



# UNITED KINGDOM OCCUPANCY SURVEY

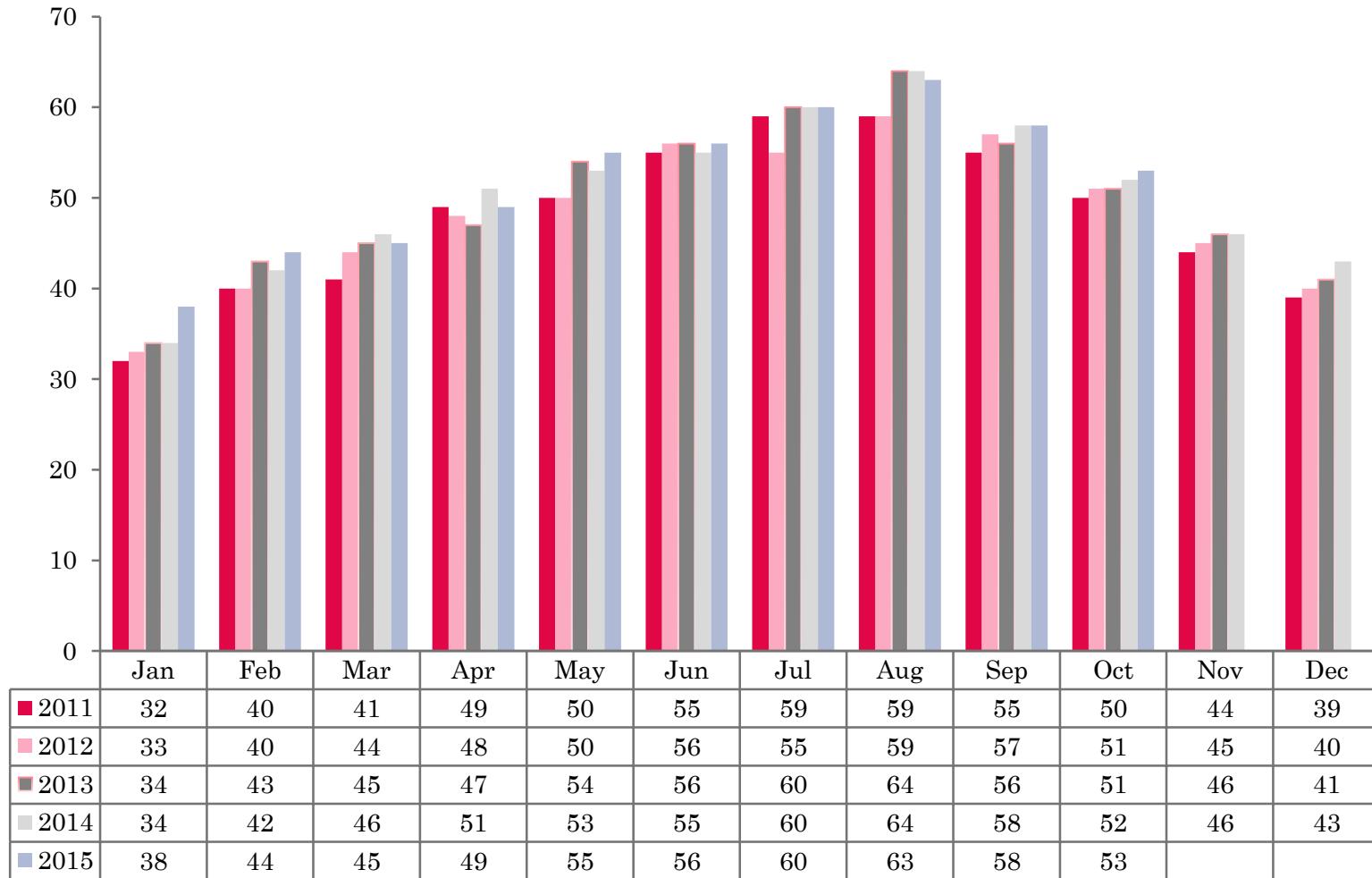
Serviced Accommodation Summary Report  
October 2015

