



UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation
Annual Report 2015

May 2016

the **research** solution

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INTRODUCTION

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2015 which is jointly 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.

This report has been compiled by Christine King at The Research Solution.



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SUMMARY: BEDROOM OCCUPANCY

- The UK average annual bedroom occupancy for 2015 remained flat (+1 percentage point) when compared to 2014 data. Both Scotland and Northern Ireland increased by 2 percentage points, with Wales witnessing the largest movement, with bedroom occupancy levels up by 4 percentage points. England was similar to the UK with no movement.
- The monthly UK bedroom occupancy levels saw increases of 2 percentage points or more, in 3 out of the 12 months during 2015 with the remaining months flat on 2014 levels. January rose by 3 percentage points, with February and June rising by 2 percentage points respectively during 2015, with July and September recording the highest levels of bedroom occupancy throughout the year (79%).
- Bedroom Occupancy levels in England increased by 2 percentage points in January, February and June. All other months during 2015 remained on a par with levels witnessed in 2014.
- Scotland saw a significant increase in bedroom occupancy levels during January, rising by 16 percentage points when compared to the same period the previous year. A 2 percentage point increase in both February and May meant a positive start to 2015. Both August and November were the only months with a drop in room occupancy, down 3% on 2014 data. The remaining months remained flat against levels achieved in the previous year.
- Wales fared well during 2015 with occupancy levels increasing during 10 out of the 12 months. March, June, September and October all recorded increases of 5 percentage points each. The largest increase was in November and December with levels up by 9% respectively.
- Northern Ireland room occupancy levels increased in 5 out of the 12 months during 2015, with only August and November decreasing in room occupancy. The biggest

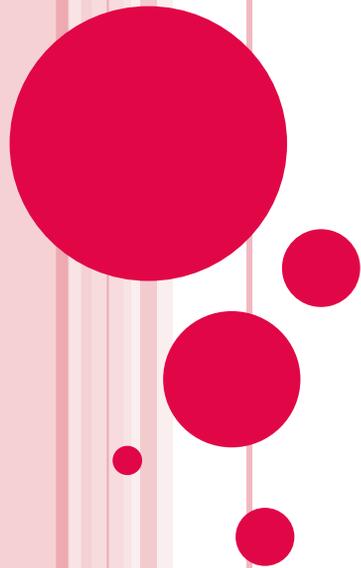
SUMMARY: BEDSPACE OCCUPANCY

- UK bedspace occupancy levels remained flat against 2014 throughout most of the year, with the exception of January, February and May where bedspace levels increased by 4, 4 and 2 percentage points respectively.
- England bedspace occupancy levels were similar to the UK with an increase in both January and February of 3 and 2 percentage points respectively. All other months remained static with 2014 levels, with the exception of April where a 3 percentage point decrease was seen.
- Scotland increased by 11 percentage points in January, and 3 percentage points during May. Both August and November fell by 2 percentage points, with all other months during 2015 witnessing no change in bedspace occupancy levels.
- Wales bedspace occupancy increased in 11 out of the 12 months during 2015. The largest increase was found in February, March and December where bedspace occupancy saw increases of 6 percentage points respectively. October and November rose by 5 percentage points compared to 2014, with January and June up 4 percentage points. The remaining months, aside from August which remained static, all increased by either 2 or 3 percentage points when compared to 2014.
- Northern Ireland bedspace occupancy levels increased in 10 out of the 12 months in 2015. The largest of these was in July, where bedspace occupancy levels increased by 11 percentage points. It was a good start to 2015 with February, March and April all increasing by 9, 8 and 7 percentage points respectively. All other months increased in bedspace occupancy, apart from September which remained flat and November witnessing a decrease, down 3 percentage points on 2014 data.

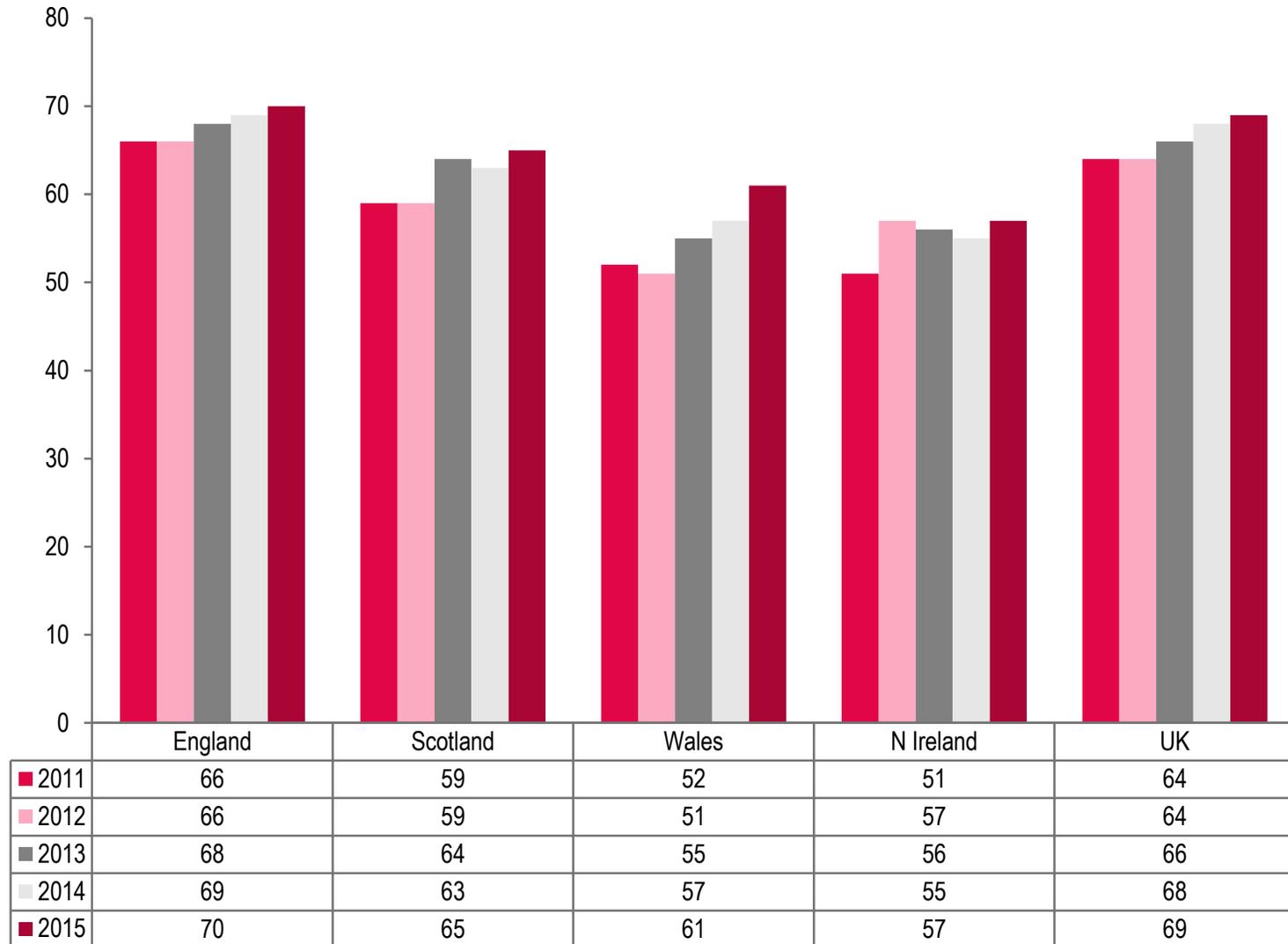
SUMMARY: ROOM AND BEDSPACE OCCUPANCY IN DETAIL

