

United Kingdom Occupancy Survey

Serviced Accommodation Summary Report

March 2021

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

UK Occupancy Survey

This study has been commissioned by the National Boards of England, Northern Ireland, Scotland and by Visit Wales (part of the Welsh Government) with support from the Department for Digital, Culture, Media and Sport.

The results have been compiled by The Research Solution.

UK % Bedspace Occupancy*

2017 - 2021

Table 1: UK Bedspace Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2017	39	44	46	53	54	57	61	61	58	55	51	50
2018	44	50	52	54	57	58	60	63	58	57	53	50
2019	43	50	51	55	57	58	60	63	57	57	53	50
2020	45	51	25	14	15	14	20	36	32	27	19	18
2021	16	19	23									

Percentage of available bedspaces which were occupied across the UK

* See methodological note on slide 8

N.B. Due to the Covid-19 outbreak in the UK, the serviced accommodation industry saw an unprecedented number of establishments temporarily close their doors from late March 2020 with further lockdowns at different times throughout the year across the four nations. On a sector-wise level these proportions will be an inflation of the occupancy levels in relation to previous years as many more serviced accommodation providers will have been closed owing to the extraordinary circumstances.

UK % Bedroom Occupancy*

2017 – 2021

Table 2: UK Bedroom Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2017	54	61	64	69	73	80	83	81	83	78	75	68
2018	63	71	73	75	78	82	85	83	83	81	76	69
2019	63	70	73	75	78	80	84	82	82	80	76	68
2020	63	69	37	20	20	21	28	48	47	40	28	26
2021	24	27	34									

Percentage of available bedrooms which were occupied across the UK

* See methodological note on slide 8

N.B. Due to the Covid-19 outbreak in the UK, the serviced accommodation industry saw an unprecedented number of establishments temporarily close their doors from late March 2020 with further lockdowns at different times throughout the year across the four nations. On a sector-wise level these proportions will be an inflation of the occupancy levels in relation to previous years as many more serviced accommodation providers will have been closed owing to the extraordinary circumstances.

UK OCCUPANCY OVERVIEW

2,332 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 8 – sample sizes and calculation of rates).

With the continued lockdown across the UK, March saw many accommodation businesses still temporarily closed due to the COVID-19 Pandemic.

Bedspace occupancy across the UK was down from 25% at the start of the pandemic in March 2020 to 23% in March 2021; a decline of 2 percentage points.

Room occupancy in March 2021 was also much lower than pre-pandemic years, but comparable with March 2020. This year we saw a decline of 3 percentage points; from 37% in March 2020 to 34% in March 2021.

Summary of Findings

March 2021 saw the continued temporary closure of many accommodation businesses throughout the UK due to the Covid-19 pandemic. Occupancy levels during March 2021 were lower than March 2020, with room occupancy levels down by 3 percentage points from 37% in 2020 to 34% this year. Bed occupancy also witnessed a slight downturn in occupancy levels, down by 2 percentage points from 25% to 23%, when compared to the same month in 2020.

Room occupancy levels in **England** fell by 4 percentage points when compared with March 2020, down from 37% to 33%. Bed occupancy fell by 3 percentage points; down from 25% in 2020 to 22% in March 2021.

During March 2021, room occupancy levels across **Wales** saw a slight downturn in occupancy, from 40% in March 2020 to 38% in March 2021. Bedspace occupancy was down by 3 percentage points, from 26% to 23%.

Bedspace occupancy levels in **Scotland** fell by 25 percentage points from 29% to 4% when compared with the same period in 2020. Room occupancy also experienced a similar downturn during March 2021, with levels down from 32% to 6%; a fall of 26 percentage points.

Bedspace and room occupancy levels have not been collected in **Northern Ireland** during March 2021 as a result of serviced accommodation being closed due to Covid-19 hospitality restrictions.

With travel across the world continuing to be affected by the Covid-19 pandemic, bedspace occupancy by non-UK residents was not recorded by any of the UK nations (comparable figures for England and Scotland are no longer collected – see note 5a in the Methodology section of this report).

Please note, the temporary closure of accommodation establishments in Northern Ireland has resulted in data not collected during March. Individual results for Northern Ireland are not shown and are therefore not included in the UK figure.

% Occupancy Levels: March 2019 – 2021*

Table3: Bedspace Occupancy

	2019	2020	2021
England*	52	25	22
N. Ireland	36	21	**
Scotland	47	29	4
Wales***	38	26	23
UK	51	25	23

Table 4: Bedroom Occupancy

	2019	2020	2021
England*	75	37	33
N. Ireland	52	26	**
Scotland	64	32	6
Wales***	50	40	38
UK	73	37	34

Table 5: Sample Size*

	2019	2020	2021
England*	3183	3432	2259
N. Ireland	244	37	**
Scotland	128	107	100
Wales	175	168	73
UK	3730	3744	2332

* See methodological note on slide 8

** Please note, the closure of accommodation establishments in Northern Ireland has resulted in data not collected during March. Individual results for Northern Ireland are not shown and are therefore not included in the UK figure

*** Due to a change in methodology comparisons with 2019 figures cannot be made.

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 2021 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 lesser 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 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 patterns identified in the survey are believed to accurately reflect overall trends in the use of serviced accommodation.
7. * **Methodological note:** From June 2017, the England Occupancy estimates have been collected using a revised methodology. The resultant data are statistically more robust but it has caused a break in trends for England and the UK. From June 2017, the new methodology is based on the STR syndicated survey whereas prior to June 2017 the England occupancy data were collected via a bespoke panel with a considerably lower sample size. This methodological change impacted trends and means direct comparisons between England and UK figures collected from June 2017 should not be made with those assembled prior to June 2017. Data for Scotland, Wales and Northern Ireland remains unaffected by the change.

Background

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 and 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 2021) 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 conducted by the individual nations 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