



UK Occupancy Survey

**For serviced accommodation
2001 summary of results**



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

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Published on behalf of the sponsors by the Centre for Leisure Research, University of Edinburgh, Edinburgh.
August 2002

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ISBN 086 143 288 6

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1 How much use is made of the UK's serviced accommodation?

The use made of serviced accommodation during 2001 was greatly influenced by two events.

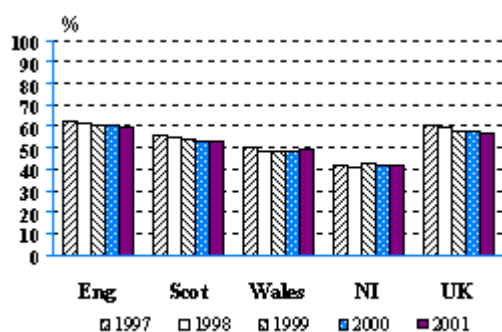
In the early part of the year (starting in late February and with the effects felt until well into the summer months), there was the outbreak of foot and mouth disease and the resulting decline in visits to the countryside. As was pointed out in the relevant monthly summaries, it is likely that the effect of this on serviced accommodation (especially small operators) was greater than that shown in the occupancy rates presented here as these are **net** rates, relating only to open establishments and are not able to take into account those establishments which closed at this time.

Just as domestic tourism was recovering at the end of the summer, there were the far-reaching events of 11 September 2001 with their inevitable repercussions on travel, both domestic and from overseas. These events greatly affected occupancy rates from September onwards, especially in London, which felt the full force of the downturn in travel.

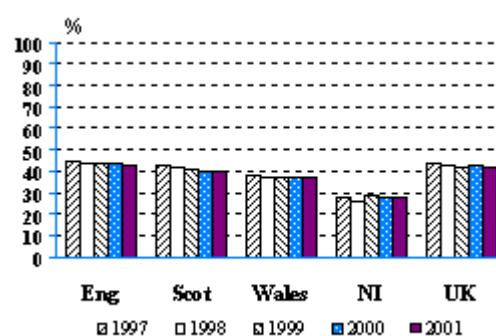
Overall, the UK annual average bedroom occupancy for serviced accommodation has fallen by three percentage points since 1997. In 2001, it was 57%, compared with 58% in 2000 and 1999, 59% in 1998 and 60% in 1997. During this period, the annual average bedspace occupancy has fallen by two percentage points. In 2001, it was 42%, compared with 43% in 2000, 42% in 1999, 43% in 1998 and 44% in 1997. These figures represent the occupancy of bedrooms and bedspaces which are available each night (ie those in open establishments only). The difference between the two measures of occupancy (bedroom occupancy and bedspace occupancy) is explained by single occupancy of twin or double rooms (one person staying in a twin room results in 100% room occupancy but only 50% bedspace occupancy).

Although a considerable number of establishments are closed for part of the year (usually the winter months), these are predominantly the smaller establishments and at least 90% of all bedspaces are available all year round.

UK and National: Annual Bedroom Occupancy 1997 - 2001 (see page 3 for data table)



UK and National: Annual Bedspace Occupancy 1997 - 2001 (see page 4 for data table)



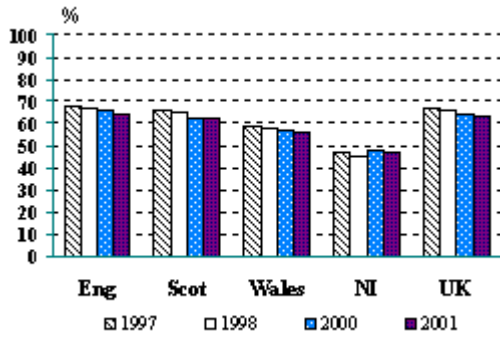
The annual average occupancy varies considerably from country to country, with England (59% room occupancy and 43% bedspace occupancy) achieving higher occupancy levels than the other countries (although showing a fall when compared with 2000). The annual averages in Scotland, Wales and Northern Ireland are lower, ranging from 53% room occupancy and 40% bedspace occupancy in Scotland to 42% room occupancy and 28% bedspace occupancy in Northern Ireland - the figures for both of these countries being the same as in 2000. In Wales, bedroom occupancy in 2001 was one percentage point higher than in 2000; bedspace occupancy was the same in 2001 as in 2000.

2 How much does it vary throughout the year?

As with the annual figures, the April to October occupancy varies between countries. Until 2000, Scotland had the highest bedspace occupancy; in 2000, the highest bedspace occupancy was in England (50%, compared with 49% in Scotland) and in 2001 the highest figure was found in England and Scotland (48%, a fall of two percentage points in England and one in Scotland). The lowest occupancy levels were again found in Northern Ireland (47% room occupancy and 32% bedspace occupancy, both representing a fall of one percentage point compared with 2000).

