



# UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Summary Report  
November 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



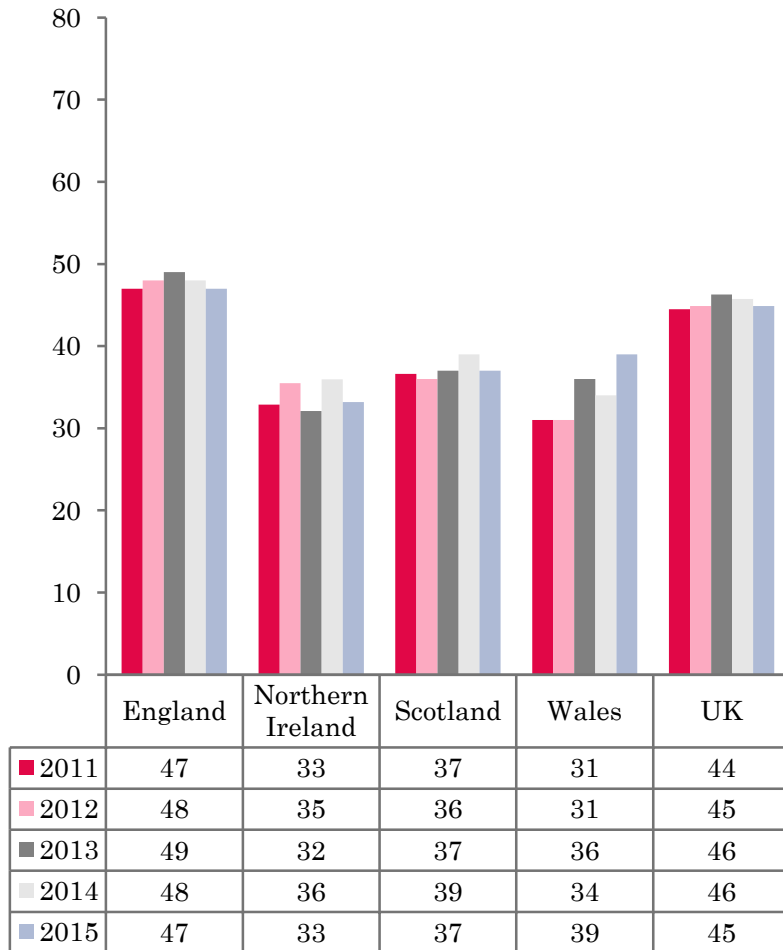
# UK BEDROOM OCCUPANCY 2011 - 2015



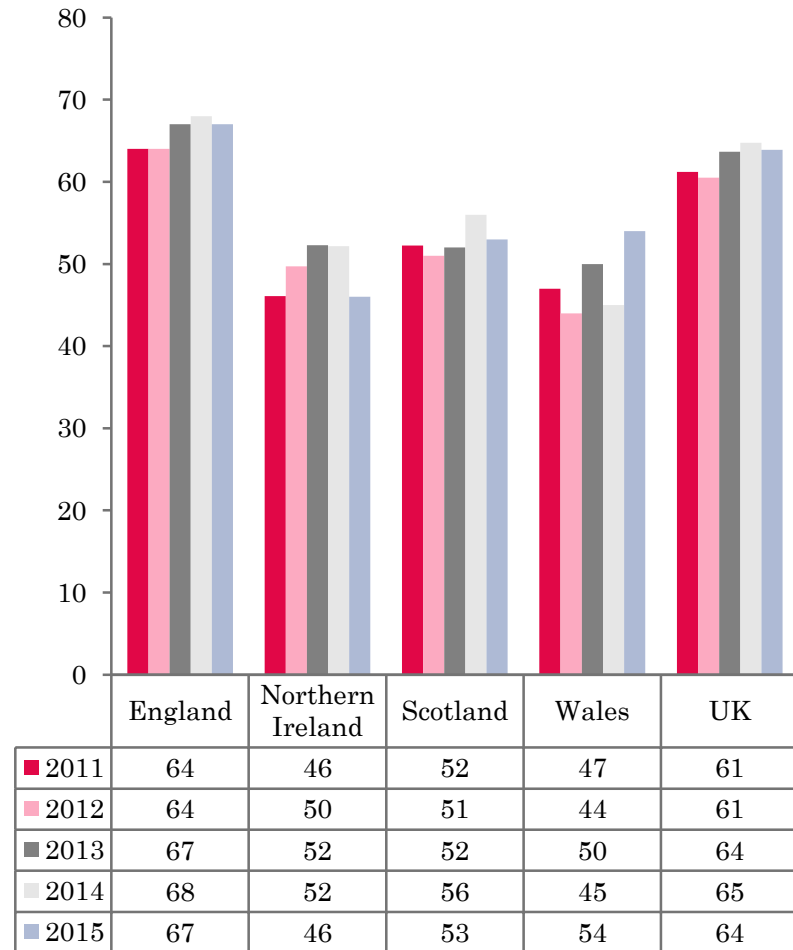
- ❖ 2,393 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ Both UK bedspace (45%) and UK room (64%) occupancy levels had remained flat (-1%) when compared to the same period the previous year.



