



UNITED KINGDOM OCCUPANCY SURVEY

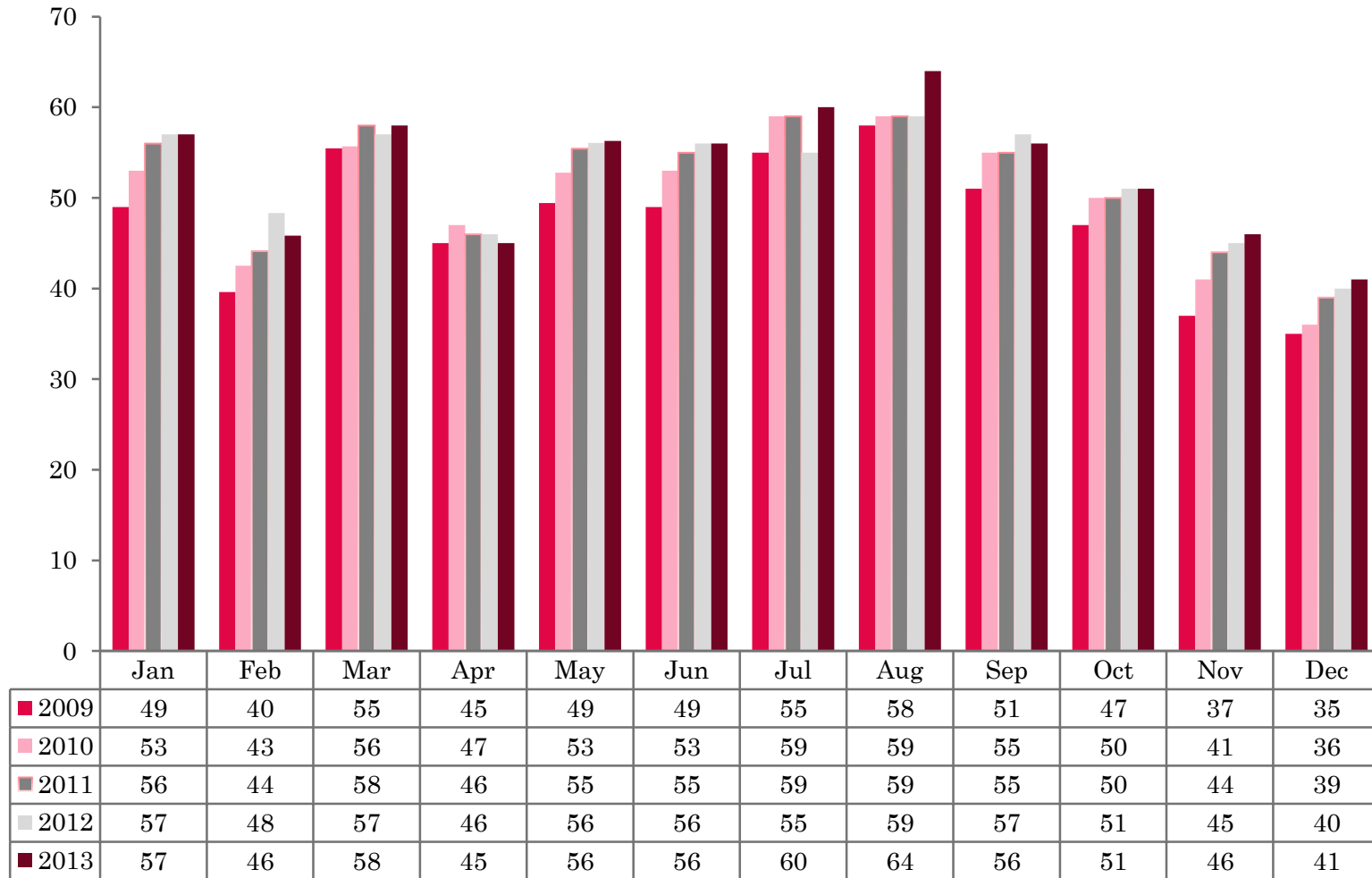
Serviced Accommodation Summary Report
December 2013

