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UNITED KINGDOM OCCUPANCY SURVEY

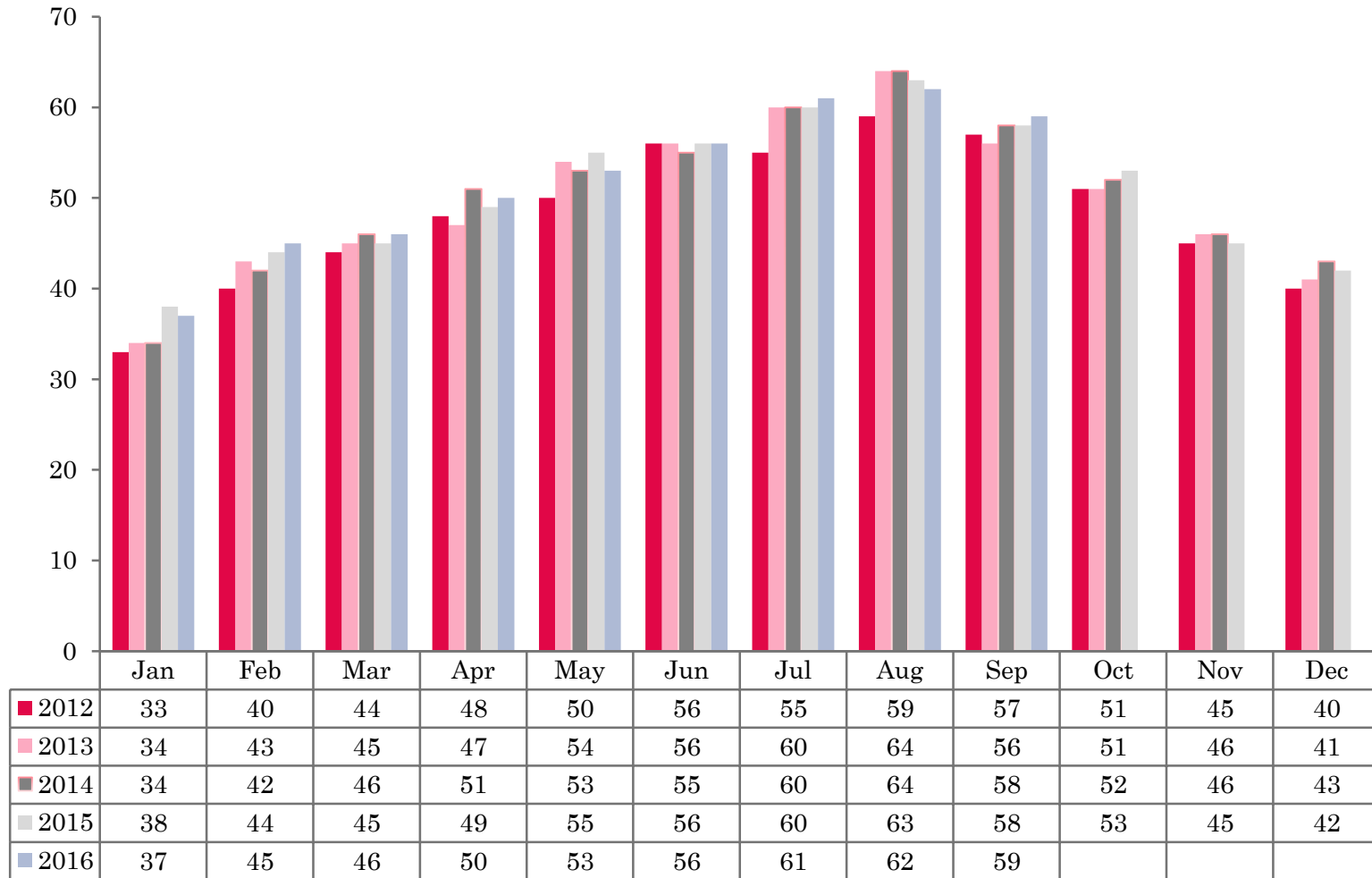
Serviced Accommodation Summary Report
September 2016

