



UNITED KINGDOM OCCUPANCY SURVEY

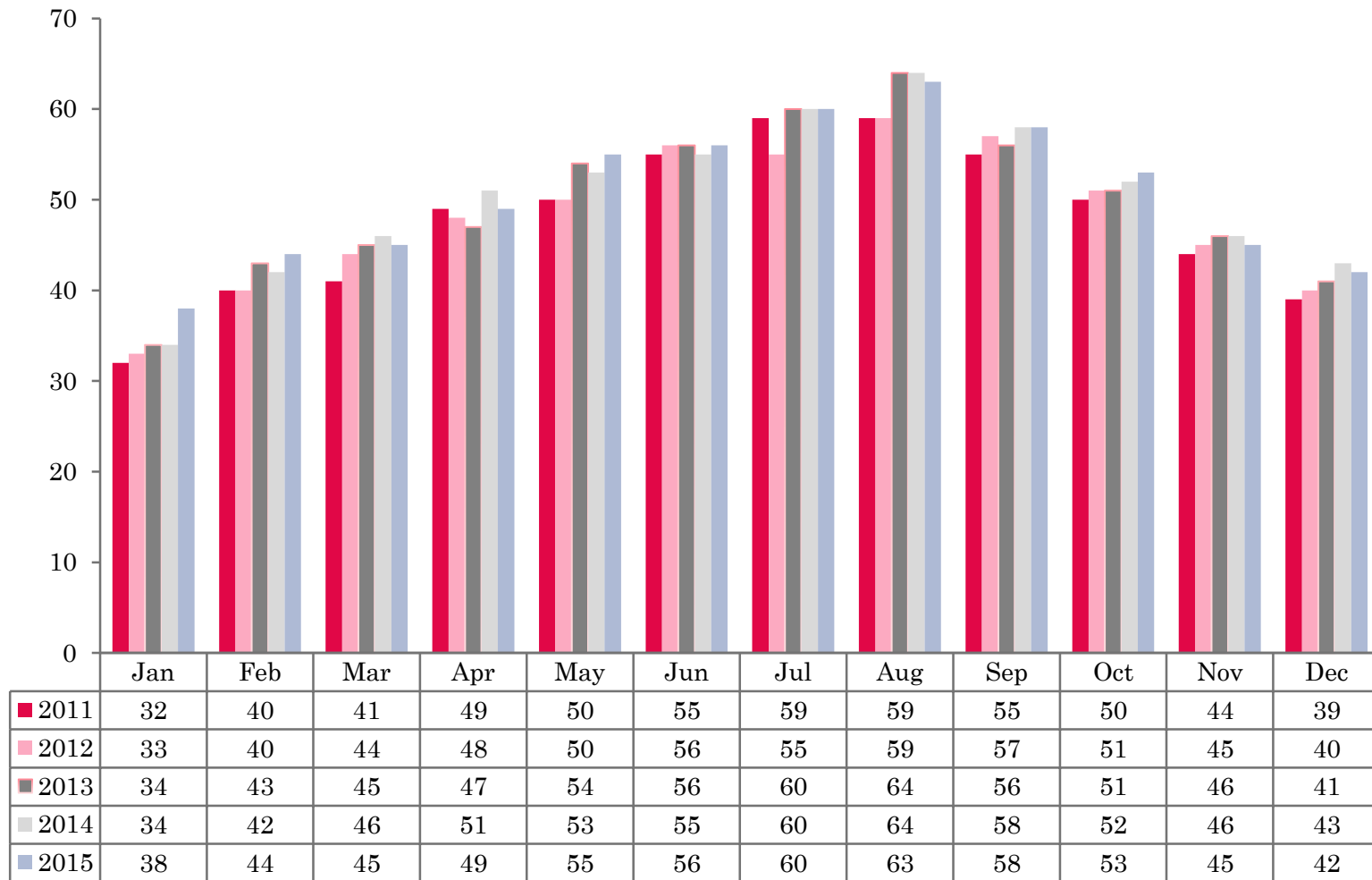
Serviced Accommodation Summary Report
December 2015

