



UNITED KINGDOM OCCUPANCY SURVEY

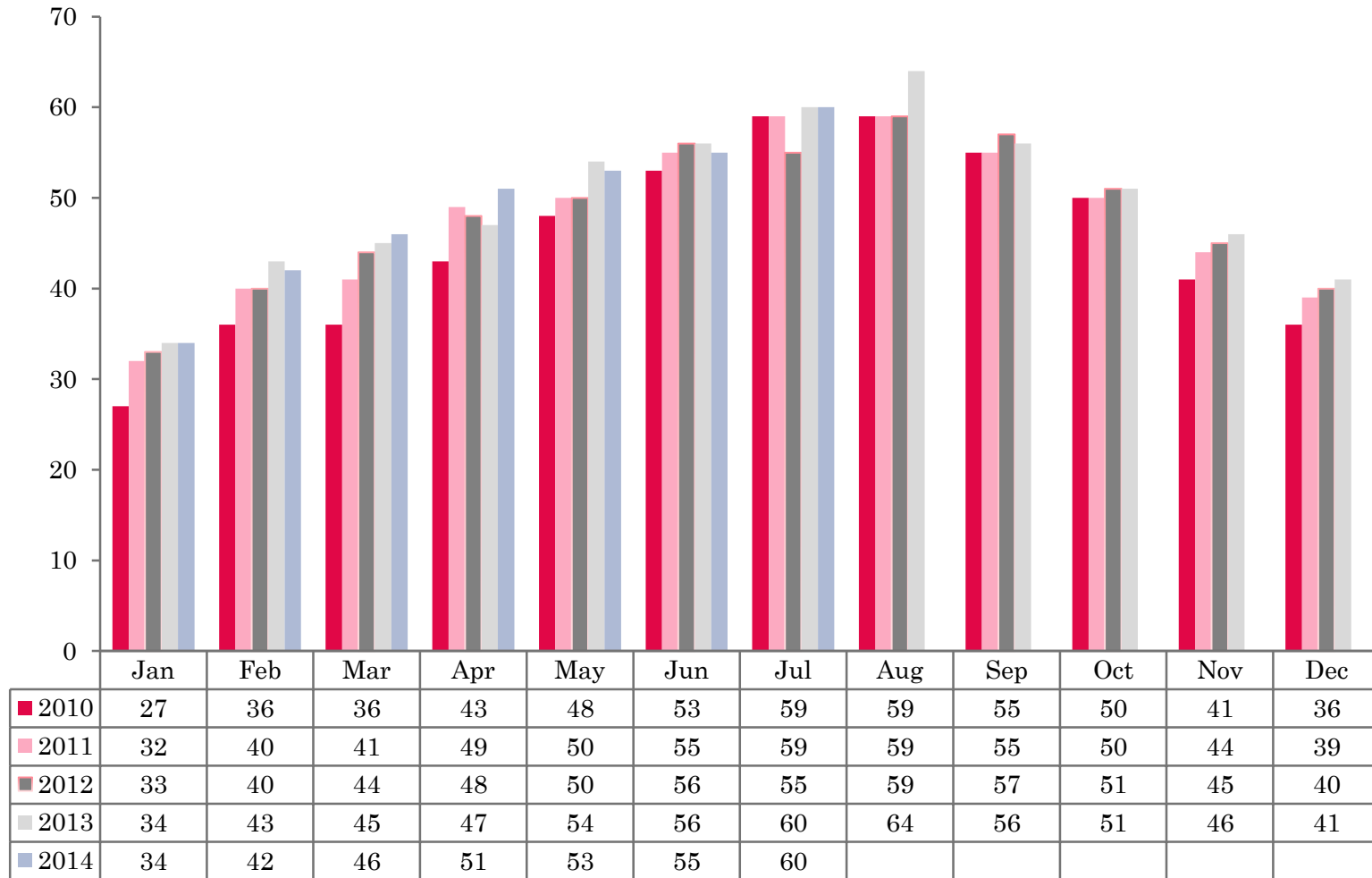
Serviced Accommodation Summary Report
July 2014