UK OCCUPANCY SURVEY

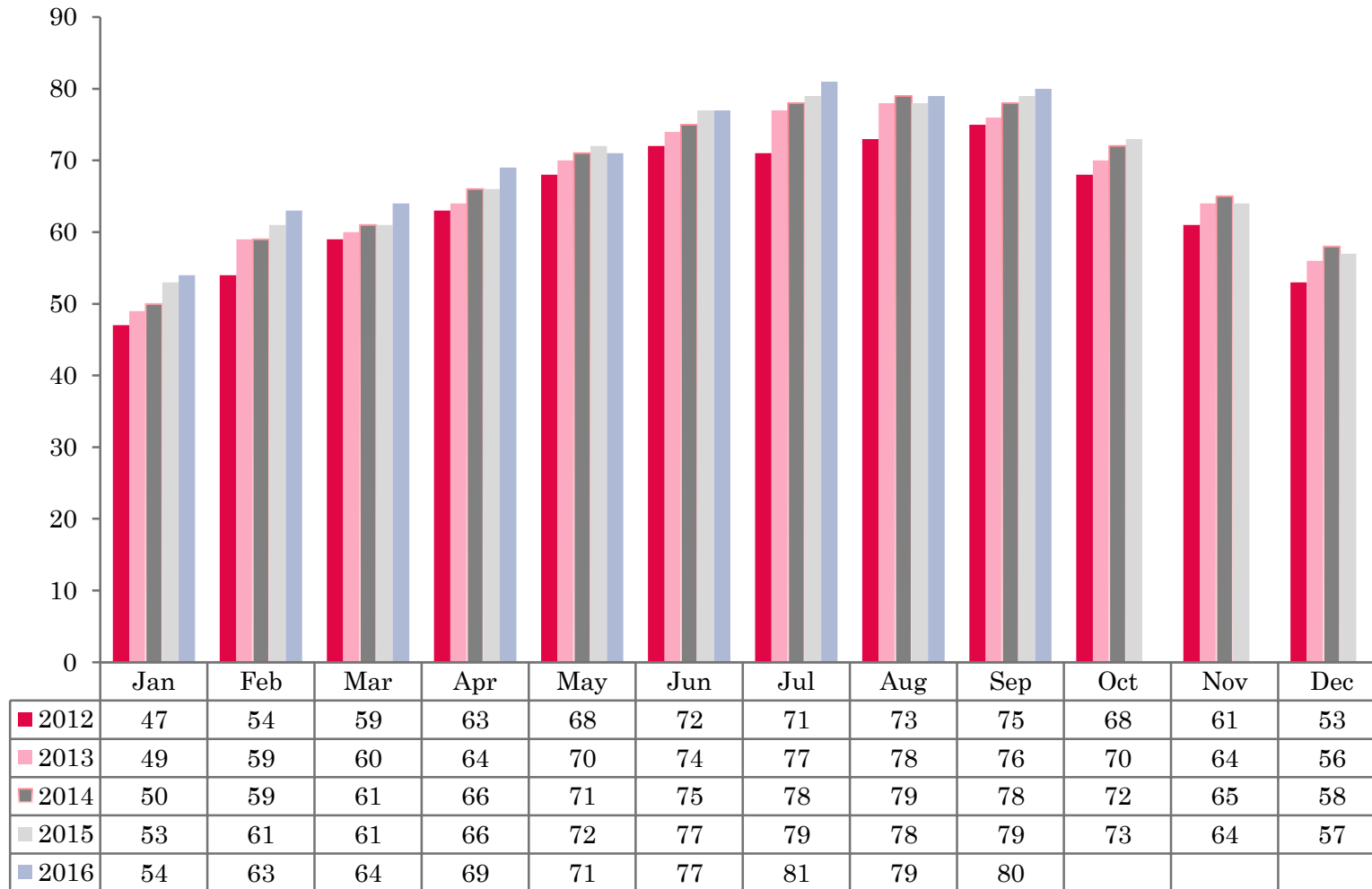
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



