58	60	55	2018	60	68	52	2018	52	57	47	2018	51	56	46
2019	58	60	55	2019	60	65	51	2019	52	56	46	2019	48	52	43

# UK : Annual Bedspace Occupancy Trends 2015 - 2019

Table 9: UK Annual Bedspace Occupancy, 3 Year Trends, 2015-2019

	UK		
	15-17	16-18	17-19
Jan	38	40	42
Feb	44	46	48
Mar	46	48	50
Apr	51	52	54
May	54	55	56
Jun	56	57	58
Jul	61	61	61
Aug	62	62	63
Sep	58	58	58
Oct	54	55	56
Nov	48	51	52
Dec	46	49	50

# National: Annual Bedspace Occupancy Trends 2015 - 2019

Table 9a: National Bedspace Occupancy, 3 Year Trends, 2015-2019

	England		
	15-17	16-18	17-19
Jan	39	41	43
Feb	46	48	50
Mar	47	49	51
Apr	51	53	55
May	54	55	56
Jun	56	57	57
Jul	60	60	60
Aug	61	61	62
Sep	58	58	57
Oct	55	56	57
Nov	50	52	54
Dec	48	50	52

	Scotland		
	15-17	16-18	17-19
Jan	37	37	37
Feb	35	36	34
Mar	37	41	43
Apr	48	47	49
May	56	57	59
Jun	61	63	62
Jul	67	68	67
Aug	69	71	72
Sep	61	62	63
Oct	50	51	53
Nov	38	38	38
Dec	37	38	39

	Wales		
	15-17	16-18	17-19
Jan	31	33	33
Feb	39	39	39
Mar	41	41	40
Apr	48	48	48
May	50	49	51
Jun	52	53	54
Jul	58	58	57
Aug	62	62	61
Sep	55	55	54
Oct	49	46	45
Nov	40	41	42
Dec	38	39	39

	N. Ireland		
	15-17	16-18	17-19
Jan	29	30	35
Feb	38	37	38
Mar	39	41	39
Apr	46	46	43
May	50	51	49
Jun	53	55	55
Jul	58	59	56
Aug	62	64	62
Sep	52	53	49
Oct	46	46	43
Nov	39	41	38
Dec	37	40	37

# UK: Annual Bedspace Occupancy Trends - Averages 2015 - 2019

Table 10: UK Bedspace Occupancy Averages, 2015-2019

	UK		
	15-17	16-18	17-19
<b>Apr-Oct Average</b>	57	57	58
<b>Jul-Sep Average</b>	60	60	60
<b>Annual Average</b>	52	53	54

# National: Annual Bedspace Occupancy Trends - Averages 2015 - 2019

Table 10a: National Bedspace Occupancy Trends, Averages, 2015-2019

	England				Scotland				Wales				N. Ireland		
	15-17	16-18	17-19		15-17	16-18	17-19		15-17	16-18	17-19		15-17	16-18	17-19
<b>Apr-Oct Average</b>	56	57	58	<b>Apr-Oct Average</b>	59	60	61	<b>Apr-Oct Average</b>	53	53	53	<b>Apr-Oct Average</b>	52	53	51
<b>Jul-Sep Average</b>	60	60	60	<b>Jul-Sep Average</b>	66	67	67	<b>Jul-Sep Average</b>	59	58	57	<b>Jul-Sep Average</b>	57	59	56
<b>Annual Average</b>	52	53	54	<b>Annual Average</b>	50	51	51	<b>Annual Average</b>	47	47	47	<b>Annual Average</b>	46	47	45

