



UNITED KINGDOM OCCUPANCY SURVEY

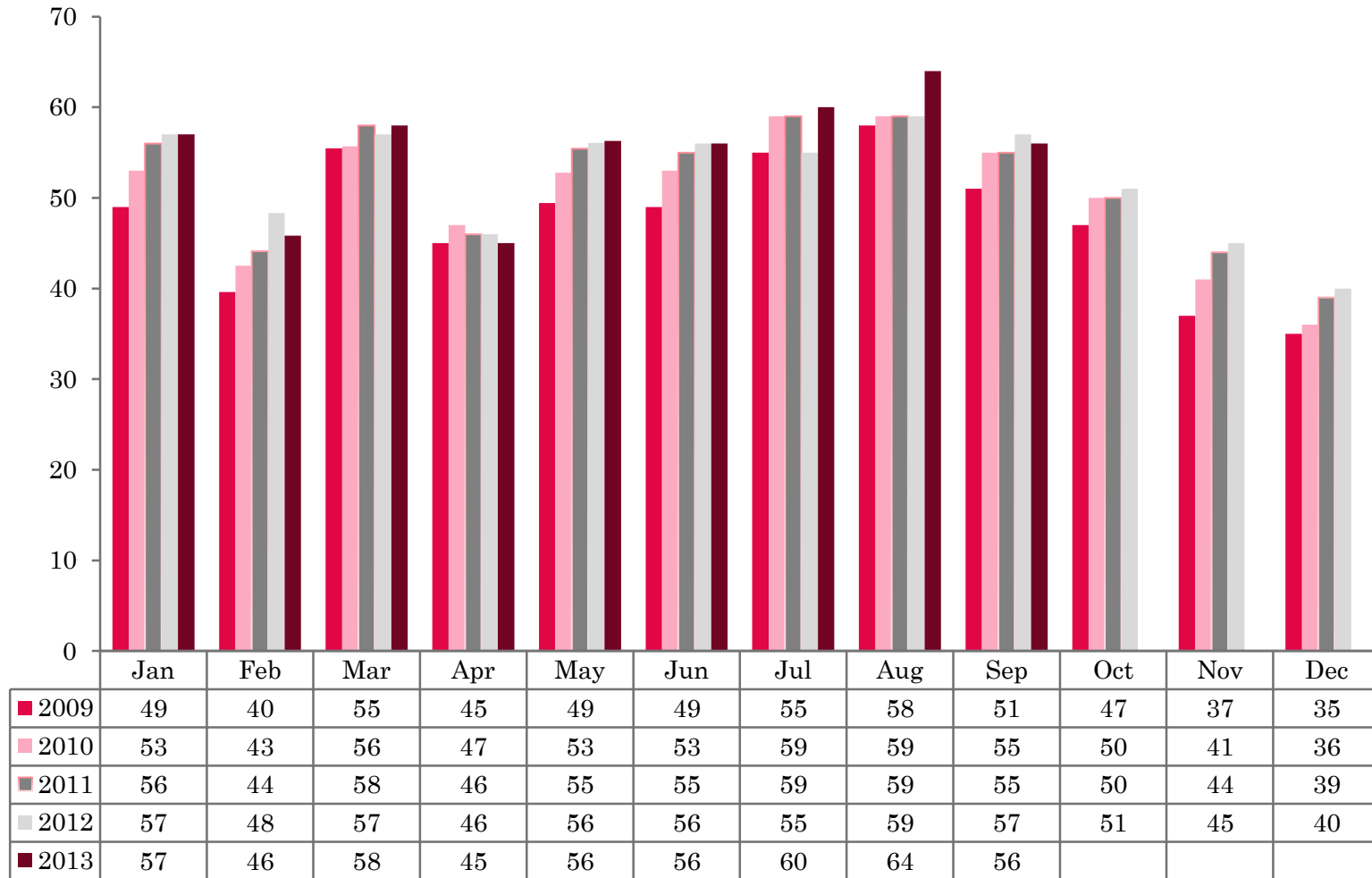
Serviced Accommodation Summary Report
September 2013

