



UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Summary Report
July 2019

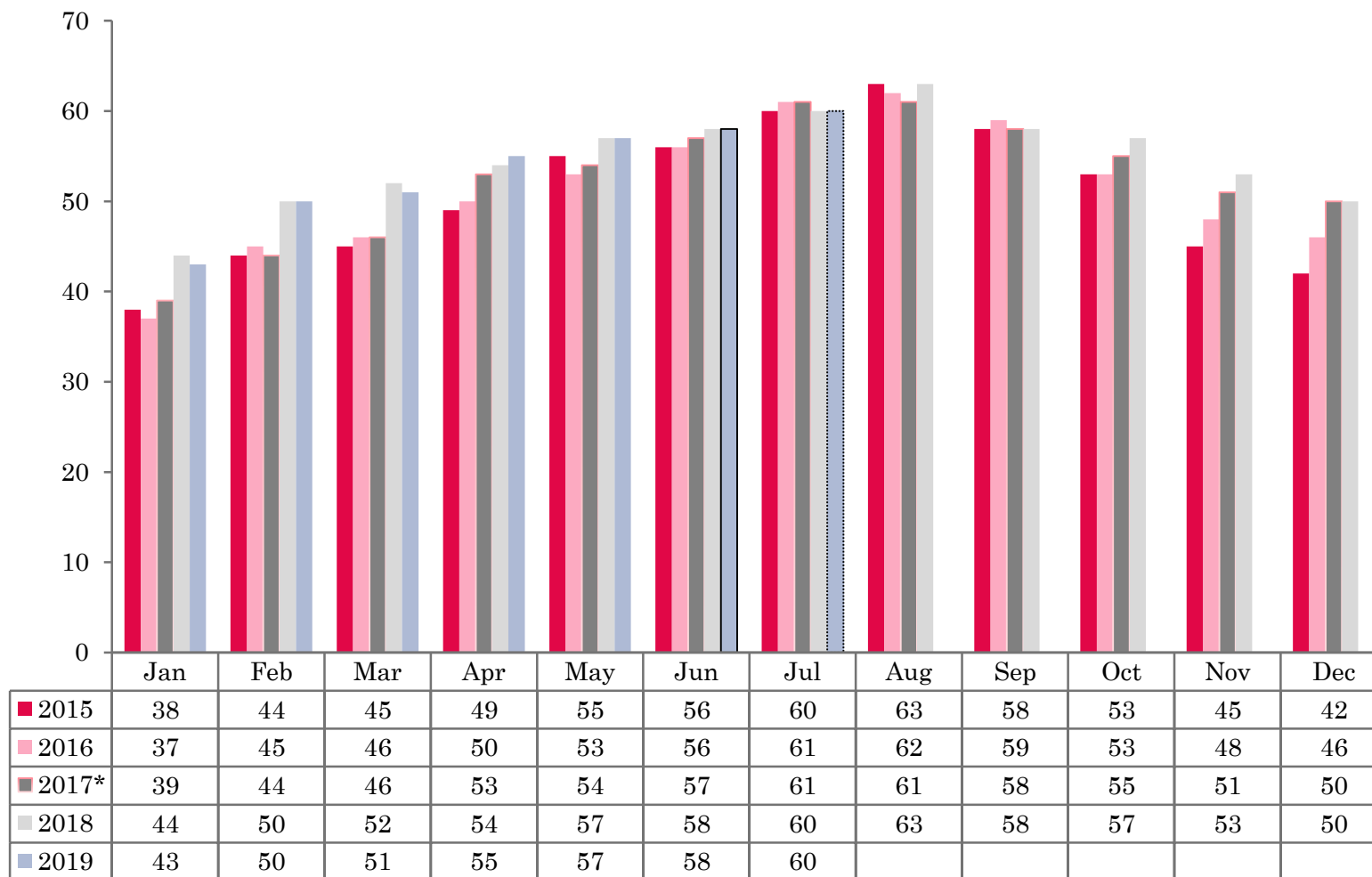
UK OCCUPANCY SURVEY

- 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

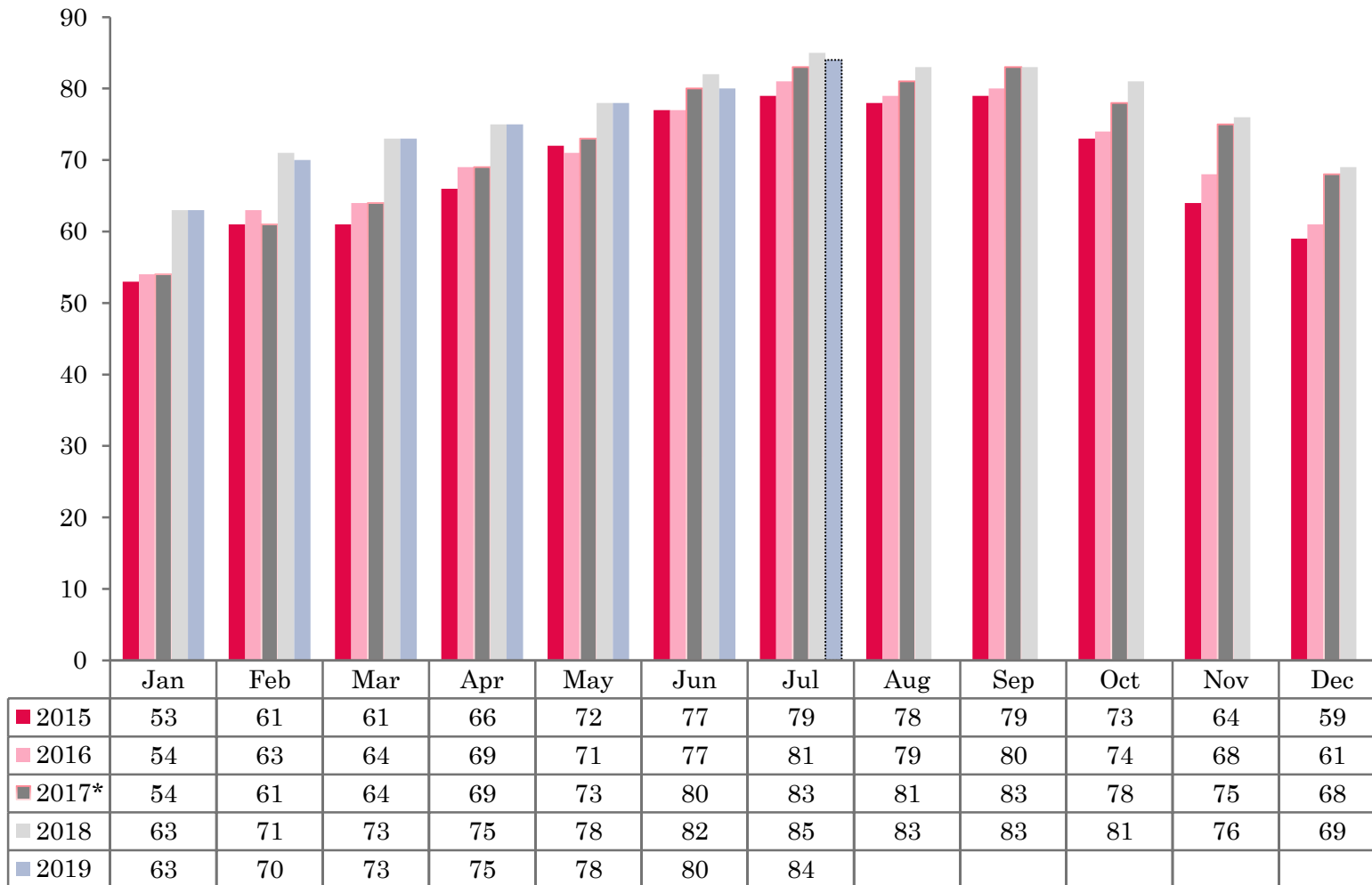


* See methodological note on slide 8



UK BEDROOM OCCUPANCY*

2015 - 2019



* See methodological note on slide 8



- ❖ 3,787 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).
- ❖ Bedspace occupancy remained static during July at 60%. Room occupancy was at 84%, a 1% decrease on the same period in 2018.



- Bed occupancy levels during July had remained static in the UK, with room occupancy falling slightly when compared to the same period the previous year. Bedspace occupancy was recorded at 60%, the same result as recorded in July 2018. Room occupancy was down 1% on the same period in 2018, where levels were at 85% and now at 84%.
- Both room and bed occupancy levels in England mirrored that of the UK. Bedspace occupancy remained at 60% in line with 2018 results, with room occupancy slightly lower than in 2018 at 84%, a single percentage point drop when making a comparison to the previous year.
- Room occupancy levels in Northern Ireland had increased during July when compared to the same month in the previous year. Room occupancy up from 69% in 2018 to 72% this year, with bed occupancy falling by a single percentage point from 55% in 2018 to 54% in July this year.
- During July room occupancy levels in Wales increased by 3% when compared against the same period in 2018, up from 69% in July 2018 to 72% this year. Bedspace occupancy remained static at 56%, the same as recorded during July 2018.
- Both room and bedspace occupancy across Scotland witnessed a downturn in levels during July 2019 when compared to the same period last year. Bedspace occupancy was down 4 percentage points from 68% in 2018 to 64% in July 2019 with room occupancy down from 82% to 80% this year.
- Across the UK as a whole, bedspace occupancy by non-UK residents increased by 2 percentage points to 17% when compared against the same period the previous year. Northern Ireland witnessed a slight increase of a single percentage point, up from 39% to 40% in July 2019. Wales witnessed an increase of 2 percentage points (7%). (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: July 2017 – 2019*

	Bedspace Occupancy*			Room Occupancy*			Sample Size*		
	2017*	2018	2019	2017*	2018	2019	2017*	2018	2019
England*	60	60	60	84	86	85	3045	3170	3265
Northern Ireland	60	55	54	72	69	72	198	197	214
Scotland	71	68	64	82	82	80	159	134	120
Wales	59	56	56	74	71	73	196	191	188
UK*	61	60	60	83	85	84	3598	3692	3787

* 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)