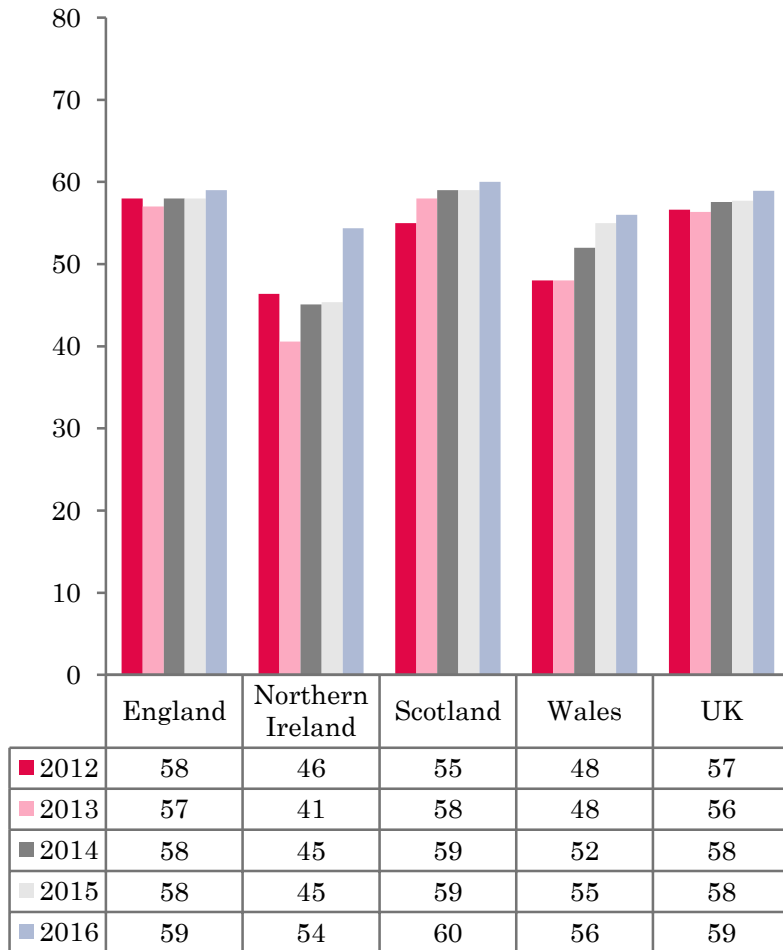
UK BEDROOM OCCUPANCY 2012 - 2016



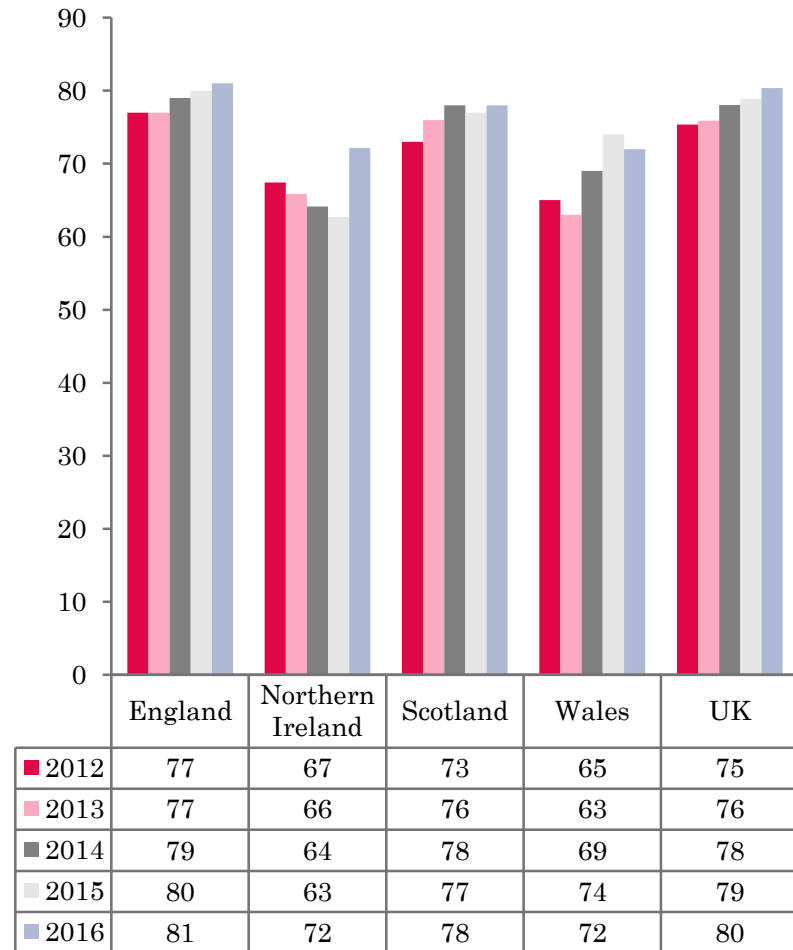
- ❖ 2,403 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace occupancy remained flat at 59% (+1%) when compared to the same period the previous year. This was also the same for room occupancy in the UK, where levels remained flat at 80% (+1%), compared to September 2015 data.



