



UNITED KINGDOM OCCUPANCY SURVEY

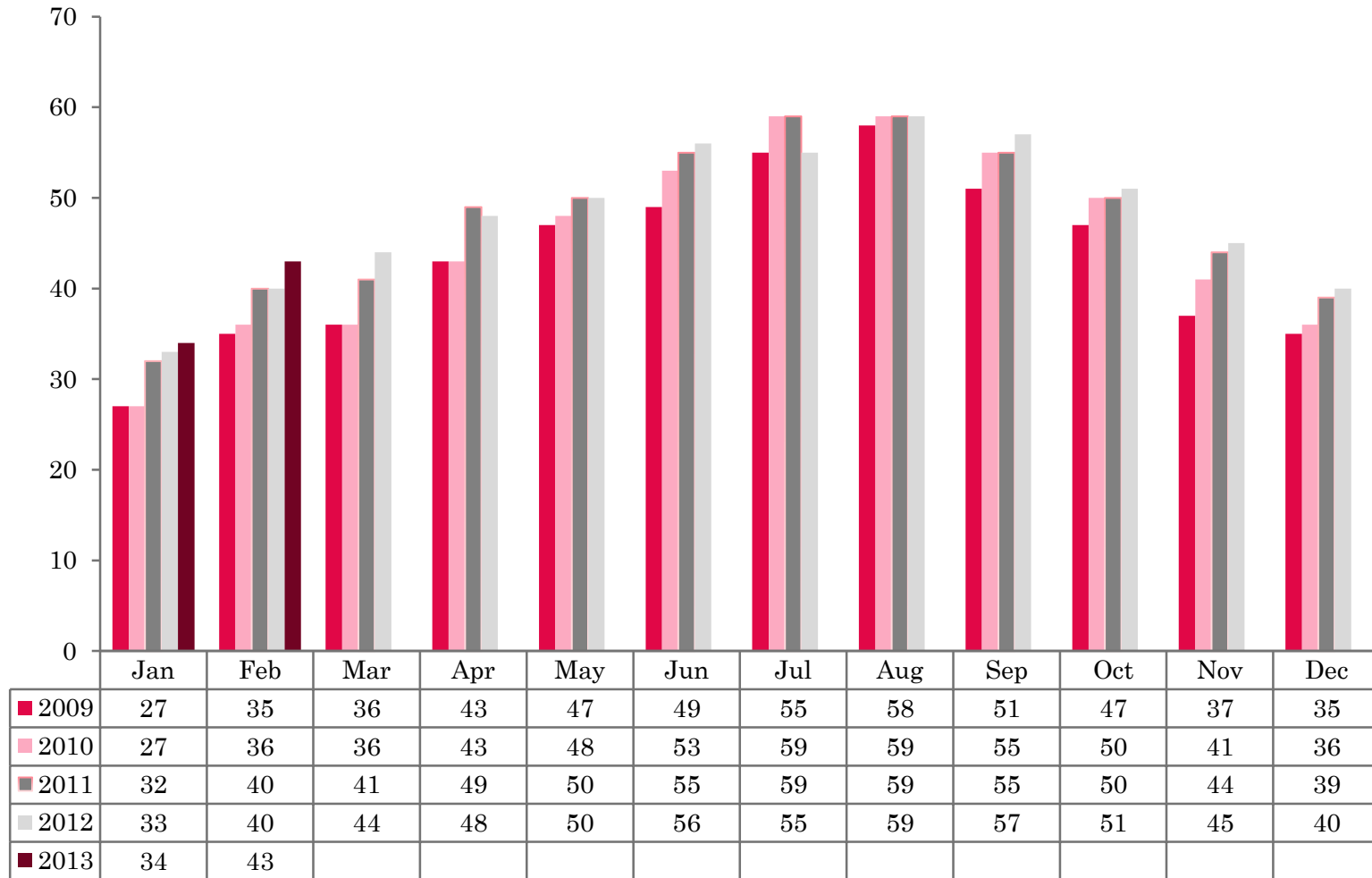
Serviced Accommodation Summary Report
February 2013

