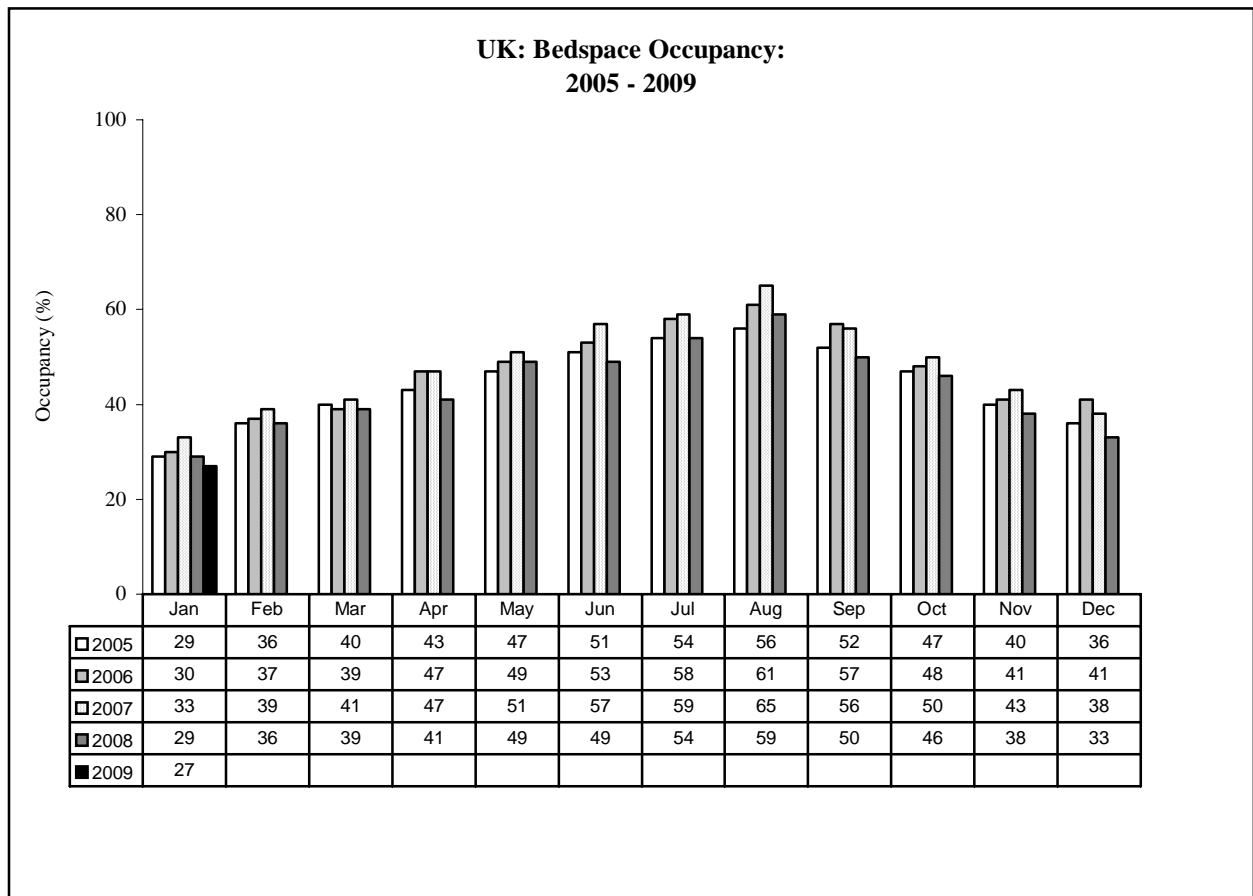


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

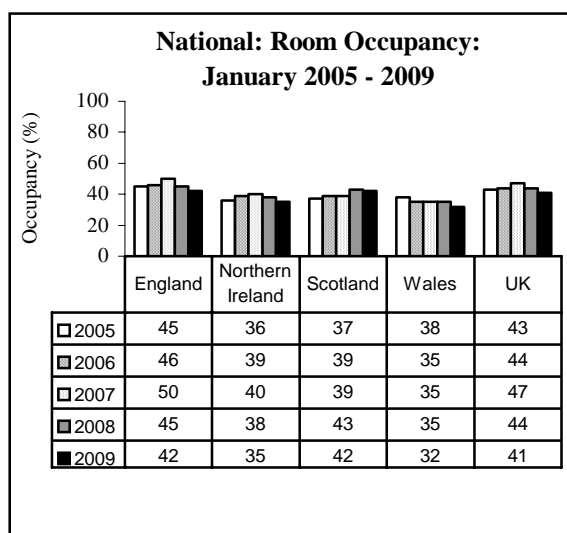
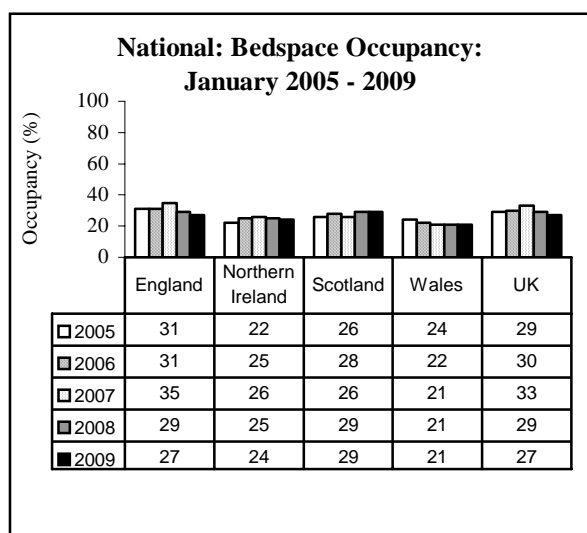
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

JANUARY 2009



