



UNITED KINGDOM OCCUPANCY SURVEY

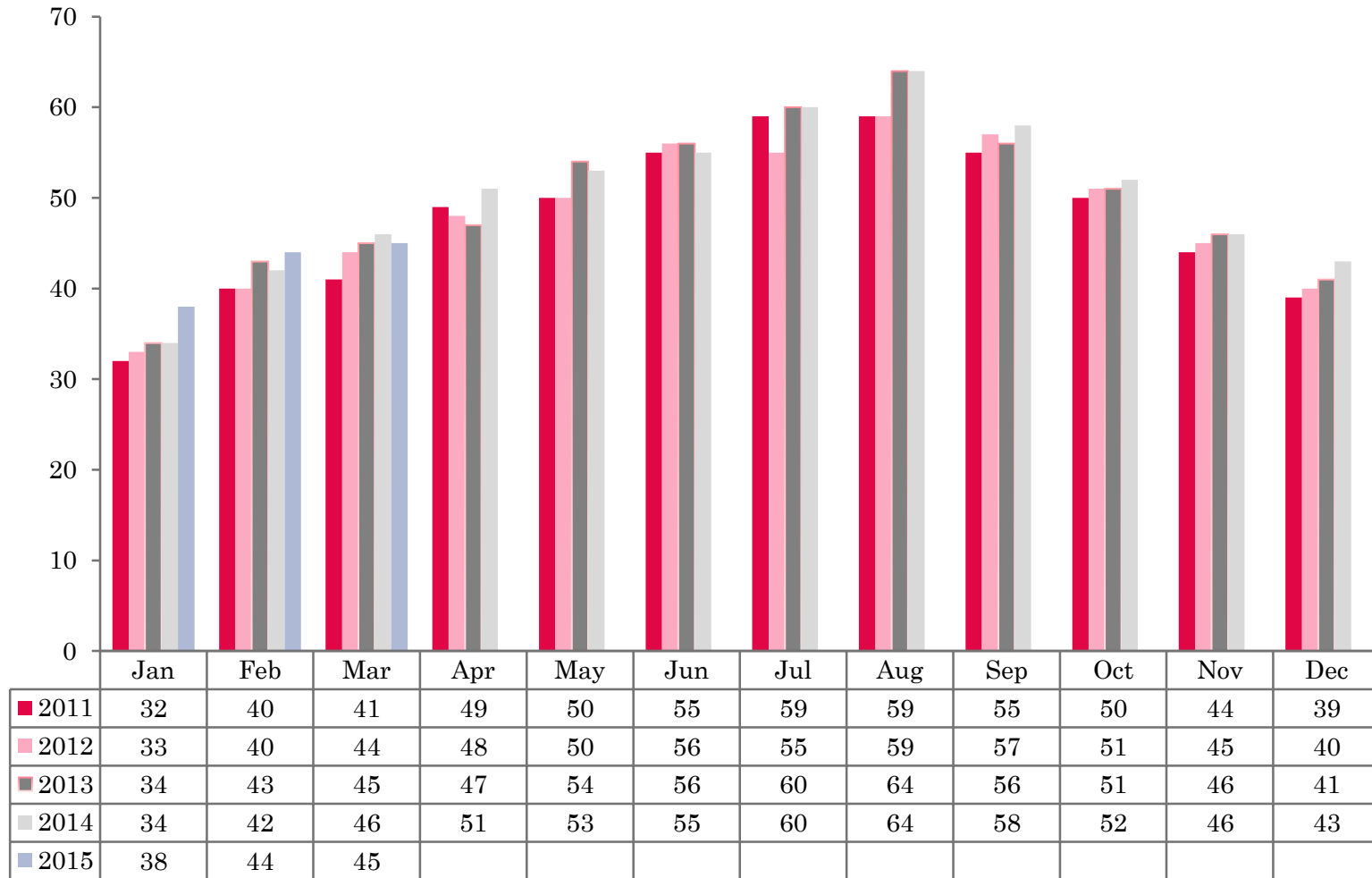
Serviced Accommodation Summary Report
March 2015

