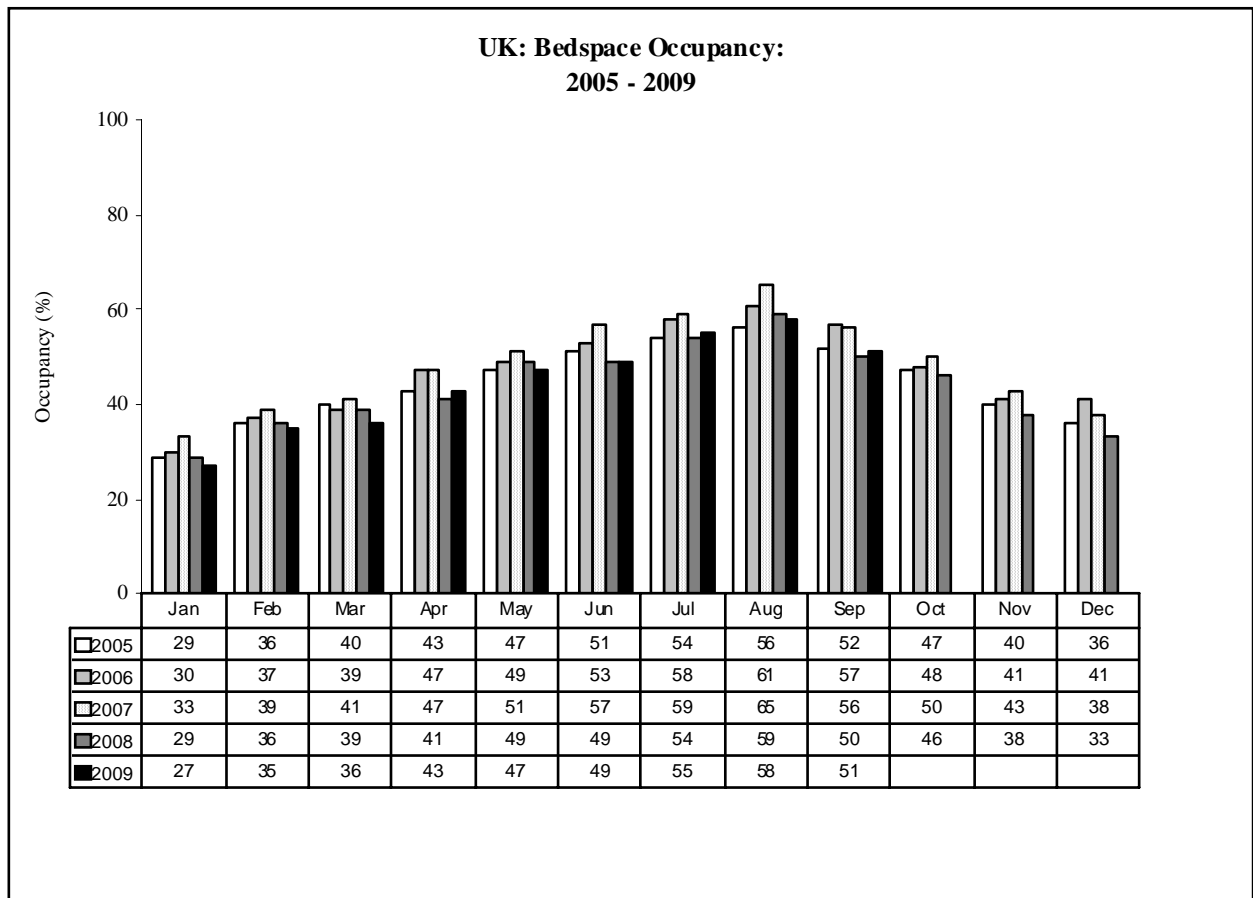


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

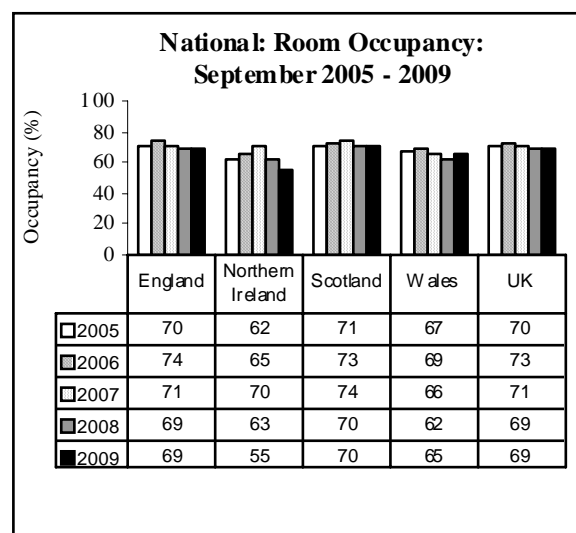
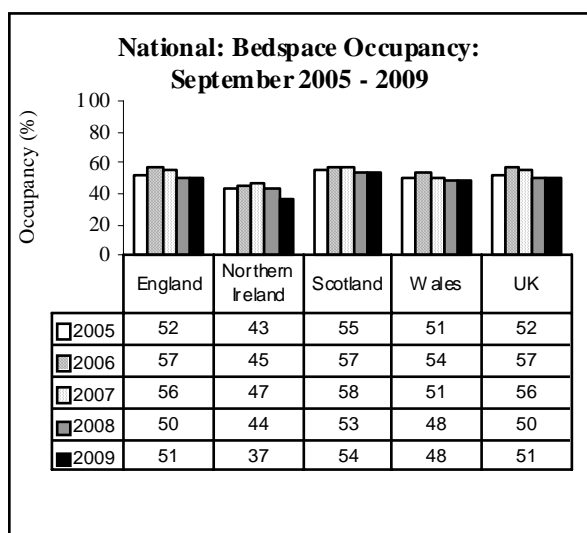
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

SEPTEMBER 2009



- Over 1,900 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 September 2009 was 51%, one percentage point higher than in September 2008. At 69%, room occupancy was the same as the previous year.



- Bedspace occupancy varied from 54% in Scotland to 37% in Northern Ireland, while room occupancy varied from 70% in Scotland to 55% in Northern Ireland.
- When compared with September 2008, bedspace occupancy rose (by 1 percentage point) and room occupancy was unchanged in both England and Scotland. In Wales room