# UK OCCUPANCY SURVEY

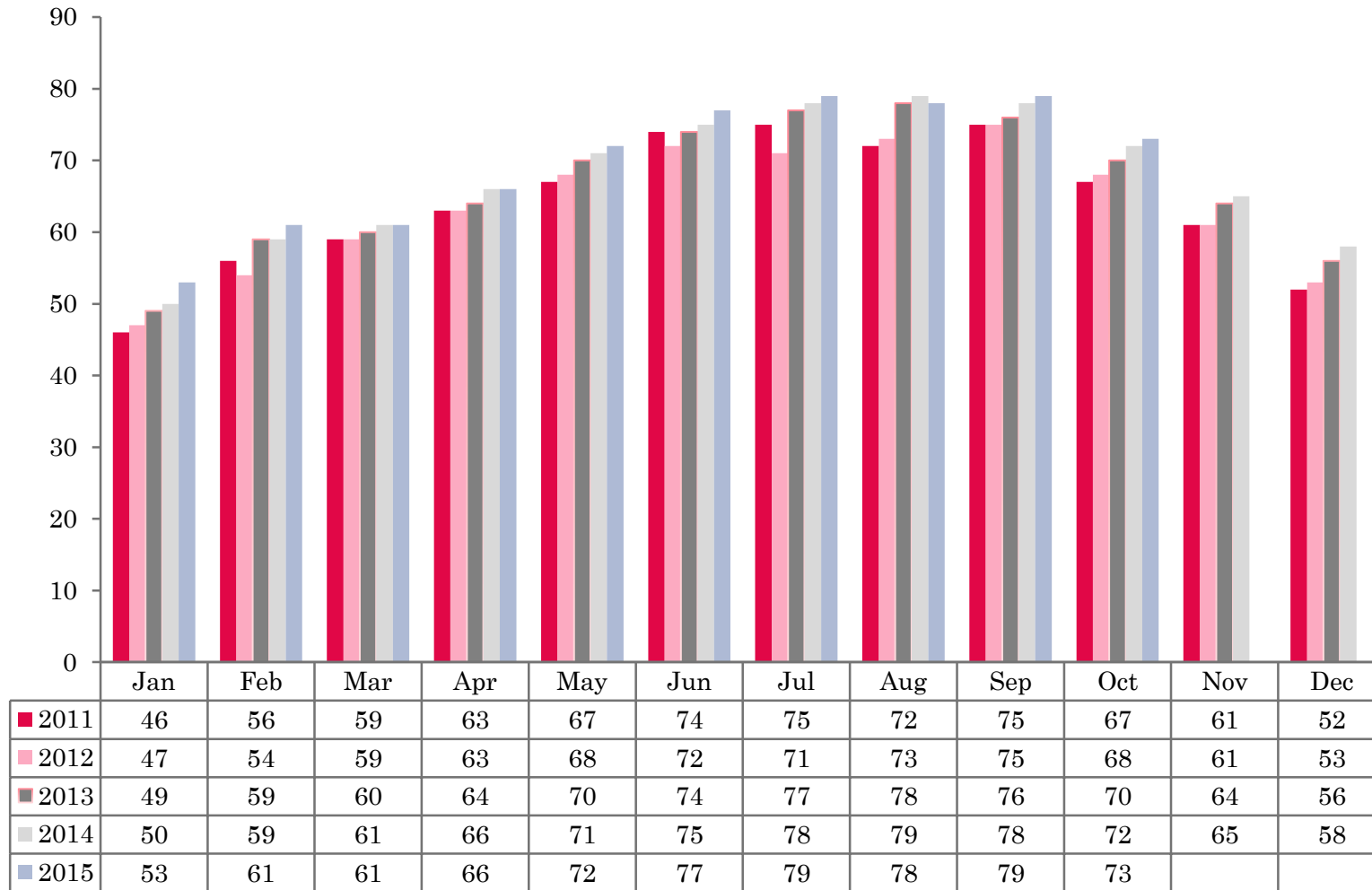
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2011 - 2015