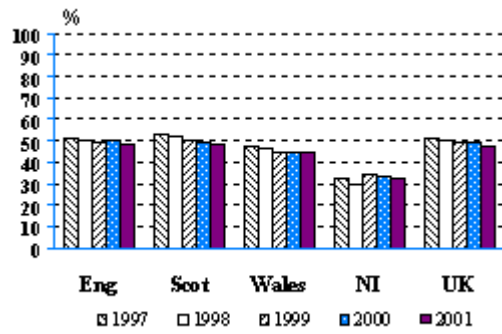
UK and National: April-October Room Occupancy 1997 - 2001

(see page 3 for data table)



UK and National: April-October Bedspace Occupancy 1997 - 2001

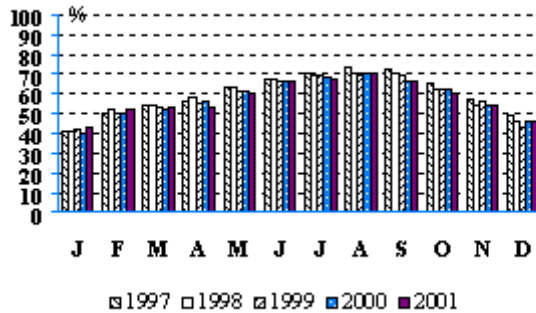
(see page 4 for data table)



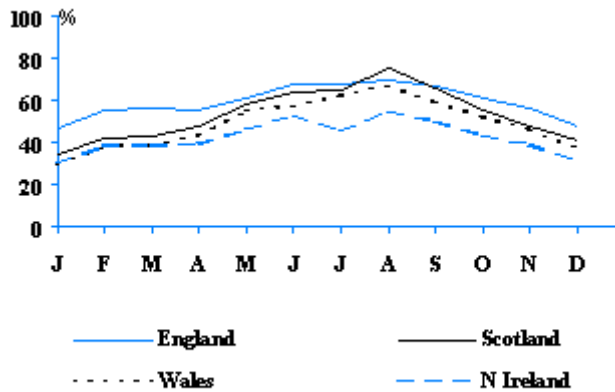
Over the year as a whole, 2001 occupancy levels showed a similar pattern to those of previous years. Occupancy levels in January and February were either the same as in 2000 or higher. Figures for March to July show the adverse effect of the outbreak of foot and mouth disease when the occupancy levels were lower than in 2000. Occupancy rates recovered to their 2000 level in August, but were affected by the events of 11 September from that month onwards.

UK bedroom occupancy ranged from 43% in January to 70% in August.

UK: Monthly Bedroom Occupancy 1997 - 2001



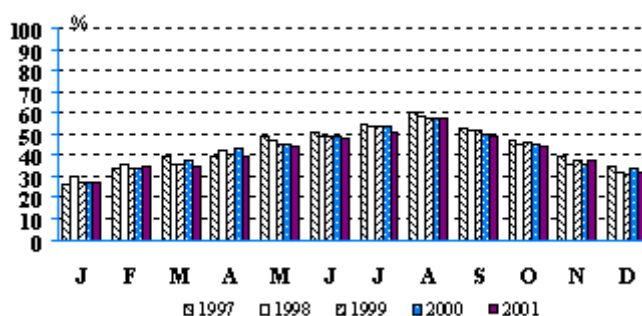
National: Monthly Bedroom Occupancy 2001



UK and National: Bedroom Occupancy (%) 1997 - 2001																									
	England					Scotland					Wales					N Ireland					UK				
	97	98	99	00	01	97	98	99	00	01	97	98	99	00	01	97	98	99	00	01	97	98	99	00	01
January	43	48	45	43	47	36	35	33	31	34	26	28	26	27	29	29	31	30	28	30	41	44	42	40	43
February	53	55	53	53	55	42	41	43	41	42	37	37	33	38	38	36	39	35	36	38	50	52	50	50	52
March	56	57	56	55	56	46	46	47	44	43	43	38	39	40	38	38	38	37	37	38	54	54	53	52	53
April	58	60	58	59	55	49	51	50	50	48	46	48	46	48	43	39	40	41	45	39	56	58	55	56	53
May	64	64	62	62	61	62	63	60	59	58	56	56	54	53	55	45	46	47	50	46	63	63	61	61	60
June	68	68	66	67	68	70	69	68	65	64	59	59	58	57	57	49	45	52	52	53	67	67	66	66	66
July	71	71	70	70	68	72	69	69	67	65	66	63	64	64	62	40	43	48	46	45	71	69	69	68	67
August	72	70	69	70	70	79	77	75	75	75	71	68	68	68	67	55	52	54	52	55	73	71	69	70	70
September	73	73	71	68	67	72	68	68	63	66	62	62	62	58	59	53	49	54	51	50	72	71	69	66	66
October	67	65	65	64	61	59	56	55	56	55	53	49	51	50	52	47	42	46	41	43	65	62	62	62	60
November	60	57	60	57	56	47	46	45	45	48	42	37	41	40	46	42	38	42	38	39	57	54	56	54	54
December	51	49	46	49	48	38	36	33	37	41	35	32	34	36	37	33	29	30	31	31	49	46	43	46	46
April-Oct ave	68	67	66	66	64	66	65	64	62	62	59	58	58	57	56	47	45	49	48	47	67	66	65	64	63
July-Sept ave	72	71	70	69	68	74	71	71	68	69	66	64	65	63	63	49	48	52	50	50	72	70	69	68	68
Annual ave	62	61	60	60	59	56	55	54	53	53	50	48	48	48	49	42	41	43	42	42	60	59	58	58	57

