



# UNITED KINGDOM OCCUPANCY SURVEY

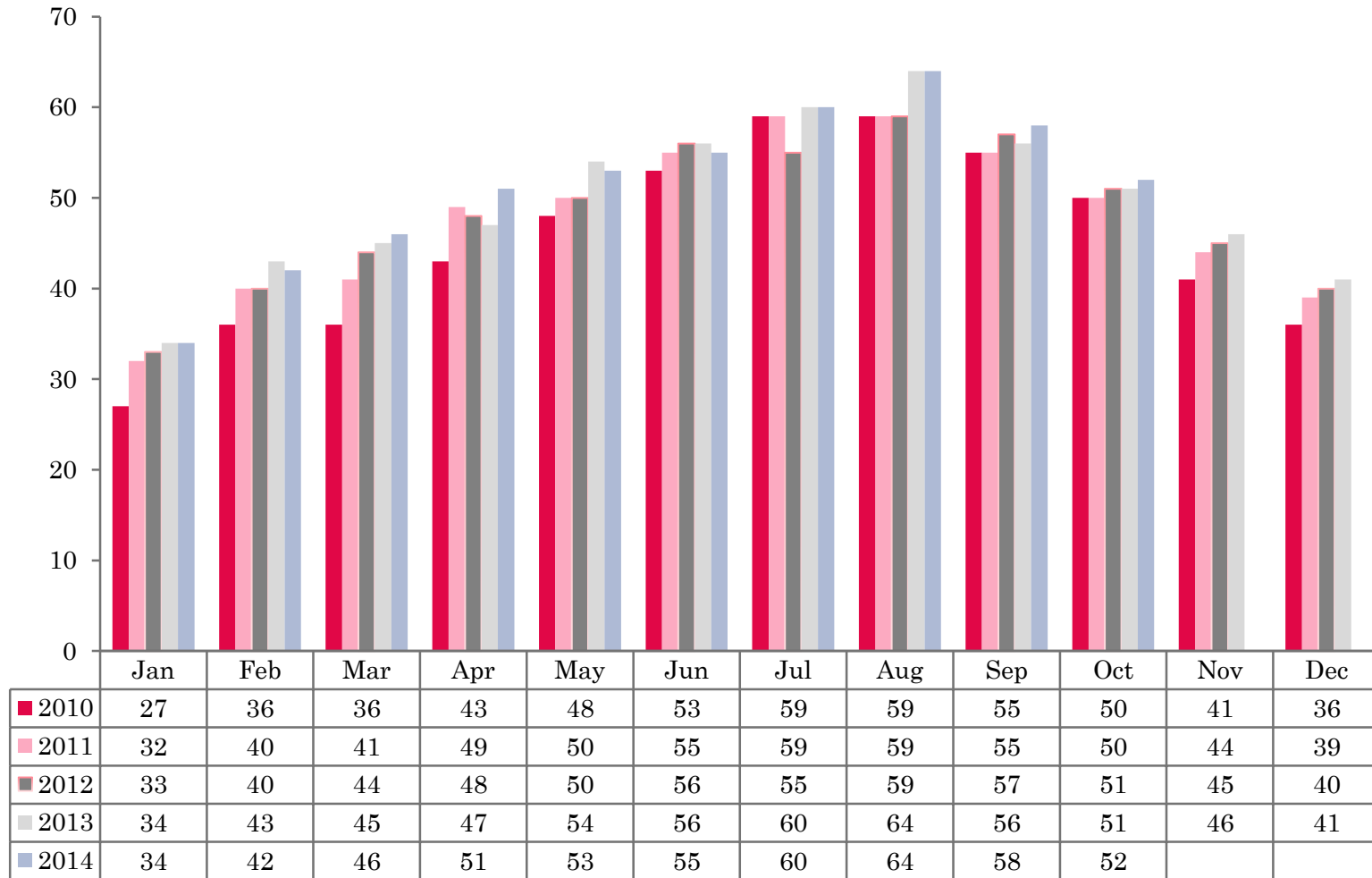
Serviced Accommodation Summary Report  
October 2014

