



# UNITED KINGDOM OCCUPANCY SURVEY

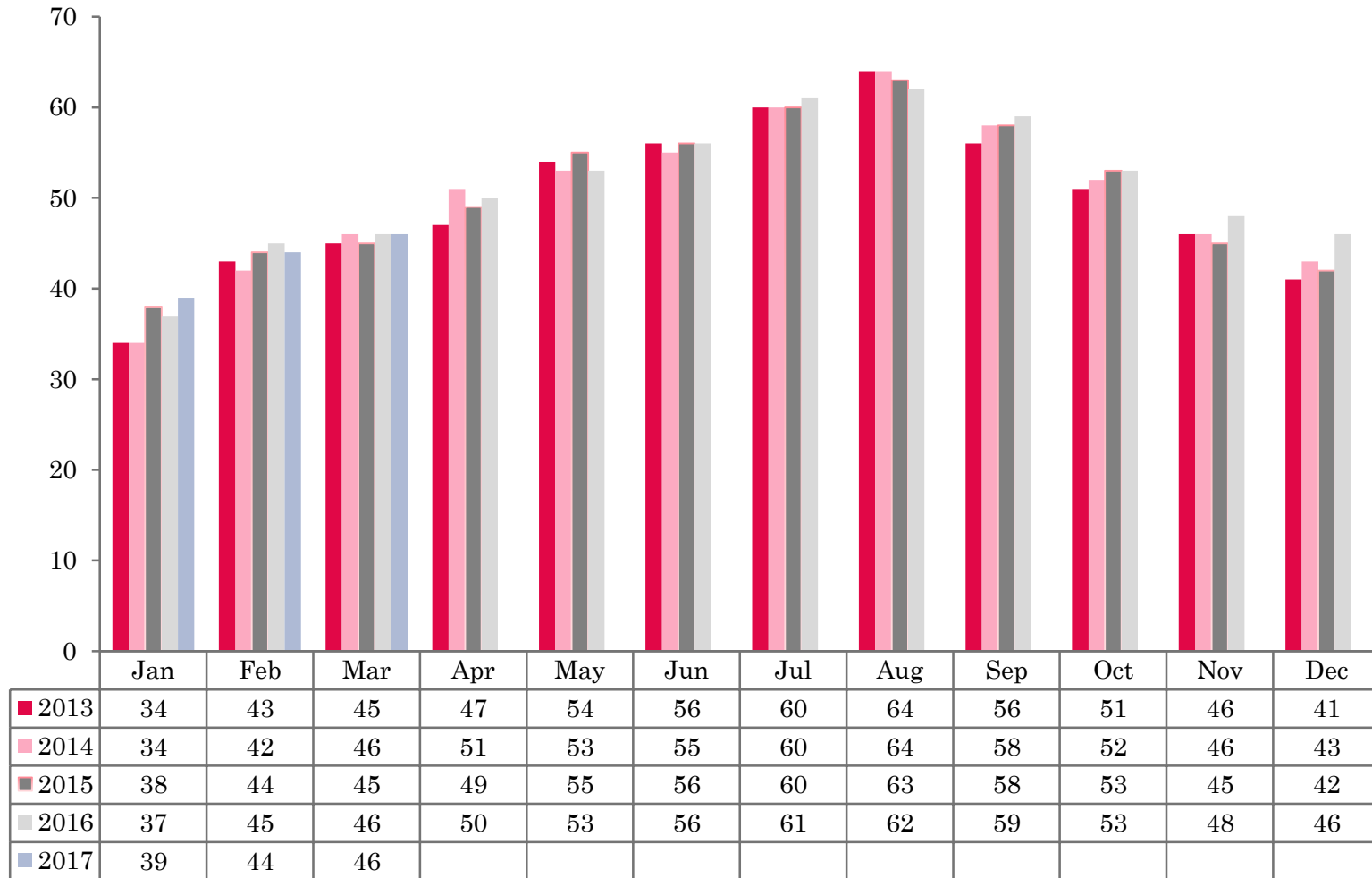
Serviced Accommodation Summary Report  
March 2017

