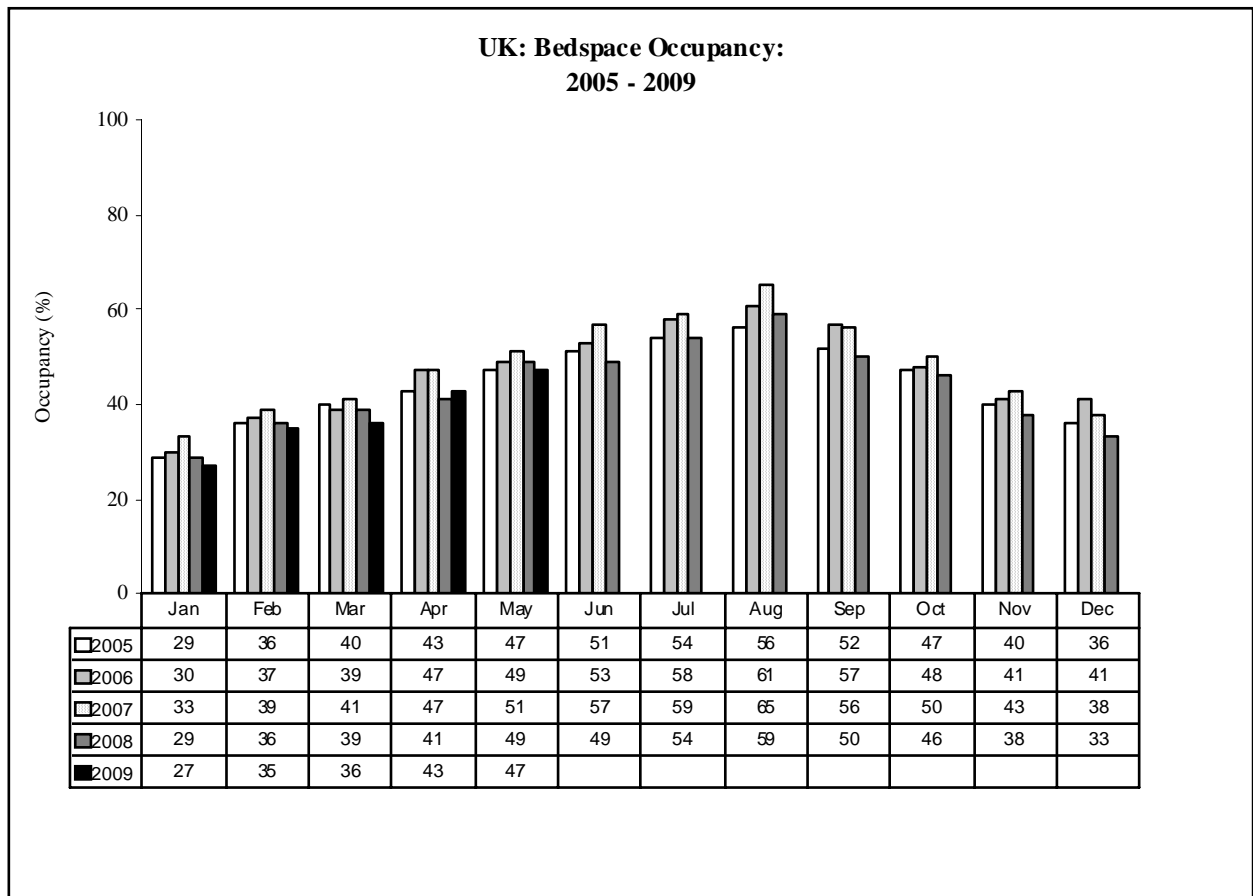


# UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

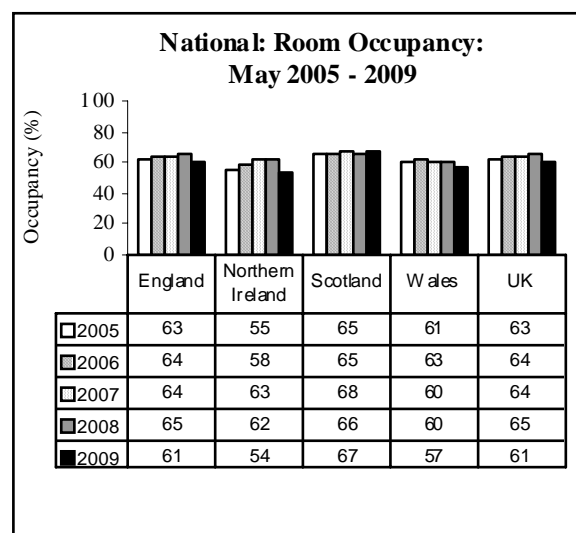
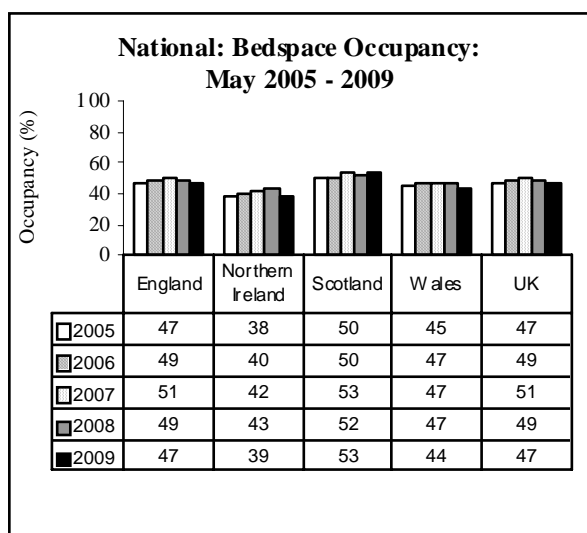
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

