



UNITED KINGDOM OCCUPANCY SURVEY

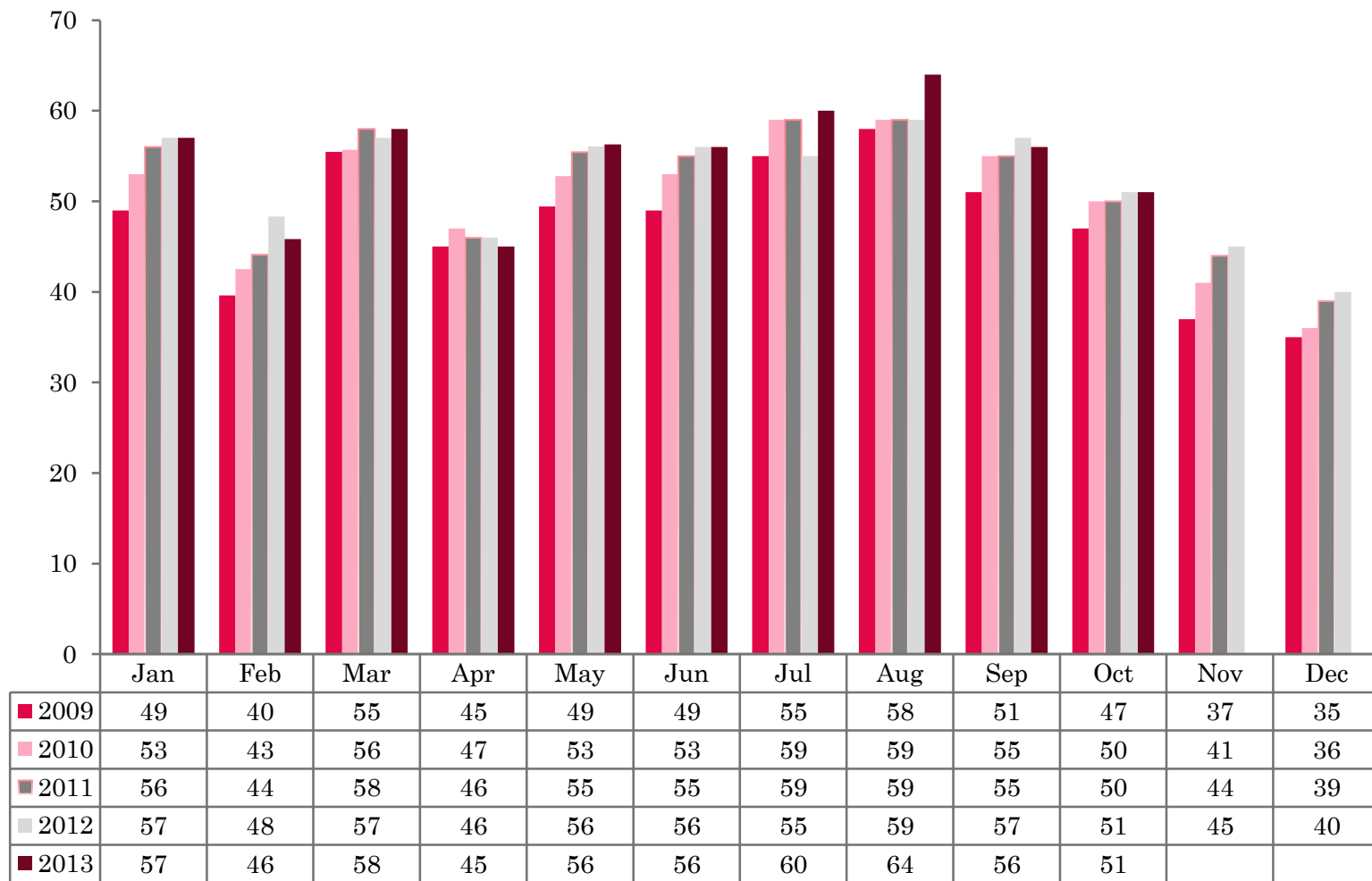
Serviced Accommodation Summary Report
October 2013

