



# UNITED KINGDOM OCCUPANCY SURVEY

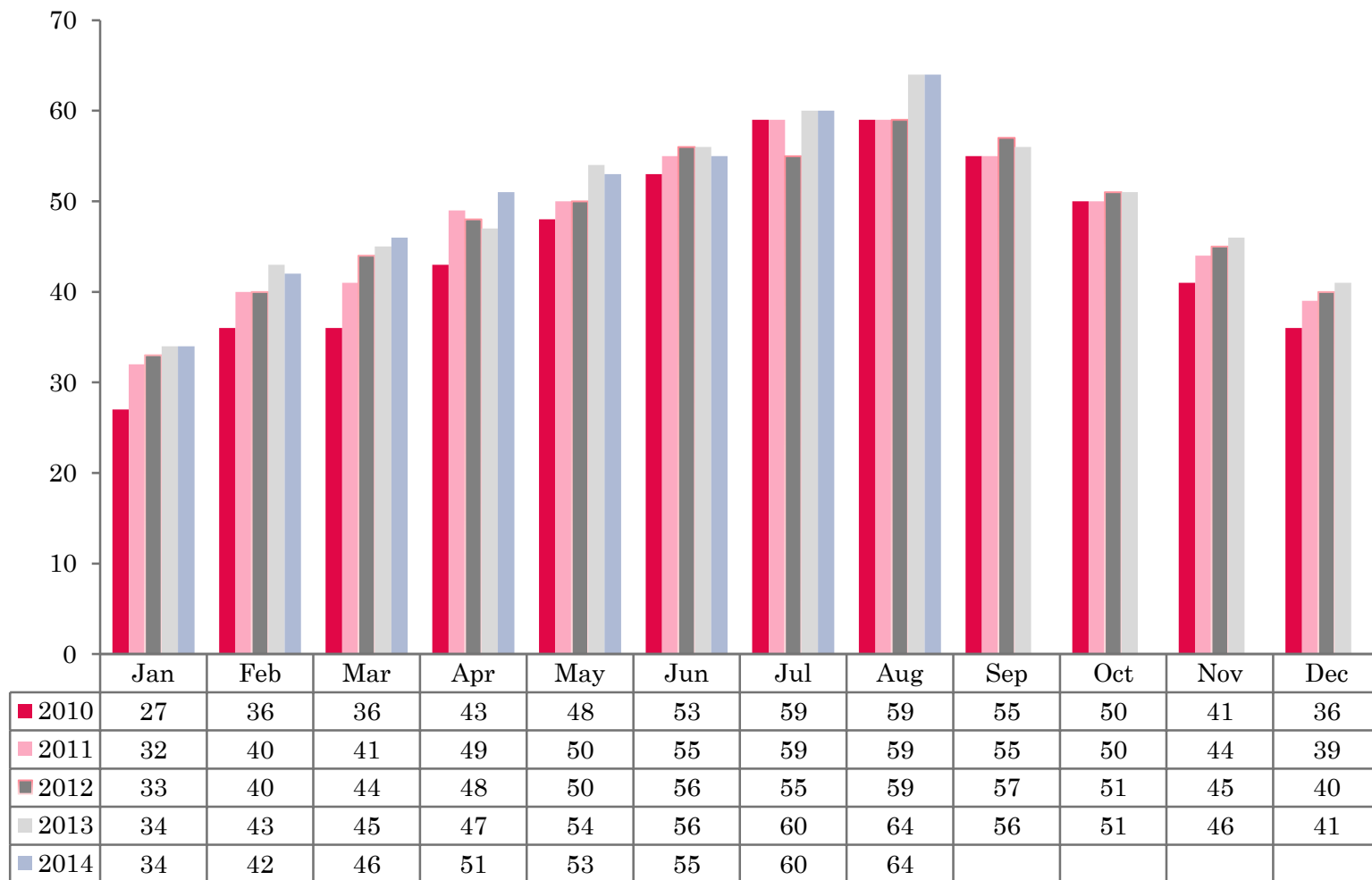
Serviced Accommodation Summary Report  
August 2014

