



UNITED KINGDOM OCCUPANCY SURVEY

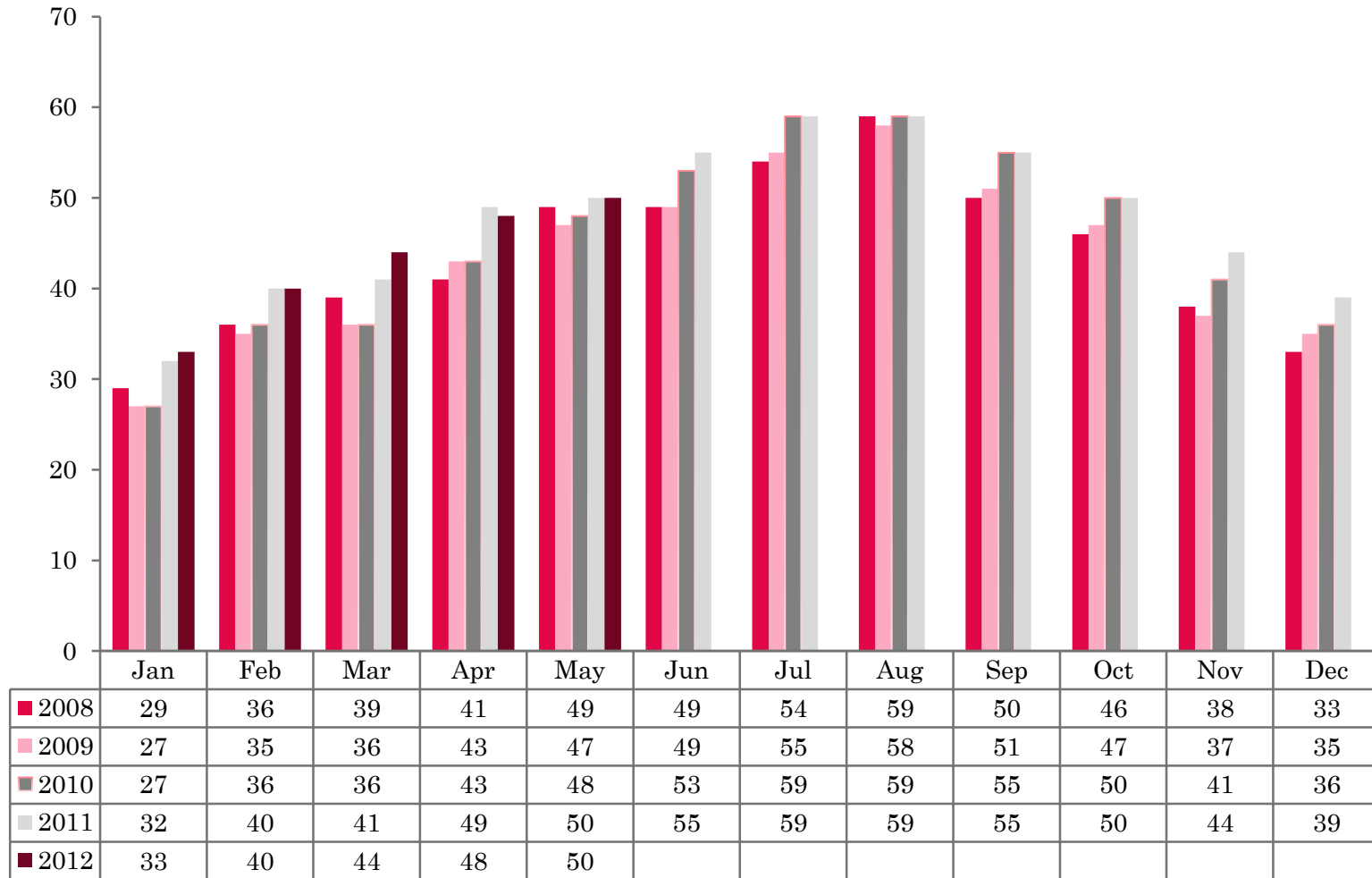
Serviced Accommodation Summary Report
May 2012