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 2011 - 2015



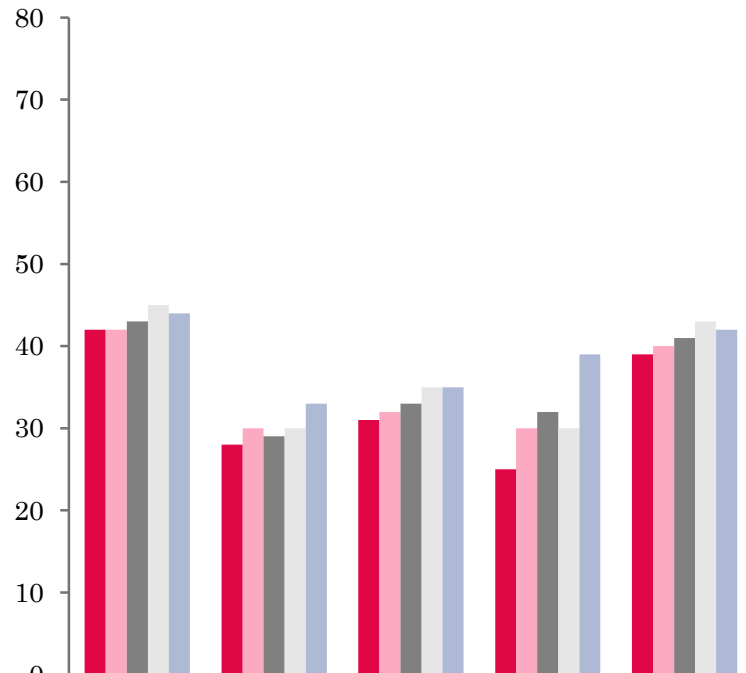
UK BEDROOM OCCUPANCY 2011 - 2015



- ❖ 2,387 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).
- ❖ Both UK bedspace (42%) and UK room (58%) occupancy levels had remained flat when compared to the same period the previous year.

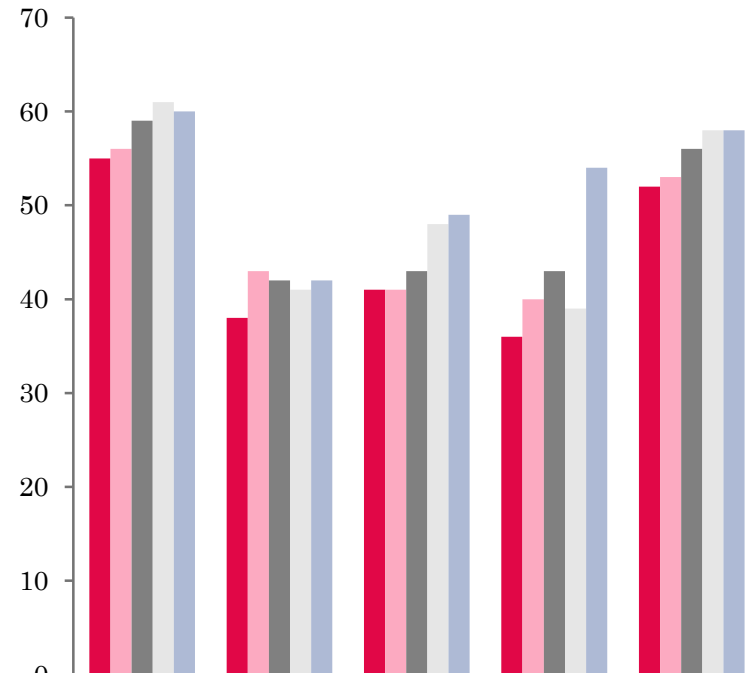


NATIONAL BEDSPACE OCCUPANCY DECEMBER 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	42	28	31	25	39
2012	42	30	32	30	40
2013	43	29	33	32	41
2014	45	30	35	30	43
2015	44	33	35	39	42

NATIONAL ROOM OCCUPANCY DECEMBER 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	55	38	41	36	52
2012	56	43	41	40	53
2013	59	42	43	43	56
2014	61	41	48	39	58
2015	60	42	49	54	58



- During December 2015 both UK bedspace occupancy and room occupancy remained flat when compared with the same month in 2014.
- England occupancy levels mirrored that of the UK, with bedspace and room occupancy levels remaining flat at 44% and 60% (-1% respectively), when compared with December 2014.
- Bedspace occupancy levels in Northern Ireland during December 2015, had increased by 3% when compared to December 2014. Room occupancy had remained flat (+1%) when compared to the same period in 2014.
- Wales increased significantly in both bedspace and room occupancy levels increased during December when compared to the same period in 2014. A 9% rise was found in bed occupancy, up from 30% to 39%. Room occupancy was up 15%, from 39% in December 2014 to 54% this year.
- Both room and bedspace occupancy levels across Scotland remained flat during 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. Wales remained on a par with December 2014, whilst Northern Ireland increased by 4% when compared to December 2014 (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 2013 - 2015

