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UNITED KINGDOM OCCUPANCY SURVEY

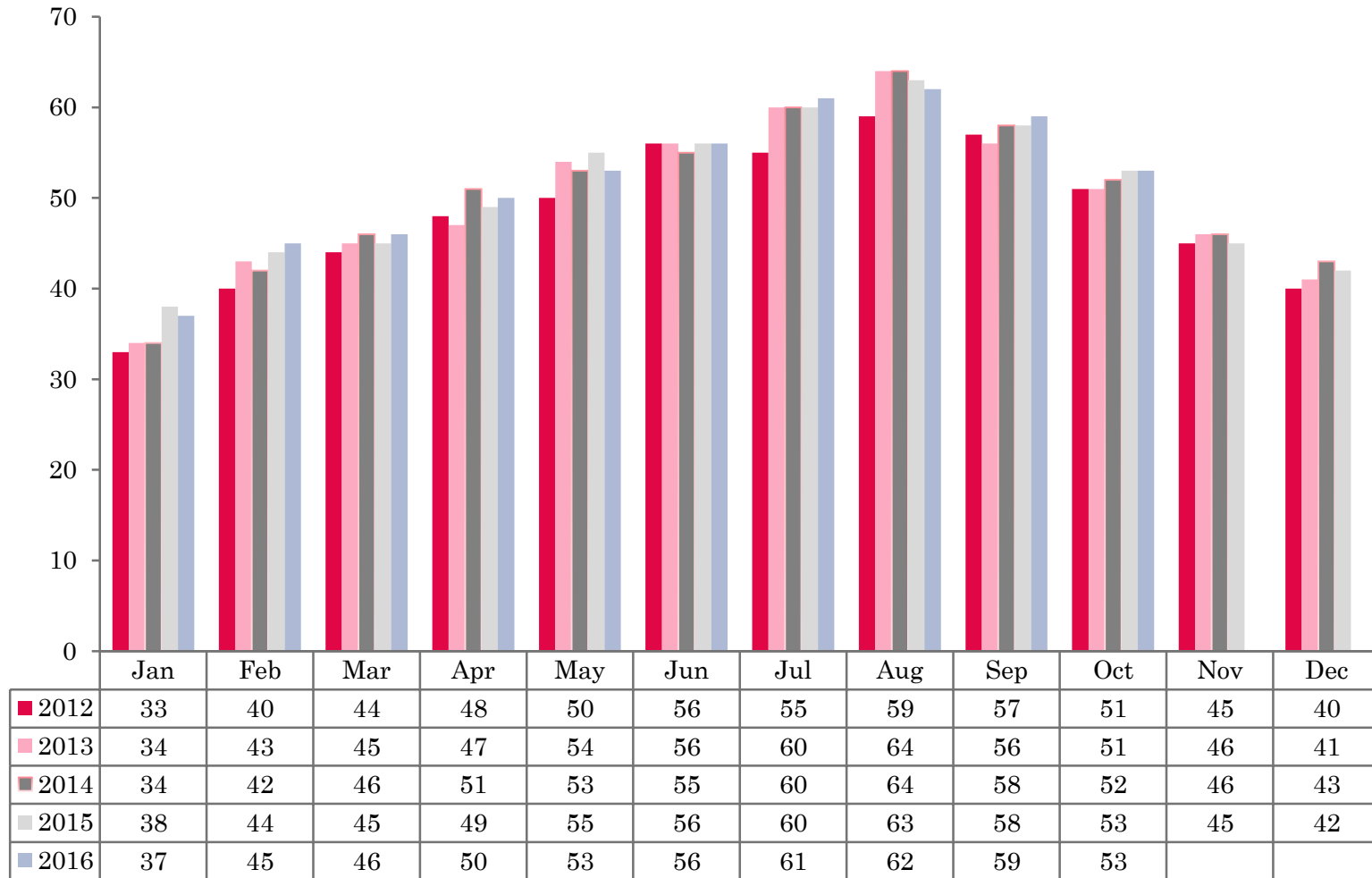
Serviced Accommodation Summary Report
October 2016

