



UNITED KINGDOM OCCUPANCY SURVEY

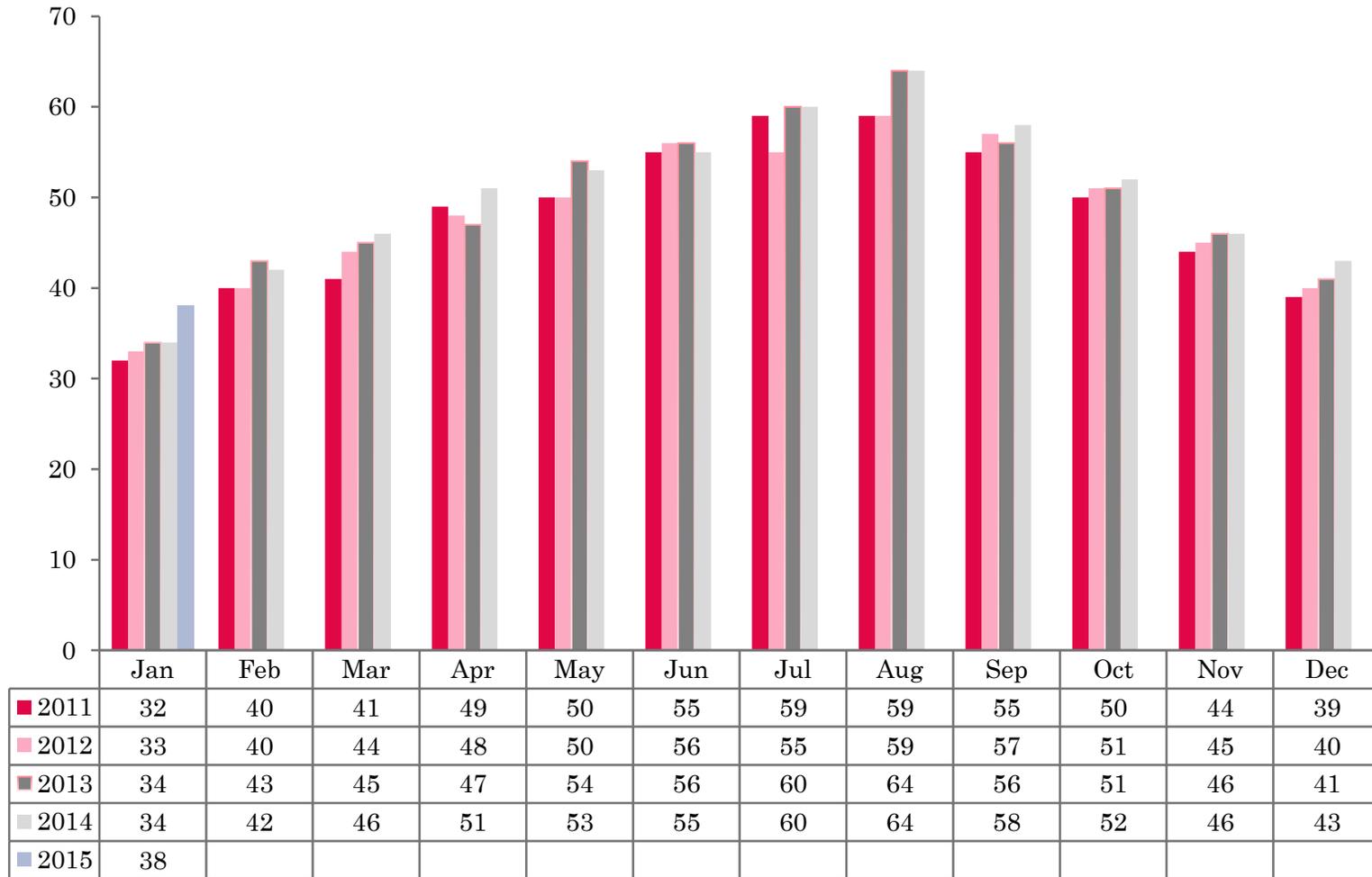
Serviced Accommodation Summary Report
January 2015

