



UNITED KINGDOM OCCUPANCY SURVEY

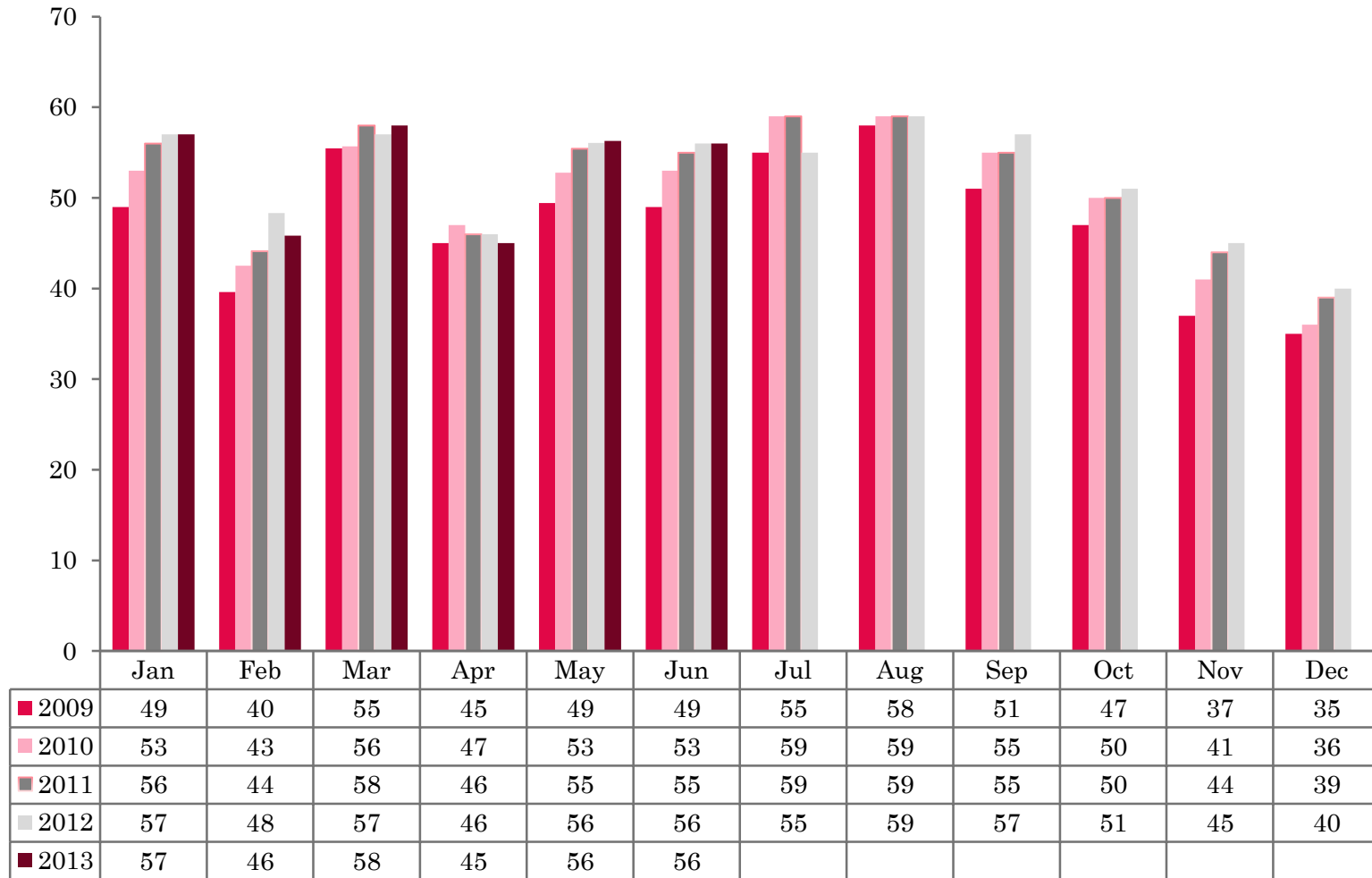
Serviced Accommodation Summary Report
June 2013

