



# UNITED KINGDOM OCCUPANCY SURVEY

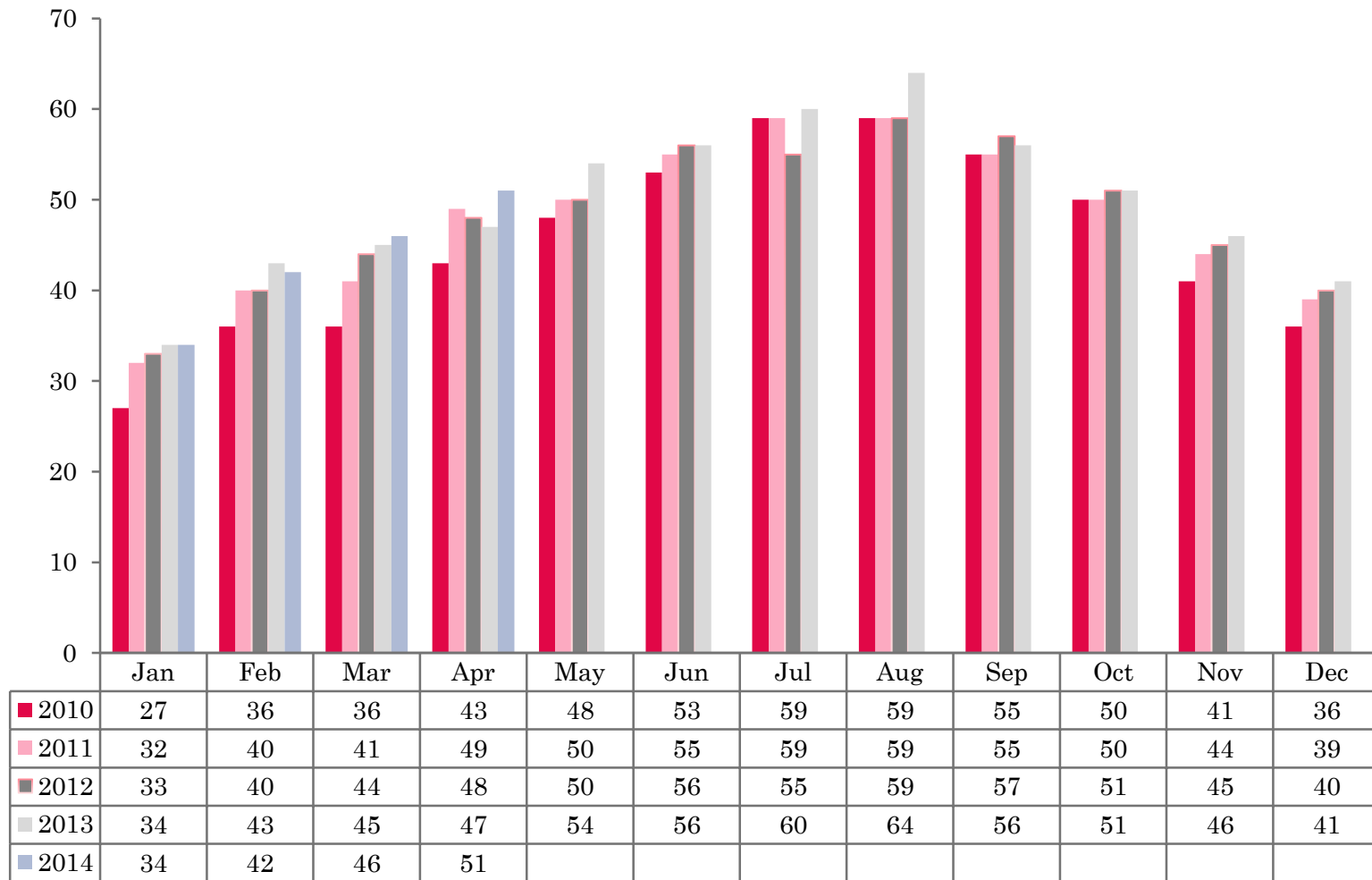
Serviced Accommodation Summary Report  
April 2014

