



UNITED KINGDOM OCCUPANCY SURVEY

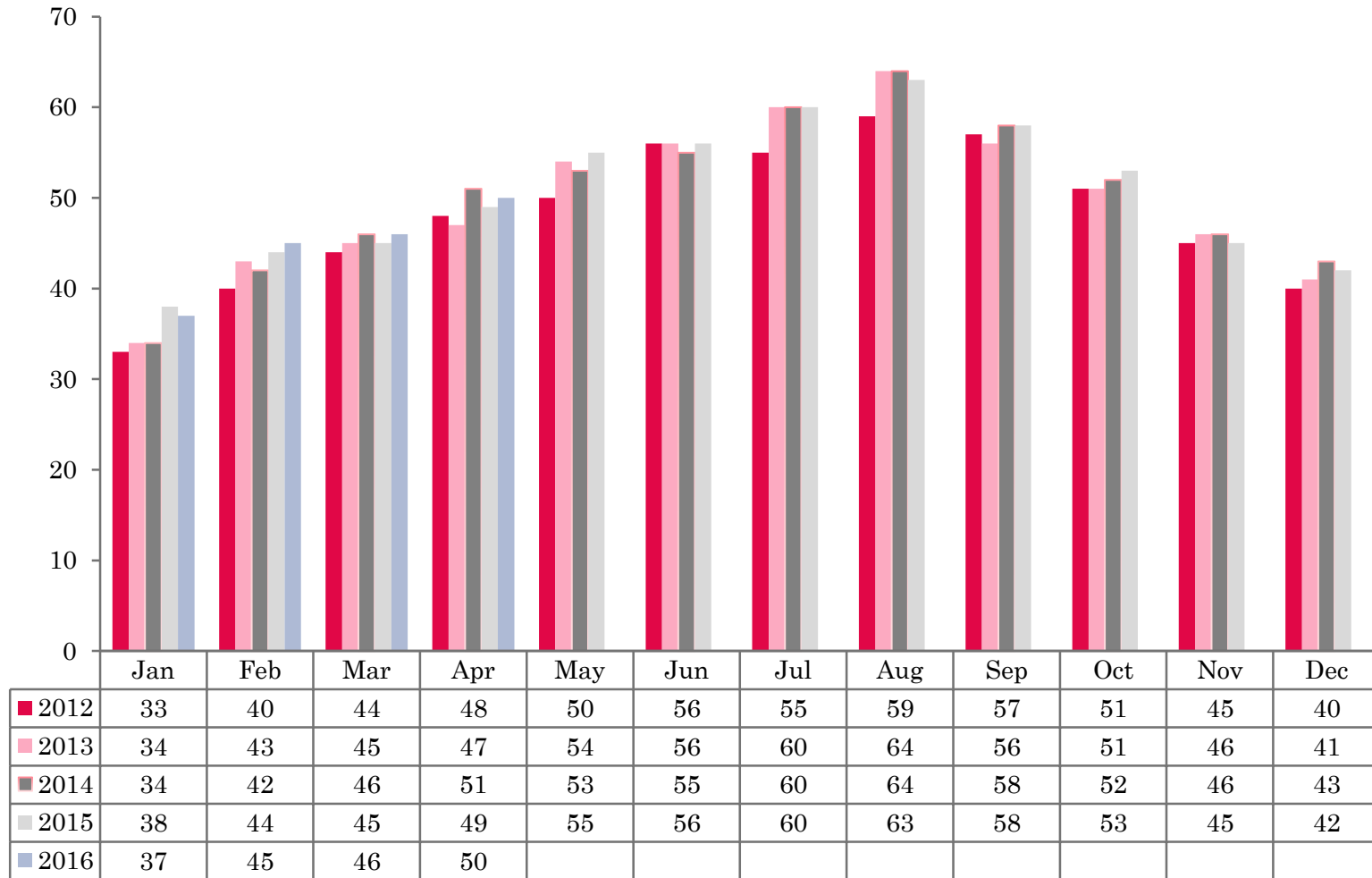
Serviced Accommodation Summary Report
April 2016

