



UNITED KINGDOM OCCUPANCY SURVEY

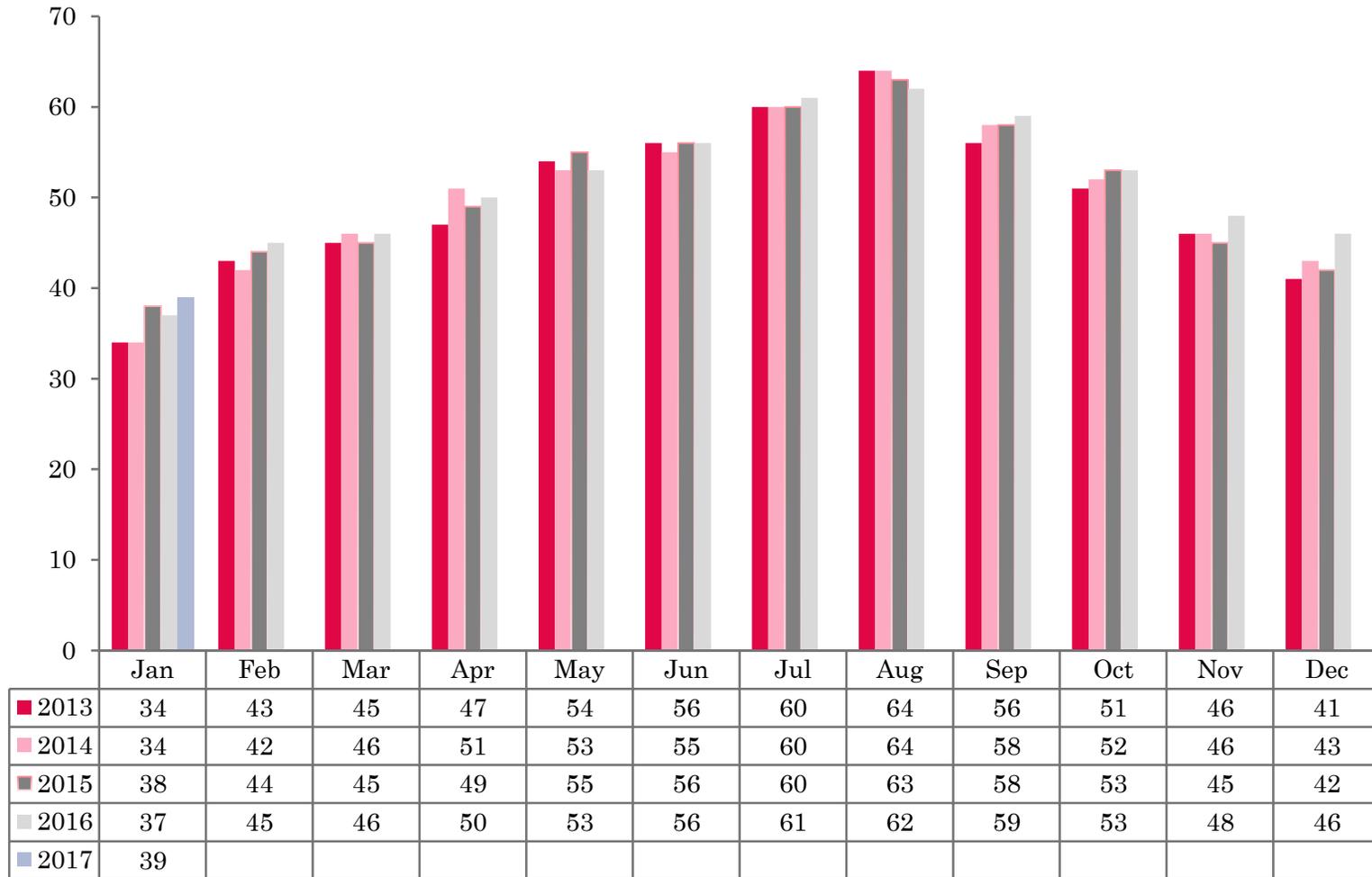
Serviced Accommodation Summary Report
January 2017

