



# UNITED KINGDOM OCCUPANCY SURVEY

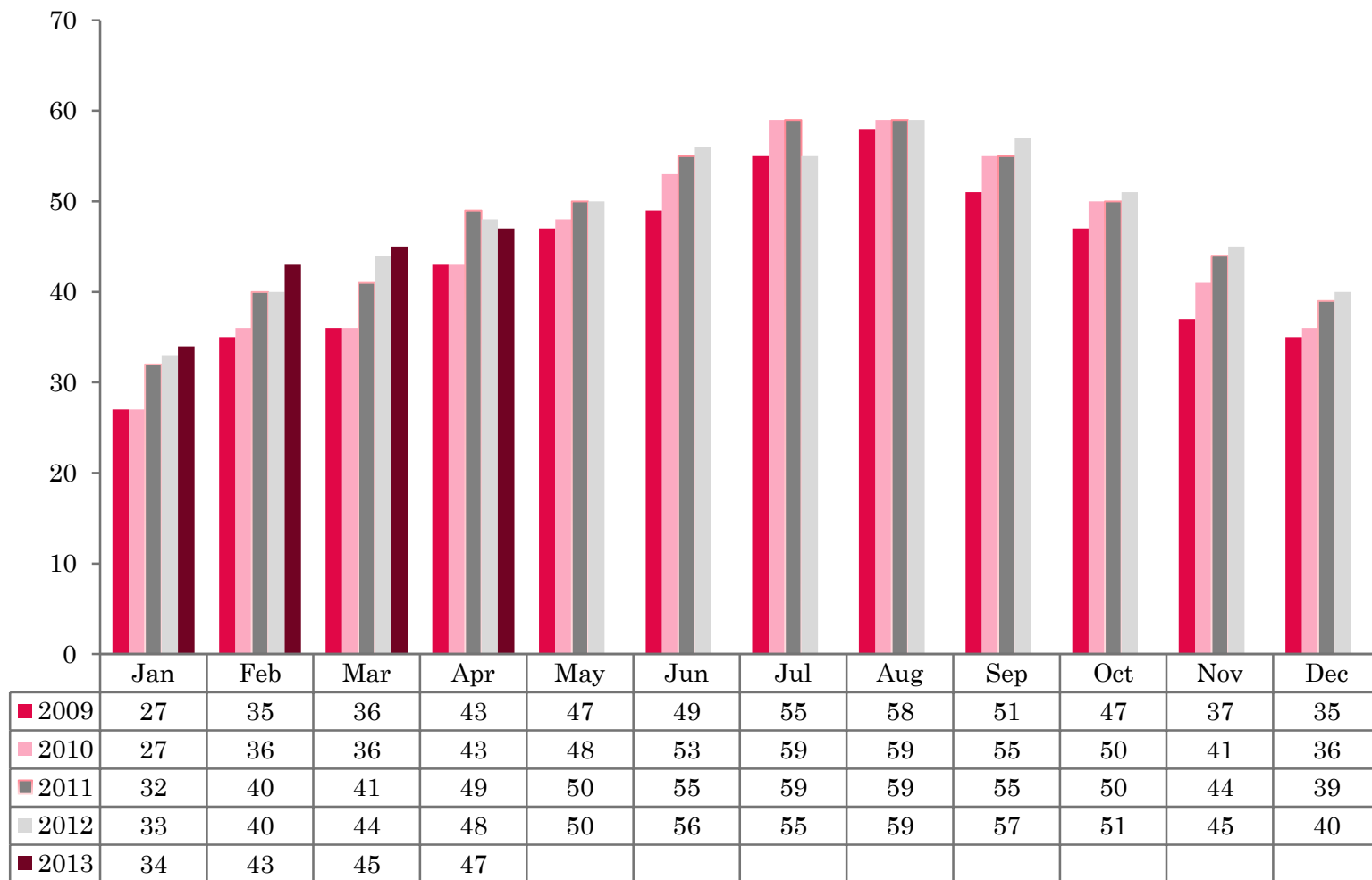
**Serviced Accommodation Summary Report**  
**April 2013**

