



UNITED KINGDOM OCCUPANCY SURVEY

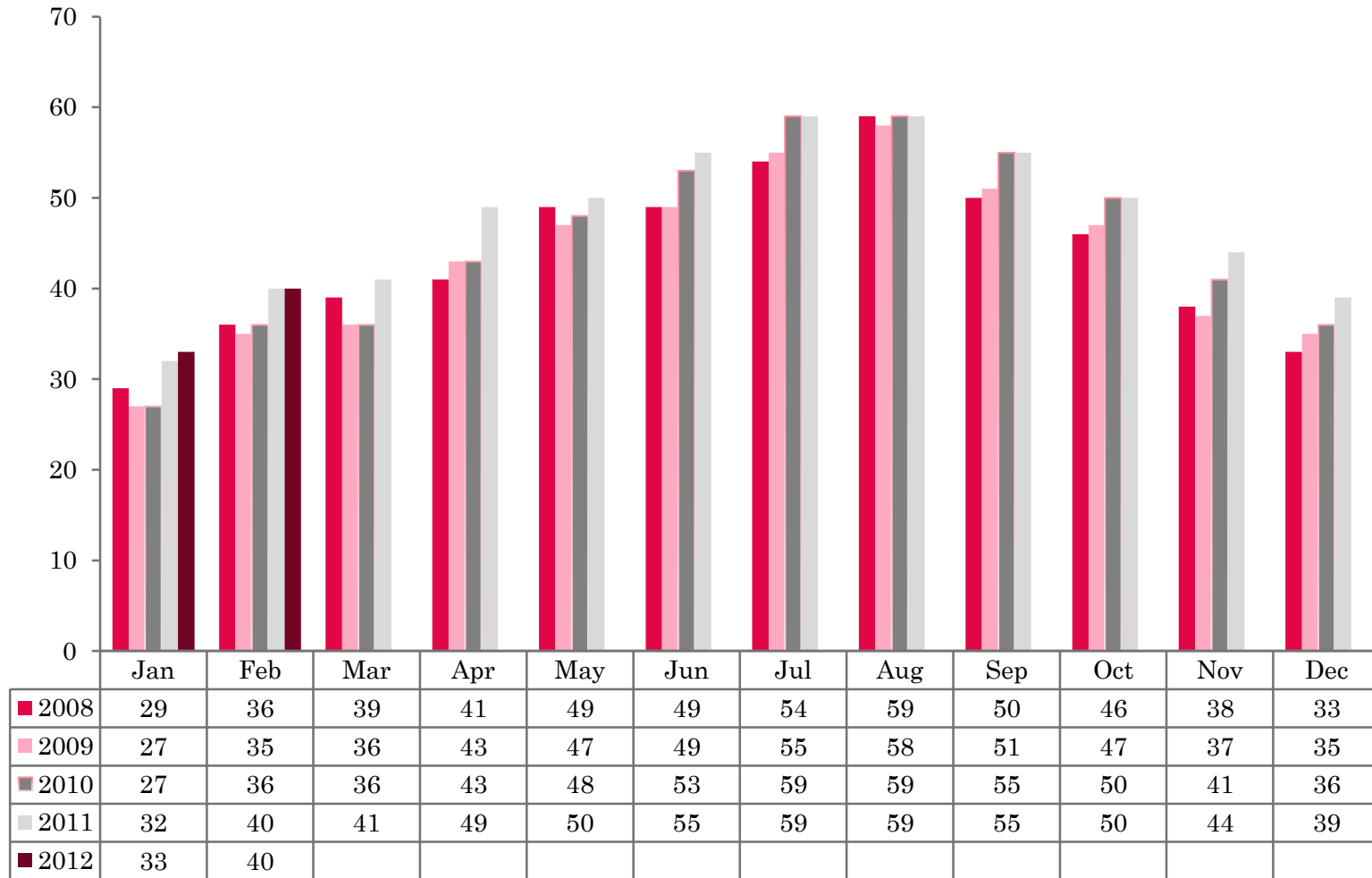
Serviced Accommodation Summary Report
February 2012

