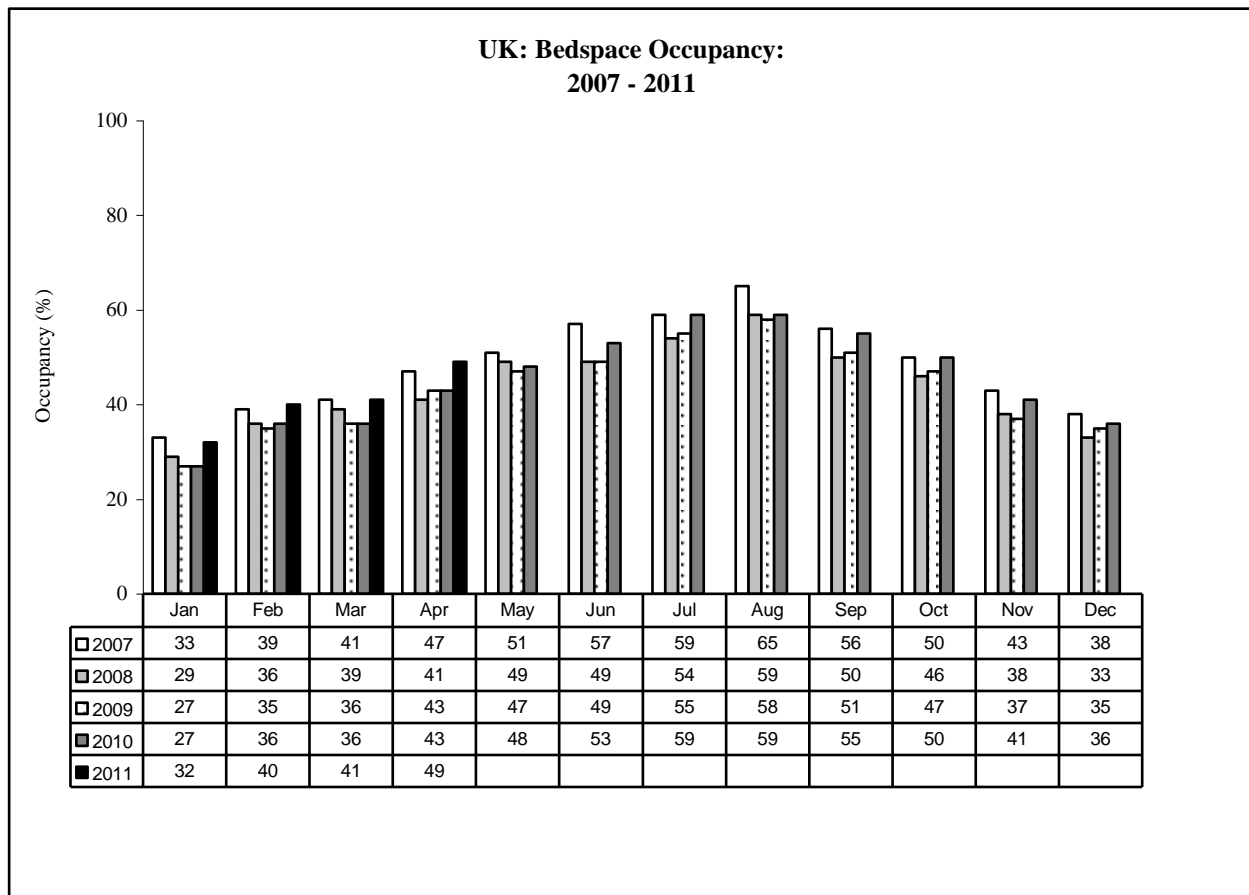


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

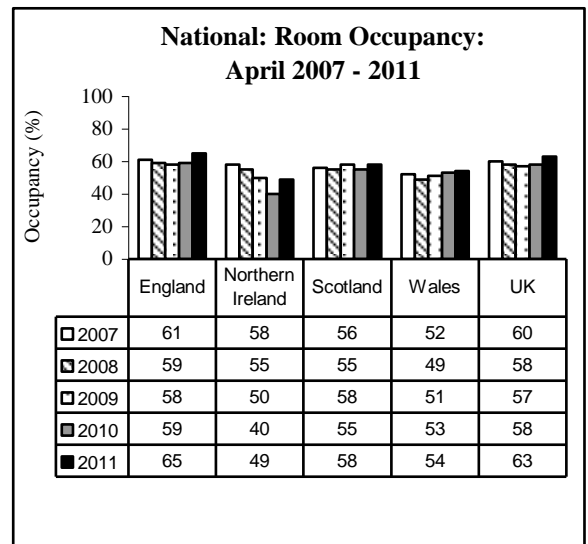
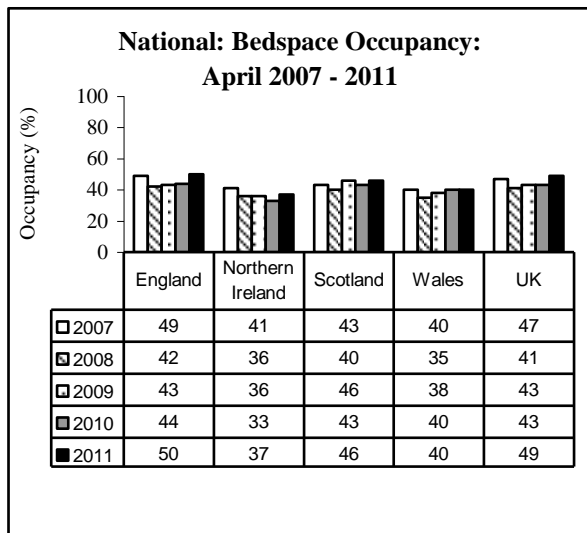
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

APRIL 2011



- 2450 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 April 2011 was 49%, six percentage points higher than in April 2010. At 63%, room occupancy was five percentage points higher than in April 2010.



- Bedspace occupancy varied from 50% in England to 37% in Northern Ireland while room occupancy varied from 65% in England to 49% in Northern Ireland.