UK OCCUPANCY SURVEY

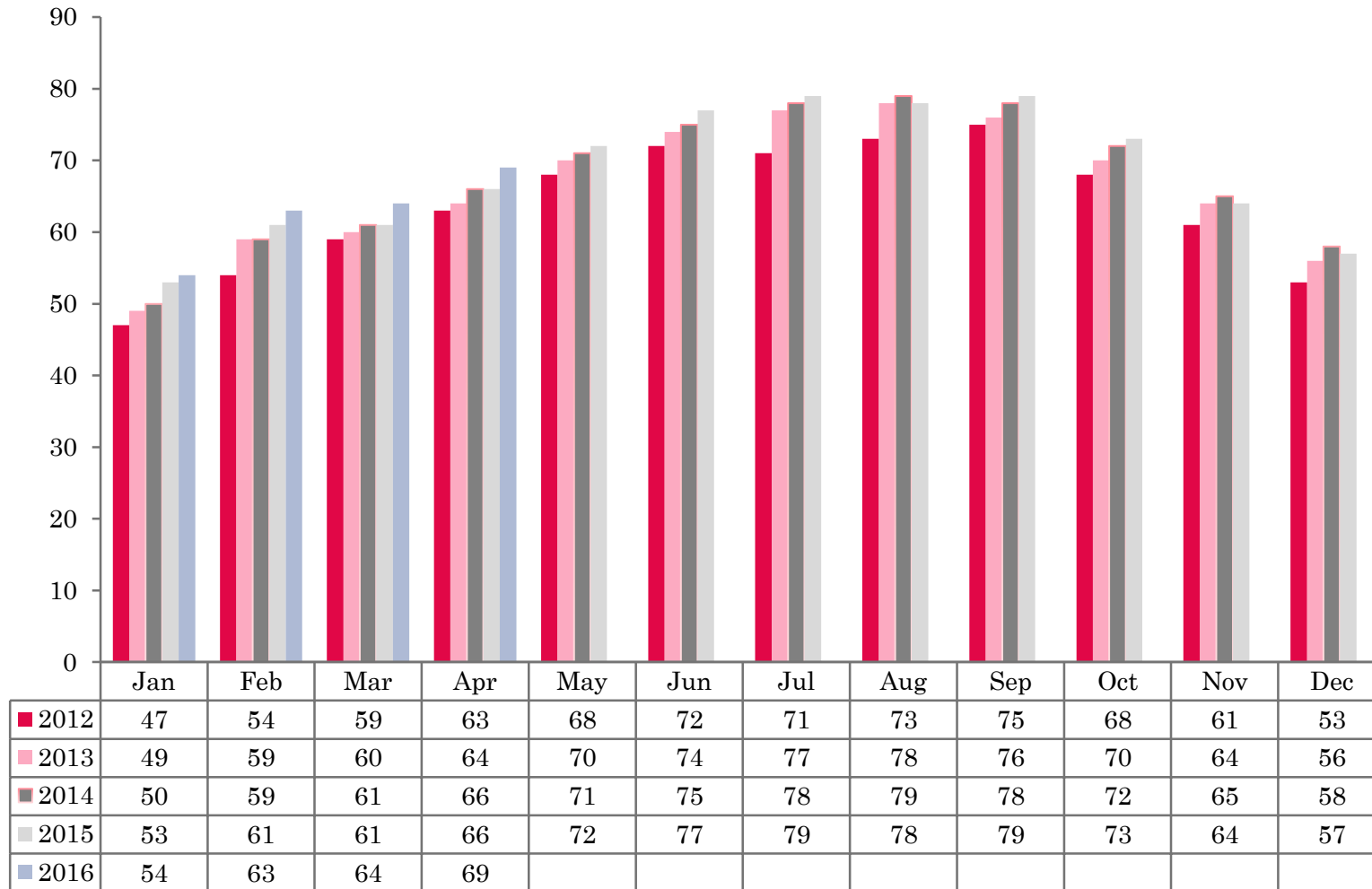
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



