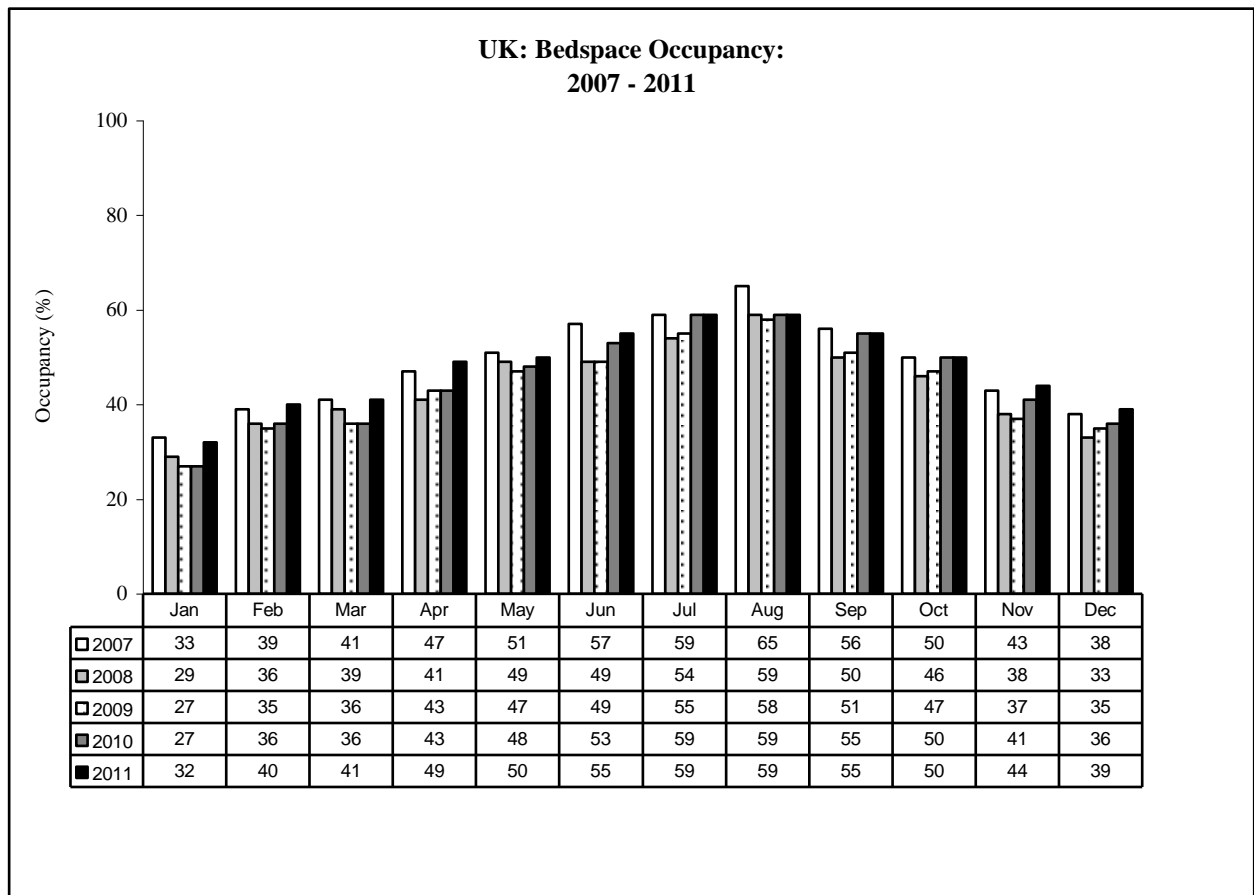


# UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

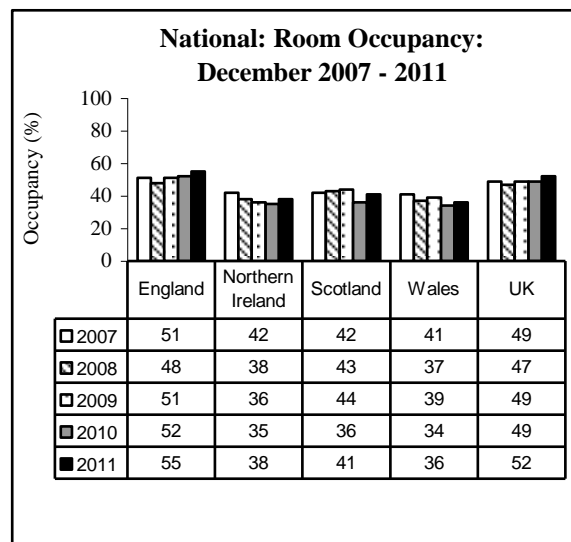
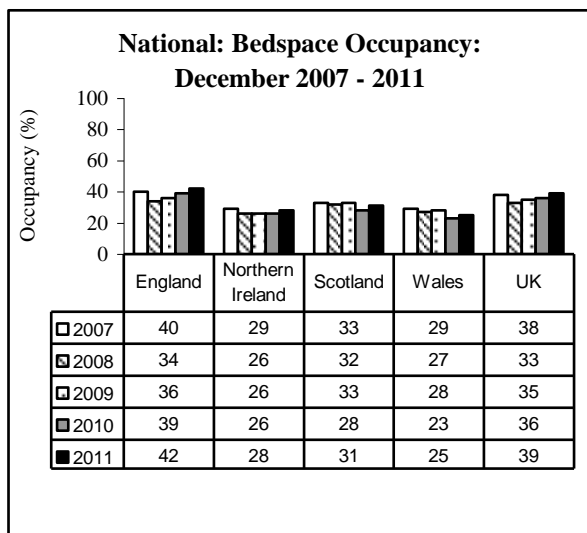
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

## DECEMBER 2011



- 2173 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 December 2011 was 39%, 3 percentage points higher than in December 2010. At 52%, room occupancy was also 3 percentage points higher than in December 2010.



- Bedspace occupancy varied from 42% in England to 25% in Wales while room occupancy varied from 55% in England to 36% in Wales.
- When compared with December 2010, both measures of occupancy rose throughout the UK with the greatest increase (of 5 percentage points) being in room occupancy in Scotland.
