



# UNITED KINGDOM OCCUPANCY SURVEY

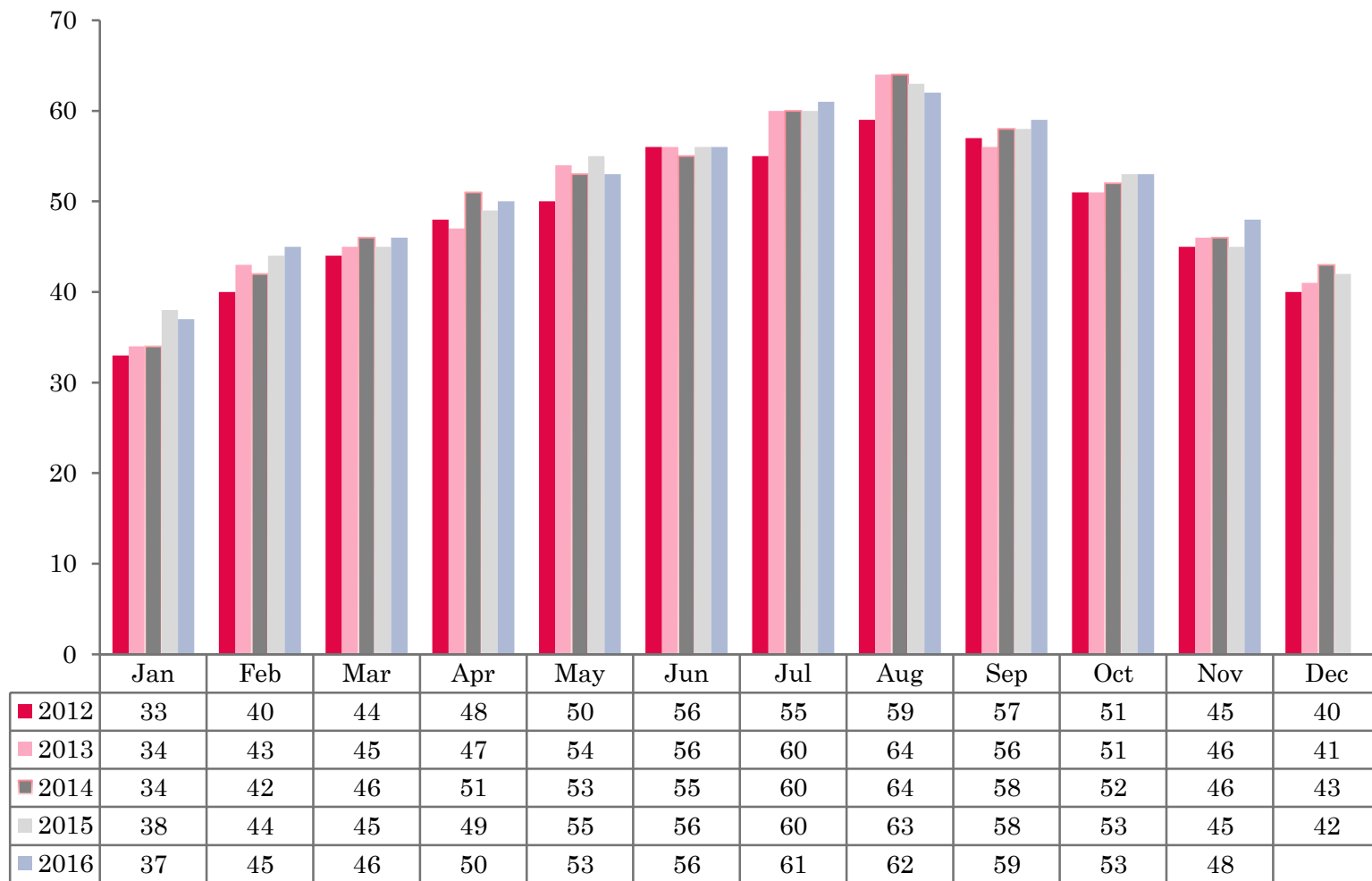
Serviced Accommodation Summary Report  
November 2016

