

# United Kingdom Occupancy Survey

Serviced Accommodation Summary Report

September 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			

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			

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 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 OCCUPANCY OVERVIEW

3,791 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).

Across the UK as a whole, bedspace occupancy was 52% in September 2021, an increase of 20 percentage points on the same month in September 2020 (32%) - when businesses were still beginning their recovery from the COVID-19 pandemic. Similarly, room occupancy was also much higher than in 2020, up from 47% in September 2020 to 72% in 2021, an upturn of 25 percentage points.

# Summary of Findings

In general, occupancy levels during September 2021 were still noticeably higher when compared to the same period in 2020, although still not at the levels seen in 2019. Room occupancy levels across the UK were up by 25 percentage points from 47% in 2020 to 72% this year. Bed occupancy also saw a sizeable increase in occupancy levels, up by 20 percentage points from 32% in 2020 to 52% in September 2021.

Room occupancy in **England** almost mirrored that of the UK as a whole with an increase in occupancy levels of 26 percentage points when compared with the same month in 2020, up from 46% to 72%. Bed occupancy also increased by 19 percentage points; from 31% in September 2020 to 50% in September this year.

Across **Wales** as a whole, occupancy rates were again higher during the month of September 2021 when compared to the same month in 2020. Room occupancy was up by 13 percentage points on the same month the previous year whilst bedspace occupancy saw a smaller increase of 5 percentage points, up from 49% in 2020 to 54% in September this year.

Room and bedspace occupancy levels in **Scotland** during September 2021, saw an upturn when compared to the previous year. September 2021 room occupancy levels in Scotland rose by 23 percentage points from 50% to 73% with a significant increase in bedspace occupancy, up 30 percentage points during September from 37% in 2020 to 67% in 2021.

Room occupancy in **Northern Ireland** recorded an increase of 30 percentage points when compared to September 2020 (38%). Bedspace occupancy levels in September 2021 were 55%, a 23 percentage point increase when compared to the same period in 2020 (32%).

With travel across the world still showing some affects of the Covid-19 pandemic, bedspace occupancy by non-UK residents was 35% in Northern Ireland and 1% in Wales. (comparable figures for England and Scotland are no longer collected – see note 5a in the Methodology section of this report).

# % Occupancy Levels: September 2019 – 2021\*

Table3: Bedspace Occupancy

	2019	2020	2021
England*	57	31	50
N. Ireland	42	32	55
Scotland	61	37	67
Wales**	53	49	54
UK	57	32	52

Table 4: Bedroom Occupancy

	2019	2020	2021
England*	83	46	72
N. Ireland	64	38	68
Scotland	79	50	73
Wales**	70	66	79
UK	82	47	72

Table 5: Sample Size\*

	2019	2020	2021
England*	3275	3216	3373
N. Ireland	218	260	136
Scotland	120	90	100
Wales**	183	180	182
UK	3796	3746	3791

\* See methodological note on slide 8

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

# 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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