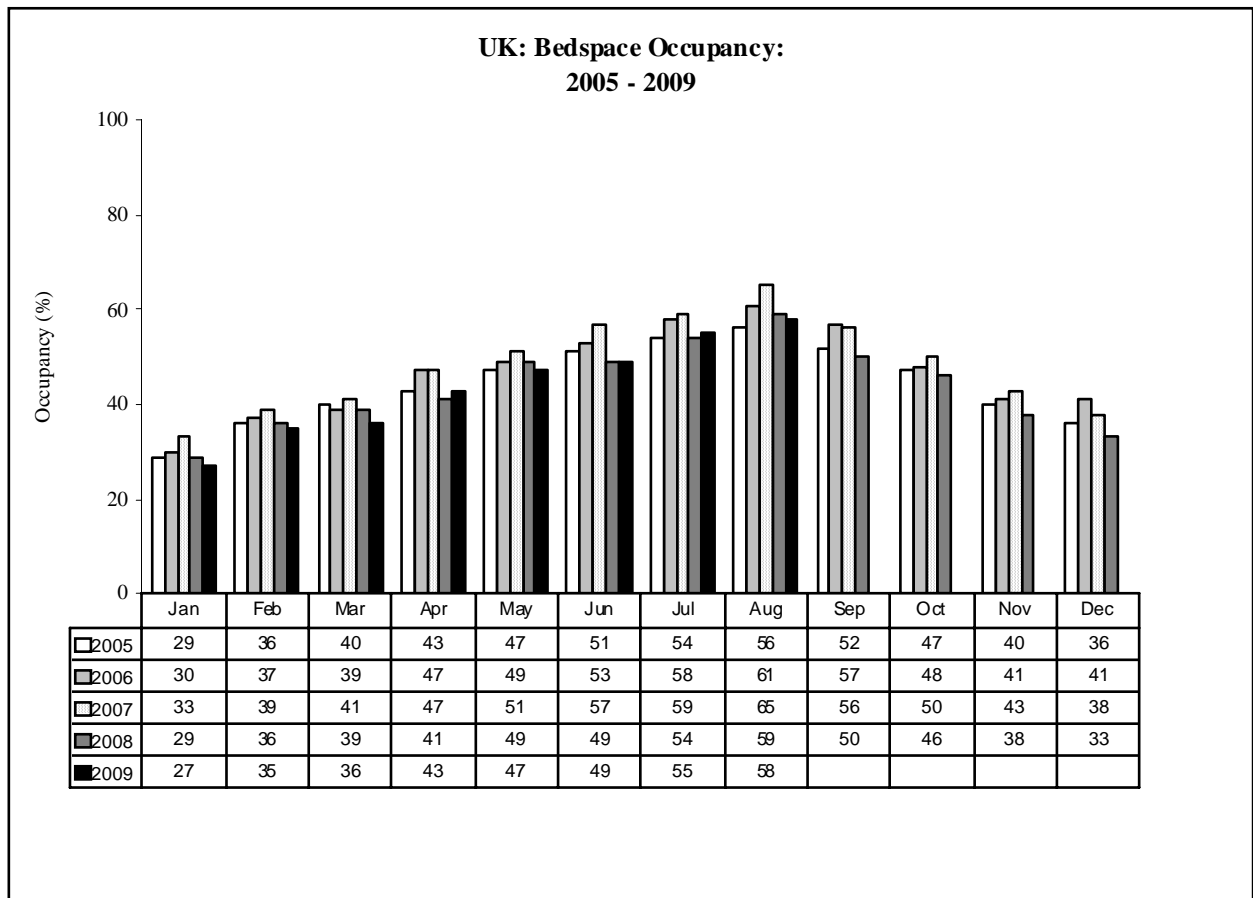


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

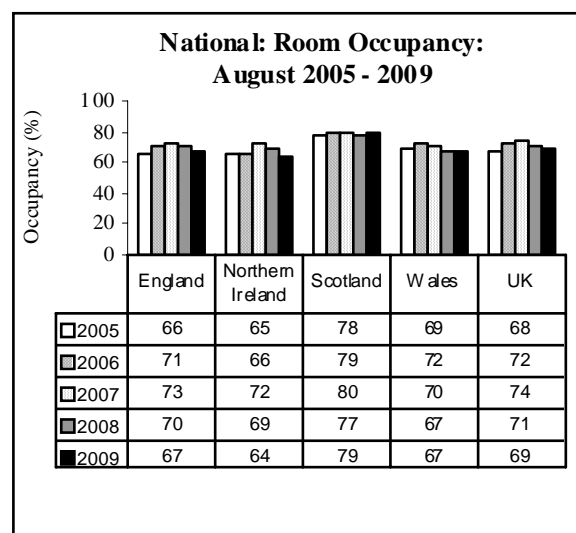
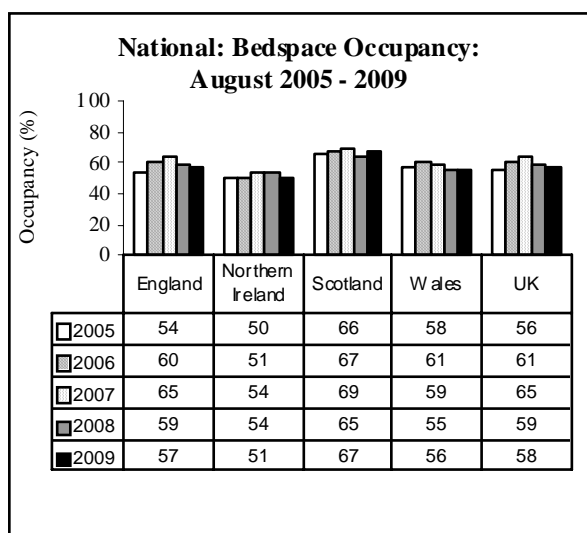
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

AUGUST 2009



