



# UNITED KINGDOM OCCUPANCY SURVEY

**Serviced Accommodation Summary Report**  
**June 2012**

# UK OCCUPANCY SURVEY

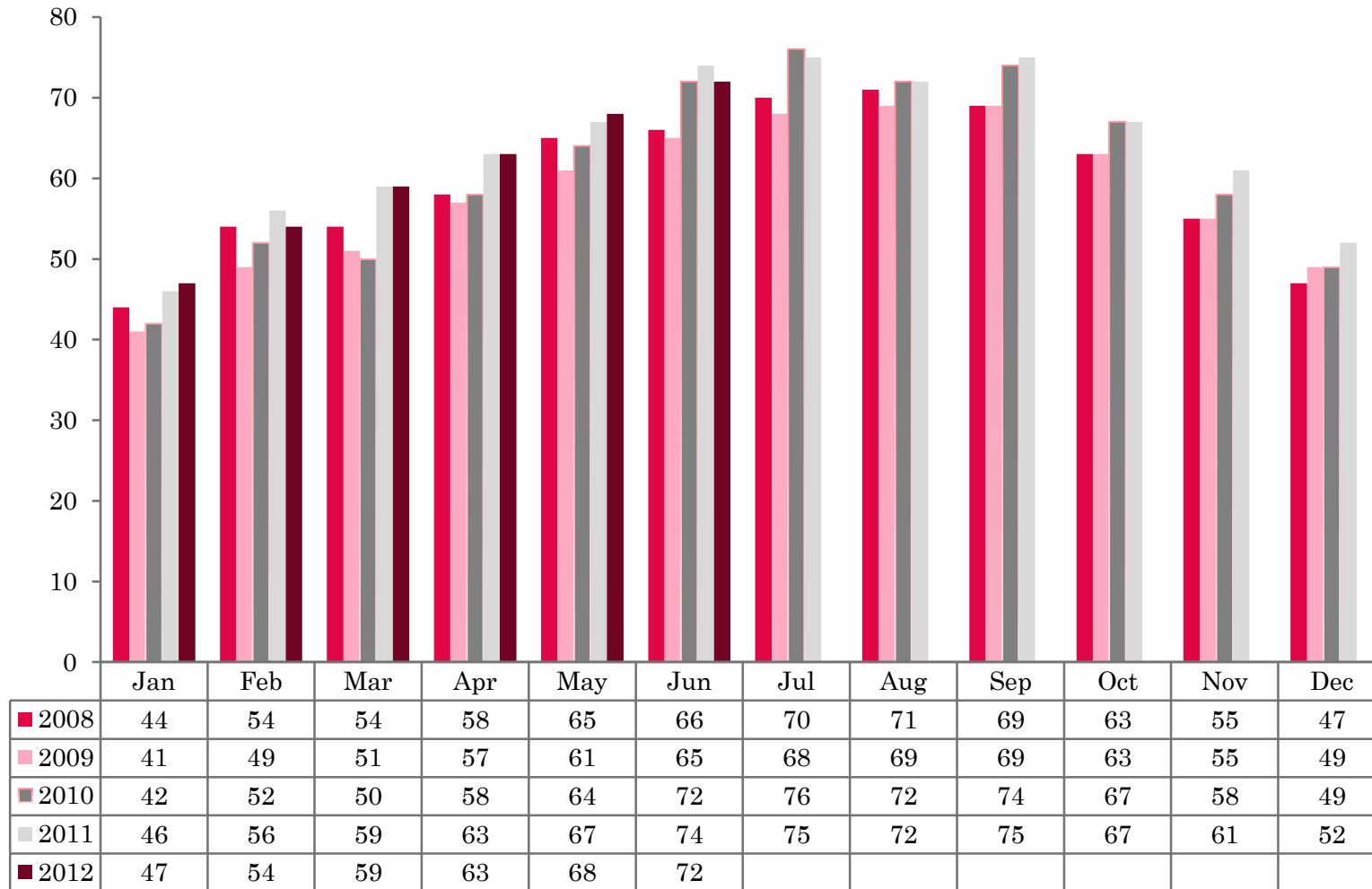
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution



