



UNITED KINGDOM OCCUPANCY SURVEY

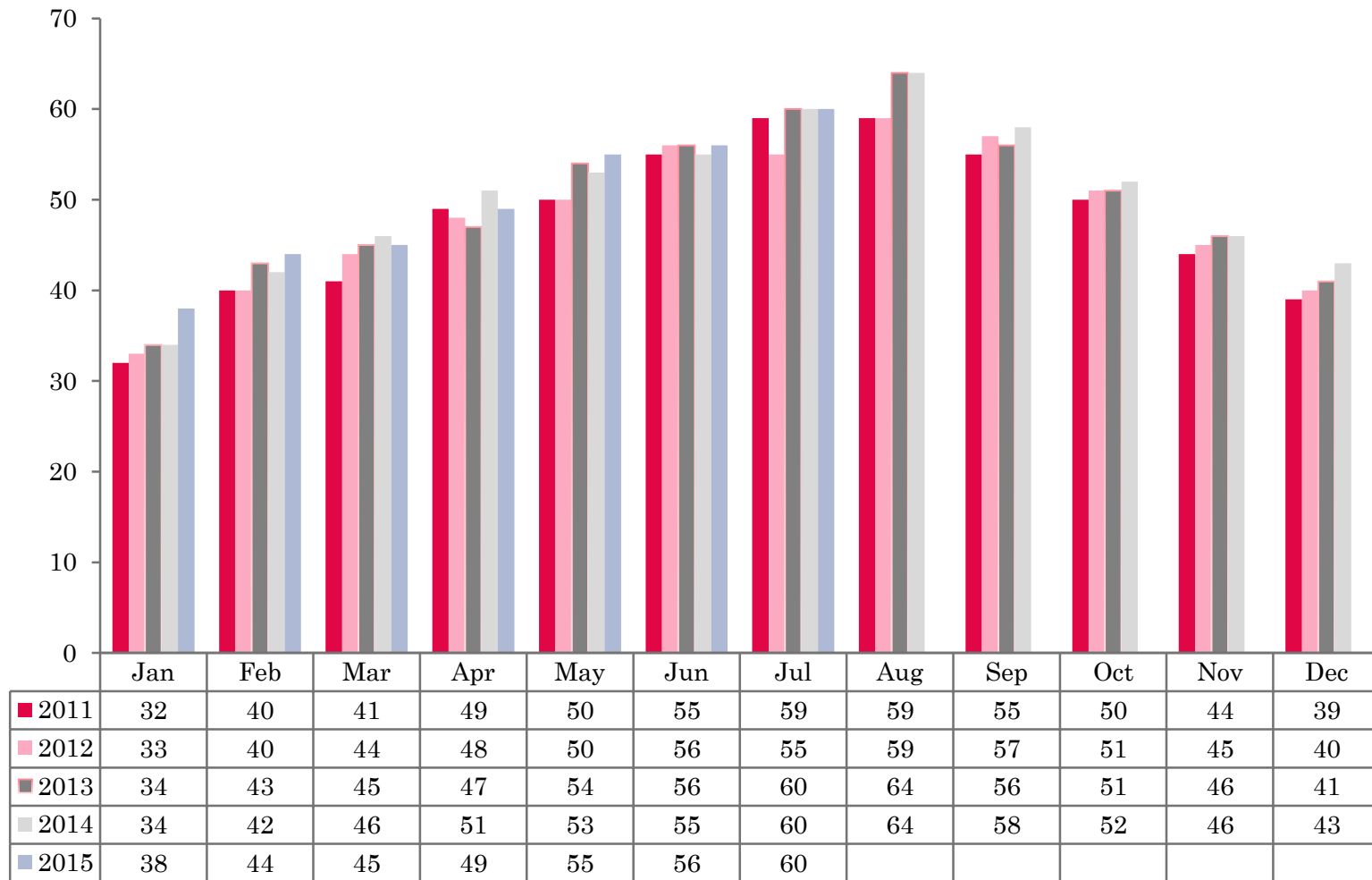
Serviced Accommodation Summary Report
July 2015

