



UNITED KINGDOM OCCUPANCY SURVEY

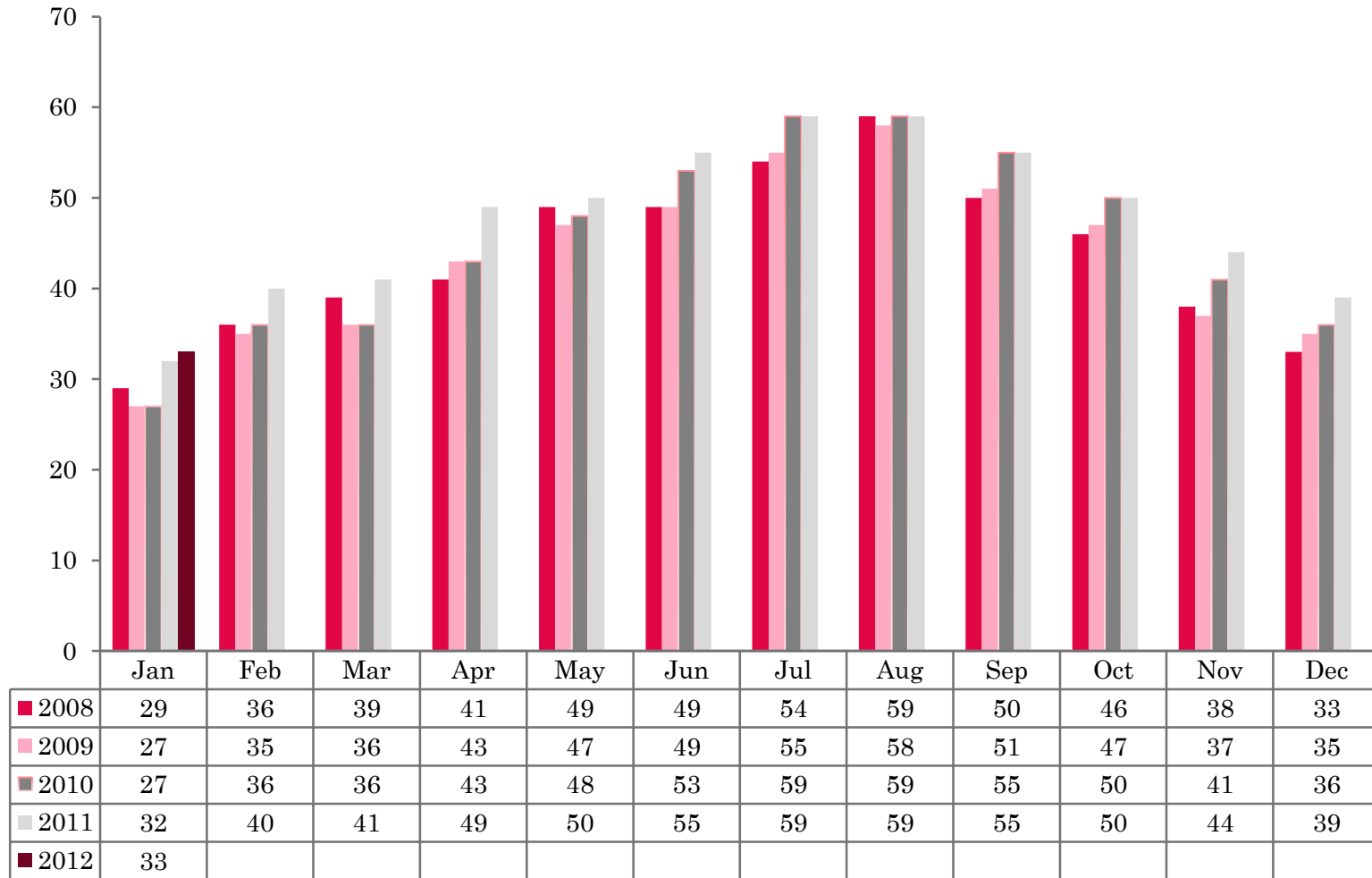
Serviced Accommodation Summary Report
January 2012

