



UNITED KINGDOM OCCUPANCY SURVEY

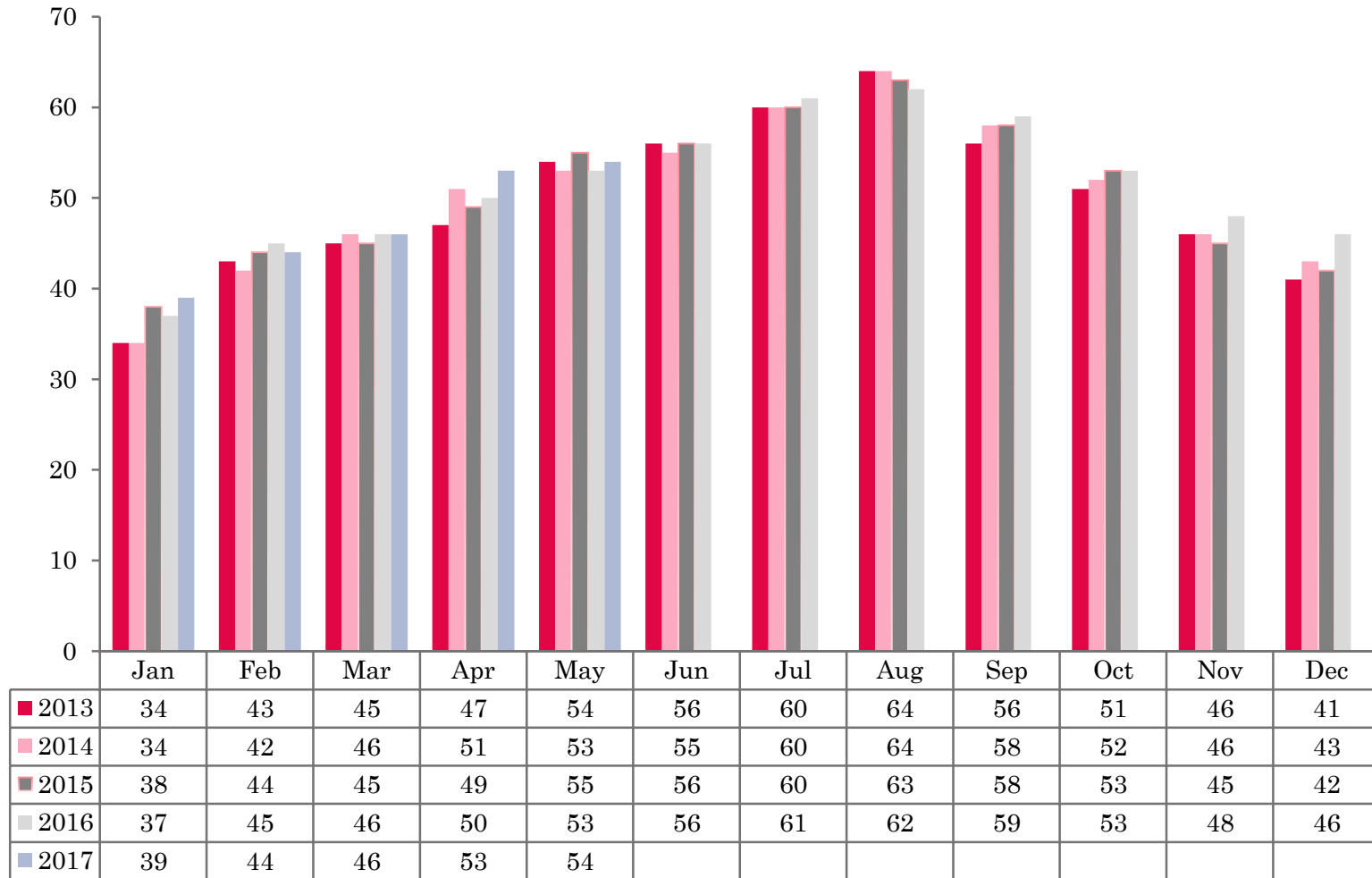
Serviced Accommodation
Summary Report May 2017

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



- ❖ 2,287 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 saw a small increase of 1% when compared to May 2016, up to 54% compared to 53% for the same period last year. Room occupancy levels in the UK during May 2017, witnessed a rise of 2% when compared with 2016 data, up from 71% to 73%.



