



UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Summary Report
May 2016

UK OCCUPANCY SURVEY

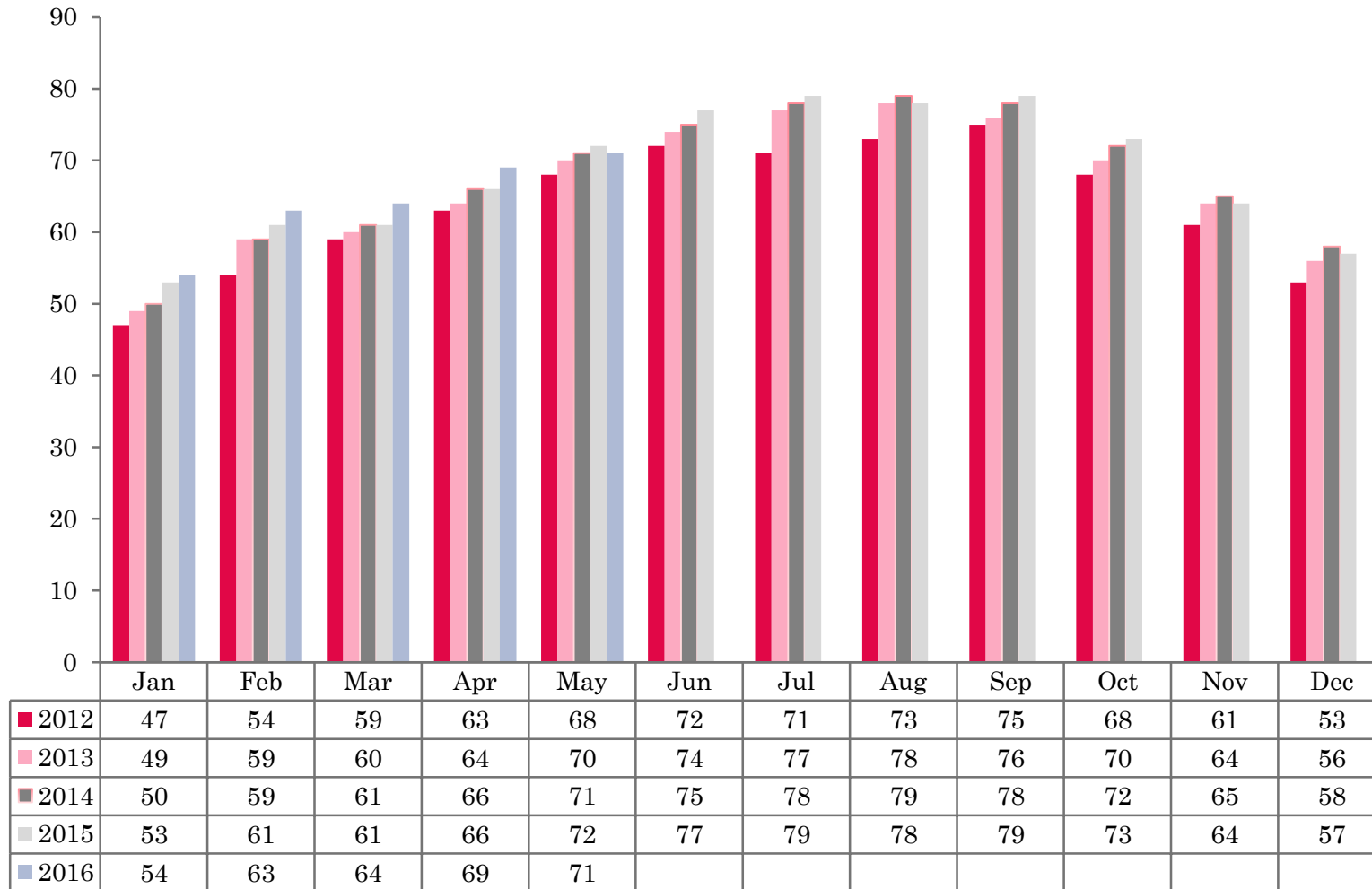
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



