



# UNITED KINGDOM OCCUPANCY SURVEY

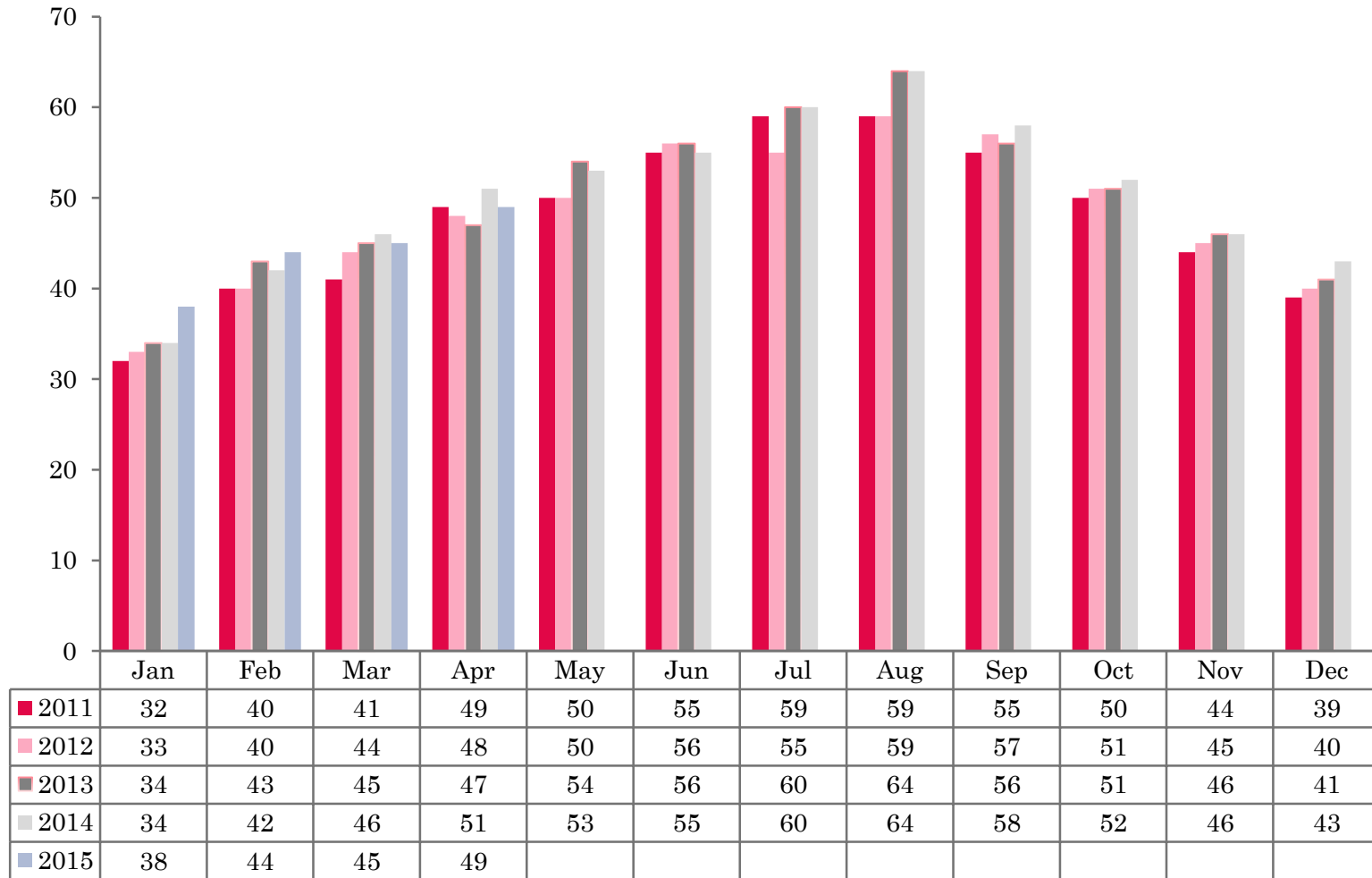
Serviced Accommodation Summary Report  
April 2015

