



UNITED KINGDOM OCCUPANCY SURVEY

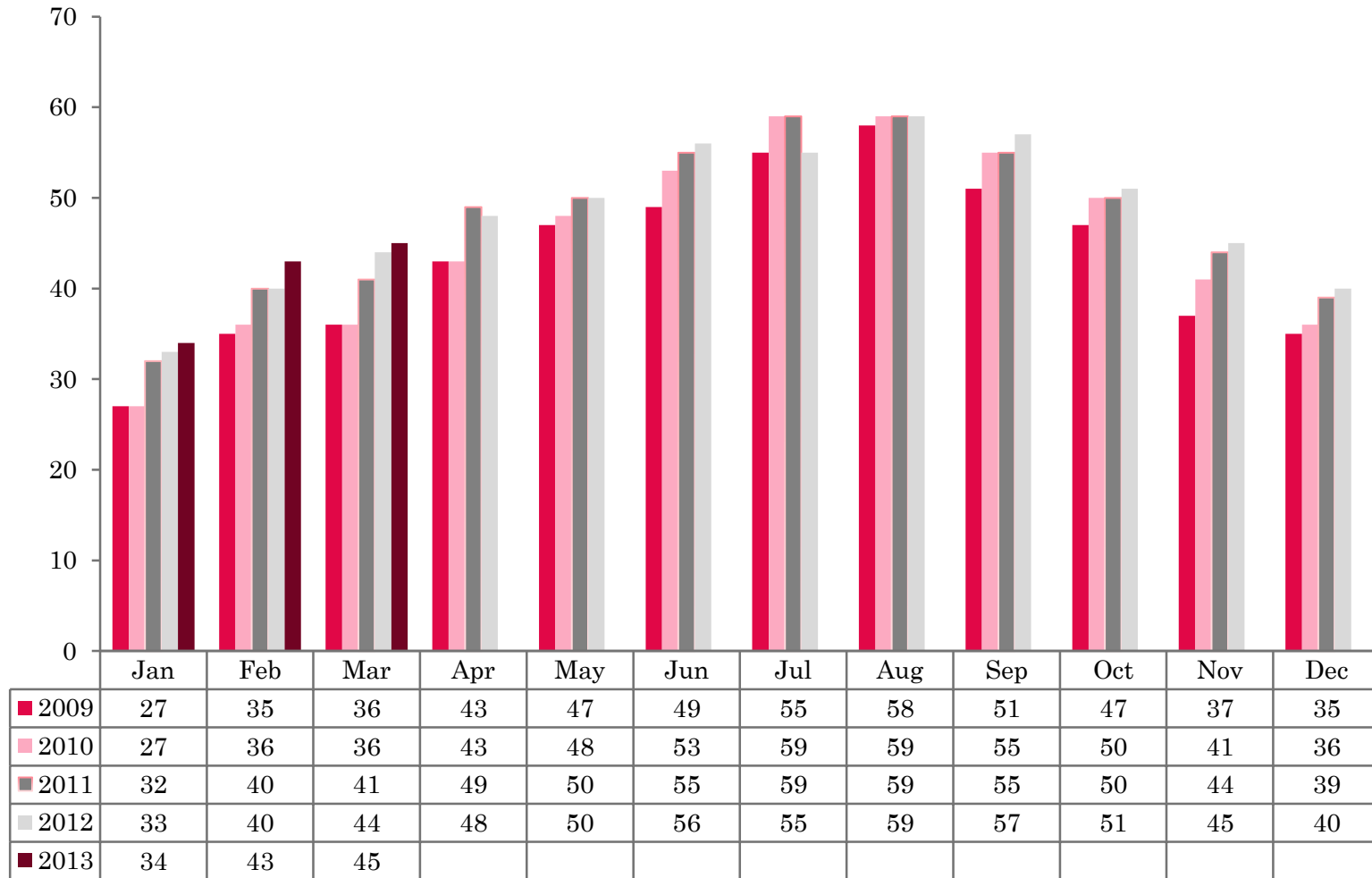
Serviced Accommodation Summary Report
March 2013

