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UNITED KINGDOM OCCUPANCY SURVEY

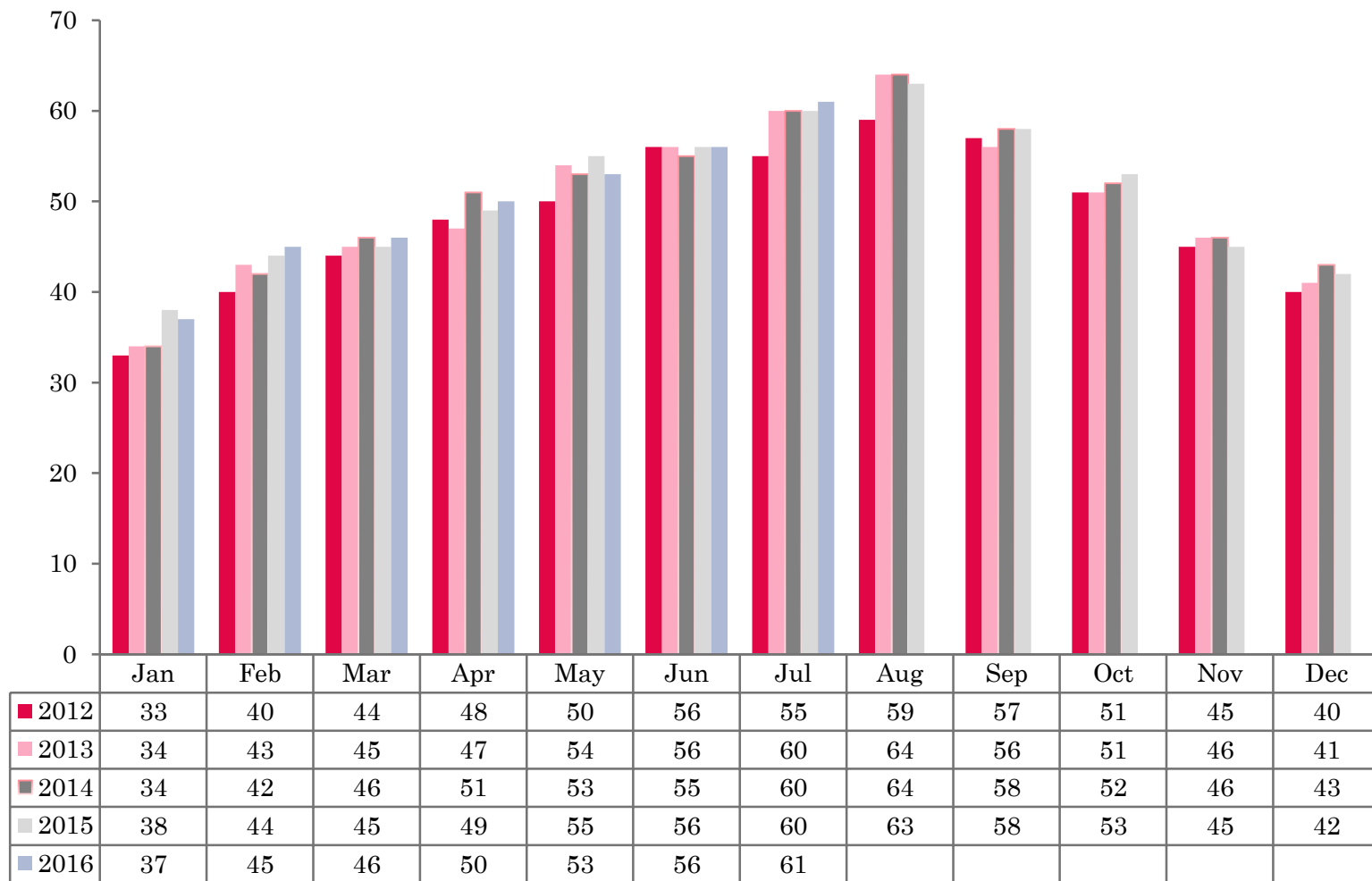
Serviced Accommodation Summary Report
July 2016