UK OCCUPANCY SURVEY

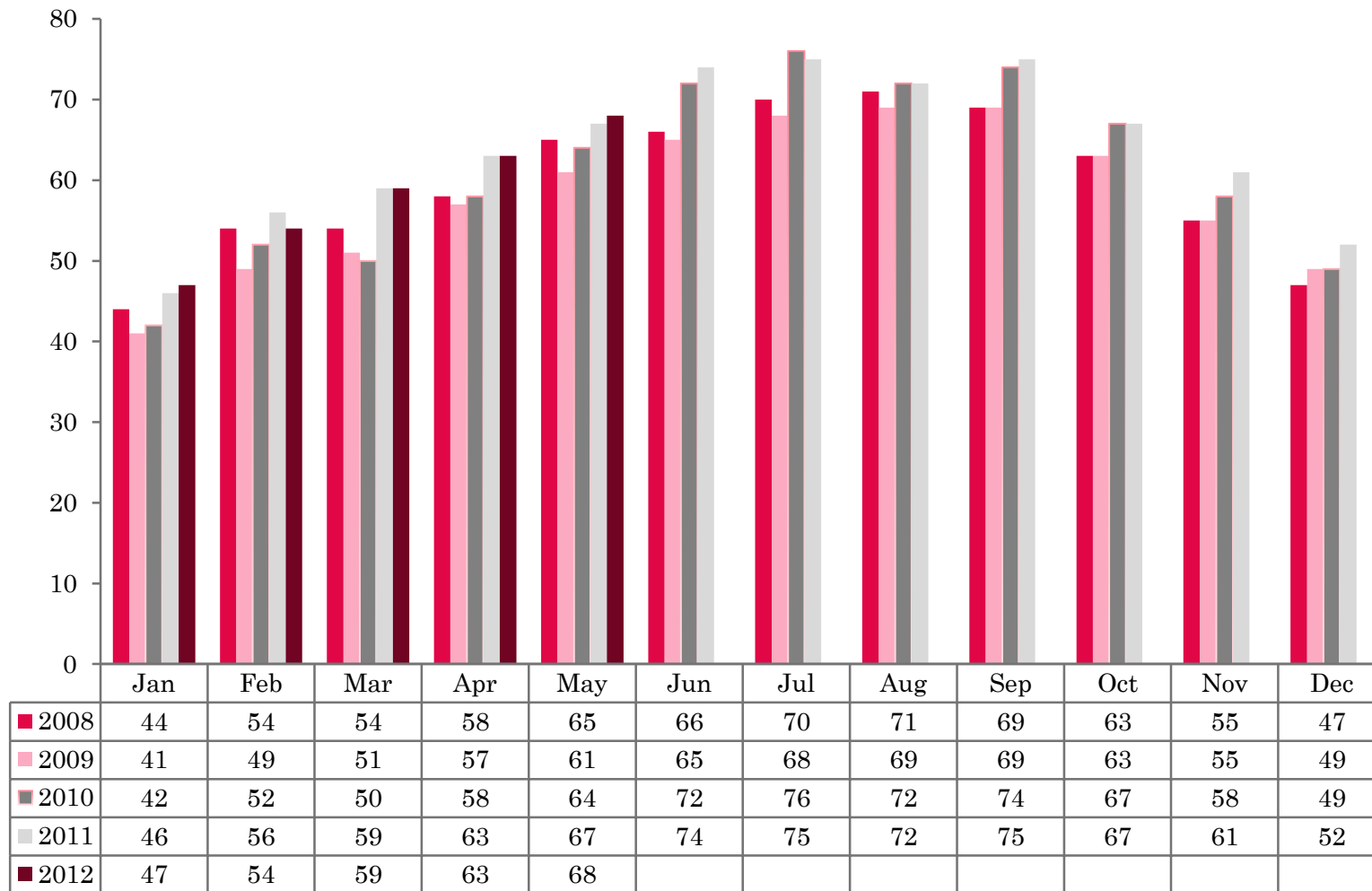
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution



