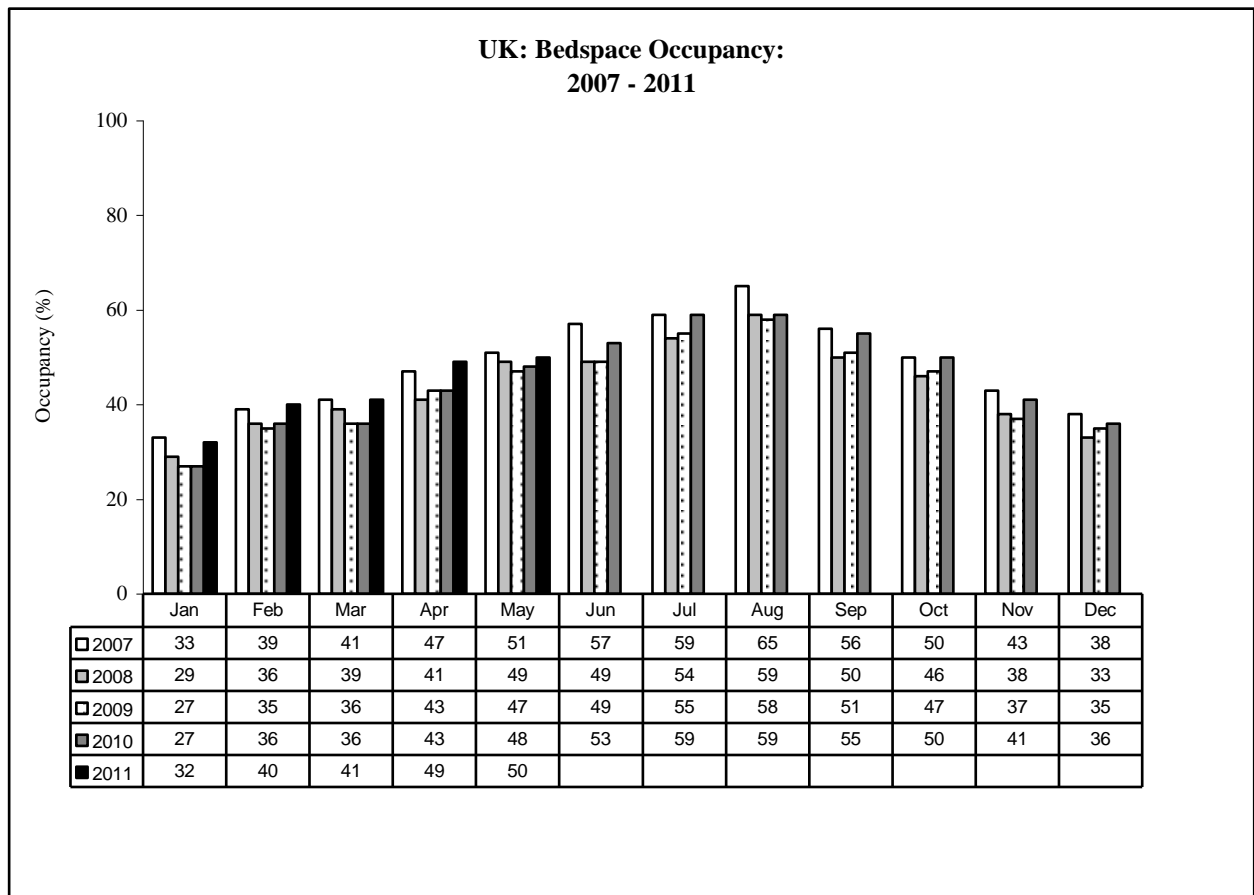


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

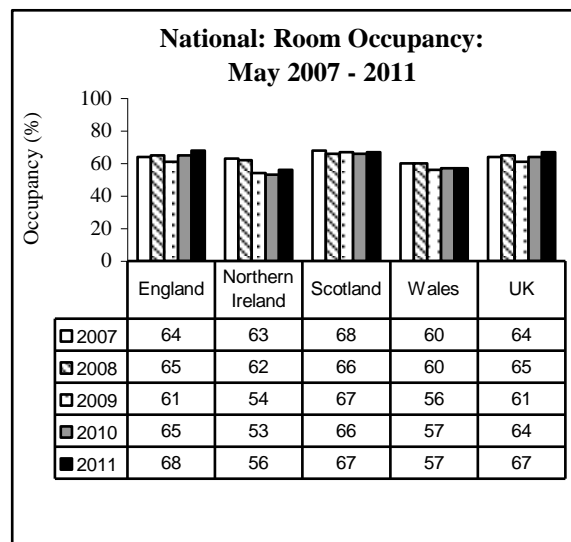
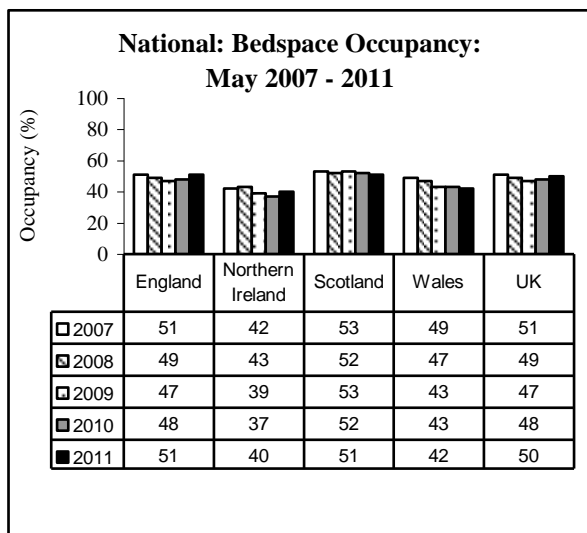
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

MAY 2011



- 2380 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 May 2011 was 50%, two percentage points higher than in May 2010. At 67%, room occupancy was three percentage points higher than in May 2010.



- Bedspace occupancy varied from 51% in England and Scotland to 40% in Northern Ireland while room occupancy varied from 68% in England to 56% in Northern Ireland.
