



UNITED KINGDOM OCCUPANCY SURVEY

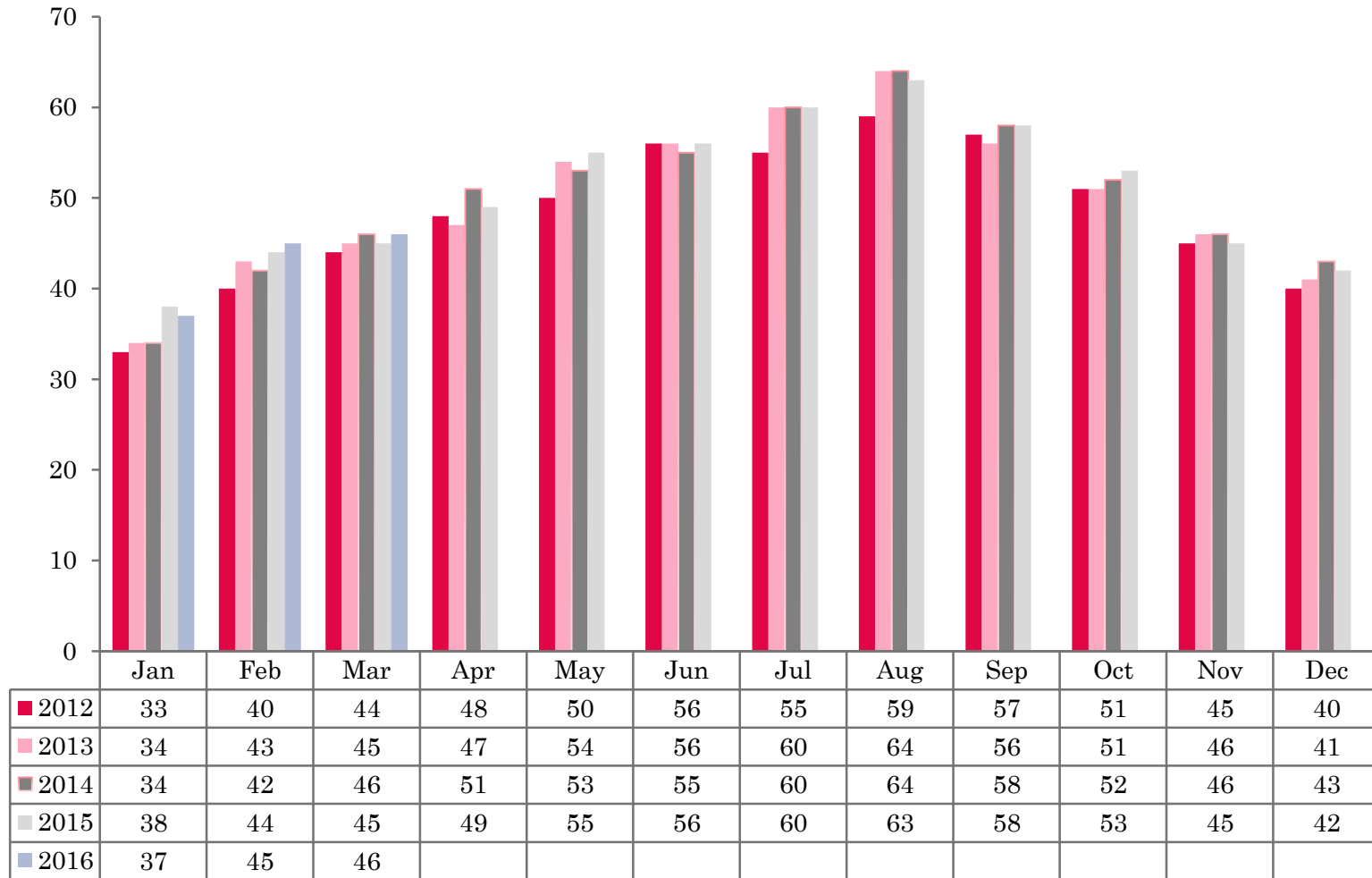
Serviced Accommodation Summary Report
March 2016

