



# UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Annual Report  
2013

June 2014

the **research** solution

trs

# INTRODUCTION

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2013 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 and national average annual bedroom occupancy for 2013 saw an increase against 2012 levels, with the exception of Northern Ireland which remained flat (-1%). The largest increase was witnessed in Scotland, with bedroom occupancy levels up by 5 percentage points.
- ❖ The monthly UK bedroom occupancy levels saw increases in 9 out of the 12 months during 2013 with the remaining months flat with 2012 levels. July witnessed the largest increase of 6 percentage points, returning to similar levels witnessed in 2011, after the exceptionally wet weather across the majority of the UK during the peak summer months in 2012.
- ❖ Bedroom Occupancy levels in England increased by 3 percentage points in February, 6 percentage points in July, 4 percentage points in August and 3 percentage points in November and December. All other months during 2013 remained on a par with levels witnessed in 2012.
- ❖ Scotland saw a significant increase in bedroom occupancy levels during January of 13 percentage points and 15 percentage points during February. March, May, September and October all increased by 3 percentage points, with August and July witnessing an increase of 6 and 5 percentage points respectively. June and December increased by 2 percentage points and all other months remained flat against levels achieved in the previous year.
- ❖ Both Wales and Northern Ireland witnessed fluctuating occupancy levels during 2013 with Wales seeing increases during January, February, April May, July, August, October, November and December and decreases in March and September.
- ❖ Northern Ireland saw increases in bedroom occupancy levels during January and November 2013. Decreases in bedroom occupancy levels were witnessed in April, June and July with all other months remaining flat when compared with 2012.



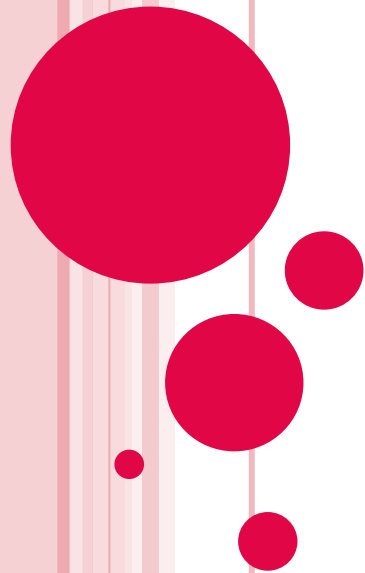
# SUMMARY: BEDSPACE OCCUPANCY

- ❖ UK bedspace occupancy levels remained flat against 2012 across most of the year. The exception being in July and August where occupancy levels increased by 5 percentage points respectively. May was up 4 percentage points and February witnessed an increase of 3 percentage points.
- ❖ England bedspace occupancy levels were similar to the UK with an increase in July and August of 5 percentage points, May an increase of 4 percentage points and February an increase of 2 percentage points. All other months remained static with 2012 levels.
- ❖ Scotland bedspace occupancy levels increased by 12 percentage points in February, and 7 percentage points during January. July and August were both up 5 percentage points on 2012 levels. During the latter part of 2013, September rose by 3 percentage points, whilst October saw an increase of 4 percentage points. All other months remained static with 2012.
- ❖ Wales bedspace occupancy saw increases of 9 percentage points in July 2013, 6 percentage points in January and May, 5 percentage points in November and 4 percentage points in February and August and 2 percentage points in December. The remaining months were on a par with levels witnessed during 2012.
- ❖ Northern Ireland bedspace occupancy levels increased by 5 percentage points during March 2013 and by 2 percentage points during February. Bedspace occupancy levels decreased by 8 percentage points in July, 6 percentage points in April, 5 percentage points in September and 3 percentage points in November. All other months remained static with 2012.

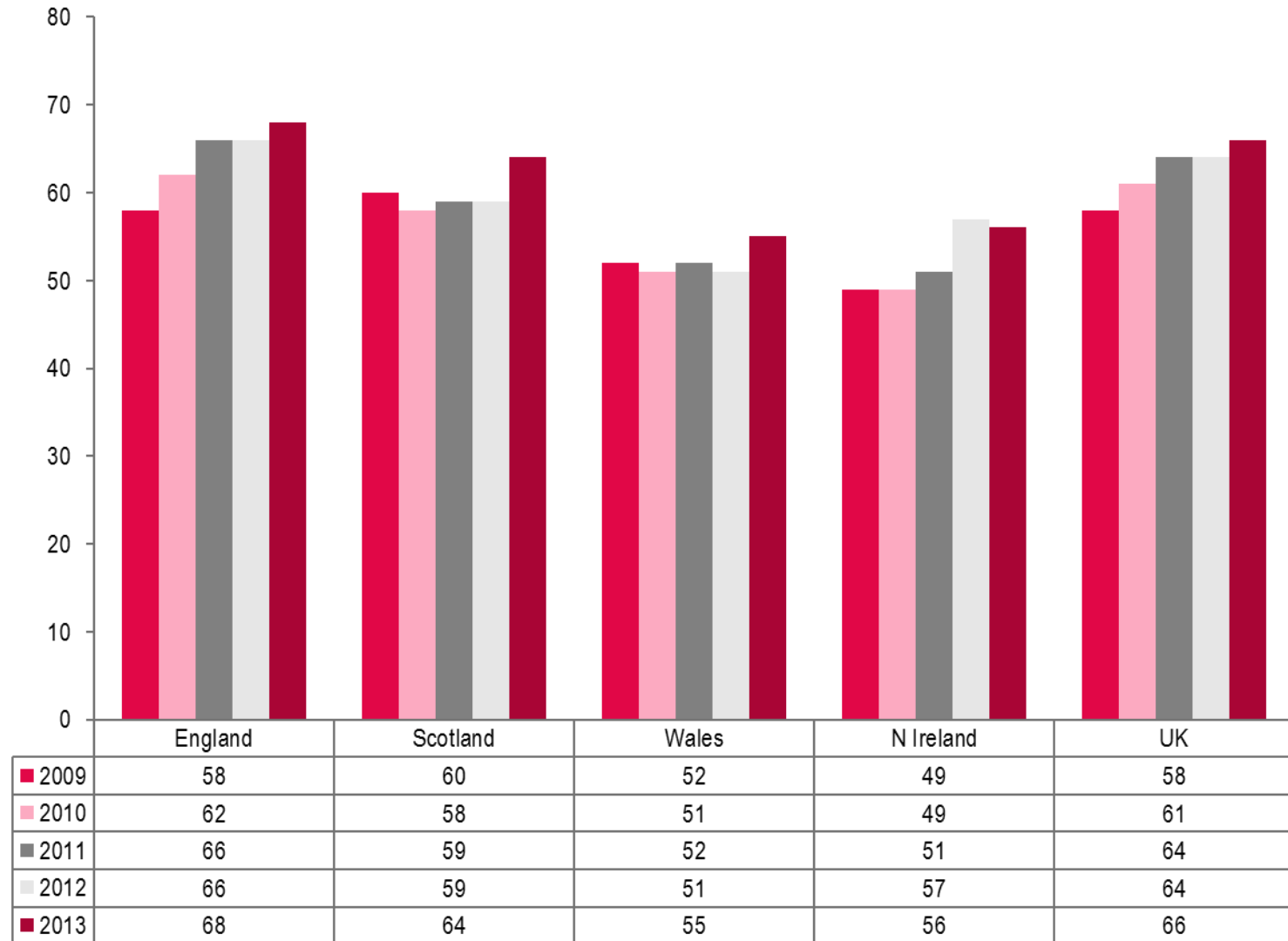
# SUMMARY: ROOM AND BEDSPACE OCCUPANCY IN DETAIL

