



UNITED KINGDOM OCCUPANCY SURVEY

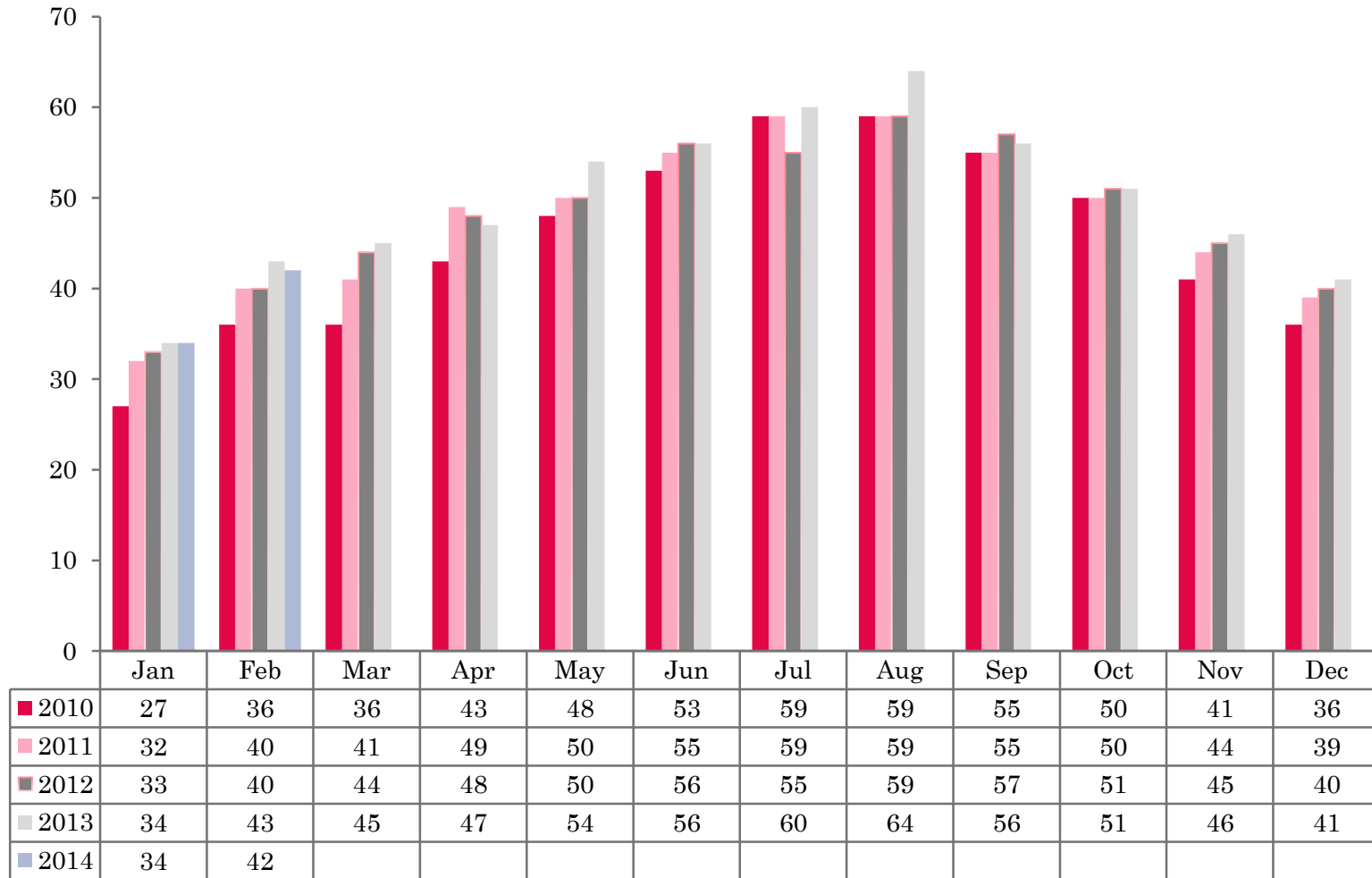
Serviced Accommodation Summary Report
February 2014

