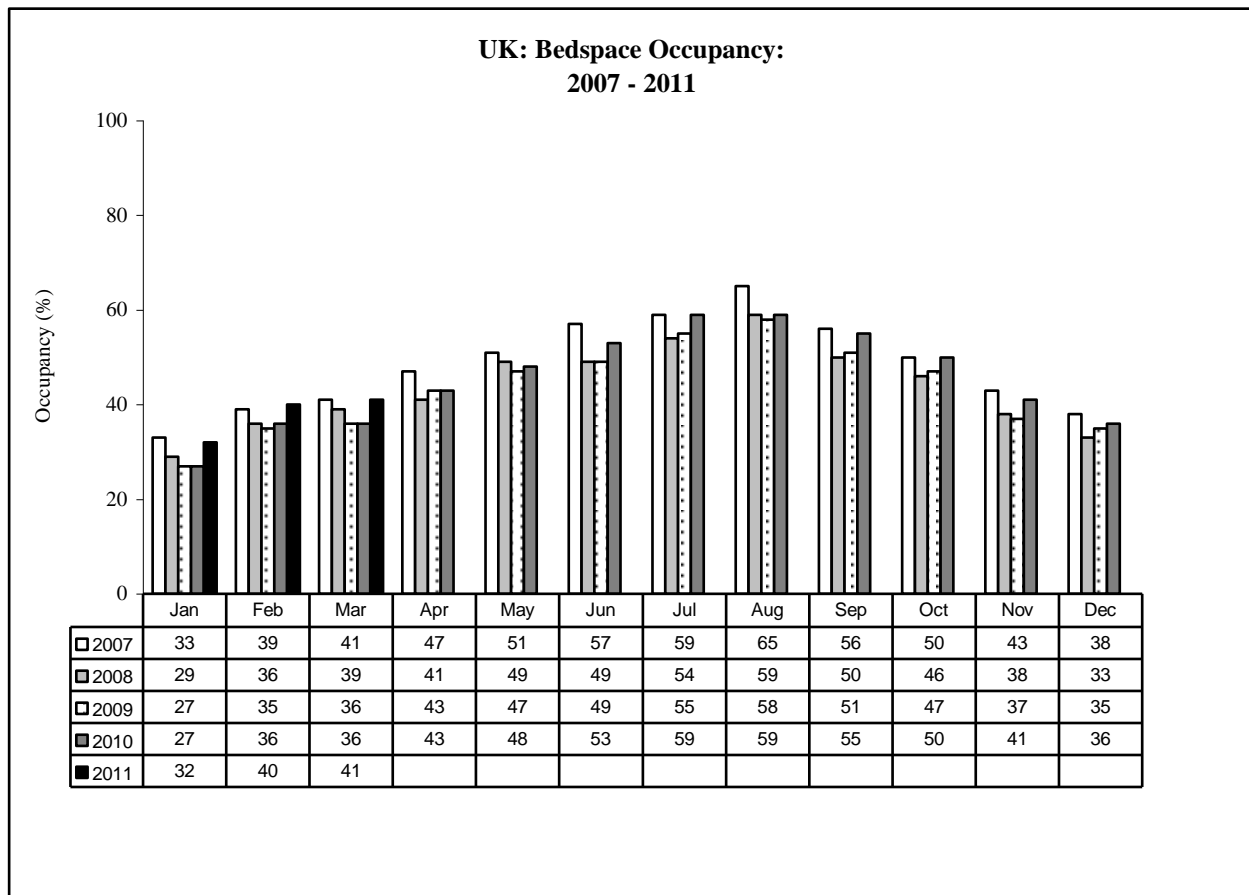


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

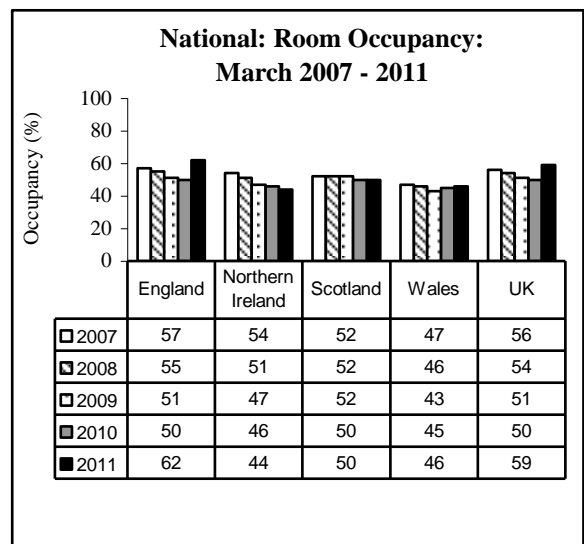
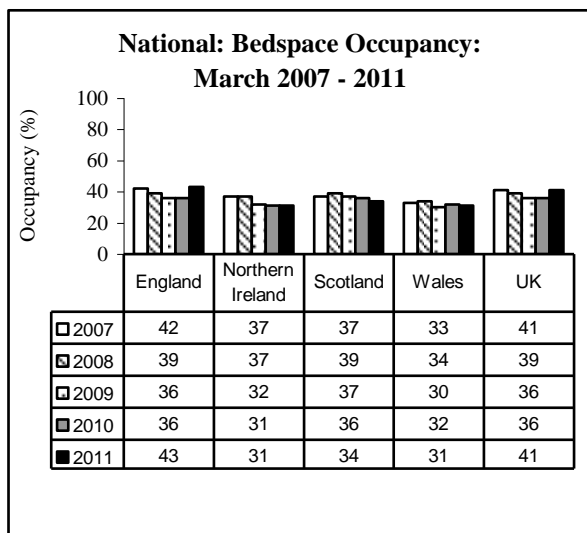
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

MARCH 2011



- 2345 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 March 2011 was 41%, five percentage points higher than in March 2010. At 59%, room occupancy was nine percentage points higher than in March 2010.



- Bedspace occupancy varied from 43% in England to 31% in Wales and Northern Ireland while room occupancy varied from 62% in England to 44% in Northern Ireland.
- When compared with March 2010, occupancy levels rose in England (by 7 percentage points for bedspace occupancy and by 12 for room occupancy). In Wales, room occupancy rose by 1 percentage point with room