UK OCCUPANCY SURVEY

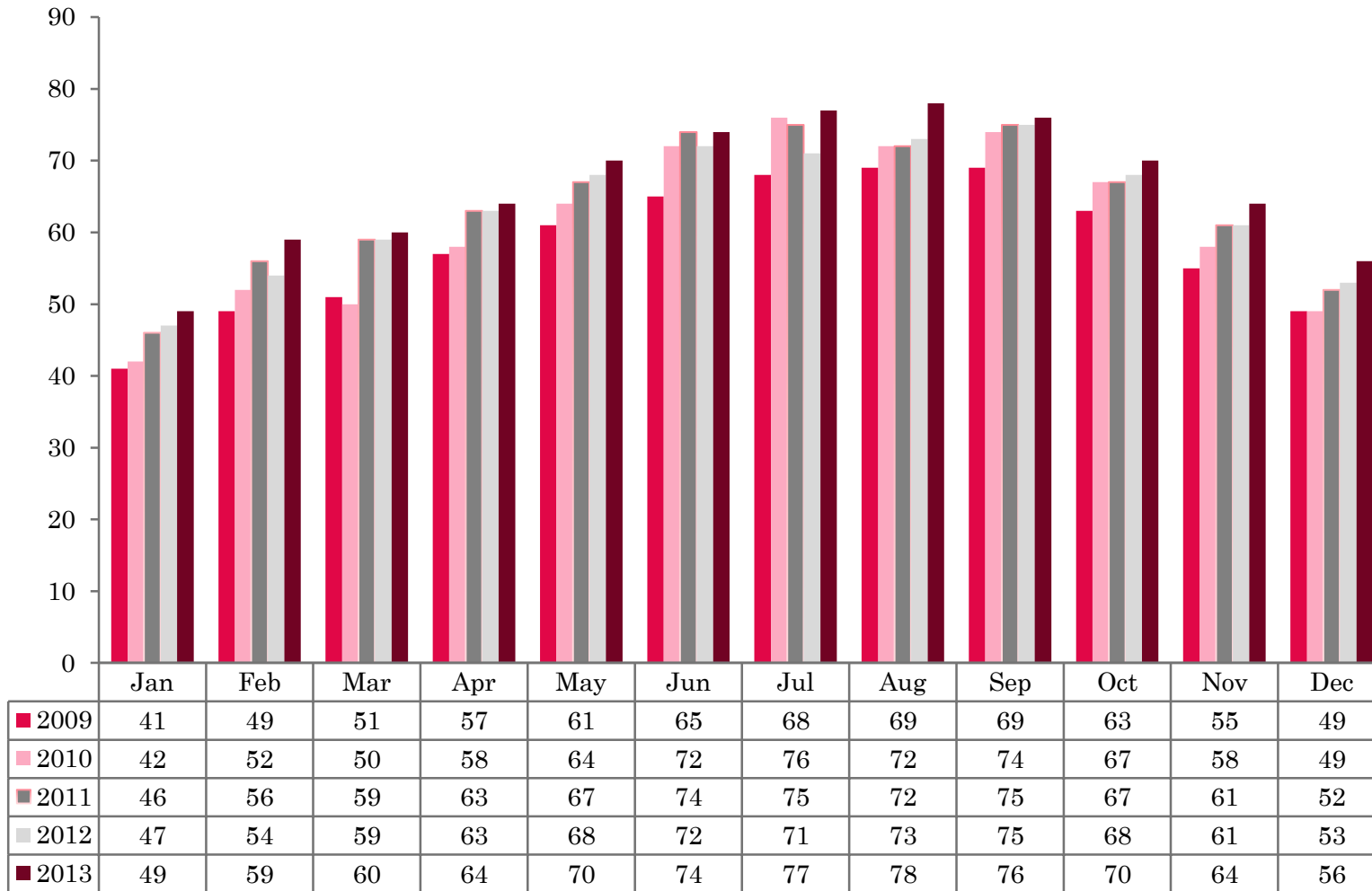
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2009 - 2013