UK OCCUPANCY SURVEY

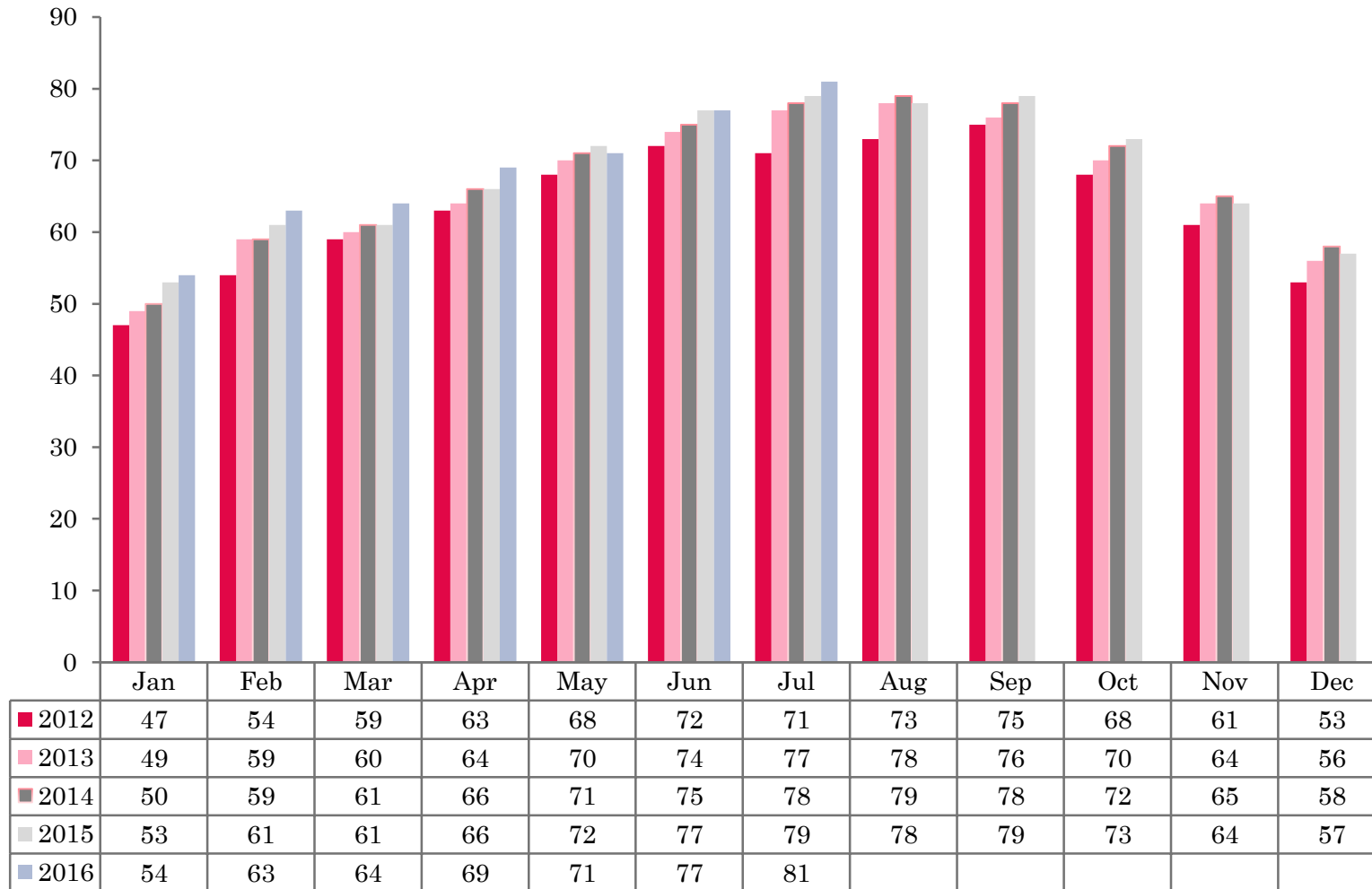
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



