



UNITED KINGDOM OCCUPANCY SURVEY

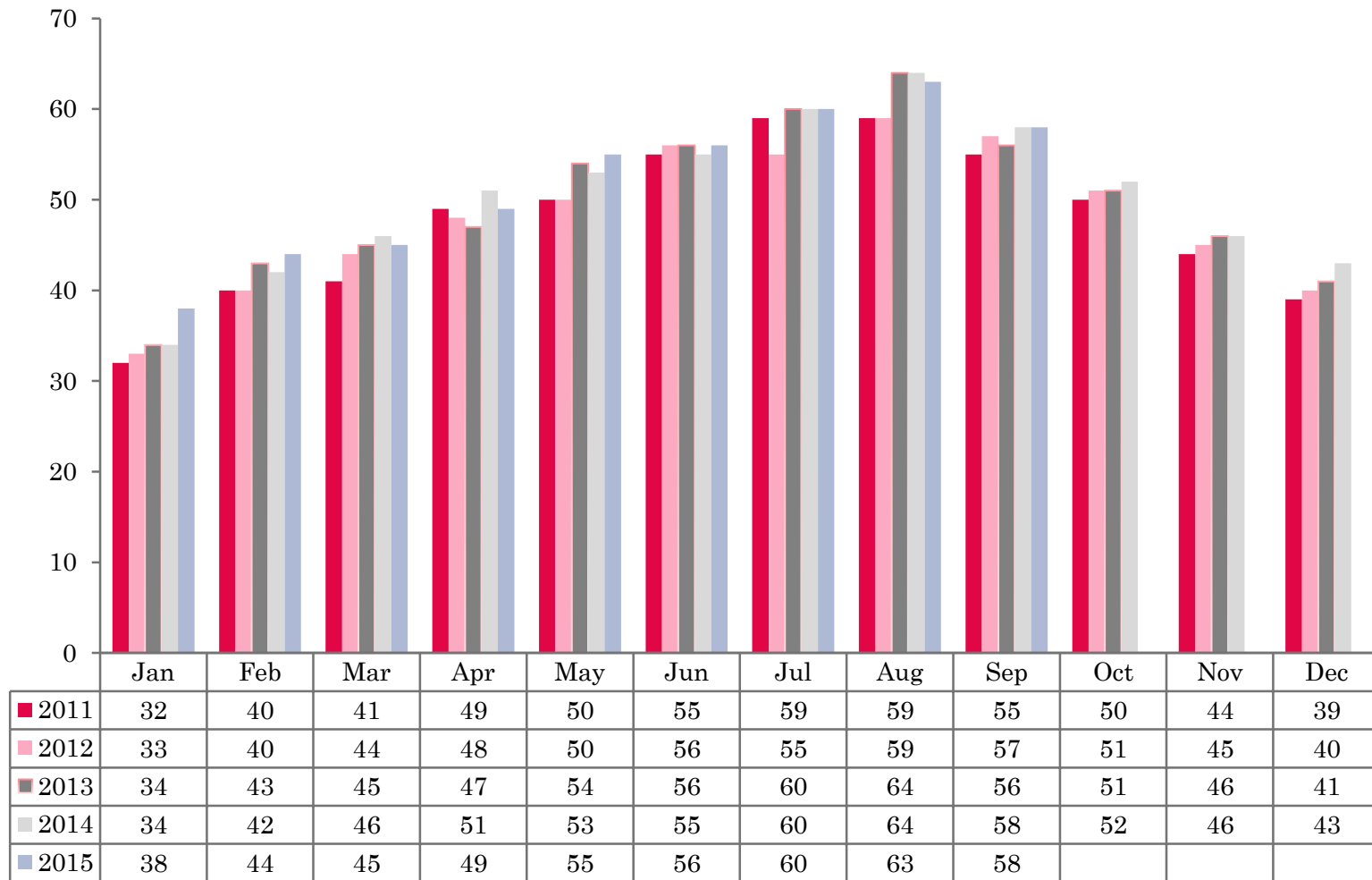
Serviced Accommodation Summary Report
September 2015