UK OCCUPANCY SURVEY

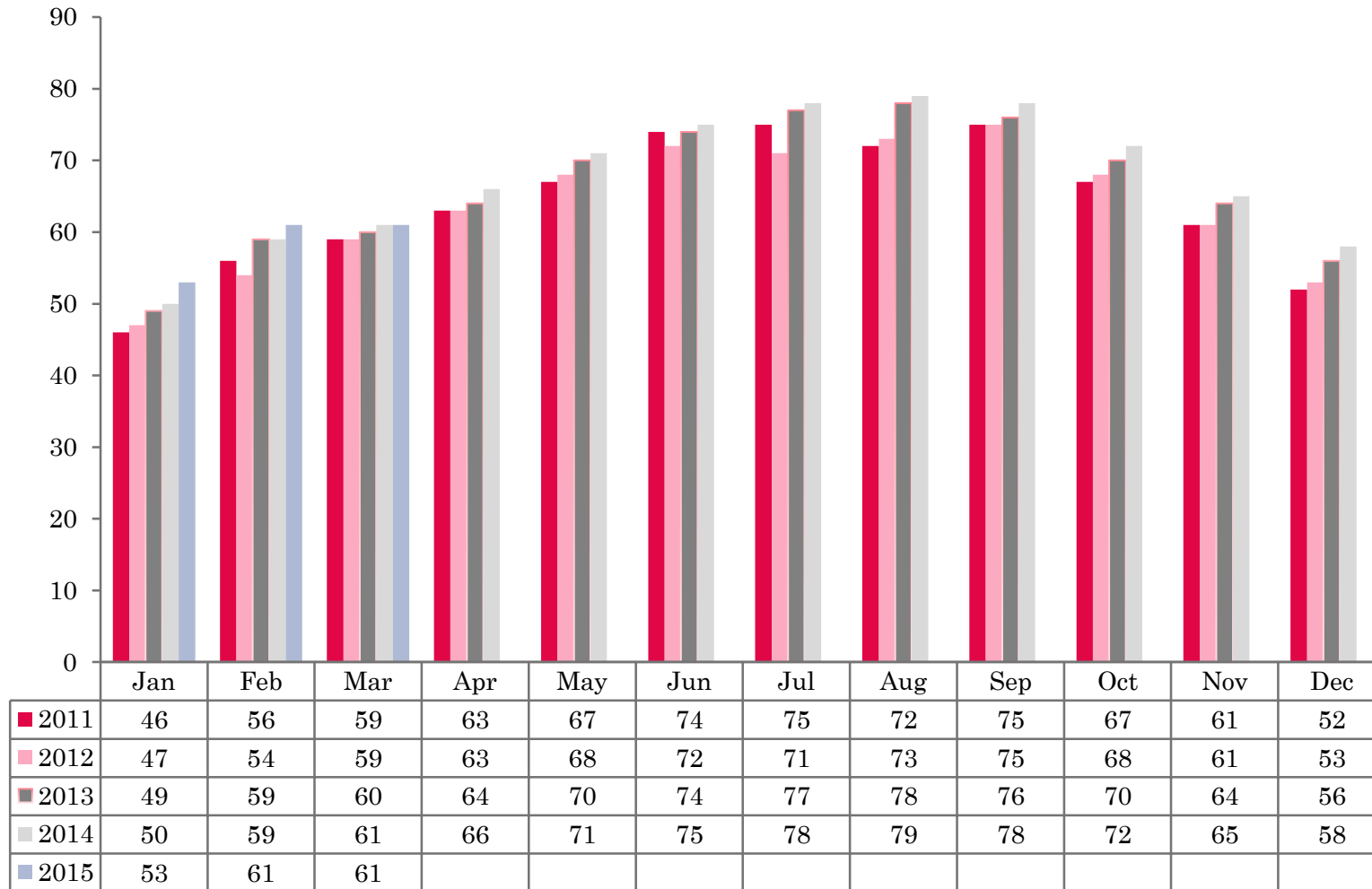
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2011 - 2015



