



UNITED KINGDOM OCCUPANCY SURVEY

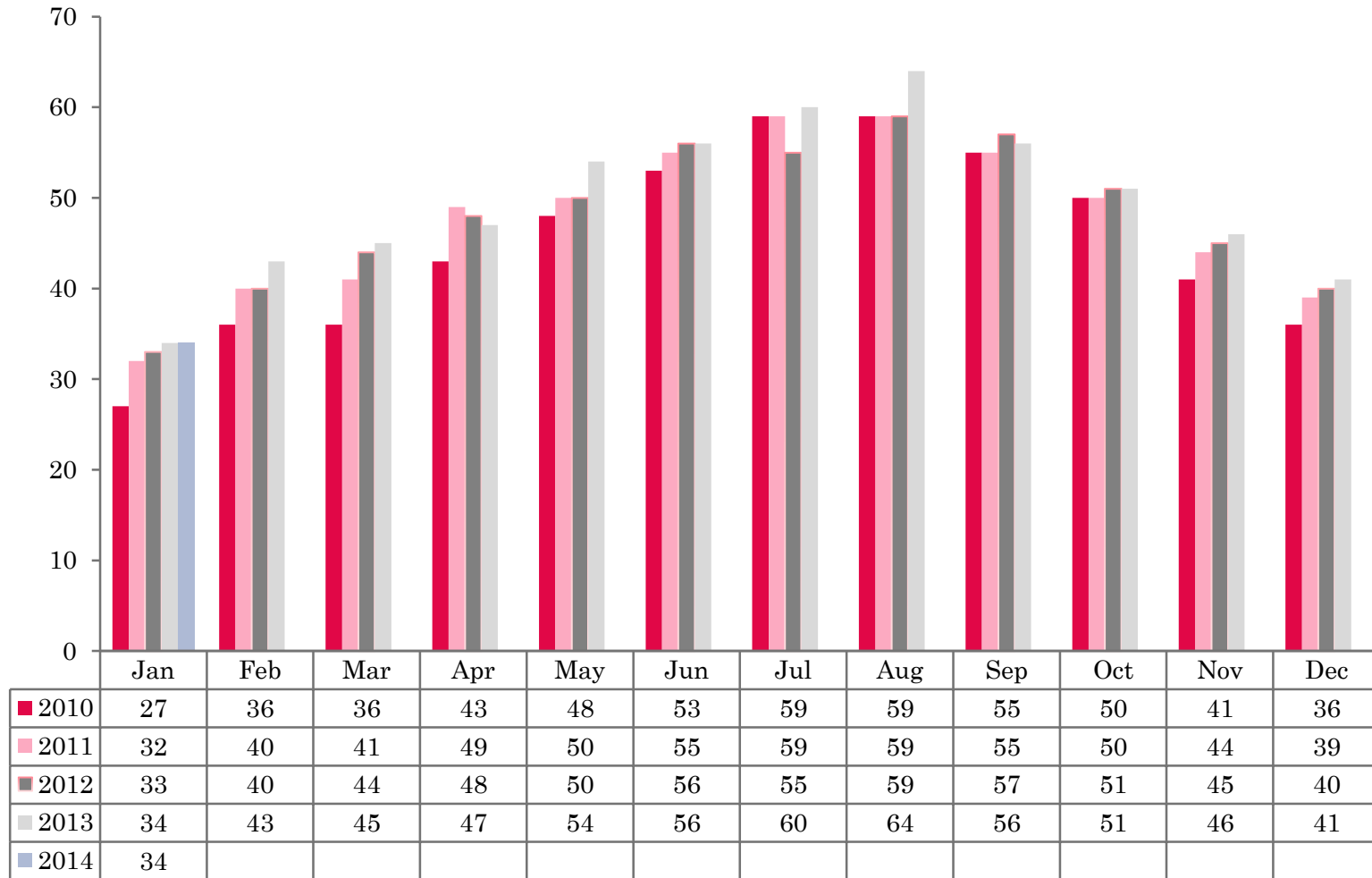
Serviced Accommodation Summary Report
January 2014