## NATIONAL BEDSPACE OCCUPANCY NOVEMBER 2011-2015



## NATIONAL ROOM OCCUPANCY NOVEMBER 2011-2015



- During November 2015 both UK bedspace occupancy and room occupancy remained flat when compared with the same month in 2014.
- England occupancy levels mirrored that of the UK, with bedspace and room occupancy levels remaining flat at 47% and 67% (-1% respectively), when compared with November 2014.
- There was a fall in both room and bedspace occupancy levels in Northern Ireland during November 2015. Room occupancy fell by 6% and bedspace occupancy was down by 3% when compared to the same period in 2014.
- This was not the case for Wales where bedspace occupancy levels increased by 5% during November when compared to the same period in 2014. A significant rise was seen in room occupancy which rose by 9%, up from 45% to 54%, when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland decreased during November 2015. Bedspace occupancy fell by 2% and room occupancy by 3% when compared to November 2014.
- Across the UK as a whole, bedspace occupancy by non-UK residents had increased by 2% when compared with the previous year. England mirrored the UK with a rise of 2%. Both Northern Ireland and Wales remained on a par with November 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: November 2013 - 2015**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	49	48	47	67	68	67	1925	1836	1777
Northern Ireland	32	36	33	52	52	46	155	162	166
Scotland	37	39	37	52	56	53	292	271	254
Wales	36	34	39	50	45	54	130	101	196
<b>UK</b>	46	46	45	64	65	64	2502	2370	2393

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

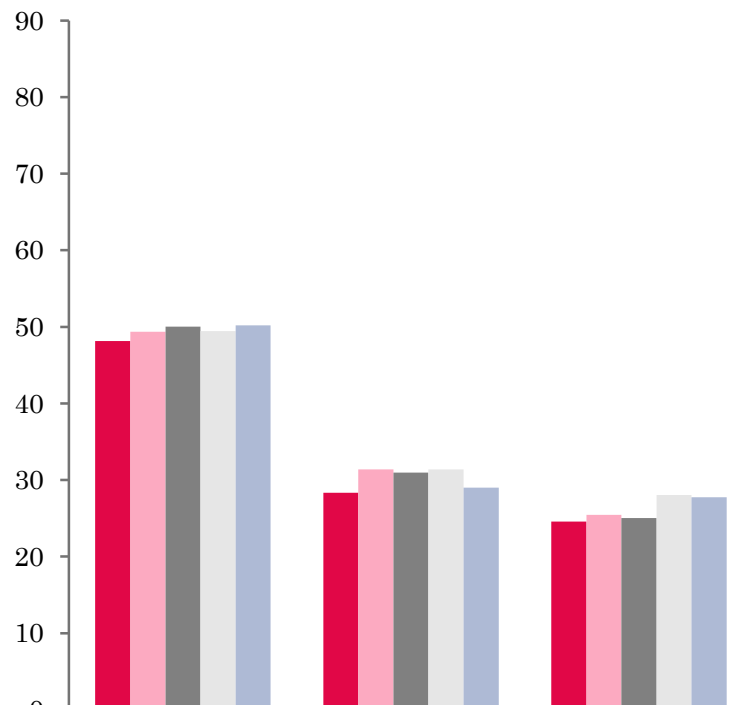
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	32	33	31	3	2	4	6	5	6	8	6	10	1925	1836	1777
Northern Ireland	13	20	16	19	16	17	68	36	34	59	44	51	155	162	166
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	292	271	254
Wales	29	29	30	1	1	1	**	**	**	3	3	4	130	101	196
<b>UK</b>	31	32	31	3	2	4	8	6	7	9	7	11	2502	2370	2393

