



UNITED KINGDOM OCCUPANCY SURVEY

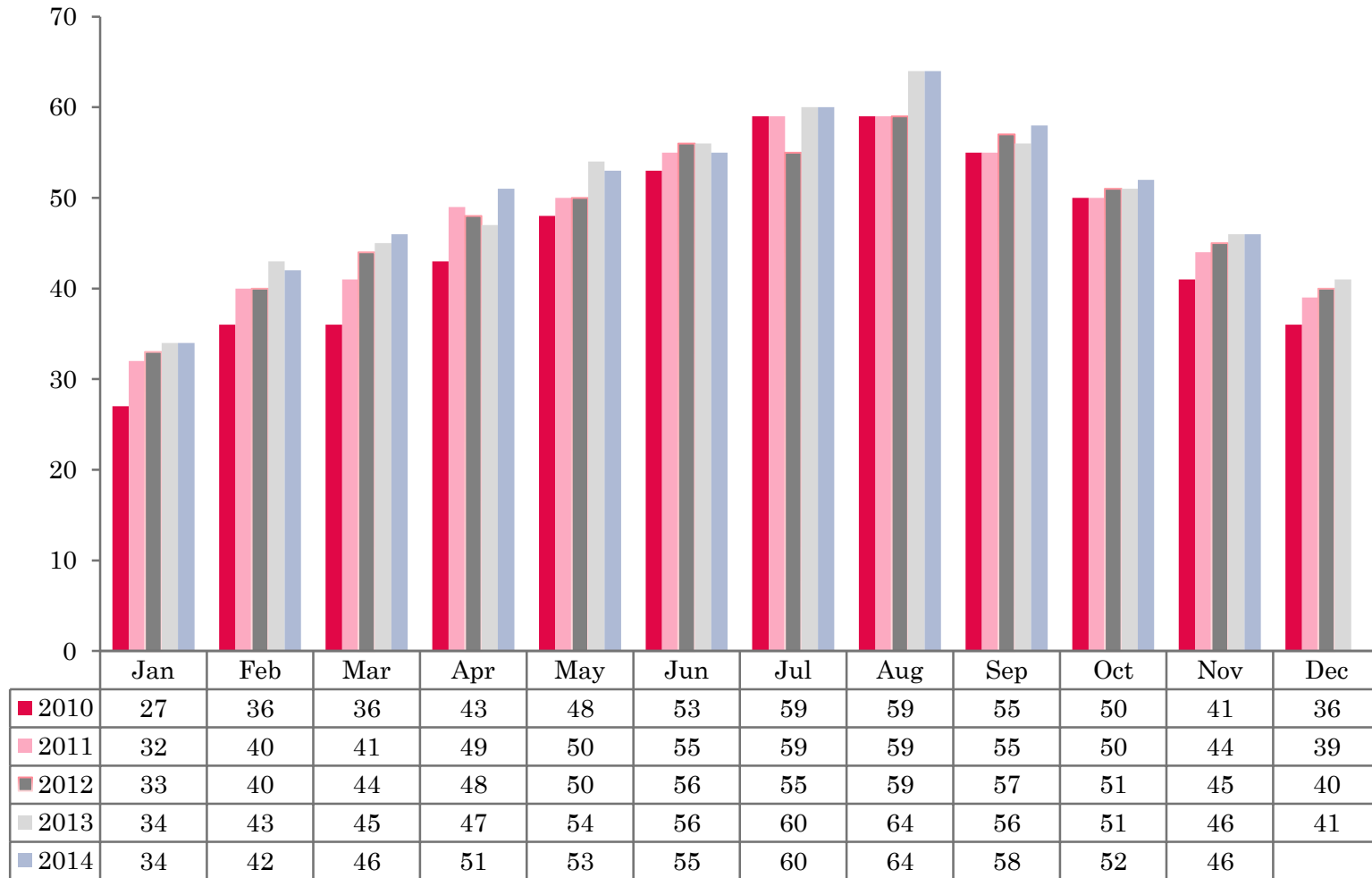
Serviced Accommodation Summary Report
November 2014

