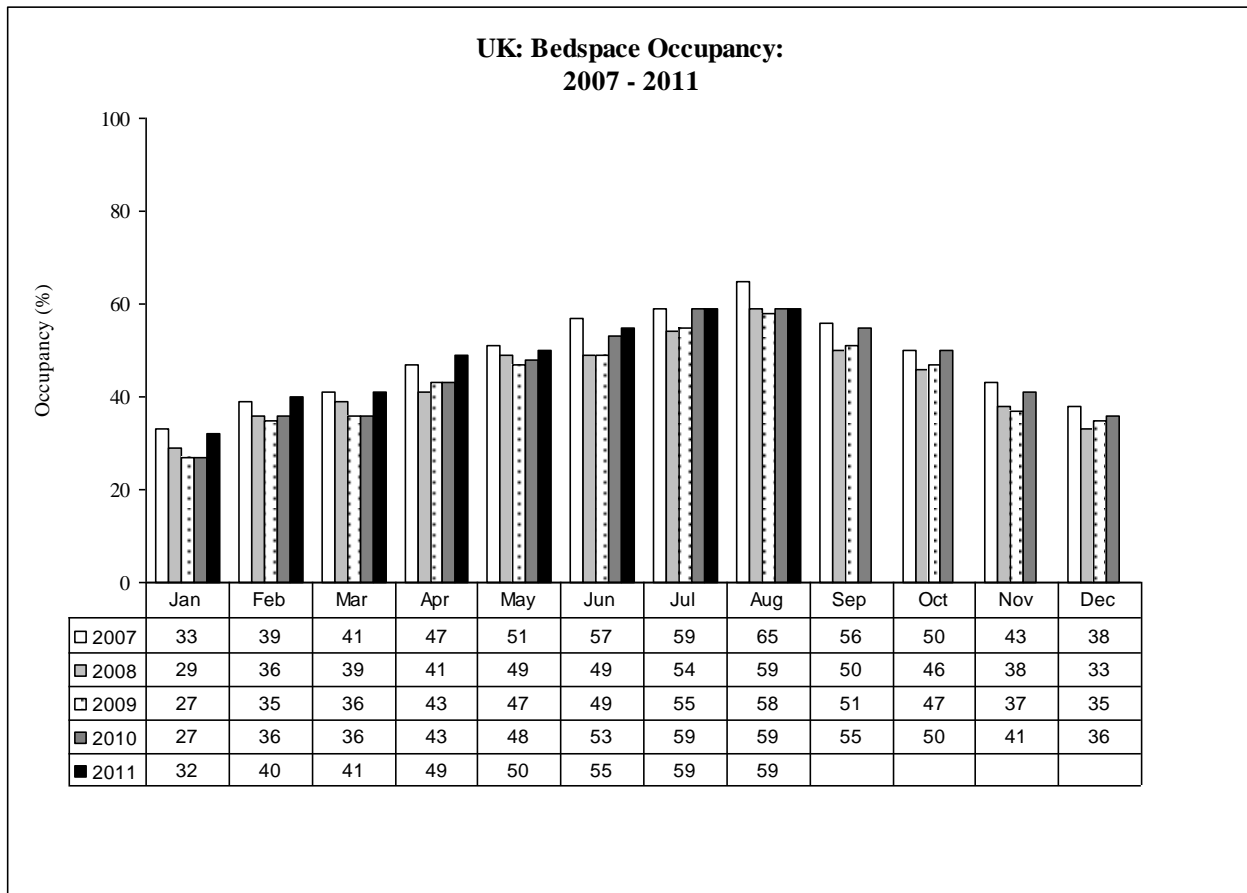


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

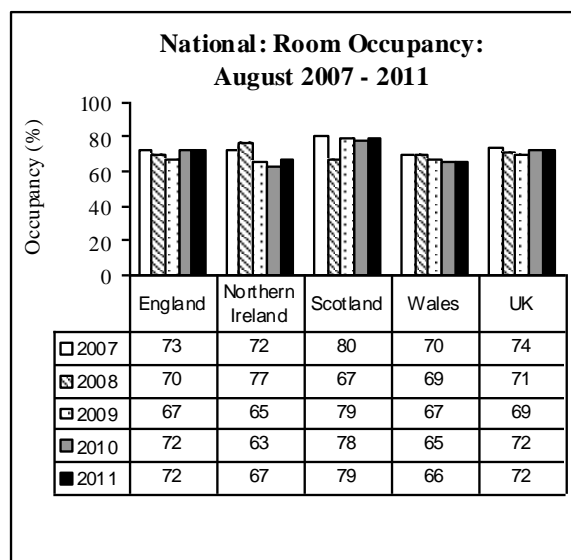
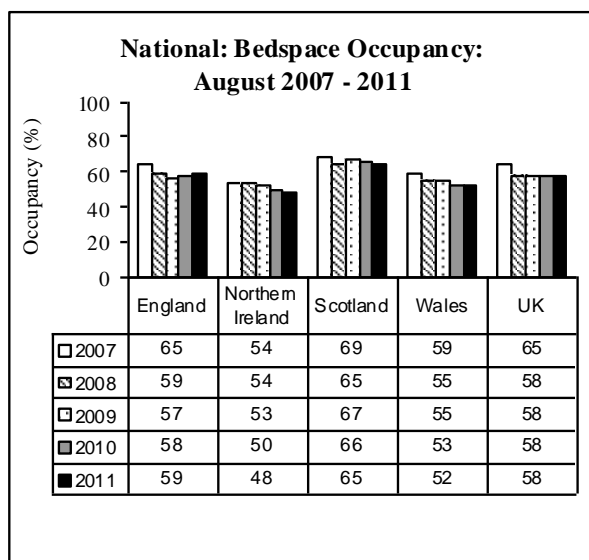
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

AUGUST 2011