UK OCCUPANCY SURVEY

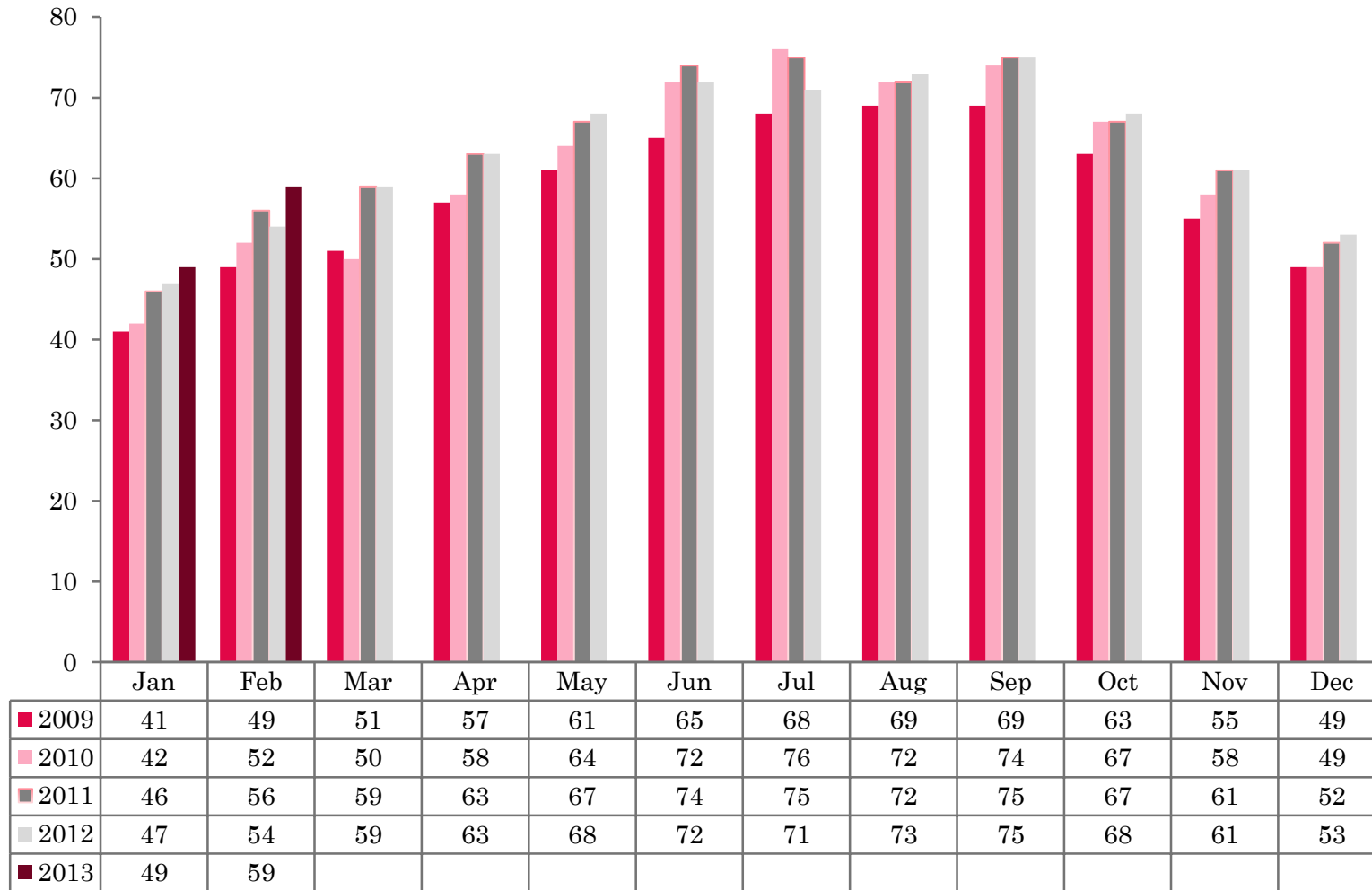
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2009 - 2013