# Occupancy in detail: UK and National

# UK and National: Annual Weekday Occupancy 2015 - 2019

Fig 1: UK and National, Annual Weekday Bedroom Occupancy, 2015 – 2019



Fig 2: UK and National, Annual Weekday Bedspace Occupancy, 2015 – 2019

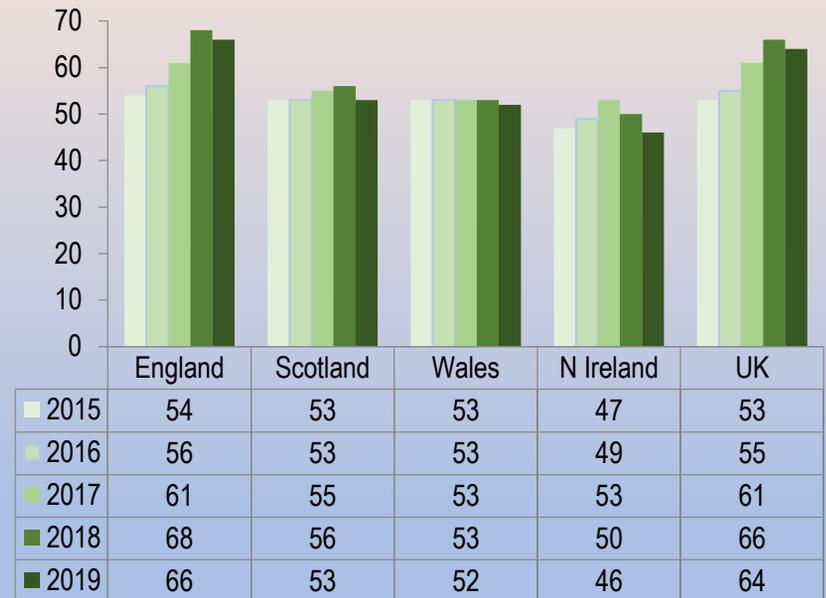


# UK and National: Annual Weekend Occupancy 2015 - 2019

Fig 3: UK and National, Annual Weekend Bedroom Occupancy, 2015 – 2019



Fig 4: UK and National, Annual Weekend Bedspace Occupancy, 2015 – 2019



# National Occupancy: Type of Establishment 2018-2019

Fig 5: National Annual Bedroom Occupancy, 2018 and 2019, by Type of Establishment

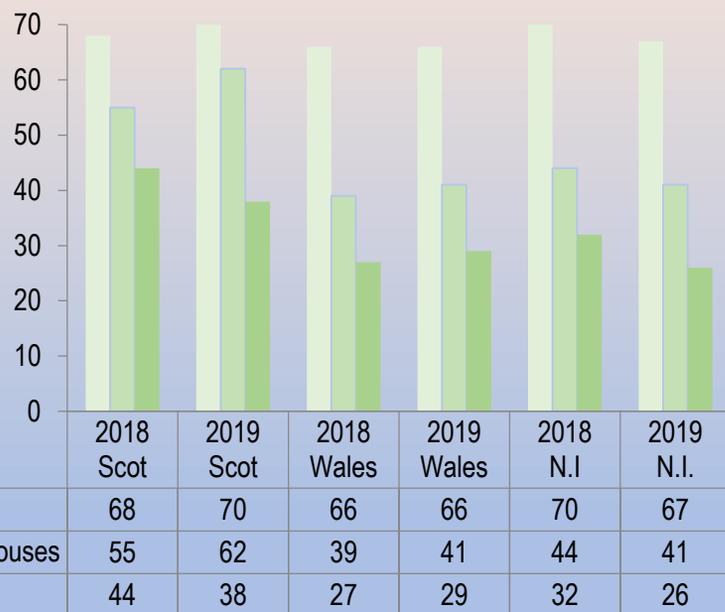
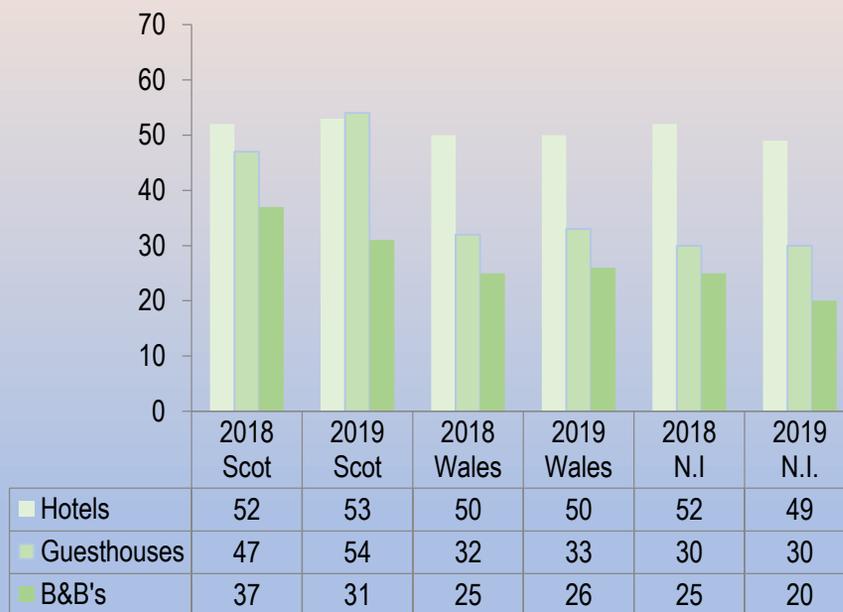