# UK OCCUPANCY SURVEY

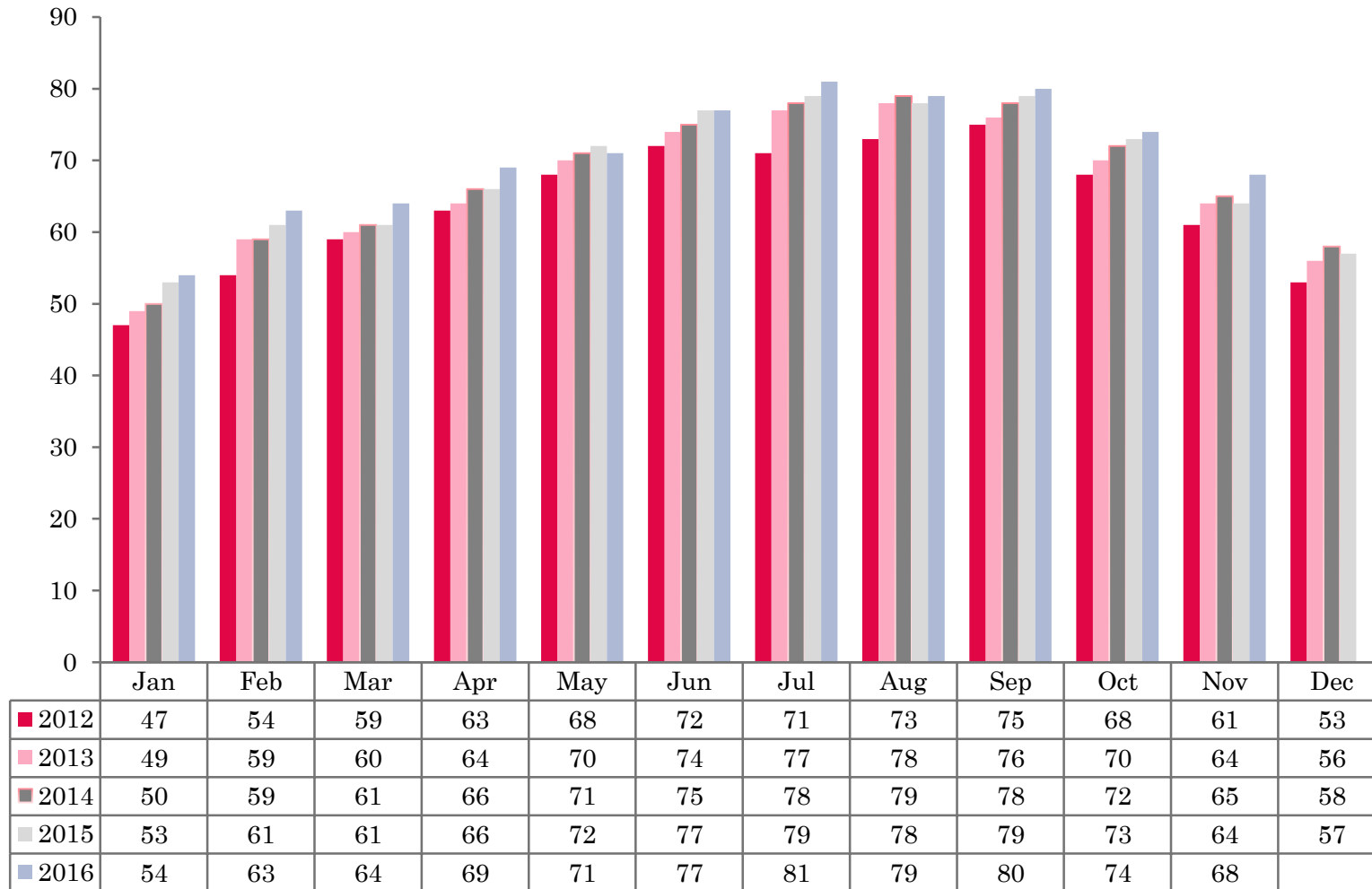
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2012 - 2016



# UK BEDROOM OCCUPANCY 2012 - 2016



- ❖ 2,286 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 increased by 3%, up to 48% when compared to the same period the previous year. Room occupancy levels in the UK during November were at 68%, an increase of 4% compared to November 2015 data.



