



UNITED KINGDOM OCCUPANCY SURVEY

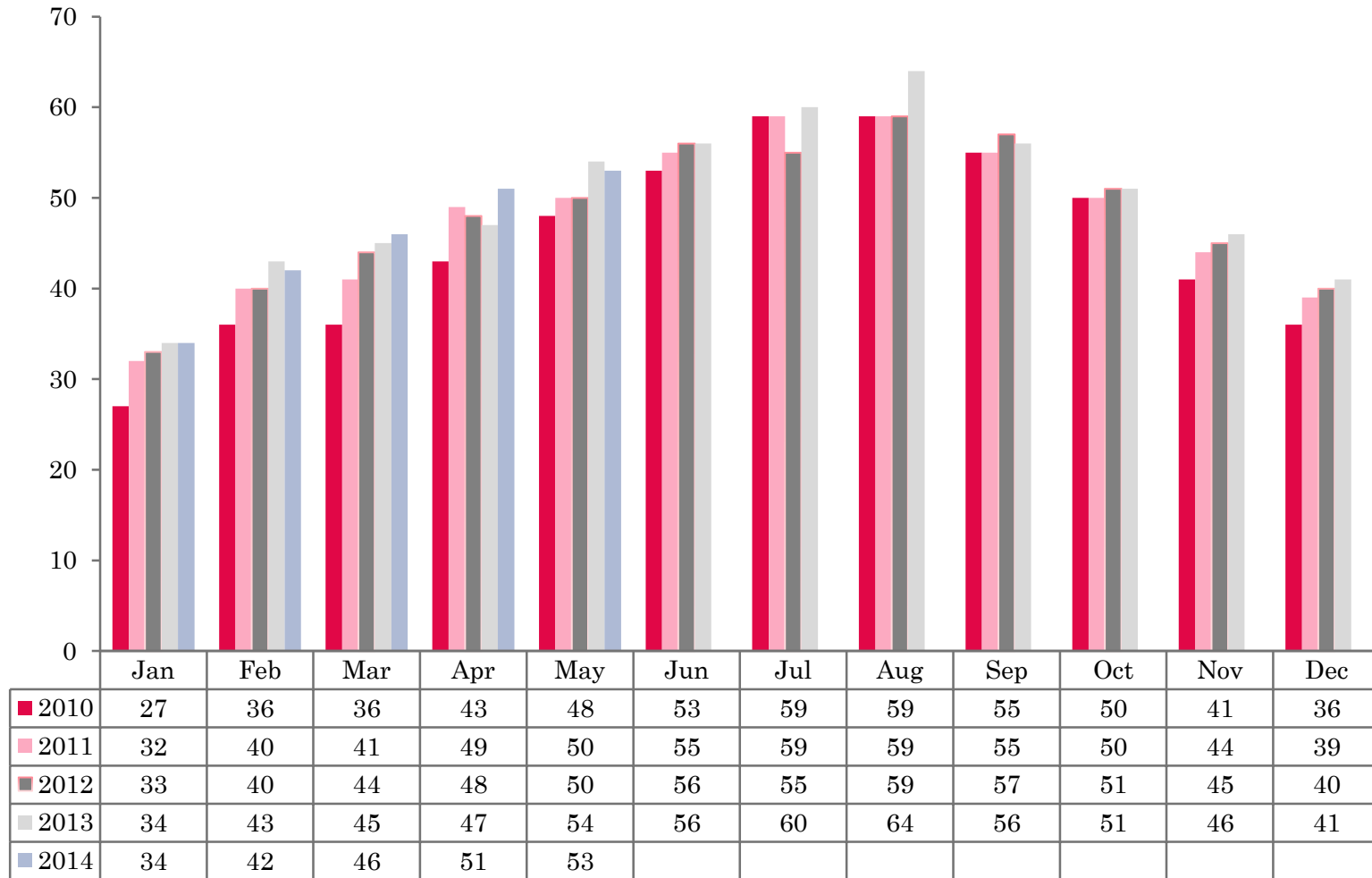
Serviced Accommodation Summary Report
May 2014

