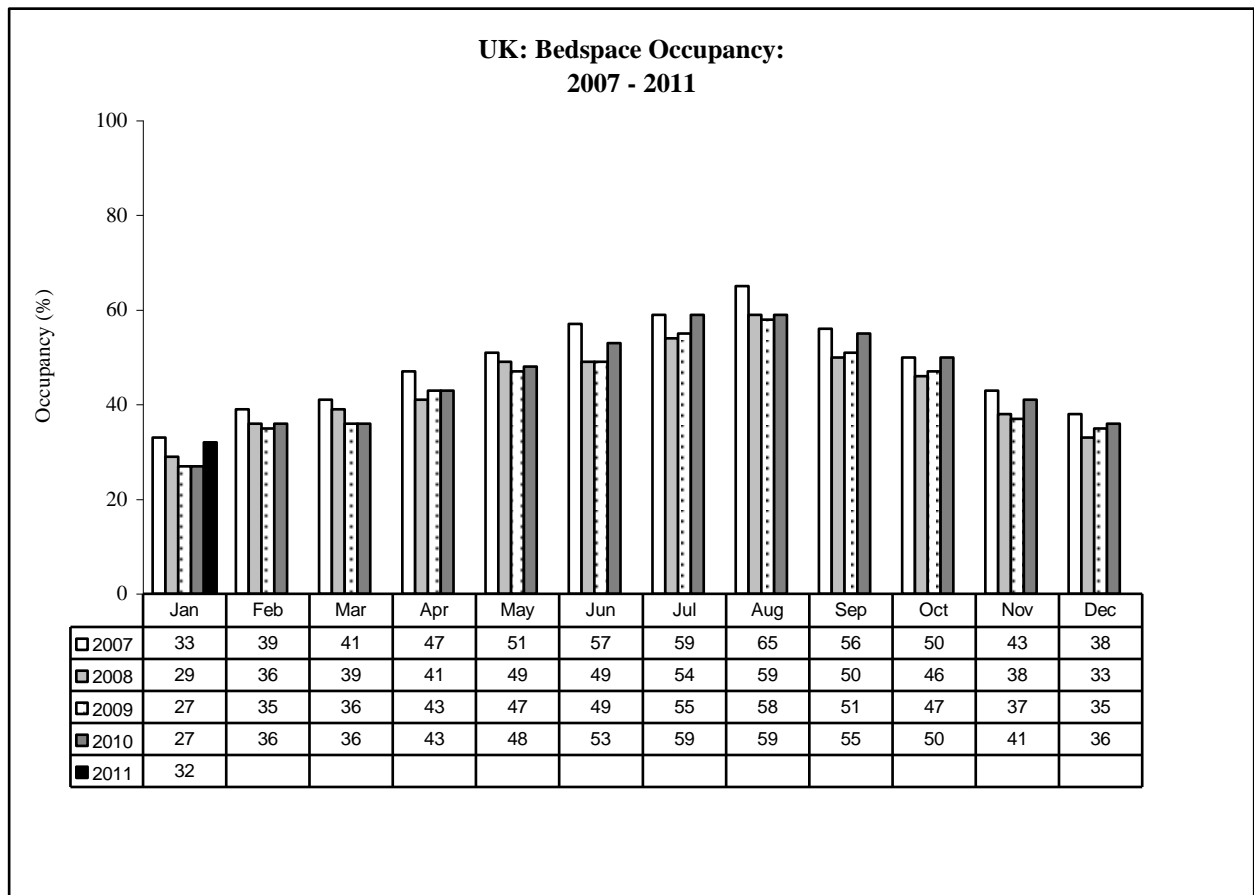


# UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

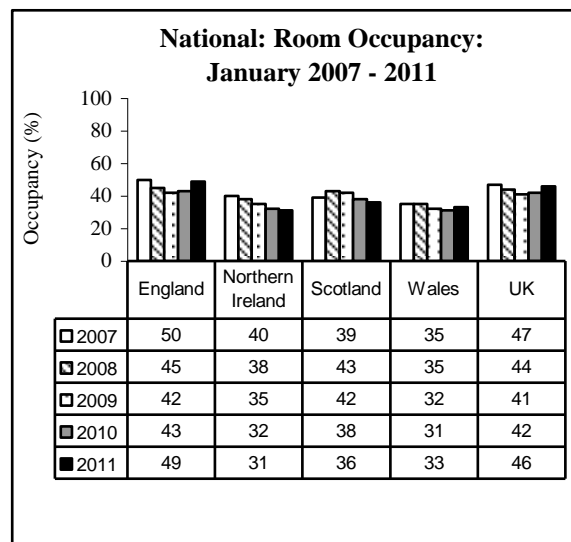
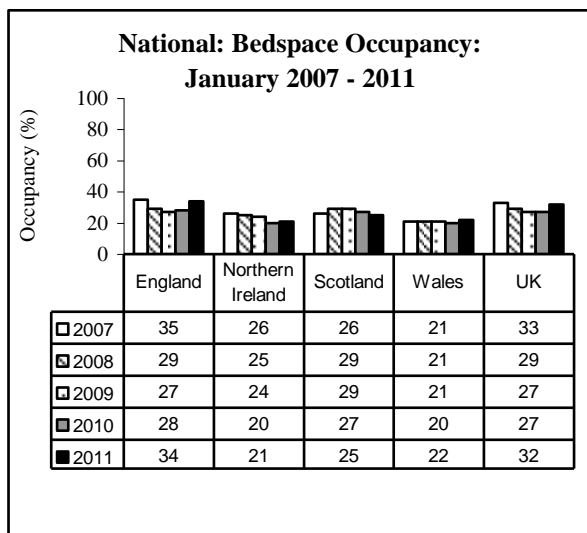
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

## JANUARY 2011



- 2222 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 January 2011 was 32%, five percentage points higher than in January 2010. At 46%, room occupancy was four percentage points higher than in January 2010.



- Bedspace occupancy varied from 34% in England to 21% in Northern Ireland while room occupancy varied from 49% in England to 31% in Northern Ireland.
- When compared with January 2010, occupancy levels rose in England and Wales (by 6 and 2 percentage points