

United Kingdom Occupancy Survey

Serviced Accommodation

Annual Report 2020

On behalf of VisitEngland, Visit Scotland, Visit Wales and NISRA (Northern Ireland Statistics and Research Agency)

Introduction

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation in 2020 which is jointly 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 shown in this report will show significant falls in occupancy levels relating to the temporary closure of all accommodation businesses across the UK due to the COVID-19 Pandemic. From 23 March 2020, many businesses (excluding those providing accommodation to key workers) were closed until early July. Further lockdowns/firebreaks were implemented in each of the four nations which again saw the temporary closure of accommodation businesses in certain periods in October, November and December. Therefore, the results for these months should be viewed with caution.

The data reported in those months affected by COVID-19 is based on net occupancy which refers only to those businesses that were open and who provided data during this period.

This report has been compiled by Christine King at The Research Solution.

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Summary: Bedroom Occupancy

Following the dramatic fall in room occupancy in the UK due to the temporary closure of many businesses affected by the COVID-19 Pandemic in 2020, room occupancy across the UK fell 39 percentage points from 76% in 2019 to 37% in 2020. England mirrored the UK as a whole with a downturn of 40 percentage points on the previous year (78% to 38%). Scotland saw the biggest drop in room occupancy in 2020, down from 67% in 2019 to 21% in 2020, a decrease of 46 percentage points. Northern Ireland also experienced a sharp decline over the year as a whole, with occupancy down 40 percentage points compared with 2019. Due to a change in methodology during 2020, the Wales data cannot be compared to previous years. During 2020, the annual room occupancy average for Wales was 36%.

Before the lockdown in March 2020, the early months of January and February were on a par with room occupancy recorded in both 2018 and 2019. During the height of the pandemic from April to June 2020 when many accommodation businesses were temporarily closed, the fall in occupancy levels peaked at 55 , 57 and 58 percentage points respectively. With the lifting of restrictions in early July, the summer months saw an upturn in room occupancy although these were still significantly below the normal levels for this time of year. The last quarter of the year saw room occupancy further decline with more restrictions in place across the country.

Monthly bedroom occupancy levels in England during 2020 decreased in all but 2 months of the year. Both January and February had maintained room occupancy levels seen in 2018 and 2019. However, the full effect of the pandemic can be seen with May, June and July all seeing room occupancy levels fall by 54 and 56 percentage points respectively. August saw the smallest drop in occupancy levels, down 35 percentage points on the previous year, but still below what would be expected during the main holiday season.

Summary: Bedroom Occupancy

Bedroom occupancy in Scotland recorded an increase in only one month of 2020 with January up 6 percentage points on the same month in 2019. The reverse was seen in February, with a downturn on room occupancy levels from 52% to 38%, a decrease of 14 percentage points. With the UK in lockdown from late March, the months of April, May and June recorded levels of 1% or less during this period. August and September saw room occupancy rise but still far short of the levels seen in previous years.

Across Wales, monthly occupancy was at its highest in February 2020 at 71%, followed by August and September (58% and 60% respectively). With further restrictions in place during the autumn and winter months, December recorded room occupancy levels of only 25%. Due to a change in methodology in Wales during 2020, the Wales data cannot be compared with previous years.

In Northern Ireland, monthly occupancy rates were lower in every month during 2020. Due to the temporary closure of accommodation businesses, several months did not have data available (April, May, June and November). The biggest fall was seen in July, down from 72% in 2019 to 21% in 2020, a decrease of 51 percentage points. However, it should be noted that many businesses did not reopen until part way through July.

Summary: Bedspace Occupancy

Bedspace occupancy in the UK followed the same pattern as room occupancy during 2020. Overall, bedspace occupancy declined by 29 percentage points from 55% in 2019 to 26% in 2020. Occupancy rates in England mirrored that of the UK, with both Scotland (14%) and Northern Ireland (15%) witnessing a drop in bed occupancy levels by 37 and 28 percentage points respectively. Bed occupancy across Wales was 25%, similar to the UK as a whole.

Monthly data analysis shows that bedspace occupancy in the UK stayed the same in January (45%) and slightly increased in February (up 2 percentage points) to 52% when compared to the same period the previous year. The months of April, May and June (the height of the lockdown) saw the lowest levels of bedspace occupancy ranging from 15% to 16%. As in 2019, bed occupancy rates were at their highest in August, peaking at 36%, considerably lower than the same month in 2019 due to many businesses slowly reopening their businesses or not reopening at all.

England bed occupancy rates on a month by month basis saw levels increasing in only 2 months during the year when compared to 2019 with the pre-pandemic months of January and February increasing slightly by 1 and 2 percentage points respectively. Of the summer months, August recorded the highest bed occupancy rate at 35%, but much lower than would be expected at this time of year.

Overall, bed occupancy in Scotland during 2020 was lower in 11 out of 12 months with only January witnessing an increase of 7 percentage points when compared with the same month in 2019. April, May and June all recorded 0% occupancy rates during the lockdown period, with July bedspace occupancy only 7%, a downturn of 57 percentage points compared with July 2019.

