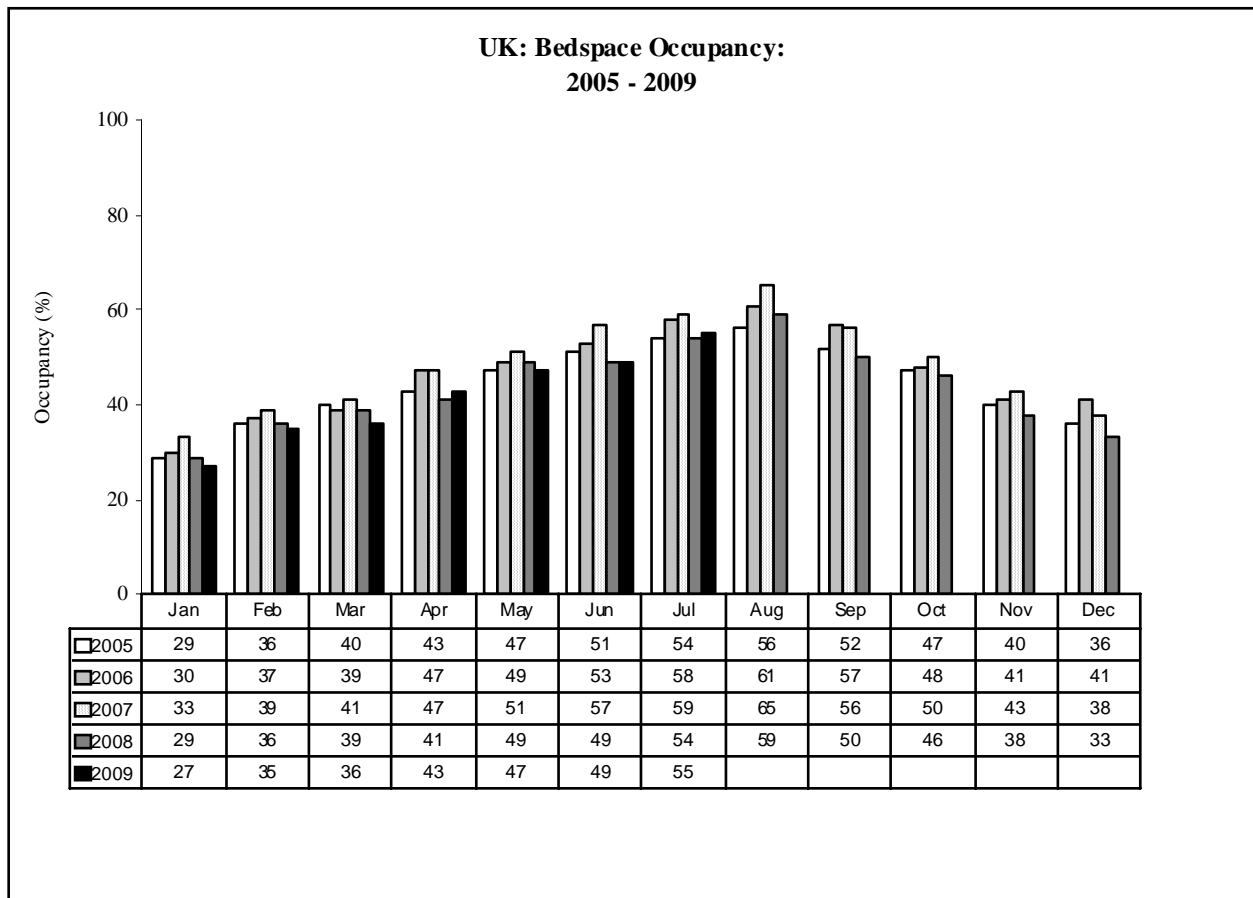


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

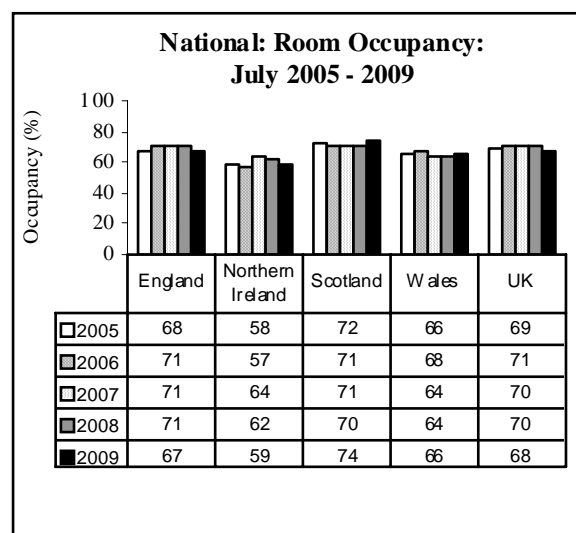
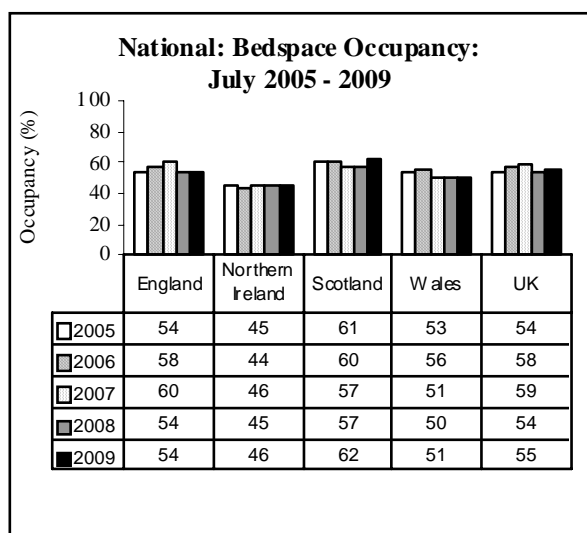
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

JULY 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 July 2009 was 55%, one percentage point higher than in July 2008. At 68%, room occupancy was 2 percentage points lower than in July 2008.



- Bedspace occupancy varied from 62% in Scotland to 46% in Northern Ireland, while room occupancy varied from 74% in Scotland to 59% in Northern Ireland.
- When compared with July 2008, both room and bedspace occupancy rose in Scotland (by 5 and 4 percentage points respectively) and Wales. In Northern Ireland bedspace occupancy rose by 1 percentage point but