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UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Summary Report
August 2016

UK OCCUPANCY SURVEY

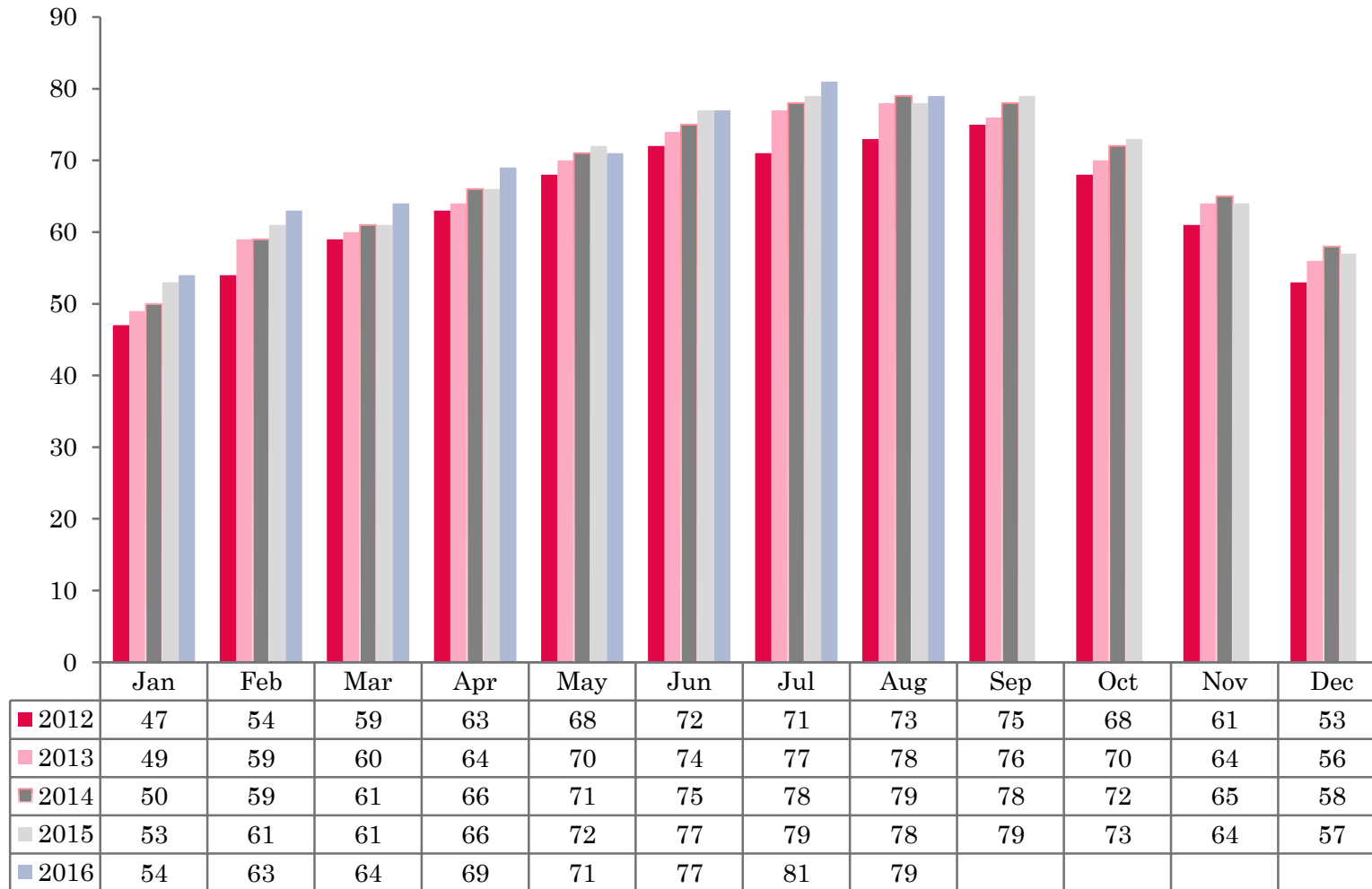
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



