



# UNITED KINGDOM OCCUPANCY SURVEY

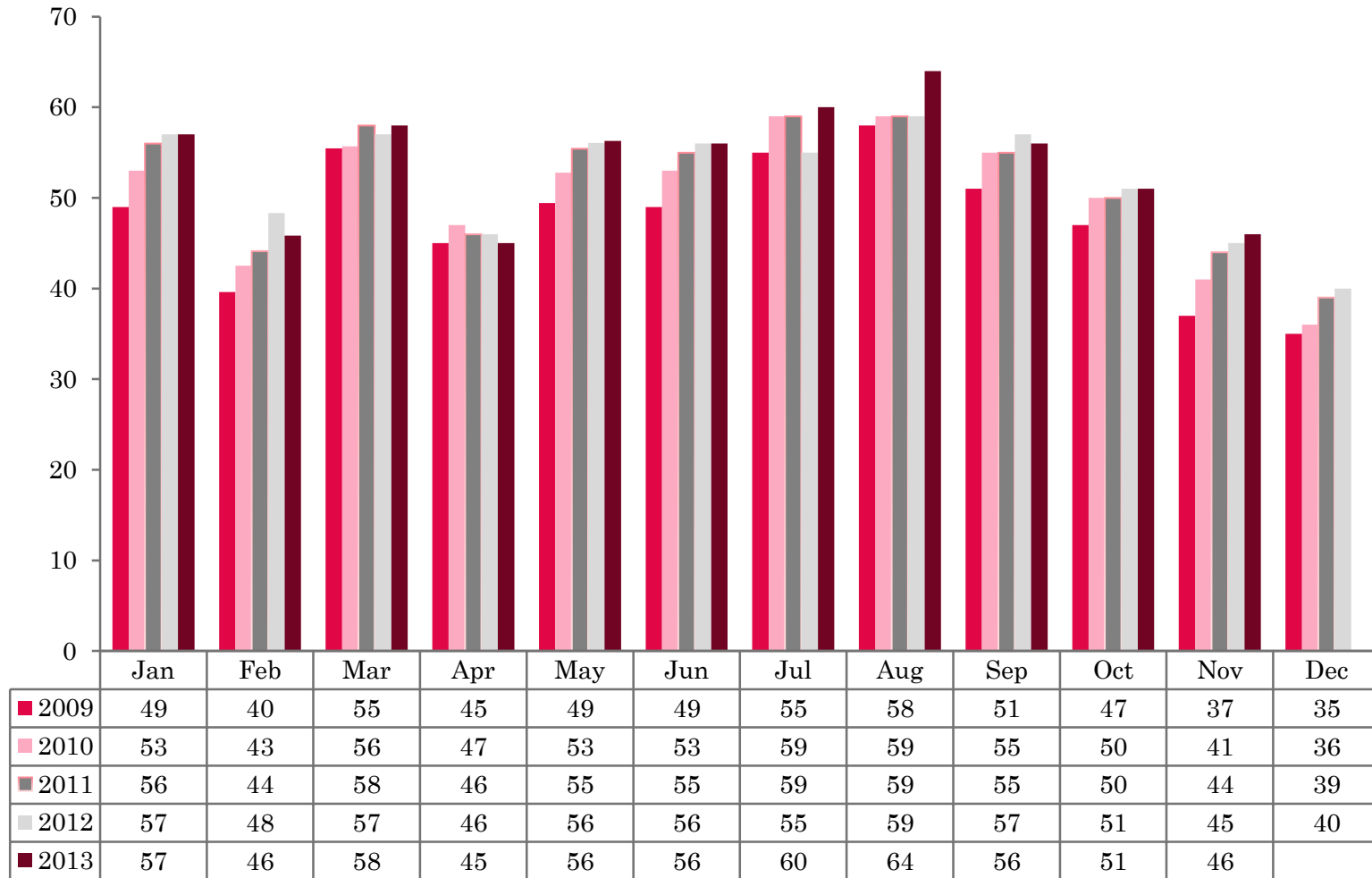
Serviced Accommodation Summary Report  
November 2013

