



# UNITED KINGDOM OCCUPANCY SURVEY

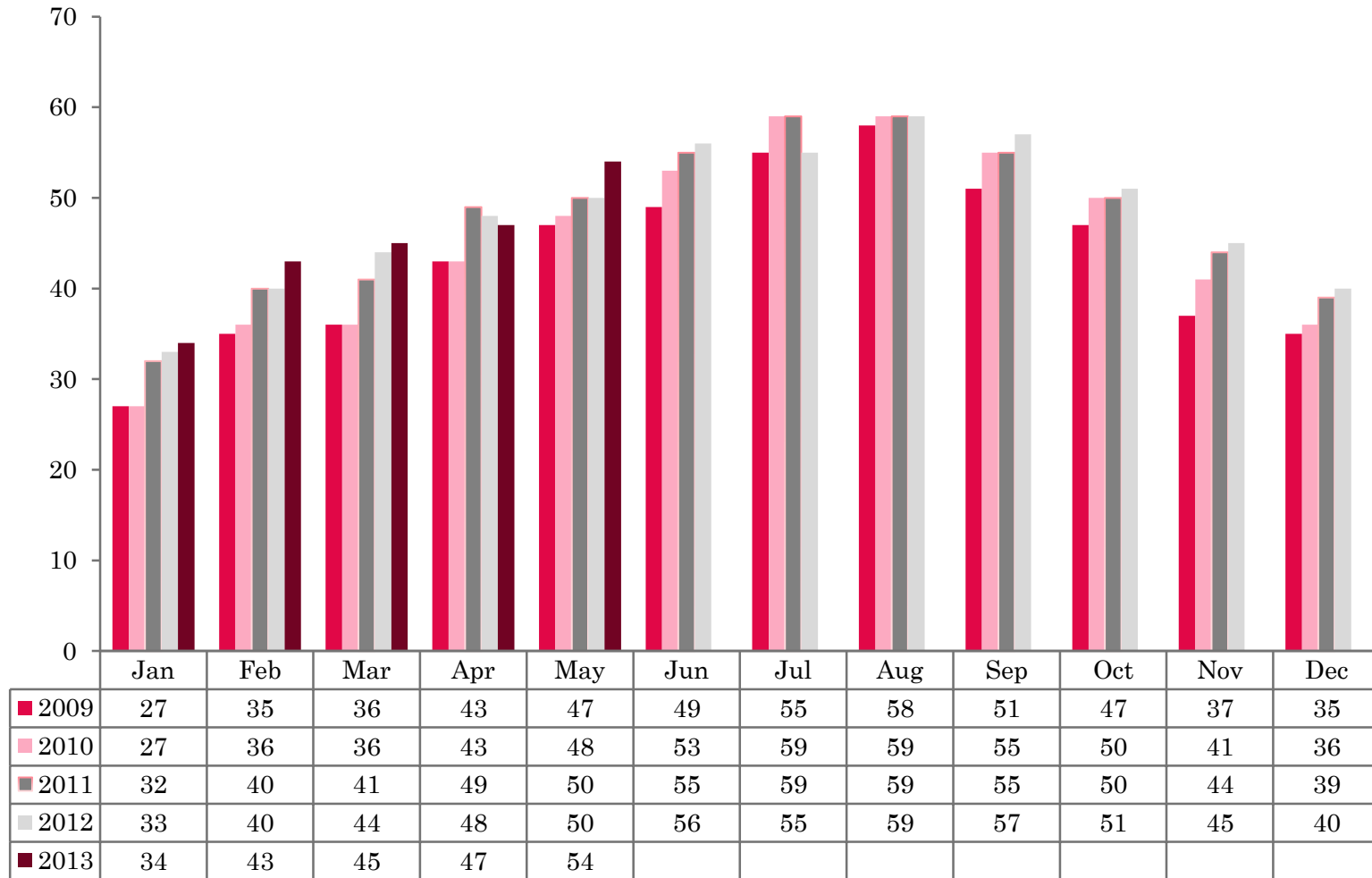
Serviced Accommodation Summary Report  
May 2013

