



# UNITED KINGDOM OCCUPANCY SURVEY

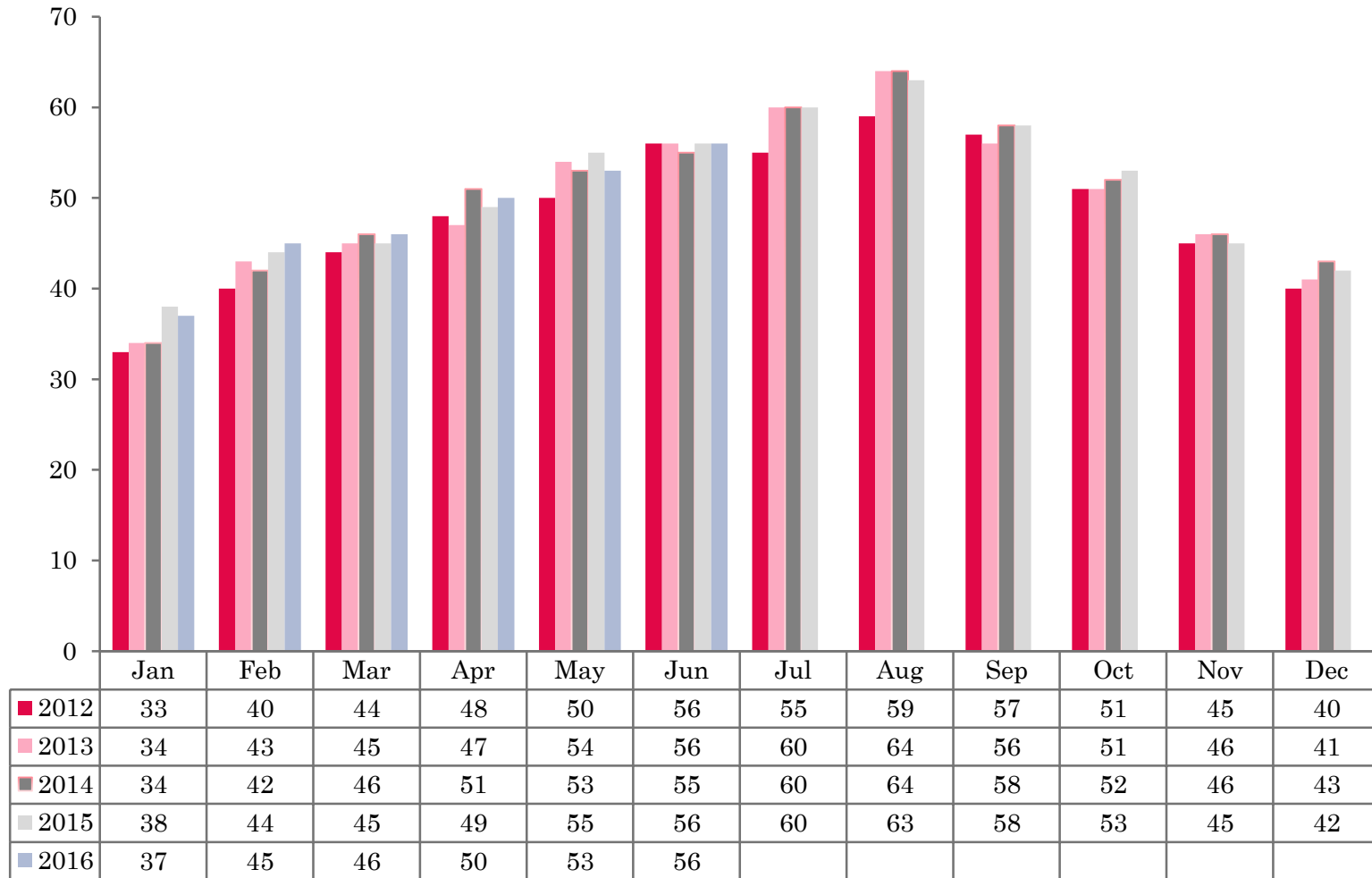
Serviced Accommodation Summary Report  
June 2016