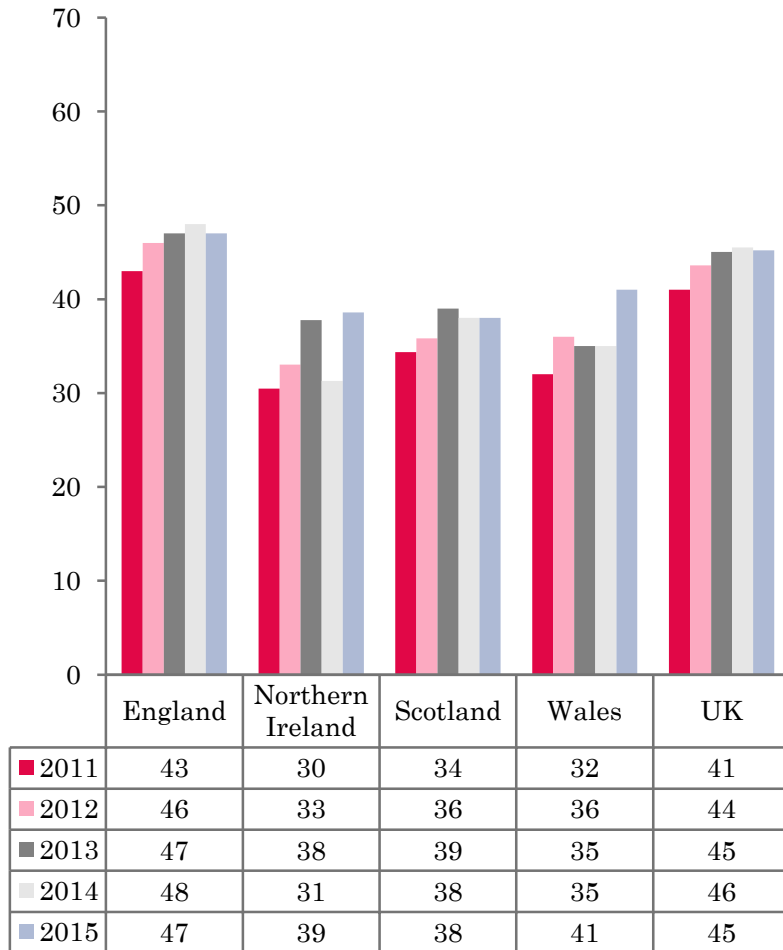
UK BEDROOM OCCUPANCY 2011 - 2015



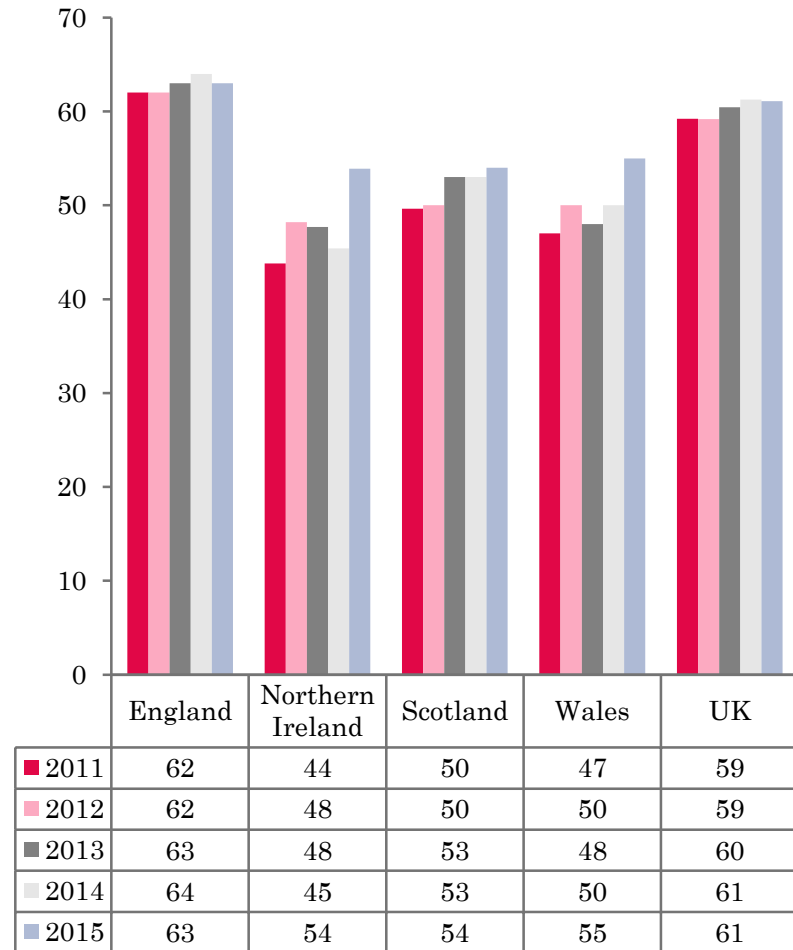
- ❖ 2,547 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (45%) and room occupancy (61%) had both remained static when compared to March 2014.



