



UNITED KINGDOM OCCUPANCY SURVEY

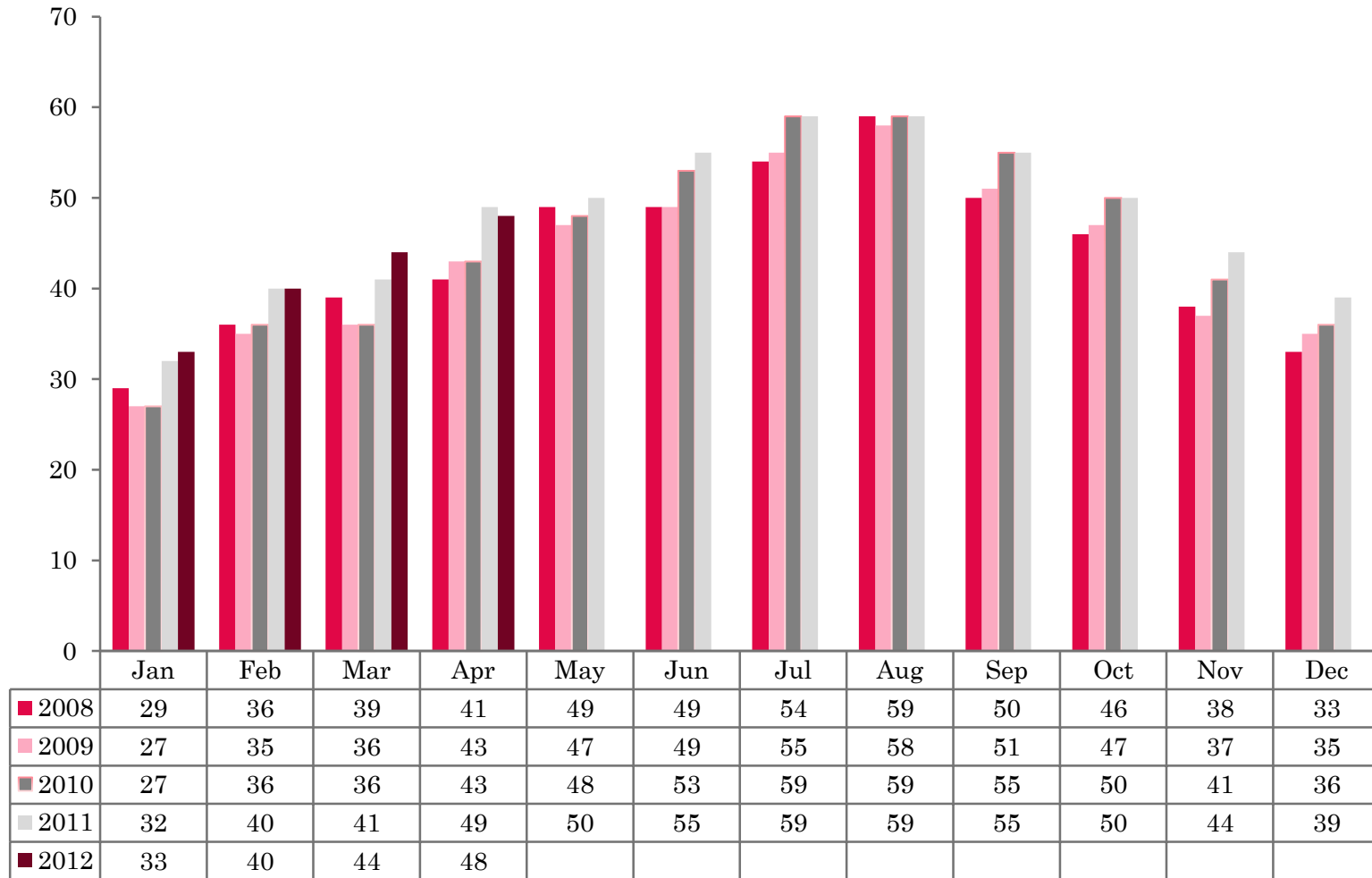
Serviced Accommodation Summary Report
April 2012