UK OCCUPANCY SURVEY

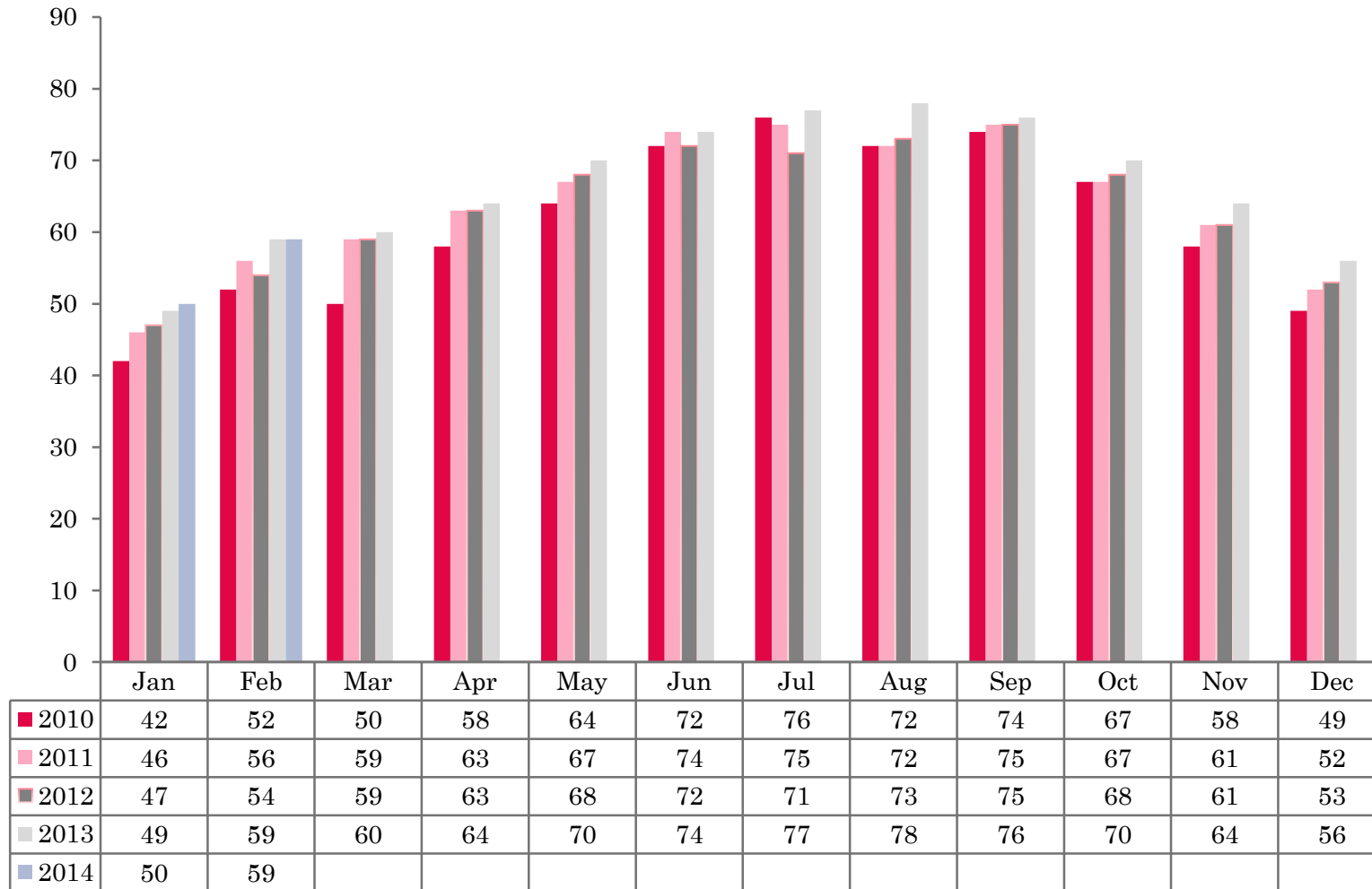
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2010 - 2014



