



UNITED KINGDOM OCCUPANCY SURVEY

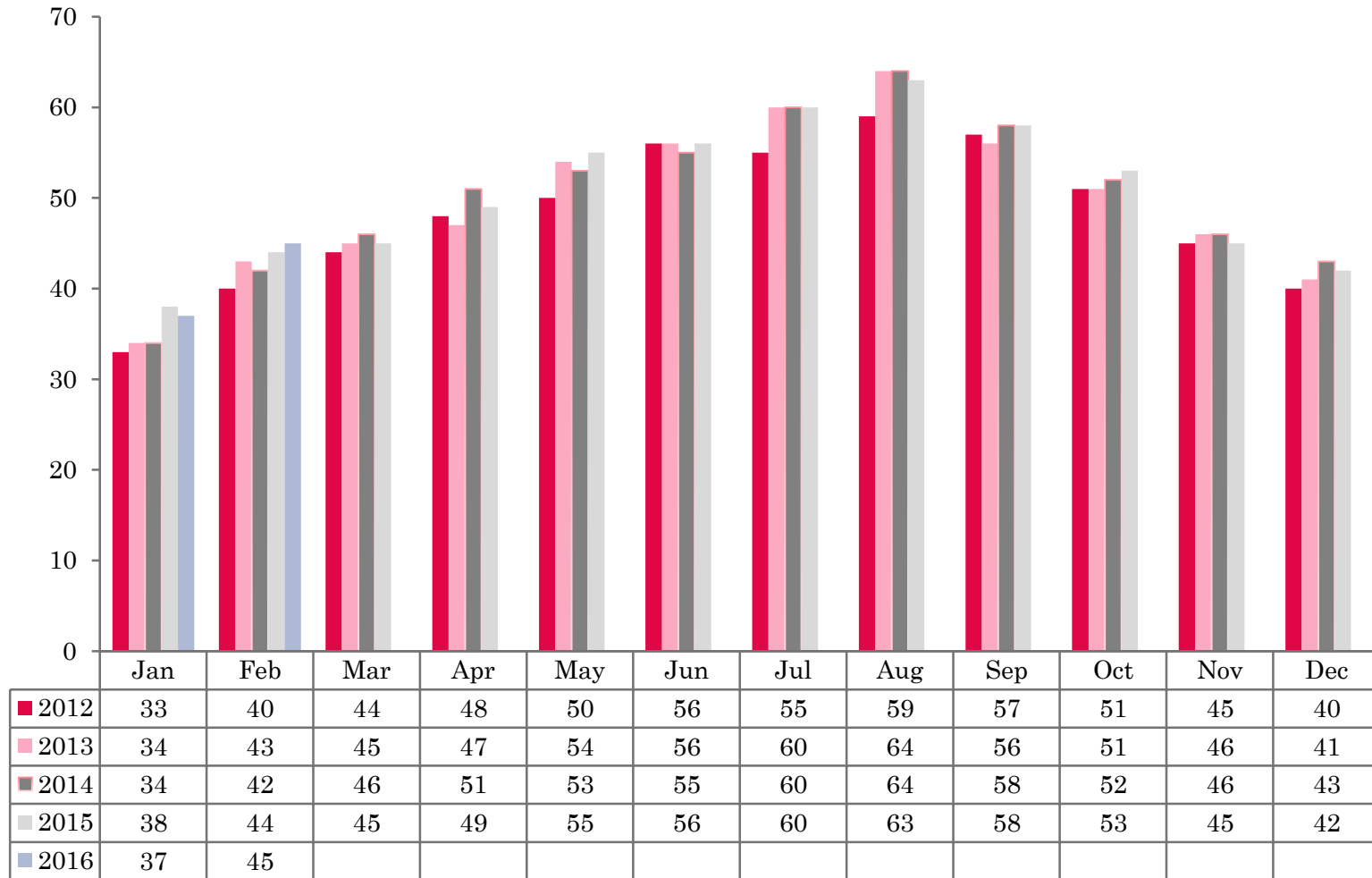
Serviced Accommodation Summary Report
February 2016