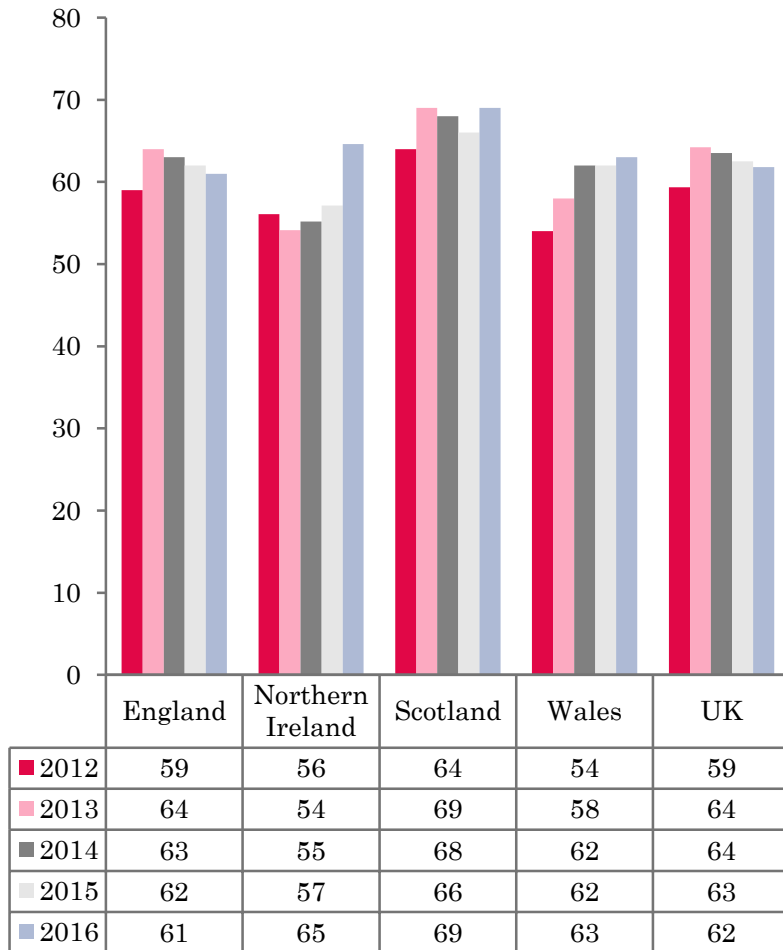
UK BEDROOM OCCUPANCY 2012 - 2016



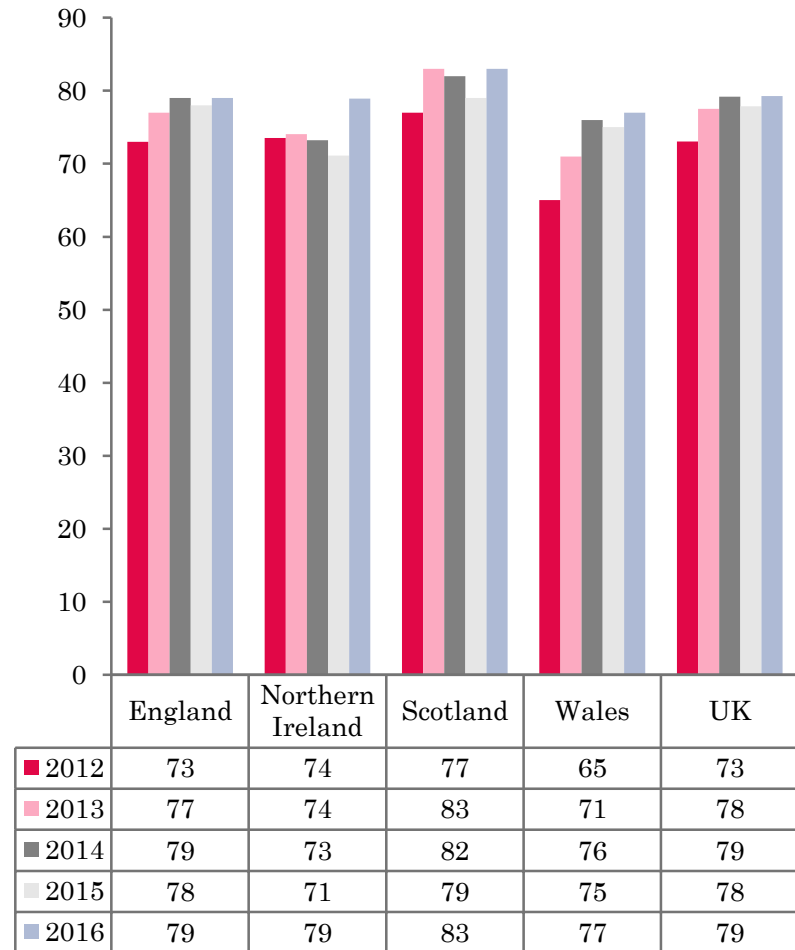
- ❖ 2,437 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace occupancy had remained flat at 62% when compared to the same period the previous year. Room occupancy in the UK had also remained flat at 79%, compared to 2015 data.