- When compared with April 2010, occupancy levels rose in England, Scotland and Northern Ireland (by 6 percentage points in England, by 3 in Scotland and by 4 (bedspace occupancy) and 9 (room occupancy)) in Northern Ireland. In Wales, room occupancy rose by 1 percentage point with bedspace occupancy remaining at its April 2010 level.
- When compared with four years earlier, occupancy levels in England and Scotland had risen while those in Northern Ireland had fallen. In Wales, room occupancy had risen and bedspace occupancy remained as in April 2007.
- Bedspace occupancy by non-UK residents increased in Northern Ireland 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)).

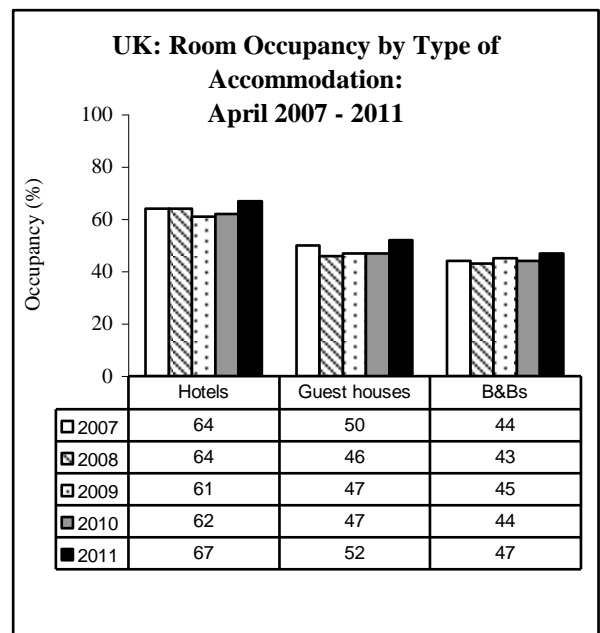
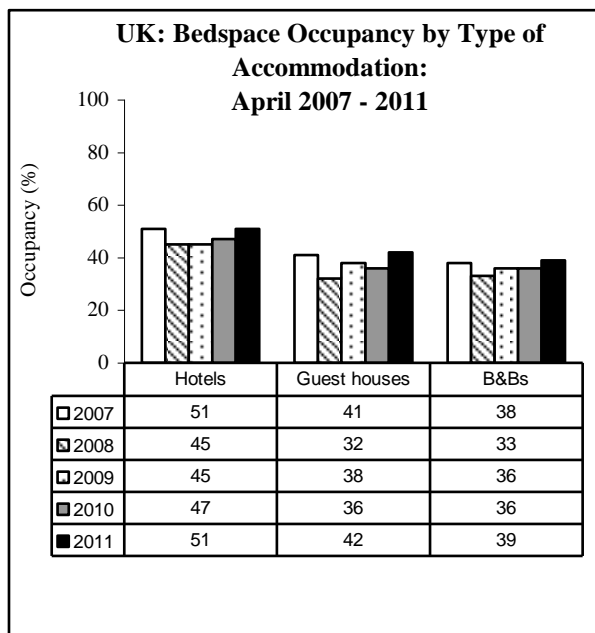
Table 1: Occupancy Levels: April 2009 – 2011