# 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



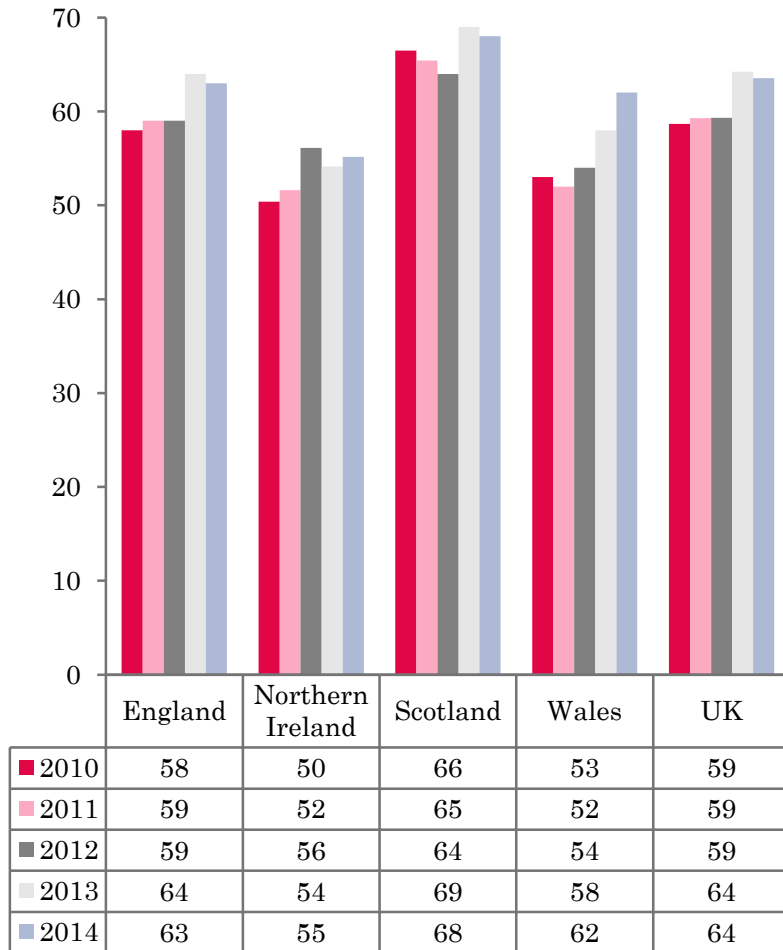
# UK BEDROOM OCCUPANCY 2010 - 2014



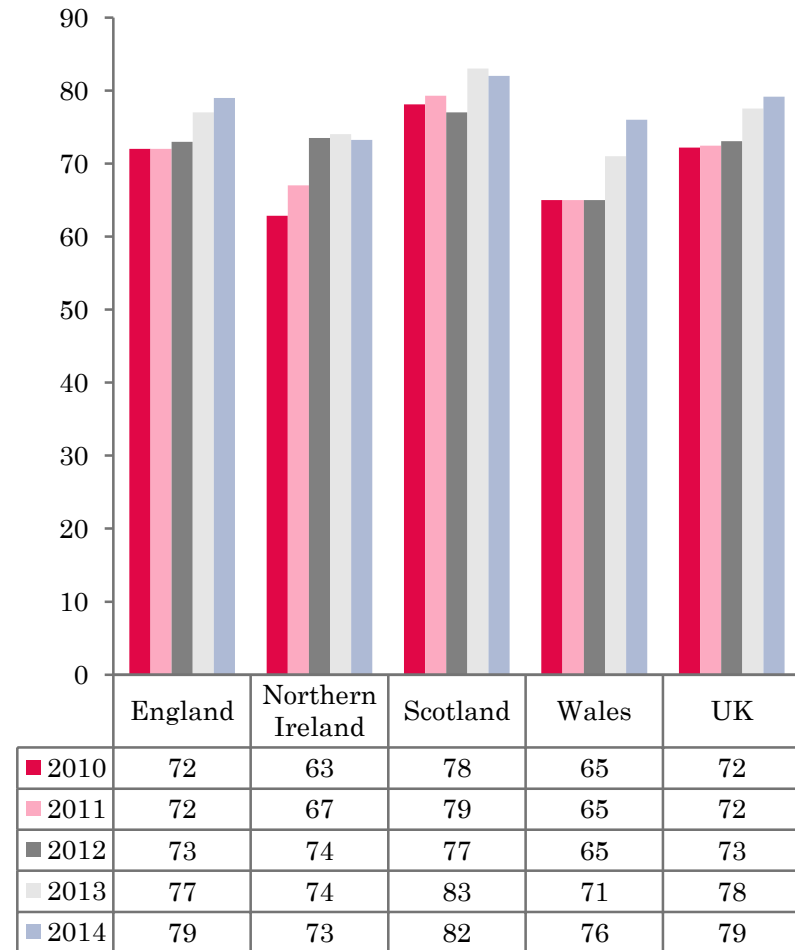
- ❖ 2,487 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (64%) and room occupancy (79%) had remained flat when compared to August 2013.