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



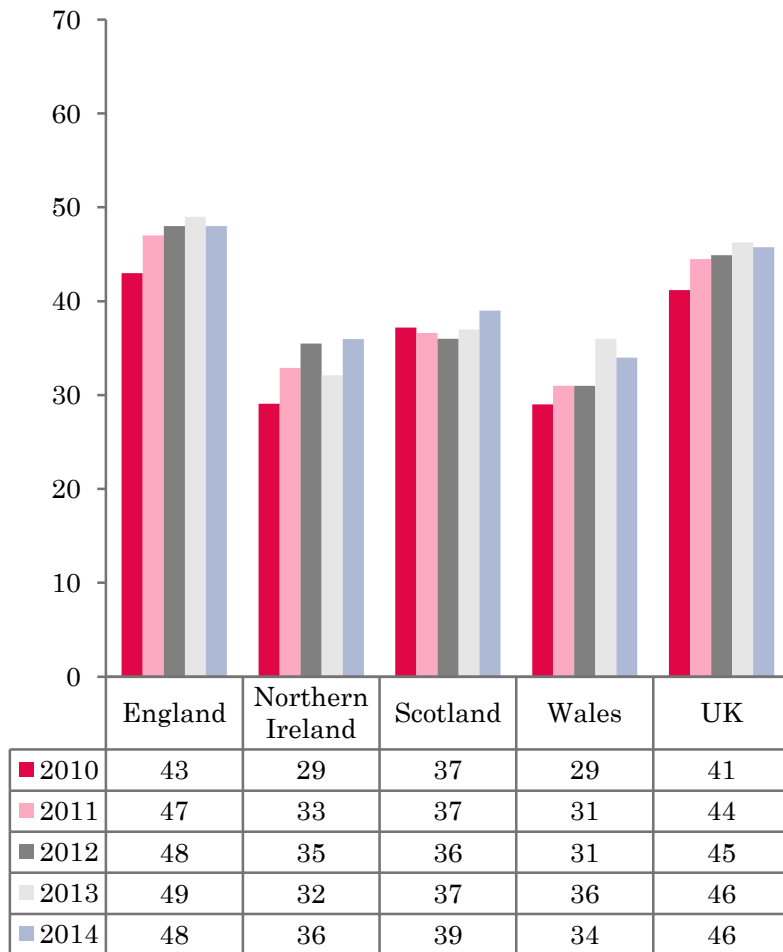
UK BEDROOM OCCUPANCY 2010 - 2014



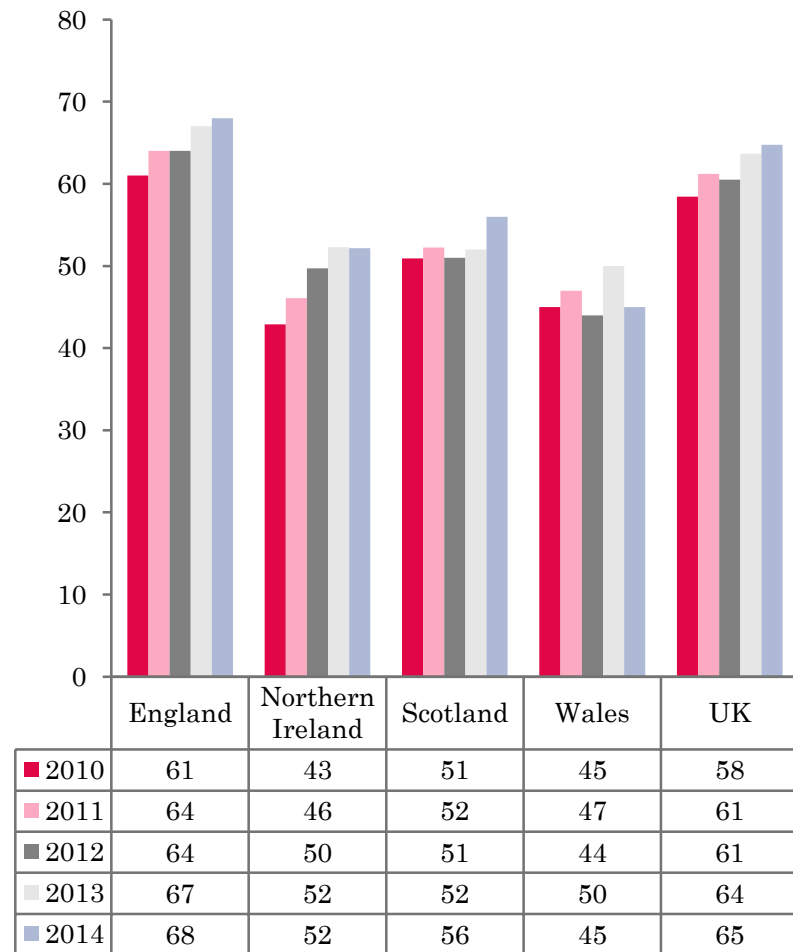
- ❖ 2,370 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (46%) and room occupancy (65%) had both remained fairly static when compared to November 2013.