UK OCCUPANCY SURVEY

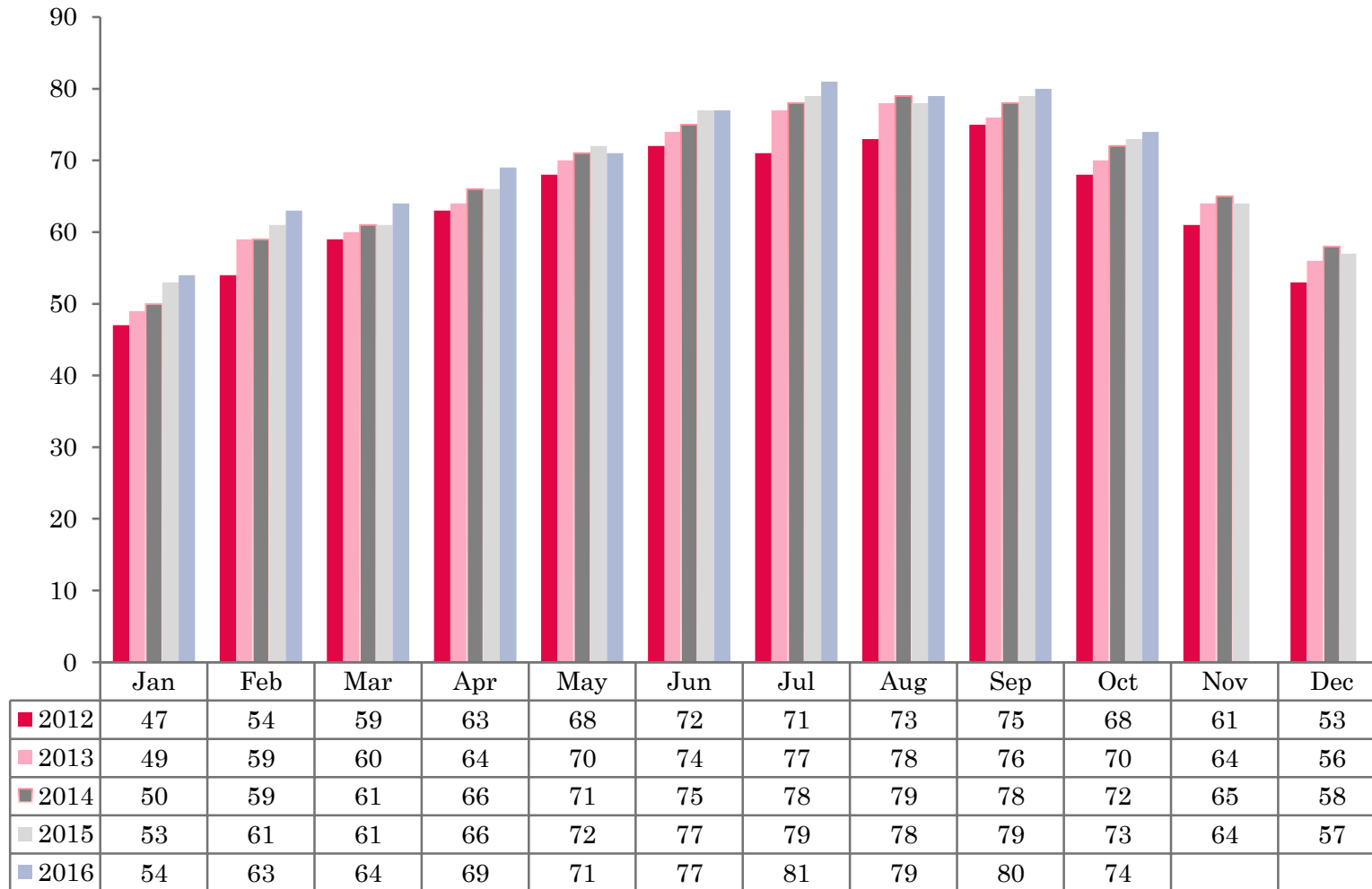
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



UK BEDROOM OCCUPANCY 2012 - 2016



- ❖ 2,398 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 53% when compared to the same period the previous year. This was also the same for room occupancy in the UK, where levels remained flat at 74% (+1%), compared to October 2015 data.



