



UNITED KINGDOM OCCUPANCY SURVEY

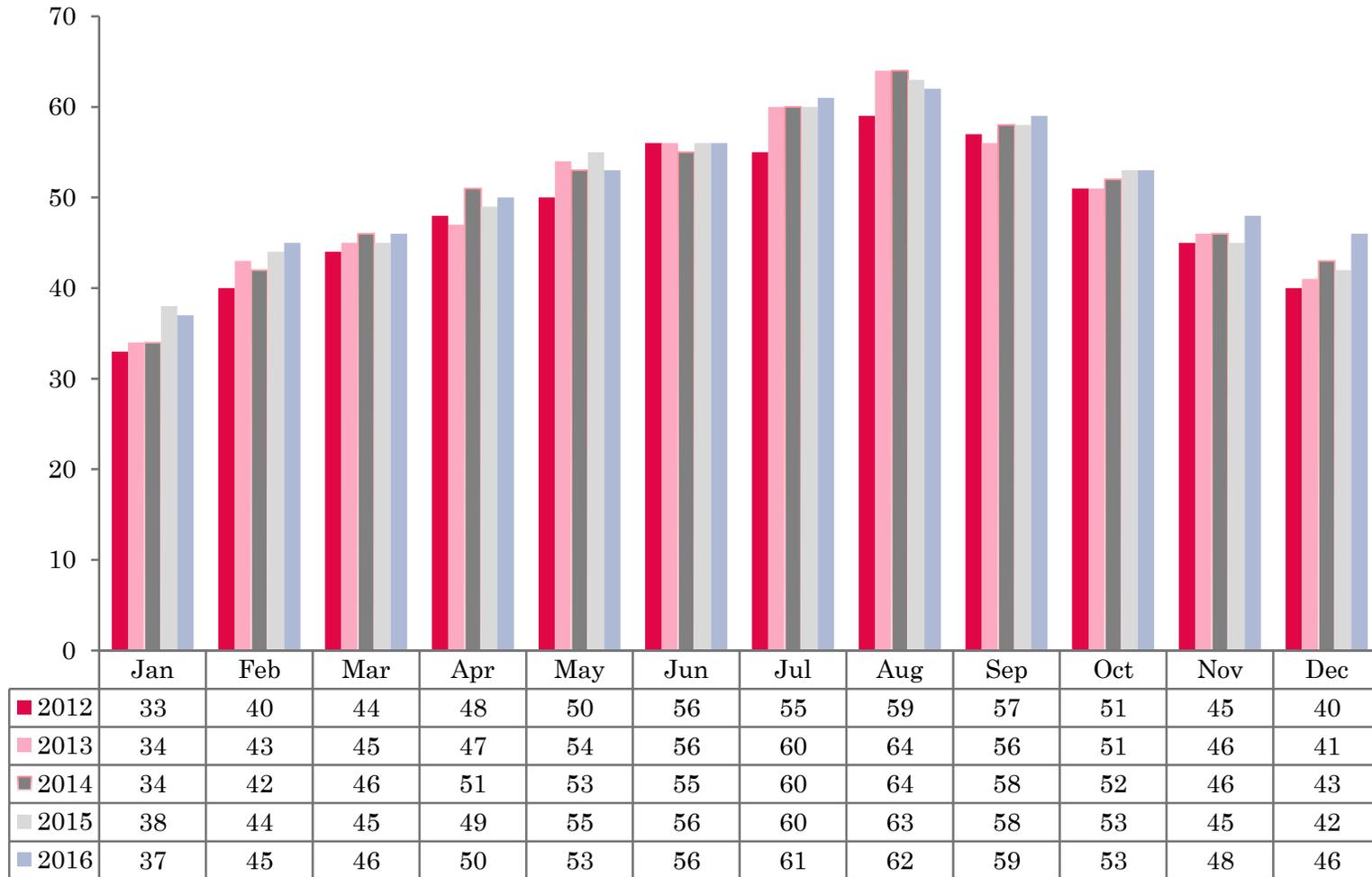
Serviced Accommodation Summary Report
December 2016