UK BEDROOM OCCUPANCY 2009 - 2013

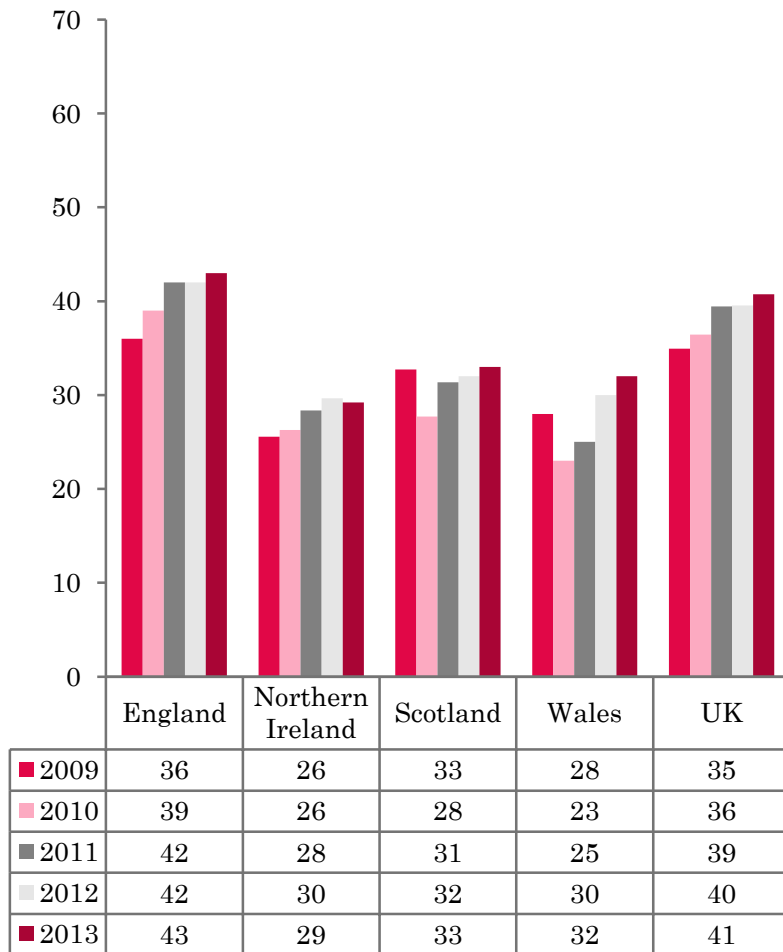


❖ 2,442 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

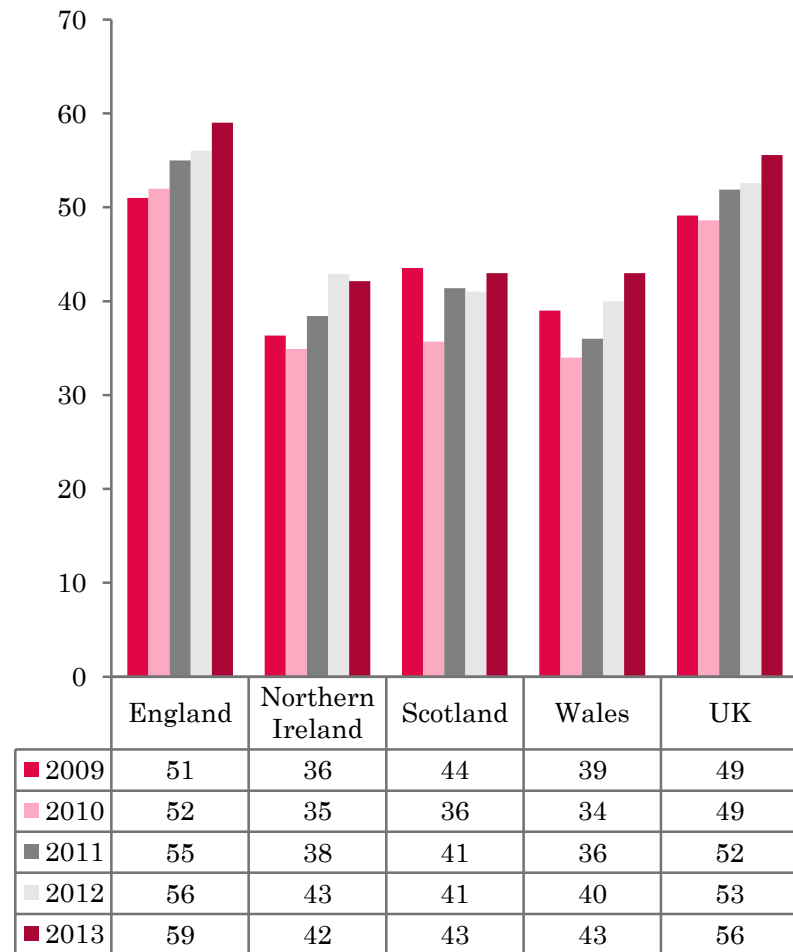
❖ UK bedspace occupancy (41%) had remained flat when compared to December 2012. Room occupancy (56%) rose by 3 percentage points reaching its highest level in December over the last 5 years.



NATIONAL BEDSPACE OCCUPANCY DECEMBER 2009-2013



NATIONAL ROOM OCCUPANCY DECEMBER 2009-2013



- Bedspace occupancy varied from 43% in England to 29% in Northern Ireland during December 2013.
- In the UK during December 2013, bedspace occupancy remained fairly constant when compared with the previous year, whilst bedroom occupancy increased, up 3 percentage points on December 2012.
- Both room and bedspace occupancy in Wales increased in December 2013 compared to the same month the previous year. Bed occupancy was up 2 points and room occupancy up 3 points when compared to December 2012.
- England mirrored the UK in bedspace and room occupancy in December 2013 with bed occupancy remaining flat (+1%), and room up by 3 percentage points.
- There was no change in bedspace occupancy for Scotland (+1%) with room occupancy levels increasing on last years results (up 2 pp's). Both room and bedspace occupancy in Northern Ireland fell (-1%) when compared with December 2012.
- Across the UK as a whole, bedspace occupancy by non-UK residents remained static when compared with December 2012. England mirrored the UK, whilst Northern Ireland witnessed the biggest increase of 3 percentage points. Wales also increased slightly when compared 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: December 2011 - 2013

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	42	42	43	55	56	59	1597	1511	1905
Northern Ireland	28	30	29	38	43	42	159	139	163
Scotland	31	32	33	41	41	43	288	287	268
Wales	25	30	32	36	40	43	137	108	106
UK	39	40	41	52	53	56	2181	2045	2442