UK OCCUPANCY SURVEY

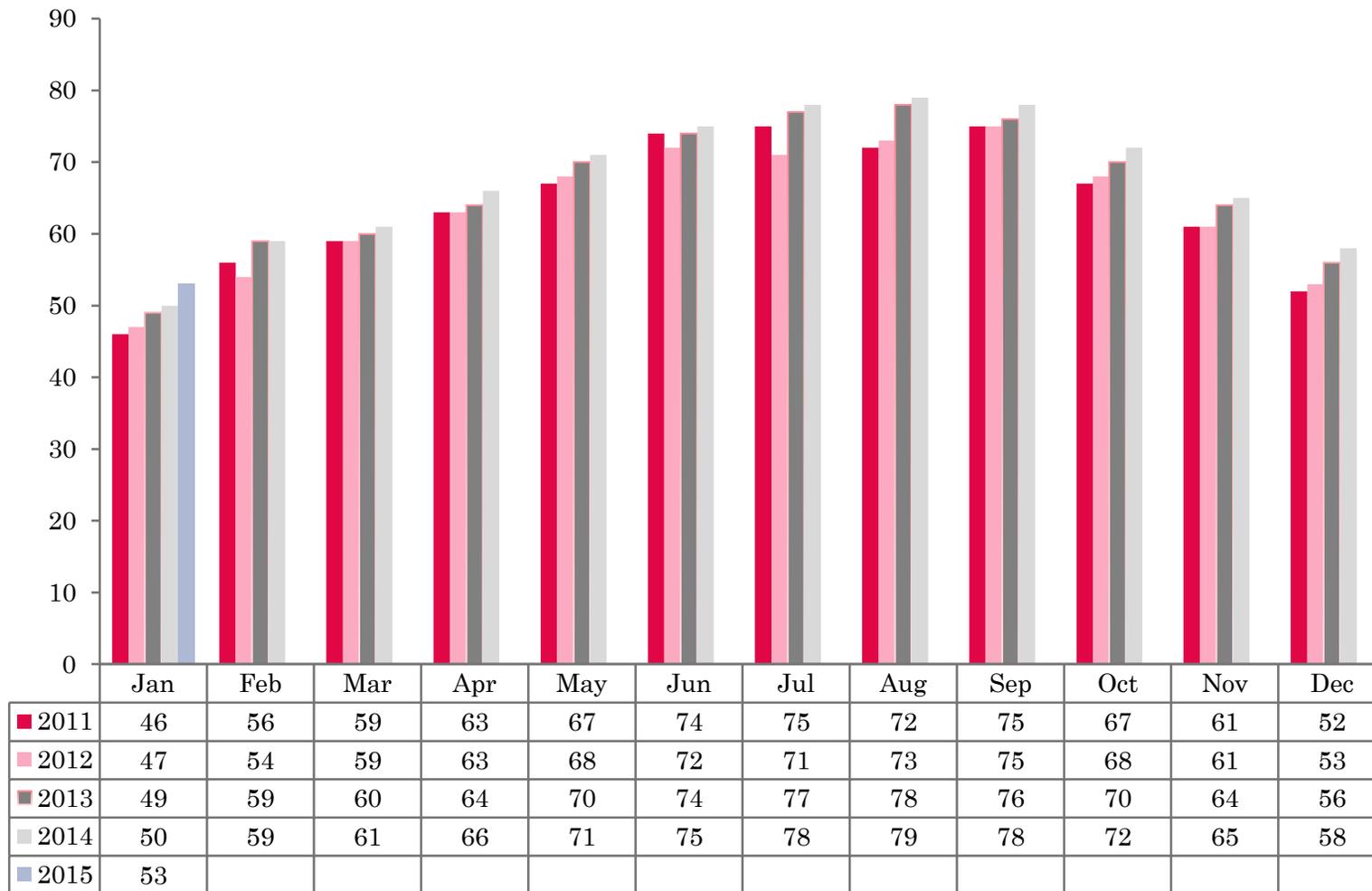
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2011 - 2015