Summary: Bedspace Occupancy

As with other nations in the UK, the impact of the COVID-19 pandemic can be seen across Wales during 2020. Due to a change in methodology during 2020 in Wales, the monthly data cannot be compared with previous years.

Northern Ireland bedspace occupancy levels were lower in every month in 2020 when compared with 2019. Due to the lockdown in place across Northern Ireland, occupancy figures were not available for 5 months of the year (March to June and November). Bedspace occupancy levels in August were recorded at 40%, the highest occupancy rate across the year but 19 percentage points lower when compared to August 2019.

Summary: Room and Bedspace occupancy in detail

The continuing effects of the lockdown and restrictions are again evident when looking at the annual weekday room occupancy levels in the UK which fell by 39 percentage points from 76% in 2019 to 37% in 2020. Bedspace occupancy followed a similar pattern with an average of 25% compared with 51% in 2019, a decrease of 26 percentage points. England mirrored that of the UK with decreases in both weekday room and bedspace occupancy of 38 and 26 percentage points each. Scotland witnessed the biggest fall in both measures of weekday occupancy, with room and bedspace occupancy down 43 and 34 percentage points respectively. As with England and Scotland, both room and bedspace occupancy levels during the weekday in Northern Ireland saw falls consistent with the other nations. Room fell by 40 percentage points and bedspace by 30 percentage points when compared with 2019. With a change in methodology during 2020 in Wales, comparisons to previous years cannot be made. However, both room and bedspace occupancy was on a par with England and the UK as a whole.

A similar pattern was seen in weekend room occupancy levels in the UK with a drop of 43 percentage points compared with the 2019 annual average (78%). Across the UK, weekend bedspace levels halved, down from 64% in 2019 to 31% in 2020. Both room and bedspace occupancy levels in England and Scotland were similar to that of the UK, with a fall of 43 and 34 percentage points respectively when compared to the previous year. The annual Wales room and bedspace occupancy levels were 34% and 27% in 2020. As with the other nations, Northern Ireland experienced a downturn in both room and bedspace occupancy rates during the weekend in 2020, by 40 and 30 percentage points respectively.

Summary: Room and Bedspace occupancy in detail

With the temporary closure of accommodation establishments during several months in 2020, both room and bedspace occupancy by establishment type in Scotland decreased across all three sectors with the guesthouse sector seeing the biggest decline, with room and bedspace occupancy down 44 and 40 percentage points when compared with 2019. A similar picture was witnessed in Northern Ireland with all sectors showing a downturn in both room and bed occupancy but more evident in hotels where room occupancy dropped from 67% in 2019 to 26% in 2020 and bedspace fell from 49% to 19% in 2020. During 2020, hotels in Wales fared better than both the guesthouse and B&B sectors.

Across the UK, city/large towns saw the greatest impact in both measures of room and bedspace occupancy during 2020, a reflection of the effects of the pandemic where people avoided cities and large towns and opted for more rural less busy areas. In city/large towns, room occupancy was down 40 percentage points compared with the previous year and bedspace fell by 29 percentage points year on year. Countryside/village, seaside and small town locations saw less of a downturn when compared with 2019.

Bedroom Occupancy: UK and National

UK and National: Annual Bedroom Occupancy 2016 - 2020

Table 1: UK and National Bedroom Occupancy, 2016-2020

	2016	2017	2018	2019	2020
England*	71	74	78	78	38
Scotland	64	64	67	67	21
Wales**	61	61	61	60	36
N. Ireland	61	63	61	59	19
UK	70	73	77	76	37

* England occupancy was calculated using a revised methodology from June 2017. Please see Methodological Note on slide 42 for further details.

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

UK: Monthly Bedroom Occupancy 2016 - 2020

Table 2: UK Bedroom Occupancy, 2016-2020

	UK				
	2016	2017	2018	2019	2020
Jan	54	54	63	63	63
Feb	63	61	71	70	70
Mar	64	64	73	73	37
Apr	69	69	75	75	20
May	71	73	78	78	21
Jun	77	80	82	80	22
Jul	81	83	85	84	27
Aug	79	81	83	82	48
Sep	80	83	83	82	47
Oct	74	78	81	80	40
Nov	68	75	76	76	28
Dec	61	68	69	68	26