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



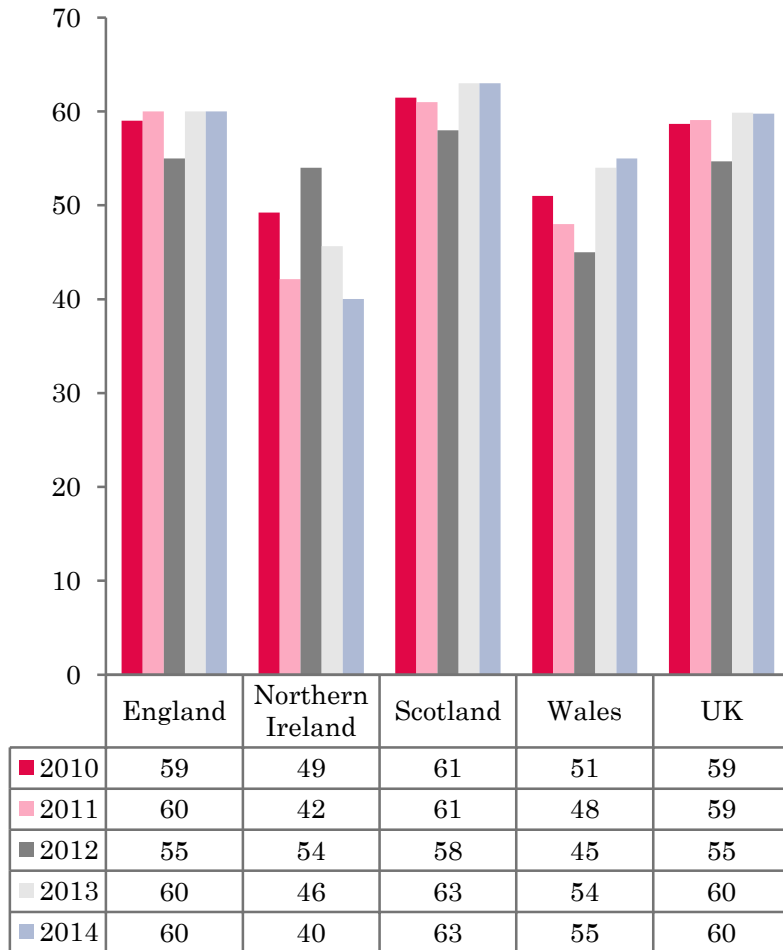
UK BEDROOM OCCUPANCY 2010 - 2014



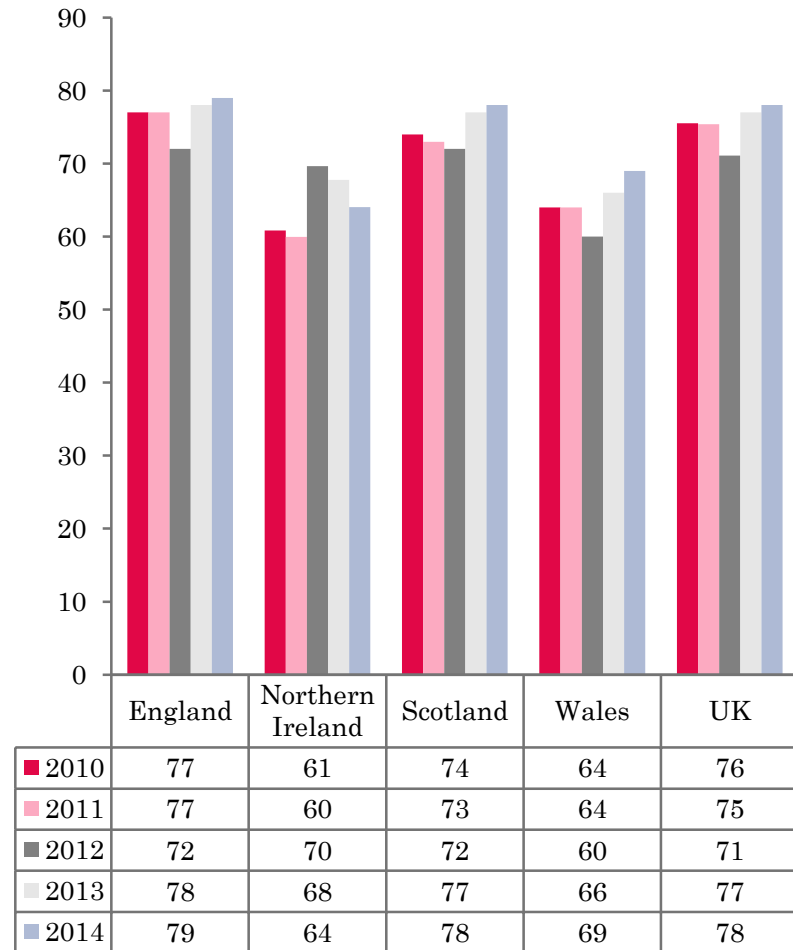
- ❖ 2,502 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (60%) and room occupancy (78%) had remained flat when compared to July 2014.



