



# UNITED KINGDOM OCCUPANCY SURVEY

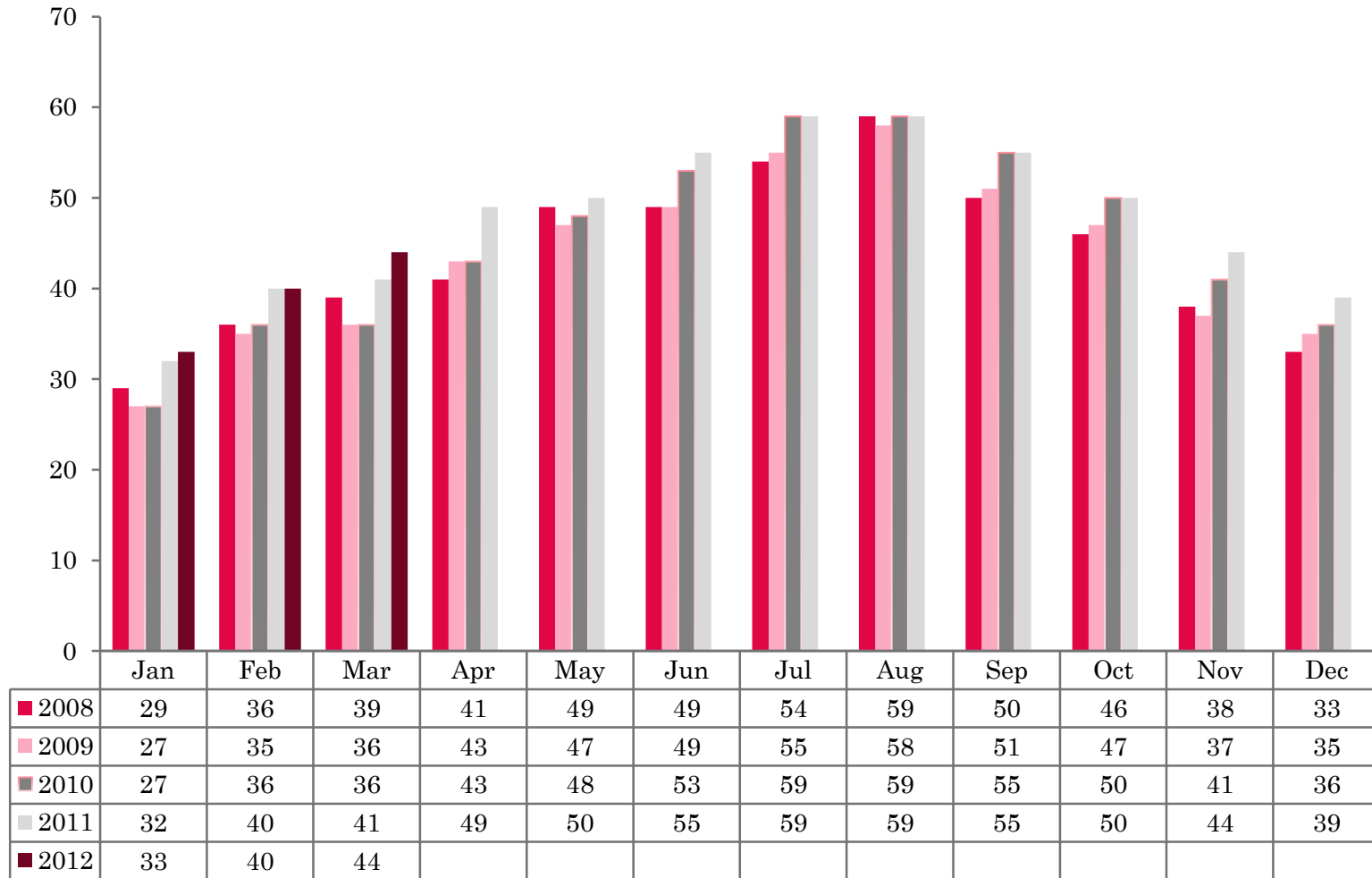
Serviced Accommodation Summary Report  
March 2012

