



UNITED KINGDOM OCCUPANCY SURVEY

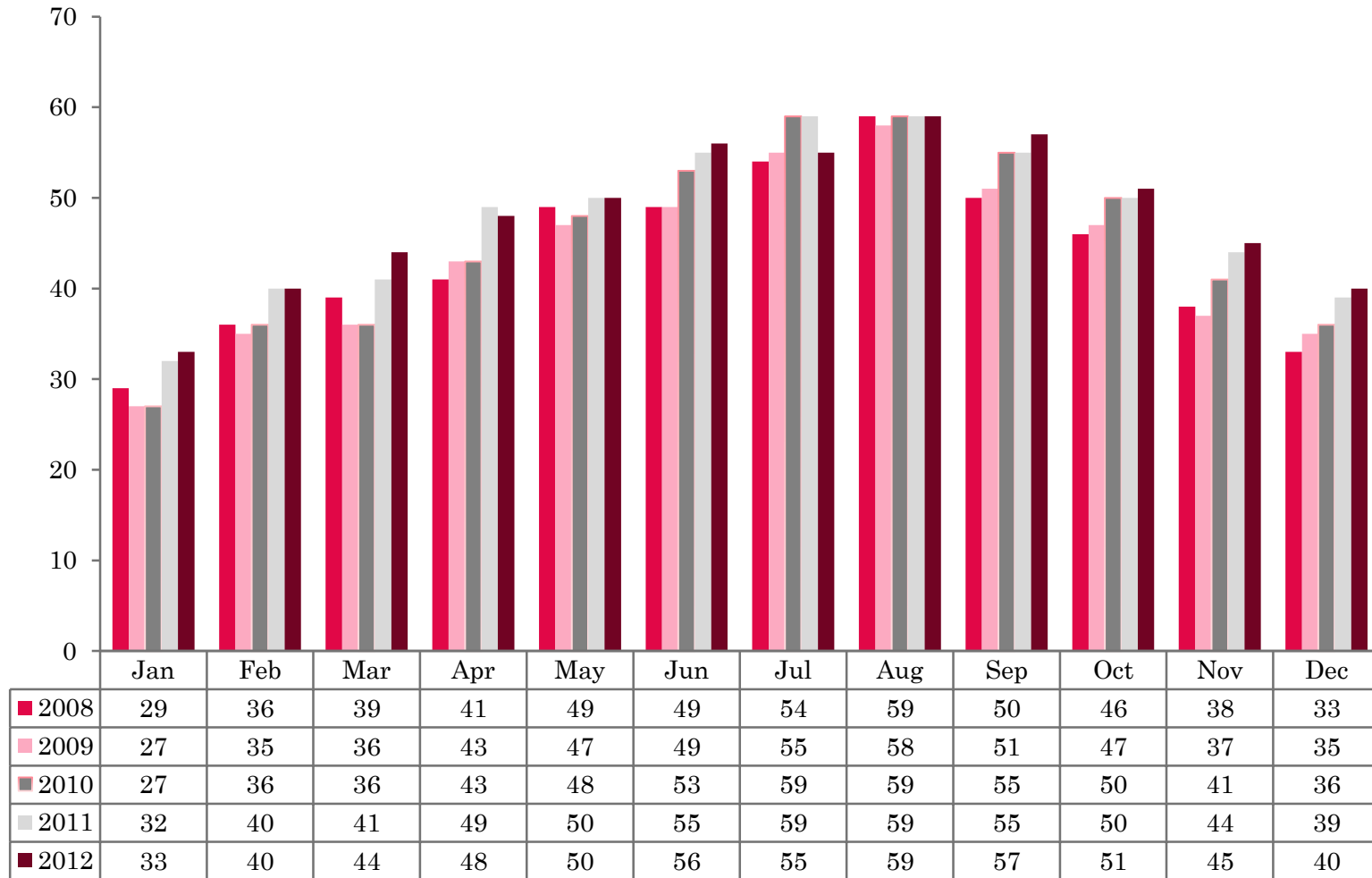
Serviced Accommodation Summary Report
December 2012