# UK OCCUPANCY SURVEY

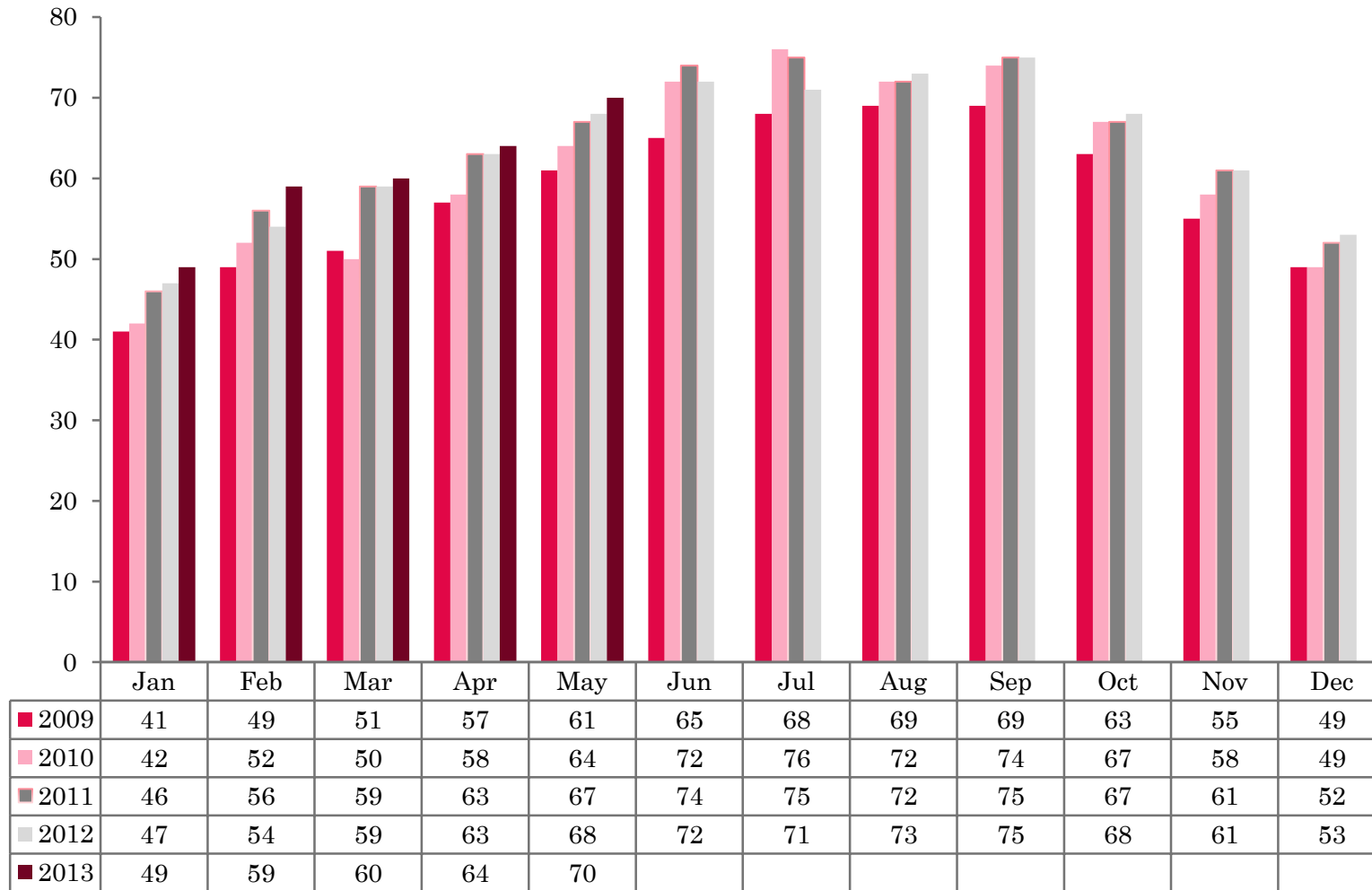
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2009 - 2013



