



# UNITED KINGDOM OCCUPANCY SURVEY

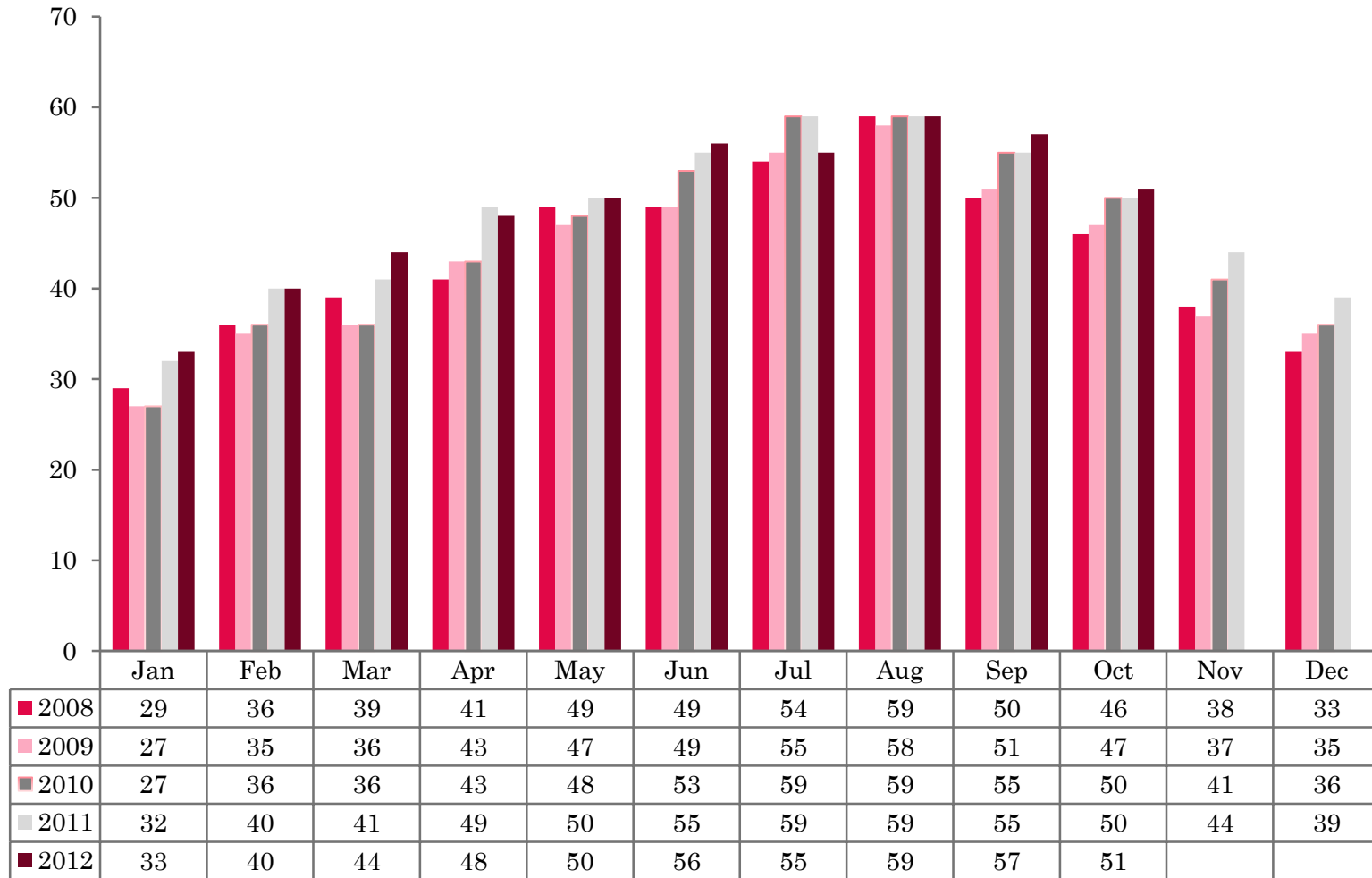
Serviced Accommodation Summary Report  
October 2012

