



# UNITED KINGDOM OCCUPANCY SURVEY

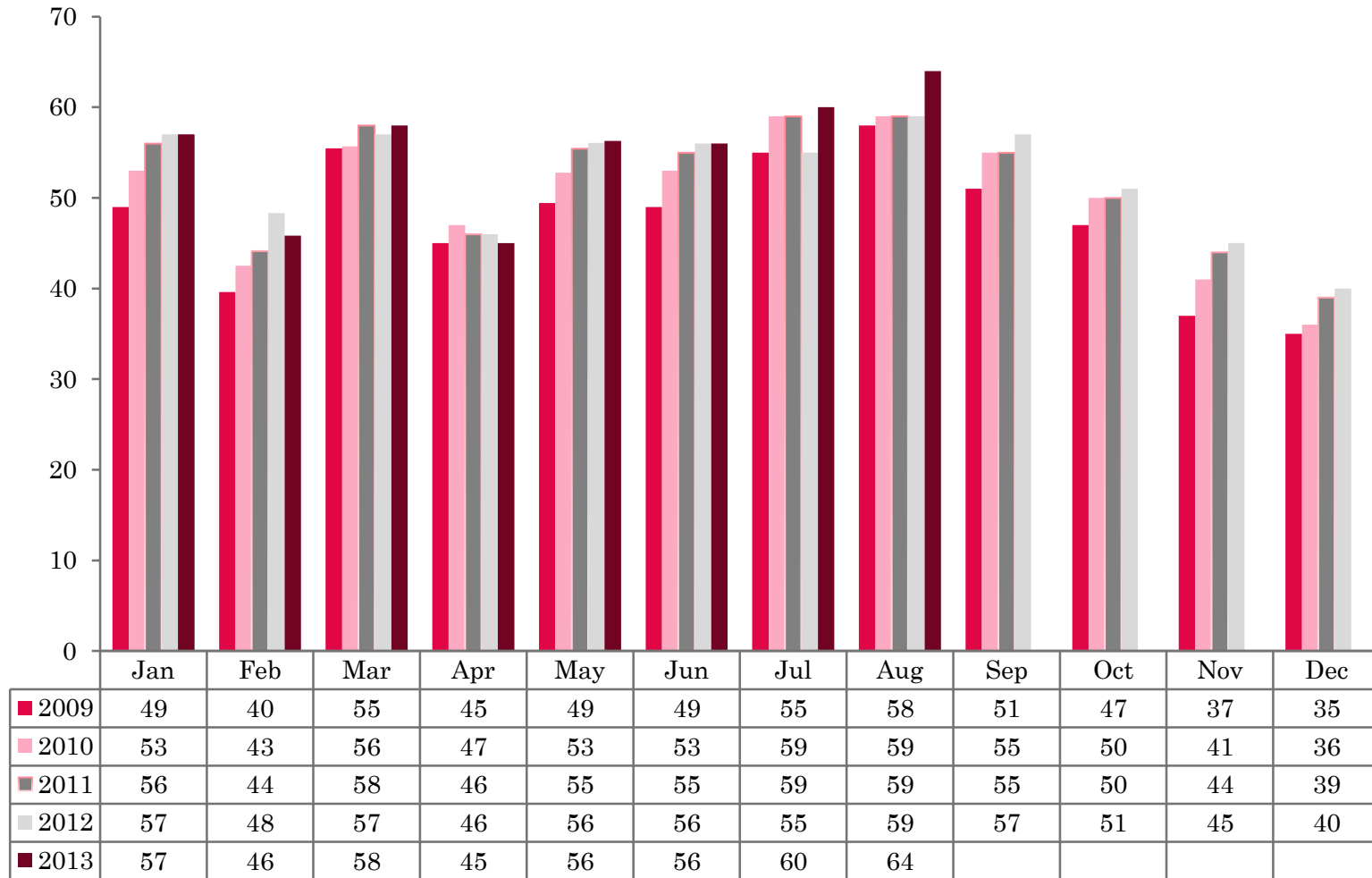
Serviced Accommodation Summary Report  
August 2013

