



UNITED KINGDOM OCCUPANCY SURVEY

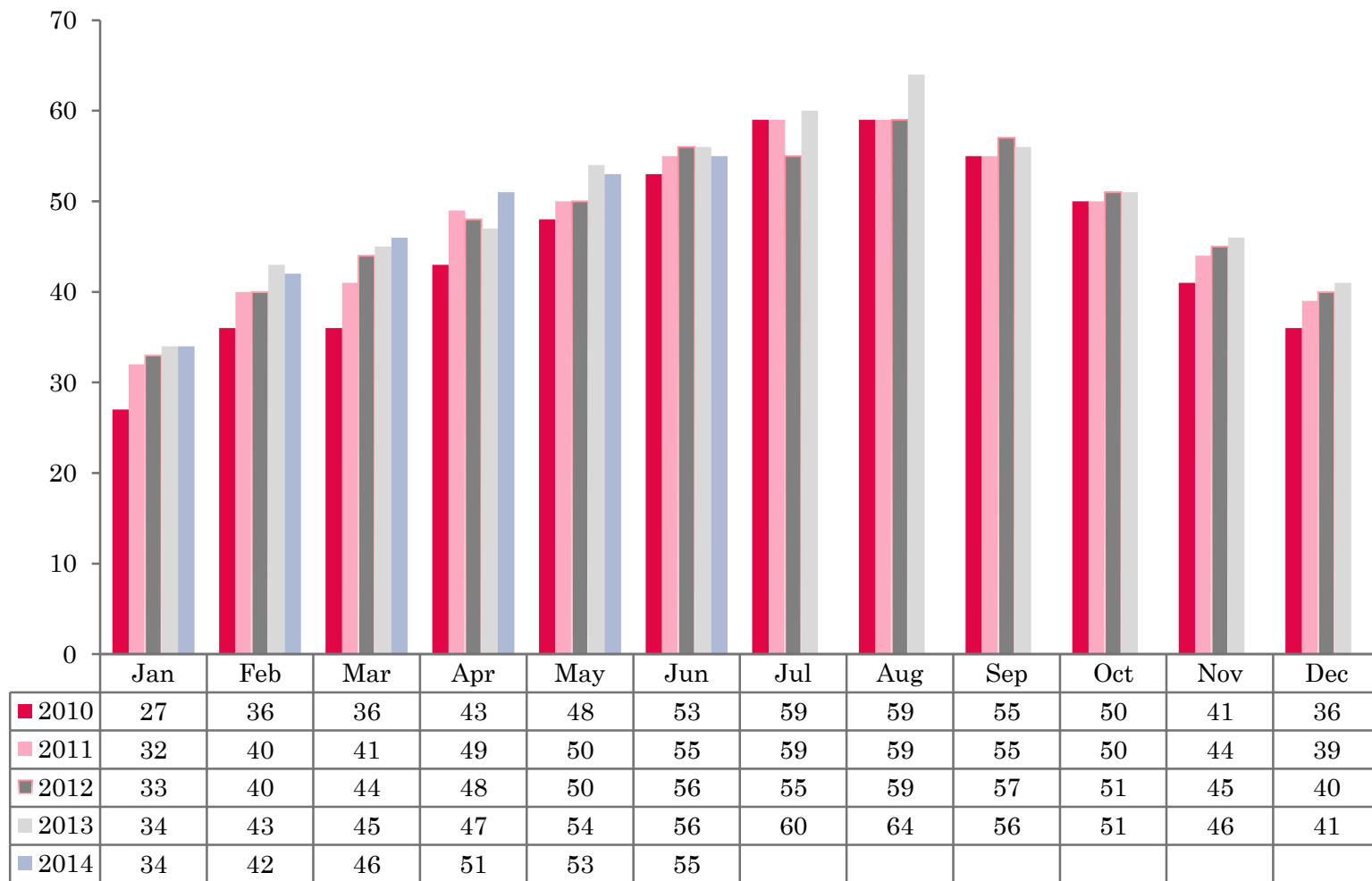
Serviced Accommodation Summary Report
June 2014