## NATIONAL BEDSPACE OCCUPANCY AUGUST 2010-2014



## NATIONAL ROOM OCCUPANCY AUGUST 2010-2014



- In the UK during August 2014, both room and bedspace occupancy saw little change with room occupancy fairly flat (+1%) and bedspace occupancy remaining static compared to the same month in 2013.
- Across England as a whole, bedspace occupancy remained on a par with August 2013 (-1%). Room occupancy fared better, up from 77% in August 2013 to 79% in August this year.
- Northern Ireland saw very little change, with room occupancy down 1% during August 2014, falling to 73%, whilst bed occupancy increased slightly, from 54% in 2013 to 55%.
- Wales witnessed a significant rise in both room and bedspace occupancy levels during August. Room occupancy went up by 5 percentage points, with bedspace occupancy up by 4% when compared with the same period in 2013.
- Occupancy levels in Scotland for both room and bedspace remained flat during August 2014 when compared to the previous year, (-1%).
- Across the UK as a whole, bedspace occupancy by non-UK residents had decreased marginally (-1%) when compared with August 2013. Northern Ireland witnessed a 4 percentage point increase whereas England occupancy levels fell by 2% when compared to 2014 data. Wales saw a marginal increase during August 2014, up by 1 percentage point. (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: August 2012 - 2014**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	59	64	63	73	77	79	1587	2013	1885
Northern Ireland	56	54	55	74	74	73	168	183	180
Scotland	64	69	68	77	83	82	319	314	303
Wales	54	58	62	65	71	76	144	137	119
<b>UK</b>	59	64	64	73	78	79	2218	2647	2487

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

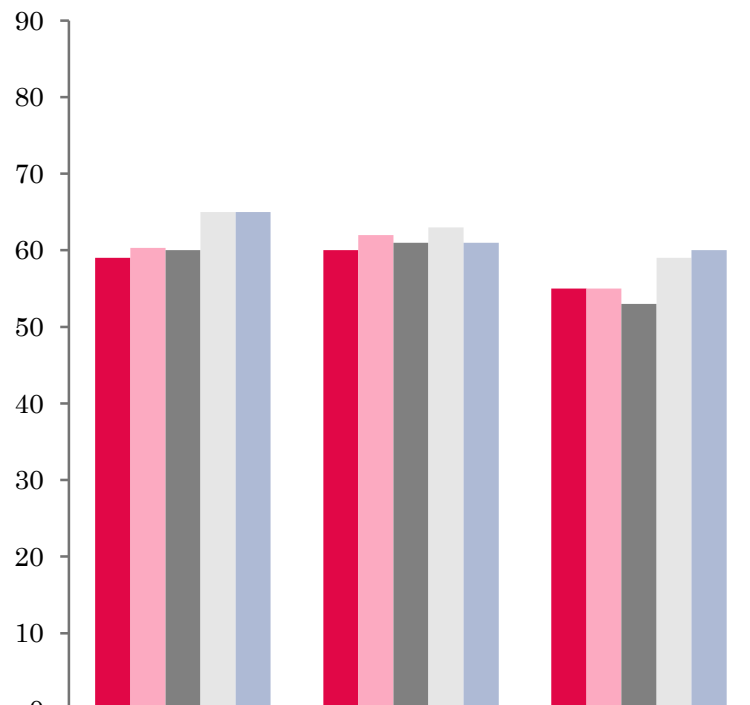
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	52	54	54	8	9	7	9	14	11	13	14	12	1587	2013	1885
Northern Ireland	30	28	25	26	26	30	35	49	45	47	48	54	168	183	180
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	319	314	303
Wales	50	54	57	5	6	7	**	**	**	9	10	10	144	137	119
<b>UK</b>	51	53	53	8	9	8	10	15	12	13	15	13	2218	2647	2487

