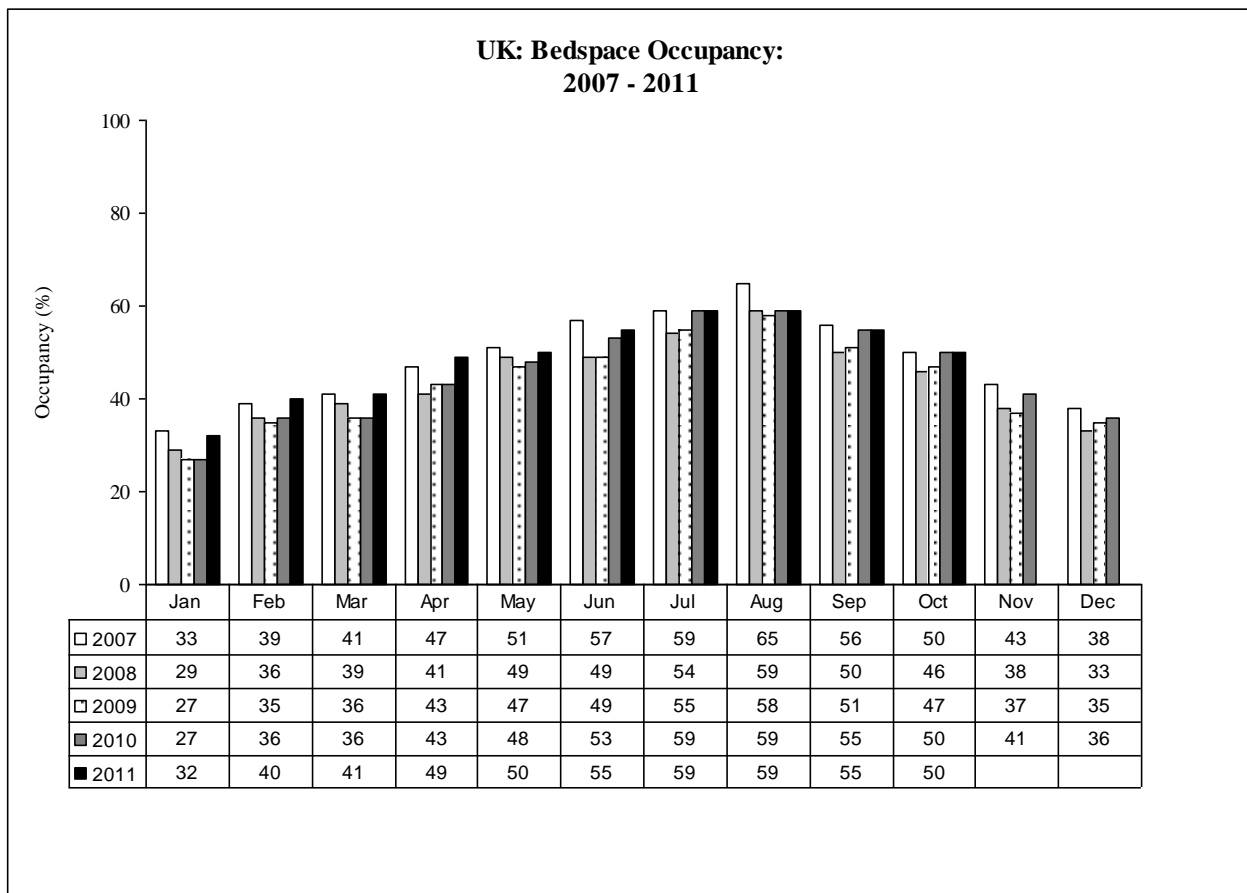


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

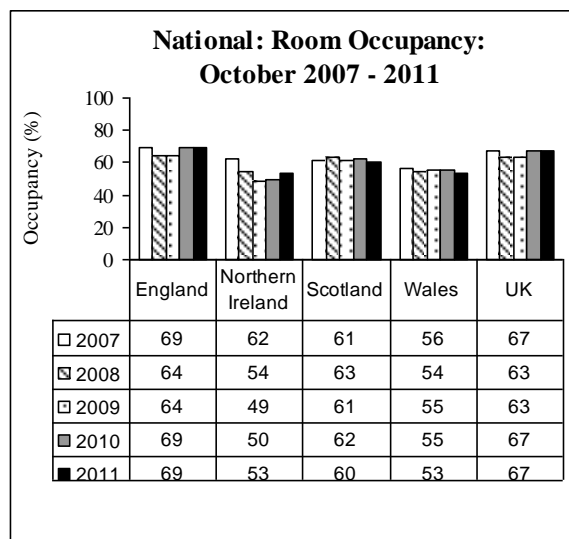
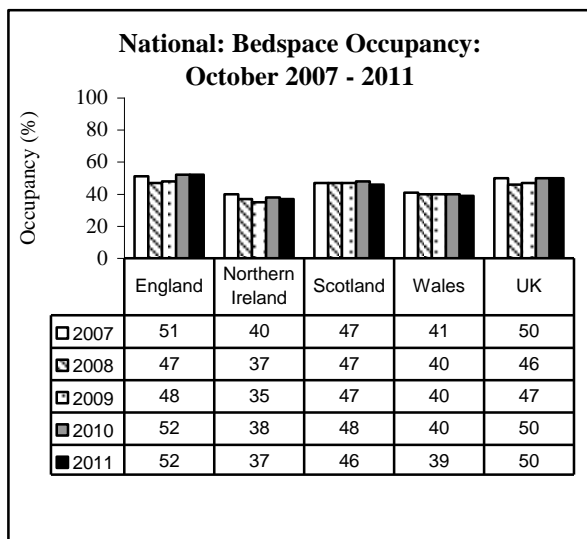
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

OCTOBER 2011



- 2349 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 October 2011 was 50%, the same as in October 2010. At 67%, room occupancy was also the same as in October 2010.



- Bedspace occupancy varied from 52% in England to 37% in Northern Ireland while room occupancy varied from 69% in England to 53% in Wales and Northern Ireland.
- When compared with October 2010, room occupancy rose in Northern Ireland, remained unchanged in England but fell in Scotland and Wales. Bedspace occupancy remained unchanged in England but fell in Scotland, Wales and Northern Ireland (by 2, 1 and 1 percentage points respectively).