# UK BEDROOM OCCUPANCY 2009 - 2013

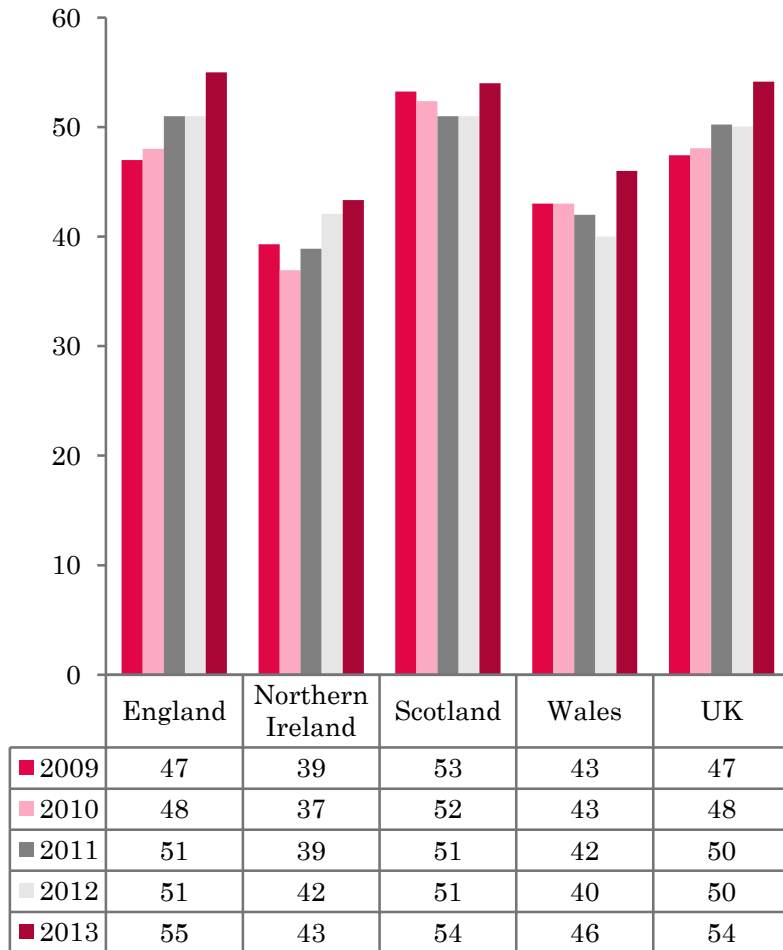


❖ 2,151 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

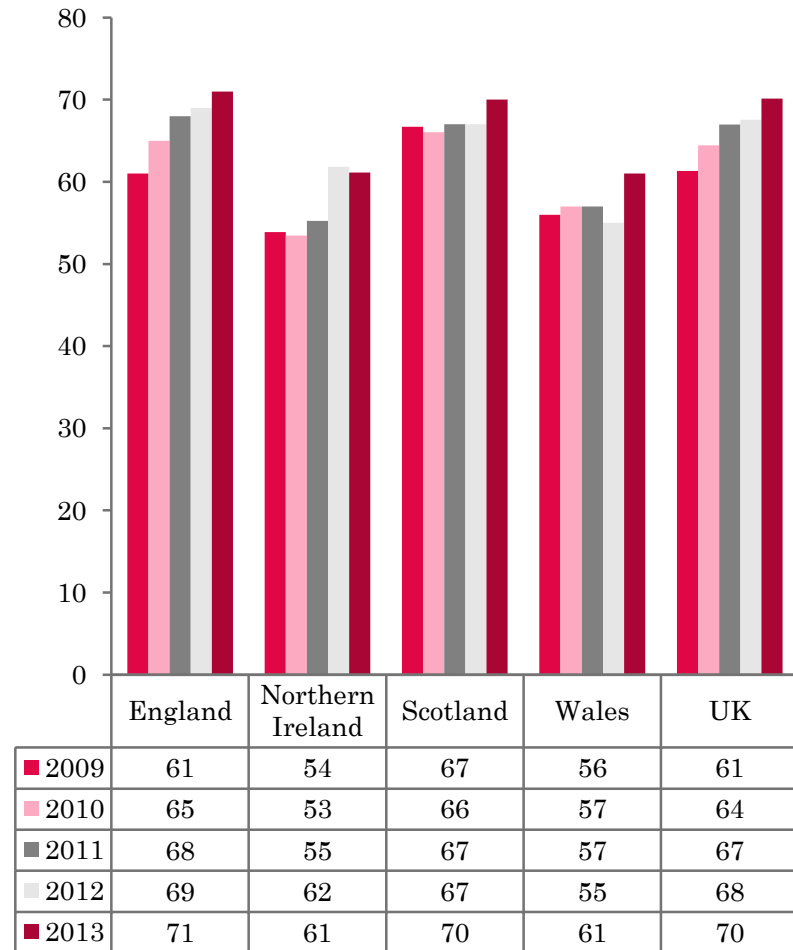
❖ UK bedspace occupancy (54%) had risen by four percentage points and UK bedroom occupancy (70%) had risen by 2 percentage points, when compared with the same period in May 2012.



