



UNITED KINGDOM OCCUPANCY SURVEY

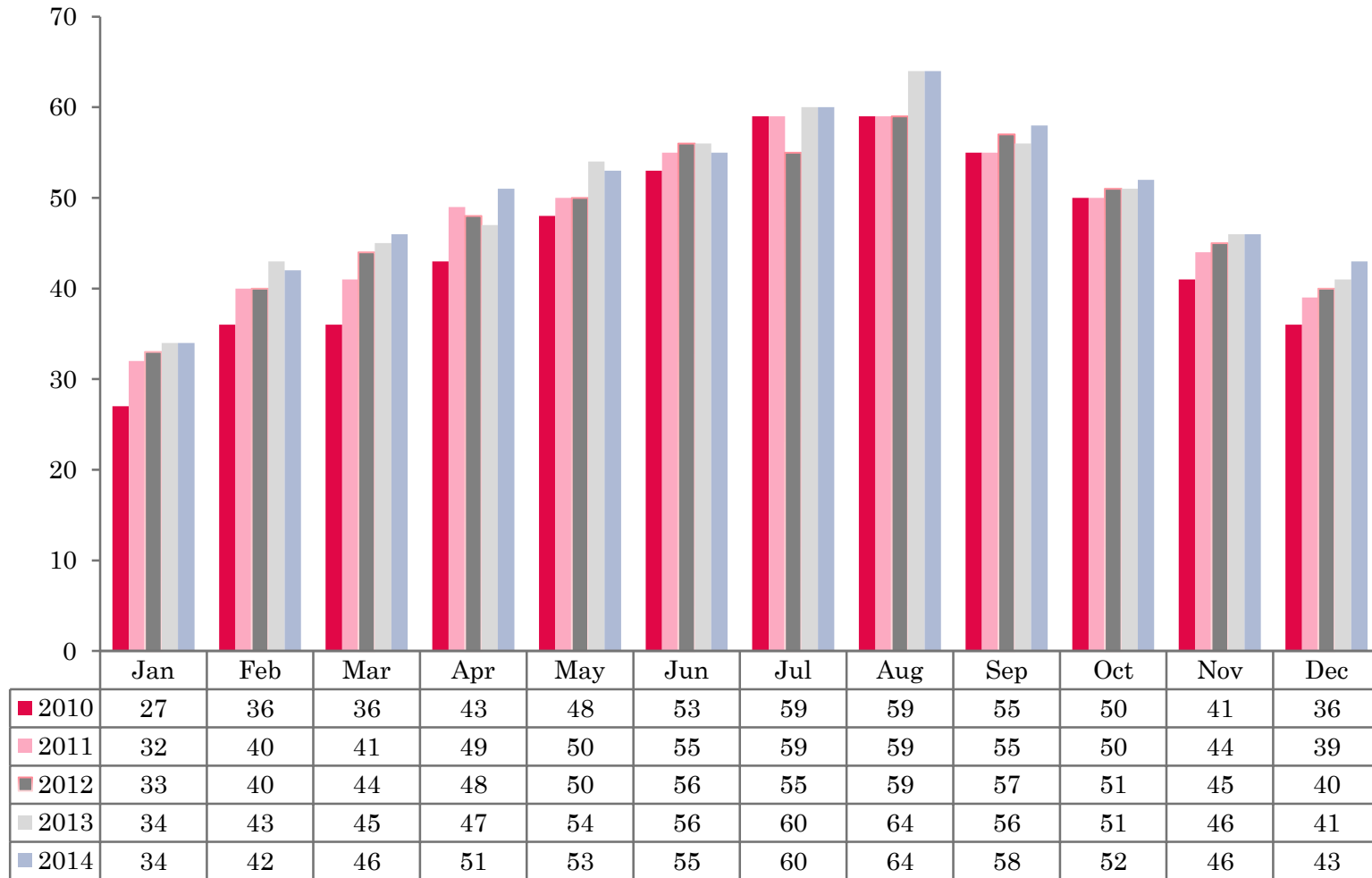
Serviced Accommodation Summary Report
December 2014