- When compared with four years earlier, bedspace occupancy had risen in England (by 1 percentage point) with room occupancy unchanged. In Scotland, Wales and Northern Ireland, occupancy levels had fallen with the greatest fall (of 9 percentage points) being in room occupancy in Northern Ireland.
- Bedspace occupancy by non-UK residents increased in Northern Ireland (by 7 percentage points) when compared with October 2010, remained unchanged in England but fell slightly in Wales (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

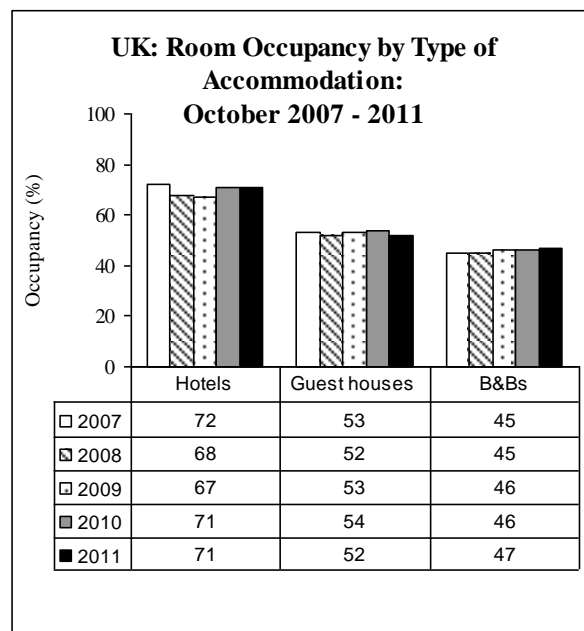
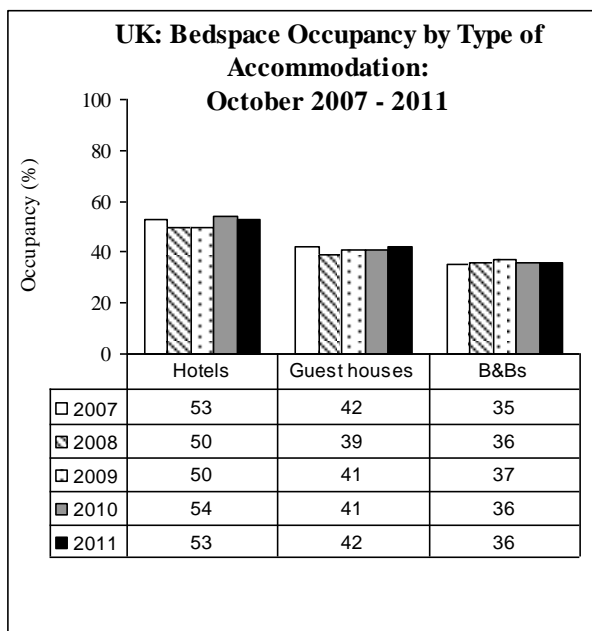
Table 1: Occupancy Levels: October 2009 – 2011

