



UNITED KINGDOM OCCUPANCY SURVEY

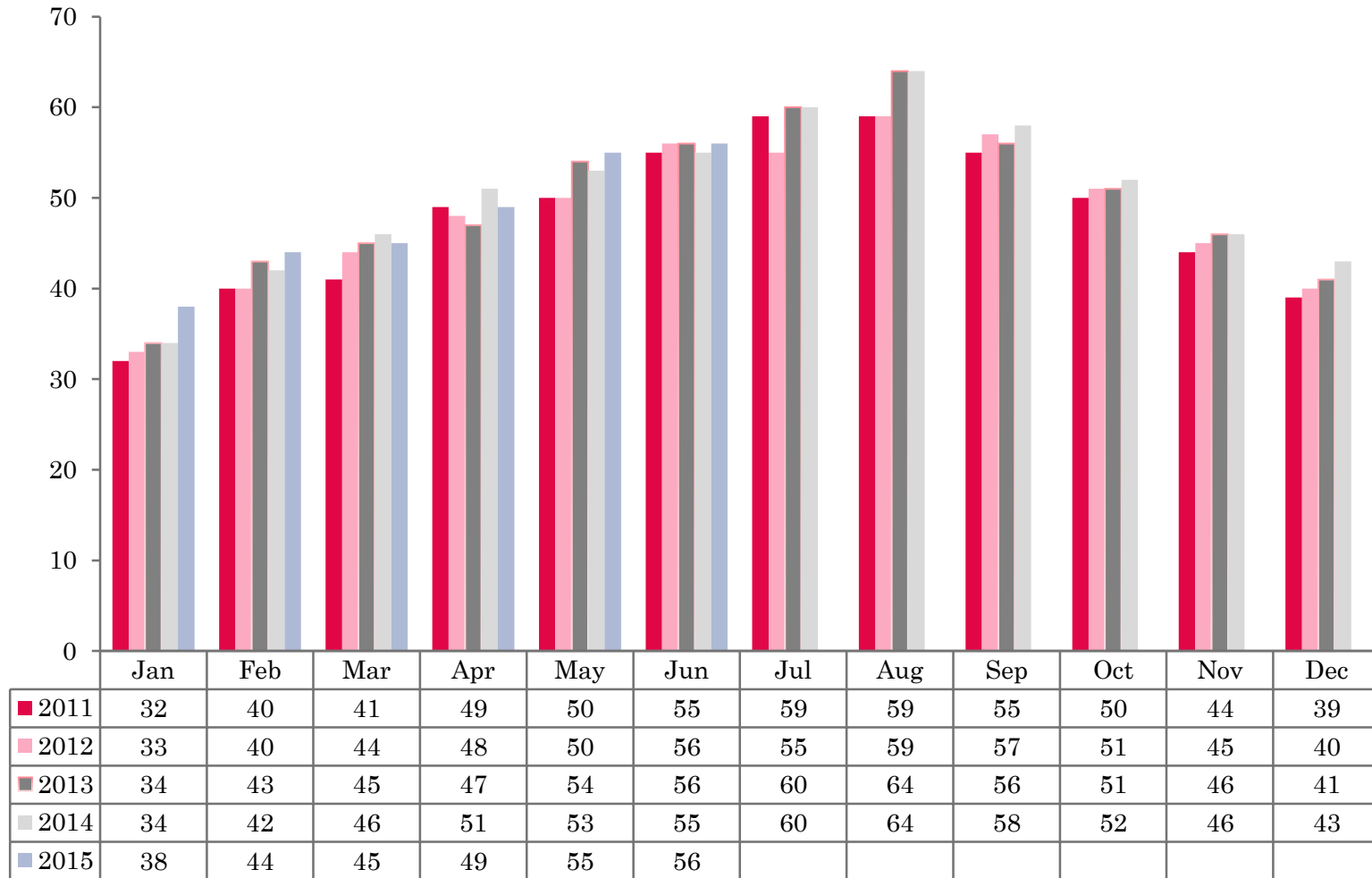
Serviced Accommodation Summary Report
June 2015