UK BEDSPACE OCCUPANCY 2008 - 2012



UK BEDROOM OCCUPANCY 2008 - 2012

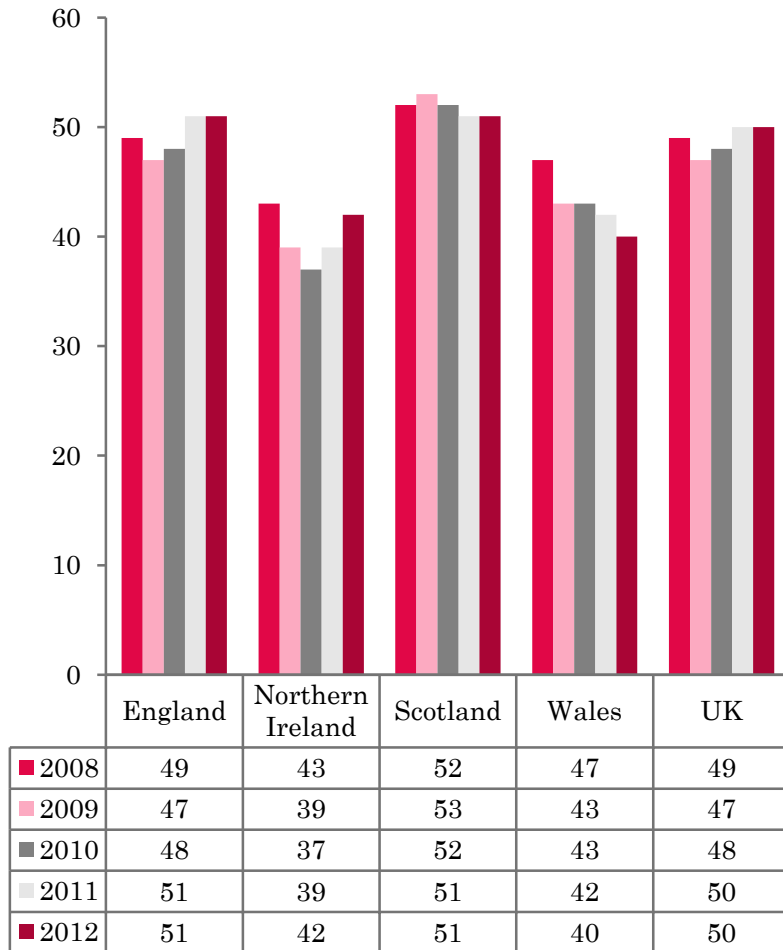


❖ 2265 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates.

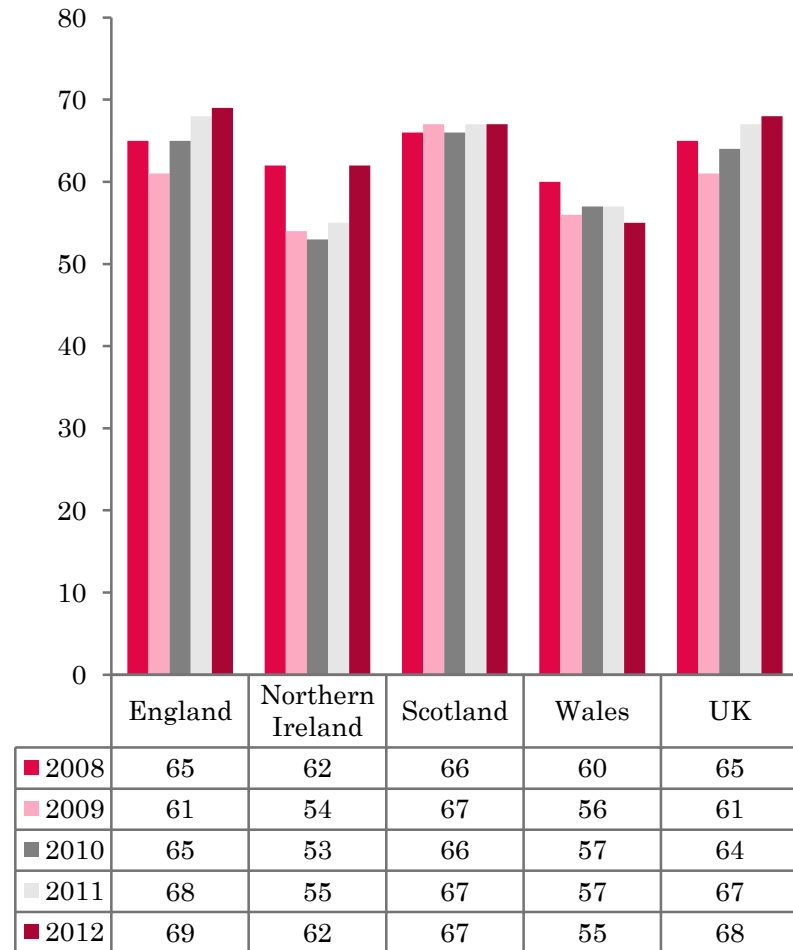
❖ UK bedspace occupancy (50%) has remained static (as in the previous month) remaining at its 2011 figure. UK bedroom occupancy (68%) increased by a single percentage point when compared with 2011.