NATIONAL BEDSPACE OCCUPANCY AUGUST 2012-2016



NATIONAL ROOM OCCUPANCY AUGUST 2012-2016



- Room occupancy during August 2016 had remained flat (+1%) at 79%, when compared to August 2015. Bedspace occupancy also remained flat (-1%) at 62%, when compared with the same month in 2015.
- Bedspace and room occupancy levels in England remained flat, when compared with the same period in 2015.
- Both room and bed occupancy levels in Northern Ireland increased by a healthy 8% respectively during August 2016. Room occupancy rose to 79% and bed occupancy increased from 57% to 65%.
- Wales room occupancy levels increased during August, up 2%, from 75% to 77%, with bedspace occupancy remaining flat when compared to the same period in 2015.
- Both room and bed occupancy levels across Scotland increased during August 2016 when compared to the same period last year. Bed occupancy levels rose by 3%, with room occupancy up by 4% when compared to the same period in 2015.
- 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 (+1%) with August 2015, whilst Northern Ireland increased by 10%. (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: August 2014 - 2016

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	63	62	61	79	78	79	1885	1841	1793
Northern Ireland	55	57	65	73	71	79	180	180	168
Scotland	68	66	69	82	79	83	303	287	259
Wales	62	62	63	76	75	77	119	213	217
UK	64	63	62	79	78	79	2487	2521	2437

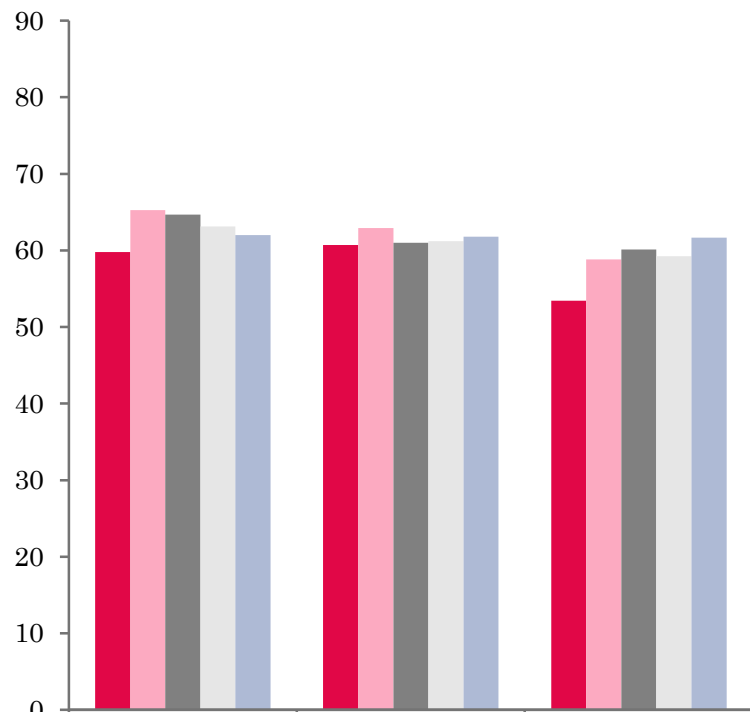
Table 2: UK/Non UK Occupancy Levels August 2014 – 2016 (see note 5a and 5b Slide 19)

	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	54	53	49	7	7	7	11	11	11	12	12	12	1885	1841	1793
Northern Ireland	25	27	25	30	30	40	45	45	43	54	53	62	180	180	168
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	303	287	259
Wales	57	55	57	7	5	6	**	**	**	10	8	10	119	213	217
UK	53	52	49	8	7	7	12	12	11	13	13	13	2487	2521	2437