# UK OCCUPANCY SURVEY

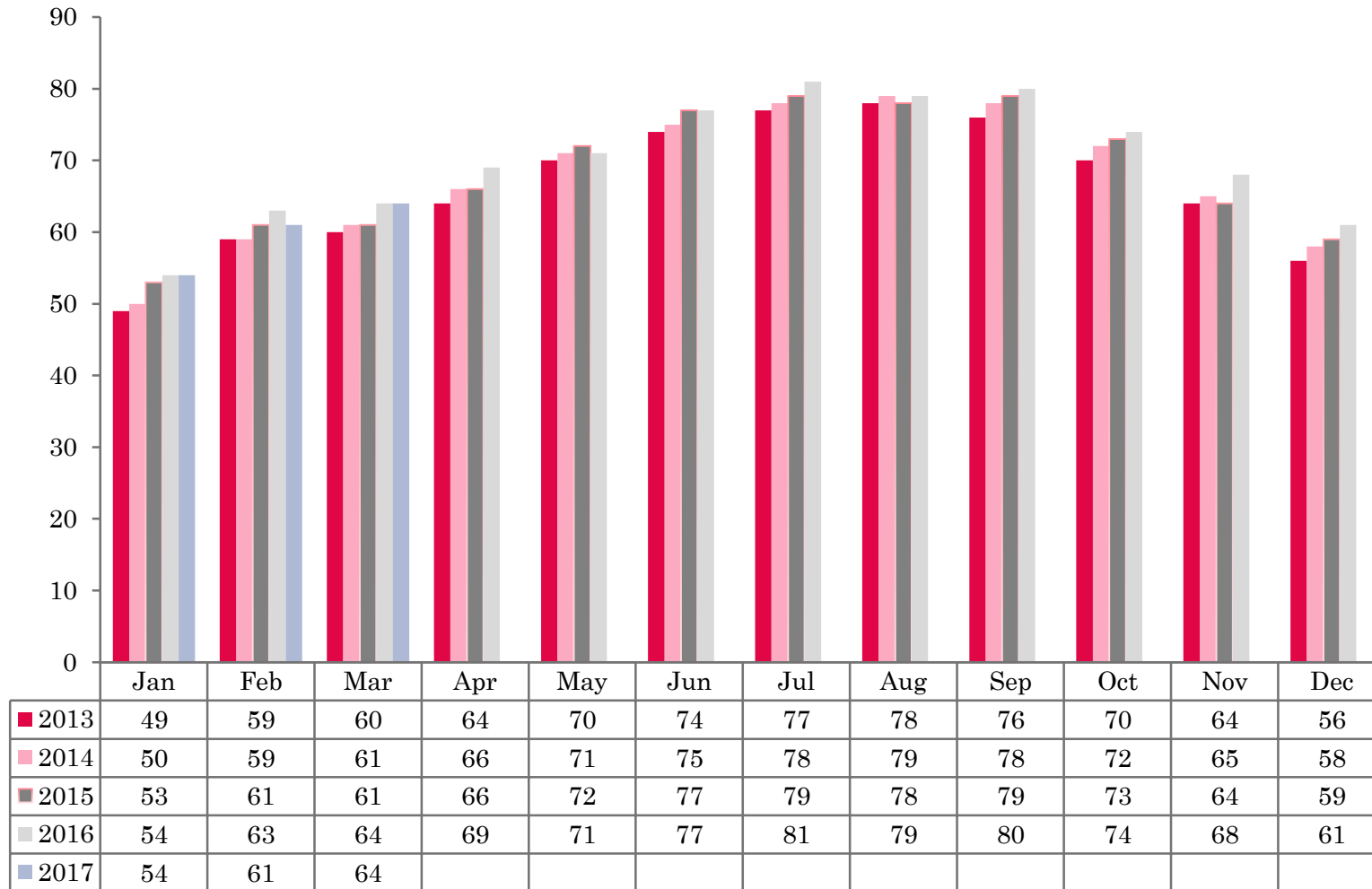
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2013 - 2017



# UK BEDROOM OCCUPANCY 2013 - 2017



- ❖ 2,297 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 remained flat at 46% when compared to the same period the previous year. Room occupancy levels in the UK were at 64% during March 2017, remaining static when compared with 2016 data.