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	43	44	50	58	59	65	1357	1181	1715
Northern Ireland	36	33	37	50	40	49	181	141	193
Scotland	46	43	46	58	55	58	359	383	377
Wales	38	40	40	51	53	54	192	201	165
UK	43	43	49	57	58	63	2089	1906	2450

Table 2: UK/Non-UK Occupancy Levels: April 2009 – 2011 (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		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	36	34	39	5	6	6	12	9	11	12	15	13	1357	1181	1715
Northern Ireland	25	22	23	12	12	14	33	29	31	32	35	38	181	141	193
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	359	383	377
Wales	34	34	37	2	2	2	**	**	**	5	6	6	192	201	165
UK	36	34	39	5	6	6	12	9	11	12	15	13	2089	1906	2450

** figures not available



- Occupancy levels in all types of accommodation had risen when compared with April 2010 with the greatest rise (of 6 percentage points for bedspace occupancy) being in guest houses (see Table 3).
- When compared with April 2010, five of the six size categories saw a rise in occupancy levels, with the greatest rises (of 10 percentage points for bedspace occupancy and 5 for room occupancy) being in the largest establishments. In establishments with 51-100 letting bedrooms, room occupancy rose (by 1 percentage point) but bedspace occupancy fell (by 5 percentage points) (see Table 5).
- When compared with April 2010, occupancy levels rose in seaside, city/large town and country/village locations with the greatest rise (of 8 percentage points for room occupancy) being in establishments in seaside locations. In small town locations, room occupancy rose but bedspace occupancy fell slightly (see Table 6).
- All tariff bands saw a rise in occupancy levels when compared with April 2011, with the greatest rises (of 7 percentage points for both room and bedspace occupancy) being in those establishments 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: April 2009 – 2011

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	45	47	52	61	63	68	420	363	1039
Northern Ireland	42	39	43	58	46	56	70	68	70
Scotland	49	47	50	63	60	64	216	241	248
Wales	43	46	44	58	60	60	95	104	81
UK	45	47	51	61	62	67	801	776	1438
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	38	38	43	48	49	54	330	330	273
Northern Ireland	19	17	19	26	21	26	21	19	16
Scotland	39	33	43	48	42	49	64	63	57
Wales	35	29	30	44	37	40	41	38	31
UK	38	36	42	47	47	52	456	450	377
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	38	38	41	47	46	50	605	487	403
Northern Ireland	20	20	21	24	26	28	90	24	107
Scotland	32	31	30	39	37	37	79	79	72
Wales	26	32	29	32	39	33	56	59	53
UK	36	36	39	45	44	47	830	649	635

	Bedspace occupancy %						Room occupancy %						Percentage of non-UK guests						Percentage of non-UK bednights					
	Weekend			Weekday			Weekend			Weekday			Weekend			Weekday			Weekend			Weekday		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	39	40	54	50	50	45	57	59	65	59	60	65	15	11	9	9	8	13	14	17	12	10	13	15
Northern Ireland	43	39	40	31	29	28	52	43	51	47	38	42	35	28	33	34	30	36	34	35	41	32	36	42
Scotland	52	48	50	42	39	42	59	55	58	57	54	58	**	**	**	**	**	**	**	**	**	**	**	**
Wales	46	48	37	33	34	28	55	56	47	49	50	46	**	**	**	**	**	**	5	6	6	6	6	8
UK	41	42	52	48	47	43	57	58	63	58	58	63	15	11	10	10	8	14	14	17	12	10	13	15