National: Monthly Bedroom Occupancy 2016 - 2020

Table 2a: National Bedroom Occupancy, 2014-2020

	England						Scotland						Wales						Northern Ireland				
	2016	2017	2018	2019	2020		2016	2017	2018	2019	2020		2016	2017	2018	2019	2020		2016	2017	2018	2019	2020
Jan	55	56	65	65	65	Jan	45	42	51	44	50	Jan	43	43	47	45	61	Jan	33	48	46	52	40
Feb	64	63	74	73	73	Feb	53	42	51	52	38	Feb	51	53	51	49	71	Feb	51	48	54	53	45
Mar	65	66	75	75	37	Mar	55	51	62	64	32	Mar	55	55	53	50	40	Mar	53	54	58	52	26
Apr	70	70	77	76	22	Apr	60	62	60	67	0	Apr	58	64	59	60	20	Apr	59	62	59	52	*
May	72	73	79	79	23	May	69	74	77	78	1	May	61	65	66	66	29	May	66	68	69	63	*
Jun	77	80	82	80	24	Jun	76	79	81	80	1	Jun	67	69	71	70	31	Jun	72	74	73	70	*
Jul	81	84	86	85	29	Jul	79	82	82	80	12	Jul	73	74	71	74	26	Jul	76	72	69	72	21
Aug	79	81	83	82	47	Aug	83	87	87	85	49	Aug	77	75	74	75	68	Aug	79	79	73	75	44
Sep	81	84	84	83	46	Sep	78	80	80	79	50	Sep	72	71	68	70	60	Sep	72	74	69	64	38
Oct	75	80	83	82	41	Oct	67	66	68	66	34	Oct	63	63	57	61	26	Oct	62	64	62	56	28
Nov	70	78	79	79	28	Nov	56	53	55	56	23	Nov	55	57	56	53	37	Nov	57	57	52	50	*
Dec	63	71	72	71	27	Dec	48	48	48	51	17	Dec	51	47	53	50	25	Dec	51	51	48	45	22

UK: Annual and Seasonal Bedroom Occupancy Averages 2015 - 2019

Table 3: UK Bedroom Occupancy, 2015-2019

	UK				
	2016	2017	2018	2019	2020
Apr-Oct Average	76	78	81	80	32
Jul-Sep Average	80	83	84	83	40
Annual Average	70	73	77	76	37

National: Annual and Seasonal Bedroom Occupancy Averages 2016 - 2020

Table 3a: UK and National Bedroom Occupancy, 2016-2020

	England				Scotland				Wales				N. Ireland		
	Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave
2016	76	80	71	2016	73	80	64	2016	67	74	61	2016	69	76	61
2017	79	83	74	2017	76	83	64	2017	69	73	61	2017	70	75	63
2018	82	84	78	2018	76	83	67	2018	67	71	61	2018	68	70	61
2019	81	83	78	2019	76	81	67	2019	68	73	60	2019	64	70	59
2020	33	29	38	2020	14	20	21	2020	29	33	36	2020	13	21	19

UK: Annual Bedroom Occupancy Trends 2016 - 2021

Table 4: UK Annual Bedroom Occupancy Trends, 2016-2020

	UK		
	16-18	17-19	18-20
Jan	57	60	63
Feb	65	68	71
Mar	67	70	61
Apr	71	73	56
May	74	76	59
Jun	79	80	61
Jul	83	84	65
Aug	81	82	71
Sep	82	83	71
Oct	78	80	67
Nov	73	76	60
Dec	66	69	55

National: Annual Bedroom Occupancy Trends 2016 - 2020

Table 4a: National Bedroom Occupancy Trends, 2016-2020

	England		
	16-18	17-19	18-20
Jan	59	62	65
Feb	67	70	73
Mar	69	72	62
Apr	72	74	58
May	75	77	60
Jun	80	81	62
Jul	84	85	67
Aug	81	82	71
Sep	83	84	71
Oct	79	82	69
Nov	76	79	62
Dec	69	71	57

	Scotland		
	16-18	17-19	18-20
Jan	46	46	48
Feb	49	48	47
Mar	56	59	53
Apr	61	63	42
May	73	76	52
Jun	79	80	54
Jul	81	81	58
Aug	85	86	73
Sep	80	80	70
Oct	67	67	56
Nov	55	55	45
Dec	48	49	39

	Wales		
	16-18	17-19	18-20
Jan	44	46	52
Feb	52	52	58
Mar	54	53	48
Apr	60	61	46
May	64	65	53
Jun	69	70	57
Jul	73	73	57
Aug	75	75	72
Sep	70	70	66
Oct	61	60	48
Nov	56	55	48
Dec	50	50	42

	N. Ireland		
	16-18	17-19	18-20
Jan	43	49	46
Feb	51	51	50
Mar	55	54	45
Apr	60	58	37
May	67	67	44
Jun	73	73	48
Jul	72	71	54
Aug	77	76	64
Sep	72	69	57
Oct	63	60	48
Nov	55	53	34
Dec	50	48	38

UK: Annual Bedroom Occupancy Trends - Averages 2016 - 2020

Table 5: UK Bedroom Occupancy Trends, Averages 2016-2020

	UK		
	2016-18	2017-19	2018-20
Apr-Oct Average	78	80	64
Jul-Sep Average	82	83	69
Annual Average	73	75	63

National: Annual Bedroom Occupancy Trends - Averages 2016 - 2020

Table 5a: UK and National Bedroom Occupancy, Trends 2016-2020

	England				Scotland				Wales				N. Ireland		
	16-18	17-19	18-20		16-18	17-19	18-20		16-18	17-19	18-20		16-18	17-19	18-20
Apr-Oct Average	79	81	65	Apr-Oct Average	75	76	58	Apr-Oct Average	68	68	54	Apr-Oct Average	69	67	45
Jul-Sep Average	83	84	66	Jul-Sep Average	80	81	67	Jul-Sep Average	73	72	59	Jul-Sep Average	74	72	58
Annual Average	74	77	65	Annual Average	70	71	53	Annual Average	61	61	52	Annual Average	62	61	47

Bedspace Occupancy: UK and National

UK and National: Annual Bedspace Occupancy 2016 - 2020

Table1: UK and National Bedspace Occupancy, 2016-2020

	2016	2017	2018	2019	2020
England*	52	53	55	55	27
Scotland	49	52	52	51	14
Wales**	47	48	47	46	25
N.Ireland	47	48	46	43	15
UK	52	52	55	55	26

* England occupancy was calculated using a revised methodology from June 2017. Please see Methodological Note on slide 42 for further details.