- Almost 2,000 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 August 2009 was 58%, one percentage point lower than in August 2008. At 69%, room occupancy was 2 percentage points lower than in August 2008.

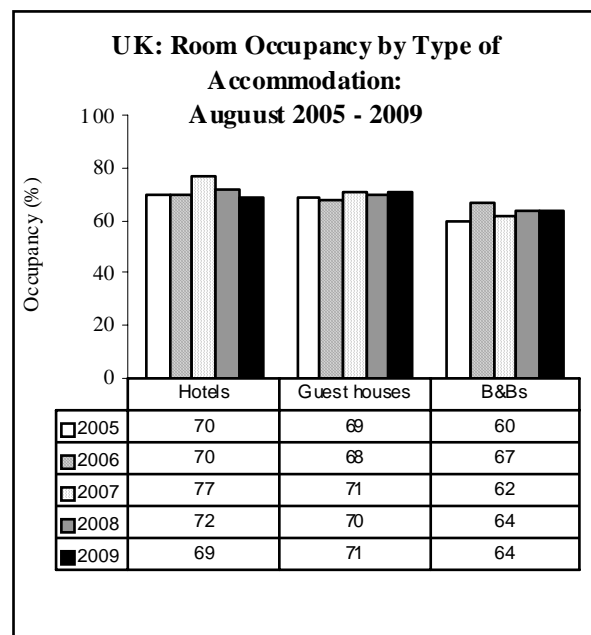
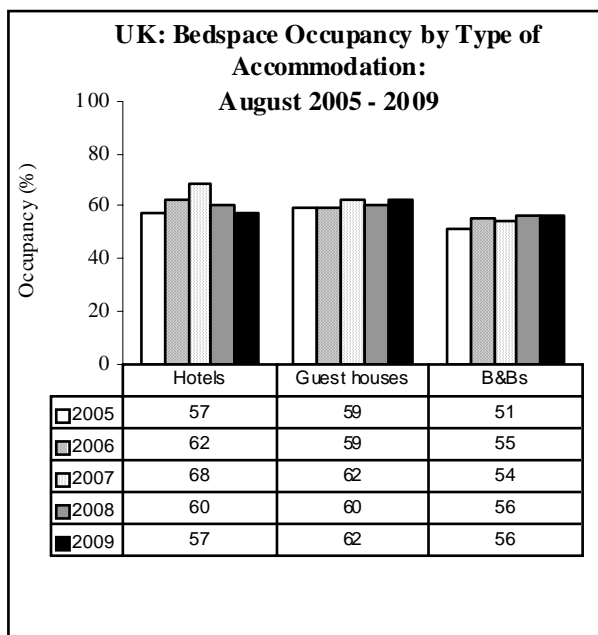