** FIGURES NOT AVAILABLE

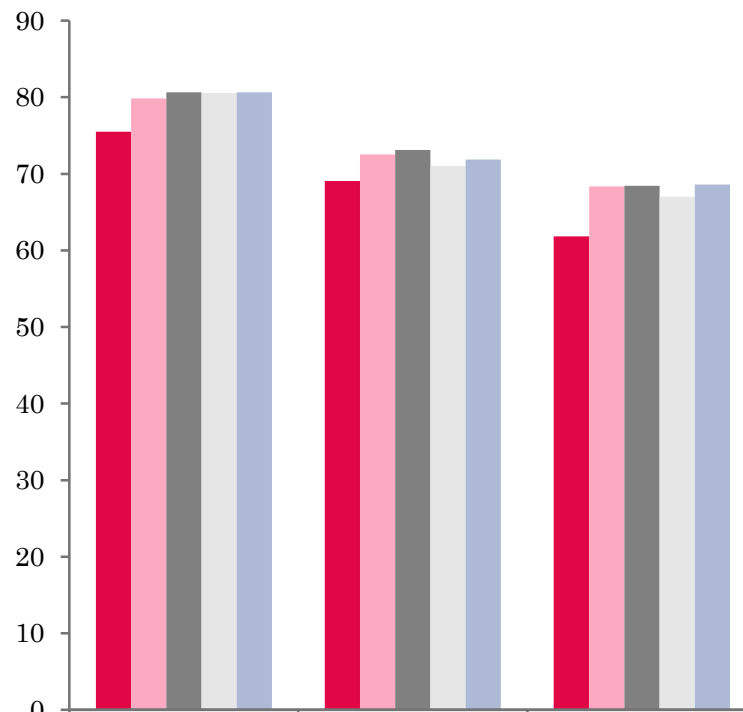


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION AUGUST 2012-2016



	Hotels	Guesthouses	B&Bs
2012	60	61	53
2013	65	63	59
2014	65	61	60
2015	63	61	59
2016	62	62	62

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



	Hotels	Guesthouses	B&Bs
2012	76	69	62
2013	80	73	68
2014	81	73	68
2015	81	71	67
2016	81	72	69



- Room and bedspace occupancy levels in both hotel and guesthouse establishments remained flat when compared to the same period in 2015. B&B establishments increased in both measures of occupancy, with a 3% increase in bed occupancy levels on 2015 results. Room occupancy increased by 2% when compared to August 2015.
- At the UK level, bed occupancy levels had remained flat in three out of the six size bandings when compared with August 2015. Both the 26-50 and 51-100 size banding saw bed occupancy levels decrease by 5% and 4% respectively. Only the 1-3 category saw an increase, with levels up 3% on the same period in 2015. Room occupancy levels remained flat in the 4-10, 11-15 and >100 size bandings. Both the 1-3 and 51-100 size bandings increased in room occupancy this month when compared to August 2015, up by 3% and 4% respectively, with a 3% drop in the 26-50 category.
- Room and bed occupancy levels in both seaside and countryside/village locations increased during August 2016. Bed occupancy was up by 2% in both location types when compared to the same period last year. Room occupancy increased by 3%. Small town locations fell in both measures of occupancy, down 2% in room and 4% in bed compared to August 2015. City/large town bed occupancy levels remained flat during this period.
- Both the £20.00-£29.99 and £30.00-£39.99 tariff bands increased in both measures of occupancy when compared to August 2015. Bed occupancy levels went up 5% in the £30.00-£39.99 size band, with the £20.00-£29.99 size band increasing by 2%. Room occupancy in both these size bandings increased by the same measures as in bed occupancy. The £40.00-£49.99 tariff band remained flat in both bed and room occupancy when compared to August 2015. Bed occupancy in both the £50.00-£59.99 and the >£60.00 bandings decreased by 2% when compared with the previous year. Room occupancy in the £50.00-£59.99 tariff band fell by 2%, with the >£60.00 tariff band remaining flat.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	64	62	61	80	80	80	1454	1457	1457
Northern Ireland	61	65	72	81	81	88	79	81	74
Scotland	68	68	70	84	84	86	209	203	198
Wales	67	65	64	80	79	81	69	173	167
UK	65	63	62	81	81	81	1811	1914	1896
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	61	62	61	74	73	72	168	151	126
Northern Ireland	42	36	37	51	49	52	20	20	18
Scotland	68	63	74	77	67	75	39	34	25
Wales	48	54	59	58	62	67	19	19	23
UK	61	61	62	73	71	72	246	224	192
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	60	60	62	68	68	69	263	233	210
Northern Ireland	41	36	50	54	41	58	81	79	76
Scotland	66	62	62	76	70	70	55	50	36
Wales	52	49	55	59	54	57	31	21	27
UK	60	59	62	68	67	69	430	383	349



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: August 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	66	58	66	59	66	58	78	77	79	78	78	77
Northern Ireland	62	62	66	57	52	59	76	73	78	76	67	76
Scotland	70	68	73	65	64	67	81	78	82	83	82	84
Wales	64	68	70	59	57	58	76	78	80	75	74	75
UK	66	60	67	60	65	59	78	77	79	79	78	78