- Occupancy levels were higher in England than in December 2007 (bedspace by 2 percentage points and room by 4). In Scotland, Wales and Northern Ireland both room and bedspace occupancy were lower than in December 2007 with the greatest difference (of 5 percentage points) being in room occupancy in Wales.
- Bedspace occupancy by non-UK residents increased in Northern Ireland by 2 percentage points when compared with December 2010 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)).

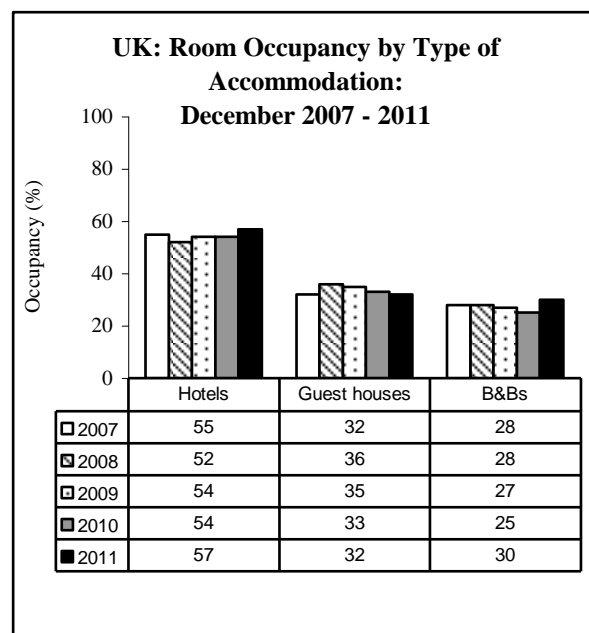
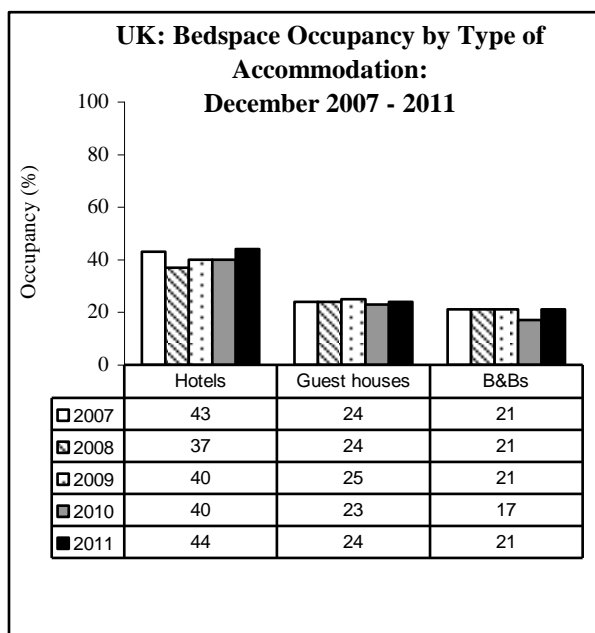
**Table 1: Occupancy Levels: December 2009 – 2011**

