



# UNITED KINGDOM OCCUPANCY SURVEY

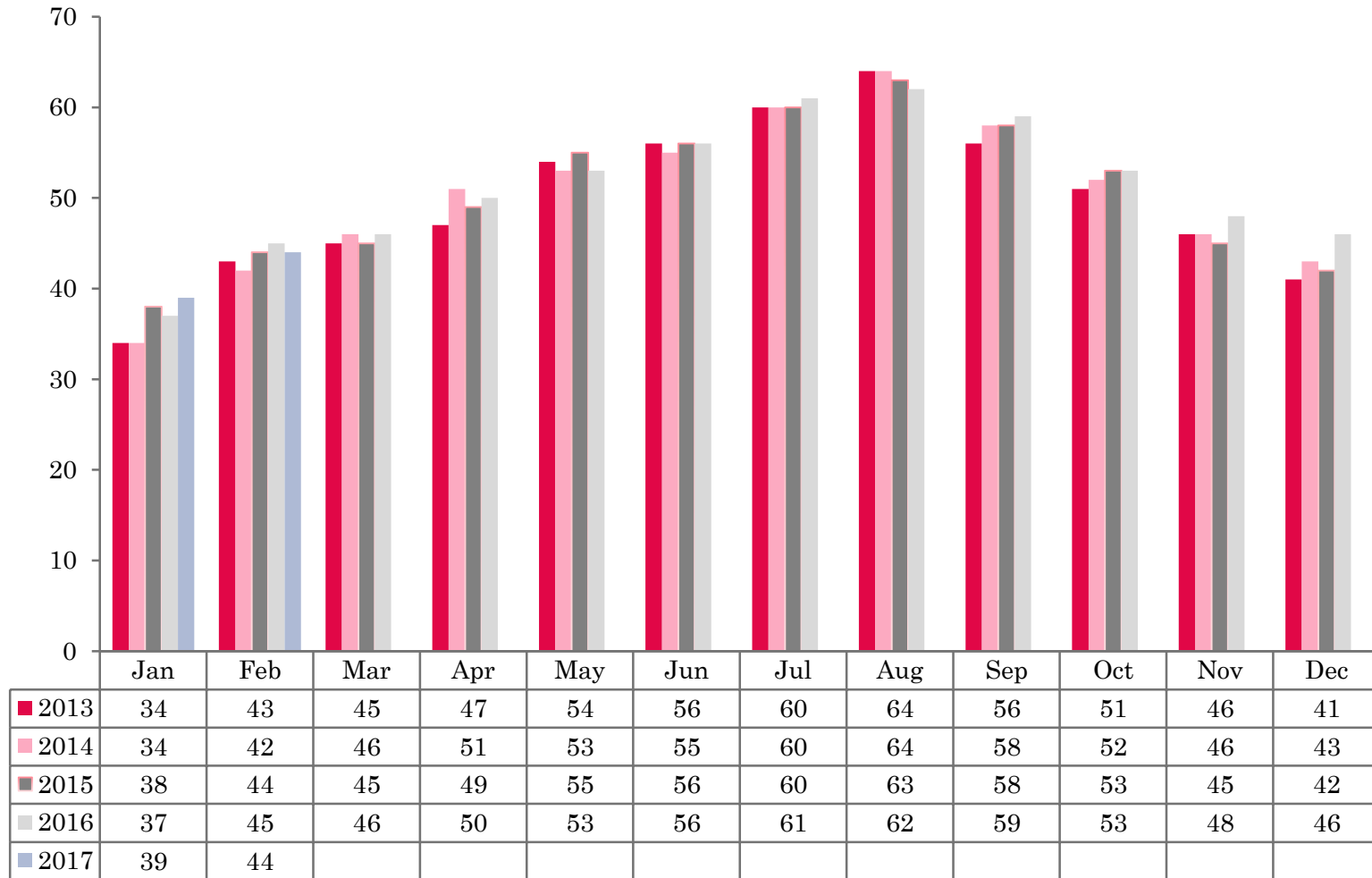
Serviced Accommodation Summary Report  
February 2017