NATIONAL BEDSPACE OCCUPANCY SEPTEMBER 2012-2016



NATIONAL ROOM OCCUPANCY SEPTEMBER 2012-2016



- Room occupancy had remained flat during September 2016 (+1%) at 80%, when compared to the same month in 2015. A similar picture was seen in bedspace occupancy also remaining flat (+1%) at 59%, when compared with September 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 9% respectively during September 2016. Room occupancy rose from 63% to 72% and bed occupancy increased from 45% to 54%.
- Wales bedspace occupancy remained flat (+1%) at 56% during September, with room occupancy falling by 2%, down from 74% to 72% when compared to the same period in 2015.
- Both room and bed occupancy levels across Scotland remained flat (+1% respectively) during September 2016 when compared to the same period last 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. Northern Ireland remained on a par with September 2015, whilst Wales increased by 2%. (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) Slide 19



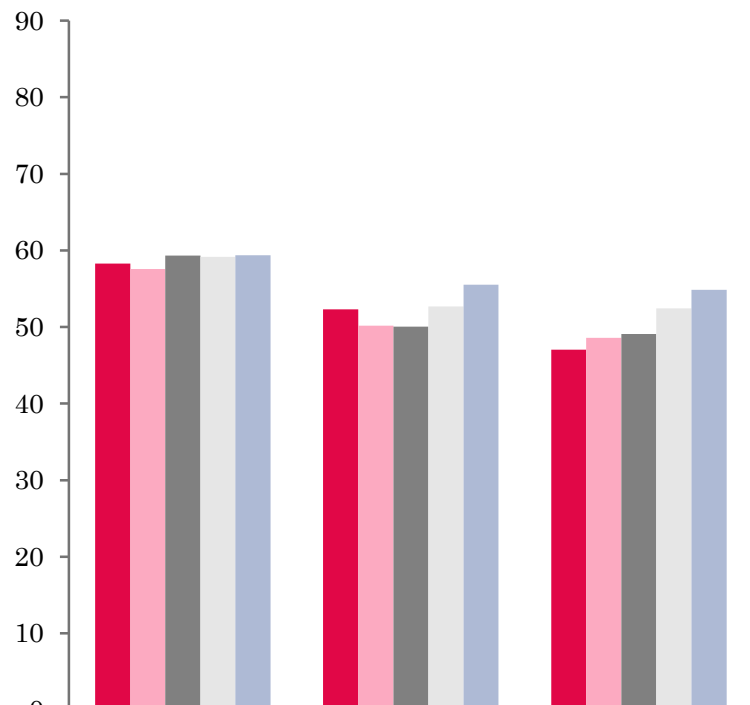
Table 1: Occupancy Levels: September 2014 - 2016

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	58	58	59	79	80	81	1903	1855	1770
Northern Ireland	45	45	54	64	63	72	171	173	168
Scotland	59	59	60	78	77	78	306	291	249
Wales	52	55	56	69	74	72	120	206	216
UK	58	58	59	78	79	80	2500	2525	2403

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

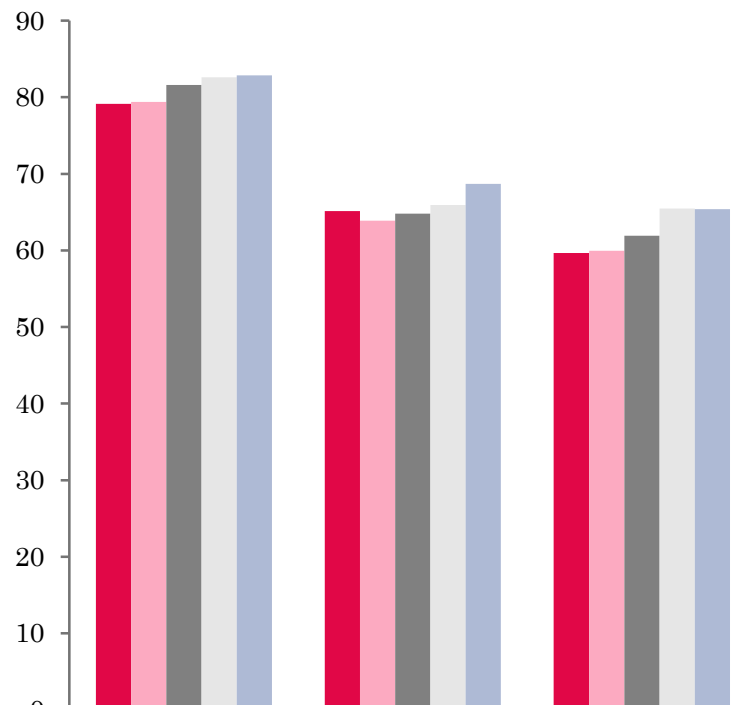
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	48	49	49	5	5	5	9	9	8	9	10	9	1903	1855	1770
Northern Ireland	21	20	20	24	25	35	44	41	42	53	55	64	171	173	168
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	306	291	249
Wales	48	50	52	4	3	3	**	**	**	8	6	6	120	206	216
UK	47	48	49	5	5	5	10	10	8	10	11	10	2500	2525	2403