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



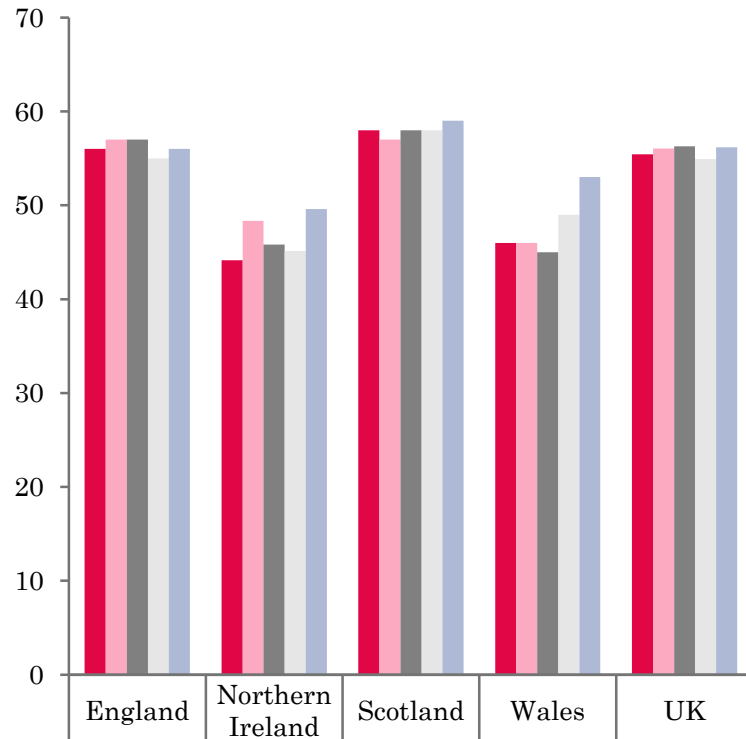
UK BEDROOM OCCUPANCY 2011 - 2015



- ❖ 2,554 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 (56%) had remained static when compared to June 2014. Room occupancy had increased by 2% when compared to the same period as the previous year (77%).

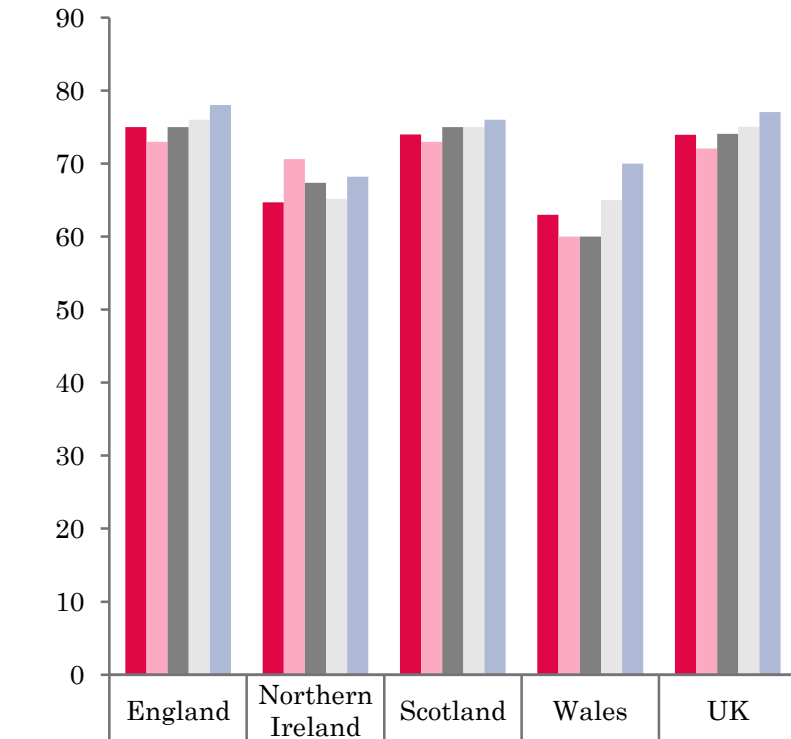


NATIONAL BEDSPACE OCCUPANCY JUNE 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	56	44	58	46	55
2012	57	48	57	46	56
2013	57	46	58	45	56
2014	55	45	58	49	55
2015	56	50	59	53	56