# UK OCCUPANCY SURVEY

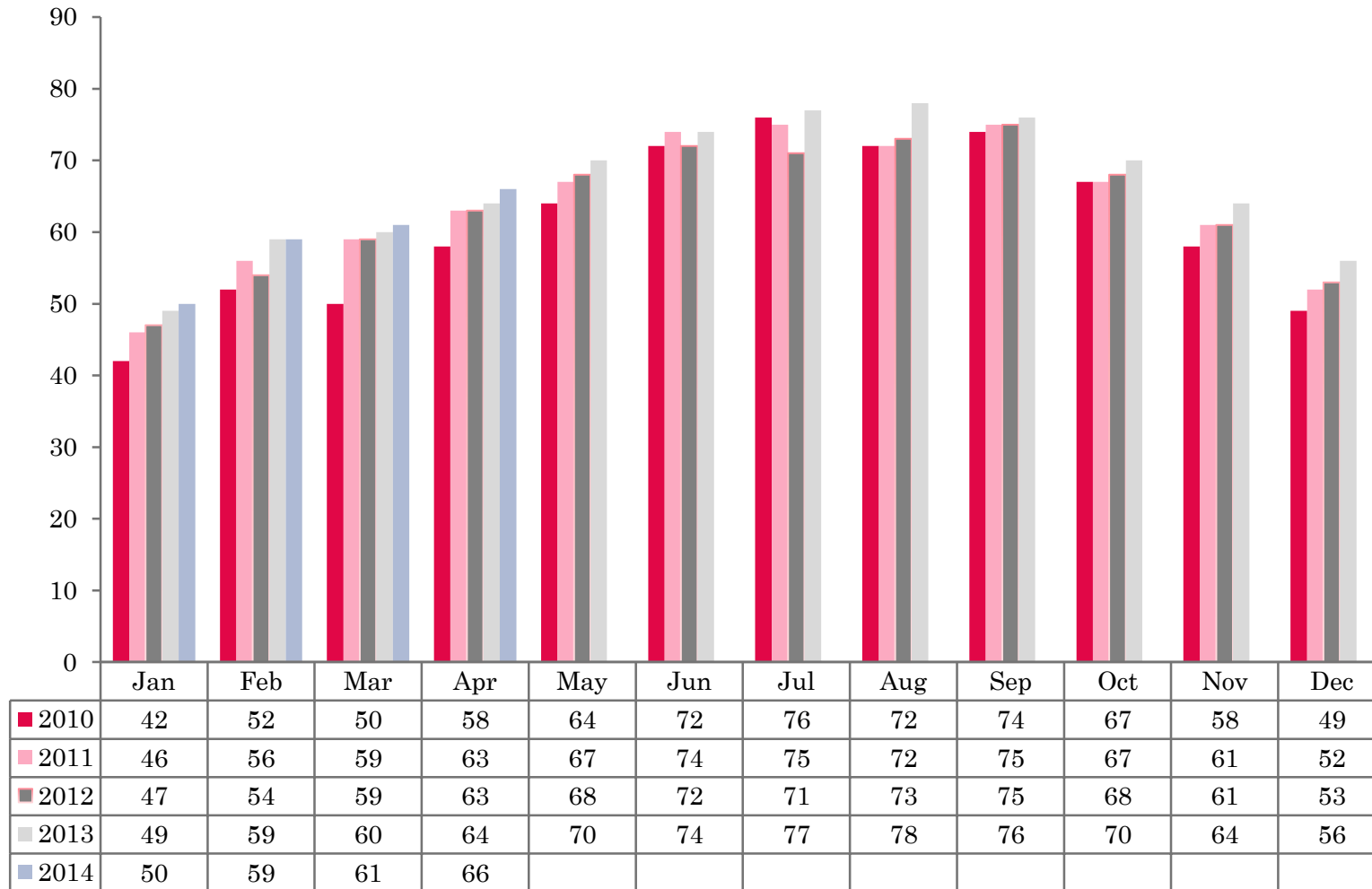
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2010 - 2014