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

UK: Monthly Bedspace Occupancy 2016 - 2020

Table 7: UK Bedspace Occupancy, 2016-2020

	UK				
	2016	2017	2018	2019	2020
Jan	37	39	44	45	45
Feb	45	44	50	50	52
Mar	46	46	52	51	25
Apr	50	53	54	55	15
May	53	54	57	57	16
Jun	56	57	58	58	15
Jul	61	61	60	60	20
Aug	62	61	63	63	36
Sep	59	58	58	57	32
Oct	53	55	57	57	27
Nov	48	51	53	53	19
Dec	46	50	50	50	18

National: Monthly Bedspace Occupancy 2016 - 2020

Table 7a: National Bedspace Occupancy, 2016-2020

	England						Scotland						Wales						Northern Ireland				
	2016	2017	2018	2019	2020		2016	2017	2018	2019	2020		2016	2017	2018	2019	2020		2016	2017	2018	2019	2020
Jan	38	39	45	45	46	Jan	30	42	40	28	35	Jan	32	32	34	33	42	Jan	24	35	32	38	29
Feb	46	45	52	52	54	Feb	37	31	40	30	29	Feb	39	40	39	38	50	Feb	39	35	38	39	35
Mar	47	47	53	52	25	Mar	40	34	49	47	29	Mar	41	41	40	38	26	Mar	40	40	42	36	*
Apr	51	53	55	56	16	Apr	44	52	45	50	0	Apr	46	52	46	46	13	Apr	46	49	42	36	*
May	53	54	57	57	17	May	54	57	61	59	0	May	47	50	51	51	20	May	51	51	51	46	*
Jun	56	56	58	58	16	Jun	60	65	63	58	0	Jun	51	53	55	53	19	Jun	52	56	55	55	*
Jul	61	60	60	60	21	Jul	66	71	68	64	7	Jul	58	59	56	56	18	Jul	63	60	55	54	19
Aug	61	60	62	63	35	Aug	69	73	72	70	39	Aug	63	61	61	60	50	Aug	65	65	61	59	40
Sep	59	57	58	57	31	Sep	60	64	63	61	37	Sep	56	55	53	53	41	Sep	54	56	50	42	32
Oct	54	56	58	58	29	Oct	51	52	50	58	9	Oct	48	48	43	45	17	Oct	47	48	42	39	21
Nov	49	53	55	55	19	Nov	39	37	38	41	15	Nov	40	42	41	42	25	Nov	44	40	38	35	*
Dec	47	52	52	51	19	Dec	37	40	36	40	9	Dec	40	37	41	39	17	Dec	39	40	39	32	17

UK: Annual and Seasonal Bedspace Occupancy Averages 2016 - 2020

Table 8: UK: Bedspace Occupancy Averages, 2016-2020

	UK				
	2016	2017	2018	2019	2020
Apr-Oct Average	56	57	58	58	23
Jul-Sep Average	61	60	61	60	29
Annual Average	52	52	55	55	26

National: Annual and Seasonal Bedspace Occupancy Averages 2016 - 2020

Table 8a: National Bedspace Occupancy Averages, 2016-2020

	England				Scotland				Wales				N. Ireland		
	Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave		Apr-Oct Ave	Jul-Sep Ave	Ann Ave
2016	56	60	52	2016	58	65	49	2016	53	59	47	2016	54	61	47
2017	57	59	53	2017	62	69	52	2017	54	58	48	2017	55	60	48
2018	58	60	55	2018	60	68	52	2018	52	57	47	2018	51	56	46
2019	58	60	55	2019	60	65	51	2019	52	56	46	2019	48	52	43
2020	24	21	27	2020	8	16	14	2020	20	22	25	2020	11	19	15

UK : Annual Bedspace Occupancy Trends 2016 - 2020

Table 9: UK Annual Bedspace Occupancy, 3 Year Trends, 2016-2020

	UK		
	16-18	17-19	18-20
Jan	40	42	50
Feb	46	48	57
Mar	48	50	47
Apr	52	54	43
May	55	56	45
Jun	57	58	46
Jul	61	61	49
Aug	62	63	58
Sep	58	58	54
Oct	55	56	51
Nov	51	52	45
Dec	49	50	42

National: Annual Bedspace Occupancy Trends 2016 - 2020

Table 9a: National Bedspace Occupancy, 3 Year Trends, 2016-2020

	England		
	16-18	17-19	18-20
Jan	41	43	45
Feb	48	50	53
Mar	49	51	43
Apr	53	55	42
May	55	56	44
Jun	57	57	44
Jul	60	60	47
Aug	61	62	53
Sep	58	57	49
Oct	56	57	48
Nov	52	54	43
Dec	50	52	41

