



UNITED KINGDOM OCCUPANCY SURVEY

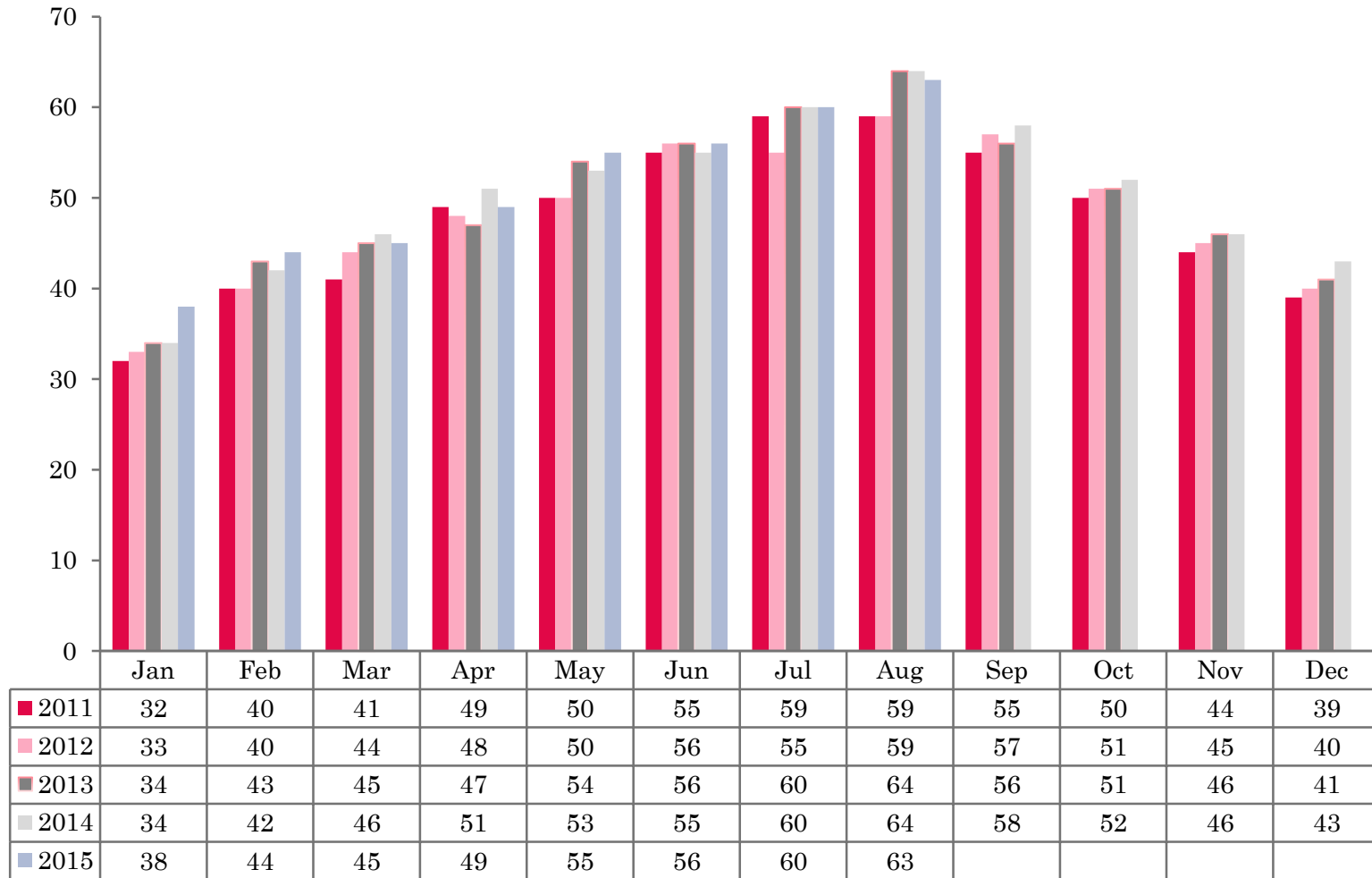
Serviced Accommodation Summary Report
August 2015

