



UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Summary Report
September 2018

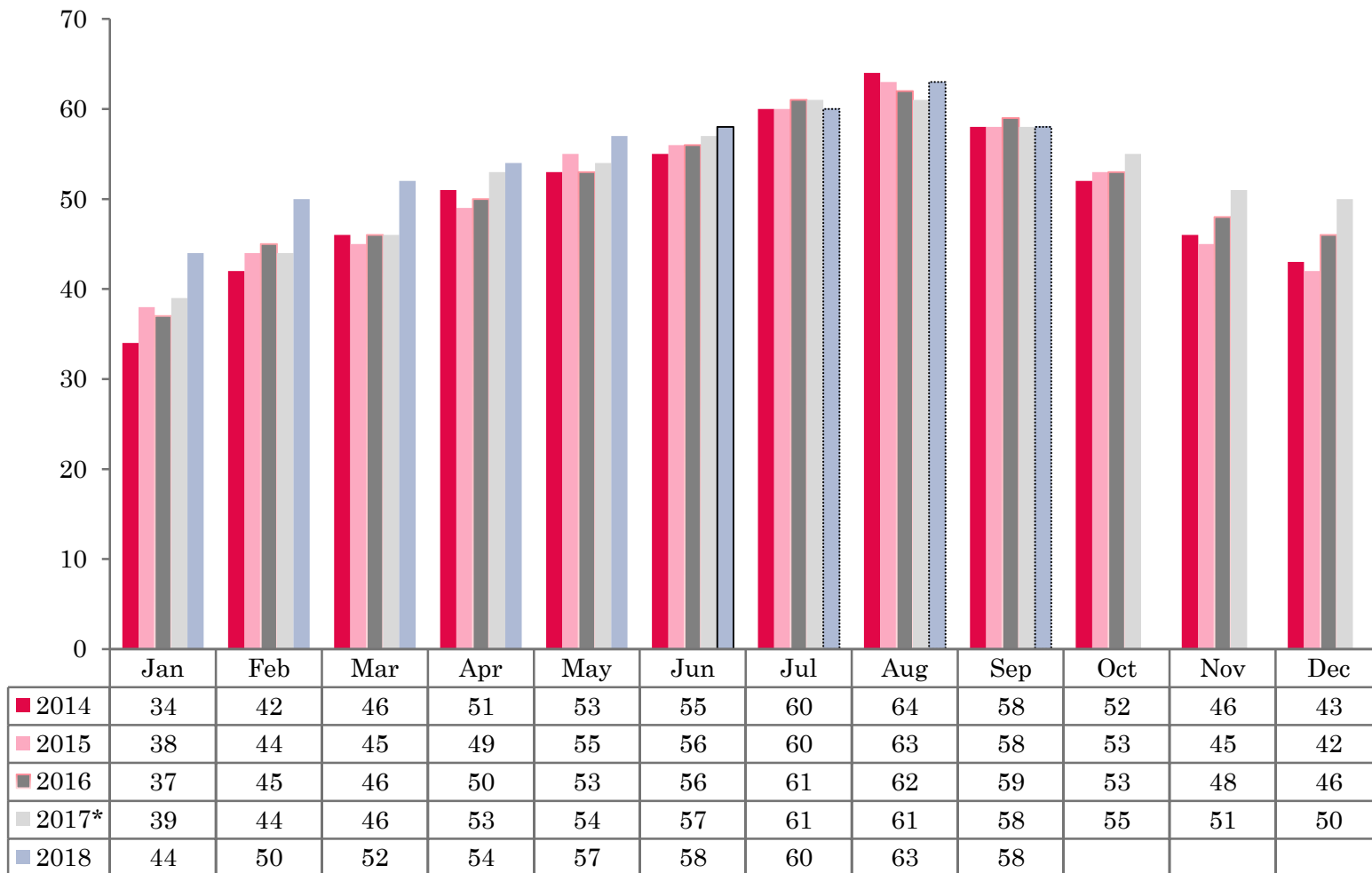
UK OCCUPANCY SURVEY

- This study has been 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.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY*