UK OCCUPANCY SURVEY

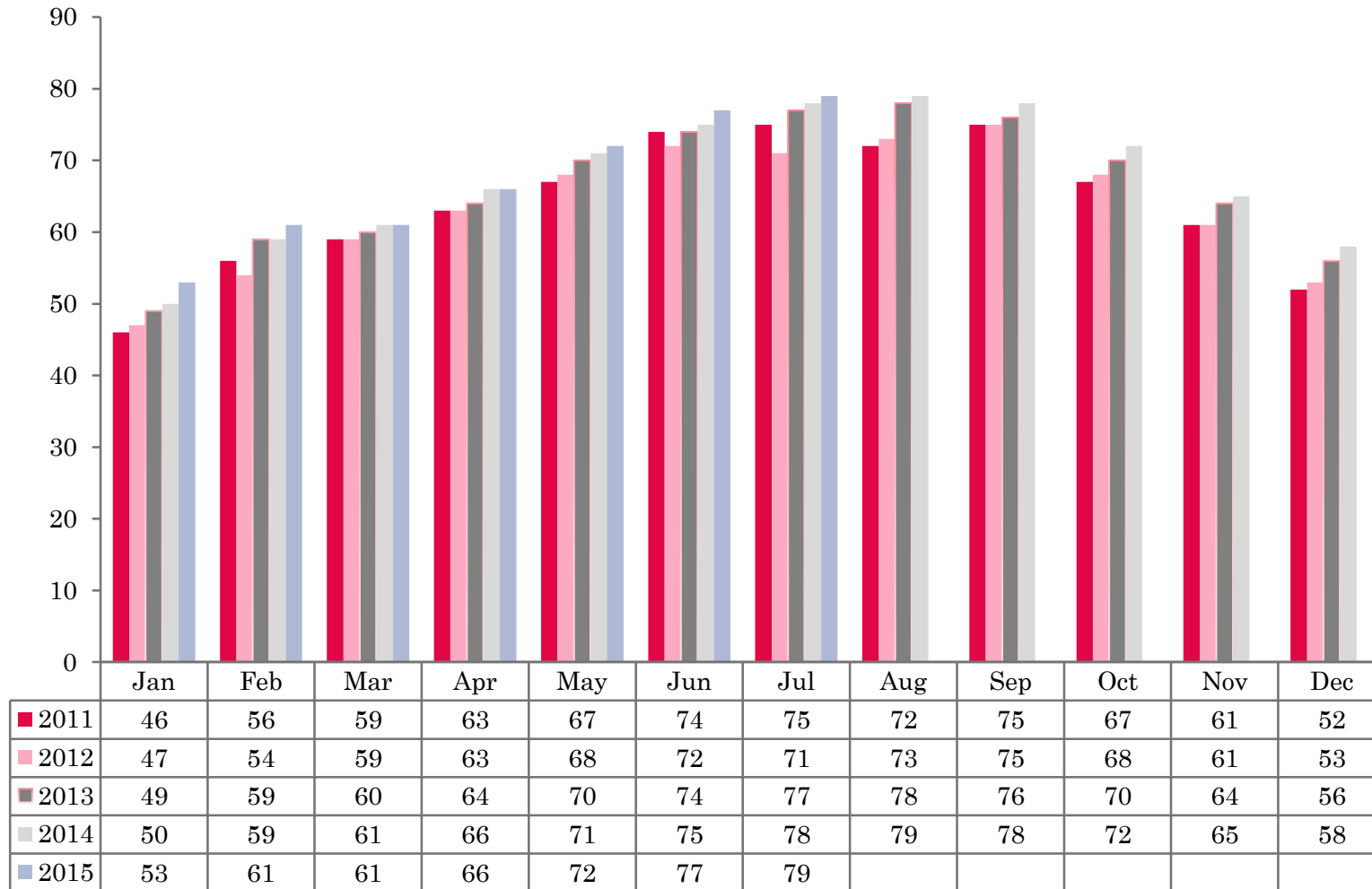
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2011 - 2015