# UK OCCUPANCY SURVEY

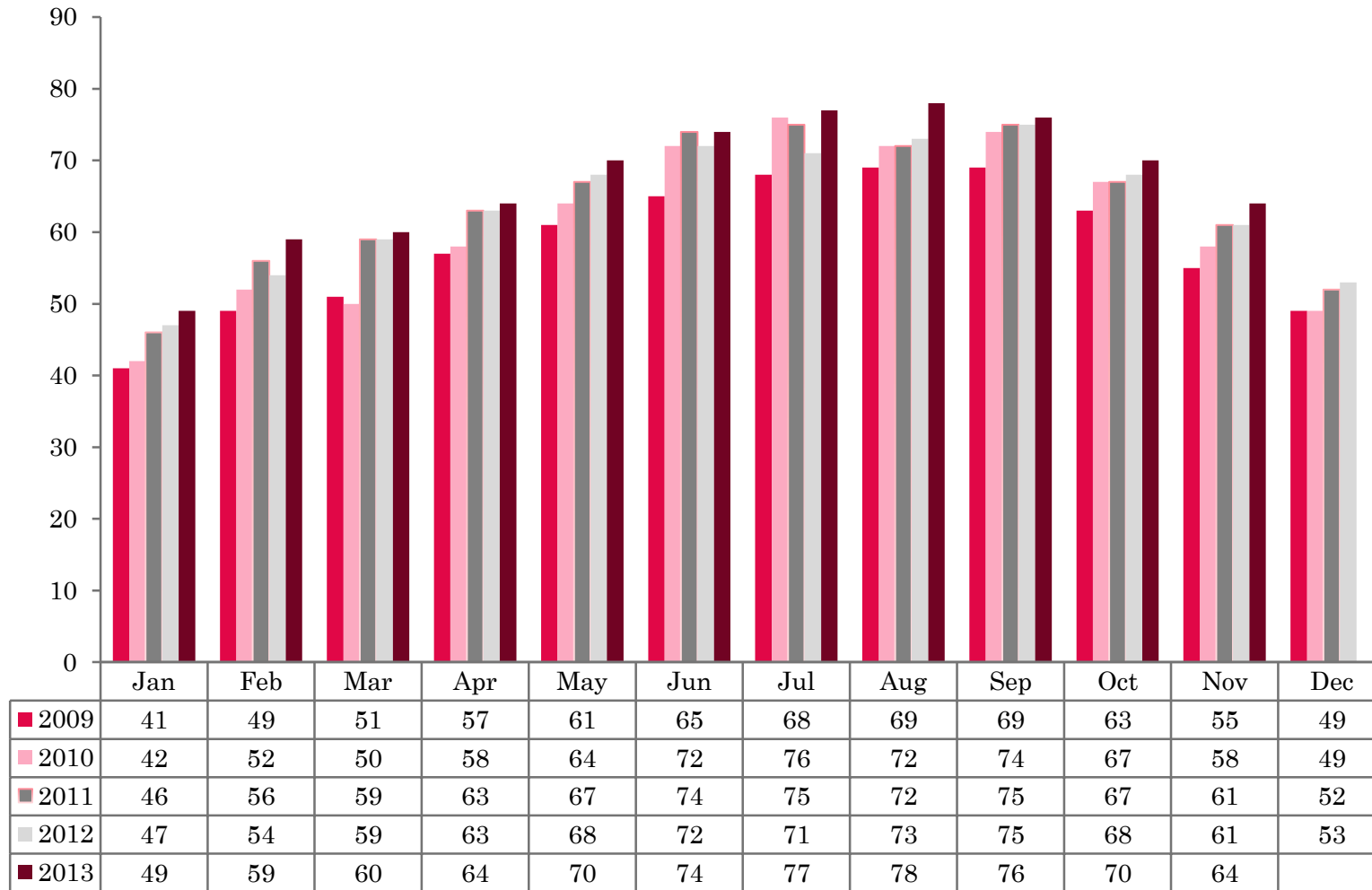
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2009 - 2013