- 2427 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 August 2011 was 59%, the same as in August 2010. At 72%, room occupancy was also the same as in August 2010.

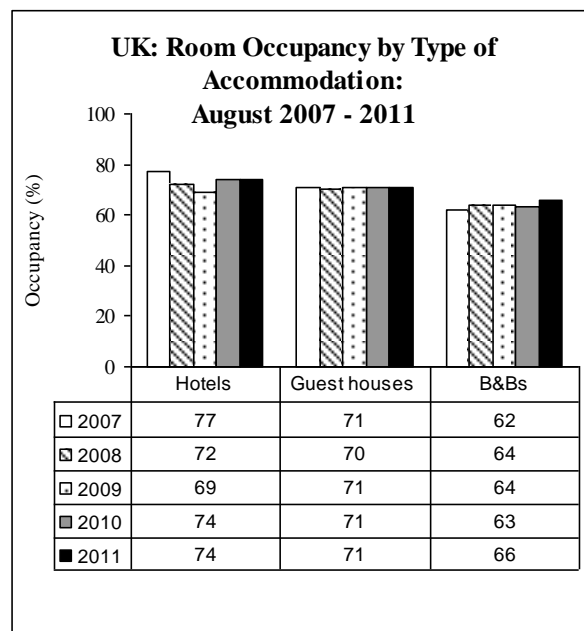
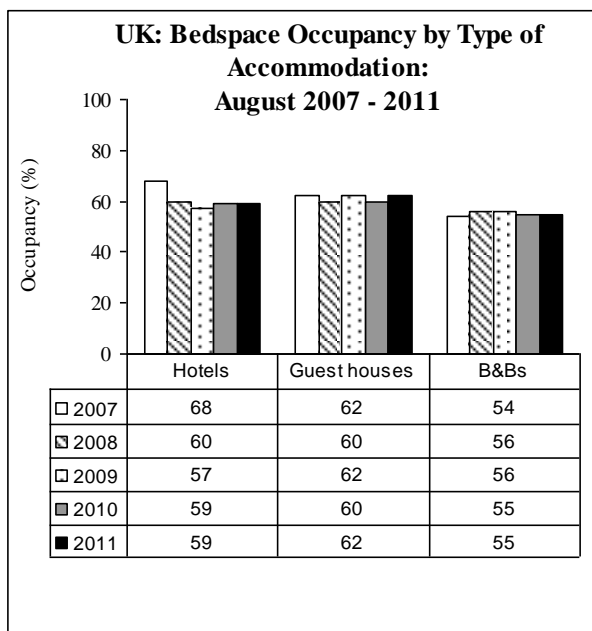


