



UNITED KINGDOM OCCUPANCY SURVEY

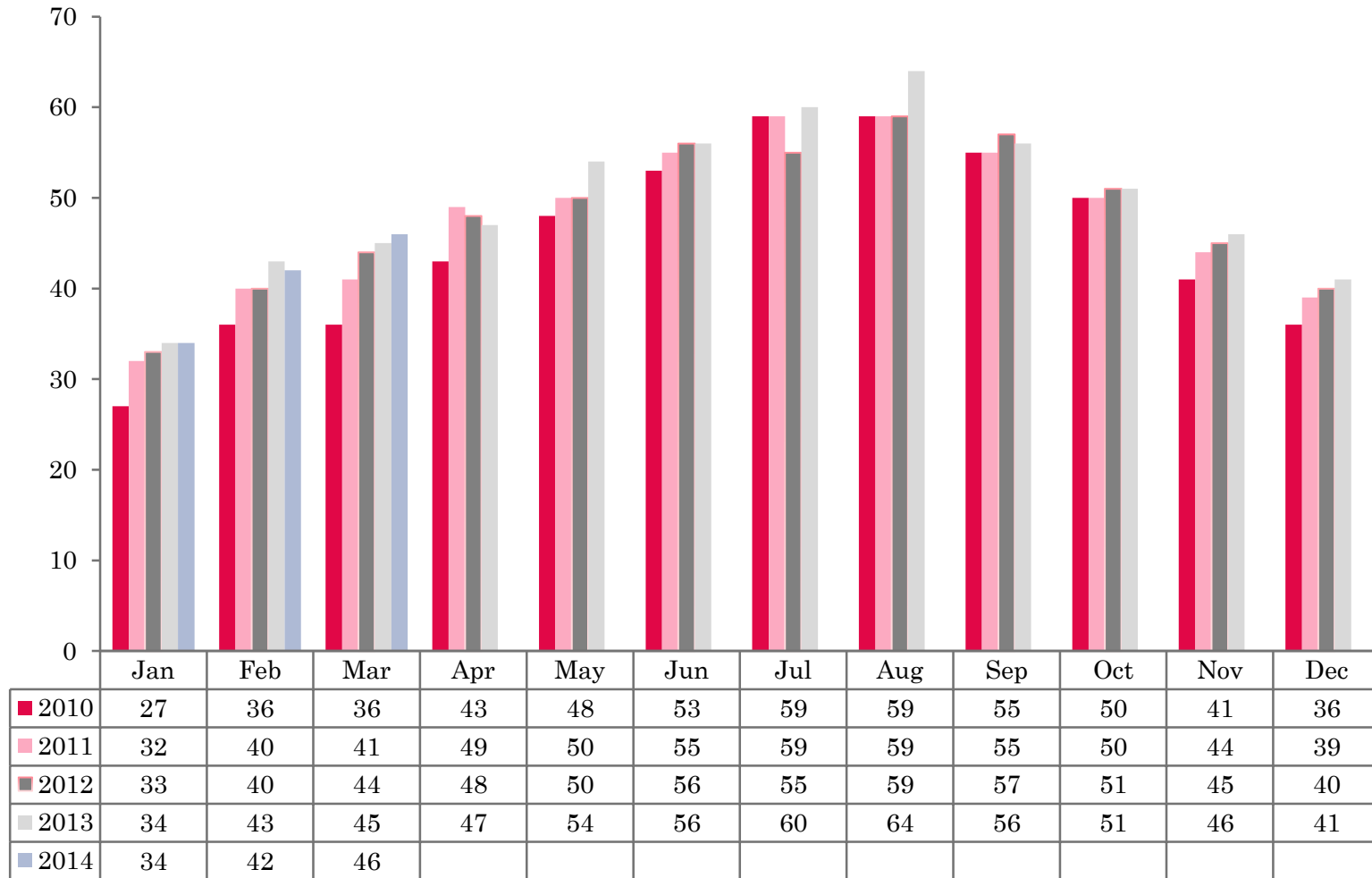
Serviced Accommodation Summary Report
March 2014