# UK OCCUPANCY SURVEY

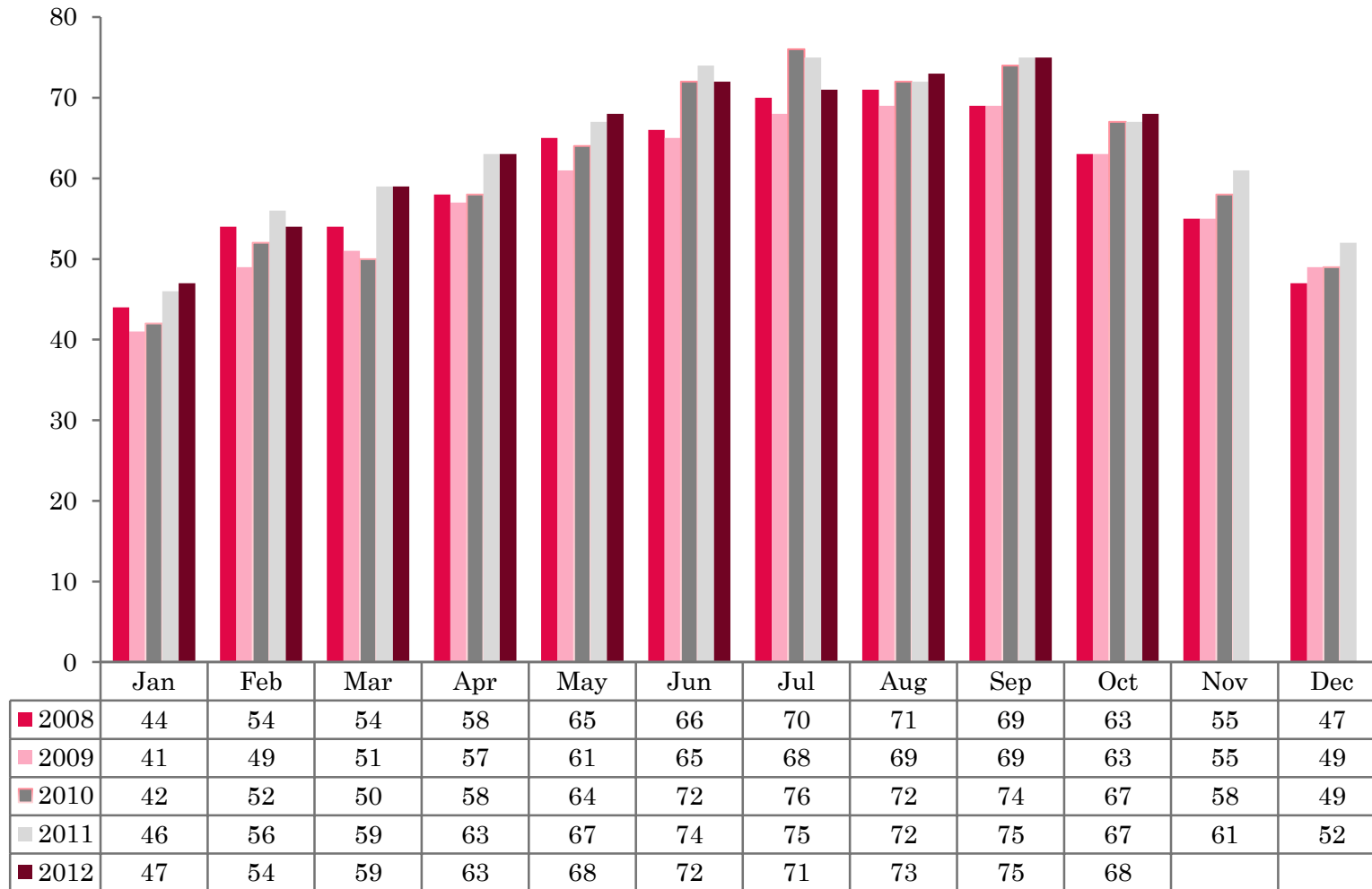
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