UK OCCUPANCY SURVEY

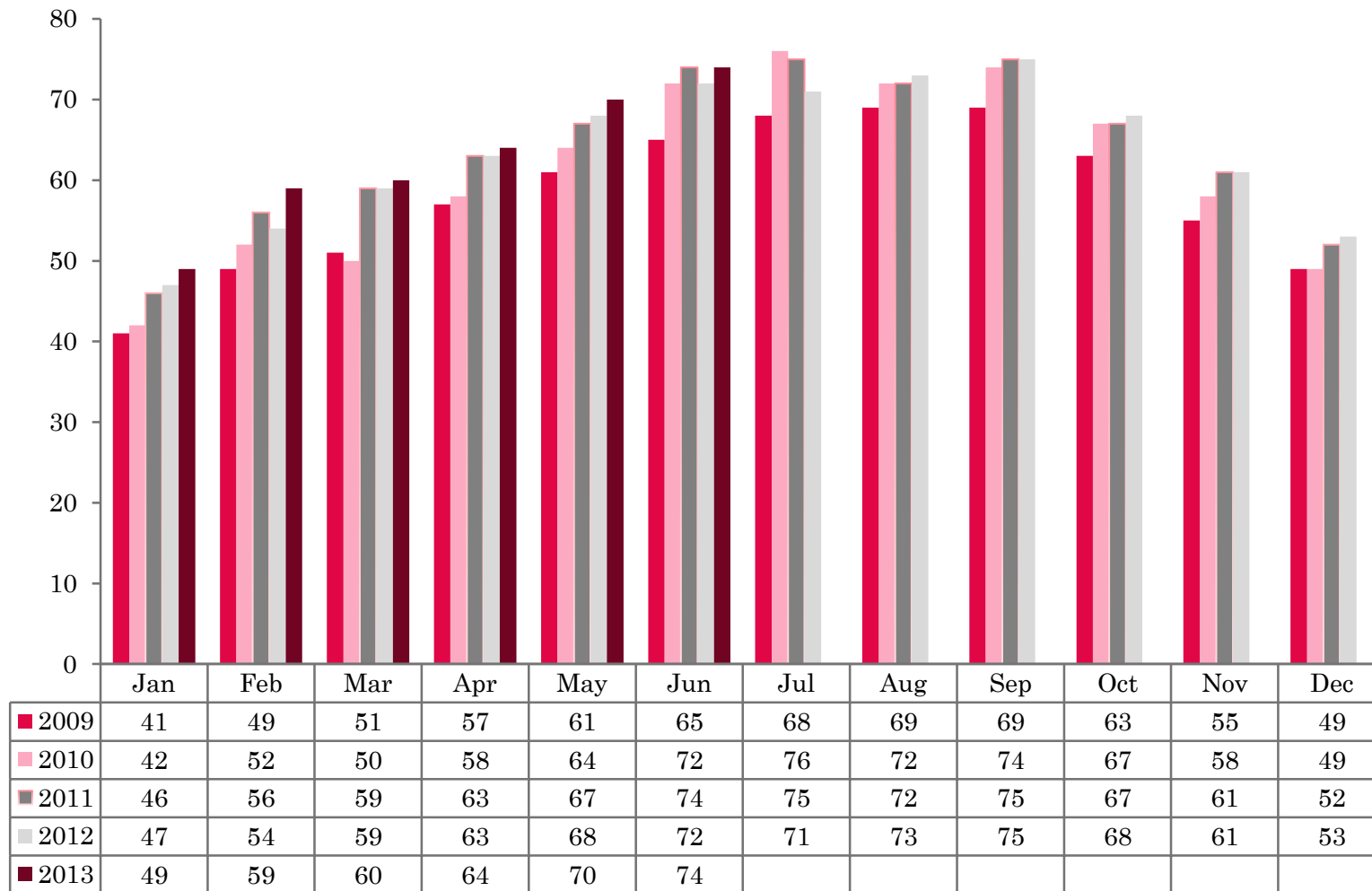
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2009 - 2013