- Over 1800 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 January 2009 was 27%, 2 percentage points lower than in January 2008. At 41%, room occupancy was 3 percentage points lower than in January 2008.

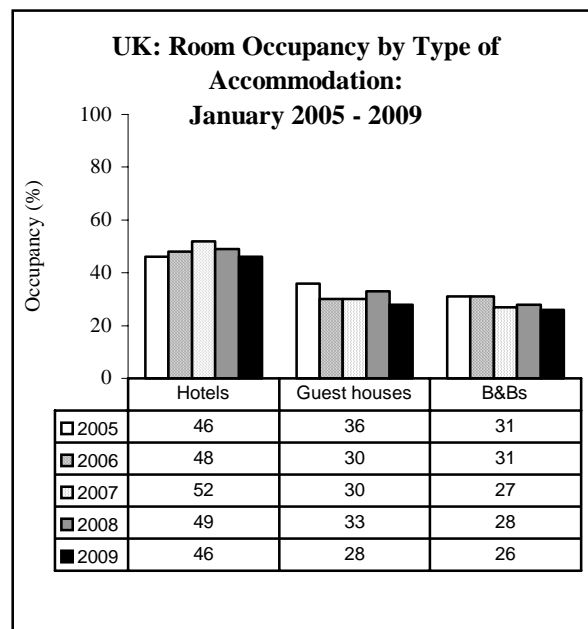
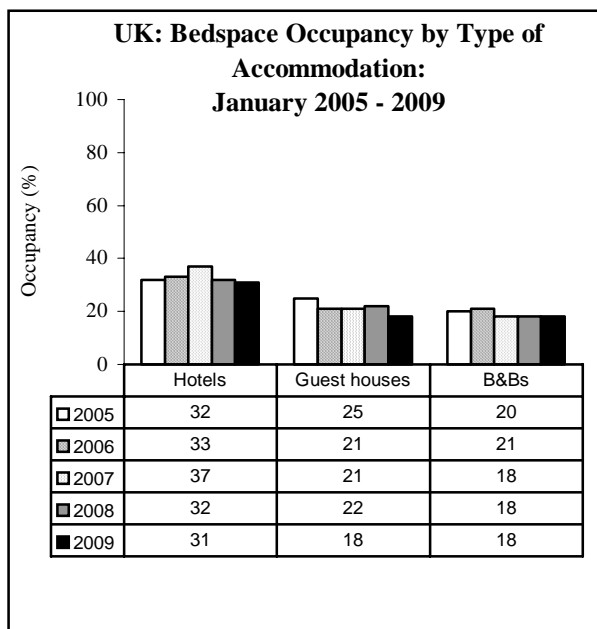