- Across the UK as a whole, weekday bedroom and bedspace occupancy levels increased by 3 percentage points in bedroom occupancy and 2 percentage points in bedspace occupancy. Scotland witnessed a 5 percentage point increase in bedroom occupancy and a 3 percentage point increase in bedspace occupancy in 2013. Wales witnessed an increase of 3 percentage points in weekday bedroom occupancy and 2 percentage points in bedspace occupancy. England and Northern Ireland did not perform as well, with England seeing only a 2 percentage point increase in weekday bedspace occupancy.
- The UK weekend bedroom and bedspace occupancy levels were also similar to 2012, with the exception of Scotland where bedroom occupancy increased by 5 percentage points and bedspace occupancy by 4 percentage points in 2013. Wales also saw an increase of 4 percentage points in bedroom occupancy and 3 percentage points in bedspace occupancy.
- There was little change in both bedroom and bedspace occupancy by type of establishment across the UK, with hotels up by 2 percentage points in both measures of occupancy. Both guesthouses and B&B's saw little change from the levels achieved during 2012.. Bedroom occupancy levels in Northern Ireland saw a significant increase in both the hotel and guesthouse sector (7 and 16 percentage points respectively). Scotland witnessed a slight increase in the B&B sector of 2 percentage points and a decrease of 3 percentage points in the guesthouse sector. Wales saw a rise in both the hotel and B&B sector but a fall of 2 percentage points in guesthouses.
- A similar picture was seen in bedspace occupancy levels in Northern Ireland with an increase of 5 percentage points in the hotel sector and by 15 percentage points in the guesthouse sector. The percentage of bedspace occupancy for guesthouses in Scotland also witnessed an increase of 5 percentage points. As with bedroom occupancy, the Welsh guesthouse sector decreased by 2 percentage points.
- Across the UK as a whole, both bedroom and bedspace occupancy levels by location had increased when compared with 2012. City/Large Town and Countryside/Village locations were up in both bedroom and bedspace occupancy, by 4 and 2 percentage points respectively.

# BEDROOM OCCUPANCY: UK AND NATIONAL



# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY 2009-2013

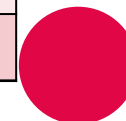




# UK AND NATIONAL: MONTHLY BEDROOM OCCUPANCY 2009-2013

**Table 1: UK and National: Bedroom Occupancy 2009- 2013**

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13
January	42	43	49	50	49	42	38	36	39	52	32	31	33	32	41	35	32	31	35	37	41	42	46	47	49
February	49	53	59	57	60	49	50	46	48	63	41	43	45	40	46	46	42	44	45	45	49	52	56	54	59
March	51	50	62	62	63	52	50	50	50	53	43	45	47	50	48	47	46	44	48	48	51	50	59	59	60
April	58	59	65	65	66	58	55	58	57	58	51	53	54	50	52	50	40	48	60	51	57	58	63	63	64
May	61	65	68	69	71	67	66	67	67	70	56	57	57	55	61	54	53	55	62	61	61	64	67	68	70
June	65	73	75	73	75	70	72	74	73	75	62	63	63	60	60	56	58	65	71	67	65	72	74	72	74
July	67	77	77	72	78	74	74	73	72	77	66	64	64	60	66	58	61	60	70	68	68	76	75	71	77
August	67	72	72	73	77	79	78	79	77	83	67	65	65	65	71	65	63	67	74	74	69	72	72	73	78
September	69	75	76	77	77	70	72	74	73	76	64	62	62	65	63	55	60	60	67	66	69	74	75	75	76
October	64	69	69	71	72	61	62	60	62	65	55	55	53	52	55	49	50	52	59	59	63	67	67	68	70
November	56	61	64	64	67	52	51	52	51	52	45	45	47	44	50	40	43	46	50	52	55	58	61	61	64
December	51	52	55	56	59	44	36	41	41	43	39	34	36	40	43	36	35	38	43	42	49	49	52	53	56



# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY AVERAGES 2009-2013

**Table 1a: UK and National: Bedroom Occupancy Averages 2009- 2013**

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13
April–Oct Average	64	70	72	71	74	68	68	69	69	72	60	60	60	58	61	55	55	58	66	64	65	69	70	70	73
July–Sept Average	68	75	75	74	77	74	75	75	74	79	66	64	64	63	67	59	61	63	70	69	68	74	74	73	77
Annual Average	58	62	66	66	68	60	58	59	59	64	52	51	52	51	55	49	49	51	57	56	58	61	64	64	66



# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS 2009-2013

**Table 2: UK and National: Bedroom Occupancy Trends 2009- 2013**

	England			Scotland			Wales			Northern Ireland			UK		
	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13
January	45	47	50	39	38	38	32	32	32	33	33	34	43	45	47
February	54	56	58	48	48	47	43	43	42	44	44	45	52	54	55
March	54	58	62	51	50	50	45	47	49	46	46	47	53	56	59
April	61	63	65	57	57	57	53	52	51	46	49	56	59	61	63
May	65	67	69	67	67	67	57	56	56	54	57	60	64	66	68
June	71	74	74	72	73	73	63	62	61	60	65	69	70	73	73
July	74	75	74	74	73	72	65	63	61	60	64	67	73	74	72
August	70	72	73	79	78	78	66	65	65	65	68	72	71	72	73
September	73	76	77	72	73	73	63	63	64	58	62	65	73	75	75
October	67	70	70	61	61	61	54	53	52	50	54	57	66	67	68
November	60	63	64	52	51	51	46	45	45	43	46	49	58	60	61
December	53	54	56	40	39	41	36	37	39	36	39	41	50	51	53



