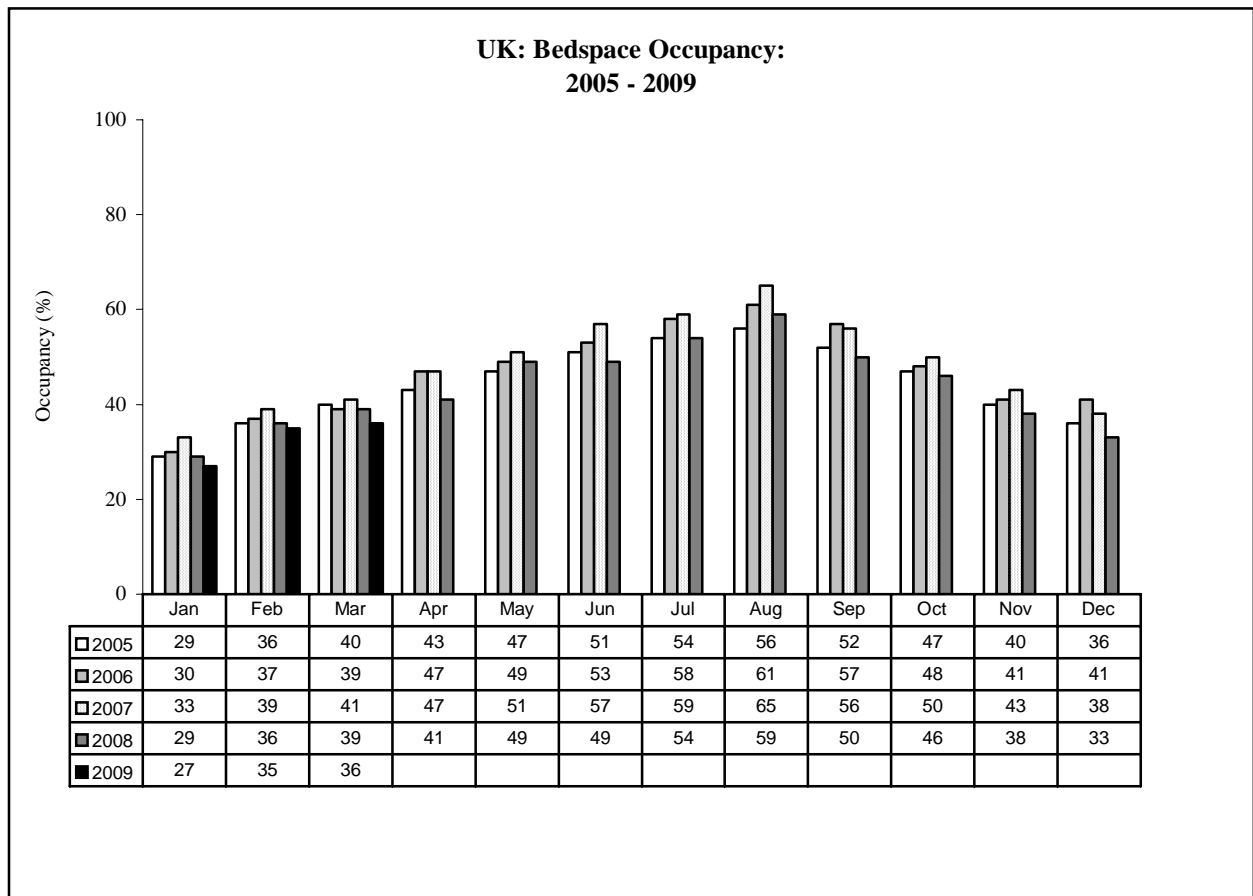


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

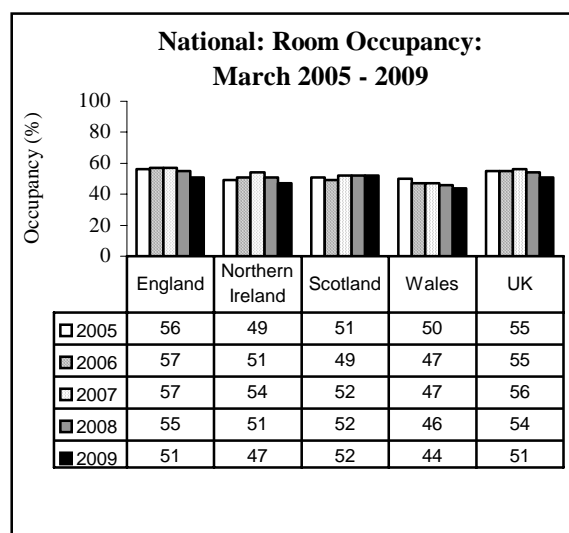
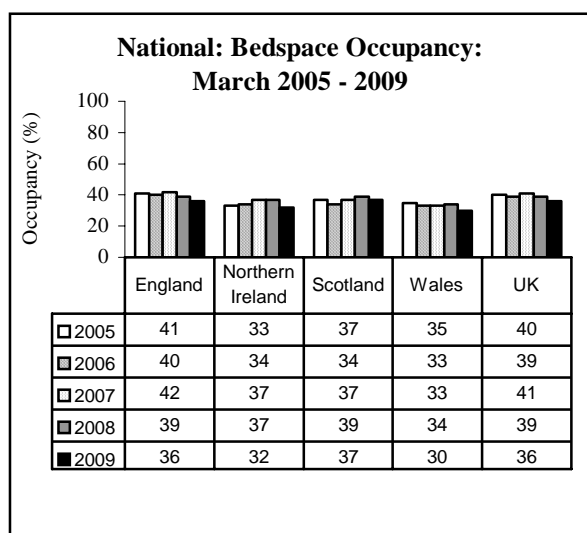
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

MARCH 2009



- Around 1950 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 March 2009 was 36%, 3 percentage points lower than in March 2008. At 51%, room occupancy was also 3 percentage points lower than in March 2008.



- Bedspace occupancy varied from 37% in Scotland to 30% in Wales, while room occupancy varied from 52% in Scotland to 44% in Wales.
- When compared with March 2008, both room and bedspace occupancy fell in England, Wales and Northern Ireland, with the greatest fall (of 5 percentage points) being