



# UNITED KINGDOM OCCUPANCY SURVEY

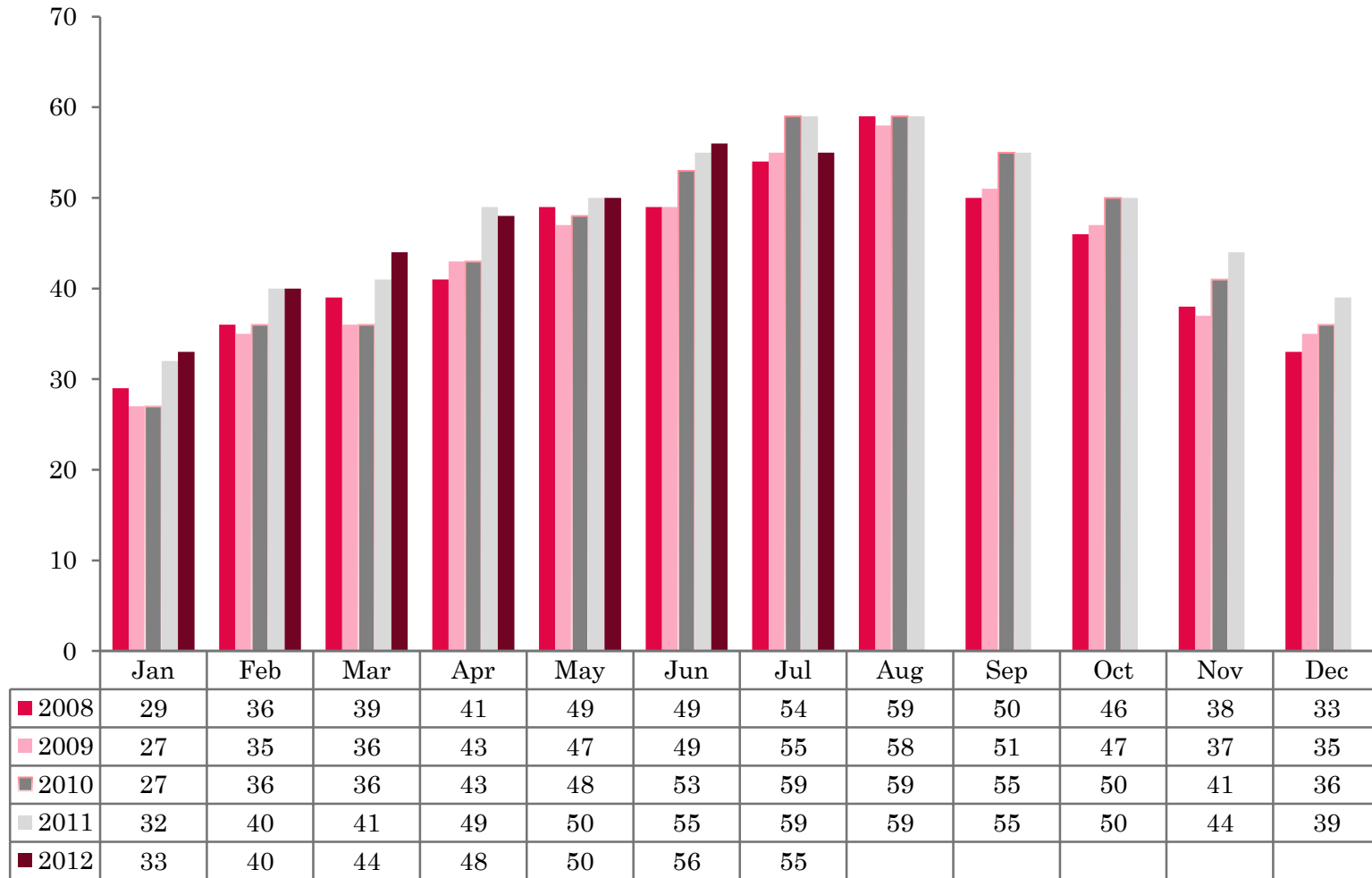
Serviced Accommodation Summary Report  
July 2012