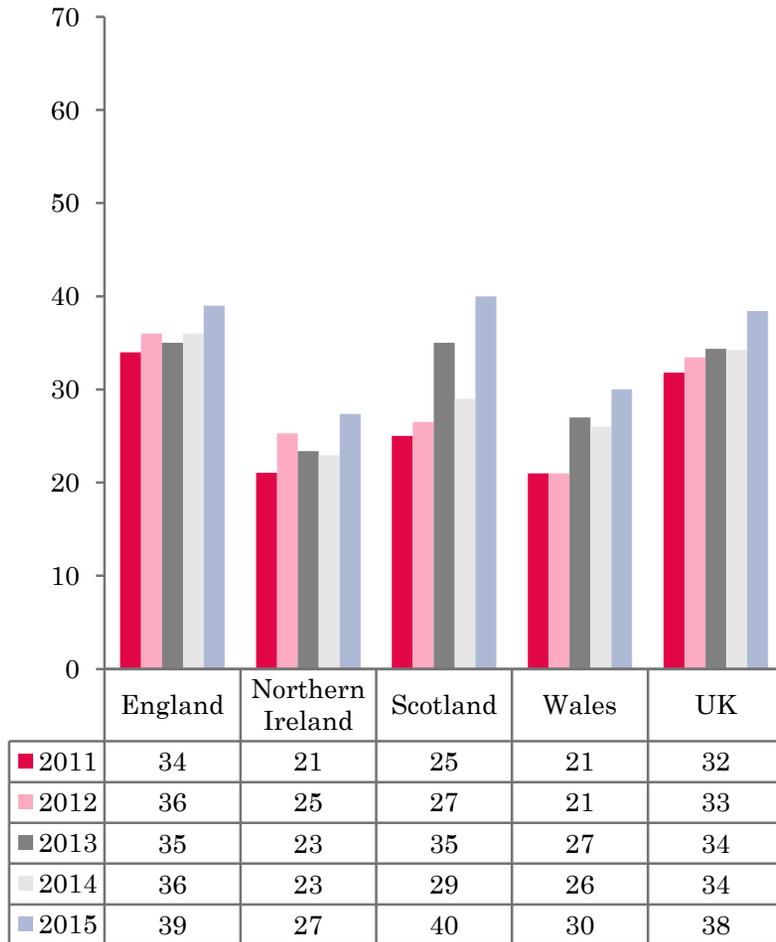
UK BEDROOM OCCUPANCY 2011 - 2015



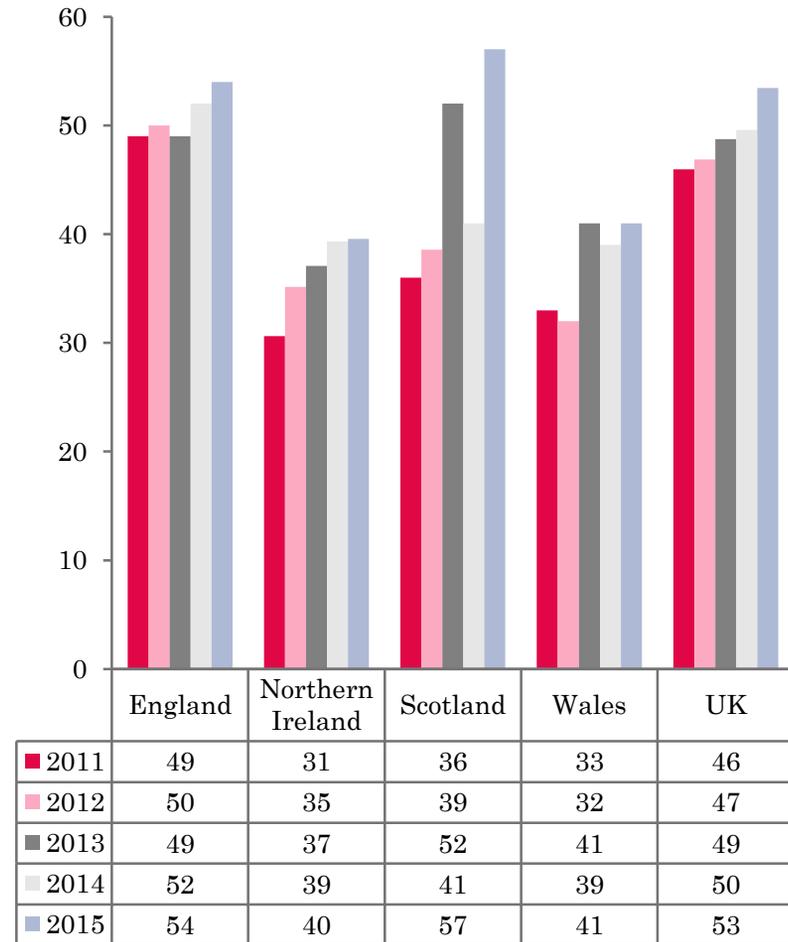
- ❖ 2,415 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (38%) and room occupancy (53%) had both increased when compared to January 2014.