- Room occupancy had increased by a healthy 4% during November 2016 at 68%, when compared to the same month in 2015. A similar picture was seen in bedspace occupancy where levels rose by 3%, when compared with November 2015.
- Bedspace occupancy levels in England increased by 2% during November 2015, with room occupancy up by 3% when compared with the same period in 2015.
- Both room and bed occupancy levels in Northern Ireland increased by a healthy 11% during November 2016. Room occupancy rose from 46% to 57% and bed occupancy increased from 33% to 44%.
- Room and bedspace occupancy in Wales remained flat during the month of November, when compared to the same period the previous year.
- Both room and bed occupancy levels across Scotland increased during November 2016 when compared to the same period in 2015, an increase of 3% and 2% respectively.
- Across the UK as a whole, bedspace occupancy by non-UK residents had decreased when compared with the previous year. England mirrored the UK, down 2% on 2015 data. Northern Ireland increased by a healthy 10% when compared with November 2015, 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: November 2014 - 2016**

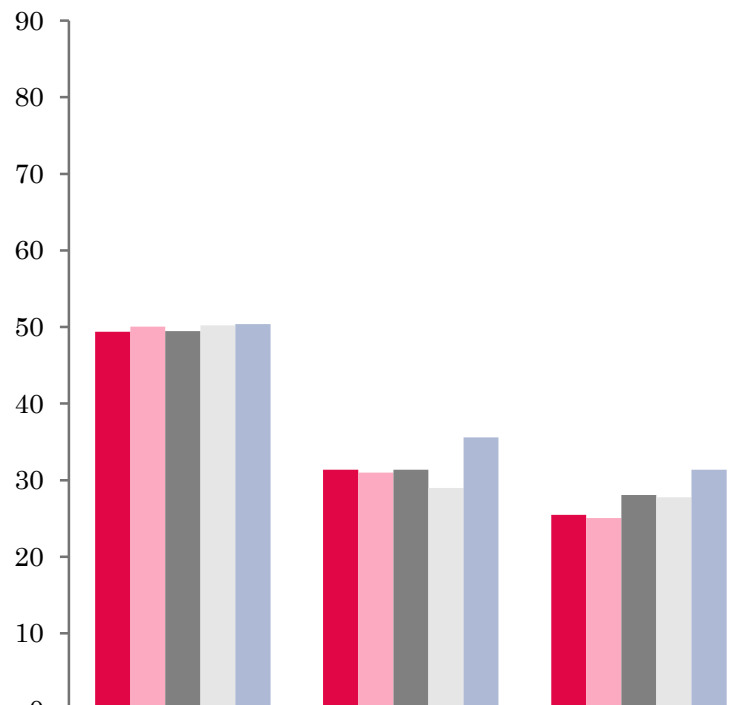
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	48	47	49	68	67	70	1836	1777	1731
Northern Ireland	36	33	44	52	46	57	162	166	128
Scotland	39	37	39	56	53	56	271	254	226
Wales	34	39	40	45	54	55	101	196	201
<b>UK</b>	46	45	48	65	64	68	2370	2393	2286

**Table 2: UK/Non UK Occupancy Levels November 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	33	31	33	2	4	2	5	6	4	6	10	5	1836	1777	1731
Northern Ireland	20	16	17	16	17	27	34	36	35	44	51	61	162	166	128
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	271	254	226
Wales	29	30	29	1	1	1	**	**	**	3	4	4	101	196	201
<b>UK</b>	32	31	33	2	4	2	6	7	4	7	11	6	2370	2393	2286

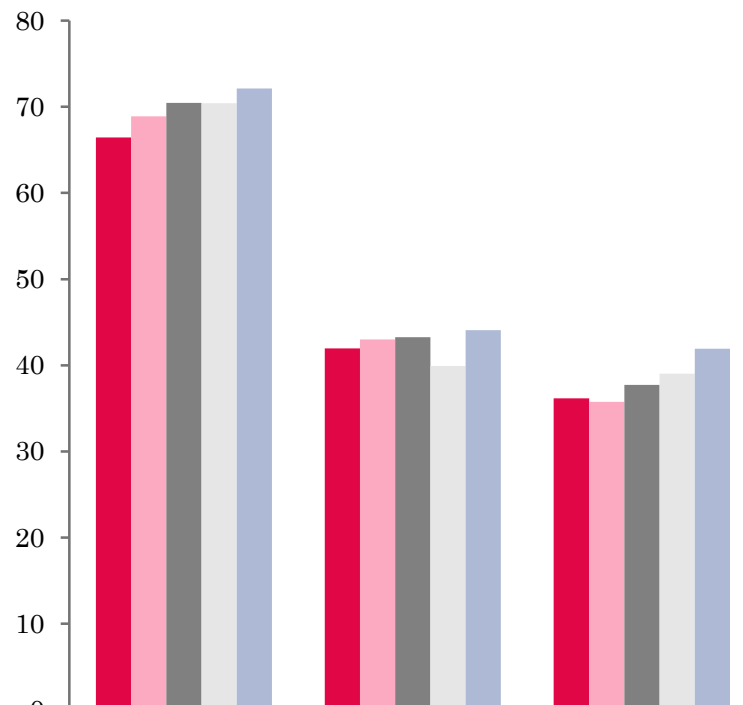


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION NOVEMBER 2012-2016



	Hotels	Guesthouses	B&Bs
2012	49	31	25
2013	50	31	25
2014	49	31	28
2015	50	29	28
2016	50	36	31