UK OCCUPANCY SURVEY

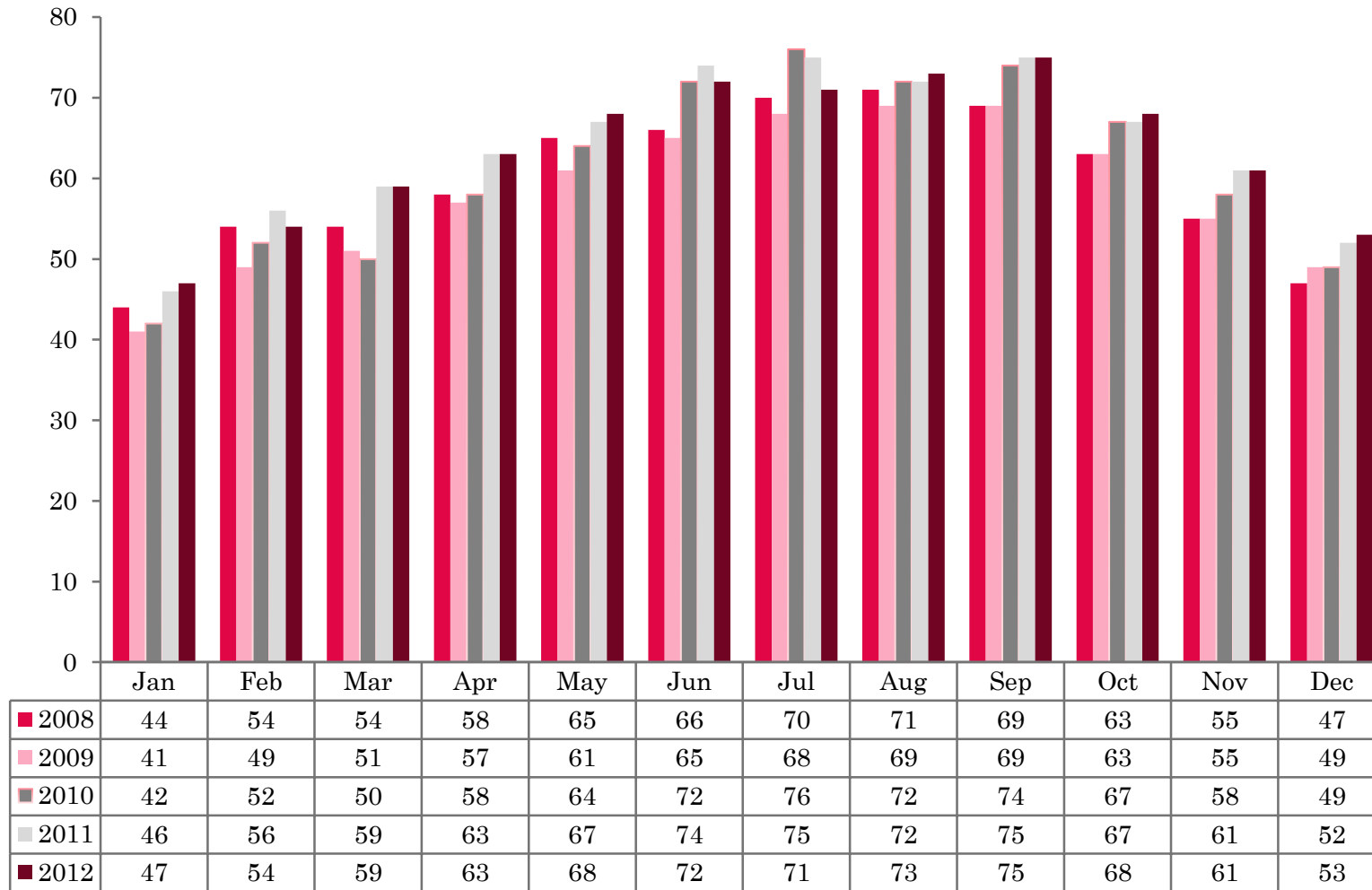
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2008 - 2012



