

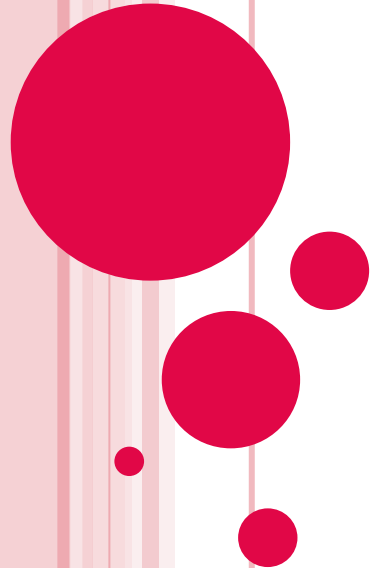


UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation
Annual Report 2014

May 2015

the **research** solution



INTRODUCTION

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2014 which is jointly 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.

This report has been compiled by Christine King at The Research Solution.



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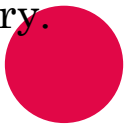


SUMMARY: BEDROOM OCCUPANCY

- The UK average annual bedroom occupancy for 2014 increased by 2 percentage points compared to 2013 data. England, Scotland and Northern Ireland remained static, with Wales witnessing the only movement, with bedroom occupancy levels up by 2 percentage points.
- The monthly UK bedroom occupancy levels saw increases in 4 out of the 12 months during 2014 with the remaining months flat with 2013 levels. April, September, October and December all rose by 2 percentage points during 2014, with August recording the highest levels of bedroom occupancy throughout the year (79%).
- Bedroom Occupancy levels in England increased by 3 percentage points in January and by 2 percentage points in April, August, September, October and December respectively. All other months during 2014 remained on a par with levels witnessed in 2013.
- In contrast to the early months of 2013, Scotland saw a significant decrease in bedroom occupancy levels during January of 11 percentage points and 12 percentage points during February. The end of the 2014 saw both November and December increasing bedroom occupancy levels with a rise of 4 and 5 percentage points respectively. The remaining months remained flat against levels achieved in the previous year.
- Wales fared well during 2014 with occupancy levels increasing during 9 out of the 12 months (February – October). April, September and October all recorded increases of 6 percentage points each. January, November and December were the only months to record a fall in bedroom occupancy during 2014..
- Northern Ireland witnessed fluctuating occupancy levels during 2014 with only January, February and April seeing increases in bedroom occupancy levels. Decreases were witnessed in March, June and October with all other months remaining flat when compared with 2013.

SUMMARY: BEDSPACE OCCUPANCY

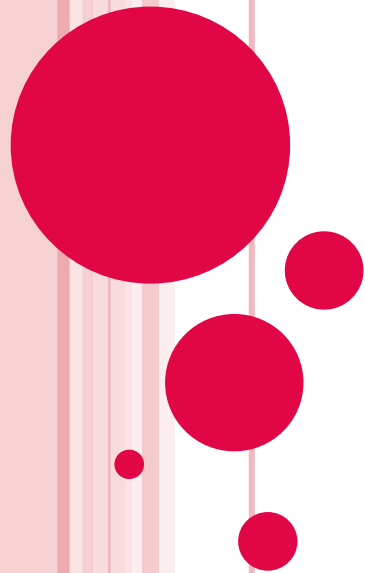
- ❖ UK bedspace occupancy levels remained flat against 2013 across most of the year. April, September and December were the exception where occupancy levels increased by 4 and 2 percentage points respectively.
- ❖ England bedspace occupancy levels were similar to the UK with an increase in April of 4 percentage points and December of 2 percentage points, All other months remained static with 2013 levels, with the exception of June where a 2 percentage point decrease was found.
- ❖ In reverse of 2013, bedspace occupancy levels in Scotland decreased by 9 percentage points in February, and 6 percentage points during January. April recorded the largest rise in bedspace occupancy, up 3 percentage points on 2013 levels. During the latter part of 2014, November and December rose by 2 percentage points, whilst all other months remained static with 2013.
- ❖ Wales bedspace occupancy saw increases of 6 percentage points in April 2014, 5 percentage points in October, 4 percentage points in June, August and September respectively and 3 percentage points in May. The remaining months were on a par with levels witnessed during 2013.
- ❖ Northern Ireland bedspace occupancy levels increased by 4 percentage points during September and November 2014. Bedspace occupancy levels decreased by 7 percentage points in March, 6 percentage points in July and by 2 percentage points in February. All other months remained flat when compared with 2013.



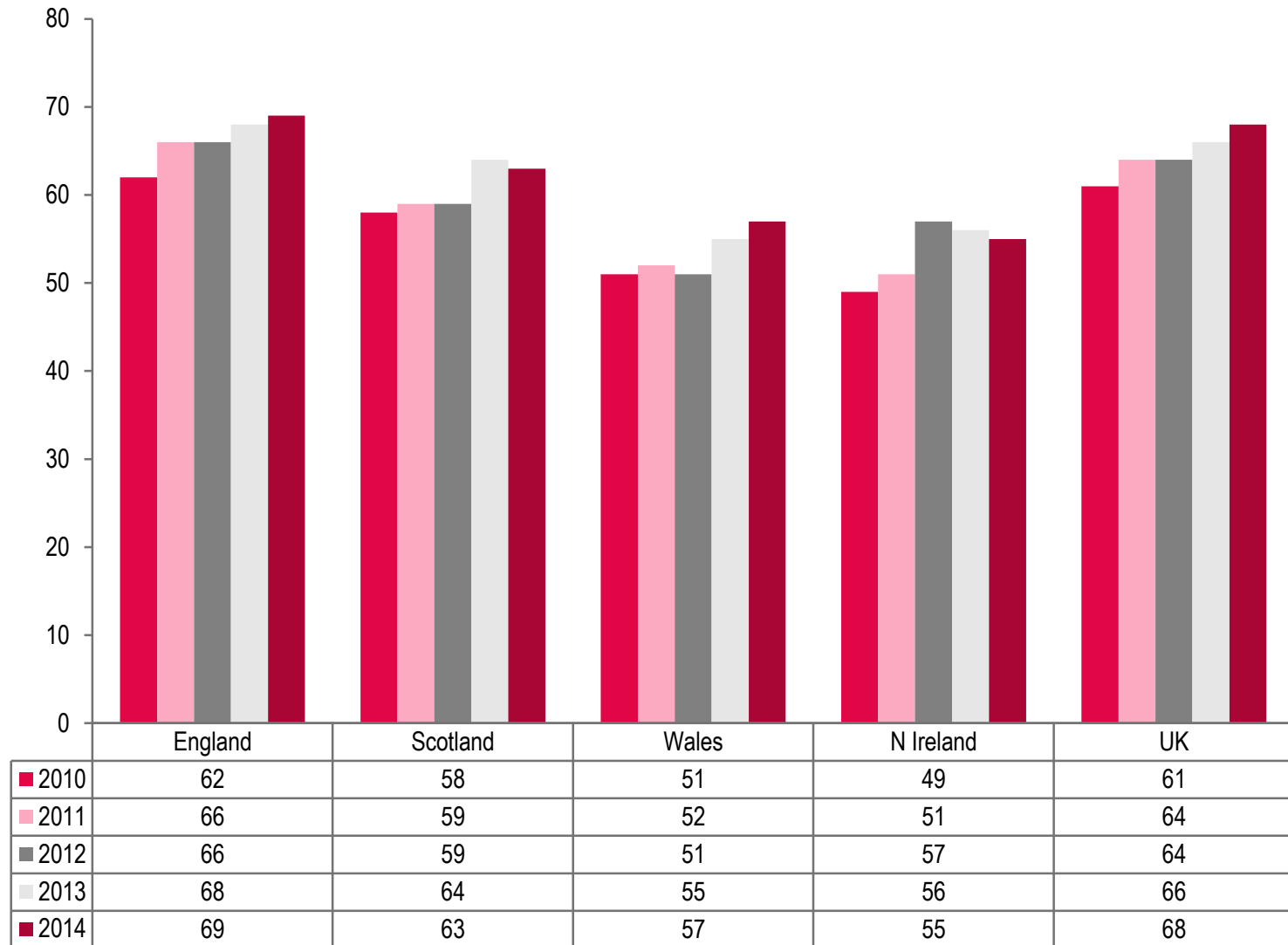
SUMMARY: ROOM AND BEDSPACE OCCUPANCY IN DETAIL