NATIONAL BEDSPACE OCCUPANCY NOVEMBER 2010-2014



NATIONAL ROOM OCCUPANCY NOVEMBER 2010-2014



- In the UK during November 2014, both room and bedspace occupancy had remained fairly static (0% and +1%) when compared to 2013 data.
- Across England as a whole, bedspace occupancy remained on a par with November 2013 (-1%). Room occupancy mirrored that of the UK, remaining static (+1%) compared to the same period the previous year.
- Northern Ireland bedspace occupancy witnessed an upturn when compared to the same month in 2013, up by 4%. Room occupancy remained on a par with November 2013.
- Wales witnessed a drop in both room and bedspace occupancy levels during November. Room occupancy was down by 5%, with bedspace occupancy levels falling by 2% when compared with the same period in 2013.
- Scotland fared better with an increase in both room and bed occupancy in November 2014. Room occupancy had increased by 4%, with bed occupancy up by 2%.
- Across the UK as a whole, bedspace occupancy by non-UK residents had remained static (-1%) when compared with the previous year. Northern Ireland witnessed a 3 percentage point drop in occupancy levels, whereas England occupancy mirrored UK levels remaining static (-1%). Wales saw no movement remaining flat. (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: November 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	48	49	48	64	67	68	1533	1925	1836
Northern Ireland	35	32	36	50	52	52	144	155	162
Scotland	36	37	39	51	52	56	297	292	271
Wales	31	36	34	44	50	45	110	130	101
UK	45	46	46	61	64	65	2084	2502	2370

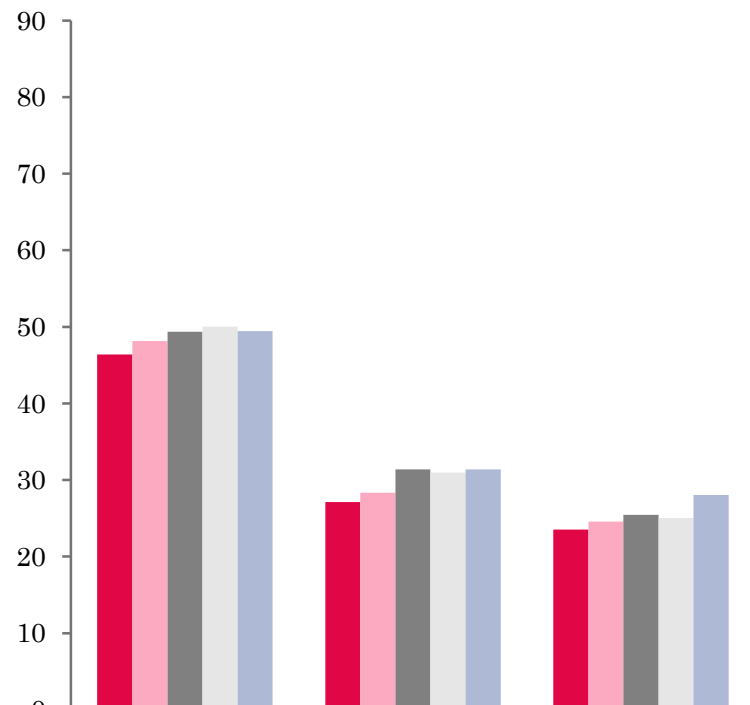
Table 2: UK/Non UK Occupancy Levels November 2012 – 2014 (see note 5a and 5b Slide 19)

	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	33	32	33	5	3	2	9	6	5	13	8	6	1533	1925	1836
Northern Ireland	19	13	20	16	19	16	52	68	36	46	59	44	144	155	162
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	297	292	271
Wales	28	29	29	1	1	1	**	**	**	3	3	3	110	130	101
UK	32	31	32	5	3	2	10	8	6	13	9	7	2084	2502	2370

