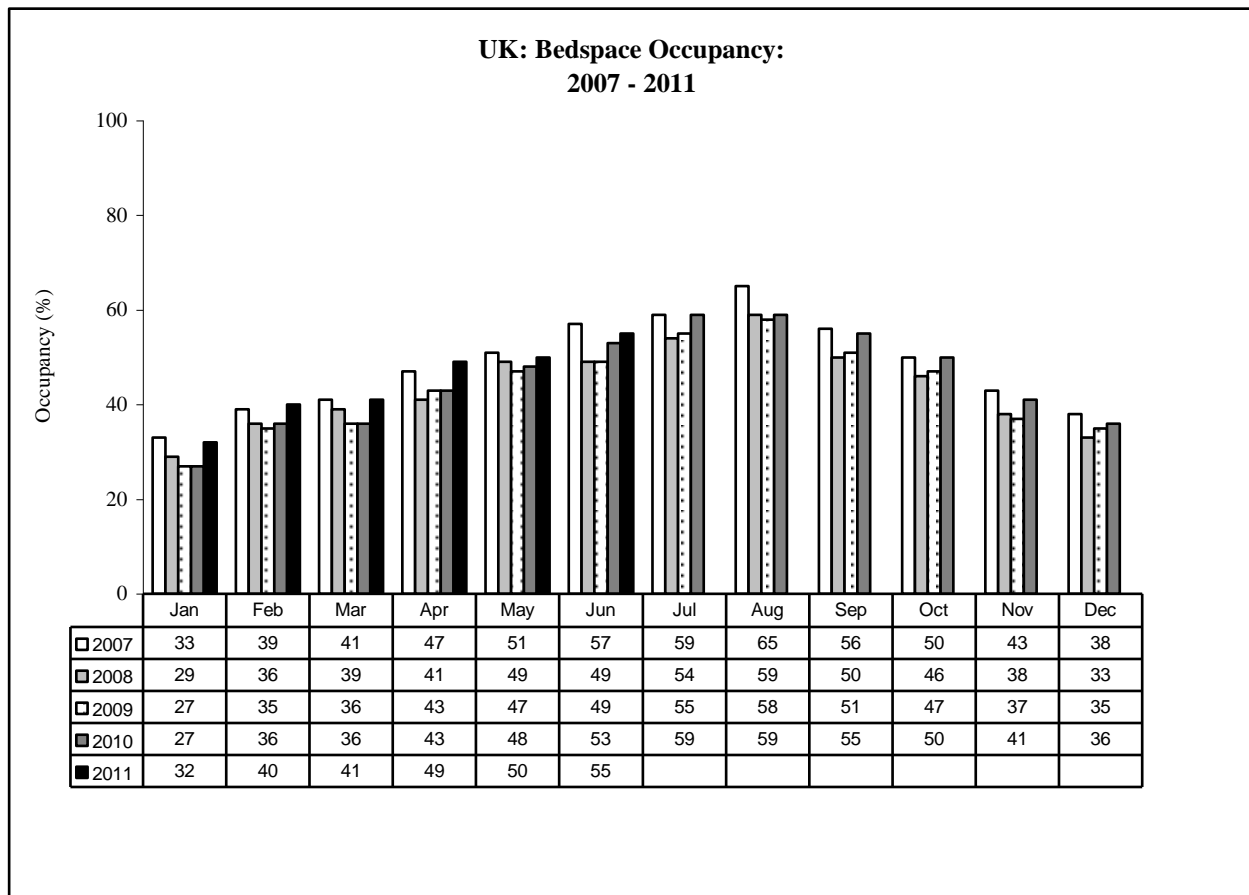


# UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

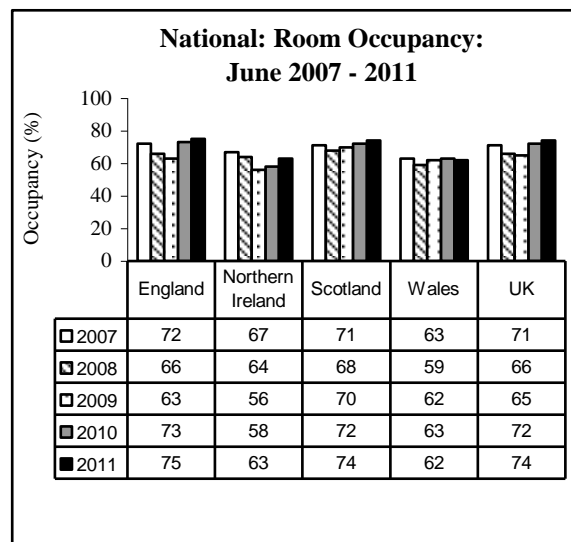
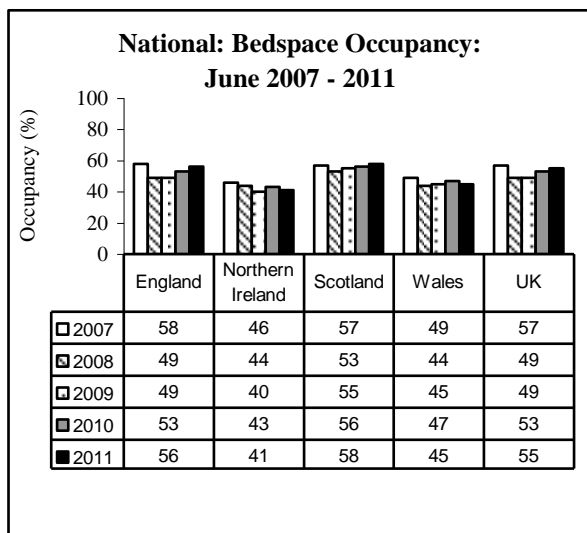
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

## JUNE 2011



- 2404 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 June 2011 was 55%, two percentage points higher than in June 2010. At 74%, room occupancy was also two percentage points higher than in June 2010.



- Bedspace occupancy varied from 58% in Scotland to 41% in Northern Ireland while room occupancy varied from 75% in England to 62% in Wales.
- When compared with June 2010, occupancy levels rose (by up to 3 percentage points) in England and Scotland. In Northern Ireland, room occupancy rose by 