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



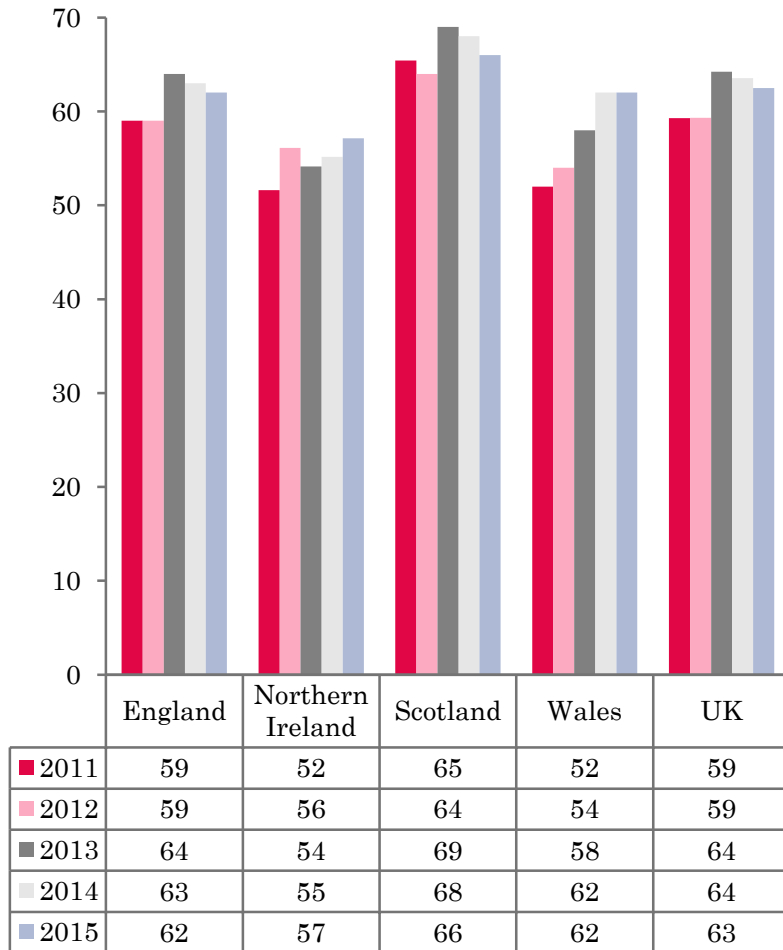
UK BEDROOM OCCUPANCY 2011 - 2015



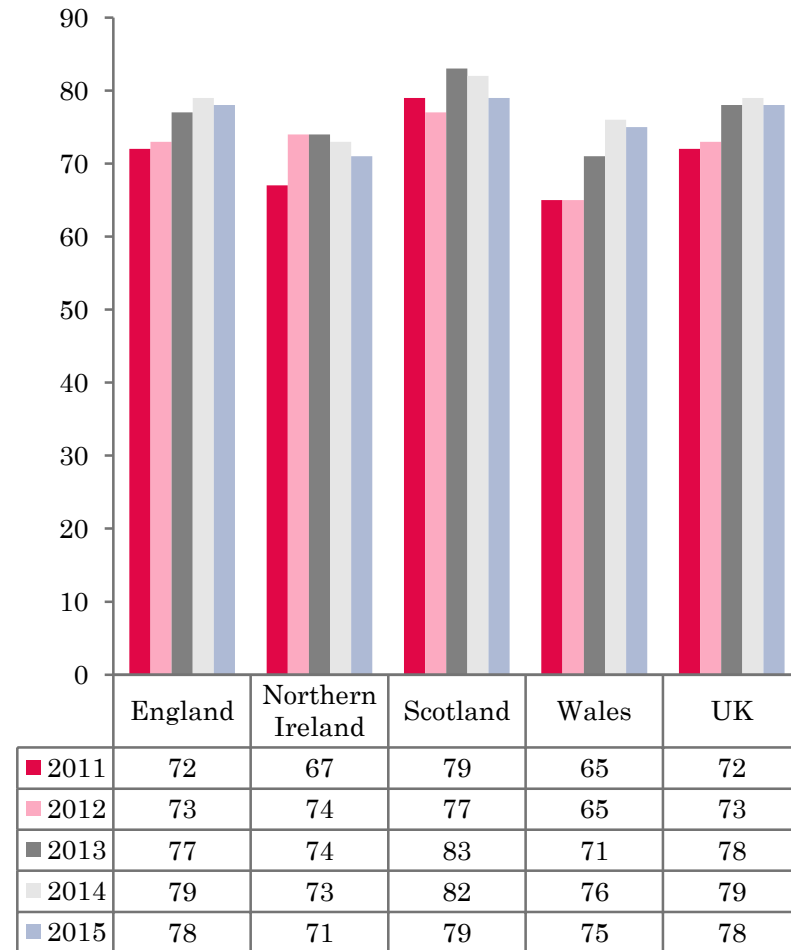
- ❖ 2,521 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (63%) had remained static when compared to August 2014. Room occupancy had also remained static when compared to the same period the previous year (78%).



