



# UNITED KINGDOM OCCUPANCY SURVEY

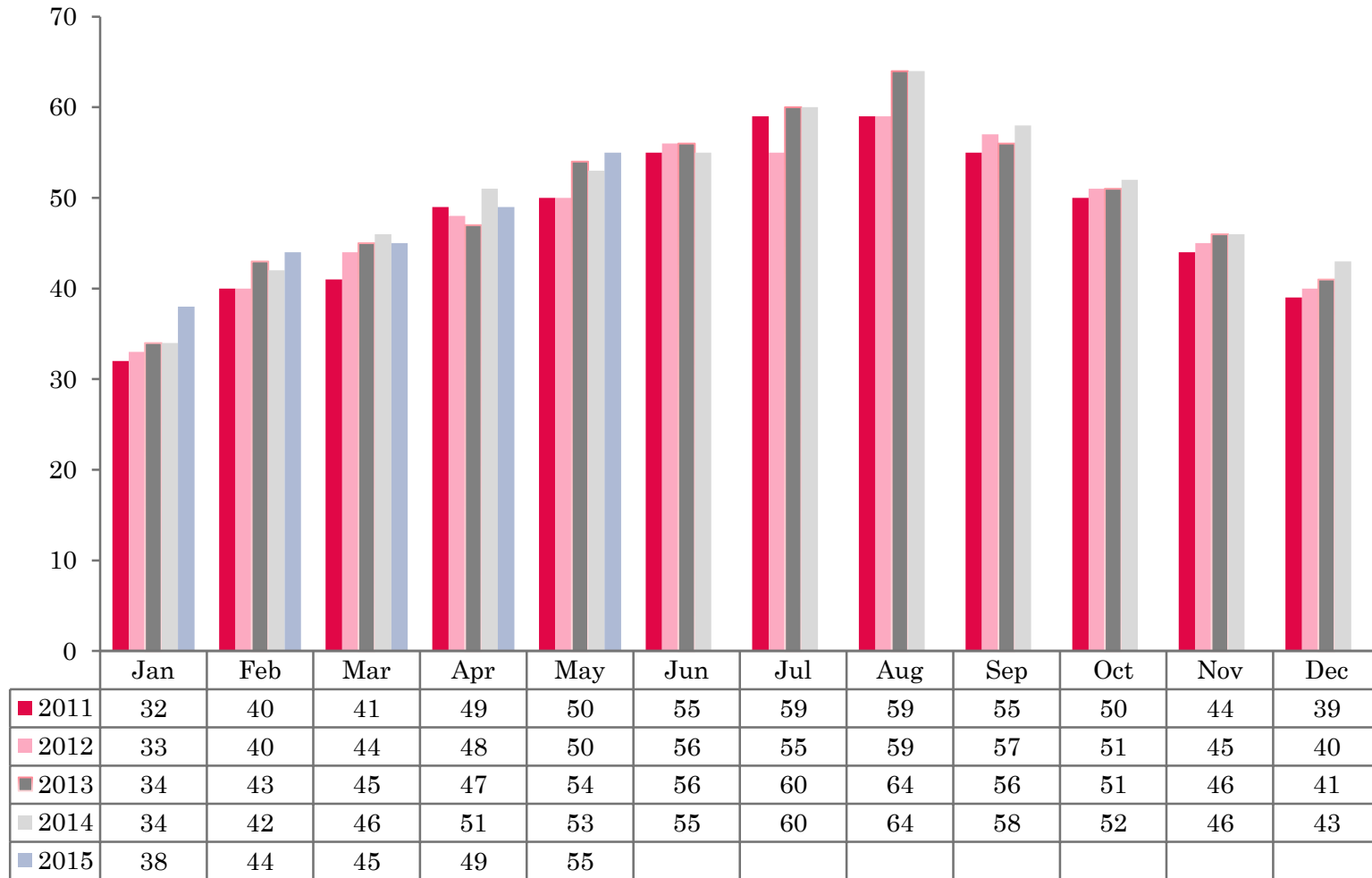
Serviced Accommodation Summary Report  
May 2015