** FIGURES NOT AVAILABLE

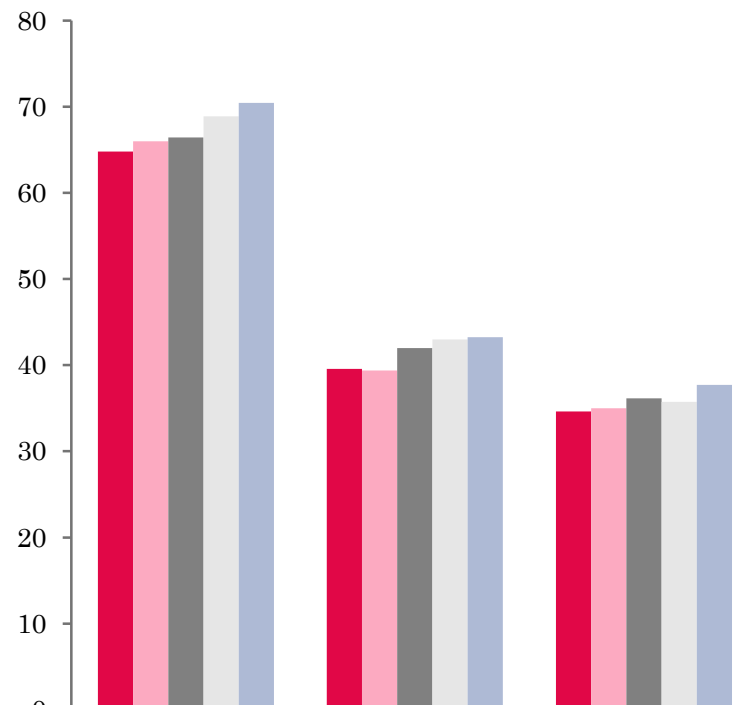


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION NOVEMBER 2010-2014



	Hotels	Guesthouses	B&Bs
2010	46	27	24
2011	48	28	25
2012	49	31	25
2013	50	31	25
2014	49	31	28

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



	Hotels	Guesthouses	B&Bs
2010	65	40	35
2011	66	39	35
2012	66	42	36
2013	69	43	36
2014	70	43	38



- Across all establishments there was very little change in occupancy levels when compared with November 2013. Both Hotel and Guesthouse room and bed occupancy remained flat during November 2014. B&B's fared better with bedspace occupancy up by 3% on 2013 data, with room occupancy also witnessing a 2% increase. (Table 3).
- Occupancy levels in nearly all of the size bands had remained flat in both measures of occupancy when compared to November 2013. The only movement in bedspace occupancy was in the 51-100 size banding where levels were down 3% on the same period last year, this was also the case for room occupancy levels in the same size banding (51-100). The only increase in room occupancy was in the 1-3 size band, where occupancy levels had increased by 2% when compared to November last year.
- Seaside locations saw a fall of 4% in bedspace occupancy during November 2014. This was the only real movement in occupancy levels during this month, with all other locations remaining static. The same was found in room occupancy, with all locations remaining flat when compared to November 2013.
- Bedspace occupancy levels remained fairly static across all tariff bands during November 2014. The £40.00-£49.99 tariff band witnessed a 2% drop in bedspace occupancy, all other tariff bands remained on a par with the same period in 2013. Room occupancy in both the £20.00-£29.99 and £30.00-£39.99 tariff bands had increased when compared to November 2013. The £20.00-£29.99 band had increased by 2% whilst the £30.00-£39.99 tariff had increased by 4%, the largest increase of all the tariff bands. All other tariff bandings had remained static with the exception of the £50.00-£59.99 tariff band which had decreased by 4%.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	52	52	51	69	71	73	986	1471	1438
Northern Ireland	43	38	43	59	61	62	51	70	76
Scotland	42	44	45	60	62	64	214	211	207
Wales	37	42	41	53	59	53	59	70	61
UK	49	50	49	66	69	70	1310	1822	1782
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	35	34	33	47	47	46	205	172	149
Northern Ireland	37	29	22	45	42	30	18	12	18
Scotland	19	20	29	25	29	37	38	34	28
Wales	14	16	17	19	21	24	22	22	18
UK	31	31	31	42	43	43	283	240	213
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	28	27	32	40	39	43	342	282	249
Northern Ireland	12	8	10	18	19	16	82	73	68
Scotland	18	19	14	25	25	20	45	47	36
Wales	16	19	14	21	23	15	29	38	22
UK	25	25	28	36	36	38	498	440	375



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: November 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	50	52	51	44	45	46	61	64	64	67	70	71
Northern Ireland	43	34	46	27	20	32	52	52	59	43	42	53
Scotland	40	41	42	33	34	36	49	50	53	53	55	59
Wales	33	40	40	28	32	27	42	49	46	45	51	42
UK	47	49	49	41	42	43	58	61	61	63	66	67