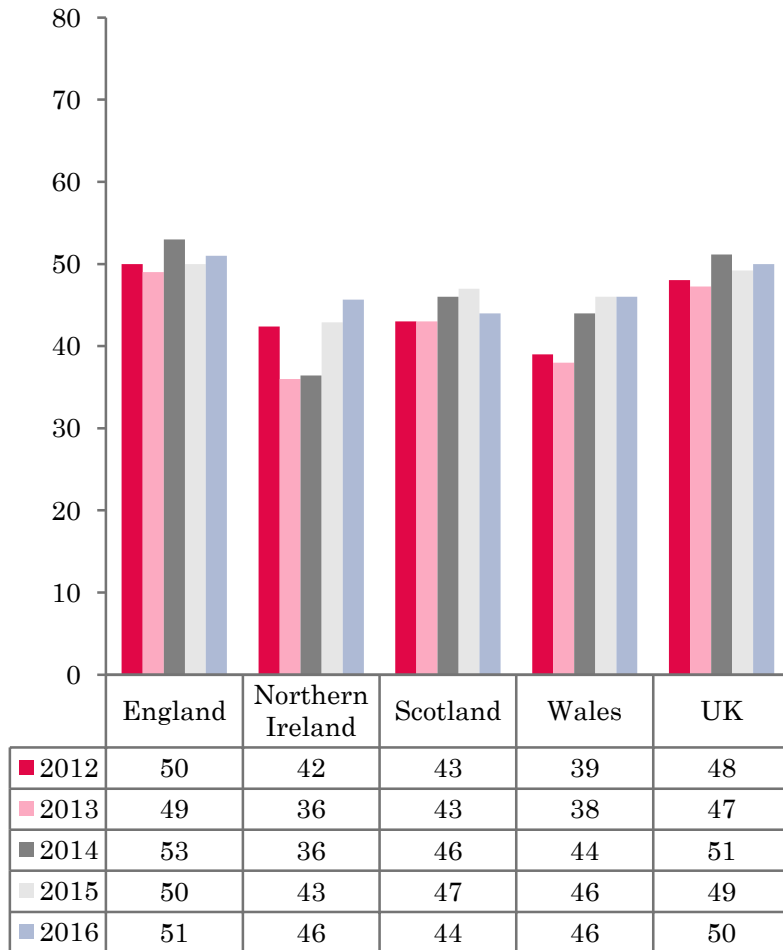
UK BEDROOM OCCUPANCY 2012 - 2016



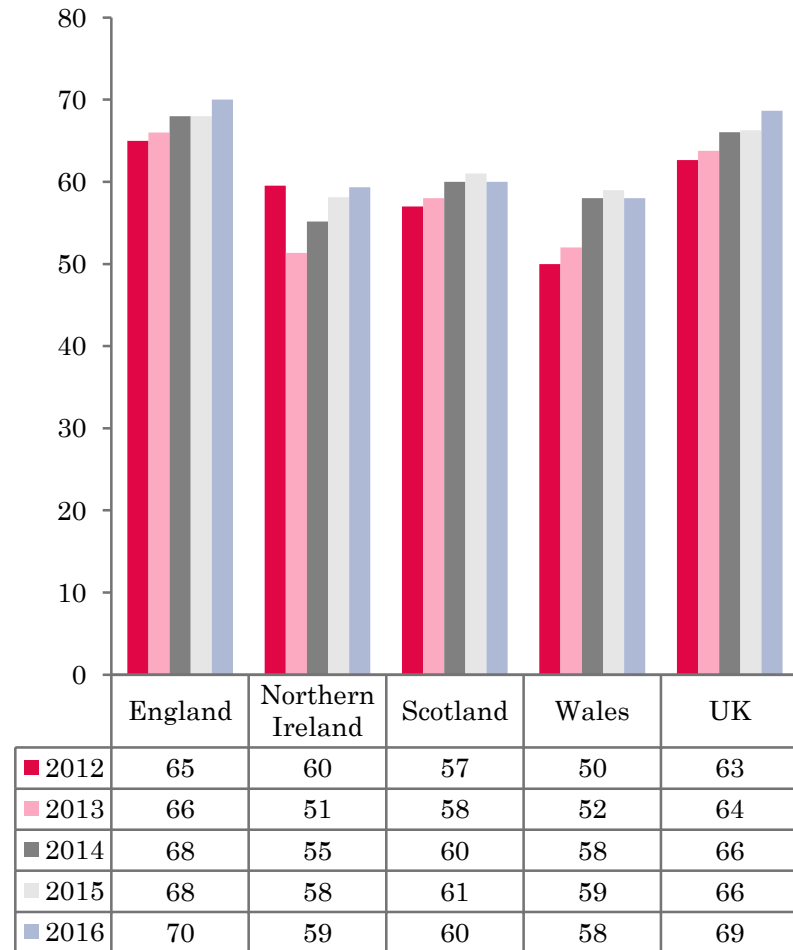
- ❖ 2,452 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace occupancy levels (50%) had remained flat (+1%) when compared to the same period the previous year. UK room occupancy had increased by 3%, up to 69% when compared to April 2015.



