



# UNITED KINGDOM OCCUPANCY SURVEY

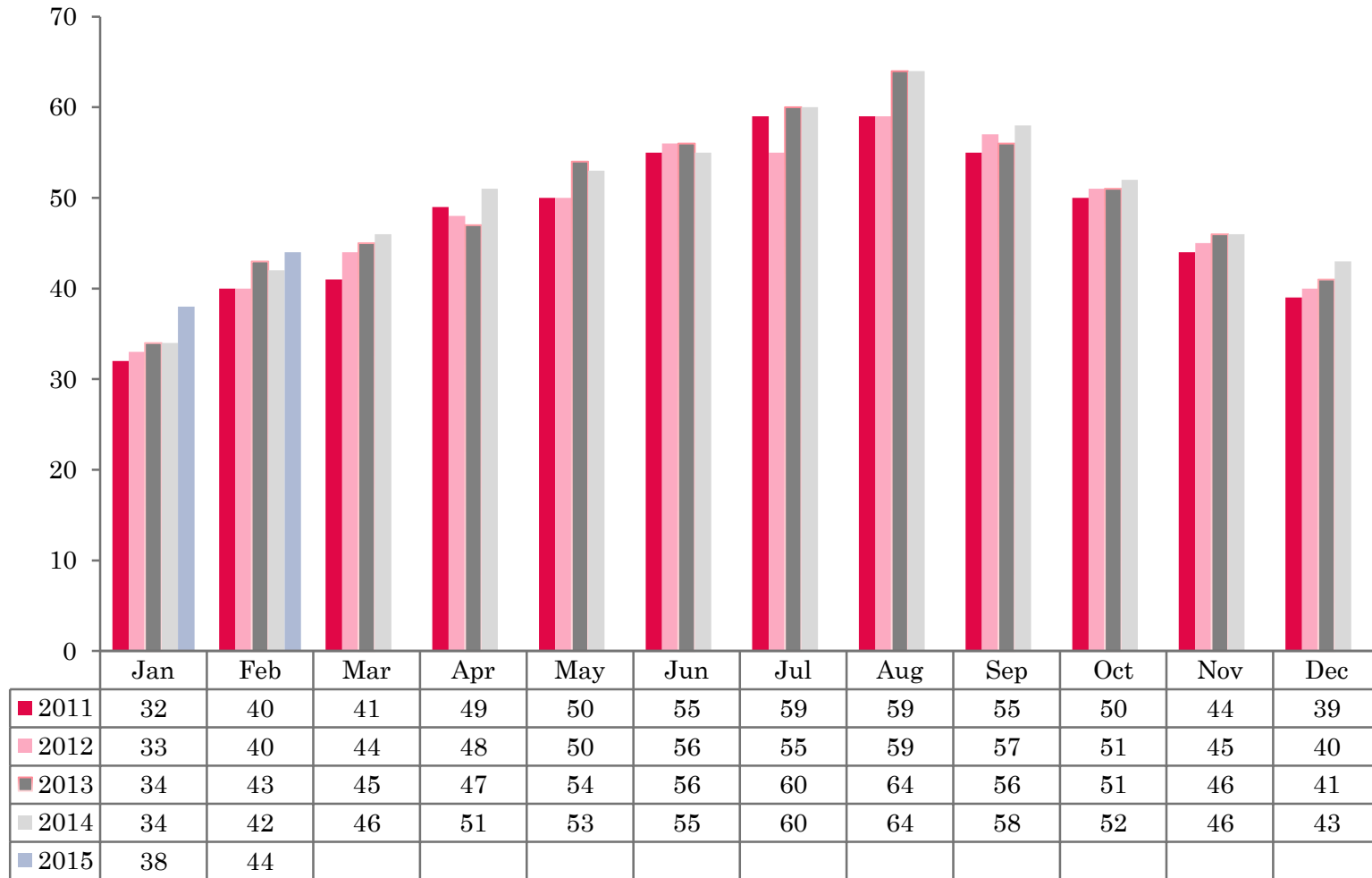
Serviced Accommodation Summary Report  
February 2015