# UK BEDROOM OCCUPANCY 2009 - 2013

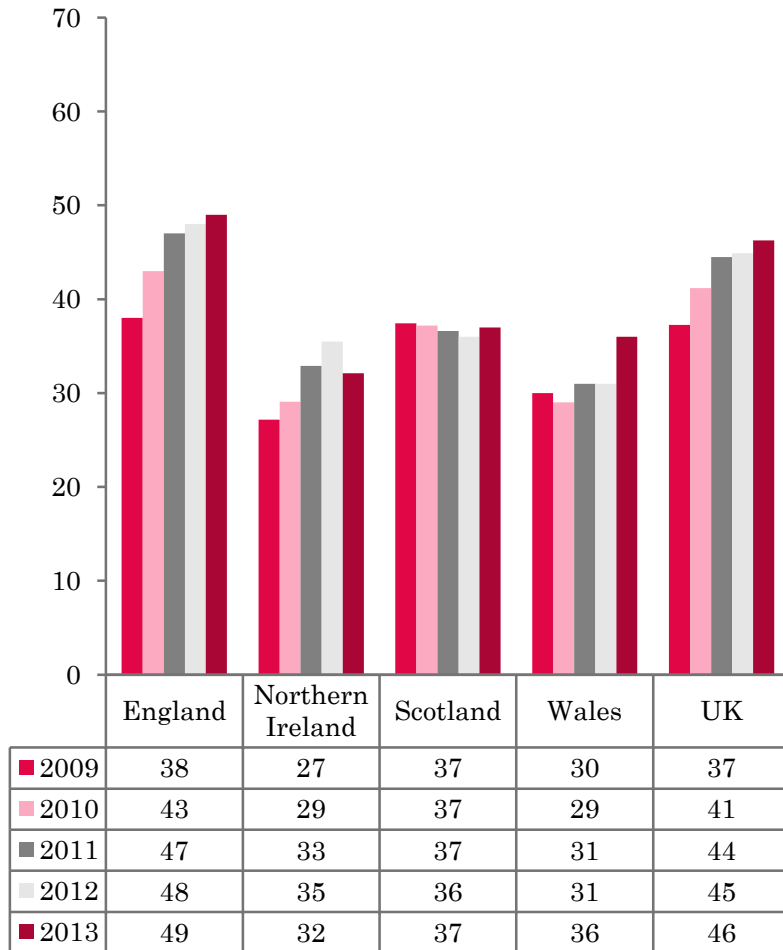


❖ 2,502 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

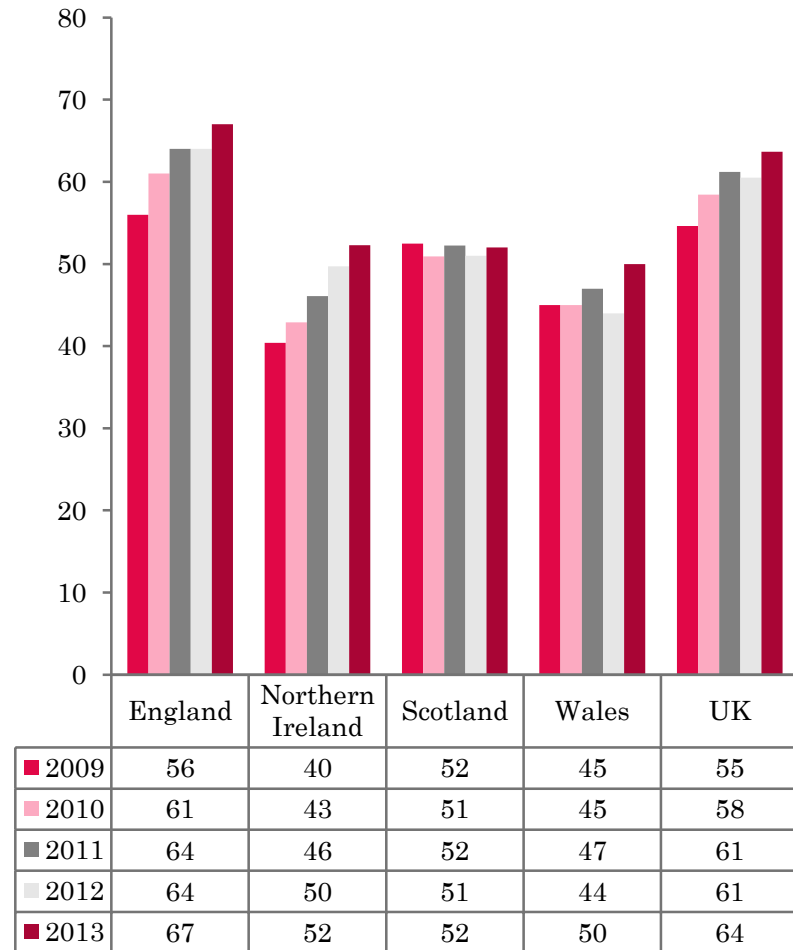
❖ UK bedspace occupancy (46%) had remained flat when compared to November 2012. Room occupancy (64%) rose by 3 percentage points reaching its highest level in November since 2009.



## NATIONAL BEDSPACE OCCUPANCY NOVEMBER 2009-2013



## NATIONAL ROOM OCCUPANCY NOVEMBER 2009-2013



- Bedspace occupancy varied from 49% in England to 32% in Northern Ireland during November 2013.
- In the UK during November 2013, bedspace occupancy remained fairly constant when compared with the previous year whilst bedroom occupancy increased, up 3 percentage points on November 2012.
- Both room and bedspace occupancy in Wales increased significantly in November 2013 compared to the same month the previous year. Bed occupancy was up 5 points and room occupancy up 6 points when compared to November 2012.
- England mirrored the UK in bedspace and room occupancy in November 2013 with bed occupancy remaining flat (+1%), whilst room was up by 3 percentage points.
- There was no change in either measure of occupancy for Scotland with room and bed occupancy levels on a par with the previous year. Bed occupancy in Northern Ireland fell (-3%) when compared with November 2012, whereas room occupancy increased by 2 percentage points.
- Across the UK as a whole, bedspace occupancy by non-UK residents fell by 2 pp when compared with November 2012. England mirrored the UK with a fall of 2, whilst Northern Ireland witnessed the biggest increase of 3 percentage points. Wales remained flat when compared with the previous year. (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data



**Table 1: Occupancy Levels: November 2011 - 2013**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	47	48	49	64	64	67	1640	1533	1925
Northern Ireland	33	35	32	46	50	52	156	144	155
Scotland	37	36	37	52	51	52	300	297	292
Wales	31	31	36	47	44	50	147	110	130
<b>UK</b>	44	45	46	61	61	64	2243	2084	2502