UK OCCUPANCY SURVEY

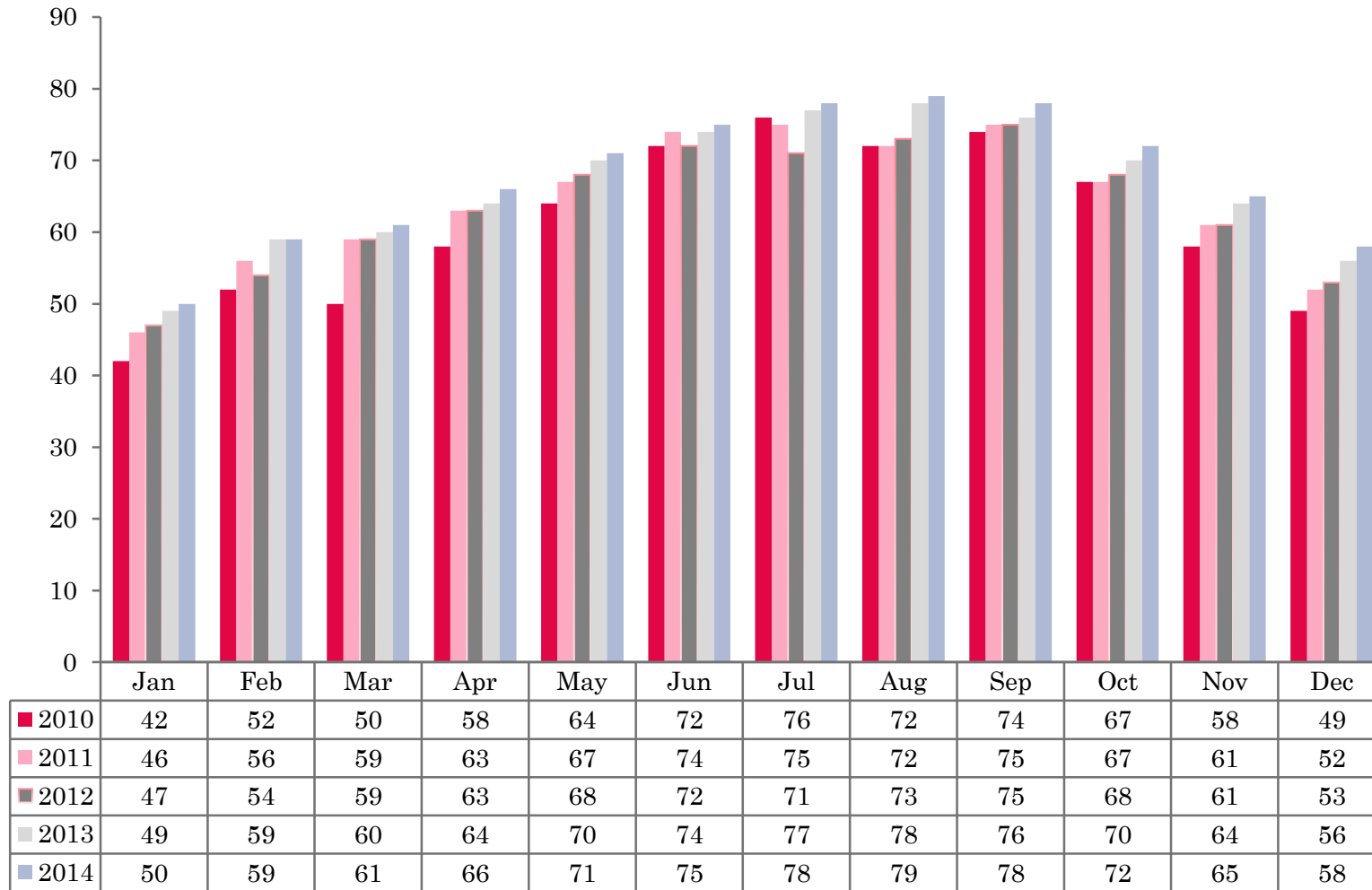
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2010 - 2014