UK BEDROOM OCCUPANCY 2009 - 2013

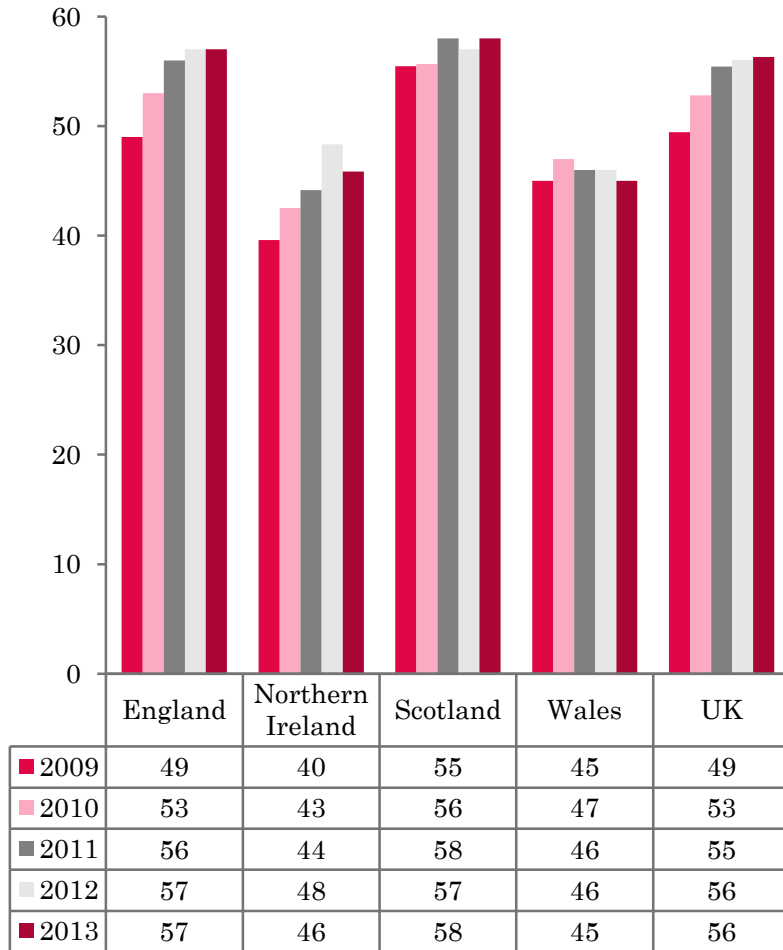


- ❖ 2,671 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

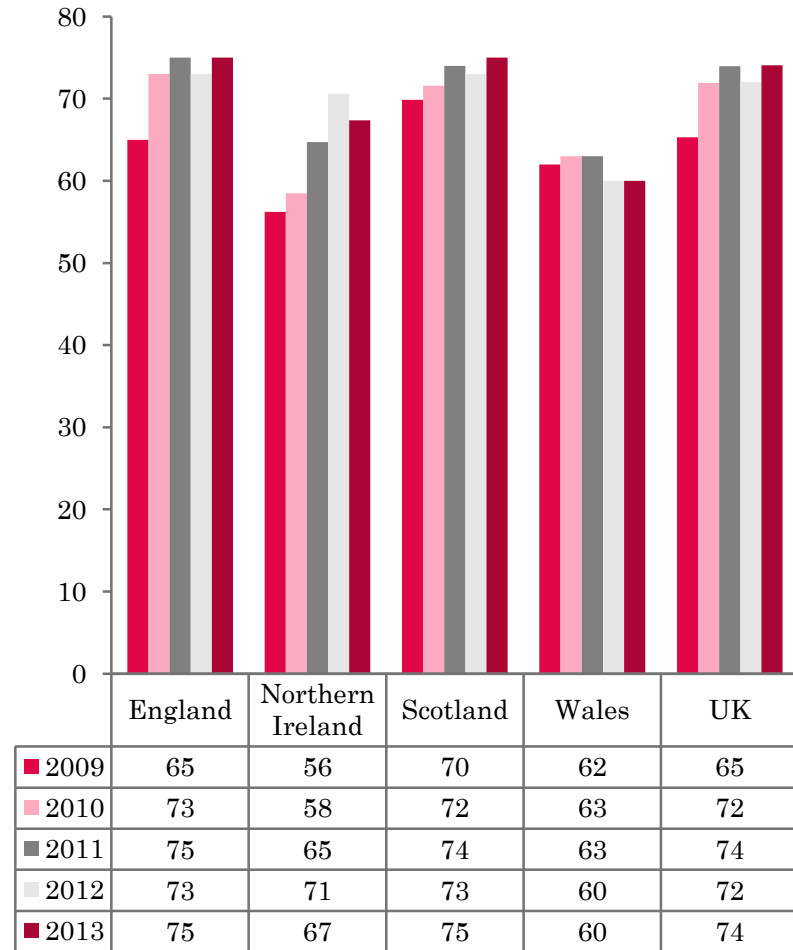
- ❖ UK bedspace occupancy (56%) remained on a par with June 2012. UK bedroom occupancy (74%) had risen by 2 percentage points, when compared with the same period in June 2012.