room occupancy fell by 3, while in England, bedspace occupancy remained unchanged but room occupancy fell by 4 percentage points.
- When compared with four years earlier, occupancy levels in Scotland and Northern Ireland had risen slightly. In Wales bedspace occupancy had fallen (by 2 percentage points) with room occupancy remaining unchanged, while in England bedspace occupancy was as in July 2008 but room occupancy had fallen slightly.
- Bedspace occupancy by non-UK residents remained as in July 2008 in England and Wales but fell in Northern Ireland (comparable figures for Scotland are no longer collected - (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

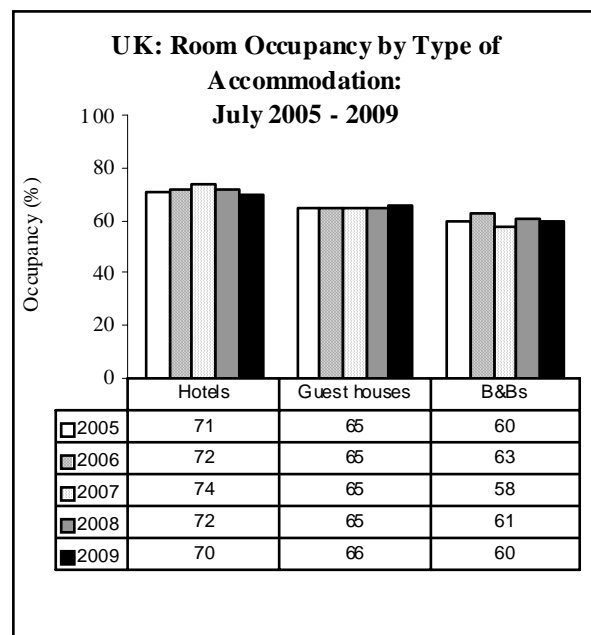
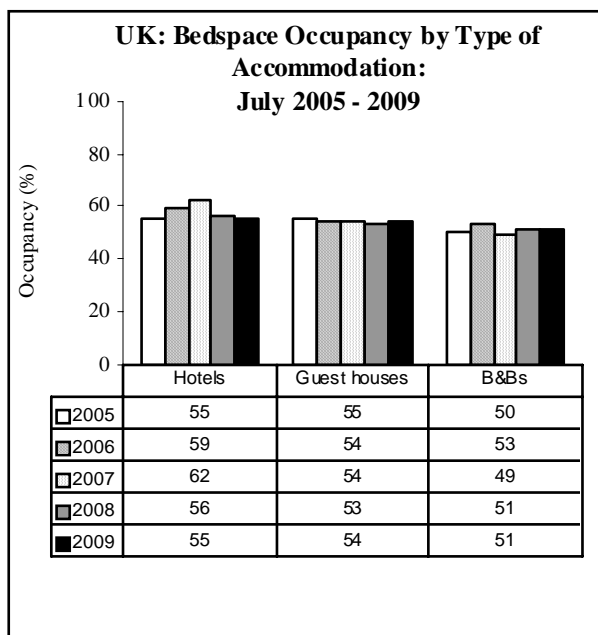
Table 1: Occupancy Levels: July 2007 – 2009