UK OCCUPANCY SURVEY

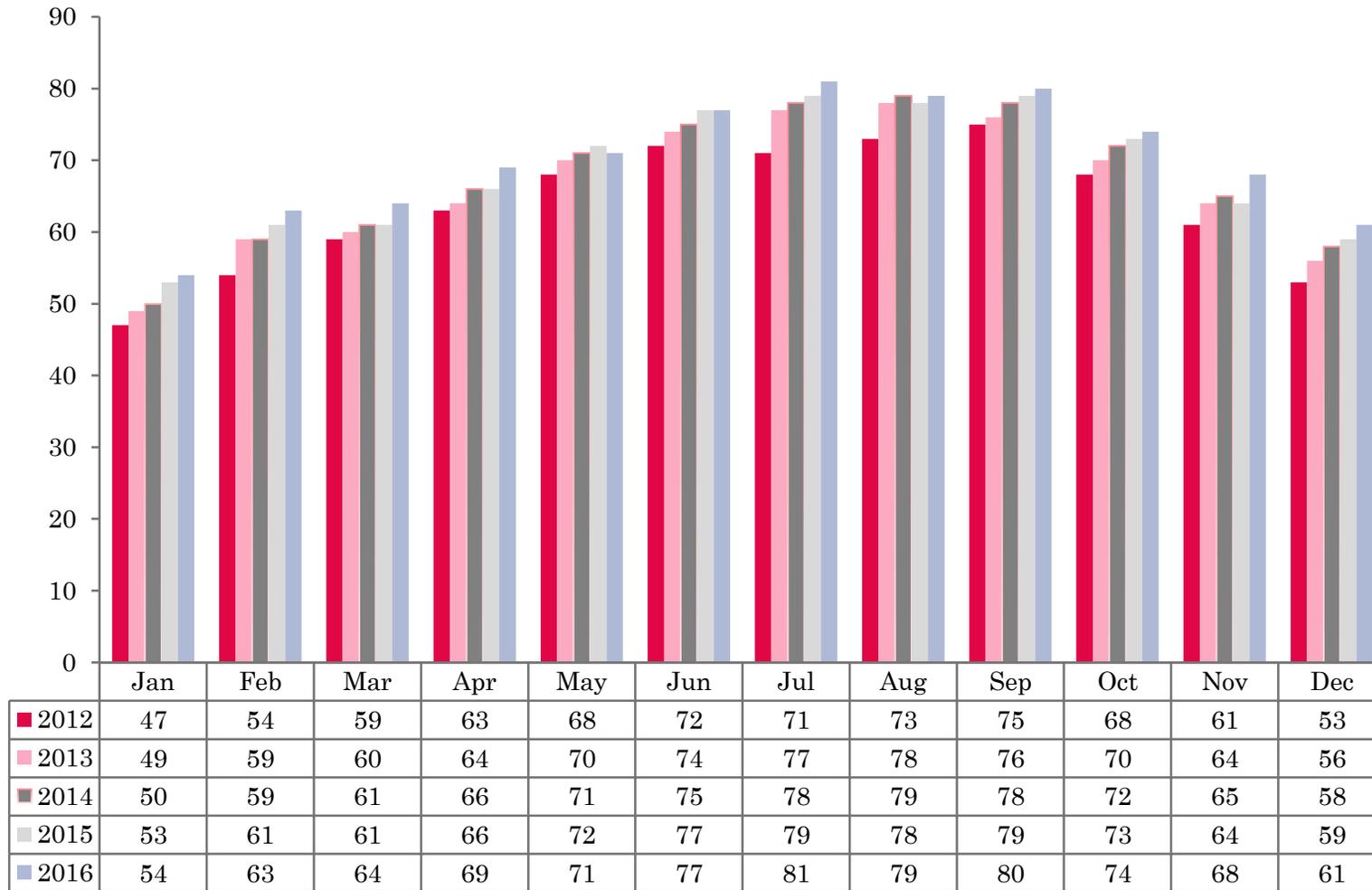
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2012 - 2016



UK BEDROOM OCCUPANCY 2012 - 2016



- ❖ 2,312 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 46% when compared to the same period the previous year. Room occupancy levels in the UK were at 61% during December 2016, an increase of 2% compared to December 2015 data.