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



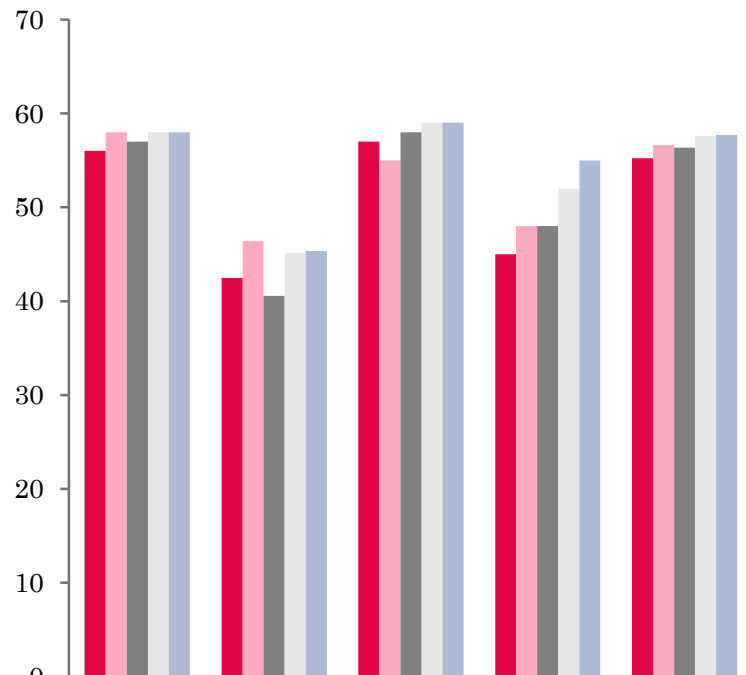
UK BEDROOM OCCUPANCY 2011 - 2015



- ❖ 2,525 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 (58%) had remained static when compared to September 2014. Room occupancy had remained flat (+1%) when compared to the same period the previous year (79%).

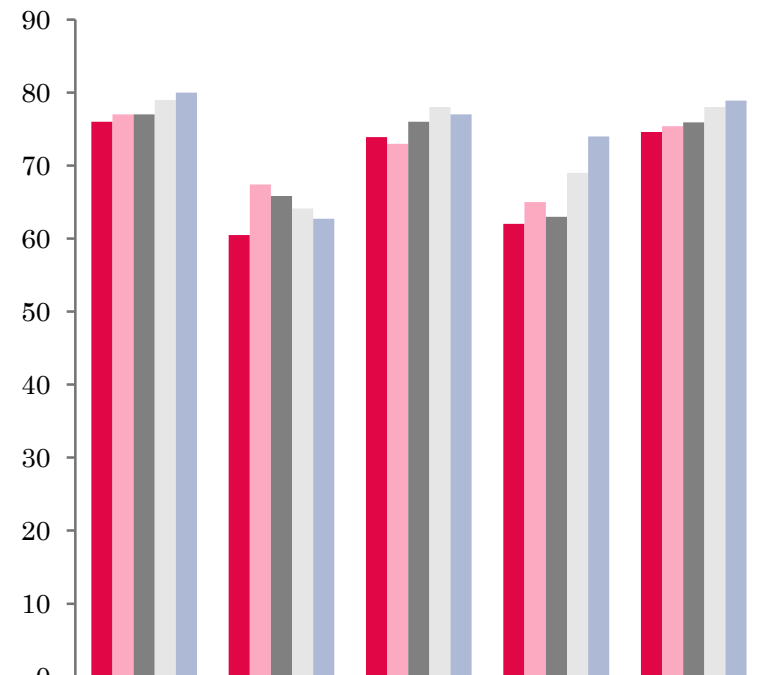


NATIONAL BEDSPACE OCCUPANCY SEPTEMBER 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
■ 2011	56	42	57	45	55
■ 2012	58	46	55	48	57
■ 2013	57	41	58	48	56
■ 2014	58	45	59	52	58
■ 2015	58	45	59	55	58

NATIONAL ROOM OCCUPANCY SEPTEMBER 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
■ 2011	76	60	74	62	75
■ 2012	77	67	73	65	75
■ 2013	77	66	76	63	76
■ 2014	79	64	78	69	78
■ 2015	80	63	77	74	79