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



	Hotels	Guesthouses	B&Bs
2012	66	42	36
2013	69	43	36
2014	70	43	38
2015	70	40	39
2016	72	44	42





- Only bedspace occupancy levels in hotel establishments in the UK remained flat during November when compared to the same period in 2015. Room occupancy increased by 2% in the hotel sector when compared to November 2015. Guesthouses saw a healthy increase in both measures of occupancy during this month. Room went up 4% and bedspace by 7%. B&B establishments saw a rise in both room and bedspace occupancy levels (3% respectively) when compared to November 2015.
- At the UK level, bed occupancy levels had remained flat in three out of the six size bandings when compared with November 2015. Both the 1-3 and 11-25 size bands saw bed occupancy levels increase by 3% respectively. The 51-100 category saw the biggest increase, with levels up 4% on the same period in 2015. Room occupancy levels increased in four out of the six size bandings when compared to November 2015. The 1-3, 26-50 and 51-100 size bands all increased by 2%. Both the 4-10 and 11-25 room categories remained static in room occupancy, with the >100 size band witnessing the largest increase, up by 3% compared with the previous year.
- Seaside locations remained static in both room and bedspace occupancy levels during November 2016 with all other locations witnessing an increase in both measures of occupancy. The largest increase in both room and bedspace occupancy was in countryside/village locations, with levels up 4% in 2016 when compared to November 2015. Bedspace occupancy in city/large town and small town locations increased by 3% and 2% respectively. Room occupancy in both these locations increased by 3%, with City large towns occupancy levels at 78% and small town 62%, compared with 75% and 59% in 2015.
- Both the £40.00-£49.99 and £50.00-£59.99 tariff bands increased in bed occupancy during November 2016, up by 2% and 7% respectively. Bedspace occupancy remained static in both the £20.00-£29.99 and >£60.00 tariff bands, with the £30.00-£39.99 tariff band falling by 3%. The only decrease in room occupancy during November, was in the £30.00-£39.99 tariff band where occupancy was down by 4%. Room occupancy increased across all other tariff bands with the most significant increase in the £20.00-£29.99 tariff band, up by 10% on November 2015.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	51	50	51	73	71	73	1438	1447	1447
Northern Ireland	43	41	50	62	56	66	76	77	62
Scotland	45	55	46	64	73	67	207	207	189
Wales	41	44	44	53	61	63	61	165	163
<b>UK</b>	49	50	50	70	70	72	1782	1896	1861
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	33	32	38	46	44	47	149	119	106
Northern Ireland	22	17	26	30	26	33	18	15	17
Scotland	29	19	15	37	26	19	28	22	15
Wales	17	16	24	24	22	31	18	14	18
<b>UK</b>	31	29	36	43	40	44	213	170	156
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	32	31	33	43	44	44	249	211	178
Northern Ireland	10	11	20	16	15	26	68	74	49
Scotland	14	16	20	20	22	30	36	29	22
Wales	14	18	18	15	20	20	22	17	20
<b>UK</b>	28	28	31	38	39	42	375	331	269



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: November 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	51	49	53	46	45	47	64	62	66	71	70	72
Northern Ireland	46	38	47	32	24	34	59	47	56	53	38	50
Scotland	42	52	43	36	47	37	53	63	53	59	68	58
Wales	40	44	46	27	36	35	46	52	56	42	56	55
<b>UK</b>	49	49	52	43	44	46	61	61	65	67	68	70



**Table 35: Non-UK Percentages: November 2014 – 2016 (see notes 5a & 5b Slide 19)**

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	4	5	3	5	7	5	6	9	4	7	12	6
Northern Ireland	32	29	34	40	36	36	40	34	44	46	41	46
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	2	3	3	3	4	6
<b>UK</b>	5	6	3	6	8	5	7	9	5	8	12	7

