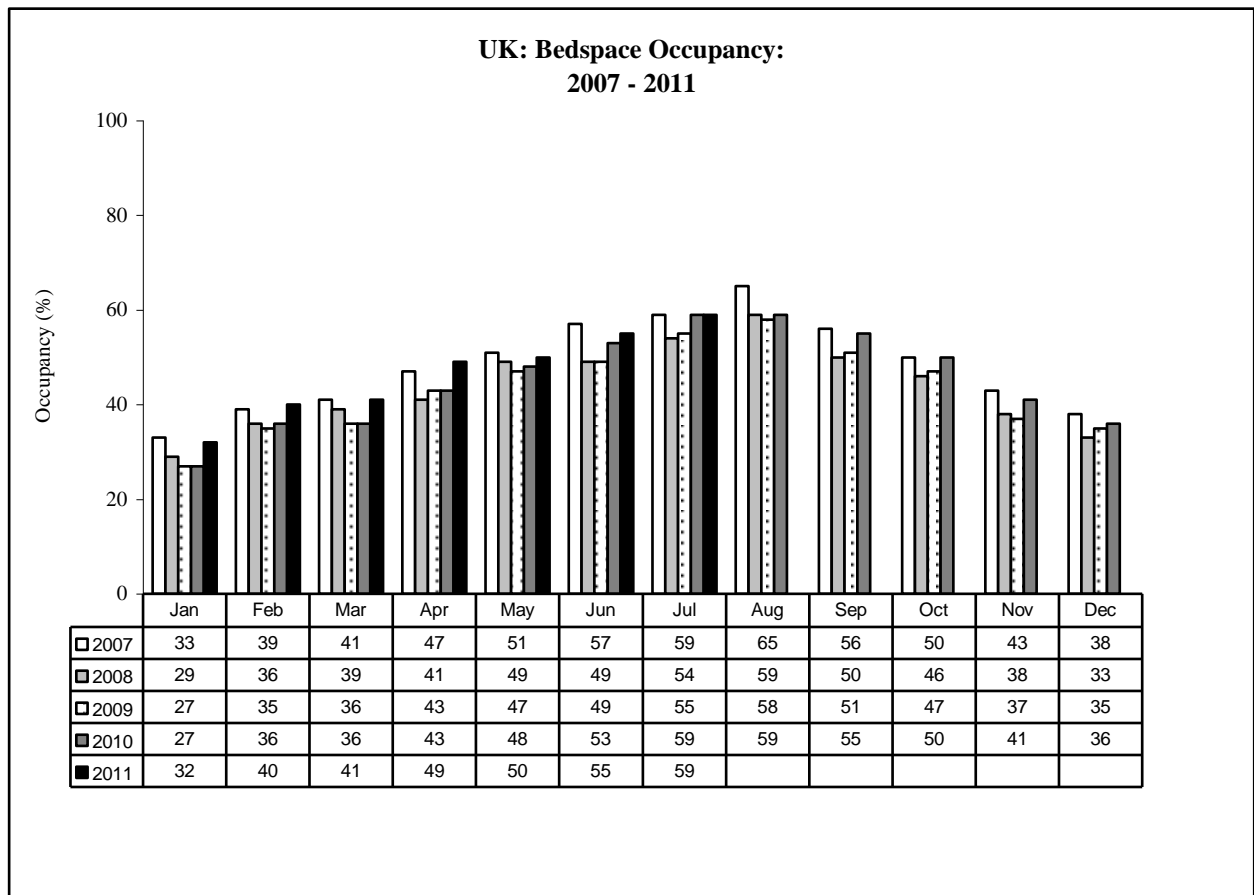


# UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

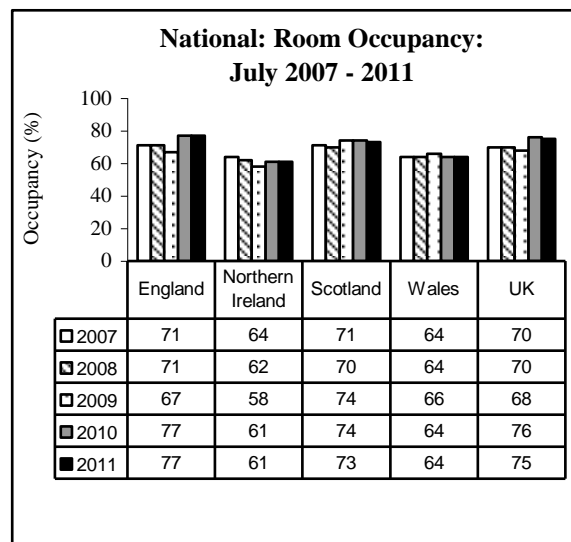
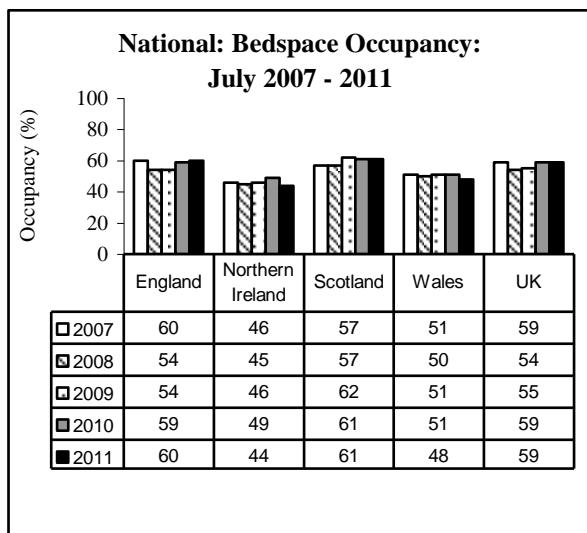
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

## JULY 2011



- 2425 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 July 2011 was 59%, the same as in July 2010. At 75%, room occupancy was one percentage point lower than in July 2010.



- Bedspace occupancy varied from 61% in Scotland to 44% in Northern Ireland while room occupancy varied from 77% in England to 61% in Northern Ireland.
- When compared with July 2010, room occupancy levels remained unchanged in England, Wales and Northern Ireland but fell slightly in Scotland. Bedspace occupancy rose slightly in