occupancy rose (by 3 percentage points) while bedspace occupancy remained at its September 2008 level. In Northern Ireland both room and bedspace occupancy fell (by 8 and 7 percentage points respectively).
- When compared with four years earlier, both room and bedspace occupancy levels had fallen throughout the UK with the greatest falls being in Northern Ireland where room occupancy fell by 7 percentage points and bedspace occupancy by 6 percentage points.
- Bedspace occupancy by non-UK residents rose when compared with September 2008 in England, remained unchanged in Wales and 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)).

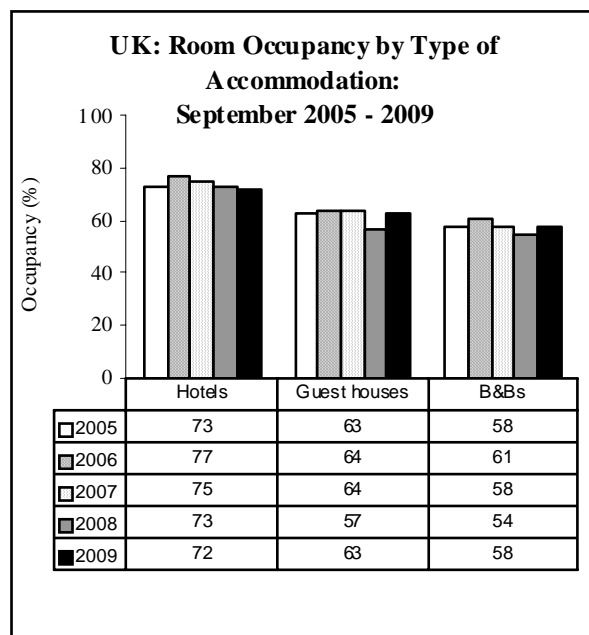
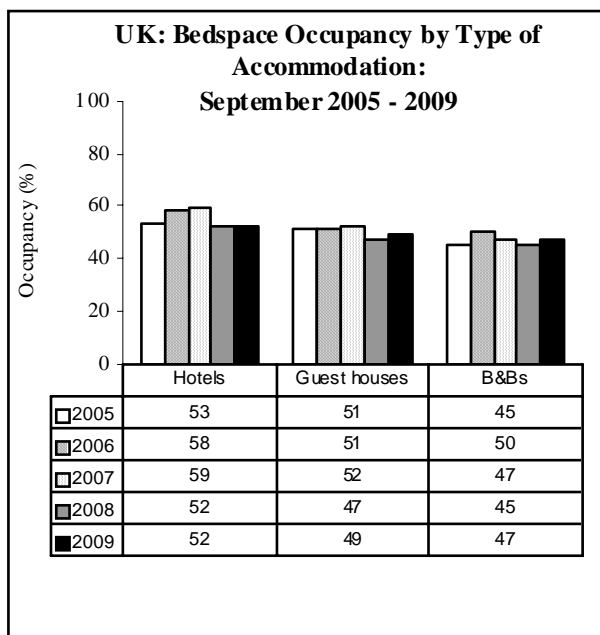
Table 1: Occupancy Levels: September 2007 – 2009

