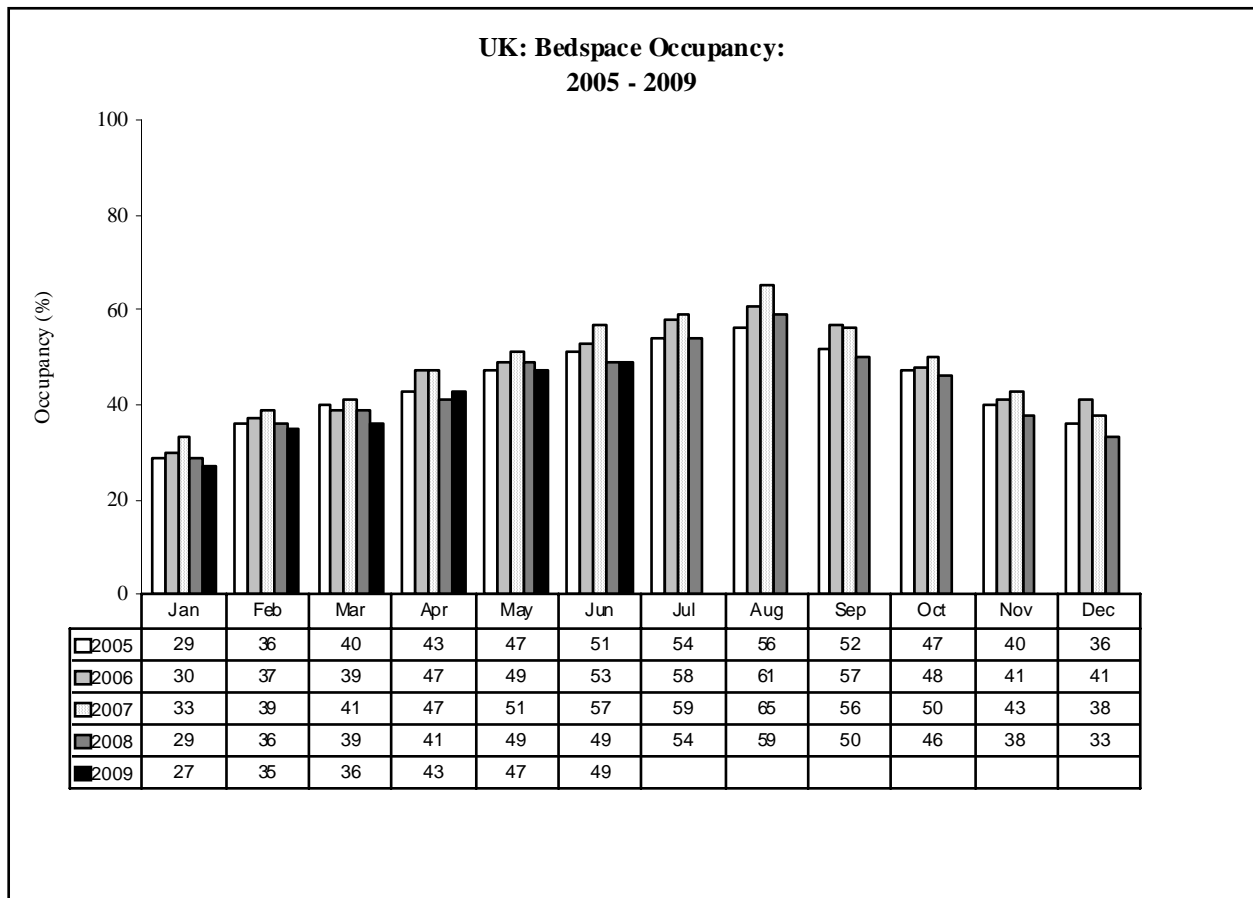


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

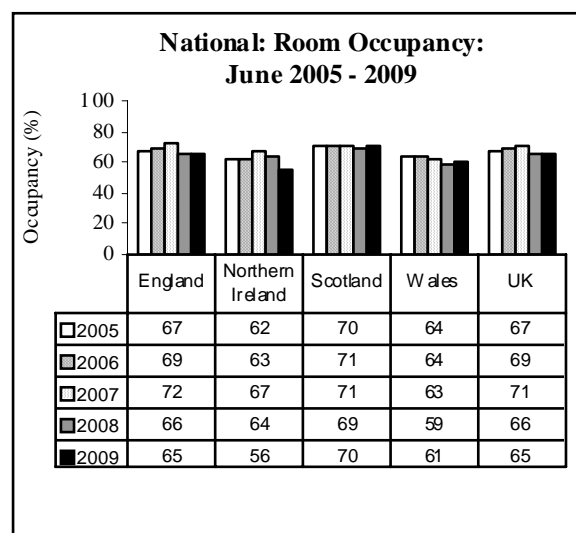
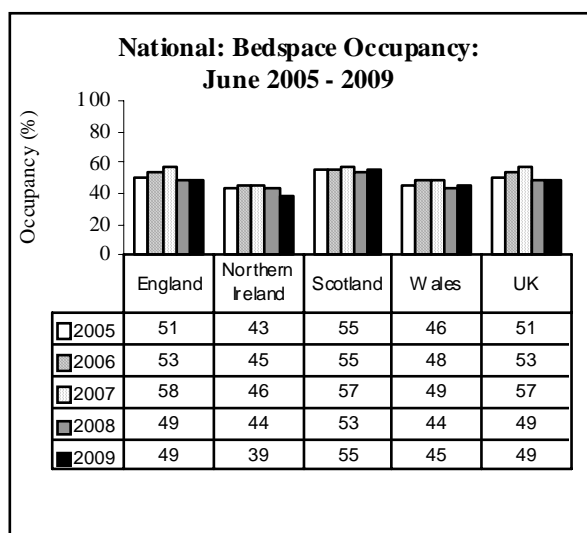
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

JUNE 2009