- Room occupancy had remained flat during October 2016 (+1%) at 74%, when compared to the same month in 2015. A similar picture was seen in bedspace occupancy also remaining flat at 53%, when compared with October 2015.
- Bedspace and room occupancy levels in England mirrored that of the UK as a whole with both levels on a par when compared with the same period in 2015.
- Both room and bed occupancy levels in Northern Ireland increased by a healthy 8% and 6% respectively during October 2016. Room occupancy rose from 54% to 62% and bed occupancy increased from 41% to 47%.
- Room and bedspace occupancy fell during the month of October, with bed occupancy down by 2%, at 48%. Room occupancy fell by 3%, down from 66% to 63% when compared to the same period in 2015.
- Both room and bed occupancy levels across Scotland increased during October 2016 when compared to the same period last year. An increase of 2% and 3% respectively.
- 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. Northern Ireland increased by a healthy 10% when compared with October 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: October 2014 - 2016

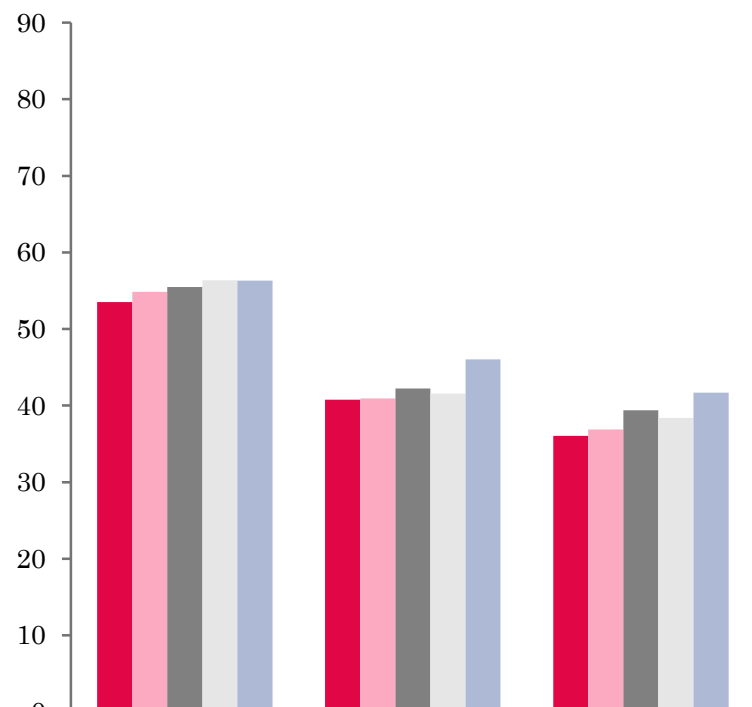
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	54	54	54	74	75	75	1897	1839	1774
Northern Ireland	39	41	47	55	54	62	167	177	167
Scotland	49	48	51	65	65	67	292	280	244
Wales	45	50	48	61	66	63	112	202	213
UK	52	53	53	72	73	74	2468	2498	2398

Table 2: UK/Non UK Occupancy Levels October 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	42	40	41	4	5	4	7	8	6	8	11	8	1897	1839	1774
Northern Ireland	19	21	18	20	20	30	40	36	38	51	49	62	167	177	167
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	292	280	244
Wales	39	41	40	3	2	3	**	**	**	6	5	6	112	202	213
UK	41	40	41	4	5	4	8	9	6	9	12	9	2468	2498	2398