NATIONAL BEDSPACE OCCUPANCY AUGUST 2011-2015



NATIONAL ROOM OCCUPANCY AUGUST 2011-2015



- During August 2015 both UK bedspace occupancy and room occupancy remained flat (-1%) when compared with the same month in 2014.
- England occupancy levels mirrored that of the UK, with bedspace occupancy levels remaining static at 62%, and room occupancy remaining flat (-1%) when compared with August 2014.
- Room occupancy levels in Northern Ireland fell slightly (-2%) when compared to the same period last year. However bedspace occupancy was up to 57%, an increase of 2% on August 2014.
- Wales bedspace occupancy levels remained on a par at 62% during August, when compared to the same period in 2014. Room occupancy remained flat (-1%) when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland fell slightly during August 2015. Room occupancy was down by 3% and bedspace occupancy by 2%.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained flat when compared with the previous year. Both Northern Ireland and England mirrored the UK remaining static, with Wales falling slightly (-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: August 2013 - 2015

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	64	63	62	77	79	78	2013	1885	1841
Northern Ireland	54	55	57	74	73	71	183	180	180
Scotland	69	68	66	83	82	79	314	303	287
Wales	58	62	62	71	76	75	137	119	213
UK	64	64	63	78	79	78	2647	2487	2521

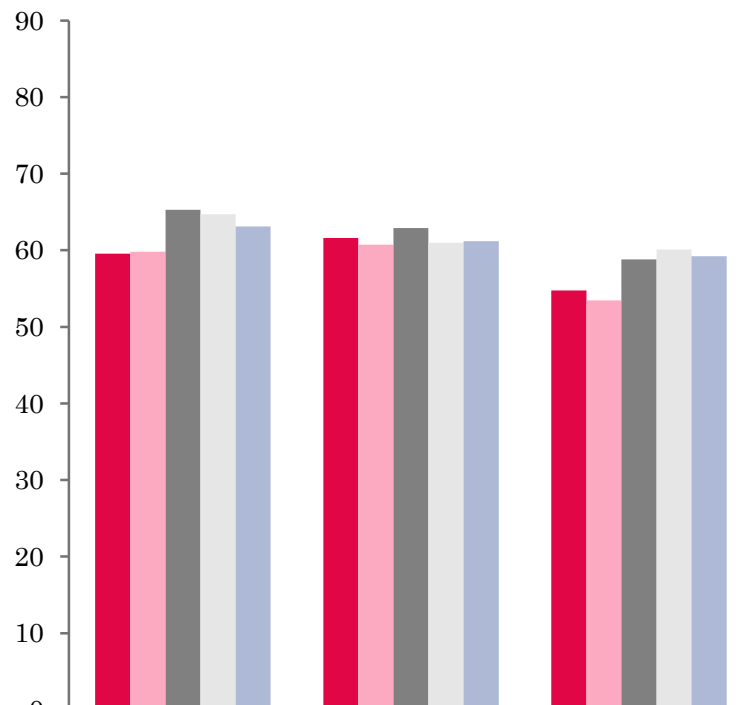
Table 2: UK/Non UK Occupancy Levels August 2013 – 2015 (see note 5a and 5b Slide 19)

	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	54	54	53	9	7	7	14	11	11	14	12	12	2013	1885	1841
Northern Ireland	28	25	27	26	30	30	49	45	45	48	54	53	183	180	180
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	314	303	287
Wales	54	57	55	6	7	5	**	**	**	10	10	8	137	119	213
UK	53	53	52	9	8	7	15	12	12	15	13	13	2647	2487	2521