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



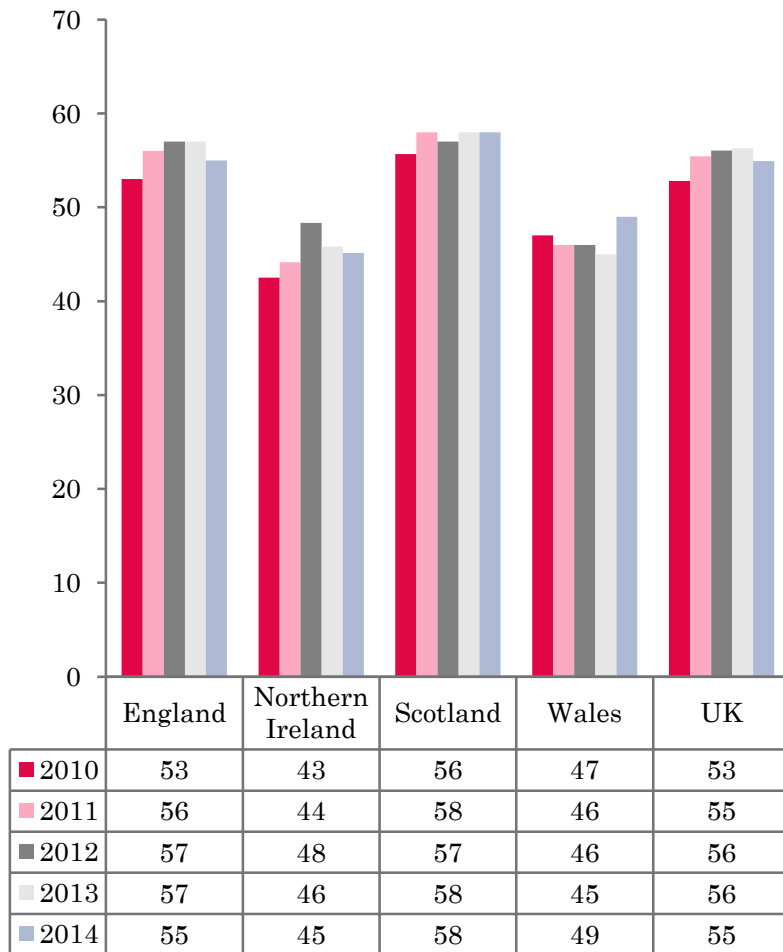
UK BEDROOM OCCUPANCY 2010 - 2014



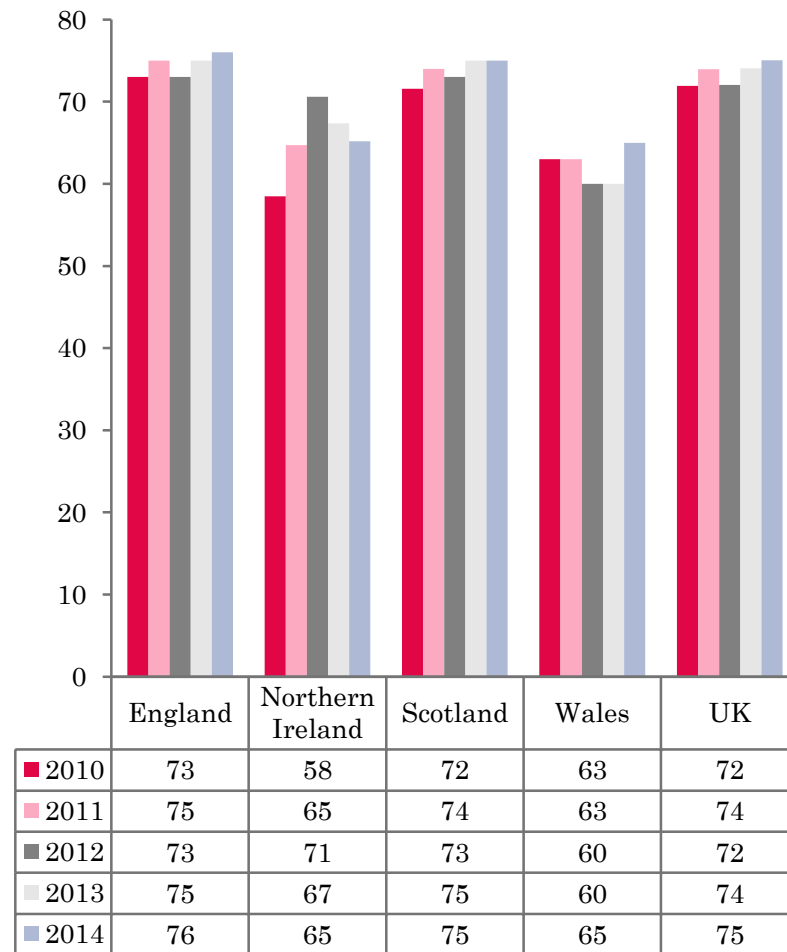
- ❖ 2,531 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (55%) and room occupancy (75%) had remained flat when compared to June 2013.