NATIONAL BEDSPACE OCCUPANCY JUNE 2009-2013



NATIONAL ROOM OCCUPANCY JUNE 2009-2013



- Bedspace occupancy varied from 57% in England to 45% in Wales during June 2013.
- In the UK during June 2013, bedspace levels remained the same as June 2012 with room occupancy levels rising by 2 percentage points when compared with the same period the previous year.
- Bedspace occupancy in Wales saw a marginal fall of 1 percentage point compared with the previous year with room occupancy remaining at the same level (60%) as in June 2012.
- England mirrored the UK as a whole with an increase of 2 pp in room occupancy during this month, but no change in bed occupancy levels when compared with June 2012.
- Both measures of room and bedspace occupancy in Scotland increased by 1 and 3 percentage points respectively when compared with the previous year.
- Bed occupancy in Northern Ireland fell by 2 percentage points during June 2013, with room occupancy witnessing a more noticeable decrease, falling by 4 percentage points when compared to the previous year.
- Bedspace occupancy by non-UK residents stayed the same as June 2012, with England mirroring the UK level. Northern Ireland remained at the same levels as the previous year with only Wales witnessing an increase (up 2 percentage points). (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: June 2011 - 2013

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	56	57	57	75	73	75	1705	1610	2051
Northern Ireland	44	48	46	65	71	67	174	173	169
Scotland	58	57	58	74	73	75	376	339	313
Wales	46	46	45	63	60	60	175	143	138
UK	55	56	56	74	72	74	2430	2265	2671

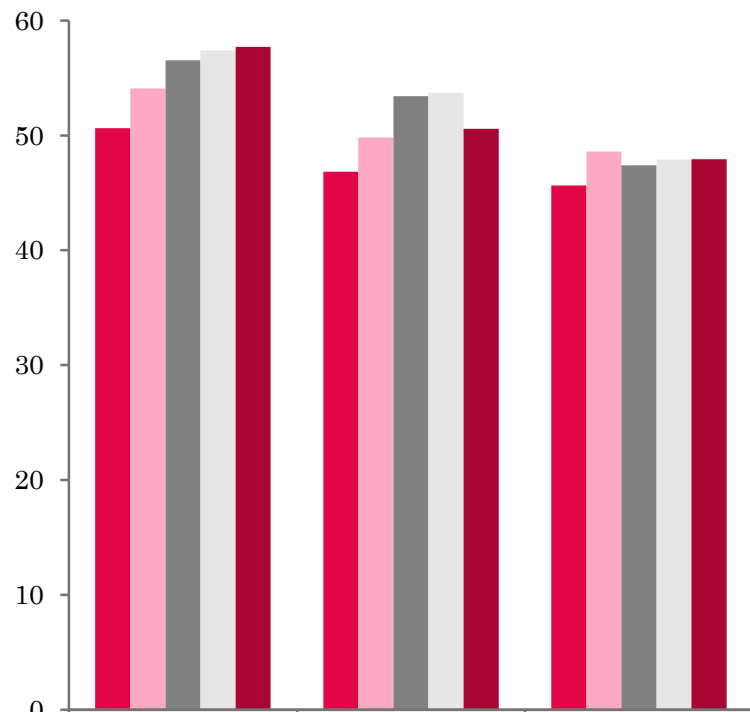
Table 2: UK/Non UK Occupancy Levels June 2011 – 2013 (see note 5a and 5b Slide 19)

	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	46	46	43	10	8	8	15	12	13	18	15	16	1705	1610	2051
Northern Ireland	20	25	22	24	24	24	39	36	43	55	49	52	174	173	169
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	376	339	313
Wales	41	41	40	4	2	4	**	**	**	8	6	9	175	143	138
UK	45	45	42	10	8	8	16	13	14	18	15	16	2430	2265	2671