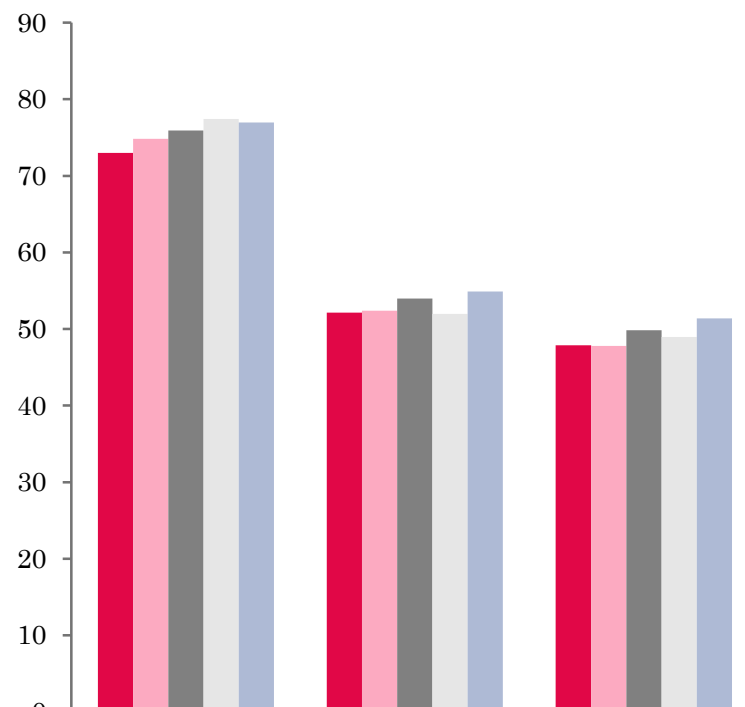


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION OCTOBER 2012-2016



	Hotels	Guesthouses	B&Bs
2012	54	41	36
2013	55	41	37
2014	55	42	39
2015	56	42	38
2016	56	46	42

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



	Hotels	Guesthouses	B&Bs
2012	73	52	48
2013	75	52	48
2014	76	54	50
2015	77	52	49
2016	77	55	51



- Room and bedspace occupancy levels in hotel establishments in the UK remained flat when compared to the same period in 2015. Guesthouses fared better with both measures of occupancy increasing. Room went up 3% and bedspace by 4%. B&B establishments saw a rise of 4% in bedspace occupancy levels whilst room occupancy increased by 2% when compared to October 2015.
- At the UK level, bed occupancy levels had remained flat in three out of the six size bandings when compared with October 2015. Both the 1-3 and 11-25 size bands saw bed occupancy levels increase by 3% respectively. Only the 51-100 category saw a decrease, with levels down 2% on the same period in 2015. Room occupancy levels increased in three out of the six size bandings when compared to October 2015. The 1-3, 4-10 and 11-25 size bands all increased by 2%. Both the 51-100 and >100 rooms fell in room occupancy, by 3% and 2% respectively, with the 26-50 size band remaining flat (-1%) when compared with the previous year.
- Only countryside/village locations saw an increase in both room and bedspace occupancy levels during October 2016 with bedspace up 4% and room rising by 3% from 47% in 2015 to 50% in 2016. Bedspace occupancy in both seaside and small town locations remained static at 48% and 49% respectively, with city/large town locations falling by 2%, down to 58%. Room occupancy in seaside locations remained static at 64%, whilst small town locations also remained on a par (+1%) with October 2015. Room occupancy levels in City large towns fell by 2%, down to 80% compared with 82% in 2015.
- Both the £20.00-£29.99 and £30.00-£39.99 tariff bands increased in bed occupancy during October 2016, up by 3% and 4% respectively. Bedspace occupancy remained static across all other tariff bands. The only increase in room occupancy during October, was in the £30.00-£39.99 tariff band where occupancy was up by 2%. Room occupancy remained static in both the £20.00-£29.99 and the >£60.00 tariff bands. Room occupancy fell by 2% in both the £40.00-£49.99 and £50.00-£59.99 tariff bands, levels at 54% and 60% respectively.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	56	57	56	77	79	77	1456	1466	1460
Northern Ireland	45	49	55	64	65	73	78	78	77
Scotland	55	55	59	74	73	77	207	207	195
Wales	53	54	59	70	72	78	65	169	169
UK	55	56	56	76	77	77	1806	1920	1901
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	45	44	48	58	55	57	168	142	115
Northern Ireland	27	24	27	35	32	41	17	18	15
Scotland	35	35	32	43	43	39	37	30	22
Wales	28	31	37	33	40	44	19	13	20
UK	42	42	46	54	52	55	241	203	172
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	43	42	44	54	53	54	273	231	199
Northern Ireland	17	18	24	23	22	28	72	81	75
Scotland	29	26	27	40	38	36	48	43	27
Wales	24	28	23	27	31	28	28	20	24
UK	39	38	42	50	49	51	421	375	325



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: October 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	58	58	51	51	52	71	72	71	75	76	76
Northern Ireland	49	47	50	37	34	36	59	58	61	54	51	53
Scotland	52	52	54	46	47	50	64	63	65	66	68	70
Wales	50	58	53	41	44	43	62	69	64	61	65	63
UK	56	57	57	49	50	51	69	70	70	73	74	75



Table 35: Non-UK Percentages: October 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	5	7	5	8	10	7	7	9	7	9	13	10
Northern Ireland	36	34	37	44	39	41	48	36	43	52	40	47
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	4	6	7	5	7
UK	6	8	5	9	11	7	8	9	7	10	13	10