UK OCCUPANCY SURVEY

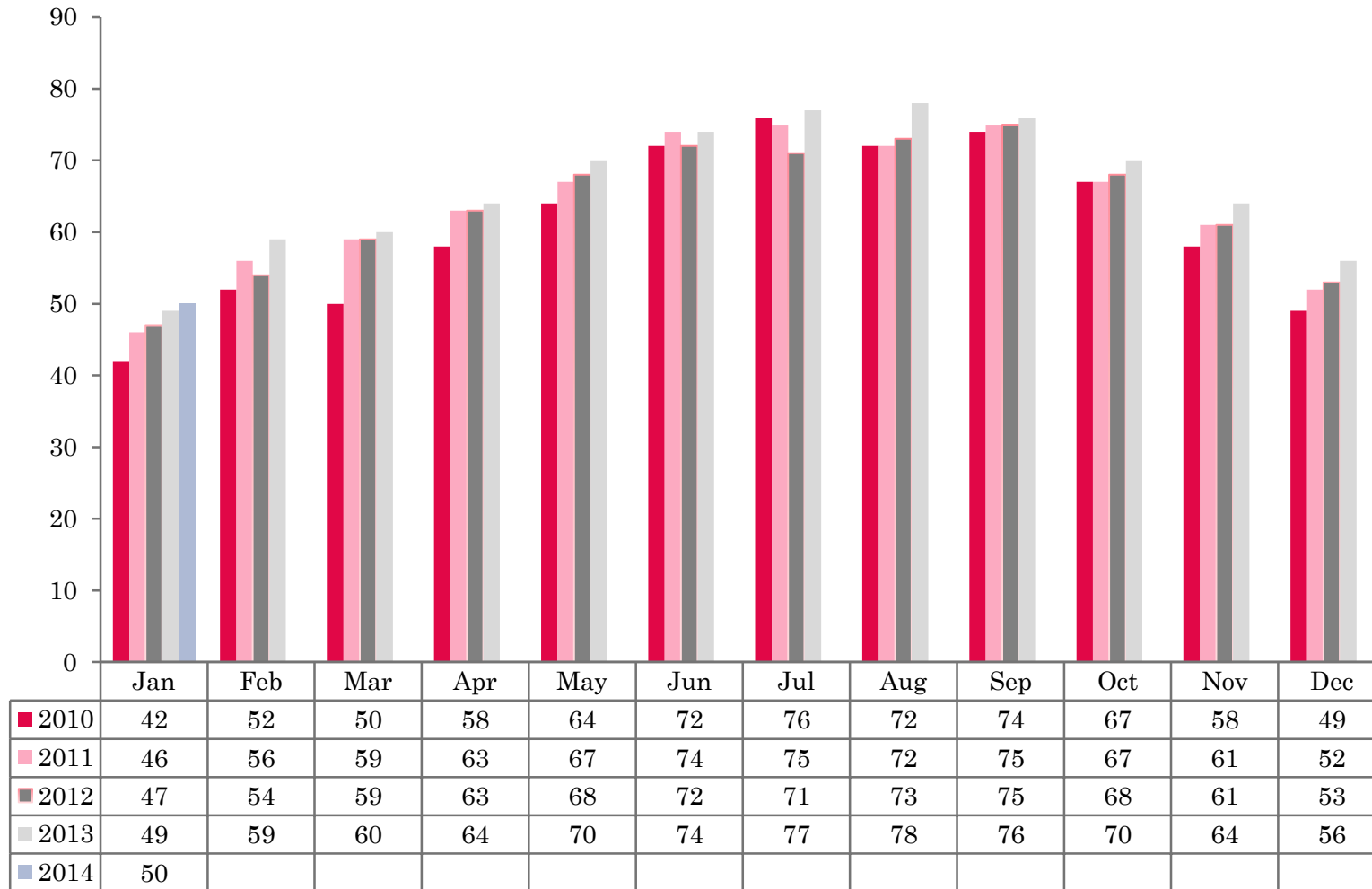
- This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2010 - 2014