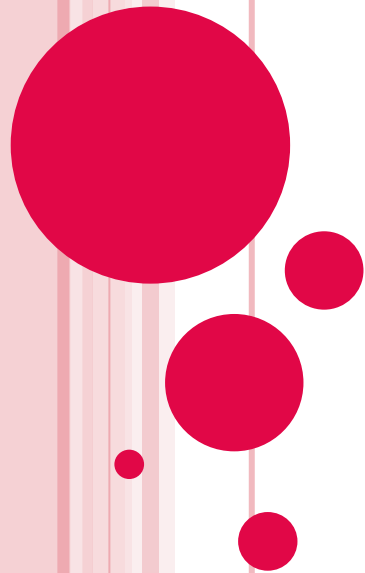
# UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS - AVERAGES 2009-2013

**Table 2a: UK and National: Bedroom Occupancy Trends 2009- 2013**

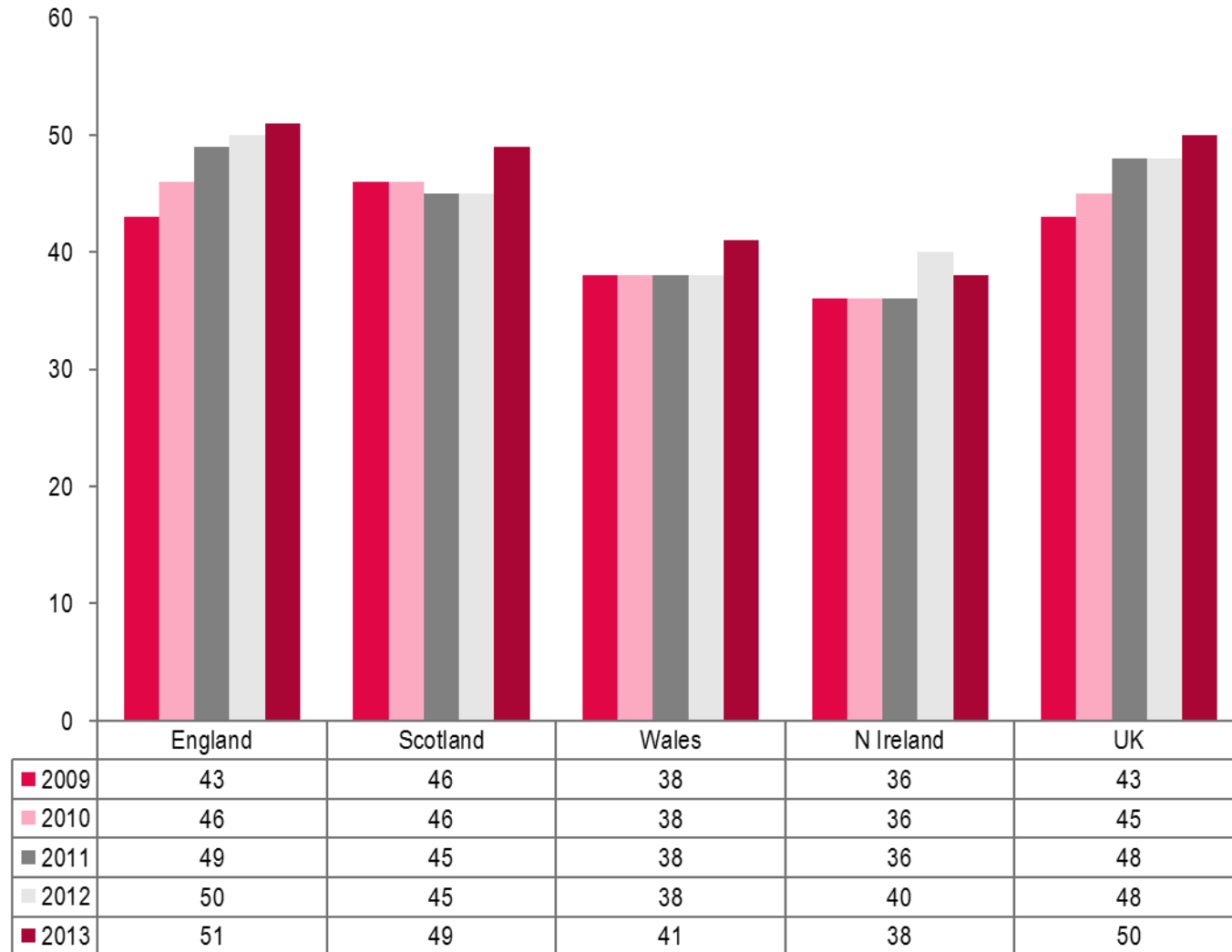
	England			Scotland			Wales			Northern Ireland			UK		
	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13
April–Oct Average	69	71	71	68	69	69	60	59	59	56	60	63	68	70	70
July–Sept Average	73	75	74	75	75	74	65	64	63	61	65	68	72	74	73
Annual Average	62	65	66	59	59	59	52	51	51	50	52	55	61	63	64



# **BEDSPACE OCCUPANCY: UK AND NATIONAL**



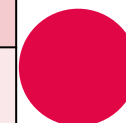
# UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY 2009-2013



# UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY 2009-2013

**Table 3: UK and National: Bedspace Occupancy 2009- 2013**

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13
January	27	28	34	36	35	29	27	25	27	35	21	20	21	21	27	24	20	21	25	23	27	27	32	33	34
February	35	36	42	42	44	35	36	33	33	45	28	30	30	29	33	33	30	31	29	31	35	36	40	40	43
March	36	36	43	46	47	37	36	34	36	39	30	32	32	36	35	32	31	30	33	38	36	36	41	44	45
April	43	44	50	50	49	46	43	46	43	43	38	40	40	39	38	36	33	37	42	36	43	43	49	48	47
May	47	48	51	51	55	53	52	51	51	54	43	43	42	40	46	39	37	39	42	43	47	48	50	50	54
June	49	53	56	57	57	55	56	58	57	58	45	47	46	46	45	40	43	44	48	46	49	53	55	56	56
July	54	59	60	55	60	62	61	61	58	63	51	51	48	45	54	46	49	42	54	46	55	59	59	55	60
August	57	58	59	59	64	67	66	65	64	69	55	53	52	54	58	53	50	52	56	54	58	59	59	59	64
September	51	56	56	58	57	54	56	57	55	58	48	47	45	48	48	38	43	42	46	41	51	55	55	57	56
October	48	52	52	53	53	47	48	46	45	49	40	40	39	39	40	35	28	36	42	40	47	50	50	51	51
November	38	43	47	48	49	37	37	37	36	37	30	29	31	31	36	27	29	33	35	32	37	41	44	45	46
December	36	39	42	42	43	33	28	31	32	33	28	23	25	30	32	26	26	28	30	29	35	36	39	40	41



# UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY

## TRENDS - AVERAGES

### 2009-2013

**Table 3a: UK and National: Average Bedspace Occupancy 2009- 2013**

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13	09	10	11	12	13
April–Oct Average	50	53	55	55	56	55	55	55	53	56	46	46	45	44	47	41	42	42	47	44	50	53	54	54	56
July–Sept Average	54	58	58	57	60	61	61	61	59	63	51	50	48	49	53	46	47	45	52	47	55	58	58	57	60
Annual Average	43	46	49	50	51	46	46	45	45	49	38	38	38	38	41	36	36	36	40	38	43	45	48	48	50

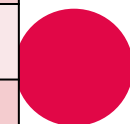




# UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY TRENDS 2009-2013

**Table 4: UK and National: Bedspace Occupancy Trends 2009- 2013**

	England			Scotland			Wales			Northern Ireland			UK		
	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13
January	30	33	35	27	26	26	21	21	21	22	22	22	29	31	33
February	38	40	42	35	34	33	29	30	29	31	30	30	37	39	40
March	38	42	45	36	35	35	31	33	35	31	31	31	38	40	43
April	46	48	50	45	44	44	39	40	39	35	37	37	45	47	48
May	49	50	51	52	51	51	43	42	41	38	39	39	48	49	50
June	53	55	57	56	57	57	46	46	46	42	45	45	52	55	56
July	58	58	57	61	60	59	50	48	46	46	48	48	58	58	56
August	58	59	59	66	65	64	53	53	53	52	53	53	59	59	59
September	54	57	57	56	56	56	47	47	47	41	44	44	54	56	56
October	51	52	53	47	46	45	40	39	39	33	35	35	49	50	51
November	43	46	48	37	37	36	30	30	31	30	32	32	41	43	45
December	39	41	42	31	30	32	25	26	28	27	28	28	37	38	40



# UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY TRENDS - AVERAGES 2009-2013

**Table 4: UK and National: Bedspace Occupancy Trends 2009- 2013**

	England			Scotland			Wales			Northern Ireland			UK		
	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13	09-11	10-12	11-13
April–Oct Average	53	54	55	55	54	54	46	45	44	42	44	44	52	54	54
July–Sept Average	57	58	57	61	60	60	50	49	49	46	48	48	57	58	57
Annual Average	46	48	50	46	45	45	38	38	38	36	37	37	45	47	48



# UK AND NATIONAL ANNUAL WEEKDAY OCCUPANCY 2009-2013

Fig. 3: UK and National: Annual Weekday  
Bedroom Occupancy 2009 – 2013

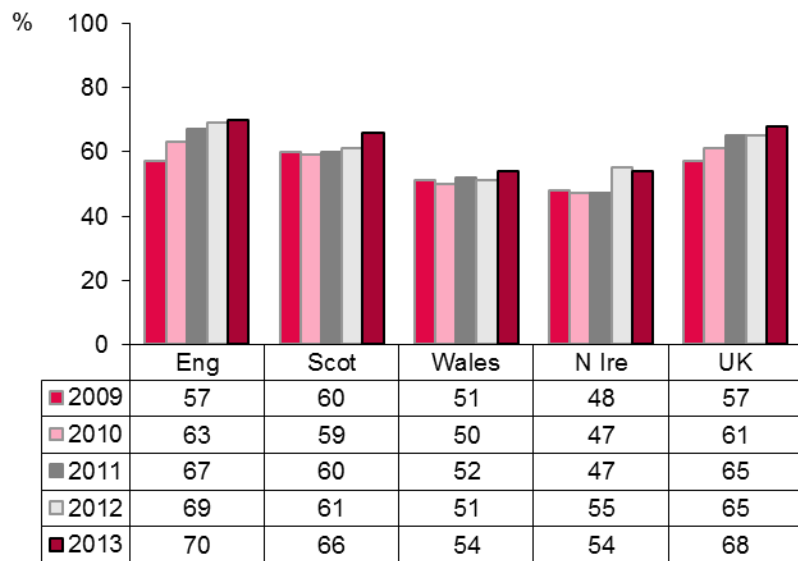
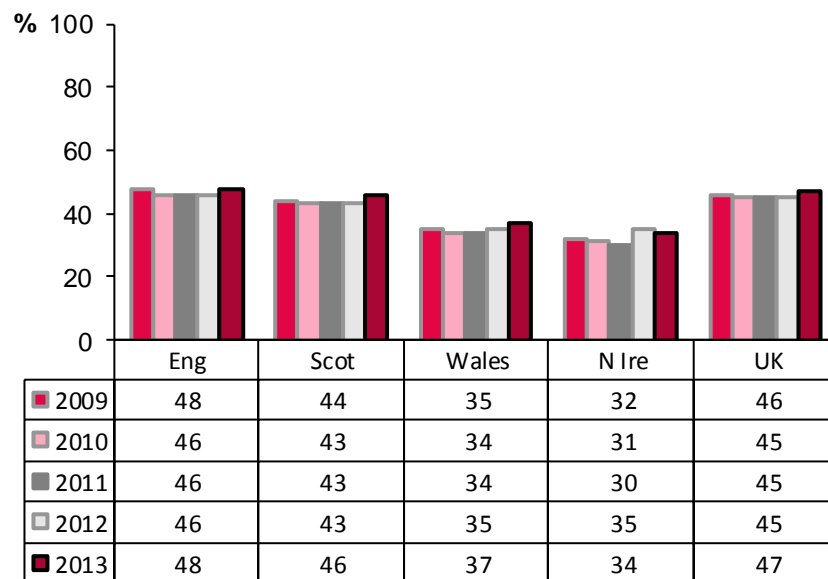
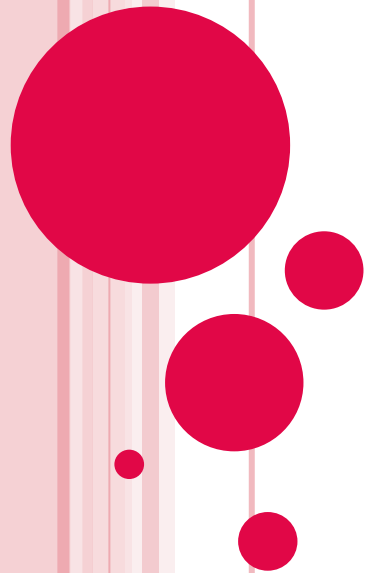


