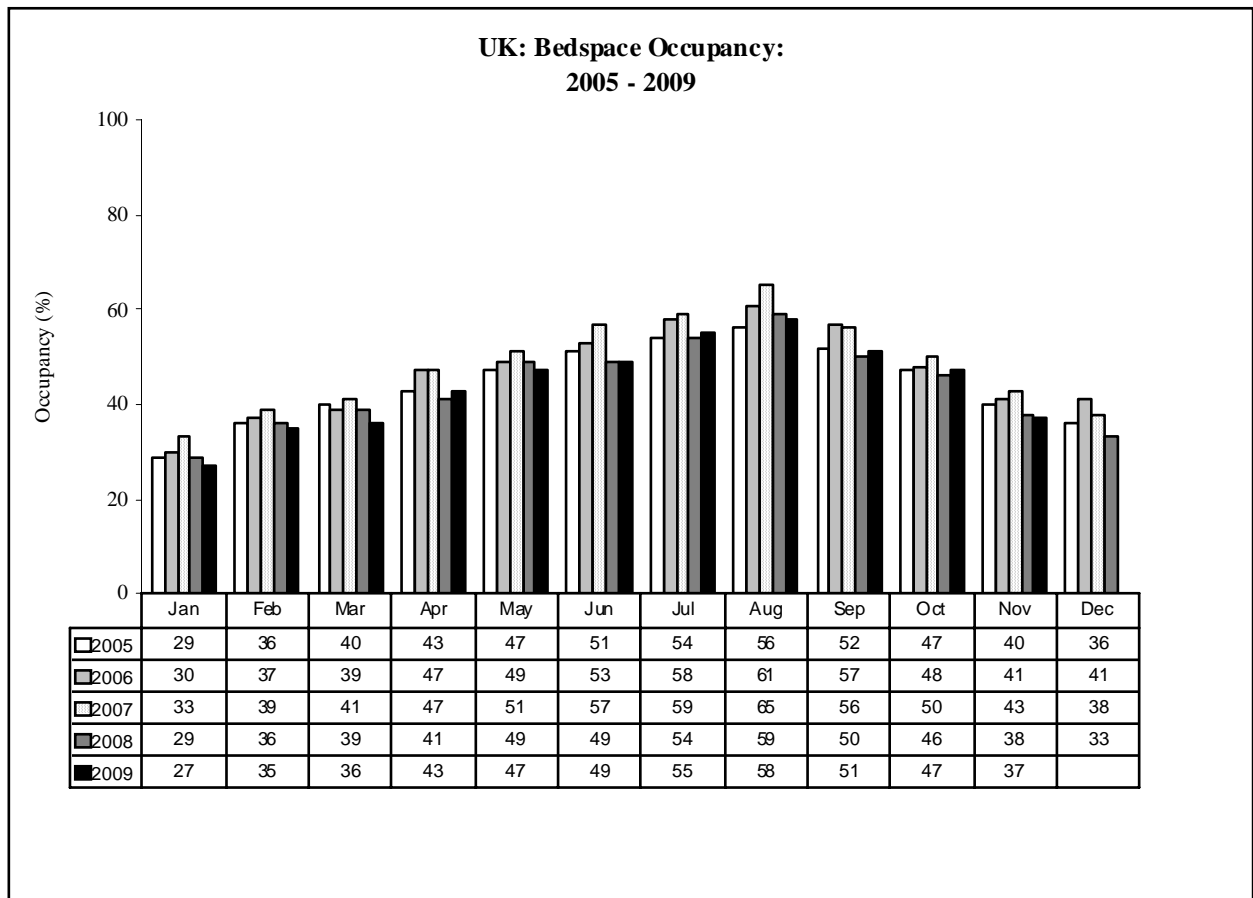


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

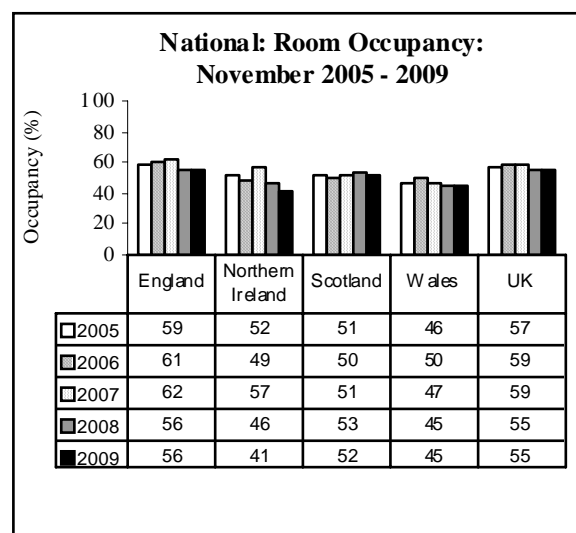
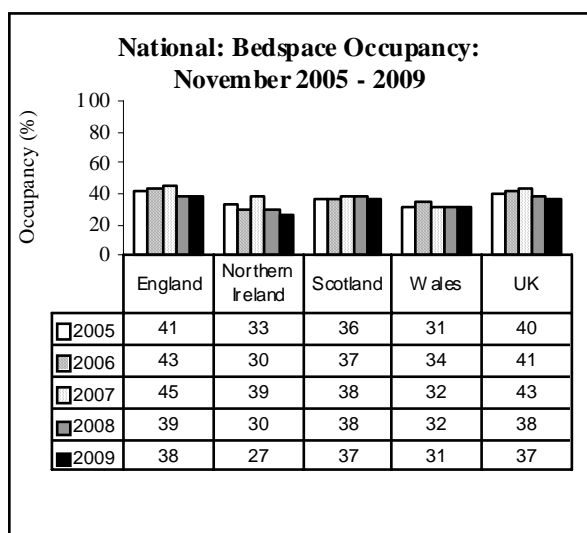
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

NOVEMBER 2009



- 1730 hotels, guest houses and bed and breakfast establishments throughout the UK 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 November 2009 was 37%, one percentage point lower than in November 2008. At 55%, room occupancy was the same as in November 2008.



- Bedspace occupancy varied from 38% in England to 27% in Northern Ireland, while room occupancy varied from 56% in England to 41% in Northern Ireland.
- When compared with November 2008, bedspace occupancy fell in all four countries – by 1 percentage point in England, Scotland and Wales and by 3 percentage points in Northern Ireland. Room occupancy remained at its November 2008 level in England and Wales but fell in Scotland and Northern Ireland (by 1 and 5 percentage points respectively).