# UK OCCUPANCY SURVEY

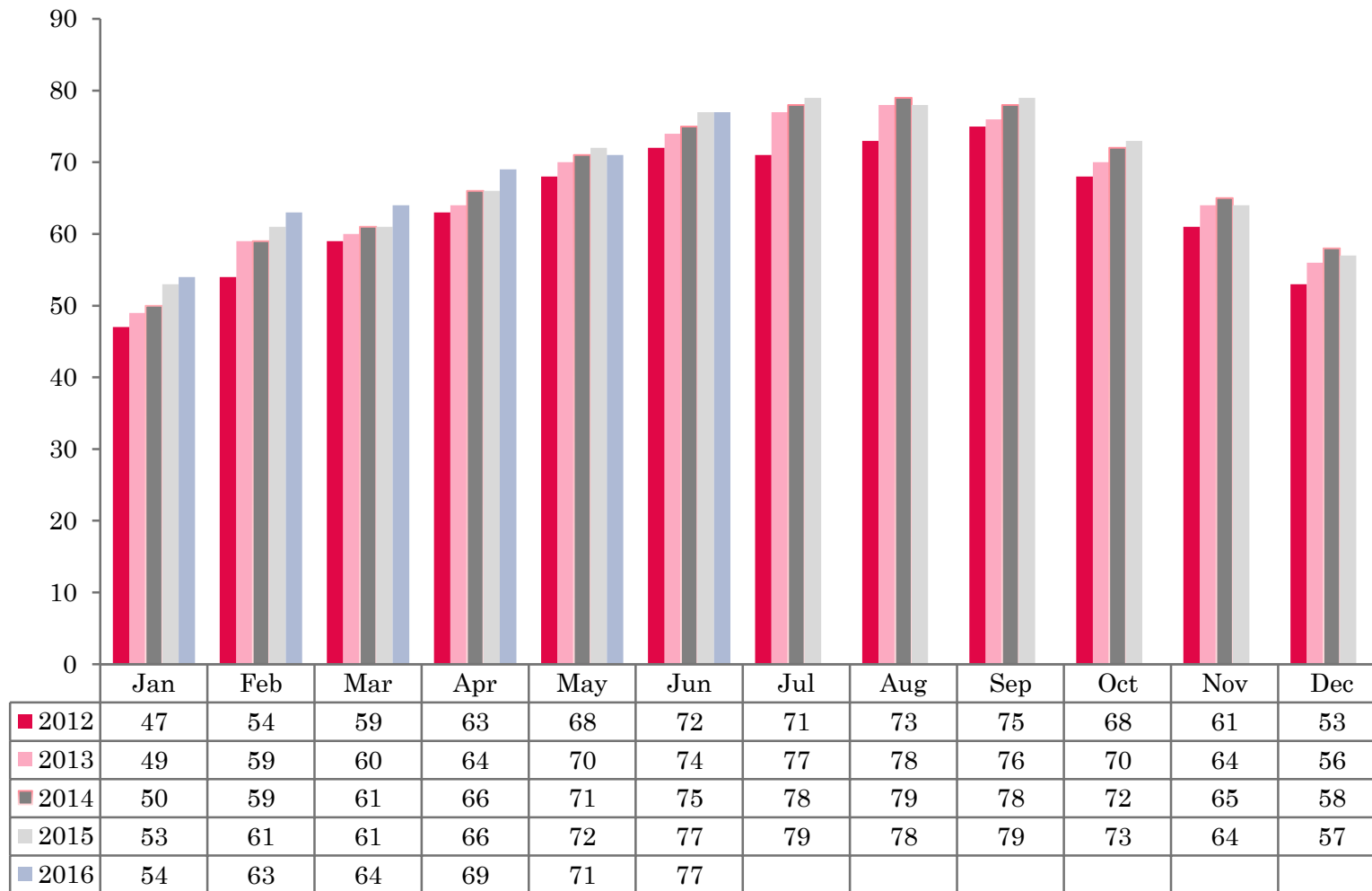
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2012 - 2016