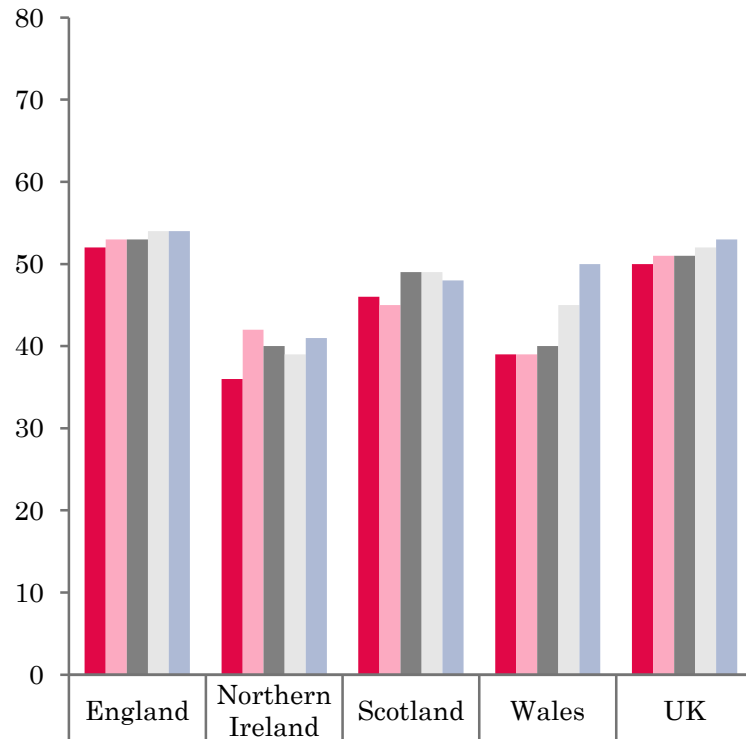
# UK BEDROOM OCCUPANCY 2011 - 2015



- ❖ 2,498 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 (53%) had remained static when compared to October 2014. Room occupancy had remained flat (+1%) when compared to the same period the previous year (73%).

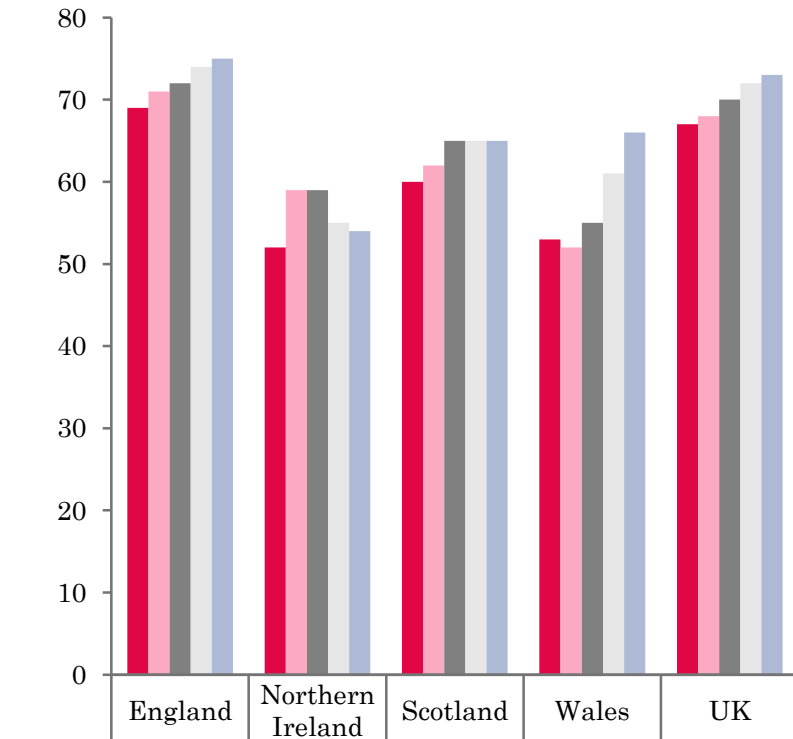


## NATIONAL BEDSPACE OCCUPANCY OCTOBER 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	52	36	46	39	50
2012	53	42	45	39	51
2013	53	40	49	40	51
2014	54	39	49	45	52
2015	54	41	48	50	53

## NATIONAL ROOM OCCUPANCY OCTOBER 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	69	52	60	53	67
2012	71	59	62	52	68
2013	72	59	65	55	70
2014	74	55	65	61	72
2015	75	54	65	66	73