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



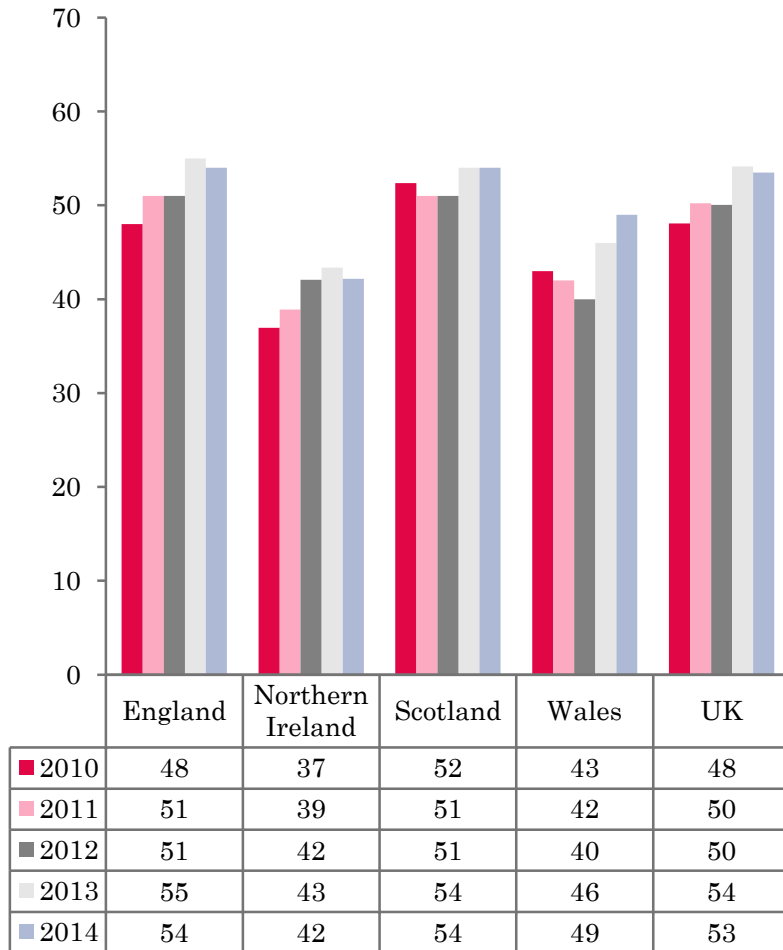
UK BEDROOM OCCUPANCY 2010 - 2014



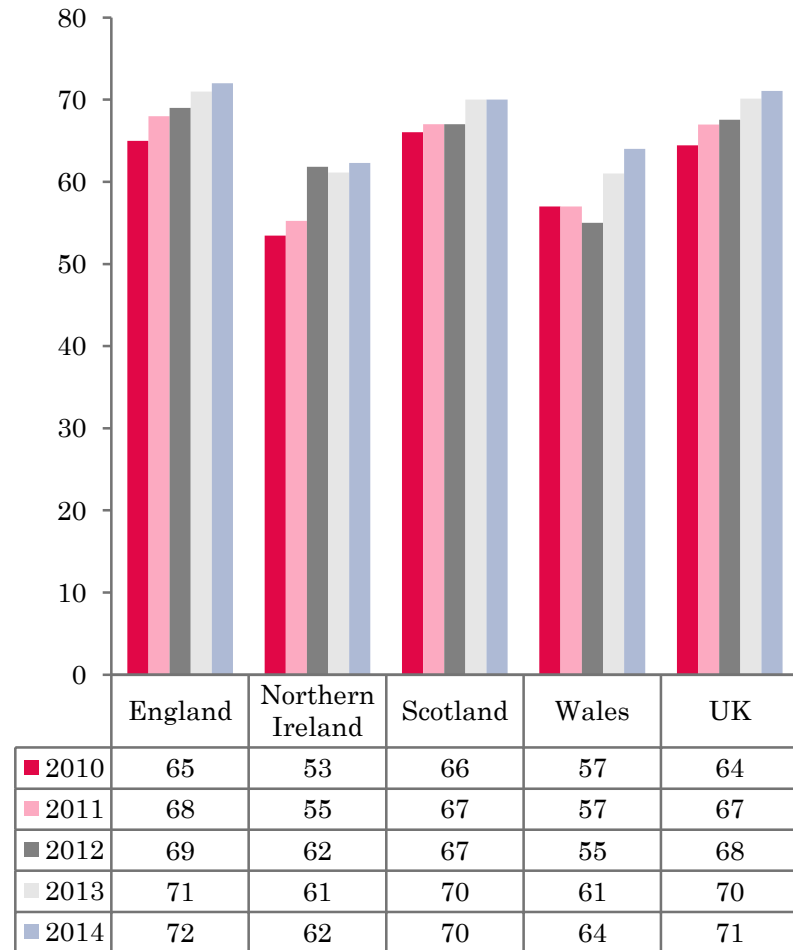
- ❖ 2,537 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (53%) and room occupancy (71%) had remained flat when compared to May 2013.