# UK OCCUPANCY SURVEY

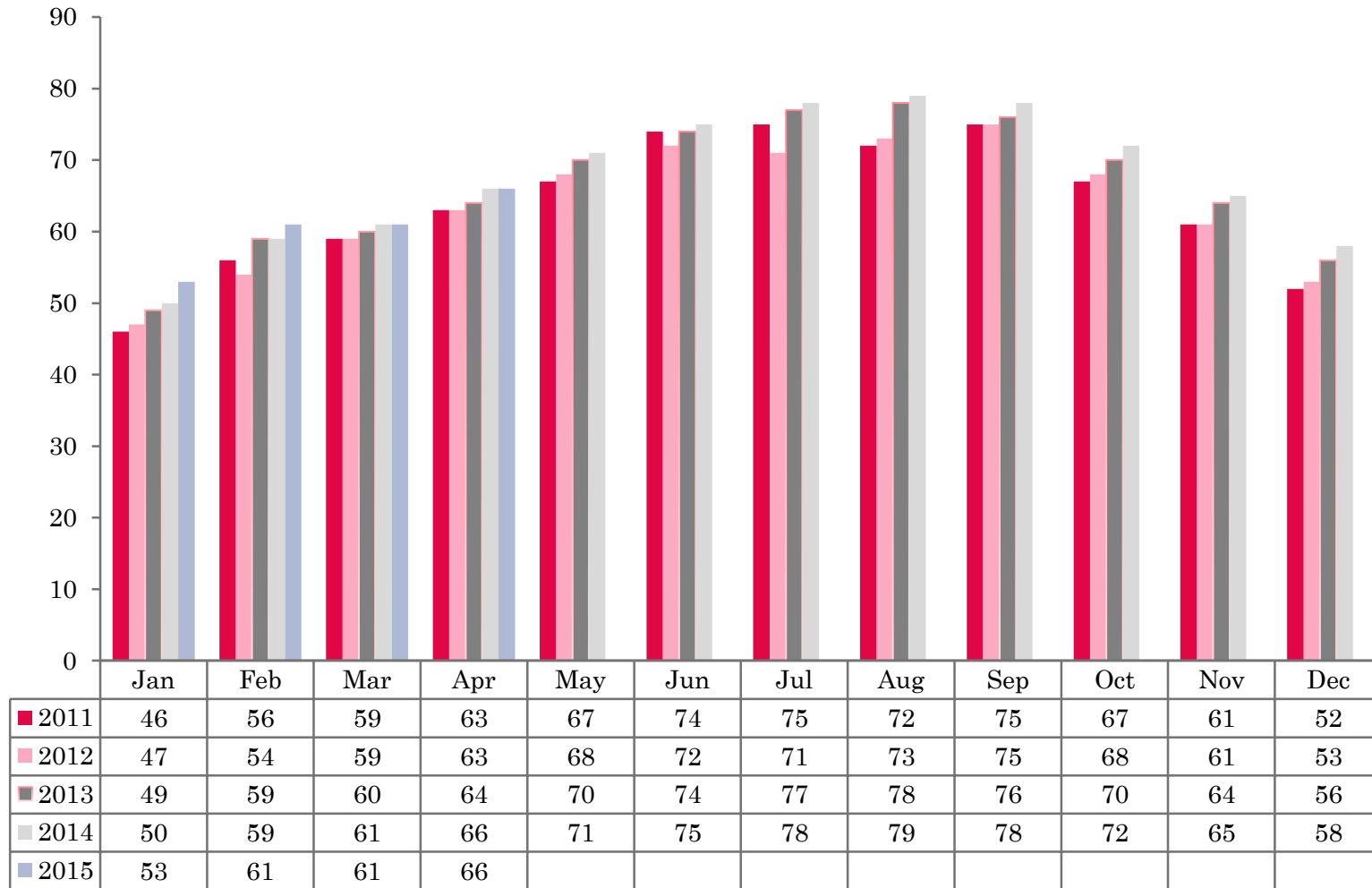
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2011 - 2015