- Across the UK as a whole, weekday bedroom and bedspace occupancy levels remained flat (+1 percentage point) when compared to 2013. Wales and Northern Ireland remained on a par with 2013 in weekday bedroom occupancy and increased by 2 percentage points each in bedspace occupancy. England mirrored that of the UK with little change in both bedroom and bedspace occupancy levels. Scotland fared less with both measures of occupancy falling during 2014, down by 6 percentage points in weekday bedroom occupancy and by 4 percentage points in bedspace occupancy during 2014.
- The UK weekend bedroom occupancy levels rose by 2 percentage points during 2014, whilst bedspace occupancy remained on a par with the previous year. England, Wales and Northern Ireland saw increases in weekend bedroom occupancy (up 5 percentage points respectively). As with weekday occupancy, Scotland witnessed a fall in both weekend bedroom and bedspace occupancy during 2014, down by 5 percentage points each.
- Across the UK, bedroom occupancy by type of establishment saw hotels rise by 2 percentage points. Both guesthouses and B&B's saw little change from the levels achieved during 2013. Bedroom occupancy levels in England rose in both the hotel and B&B sector (2 percentage points respectively). Scotland witnessed a fall of 2 percentage points in the guesthouse sector with hotels and B&B's remaining on a par with 2013. Northern Ireland fared less well with both guesthouses and B&B's falling by 6 and 2 percentage points during 2014. Wales saw a rise in both the hotel and guesthouse sector but a fall of 4 percentage points in guesthouses.
- Bedspace occupancy in B&B's in England rose by 3 percentage points whilst B&B's in Scotland and Northern Ireland remained on a par with 2013. Wales saw B&B bedspace occupancy fall by 3 percentage points with a rise in hotel bedspace occupancy during 2014 (up 2 percentage points). Generally, the guesthouse sector did not perform well during 2014, with Northern Ireland and Scotland falling by 6 and 2 percentage points respectively. Both England and Wales remained on a par with 2013.
- There had been little change across the UK as a whole, with both bedroom and bedspace occupancy levels by location remaining fairly flat when compared with 2013. Only City/Large Town locations saw a rise of 2 percentage points during 2014, with all other locations remaining flat during the year.

BEDROOM OCCUPANCY: UK AND NATIONAL



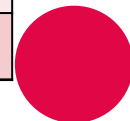
UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY 2010-2014



UK AND NATIONAL: MONTHLY BEDROOM OCCUPANCY 2010-2014

Table 1: UK and National: Bedroom Occupancy 2010- 2014

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14
January	43	49	50	49	52	38	36	39	52	41	31	33	32	41	39	32	31	35	37	39	42	46	47	49	50
February	53	59	57	60	61	50	46	48	63	51	43	45	40	46	48	42	44	45	45	48	52	56	54	59	59
March	50	62	62	63	64	50	50	50	53	53	45	47	50	48	50	46	44	48	48	45	50	59	59	60	61
April	59	65	65	66	68	55	58	57	58	60	53	54	50	52	58	40	48	60	51	55	58	63	63	64	66
May	65	68	69	71	72	66	67	67	70	70	57	57	55	61	64	53	55	62	61	62	64	67	68	70	71
June	73	75	73	75	76	72	74	73	75	75	63	63	60	60	65	58	65	71	67	65	72	74	72	74	75
July	77	77	72	78	79	74	73	72	77	78	64	64	60	66	69	61	60	70	68	64	76	75	71	77	78
August	72	72	73	77	79	78	79	77	83	82	65	65	65	71	76	63	67	74	74	73	72	72	73	78	79
September	75	76	77	77	79	72	74	73	76	78	62	62	65	63	69	60	60	67	66	64	74	75	75	76	78
October	69	69	71	72	74	62	60	62	65	65	55	53	52	55	61	50	52	59	59	55	67	67	68	70	72
November	61	64	64	67	68	51	52	51	52	56	45	47	44	50	45	43	46	50	52	52	58	61	61	64	65
December	52	55	56	59	61	36	41	41	43	48	34	36	40	43	39	35	38	43	42	41	49	52	53	56	58



UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY AVERAGES 2010-2014

Table 1a: UK and National: Bedroom Occupancy Averages 2010 - 2014

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14
April–Oct Average	70	72	71	74	75	68	69	69	72	73	60	60	58	61	66	55	58	66	64	63	69	70	70	73	74
July–Sept Average	75	75	74	77	79	75	75	74	79	79	64	64	63	67	71	61	63	70	69	67	74	74	73	77	78
Annual Average	62	66	66	68	69	58	59	59	64	63	51	52	51	55	57	49	51	57	56	55	61	64	64	66	68



UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS 2010 - 2014

Table 2: UK and National: Bedroom Occupancy Trends 2010- 2014

	England			Scotland			Wales			Northern Ireland			UK		
	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14
January	47	49	50	38	42	44	32	35	37	33	34	37	45	47	48
February	56	59	59	48	52	54	43	44	45	44	45	46	54	56	57
March	58	62	63	50	51	52	47	48	49	46	47	47	56	59	60
April	63	65	66	57	58	58	52	52	53	49	53	56	61	63	64
May	67	69	71	67	68	69	56	58	60	57	59	62	66	68	70
June	74	74	75	73	74	74	62	61	62	65	68	68	73	73	74
July	75	76	76	73	74	76	63	63	65	64	66	67	74	74	75
August	72	74	76	78	80	81	65	67	71	68	72	74	72	74	77
September	76	77	78	73	74	76	63	63	66	62	64	66	75	75	76
October	70	71	72	61	62	64	53	53	56	54	57	58	67	68	70
November	63	65	66	51	52	53	45	47	46	46	49	51	60	62	63
December	54	57	59	39	42	44	37	40	41	39	41	42	51	54	55



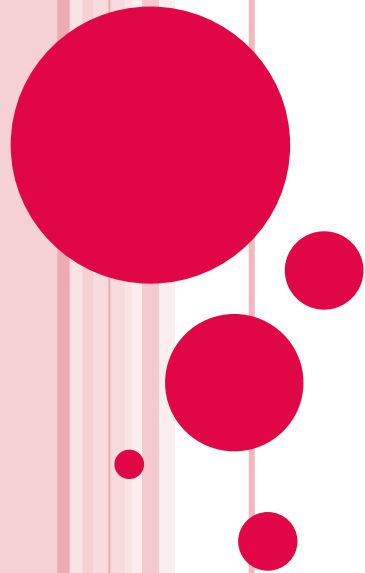
UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS - AVERAGES 2010-2014

Table 2a: UK and National: Bedroom Occupancy Trends 2010 - 2014

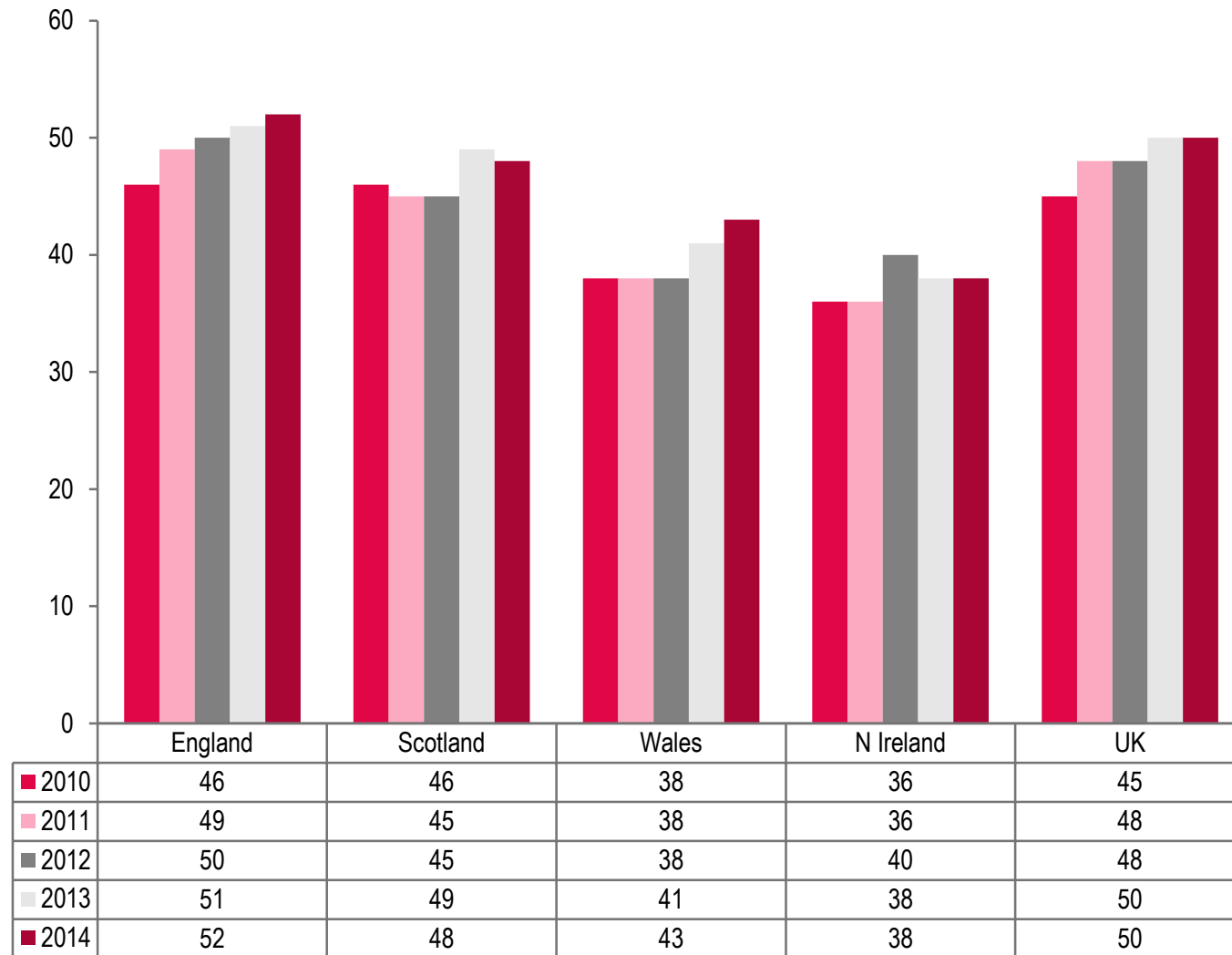
	England			Scotland			Wales			Northern Ireland			UK		
	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14
April–Oct Average	71	72	73	69	70	71	59	60	62	60	63	64	70	71	72
July–Sept Average	75	75	77	75	76	77	64	65	67	65	67	69	74	75	76
Annual Average	65	67	68	59	61	62	51	53	54	52	55	56	63	65	66



BEDSPACE OCCUPANCY: UK AND NATIONAL



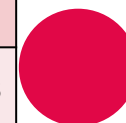
UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY 2010-2014



UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY 2010-2014

Table 3: UK and National: Bedspace Occupancy 2010 - 2014

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14
January	28	34	36	35	36	27	25	27	35	29	20	21	21	27	26	20	21	25	23	23	27	32	33	34	34
February	36	42	42	44	44	36	33	33	45	36	30	30	29	33	33	30	31	29	31	29	36	40	40	43	42
March	36	43	46	47	48	36	34	36	39	38	32	32	36	35	35	31	30	33	38	31	36	41	44	45	46
April	44	50	50	49	53	43	46	43	43	46	40	40	39	38	44	33	37	42	36	36	43	49	48	47	51
May	48	51	51	55	54	52	51	51	54	54	43	42	40	46	49	37	39	42	43	42	48	50	50	54	53
June	53	56	57	57	55	56	58	57	58	58	47	46	46	45	49	43	44	48	46	45	53	55	56	56	55
July	59	60	55	60	60	61	61	58	63	63	51	48	45	54	55	49	42	54	46	40	59	59	55	60	60
August	58	59	59	64	63	66	65	64	69	68	53	52	54	58	62	50	52	56	54	55	59	59	59	64	64
September	56	56	58	57	58	56	57	55	58	59	47	45	48	48	52	43	42	46	41	45	55	55	57	56	58
October	52	52	53	53	54	48	46	45	49	49	40	39	39	40	45	28	36	42	40	39	50	50	51	51	52
November	43	47	48	49	48	37	37	36	37	39	29	31	31	36	34	29	33	35	32	36	41	44	45	46	46
December	39	42	42	43	45	28	31	32	33	35	23	25	30	32	30	26	28	30	29	30	36	39	40	41	43



UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY TRENDS - AVERAGES 2010 - 2014

Table 3a: UK and National: Average Bedspace Occupancy 2010 - 2014

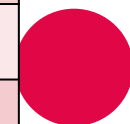
	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14	10	11	12	13	14
April–Oct Average	53	55	55	56	57	55	55	53	56	57	46	45	44	47	51	42	42	47	44	43	53	54	54	56	56
July–Sept Average	58	58	57	60	60	61	61	59	63	63	50	48	49	53	56	47	45	52	47	47	58	58	57	60	60
Annual Average	46	49	50	51	52	46	45	45	49	48	38	38	38	41	43	36	36	40	38	38	45	48	48	50	50



UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY TRENDS 2010-2014

Table 4: UK and National: Bedspace Occupancy Trends 2010 - 2014

	England			Scotland			Wales			Northern Ireland			UK		
	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14
January	33	35	50	26	26	44	21	21	37	22	22	37	31	33	48
February	40	42	59	34	33	54	30	29	45	30	30	46	39	40	57
March	42	45	63	35	35	52	33	35	49	31	31	47	40	43	60
April	48	50	66	44	44	58	40	39	53	37	37	56	47	48	64
May	50	51	71	51	51	69	42	41	60	39	39	62	49	50	70
June	55	57	75	57	57	74	46	46	62	45	45	68	55	56	74
July	58	57	76	60	59	76	48	46	65	48	48	67	58	56	75
August	59	59	76	65	64	81	53	53	71	53	53	74	59	59	77
September	57	57	78	56	56	76	47	47	66	44	44	66	56	56	76
October	52	53	72	46	45	64	39	39	56	35	35	58	50	51	70
November	46	48	66	37	36	53	30	31	46	32	32	51	43	45	63
December	41	42	59	30	32	44	26	28	41	28	28	42	38	40	55



UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY TRENDS - AVERAGES 2010 - 2014

Table 4: UK and National: Bedspace Occupancy Trends 2010 - 2014

	England			Scotland			Wales			Northern Ireland			UK		
	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14	10-12	11-13	12-14
April–Oct Average	54	55	56	54	55	55	45	45	47	44	44	45	54	55	55
July–Sept Average	58	58	59	60	61	62	49	50	53	48	48	49	58	58	59
Annual Average	48	50	51	45	46	47	38	39	41	37	38	39	47	49	49



UK AND NATIONAL ANNUAL WEEKDAY OCCUPANCY 2010 - 2014

Fig. 3: UK and National: Annual Weekday
Bedroom Occupancy 2010 – 2014

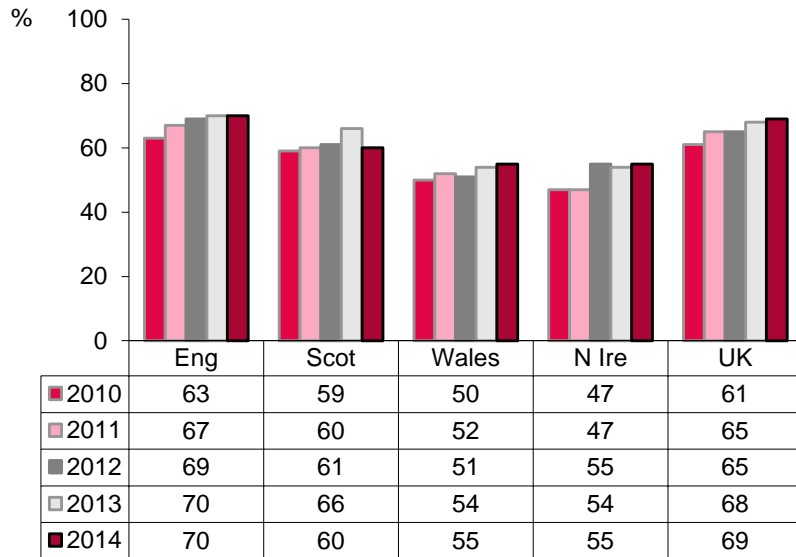
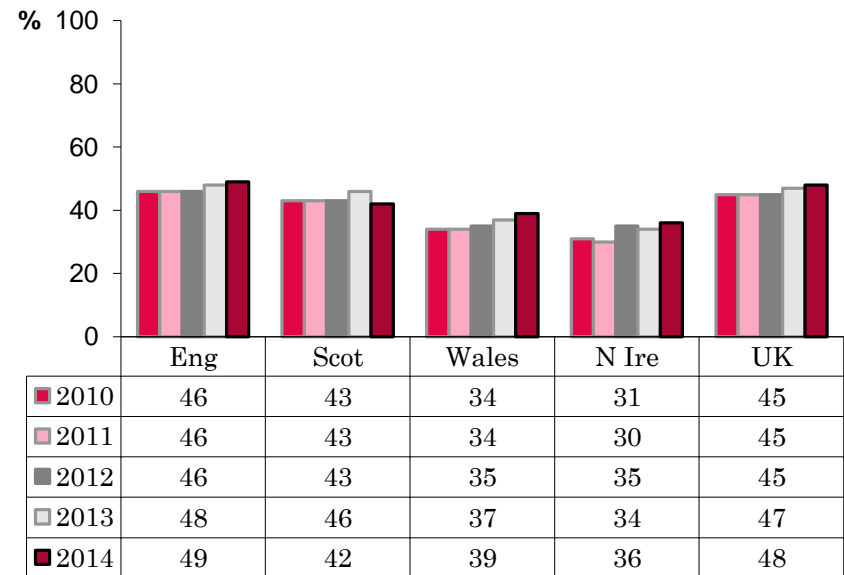
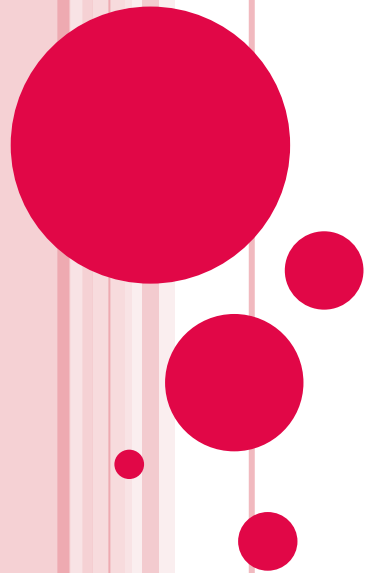