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: November 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	25	23	25	111	29	29	29	171	40	40	43	65
Northern Ireland	9	9	13	39	14	13	30	18	23	22	30	23
Scotland	12	13	18	17	28	24	26	32	39	34	37	39
Wales	16	17	18	19	24	24	25	25	41	43	39	20
<b>UK</b>	22	21	24	186	28	28	29	246	40	39	42	147

**Table6: Occupancy Levels by Size: November 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	49	46	45	45	42	42	41	24	55	53	56	1303
Northern Ireland	39	32	42	19	42	38	48	19	50	48	58	10
Scotland	39	39	43	42	50	48	52	42	54	51	52	54
Wales	37	35	36	19	54	56	57	9	40	48	51	109
<b>UK</b>	47	44	45	125	44	43	42	94	54	52	56	1476



**Table 7: Occupancy Levels by Size: November 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	35	33	33	111	41	42	41	171	57	57	56	65
Northern Ireland	14	12	17	39	21	18	35	18	32	31	43	23
Scotland	20	18	27	17	36	32	33	32	51	47	52	39
Wales	17	19	18	19	31	31	31	25	52	54	51	20
<b>UK</b>	32	30	32	375	39	39	40	246	55	55	55	147

**Table 7: Occupancy Levels by Size: November 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	67	65	64	45	63	62	64	24	79	78	81	1303
Northern Ireland	50	44	57	19	61	53	63	19	75	66	75	10
Scotland	57	55	64	42	71	69	72	42	78	78	77	54
Wales	50	52	50	19	60	65	73	9	56	73	77	109
<b>UK</b>	64	62	64	125	64	63	65	94	78	77	80	1476



**Table 8: Occupancy Levels by Location Type: November 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	36	37	36	141	57	54	56	1014	43	42	43	337	36	37	40	239
Northern Ireland	25	20	32	30	46	44	53	43	19	18	28	41	17	15	28	14
Scotland	35	32	35	24	52	48	51	117	28	25	25	42	28	27	31	43
Wales	40	41	39	30	47	45	43	8	33	32	32	12	27	29	29	45
<b>UK</b>	36	36	36	225	56	52	55	1182	40	39	41	432	34	35	39	341

**Table 8: Occupancy Levels by Location Type: November 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	53	55	55	141	80	77	79	1014	63	64	65	337	50	52	55	239
Northern Ireland	34	26	41	30	66	60	69	43	28	24	33	41	27	23	41	14
Scotland	49	47	48	24	76	70	74	117	46	42	41	42	37	37	41	43
Wales	48	51	44	30	58	62	70	8	46	44	44	12	36	40	41	45
<b>UK</b>	52	53	54	225	78	75	78	1182	59	59	62	432	47	49	53	341

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 2014 – 2016**  
(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>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	**	**	**	**	25	25	24	18	21	19	15	52
Northern Ireland	**	**	**	**	13	12	15	10	13	8	24	27
Scotland	**	**	**	**	16	15	****	2	24	18	19	20
Wales	**	**	**	**	8	11	3	2	22	18	22	16
<b>UK</b>	**	**	**	**	23	23	24	28	21	19	16	115

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 2014 – 2016** (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>			
	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016	2014	2015	2016	Sample Size 2016
England	30	28	30	78	38	37	45	55	51	50	51	1490
Northern Ireland	21	26	28	27	48	27	30	13	40	42	51	51
Scotland	27	26	27	26	42	42	34	13	47	44	47	164
Wales	18	26	27	17	42	37	42	13	40	46	44	151
<b>UK</b>	29	28	30	148	39	37	44	94	50	49	50	1856

\*\* FIGURES NOT AVAILABLE



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	**	**	**	**	37	34	41	18	36	29	23	52
Northern Ireland	**	**	**	**	15	15	19	10	18	12	29	27
Scotland	**	**	**	**	19	21	****	2	35	26	30	20
Wales	**	**	**	**	13	18	3	2	27	24	30	16
<b>UK</b>	**	**	**	**	33	31	41	28	35	28	24	115

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	41	41	43	78	50	50	55	55	73	71	74	1490
Northern Ireland	32	37	39	27	68	38	38	13	59	58	67	51
Scotland	43	41	43	26	61	61	46	13	65	62	67	164
Wales	41	46	51	17	51	49	55	13	51	62	60	151
<b>UK</b>	41	41	43	148	52	51	54	94	70	69	73	1856

\*\* 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 2016) 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)