- Across the UK as a whole, weekday bedroom and bedspace occupancy levels remained flat (+1 percentage point) when compared to 2014. Scotland fared best in weekday room and bedspace occupancy figures, with room up 8 percentage points and bedspace 3 percentage points on 2014 data. Room occupancy in Wales increased by a healthy 6 percentage points, with bedspace increasing by 3 percentage points. England room occupancy increased by 2 percentage points, with bedspace remaining flat (+1 percentage point). Northern Ireland room occupancy fell during 2015, down by 3 percentage points in weekday bedroom occupancy whilst bedspace occupancy remained flat compared to 2014.
- Both the UK weekend bedroom occupancy and bedspace occupancy remained on a par with the previous year. Scotland and Wales saw increases in both weekend bedroom and bedspace occupancy, up 8 and 4 percentage points respectively in room occupancy, with bedspace occupancy up 6 percentage points for both. England and Northern Ireland remained flat in both weekend bedroom and bedspace occupancy during 2015.
- Across the UK, bedroom occupancy by type of establishment saw B&B's rise by 2 percentage points. Both guesthouses and Hotel's saw little change from the levels achieved during 2014. Bedroom occupancy levels in England remained flat in both the hotel and guesthouse sector, with B&B's increasing by 2 percentage points. Scotland witnessed an increase of 2 percentage points in the hotels sector, with guesthouses and B&B's remaining on a par with 2014. Wales saw a rise in both the hotel and guesthouse sector of 3 and 4 percentage points respectively, whilst B&B's remained static. Northern Ireland hotel room occupancy increased by 2 percentage points, with guesthouses falling by 6 percentage points and B&B's remaining flat during 2015.
- Bedspace occupancy across all accommodation sectors in England remained on a par with 2014. Scotland saw an increase in bedspace occupancy in the hotel sector, rising by 2 percentage points with guesthouse and B&B's remaining flat. Hotel bedspace occupancy in Wales increased during 2015, up 3 percentage points on 2014 data. Guesthouses also fared well, up 4 percentage points, with B&B's remaining flat. Northern Ireland hotel bedspace occupancy increased by 6 percentage points, with B&Bs rising by 2 percentage points. Guesthouses fared less well, down by 5 percentage points when compared to 2014 data.

BEDROOM OCCUPANCY: UK AND NATIONAL



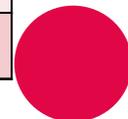
UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY 2011-2015



UK AND NATIONAL: MONTHLY BEDROOM OCCUPANCY 2011-2015

Table 1: UK and National: Bedroom Occupancy 2011- 2015

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15
January	49	50	49	52	54	36	39	52	41	57	33	32	41	39	41	31	35	37	39	40	46	47	49	50	53
February	59	57	60	61	63	46	48	63	51	53	45	40	46	48	52	44	45	45	48	55	56	54	59	59	61
March	62	62	63	64	63	50	50	53	53	54	47	50	48	50	55	44	48	48	45	54	59	59	60	61	61
April	65	65	66	68	68	58	57	58	60	61	54	50	52	58	59	48	60	51	55	58	63	63	64	66	66
May	68	69	71	72	72	67	67	70	70	72	57	55	61	64	66	55	62	61	62	65	67	68	70	71	72
June	75	73	75	76	78	74	73	75	75	76	63	60	60	65	70	65	71	67	65	68	74	72	74	75	77
July	77	72	78	79	80	73	72	77	78	78	64	60	66	69	75	60	70	68	64	64	75	71	77	78	79
August	72	73	77	79	78	79	77	83	82	79	65	65	71	76	75	67	74	74	73	71	72	73	78	79	78
September	76	77	77	79	80	74	73	76	78	77	62	65	63	69	74	60	67	66	64	63	75	75	76	78	79
October	69	71	72	74	75	60	62	65	65	65	53	52	55	61	66	52	59	59	55	54	67	68	70	72	73
November	64	64	67	68	67	52	51	52	56	53	47	44	50	45	54	46	50	52	52	46	61	61	64	65	64
December	55	56	59	61	60	41	41	43	48	49	36	40	43	39	48	38	43	42	41	42	52	53	56	58	57



UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY AVERAGES 2011-2015

Table 1a: UK and National: Bedroom Occupancy Averages 2011 - 2015

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15
April–Oct Average	72	71	74	75	76	69	69	72	73	73	60	58	61	66	69	58	66	64	63	63	70	70	73	74	75
July–Sept Average	75	74	77	79	79	75	74	79	79	78	64	63	67	71	75	63	70	69	67	66	74	73	77	78	79
Annual Average	66	66	68	69	70	59	59	64	63	65	52	51	55	57	61	51	57	56	55	57	64	64	66	68	69



UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS 2011 - 2015

Table 2: UK and National: Bedroom Occupancy Trends 2011 - 2015

	England			Scotland			Wales			Northern Ireland			UK		
	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15
January	49	50	52	42	44	50	35	37	40	34	37	39	47	48	51
February	59	59	61	52	54	56	44	45	49	45	46	49	56	57	60
March	62	63	63	51	52	53	48	49	51	47	47	49	59	60	61
April	65	66	67	58	58	60	52	53	56	53	56	55	63	64	65
May	69	71	72	68	69	71	58	60	64	59	62	63	68	70	71
June	74	75	76	74	74	75	61	62	65	68	68	67	73	74	75
July	76	76	79	74	76	78	63	65	70	66	67	65	74	75	78
August	74	76	78	80	81	81	67	71	74	72	74	73	74	77	78
September	77	78	79	74	76	77	63	66	69	64	66	64	75	76	78
October	71	72	74	62	64	65	53	56	61	57	58	56	68	70	71
November	65	66	67	52	53	54	47	46	50	49	51	50	62	63	64
December	57	59	60	42	44	47	40	41	43	41	42	42	54	55	57



