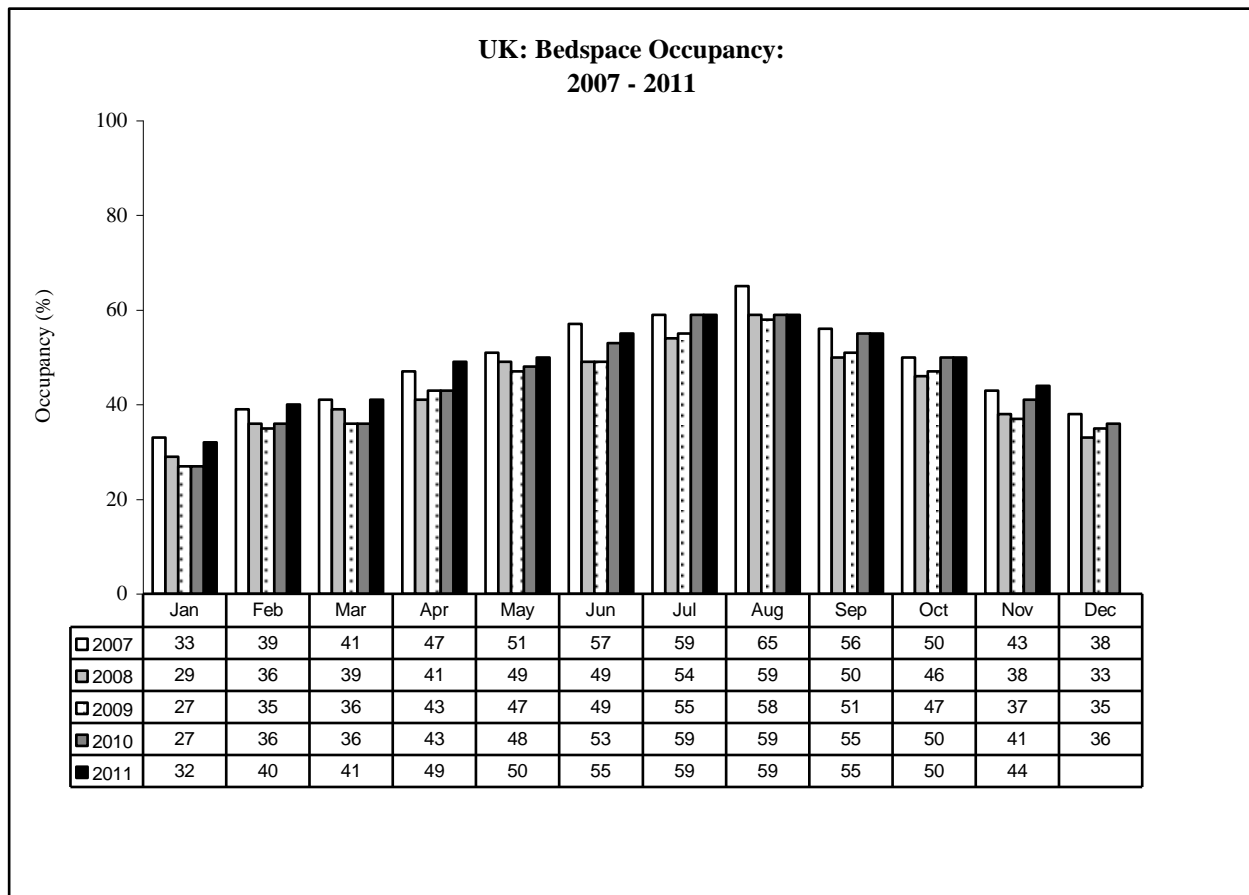


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

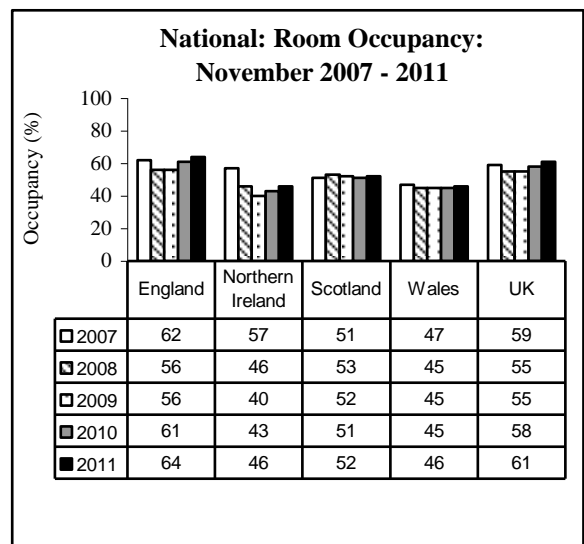
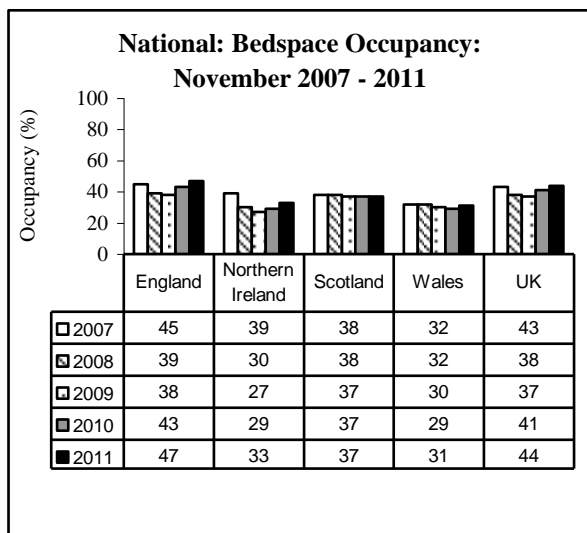
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

NOVEMBER 2011



- 2225 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 November 2011 was 44%, 3 percentage points higher than in November 2010. At 61%, room occupancy was also the 3 percentage points higher than in November 2010.



- Bedspace occupancy varied from 47% in England to 31% in Wales while room occupancy varied from 64% in England to 46% in Wales and Northern Ireland.
- When compared with November 2010, both measures of occupancy rose in England, Wales and Northern Ireland with the greatest increase (of 4 percentage points) being in bedspace occupancy in England and Northern Ireland. In Scotland, room occupancy rose slightly while bedspace occupancy remained unchanged.