England, remained at its 2010 level in Scotland and fell in Wales and Northern Ireland (by 3 and 5 percentage points respectively).
- When compared with four years earlier, occupancy levels had risen in Scotland but had fallen in Northern Ireland. In England, room occupancy had risen (by 6 percentage points) with bedspace occupancy remaining as in July 2007 while in Wales room occupancy was unchanged but bedspace occupancy had fallen (by 3 percentage points) compared with July 2007.
- Bedspace occupancy by non-UK residents increased slightly in Northern Ireland and remained as in July 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)).

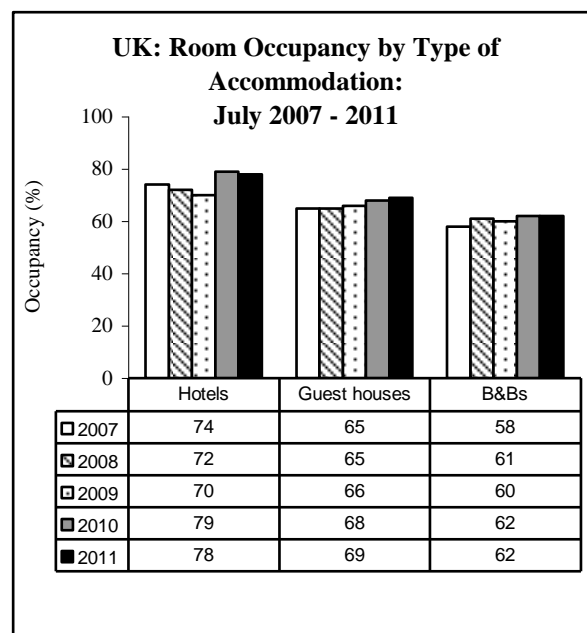
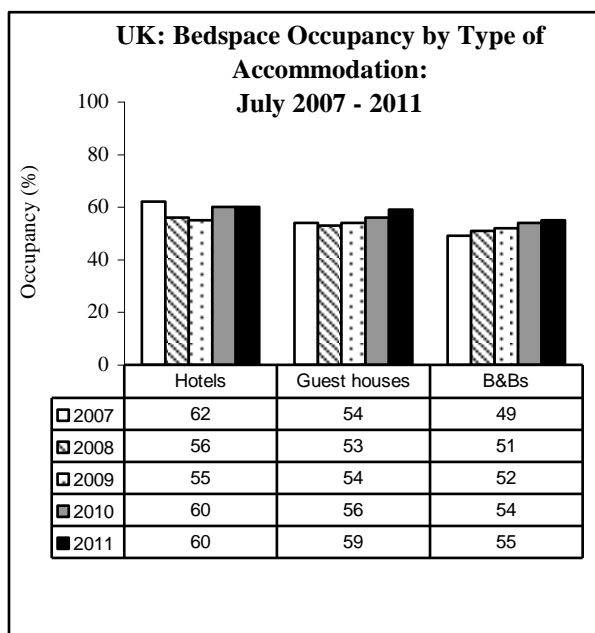
**Table 1: Occupancy Levels: July 2009 – 2011**