# UK OCCUPANCY SURVEY

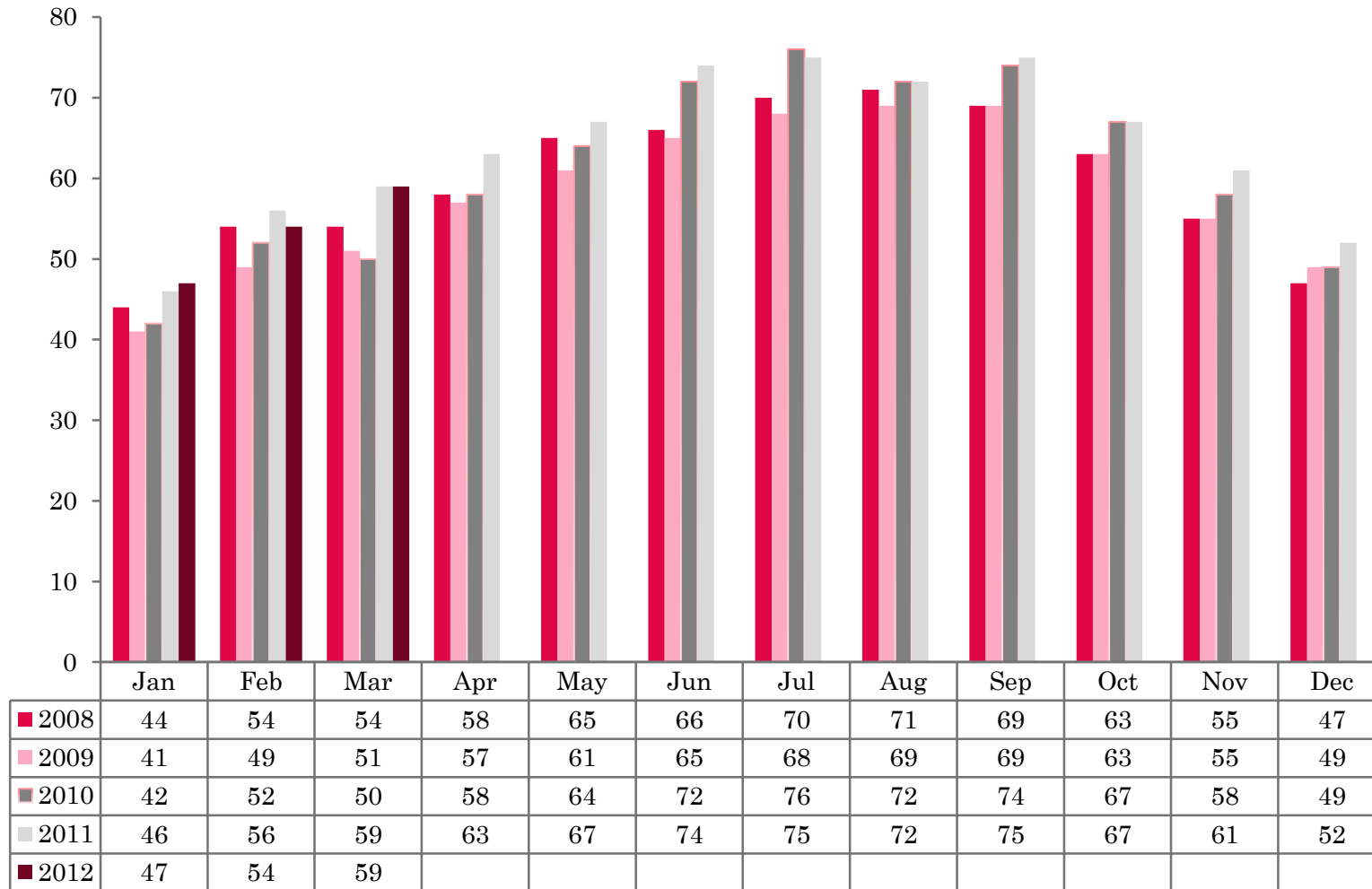
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution



# UK BEDSPACE OCCUPANCY 2008 - 2012



# UK BEDROOM OCCUPANCY 2008 - 2012

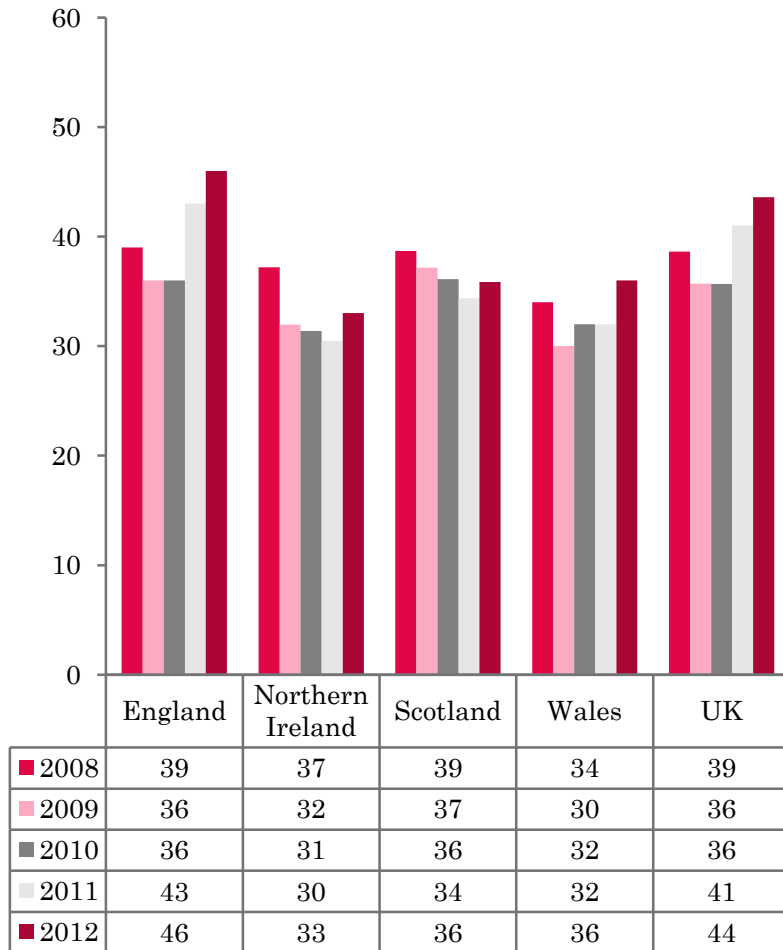


- ❖ 2251 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

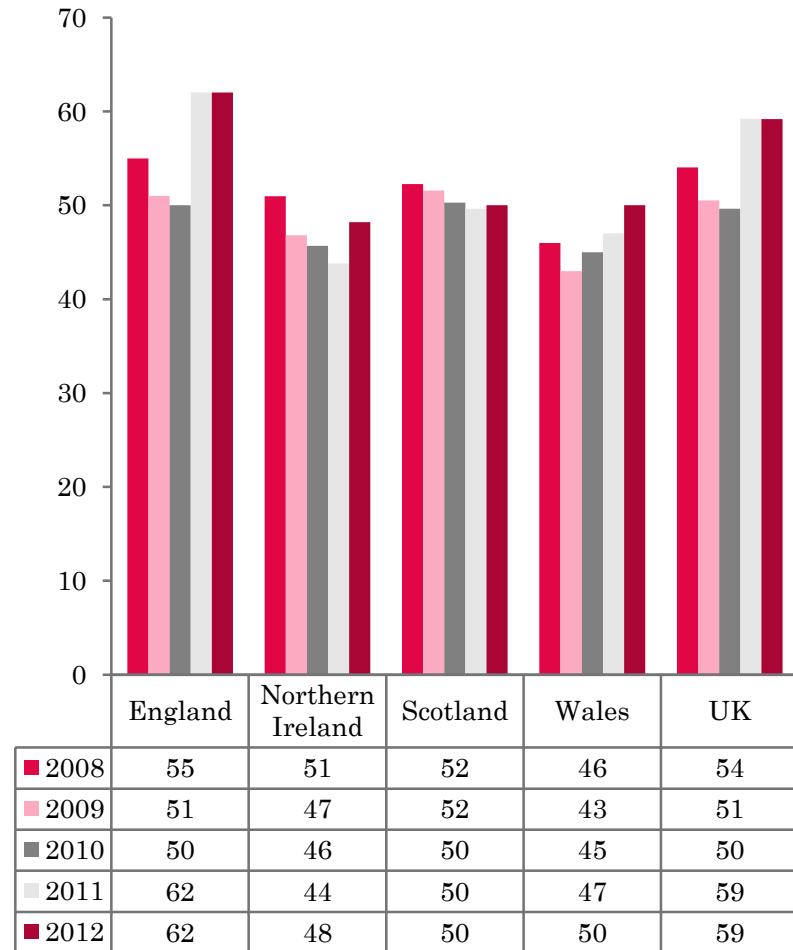
- ❖ UK bedspace occupancy (44%) had increased by 3 percentage points while room occupancy (59%) had remained at its 2011 figure.