# UK OCCUPANCY SURVEY

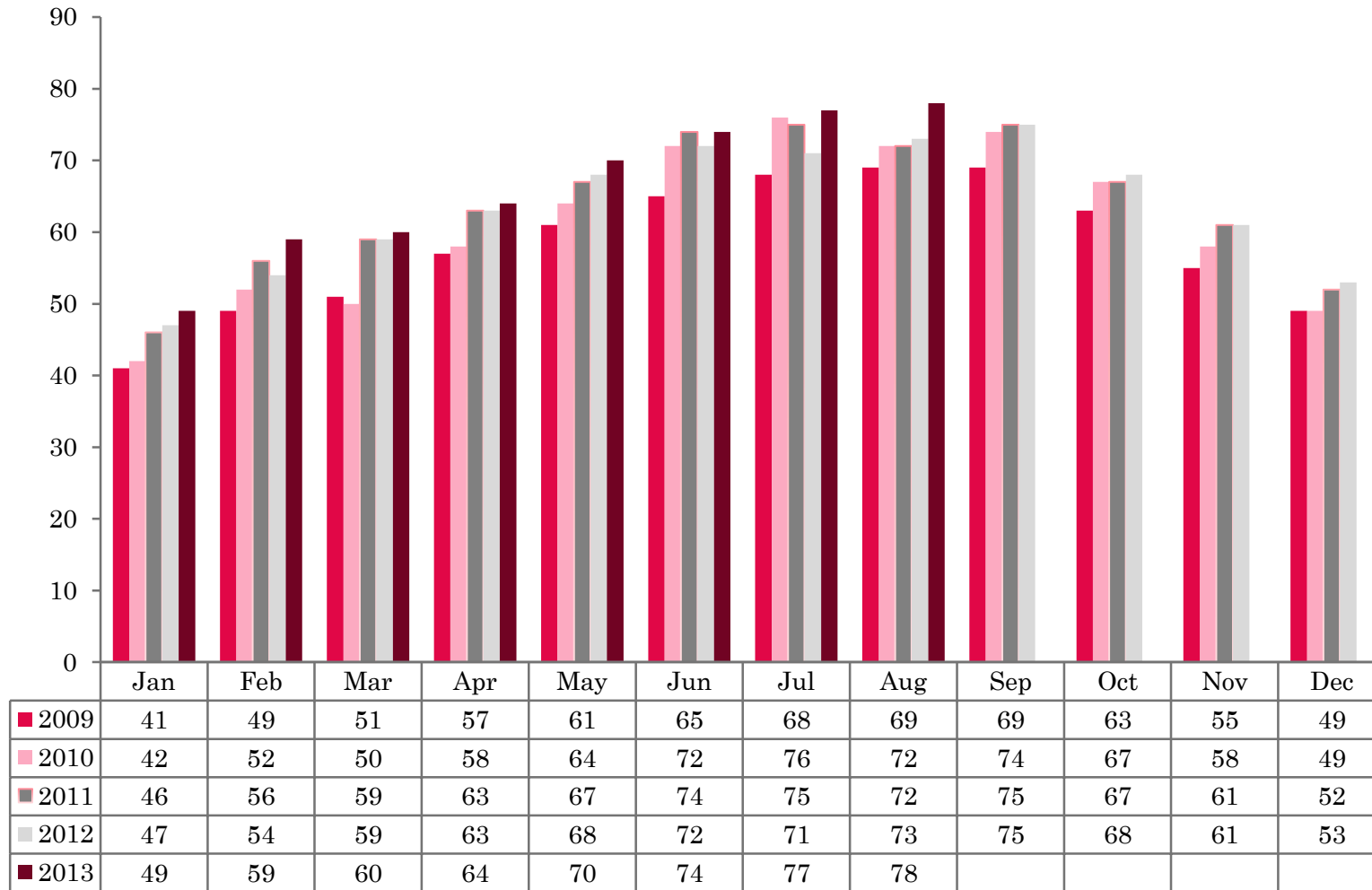
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2009 - 2013