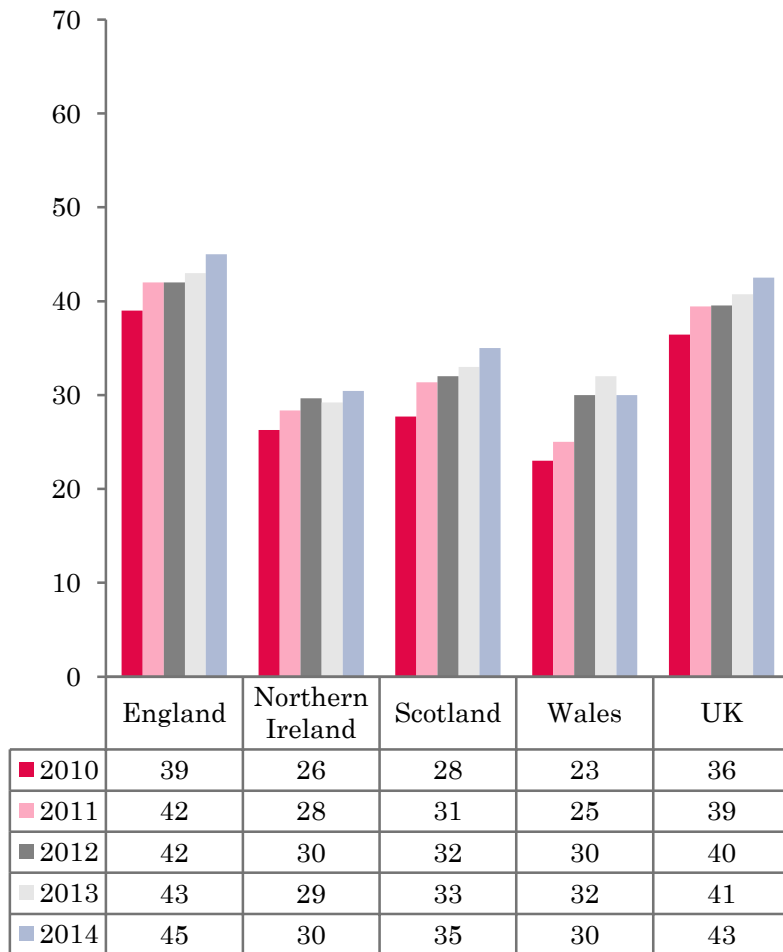
UK BEDROOM OCCUPANCY 2010 - 2014



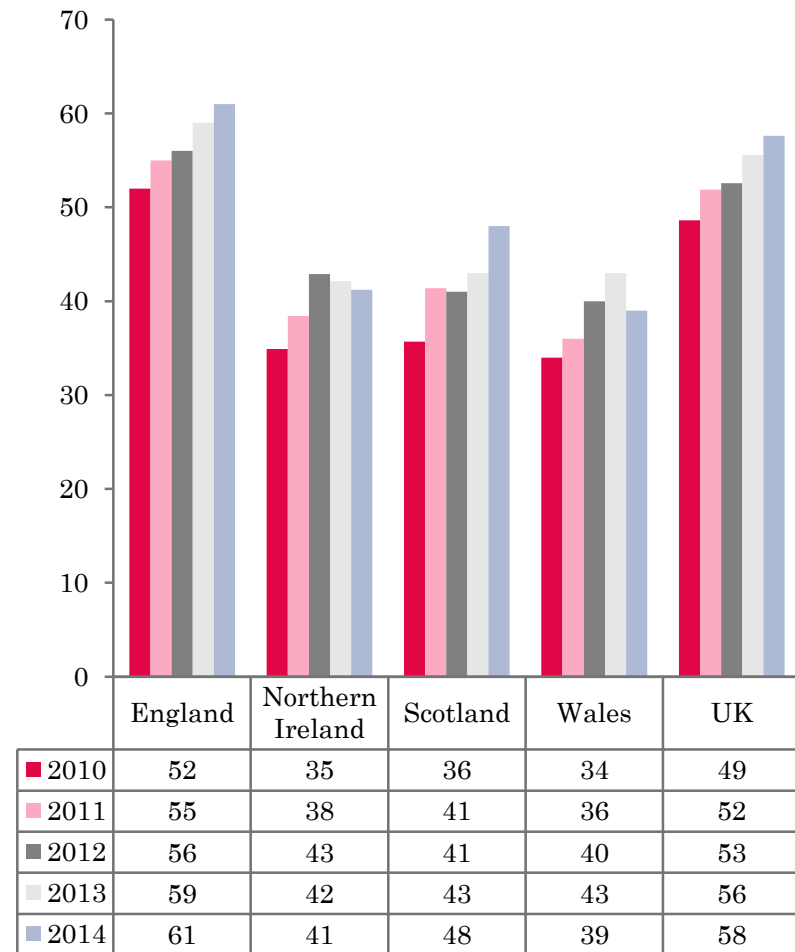
- ❖ 2,324 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (43%) and room occupancy (58%) had both increased by 2% when compared to December 2013.