# UK BEDSPACE OCCUPANCY 2008 - 2012



# UK BEDROOM OCCUPANCY 2008 - 2012

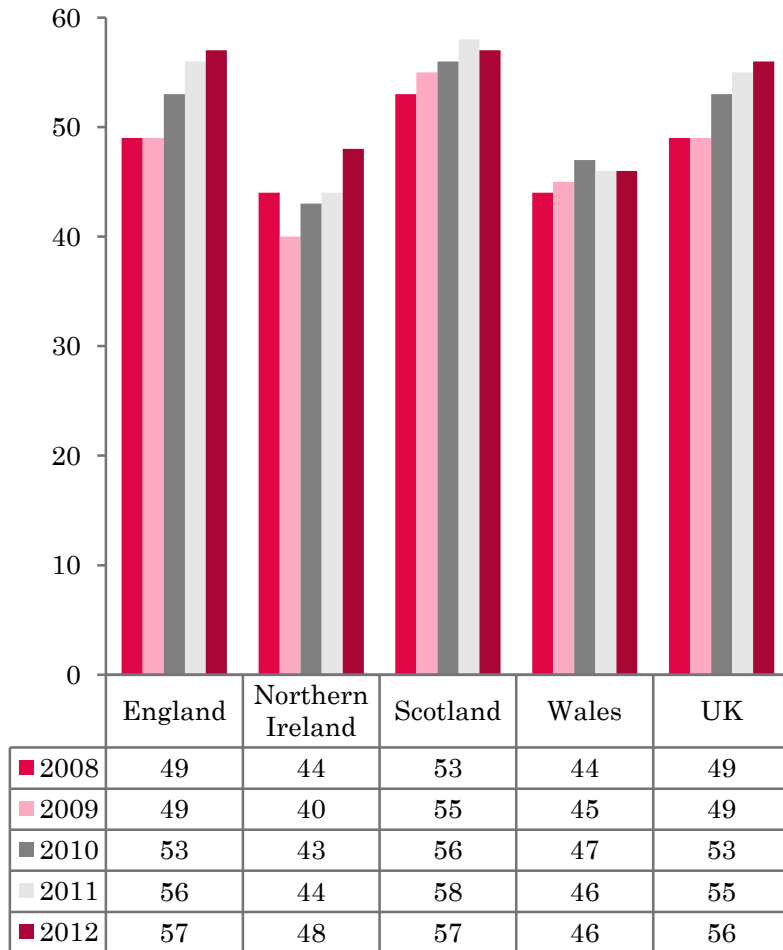


- ❖ 2,265 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

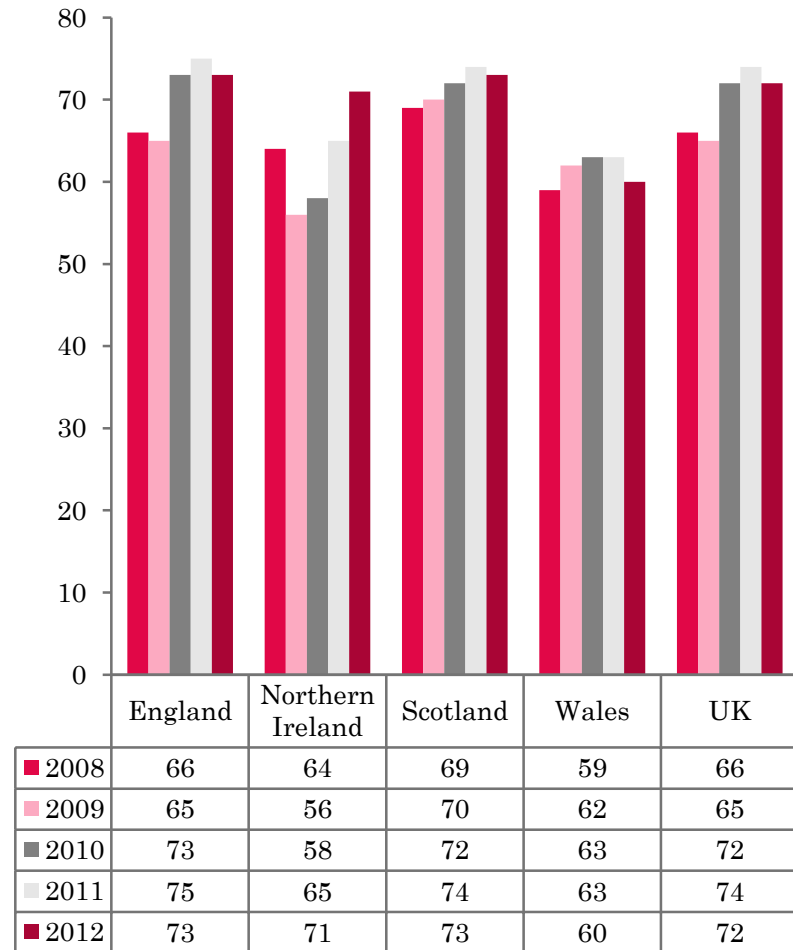
- ❖ UK bedspace occupancy in June (56%) increased by a single percentage point (at its highest level since 2008). UK bedroom occupancy (72%) fell by two percentage points when compared with 2011.