UK BEDROOM OCCUPANCY 2010 - 2014

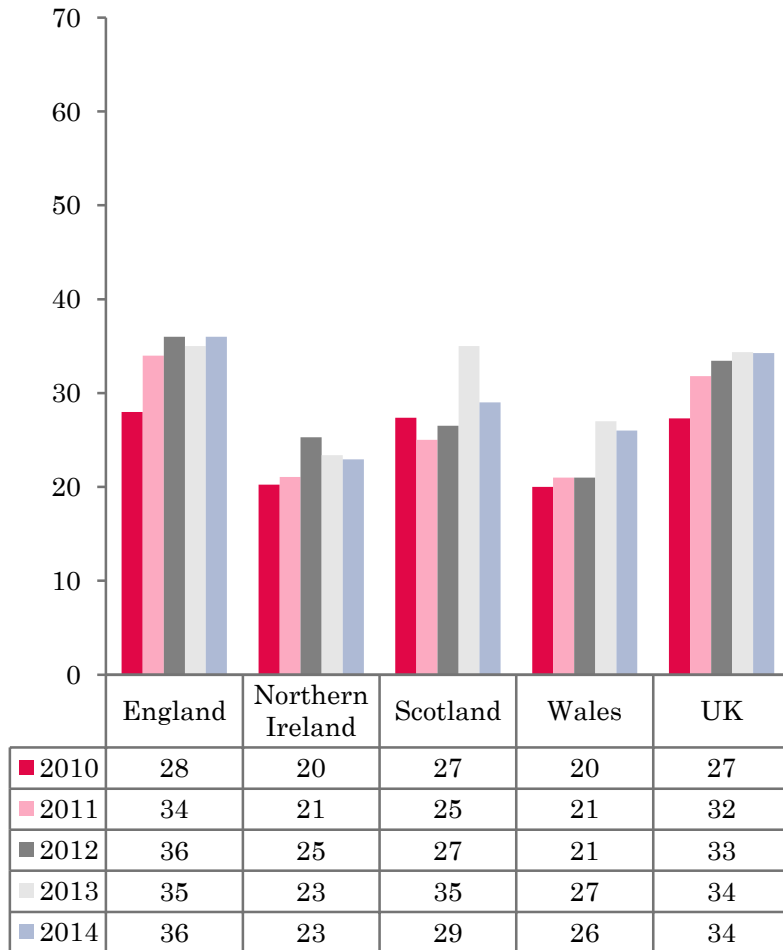


❖ 2,467 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

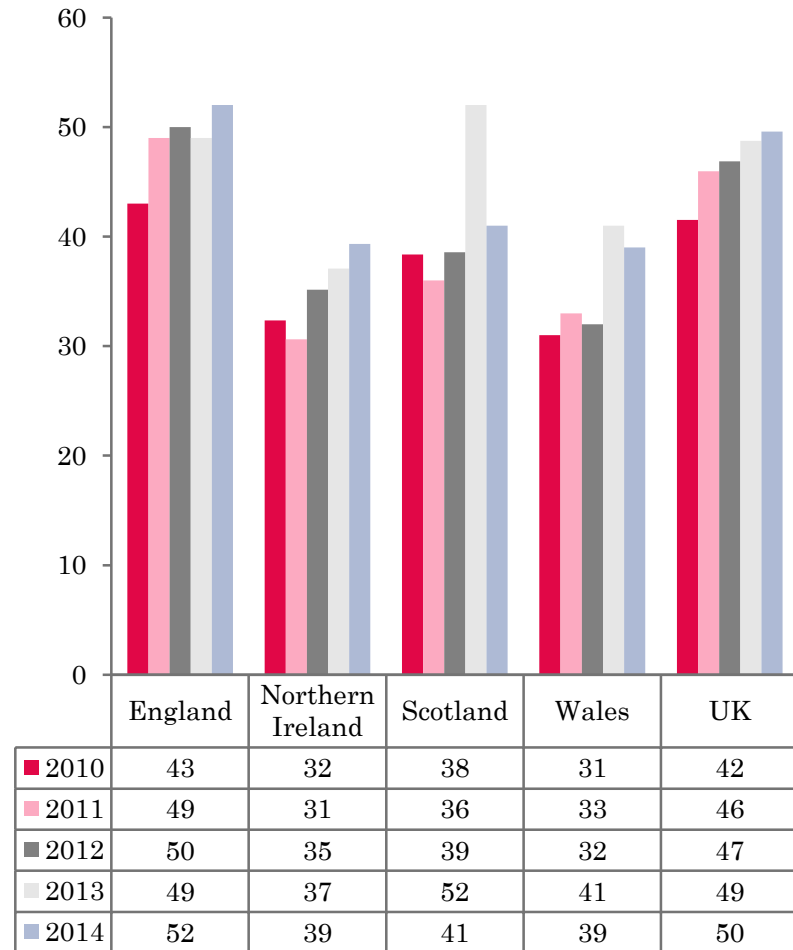
❖ UK bedspace occupancy (34%) remained flat when compared to January 2013. Room occupancy (50%) had risen slightly by 1 percentage point reaching its highest level in January over the last 5 years.



NATIONAL BEDSPACE OCCUPANCY JANUARY 2010-2014



NATIONAL ROOM OCCUPANCY JANUARY 2010-2014



- Bedspace occupancy varied from 36% in England to 23% in Northern Ireland during January 2014.
- In the UK during January 2014, both room and bedspace occupancy remained constant with January 2013, witnessing no significant improvements in either measures of occupancy.
- Both room and bedspace occupancy in Wales fell slightly in January 2014 compared to the same month the previous year. Room occupancy was down 2 percentage points when compared to January 2013.
- England fared the best in occupancy levels in January 2014 with bed occupancy remaining flat (+1%), and room up by 3 percentage points.
- Scotland witnessed a significant downturn in both room and bedspace occupancy in January 2014. Bedspace occupancy was down 6 pp on January 2013 with room occupancy falling by 11 pp when compared to the same period the previous year. Northern Ireland bedspace remained flat, with room occupancy up 2 pp on last years results.
- Across the UK as a whole, bedspace occupancy by non-UK residents had fallen when compared with January 2013. England mirrored the UK (-3 pp), whilst Northern Ireland witnessed the biggest increase of 3 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: January 2012 - 2014

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	36	35	36	50	49	52	1541	1464	1894
Northern Ireland	25	23	23	35	37	39	186	170	195
Scotland	27	35	29	39	52	41	296	275	269
Wales	21	27	26	32	41	39	128	107	109
UK	33	34	34	47	49	50	2151	2016	2467