# UK BEDROOM OCCUPANCY 2009 - 2013

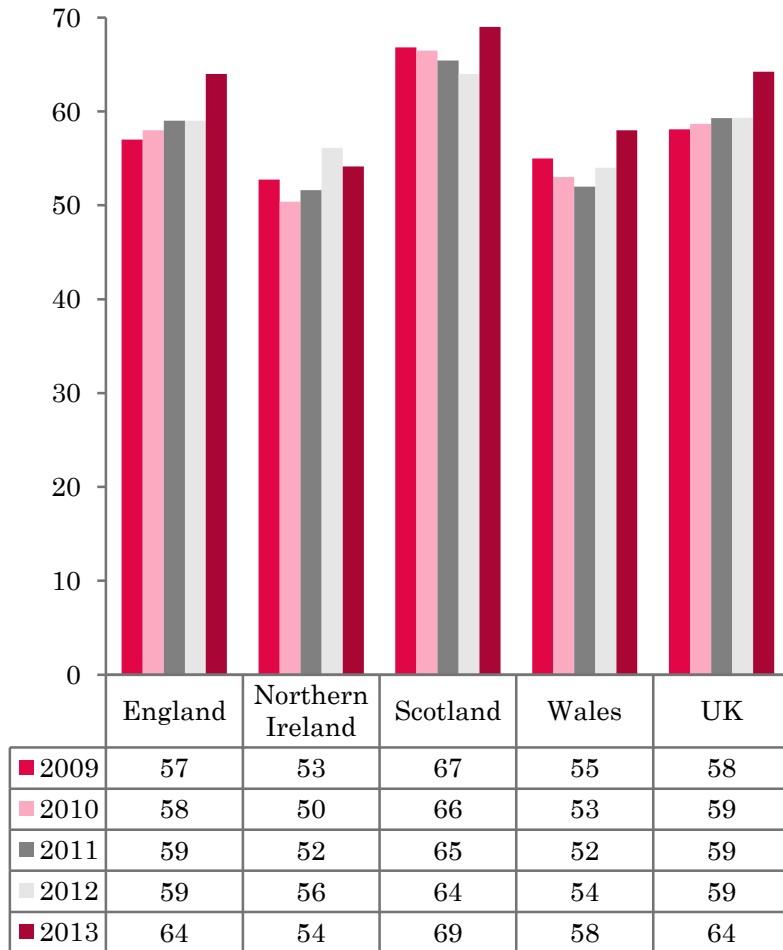


❖ 2,647 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

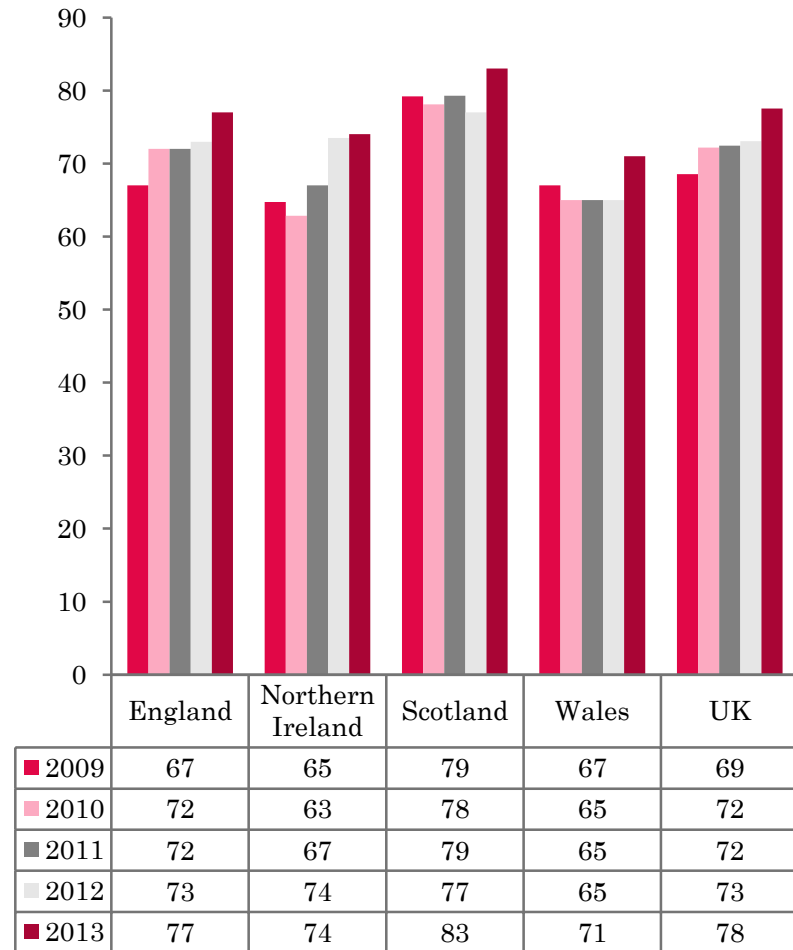
❖ Both UK bedspace occupancy (64%) and UK bedroom occupancy (78%) were at their highest levels since 2009. Both measures of occupancy had risen by 5 percentage points, when compared with the same period in August 2012.