## NATIONAL BEDSPACE OCCUPANCY JUNE 2008-2012



## NATIONAL ROOM OCCUPANCY JUNE 2008-2012



- ❖ Bedspace occupancy varied from 57% in England and Scotland to 46% in Wales. A similar pattern was seen in room occupancy with both England and Scotland achieving 73% occupancy to 60% in Wales.
- ❖ Bedspace occupancy in the UK for June was at its highest level since 2008, up 7 percentage points in that period. UK bedroom occupancy had fallen by 2 percentage points when compared with June 2011.
- ❖ As with the UK figures, occupancy levels in England had increased by 1 percentage point, 8 percentage points above the 2008 figure for bed occupancy. However, room occupancy in this month had fallen by 2 percentage points when compared with the same month in 2011.
- ❖ When compared with June 2011, occupancy levels in Northern Ireland had increased by 6 percentage points for room, and 4 percentage points for bedspace occupancy.
- ❖ Wales had remained on a par with the previous year for bedspace occupancy, but down 3 percentage points for room occupancy levels. Scotland had witnessed a slight decrease in both bed and room occupancy levels (1 percentage point respectively).



**Table 1: Occupancy Levels: June 2010 – 2012**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	53	56	57	73	75	73	1717	1705	1610
Northern Ireland	43	44	48	58	65	71	157	174	173
Scotland	56	58	57	72	74	73	405	376	339
Wales	47	46	46	63	63	60	206	175	143
<b>UK</b>	<b>53</b>	<b>55</b>	<b>56</b>	<b>72</b>	<b>74</b>	<b>72</b>	<b>2485</b>	<b>2430</b>	<b>2265</b>