5 percentage points but bedspace occupancy fell by 2 percentage points. In Wales both measures of occupancy fell – by 1 percentage point for room occupancy and by 2 for bedspace occupancy.
- When compared with four years earlier, occupancy levels had risen in Scotland but had fallen in Wales and Northern Ireland. In England, room occupancy had risen (by 3 percentage points) but bedspace occupancy had fallen (by 2 percentage points).
- Bedspace occupancy by non-UK residents increased in Northern Ireland, England and Wales (by 7, 3 and 1 percentage points respectively (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

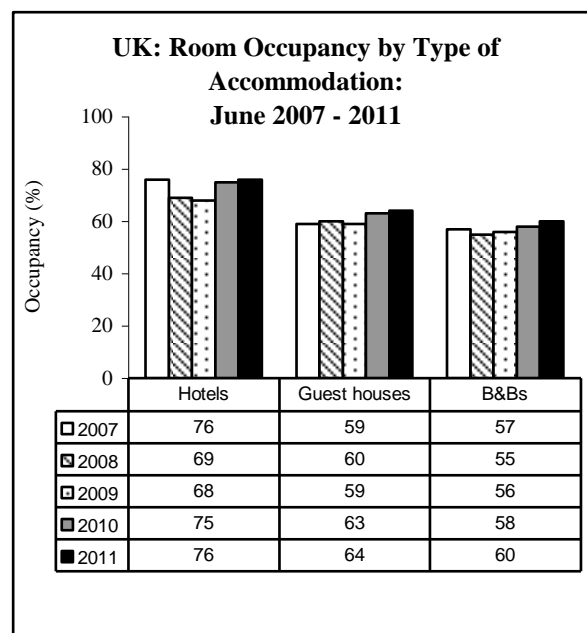
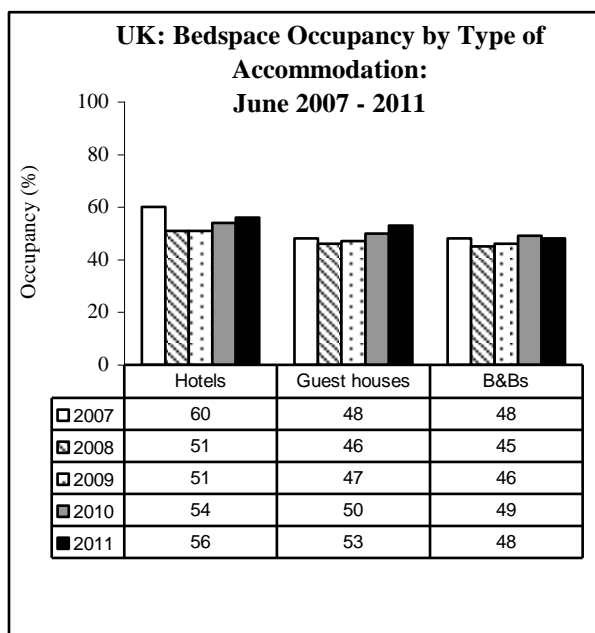
**Table 1: Occupancy Levels: June 2009 – 2011**