- When compared with May 2010, occupancy levels rose by 3 percentage points in England and Northern Ireland. In Scotland and Wales, bedspace occupancy fell by 1 percentage point while room occupancy rose by 1 percentage point in Scotland and remained at its May 2010 level in Wales.
- When compared with four years earlier, occupancy levels had fallen in Scotland, Wales and Northern Ireland. In England, room occupancy had risen with bedspace occupancy remaining as in May 2007.
- Bedspace occupancy by non-UK residents increased in Northern Ireland (by 7 percentage points), remained unchanged in Wales and fell (by 1 percentage point) in England (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

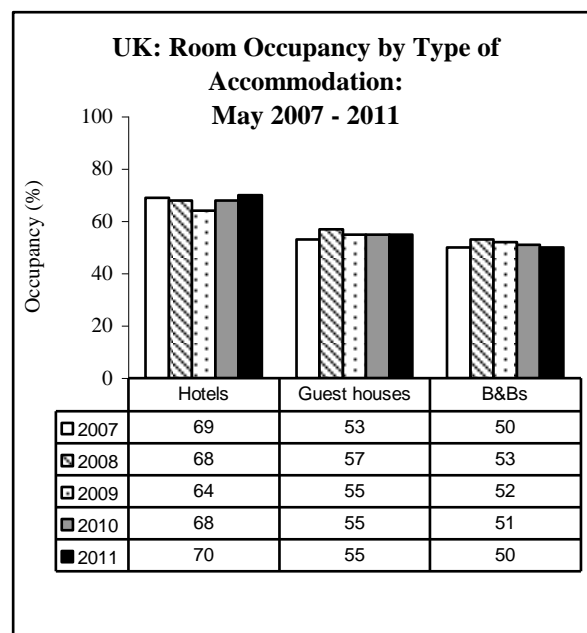
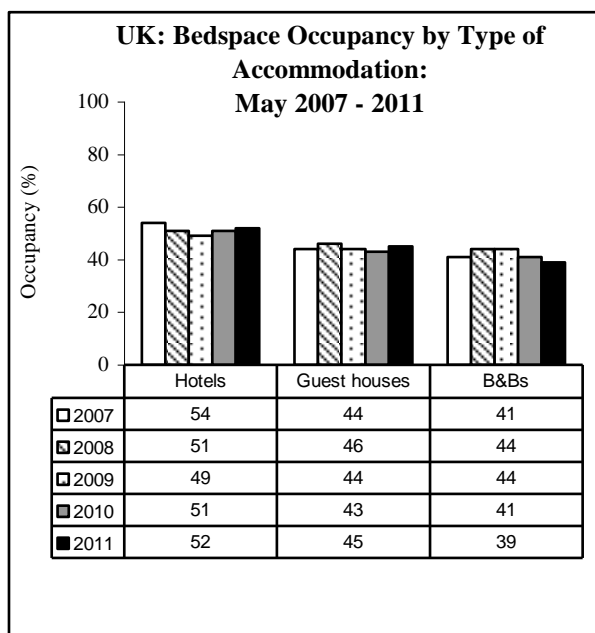
Table 1: Occupancy Levels: May 2009 – 2011