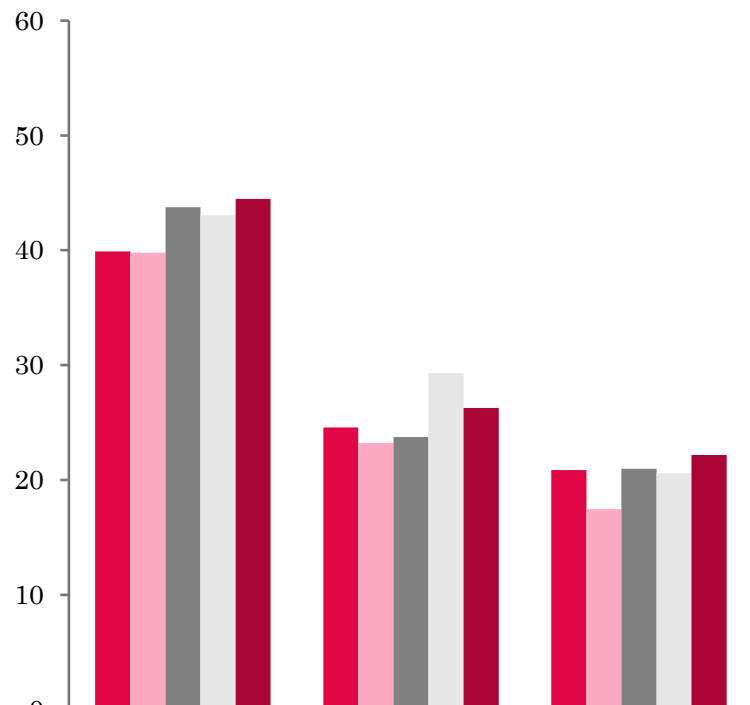
Table 2: UK/Non UK Occupancy Levels December 2011 – 2013 (see note 5a and 5b Slide 19)

	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	31	30	28	4	5	5	8	9	10	12	14	15	1597	1511	1905
Northern Ireland	18	19	15	11	11	14	33	27	48	37	36	49	159	139	163
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	288	287	268
Wales	22	25	30	1	1	2	**	**	**	3	4	6	137	108	106
UK	30	29	28	4	5	5	9	9	11	12	14	15	2181	2045	2442

** FIGURES NOT AVAILABLE

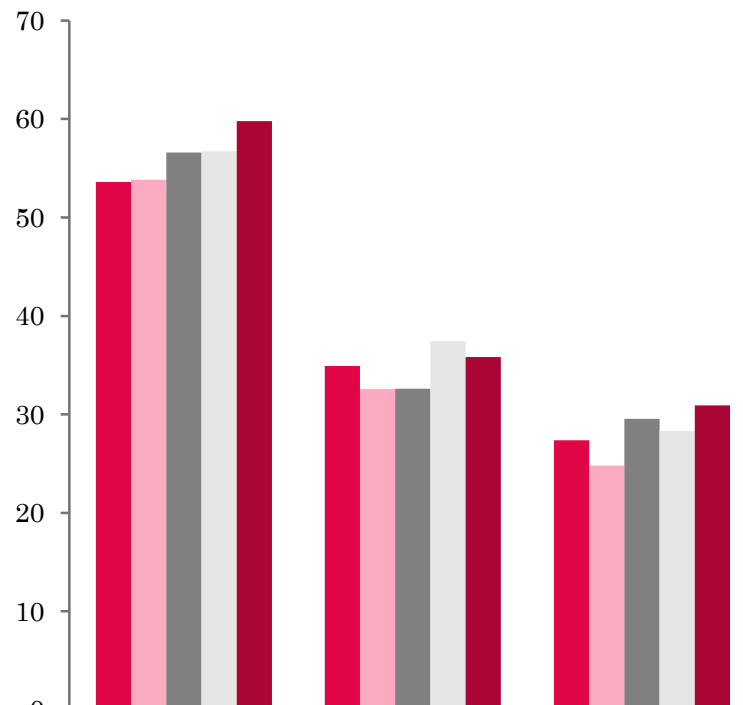


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2009-2013



	Hotels	Guesthouses	B&Bs
2009	40	25	21
2010	40	23	17
2011	44	24	21
2012	43	29	21
2013	44	26	22

UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2009-2013



	Hotels	Guesthouses	B&Bs
2009	54	35	27
2010	54	33	25
2011	57	33	30
2012	57	37	28
2013	60	36	31