- Almost 2,050 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 June 2009 was 49%, the same as in June 2008. At 65%, room occupancy was 1 percentage point lower than in June 2008.

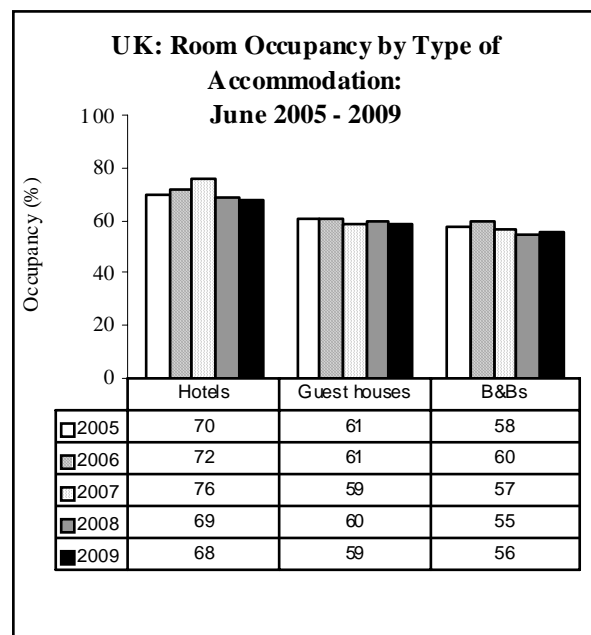
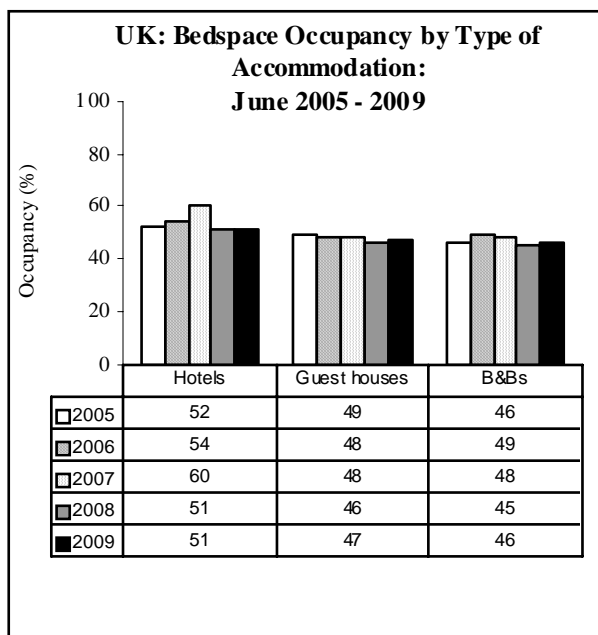