\*\* FIGURES NOT AVAILABLE



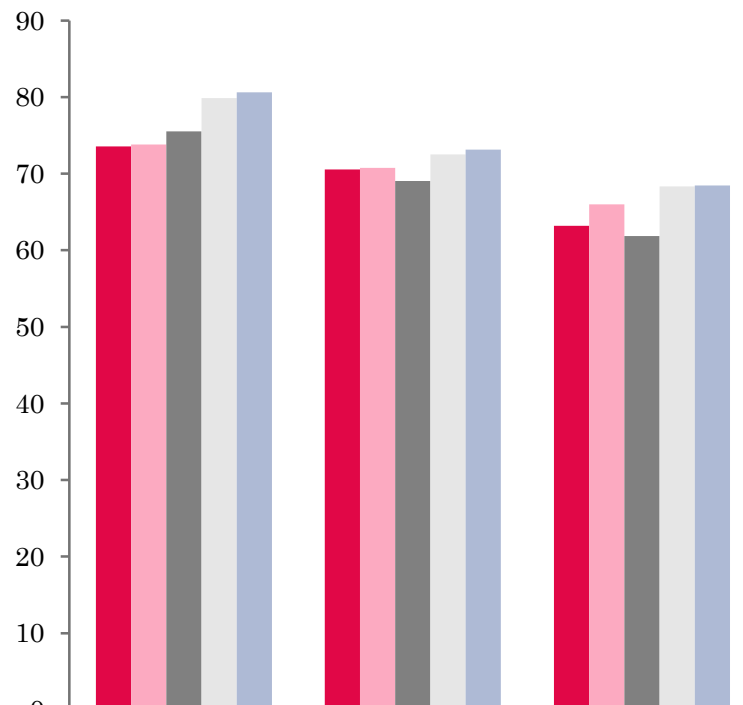


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION AUGUST 2010-2014



	Hotels	Guesthouses	B&Bs
2010	59	60	55
2011	60	62	55
2012	60	61	53
2013	65	63	59
2014	65	61	60

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



	Hotels	Guesthouses	B&Bs
2010	74	71	63
2011	74	71	66
2012	76	69	62
2013	80	73	68
2014	81	73	68



- Only B&B establishments had increased in bedspace occupancy in August 2014 when compared to the same period the previous year (+1%), guesthouses had decreased (-2%) with Hotels remaining static with 2013 data. Hotels witnessed a marginal increase in room occupancy up by 1%, with both guesthouses and B&B's remaining on a par with August 2013. (Table 3).
- Both the 4-10 and >100 size bands had increased in both measures of occupancy when compared to 2013. However the largest increase in bedspace occupancy was in the 51-100 size banding up 5% on the same period last year. The largest increase in room occupancy was in the >100 size banding, where levels increased 3% on the same period last year.
- Only City/Large Town bedspace occupancy remained static at 64% in August 2014, whereas all other locations saw a small fall in bedspace occupancy levels when compared to the same period in 2013. Both Seaside and City/Large Town locations saw an improvement in room occupancy levels this month, up 1% and 2% respectively. Small town location decreased by 2%, whilst countryside/village remained static when compared with 2013.
- Both the £20.00-£29.99 and >£60.00 tariff bands increased in both measures of occupancy compared to the same period in 2013. The £20.00-£29.99 tariff band increased 4% in bedspace and 3% in room occupancy, the >£60.00 tariff band increased by 1% in both room and bedspace occupancy. All other size bandings witnessed a slight downturn in occupancy levels or had remained static when compared to August 2013.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	59	65	64	75	79	80	987	1483	1454
Northern Ireland	61	59	61	81	82	81	60	78	79
Scotland	65	69	68	80	85	84	210	213	209
Wales	57	61	67	70	77	80	71	72	69
<b>UK</b>	60	65	65	76	80	81	1328	1846	1811
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	61	63	61	69	73	74	231	207	168
Northern Ireland	59	47	42	70	61	51	14	15	20
Scotland	66	70	68	75	78	77	50	44	39
Wales	47	47	48	57	54	58	29	26	19
<b>UK</b>	61	63	61	69	73	73	324	292	246
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	54	58	60	63	68	68	369	323	263
Northern Ireland	34	34	41	46	44	54	93	90	81
Scotland	59	68	66	66	75	76	59	57	55
Wales	41	54	52	45	64	59	44	39	31
<b>UK</b>	53	59	60	62	68	68	565	509	430



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: August 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	64	67	66	54	58	59	74	78	78	71	76	78
Northern Ireland	59	62	62	50	53	57	75	79	76	70	75	76
Scotland	67	71	70	61	66	65	77	82	81	78	84	83
Wales	60	64	64	49	53	59	68	74	76	63	70	75
<b>UK</b>	64	67	66	55	59	60	74	78	78	71	77	79