UK BEDROOM OCCUPANCY 2008 - 2012

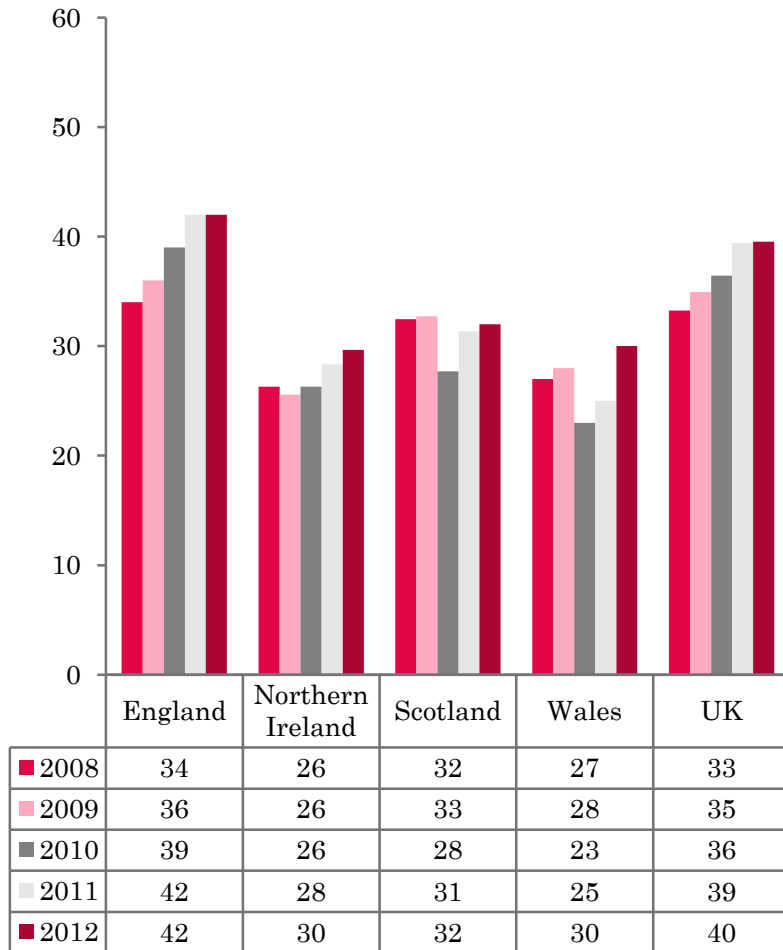


❖ 2,045 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

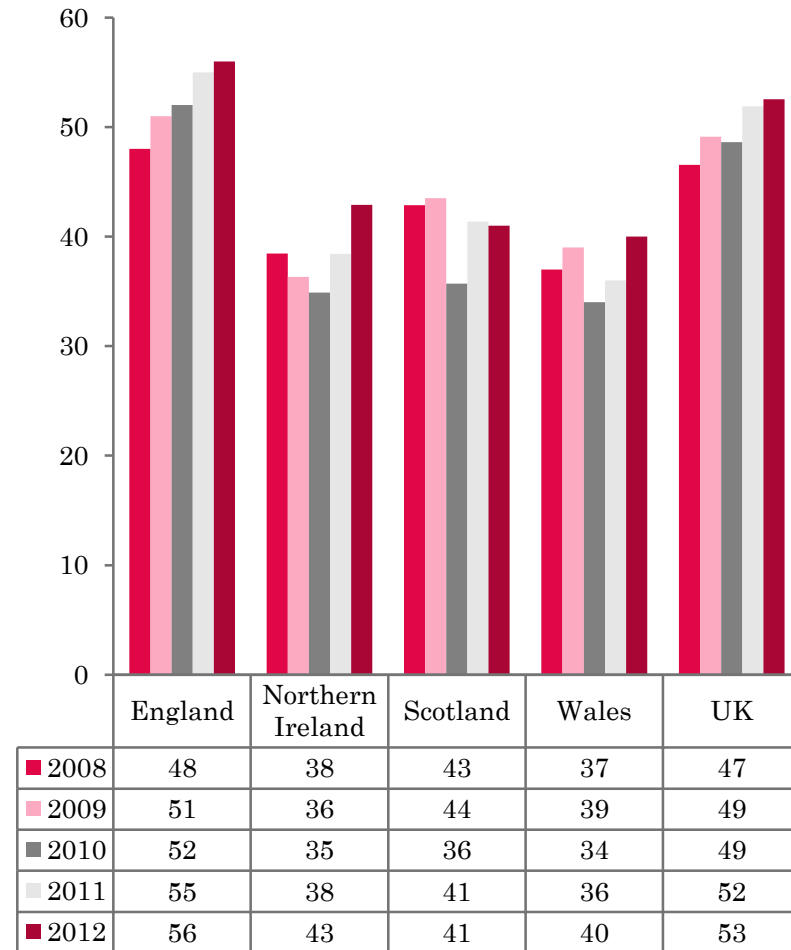
❖ Both UK bedspace occupancy (40%) and UK bedroom occupancy (53%) had risen by 1 percentage point respectively, when compared with the same period in December 2011.