NATIONAL BEDSPACE OCCUPANCY MAY 2010-2014



NATIONAL ROOM OCCUPANCY MAY 2010-2014



- There was little movement in both bedspace and room occupancy in England, remaining flat (54% and 72%) when compared with May 2013. Bedspace occupancy in Northern Ireland (42%) was again the lowest.
- In the UK during May 2014, room and bedspace occupancy mirrored that of England (room +1% and bedspace occupancy -1%).
- As with England, room occupancy in Northern Ireland saw a marginal increase of 1% during May 2014. Bed occupancy remained on par with the previous year.
- Both room and bedspace occupancy levels increased in Wales during May with both measures of occupancy increasing by 3% compared to the same period in 2013.
- Occupancy levels in Scotland for both room and bedspace occupancy had remained static during May 2014 when compared to the previous year.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained flat when compared with May 2013. England mirrored the UK, whilst Northern Ireland decreased by 1 percentage point. Wales was the only Country to see an increase during May 2014, up by 2 percentage points. (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: May 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	51	55	54	69	71	72	1629	1520	1951
Northern Ireland	42	43	42	62	61	62	166	165	172
Scotland	51	54	54	67	70	70	322	324	293
Wales	40	46	49	55	61	64	148	142	121
UK	50	54	53	68	70	71	2265	2151	2537

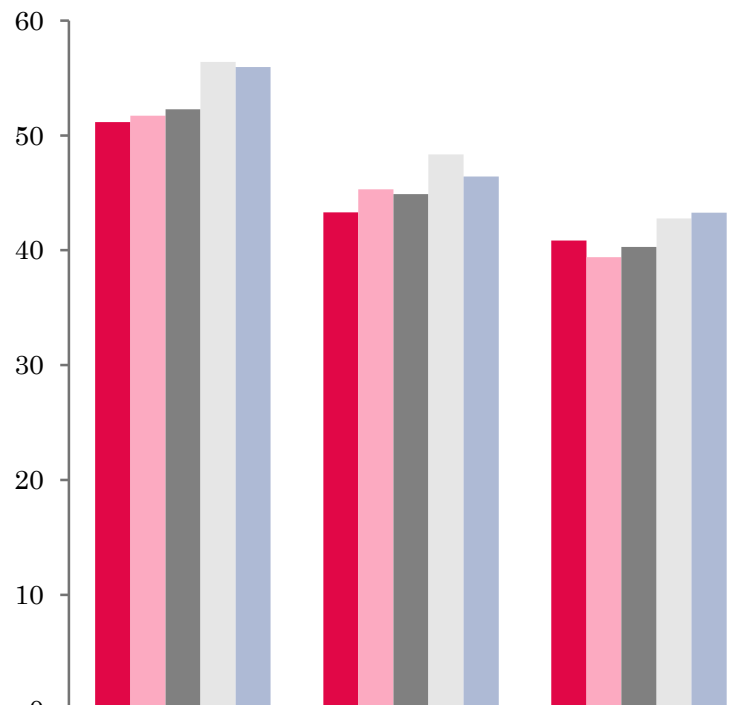
Table 2: UK/Non UK Occupancy Levels May 2012 – 2014 (see note 5a and 5b Slide 19)

	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	39	43	41	8	7	7	14	13	11	17	14	14	1629	1520	1951
Northern Ireland	21	22	22	21	21	20	42	39	45	50	48	48	166	165	172
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	322	324	293
Wales	37	42	42	3	3	5	**	**	**	8	8	10	148	142	121
UK	38	42	41	8	7	7	15	14	12	17	14	15	2265	2151	2537