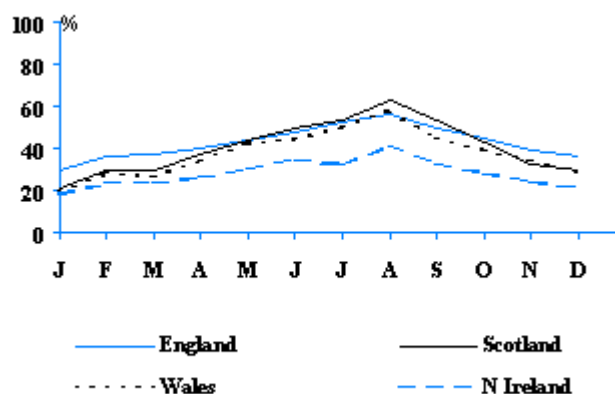
In each of the four countries, the peak figure was achieved in August (70% in England; 75% in Scotland, 67% in Wales and 55% in Northern Ireland - the same as in 2000 in England and Scotland, a decrease of one percentage point in Wales and an increase of three percentage points in Northern Ireland). In all four countries, the lowest room occupancy was found in January (ranging from 47% in England to 29% in Wales - both figures representing an increase (four and two percentage points) when compared with 2000).

UK: Monthly Bedspace Occupancy 1997 – 2001



The patterns for bedspace occupancy were similar to those for bedroom occupancy, though at lower levels. UK bedspace occupancy levels ranged from 27% in January to 57% in August.

National: Bedspace Occupancy 2001



The bedspace occupancy for England reached a peak of 56% in August (57% in 2000; 56% in 1999; 57% in 1998; 59% in 1997) and a low point of 29% in January (the same value in 2000 and 1999; 32% in 1998; 28% in 1997).

The corresponding figures for Scotland and Wales showed greater variation throughout the year, with Scotland's peak bedspace occupancy (63% in August) being six percentage points above the UK average. The figures for Northern Ireland were again consistently below those of the other countries, with a peak of only 41% (38% in 2000).

UK and National: Bedspace Occupancy (%) 1997 - 2001																									
	England					Scotland					Wales					N Ireland					UK				
	97	98	99	00	01	97	98	99	00	01	97	98	99	00	01	97	98	99	00	01	97	98	99	00	01
January	28	32	29	29	29	24	23	21	21	21	17	19	18	18	19	18	18	17	17	18	26	30	27	27	27
February	36	38	36	36	36	28	29	29	28	30	26	28	24	26	28	22	24	21	23	23	34	36	34	34	35
March	41	38	37	39	37	32	31	32	30	30	33	27	28	28	26	26	22	24	23	23	39	36	36	37	35
April	41	44	41	44	40	34	38	36	40	37	34	37	35	38	34	25	26	28	32	26	39	42	40	43	39
May	49	47	45	46	44	49	49	45	44	44	45	45	41	41	42	31	29	32	33	30	49	47	45	45	44
June	51	49	49	50	48	56	54	52	51	50	46	45	45	44	44	33	29	35	34	32	51	49	49	49	48
July	54	54	54	54	52	60	57	58	56	53	54	51	51	52	50	30	31	35	33	35	55	54	54	54	51
August	59	57	56	57	56	69	66	63	62	63	62	58	58	58	58	40	38	40	38	41	60	58	57	57	57
September	54	53	52	51	50	57	54	53	50	53	47	47	47	45	45	35	32	36	33	33	53	52	52	50	49
October	49	47	47	47	45	43	42	42	41	43	39	36	38	37	39	30	27	30	26	28	47	45	46	45	44
November	41	38	41	39	39	32	32	30	30	32	30	26	29	28	34	25	23	26	22	24	39	36	38	36	37
December	37	35	33	36	36	26	27	25	27	29	26	23	25	26	28	21	19	19	20	21	35	32	31	34	32
April-Oct ave	51	50	49	50	48	53	52	50	49	48	47	46	45	45	45	32	30	34	33	32	51	50	49	49	47
July-Sept ave	56	55	54	54	53	62	59	58	56	56	54	52	52	52	51	35	34	37	35	35	56	55	54	54	52
Annual ave	45	44	44	44	43	43	42	41	40	40	38	37	37	37	37	28	26	29	28	28	44	43	42	43	42