UK OCCUPANCY SURVEY

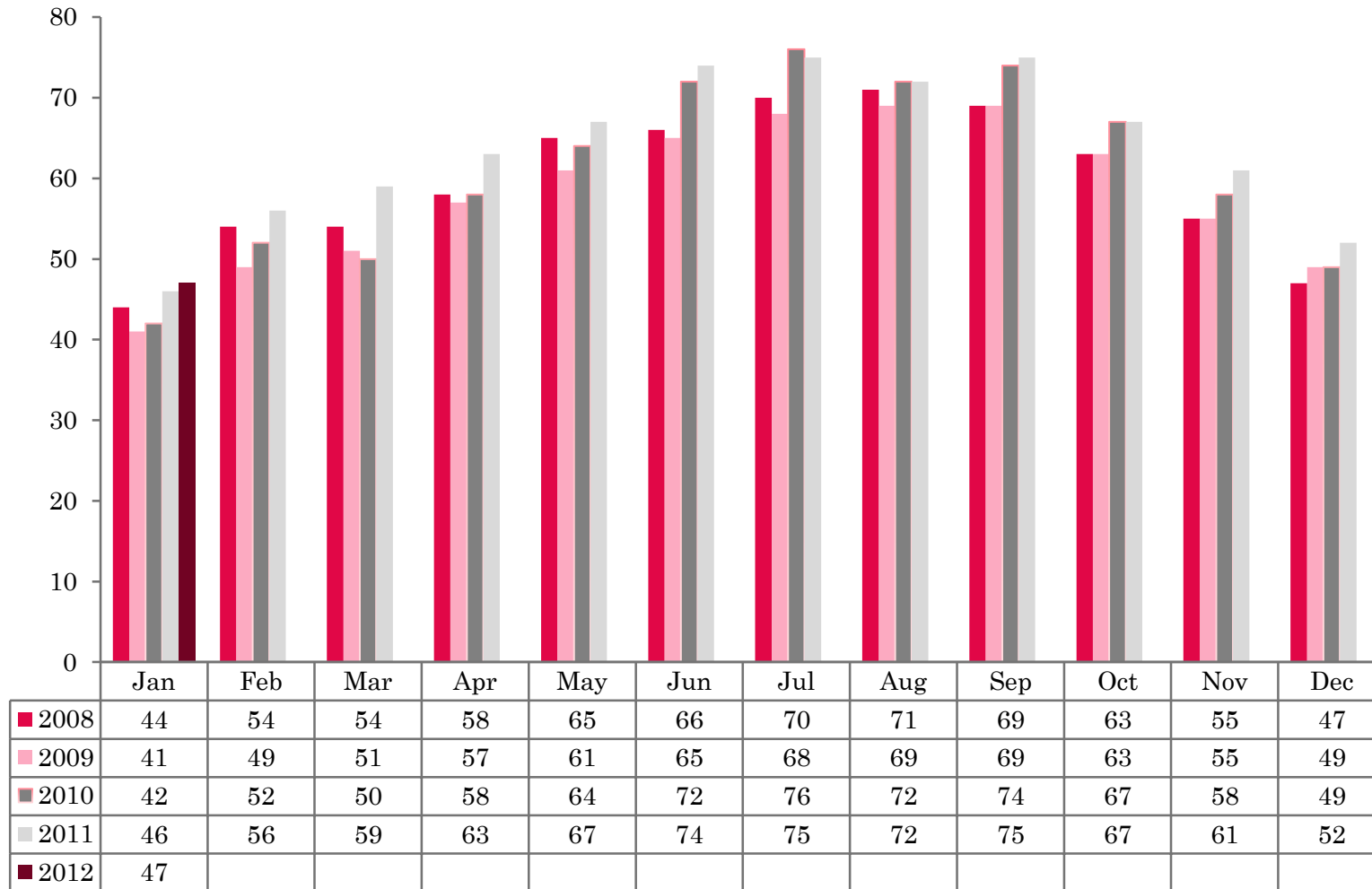
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution



