



UNITED KINGDOM OCCUPANCY SURVEY

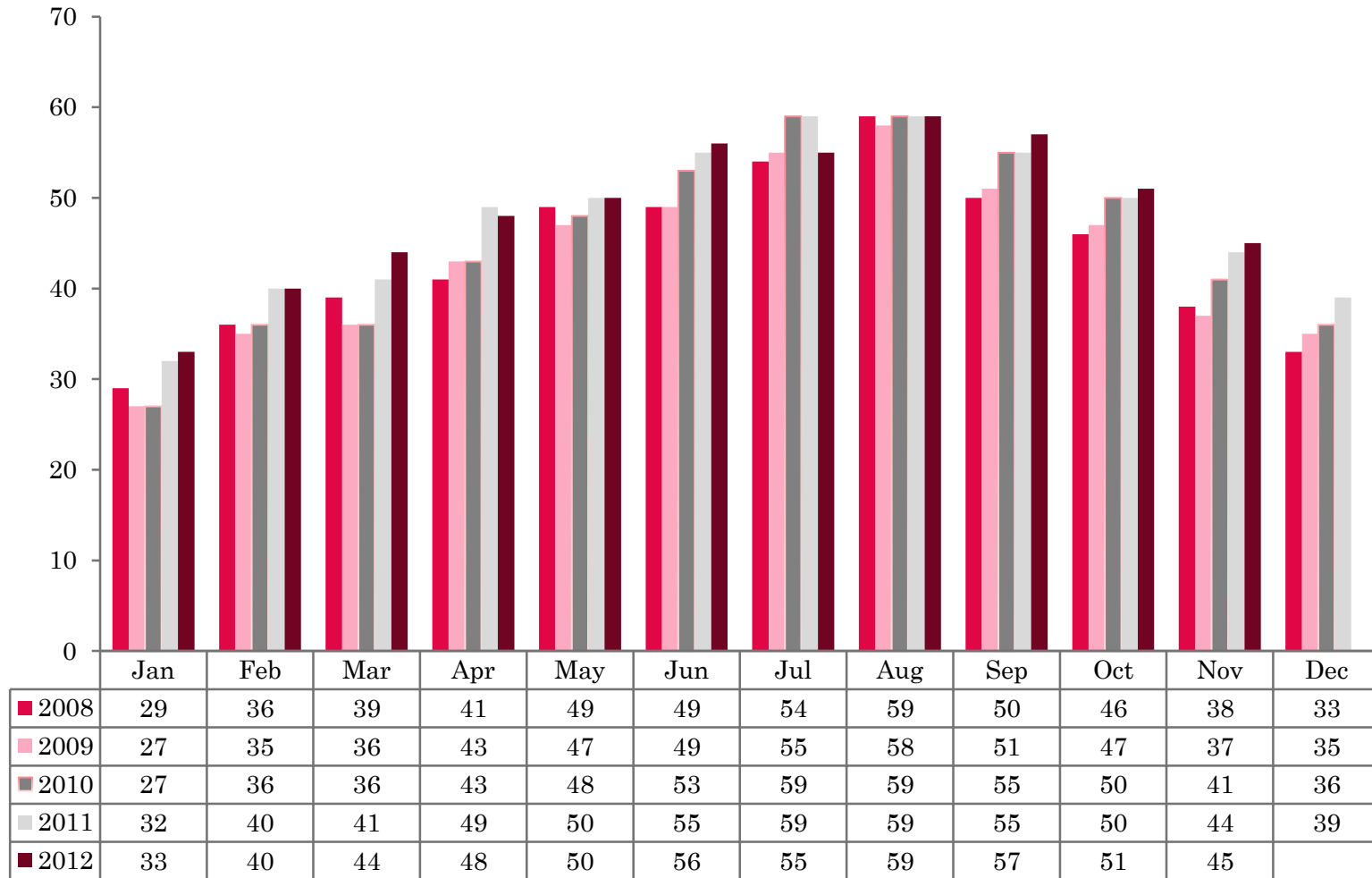
Serviced Accommodation Summary Report
November 2012