UK OCCUPANCY SURVEY

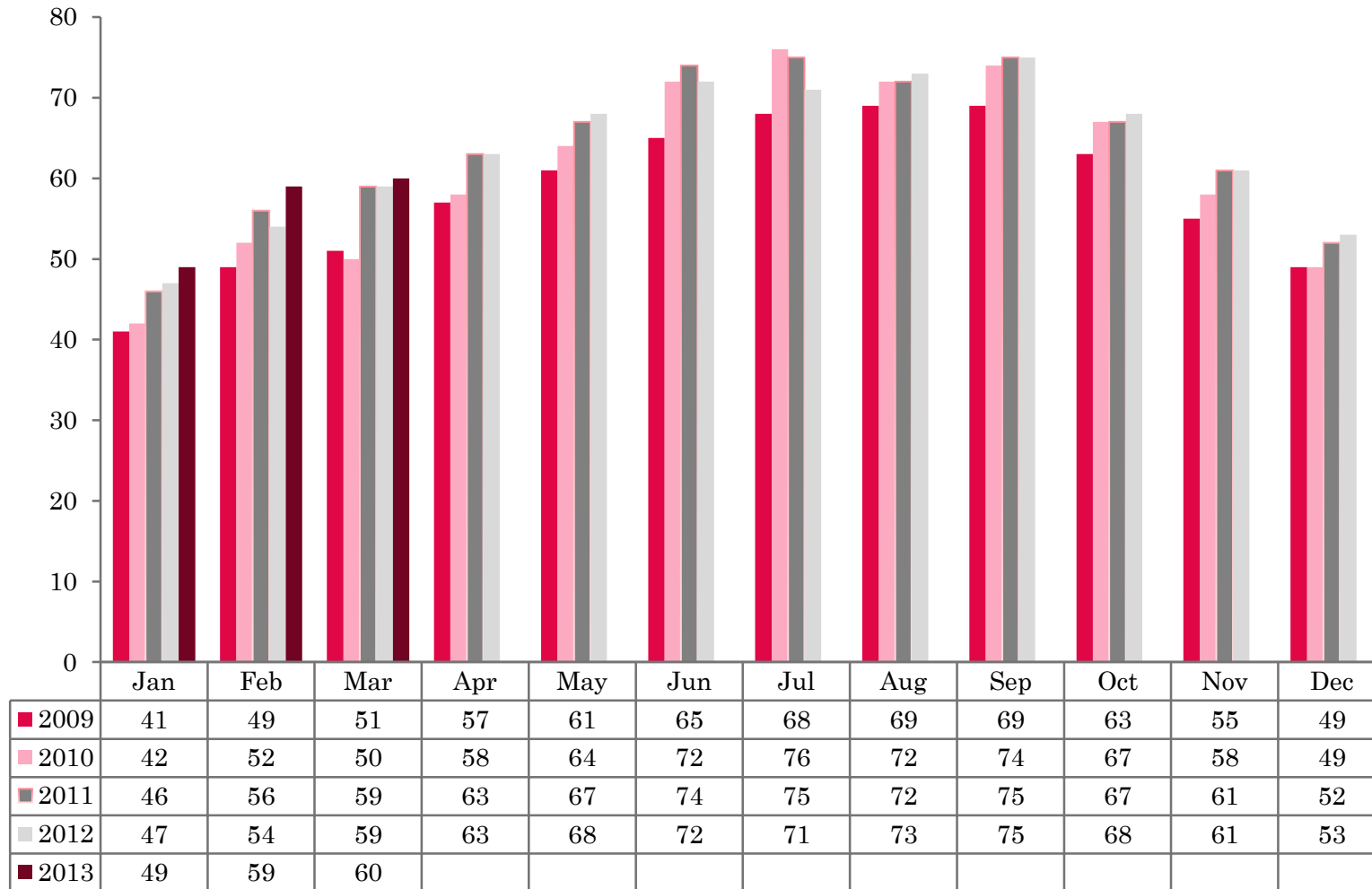
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2009 - 2013