- Bedspace occupancy varied from 67% in Scotland to 51% in Northern Ireland, while room occupancy varied from 79% in Scotland to 64% in Northern Ireland.
- When compared with August 2008, both room and bedspace occupancy rose in Scotland (by 2 percentage points in each case). In Wales bedspace occupancy also rose (by 1 percentage point) while room occupancy remained unchanged. In England and Northern Ireland both measures of occupancy fell (by 2 and 3 percentage points in England and by 3 and 5 in Northern Ireland).
- When compared with four years earlier, both room and bedspace occupancy levels in England and Scotland had risen (by 1 and 3 percentage points in England and by 1 for both measures in Scotland). In Northern Ireland bedspace occupancy had risen (by 1 percentage point) but room occupancy had fallen (also by 1 percentage point) while in Wales both room and bedspace occupancy had fallen (by 2 percentage points in each case).
- Bedspace occupancy by non-UK residents rose when compared with August 2008 in England, Wales and Northern Ireland (comparable figures for Scotland are no longer collected - (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	65	59	57	73	70	67	927	1303	1268
Northern Ireland	54	54	51	72	69	64	185	199	143
Scotland	69	65	67	80	77	79	404	394	395
Wales	59	55	56	70	67	67	200	194	191
UK	65	59	58	74	71	69	1716	2090	1997

	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	48	50	49	8	7	9	13	12	15	15	13	15	927	1303	1268
Northern Ireland	36	36	31	18	18	20	41	40	41	33	34	38	185	199	143
Scotland	46	**	**	20	**	**	33	**	**	31	**	**	404	394	395
Wales	55	48	52	4	4	5	8	**	**	7	8	8	200	194	191
UK	48	50	49	10	7	9	16	13	16	17	13	15	1716	2090	1997

** figures not available



- When compared with August 2008, occupancy levels in guest houses rose (by 2 percentage points for bedspace occupancy and by 1 for room occupancy). In bed and breakfast establishments both measures of occupancy remained unchanged while in hotels room and bedspace occupancy both fell by 3 percentage points (see Table 3).
- When compared with August 2008, occupancy levels fell in 3 size categories (those establishments with 11-25, 51-100 and more than 100 letting bedrooms), with the greatest falls (of 4 percentage points for bedspace occupancy and 7 for room occupancy) being in the largest establishments. Establishments with 4-10 letting bedrooms were the only size category to experience a rise (albeit small) in occupancy levels. Establishments with 26-50 letting bedrooms saw a rise in room occupancy (of 1 percentage point) but a corresponding fall in bedspace occupancy while in the smallest establishments (those with 3 or less letting bedrooms) bedspace occupancy remained as in August 2008 but room occupancy fell (by 1 percentage point) (see Table 5).
- When compared with August 2008, occupancy levels in seaside and city/large town locations fell (by 2 percentage points for bedspace occupancy and 1 for room occupancy in seaside locations and by 2 percentage points (bedspace) and 4 (room) in city/large town locations). In small town locations, bedspace occupancy rose but room occupancy fell (by 4 percentage points), while in country/village locations room occupancy rose (by 1 percentage point) with bedspace occupancy remaining unchanged (see Table 6).
- The most least expensive establishments (those with a maximum tariff of less than £20.00) experienced a rise in occupancy levels. Room occupancy remained at its 2008 level in establishments with a maximum tariff of £30.00-£39.99 as did bedspace occupancy in the most expensive establishments (those with a maximum tariff of more that £60.00). All other occupancy levels showed a decrease when compared with August 2008 (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	69	59	56	76	71	67	303	414	396
Northern Ireland	55	59	56	76	76	70	82	72	44
Scotland	69	65	66	81	78	80	214	234	237
Wales	60	56	59	73	71	71	97	96	93
UK	68	60	57	77	72	69	696	816	770
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	60	59	61	69	69	70	181	321	301
Northern Ireland	54	46	43	67	56	50	24	26	20
Scotland	69	66	70	79	77	81	75	68	70
Wales	66	59	57	75	68	68	38	36	42
UK	62	60	62	71	70	71	318	451	433
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	52	56	55	60	64	64	443	566	567
Northern Ireland	48	41	37	58	48	45	93	101	79
Scotland	70	64	67	75	70	73	115	92	88
Wales	48	45	44	57	49	52	65	62	56
UK	54	56	56	62	64	64	716	821	790