\*\* FIGURES NOT AVAILABLE



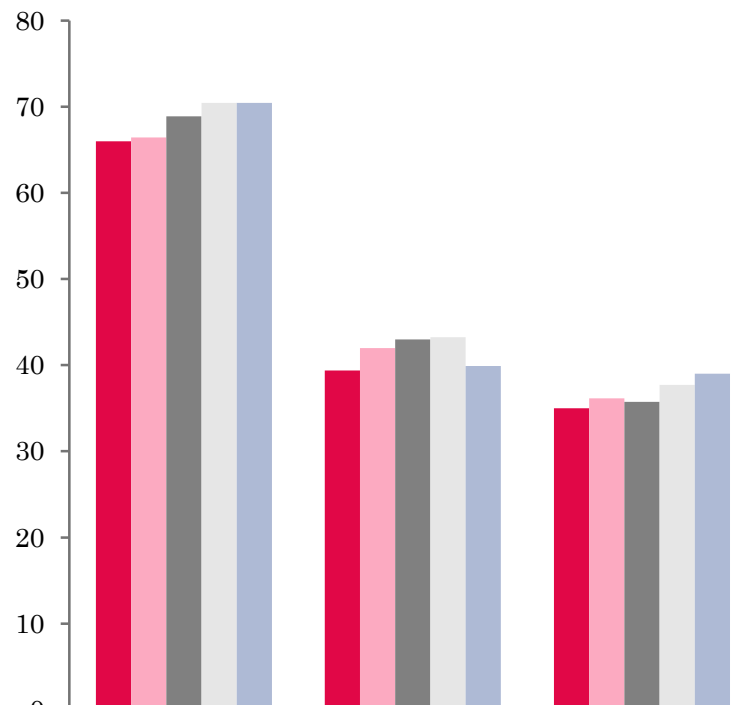


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION NOVEMBER 2011-2015



	Hotels	Guesthouses	B&Bs
2011	48	28	25
2012	49	31	25
2013	50	31	25
2014	49	31	28
2015	50	29	28

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



	Hotels	Guesthouses	B&Bs
2011	66	39	35
2012	66	42	36
2013	69	43	36
2014	70	43	38
2015	70	40	39



- Both bed and room occupancy levels across hotel and B&B's establishment types remained flat during November 2015. Guesthouses witnessed a drop in both measures of occupancy, down by 3% in room occupancy and 2% in bedspace occupancy when compared to November 2014.
- At the UK level, bed occupancy levels in four out of the six size bands had remained flat when compared to the same month in 2014. A decrease in bed occupancy levels was found in the 26-50 and >100 size bandings, where occupancy was down by 3% and 2% respectively when compared to November 2014. Room occupancy mirrored that of bedspace occupancy with four out of the six size bandings remaining on a par with November 2014. Both the 1-3 and 26-50 size bandings fell by 2% respectively when compared to the same period in 2014.
- City/Large Town locations witnessed a fall of 4% in bedspace occupancy when compared with the same month in 2014. Seaside locations bedspace occupancy remained the same as November 2014, whilst both Small Town (-1%) and Countryside/Village (+1%) locations remained fairly flat. The only location to see an increase in room occupancy during this month, was Countryside/Village (up by 2%) when compared to the same period in 2014. City/Large town fell by 3%, small town remained the same as November 2014 (59%) and Seaside locations remained flat (+1%) during November 2015.
- Across all tariff bands, bedspace occupancy remained flat or decreased during November 2015. The £30.00-£39.99 and £50.00-£59.99 tariff bands fell by 2% respectively when compared with the same month in 2014. The £20.00-£29.99, £40.00-£49.99 and >£60.00 bandings remained on a par with November 2014. Room occupancy levels in the £30.00-£39.99 tariff band was down by 7% and the £20.00-£29.99 down aslo witnessed a decrease of 2%. The three remaining tariff bands all remained flat when compared with the same month in 2014.

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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	52	51	50	71	73	71	1471	1438	1447
Northern Ireland	38	43	41	61	62	56	70	76	77
Scotland	44	45	55	62	64	73	211	207	207
Wales	42	41	44	59	53	61	70	61	165
<b>UK</b>	50	49	50	69	70	70	1822	1782	1896
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	34	33	32	47	46	44	172	149	119
Northern Ireland	29	22	17	42	30	26	12	18	15
Scotland	20	29	19	29	37	26	34	28	22
Wales	16	17	16	21	24	22	22	18	14
<b>UK</b>	31	31	29	43	43	40	240	213	170
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	27	32	31	39	43	44	282	249	211
Northern Ireland	8	10	11	19	16	15	73	68	74
Scotland	19	14	16	25	20	22	47	36	29
Wales	19	14	18	23	15	20	38	22	17
<b>UK</b>	25	28	28	36	38	39	440	375	331



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: November 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	52	51	49	45	46	45	64	64	62	70	71	70
Northern Ireland	34	46	38	20	32	24	52	59	47	42	53	38
Scotland	41	42	52	34	36	47	50	53	63	55	59	68
Wales	40	40	44	32	27	36	49	46	52	51	42	56
<b>UK</b>	49	49	49	42	43	44	61	61	61	66	67	68



**Table 35: Non-UK Percentages: November 2013 – 2015 (see notes 5a & 5b Slide 19)**

	Percentage of Non-UK Guests %						4Percentage of Non-UK Bednights 3%					
	Weekend			Weekday			Weekend4			Weekday		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	5	4	5	7	5	7	7	5	4	5	7	5
Northern Ireland	36	32	29	39	40	36	34	36	32	29	39	40
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	2	3	4	3	4
<b>UK</b>	6	5	6	8	6	8	7	7	9	10	8	12