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



	Hotels	Guesthouses	B&Bs
2012	58	52	47
2013	58	50	49
2014	59	50	49
2015	59	53	52
2016	59	56	55

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



	Hotels	Guesthouses	B&Bs
2012	79	65	60
2013	79	64	60
2014	82	65	62
2015	83	66	65
2016	83	69	65



- Room and bedspace occupancy levels in hotel establishments remained flat when compared to the same period in 2015. Guesthouses fared better with both measures of occupancy rising by 3% respectively. B&B establishments saw a rise of 3% in bedspace occupancy levels whilst room occupancy remained flat at 65% when compared to September 2015.
- At the UK level, bed occupancy levels had remained flat in three out of the six size bandings when compared with September 2015. Both the 1-3 and 4-10 size bands saw bed occupancy levels increase by 2% and 3% respectively. Only the 51-100 category saw a decrease, with levels down 2% on the same period in 2015. Room occupancy levels remained flat in nearly all of the six size bandings with the exception in the 4-10 size band, who witnessed an increase of 2%, up from 65% to 67% in September 2016. The largest size band >100 remained static, the 1-3 and 26-50 rooms remained flat (-1%) with the 11-25 and 51-100 size also remaining flat (+1%) when compared with the previous year.
- Only countryside/village locations saw an increase in both room and bedspace occupancy levels during September 2016 with bedspace up 4% and room rising by 5% from 70% in 2015 to 75% in 2016. Bedspace occupancy in the other three locations remained on a par (+1%) for seaside and city/large towns and small towns static at 54%. Room occupancy in seaside locations rose by 2% during September 2016, whilst the reverse was seen in small towns, falling by 2%, down from 77% in 2015 to 75% during September 2016. Room occupancy levels in City large towns remained static at 86%.
- The only significant increase seen across all tariff bands was in the £30.00-£39.99 banding where bedspace occupancy increased by 3%, up from 40% to 43% in September 2016. The £50.00-£59.99 size banding saw the reverse, with bedspace occupancy falling by 3% when compared with the same period in 2015. All other tariff bands remained flat when compared with 2015. Room occupancy fell in two out of the six size bands, the £50.00-£59.99 down by 3% and £40.00-£49.99 decreasing by 2%. The remaining three tariff bands all remained flat, £20.00-£29.99 (-1%) and the £30.00-£39.99 and >£60.00 (+1%).



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	59	59	59	82	83	83	1451	1461	1450
Northern Ireland	51	54	61	73	74	83	79	75	74
Scotland	63	61	63	83	83	83	214	205	192
Wales	57	58	59	75	79	78	69	169	168
UK	59	59	59	82	83	83	1813	1910	1884
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	50	54	56	66	69	70	174	156	119
Northern Ireland	33	26	27	45	43	41	17	18	18
Scotland	55	53	59	66	58	65	36	35	26
Wales	43	43	43	51	52	52	19	17	22
UK	50	53	56	65	66	69	246	226	185
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	51	54	56	64	68	67	278	238	201
Northern Ireland	26	21	34	36	28	43	75	80	76
Scotland	48	54	50	62	65	59	56	51	31
Wales	33	37	43	41	44	46	32	20	26
UK	49	52	55	62	65	65	441	389	334



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: September 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	61	62	62	54	55	56	76	77	77	80	82	83
Northern Ireland	53	50	56	42	38	47	68	65	71	63	59	70
Scotland	63	63	63	57	56	58	78	77	76	79	78	80
Wales	57	62	62	47	51	51	70	74	73	68	74	72
UK	61	62	62	54	55	56	76	77	77	79	81	82



