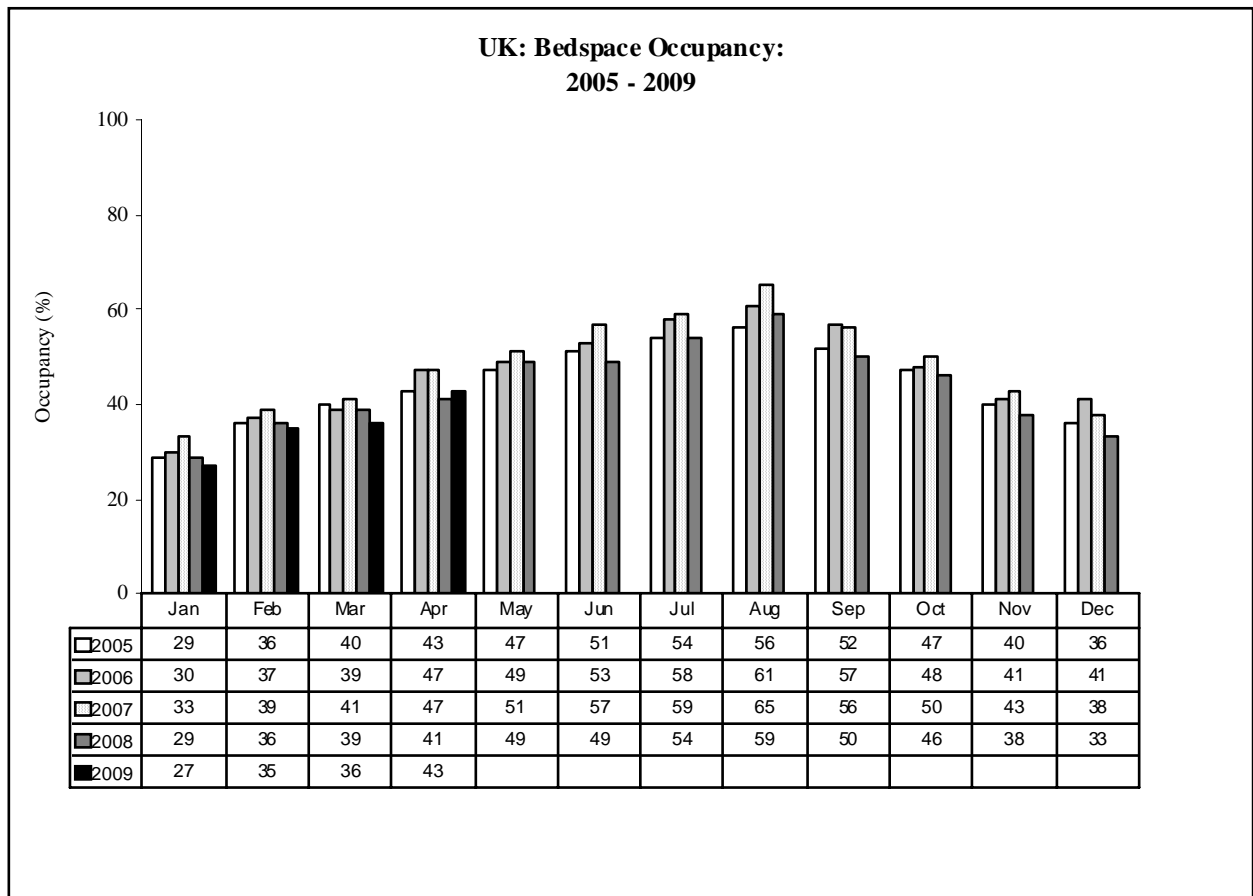


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

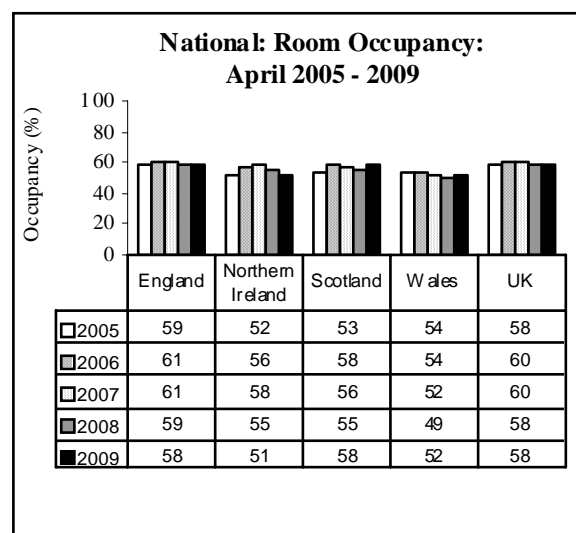
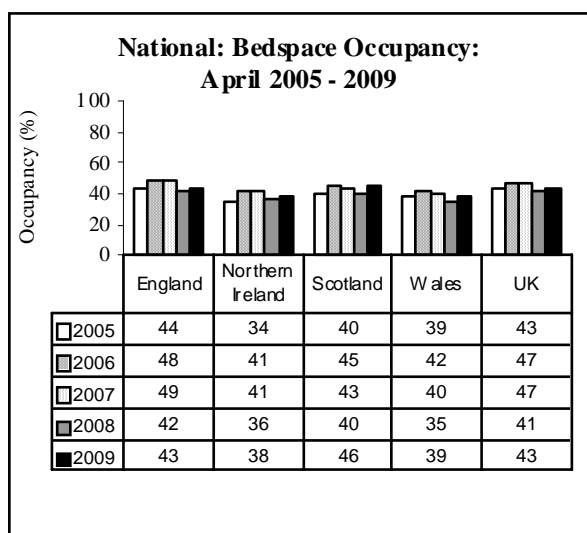
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

APRIL 2009



- Over 2050 hotels, guest houses and bed and breakfast establishments throughout the UK have supplied the data upon which the figures in this summary of results are based (see notes 2 and 3, page 7 – sample sizes and the calculation of occupancy rates).
- UK bedspace occupancy in April 2009 was 43%, 2 percentage points higher than in April 2008. At 58%, room occupancy was the same as in April 2008.



- Bedspace occupancy varied from 46% in Scotland to 38% in Northern Ireland, while room occupancy varied from 58% in England and Scotland to 51% in Northern Ireland.
- When compared with April 2008, bedspace occupancy rose in all four countries, with the greatest rise (of 6 percentage points) being in Scotland. Room occupancy also rose in Scotland and Wales but fell in England and Northern Ireland.
- When compared with four years earlier, Scotland saw a rise in occupancy levels – of 6 percentage points for bedspace occupancy and of 5 for room occupancy. In Northern Ireland, bedspace occupancy had risen (by 4 percentage points) but room occupancy had fallen slightly. In Wales, bedspace occupancy was the same as in April 2005 but room occupancy was 2 percentage points lower while in England both measures of occupancy had fallen by 1 percentage point.
- Bedspace occupancy by non-UK residents rose in England and Northern Ireland when compared with April 2008 and remained unchanged in Wales (comparable figures for Scotland are no longer collected - (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