NATIONAL BEDSPACE OCCUPANCY JULY 2010-2014



NATIONAL ROOM OCCUPANCY JULY 2010-2014



- There was no movement in bedspace occupancy in England during July, remaining flat at 60%. Room occupancy was up slightly by 1% when compared with July 2013 (79%).
- In the UK during July 2014, room occupancy mirrored that of England (+1%), with bedspace occupancy remaining static.
- Northern Ireland saw a drop in room occupancy of 4% during July 2014, falling to 64%. Bed occupancy fell to 40% from 46% in 2013.
- Wales witnessed a rise in both room and bedspace occupancy levels during July. Room occupancy went up by 3 percentage points with bedspace occupancy up marginally by 1%.
- Occupancy levels in Scotland for both room and bedspace had remained static during July 2014 when compared to the previous year.
- Across the UK as a whole, bedspace occupancy by non-UK residents had decreased marginally (-1%) when compared with July 2013. England mirrored the UK, whilst Northern Ireland levels fell by 2% when compared to 2013 data. Wales saw a marginal increase during July 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: July 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	55	60	60	72	78	79	1613	2080	1920
Northern Ireland	54	46	40	70	68	64	160	173	180
Scotland	58	63	63	72	0	78	326	328	283
Wales	45	54	55	60	66	69	149	136	119
UK	55	60	60	71	77	78	2248	2717	2502

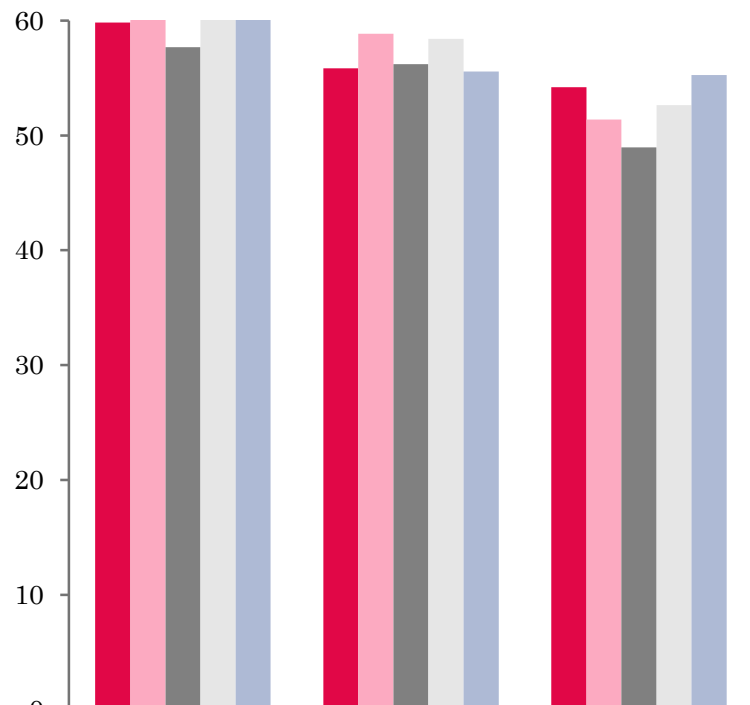
Table 2: UK/Non UK Occupancy Levels July 2012 – 2014 (see note 5a and 5b Slide 19)

	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	45	50	49	8	9	8	14	15	12	16	15	13	1613	2080	1920
Northern Ireland	36	25	21	18	21	19	34	38	42	34	46	47	160	173	180
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	326	328	283
Wales	40	49	49	4	5	6	**	**	**	10	10	11	149	136	119
UK	44	49	48	8	9	8	15	16	13	16	15	14	2248	2717	2502

