



UNITED KINGDOM OCCUPANCY SURVEY

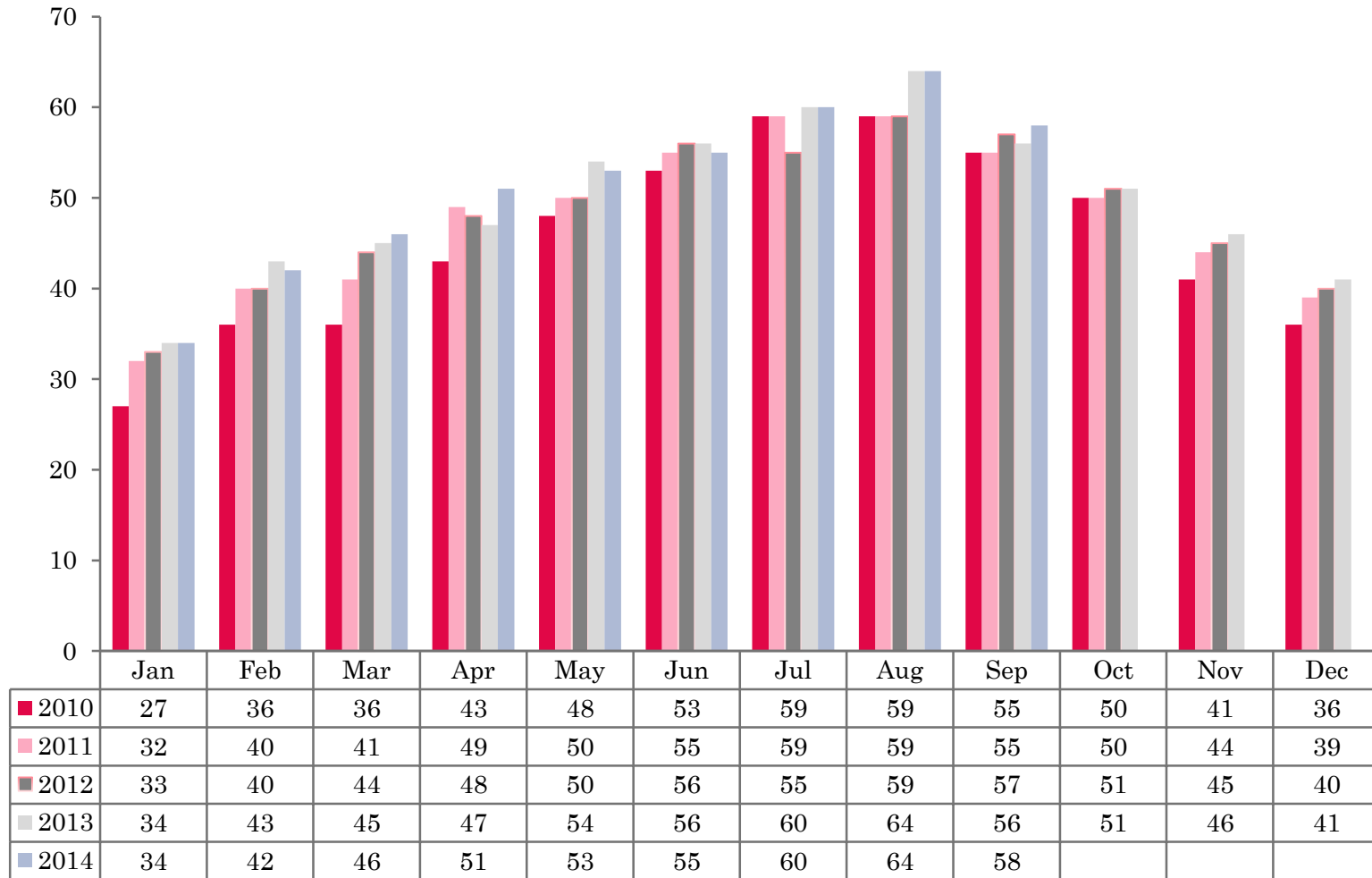
Serviced Accommodation Summary Report
September 2014