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	36	39	42	51	52	55	1051	1536	1597
Northern Ireland	26	26	28	36	35	38	154	145	159
Scotland	33	28	31	44	36	41	326	318	288
Wales	28	23	25	39	34	36	161	167	129
UK	35	36	39	49	49	52	1692	2166	2173

**Table 2: UK/Non-UK Occupancy Levels: December 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	27	25	31	4	4	4	9	9	8	13	15	12	1051	1536	1597
Northern Ireland	17	17	18	9	9	11	32	29	33	35	36	37	154	145	159
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	326	318	288
Wales	22	19	22	1	1	1	**	**	**	4	7	3	161	167	129
UK	26	24	30	4	4	4	9	9	9	13	15	12	1692	2166	2173

\*\* figures not available



- Occupancy levels in hotels and bed and breakfast establishments had risen (by 4 percentage points for bedspace occupancy and 3 for room occupancy in hotels and by 4 and 5 percentage points in bed and breakfast establishments) when compared with December 2010. As in November, guest houses saw bedspace occupancy rising by 1 percentage point but room occupancy falling by the same amount (see Table 3).
- Except for those establishments with 11-25 letting bedrooms (where both measures of occupancy remained unchanged), occupancy levels had risen when compared with December 2010 in all size categories (with the greatest rise of 5 percentage points being in bedspace occupancy in establishments with 51-100 letting bedrooms) (see Table 5).
- When compared with December 2010, occupancy levels rose in seaside, small town and country/village locations (by up to 6 percentage points (room occupancy in country/village locations)). In city/large town locations bedspace occupancy increased slightly while room occupancy remained as in the previous year (see Table 6).
- Establishments in four tariff bands (those with a maximum charge of £20.00-£29.99, £40.00-£49.99, £50.00-£59.99 and more than £60.00) experienced rises in both room and bedspace occupancy when compared with December 2010. Establishments in the remaining tariff band (£30.00-£39.99) saw a fall of 2 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: December 2009 – 2011**

<b>a: Hotels</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	41	42	46	55	57	59	361	918	1026
Northern Ireland	31	30	34	44	40	47	71	74	67
Scotland	37	32	37	49	41	49	228	222	211
Wales	34	29	31	47	42	44	91	93	71
UK	40	40	44	54	54	57	751	1307	1375
<b>b: Guest Houses</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	26	25	26	37	35	36	252	240	218
Northern Ireland	16	14	14	21	18	20	18	14	13
Scotland	19	18	17	27	26	21	47	46	39
Wales	19	13	9	27	18	12	31	32	22
UK	25	23	24	35	33	32	348	332	292
<b>c: Bed &amp; Breakfast Establishments</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	23	19	23	30	27	33	433	378	353
Northern Ireland	8	12	10	11	19	13	65	57	79
Scotland	13	11	15	18	15	19	51	50	38
Wales	12	12	10	16	17	11	39	42	36
UK	21	17	21	27	25	30	588	527	506

**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: December 2009 – 2011** (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		
	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	34	43	46	40	36	39	51	52	55	50	52	56	10	7	7	8	10	10	13	12	12	12	17	13
Northern Ireland	32	29	31	26	20	21	42	37	41	39	31	33	32	29	33	34	31	37	36	39	44	41	39	48
Scotland	35	33	37	32	25	28	41	38	43	45	35	40	**	**	**	**	**	**	**	**	**	**	**	**
Wales	29	28	30	26	20	21	37	36	39	39	31	35	**	**	**	**	**	**	3	6	3	5	8	4
UK	34	41	44	38	33	36	49	49	52	48	48	52	10	7	8	9	10	11	13	12	12	12	17	13