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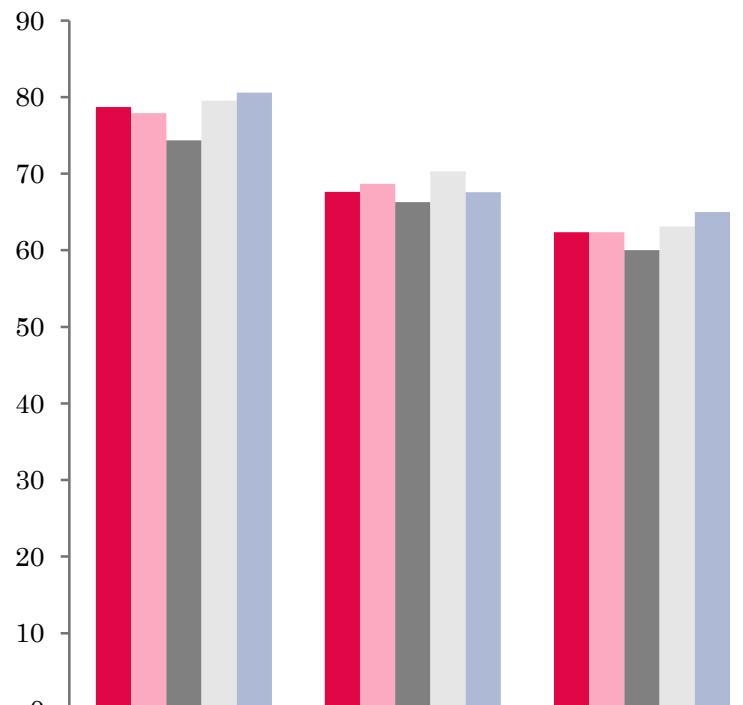


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JULY 2010-2014



	Hotels	Guesthouses	B&Bs
2010	60	56	54
2011	60	59	51
2012	58	56	49
2013	61	58	53
2014	61	56	55

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



	Hotels	Guesthouses	B&Bs
2010	79	68	62
2011	78	69	62
2012	74	66	60
2013	80	70	63
2014	81	68	65



- Both room and bedspace occupancy in B&B establishments had increased by 2%, with guesthouse occupancy witnessing a slight decrease in both measures of occupancy (-2%). Hotel accommodation saw bedspace occupancy remain static at 61%, with room occupancy remaining flat (+1%). (Table 3).
- Across all size bandings, only the 1-3 size band had increased in both measures of occupancy, up 3% in bedspace and 2% in room occupancy. The largest increase in bedspace occupancy was in the 51-100 size banding up 8% on the same period last year. Nearly all other size bandings had either fallen slightly or remained static when compared with the previous year's results, except bedspace occupancy in the 4-10 size banding which was up 1% and room occupancy in the >100 banding, again up 1%.
- Both Small town and Countryside/Village locations saw an improvement in bedspace occupancy levels this month, up 2% and 1% respectively. Countryside location witnessed the only increase in room occupancy, up a marginal 1% on 2013. All other locations were either down slightly or remained on par with July 2013. (Table 8).
- Both the £20.00-£29.99 and £40.00-£49.99 tariff bands increased in both measures of occupancy compared to July 2013. The £20.00-£29.99 tariff band increased 3% in bedspace and 2% in room occupancy, the £40.00-£49.99 tariff band increased by 2% in both room and bedspace occupancy. All other size bandings witnessed a slight downturn in occupancy levels or had remained static when compared to July 2013



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	58	61	61	75	80	81	994	1534	1467
Northern Ireland	60	49	42	77	75	72	52	69	82
Scotland	60	64	65	75	80	82	219	223	199
Wales	49	57	60	65	73	74	73	66	68
UK	58	61	61	74	80	81	1338	1892	1816
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	58	58	56	68	71	69	239	212	174
Northern Ireland	45	51	43	60	67	51	18	19	21
Scotland	56	66	60	65	74	68	49	44	38
Wales	40	45	41	52	50	52	28	27	19
UK	56	58	56	66	70	68	334	302	252
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	50	52	56	62	63	66	380	334	279
Northern Ireland	30	29	29	41	38	36	90	85	77
Scotland	54	59	59	63	68	69	58	61	46
Wales	33	53	44	38	60	50	48	43	32
UK	49	53	55	60	63	65	576	523	434



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: July 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	57	63	62	52	56	57	68	75	75	74	79	80
Northern Ireland	53	45	47	49	45	42	71	68	68	67	67	66
Scotland	61	66	65	57	62	62	70	76	76	73	79	80
Wales	48	58	60	43	51	52	58	68	69	62	66	66
UK	57	63	62	52	56	57	68	75	75	73	78	79