# UK OCCUPANCY SURVEY

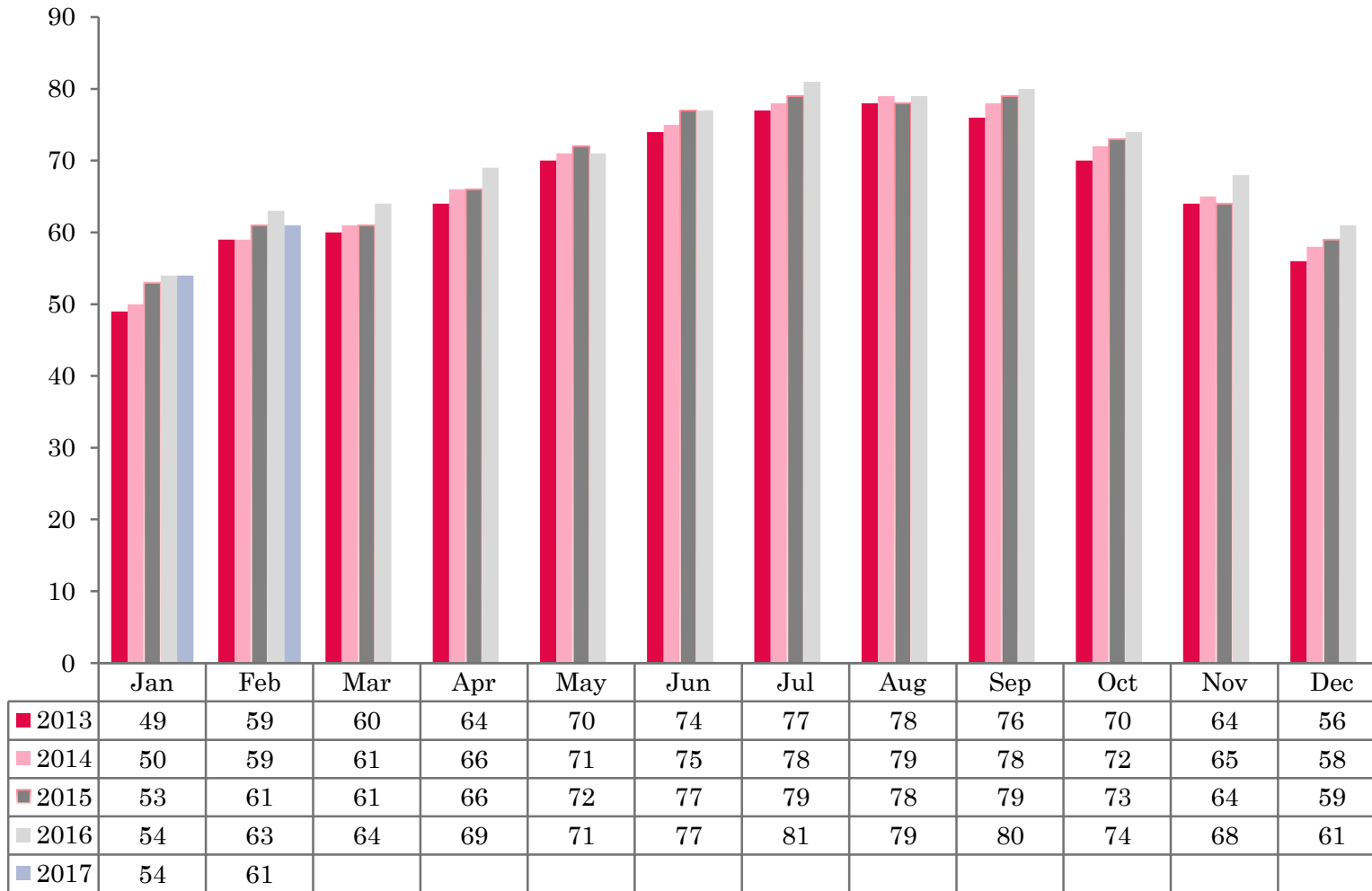
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2013 - 2017



# UK BEDROOM OCCUPANCY 2013 - 2017



- ❖ 2,278 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 44% (-1%) when compared to the same period the previous year. Room occupancy levels in the UK were at 61% during February 2017, a 2% drop in levels compared with 2016 data.