## NATIONAL BEDSPACE OCCUPANCY AUGUST 2009-2013



## NATIONAL ROOM OCCUPANCY AUGUST 2009-2013



- Bedspace occupancy varied from 64% in England to 54% in Northern Ireland during August 2013.
- In the UK during August 2013, both bedspace and room occupancy levels increased by 5 percentage points respectively when compared to with the same period the previous year.
- Bedspace occupancy in Wales saw an increase of 4 percentage points, with room occupancy also showing an increase of 6 percentage points in comparison to August 2012 data.
- England mirrored the UK in bedspace occupancy in August 2013, with an increase of 5 percentage points. A 4 percentage point rise in room occupancy was found when compared to the previous year.
- When compared with August 2012, Scotland had increased in both measures of room and bedspace occupancy by 6 and 5 percentage points respectively.
- Bed occupancy in Northern Ireland fell by 2 percentage points during August 2013, with room occupancy remaining static when compared to 2012.
- Bedspace occupancy by non-UK residents increased slightly compared with August 2012, with England mirroring the UK level. Northern Ireland remained static compared with the previous year with Wales witnessing a slight increase (up 1 percentage point). (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: August 2011 - 2013**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	59	59	64	72	73	77	1715	1587	2013
Northern Ireland	52	56	54	67	74	74	177	168	183
Scotland	65	64	69	79	77	83	372	319	314
Wales	52	54	58	65	65	71	178	144	137
<b>UK</b>	59	59	64	72	73	78	2442	2218	2647

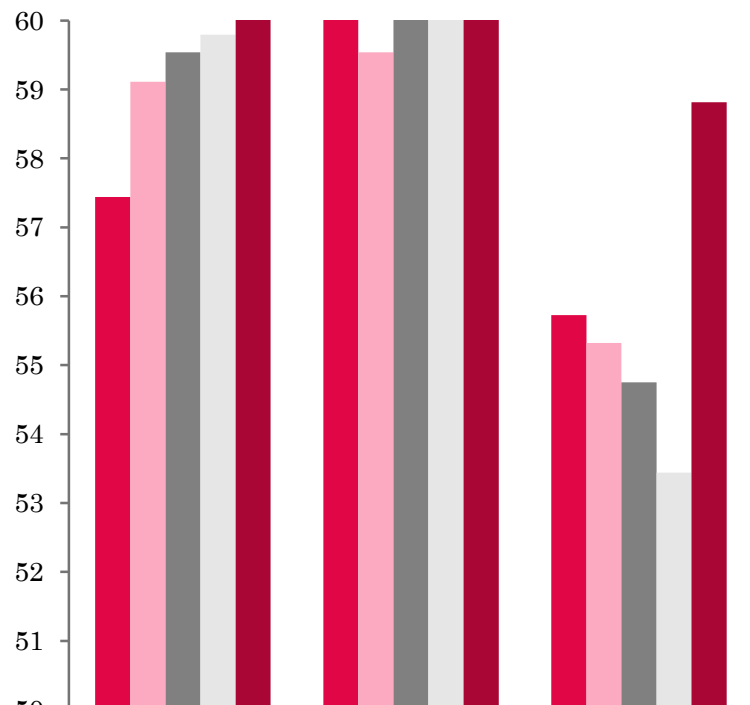
**Table 2: UK/Non UK Occupancy Levels August 2011 – 2013 (see note 5a and 5b Slide 19)**

	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	51	52	54	8	8	9	13	9	14	14	13	14	1715	1587	2013
Northern Ireland	30	30	28	22	26	26	35	35	49	42	47	48	177	168	183
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	372	319	314
Wales	49	50	54	4	5	6	**	**	**	8	9	10	178	144	137
<b>UK</b>	50	51	53	8	8	9	13	10	15	14	13	15	2442	2218	2647