NATIONAL BEDSPACE OCCUPANCY JUNE 2010-2014



NATIONAL ROOM OCCUPANCY JUNE 2010-2014



- There was some movement in both bedspace and room occupancy in England, bedspace down 2 percentage points (55%) and room occupancy up slightly by 1% when compared with June 2013 (76%). Bedspace occupancy in Northern Ireland was lowest at 45%.
- In the UK during June 2014, room occupancy mirrored that of England (+1%), with bedspace occupancy witnessing a slight decrease (-1%).
- Northern Ireland saw a drop in room occupancy of 2% during June 2014. Bed occupancy also fell slightly to 45% from 46% in 2013.
- Wales witnessed a rise in both room and bedspace occupancy levels during June. Room occupancy went up by 5 percentage points with bedspace occupancy also fairing a lot better than the same period in 2013, up by 4%.
- Occupancy levels in Scotland for both room and bedspace had remained static during June 2014 when compared to the previous year, but continued to show positive occupancy levels when compared to the rest of the UK.
- Across the UK as a whole, bedspace occupancy by non-UK residents had increased marginally (+1%) when compared with June 2013. England mirrored the UK, whilst Northern Ireland remained the same as 2013 data. Wales saw a marginal increase during June 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: June 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	57	57	55	73	75	76	1610	2051	1944
Northern Ireland	48	46	45	71	67	65	173	169	166
Scotland	57	58	58	73	75	75	339	313	304
Wales	46	45	49	60	60	65	143	138	117
UK	56	56	55	72	74	75	2265	2671	2531

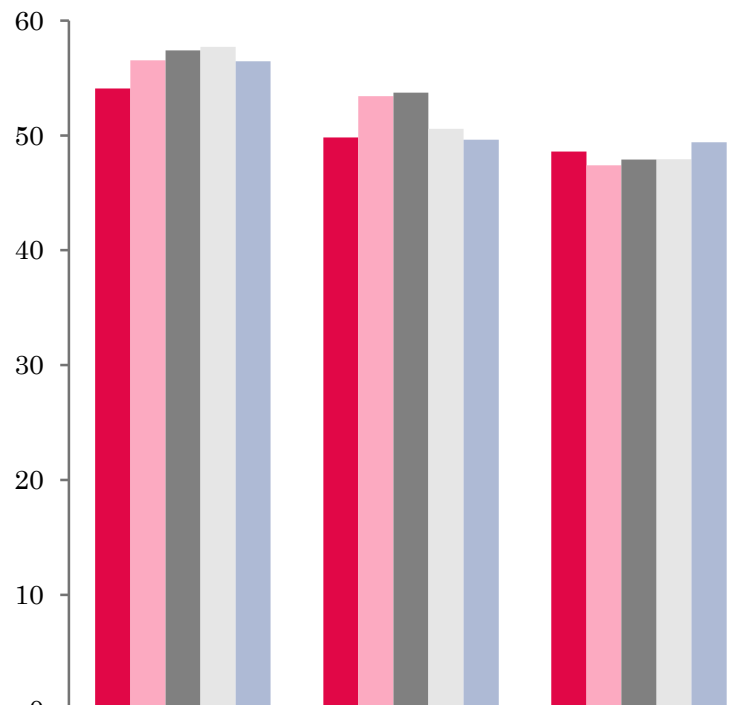
Table 2: UK/Non UK Occupancy Levels June 2012 – 2014 (see note 5a and 5b Slide 19)

	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	46	43	43	8	8	9	12	13	14	15	16	17	1610	2051	1944
Northern Ireland	25	22	21	24	24	24	36	43	46	49	52	53	173	169	166
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	339	313	304
Wales	41	40	43	2	4	5	**	**	**	6	9	10	143	138	117
UK	45	42	42	8	8	9	13	14	15	15	16	17	2265	2671	1531