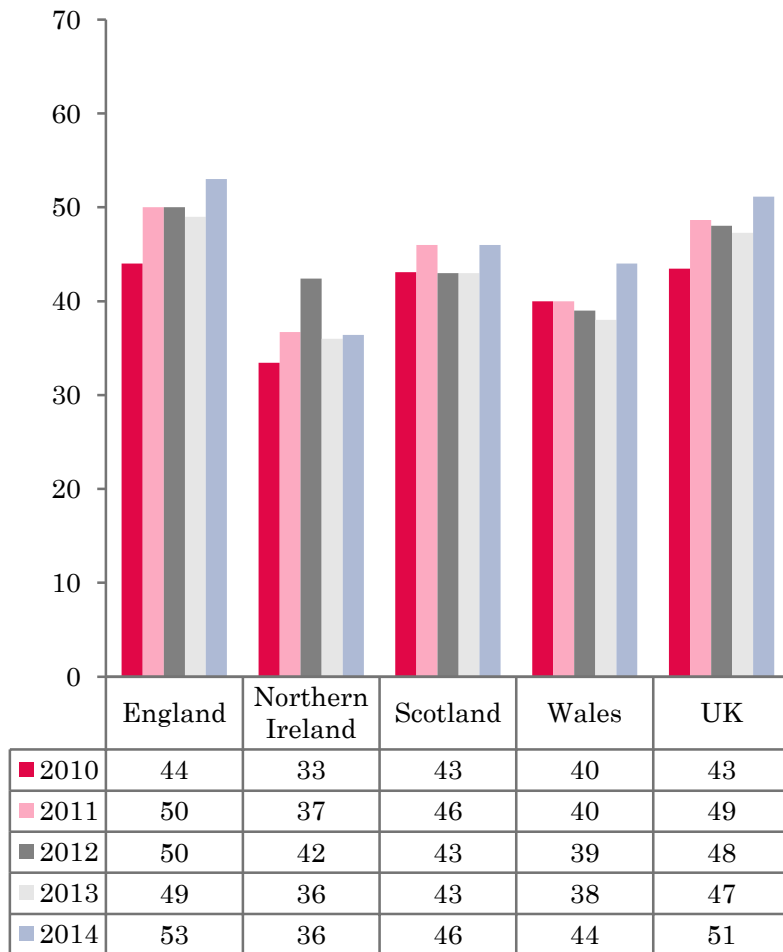
# UK BEDROOM OCCUPANCY 2010 - 2014



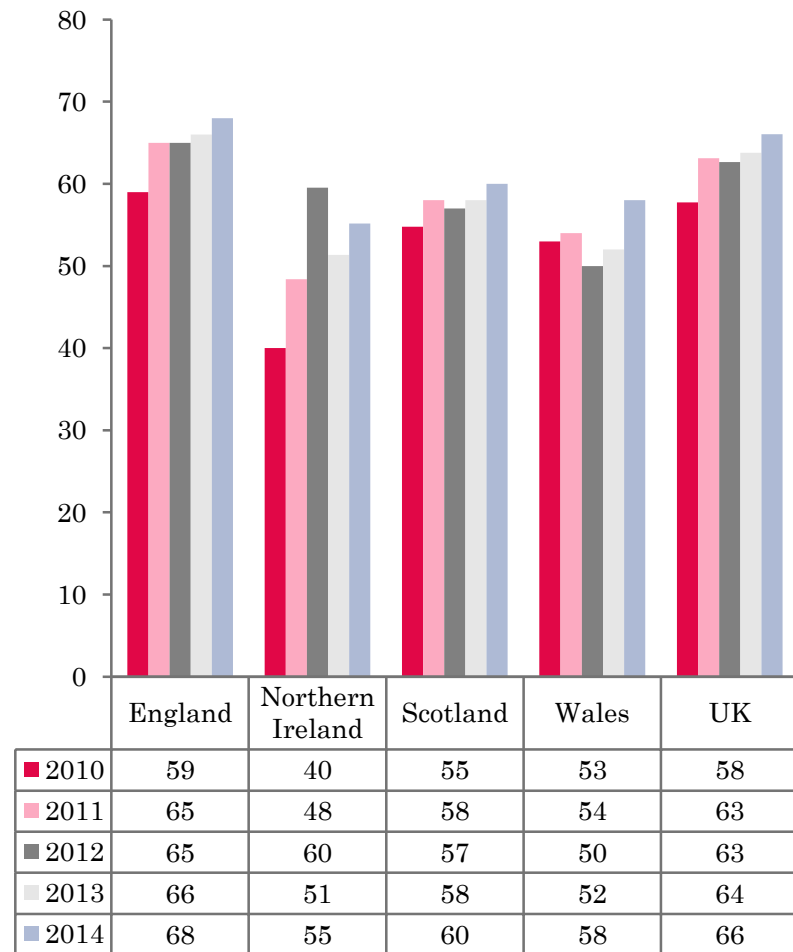
- ❖ 2,518 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ Both UK bedspace (51%) and room occupancy (66%) had increased when compared to April 2013.