Fig. 4: UK and National: Annual Weekday
Bedspace Occupancy 2010 - 2014



OCCUPANCY IN DETAIL: UK AND NATIONAL



UK AND NATIONAL ANNUAL WEEKEND OCCUPANCY 2010 - 2014

Fig. 5 UK and National: Annual Weekend Bedroom Occupancy 2010 – 2014

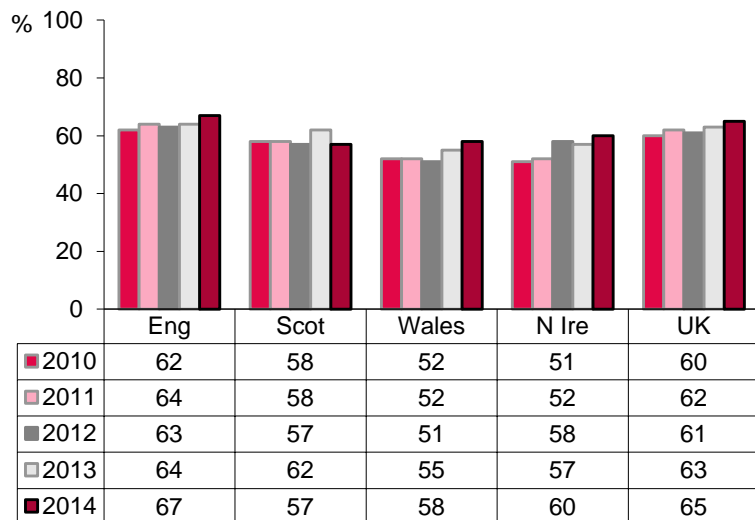
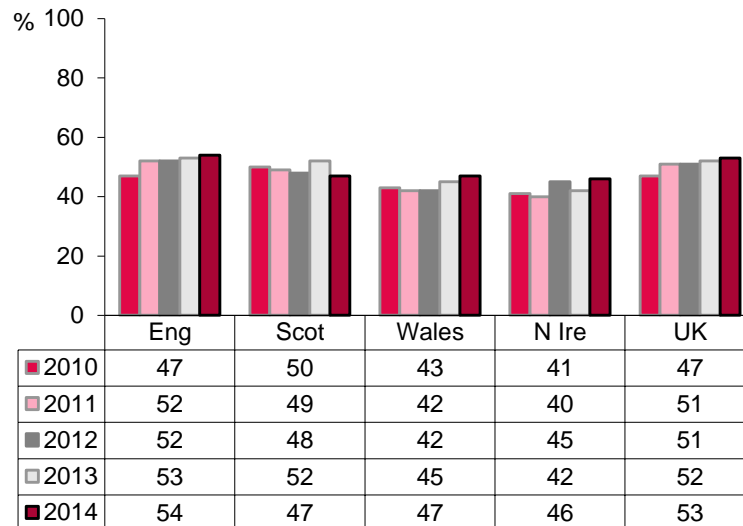
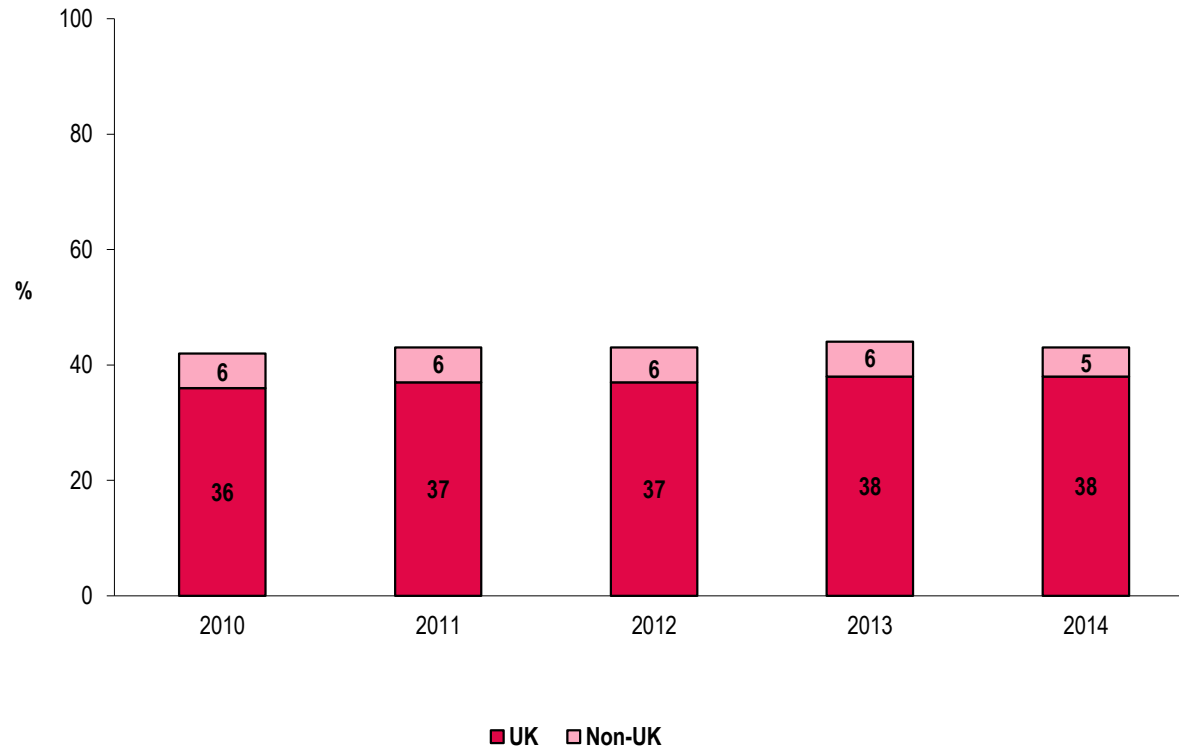