** FIGURES NOT AVAILABLE

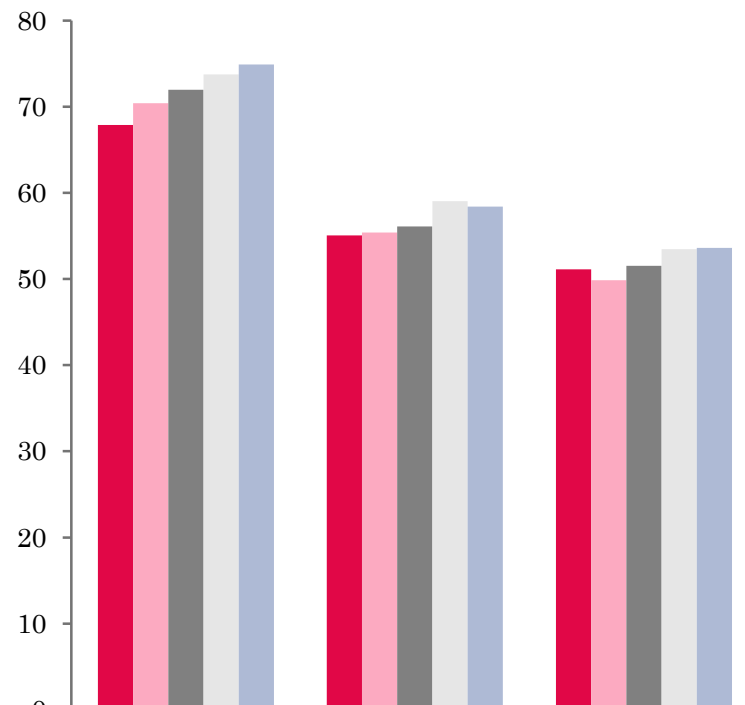


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MAY 2010-2014



	Hotels	Guesthouses	B&Bs
2010	51	43	41
2011	52	45	39
2012	52	45	40
2013	56	48	43
2014	56	46	43

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



	Hotels	Guesthouses	B&Bs
2010	68	55	51
2011	70	55	50
2012	72	56	52
2013	74	59	53
2014	75	58	54



- There was little change in both room and bedspace occupancy levels across all establishment types in May 2014. Room occupancy in both Hotel and B&B establishments had increased by a marginal 1% with bedspace occupancy remaining static for both types of accommodation. Guesthouse accommodation saw bedspace occupancy fall by 2%, down from 48% in May 2013 to 46% in May this year, with room occupancy fairly flat (-1%). (Table 3).
- Across all size bandings, only the 11-25 and 100+ size bands had increased in both measures of occupancy, with the 11-25 banding witnessing the biggest increase, up by 3% in bedspace occupancy and 4% in room occupancy. All other size bandings had fallen or remained static when compared with the previous year's results. The largest of these was in the 1-3 size banding where bedspace occupancy went down by 2% and room by 3 percentage points.
- Only small town locations saw both room and bed occupancy levels increase in May 2014 when compared to the same period last year. Seaside locations saw the most notable decrease in bedspace occupancy, down 5 percentage points on May 2013. (Table 8).
- The £30.00-£39.99 tariff band witnessed the largest increase in both bedspace and room occupancy, up by 6pp respectively when compared to the same period in 2013. The £20.00-£29.99 and £40.00-£49.99 size bands had fallen in both measures of occupancy, whilst the remaining two tariff bands had remained flat when compared to the previous year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	53	57	56	73	74	75	998	966	1476
Northern Ireland	48	48	49	70	69	72	57	60	74
Scotland	53	57	57	72	75	76	214	218	208
Wales	44	49	55	61	68	71	72	71	64
UK	52	56	56	72	74	75	1341	1315	1822
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	46	49	47	57	60	60	245	216	189
Northern Ireland	32	38	33	45	52	45	24	18	21
Scotland	48	51	49	60	61	57	46	46	38
Wales	30	35	36	41	42	44	31	28	24
UK	45	48	46	56	59	58	346	308	272
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	41	43	44	53	54	55	386	338	286
Northern Ireland	22	25	20	33	34	28	85	87	77
Scotland	43	45	47	53	56	56	62	60	47
Wales	32	40	31	38	46	36	45	43	33
UK	40	43	43	52	53	54	578	528	443



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: May 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	56	60	59	47	49	50	67	71	71	70	70	72
Northern Ireland	50	44	50	40	33	36	65	55	65	62	50	57
Scotland	55	60	58	48	51	50	66	71	69	68	70	71
Wales	46	55	56	37	38	41	55	67	68	56	56	60
UK	55	59	58	46	48	49	66	70	70	69	69	71