UK BEDSPACE OCCUPANCY 2008 - 2012



UK BEDROOM OCCUPANCY 2008 - 2012



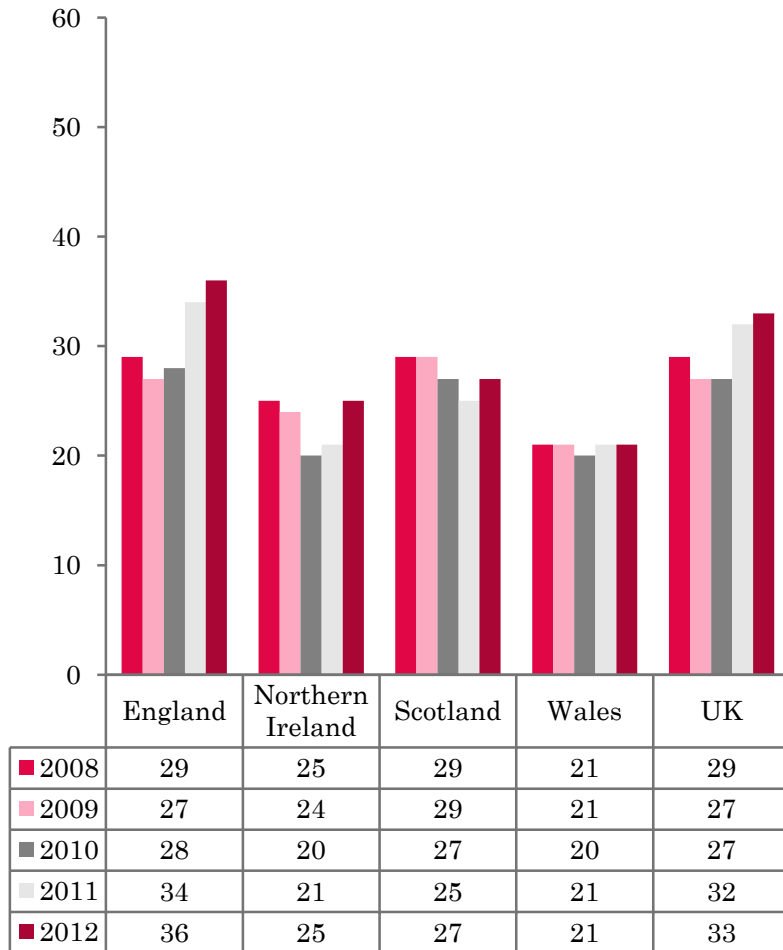
- ❖ 2151 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates.