## NATIONAL BEDSPACE OCCUPANCY MAY 2009-2013



## NATIONAL ROOM OCCUPANCY MAY 2009-2013



- Bedspace occupancy varied from 55% in England to 43% in Northern Ireland during May 2013.
- In the UK during May 2013, both bedspace and room occupancy levels had risen when compared with the same period the previous year, up 4 and 2 percentage points respectively.
- Wales saw the highest rise in both room and bedspace occupancy levels during May 2013, up by 6 percentage points in both measures of occupancy.
- England witnessed an increase of 4 pp in bedspace occupancy during this month, but saw a smaller rise of 2 pp in room occupancy levels when compared with May 2012.
- Both measures of room and bedspace occupancy in Scotland increased by 3 percentage points respectively when compared with the previous year.
- Bed occupancy in Northern Ireland rose slightly, by 1 percentage point during May 2013, with room occupancy level falling marginally (by 1 percentage point) when compared to the previous year.
- Bedspace occupancy by non-UK residents fell slightly compared with May 2012, with England mirroring the UK level. Both Northern Ireland and Wales remained at the same levels as 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: May 2011 - 2013**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	51	51	55	68	69	71	1719	1629	1520
Northern Ireland	39	42	43	55	62	61	172	166	165
Scotland	51	51	54	67	67	70	373	322	324
Wales	42	40	46	57	55	61	157	148	142
<b>UK</b>	50	50	54	67	68	70	2421	2265	2151

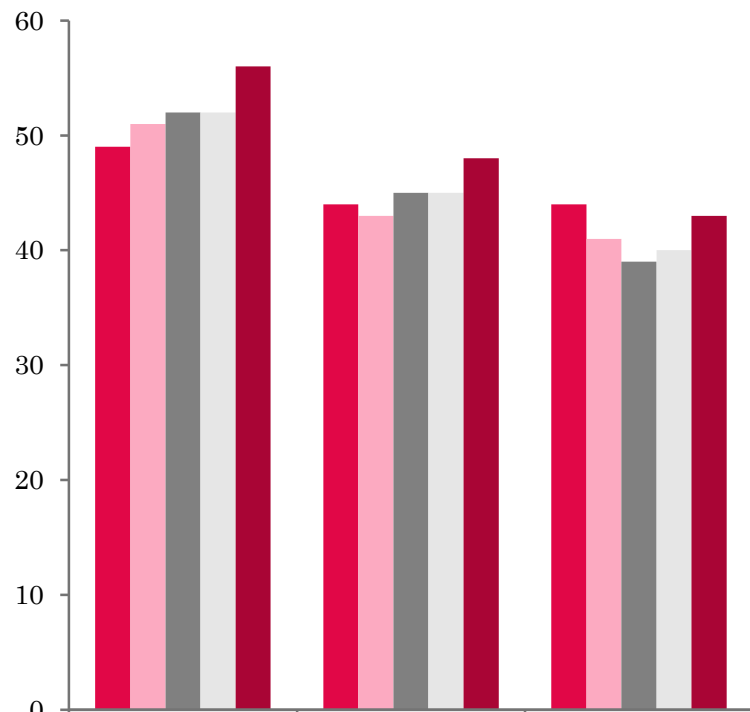
**Table 2: UK/Non UK Occupancy Levels May 2011 – 2013 (see note 5a and 5b Slide 19)**

	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	40	39	43	5	8	7	10	14	13	11	17	14	1719	1629	1520
Northern Ireland	20	21	22	19	21	21	46	42	39	49	50	48	172	166	165
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	373	322	324
Wales	36	37	42	3	3	3	**	**	**	8	8	8	157	148	142
<b>UK</b>	39	38	42	5	8	7	11	15	14	12	17	14	2421	2265	2151