UK OCCUPANCY SURVEY

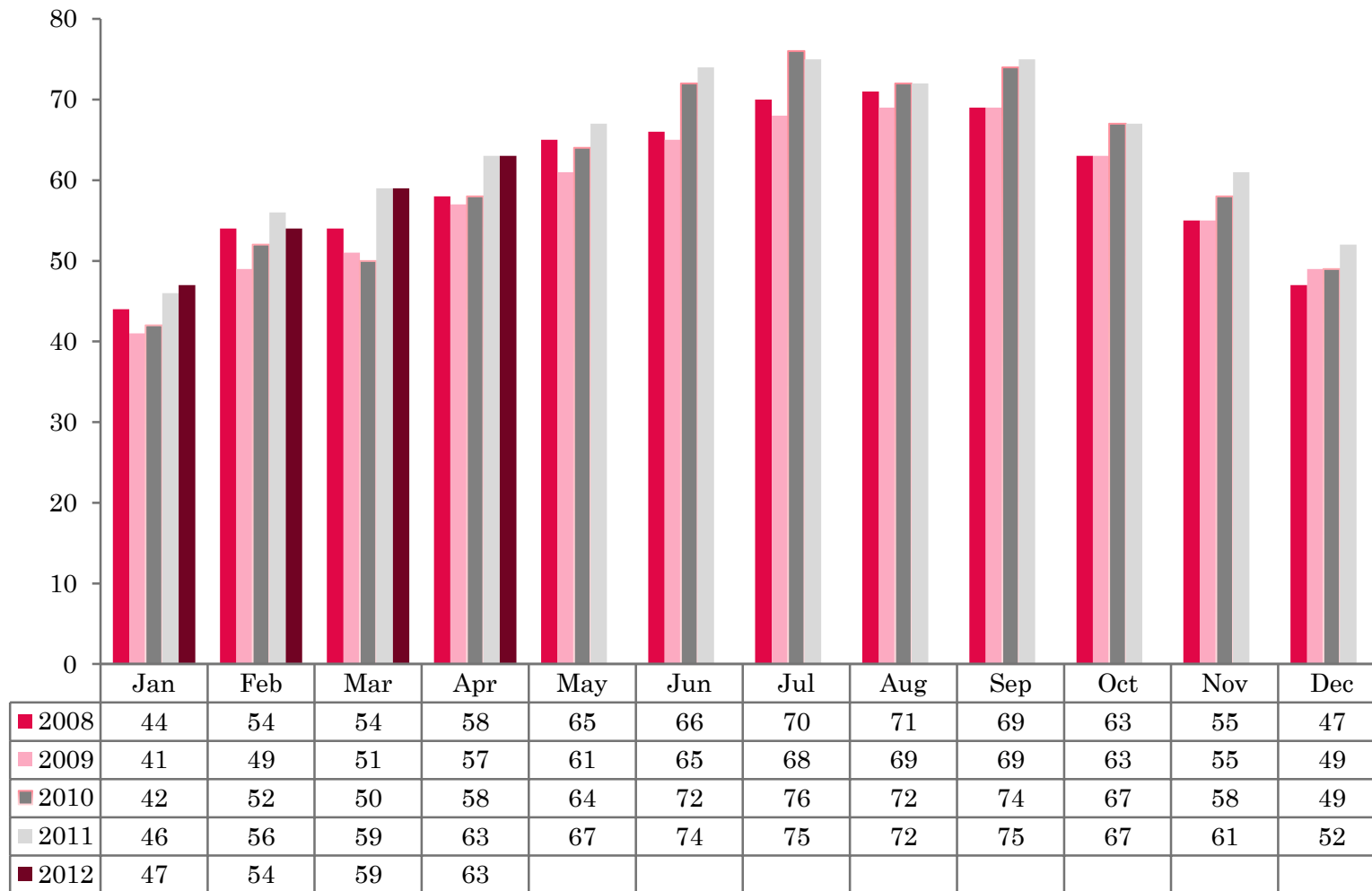
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution



UK BEDSPACE OCCUPANCY 2008 - 2012



UK BEDROOM OCCUPANCY 2008 - 2012



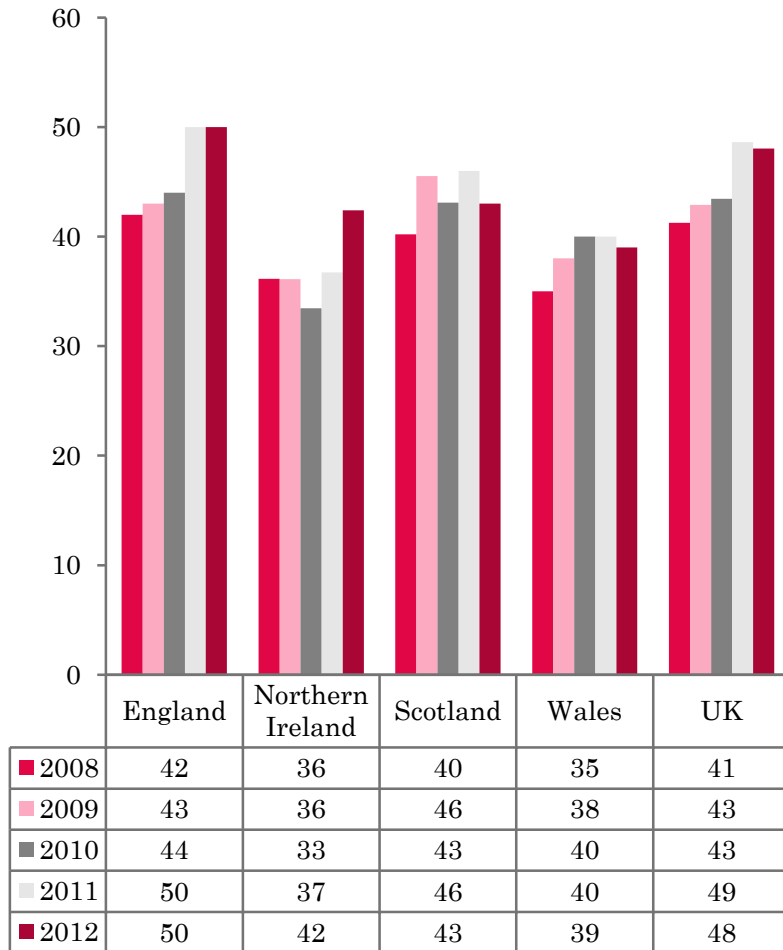
- ❖ 2270 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates.