NATIONAL BEDSPACE OCCUPANCY DECEMBER 2010-2014



NATIONAL ROOM OCCUPANCY DECEMBER 2010-2014



- In the UK during December 2014, both room and bedspace occupancy had increased by 2% when compared to the same period last year.
- England occupancy levels mirrored that of the UK, with both room and bedspace occupancy increasing by 2% on December 2013.
- Northern Ireland bedspace occupancy remained static (+1) when compared to the same month in 2013. Room occupancy also remained on a par (-1%) with December 2013.
- Wales witnessed a fall in both room and bedspace occupancy levels during December. Room occupancy was down by 4%, with bedspace occupancy levels falling by 2% when compared with the same period in 2013.
- Scotland had increased in both room and bed occupancy in December 2014. Bedspace occupancy had increased by 2%, with room occupancy increasing a healthy 5% on December 2014.
- Across the UK as a whole, bedspace occupancy by non-UK residents had fallen by 2% when compared with the previous year. Northern Ireland also witnessed a 2 percentage point drop in occupancy levels, with England occupancy mirroring UK levels (-2%) and Wales remaining flat during December. (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: December 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	42	43	45	56	59	61	1511	1905	1818
Northern Ireland	30	29	30	43	42	41	139	163	158
Scotland	32	33	35	41	43	48	287	268	250
Wales	30	32	30	40	43	39	108	106	98
UK	40	41	43	53	56	58	2045	2442	2324

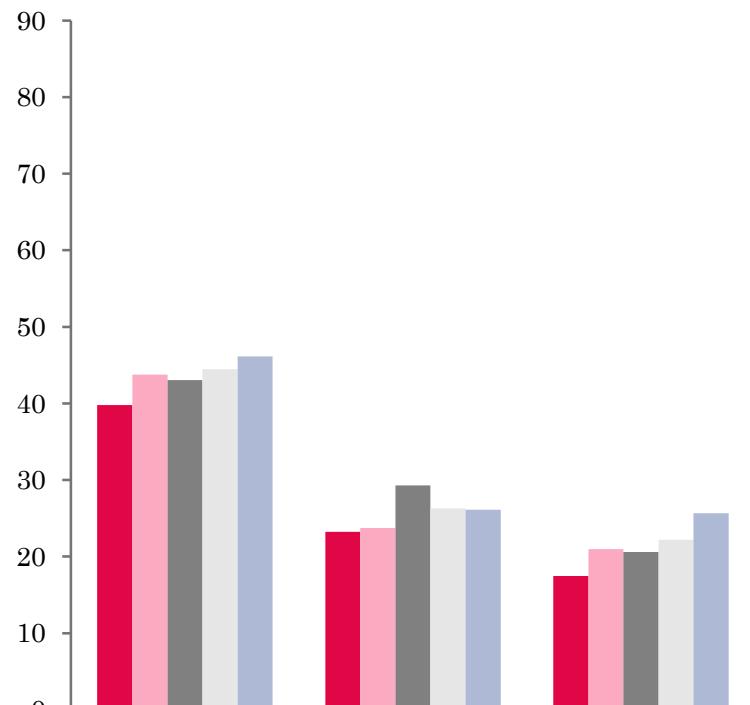
Table 2: UK/Non UK Occupancy Levels December 2012 – 2014 (see note 5a and 5b Slide 19)

	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	30	28	31	5	5	3	9	10	5	14	15	8	1511	1905	1818
Northern Ireland	19	15	18	11	14	12	27	48	35	36	49	41	139	163	158
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	287	268	250
Wales	25	30	29	1	2	1	**	**	**	4	6	4	108	106	98
UK	29	28	31	5	5	3	9	11	6	14	15	9	2045	2442	2324

