



UNITED KINGDOM OCCUPANCY SURVEY

Serviced Accommodation Annual Report
2012

December 2013

the **research** solution 

INTRODUCTION

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2012 which is jointly 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.

This report has been compiled by Christine King at The Research Solution.




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SUMMARY: BEDROOM OCCUPANCY

- The UK and national average annual bedroom occupancy for 2012 was flat against 2011, with the exception of Northern Ireland where there was an increase of 6 percentage points in 2012.
 - The monthly UK bedroom occupancy levels remained at a similar level with 2011 for four out of the first 6 months of the year, with a decrease of 2 percentage points in both February and June. In July, occupancy levels dropped by 4 percentage points, which could be attributed to the exceptionally wet weather across the majority of the UK during the peak summer months. Levels for the latter months of 2012 were again flat against 2011.
 - Bedroom Occupancy levels in England decreased by 2 percentage points in February and June, with July falling by 5 percentage points during 2012. October was the only month to witness a rise (by 2 percentage points) with all other months during 2012 remaining on a par with 2011.
 - Scotland saw an increase in bedroom occupancy levels during January of 3 percentage points. February and October also increased by 2 percentage points with levels in August decreasing slightly. All other months remained flat against levels achieved in 2011.
 - Both Wales and Northern Ireland witnessed fluctuating occupancy levels during 2012 with Wales seeing increases during March, September and December and decreases in February, April, May, June, July and November.
 - Northern Ireland saw increases in bedroom occupancy levels across all months in 2012, with the highest increase of 12 percentage points witnessed in April.
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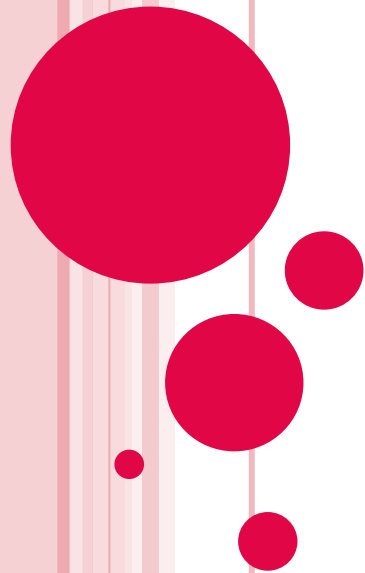
SUMMARY: BEDSPACE OCCUPANCY

- UK bedspace occupancy levels remained flat against 2011 across most of the year. March witnessed an increase of 3 percentage points and September an increase of 2 percentage points. July was again the only month to see a noticeable decrease (down 4 percentage points).
 - England bedspace occupancy levels were similar to the UK with an increase in March by 3 percentage points. January and September also witnessed an increase of 2 percentage points with July dropping by 5 percentage points.
 - Scotland bedspace occupancy levels increased by 2 percentage points during January and March. April and July saw decreases of 3 percentage points and September a decrease of 2 percentage points.
 - Wales bedspace occupancy saw increases in March, August and September of between 2 and 4 percentage points. Occupancy levels in May decreased by 2 percentage points and by 3 percentage points in July.
 - Northern Ireland bedspace occupancy levels decreased slightly by 2 percentage points in February. All other months witnessed increases in bedspace occupancy levels, the highest being 12 percentage points in July.
- 

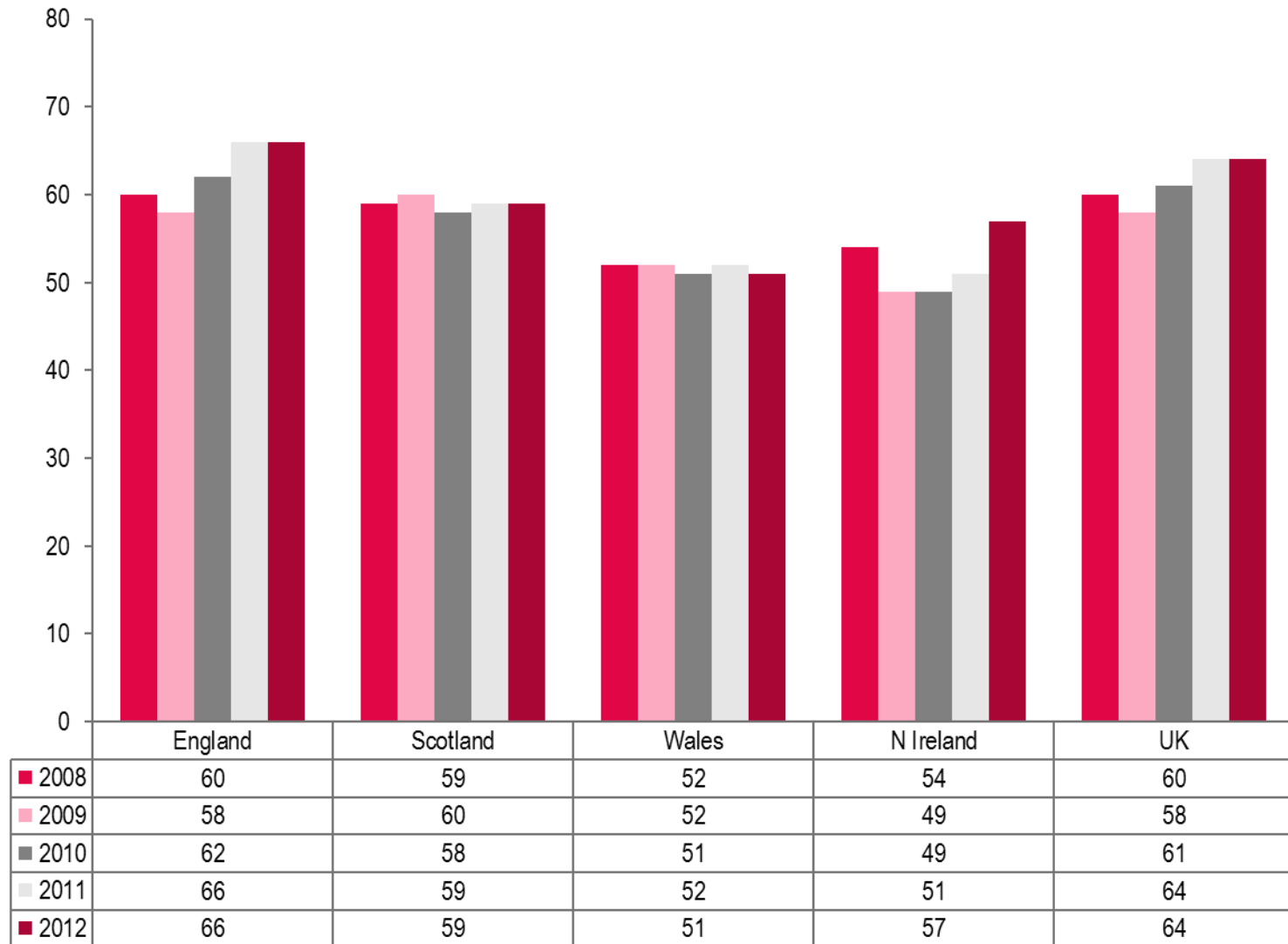
SUMMARY: ROOM AND BEDSPACE OCCUPANCY IN DETAIL