UK BEDROOM OCCUPANCY 2009 - 2013



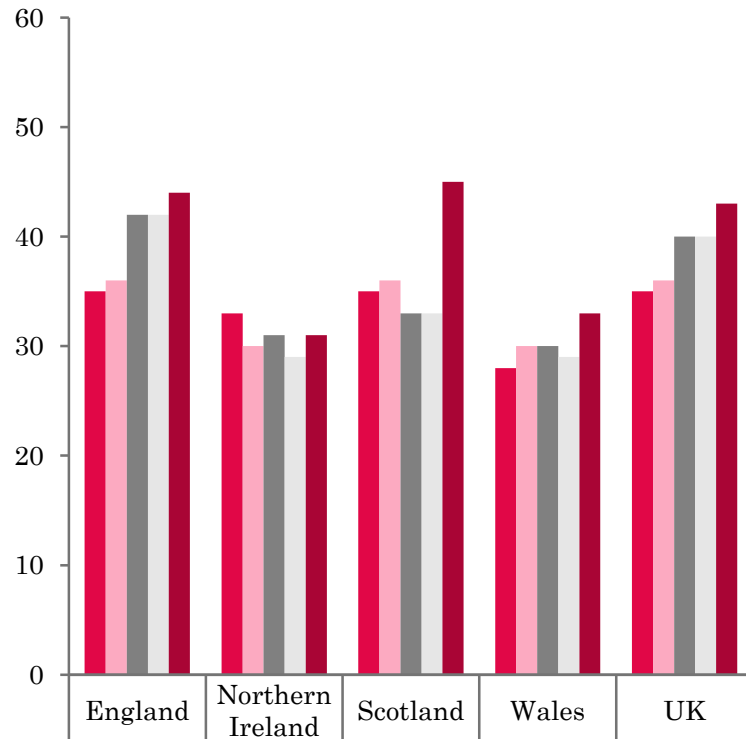
- ❖ 2,032 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).



- ❖ UK bedspace occupancy (43%) and UK bedroom occupancy (59%) had risen by 3 and 5 percentage points respectively, when compared with the same period in February 2012.

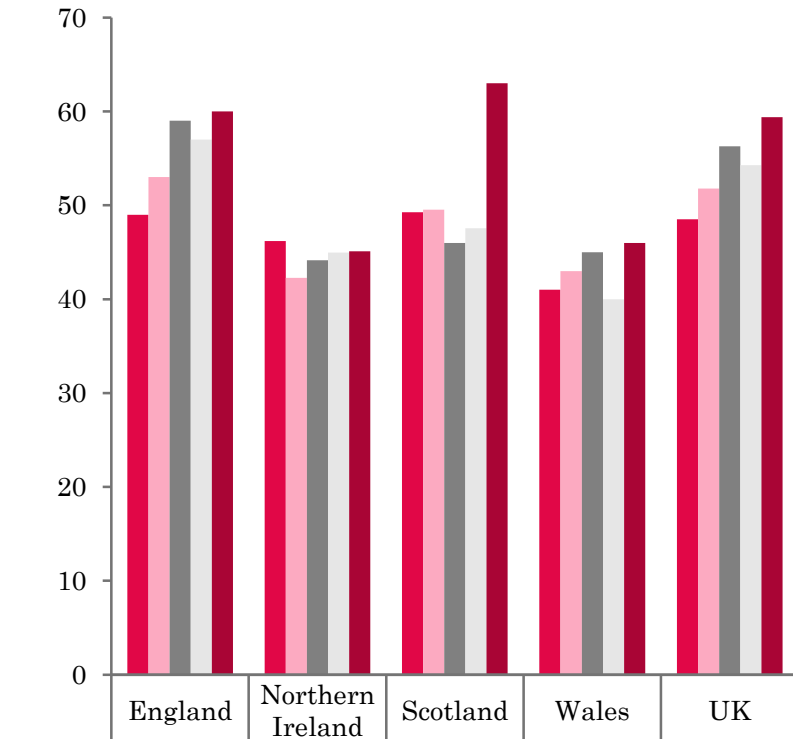


NATIONAL BEDSPACE OCCUPANCY FEBRUARY 2009-2013



	England	Northern Ireland	Scotland	Wales	UK
2009	35	33	35	28	35
2010	36	30	36	30	36
2011	42	31	33	30	40
2012	42	29	33	29	40
2013	44	31	45	33	43

NATIONAL ROOM OCCUPANCY FEBRUARY 2009-2013



	England	Northern Ireland	Scotland	Wales	UK
2009	49	46	49	41	49
2010	53	42	50	43	52
2011	59	44	46	45	56
2012	57	45	48	40	54
2013	60	45	63	46	59