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	43	45	44	59	61	60	1905	1818	1799
Northern Ireland	29	30	33	42	41	42	163	158	151
Scotland	33	35	35	43	48	49	268	250	241
Wales	32	30	39	43	39	54	106	98	196
UK	41	43	42	56	58	58	2442	2324	2387

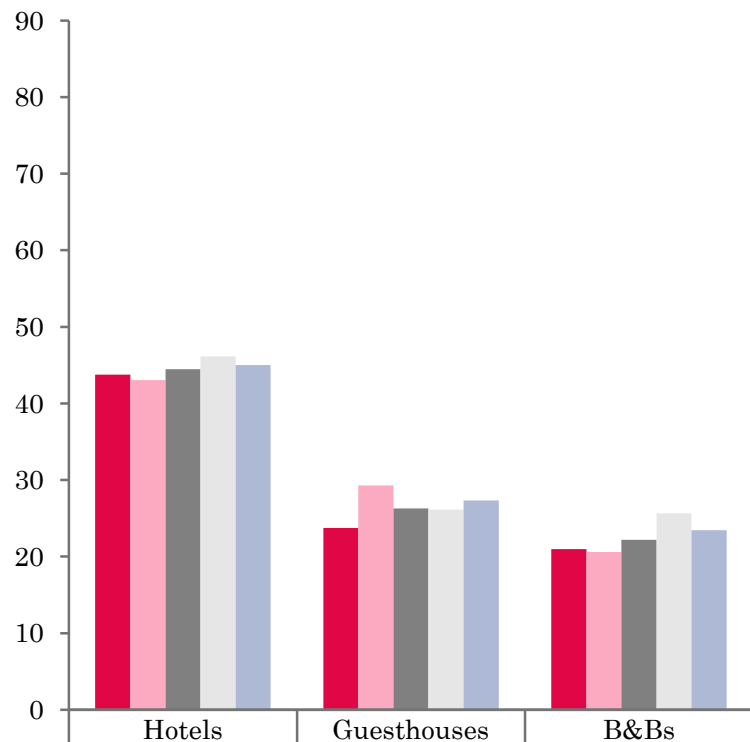
Table 2: UK/Non UK Occupancy Levels December 2013 – 2015 (see note 5a and 5b Slide 19)

	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	28	31	29	5	3	2	10	5	5	15	8	8	1905	1818	1799
Northern Ireland	15	18	17	14	12	16	48	35	35	49	41	50	163	158	151
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	268	250	241
Wales	30	29	30	2	1	1	**	**	**	6	4	4	106	98	196
UK	28	31	29	5	3	2	11	6	6	15	9	9	2442	2324	2387

** FIGURES NOT AVAILABLE

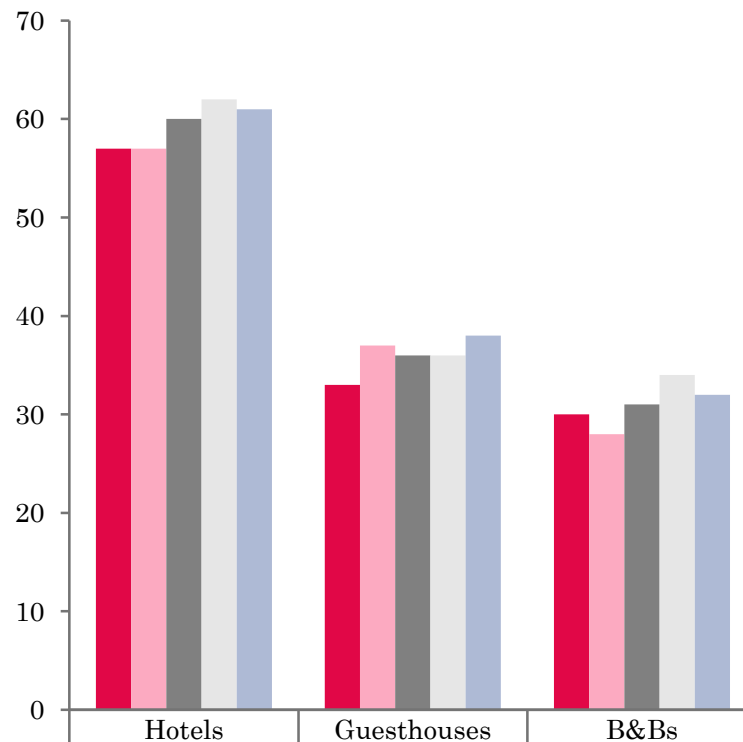


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2011-2015



	Hotels	Guesthouses	B&Bs
2011	44	24	21
2012	43	29	21
2013	44	26	22
2014	46	26	26
2015	45	27	23

UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2011-2015



	Hotels	Guesthouses	B&Bs
2011	57	33	30
2012	57	37	28
2013	60	36	31
2014	62	36	34
2015	61	38	32



- Both bed and room occupancy levels in the hotel sector remained flat during December 2015. Guesthouses witnessed an increase in room occupancy, up by 2% when compared to December 2014, with bed occupancy remaining flat. B&B's room and bed occupancy levels fell by 2% and 3% respectively.
- At the UK level, bed occupancy levels in four out of the six size bands had remained flat when compared to the same month in 2014. A decrease in bed occupancy levels was found in the 11-25 and 51-100 size bandings, where occupancy was down by 4% and 5% respectively when compared to December 2014. Room occupancy mirrored that of bedspace occupancy with four out of the six size bandings remaining on a par with December 2014. Both the 4-10 and 11-25 size bandings increased by 3% and 2% respectively when compared to the same period in 2014.
- Seaside locations witnessed a fall of 4% in bedspace occupancy when compared with the same month in 2014. City/Large Town and Small Town locations bedspace occupancy remained fairly flat (-1%) whilst Countryside/village locations remained at the same level in 2013 and 2014 (33%). In contrast, Seaside locations saw an increase in room occupancy during this month, (up by 2%) when compared to the same period in 2014. The other 3 locations remained flat during December 2015, City/Large town (-1%) and small town and Countryside/Village locations (+1%)
- Across all tariff bands, bedspace occupancy had decreased or remained on a par during December 2015. The £20.00-£29.99 witnessed the biggest fall, down by 4% on the same period in 2014. The £40.00-£49.99 and the £50.00-£59.99 tariff bands fell by 3% and 2% respectively when compared with December 2014. Both the £30.00-£39.99 and >£60.00 bandings remained on a par with the same month in 2014. Room occupancy levels in the £20.00-£29.99 tariff band was down by 8% and the £30.00-£39.99 down also witnessed a decrease of 4%. The three remaining tariff bands all remained on a par when compared with the same month in 2014.



Table 3: Occupancy Levels by Type of Establishment: December 2013 – 2015

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	46	48	46	62	65	63	1466	1440	1457
Northern Ireland	35	37	40	50	49	51	72	75	75
Scotland	40	41	42	52	54	56	205	200	200
Wales	37	36	40	51	45	53	58	60	161
UK	44	46	45	60	62	61	1801	1775	1893
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	29	29	30	40	40	41	170	148	131
Northern Ireland	18	19	15	28	24	17	16	18	15
Scotland	16	16	18	19	23	32	29	20	15
Wales	16	13	17	21	19	24	21	17	15
UK	26	26	27	36	36	38	236	203	176
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	25	29	27	35	37	37	269	230	211
Northern Ireland	7	7	9	13	11	13	73	65	57
Scotland	11	16	11	15	26	16	34	30	26
Wales	16	9	9	19	12	11	27	21	13
UK	22	26	23	31	34	32	403	346	307



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: December 2013 – 2015 (see notes 5a & 5b Slide 19)

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	45	49	47	42	42	41	55	60	59	60	62	61
Northern Ireland	35	42	35	25	28	26	45	50	44	40	41	37
Scotland	36	39	39	31	34	35	42	47	49	44	49	51
Wales	32	34	41	31	26	33	43	40	49	42	37	47
UK	43	47	45	39	40	39	52	57	57	56	58	58



Table 35: Non-UK Percentages: December 2013 – 2015 (see notes 5a & 5b Slide 19)

	Percentage of Non-UK Guests %						4Percentage of Non-UK Bednights 3%					
	Weekend			Weekday			Weekend			Weekday		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	10	4	3	11	6	6	15	6	6	16	9	9
Northern Ireland	32	31	31	38	35	35	40	38	36	43	42	39
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	3	3	6	4	3
UK	11	5	4	12	7	7	15	7	7	16	10	9

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: December 2013 - 2015

A: Percentage of Bedspace Occupancy												
	1 - 3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	19	21	22	142	25	26	26	193	35	38	33	86
Northern Ireland	6	8	6	44	11	9	12	22	18	22	22	27
Scotland	10	12	7	17	20	25	24	35	30	36	32	37
Wales	14	11	8	15	19	17	23	20	30	37	37	20
UK	17	19	19	218	24	25	25	270	34	37	33	170