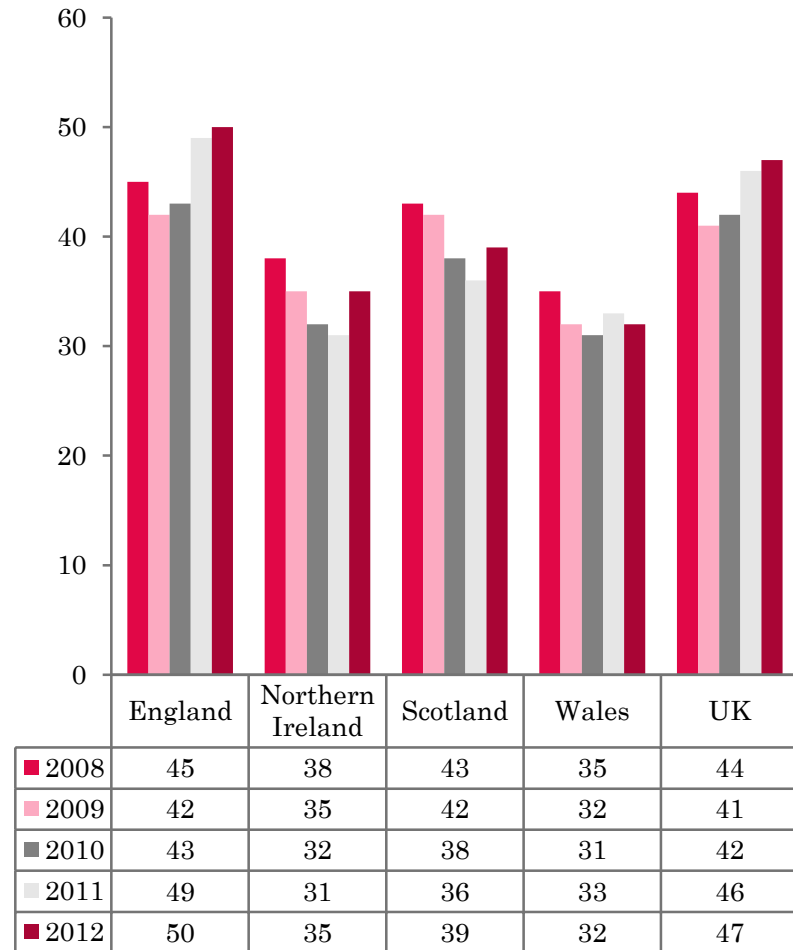
- ❖ Both UK bedspace (33%) and room occupancy (47%) had risen in January 2012, with only a 1% percentage point increase on the previous year.



NATIONAL BEDSPACE OCCUPANCY JANUARY 2008-2012



NATIONAL ROOM OCCUPANCY JANUARY 2008-2012



- ❖ Bedspace occupancy varied from 36% in England to 21% in Wales while room occupancy varied from 50% in England to 32% in Wales.
- ❖ When compared with January 2011, occupancy levels rose in Northern Ireland, Scotland and England (by 4, 2 and 2 percentage points respectively). In Wales, bedspace occupancy remained the same, with room occupancy seeing a decrease of 1 percentage point.
- ❖ Occupancy levels for the UK as a whole had reached the highest levels in the last 5 years, up 4 percentage points for bedspace occupancy and 3 for room occupancy. While occupancy levels for England mirrored those of the UK as a whole (being 7 and 5 percentage points than in 2008), levels in Northern Ireland, Scotland and Wales had either remained at their 2008 level (bedspace occupancy in Northern Ireland and Wales or had fallen (by up to 4 percentage points).
- ❖ Bedspace occupancy by non-UK residents remained at its January 2011 level in England and Wales with Northern Ireland seeing an increase of 4 percentage points 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: January 2010 - 2012

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	28	34	36	43	49	50	1025	1567	1541
Northern Ireland	20	21	25	32	31	35	140	196	186
Scotland	27	25	27	38	36	39	305	324	296
Wales	20	21	21	31	33	32	152	153	128
UK	27	32	33	42	46	47	1622	2240	2151