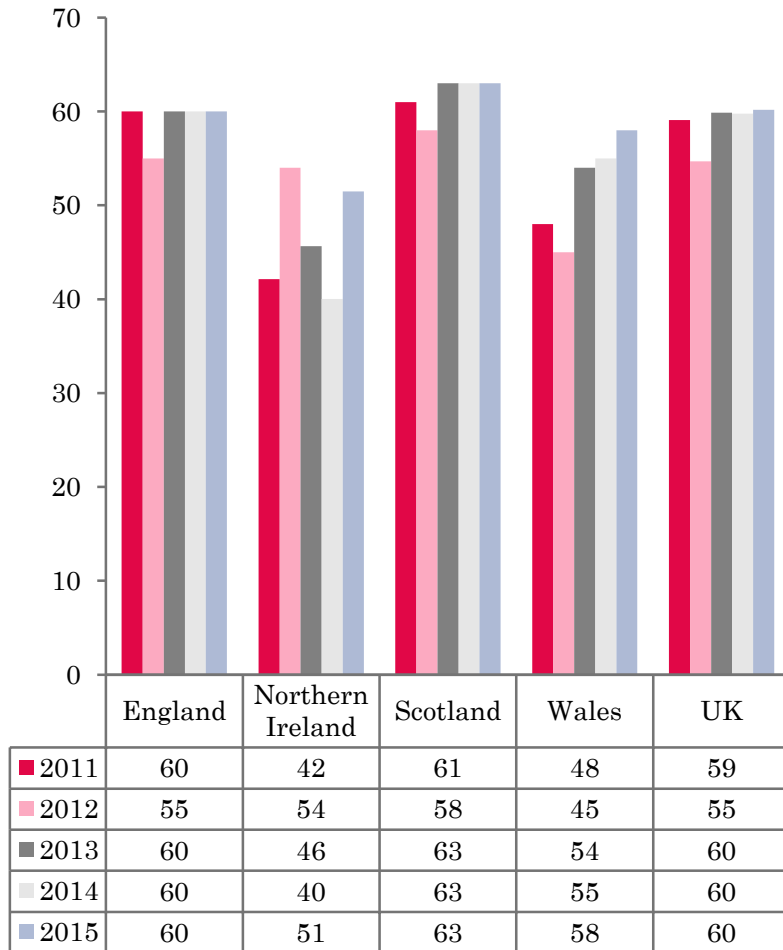
UK BEDROOM OCCUPANCY 2011 - 2015



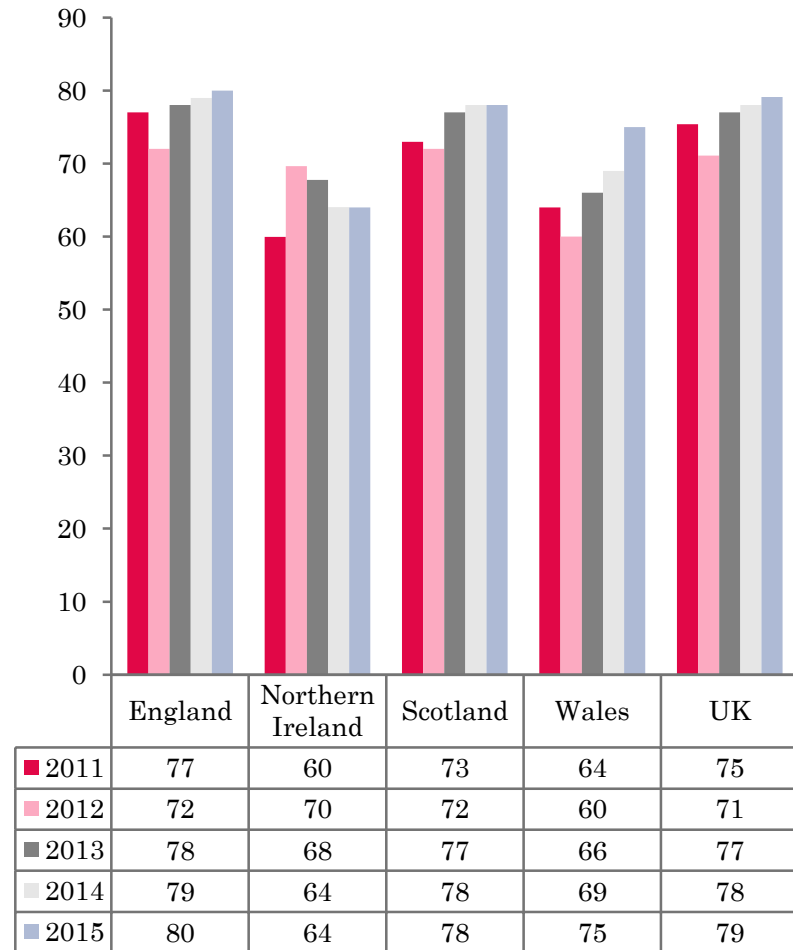
- ❖ 2,554 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (60%) had remained static when compared to July 2014. Room occupancy had increased by 1% when compared to the same period the previous year (79%).