# 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



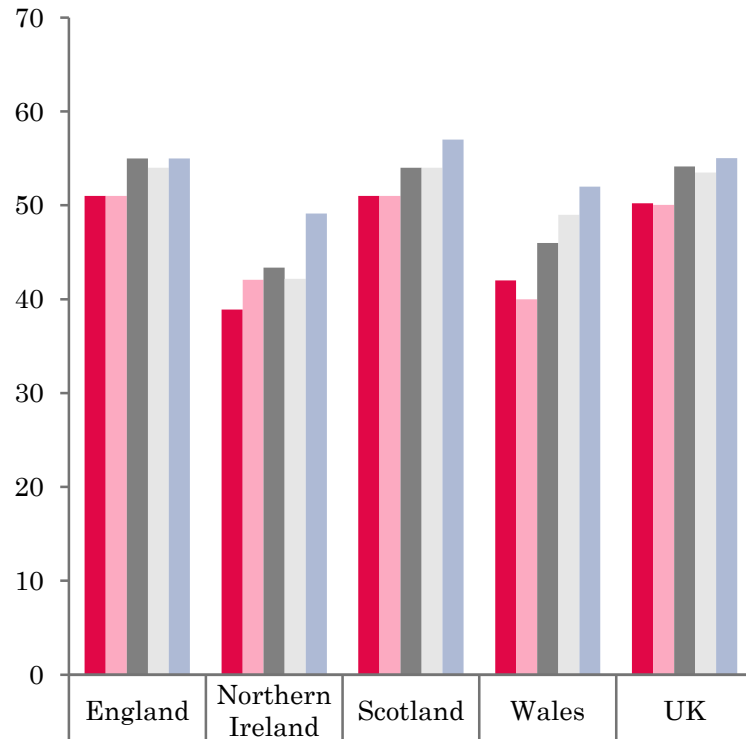
# UK BEDROOM OCCUPANCY 2011 - 2015



- ❖ 2,553 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 (55%) had increased when compared to May 2014. Room occupancy remained at the same level as the previous year (72%).



## NATIONAL BEDSPACE OCCUPANCY MAY 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	51	39	51	42	50
2012	51	42	51	40	50
2013	55	43	54	46	54
2014	54	42	54	49	53
2015	55	49	57	52	55

## NATIONAL ROOM OCCUPANCY MAY 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	68	55	67	57	67
2012	69	62	67	55	68
2013	71	61	70	61	70
2014	72	62	70	64	71
2015	72	65	72	66	72



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

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	55	54	55	71	72	72	1520	1951	1868
Northern Ireland	43	42	49	61	62	65	165	172	192
Scotland	54	54	57	70	70	72	324	293	283
Wales	46	49	52	61	64	66	142	121	210
<b>UK</b>	54	53	55	70	71	72	2151	2537	2553

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

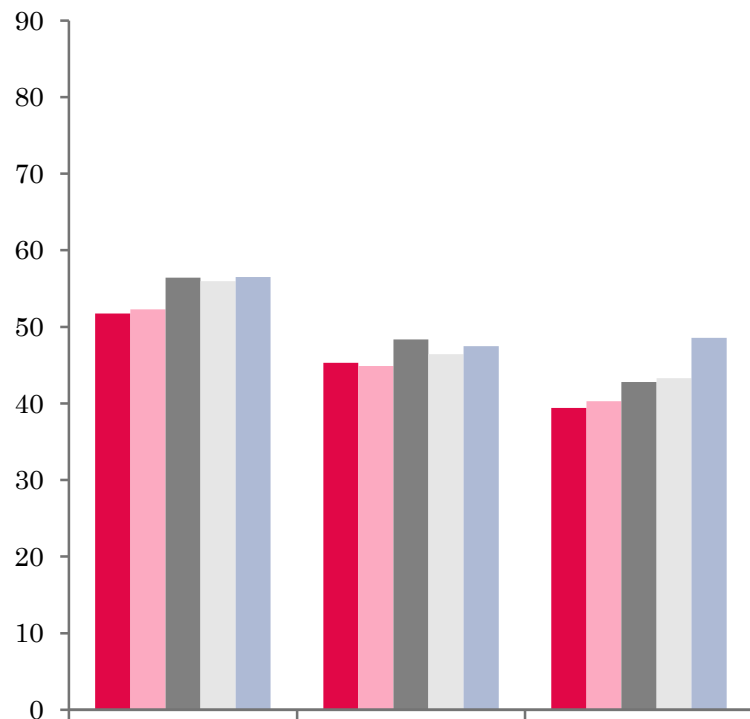
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	43	41	44	7	7	5	13	11	10	14	14	11	1520	1951	1868
Northern Ireland	22	22	22	21	20	27	39	45	46	48	48	56	165	172	192
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	324	293	283
Wales	42	42	45	3	5	4	**	**	**	8	10	8	142	121	210
<b>UK</b>	42	41	44	7	7	5	14	12	11	14	15	12	2151	2537	2553