# UK OCCUPANCY SURVEY

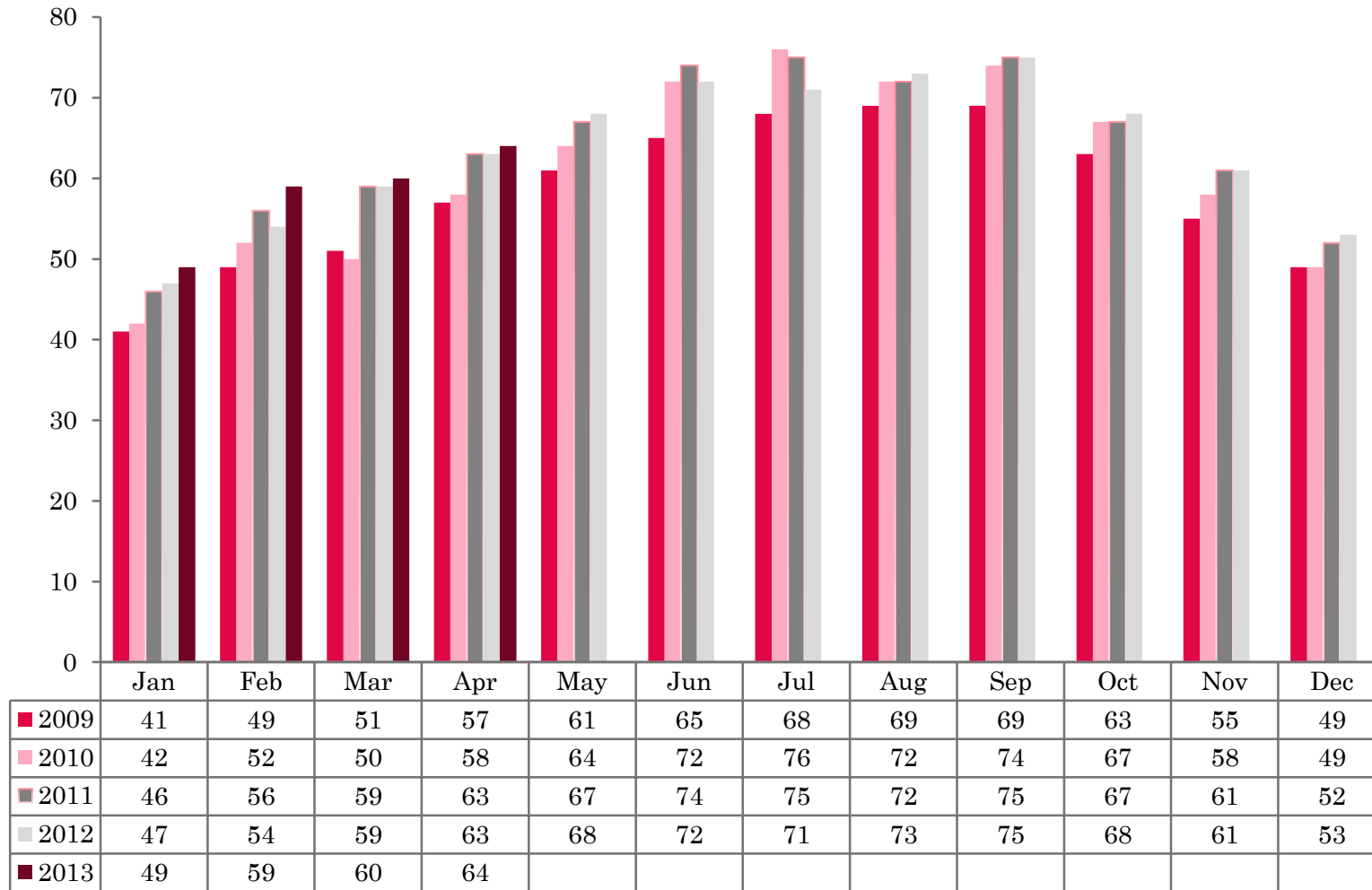
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2009 - 2013