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

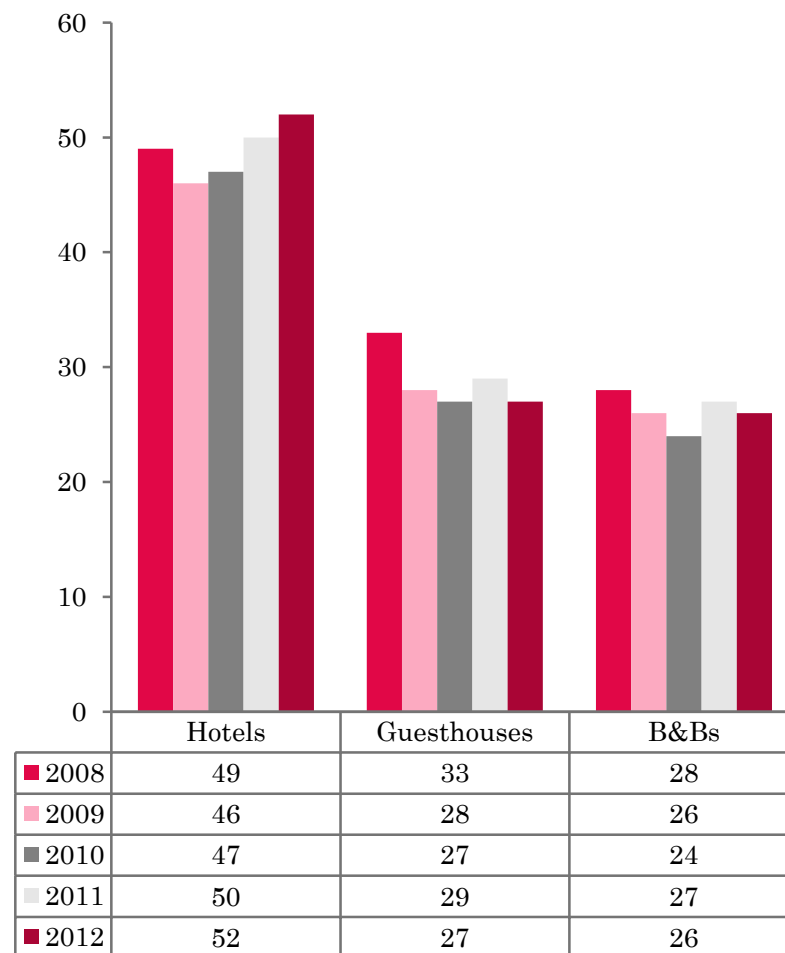
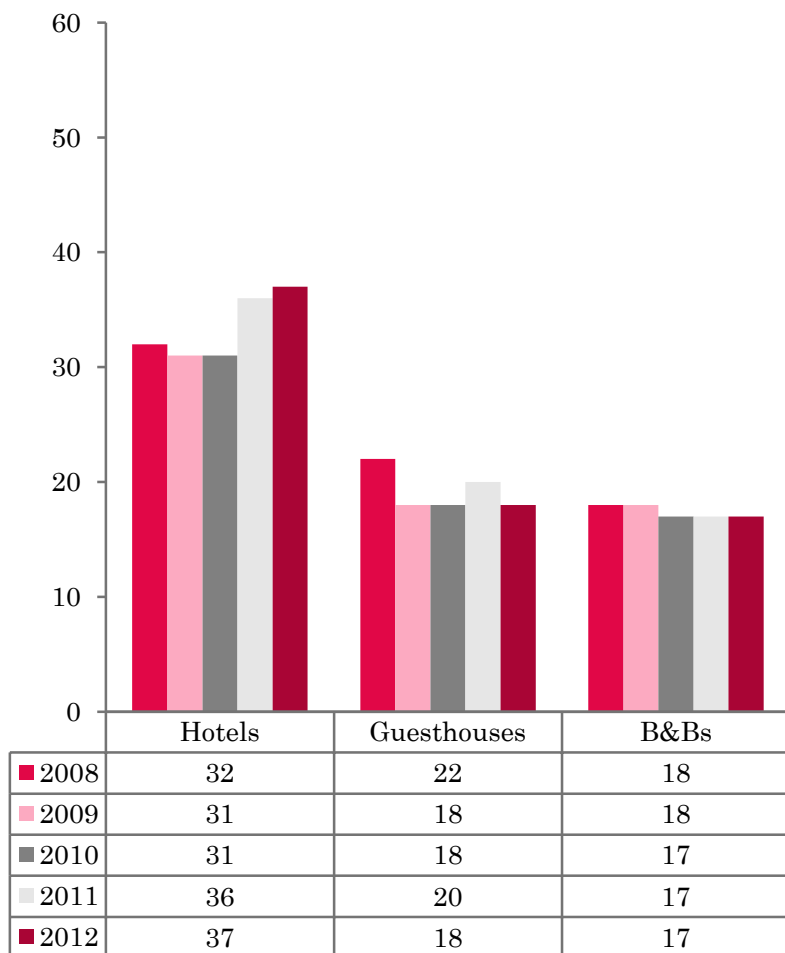
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	19	21	24	5	5	5	20	13	11	22	20	17	1025	1567	1541
Northern Ireland	14	14	15	7	7	11	30	31	28	32	33	42	140	182	186
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	305	324	296
Wales	16	19	19	1	1	1	**	**	**	6	6	6	152	153	128
UK	19	21	23	5	5	5	20	13	11	21	20	17	1622	2240	2151