## MAY 2009



- Over 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 May 2009 was 47%, 2 percentage points lower than in May 2008. At 61%, room occupancy was 4 percentage points lower than in May 2008.

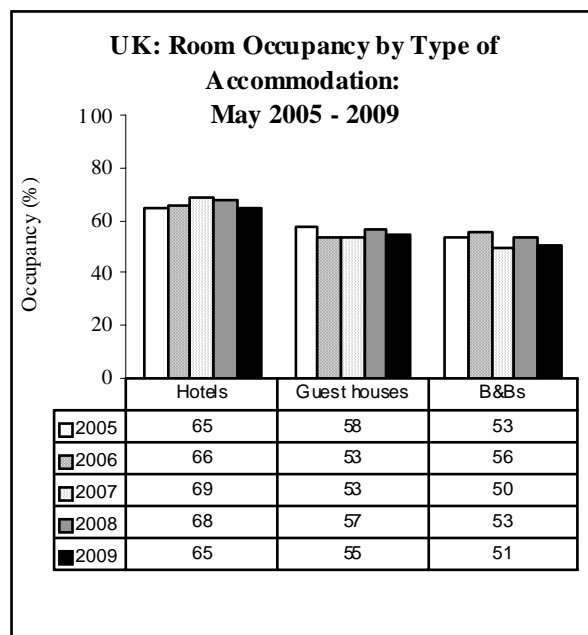
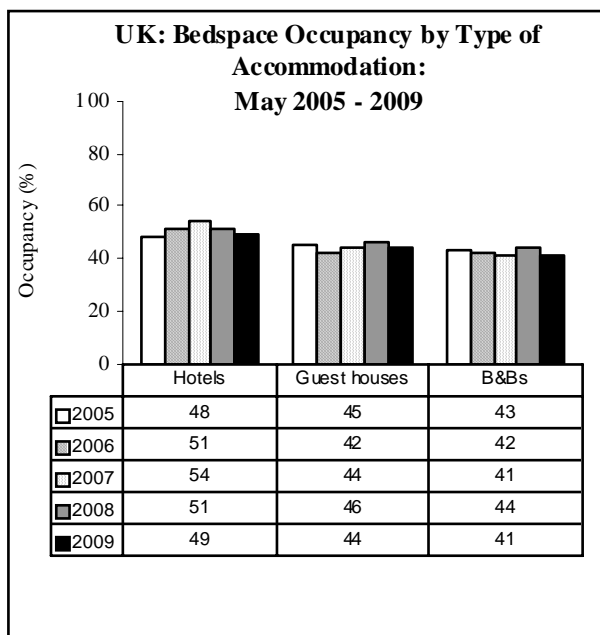