in bedspace occupancy in Northern Ireland. In Scotland, room occupancy remained at its 2008 level but bedspace occupancy fell (by 2 percentage points).
- When compared with four years earlier, room occupancy in Scotland had risen slightly and bedspace occupancy was as in March 2005. In the other three countries, both measures of occupancy had fallen over this time.
- Bedspace occupancy by non-UK residents rose in Northern Ireland when compared with March 2008 and remained unchanged in England and Wales (comparable figures for Scotland are no longer collected - (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

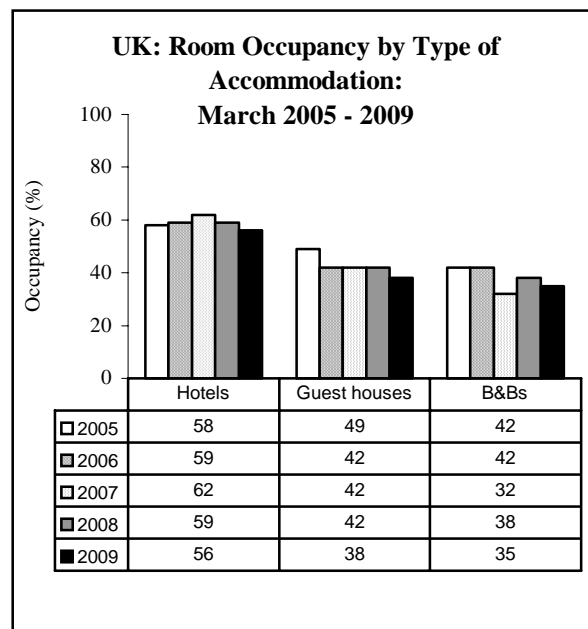
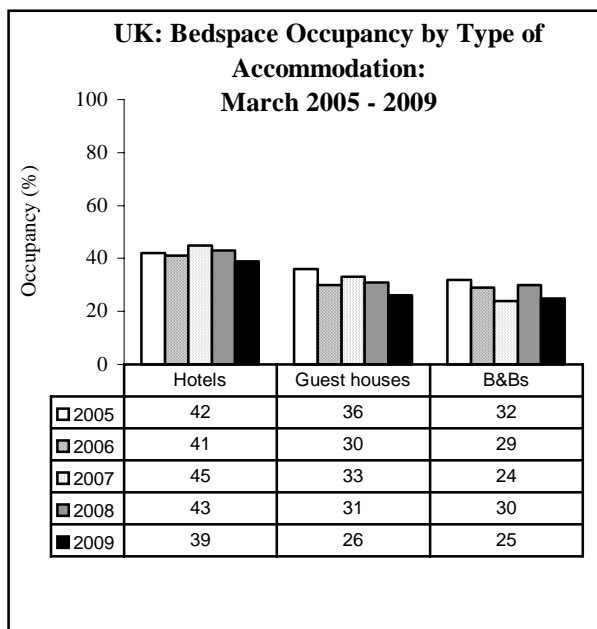
Table 1: Occupancy Levels: March 2007 – 2009