** FIGURES NOT AVAILABLE

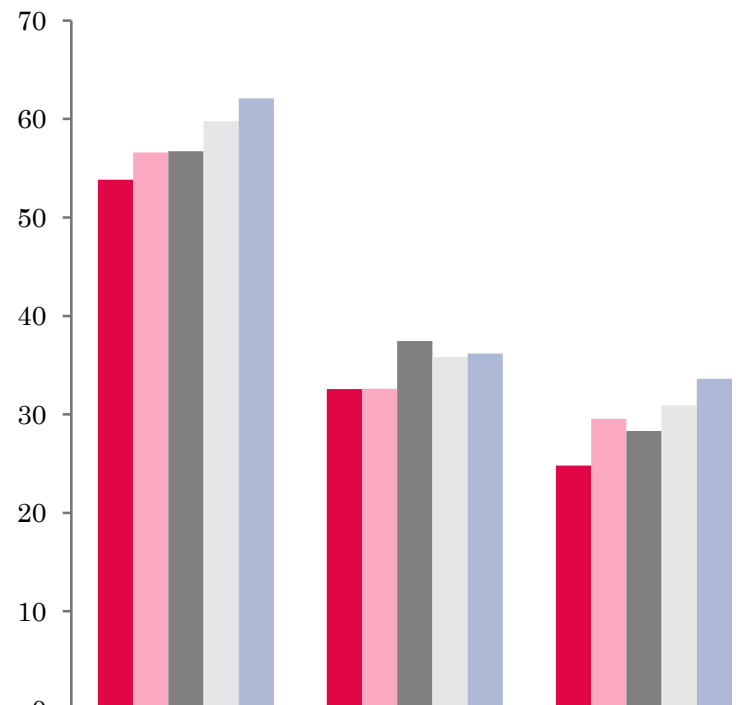


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2010-2014

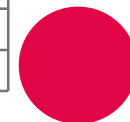


	Hotels	Guesthouses	B&Bs
2010	40	23	17
2011	44	24	21
2012	43	29	21
2013	44	26	22
2014	46	26	26

UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2010-2014



	Hotels	Guesthouses	B&Bs
2010	54	33	25
2011	57	33	30
2012	57	37	28
2013	60	36	31
2014	62	36	34



- Both Hotel and B&B's room and bed occupancy increased during December 2014. Both measures of occupancy increased by 2% in the Hotel sector. B&B's fared even better with bedspace occupancy up by 4% and room occupancy witnessing a 3% increase on 2013 data. (Table 3). Guesthouse occupancy levels remained flat when compared with the same period in 2013.
- Occupancy levels in all of the size bands had either increased or remained static in both measures of occupancy when compared to December 2013. The biggest movement in bedspace occupancy was in the 11-25 size banding where levels were up 3% on the same period last year. Room occupancy levels in the 1-3 banding had increased by 4%, the largest in room occupancy. Both the 26-50 and 51-100 size banding had remained flat compared to the same period the previous year.
- Seaside locations witnessed the biggest increase in bed occupancy, up by 7% during December 2014. Small town was up 2% in bedspace occupancy whilst both city/large town and countryside/village remained flat. Three out of the four locations increased by 2% in room occupancy during December, with just countryside/village locations remaining static.
- Only tariff band £20.00-£29.99 witnessed an increase in bedspace occupancy levels during December, up by 6% on 2013 data. All other tariff bands remained static in bedspace occupancy during this month. The £20.00-£29.99 tariff band witnessed the biggest increase in room occupancy, up by 5% on December 2013. With the exception of the £50.00-£59.99 tariff band which remained static, all other tariff bands had increased in room occupancy during December 2014.



Table 3: Occupancy Levels by Type of Establishment: December 2012 – 2014

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	45	46	48	59	62	65	986	1466	1440
Northern Ireland	34	35	37	49	50	49	52	72	75
Scotland	37	40	41	49	52	54	214	205	200
Wales	36	37	36	49	51	45	60	58	60
UK	43	44	46	57	60	62	1312	1801	1775
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	33	29	29	42	40	40	199	170	148
Northern Ireland	38	18	19	46	28	24	8	16	18
Scotland	17	16	16	22	19	23	34	29	20
Wales	10	16	13	15	21	19	22	21	17
UK	29	26	26	37	36	36	263	236	203
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	23	25	29	32	35	37	326	269	230
Northern Ireland	11	7	7	18	13	11	7	73	65
Scotland	14	11	16	17	15	26	39	34	30
Wales	10	16	9	13	19	12	26	27	21
UK	21	22	26	28	31	34	398	403	346



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: December 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	44	45	49	39	42	42	53	55	60	57	60	62
Northern Ireland	34	35	42	24	25	28	42	45	50	36	40	41
Scotland	35	36	39	29	31	34	40	42	47	42	44	49
Wales	32	32	34	26	31	26	39	43	40	40	42	37
UK	42	43	47	36	39	40	50	52	57	53	56	58



Table 5: Non-UK Percentages: December 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	8	10	4	9	11	6	17	15	6	17	16	9
Northern Ireland	25	32	31	28	38	35	35	40	38	39	43	42
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	4	5	3	3	6	4
UK	8	11	5	10	12	7	16	15	7	16	16	10

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Table 6: Occupancy Levels by Size: December 2012 - 2014

A: Percentage of Bedspace Occupancy												
	1 - 3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	19	19	21	146	24	25	26	214	32	35	38	96
Northern Ireland	5	6	8	5	24	11	9	24	20	18	22	31
Scotland	11	10	12	23	18	20	25	38	30	30	36	41
Wales	10	14	11	21	15	19	17	24	27	30	37	20
UK	17	17	19	195	23	24	25	300	31	34	37	188