# UK OCCUPANCY SURVEY

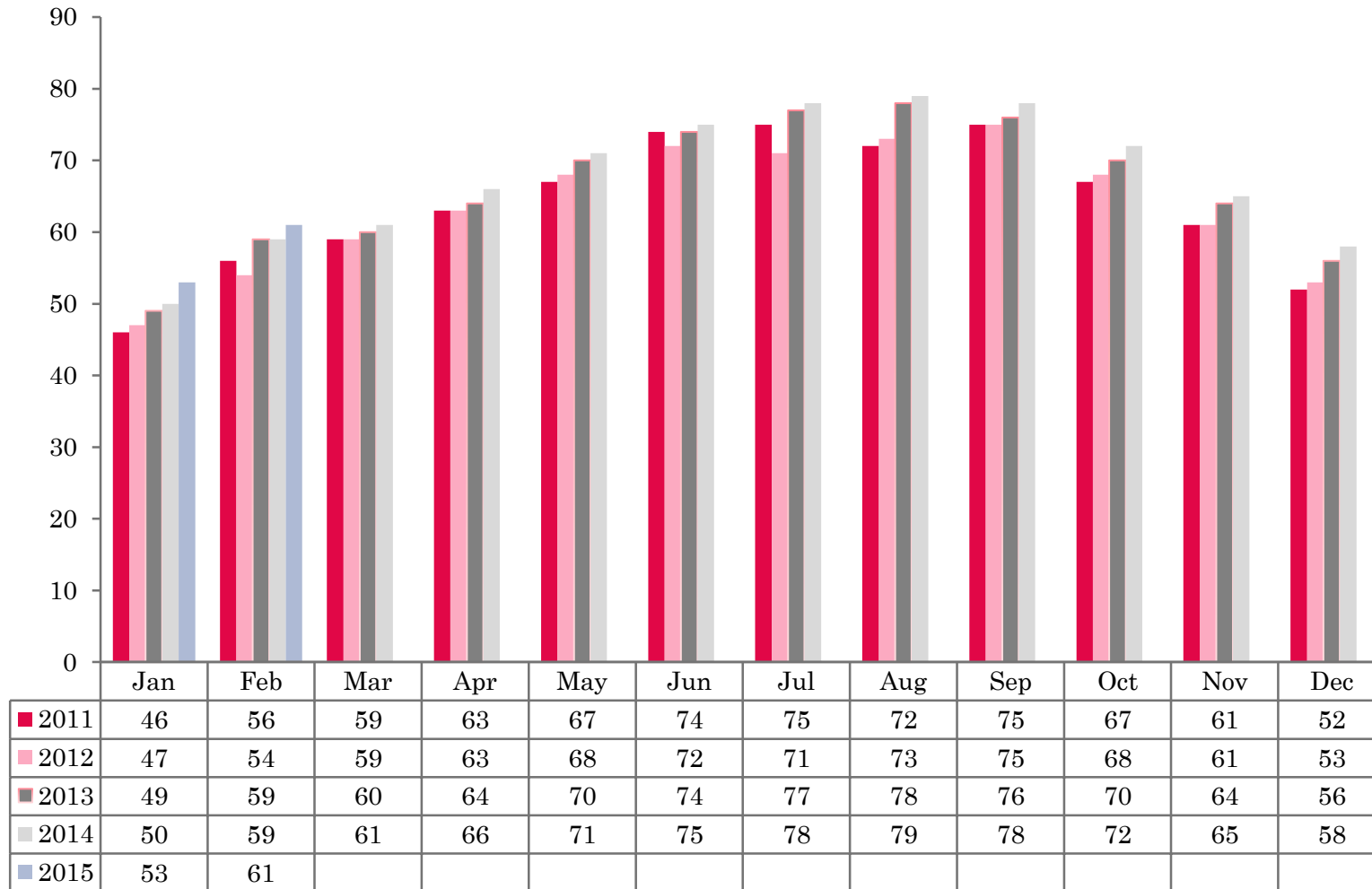
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2011 - 2015