respectively). In Northern Ireland, bedspace occupancy rose by 1 percentage point but room occupancy fell by a similar amount. In Scotland occupancy levels fell by 2 percentage points.
- When compared with four years earlier, occupancy levels throughout the UK had fallen (by up to 9 and 5 percentage points – room and bedspace occupancy, Northern Ireland) with the exception of bedspace occupancy in Wales which had risen by 1 percentage point.
- Bedspace occupancy by non-UK residents remained at its January 2010 level in England, Wales and Northern Ireland (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

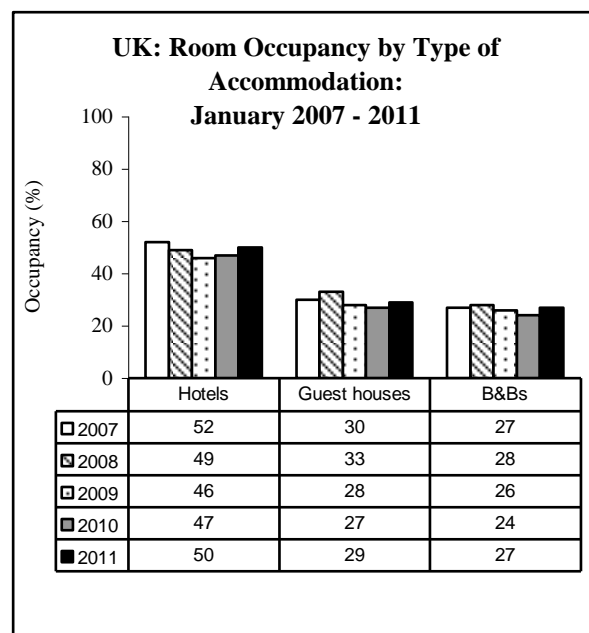
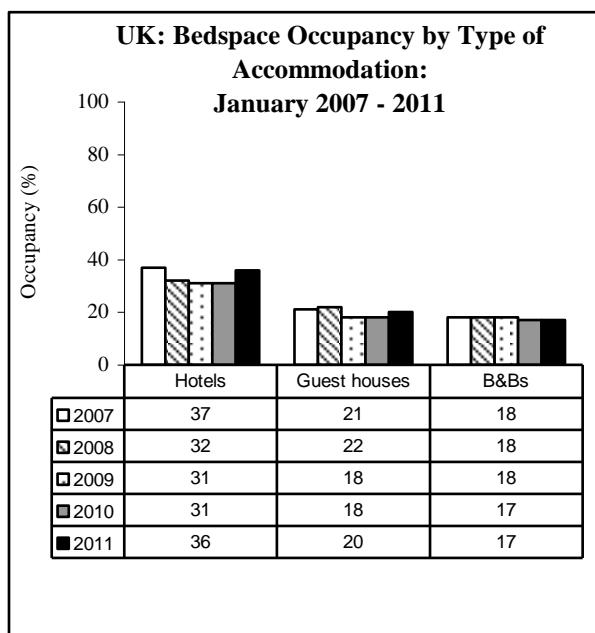
**Table 1: Occupancy Levels: January 2009 – 2011**