- Both room and bedspace occupancy levels in the UK remained flat during March 2017, when compared with the same period the previous year.
- Both room and bedspace occupancy levels in England remained flat, at 66% and 47% (+1% respectively), when compared with the same period in 2016.
- Room occupancy levels in Northern Ireland remained flat during March 2017, at 54%. Bed occupancy also remained flat at 40%, the same level as March 2016.
- Room occupancy in Wales remained flat during March 2017, at 55%. Bedspace occupancy also remained flat at 41%, when compared to the same period the previous year.
- Occupancy levels across Scotland fell during March 2017 when compared to the same period in 2016. Room occupancy had fallen by 4% whilst bedspace occupancy decreased by 6% compared to the same month the previous year.
- 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, remaining static compared to 2016 data. Northern Ireland increased by 3% when compared with February 2016, whilst Wales 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: March 2015 – 2017**

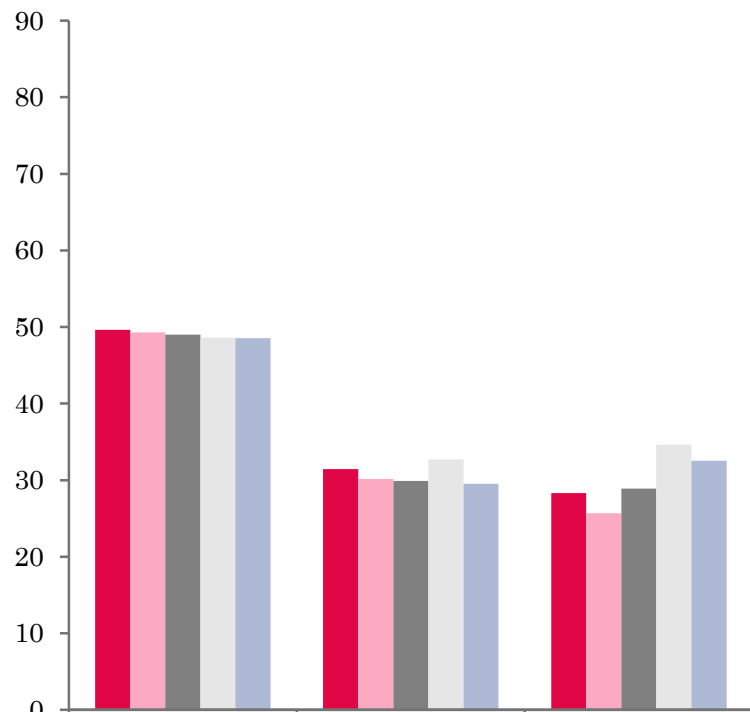
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	47	47	47	63	65	66	1869	1811	1731
Northern Ireland	39	40	40	54	53	54	198	172	189
Scotland	38	40	34	54	55	51	271	260	179
Wales	41	41	41	55	55	55	209	213	198
<b>UK</b>	45	46	46	61	64	64	2547	2456	2297

**Table 2: UK/Non UK Occupancy Levels March 2015 – 2017 (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		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	34	33	31	3	4	4	6	7	7	8	10	11	1869	1811	1731
Northern Ireland	18	21	16	21	19	24	32	32	34	54	49	60	198	172	189
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	271	260	179
Wales	31	31	32	1	2	1	**	**	**	3	5	3	209	213	198
<b>UK</b>	33	33	31	3	4	4	7	7	7	9	10	11	2547	2456	2297

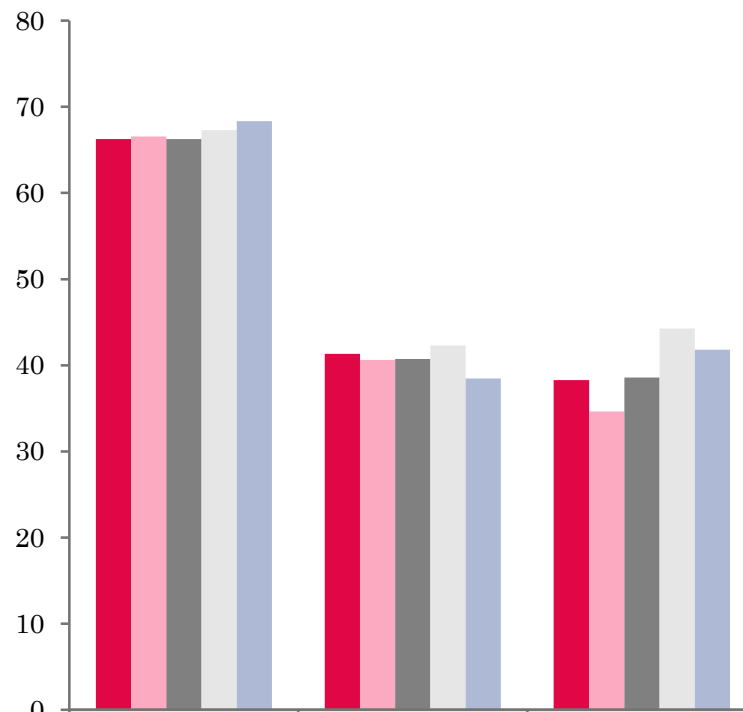


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MARCH 2013-2017



	Hotels	Guesthouses	B&Bs
2013	50	31	28
2014	49	30	26
2015	49	30	29
2016	49	33	35
2017	49	30	33