# UK BEDROOM OCCUPANCY 2009 - 2013

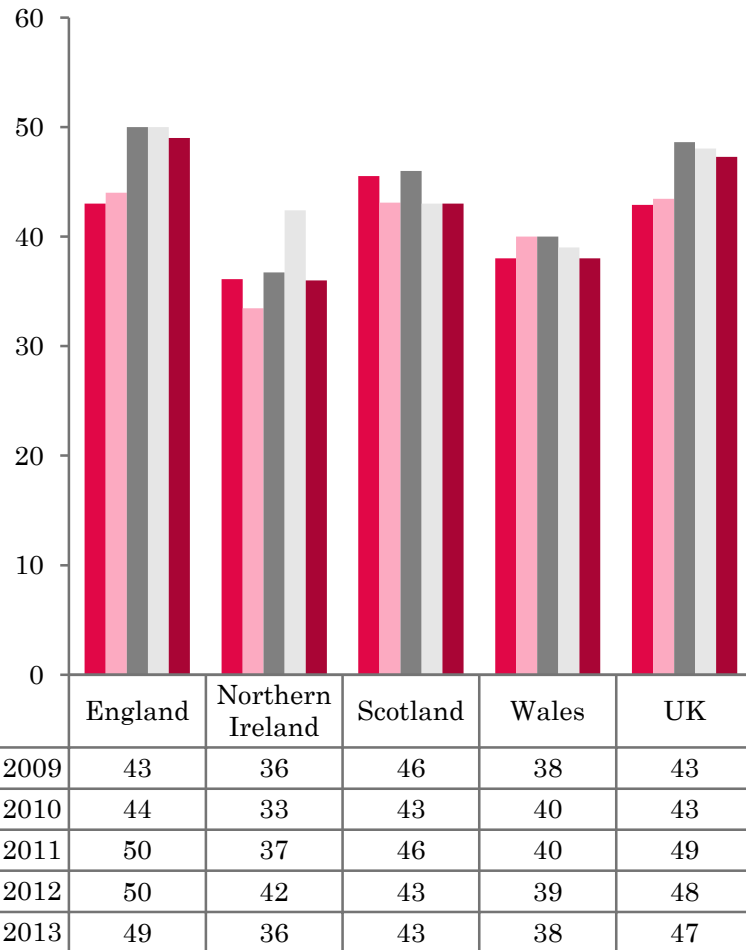


❖ 2,153 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

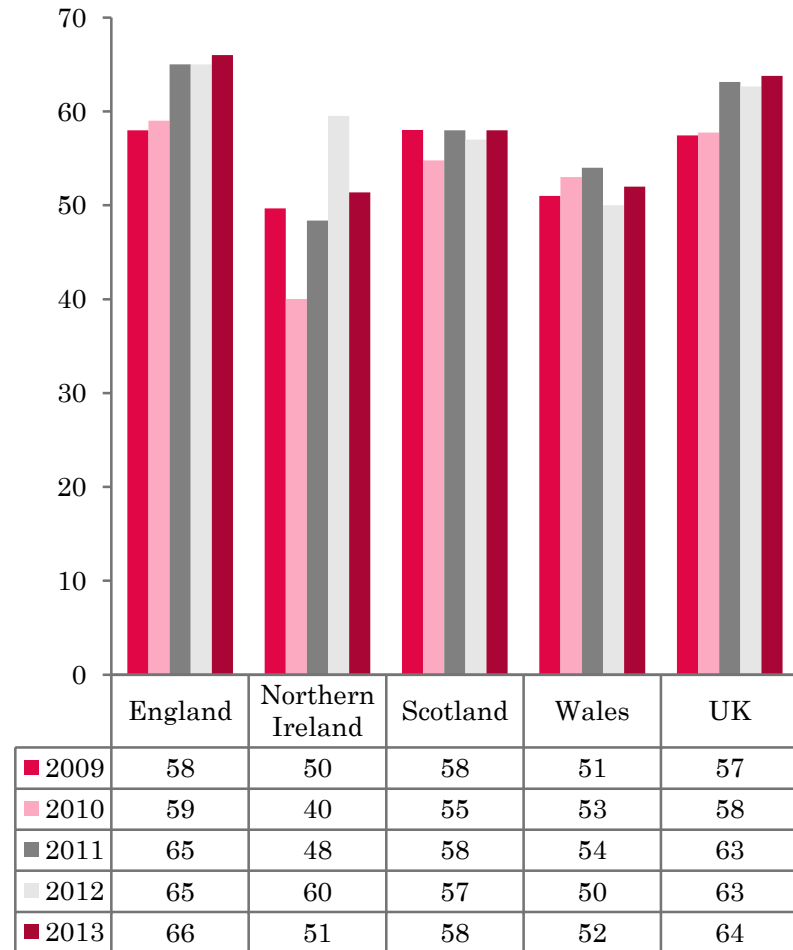
❖ UK bedspace occupancy (47%) had fallen by a single percentage point and UK bedroom occupancy (64%) had risen by 1 percentage point, when compared with the same period in April 2012.



## NATIONAL BEDSPACE OCCUPANCY APRIL 2009-2013



## NATIONAL ROOM OCCUPANCY APRIL 2009-2013



- Bedspace occupancy varied from 49% in England to 36% in Northern Ireland during April 2013.
- In the UK during April 2013, bed occupancy had fallen slightly when compared with the same period the previous year. Room occupancy increased slightly during the same period.
- England witnessed a slight increase in room occupancy but a marginal drop in bed occupancy when compared with April 2012.
- Room occupancy levels in Scotland had risen a single percentage point when compared with the previous year. Bed occupancy had remained static compared to April 2012.
- Northern Ireland witnessed a 6 percentage point decline in bed occupancy during April 2013, room occupancy levels were also down, falling by 9 percentage points when compared to the previous year.
