



# UNITED KINGDOM OCCUPANCY SURVEY

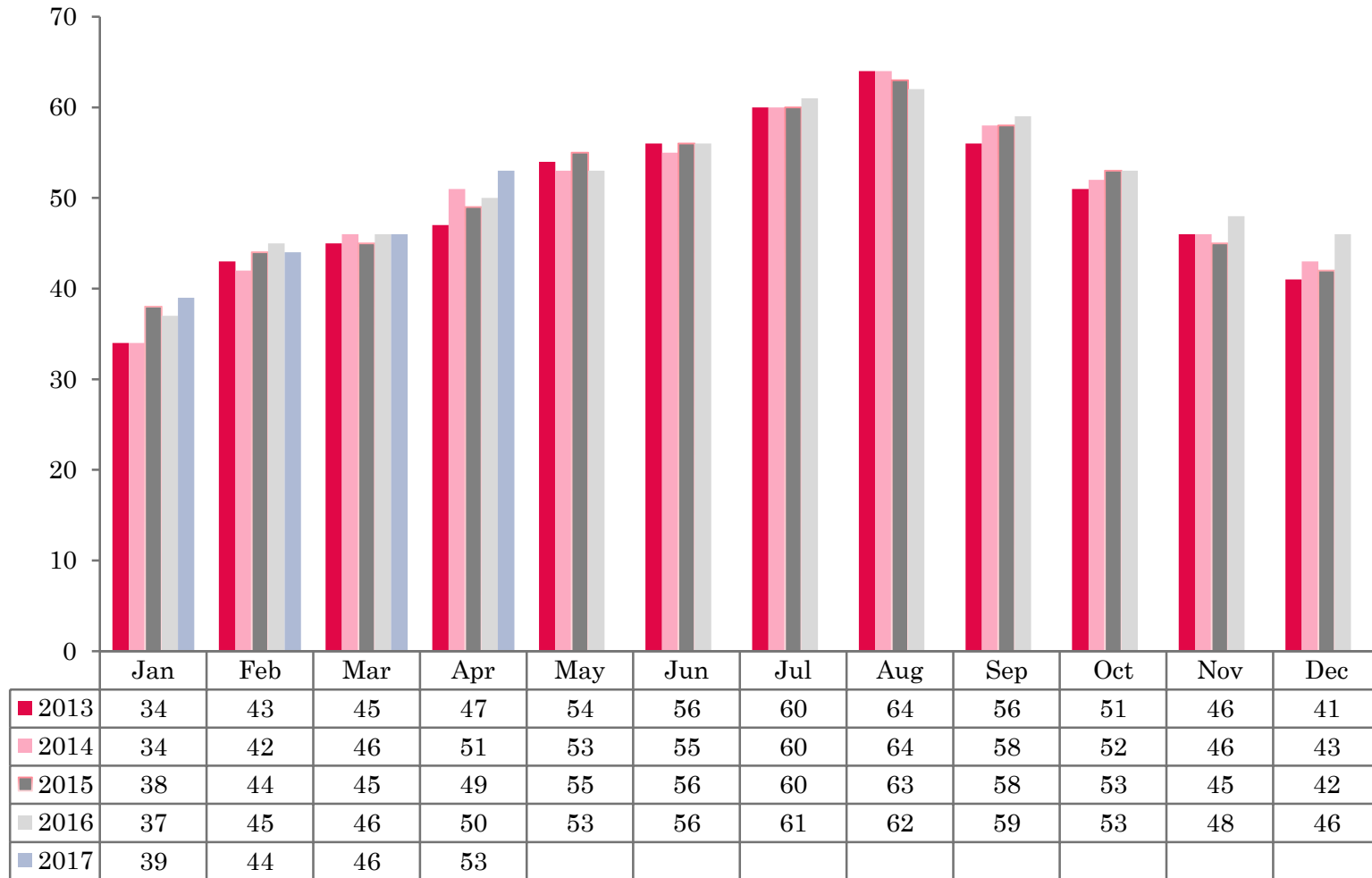
Serviced Accommodation  
Summary Report April 2017