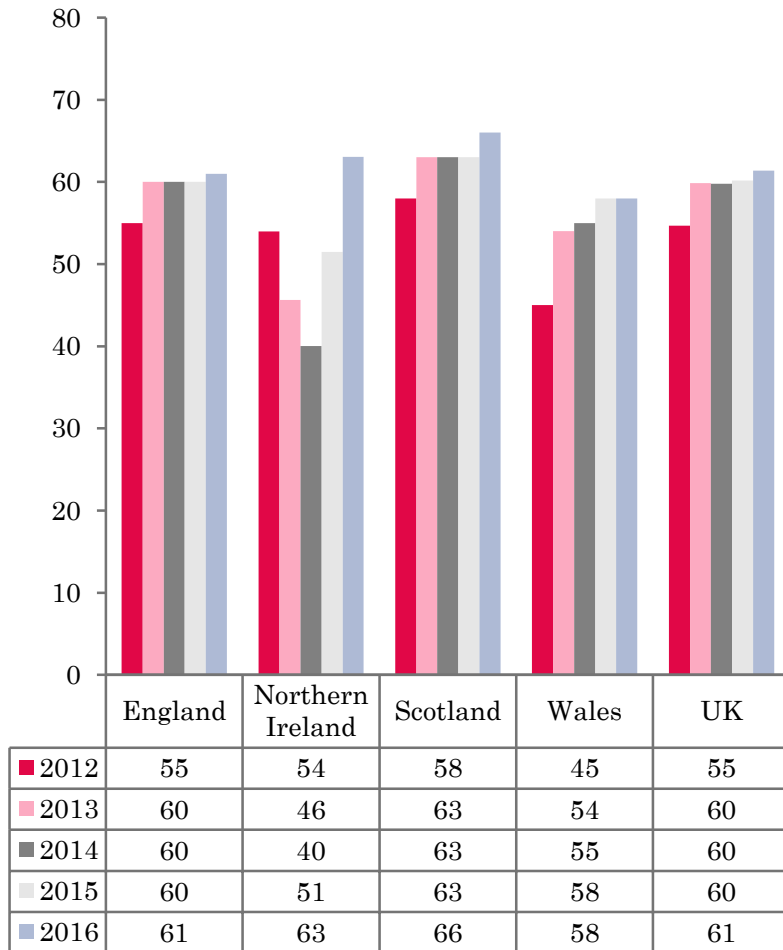
UK BEDROOM OCCUPANCY 2012 - 2016



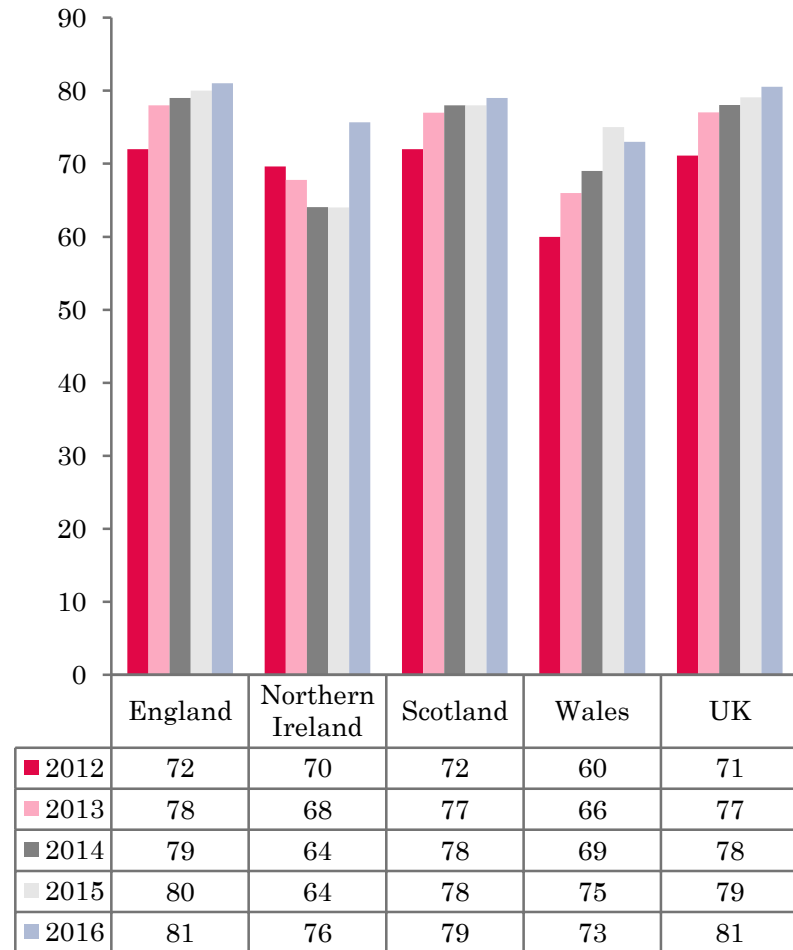
- ❖ 2,431 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace occupancy had remained flat at 61% when compared to the same period the previous year. Room occupancy in the UK had increased by 2%, up to 81% in July 2016 compared to 2015 data.