Table 35: Non-UK Percentages: August 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	9	13	10	13	10	12	10	13	11	13	11	13
Northern Ireland	43	42	41	47	46	46	54	47	45	58	51	49
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	10	8	9	11	9	11
UK	10	14	10	14	11	12	11	14	11	14	12	13

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: August 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	54	51	53	140	65	63	63	189	57	60	61	81
Northern Ireland	39	29	38	63	40	40	58	22	43	47	45	31
Scotland	60	53	62	31	71	67	70	44	70	68	71	39
Wales	51	46	53	27	56	60	60	31	61	65	64	24
UK	54	51	54	261	65	63	63	286	59	61	62	175

Table6: Occupancy Levels by Size: August 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	67	64	58	47	73	66	62	26	63	62	61	1298
Northern Ireland	66	61	75	17	64	66	64	23	60	67	78	12
Scotland	68	67	72	47	65	70	71	42	70	68	68	56
Wales	69	64	59	16	76	75	80	9	67	61	64	112
UK	67	64	59	127	72	67	63	100	64	63	62	1478



Table 7: Occupancy Levels by Size: August 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	61	59	62	140	73	71	72	189	71	72	72	81
Northern Ireland	53	35	43	63	51	44	67	22	56	63	62	31
Scotland	71	64	71	31	80	72	75	44	82	81	85	39
Wales	55	50	54	27	68	70	70	31	68	73	72	24
UK	62	59	62	375	73	71	72	286	72	73	73	175

Table 7: Occupancy Levels by Size: August 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	77	76	72	47	78	78	83	26	83	82	82	1298
Northern Ireland	78	76	84	17	82	80	86	23	85	85	93	12
Scotland	87	83	89	47	80	85	87	42	90	88	87	56
Wales	79	78	75	16	83	78	85	9	93	85	89	112
UK	79	77	74	127	79	79	83	100	85	83	83	1478



Table 8: Occupancy Levels by Location Type: August 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	75	65	66	162	64	63	62	1013	54	59	53	349	62	62	64	269
Northern Ireland	63	59	65	48	61	64	73	56	40	45	41	44	35	27	43	20
Scotland	67	68	71	31	69	68	71	114	60	56	68	55	73	68	67	59
Wales	74	74	70	31	55	53	54	8	66	65	69	12	51	55	57	60
UK	73	66	68	272	64	63	63	1191	55	59	55	460	63	62	64	408

Table 8: Occupancy Levels by Location Type: August 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	82	80	83	162	83	81	81	1013	71	75	71	349	75	73	76	269
Northern Ireland	76	71	79	48	82	80	88	56	50	52	51	44	50	38	56	20
Scotland	77	80	84	31	88	86	87	114	74	71	82	55	82	75	73	59
Wales	81	82	76	31	87	71	75	8	78	77	81	12	62	64	68	60
UK	81	80	83	272	84	81	81	1191	71	74	72	460	75	72	75	408

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	**	**	**	**	57	52	53	21	52	45	51	61
Northern Ireland	**	**	**	**	27	28	22	13	50	29	53	42
Scotland	**	**	**	**	47	51	****	4	61	58	66	32
Wales	**	**	**	**	41	26	32	4	50	46	53	22
UK	**	**	**	**	54	50	52	42	53	47	52	157

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	65	62	60	103	60	62	60	60	63	62	61	1520
Northern Ireland	47	56	58	35	57	58	55	15	60	65	71	63
Scotland	61	60	65	34	72	72	71	16	72	70	72	170
Wales	40	54	57	17	76	60	62	14	71	68	68	161
UK	63	61	60	189	63	63	61	105	65	64	62	1914

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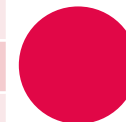


Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) August 2014 – 2016 (see note 5a Slide 19)

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	**	**	**	**	66	60	57	21	63	57	62	61
Northern Ireland	**	**	**	**	53	31	26	13	57	38	62	42
Scotland	**	**	**	**	51	32	****	4	72	67	74	32
Wales	**	**	**	**	58	37	41	4	59	56	63	22
UK	**	**	**	**	63	54	56	42	64	58	63	157

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) August 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	74	70	69	103	72	72	70	60	80	80	80	1520
Northern Ireland	61	66	70	35	75	71	76	15	81	81	86	63
Scotland	73	74	79	34	87	84	86	16	87	85	87	170
Wales	65	65	72	17	80	74	77	14	84	82	82	161
UK	73	70	70	189	75	74	72	105	81	81	81	1914

** 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 2016 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 2016) 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)