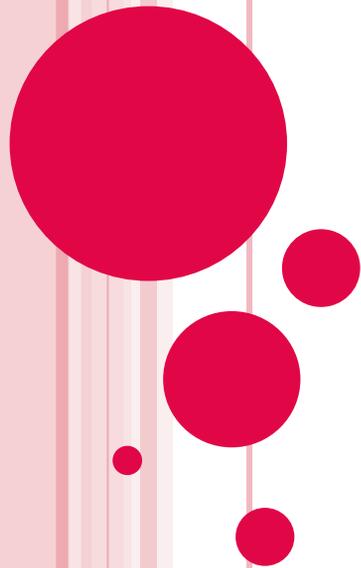
UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS - AVERAGES 2011-2015

Table 2a: UK and National: Bedroom Occupancy Trends 2011 - 2015

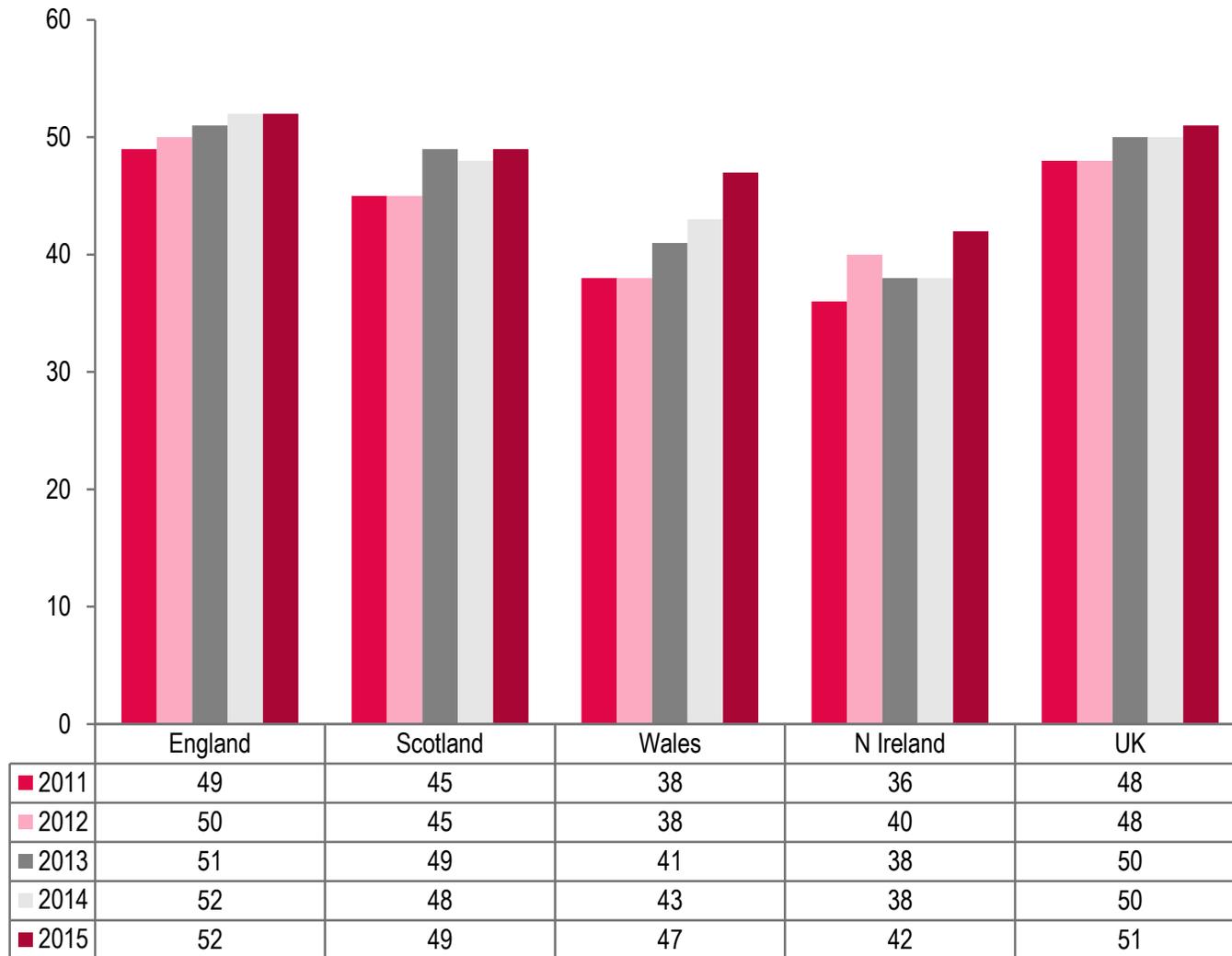
	England			Scotland			Wales			Northern Ireland			UK		
	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15
April–Oct Average	72	73	75	70	71	72	60	62	66	63	64	63	71	72	74
July–Sept Average	75	77	79	76	77	79	65	67	71	67	69	67	75	76	78
Annual Average	67	68	69	61	62	64	53	54	58	55	56	56	65	66	68



BEDSPACE OCCUPANCY: UK AND NATIONAL



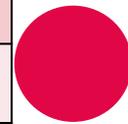
UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY 2011-2015



UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY 2011-2015

Table 3: UK and National: Bedspace Occupancy 2011 - 2015

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15
January	34	36	35	36	39	25	27	35	29	40	21	21	27	26	30	21	25	23	23	27	32	33	34	34	38
February	42	42	44	44	46	33	33	45	36	36	30	29	33	33	39	31	29	31	29	38	40	40	43	42	44
March	43	46	47	48	47	34	36	39	38	38	32	36	35	35	41	30	33	38	31	39	41	44	45	46	45
April	50	50	49	53	50	46	43	43	46	47	40	39	38	44	46	37	42	36	36	43	49	48	47	51	49
May	51	51	55	54	55	51	51	54	54	57	42	40	46	49	52	39	42	43	42	49	50	50	54	53	55
June	56	57	57	55	56	58	57	58	58	59	46	46	45	49	53	44	48	46	45	50	55	56	56	55	56
July	60	55	60	60	60	61	58	63	63	63	48	45	54	55	58	42	54	46	40	51	59	55	60	60	60
August	59	59	64	63	62	65	64	69	68	66	52	54	58	62	62	52	56	54	55	57	59	59	64	64	63
September	56	58	57	58	58	57	55	58	59	59	45	48	48	52	55	42	46	41	45	45	55	57	56	58	58
October	52	53	53	54	54	46	45	49	49	48	39	39	40	45	50	36	42	40	39	41	50	51	51	52	53
November	47	48	49	48	47	37	36	37	39	37	31	31	36	34	39	33	35	32	36	33	44	45	46	46	45
December	42	42	43	45	44	31	32	33	35	35	25	30	32	30	36	28	30	29	30	33	39	40	41	43	42



UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY TRENDS - AVERAGES 2011 - 2015

Table 3a: UK and National: Average Bedspace Occupancy 2011 - 2015

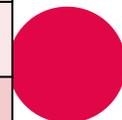
	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15	11	12	13	14	15
April–Oct Average	55	55	56	57	56	55	53	56	57	57	45	44	47	51	54	42	47	44	43	48	54	54	56	56	56
July–Sept Average	58	57	60	60	60	61	59	63	63	63	48	49	53	56	58	45	52	47	47	51	58	57	60	60	60
Annual Average	49	50	51	52	52	45	45	49	48	49	38	38	41	43	47	36	40	38	38	42	48	48	50	50	51



UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY TRENDS 2011-2015

Table 4: UK and National: Bedspace Occupancy Trends 2011 - 2015

	England			Scotland			Wales			Northern Ireland			UK		
	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15
January	35	50	37	26	44	35	21	37	28	22	37	25	33	48	36
February	42	59	45	33	54	39	29	45	35	30	46	33	40	57	43
March	45	63	47	35	52	38	35	49	37	31	47	36	43	60	45
April	50	66	51	44	58	45	39	53	43	37	56	38	48	64	49
May	51	71	55	51	69	55	41	60	49	39	62	45	50	70	54
June	57	75	56	57	74	58	46	62	49	45	68	47	56	74	56
July	57	76	60	59	76	63	46	65	56	48	67	46	56	75	60
August	59	76	63	64	81	68	53	71	61	53	74	55	59	77	63
September	57	78	58	56	76	59	47	66	52	44	66	44	56	76	57
October	53	72	54	45	64	49	39	56	45	35	58	40	51	70	52
November	48	66	48	36	53	38	31	46	36	32	51	34	45	63	46
December	42	59	44	32	44	34	28	41	33	28	42	31	40	55	42



UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY TRENDS - AVERAGES 2011 - 2015

Table 4: UK and National: Bedspace Occupancy Trends 2011 - 2015

	England			Scotland			Wales			Northern Ireland			UK		
	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15	11-13	12-14	13-15
April–Oct Average	55	56	57	55	55	57	45	47	51	44	45	45	55	55	55
July–Sept Average	58	59	60	61	62	63	50	53	56	48	49	48	58	59	58
Annual Average	50	51	51	46	47	48	39	41	44	38	39	39	49	49	49



UK AND NATIONAL ANNUAL WEEKDAY OCCUPANCY 2011 - 2015

Fig. 3: UK and National: Annual Weekday
Bedroom Occupancy 2011 – 2015

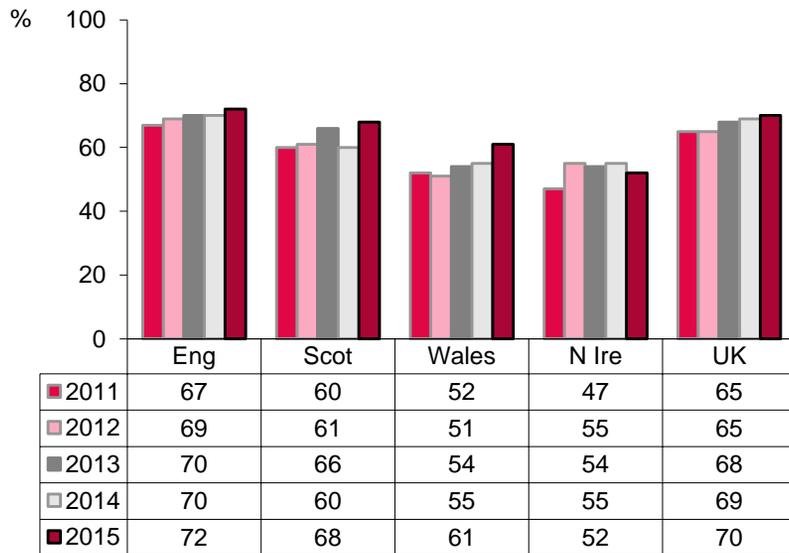
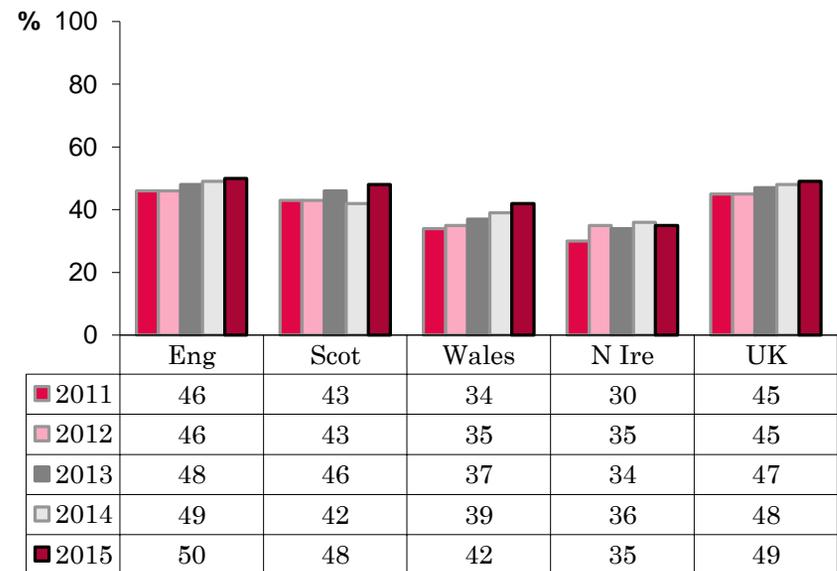
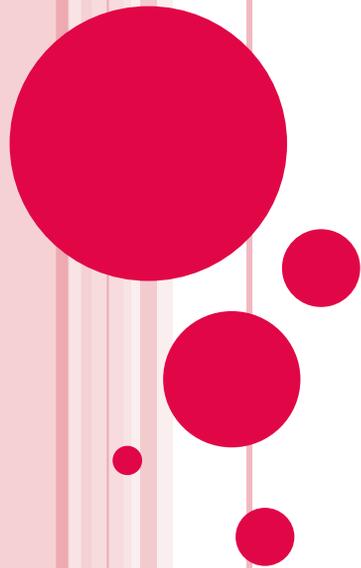