NATIONAL BEDSPACE OCCUPANCY MAY 2008-2012



NATIONAL ROOM OCCUPANCY MAY 2008-2012



- ❖ Bedspace occupancy varied from 51% in England to 40% in Wales, whilst room occupancy varied from 68% in England to 55% in Wales.
- ❖ Room occupancy in the UK for May (as in 2011) was at its highest level since 2008, up 3 percentage points in that period. UK bedspace occupancy remained static when compared with May 2011.
- ❖ As with the UK figures, occupancy levels in England remained the same as May 2011, 3 percentage points above the 2008 figures for room and 2 percentage points higher for bedspace occupancy.
- ❖ When compared with May 2011, occupancy levels in Northern Ireland had increased by 7 percentage points for room, and 3 percentage points for bedspace occupancy.
- ❖ Scotland had remained on a par with the previous year whereas Wales had witnessed a 2% percentage point decrease in both room and bed occupancy levels when compared with May 2011.



Table 1: Occupancy Levels: May 2010 – 2012

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	48	51	51	65	68	69	1102	1719	1629
Northern Ireland	37	39	42	53	55	62	143	172	166
Scotland	52	51	51	66	67	67	392	373	322
Wales	43	42	40	57	57	55	196	157	148
UK	48	50	50	64	67	68	1833	2421	2265

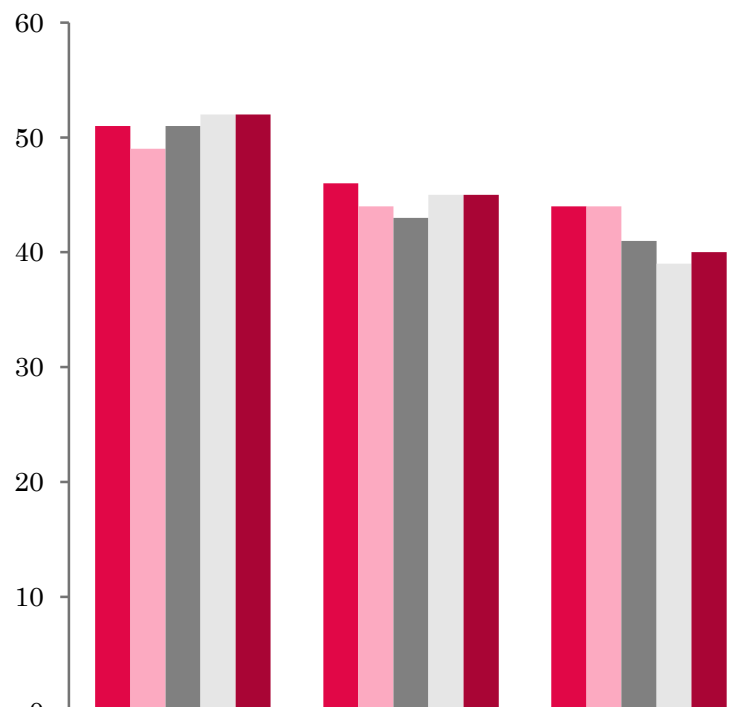
Table 2: UK/Non UK Occupancy Levels May 2010 – 2012 (see note 5a and 5b Slide 19)

	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	41	40	39	6	5	8	11	10	14	13	11	17	1102	1719	1629
Northern Ireland	24	20	21	13	19	21	33	46	42	35	49	50	143	172	166
Scotland	***	***	***	***	***	***	***	***	***	***	***	***	***	***	***
Wales	37	36	37	3	3	3	***	***	***	8	8	8	196	157	148
UK	40	39	38	6	5	8	11	11	15	13	12	17	1833	2421	2265