# UK OCCUPANCY SURVEY

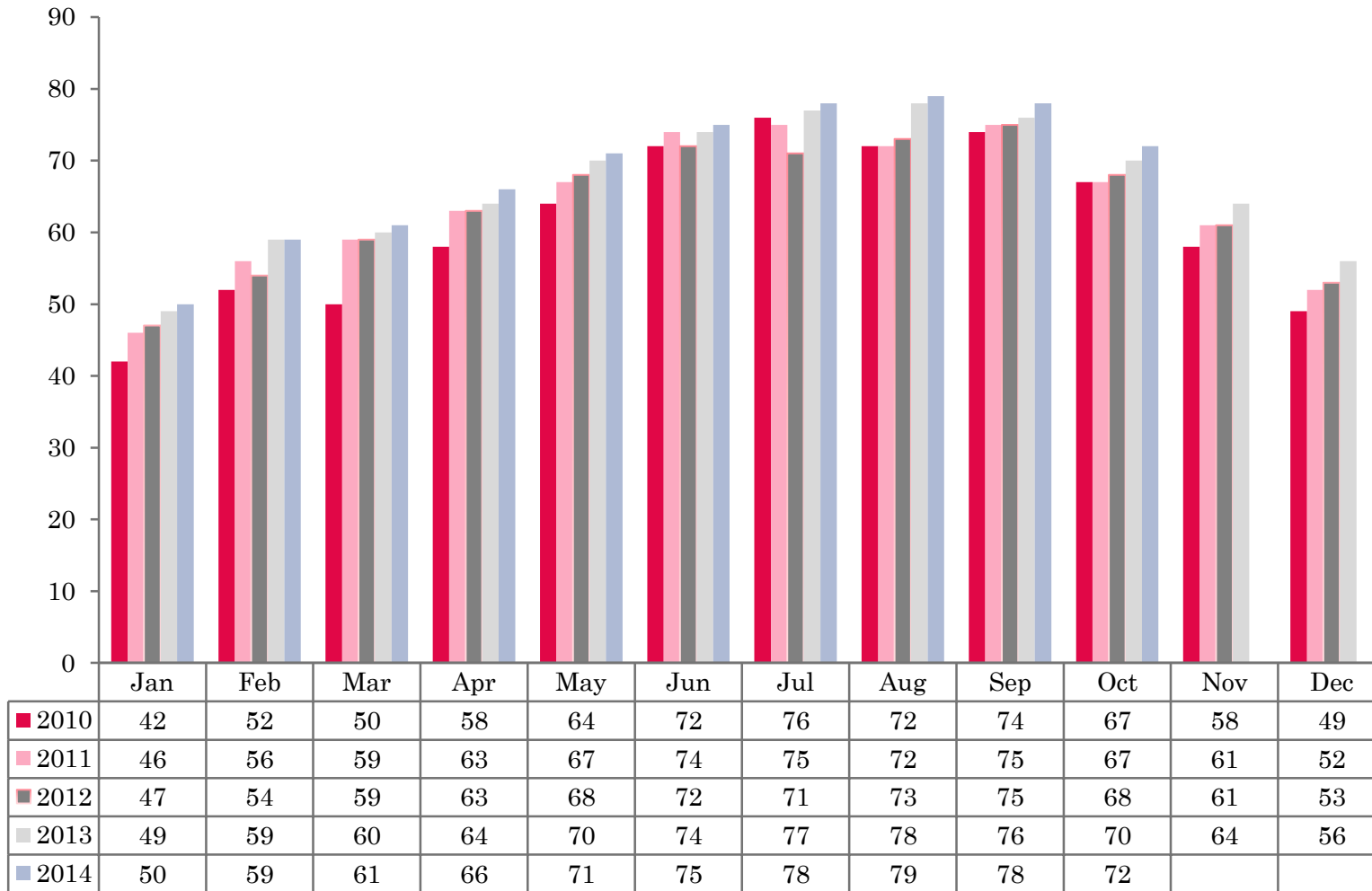
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2010 - 2014