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: October 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	35	34	36	130	43	43	44	180	50	49	52	75
Northern Ireland	12	13	14	59	19	22	38	23	30	32	31	31
Scotland	25	21	25	22	40	38	39	34	50	52	55	46
Wales	27	28	22	23	36	39	33	27	48	53	46	24
UK	33	31	34	234	42	42	43	264	49	49	52	176

Table6: Occupancy Levels by Size: October 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	55	55	54	48	56	51	49	25	58	59	58	1304
Northern Ireland	47	41	49	19	49	47	50	22	46	55	63	13
Scotland	51	54	55	48	58	56	64	41	60	60	61	53
Wales	47	48	45	18	67	68	69	9	56	58	56	112
UK	54	54	54	133	57	53	51	97	58	59	58	1482



Table 7: Occupancy Levels by Size: October 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	44	43	44	130	55	54	55	180	65	64	66	75
Northern Ireland	19	16	19	59	26	26	40	23	44	44	48	31
Scotland	35	30	32	22	49	47	48	34	63	64	69	46
Wales	32	32	24	23	43	48	43	27	61	64	56	24
UK	41	40	42	375	53	52	54	264	64	64	66	176

Table 7: Occupancy Levels by Size: October 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	75	74	72	48	68	73	69	25	82	84	82	1304
Northern Ireland	60	55	67	19	66	65	69	22	68	71	81	13
Scotland	71	71	74	48	77	76	82	41	84	83	82	53
Wales	63	65	61	18	69	78	78	9	86	84	82	112
UK	73	73	72	133	69	74	70	97	82	84	82	1482



Table 8: Occupancy Levels by Location Type: October 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	52	47	48	156	60	61	58	1014	49	51	50	346	46	49	52	258
Northern Ireland	34	34	37	44	47	49	56	58	26	26	32	4	27	19	27	19
Scotland	49	50	48	29	56	56	61	114	39	40	41	54	45	39	43	47
Wales	53	64	50	32	55	52	43	8	45	59	51	11	36	47	37	53
UK	51	48	48	261	59	60	58	1194	47	49	49	415	45	47	50	377

Table 8: Occupancy Levels by Location Type: October 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	64	65	65	156	83	84	80	1014	71	72	72	346	62	64	67	258
Northern Ireland	45	45	49	44	65	65	73	58	36	35	42	4	38	25	40	19
Scotland	62	65	58	29	78	78	81	114	54	57	58	54	55	50	52	47
Wales	64	78	57	32	79	78	67	8	59	75	65	11	48	60	50	53
UK	63	65	64	261	82	82	80	1194	67	69	70	415	60	61	65	377

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	**	**	**	**	44	43	45	20	34	29	34	58
Northern Ireland	**	**	**	**	11	18	15	10	18	15	26	42
Scotland	**	**	**	**	18	30	****	2	31	28	28	25
Wales	**	**	**	**	21	9	4	3	29	43	27	18
UK	**	**	**	**	38	40	43	33	33	29	33	143

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	43	42	41	94	50	46	47	62	55	57	56	225
Northern Ireland	36	38	34	34	45	38	34	17	44	49	56	64
Scotland	43	37	37	33	56	56	58	25	57	56	60	157
Wales	34	44	34	15	46	56	44	13	54	62	54	159
UK	42	41	40	176	51	48	48	117	55	57	56	605

** FIGURES NOT AVAILABLE

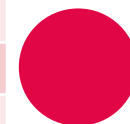


Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 2014 – 2016 (see note 5a Slide 19)

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	**	**	**	**	52	50	51	20	47	40	44	58
Northern Ireland	**	**	**	**	20	19	20	10	25	20	31	42
Scotland	**	**	**	**	28	44	****	2	43	41	37	25
Wales	**	**	**	**	31	12	5	3	33	56	34	18
UK	**	**	**	**	47	48	49	33	45	41	43	143

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 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	55	56	54	94	62	59	59	62	77	78	77	225
Northern Ireland	51	52	46	34	61	49	48	17	62	65	73	64
Scotland	57	54	50	33	72	73	76	25	75	73	77	157
Wales	51	63	60	15	61	71	60	13	73	81	69	159
UK	55	56	54	176	63	62	60	117	76	77	77	605

** 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)