UK OCCUPANCY SURVEY

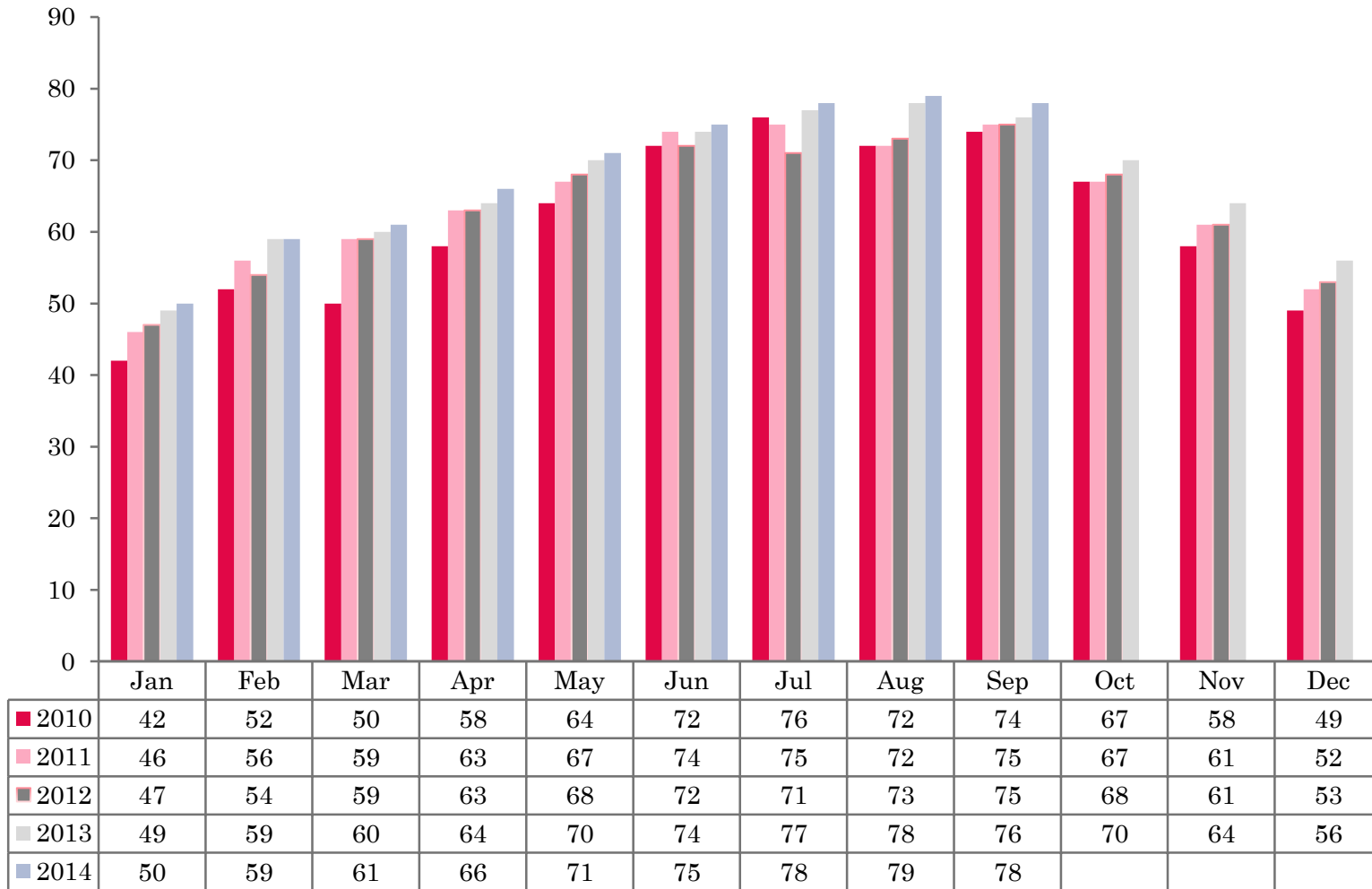
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2010 - 2014