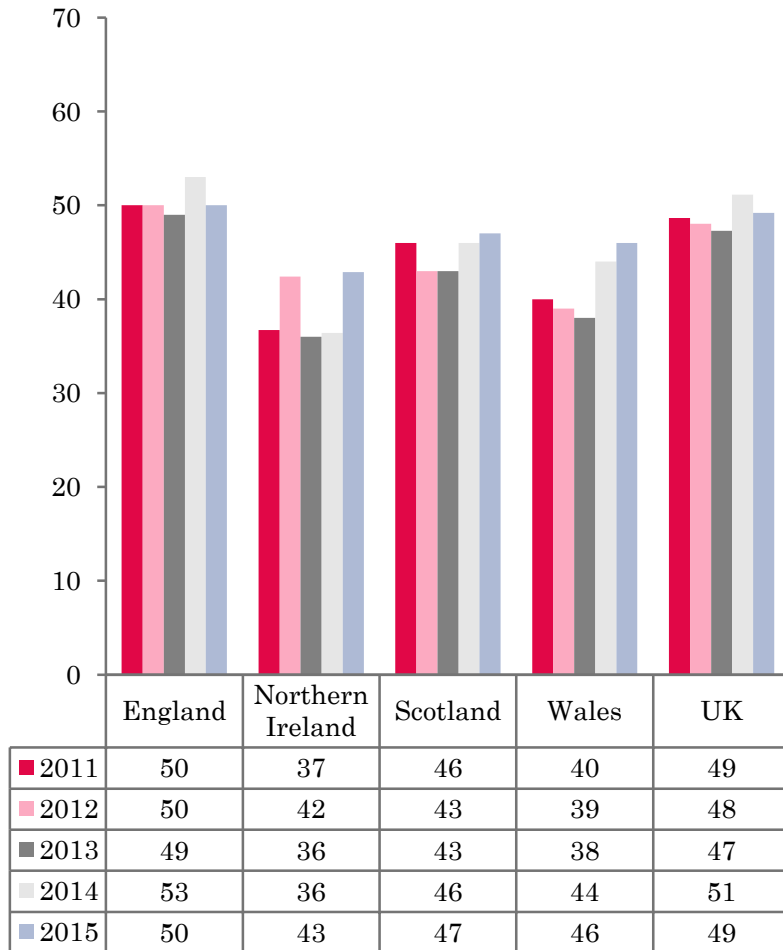
# UK BEDROOM OCCUPANCY 2011 - 2015



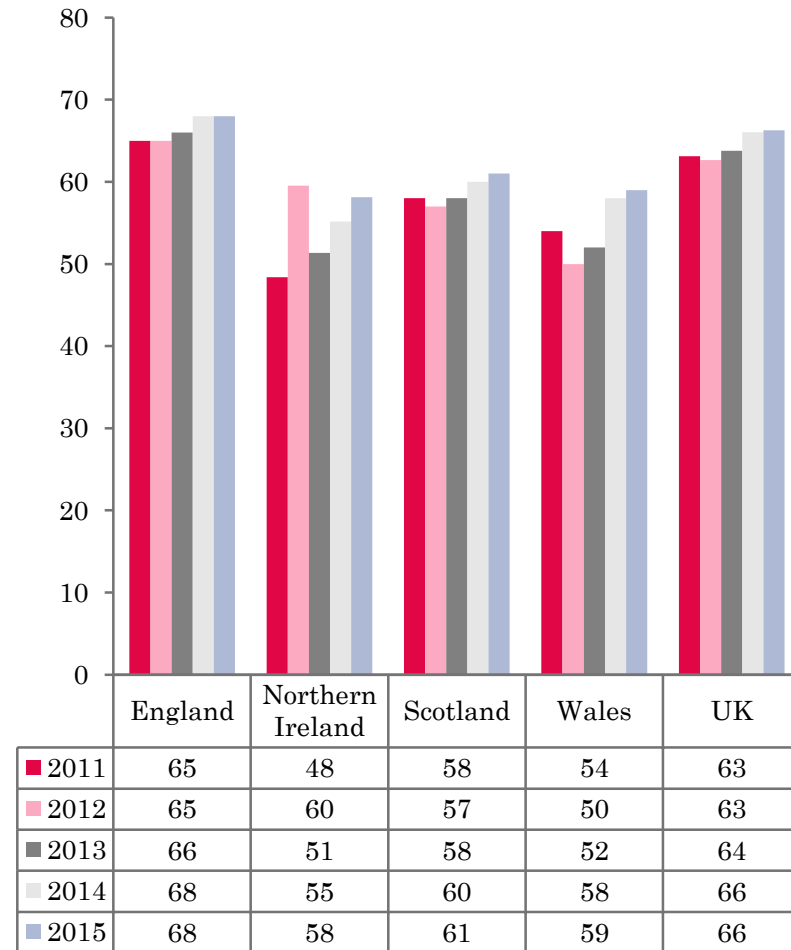
- ❖ 2,582 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (49%) had fallen slightly when compared to April 2014. Room occupancy remained at the same level as the previous year (66%).