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



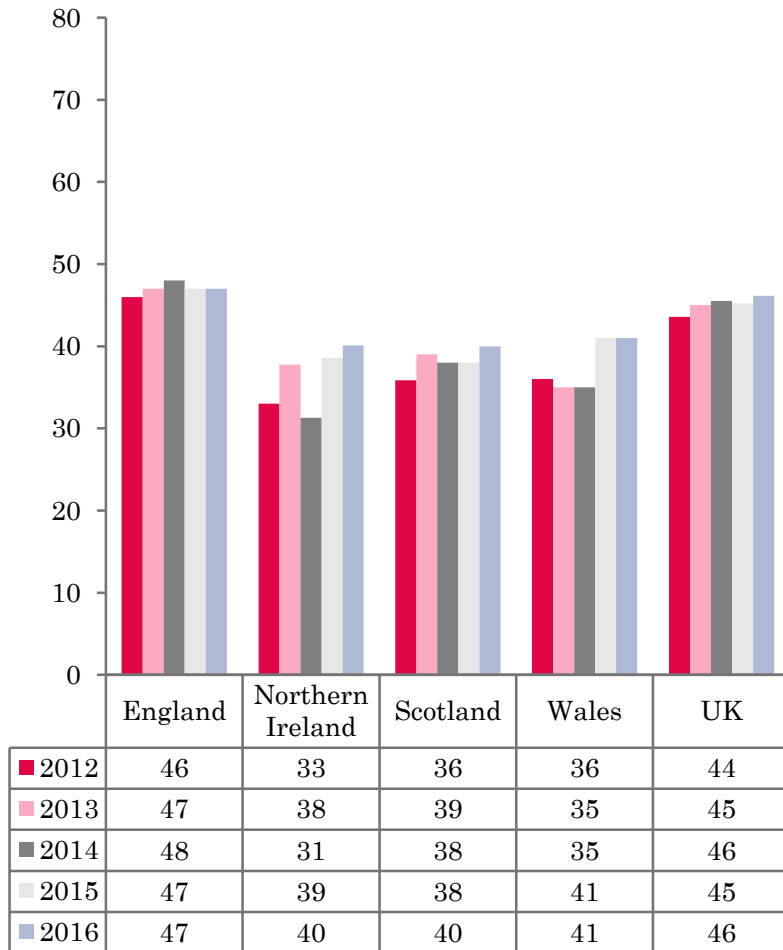
UK BEDROOM OCCUPANCY 2012 - 2016



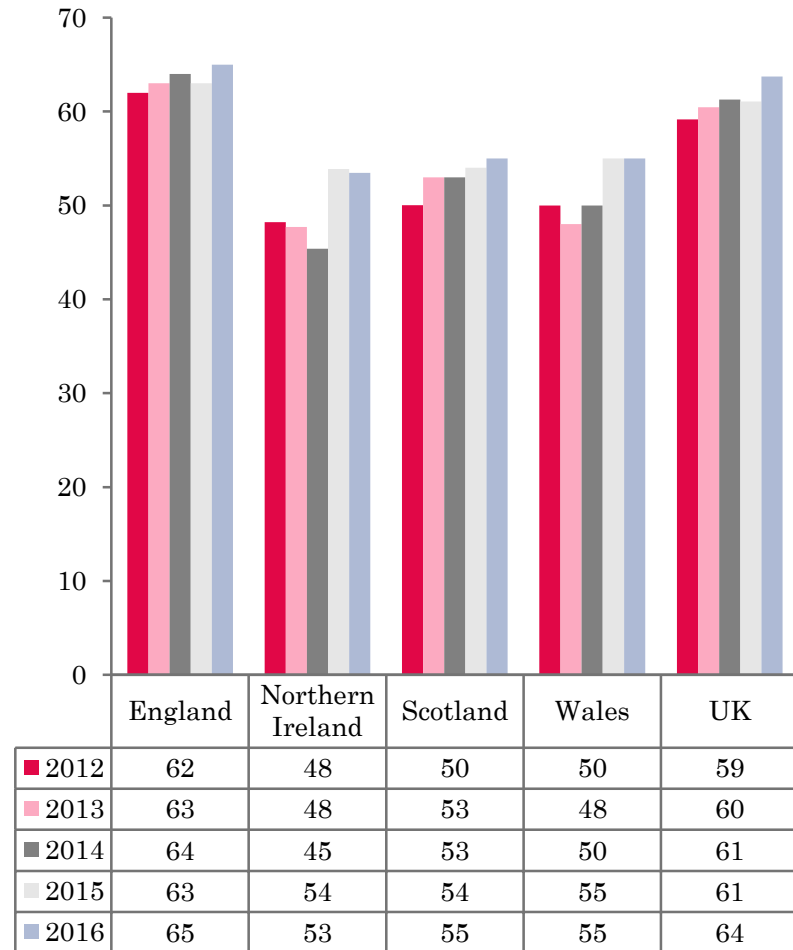
- ❖ 2,456 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace occupancy levels (46%) had remained flat when compared to the same period the previous year. UK room occupancy had increased by 3%, up to 64% when compared to March 2015.