\*\* figures not available

**Table 5: Occupancy Levels by Size: December 2009 – 2011**

**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	18	15	18	243	25	22	23	327	34	32	32	123	41	35	38	89	48	44	50	54	37	46	47	761
Northern Ireland	3	6	5	67	16	20	15	21	23	19	19	23	24	26	21	14	29	25	29	22	36	41	44	12
Scotland	12	9	12	37	20	21	16	50	32	29	28	51	35	29	31	55	46	40	46	44	47	41	44	51
Wales	10	12	7	28	19	15	15	37	30	26	28	25	36	31	36	19	35	38	30	12	46	31	30	8
UK	17	14	16	375	24	21	22	435	33	31	31	222	40	34	37	177	47	43	48	132	39	44	46	832

**B: Percentage Bedroom Occupancy**

England	24	21	25	243	33	29	32	327	44	44	45	123	54	48	49	89	57	58	60	54	58	63	64	761
Northern Ireland	4	9	10	67	19	27	16	21	32	29	31	23	33	34	37	14	41	37	44	22	52	48	53	12
Scotland	16	12	16	37	30	27	22	50	42	37	36	51	44	37	42	55	56	48	58	44	62	53	59	51
Wales	14	16	10	28	26	19	18	37	40	39	37	25	47	43	45	19	52	52	49	12	60	44	48	8
UK	22	19	23	375	32	28	30	435	43	43	43	222	52	46	48	177	56	56	59	132	58	60	62	832

**Table 6: Occupancy Levels by Location: December 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	30	28	33	200	44	49	49	628	33	33	35	352	27	29	35	417
Northern Ireland	16	17	16	32	31	32	35	58	26	23	19	45	19	16	17	24
Scotland	24	21	26	34	40	36	41	113	27	20	20	62	28	24	28	79
Wales	29	27	29	30	45	33	31	17	24	21	23	19	21	19	19	63
UK	29	27	32	296	43	46	47	816	32	30	32	478	27	28	33	583

**B: Percentage Bedroom Occupancy**

England	40	37	41	200	62	64	63	628	46	47	49	352	39	40	46	417
Northern Ireland	27	23	20	32	43	42	47	58	36	35	25	45	25	21	25	24
Scotland	31	27	35	34	53	48	55	113	37	26	28	62	36	29	33	79
Wales	39	37	38	30	60	47	49	17	36	34	36	19	28	25	24	63
UK	39	36	40	296	60	61	61	816	44	43	45	478	38	37	43	583

**Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 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	-	-	-	-	16	15	17	45	19	20	19	173	29	21	25	160	38	27	30	85	38	42	45	1053
Northern Ireland	-	-	-	-	5	14	14	31	10	11	8	37	20	21	18	30	25	25	23	13	33	32	36	48
Scotland	-	-	-	-	20	14	16	20	27	23	13	49	28	24	21	34	34	30	34	35	37	33	40	150
Wales	-	-	-	-	13	19	6	9	16	13	12	37	20	17	20	16	29	26	34	13	36	31	30	54
UK	-	-	-	-	16	15	16	105	20	20	18	296	28	21	24	240	37	27	31	146	38	40	43	1305

**B: Percentage Bedroom Occupancy**

England	-	-	-	-	23	24	27	45	28	27	27	173	37	28	33	160	49	36	40	85	52	56	59	1053
Northern Ireland	-	-	-	-	7	21	19	31	13	17	12	37	28	31	27	30	34	30	29	13	47	42	49	48
Scotland	-	-	-	-	30	21	18	20	37	33	22	49	39	33	30	34	42	37	45	35	48	40	51	150
Wales	-	-	-	-	17	29	9	9	23	19	16	37	31	19	25	16	40	35	43	13	50	43	43	54
UK	-	-	-	-	23	24	25	105	29	27	25	296	37	28	32	240	47	36	41	146	51	53	57	1305

- 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)