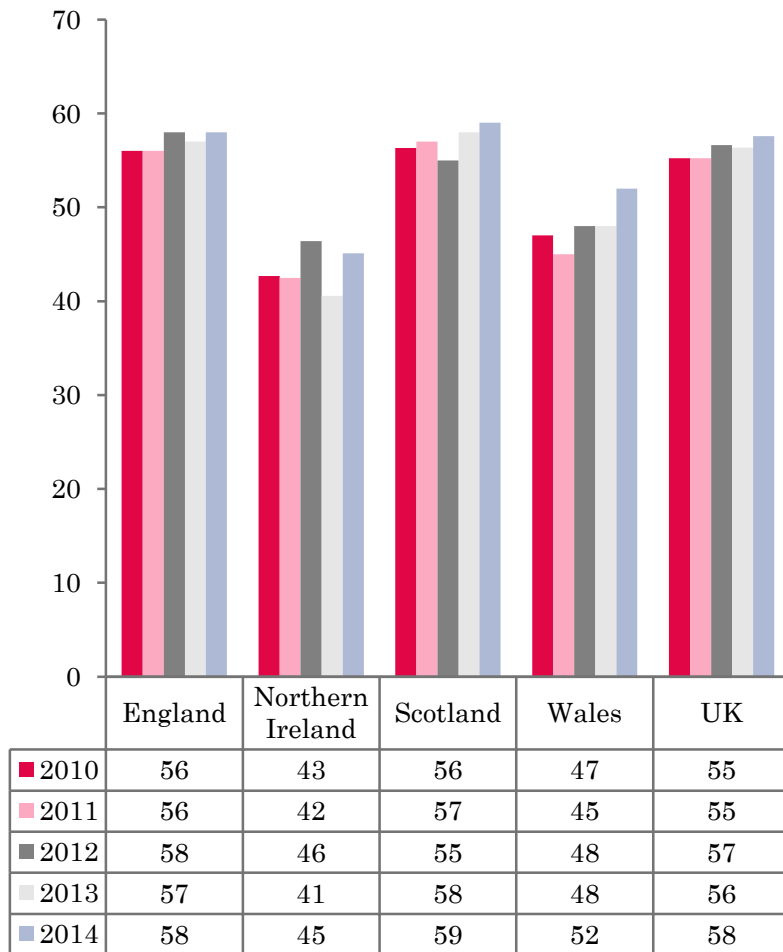
UK BEDROOM OCCUPANCY 2010 - 2014



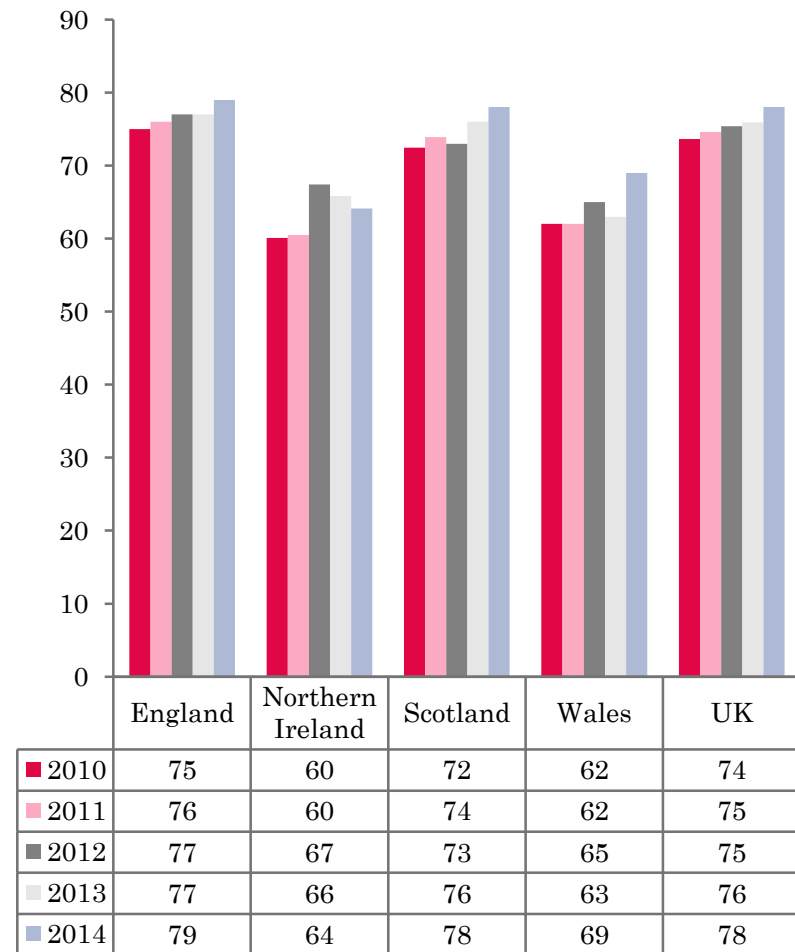
- ❖ 2,500 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).
- ❖ UK bedspace (58%) and room occupancy (78%) had both increased when compared to September 2013.