NATIONAL BEDSPACE OCCUPANCY MARCH 2012-2016



NATIONAL ROOM OCCUPANCY MARCH 2012-2016



- UK bedspace occupancy during March 2016 remained flat (46%) when compared with the same month in 2015. Room occupancy increased by 3%, up from 61% in March 2015 to 64% in 2016.
- Bedspace occupancy levels in England remained flat at 47% during March 2016. Room occupancy had increased, up to 65%, a 2% increase when compared with March 2015.
- Room occupancy levels in Northern Ireland remained flat (-1%) during March 2016, whilst bed occupancy also remained flat (+1%) when compared to the same period in 2015.
- Wales saw no change in both measures of occupancy during March, with both room and bedspace occupancy remaining flat compared to the same period in 2015.
- Bedspace occupancy levels across Scotland increased during March 2016, up to 40%, an increase of 2% on March 2015. Room occupancy remained flat (+1%) during this period.
- 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 March 2015, whilst Northern Ireland fell by 2%. (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: March 2014 - 2016

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	48	47	47	64	63	65	1928	1869	1811
Northern Ireland	31	39	40	45	54	53	170	198	172
Scotland	38	38	40	53	54	55	292	271	260
Wales	35	41	41	50	55	55	111	209	213
UK	46	45	46	61	61	64	2501	2547	2456

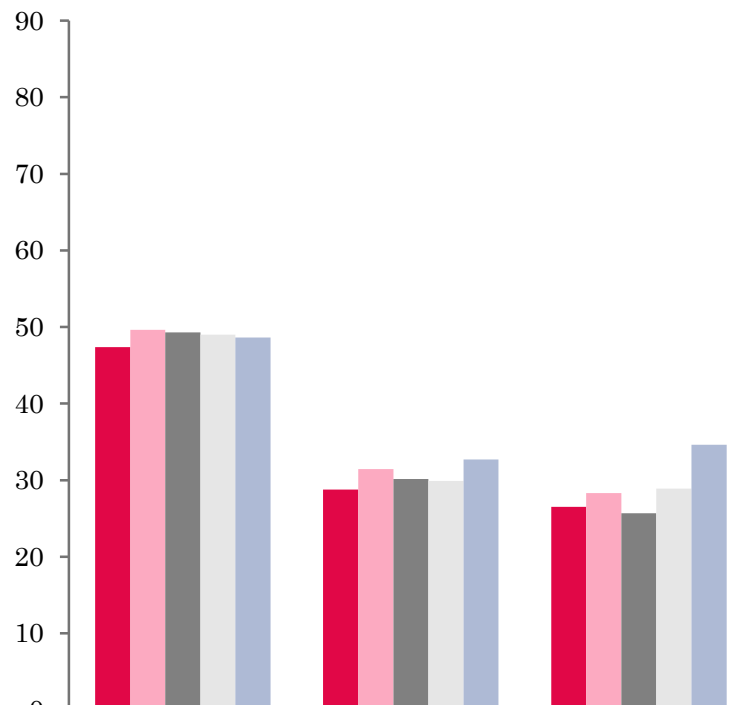
Table 2: UK/Non UK Occupancy Levels March 2014 – 2016 (see note 5a and 5b Slide 19)

	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	31	34	33	3	3	4	6	6	7	9	8	10	1928	1869	1811
Northern Ireland	18	18	21	14	21	19	42	32	32	44	54	49	170	198	172
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	292	271	260
Wales	31	31	31	2	1	2	**	**	**	5	3	5	111	209	213
UK	31	33	33	3	3	4	7	7	7	10	9	10	2501	2547	2456