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	27	28	34	42	43	49	1191	1025	1567
Northern Ireland	24	20	21	35	32	31	184	140	182
Scotland	29	27	25	42	38	36	293	305	324
Wales	21	20	22	32	31	33	161	152	149
UK	27	27	32	41	42	46	1829	1622	2222

**Table 2: UK/Non-UK Occupancy Levels: January 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	19	19	21	4	5	5	16	20	13	17	22	20	1191	1025	1567
Northern Ireland	17	14	14	7	7	7	27	30	31	31	32	34	184	140	182
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	293	305	324
Wales	18	16	19	1	1	1	**	**	**	7	6	6	161	152	149
UK	19	19	21	4	5	5	16	20	13	17	21	20	1829	1622	2222

\*\* figures not available



- Occupancy levels in hotels and guest houses had risen (by up to 5 percentage points – bedspace occupancy, hotels) when compared with January 2010. In bed and breakfast establishments, room occupancy had risen with bedspace occupancy remaining unchanged (see Table 3).
- When compared with January 2010, four of the six size categories (those with 1-3, 11-25, 26-50 and more than 100 letting bedrooms) saw a rise in occupancy levels, with the greatest rise (of 7 percentage points) being in bedspace occupancy in the largest establishments. Establishments with 4-10 letting bedrooms experienced a slight rise in room occupancy with bedspace occupancy falling by a similar amount while both measures of occupancy fell in establishments with 51-100 letting bedrooms (see Table 5).
- When compared with January 2010, occupancy levels rose in all locations with the greatest rise (of 7 percentage points) being in establishments in city/large town locations (see Table 6).
- Only the most expensive establishments (those with a maximum tariff of more than £60.00) showed an increase in both measures of occupancy when compared with January 2010. Bedspace occupancy rose slightly in the £40.00-£49.99 tariff band with room occupancy remaining unchanged. Room occupancy rose slightly in the £30.00-£39.99 tariff band but all other occupancy levels fell slightly (see Table 7 and note 5a, page 7 (sample sizes)).

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

<b>a: Hotels</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	31	32	37	46	48	52	389	344	965
Northern Ireland	29	23	26	42	39	37	69	70	71
Scotland	32	31	32	46	43	44	200	207	232
Wales	26	26	26	39	38	40	91	83	90
UK	31	31	36	46	47	50	749	704	1358
<b>b: Guest Houses</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	19	19	22	29	29	32	279	264	232
Northern Ireland	11	14	14	16	17	18	22	13	17
Scotland	17	15	13	25	23	21	46	50	50
Wales	13	11	13	18	17	17	34	30	20
UK	18	18	20	28	27	29	381	357	319
<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	19	18	19	27	26	30	518	415	370
Northern Ireland	10	7	9	13	11	15	93	57	9
Scotland	15	12	10	22	17	15	47	48	42
Wales	11	10	9	16	14	13	36	39	39
UK	18	17	17	26	24	27	694	559	460

