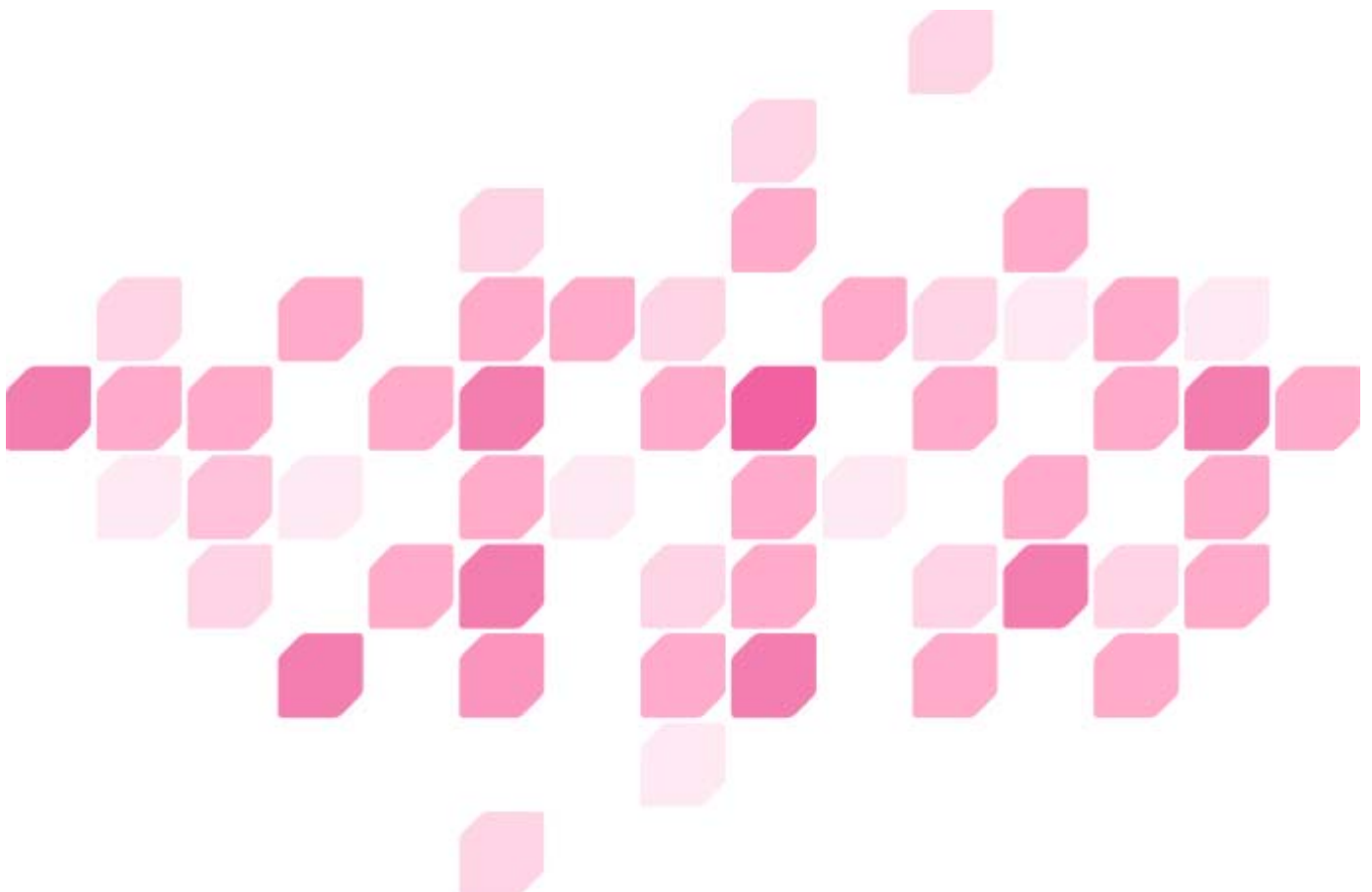




UK Occupancy Survey for Serviced Accommodation

Annual Summary 2007

JN:159386



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Introduction

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2007 which is jointly commissioned by the four statutory tourism organisations of the UK.

The report was written by Sue Tait on behalf of TNS Travel and Tourism.

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1. Main Five Year Trends

1.1 Introduction

This report summarises the main trends apparent from the individual surveys carried out in England, Scotland, Wales and Northern Ireland during the period 2003 – 2007 which have been aggregated to provide occupancy figures for the UK as a whole. In addition to this summary, fuller separate reports for Scotland, Wales and Northern Ireland are available (see page 15). Each of these national tourism organisations holds its own data from which this report was compiled, together with further details about occupancy according to the size and tariff of the establishments and average length of stay. 2007 saw a change in contractor for the collection of data for England with BDRC Ltd being appointed by VisitBritain to fulfil this role. This resulted in some changes in the methodology of the England survey (for further details see section 2.3).