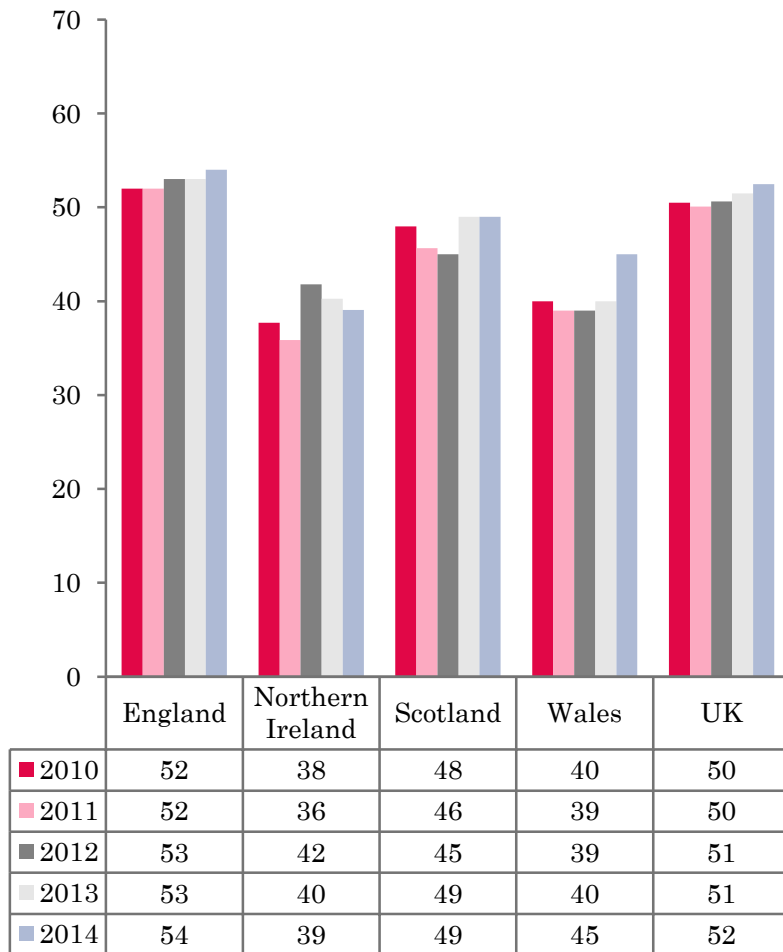
# UK BEDROOM OCCUPANCY 2010 - 2014



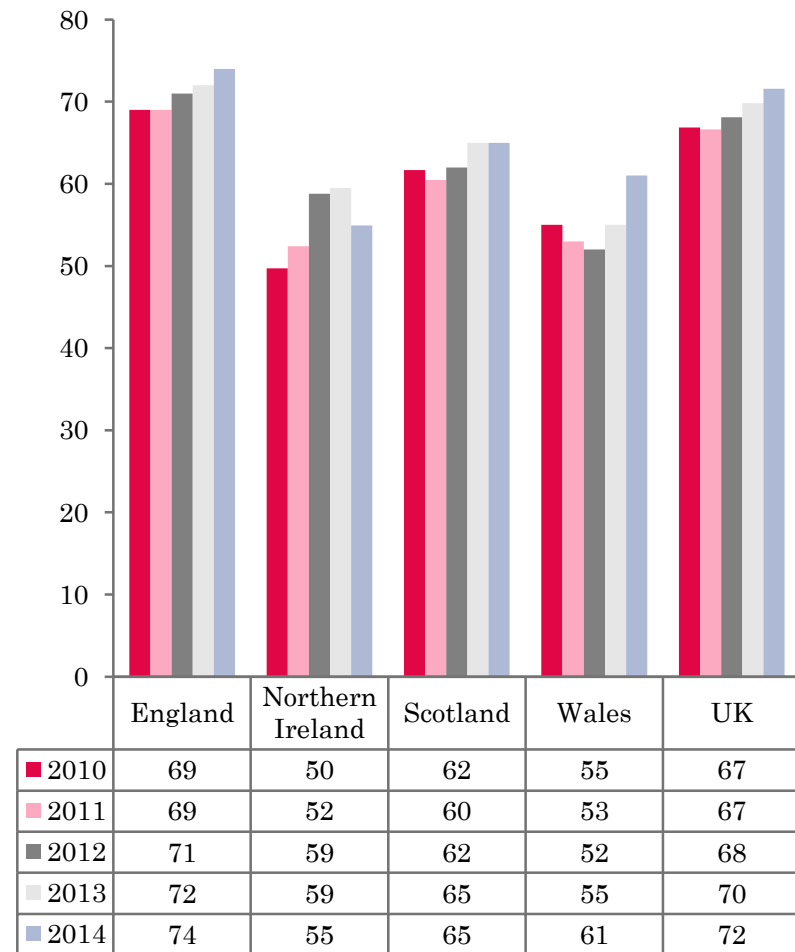
- ❖ 2,468 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (52%) and room occupancy (72%) had both increased when compared to October 2013.



## NATIONAL BEDSPACE OCCUPANCY OCTOBER 2010-2014



## NATIONAL ROOM OCCUPANCY OCTOBER 2010-2014



- In the UK during October 2014, room occupancy had increased by 2% with bedspace occupancy remaining static (+1%).
- Across England as a whole, bedspace occupancy remained on a par with October 2013 (+1%). Room occupancy saw an increase, up from 72% in October 2013 to 74% in October this year.
- Northern Ireland bedspace occupancy remained flat when compared to the same month in 2013, whilst room occupancy fell from 59% to 55% in October 2014.
- Wales witnessed a significant rise in both room and bedspace occupancy levels during October. Room occupancy increased by 6%, with bedspace occupancy up by 5% when compared with the same period in 2013.
- There was little change across Scotland with both room and bed occupancy recording the same levels when compared to October 2013.
- Across the UK as a whole, bedspace occupancy by non-UK residents had decreased by 2% when compared with the previous year. Northern Ireland witnessed a 3 percentage point drop in occupancy levels, whereas England occupancy mirrored UK levels falling by 2%. Wales saw no movement remaining flat (+1%). (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: October 2012 - 2014**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	53	53	54	71	72	74	1580	1998	1897
Northern Ireland	42	40	39	59	59	55	173	166	167
Scotland	45	49	49	62	65	65	307	302	292
Wales	39	40	45	52	55	61	134	141	112
<b>UK</b>	51	51	52	68	70	72	2194	2607	2468