** FIGURES NOT AVAILABLE

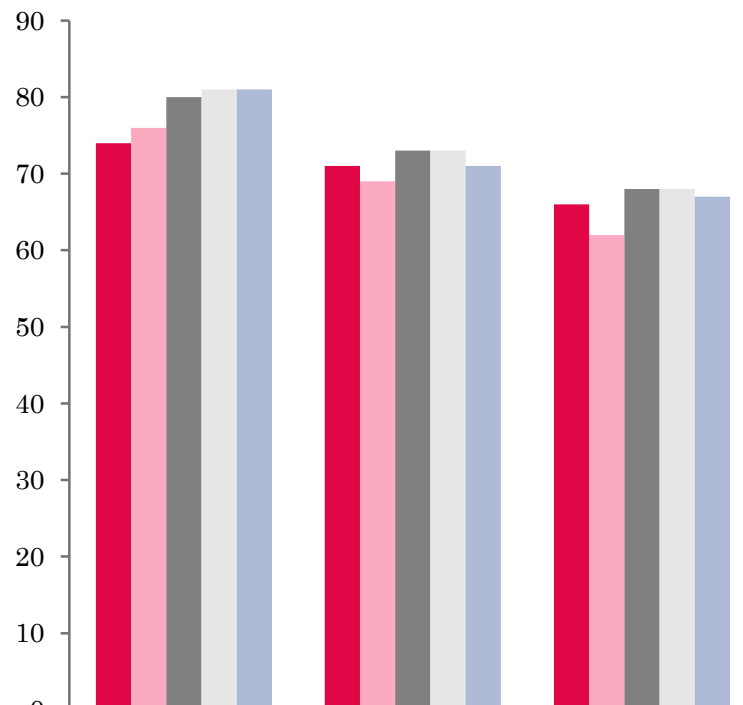


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION AUGUST 2011-2015



	Hotels	Guesthouses	B&Bs
2011	60	62	55
2012	60	61	53
2013	65	63	59
2014	65	61	60
2015	63	61	59

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



	Hotels	Guesthouses	B&Bs
2011	74	71	66
2012	76	69	62
2013	80	73	68
2014	81	73	68
2015	81	71	67



- Room occupancy levels across both hotel and B&B establishment types remained static during August 2015. Guesthouses witnessed a drop in room occupancy levels, down 2% on August 2014. Bed occupancy in the Hotel sector, was down to 63%, a fall of 2% compared to the same period last year. Bed occupancy remained static in both the B&B and Guesthouse sector.
- At the UK level, both room and bed occupancy levels in four out of the six size bands had fallen when compared to August 2014. The largest of these was in bed occupancy in the 51-100 size banding, where occupancy was down by 5% when compared to August 2014. An increase in bed occupancy was found in the 11-25 size banding, up 2% on the same period last year. The 1-3 size banding witnessed the largest fall in room occupancy, down by 3% on August 2014. Room occupancy in both the 11-25 and 51-100 size bandings remained static.
- Both the City/Large Town and countryside/village locations remained static in bedspace occupancy during August 2015. The only increase in bed occupancy levels, was found in small town locations, up by 4%. Bed occupancy levels in seaside locations had fallen by 7% when compared to August 2014. Both City/Large Town and countryside/village locations decreased in room occupancy, with seaside locations remaining static and small town up by 3%.
- Three out of the five tariff bandings fell in both levels of occupancy during August. The £30.00-£39.99 tariff band witnessed the largest decrease in bed occupancy, down by 7% when compared with August 2014. The £20.00-£29.99 tariff band witnessed the largest downturn in room occupancy levels, down by 9% on the same period last year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	65	64	62	79	80	80	1483	1454	1457
Northern Ireland	59	61	65	82	81	81	78	79	81
Scotland	69	68	68	85	84	84	213	209	203
Wales	61	67	65	77	80	79	72	69	173
UK	65	65	63	80	81	81	1846	1811	1914
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	63	61	62	73	74	73	207	168	151
Northern Ireland	47	42	36	61	51	49	15	20	20
Scotland	70	68	63	78	77	67	44	39	34
Wales	47	48	54	54	58	62	26	19	19
UK	63	61	61	73	73	71	292	246	224
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	58	60	60	68	68	68	323	263	233
Northern Ireland	34	41	36	44	54	41	90	81	79
Scotland	68	66	62	75	76	70	57	55	50
Wales	54	52	49	64	59	54	39	31	21
UK	59	60	59	68	68	67	509	430	383



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: August 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	67	66	58	58	59	66	78	78	77	76	78	78
Northern Ireland	62	62	62	53	57	52	79	76	73	75	76	67
Scotland	71	70	68	66	65	64	82	81	78	84	83	82
Wales	64	64	68	53	59	57	74	76	78	70	75	74
UK	67	66	60	59	60	65	78	78	77	77	79	78



