



UNITED KINGDOM OCCUPANCY SURVEY

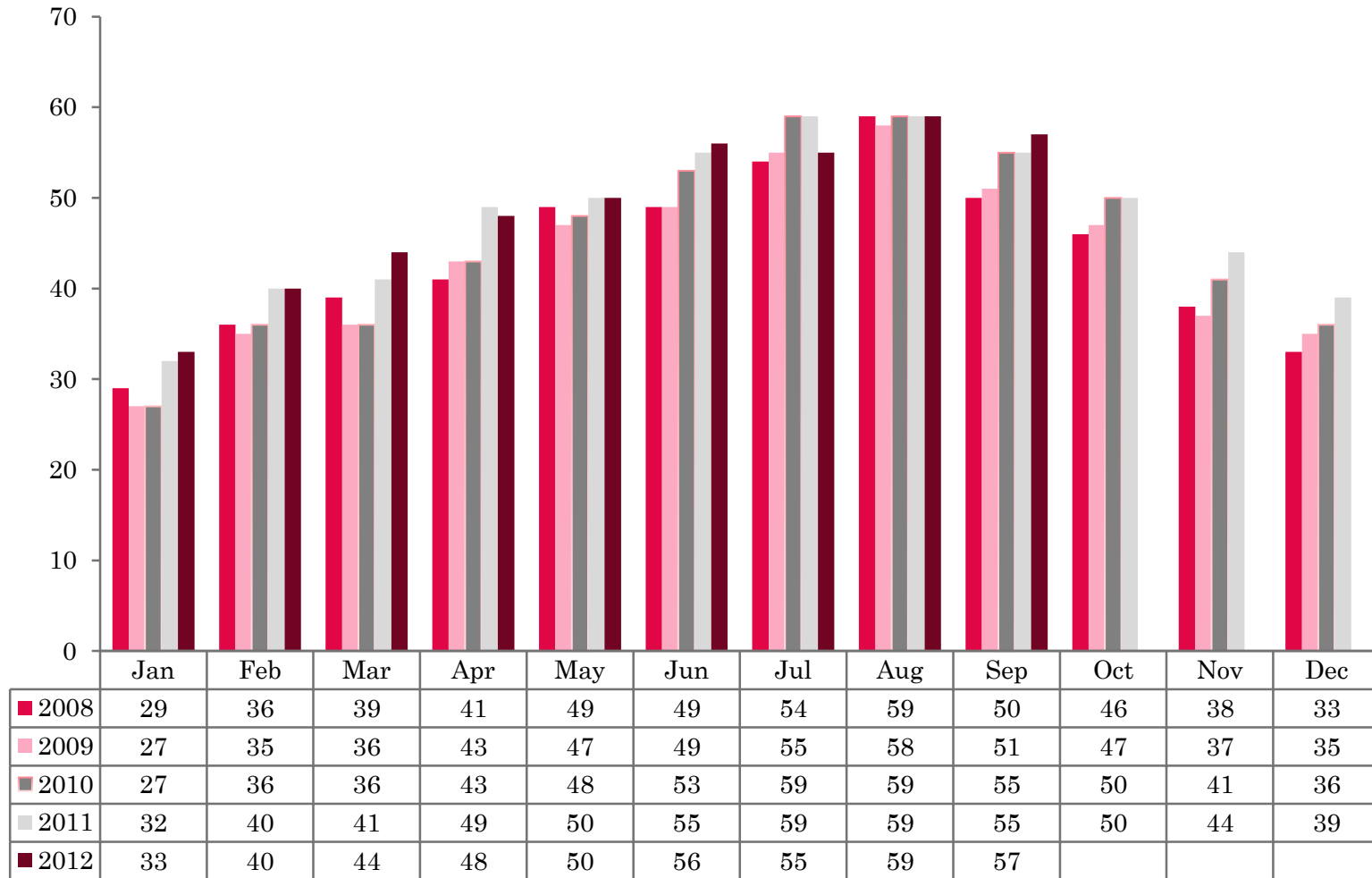
Serviced Accommodation Summary Report
September 2012