- Across the UK as a whole, weekday bedroom and bedspace occupancy levels remained flat when compared with 2011. Northern Ireland witnessed an 8 percentage point increase in bedroom occupancy and a 5 percentage point increase in bedspace occupancy in 2012. England also witnessed a slightly increase of 2 percentage points in weekday bedroom occupancy levels.
- The UK weekend bedroom and bedspace occupancy levels were also similar to 2011, with the exception of Northern Ireland where bedroom occupancy increased by 6 percentage points and bedspace occupancy by 5 percentage points in 2012.
- There was little change in both bedroom and bedspace occupancy by type of establishment, with both measures remaining flat with levels achieved in 2011.
- Bedroom occupancy levels in Northern Ireland increased in both the hotel and guesthouse sector (7 and 16 percentage points respectively). Scotland witnessed a slight increase in the B&B sector of 2 percentage points and a decrease of 3 percentage points in the guest house sector. The guesthouse sector in Wales also saw a fall of 2 percentage points.
- Bedspace occupancy levels in Northern Ireland increased by 5 percentage points in the hotel sector and by 15 percentage points in the guest house sector. The percentage of bedspace occupancy for guesthouses in Scotland also witnessed an increase of 5 percentage points. Bedspace occupancy in the guest house sector decreased by 2 percentage points in Wales.
- Across the UK, bedroom occupancy levels by location witnessed a slight increase in the small town category of 2 percentage points and a decrease in the countryside / village category of 2 percentage points. Bedspace occupancy levels across all locations remained flat when compared with 2011.

BEDROOM OCCUPANCY: UK AND NATIONAL



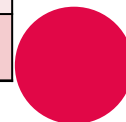
UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY 2008-2012



UK AND NATIONAL: MONTHLY BEDROOM OCCUPANCY 2008-2012

Table 1: UK and National: Bedroom Occupancy 2008- 2012

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12
January	45	42	43	49	50	43	42	38	36	39	35	32	31	33	32	38	35	32	31	35	44	41	42	46	47
February	55	49	53	59	57	50	49	50	46	48	45	41	43	45	40	49	46	42	44	45	54	49	52	56	54
March	55	51	50	62	62	52	52	50	50	50	46	43	45	47	50	51	47	46	44	48	54	51	50	59	59
April	59	58	59	65	65	55	58	55	58	57	49	51	53	54	50	55	50	40	48	60	58	57	58	63	63
May	65	61	65	68	69	66	67	66	67	67	60	56	57	57	55	62	54	53	55	62	65	61	64	67	68
June	66	65	73	75	73	69	70	72	74	73	59	62	63	63	60	64	56	58	65	71	66	65	72	74	72
July	71	67	77	77	72	70	74	74	73	72	64	66	64	64	60	62	58	61	60	70	70	68	76	75	71
August	70	67	72	72	73	77	79	78	79	77	67	67	65	65	65	69	65	63	67	74	71	69	72	72	73
September	69	69	75	76	77	70	70	72	74	73	62	64	62	62	65	63	55	60	60	67	69	69	74	75	75
October	64	64	69	69	71	63	61	62	60	62	54	55	55	53	52	54	49	50	52	59	63	63	67	67	68
November	56	56	61	64	64	53	52	51	52	51	45	45	45	47	44	46	40	43	46	50	55	55	58	61	61
December	48	51	52	55	56	43	44	36	41	41	37	39	34	36	40	38	36	35	38	43	47	49	49	52	53



UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY AVERAGES 2008-2012

Table 1a: UK and National: Bedroom Occupancy Averages 2008- 2012

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12
April–Oct Average	66	64	70	72	71	67	68	68	69	69	59	60	60	60	58	61	55	55	58	66	66	65	69	70	70
July–Sept Average	70	68	75	75	74	72	74	75	75	74	64	66	64	64	63	65	59	61	63	70	70	68	74	74	73
Annual Average	60	58	62	66	66	59	60	58	59	59	52	52	51	52	51	54	49	49	51	57	60	58	61	64	64



UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY

TRENDS

2008-2012

Table 2: UK and National: Bedroom Occupancy Trends 2008- 2012

	England			Scotland			Wales			Northern Ireland			UK		
	08-10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12
January	43	45	47	41	39	38	33	32	32	35	33	33	42	43	45
February	52	54	56	50	48	48	43	43	43	46	44	44	52	52	54
March	52	54	58	51	51	50	45	45	47	48	46	46	52	53	56
April	59	61	63	56	57	57	51	53	52	48	46	49	58	59	61
May	64	65	67	66	67	67	58	57	56	56	54	57	63	64	66
June	68	71	74	70	72	73	61	63	62	59	60	65	68	70	73
July	72	74	75	73	74	73	65	65	63	60	60	64	71	73	74
August	70	70	72	78	79	78	66	66	65	66	65	68	71	71	72
September	71	73	76	71	72	73	63	63	63	59	58	62	71	73	75
October	66	67	70	62	61	61	55	54	53	51	50	54	64	66	67
November	58	60	63	52	52	51	45	46	45	43	43	46	56	58	60
December	50	53	54	41	40	39	37	36	37	36	36	39	48	50	51