NATIONAL ROOM OCCUPANCY JUNE 2011-2015



	England	Northern Ireland	Scotland	Wales	UK
2011	75	65	74	63	74
2012	73	71	73	60	72
2013	75	67	75	60	74
2014	76	65	75	65	75
2015	78	68	76	70	77



- During June 2015 UK bedspace occupancy had remained static (+1%), with room occupancy increasing by 2% when compared with the same month in 2014.
- England occupancy levels mirrored that of the UK, with bedspace occupancy remaining flat (+1%) and room occupancy increasing by 2% when compared with June 2014.
- Room occupancy in Northern Ireland increased by 3% in June 2015 when compared to the same period last year. Bedspace occupancy was also up by a healthy margin, with an increase of 5% on June 2014.
- Wales bedspace occupancy levels witnessed a 4% increase during June, with bedroom occupancy levels fairing even better, up by 5% when compared with the same period the previous year.
- Both room and bedspace occupancy levels across Scotland remained static (+1%) during June 2015.
- 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 4% on June 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: June 2013 - 2015

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	57	55	56	75	76	78	2051	1944	1861
Northern Ireland	46	45	50	67	65	68	169	166	186
Scotland	58	58	59	75	75	76	313	304	293
Wales	45	49	53	60	65	70	138	117	214
UK	56	55	56	74	75	77	2671	2531	2554

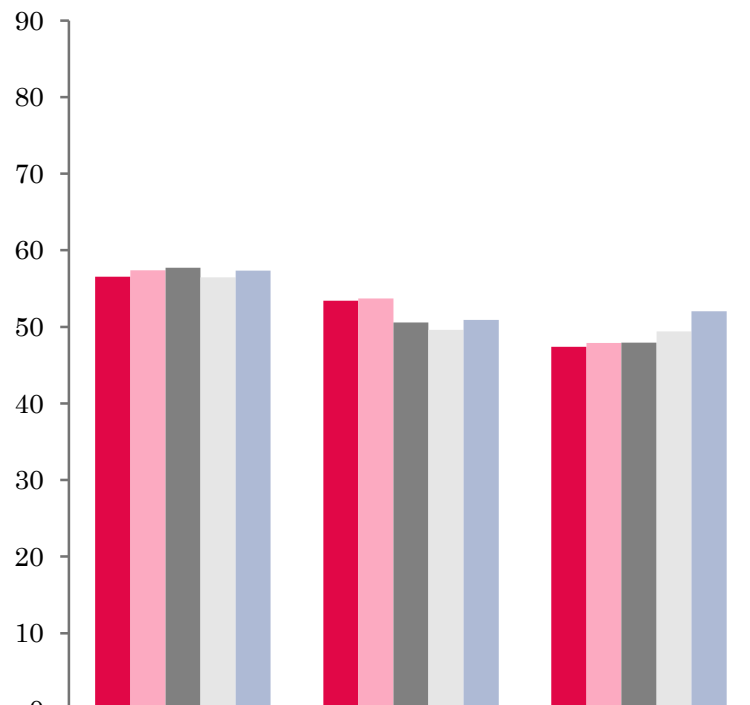
Table 2: UK/Non UK Occupancy Levels June 2013 – 2015 (see note 5a and 5b Slide 19)

	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	43	46	8	9	7	13	14	13	16	17	13	2051	1944	1861
Northern Ireland	22	21	22	24	24	28	43	46	45	52	53	56	169	166	186
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	313	304	293
Wales	40	43	45	4	5	4	**	**	**	9	10	8	138	117	214
UK	42	42	45	8	9	7	14	15	14	16	17	14	2671	2531	2554

