

United Kingdom Occupancy Survey

Serviced Accommodation Summary Report

November 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	32	27	19	

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	47	40	28	

Percentage of available bedrooms which were occupied across the UK

* See methodological note on slide 8

UK OCCUPANCY OVERVIEW

2598 hotels, guesthouses and bed and breakfast establishments throughout the UK (excluding Northern Ireland, see footnote below) 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).

As with the previous month, November saw many accommodation businesses throughout the UK temporarily close once again due to the COVID-19 Pandemic. This differed throughout the 4 nations with COVID-19 Tier levels and lockdowns in place. Occupancy levels were again below that of previous years. Bedspace occupancy across the UK was down from 53% in 2019 to 19% in 2020, a fall of 34 percentage points. This same pattern was also evident in room occupancy, where occupancy levels had fallen 48 percentage points, from 76% in November 2019 to 28% in the November 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.

Please note, the temporary closure of accommodation establishments in Northern Ireland has resulted in data not collected during November. Individual results for Northern Ireland are not shown and are therefore not included in the UK figure.

Summary of Findings

As with the previous month, November saw many accommodation businesses throughout the UK temporarily close once again due to the COVID-19 Pandemic. This differed throughout the 4 nations with COVID-19 Tier levels and lockdowns in place. When compared to the previous year, occupancy levels were still understandably lower during November 2020 with room occupancy levels falling by 48 percentage points from 76% in 2019 to 28% in 2020. Bed occupancy followed a similar pattern, down by 34 percentage points from 53% to 19%, when compared to the same month in 2019.

Room occupancy in **England** during November saw occupancy levels falling by 51 percentage points compared with the same month the previous year. Bed occupancy fell by 36 percentage points, down from 55% in 2019 to 19% when compared with the same period in 2019, the largest fall in both room and bed occupancy across all nations.

Although lockdown was still in place across Wales until 9th November 2020, occupancy levels across **Wales*** fared better than England and Scotland with room occupancy at 37% in November this year. Bedspace occupancy levels in Wales were at 25%.

During November 2020, Bedroom occupancy levels in **Scotland** fell by 33 percentage points from 56% to 23% when compared with the same month in 2019. Bedspace occupancy also witnessed a downturn during November, with levels down from 41% to 15% a fall of 26 percentage points.

With travel across the world continuing to be affected by the Covid-19 pandemic, bedspace occupancy by non-UK residents was only recorded for Wales (0%) as Northern Ireland did not collect any data during this month. (Comparable figures for England and Scotland are no longer collected) – see notes 5b changes in data collected and 7 (methodological changes) Slide 8.

Please note, the temporary closure of accommodation establishments in Northern Ireland has resulted in data not collected during November. Individual results for Northern Ireland are not shown and are therefore not included in the UK figure.

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

% Occupancy Levels: November 2018 – 2020*

Table3: Bedspace Occupancy

	2018	2019	2020
England*	55	55	19
N. Ireland**	38	35	**
Scotland	38	41	15
Wales***	41	42	25
UK	53	53	19

Table 4: Bedroom Occupancy

	2018	2019	2020
England*	79	79	28
N. Ireland**	52	50	**
Scotland	55	56	23
Wales***	56	52	37
UK	76	76	28

Table 5: Sample Size*

	2018	2019	2020
England*	3131	3292	2370
N. Ireland	195	185	0
Scotland	121	115	92
Wales	181	178	136
UK	3628	3770	2598

* See methodological note on slide 8

** Please note, the closure of accommodation establishments in Northern Ireland has resulted in data not collected during November. Individual results for Northern Ireland are not shown and are therefore not included in the UK figure.

***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)