- When compared with four years earlier, both measures of occupancy in Scotland had risen (by 1 percentage point) while in Wales bedspace occupancy was the same as in November 2005 but room occupancy was 1 percentage point lower. In England and Northern Ireland both room and bedspace occupancy had fallen (by 3 percentage points in England and by 11 and 6 percentage points in Northern Ireland).
- Bedspace occupancy by non-UK residents in England and Northern Ireland rose slightly when compared with November 2008 but fell (also slightly) in Wales (comparable figures for Scotland are no longer collected - (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

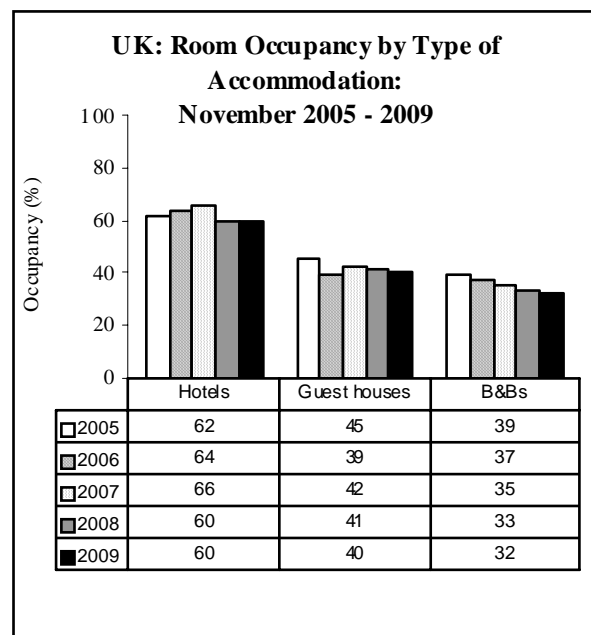
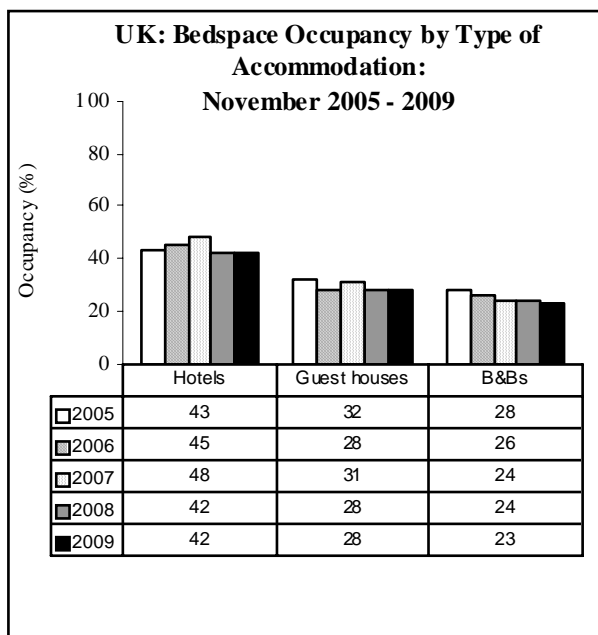
Table 1: Occupancy Levels: November 2007 – 2009