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

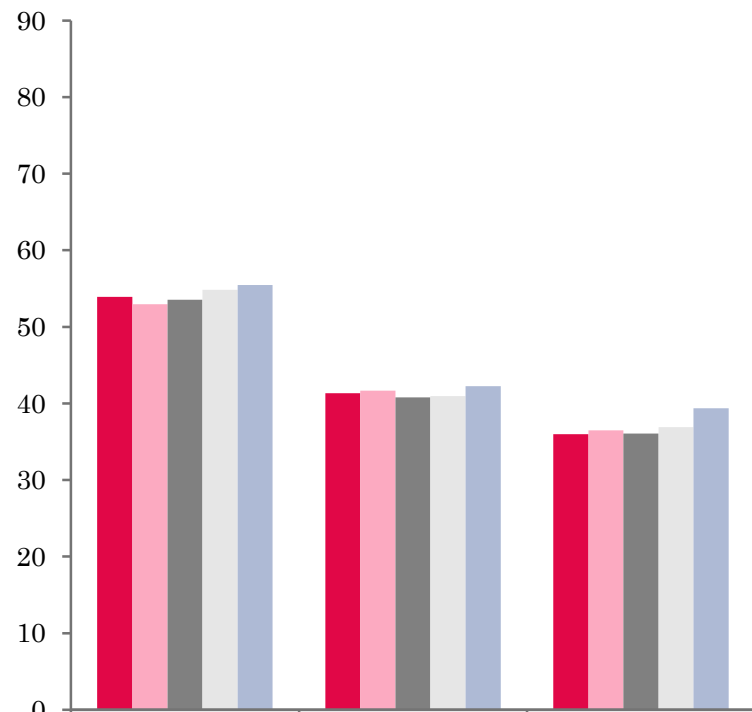
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	41	40	42	6	6	4	9	12	7	12	14	8	1580	1998	1897
Northern Ireland	20	17	19	22	23	20	30	40	40	53	58	51	173	166	167
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	307	302	292
Wales	35	35	39	2	2	3	**	**	**	4	6	6	134	141	112
<b>UK</b>	40	39	41	6	6	4	10	13	8	12	15	9	2194	2607	2468

\*\* FIGURES NOT AVAILABLE



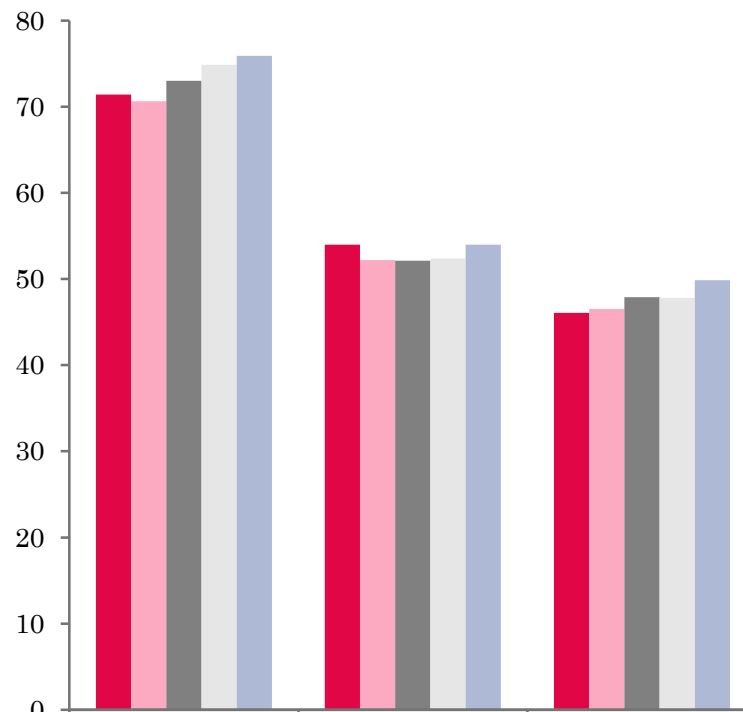


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION OCTOBER 2010-2014



	Hotels	Guesthouses	B&Bs
2010	54	41	36
2011	53	42	37
2012	54	41	36
2013	55	41	37
2014	55	42	39

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION OCTOBER 2010-2014



	Hotels	Guesthouses	B&Bs
2010	71	54	46
2011	71	52	47
2012	73	52	48
2013	75	52	48
2014	76	54	50