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	56	50	51	71	69	69	800	1280	1261
Northern Ireland	47	44	37	70	63	55	177	190	148
Scotland	58	53	54	74	70	70	395	394	401
Wales	51	48	48	66	62	65	197	191	185
UK	56	50	51	71	69	69	1569	2055	1911

Table 2: UK/Non-UK Occupancy Levels: September 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	46	41	40	7	7	10	11	11	20	12	14	20	800	1280	1261
Northern Ireland	32	30	26	15	14	11	37	35	32	32	32	30	177	190	148
Scotland	44	**	**	12	**	**	22	**	**	21	**	**	395	394	401
Wales	46	42	44	3	3	3	7	**	**	7	7	6	197	191	185
UK	45	41	40	8	7	10	13	11	20	13	14	19	1569	2055	1911

** figures not available



- When compared with September 2008, occupancy levels in guest houses and bed and breakfast establishments rose (by 2 percentage points for bedspace occupancy and by 6 (guest houses) and 4 (bed and breakfast establishments) for room occupancy). In hotels bedspace occupancy remained as in September 2008 while room occupancy fell by 1 percentage point (see Table 3).
- When compared with September 2008, occupancy levels rose in the 3 size categories with less than 26 letting bedrooms, with the greatest rise (of 6 percentage points for room occupancy) being in establishments with 4-10 letting bedrooms. Establishments with 26-50 letting bedrooms saw a rise in room occupancy (of 1 percentage point) with bedspace occupancy remaining unchanged, while the largest establishments (those with more than 100 letting bedrooms) saw a rise of 3 percentage points in bedspace occupancy with room occupancy remaining unchanged. Establishments with 51-100 letting bedrooms were the only size category to experience a fall in both measures of occupancy (with bedspace occupancy falling 4 percentage points and room occupancy 3) (see Table 5).
- When compared with September 2008, occupancy levels in country/village locations rose (by 1 percentage points for bedspace occupancy and 2 for room occupancy). In seaside locations room occupancy rose (by 3 percentage points) with bedspace occupancy being unchanged, while in city/large town locations room occupancy was the same as in September 2008 and bedspace occupancy rose slightly. Small town locations saw a fall (of 4 percentage points) in room occupancy with bedspace occupancy remaining unchanged (see Table 6).
- The least expensive establishments (those with a maximum tariff of less than £20.00) experienced a rise in occupancy levels as did those in the £40.00 - £49.99 tariff band. Establishments with a maximum tariff of £20.00 - £29.99 or over £60.00 saw a rise in bedspace occupancy with room occupancy remaining unchanged, while in the £30.00 - £39.99 tariff band both measures of occupancy were the same as in September 2008. The £50.00 - £59.99 tariff band was the only one to show a decrease in occupancy levels with bedspace occupancy falling by 7 percentage points and room occupancy by 6 (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	59	51	51	75	73	72	271	398	394
Northern Ireland	51	49	41	79	71	62	62	65	64
Scotland	59	55	56	77	73	74	215	239	247
Wales	54	52	52	71	69	71	98	99	88
UK	59	52	52	75	73	72	646	801	746
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	52	47	50	64	56	64	162	306	315
Northern Ireland	40	30	33	55	40	41	24	25	17
Scotland	56	53	50	67	66	62	74	71	69
Wales	52	42	45	61	55	57	38	34	39
UK	52	47	49	64	57	63	298	436	430
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	47	46	48	59	56	59	367	572	548
Northern Ireland	38	30	24	48	40	29	91	100	67
Scotland	54	46	51	61	53	59	106	84	85
Wales	36	33	37	43	39	45	61	58	58
UK	47	45	47	58	54	58	625	814	697