Fig. 4: UK and National: Annual Weekday
Bedspace Occupancy 2011 - 2015



OCCUPANCY IN DETAIL: UK AND NATIONAL



UK AND NATIONAL ANNUAL WEEKEND OCCUPANCY 2011 - 2015

Fig. 5 UK and National: Annual Weekend Bedroom Occupancy 2011 – 2015

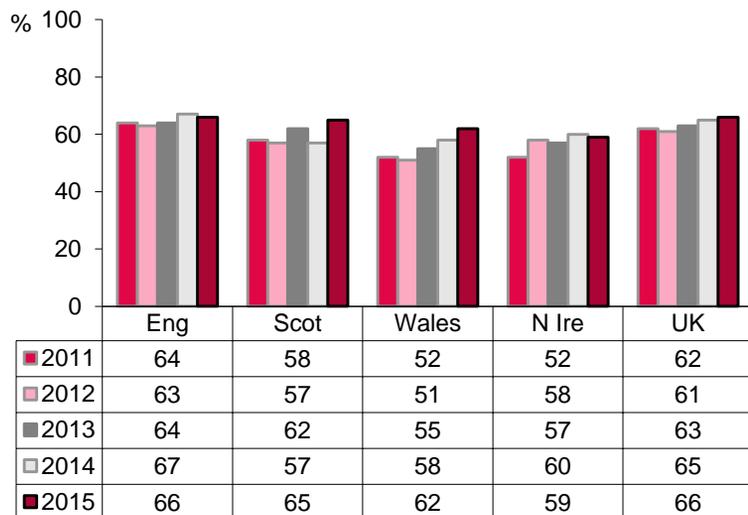
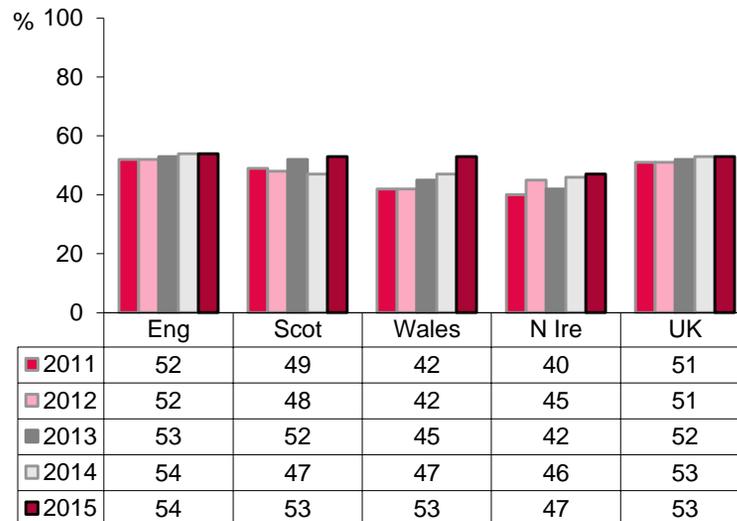
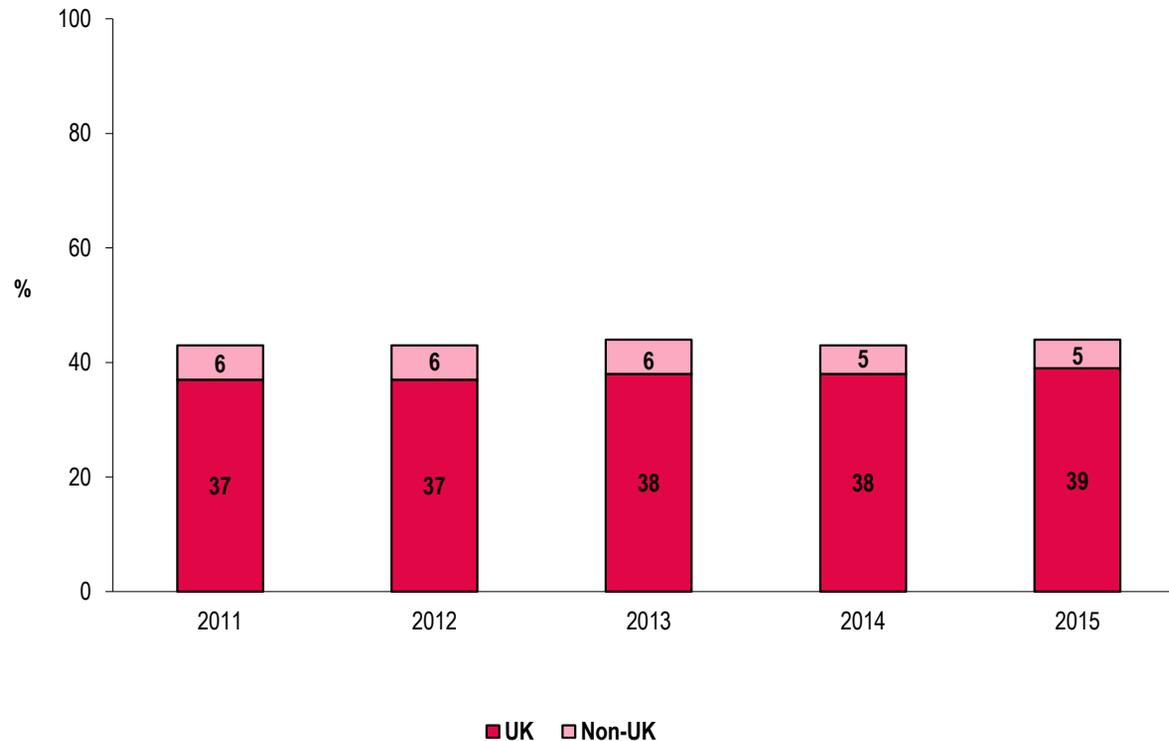


Fig. 6: UK and National: Annual Weekend Bedspace Occupancy 2011 – 2015



ORIGIN OF VISITORS

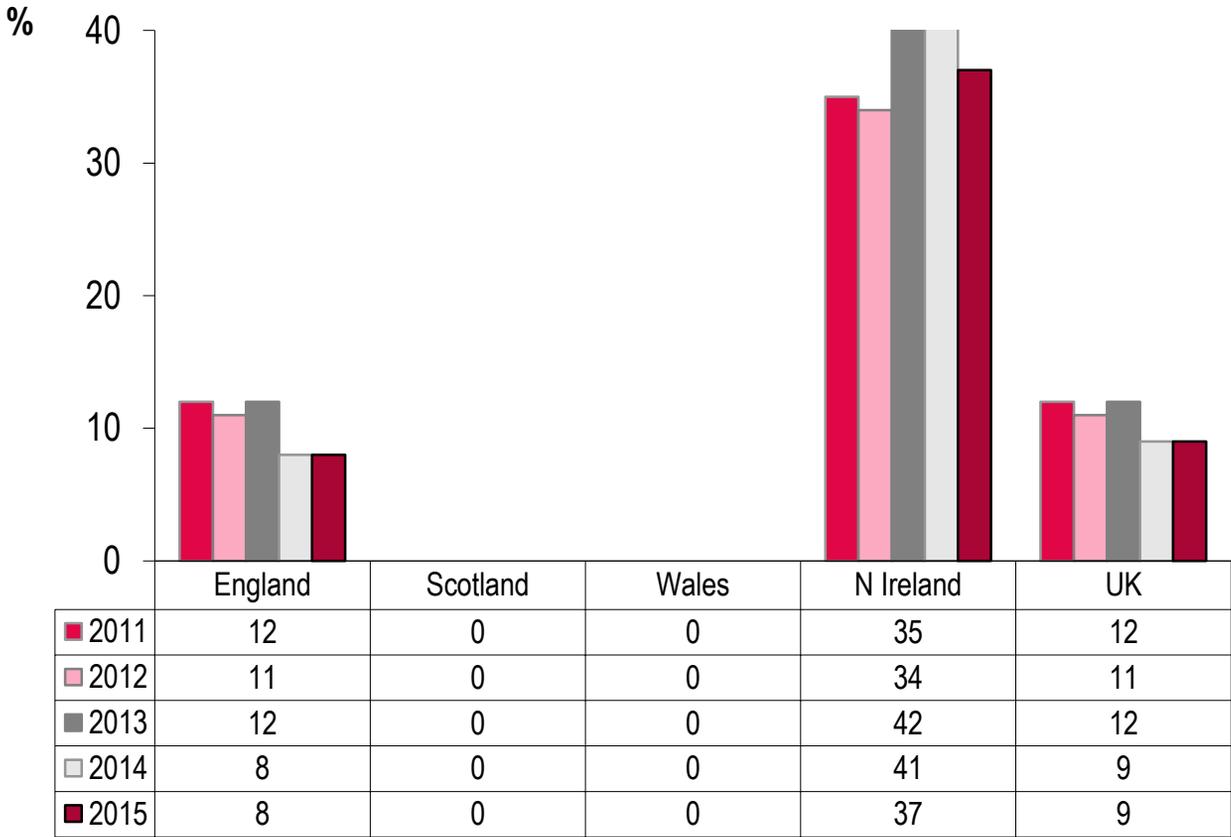
Fig. 7: UK: Annual Bedspace Occupancy 2011 - 2015 by Origin of Visitors