# UK OCCUPANCY SURVEY

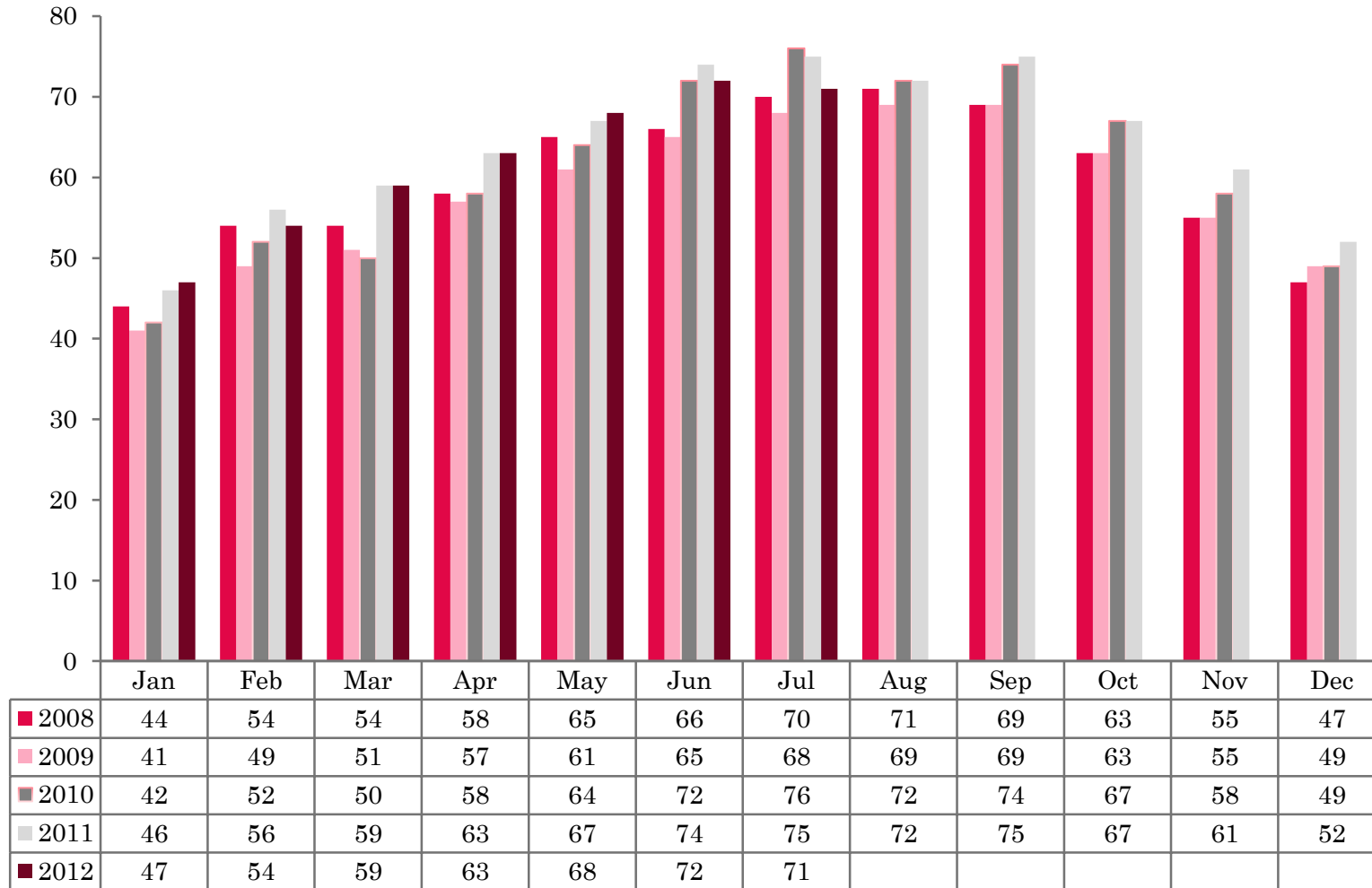
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2008 - 2012