Fig 6: National Annual Bedspace Occupancy, 2018 and 2019, by Type of Establishment



Due to a change in the methodology and collection of data for England from June 2017 onwards, comparable figures for England cannot be shown.

# UK: Annual Occupancy by Location of Establishment 2015 - 2019

Fig 7: UK Annual Bedroom Occupancy, by Location of Establishment, 2015 – 2019

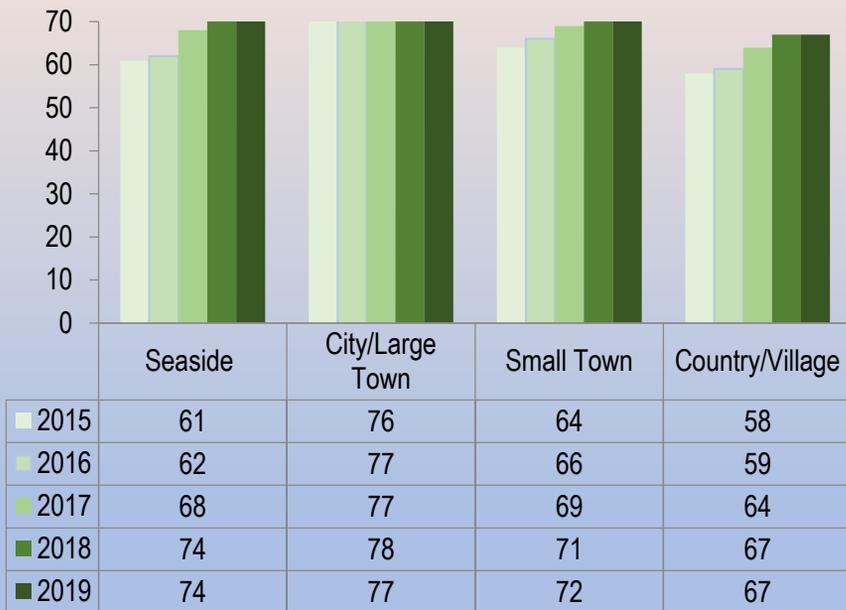
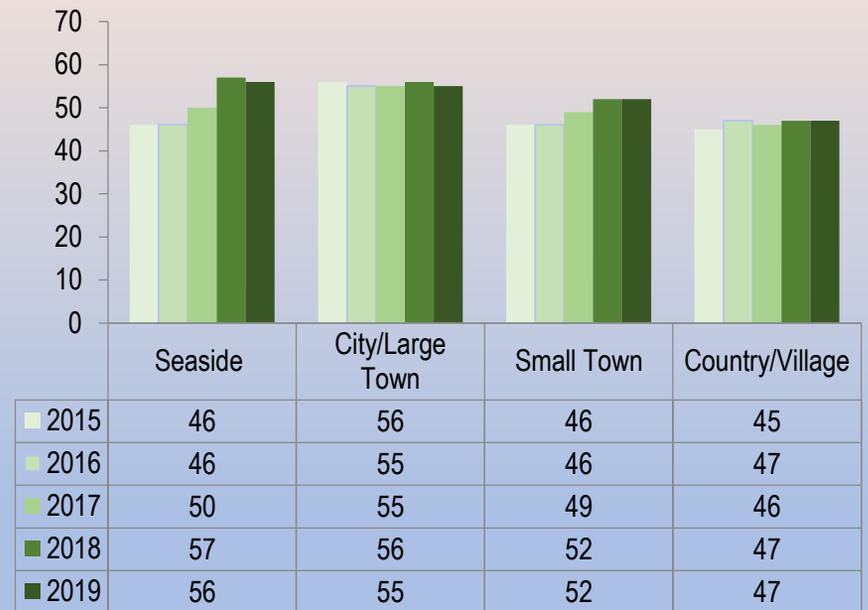