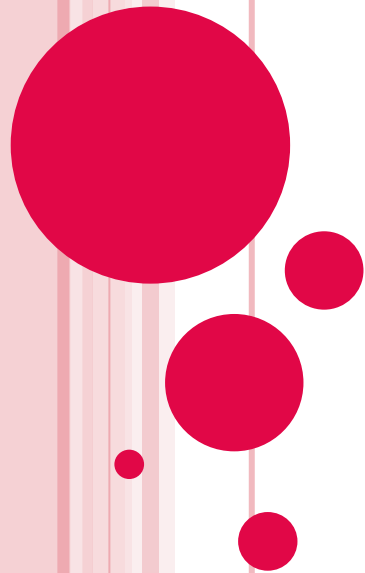
UK AND NATIONAL: ANNUAL BEDROOM OCCUPANCY TRENDS - AVERAGES 2008-2012

Table 2a: UK and National: Bedroom Occupancy Trends 2008- 2012

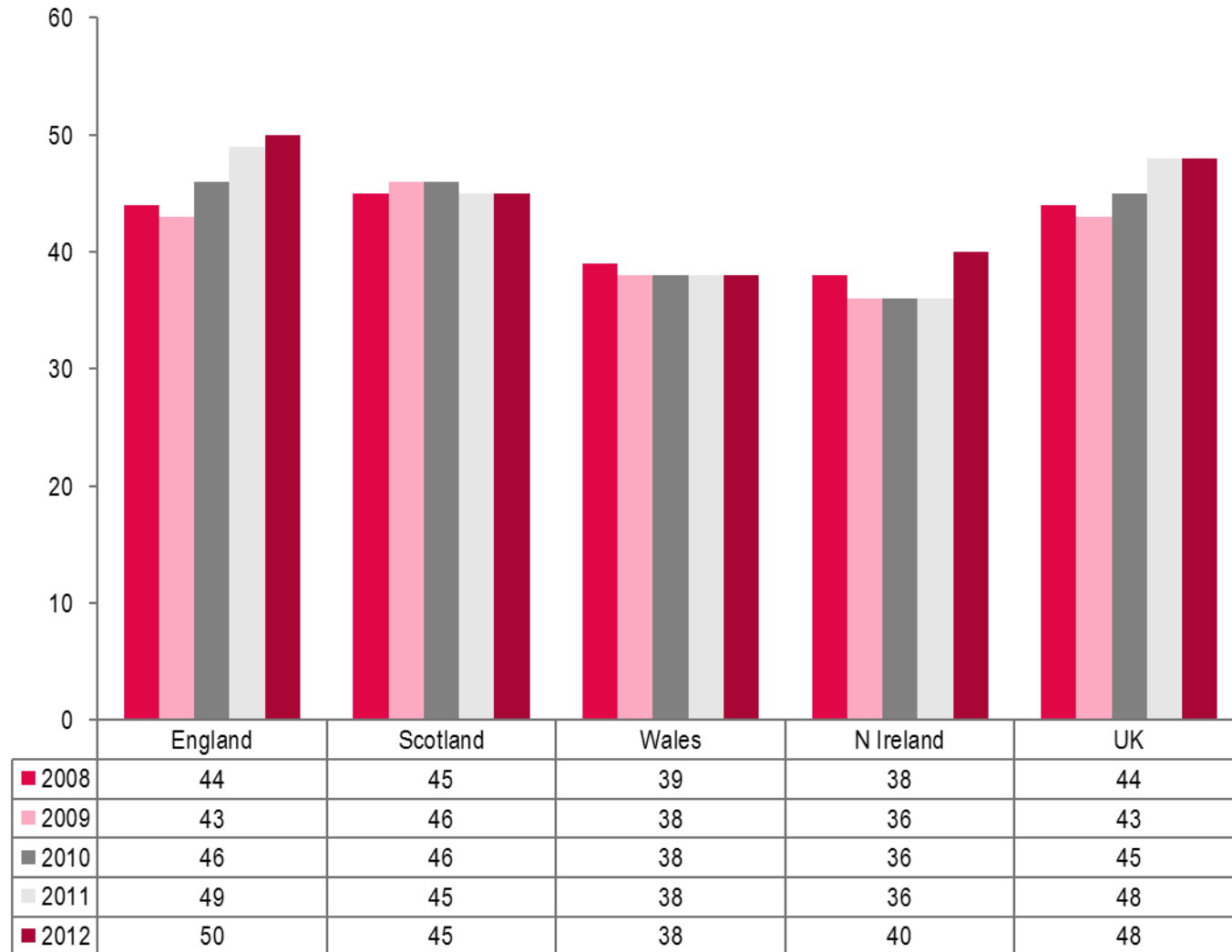
	England			Scotland			Wales			Northern Ireland			UK		
	08-10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12
April–Oct Average	67	69	71	68	68	69	60	60	59	57	56	60	67	68	70
July–Sept Average	71	73	75	74	75	75	65	65	64	62	61	65	71	72	74
Annual Average	60	62	65	59	59	59	52	52	51	51	50	52	60	61	63



BEDSPACE OCCUPANCY: UK AND NATIONAL



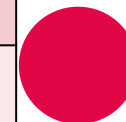
UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY 2008-2012



UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY 2008-2012

Table 3: UK and National: Bedspace Occupancy 2008- 2012

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12
January	29	27	28	34	36	29	29	27	25	27	21	21	20	21	21	25	24	20	21	25	29	27	27	32	33
February	37	35	36	42	42	36	35	36	33	33	30	28	30	30	29	33	33	30	31	29	36	35	36	40	40
March	39	36	36	43	46	39	37	36	34	36	34	30	32	32	36	37	32	31	30	33	39	36	36	41	44
April	42	43	44	50	50	40	46	43	46	43	35	38	40	40	39	36	36	33	37	42	41	43	43	49	48
May	49	47	48	51	51	52	53	52	51	51	47	43	43	42	40	43	39	37	39	42	49	47	48	50	50
June	49	49	53	56	57	53	55	56	58	57	44	45	47	46	46	44	40	43	44	48	49	49	53	55	56
July	54	54	59	60	55	57	62	61	61	58	50	51	51	48	45	45	46	49	42	54	54	55	59	59	55
August	59	57	58	59	59	65	67	66	65	64	55	55	53	52	54	54	53	50	52	56	59	58	59	59	59
September	50	51	56	56	58	53	54	56	57	55	48	48	47	45	48	44	38	43	42	46	50	51	55	55	57
October	47	48	52	52	53	47	47	48	46	45	40	40	40	39	39	37	35	28	36	42	46	47	50	50	51
November	39	38	43	47	48	38	37	37	37	36	32	30	29	31	31	30	27	29	33	35	38	37	41	44	45
December	34	36	39	42	42	32	33	28	31	32	27	28	23	25	30	26	26	26	28	30	33	35	36	39	40



UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY

TRENDS - AVERAGES

2008-2012

Table 3a: UK and National: Average Bedspace Occupancy 2008- 2012

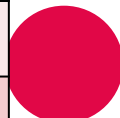
	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12	08	09	10	11	12
April–Oct Average	50	50	53	55	55	53	55	55	55	53	46	46	46	45	44	43	41	42	42	47	50	50	53	54	54
July–Sept Average	54	54	58	58	57	59	61	61	61	59	51	51	50	48	49	48	46	47	45	52	55	55	58	58	57
Annual Average	44	43	46	49	50	45	46	46	45	45	39	38	38	38	38	38	36	36	36	40	44	43	45	48	48



UK AND NATIONAL: MONTHLY BEDSPACE OCCUPANCY TRENDS 2008-2012

Table 4: UK and National: Bedspace Occupancy Trends 2008- 2012

	England			Scotland			Wales			Northern Ireland			UK		
	08-10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12
January	28	30	33	28	27	26	21	21	21	23	22	22	28	29	31
February	36	38	40	36	35	34	29	29	30	32	31	30	36	37	39
March	37	38	42	37	36	35	32	31	33	33	31	31	37	38	40
April	43	46	48	43	45	44	38	39	40	35	35	37	42	45	47
May	48	49	50	52	52	51	44	43	42	40	38	39	48	48	49
June	50	53	55	55	56	57	45	46	46	42	42	45	50	52	55
July	56	58	58	60	61	60	51	50	48	47	46	48	56	58	58
August	58	58	59	66	66	65	54	53	53	52	52	53	59	59	59
September	52	54	57	54	56	56	48	47	47	42	41	44	52	54	56
October	49	51	52	47	47	46	40	40	39	33	33	35	48	49	50
November	40	43	46	37	37	37	30	30	30	29	30	32	39	41	43
December	36	39	41	31	31	30	26	25	26	26	27	28	35	37	38



UK AND NATIONAL: ANNUAL BEDSPACE OCCUPANCY TRENDS - AVERAGES 2008-2012

Table 4: UK and National: Bedspace Occupancy Trends 2008- 2012

	England			Scotland			Wales			Northern Ireland			UK		
	08-10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12	08- 10	09-11	10-12
April–Oct Average	51	53	54	54	55	54	46	46	45	42	42	44	51	52	54
July–Sept Average	55	57	58	60	61	60	51	50	49	47	46	48	56	57	58
Annual Average	44	46	48	46	46	45	38	38	38	37	36	37	44	45	47



UK AND NATIONAL ANNUAL WEEKDAY OCCUPANCY 2008-2012

Fig. 3: UK and National: Annual Weekday
Bedroom Occupancy 2008 – 2012

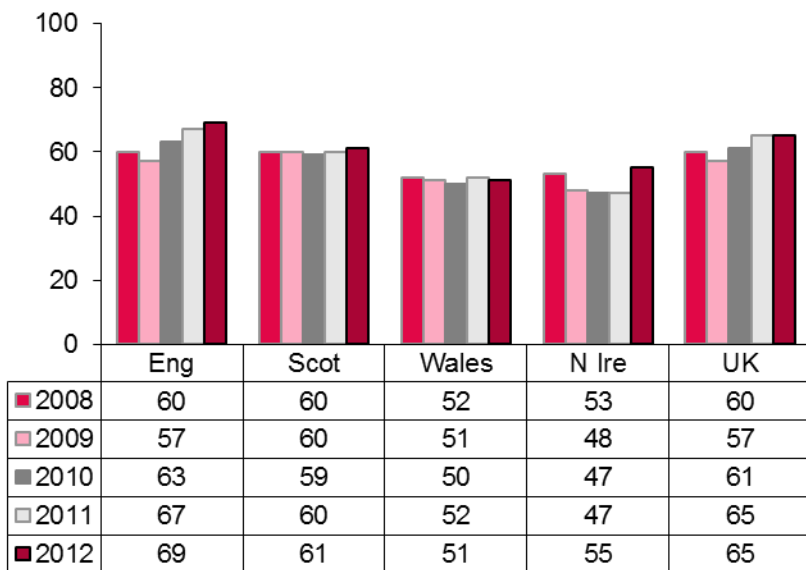
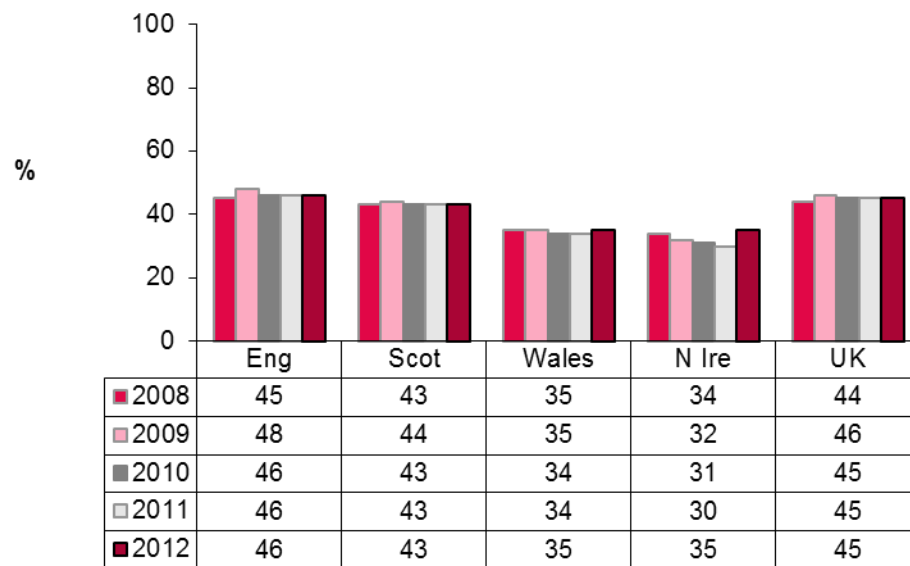
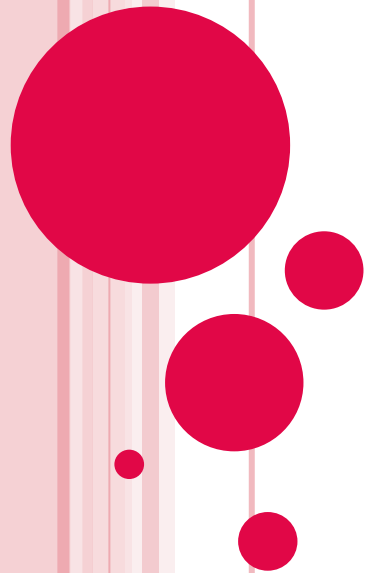