UK BEDROOM OCCUPANCY 2009 - 2013

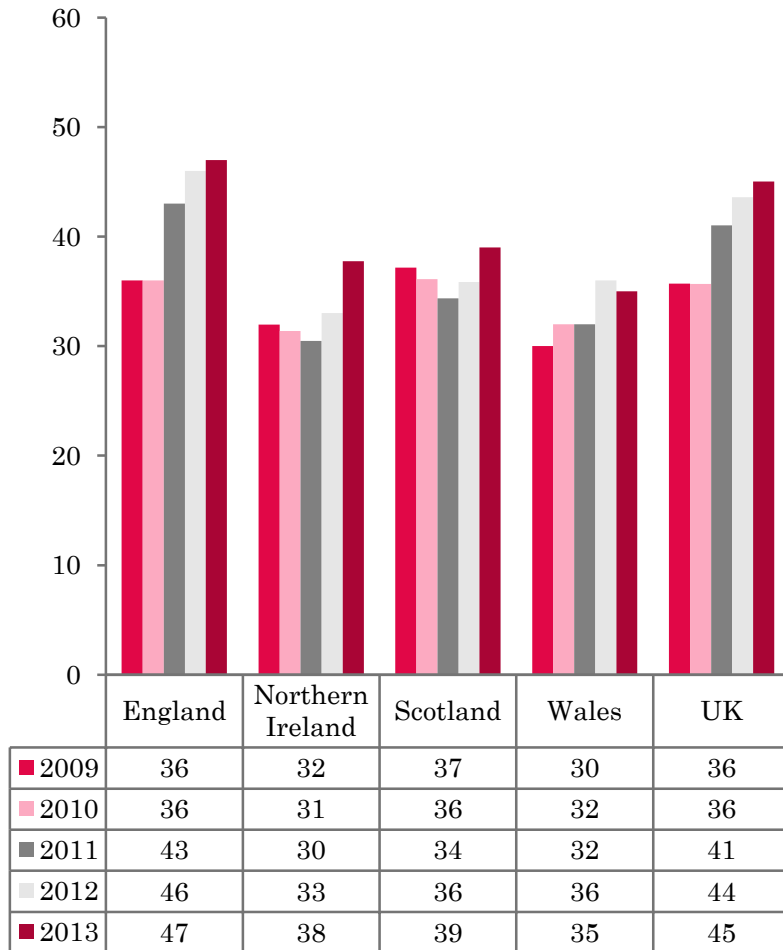


❖ 2,159 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

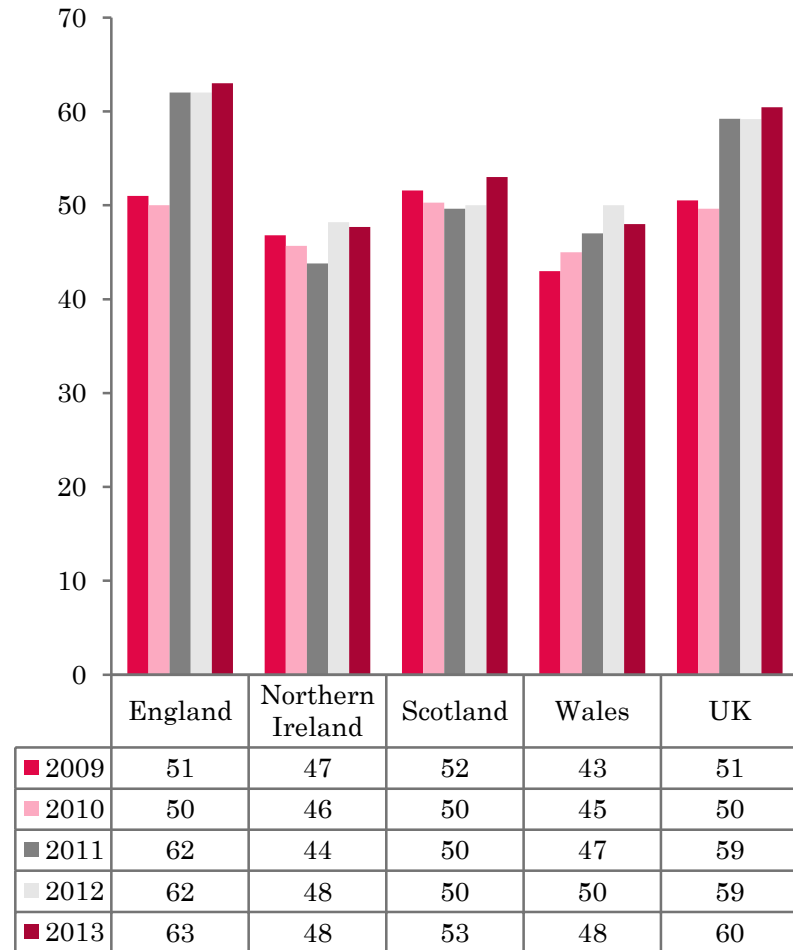
❖ UK bedspace occupancy (45%) and UK bedroom occupancy (60%) had both risen by 1 percentage point, when compared with the same period in March 2012.