UK OCCUPANCY SURVEY

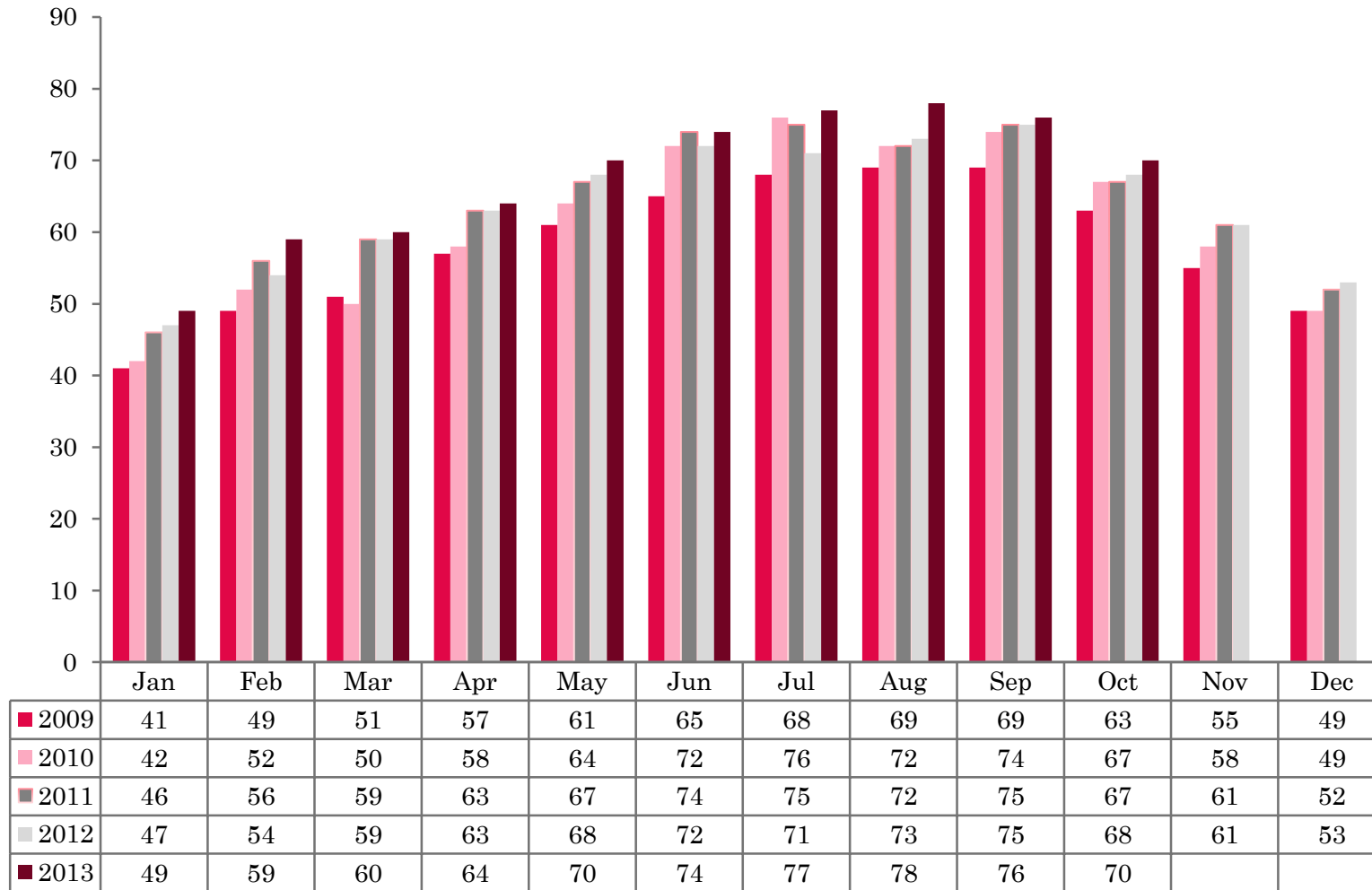
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2009 - 2013