Fig. 4: UK and National: Annual Weekday
Bedspace Occupancy 2008 - 2012



OCCUPANCY IN DETAIL: UK AND NATIONAL



UK AND NATIONAL ANNUAL WEEKEND OCCUPANCY 2008-2012

Fig. 5 UK and National: Annual Weekend Bedroom Occupancy 2008 – 2012

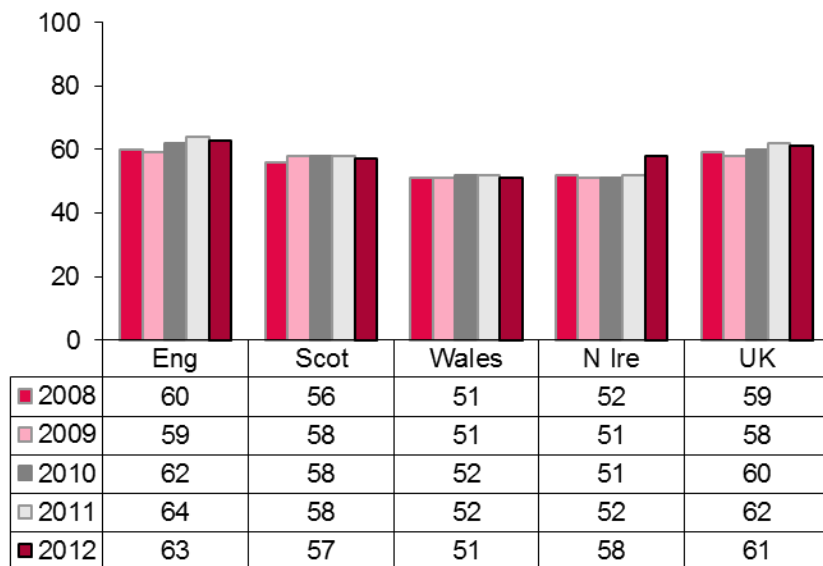
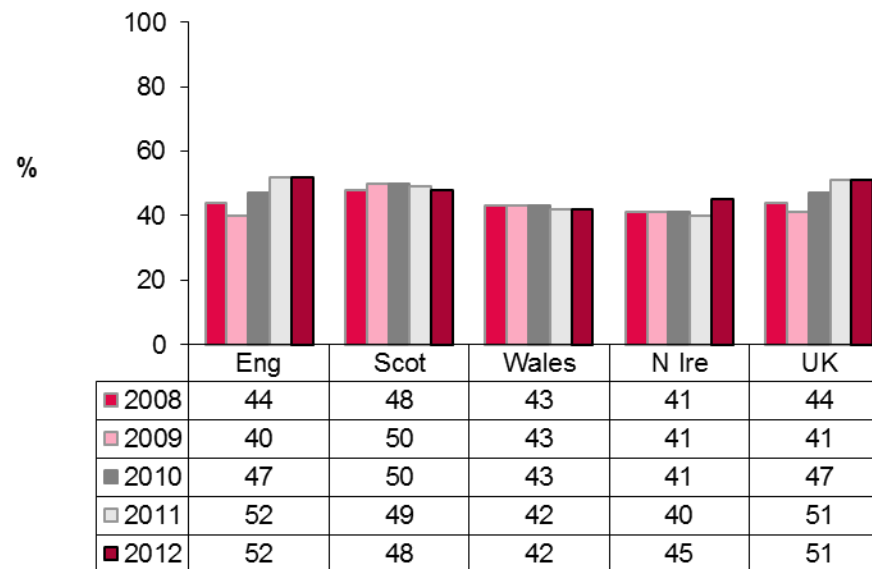


Fig. 6: UK and National: Annual Weekend Bedspace Occupancy 2008 – 2012



ORIGIN OF VISITORS

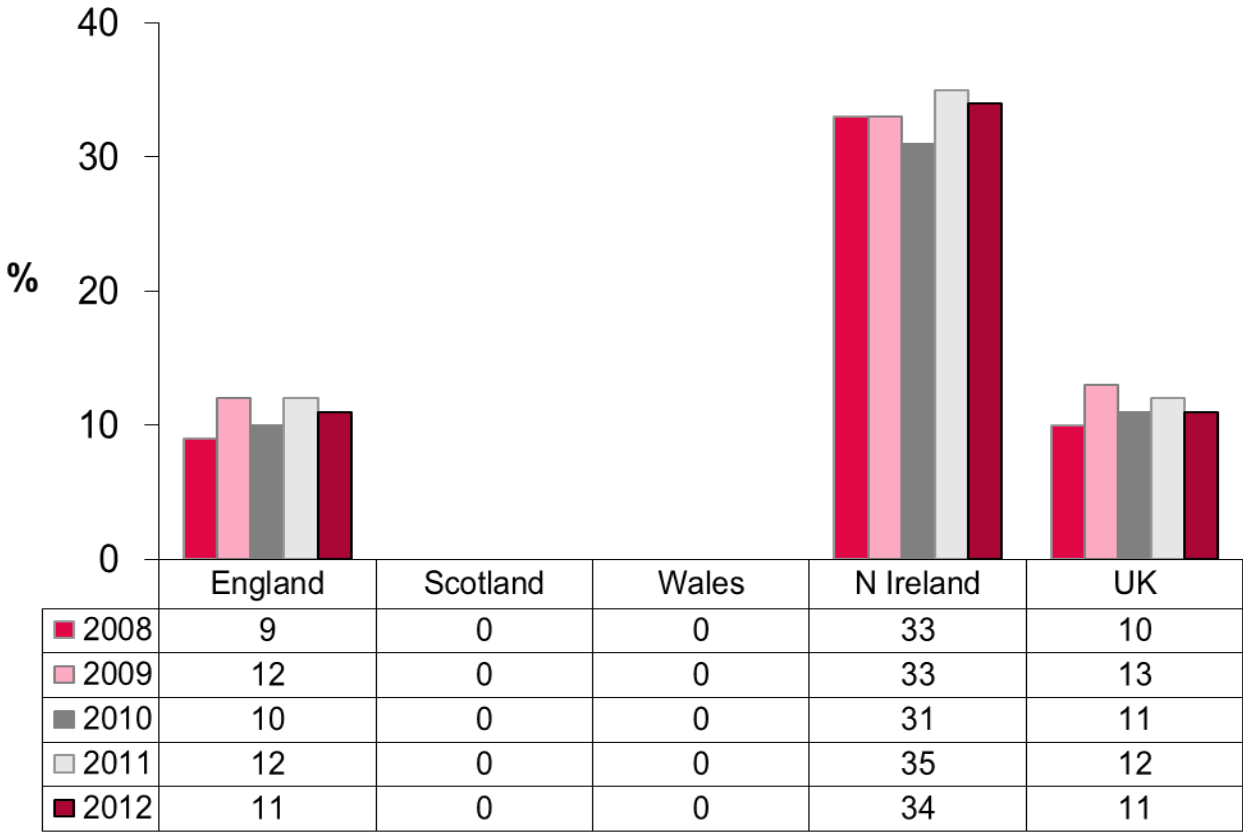
Fig. 7: UK: Annual Bedspace Occupancy 2008 - 2012 by Origin of Visitors