# UK BEDROOM OCCUPANCY 2008 - 2012

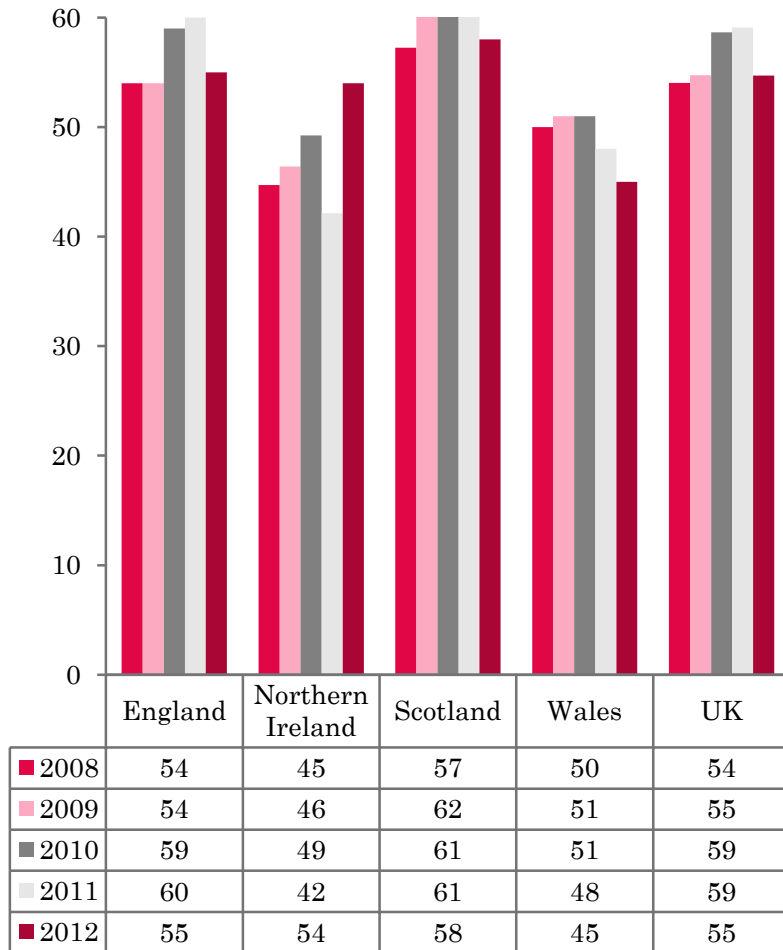


❖ 2,248 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

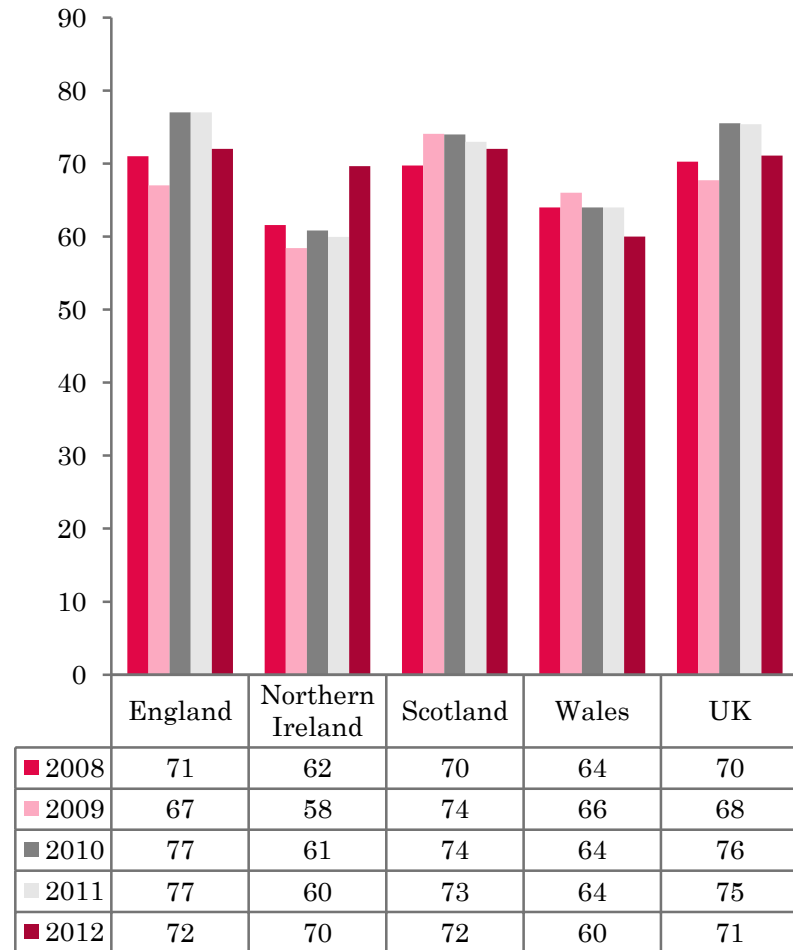
❖ UK bedspace occupancy in July (55%) fell by four percentage points (at its lowest level since 2009). UK bedroom occupancy (71%) also fell by four percentage points when compared with 2011.