## NATIONAL BEDSPACE OCCUPANCY APRIL 2011-2015



## NATIONAL ROOM OCCUPANCY APRIL 2011-2015



- During April 2015 UK bedspace occupancy had fallen by 2%, with room occupancy remaining static when compared with the same month in 2014.
- England was similar to the UK, with bedspace occupancy down (-3%) and room occupancy remaining flat when compared with April 2014.
- Room occupancy in Northern Ireland increased by 3% in April 2015 when compared to the same period last year. Bedspace occupancy was also up by a healthy margin, with an increase of 7% on April 2014.
- Wales witnessed an increase in bedspace occupancy levels during April, up by 2%, with bedroom occupancy levels remaining flat when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland remained flat during April 2015.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained static when compared with the previous year. Northern Ireland saw an increase of 6% on April 2014 whilst England remained on a par with the same period in 2014. Wales fell by 2%. (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: April 2013 - 2015**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	49	53	50	66	68	68	1542	1937	1882
Northern Ireland	36	36	43	51	55	58	162	168	197
Scotland	43	46	47	58	60	61	320	297	292
Wales	38	44	46	52	58	59	129	116	211
<b>UK</b>	47	51	49	64	66	66	2153	2518	2582

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

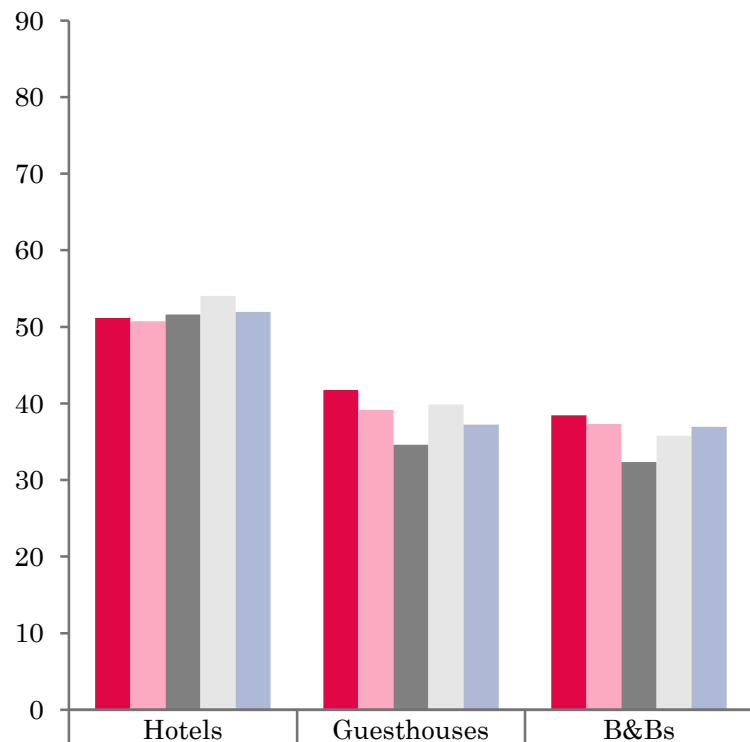
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	36	37	40	5	4	3	10	8	7	12	10	8	1542	1937	1882
Northern Ireland	19	19	19	17	18	24	41	43	37	48	49	56	162	168	197
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	320	297	292
Wales	33	37	39	3	4	2	**	**	**	7	9	4	129	116	211
<b>UK</b>	35	37	39	5	4	3	11	9	8	13	11	9	2153	2518	2582