# UK OCCUPANCY SURVEY

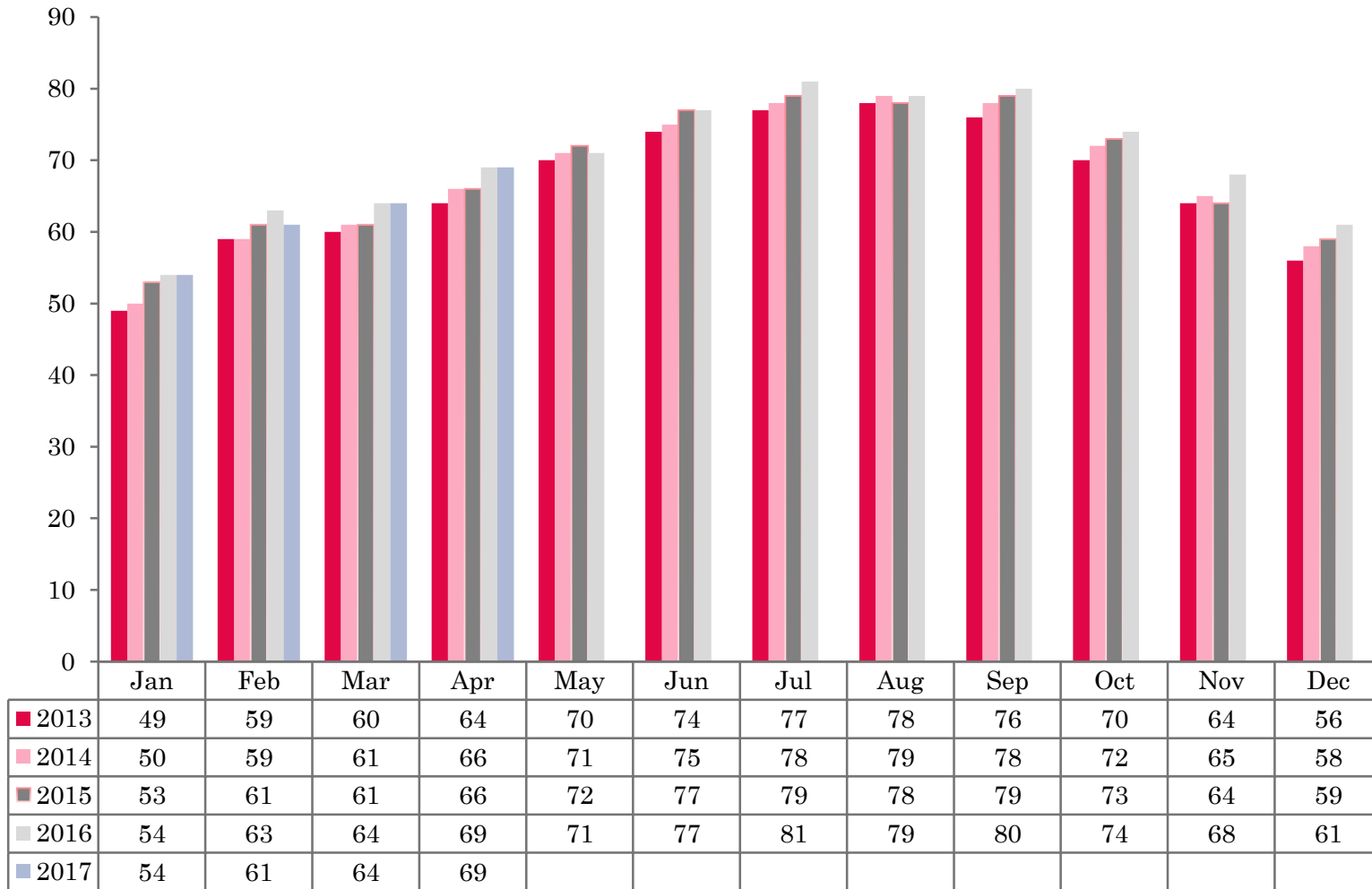
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2013 - 2017



# UK BEDROOM OCCUPANCY 2013 - 2017



- ❖ 2,343 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 increased by 3% when compared to April 2016, up to 53% compared to 50% for the same period last year. Room occupancy levels in the UK were at 69% during April 2017, remaining static when compared with 2016 data.