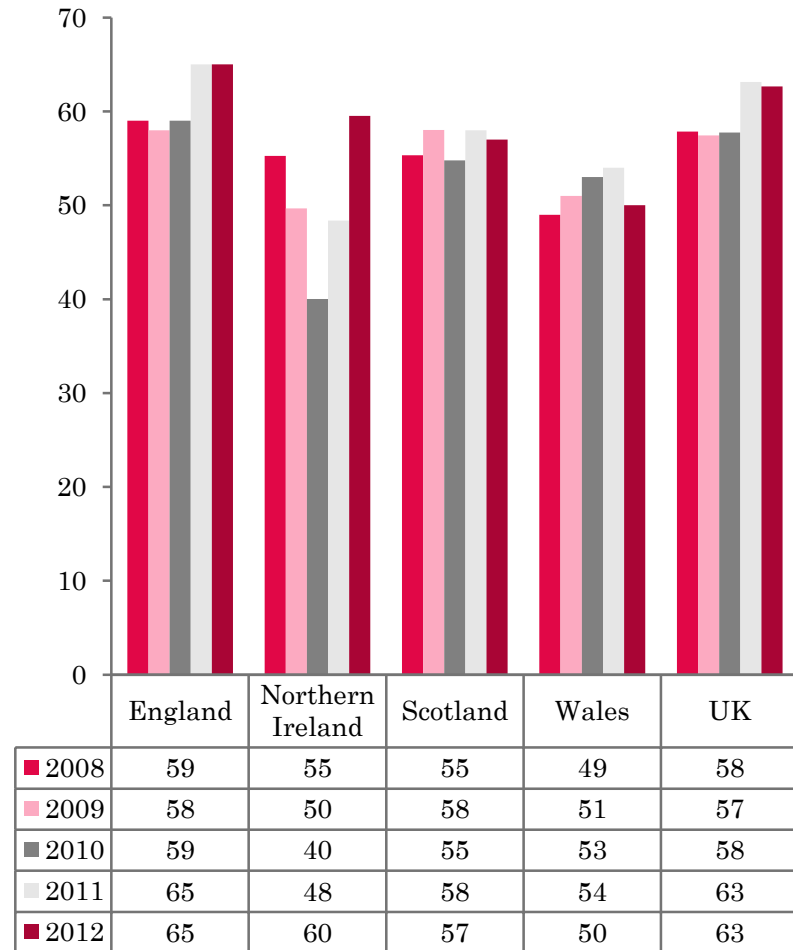
- ❖ UK bedspace occupancy (48%) had decreased by 1 percentage point while room occupancy (63%) had (as in the previous month) remained at its 2011 figure.



NATIONAL BEDSPACE OCCUPANCY APRIL 2008-2012



NATIONAL ROOM OCCUPANCY APRIL 2008-2012



- ❖ Bedspace occupancy varied from 50% in England to 39% in Wales, whilst room occupancy varied from 65% in England to 50% in Wales.
- ❖ Room occupancy in the UK for April (as in 2011) was at its highest level since 2008, up 5 percentage points in that period. UK bedspace occupancy fell by 1 percentage point when compared with April 2011.
- ❖ As with the UK figures, occupancy levels in England remained the same as April 2011, 6 percentage points above the 2008 figures for room and 8 percentage points higher for bedspace occupancy.
- ❖ When compared with April 2011, occupancy levels in Northern Ireland had increased by 12 percentage points for room, and 5 percentage points for bedspace occupancy. In fact, Occupancy levels in the country were at a 5 year high, with bedspace and room occupancy being 6 and 5 percentage points higher than in 2008.
- ❖ Although occupancy levels in Scotland and Wales have crept up since 2008, they have fallen since April 2011, by 3 and 1 percentage points for bedspace and room occupancy in Scotland, and by 1 and 4 percentage points for bedspace and room occupancy in Wales.



Table 1: Occupancy Levels: April 2010 - 2012

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	44	50	50	59	65	65	1181	1715	1624
Northern Ireland	33	37	42	40	48	60	141	195	182
Scotland	43	46	43	55	58	57	383	377	321
Wales	40	40	39	53	54	50	201	179	143
UK	43	49	48	58	63	63	1906	2466	2270

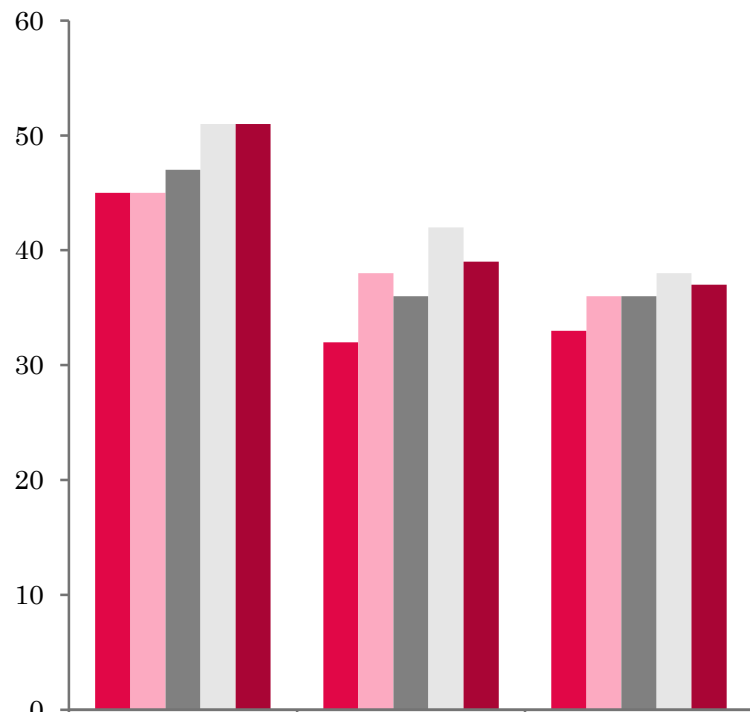
Table 2: UK/Non UK Occupancy Levels April 2010 – 2012 (see note 5a and 5b Slide 19)