## NATIONAL BEDSPACE OCCUPANCY JULY 2008-2012



## NATIONAL ROOM OCCUPANCY JULY 2008-2012



- ❖ Bedspace occupancy varied from 55% in England to 45% in Wales. Both England and Scotland achieved 72% room occupancy in July, compared to just 60% in Wales.
- ❖ During July 2012, both bedspace and room occupancy levels in the UK were at their lowest level since 2009, falling by four percentage points respectively since 2011.
- ❖ Occupancy levels in England had fallen by 5 percentage points for both measures of occupancy when compared with July 2011. Only Northern Ireland had witnessed an increase in both room and bedspace occupancy (by 10 percentage points for room, and 12 percentage points for bedspace occupancy).
- ❖ Both Wales and Scotland were down 3 percentage points for bedspace occupancy levels. However, Scotland fared slightly better in room occupancy, with only a 1 percentage drop compared with the same period in 2011.
- ❖ Bedspace occupancy by non-UK residents saw a slight fall in England, Wales and Northern Ireland 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: July 2010 – 2012**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	59	60	55	77	77	72	1682	1725	1613
Northern Ireland	49	42	54	61	60	70	146	176	160
Scotland	61	61	58	74	73	72	399	373	326
Wales	51	48	45	64	64	60	201	172	149
<b>UK</b>	59	59	55	76	75	71	2428	2446	2248

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

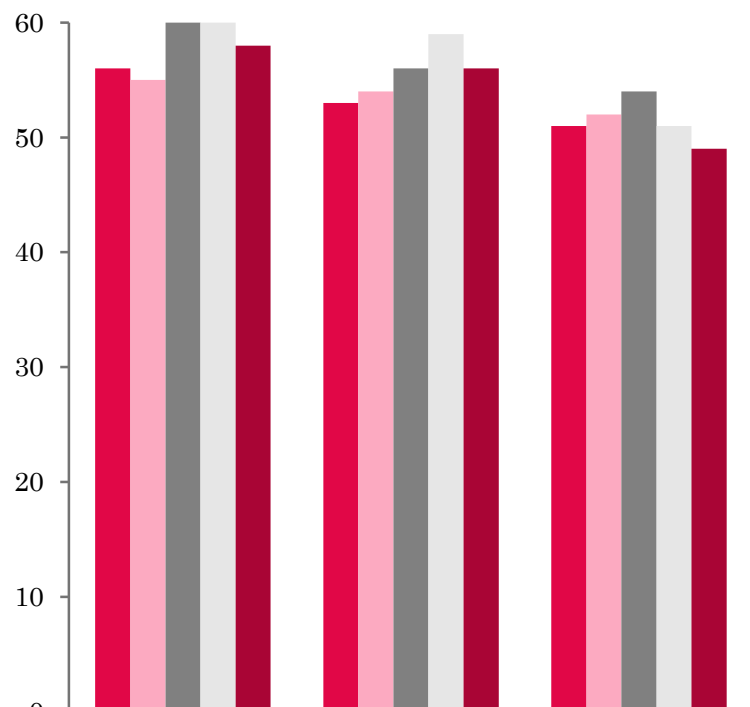
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	49	50	45	9	9	8	11	15	14	15	16	16	1682	1725	1613
Northern Ireland	29	22	36	21	20	18	32	34	34	42	47	34	146	176	160
Scotland	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Wales	43	44	40	5	5	4	***	***	***	10	10	10	201	172	149
<b>UK</b>	48	49	44	9	9	8	11	15	15	15	16	16	2428	2446	2248