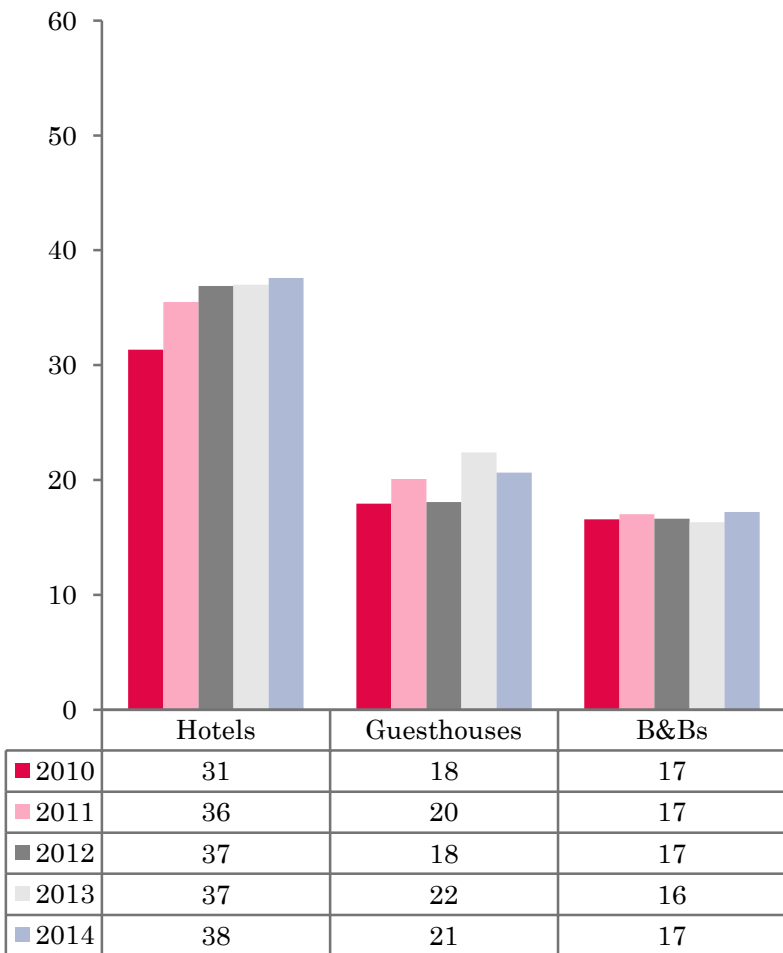
Table 2: UK/Non UK Occupancy Levels January 2012 – 2014 (see note 5a and 5b Slide 19)

	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	24	20	22	5	5	2	11	12	6	17	21	9	1541	1464	1894
Northern Ireland	15	15	12	11	8	11	28	29	43	42	36	48	186	170	195
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	296	275	269
Wales	19	24	20	1	1	1	**	**	**	6	4	5	128	107	109
UK	23	20	22	5	5	2	11	12	7	17	20	10	2151	2016	2467

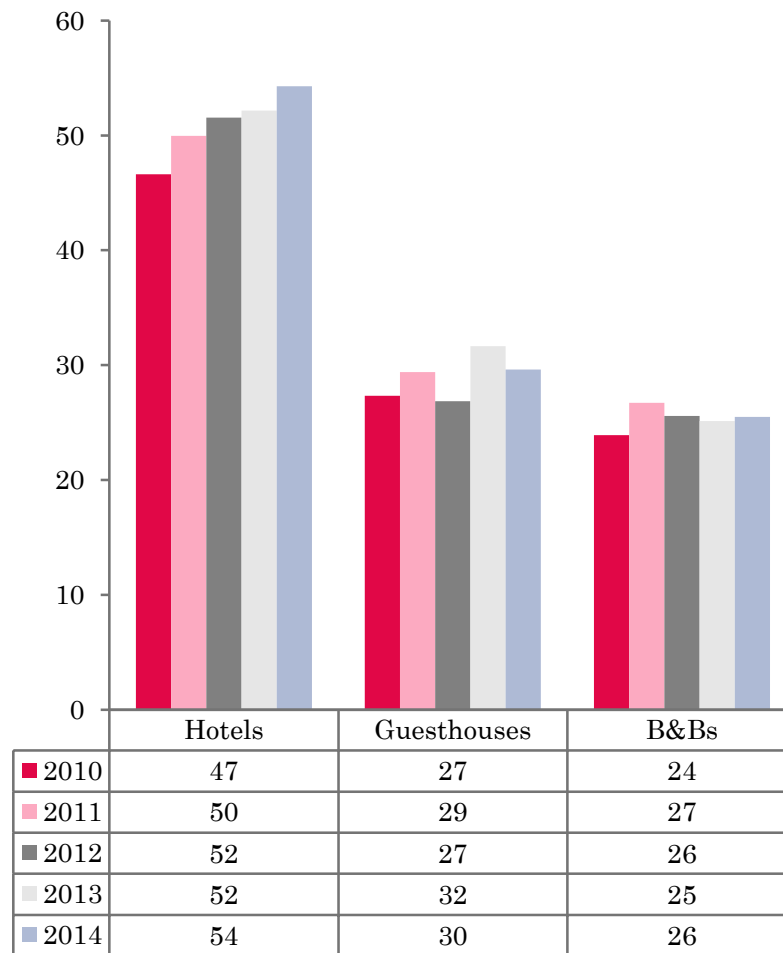
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UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JANUARY 2010-2014