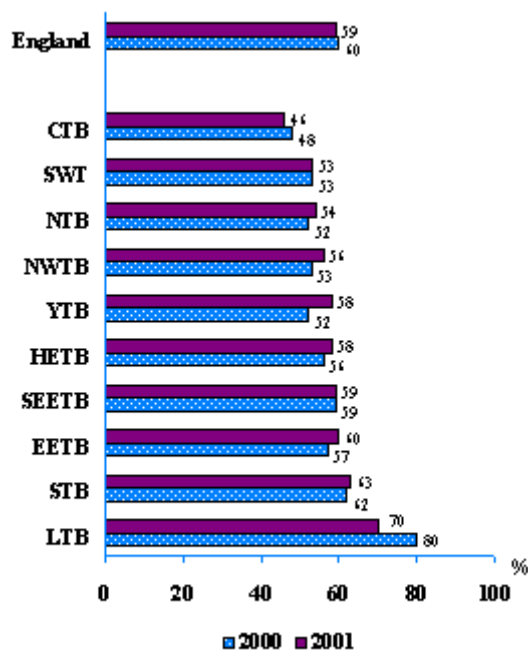
3 What are the differences between the English regions?

The English regional tourist board (RTB) areas are defined in Section 9.

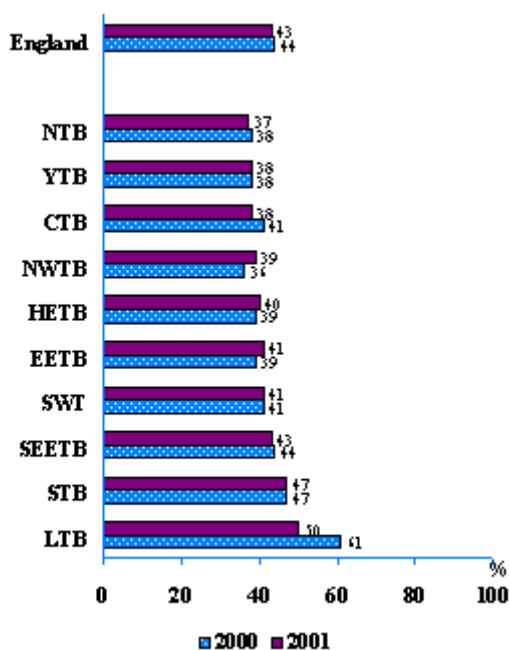
Although annual occupancy figures in London (70% bedroom and 50% bedspace) were again higher than in other regions, they showed a considerable fall when compared with 2000 (of ten percentage points for bedroom occupancy and nine for bedspace). The difference between London and the next highest region (Southern) was very much smaller than previously - only seven percentage points for bedroom occupancy and three for bedspace (compared with a difference 18 and 14 percentage points respectively in 2000).

As in previous years, the southern regions (Southern and South East England Tourist Boards) showed the highest usage after London. The lowest annual bedroom occupancy was to be found in Cumbria and the lowest annual bedspace occupancy in Northumbria (along with the South West these were the areas most badly affected by the outbreak of foot and mouth disease).