- Bedspace occupancy varied from 53% in Scotland to 39% in Northern Ireland, while room occupancy varied from 67% in Scotland to 54% in Northern Ireland.
- When compared with May 2008, both room and bedspace occupancy rose slightly in Scotland but fell in England, Wales and Northern Ireland – by up to 8 percentage points (room occupancy in Northern Ireland).
- When compared with four years earlier, Scotland saw a rise in occupancy levels – of 3 percentage points for bedspace occupancy and 2 for room occupancy. In Northern Ireland, bedspace occupancy had risen (by 1 percentage point) but room occupancy had fallen by a similar amount. In England, bedspace occupancy was the same as in May 2005 but room occupancy was 2 percentage points lower, while in Wales both measures of occupancy had fallen (by 1 percentage point for bedspace occupancy and by 4 for room occupancy).
- Bedspace occupancy by non-UK residents remained as in May 2008 in England but fell in Northern Ireland and 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	51	49	47	64	65	61	918	1126	1318
Northern Ireland	42	43	39	63	62	54	196	197	183
Scotland	53	52	53	68	66	67	414	359	374
Wales	47	47	44	60	60	57	200	195	183
UK	51	49	47	64	65	61	1728	1877	2058

	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	36	39	40	12	6	6	20	11	9	25	14	13	918	1126	1318
Northern Ireland	30	28	27	12	15	12	34	36	32	28	35	30	196	197	183
Scotland	40	**	**	10	**	**	20	**	**	19	**	**	414	359	374
Wales	43	42	40	3	3	2	6	**	**	6	8	6	200	195	183
UK	37	39	40	11	6	6	19	11	9	23	14	13	1728	1877	2058

\*\* figures not available



- When compared with May 2008, occupancy levels in all types of accommodation fell (by 2 or 3 percentage points) (see Table 3).
- With the exception of those establishments with 4-10 letting bedrooms (where bedspace occupancy remained as in May 2008 and room occupancy fell slightly) and those with 26-50 letting bedrooms (where bedspace occupancy rose slightly and room occupancy fell by 3 percentage points), all size categories saw a fall in both measures of occupancy. The smallest falls (of 1 and 2 percentage points) were experienced by the smallest (1-3 rooms) and largest (over 100 rooms) establishments (see Table 5).
- In city/large town and country/village locations, bedspace occupancy levels remained as in May 2008 but room occupancy fell (by 2 percentage points in each case). In seaside and small town locations both measures of occupancy fell (see Table 6).
- Occupancy levels fell in all tariff bands, with the greatest falls (of 11 percentage points for bedspace occupancy and 8 for room occupancy) being in the cheapest establishments (those with a maximum charge of less than £20.00 (see Table 7 and note 5a, page 7 (sample sizes))). The only exception was in the most expensive establishments (those with a charge of £60.00 and over) which saw a slight increase in bedspace occupancy of 1 percentage point.

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

<b>a: Hotels</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	55	51	49	69	68	64	300	358	404
Northern Ireland	46	48	43	72	70	61	70	71	64
Scotland	54	53	54	71	69	69	218	222	222
Wales	50	51	48	63	66	63	101	98	86
UK	54	51	49	69	68	65	689	749	776
<b>b: Guest Houses</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	42	45	43	51	57	54	183	265	326
Northern Ireland	38	34	29	52	45	35	26	27	22
Scotland	50	51	52	63	63	63	76	58	65
Wales	48	44	42	58	54	51	38	37	39
UK	44	46	44	53	57	55	323	387	452
<b>c: Bed &amp; Breakfast Establishments</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	40	45	44	49	55	52	435	503	586
Northern Ireland	32	33	27	40	39	33	100	99	97
Scotland	49	46	50	57	51	57	120	79	87
Wales	36	34	32	43	40	38	61	60	58
UK	41	44	44	50	53	51	716	741	828