- Note that the occupancy figures in figure 7 and 8 are based on only those establishments able to differentiate between UK and non-UK visitors which is less than the total sample
- In addition the figures in figure 7 are calculated only on figures for England, Wales and Northern Ireland while those in figure 8 are calculated only on figures for England and Northern Ireland.



FIG 8: UK AND NATIONAL: ANNUAL NON-UK ARRIVALS AS A PERCENTAGE OF ALL ARRIVALS 2008-2012



➤ Due to changes in the data collection, it is no longer possible to provide UK/non UK figures for Scotland or figures relating to arrivals for Wales

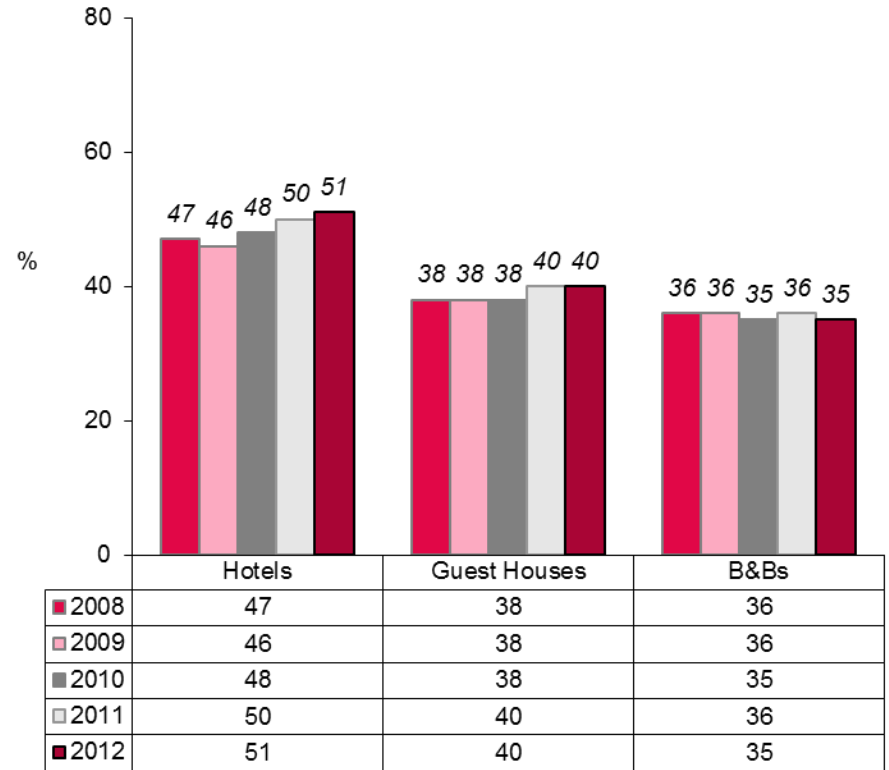


UK ANNUAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 9: UK: Annual Bedroom Occupancy 2008 - 2012 by Type of Establishment



Fig. 10: UK: Annual Bedspace Occupancy 2008 - 2012 by Type of Establishment



NATIONAL OCCUPANCY BY TYPE OF ESTABLISHMENT

Fig. 11: National: Annual Bedroom Occupancy 2011 and 2012 by Type of Establishment