| | Bedspace occupancy % | | | Room occupancy % | | | Sample size | | |
|------------------|----------------------|------|------|------------------|------|------|-------------|------|------|
| | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 |
| England | 42 | 39 | 36 | 57 | 55 | 51 | 911 | 1183 | 1242 |
| Northern Ireland | 37 | 37 | 32 | 54 | 51 | 47 | 190 | 196 | 183 |
| Scotland | 37 | 39 | 37 | 52 | 52 | 52 | 361 | 367 | 345 |
| Wales | 33 | 34 | 30 | 47 | 46 | 44 | 190 | 177 | 175 |
| UK | 41 | 39 | 36 | 56 | 54 | 51 | 1652 | 1923 | 1945 |

Table 2: UK/Non-UK Occupancy Levels: March 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 | 35 | 31 | 29 | 7 | 3 | 3 | 13 | 8 | 7 | 17 | 10 | 9 | 911 | 1183 | 1242 |
| Northern Ireland | 29 | 28 | 21 | 8 | 10 | 11 | 28 | 28 | 34 | 22 | 26 | 33 | 190 | 196 | 183 |
| Scotland | 29 | 0 | 0 | 3 | ** | ** | 11 | ** | ** | 11 | ** | ** | 361 | 367 | 345 |
| Wales | 29 | 29 | 25 | 1 | 1 | 1 | 4 | ** | ** | 5 | 5 | 5 | 190 | 177 | 175 |
| UK | 34 | 31 | 29 | 6 | 3 | 3 | 12 | 8 | 8 | 15 | 10 | 9 | 1652 | 1923 | 1945 |

** figures not available



- When compared with March 2008, occupancy levels in all types of accommodation fell – by up to 5 percentage points (see Table 3).
- All size categories saw a fall in both measures of occupancy when compared with March 2008. The greatest falls (of 8 percentage points) were for both room and bedspace occupancy in the largest size category (those establishments with more than 100 letting bedrooms) while the smallest fall (of only 1 percentage point) was seen in two size categories – those establishments with 11-25 and 51-100 letting bedrooms (room and bedspace occupancy in the former and bedspace occupancy only in the latter) (see Table 5).
- Occupancy levels in all types of locations again fell when compared with the previous year, with the greatest falls (of 5 percentage points) being for both measures of occupancy in seaside and small town locations. Country/village locations experienced the smallest fall (of only 1 percentage point) (see Table 6).
- When compared with March 2008, occupancy levels in all tariff bands fell with the greatest fall (of 9 percentage points) being for 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: March 2007 – 2009

| a: Hotels | | | | | | | | | |
|--|-------------------------|------|------|---------------------|------|------|--------------------|------|------|
| | Bedspace occupancy % | | | Room occupancy % | | | <i>Sample size</i> | | |
| | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 |
| England | 47 | 43 | 39 | 64 | 60 | 56 | 333 | 397 | 363 |
| Northern Ireland | 44 | 43 | 37 | 67 | 60 | 55 | 69 | 67 | 71 |
| Scotland | 41 | 43 | 41 | 58 | 58 | 57 | 202 | 234 | 214 |
| Wales | 38 | 39 | 37 | 53 | 54 | 52 | 104 | 86 | 88 |
| UK | 45 | 43 | 39 | 62 | 59 | 56 | 708 | 784 | 736 |
| b: Guest Houses | | | | | | | | | |
| | Bedspace occupancy % | | | Room occupancy % | | | <i>Sample size</i> | | |
| | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 |
| England | 35 | 32 | 27 | 44 | 43 | 39 | 172 | 278 | 301 |
| Northern Ireland | 21 | 26 | 21 | 30 | 35 | 29 | 23 | 28 | 22 |
| Scotland | 27 | 30 | 26 | 39 | 42 | 37 | 66 | 62 | 61 |
| Wales | 24 | 26 | 21 | 31 | 32 | 28 | 38 | 36 | 38 |
| UK | 33 | 31 | 26 | 42 | 42 | 38 | 299 | 404 | 422 |
| c: Bed & Breakfast Establishments | | | | | | | | | |
| | Bedspace occupancy % | | | Room occupancy % | | | <i>Sample size</i> | | |
| | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 | 2007 | 2008 | 2009 |
| England | 25 | 32 | 27 | 34 | 41 | 37 | 406 | 508 | 576 |
| Northern Ireland | 18 | 19 | 13 | 25 | 26 | 16 | 98 | 101 | 90 |
| Scotland | 19 | 22 | 21 | 26 | 27 | 30 | 93 | 71 | 70 |
| Wales | 20 | 21 | 17 | 29 | 27 | 24 | 48 | 55 | 49 |
| UK | 24 | 30 | 25 | 32 | 38 | 35 | 645 | 735 | 785 |