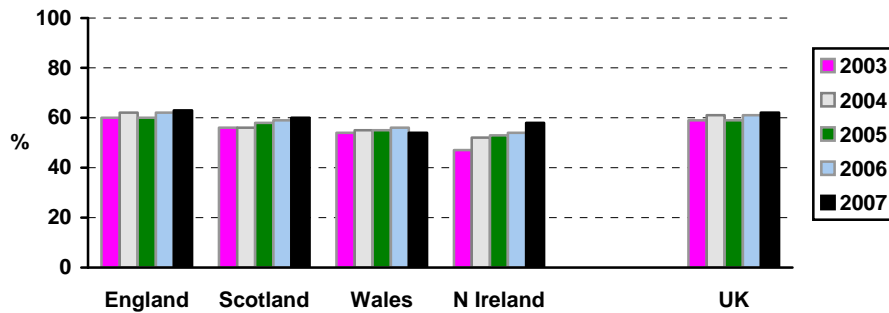
After two years of recovering confidence in the travel industry following the adverse effects of the terrorist events in the UK in July 2005, UK-wide results were mixed in 2007. Figures in England reflected those of the UK as a whole, starting the year strongly in January, fluctuating around the 2006 levels between February and November (with results for bedspace occupancy performing better than those for bedroom occupancy), but falling sharply in December. Occupancy levels in Scotland were encouraging, with most months showing a rise in occupancy (both bedroom and bedspace) when compared with 2006. The same was true in Northern Ireland, where appreciable gains were made (especially in bedroom occupancy during the period May to October – possibly reflecting an upsurge in business use). In Wales however, figures were disappointing with figures for both measures of occupancy falling in most months of the year.

1.2 Bedroom occupancy

The 2007 UK annual average of 62% was one percentage point higher than in 2006. When compared with 2006, the annual average increased in England (by 1 percentage point),

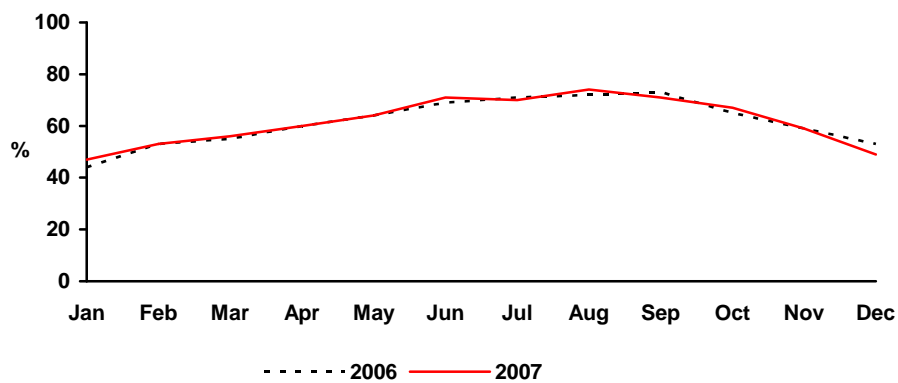
Scotland (also by 1 percentage point) and Northern Ireland (by 4 percentage points) but fell by two percentage points in Wales.

Fig. 1.1: UK and National: Annual Bedroom Occupancy 2003 – 2007



England, Scotland and Northern Ireland have all seen growth in bedroom occupancy over the period 2003-2007, with the greatest increase (11 percentage points) being in Northern Ireland. Bedroom occupancy in Wales fell back to its 2003 level in 2007 and at 54% was the lowest of the four countries – in all previous years the Northern Ireland figure had been the lowest.

Fig. 1.2: UK: Monthly Bedroom Occupancy 2006 and 2007



When compared with 2006, the UK monthly figures rose during five months (January, March, June, August and October), fell during three months (July, September and December) and remained unchanged during February, April, May and November.

When compared with four years previously (i.e. 2003), most months showed an increase in the UK bedroom occupancy figure with the greatest increases being seen in January and June (+6 percentage points in each case). Again there were differences between the four countries with the figures for England more or less reflecting those of the UK as a whole.

In Scotland, figures were consistently above those for 2003, with the increases ranging from one percentage point (in August) to five percentage points in February, March, May and June. Northern Ireland also saw increases in each month of the year, ranging from seven percentage points in both February and December to fourteen in July. Wales was the only country where occupancy figures changed little over the five years, with only four months (June, August, September and December) showing a slight increase and two months (April and July) recording a fall.