	Scotland		
	16-18	17-19	18-20
Jan	37	37	34
Feb	36	34	33
Mar	41	43	41
Apr	47	49	32
May	57	59	40
Jun	63	62	40
Jul	68	67	46
Aug	71	72	60
Sep	62	63	54
Oct	51	53	39
Nov	38	38	31
Dec	38	39	28

	Wales		
	16-18	17-19	18-20
Jan	33	33	36
Feb	39	39	42
Mar	41	40	35
Apr	48	48	35
May	49	51	41
Jun	53	54	42
Jul	58	57	43
Aug	62	61	57
Sep	55	54	49
Oct	46	45	35
Nov	41	42	36
Dec	39	39	32

	N. Ireland		
	16-18	17-19	18-20
Jan	30	35	33
Feb	37	38	38
Mar	41	39	33
Apr	46	43	26
May	51	49	33
Jun	55	55	37
Jul	59	56	43
Aug	64	62	53
Sep	53	49	41
Oct	46	43	34
Nov	41	38	24
Dec	40	37	29

UK: Annual Bedspace Occupancy Trends - Averages 2016 - 2020

Table 10: UK Bedspace Occupancy Averages, 2016-2020

	UK		
	16-18	17-19	18-20
Apr-Oct Average	57	58	49
Jul-Sep Average	60	60	54
Annual Average	53	54	48

National: Annual Bedspace Occupancy Trends - Averages 2016 - 2020

Table 10a: National Bedspace Occupancy Trends, Averages, 2016-2020

	England				Scotland				Wales				N. Ireland		
	16-18	17-19	18-20		16-18	17-19	18-20		16-18	17-19	18-20		16-18	17-19	18-20
Apr-Oct Average	57	58	47	Apr-Oct Average	60	61	44	Apr-Oct Average	53	53	41	Apr-Oct Average	53	51	38
Jul-Sep Average	60	60	47	Jul-Sep Average	67	67	52	Jul-Sep Average	58	57	45	Jul-Sep Average	59	56	46
Annual Average	53	54	46	Annual Average	51	51	40	Annual Average	47	47	39	Annual Average	47	45	35

Occupancy in detail: UK and National

UK and National: Annual Weekday Occupancy 2016 - 2020

Fig 1: UK and National, Annual Weekday Bedroom Occupancy, 2016 – 2020

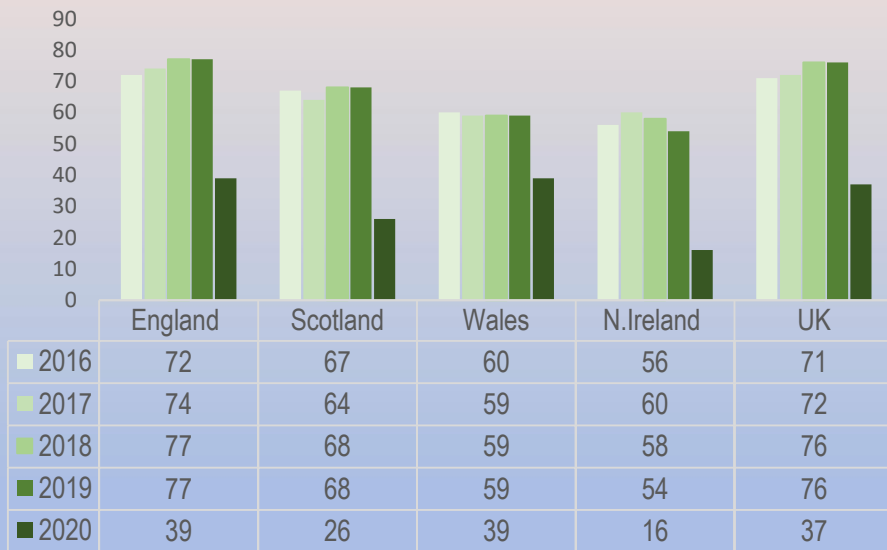
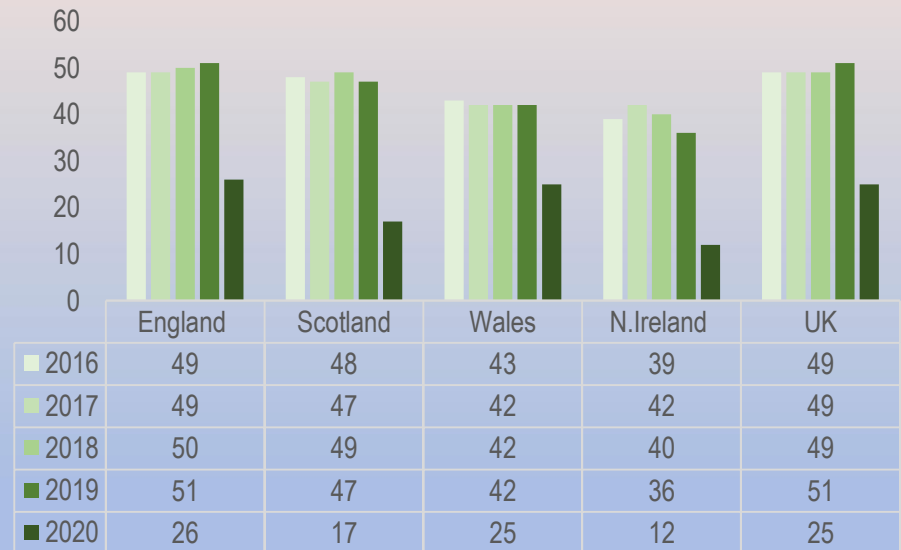