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



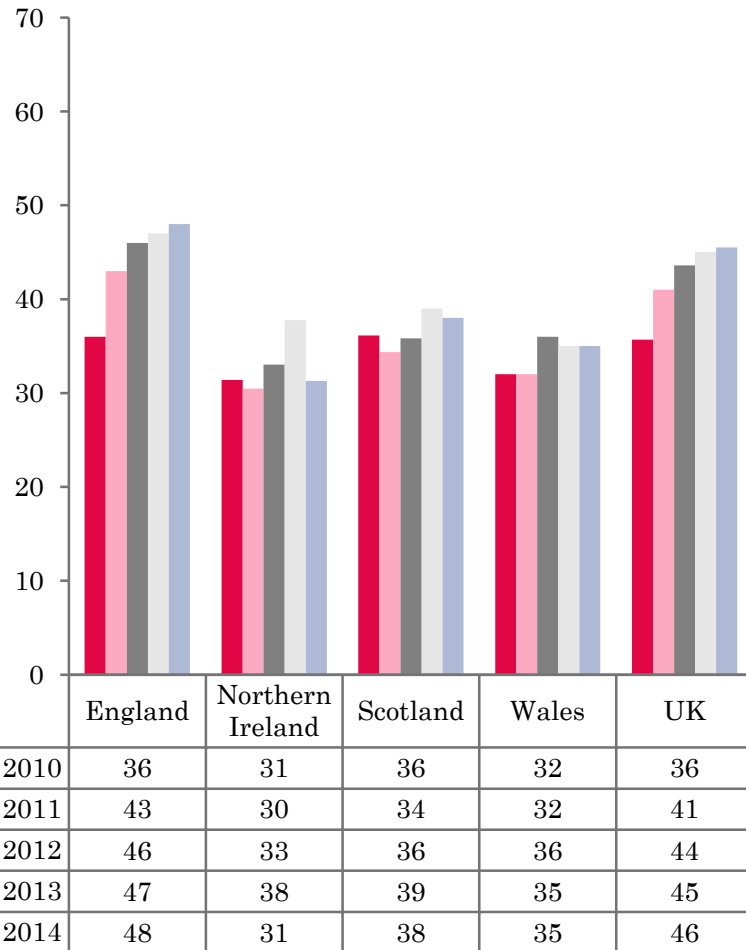
UK BEDROOM OCCUPANCY 2010 - 2014



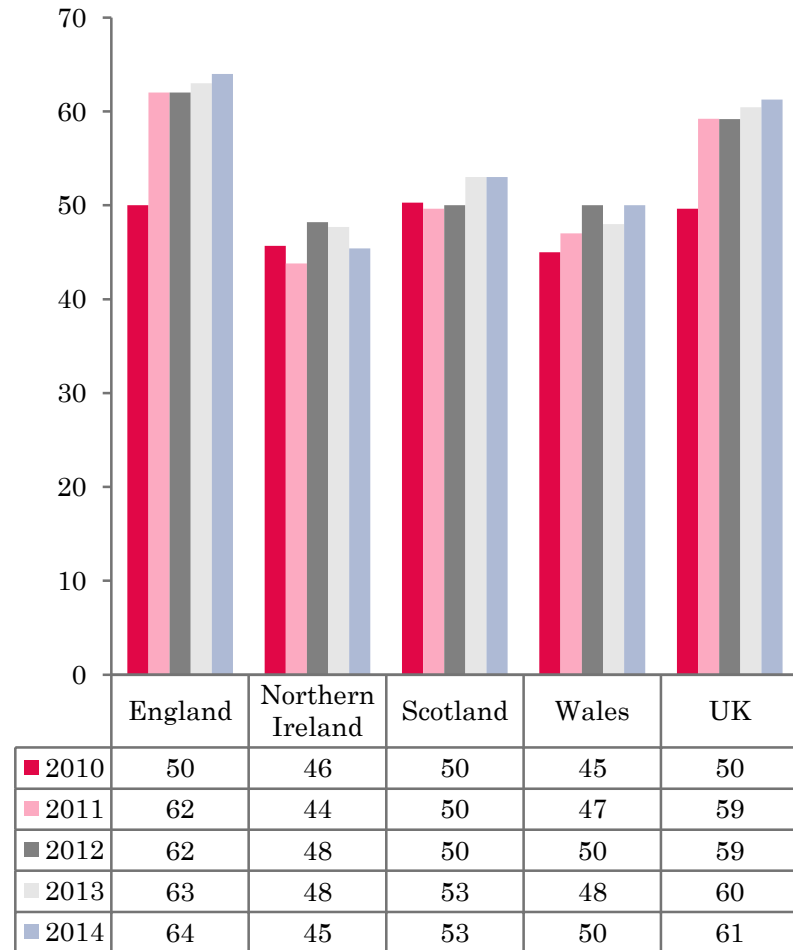
- ❖ 2,501 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ Both UK bedspace (46%) and room occupancy (61%) increased slightly, when compared to March 2013.