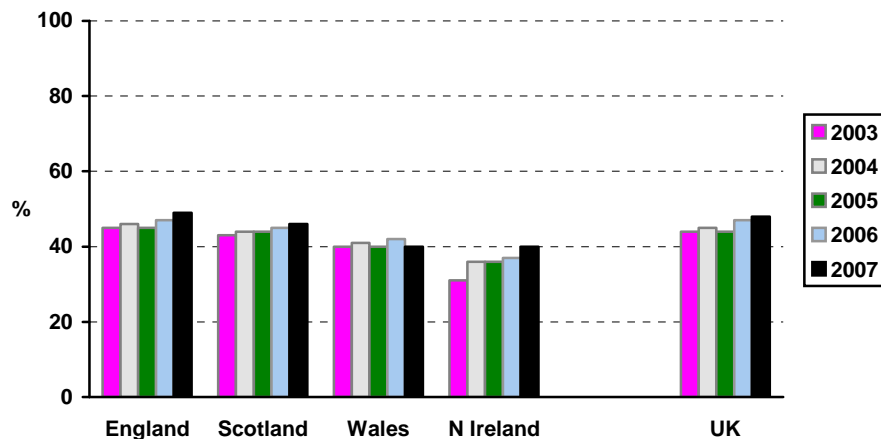
Table 1: UK and National: Bedroom Occupancy 2003 – 2007

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	03	04	05	06	07	03	04	05	06	07	03	04	05	06	07	03	04	05	06	07	03	04	05	06	07
January	43	48	45	46	50	36	34	37	39	39	35	38	38	35	35	31	37	36	39	40	41	45	43	44	47
February	54	55	54	55	54	45	44	45	49	50	44	45	46	45	44	40	45	47	48	47	52	53	52	53	53
March	53	59	56	57	57	47	47	51	49	52	47	48	50	47	47	41	46	49	51	54	52	56	55	55	56
April	57	60	59	61	61	53	49	53	58	56	54	52	54	54	52	45	55	52	56	58	56	58	58	60	60
May	62	63	63	64	64	63	63	65	65	68	60	60	61	63	60	51	56	55	58	63	62	62	63	64	64
June	65	68	67	69	72	66	70	70	71	71	61	64	64	64	63	56	60	62	63	67	65	68	67	69	71
July	69	71	68	71	71	68	72	72	71	71	66	67	66	69	64	50	59	58	57	64	69	71	69	71	70
August	69	69	66	71	73	79	78	78	79	80	69	68	69	72	70	60	62	65	66	72	70	70	68	72	74
September	71	72	70	74	71	70	71	71	73	74	65	67	67	69	66	57	62	62	65	70	71	72	70	73	71
October	65	66	64	66	69	58	58	59	60	61	56	56	56	59	56	50	55	56	54	62	64	64	63	65	67
November	60	60	59	61	62	47	49	51	50	51	47	49	46	50	47	44	46	52	49	57	57	58	57	59	59
December	51	51	50	56	51	39	41	42	43	42	40	42	40	42	41	35	38	40	39	42	49	49	48	53	49
April–Oct Average	66	67	65	68	69	65	66	67	68	69	62	62	62	64	62	53	58	58	60	65	65	66	65	68	68
July–Sept Average	70	71	68	72	72	72	74	74	74	75	67	67	67	70	67	56	61	61	63	68	70	71	69	72	72
Annual Average	60	62	60	62	63	56	56	58	59	60	54	55	55	56	54	47	52	53	54	58	59	61	59	61	62

1.3 Bedspace occupancy

The difference between bedroom and bedspace occupancy is explained by single occupancy of double/twin rooms or, in some cases, empty beds in family rooms. A double room occupied by one person has 100 per cent room occupancy but only 50% bedspace occupancy.

Fig. 1.3: UK and National: Annual Bedspace Occupancy 2003 – 2007



Patterns of bedspace occupancy were broadly similar to those for bedroom occupancy, with the UK annual average bedspace occupancy of 48 per cent for 2007 being four percentage points higher than in 2005 and 2003, three percentage points higher than in 2004 and one percentage point higher than in 2006.

Annual average bedspace occupancy rose over the period 2002-2007 in England, Scotland and Northern Ireland, with the greatest increase again being in Northern Ireland (9 percentage points). In Wales the average annual bedspace occupancy was the same as in 2003.