UK OCCUPANCY SURVEY

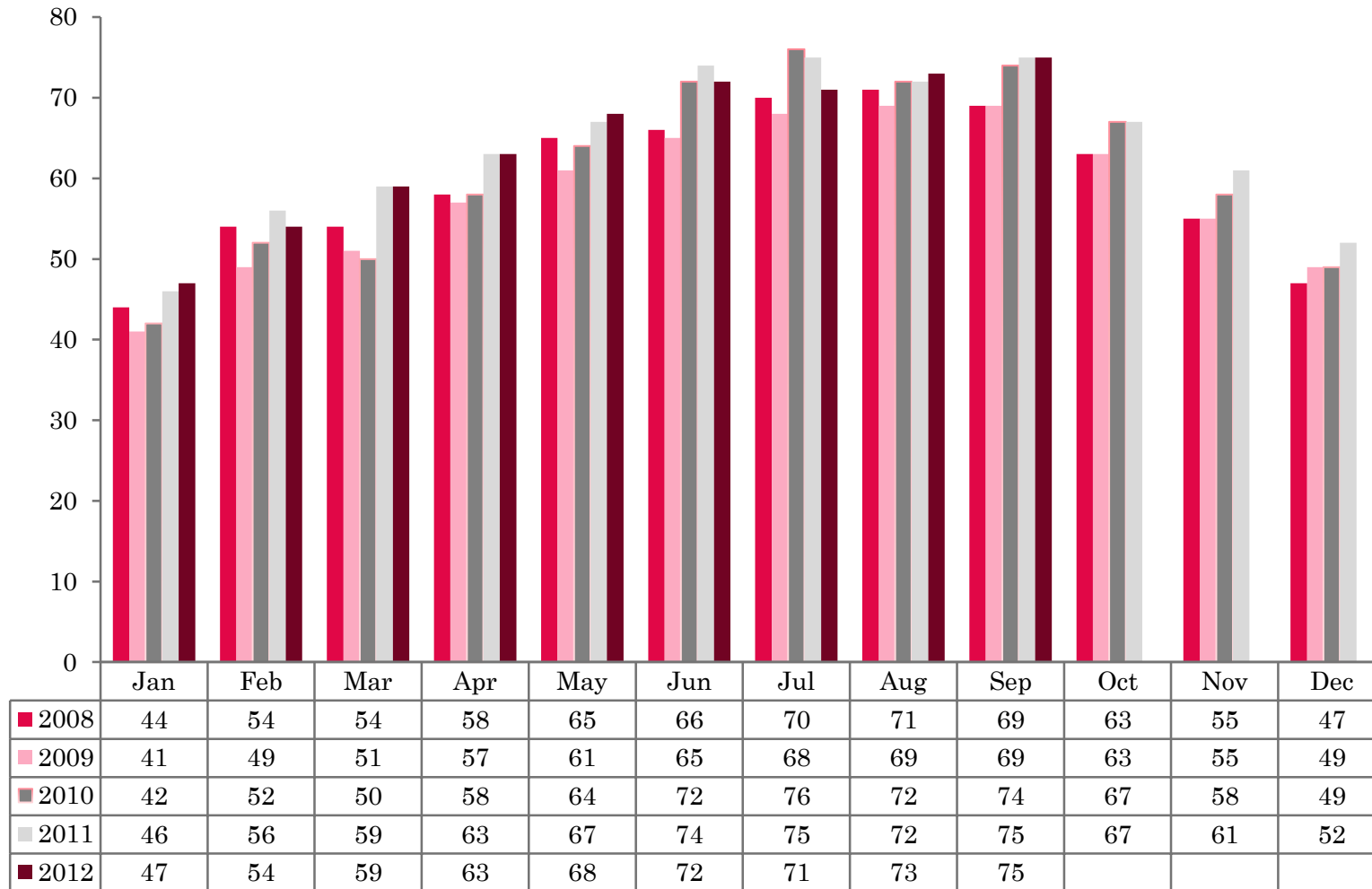
- ❖ This study has been commissioned by the National Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Government) and supported by the Department for Culture, Media and Sport.
- ❖ The results have been compiled by The Research Solution.