Fig. 6: UK and National: Annual Weekend Bedspace Occupancy 2010 – 2014



ORIGIN OF VISITORS

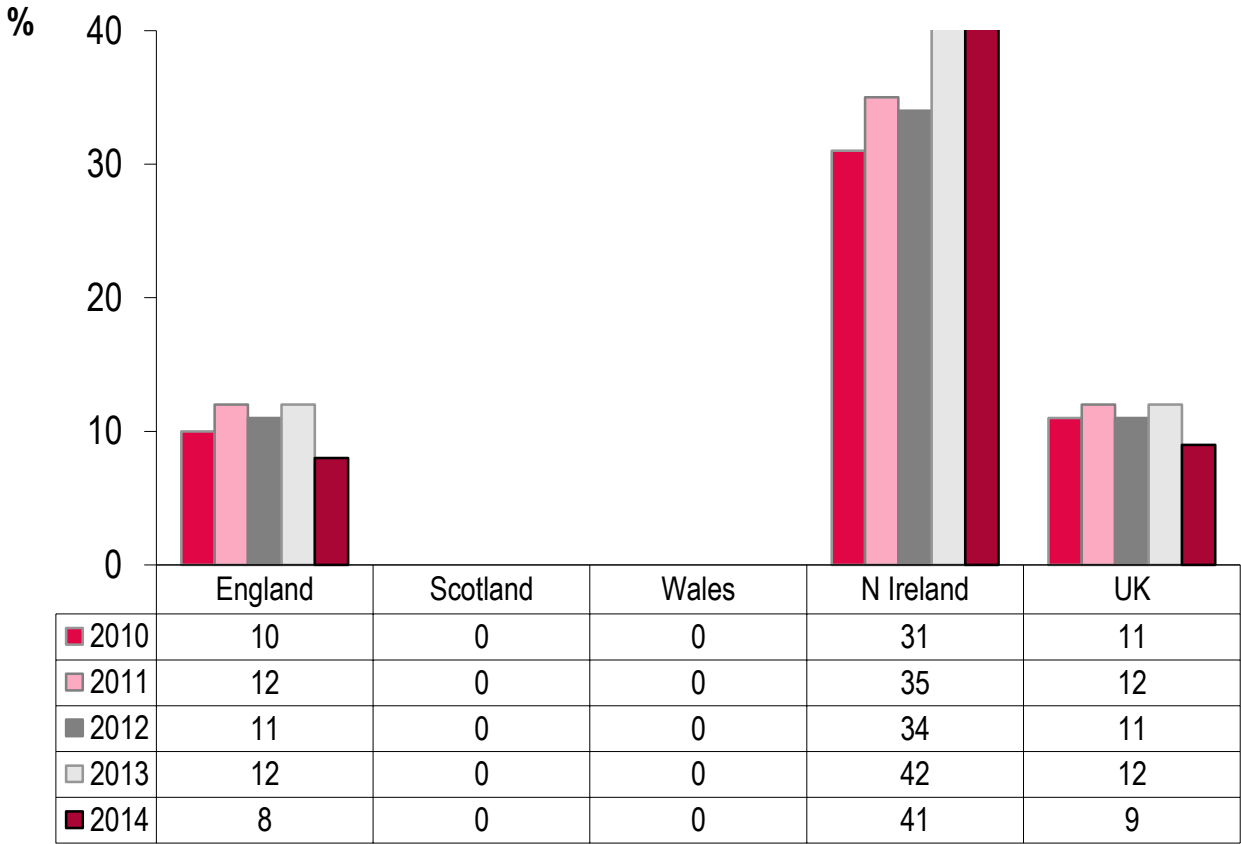
Fig. 7: UK: Annual Bedspace Occupancy 2010 - 2014 by Origin of Visitors



- Note that the occupancy figures in figure 7 and 8 are based on only those establishments able to differentiate between UK and non-UK visitors which is less than the total sample
- In addition the figures in figure 7 are calculated only on figures for England, Wales and Northern Ireland while those in figure 8 are calculated only on figures for England and Northern Ireland.



FIG 8: UK AND NATIONAL: ANNUAL NON-UK ARRIVALS AS A PERCENTAGE OF ALL ARRIVALS 2010-2014



➤ Due to changes in the data collection, it is no longer possible to provide UK/non UK figures for Scotland or figures relating to arrivals for Wales

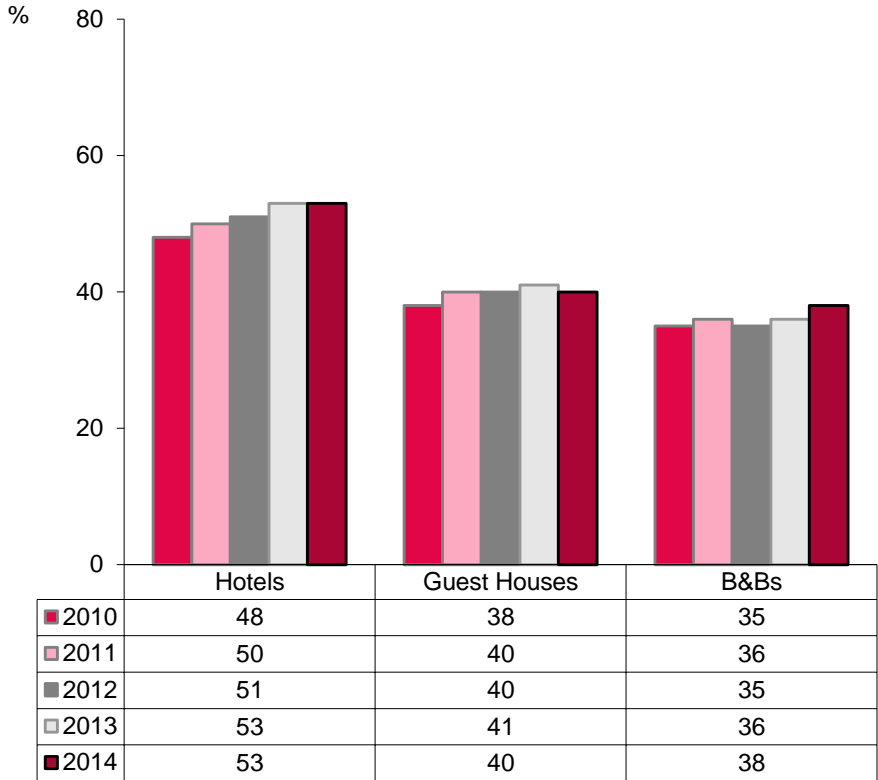


UK ANNUAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 9: UK: Annual Bedroom Occupancy 2010 - 2014 by Type of Establishment



Fig. 10: UK: Annual Bedspace Occupancy 2010 - 2014 by Type of Establishment



NATIONAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 11: National: Annual Bedroom Occupancy 2013 and 2014 by Type of Establishment