Fig. 4: UK and National: Annual Weekday  
Bedspace Occupancy 2009 - 2013



# OCCUPANCY IN DETAIL: UK AND NATIONAL



# UK AND NATIONAL ANNUAL WEEKEND OCCUPANCY 2009-2013

Fig. 5 UK and National: Annual Weekend Bedroom Occupancy 2009 – 2013

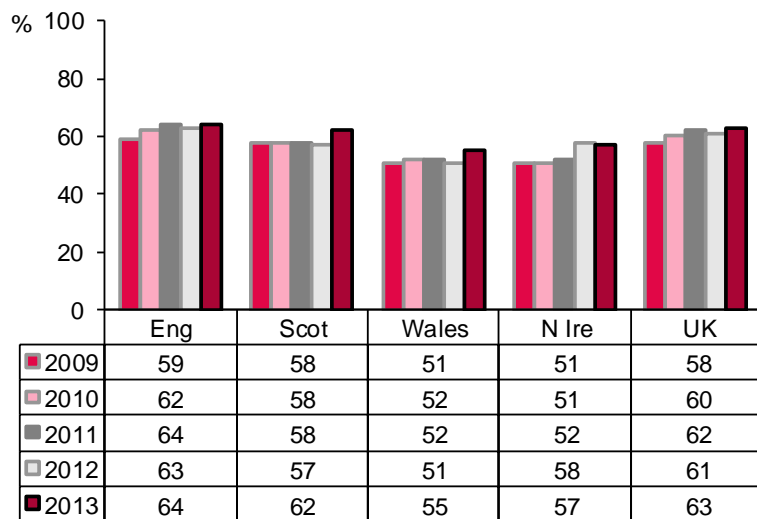
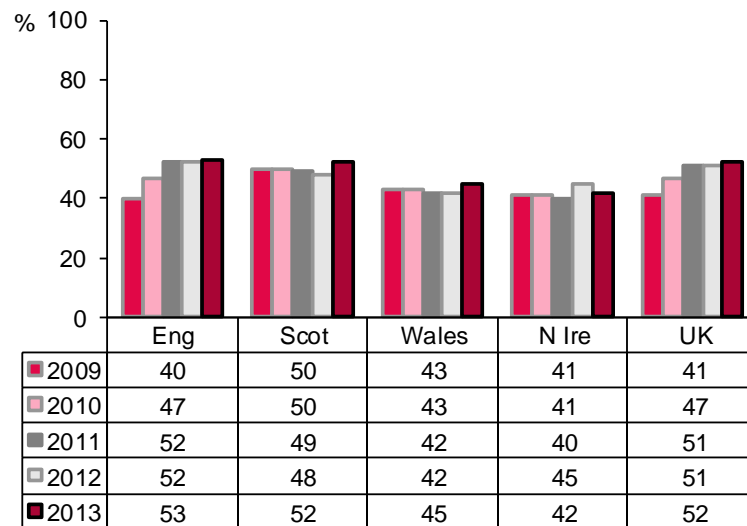
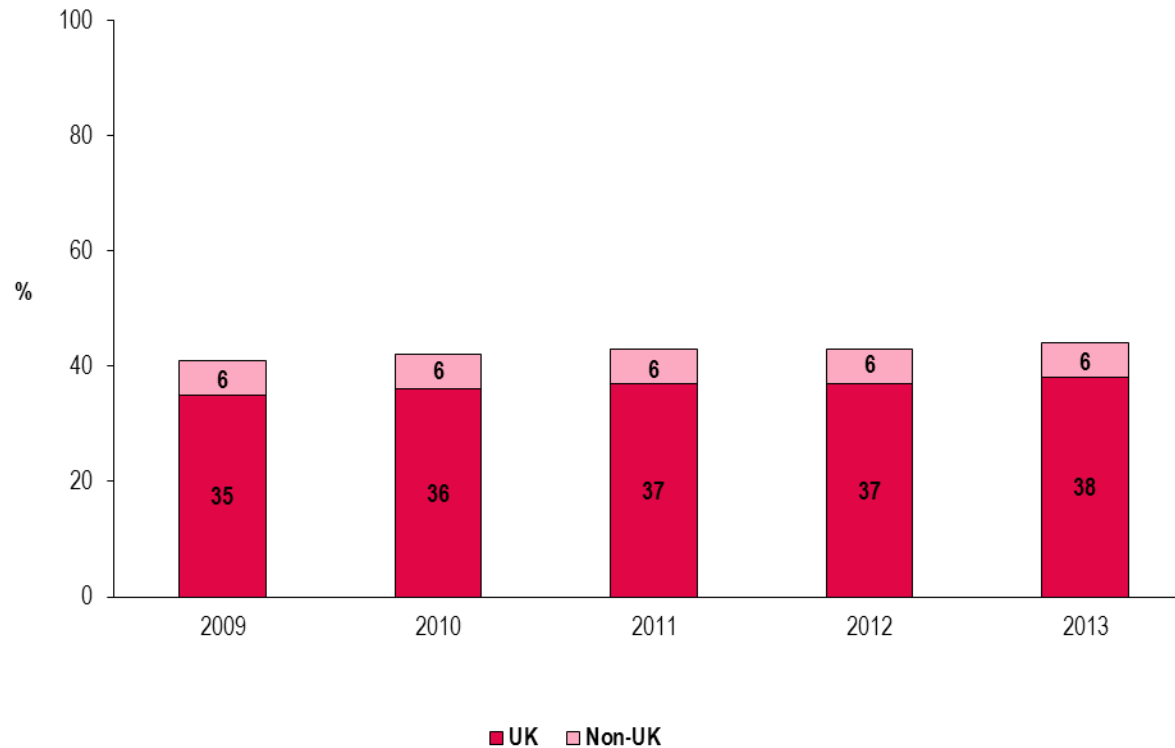