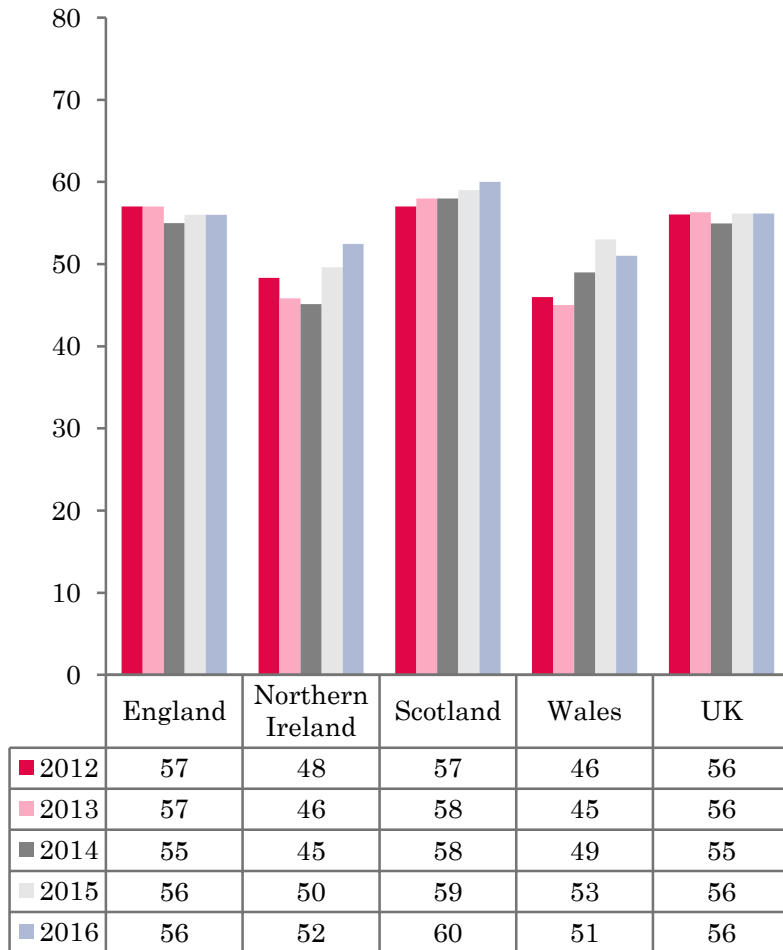
# UK BEDROOM OCCUPANCY 2012 - 2016



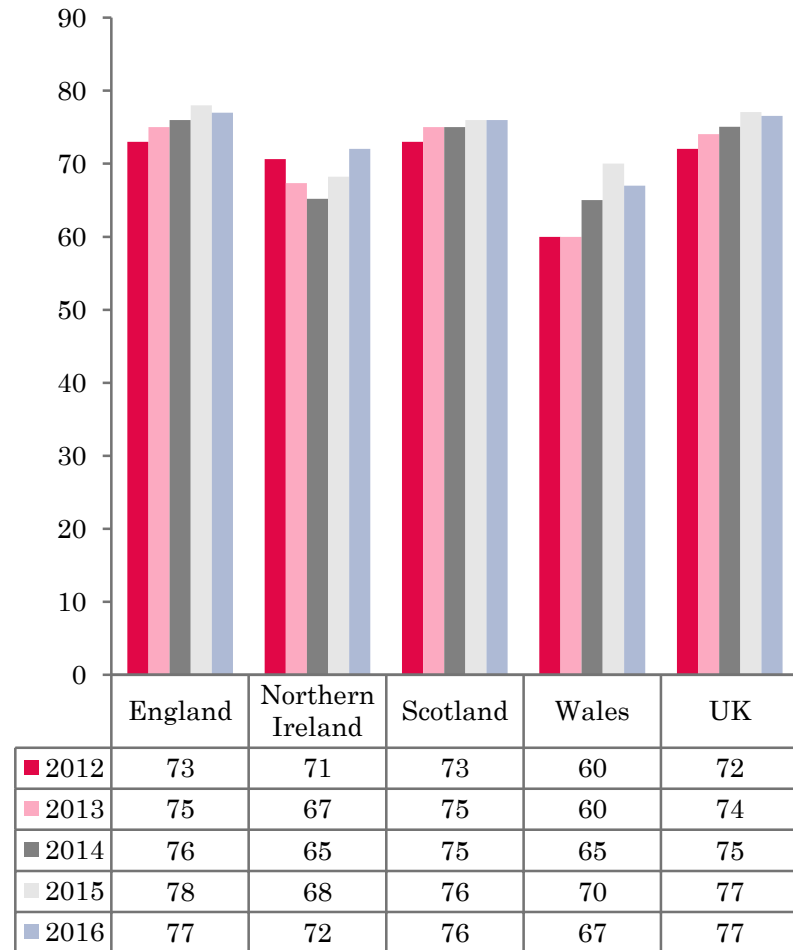
- ❖ 2,437 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ Both UK bedspace occupancy and UK room occupancy had remained flat when compared to the same period the previous year (56% and 77% respectively).