NATIONAL BEDSPACE OCCUPANCY APRIL 2012-2016



NATIONAL ROOM OCCUPANCY APRIL 2012-2016



- UK bedspace occupancy during April 2016 remained flat (+1%) when compared with the same month in 2015. Room occupancy increased by 3%, up from 66% in April 2015 to 69% in 2016.
- Bedspace occupancy levels in England remained flat during April 2016. Room occupancy had increased by 2%, up to 70% compared with 68% in April 2015.
- Room occupancy levels in Northern Ireland remained flat (+1%) during April 2016, whilst bed occupancy increased by 3% when compared to the same period in 2015.
- Wales saw no change in both measures of occupancy during April, with both room and bedspace occupancy remaining flat compared to the same period in 2015.
- Bedspace occupancy levels across Scotland fell during April 2016, down from 47% in 2015 to 44% this year. Room occupancy remained flat (-1%) during this period.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained flat when compared with the previous year. England mirrored the UK. Wales remained on a par with April 2015, whilst Northern Ireland increased by 2%. (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) Slide 19).



Table 1: Occupancy Levels: April 2014 - 2016

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	53	50	51	68	68	70	1937	1882	1810
Northern Ireland	36	43	46	55	58	59	168	197	172
Scotland	46	47	44	60	61	60	297	292	261
Wales	44	46	46	58	59	58	116	211	209
UK	51	49	50	66	66	69	2518	2582	2452

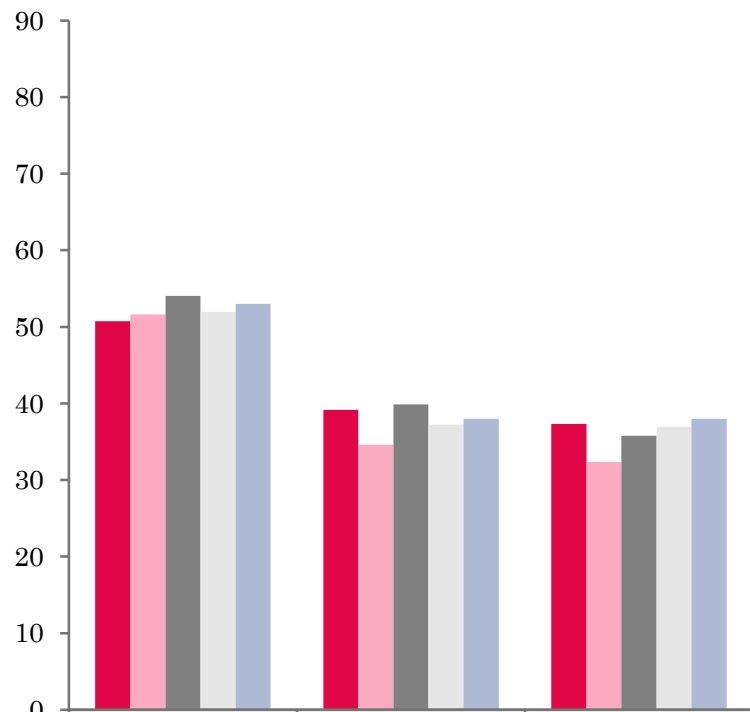
Table 2: UK/Non UK Occupancy Levels April 2014 – 2016 (see note 5a and 5b Slide 19)