UK OCCUPANCY SURVEY

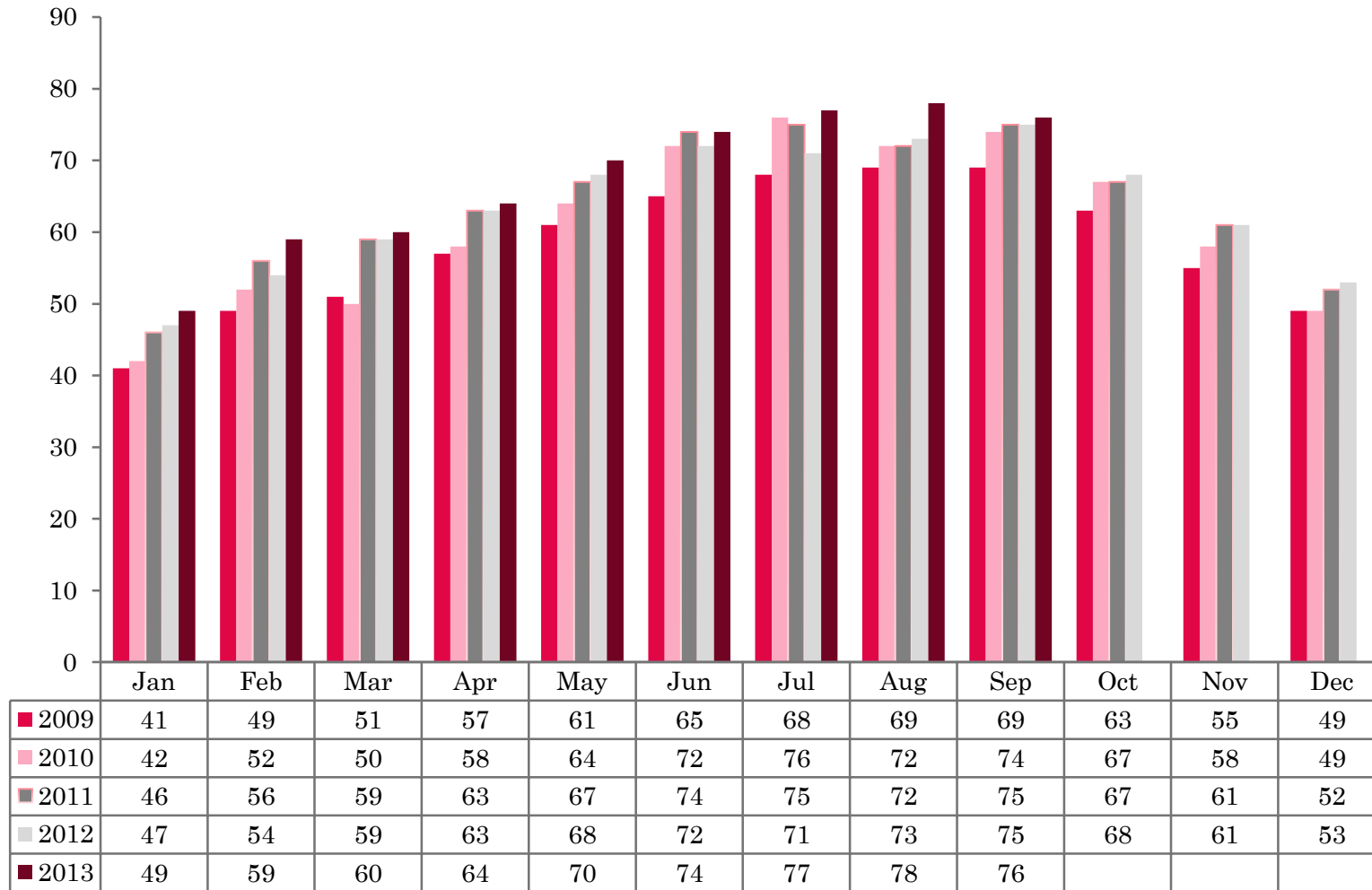
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2009 - 2013