Fig 8: UK Annual Bedspace Occupancy, by Location of Establishment, 2015 – 2019



# Background and methodology

# Background

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 for 2019) 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 may 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)

The Research Solution, 7 Keats Avenue, Beechwood Park. Worcester, WR3 8DU. Tel:+44(0)1905 721440.  
E-mail: [occsurvey@theresearchsolution.co.uk](mailto:occsurvey@theresearchsolution.co.uk)

# Background

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 2019 there were about 39,000 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 7: Distribution of total known accommodation stock 2019 by Number of establishments

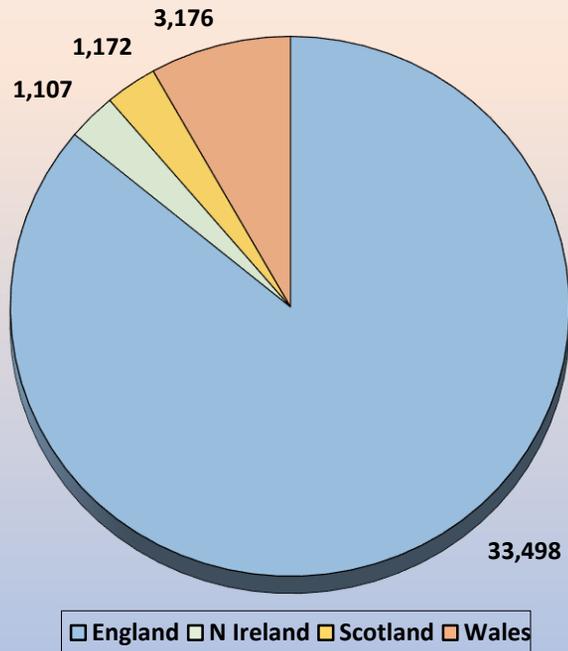
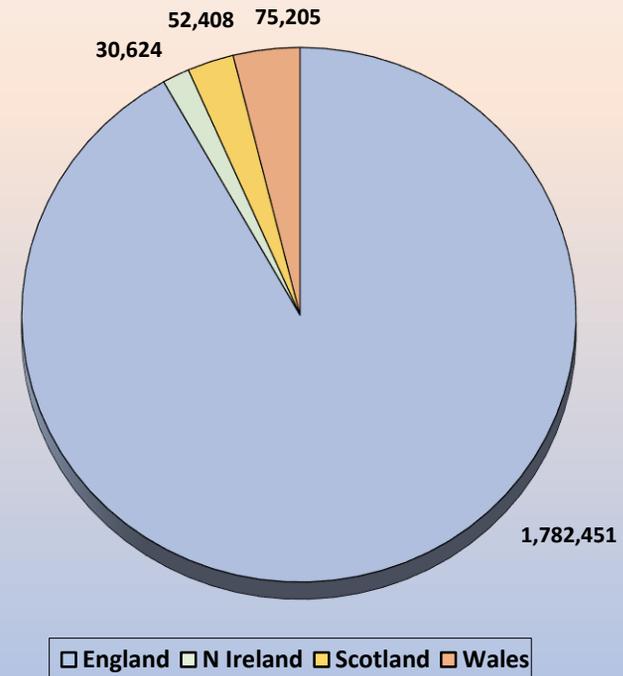


Figure 8: Distribution of total known accommodation stock 2019 by Number of bedspaces



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.

# Methodology

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 2020 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) because of changes in the data collected, it is no longer possible to provide UK/non UK figures for Scotland and England or figures relating to arrivals for Wales.
  - (b) 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 cannot be conducted for England and the UK. Data for Scotland, Wales and Northern Ireland remains unaffected by the change.