- There was very little change year on year across the accommodation sectors during December 2013. Both Hotels and B&B saw an increase in bedroom occupancy of 3 percentage points respectively with bedspace occupancy remaining flat for both types of accommodation. Guesthouse accommodation witnessed a slight downturn in both measures of occupancy (Table 3).
- Bedspace occupancy in four out of the six size bandings were higher than in December 2012. The biggest increase was found in the 11-25 size banding where bedspace occupancy levels rose by 3 percentage points when compared to the previous year. The remaining size bandings either increased slightly or remained static with the previous year's results. Room occupancy in five out of the six size bandings witnessed an increase when compared to the previous year. The 11-25 category saw the biggest increase, up 5 percentage points on December 2012. Both the 26-50 and 100+ increased by 3 percentage points compared with the previous year, with the 1-3 and 4-10 size band categories also increasing during this month. The 51-100 category was the only size band to witness a fall in occupancy levels (Tables 6 and 7).
- Both room and bed occupancy levels increased across nearly all locations when compared with the same period in 2012. The exception being bedspace occupancy in the Seaside category where levels fell by 2 percentage points. All other categories increased by 2 percentage points in bedspace occupancy. City/large town saw the highest increase in room occupancy, rising by 5 percentage points in December 2013. As with bedspace occupancy, all other locations saw an increase in room occupancy levels, up by 2 percentage points, when compared to December 2012 (Table 8).
- Across all tariff bands both room and bedspace occupancy either increased or remained on a par with December 2012. The biggest increase in both measures of occupancy was found in the 50-59 tariff band, where bed occupancy levels increased by 5 percentage points and room occupancy by 8 percentage points. All other categories increased slightly apart from bedspace occupancy in the 30-39 category and room occupancy in the 40-49 category which remained static during this period.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	46	45	46	59	59	62	1026	986	1466
Northern Ireland	34	34	35	47	49	50	67	52	72
Scotland	37	37	40	49	49	52	211	214	205
Wales	31	36	37	44	49	51	77	60	58
UK	44	43	44	57	57	60	1381	1312	1801
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	26	33	29	36	42	40	218	199	170
Northern Ireland	14	38	18	20	46	28	13	8	16
Scotland	17	17	16	21	22	19	39	34	29
Wales	11	10	16	15	15	21	25	22	21
UK	24	29	26	33	37	36	295	263	236
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	23	23	25	33	32	35	353	326	269
Northern Ireland	10	11	7	13	18	13	79	7	73
Scotland	15	14	11	19	17	15	38	39	34
Wales	10	10	16	11	13	19	35	26	27
UK	21	21	22	30	28	31	505	398	403



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: December 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	46	44	45	39	39	42	55	53	55	56	57	60
Northern Ireland	31	34	35	21	24	25	41	42	45	33	36	40
Scotland	37	35	36	28	29	31	43	40	42	40	42	44
Wales	30	32	32	21	26	31	39	39	43	35	40	42
UK	44	42	43	36	36	39	52	50	52	52	53	56



Table 5: Non-UK Percentages: December 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	7	8	10	10	9	11	12	17	15	13	17	16
Northern Ireland	33	25	32	37	28	38	44	35	40	48	39	43
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	4	5	4	3	6
UK	8	8	11	11	10	12	12	16	15	13	16	16

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Table 6: Occupancy Levels by Size: December 2011 - 2013

A: Percentage of Bedspace Occupancy												
	1 - 3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	18	19	19	171	23	24	25	248	32	32	35	105
Northern Ireland	5	5	6	64	15	24	11	18	19	20	18	29
Scotland	12	11	10	31	16	18	20	42	28	30	30	43
Wales	8	10	14	22	15	15	19	32	27	27	30	19
UK	16	17	17	288	22	23	24	340	31	31	34	196

Table6: Occupancy Levels by Size: December 2011 - 2013

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	38	41	44	61	50	47	45	38	47	47	48	1282
Northern Ireland	21	31	24	20	29	32	37	23	44	39	42	9
Scotland	31	33	34	55	46	43	47	40	44	46	48	57
Wales	36	42	33	21	30	35	37	8	30	42	****	4
UK	37	40	42	157	48	45	45	109	46	46	48	1352