UK BEDROOM OCCUPANCY 2009 - 2013

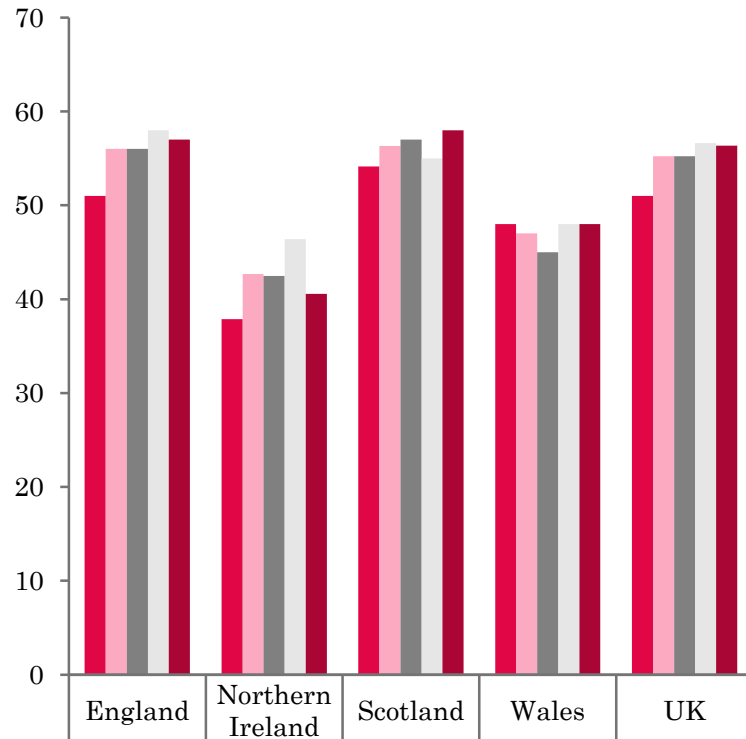


❖ 2,642 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

❖ Both UK bedspace occupancy (56%) and bedroom occupancy had remained flat when compared to September 2012, although room occupancy was at its highest level in September since 2009.



NATIONAL BEDSPACE OCCUPANCY SEPTEMBER 2009-2013



	England	Northern Ireland	Scotland	Wales	UK
2009	51	38	54	48	51
2010	56	43	56	47	55
2011	56	42	57	45	55
2012	58	46	55	48	57
2013	57	41	58	48	56

NATIONAL ROOM OCCUPANCY SEPTEMBER 2009-2013



	England	Northern Ireland	Scotland	Wales	UK
2009	69	55	70	64	69
2010	75	60	72	62	74
2011	76	60	74	62	75
2012	77	67	73	65	75
2013	77	66	76	63	76



- Bedspace occupancy varied from 57% in England to 41% in Northern Ireland during September 2013.
- In the UK during September 2013, both bedspace and room occupancy stayed flat when compared with the previous year (-1%).
- Bedspace occupancy in Wales remained static in September 2013 when compared to last years results. Room occupancy levels dropped by 2 percentage points in comparison to September 2012 data.
- England mirrored the UK in bedspace and room occupancy in September 2013 with both measures of occupancy on a par with the previous year (-1%).
- When compared with September 2012, Scotland had saw an increase in both measures of room and bedspace occupancy (up 3 percentage points respectively).
- Bed occupancy in Northern Ireland fell by 5 percentage points during September 2013, whilst room occupancy was on a par with September 2012.
- Across the UK as a whole, there was little difference in bedspace occupancy by non-UK residents compared with September 2012 (-1%). England mirrored the UK level, Northern Ireland fell by 3 percentage points and Wales was on a par with 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: September 2011 - 2013

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	56	58	57	76	77	77	1743	1591	2014
Northern Ireland	42	46	41	60	67	66	170	175	181
Scotland	57	55	58	74	73	76	346	329	306
Wales	45	48	48	62	65	63	162	138	141
UK	55	57	56	75	75	76	2421	2233	2642

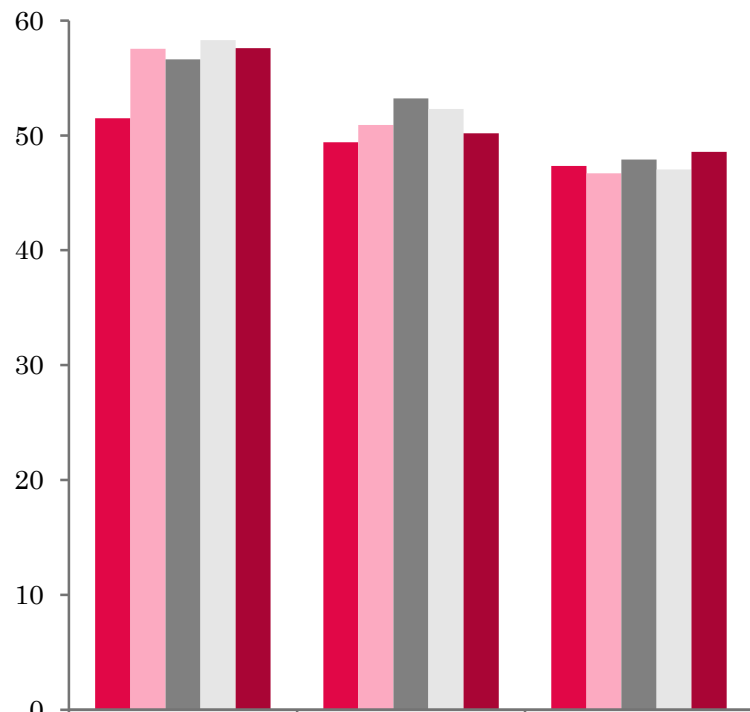
Table 2: UK/Non UK Occupancy Levels September 2011 – 2013 (see note 5a and 5b Slide 19)