UK OCCUPANCY SURVEY

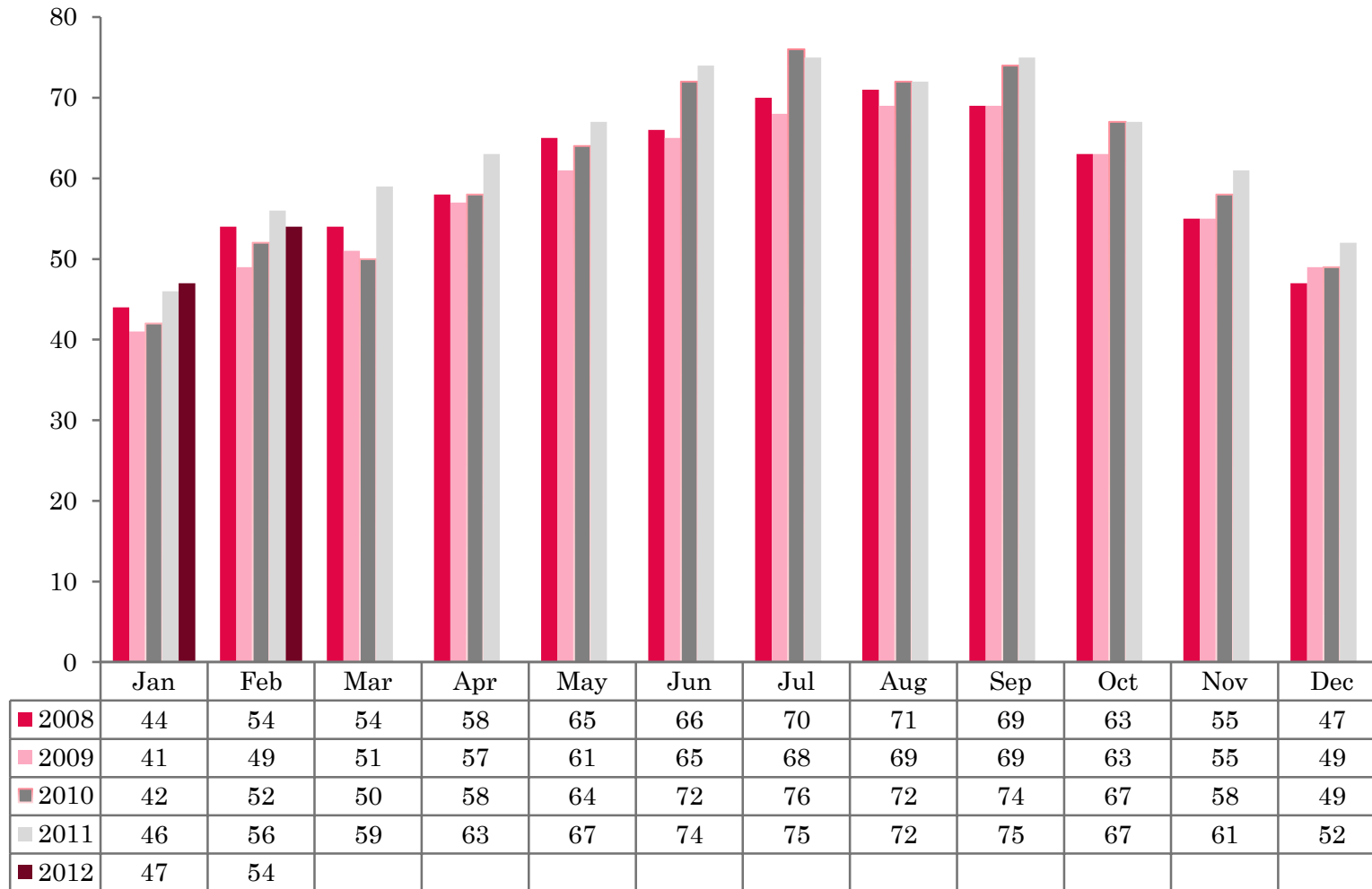
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution



UK BEDSPACE OCCUPANCY 2008 - 2012



UK BEDROOM OCCUPANCY 2008 - 2012

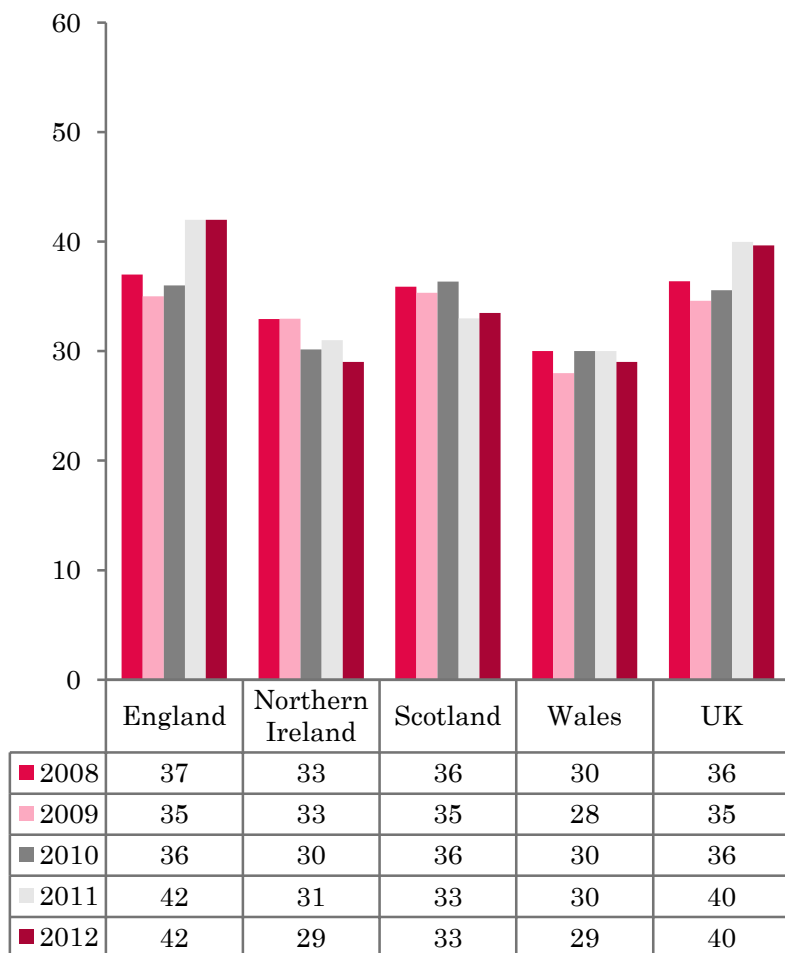


- ❖ 2176 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

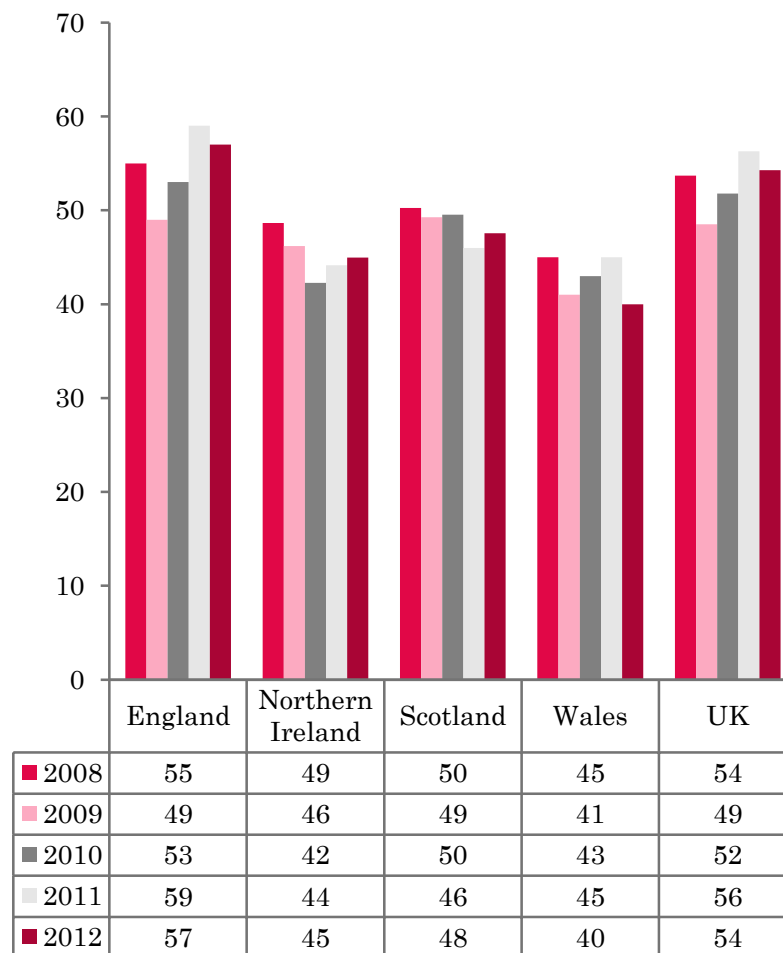
- ❖ UK bedspace (40%) had remained static whilst room occupancy (54%) had decreased 2 percentage points on the previous year.