	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	48	52	52	64	69	69	1208	1647	1715
Northern Ireland	35	38	37	49	50	53	167	165	152
Scotland	47	48	46	61	62	60	357	358	332
Wales	40	40	39	55	55	53	208	194	150
UK	47	50	50	63	67	67	1940	2364	2349

Table 2: UK/Non-UK Occupancy Levels: October 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			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	40	42	39	4	6	6	7	9	11	9	12	13	1208	1647	1715
Northern Ireland	22	24	17	14	13	20	35	33	32	38	35	55	167	165	152
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	357	358	332
Wales	35	34	35	2	3	2	**	**	**	6	7	5	208	194	150
UK	39	41	38	4	6	6	8	10	11	9	12	13	1940	2364	2349

** figures not available



- Room occupancy levels in bed and breakfast establishments had risen (by 1 percentage point) when compared with October 2010 with bedspace occupancy remaining unchanged. In hotels, room occupancy was as in October 2010 while bedspace occupancy had fallen by 1 percentage point and in guest houses bedspace occupancy had risen by 1 percentage point but room occupancy had fallen by 2 percentage points (see Table 3).
- Except for those establishments with 11-25 letting bedrooms (where occupancy levels were the same as in October 2010), all size categories saw a fall in occupancy levels, with the greatest falls being in those establishments with 26-50 and 51-100 letting bedrooms (where bedspace occupancy fell by 4 percentage points and room occupancy by 3 in the latter and room occupancy by 3 percentage points in the former) (see Table 5).
- When compared with October 2010, occupancy levels rose slightly country/village locations. In seaside locations bedspace occupancy remaining unchanged with room occupancy falling slightly while in urban locations (city/large towns and small towns) both measures of occupancy had fallen (see Table 6).
- Establishments in only one tariff band (those with a maximum charge of £40.00-£49.99) experienced a rise in both room and bedspace occupancy when compared with October 2010. Establishments in the £50.00-£59.00 tariff band saw a 2 percentage point rise in room occupancy with bedspace occupancy remaining as in 2010. Bedspace occupancy also remained unchanged in establishments in the £30.00-£39.99 tariff band where room occupancy fell by 1 percentage point. Both measures of occupancy fell in the remaining two tariff bands (£20.00-£29.99 and over £60.00) (see Table 7 and note 5a, page 7 (sample sizes)).

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

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	50	55	54	68	73	72	398	932	1052
Northern Ireland	42	43	42	58	57	61	69	75	63
Scotland	51	53	52	67	68	68	230	234	223
Wales	45	45	45	63	62	61	101	106	80
UK	50	54	53	67	71	71	798	1347	1418
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	43	43	45	55	56	56	296	277	256
Northern Ireland	21	25	19	27	30	29	21	21	12
Scotland	35	39	33	46	51	42	55	53	51
Wales	36	30	25	47	41	32	44	37	26
UK	41	41	42	53	54	52	416	388	345
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
England	40	38	39	49	49	50	510	438	407
Northern Ireland	19	20	22	25	24	29	77	69	77
Scotland	29	28	28	35	35	37	72	71	58
Wales	25	32	23	31	38	29	63	51	44
UK	37	36	36	46	46	47	722	629	586