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	45	39	38	62	56	56	676	1167	1114
Northern Ireland	39	30	27	57	46	41	174	189	134
Scotland	38	38	37	51	53	52	322	323	326
Wales	32	32	31	47	45	45	159	165	156
UK	43	38	37	59	55	55	1331	1844	1730

Table 2: UK/Non-UK Occupancy Levels: November 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	31	30	28	4	4	5	9	7	13	12	11	15	676	1167	1114
Northern Ireland	29	22	18	10	8	9	29	29	29	25	27	33	174	189	134
Scotland	29	**	**	4	**	**	11	**	**	12	**	**	322	323	326
Wales	27	24	25	2	2	1	4	**	**	5	7	5	159	165	156
UK	30	29	28	4	4	5	9	7	13	12	11	15	1331	1844	1730

** figures not available



- When compared with November 2008, occupancy levels in hotels were unchanged as was bedspace occupancy in guest houses. Room occupancy in guest houses and both room and bedspace occupancy in bed and breakfast establishments had fallen (by 1 percentage point in each case) (see Table 3).
- When compared with November 2008, occupancy levels fell slightly in 2 size categories (those establishments with 11-25 and 51-100 letting bedrooms). Establishments with 26-50 letting bedrooms saw a rise in room occupancy (of 1 percentage point) with bedspace occupancy remaining as in November 2008 while in establishments with 4-10 letting bedrooms bedspace occupancy rose but room occupancy fell (by 1 percentage point in each case). Occupancy levels in the smallest establishments (those with 1-3 letting bedrooms) remained as in November 2008 as did room occupancy in the largest establishments (those with more than 100 letting bedrooms). In the latter size category bedspace occupancy fell by 3 percentage points (see Table 5).
- When compared with November 2008, occupancy levels in seaside and small town locations fell (by 3 percentage points for bedspace occupancy and 1 for room occupancy in seaside locations and by 3 percentage points (bedspace) and 2 (room) in small town locations). In city/large town locations, bedspace occupancy rose (by 1 percentage point) with room occupancy remaining unchanged while in country/village locations bedspace occupancy remained unchanged but room occupancy fell by 2 percentage points (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 as in November 2008. All other tariff bands saw a fall in occupancy levels of between 2 and 4 percentage points (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	50	43	42	69	61	61	231	380	373
Northern Ireland	45	36	33	66	55	50	69	69	68
Scotland	42	42	42	57	58	59	194	217	224
Wales	38	38	37	55	53	54	92	93	86
UK	48	42	42	66	60	60	586	759	751
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	32	29	29	43	43	42	126	277	271
Northern Ireland	29	12	13	40	19	18	25	20	17
Scotland	27	26	23	38	36	34	59	106	51
Wales	26	18	23	35	26	31	24	28	32
UK	31	28	28	42	41	40	234	431	371
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	26	26	25	38	35	34	319	508	466
Northern Ireland	19	14	8	28	19	13	80	100	49
Scotland	21	20	19	27	28	25	69	106	51
Wales	15	16	14	22	22	20	43	44	38
UK	24	24	23	35	33	32	511	758	604