UK OCCUPANCY SURVEY

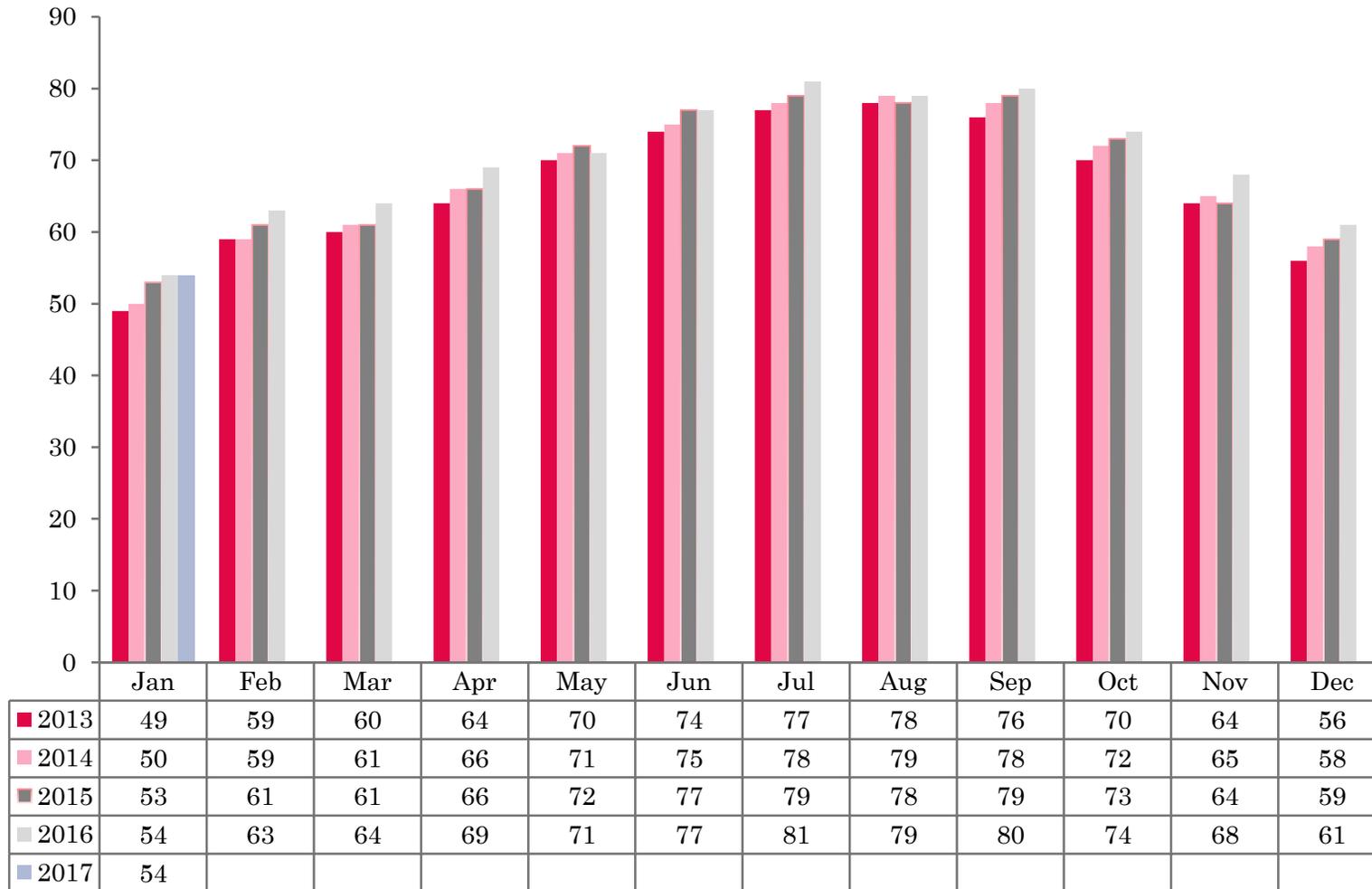
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2013 - 2017



UK BEDROOM OCCUPANCY 2013 - 2017



- ❖ 2,235 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 2%, up to 39% when compared to the same period the previous year. Room occupancy levels in the UK were at 54% during January 2017, remaining static compared with 2016 data.