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	47	48	51	61	65	68	1318	1102	1719
Northern Ireland	39	37	40	54	53	56	187	143	131
Scotland	53	52	51	67	66	67	374	392	373
Wales	43	43	42	56	57	57	224	196	157
UK	47	48	50	61	64	67	2103	1833	2380

Table 2: UK/Non-UK Occupancy Levels: May 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	40	41	40	6	6	5	9	11	10	13	13	11	1318	1102	1719
Northern Ireland	27	24	20	12	13	20	32	33	46	31	35	50	187	143	131
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	374	392	373
Wales	39	37	36	3	3	3	**	**	**	7	8	8	224	196	157
UK	40	40	39	6	6	5	9	11	11	13	13	12	2103	1833	2380

** figures not available



- Occupancy levels in hotels had risen when compared with May 2010. In guest houses, bedspace occupancy had risen with room occupancy remaining unchanged while in bed and breakfast establishments both measures of occupancy had fallen (see Table 3).
- When compared with May 2010, only the largest establishments (those with more than 100 letting bedrooms) recorded an increase in both measures of occupancy. Bedspace occupancy fell in each of the remaining five size categories (by up to 8 percentage points (establishments with 51-100 letting bedrooms)) while room occupancy rose in establishments with 26-50 letting bedrooms, remained unchanged in those with 4-10 and 11-25 letting bedrooms and fell in those with 1-3 and 51-100 letting bedrooms (see Table 5).
- When compared with May 2010, occupancy levels rose in city/large town and country/village locations. In seaside locations bedspace occupancy rose but room occupancy fell slightly while in small town locations room occupancy remained unchanged but bedspace occupancy fell (by 3 percentage points) (see Table 6).
- Only establishments in the £50.00-£59.99 tariff band experienced a rise in both measures of occupancy when compared with May 2011. Those establishments with a maximum charge of more than £60.00 saw a rise in room occupancy but a slight fall in bedspace occupancy. Room occupancy remained at its May 2010 level in establishments in the £40.00-£49.99 tariff band with bedspace occupancy falling slightly while in the remaining 2 tariff bands (those with a maximum charge of £20.00-£29.99 or £30.00-£39.99) both room and bedspace occupancy fell (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	49	51	52	64	68	71	404	351	1035
Northern Ireland	43	41	43	61	61	62	66	66	65
Scotland	54	55	54	69	70	71	222	243	236
Wales	46	48	46	62	64	64	103	102	83
UK	49	51	52	64	68	70	795	762	1419
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	43	44	46	54	56	56	326	294	273
Northern Ireland	30	25	26	36	33	35	22	19	11
Scotland	52	45	49	63	57	60	65	65	63
Wales	42	36	34	52	45	44	46	38	29
UK	44	43	45	55	55	55	459	416	376
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	44	41	40	52	52	51	586	457	411
Northern Ireland	27	24	29	33	30	37	99	58	35
Scotland	50	46	42	57	54	51	87	84	74
Wales	33	33	30	39	40	37	75	56	45
UK	44	41	39	52	51	50	847	655	565