- ❖ Bedspace occupancy varied from 45% in Scotland to 31% in Northern Ireland during February 2013.
- ❖ In the UK, both room and bed occupancy levels had increased when compared with 2012, rising by 5 percentage points for room occupancy and 3 points in bed occupancy, at its highest level in February in 5 years.
- ❖ England witnessed an increase in both room and bed occupancy when compared with February 2012.
- ❖ Room occupancy levels in Scotland had risen dramatically by 15 percentage points when compared with the previous year. Bed occupancy had also increased significantly (a 12 percentage point increase on February 2012).
- ❖ Northern Ireland witnessed an increase in bed occupancy during February 2013 (by 2 percentage points) although bed occupancy levels remained static when compared to the previous year.
- ❖ Bedspace occupancy by non-UK residents rose slightly during February 2013 (by 1 percentage point), with England mirroring the UK level. Both Wales and Northern Ireland remained at the same levels when compared to February 2012. (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: February 2011 - 2013

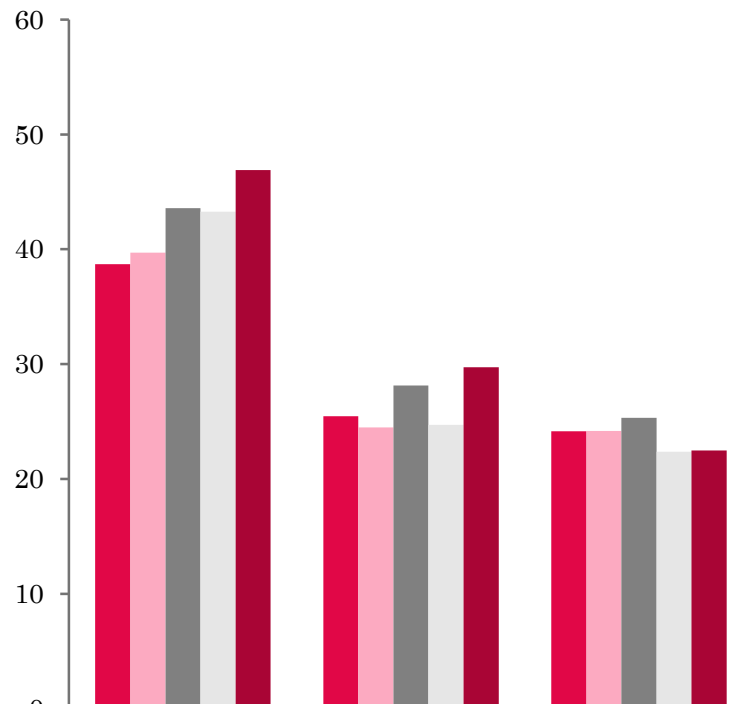
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	42	42	44	59	57	60	1598	1582	1483
Northern Ireland	31	29	31	44	45	45	206	176	142
Scotland	33	33	45	46	48	63	331	297	286
Wales	30	29	33	45	40	46	155	121	121
UK	40	40	43	56	54	59	2290	2176	2032

Table 2: UK/Non UK Occupancy Levels February 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	29	31	29	5	4	5	9	8	9	15	11	15	1598	1582	1483
Northern Ireland	20	18	20	11	11	11	30	31	28	37	39	35	206	176	142
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	331	297	286
Wales	25	25	29	1	1	1	**	**	**	5	4	4	155	121	121
UK	29	30	29	5	4	5	9	9	10	15	11	15	2290	2176	2032