	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	48	47	47	8	9	8	13	12	13	14	15	14	1743	1591	2014
Northern Ireland	24	23	21	18	23	20	31	36	43	43	50	49	170	175	181
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	346	329	306
Wales	42	44	43	3	3	4	**	**	**	7	7	9	162	138	141
UK	47	46	46	8	9	8	13	13	14	14	15	15	2421	2233	2642

** FIGURES NOT AVAILABLE

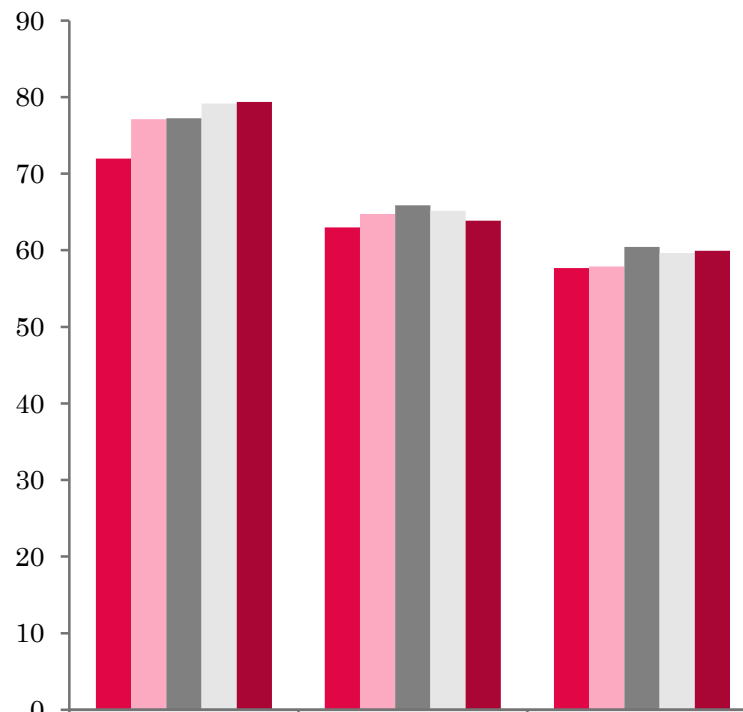


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION SEPTEMBER 2009-2013



	Hotels	Guesthouses	B&Bs
2009	51	49	47
2010	58	51	47
2011	57	53	48
2012	58	52	47
2013	58	50	49

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



	Hotels	Guesthouses	B&Bs
2009	72	63	58
2010	77	65	58
2011	77	66	60
2012	79	65	60
2013	79	64	60



- There was a mixed picture across the accommodation sectors during September 2013. Hotels were at the same level for both bedspace and room occupancy. Guesthouse accommodation had fallen for both measures of occupancy during this month and B&B's saw an increase in bedspace occupancy and remained flat in room occupancy. (Table 3).
- Bedspace occupancy in three out of the six size bandings were higher than that of the previous year. The biggest increase in bedspace occupancy was found in the 1-3 size banding where occupancy rose by 2 percentage points when compared to September 2012. Room occupancy was more varied with only the 4-10 and >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). The 51-100 size band witnessed the largest decrease, falling by 6 percentage points in both bedspace and room occupancy.
- 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 2 percentage points when compared with September 2012. (Table 8).
- When looking at occupancy levels by tariff, all tariff bands had either witnessed a fall, or remained on a par in both measures of occupancy. Bedspace Occupancy in the £20-£29.99 and the £40-£49.99 tariff band had seen the biggest decrease, falling by 3 and 4 percentage points respectively.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	57	59	58	78	80	80	1056	995	1482
Northern Ireland	47	52	46	68	76	75	68	63	75
Scotland	59	58	59	78	79	80	230	223	212
Wales	49	53	52	68	71	70	82	70	74
UK	57	58	58	77	79	79	1436	1351	1843
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	55	54	50	68	67	65	261	233	206
Northern Ireland	24	44	42	37	59	55	15	17	18
Scotland	54	52	56	66	64	65	54	46	41
Wales	36	37	39	47	49	47	31	26	24
UK	53	52	50	66	65	64	361	322	289
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
England	49	49	49	62	63	61	426	363	326
Northern Ireland	29	26	20	37	35	30	87	95	88
Scotland	49	47	55	61	55	64	62	60	53
Wales	36	32	35	45	40	44	49	42	43
UK	48	47	49	60	60	60	624	560	510



