

United Kingdom Occupancy Survey

Serviced Accommodation Summary Report

November 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 | 52 | 25 | 15 | 16 | 15 | 20 | 36 | 32 | 27 | 19 | 18 |
| 2021 | 16 | 19 | 23 | 24 | 32 | 43 | 48 | 54 | 52 | 52 | 47 | |

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 | 70 | 37 | 20 | 21 | 22 | 27 | 48 | 47 | 40 | 28 | 26 |
| 2021 | 24 | 27 | 34 | 34 | 46 | 58 | 64 | 72 | 72 | 68 | 67 | |

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 both 2020 and 2021 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

3,936 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data during November 2021, 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).

Occupancy levels during November 2021 were substantially higher when compared to the same period in November 2020 when Covid-19 restrictions had been re-introduced across many areas of the UK.

Bedspace occupancy was 47% in November 2021, an increase of 28 percentage points on the same month in 2020 (19%). Room occupancy was also much higher than in 2020, up from 28% in November 2020 to 67% in 2021, an increase of 39 percentage points.

% Occupancy Levels: November 2019 – 2021*

Table3: Bedspace Occupancy

| | 2019 | 2020 | 2021 |
|------------|------|------|------|
| England* | 55 | 19 | 47 |
| N. Ireland | 35 | - | 38 |
| Scotland | 41 | 15 | 44 |
| Wales** | 42 | 25 | 46 |
| UK | 53 | 19 | 47 |

Table 4: Bedroom Occupancy

| | 2019 | 2020 | 2021 |
|------------|------|------|------|
| England* | 79 | 28 | 68 |
| N. Ireland | 50 | - | 57 |
| Scotland | 56 | 23 | 56 |
| Wales** | 52 | 37 | 69 |
| UK | 76 | 28 | 67 |

Table 5: Sample Size*

| | 2019 | 2020 | 2021 |
|------------|------|------|------|
| England* | 3292 | 2370 | 3453 |
| N. Ireland | 185 | 0 | 225 |
| Scotland | 115 | 92 | 85 |
| Wales** | 178 | 136 | 173 |
| UK | 3770 | 2598 | 3936 |

* See methodological note on slide 8

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

Summary of Findings

Across the UK as a whole, occupancy levels during November 2021 were substantially higher when compared to the same period in 2020, when COVID-19 restrictions were again in place across many areas of the UK. Room occupancy levels across the UK were up by 39 percentage points from 28% in 2020 to 67% this year. Bed occupancy also saw an increase in occupancy levels, up by 28 percentage points from 19% in 2020 to 47% in November 2021.

Room occupancy levels in **England** increased by 40 percentage points in November 2021 when compared with the same month in 2020, up from 28% to 68%. Bed occupancy increased by 28 percentage points; from 19% in November 2020 to 47% in November this year.

Across **Wales** as a whole, occupancy rates were significantly higher during the month of November 2021 when compared to the same month in 2020. Room occupancy was up by 32 percentage points on the same month the previous year whilst bedspace occupancy saw an increase of 21 percentage points, up from 25% in 2020 to 46% in November this year.

Both room and bedspace occupancy levels in **Scotland** during November 2021 saw an increase when compared to the previous year. Room occupancy levels in Scotland rose significantly by 33 percentage points from 23% to 56% with a significant increase in bedspace occupancy, up 29 percentage points during November from 15% in 2020 to 44% in 2021.

Room occupancy levels in **Northern Ireland** were 57% during November 2021, a comparison cannot be made with November 2020 data as no results were collected for this period in Northern Ireland. Bedspace occupancy levels in November 2021 were 38%.

With travel across the world still affected by the Covid-19 pandemic, bedspace occupancy by non-UK residents was 26% in Northern Ireland. (comparable figures for England and Scotland are no longer collected – see note 5a in the Methodology section of this report).

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)

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