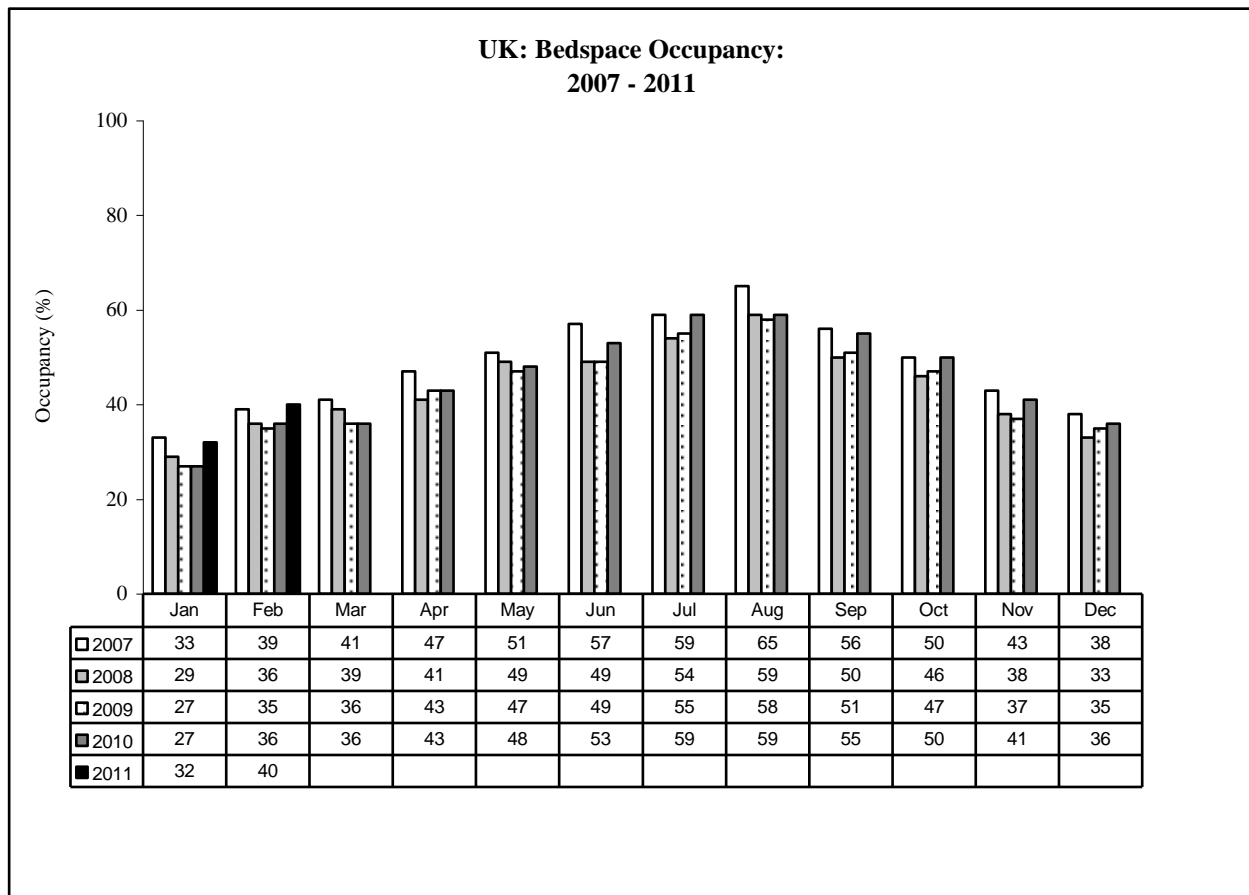


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

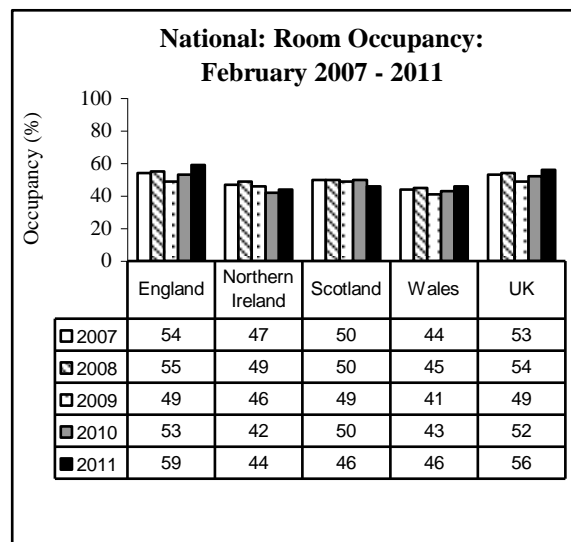
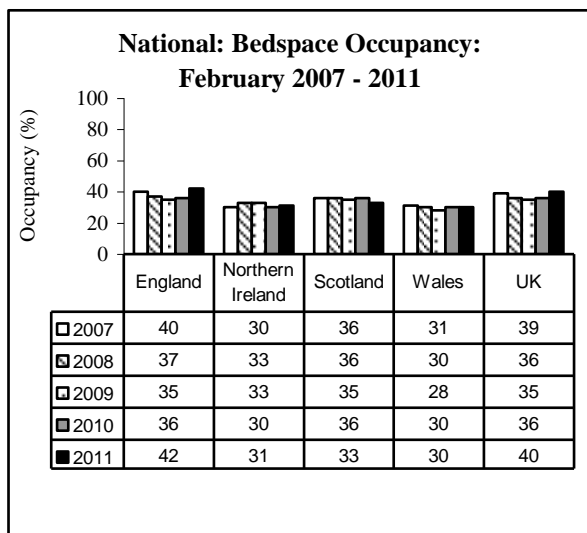
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

FEBRUARY 2011