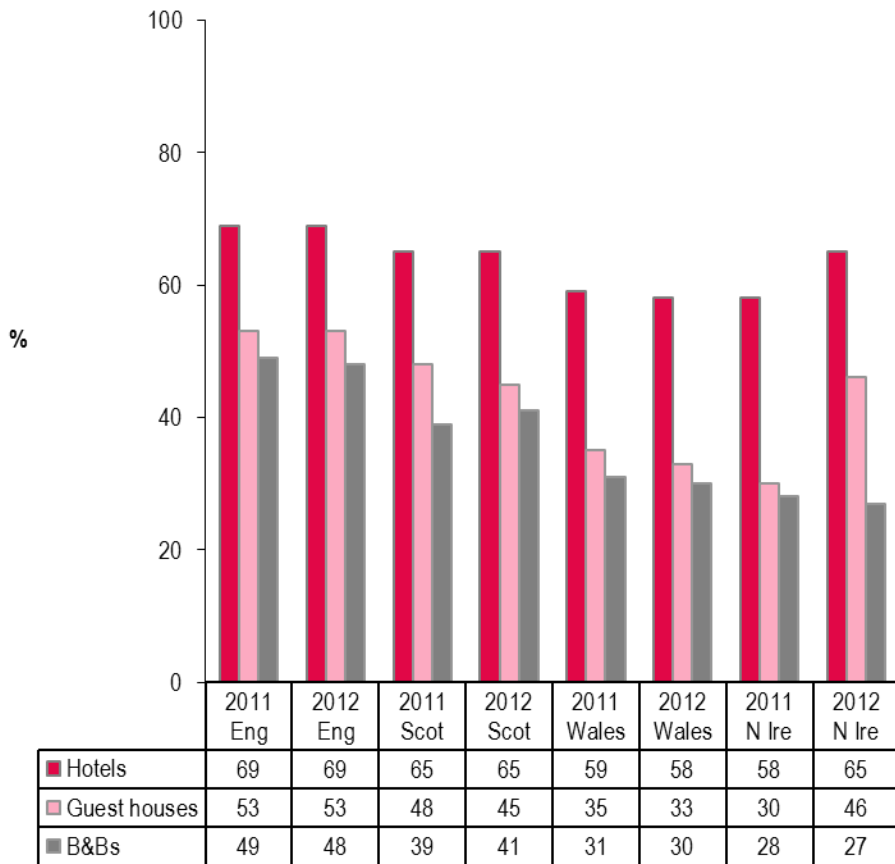
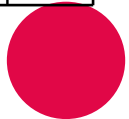
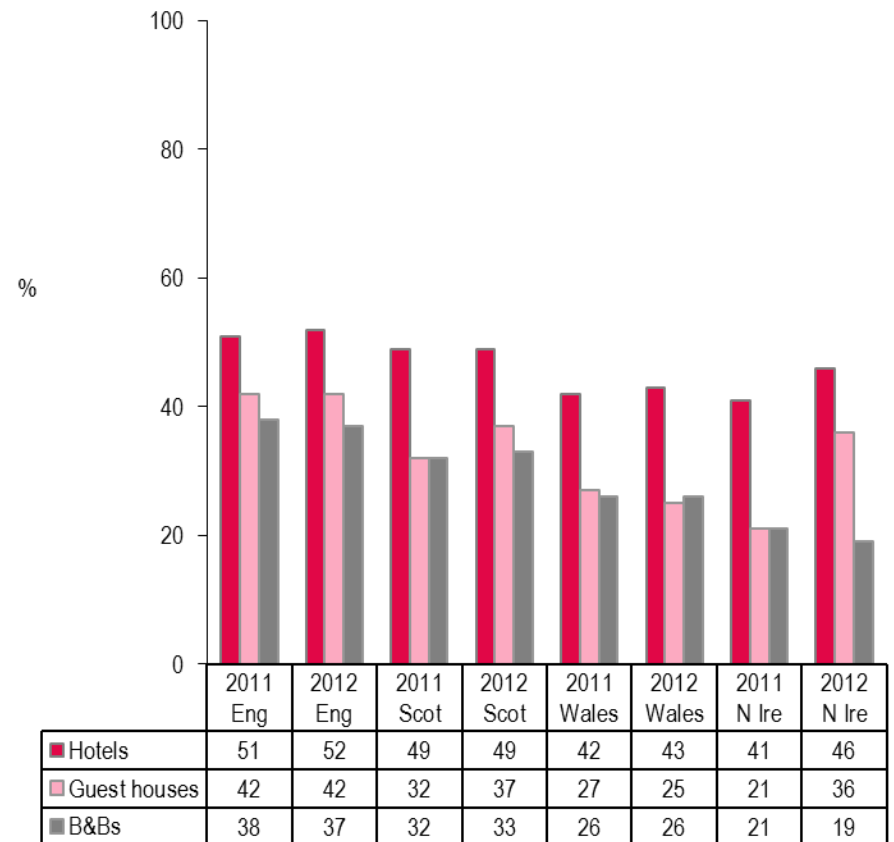


Fig. 12: National: Annual Bedspace Occupancy 2011 and 2012 by Type of Establishment