** FIGURES NOT AVAILABLE

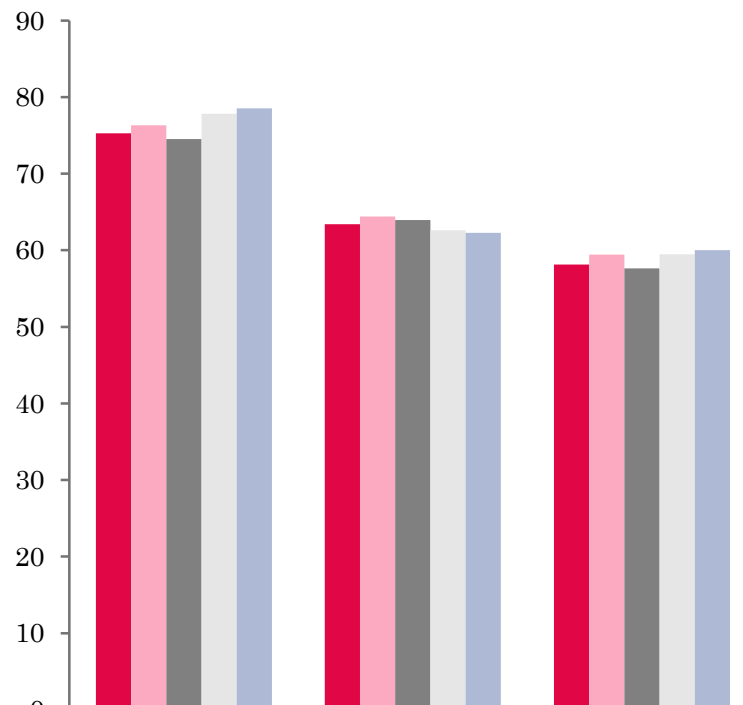


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JUNE 2010-2014



	Hotels	Guesthouses	B&Bs
2010	54	50	49
2011	57	53	47
2012	57	54	48
2013	58	51	48
2014	56	50	49

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



	Hotels	Guesthouses	B&Bs
2010	75	63	58
2011	76	64	59
2012	75	64	58
2013	78	63	59
2014	79	62	60



- Both room and bedspace occupancy in B&B establishments had increased by a marginal 1%, with guesthouse occupancy witnessing a slight decrease in both measures of occupancy (-1%). Hotel accommodation saw bedspace occupancy fall by 2%, down from 58% in June 2013 to 56% in June this year, with room occupancy increasing by 1%. (Table 3).
- Across all size bandings, only the 11-25 size band had increased in both measures of occupancy, up 2% in both bedspace and room occupancy. Nearly all other size bandings had fallen or remained static when compared with the previous year's results, except bedspace occupancy in the 26-50 size banding which was up 2% and room occupancy in the 51-100 banding, up 1%.
- Only City/Large town locations saw any kind of improvement in occupancy levels this month, with room occupancy up 1% on June 2013. All other locations were either down slightly or remained on par with June 2013. Seaside locations saw the most notable decrease in bedspace occupancy, down 6 percentage points on June 2013. (Table 8).
- The £50.00-£59.99 was the only tariff band who witnessed an increase in both bedspace and room occupancy, up by 4pp in bedspace occupancy and a healthy 6% in room occupancy. The >£60.00 tariff band was the only other banding to witness an increase in bedspace occupancy (+1%), with the £20.00-£29.99 the only other tariff band to see a rise in room occupancy (+4%). The remaining tariff bands had either remained flat or fallen slightly when compared to the previous year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	58	58	56	75	78	79	994	1496	1477
Northern Ireland	52	52	54	78	78	74	59	63	70
Scotland	59	60	60	76	80	79	225	214	210
Wales	49	49	54	65	69	72	70	68	60
UK	57	58	56	75	78	79	1348	1841	1817
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	55	51	50	65	64	63	239	214	183
Northern Ireland	43	38	29	53	49	59	23	18	18
Scotland	57	55	55	69	64	65	49	44	40
Wales	36	36	37	45	43	45	30	28	20
UK	54	51	50	64	63	62	341	304	261
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	49	48	50	59	60	61	377	341	284
Northern Ireland	29	25	22	41	36	30	91	88	78
Scotland	48	53	55	59	64	66	65	55	54
Wales	41	41	35	45	48	40	43	42	37
UK	48	48	49	58	59	60	576	526	453



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: June 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	59	57	57	53	53	54	70	71	70	74	79	79
Northern Ireland	53	50	53	42	42	41	71	68	66	69	68	62
Scotland	60	60	61	55	58	57	71	71	72	74	79	77
Wales	49	49	52	42	41	45	60	61	64	60	60	66
UK	58	57	57	52	53	54	70	70	70	73	78	78