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	49	53	56	65	73	75	1303	1717	1705
Northern Ireland	40	43	41	56	58	63	159	157	162
Scotland	55	56	58	70	72	74	383	405	376
Wales	45	47	45	62	63	62	214	206	161
UK	49	53	55	65	72	74	2059	2485	2404

**Table 2: UK/Non-UK Occupancy Levels: June 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	42	45	46	7	7	10	14	11	15	14	14	18	1303	1717	1705
Northern Ireland	25	25	16	14	18	25	38	35	44	36	42	61	159	157	162
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	383	405	376
Wales	40	40	41	3	3	4	**	**	**	8	8	9	214	206	161
UK	42	44	45	7	7	10	14	12	16	14	14	18	2059	2485	2404

\*\* figures not available



- Occupancy levels in hotels and guest houses had risen when compared with June 2010, with bedspace occupancy rising slightly more than room occupancy. In bed and breakfast establishments room occupancy had risen but bedspace occupancy had fallen slightly (see Table 3).
- When compared with June 2010, both room and bedspace occupancy had risen in three size categories – those with 1-3, 11-25 and more than 100 letting bedrooms. Establishments with 51-100 letting bedrooms saw a rise (of 4 percentage points) in bedspace occupancy with room occupancy remaining as in 2010, while in establishments with 4-10 letting bedrooms, room occupancy rose slightly and bedspace occupancy was unchanged. Establishments with 26-50 letting bedrooms recorded a slight rise in room occupancy but a similar fall in bedspace occupancy (see Table 5).
- When compared with June 2010, occupancy levels rose in seaside, city/large town and country/village locations but fell in small town locations (see Table 6).
- Establishments in the three most expensive tariff bands (those with maximum charges of £40.00-£49.99, £50.00-£59.99 and more than £60.00) experienced a rise in both measures of occupancy when compared with June 2011, with the greatest rises (of 6 percentage point for bedspace occupancy and 5 for room occupancy) being in establishments in the £40.00-£49.99 tariff band. The remaining two tariff bands (those with maximum charges of £20.00-£29.99 and £30.00-£39.99) saw a fall in both measures of occupancy (see Table 7 and note 5a, page 7 (sample sizes)).

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

<b>a: Hotels</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	50	54	57	68	76	77	404	977	1033
Northern Ireland	45	48	44	65	66	69	52	73	62
Scotland	56	57	59	72	75	77	226	255	245
Wales	49	51	47	68	69	66	103	110	80
UK	51	54	56	68	75	76	785	1415	1420
<b>b: Guest Houses</b>									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	46	51	54	58	65	65	313	296	264
Northern Ireland	26	24	26	34	33	34	19	17	17
Scotland	54	50	60	67	63	71	71	66	58
Wales	48	42	41	59	53	51	45	39	28
UK	47	50	53	59	63	64	448	418	367
<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	46	49	48	57	59	61	584	444	408
Northern Ireland	25	28	24	31	37	33	88	67	83
Scotland	54	54	51	61	61	60	86	84	73
Wales	29	38	41	36	47	48	66	57	53
UK	46	49	48	56	58	60	824	652	617