- Bedspace occupancy varied from 29% in Scotland to 21% in Wales, while room occupancy varied from 42% in England and Scotland to 32% in Wales.
- When compared with January 2008, bedspace occupancy remained unchanged in Scotland and Wales but fell in England and Northern Ireland. Room occupancy fell in all four countries (by up to 3 percentage points).
- When compared with four years earlier, occupancy levels in Scotland had risen but those in England and Wales had fallen. In Northern Ireland bedspace occupancy had risen while room occupancy had fallen slightly.
- Bedspace occupancy by non-UK residents rose in England and Northern Ireland when compared with January 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)).

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	35	29	27	50	45	42	839	960	1191
Northern Ireland	26	25	24	40	38	35	183	170	183
Scotland	26	29	29	39	43	42	327	321	293
Wales	21	21	21	35	35	32	152	144	151
UK	33	29	27	47	44	41	1501	1595	1818

	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	30	22	19	5	2	4	13	7	16	16	9	17	839	960	1191
Northern Ireland	20	19	17	5	6	7	23	25	27	21	24	31	183	170	183
Scotland	21	**	**	2	**	**	8	**	**	9	**	**	327	321	293
Wales	19	19	19	1	1	1	4	**	**	6	4	6	152	144	151
UK	28	22	19	4	2	4	12	7	16	14	9	17	1501	1595	1818

** figures not available



- When compared with January 2008, occupancy levels in all types of accommodation fell, with the exception of bedspace occupancy in bed and breakfast establishments which remained unchanged (see Table 3).
- When compared with January 2008, bedspace occupancy levels in establishments with 26-50 letting bedrooms rose while room occupancy remained unchanged. Bedspace occupancy in establishments with 51-100 letting bedrooms also remained unchanged but room occupancy fell slightly. The remaining four size categories all saw a fall in both measures of occupancy with the greatest falls (of 8 percentage points for both bedspace and room occupancy) again being in the largest establishments (see Table 5).
- Occupancy levels in all types of locations again fell when compared with the previous year, with the greatest falls being in seaside locations and the smallest in country/village locations (see Table 6).
- When compared with January 2008, occupancy levels in the under £20.00 tariff band rose while those in the remaining five tariff bands fell (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	40	33	31	55	50	46	283	293	389
Northern Ireland	32	29	29	51	46	42	71	69	69
Scotland	29	33	32	44	48	46	199	222	200
Wales	26	25	26	40	40	39	85	83	85
UK	37	32	31	52	49	46	638	667	743
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	22	24	19	32	35	29	148	223	279
Northern Ireland	12	16	11	19	27	16	23	21	22
Scotland	17	16	17	25	25	25	57	48	46
Wales	15	15	13	21	20	17	26	24	33
UK	21	22	18	30	33	28	254	316	380
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	20	20	19	30	30	27	408	444	518
Northern Ireland	13	12	10	16	17	13	89	80	92
Scotland	13	13	15	16	20	22	71	51	47
Wales	11	9	12	18	17	17	41	37	33
UK	18	18	18	27	28	26	609	612	690

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: Jan 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	36	29	26	36	29	29	44	37	46	55	51	37	12	6	17	13	8	14	18	9	18	14	9	16
Northern Ireland	25	27	29	21	24	19	34	37	37	38	41	34	23	23	34	20	29	29	22	21	34	21	25	32
Scotland	25	30	30	27	29	28	31	37	36	41	46	44	7	**	**	9	**	**	9	**	**	10	**	**
Wales	22	21	22	21	21	20	29	28	27	38	38	35	3	**	**	5	**	**	4	3	5	7	6	8
UK	33	29	26	33	28	28	41	36	44	51	49	38	11	6	17	12	8	14	16	9	17	13	9	16