- Note that the occupancy figures in figure 7 and 8 are based on only those establishments able to differentiate between UK and non-UK visitors which is less than the total sample
- In addition the figures in figure 7 are calculated only on figures for England, Wales and Northern Ireland while those in figure 8 are calculated only on figures for England and Northern Ireland.



FIG 8: UK AND NATIONAL: ANNUAL NON-UK ARRIVALS AS A PERCENTAGE OF ALL ARRIVALS 2011-2015



➤ Due to changes in the data collection, it is no longer possible to provide UK/non UK figures for Scotland or figures relating to arrivals for Wales



UK ANNUAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 9: UK: Annual Bedroom Occupancy 2011 - 2015 by Type of Establishment

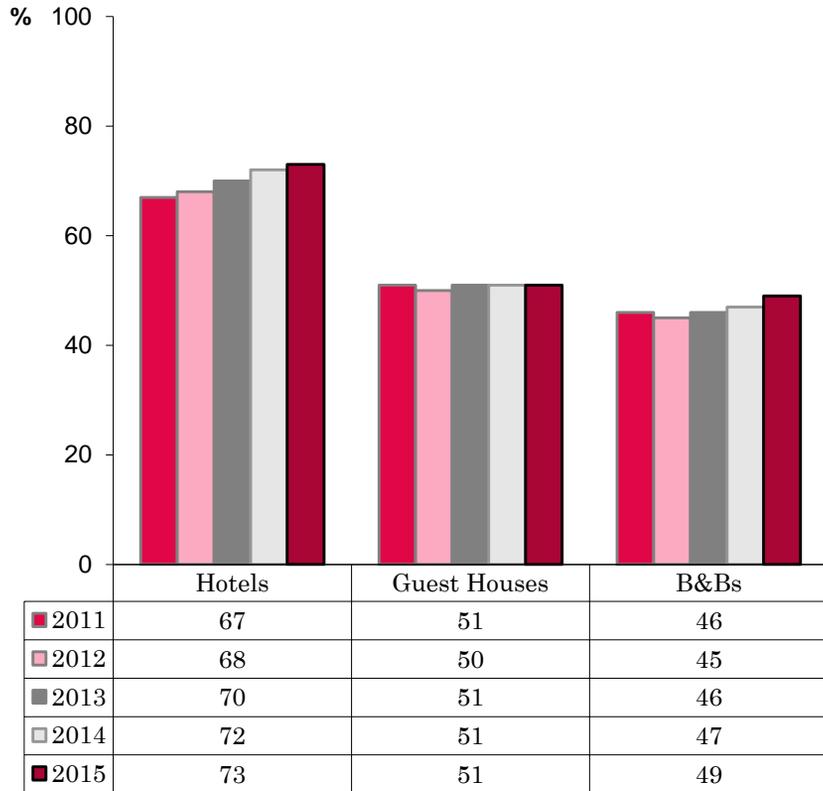
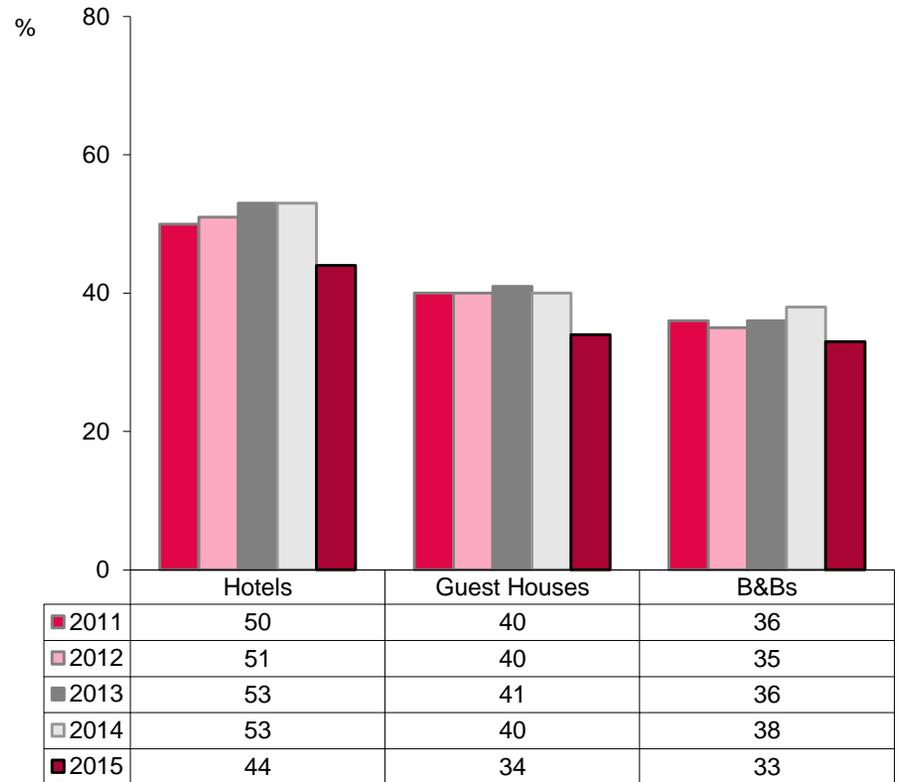


Fig. 10: UK: Annual Bedspace Occupancy 2011 - 2015 by Type of Establishment



NATIONAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 11: National: Annual Bedroom Occupancy 2014 and 2015 by Type of Establishment