\*\* FIGURES NOT AVAILABLE



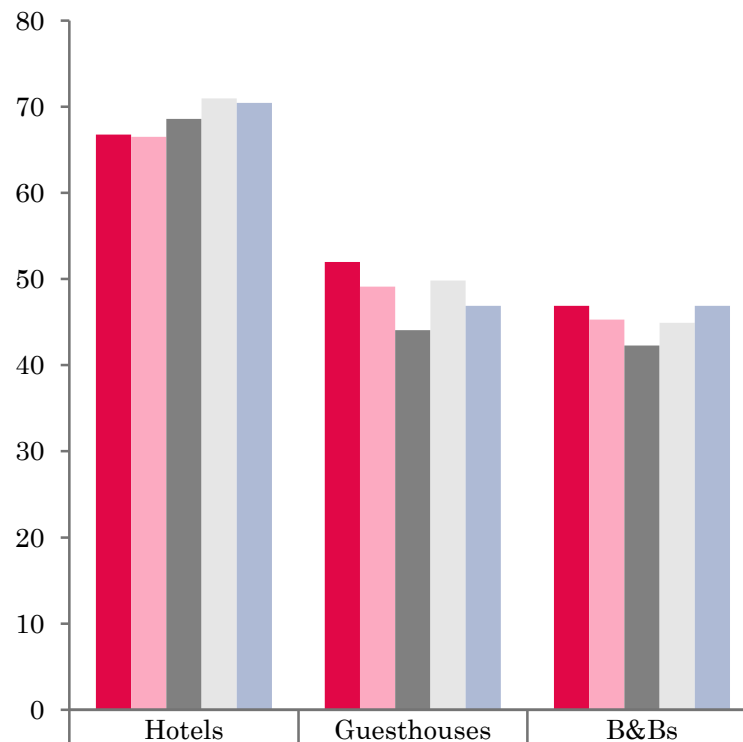


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2011-2015



	Hotels	Guesthouses	B&Bs
2011	51	42	38
2012	51	39	37
2013	52	35	32
2014	54	40	36
2015	52	37	37

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2011-2015



	Hotels	Guesthouses	B&Bs
2011	67	52	47
2012	67	49	45
2013	69	44	42
2014	71	50	45
2015	70	47	47



- Bedspace occupancy in both the Hotels and Guesthouses sector fell slightly during April 2015. B&B's remained static in bed occupancy but increased by 2% in room occupancy when compared to April 2014. Guesthouses witnessed a 3% drop in room occupancy levels, with hotels remaining static.
- Occupancy levels in all but one of the size bands had either decreased or had remained static in bedspace occupancy when compared to April 2014. The only increase was found in the 4-10 size banding where levels rose by 2%. Room occupancy levels in the 1-3 and 4-10 size banding increased by 2% on 2014 data, with the 51-100 size banding up 3% on last year results. Room occupancy levels in the 11-25 and 26-50 size banding fell by 4% respectively.
- All locations either witnessed a fall in bedspace occupancy or remained static during April 2015. Both City/large town and small town locations witnessed a decrease of 3% compared to 2014. Only seaside locations saw an increase in room occupancy during April 2015, up by 3% on 2014 data. All other locations recorded a drop in room occupancy levels.
- With the exception of the £50.00-£59.99 tariff band, all other bandings either witnessed a decrease or remained static in both room and bedspace occupancy levels during April. The largest decrease in bed occupancy was found in the £30.00-£39.99 tariff band, where occupancy levels were down 4% on 2014 data. The £50.00-£59.99 tariff band was the only increase in room occupancy, where levels had increased by 4% when compared to April 2014.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	53	55	52	70	72	71	976	1471	1465
Northern Ireland	42	46	53	60	66	70	56	71	80
Scotland	48	52	52	65	68	69	220	209	210
Wales	45	49	51	61	66	66	64	65	167
<b>UK</b>	<b>52</b>	<b>54</b>	<b>52</b>	<b>69</b>	<b>71</b>	<b>70</b>	<b>1316</b>	<b>1816</b>	<b>1922</b>
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	36	42	39	46	53	50	221	184	165
Northern Ireland	32	30	24	41	37	39	21	19	18
Scotland	32	35	32	39	41	35	44	40	35
Wales	22	26	31	31	33	37	27	20	21
<b>UK</b>	<b>35</b>	<b>40</b>	<b>37</b>	<b>44</b>	<b>50</b>	<b>47</b>	<b>313</b>	<b>263</b>	<b>239</b>
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	34	38	39	45	48	50	345	282	252
Northern Ireland	14	11	13	23	16	17	85	78	99
Scotland	31	30	34	37	37	41	56	48	47
Wales	19	29	24	24	33	29	38	31	23
<b>UK</b>	<b>32</b>	<b>36</b>	<b>37</b>	<b>42</b>	<b>45</b>	<b>47</b>	<b>524</b>	<b>439</b>	<b>421</b>



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: April 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	50	56	54	46	50	47	61	67	65	67	69	68
Northern Ireland	41	46	47	35	35	35	52	61	60	53	56	52
Scotland	47	0	53	43	0	44	55	0	63	60	0	62
Wales	42	50	55	35	37	40	51	63	64	52	54	56
<b>UK</b>	49	55	54	45	49	46	59	67	65	65	68	66



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

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	8	6	5	12	10	9	12	8	6	14	12	9
Northern Ireland	39	42	36	36	43	41	49	46	42	47	47	45
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	9	3	9	10	4
<b>UK</b>	9	7	6	13	11	10	12	9	7	15	13	10

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: April 2013 - 2015**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	30	34	34	169	33	37	38	235	37	46	44	96
Northern Ireland	8	10	9	87	22	21	16	24	26	31	33	33
Scotland	23	25	24	39	36	37	41	56	44	49	50	46
Wales	19	28	25	25	27	34	36	28	35	45	47	21
<b>UK</b>	28	32	32	320	33	36	38	343	38	46	45	196