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION MARCH 2013-2017



	Hotels	Guesthouses	B&Bs
2013	66	41	38
2014	67	41	35
2015	66	41	39
2016	67	42	44
2017	68	38	42





- Both room and bedspace occupancy levels in hotel establishments in the UK remained flat (+1%) during March 2017 compared to the same period in 2016. The guesthouse sector fared worst this month with decreases in both bed occupancy, down 3% during this month, and room occupancy down by 4% when compared to March 2016. B&B establishments saw a small change in both measures of occupancy during March compared to 2016 data, with both room and bed down 2% respectively on March 2016.
- At the UK level, bed occupancy levels had increased in only the >100 size band when compared with March 2016, up by 2%. The 1-3 size band remained flat, with all other size bands decreasing in bed occupancy levels this month, the largest of these was in the 4-10 and 51-100 size bands which saw bed occupancy levels fall by 5% when compared with March 2016. Room occupancy levels in the 1-3, 26-50 and 100+ size bandings all increased by 2% respectively when compared with the same period in 2016. The 4-10 size band witnessed the largest fall in room occupancy with levels down 6% on 2016 data.
- Bedspace occupancy in both city/large town and small town locations remained flat during March 2017. Both seaside and countryside/village locations saw an decrease in bed occupancy levels of 3% and 4% respectively during this month. Across all locations, room occupancy remained flat during March 2017 when compared to the same period the previous year.
- Bed occupancy levels remained flat in both the £20.00-£29.99 and >£60.00 tariff bands during March 2017. Bedspace occupancy across all other tariff decreased when compared to 2016 data. a 10% and 4% increase respectively. Room occupancy levels remained flat across all tariff bands, with the exception of the £50.00-£59.99 tariff band which witnessed a fall of 7% when compared to the same period in 2016.



**Table 3: Occupancy Levels by Type of Establishment: March 2015 – 2017**

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	50	49	49	67	68	69	1467	1457	1457
Northern Ireland	47	48	48	65	62	64	79	81	80
Scotland	45	46	45	64	63	64	200	204	86
Wales	46	45	46	62	61	62	168	170	160
<b>UK</b>	49	49	49	66	67	68	1914	1912	1783
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	32	34	30	44	44	39	157	134	105
Northern Ireland	16	25	25	25	43	40	23	19	18
Scotland	24	22	26	30	27	34	30	21	56
Wales	21	28	27	28	35	35	21	23	15
<b>UK</b>	30	33	30	41	42	38	231	197	194
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	32	37	35	43	47	45	245	220	169
Northern Ireland	13	16	15	18	23	20	96	72	91
Scotland	18	17	16	23	25	21	41	35	37
Wales	19	22	13	24	26	15	20	20	23
<b>UK</b>	29	35	33	39	44	42	402	347	320



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: March 2015 – 2017 (see notes 5a & 5b Slide 19)**

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	48	52	42	46	44	50	59	63	61	69	66	68
Northern Ireland	45	42	48	32	32	33	55	53	59	49	47	52
Scotland	42	36	37	36	36	32	52	54	50	57	54	51
Wales	47	50	46	36	36	37	55	58	54	55	53	55
<b>UK</b>	47	50	42	44	43	48	58	62	60	66	64	66



**Table 35: Non-UK Percentages: March 2015 – 2017 (see notes 5a & 5b Slide 19)**

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	4	6	6	7	9	8	7	8	8	9	11	13
Northern Ireland	32	29	32	34	31	36	36	35	42	40	36	44
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	2	4	2	3	6	4
<b>UK</b>	5	6	6	8	9	8	7	8	8	9	11	13

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: March 2015 - 2017**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	24	27	27	106	30	33	28	166	38	39	37	71
Northern Ireland	8	10	13	76	17	26	20	26	27	27	30	31
Scotland	14	15	16	16	29	28	23	50	40	40	40	57
Wales	19	24	16	20	26	29	28	24	42	40	42	21
<b>UK</b>	22	26	26	218	29	32	27	266	38	39	37	180