Table 5: Non-UK Percentages: June 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	11	13	15	16	17	14	15	16	16	17	19
Northern Ireland	37	43	36	43	51	43	53	53	45	58	57	48
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	8	9	6	11	12
UK	12	12	14	16	17	18	14	15	16	16	18	19

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: June 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	45	45	45	190	49	49	48	257	52	51	53	111
Northern Ireland	21	21	17	64	42	38	25	22	45	35	38	34
Scotland	46	52	50	43	56	53	59	63	59	61	59	48
Wales	26	37	36	34	45	41	42	34	46	42	52	21
UK	43	45	45	331	50	49	49	376	52	52	54	214

Table6: Occupancy Levels by Size: June 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	60	59	61	62	62	59	56	37	57	57	56	1287
Northern Ireland	40	39	46	19	46	49	54	18	61	61	62	9
Scotland	59	60	60	53	64	63	62	41	59	62	59	56
Wales	55	51	51	15	52	53	62	10	44	55	55	3
UK	59	58	60	149	61	59	57	106	56	58	57	1355



Table 7: Occupancy Levels by Size: June 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	52	54	54	190	60	61	60	257	64	67	69	111
Northern Ireland	32	29	24	64	46	48	48	22	62	48	53	34
Scotland	57	64	62	43	68	63	67	63	70	74	74	48
Wales	32	46	43	34	55	50	52	34	59	54	60	21
UK	51	55	54	375	61	60	60	376	64	67	69	214

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	74	76	75	62	77	75	76	37	78	82	82	1287
Northern Ireland	66	67	66	19	76	74	75	18	86	88	80	9
Scotland	75	79	78	53	81	84	82	41	81	86	86	56
Wales	70	69	66	15	69	77	75	10	65	85	86	3
UK	74	76	75	149	77	76	77	106	78	83	83	1355



Table 8: Occupancy Levels by Location Types: June 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	56	59	51	199	59	60	59	1012	51	51	50	389	55	54	53	344
Northern Ireland	46	44	46	40	54	53	54	47	35	35	32	53	29	25	22	26
Scotland	58	65	62	39	60	61	60	122	50	50	49	60	56	58	60	83
Wales	55	55	58	34	38	52	43	6	46	40	58	15	44	39	39	62
UK	56	59	53	312	58	60	58	1187	50	50	50	517	54	53	53	515

Table 8: Occupancy Levels by Location Types: June 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	68	69	68	199	77	83	83	1012	70	72	72	389	67	69	67	344
Northern Ireland	64	61	62	40	81	80	75	47	49	47	49	53	39	43	32	26
Scotland	73	78	74	39	80	81	83	122	64	67	64	60	68	71	72	83
Wales	68	67	69	34	56	74	79	6	67	67	69	15	53	49	49	62
UK	69	70	69	312	76	82	83	1187	68	70	70	517	66	68	66	515

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	**	**	**	**	31	33	32	32	42	39	38	114
Northern Ireland	**	**	**	**	29	15	12	17	32	25	25	48
Scotland	**	**	**	**	38	44	49	11	49	49	49	45
Wales	**	**	**	**	13	27	26	6	42	38	38	32
UK	**	**	**	**	31	34	34	66	43	40	39	239

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	56	53	53	131	55	53	58	86	58	57	57	1551
Northern Ireland	39	34	34	28	36	43	51	21	54	54	53	52
Scotland	63	56	57	41	58	68	65	35	61	62	61	172
Wales	46	36	39	19	56	50	66	15	48	52	57	45
UK	56	52	52	219	55	55	59	157	58	57	58	1820

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	**	**	**	**	43	42	47	32	52	51	50	114
Northern Ireland	**	**	**	**	40	24	19	17	40	34	31	48
Scotland	**	**	**	**	52	56	58	11	63	63	60	45
Wales	**	**	**	**	17	35	35	6	54	47	48	32
UK	**	**	**	**	42	43	47	66	54	52	51	239

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	66	66	131	66	63	71	86	75	78	78	1551
Northern Ireland	56	49	50	28	58	62	77	21	80	80	74	52
Scotland	75	70	71	41	72	82	76	35	78	81	81	172
Wales	60	54	56	19	66	61	68	15	65	71	74	45
UK	67	66	66	219	67	66	72	157	75	78	78	1820

** 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)

