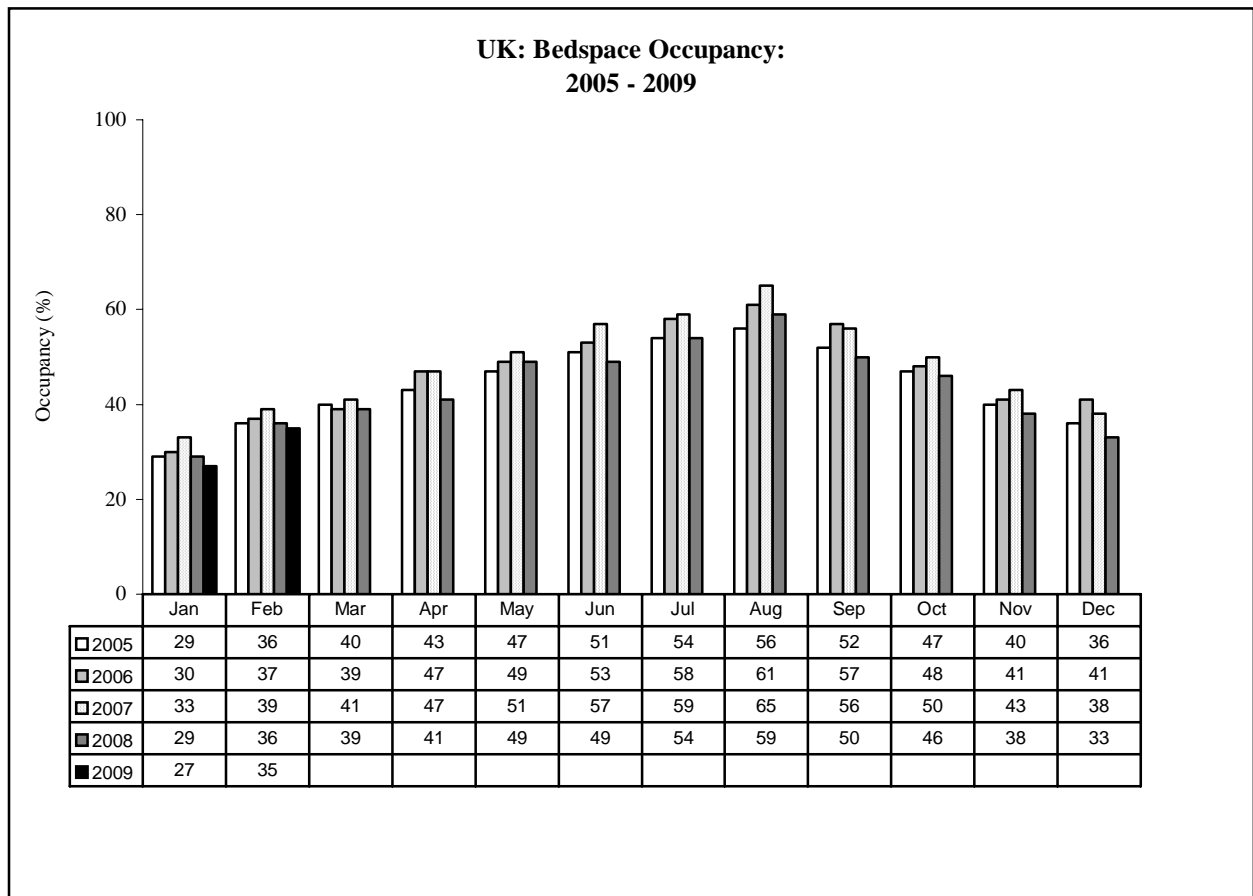


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

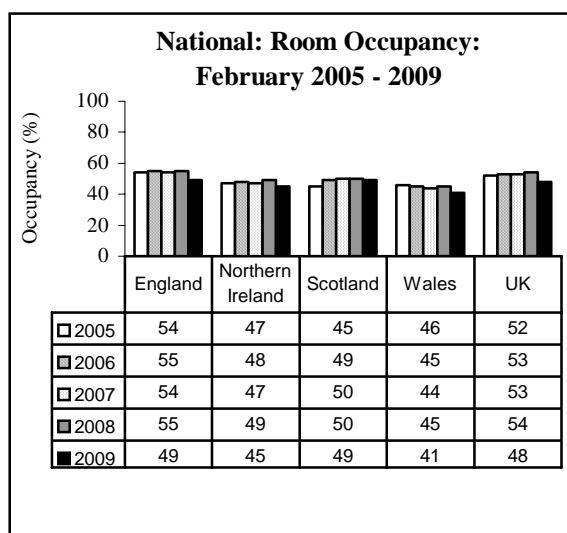
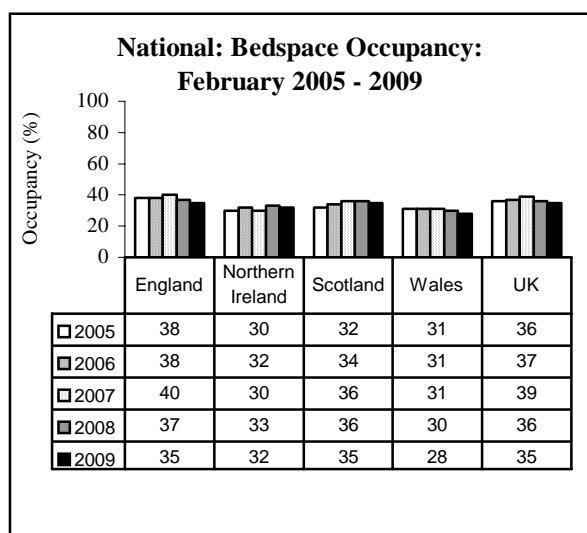
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

FEBRUARY 2009



- Over 1900 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 February 2009 was 35%, 1 percentage point lower than in February 2008. At 48%, room occupancy was 6 percentage points lower than in February 2008, perhaps further indication that business trade is being more affected by the current financial position than holiday trade.



- Bedspace occupancy varied from 35% in England and Scotland to 28% in Wales, while room occupancy varied from 49% in England and Scotland to 41% in Wales.