NATIONAL BEDSPACE OCCUPANCY JULY 2011-2015



NATIONAL ROOM OCCUPANCY JULY 2011-2015



- During July 2015 UK bedspace occupancy was at 60%, the same as July 2014. 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 at 60%, and room occupancy remaining flat (+1%) when compared with July 2014.
- Room occupancy levels in Northern Ireland remained on a par when compared to the same period last year. Bedspace occupancy was up by a healthy margin, with an increase of 11% on July 2014.
- Wales bedspace occupancy levels witnessed a 3% increase during July, with bedroom occupancy levels fairing even better, up by 6% when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland remained static during July 2015.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained flat when compared with the previous year. Northern Ireland saw an increase of 10% on July 2014 whilst England mirrored the UK remaining static. Wales also remained static. (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: July 2013 - 2015

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	60	60	60	78	79	80	2080	1920	1868
Northern Ireland	46	40	51	68	64	64	173	180	189
Scotland	63	63	63	77	78	78	328	283	286
Wales	54	55	58	66	69	75	136	119	211
UK	60	60	60	77	78	79	2717	2502	2554

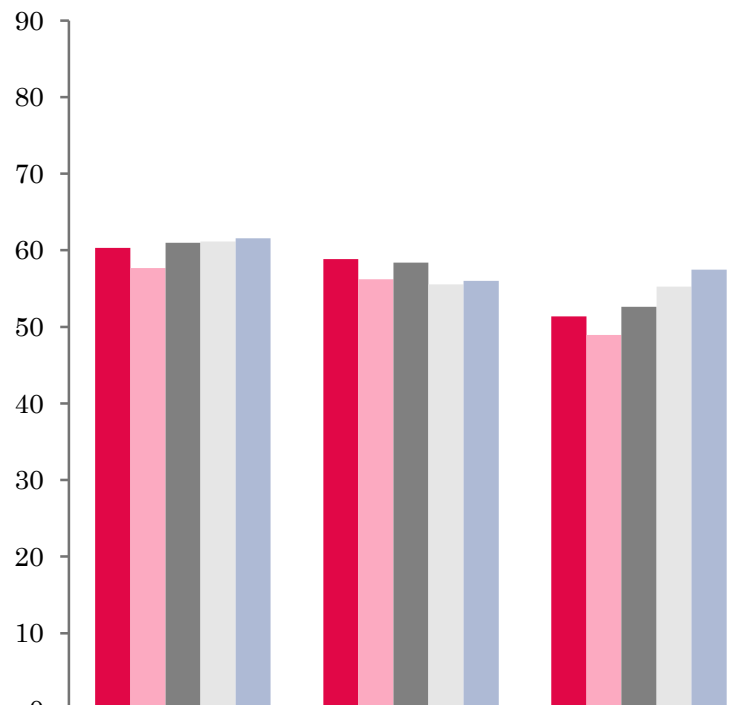
Table 2: UK/Non UK Occupancy Levels July 2013 – 2015 (see note 5a and 5b Slide 19)

	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	50	49	51	9	8	8	15	12	13	15	13	13	2080	1920	1868
Northern Ireland	25	21	23	21	19	29	38	42	43	46	47	56	173	180	189
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	328	283	286
Wales	49	49	49	5	6	6	**	**	**	10	11	11	136	119	211
UK	49	48	50	9	8	8	16	13	14	15	14	14	2717	2502	2554