NATIONAL BEDSPACE OCCUPANCY MARCH 2009-2013



NATIONAL ROOM OCCUPANCY MARCH 2009-2013



- ❖ Bedspace occupancy varied from 47% in England to 35% in Wales during March 2013.
- ❖ In the UK, both room and bed occupancy levels had increased marginally when compared with 2012, rising by 1 percentage point for both room and bedspace occupancy.
- ❖ England witnessed a slight increase in both room and bed occupancy when compared with March 2012.
- ❖ Room occupancy levels in Scotland had risen by 3 percentage points when compared with the previous year. Bed occupancy had also risen by the same margin compared to March 2012.
- ❖ Northern Ireland witnessed a 5 percentage point increase in bed occupancy during March 2013, although room occupancy levels remained static when compared to the previous year.
- Bedspace occupancy by non-UK residents remained at the same level as March 2012, with England mirroring the UK level. Northern Ireland saw a 5 percentage point increase during this month whilst Wales remained at the same level when compared to March 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: March 2011 - 2013

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	43	46	47	62	62	63	1641	1613	1558
Northern Ireland	30	33	38	44	48	48	203	186	162
Scotland	34	36	39	50	50	53	357	311	310
Wales	32	36	35	47	50	48	167	141	129
UK	41	44	45	59	59	60	2368	2251	2159

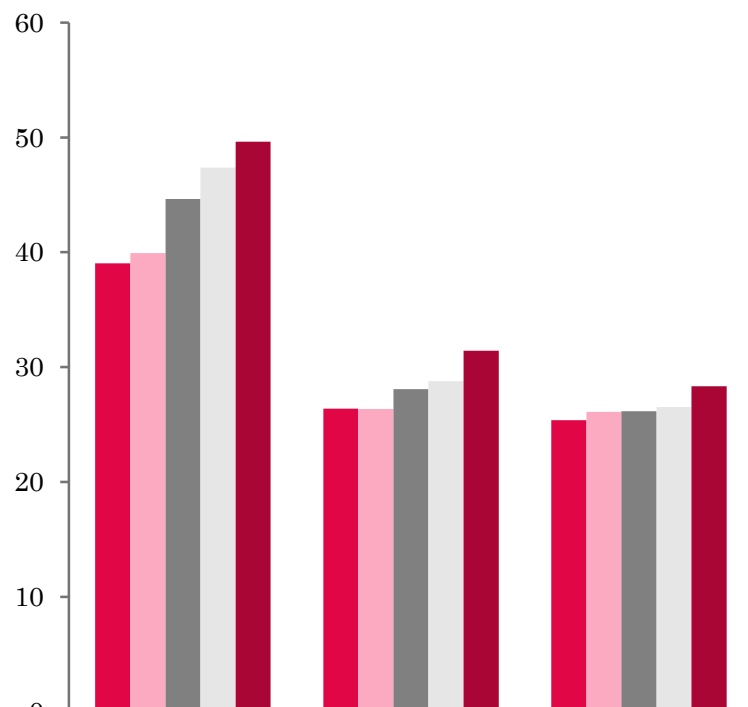
Table 2: UK/Non UK Occupancy Levels March 2011 – 2013 (see note 5a and 5b Slide 19)

	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	30	32	34	5	5	5	11	9	11	15	13	14	1641	1613	1558
Northern Ireland	19	22	22	12	11	16	30	30	30	38	33	42	203	186	162
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	357	311	310
Wales	27	33	29	2	2	2	**	**	**	5	5	6	167	141	129
UK	30	32	33	5	5	5	11	10	12	15	13	14	2368	2251	2159