NATIONAL BEDSPACE OCCUPANCY JULY 2012-2016



NATIONAL ROOM OCCUPANCY JULY 2012-2016



- Room occupancy during July 2016 had increased by 2%, up to 81%, when compared to July 2015. Bedspace occupancy remained flat when compared with the same month in 2015.
- Bedspace and room occupancy levels in England remained flat, when compared with the same period the previous year.
- Room occupancy levels in Northern Ireland increased by a healthy 12% during July 2016, up to 76%. Bed occupancy also saw a 12% increase on July 2015.
- Wales saw a fall in room occupancy during July, with room occupancy down 2%, from 75% to 63%, with bedspace occupancy remaining flat when compared to the same period in 2015.
- Room occupancy levels across Scotland remained flat (+1%) during this month when compared to the same period last year. Bed occupancy levels were up 3% when compared to the same period in 2015.
- Across the UK as a whole, bedspace occupancy by non-UK residents had fallen by 2% when compared with the previous year. England mirrored the UK. Wales remained on a par with July 2015, whilst Northern Ireland increased by 8%. (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: July 2014 - 2016

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	60	60	61	79	80	81	1920	1868	1794
Northern Ireland	40	51	63	64	64	76	180	189	162
Scotland	63	63	66	78	78	79	283	286	258
Wales	55	58	58	69	75	73	119	211	217
UK	60	60	61	78	79	81	2502	2554	2431

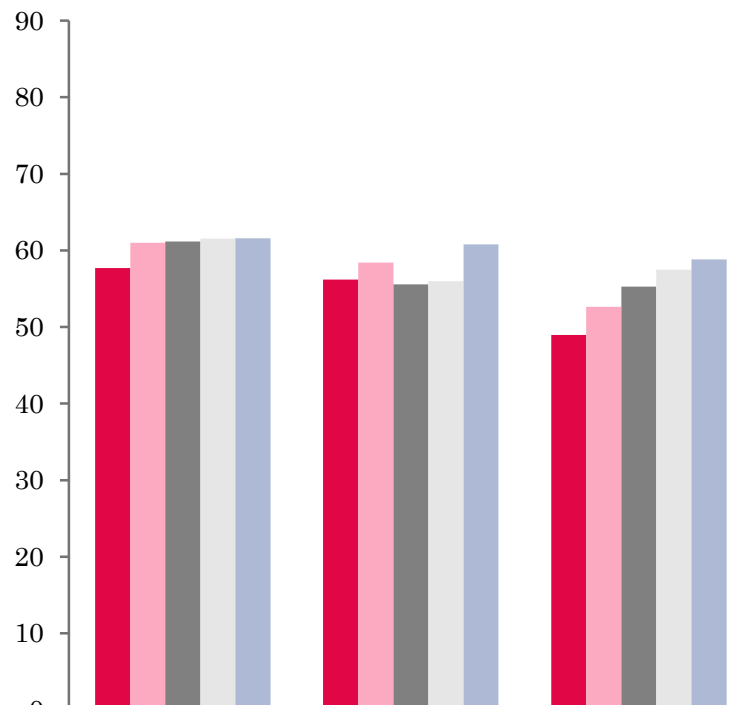
Table 2: UK/Non UK Occupancy Levels July 2014 – 2016 (see note 5a and 5b Slide 19)

	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	49	51	51	8	8	6	12	13	10	13	13	11	1920	1868	1794
Northern Ireland	21	23	26	19	29	37	42	43	40	47	56	59	180	189	162
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	283	286	258
Wales	49	49	49	6	6	6	**	**	**	11	11	11	119	211	217
UK	48	50	51	8	8	6	13	14	10	14	14	12	2502	2554	2431