Fig. 6: UK and National: Annual Weekend Bedspace Occupancy 2009 – 2013



# ORIGIN OF VISITORS

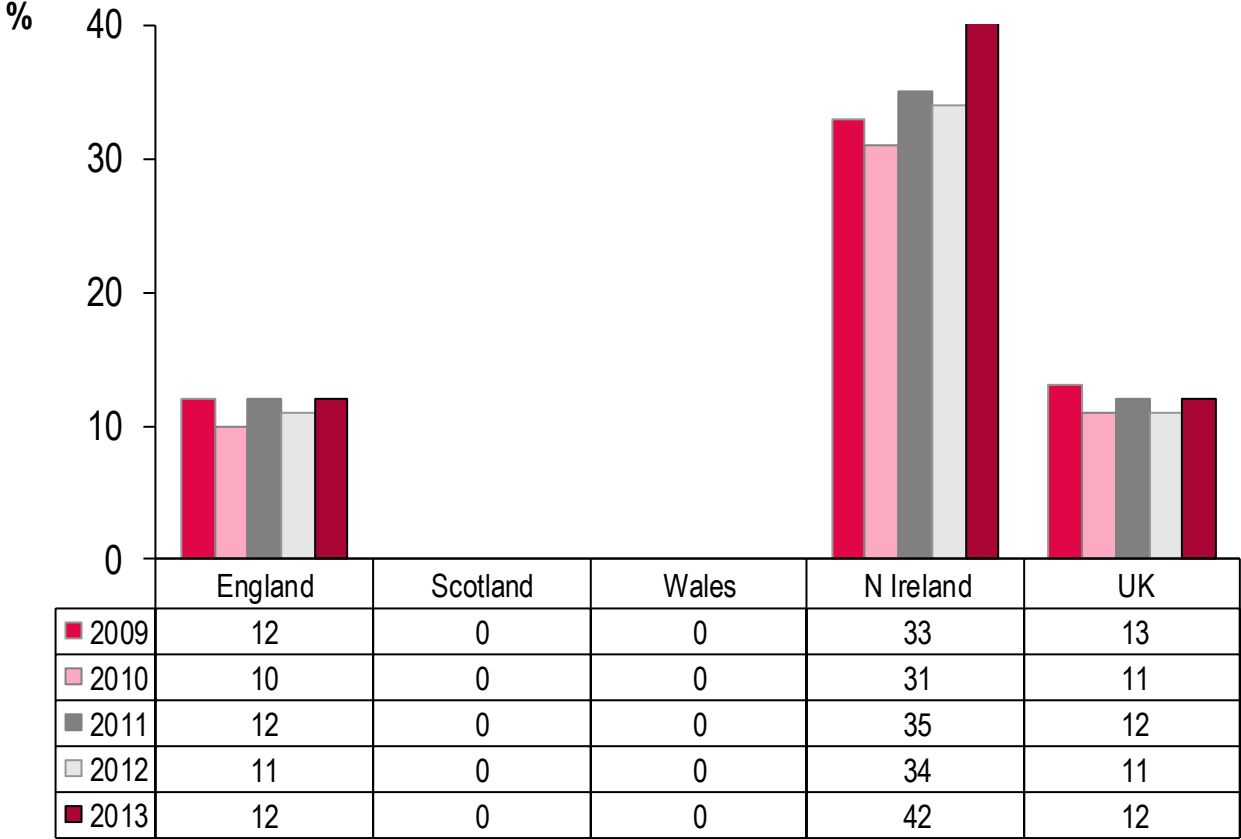
Fig. 7: UK: Annual Bedspace Occupancy 2009 - 2013 by Origin of Visitors



- 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 2009-2013



➤ 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 2009 - 2013 by Type of Establishment

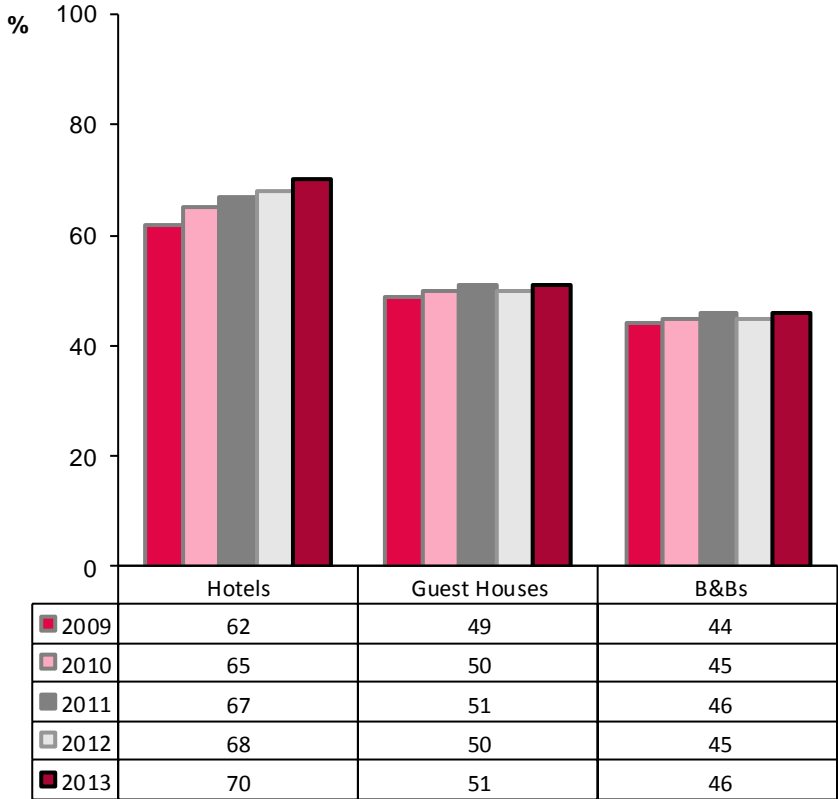


Fig. 10: UK: Annual Bedspace Occupancy 2009 - 2013 by Type of Establishment





# NATIONAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 11: National: Annual Bedroom Occupancy 2012 and 2013 by Type of Establishment