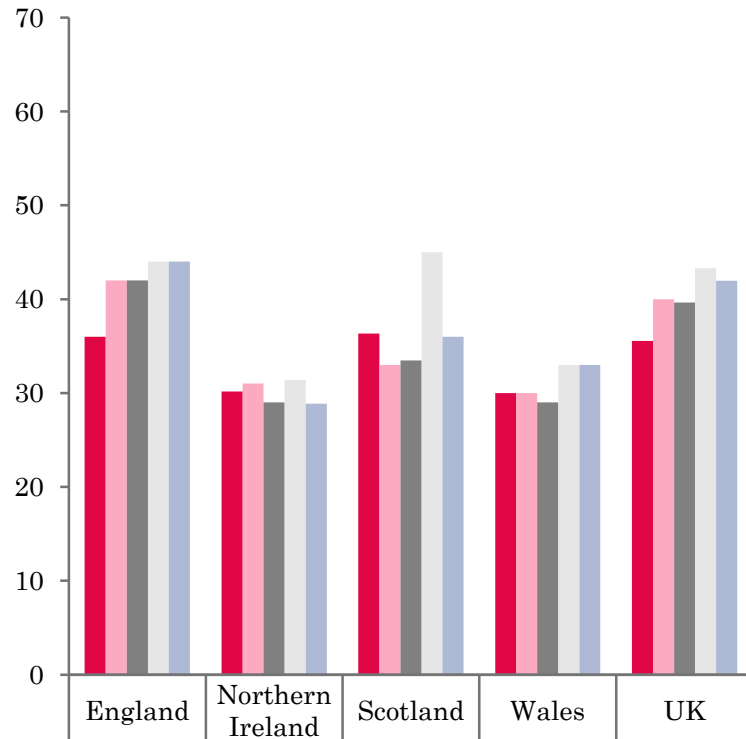
UK BEDROOM OCCUPANCY 2010 - 2014



- ❖ 2,512 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 (42%) and room occupancy (59%) remained flat when compared to February 2013.

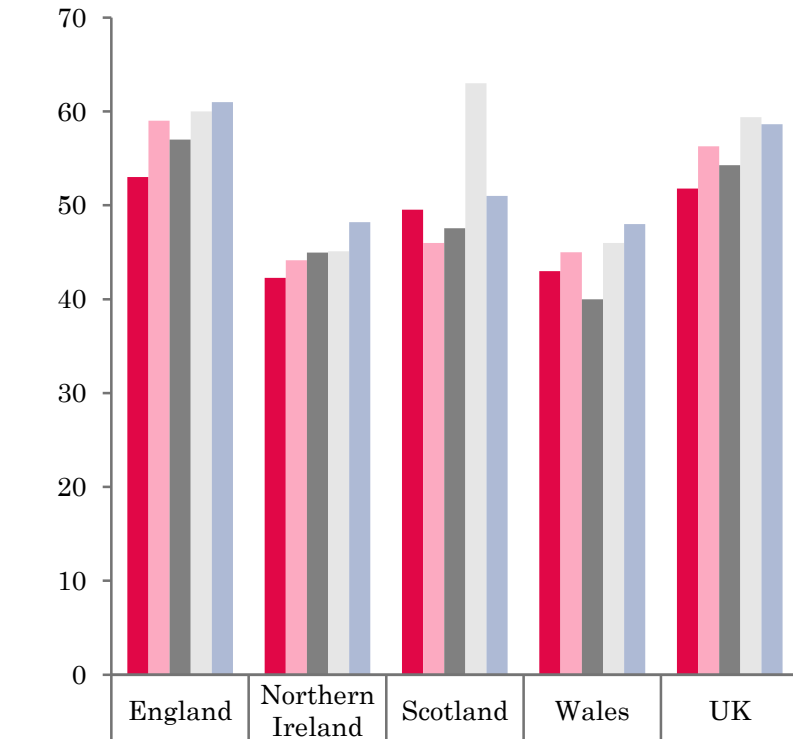


NATIONAL BEDSPACE OCCUPANCY FEBRUARY 2010-2014



	England	Northern Ireland	Scotland	Wales	UK
2010	36	30	36	30	36
2011	42	31	33	30	40
2012	42	29	33	29	40
2013	44	31	45	33	43
2014	44	29	36	33	42

NATIONAL ROOM OCCUPANCY FEBRUARY 2010-2014



	England	Northern Ireland	Scotland	Wales	UK
2010	53	42	50	43	52
2011	59	44	46	45	56
2012	57	45	48	40	54
2013	60	45	63	46	59
2014	61	48	51	48	59