NATIONAL BEDSPACE OCCUPANCY DECEMBER 2008-2012



NATIONAL ROOM OCCUPANCY DECEMBER 2008-2012



- ❖ Bedspace occupancy varied from 42% in England to 30% in Wales during December 2012. As a whole, both room and bedspace occupancy levels had either increased or remained static when compared to the previous year.
- ❖ Across the UK, both bedspace and room occupancy levels had increased when compared with 2011, rising by a single percentage point in both and at its highest level in 5 years.
- ❖ England witnessed an increase in room occupancy but remained static in bed occupancy, with room up 1 percentage point compared with December 2011.
- ❖ Bedspace occupancy levels in Scotland had risen by 1 percentage point when compared with December 2011. Room occupancy had stayed constant with the previous year.
- ❖ Northern Ireland witnessed an increase in both measures of occupancy during December 2012. Room occupancy rose by 5 percentage points, and by 2 percentage points for bedspace occupancy.
- ❖ Bedspace occupancy by non-UK residents had risen slightly during December (by 1 percentage point) with England increasing by the same percentage. Both Northern Ireland and Wales had remained at the same levels when compared to December 2011. (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: December 2010 – 2012

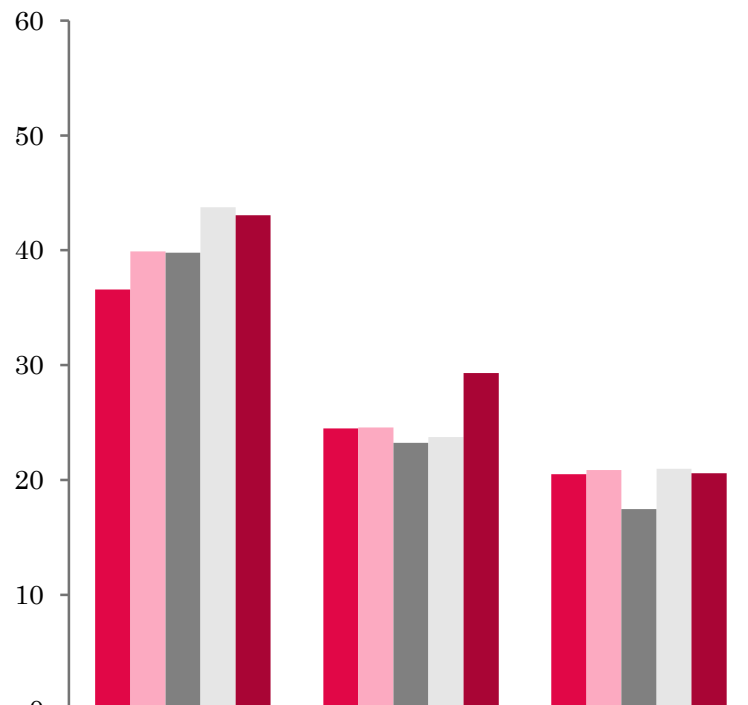
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	39	42	42	52	55	56	1536	1597	1511
Northern Ireland	26	28	30	35	38	43	145	159	139
Scotland	28	31	32	36	41	41	318	288	287
Wales	23	25	30	34	36	40	167	137	108
UK	36	39	40	49	52	53	2166	2181	2045

Table 2: UK/Non UK Occupancy Levels December 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	25	31	30	4	4	5	9	8	9	15	12	14	1536	1597	1511
Northern Ireland	17	18	19	9	11	11	29	33	27	36	37	36	145	159	139
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	318	288	287
Wales	19	22	25	1	1	1	**	**	**	7	3	4	167	137	108
UK	24	30	29	4	4	5	9	9	9	15	12	14	2166	2181	2045

