



UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Summary Report
April 2019

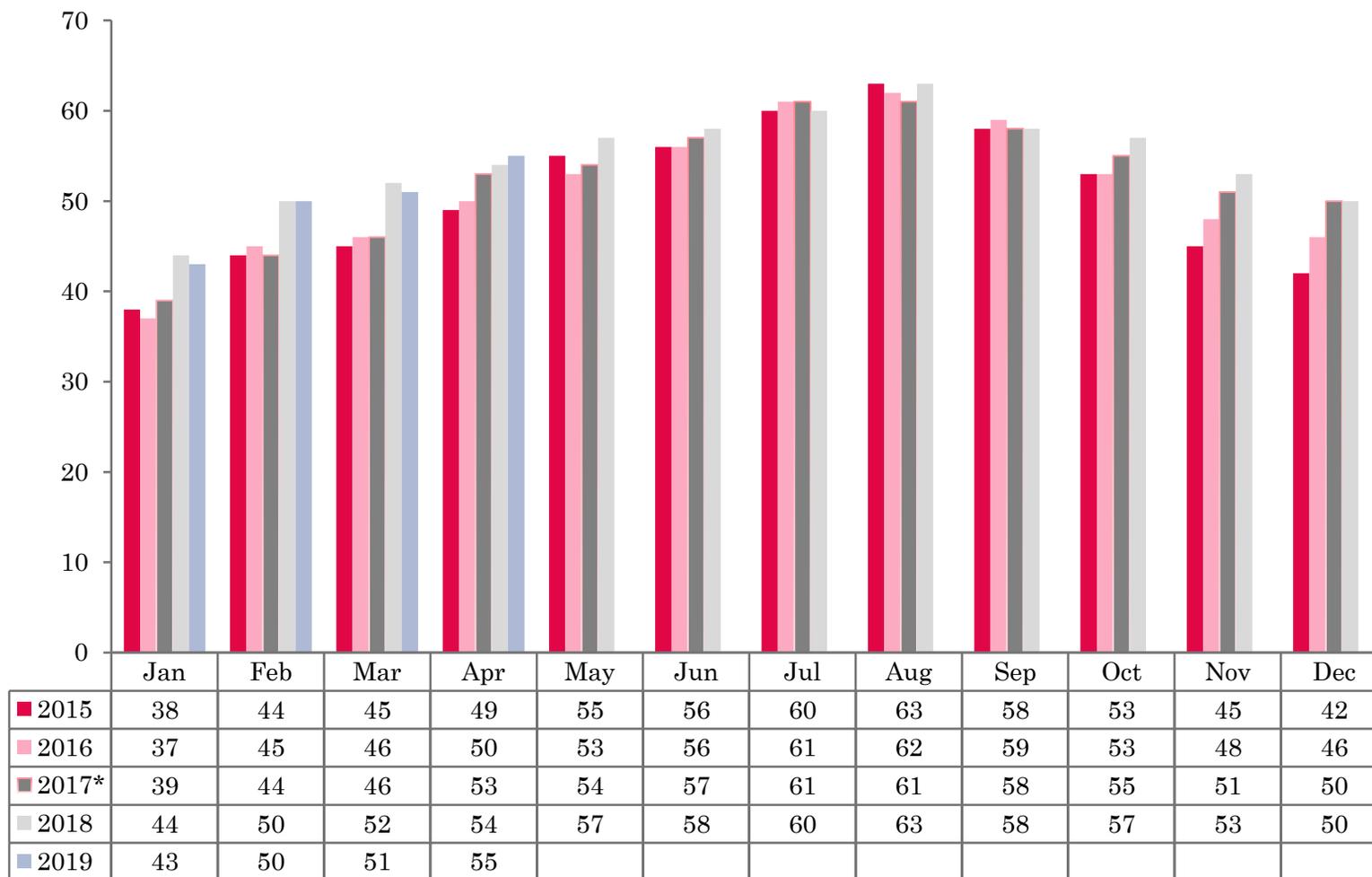
UK OCCUPANCY SURVEY

- 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*

2015 - 2019

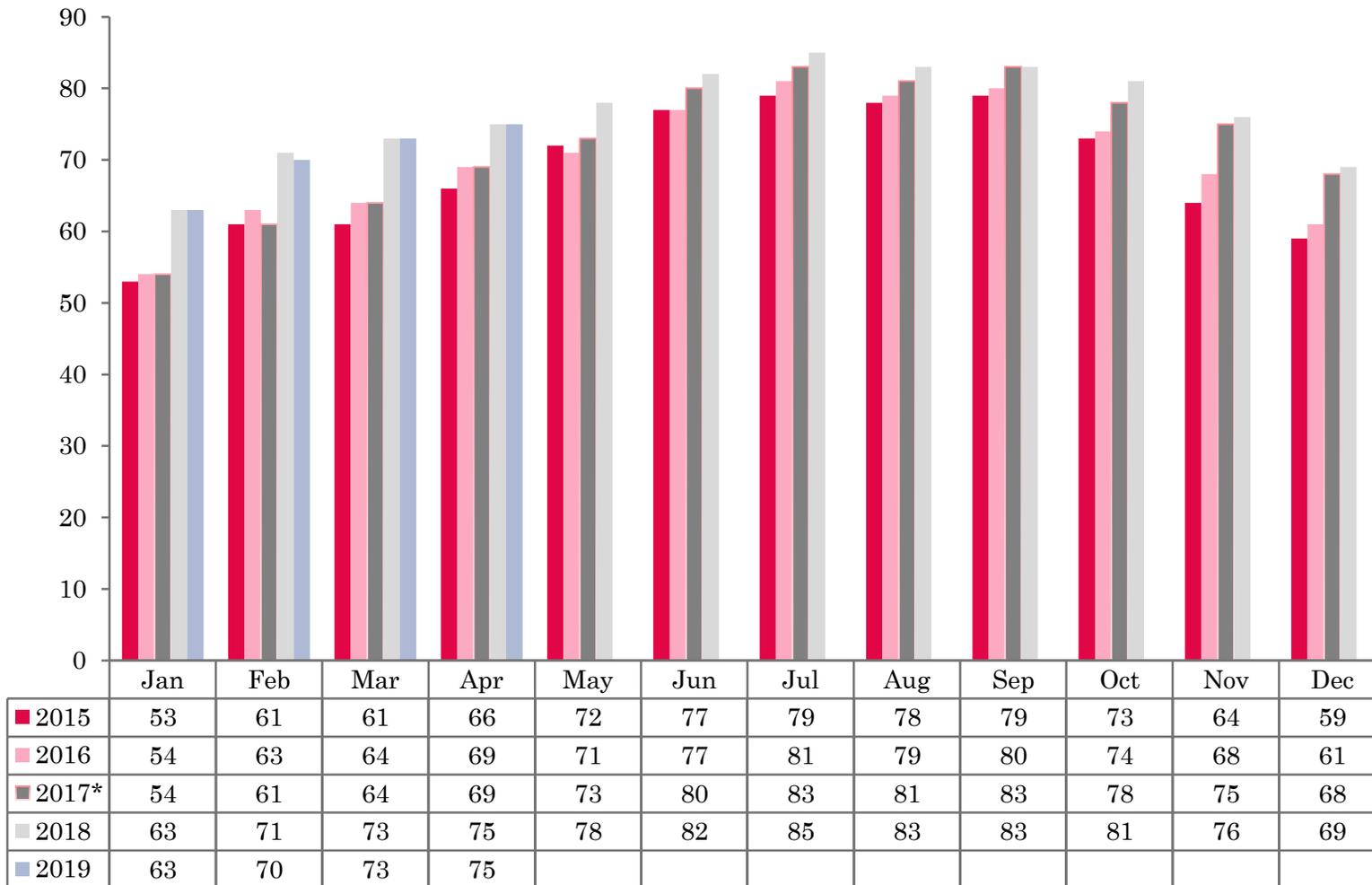


* See methodological note on slide 8



UK BEDROOM OCCUPANCY*

2015 - 2019



* See methodological note on slide 8



- ❖ 3,752 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 occupancy remained static during April 2019 whilst bedspace occupancy increased slightly (+1%) to 55% when compared to the same month the previous year.



- During April 2019 bedspace occupancy in the UK increased by a single percentage point, up from 54% the previous year to 55% this year. Room occupancy in the UK during this month remained on a par with April 2018 at 75%.
- In England, bedspace occupancy witnessed a slight increase, with room occupancy falling slightly. Bedspace occupancy increased by 1 percentage point when compared to the same period in 2018 up from 55% to 56%, with room occupancy down 1 percentage point to 76% during April 2019.
- Occupancy levels in Northern Ireland fell considerably when compared to the same month in the previous year. Room occupancy fell from 59% to 52% and bed occupancy decreased from 42% in April 2018 to 36% in April this year.
- Both room and bedspace occupancy levels in Wales during April remained on a par with 2018 data. Bedspace occupancy remained at 46% during the month of April whilst room occupancy increased by a single percentage point from 59% in 2018 to 60% in 2019.