- Room occupancy levels in the UK saw a rise of 2% during May 2017, when compared with the same period the previous year. Bed occupancy also rose by 1%.
- Both room and bed occupancy levels in England rose by 1% during May 2017. Room was up from 72% to 73% with bed occupancy up by the same percentage, from 53% in 2016 to 54% in May 2017.
- Room occupancy levels in Northern Ireland increased by 2% during May 2017. Bed occupancy levels remained on a par when compared with the same period the previous year.
- Room occupancy in Wales increased by 4% during May 2017 when compared to the same period in 2016, with bedspace occupancy also witnessing a rise of 3%, up from 47% in 2016 to 50% in May 2017.
- Occupancy levels across Scotland was up during May 2017 when compared to the same period in 2016. Room occupancy had increased by a healthy 5% whilst bedspace occupancy increased by 3%, back to the levels seen in 2015 (57%).
- 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 1% when compared with May 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: May 2015 – 2017

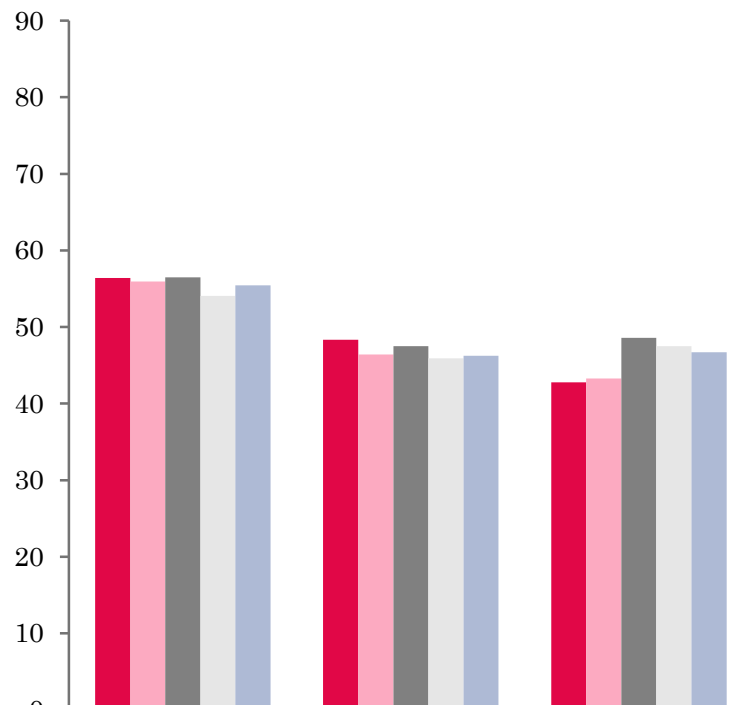
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	55	53	54	72	72	73	1868	1801	1711
Northern Ireland	49	51	51	65	66	68	192	176	190
Scotland	57	54	57	72	69	74	283	263	185
Wales	52	47	50	66	61	65	210	220	201
UK	55	53	54	72	71	73	2553	2460	2287

Table 2: UK/Non UK Occupancy Levels May 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	44	41	40	5	5	5	10	11	10	11	11	11	1868	1801	1711
Northern Ireland	22	19	17	27	32	33	46	40	39	56	63	66	192	176	190
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	283	263	185
Wales	45	40	40	4	3	3	**	**	**	8	8	7	210	220	201
UK	44	41	40	5	5	5	11	11	10	12	12	12	2553	2460	2287