** FIGURES NOT AVAILABLE



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

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



- ❖ Levels in hotels has risen (by 2 percentage points for room occupancy and by 1 for bedspace). In guest houses occupancy levels had decreased (by 2 percentage points for both room and bed occupancy) while in bed and breakfast establishments bespace occupancy had remained as in January 2011 but room occupancy had fallen (by 1 percentage point). (Table 3).
- ❖ When compared with January 2011, only two of the six size categories (26 – 50 and 51 – 100) saw a rise in both room and bedspace occupancy (of 2 percentage points for bedspace occupancy and 1 for room occupancy (26-50 size band) and 1 percentage pointy for bedspace occupancy and 2 percentage points for room occupancy (51-100 size band). (Tables 6 and 7).
- ❖ When compared with January 2011, occupancy levels rose (by between 1 and 4 percentage points) in three of the four location types. Only city/large town locations saw a decrease in occupancy levels (or 1 percentage point for both room and bedspace occupancy). (Table 8).
- ❖ Occupancy levels had remained as in January 2011 in three tariff bands (those lying between £30.00 and £59.99). Those establishments in the £20.00-£29.99 band saw both measures of occupancy fall while in the most expensive tariff band (>£60.00) bedspace occupancy remained unchanged with room occupancy rising by one percentage point. (see table's 9 and 10 and note 5a, Slide 19).



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	32	37	39	48	52	54	344	965	984
Northern Ireland	23	26	31	39	37	43	70	71	64
Scotland	31	32	32	43	44	45	207	232	217
Wales	26	26	26	38	40	39	83	90	74
UK	31	36	37	47	50	52	704	1358	1339
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	19	22	20	29	32	30	264	232	215
Northern Ireland	14	14	15	17	18	21	13	17	22
Scotland	15	13	12	23	21	17	50	50	39
Wales	11	13	10	17	17	14	30	20	25
UK	18	20	18	27	29	27	357	319	301
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	18	19	18	26	30	28	415	370	342
Northern Ireland	17	9	6	11	15	9	57	9	100
Scotland	12	10	14	17	15	21	48	42	40
Wales	10	9	9	14	13	12	39	39	29
UK	17	17	17	24	27	26	559	460	511



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: January 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	27	34	36	29	34	35	47	54	44	39	42	54
Northern Ireland	30	25	31	21	17	19	38	32	37	35	29	35
Scotland	30	27	29	25	24	26	35	33	36	40	39	42
Wales	22	24	23	19	19	19	28	30	29	33	34	33
UK	27	32	34	28	31	32	44	49	42	39	41	50



Table 5: Non-UK Percentages: January 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	21	15	10	18	11	12	22	21	16	21	19	17
Northern Ireland	28	28	18	35	38	26	32	33	45	36	38	45
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	5	4	6	7	7
UK	21	15	10	18	12	12	21	20	16	20	19	17

**** FIGURES NOT AVAILABLE**



Table 6: Occupancy Levels by Size: January 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	14	15	13	229	18	18	18	311	22	25	23	117
Northern Ireland	4	5	4	82	15	16	8	28	18	17	20	28
Scotland	9	9	11	36	18	15	16	54	22	23	27	53
Wales	8	8	7	25	13	15	13	38	22	24	22	28
UK	13	14	12	372	18	17	17	431	22	24	23	226