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: Mar 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 | 45 | 44 | 33 | 42 | 35 | 40 | 53 | 53 | 55 | 62 | 57 | 48 | 12 | 7 | 9 | 14 | 10 | 6 | 17 | 9 | 10 | 17 | 11 | 8 |
| Northern Ireland | 39 | 41 | 38 | 30 | 33 | 27 | 50 | 50 | 48 | 51 | 50 | 46 | 24 | 29 | 35 | 24 | 30 | 36 | 21 | 27 | 35 | 22 | 28 | 35 |
| Scotland | 39 | 44 | 41 | 35 | 35 | 35 | 47 | 52 | 49 | 53 | 52 | 54 | 11 | ** | ** | 12 | ** | ** | 12 | ** | ** | 12 | ** | ** |
| Wales | 37 | 40 | 34 | 29 | 29 | 27 | 45 | 49 | 42 | 46 | 44 | 44 | 3 | ** | ** | 6 | ** | ** | 3 | 5 | 4 | 6 | 5 | 5 |
| UK | 44 | 44 | 34 | 40 | 35 | 38 | 52 | 53 | 53 | 59 | 55 | 48 | 11 | 7 | 10 | 13 | 10 | 7 | 15 | 9 | 10 | 16 | 11 | 8 |

** figures not available

Table 5: Occupancy Levels by Size: March 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 | 27 | 22 | 428 | 29 | 31 | 27 | 435 | 40 | 36 | 35 | 152 | 43 | 42 | 38 | 106 | 44 | 48 | 48 | 64 | 57 | 45 | 36 | 57 |
| Northern Ireland | 44 | 13 | 6 | 80 | 21 | 25 | 23 | 25 | 18 | 34 | 28 | 28 | 38 | 37 | 29 | 19 | 45 | 47 | 34 | 21 | 47 | 48 | 47 | 10 |
| Scotland | 16 | 20 | 18 | 59 | 26 | 32 | 29 | 91 | 35 | 36 | 33 | 68 | 45 | 46 | 39 | 42 | 52 | 50 | 52 | 36 | 51 | 49 | 47 | 48 |
| Wales | 17 | 20 | 15 | 45 | 30 | 27 | 24 | 54 | 34 | 35 | 34 | 28 | 39 | 39 | 36 | 24 | 40 | 50 | 35 | 14 | 45 | 48 | 44 | 10 |
| UK | 20 | 25 | 21 | 612 | 29 | 31 | 27 | 605 | 39 | 36 | 35 | 276 | 43 | 42 | 38 | 191 | 45 | 48 | 47 | 135 | 55 | 46 | 38 | 125 |

B: Percentage Bedroom Occupancy

| | | | | | | | | | | | | | | | | | | | | | | | | |
|------------------|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|
| England | 27 | 35 | 30 | 428 | 40 | 41 | 37 | 435 | 51 | 48 | 48 | 152 | 59 | 57 | 52 | 106 | 59 | 65 | 62 | 64 | 74 | 69 | 58 | 57 |
| Northern Ireland | 67 | 17 | 8 | 80 | 30 | 33 | 30 | 25 | 25 | 51 | 41 | 28 | 56 | 54 | 42 | 19 | 69 | 63 | 51 | 21 | 80 | 64 | 71 | 10 |
| Scotland | 23 | 25 | 26 | 59 | 37 | 45 | 41 | 91 | 49 | 48 | 46 | 68 | 60 | 58 | 54 | 42 | 69 | 66 | 68 | 36 | 69 | 66 | 66 | 48 |
| Wales | 22 | 25 | 20 | 45 | 40 | 34 | 32 | 54 | 47 | 47 | 46 | 28 | 55 | 56 | 52 | 24 | 55 | 60 | 53 | 14 | 66 | 65 | 66 | 10 |
| UK | 27 | 33 | 28 | 612 | 39 | 41 | 37 | 605 | 50 | 48 | 47 | 276 | 59 | 57 | 52 | 191 | 60 | 65 | 62 | 135 | 73 | 68 | 60 | 125 |