## NATIONAL BEDSPACE OCCUPANCY APRIL 2010-2014



## NATIONAL ROOM OCCUPANCY APRIL 2010-2014



- Bedspace occupancy was at its highest in England (53%) during April 2014, slightly higher than UK levels during this month. Northern Ireland (36%) was again the lowest.
- In the UK during April 2014, both room and bedspace occupancy had increased when compared to the previous year, witnessing a 4% rise in bedspace occupancy and 2% increase in room occupancy.
- Room occupancy in Northern Ireland increased during April 2014, up by 4 percentage points compared to the same month in 2013. Bed occupancy remained on par with the previous year.
- Both room and bedspace occupancy levels increased significantly in Wales during April. Both measures of occupancy increased by 6% compared to the same period in 2013.
- Scotland occupancy levels had also increased in April when compared to 2013. Bedspace had increased by 3% and room up 2%.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained flat when compared with April 2013 (-1 percentage point). England mirrored the UK, whilst both Northern Ireland and Wales remained static (+1 percentage point) in line with the previous year. (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) Slide 19).

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**Table 1: Occupancy Levels: April 2012 - 2014**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	50	49	53	65	66	68	1624	1542	1937
Northern Ireland	42	36	36	60	51	55	182	162	168
Scotland	43	43	46	57	58	60	321	320	297
Wales	39	38	44	50	52	58	143	129	116
<b>UK</b>	48	47	51	63	64	66	2270	2153	2518

**Table 2: UK/Non UK Occupancy Levels April 2012 – 2014 (see note 5a and 5b Slide 19)**

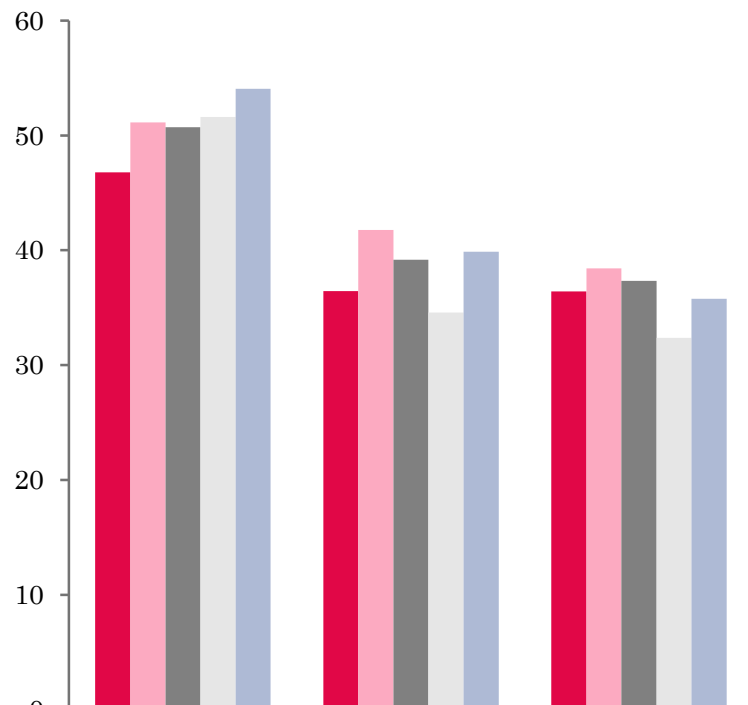
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	37	36	37	6	5	4	12	10	8	15	12	10	1624	1542	1937
Northern Ireland	27	19	19	15	17	18	32	41	43	36	48	49	182	162	168
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	321	320	297
Wales	35	33	37	2	3	4	**	**	**	6	7	9	143	129	116
<b>UK</b>	37	35	37	6	5	4	13	11	9	15	13	11	2270	2153	2518