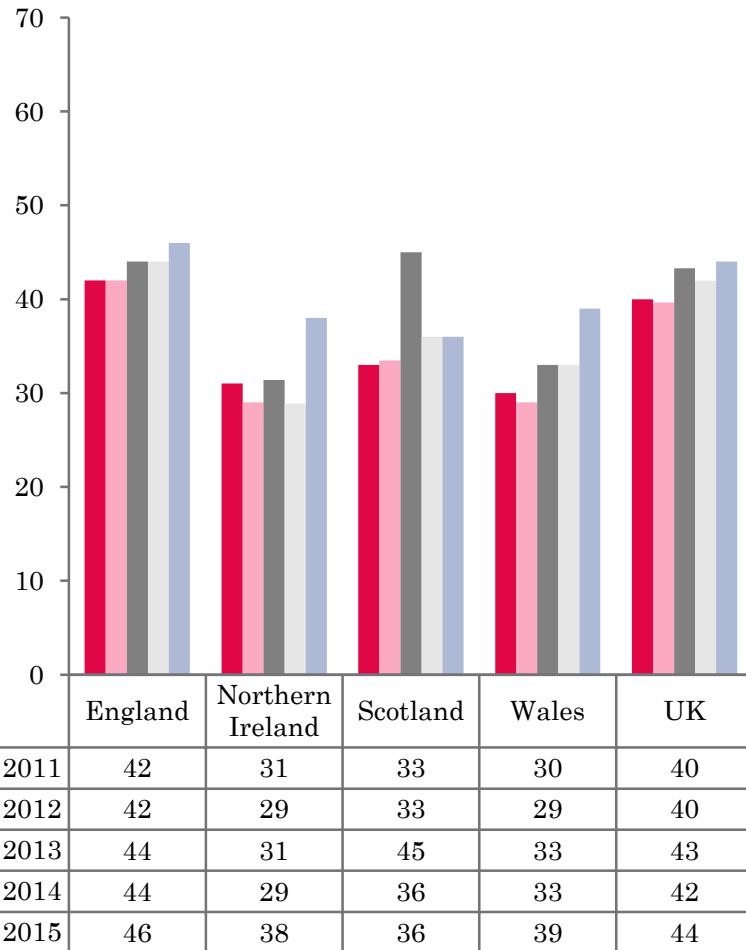
# UK BEDROOM OCCUPANCY 2011 - 2015



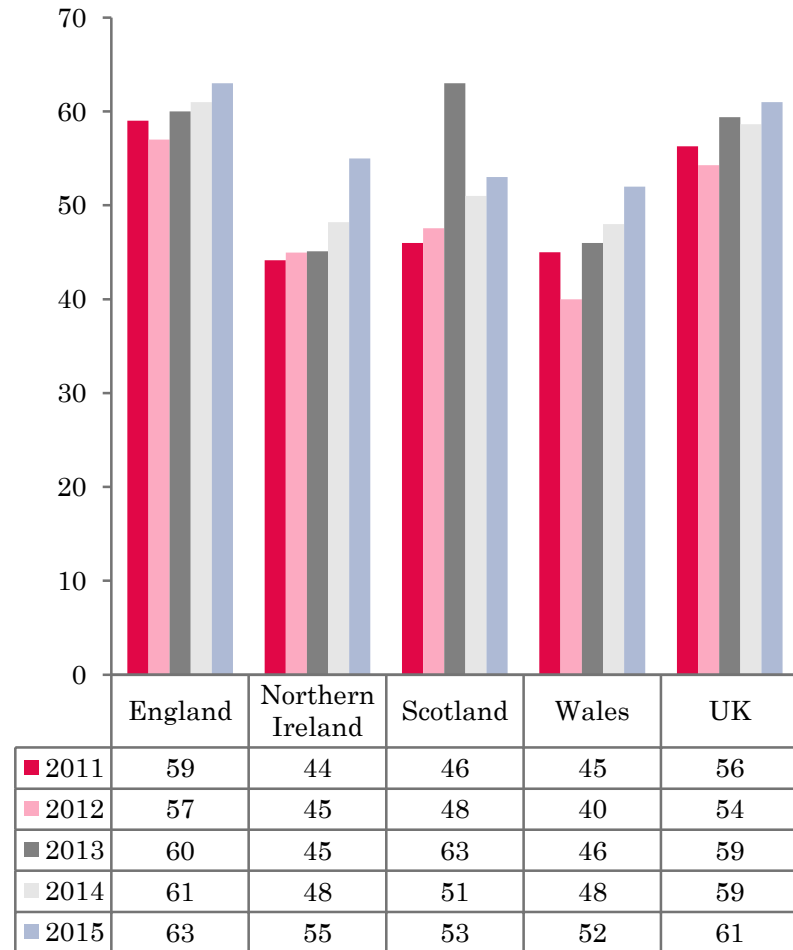
- ❖ 2,482 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (44%) and room occupancy (61%) had both increased when compared to February 2014.