	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	34	39	37	6	6	6	9	11	12	15	13	15	1181	1715	1624
Northern Ireland	22	23	27	12	14	15	29	31	32	35	38	36	141	195	182
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	383	377	321
Wales	34	36	35	2	2	2	**	**	**	6	6	6	201	179	143
UK	34	38	37	6	6	6	9	11	13	15	13	15	1906	2466	2270

** FIGURES NOT AVAILABLE

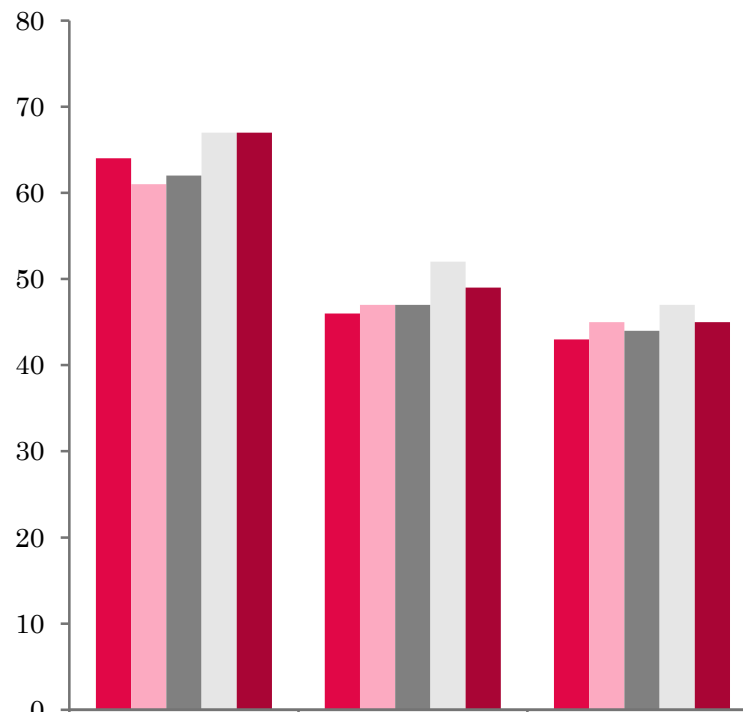


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2008-2012

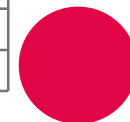


	Hotels	Guesthouses	B&Bs
2008	45	32	33
2009	45	38	36
2010	47	36	36
2011	51	42	38
2012	51	39	37

UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION APRIL 2008-2012



	Hotels	Guesthouses	B&Bs
2008	64	46	43
2009	61	47	45
2010	62	47	44
2011	67	52	47
2012	67	49	45