Table 2: UK and National: Bedspace Occupancy 2003 – 2007

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	03	04	05	06	07	03	04	05	06	07	03	04	05	06	07	03	04	05	06	07	03	04	05	06	07
January	29	33	31	31	35	24	24	26	28	26	22	26	24	22	21	19	22	22	25	26	28	31	29	30	33
February	38	39	38	38	40	31	31	32	34	36	30	31	31	31	31	26	30	30	32	30	37	37	36	37	39
March	37	41	41	40	42	32	34	37	34	37	33	33	35	33	33	26	30	33	34	37	36	39	40	39	41
April	43	46	44	48	49	41	43	40	45	43	42	40	39	41	40	31	39	34	41	41	42	45	43	47	47
May	47	47	47	49	51	49	50	50	50	53	47	47	45	47	47	35	38	38	40	42	47	47	47	49	51
June	49	51	51	53	58	53	56	55	55	57	46	48	48	48	49	37	40	43	45	46	49	52	51	53	57
July	54	56	54	58	60	58	61	61	60	57	52	53	53	56	51	37	45	45	44	46	54	56	54	58	59
August	58	57	54	60	65	68	67	66	67	69	59	58	58	61	59	46	48	50	51	54	59	58	56	61	65
September	54	53	52	57	56	55	55	55	57	58	49	50	51	54	51	37	42	43	45	47	53	53	52	57	56
October	48	49	48	49	51	46	45	45	45	47	40	41	40	43	41	33	37	38	36	40	47	48	47	48	50
November	41	41	41	43	45	33	33	36	37	38	33	33	31	34	32	27	29	33	30	39	39	39	40	41	43
December	38	38	38	43	40	28	30	31	32	33	29	30	29	32	29	23	26	28	27	29	36	36	36	41	38
April–Oct Average	51	51	50	53	56	53	54	53	54	55	48	48	48	50	48	37	41	42	43	45	50	51	50	53	55
July–Sept Average	55	55	53	58	60	60	61	61	61	62	53	54	54	57	54	40	45	46	47	49	56	56	54	58	60
Annual Average	45	46	45	47	49	43	44	44	45	46	40	41	40	42	40	31	36	36	37	40	44	45	44	47	48

1.4 Weekend and weekday occupancy

Fig. 1.4: UK and National: Annual Weekend Bedroom Occupancy 2003 – 2007

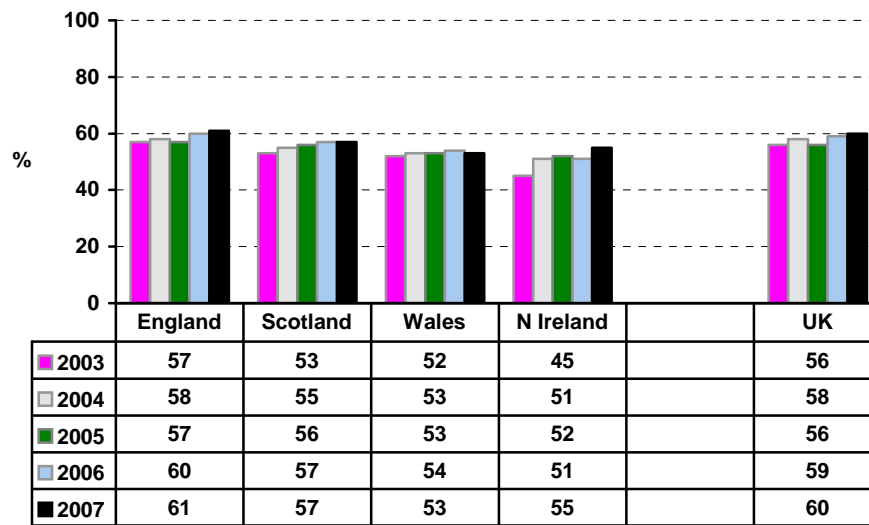
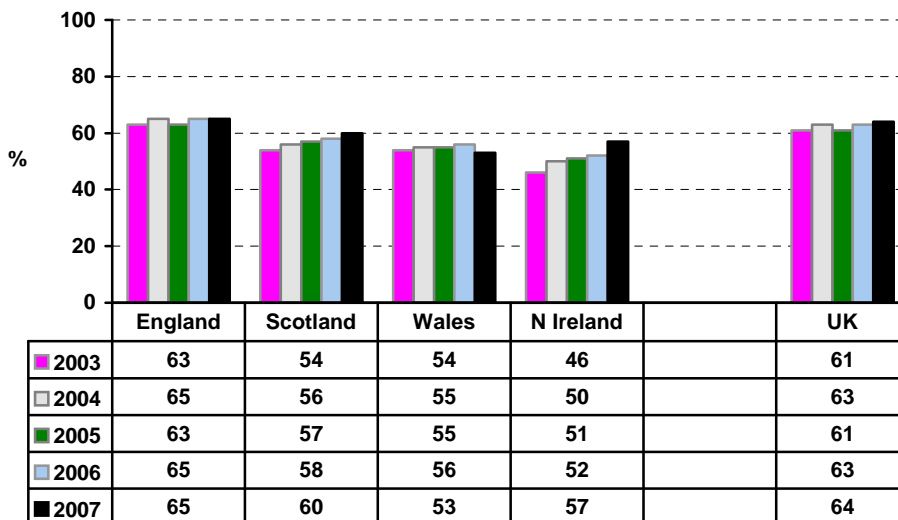