**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: January 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	26	27	34	29	29	34	46	47	54	37	39	42	17	21	15	14	18	11	18	22	21	16	21	19
Northern Ireland	29	30	25	19	21	17	37	38	32	34	35	29	34	28	28	29	35	38	34	32	33	32	36	38
Scotland	30	30	27	28	25	24	36	35	33	44	40	39	**	**	**	**	**	**	**	**	**	**	**	**
Wales	22	22	24	20	19	19	28	28	30	35	33	34	**	**	**	**	**	**	5	5	5	8	6	7
UK	26	27	32	28	28	31	44	44	49	38	39	41	17	21	15	14	18	12	17	21	20	16	20	19

\*\* figures not available

**Table 5: Occupancy Levels by Size: January 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	14	14	15	249	20	18	18	334	26	22	25	139	31	30	31	91	37	40	38	60	29	32	41	694
Northern Ireland	5	4	5	84	14	15	16	23	21	18	17	28	23	12	22	13	30	21	24	21	35	34	33	13
Scotland	10	9	9	38	23	18	15	70	25	22	23	55	27	24	26	61	42	44	38	46	37	37	38	54
Wales	10	8	8	32	18	13	15	39	24	22	24	22	28	27	27	27	24	31	28	14	27	32	29	15
UK	13	13	14	403	20	18	17	466	26	22	24	244	30	29	30	192	37	40	37	141	30	33	40	776

**B: Percentage Bedroom Occupancy**

England	21	22	23	249	28	27	28	334	37	33	38	139	43	42	45	91	51	52	52	60	50	54	59	694
Northern Ireland	6	6	8	84	20	19	26	23	33	29	24	28	34	25	33	13	42	34	39	21	52	49	42	13
Scotland	15	13	13	38	33	25	23	70	36	31	34	55	39	34	37	61	55	56	50	46	54	53	55	54
Wales	13	11	11	32	24	20	20	39	36	31	38	22	41	40	37	27	36	45	45	14	47	46	44	15
UK	20	20	21	403	28	26	27	466	37	33	37	244	42	41	43	192	50	52	51	141	50	53	57	776

**Table 6: Occupancy Levels by Location: January 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	23	20	24	207	33	35	44	593	27	24	28	356	20	18	22	411
Northern Ireland	18	14	20	38	29	22	27	59	28	22	14	57	13	19	11	28
Scotland	19	19	18	37	34	33	34	128	28	22	20	72	24	24	19	87
Wales	26	24	24	33	30	38	32	25	16	12	14	22	17	15	18	69
UK	23	20	23	315	33	35	42	805	26	23	26	507	20	19	21	595

**B: Percentage Bedroom Occupancy**

England	31	30	35	207	52	53	59	593	40	39	44	356	32	29	36	411
Northern Ireland	23	24	26	38	43	36	39	59	42	32	20	57	19	27	16	28
Scotland	28	27	26	37	49	47	49	128	42	32	29	72	33	31	26	87
Wales	34	32	33	33	49	53	46	25	27	20	30	22	24	22	26	69
UK	31	30	33	315	51	52	57	805	39	37	41	507	31	29	34	595

**Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): January 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	20	-	-	-	14	12	11	53	16	14	15	195	25	18	19	165	21	26	26	87	29	30	37	1001
Northern Ireland	-	-	-	-	12	8	9	39	13	7	10	46	17	15	16	29	23	18	20	14	31	25	27	53
Scotland	19	-	-	-	23	23	9	28	25	21	13	58	26	24	19	38	29	28	26	35	32	34	34	165
Wales	-	-	-	-	12	14	13	11	11	11	11	46	20	15	17	18	33	34	32	14	28	26	27	60
UK	20	-	-	-	15	13	11	131	17	15	14	345	25	18	19	250	23	27	26	150	29	30	36	1279

**B: Percentage Bedroom Occupancy**

England	33	-	-	-	20	18	20	53	24	22	24	195	36	26	26	165	29	37	37	87	44	45	52	1001
Northern Ireland	-	-	-	-	16	9	16	39	18	10	14	46	28	25	28	29	35	26	26	14	45	42	38	53
Scotland	31	-	-	-	34	36	15	28	40	30	23	58	37	34	29	38	46	37	33	35	44	47	48	165
Wales	-	-	-	-	17	18	17	11	16	17	16	46	31	26	27	18	43	40	43	14	41	39	41	60
UK	33	-	-	-	21	20	19	131	25	22	23	345	36	27	27	250	32	37	36	150	44	45	51	1279

- 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)