## NATIONAL BEDSPACE OCCUPANCY MARCH 2008-2012



## NATIONAL ROOM OCCUPANCY MARCH 2008-2012



- ❖ Bedspace occupancy varied from 46% in England to 33% in Northern Ireland while room occupancy varied from 62% in England to 48% in Northern Ireland.
- ❖ When compared with March 2011, occupancy levels in Northern Ireland and Wales had increased (by 4 and 3 percentage points respectively for room occupancy). In England and Scotland bedspace occupancy had increased (by 3 and 2 percentage points) while room occupancy remained the same as in March 2011.
- ❖ Occupancy levels in England and Wales followed a similar pattern to the UK in that they dipped in March 2009-10 and recovered again in March 2011, rising again this year to their highest level in the last 5 years for the month. Occupancy levels for March in Northern Ireland and Scotland had also fallen since 2009, but have not yet recovered to 2008 levels.
- ❖ Bedspace occupancy by non-UK residents remained at its March 2011 level in England and Wales but Northern Ireland 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: March 2010 – 2012**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	36	43	46	50	62	62	1107	1641	1613
Northern Ireland	31	30	33	46	44	48	145	203	186
Scotland	36	34	36	50	50	50	362	357	311
Wales	32	32	36	45	47	50	188	167	141
<b>UK</b>	<b>36</b>	<b>41</b>	<b>44</b>	<b>50</b>	<b>59</b>	<b>59</b>	<b>1802</b>	<b>2368</b>	<b>2251</b>

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

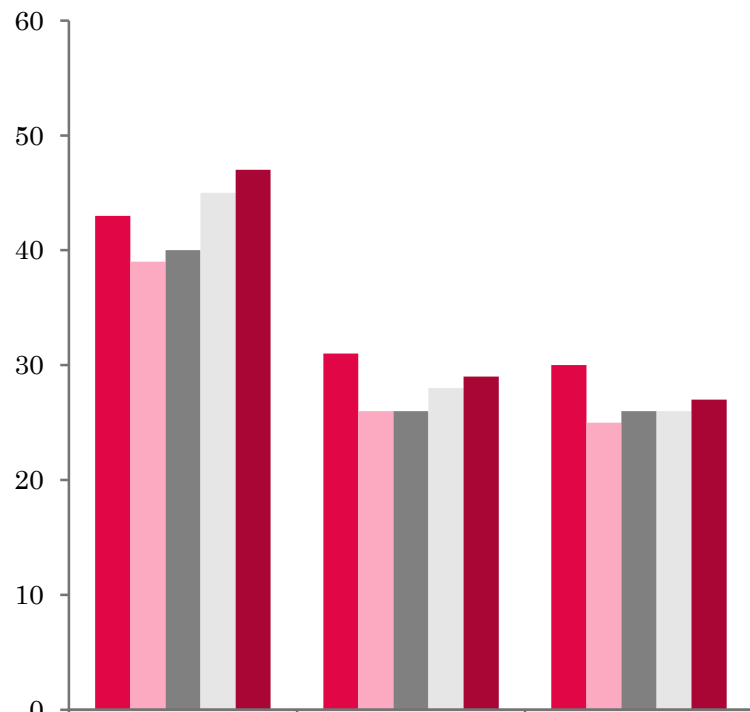
	UK Bedspace Occupancy %			Non-UK Bedspace Occupancy %			Percentage of non-UK guests %			Percentage of non-UK bednights %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	30	30	32	4	5	5	9	11	9	11	15	13	1107	1641	1613
Northern Ireland	20	19	22	11	12	11	28	30	30	35	38	33	145	203	186
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	362	357	311
Wales	26	27	33	1	2	2	**	**	**	5	5	5	188	167	141
<b>UK</b>	<b>30</b>	<b>30</b>	<b>32</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>9</b>	<b>11</b>	<b>10</b>	<b>11</b>	<b>15</b>	<b>13</b>	<b>1802</b>	<b>2368</b>	<b>2251</b>