Fig 2: UK and National, Annual Weekday Bedspace Occupancy, 2016 – 2020



UK and National: Annual Weekend Occupancy 2016 - 2020

Fig 3: UK and National, Annual Weekend
Bedroom Occupancy, 2016 – 2020

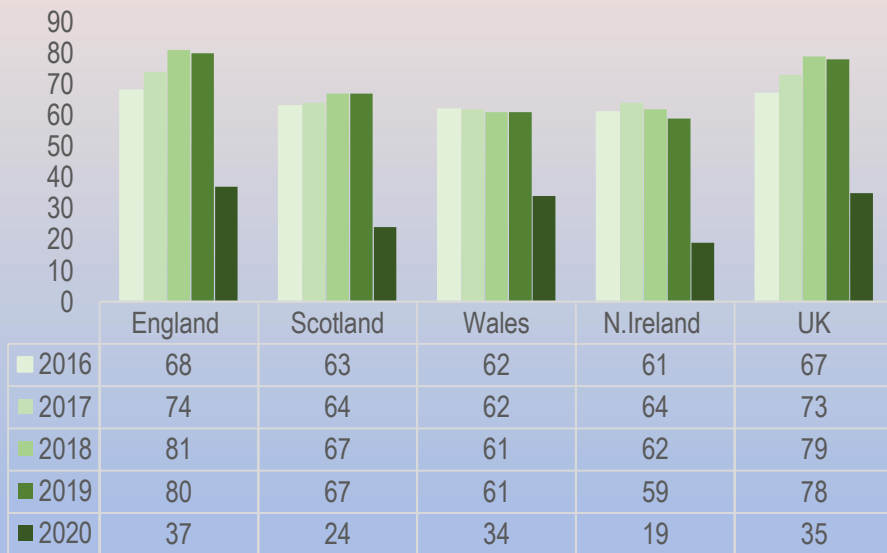
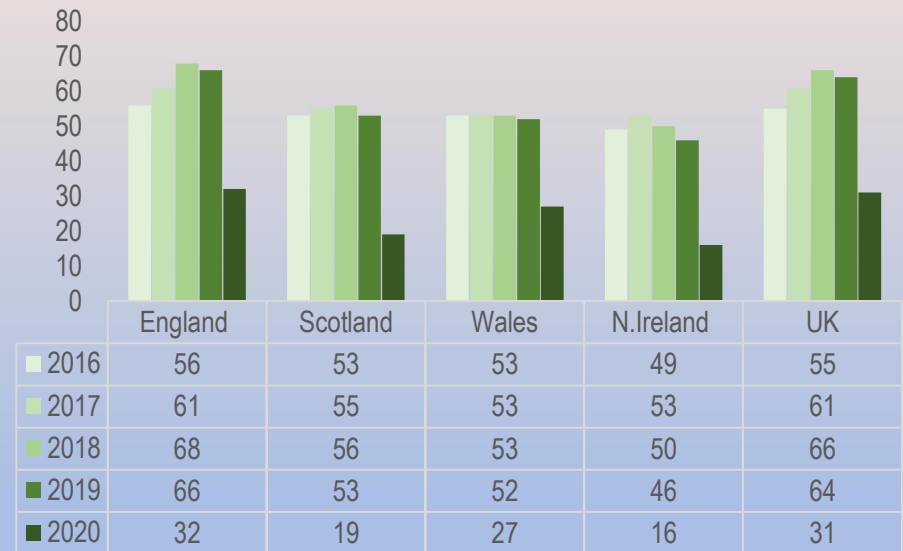


Fig 4: UK and National, Annual Weekend
Bedspace Occupancy, 2016 – 2020



National Occupancy: Type of Establishment 2019-2020

Fig 5: National Annual Bedroom Occupancy, 2019 and 2020, by Type of Establishment