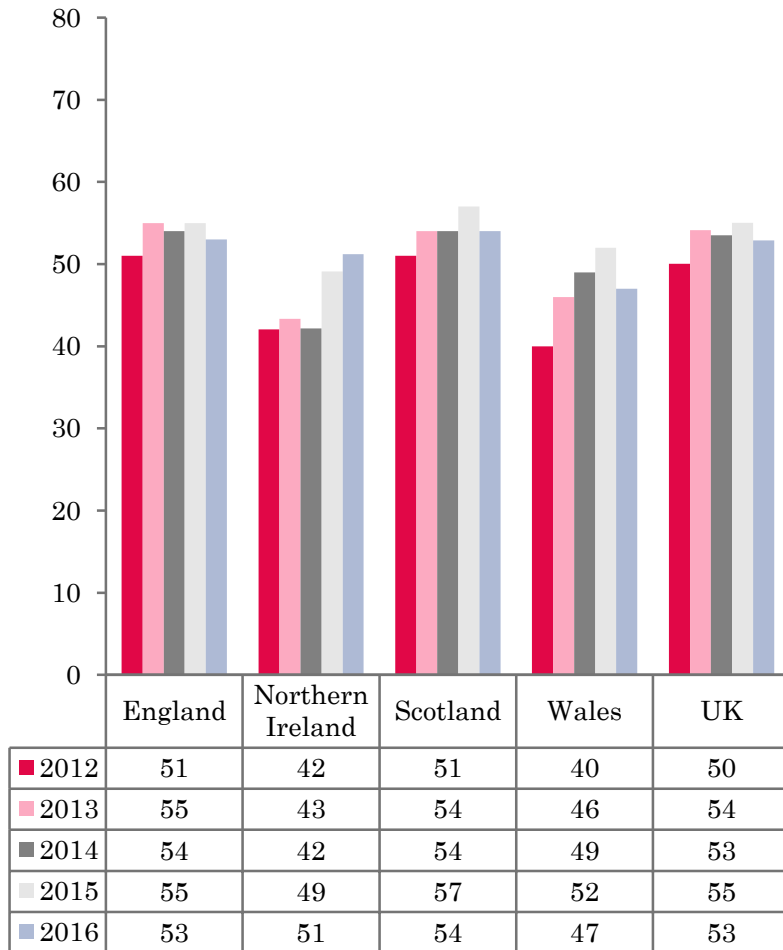
UK BEDROOM OCCUPANCY 2012 - 2016



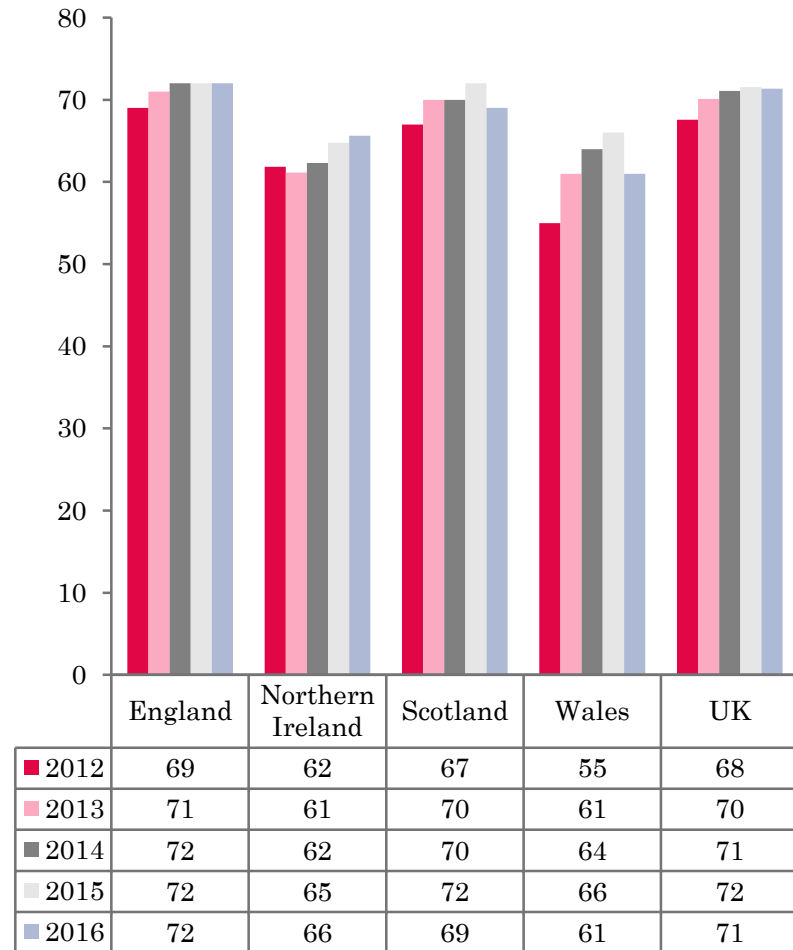
- ❖ 2,460 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace occupancy levels (53%) had seen a fall of 2% when compared to the same period the previous year. UK room occupancy remained flat (-1%) at 71% when compared to May 2015.