UK BEDROOM OCCUPANCY 2009 - 2013

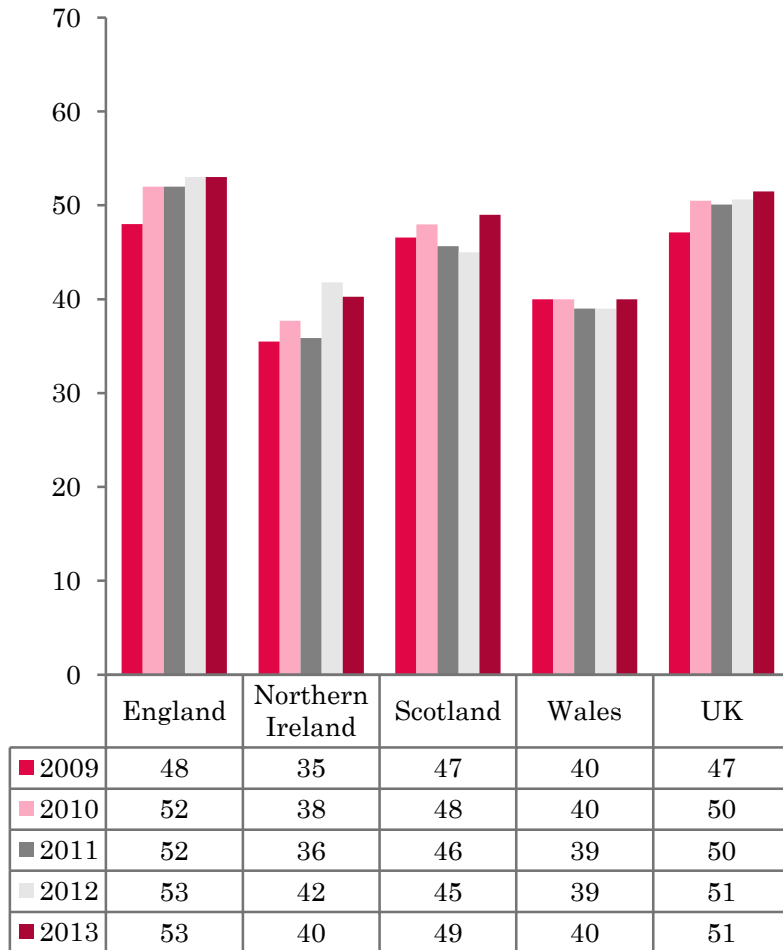


- ❖ 2,607 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

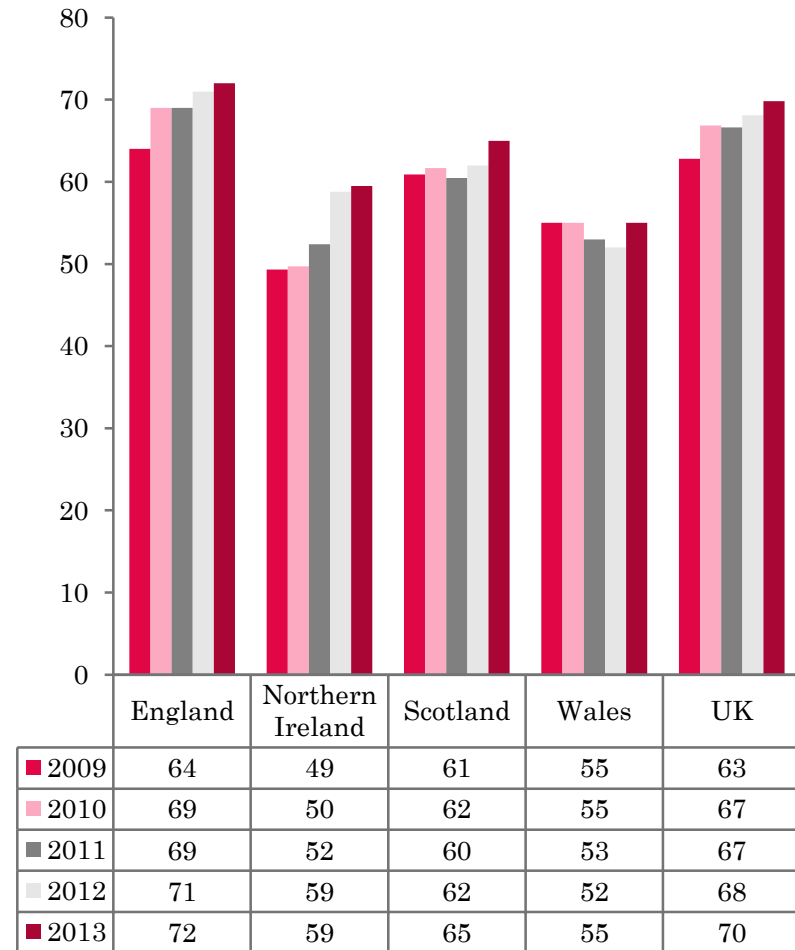
- ❖ UK bedspace occupancy (51%) had remained flat when compared to October 2012. Room occupancy rose by 2 percentage points, reaching its highest level in October since 2009.