Table 6: Occupancy Levels by Size: January 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	30	31	33	80	40	38	40	37	32	41	42	767
Northern Ireland	12	22	19	17	21	24	25	20	34	33	40	11
Scotland	24	26	27	52	44	38	35	48	37	38	37	53
Wales	27	27	30	19	31	28	23	10	32	29	29	8
UK	29	30	32	168	40	37	38	115	33	40	40	839



Table 7: Occupancy Levels by Size: January 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	22	23	20	229	27	28	27	311	33	38	35	117
Northern Ireland	6	8	9	82	19	26	10	28	29	24	30	28
Scotland	13	13	16	36	25	23	21	54	31	34	39	53
Wales	11	11	10	25	20	20	18	38	31	38	34	28
UK	20	21	19	372	26	27	25	431	33	37	35	226

Table 7: Occupancy Levels by Size: January 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	42	45	45	80	52	52	55	37	54	59	61	767
Northern Ireland	25	33	35	17	34	39	43	20	49	42	47	11
Scotland	34	37	40	52	56	50	50	48	53	55	53	53
Wales	40	37	48	19	45	45	38	10	46	44	43	8
UK	41	43	44	168	52	51	53	115	53	57	58	839



Table 8: Occupancy Levels by Location: January 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	20	24	25	199	35	44	44	578	24	28	30	352	18	22	27	412
Northern Ireland	14	20	16	45	22	27	32	56	22	14	16	54	19	11	10	31
Scotland	19	18	25	36	33	34	34	117	22	20	22	64	24	19	17	79
Wales	24	24	22	31	38	32	27	16	12	14	20	21	15	18	17	60
UK	20	23	25	311	35	42	41	767	23	26	28	491	19	21	25	582

Table 8: Occupancy Levels by Location: January 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	30	35	36	199	53	59	58	578	39	44	47	352	29	36	38	412
Northern Ireland	24	26	21	45	36	39	44	56	32	20	22	54	27	16	16	31
Scotland	27	26	34	36	47	49	51	117	32	29	32	64	31	26	24	79
Wales	32	33	30	31	53	46	43	16	20	30	35	21	22	26	25	60
UK	30	33	35	311	52	57	56	767	37	41	44	491	29	34	35	582

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 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	**	**	**	**	12	11	8	48	14	15	14	165
Northern Ireland	**	**	**	**	8	9	6	36	7	10	5	54
Scotland	**	**	**	**	23	9	13	25	21	13	17	51
Wales	**	**	**	**	14	13	7	8	11	11	12	36
UK	**	**	**	**	13	11	9	117	15	14	14	306

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 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	18	19	19	160	26	26	25	77	30	37	38	1051
Northern Ireland	15	16	19	31	18	20	17	45	25	27	33	50
Scotland	24	19	21	35	28	26	28	38	34	34	33	147
Wales	15	17	18	18	34	32	32	13	26	27	25	53
UK	18	19	19	244	27	26	26	173	30	36	36	1301

**** FIGURES NOT AVAILABLE**

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 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	**	**	**	**	18	20	15	48	22	24	23	165
Northern Ireland	**	**	**	**	9	16	10	36	10	14	9	54
Scotland	**	**	**	**	36	15	16	25	30	23	27	51
Wales	**	**	**	**	18	17	12	8	17	16	18	36
UK	**	**	**	**	20	19	15	117	22	23	23	306

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) January 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	26	26	26	160	37	37	36	77	45	52	54	1051
Northern Ireland	25	28	29	31	26	26	23	45	42	38	44	50
Scotland	34	29	31	35	37	33	39	38	47	48	48	147
Wales	26	27	27	18	40	43	41	13	39	41	38	53
UK	27	27	27	244	37	36	36	173	45	51	52	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)