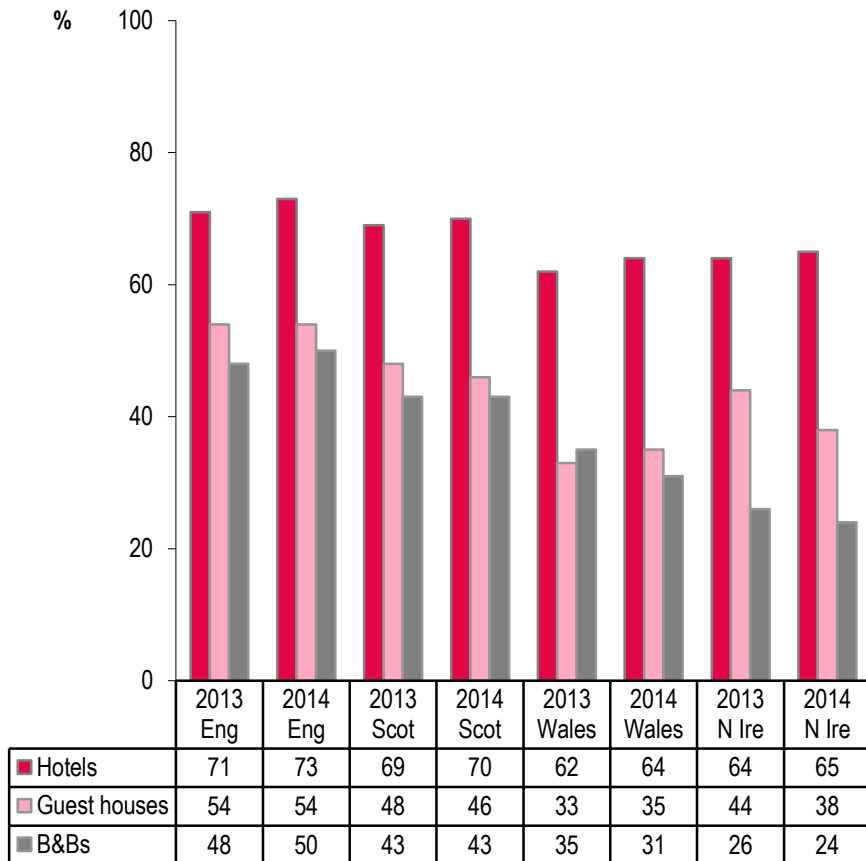
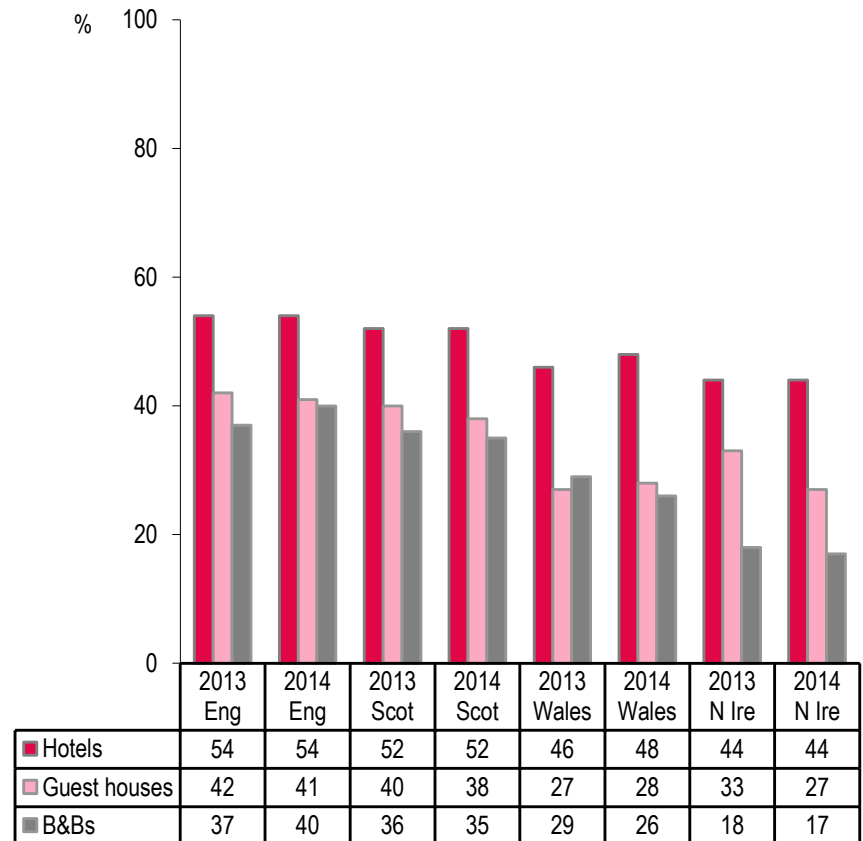


Fig. 12: National: Annual Bedspace Occupancy 2013 and 2014 by Type of Establishment