Fig. 1.5: UK and National: Annual Weekday Bedroom Occupancy 2003 – 2007



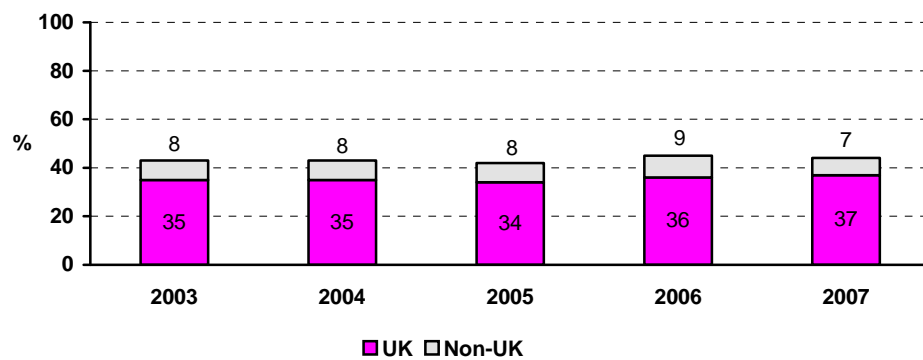
Compared with 2006, the UK annual average figures for both weekend and weekday bedroom occupancy saw a rise – in each case of one percentage point. However, these UK figures mask considerable national differences. Northern Ireland recorded increases in both weekend and weekday bedroom occupancy while the corresponding figures for Wales both fell. In England, weekend bedroom occupancy rose with the weekday figure remaining

as in 2006, while in Scotland the weekday figure rose and that for the weekend was unchanged.

As in previous years, it is also noticeable that weekday figures are higher than weekend figures – reflecting a greater influence of business (as opposed to holiday) trade.

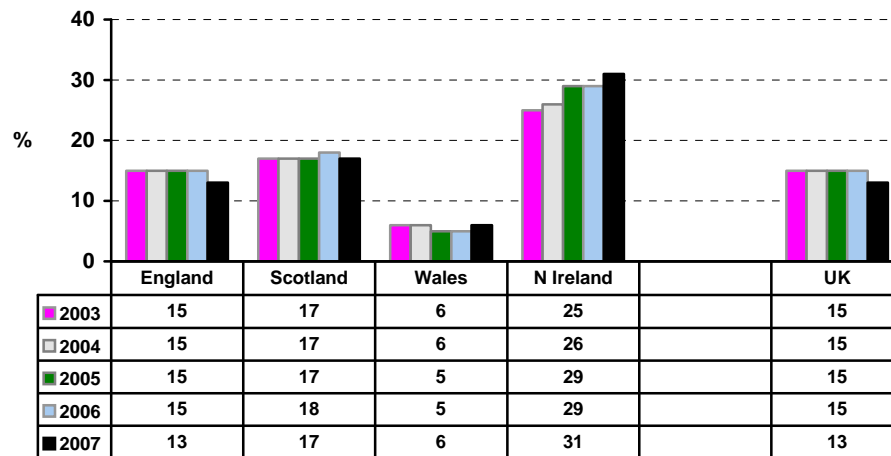
1.5 Origin of Visitors

Fig. 1.6: UK: Annual Bedspace Occupancy 2003 - 2007 by Origin of Visitors



The 2007 annual average bedspace occupancy by non-UK visitors (7%) was two percentage points lower than in 2006 and one percentage point lower than in the years 2003-2005. The annual average bedspace occupancy by UK residents (37%) was one percentage point higher than in 2006 and three percentage points higher than in 2005 and two percentage points higher than in 2004 and 2003. (These figures do not sum to the annual average bedspace occupancy figures for the UK as they are based on only those establishments able to differentiate between UK and non-UK visitors which is less than the total sample).

Fig. 1.7: UK and National: Annual Non-UK Arrivals as a Percentage of All Arrivals, 2003 - 2007



The 2007 annual average percentage of arrivals at serviced accommodation attributable to non-UK visitors was two percentage points lower than in the four previous years.

When compared with 2006, both Wales and Northern Ireland showed an increase in the percentage of non-UK arrivals, with figures for England and Scotland decreasing.