- Bedspace occupancy varied from 55% in Scotland to 39% in Northern Ireland, while room occupancy varied from 70% in Scotland to 56% in Northern Ireland.
- When compared with June 2008, both room and bedspace occupancy rose in Scotland and Wales but fell in Northern Ireland (by 5 percentage points for bedspace occupancy and by 8 for room occupancy). In England, bedspace occupancy remained unchanged but room occupancy fell slightly.
- When compared with four years earlier, occupancy levels in Scotland remained unchanged while those in England, Wales and Northern Ireland all fell, with the greatest fall (of 6 percentage points) being for room occupancy in Northern Ireland.
- Bedspace occupancy by non-UK residents remained as in June 2008 in Wales but fell in England 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	58	49	49	72	66	65	951	941	1303
Northern Ireland	46	44	33	67	64	56	195	195	159
Scotland	57	53	55	71	69	70	427	395	383
Wales	49	44	45	63	59	61	204	202	199
UK	57	49	49	71	66	65	1777	1733	2044

	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	41	39	42	8	8	7	14	13	14	16	17	14	951	941	1303
Northern Ireland	33	26	25	13	18	14	36	41	38	29	40	36	195	195	159
Scotland	41	**	**	13	**	**	24	**	**	24	**	**	427	395	383
Wales	43	38	39	3	3	3	8	**	**	7	8	8	204	202	199
UK	41	39	41	8	8	7	15	14	14	17	17	14	1777	1733	2044

** figures not available



- When compared with June 2008, occupancy levels in bed and breakfast establishments rose slightly. In hotels and guest houses, room occupancy fell, also slightly. Bedspace occupancy remained unchanged in hotels but fell slightly in guest houses (see Table 3).
- Establishments with 26-50 letting bedrooms saw a rise in occupancy levels when compared with June 2008 while those establishments in the two largest size categories (51-100 and more than 100 letting bedrooms) experienced a fall in both measures of occupancy (of up to 3 percentage points for bedspace occupancy and 5 for room occupancy). Bedspace occupancy rose slightly in establishments with 4-10 and 11-25 letting bedrooms with room occupancy remaining unchanged in the former size category and falling slightly in the latter. The smallest establishments (1-3 letting bedrooms) saw a slight fall in bedspace occupancy with room occupancy remaining unchanged (see Table 5).
- When compared with June 2008, occupancy levels in country/village locations rose, as did room occupancy in seaside locations. In the latter location, bedspace occupancy remained as in June 2008. In urban locations (city/large towns and small towns), occupancy levels fell (see Table 6).
- The most expensive establishments (those with a maximum tariff of more than £60.00) experienced a slight rise in bedspace occupancy with room occupancy remaining unchanged from the previous year. In all other tariff bands, occupancy levels fell with the greatest fall (of 6 percentage points) being in bedspace occupancy in the £50.00- £59.99 tariff band (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	61	51	50	77	69	68	321	313	404
Northern Ireland	51	48	45	76	73	65	39	72	52
Scotland	58	54	56	73	72	72	229	239	226
Wales	51	47	48	67	65	68	107	103	96
UK	60	51	51	76	69	68	696	727	778
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	47	46	46	58	61	58	188	248	313
Northern Ireland	38	34	26	51	45	34	25	23	19
Scotland	57	51	54	69	63	67	76	67	71
Wales	49	40	47	58	52	59	38	38	39
UK	48	46	47	59	60	59	327	376	442
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	48	45	46	58	56	57	442	380	584
Northern Ireland	32	32	23	42	39	30	101	100	88
Scotland	55	49	54	62	55	61	122	89	86
Wales	38	32	29	43	40	36	59	61	64
UK	48	45	46	57	55	56	724	630	822