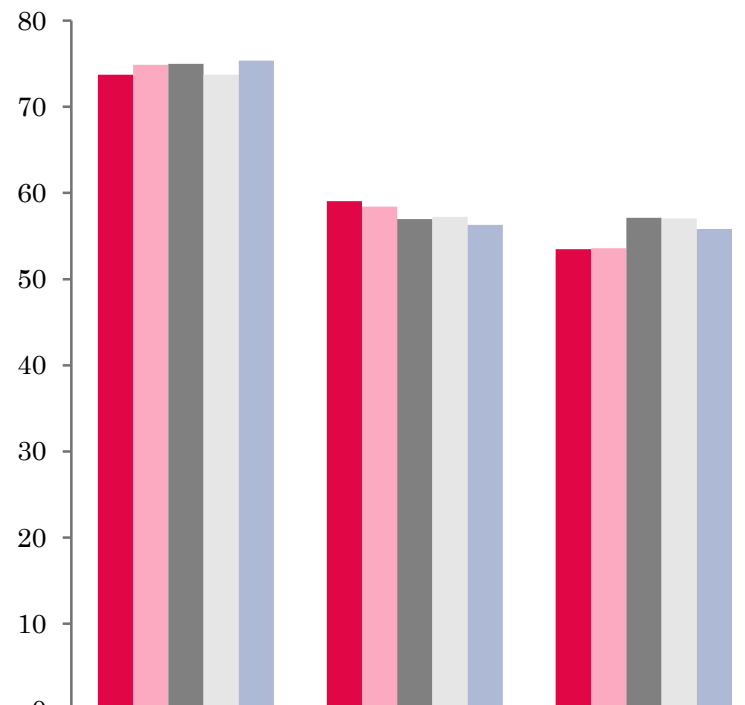


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MAY 2013-2017



	Hotels	Guesthouses	B&Bs
■ 2013	56	48	43
■ 2014	56	46	43
■ 2015	56	47	49
■ 2016	54	46	48
■ 2017	55	46	47

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



	Hotels	Guesthouses	B&Bs
■ 2013	74	59	53
■ 2014	75	58	54
■ 2015	75	57	57
■ 2016	74	57	57
■ 2017	75	56	56



- Both room and bedspace occupancy levels in hotel establishments in the UK remained flat (+1%) during May 2017. A similar picture was seen in both the guesthouse and B&B sector. Room occupancy in guesthouses remained flat (-1%) and bed occupancy remained on a par with the same period in 2016. Both room and bedspace occupancy levels in B&B's remained flat, (-1%) when compared with the previous year.
- At the UK level, bed occupancy levels had increased in three out of six size bands when compared with May 2016. The 11-25, 51-100 and >100 size bands all increased by 3%, 4% and 3% respectively, with the 1-3 and 26-50 size bands on a par with May 2016. Only the 4-10 size band saw a fall in bed occupancy levels this month. Room occupancy in the 26-50 size band saw the highest increase, up by 3% when compared with May 2016. The 1-3 band rose by 2%, with both the 11-25 and >100 remaining fairly flat (+1%). Only the 4-10 and 51-100 size band fell in room occupancy levels during May 2017, down by 3% respectively when compared to the same period in 2016.
- Bedspace occupancy in both city/large towns and countryside/village locations remained flat during May 2017, with bed occupancy levels in small town locations increasing during this month, up 2%. Only seaside locations witnessing a downturn, falling from 49% in 2016 to 47% in May 2017. Room occupancy remained flat in city/large town locations during May 2017 (+1%) when compared to the same period the previous year. All other locations fared better with seaside and small town locations up 2%, with room occupancy in countryside/village locations seeing the biggest increase, up 4% when compared to May 2016.
- Bed occupancy levels in two of the smaller tariff bands remained static during May 2017. The £40.00-£49.99 tariff band fell from 48% to 44% when compared to the same period in 2016. The largest tariff band, >£60.00 remained flat (+1%) whilst bed occupancy in the £50.00-£59.99 tariff band rose significantly, up 7% during May 2017. Room occupancy saw less movement, with four out of the five tariff bands remaining flat during May 2017. As with bed occupancy, the £40.00-£49.99 tariff band fell during this period, down 2% from 60% in 2016 to 58% in May 2017.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	56	54	55	75	74	75	1463	1447	1446
Northern Ireland	58	56	56	76	74	76	82	79	78
Scotland	59	56	60	76	74	80	197	195	95
Wales	56	49	54	71	65	71	167	172	163
UK	56	54	55	75	74	75	1909	1893	1782
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	48	46	46	58	58	56	156	132	100
Northern Ireland	24	36	39	33	45	51	16	18	22
Scotland	51	48	53	59	54	64	34	27	56
Wales	39	41	37	45	49	45	21	22	17
UK	47	46	46	57	57	56	227	199	195
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	49	48	47	58	58	57	249	222	165
Northern Ireland	27	34	33	32	39	39	94	79	90
Scotland	54	47	51	62	55	54	52	41	34
Wales	35	40	32	40	42	33	23	26	21
UK	49	48	47	57	57	56	418	368	310



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: May 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	58	58	59	51	49	50	71	71	72	72	72	72
Northern Ireland	54	54	56	40	41	44	66	65	70	58	58	65
Scotland	61	58	64	53	51	54	71	69	76	73	71	75
Wales	59	56	58	46	52	44	68	64	68	63	58	62
UK	58	58	59	51	49	50	71	71	72	71	71	72



Table 35: Non-UK Percentages: May 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	8	9	8	12	12	13	10	10	10	12	13	14
Northern Ireland	40	38	37	47	45	42	44	47	49	51	54	53
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	7	7	7	9	7	8
UK	9	9	8	13	12	13	11	10	10	13	13	14