UK OCCUPANCY SURVEY

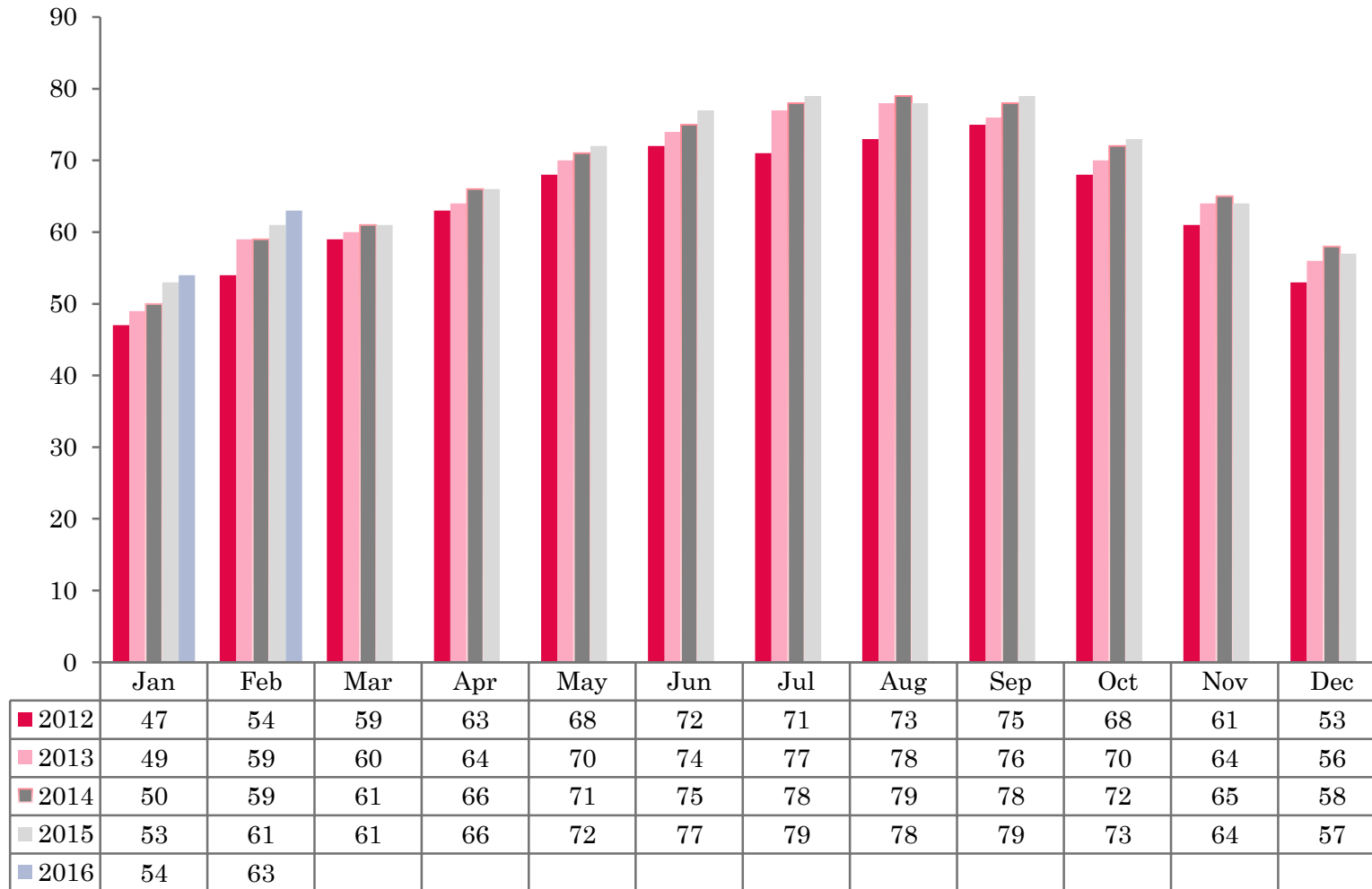
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