- When compared with four years earlier, both room and bedspace occupancy had risen in England by 2 percentage points. In Scotland, room occupancy had risen by 1 percentage point with bedspace occupancy falling by a similar amount. In Wales and Northern Ireland, occupancy levels had fallen (by 1 percentage point for both room and bedspace occupancy in Wales and by 11 and 6 percentage points respectively in Northern Ireland).
- Bedspace occupancy by non-UK residents increased in England and Northern Ireland (by 1 and 5 percentage points respectively) when compared with November 2010, and had remained unchanged in Wales (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

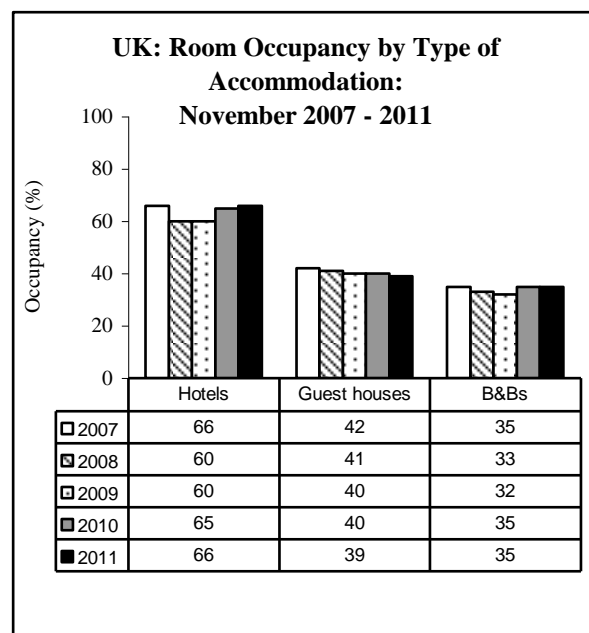
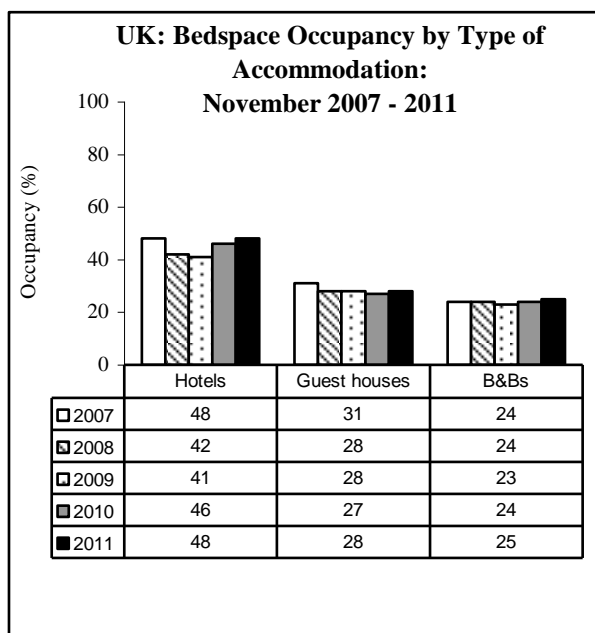
Table 1: Occupancy Levels: November 2009 – 2011