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: August 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	71	55	53	61	63	62	75	70	65	71	70	69	11	14	18	15	10	12	13	14	17	16	12	14
Northern Ireland	61	57	46	49	52	50	74	69	61	70	67	62	40	39	41	44	45	37	35	35	36	36	35	34
Scotland	73	66	70	66	63	65	80	75	78	79	78	80	30	0	0	35	0	0	28	0	0	32	0	0
Wales	65	58	62	54	51	52	74	68	70	67	66	66	6	0	0	9	0	0	6	7	7	7	8	9
UK	71	57	56	61	62	62	76	70	67	72	71	70	14	14	18	18	11	13	15	14	17	18	12	14

** figures not available

Table 5: Occupancy Levels by Size: August 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	46	51	49	422	55	59	60	438	60	59	56	163	59	59	58	110	70	66	64	71	80	57	51	64
Northern Ireland	40	34	31	68	51	48	43	27	54	50	48	16	55	52	51	11	57	59	40	9	59	67	67	12
Scotland	67	59	65	75	66	61	63	105	66	60	65	75	70	65	69	48	73	69	67	41	74	68	69	50
Wales	50	45	46	56	60	54	55	57	59	59	56	29	62	59	57	25	63	44	58	13	58	66	66	11
UK	49	51	51	621	57	59	60	627	61	59	57	283	61	60	59	194	70	65	64	134	77	59	55	137
B: Percentage Bedroom Occupancy																								
England	54	59	57	422	64	68	69	438	69	68	66	163	69	69	70	110	80	76	74	71	82	72	63	64
Northern Ireland	47	40	37	68	63	57	51	27	73	69	64	16	75	69	61	11	78	76	61	9	82	83	79	12
Scotland	73	66	72	75	77	72	76	105	78	73	76	75	81	77	80	48	86	85	80	41	85	83	85	50
Wales	59	50	54	56	68	61	67	57	69	70	67	29	75	75	67	25	77	70	71	13	79	79	78	11
UK	57	59	58	621	66	68	69	627	70	69	67	283	71	70	71	194	81	77	74	134	82	74	67	137

Table 6: Occupancy Levels by Location: August 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	66	64	61	303	74	58	56	225	58	57	56	254	51	55	54	480
Northern Ireland	57	59	54	34	55	57	51	46	54	48	55	14	48	45	43	49
Scotland	67	66	65	63	75	70	72	117	65	62	62	82	67	59	65	133
Wales	67	65	66	45	51	62	55	22	53	41	53	24	58	52	52	100
UK	66	64	62	445	72	60	58	410	59	56	57	374	54	55	55	762

B: Percentage Bedroom Occupancy

England	75	73	72	303	79	72	67	225	68	67	62	254	60	63	64	480
Northern Ireland	74	72	69	34	77	74	65	46	73	65	66	14	56	54	51	49
Scotland	78	74	75	63	86	84	86	117	78	75	75	82	77	70	75	133
Wales	77	75	75	45	75	75	71	22	69	65	66	24	67	60	61	100
UK	76	73	72	445	80	74	70	410	70	68	64	374	63	64	65	762

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	63	34	53	5	52	50	49	136	53	57	56	289	56	61	58	199	56	63	57	93	63	60	59	432
Northern Ireland	-	-	-	-	42	37	27	38	52	59	41	37	56	47	51	18	53	53	62	9	58	59	54	34
Scotland	52	37	-	-	63	61	61	58	63	60	59	94	66	63	58	42	73	62	71	39	72	68	73	158
Wales	-	-	-	-	51	40	44	30	57	54	51	54	54	55	52	26	57	56	52	16	65	59	63	64
UK	61	34	52	11	53	51	50	262	55	57	56	474	57	61	58	285	58	62	59	157	64	61	61	688

B: Percentage Bedroom Occupancy

England	71	44	59	5	61	59	57	136	62	65	65	289	65	70	69	199	68	71	68	93	73	71	67	432
Northern Ireland	-	-	-	-	51	43	31	38	71	69	54	37	70	63	66	18	75	68	66	9	78	77	70	34
Scotland	38	41	-	-	80	76	68	58	81	77	78	94	78	75	71	42	82	71	80	39	83	82	84	158
Wales	-	-	-	-	57	43	49	30	67	61	60	54	66	67	64	26	71	68	68	16	78	75	74	64
UK	66	44	59	11	63	60	57	262	65	66	66	474	67	70	69	285	70	71	69	157	75	73	70	688

- 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)