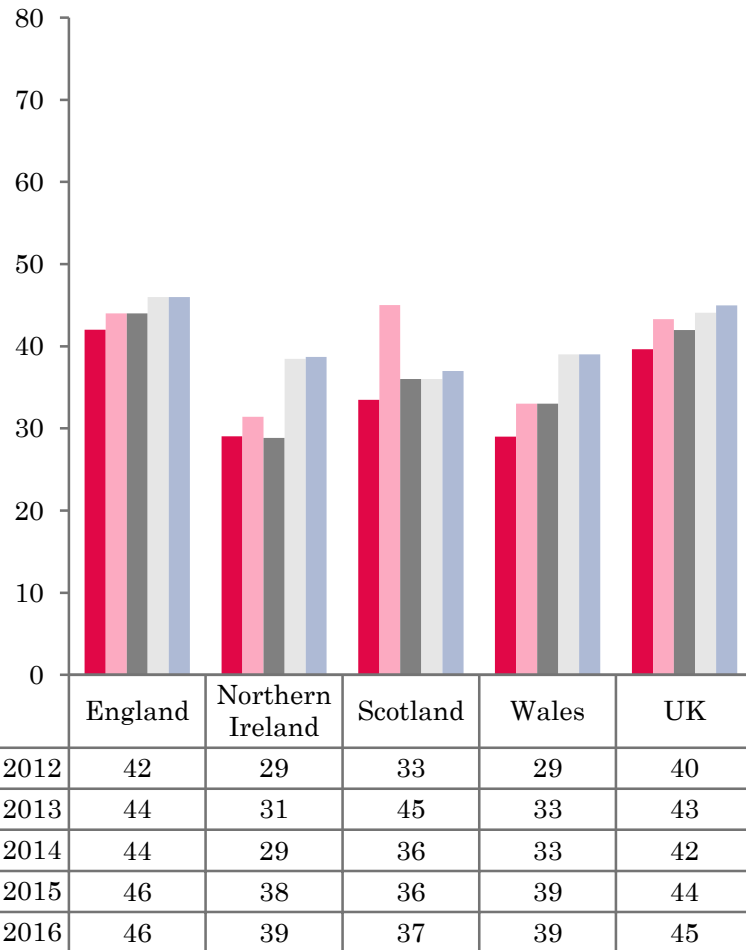
UK BEDROOM OCCUPANCY 2012 - 2016



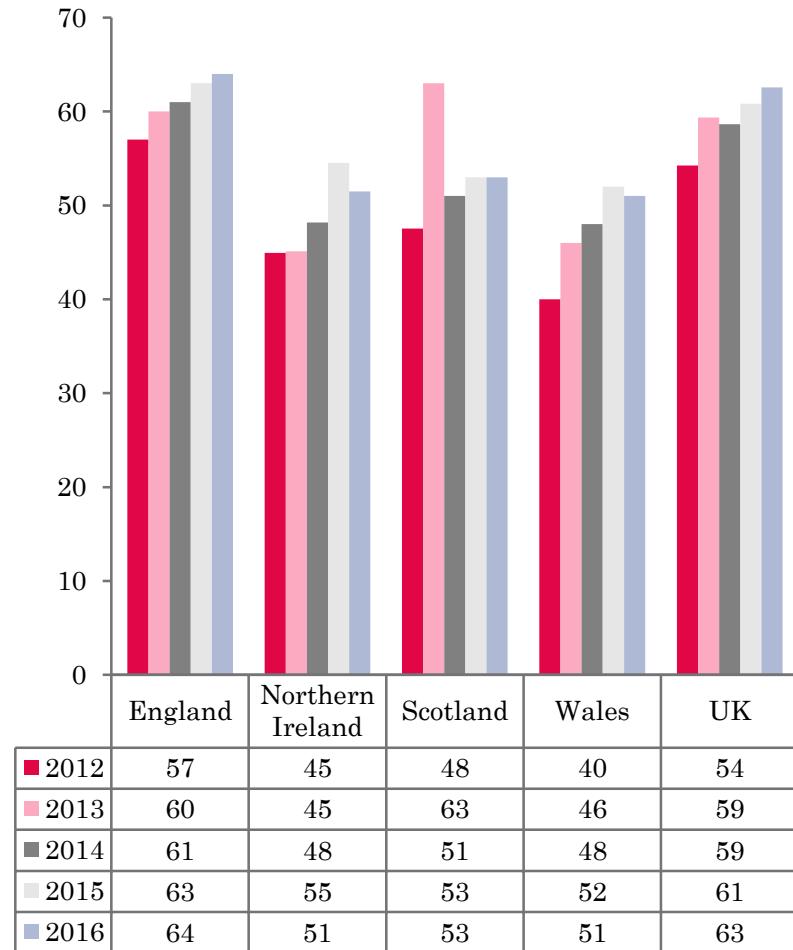
- ❖ 2,405 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace occupancy levels (37%) had remained flat when compared to the same period the previous year. UK room occupancy had increased by 2%, up to 63% when compared to February 2015.