- Bedspace occupancy by non-UK residents fell slightly compared with April 2012, with England mirroring the UK level. Northern Ireland saw a 2 percentage point increase during this month whilst Wales also witnessed a small increase when compared to 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: April 2011 - 2013**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	50	50	49	65	65	66	1715	1624	1542
Northern Ireland	37	42	36	48	60	51	195	182	162
Scotland	46	43	43	58	57	58	377	321	320
Wales	40	39	38	54	50	52	179	143	129
<b>UK</b>	49	48	47	63	63	64	2466	2270	2153

**Table 2: UK/Non UK Occupancy Levels April 2011 – 2013 (see note 5a and 5b Slide 19)**

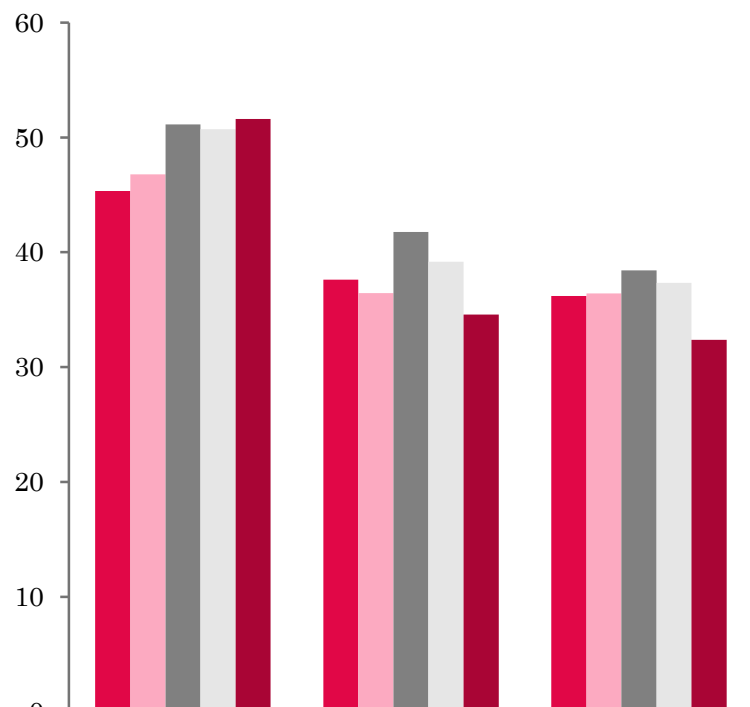
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	39	37	36	6	6	5	11	12	10	13	15	12	1715	1624	1542
Northern Ireland	23	27	19	14	15	17	31	32	41	38	36	48	195	182	162
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	377	321	320
Wales	36	35	33	2	2	3	**	**	**	6	6	7	179	143	129
<b>UK</b>	38	37	35	6	6	5	11	13	11	13	15	13	2466	2270	2153