- When compared with February 2008, both room and bedspace occupancy fell in all four countries, with the greatest fall (of 6 percentage points) being in room occupancy in England.
- When compared with four years earlier, occupancy levels in Scotland had risen (by 3 percentage points for bedspace occupancy and by 4 for room occupancy) but those in England and Wales fallen. In Northern Ireland bedspace occupancy had risen while room occupancy had fallen.
- Bedspace occupancy by non-UK residents rose in England and Northern Ireland when compared with February 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)).

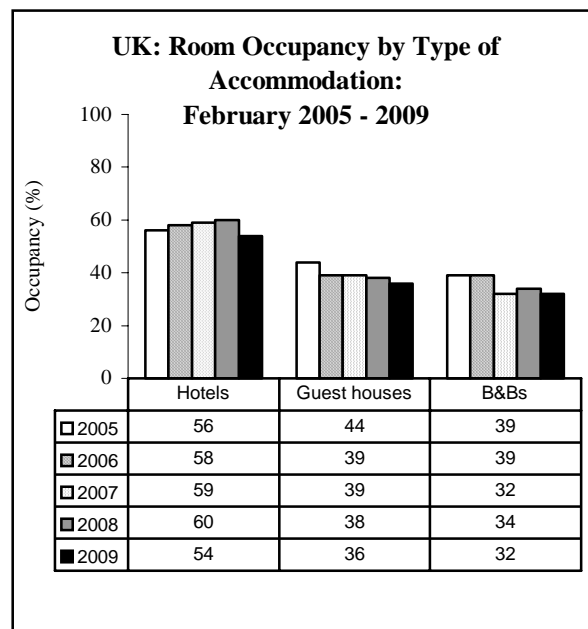
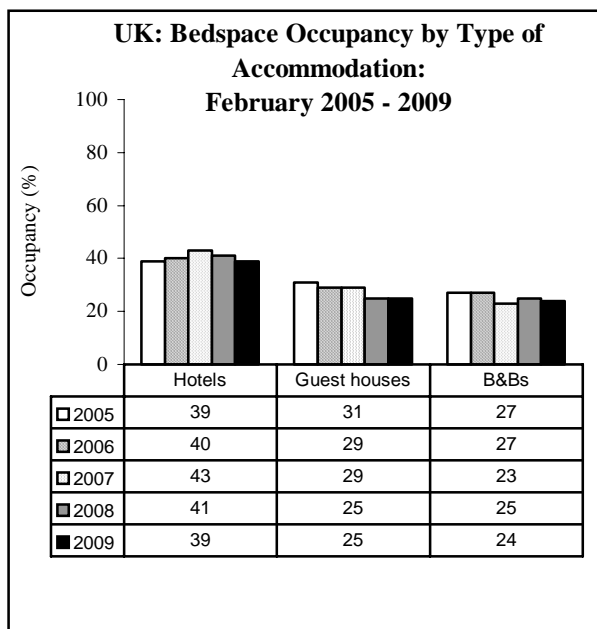
Table 1: Occupancy Levels: February 2007 – 2009