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: September 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	59	61	59	54	55	54	72	73	72	79	80	80
Northern Ireland	47	50	47	36	42	36	60	66	70	56	66	63
Scotland	61	57	61	54	54	56	73	70	73	75	75	78
Wales	49	51	52	42	45	45	61	64	62	62	66	64
UK	58	59	59	53	54	54	71	72	72	77	78	78



Table 5: Non-UK Percentages: September 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: September 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	43	44	45	217	52	50	50	303	54	56	53	111
Northern Ireland	17	17	18	70	37	44	31	27	34	36	32	31
Scotland	45	44	45	46	56	52	62	59	58	60	58	52
Wales	36	29	34	35	40	44	42	41	48	46	45	26
UK	42	42	44	368	51	50	51	430	54	56	53	220

Table6: Occupancy Levels by Size: September 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	63	63	65	59	64	57	39	57	58	60	1279
Northern Ireland	34	38	35	21	45	49	37	22	54	61	57	10
Scotland	60	58	58	55	61	61	62	39	60	57	59	55
Wales	49	54	54	21	47	54	57	11	49	55	54	7
UK	56	61	61	162	58	63	57	111	57	58	59	1351



Table 7: Occupancy Levels by Size: September 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	53	54	53	217	65	62	63	303	69	70	70	111
Northern Ireland	24	24	25	70	47	55	44	27	50	54	51	31
Scotland	57	50	54	46	67	66	71	59	70	74	72	52
Wales	42	37	41	35	51	54	51	41	64	63	59	26
UK	52	52	52	375	64	62	63	430	69	70	69	220

Table 7: Occupancy Levels by Size: September 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	73	79	79	65	80	82	75	39	83	82	83	1279
Northern Ireland	62	67	63	21	66	73	71	22	74	86	85	10
Scotland	76	75	80	55	81	82	84	39	86	85	88	55
Wales	65	72	72	21	70	80	73	11	72	76	79	7
UK	73	78	78	162	79	82	76	111	83	82	84	1351



Table 8: Occupancy Levels by Location Types: September 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	57	59	216	59	62	60	1007	50	52	51	408	53	56	56	383
Northern Ireland	43	46	41	40	47	52	46	58	36	34	29	52	22	24	17	31
Scotland	62	57	60	40	59	59	62	116	53	49	47	64	53	53	58	86
Wales	52	54	53	36	43	50	52	12	42	46	48	19	43	43	42	74
UK	57	57	58	332	58	61	60	1193	50	51	50	543	52	54	55	574

Table 8: Occupancy Levels by Location Types: September 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	70	73	71	216	80	82	83	1007	72	74	74	408	69	70	71	383
Northern Ireland	57	64	60	40	68	77	77	58	47	46	43	52	35	38	31	31
Scotland	75	68	74	40	82	83	86	116	67	66	66	64	66	65	70	86
Wales	66	68	67	36	67	72	74	12	67	71	69	19	53	54	52	74
UK	70	72	71	332	79	81	83	1193	71	72	72	543	67	68	69	574

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	**	**	**	**	38	43	35	33	44	41	39	134
Northern Ireland	**	**	**	**	28	26	22	24	27	34	22	41
Scotland	**	**	**	**	41	37	52	16	50	46	47	56
Wales	**	**	**	**	24	23	21	8	37	35	38	41
UK	**	**	**	**	37	40	37	81	44	41	40	272

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	55	57	53	167	58	56	53	81	57	59	58	1561
Northern Ireland	35	38	32	33	44	33	43	26	48	53	46	57
Scotland	58	55	55	35	58	55	67	33	60	60	61	166
Wales	47	47	41	23	56	59	51	17	48	54	55	52
UK	55	56	52	258	58	56	55	157	57	59	58	1836

** FIGURES NOT AVAILABLE



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	**	**	**	**	49	53	48	33	57	55	54	134
Northern Ireland	**	**	**	**	38	30	31	24	35	46	30	41
Scotland	**	**	**	**	52	45	66	16	64	63	61	56
Wales	**	**	**	**	33	34	28	8	47	47	49	41
UK	**	**	**	**	48	50	49	81	57	55	54	272

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	69	68	167	73	69	67	81	79	80	79	1561
Northern Ireland	53	55	46	33	56	50	68	26	69	79	77	57
Scotland	72	68	68	35	75	73	81	33	80	80	82	166
Wales	63	58	56	23	69	70	63	17	62	73	73	52
UK	67	68	67	258	73	69	69	157	78	79	79	1836

** 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)