UK OCCUPANCY SURVEY

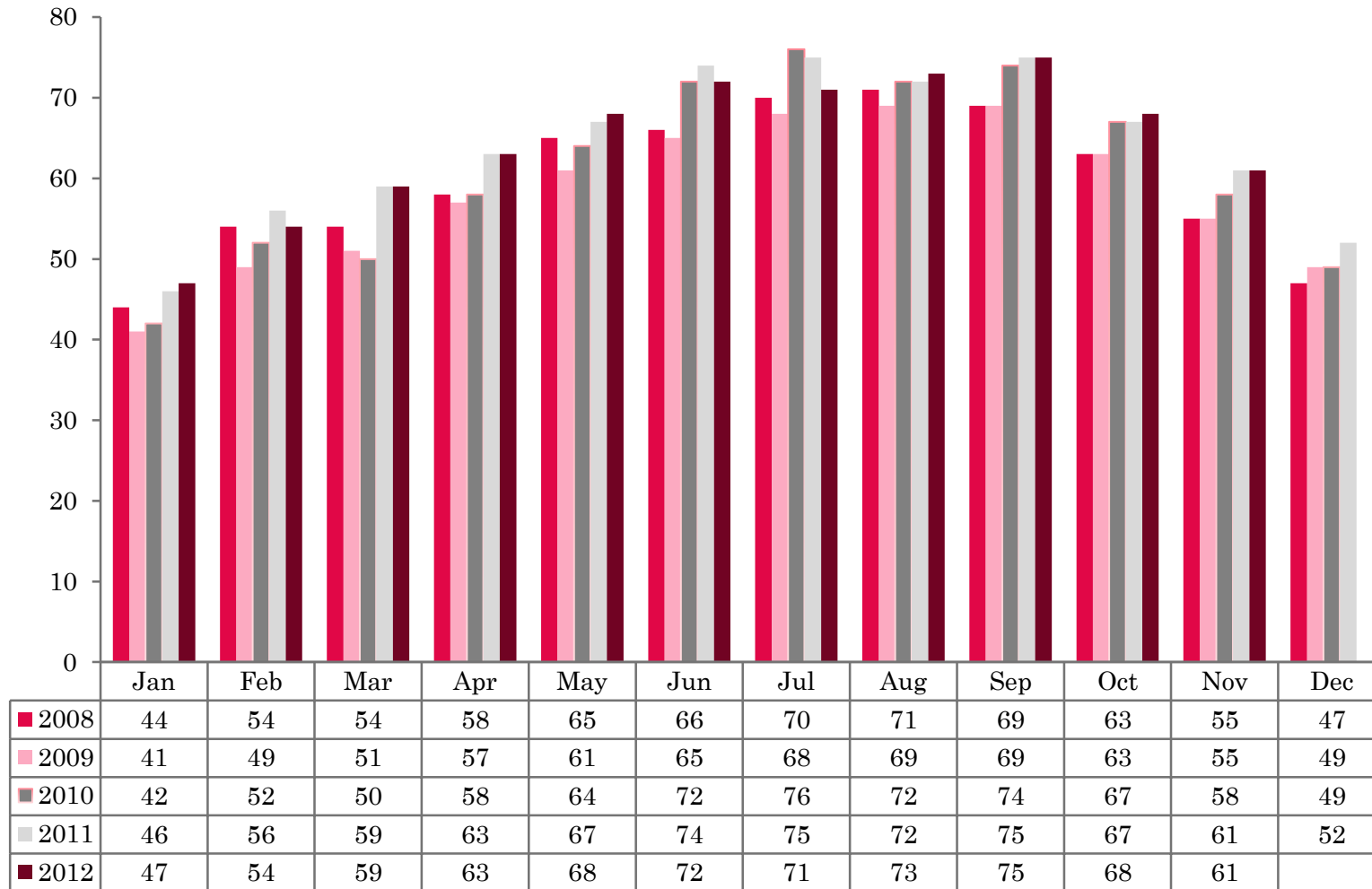
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2008 - 2012