- Bedspace occupancy varied from 65% in Scotland to 48% in Northern Ireland while room occupancy varied from 79% in Scotland to 66% in Wales.
- When compared with August 2010, room occupancy levels rose in Scotland, Wales and Northern Ireland and remained unchanged in England. Bedspace occupancy rose slightly in England but fell in Scotland, Wales and Northern Ireland (by 1, 1 and 2 percentage points respectively).
- When compared with four years earlier, occupancy levels throughout the UK had decreased, with falls in bedspace occupancy being greater than the corresponding falls in room occupancy.
- Bedspace occupancy by non-UK residents increased slightly in Northern Ireland and remained as in August 2010 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)).

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	57	58	59	67	72	72	1268	1683	1715
Northern Ireland	53	50	48	65	63	67	151	167	169
Scotland	67	66	65	79	78	79	395	388	372
Wales	55	53	52	67	65	66	207	202	171
UK	58	59	59	69	72	72	2021	2440	2427

	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	49	50	51	9	8	8	15	11	13	15	14	14	1268	1683	1715
Northern Ireland	34	30	27	19	20	21	42	34	42	36	40	44	151	167	169
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	395	388	372
Wales	52	47	48	5	4	4	**	**	**	8	8	8	207	202	171
UK	49	49	50	9	8	8	16	12	14	15	14	14	2021	2440	2427

** figures not available



- Bedspace occupancy levels in guest houses had risen when compared with August 2010, with room occupancy remaining unchanged, while in bed and breakfast establishments room occupancy had risen (by 3 percentage points) with bedspace occupancy unchanged. In hotels both measures of occupancy were as in August 2010 (see Table 3).
- The three smallest size categories (those with 1-3, 4-10 and 11-25 letting bedrooms) saw little change in occupancy levels when compared with August 2010. In the two largest size categories (those with 51-100 and more than 100 letting bedrooms) occupancy levels had risen with the greatest rise (of 5 percentage points) being in bedspace occupancy. In establishments with 26-50 letting bedrooms both measures of occupancy had fallen – bedspace occupancy by 7 percentage points and room by 6 (see Table 5).
- When compared with August 2010, occupancy levels rose in country/village locations and remained unchanged in small town locations. In city/large town locations bedspace occupancy remained as in August 2010 with room occupancy falling (by 2 percentage points) while in seaside locations bedspace occupancy rose (by 2 percentage points) but room occupancy fell (by 1 percentage point) (see Table 6).
- Establishments in two tariff bands (those with maximum charges of £40.00-£49.99 and more than £60.00) experienced a rise in both measures of occupancy when compared with August 2010. The cheapest establishments (those with a maximum charge of £20.00-£29.99) showed a slight fall in bedspace occupancy with room occupancy as in August 2010, while the remaining two tariff bands (those with maximum charges of £30.00-£39.99 and £50.00-£59.99) recorded falls (of up to 11 percentage points) in both measures of occupancy (see Table 7 and note 5a, page 7 (sample sizes)).

Table 3: Occupancy Levels by Type of Establishment: August 2009 – 2011

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	56	58	59	67	73	73	396	948	1041
Northern Ireland	57	55	52	71	67	74	51	75	70
Scotland	66	67	66	80	80	82	237	233	239
Wales	58	58	53	71	69	69	102	105	84
UK	57	59	59	69	74	74	786	1361	1434
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	61	60	62	70	71	71	301	294	260
Northern Ireland	42	35	22	50	43	43	20	18	16
Scotland	70	66	68	81	77	78	70	68	59
Wales	56	47	54	67	59	61	43	38	29
UK	62	60	62	71	71	71	434	418	364
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	55	55	55	64	63	67	567	441	414
Northern Ireland	39	38	43	46	50	50	80	74	83
Scotland	67	65	59	73	70	68	88	87	74
Wales	46	44	46	52	55	54	62	59	58
UK	56	55	55	64	63	66	797	661	629