UK BEDSPACE OCCUPANCY 2008 - 2012



UK BEDROOM OCCUPANCY 2008 - 2012

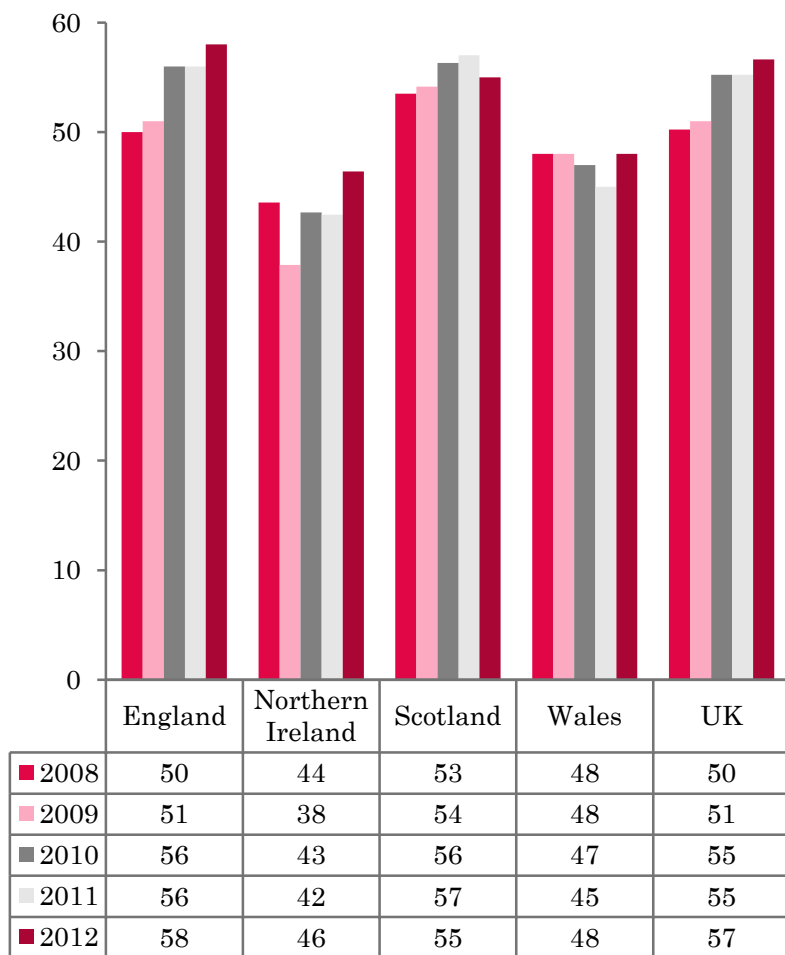


❖ 2,233 hotels, guesthouses and bed and breakfast establishments throughout the UK supplied data upon which the figures in this summary of results are based (see notes 2 and 3, on Slide 19 – sample sizes and calculation of rates).

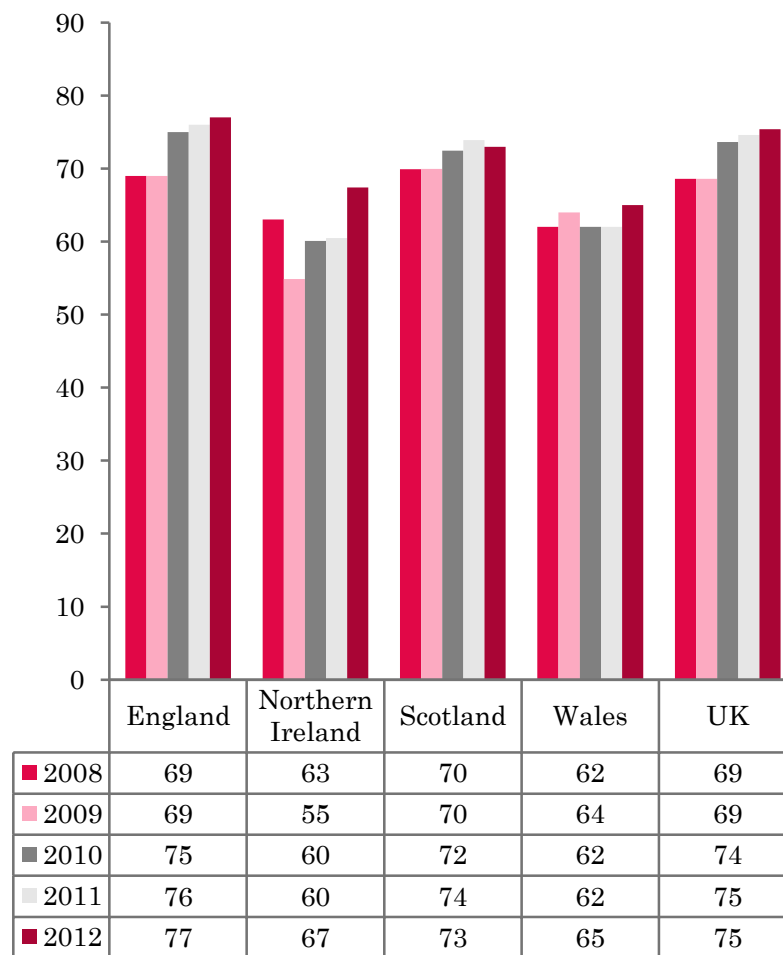
❖ UK bedspace occupancy in September (57%) had risen by 2 percentage points when compared with September 2011. UK bedroom occupancy remained static (75%) compared with the same period last year.