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



- Both room and bedspace occupancy levels remained fairly static across all three establishment types in January 2014. Both Hotels and B&B remained static (+1%) in bedspace occupancy with room occupancy remaining flat for B&B, and increasing by 2 pp for the Hotel sector. Guesthouse accommodation witnessed a slight downturn in both measures of occupancy (Table 3).
- Bedspace occupancy in five out of the six size bandings were higher than in January 2013. The biggest increase was found in the 11-25 and >100 size bandings where bedspace occupancy levels increased by 2 percentage points each, when compared to the previous year. The remaining size bandings remained static (+1%) with the previous year's results, with the 51-100 size banding recording a 3 percentage point loss on 2013 data. As with bedspace occupancy, room occupancy was also higher in five out of the six size bandings when compared to the previous year. The >100 category saw the biggest increase, up 4 percentage points on January 2013.
- 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 witnessed in bedspace occupancy and 5 percentage points in room occupancy. (Table 8).
- Across the tariff bands, bedspace occupancy either increased or remained on a par with January 2013 with the exception of the £50.00- £59.00 tariff band, where bed occupancy levels increased by 3 percentage points. Room occupancy differed slightly with the £20.00-£29.00 tariff band witnessing a downturn of 3 percentage points, and all other room occupancy tariff bands remaining on a par with January 2013 figures.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	39	38	39	54	53	56	984	977	1466
Northern Ireland	31	28	29	43	44	50	64	75	74
Scotland	32	36	33	45	52	48	217	204	207
Wales	26	28	30	39	43	46	74	62	63
UK	37	37	38	52	52	54	1339	1318	1810
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	20	24	22	30	33	32	215	185	168
Northern Ireland	15	20	14	21	24	23	22	6	30
Scotland	12	19	17	17	32	21	39	33	29
Wales	10	7	12	14	13	18	25	23	17
UK	18	22	21	27	32	30	301	247	244
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
England	18	18	19	28	28	28	342	302	260
Northern Ireland	6	10	4	9	15	9	100	89	91
Scotland	14	11	12	21	16	19	40	38	33
Wales	9	7	9	12	9	11	29	22	29
UK	17	16	17	26	25	26	511	451	413



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: January 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	36	33	36	35	35	37	44	42	44	54	54	57
Northern Ireland	31	27	27	19	19	22	37	37	36	35	35	38
Scotland	29	38	31	26	34	28	36	47	38	42	55	45
Wales	23	27	23	19	26	28	29	34	39	33	44	36
UK	34	33	34	32	34	35	42	42	43	50	53	54



Table 5: Non-UK Percentages: January 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	12	4	12	12	7	16	22	8	17	21	10
Northern Ireland	18	26	41	26	34	47	45	34	48	45	41	57
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	4	3	3	7	5	1
UK	10	12	5	12	13	8	16	21	9	17	21	11

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Table 6: Occupancy Levels by Size: January 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	13	13	15	173	18	17	18	235	23	23	27	108
Northern Ireland	4	17	4	67	8	18	8	44	20	17	12	34
Scotland	11	12	11	32	16	16	21	44	27	29	26	43
Wales	7	7	9	26	13	12	16	26	22	23	22	20
UK	12	13	14	298	17	17	18	349	23	24	26	205