Table6: Occupancy Levels by Size: December 2013 - 2015

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	44	44	44	47	45	45	38	29	48	51	50	1302
Northern Ireland	24	34	34	21	37	39	36	23	42	38	48	14
Scotland	34	34	36	49	47	43	46	42	48	49	49	61
Wales	33	37	35	16	37	45	49	9	****	35	46	109
UK	42	42	42	133	45	45	40	103	48	50	50	1486



Table 7: Occupancy Levels by Size: December 2013 – 2015

B:Percentage of Bedroom Occupancy												
	1 -3 Rooms				4 – 10 Rooms				11 – 25 Rooms			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	25	29	30	142	34	36	39	193	51	52	50	86
Northern Ireland	11	13	9	44	19	12	16	22	28	31	31	27
Scotland	14	22	11	17	24	32	34	35	37	43	42	37
Wales	17	14	9	15	24	22	31	20	40	46	45	20
UK	23	27	26	375	32	34	37	270	48	50	48	170

Table 7: Occupancy Levels by Size: December 2013 - 2015

B (cont): Percentage of Bedroom Occupancy												
	26 – 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	58	58	57	47	56	57	54	29	68	71	69	1302
Northern Ireland	39	43	39	21	50	50	48	23	58	53	59	14
Scotland	47	46	50	49	61	55	62	42	63	68	66	61
Wales	44	48	46	16	50	49	54	9	****	48	65	109
UK	55	55	55	133	56	56	55	103	67	69	68	1486



Table 8: Occupancy Levels by Location Type: December 2013 - 2015

A: Percentage Bedspace Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	31	39	34	155	52	53	51	1012	37	39	39	360	36	35	35	272
Northern Ireland	19	22	20	30	38	38	43	60	19	20	21	39	9	13	12	22
Scotland	24	29	28	23	46	47	48	119	20	21	20	48	22	27	27	51
Wales	33	34	36	25	44	45	46	8	24	30	30	12	24	24	25	38
UK	30	37	33	233	50	51	50	1199	34	36	35	459	33	33	33	383

Table 8: Occupancy Levels by Location Type: December 2013 - 2015

B:Percentage Bedroom Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	46	47	49	155	69	72	70	1012	54	56	56	360	48	46	48	272
Northern Ireland	25	29	26	30	53	51	53	60	27	26	26	39	16	20	18	22
Scotland	31	37	38	23	61	64	63	119	31	33	36	48	27	38	37	51
Wales	41	41	44	25	64	50	51	8	35	38	41	12	30	33	34	38
UK	43	45	47	233	67	69	68	1199	49	51	52	459	43	44	45	383

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 2013 – 2015
(see note 5a Slide 19)

A: Percentage of Bedspace Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	**	**	**	**	21	26	22	20	16	15	15	67
Northern Ireland	**	**	**	**	10	7	10	14	6	11	9	37
Scotland	**	**	**	**	12	30	19	4	12	11	8	20
Wales	**	**	**	**	4	3	11	4	18	16	17	12
UK	**	**	**	**	19	25	21	42	15	14	14	136

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 2013 – 2015 (see note 5a Slide 19)

B: Percentage of Bedspace Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	26	27	23	101	36	35	34	69	46	47	46	233
Northern Ireland	19	27	24	30	40	38	23	13	32	35	42	57
Scotland	21	24	20	29	36	37	32	22	41	44	45	165
Wales	22	20	25	15	24	38	34	16	40	36	43	142
UK	25	26	23	175	35	35	33	120	45	46	46	597

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 2013 – 2015 (see note 5a Slide 19)

A: Percentage of Bedroom Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	**	**	**	**	37	39	30	20	25	28	23	67
Northern Ireland	**	**	**	**	14	7	11	14	9	16	12	37
Scotland	**	**	**	**	15	45	27	4	19	18	15	20
Wales	**	**	**	**	7	6	18	4	24	23	24	12
UK	**	**	**	**	32	37	29	42	24	26	22	136

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 2013 – 2015 (see note 5a Slide 19)

B: Percentage of Bedroom Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	33	36	36	101	46	44	46	69	62	65	63	233
Northern Ireland	27	37	32	30	54	54	33	13	48	46	53	57
Scotland	32	36	32	29	49	54	47	22	53	57	59	165
Wales	31	34	39	15	30	47	41	16	54	46	56	142
UK	33	36	36	175	46	46	46	120	60	62	62	597

** 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 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 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 2015) 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)