1.6 Occupancy by type of establishment

UK occupancy levels in hotels showed an increase when compared with 2006, while bed and breakfast establishments recorded a fall in both measures of occupancy. Guest houses saw a slight increase in bedspace occupancy with bedroom occupancy remaining as in 2006.

Fig. 1.8: UK: Annual Bedroom Occupancy 2003 - 2007 by Type of Establishment

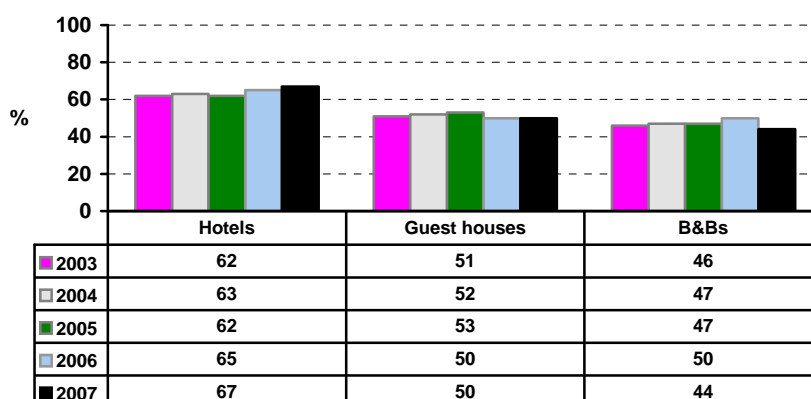
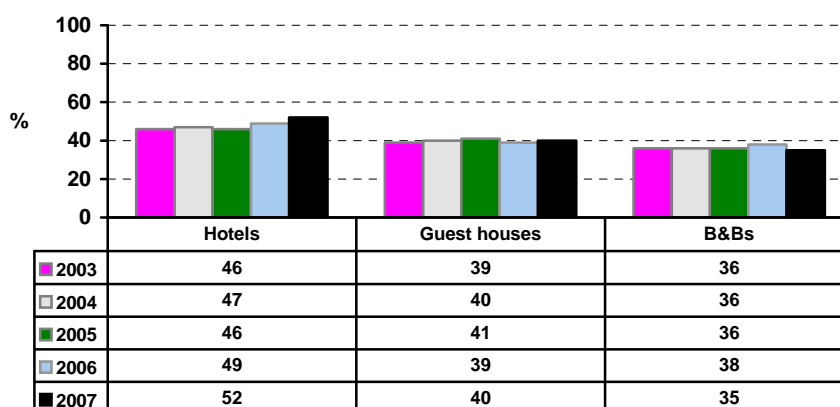


Fig. 1.9: UK: Annual Bedspace Occupancy 2003 - 2007 by Type of Establishment



Over the period 2003 to 2007, average occupancy levels in hotels increased while those in bed and breakfast establishments fell. In guest houses, bedspace occupancy increased slightly but bedroom occupancy fell (also slightly).

Fig. 1.10: National: Annual Bedroom Occupancy 2006 and 2007 by Type of Establishment

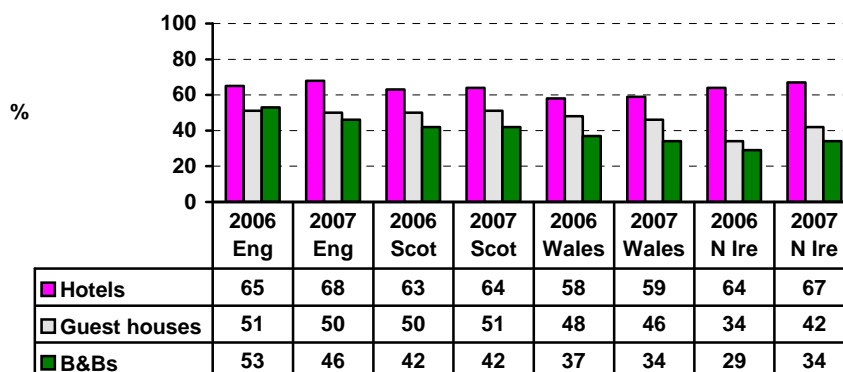
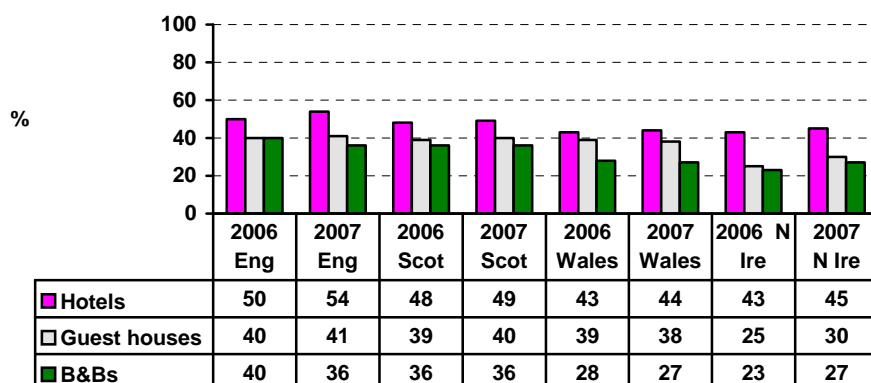