UK OCCUPANCY BY LOCATION OF ESTABLISHMENT

Fig. 13: UK: Annual Bedroom Occupancy 2010 - 2014 by Location of Establishment

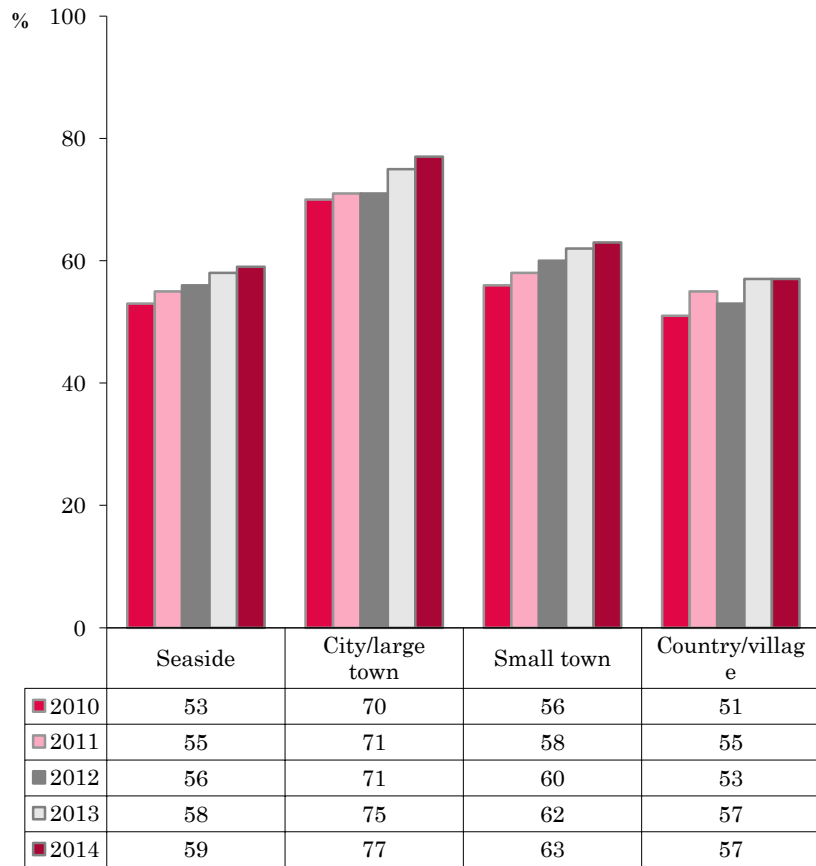
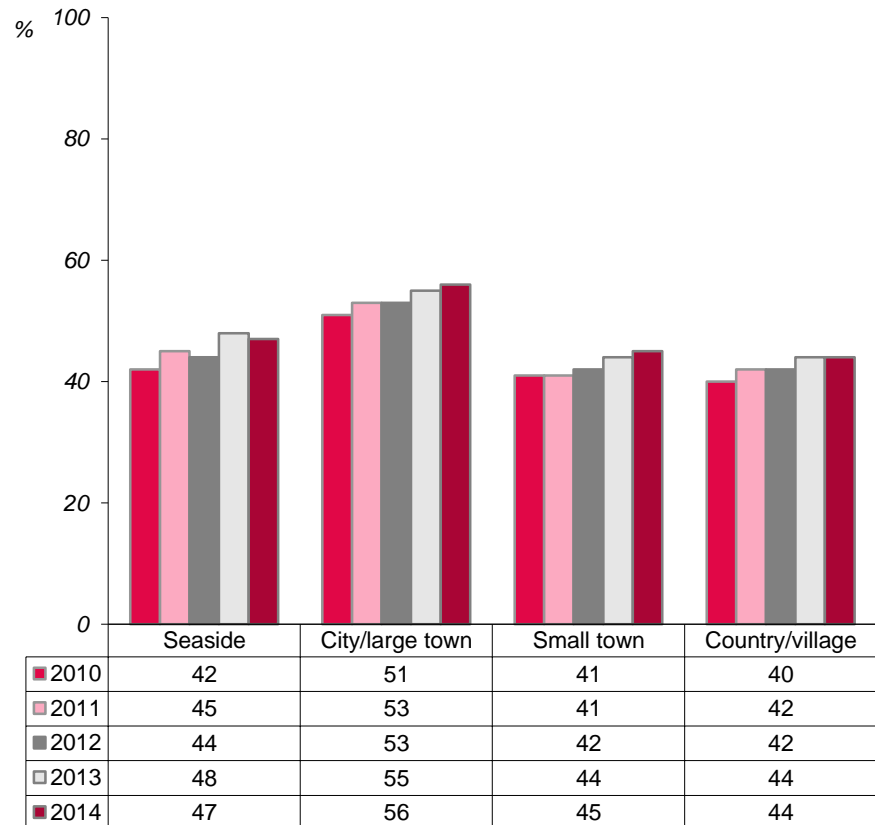
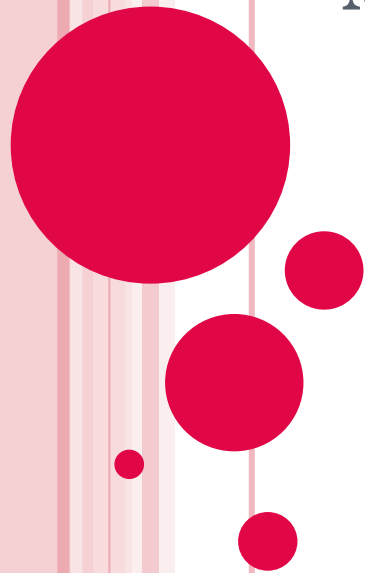


Fig. 14: UK: Annual Bedspace Occupancy 2010 - 2014 by Location of Establishment



BACKGROUND AND METHODOLOGY



BACKGROUND TO THE SURVEY

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) 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 June 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)



BACKGROUND TO THE SURVEY (CONT'D)

- This document summarises the main trends from the surveys carried out in England, Scotland, Wales and Northern Ireland which have been aggregated to provide occupancy figures for the UK as a whole.
- The individual surveys are conducted according to a common specification to ensure the production of comparable data for the whole of the UK.
- The survey includes hotels (including motels, lodges and inns), guesthouses and private houses offering bed and breakfast to tourists (including farmhouses). It should be noted that only in Northern Ireland, where compulsory registration of tourist accommodation ensures an accurate stock record, is there a definition of the various types of accommodation. In England, Scotland and Wales the type is defined by each accommodation establishment itself in answering a questionnaire and therefore, because the criteria are not objectively defined, the distinction between types is not always clear and may vary slightly.

In 2014 there were about 47,000 establishments of this type in the UK which were known to the tourist boards, with a total of just over 2 million bedspaces available daily.



METHODOLOGICAL DETAILS

Figure 15: Distribution of total known accommodation stock 2014: Number of establishments

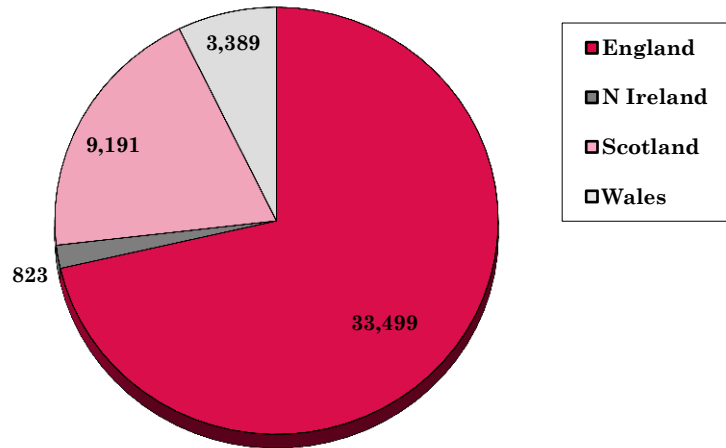
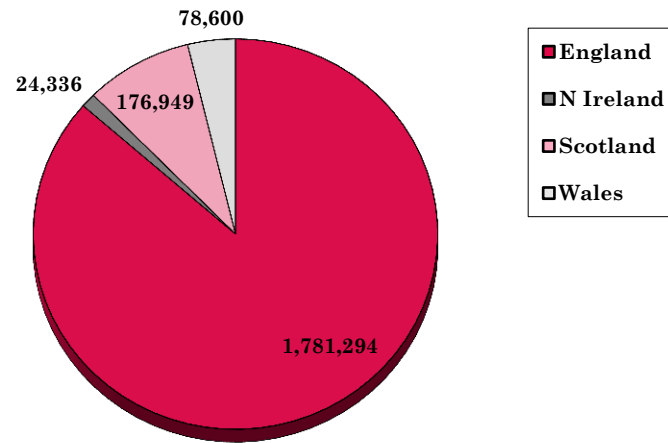


Figure 16: Distribution of total known accommodation stock 2014: Number of bedspaces



- Each month between 2,324 and 2,537 returned data and the occupancy rates in the report are calculated from these monthly samples.
- The occupancy figures in this summary are calculated on the accommodation available each month - i.e. only open accommodation is included. In calculating figures for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area that month.



METHODOLOGICAL DETAILS (CONT'D)

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 June 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.