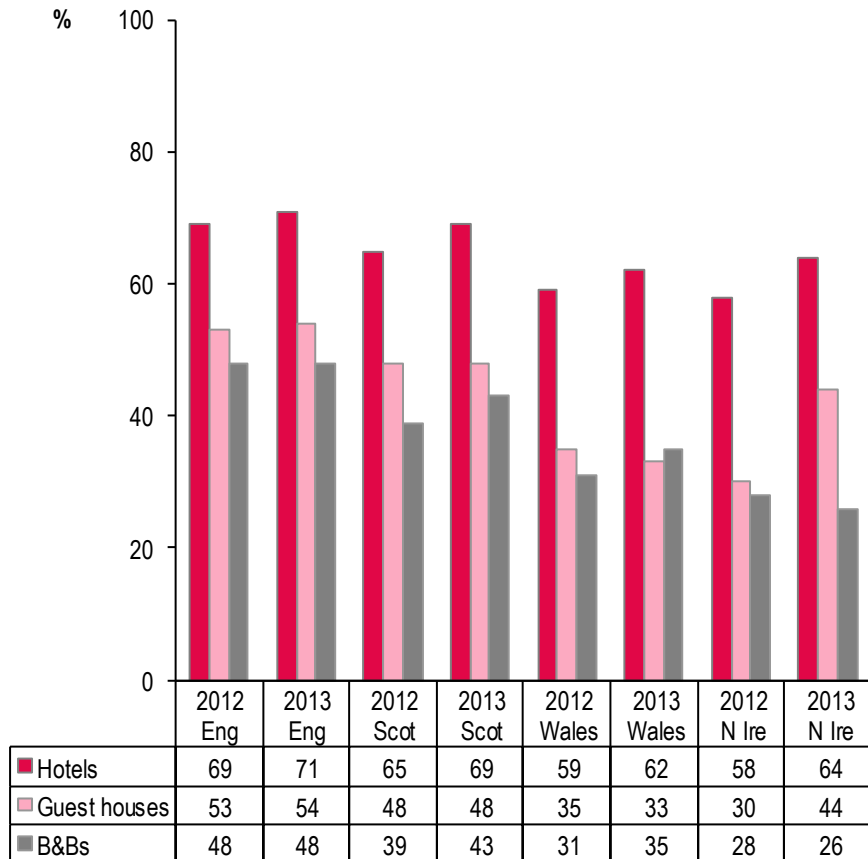
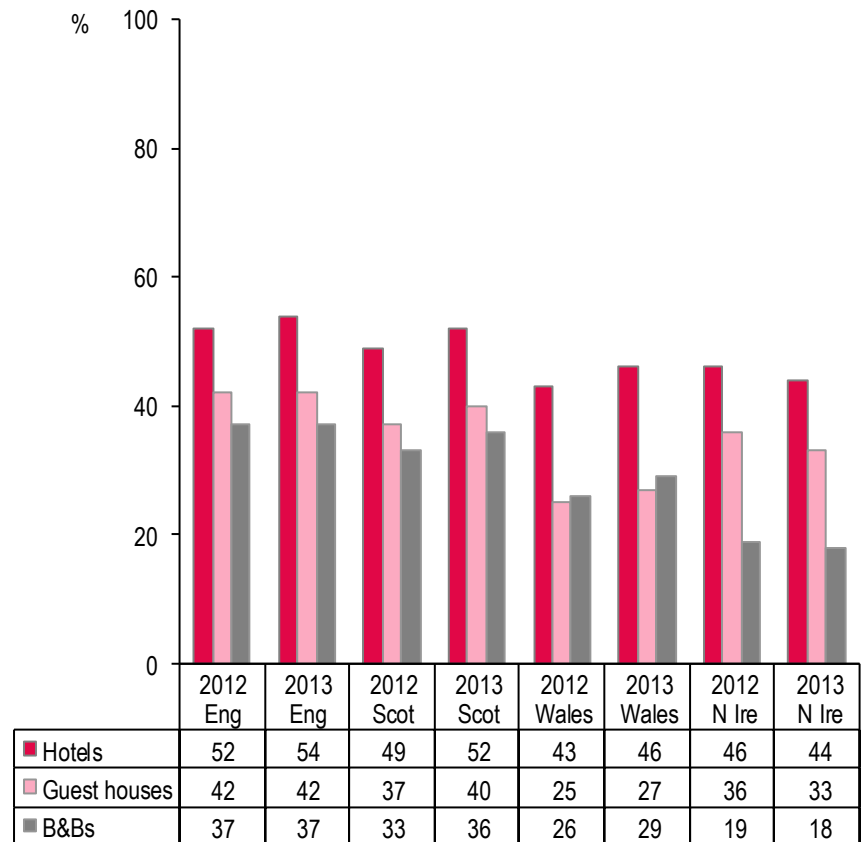


Fig. 12: National: Annual Bedspace Occupancy 2012 and 2013 by Type of Establishment