NATIONAL BEDSPACE OCCUPANCY FEBRUARY 2008-2012



NATIONAL ROOM OCCUPANCY FEBRUARY 2008-2012



- Bedspace occupancy varied from 42% in England to 29% in Northern Ireland and Wales while room occupancy varied from 57% in England to 40% in Wales.
- When compared with February 2011, bedspace occupancy levels had remained the same in England and Scotland with both Northern Ireland and Wales witnessing a decrease (by 2 and 1 percentage points respectively). Both Northern Ireland and Scotland had increased the levels of room occupancy when compared with the same period in 2011 (1 and 2 percentage points each). Room occupancy levels in England and Wales had decreased with Wales falling from 45 percent in February 2011 to 40 percent in 2012, a drop of five percentage points.
- In the UK, bedspace occupancy had reached its highest level since 2008; room occupancy was higher in 2011. In England both bedspace and room occupancy levels were up (bed by 5 percentage points and room by 2). Bedspace occupancy levels in Northern Ireland, Scotland and Wales fell by 4, 3 and 1 percentage points respectively.
- Bedspace occupancy by non-UK residents remained at its February 2011 level in Northern Ireland and Wales but England had seen a small decrease of 1 percentage point compared 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: February 2010 - 2012

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	36	42	42	53	59	57	1087	1598	1582
Northern Ireland	30	31	29	42	44	45	143	206	176
Scotland	36	33	33	50	46	48	323	331	297
Wales	30	30	29	43	45	40	172	155	121
UK	36	40	40	52	56	54	1725	2290	2176

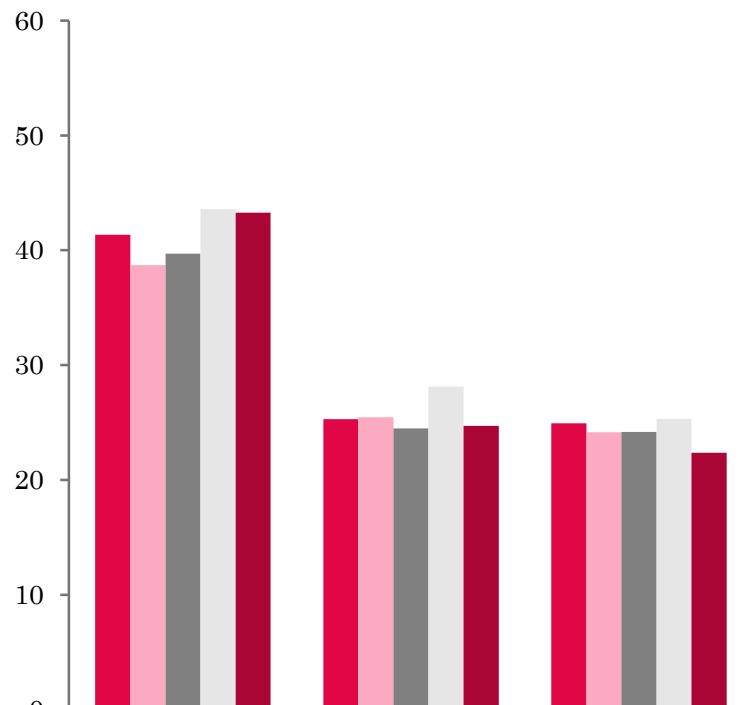
Table 2: UK/Non UK Occupancy Levels February 2010 – 2012 (see note 5a and 5b Slide 19)

	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	29	29	31	3	5	4	8	9	8	10	15	11	1087	1598	1582
Northern Ireland	20	20	18	10	11	11	25	30	31	35	37	39	143	206	176
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	323	331	297
Wales	26	25	25	1	1	1	**	**	**	5	5	4	172	155	121
UK	29	29	30	3	5	4	8	9	9	10	15	11	1725	2290	2176