# UK BEDSPACE OCCUPANCY 2008 - 2012



# UK BEDROOM OCCUPANCY 2008 - 2012

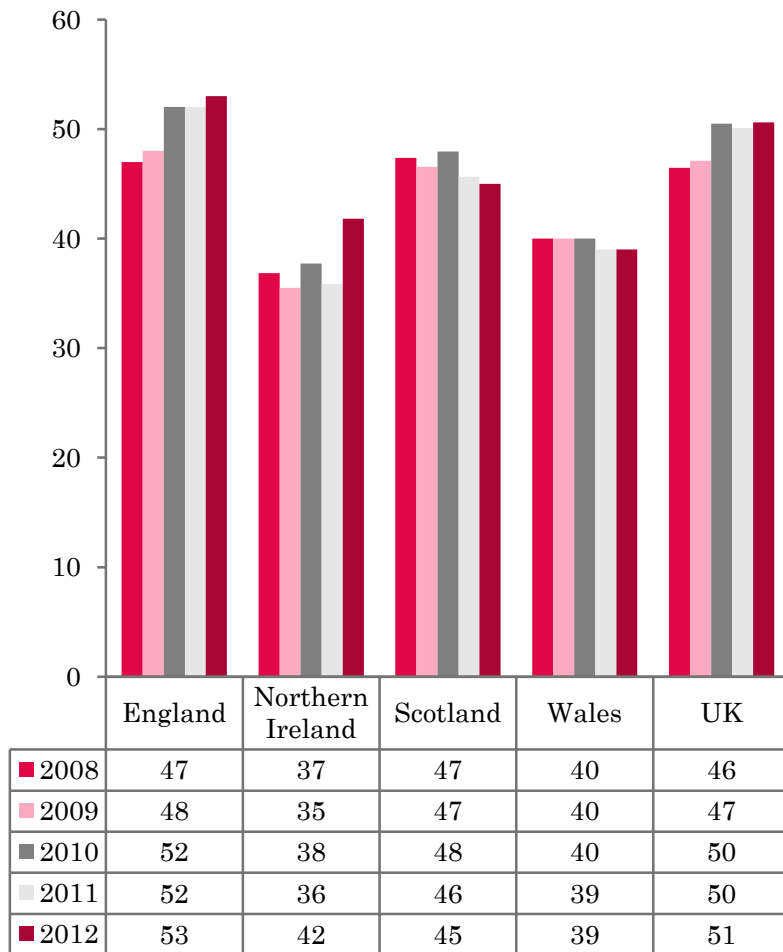


❖ 2,194 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

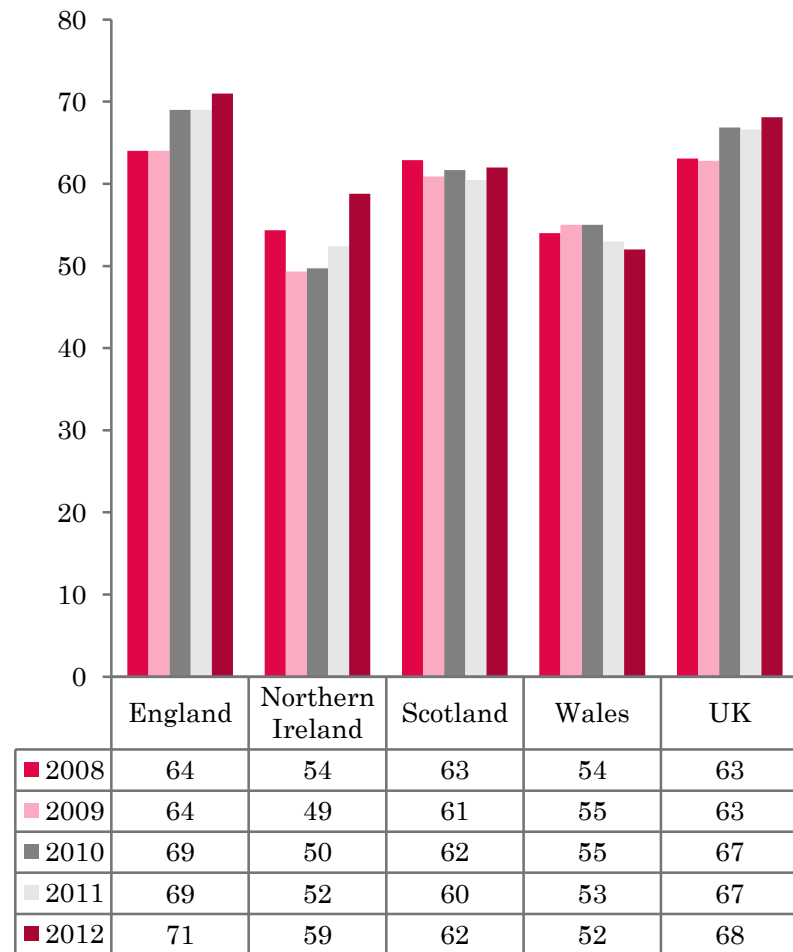
❖ Both UK bedspace (51%) and room occupancy (68%) had risen by 1 percentage point when compared with the same period in October 2011.




## NATIONAL BEDSPACE OCCUPANCY OCTOBER 2008-2012



## NATIONAL ROOM OCCUPANCY OCTOBER 2008-2012



- ❖ Bedspace occupancy varied from 53% in England to 39% in Wales. Northern Ireland witnessed the biggest increase in room occupancy, up 7 percentage points compared with October 2011.
  - ❖ During October 2012, both room and bedspace occupancy in the UK had seen a small increase of 1 percentage point respectively when compared with 2011, at their highest level since 2008.
  - ❖ Occupancy levels in Scotland had fallen by 1 percentage points for bedspace occupancy and had risen by 1 percentage point for room occupancy when compared with October 2011.
  - ❖ Both England and Northern Ireland had witnessed an increase in both measures of occupancy in October 2012 (the largest increase was for Northern Ireland by 7 percentage points for room, and 6 percentage points for bedspace occupancy).
  - ❖ Bedspace occupancy by non-UK residents had increased in Northern Ireland by 3 percentage points whilst bed occupancy for non-UK residents in England had remained at the same level since 2010. (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) Slide 19)).
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**Table 1: Occupancy Levels: October 2010 – 2012**

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	52	52	53	69	69	71	1647	1715	1580
Northern Ireland	38	36	42	50	52	59	165	154	173
Scotland	48	46	45	62	60	62	358	332	307
Wales	40	39	39	55	53	52	194	159	134
<b>UK</b>	50	50	51	67	67	68	2364	2360	2194