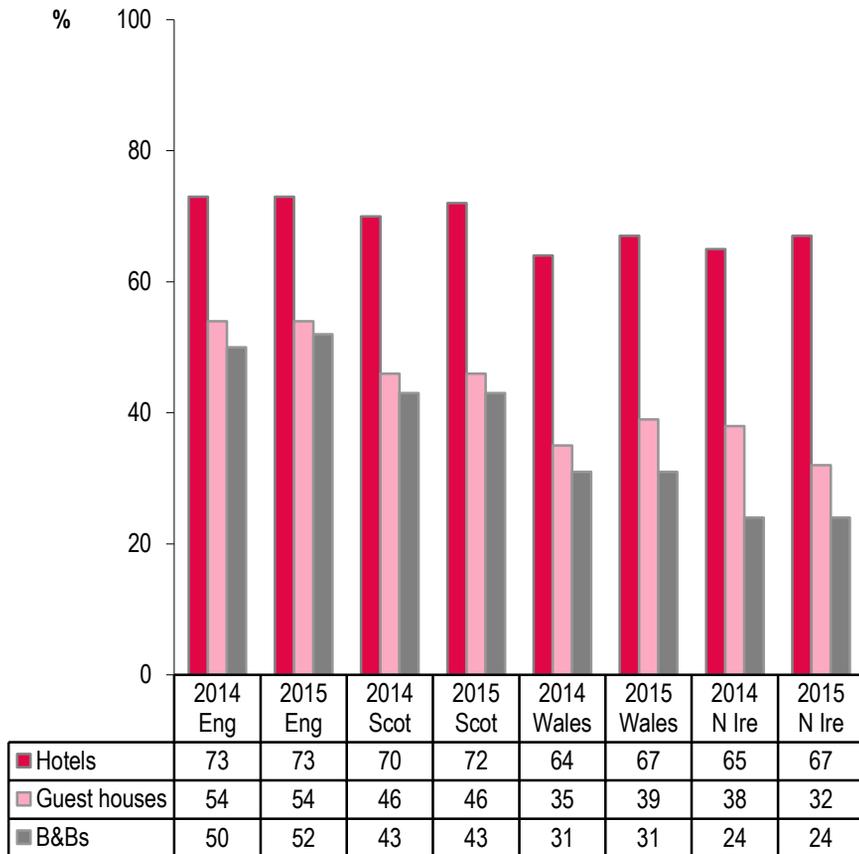
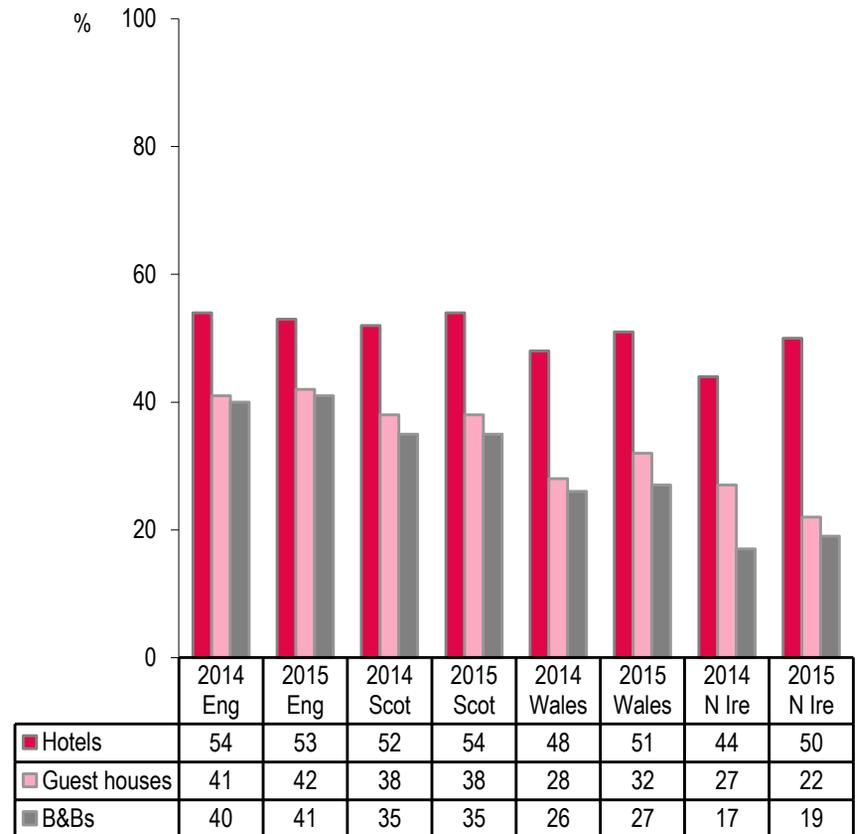


Fig. 12: National: Annual Bedspace Occupancy 2014 and 2015 by Type of Establishment