- During October 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 occupancy levels remaining flat at 54%, and room occupancy remaining flat (+1%) at 75%, when compared with October 2014.
- Room occupancy levels in Northern Ireland remained flat (-1%) when compared to the same period last year. Bedspace occupancy had increased to 41%, a 2% increase on the same period in 2014.
- Wales bedspace occupancy levels increased by 5% during October, when compared to the same period in 2014. Room occupancy was at 66%, also up by a healthy 5% when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland remained flat during September 2015.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained flat when compared with the previous year. Both Northern Ireland and England mirrored the UK remaining static, with Wales also remaining flat (-1%). (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: October 2013 - 2015**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	53	54	54	72	74	75	1998	1897	1839
Northern Ireland	40	39	41	59	55	54	166	167	177
Scotland	49	49	48	65	65	65	302	292	280
Wales	40	45	50	55	61	66	141	112	202
<b>UK</b>	51	52	53	70	72	73	2607	2468	2498

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

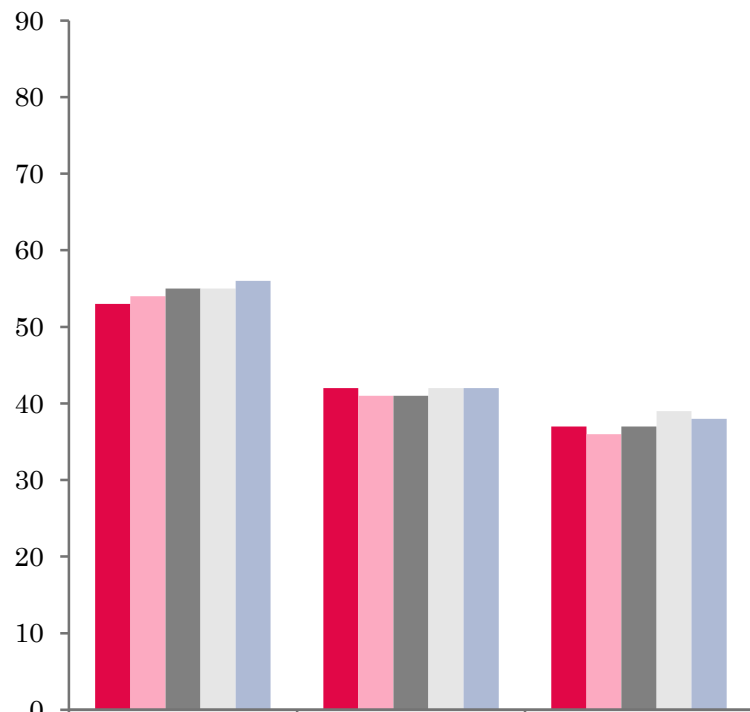
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	40	42	40	6	4	5	12	7	8	14	8	11	1998	1897	1839
Northern Ireland	17	19	21	23	20	20	40	40	36	58	51	49	166	167	177
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	302	292	280
Wales	35	39	41	2	3	2	**	**	**	6	6	5	141	112	202
<b>UK</b>	39	41	40	6	4	5	13	8	9	15	9	12	2607	2468	2498