\*\* FIGURES NOT AVAILABLE



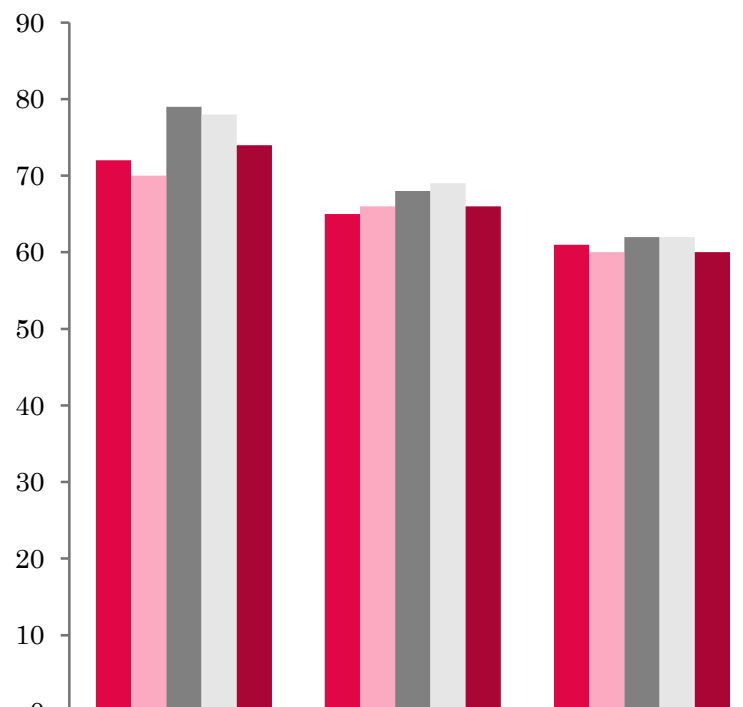


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JULY 2008-2012



	Hotels	Guesthouses	B&Bs
2008	56	53	51
2009	55	54	52
2010	60	56	54
2011	60	59	51
2012	58	56	49

## UK: BEDROOM OCCUPANCY BY TYPE OF ACCOMMODATION JULY 2008-2012



	Hotels	Guesthouses	B&Bs
2008	72	65	61
2009	70	66	60
2010	79	68	62
2011	78	69	62
2012	74	66	60



- ❖ Across the UK as a whole, both bed and room occupancy levels across all categories witnessed a decrease when compared to July 2011. The biggest drop in bedspace occupancy was found in Guesthouses (3 percentage points), whilst hotels witnessed a 4 percentage point drop in room occupancy. (Table 3).
- ❖ Across all size bandings, both room and bedspace occupancy had fallen during July 2012. The biggest decrease in both room and bedspace occupancy for the UK was in the 11-25 size band (4 percentage points for bed and 6 percentage points for room). The 26-50 size category saw the smallest decrease in bedspace occupancy with a fall of only 1 percentage point when compared with July 2011. (Tables 6 and 7).
- ❖ When compared with July 2011, occupancy levels in all locations fell in both room and bedspace occupancy. Countryside/village locations saw the biggest fall by 7 percentage points in room and 5 in bedspace occupancy. Small town locations fared slightly better with only a 2 percentage drop in bedspace occupancy and 1 in room. (Table 8).
- ❖ When looking at occupancy levels by tariff, only the smallest size band (£20-£29.99) remained static in both room and bedspace occupancy when compared to the previous year. Across all other categories room and bed occupancy had fallen. Size bands £40-£49.99 and £60+ saw the largest drops in bedspace occupancy falling by 4 percentage points respectively.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	60	61	58	80	79	75	962	1041	994
Northern Ireland	53	46	60	67	66	77	69	71	52
Scotland	62	63	60	76	77	75	247	239	219
Wales	55	50	49	71	69	65	104	89	73
<b>UK</b>	60	60	58	79	78	74	1382	1440	1338
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	57	60	58	69	70	68	287	265	239
Northern Ireland	37	28	45	45	42	60	19	16	18
Scotland	58	65	56	69	73	65	67	60	49
Wales	42	40	40	54	50	52	39	29	28
<b>UK</b>	56	59	56	68	69	66	412	370	334
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	54	53	50	63	65	62	433	419	380
Northern Ireland	37	29	30	43	39	41	58	89	90
Scotland	63	49	54	67	56	63	85	74	58
Wales	43	42	33	50	49	38	58	54	48
<b>UK</b>	54	51	49	62	62	60	634	636	576