- Across all establishments there was very little change when compared with October 2013. Both Hotel and Guesthouse bedspace occupancy remained flat, whilst B&B's increased by 2% on 2013 data. Room occupancy in hotels remained static (+1%), with both Guesthouses and B&B's witnessing an increase of 2% when compared to October 2013 (Table 3).
- Both the 1-3 and 4-10 size bands had increased in both measures of occupancy when compared to October 2013. Overall, the largest increase in bedspace occupancy was in the 51-100 size banding up 3% on the same period last year. The largest increase in room occupancy was in the 4-10 size banding, where levels had again increased by 3% when compared to October last year.
- Seaside locations increased by 5% in bedspace occupancy in October 2014, the most out of the four locations. Small town also witnessed an increase, up by 2% whereas all other locations remained static when compared to the same period in 2013. Similarly, seaside locations also saw the biggest improvement in room occupancy levels this month, up by 4%. All other locations remained static (+1%) when compared with October last year.
- The £20.00-£29.99, £30.00-£39.99 and £50.00-£59.99 tariff bands increased in both measures of occupancy when compared to October 2013. The £20.00-£29.99, £30.00-£39.99 and £50.00-£59.99 tariff bands all increased by 3% in bedspace occupancy. The £30.00-£39.99 tariff band witnessed the biggest increase in room occupancy, up 3% on last year data. All other tariff bands increased by 2% this month, except for the largest tariff band (>£60.00) which remained static (+1%).



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	55	56	56	75	76	77	997	1488	1456
Northern Ireland	46	47	45	65	70	64	63	70	78
Scotland	51	53	55	70	73	74	216	211	207
Wales	45	46	53	60	65	70	76	77	65
<b>UK</b>	54	55	55	73	75	76	1352	1846	1806
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	44	43	45	56	56	58	225	198	168
Northern Ireland	52	33	27	63	44	35	9	17	17
Scotland	32	38	35	42	43	43	41	38	37
Wales	21	22	28	28	29	33	24	22	19
<b>UK</b>	41	41	42	52	52	54	299	275	241
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	38	38	43	51	50	54	358	312	273
Northern Ireland	21	15	17	28	23	23	101	79	72
Scotland	32	39	29	42	46	40	50	53	48
Wales	28	23	24	32	30	27	34	42	28
<b>UK</b>	36	37	39	48	48	50	543	486	421



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: October 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	57	57	49	50	51	69	69	71	72	74	75
Northern Ireland	49	46	49	36	37	37	61	61	59	57	58	54
Scotland	49	53	52	43	47	46	60	64	64	64	66	66
Wales	45	46	50	35	35	41	54	58	62	51	54	61
<b>UK</b>	<b>55</b>	<b>56</b>	<b>56</b>	<b>47</b>	<b>48</b>	<b>49</b>	<b>66</b>	<b>68</b>	<b>69</b>	<b>69</b>	<b>71</b>	<b>73</b>



**Table 5: Non-UK Percentages: October 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	10	5	10	13	8	12	13	7	14	17	9
Northern Ireland	30	38	36	35	44	44	55	52	48	58	56	52
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	5	5	5	7	7
<b>UK</b>	9	11	6	11	14	9	12	13	8	14	17	10

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: October 2012 - 2014**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	33	32	35	177	38	40	43	244	46	49	50	105
Northern Ireland	18	12	12	59	26	32	19	22	30	28	30	30
Scotland	30	30	25	40	34	45	40	54	47	49	50	47
Wales	17	23	27	25	31	30	36	33	36	35	48	21
<b>UK</b>	31	31	33	301	37	40	42	353	45	48	49	203

**Table6: Occupancy Levels by Size: October 2012 - 2014**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	56	57	55	58	58	53	56	29	56	56	58	1284
Northern Ireland	31	29	47	25	47	45	49	21	56	58	46	10
Scotland	47	50	51	52	54	58	58	42	56	57	60	57
Wales	46	44	47	20	51	54	67	9	48	53	56	4
<b>UK</b>	53	55	54	155	57	54	57	101	55	56	58	1355