NATIONAL BEDSPACE OCCUPANCY JANUARY 2011-2015



NATIONAL ROOM OCCUPANCY JANUARY 2011-2015



- During January 2015 room occupancy had increased by 3% when compared to the same period last year. Bedspace occupancy had increased by 4% on 2014 data.
- England room occupancy levels had risen by 2%, with bedspace occupancy increasing by 3% on January 2014.
- Bedspace occupancy in Northern Ireland increased by 4% when compared to the same month in 2014. Room occupancy remained flat (+1%) with January 2014.
- Wales witnessed an increase in both room and bedspace occupancy levels during January. Room occupancy was up by 2%, with bedspace occupancy levels rising by 4% when compared with the same period in 2014.
- Scotland had also increased in both room and bed occupancy in January 2015. Bedspace occupancy had increased by a significant 11%, with room occupancy faring even better with an increase of 16% on January 2014.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained static when compared with the previous year. Northern Ireland, England and Wales all remained static during January 2015 compared to the previous year. (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: January 2013 - 2015

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	35	36	39	49	52	54	1464	1894	1809
Northern Ireland	23	23	27	37	39	40	170	195	172
Scotland	35	29	40	52	41	57	275	269	239
Wales	27	26	30	41	39	41	107	109	195
UK	34	34	38	49	50	53	2016	2467	2415

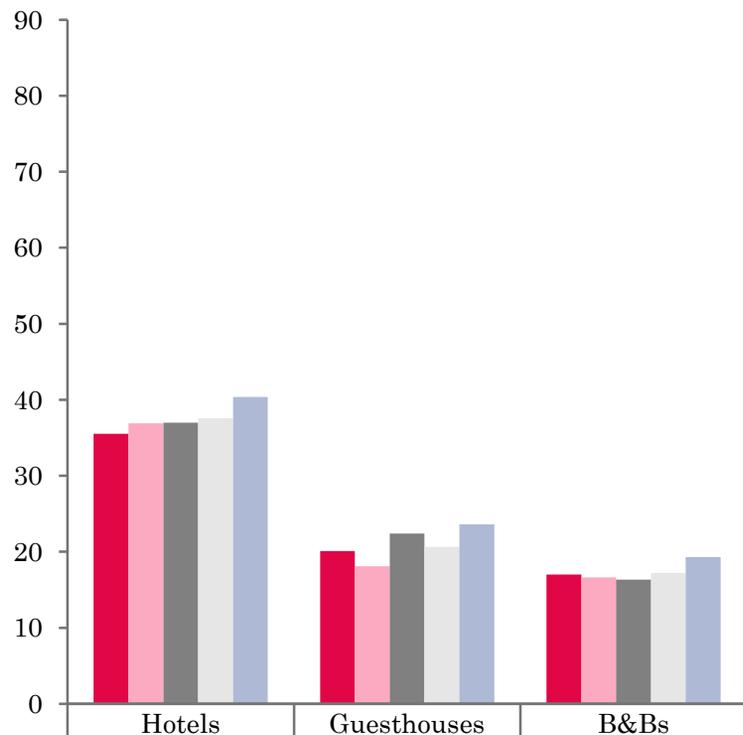
Table 2: UK/Non UK Occupancy Levels January 2013 – 2015 (see note 5a and 5b Slide 19)

	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	20	22	25	5	2	2	12	6	5	21	9	7	1464	1894	1809
Northern Ireland	15	12	17	8	11	11	29	43	23	36	48	39	170	195	172
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	275	269	239
Wales	24	20	22	1	1	1	**	**	**	4	5	3	107	109	195
UK	20	22	25	5	2	2	12	7	5	20	10	8	2016	2467	2415