UK BEDROOM OCCUPANCY 2008 - 2012

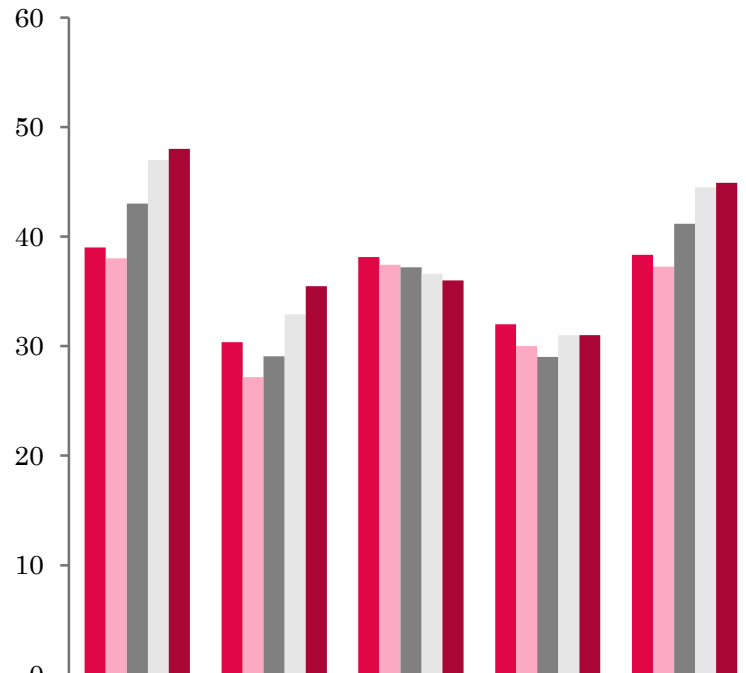


❖ 2,084 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

❖ UK bedspace (45%) had risen by 1 percentage point when compared with the same period in November 2011. UK bedroom (61%) remained at the same level when compared with the previous year.

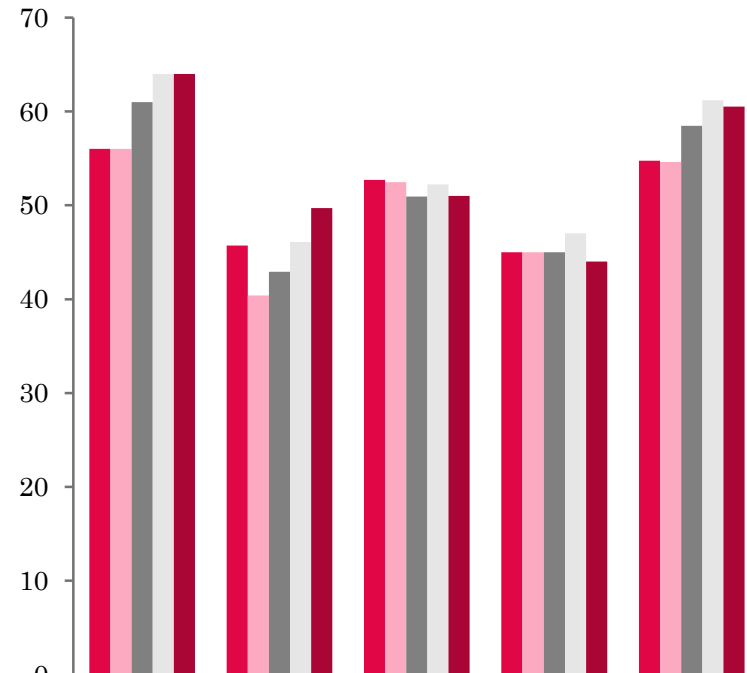


NATIONAL BEDSPACE OCCUPANCY NOVEMBER 2008-2012



	England	Northern Ireland	Scotland	Wales	UK
2008	39	30	38	32	38
2009	38	27	37	30	37
2010	43	29	37	29	41
2011	47	33	37	31	44
2012	48	35	36	31	45

NATIONAL ROOM OCCUPANCY NOVEMBER 2008-2012



	England	Northern Ireland	Scotland	Wales	UK
2008	56	46	53	45	55
2009	56	40	52	45	55
2010	61	43	51	45	58
2011	64	46	52	47	61
2012	64	50	51	44	61