## NATIONAL BEDSPACE OCCUPANCY FEBRUARY 2011-2015



## NATIONAL ROOM OCCUPANCY FEBRUARY 2011-2015



- During February 2015 both room and bedspace occupancy had witnessed an increase in occupancy levels of 2% respectively, when compared with the same month in 2014.
- England mirrored the UK, with room and bedspace occupancy rising by 2% when compared with February 2014.
- Room occupancy in Northern Ireland increased by 7% when compared to the same month in 2014. Bedspace occupancy fared even better with an increase of 9% on February 2014.
- Wales also witnessed an increase in both room and bedspace occupancy levels during February. Room occupancy was up by 4%, with bedspace occupancy levels rising by 6% when compared with the same period the previous year.
- Bedspace occupancy across Scotland remained flat during February 2015 with room occupancy faring slightly better, up 2% on the same period in 2014.
- 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 uplift of 5% on February 2014 whilst both England and Wales remained static during February 2015. (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 2013 - 2015**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	44	44	46	60	61	63	1483	1912	1833
Northern Ireland	31	29	38	45	48	55	142	201	186
Scotland	45	36	36	63	51	53	286	285	259
Wales	33	33	39	46	48	52	121	114	204
<b>UK</b>	43	42	44	59	59	61	2032	2512	2482

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

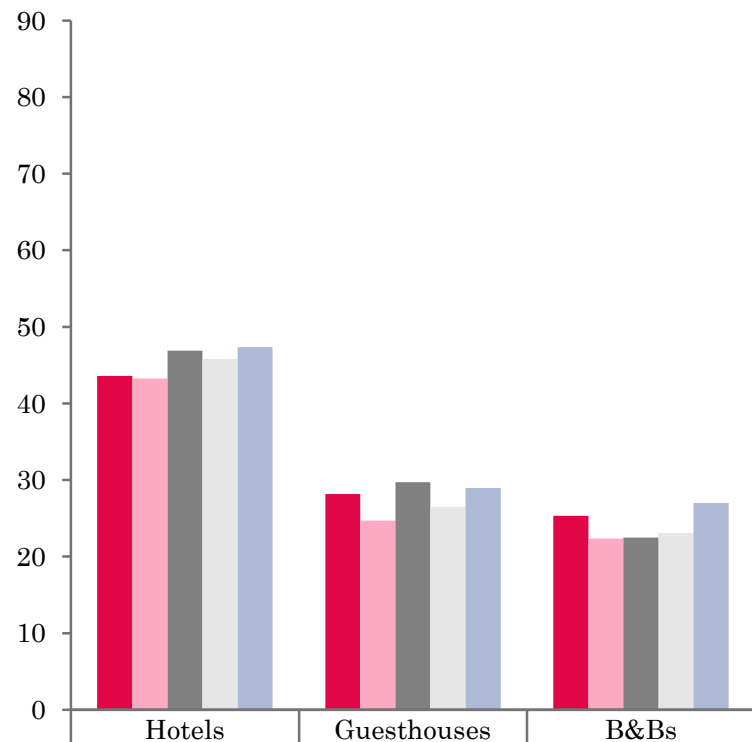
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	29	27	32	5	2	2	9	5	5	15	8	7	1483	1912	1833
Northern Ireland	20	13	19	11	15	20	28	35	29	35	53	52	142	201	186
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	286	285	259
Wales	29	26	29	1	1	1	**	**	**	4	5	3	121	114	204
<b>UK</b>	29	27	31	5	2	2	10	6	6	15	9	8	2032	2512	2482