\*\* FIGURES NOT AVAILABLE



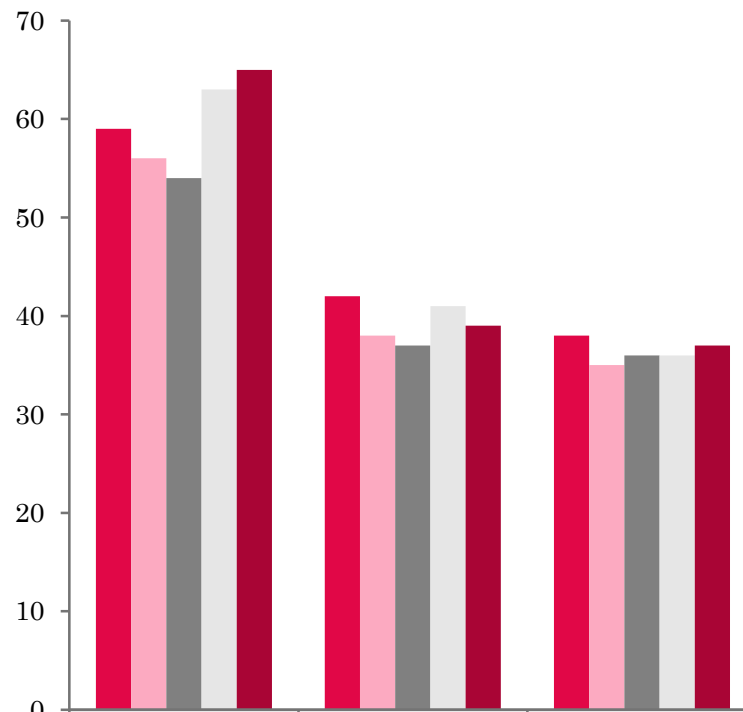


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MARCH 2008-2012



	Hotels	Guesthouses	B&Bs
2008	43	31	30
2009	39	26	25
2010	40	26	26
2011	45	28	26
2012	47	29	27

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



	Hotels	Guesthouses	B&Bs
2008	59	42	38
2009	56	38	35
2010	54	37	36
2011	63	41	36
2012	65	39	37



- ❖ Across the UK as a whole, occupancy levels had increased in hotels and bed and breakfast establishments (by 2 percentage points for both room and bedspace occupancy in hotels and by 1 percentage point for each in bed and breakfast establishments). Guest houses saw bedspace occupancy rising (by 1 percentage point) but room occupancy falling by 2 percentage points (Table 3).
- ❖ For the UK as a whole, bedspace occupancy increased across each of the size categories (by between 1 and 5 percentage points), whilst for bedroom occupancy there was a slight decline in the 1-3 and 4-10 rooms, with all other size bands reporting the same or increased levels of occupancy since 2011. (Tables 6 and 7).
- ❖ When compared with March 2011, occupancy levels rose across the UK (by between 2 and 4 percentage points) in seaside and small town locations. Both city/large town and country/village locations also saw a 1 percentage point increase in bedspace occupancy with room occupancy remaining at its 2011 level in the former and falling by 1 percentage point in the latter) (Table 8).
- ❖ Occupancy levels in the UK had increased (by between 1 and 6 percentage points) in 4 of the 5 tariff bands. In the remaining tariff band (£30.00-£39.99) bedspace occupancy rose (by 2 percentage points) with room occupancy remaining as in 2011 (Tables 9 and 10 and note 5a, Slide 19).