England and RTBs: Annual Room Occupancy 2000 and 2001

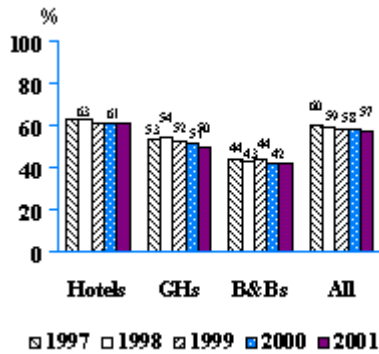


England and RTBs: Annual Bedspace Occupancy 2000 and 2001

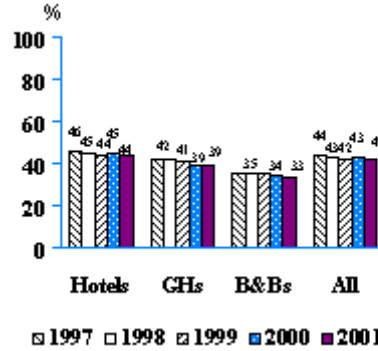


4 What about the different types of accommodation?

UK: Annual Room Occupancy by Type of Establishment 1997 - 2001

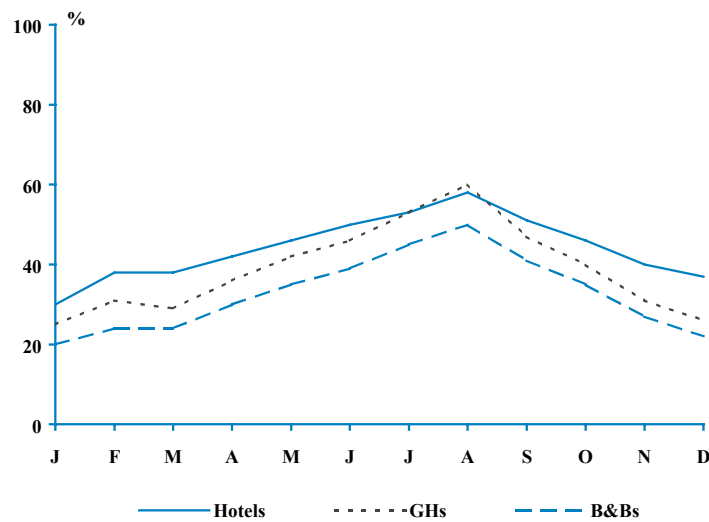


UK: Annual Bedspace Occupancy by Type of Establishment 1997 - 2001



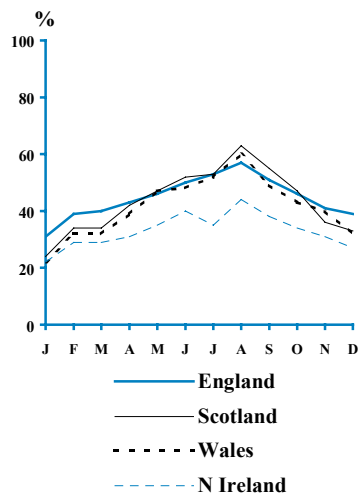
Occupancy patterns in 2001 were similar to those of previous years. Hotels had the highest annual average occupancy – 61% bedroom occupancy (the same as the previous two years) and 44% bedspace occupancy (45% in 2000). Occupancy in guesthouses and bed and breakfast establishments was lower with the bedroom occupancy being 50 and 42% respectively (one percentage point lower than in 2000 for guesthouses but the same for bed and breakfast establishments). Bedspace occupancy levels for these types of accommodation were nearer to room occupancy than those for hotels, indicating less single occupancy of double/twin rooms.

UK: Monthly Bedspace Occupancy 2001 by Type of Establishment

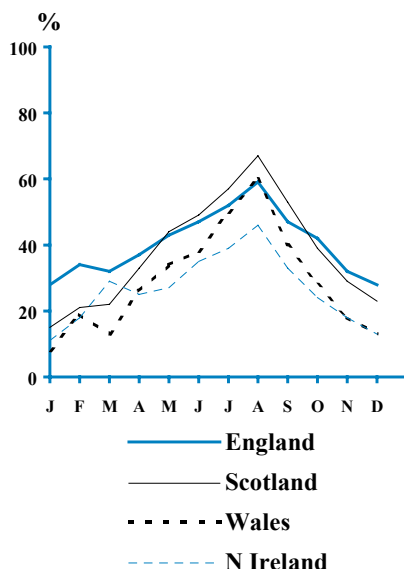


All types of establishment showed a similar pattern of occupancy during most of the year although the range throughout the year was greater for guesthouses and bed and breakfast establishments.

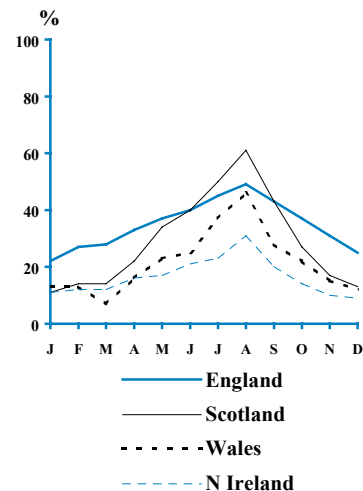
National: Monthly Bedspace Occupancy 2001 for Hotels



National: Monthly Bedspace Occupancy 2001 for Guesthouses



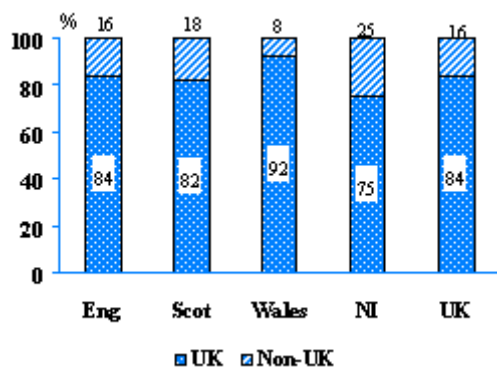
National: Monthly Bedspace Occupancy 2001 for Bed & Breakfast Establishments



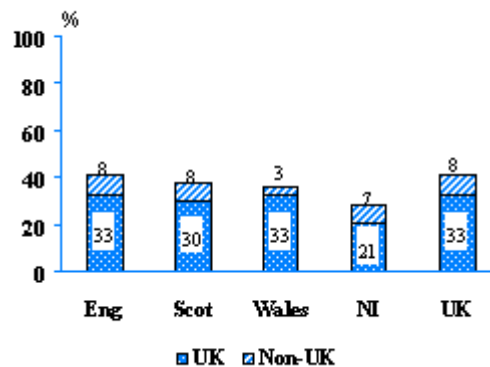
There were also national differences between the use of the different types of accommodation, although to a large extent these mirrored the differences noted in the annual averages for all types of accommodation (see Section 1). The values for Northern Ireland for all types of accommodation were consistently lower than those for the other countries, while the summer values for Scotland for all types of accommodation were above those of the other countries.