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: November 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	49	36	35	42	42	42	60	60	58	65	52	53	8	8	15	9	7	11	13	12	16	11	10	14
Northern Ireland	40	32	33	33	24	23	53	42	43	57	44	38	29	32	33	32	33	33	27	30	41	28	30	37
Scotland	41	41	41	35	35	35	48	49	50	53	55	54	11	**	**	10	**	**	12	**	**	11	**	**
Wales	35	34	35	29	29	27	44	42	44	48	46	45	3	**	**	6	**	**	4	5	3	6	8	7
UK	47	36	36	40	40	40	57	57	56	62	52	52	8	8	15	9	8	11	13	12	16	11	10	14

** figures not available

Table 5: Occupancy Levels by Size: November 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	22	20	338	31	28	28	382	33	35	34	151	42	40	41	103	55	51	50	73	57	45	42	67
Northern Ireland	11	7	5	45	32	19	14	15	33	25	23	25	39	29	24	16	40	36	31	18	61	45	41	15
Scotland	17	17	32	45	29	27	29	81	33	35	35	65	45	40	39	45	49	50	52	41	54	51	51	49
Wales	14	13	14	35	25	23	24	47	33	33	34	28	41	38	36	22	47	41	39	14	45	50	46	10
UK	20	21	21	463	30	27	28	525	33	35	34	269	42	40	40	186	53	50	49	146	56	46	43	141
B: Percentage Bedroom Occupancy																								
England	29	30	28	338	42	38	37	382	47	49	48	151	57	55	57	103	72	67	66	73	80	67	67	67
Northern Ireland	17	10	7	45	43	26	20	15	54	40	36	25	60	43	38	16	62	57	47	18	81	66	59	15
Scotland	24	24	37	45	39	40	40	81	45	48	47	65	61	55	53	45	65	69	68	41	72	71	74	49
Wales	19	16	19	35	33	31	31	47	46	48	47	28	59	55	52	22	65	59	60	14	70	69	67	10
UK	27	28	28	463	41	38	37	525	47	49	48	269	58	55	56	186	70	67	66	146	78	68	68	141

Table 6: Occupancy Levels by Location: November 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	34	35	31	247	56	46	47	233	36	39	35	229	28	30	29	399
Northern Ireland	25	23	18	30	47	36	33	50	38	30	25	14	25	18	21	40
Scotland	30	31	31	48	51	47	46	107	32	34	35	71	31	29	30	100
Wales	40	36	35	38	44	48	45	19	31	24	27	22	27	26	24	77
UK	34	34	31	363	54	46	47	409	35	37	34	336	28	29	29	616

B: Percentage Bedroom Occupancy

England	45	45	45	247	77	69	69	233	53	53	51	229	40	43	41	399
Northern Ireland	38	33	30	30	67	55	49	50	59	48	37	14	33	24	29	40
Scotland	41	42	40	48	67	65	65	107	50	52	51	71	42	40	40	100
Wales	51	49	47	38	75	67	67	19	48	36	42	22	38	35	34	77
UK	45	45	44	363	75	68	68	409	52	52	50	336	40	42	40	616

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	11	9	-	-	22	19	17	99	29	26	22	246	38	31	28	171	31	39	37	92	43	41	42	394
Northern Ireland	-	-	-	-	20	12	8	30	27	16	10	25	34	25	20	21	35	28	28	9	48	39	35	48
Scotland	14	14	-	-	38	29	22	53	30	30	30	65	40	33	35	48	33	38	37	35	45	44	43	124
Wales	-	-	-	-	18	12	13	20	20	20	17	39	31	27	30	22	46	44	38	15	41	41	39	60
UK	11	10	-	-	24	20	17	202	28	26	22	375	38	31	29	262	32	39	37	151	43	41	42	626

B: Percentage Bedroom Occupancy

England	13	17	-	-	31	27	26	99	40	36	32	246	54	43	40	171	43	52	49	92	59	58	58	394
Northern Ireland	-	-	-	-	26	16	10	30	40	24	17	25	56	42	31	21	51	42	42	9	70	58	52	48
Scotland	21	22	-	-	60	42	35	53	45	48	45	65	53	48	46	48	46	51	50	35	59	59	58	124
Wales	-	-	-	-	26	16	19	20	28	28	24	39	43	38	41	22	63	59	48	15	61	58	57	60
UK	14	18	-	-	35	28	26	202	40	37	33	375	53	43	41	262	45	52	49	151	59	58	58	626

- 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)