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	40	46	49	54	65	67	343	983	1003
Northern Ireland	36	38	39	53	53	57	67	71	66
Scotland	41	40	43	57	58	59	234	244	219
Wales	38	38	42	54	55	58	102	93	77
<b>UK</b>	<b>40</b>	<b>45</b>	<b>47</b>	<b>54</b>	<b>63</b>	<b>65</b>	<b>746</b>	<b>1391</b>	<b>1365</b>
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	28	30	31	40	44	42	296	262	238
Northern Ireland	14	16	25	19	23	34	18	23	20
Scotland	21	24	23	29	33	30	62	55	43
Wales	20	16	17	28	21	25	36	27	30
<b>UK</b>	<b>26</b>	<b>28</b>	<b>29</b>	<b>37</b>	<b>41</b>	<b>39</b>	<b>412</b>	<b>367</b>	<b>331</b>
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	28	29	29	38	40	41	466	396	372
Northern Ireland	17	11	11	25	17	19	59	109	100
Scotland	18	16	18	26	23	27	66	58	49
Wales	21	14	22	27	19	25	50	47	34
<b>UK</b>	<b>26</b>	<b>26</b>	<b>27</b>	<b>36</b>	<b>36</b>	<b>37</b>	<b>641</b>	<b>610</b>	<b>555</b>



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: March 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	45	48	41	41	43	51	56	58	48	64	66
Northern Ireland	38	34	36	27	24	27	47	43	50	45	41	46
Scotland	40	38	39	34	32	33	48	47	48	51	51	52
Wales	36	37	42	28	28	31	44	47	52	45	46	48
<b>UK</b>	<b>34</b>	<b>43</b>	<b>46</b>	<b>39</b>	<b>39</b>	<b>40</b>	<b>50</b>	<b>54</b>	<b>56</b>	<b>48</b>	<b>61</b>	<b>62</b>



**Table 5: Non-UK Percentages: March 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	9	8	8	13	11	12	13	12	11	16	14
Northern Ireland	25	32	32	31	34	34	34	40	33	36	43	38
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	6	5	6	8	4
<b>UK</b>	<b>10</b>	<b>10</b>	<b>9</b>	<b>9</b>	<b>13</b>	<b>12</b>	<b>12</b>	<b>13</b>	<b>12</b>	<b>11</b>	<b>16</b>	<b>14</b>

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: March 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	22	23	24	252	29	27	29	340	35	36	38	126
Northern Ireland	12	5	8	80	15	17	19	28	26	22	28	29
Scotland	15	14	15	42	23	27	25	64	29	29	36	50
Wales	17	15	13	32	24	23	27	46	31	32	40	22
<b>UK</b>	<b>21</b>	<b>21</b>	<b>22</b>	<b>406</b>	<b>28</b>	<b>27</b>	<b>28</b>	<b>478</b>	<b>34</b>	<b>35</b>	<b>38</b>	<b>227</b>

**Table62 6: Occupancy Levels by Size: March 2010 - 2012**

<b>65B: 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	42	41	46	83	48	44	49	44	36	49	50	768
Northern Ireland	27	30	23	18	36	34	39	21	44	46	47	10
Scotland	41	40	42	56	52	48	47	47	49	46	47	52
Wales	37	36	44	20	42	41	42	14	53	44	45	7
<b>UK</b>	<b>41</b>	<b>40</b>	<b>45</b>	<b>177</b>	<b>48</b>	<b>44</b>	<b>48</b>	<b>126</b>	<b>39</b>	<b>48</b>	<b>49</b>	<b>837</b>



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

<b>A: 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	31	31	31	252	38	39	39	340	48	49	52	126
Northern Ireland	19	11	13	80	20	23	22	28	39	36	39	29
Scotland	23	20	21	42	33	37	34	64	39	44	46	50
Wales	21	19	17	32	33	28	32	46	42	43	52	22
<b>UK</b>	<b>29</b>	<b>29</b>	<b>28</b>	<b>375</b>	<b>37</b>	<b>38</b>	<b>37</b>	<b>478</b>	<b>46</b>	<b>48</b>	<b>51</b>	<b>227</b>