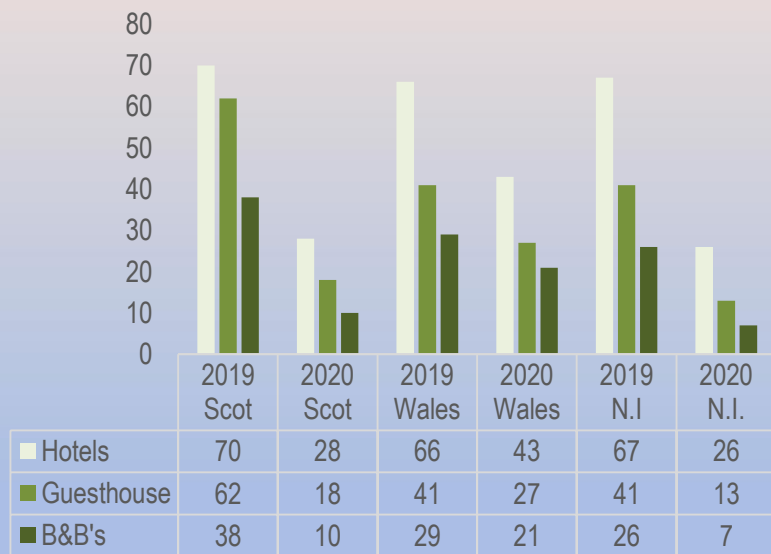
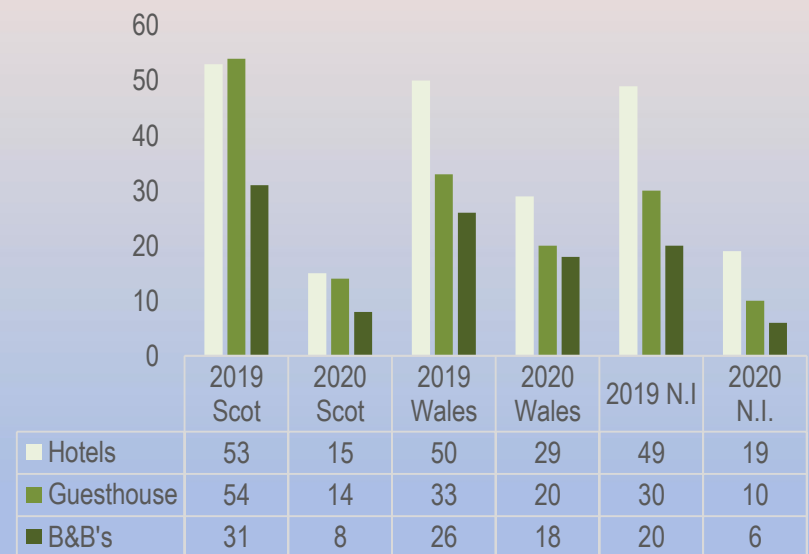


Fig 6: National Annual Bedspace Occupancy, 2019 and 2020, by Type of Establishment



Due to a change in the methodology and collection of data for England from June 2017 onwards, comparable figures for England cannot be shown.

UK: Annual Occupancy by Location of Establishment 2016 - 2020

Fig 7: UK Annual Bedroom Occupancy, by Location of Establishment, 2016 – 2020

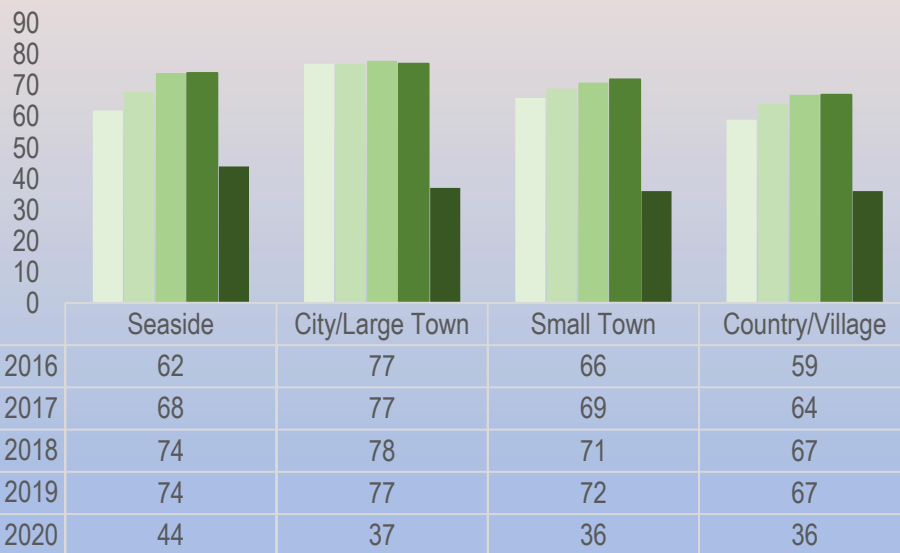
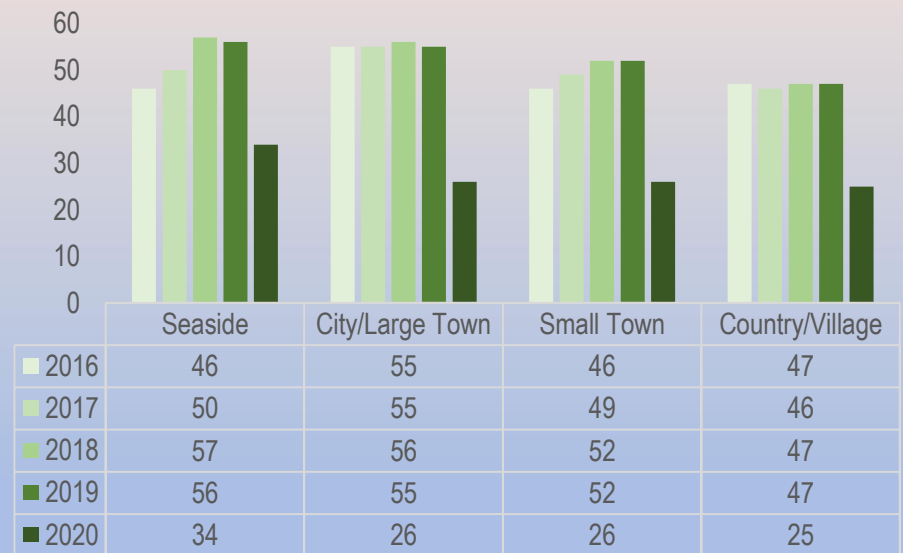