** FIGURES NOT AVAILABLE

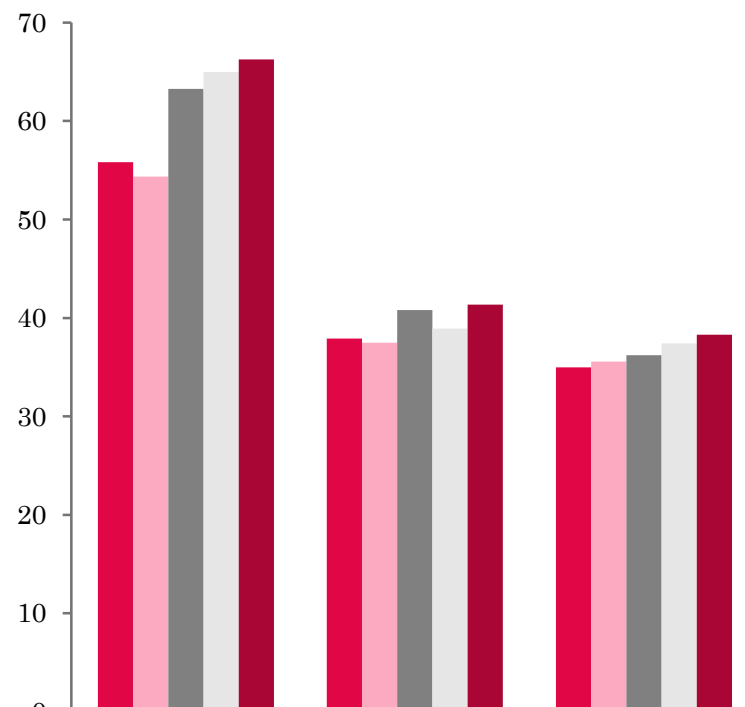


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MARCH 2009-2013



	Hotels	Guesthouses	B&Bs
■ 2009	39	26	25
■ 2010	40	26	26
■ 2011	45	28	26
■ 2012	47	29	27
■ 2013	50	31	28

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



	Hotels	Guesthouses	B&Bs
■ 2009	56	38	35
■ 2010	54	37	36
■ 2011	63	41	36
■ 2012	65	39	37
■ 2013	66	41	38



- Across the UK as a whole, occupancy levels had increased across all establishment types, in both bedspace and room occupancy when compared with March 2012. Hotels witnessed the biggest increase in bed occupancy rising by 3 percentage points. Guesthouse accommodation saw a slight increase in room occupancy, rising by 2 percentage points compared to the previous year. (Table 3).
- Five out of the six size band categories increased in both measures of occupancy during March 2013 compared to last year. The biggest increase in both room and bed occupancy was in the 51-100 size band, up by 8 pp in bed occupancy and 3 pp in room occupancy compared to 2012. Only the 11-25 size band saw a slight drop in both levels of occupancy falling by 2 percentage points in both bed and room occupancy when compared with the previous year. (Tables 6 and 7).
- Both room and bed occupancy measures across all location types had increased during this month. Countryside/Village location saw the biggest increase rising by 3 percentage points in room and 4 percentage points in bed occupancy when compared to the previous year. (Table 8).
- When looking at occupancy levels by tariff, only two out of the five tariff band categories witnessed an increase in both their room and bed occupancy levels compared to March 2012. The biggest of these was found in the £20-£29 category rising by 5 percentage points in room occupancy and 7 percentage points in bedspace occupancy. Both the £30-£39 and £50-£59 size bandings saw a downturn in both room and bed occupancy levels, whereas the occupancy levels for the £40-£49 size banding remained static compared to the same period in 2012.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	46	49	51	65	67	68	983	1003	995
Northern Ireland	38	39	44	53	57	54	71	66	59
Scotland	40	43	46	58	59	62	244	219	220
Wales	38	42	41	55	58	57	93	77	70
UK	45	47	50	63	65	66	1391	1365	1344
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	30	31	34	44	42	45	262	238	222
Northern Ireland	16	25	20	23	34	26	23	20	8
Scotland	24	23	24	33	30	30	55	43	40
Wales	16	17	18	21	25	24	27	30	24
UK	28	29	31	41	39	41	367	331	294
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	29	29	30	40	41	41	396	372	341
Northern Ireland	11	11	13	17	19	22	109	100	95
Scotland	16	18	23	23	27	29	58	49	50
Wales	14	22	24	19	25	30	47	34	35
UK	26	27	28	36	37	38	610	555	521



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: March 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	45	48	50	41	43	44	56	58	60	64	66	65
Northern Ireland	34	36	43	24	27	32	43	50	55	41	46	52
Scotland	38	39	45	32	33	36	47	48	52	51	52	55
Wales	37	42	40	28	31	29	47	52	50	46	48	46
UK	43	46	49	39	40	42	54	56	58	61	62	62