**\*\* FIGURES NOT AVAILABLE**

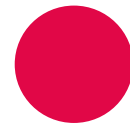


**Table 6: Occupancy Levels by Size: November 2013 - 2015**

<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	24	25	23	139	30	29	29	181	41	40	40	77
Northern Ireland	8	9	9	59	17	14	13	22	24	23	22	2228
Scotland	15	12	13	21	25	28	24	41	34	39	34	43
Wales	15	16	17	17	24	24	24	24	39	41	43	19
<b>UK</b>	22	22	21	236	29	28	28	268	40	40	39	2367

**Table6: Occupancy Levels by Size: November 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	48	49	46	49	47	42	42	30	54	55	53	1289
Northern Ireland	24	39	32	22	36	42	38	22	45	50	48	16
Scotland	38	39	39	48	52	50	48	43	51	54	51	58
Wales	39	37	35	18	43	54	56	10	51	40	48	108
<b>UK</b>	46	47	44	137	47	44	43	105	53	54	52	1471



**Table 7: Occupancy Levels by Size: November 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	33	35	33	139	41	41	42	181	57	57	57	77
Northern Ireland	14	14	12	59	34	21	18	22	33	32	31	2228
Scotland	23	20	18	21	33	36	32	41	45	51	47	43
Wales	20	17	19	17	29	31	31	24	51	52	54	19
<b>UK</b>	30	32	30	375	39	39	39	268	54	55	55	2367

**Table 7: Occupancy Levels by Size: November 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	66	67	65	49	66	63	62	30	78	79	78	1289
Northern Ireland	48	50	44	22	58	61	53	22	71	75	66	16
Scotland	57	57	55	48	73	71	69	43	74	78	78	58
Wales	58	50	52	18	61	60	65	10	73	56	73	108
<b>UK</b>	64	64	62	137	67	64	63	105	77	78	77	1471



**Table 8: Occupancy Levels by Location Type: November 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	42	36	37	153	57	57	54	1009	43	43	42	357	37	36	37	258
Northern Ireland	24	25	20	40	40	46	44	60	21	19	18	44	11	17	15	22
Scotland	29	35	32	28	51	52	48	120	27	28	25	47	25	28	27	59
Wales	37	40	41	26	51	47	45	7	28	33	32	13	27	27	29	45
<b>UK</b>	40	36	36	247	55	56	52	1196	39	40	39	461	34	34	35	384

**Table 8: Occupancy Levels by Location Type: November 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	55	53	55	153	79	80	77	1009	64	63	64	357	51	50	52	258
Northern Ireland	33	34	26	40	65	66	60	60	33	28	24	44	21	27	23	22
Scotland	38	49	47	28	72	76	70	120	42	46	42	47	34	37	37	59
Wales	48	48	51	26	74	58	62	7	43	46	44	13	37	36	40	45
<b>UK</b>	52	52	53	247	77	78	75	1196	59	59	59	461	47	47	49	384



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	**	**	**	**	23	25	25	23	21	21	19	66
Northern Ireland	**	**	**	**	7	13	12	15	9	13	8	46
Scotland	**	**	**	**	21	16	15	6	21	24	18	29
Wales	**	**	**	**	10	8	11	4	21	22	18	14
<b>UK</b>	**	**	**	**	22	23	23	48	21	21	19	155

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	32	30	28	96	39	38	37	66	51	51	50	1494
Northern Ireland	42	21	26	32	34	48	27	13	35	40	42	50
Scotland	28	27	26	31	44	42	42	28	45	47	44	159
Wales	27	18	26	14	39	42	37	16	42	40	46	148
<b>UK</b>	31	29	28	173	40	39	37	123	49	50	49	1851

\*\* FIGURES NOT AVAILABLE



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	**	**	**	**	32	37	34	23	31	36	29	66
Northern Ireland	**	**	**	**	24	15	15	15	14	18	12	46
Scotland	**	**	**	**	32	19	21	6	33	35	26	29
Wales	**	**	**	**	16	13	18	4	27	27	24	14
<b>UK</b>	**	**	**	**	31	33	31	48	31	35	28	155

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	42	41	41	96	54	50	50	66	71	73	71	1494
Northern Ireland	58	32	37	32	63	68	38	13	57	59	58	50
Scotland	42	43	41	31	64	61	61	28	62	65	62	159
Wales	37	41	46	14	52	51	49	16	60	51	62	148
<b>UK</b>	42	41	41	173	56	52	51	123	69	70	69	1851

\*\* 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 2015 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 2015) 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)