\*\* FIGURES NOT AVAILABLE



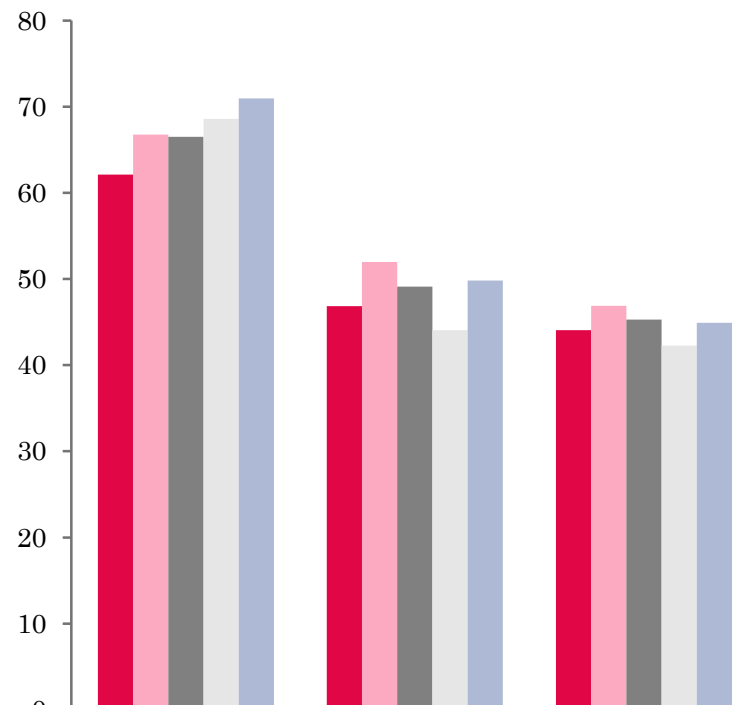


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2010-2014



	Hotels	Guesthouses	B&Bs
2010	47	36	36
2011	51	42	38
2012	51	39	37
2013	52	35	32
2014	54	40	36

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2010-2014



	Hotels	Guesthouses	B&Bs
2010	62	47	44
2011	67	52	47
2012	67	49	45
2013	69	44	42
2014	71	50	45



- Both room and bedspace occupancy levels increased across all establishment types in April 2014. Guesthouse accommodation witnessed the biggest increase in both measures of occupancy, up 5% in bedspace and 6% in room occupancy compared to April 2013. (Table 3).
- Bedspace occupancy in all six size bandings increased in April when compared with the previous year's results. The largest of these was in the 11-25 size banding where bedspace occupancy went up by 8%. Room occupancy in the 11-25 size band also witnessed the biggest increase, up 10 percentage points compared with last years results. The rest of the size bandings also increased, with only the 51-100 banding falling slightly (by 2 percentage points).
- Both room and bed occupancy levels across all locations increased in April 2014 when compared to the same period last year. The most significant of these in bed occupancy, was in the small town location where levels increased by 6 percentage points. Seaside locations saw the most notable increase in room occupancy, up 5 percentage points on April 2013. (Table 8).
- An increase in both measures of occupancy was found across all tariff bands in April 2014. The largest of these was in the lowest priced tariff band of £20.00-£29.00, where an 8 percentage point increase was found. The £30.00-£39.00 tariff band witnessed the largest increase in room occupancy, up by 13 pp when compared to the same period in 2013.



**Table 3: Occupancy Levels by Type of Establishment: April 2012 - 2014**

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	52	53	55	68	70	72	1003	976	1471
Northern Ireland	50	42	46	69	60	66	62	56	71
Scotland	48	48	52	63	65	68	216	220	209
Wales	43	45	49	57	61	66	72	64	65
<b>UK</b>	51	52	54	67	69	71	1353	1316	1816
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	41	36	42	52	46	53	241	221	184
Northern Ireland	25	32	30	37	41	37	28	21	19
Scotland	38	32	35	44	39	41	45	44	40
Wales	26	22	26	32	31	33	28	27	20
<b>UK</b>	39	35	40	49	44	50	342	313	263
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	40	34	38	48	45	48	380	345	282
Northern Ireland	16	14	11	25	23	16	91	85	78
Scotland	29	31	30	39	37	37	60	56	48
Wales	32	19	29	35	24	33	43	38	31
<b>UK</b>	37	32	36	45	42	45	574	524	439



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: April 2012 – 2014 (see notes 5a & 5b Slide 19)**

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	53	50	56	45	46	50	64	61	67	65	67	69
Northern Ireland	42	41	46	34	35	35	57	52	61	56	53	56
Scotland	47	47	0	41	43	0	55	55	0	58	60	0
Wales	44	42	50	34	35	37	53	51	63	48	52	54
<b>UK</b>	51	49	55	43	45	49	62	59	67	63	65	68



**Table 5: Non-UK Percentages: April 2012 – 2014 (see notes 5a & 5b Slide 19)**

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	11	8	6	13	12	10	14	12	8	16	14	12
Northern Ireland	32	39	42	35	36	43	36	49	46	39	47	47
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	5	9	6	9	10
<b>UK</b>	12	9	7	14	13	11	14	12	9	16	15	13