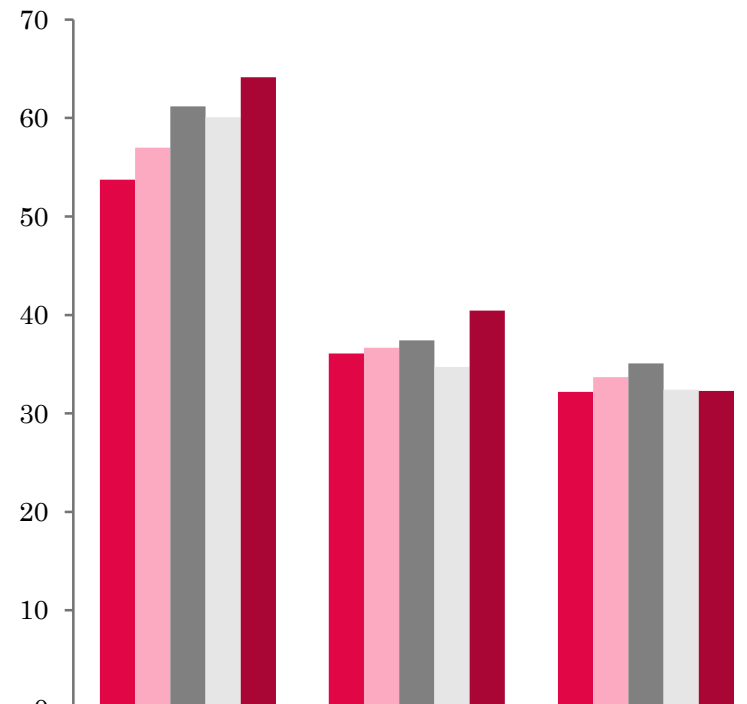
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UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION FEBRUARY 2009-2013



	Hotels	Guesthouses	B&Bs
2009	39	25	24
2010	40	25	24
2011	44	28	25
2012	43	25	22
2013	47	30	22

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



	Hotels	Guesthouses	B&Bs
2009	54	36	32
2010	57	37	34
2011	61	37	35
2012	60	35	32
2013	64	40	32



- UK figures showed that occupancy levels in both hotels and guesthouses had increased when compared to February 2012, in both bedspace and room occupancy. Guesthouses witnessed the biggest increase in both room and bed occupancy rising by 5 percentage points respectively. B&B's occupancy levels remained static when compared to the previous year. (Table 3).
- Four out of the six size band categories increased in both measures of occupancy during February 2013 compared to last year. The biggest increase in both room and bed occupancy was in the 26-50 size band, both up by 7 percentage points compared to 2012. Only the 1-3 size band saw a slight drop in both levels of occupancy falling by 1 percentage point in bed and again 1 percentage point in room when compared with the previous year. (Tables 6 and 7).
- Compared with February 2012, both room and bed occupancy levels across all location types had increased. City/Large town location saw the biggest increase rising by 5 percentage points in both room and bed occupancy when compared to 2012. (Table 8).
- When looking at occupancy levels by tariff, three out of the five tariff band categories witnessed an increase in both their room and bed occupancy levels compared to February 2012. The biggest of these was found in the >£60.00 category rising by 5 percentage points in room occupancy and 3 percentage points in bedspace occupancy. Both the £20-£29 and £40-£49 size bandings witnessed an increase in both room and bed occupancy levels, whereas the £30-£39 and £50-£59 categories witnessed a downturn in occupancy levels.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	45	45	48	63	62	65	962	1002	984
Northern Ireland	37	36	37	53	56	53	71	61	47
Scotland	39	39	45	54	55	64	235	219	211
Wales	36	34	39	54	50	56	91	69	65
UK	44	43	47	61	60	64	1359	1351	1307
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	30	27	31	40	38	42	250	227	198
Northern Ireland	22	17	27	32	24	38	23	20	18
Scotland	23	20	28	30	28	39	52	36	35
Wales	16	11	16	20	15	22	22	21	24
UK	28	25	30	37	35	40	347	304	275
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	28	24	24	39	35	35	386	353	314
Northern Ireland	11	8	11	16	13	18	112	95	77
Scotland	14	19	17	19	28	23	44	42	40
Wales	17	16	19	21	19	22	42	31	32
UK	25	22	22	35	32	32	584	521	463



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: February 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	43	44	45	41	40	42	53	53	54	62	61	62
Northern Ireland	35	36	36	24	25	28	46	50	46	40	46	46
Scotland	39	39	50	30	31	40	46	47	61	47	49	65
Wales	35	32	37	26	26	30	45	39	45	45	40	46
UK	42	42	45	38	37	41	52	51	54	59	58	61



Table 5: Non-UK Percentages: February 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	8	7	7	10	9	11	14	10	15	16	12	18
Northern Ireland	30	35	24	34	37	33	38	43	30	39	47	40
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	4	3	4	5	5	5
UK	8	8	7	11	10	12	14	10	15	16	12	18