\*\* FIGURES NOT AVAILABLE



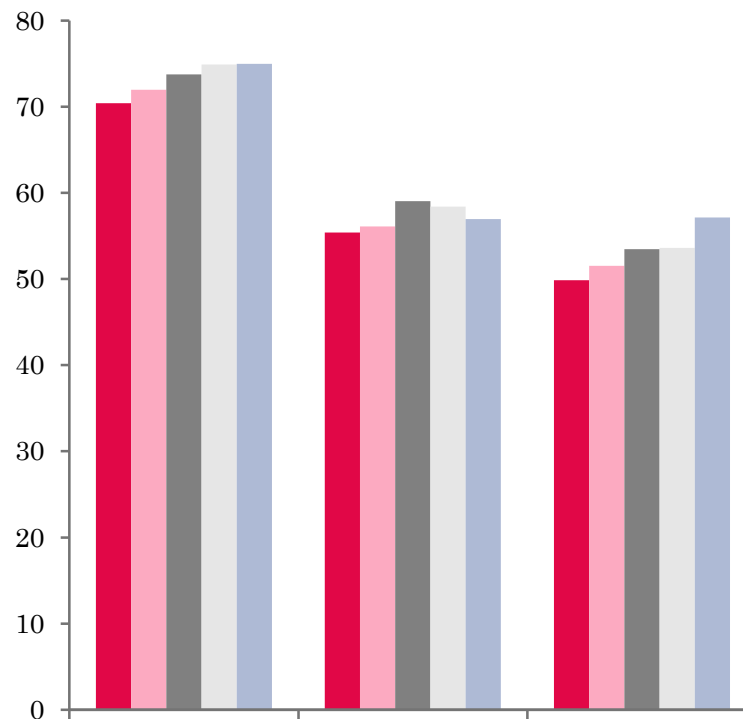


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MAY 2011-2015



	Hotels	Guesthouses	B&Bs
2011	52	45	39
2012	52	45	40
2013	56	48	43
2014	56	46	43
2015	56	47	49

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



	Hotels	Guesthouses	B&Bs
2011	70	55	50
2012	72	56	52
2013	74	59	53
2014	75	58	54
2015	75	57	57



- Room and bedspace occupancy in both the Hotel and Guesthouse sector remained static during May 2015. Bed occupancy in the B&B sector, increased by 6% when compared to May 2014, with room occupancy up 3% when compared with the same period the previous year.
- Occupancy levels in all of the size bands had either increased or had remained static in bedspace occupancy when compared to May 2014. The largest of these was found in the 1-3 and 11-25 size banding where levels rose by 3% respectively. Room occupancy levels in the 1-3 size banding increased by 5% on 2014 data. With the exception of the 51-100 size banding which fell by 3%, all other size bandings remained static when compared to 2014 data.
- Three out of the four locations remained static in bedspace occupancy during May 2015. The countryside/village locations witnessed the only increase of 2% compared to 2014. None of the locations saw an increase in room occupancy during May 2015, with seaside, small town and countryside locations remaining static with 2014. City/large town witnessed a 2% drop in room occupancy levels.
- All tariff bandings either witnessed an increase or remained static in bedspace occupancy levels during May. The £20.00-£29.99, £40.00-£49.99 and >£60.00 tariff bands all increased by 2% when compared to May 2014. Only the £40.00-£49.99 tariff band increased in room occupancy in May 2015, up by 2% on last years data. All other tariff bands either remained static or fell slightly.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	57	56	56	74	75	75	966	1476	1463
Northern Ireland	48	49	58	69	72	76	60	74	82
Scotland	57	57	59	75	76	76	218	208	197
Wales	49	55	56	68	71	71	71	64	167
<b>UK</b>	56	56	56	74	75	75	1315	1822	1909
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	49	47	48	60	60	58	216	189	156
Northern Ireland	38	33	24	52	45	33	18	21	16
Scotland	51	49	51	61	57	59	46	38	34
Wales	35	36	39	42	44	45	28	24	21
<b>UK</b>	48	46	47	59	58	57	308	272	227
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	43	44	49	54	55	58	338	286	249
Northern Ireland	25	20	27	34	28	32	87	77	94
Scotland	45	47	54	56	56	62	60	47	52
Wales	40	31	35	46	36	40	43	33	23
<b>UK</b>	43	43	49	53	54	57	528	443	418



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: May 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	60	59	58	49	50	51	71	71	71	70	72	72
Northern Ireland	44	50	54	33	36	40	55	65	66	50	57	58
Scotland	60	58	61	51	50	53	71	69	71	70	71	73
Wales	55	56	59	38	41	46	67	68	68	56	60	63
<b>UK</b>	59	58	58	48	49	51	70	70	71	69	71	71