**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: May 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	59	55	42	46	44	53	65	63	60	64	66	62	18	10	12	22	14	8	24	13	14	25	16	12
Northern Ireland	48	51	47	38	39	31	62	61	57	61	58	48	34	34	33	37	36	37	29	35	31	31	35	35
Scotland	59	57	59	49	48	48	68	65	67	67	66	65	17	0	0	23	0	0	17	0	0	20	0	0
Wales	56	56	51	41	40	38	61	65	60	58	56	54	5	0	0	8	0	0	5	7	5	7	8	7
UK	59	55	45	46	44	51	65	63	61	64	65	62	17	10	12	21	14	9	22	13	14	23	16	12

\*\* figures not available

**Table 5: Occupancy Levels by Size: May 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	37	41	39	451	41	45	44	454	47	49	45	178	53	47	49	108	59	62	57	67	58	48	46	60
Northern Ireland	24	26	19	85	41	38	34	28	40	40	36	28	45	45	37	17	46	49	41	12	51	51	49	13
Scotland	46	43	45	71	47	50	50	100	48	51	51	69	53	52	53	47	62	58	60	39	59	56	57	47
Wales	37	33	29	55	45	42	44	57	46	52	48	26	48	53	49	25	56	54	45	11	60	56	51	9
UK	38	40	39	662	42	45	45	639	47	49	46	301	53	48	49	197	59	61	56	129	58	50	48	129

**B: Percentage Bedroom Occupancy**

England	45	50	47	451	51	56	54	454	58	61	56	178	68	66	62	108	75	74	68	67	72	69	68	60
Northern Ireland	31	33	24	85	51	47	39	28	64	60	52	28	64	61	51	17	73	74	63	12	82	75	67	13
Scotland	55	49	54	71	60	63	61	100	63	63	62	69	67	65	67	47	79	75	76	39	79	75	73	47
Wales	43	39	33	55	56	50	53	57	59	66	60	26	59	69	65	25	70	70	63	11	74	74	69	9
UK	46	49	47	662	53	56	55	639	59	62	57	301	67	66	63	197	75	74	69	129	73	70	69	129

**Table 6: Occupancy Levels by Location: May 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	45	49	45	312	60	51	51	234	49	48	46	268	44	45	45	499
Northern Ireland	41	41	38	40	45	47	41	59	40	39	37	19	37	39	38	65
Scotland	54	52	59	58	60	54	56	114	50	50	47	82	48	50	50	120
Wales	49	53	50	40	57	53	42	21	47	45	39	23	44	43	43	99
UK	47	49	47	450	59	51	51	428	49	48	46	392	44	45	45	783

**B: Percentage Bedroom Occupancy**

England	56	61	56	312	73	71	69	234	64	63	59	268	55	56	53	499
Northern Ireland	57	58	51	40	71	68	58	59	66	60	53	19	48	48	46	65
Scotland	66	61	68	58	77	71	72	114	69	65	62	82	59	62	60	120
Wales	58	66	62	40	72	69	61	21	64	63	56	23	55	53	53	99
UK	58	61	58	450	74	71	69	428	65	63	59	392	55	56	54	783

**Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	23	36	26	6	35	33	29	151	41	43	41	314	47	52	47	204	47	54	50	94	53	49	50	438
Northern Ireland	-	-	-	-	31	30	25	55	39	42	30	46	34	40	32	25	45	41	40	15	48	50	45	40
Scotland	31	34	-	-	49	48	52	73	49	49	52	74	53	51	54	44	54	50	55	42	56	54	55	138
Wales	-	-	-	-	34	30	27	28	48	44	39	55	46	48	39	22	56	49	52	15	51	54	50	62
UK	24	36	25	9	37	35	32	307	43	44	42	489	48	51	47	295	49	53	51	166	53	50	51	678

**B: Percentage Bedroom Occupancy**

England	26	42	36	6	45	43	37	151	51	53	50	314	58	64	57	204	59	64	61	94	68	67	63	438
Northern Ireland	-	-	-	-	37	37	29	55	52	55	38	46	52	59	46	25	75	60	54	15	75	72	64	40
Scotland	40	41	-	-	71	62	70	73	68	68	68	74	66	67	64	44	68	61	65	42	69	69	69	138
Wales	-	-	-	-	42	37	31	28	58	51	47	55	60	60	54	22	73	63	64	15	63	70	65	62
UK	28	42	34	9	48	45	41	307	54	55	52	489	59	64	58	295	62	64	62	166	68	68	64	678

- 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)