** FIGURES NOT AVAILABLE

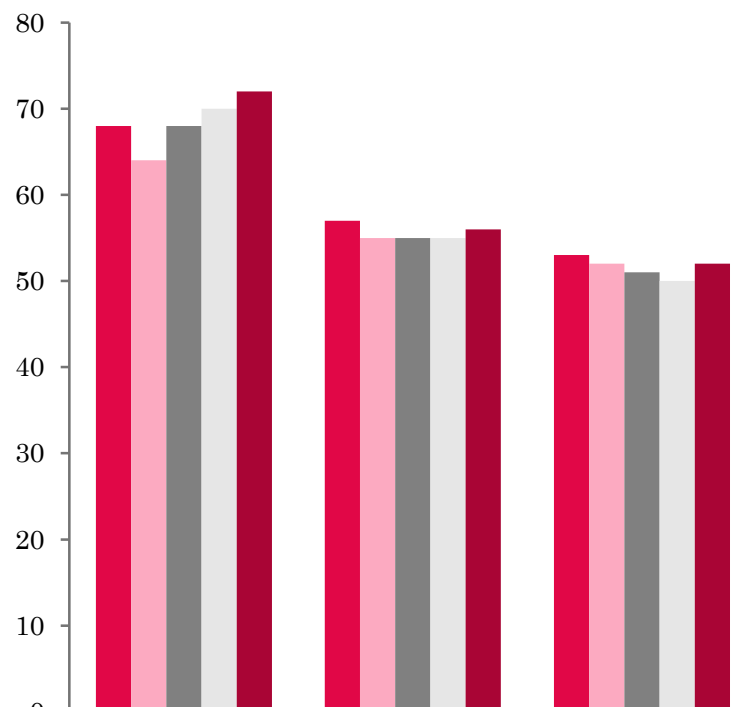


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION MAY 2008-2012



	Hotels	Guesthouses	B&Bs
2008	51	46	44
2009	49	44	44
2010	51	43	41
2011	52	45	39
2012	52	45	40

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



	Hotels	Guesthouses	B&Bs
2008	68	57	53
2009	64	55	52
2010	68	55	51
2011	70	55	50
2012	72	56	52



- ❖ Across the UK as a whole, occupancy levels in both hotels and guesthouses had remained as in 2011 while bed and breakfast establishments saw an increase of 2 percentage points in room occupancy and by 1 percentage point in bedspace occupancy (Table 3).
- ❖ When compared with May 2011, only those establishments with 26-50 and 51-100 letting bedrooms saw a rise in both measures of occupancy. Room and bedspace occupancy fell in establishments with 4-10, 11-25 and over 100 letting bedrooms, with bedspace occupancy remaining unchanged in the smallest size category (1-3), and falling by 1 percentage point in room occupancy (Tables 6 and 7).
- ❖ When compared with May 2011, occupancy levels rose in both City/large town and small town locations, (by 2 percentage points in the former and 1 percentage point in the latter). Bed occupancy also rose in both these locations with a 2 percentage point rise for small town locations and 1 percentage for City/large town locations. The seaside saw a similar rise in room occupancy as the small town locations but bedspace occupancy fell by 4 percentage points compared with the previous year. Countryside/village locations witnessed a fall in both room and bedspace occupancy (3 and 2 percentage points respectively). (Table 8).
- ❖ Only the largest size band (£60+) had seen an increase in both room and bedspace occupancy (by 1 percentage point respectively). Bedspace levels had fallen in 3 of the remaining tariff bands while the £40.00-£49.99 band had remained the same for both room and bedspace occupancy when compared with May 2011. Room occupancy in the £50-£59.99 band had fallen by 2 percentage points compared with the previous year (Tables 9 and 10 and note 5a, Slide 19).



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	51	52	53	68	71	73	351	1035	998
Northern Ireland	41	43	48	61	61	70	66	68	57
Scotland	55	54	53	70	71	72	243	236	214
Wales	48	46	44	64	64	61	102	83	72
UK	51	52	52	68	70	72	762	1422	1341
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	44	46	46	56	56	57	294	273	245
Northern Ireland	25	26	32	33	35	45	19	13	24
Scotland	45	49	48	57	60	60	65	63	46
Wales	36	34	30	45	44	41	38	29	31
UK	43	45	45	55	55	56	416	378	346
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	41	40	41	52	51	53	457	411	386
Northern Ireland	24	26	22	30	35	33	58	91	85
Scotland	46	42	43	54	51	53	84	74	62
Wales	33	30	32	40	37	38	56	45	45
UK	41	39	40	51	50	52	655	621	578



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: May 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	43	53	56	55	47	47	64	66	67	65	70	70
Northern Ireland	44	46	50	30	34	40	59	59	65	51	53	62
Scotland	58	56	55	48	48	48	68	66	66	65	67	68
Wales	51	48	46	36	37	37	60	59	55	54	56	56
UK	46	53	55	52	46	46	64	65	66	64	68	69



Table 5: Non-UK Percentages: May 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	14	8	11	9	11	17	15	11	15	11	12	18
Northern Ireland	31	44	45	37	53	52	33	48	53	38	55	46
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	7	7	7	9	9	8
UK	14	9	12	10	12	18	15	11	15	11	13	18