- Bedspace occupancy varied from 44% in England to 29% in Northern Ireland during February 2014.
- In the UK during February 2014, both room and bedspace occupancy remained constant with the previous year, witnessing no significant changes in either measures of occupancy.
- Room occupancy in Northern Ireland increased during February 2014, up by 3 percentage points compared to the same month in 2013. However, bed occupancy was down slightly by 2 percentage points when compared to the previous year.
- Wales fared the best in occupancy levels in February 2014, with bed occupancy remaining flat, and room occupancy up by 2 percentage points.
- Scotland witnessed a significant downturn in both room and bedspace occupancy in February 2014. Bedspace occupancy was down 9 percentage points on February 2013 with room occupancy falling by 12 percentage points when compared to the same period the previous year.
- Across the UK as a whole, bedspace occupancy by non-UK residents had fallen when compared with February 2013 (down 3 percentage points). England mirrored the UK, whilst Northern Ireland witnessed the biggest increase of 4 percentage points. 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: February 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	42	44	44	57	60	61	1582	1483	1912
Northern Ireland	29	31	29	45	45	48	176	142	201
Scotland	33	45	36	48	63	51	297	286	285
Wales	29	33	33	40	46	48	121	121	114
UK	40	43	42	54	59	59	2176	2032	2512

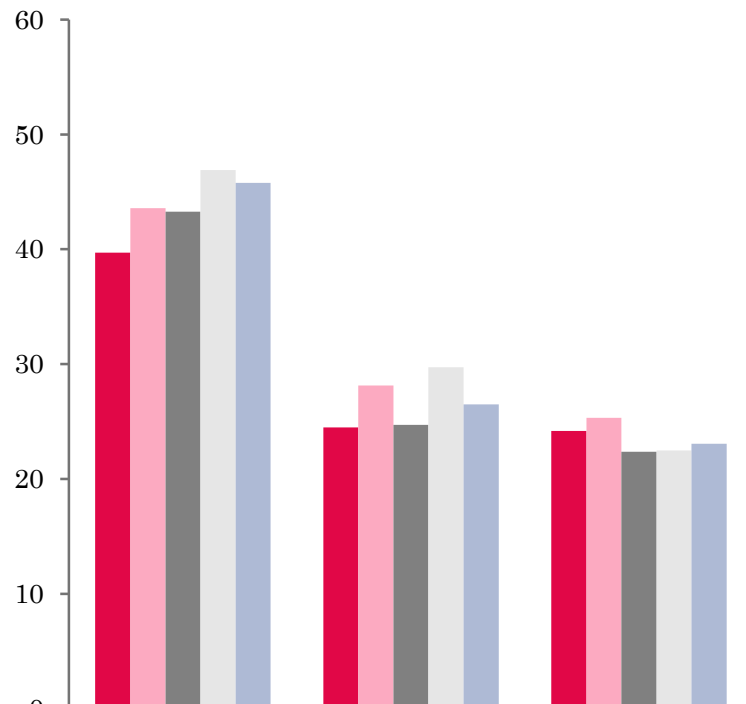
Table 2: UK/Non UK Occupancy Levels February 2012 – 2014 (see note 5a and 5b Slide 19)

	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	31	29	27	4	5	2	8	9	5	11	15	8	1582	1483	1912
Northern Ireland	18	20	13	11	11	15	31	28	35	39	35	53	176	142	201
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	297	286	285
Wales	25	29	26	1	1	1	**	**	**	4	4	5	121	121	114
UK	30	29	27	4	5	2	9	10	6	11	15	9	2176	2032	2512