Table 6: Occupancy Levels by Location: March 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 | 33 | 36 | 30 | 283 | 53 | 47 | 43 | 221 | 41 | 39 | 34 | 262 | 34 | 31 | 30 | 473 |
| Northern Ireland | 32 | 31 | 27 | 38 | 43 | 44 | 36 | 61 | 35 | 37 | 30 | 16 | 25 | 26 | 23 | 68 |
| Scotland | 33 | 36 | 36 | 53 | 48 | 45 | 45 | 111 | 33 | 36 | 32 | 73 | 31 | 34 | 30 | 108 |
| Wales | 36 | 39 | 34 | 43 | 48 | 47 | 42 | 19 | 31 | 33 | 28 | 23 | 29 | 29 | 25 | 90 |
| UK | 33 | 36 | 31 | 417 | 52 | 47 | 43 | 412 | 39 | 38 | 33 | 374 | 33 | 31 | 30 | 739 |

b: Percentage Bedroom Occupancy

| | | | | | | | | | | | | | | | | |
|------------------|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|
| England | 44 | 46 | 40 | 283 | 70 | 66 | 62 | 221 | 55 | 56 | 51 | 262 | 45 | 42 | 42 | 473 |
| Northern Ireland | 44 | 42 | 36 | 38 | 67 | 60 | 56 | 61 | 54 | 53 | 45 | 16 | 33 | 35 | 31 | 68 |
| Scotland | 43 | 49 | 46 | 53 | 64 | 62 | 63 | 111 | 50 | 49 | 49 | 73 | 42 | 44 | 40 | 108 |
| Wales | 48 | 49 | 44 | 43 | 70 | 66 | 65 | 19 | 49 | 50 | 43 | 23 | 38 | 37 | 36 | 90 |
| UK | 44 | 46 | 41 | 417 | 69 | 65 | 62 | 412 | 54 | 55 | 50 | 374 | 44 | 42 | 41 | 739 |

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): Mar 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 | 14 | 15 | 12 | 5 | 21 | 23 | 16 | 150 | 24 | 30 | 27 | 287 | 38 | 39 | 34 | 178 | 35 | 39 | 28 | 115 | 50 | 41 | 39 | 410 |
| Northern Ireland | 12 | 4 | - | - | 15 | 14 | 13 | 55 | 29 | 32 | 18 | 42 | 31 | 37 | 24 | 25 | 38 | 43 | 41 | 14 | 48 | 43 | 37 | 47 |
| Scotland | 8 | 21 | - | - | 33 | 31 | 30 | 75 | 31 | 33 | 31 | 65 | 37 | 37 | 37 | 46 | 38 | 39 | 38 | 36 | 42 | 44 | 41 | 121 |
| Wales | - | - | - | - | 19 | 21 | 17 | 29 | 30 | 27 | 18 | 51 | 40 | 36 | 29 | 26 | 37 | 42 | 43 | 13 | 40 | 41 | 39 | 56 |
| UK | 13 | 16 | 12 | 5 | 22 | 24 | 18 | 309 | 25 | 30 | 27 | 445 | 38 | 39 | 34 | 275 | 36 | 39 | 30 | 178 | 48 | 41 | 39 | 634 |

B: Percentage Bedroom Occupancy

| | | | | | | | | | | | | | | | | | | | | | | | | |
|------------------|----|----|----|---|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|
| England | 17 | 19 | 16 | 5 | 29 | 31 | 23 | 150 | 33 | 39 | 36 | 287 | 49 | 50 | 47 | 178 | 46 | 50 | 41 | 115 | 66 | 59 | 54 | 410 |
| Northern Ireland | 23 | - | - | - | 19 | 19 | 16 | 55 | 43 | 46 | 27 | 42 | 47 | 50 | 36 | 25 | 59 | 56 | 56 | 14 | 72 | 60 | 56 | 47 |
| Scotland | 16 | 31 | - | - | 50 | 46 | 41 | 75 | 46 | 52 | 47 | 65 | 55 | 52 | 53 | 46 | 51 | 51 | 51 | 36 | 54 | 57 | 56 | 121 |
| Wales | - | - | - | - | 26 | 27 | 26 | 29 | 40 | 35 | 25 | 51 | 54 | 46 | 43 | 26 | 54 | 56 | 59 | 13 | 56 | 56 | 54 | 56 |
| UK | 17 | 21 | 16 | 5 | 32 | 32 | 25 | 309 | 36 | 40 | 37 | 445 | 50 | 50 | 47 | 275 | 47 | 51 | 44 | 178 | 64 | 59 | 54 | 634 |

- 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)