Table 5: Non-UK Percentages: November 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	5	4	10	7	5	14	7	6	16	10	7
Northern Ireland	54	36	32	59	39	40	47	34	40	52	35	46
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	3	2	4	4	3
UK	9	6	5	11	8	6	14	7	7	16	10	8

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Table 6: Occupancy Levels by Size: November 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	22	24	25	157	28	30	29	225	36	41	40	95
Northern Ireland	10	8	9	58	21	17	14	21	25	24	23	33
Scotland	15	15	12	30	22	25	28	47	35	34	39	41
Wales	12	15	16	22	20	24	24	26	28	39	41	20
UK	20	22	22	267	26	29	28	319	35	40	40	189

Table6: Occupancy Levels by Size: November 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	48	48	49	53	60	47	42	31	53	54	55	1275
Northern Ireland	28	24	39	20	42	36	42	23	49	45	50	7
Scotland	38	38	39	56	49	52	50	41	50	51	54	56
Wales	41	39	37	19	45	43	54	10	39	51	40	4
UK	46	46	47	148	57	47	44	105	52	53	54	1342



Table 7: Occupancy Levels by Size: November 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	30	33	35	157	38	41	41	225	53	57	57	95
Northern Ireland	16	14	14	58	25	34	21	21	37	33	32	33
Scotland	22	23	20	30	29	33	36	47	47	45	51	41
Wales	17	20	17	22	26	29	31	26	38	51	52	20
UK	28	30	32	375	36	39	39	319	51	54	55	189

Table 7: Occupancy Levels by Size: November 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	64	66	67	53	68	66	63	31	75	78	79	1275
Northern Ireland	44	48	50	20	51	58	61	23	70	71	75	7
Scotland	53	57	57	56	69	73	71	41	73	74	78	56
Wales	57	58	50	19	63	61	60	10	60	73	56	4
UK	62	64	64	148	67	67	64	105	74	77	78	1342



Table 8: Occupancy Levels by Location Types: November 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	39	42	36	160	58	57	57	1004	41	43	43	374	37	37	36	298
Northern Ireland	24	24	25	39	43	40	46	53	28	21	19	48	15	11	17	22
Scotland	31	29	35	31	47	51	52	120	26	27	28	51	27	25	28	69
Wales	37	37	40	29	37	51	47	9	34	28	33	14	21	27	27	49
UK	37	40	36	259	55	55	56	1186	38	39	40	487	34	34	34	438

Table 8: Occupancy Levels by Location Types: November 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	51	55	53	160	73	79	80	1004	61	64	63	374	50	51	50	298
Northern Ireland	32	33	34	39	65	65	66	53	31	33	28	48	22	21	27	22
Scotland	43	38	49	31	69	72	76	120	40	42	46	51	35	34	37	69
Wales	48	48	48	29	58	74	58	9	53	43	46	14	28	37	36	49
UK	49	52	52	259	71	77	78	1186	57	59	59	487	46	47	47	438

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	**	**	**	**	28	23	25	25	21	21	21	96
Northern Ireland	**	**	**	**	12	7	13	14	10	9	13	39
Scotland	**	**	**	**	23	21	16	11	20	21	24	36
Wales	**	**	**	**	15	10	8	4	19	21	22	20
UK	**	**	**	**	26	22	23	54	20	21	21	191

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	29	32	30	123	36	39	38	71	52	51	51	1521
Northern Ireland	24	42	21	31	40	34	48	23	43	35	40	55
Scotland	24	28	27	30	34	44	42	27	46	45	47	167
Wales	23	27	18	16	42	39	42	16	36	42	40	45
UK	28	31	29	200	36	40	39	137	50	49	50	1788

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	**	**	**	**	40	32	37	25	31	31	36	96
Northern Ireland	**	**	**	**	17	24	15	14	15	14	18	39
Scotland	**	**	**	**	30	32	19	11	31	33	35	36
Wales	**	**	**	**	20	16	13	4	26	27	27	20
UK	**	**	**	**	37	31	33	54	30	31	35	191

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	37	42	41	123	48	54	50	71	70	71	73	1521
Northern Ireland	36	58	32	31	47	63	68	23	61	57	59	55
Scotland	37	42	43	30	50	64	61	27	63	62	65	167
Wales	32	37	41	16	50	52	51	16	53	60	51	45
UK	37	42	41	200	48	56	52	137	68	69	70	1788

** 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)