NATIONAL BEDSPACE OCCUPANCY SEPTEMBER 2008-2012



NATIONAL ROOM OCCUPANCY SEPTEMBER 2008-2012




- ❖ Bedspace occupancy varied from 58% in England to 46% in Northern Ireland who also saw the biggest increase in room occupancy, up 7 percentage points compared with September 2011.
 - ❖ During September 2012, bedspace in the UK saw an increase of 2 percentage points when compared with 2011, at its highest level over the last 5 years.
 - ❖ Occupancy levels in Scotland had fallen by 2 percentage points for bedspace occupancy and by 1 percentage point for room occupancy when compared with September 2011.
 - ❖ With the exception of Scotland, England, Wales and Northern Ireland had witnessed an increase in both room and bedspace occupancy (the largest increase was for Northern Ireland by 7 percentage points for room, and 4 percentage points for bedspace occupancy).
 - ❖ Bedspace occupancy by non-UK residents saw an increase in Wales compared with the previous year, with both England and Northern Ireland falling by 1 percentage point respectively. (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: September 2010 – 2012

	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	56	56	58	75	76	77	1678	1743	1591
Northern Ireland	43	42	46	60	60	67	163	170	175
Scotland	56	57	55	72	74	73	383	346	329
Wales	47	45	48	62	62	65	207	162	138
UK	55	55	57	74	75	75	2431	2421	2233

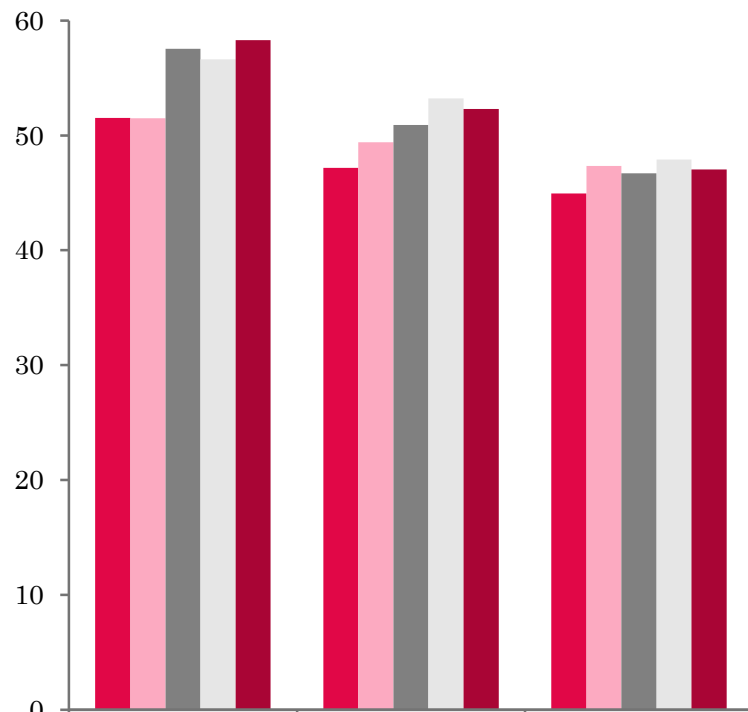
Table 2: UK/Non UK Occupancy Levels September 2010 – 2012 (see note 5a and 5b Slide 19)

	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	46	48	47	6	8	9	9	13	12	11	14	15	1678	1743	1591
Northern Ireland	25	24	23	17	18	23	33	31	36	41	43	50	163	170	175
Scotland	***	***	***	***	***	***	***	***	***	***	***	***	383	346	329
Wales	41	42	44	4	3	3	***	***	***	8	7	7	207	162	138
UK	45	47	46	6	8	9	10	13	13	11	14	15	2431	2421	2233