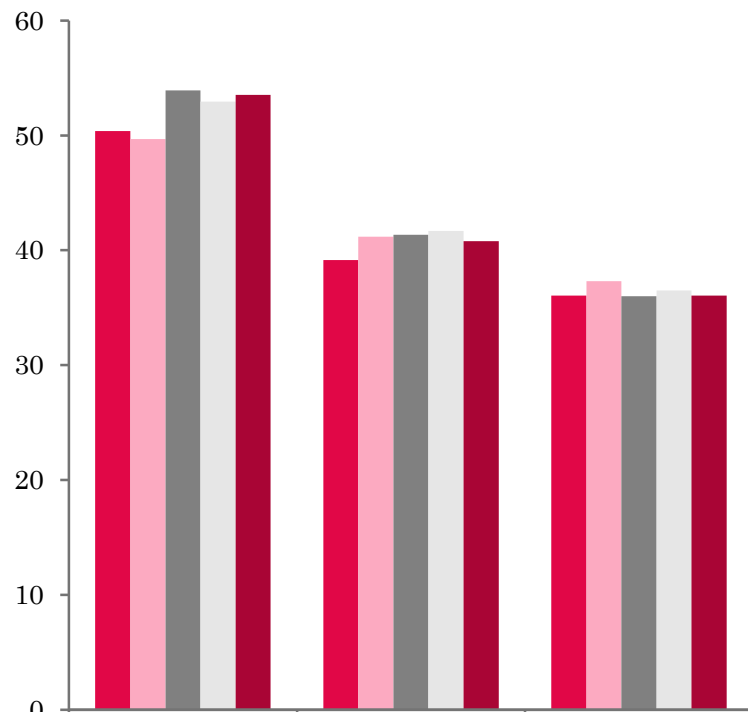
**Table 2: UK/Non UK Occupancy Levels October 2010 – 2012 (see note 5a and 5b Slide 19)**

	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	42	39	41	6	6	6	9	11	9	12	13	12	1647	1715	1580
Northern Ireland	24	17	20	13	19	22	33	31	30	35	52	53	165	154	173
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	358	332	307
Wales	34	35	35	3	2	2	0	0	0	7	5	4	194	159	134
<b>UK</b>	41	38	40	6	6	6	10	11	10	12	13	12	2364	2360	2194

\*\* FIGURES NOT AVAILABLE

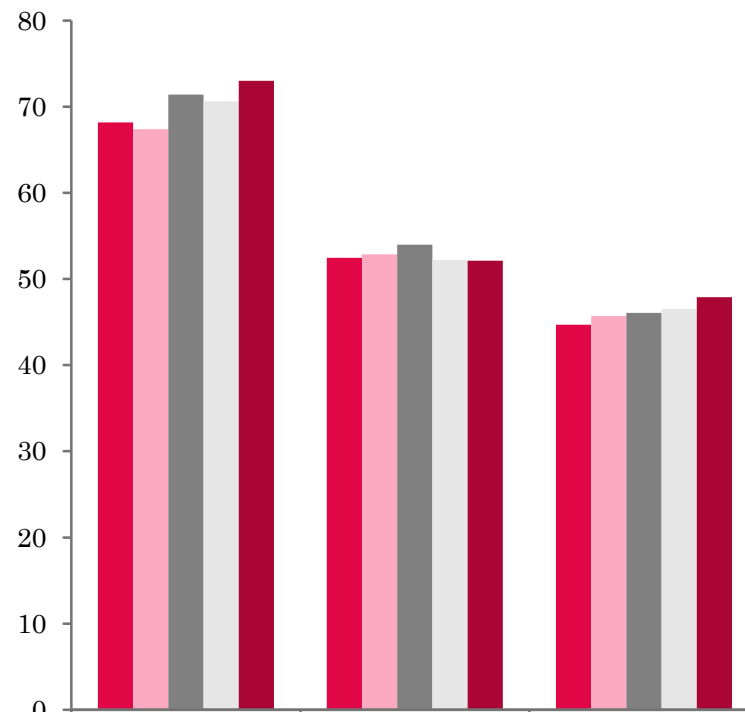


## UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION OCTOBER 2008-2012



	Hotels	Guesthouses	B&Bs
2008	50	39	36
2009	50	41	37
2010	54	41	36
2011	53	42	37
2012	54	41	36

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



	Hotels	Guesthouses	B&Bs
2008	68	52	45
2009	67	53	46
2010	71	54	46
2011	71	52	47
2012	73	52	48