NATIONAL BEDSPACE OCCUPANCY SEPTEMBER 2010-2014



NATIONAL ROOM OCCUPANCY SEPTEMBER 2010-2014



- In the UK during September 2014, both room and bedspace occupancy increased when compared to September 2013. Both room occupancy and bedspace occupancy had increased by 2%.
- Across England as a whole, bedspace occupancy remained on a par with September 2013 (+1%). Room occupancy fared better, up from 77% in September 2013 to 79% in September this year.
- Northern Ireland bedspace occupancy was up 4% to 45% during September 2014, whilst room occupancy fell from 66% in 2013 to 64%.
- Wales witnessed a significant rise in both room and bedspace occupancy levels during September. Room occupancy increased by 6%, with bedspace occupancy up by 4% when compared with the same period in 2013.
- Room occupancy levels in Scotland had increased by 2% when compared to the same period the previous year. Bedspace occupancy remained flat during September 2014 when compared to 2013, (+1%).
- Across the UK as a whole, bedspace occupancy by non-UK residents had decreased by 3% when compared with the previous year. Northern Ireland witnessed a 4 percentage point increase whereas England occupancy mirrored UK levels falling by 3%. Wales saw no movement remaining at 4% occupancy. (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: September 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	58	57	58	77	77	79	1591	2014	1903
Northern Ireland	46	41	45	67	66	64	175	181	171
Scotland	55	58	59	73	76	78	329	306	306
Wales	48	48	52	65	63	69	138	141	120
UK	57	56	58	75	76	78	2233	2642	2500

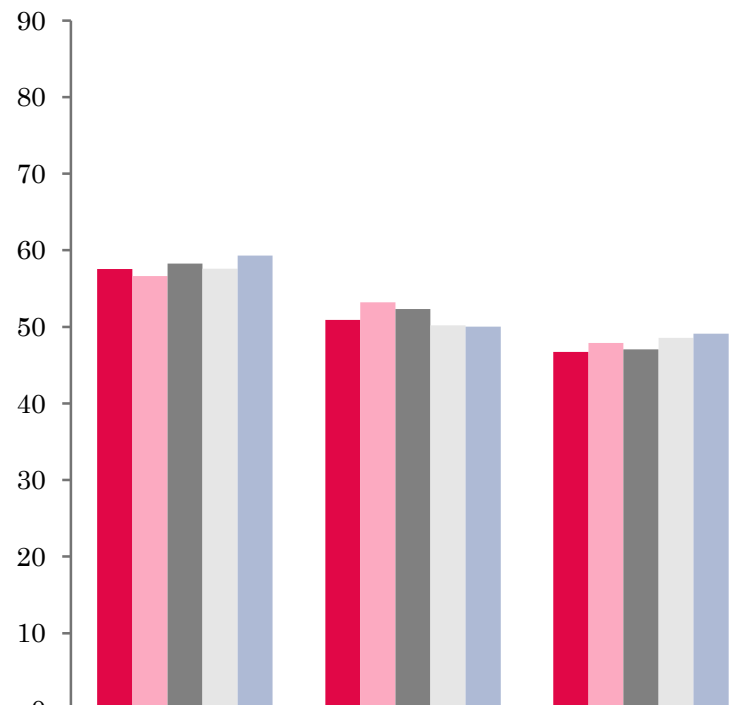
Table 2: UK/Non UK Occupancy Levels September 2012 – 2014 (see note 5a and 5b Slide 19)

	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	47	47	48	9	8	5	12	13	9	15	14	9	1591	2014	1903
Northern Ireland	23	21	21	23	20	24	36	43	44	50	49	53	175	181	171
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	329	306	306
Wales	44	43	48	3	4	4	**	**	**	7	9	8	138	141	120
UK	46	46	47	9	8	5	13	14	10	15	15	10	2233	2642	2500