- During September 2015 both UK bedspace occupancy and room occupancy remained static when compared with the same month in 2014.
- England occupancy levels mirrored that of the UK, with bedspace occupancy levels remaining static at 58%, and room occupancy remaining flat (+1%) at 80%, when compared with September 2014.
- Room occupancy levels in Northern Ireland remained flat (-1%) when compared to the same period last year. Bedspace occupancy was 45%, the same as September 2014.
- Wales bedspace occupancy levels increased by 3% during September, when compared to the same period in 2014. Room occupancy was at 74%, up by a healthy 5% when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland remained static 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 static (-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: September 2013 - 2015

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	57	58	58	77	79	80	2014	1903	1855
Northern Ireland	41	45	45	66	64	63	181	171	173
Scotland	58	59	59	76	78	77	306	306	291
Wales	48	52	55	63	69	74	141	120	206
UK	56	58	58	76	78	79	2642	2500	2525

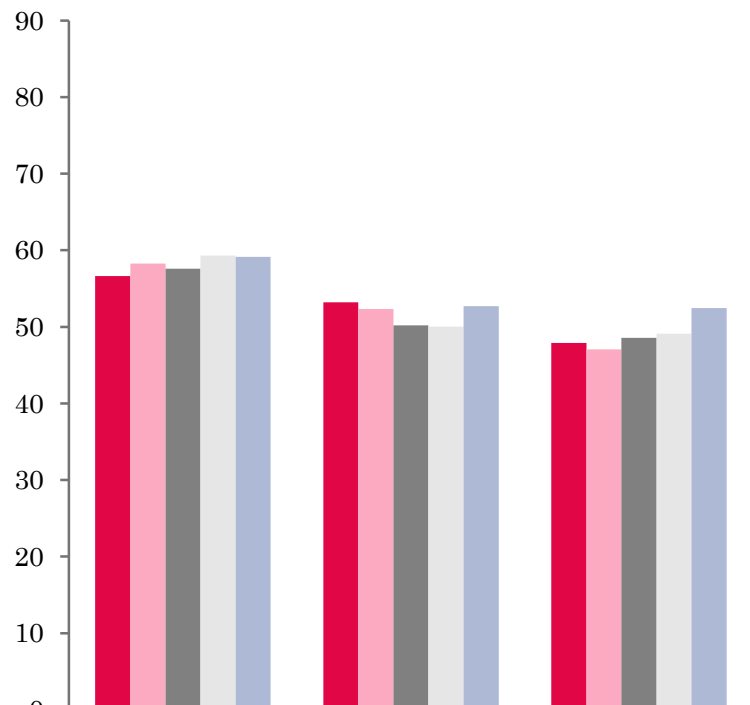
Table 2: UK/Non UK Occupancy Levels September 2013 – 2015 (see note 5a and 5b Slide 19)

	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	47	48	49	8	5	5	13	9	9	14	9	10	2014	1903	1855
Northern Ireland	21	21	20	20	24	25	43	44	41	49	53	55	181	171	173
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	306	306	291
Wales	43	48	50	4	4	3	**	**	**	9	8	6	141	120	206
UK	46	47	48	8	5	5	14	10	10	15	10	11	2642	2500	2525