\*\* FIGURES NOT AVAILABLE



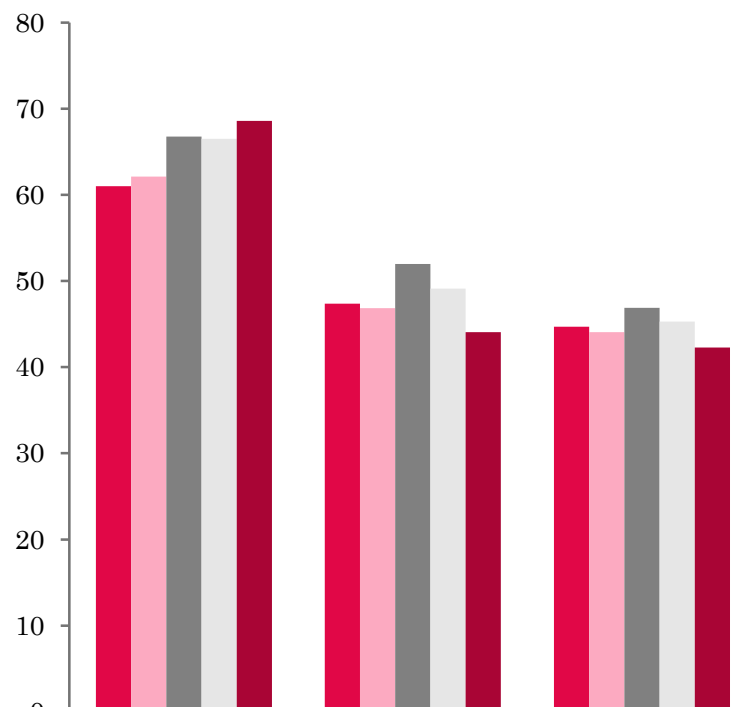


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2009-2013



	Hotels	Guesthouses	B&Bs
2009	45	38	36
2010	47	36	36
2011	51	42	38
2012	51	39	37
2013	52	35	32

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2009-2013



	Hotels	Guesthouses	B&Bs
2009	61	47	45
2010	62	47	44
2011	67	52	47
2012	67	49	45
2013	69	44	42