	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	59	48	46	56	52	53	68	70	67	76	62	64	11	15	16	17	12	11	14	18	15	19	16	13
Northern Ireland	49	47	45	40	42	35	64	61	57	65	65	55	35	41	37	38	42	41	30	40	35	30	40	39
Scotland	60	55	59	55	51	54	68	64	68	73	71	71	21	**	**	26	**	**	22	**	**	26	**	**
Wales	53	48	50	45	40	42	62	59	61	63	59	61	6	**	**	11	**	**	6	7	7	9	9	9
UK	59	49	48	55	51	52	68	68	67	74	63	65	13	16	16	18	13	12	15	18	15	19	16	13

** figures not available

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	42	41	40	448	46	47	46	436	54	46	46	180	61	50	52	105	68	58	57	69	64	51	47	65
Northern Ireland	27	24	17	76	33	39	31	26	46	42	33	20	52	43	36	13	53	51	43	12	53	50	53	12
Scotland	52	45	51	72	51	47	53	107	55	49	52	69	59	57	53	46	66	61	65	39	62	57	56	49
Wales	38	31	28	60	47	38	43	59	48	46	49	27	51	50	47	25	56	48	49	17	58	57	60	11
UK	43	41	40	656	47	46	47	628	54	46	47	296	60	51	52	189	67	58	57	137	63	52	49	137
B: Percentage Bedroom Occupancy																								
England	50	50	49	448	57	58	58	436	67	60	59	180	77	63	68	105	82	74	73	69	80	78	71	65
Northern Ireland	35	30	22	76	44	48	40	26	72	64	49	20	71	63	49	13	80	78	63	12	82	77	75	12
Scotland	59	52	59	72	59	61	65	107	68	64	66	69	75	72	67	46	81	79	83	39	81	81	77	49
Wales	43	38	34	60	57	49	53	59	61	60	66	27	70	68	66	25	72	70	73	17	77	80	80	11
UK	51	49	49	656	57	58	58	628	67	61	60	296	76	65	67	189	81	75	74	137	80	78	72	137

Table 6: Occupancy Levels by Location: June 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	52	48	48	301	65	53	50	233	54	50	48	272	50	44	47	492
Northern Ireland	48	41	36	36	52	47	44	48	39	42	39	16	35	37	33	59
Scotland	58	52	56	62	64	57	58	115	55	50	50	80	52	48	53	126
Wales	51	51	53	43	58	49	51	19	45	39	43	23	46	40	40	93
UK	53	49	49	442	64	53	51	415	53	49	48	391	50	44	47	770

B: Percentage Bedroom Occupancy

England	64	60	63	301	80	75	71	233	68	66	64	272	62	56	58	492
Northern Ireland	67	55	51	36	75	72	63	48	67	66	57	16	46	45	44	59
Scotland	68	65	67	62	80	77	77	115	72	67	67	80	62	60	63	126
Wales	66	66	68	43	80	73	74	19	60	59	64	23	58	52	52	93
UK	65	61	64	442	80	75	72	415	68	66	64	391	62	56	58	770

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	-	27	6	37	32	32	146	48	45	41	317	48	53	50	195	57	55	48	94	57	50	51	440
Northern Ireland	-	-	-	-	33	32	21	50	46	40	34	43	52	37	28	16	53	41	43	11	53	49	45	37
Scotland	38	37	-	-	51	51	47	69	51	45	51	79	58	51	57	42	58	57	56	42	60	56	60	147
Wales	-	12	-	-	37	28	26	29	46	40	38	48	49	43	44	20	55	48	45	15	54	50	53	63
UK	33	33	27	6	39	34	33	294	48	45	42	487	50	52	50	273	57	55	49	162	57	51	52	687

B: Percentage Bedroom Occupancy

England	40	-	36	6	47	43	41	146	57	56	51	317	61	66	63	195	71	63	63	94	71	69	68	440
Northern Ireland	-	-	-	-	44	40	27	50	72	54	52	43	71	54	41	16	80	60	54	11	82	75	65	37
Scotland	49	44	-	-	69	67	57	69	62	66	69	79	73	71	69	42	71	70	68	42	72	69	75	147
Wales	-	-	-	-	44	36	32	29	53	51	48	48	63	56	56	20	75	62	61	15	71	71	72	63
UK	41	38	36	6	50	46	42	294	58	57	53	487	63	66	63	273	71	64	63	162	71	69	69	687

- 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)