- ❖ Bedspace occupancy varied from 48% in England to 31% in Wales during November 2012.
- ❖ Across the UK as a whole, bedspace occupancy in the UK had seen a small increase of 1 percentage point when compared with 2011, at its highest level in 5 years. Room occupancy stayed at the same level as the same period the previous year.
- ❖ England witnessed an increase in bed occupancy, up 1 percentage point compared with November 2011.
- ❖ Occupancy levels in Scotland had fallen by 1 percentage point for both bedspace and room occupancy when compared with November 2011.
- ❖ Northern Ireland witnessed an increase in both measures of occupancy during November 2012. Room occupancy rose by 4 percentage points, and by 2 percentage points for bedspace occupancy.
- ❖ Bedspace occupancy by non-UK residents had fallen slightly during November (by 1 percentage point) with England falling by the same percentage. Both Northern Ireland and Wales had remained at the same level as in 2011. (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: November 2010 – 2012

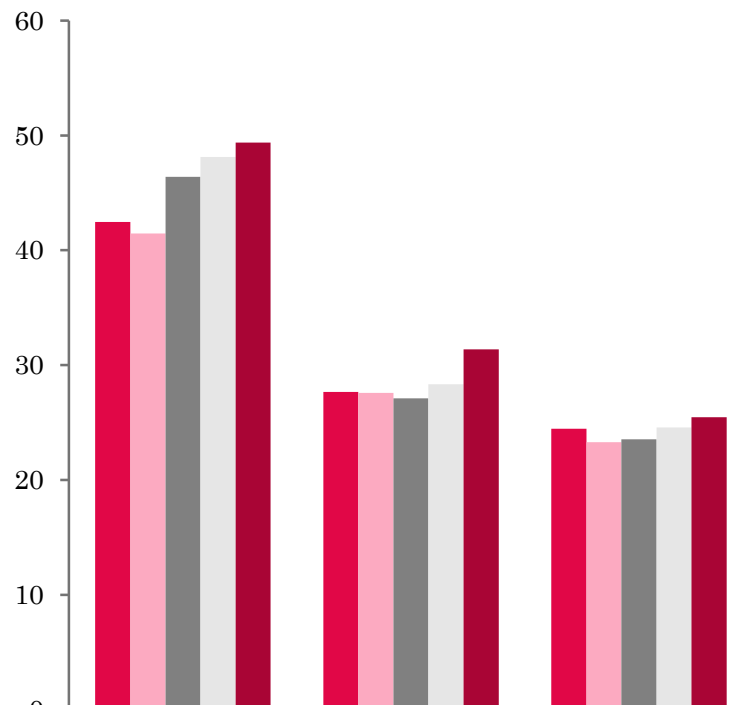
	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	43	47	48	61	64	64	1516	1640	1533
Northern Ireland	29	33	35	43	46	50	159	156	144
Scotland	37	37	36	51	52	51	341	300	297
Wales	29	31	31	45	47	44	163	147	110
UK	41	44	45	58	61	61	2179	2243	2084

Table 2: UK/Non UK Occupancy Levels November 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	27	35	33	5	6	5	8	12	9	15	15	13	1516	1640	1533
Northern Ireland	18	17	19	11	16	16	33	46	52	38	48	46	159	156	144
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	341	300	297
Wales	23	26	28	2	1	1	**	**	**	7	5	3	163	147	110
UK	27	34	32	5	6	5	9	13	10	15	15	13	2179	2243	2084

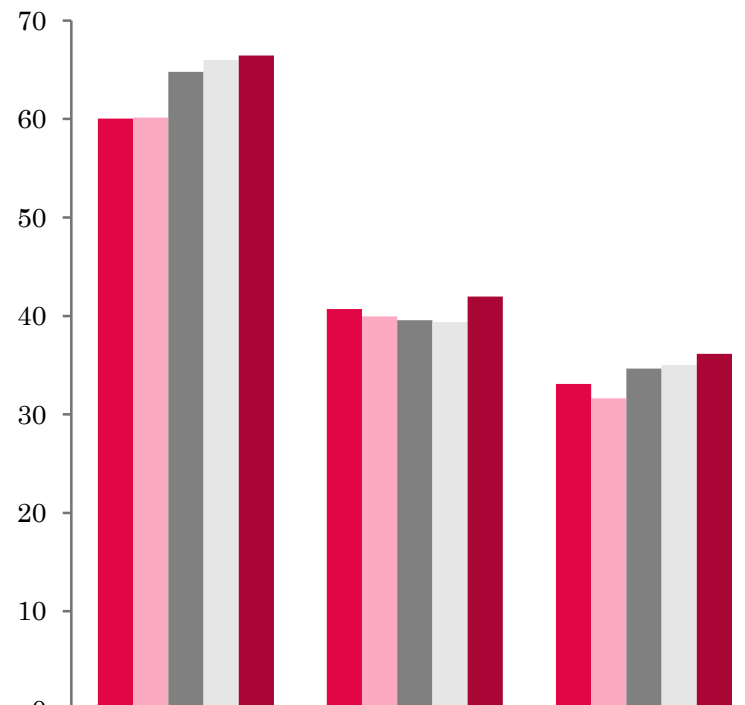
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UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION NOVEMBER 2008-2012