- Room occupancy had increased by 2% during December 2016 at 61%, when compared to the same month in 2015. Bedspace occupancy levels rose by 4%, when compared with December 2015.
- Bedspace occupancy levels in England increased by 3% during December 2015, with room occupancy also up by 3% when compared with the same period in 2015.
- Room occupancy levels in Northern Ireland increased by a healthy 9% during December 2016, up from 42% to 51%. Bed occupancy increased by 6%, up from 33% to 39%.
- Both room and bedspace occupancy in Wales increased in both measures of occupancy during the month of December, up by 3% and 4% respectively when compared to the same period the previous year.
- Room occupancy levels across Scotland remained flat during December 2016 when compared to the same period in 2015. Bed occupancy had increased by 2% compared to December 2015.
- 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 2015 data. Northern Ireland increased by 9% when compared with December 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: December 2014 - 2016

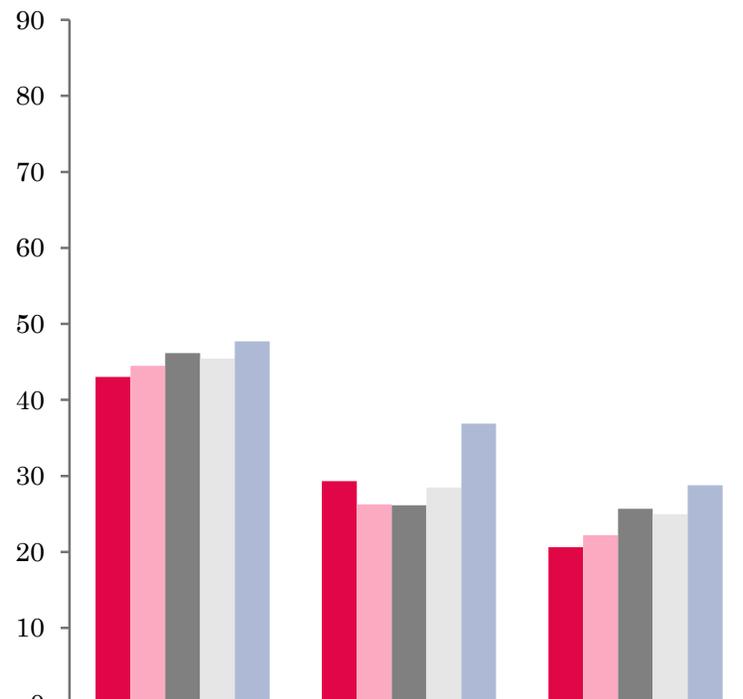
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	45	44	47	61	60	63	1818	1799	1723
Northern Ireland	30	33	39	41	42	51	158	151	170
Scotland	35	35	37	48	49	48	250	241	217
Wales	30	36	40	39	48	51	98	189	202
UK	43	43	46	58	59	61	2324	2380	2312

Table 2: UK/Non UK Occupancy Levels December 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	31	29	28	3	2	2	5	5	5	8	8	6	1818	1799	1723
Northern Ireland	18	17	15	12	16	25	35	35	32	41	50	63	158	151	170
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	250	241	217
Wales	29	26	32	1	1	1	**	**	**	4	3	2	98	189	202
UK	31	29	28	3	2	2	6	5	5	9	8	7	2324	2380	2312