	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	53	63	64	62	54	55	65	73	74	69	71	72	18	9	11	12	14	15	17	13	13	14	16	15
Northern Ireland	48	53	57	52	46	46	62	64	71	63	60	64	43	34	38	39	37	41	34	38	45	33	40	49
Scotland	70	70	69	65	64	63	78	78	79	80	78	79	**	**	**	**	**	**	**	**	**	**	**	**
Wales	61	59	59	51	49	48	70	68	69	66	62	64	**	**	**	**	**	**	7	8	7	9	8	9
UK	56	63	64	62	55	55	67	73	74	70	71	72	19	10	12	13	15	16	17	13	13	14	16	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	2009	2010	2011
England	49	49	51	283	60	61	60	375	56	58	56	131	58	66	57	97	64	58	64	52	51	55	57	777			
Northern Ireland	31	29	27	74	46	45	50	21	49	40	34	26	51	52	43	14	49	56	57	20	68	60	54	14			
Scotland	65	61	56	65	63	64	68	85	65	62	65	66	69	67	67	58	67	69	70	46	69	68	66	52			
Wales	45	46	41	47	56	52	55	54	55	56	58	27	57	54	52	23	55	58	51	13	66	51	49	7			
UK	50	50	51	469	60	61	61	535	57	58	57	250	59	65	58	192	64	59	64	131	55	56	58	850			
B: Percentage Bedroom Occupancy																											
England	57	57	59	283	69	70	69	375	66	68	67	131	70	77	69	97	74	74	75	52	63	73	76	777			
Northern Ireland	37	35	35	74	53	60	54	21	61	56	60	26	62	62	65	14	70	71	71	20	79	71	79	14			
Scotland	72	68	65	65	76	73	77	85	76	71	76	66	80	80	81	58	80	85	85	46	85	86	88	52			
Wales	52	53	50	47	67	61	64	54	66	64	68	27	67	66	66	23	72	74	71	13	79	80	70	7			
UK	58	58	59	469	69	70	69	535	67	68	68	250	71	76	70	192	75	75	76	131	67	75	77	850			

Table 6: Occupancy Levels by Location: August 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	61	66	68	258	56	58	58	612	56	53	53	373	54	55	58	472
Northern Ireland	55	57	60	32	53	52	49	58	55	46	40	50	45	43	35	29
Scotland	65	67	69	55	72	70	67	121	62	57	57	80	65	68	66	116
Wales	65	68	64	42	54	40	42	16	51	46	46	23	53	51	51	90
UK	62	66	68	387	58	58	58	807	56	53	53	526	55	56	58	707

B: Percentage Bedroom Occupancy

England	72	76	74	258	67	75	72	612	62	67	68	373	64	65	69	472
Northern Ireland	70	68	75	32	66	65	73	58	63	59	46	50	53	54	43	29
Scotland	75	75	82	55	86	87	87	121	75	71	68	80	75	76	75	116
Wales	74	78	74	42	69	60	63	16	68	64	64	23	62	60	61	90
UK	72	76	75	387	70	75	73	807	64	67	67	526	65	66	69	707

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): August 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	53	-	-	-	49	43	44	51	56	59	54	212	58	60	60	201	57	71	58	90	59	56	59	1081
Northern Ireland	-	-	-	-	33	42	31	34	41	32	43	42	53	35	40	30	66	44	61	9	57	58	51	54
Scotland	-	-	-	-	61	62	53	32	59	64	62	79	58	63	69	41	71	64	63	36	73	70	68	184
Wales	-	-	-	-	42	38	34	17	52	46	52	54	53	52	55	24	51	56	50	13	61	60	54	63
UK	52	-	-	-	50	45	44	134	56	58	55	387	58	59	60	296	59	69	58	148	61	58	60	1382

B: Percentage Bedroom Occupancy

England	59	-	-	-	57	53	54	51	65	68	64	212	69	67	69	201	68	79	70	90	67	73	74	1081
Northern Ireland	-	-	-	-	38	50	38	34	53	46	53	42	61	53	60	30	75	55	69	9	71	70	73	54
Scotland	-	-	-	-	68	67	62	32	78	81	73	79	71	74	79	41	80	71	78	36	84	83	83	184
Wales	-	-	-	-	47	42	43	17	60	58	59	54	65	63	68	24	67	69	60	13	74	72	70	63
UK	59	-	-	-	57	54	54	134	66	69	65	387	69	67	70	296	70	77	70	148	70	74	75	1382

- 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 (0131-472-2222) and Visit Wales (029 2047 9909)