NATIONAL BEDSPACE OCCUPANCY MARCH 2010-2014



NATIONAL ROOM OCCUPANCY MARCH 2010-2014



- Bedspace occupancy was at its highest in England (48%) since 2010, mirroring the UK levels during March. In contrast Northern Ireland (31%) was at its lowest since March 2011.
- In the UK during March 2014, both room and bedspace occupancy remained flat when compared to the previous year, witnessing no significant changes in either measures of occupancy.
- Room occupancy in Northern Ireland fell during March 2014, down by 3 percentage points compared to the same month in 2013. Bed occupancy fared worse, down 7 percentage points when compared to the previous year.
- Wales saw little change in bed occupancy levels during March 2014, remaining static at 35 pp compared to 2013, with room occupancy up by 2 percentage points.
- Scotland occupancy levels remained on par with last years' results, neither increasing or decreasing significantly.
- Across the UK as a whole, bedspace occupancy by non-UK residents had fallen when compared with March 2013 (down 2 percentage points). Both England and Northern Ireland mirrored the UK, whilst Wales remained static 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).



Table 1: Occupancy Levels: March 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	46	47	48	62	63	64	1613	1558	1928
Northern Ireland	33	38	31	48	48	45	186	162	170
Scotland	36	39	38	50	53	53	311	310	292
Wales	36	35	35	50	48	50	141	129	111
UK	44	45	46	59	60	61	2251	2159	2501

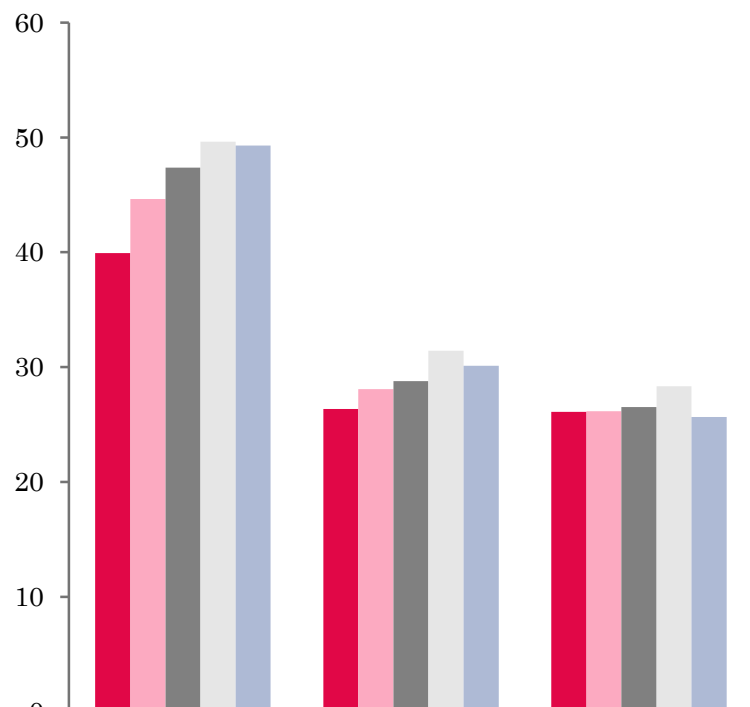
Table 2: UK/Non UK Occupancy Levels March 2012 – 2014 (see note 5a and 5b Slide 19)

	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	32	34	31	5	5	3	9	11	6	13	14	9	1613	1558	1928
Northern Ireland	22	22	18	11	16	14	30	30	42	33	42	44	186	162	170
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	311	310	292
Wales	33	29	31	2	2	2	**	**	**	5	6	5	141	129	111
UK	32	33	31	5	5	3	10	12	7	13	14	10	2251	2159	2501