## NATIONAL BEDSPACE OCCUPANCY JUNE 2012-2016



## NATIONAL ROOM OCCUPANCY JUNE 2012-2016



- Both room and bedspace occupancy during June 2016 had remained flat when compared with the same month in 2015.
- Bedspace and room occupancy levels in England mirrored the UK, remaining flat, when compared with the same period the previous year.
- Room occupancy levels in Northern Ireland increased by 4% during June 2016, up to 72%. Bed occupancy increased by 2% when compared to June 2015.
- Wales saw a fall in both measures of occupancy during June, with room occupancy down 3%, from 70% to 67%, with bedspace occupancy also down, by 2% when compared to the same period in 2015.
- Bedspace occupancy levels across Scotland remained flat (-1%) during this month when compared to the same period last year, room occupancy also remained flat during this period.
- 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 June 2015, whilst Northern Ireland increased by 4%. (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: June 2014 - 2016**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	55	56	56	76	78	77	1944	1861	1787
Northern Ireland	45	50	52	65	68	72	166	186	169
Scotland	58	59	60	75	76	76	304	293	262
Wales	49	53	51	65	70	67	117	214	219
<b>UK</b>	55	56	56	75	77	77	2531	2554	2437

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

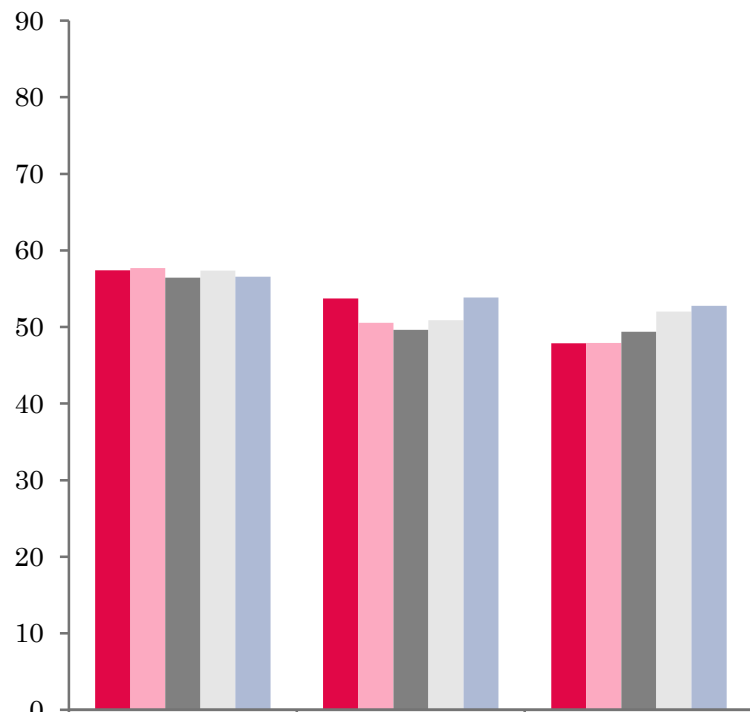
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	43	46	47	9	7	5	14	13	9	17	13	9	1944	1861	1787
Northern Ireland	21	22	20	24	28	32	46	45	44	53	56	62	166	186	169
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	304	293	262
Wales	43	45	46	5	4	4	**	**	**	10	8	8	117	214	219
<b>UK</b>	42	45	47	9	7	5	15	14	9	17	14	10	2531	2554	2437