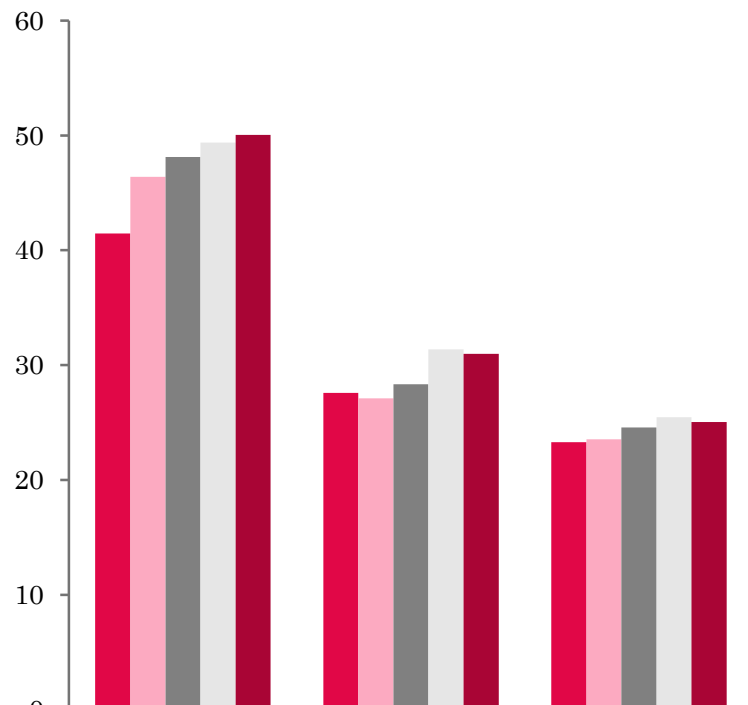
**Table 2: UK/Non UK Occupancy Levels November 2011 – 2013 (see note 5a and 5b Slide 19)**

	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	35	33	32	6	5	3	12	9	6	15	13	8	1640	1533	1925
Northern Ireland	17	19	13	16	16	19	46	52	68	48	46	59	156	144	155
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	300	297	292
Wales	26	28	29	1	1	1	**	**	**	5	3	3	147	110	130
<b>UK</b>	34	32	31	6	5	3	13	10	8	15	13	9	2243	2084	2502

\*\* FIGURES NOT AVAILABLE

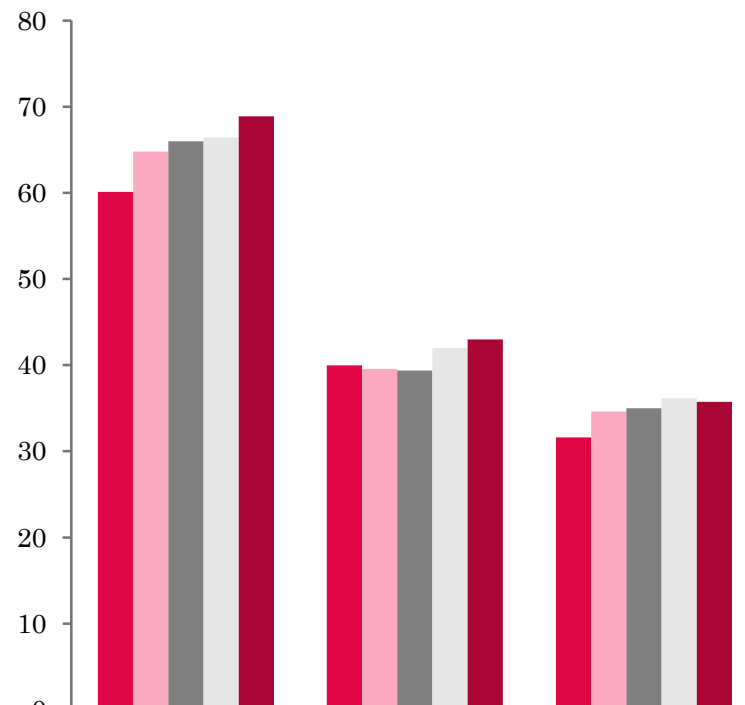


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION NOVEMBER 2009-2013

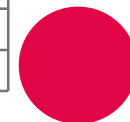


	Hotels	Guesthouses	B&Bs
2009	41	28	23
2010	46	27	24
2011	48	28	25
2012	49	31	25
2013	50	31	25

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



	Hotels	Guesthouses	B&Bs
2009	60	40	32
2010	65	40	35
2011	66	39	35
2012	66	42	36
2013	69	43	36