- Room occupancy levels in the UK fell remained static during April 2017, when compared with the same period the previous year. However, bed occupancy rose by 3%.
- Room occupancy levels in England followed that of the UK as a whole, remaining on a par with April 2016. Bed occupancy levels increased by 2% when compared with the same period in 2016, up to 53% in April 2017.
- Both room and bed occupancy levels in Northern Ireland increased by 3% during April 2017. Room occupancy was at its highest level for 5 years, up to 62% during this month.
- Room occupancy in Wales increased by a healthy 6% during April 2017 when compared to the same period last year with bedspace occupancy also witnessing a rise of 6%, when compared to the same period the previous year.
- Occupancy levels across Scotland were up during April 2017 when compared to the same period in 2016. Room occupancy had increased by 2% whilst bedspace occupancy increased by 8%, a significant increase when compared to the same month the previous year.
- 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, remaining static compared to 2016 data. Northern Ireland increased by 5% when compared with April 2016, whilst Wales remained flat.  
(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 2015 – 2017**

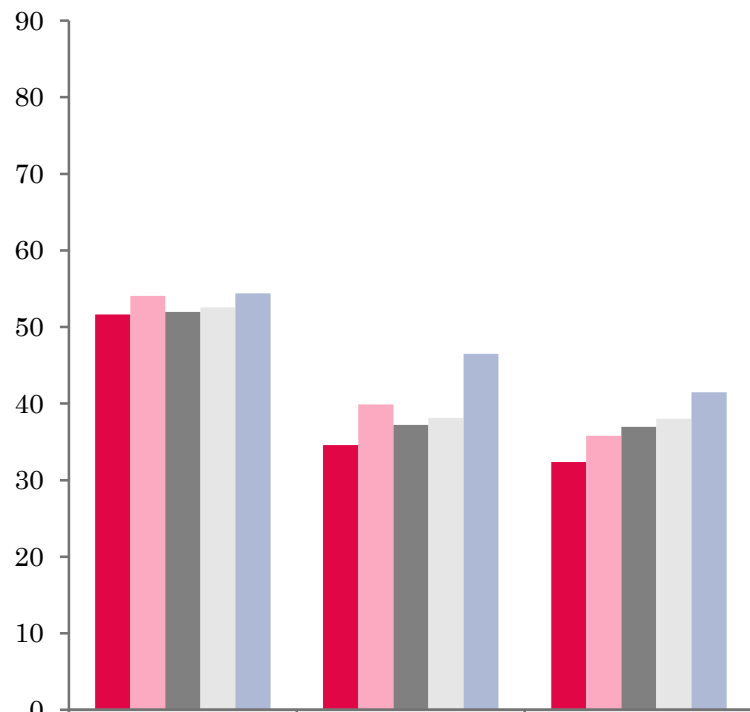
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	50	51	53	68	70	70	1882	1810	1737
Northern Ireland	43	46	49	58	59	62	197	172	197
Scotland	47	44	52	61	60	62	292	261	209
Wales	46	46	52	59	58	64	211	209	200
<b>UK</b>	49	50	53	66	69	69	2582	2452	2343

**Table 2: UK/Non UK Occupancy Levels April 2015 – 2017 (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		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	40	38	38	3	4	4	7	7	8	8	9	10	1882	1810	1737
Northern Ireland	19	19	19	24	26	31	37	37	36	56	58	62	197	172	197
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	292	261	209
Wales	39	37	43	2	2	3	**	**	**	4	6	7	211	209	200
<b>UK</b>	39	38	38	3	4	4	8	7	8	9	10	11	2582	2452	2343

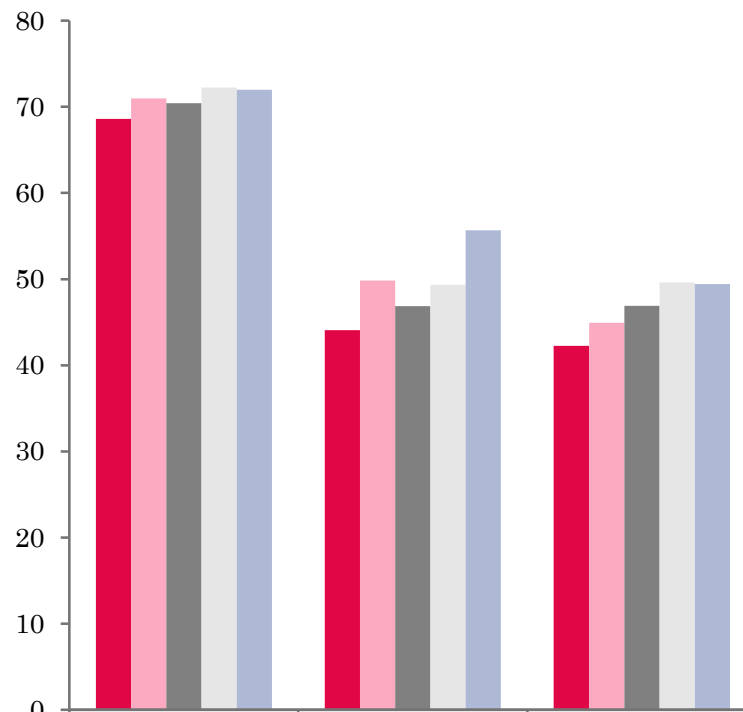


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2013-2017



	Hotels	Guesthouses	B&Bs
2013	52	35	32
2014	54	40	36
2015	52	37	37
2016	53	38	38
2017	54	47	41