\*\* FIGURES NOT AVAILABLE

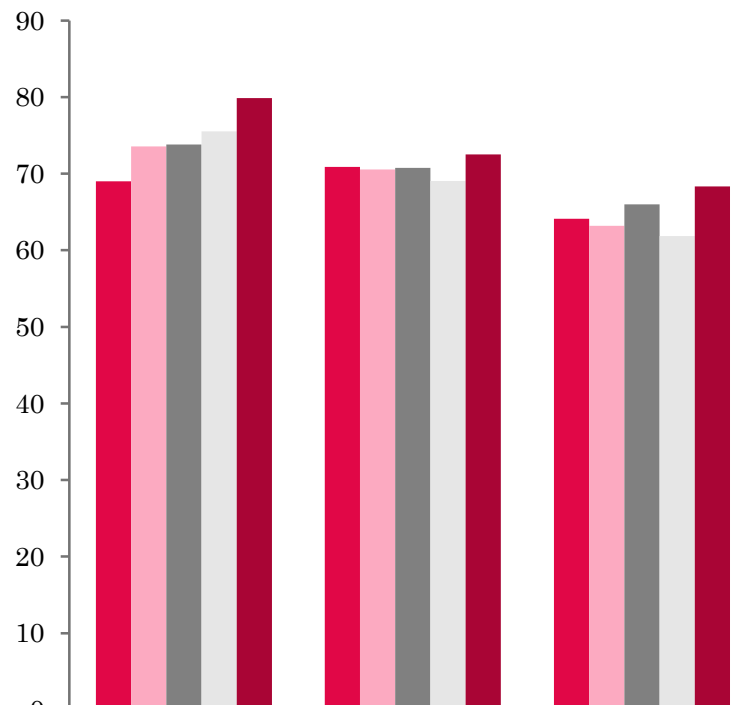


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION AUGUST 2009-2013



	Hotels	Guesthouses	B&Bs
2009	57	62	56
2010	59	60	55
2011	60	62	55
2012	60	61	53
2013	65	63	59

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



	Hotels	Guesthouses	B&Bs
2009	69	71	64
2010	74	71	63
2011	74	71	66
2012	76	69	62
2013	80	73	68



- Both room and bed occupancy levels increased across all accommodation sectors in August 2013 compared with the previous year. The biggest increase in bedspace and room occupancy was found in the B&B sector where a 6 percentage point increase on 2012 was found. Hotels also fared well with a 5 pp rise in bedspace occupancy and 4 pp in room occupancy when compared with the previous year (Table 3).
- Across all size bandings, results were higher than that of the previous year. The biggest increase in bedspace occupancy was found in both the 1-3 and 26-50 categories where occupancy rose by 6 percentage points respectively when compared to August 2012. Room occupancy in the 11-25 size band category saw the biggest rise (7 percentage points), when compared with the previous year. (Tables 6 and 7).
- Similarly, all location types had seen an increase in both room and bed occupancy compared to the previous years results. The largest increase in bed occupancy was found in the seaside category, where bedspace occupancy had risen significantly, by 14 pp, compared with August 2012. Countryside locations witnessed the biggest rise in room occupancy, rising by 7 percentage points compared with the same period in August 2012. (Table 8).
- When looking at occupancy levels by tariff, all tariff bands had increased their room and bed occupancy levels when compared with the previous year. In terms of bed occupancy, the biggest of these increases was found in the £50-£59 category where levels rose by 5 percentage points compared to August 2012. Both the £30-£39 and £40-£49 tariff bands saw increases in room occupancy, both rising by 6 percentage points compared to the same period the previous year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	59	59	65	73	75	79	1041	987	1483
Northern Ireland	56	61	59	73	81	82	72	60	78
Scotland	66	65	69	82	80	85	239	210	213
Wales	53	57	61	67	70	77	90	71	72
UK	60	60	65	74	76	80	1442	1328	1846
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	62	61	63	71	69	73	260	231	207
Northern Ireland	25	59	47	45	70	61	18	14	15
Scotland	68	66	70	78	75	78	59	50	44
Wales	53	47	47	61	57	54	30	29	26
UK	62	61	63	71	69	73	367	324	292
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	55	54	58	67	63	68	414	369	323
Northern Ireland	45	34	34	52	46	44	87	93	90
Scotland	58	59	68	68	66	75	74	59	57
Wales	46	41	54	54	45	64	58	44	39
UK	55	53	59	66	62	68	633	565	509



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: August 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	64	64	67	55	54	58	74	74	78	72	71	76
Northern Ireland	57	59	62	46	50	53	71	75	79	64	70	75
Scotland	69	67	71	63	61	66	79	77	82	79	78	84
Wales	59	60	64	48	49	53	68	68	74	63	63	70
<b>UK</b>	64	64	67	55	55	59	74	74	78	72	71	77



**Table 5: Non-UK Percentages: August 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	11	10	11	15	13	16	13	14	14	15	15	18
Northern Ireland	34	34	50	39	39	56	42	49	49	46	52	52
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	7	9	9	9	9	10
<b>UK</b>	12	11	12	16	14	17	13	14	15	15	15	18

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: August 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	51	48	53	218	60	58	61	298	56	56	62	116
Northern Ireland	27	26	31	76	51	53	45	23	37	47	47	28
Scotland	56	57	66	49	68	64	70	64	65	65	68	50
Wales	41	40	51	35	56	51	56	41	58	53	52	25
<b>UK</b>	51	48	54	378	61	58	62	426	57	57	62	219