Table6: Occupancy Levels by Size: December 2012 - 2014

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	41	44	44	55	47	45	45	30	47	48	51	1277
Northern Ireland	31	24	34	21	32	37	39	19	39	42	38	10
Scotland	33	34	34	53	43	47	43	41	46	48	49	54
Wales	42	33	37	19	35	37	45	10	42	****	35	4
UK	40	42	42	148	45	45	45	100	46	48	50	1345



Table 7: Occupancy Levels by Size: December 2012 – 2014

B:Percentage of Bedroom Occupancy												
	1 -3 Rooms				4 – 10 Rooms				11 – 25 Rooms			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	24	25	29	146	32	34	36	214	45	51	52	96
Northern Ireland	8	11	13	5	33	19	12	24	29	28	31	31
Scotland	14	14	22	23	24	24	32	38	38	37	43	41
Wales	13	17	14	21	19	24	22	24	37	40	46	20
UK	22	23	27	375	30	32	34	300	43	48	50	188

Table 7: Occupancy Levels by Size: December 2012 - 2014

B (cont): Percentage of Bedroom Occupancy												
	26 – 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	54	58	58	55	59	56	57	30	65	68	71	1277
Northern Ireland	43	39	43	21	45	50	50	19	57	58	53	10
Scotland	44	47	46	53	54	61	55	41	62	63	68	54
Wales	55	44	48	19	54	50	49	10	54	****	48	4
UK	52	55	55	148	58	56	56	100	64	67	69	1345



Table 8: Occupancy Levels by Location Types: December 2012 - 2014

A: Percentage Bedspace Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	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	33	31	39	156	50	52	53	1003	35	37	39	369	34	36	35	290
Northern Ireland	25	19	22	37	35	38	38	50	20	19	20	48	13	9	13	23
Scotland	27	24	29	24	42	46	47	119	21	20	21	49	22	22	27	58
Wales	34	33	34	28	42	44	45	9	25	24	30	12	18	24	24	49
UK	32	30	37	245	48	50	51	1181	32	34	36	478	31	33	33	420

Table 8: Occupancy Levels by Location Types: December 2012 - 2014

B:Percentage Bedroom Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	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	43	46	47	156	64	69	72	1003	51	54	56	369	45	48	46	290
Northern Ireland	34	25	29	37	52	53	51	50	27	27	26	48	20	16	20	23
Scotland	32	31	37	24	55	61	64	119	32	31	33	49	28	27	38	58
Wales	44	41	41	28	55	64	50	9	38	35	38	12	25	30	33	49
UK	41	43	45	245	62	67	69	1181	47	49	51	478	41	43	44	420

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 2012 – 2014
(see note 5a Slide 19)

A: Percentage of Bedspace Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	**	**	**	**	19	21	26	21	15	16	15	82
Northern Ireland	**	**	**	**	11	10	7	13	7	6	11	41
Scotland	**	**	**	**	13	12	30	7	17	12	11	28
Wales	**	**	**	**	14	4	3	4	13	18	16	18
UK	**	**	**	**	18	19	25	45	15	15	14	169

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 2012 – 2014 (see note 5a Slide 19)

B: Percentage of Bedspace Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	26	26	27	119	30	36	35	74	45	46	47	1522
Northern Ireland	20	19	27	30	21	40	38	20	35	32	35	54
Scotland	17	21	24	28	30	36	37	30	43	41	44	157
Wales	15	22	20	19	30	24	38	16	37	40	36	41
UK	24	25	26	196	30	35	35	140	44	45	46	1774

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 2012 – 2014 (see note 5a Slide 19)

A: Percentage of Bedroom Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	**	**	**	**	32	37	39	21	22	25	28	82
Northern Ireland	**	**	**	**	23	14	7	13	11	9	16	41
Scotland	**	**	**	**	16	15	45	7	25	19	18	28
Wales	**	**	**	**	17	7	6	4	19	24	23	18
UK	**	**	**	**	29	32	37	45	22	24	26	169

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 2012 – 2014 (see note 5a Slide 19)

B: Percentage of Bedroom Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	35	33	36	119	38	46	44	74	60	62	65	1522
Northern Ireland	27	27	37	30	30	54	54	20	51	48	46	54
Scotland	26	32	36	28	41	49	54	30	54	53	57	157
Wales	22	31	34	19	39	30	47	16	50	54	46	41
UK	33	33	36	196	38	46	46	140	58	60	62	1774

** 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)