- There was very little change year on year across the accommodation sectors during November 2013. Both Guesthouse and B&B accommodation had remained flat in both measures of occupancy during this month and Hotels saw a small increase in both bedroom occupancy and bedspace occupancy. (Table 3).
- Bedspace occupancy in four out of the six size bandings were higher than in November 2012. The biggest increase in bedspace occupancy was found in the 11-25 size banding where occupancy levels rose by 5 percentage points when compared to the previous year. The 4-10 size band increased by 3 percentage points but the remaining size bands had remained flat or in the case of the 51-100 size band, fallen by 10 pp. Room occupancy in five out of the six size bandings witnessed an increase when compared to 2012. The 4-10, 11-25 and >100 all increased by 3 percentage points compared with the previous year, with the 1-3 and 26-50 also increasing by 2 percentage points, whilst the 51-100 category remained static (Tables 6 and 7).
- Both room and bed occupancy increased across nearly all locations when compared with the same period in 2012. The exception being bedspace occupancy in the City/large town's category and Countryside/village where levels remained static with November 2012. Seaside locations had the highest increase in bedspace occupancy rising by 3 percentage points compared with 2012. City/large town saw the highest increase in room occupancy, rising by 6 percentage points in November 2013 when compared to 2012 data. (Table 8).
- When looking at bedspace and room occupancy levels by tariff, only the 20-29 category witnessed a downturn in both bedspace and room occupancy compared to 2012. In contrast to this both the £40.00-£49.99 and £50.00-£59.99 saw an increase in both measures of occupancy with the 50-59 tariff band increasing by 4 percentage points in bedspace occupancy and by 8 percentage points in room occupancy. The £30.00-£39.99 and >£60.00 had remained flat in both bed and room occupancy when compared with the previous year.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	50	52	52	68	69	71	1041	986	1471
Northern Ireland	39	43	38	54	59	61	67	51	70
Scotland	42	42	44	60	60	62	215	214	211
Wales	38	37	42	56	53	59	81	59	70
UK	48	49	50	66	66	69	1404	1310	1822
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	31	35	34	43	47	47	234	205	172
Northern Ireland	17	37	29	24	45	42	12	18	12
Scotland	20	19	20	28	25	29	37	38	34
Wales	14	14	16	20	19	21	26	22	22
UK	28	31	31	39	42	43	309	283	240
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	27	28	27	39	40	39	365	342	282
Northern Ireland	12	12	8	18	18	19	77	82	73
Scotland	15	18	19	21	25	25	48	45	47
Wales	16	16	19	16	21	23	40	29	38
UK	25	25	25	35	36	36	530	498	440



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: November 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	51	50	52	44	44	45	60	61	64	66	67	70
Northern Ireland	38	43	34	26	27	20	53	52	52	44	43	42
Scotland	40	40	41	33	33	34	48	49	50	52	53	55
Wales	36	33	40	28	28	32	45	42	49	48	45	51
<b>UK</b>	48	47	49	41	41	42	57	58	61	63	63	66



**Table 5: Non-UK Percentages: November 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	10	8	5	14	10	7	13	14	7	16	16	10
Northern Ireland	47	54	36	46	59	39	52	47	34	53	52	35
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	3	3	3	6	4	4
<b>UK</b>	11	9	6	15	11	8	13	14	7	16	16	10

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: November 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	21	22	24	182	27	28	30	255	37	36	41	105
Northern Ireland	9	10	8	62	13	21	17	15	23	25	24	28
Scotland	13	15	15	40	22	22	25	53	36	35	34	49
Wales	11	12	15	32	21	20	24	38	35	28	39	22
<b>UK</b>	19	20	22	316	26	26	29	361	37	35	40	204