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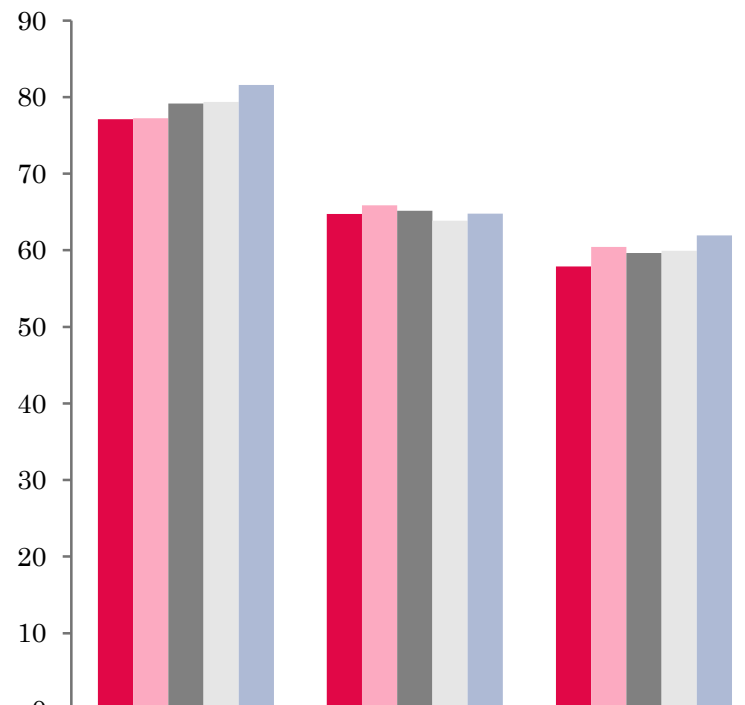


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION SEPTEMBER 2010-2014



	Hotels	Guesthouses	B&Bs
2010	58	51	47
2011	57	53	48
2012	58	52	47
2013	58	50	49
2014	59	50	49

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



	Hotels	Guesthouses	B&Bs
2010	77	65	58
2011	77	66	60
2012	79	65	60
2013	79	64	60
2014	82	65	62



- Across all establishments there was very little change when compared with September 2013. Hotel bedspace occupancy remained fairly flat (+1%) whilst both both guesthouses and B&B's remained on a par with 2013 data. Room occupancy in hotels & and B&B's witnessed an increase of 3% and 2% respectively. Guesthouse room occupancy remained flat (+1%) when compared to September 2013. (Table 3).
- Three out of the six size bands had increased in both measures of occupancy when compared to 2013. The largest increase in bedspace occupancy was in the 11-25 size banding up 3% on the same period last year. The largest increase in room occupancy was also in the 11-25 size banding, where levels again had increased 3% on the same period last year.
- Only small town bedspace occupancy increased in September 2014 (+2%), whereas all other locations remained static when compared to the same period in 2013. Both Seaside and City/Large Town locations saw an improvement in room occupancy levels this month, both increasing by 2%. Small town and countryside/village remained static when compared with September last year.
- The £20.00-£29.99, £50.00-£59.99 and >£60.00 tariff bands increased in both measures of occupancy when compared to September 2013. The £20.00-£29.99 tariff band increased 2% in bedspace and 5% in room occupancy, the £50.00-£59.99 tariff band increased by 3% in bedspace occupancy and 5% in room occupancy, and the >£60.00 increased by 2% in both measures of occupancy. All other size bandings witnessed a slight downturn in occupancy levels or had remained static when compared to September 2013.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	59	58	59	80	80	82	995	1482	1451
Northern Ireland	52	46	51	76	75	73	63	75	79
Scotland	58	59	63	79	80	83	223	212	214
Wales	53	52	57	71	70	75	70	74	69
UK	58	58	59	79	79	82	1351	1843	1813
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	54	50	50	67	65	66	233	206	174
Northern Ireland	44	42	33	59	55	45	17	18	17
Scotland	52	56	55	64	65	66	46	41	36
Wales	37	39	43	49	47	51	26	24	19
UK	52	50	50	65	64	65	322	289	246
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	49	49	51	63	61	64	363	326	278
Northern Ireland	26	20	26	35	30	36	95	88	75
Scotland	47	55	48	55	64	62	60	53	56
Wales	32	35	33	40	44	41	42	43	32
UK	47	49	49	60	60	62	560	510	441



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: September 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	61	59	61	55	54	54	73	72	76	80	80	80
Northern Ireland	50	47	53	42	36	42	66	70	68	66	63	63
Scotland	57	61	63	54	56	57	70	73	78	75	78	79
Wales	51	52	57	45	45	47	64	62	70	66	64	68
UK	59	59	61	54	54	54	72	72	76	78	78	79