** FIGURES NOT AVAILABLE

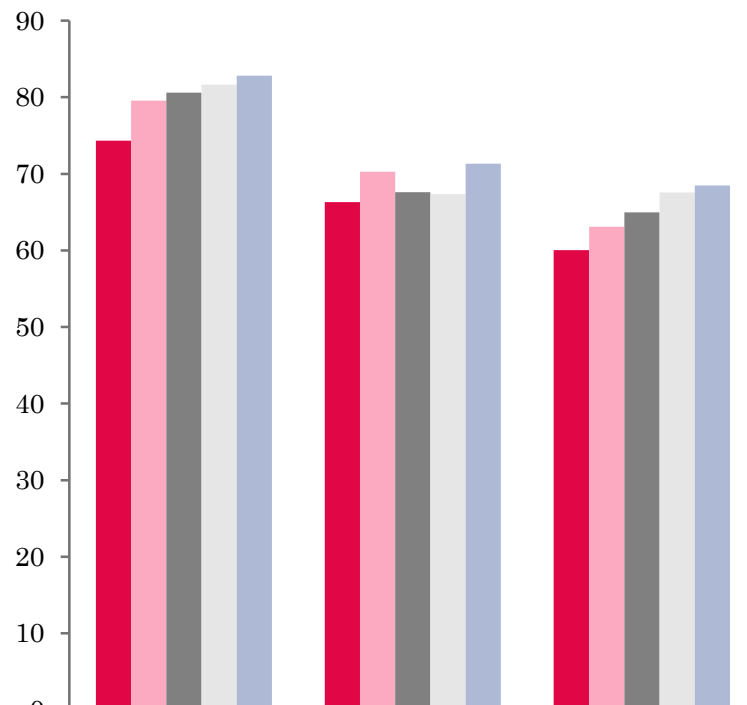


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JULY 2012-2016



	Hotels	Guesthouses	B&Bs
■ 2012	58	56	49
■ 2013	61	58	53
■ 2014	61	56	55
■ 2015	62	56	57
■ 2016	62	61	59

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



	Hotels	Guesthouses	B&Bs
■ 2012	74	66	60
■ 2013	80	70	63
■ 2014	81	68	65
■ 2015	82	67	68
■ 2016	83	71	68



- Room occupancy levels in both hotels and B&B's remained flat when compared to July 2015. Guesthouse room occupancy fared better, with a 4% increase on last years figures. Bed occupancy levels in the B&B's sector was up by 2%, with hotel occupancy remaining on a par with levels in July 2015. Guesthouses room occupancy increased by 5% when compared to the same month in 2015.
- At the UK level, bed occupancy levels had remained flat in three out of the six size bandings when compared with July 2015. The only decrease was in the 26-50 size banding, down by 6%. Bed occupancy levels increased in both the 1-3 and 4-10 size bandings, up by 2% and 6% respectively. Room occupancy levels decreased in the 26-50 (-5%) and >100 (-3%) size bandings during July 2016. Both the 1-3 and 51-100 size categories increased by 2% this month when compared to July 2015, with the 4-10 size band witnessing the largest increase in room occupancy, up by 3% on 2015 data.
- Both room and bedspace occupancy levels in Seaside and countryside/village locations increased during July 2016. A 4% increase in bed occupancy for both seaside and countryside/village locations was evident during this month, with a 5% increase in room occupancy levels for seaside locations. Countryside/village locations was up 2% in room occupancy when compared to the same period last year. Small town locations fell in both measures of occupancy, down 5% in room and 3% in bed compared to July 2015. City/large town bed occupancy levels remained flat, with room witnessing a slight drop, down 2%.
- Three out of the five tariff bands remained flat in bedspace occupancy during July 2016. The £40.00-£49.99, £50.00-£59.99 and the >£60.00 bandings all remained on par with the previous year. Bed occupancy in the £20.00-£29.99 tariff band increased by a healthy 9%, with the £30.00-£39.00 tariff band witnessing a 3% increase in bed occupancy during 2016. Both the £20.00-£29.99 and £30.00-£39.00 tariff bands increased in bed occupancy levels during July 2016, with all other tariff bands witnessing a fall

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	61	61	61	81	82	83	1467	1469	1455
Northern Ireland	42	58	70	72	73	84	82	75	71
Scotland	65	65	67	82	82	83	199	202	195
Wales	60	61	60	74	79	77	68	167	167
UK	61	62	62	81	82	83	1816	1913	1888
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	56	57	61	69	69	72	174	156	127
Northern Ireland	43	24	33	51	36	47	21	16	18
Scotland	60	57	66	68	65	72	38	35	28
Wales	41	51	51	52	62	60	19	21	21
UK	56	56	61	68	67	71	252	228	194
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	56	58	59	66	69	69	279	243	212
Northern Ireland	29	36	46	36	40	54	77	98	73
Scotland	59	61	62	69	69	69	46	49	35
Wales	44	48	50	50	53	57	32	23	29
UK	55	57	59	65	68	68	434	413	349



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: July 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	62	64	66	57	57	58	75	76	79	80	81	77
Northern Ireland	47	54	62	42	48	58	68	65	73	66	64	73
Scotland	65	66	68	62	62	65	76	77	78	80	79	82
Wales	60	64	63	52	55	52	69	75	74	66	76	72
UK	62	64	66	57	57	58	75	76	79	79	80	77