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2013-2017



	Hotels	Guesthouses	B&Bs
2013	69	44	42
2014	71	50	45
2015	70	47	47
2016	72	49	50
2017	72	56	49





- Bedspace occupancy levels in hotel establishments in the UK remained flat (+1%) during April 2017, with room occupancy remaining static compared to the same period in 2016. The guesthouse sector fared best during April with increases in both room and bed occupancy, room occupancy up a healthy 7% during this month and bed occupancy up by 9% when compared to April 2016. B&B establishments saw an increase in bed occupancy (+3%) during April compared to 2016 data, with room occupancy levels flat (-1%).
- At the UK level, bed occupancy levels had increased across all size bands when compared with April 2016. The 1-3, 26-50 and >100 size bands all increased by 3%, with all other size bands increasing by 4% in bed occupancy levels this month. Only the 1-3 size band increased in room occupancy levels during April 2017, up by 3% when compared to the same period in 2016. All other size bands remained flat in room occupancy levels this month.
- Bedspace occupancy in small town locations remained flat during April 2017, with bed occupancy levels in all other locations increasing during this month. Both seaside and countryside/village locations saw an increase of 3% respectively in their bed occupancy levels, with city/large town witnessing the largest increase of 5% during this month. Room occupancy remained flat in small town locations during April 2017 when compared to the same period the previous year. Both the seaside and countryside locations increased by 3% when compared to April 2016, with city/large town remaining static.
- Bed occupancy levels remained flat in the £40.00-£49.99 tariff band during April 2017. All other tariff bands witnessed an increase in bedspace occupancy, the largest of these was in the £50.00-£59.99 tariff band where levels increased by 14% when compared to 2016 data. Room occupancy increased in both the £30.00-£39.99 and £50.00-£59.99 tariff bands, 2% and 8% respectively, with all other tariff bands either remaining static or witnessing a decrease when compared to April 2016.



**Table 3: Occupancy Levels by Type of Establishment: April 2015 – 2017**

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	52	53	54	71	73	73	1465	1460	1453
Northern Ireland	53	53	56	70	68	71	80	80	82
Scotland	52	49	58	69	68	65	210	198	101
Wales	51	49	55	66	64	69	167	165	162
<b>UK</b>	52	53	54	70	72	72	1922	1903	1798
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	39	39	47	50	51	56	165	131	107
Northern Ireland	24	26	34	39	38	46	18	20	25
Scotland	32	32	45	35	37	56	35	29	65
Wales	31	35	41	37	40	49	21	21	17
<b>UK</b>	37	38	47	47	49	56	239	201	214
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	39	40	43	50	52	52	252	219	177
Northern Ireland	13	24	27	17	32	33	99	72	90
Scotland	34	24	31	41	35	31	47	34	43
Wales	24	25	33	29	28	33	23	23	21
<b>UK</b>	37	38	41	47	50	49	421	348	331



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: April 2015 – 2017 (see notes 5a & 5b Slide 19)**

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	54	54	58	47	42	49	65	66	70	68	73	69
Northern Ireland	47	46	55	35	34	44	60	57	65	52	52	61
Scotland	53	53	58	44	48	47	63	64	64	62	72	62
Wales	55	52	60	40	40	44	64	60	68	56	57	59
<b>UK</b>	54	54	58	46	42	49	65	66	69	66	72	68



**Table 35: Non-UK Percentages: April 2015 – 2017 (see notes 5a & 5b Slide 19)**

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	5	6	6	9	9	11	6	8	8	9	10	12
Northern Ireland	36	34	35	41	43	38	42	46	44	45	53	45
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	5	6	4	7	8
<b>UK</b>	6	6	6	10	9	11	7	8	8	10	10	12

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: April 2015 - 2017**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	34	33	35	113	38	36	40	172	44	44	48	64
Northern Ireland	9	17	25	74	16	33	32	32	33	30	37	32
Scotland	24	22	33	19	41	36	39	58	50	45	48	67
Wales	25	27	34	21	36	35	41	24	47	43	49	22
<b>UK</b>	32	32	35	227	38	36	40	286	45	44	48	185