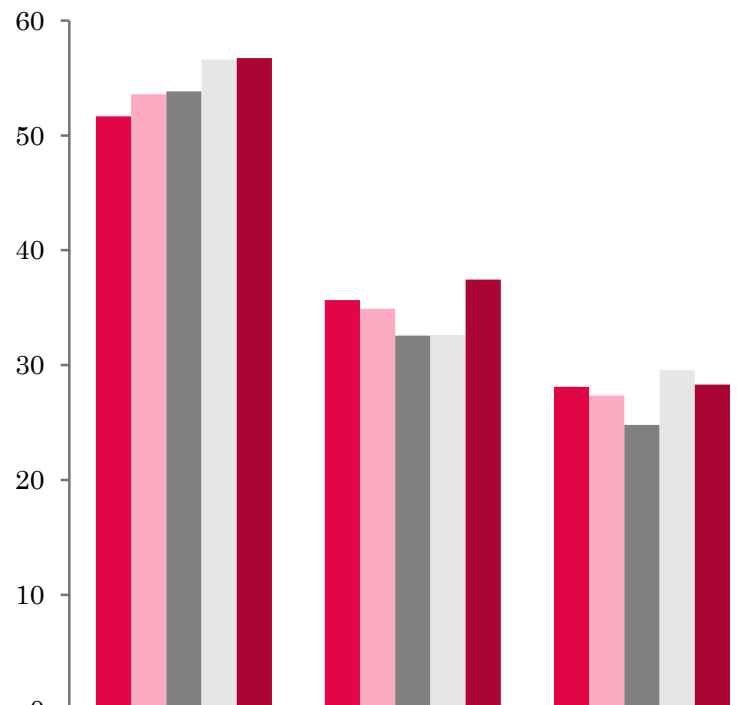
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UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION DECEMBER 2008-2012



	Hotels	Guesthouses	B&Bs
2008	37	24	21
2009	40	25	21
2010	40	23	17
2011	44	24	21
2012	43	29	21

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



	Hotels	Guesthouses	B&Bs
2008	52	36	28
2009	54	35	27
2010	54	33	25
2011	57	33	30
2012	57	37	28



- UK figures showed that occupancy levels in hotels had decreased in their bedspace occupancy levels (down 1 percentage point) and remained static in room occupancy. Bedspace occupancy levels in guesthouse accommodation had increased by 5 percentage points with room occupancy witnessing a 4 percentage point increase when compared to the same period in 2011. Bed occupancy for B&B establishments remained at the same level when compared with December 2011. (Table 3).
- Only the 26-50 size band category during December 2012 increased in both measures of occupancy, climbing 3 percentage points in bedspace and 4 percentage points in room. In the other size bands, bedspace occupancy increased in the 1-3 and 4-10 size band whilst the 11-25 and 100+ bandings remained the same as the previous year. The 51-100 size band saw a slight drop falling by 3 percentage points when compared with 2011. Room occupancy remained static in the 4-10 and 11-25 banding. Both the 1-3 and 51-100 categories witnessed a small downturn whilst the 100+ category saw an increase of 2 percentage points. (Tables 6 and 7).
- When compared with December 2011, bedroom occupancy levels in all location types had increased, with the exception of the countryside/village location, decreasing by 2 percentage points. Small towns saw the biggest increase rising by 2 percentage points when compared to 2011. Bedspace occupancy was more varied as only city/large town occupancy had increased, seaside and small towns remaining static, and countryside/village falling slightly. (Table 8).
- When looking at occupancy levels by tariff, there were increases in both bedspace and room occupancy levels for the £20.00-£29.99 and £60.00+ tariffs, when compared with December 2011. In the £30-39 and £50-59 tariff bandings both room and bed occupancy levels decreased compared to the previous year. The £40-£49 tariff band remained static in bedspace occupancy and saw a slight increase in room occupancy.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	42	46	45	57	59	59	918	1026	986
Northern Ireland	30	34	34	40	47	49	74	67	52
Scotland	32	37	37	41	49	49	222	211	214
Wales	29	31	36	42	44	49	93	77	60
UK	40	44	43	54	57	57	1307	1381	1312
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	25	26	33	35	36	42	240	218	199
Northern Ireland	14	14	38	18	20	46	14	13	8
Scotland	18	17	17	26	21	22	46	39	34
Wales	13	11	10	18	15	15	32	25	22
UK	23	24	29	33	33	37	332	295	263
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	19	23	23	27	33	32	378	353	326
Northern Ireland	12	10	11	19	13	18	57	79	7
Scotland	11	15	14	15	19	17	50	38	39
Wales	12	10	10	17	11	13	42	35	26
UK	17	21	21	25	30	28	527	505	398



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: December 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	43	46	44	36	39	39	52	55	53	52	56	57
Northern Ireland	29	31	34	20	21	24	37	41	42	31	33	36
Scotland	33	37	35	25	28	29	38	43	40	35	40	42
Wales	28	30	32	20	21	26	36	39	39	31	35	40
UK	41	44	42	33	36	36	49	52	50	48	52	53