NATIONAL BEDSPACE OCCUPANCY MARCH 2011-2015



NATIONAL ROOM OCCUPANCY MARCH 2011-2015



- During March 2015 both room and bedspace occupancy had remained static, when compared with the same month in 2014.
- England mirrored the UK, with room and bedspace occupancy both remaining flat (-1%) when compared with March 2014.
- Room occupancy in Northern Ireland increased by a healthy 9% in March 2015 when compared to the same period last year. Bedspace occupancy was also up by a healthy margin, with an increase of 8% on March 2014.
- Wales also witnessed an increase in both room and bedspace occupancy levels during March. Room occupancy was up by 5%, with bedspace occupancy levels rising by 6% when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland remained flat during March 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 7% on March 2014 whilst both England and Wales remained on a par with the same period in 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: March 2013 - 2015

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	47	48	47	63	64	63	1558	1928	1869
Northern Ireland	38	31	39	48	45	54	162	170	198
Scotland	39	38	38	53	53	54	310	292	271
Wales	35	35	41	48	50	55	129	111	209
UK	45	46	45	60	61	61	2159	2501	2547

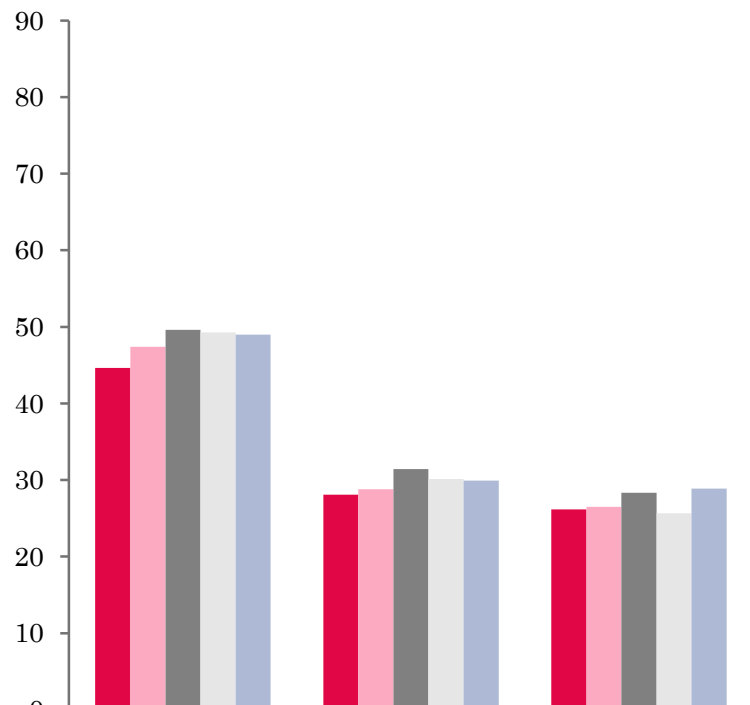
Table 2: UK/Non UK Occupancy Levels March 2013 – 2015 (see note 5a and 5b Slide 19)

	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	34	31	34	5	3	3	11	6	6	14	9	8	1558	1928	1869
Northern Ireland	22	18	18	16	14	21	30	42	32	42	44	54	162	170	198
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	310	292	271
Wales	29	31	31	2	2	1	**	**	**	6	5	3	129	111	209
UK	33	31	33	5	3	3	12	7	7	14	10	9	2159	2501	2547