	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	46	55	58	53	52	53	67	68	71	64	77	78	16	9	13	11	13	17	15	13	18	13	15	20
Northern Ireland	46	47	45	36	38	37	57	60	63	55	57	63	37	37	42	42	39	49	35	43	64	39	46	68
Scotland	59	59	61	54	54	56	68	69	72	71	73	76	**	**	**	**	**	**	**	**	**	**	**	**
Wales	51	52	49	42	44	43	61	63	61	61	63	62	**	**	**	**	**	**	7	7	8	9	8	9
UK	48	55	58	52	52	52	67	68	70	65	75	76	16	10	14	12	14	18	15	13	18	13	15	20

\*\* figures not available

<b>a: Percentage Bedspace Occupancy</b>																								
	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	40	43	46	278	46	50	49	373	46	51	51	129	52	58	56	93	57	56	61	52	47	52	56	780
Northern Ireland	17	21	20	73	34	31	34	22	33	37	30	30	36	40	47	10	43	47	35	16	53	56	52	11
Scotland	51	51	48	64	53	52	60	86	52	49	57	71	53	58	58	58	65	61	62	46	56	60	60	51
Wales	28	32	32	44	43	46	45	47	49	48	48	30	47	50	49	21	49	53	48	14	60	62	45	5
UK	40	43	45	459	47	50	50	528	47	50	51	260	52	57	56	182	57	56	60	128	49	54	56	847
<b>B: Percentage Bedroom Occupancy</b>																								
England	49	52	55	278	58	61	61	373	59	66	66	129	68	73	74	93	73	78	78	52	71	77	82	780
Northern Ireland	22	28	27	73	41	40	40	22	49	54	50	30	49	56	63	10	63	64	66	16	75	76	76	11
Scotland	59	59	57	64	65	64	71	86	66	63	70	71	67	74	74	58	83	81	81	46	77	83	84	51
Wales	35	40	40	44	53	58	56	47	66	65	65	30	65	66	66	21	74	75	73	14	80	79	62	5
UK	49	52	54	459	58	61	62	528	60	65	66	260	67	72	73	182	74	78	78	128	72	78	81	847

**Table 6: Occupancy Levels by Location: June 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	48	53	57	263	50	55	60	616	48	51	49	379	47	52	53	447
Northern Ireland	36	45	44	34	44	46	46	47	40	35	28	47	33	35	24	34
Scotland	56	58	65	55	58	58	59	123	50	51	51	79	53	53	56	119
Wales	53	57	52	41	52	48	39	14	43	45	42	19	41	43	45	87
UK	49	54	57	393	51	55	58	800	48	50	48	524	47	51	52	687

**B: Percentage Bedroom Occupancy**

England	63	66	67	263	71	79	81	616	64	69	68	379	58	64	68	447
Northern Ireland	51	61	58	34	63	64	72	47	57	52	43	47	44	45	40	34
Scotland	67	70	77	55	77	78	81	123	67	67	66	79	63	64	66	119
Wales	68	72	67	41	74	69	59	14	64	67	65	19	52	54	58	87
UK	64	67	68	393	72	78	79	800	64	68	67	524	58	63	67	687

**Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): June 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	27	-	-	-	32	35	29	62	41	45	39	216	50	52	57	183	48	53	56	95	51	55	57	1069
Northern Ireland	-	-	-	-	25	32	22	30	27	22	23	46	28	27	36	23	43	40	53	11	46	50	44	50
Scotland	-	-	-	-	47	49	45	36	51	48	52	72	57	55	60	44	56	56	61	42	60	57	61	181
Wales	-	-	-	-	29	26	23	19	38	43	43	49	45	43	50	26	46	51	51	15	53	53	46	52
UK	27	-	-	-	34	36	31	147	42	45	41	383	50	51	57	276	49	53	56	163	52	55	57	1352

**B: Percentage Bedroom Occupancy**

England	36	54	-	-	41	44	40	62	51	55	51	216	63	63	67	183	63	66	68	95	68	76	78	1069
Northern Ireland	-	-	-	-	31	37	28	30	36	32	31	46	41	43	53	23	54	51	67	11	68	68	70	50
Scotland	-	-	-	-	57	57	55	36	69	68	64	72	69	68	74	44	68	65	75	42	75	75	79	181
Wales	-	-	-	-	33	35	30	19	48	55	54	49	57	58	65	26	62	66	73	15	73	72	65	52
UK	36	-	-	-	42	45	41	147	53	56	53	383	63	63	68	276	63	66	69	163	69	76	77	1352

- 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)