UK OCCUPANCY BY LOCATION OF ESTABLISHMENT

Fig. 13: UK: Annual Bedroom Occupancy 2008 - 2012 by Location of Establishment

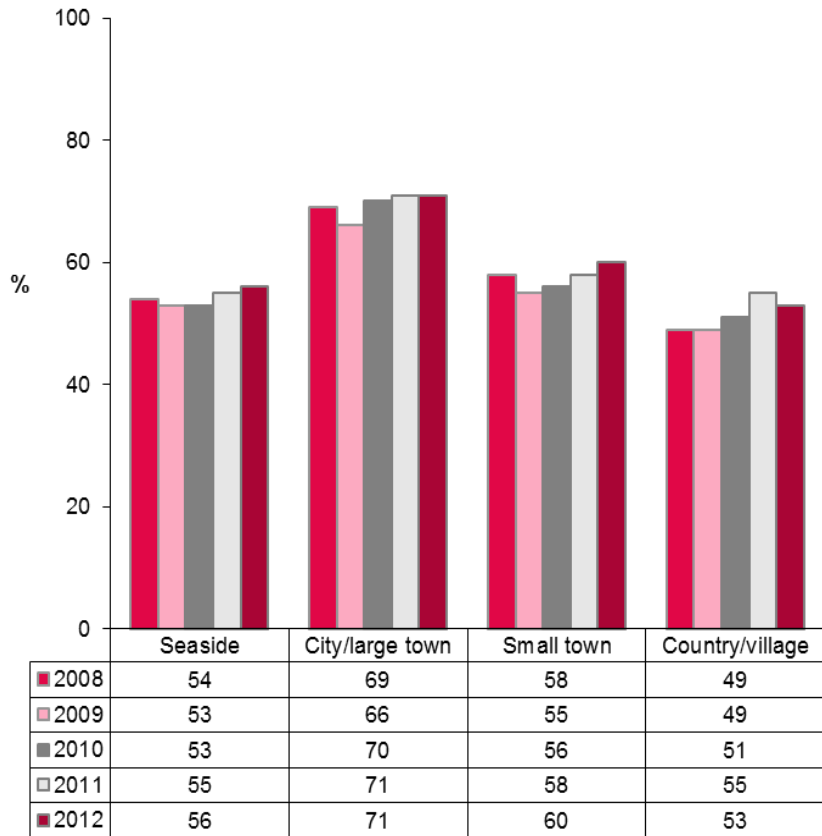
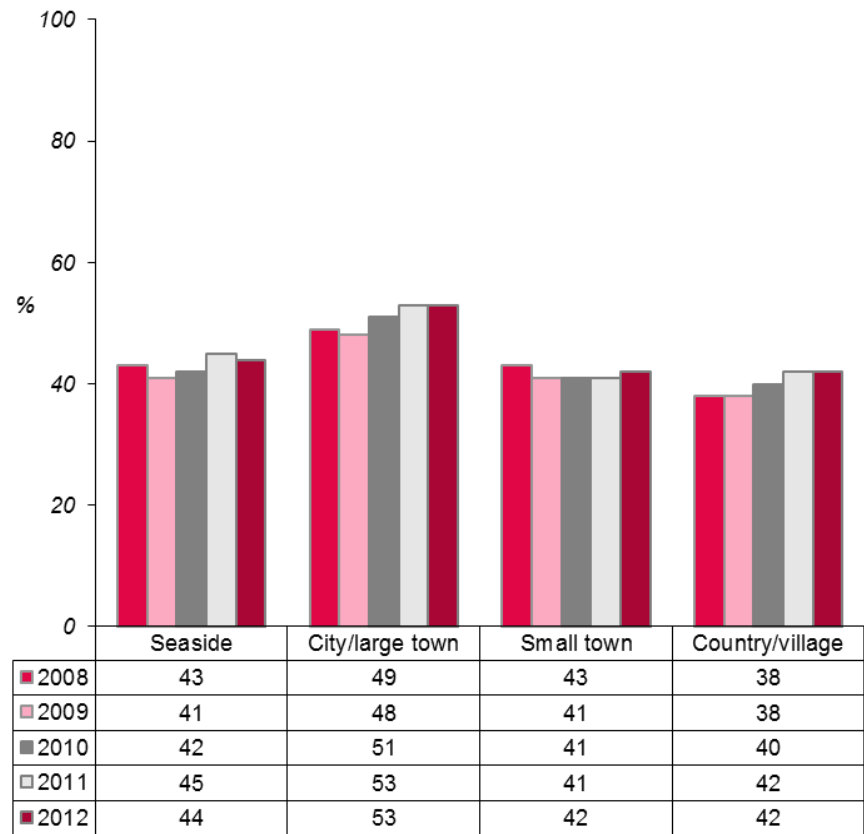
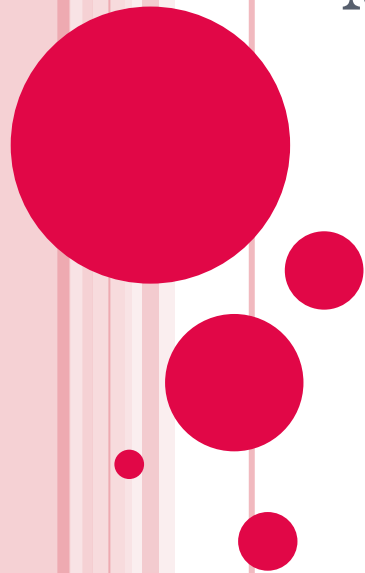


Fig. 14: UK: Annual Bedspace Occupancy 2008 - 2012 by Location of Establishment



BACKGROUND AND METHODOLOGY



BACKGROUND TO THE SURVEY

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) 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)



BACKGROUND TO THE SURVEY (CONT'D)

- This document summarises the main trends from the surveys carried out in England, Scotland, Wales and Northern Ireland which have been aggregated to provide occupancy figures for the UK as a whole.
- The individual surveys are conducted according to a common specification to ensure the production of comparable data for the whole of the UK.
- The survey includes hotels (including motels, lodges and inns), guesthouses and private houses offering bed and breakfast to tourists (including farmhouses). It should be noted that only in Northern Ireland, where compulsory registration of tourist accommodation ensures an accurate stock record, is there a definition of the various types of accommodation. In England, Scotland and Wales the type is defined by each accommodation establishment itself in answering a questionnaire and therefore, because the criteria are not objectively defined, the distinction between types is not always clear and may vary slightly.

In 2012 there were about 46,900 establishments of this type in the UK which were known to the tourist boards, with a total of just over 1.5 million bedspaces available daily.



METHODOLOGICAL DETAILS

Figure 15: Distribution of total known accommodation stock 2012: Number of establishments

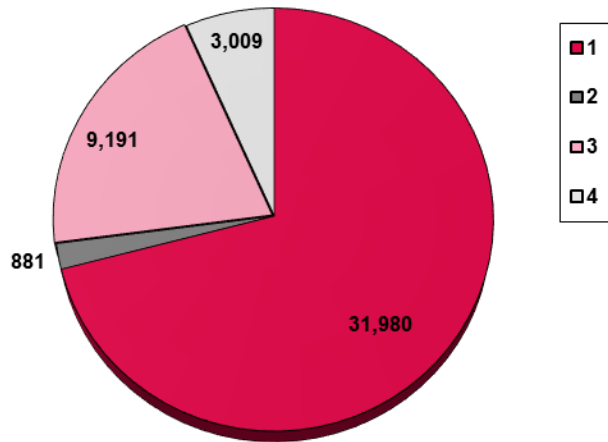
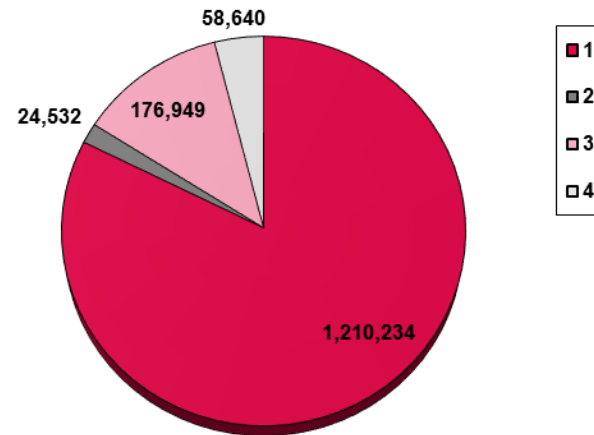


Figure 16: Distribution of total known accommodation stock 2012: Number of bedspaces



- Each month between 2,181 and 2,466 returned data and the occupancy rates in the report are calculated from these monthly samples.
- The occupancy figures in this summary are calculated on the accommodation available each month - i.e. only open accommodation is included. In calculating figures for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area that month.



METHODOLOGICAL DETAILS (CONT'D)

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.