Table 7: Occupancy Levels by Size: December 2011 – 2013

B:Percentage of Bedroom Occupancy												
	1 -3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	25	24	25	171	32	32	34	248	45	45	51	105
Northern Ireland	10	8	11	64	16	33	19	18	31	29	28	29
Scotland	16	14	14	31	22	24	24	42	36	38	37	43
Wales	10	13	17	22	20	19	24	32	37	37	40	19
UK	23	22	23	375	30	30	32	340	43	43	48	196

Table 7: Occupancy Levels by Size: December 2011 - 2013

B (cont): Percentage of Bedroom Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	49	54	58	61	60	59	56	38	64	65	68	1282
Northern Ireland	37	43	39	20	44	45	50	23	53	57	58	9
Scotland	42	44	47	55	58	54	61	40	59	62	63	57
Wales	49	55	44	21	45	54	50	8	47	54	****	4
UK	48	52	55	157	59	58	56	109	62	64	67	1352



Table 8: Occupancy Levels by Location Types: December 2011 - 2013

A: Percentage Bedspace Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	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	33	33	31	172	49	50	52	1006	35	35	37	388	35	34	36	339
Northern Ireland	16	25	19	36	35	35	38	56	19	20	19	45	17	13	9	26
Scotland	26	27	24	24	41	42	46	119	20	21	20	57	28	22	22	68
Wales	29	34	33	29	31	42	44	9	23	25	24	15	19	18	24	53
UK	32	32	30	261	47	48	50	1190	32	32	34	505	33	31	33	486

Table 8: Occupancy Levels by Location Types: December 2011 - 2013

B:Percentage Bedroom Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	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	41	43	46	172	63	64	69	1006	49	51	54	388	46	45	48	339
Northern Ireland	20	34	25	36	47	52	53	56	25	27	27	45	25	20	16	26
Scotland	35	32	31	24	55	55	61	119	28	32	31	57	33	28	27	68
Wales	38	44	41	29	48	55	64	9	36	38	35	15	24	25	30	53
UK	40	41	43	261	61	62	67	1190	45	47	49	505	43	41	43	486

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

A: Percentage of Bedspace Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	**	**	**	**	17	19	21	24	19	15	16	101
Northern Ireland	**	**	**	**	14	11	10	23	8	7	6	34
Scotland	**	**	**	**	16	13	12	12	13	17	12	36
Wales	**	**	**	**	6	14	4	5	12	13	18	25
UK	**	**	**	**	16	18	19	64	18	15	15	196

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

B: Percentage of Bedspace Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	25	26	26	135	30	30	36	78	45	45	46	290
Northern Ireland	18	20	19	29	23	21	40	26	36	35	32	51
Scotland	21	17	21	29	34	30	36	32	40	43	41	159
Wales	20	15	22	17	34	30	24	16	30	37	40	43
UK	24	24	25	210	31	30	35	152	43	44	45	543

** FIGURES NOT AVAILABLE

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

A: Percentage of Bedroom Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	**	**	**	**	27	32	37	24	27	22	25	101
Northern Ireland	**	**	**	**	19	23	14	23	12	11	9	34
Scotland	**	**	**	**	18	16	15	12	22	25	19	36
Wales	**	**	**	**	9	17	7	5	17	19	24	25
UK	**	**	**	**	25	29	32	64	25	22	24	196

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

B: Percentage of Bedroom Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	33	35	33	135	40	38	46	78	59	60	62	290
Northern Ireland	27	27	27	29	29	30	54	26	49	51	48	51
Scotland	30	26	32	29	45	41	49	32	51	54	53	159
Wales	25	22	31	17	43	39	30	16	43	50	54	43
UK	32	33	33	210	41	38	46	152	57	58	60	543

** 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)