- ❖ Across the UK as a whole, occupancy levels in hotels had remained as in 2011 while guest houses and bed and breakfast establishments both saw levels falling (by 3 percentage points in the former and by 1 and 2 in the latter) (Table 3).
- ❖ When compared with April 2011, only those establishments with 51-100 letting bedrooms saw a rise in both measures of occupancy. Room occupancy rose in establishments with 26-50 and over 100 letting bedrooms, with bedspace occupancy remaining unchanged in the former and falling by 3 percentage points in the latter. The three smallest size categories (1-3, 11-25 and 26-50 letting bedrooms) experienced falls in occupancy levels of between 2 and 4 percentage points (Tables 6 and 7).
- ❖ When compared with April 2011, occupancy levels rose by 1 percentage point in small town locations. City/large town locations saw a similar rise in room occupancy with bedspace occupancy falling by the same amount. Occupancy levels in country/village locations fell by 1 and 3 percentage points (bedspace and room occupancy respectively) while seaside locations saw a 5 percentage point fall in both measures of occupancy (Table 8).
- ❖ Occupancy levels had fallen in all of the 5 tariff bands with the exception of room occupancy in the £20.00-£29.99 tariff band which remained as in April 2011 (Tables 9 and 10 and note 5a, Slide 19).



Table 3: Occupancy Levels by Type of Establishment: April 2010 - 2012

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	47	52	52	63	68	68	363	1039	1003
Northern Ireland	39	43	50	46	56	69	68	70	62
Scotland	47	50	48	60	64	63	241	248	216
Wales	46	45	43	60	60	57	104	90	72
UK	47	51	51	62	67	67	776	1447	1353
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	38	43	41	49	54	52	330	273	241
Northern Ireland	17	19	25	21	26	37	19	17	28
Scotland	33	43	38	42	49	44	36	57	45
Wales	29	30	26	37	40	32	38	33	28
UK	36	42	39	47	52	49	450	380	342
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	38	41	40	46	50	48	487	403	380
Northern Ireland	20	21	16	26	28	25	24	108	91
Scotland	31	30	29	37	37	39	79	7	60
Wales	32	28	32	39	33	35	59	56	43
UK	36	38	37	44	47	45	649	639	574



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: April 2010 – 2012 (see notes 5a & 5b Slide 19)

	Bedspace Occupancy %						Room Occupancy %					
	Weekend			Weekday			Weekend			Weekday		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	40	54	53	50	45	45	59	65	64	60	65	65
Northern Ireland	39	40	42	29	28	34	43	51	57	38	42	56
Scotland	48	50	47	39	42	41	55	58	55	54	58	58
Wales	48	47	44	34	33	34	56	58	53	50	50	48
UK	42	53	51	47	44	43	58	63	62	58	63	63



Table 5: Non-UK Percentages: April 2010 – 2012 (see notes 5a & 5b Slide 19)

	Percentage of Non-UK Guests %						Percentage of Non-UK Bednights %					
	Weekend			Weekday			Weekend			Weekday		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	11	9	11	8	13	13	17	12	14	13	15	16
Northern Ireland	28	33	32	30	36	35	35	40	36	36	42	39
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	6	5	5	6	7	6
UK	11	10	12	8	14	14	17	12	14	13	15	16

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Table 6: Occupancy Levels by Size: April 2010 - 2012

A: Percentage of Bedspace Occupancy												
	1 - 3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	33	36	32	260	39	39	36	344	41	45	42	123
Northern Ireland	17	14	12	82	17	22	26	27	31	30	31	29
Scotland	27	28	25	51	33	43	37	68	39	39	45	55
Wales	27	26	20	36	34	35	35	47	43	41	39	23
UK	32	34	30	429	38	39	36	486	41	44	42	230

Table6: Occupancy Levels by Size: April 2010 - 2012

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms⁵⁶			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	50	50	49	84	55	50	57	45	42	54	52	768
Northern Ireland	32	35	32	15	38	40	45	20	45	49	61	9
Scotland	47	51	49	54	57	57	51	44	53	56	53	49
Wales	42	44	47	18	49	47	48	14	58	44	38	5
UK	49	49	49	171	55	51	55	123	44	54	51	831