- Room occupancy saw a fall of 2 percentage points, down from 63% to 61% when compared with February 2016. Bedspace occupancy levels remained flat (-1%) when compared with to the same period the previous year.
- Both room and bedspace occupancy levels in England remained flat, at 63% and 45% (-1% respectively), when compared with the same period in 2016.
- Room occupancy levels in Northern Ireland fell by 3% during February 2017, down from 51% to 48%. Bed occupancy also decreased, down 4% from 39% in 2016 to 35% February 2017.
- Room occupancy in Wales witnessed a small increase of 2% in February 2017. Bedspace occupancy remained flat (+1%), when compared to the same period the previous year.
- Room occupancy levels across Scotland fell significantly during February 2017 when compared to the same period in 2016. Room occupancy had fallen by 11% whilst bedspace occupancy decreased by 6% 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 3% when compared with February 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: February 2015 – 2017**

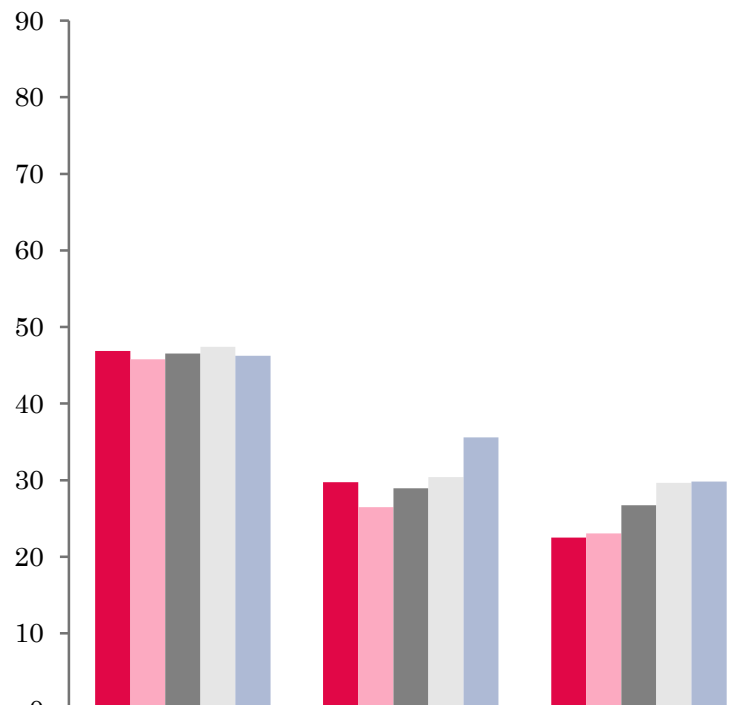
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	46	46	45	63	64	63	1833	1793	1726
Northern Ireland	38	39	35	55	51	48	186	173	212
Scotland	36	37	31	53	53	42	259	235	142
Wales	39	39	40	52	51	53	204	204	198
<b>UK</b>	44	45	44	61	63	61	2482	2405	2278

**Table 2: UK/Non UK Occupancy Levels February 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	32	31	29	2	3	3	5	5	5	7	8	8	1833	1793	1726
Northern Ireland	19	20	13	20	19	22	29	28	26	52	48	62	186	173	212
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	259	235	142
Wales	29	26	29	1	2	1	**	**	**	3	7	4	204	204	198
<b>UK</b>	31	31	29	2	3	3	6	5	5	8	9	9	2482	2405	2278

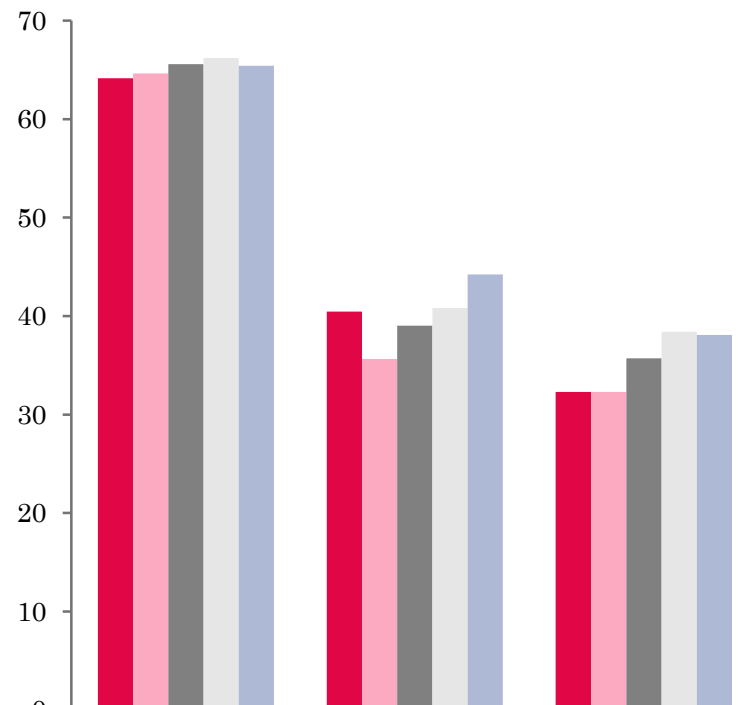


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION FEBRUARY 2013-2017



	Hotels	Guesthouses	B&Bs
2013	47	30	22
2014	46	26	23
2015	47	29	27
2016	47	30	30
2017	46	36	30