2014 - 2018

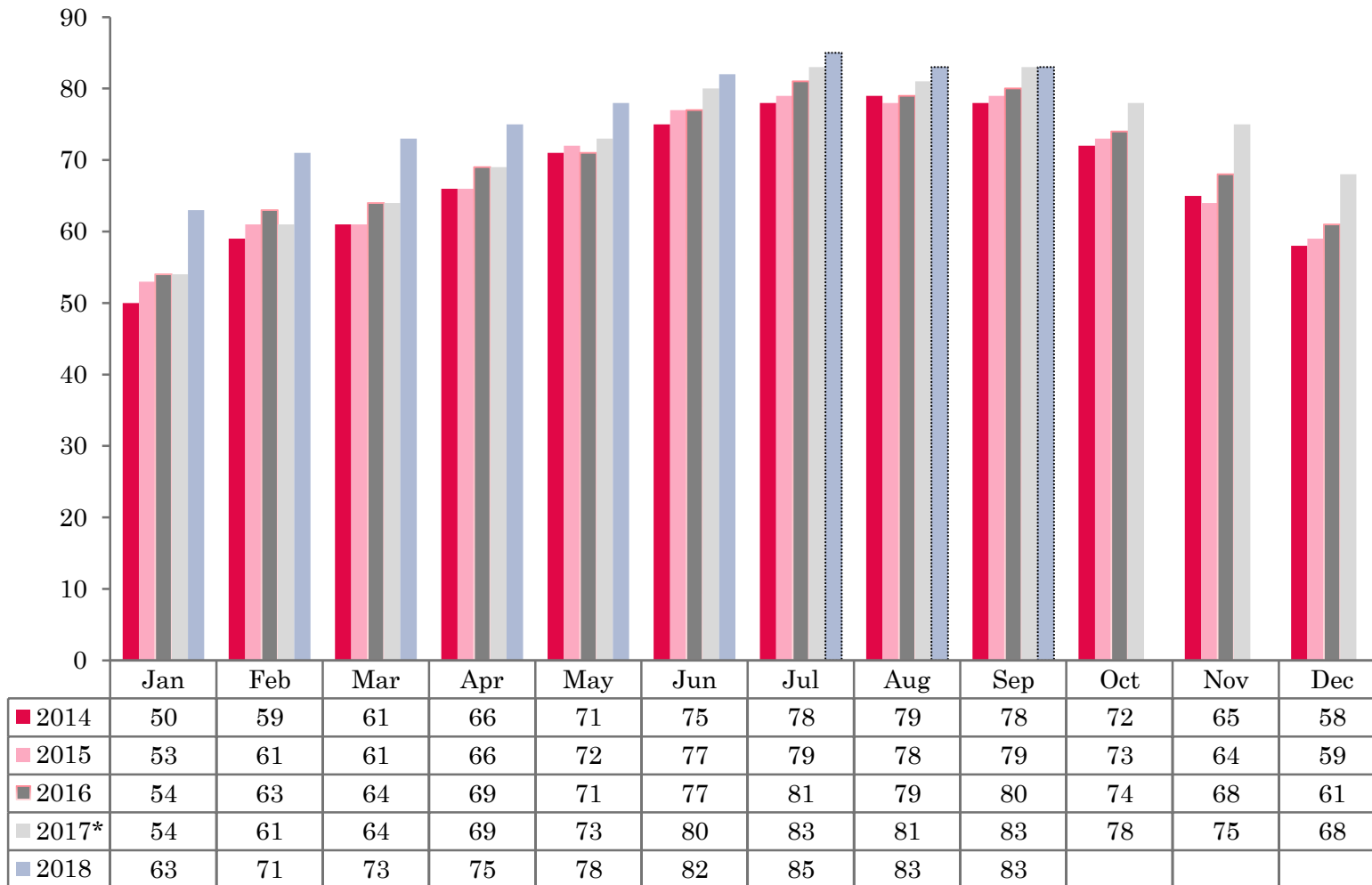


* See methodological note on slide 8



UK BEDROOM OCCUPANCY*

2014 - 2018



* See methodological note on slide 8



- ❖ 3,651 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).
- ❖ Room and bedspace occupancy in the UK remained static in both levels of occupancy during September 2018 when compared to the same month the previous year.



- Both room and bedspace occupancy in the UK remained static during September 2018 with room occupancy levels at 83% and bedspace occupancy at 58%.
- In England, room occupancy mirrored that of the UK as a whole, remaining flat at 84%. Bedspace occupancy saw a small rise of 1 percentage point, up from 57% in September 2017 to 58% during September of this year.
- Both room and bedspace occupancy levels in Northern Ireland fell during the month of September. Room occupancy levels had fallen by 5 percentage points when compared with the same period last year, whilst bedspace occupancy witnessed a downturn of 6 percentage points from 56% to 50% when compared with September 2017.
- Similarly, both measures of occupancy fell in Wales during September, with room occupancy down by 3 percentage points and bedspace occupancy falling by 2 percentage points from 55% in September 2017 to 53% in 2018.
- Room occupancy levels in Scotland remained static at 80% during September, whilst bedspace occupancy fell nominally (-1%) in 2018.
- Across the UK as a whole, bedspace occupancy by non-UK residents remained static at 13% when compared against the previous year. Northern Ireland saw a fall of 3 percentage points with Wales up marginally (+1 percentage point) when compared to the same period in 2017 (comparable figures for England and Scotland are no longer collected – (see notes 5b (changes in data collected) and 7 (methodological changes) Slide 8.



Table 1: Occupancy Levels: September 2016 – 2018*

	Bedspace Occupancy*			Room Occupancy*			Sample Size*		
	2016	2017*	2018	2016	2017*	2018	2016	2017*	2018
England*	59	57	58	81	84	84	1770	3051	3147
Northern Ireland	54	56	50	72	74	69	168	201	187
Scotland	60	64	63	78	80	80	249	148	127
Wales	56	55	53	72	71	68	216	205	190
UK*	59	58	58	80	83	83	2403	3605	3651



* See methodological note on slide 8

Notes

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 2018 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.*
- 8.



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 2018) 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)