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

<b>B: 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	59	58	63	83	65	65	67	44	47	72	72	768
Northern Ireland	41	43	51	18	53	50	56	21	62	61	65	10
Scotland	54	55	56	56	71	64	64	47	68	68	68	52
Wales	53	50	60	20	60	66	62	14	70	66	64	7
<b>UK</b>	<b>58</b>	<b>57</b>	<b>62</b>	<b>177</b>	<b>65</b>	<b>65</b>	<b>66</b>	<b>126</b>	<b>51</b>	<b>71</b>	<b>71</b>	<b>837</b>



**Table 8: Occupancy Levels by Location: March 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	30	34	36	229	44	51	53	595	37	38	40	357	31	34	35	432
Northern Ireland	28	25	29	43	34	37	39	57	31	20	22	52	25	12	14	34
Scotland	32	33	35	40	44	44	43	117	30	27	29	69	30	24	29	85
Wales	34	37	41	35	44	40	41	17	28	26	35	20	28	27	29	69
<b>UK</b>	<b>30</b>	<b>34</b>	<b>36</b>	<b>347</b>	<b>44</b>	<b>49</b>	<b>50</b>	<b>786</b>	<b>35</b>	<b>36</b>	<b>38</b>	<b>498</b>	<b>31</b>	<b>32</b>	<b>33</b>	<b>620</b>

**Table 8: Occupancy Levels by Location: March 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	43	44	48	229	64	71	71	595	39	58	60	357	44	51	49	432
Northern Ireland	36	33	38	43	52	54	58	57	41	28	32	52	35	17	27	34
Scotland	42	45	44	40	61	65	63	117	43	40	41	69	40	34	39	85
Wales	44	50	53	35	63	63	62	17	44	43	52	20	38	35	36	69
<b>UK</b>	<b>43</b>	<b>44</b>	<b>48</b>	<b>347</b>	<b>63</b>	<b>69</b>	<b>69</b>	<b>786</b>	<b>40</b>	<b>54</b>	<b>56</b>	<b>498</b>	<b>43</b>	<b>47</b>	<b>46</b>	<b>620</b>



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	**	**	**	**	16	13	14	51	21	23	24	174
Northern Ireland	**	**	**	**	15	10	13	35	11	11	14	52
Scotland	**	**	**	**	27	18	22	26	29	23	22	60
Wales	**	**	**	**	17	16	11	12	24	16	26	42
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>17</b>	<b>14</b>	<b>15</b>	<b>124</b>	<b>22</b>	<b>22</b>	<b>24</b>	<b>328</b>

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	31	27	33	190	39	34	40	92	39	45	48	1064
Northern Ireland	23	22	30	34	27	29	20	16	38	39	40	49
Scotland	33	27	30	30	34	39	39	37	39	41	44	158
Wales	25	34	31	18	39	40	41	18	39	37	41	51
<b>UK</b>	<b>31</b>	<b>27</b>	<b>32</b>	<b>272</b>	<b>38</b>	<b>35</b>	<b>40</b>	<b>163</b>	<b>39</b>	<b>44</b>	<b>47</b>	<b>1322</b>

\*\* FIGURES NOT AVAILABLE

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

**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	**	**	**	**	24	22	27	51	30	33	33	174
Northern Ireland	**	**	**	**	22	14	18	35	16	17	19	52
Scotland	**	**	**	**	41	25	30	26	42	38	33	60
Wales	**	**	**	**	24	23	17	12	31	22	31	42
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>26</b>	<b>22</b>	<b>27</b>	<b>124</b>	<b>31</b>	<b>33</b>	<b>33</b>	<b>328</b>

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) March 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	41	35	42	190	52	53	54	92	50	65	67	1064
Northern Ireland	38	38	42	34	37	37	44	16	55	54	59	49
Scotland	44	37	40	30	46	53	53	37	54	60	60	158
Wales	39	45	43	18	49	49	55	18	57	56	58	51
<b>UK</b>	<b>41</b>	<b>36</b>	<b>42</b>	<b>272</b>	<b>51</b>	<b>52</b>	<b>54</b>	<b>163</b>	<b>51</b>	<b>64</b>	<b>65</b>	<b>1322</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 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)