Fig 8: UK Annual Bedspace Occupancy, by Location of Establishment, 2016 – 2020



Background and methodology

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

Background

This document summarises the main trends from the surveys carried out in England, Scotland, Wales and Northern Ireland which have been aggregated to provide occupancy figures for the UK as a whole.

The individual surveys are conducted according to a common specification to ensure the production of comparable data for the whole of the UK.

The survey includes hotels (including motels, lodges and inns), guesthouses and private houses offering bed and breakfast to tourists (including farmhouses). It should be noted that only in Northern Ireland, where compulsory registration of tourist accommodation ensures an accurate stock record, is there a definition of the various types of accommodation. In England, Scotland and Wales the type is defined by each accommodation establishment itself in answering a questionnaire and therefore, because the criteria are not objectively defined, the distinction between types is not always clear and may vary slightly.

In 2019 there were about 39,000 establishments of this type in the UK which were known to the tourist boards, with a total of almost 2 million bedspaces available daily.

Methodological Details

Figure 7: Distribution of total known accommodation stock 2020 by Number of establishments

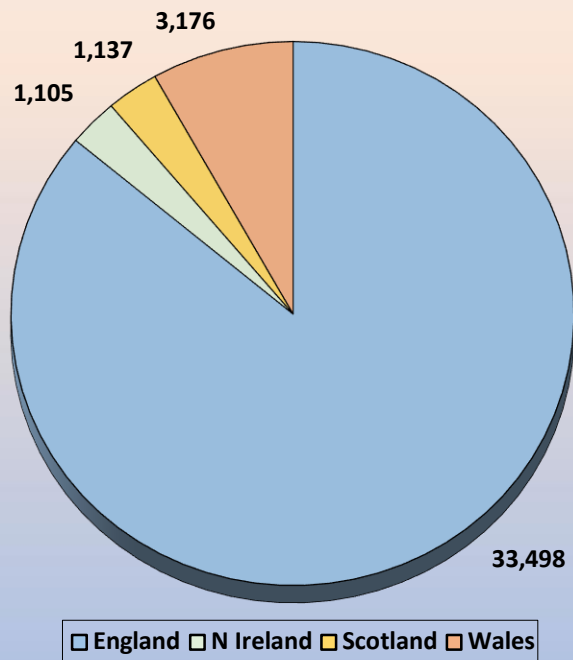
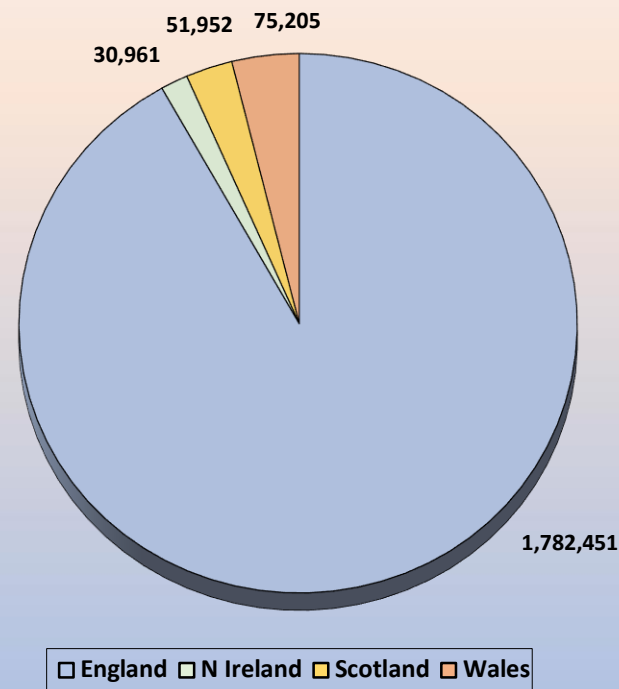


Figure 8: Distribution of total known accommodation stock 2020 by Number of bedspaces



Each month between *782 and 3,891 returned data and the occupancy rates in the report are calculated from these monthly samples. *The sample size for England increased from June 2017 onwards with a change in methodology and the inclusion of additional STR data.*

The occupancy figures in this summary are calculated on the accommodation available each month - i.e. only open accommodation is included. In calculating figures for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area that month.

* Sample lower than previous years due to the temporary closure of accommodation businesses during the COVID-19 Pandemic

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 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.