\*\* FIGURES NOT AVAILABLE



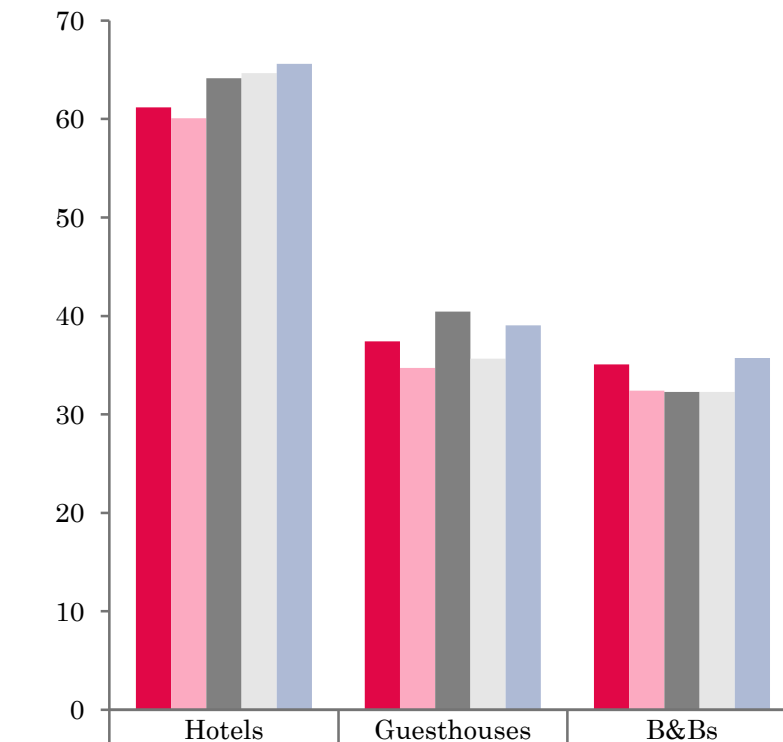


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION FEBRUARY 2011-2015



	Hotels	Guesthouses	B&Bs
2011	44	28	25
2012	43	25	22
2013	47	30	22
2014	46	26	23
2015	47	29	27

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



	Hotels	Guesthouses	B&Bs
2011	61	37	35
2012	60	35	32
2013	64	40	32
2014	65	36	32
2015	66	39	36



- Both room and bed occupancy across all sectors had increased during February 2015. The B&B sector fared best with both room and bedspace occupancy increasing by 4% respectively. Guesthouse room and bedspace occupancy levels were up by 3% each on 2014 data with Hotel occupancy remained static (+1) in both measures of occupancy when compared with the same period in 2014.
- Occupancy levels in all of the size bands had either increased or remained static in both measures of occupancy when compared to February 2014. The biggest movement in bedspace occupancy was in both the 4-10 and 11-25 size bandings where levels were up 5% and 3% respectively on the same period last year. Room occupancy levels in the 1-3 rose by 4% and by 5% in the 4-10 band, the largest in room occupancy.
- Across all locations, both room and bed occupancy had increased or remained static when compared to 2014 data. Seaside locations witnessed the biggest increase in both room and bed occupancy, up by 5% respectively during February 2015. Small town was up by 2% in both room and bedspace occupancy, with both Countryside/village and City/Large town locations remaining flat in both measures of occupancy when compared to February 2014.
- With the exception of the £30.00-£39.99 tariff band, all other bandings witnessed an increase in both room and bedspace occupancy levels during February. Room occupancy in the £20.00-£29.99 and £40.00-£49.99 tariff band rose by 5% respectively on 2014 data. Both the £50.00-£59.00 and >£60.00 also increased in room occupancy, each up by 3% compared to February 2014. The £50.00-£59.99 witnessed an increase in bedspace occupancy of 3%, whilst the £20.00-£29.99, £40.00-£49.99 and >£60.00 all saw a rise of 2% in bedspace



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	48	47	48	65	66	67	984	1464	1455
Northern Ireland	37	36	46	53	60	64	47	84	74
Scotland	45	43	39	64	61	60	211	217	201
Wales	39	39	45	56	56	60	65	67	168
<b>UK</b>	47	46	47	64	65	66	1307	1832	1898
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	31	29	31	42	39	42	198	176	147
Northern Ireland	27	19	13	38	27	25	18	27	19
Scotland	28	19	25	39	24	32	35	30	24
Wales	16	12	15	22	20	19	24	18	16
<b>UK</b>	30	26	29	40	36	39	275	251	206
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	24	25	29	35	35	39	314	272	231
Northern Ireland	11	5	10	18	11	15	77	90	93
Scotland	17	19	21	23	26	27	40	38	34
Wales	19	12	15	22	17	18	32	29	20
<b>UK</b>	22	23	27	32	32	36	463	429	378



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: February 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	46	47	42	42	44	54	56	57	62	64	66
Northern Ireland	36	38	45	28	25	29	46	58	60	46	50	50
Scotland	50	41	37	40	33	34	61	50	52	65	52	54
Wales	37	37	45	30	28	34	45	46	53	46	46	52
<b>UK</b>	45	45	45	41	40	42	54	55	56	61	61	63



**Table 5: Non-UK Percentages: February 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	7	4	4	11	6	6	15	7	7	18	9	9
Northern Ireland	24	29	26	33	35	24	30	41	29	40	45	27
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	4	2	3	5	3	4
<b>UK</b>	7	5	5	12	7	6	15	8	7	18	10	9