**Table6: Occupancy Levels by Size: April 2013 - 2015**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	52	53	52	56	52	56	51	30	54	57	54	1296
Northern Ireland	25	40	43	21	43	47	51	18	49	47	60	14
Scotland	47	48	53	50	53	56	53	43	53	59	55	58
Wales	49	49	50	19	45	69	64	7	51	42	53	114
<b>UK</b>	51	52	52	146	52	56	52	98	54	56	54	1482



**Table 7: Occupancy Levels by Size: April 2013 – 2015**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 -3 Rooms</b>				<b>4 – 10 Rooms</b>				<b>11 – 25 Rooms</b>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	38	41	44	169	44	47	49	235	50	61	56	96
Northern Ireland	15	14	13	87	28	19	20	24	39	43	44	33
Scotland	30	32	30	39	44	43	46	56	55	60	61	46
Wales	24	34	29	25	33	41	43	28	44	57	53	21
<b>UK</b>	36	39	41	375	43	46	48	343	50	60	56	196

**Table 7: Occupancy Levels by Size: April 2013 - 2015**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 – 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	67	68	62	56	69	65	69	30	76	78	77	1296
Northern Ireland	41	61	60	21	61	64	68	18	54	73	79	14
Scotland	63	63	68	50	71	74	71	43	75	79	78	58
Wales	64	63	65	19	65	72	74	7	74	75	77	114
<b>UK</b>	66	67	63	146	69	67	70	98	75	78	77	1482



**Table 8: Occupancy Levels by Location Types: April 2013 - 2015**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	42	47	44	180	56	59	56	1011	42	47	45	377	44	44	44	314
Northern Ireland	31	34	32	51	42	45	56	58	29	26	24	51	20	18	17	37
Scotland	44	43	49	39	51	0	53	114	36	0	40	59	36	0	42	80
Wales	44	52	51	29	50	42	42	7	37	52	41	12	27	36	37	55
<b>UK</b>	42	46	45	299	55	58	55	1190	41	47	44	499	41	43	43	486

**Table 8: Occupancy Levels by Location Types: April 2013 - 2015**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	53	58	61	180	74	78	76	1011	61	64	63	377	57	58	57	314
Northern Ireland	40	42	41	51	62	67	74	58	41	38	35	51	24	34	21	37
Scotland	52	61	62	39	70	0	73	114	51	0	54	59	46	0	49	80
Wales	55	60	59	29	69	73	54	7	62	55	54	12	35	47	45	55
<b>UK</b>	53	58	61	299	73	77	74	1190	59	63	61	499	54	57	54	486



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2013 – 2015 (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>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	**	**	**	**	19	27	28	27	21	30	30	90
Northern Ireland	**	**	**	**	7	4	9	29	17	15	19	57
Scotland	**	**	**	**	29	42	26	6	29	54	28	42
Wales	**	**	**	**	22	9	11	3	24	26	27	23
<b>UK</b>	**	**	**	**	20	28	26	65	22	33	29	212

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2013 – 2015 (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>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	38	42	42	123	38	47	45	74	52	55	52	1538
Northern Ireland	21	30	30	33	36	44	49	18	42	43	54	59
Scotland	35	39	36	35	45	42	50	37	51	51	53	172
Wales	20	39	34	15	48	65	44	16	45	48	52	154
<b>UK</b>	36	41	40	206	40	47	46	145	51	54	52	1923

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2013 – 2015 (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>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	**	**	**	**	36	37	40	27	30	40	38	90
Northern Ireland	**	**	**	**	14	6	10	29	22	18	24	57
Scotland	**	**	**	**	37	50	24	6	39	73	35	42
Wales	**	**	**	**	35	12	17	3	31	32	33	23
<b>UK</b>	**	**	**	**	36	37	36	65	31	44	37	212

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2013 – 2015 (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>			
	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015	2013	2014	2015	Sample Size 2015
England	46	53	54	123	46	56	58	74	70	72	71	1538
Northern Ireland	25	43	46	33	56	64	67	18	60	65	71	59
Scotland	47	55	49	35	58	49	67	37	68	60	69	172
Wales	36	56	43	15	57	62	57	16	61	67	66	154
<b>UK</b>	45	53	53	206	49	55	59	145	69	70	70	1923

\*\* 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 2013 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 2013) 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)