NATIONAL BEDSPACE OCCUPANCY OCTOBER 2009-2013



NATIONAL ROOM OCCUPANCY OCTOBER 2009-2013



- Bedspace occupancy varied from 53% in England to 40% in Northern Ireland and Wales during October 2013.
- In the UK during October 2013, both bedspace occupancy remained flat when compared with the previous year whilst bedroom occupancy rose slightly, up 2 percentage points on October 2012.
- Bedspace occupancy in Wales remained on a par with October 2012 but room occupancy levels increased by 3 percentage points in comparison to the previous year.
- England mirrored the UK in bedspace and room occupancy in October 2013 with both measures of occupancy on a par with the previous year.
- When comparing the four national boards, Scotland saw an increase in both measures of room and bedspace occupancy (up 4 and 3 percentage points respectively).
- Bed occupancy in Northern Ireland fell by 2 percentage points during October 2013, whilst room occupancy stayed flat compared with October 2012.
- Across the UK as a whole, there was little difference in bedspace occupancy by non-UK residents compared with October 2012. Once again, England and Wales remained at the same level as the previous year, whilst Northern Ireland remained flat (+1%) (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: October 2011 - 2013

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	52	53	53	69	71	72	1715	1580	1998
Northern Ireland	36	42	40	52	59	59	154	173	166
Scotland	46	45	49	60	62	65	332	307	302
Wales	39	39	40	53	52	55	159	134	141
UK	50	51	51	67	68	70	2360	2194	2607

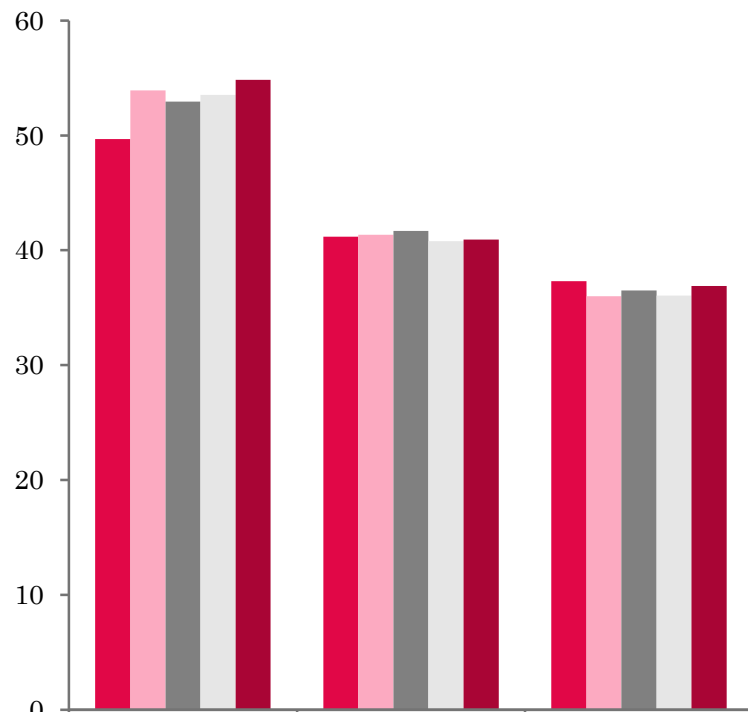
Table 2: UK/Non UK Occupancy Levels October 2011 – 2013 (see note 5a and 5b Slide 19)

	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	39	41	40	6	6	6	11	9	12	13	12	14	1715	1580	1998
Northern Ireland	17	20	17	19	22	23	31	30	40	52	53	58	154	173	166
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	332	307	302
Wales	35	35	35	2	2	2	**	**	**	5	4	6	159	134	141
UK	38	40	39	6	6	6	11	10	13	13	12	15	2360	2194	2607