NATIONAL BEDSPACE OCCUPANCY MAY 2012-2016



NATIONAL ROOM OCCUPANCY MAY 2012-2016



- UK bedspace occupancy during May 2016 had fallen by 2% when compared with the same month in 2015. Room occupancy remained flat (-1%) compared to May 2015.
- Both bedspace and room occupancy levels in England mirrored the UK, down by 2% during May 2016 for bedspace occupancy with room occupancy remaining flat (-1%) when compared with the same period the previous year.
- Room occupancy levels in Northern Ireland remained flat (+1%) during May 2016, whilst bed occupancy increased by 2% when compared May 2015.
- Wales saw a fall in both measures of occupancy during May, with room occupancy down 5%, from 65% to 61% and bedspace occupancy also down by 5% when compared to the same period in 2015.
- Bedspace occupancy levels across Scotland fell during May 2016, down from 57% in 2015 to 47% this year. Room occupancy also fell by 3% 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 May 2015, whilst Northern Ireland increased by 5%. (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: May 2014 - 2016

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	54	55	53	72	72	72	1951	1868	1801
Northern Ireland	42	49	51	62	65	66	172	192	176
Scotland	54	57	54	70	72	69	293	283	263
Wales	49	52	47	64	66	61	121	210	220
UK	53	55	53	71	72	71	2537	2553	2460

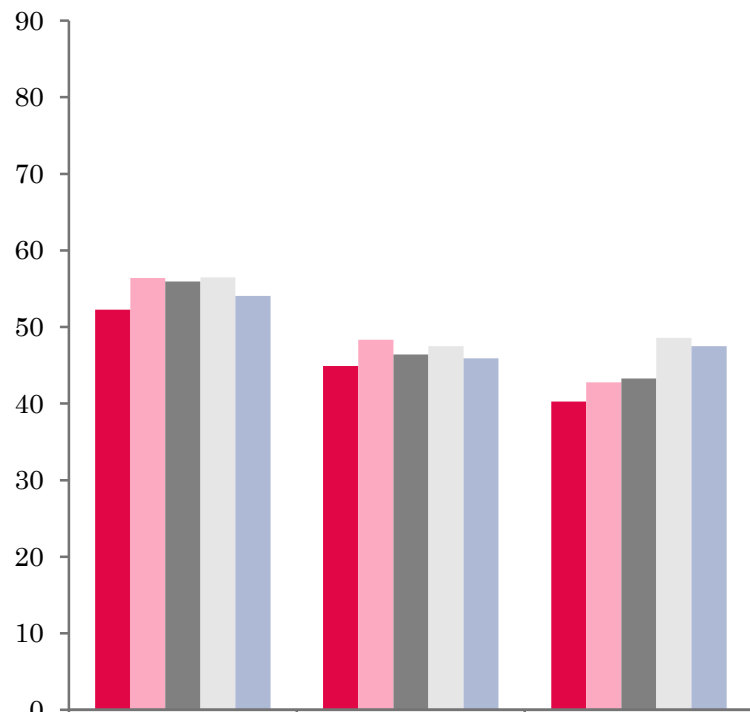
Table 2: UK/Non UK Occupancy Levels May 2014 – 2016 (see note 5a and 5b Slide 19)

	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	41	44	41	7	5	5	11	10	11	14	11	11	1951	1868	1801
Northern Ireland	22	22	19	20	27	32	45	46	40	48	56	63	172	192	176
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	293	283	263
Wales	42	45	40	5	4	3	**	**	**	10	8	8	121	210	220
UK	41	44	41	7	5	5	12	11	11	15	12	12	2537	2553	2460