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION FEBRUARY 2013-2017



	Hotels	Guesthouses	B&Bs
2013	64	40	32
2014	65	36	32
2015	66	39	36
2016	66	41	38
2017	65	44	38





- Both room and bedspace occupancy levels in hotel establishments in the UK remained flat (-1%) during February 2017 compared to the same period in 2016. The guesthouse sector fared best with increases in both bed occupancy, up 6% during this month, and room occupancy up by 3% when compared to February 2016. B&B establishments saw no change in both measures of occupancy during February compared to 2016 data.
- At the UK level, bed occupancy levels had increased in only the 1-3 size band when compared with February 2016. The 4-10, 11-25, 51-100 and 100+ size bands saw bed occupancy levels remain flat when compared with February 2016. Bedspace occupancy in the 26-50 size band fell by 2%. Room occupancy levels followed a similar pattern with the 26-50 and 100+ size bandings on a par with February 2016. The 1-3, 4-10 and 51-100 bands all fell by 2% whilst the 11-25 size band fell by 3% when compared with the same period the previous year.
- Bedspace occupancy across all locations remained flat during February 2017. Only seaside locations saw an increase in bedroom occupancy levels during the month, up 3% from 51% in February 2016 to 54% in the same month in 2017. Small town and countryside/village locations remained flat (-1% and +1% respectively), whilst City/large town locations fell by 3%, down from 71% in 2016 to 68% in February 2017.
- Bed occupancy levels increased in both the £20.00-£29.99 and £50.00-£59.99 tariff bands during February 2017, a 10% and 4% increase respectively. All other tariff bands remained flat or fell slightly in bed occupancy during this month. Only the £20.00-£29.99 tariff band witnessed an increase in room occupancy, up by 6%. All other tariff bands either decreased or remained flat when compared with February 2016 data.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	48	48	47	67	67	67	1455	1460	1451
Northern Ireland	46	45	43	64	59	58	74	76	78
Scotland	39	43	39	60	61	51	201	198	74
Wales	45	43	45	60	59	61	168	167	159
<b>UK</b>	47	47	46	66	66	65	1898	1901	1762
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	31	32	37	42	43	46	147	125	103
Northern Ireland	13	20	19	25	37	26	19	23	36
Scotland	25	17	28	32	22	34	24	16	33
Wales	15	23	21	19	28	27	16	19	16
<b>UK</b>	29	30	36	39	41	44	206	183	188
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
England	29	32	32	39	41	41	231	208	172
Northern Ireland	10	14	8	15	19	11	93	74	98
Scotland	21	13	13	27	22	16	34	21	35
Wales	15	12	19	18	14	22	20	18	23
<b>UK</b>	27	30	30	36	38	38	378	321	328



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: February 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	47	49	48	44	44	44	57	60	58	66	67	66
Northern Ireland	45	44	41	29	27	29	60	53	50	50	42	45
Scotland	37	42	38	34	34	26	52	52	45	54	55	39
Wales	45	45	41	34	33	28	53	52	48	52	50	41
<b>UK</b>	45	48	47	42	43	42	56	59	57	63	65	63



**Table 35: Non-UK Percentages: February 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	7	6	7	8	6	9	9	9
Northern Ireland	26	24	23	24	28	26	29	33	37	27	34	37
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	7	3	4	8	4
<b>UK</b>	5	4	4	6	7	6	7	8	6	9	9	9

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: February 2015 - 2017**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	22	19	23	110	28	29	28	161	36	37	37	72
Northern Ireland	5	11	7	84	15	18	15	38	27	26	25	31
Scotland	16	14	13	16	31	23	23	43	36	37	33	43
Wales	16	11	19	20	23	24	25	24	43	38	42	23
<b>UK</b>	20	18	22	230	28	28	27	266	36	37	37	169