** FIGURES NOT AVAILABLE

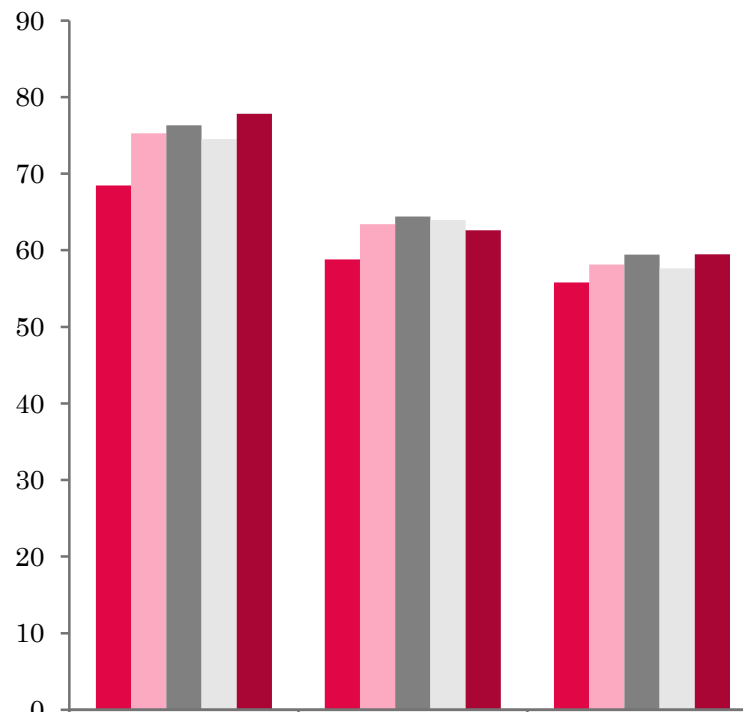


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JUNE 2009-2013



	Hotels	Guesthouses	B&Bs
2009	51	47	46
2010	54	50	49
2011	57	53	47
2012	57	54	48
2013	58	51	48

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



	Hotels	Guesthouses	B&Bs
2009	68	59	56
2010	75	63	58
2011	76	64	59
2012	75	64	58
2013	78	63	59



- Only the hotel sector saw a rise in both room and bed occupancy levels during this month, up 1 percentage point for bedspace occupancy and 3 pp in room. B&B establishments saw a slight rise of 1 percentage point in room occupancy but remained the same in bed occupancy compared with the previous year. Guesthouse accommodation saw a 3 percentage point drop in bed occupancy and a 1 pp fall in room occupancy. (Table 3).
- The biggest increase in both room and bed occupancy was in the 100+ size band, up by 2 pp in bed and 5 pp in room occupancy. The smallest size band also fared better than most, with both bed and room occupancy levels increasing compared to 2012 (up 2 and 4 percentage points respectively). There was a fall in both bed and room occupancy levels in the 4-10 and 51-100 size band (between 1 and 2 percentage points) whilst the 11-25 and 26-50 size bands increased for room occupancy levels but bed occupancy either fell (26-50 rooms) or stayed the same as the previous year (4-10 size band). (Tables 6 and 7).
- Across two of the location types, both bed and room occupancy levels had risen compared with the previous year with City/Large Town locations increasing by 2 percentage points in bedspace occupancy and 6pp in room occupancy. Seaside locations witness a 3 pp increase in bed occupancy and a marginal rise of 1 pp in room occupancy levels. Bedspace occupancy levels in Small Towns and Countryside/Village locations witnessed a 2 pp increase in room occupancy but had stayed the same (Small Town) or decreased (Countryside/Village) on last years results. (Table 8).
- When looking at occupancy levels by tariff, only the £20.00-£29.99 category had witnessed an increase in both the room and bed occupancy levels compared to June 2012. The largest tariff band £60+ saw a 3pp rise in room occupancy but a small decrease of 1 pp in bed occupancy levels. Both the £30.00-£39.99 and the £40.00-£49.99 fell in both measures of occupancy during this period.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	57	58	58	77	75	78	1033	994	1496
Northern Ireland	48	52	52	70	78	78	67	59	63
Scotland	59	59	60	77	76	80	245	225	214
Wales	48	49	49	68	65	69	86	70	68
UK	57	57	58	76	75	78	1431	1348	1841
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	54	55	51	65	65	64	264	239	214
Northern Ireland	26	43	38	34	53	49	18	23	18
Scotland	60	57	55	71	69	64	58	49	44
Wales	40	36	36	52	45	43	31	30	28
UK	53	54	51	64	64	63	371	341	304
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	48	49	48	61	59	60	408	377	341
Northern Ireland	23	29	25	32	41	36	89	91	88
Scotland	51	48	53	60	59	64	73	65	55
Wales	39	41	41	46	45	48	58	43	42
UK	47	48	48	59	58	59	628	576	526



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: June 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	58	59	57	53	53	53	71	70	71	78	74	79
Northern Ireland	45	53	50	36	42	42	63	71	68	62	69	68
Scotland	61	60	60	56	55	58	72	71	71	76	74	79
Wales	50	49	49	44	42	41	62	60	61	63	60	60
UK	58	58	57	53	52	53	70	70	70	77	73	78