	Bedspace occupancy %			Room occupancy %			Sample size		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	38	43	47	56	61	64	1114	1516	1640
Northern Ireland	27	29	33	40	43	46	141	159	156
Scotland	37	37	37	52	51	52	326	341	300
Wales	30	29	31	45	45	46	179	163	129
UK	37	41	44	55	58	61	1760	2179	2225

Table 2: UK/Non-UK Occupancy Levels: November 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	28	27	35	5	5	6	13	8	12	15	15	15	1114	1516	1640
Northern Ireland	18	18	17	9	11	16	29	33	46	33	38	48	141	159	156
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	326	341	300
Wales	25	23	25	1	2	2	**	**	**	5	7	6	179	163	129
UK	28	27	34	5	5	6	13	9	13	15	15	15	1760	2179	2225

** figures not available



- Occupancy levels in hotels had risen (by 2 percentage points for bedspace occupancy and by 1 for room occupancy) when compared with November 2010. In bed and breakfast establishments, room occupancy was as in November 2010 with bedspace occupancy rising by 1 percentage point while in guest houses bedspace occupancy had risen by 1 percentage point but room occupancy had fallen by the same amount (see Table 3).
- Two size categories (those with 11-25 and 51-100 letting bedrooms) saw a rise in occupancy levels when compared with November 2010, while in three size categories (establishments with 1-4, 5-10 and more than 100 letting bedrooms) occupancy levels remained unchanged. Establishments with 26-50 letting bedrooms experienced a 3 percentage point rise in bedspace occupancy accompanied by a 1 percentage point fall in room occupancy (see Table 5).
- When compared with November 2010, occupancy levels rose in both country/village and seaside locations (by 6 percentage points for bedspace occupancy and by 8 for room occupancy in the former and by 3 percentage points for each measure in the latter). In small town locations bedspace occupancy rose (by 3 percentage points) but room occupancy fell (by 1 percentage point) while in city/large town locations both room and bedspace occupancy fell (see Table 6).
- Establishments in four tariff bands (those with a maximum charge of £20.00-£29.99, £40.00-£49.99, £50.00-£59.99 and more than £60.00) experienced rises in both room and bedspace occupancy when compared with November 2010. Establishments in the remaining tariff band (£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: November 2009 – 2011

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	42	48	50	61	67	68	373	907	1041
Northern Ireland	33	34	39	49	50	54	69	78	67
Scotland	42	43	42	59	58	60	224	230	215
Wales	36	36	38	54	54	57	93	92	71
UK	41	46	48	60	65	66	759	1307	1394
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	29	29	31	42	42	43	271	244	234
Northern Ireland	15	10	17	19	16	24	18	17	12
Scotland	23	23	20	34	35	28	51	48	37
Wales	22	16	12	31	24	17	36	31	23
UK	28	27	28	40	40	39	376	340	306
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	25	25	27	34	37	39	466	365	365
Northern Ireland	8	15	12	12	22	18	54	64	77
Scotland	19	17	15	25	25	21	51	63	48
Wales	14	20	16	19	27	20	50	40	35
UK	23	24	25	32	35	35	621	532	525