** FIGURES NOT AVAILABLE

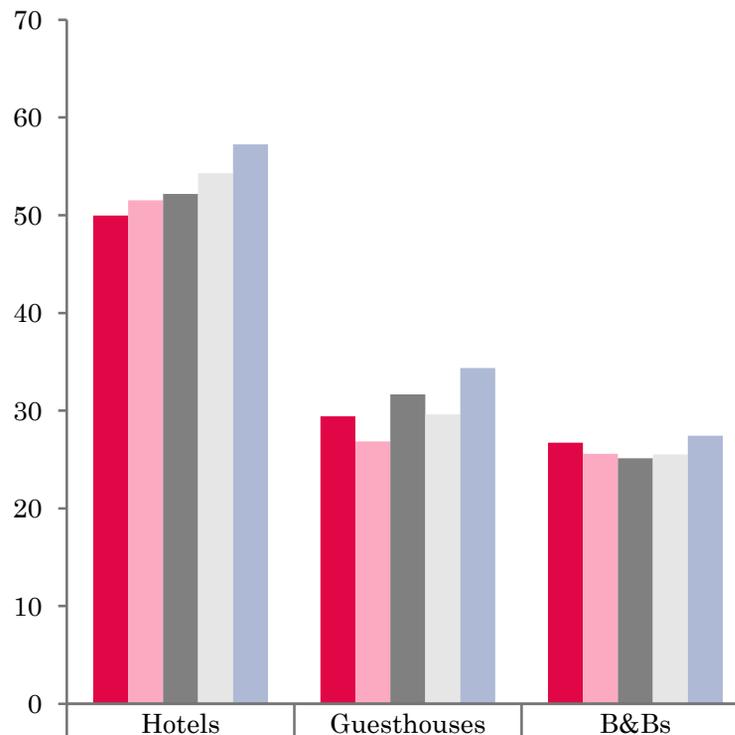


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JANUARY 2011-2015

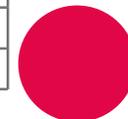


	Hotels	Guesthouses	B&Bs
2011	36	20	17
2012	37	18	17
2013	37	22	16
2014	38	21	17
2015	40	24	19

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



	Hotels	Guesthouses	B&Bs
2011	50	29	27
2012	52	27	26
2013	52	32	25
2014	54	30	26
2015	57	34	27



- Both Hotel and Guesthouses room and bed occupancy increased during January 2015. Bedspace in the hotel sector had increased by 2% with room up 3%. Guesthouse room occupancy levels were up by 4% on 2014 data with bedspace increasing by 3%. B&B's witnessed a 2% increase in bedspace occupancy with room occupancy remaining static (+1) when compared with the same period in 2014.
- Occupancy levels in all of the size bands had either increased or remained static in both measures of occupancy when compared to January 2014. The biggest movement in bedspace occupancy was in both the 11-25 and 51-100 size bandings where levels were up 3% respectively on the same period last year. Room occupancy levels in the 4-10 and 11-25 bandings had increased by 3%, the largest in room occupancy.
- Across all locations both room and bed occupancy had increased when compared to 2014 data. Seaside locations witnessed the biggest increase in both room and bed occupancy, up by 6% and 5% respectively during January 2015. Small town was up by 4% in both room and bedspace occupancy. Countryside/village witnessed an increase of 2% in room occupancy and 3% in bedspace occupancy, with City/Large town increasing by 2% in both measures of occupancy when compared to January 2014.
- The £40.00-£49.00 tariff band witnessed the biggest increase in room occupancy levels during January, up by 7% on 2014 data. Both the £20.00-£29.00 and >£60.00 also increased in room occupancy compared to 2014, with all other tariff bands either remaining static or witnessing a drop in levels. The £20.00-£29.99, £40.00-£49.00 and >£60.00 all witnessed a 3% increase in bedspace occupancy. All other tariff bands had remained static during January 2015.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	38	39	41	53	56	58	977	1466	1455
Northern Ireland	28	29	35	44	50	50	75	74	68
Scotland	36	33	40	52	48	58	204	207	193
Wales	28	30	34	43	46	47	62	63	162
UK	37	38	40	52	54	57	1318	1810	1878
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	24	22	24	33	32	35	185	168	131
Northern Ireland	20	14	15	24	23	19	6	30	15
Scotland	19	17	26	32	21	38	33	29	17
Wales	7	12	15	13	18	21	23	17	15
UK	22	21	24	32	30	34	247	244	178
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
England	18	19	22	28	28	31	302	260	223
Northern Ireland	10	4	7	15	9	11	89	91	89
Scotland	11	12	10	16	19	16	38	33	29
Wales	7	9	7	9	11	9	22	29	18
UK	16	17	19	25	26	27	451	413	359



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: January 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	33	36	38	35	37	39	42	44	47	54	57	60
Northern Ireland	27	27	33	19	22	24	37	36	42	35	38	37
Scotland	38	31	44	34	28	35	47	38	55	55	45	60
Wales	27	23	33	26	28	28	34	39	39	44	36	43
UK	33	34	38	34	35	38	42	43	48	53	54	59