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: July 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	63	63	57	56	56	52	76	75	68	78	80	74
Northern Ireland	53	43	53	45	38	49	63	58	71	59	58	67
Scotland	65	63	61	59	59	57	73	72	70	74	75	73
Wales	55	51	48	47	46	43	65	62	58	64	66	62
<b>UK</b>	<b>63</b>	<b>62</b>	<b>57</b>	<b>56</b>	<b>55</b>	<b>52</b>	<b>75</b>	<b>74</b>	<b>68</b>	<b>76</b>	<b>78</b>	<b>73</b>



**Table 5: Non-UK Percentages: July 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	10	13	12	14	18	15	14	15	15	16	17	17
Northern Ireland	32	32	37	38	34	39	40	51	53	42	53	36
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	8	9	10	12	11	10
<b>UK</b>	<b>10</b>	<b>13</b>	<b>13</b>	<b>15</b>	<b>18</b>	<b>16</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>16</b>	<b>17</b>	<b>17</b>

\*\* FIGURES NOT AVAILABLE



**Table 6: Occupancy Levels by Size: July 2010 - 2012**

<b>A: Percentage of Bedspace Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	47	50	47	249	56	55	52	336	57	57	53	134
Northern Ireland	28	20	23	75	45	44	43	24	43	33	40	26
Scotland	58	46	52	52	59	63	55	66	57	62	59	53
Wales	38	37	31	42	49	45	43	44	52	53	45	24
<b>UK</b>	48	48	46	418	56	55	52	470	56	57	53	237

**Table6: Occupancy Levels by Size: July 2010 - 2012**

<b>A (cont) : Percentage of Bedspace Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	61	60	59	76	60	61	55	43	61	60	55	775
Northern Ireland	51	37	48	12	54	43	58	16	57	53	69	7
Scotland	62	62	60	52	67	64	63	47	65	64	61	56
Wales	53	51	49	19	54	47	51	13	62	50	47	6
<b>UK</b>	60	59	58	159	60	60	56	119	61	60	56	844



**Table 7: Occupancy Levels by Size: July 2010 – 2012**

<b>B:Percentage of Bedroom Occupancy</b>												
	<b>1 - 3 Rooms</b>				<b>4 - 10 Rooms</b>				<b>11 - 25 Rooms</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	56	59	55	249	66	66	63	336	69	71	64	134
Northern Ireland	35	30	34	75	50	48	52	24	56	53	58	26
Scotland	64	53	60	52	69	72	64	66	67	71	69	53
Wales	45	46	37	42	60	55	53	44	65	68	58	24
<b>UK</b>	56	57	54	375	66	66	62	470	68	70	64	237

**Table 7: Occupancy Levels by Size: July 2010 - 2012**

<b>B (cont): Percentage of Bedroom Occupancy</b>												
	<b>26 - 50 Rooms</b>				<b>51 - 100 Rooms</b>				<b>&gt;100 Rooms</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	76	76	73	76	78	78	71	43	84	84	78	775
Northern Ireland	63	68	71	12	71	69	74	16	69	68	85	7
Scotland	76	76	73	52	83	79	79	47	83	84	81	56
Wales	68	67	64	19	72	71	73	13	81	71	66	6
<b>UK</b>	75	75	72	159	78	78	72	119	83	83	78	844