	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	37	40	38	4	3	4	8	7	7	10	8	9	1937	1882	1810
Northern Ireland	19	19	19	18	24	26	43	37	37	49	56	58	168	197	172
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	297	292	261
Wales	37	39	37	4	2	2	**	**	**	9	4	6	116	211	209
UK	37	39	38	4	3	4	9	8	7	11	9	10	2518	2582	2452

** FIGURES NOT AVAILABLE

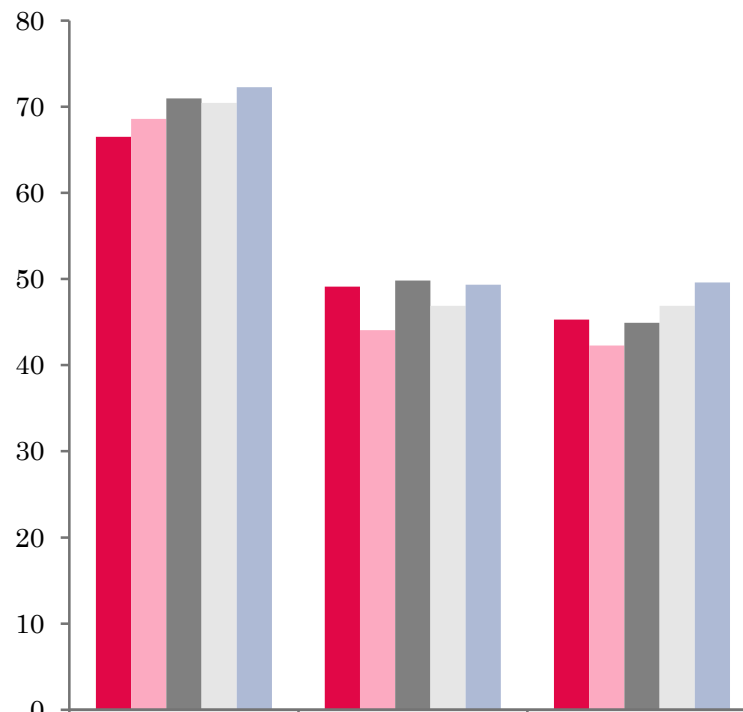


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2012-2016



	Hotels	Guesthouses	B&Bs
2012	51	39	37
2013	52	35	32
2014	54	40	36
2015	52	37	37
2016	53	38	38

UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2012-2016



	Hotels	Guesthouses	B&Bs
2012	67	49	45
2013	69	44	42
2014	71	50	45
2015	70	47	47
2016	72	49	50



- Bed occupancy levels across all types of establishment remained flat when compared to April 2015. Room occupancy levels fared better, with a 2% increase in both hotel and guesthouse occupancy, with room occupancy levels also doing well this month in the B&B sector, up by 3% when compared to the same period last year.
- At the UK level, bed occupancy levels increased in the >100 size banding, up 2% on April 2015. Bed occupancy in three out of the six size bands had fallen when compared to the same month in 2015, with the other two remaining flat. Room occupancy levels had increased in the 11-25 and 26-50 size banding, up by 3% and 4% respectively. A small drop in room occupancy levels was found in the 51-100 size banding, where occupancy was down by 2% when compared to April 2015. All other size bandings remained flat during April 2016.
- Bedspace occupancy remained flat in both the city/large town and countryside/village location types compared with the same month in 2015. Small town's bed occupancy levels increased by 2% compared to April 2015. Only seaside locations remained flat in room occupancy during April, with all other location types increasing in room occupancy levels. Both city/large town and countryside/village locations increased by 3% when compared to the same period the previous year. Small town locations fared even better, up 4% to 65% this month compared to April 2015.
- Both the £20.00-£29.99 and £30.00-£39.99 tariff bands remained flat in bed occupancy during April 2016, with all other tariff bands witnessing a fall in bed occupancy. The largest of these was in the >£60.00 category where a 4% decrease was found. All other tariff bands remained flat in April when compared to the same period the previous year. Room occupancy levels in the £20.00-£29.99 and >£60.00 tariff bands increased by 5% and 2% respectively, with both the £30.00-£39.99 and £50.00-£59.99 tariff bands decreasing by 2% and the £40.00-£49.99 tariff band remaining flat when compared to April 2015.