- ❖ Across the UK as a whole, occupancy levels had increased in hotels in both bedspace and room occupancy (up 1 percentage in bed and 2 points in room). Occupancy levels in Guesthouse and B&B establishments had decreased in bedspace occupancy (1 percentage point respectively), whilst room occupancy in B&B accommodation had risen by 1 percentage point. Room occupancy for Guesthouse establishments remained at the same level when compared with October 2011. (Table 3).
- ❖ During October 2012, the picture was fairly mixed in the size band categories with only the 26-50 and 51-100 room size bandings increasing in both measures of occupancy. The 4-10 and 11-25 size bands had both decreased during this month, with the smaller size band (4-10) faring worst with a 4 percentage point drop in bedspace occupancy and 3 percentage points in room. Both the smallest size band 1-3 and the largest, 100+ had seen an increase in room occupancy levels but had remained at the same levels as in 2011 for bedspace occupancy. (Tables 6 and 7).
- ❖ When compared with October 2011, bedspace occupancy levels in all locations had increased, with the exception of the countryside/village location, decreasing by 2 percentage points in bedspace occupancy and by 1 in room occupancy. Seaside locations fared the best with the biggest increase in room occupancy (up 4 percentage points) and by 2 percentage points for bedspace occupancy. (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, £40.00-£49.99 and £60.00+ tariffs, when compared with October 2011, whilst a fall in both measures of occupancy was seen in the £30.00-£39.99 and £50.00-£59.99 tariff bands.



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

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	55	54	55	73	72	75	932	1052	997
Northern Ireland	43	41	46	57	60	65	75	63	63
Scotland	53	52	51	68	68	70	234	223	216
Wales	45	45	45	62	61	60	106	83	76
<b>UK</b>	54	53	54	71	71	73	1347	1421	1352
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	43	45	44	56	56	56	277	256	225
Northern Ireland	25	19	52	30	30	63	21	13	9
Scotland	39	33	32	51	42	42	53	51	41
Wales	30	23	21	41	31	28	37	28	24
<b>UK</b>	41	42	41	54	52	52	388	348	299
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	38	39	38	49	50	51	438	407	358
Northern Ireland	20	21	21	24	29	28	69	78	101
Scotland	28	28	32	35	37	42	71	58	50
Wales	32	27	28	38	26	32	51	48	34
<b>UK</b>	36	37	36	46	47	48	629	591	543



**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: October 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	56	56	57	49	49	49	66	66	69	71	70	72
Northern Ireland	42	42	49	30	29	36	51	56	61	46	48	57
Scotland	50	48	49	47	44	43	59	58	60	65	63	64
Wales	46	44	45	35	35	35	56	53	54	54	54	51
<b>UK</b>	54	54	55	48	47	47	64	64	66	69	68	69



**Table 5: Non-UK Percentages: October 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	8	10	8	10	12	10	11	12	12	13	14	14
Northern Ireland	33	32	30	36	37	35	36	55	55	38	57	58
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	6	4	3	8	6	5
<b>UK</b>	9	10	9	11	13	11	11	12	12	13	14	14

**\*\* FIGURES NOT AVAILABLE**



**Table 6: Occupancy Levels by Size: October 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	34	33	33	242	42	42	38	326	48	47	46	124
Northern Ireland	14	12	18	73	31	27	26	26	30	28	30	28
Scotland	24	24	30	42	45	37	34	57	46	50	47	50
Wales	27	20	17	29	35	33	31	40	41	43	36	24
<b>UK</b>	32	31	31	386	42	41	37	449	47	47	45	226

**Table6: Occupancy Levels by Size: October 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	53	53	56	76	58	53	58	42	56	56	56	770
Northern Ireland	37	32	31	18	37	41	47	21	55	47	56	7
Scotland	52	46	47	54	59	55	54	45	59	56	56	59
Wales	44	41	46	21	51	45	51	13	55	48	48	7
<b>UK</b>	52	51	53	169	57	53	57	121	56	55	55	843

**Table 7: Occupancy Levels by Size: October 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	43	41	42	242	52	53	49	326	61	60	61	124
Northern Ireland	17	21	27	73	36	34	30	26	43	42	43	28
Scotland	31	33	40	42	56	46	47	57	59	62	60	50
Wales	32	24	22	29	46	38	39	40	54	54	47	24
<b>UK</b>	40	39	40	375	52	51	48	449	60	60	59	226