occupancy falling by a similar amount. In Scotland room occupancy remained unchanged while bedspace occupancy fell by 2 percentage points and in Northern Ireland bedspace occupancy remained unchanged with room occupancy falling by 2 percentage points.
- When compared with four years earlier, occupancy levels in England had risen (by 1 percentage point for bedspace occupancy and by 5 for room occupancy) but had fallen in Scotland, Wales and Northern Ireland with the greatest falls (of 6 percentage points for bedspace occupancy and 10 for room occupancy) being in Northern Ireland.
- Bedspace occupancy by non-UK residents increased slightly 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)).

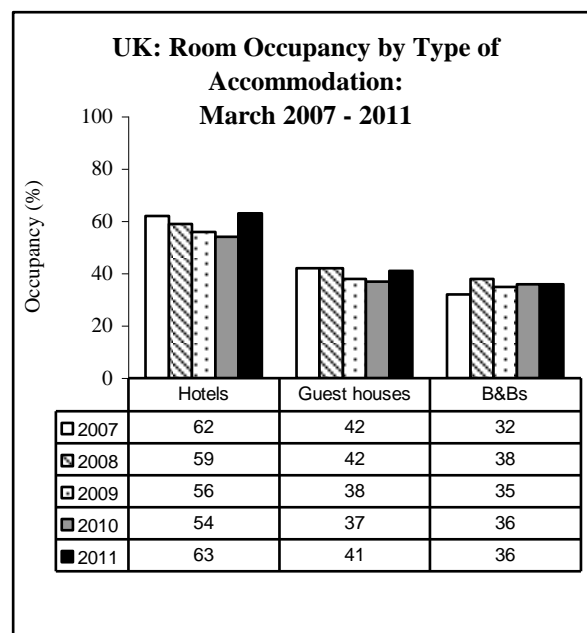
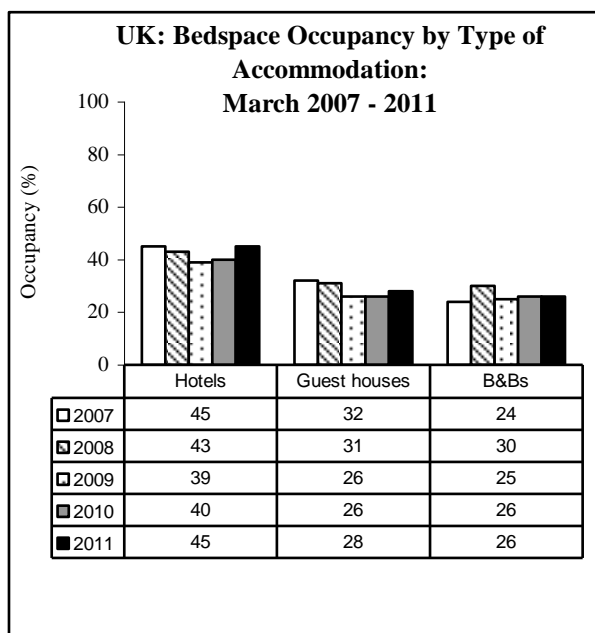
Table 1: Occupancy Levels: March 2009 – 2011