** figures not available

a: Percentage Bedspace Occupancy																								
	1 – 3 rooms				4 – 10 rooms				11 – 25 rooms				26 – 50 rooms				51 – 100 rooms				>100 rooms			
	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011
England	33	33	36	277	39	39	39	384	41	41	45	136	47	50	50	92	53	55	50	58	41	42	54	768
Northern Ireland	12	17	14	93	25	17	22	25	31	31	30	26	36	32	35	15	41	38	40	21	48	45	49	13
Scotland	29	27	28	64	38	33	43	87	42	39	39	70	48	47	51	55	61	57	57	48	55	53	56	53
Wales	23	27	26	46	33	34	36	48	43	43	40	30	43	42	45	21	41	49	46	14	57	58	44	6
UK	32	32	34	480	38	38	39	544	41	41	44	262	47	49	50	183	53	55	50	141	44	44	54	840
B: Percentage Bedroom Occupancy																								
England	40	42	43	277	48	48	50	384	52	52	56	136	60	62	63	92	68	67	68	58	62	65	72	768
Northern Ireland	16	23	18	93	31	21	29	25	44	42	44	26	47	42	48	15	58	55	57	21	68	45	59	13
Scotland	37	34	34	64	47	43	49	87	57	50	53	70	60	60	62	55	75	72	70	48	69	69	72	53
Wales	27	33	33	46	42	43	44	48	53	52	50	30	58	57	57	21	56	66	71	14	74	72	62	6
UK	38	40	41	480	47	47	49	544	53	52	55	262	60	61	62	183	68	67	68	141	64	66	71	840

Table 6: Occupancy Levels by Location: April 2009 – 2011**A: Percentage Bedspace Occupancy**

	Seaside				City/large town				Small town				Country/village			
	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011
England	41	39	45	259	48	48	55	649	41	43	42	370	39	44	46	437
Northern Ireland	34	35	34	40	40	35	43	63	37	31	26	58	27	30	20	32
Scotland	46	42	50	62	51	48	52	125	41	39	37	76	41	38	39	114
Wales	43	47	47	43	48	44	41	16	36	43	33	22	34	34	37	84
UK	42	40	46	404	48	47	54	853	41	42	41	526	39	42	44	667

B: Percentage Bedroom Occupancy

England	52	49	58	259	67	66	71	649	55	55	58	370	49	54	57	437
Northern Ireland	41	45	44	40	57	42	56	63	48	38	34	58	36	31	29	32
Scotland	53	50	60	62	66	63	68	125	57	50	47	76	51	48	49	114
Wales	53	58	60	43	68	60	60	16	53	61	53	22	42	42	46	84
UK	52	50	58	404	67	65	70	853	55	54	56	526	49	52	55	667

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): April 2009 – 2011 (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			
	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011	2009	2010	2011	Sample size 2011
England	-	-	-	-	26	18	24	57	35	32	34	224	45	41	44	192	48	41	48	96	44	48	51	1071
Northern Ireland	-	-	-	-	19	16	21	39	31	17	16	54	31	27	30	35	39	32	49	14	42	41	42	51
Scotland	-	-	-	-	41	42	27	34	39	36	37	75	42	38	38	46	53	42	49	43	49	47	52	179
Wales	12	-	-	-	22	24	21	16	32	34	30	55	40	37	42	24	39	47	47	13	46	48	44	57
UK	24	-	-	-	28	21	24	146	35	32	34	408	44	40	43	297	48	41	48	166	45	48	51	1358

B: Percentage Bedroom Occupancy

England	-	-	-	-	34	24	34	57	44	41	43	224	57	49	52	192	60	51	57	96	59	62	68	1071
Northern Ireland	-	-	-	-	23	20	23	39	38	23	24	54	43	38	46	35	49	41	57	14	60	47	54	51
Scotland	-	-	-	-	56	56	34	34	56	51	47	75	54	50	47	46	65	50	61	43	59	60	66	179
Wales	-	-	-	-	28	29	28	16	39	43	40	55	51	49	52	24	54	57	58	13	61	62	60	57
UK	30	-	-	-	36	28	33	146	45	42	43	408	56	49	51	297	60	51	58	166	59	62	67	1358

- 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 2011 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. 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.
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 or figures relating to arrivals for Wales (Tables 2 and 4).
 - (c) from June 2010, English occupancy data includes additional occupancy information for the 100+ room hotel sector supplied by STR Global. Given the change in the structure of the sample, care should be taken the interpretation of year-on-year changes.
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 January 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 2011) 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)