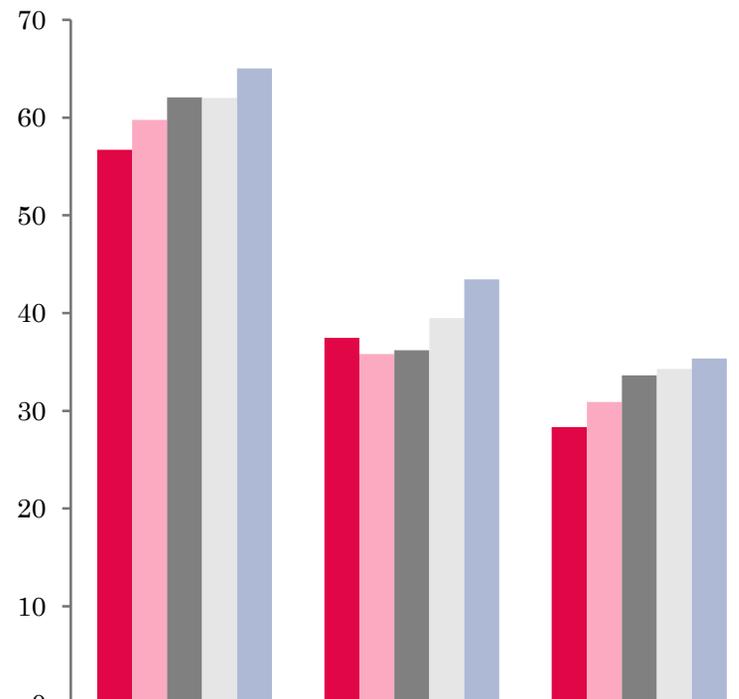


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2012-2016

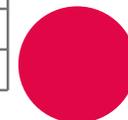


	Hotels	Guesthouses	B&Bs
2012	43	29	21
2013	44	26	22
2014	46	26	26
2015	45	28	25
2016	48	37	29

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



	Hotels	Guesthouses	B&Bs
2012	57	37	28
2013	60	36	31
2014	62	36	34
2015	62	39	34
2016	65	43	35



- Both room and bedspace occupancy levels in hotel establishments in the UK increased by 3% during December, when compared to the same period in 2015. In the guesthouse sector bed occupancy saw a healthy increase of 9% during this month, with room occupancy up by 4% when compared to December 2015. B&B establishments saw a rise in bedspace occupancy levels, up by 4% on 2015 data, with room occupancy remaining flat.
- At the UK level, bed occupancy levels had remained flat in two out of the six size bandings when compared with December 2015. Both the 11-25 and >100 size bands saw bed occupancy levels increase by 11% and 3% respectively, with both the 1-3 and 51-100 size bands decreasing in bed occupancy when compared with December 2015. Room occupancy levels increased in three out of the six size bandings when compared to the same period in 2015. The 11-25 and 26-50 size bands increased by 3%, with >100 size band up by 4% when compared to the same month the previous year. Both the 1-3 and 4-10 size bands decreased in room occupancy, down 3% and 2% respectively. The 51-100 size band remained flat compared to December 2015.
- Seaside locations remained static in both room and bedspace occupancy levels during December 2016. City/large town locations saw an increase in both measures of occupancy during December, up by 2% in bed occupancy and 3% in room occupancy when compared to December 2015. Small town locations remained flat in bed occupancy during December, with room occupancy increasing by 2% compared to the same period last year. Countryside/village locations bed occupancy levels were up 2% in 2016 when compared to December 2015 with room occupancy remaining flat.
- Bed occupancy increased across all tariff bands during December 2016, with the exception of the £30.00-£39.99 tariff band where levels remained flat. The largest of these was in the £20.00-£29.99 tariff band where bed occupancy levels were 11% higher than the same period in 2015. Room occupancy remained static in the £30.00-£39.99 tariff band with all other tariff bands increasing in room occupancy when compared to December 2015. The largest of these was in the £20.00-£29.99 tariff band where occupancy was up by 14%.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	48	46	48	65	63	66	1440	1457	1446
Northern Ireland	37	40	48	49	51	61	75	75	77
Scotland	41	42	46	54	56	58	200	200	185
Wales	36	40	44	45	53	57	60	161	163
UK	46	45	48	62	62	65	1775	1893	1871
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	29	30	40	40	41	47	148	131	100
Northern Ireland	19	15	17	24	17	27	18	15	20
Scotland	16	18	11	23	32	13	20	15	14
Wales	13	17	22	19	24	27	17	15	19
UK	26	28	37	36	39	43	203	176	153
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
England	29	27	31	37	37	38	230	211	177
Northern Ireland	7	9	11	11	13	14	65	57	73
Scotland	16	11	12	26	16	16	30	26	18
Wales	9	9	15	12	11	18	21	13	20
UK	26	25	29	34	34	35	346	307	288



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: December 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	49	47	52	42	41	43	60	59	63	62	61	63
Northern Ireland	42	35	44	28	26	32	50	44	55	41	37	46
Scotland	39	39	44	34	35	36	47	49	52	49	51	50
Wales	34	41	47	26	33	35	40	49	54	37	47	49
UK	47	46	51	40	40	42	57	58	62	58	59	61



Table 35: Non-UK Percentages: December 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	3	4	6	6	6	6	6	5	9	9	8
Northern Ireland	31	31	25	35	35	29	38	36	38	42	39	42
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	3	1	4	3	3
UK	5	3	4	7	6	6	7	6	5	10	9	8