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: February 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	18	20	22	150	23	23	28	214	32	33	36	92
Northern Ireland	14	6	5	82	18	8	15	24	25	21	27	30
Scotland	13	14	16	26	23	26	31	45	38	38	36	39
Wales	12	9	16	20	21	16	23	23	38	22	43	21
<b>UK</b>	17	18	20	278	23	23	28	306	33	33	36	182

**Table6: Occupancy Levels by Size: February 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	46	44	45	54	51	43	46	31	50	52	52	1292
Northern Ireland	24	27	24	19	35	38	46	20	44	40	53	11
Scotland	42	39	37	51	47	48	33	41	46	49	50	57
Wales	46	34	39	20	41	35	52	9	41	33	49	109
<b>UK</b>	45	42	43	144	50	43	44	101	49	50	52	1469



**Table 7: Occupancy Levels by Size: February 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	25	27	31	150	33	33	38	214	46	47	50	92
Northern Ireland	22	10	9	82	26	12	22	24	36	35	38	30
Scotland	20	20	23	26	32	33	39	45	48	52	47	39
Wales	17	10	18	20	26	22	28	23	40	32	49	21
<b>UK</b>	24	25	29	375	32	32	37	306	46	47	49	182

**Table 7: Occupancy Levels by Size: February 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	60	61	59	54	65	57	57	31	71	73	75	1292
Northern Ireland	40	50	54	19	52	55	59	20	60	69	70	11
Scotland	57	56	54	51	66	68	67	41	66	70	71	57
Wales	58	49	54	20	59	50	62	9	67	59	72	109
<b>UK</b>	59	59	58	144	65	58	59	101	70	72	74	1469



**Table 8: Occupancy Levels by Location Types: February 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	32	29	35	165	51	53	53	1007	40	40	42	372	35	35	35	289
Northern Ireland	29	21	24	46	37	35	49	59	23	22	23	49	15	10	11	32
Scotland	37	32	34	28	47	45	40	113	36	26	30	56	43	32	32	62
Wales	42	36	41	28	45	41	44	7	26	31	30	12	23	26	27	49
<b>UK</b>	33	30	35	267	50	51	51	1186	38	37	39	489	35	34	34	432

**Table 8: Occupancy Levels by Location Types: February 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	44	44	50	165	68	72	73	1007	58	58	60	372	47	48	50	289
Northern Ireland	39	29	36	46	54	60	66	59	32	30	32	49	24	26	21	32
Scotland	51	43	45	28	67	65	67	113	54	41	43	56	53	40	41	62
Wales	48	44	49	28	70	72	63	7	39	41	42	12	31	37	35	49
<b>UK</b>	45	44	49	267	68	71	71	1186	56	54	56	489	47	46	47	432



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	**	**	**	**	12	11	13	28	16	19	17	87
Northern Ireland	**	**	**	**	12	5	7	27	11	6	11	52
Scotland	**	**	**	**	24	18	16	8	28	18	21	30
Wales	**	**	**	**	11	3	6	4	20	15	18	19
<b>UK</b>	**	**	**	**	14	11	13	67	18	18	17	188

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	26	27	29	117	31	33	37	85	47	47	49	1516
Northern Ireland	20	24	27	34	24	38	50	15	39	33	45	58
Scotland	37	27	28	35	43	44	42	30	46	45	41	156
Wales	17	24	18	14	43	37	34	16	42	40	46	151
<b>UK</b>	27	27	28	200	33	35	38	146	46	46	48	1881

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	**	**	**	**	22	22	27	28	24	31	25	87
Northern Ireland	**	**	**	**	16	8	13	27	20	9	17	52
Scotland	**	**	**	**	33	27	33	8	45	28	27	30
Wales	**	**	**	**	14	5	9	4	25	23	22	19
<b>UK</b>	**	**	**	**	23	22	27	67	27	30	25	188

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	35	35	41	117	42	44	48	85	65	65	67	1516
Northern Ireland	28	38	36	34	33	61	67	15	55	56	63	58
Scotland	56	41	41	35	60	61	58	30	65	62	63	156
Wales	32	37	42	14	53	43	42	16	57	59	62	151
<b>UK</b>	38	36	41	200	45	47	50	146	64	64	66	1881

\*\* 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)