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	40	37	35	54	55	49	916	1066	1239
Northern Ireland	30	33	32	47	49	45	185	172	177
Scotland	36	36	35	50	50	49	338	328	320
Wales	31	30	28	44	45	41	164	165	167
UK	39	36	35	53	54	48	1603	1731	1903

Table 2: UK/Non-UK Occupancy Levels: February 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	32	29	26	6	3	4	13	6	13	16	8	14	916	1066	1239
Northern Ireland	24	26	22	6	7	10	21	28	31	19	23	32	185	172	177
Scotland	29	**	**	3	**	**	8	**	**	9	**	**	338	328	320
Wales	28	28	25	1	1	1	3	**	**	4	3	4	164	165	167
UK	31	29	26	5	3	4	12	6	13	14	8	14	1603	1731	1903

** figures not available



- When compared with February 2008, occupancy levels in all types of accommodation fell, with the exception of bedspace occupancy in guest houses which remained unchanged (see Table 3).
- All size categories saw a fall in both measures of occupancy when compared with February 2008. The greatest falls (of up to 11 percentage points) were for room occupancy in the three largest size categories (those establishments with 26-50, 51-100 and more than 100 letting bedrooms) (see Table 5).
- Occupancy levels in all types of locations again fell when compared with the previous year, with the greatest falls (of up to 9 percentage points in small town locations) being for room occupancy (see Table 6).
- When compared with February 2008, occupancy levels in all tariff bands fell with the exception of bedspace occupancy in the £50.00 - £59.99 tariff band which remained unchanged (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	45	42	39	60	61	54	307	360	379
Northern Ireland	37	39	38	60	57	54	69	67	65
Scotland	40	40	39	56	56	54	201	218	204
Wales	35	36	34	49	53	49	96	85	89
UK	43	41	39	59	60	54	673	730	737
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	31	26	26	41	40	37	182	253	310
Northern Ireland	16	20	21	25	32	27	22	20	18
Scotland	24	23	25	33	33	36	58	54	56
Wales	24	22	20	30	29	26	30	32	38
UK	29	25	25	39	38	36	292	359	422
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	25	27	26	35	37	34	427	453	548
Northern Ireland	13	16	11	18	24	17	94	85	94
Scotland	17	17	19	23	24	28	79	56	60
Wales	16	16	13	25	23	21	38	48	40
UK	23	25	24	32	34	32	638	642	742

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: Feb 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	43	40	31	38	35	39	51	50	50	58	60	46	14	6	16	12	7	10	17	7	16	15	9	12
Northern Ireland	32	35	38	26	30	25	42	47	47	45	51	41	22	28	32	24	33	34	18	24	33	20	26	34
Scotland	39	39	41	32	34	31	46	46	48	50	53	48	8	**	**	9	**	**	8	**	**	9	**	**
Wales	33	32	31	28	29	25	41	40	40	45	47	42	3	**	**	4	**	**	3	2	3	4	4	6
UK	42	39	32	36	34	37	49	49	49	56	58	46	13	6	16	11	8	11	15	7	15	14	9	12