**Table6: Occupancy Levels by Size: November 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	44	48	48	64	54	60	47	36	52	53	54	1283
Northern Ireland	24	28	24	18	36	42	36	22	47	49	45	10
Scotland	37	38	38	54	49	49	52	40	49	50	51	56
Wales	34	41	39	21	45	45	43	10	39	39	51	7
<b>UK</b>	42	46	46	157	53	57	47	108	51	52	53	1356



**Table 7: Occupancy Levels by Size: November 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	30	30	33	182	38	38	41	255	52	53	57	105
Northern Ireland	15	16	14	62	18	25	34	15	38	37	33	28
Scotland	18	22	23	40	31	29	33	53	48	47	45	49
Wales	14	17	20	32	27	26	29	38	50	38	51	22
<b>UK</b>	27	28	30	375	36	36	39	361	51	51	54	204

**Table 7: Occupancy Levels by Size: November 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	56	64	66	64	69	68	66	36	76	75	78	1283
Northern Ireland	47	44	48	18	57	51	58	22	55	70	71	10
Scotland	53	53	57	54	68	69	73	40	72	73	74	56
Wales	50	57	58	21	68	63	61	10	62	60	73	7
<b>UK</b>	55	62	64	157	69	67	67	108	74	74	77	1356



**Table 8: Occupancy Levels by Location Types: November 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
<b>England</b>	37	39	42	188	54	58	57	1000	40	41	43	396	39	37	37	341
<b>Northern Ireland</b>	23	24	24	36	40	43	40	53	22	28	21	42	11	15	11	24
<b>Scotland</b>	33	31	29	33	44	47	51	118	28	26	27	62	28	27	25	79
<b>Wales</b>	38	37	37	35	35	37	51	12	33	34	28	17	24	21	27	66
<b>UK</b>	36	37	40	292	51	55	55	1183	38	38	39	517	36	34	34	510

**Table 8: Occupancy Levels by Location Types: November 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
<b>England</b>	49	51	55	188	72	73	79	1000	56	61	64	396	53	50	51	341
<b>Northern Ireland</b>	33	32	33	36	54	65	65	53	33	31	33	42	17	22	21	24
<b>Scotland</b>	40	43	38	33	66	69	72	118	42	40	42	62	36	35	34	79
<b>Wales</b>	52	48	48	35	58	58	74	12	50	53	43	17	32	28	37	66
<b>UK</b>	48	49	52	292	70	71	77	1183	53	57	59	517	49	46	47	510



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

**A: Percentage of Bedspace 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	**	**	**	**	19	28	23	29	22	21	21	117
Northern Ireland	**	**	**	**	14	12	7	24	11	10	9	30
Scotland	**	**	**	**	14	23	21	16	21	20	21	53
Wales	**	**	**	**	10	15	10	6	20	19	21	39
<b>UK</b>	**	**	**	**	18	26	22	75	22	20	21	239

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

**B: Percentage of Bedspace 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	29	29	32	132	37	36	39	76	49	52	51	1536
Northern Ireland	26	24	42	28	29	40	34	23	40	43	35	50
Scotland	28	24	28	42	38	34	44	42	45	46	45	139
Wales	26	23	27	17	51	42	39	20	35	36	42	48
<b>UK</b>	29	28	31	219	38	36	40	161	47	50	49	1773

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	**	**	**	**	33	40	32	29	34	31	31	117
Northern Ireland	**	**	**	**	23	17	24	24	17	15	14	30
Scotland	**	**	**	**	19	30	32	16	34	31	33	53
Wales	**	**	**	**	15	20	16	6	26	26	27	39
<b>UK</b>	**	**	**	**	30	37	31	75	33	30	31	239

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	37	37	42	132	50	48	54	76	68	70	71	1536
Northern Ireland	39	36	58	28	45	47	63	23	54	61	57	50
Scotland	44	37	42	42	51	50	64	42	61	63	62	139
Wales	33	32	37	17	61	50	52	20	55	53	60	48
<b>UK</b>	38	37	42	219	51	48	56	161	66	68	69	1773

\*\* 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)