** FIGURES NOT AVAILABLE

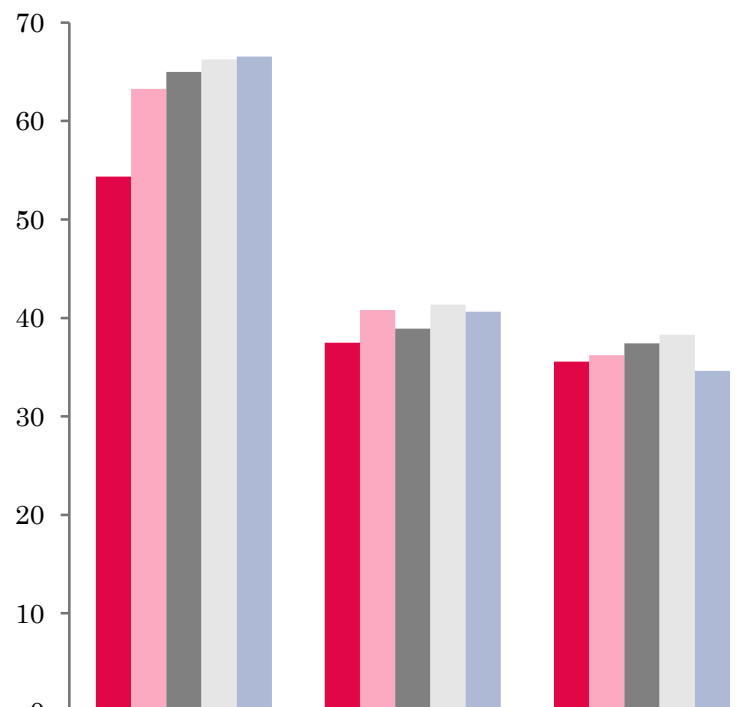


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MARCH 2010-2014



	Hotels	Guesthouses	B&Bs
2010	40	26	26
2011	45	28	26
2012	47	29	27
2013	50	31	28
2014	49	30	26

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



	Hotels	Guesthouses	B&Bs
2010	54	37	36
2011	63	41	36
2012	65	39	37
2013	66	41	38
2014	67	41	35



- Both room and bedspace occupancy levels remained fairly static across hotel and guest house establishment types in March 2014. B&B accommodation witnessed a downturn in both measures of occupancy (Table 3).
- Bedspace occupancy in three out of the six size bandings decreased when compared with the previous year's results. Only the 11-25 size banding increased in bedspace occupancy, up 2 pp's on March 2013. Room occupancy in the 11-25 size band also witnessed an increase, up 4 percentage points, with +100 band also up 2 pp on last years results. The rest of the size bandings either remained static in line with March 2013 data or decreased, with the 51-100 size band dropping 8 percentage points.
- Both room and bed occupancy levels across nearly all location types fell in March 2014 when compared to the same period last year. The most significant of these was in the countryside/village location where room occupancy levels fell by 4 percentage points and 3 pp in bed occupancy. City/Large town fared better with both measures of occupancy increasing by 2 percentage points. (Table 8).
- Three out of the five tariff bands witnessed a drop in bedspace occupancy when compared with March 2013. The largest decrease was in the lowest priced tariff band of £20.00-£29.99, where a 9 percentage point downturn was found. The £20.00-£29.99 tariff band also witnessed the largest downturn in room occupancy, again falling by 9 pp when compared to the same period in 2013. However, room occupancy levels across all other tariff bands either remained constant with 2013 levels or increased slightly, with the £50.00-£59.00 tariff band witnessing an increase of 4 percentage points.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	49	51	51	67	68	68	1003	995	1464
Northern Ireland	39	44	39	57	54	54	66	59	79
Scotland	43	46	45	59	62	64	219	220	218
Wales	42	41	40	58	57	57	77	70	65
UK	47	50	49	65	66	67	1365	1344	1826
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	31	34	33	42	45	45	238	222	182
Northern Ireland	25	20	19	34	26	30	20	8	15
Scotland	23	24	21	30	30	25	43	40	33
Wales	17	18	17	25	24	23	30	24	18
UK	29	31	30	39	41	41	331	294	248
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	29	30	28	41	41	38	372	341	282
Northern Ireland	11	13	7	19	22	14	100	95	76
Scotland	18	23	19	27	29	23	49	50	41
Wales	22	24	17	25	30	25	34	35	28
UK	27	28	26	37	38	35	555	521	427



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: March 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	48	50	50	43	44	44	58	60	68	66	65	58
Northern Ireland	36	43	42	27	32	28	50	55	54	46	52	49
Scotland	39	45	42	33	36	34	48	52	51	52	55	54
Wales	42	40	39	31	29	31	52	50	49	48	46	50
UK	46	49	48	40	42	42	56	58	64	62	62	57