\*\* FIGURES NOT AVAILABLE

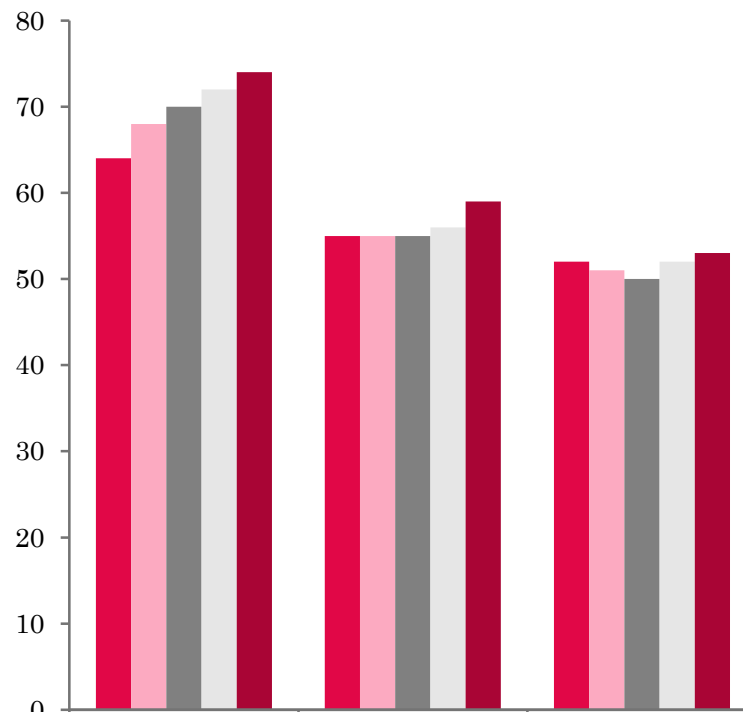


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MAY 2009-2013



	Hotels	Guesthouses	B&Bs
2009	49	44	44
2010	51	43	41
2011	52	45	39
2012	52	45	40
2013	56	48	43

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



	Hotels	Guesthouses	B&Bs
2009	64	55	52
2010	68	55	51
2011	70	55	50
2012	72	56	52
2013	74	59	53



- Across all types of accommodation both room and bed occupancy levels had risen compared to the previous year. The hotel sector witnessed the largest increase, up 4 percentage points for both room and bedspace occupancy. Both Guesthouse and B&B accommodation saw a 3 percentage point rise in bed occupancy (and the same rise in room occupancy for guesthouses). (Table 3).
- With the exception of the 51-100 size band category, all other size bands increased in both measures of occupancy during May 2013 compared to last year. The biggest increase in both room and bed occupancy was in the 4-10 size band, up by 6 pp in both bed and room occupancy compared to 2012. Bedspace occupancy in the 51-100 size band remained on a par with May 2012 whilst room occupancy levels had decreased by 2 percentage points compared with the previous year. (Tables 6 and 7).
- Across all location types, room and bed occupancy levels had risen compared with the previous year with Seaside locations increasing by 9 percentage points in bedspace occupancy and 4pp in room occupancy. Countryside/Village locations witnessed a 6 pp increase in both measures of occupancy on last years results. (Table 8).
- When looking at occupancy levels by tariff, almost all categories had witnessed an increase in both their room and bed occupancy levels compared to May 2012, the exception being in the £30.00-£39.99 tariff band which remained static in both measures of occupancy. The biggest increase in any of the tariff bands was in the £20-00-~£29.99 category rising by 10 percentage points in room occupancy and 8 percentage points in bedspace occupancy.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	52	53	57	71	73	74	1035	998	966
Northern Ireland	43	48	48	61	70	69	68	57	60
Scotland	54	53	57	71	72	75	236	214	218
Wales	46	44	49	64	61	68	83	72	71
<b>UK</b>	52	52	56	70	72	74	1447	1353	1316
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	46	46	49	56	57	60	273	245	216
Northern Ireland	26	32	38	35	45	52	13	24	18
Scotland	49	48	51	60	60	61	63	46	46
Wales	34	30	35	44	41	42	29	31	28
<b>UK</b>	45	45	48	55	56	59	378	346	308
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	40	41	43	51	53	54	411	386	338
Northern Ireland	26	22	25	35	33	34	91	85	87
Scotland	42	43	45	51	53	56	74	62	60
Wales	30	32	40	37	38	46	45	45	43
<b>UK</b>	39	40	43	50	52	53	621	578	528



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: May 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	53	56	60	47	47	49	66	67	71	70	70	70
Northern Ireland	46	50	44	34	40	33	59	65	55	53	62	50
Scotland	56	55	60	48	48	51	66	66	71	67	68	70
Wales	48	46	55	37	37	38	59	55	67	56	56	56
<b>UK</b>	53	55	59	46	46	48	65	66	70	68	69	69



**Table 5: Non-UK Percentages: May 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	11	10	11	17	16	11	15	13	12	18	17
Northern Ireland	44	45	34	53	52	44	48	53	37	55	46	46
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	5	5	7	6	9
<b>UK</b>	9	12	11	12	18	17	11	15	13	13	18	17

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: May 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	37	37	41	227	41	39	45	311	44	42	45	114
Northern Ireland	16	16	19	72	39	30	38	23	29	32	34	27
Scotland	38	41	40	52	51	46	54	65	50	51	56	53
Wales	29	23	38	38	36	38	40	41	41	39	47	27
<b>UK</b>	36	36	40	389	42	40	46	440	44	43	47	221