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: April 2012 - 2014**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	32	30	34	184	36	33	37	262	42	37	46	107
Northern Ireland	12	8	10	63	26	22	21	25	31	26	31	33
Scotland	25	23	25	42	37	36	37	58	45	44	49	47
Wales	20	19	28	28	35	27	34	33	39	35	45	21
<b>UK</b>	30	28	32	317	36	33	36	378	42	38	46	208

**Table6: Occupancy Levels by Size: April 2012 - 2014**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	49	52	53	62	57	52	56	37	52	54	57	1285
Northern Ireland	32	25	40	18	45	43	47	19	61	49	47	10
Scotland	49	47	48	52	51	53	56	43	53	53	59	55
Wales	47	49	49	19	48	45	69	9	38	51	42	6
<b>UK</b>	49	51	52	151	55	52	56	108	51	54	56	1356



**Table 7: Occupancy Levels by Size: April 2012 – 2014**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 -3 Rooms</b>				<b>4 – 10 Rooms</b>				<b>11 – 25 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	39	38	41	184	45	44	47	262	55	50	61	107
Northern Ireland	22	15	14	63	34	28	19	25	44	39	43	33
Scotland	34	30	32	42	46	44	43	58	55	55	60	47
Wales	25	24	34	28	40	33	41	33	49	44	57	21
<b>UK</b>	37	36	39	375	45	43	46	378	54	50	60	208

**Table 7: Occupancy Levels by Size: April 2012 - 2014**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 – 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	65	67	68	62	69	69	65	37	73	76	78	1285
Northern Ireland	60	41	61	18	62	61	64	19	81	54	73	10
Scotland	61	63	63	52	68	71	74	43	73	75	79	55
Wales	62	64	63	19	67	65	72	9	55	74	75	6
<b>UK</b>	64	66	67	151	69	69	67	108	72	75	78	1356



**Table 8: Occupancy Levels by Location Types: April 2012 - 2014**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	41	42	47	196	56	56	59	1008	43	42	47	390	45	44	44	343
Northern Ireland	37	31	34	41	50	42	45	47	28	29	26	55	17	20	18	25
Scotland	41	44	43	288	49	51	0	0	38	36	0	0	38	36	0	0
Wales	44	44	52	31	34	50	42	10	42	37	52	15	36	27	36	60
<b>UK</b>	41	42	46	556	53	55	58	1065	42	41	47	460	43	41	43	428

**Table 8: Occupancy Levels by Location Types: April 2012 - 2014**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	53	53	58	196	74	74	78	1008	59	61	64	390	55	57	58	343
Northern Ireland	49	40	42	41	70	62	67	47	41	41	38	55	30	24	34	25
Scotland	53	52	61	288	67	70	0	0	51	51	0	0	46	46	0	0
Wales	55	55	60	31	50	69	73	10	58	62	55	15	43	35	47	60
<b>UK</b>	53	53	58	556	71	73	77	1065	57	59	63	460	52	54	57	428



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2012 – 2014 (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>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	**	**	**	**	22	19	27	29	30	21	30	112
Northern Ireland	**	**	**	**	13	7	4	14	19	17	15	45
Scotland	**	**	**	**	30	29	42	36	30	29	54	119
Wales	**	**	**	**	14	22	9	3	35	24	26	31
<b>UK</b>	**	**	**	**	22	20	28	82	30	22	33	307

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2012 – 2014 (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>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	40	38	42	140	46	38	47	83	51	52	55	1540
Northern Ireland	32	21	30	33	33	36	44	25	51	42	43	51
Scotland	37	35	39	58	44	45	42	84	50	51	51	288
Wales	34	20	39	20	47	48	46	17	42	45	48	45
<b>UK</b>	39	36	41	251	46	40	46	209	50	51	54	1924

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2012 – 2014 (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>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	**	**	**	**	32	36	37	29	38	30	40	112
Northern Ireland	**	**	**	**	26	14	6	14	29	22	18	45
Scotland	**	**	**	**	45	37	50	36	43	39	73	119
Wales	**	**	**	**	18	35	12	3	43	31	32	31
<b>UK</b>	**	**	**	**	33	36	37	82	39	31	44	307

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2012 – 2014 (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>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	50	46	53	140	57	46	56	83	68	70	72	1540
Northern Ireland	45	25	43	33	43	56	64	25	70	60	65	51
Scotland	47	47	55	58	56	58	49	84	61	68	60	288
Wales	44	36	56	20	57	57	58	17	57	61	67	45
<b>UK</b>	49	45	53	251	57	49	55	209	66	69	70	1924

\*\* 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)