\*\* FIGURES NOT AVAILABLE



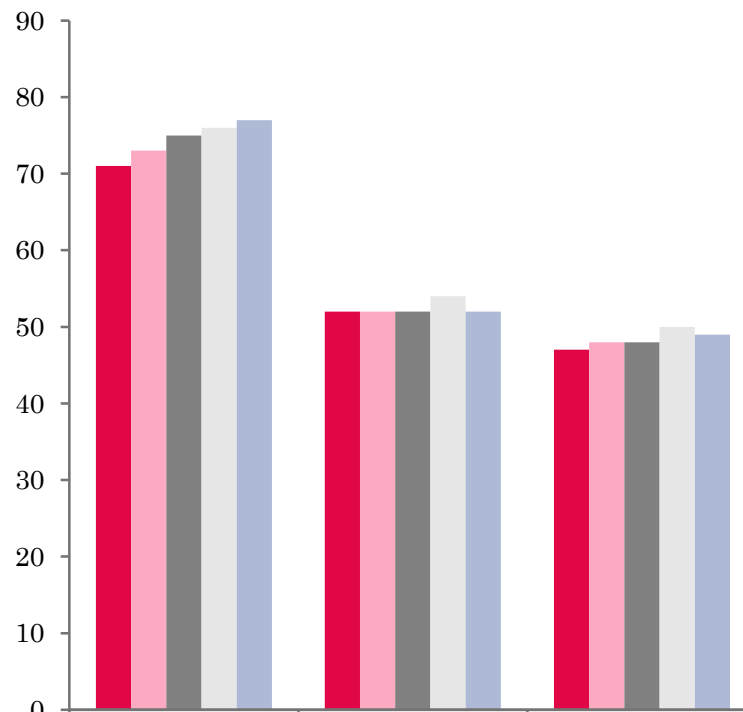


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION OCTOBER 2011-2015



	Hotels	Guesthouses	B&Bs
2011	53	42	37
2012	54	41	36
2013	55	41	37
2014	55	42	39
2015	56	42	38

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



	Hotels	Guesthouses	B&Bs
2011	71	52	47
2012	73	52	48
2013	75	52	48
2014	76	54	50
2015	77	52	49



- Room occupancy levels across both hotel and B&B's establishment types remained static during October 2015. Guesthouses witnessed a drop in room occupancy levels, down by 2% on October 2014. Bed occupancy across all establishment types remained flat when compared to October 2014.
- At the UK level, bed occupancy levels in four out of the six size bands had remained flat when compared to October 2014. A decrease in bed occupancy levels was found in the 1-3 and 51-100 size bandings, where occupancy was down by 2% and 4% respectively when compared to October 2014. An increase in room occupancy was found in both the 51-100 and >100 size bandings. The 51-100 size banding witnessed a 5% increase in room occupancy, with the >100 size banding increasing by 2% when compared to the same period in 2014. All other size bandings remained flat during October 2015.
- Both Small town and Countryside/Village locations increased by 2% in bed occupancy when compared to the same period the previous year. Seaside locations witnessed the only decrease in bed occupancy during October 2015, down 3% on October 2014. City/Large town remained flat. Both seaside and small town locations had increased by 2% in room occupancy when compared to October 2014. City/Large town and countryside/village locations remained flat in room occupancy during October.
- Only the £20.00-£29.99 and >£60.00 tariff bands witnessed an increase in bedspace occupancy during October up by 2% respectively. The other 3 bandings fell between 1%-3% points during October 2015. The only decrease in room occupancy during October was in the £30.00-£39.99 band which fell by 4%. The four remaining tariff bands all remained flat, compared with the same month in 2014.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	56	56	57	76	77	79	1488	1456	1466
Northern Ireland	47	45	49	70	64	65	70	78	78
Scotland	53	55	55	73	74	73	211	207	207
Wales	46	53	54	65	70	72	77	65	169
<b>UK</b>	55	55	56	75	76	77	1846	1806	1920
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	43	45	44	56	58	55	198	168	142
Northern Ireland	33	27	24	44	35	32	17	17	18
Scotland	38	35	35	43	43	43	38	37	30
Wales	22	28	31	29	33	40	22	19	13
<b>UK</b>	41	42	42	52	54	52	275	241	203
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	38	43	42	50	54	53	312	273	231
Northern Ireland	15	17	18	23	23	22	79	72	81
Scotland	39	29	26	46	40	38	53	48	43
Wales	23	24	28	30	27	31	42	28	20
<b>UK</b>	37	39	38	48	50	49	486	421	375



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: October 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	57	57	58	50	51	51	69	71	72	74	75	76
Northern Ireland	46	49	47	37	37	34	61	59	58	58	54	51
Scotland	53	52	52	47	46	47	64	64	63	66	66	68
Wales	46	50	58	35	41	44	58	62	69	54	61	65
<b>UK</b>	56	56	57	48	49	50	68	69	70	71	73	74



**Table 5: Non-UK Percentages: October 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	5	7	13	8	10	13	7	9	17	9	13
Northern Ireland	38	36	34	44	44	39	52	48	36	56	52	40
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	5	4	7	7	5
<b>UK</b>	11	6	8	14	9	11	13	8	9	17	10	13