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

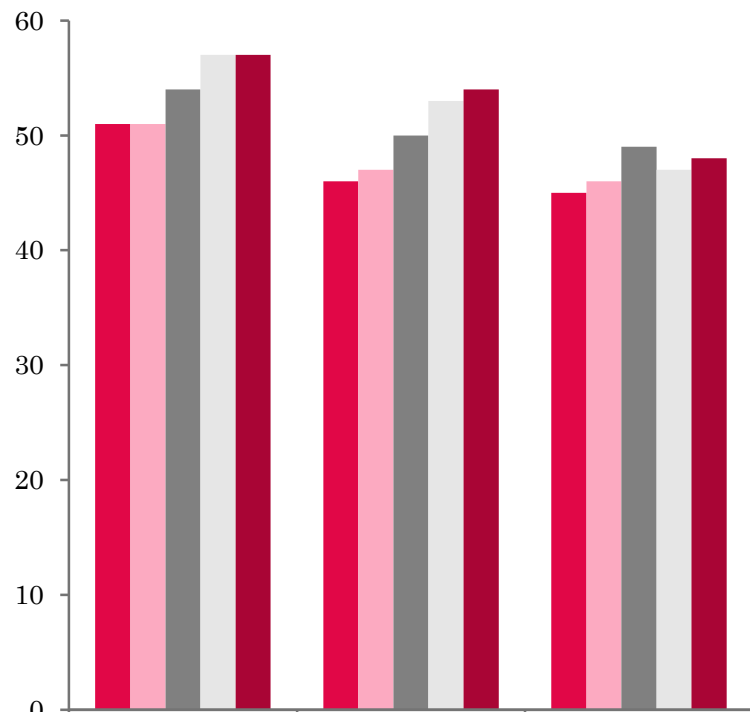
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	45	46	46	7	10	8	11	15	12	14	18	15	1717	1705	1610
Northern Ireland	25	20	25	18	24	24	35	39	36	42	55	49	157	174	173
Scotland	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Wales	40	41	41	3	4	2	***	***	***	8	8	6	206	175	143
<b>UK</b>	<b>44</b>	<b>45</b>	<b>45</b>	<b>7</b>	<b>10</b>	<b>8</b>	<b>12</b>	<b>16</b>	<b>13</b>	<b>14</b>	<b>18</b>	<b>15</b>	<b>2485</b>	<b>2430</b>	<b>2265</b>

\*\* FIGURES NOT AVAILABLE



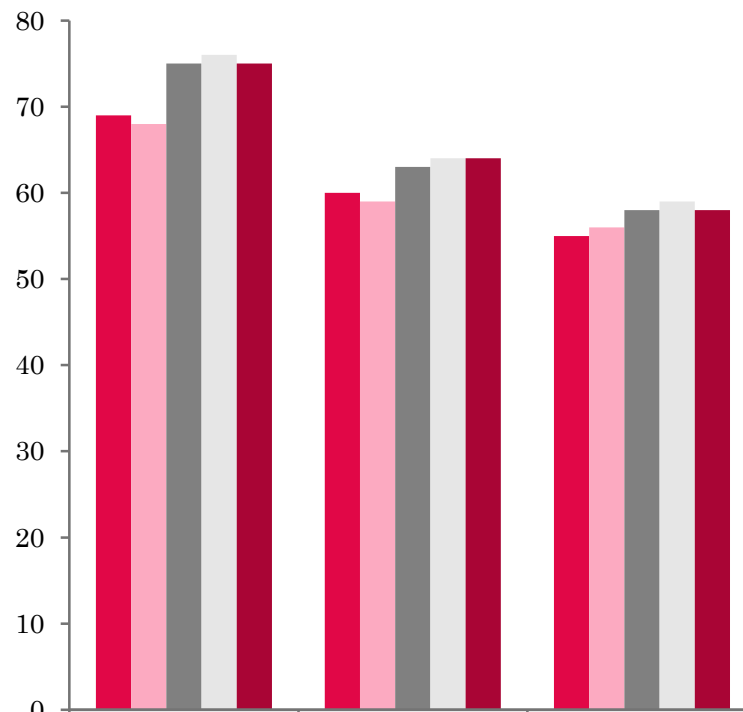


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION JUNE 2008-2012

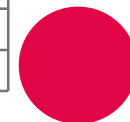


	Hotels	Guesthouses	B&Bs
2008	51	46	45
2009	51	47	46
2010	54	50	49
2011	57	53	47
2012	57	54	48

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



	Hotels	Guesthouses	B&Bs
2008	69	60	55
2009	68	59	56
2010	75	63	58
2011	76	64	59
2012	75	64	58