** FIGURES NOT AVAILABLE

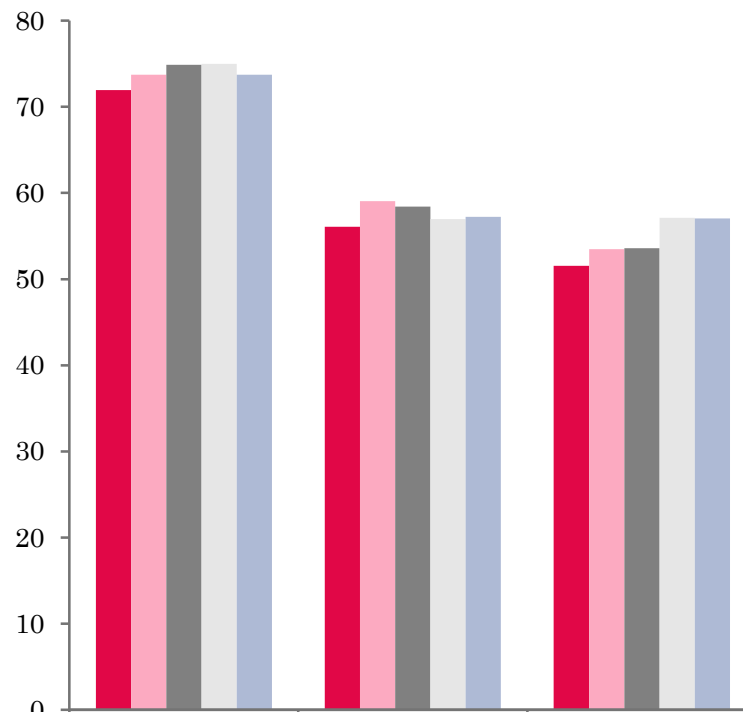


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MAY 2012-2016



	Hotels	Guesthouses	B&Bs
2012	52	45	40
2013	56	48	43
2014	56	46	43
2015	56	47	49
2016	54	46	48

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



	Hotels	Guesthouses	B&Bs
2012	72	56	52
2013	74	59	53
2014	75	58	54
2015	75	57	57
2016	74	57	57



- Bed occupancy levels across all types of establishment remained flat when compared to May 2015. Room occupancy levels saw little movement with hotels falling by 2% and both guesthouses and B&Bs remaining on a par with occupancy levels in May 2015 (-1% respectively).
- At the UK level, bed occupancy levels had fallen or remained flat when compared with May 2015. The biggest decrease was in the 26-50 size banding, down by 6%, whilst the 4-10, 11.25 and 51-100 size bands each fell by 3% respectively. The largest of the size bandings (>100) was down by 2% with only the 1-3 room banding remaining flat (-1%). Only the 51-100 size category witnessed a rise in room occupancy levels during May 2016, up by 2%. Two of the remaining size bands (1-3 and 26-50) fell by 3%, whilst the three remaining size bands remained on a par with the same period the previous year.
- Bedspace occupancy levels in City/large towns and countryside/village both saw a down turn during May 2016 by 3% and 2% respectively. Small town and seaside locations remained flat compared with the same month in 2015. Room occupancy fell in both countryside/village and seaside locations (down 3% respectively). Small towns and city/large towns remained flat when compared to the same period the previous year.
- Four out of the five tariff bands witnessed a decrease in bedspace occupancy during May 2016. The £20.00-£29.99, £30.00-£39.99, £50.00-£59.99 and the >£60.00 bandings all fell by 4% respectively, with only the £40.00-£49.99 tariff band remaining flat. Room occupancy fared little better with the £30.00-£39.99 size band down by 5% from 48% in 2015 to 43% in May 2016. Both the £20.00-£29.99 and £50.00-£59.99 bandings also saw a decrease, falling by 3% respectively. Only the £40.00-£49.99 and the largest tariff band, >£60.00 remained at the same levels when compared with the same period in 2015.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	56	56	54	75	75	74	1476	1463	1447
Northern Ireland	49	58	56	72	76	74	74	82	79
Scotland	57	59	56	76	76	74	208	197	195
Wales	55	56	49	71	71	65	64	167	172
UK	56	56	54	75	75	74	1822	1909	1893
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	47	48	46	60	58	58	189	156	132
Northern Ireland	33	24	36	45	33	45	21	16	18
Scotland	49	51	48	57	59	54	38	34	27
Wales	36	39	41	44	45	49	24	21	22
UK	46	47	46	58	57	57	272	227	199
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	44	49	48	55	58	58	286	249	222
Northern Ireland	20	27	34	28	32	39	77	94	79
Scotland	47	54	47	56	62	55	47	52	41
Wales	31	35	40	36	40	42	33	23	26
UK	43	49	48	54	57	57	443	418	368



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: May 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	59	58	58	50	51	49	71	71	71	72	72	72
Northern Ireland	50	54	54	36	40	41	65	66	65	57	58	58
Scotland	58	61	58	50	53	51	69	71	69	71	73	71
Wales	56	59	56	41	46	52	68	68	64	60	63	58
UK	58	58	58	49	51	49	70	71	71	71	71	71