** FIGURES NOT AVAILABLE

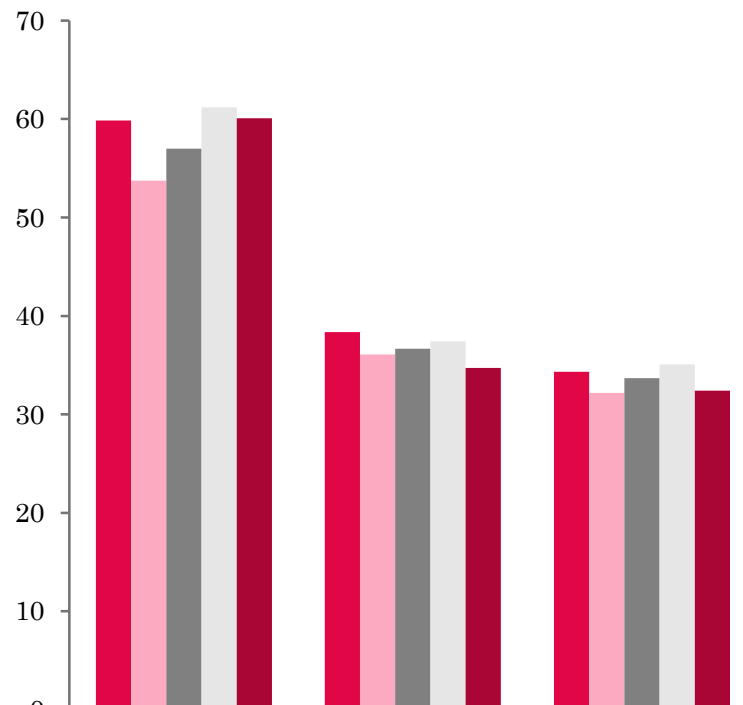


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION FEBRUARY 2008-2012



	Hotels	Guesthouses	B&Bs
2008	41	25	25
2009	39	25	24
2010	40	25	24
2011	44	28	25
2012	43	25	22

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



	Hotels	Guesthouses	B&Bs
2008	60	38	34
2009	54	36	32
2010	57	37	34
2011	61	37	35
2012	60	35	32



- ❖ Across the UK, occupancy levels in all types of accommodation had decreased (between 1 and 3 percentage points for both room and bed occupancy) (Table 3).
- ❖ When compared with February 2011, bedspace occupancy across the UK had remained static in two of the six size categories (26 - 50 and 51 – 100) with the other four categories falling by between 1 and 4 percentage points. Only the 51-100 size category saw a small increase in room occupancy, by 1 percentage point (Tables 6).
- ❖ When compared with the same period in 2011, UK bedspace occupancy levels rose in both small town and countryside/village locations (by 1 and 4 percentage points respectively) in both small town and countryside/village locations. Room occupancy at seaside locations had risen by 1 percentage point and remained the same for countryside/village locations. Occupancy levels in City/large town locations had fallen for both bedspace and room occupancy by 3% and 4% respectively (Table 8).
- ❖ Across the UK, occupancy levels fell in all tariff bands (by between 1 and 4 percentage points), except for £60.00 (where bed occupancy remained the same) and £50.00-£59.99 where room occupancy also remained static (tables 9 and 10 and note 5a, Slide 19).



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	40	45	45	58	63	62	349	962	1002
Northern Ireland	38	37	36	53	53	56	68	71	61
Scotland	40	39	39	54	54	55	220	235	219
Wales	36	36	34	51	54	50	95	91	69
UK	40	44	43	57	61	60	732	1359	1351
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	25	30	27	38	40	38	289	250	227
Northern Ireland	11	22	17	16	32	24	15	23	20
Scotland	25	23	20	35	30	28	54	52	36
Wales	21	16	11	29	20	15	34	22	21
UK	25	28	25	37	37	35	392	347	304
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	26	28	24	36	39	35	446	386	353
Northern Ireland	7	11	8	10	16	13	60	112	95
Scotland	19	14	19	28	19	28	49	44	42
Wales	16	17	16	22	21	19	43	42	31
UK	24	25	22	34	35	32	598	584	521



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: February 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	33	43	44	40	41	40	55	53	53	50	62	61
Northern Ireland	41	35	36	27	24	25	51	46	50	45	40	46
Scotland	42	39	39	32	30	31	49	46	47	50	47	49
Wales	35	35	32	26	26	26	43	45	39	42	45	40
UK	34	42	42	38	38	37	53	52	51	49	59	58