\*\* FIGURES NOT AVAILABLE



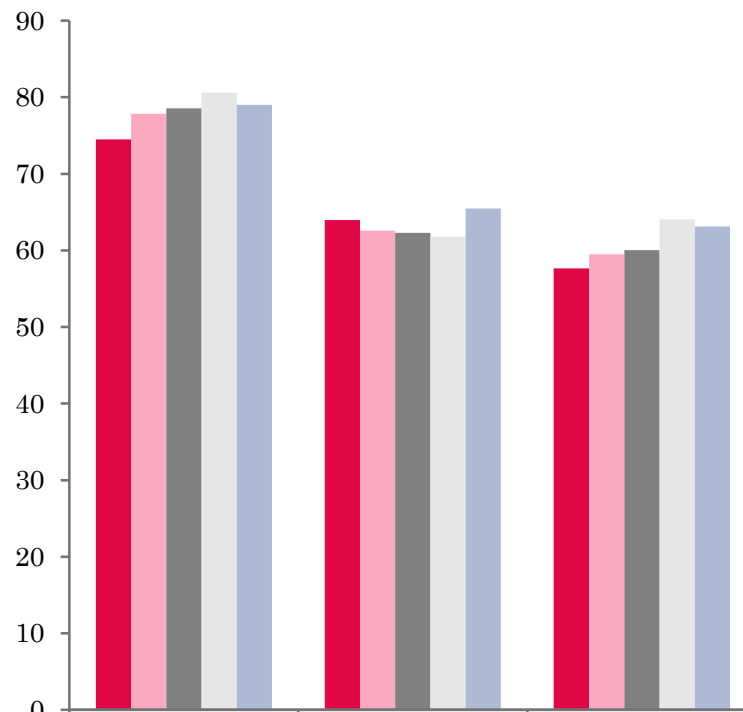


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JUNE 2012-2016



	Hotels	Guesthouses	B&Bs
2012	57	54	48
2013	58	51	48
2014	56	50	49
2015	57	51	52
2016	57	54	53

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION JUNE 2012-2016



	Hotels	Guesthouses	B&Bs
2012	75	64	58
2013	78	63	59
2014	79	62	60
2015	81	62	64
2016	79	65	63



- Bed occupancy levels in both hotels and B&B's remained flat when compared to June 2015. Guesthouse bed occupancy fared better, with a 3% increase on last years figures. Room occupancy levels in the hotel sector fell by 2% with B&Bs remaining on a par with occupancy levels in June 2015. Guesthouses room occupancy increased by 3% when compared to the same month in 2015.
- At the UK level, bed occupancy levels had remained flat in five out of the six size bandings when compared with June 2015. The only decrease was in the 26-50 size banding, down by 2%. Room occupancy across the size bandings sector either decreased or remained flat during June 2016. The 4-10, 26-50 and 51-100 size categories all remained flat, with the remaining size bandings all witnessing a fall in room occupancy levels during June 2016, down by 2% respectively.
- Bedspace occupancy levels in City/large towns was down 2% during June 2016, with all other locations remaining flat during this month. Room occupancy levels in both City/large towns and seaside locations fell by 2% and 3% respectively during June when compared to the same period last year. Small towns and Countryside/village locations remained flat when compared to June 2015.
- Three out of the five tariff bands remained flat in bedspace occupancy during June 2016. The £20.00-£29.99, £40.00-£49.99 and the >£60.00 bandings all remained on par with the previous year. Bed occupancy in the £30.00-£39.99 tariff band decreased by 2%, with the £50.00-£59.00 tariff band witnessing a 7% fall in bed occupancy during 2016. Room occupancy levels across nearly all tariff bands decreased during June 2016, with only the >£60.00 tariff band remaining flat. The largest fall in room occupancy was in the £50.00-£59.99 banding, where levels fell by 5% when compared to June 2015.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	56	57	56	79	81	79	1477	1456	1441
Northern Ireland	54	58	58	74	79	82	70	77	73
Scotland	60	60	63	79	81	81	210	206	194
Wales	54	55	54	72	74	72	60	167	168
<b>UK</b>	56	57	57	79	81	79	1817	1906	1876
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	50	51	54	63	62	66	183	156	132
Northern Ireland	29	25	34	59	37	50	18	20	21
Scotland	55	56	58	65	66	67	40	33	29
Wales	37	45	46	45	56	52	20	21	24
<b>UK</b>	50	51	54	62	62	65	261	230	206
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	50	53	54	61	66	65	284	249	214
Northern Ireland	22	29	35	30	36	42	78	89	75
Scotland	55	56	48	66	66	55	54	54	39
Wales	35	35	38	40	41	41	37	24	27
<b>UK</b>	49	52	53	60	64	63	453	416	355



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: June 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	57	59	59	54	54	54	70	72	72	79	80	80
Northern Ireland	53	54	52	41	42	48	66	69	71	62	64	69
Scotland	61	61	62	57	58	59	72	73	73	77	79	78
Wales	52	59	57	45	48	47	64	70	66	66	69	67
<b>UK</b>	57	59	59	54	54	54	70	72	72	78	79	79



**Table 35: Non-UK Percentages: June 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	13	10	7	17	15	11	16	12	8	19	15	10
Northern Ireland	36	41	41	43	49	48	45	44	47	48	48	53
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	9	8	7	12	9	8
<b>UK</b>	14	11	7	18	16	12	16	13	8	19	15	10

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: June 2014 - 2016**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	45	46	45	144	48	49	51	195	53	56	57	83
Northern Ireland	17	17	23	59	25	33	46	26	38	39	30	30
Scotland	50	53	48	31	59	59	58	49	59	59	62	43
Wales	36	33	40	26	42	49	45	34	52	54	53	24
<b>UK</b>	45	46	45	260	49	50	51	304	54	56	57	180