** FIGURES NOT AVAILABLE

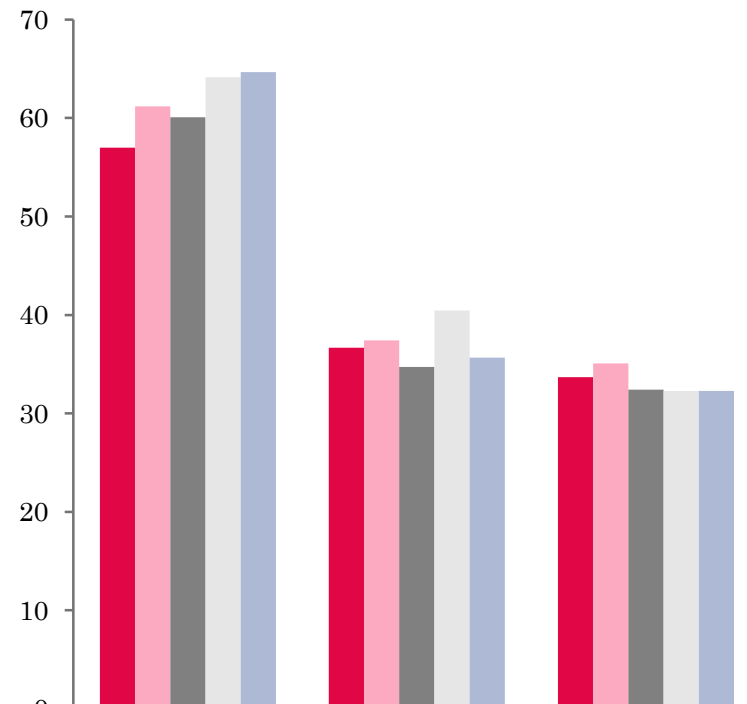


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION FEBRUARY 2010-2014



	Hotels	Guesthouses	B&Bs
2010	40	25	24
2011	44	28	25
2012	43	25	22
2013	47	30	22
2014	46	26	23

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



	Hotels	Guesthouses	B&Bs
2010	57	37	34
2011	61	37	35
2012	60	35	32
2013	64	40	32
2014	65	36	32



- Both room and bedspace occupancy levels remained fairly static across hotel and B&B establishment types in February 2014. Guesthouse accommodation witnessed a downturn in both measures of occupancy (-4%) (Table 3).
- Bedspace occupancy in four out of the six size bandings remained on a par with the previous year's results (static or +1%). The 51-100 size band witnessed the largest downturn of 7 percentage points, with the 26-50 size band also decreasing by 3 percentage points. As with bedspace occupancy, room occupancy in the 51-100 size band witnessed a downturn of 7 percentage points. The 100+ size band increased by 2 percentage point and the remaining size bands remained static compared with the previous year's results.
- Both room and bed occupancy levels remained fairly static across three out of the four location types when compared with the same period in 2013. City/large town location fared better than other location types, with a 3 percentage point increase in bedroom occupancy (Table 8).
- Across the tariff bands, bedspace occupancy either increased slightly or remained on a par with February 2013, with the exception of the £20.00-£29.00 tariff band, where bed occupancy levels decreased by 3 percentage points. Room occupancy differed slightly with the £30.00-£39.00 tariff band witnessing an upturn of 3 percentage points, the £50.00-£59 an increase of 2 percentage points and the £40.00 - £49.00 tariff band witnessing a downturn of 2 percentage points. All other room occupancy tariff bands remained on a par with February 2013 figures.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	45	48	47	62	65	66	1002	984	1464
Northern Ireland	36	37	36	56	53	60	61	47	84
Scotland	39	45	43	55	64	61	219	211	217
Wales	34	39	39	50	56	56	69	65	67
UK	43	47	46	60	64	65	1351	1307	1832
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	27	31	29	38	42	39	227	198	176
Northern Ireland	17	27	19	24	38	27	20	18	27
Scotland	20	28	19	28	39	24	36	35	30
Wales	11	16	12	15	22	20	21	24	18
UK	25	30	26	35	40	36	304	275	251
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	24	24	25	35	35	35	353	314	272
Northern Ireland	8	11	5	13	18	11	95	77	90
Scotland	19	17	19	28	23	26	42	40	38
Wales	16	19	12	19	22	17	31	32	29
UK	22	22	23	32	32	32	521	463	429



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: February 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	44	45	46	40	42	42	53	54	56	61	62	64
Northern Ireland	36	36	38	25	28	25	50	46	58	46	46	50
Scotland	39	50	41	31	40	33	47	61	50	49	65	52
Wales	32	37	37	26	30	28	39	45	46	40	46	46
UK	42	45	45	37	41	40	51	54	55	58	61	61



Table 5: Non-UK Percentages: February 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	7	7	4	9	11	6	10	15	7	12	18	9
Northern Ireland	35	24	29	37	33	35	43	30	41	47	40	45
Scotland	0	0	0	0	0	0	0	0	0	0	0	0
Wales	0	0	0	0	0	0	3	4	2	5	5	3
UK	8	7	5	10	12	7	10	15	8	12	18	10