**Table 5: Non-UK Percentages: August 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	10	11	9	13	16	13	14	14	10	15	18	13
Northern Ireland	34	50	43	39	56	47	49	49	54	52	52	58
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	9	9	10	9	10	11
<b>UK</b>	11	12	10	14	17	14	14	15	11	15	18	14

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: August 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	48	53	54	180	58	61	65	236	56	62	57	97
Northern Ireland	26	31	39	63	53	45	40	28	47	47	43	37
Scotland	57	66	60	45	64	70	71	58	65	68	70	47
Wales	40	51	51	29	51	56	56	32	53	52	61	22
<b>UK</b>	48	54	54	317	58	62	65	354	57	62	59	203

**Table6: Occupancy Levels by Size: August 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	61	69	67	57	65	67	73	34	58	61	63	1281
Northern Ireland	55	39	66	22	62	60	64	19	66	68	60	11
Scotland	68	69	68	50	66	70	65	44	65	68	70	59
Wales	57	63	69	20	59	67	76	10	56	56	67	5
<b>UK</b>	62	68	67	149	65	67	72	107	59	62	64	1356



**Table 7: Occupancy Levels by Size: August 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	56	61	61	180	66	71	73	236	66	73	71	97
Northern Ireland	40	41	53	63	61	55	51	28	67	64	56	37
Scotland	63	74	71	45	73	78	80	58	77	81	82	47
Wales	42	60	55	29	61	64	68	32	63	63	68	22
<b>UK</b>	56	62	62	375	67	71	73	354	67	74	72	203

**Table 7: Occupancy Levels by Size: August 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	73	80	77	57	77	78	78	34	77	80	83	1281
Northern Ireland	73	69	78	22	79	82	82	19	88	90	85	11
Scotland	82	85	87	50	81	86	80	44	85	91	90	59
Wales	70	77	79	20	79	81	83	10	69	83	93	5
<b>UK</b>	74	80	79	149	78	79	79	107	78	82	85	1356



**Table 8: Occupancy Levels by Location Types: August 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	60	76	75	189	58	64	64	1000	52	56	54	374	60	65	62	322
Northern Ireland	58	58	63	43	63	58	61	54	36	41	40	59	34	38	35	24
Scotland	67	73	67	38	66	70	69	121	55	59	60	62	65	71	73	82
Wales	63	70	74	33	49	55	55	8	48	55	66	15	52	51	51	63
<b>UK</b>	61	75	73	303	59	64	64	1183	52	56	55	510	60	65	63	491

**Table 8: Occupancy Levels by Location Types: August 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	73	79	82	189	75	81	83	1000	71	73	71	374	69	76	75	322
Northern Ireland	77	75	76	43	81	81	82	54	54	55	50	59	41	47	50	24
Scotland	79	84	77	38	83	88	88	121	67	76	74	62	74	80	82	82
Wales	73	81	81	33	65	78	87	8	68	70	78	15	58	61	62	63
<b>UK</b>	74	80	81	303	76	82	84	1183	70	73	71	510	68	75	75	491



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	**	**	**	**	48	51	57	29	50	52	52	104
Northern Ireland	**	**	**	**	28	37	27	16	44	38	50	51
Scotland	**	**	**	**	49	49	47	9	59	65	61	44
Wales	**	**	**	**	29	39	41	4	46	49	50	29
<b>UK</b>	**	**	**	**	46	50	54	58	51	54	53	228

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	61	65	65	126	57	61	60	76	59	63	63	1519
Northern Ireland	54	43	47	30	56	52	57	23	61	61	60	60
Scotland	64	68	61	44	63	74	72	28	67	71	72	178
Wales	51	45	40	19	62	59	76	16	58	66	71	51
<b>UK</b>	61	64	63	219	58	63	63	143	60	64	65	1808

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) August 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	**	**	**	**	58	62	66	29	59	64	63	104
Northern Ireland	**	**	**	**	47	48	53	16	51	56	57	51
Scotland	**	**	**	**	56	59	51	9	70	77	72	44
Wales	**	**	**	**	35	45	58	4	55	59	59	29
<b>UK</b>	**	**	**	**	56	60	63	58	60	66	64	228

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) August 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	70	76	74	126	68	70	72	76	74	79	80	1519
Northern Ireland	69	67	61	30	68	66	75	23	82	83	81	60
Scotland	75	79	73	44	78	88	87	28	81	86	87	178
Wales	61	64	65	19	70	67	80	16	71	81	84	51
<b>UK</b>	70	76	73	219	70	72	75	143	75	80	81	1808

\*\* 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)