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: November 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	35	47	51	42	41	44	58	57	60	53	64	66	15	6	10	11	10	14	16	12	13	14	17	16
Northern Ireland	33	33	38	23	23	26	43	43	53	38	41	44	33	34	47	33	39	46	41	42	52	37	40	53
Scotland	41	43	40	35	34	33	50	51	48	54	52	52	**	**	**	**	**	**	**	**	**	**	**	**
Wales	34	34	35	27	26	28	43	45	45	45	44	47	**	**	**	**	**	**	3	5	4	7	9	7
UK	36	45	48	40	39	41	56	55	57	52	61	63	15	7	11	11	11	15	16	12	13	14	17	16

** figures not available

Table 5: Occupancy Levels by Size: November 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	20	20	21	250	28	26	27	340	34	35	37	133	41	39	44	95	50	50	54	54	42	52	52	768
Northern Ireland	5	8	9	68	15	21	13	17	23	23	23	21	24	27	24	15	31	28	36	22	41	47	47	13
Scotland	32	13	13	44	29	32	22	54	35	35	36	50	39	40	37	55	52	53	49	46	51	50	49	51
Wales	13	16	13	28	21	22	20	40	34	31	36	23	36	33	36	18	40	46	41	12	44	43	38	8
UK	21	19	19	390	27	26	26	451	34	35	37	227	40	39	42	183	49	50	52	134	43	51	51	840

B: Percentage Bedroom Occupancy

England	28	29	30	250	37	36	38	340	48	51	52	133	57	58	56	95	66	65	69	54	67	75	76	768
Northern Ireland	7	13	15	68	21	26	18	17	35	37	38	21	38	40	47	15	47	50	57	22	59	60	55	13
Scotland	37	20	18	44	40	42	31	54	47	47	48	50	53	54	53	55	68	69	68	46	74	73	72	51
Wales	18	22	16	28	29	31	25	40	49	47	49	23	52	50	66	18	60	62	51	12	67	64	62	8
UK	28	27	27	390	37	36	36	451	48	50	51	227	56	57	56	183	66	65	68	134	68	74	74	840

Table 6: Occupancy Levels by Location: November 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	31	33	37	217	47	55	54	625	35	36	40	361	29	30	39	437
Northern Ireland	17	21	23	31	34	35	40	55	25	27	22	46	21	17	11	24
Scotland	31	31	33	37	46	46	44	116	35	30	28	65	30	32	28	82
Wales	35	35	38	32	45	36	36	16	26	29	31	16	24	24	24	65
UK	31	33	36	317	47	52	51	812	34	35	38	488	29	30	36	608

B: Percentage Bedroom Occupancy

England	45	46	49	217	69	74	72	625	51	56	56	361	41	42	53	437
Northern Ireland	29	27	33	31	49	52	54	55	37	43	33	46	29	21	17	24
Scotland	40	40	40	37	65	65	66	116	51	43	42	65	40	42	36	82
Wales	47	49	52	32	68	61	60	16	40	48	48	16	34	34	31	65
UK	44	45	48	317	68	72	70	812	50	54	53	488	40	41	49	608

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): November 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	-	-	-	-	17	15	19	43	22	23	22	185	28	26	29	173	37	34	37	87	42	47	49	1063
Northern Ireland	-	-	-	-	7	16	14	30	10	7	11	35	21	25	26	24	28	28	29	17	35	36	40	50
Scotland	-	-	-	-	22	21	14	24	30	32	21	56	35	32	28	32	37	42	38	40	43	41	45	148
Wales	-	-	-	-	13	19	11	10	17	19	19	38	31	22	26	19	33	40	50	13	38	36	35	48
UK	-	-	-	-	17	16	18	107	22	24	22	314	29	26	29	248	37	35	38	157	42	45	47	1309

B: Percentage Bedroom Occupancy

England	-	-	-	-	26	27	33	43	32	33	34	185	40	35	37	173	49	48	50	87	58	67	68	1063
Northern Ireland	-	-	-	-	10	19	23	30	17	12	17	35	32	40	39	24	42	37	45	17	52	52	54	50
Scotland	-	-	-	-	35	32	19	24	45	45	34	56	46	44	44	32	50	55	51	40	58	55	61	148
Wales	-	-	-	-	18	21	15	10	24	30	25	38	43	34	33	19	45	52	60	13	57	55	56	48
UK	-	-	-	-	26	27	30	107	33	34	33	314	41	36	38	248	49	49	51	157	58	65	66	1309

- 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)