Table 3: Occupancy Levels by Type of Establishment: April 2014 – 2016

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	55	52	53	72	71	73	1471	1465	1460
Northern Ireland	46	53	53	66	70	68	71	80	80
Scotland	52	52	49	68	69	68	209	210	198
Wales	49	51	49	66	66	64	65	167	165
UK	54	52	53	71	70	72	1816	1922	1903
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	42	39	39	53	50	51	184	165	131
Northern Ireland	30	24	26	37	39	38	19	18	20
Scotland	35	32	32	41	35	37	40	35	29
Wales	26	31	35	33	37	40	20	21	21
UK	40	37	38	50	47	49	263	239	201
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	38	39	40	48	50	52	282	252	219
Northern Ireland	11	13	24	16	17	32	78	99	72
Scotland	30	34	24	37	41	35	48	47	34
Wales	29	24	25	33	29	28	31	23	23
UK	36	37	38	45	47	50	439	421	348



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: April 2014 – 2016 (see notes 5a & 5b Slide 19)

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	56	54	54	50	47	42	67	65	66	69	68	73
Northern Ireland	46	47	46	35	35	34	61	60	57	56	52	52
Scotland	0	53	53	0	44	48	0	63	64	0	62	72
Wales	50	55	52	37	40	40	63	64	60	54	56	57
UK	55	54	54	49	46	42	67	65	66	68	66	72



Table 35: Non-UK Percentages: April 2014 – 2016 (see notes 5a & 5b Slide 19)

	Percentage of Non-UK Guests %						4Percentage of Non-UK Bednights 3%					
	Weekend			Weekday			Weekend			Weekday		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	6	5	6	10	9	9	8	6	8	12	9	10
Northern Ireland	42	36	34	43	41	43	46	42	46	47	45	53
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	9	3	5	10	4	7
UK	7	6	6	11	10	9	9	7	8	13	10	10

**** FIGURES NOT AVAILABLE**



Table 6: Occupancy Levels by Size: April 2014 - 2016

A: Percentage of Bedspace Occupancy												
	1 - 3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	34	34	33	146	37	38	36	197	46	44	44	83
Northern Ireland	10	9	17	58	21	16	33	23	31	33	30	34
Scotland	25	24	22	31	37	41	36	44	49	50	45	42
Wales	28	25	27	20	34	36	35	32	45	47	43	23
UK	32	32	32	255	36	38	36	296	46	45	44	182

Table6: Occupancy Levels by Size: April 2014 - 2016

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	53	52	49	50	56	51	46	28	57	54	56	1306
Northern Ireland	40	43	49	21	47	51	48	23	47	60	60	13
Scotland	48	53	47	47	56	53	54	40	59	55	54	57
Wales	49	50	44	15	69	64	62	10	42	53	54	109
UK	52	52	49	133	56	52	47	101	56	54	56	1485



Table 7: Occupancy Levels by Size: April 2014 – 2016

B:Percentage of Bedroom Occupancy												
	1 -3 Rooms				4 – 10 Rooms				11 – 25 Rooms			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	41	44	41	146	47	49	50	197	61	56	59	83
Northern Ireland	14	13	24	58	19	20	40	23	43	44	44	34
Scotland	32	30	31	31	43	46	43	44	60	61	58	42
Wales	34	29	29	20	41	43	41	32	57	53	52	23
UK	39	41	40	375	46	48	49	296	60	56	59	182