- Room and bedspace occupancy across Scotland saw a significant upturn in occupancy levels during April 2019 when compared to the same period last year. Bedspace occupancy increased by 5 percentage points, up from 45% in 2018 to 50% in April 2019. Room occupancy witnessed a 7% increase against April 2018, up from 60% to 67% this year.
- Across the UK as a whole, bedspace occupancy by non-UK residents fell slightly by a single percentage point to 9% when compared against the previous year. Northern Ireland saw a decrease of 6 percentage points, down from 27% to 21% in April 2019. Wales remained on a par with March 2018 (3%). (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: April 2017 – 2019*

| | Bedspace Occupancy* | | | Room Occupancy* | | | Sample Size* | | |
|------------------|---------------------|------|------|-----------------|------|------|--------------|------|------|
| | 2017* | 2018 | 2019 | 2017* | 2018 | 2019 | 2017* | 2018 | 2019 |
| England* | 53 | 55 | 56 | 70 | 77 | 76 | 1737 | 3118 | 3193 |
| Northern Ireland | 49 | 42 | 36 | 62 | 59 | 52 | 197 | 196 | 251 |
| Scotland | 52 | 45 | 50 | 62 | 60 | 67 | 209 | 136 | 125 |
| Wales | 52 | 46 | 46 | 64 | 59 | 60 | 200 | 194 | 183 |
| UK* | 53 | 54 | 55 | 69 | 75 | 75 | 2343 | 3644 | 3752 |



* 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 2019 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.*



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)