Fig. 1.11: National: Annual Bedspace Occupancy 2006 and 2007 by Type of Establishment



At a national level, when compared with 2006, occupancy levels (both bedroom and bedspace) in hotels increased in all four countries. Occupancy levels in guest houses in Scotland and Northern Ireland rose but fell in Wales. In England, bedspace occupancy in this type of accommodation rose but bedroom occupancy fell. In bed and breakfast establishments, occupancy rose in Northern Ireland, remained unchanged in Scotland and fell in England and Wales.

1.7 Occupancy by location of establishment

Fig. 1.12: UK: Annual Bedroom Occupancy 2003 - 2007 by Location of Establishment

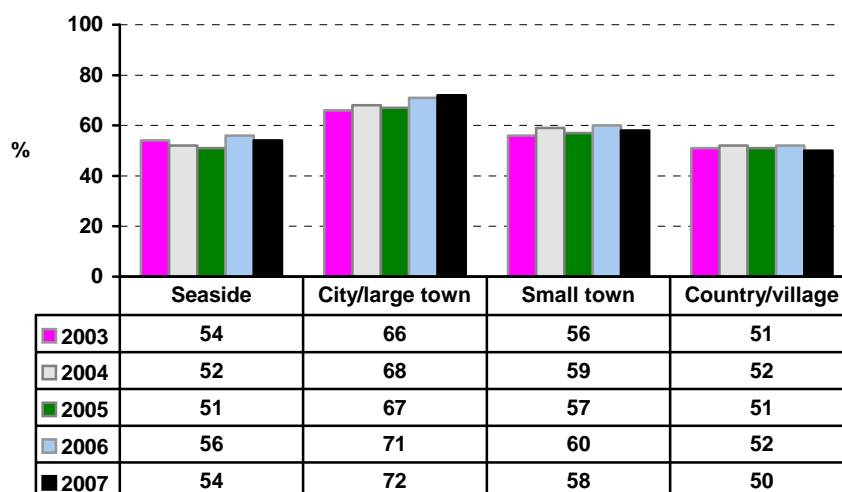
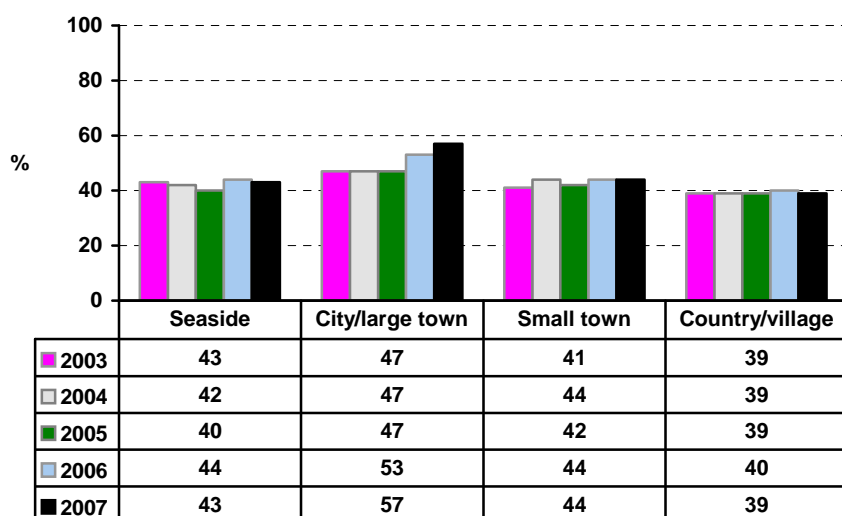


Fig. 1.13: UK: Annual Bedspace Occupancy 2003 - 2007 by Location of Establishment



When compared with 2006, only city/large town locations saw an increase in average annual occupancy levels. Figures for all other locations fell except for bedspace occupancy in small towns which remained as in 2006.

2. About the Occupancy Survey

2.1 Survey sponsors

As part of the EU Directive on Tourism Statistics adopted in November 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. Since January 1997 each of the four national tourism organisations has been responsible for the implementation of an occupancy survey of serviced accommodation in its area, carried out according to a common specification and standard, thus ensuring the production of comparable occupancy data for the whole of the UK.