	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	43	56	56	53	49	49	64	66	66	63	71	70	8	8	10	6	10	12	10	11	12	8	13	14
Northern Ireland	44	42	43	32	30	29	54	51	56	52	46	48	37	33	39	39	36	44	41	36	59	42	38	61
Scotland	50	50	48	44	47	44	58	59	58	62	65	63	**	**	**	**	**	**	**	**	**	**	**	**
Wales	45	46	44	35	35	36	55	56	53	54	54	54	**	**	**	**	**	**	5	6	4	6	8	7
UK	44	54	54	50	48	47	63	64	64	62	69	68	9	9	11	7	11	13	10	11	12	9	13	14

** 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	33	34	33	270	42	42	42	373	46	48	47	134	52	53	53	97	54	58	53	53	51	56	56	788
Northern Ireland	9	14	13	65	22	31	28	20	30	30	29	24	36	37	34	15	40	37	41	19	49	55	47	9
Scotland	25	24	24	52	39	45	37	71	42	46	50	52	50	52	46	57	59	59	55	47	59	59	56	53
Wales	22	27	22	35	35	35	33	48	42	41	41	25	44	44	42	19	49	51	44	13	52	55	48	10
UK	31	32	31	422	41	42	41	512	45	47	47	235	51	52	51	188	54	57	53	132	52	56	55	860
B: Percentage Bedroom Occupancy																								
England	41	43	41	270	52	52	53	373	58	61	60	134	68	69	66	97	71	72	69	53	72	79	78	788
Northern Ireland	14	17	22	65	29	36	33	20	44	43	42	24	49	51	53	15	58	55	61	19	66	65	66	9
Scotland	32	31	33	52	51	56	46	71	53	59	62	52	63	66	60	57	76	75	73	47	77	79	77	53
Wales	27	32	29	35	45	46	37	48	57	54	53	25	60	59	67	19	71	68	57	13	74	75	67	10
UK	39	40	39	422	51	52	51	512	57	60	60	235	67	68	65	188	71	72	69	132	73	79	77	860

Table 6: Occupancy Levels by Location: October 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	47	45	45	234	53	60	58	643	46	46	46	379	41	47	48	459
Northern Ireland	27	35	36	29	42	43	42	52	33	37	28	43	26	24	18	28
Scotland	46	48	48	50	52	54	52	120	43	44	37	70	43	43	40	92
Wales	45	46	45	38	51	48	42	19	38	36	34	21	34	36	36	72
UK	46	45	45	351	52	58	56	834	45	45	44	513	41	45	46	651

B: Percentage Bedroom Occupancy

England	58	56	54	234	73	79	76	643	62	65	65	379	54	59	61	459
Northern Ireland	42	46	46	29	56	57	62	52	46	48	37	43	35	30	30	28
Scotland	58	58	58	50	69	71	71	120	56	59	50	70	52	53	52	92
Wales	59	59	57	38	72	70	64	19	53	56	54	21	44	46	41	72
UK	58	56	55	351	72	77	74	834	60	63	62	513	53	57	58	651

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): October 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	-	-	-	-	33	33	34	55	37	38	39	212	46	39	40	187	47	49	49	87	52	54	54	1085
Northern Ireland	-	-	-	-	12	18	24	27	20	16	18	37	27	26	37	28	39	35	20	13	45	46	43	47
Scotland	-	-	-	-	40	34	22	33	39	40	33	67	48	47	38	32	48	49	51	39	52	55	54	161
Wales	-	-	-	-	21	26	18	13	29	30	26	47	41	34	44	19	43	49	49	15	48	47	43	56
UK	21	-	-	-	33	32	31	128	36	37	37	363	46	39	40	266	47	49	49	154	52	54	53	1349

B: Percentage Bedroom Occupancy

England	-	-	-	-	41	44	42	55	47	48	49	212	60	48	49	187	59	61	62	87	66	73	72	1085
Northern Ireland	-	-	-	-	16	20	32	27	26	20	27	37	40	39	52	28	53	43	36	13	61	60	61	47
Scotland	-	-	-	-	57	46	29	33	54	56	46	67	60	59	52	32	58	60	65	39	66	70	70	161
Wales	-	-	-	-	25	27	21	13	39	39	34	47	55	51	56	19	56	59	59	15	66	65	60	56
UK	27	-	-	-	42	43	39	128	47	48	47	363	59	49	50	266	59	60	62	154	66	72	71	1349

- 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)