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	54	59	60	67	77	77	1265	1682	1725
Northern Ireland	46	49	44	58	61	61	150	146	163
Scotland	62	61	61	74	74	73	388	399	373
Wales	51	51	48	66	64	64	197	201	164
UK	55	59	59	68	76	75	2000	2428	2425

**Table 2: UK/Non-UK Occupancy Levels: July 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	46	49	50	8	9	9	14	11	15	14	15	16	1265	1682	1725
Northern Ireland	31	29	22	15	21	22	36	32	37	33	42	49	150	146	163
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	388	399	373
Wales	45	43	44	5	5	5	**	**	**	10	10	10	197	201	164
UK	46	48	49	8	9	9	14	11	15	14	15	16	2000	2428	2425

\*\* figures not available



- Occupancy levels in guest houses had risen when compared with July 2010, with bedspace occupancy rising slightly more than room occupancy. In bed and breakfast establishments bedspace occupancy had risen slightly with room occupancy unchanged while in hotels bedspace occupancy was as in July 2010 but room occupancy had fallen slightly (see Table 3).
- Across the size categories there was very little change when compared with July 2010. Bedspace occupancy rose slightly in establishments with 11-25 letting bedrooms, remained unchanged in those with 1-3 and 51-100 letting bedrooms and fell slightly in those with 4-10, 26-50 and more than 100 letting bedrooms. Room occupancy rose in establishments with 1-3 and 11-25 letting bedrooms (by 1 and 2 percentage points respectively) and was as in the previous year in the remaining four size categories (see Table 5).
- When compared with July 2010, occupancy levels rose in seaside locations and fell in city/large town locations. In country/village locations room occupancy rose (by 3 percentage points) with bedspace occupancy remaining unchanged while in small town locations room occupancy rose slightly with bedspace occupancy showing a small fall (see Table 6).
- Establishments in two tariff bands (those with maximum charges of £40.00-£49.99 and £50.00-£59.99) experienced a rise in both measures of occupancy when compared with July 2010. The most expensive establishments (those with a maximum charge of more than £60.00) showed a slight rise in room occupancy with bedspace occupancy remaining unchanged. In establishments in the £20.00-£29.99 tariff band, room occupancy was as in July 2010 and bedspace occupancy fell by 3 percentage points while establishments in the £30.00-£39.99 tariff band experienced a 5 percentage point fall in both measures of occupancy (see Table 7 and note 5a, page 7 (sample sizes)).

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

<b>a: Hotels</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	54	60	61	69	80	79	383	962	1041
Northern Ireland	51	53	48	64	67	66	50	69	70
Scotland	62	62	63	76	76	77	228	247	239
Wales	54	55	51	71	71	70	95	104	85
UK	55	60	60	70	79	78	756	1382	1435
<b>b: Guest Houses</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	54	57	60	66	69	70	312	287	265
Northern Ireland	33	37	23	43	45	40	17	19	12
Scotland	61	58	65	71	69	73	69	67	60
Wales	50	42	40	60	54	50	42	39	28
UK	54	56	59	66	68	69	440	412	365
<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	51	54	53	60	63	65	568	433	419
Northern Ireland	38	37	31	43	43	41	83	58	81
Scotland	62	63	49	68	67	56	91	85	74
Wales	42	43	42	50	50	49	60	58	51
UK	52	54	51	60	62	62	802	634	625

**Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: July 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	51	63	63	58	56	56	68	76	75	67	78	80	16	10	13	11	14	18	15	14	15	13	16	17
Northern Ireland	46	53	43	46	45	39	57	63	58	59	59	59	38	32	35	38	38	37	35	40	52	35	42	54
Scotland	65	65	63	60	59	59	74	73	72	75	74	75	**	**	**	**	**	**	**	**	**	**	**	**
Wales	56	55	51	48	47	46	65	65	62	65	64	66	**	**	**	**	**	**	8	8	9	11	12	10
UK	53	63	62	57	56	55	68	75	74	68	76	78	16	10	13	12	15	18	15	14	15	13	16	17

\*\* figures not available

**Table 5: Occupancy Levels by Size: July 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	44	47	50	289	54	56	55	376	50	57	57	130	56	61	60	102	60	60	61	52	54	61	60	776
Northern Ireland	29	28	23	71	43	45	40	18	37	43	33	27	46	51	37	13	47	54	43	22	57	57	58	12
Scotland	60	58	46	65	57	59	63	87	59	57	62	67	63	62	62	59	69	67	64	46	64	65	64	49
Wales	39	38	38	41	50	49	45	51	54	52	52	28	51	53	52	22	57	54	48	15	61	62	50	7
UK	46	48	48	466	54	56	55	532	51	56	57	252	56	60	59	196	61	60	60	135	56	61	60	844

**B: Percentage Bedroom Occupancy**

England	52	56	59	289	64	66	66	376	61	69	71	130	70	76	76	102	73	78	78	52	72	84	84	776
Northern Ireland	36	35	33	71	51	50	45	18	51	56	53	27	53	63	68	13	64	71	69	22	70	69	68	12
Scotland	67	64	53	65	71	69	72	87	70	67	71	67	74	76	76	59	85	83	79	46	80	83	84	49
Wales	46	45	45	41	61	60	55	51	68	65	68	28	66	68	68	22	73	72	72	15	82	81	71	7
UK	53	56	57	466	64	66	66	532	62	68	70	252	70	75	75	196	74	78	78	135	74	83	83	844

**Table 6: Occupancy Levels by Location: July 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	56	57	62	261	55	63	63	617	51	54	54	379	52	55	56	468
Northern Ireland	48	55	52	31	46	50	47	54	51	48	27	48	43	44	33	30
Scotland	64	62	65	53	63	65	62	122	56	58	55	76	62	58	60	122
Wales	58	58	56	43	52	53	42	16	50	48	45	22	48	47	46	83
UK	57	58	62	388	56	62	61	809	52	54	53	525	53	55	55	703

**B: Percentage Bedroom Occupancy**

England	67	70	70	261	71	84	82	617	63	71	74	379	62	66	69	468
Northern Ireland	62	66	70	31	58	63	65	54	65	54	42	48	51	52	41	30
Scotland	73	71	77	53	78	81	79	122	72	71	67	76	71	67	67	122
Wales	71	72	71	43	73	68	64	16	70	70	66	22	58	56	57	83
UK	68	70	71	388	72	82	80	809	65	71	72	525	63	65	68	703

**Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): July 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	45	-	-	-	37	37	37	57	50	52	47	215	54	58	59	190	55	56	60	94	58	60	60	1089
Northern Ireland	-	-	-	-	34	35	25	32	40	39	38	37	38	36	29	28	45	45	44	9	52	55	49	56
Scotland	-	-	-	-	56	58	45	32	55	56	54	73	57	59	63	45	61	55	61	41	66	65	64	181
Wales	-	-	-	-	37	34	28	15	47	46	42	53	46	45	53	24	52	50	51	14	58	58	50	58
UK	44	-	-	-	39	40	37	136	50	52	47	378	54	57	59	287	55	55	59	158	59	60	60	1384

**B: Percentage Bedroom Occupancy**

England	55	-	-	-	46	47	50	57	60	62	57	215	65	68	70	190	68	70	72	94	71	79	80	1089
Northern Ireland	-	-	-	-	39	40	36	32	50	47	49	37	47	49	54	28	55	46	53	9	66	68	66	56
Scotland	-	-	-	-	62	64	52	32	78	75	68	73	69	70	73	45	70	62	70	41	79	80	78	181
Wales	-	-	-	-	41	40	34	15	57	56	53	53	61	58	67	24	68	73	70	14	73	72	69	58
UK	55	-	-	-	48	49	49	136	62	63	58	378	65	67	70	287	68	69	71	158	72	78	79	1384

- 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)