	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	42	43	53	53	55	47	60	64	66	62	65	70	12	14	8	8	9	11	14	15	11	12	11	12
Northern Ireland	47	44	46	31	30	34	56	59	59	48	51	53	33	31	46	38	37	53	32	33	50	35	38	57
Scotland	59	58	56	48	48	48	67	68	66	65	65	67	**	**	**	**	**	**	**	**	**	**	**	**
Wales	50	51	48	37	36	37	59	60	59	53	54	56	**	**	**	**	**	**	6	7	7	8	9	9
UK	45	46	53	51	52	46	61	64	65	62	64	68	12	14	9	9	10	12	14	15	12	12	11	13

** figures not available

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	39	37	37	282	44	43	41	386	45	45	44	133	49	51	48	93	57	59	50	53	46	49	54	772
Northern Ireland	19	21	19	73	34	25	39	19	36	32	29	24	37	35	38	12	42	42	40	21	49	47	49	12
Scotland	45	42	38	65	50	45	51	88	51	49	50	65	53	56	53	60	60	60	58	45	57	59	55	50
Wales	29	28	29	35	41	39	36	47	46	44	41	29	48	46	45	22	45	51	44	15	50	59	51	9
UK	39	37	36	455	44	43	42	540	46	45	44	251	49	51	48	187	56	58	50	134	48	51	54	843
B: Percentage Bedroom Occupancy																								
England	47	46	46	282	54	54	52	386	56	58	57	133	62	64	66	93	68	72	71	53	68	72	77	772
Northern Ireland	23	27	28	73	39	31	44	19	51	48	45	24	51	52	53	12	63	57	61	21	67	71	67	12
Scotland	54	51	47	65	61	55	62	88	62	62	64	65	67	71	67	60	76	78	76	45	73	78	77	50
Wales	33	34	35	35	51	49	46	47	61	58	55	29	63	60	60	22	65	69	67	15	69	74	73	9
UK	47	46	45	455	54	53	53	540	57	58	58	251	63	64	66	187	69	72	71	134	69	73	77	843

Table 6: Occupancy Levels by Location: May 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	45	44	49	248	51	52	54	611	46	47	44	367	45	47	48	442
Northern Ireland	39	39	39	34	41	38	43	55	36	35	31	47	38	33	32	25
Scotland	59	54	52	54	56	56	53	126	47	48	45	77	50	49	51	116
Wales	49	50	45	41	42	46	43	18	43	46	39	22	41	37	39	76
UK	47	46	49	377	51	52	53	810	46	47	44	513	45	46	48	659

B: Percentage Bedroom Occupancy

England	56	57	56	248	69	72	75	611	59	62	63	367	53	57	62	442
Northern Ireland	51	52	51	34	58	58	63	55	52	51	41	47	46	43	40	25
Scotland	68	65	66	54	72	74	74	126	62	62	59	77	60	58	61	116
Wales	62	65	59	41	61	63	65	18	61	65	62	22	50	46	48	76
UK	58	58	57	377	69	71	74	810	59	62	62	513	54	56	61	659

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): May 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	26	-	-	-	29	29	25	59	41	35	31	235	47	48	47	187	50	43	49	96	50	52	51	1079
Northern Ireland	-	-	-	-	25	25	30	32	31	22	25	45	32	26	31	26	40	38	46	12	45	43	44	46
Scotland	-	-	-	-	52	44	32	37	52	46	47	82	54	53	50	36	55	51	57	41	55	55	55	177
Wales	-	-	-	-	27	24	24	18	38	36	33	45	40	40	41	26	45	44	51	12	49	52	46	56
UK	25	-	-	-	32	31	26	146	42	36	33	407	47	48	47	275	50	44	50	161	51	52	51	1358

B: Percentage Bedroom Occupancy

England	36	-	-	-	37	37	35	59	50	47	41	235	57	57	56	187	61	53	61	96	63	67	72	1079
Northern Ireland	-	-	-	-	28	30	39	32	39	29	32	45	46	41	52	26	54	48	58	12	64	63	63	46
Scotland	-	-	-	-	70	55	41	37	68	65	59	82	64	64	63	36	65	63	70	41	69	71	72	177
Wales	-	-	-	-	31	29	29	18	47	47	44	45	53	53	55	26	59	57	61	12	64	67	65	56
UK	34	-	-	-	41	39	35	146	52	49	43	407	57	57	57	275	61	54	62	161	64	67	71	1358

- 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)