**Table 6: Occupancy Levels by Size: April 2015 - 2017**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	52	49	51	42	51	46	48	25	54	56	59	1321
Northern Ireland	43	49	55	21	51	48	58	25	60	60	59	13
Scotland	53	47	64	36	53	54	69	20	55	54	61	9
Wales	50	44	53	18	64	62	70	9	53	54	59	106
<b>UK</b>	52	49	52	117	52	47	51	79	54	56	59	1449



**Table 7: Occupancy Levels by Size: April 2015 – 2017**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 -3 Rooms</b>				<b>4 – 10 Rooms</b>				<b>11 – 25 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	44	41	43	113	49	50	50	172	56	59	59	64
Northern Ireland	13	24	30	74	20	40	37	32	44	44	52	32
Scotland	30	31	46	19	46	43	44	58	61	58	58	67
Wales	29	29	35	21	43	41	49	24	53	52	54	22
<b>UK</b>	41	40	43	375	48	49	49	286	56	59	59	185

**Table 7: Occupancy Levels by Size: April 2015 - 2017**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 – 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	62	67	67	42	69	68	68	25	77	78	79	1321
Northern Ireland	60	59	70	21	68	65	73	25	79	77	73	13
Scotland	68	66	72	36	71	73	81	20	78	76	68	9
Wales	65	57	67	18	74	70	73	9	77	77	82	106
<b>UK</b>	63	67	67	117	70	68	69	79	77	78	78	1449



**Table 8: Occupancy Levels by Location Type: April 2015 - 2017**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	44	42	45	144	56	55	59	1017	45	47	48	340	44	45	48	236
Northern Ireland	32	37	46	50	56	54	57	70	24	30	37	55	17	22	24	22
Scotland	49	44	47	37	53	52	62	44	40	35	40	53	42	37	45	75
Wales	51	48	53	30	42	42	49	8	41	42	50	12	37	36	45	47
<b>UK</b>	45	42	45	261	55	54	59	1139	44	46	47	460	43	44	47	380

**Table 8: Occupancy Levels by Location Type: April 2015 - 2017**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	61	60	62	144	76	77	77	1017	63	67	67	340	57	59	61	236
Northern Ireland	41	46	57	50	74	70	71	70	35	39	48	55	21	36	34	22
Scotland	62	57	60	37	73	72	68	44	54	52	54	53	49	48	50	75
Wales	59	54	56	30	54	60	65	8	54	55	63	12	45	46	54	47
<b>UK</b>	61	59	62	261	74	76	76	1139	61	65	66	460	54	57	60	380

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2015 – 2017 (see note 5a Slide 19)**

**A: Percentage of Bedspace Occupancy**

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	28	27	30	17	30	27	30	52
Northern Ireland	**	**	**	**	9	16	19	10	19	25	27	35
Scotland	**	**	**	**	26	****	34	5	28	22	29	26
Wales	**	**	**	**	11	17	****	2	27	29	31	16
<b>UK</b>	**	**	**	**	26	27	30	32	29	27	30	129

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2015 – 2017 (see note 5a Slide 19)**

**B: Percentage of Bedspace Occupancy**

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	42	40	38	82	45	43	56	58	52	53	55	1500
Northern Ireland	30	36	37	42	49	33	44	18	54	53	55	92
Scotland	36	33	31	53	50	50	71	30	53	52	60	95
Wales	34	40	49	14	44	40	48	13	52	51	57	153
<b>UK</b>	40	39	38	191	46	43	57	119	52	53	55	1840

\*\* FIGURES NOT AVAILABLE





**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2015 – 2017 (see note 5a Slide 19)**

**A: Percentage of Bedroom Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	40	42	37	17	38	35	38	52
Northern Ireland	**	**	**	**	10	23	21	10	24	32	34	35
Scotland	**	**	**	**	24	****	32	5	35	32	30	26
Wales	**	**	**	**	17	26	****	2	33	36	38	16
<b>UK</b>	**	**	**	**	36	41	36	32	37	35	37	129

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2015 – 2017 (see note 5a Slide 19)**

**B: Percentage of Bedroom Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	54	52	49	82	58	56	64	58	71	73	73	1500
Northern Ireland	46	51	50	42	67	49	54	18	71	67	68	92
Scotland	49	47	44	53	67	70	74	30	69	69	64	95
Wales	43	55	61	14	57	52	61	13	66	64	69	153
<b>UK</b>	53	52	49	191	59	57	65	119	70	72	72	1840

\*\* 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 2017 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 2017) 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)