NATIONAL BEDSPACE OCCUPANCY FEBRUARY 2012-2016



NATIONAL ROOM OCCUPANCY FEBRUARY 2012-2016



- UK bedspace occupancy during February 2016 remained flat (45%) when compared with the same month in 2015. Room occupancy increased by 2%, up from 61% in February 2015 to 63% in 2016.
- Both room and bedspace occupancy levels in England remained flat at 64% and 46% (+1% and 0% respectively), when compared with February 2015.
- Room occupancy levels in Northern Ireland fell during February 2016. Room occupancy had decreased by 4%, whilst bed occupancy remained flat (+1%) when compared to the same period in 2015.
- Wales saw little change in both measures of occupancy during February, with both room and bedspace occupancy remaining flat compared to the same period in 2015.
- A similar picture was seen in Scotland with both room and bedspace occupancy levels remaining flat across Scotland during February 2016.
- 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 January 2015, whilst Northern Ireland also 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: February 2014 - 2016

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	44	46	46	61	63	64	1912	1833	1793
Northern Ireland	29	38	39	48	55	51	201	186	173
Scotland	36	36	37	51	53	53	285	259	235
Wales	33	39	39	48	52	51	114	204	204
UK	42	44	45	59	61	63	2512	2482	2405

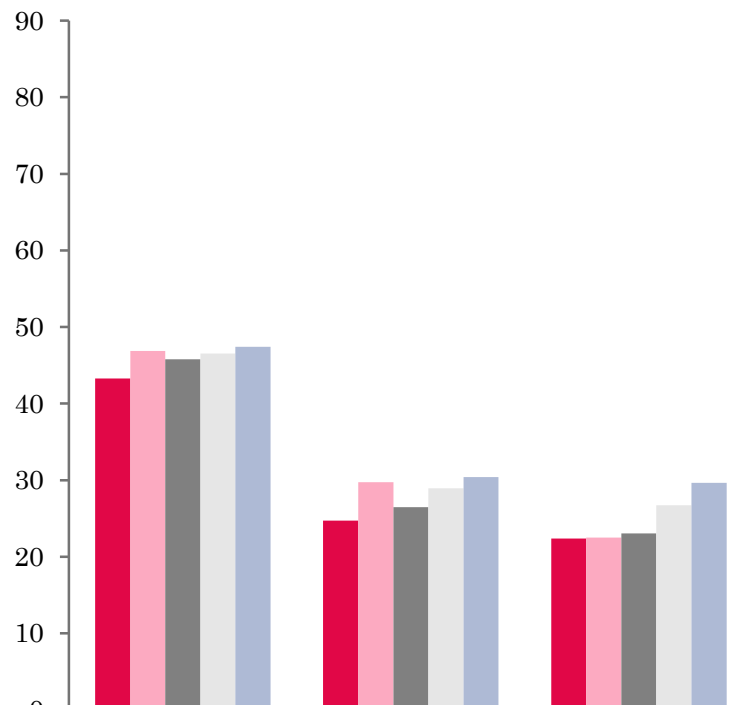
Table 2: UK/Non UK Occupancy Levels February 2014 – 2016 (see note 5a and 5b Slide 19)

	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	27	32	31	2	2	3	5	5	5	8	7	8	1912	1833	1793
Northern Ireland	13	19	20	15	20	19	35	29	28	53	52	48	201	186	173
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	285	259	235
Wales	26	29	26	1	1	2	**	**	**	5	3	7	114	204	204
UK	27	31	31	2	2	3	6	6	5	9	8	9	2512	2482	2405