** FIGURES NOT AVAILABLE

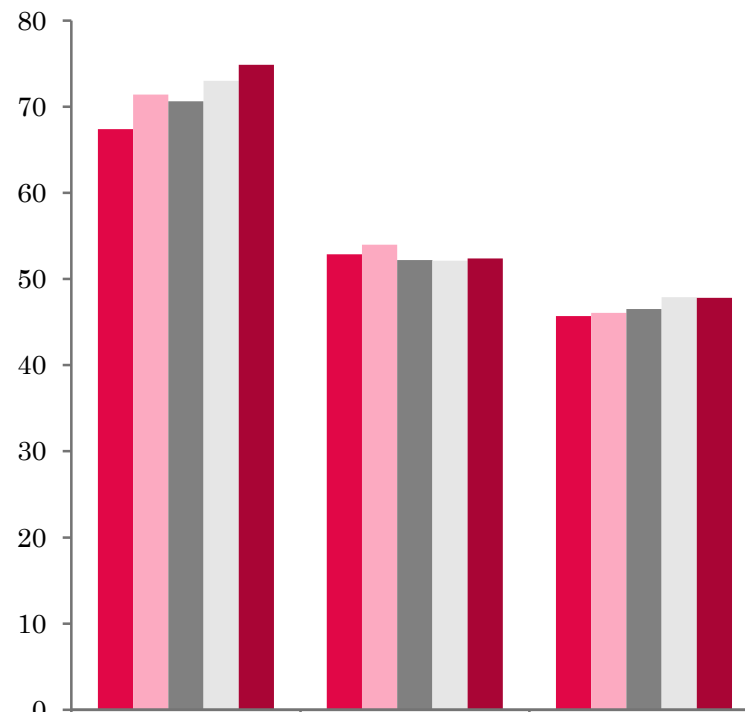


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION OCTOBER 2009-2013

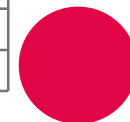


	Hotels	Guesthouses	B&Bs
2009	50	41	37
2010	54	41	36
2011	53	42	37
2012	54	41	36
2013	55	41	37

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



	Hotels	Guesthouses	B&Bs
2009	67	53	46
2010	71	54	46
2011	71	52	47
2012	73	52	48
2013	75	52	48



- There was very little change year on year across the accommodation sectors during October 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 bedroom occupancy and remained flat in bedspace occupancy. (Table 3).
- Bedspace occupancy in three out of the six size bandings were higher than in October 2012. The biggest increase in bedspace occupancy was found in the 4-10 and 11-25 size banding where occupancy rose by 3 percentage points respectively when compared to the previous year. The 26-50 size band increased by 2 percentage points but the remaining size bands had remained flat or in the case of the 51-100 size band, fallen by 3 pp. Room occupancy followed a similar pattern with the 4-10, 11-25 and the >100 size band categories witnessing an increase, all other size bandings saw a small decrease or levels remaining static compared with the same period in 2012. (Tables 6 and 7).
- There was very little change across the majority of locations when compared with the same period the previous year, with both bedspace and room occupancy remaining flat during this period. The exception being with City/large town's where room occupancy levels saw an increase of 5 percentage points and Countryside/village increasing by 2 percentage points when compared with October 2012. (Table 8).
- When looking at bedspace occupancy levels by tariff, three out of the five tariff bands had remained on a par in both measures of occupancy. Bedspace Occupancy in the £50-£59.99 has risen by 2 pp and the £30.00-£39.99 tariff band had fallen by the same amount. Both the £40.00-£49.99 and the >£60 tariff band had witnessed a small increase in room occupancy of 2 percentage points respectively.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	54	55	56	72	75	76	1052	997	1488
Northern Ireland	41	46	47	60	65	70	63	63	70
Scotland	52	51	53	68	70	73	223	216	211
Wales	45	45	46	61	60	65	83	76	77
UK	53	54	55	71	73	75	1421	1352	1846
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	45	44	43	56	56	56	256	225	198
Northern Ireland	19	52	33	30	63	44	13	9	17
Scotland	33	32	38	42	42	43	51	41	38
Wales	23	21	22	31	28	29	28	24	22
UK	42	41	41	52	52	52	348	299	275
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	39	38	38	50	51	50	407	358	312
Northern Ireland	21	21	15	29	28	23	78	101	79
Scotland	28	32	39	37	42	46	58	50	53
Wales	27	28	23	26	32	30	48	34	42
UK	37	36	37	47	48	48	591	543	486



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: October 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	56	57	57	49	49	50	66	69	69	70	72	74
Northern Ireland	42	49	46	29	36	37	56	61	61	48	57	58
Scotland	48	49	53	44	43	47	58	60	64	63	64	66
Wales	44	45	46	35	35	35	53	54	58	54	51	54
UK	54	55	56	47	47	48	64	66	68	68	69	71