Table 35: Non-UK Percentages: July 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	11	11	10	14	15	12	13	12	11	14	15	13
Northern Ireland	40	42	40	45	46	42	43	43	44	48	46	46
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	10	9	10	11	13	12
UK	12	12	10	15	16	12	14	13	11	15	16	13

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: July 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	52	51	53	140	56	57	63	189	57	60	61	81
Northern Ireland	22	22	35	61	40	45	54	21	37	37	43	27
Scotland	53	57	59	27	63	62	66	49	65	63	67	43
Wales	42	42	47	28	53	55	52	31	54	60	54	22
UK	51	51	53	256	57	57	63	290	58	60	61	173

Table6: Occupancy Levels by Size: July 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	65	65	58	47	75	61	62	26	59	60	61	1311
Northern Ireland	50	55	75	18	47	61	65	23	38	59	75	12
Scotland	66	66	68	47	65	69	71	40	64	63	64	52
Wales	57	61	61	18	70	69	73	9	58	60	60	109
UK	64	65	59	130	73	63	63	98	59	60	61	1484



Table 7: Occupancy Levels by Size: July 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	60	60	62	140	67	69	72	189	73	73	72	81
Northern Ireland	31	28	41	61	46	52	63	21	49	48	58	27
Scotland	64	66	66	27	72	70	74	49	79	77	80	43
Wales	50	48	55	28	63	68	62	31	64	72	64	22
UK	59	60	62	375	67	69	72	290	73	73	72	173

Table 7: Occupancy Levels by Size: July 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	79	78	72	47	78	80	83	26	84	85	82	1311
Northern Ireland	74	67	81	18	69	77	81	23	77	74	90	12
Scotland	81	82	84	47	83	85	85	40	88	86	84	52
Wales	72	77	75	18	81	77	83	9	88	88	86	109
UK	79	78	73	130	79	81	83	98	84	85	82	1484



Table 8: Occupancy Levels by Location Type: July 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	64	61	66	162	61	62	62	1010	55	57	53	349	59	59	64	269
Northern Ireland	51	50	62	43	39	59	71	54	36	37	44	43	33	28	35	22
Scotland	67	69	70	33	63	63	67	113	57	58	64	55	65	63	63	57
Wales	64	66	61	32	55	57	58	7	58	61	69	11	46	51	51	61
UK	64	62	66	270	61	62	62	1184	55	57	54	458	59	59	63	409

Table 8: Occupancy Levels by Location Type: July 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	74	77	83	162	84	84	81	1010	76	77	71	349	73	74	76	269
Northern Ireland	70	62	76	43	71	73	84	54	45	47	52	43	42	36	48	22
Scotland	78	80	80	33	84	83	85	113	71	72	75	55	75	74	72	57
Wales	76	77	70	32	76	74	79	7	73	77	83	11	58	62	63	61
UK	75	77	82	270	83	83	81	1184	74	76	71	458	72	73	75	409

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	**	**	**	**	41	42	53	21	44	50	51	61
Northern Ireland	**	**	**	**	17	18	21	10	29	34	46	41
Scotland	**	**	**	**	46	55	****	1	55	51	63	31
Wales	**	**	**	**	43	26	23	3	44	42	44	21
UK	**	**	**	**	41	43	52	34	45	49	52	154

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	62	60	60	105	56	60	60	65	60	61	61	1542
Northern Ireland	40	47	52	32	52	52	52	17	41	59	70	42
Scotland	60	64	63	36	70	67	73	19	66	66	67	170
Wales	38	49	49	19	60	63	66	14	63	64	62	158
UK	60	60	60	192	58	61	61	115	61	62	62	1912

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) July 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	**	**	**	**	54	53	57	21	56	60	62	61
Northern Ireland	**	**	**	**	23	27	30	10	35	39	51	41
Scotland	**	**	**	**	51	70	****	1	66	60	69	31
Wales	**	**	**	**	61	36	27	3	55	56	53	21
UK	**	**	**	**	53	54	56	34	57	59	62	154

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) July 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	72	69	105	69	73	70	65	81	82	80	1542
Northern Ireland	54	59	65	32	68	66	75	17	72	73	83	42
Scotland	74	75	73	36	80	80	86	19	83	82	82	170
Wales	62	65	67	19	72	77	77	14	76	81	79	158
UK	73	72	69	192	71	74	72	115	81	82	80	1912

** 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 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)