TNS Travel and Tourism has been the UK Survey Co-ordinator for these surveys since 2002 and collates the results from each of the national and regional surveys, combining them to produce occupancy rates for the UK as a whole.

2.2 Coverage of survey

The types of accommodation in the survey are those defined (in the EU Directive) as tourist accommodation which is arranged in rooms and where bed-making and cleaning services are provided. The survey therefore includes hotels (including motels, lodges and inns), guesthouses and private houses offering bed and breakfast to tourists (including farmhouses). It should be noted that only in Northern Ireland, where compulsory registration of tourist accommodation ensures an accurate stock record, is there a definition of the various types of accommodation. In England, Scotland and Wales the type is defined by each accommodation establishment itself in answering a questionnaire and therefore, because the criteria are not objectively defined, the distinction between types is not always clear and may vary slightly.

In 2007 there were about 48,000 establishments of this type in the UK which were known to the tourist boards, with a total of just over 1.2 million bedspaces available nightly/daily.

Figure 2.1: Distribution of total known accommodation stock: Number of establishments

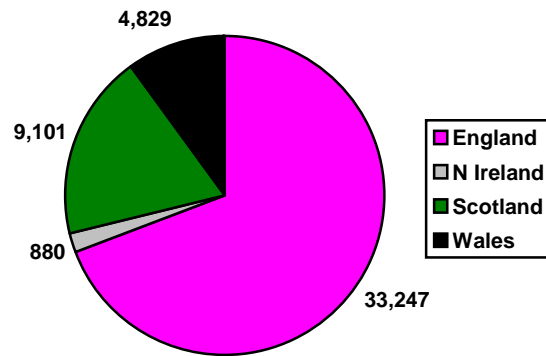
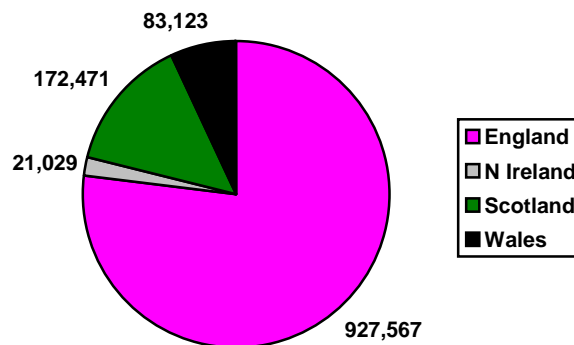


Figure 2.2: Distribution of total known accommodation stock: Number of bedspaces



2.3 Survey method

Establishments were invited to provide data for the survey on a monthly basis and each month between 1,243 and 1,777 returned data and the occupancy rates in the report are calculated from these monthly samples. It should be noted that for 2007 the target minimum sample size for Scotland, Wales and Northern Ireland remained at 200 open establishments while there was no target minimum sample size in England. Both the recruited samples (those establishments agreeing to provide data) and the analytical samples (those establishments returning monthly data) have been monitored during the year in an endeavour to ensure that the samples are as representative as possible of the known total stock.

The occupancy figures are calculated on the accommodation available each month - i.e. only open accommodation is included. In calculating figures for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area that month. Prior to 2006 the same method of calculation was used to obtain occupancy rates for England with occupancy rates for each English region being weighted using the number of bedspaces known to be available in the area. From 2006, occupancy figures for England have been calculated directly from submitted data, again being weighted by bedspaces available.

2.4 Full reports

Individual tourism organisations in Scotland, Wales and Northern Ireland produce a wide range of other, more local, information from their own surveys which is available directly from them. It should be noted that this locally-produced information may be based on slightly different samples from the UK Survey, depending upon the timing of the analysis. The following full reports are available from the national tourist boards. Where applicable, orders should be sent including remittances.

Northern Ireland:

Survey of Hotel Occupancy Annual Report 2007: *Free*; Survey of Guesthouse and Bed and Breakfast Accommodation 2007 *Free (available June)*

Both available online at www.NITB.com

or from:

Northern Ireland Tourist Board
St Anne's Court
59 North Street
Belfast BT1 1NB

Scotland:

Scottish Accommodation Occupancy Survey 2007 Final Report *Price: £20.00*

Available from:

VisitScotland
Strategic Research
Ocean Point One
94 Ocean Drive
Edinburgh EH6 6JH

or:

research@visitscotland .com

Wales:

Wales Occupancy Survey for Serviced Accommodation 2007 *Free*

Available from:

Visit Wales
Research
Brunel House
Cardiff CF24 OUY

or: tourismresearch@wales.gsi.gov.uk