Table 5: Non-UK Percentages: January 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	12	4	4	12	7	6	22	8	5	21	10	8
Northern Ireland	26	41	21	34	47	24	34	48	23	41	57	25
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	3	2	5	1	4
UK	12	5	4	13	8	6	21	9	5	21	11	8

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Table 6: Occupancy Levels by Size: January 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	13	15	15	145	17	18	21	199	23	27	29	91
Northern Ireland	17	4	4	77	18	8	11	22	17	12	19	28
Scotland	12	11	9	26	16	21	22	32	29	26	34	38
Wales	7	9	9	17	12	16	17	22	23	22	29	19
UK	13	14	14	265	17	18	21	275	24	26	29	176

Table6: Occupancy Levels by Size: January 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	34	35	37	55	37	34	36	32	41	43	45	1287
Northern Ireland	30	21	19	19	31	30	37	19	33	33	42	7
Scotland	32	29	35	47	38	38	43	39	36	39	41	57
Wales	29	34	32	22	29	35	35	6	29	33	39	109
UK	33	34	36	143	37	34	37	96	40	42	44	1460



Table 7: Occupancy Levels by Size: January 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	20	21	23	145	26	27	31	199	37	41	43	91
Northern Ireland	21	9	6	77	28	13	16	22	28	22	28	28
Scotland	16	17	15	26	27	28	32	32	40	37	46	38
Wales	10	10	11	17	16	22	24	22	35	32	39	19
UK	19	20	21	375	26	27	30	275	37	40	43	176

Table 7: Occupancy Levels by Size: January 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	49	50	49	55	51	51	50	32	59	62	64	1287
Northern Ireland	44	38	40	19	51	42	46	19	41	59	60	7
Scotland	46	43	50	47	54	55	60	39	54	57	59	57
Wales	43	49	43	22	43	50	42	6	47	59	57	109
UK	48	49	49	143	51	51	51	96	57	61	63	1460



Table 8: Occupancy Levels by Location Types: January 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	22	24	29	153	42	45	46	1003	30	32	34	368	25	27	27	284
Northern Ireland	19	16	16	39	28	29	37	53	17	17	17	52	13	9	11	28
Scotland	28	20	34	20	36	38	40	114	37	20	34	49	30	23	48	56
Wales	30	30	31	26	31	35	37	8	23	17	17	13	20	20	20	55
UK	23	24	29	238	40	43	45	1178	30	29	33	482	25	26	29	423

Table 8: Occupancy Levels by Location Types: January 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	36	40	44	153	57	62	64	1003	46	48	51	368	38	40	40	284
Northern Ireland	26	23	22	39	46	49	52	53	26	28	23	52	19	17	15	28
Scotland	44	28	50	20	54	56	60	114	47	33	48	49	43	31	50	56
Wales	39	38	37	26	49	60	51	8	40	30	30	13	31	28	28	55
UK	37	38	44	238	56	61	63	1178	45	45	49	482	38	38	40	423

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 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	**	**	**	**	10	9	12	23	13	14	12	75
Northern Ireland	**	**	**	**	6	6	4	27	14	3	10	43
Scotland	**	**	**	**	21	15	23	5	26	14	16	27
Wales	**	**	**	**	7	7	8	5	11	12	13	18
UK	**	**	**	**	11	10	13	60	15	14	13	163

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 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	18	20	22	104	25	28	28	74	38	39	41	1533
Northern Ireland	13	12	16	38	18	30	40	16	29	29	35	48
Scotland	27	21	34	26	33	35	31	22	37	35	41	159
Wales	16	16	17	11	31	28	25	16	29	32	36	145
UK	19	20	23	179	26	29	29	128	37	38	41	1885

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 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	**	**	**	**	19	17	20	23	20	25	20	75
Northern Ireland	**	**	**	**	13	11	7	27	21	8	13	43
Scotland	**	**	**	**	29	19	43	5	42	25	22	27
Wales	**	**	**	**	11	11	15	5	16	16	19	18
UK	**	**	**	**	20	17	23	60	23	24	20	163

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 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	26	27	34	104	37	36	37	74	53	56	57	1533
Northern Ireland	21	24	25	38	26	48	50	16	46	48	51	48
Scotland	45	33	48	26	47	50	47	22	54	51	59	159
Wales	24	28	26	11	44	37	32	16	44	50	50	145
UK	28	28	35	179	38	38	38	128	53	55	57	1885

** 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)