Table 5: Non-UK Percentages: March 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	9	8	11	12	5	12	14	10	14	17	7
Northern Ireland	32	27	35	34	34	38	33	41	44	38	49	48
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	5	4	4	7	6
UK	9	9	9	12	13	6	12	14	10	14	17	8

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Table 6: Occupancy Levels by Size: March 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	24	25	21	183	29	30	27	261	38	36	38	106
Northern Ireland	8	8	6	60	19	22	10	24	28	26	28	30
Scotland	15	18	15	37	25	28	26	51	36	40	39	50
Wales	13	17	19	24	27	25	24	32	40	35	38	20
UK	22	23	20	304	28	29	26	368	38	36	38	206

Table6: Occupancy Levels by Size: March 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	46	49	48	62	49	58	56	35	50	51	53	1281
Northern Ireland	23	25	34	21	39	43	40	23	47	49	39	12
Scotland	42	41	46	52	47	53	50	47	47	50	48	55
Wales	44	44	37	20	42	42	46	10	45	47	40	6
UK	45	47	47	155	48	56	54	115	49	51	51	1354



Table 7: Occupancy Levels by Size: March 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	31	33	29	183	39	39	38	261	52	49	53	106
Northern Ireland	13	15	11	60	22	28	16	24	39	39	38	30
Scotland	21	24	21	37	34	35	31	51	46	51	54	50
Wales	17	23	23	24	32	31	31	32	52	45	51	20
UK	28	31	27	375	37	38	36	368	51	49	53	206

Table 7: Occupancy Levels by Size: March 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	63	65	64	62	67	70	60	35	72	73	75	1281
Northern Ireland	51	41	52	21	56	61	56	23	65	54	56	12
Scotland	56	56	65	52	64	70	68	47	68	71	73	55
Wales	60	59	54	20	62	57	63	10	64	73	68	6
UK	62	63	63	155	66	69	61	115	71	72	74	1354



Table 8: Occupancy Levels by Location Types: March 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	36	39	37	190	53	54	57	734	40	43	41	664	35	40	36	340
Northern Ireland	29	29	25	44	39	45	39	54	22	25	24	50	14	15	12	22
Scotland	35	39	37	34	43	48	46	122	29	31	29	59	29	31	30	77
Wales	41	39	40	29	41	45	38	9	35	36	37	15	29	25	27	58
UK	36	39	37	297	50	52	54	919	38	41	39	788	33	37	34	497

Table 8: Occupancy Levels by Location Types: March 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	48	50	49	190	71	71	73	734	60	60	59	664	49	52	48	340
Northern Ireland	38	37	31	44	58	54	54	54	32	37	35	50	27	27	21	22
Scotland	44	46	49	34	63	68	67	122	41	46	44	59	39	39	36	77
Wales	53	49	51	29	62	69	66	9	52	50	49	15	36	33	39	58
UK	48	49	49	297	69	70	72	919	56	57	56	788	46	49	45	497

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	**	**	**	**	14	21	12	27	24	23	21	113
Northern Ireland	**	**	**	**	13	6	3	16	14	10	8	40
Scotland	**	**	**	**	22	31	25	11	22	25	18	45
Wales	**	**	**	**	11	10	5	3	26	24	21	27
UK	**	**	**	**	15	22	13	57	24	23	20	225

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	33	33	31	138	40	37	38	85	48	50	51	1533
Northern Ireland	30	19	27	30	20	35	36	23	40	45	37	61
Scotland	30	27	28	36	39	46	44	29	44	47	45	171
Wales	31	28	25	16	41	38	39	16	41	42	40	49
UK	32	32	30	220	40	38	39	153	47	49	49	1814

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	**	**	**	**	27	33	23	27	33	30	32	113
Northern Ireland	**	**	**	**	18	7	5	16	19	19	11	40
Scotland	**	**	**	**	30	35	34	11	33	34	27	45
Wales	**	**	**	**	17	15	9	3	31	30	29	27
UK	**	**	**	**	27	32	23	57	33	30	31	225

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	42	43	41	138	54	45	49	85	67	68	68	1533
Northern Ireland	42	28	40	30	44	53	44	23	59	53	55	61
Scotland	40	38	41	36	53	58	60	29	60	64	63	171
Wales	43	43	44	16	55	47	52	16	58	59	58	49
UK	42	42	41	220	54	47	51	153	65	67	66	1814

** 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)