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: September 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	58	47	47	55	55	56	67	70	70	75	67	69	11	13	24	12	8	16	12	15	22	13	12	18
Northern Ireland	50	47	44	44	38	34	67	60	56	70	60	55	32	34	30	39	39	31	28	32	27	33	35	31
Scotland	61	58	60	56	51	51	70	68	71	76	70	69	20	**	**	25	**	**	20	**	**	22	**	**
Wales	55	53	54	47	44	45	64	62	65	65	62	64	6	**	**	9	**	**	6	5	5	7	7	6
UK	58	49	49	54	53	54	67	69	70	74	67	69	12	13	24	14	9	16	13	15	21	14	12	17

** figures not available

Table 5: Occupancy Levels by Size: September 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	44	41	42	413	48	47	50	434	55	49	51	167	58	56	55	109	66	62	57	73	60	43	47	65
Northern Ireland	27	22	17	59	45	36	36	20	45	41	34	23	52	41	36	15	52	48	41	18	53	59	44	13
Scotland	51	40	46	72	54	49	49	105	53	50	55	74	57	55	57	52	65	61	62	44	64	58	59	52
Wales	35	30	31	54	49	44	47	54	52	50	49	28	54	51	52	23	59	56	53	15	63	57	62	11
UK	44	40	41	598	49	47	49	613	54	49	51	292	57	55	55	199	65	61	57	150	61	46	49	141

B: Percentage Bedroom Occupancy

England	53	50	51	413	62	55	63	434	68	64	65	167	75	73	72	109	83	79	76	73	75	74	73	65
Northern Ireland	35	30	21	59	56	46	43	20	68	61	49	23	75	63	50	15	81	75	63	18	84	78	69	13
Scotland	59	46	56	72	67	63	63	105	68	64	67	74	79	73	73	52	82	80	80	44	81	80	81	52
Wales	41	37	39	54	57	54	59	54	66	65	64	28	74	71	71	23	78	70	76	15	83	81	82	11
UK	53	48	50	598	62	56	62	613	68	64	65	292	76	73	72	199	83	79	76	150	77	75	75	141

Table 6: Occupancy Levels by Location: September 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	55	51	52	298	60	50	51	231	54	51	51	252	50	47	48	474
Northern Ireland	46	40	39	32	50	48	38	52	49	39	39	14	40	36	34	50
Scotland	57	56	55	69	66	58	57	116	52	50	49	86	55	48	53	130
Wales	57	55	54	43	59	57	55	25	46	43	39	22	48	42	46	95
UK	55	52	52	442	61	51	52	424	53	50	50	374	50	47	48	749

B: Percentage Bedroom Occupancy

England	68	65	69	298	77	73	73	231	69	71	67	252	62	61	62	474
Northern Ireland	64	56	55	32	78	71	59	52	77	56	52	14	49	47	44	50
Scotland	71	68	68	69	81	78	77	116	73	69	67	86	68	62	64	130
Wales	72	70	70	43	82	78	78	25	64	57	57	22	58	53	57	95
UK	69	66	69	442	78	74	74	424	69	70	66	374	62	60	62	749

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): September 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	31	26	33	5	43	35	37	124	52	45	45	301	51	52	54	196	56	62	53	97	60	51	53	425
Northern Ireland	7	2	36	2	33	29	23	42	44	36	27	27	45	36	31	21	49	40	42	11	53	52	43	45
Scotland	29	15	15	4	52	43	45	63	55	46	46	87	62	53	56	46	61	54	54	44	60	58	60	155
Wales	8	9	1	1	38	30	28	30	45	40	43	52	52	46	45	23	56	49	47	13	58	56	56	66
UK	31	24	30	9	44	36	37	259	52	45	45	467	53	51	53	286	57	60	53	165	60	52	54	691

B: Percentage Bedroom Occupancy

England	42	38	41	5	53	46	48	124	64	57	58	301	66	55	67	196	72	73	67	97	76	72	72	425
Northern Ireland	10	0	33	2	39	36	26	42	61	48	37	27	69	58	46	21	72	62	60	11	81	75	65	45
Scotland	30	19	21	4	74	61	53	63	75	68	66	87	77	71	69	46	72	68	64	44	77	74	75	155
Wales	9	9	1	1	44	39	34	30	53	49	54	52	67	62	59	23	74	65	62	13	77	73	75	66
UK	42	35	38	9	55	47	47	259	65	58	58	467	68	58	66	286	72	72	66	165	76	72	72	691

- 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)