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	36	36	43	51	50	62	1242	1107	1641
Northern Ireland	32	31	31	47	46	44	190	145	197
Scotland	37	36	34	52	50	50	345	362	357
Wales	30	32	31	43	45	46	187	188	150
UK	36	36	41	51	50	59	1964	1802	2345

Table 2: UK/Non-UK Occupancy Levels: March 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	29	30	30	3	4	5	7	9	11	9	11	15	1242	1107	1641
Northern Ireland	21	20	19	11	11	12	34	28	30	33	35	38	190	145	197
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	345	362	357
Wales	25	26	27	1	1	2	**	**	**	5	5	7	187	188	150
UK	29	30	30	3	4	5	8	9	11	9	11	15	1964	1802	2345

** figures not available



- Occupancy levels in hotels and guest houses had risen when compared with March 2010 with the greatest rises (of 5 percentage points for bedspace occupancy and 9 for room occupancy) being in hotels. In bed and breakfast establishments both measures of occupancy had remained at their March 2010 figure (see Table 3).
- When compared with March 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 rises (of 9 percentage points for bedspace occupancy and 20 for room occupancy) being in the largest establishments. In establishments with 1-3 letting bedrooms occupancy levels remained as in March 2010 as did room occupancy in establishments with 51-100 letting bedrooms although bedspace occupancy in this size category fell by 4 percentage points. Establishments with 4-10 letting bedrooms experienced a slight rise in room occupancy with a similar fall in bedspace occupancy while establishments with 26-50 letting bedrooms saw a 1 percentage point fall in both measures of occupancy (see Table 5).
- When compared with March 2010, occupancy levels again rose in all locations with the greatest rises (of 5 percentage points for bedspace occupancy and 14 for room occupancy) being in establishments in city/large town locations and small towns (see Table 6).
- With a rise of 5 percentage points for bedspace occupancy and 13 for room occupancy, the over £60.00 tariff band was the only one to show a rise in occupancy levels when compared with March 2010. Establishments in the £30.00-£39.99 and £50.00-£59.99 tariff bands both showed an increase in room occupancy with bedspace occupancy remaining unchanged in the former but falling by 3 percentage points in the latter. The £20.00-£29.99 and £40.00-£49.99 tariff bands both saw occupancy rates falling (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	39	40	46	56	54	65	363	343	983
Northern Ireland	37	36	38	55	53	53	73	67	71
Scotland	41	41	40	57	57	58	214	234	244
Wales	36	38	38	51	54	55	97	102	83
UK	39	40	45	56	54	63	747	746	1381
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	27	28	30	39	40	44	301	296	262
Northern Ireland	20	14	16	28	19	23	23	18	23
Scotland	26	21	24	37	29	33	61	62	55
Wales	21	20	16	28	28	21	39	36	25
UK	26	26	28	38	37	41	424	412	365
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	27	28	29	37	38	40	576	466	396
Northern Ireland	13	17	12	17	25	18	94	59	103
Scotland	21	18	16	30	26	23	70	66	58
Wales	17	21	14	24	27	18	51	50	42
UK	25	26	26	35	36	36	791	641	599