Table 7: Occupancy Levels by Size: April 2014 - 2016

B (cont): Percentage of Bedroom Occupancy												
	26 – 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	68	62	67	50	65	69	68	28	78	77	78	1306
Northern Ireland	61	60	59	21	64	68	65	23	73	79	77	13
Scotland	63	68	66	47	74	71	73	40	79	78	76	57
Wales	63	65	57	15	72	74	70	10	75	77	77	109
UK	67	63	67	133	67	70	68	101	78	77	78	1485



Table 8: Occupancy Levels by Location Type: April 2014 - 2016

A: Percentage Bedspace Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	47	44	42	166	59	56	55	1019	47	45	47	353	44	44	45	272
Northern Ireland	34	32	37	46	45	56	54	57	26	24	30	46	18	17	22	23
Scotland	43	49	44	31	0	53	52	116	0	40	35	53	0	42	37	61
Wales	52	51	48	28	42	42	42	9	52	41	42	14	36	37	36	52
UK	46	45	42	271	58	55	54	1201	47	44	46	466	43	43	44	408

Table 8: Occupancy Levels by Location Type: April 2014 - 2016

B:Percentage Bedroom Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	58	61	60	166	78	76	77	1019	64	63	67	353	58	57	59	272
Northern Ireland	42	41	46	46	67	74	70	57	38	35	39	46	34	21	36	23
Scotland	61	62	57	31	0	73	72	116	0	54	52	53	0	49	48	61
Wales	60	59	54	28	73	54	60	9	55	54	55	14	47	45	46	52
UK	58	61	59	271	77	74	76	1201	63	61	65	466	57	54	57	408

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2014 – 2016 (see note 5a Slide 19)

A: Percentage of Bedspace Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	**	**	**	**	27	28	27	22	30	30	27	70
Northern Ireland	**	**	**	**	4	9	16	10	15	19	25	44
Scotland	**	**	**	**	42	26	****	3	54	28	22	36
Wales	**	**	**	**	9	11	17	4	26	27	29	19
UK	**	**	**	**	28	26	27	39	33	29	27	169

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2014 – 2016 (see note 5a Slide 19)

B: Percentage of Bedspace Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	42	42	40	100	47	45	43	65	55	52	53	1553
Northern Ireland	30	30	36	34	44	49	33	11	43	54	53	76
Scotland	39	36	33	35	42	50	50	26	51	53	52	159
Wales	39	34	40	16	65	44	40	14	48	52	51	156
UK	41	40	39	185	47	46	43	116	54	52	53	1944

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2014 – 2016 (see note 5a Slide 19)

A: Percentage of Bedroom Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	**	**	**	**	37	40	42	22	40	38	35	70
Northern Ireland	**	**	**	**	6	10	23	10	18	24	32	44
Scotland	**	**	**	**	50	24	****	3	73	35	32	36
Wales	**	**	**	**	12	17	26	4	32	33	36	19
UK	**	**	**	**	37	36	41	39	44	37	35	169

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2014 – 2016 (see note 5a Slide 19)

B: Percentage of Bedroom Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	53	54	52	100	56	58	56	65	72	71	73	1553
Northern Ireland	43	46	51	34	64	67	49	11	65	71	67	76
Scotland	55	49	47	35	49	67	70	26	60	69	69	159
Wales	56	43	55	16	62	57	52	14	67	66	64	156
UK	53	53	52	185	55	59	57	116	70	70	72	1944

** FIGURES NOT AVAILABLE

Notes

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 2015 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) the figures in Tables 2, 4, 8 and 9 may be based on a subset of the sample for all guests. This is because separate UK and non-UK data is not known for all establishments in the sample (Tables 2, 4 and 5), not all establishments provide daily data (Tables 4 and 5) and not all establishments give tariff details (Tables 9 and 10); and
 - (b) because of changes in the data collected, it is no longer possible to provide UK/non UK figures for Scotland or figures relating to arrivals for Wales (Tables 2 and 5).
 - (c) 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.



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 2015) 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)