**Table6: Occupancy Levels by Size: August 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	57	61	69	68	64	65	67	37	57	58	61	1276
Northern Ireland	43	55	39	22	56	62	60	24	62	66	68	10
Scotland	67	68	69	56	70	66	70	40	66	65	68	55
Wales	52	57	63	19	51	59	67	10	46	56	56	7
<b>UK</b>	58	62	68	165	64	65	67	111	58	59	62	1348



**Table 7: Occupancy Levels by Size: August 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	59	56	61	218	69	66	71	298	67	66	73	116
Northern Ireland	36	40	41	76	56	61	55	23	60	67	64	28
Scotland	65	63	74	49	77	73	78	64	76	77	81	50
Wales	50	42	60	35	64	61	64	41	67	63	63	25
<b>UK</b>	59	56	62	375	69	67	71	426	68	67	74	219

**Table 7: Occupancy Levels by Size: August 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	69	73	80	68	75	77	78	37	76	77	80	1276
Northern Ireland	65	73	69	22	71	79	82	24	79	88	90	10
Scotland	81	82	85	56	85	81	86	40	88	85	91	55
Wales	66	70	77	19	71	79	81	10	65	69	83	7
<b>UK</b>	70	74	80	165	76	78	79	111	77	78	82	1348



**Table 8: Occupancy Levels by Location Types: August 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	68	60	76	252	58	58	64	755	53	52	56	443	58	60	65	563
Northern Ireland	58	58	58	46	54	63	58	60	42	36	41	50	32	34	38	27
Scotland	69	67	73	38	67	66	70	121	57	55	59	63	66	65	71	92
Wales	64	63	70	35	41	49	55	12	46	48	55	20	52	52	51	70
<b>UK</b>	68	61	75	371	58	59	64	948	53	52	56	576	58	60	65	752

**Table 8: Occupancy Levels by Location Types: August 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	74	73	79	252	72	75	81	755	68	71	73	443	69	69	76	563
Northern Ireland	72	77	75	46	73	81	81	60	47	54	55	50	43	41	47	27
Scotland	82	79	84	38	87	83	88	121	68	67	76	63	75	74	80	92
Wales	75	73	81	35	60	65	78	12	64	68	70	20	61	58	61	70
<b>UK</b>	75	74	80	371	73	76	82	948	67	70	73	576	69	68	75	752



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	**	**	**	**	44	48	51	34	54	50	52	130
Northern Ireland	**	**	**	**	38	28	37	20	43	44	38	45
Scotland	**	**	**	**	53	49	49	13	62	59	65	59
Wales	**	**	**	**	34	29	39	7	51	46	49	40
<b>UK</b>	**	**	**	**	44	46	50	74	55	51	54	274

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	60	61	65	168	58	57	61	85	59	59	63	1559
Northern Ireland	42	54	43	33	57	56	52	26	56	61	61	59
Scotland	69	64	68	36	63	63	74	34	68	67	71	172
Wales	55	51	45	24	50	62	59	15	53	58	66	51
<b>UK</b>	61	61	64	261	58	58	63	160	60	60	64	1841

\*\* FIGURES NOT AVAILABLE

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

<b>A: Percentage of Bedroom Occupancy</b>												
	<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	**	**	**	**	54	58	62	34	64	59	64	130
Northern Ireland	**	**	**	**	45	47	48	20	53	51	56	45
Scotland	**	**	**	**	62	56	59	13	73	70	77	59
Wales	**	**	**	**	44	35	45	7	59	55	59	40
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>54</b>	<b>56</b>	<b>60</b>	<b>74</b>	<b>65</b>	<b>60</b>	<b>66</b>	<b>274</b>

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

<b>B: Percentage of Bedroom Occupancy</b>												
	<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	69	70	76	168	70	68	70	85	74	74	79	1559
Northern Ireland	60	69	67	33	66	68	66	26	73	82	83	59
Scotland	79	75	79	36	78	78	88	34	83	81	86	172
Wales	68	61	64	24	60	70	67	15	68	71	81	51
<b>UK</b>	<b>70</b>	<b>70</b>	<b>76</b>	<b>261</b>	<b>70</b>	<b>70</b>	<b>72</b>	<b>160</b>	<b>75</b>	<b>75</b>	<b>80</b>	<b>1841</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 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 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)