**Table 7: Occupancy Levels by Size: October 2012 – 2014**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 -3 Rooms</b>				<b>4 – 10 Rooms</b>				<b>11 – 25 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	42	40	44	177	49	51	55	244	61	64	65	105
Northern Ireland	27	18	19	59	30	39	26	22	43	41	44	30
Scotland	40	39	35	40	47	51	49	54	60	61	63	47
Wales	22	29	32	25	39	36	43	33	47	47	61	21
<b>UK</b>	40	39	41	375	48	50	53	353	59	62	64	203

**Table 7: Occupancy Levels by Size: October 2012 - 2014**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 – 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	72	72	75	58	75	71	68	29	80	81	82	1284
Northern Ireland	55	59	60	25	65	64	66	21	74	82	68	10
Scotland	66	68	71	52	74	78	77	42	80	83	84	57
Wales	60	60	63	20	71	74	69	9	66	82	86	4
<b>UK</b>	70	71	73	155	74	72	69	101	79	81	82	1355



**Table 8: Occupancy Levels by Location Types: October 2012 - 2014**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	46	52	181	59	60	60	1009	47	47	49	377	46	47	46	330
Northern Ireland	35	50	34	41	47	31	47	56	28	32	26	47	27	14	27	23
Scotland	42	49	49	34	52	56	56	119	41	38	39	62	38	44	45	77
Wales	41	43	53	32	43	52	55	7	41	38	45	15	34	32	36	58
<b>UK</b>	46	46	51	288	57	58	59	1191	45	45	47	501	44	45	45	488

**Table 8: Occupancy Levels by Location Types: October 2012 - 2014**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	61	59	64	181	78	83	83	1009	68	69	71	377	60	63	62	330
Northern Ireland	46	75	45	41	69	39	65	56	35	43	36	47	38	25	38	23
Scotland	56	60	62	34	75	78	78	119	57	59	54	62	50	52	55	77
Wales	52	55	64	32	63	80	79	7	61	54	59	15	42	42	48	58
<b>UK</b>	59	59	63	288	76	81	82	1191	65	66	67	501	57	59	60	488



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 2012 – 2014 (see note 5a Slide 19)**

**A: Percentage of Bedspace Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	**	**	**	**	38	36	44	24	32	31	34	107
Northern Ireland	**	**	**	**	22	17	11	15	31	14	18	41
Scotland	**	**	**	**	31	36	18	11	32	30	31	50
Wales	**	**	**	**	17	17	21	6	29	24	29	24
<b>UK</b>	**	**	**	**	35	35	38	56	32	30	33	222

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 2012 – 2014 (see note 5a Slide 19)**

**B: Percentage of Bedspace Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	42	43	43	129	47	47	50	83	55	55	55	1554
Northern Ireland	29	26	36	30	33	43	45	25	48	48	44	58
Scotland	38	38	43	35	46	55	56	30	53	56	57	166
Wales	36	28	34	19	44	45	46	14	45	48	54	49
<b>UK</b>	41	41	42	213	46	48	51	152	54	55	55	1827

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 2012 – 2014 (see note 5a Slide 19)**

**A: Percentage of Bedroom Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	**	**	**	**	47	47	52	24	42	42	47	107
Northern Ireland	**	**	**	**	32	23	20	15	41	20	25	41
Scotland	**	**	**	**	46	45	28	11	47	49	43	50
Wales	**	**	**	**	23	22	31	6	37	27	33	24
<b>UK</b>	**	**	**	**	45	45	47	56	42	42	45	222

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 2012 – 2014 (see note 5a Slide 19)**

**B: Percentage of Bedroom Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014	2012	2013	2014	Sample Size 2014
England	52	54	55	129	61	59	62	83	75	76	77	1554
Northern Ireland	41	37	51	30	45	64	61	25	67	72	62	58
Scotland	50	53	57	35	65	70	72	30	72	74	75	166
Wales	46	44	51	19	55	58	61	14	61	68	73	49
<b>UK</b>	51	53	55	213	61	61	63	152	73	75	76	1827

\*\* 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)