5 Where do visitors come from?

UK and National: Origin of Visitors 2001



UK and National: Annual Bedspace Occupancy 2001 by Origin of Visitors

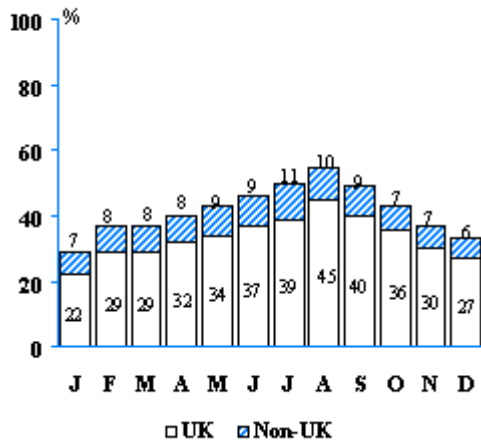


On average, in the UK as a whole, just under one in six arrivals at serviced accommodation (16% in 2001, compared with 17% in 2000, 19% in 1999 and 18% in both 1998 and 1997) came from outside the UK, accounting for a similar proportion of the bednights.

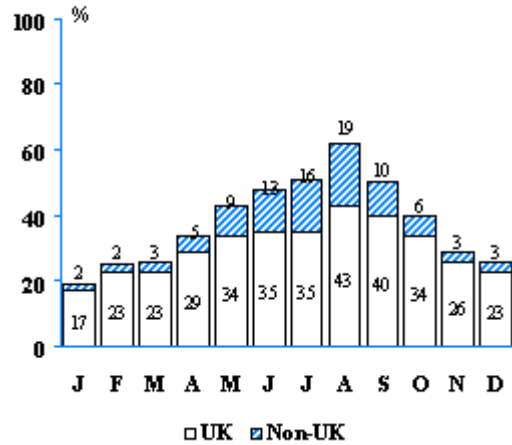
As in the previous two years, the figures for England and Scotland were similar, but those for Wales and Northern Ireland exhibited marked differences. In Wales, only eight per cent of arrivals at serviced accommodation were from outside the UK, while in Northern Ireland, a much greater proportion (25%) were from outside the UK - a high proportion of whom would have been from the Republic of Ireland.

Over the year, eight per cent of the bedspaces in the UK were occupied by visitors to the UK - one percentage point less than in previous years. In Wales, it is noticeable that bedspace occupancy by visitors from outside the UK (only three per cent) was again very much below the level in the other three countries.

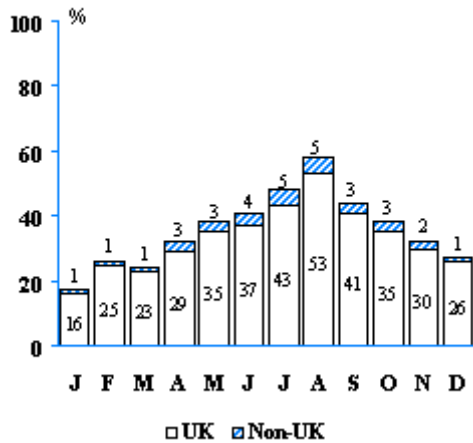
England: Monthly Bedspace Occupancy 2001



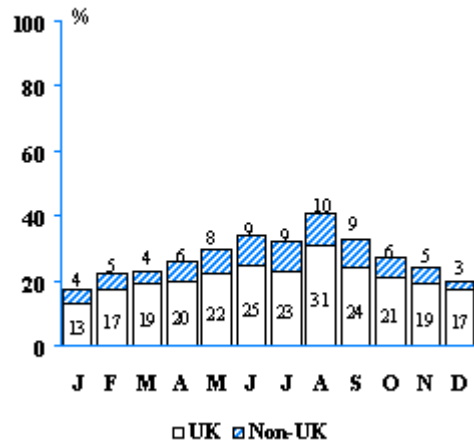
Scotland: Monthly Bedspace Occupancy 2001