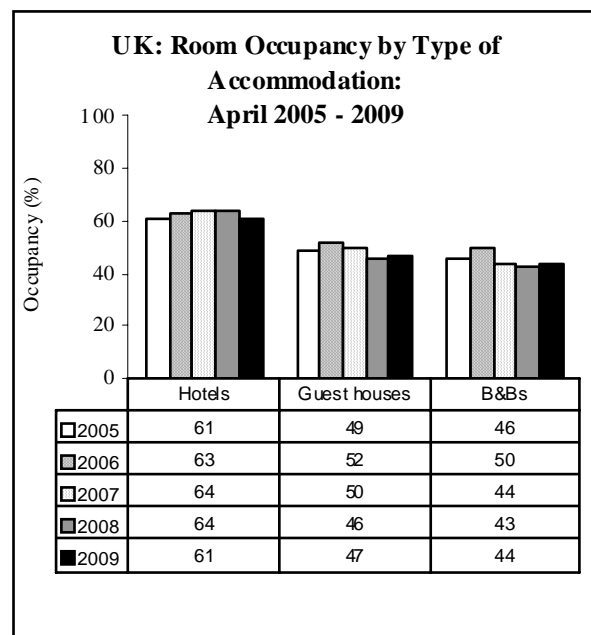
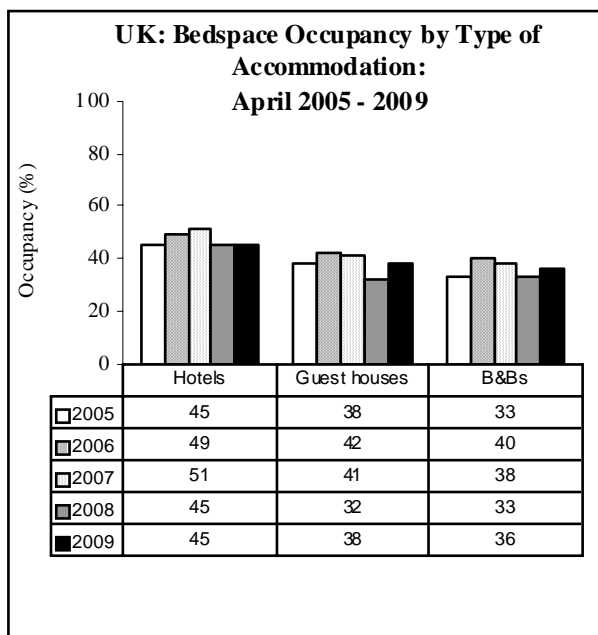
Table 1: Occupancy Levels: April 2007 – 2009

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	49	42	43	61	59	58	952	1123	1357
Northern Ireland	41	36	38	58	55	51	193	201	176
Scotland	43	40	46	56	55	58	374	375	359
Wales	40	35	39	52	49	52	190	201	172
UK	47	41	43	60	58	58	1709	1900	2064

Table 2: UK/Non-UK Occupancy Levels: April 2007 – 2009 (see notes 5a and 5b, page7)

	UK bedspace occupancy %			Non-UK bedspace occupancy %			Percentage of non-UK guests			Percentage of non-UK bednights			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	35	34	36	13	4	5	20	9	12	28	10	12	952	1123	1357
Northern Ireland	30	27	25	11	9	12	27	29	33	27	26	32	193	201	176
Scotland	34	**	**	6	**	**	16	**	**	16	**	**	374	375	359
Wales	37	31	34	2	2	2	5	**	**	5	6	5	190	201	172
UK	35	34	36	11	4	5	19	9	12	25	10	12	1709	1900	2064

** figures not available



- When compared with April 2008, occupancy levels in guest houses and bed and breakfast establishments rose (by up to 6 percentage points). In hotels, bedspace occupancy remained unchanged while room occupancy fell (see Table 3).
- The three smallest size categories (those establishments with less than 26 letting bedrooms) all saw a rise in occupancy levels. In those establishments with 26-50 and 51-100 letting bedrooms, bedspace occupancy also rose while room occupancy remained as in April 2008. The largest size category (those establishments with more than 100 letting bedrooms) experienced a fall in both measures of occupancy (of 6 percentage points for bedspace occupancy and of 8 for room occupancy) (see Table 5).
- Occupancy levels in seaside and country/village locations rose when compared with the previous year (by 5 percentage points for bedspace occupancy and by 3 for room occupancy). In the two urban locations (city/large towns and small towns), both measures of occupancy fell (see Table 6).
- Four tariff bands (those establishments with maximum charges of less than £20.00, £20.00 - £29.99, £40.00 - £49.99 and £50.00 - £59.99) saw a rise in occupancy levels, with the greatest rise (of 10 percentage points for bedspace occupancy and 9 for room occupancy) being in the £50.00 - £59.99 tariff band. Establishments in the £30.00 - £39.99 tariff band experienced a rise in bedspace occupancy with room occupancy remaining unchanged, while in the most expensive establishments (those with a maximum charge of more than £60) bedspace occupancy remained unchanged but room occupancy fell (see Table 7 and note 5a, page 7 (sample sizes)).