**** FIGURES NOT AVAILABLE**



Table 6: Occupancy Levels by Size: December 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	21	22	19	114	26	26	26	162	38	33	45	67
Northern Ireland	8	6	9	56	9	12	15	27	22	22	23	35
Scotland	12	7	11	12	25	24	22	32	36	32	33	32
Wales	11	8	16	18	17	23	23	27	37	37	46	23
UK	19	20	18	200	25	26	25	248	37	33	44	157

Table6: Occupancy Levels by Size: December 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	44	44	44	40	45	38	33	25	51	50	53	1303
Northern Ireland	34	34	38	18	39	36	42	22	38	48	57	12
Scotland	34	36	39	47	43	46	52	41	49	49	55	53
Wales	37	35	33	18	45	49	51	9	35	46	49	107
UK	42	43	43	123	45	39	35	97	50	50	53	1475



Table 7: Occupancy Levels by Size: December 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	29	30	26	114	36	39	37	162	52	50	53	67
Northern Ireland	13	9	12	56	12	16	19	27	31	31	36	35
Scotland	22	11	16	12	32	34	26	32	43	42	44	32
Wales	14	9	18	18	22	31	28	27	46	45	52	23
UK	27	28	25	375	34	38	36	248	50	49	52	157

Table 7: Occupancy Levels by Size: December 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	58	57	60	40	57	54	53	25	71	69	73	1303
Northern Ireland	43	39	52	18	50	48	54	22	53	59	70	12
Scotland	46	50	50	47	55	62	65	41	68	66	70	53
Wales	48	46	44	18	49	54	56	9	48	65	69	107
UK	55	56	59	123	56	55	54	97	69	69	73	1475



Table 8: Occupancy Levels by Location Type: December 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	39	34	32	133	53	51	54	1011	39	39	40	341	35	35	37	238
Northern Ireland	22	20	28	38	38	43	49	58	20	21	24	55	13	12	17	19
Scotland	29	28	33	21	47	48	52	114	21	20	22	38	27	27	23	44
Wales	34	36	36	30	45	46	35	9	30	30	26	13	24	25	36	46
UK	37	33	32	222	51	51	53	1192	36	37	38	447	33	34	36	347

Table 8: Occupancy Levels by Location Type: December 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	47	49	49	133	72	70	73	1011	56	56	59	341	46	48	47	238
Northern Ireland	29	26	37	38	51	53	62	58	26	26	31	55	20	18	26	19
Scotland	37	38	43	21	64	63	67	114	33	36	32	38	38	37	29	44
Wales	41	44	40	30	50	51	50	9	38	41	37	13	33	34	44	46
UK	45	48	48	222	69	69	72	1192	51	54	56	447	44	46	45	347

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 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	**	**	**	**	26	22	32	13	15	15	15	48
Northern Ireland	**	**	**	**	7	10	4	14	11	9	14	34
Scotland	**	**	**	**	30	19	****	1	11	8	12	21
Wales	**	**	**	**	3	11	****	2	16	17	20	17
UK	**	**	**	**	25	21	32	27	14	14	15	120

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 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	27	23	27	78	35	34	44	53	47	46	48	1490
Northern Ireland	27	24	26	32	38	23	22	19	35	42	48	71
Scotland	24	20	33	22	37	32	20	19	44	45	48	153
Wales	20	25	29	17	38	34	33	14	36	43	46	152
UK	26	23	28	149	35	34	41	105	46	46	48	1866

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 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	**	**	**	**	39	30	43	13	28	23	21	48
Northern Ireland	**	**	**	**	7	11	8	14	16	12	19	34
Scotland	**	**	**	**	45	27	****	1	18	15	16	21
Wales	**	**	**	**	6	18	****	2	23	24	28	17
UK	**	**	**	**	37	29	43	27	26	22	21	120

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 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	36	36	37	78	44	46	50	53	65	63	66	1490
Northern Ireland	37	32	36	32	54	33	28	19	46	53	61	71
Scotland	36	32	46	22	54	47	31	19	57	59	61	153
Wales	34	39	44	17	47	41	41	14	46	56	57	152
UK	36	36	38	149	46	46	48	105	62	62	65	1866

** 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)