** FIGURES NOT AVAILABLE

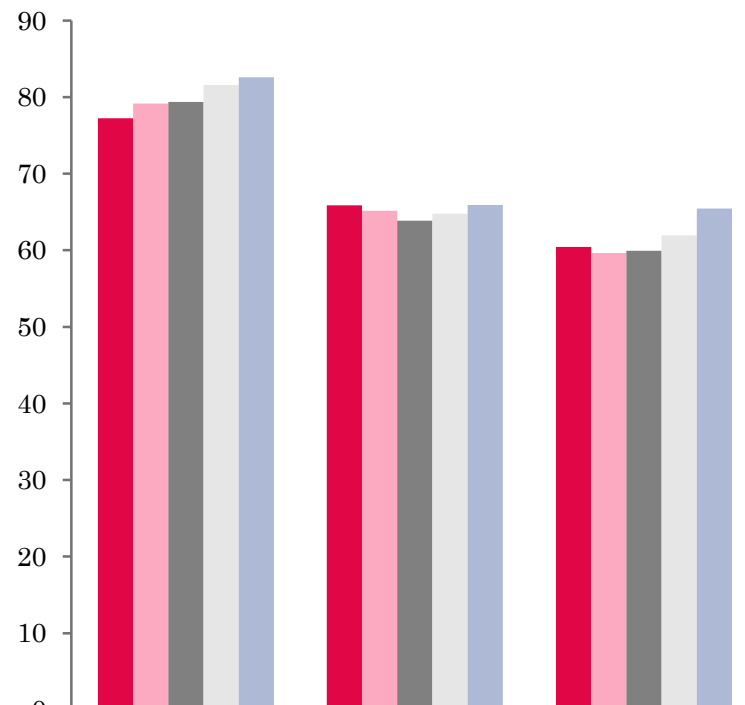


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION SEPTEMBER 2011-2015



	Hotels	Guesthouses	B&Bs
■ 2011	57	53	48
■ 2012	58	52	47
■ 2013	58	50	49
■ 2014	59	50	49
■ 2015	59	53	52

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



	Hotels	Guesthouses	B&Bs
■ 2011	77	66	60
■ 2012	79	65	60
■ 2013	79	64	60
■ 2014	82	65	62
■ 2015	83	66	65



- Room occupancy levels across both hotel and guesthouse establishment types remained static during September 2015. B&B's witnessed a rise in room occupancy levels, up by 3% on September 2014. Bed occupancy in the Hotel sector remained static. In both the B&B and Guesthouse sector, bed occupancy levels increased by 3% respectively, when compared to September 2014.
- At the UK level, bed occupancy levels in five out of the six size bands had remained static when compared to September 2014. An increase in bed occupancy levels was found in the 11-25 size banding, where occupancy was up by 3% when compared to September 2014. An increase in room occupancy was found in the 1-3, 11-25, and 51-100 size bandings. Both the 1-3 and 11-25 size bandings increased by 3% on the same period last year. The 51-100 size banding witnessed a 2% increase in room occupancy. All other size bandings remained static during September 2015.
- Small town locations witnessed the only increase in bed occupancy during September 2015, up 2% on September 2014. All other locations remained static when compared to the same period the previous years. With the exception of city/large town locations which had remained flat (+1%), room occupancy levels in all other locations had increased by between 2% and 4%. Both seaside and countryside/village locations had increased by 2% in room occupancy when compared to September 2014. Small towns witnessed the biggest increase, up by 4% on the same period last year.
- Four out of the five tariff bandings saw little change in bed occupancy during September. The £40.00-£49.99 tariff band was the only tariff band to increase, up by 4% on 2014 data. Both the £40.00-£49.99 and >£60.00 tariff bands witnessed an increase in room occupancy, up by 4% and 2% respectively when compared with September 2014. The £30.00-£39.99 and £50.00-£59.99 bands remained static, with the £20.00-£29.99 witnessing a downturn in room occupancy levels, down by 6% on the same period last year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	58	59	59	80	82	83	1482	1451	1461
Northern Ireland	46	51	54	75	73	74	75	79	75
Scotland	59	63	61	80	83	83	212	214	205
Wales	52	57	58	70	75	79	74	69	169
UK	58	59	59	79	82	83	1843	1813	1910
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	50	50	54	65	66	69	206	174	156
Northern Ireland	42	33	26	55	45	43	18	17	18
Scotland	56	55	53	65	66	58	41	36	35
Wales	39	43	43	47	51	52	24	19	17
UK	50	50	53	64	65	66	289	246	226
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	49	51	54	61	64	68	326	278	238
Northern Ireland	20	26	21	30	36	28	88	75	80
Scotland	55	48	54	64	62	65	53	56	51
Wales	35	33	37	44	41	44	43	32	20
UK	49	49	52	60	62	65	510	441	389



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: September 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	59	61	62	54	54	55	72	76	77	80	80	82
Northern Ireland	47	53	50	36	42	38	70	68	65	63	63	59
Scotland	61	63	63	56	57	56	73	78	77	78	79	78
Wales	52	57	62	45	47	51	62	70	74	64	68	74
UK	59	61	62	54	54	55	72	76	77	78	79	81



Table 5: Non-UK Percentages: September 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	11	6	7	16	11	11	14	8	9	17	10	10
Northern Ireland	39	39	41	49	48	44	38	54	45	45	61	48
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	8	7	6	10	9	6
UK	12	7	8	17	12	12	14	9	10	17	11	11