** FIGURES NOT AVAILABLE

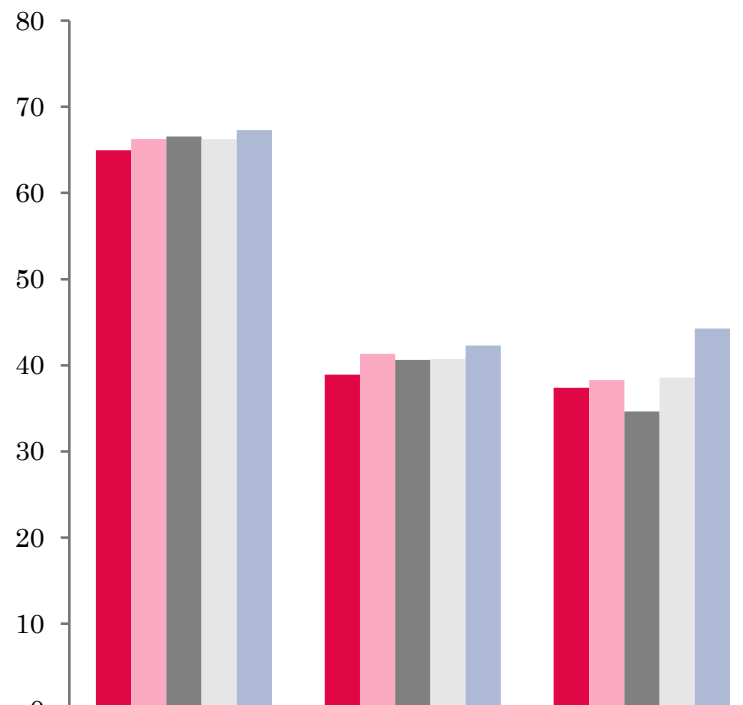


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MARCH 2012-2016

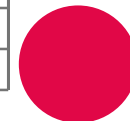


	Hotels	Guesthouses	B&Bs
2012	47	29	27
2013	50	31	28
2014	49	30	26
2015	49	30	29
2016	49	33	35

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



	Hotels	Guesthouses	B&Bs
2012	65	39	37
2013	66	41	38
2014	67	41	35
2015	66	41	39
2016	67	42	44



- Bed and room occupancy levels in the hotel sector remained flat during March 2016. Guesthouse room occupancy remained flat when compared to March 2015, with bed occupancy up 3% on the same period last year. B&B's bed occupancy levels increased by a healthy 6% compared to the same period in 2015, with room occupancy levels also doing well this month, up by 5%.
- At the UK level, bed occupancy levels in three out of the six size bands had increased when compared to the same month in 2015. The largest increase in bed occupancy levels was found in the 1-3 size banding, where occupancy was up by 4% when compared to March 2015. All other size bandings remained flat with the exception of the 51-100 size banding which fell by 8% during this month when compared to the same period the previous year. Room occupancy in both the 1-3 and 4-10 size bandings increased by 4% respectively, when compared to March 2015. All other size bandings remained flat in room occupancy during this month, with the 51-100 size bandings seeing a decrease of 3% when compared to the same period in 2015.
- Bedspace occupancy remained flat in both the seaside and city/large town location types compared with the same month in 2015. Both small town and countryside/village bedspace occupancy levels increased, up by 2% and 5% respectively when compared to the same period in 2015. Room occupancy remained flat in City/large town locations, with seaside, small town and countryside/village locations seeing an increase in room occupancy during this month. The largest of these was in the seaside location where levels went up by 7% when compared to March 2015.
- Both the £20.00-£29.99 and £30.00-£39.99 tariff bands witnessed an increase in bed occupancy during March 2016, up by 3% on the same period in 2015. All other tariff bands remained flat in March when compared to the same period the previous year. Room occupancy levels across all tariff bands remained flat when compared with the same month in 2015.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	51	50	49	68	67	68	1464	1467	1457
Northern Ireland	39	47	48	54	65	62	79	79	81
Scotland	45	45	46	64	64	63	218	200	204
Wales	40	46	45	57	62	61	65	168	170
UK	49	49	49	67	66	67	1826	1914	1912
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	33	32	34	45	44	44	182	157	134
Northern Ireland	19	16	25	30	25	43	15	23	19
Scotland	21	24	22	25	30	27	33	30	21
Wales	17	21	28	23	28	35	18	21	23
UK	30	30	33	41	41	42	248	231	197
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	28	32	37	38	43	47	282	245	220
Northern Ireland	7	13	16	14	18	23	76	96	72
Scotland	19	18	17	23	23	25	41	41	35
Wales	17	19	22	25	24	26	28	20	20
UK	26	29	35	35	39	44	427	402	347



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: March 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	50	48	52	44	46	44	68	59	63	58	69	66
Northern Ireland	42	45	42	28	32	32	54	55	53	49	49	47
Scotland	42	42	36	34	36	36	51	52	54	54	57	54
Wales	39	47	50	31	36	36	49	55	58	50	55	53
UK	48	47	50	42	44	43	64	58	62	57	66	64