- 2272 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 February 2011 was 40%, four percentage points higher than in February 2010. At 56%, room occupancy was also four percentage points higher than in February 2010.

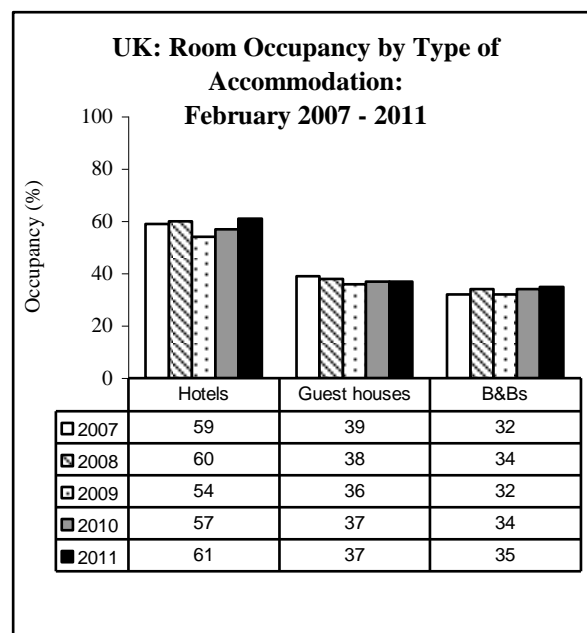
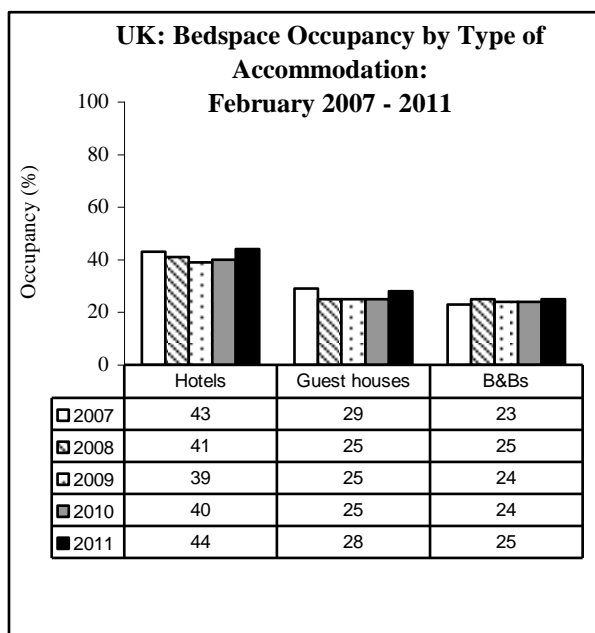