**Table6: Occupancy Levels by Size: June 2014 - 2016**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	61	59	57	45	56	57	56	26	56	58	57	1294
Northern Ireland	46	53	61	18	54	58	57	23	62	62	66	13
Scotland	60	61	63	46	62	63	66	42	59	59	60	51
Wales	51	52	48	18	62	68	70	9	55	55	54	108
<b>UK</b>	60	59	57	127	57	58	57	100	57	58	57	1466



**Table 7: Occupancy Levels by Size: June 2014 – 2016**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 -3 Rooms</b>				<b>4 – 10 Rooms</b>				<b>11 – 25 Rooms</b>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	54	58	56	144	60	62	63	195	69	71	69	83
Northern Ireland	24	24	31	59	48	41	54	26	53	56	57	30
Scotland	62	62	56	31	67	69	67	49	74	75	78	43
Wales	43	39	41	26	52	60	54	34	60	63	63	24
<b>UK</b>	54	57	55	375	60	63	63	304	69	71	69	180

**Table 7: Occupancy Levels by Size: June 2014 - 2016**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 – 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	75	75	75	45	76	79	79	26	82	84	82	1294
Northern Ireland	66	70	77	18	75	78	79	23	80	85	89	13
Scotland	78	80	83	46	82	82	83	42	86	87	84	51
Wales	66	71	64	18	75	79	79	9	86	84	81	108
<b>UK</b>	75	75	75	127	77	79	79	100	83	84	82	1466



**Table 8: Occupancy Levels by Location Type: June 2014 - 2016**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	51	55	55	162	59	59	57	1010	50	52	52	345	53	55	56	270
Northern Ireland	46	44	49	45	54	61	63	57	32	32	35	46	22	23	20	21
Scotland	62	60	62	31	60	61	62	114	49	53	57	58	60	60	56	59
Wales	58	59	57	34	43	53	47	9	58	55	55	11	39	44	45	60
<b>UK</b>	53	56	56	272	58	59	57	1190	50	52	52	460	53	55	55	410

**Table 8: Occupancy Levels by Location Type: June 2014 - 2016**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	68	74	71	162	83	84	81	1010	72	74	75	345	67	71	69	270
Northern Ireland	62	56	63	45	75	82	83	57	49	44	49	46	32	35	43	21
Scotland	74	76	74	31	83	83	83	114	64	71	74	58	72	71	66	59
Wales	69	71	65	34	79	75	68	9	69	71	57	11	49	54	56	60
<b>UK</b>	69	74	71	272	83	83	81	1190	70	73	74	460	66	69	68	410



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

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	**	**	**	**	32	32	31	22	38	46	43	67
Northern Ireland	**	**	**	**	12	21	16	13	25	21	36	41
Scotland	**	**	**	**	49	42	50	4	49	50	52	37
Wales	**	**	**	**	26	21	32	4	38	38	40	23
<b>UK</b>	**	**	**	**	34	33	32	43	39	46	44	168

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

<b>B: Percentage of Bedspace Occupancy</b>												
	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	53	55	54	101	58	58	51	65	57	57	57	1514
Northern Ireland	34	43	49	30	51	52	25	18	53	60	61	67
Scotland	57	57	54	35	65	64	65	24	61	62	63	160
Wales	39	41	44	19	66	53	45	15	57	58	57	158
<b>UK</b>	52	54	54	185	59	59	52	122	58	58	58	1899

\*\* FIGURES NOT AVAILABLE



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 2014 – 2016 (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>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	**	**	**	**	47	48	42	22	50	57	53	67
Northern Ireland	**	**	**	**	19	25	28	13	31	30	44	41
Scotland	**	**	**	**	58	51	59	4	60	60	62	37
Wales	**	**	**	**	35	33	43	4	48	51	48	23
<b>UK</b>	**	**	**	**	47	47	43	43	51	57	54	168

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 2014 – 2016 (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>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	66	67	65	101	71	71	66	65	78	80	79	1514
Northern Ireland	50	62	66	30	77	74	51	18	74	79	81	67
Scotland	71	72	67	35	76	80	83	24	81	82	81	160
Wales	56	62	62	19	68	66	59	15	74	76	73	158
<b>UK</b>	66	67	65	185	72	72	67	122	78	80	79	1899

\*\* 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)