** figures not available

Table 5: Occupancy Levels by Size: January 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	15	18	14	398	21	22	20	392	25	27	26	157	34	28	31	110	36	37	37	68	52	39	29	66
Northern Ireland	5	5	5	83	16	15	14	23	23	24	21	31	22	27	23	16	35	28	30	21	42	37	35	9
Scotland	10	11	10	36	19	22	23	70	24	28	25	56	32	31	27	43	35	42	42	37	40	38	37	48
Wales	11	10	10	31	16	17	18	49	27	23	25	26	26	28	28	22	30	26	24	14	29	25	26	9
UK	14	16	13	548	20	22	20	534	25	27	26	270	33	28	30	191	35	37	37	140	48	38	30	132
B: Percentage Bedroom Occupancy																								
England	22	27	21	398	32	33	28	392	36	39	37	157	47	42	43	110	49	52	51	68	70	59	50	66
Northern Ireland	7	8	6	83	20	24	20	23	40	40	33	31	34	40	34	16	55	46	42	21	70	55	52	9
Scotland	13	17	15	36	28	33	33	70	35	41	36	56	43	45	39	43	50	57	55	37	57	56	54	48
Wales	14	16	14	31	25	27	24	49	39	38	37	26	41	42	41	22	40	41	36	14	47	44	46	9
UK	20	25	20	548	31	33	28	534	36	39	37	270	46	42	42	191	49	52	50	140	66	58	50	132

Table 6: Occupancy Levels by Location: January 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	24	27	23	235	47	36	33	247	29	30	27	259	24	21	20	445
Northern Ireland	19	18	18	48	33	30	29	57	21	27	28	17	17	15	13	61
Scotland	17	26	19	36	35	36	34	107	25	28	28	66	23	23	24	84
Wales	26	26	26	36	38	34	29	19	19	19	16	23	18	17	18	73
UK	23	27	23	355	44	36	33	430	28	29	26	365	23	21	20	663

b: Percentage Bedroom Occupancy

England	33	38	31	235	63	55	52	247	43	45	40	259	36	33	32	445
Northern Ireland	28	27	23	48	53	48	43	57	36	44	42	17	23	21	19	61
Scotland	27	38	28	36	50	52	49	107	40	43	42	66	31	33	33	84
Wales	36	36	34	36	57	54	48	19	35	40	28	23	26	26	25	73
UK	32	38	31	355	60	54	51	430	42	44	40	365	34	32	31	663

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): Jan 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	13	13	20	5	18	20	14	143	19	19	16	266	23	29	25	173	24	26	21	93	42	31	29	396
Northern Ireland	8	-	-	-	12	9	12	54	12	19	13	46	19	22	18	24	26	24	23	13	36	31	31	44
Scotland	10	-	-	-	20	21	23	57	24	23	25	47	22	28	26	41	27	26	29	34	33	33	32	109
Wales	-	-	-	-	12	12	11	19	13	12	11	48	25	16	20	22	26	25	33	12	29	29	28	50
UK	12	13	20	8	18	19	15	273	19	19	17	407	23	28	25	260	25	26	23	152	40	31	29	599

B: Percentage Bedroom Occupancy

England	17	24	33	5	26	28	20	143	27	28	24	266	33	42	36	173	34	36	29	93	60	49	44	396
Northern Ireland	10	-	-	-	15	12	16	54	18	30	18	46	31	38	29	24	45	39	35	13	57	48	45	44
Scotland	15	-	-	-	37	36	34	57	38	41	40	47	33	41	37	41	40	41	46	34	44	46	44	109
Wales	-	-	-	-	19	22	17	19	20	18	17	48	37	26	32	22	40	41	43	12	44	45	41	50
UK	17	22	33	8	27	28	21	273	28	29	25	407	33	41	36	260	36	37	32	152	56	48	44	599

- 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)