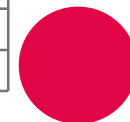


	Hotels	Guesthouses	B&Bs
2008	42	28	24
2009	41	28	23
2010	46	27	24
2011	48	28	25
2012	49	31	25

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



	Hotels	Guesthouses	B&Bs
2008	60	41	33
2009	60	40	32
2010	65	40	35
2011	66	39	35
2012	66	42	36



- UK figures showed that occupancy levels in hotels had increased their bedspace occupancy levels (up 1 percentage point) and remained static in room occupancy. Occupancy levels in guesthouse accommodation had increased by 3 percentage in both bedspace and room occupancy when compared to the same period in 2011. Bed occupancy for B&B establishments remained at the same level when compared with November 2011. (Table 3).
- During November 2012, the results were more diverse in the size band categories with the 1-3 and 26-50 room size bandings increasing in both measures of occupancy. Bed occupancy saw a slight drop in the 11-25 size band, whereas all other size bands witnessed an increase in occupancy apart from the 4-10 banding which remained constant when compared to the previous year. Room occupancy remained static in the 4-10, 11-25 and 100+ banding with a small downturn reported in the 51-100 category. (Tables 6 and 7).
- When compared with November 2011, bedroom occupancy levels in all location types had increased, with the exception of the countryside/village location, decreasing by 3 percentage points. Small towns saw the biggest increase rising by 4 percentage points when compared to 2011. Bedspace occupancy was more varied as both seaside and city/large town occupancy increased, small towns remained static, and countryside/village falling slightly. City/large town saw the biggest increase rising by 4 percentage points. (Table 8).
- When looking at occupancy levels by tariff, there were increases in both bedspace and room occupancy levels for the £20.00-£29.99 and £60.00+ tariffs, when compared with November 2011. Across all other tariff bandings both room and bed occupancy levels decreased. Interestingly this trend seems to indicate people are either opting for a lower budget option on accommodation (£20.00-£29.99) or the higher end option (£60+) with the mid range tariff bandings faring less well during this period.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	48	50	52	67	68	69	907	1041	986
Northern Ireland	34	39	43	50	54	59	78	67	51
Scotland	43	42	42	58	60	60	230	215	214
Wales	36	38	37	54	56	53	92	81	59
UK	46	48	49	65	66	66	1307	1404	1310
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	29	31	35	42	43	47	244	234	205
Northern Ireland	10	17	37	16	24	45	17	12	18
Scotland	23	20	19	35	28	25	48	37	38
Wales	16	14	14	24	20	19	31	26	22
UK	27	28	31	40	39	42	340	309	283
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	25	27	28	37	39	40	365	365	342
Northern Ireland	15	12	12	22	18	18	64	77	82
Scotland	17	15	18	25	21	25	63	48	45
Wales	20	16	16	27	16	21	40	40	29
UK	24	25	25	35	35	36	532	530	498



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: November 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	47	51	50	41	44	44	57	60	61	64	66	67
Northern Ireland	33	38	43	23	26	27	43	53	52	41	44	43
Scotland	43	40	40	34	33	33	51	48	49	52	52	53
Wales	34	36	33	26	28	28	45	45	42	44	48	45
UK	45	48	47	39	41	41	55	57	58	61	63	63



Table 5: Non-UK Percentages: November 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	6	10	8	10	14	10	12	13	14	17	16	16
Northern Ireland	34	47	54	39	46	59	42	52	47	40	53	52
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	5	3	3	9	6	4
UK	7	11	9	11	15	11	12	13	14	17	16	16