- Bedspace occupancy varied from 42% in England to 31% in Northern Ireland while room occupancy varied from 59% in England to 44% in Northern Ireland.
- When compared with February 2010, occupancy levels rose in England and Northern Ireland (by 6 percentage points in England and by 1 and 2 in Northern Ireland). In Wales, room occupancy rose by 3 percentage points with bedspace occupancy remaining unchanged while in Scotland occupancy levels fell by 3 and 4 percentage points.
- When compared with four years earlier, occupancy levels in England had risen (by 2 percentage points for bedspace occupancy and by 5 for room occupancy). In Northern Ireland bedspace occupancy had risen slightly but room occupancy had fallen by 3 percentage points while in Wales bedspace occupancy had fallen (by 1 percentage point) and room occupancy has risen (by 2 percentage points). In Scotland both measures of occupancy had fallen – by 3 percentage points (bedspace occupancy) and 4 (room occupancy).
- Bedspace occupancy by non-UK residents increased in England and Northern Ireland (by 2 and 1 percentage point respectively) and remained unchanged in 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	35	36	42	49	53	59	1239	1087	1598
Northern Ireland	33	30	31	46	42	44	181	143	203
Scotland	35	36	33	49	50	46	320	323	331
Wales	28	30	30	41	43	46	174	172	140
UK	35	36	40	49	52	56	1914	1725	2272

	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	26	29	29	4	3	5	13	8	9	14	10	15	1239	1087	1598
Northern Ireland	23	20	20	10	10	11	31	25	30	31	35	37	181	143	203
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	320	323	331
Wales	25	26	25	1	1	1	**	**	**	5	5	5	174	172	140
UK	26	29	29	4	3	5	13	8	9	14	10	15	1914	1725	2272

** figures not available



- Bedspace occupancy in all types of accommodation had risen by up to 4 percentage points when compared with February 2010. Room occupancy had also risen in hotels and bed and breakfast establishments but had remained at its February 2010 figure in guest houses (see Table 3).
- When compared with February 2010, two of the six size categories (those with 11-25 and more than 100 letting bedrooms) saw a rise in occupancy levels, with the greatest rise (of 8 percentage points) being in bedspace occupancy in the largest establishments. Establishments with 4-10 letting bedrooms experienced a slight rise in bedspace occupancy with room occupancy remaining unchanged while establishments with 26-50 letting bedrooms saw a 1 percentage point rise in room occupancy but a similar fall in bedspace occupancy. Establishments with 1-3 and 51-100 letting bedrooms experienced a fall in both measures of occupancy (see Table 5).
- When compared with February 2010, occupancy levels rose in all locations with the greatest rise (of 5 percentage points for bedspace occupancy) being in establishments in seaside locations (see Table 6).
- Only two tariff bands (those with a maximum tariff of £50.00-£59.00 and more than £60.00) showed an increase in occupancy levels when compared with February 2010, with the greatest rise (of 5 percentage points) being in room occupancy in the latter tariff band. Bedspace occupancy rose slightly in the £40.00-£49.99 tariff band with room occupancy falling (by 2 percentage points). Room occupancy also fell in the £30.00-£39.99 tariff band where bedspace occupancy remained at its 2010 figure, while the £20.00-£29.99 tariff band saw both measures of occupancy falling (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	39	40	45	54	58	63	379	349	962
Northern Ireland	39	38	37	55	53	53	67	68	70
Scotland	39	40	39	54	54	54	204	220	235
Wales	34	36	36	49	51	54	91	95	84
UK	39	40	44	54	57	61	741	732	1351
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	26	25	30	37	38	40	310	289	250
Northern Ireland	22	11	22	29	16	32	19	15	22
Scotland	25	25	23	36	35	30	56	54	52
Wales	20	21	16	26	29	19	40	34	19
UK	25	25	28	36	37	37	425	392	343
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	26	26	28	34	36	39	548	446	386
Northern Ireland	11	7	11	17	10	16	95	60	111
Scotland	19	19	14	28	28	19	60	49	44
Wales	13	16	17	20	22	22	43	43	37
UK	24	24	25	32	34	35	746	598	578