Table 5: Non-UK Percentages: December 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	7	7	8	10	10	9	12	12	17	17	13	17
Northern Ireland	29	33	25	31	37	28	39	44	35	39	48	39
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	6	3	4	8	4	3
UK	7	8	8	10	11	10	12	12	16	17	13	16

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Table 6: Occupancy Levels by Size: December 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	15	18	19	215	22	23	24	292	32	32	32	119
Northern Ireland	6	5	5	60	20	15	24	17	19	19	20	25
Scotland	9	12	11	35	21	16	18	49	29	28	30	50
Wales	12	8	10	26	15	15	15	30	26	27	27	20
UK	14	16	17	336	21	22	23	388	31	31	31	214

Table6: Occupancy Levels by Size: December 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	35	38	41	72	44	50	47	43	46	47	47	770
Northern Ireland	26	21	31	13	25	29	32	17	41	44	39	7
Scotland	29	31	33	51	40	46	43	46	41	44	46	56
Wales	31	36	42	17	38	30	35	9	31	30	42	6
UK	34	37	40	153	43	48	45	115	44	46	46	839

Table 7: Occupancy Levels by Size: December 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	21	25	24	215	29	32	32	292	44	45	45	119
Northern Ireland	9	10	8	60	27	16	33	17	29	31	29	25
Scotland	12	16	14	35	27	22	24	49	37	36	38	50
Wales	16	10	13	26	19	20	19	30	39	37	37	20
UK	19	23	22	375	28	30	30	388	43	43	43	214

Table 7: Occupancy Levels by Size: December 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	48	49	54	72	58	60	59	43	63	64	65	770
Northern Ireland	34	37	43	13	37	44	45	17	48	53	57	7
Scotland	37	42	44	51	48	58	54	46	53	59	62	56
Wales	43	49	55	17	52	45	54	9	44	47	54	6
UK	46	48	52	153	56	59	58	115	60	62	64	839



Table 8: Occupancy Levels by Location Types: December 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	28	33	33	194	49	49	50	589	33	35	35	334	29	35	34	394
Northern Ireland	17	16	25	30	32	35	35	41	23	19	20	43	16	17	13	25
Scotland	21	26	27	36	36	41	42	121	20	20	21	61	24	28	22	69
Wales	27	29	34	29	33	31	42	13	21	23	25	18	19	19	18	48
UK	27	32	32	289	46	47	48	764	30	32	32	456	28	33	31	536

Table 8: Occupancy Levels by Location Types: December 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	37	41	43	194	64	63	64	589	47	49	51	334	40	46	45	394
Northern Ireland	23	20	34	30	42	47	52	41	35	25	27	43	21	25	20	25
Scotland	27	35	32	36	48	55	55	121	26	28	32	61	29	33	28	69
Wales	37	38	44	29	47	48	55	13	34	36	38	18	25	24	25	48
UK	36	40	41	289	61	61	62	764	43	45	47	456	37	43	41	536

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 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	**	**	**	**	15	17	19	35	20	19	15	134
Northern Ireland	**	**	**	**	14	14	11	28	11	8	7	35
Scotland	**	**	**	**	14	16	13	18	23	13	17	49
Wales	**	**	**	**	19	6	14	8	13	12	13	31
UK	**	**	**	**	15	16	18	89	20	18	15	249

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 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	21	25	26	164	27	30	30	88	42	45	45	1052
Northern Ireland	21	18	20	19	25	23	21	14	32	36	35	43
Scotland	24	21	17	31	30	34	30	34	33	40	43	155
Wales	17	20	15	12	26	34	30	12	31	30	37	45
UK	21	24	24	226	27	31	30	148	40	43	44	1295

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 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	27	32	35	27	27	22	134
Northern Ireland	**	**	**	**	21	19	23	28	17	12	11	35
Scotland	**	**	**	**	21	18	16	18	33	22	25	49
Wales	**	**	**	**	29	9	17	8	19	17	19	31
UK	**	**	**	**	24	25	29	89	27	25	22	249

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) December 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	28	33	35	164	36	40	38	88	56	59	60	1052
Northern Ireland	31	27	27	19	30	29	30	14	42	49	51	43
Scotland	33	30	26	31	37	45	41	34	40	51	54	155
Wales	19	25	22	12	35	43	39	12	43	43	50	45
UK	28	32	33	226	36	41	38	148	53	57	58	1295

** 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 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 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)