** FIGURES NOT AVAILABLE

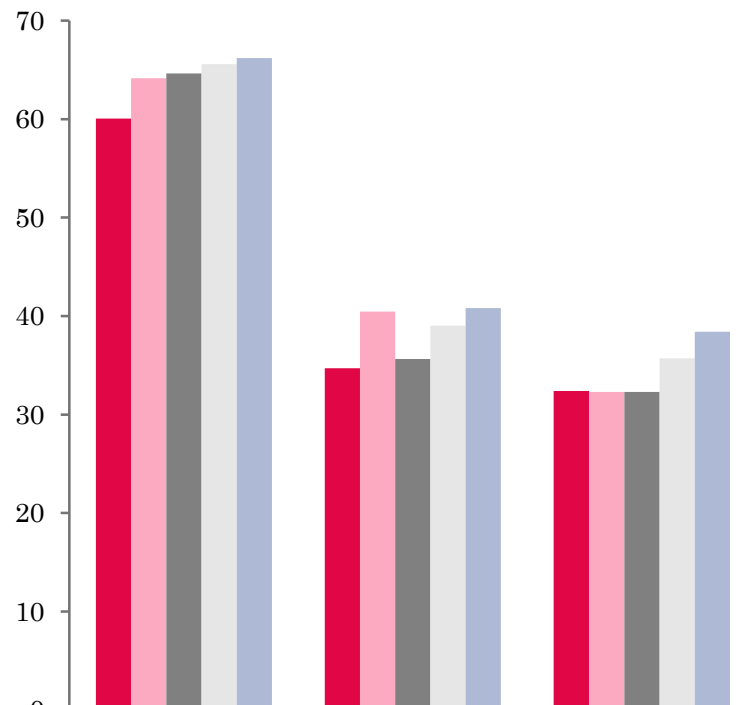


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION FEBRUARY 2012-2016



	Hotels	Guesthouses	B&Bs
2012	43	25	22
2013	47	30	22
2014	46	26	23
2015	47	29	27
2016	47	30	30

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



	Hotels	Guesthouses	B&Bs
2012	60	35	32
2013	64	40	32
2014	65	36	32
2015	66	39	36
2016	66	41	38



- Bed and room occupancy levels in the hotel sector remained flat during February 2016. Guesthouse bed occupancy remained flat when compared to February 2015, with room occupancy up 2% on the same period last year. B&B's bed occupancy levels increased by 3% compared to the same period in 2015, with room occupancy levels up 2%.
- At the UK level, bed occupancy levels in four out of the six size bands had remained flat when compared to the same month in 2015. An increase in bed occupancy levels was found in the 51-100 size banding, where occupancy was up by 3% when compared to February 2015. Room occupancy in both the 1-3 and >100 size bandings fell by 3% and 2% respectively, when compared to February 2015. All other size bandings increased in room occupancy during this month, with the 4-10, 11-25 and 51-100 size bandings seeing an increase of 3% when compared to the same period in 2015.
- Bedspace occupancy remained flat in 3 out of the 4 location types when compared with the same month in 2015. Seaside bedspace occupancy was the only location to see any increase, up by 2% when compared to the same period in 2015. Room occupancy remained flat in both Countryside/village and City/Large town locations. Both Seaside and small town locations saw an increase in room occupancy during this month, up by 2% and 3% respectively when compared to February 2015.
- Only the £20.00-£29.99 tariff band witnessed an increase in bed occupancy during February 2016, up by 4% on the same period in 2015. All other tariff bands remained flat in February when compared to the same period the previous year. Room occupancy levels in the £50.00-£59.99 tariff band were up by 2% in February 2016, all other remaining tariff bands all remained on a par when compared with the same month in 2015.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	47	48	48	66	67	67	1464	1455	1460
Northern Ireland	36	46	45	60	64	59	84	74	76
Scotland	43	39	43	61	60	61	217	201	198
Wales	39	45	43	56	60	59	67	168	167
UK	46	47	47	65	66	66	1832	1898	1901
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	29	31	32	39	42	43	176	147	125
Northern Ireland	19	13	20	27	25	37	27	19	23
Scotland	19	25	17	24	32	22	30	24	16
Wales	12	15	23	20	19	28	18	16	19
UK	26	29	30	36	39	41	251	206	183
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	25	29	32	35	39	41	272	231	208
Northern Ireland	5	10	14	11	15	19	90	93	74
Scotland	19	21	13	26	27	22	38	34	21
Wales	12	15	12	17	18	14	29	20	18
UK	23	27	30	32	36	38	429	378	321



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: February 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	46	47	49	42	44	44	56	57	60	64	66	67
Northern Ireland	38	45	44	25	29	27	58	60	53	50	50	42
Scotland	41	37	42	33	34	34	50	52	52	52	54	55
Wales	37	45	45	28	34	33	46	53	52	46	52	50
UK	45	45	48	40	42	43	55	56	59	61	63	65