** FIGURES NOT AVAILABLE

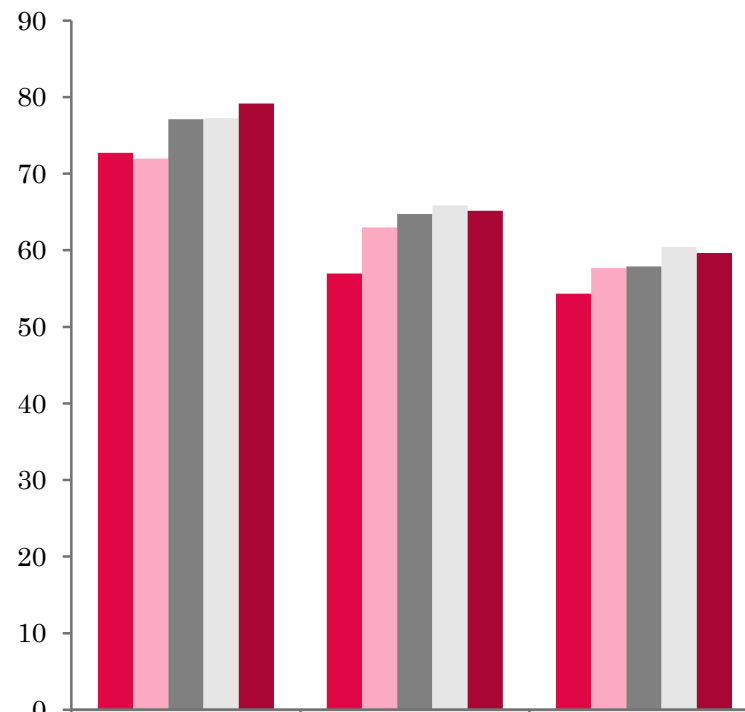


UK: BEDSPACE OCCUPANCY BY TYPE OF ACCOMMODATION SEPTEMBER 2008-2012

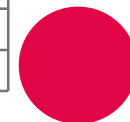


	Hotels	Guesthouses	B&Bs
2008	52	47	45
2009	51	49	47
2010	58	51	47
2011	57	53	48
2012	58	52	47

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



	Hotels	Guesthouses	B&Bs
2008	73	57	54
2009	72	63	58
2010	77	65	58
2011	77	66	60
2012	79	65	60



- ❖ 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 establishments had decreased in both measures of occupancy (1 percentage point for both room and bedspace). The B&B sector witnessed a decrease in bedspace occupancy but room levels had remained constant when compared to September 2011. (Table 3).
- ❖ With the exception of the two smaller size bands, most of the other size bandings fared better during September 2012 with increases in both room and bed occupancy levels in the 11-25, 26-50 and 51-100. The larger size band of 100+ rooms had increased by 1 percentage point for bedspace occupancy but had decreased by the same amount for room occupancy. The 1-3 size band had remained the same for both bedspace and room occupancy when compared with September 2011, whilst the 4-10 band had decreased in both measures of occupancy. (Tables 6 and 7).
- ❖ When compared with September 2011, bedspace occupancy levels in all locations had increased, with the exception of the seaside that had remained on a par with the previous year. Room occupancy levels had increased in all locations. City/large towns fared the best with the biggest increase in both bedspace and room occupancy (by 3 and 2 percentage points respectively). (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 September 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: September 2010 - 2012

HOTELS	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	58	57	59	78	78	80	938	1056	995
Northern Ireland	47	47	52	66	68	76	74	68	63
Scotland	59	59	58	77	78	79	235	230	223
Wales	52	49	53	69	68	71	114	82	70
UK	58	57	58	77	77	79	1361	1436	1351
GUESTHOUSES	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	52	55	54	66	68	67	289	261	233
Northern Ireland	30	24	44	41	37	59	17	15	17
Scotland	52	55	52	66	66	64	64	54	46
Wales	41	36	37	53	47	49	37	31	26
UK	51	53	52	65	66	65	407	361	322
B&B's	Bedspace Occupancy %			Room Occupancy %			Sample Size		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
England	48	49	49	60	62	63	451	426	363
Northern Ireland	28	29	26	38	37	35	72	87	95
Scotland	47	49	47	54	61	55	84	62	60
Wales	35	36	32	44	45	40	56	49	42
UK	47	48	47	58	60	60	663	624	560



Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels: September 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	60	59	61	53	54	55	72	72	73	77	79	80
Northern Ireland	48	47	50	37	36	42	61	60	66	57	56	66
Scotland	61	61	57	53	54	54	71	73	70	72	75	75
Wales	53	49	51	43	42	45	64	61	64	61	62	66
UK	59	58	59	52	53	54	71	71	72	75	77	78