Table6: Occupancy Levels by Size: January 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	33	34	35	62	40	37	34	38	42	41	43	1278
Northern Ireland	19	30	21	19	25	31	30	21	40	33	33	10
Scotland	27	32	29	53	35	38	38	45	37	36	39	52
Wales	30	29	34	20	23	29	35	10	29	29	33	7
UK	32	33	34	154	38	37	34	114	40	40	42	1347



Table 7: Occupancy Levels by Size: January 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	20	20	21	173	27	26	27	235	35	37	41	108
Northern Ireland	9	21	9	67	10	28	13	44	30	28	22	34
Scotland	16	16	17	32	21	27	28	44	39	40	37	43
Wales	10	10	10	26	18	16	22	26	34	35	32	20
UK	19	19	20	375	25	26	27	349	35	37	40	205

Table 7: Occupancy Levels by Size: January 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	45	49	50	62	55	51	51	38	61	59	62	1278
Northern Ireland	35	44	38	19	43	51	42	21	47	41	59	10
Scotland	40	46	43	53	50	54	55	45	53	54	57	52
Wales	48	43	49	20	38	43	50	10	43	47	59	7
UK	44	48	49	154	53	51	51	114	58	57	61	1347



Table 8: Occupancy Levels by Location Types: January 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	25	22	24	171	44	42	45	1005	30	30	32	387	27	25	27	331
Northern Ireland	16	19	16	47	32	28	29	61	16	17	17	58	10	13	9	29
Scotland	25	28	20	28	34	36	38	115	22	37	20	58	17	30	23	68
Wales	22	30	30	28	27	31	35	13	20	23	17	13	17	20	20	55
UK	25	23	24	274	41	40	43	1194	28	30	29	516	25	25	26	483

Table 8: Occupancy Levels by Location Types: January 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	36	36	40	171	58	57	62	1005	47	46	48	387	38	38	40	331
Northern Ireland	21	26	23	47	44	46	49	61	22	26	28	58	16	19	17	29
Scotland	34	44	28	28	51	54	56	115	32	47	33	58	24	43	31	68
Wales	30	39	38	28	43	49	60	13	35	40	30	13	25	31	28	55
UK	35	37	38	274	56	56	61	1194	44	45	45	516	35	38	38	483

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 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	**	**	**	**	8	10	9	25	14	13	14	101
Northern Ireland	**	**	**	**	6	6	6	23	5	14	3	45
Scotland	**	**	**	**	13	21	15	14	17	26	14	41
Wales	**	**	**	**	7	7	7	7	12	11	12	24
UK	**	**	**	**	9	11	10	69	14	15	14	211

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 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	19	18	20	129	25	25	28	78	38	38	39	1527
Northern Ireland	19	13	12	41	17	18	30	29	33	29	29	57
Scotland	21	27	21	32	28	33	35	32	33	37	35	150
Wales	18	16	16	15	32	31	28	18	25	29	32	45
UK	19	19	20	217	26	26	29	157	36	37	38	1779

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 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	**	**	**	**	15	19	17	25	23	20	25	101
Northern Ireland	**	**	**	**	10	13	11	23	9	21	8	45
Scotland	**	**	**	**	16	29	19	14	27	42	25	41
Wales	**	**	**	**	12	11	11	7	18	16	16	24
UK	**	**	**	**	15	20	17	69	23	23	24	211

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 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	26	26	27	129	36	37	36	78	54	53	56	1527
Northern Ireland	29	21	24	41	23	26	48	29	44	46	48	57
Scotland	31	45	33	32	39	47	50	32	48	54	51	150
Wales	27	24	28	15	41	44	37	18	38	44	50	45
UK	27	28	28	217	36	38	38	157	52	53	55	1779

** 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)