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: March 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	33	33	45	40	41	41	55	51	56	48	48	64	9	10	9	6	8	13	10	12	13	8	11	16
Northern Ireland	38	38	35	28	27	25	48	47	43	46	45	41	35	25	32	36	31	34	35	34	40	35	36	43
Scotland	41	40	38	35	34	32	49	48	47	54	51	51	**	**	**	**	**	**	**	**	**	**	**	**
Wales	33	36	37	27	28	28	42	44	47	44	45	46	**	**	**	**	**	**	4	5	6	5	6	8
UK	34	34	43	38	39	39	53	50	54	48	48	61	10	10	10	7	9	13	10	12	13	8	11	16

** figures not available

Table 5: Occupancy Levels by Size: March 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	22	22	23	266	27	29	27	379	35	35	36	139	38	42	41	94	48	48	44	59	36	36	49	704
Northern Ireland	6	12	6	89	23	15	17	31	28	26	22	30	29	27	30	13	34	36	34	21	49	44	46	13
Scotland	18	15	14	52	29	23	27	80	33	29	29	62	39	41	40	60	52	52	48	49	47	49	46	54
Wales	14	17	15	35	24	24	22	45	32	31	33	27	36	37	35	23	35	42	41	15	44	53	42	5
UK	21	21	21	442	27	28	27	535	34	34	35	258	38	41	40	190	47	48	44	144	38	39	48	776

B: Percentage Bedroom Occupancy

England	30	31	31	266	37	38	39	379	48	48	49	139	52	59	58	94	62	65	65	59	58	47	72	704
Northern Ireland	9	19	11	89	29	20	23	31	41	39	36	30	42	41	43	13	52	53	50	21	72	62	61	13
Scotland	26	23	20	52	41	33	37	80	46	39	44	62	54	54	55	60	68	71	64	49	66	68	68	54
Wales	19	21	19	35	32	33	27	45	44	42	45	27	52	53	48	23	53	60	64	15	66	70	67	5
UK	28	29	29	442	37	37	38	535	47	46	48	258	52	58	57	190	62	65	65	144	60	51	71	776

Table 6: Occupancy Levels by Location: March 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	30	34	244	43	44	51	589	34	37	38	367	30	31	34	441
Northern Ireland	26	28	25	41	37	34	37	67	29	31	20	56	23	25	12	33
Scotland	36	32	33	48	45	44	44	132	32	30	27	76	30	30	24	101
Wales	33	34	36	41	41	44	38	16	27	28	31	17	26	28	25	76
UK	31	30	34	374	43	44	49	804	33	35	36	516	30	31	32	651

B: Percentage Bedroom Occupancy

England	40	43	44	244	62	64	71	589	51	39	58	367	42	44	51	441
Northern Ireland	35	36	33	41	57	52	54	67	43	41	28	56	31	35	19	33
Scotland	46	42	45	48	63	61	65	132	49	43	40	76	40	40	34	101
Wales	43	44	47	41	64	63	64	16	42	44	46	17	35	38	33	76
UK	41	43	44	374	62	63	70	804	50	40	54	516	41	43	47	651

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): March 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	12	-	-	-	16	16	13	58	27	21	23	219	34	31	27	189	28	39	34	95	39	39	45	1005
Northern Ireland	-	-	-	-	13	15	10	43	18	11	11	51	24	23	23	34	41	27	29	11	38	38	39	56
Scotland	-	-	-	-	30	27	18	39	31	29	23	63	37	33	27	34	38	34	39	41	41	39	41	179
Wales	-	-	-	-	17	17	16	15	17	24	17	47	30	25	33	19	42	39	43	13	38	39	36	56
UK	12	-	-	-	18	17	14	155	27	22	22	380	34	31	27	276	30	38	35	160	39	39	44	1296

B: Percentage Bedroom Occupancy

England	16	-	-	-	23	24	22	58	36	30	33	219	47	41	35	189	41	52	53	95	54	50	65	1005
Northern Ireland	-	-	-	-	16	22	15	43	27	16	17	51	36	38	38	34	56	37	37	11	57	55	54	56
Scotland	-	-	-	-	41	41	25	39	47	42	38	63	53	44	37	34	51	46	53	41	56	54	60	179
Wales	-	-	-	-	26	24	22	15	24	31	22	47	43	39	46	19	58	49	50	13	54	57	55	56
UK	16	-	-	-	25	26	22	155	36	31	33	380	47	41	36	276	44	51	53	160	54	51	64	1296

- 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)