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Table 6: Occupancy Levels by Size: May 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	37	37	37	261	43	41	39	351	45	44	42	129
Northern Ireland	21	16	16	74	25	39	30	25	32	29	32	27
Scotland	42	38	41	54	45	51	46	68	49	50	51	50
Wales	28	29	23	37	39	36	38	50	44	41	39	24
UK	37	36	36	426	43	42	40	494	45	44	43	230

Table6: Occupancy Levels by Size: May 2010 - 2012

A (cont) : Percentage of Bedspace Occupancy												
	26 - 50 Rooms				51 - 100 Rooms				>100 Rooms⁵⁶			
	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012	2010	2011	2012	Sample Size 2012
England	51	48	52	80	59	50	57	41	49	54	54	767
Northern Ireland	35	39	37	14	42	40	49	19	47	49	56	7
Scotland	56	53	53	50	60	58	58	46	59	55	54	54
Wales	46	45	44	19	51	44	47	13	59	51	44	5
UK	51	48	51	163	58	50	56	119	51	54	53	833



Table 7: Occupancy Levels by Size: May 2010 – 2012

B: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	46	46	45	261	54	52	50	351	58	57	56	129
Northern Ireland	27	25	26	74	31	44	37	25	48	44	52	27
Scotland	51	47	52	54	55	62	59	68	62	64	65	50
Wales	34	35	28	37	49	46	47	50	58	55	50	24
UK	46	45	44	375	53	53	51	494	58	58	57	230

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

B (cont): 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	64	66	71	80	72	71	75	41	72	77	77	767
Northern Ireland	52	54	65	14	57	61	72	19	71	67	75	7
Scotland	71	67	70	50	78	76	78	46	78	77	78	54
Wales	60	60	63	19	69	67	70	13	74	73	63	5
UK	64	66	70	163	72	71	75	119	73	77	76	833



Table 8: Occupancy Levels by Location: May 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	44	49	44	235	52	54	57	595	47	44	46	358	47	48	46	441
Northern Ireland	39	38	40	37	38	43	49	48	35	30	30	53	33	29	19	28
Scotland	54	52	54	41	56	53	54	116	48	45	45	69	49	51	47	96
Wales	50	45	45	38	46	43	37	14	46	39	44	24	37	39	36	72
UK	46	49	45	351	52	53	55	773	47	44	45	504	46	47	45	637

Table 8: Occupancy Levels by Location: May 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	57	56	58	235	72	75	77	595	62	63	66	358	57	62	60	441
Northern Ireland	52	50	59	37	58	63	72	48	51	40	41	53	43	37	26	28
Scotland	65	66	66	41	74	74	77	116	62	59	60	69	58	61	60	96
Wales	65	59	59	38	63	65	57	14	65	62	63	24	46	48	46	72
UK	58	57	59	351	71	74	75	773	62	62	64	504	56	61	58	637

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	**	**	**	**	29	25	21	49	35	31	30	182
Northern Ireland	**	**	**	**	25	28	22	23	22	23	27	49
Scotland	**	**	**	**	44	32	35	21	46	47	42	70
Wales	**	**	**	**	24	24	14	14	36	33	34	47
UK	**	**	**	**	31	26	23	107	36	33	32	348

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	48	47	46	188	43	49	47	94	51	51	53	1083
Northern Ireland	26	32	32	34	38	45	29	13	43	43	49	42
Scotland	53	50	55	33	51	57	50	36	55	55	54	162
Wales	40	41	40	20	44	51	46	13	52	46	44	54
UK	48	47	47	275	44	50	47	156	52	51	52	1341

** FIGURES NOT AVAILABLE

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

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	**	**	**	**	37	35	34	49	47	41	40	182
Northern Ireland	**	**	**	**	30	37	38	23	29	30	36	49
Scotland	**	**	**	**	55	41	46	21	65	59	58	70
Wales	**	**	**	**	29	29	20	14	47	44	43	47
UK	**	**	**	**	39	35	35	107	49	43	43	348

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) May 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	57	56	56	188	53	61	60	94	67	72	73	1083
Northern Ireland	41	51	48	34	48	58	39	13	63	62	72	42
Scotland	64	63	68	33	63	70	65	36	71	72	73	162
Wales	53	55	53	20	57	61	59	13	67	65	62	54
UK	57	57	57	275	54	62	60	156	67	71	72	1341

** 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 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 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)