Table 5: Non-UK Percentages: September 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	7	11	10	11	16	15	10	13	14	12	15	17
Northern Ireland	31	29	33	39	41	43	38	45	53	43	52	60
Scotland	**	**	**	**	**	**	**	**	**	**	**	**
Wales	**	**	**	**	**	**	8	9	10	12	11	10
UK	8	11	11	12	17	16	10	13	14	12	15	17

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Table 6: Occupancy Levels by Size: September 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	44	43	44	241	51	52	50	337	54	54	56	125
Northern Ireland	20	17	17	80	38	37	44	21	35	34	36	30
Scotland	42	45	44	52	56	56	52	68	53	58	60	50
Wales	33	36	29	36	43	40	44	42	51	48	46	22
UK	43	42	42	409	51	51	50	468	53	54	56	227

Table6: Occupancy Levels by Size: September 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	63	56	63	76	62	59	64	44	56	57	58	768
Northern Ireland	42	34	38	16	41	45	49	20	56	54	61	8
Scotland	57	60	58	55	64	61	61	48	61	60	57	56
Wales	48	49	54	20	55	47	54	11	62	49	55	7
UK	61	56	61	167	61	58	63	123	57	57	58	839

Table 7: Occupancy Levels by Size: September 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	54	53	54	241	63	65	62	337	68	69	70	125
Northern Ireland	28	24	24	80	49	47	55	21	52	50	54	30
Scotland	50	57	50	52	68	67	66	68	67	70	74	50
Wales	42	42	37	36	55	51	54	42	65	64	63	22
UK	52	52	52	375	63	64	62	468	67	69	70	227

Table 7: Occupancy Levels by Size: September 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	79	73	79	76	80	80	82	44	81	83	82	768
Northern Ireland	59	62	67	16	66	66	73	20	73	74	86	8
Scotland	74	76	75	55	83	81	82	48	86	86	85	56
Wales	66	65	72	20	78	70	80	11	80	72	76	7
UK	77	73	78	167	80	79	82	123	81	83	82	839



Table 8: Occupancy Levels by Location: September 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	59	57	57	228	60	59	62	593	49	50	52	342	53	53	56	428
Northern Ireland	41	43	46	42	47	47	52	54	39	36	34	47	34	22	24	32
Scotland	57	62	57	44	60	59	59	123	50	53	49	71	53	53	53	91
Wales	55	52	54	33	49	43	50	17	45	42	46	20	43	43	43	68
UK	58	57	57	347	59	58	61	787	49	50	51	480	52	52	54	619

Table 8: Occupancy Levels by Location: September 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	73	70	73	228	81	80	82	593	70	72	74	342	68	69	70	428
Northern Ireland	55	57	64	42	66	68	77	54	54	47	46	47	47	35	38	32
Scotland	69	75	68	44	81	82	83	123	67	67	66	71	65	66	65	91
Wales	70	66	68	33	72	67	72	17	64	67	71	20	54	53	54	68
UK	72	70	72	347	80	79	81	787	69	71	72	480	66	67	68	619

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	**	**	**	**	37	38	43	43	47	44	41	167
Northern Ireland	**	**	**	**	29	28	26	33	25	27	34	46
Scotland	**	**	**	**	47	41	37	21	48	50	46	72
Wales	**	**	**	**	30	24	23	12	36	37	35	42
UK	**	**	**	**	38	37	40	109	46	44	41	327

Table 9: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	52	55	57	182	68	58	56	88	57	57	59	1082
Northern Ireland	36	35	38	33	35	44	33	18	49	48	53	44
Scotland	56	58	55	32	55	58	55	36	61	60	60	168
Wales	44	47	47	20	57	56	59	15	54	48	54	49
UK	52	55	56	267	65	58	56	157	57	57	59	1343

** FIGURES NOT AVAILABLE

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	**	**	**	**	46	49	53	43	59	57	55	167
Northern Ireland	**	**	**	**	38	38	30	33	34	35	46	46
Scotland	**	**	**	**	54	52	45	21	67	64	63	72
Wales	**	**	**	**	36	33	34	12	48	47	47	42
UK	**	**	**	**	46	48	50	109	59	57	55	327

Table 10: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast) September 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	64	67	69	182	79	73	69	88	78	79	80	1082
Northern Ireland	53	53	55	33	52	56	50	18	68	69	79	44
Scotland	70	72	68	32	67	75	73	36	79	80	80	168
Wales	60	63	58	20	70	69	70	15	71	62	73	49
UK	64	67	68	267	77	73	69	157	77	78	79	1343

** 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)