Table 35: Non-UK Percentages: May 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	9	8	9	14	12	12	12	10	10	15	12	13
Northern Ireland	38	40	38	47	47	45	41	44	47	50	51	54
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	9	3	5	10	4	7
UK	10	9	9	15	13	12	12	11	10	16	13	13

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: May 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	39	41	39	147	45	46	44	200	49	52	50	85
Northern Ireland	19	18	22	66	30	29	49	21	36	40	36	33
Scotland	38	46	47	33	54	58	48	48	58	58	56	43
Wales	35	38	42	25	42	41	40	33	49	56	44	26
UK	38	41	40	271	46	47	44	302	50	53	50	187

Table6: Occupancy Levels by Size: May 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	58	59	53	46	53	50	49	27	58	58	56	1296
Northern Ireland	42	56	55	20	53	56	52	23	49	63	63	13
Scotland	54	58	60	47	57	61	56	39	58	57	56	53
Wales	50	55	45	18	69	66	63	10	55	56	52	108
UK	57	59	53	131	54	53	50	99	58	58	56	1470



Table 7: Occupancy Levels by Size: May 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	47	51	48	147	56	57	57	200	64	64	64	85
Northern Ireland	24	23	28	66	39	34	51	21	44	53	52	33
Scotland	45	55	56	33	64	66	56	48	72	72	72	43
Wales	42	44	43	25	50	49	49	33	60	63	54	26
UK	46	51	48	375	57	57	57	302	65	65	64	187

Table 7: Occupancy Levels by Size: May 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	73	70	68	46	7	67	70	27	80	80	79	1296
Northern Ireland	66	67	68	20	71	74	70	23	81	84	82	13
Scotland	73	75	75	47	76	78	76	39	83	81	77	53
Wales	65	69	57	18	77	74	71	10	83	79	76	108
UK	72	71	68	131	72	69	71	99	81	80	79	1470



Table 8: Occupancy Levels by Location Type: May 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	48	48	48	165	60	60	56	1012	49	50	50	352	51	52	50	272
Northern Ireland	41	42	44	49	49	61	58	59	35	32	34	47	19	22	35	21
Scotland	52	58	55	33	57	59	57	113	50	49	50	54	53	57	50	63
Wales	56	57	50	33	44	46	42	9	56	56	52	13	42	44	41	61
UK	49	50	49	280	58	59	56	1193	49	50	50	466	50	52	50	417

Table 8: Occupancy Levels by Location Type: May 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	65	64	61	165	81	79	78	1012	68	69	70	352	64	65	62	272
Northern Ireland	53	53	56	49	74	78	75	59	46	42	46	47	33	33	45	21
Scotland	64	72	70	33	79	79	76	113	65	65	68	54	63	67	59	63
Wales	66	65	58	33	78	65	61	9	67	70	58	13	53	53	51	61
UK	65	65	62	280	80	78	77	1193	67	68	69	466	63	64	61	417

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	**	**	**	**	30	33	27	21	37	39	35	69
Northern Ireland	**	**	**	**	11	19	12	12	25	20	36	45
Scotland	**	**	**	**	32	****	43	6	45	44	39	32
Wales	**	**	**	**	30	20	21	4	33	36	35	21
UK	**	**	**	**	30	32	28	43	38	39	35	167

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	46	48	48	103	50	49	46	66	56	57	54	1542
Northern Ireland	38	42	46	35	48	56	37	13	48	59	57	71
Scotland	46	51	51	36	57	61	61	24	58	61	57	163
Wales	42	40	45	19	62	54	42	15	56	57	52	161
UK	46	48	48	193	52	51	47	118	56	58	54	1937

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	**	**	**	**	44	42	39	21	49	48	43	69
Northern Ireland	**	**	**	**	13	22	18	12	31	25	42	45
Scotland	**	**	**	**	41	****	31	6	56	55	48	32
Wales	**	**	**	**	41	30	23	4	39	45	43	21
UK	**	**	**	**	43	41	38	43	49	48	43	167

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	57	60	59	103	60	61	60	66	75	75	75	1542
Northern Ireland	52	58	57	35	65	70	51	13	74	76	74	71
Scotland	61	63	66	36	74	76	79	24	76	77	74	163
Wales	60	57	58	19	67	65	56	15	72	72	66	161
UK	58	60	60	193	63	64	61	118	75	75	75	1937

** 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)