** FIGURES NOT AVAILABLE

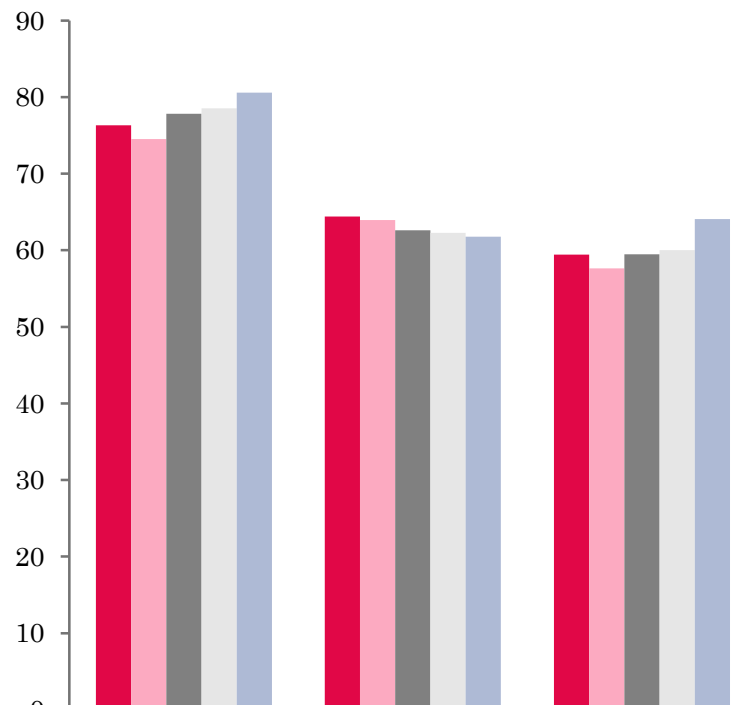


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JUNE 2011-2015



	Hotels	Guesthouses	B&Bs
■ 2011	57	53	47
■ 2012	57	54	48
■ 2013	58	51	48
■ 2014	56	50	49
■ 2015	57	51	52

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



	Hotels	Guesthouses	B&Bs
■ 2011	76	64	59
■ 2012	75	64	58
■ 2013	78	63	59
■ 2014	79	62	60
■ 2015	81	62	64



- Both Room and bedspace occupancy levels across all establishment types either increased or remained static during June 2015. Both the Hotel and Guesthouse sector remained flat in bed occupancy levels, with room occupancy in the hotel sector up by 2%. Bed occupancy in the B&B sector, increased by 3%, whilst room occupancy rose by 4% when compared with the same period the previous year.
- Occupancy levels across all of the size bands had remained static in bedspace occupancy when compared to June 2014, with the exception of the 11-25 size banding which increased by 2% on the same period last year. Four out of the six size bandings increased in their room occupancy levels during June 2015. The largest of these was found in the 1-3 and 4-10 size banding where levels rose by 3% respectively.
- Only the City/Large Town location remained static in bedspace occupancy during June 2015 with all other locations increasing. The largest of these was seaside locations, up by 3%, with both small town and countryside/village locations up by 2% when compared to June 2014. City/Large town locations remained static in their levels of room occupancy. The largest increase in room occupancy levels was found in seaside locations, up by 5% compared to 2014. Both small town and countryside/village locations increased by 3% respectively.
- All tariff bandings either increased or remained static in both room and bedspace occupancy levels during June. The £30.00-£39.99 tariff band witnessed the largest increase in both bed and room occupancy when compared with June 2014. Bed occupancy rose by a healthy 7% and room occupancy up 6% on the same period the previous year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	58	56	57	78	79	81	1496	1477	1456
Northern Ireland	52	54	58	78	74	79	63	70	77
Scotland	60	60	60	80	79	81	214	210	206
Wales	49	54	55	69	72	74	68	60	167
UK	58	56	57	78	79	81	1841	1817	1906
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	51	50	51	64	63	62	214	183	156
Northern Ireland	38	29	25	49	59	37	18	18	20
Scotland	55	55	56	64	65	66	44	40	33
Wales	36	37	45	43	45	56	28	20	21
UK	51	50	51	63	62	62	304	261	230
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	48	50	53	60	61	66	341	284	249
Northern Ireland	25	22	29	36	30	36	88	78	89
Scotland	53	55	56	64	66	66	55	54	54
Wales	41	35	35	48	40	41	42	37	24
UK	48	49	52	59	60	64	526	453	416



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: June 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	59	53	54	54	71	70	72	79	79	80
Northern Ireland	50	53	54	42	41	42	68	66	69	68	62	64
Scotland	60	61	61	58	57	58	71	72	73	79	77	79
Wales	49	52	59	41	45	48	61	64	70	60	66	69
UK	57	57	59	53	54	54	70	70	72	78	78	79