Wales: Monthly Bedspace Occupancy 2001



N. Ireland: Monthly Bedspace Occupancy 2001

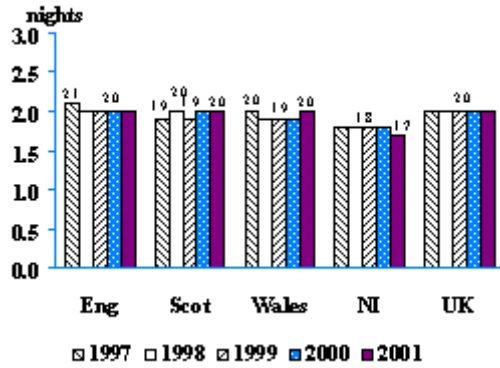


All countries showed a similar monthly pattern, with bedspace occupancy by visitors to the UK increasing to some extent during the summer months. In absolute terms, England, Wales and Northern Ireland showed a similar yearly range of non-UK bedspace occupancy with between four and six percentage points difference between the winter and summer figures.

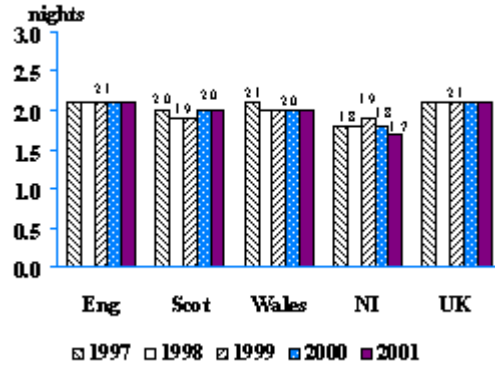
In Scotland, however, as in previous years, there was considerably greater variation throughout the year with the summer figure reaching a peak of 19% in August, compared with a winter figure of only two per cent. During the summer months, non-UK visitors to Scotland accounted for almost one in three bednights, compared with only one in five in England, demonstrating Scotland's greater dependency on inbound tourism during the peak summer months.

6 How long do people stay in one establishment?

UK and National Annual Average Length of Stay 1997 – 2001

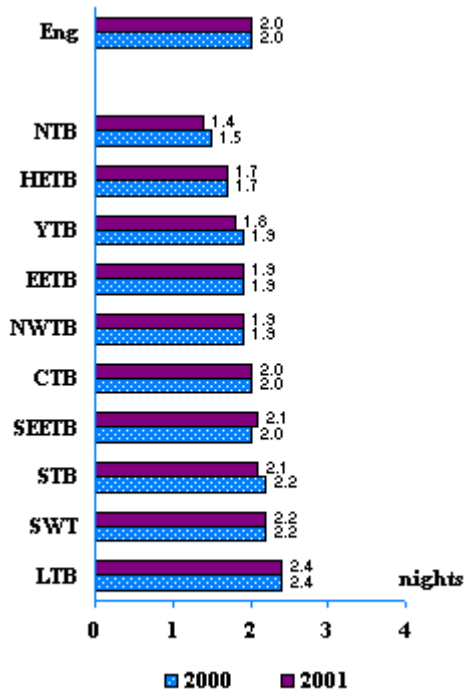


UK and National: April-October Average Length of Stay 1997 - 2001

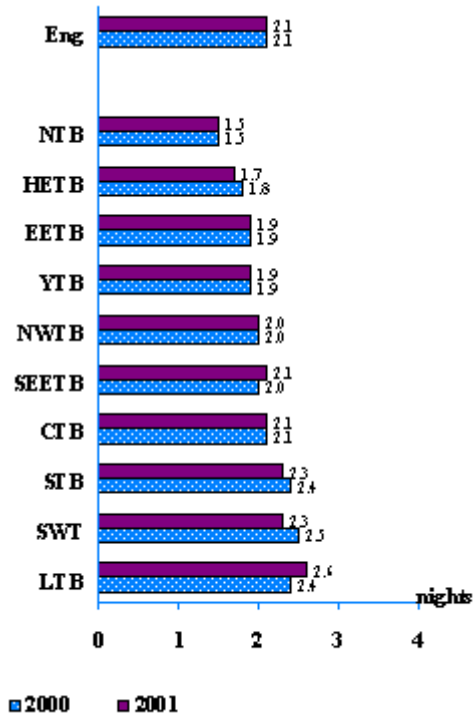


As in previous years, on average throughout the year, visitors stayed for two nights during a visit to any one establishment. This rose slightly to 2.1 nights during April - October. Averages were again noticeably lower in Northern Ireland.

England and RTBs: Annual Average Length of Stay, 2000 and 2001



England and RTBs: April-October Average Length of Stay, 2000 and 2001



London experienced the longest annual average length of stay (2.4 nights) and the longest April - October average length of stay (2.6 nights). Northumbria had the shortest average length of stay (1.4 nights for the annual average and 1.5 nights for the April - October average).

7 About the UK Occupancy Survey for Serviced Accommodation

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 (ie serviced accommodation) to Eurostat, the statistical office of the European Community. The Department for Culture, Media and Sport (DCMS) worked with the four National Tourist Boards to develop and extend existing occupancy surveys to provide the necessary data. Since January 1997, each of the boards 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. In England, this task is further devolved to the ten RTBs.