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	60	54	54	71	71	67	891	1073	1265
Northern Ireland	46	45	46	64	62	59	195	204	149
Scotland	57	57	62	71	70	74	427	393	388
Wales	51	50	51	64	64	66	200	204	185
UK	59	54	55	70	70	68	1713	1874	1987

Table 2: UK/Non-UK Occupancy Levels: July 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	44	44	46	9	8	8	15	13	14	17	15	14	891	1073	1265
Northern Ireland	32	29	31	14	16	15	36	40	36	30	35	33	195	204	149
Scotland	41	**	**	13	**	**	24	**	**	24	**	**	427	393	388
Wales	45	41	44	5	5	5	10	**	**	10	11	10	200	204	185
UK	43	44	46	9	8	8	16	14	14	18	15	14	1713	1874	1987

** figures not available



- When compared with July 2008, occupancy levels in guest houses rose slightly. In bed and breakfast establishments bedspace occupancy remained unchanged while room occupancy fell slightly while in hotels both measures of occupancy fell (see Table 3).
- When compared with July 2008, room occupancy fell in all size categories except for those establishments in the 4-10 letting bedrooms category where it remained unchanged. Bedspace occupancy remained as in July 2008 in the smallest (less than 4 letting bedrooms) and largest (more than 100 letting bedrooms) categories, rose in establishments with 4-10, 11-25 and 51-100 letting bedrooms but fell in those with 26-50 letting bedrooms (see Table 5).
- When compared with July 2008, occupancy levels in seaside and country/village locations rose (by 4 percentage points in the latter). In small town locations, bedspace occupancy also rose but room occupancy fell (by 3 percentage points), while in city/large town locations both room and bedspace occupancy fell (by 5 and 3 percentage points respectively) (see Table 6).
- The most expensive establishments (those with a maximum tariff of more than £60.00) experienced a 4 percentage point rise in bedspace occupancy with room occupancy remaining unchanged from the previous year. Room occupancy rose slightly in establishments in the £50.00-£59.99 tariff band with bedspace falling slightly. All other tariff bands saw a fall in both measures of occupancy except for those establishments in the £30.00-£39.99 tariff band where room occupancy remained as in July 2008 (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	64	56	54	75	73	69	302	333	383
Northern Ireland	47	47	51	69	67	64	70	72	50
Scotland	58	57	62	73	71	76	229	238	228
Wales	53	53	55	68	69	71	101	103	88
UK	62	56	55	74	72	70	702	746	749
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	54	53	54	64	65	66	170	267	312
Northern Ireland	43	37	33	58	47	45	24	23	17
Scotland	57	57	61	69	68	71	76	68	69
Wales	57	50	51	66	60	60	36	39	41
UK	54	53	54	65	65	66	306	397	439
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	49	51	51	59	62	60	419	472	568
Northern Ireland	40	40	38	48	46	43	101	109	82
Scotland	55	59	62	62	65	68	122	87	91
Wales	38	39	39	44	48	48	63	62	56
UK	49	51	51	58	61	60	705	730	797