Table 5: Non-UK Percentages: June 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	13	11	11	17	15	16	18	14	15	20	16	17
Northern Ireland	40	37	43	48	43	51	63	53	53	67	58	57
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	7	5	8	9	6	11
UK	14	12	12	18	16	17	18	14	15	20	16	18

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Table 6: Occupancy Levels by Size: June 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	46	45	45	225	49	49	49	314	51	52	51	120
Northern Ireland	18	21	21	70	34	42	38	26	30	45	35	29
Scotland	48	46	52	49	60	56	53	61	57	59	61	48
Wales	32	26	37	37	44	45	41	41	48	46	42	24
UK	45	43	45	381	50	50	49	442	51	52	52	221

Table6: Occupancy Levels by Size: June 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	56	60	59	67	61	62	59	38	56	57	57	1287
Northern Ireland	47	40	39	19	36	46	49	16	57	61	61	9
Scotland	58	59	60	59	62	64	63	43	60	59	62	53
Wales	48	55	51	19	48	52	53	11	49	44	55	6
UK	56	59	58	164	60	61	59	108	56	56	58	1355



Table 7: Occupancy Levels by Size: June 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	55	52	54	225	61	60	61	314	66	64	67	120
Northern Ireland	26	32	29	70	39	46	48	26	50	62	48	29
Scotland	57	57	64	49	71	68	63	61	70	70	74	48
Wales	40	32	46	37	55	55	50	41	65	59	54	24
UK	54	51	55	375	62	61	60	442	66	64	67	221

Table 7: Occupancy Levels by Size: June 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	74	74	76	67	78	77	75	38	82	78	82	1287
Northern Ireland	62	66	67	19	67	76	74	16	78	86	88	9
Scotland	74	75	79	59	81	81	84	43	84	81	86	53
Wales	65	70	69	19	74	69	77	11	67	65	85	6
UK	73	74	76	164	78	77	76	108	81	78	83	1355



Table 8: Occupancy Levels by Location Types: June 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	57	56	59	222	60	59	60	1019	49	51	51	415	53	55	54	395
Northern Ireland	44	46	44	47	50	54	53	47	27	35	35	51	24	29	25	24
Scotland	65	58	65	38	59	60	61	122	51	50	50	67	56	56	58	86
Wales	53	55	55	36	42	38	52	11	42	46	40	20	45	44	39	71
UK	58	56	59	343	59	58	60	1199	48	50	50	553	52	54	53	576

Table 8: Occupancy Levels by Location Types: June 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	67	68	69	222	81	77	83	1019	68	70	72	415	68	67	69	395
Northern Ireland	59	64	61	47	73	81	80	47	42	49	47	51	40	39	43	24
Scotland	77	73	78	38	81	80	81	122	66	64	67	67	66	68	71	86
Wales	69	68	67	36	63	56	74	11	64	67	67	20	58	53	49	71
UK	68	69	70	343	80	76	82	1199	67	68	70	553	67	66	68	576

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	**	**	**	**	29	31	33	39	39	42	39	133
Northern Ireland	**	**	**	**	21	29	15	16	22	32	25	40
Scotland	**	**	**	**	45	38	44	18	52	49	49	57
Wales	**	**	**	**	23	13	27	7	41	42	38	41
UK	**	**	**	**	31	31	34	80	41	43	40	271

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	57	56	53	172	56	55	53	89	57	58	57	1589
Northern Ireland	38	39	34	39	53	36	43	26	48	54	54	448
Scotland	60	63	56	33	61	58	68	37	61	61	62	168
Wales	50	46	36	24	48	56	50	18	49	48	52	48
UK	57	56	52	268	56	55	55	170	57	58	57	2253

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	**	**	**	**	40	43	42	39	51	52	51	133
Northern Ireland	**	**	**	**	27	40	24	16	30	40	34	40
Scotland	**	**	**	**	55	52	56	18	64	63	63	57
Wales	**	**	**	**	31	17	35	7	53	54	47	41
UK	**	**	**	**	41	42	43	80	52	54	52	271

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	67	66	66	172	68	66	63	89	78	75	78	1589
Northern Ireland	55	56	49	39	68	58	62	26	71	80	80	448
Scotland	74	75	70	33	75	72	82	37	79	78	81	168
Wales	65	60	54	24	69	66	61	18	68	65	71	48
UK	68	67	66	268	69	67	66	170	77	75	78	2253

** 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 can 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)