UK OCCUPANCY BY LOCATION OF ESTABLISHMENT

Fig. 13: UK: Annual Bedroom Occupancy 2011 - 2015 by Location of Establishment

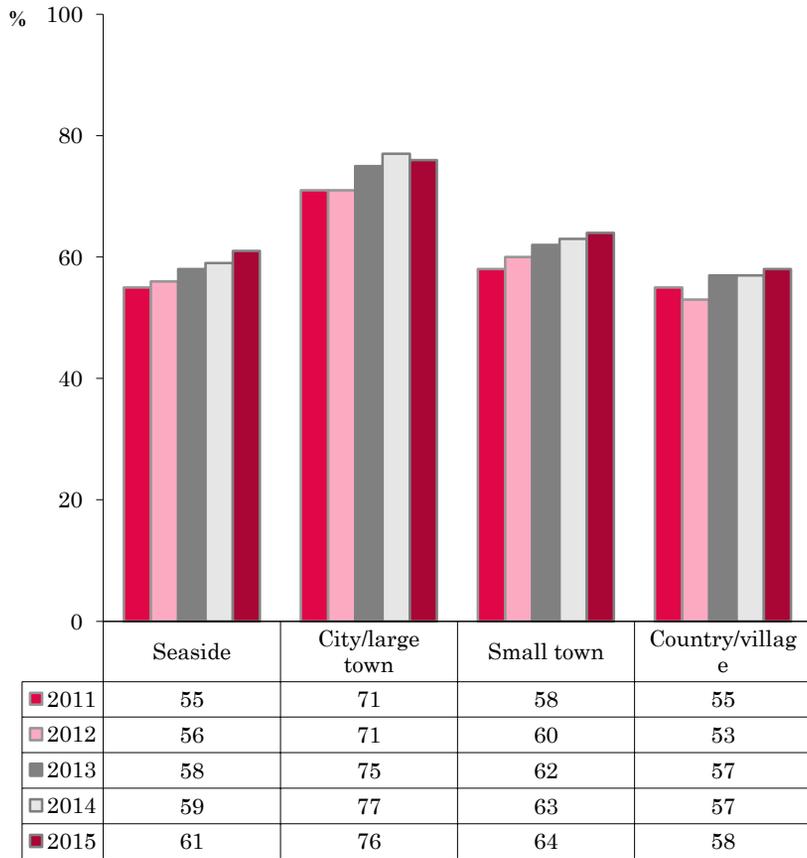
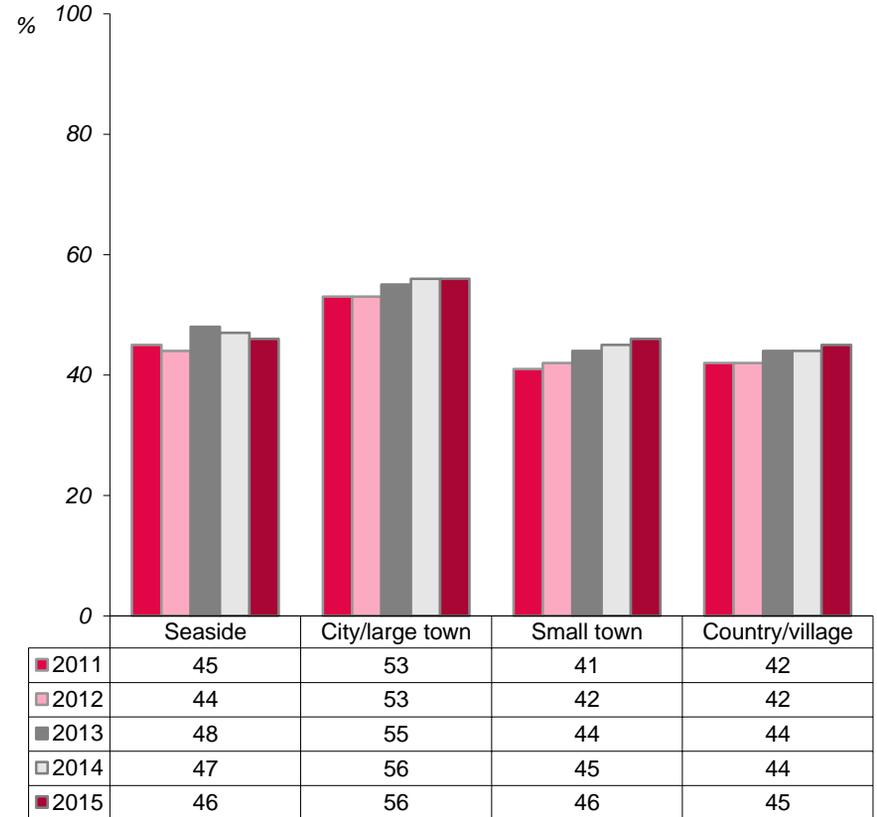
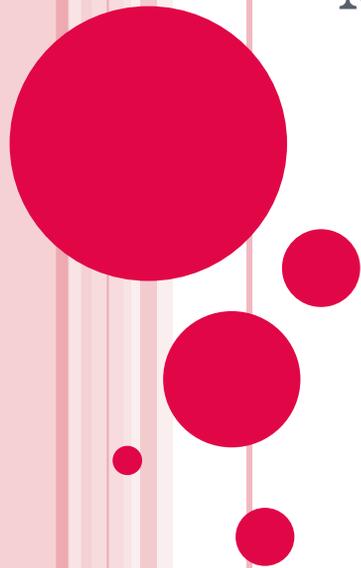


Fig. 14: UK: Annual Bedspace Occupancy 2011 - 2015 by Location of Establishment



BACKGROUND AND METHODOLOGY



BACKGROUND TO THE SURVEY

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) 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 June 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)



BACKGROUND TO THE SURVEY (CONT'D)

- This document summarises the main trends from the surveys carried out in England, Scotland, Wales and Northern Ireland which have been aggregated to provide occupancy figures for the UK as a whole.
- The individual surveys are conducted according to a common specification to ensure the production of comparable data for the whole of the UK.
- The survey includes hotels (including motels, lodges and inns), guesthouses and private houses offering bed and breakfast to tourists (including farmhouses). It should be noted that only in Northern Ireland, where compulsory registration of tourist accommodation ensures an accurate stock record, is there a definition of the various types of accommodation. In England, Scotland and Wales the type is defined by each accommodation establishment itself in answering a questionnaire and therefore, because the criteria are not objectively defined, the distinction between types is not always clear and may vary slightly.

In 2015 there were about 47,000 establishments of this type in the UK which were known to the tourist boards, with a total of just over 1.8 million bedspaces available daily.



METHODOLOGICAL DETAILS

Figure 15: Distribution of total known accommodation stock 2015: Number of establishments

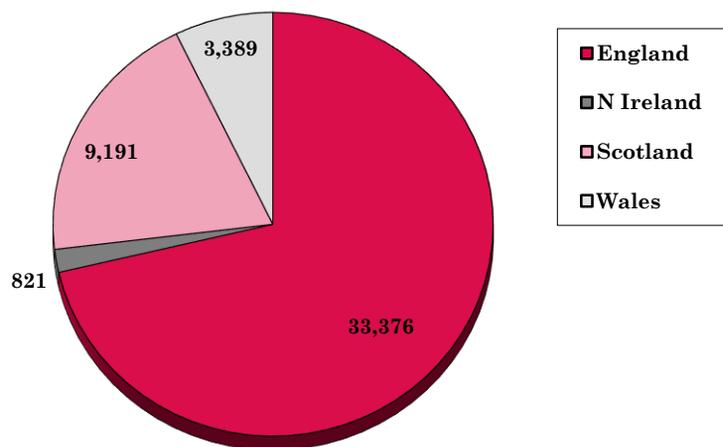
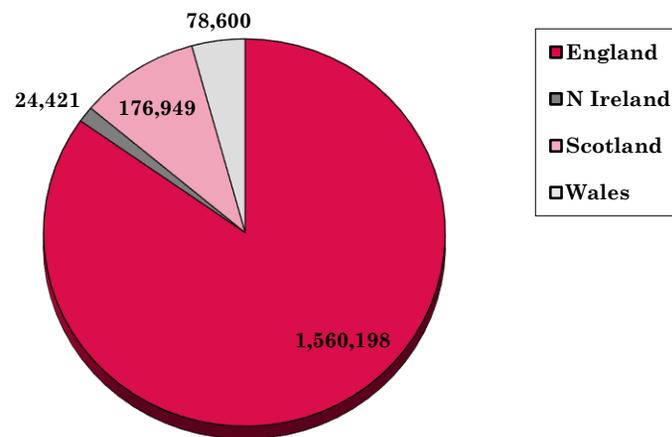


Figure 16: Distribution of total known accommodation stock 2015: Number of bedspaces



- Each month between 2,387 and 2,5382 returned data and the occupancy rates in the report are calculated from these monthly samples.
- The occupancy figures in this summary are calculated on the accommodation available each month - i.e. only open accommodation is included. In calculating figures for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area that month.



METHODOLOGICAL DETAILS (CONT'D)

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 2015 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 will 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.