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: October 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	32	35	34	151	40	43	43	212	49	50	49	91
Northern Ireland	12	12	13	67	32	19	22	25	28	30	32	31
Scotland	30	25	21	34	45	40	38	48	49	50	52	47
Wales	23	27	28	20	30	36	39	21	35	48	53	23
<b>UK</b>	31	33	31	272	40	42	42	306	48	49	49	192

**Table6: Occupancy Levels by Size: October 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	57	55	55	55	53	56	51	30	56	58	59	1288
Northern Ireland	29	47	41	19	45	49	47	21	58	46	55	14
Scotland	50	51	54	52	58	58	56	40	57	60	60	59
Wales	44	47	48	20	54	67	68	9	53	56	58	109
<b>UK</b>	55	54	54	146	54	57	53	100	56	58	59	1470



**Table 7: Occupancy Levels by Size: October 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	40	44	43	151	51	55	54	212	64	65	64	91
Northern Ireland	18	19	16	67	39	26	26	25	41	44	44	31
Scotland	39	35	30	34	51	49	47	48	61	63	64	47
Wales	29	32	32	20	36	43	48	21	47	61	64	23
<b>UK</b>	39	41	40	375	50	53	52	306	62	64	64	192

**Table 7: Occupancy Levels by Size: October 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	72	75	74	55	71	68	73	30	81	82	84	1288
Northern Ireland	59	60	55	19	64	66	65	21	82	68	71	14
Scotland	68	71	71	52	78	77	76	40	83	84	83	59
Wales	60	63	65	20	74	69	78	9	82	86	84	109
<b>UK</b>	71	73	73	146	72	69	74	100	81	82	84	1470



**Table 8: Occupancy Levels by Location Types: October 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	46	52	47	177	60	60	61	1013	47	49	51	364	47	46	49	285
Northern Ireland	50	34	34	38	31	47	49	64	32	26	26	49	14	27	19	26
Scotland	49	49	50	36	56	56	56	117	38	39	40	55	44	45	39	72
Wales	43	53	64	27	52	55	52	7	38	45	59	13	32	36	47	50
<b>UK</b>	46	51	48	278	58	59	60	1201	45	47	49	481	45	45	47	433

**Table 8: Occupancy Levels by Location Types: October 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	59	64	65	177	83	83	84	1013	69	71	72	364	63	62	64	285
Northern Ireland	75	45	45	38	39	65	65	64	43	36	35	49	25	38	25	26
Scotland	60	62	65	36	78	78	78	117	59	54	57	55	52	55	50	72
Wales	55	64	78	27	80	79	78	7	54	59	75	13	42	48	60	50
<b>UK</b>	59	63	65	278	81	82	82	1201	66	67	69	481	59	60	61	433



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	**	**	**	**	36	44	43	25	31	34	29	79
Northern Ireland	**	**	**	**	17	11	18	19	14	18	15	54
Scotland	**	**	**	**	36	18	30	6	30	31	28	37
Wales	**	**	**	**	17	21	9	2	24	29	43	15
<b>UK</b>	**	**	**	**	35	38	40	50	30	33	29	185

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	43	43	42	107	47	50	46	70	55	55	57	1307
Northern Ireland	26	36	38	31	43	45	38	13	48	44	49	60
Scotland	38	43	37	38	55	56	56	26	56	57	56	172
Wales	28	34	44	15	45	46	56	19	48	54	62	151
<b>UK</b>	41	42	41	191	48	51	48	128	55	55	57	1690

\*\* FIGURES NOT AVAILABLE



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 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	**	**	**	**	47	52	50	25	42	47	40	79
Northern Ireland	**	**	**	**	23	20	19	19	20	25	20	54
Scotland	**	**	**	**	45	28	44	6	49	43	41	37
Wales	**	**	**	**	22	31	12	2	27	33	56	15
<b>UK</b>	**	**	**	**	45	47	48	50	42	45	41	185

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 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	54	55	56	107	59	62	59	70	76	77	78	1307
Northern Ireland	37	51	52	31	64	61	49	13	72	62	65	60
Scotland	53	57	54	38	70	72	73	26	74	75	73	172
Wales	44	51	63	15	58	61	71	19	68	73	81	151
<b>UK</b>	53	55	56	191	61	63	62	128	75	76	77	1690

\*\* 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)