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Table 6: Occupancy Levels by Size: September 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	45	45	47	158	50	52	53	221	53	55	59	96
Northern Ireland	18	22	19	68	31	28	25	23	32	33	36	30
Scotland	45	43	45	38	62	57	59	57	58	63	59	47
Wales	34	34	34	21	42	46	51	24	45	53	61	22
UK	44	44	45	285	51	52	53	325	53	56	59	195

Table6: Occupancy Levels by Size: September 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	63	61	60	52	57	58	56	29	60	58	59	1299
Northern Ireland	35	50	42	19	37	51	53	20	57	54	59	13
Scotland	58	62	61	49	62	65	65	42	59	62	61	58
Wales	54	51	53	20	57	69	64	9	54	63	56	110
UK	61	60	59	140	57	59	58	100	59	59	59	1480



Table 7: Occupancy Levels by Size: September 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	53	55	59	158	63	66	66	221	70	72	76	96
Northern Ireland	25	31	25	68	44	44	29	23	51	46	54	30
Scotland	54	57	59	38	71	68	66	57	72	78	75	47
Wales	41	41	41	21	51	58	62	24	59	64	75	22
UK	52	54	57	375	63	65	65	325	69	72	75	195

Table 7: Occupancy Levels by Size: September 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	79	79	81	52	75	77	78	29	83	85	86	1299
Northern Ireland	63	70	66	19	71	72	72	20	85	77	80	13
Scotland	80	83	81	49	84	86	87	42	88	89	88	58
Wales	72	69	71	20	73	76	84	9	79	91	85	110
UK	78	79	80	140	76	78	80	100	84	86	86	1480



Table 8: Occupancy Levels by Location Types: September 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	59	56	56	176	60	61	60	1009	51	53	55	372	56	56	57	298
Northern Ireland	41	44	38	33	46	52	56	60	29	32	31	47	17	25	17	27
Scotland	60	60	59	39	62	64	63	120	47	50	53	55	58	57	57	77
Wales	53	61	64	29	52	59	52	7	48	59	59	12	42	43	47	52
UK	58	57	56	277	60	61	60	1196	50	52	54	486	55	55	56	454

Table 8: Occupancy Levels by Location Types: September 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	71	73	75	176	83	85	86	1009	74	75	79	372	71	70	72	298
Northern Ireland	60	59	52	33	77	74	75	60	43	45	42	47	31	36	34	27
Scotland	74	75	76	39	86	89	87	120	66	69	72	55	70	70	68	77
Wales	67	74	78	29	74	85	78	7	69	71	75	12	52	54	60	52
UK	71	73	75	277	83	85	86	1196	72	73	77	486	69	68	70	454

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	**	**	**	**	35	38	40	25	39	40	40	85
Northern Ireland	**	**	**	**	22	24	15	18	22	29	20	52
Scotland	**	**	**	**	52	44	44	5	47	47	45	43
Wales	**	**	**	**	21	36	9	3	38	37	43	19
UK	**	**	**	**	37	39	38	51	40	41	40	199

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	53	54	57	117	53	56	57	68	58	59	59	1531
Northern Ireland	32	32	41	34	43	49	45	14	46	51	54	65
Scotland	55	53	55	42	67	65	66	31	61	64	63	170
Wales	41	34	44	15	51	72	56	16	55	60	62	153
UK	52	52	56	208	55	58	58	129	58	60	60	1919

** FIGURES NOT AVAILABLE



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	**	**	**	**	48	54	54	25	54	54	54	85
Northern Ireland	**	**	**	**	31	40	18	18	30	39	27	52
Scotland	**	**	**	**	66	57	33	5	61	60	58	43
Wales	**	**	**	**	28	53	12	3	49	47	56	19
UK	**	**	**	**	49	54	48	51	54	54	54	199

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	68	68	71	117	67	72	72	68	79	81	83	1531
Northern Ireland	46	46	57	34	68	68	57	14	77	73	74	65
Scotland	68	70	73	42	81	84	83	31	82	83	83	170
Wales	56	57	63	15	63	75	71	16	73	79	81	153
UK	67	67	71	208	69	74	73	129	79	81	83	1919

** 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)