Table 35: Non-UK Percentages: February 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	4	4	4	6	6	7	7	7	8	9	9	9
Northern Ireland	29	26	24	35	24	28	41	29	33	45	27	34
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	2	3	7	3	4	8
UK	5	5	4	7	6	7	8	7	8	10	9	9

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Table 6: Occupancy Levels by Size: February 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	20	22	19	135	23	28	29	191	33	36	37	83
Northern Ireland	6	5	11	63	8	15	18	22	21	27	26	33
Scotland	14	16	14	18	26	31	23	33	38	36	37	38
Wales	9	16	11	15	16	23	24	30	22	43	38	23
UK	18	20	18	231	23	28	28	276	33	36	37	177

Table6: Occupancy Levels by Size: February 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	44	45	45	50	43	40	42	28	52	52	52	1306
Northern Ireland	27	24	36	21	38	46	42	21	40	53	52	14
Scotland	39	37	40	46	48	33	51	44	49	50	46	56
Wales	34	39	38	18	35	52	53	8	33	49	49	110
UK	42	43	44	135	43	40	43	101	50	52	51	1486



Table 7: Occupancy Levels by Size: February 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	27	31	27	135	33	38	41	191	47	50	52	83
Northern Ireland	10	9	16	63	12	22	23	22	35	38	39	33
Scotland	20	23	24	18	33	39	30	33	52	47	50	38
Wales	10	18	12	15	22	28	30	30	32	49	49	23
UK	25	29	26	375	32	37	40	276	47	49	52	177

Table 7: Occupancy Levels by Size: February 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	61	59	60	50	57	57	61	28	73	75	73	1306
Northern Ireland	50	54	48	21	55	59	56	21	69	70	67	14
Scotland	56	54	60	46	68	67	69	44	70	71	67	56
Wales	49	54	52	18	50	62	65	8	59	72	72	110
UK	59	58	60	135	58	59	62	101	72	74	72	1486



Table 8: Occupancy Levels by Location Type: February 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	29	35	37	156	53	53	51	1016	40	42	42	358	35	35	35	263
Northern Ireland	21	24	26	44	35	49	46	63	22	23	27	47	10	11	18	19
Scotland	32	34	36	23	45	40	46	114	26	30	29	48	32	32	27	50
Wales	36	41	38	32	41	44	42	9	31	30	32	11	26	27	27	45
UK	30	35	37	255	51	51	50	1202	37	39	40	464	34	34	34	377

Table 8: Occupancy Levels by Location Type: February 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	44	50	52	156	72	73	72	1016	58	60	61	358	48	50	48	263
Northern Ireland	29	36	32	44	60	66	60	63	30	32	37	47	26	21	28	19
Scotland	43	45	46	23	65	67	66	114	41	43	49	48	40	41	38	50
Wales	44	49	44	32	72	63	61	9	41	42	43	11	37	35	36	45
UK	44	49	51	255	71	71	71	1202	54	56	59	464	46	47	47	377

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	**	**	**	**	11	13	17	18	19	17	18	68
Northern Ireland	**	**	**	**	5	7	1	9	6	11	17	48
Scotland	**	**	**	**	18	16	15	4	18	21	18	22
Wales	**	**	**	**	3	6	14	4	15	18	17	16
UK	**	**	**	**	11	13	17	35	18	17	18	154

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	27	29	28	92	33	37	39	67	47	49	48	1548
Northern Ireland	24	27	27	38	38	50	30	10	33	45	45	68
Scotland	27	28	23	26	44	42	42	13	45	41	44	170
Wales	24	18	26	15	37	34	31	15	40	46	45	154
UK	27	28	28	171	35	38	39	105	46	48	48	1940

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	**	**	**	**	22	27	28	18	31	25	25	68
Northern Ireland	**	**	**	**	8	13	3	9	9	17	22	48
Scotland	**	**	**	**	27	33	19	4	28	27	29	22
Wales	**	**	**	**	5	9	19	4	23	22	24	16
UK	**	**	**	**	22	27	27	35	30	25	25	154

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	35	41	40	92	44	48	52	67	65	67	67	1548
Northern Ireland	38	36	42	38	61	67	41	10	56	63	59	68
Scotland	41	41	40	26	61	58	56	13	62	63	61	170
Wales	37	42	46	15	43	42	41	15	59	62	58	154
UK	36	41	40	171	47	50	52	105	64	66	66	1940

** 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)