Table 7: Occupancy Levels by Size: April 2010 - 2012

B:Percentage of Bedroom Occupancy												
	1 -3 Rooms				4 - 10 Rooms				11 - 25 Rooms			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	42	43	39	260	48	50	45	344	52	56	55	123
Northern Ireland	23	19	22	82	21	29	34	27	42	44	44	29
Scotland	34	34	34	51	43	49	46	68	50	53	55	55
Wales	33	32	25	36	43	43	40	47	52	52	49	23
UK	40	41	37	375	47	49	45	486	52	55	54	230

Table 7: Occupancy Levels by Size: April 2010 - 2012

B (cont): Percentage of Bedroom Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	62	63	65	84	67	68	69	45	65	72	73	768
Northern Ireland	42	48	60	15	55	57	62	20	45	59	81	9
Scotland	60	62	61	54	72	70	68	44	69	7	73	49
Wales	57	57	62	18	66	71	67	14	72	62	55	5
UK	61	62	64	171	67	68	69	123	66	71	72	831



Table 8: Occupancy Levels by Location: April 2012 - 2012

A: Percentage Bedspace Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	39	45	41	237	48	55	56	597	43	42	43	352	44	46	45	438
Northern Ireland	35	34	37	42	35	43	50	53	31	26	28	53	30	20	17	34
Scotland	42	50	41	46	48	52	49	117	39	37	38	68	38	39	38	90
Wales	47	47	44	36	44	42	34	13	43	33	42	25	34	37	36	69
UK	40	46	41	361	47	54	53	780	42	41	42	498	42	44	43	631

Table 8: Occupancy Levels by Location: April 2012 - 2012

B:Percentage Bedroom Occupancy																
	Seaside				City/Large Town				Small Town				Countryside/Village			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	49	58	53	237	66	71	74	597	55	58	59	352	54	57	55	438
Northern Ireland	45	44	49	42	42	56	70	53	38	34	41	53	31	28	30	34
Scotland	50	60	53	46	63	68	67	117	50	47	51	68	48	49	46	90
Wales	58	60	55	36	60	60	50	13	61	53	58	25	42	47	43	69
UK	50	58	53	361	65	70	71	780	54	56	57	498	52	55	52	631

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2010 – 2012 (see note 5a Slide 19)

A: Percentage of Bedspace Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	**	**	**	**	18	24	22	52	32	34	30	175
Northern Ireland	**	**	**	**	16	20	13	33	17	16	19	48
Scotland	**	**	**	**	42	27	30	22	36	37	30	66
Wales	**	**	**	**	24	21	14	12	34	30	35	47
UK	**	**	**	**	21	24	22	119	32	34	30	336

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2010 – 2012 (see note 5a Slide 19)

B: Percentage of Bedspace Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	41	44	40	191	41	48	46	87	48	51	51	1076
Northern Ireland	27	29	32	35	32	49	33	17	41	42	51	49
Scotland	38	38	37	33	42	49	44	39	47	52	50	21
Wales	37	42	34	21	47	50	47	16	48	44	42	47
UK	40	43	39	280	41	48	46	159	48	51	50	1193

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2010 – 2012 (see note 5a Slide 19)

A: Percentage of Bedroom Occupancy

	<£20.00				£20.00 - £29.99				£30.00 - £39.99			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	**	**	**	**	24	34	32	52	41	43	38	175
Northern Ireland	**	**	**	**	20	22	26	33	23	24	29	48
Scotland	**	**	**	**	56	34	45	22	51	47	43	66
Wales	**	**	**	**	29	29	18	12	43	40	43	47
UK	**	**	**	**	28	33	33	119	42	43	39	336

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) April 2010 – 2012 (see note 5a Slide 19)

B: Percentage of Bedroom Occupancy

	£40.00 - £49.99				£50.00 - £59.99				>£60.00			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	49	52	50	191	51	57	57	87	62	68	68	1076
Northern Ireland	38	46	45	35	41	57	43	17	47	54	70	49
Scotland	50	47	47	33	50	61	56	39	60	66	61	21
Wales	49	52	44	21	57	61	57	16	62	60	57	47
UK	49	51	49	280	51	58	57	159	62	67	66	1193

** 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 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 2012) 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 Assembly 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)