Table 5: Non-UK Percentages: August 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	11	9	13	16	13	10	14	10	13	18	13	11
Northern Ireland	50	43	42	56	47	46	49	54	47	52	58	51
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	9	10	8	10	11	9
UK	12	10	14	17	14	11	15	11	14	18	14	12

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: August 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	53	54	51	157	61	65	63	217	62	57	60	91
Northern Ireland	31	39	29	70	45	40	40	22	47	43	47	33
Scotland	66	60	53	39	70	71	67	57	68	70	68	44
Wales	51	51	46	24	56	56	60	29	52	61	65	23
UK	54	54	51	290	62	65	63	325	62	59	61	191

Table6: Occupancy Levels by Size: August 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	69	67	64	52	67	73	66	27	61	63	62	1297
Northern Ireland	39	66	61	21	60	64	66	19	68	60	67	15
Scotland	69	68	67	49	70	65	70	39	68	70	68	59
Wales	63	69	64	21	67	76	75	8	56	67	61	111
UK	68	67	64	143	67	72	67	93	62	64	63	1482



Table 7: Occupancy Levels by Size: August 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	61	61	59	157	71	73	71	217	73	71	72	91
Northern Ireland	41	53	35	70	55	51	44	22	64	56	63	33
Scotland	74	71	64	39	78	80	72	57	81	82	81	44
Wales	60	55	50	24	64	68	70	29	63	68	73	23
UK	62	62	59	375	71	73	71	325	74	72	73	191

Table 7: Occupancy Levels by Size: August 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	80	77	76	52	78	78	78	27	80	83	82	1297
Northern Ireland	69	78	76	21	82	82	80	19	90	85	85	15
Scotland	85	87	83	49	86	80	85	39	91	90	88	59
Wales	77	79	78	21	81	83	78	8	83	93	85	111
UK	80	79	77	143	79	79	79	93	82	85	83	1482



Table 8: Occupancy Levels by Location Types: August 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	76	75	65	169	64	64	63	1010	56	54	59	365	65	62	62	297
Northern Ireland	58	63	59	43	58	61	64	63	41	40	45	44	38	35	27	30
Scotland	73	67	68	36	70	69	68	121	59	60	56	53	71	73	68	77
Wales	70	74	74	28	55	55	53	9	55	66	65	13	51	51	55	58
UK	75	73	66	276	64	64	63	1203	56	55	59	475	65	63	62	462

Table 8: Occupancy Levels by Location Types: August 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	79	82	80	169	81	83	81	1010	73	71	75	365	76	75	73	297
Northern Ireland	75	76	71	43	81	82	80	63	55	50	52	44	47	50	38	30
Scotland	84	77	80	36	88	88	86	121	76	74	71	53	80	82	75	77
Wales	81	81	82	28	78	87	71	9	70	78	77	13	61	62	64	58
UK	80	81	80	276	82	84	81	1203	73	71	74	475	75	75	72	462

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	**	**	**	**	51	57	52	28	52	52	45	77
Northern Ireland	**	**	**	**	37	27	28	18	38	50	29	50
Scotland	**	**	**	**	49	47	51	5	65	61	58	39
Wales	**	**	**	**	39	41	26	4	49	50	46	22
UK	**	**	**	**	50	54	50	55	54	53	47	188

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	65	65	62	118	61	60	62	66	63	63	62	1552
Northern Ireland	43	47	56	33	52	57	58	14	61	60	65	65
Scotland	68	61	60	41	74	72	72	25	71	72	70	177
Wales	45	40	54	16	59	76	60	18	66	71	68	153
UK	64	63	61	208	63	63	63	123	64	65	64	1947

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) August 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	**	**	**	**	62	66	60	28	64	63	57	77
Northern Ireland	**	**	**	**	48	53	31	18	56	57	38	50
Scotland	**	**	**	**	59	51	32	5	77	72	67	39
Wales	**	**	**	**	45	58	37	4	59	59	56	22
UK	**	**	**	**	60	63	54	55	66	64	58	188

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) August 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	76	74	70	118	70	72	72	66	79	80	80	1552
Northern Ireland	67	61	66	33	66	75	71	14	83	81	81	65
Scotland	79	73	74	41	88	87	84	25	86	87	85	177
Wales	64	65	65	16	67	80	74	18	81	84	82	153
UK	76	73	70	208	72	75	74	123	80	81	81	1947

** 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)

