

United Kingdom Occupancy Survey

Serviced Accommodation Summary Report

August 2020

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 and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Digital, Culture, Media and Sport.

The results have been compiled by The Research Solution.

UK % Bedspace Occupancy*

2016 - 2020

Table 1: UK Bedspace Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2016	37	45	46	50	53	56	61	62	59	53	48	46
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	52	25	15	16	15	20	36				

Percentage of available bedspaces which were occupied across the UK

* See methodological note on slide 8

UK % Bedroom Occupancy*

2016 - 2020

Table 2: UK Bedroom Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2016	54	63	64	69	71	77	81	79	80	74	68	61
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	70	37	20	21	22	27	48				

Percentage of available bedrooms which were occupied across the UK

* See methodological note on slide 8

UK OCCUPANCY OVERVIEW

3369 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).

In August 2020 accommodation businesses throughout the UK had almost fully reopened following on from the closure of many accommodation businesses in late March 2020 due to the COVID-19 Pandemic. However, levels of occupancy were still below that of previous years with bedspace occupancy down from 63% in 2019 to 36% in 2020, a decrease of 27 percentage points. Room occupancy followed a similar pattern, falling 34 percentage points, from 82% in August 2019 to 48% in 2020.

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. 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.

Summary of Findings

During August, accommodation businesses in the main were once again open across most of the UK following on from the temporary closure of businesses, that had been in place since late March due to the COVID-19 Pandemic. When compared to the previous year, occupancy levels were still significantly lower in August 2020 with room occupancy down by 34 percentage points from 82% in 2019 to 48% in 2020. Bed occupancy fell by 27 percentage points from 63% to 36%, when compared to the same month the previous year.

Room occupancy in **England** during August mirrored that of the UK, with occupancy levels falling by 35 percentage points compared with the same period in 2019. Bed occupancy fell by 28 percentage points, down from 63% in 2019 to 35% in August this year.

During August **Northern Ireland** witnessed a decrease in both measures of occupancy when compared to 2019. Room occupancy was down from 75% in 2019 to 44% this year, with bed occupancy falling by 19 percentage points from 59% in 2019 to 40% in August this year.

Wales* fared much better than all other regions of the UK. Room occupancy was 68% and bedspace occupancy was 50% during August 2020.

Bedspace occupancy levels in **Scotland** during August 2020 recorded the lowest occupancy levels across each of the nations witnessing a fall of 31 percentage points from 70% in 2019 to 39% this year. Room occupancy levels fell from 85% in 2019 to 49% in August 2020.

With travel across the world affected by the Covid-19 pandemic, across the UK as a whole, bedspace occupancy by non-UK residents was 6%, falling by 12 percentage points when compared against the same period the previous year. Northern Ireland witnessed a fall of 24 percentage points in occupancy levels, down from 42% in August 2019 to 18% in August 2020. Wales recorded non-UK bedspace occupancy of 1% in August this year. (Comparable figures for England and Scotland are no longer collected) – see notes 5b changes in data collected and 7 (methodological changes) Slide 8.

*Due to a change in methodology during 2020, the Wales data shown within this report cannot be compared with previous years

% Occupancy Levels: August 2018 – 2020*

Table3: Bedspace Occupancy

	2018	2019	2020
England*	62	63	35
N. Ireland	61	59	40
Scotland	72	70	39
Wales**	61	60	50
UK	63	63	36

Table 4: Bedroom Occupancy

	2018	2019	2020
England*	83	82	47
N. Ireland	73	75	44
Scotland	87	85	49
Wales**	74	75	68
UK	83	82	48

Table 5: Sample Size*

	2018	2019	2020
England*	3139	3268	2973
N. Ireland	195	214	156
Scotland	128	120	62
Wales	188	185	178
UK	3650	3787	3369

* See methodological note on slide 8

**Due to a change in methodology during 2020, the Wales data shown within this report cannot be compared with previous years

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.

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