** FIGURES NOT AVAILABLE

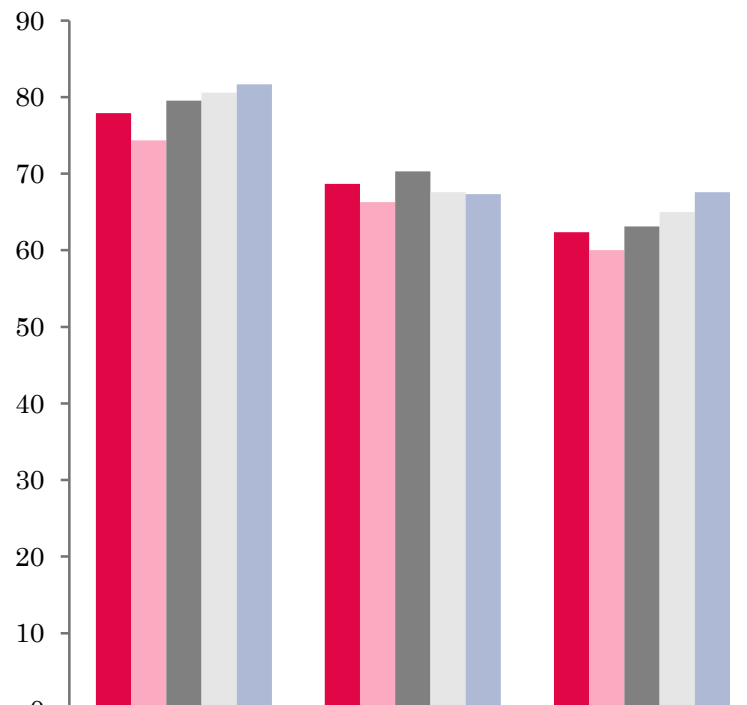


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JULY 2011-2015



	Hotels	Guesthouses	B&Bs
2011	60	59	51
2012	58	56	49
2013	61	58	53
2014	61	56	55
2015	62	56	57

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



	Hotels	Guesthouses	B&Bs
2011	78	69	62
2012	74	66	60
2013	80	70	63
2014	81	68	65
2015	82	67	68



- Both Room and bedspace occupancy levels across both hotel and guesthouse establishment types remained static during July 2015. Bed occupancy in the B&B sector, increased by 2%, whilst room occupancy rose by 3% when compared with the same period the previous year.
- At the UK level, occupancy levels in four out of the six size bands had remained static in bedspace occupancy when compared to July 2014. An increase was found in the 11-25 size banding which was up 2% on the same period last year. A 10% decrease was found in the 51-100 size banding, the only fall in bed occupancy. Four out of the six size bandings also remained static in their room occupancy levels during July 2015. An increase was found in both the 4-10 and 51-100 size banding where levels rose by 2% respectively.
- Both the City/Large Town and countryside/village locations remained static in both room and bedspace occupancy during July 2015. The only increase in bed occupancy levels, was found in small town locations, up by 2%. Seaside locations bed levels were down 2% when compared to July 2014. Both small town and seaside locations increased in room occupancy, up by 2% when compared to the same period the previous year.
- All tariff bandings either increased or remained static in both room and bedspace occupancy levels during July. The £30.00-£39.99 tariff band witnessed the largest increase in bed occupancy, up by 4% when compared with July 2014. The £50.00-£59.99 tariff band witnessed the largest increase in room occupancy levels, up by 3% on the same period last year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	61	61	61	80	81	82	1534	1467	1469
Northern Ireland	49	42	58	75	72	73	69	82	75
Scotland	64	65	65	80	82	82	223	199	202
Wales	57	60	61	73	74	79	66	68	167
UK	61	61	62	80	81	82	1892	1816	1913
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	58	56	57	71	69	69	212	174	156
Northern Ireland	51	43	24	67	51	36	19	21	16
Scotland	66	60	57	74	68	65	44	38	35
Wales	45	41	51	50	52	62	27	19	21
UK	58	56	56	70	68	67	302	252	228
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	52	56	58	63	66	69	334	279	243
Northern Ireland	29	29	36	38	36	40	85	77	98
Scotland	59	59	61	68	69	69	61	46	49
Wales	53	44	48	60	50	53	43	32	23
UK	53	55	57	63	65	68	523	434	413



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: July 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	63	62	64	56	57	57	75	75	76	79	80	81
Northern Ireland	45	47	54	45	42	48	68	68	65	67	66	64
Scotland	66	65	66	62	62	62	76	76	77	79	80	79
Wales	58	60	64	51	52	55	68	69	75	66	66	76
UK	63	62	64	56	57	57	75	75	76	78	79	80