- ❖ Across the UK as a whole, bedspace occupancy levels in hotels remained as in 2011 while both guesthouses and bed and breakfast establishments saw an increase of 1 percentage point respectively. Room occupancy in both hotels and bed and breakfast establishments saw a slight fall of 1 percentage point each with guesthouses remaining at the same level as June 2011 (Table 3).
- ❖ When compared with June 2011, only those establishments with 26-50 bedrooms saw a rise in occupancy for both measures. Both bedspace and room occupancy rates dropped for establishments with 1-3 rooms, whilst bedspace occupancy rose slightly in 11-25 and 51-100 rooms. Bed and room occupancy in establishments with 4-10 and 100+ rooms remained the same, whilst occupancy levels in all other size bands saw decreases (Tables 6 and 7).
- ❖ When compared with June 2011, occupancy levels rose in small town locations, (by 2 percentage points in bedspace and 1 percentage point in room occupancy. The countryside/village location saw a similar rise in bed occupancy as the small town location but room occupancy fell by 1 percentage point compared with the previous year. City/large town location witnessed a fall in both room and bedspace occupancy (4 and 1 percentage points respectively). (Table 8).
- ❖ When looking at occupancy levels by tariff, only the largest size band (£60+) had seen an increase in bedspace occupancy and the £30.00-£39.99 in room occupancy (by 1 and 2 percentage points each). Both room and bedspace occupancy levels had fallen in 2 of the tariff bands (£40.00-£49.99 and £50.00-£59.99) while the £20.00-£29.99 band had remained the same for bedspace occupancy when compared with June 2011.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	54	57	58	76	77	75	977	1033	994
Northern Ireland	48	48	52	66	70	78	73	67	59
Scotland	57	59	59	75	77	76	255	245	225
Wales	51	48	49	69	68	65	110	86	70
<b>UK</b>	<b>54</b>	<b>57</b>	<b>57</b>	<b>75</b>	<b>76</b>	<b>75</b>	<b>1415</b>	<b>1431</b>	<b>1348</b>
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	51	54	55	65	65	65	296	264	239
Northern Ireland	24	26	43	33	34	53	17	18	23
Scotland	50	60	57	63	71	69	66	58	49
Wales	42	40	36	53	75	45	39	31	30
<b>UK</b>	<b>50</b>	<b>53</b>	<b>54</b>	<b>63</b>	<b>64</b>	<b>64</b>	<b>418</b>	<b>371</b>	<b>341</b>
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	49	48	49	59	61	59	444	408	377
Northern Ireland	28	23	29	37	32	41	67	89	91
Scotland	54	51	48	61	60	59	84	73	65
Wales	38	39	41	47	46	45	57	58	43
<b>UK</b>	<b>49</b>	<b>47</b>	<b>48</b>	<b>58</b>	<b>59</b>	<b>58</b>	<b>652</b>	<b>628</b>	<b>576</b>



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: June 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	55	58	59	52	53	53	68	71	70	77	78	74
Northern Ireland	47	45	53	38	36	42	60	63	71	57	62	69
Scotland	59	61	60	54	56	55	69	72	71	73	76	74
Wales	52	50	49	44	44	42	63	62	60	63	63	60
<b>UK</b>	<b>55</b>	<b>58</b>	<b>58</b>	<b>52</b>	<b>53</b>	<b>52</b>	<b>68</b>	<b>70</b>	<b>70</b>	<b>75</b>	<b>77</b>	<b>73</b>



**Table 5: Non-UK Percentages: June 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	13	11	13	17	15	13	18	14	15	20	16
Northern Ireland	37	40	37	39	48	43	43	63	53	46	67	58
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	7	7	5	8	9	6
<b>UK</b>	<b>10</b>	<b>14</b>	<b>12</b>	<b>14</b>	<b>18</b>	<b>16</b>	<b>13</b>	<b>18</b>	<b>14</b>	<b>15</b>	<b>20</b>	<b>16</b>

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: June 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	43	46	45	254	50	49	49	341	51	51	52	128
Northern Ireland	21	18	21	80	31	34	42	26	37	30	45	26
Scotland	51	48	46	57	52	60	56	70	49	57	59	55
Wales	32	32	26	37	46	44	45	45	48	48	46	23
<b>UK</b>	43	45	43	428	50	50	50	482	50	51	52	232

**Table6: Occupancy Levels by Size: June 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	58	56	60	77	56	61	62	44	52	56	57	766
Northern Ireland	40	47	40	15	47	36	46	19	56	57	61	7
Scotland	58	58	59	55	61	62	64	47	60	60	59	55
Wales	50	48	55	19	53	48	52	13	62	49	44	6
<b>UK</b>	57	56	59	166	56	60	61	123	54	56	56	834