**Table6: Occupancy Levels by Size: February 2015 - 2017**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	45	45	42	40	40	42	40	25	52	52	53	1306
Northern Ireland	24	36	31	24	46	42	40	24	53	52	52	11
Scotland	37	40	49	19	33	51	59	13	50	46	39	8
Wales	39	38	38	17	52	53	50	8	49	49	50	106
<b>UK</b>	43	44	42	100	40	43	42	70	52	51	52	1431



**Table 7: Occupancy Levels by Size: February 2015 – 2017**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 -3 Rooms</b>				<b>4 – 10 Rooms</b>				<b>11 – 25 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	31	27	30	110	38	41	39	161	50	52	49	72
Northern Ireland	9	16	10	84	22	23	22	38	38	39	39	31
Scotland	23	24	16	16	39	30	28	43	47	50	46	43
Wales	18	12	22	20	28	30	31	24	49	49	49	23
<b>UK</b>	29	26	28	375	37	40	38	266	49	52	49	169

**Table 7: Occupancy Levels by Size: February 2015 - 2017**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 – 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	59	60	59	40	57	61	59	25	75	73	75	1306
Northern Ireland	54	48	39	24	59	56	55	24	70	67	67	11
Scotland	54	60	62	19	67	69	72	13	71	67	51	8
Wales	54	52	52	17	62	65	61	8	72	72	74	106
<b>UK</b>	58	60	59	100	59	62	60	70	74	72	73	1431



**Table 8: Occupancy Levels by Location Type: February 2015 - 2017**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	35	37	36	131	53	51	51	1016	42	42	41	340	35	35	36	239
Northern Ireland	24	26	25	50	49	46	44	73	23	27	21	58	11	18	17	31
Scotland	34	36	34	28	40	46	37	35	30	29	24	32	32	27	29	45
Wales	41	38	38	30	44	42	43	8	30	32	31	11	27	27	30	46
<b>UK</b>	35	37	36	239	51	50	50	1132	39	40	39	441	34	34	35	361

**Table 8: Occupancy Levels by Location Type: February 2015 - 2017**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	50	52	56	131	73	72	70	1016	60	61	61	340	50	48	50	239
Northern Ireland	36	32	33	50	66	60	58	73	32	37	30	58	21	28	25	31
Scotland	45	46	42	28	67	66	50	35	43	49	37	32	41	38	39	45
Wales	49	44	43	30	63	61	63	8	42	43	45	11	35	36	38	46
<b>UK</b>	49	51	54	239	71	71	68	1132	56	59	58	441	47	47	48	361

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

**A: Percentage of Bedspace Occupancy**

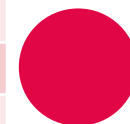
	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	13	17	27	10	17	18	17	58
Northern Ireland	**	**	**	**	7	1	7	11	11	17	10	37
Scotland	**	**	**	**	16	15	****	0	21	18	14	23
Wales	**	**	**	**	6	14	****	2	18	17	19	15
<b>UK</b>	**	**	**	**	13	17	27	21	17	18	17	133

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

**B: Percentage of Bedspace Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	29	28	26	72	37	39	43	57	49	48	48	1528
Northern Ireland	27	27	19	44	50	30	28	21	45	45	41	99
Scotland	28	23	25	33	42	42	44	12	41	44	33	74
Wales	18	26	31	14	34	31	32	16	46	45	45	152
<b>UK</b>	28	28	26	163	38	39	43	106	48	48	47	1853

\*\* FIGURES NOT AVAILABLE





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

**A: Percentage of Bedroom Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	**	**	**	**	27	28	33	10	25	25	24	58
Northern Ireland	**	**	**	**	13	3	10	11	17	22	14	37
Scotland	**	**	**	**	33	19	****	0	27	29	18	23
Wales	**	**	**	**	9	19	****	2	22	24	28	15
<b>UK</b>	**	**	**	**	27	27	33	21	25	25	24	133

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

**B: Percentage of Bedroom Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017	2015	2016	2017	Sample Size 2017
England	41	40	38	72	48	52	52	57	67	67	67	1528
Northern Ireland	36	42	29	44	67	41	37	21	63	59	55	99
Scotland	41	40	37	33	58	56	54	12	63	61	44	74
Wales	42	46	51	14	42	41	45	16	62	58	58	152
<b>UK</b>	41	40	38	163	50	52	52	106	66	66	65	1853

\*\* 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 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)