**Table 6: Occupancy Levels by Size: March 2015 - 2017**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	45	47	45	44	54	44	38	25	52	52	54	1319
Northern Ireland	42	36	45	20	46	43	47	24	52	57	50	12
Scotland	41	47	41	31	49	51	61	17	50	50	53	8
Wales	42	38	41	18	58	55	51	9	49	50	52	106
<b>UK</b>	44	47	45	113	53	45	40	75	52	52	54	1445



**Table 7: Occupancy Levels by Size: March 2015 – 2017**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 -3 Rooms</b>				<b>4 – 10 Rooms</b>				<b>11 – 25 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	33	36	38	106	42	45	39	166	55	53	50	71
Northern Ireland	12	15	18	76	24	35	25	26	38	42	47	31
Scotland	19	22	21	16	36	35	31	50	53	52	53	57
Wales	22	24	16	20	34	36	35	24	50	49	49	21
<b>UK</b>	30	34	36	375	40	44	38	266	54	53	50	180

**Table 7: Occupancy Levels by Size: March 2015 - 2017**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 – 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	62	62	65	44	68	65	59	25	75	74	76	1319
Northern Ireland	55	53	59	20	62	59	65	24	75	71	68	12
Scotland	60	62	55	31	70	70	82	17	74	70	77	8
Wales	59	52	55	18	65	66	61	9	73	74	78	106
<b>UK</b>	61	62	64	113	68	65	61	75	75	74	76	1445



**Table 8: Occupancy Levels by Location Type: March 2015 - 2017**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	39	38	35	144	52	51	51	1014	42	44	43	337	39	42	39	236
Northern Ireland	27	31	32	47	51	48	48	68	22	31	30	51	14	19	13	47
Scotland	39	37	34	32	49	49	52	38	31	29	24	45	28	32	26	64
Wales	42	44	39	28	42	42	48	8	38	39	39	13	31	30	31	46
<b>UK</b>	39	38	35	251	51	51	51	1128	40	42	41	446	36	41	37	393

**Table 8: Occupancy Levels by Location Type: March 2015 - 2017**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	43	51	53	144	74	73	73	1014	62	64	65	337	53	54	53	236
Northern Ireland	36	43	42	47	69	62	64	68	30	41	42	51	26	28	19	47
Scotland	51	49	48	32	70	68	73	38	46	45	37	45	38	42	35	64
Wales	51	48	43	28	59	61	64	8	50	54	53	13	41	41	40	46
<b>UK</b>	44	51	52	251	73	72	73	1128	58	62	62	446	50	52	51	393

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 2015 – 2017 (see note 5a Slide 19)**

**A: Percentage of Bedspace Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	18	21	19	16	19	23	22	51
Northern Ireland	**	**	**	**	9	7	19	9	16	19	18	33
Scotland	**	**	**	**	16	22	26	4	21	18	10	22
Wales	**	**	**	**	16	6	****	2	25	24	25	16
<b>UK</b>	**	**	**	**	17	20	20	29	20	23	21	122

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 2015 – 2017 (see note 5a Slide 19)**

**B: Percentage of Bedspace Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	33	33	31	76	37	39	31	56	49	49	49	1531
Northern Ireland	26	27	25	37	51	36	34	24	47	47	45	86
Scotland	32	26	24	45	43	43	58	26	45	48	40	82
Wales	26	33	34	14	36	40	38	16	46	46	45	150
<b>UK</b>	32	32	30	172	38	39	33	122	48	49	48	1849

\*\* FIGURES NOT AVAILABLE



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 2015 – 2017 (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>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	30	27	26	16	28	30	30	51
Northern Ireland	**	**	**	**	12	15	21	9	22	25	24	33
Scotland	**	**	**	**	18	32	39	4	31	25	14	22
Wales	**	**	**	**	24	8	****	2	32	33	34	16
<b>UK</b>	**	**	**	**	28	27	27	29	29	30	29	122

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 2015 – 2017 (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>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	45	45	43	76	50	51	43	56	69	69	69	1531
Northern Ireland	39	44	37	37	67	46	48	24	64	62	61	86
Scotland	46	40	39	45	61	62	64	26	63	64	59	82
Wales	46	50	52	14	41	52	51	16	62	59	58	150
<b>UK</b>	45	45	43	172	52	52	45	122	68	68	68	1849

\*\* 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 2017 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 2017) 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)