- Room occupancy had remained flat during January 2017 at 54%, when compared to the same month in 2016. Bedspace occupancy levels rose by 2%, when compared with January 2016.
- Both room and bedspace occupancy levels in England remained flat, at 56% and 39% respectively, when compared with the same period in 2016.
- Room occupancy levels in Northern Ireland increased by a healthy 15% during January 2017, up from 33% to 48%. Bed occupancy increased by 11%, up from 24% in 2016 to 35% in January 2017.
- Both room and bedspace occupancy in Wales remained flat, when compared to the same period the previous year.
- Room occupancy levels across Scotland fell slightly during January 2017 when compared to the same period in 2016. Bed occupancy had increased by a healthy 12% compared to the same month in 2016.
- 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 2016 data. Northern Ireland increased by 9% when compared with January 2016, 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: January 2015 – 2017

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	39	38	39	54	55	56	1809	1780	1716
Northern Ireland	27	24	35	40	33	48	172	192	212
Scotland	40	30	42	57	45	42	239	231	113
Wales	30	32	32	41	43	43	195	191	194
UK	38	37	39	53	54	54	2415	2394	2235

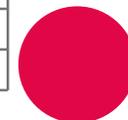
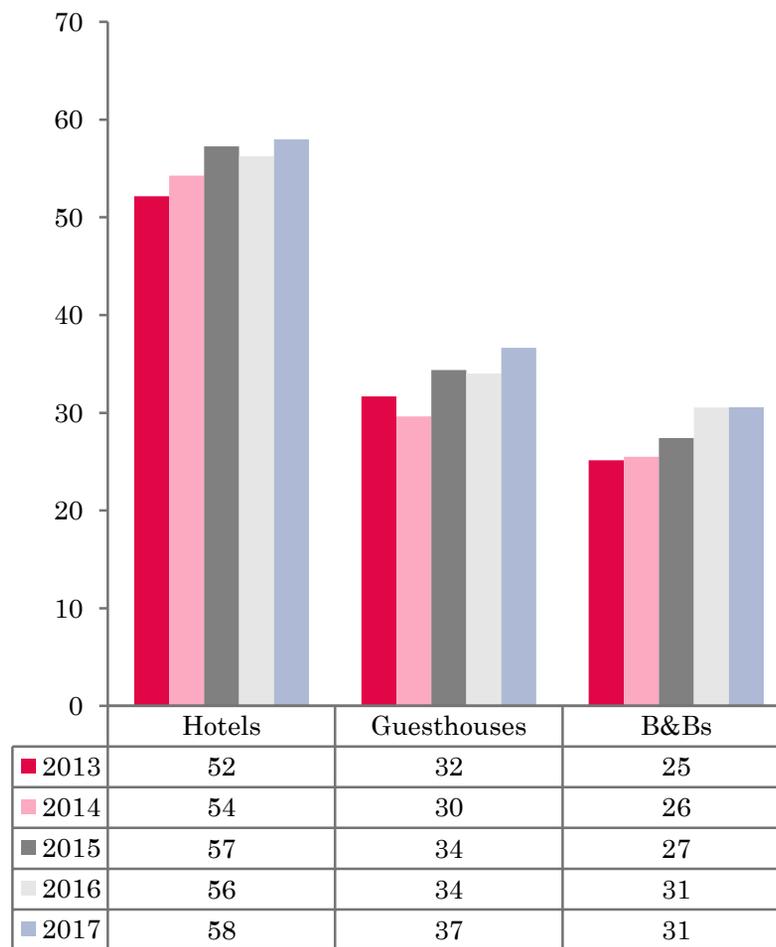
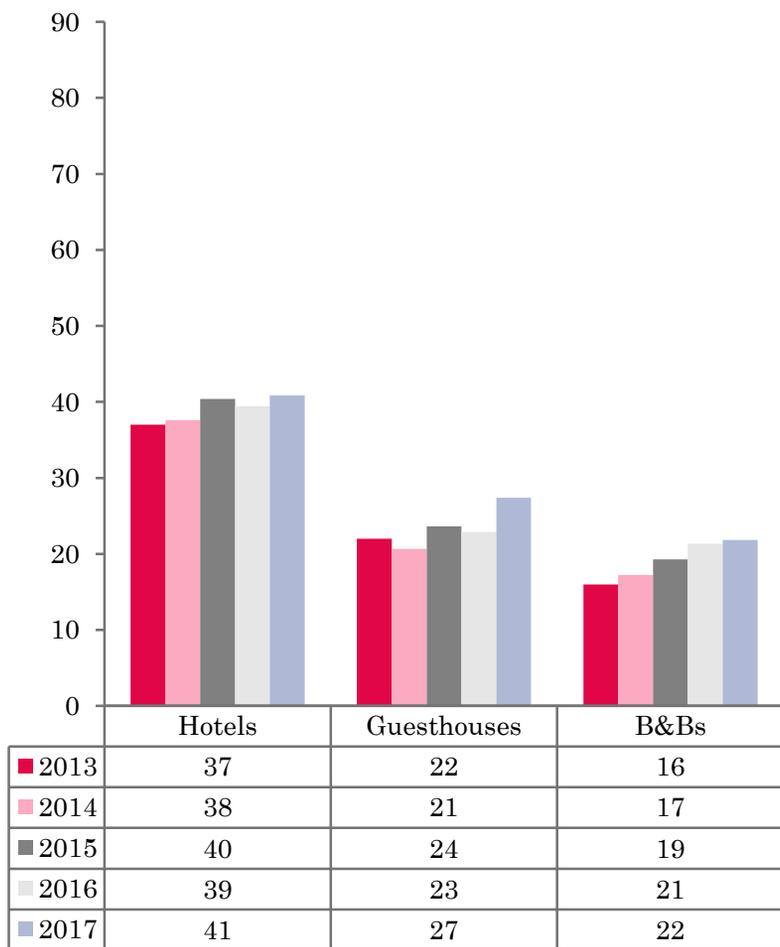
Table 2: UK/Non UK Occupancy Levels January 2015 – 2017 (see note 5a and 5b Slide 19)

	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	25	23	23	2	2	2	5	6	5	7	9	7	1809	1780	1716
Northern Ireland	17	12	13	11	13	22	23	29	26	39	52	62	172	192	212
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	239	231	113
Wales	22	22	24	1	1	1	**	**	**	3	3	1	195	191	194
UK	25	23	23	2	2	2	5	6	5	8	9	8			



UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JANUARY 2013-2017

UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION JANUARY 2013-2017



- Both room and bedspace occupancy levels in hotel establishments in the UK increased by 2% during January compared to the same period in 2016. In the guesthouse sector bed occupancy saw an increase of 4% during this month, with room occupancy up by 3% when compared to January 2016. B&B establishments saw no change in both measures of occupancy during January compared to 2016 data.
- At the UK level, bed occupancy levels had increased in four out of the six size bandings when compared with January 2016. Both the 11-25 and 51-100 size bands saw bed occupancy levels increase by 7% and 6% respectively, with both the 1-3 and >100 size bands bed occupancy up by 3% when compared with January 2016. Room occupancy levels also increased in four out of the six size bandings when compared to the same period in 2016. The 1-3 and >100 size bands increased by 3%. The 11-25 size band increased by 5% on 2016 data with the 51-100 size banding witnessing the largest increase, up 7% when compared with the same period the previous year. Only the 4-10 and 26-50 size bands saw a fall in both measures of occupancy during this month.
- Seaside, countryside/village and city/large town locations increased in both room and bedspace occupancy levels during January 2017. Both seaside and city/large town locations saw an increase of 3% in bed occupancy during January, up to 30% and 47% respectively. Countryside/village locations bed occupancy had increased by 4% when compared to January 2016, with small town locations falling by 2%. In January 2017, seaside locations saw the largest increase in room occupancy when compared to January 2016, up by 6%. City/large town and countryside/village locations witnessed an increase in room occupancy with occupancy levels up by 2% and 3% respectively. Small town locations remained flat in both measures of occupancy during January 2017.
- Bed occupancy levels increased in both the £50.00-£59.99 and >£60.00 tariff bands during January 2017, a 7% and 2% increase respectively. All other tariff bands remained flat or fell slightly in bed occupancy during this month. A similar picture was found in room occupancy, with only the £50.00-£59.99 and >£60.00 tariff bands witnessing an increase in room occupancy, up by 3% and 2% respectively. All other tariff bands either decreased or remained flat when compared with January 2016 data.

Table 3: Occupancy Levels by Type of Establishment: January 2015 – 2017

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	41	40	41	58	57	59	1455	1457	1450
Northern Ireland	35	30	43	50	41	58	68	78	78
Scotland	40	36	41	58	53	50	193	193	61
Wales	34	35	35	47	49	48	162	160	158
UK	40	39	41	57	56	58	1878	1888	1747
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	24	24	29	35	36	38	131	119	99
Northern Ireland	15	14	19	19	19	26	15	25	36
Scotland	26	13	15	38	17	28	17	13	23
Wales	15	19	15	21	25	23	15	17	15
UK	24	23	27	34	34	37	178	174	173
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	22	23	23	31	33	32	223	204	167
Northern Ireland	7	7	8	11	9	11	89	89	98
Scotland	10	9	14	16	13	23	29	25	29
Wales	7	10	13	9	11	15	18	14	21
UK	19	21	22	27	31	31	359	332	315



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: January 2015 – 2017 (see notes 5a & 5b Slide 19)

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	38	39	41	39	38	38	47	48	51	60	61	60
Northern Ireland	33	29	41	24	19	29	42	36	50	37	30	45
Scotland	44	33	31	35	29	26	55	42	39	60	49	40
Wales	33	35	36	28	28	28	39	41	43	43	44	44
UK	38	38	40	38	37	37	48	47	50	59	59	58



Table 35: Non-UK Percentages: January 2015 – 2017 (see notes 5a & 5b Slide 19)

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	4	4	4	6	8	6	5	8	5	8	10	8
Northern Ireland	21	26	23	24	33	26	23	36	37	25	41	37
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	2	2	1	4	3	2
UK	4	4	4	6	8	6	5	8	5	8	10	8

**** FIGURES NOT AVAILABLE**



Table 6: Occupancy Levels by Size: January 2015 - 2017

A: Percentage of Bedspace Occupancy												
	1 - 3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	15	15	18	105	21	22	19	158	29	26	33	67
Northern Ireland	4	4	7	84	11	12	15	38	19	19	25	31
Scotland	9	7	14	15	22	19	16	34	34	31	33	29
Wales	9	11	13	19	17	21	20	24	29	30	33	20
UK	14	14	17	223	21	22	19	254	29	26	33	147

Table6: Occupancy Levels by Size: January 2015 - 2017

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	37	37	32	44	36	30	36	24	45	44	46	1318
Northern Ireland	19	27	31	24	37	29	40	24	42	34	52	11
Scotland	35	31	41	15	43	42	42	12	41	39	50	8
Wales	32	30	27	18	35	40	37	8	39	40	42	105
UK	36	36	33	101	37	31	37	68	44	43	46	1442