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: February 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	31	33	43	39	40	41	50	55	53	46	50	62	16	9	8	10	7	10	16	11	14	12	9	16
Northern Ireland	39	41	35	26	27	24	48	51	46	42	45	40	32	23	30	34	28	34	33	35	38	34	39	39
Scotland	41	42	39	31	32	30	48	49	46	48	50	47	-	-	-	-	-	-	-	-	-	-	-	-
Wales	31	35	35	25	26	26	40	43	45	42	42	45	-	-	-	-	-	-	4	5	4	6	4	6
UK	32	34	42	37	38	38	49	53	52	46	49	59	16	9	8	11	7	11	16	11	14	12	9	16

** figures not available

Table 5: Occupancy Levels by Size: February 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	19	21	21	259	26	26	26	364	30	32	35	134	38	40	39	94	43	49	45	58	41	38	49	689
Northern Ireland	6	3	7	97	22	10	18	31	26	26	26	28	31	28	26	15	35	35	36	19	56	47	44	13
Scotland	15	18	13	39	24	26	25	78	33	33	29	57	34	33	34	62	51	50	45	42	47	48	48	53
Wales	15	15	14	32	20	23	25	34	32	31	29	26	35	36	36	21	35	41	36	13	40	47	41	14
UK	18	20	19	427	25	25	26	507	30	32	34	245	37	39	38	192	43	48	44	132	42	40	48	769

B: Percentage Bedroom Occupancy

England	27	30	29	259	35	36	36	364	42	44	48	134	50	55	55	94	55	63	63	58	59	63	69	689
Northern Ireland	8	5	11	97	29	15	23	31	41	37	42	28	40	42	44	15	54	51	55	19	72	63	57	13
Scotland	24	27	17	39	36	36	34	78	45	44	42	57	46	45	49	62	65	66	61	42	65	66	67	53
Wales	21	19	19	32	27	32	29	34	42	40	43	26	50	50	51	21	51	59	60	13	60	65	64	14
UK	26	28	27	427	34	35	35	507	42	44	47	245	49	53	54	192	56	63	62	132	60	63	68	769

Table 6: Occupancy Levels by Location: February 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	226	42	45	50	587	32	32	36	363	28	28	32	422
Northern Ireland	27	25	29	41	39	35	37	66	34	29	21	61	17	20	13	35
Scotland	24	29	30	42	44	43	43	127	31	30	24	72	30	30	24	90
Wales	33	34	34	33	38	48	42	21	22	25	22	21	23	25	27	65
UK	29	28	33	342	42	45	48	801	31	31	33	517	28	28	30	612

B: Percentage Bedroom Occupancy

England	39	40	41	226	61	64	68	587	44	50	56	363	38	41	47	422
Northern Ireland	36	33	38	41	56	50	53	66	49	40	30	61	23	28	19	35
Scotland	32	37	40	42	61	60	62	127	48	43	36	72	40	41	33	90
Wales	44	44	46	33	59	67	63	21	36	40	44	21	31	34	36	65
UK	38	40	41	342	61	63	67	801	44	48	52	517	38	40	44	612

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): February 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	15	12	57	23	20	22	224	29	26	29	169	30	32	35	89	38	40	44	992
Northern Ireland	-	-	-	-	12	6	10	48	26	6	12	51	25	22	25	35	26	31	27	14	41	40	39	54
Scotland	8	-	-	-	21	27	17	29	32	30	21	67	32	34	26	33	36	39	38	35	42	43	41	166
Wales	-	-	-	-	15	16	13	13	15	17	18	39	28	28	27	18	38	40	44	16	35	37	35	54
UK	15	-	-	-	16	16	13	147	24	21	21	381	29	27	28	255	31	33	36	154	38	40	43	1266

B: Percentage Bedroom Occupancy

England	23	-	-	-	22	23	22	57	32	30	31	224	38	37	37	169	39	45	48	89	52	56	62	992
Northern Ireland	-	-	-	-	18	9	16	48	34	10	17	51	37	32	38	35	39	43	34	14	58	56	54	54
Scotland	15	-	-	-	31	41	23	29	49	44	32	67	46	50	36	33	53	49	47	35	57	58	58	166
Wales	-	-	-	-	23	22	17	13	22	24	23	39	39	43	37	18	48	50	57	16	51	53	56	54
UK	22	-	-	-	23	25	22	147	33	31	30	381	39	39	37	255	41	46	48	154	53	56	61	1266

- 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)