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Table 6: Occupancy Levels by Size: February 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	19	18	20	180	24	23	23	246	30	32	33	106
Northern Ireland	6	14	6	65	13	18	8	43	23	25	21	33
Scotland	18	13	14	35	20	23	26	48	33	38	38	47
Wales	10	12	9	26	18	21	16	26	28	38	22	20
UK	18	17	18	306	23	23	23	363	30	33	33	206

Table6: Occupancy Levels by Size: February 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	39	46	44	64	45	51	43	39	48	50	52	1277
Northern Ireland	25	24	27	22	34	35	38	25	44	44	40	13
Scotland	37	42	39	53	44	47	48	47	46	46	49	55
Wales	37	46	34	20	39	41	35	10	38	41	33	7
UK	38	45	42	159	44	50	43	121	47	49	50	1352



Table 7: Occupancy Levels by Size: February 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	27	25	27	180	34	33	33	246	43	46	47	106
Northern Ireland	11	22	10	65	18	26	12	43	32	36	35	33
Scotland	26	20	20	35	31	32	33	48	43	48	52	47
Wales	11	17	10	26	24	26	22	26	43	40	32	20
UK	25	24	25	375	33	32	32	363	43	46	47	206

Table 7: Occupancy Levels by Size: February 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	52	60	61	64	64	65	57	39	68	71	73	1277
Northern Ireland	48	40	50	22	56	52	55	25	62	60	69	13
Scotland	50	57	56	53	62	66	68	47	65	66	70	55
Wales	53	58	49	20	58	59	50	10	56	67	59	7
UK	52	59	59	159	63	65	58	121	67	70	72	1352



Table 8: Occupancy Levels by Location Types: February 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	31	32	29	184	47	51	53	1004	37	40	40	394	37	35	35	330
Northern Ireland	31	29	21	47	34	37	35	69	14	23	22	59	10	15	10	26
Scotland	29	37	32	29	41	47	45	122	26	36	26	64	28	43	32	70
Wales	31	42	36	30	37	45	41	12	29	26	31	13	22	23	26	59
UK	31	33	30	290	45	50	51	1207	34	38	37	530	34	35	34	485

Table 8: Occupancy Levels by Location Types: February 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	43	44	44	184	65	68	72	1004	55	58	58	394	47	47	48	330
Northern Ireland	35	39	29	47	55	54	60	69	26	32	30	59	14	24	26	26
Scotland	41	51	43	29	60	67	65	122	40	54	41	64	37	53	40	70
Wales	41	48	44	30	55	70	72	12	44	39	41	13	31	31	37	59
UK	42	45	44	290	63	68	71	1207	51	56	54	530	44	47	46	485

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	**	**	**	**	11	12	11	29	20	16	19	106
Northern Ireland	**	**	**	**	5	12	5	20	11	11	6	51
Scotland	**	**	**	**	17	24	18	13	23	28	18	44
Wales	**	**	**	**	8	11	3	4	17	20	15	26
UK	**	**	**	**	11	14	11	66	20	18	18	227

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	26	26	27	129	32	31	33	83	44	47	47	1529
Northern Ireland	26	20	24	34	29	24	38	28	36	39	33	68
Scotland	24	37	27	32	38	43	44	31	41	46	45	165
Wales	23	17	24	17	44	43	37	17	32	42	40	50
UK	26	27	27	212	34	33	35	159	43	46	46	1812

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	**	**	**	**	22	22	22	29	29	24	31	106
Northern Ireland	**	**	**	**	9	16	8	20	17	20	9	51
Scotland	**	**	**	**	26	33	27	13	38	45	28	44
Wales	**	**	**	**	10	14	5	4	20	25	23	26
UK	**	**	**	**	21	23	22	66	29	27	30	227

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	34	35	35	129	47	42	44	83	61	65	65	1529
Northern Ireland	38	28	38	34	35	33	61	28	56	55	56	68
Scotland	35	56	41	32	50	60	61	31	56	65	62	165
Wales	32	32	37	17	57	53	43	17	48	57	59	50
UK	34	38	36	212	48	45	47	159	59	64	64	1812

** 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)