**Table6: Occupancy Levels by Size: May 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	48	52	58	65	50	57	56	40	54	54	57	763
Northern Ireland	39	37	38	14	40	49	45	18	49	56	55	11
Scotland	53	53	55	56	58	58	60	44	55	54	58	54
Wales	45	44	53	17	44	47	50	11	51	44	47	8
<b>UK</b>	48	51	57	152	50	56	56	113	54	53	57	836

**Table 7: Occupancy Levels by Size: May 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	46	45	49	227	52	50	56	311	57	56	60	114
Northern Ireland	25	26	26	72	44	37	46	23	44	52	51	27
Scotland	47	52	51	52	62	59	63	65	64	65	69	53
Wales	35	28	43	38	46	47	50	41	55	50	58	27
<b>UK</b>	45	44	49	375	53	51	57	440	58	57	61	221

**Table 7: Occupancy Levels by Size: May 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	66	71	74	65	71	75	72	40	77	77	79	763
Northern Ireland	54	65	62	14	61	72	68	18	67	75	74	11
Scotland	67	70	72	56	76	78	79	44	77	78	81	54
Wales	60	63	70	17	67	70	70	11	73	63	73	8
<b>UK</b>	66	70	73	152	71	75	73	113	77	76	79	836



**Table 8: Occupancy Levels by Location Types: May 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	49	44	54	207	54	57	59	585	44	46	48	324	48	46	52	404
Northern Ireland	38	40	42	43	43	49	50	47	30	30	30	51	29	19	25	24
Scotland	52	54	58	43	53	54	58	119	45	45	44	67	51	47	53	95
Wales	45	45	53	36	43	37	48	13	39	44	43	20	39	36	40	73
<b>UK</b>	49	45	54	329	53	55	58	764	44	45	47	462	47	45	51	596

**Table 8: Occupancy Levels by Location Types: May 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	56	58	62	207	75	77	78	585	63	66	67	324	62	60	65	404
Northern Ireland	50	59	55	43	63	72	71	47	40	41	41	51	37	26	38	24
Scotland	66	66	70	43	74	77	79	119	59	60	59	67	61	60	64	95
Wales	59	59	65	36	65	57	69	13	62	63	67	20	48	46	51	73
<b>UK</b>	57	59	63	329	74	75	78	764	62	64	65	462	61	58	64	596



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	**	**	**	**	25	21	29	36	31	30	30	135
Northern Ireland	**	**	**	**	28	22	18	15	23	27	29	39
Scotland	**	**	**	**	32	35	39	20	47	42	40	60
Wales	**	**	**	**	24	14	34	10	33	34	38	43
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>26</b>	<b>23</b>	<b>31</b>	<b>81</b>	<b>33</b>	<b>32</b>	<b>32</b>	<b>277</b>

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	47	46	49	173	49	47	51	84	51	53	56	1062
Northern Ireland	32	32	33	44	45	29	43	15	43	49	49	52
Scotland	50	55	53	39	57	50	60	31	55	54	59	174
Wales	41	40	40	23	51	46	53	15	46	44	50	51
<b>UK</b>	<b>47</b>	<b>47</b>	<b>49</b>	<b>279</b>	<b>50</b>	<b>47</b>	<b>52</b>	<b>145</b>	<b>51</b>	<b>52</b>	<b>56</b>	<b>1339</b>

\*\* FIGURES NOT AVAILABLE

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

**A: Percentage of Bedroom 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	**	**	**	**	35	34	44	36	41	40	41	135
Northern Ireland	**	**	**	**	37	38	26	15	30	36	35	39
Scotland	**	**	**	**	41	46	54	20	59	58	53	60
Wales	**	**	**	**	29	20	41	10	44	43	47	43
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>35</b>	<b>35</b>	<b>45</b>	<b>81</b>	<b>43</b>	<b>43</b>	<b>43</b>	<b>277</b>

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

**B: Percentage of Bedroom 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	56	56	59	173	61	60	61	84	72	73	75	1062
Northern Ireland	51	48	47	44	58	39	59	15	62	72	70	52
Scotland	63	68	66	39	70	65	76	31	72	73	77	174
Wales	55	53	57	23	61	59	67	15	65	62	68	51
<b>UK</b>	<b>57</b>	<b>57</b>	<b>60</b>	<b>279</b>	<b>62</b>	<b>60</b>	<b>64</b>	<b>145</b>	<b>71</b>	<b>72</b>	<b>75</b>	<b>1339</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)