# UK OCCUPANCY BY LOCATION OF ESTABLISHMENT

Fig. 13: UK: Annual Bedroom Occupancy 2009 - 2013 by Location of Establishment

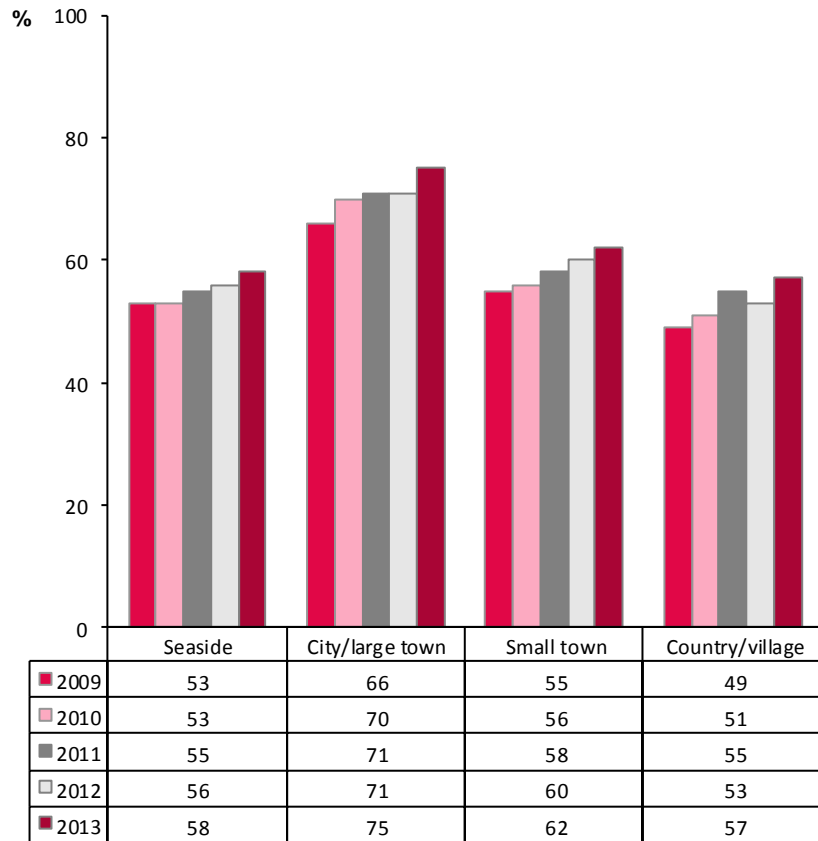
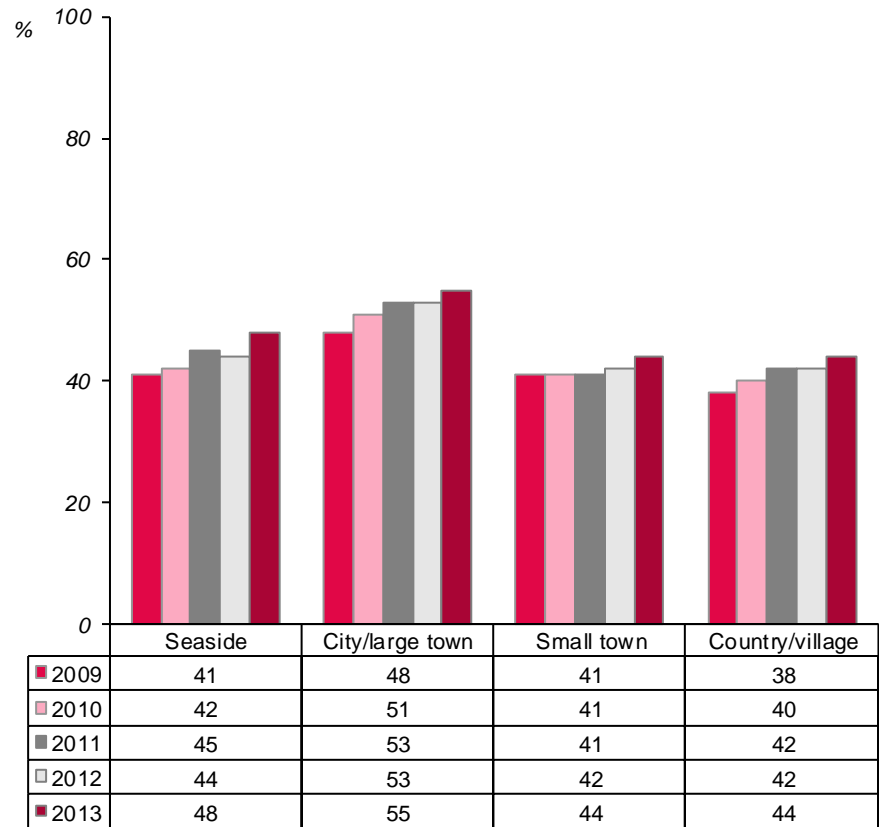
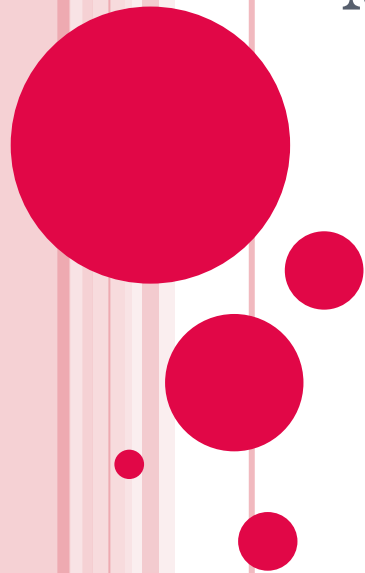


Fig. 14: UK: Annual Bedspace Occupancy 2009 - 2013 by Location of Establishment



# 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 2013 there were about 46,000 establishments of this type in the UK which were known to the tourist boards, with a total of just over 1.6 million bedspaces available daily.



# METHODOLOGICAL DETAILS

Figure 15: Distribution of total known accommodation stock 2013: Number of establishments

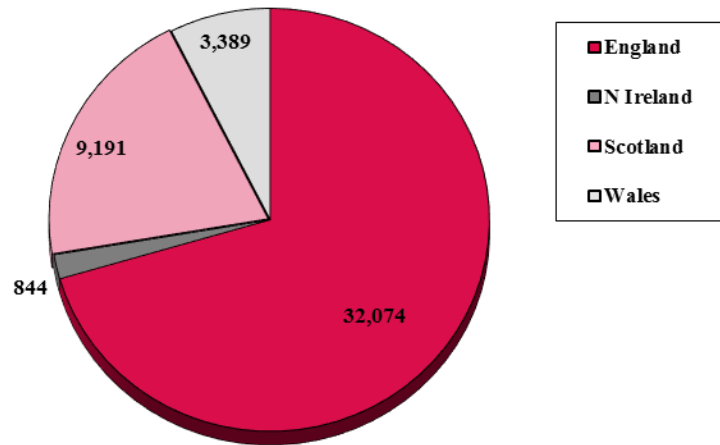
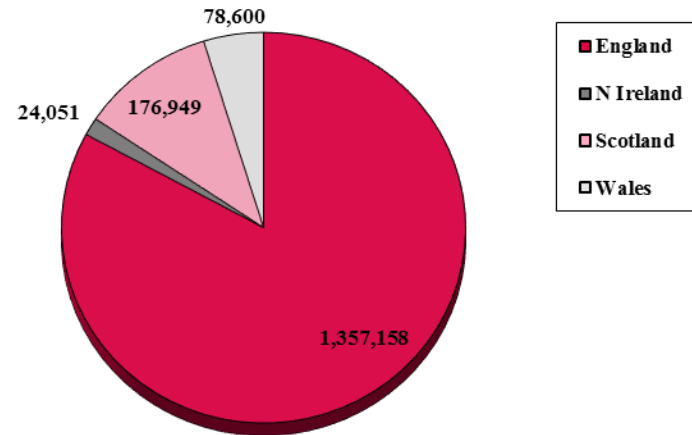


Figure 16: Distribution of total known accommodation stock 2013: Number of bedspaces



- Each month between 2,016 and 2,717 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.