**Table 7: Occupancy Levels by Size: October 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	69	66	72	76	72	69	75	42	79	78	80	770
Northern Ireland	51	52	55	18	55	61	65	21	65	66	74	7
Scotland	66	60	66	54	75	73	74	45	79	77	80	59
Wales	59	57	60	21	68	67	71	13	75	67	66	7
<b>UK</b>	68	64	70	169	72	69	74	121	79	77	79	843



**Table 8: Occupancy Levels by Location: October 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
<b>England</b>	45	45	48	227	60	58	59	590	46	46	47	345	47	48	46	418
<b>Northern Ireland</b>	35	34	35	42	43	40	47	50	37	28	28	51	24	18	27	33
<b>Scotland</b>	48	48	42	40	54	52	52	121	44	37	41	69	43	40	38	77
<b>Wales</b>	46	45	41	35	48	41	43	15	36	37	41	22	36	35	34	62
<b>UK</b>	45	45	46	344	58	56	57	776	45	44	45	487	45	46	44	590

**Table 8: Occupancy Levels by Location: October 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
<b>England</b>	56	54	61	227	79	76	78	590	65	65	68	345	59	61	60	418
<b>Northern Ireland</b>	46	43	46	42	57	61	69	50	48	36	35	51	30	32	38	33
<b>Scotland</b>	58	58	56	40	71	71	75	121	59	50	57	69	53	52	50	77
<b>Wales</b>	59	58	52	35	70	62	63	15	56	59	61	22	46	40	42	62
<b>UK</b>	56	55	59	344	77	74	76	776	63	62	65	487	57	58	57	590



**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	**	**	**	**	33	34	38	45	38	39	32	163
Northern Ireland	**	**	**	**	18	23	22	30	16	16	31	44
Scotland	**	**	**	**	34	22	31	22	40	33	32	72
Wales	**	**	**	**	26	17	17	10	30	27	29	40
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>32</b>	<b>31</b>	<b>35</b>	<b>107</b>	<b>37</b>	<b>37</b>	<b>32</b>	<b>319</b>

**Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	39	40	42	185	49	49	47	86	54	54	55	1063
Northern Ireland	26	35	29	28	35	20	33	21	46	41	48	50
Scotland	47	38	38	35	49	51	46	34	55	54	53	168
Wales	34	43	36	18	49	51	44	16	47	43	45	50
<b>UK</b>	<b>39</b>	<b>40</b>	<b>41</b>	<b>266</b>	<b>49</b>	<b>49</b>	<b>46</b>	<b>157</b>	<b>54</b>	<b>53</b>	<b>54</b>	<b>1331</b>

**\*\* FIGURES NOT AVAILABLE**



**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 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	42	47	45	48	49	42	163
Northern Ireland	**	**	**	**	20	31	32	30	20	25	41	44
Scotland	**	**	**	**	46	29	46	22	56	46	47	72
Wales	**	**	**	**	27	19	23	10	39	34	37	40
<b>UK</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>**</b>	<b>43</b>	<b>39</b>	<b>45</b>	<b>107</b>	<b>48</b>	<b>47</b>	<b>42</b>	<b>319</b>

**Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) October 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	48	49	52	185	61	62	61	86	73	72	75	1063
Northern Ireland	39	50	41	28	43	36	45	21	60	61	67	50
Scotland	59	52	50	35	60	65	65	34	70	70	72	168
Wales	51	52	46	18	59	61	55	16	65	60	61	50
<b>UK</b>	<b>49</b>	<b>50</b>	<b>51</b>	<b>266</b>	<b>60</b>	<b>62</b>	<b>61</b>	<b>157</b>	<b>72</b>	<b>71</b>	<b>73</b>	<b>1331</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)