Table 5: Non-UK Percentages: July 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	12	13	11	15	18	14	15	15	13	17	17	14
Northern Ireland	37	30	40	39	36	45	53	42	43	36	46	48
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	10	9	10	10	11	11
UK	13	13	12	16	18	15	16	15	14	17	17	15

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Table 6: Occupancy Levels by Size: July 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	47	47	52	189	52	55	56	248	53	59	57	104
Northern Ireland	23	22	22	60	43	52	40	29	40	48	37	35
Scotland	52	56	53	39	55	64	63	53	59	66	65	42
Wales	31	43	42	32	43	53	53	31	45	52	54	23
UK	46	48	51	320	52	56	57	361	53	59	58	204

Table6: Occupancy Levels by Size: July 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	59	65	65	59	55	66	75	34	55	58	59	1286
Northern Ireland	48	35	50	22	58	45	47	23	69	58	38	11
Scotland	60	64	66	51	63	65	65	43	61	64	64	55
Wales	49	56	57	20	51	63	70	9	47	55	58	2
UK	58	64	64	152	56	65	73	109	56	59	59	1352



Table 7: Occupancy Levels by Size: July 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	55	56	60	189	63	66	67	248	64	73	73	104
Northern Ireland	34	31	31	60	52	57	46	29	58	63	49	35
Scotland	60	66	64	39	64	73	72	53	69	78	79	42
Wales	37	51	50	32	53	61	63	31	58	60	64	23
UK	54	57	59	375	62	67	67	361	64	73	73	204

Table 7: Occupancy Levels by Size: June 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	73	80	79	59	71	80	78	34	78	83	84	1286
Northern Ireland	71	66	74	22	74	76	69	23	85	81	77	11
Scotland	73	78	81	51	79	83	83	43	81	85	88	55
Wales	64	73	72	20	73	79	81	9	66	84	88	2
UK	72	79	79	152	72	80	79	109	78	83	84	1352



Table 8: Occupancy Levels by Location Types: July 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	57	70	64	195	58	61	61	1008	52	54	55	374	50	58	59	343
Northern Ireland	47	50	51	41	63	52	39	55	39	30	36	57	26	26	33	27
Scotland	59	69	67	33	60	64	63	120	52	53	57	57	59	66	65	73
Wales	52	63	64	33	42	57	55	8	46	50	58	16	41	47	46	62
UK	57	69	64	302	57	61	61	1191	51	53	55	504	50	58	59	505

Table 8: Occupancy Levels by Location Types: July 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	69	77	74	195	76	83	84	1008	73	76	76	374	60	72	73	343
Northern Ireland	65	72	70	41	79	74	71	55	49	50	45	57	40	42	42	27
Scotland	72	80	78	33	78	83	84	120	65	67	71	57	67	75	75	73
Wales	64	74	76	33	62	77	76	8	67	65	73	16	51	59	58	62
UK	69	77	75	302	75	83	83	1191	71	74	74	504	60	71	72	505

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	**	**	**	**	37	37	41	29	44	48	44	107
Northern Ireland	**	**	**	**	27	11	17	14	34	38	29	49
Scotland	**	**	**	**	38	47	46	7	51	55	55	43
Wales	**	**	**	**	31	40	43	5	40	49	44	30
UK	**	**	**	**	37	38	41	55	44	49	45	229

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	55	58	62	125	57	59	56	86	55	60	60	1541
Northern Ireland	49	47	40	32	63	44	52	23	59	48	41	62
Scotland	61	63	60	36	58	70	70	30	62	66	66	167
Wales	43	43	38	20	49	54	60	16	48	60	63	48
UK	55	58	60	213	57	60	58	155	56	61	61	1818

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) July 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	**	**	**	**	49	50	54	29	55	58	56	107
Northern Ireland	**	**	**	**	40	25	23	14	44	42	35	49
Scotland	**	**	**	**	51	60	51	7	65	66	66	43
Wales	**	**	**	**	48	46	61	5	50	57	55	30
UK	**	**	**	**	49	51	53	55	56	59	57	229

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) July 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	66	71	74	125	67	69	69	86	74	80	81	1541
Northern Ireland	62	60	54	32	77	69	68	23	77	75	72	62
Scotland	71	74	74	36	69	82	80	30	76	82	83	167
Wales	55	64	62	20	60	68	72	16	66	74	76	48
UK	66	71	73	213	67	71	71	155	74	80	81	1818

** 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)