** figures not available

Table 5: Occupancy Levels by Size: February 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	21	23	19	410	27	27	26	440	31	34	30	155	42	39	38	110	44	45	43	70	57	45	41	54
Northern Ireland	7	8	6	84	14	20	21	20	30	30	26	28	30	36	31	16	38	40	34	20	45	45	52	9
Scotland	13	16	15	50	29	31	24	80	33	32	33	57	41	39	34	46	46	49	51	37	52	46	47	47
Wales	16	16	16	37	27	23	19	53	33	29	32	28	37	37	35	26	42	46	35	13	37	42	39	10
UK	19	21	18	581	27	27	25	593	31	33	30	268	41	39	37	198	44	45	43	140	55	45	42	120

B: Percentage Bedroom Occupancy

England	28	31	27	410	38	37	35	440	41	45	42	155	56	55	50	110	55	67	55	70	74	68	59	54
Northern Ireland	10	12	8	84	21	32	28	20	50	50	41	28	46	53	40	16	62	60	53	20	74	62	69	9
Scotland	18	22	24	50	40	46	36	80	46	45	45	57	56	52	46	46	66	65	65	37	66	66	65	47
Wales	20	22	22	37	36	33	27	53	45	41	43	28	54	54	50	26	55	67	51	13	59	62	60	10
UK	26	29	26	581	38	38	34	593	42	45	42	268	56	55	49	198	57	67	56	140	72	67	60	120

Table 6: Occupancy Levels by Location: February 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	30	32	30	259	52	46	42	239	36	36	32	267	33	29	28	471
Northern Ireland	25	26	27	35	39	39	37	60	26	31	34	17	18	21	17	65
Scotland	29	27	24	39	47	43	44	110	34	35	31	71	29	32	30	100
Wales	40	36	33	42	46	46	37	24	25	27	23	22	26	24	23	79
UK	30	32	29	375	51	45	42	433	35	35	31	377	32	29	28	715

b: Percentage Bedroom Occupancy

England	41	45	39	259	68	67	61	239	48	54	44	267	43	40	38	471
Northern Ireland	38	37	35	35	63	57	54	60	43	51	48	17	25	30	23	65
Scotland	39	38	32	39	62	60	61	110	50	50	48	71	41	43	40	100
Wales	52	49	44	42	68	72	58	24	41	46	36	22	34	33	32	79
UK	41	44	38	375	67	66	61	433	48	53	44	377	42	40	38	715

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): Feb 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	22	20	16	6	16	18	15	147	25	26	23	291	34	32	29	175	28	31	30	100	46	40	38	416
Northern Ireland	9	-	-	-	9	11	12	54	24	27	26	43	25	33	25	21	32	39	26	14	39	40	40	43
Scotland	13	-	-	-	32	28	21	71	35	35	32	53	30	33	32	43	33	32	36	35	42	40	42	113
Wales	-	-	-	-	18	19	14	30	22	20	15	42	33	28	29	23	36	35	37	13	38	38	35	59
UK	20	20	15	9	18	19	16	302	26	27	24	429	33	32	29	262	29	31	31	162	45	40	38	631

B: Percentage Bedroom Occupancy

England	28	27	23	6	25	26	22	147	35	36	32	291	43	44	38	175	39	46	39	100	62	60	52	416
Northern Ireland	12	-	-	-	14	17	18	54	35	40	34	43	40	54	36	21	51	59	39	14	65	58	56	43
Scotland	21	-	-	-	53	45	31	71	49	53	49	53	46	47	46	43	46	44	53	35	53	54	57	113
Wales	-	-	-	-	26	26	23	30	31	27	23	42	46	39	40	23	53	52	46	13	53	57	51	59
UK	27	26	22	9	29	28	23	302	37	38	33	429	44	44	39	262	41	46	41	162	60	59	53	631

- 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)