Table 3: Occupancy Levels by Type of Establishment: April 2007 – 2009

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	53	46	45	66	65	61	317	375	420
Northern Ireland	47	42	44	69	67	60	66	68	67
Scotland	46	44	49	60	61	63	195	234	216
Wales	43	40	45	56	55	59	97	101	83
UK	51	45	45	64	64	61	675	778	786
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	42	33	38	50	47	48	192	252	330
Northern Ireland	29	22	20	40	33	28	22	30	19
Scotland	39	30	39	49	41	48	73	61	64
Wales	40	31	35	50	43	44	37	37	41
UK	41	32	38	50	46	47	324	380	454
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	40	35	38	47	46	47	443	496	605
Northern Ireland	24	21	20	32	25	24	102	103	90
Scotland	32	26	32	38	33	39	106	80	79
Wales	28	21	22	33	27	28	56	63	48
UK	38	33	36	44	43	44	707	742	822

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: April 2007 – 2009 (see notes 5a & 5b, page 7)

	Bedspace occupancy %						Room occupancy %						Percentage of non-UK guests						Percentage of non-UK bednights					
	Weekend			Weekday			Weekend			Weekday			Weekend			Weekday			Weekend			Weekday		
	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	55	46	39	46	39	50	61	55	57	61	63	59	20	8	15	20	10	9	28	9	14	27	11	10
Northern Ireland	44	38	43	37	30	32	56	49	52	58	51	48	28	31	35	27	34	35	28	29	34	26	32	33
Scotland	47	44	52	39	38	42	54	52	59	54	56	57	15	**	**	16	**	**	15	**	**	15	**	**
Wales	46	40	47	35	33	34	54	49	55	49	50	50	4	**	**	7	**	**	4	5	4	7	7	5
UK	53	45	41	44	38	48	59	54	57	59	61	58	18	8	15	19	10	10	24	9	14	24	11	10

** figures not available

Table 5: Occupancy Levels by Size: April 2007 – 2009**a: Percentage Bedspace Occupancy**

	1 – 3 rooms				4 – 10 rooms				11 – 25 rooms				26 – 50 rooms				51 – 100 rooms				>100 rooms			
	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009
England	29	30	33	457	38	33	39	470	44	39	41	186	48	44	47	108	57	52	53	71	63	50	41	65
Northern Ireland	18	14	12	78	27	24	25	26	40	34	30	25	43	34	36	17	49	47	41	18	53	46	55	12
Scotland	29	24	29	64	35	31	38	99	38	36	42	66	47	44	48	44	54	54	61	38	56	50	55	47
Wales	27	21	23	48	38	31	33	53	42	36	43	29	44	41	44	23	49	42	41	11	45	47	60	8
UK	29	28	32	647	37	32	38	648	43	38	41	306	48	44	47	192	56	52	53	138	61	50	44	132

B: Percentage Bedroom Occupancy

England	35	39	40	457	47	45	48	470	54	52	52	186	60	60	60	108	68	68	68	71	75	73	62	65
Northern Ireland	24	18	16	78	35	34	32	26	65	55	43	25	60	55	47	17	71	71	58	18	77	75	72	12
Scotland	34	33	37	64	45	42	47	99	52	48	57	66	59	59	60	44	71	72	75	38	71	70	69	47
Wales	32	27	28	48	47	39	42	53	54	49	54	29	60	58	59	23	65	61	59	11	60	71	77	8
UK	35	37	38	647	46	44	47	648	54	51	53	306	60	60	60	192	68	68	68	138	73	72	64	132

Table 6: Occupancy Levels by Location: April 2007 – 2009**A: Percentage Bedspace Occupancy**