Table 5: Non-UK Percentages: October 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	11	10	11	16	15	16	13	14	14	15	17	17
Northern Ireland	29	33	39	41	43	49	45	53	38	52	60	45
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	6	5	8	7	8	10
UK	11	11	12	17	16	17	13	14	14	15	17	17

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Table 6: Occupancy Levels by Size: October 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	33	33	32	211	42	38	40	287	47	46	49	113
Northern Ireland	12	18	12	64	27	26	32	22	28	30	28	26
Scotland	24	30	30	44	37	34	45	57	50	47	49	50
Wales	20	17	23	35	33	31	30	40	43	36	35	26
UK	31	31	31	354	41	37	40	406	47	45	48	215

Table6: Occupancy Levels by Size: October 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	53	56	57	65	53	58	53	40	56	56	56	1282
Northern Ireland	32	31	29	21	41	47	45	23	47	56	58	10
Scotland	46	47	50	56	55	54	58	39	56	56	57	56
Wales	41	46	44	22	45	51	54	10	48	48	53	8
UK	51	53	55	164	53	57	54	112	55	55	56	1356



Table 7: Occupancy Levels by Size: October 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	41	42	40	211	53	49	51	287	60	61	64	113
Northern Ireland	21	27	18	64	34	30	39	22	42	43	41	26
Scotland	33	40	39	44	46	47	51	57	62	60	61	50
Wales	24	22	29	35	38	39	36	40	54	47	47	26
UK	39	40	39	375	51	48	50	406	60	59	62	215

Table 7: Occupancy Levels by Size: October 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	66	72	72	65	69	75	71	40	78	80	81	1282
Northern Ireland	52	55	59	21	61	65	64	23	66	74	82	10
Scotland	60	66	68	56	73	74	78	39	77	80	83	56
Wales	57	60	60	22	67	71	74	10	67	66	82	8
UK	64	70	71	164	69	74	72	112	77	79	81	1356



Table 8: Occupancy Levels by Location Types: October 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	45	48	46	210	58	59	60	1009	46	47	47	401	48	46	47	378
Northern Ireland	34	35	50	38	40	47	31	56	28	28	32	45	18	27	14	29
Scotland	48	42	49	39	52	52	56	118	37	41	38	61	40	38	44	84
Wales	45	41	43	36	41	43	52	12	37	41	38	19	35	34	32	74
UK	45	46	46	323	56	57	58	1195	44	45	45	526	46	44	45	565

Table 8: Occupancy Levels by Location Types: October 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	54	61	59	210	76	78	83	1009	65	68	69	401	61	60	63	378
Northern Ireland	43	46	75	38	61	69	39	56	36	35	43	45	32	38	25	29
Scotland	58	56	60	39	71	75	78	118	50	57	59	61	52	50	52	84
Wales	58	52	55	36	62	63	80	12	59	61	54	19	40	42	42	74
UK	55	59	59	323	74	76	81	1195	62	65	66	526	58	57	59	565

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	**	**	**	**	34	38	36	33	39	32	31	124
Northern Ireland	**	**	**	**	23	22	17	26	16	31	14	32
Scotland	**	**	**	**	22	31	36	17	33	32	30	51
Wales	**	**	**	**	17	17	17	8	27	29	24	41
UK	**	**	**	**	31	35	35	84	37	32	30	248

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	40	42	43	161	49	47	47	86	54	55	55	1556
Northern Ireland	35	29	26	31	20	33	43	23	41	48	48	54
Scotland	38	38	38	40	51	46	55	35	54	53	56	159
Wales	43	36	28	19	51	44	45	19	43	45	48	54
UK	40	41	41	251	49	46	48	163	53	54	55	1823

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 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	**	**	**	**	42	47	47	33	49	42	42	124
Northern Ireland	**	**	**	**	31	32	23	26	25	41	20	32
Scotland	**	**	**	**	29	46	45	17	46	47	49	51
Wales	**	**	**	**	19	23	22	8	34	37	27	41
UK	**	**	**	**	39	45	45	84	47	42	42	248

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 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	49	52	54	161	62	61	59	86	72	75	76	1556
Northern Ireland	50	41	37	31	36	45	64	23	61	67	72	54
Scotland	52	50	53	40	65	65	70	35	70	72	74	159
Wales	52	46	44	19	61	55	58	19	60	61	68	54
UK	50	51	53	251	62	61	61	163	71	73	75	1823

** 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)