** FIGURES NOT AVAILABLE

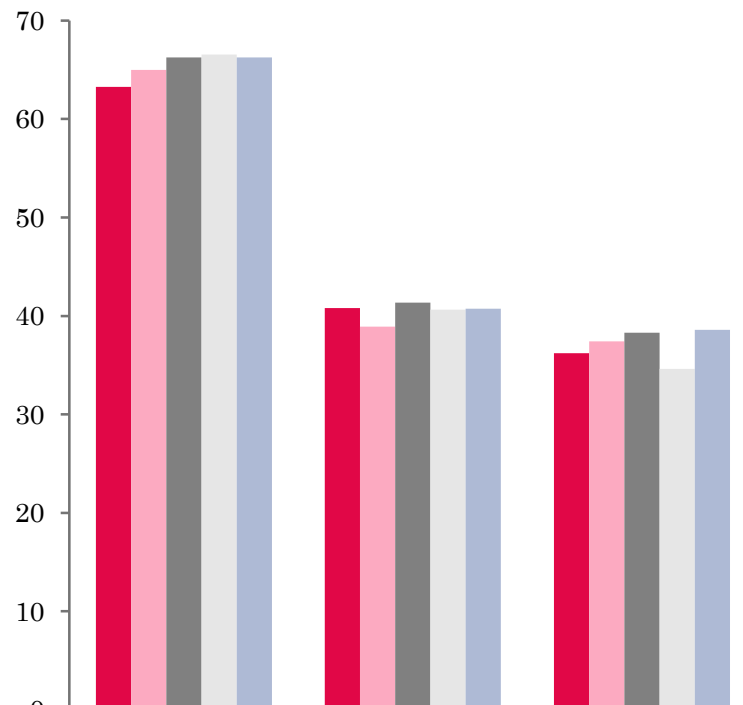


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MARCH 2011-2015



	Hotels	Guesthouses	B&Bs
2011	45	28	26
2012	47	29	27
2013	50	31	28
2014	49	30	26
2015	49	30	29

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



	Hotels	Guesthouses	B&Bs
2011	63	41	36
2012	65	39	37
2013	66	41	38
2014	67	41	35
2015	66	41	39



- Both room and bed occupancy in both the Hotels and Guesthouses remained static during March 2015. The B&B sector fared best with both room and bedspace occupancy increasing when compared to March 2014. Room occupancy levels were up by 4% on 2014 data with bed occupancy up by 3%.
- Occupancy levels in all but one of the size bands had either increased or remained static in both measures of occupancy when compared to March 2014. The biggest movement in bedspace occupancy was in the 4-10 size banding where levels were up 3% on the same period last year. Room occupancy levels in the 51-100 size banding increased by 7% on 2014 data, the largest in room occupancy. Both room and bedspace occupancy levels in the 26-50 size banding fell by 3% and 2% respectively.
- Only city/large town location witnessed a fall in bedspace occupancy during March 2015, down by 3% on 2014 data. Both seaside and countryside/village locations witnessed an increase of 2% compared to 2014, with small town remaining static. Countryside/Village locations witnessed the biggest increase in room occupancy, up by 5% when compared to March 2014. Both Small town and City/Large town went up by 2%, with seaside locations falling by 5%.
- With the exception of the £30.00-£39.99 tariff band, all other bandings witnessed an increase or remained static in both room and bedspace occupancy levels during March. The largest increase in room occupancy was found in the £20.00-£29.99 and £40.00-£49.99 tariff bands, where occupancy levels were up 5% and 4% respectively on 2014 data. The £20.00-£29.99 tariff band was also the biggest mover in bedspace occupancy, where levels had increased by 4% when compared to March 2014.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	51	51	50	68	68	67	995	1464	1467
Northern Ireland	44	39	47	54	54	65	59	79	79
Scotland	46	45	45	62	64	64	220	218	200
Wales	41	40	46	57	57	62	70	65	168
UK	50	49	49	66	67	66	1344	1826	1914
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	34	33	32	45	45	44	222	182	157
Northern Ireland	20	19	16	26	30	25	8	15	23
Scotland	24	21	21	30	25	30	40	33	30
Wales	18	17	21	24	23	28	24	18	21
UK	31	30	30	41	41	41	294	248	231
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	30	28	32	41	38	43	341	282	245
Northern Ireland	13	7	13	22	14	18	95	76	96
Scotland	23	19	18	29	23	23	50	41	41
Wales	24	17	19	30	25	24	35	28	20
UK	28	26	29	38	35	39	521	427	402



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: March 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	50	48	44	44	46	60	68	59	65	58	69
Northern Ireland	43	42	45	32	28	32	55	54	55	52	49	49
Scotland	45	42	42	36	34	36	52	51	52	55	54	57
Wales	40	39	47	29	31	36	50	49	55	46	50	55
UK	49	48	47	42	42	44	58	64	58	62	57	66