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Table 6: Occupancy Levels by Size: November 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	20	21	22	227	26	27	28	304	35	37	36	116
Northern Ireland	8	9	10	65	21	13	21	18	23	23	25	23
Scotland	13	13	15	39	32	22	22	54	35	36	35	47
Wales	16	11	12	26	22	21	20	34	31	35	28	20
UK	19	19	20	357	26	26	26	410	35	37	35	206

Table6: Occupancy Levels by Size: November 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	39	44	48	74	50	54	60	43	52	52	53	769
Northern Ireland	27	24	28	15	28	36	42	15	47	47	49	8
Scotland	40	37	38	55	53	49	49	48	50	49	50	54
Wales	33	34	41	14	46	45	45	11	43	39	39	5
UK	39	42	46	158	50	53	57	117	51	51	52	836



Table 7: Occupancy Levels by Size: November 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	29	30	30	227	36	38	38	304	51	52	53	116
Northern Ireland	13	15	16	65	26	18	25	18	37	38	37	23
Scotland	20	18	22	39	42	31	29	54	47	48	47	47
Wales	22	14	17	26	31	27	26	34	47	50	38	20
UK	27	27	28	375	36	36	36	410	50	51	51	206

Table 7: Occupancy Levels by Size: November 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	58	56	64	74	65	69	68	43	75	76	75	769
Northern Ireland	40	47	44	15	50	57	51	15	60	55	70	8
Scotland	54	53	53	55	69	68	69	48	73	72	73	54
Wales	50	50	57	14	62	68	63	11	64	62	60	5
UK	57	55	62	158	65	69	67	117	74	74	74	836



Table 8: Occupancy Levels by Location Types: November 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	33	37	39	202	55	54	58	588	36	40	41	341	30	39	37	402
Northern Ireland	21	23	24	31	35	40	43	44	27	22	28	41	17	11	15	28
Scotland	31	33	31	33	46	44	47	121	30	28	26	64	32	28	27	79
Wales	35	38	37	29	36	35	37	11	29	33	34	17	24	24	21	53
UK	33	36	37	295	52	51	55	764	35	38	38	463	30	36	34	562

Table 8: Occupancy Levels by Location Types: November 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	46	49	51	202	74	72	73	588	56	56	61	341	42	53	50	402
Northern Ireland	27	33	32	31	52	54	65	44	43	33	31	41	21	17	22	28
Scotland	40	40	43	33	65	66	69	121	43	42	40	64	42	36	35	79
Wales	49	52	48	29	61	58	58	11	48	50	53	17	34	32	28	53
UK	45	48	49	295	72	70	71	764	54	53	57	463	41	49	46	562

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	**	**	**	**	15	19	28	43	23	22	21	147
Northern Ireland	**	**	**	**	16	14	12	30	7	11	10	34
Scotland	**	**	**	**	21	14	23	18	32	21	20	51
Wales	**	**	**	**	19	10	15	9	19	20	19	37
UK	**	**	**	**	16	18	26	100	24	22	20	269

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	26	29	29	173	34	37	36	82	47	49	52	320
Northern Ireland	25	26	24	26	28	29	40	12	36	40	43	42
Scotland	32	28	24	32	42	38	34	41	41	45	46	155
Wales	22	26	23	12	40	51	42	10	36	35	36	42
UK	26	29	28	243	35	38	36	145	45	47	50	559

** FIGURES NOT AVAILABLE



Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	**	**	**	**	27	33	40	43	33	34	31	147
Northern Ireland	**	**	**	**	19	23	17	30	12	17	15	34
Scotland	**	**	**	**	32	19	30	18	45	34	31	51
Wales	**	**	**	**	21	15	20	9	30	26	26	37
UK	**	**	**	**	27	30	37	100	34	33	30	269

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) November 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	35	37	37	173	48	50	48	82	67	68	70	320
Northern Ireland	40	39	36	26	37	45	47	12	52	54	61	42
Scotland	44	44	37	32	55	51	50	41	55	61	63	155
Wales	34	33	32	12	52	61	50	10	55	55	53	42
UK	36	38	37	243	49	51	48	145	65	66	68	559

** 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)