**Table 7: Occupancy Levels by Size: June 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	52	55	52	254	61	61	60	341	66	66	64	128
Northern Ireland	28	26	32	80	40	39	46	26	54	50	62	26
Scotland	59	57	57	57	64	71	68	70	63	70	70	55
Wales	40	40	32	37	58	55	55	45	65	65	59	23
<b>UK</b>	52	54	51	375	61	62	61	482	65	66	64	232

**Table 7: Occupancy Levels by Size: June 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	73	74	74	77	78	78	77	44	77	82	78	766
Northern Ireland	56	62	66	15	64	67	76	19	76	78	86	7
Scotland	74	74	75	55	81	81	81	47	83	84	81	55
Wales	66	65	70	19	75	74	69	13	79	67	65	6
<b>UK</b>	72	73	74	166	78	78	77	123	78	81	78	834



**Table 8: Occupancy Levels by Location: June 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	53	57	56	235	55	60	59	593	51	49	51	345	52	53	55	437
Northern Ireland	45	44	46	42	46	50	54	49	35	27	35	49	35	24	29	33
Scotland	58	65	58	45	58	59	60	121	51	51	50	71	53	56	56	102
Wales	57	53	55	36	48	42	38	13	45	42	46	23	43	45	44	71
<b>UK</b>	54	58	56	358	55	59	58	776	50	48	50	488	51	52	54	643

**Table 8: Occupancy Levels by Location: June 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	66	67	68	235	79	81	77	593	69	68	70	345	64	68	67	437
Northern Ireland	61	59	64	42	64	73	81	49	52	42	49	49	45	40	39	33
Scotland	70	77	73	45	78	81	80	121	67	66	64	71	64	66	68	102
Wales	72	69	68	36	69	63	56	13	67	64	67	23	54	58	53	71
<b>UK</b>	67	68	69	358	78	80	76	776	68	67	68	488	63	67	66	643



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	**	**	**	**	35	29	31	46	45	39	42	174
Northern Ireland	**	**	**	**	32	21	29	32	22	22	32	47
Scotland	**	**	**	**	49	45	38	26	48	52	49	67
Wales	**	**	**	**	26	23	13	13	43	41	42	45
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>36</b>	<b>31</b>	<b>31</b>	<b>117</b>	<b>45</b>	<b>41</b>	<b>43</b>	<b>333</b>

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	52	57	56	187	53	56	55	92	55	57	58	1069
Northern Ireland	27	38	39	34	40	53	36	16	50	48	54	44
Scotland	55	60	63	34	56	61	58	39	57	61	61	173
Wales	43	50	46	20	51	48	56	12	53	49	48	53
<b>UK</b>	<b>51</b>	<b>57</b>	<b>56</b>	<b>275</b>	<b>53</b>	<b>56</b>	<b>55</b>	<b>159</b>	<b>55</b>	<b>57</b>	<b>58</b>	<b>1339</b>

\*\* FIGURES NOT AVAILABLE

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	**	**	**	**	44	40	43	46	55	51	52	174
Northern Ireland	**	**	**	**	37	27	40	32	32	30	40	47
Scotland	**	**	**	**	57	55	52	26	68	64	63	67
Wales	**	**	**	**	35	31	17	13	55	53	54	45
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>45</b>	<b>41</b>	<b>42</b>	<b>117</b>	<b>56</b>	<b>52</b>	<b>54</b>	<b>333</b>

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) June 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	63	67	66	187	66	68	66	92	76	78	75	1069
Northern Ireland	43	55	56	34	51	68	58	16	68	71	80	44
Scotland	68	74	75	34	65	75	72	39	75	79	78	173
Wales	58	65	60	20	66	69	66	12	72	68	65	53
<b>UK</b>	<b>63</b>	<b>68</b>	<b>67</b>	<b>275</b>	<b>66</b>	<b>69</b>	<b>67</b>	<b>159</b>	<b>76</b>	<b>77</b>	<b>75</b>	<b>1339</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)