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: July 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	63	52	51	58	58	58	69	73	68	73	67	67	12	15	16	18	11	11	16	16	15	18	13	13
Northern Ireland	48	49	46	45	43	46	60	59	57	65	59	59	37	39	38	39	45	38	31	37	35	32	39	35
Scotland	60	60	65	55	55	60	68	67	74	73	70	75	21	**	**	26	**	**	22	**	**	26	**	**
Wales	55	55	56	48	47	48	64	64	65	64	64	66	8	**	**	12	**	**	9	11	9	11	12	11
UK	62	53	53	57	57	57	68	71	68	72	67	68	14	15	16	19	12	12	17	16	15	19	13	13

** figures not available

Table 5: Occupancy Levels by Size: July 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	41	46	44	428	50	53	54	438	58	50	50	174	64	59	56	102	66	61	60	66	71	55	54	57
Northern Ireland	32	31	30	68	44	44	43	47	46	41	37	19	50	45	46	13	48	47	47	13	48	51	57	12
Scotland	52	54	60	76	51	53	57	103	55	54	59	73	59	59	63	51	66	62	69	36	62	58	64	48
Wales	42	35	40	55	50	51	50	60	51	49	55	25	52	53	51	24	57	54	57	13	60	62	63	8
UK	42	46	46	627	50	53	54	648	57	50	51	291	62	58	56	190	65	60	61	128	69	56	56	125

B: Percentage Bedroom Occupancy

England	50	56	52	428	60	64	64	438	70	63	61	174	76	71	70	102	81	77	73	66	77	77	72	57
Northern Ireland	41	36	36	68	55	52	51	47	65	57	52	19	66	57	53	13	71	68	64	13	72	80	70	12
Scotland	59	61	67	76	59	65	71	103	68	65	70	73	75	71	74	51	81	78	85	36	81	75	80	48
Wales	47	44	47	55	59	61	60	60	63	63	68	25	69	71	66	24	70	70	73	13	79	81	84	8
UK	51	56	53	627	60	64	64	648	69	63	62	291	75	71	70	190	80	77	74	128	78	77	74	125

Table 6: Occupancy Levels by Location: July 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	58	56	56	298	69	59	55	224	56	51	51	265	48	48	52	473
Northern Ireland	53	48	48	36	46	45	46	49	38	45	51	12	43	41	43	52
Scotland	58	60	64	59	64	59	63	111	55	54	56	85	52	54	62	133
Wales	54	56	59	44	61	60	52	19	48	45	51	21	49	46	47	101
UK	58	56	57	437	67	59	56	403	55	51	52	383	49	49	53	759

B: Percentage Bedroom Occupancy

England	68	67	67	298	78	78	71	224	70	68	63	265	59	59	62	473
Northern Ireland	66	60	62	36	67	66	58	49	62	62	65	12	54	49	53	52
Scotland	68	70	73	59	80	75	78	111	72	69	72	85	62	64	71	133
Wales	68	69	71	44	81	77	74	19	63	62	71	21	58	58	57	101
UK	68	67	68	437	78	77	72	403	70	68	65	383	59	59	63	759

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	45	51	45	6	43	39	37	138	52	51	50	310	54	57	54	194	55	58	55	97	59	55	58	414
Northern Ireland	-	-	-	-	35	35	34	47	49	48	40	36	42	41	38	17	50	44	45	9	48	47	52	38
Scotland	38	-	-	-	51	56	56	57	51	51	55	87	58	55	57	46	58	60	61	40	60	59	66	154
Wales	-	-	-	-	40	35	37	31	50	45	45	51	53	53	46	23	57	48	57	15	55	57	58	64
UK	44	47	44	9	44	41	39	273	52	51	50	484	54	56	54	280	55	57	56	161	59	55	59	670

B: Percentage Bedroom Occupancy

England	52	61	55	6	53	48	46	138	63	61	60	310	64	70	65	194	68	67	68	97	75	72	71	414
Northern Ireland	-	-	-	-	43	40	40	47	63	60	50	36	59	57	49	17	68	65	55	9	70	67	66	38
Scotland	49	-	-	-	69	70	62	57	62	68	78	87	73	69	69	46	71	71	70	40	72	71	79	154
Wales	-	-	-	-	48	42	41	31	57	55	56	51	67	66	61	23	75	67	68	15	70	74	74	64
UK	51	56	55	9	55	50	48	273	62	62	62	484	65	69	65	280	69	67	68	161	74	72	72	670

- 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)