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Table 6: Occupancy Levels by Size: February 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	21	19	18	204	26	24	23	287	35	30	32	115
Northern Ireland	7	6	14	65	18	13	18	21	26	23	25	20
Scotland	13	18	13	36	25	20	23	52	29	33	38	44
Wales	13	10	12	31	23	18	21	32	30	28	38	21
UK	19	18	17	336	26	23	23	392	34	30	33	200

Table6: Occupancy Levels by Size: February 2011 - 2013

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms⁵⁶			
	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013	2011	2012	2013	Sample Size 2013
England	39	39	46	68	45	45	51	41	49	48	50	768
Northern Ireland	26	25	24	15	36	34	35	14	44	44	44	7
Scotland	34	37	42	54	45	44	47	46	48	46	46	54
Wales	37	37	46	20	35	39	41	10	41	38	41	7
UK	38	38	45	157	44	44	50	111	48	47	49	836



Table 7: Occupancy Levels by Size: February 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	29	27	25	204	36	34	33	287	48	43	46	115
Northern Ireland	11	11	22	65	23	18	26	21	42	32	36	20
Scotland	17	26	20	36	34	31	32	52	42	43	48	44
Wales	18	11	17	31	28	24	26	32	43	43	40	21
UK	27	25	24	375	35	33	32	392	47	43	46	200

Table 7: Occupancy Levels by Size: February 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	55	52	60	68	63	64	65	41	69	68	71	768
Northern Ireland	44	48	40	15	55	56	52	14	57	62	60	7
Scotland	49	50	57	54	61	62	66	46	67	65	66	54
Wales	52	53	58	20	59	58	59	10	64	56	67	7
UK	54	52	59	157	62	63	65	111	68	67	70	836



Table 8: Occupancy Levels by Location Types: February 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	31	32	189	50	47	51	592	36	37	40	330	32	37	35	372
Northern Ireland	29	31	29	33	37	34	37	43	21	14	23	45	13	10	15	21
Scotland	30	29	37	33	43	41	47	116	24	26	36	61	24	28	43	76
Wales	32	31	42	33	43	37	45	14	23	29	26	16	27	22	23	58
UK	33	31	33	288	48	45	50	765	33	34	38	452	30	34	35	527

Table 8: Occupancy Levels by Location Types: February 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	44	189	68	65	68	592	56	55	58	330	47	47	47	372
Northern Ireland	38	35	39	33	53	55	54	43	30	26	32	45	19	14	24	21
Scotland	40	41	51	33	62	60	67	116	36	40	54	61	33	37	53	76
Wales	44	41	48	33	64	55	70	14	46	44	39	16	36	31	31	58
UK	41	42	45	288	67	63	68	765	52	51	56	452	44	44	47	527

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	**	**	**	**	12	11	12	32	22	20	16	132
Northern Ireland	**	**	**	**	10	5	12	18	12	11	11	43
Scotland	**	**	**	**	17	17	24	19	21	23	28	52
Wales	**	**	**	**	13	8	11	9	17	17	20	38
UK	**	**	**	**	13	11	14	78	21	20	18	265

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	29	26	26	161	35	32	31	78	44	44	47	1041
Northern Ireland	25	26	20	25	27	29	24	20	39	36	39	35
Scotland	26	24	37	26	38	38	43	33	41	41	46	156
Wales	27	23	17	16	42	44	43	14	35	32	42	44
UK	28	26	27	228	36	34	33	145	43	43	46	1276

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	**	**	**	**	22	22	22	32	31	29	24	132
Northern Ireland	**	**	**	**	16	9	16	18	17	17	20	43
Scotland	**	**	**	**	23	26	33	19	32	38	45	52
Wales	**	**	**	**	17	10	14	9	23	20	25	38
UK	**	**	**	**	22	21	23	78	30	29	27	265

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	37	34	35	161	48	47	42	78	62	61	65	1041
Northern Ireland	38	38	28	25	34	35	33	20	54	56	55	35
Scotland	36	35	56	26	47	50	60	33	58	56	65	156
Wales	36	32	32	16	54	57	53	14	56	48	57	44
UK	37	34	38	228	48	48	45	145	61	59	64	1276

** 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)