**Table 8: Occupancy Levels by Location: July 2012 - 2012**

<b>A: Percentage Bedspace Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	57	62	57	235	63	63	58	591	54	54	52	350	55	56	50	437
Northern Ireland	55	51	47	41	50	45	63	45	48	29	39	46	44	31	26	28
Scotland	62	65	59	46	65	62	60	120	58	55	52	73	58	60	59	87
Wales	58	56	52	36	53	43	42	16	48	44	46	24	47	46	41	73
<b>UK</b>	58	62	57	358	62	61	57	772	54	53	51	493	55	55	50	625

**Table 8: Occupancy Levels by Location: July 2012 - 2012**

<b>B:Percentage Bedroom Occupancy</b>																
	<b>Seaside</b>				<b>City/Large Town</b>				<b>Small Town</b>				<b>Countryside/Village</b>			
	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	70	70	69	235	84	82	76	591	71	74	73	350	66	69	60	437
Northern Ireland	66	70	65	41	63	65	79	45	54	42	49	46	52	40	40	28
Scotland	71	77	72	46	81	79	78	120	71	67	65	73	67	67	67	87
Wales	72	71	64	36	68	65	62	16	70	67	67	24	56	57	51	73
<b>UK</b>	70	71	69	358	82	80	75	772	71	72	71	493	65	67	60	625



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

**A: Percentage of Bedspace Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	**	**	**	**	37	37	37	4	52	47	44	164
Northern Ireland	**	**	**	**	35	23	27	32	39	36	34	42
Scotland	**	**	**	**	58	45	38	13	56	54	51	70
Wales	**	**	**	**	34	29	31	14	46	41	40	47
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>40</b>	<b>37</b>	<b>37</b>	<b>63</b>	<b>52</b>	<b>47</b>	<b>44</b>	<b>323</b>

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

**B: Percentage of Bedspace Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	58	59	55	186	56	60	57	95	60	60	55	1074
Northern Ireland	36	29	49	30	45	51	63	17	55	46	59	38
Scotland	59	63	61	33	55	61	58	36	65	64	62	174
Wales	45	53	43	24	50	51	49	15	58	50	48	49
<b>UK</b>	<b>57</b>	<b>59</b>	<b>55</b>	<b>273</b>	<b>55</b>	<b>59</b>	<b>57</b>	<b>163</b>	<b>60</b>	<b>60</b>	<b>56</b>	<b>1335</b>

\*\* FIGURES NOT AVAILABLE

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

**A: Percentage of Bedroom Occupancy**

	<b>&lt;£20.00</b>				<b>£20.00 - £29.99</b>				<b>£30.00 - £39.99</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	**	**	**	**	47	50	49	4	62	57	55	164
Northern Ireland	**	**	**	**	40	33	40	32	47	48	44	42
Scotland	**	**	**	**	64	52	51	13	75	68	65	70
Wales	**	**	**	**	40	35	48	14	56	53	50	47
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>49</b>	<b>49</b>	<b>49</b>	<b>63</b>	<b>63</b>	<b>58</b>	<b>56</b>	<b>323</b>

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

**B: Percentage of Bedroom Occupancy**

	<b>£40.00 - £49.99</b>				<b>£50.00 - £59.99</b>				<b>&gt;£60.00</b>			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	68	70	66	186	70	72	67	95	79	80	74	1074
Northern Ireland	49	54	62	30	46	55	77	17	68	66	77	38
Scotland	70	73	71	33	62	70	69	36	80	78	76	174
Wales	58	66	55	24	73	67	60	15	72	69	66	49
<b>UK</b>	<b>67</b>	<b>70</b>	<b>66</b>	<b>273</b>	<b>69</b>	<b>71</b>	<b>67</b>	<b>163</b>	<b>78</b>	<b>79</b>	<b>74</b>	<b>1335</b>

\*\* 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)