**Table 5: Non-UK Percentages: May 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	10	9	8	16	14	12	13	12	10	17	15	12
Northern Ireland	34	38	40	44	47	47	37	41	44	46	50	51
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	6	8	7	10	11	9
<b>UK</b>	11	10	9	17	15	13	13	12	11	17	16	13

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: May 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	41	39	41	165	45	45	46	228	45	49	52	92
Northern Ireland	19	19	18	85	38	30	29	17	34	36	40	34
Scotland	40	38	46	43	54	54	58	54	56	58	58	41
Wales	38	35	38	23	40	42	41	29	47	49	56	21
<b>UK</b>	40	38	41	316	46	46	47	328	47	50	53	188

**Table6: Occupancy Levels by Size: May 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	58	58	59	56	56	53	50	30	57	58	58	1297
Northern Ireland	38	42	56	23	45	53	56	21	55	49	63	12
Scotland	55	54	58	45	60	57	61	41	58	58	57	59
Wales	53	50	55	18	50	69	66	9	47	55	56	113
<b>UK</b>	57	57	59	142	56	54	53	101	57	58	58	1481



**Table 7: Occupancy Levels by Size: May 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	49	47	51	165	56	56	57	228	60	64	64	92
Northern Ireland	26	24	23	85	46	39	34	17	51	44	53	34
Scotland	51	45	55	43	63	64	66	54	69	72	72	41
Wales	43	42	44	23	50	50	49	29	58	60	63	21
<b>UK</b>	49	46	51	375	57	57	57	328	61	65	65	188

**Table 7: Occupancy Levels by Size: May 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	74	73	70	56	72	71	67	30	79	80	80	1297
Northern Ireland	62	66	67	23	68	71	74	21	74	81	84	12
Scotland	72	73	75	45	79	76	78	41	81	83	81	59
Wales	70	65	69	18	70	77	74	9	73	83	79	113
<b>UK</b>	73	72	71	142	73	72	69	101	79	81	80	1481



**Table 8: Occupancy Levels by Location Types: May 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	54	48	48	180	59	60	60	1011	48	49	50	373	52	51	52	304
Northern Ireland	42	41	42	47	50	49	61	62	30	35	32	49	25	19	22	34
Scotland	58	52	58	35	58	57	59	114	44	50	49	56	53	53	57	78
Wales	53	56	57	30	48	44	46	8	43	56	56	13	40	42	44	53
<b>UK</b>	54	49	50	292	58	58	59	1195	47	49	50	491	51	50	52	469

**Table 8: Occupancy Levels by Location Types: May 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	62	65	64	180	78	81	79	1011	67	68	69	373	65	64	65	304
Northern Ireland	55	53	53	47	71	74	78	62	41	46	42	49	38	33	33	34
Scotland	70	64	72	35	79	79	79	114	59	65	65	56	64	63	67	78
Wales	65	66	65	30	69	78	65	8	67	67	70	13	51	53	53	53
<b>UK</b>	63	65	65	292	78	80	78	1195	65	67	68	491	64	63	64	469



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	**	**	**	**	29	30	33	28	30	37	39	86
Northern Ireland	**	**	**	**	18	11	19	24	29	25	20	54
Scotland	**	**	**	**	39	32	40	4	40	45	44	42
Wales	**	**	**	**	34	30	20	3	38	33	36	24
<b>UK</b>	**	**	**	**	31	30	32	59	32	38	39	206

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	49	46	48	118	51	50	49	70	56	56	57	1566
Northern Ireland	33	38	42	37	43	48	56	16	49	48	59	61
Scotland	53	46	51	41	60	57	61	29	59	58	61	167
Wales	40	42	40	16	53	62	54	16	50	56	57	152
<b>UK</b>	49	46	48	212	52	52	51	131	56	56	58	1946

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	**	**	**	**	44	44	42	28	41	49	48	86
Northern Ireland	**	**	**	**	26	13	22	24	35	31	25	54
Scotland	**	**	**	**	54	41	48	4	53	56	55	42
Wales	**	**	**	**	41	41	30	3	47	39	45	24
<b>UK</b>	**	**	**	**	45	43	41	59	43	49	48	206

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	59	57	60	118	61	60	61	70	75	75	75	1566
Northern Ireland	47	52	58	37	59	65	70	16	70	74	76	61
Scotland	66	61	63	41	76	74	76	29	77	76	77	167
Wales	57	60	57	16	67	67	65	16	68	72	72	152
<b>UK</b>	60	58	60	212	64	63	64	131	75	75	75	1946

\*\* 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)