**** FIGURES NOT AVAILABLE**



Table 6: Occupancy Levels by Size: May 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	41	39	40	105	46	44	41	159	52	50	52	67
Northern Ireland	18	22	25	77	29	49	44	25	40	36	40	31
Scotland	46	47	52	16	58	48	50	53	58	56	60	61
Wales	38	42	29	21	41	40	37	23	56	44	54	22
UK	41	40	40	219	47	44	42	260	53	50	53	181

Table 6: Occupancy Levels by Size: May 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	59	53	51	41	50	49	53	21	58	56	57	1306
Northern Ireland	56	55	54	22	56	52	56	25	63	63	58	10
Scotland	58	60	68	32	61	56	64	16	57	56	59	7
Wales	55	45	51	19	66	63	67	8	56	52	55	108
UK	59	53	53	114	53	50	54	70	58	56	57	1431



Table 7: Occupancy Levels by Size: May 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	51	48	50	105	57	57	54	159	64	64	64	67
Northern Ireland	23	28	31	77	34	51	47	25	53	52	58	31
Scotland	55	56	64	16	66	56	58	53	72	72	76	61
Wales	44	43	30	21	49	49	47	23	63	54	62	22
UK	51	48	50	375	57	57	54	260	65	64	65	181

Table 7: Occupancy Levels by Size: May 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	70	68	70	41	67	70	67	21	80	79	80	1306
Northern Ireland	67	68	69	22	74	70	78	25	84	82	81	10
Scotland	75	75	80	32	78	76	87	16	81	77	82	7
Wales	69	57	69	19	74	71	77	8	79	76	80	108
UK	71	68	71	114	69	71	69	70	80	79	80	1431



Table 8: Occupancy Levels by Location Type: May 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	48	48	46	139	60	56	57	1009	50	50	52	337	52	50	51	226
Northern Ireland	42	44	48	48	61	58	58	69	32	34	35	50	22	35	27	23
Scotland	58	55	55	34	59	57	59	38	49	50	55	42	57	50	59	71
Wales	57	50	51	30	46	42	54	7	56	52	55	11	44	41	43	48
UK	50	49	47	251	59	56	57	1123	50	50	52	440	52	50	51	368

Table 8: Occupancy Levels by Location Type: May 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	64	61	63	139	79	78	78	1009	69	70	72	337	65	62	66	226
Northern Ireland	53	56	61	48	78	75	77	69	42	46	48	50	33	45	37	23
Scotland	72	70	73	34	79	76	81	38	65	68	69	42	67	59	66	71
Wales	65	58	57	30	65	61	75	7	70	58	73	11	53	51	54	48
UK	65	62	64	251	78	77	78	1123	68	69	71	440	64	61	65	368

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	**	**	**	**	33	27	25	19	39	35	34	47
Northern Ireland	**	**	**	**	19	12	30	8	20	36	30	31
Scotland	**	**	**	**	**	43	61	4	44	39	47	21
Wales	**	**	**	**	20	21	**	2	36	35	30	16
UK	**	**	**	**	32	28	28	31	39	35	35	115

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	48	48	43	72	49	46	54	54	57	54	56	1492
Northern Ireland	42	46	41	44	56	37	42	20	59	57	55	87
Scotland	51	51	53	48	61	61	58	25	61	57	46	87
Wales	40	45	43	12	54	42	43	14	57	52	55	155
UK	48	48	44	176	51	47	54	113	58	54	55	1821

** FIGURES NOT AVAILABLE

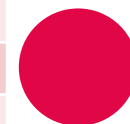


Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 2015 – 2017 (see note 5a Slide 19)

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	**	**	**	**	42	39	34	19	48	43	43	47
Northern Ireland	**	**	**	**	22	18	31	8	25	42	39	31
Scotland	**	**	**	**	**	31	65	4	55	48	56	21
Wales	**	**	**	**	30	23	**	2	45	43	39	16
UK	**	**	**	**	41	38	37	31	48	43	44	115

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	60	59	57	72	61	60	62	54	75	75	75	1492
Northern Ireland	58	57	59	44	70	51	52	20	76	74	74	87
Scotland	63	66	62	48	76	79	61	25	77	74	64	87
Wales	57	58	65	12	65	56	59	14	72	66	70	155
UK	60	60	58	176	64	61	62	113	75	75	74	1821

** 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 2017 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 2017) 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)