Table 35: Non-UK Percentages: September 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	6	7	7	11	11	10	8	9	8	10	10	10
Northern Ireland	39	41	36	48	44	45	54	45	42	61	48	49
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	7	6	6	9	6	7
UK	7	8	7	12	12	10	9	10	8	11	11	10

**** FIGURES NOT AVAILABLE**



Table 6: Occupancy Levels by Size: September 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	45	47	47	133	52	53	56	179	55	59	60	80
Northern Ireland	22	19	23	63	28	25	44	22	33	36	40	31
Scotland	43	45	47	24	57	59	60	42	63	59	63	44
Wales	34	34	43	27	46	51	45	32	53	61	64	24
UK	44	45	47	247	52	53	56	275	56	59	60	179

Table6: Occupancy Levels by Size: September 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	61	60	60	47	58	56	55	22	58	59	60	1297
Northern Ireland	50	42	61	17	51	53	59	23	54	59	65	12
Scotland	62	61	62	46	65	65	63	42	62	61	62	51
Wales	51	53	53	17	69	64	75	9	63	56	58	109
UK	60	59	60	127	59	58	56	96	59	59	60	1469



Table 7: Occupancy Levels by Size: September 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	55	59	56	133	66	66	68	179	72	76	76	80
Northern Ireland	31	25	29	63	44	29	50	22	46	54	58	31
Scotland	57	59	59	24	68	66	67	42	78	75	81	44
Wales	41	41	46	27	58	62	55	32	64	75	71	24
UK	54	57	56	375	65	65	67	275	72	75	76	179

Table 7: Occupancy Levels by Size: September 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	79	81	79	47	77	78	81	22	85	86	86	1297
Northern Ireland	70	66	75	17	72	72	81	23	77	80	90	12
Scotland	83	81	83	46	86	87	83	42	89	88	85	51
Wales	69	71	74	17	76	84	82	9	91	85	86	109
UK	79	80	79	127	78	80	81	96	86	86	86	1469



Table 8: Occupancy Levels by Location Type: September 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	56	56	57	155	61	60	61	1010	53	55	54	345	56	57	61	260
Northern Ireland	44	38	50	48	52	56	62	56	32	31	36	44	25	17	37	20
Scotland	60	59	60	29	64	63	62	112	50	53	56	53	57	57	61	55
Wales	61	64	66	31	59	52	55	8	59	59	59	12	43	47	48	59
UK	57	56	57	263	61	60	61	1186	52	54	54	454	55	56	60	394

Table 8: Occupancy Levels by Location Type: September 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	73	75	78	155	85	86	86	1010	75	79	76	345	70	72	76	260
Northern Ireland	59	52	65	48	74	75	83	56	45	42	47	44	36	34	47	20
Scotland	75	76	75	29	89	87	85	112	69	72	74	53	70	68	70	55
Wales	74	78	75	31	85	78	74	8	71	75	73	12	54	60	59	59
UK	73	75	77	263	85	86	86	1186	73	77	75	454	68	70	75	394

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	**	**	**	**	38	40	39	21	40	40	42	60
Northern Ireland	**	**	**	**	24	15	16	13	29	20	32	42
Scotland	**	**	**	**	44	44	****	3	47	45	52	28
Wales	**	**	**	**	36	9	21	3	37	43	38	21
UK	**	**	**	**	39	38	38	40	41	40	43	151

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	54	57	56	91	56	57	54	57	59	59	60	1512
Northern Ireland	32	41	48	35	49	45	45	15	51	54	61	63
Scotland	53	55	57	31	65	66	64	22	64	63	63	164
Wales	34	44	45	16	72	56	51	15	60	62	62	161
UK	52	56	56	173	58	58	55	109	60	60	60	1900

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	**	**	**	**	54	54	48	21	54	54	55	60
Northern Ireland	**	**	**	**	40	18	26	13	39	27	39	42
Scotland	**	**	**	**	57	33	****	3	60	58	63	28
Wales	**	**	**	**	53	12	24	3	47	56	50	21
UK	**	**	**	**	54	48	47	40	54	54	55	151

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	68	71	69	91	72	72	69	57	81	83	84	1512
Northern Ireland	46	57	62	35	68	57	60	15	73	74	82	63
Scotland	70	73	75	31	84	83	82	22	83	83	83	164
Wales	57	63	62	16	75	71	69	15	79	81	78	161
UK	67	71	69	173	74	73	70	109	81	83	84	1900

** 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)