- Only the Hotel sector had witnessed an increase in both room and bed occupancy compared to the previous year. Both Guesthouse and B&B accommodation saw a fall in room and bed occupancy. B&B witnessing a 5 percentage points decline in bed occupancy levels compared to the previous year. (Table 3).
- Only two out of the six size band categories increased in both measures of occupancy during April 2013 compared to last year. The biggest increase in both room and bed occupancy was in the >100 size band, up by 3 pp in both bed occupancy and room occupancy compared to 2012. The biggest downturn in both room and bed occupancy was found in the 11-25 size band, both measures falling by 4 pp when compared with the previous year. (Tables 6 and 7).
- Across all location types, room occupancy either increased or remained static during April 2013 when compared to the same month the previous year with City/Large towns, Small Towns and Countryside/Village locations all witnessing a 2 pp increase on last years results. Bed occupancy was more varied, with both the Seaside and City/Large town locations increasing by 1 and 2 pp respectively. Both Small towns and Countryside/Village locations fell slightly during this period. (Table 8).
- When looking at occupancy levels by tariff, only one out of the five tariff band categories witnessed an increase in both their room and bed occupancy levels compared to April 2012. This was found in the £60+ category rising by 3 percentage points in room occupancy and 1 percentage point in bedspace occupancy. With the exception of room occupancy in the £20-£29.99 category (a rise of 3 pp), all other tariff bands witnessed a downturn in both room and bed occupancy compared to April 2012.



**Table 3: Occupancy Levels by Type of Establishment: April 2011 - 2013**

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	52	52	53	68	68	70	1039	1003	976
Northern Ireland	43	50	42	56	69	60	70	62	56
Scotland	50	48	48	64	63	65	248	216	220
Wales	45	43	45	60	57	61	90	72	64
<b>UK</b>	51	51	52	67	67	69	1447	1353	1316
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	43	41	36	54	52	46	273	241	221
Northern Ireland	19	25	32	26	37	41	17	28	21
Scotland	43	38	32	49	44	39	57	45	44
Wales	30	26	22	40	32	31	33	28	27
<b>UK</b>	42	39	35	52	49	44	380	342	313
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	41	40	34	50	48	45	403	380	345
Northern Ireland	21	16	14	28	25	23	108	91	85
Scotland	30	29	31	37	39	37	72	60	56
Wales	28	32	19	33	35	24	56	43	38
<b>UK</b>	38	37	32	47	45	42	639	574	524



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: April 2011 – 2013 (see notes 5a & 5b Slide 19)**

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2011	2012	2013	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	54	53	50	45	45	46	65	64	61	65	65	67
Northern Ireland	40	42	41	28	34	35	51	57	52	42	56	53
Scotland	50	47	47	42	41	43	58	55	55	58	58	60
Wales	47	44	42	33	34	35	58	53	51	50	48	52
<b>UK</b>	53	51	49	44	43	45	63	62	59	63	63	65



**Table 5: Non-UK Percentages: April 2011 – 2013 (see notes 5a & 5b Slide 19)**

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2011	2012	2013	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	9	11	8	13	13	12	12	14	12	15	16	14
Northern Ireland	33	32	39	36	35	36	40	36	49	42	39	47
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	5	5	7	6	9
<b>UK</b>	10	12	9	14	14	13	12	14	12	15	16	15

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: April 2011 - 2013**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	36	32	30	232	39	36	33	315	45	42	37	121
Northern Ireland	14	12	8	71	22	26	22	23	30	31	26	24
Scotland	28	25	23	48	43	37	36	62	39	45	44	56
Wales	26	20	19	34	35	35	27	41	41	39	35	20
<b>UK</b>	34	30	28	385	39	36	33	441	44	42	38	221

**Table6: Occupancy Levels by Size: April 2011 - 2013**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	50	49	52	67	50	57	52	40	54	52	54	767
Northern Ireland	35	32	25	17	40	45	43	18	49	61	49	9
Scotland	51	49	47	55	57	51	53	44	56	53	53	55
Wales	44	47	49	20	47	48	45	9	44	38	51	5
<b>UK</b>	49	49	51	159	51	55	52	111	54	51	54	836

**Table 7: Occupancy Levels by Size: April 2011 – 2013**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	43	39	38	232	50	45	44	315	56	55	50	121
Northern Ireland	19	22	15	71	29	34	28	23	44	44	39	24
Scotland	34	34	30	48	49	46	44	62	53	55	55	56
Wales	32	25	24	34	43	40	33	41	52	49	44	20
<b>UK</b>	41	37	36	375	49	45	43	441	55	54	50	221