Table 5: Non-UK Percentages: March 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	9	8	4	12	5	7	14	10	7	17	7	9
Northern Ireland	27	35	32	34	38	34	41	44	36	49	48	40
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	4	2	7	6	3
UK	9	9	5	13	6	8	14	10	7	17	8	9

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Table 6: Occupancy Levels by Size: March 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	25	21	24	167	30	27	30	219	36	38	38	99
Northern Ireland	8	6	8	84	22	10	17	28	26	28	27	33
Scotland	18	15	14	32	28	26	29	54	40	39	40	39
Wales	17	19	19	23	25	24	26	25	35	38	42	19
UK	23	20	22	306	29	26	29	326	36	38	38	190

Table6: Occupancy Levels by Size: March 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	49	48	45	58	58	56	54	32	51	53	52	1294
Northern Ireland	25	34	42	21	43	40	46	21	49	39	52	11
Scotland	41	46	41	50	53	50	49	40	50	48	50	56
Wales	44	37	42	20	42	46	58	10	47	40	49	112
UK	47	47	44	149	56	54	53	103	51	51	52	1473



Table 7: Occupancy Levels by Size: March 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	33	29	33	167	39	38	42	219	49	53	55	99
Northern Ireland	15	11	12	84	28	16	24	28	39	38	38	33
Scotland	24	21	19	32	35	31	36	54	51	54	53	39
Wales	23	23	22	23	31	31	34	25	45	51	50	19
UK	31	27	30	375	38	36	40	326	49	53	54	190

Table 7: Occupancy Levels by Size: March 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	65	64	62	58	70	60	68	32	73	75	75	1294
Northern Ireland	41	52	55	21	61	56	62	21	54	56	75	11
Scotland	56	65	60	50	70	68	70	40	71	73	74	56
Wales	59	54	59	20	57	63	65	10	73	68	73	112
UK	63	63	61	149	69	61	68	103	72	74	75	1473



Table 8: Occupancy Levels by Location Types: March 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	39	37	39	173	54	57	52	1012	43	41	42	377	40	36	39	307
Northern Ireland	29	25	27	50	45	39	51	60	25	24	22	54	15	12	14	34
Scotland	39	37	39	31	48	46	49	112	31	29	31	55	31	30	28	73
Wales	39	40	42	29	45	38	42	9	36	37	38	13	25	27	31	50
UK	39	37	39	283	52	54	51	1193	41	39	40	499	37	34	36	464

Table 8: Occupancy Levels by Location Types: March 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	50	49	43	173	71	73	74	1012	60	59	62	377	52	48	53	307
Northern Ireland	37	31	36	50	54	54	69	60	37	35	30	54	27	21	26	34
Scotland	46	49	51	31	68	67	70	112	46	44	46	55	39	36	38	73
Wales	49	51	51	29	69	66	59	9	50	49	50	13	33	39	41	50
UK	49	49	44	283	70	71	73	1193	57	56	58	499	49	45	50	464

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	12	18	24	23	21	19	87
Northern Ireland	**	**	**	**	6	3	9	32	10	8	16	54
Scotland	**	**	**	**	31	25	16	9	25	18	21	36
Wales	**	**	**	**	10	5	16	5	24	21	25	21
UK	**	**	**	**	22	13	17	70	23	20	20	198

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	33	31	33	122	37	38	37	72	50	51	49	1566
Northern Ireland	19	27	26	38	35	36	51	15	45	37	47	59
Scotland	27	28	32	34	46	44	43	29	47	45	45	163
Wales	28	25	26	15	38	39	36	18	42	40	46	150
UK	32	30	32	209	38	39	38	134	49	49	48	1938

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	**	**	**	**	33	23	30	24	30	32	28	87
Northern Ireland	**	**	**	**	7	5	12	32	19	11	22	54
Scotland	**	**	**	**	35	34	18	9	34	27	31	36
Wales	**	**	**	**	15	9	24	5	30	29	32	21
UK	**	**	**	**	32	23	28	70	30	31	29	198

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	43	41	45	122	45	49	50	72	68	68	69	1566
Northern Ireland	28	40	39	38	53	44	67	15	53	55	64	59
Scotland	38	41	46	34	58	60	61	29	64	63	63	163
Wales	43	44	46	15	47	52	41	18	59	58	62	150
UK	42	41	45	209	47	51	52	134	67	66	68	1938

** 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)