Table 5: Non-UK Percentages: February 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	9	8	7	7	10	9	11	14	10	9	16	12
Northern Ireland	23	30	35	28	34	37	35	38	43	39	39	47
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	4	3	4	5	5
UK	9	8	8	7	11	10	11	14	10	9	16	12

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Table 6: Occupancy Levels by Size: February 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	21	21	19	235	26	26	24	331	32	35	30	119
Northern Ireland	3	7	6	78	10	18	13	29	26	26	23	27
Scotland	18	13	18	39	26	25	20	48	33	29	33	54
Wales	15	13	10	28	23	23	18	34	31	30	28	23
UK	20	19	18	380	25	26	23	442	32	34	30	223

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

B: Percentage of Bedspace 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	40	39	39	84	49	45	45	43	38	49	48	770
Northern Ireland	28	26	25	14	35	36	34	19	47	44	44	9
Scotland	33	34	37	56	50	45	44	47	48	48	46	53
Wales	36	37	37	18	41	35	39	13	47	41	38	5
UK	39	38	38	172	48	44	44	122	40	48	47	837



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

A: 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	30	29	27	235	36	36	34	331	44	48	43	119
Northern Ireland	5	11	11	78	15	23	18	29	37	42	32	27
Scotland	27	17	26	39	36	34	31	48	44	42	43	54
Wales	19	18	11	28	32	28	24	34	40	43	43	23
UK	28	27	25	375	35	35	33	442	44	47	43	223

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

B: 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	55	55	52	84	63	63	64	43	63	69	68	770
Northern Ireland	42	44	48	14	51	55	56	19	63	57	62	9
Scotland	45	49	50	56	66	61	62	47	66	67	65	53
Wales	50	52	53	18	59	59	58	13	65	64	56	5
UK	53	54	52	172	63	62	63	122	63	68	67	837



Table 8: Occupancy Levels by Location: February 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	31	213	45	50	47	584	32	36	37	360	28	32	37	425
Northern Ireland	25	29	31	37	35	37	37	58	29	21	14	50	20	13	10	31
Scotland	29	30	29	34	43	43	41	118	30	24	26	65	30	24	28	80
Wales	34	32	31	33	48	43	37	13	25	23	29	17	25	27	22	58
UK	28	33	31	317	45	48	45	773	31	33	34	492	28	30	34	594

Table 8: Occupancy Levels by Location: February 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	40	41	43	213	64	68	65	584	50	56	55	360	41	47	47	425
Northern Ireland	33	38	35	37	50	53	55	58	40	30	26	50	28	19	14	31
Scotland	37	40	41	34	60	62	60	118	43	36	40	65	41	33	37	80
Wales	44	44	41	33	67	64	55	13	40	46	44	17	34	36	31	58
UK	40	41	42	317	63	67	63	773	48	52	51	492	40	44	44	594

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	12	11	47	20	22	20	176
Northern Ireland	**	**	**	**	6	10	5	34	6	12	11	51
Scotland	**	**	**	**	27	17	17	21	30	21	23	57
Wales	**	**	**	**	16	13	8	9	17	17	17	35
UK	**	**	**	**	16	13	11	111	21	21	20	319

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	26	29	26	173	32	35	32	83	40	44	44	1061
Northern Ireland	22	25	26	31	31	27	29	15	40	39	36	45
Scotland	34	26	24	30	39	38	38	38	43	41	41	151
Wales	28	27	23	16	40	42	44	17	37	35	32	44
UK	27	28	26	250	33	36	34	153	40	43	43	1301

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 2010 – 2012 (see note 5a 17)

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	**	**	**	**	23	22	22	47	30	31	29	176
Northern Ireland	**	**	**	**	9	16	9	34	10	17	17	51
Scotland	**	**	**	**	41	23	26	21	44	32	38	57
Wales	**	**	**	**	22	17	10	9	24	23	20	35
UK	**	**	**	**	25	22	21	111	31	30	29	319

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) February 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	37	37	34	173	45	48	47	83	56	62	61	1061
Northern Ireland	32	38	38	31	43	34	35	15	56	54	56	45
Scotland	50	36	35	30	49	47	50	38	58	58	56	151
Wales	43	36	32	16	50	54	57	17	53	56	48	44
UK	39	37	34	250	46	48	48	153	56	61	59	1301

** 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 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)