Table 5: Non-UK Percentages: September 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	10	11	6	15	16	11	14	14	8	17	17	10
Northern Ireland	33	39	39	43	49	48	53	38	54	60	45	61
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	8	7	8	10	9
UK	11	12	7	16	17	12	14	14	9	17	17	11

** FIGURES NOT AVAILABLE



Table 6: Occupancy Levels by Size: September 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	44	45	45	182	50	50	52	247	56	53	55	107
Northern Ireland	17	18	22	63	44	31	28	22	36	32	33	30
Scotland	44	45	43	46	52	62	57	60	60	58	63	47
Wales	29	34	34	30	44	42	46	33	46	45	53	23
UK	42	44	44	321	50	51	52	362	56	53	56	207

Table6: Occupancy Levels by Size: September 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	63	63	61	59	64	57	58	32	58	60	58	1276
Northern Ireland	38	35	50	24	49	37	51	22	61	57	54	11
Scotland	58	58	62	52	61	62	65	45	57	59	62	56
Wales	54	54	51	20	54	57	69	10	55	54	63	4
UK	61	61	60	155	63	57	59	109	58	59	59	1347



Table 7: Occupancy Levels by Size: September 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	54	53	55	182	62	63	66	247	70	70	72	107
Northern Ireland	24	25	31	63	55	44	44	22	54	51	46	30
Scotland	50	54	57	46	66	71	68	60	74	72	78	47
Wales	37	41	41	30	54	51	58	33	63	59	64	23
UK	52	52	54	375	62	63	65	362	70	69	72	207

Table 7: Occupancy Levels by Size: September 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	79	79	79	59	82	75	77	32	82	83	85	1276
Northern Ireland	67	63	70	24	73	71	72	22	86	85	77	11
Scotland	75	80	83	52	82	84	86	45	85	88	89	56
Wales	72	72	69	20	80	73	76	10	76	79	91	4
UK	78	78	79	155	82	76	78	109	82	84	86	1347



Table 8: Occupancy Levels by Location Types: September 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	57	59	56	187	62	60	61	1005	52	51	53	382	56	56	56	329
Northern Ireland	46	41	44	40	52	46	52	59	34	29	32	50	24	17	25	22
Scotland	57	60	60	39	59	62	64	122	49	47	50	62	53	58	57	83
Wales	54	53	61	33	50	52	59	7	46	48	59	15	43	42	43	65
UK	57	58	57	299	61	60	61	1193	51	50	52	509	54	55	55	499

Table 8: Occupancy Levels by Location Types: September 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	73	71	73	187	82	83	85	1005	74	74	75	382	70	71	70	329
Northern Ireland	64	60	59	40	77	77	74	59	46	43	45	50	38	31	36	22
Scotland	68	74	75	39	83	86	89	122	66	66	69	62	65	70	70	83
Wales	68	67	74	33	72	74	85	7	71	69	71	15	54	52	54	65
UK	72	71	73	299	81	83	85	1193	72	72	73	509	68	69	68	499

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	**	**	**	**	43	35	38	28	41	39	40	111
Northern Ireland	**	**	**	**	26	22	24	17	34	22	29	43
Scotland	**	**	**	**	37	52	44	12	46	47	47	46
Wales	**	**	**	**	23	21	36	5	35	38	37	31
UK	**	**	**	**	40	37	39	62	41	40	41	231

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	57	53	54	127	56	53	56	78	59	58	59	1539
Northern Ireland	38	32	32	32	33	43	49	20	53	46	51	59
Scotland	55	55	53	39	55	67	65	32	60	61	64	177
Wales	47	41	34	19	59	51	72	15	54	55	60	50
UK	56	52	52	217	56	55	58	145	59	58	60	1825

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	**	**	**	**	53	48	54	28	55	54	54	111
Northern Ireland	**	**	**	**	30	31	40	17	46	30	39	43
Scotland	**	**	**	**	45	66	57	12	63	61	60	46
Wales	**	**	**	**	34	28	53	5	47	49	47	31
UK	**	**	**	**	50	49	54	62	55	54	54	231

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	69	68	68	127	69	67	72	78	80	79	81	1539
Northern Ireland	55	46	46	32	50	68	68	20	79	77	73	59
Scotland	68	68	70	39	73	81	84	32	80	82	83	177
Wales	58	56	57	19	70	63	75	15	73	73	79	50
UK	68	67	67	217	69	69	74	145	79	79	81	1825

** 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)