**Table 7: Occupancy Levels by Size: April 2011 - 2013**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	63	65	67	67	68	69	69	40	72	73	76	767
Northern Ireland	48	60	41	17	57	62	61	18	59	81	54	9
Scotland	62	61	63	55	70	68	71	44	72	73	75	55
Wales	57	62	64	20	71	67	65	9	62	55	74	5
<b>UK</b>	62	64	66	159	68	69	69	111	71	72	75	836



**Table 8: Occupancy Levels by Location Types: April 2011 - 2013**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	45	41	42	214	55	56	56	586	42	43	42	331	46	45	44	411
Northern Ireland	34	37	31	39	43	50	42	47	26	28	29	47	20	17	20	29
Scotland	50	41	44	45	52	49	51	116	37	38	36	65	39	38	36	94
Wales	47	44	44	34	42	34	50	9	33	42	37	19	37	36	27	67
<b>UK</b>	46	41	42	332	54	53	55	758	41	42	41	462	44	43	41	601

**Table 8: Occupancy Levels by Location Types: April 2011 - 2013**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	58	53	53	214	71	74	74	586	58	59	61	331	57	55	57	411
Northern Ireland	44	49	40	39	56	70	62	47	34	41	41	47	28	30	24	29
Scotland	60	53	52	45	68	67	70	116	47	51	51	65	49	46	46	94
Wales	60	55	55	34	60	50	69	9	53	58	62	19	47	43	35	67
<b>UK</b>	58	53	53	332	70	71	73	758	56	57	59	462	55	52	54	601



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2011 – 2013 (see note 5a Slide 19)**

**A: Percentage of Bedspace Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	**	**	**	**	24	22	19	39	34	30	21	137
Northern Ireland	**	**	**	**	20	13	7	13	16	19	17	34
Scotland	**	**	**	**	27	30	29	18	37	30	29	60
Wales	**	**	**	**	21	14	22	7	30	35	24	41
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>24</b>	<b>22</b>	<b>20</b>	<b>77</b>	<b>34</b>	<b>30</b>	<b>22</b>	<b>272</b>

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2011 – 2013 (see note 5a Slide 19)**

**B: Percentage of Bedspace Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	44	40	38	176	48	46	38	90	51	51	52	1060
Northern Ireland	29	32	21	44	49	33	36	21	42	51	42	49
Scotland	38	37	35	39	49	44	45	35	52	50	51	168
Wales	42	34	20	20	50	47	48	15	44	42	45	46
<b>UK</b>	<b>43</b>	<b>39</b>	<b>36</b>	<b>279</b>	<b>48</b>	<b>46</b>	<b>40</b>	<b>161</b>	<b>51</b>	<b>50</b>	<b>51</b>	<b>1323</b>

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2011 – 2013 (see note 5a Slide 19)**

**A: Percentage of Bedroom Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	**	**	**	**	34	32	36	39	43	38	30	137
Northern Ireland	**	**	**	**	22	26	14	13	24	29	22	34
Scotland	**	**	**	**	34	45	37	18	47	43	39	60
Wales	**	**	**	**	29	18	35	7	40	43	31	41
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>33</b>	<b>33</b>	<b>36</b>	<b>77</b>	<b>43</b>	<b>39</b>	<b>31</b>	<b>272</b>

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2011 – 2013 (see note 5a Slide 19)**

**B: Percentage of Bedroom Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	52	50	46	176	57	57	46	90	68	68	70	1060
Northern Ireland	46	45	25	44	57	43	56	21	54	70	60	49
Scotland	47	47	47	39	61	56	58	35	66	61	68	168
Wales	52	44	36	20	61	57	57	15	60	57	61	46
<b>UK</b>	<b>51</b>	<b>49</b>	<b>45</b>	<b>279</b>	<b>58</b>	<b>57</b>	<b>49</b>	<b>161</b>	<b>67</b>	<b>66</b>	<b>69</b>	<b>1323</b>

**\*\* 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 2012 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 June 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.



## 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 2012) 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)