Table 5: Non-UK Percentages: June 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	13	10	16	17	15	15	16	12	17	19	15
Northern Ireland	43	36	41	51	43	49	53	45	44	57	48	48
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	8	9	8	11	12	9
UK	12	14	11	17	18	16	15	16	13	18	19	15

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: June 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	46	165	49	48	49	225	51	53	56	95
Northern Ireland	21	17	17	82	38	25	33	21	35	38	39	29
Scotland	52	50	53	43	53	59	59	57	61	59	59	42
Wales	37	36	33	24	41	42	49	30	42	52	54	22
UK	45	45	46	314	49	49	50	333	52	54	56	188

Table6: Occupancy Levels by Size: June 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	59	61	59	54	59	56	57	28	57	56	58	1281
Northern Ireland	39	46	53	20	49	54	58	20	61	62	62	14
Scotland	60	60	61	51	63	62	63	42	62	59	59	58
Wales	51	51	52	19	53	62	68	9	55	55	55	110
UK	58	60	59	144	59	57	58	99	58	57	58	1463



Table 7: Occupancy Levels by Size: June 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	54	54	58	165	61	60	62	225	67	69	71	95
Northern Ireland	29	24	24	82	48	48	41	21	48	53	56	29
Scotland	64	62	62	43	63	67	69	57	74	74	75	42
Wales	46	43	39	24	50	52	60	30	54	60	63	22
UK	55	54	57	375	60	60	63	333	67	69	71	188

Table 7: Occupancy Levels by Size: June 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	76	75	75	54	75	76	79	28	82	82	84	1281
Northern Ireland	67	66	70	20	74	75	78	20	88	80	85	14
Scotland	79	78	80	51	84	82	82	42	86	86	87	58
Wales	69	66	71	19	77	75	79	9	85	86	84	110
UK	76	75	75	144	76	77	79	99	83	83	84	1463



Table 8: Occupancy Levels by Location Types: June 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	51	55	177	60	59	59	1011	51	50	52	369	54	53	55	304
Northern Ireland	44	46	44	47	53	54	61	61	35	32	32	44	25	22	23	34
Scotland	65	62	60	33	61	60	61	120	50	49	53	62	58	60	60	78
Wales	55	58	59	31	52	43	53	7	40	58	55	12	39	39	44	56
UK	59	53	56	288	60	58	59	1199	50	50	52	487	53	53	55	472

Table 8: Occupancy Levels by Location Types: June 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	69	68	74	177	83	83	84	1011	72	72	74	369	69	67	71	304
Northern Ireland	61	62	56	47	80	75	82	61	47	49	44	44	43	32	35	34
Scotland	78	74	76	33	81	83	83	120	67	64	71	62	71	72	71	78
Wales	67	69	71	31	74	79	75	7	67	69	71	12	49	49	54	56
UK	70	69	74	288	82	83	83	1199	70	70	73	487	68	66	69	472

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	**	**	**	**	33	32	32	28	39	38	46	91
Northern Ireland	**	**	**	**	15	12	21	22	25	25	21	55
Scotland	**	**	**	**	44	49	42	6	49	49	50	44
Wales	**	**	**	**	27	26	21	4	38	38	38	25
UK	**	**	**	**	34	34	33	60	40	39	46	215

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	53	55	112	53	58	58	72	57	57	57	1558
Northern Ireland	34	34	43	35	43	51	52	17	54	53	60	57
Scotland	56	57	57	42	68	65	64	23	62	61	62	178
Wales	36	39	41	16	50	66	53	17	52	57	58	151
UK	52	52	54	205	55	59	59	129	57	58	58	1944

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	**	**	**	**	42	47	48	28	51	50	57	91
Northern Ireland	**	**	**	**	24	19	25	22	34	31	30	55
Scotland	**	**	**	**	56	58	51	6	63	60	60	44
Wales	**	**	**	**	35	35	33	4	47	48	51	25
UK	**	**	**	**	43	47	47	60	52	51	57	215

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	66	66	67	112	63	71	71	72	78	78	80	1558
Northern Ireland	49	50	62	35	62	77	74	17	80	74	79	57
Scotland	70	71	72	42	82	76	80	23	81	81	82	178
Wales	54	56	62	16	61	68	66	17	71	74	76	151
UK	66	66	67	205	66	72	72	129	78	78	80	1944

** 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)