Table 7: Occupancy Levels by Size: January 2015 – 2017

B:Percentage of Bedroom Occupancy												
	1 -3 Rooms				4 – 10 Rooms				11 – 25 Rooms			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	23	23	25	105	31	34	29	158	43	40	46	67
Northern Ireland	6	6	10	84	16	16	22	38	28	28	39	31
Scotland	15	11	31	15	32	26	21	34	46	46	41	29
Wales	11	11	14	19	24	27	27	24	39	39	39	20
UK	21	22	25	375	30	33	28	254	43	40	45	147

Table 7: Occupancy Levels by Size: January 2015 - 2017

B (cont): Percentage of Bedroom Occupancy												
	26 – 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	49	52	50	44	50	47	55	24	64	63	66	1318
Northern Ireland	40	32	39	24	46	41	55	24	60	45	67	11
Scotland	50	48	50	15	60	59	53	12	59	57	60	8
Wales	43	41	38	18	42	54	49	8	57	59	62	105
UK	49	51	50	101	51	48	55	68	63	62	65	1442



Table 8: Occupancy Levels by Location Type: January 2015 - 2017

A: Percentage Bedspace Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	29	27	30	128	46	44	47	1014	34	34	32	340	27	26	29	234
Northern Ireland	16	20	25	50	37	30	44	73	17	17	21	58	11	11	17	31
Scotland	34	28	28	23	40	39	49	19	34	20	18	30	48	21	28	41
Wales	31	31	30	26	37	50	32	9	17	24	19	10	20	20	22	47
UK	29	27	30	227	45	44	47	1115	33	32	30	438	29	25	29	353

Table 8: Occupancy Levels by Location Type: January 2015 - 2017

B:Percentage Bedroom Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	44	42	48	128	64	63	65	1014	51	52	51	340	40	39	42	234
Northern Ireland	22	27	33	50	52	39	58	73	23	24	30	58	15	16	25	31
Scotland	50	39	39	23	60	57	59	19	48	36	30	30	50	31	38	41
Wales	37	37	35	26	51	59	49	9	30	36	31	10	28	28	30	47
UK	44	41	47	227	63	62	64	1115	49	50	49	438	40	38	41	353

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 2015 – 2017 (see note 5a Slide 19)

A: Percentage of Bedspace Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	12	16	13	12	12	13	10	49
Northern Ireland	**	**	**	**	4	4	7	11	10	8	10	37
Scotland	**	**	**	**	23	16	****	0	16	9	10	15
Wales	**	**	**	**	8	9	****	2	13	16	12	14
UK	**	**	**	**	13	16	13	23	13	13	10	115

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 2015 – 2017 (see note 5a Slide 19)

B: Percentage of Bedspace Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	22	20	20	67	28	27	34	55	41	40	42	1486
Northern Ireland	16	19	19	44	40	24	28	21	35	30	41	99
Scotland	34	16	14	22	31	29	37	11	41	38	43	65
Wales	17	18	19	14	25	30	25	12	36	37	37	152
UK	23	20	19	147	29	27	34	99	41	40	42	1802

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 2015 – 2017 (see note 5a Slide 19)

A: Percentage of Bedroom Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	20	22	20	12	20	22	16	49
Northern Ireland	**	**	**	**	7	5	10	11	13	12	14	37
Scotland	**	**	**	**	43	18	****	0	22	15	16	15
Wales	**	**	**	**	15	14	****	2	19	23	19	14
UK	**	**	**	**	23	21	20	23	20	21	16	115

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 2015 – 2017 (see note 5a Slide 19)

B: Percentage of Bedroom Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	34	32	29	67	37	38	42	55	57	58	60	1486
Northern Ireland	25	26	29	44	50	32	37	21	51	40	55	99
Scotland	48	28	24	22	47	48	47	11	59	55	51	65
Wales	26	38	42	14	32	40	35	12	50	49	47	152
UK	35	32	29	147	38	39	42	99	57	57	59	1802

** 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)