Table 5: Non-UK Percentages: May 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	10	9	17	16	14	15	13	12	18	17	15
Northern Ireland	45	34	38	52	44	47	53	37	41	46	46	50
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	7	6	8	8	10	11
UK	12	11	10	18	17	15	15	13	12	18	17	16

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Table 6: Occupancy Levels by Size: May 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	37	41	39	195	39	45	45	261	42	45	49	111
Northern Ireland	16	19	19	64	30	38	30	24	32	34	36	33
Scotland	41	40	38	41	46	54	54	53	51	56	58	47
Wales	23	38	35	30	38	40	42	36	39	47	49	21
UK	36	40	38	330	40	46	46	374	43	47	50	212

Table6: Occupancy Levels by Size: May 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	52	58	58	60	57	56	53	37	54	57	58	1287
Northern Ireland	37	38	42	19	49	45	53	21	56	55	49	11
Scotland	53	55	54	55	58	60	57	43	54	58	58	54
Wales	44	53	50	19	47	50	69	10	44	47	55	5
UK	51	57	57	153	56	56	54	111	53	57	58	1357



Table 7: Occupancy Levels by Size: May 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	45	49	47	195	50	56	56	261	56	60	64	111
Northern Ireland	26	26	24	64	37	46	39	24	52	51	44	33
Scotland	52	51	45	41	59	63	64	53	65	69	72	47
Wales	28	43	42	30	47	50	50	36	50	58	60	21
UK	44	49	46	375	51	57	57	374	57	61	65	212

Table 7: Occupancy Levels by Size: May 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	71	74	73	60	75	72	71	37	77	79	80	1287
Northern Ireland	65	62	66	19	72	68	71	21	75	74	81	11
Scotland	70	72	73	55	78	79	76	43	78	81	83	54
Wales	63	70	65	19	70	70	77	10	63	73	83	5
UK	70	73	72	153	75	73	72	111	76	79	81	1357



Table 8: Occupancy Levels by Location Types: May 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	44	54	48	200	57	59	60	1014	46	48	49	386	46	52	51	351
Northern Ireland	40	42	41	42	49	50	49	53	30	30	35	54	19	25	19	23
Scotland	54	58	52	33	54	58	57	118	45	44	50	63	47	53	53	79
Wales	45	53	56	34	37	48	44	10	44	43	56	15	36	40	42	62
UK	45	54	49	309	55	58	58	1195	45	47	49	518	45	51	50	515

Table 8: Occupancy Levels by Location Types: May 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	58	62	65	200	77	78	81	1014	66	67	68	386	60	65	64	351
Northern Ireland	59	55	53	42	72	71	74	53	41	41	46	54	26	38	33	23
Scotland	66	70	64	33	77	79	79	118	60	59	65	63	60	64	63	79
Wales	59	65	66	34	57	69	78	10	63	67	67	15	46	51	53	62
UK	59	63	65	309	75	78	80	1195	64	65	67	518	58	64	63	515

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	**	**	**	**	21	29	30	29	30	30	37	118
Northern Ireland	**	**	**	**	22	18	11	20	27	29	25	41
Scotland	**	**	**	**	35	39	32	9	42	40	45	44
Wales	**	**	**	**	14	34	30	5	34	38	33	32
UK	**	**	**	**	23	31	30	63	32	32	38	235

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	46	49	46	145	47	51	50	82	53	56	56	1545
Northern Ireland	32	33	38	37	29	43	48	22	49	49	48	52
Scotland	55	53	46	37	50	60	57	35	54	59	58	168
Wales	40	40	42	21	46	53	62	15	44	50	56	48
UK	47	49	46	240	47	52	52	154	52	56	56	1813

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	**	**	**	**	34	44	44	29	40	41	49	118
Northern Ireland	**	**	**	**	38	26	13	20	36	35	31	41
Scotland	**	**	**	**	46	54	41	9	58	53	56	44
Wales	**	**	**	**	20	41	41	5	43	47	39	32
UK	**	**	**	**	35	45	43	63	43	43	49	235

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	56	59	57	145	60	61	60	82	73	75	75	1545
Northern Ireland	48	47	52	37	39	59	65	22	72	70	74	52
Scotland	68	66	61	37	65	76	74	35	73	77	76	168
Wales	53	57	60	21	59	67	67	15	62	68	72	48
UK	57	60	58	240	60	64	63	154	72	75	75	1813

** 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)