The Centre for Leisure Research was appointed as UK Survey Coordinator, with responsibility for collating figures supplied by the English RTBs and the National Tourist Boards of Northern Ireland, Scotland and Wales and calculating the required occupancy rates for the UK as a whole. Monthly summaries are produced during the year.

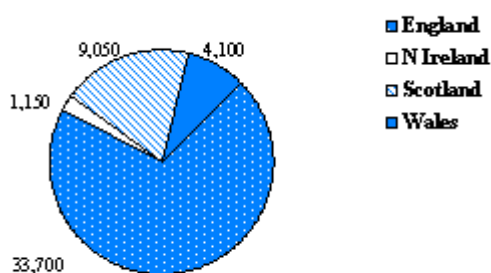
This report summarises the main findings from the UK Occupancy Survey for Serviced Accommodation 2001. In addition to this summary, fuller separate reports for the UK and for each National Board are available from the National Tourist Boards at the addresses listed on page 11. They contain the data from which this report was compiled, together with further details about weekend/weekday occupancy and occupancy according to the size, location, and tariff of the establishments.

8 What is covered by the survey?

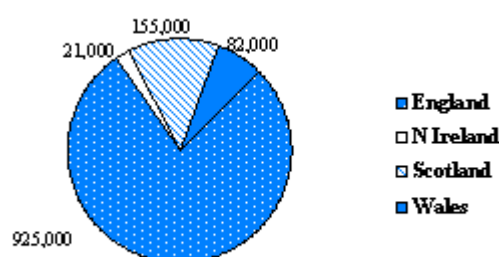
The types of accommodation in the survey are those defined (in the EU Directive) as tourist accommodation which is arranged in rooms and where bed-making and cleaning services are provided. It therefore includes hotels (including motels, travel lodges and inns), guesthouses and private houses offering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

There are about 48,000 establishments of this type in the UK which are known to the tourist boards, with a total of almost 1.2 million bedspaces.

**Distribution of total accommodation stock:
Number of establishments**



**Distribution of total accommodation stock:
Number of bedspaces**



Tourist Boards invited establishments to provide data for the survey on a monthly basis and almost 6,500 establishments agreed to do so at the beginning of 2000. Each month between 3,138 and 4,093 returned data and the occupancy rates in the report are calculated from these monthly samples. Both the recruited samples (those establishments agreeing to provide data) and the analytical samples (those establishments returning monthly data) have been closely monitored during the year 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 - ie only open accommodation is included. In calculating figures for England and for the UK, the data has been weighted by the number of available bedspaces in each contributing area.

9 English Tourist Board Regions (RTBs)

The definitions of the RTBs used in this report are as follows:

Cumbria (CTB):	County of Cumbria
Northumbria (NTB):	Northumberland, Durham, Tyne and Wear, Tees Valley
North West England (NWTB):	Lancashire, Merseyside, Greater Manchester, Cheshire
Yorkshire (YTB):	North Yorkshire, West Yorkshire, South Yorkshire, East Riding of Yorkshire, Kingston upon Hull, the two districts of North and North East Lincolnshire
Heart of England (HETB):	Staffordshire, Shropshire, West Midlands, Warwickshire, Herefordshire, Worcestershire, Gloucestershire, Nottinghamshire, Derbyshire, Rutland, Leicestershire, Northamptonshire, Lincolnshire (except for the two districts of North and North East Lincolnshire)
East of England (EETB):	Norfolk, Suffolk, Cambridgeshire, Essex, Bedfordshire, Hertfordshire,
London (LTB):	Greater London area
South West Tourism (SWT): (previously West Country Tourist Board)	Cornwall, Devon, Somerset and South Gloucestershire, Wiltshire, Western Dorset, Isles of Scilly
Southern (STB):	Hampshire, Isle of Wight, Dorset (districts of North Dorset, East Dorset, Purbeck, Bournemouth, Christchurch and Poole), Buckinghamshire, Berkshire, Oxfordshire
South East England (SEETB):	Kent, Surrey, East Sussex, West Sussex

It should be noted that prior to 2000, the county of Lincolnshire (except for the two districts of North and North East Lincolnshire) formed part of the East of England Tourist Board region.

10 Further information about the survey

Further information about the survey may be obtained from:

Janet Monteith
English Tourism Council
Thames Tower
Black's Road
LONDON
W6 9EL

Pamela Wilson
Northern Ireland Tourist Board
St Anne's Court
59 North Street
BELFAST
BT1 1NB

Brian Hay
VisitScotland
23 Ravelston Terrace
EDINBURGH
EH4 3TP

Birgitte Magnussen
Wales Tourist Board
Brunel House
2 Fitzalan Road
CARDIFF
CF2 1UY2