Table 5: Non-UK Percentages: March 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	8	9	13	11	12	13	12	14	16	14	17
Northern Ireland	32	32	27	34	34	34	40	33	41	43	38	49
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	6	5	5	8	4	7
UK	10	9	9	13	12	13	13	12	14	16	14	17

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Table 6: Occupancy Levels by Size: March 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	23	24	25	227	27	29	30	318	36	38	36	124
Northern Ireland	5	8	8	70	17	19	22	23	22	28	26	24
Scotland	14	15	18	42	27	25	28	60	29	36	40	53
Wales	15	13	17	31	23	27	25	37	32	40	35	24
UK	21	22	23	370	27	28	29	438	35	38	36	225

Table6: Occupancy Levels by Size: March 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	41	46	49	69	44	49	58	43	49	50	51	752
Northern Ireland	30	23	25	15	34	39	43	19	46	47	49	11
Scotland	40	42	41	56	48	47	53	46	46	47	50	53
Wales	36	44	44	18	41	42	42	12	44	45	47	7
UK	40	45	47	158	44	48	56	120	48	49	51	823

Table 7: Occupancy Levels by Size: March 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	31	31	33	227	39	39	39	318	49	52	49	124
Northern Ireland	11	13	15	70	23	22	28	23	36	39	39	24
Scotland	20	21	24	42	37	34	35	60	44	46	51	53
Wales	19	17	23	31	28	32	31	37	43	52	45	24
UK	29	28	31	375	38	37	38	438	48	51	49	225

Table 7: Occupancy Levels by Size: March 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	58	63	65	69	65	67	70	43	72	72	73	752
Northern Ireland	43	51	41	15	50	56	61	19	61	65	54	11
Scotland	55	56	56	56	64	64	70	46	68	68	71	53
Wales	50	60	59	18	66	62	57	12	66	64	73	7
UK	57	62	63	158	65	66	69	120	71	71	72	823



Table 8: Occupancy Levels by Location Types: March 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	34	36	39	229	51	53	54	588	38	40	43	333	34	35	40	408
Northern Ireland	25	29	29	41	37	39	45	46	20	22	25	47	12	14	15	28
Scotland	33	35	39	40	44	43	48	115	27	29	31	69	24	29	31	86
Wales	37	41	39	35	40	41	45	13	26	35	36	18	27	29	25	63
UK	34	36	39	345	49	50	52	762	36	38	41	467	32	33	37	585

Table 8: Occupancy Levels by Location Types: March 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	44	48	50	229	71	71	71	588	58	60	60	333	51	49	52	408
Northern Ireland	33	38	37	41	54	58	54	46	28	32	37	47	17	27	27	28
Scotland	45	44	46	40	65	63	68	115	40	41	46	69	34	39	39	86
Wales	50	53	49	35	63	62	69	13	43	52	50	18	35	36	33	63
UK	44	48	49	345	69	69	70	762	54	56	57	467	47	46	49	585

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	**	**	**	**	13	14	21	40	23	24	23	147
Northern Ireland	**	**	**	**	10	13	6	8	11	14	10	33
Scotland	**	**	**	**	18	22	31	14	23	22	25	58
Wales	**	**	**	**	16	11	10	8	16	26	24	40
UK	**	**	**	**	14	15	22	70	22	24	23	278

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	27	33	33	181	34	40	37	84	45	48	50	1057
Northern Ireland	22	30	19	47	29	20	35	26	39	40	45	48
Scotland	27	30	27	36	39	39	46	33	41	44	47	169
Wales	34	31	28	18	40	41	38	16	37	41	42	47
UK	27	32	32	282	35	40	38	159	44	47	49	1321

**** FIGURES NOT AVAILABLE**

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	27	33	40	33	33	30	147
Northern Ireland	**	**	**	**	14	18	7	8	17	19	19	33
Scotland	**	**	**	**	25	30	35	14	38	33	34	58
Wales	**	**	**	**	23	17	15	8	22	31	30	40
UK	**	**	**	**	22	27	32	70	33	33	30	278

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	35	42	43	181	53	54	45	84	65	67	68	1057
Northern Ireland	38	42	28	47	37	44	53	26	54	59	53	48
Scotland	37	40	38	36	53	53	58	33	60	60	64	169
Wales	45	43	43	18	49	55	47	16	56	58	59	47
UK	36	42	42	282	52	54	47	159	64	65	67	1321

**** 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)