	Seaside				City/large town				Small town				Country/village			
	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009
England	42	37	41	322	60	50	48	240	47	45	41	275	38	34	39	515
Northern Ireland	36	37	33	41	47	40	43	55	41	31	37	17	30	28	27	63
Scotland	40	36	46	57	54	45	51	113	38	39	41	74	38	35	41	115
Wales	46	37	45	41	43	49	49	22	38	34	32	20	37	31	35	89
UK	42	37	42	461	58	49	48	430	45	43	40	386	38	34	39	782

B: Percentage Bedroom Occupancy

England	53	49	52	322	72	71	67	240	57	61	55	275	49	47	49	515
Northern Ireland	50	49	41	41	68	64	59	55	60	57	50	17	41	38	36	63
Scotland	50	47	53	57	67	63	66	113	56	56	57	74	49	47	51	115
Wales	58	49	55	41	63	75	69	22	50	53	48	20	46	41	45	89
UK	53	49	52	461	71	70	67	430	56	60	55	386	49	46	49	782

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2007 – 2009 (see note 5a, page 7)**A: Percentage Bedspace Occupancy**

	<£20.00				£20.00 – £29.99				£30.00 – £39.99				£40.00 – £49.99				£50.00 - £59.99				>£60.00			
	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009
England	32	20	-	-	30	22	26	157	35	32	35	330	40	43	45	203	42	38	48	99	50	45	44	452
Northern Ireland	-	-	-	-	20	17	19	51	40	31	31	43	35	34	31	27	49	39	38	12	50	44	45	41
Scotland	19	16	-	-	37	36	41	77	39	36	39	66	40	32	42	48	38	40	53	41	49	44	49	124
Wales	-	-	-	-	29	22	22	29	37	28	30	50	42	38	40	27	43	40	44	11	46	43	47	54
UK	29	20	24	7	31	24	28	314	36	32	35	489	40	41	44	305	42	38	48	163	50	45	45	671

B: Percentage Bedroom Occupancy

England	35	25	-	-	39	30	34	157	45	43	44	330	51	55	57	203	56	50	60	99	66	64	59	452
Northern Ireland	-	-	-	-	25	23	24	51	55	49	39	43	54	52	43	27	72	62	49	12	72	67	62	41
Scotland	28	22	-	-	60	50	56	77	56	57	56	66	52	46	54	48	50	55	65	41	61	60	59	124
Wales	-	-	-	-	36	29	28	29	45	37	38	50	55	52	51	27	56	50	59	11	61	60	63	54
UK	33	25	30	7	42	32	36	314	47	45	45	489	52	54	56	305	55	51	60	163	65	63	59	671

- occupancy level not available due to insufficient data

Notes

1. The figures in this summary are based on data available within eight weeks of the end of the month. In many 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 2009 Annual Summary.
2. The minimum target sample size for Northern Ireland, Scotland and Wales is 200 open establishments per month while in England there is currently no target minimum sample size. Larger sample sizes may be used in some areas in order to enable Boards to undertake further analysis based on geographical sub-divisions of the data.
3. (a) 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. 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.
(b) The weighting figures for Northern Ireland and Scotland have been updated for 2009 with the 2008 data being used for England and the 2007 data for Wales.
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 and 7 may 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 and 4), not all establishments provide daily data (Table 4) and not all establishments give tariff details (Table 7); and
 - (b) because of changes in the data collected, it is no longer possible to provide UK/non UK figures for Scotland (Tables 2 and 4) or figures relating to arrivals for Wales.
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 December 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 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 TNS Travel and Tourism (UK Survey Co-ordinator for 2009) from figures supplied by (or on behalf of) the National Tourist Boards of England, Northern Ireland and Scotland and Visit Wales (part of the Welsh Assembly Government).

Further information about the surveys in individual areas may be obtained from the relevant organisations – VisitBritain (0208 846 9000), Northern Ireland Tourist Board (02890 231 221), VisitScotland (0131-332 2433) and Visit Wales (029 2047 9909)