Table 35: Non-UK Percentages: March 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	8	4	6	5	7	9	10	7	8	7	9	11
Northern Ireland	35	32	29	38	34	31	44	36	35	48	40	36
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	4	2	4	6	3	6
UK	9	5	6	6	8	9	10	7	8	8	9	11

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: March 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	21	24	27	145	27	30	33	199	38	38	39	86
Northern Ireland	6	8	10	58	10	17	26	22	28	27	27	33
Scotland	15	14	15	29	26	29	28	39	39	40	40	43
Wales	19	19	24	18	24	26	29	35	38	42	40	24
UK	20	22	26	250	26	29	32	295	38	38	39	186

Table6: Occupancy Levels by Size: March 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	48	45	47	52	56	54	44	26	53	52	52	1291
Northern Ireland	34	42	36	22	40	46	43	22	39	52	57	15
Scotland	46	41	47	51	50	49	51	42	48	50	50	56
Wales	37	42	38	18	46	58	55	10	40	49	50	108
UK	47	44	47	143	54	53	45	100	51	52	52	1470



Table 7: Occupancy Levels by Size: March 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	29	33	36	145	38	42	45	199	53	55	53	86
Northern Ireland	11	12	15	58	16	24	35	22	38	38	42	33
Scotland	21	19	22	29	31	36	35	39	54	53	52	43
Wales	23	22	24	18	31	34	36	35	51	50	49	24
UK	27	30	34	375	36	40	44	295	53	54	53	186

Table 7: Occupancy Levels by Size: March 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	64	62	62	52	60	68	65	26	75	75	74	1291
Northern Ireland	52	55	53	22	56	62	59	22	56	75	71	15
Scotland	65	60	62	51	68	70	70	42	73	74	70	56
Wales	54	59	52	18	63	65	66	10	68	73	74	108
UK	63	61	62	143	61	68	65	100	74	75	74	1470



Table 8: Occupancy Levels by Location Type: March 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	37	39	38	167	57	52	51	1018	41	42	44	358	36	39	42	268
Northern Ireland	25	27	31	48	39	51	48	60	24	22	31	45	12	14	19	19
Scotland	37	39	37	31	46	49	49	113	29	31	29	53	30	28	32	63
Wales	40	42	44	32	38	42	42	8	37	38	39	13	27	31	30	55
UK	37	39	38	278	54	51	51	1199	39	40	42	469	34	36	41	405

Table 8: Occupancy Levels by Location Type: March 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	49	43	51	167	73	74	73	1018	59	62	64	358	48	53	54	268
Northern Ireland	31	36	43	48	54	69	62	60	35	30	41	45	21	26	28	19
Scotland	49	51	49	31	67	70	68	113	44	46	45	53	36	38	42	63
Wales	51	51	48	32	66	59	61	8	49	50	54	13	39	41	41	55
UK	49	44	51	278	71	73	72	1199	56	58	62	469	45	50	52	405

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	**	**	**	**	12	18	21	23	21	19	23	71
Northern Ireland	**	**	**	**	3	9	7	11	8	16	19	39
Scotland	**	**	**	**	25	16	22	3	18	21	18	33
Wales	**	**	**	**	5	16	6	3	21	25	24	17
UK	**	**	**	**	13	17	20	40	20	20	23	160

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	31	33	33	103	38	37	39	64	51	49	49	1518
Northern Ireland	27	26	27	34	36	51	36	13	37	47	47	75
Scotland	28	32	26	30	44	43	43	25	45	45	48	168
Wales	25	26	33	19	39	36	40	17	40	46	46	157
UK	30	32	32	186	39	38	39	119	49	48	49	1918

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	**	**	**	**	23	30	27	23	32	28	30	71
Northern Ireland	**	**	**	**	5	12	15	11	11	22	25	39
Scotland	**	**	**	**	34	18	32	3	27	31	25	33
Wales	**	**	**	**	9	24	8	3	29	32	33	17
UK	**	**	**	**	23	28	27	40	31	29	30	160

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	41	45	45	103	49	50	51	64	68	69	69	1518
Northern Ireland	40	39	44	34	44	67	46	13	55	64	62	75
Scotland	41	46	40	30	60	61	62	25	63	63	64	168
Wales	44	46	50	19	52	41	52	17	58	62	59	157
UK	41	45	45	186	51	52	52	119	66	68	68	1918

** 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)