Table 5: Non-UK Percentages: July 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	13	11	11	18	14	15	15	13	12	17	14	15
Northern Ireland	30	40	42	36	45	46	42	43	43	46	48	46
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	9	10	9	11	11	13
UK	13	12	12	18	15	16	15	14	13	17	15	16

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Table 6: Occupancy Levels by Size: July 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	47	52	51	159	55	56	57	225	59	57	60	95
Northern Ireland	22	22	22	87	52	40	45	21	48	37	37	31
Scotland	56	53	57	40	64	63	62	56	66	65	63	44
Wales	43	42	42	24	53	53	55	28	52	54	60	22
UK	48	51	51	310	56	57	57	330	59	58	60	192

Table6: Occupancy Levels by Size: July 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	65	65	65	54	66	75	61	28	58	59	60	1307
Northern Ireland	35	50	55	19	45	47	61	18	58	38	59	13
Scotland	64	66	66	48	65	65	69	41	64	64	63	57
Wales	56	57	61	18	63	70	69	9	55	58	60	110
UK	64	64	65	139	65	73	63	96	59	59	60	1487



Table 7: Occupancy Levels by Size: July 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	56	60	60	159	66	67	69	225	73	73	73	95
Northern Ireland	31	31	28	87	57	46	52	21	63	49	48	31
Scotland	66	64	66	40	73	72	70	56	78	79	77	44
Wales	51	50	48	24	61	63	68	28	60	64	72	22
UK	57	59	60	375	67	67	69	330	73	73	73	192

Table 7: Occupancy Levels by Size: July 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	79	78	54	80	78	80	28	83	84	85	1307
Northern Ireland	66	74	67	19	76	69	77	18	81	77	74	13
Scotland	78	81	82	48	83	83	85	41	85	88	86	57
Wales	73	72	77	18	79	81	77	9	84	88	88	110
UK	79	79	78	139	80	79	81	96	83	84	85	1487



Table 8: Occupancy Levels by Location Types: July 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	70	64	61	177	61	61	62	1020	54	55	57	370	58	59	59	301
Northern Ireland	50	51	50	47	52	39	59	60	30	36	37	48	26	33	28	24
Scotland	69	67	69	39	64	63	63	119	53	57	58	56	66	65	63	72
Wales	63	64	66	30	57	55	57	8	50	58	61	13	47	46	51	54
UK	69	64	62	293	61	61	62	1207	53	55	57	487	58	59	59	451

Table 8: Occupancy Levels by Location Types: July 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	77	74	77	177	83	84	84	1020	76	76	77	370	72	73	74	301
Northern Ireland	72	70	62	47	74	71	73	60	50	45	47	48	42	42	36	24
Scotland	80	78	80	39	83	84	83	119	67	71	72	56	75	75	74	72
Wales	74	76	77	30	77	76	74	8	65	73	77	13	59	58	62	54
UK	77	75	77	293	83	83	83	1207	74	74	76	487	71	72	73	451

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	**	**	**	**	37	41	42	27	48	44	50	83
Northern Ireland	**	**	**	**	11	17	18	24	38	29	34	58
Scotland	**	**	**	**	47	46	55	6	55	55	51	37
Wales	**	**	**	**	40	43	26	4	49	44	42	23
UK	**	**	**	**	38	41	43	61	49	45	49	201

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	58	62	60	115	59	56	60	71	60	60	61	1572
Northern Ireland	47	40	47	34	44	52	52	15	48	41	59	58
Scotland	63	60	64	41	70	70	67	26	66	66	66	176
Wales	43	38	49	16	54	60	63	16	60	63	64	151
UK	58	60	60	206	60	58	61	128	61	61	62	1957

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) July 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	**	**	**	**	50	54	53	27	58	56	60	83
Northern Ireland	**	**	**	**	25	23	27	24	42	35	39	58
Scotland	**	**	**	**	60	51	70	6	66	66	60	37
Wales	**	**	**	**	46	61	36	4	57	55	56	23
UK	**	**	**	**	51	53	54	61	59	57	59	201

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) July 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	71	74	72	115	69	69	73	71	80	81	82	1572
Northern Ireland	60	54	59	34	69	68	66	15	75	72	73	58
Scotland	74	74	75	41	82	80	80	26	82	83	82	176
Wales	64	62	65	16	68	72	77	16	74	76	81	151
UK	71	73	72	206	71	71	74	128	80	81	82	1957

** 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)

