



UK Occupancy Survey for Serviced Accommodation

Annual Summary 2011

JN:260102529



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This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2011 which is jointly commissioned by the four statutory tourism organisations of the UK.

The report was written by Sue Tait on behalf of TNS RI Travel and Tourism.

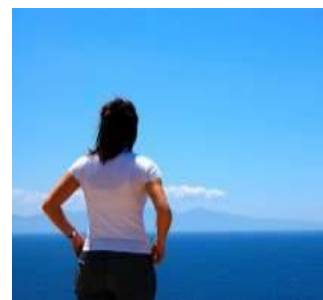
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1. Main Five Year Trends

1.1 Introduction

This report summarises the main trends apparent from the individual surveys carried out in England, Scotland, Wales and Northern Ireland during the period 2007 – 2012 which have been aggregated to provide occupancy figures for the UK as a whole. In addition to this summary, fuller separate reports for Scotland,



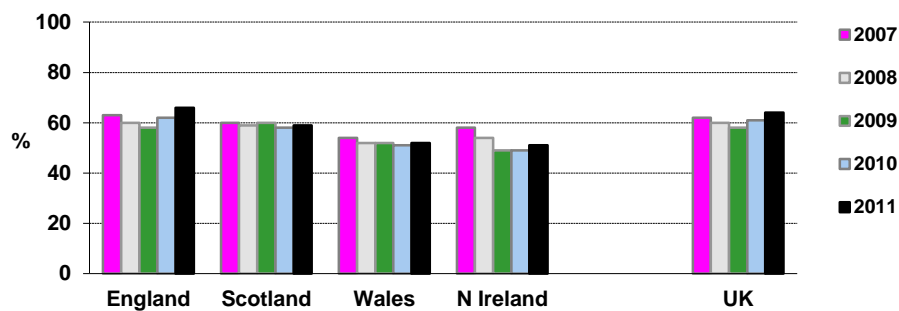
Wales and Northern Ireland are available (see page 14). Each of these national tourism organisations holds its own data from which this report was compiled, together with further details about occupancy according to the size and tariff of the establishments and (in some cases) average length of stay. It should be noted that, from June 2010, English occupancy data (provided by the Research Solution) includes occupancy information for the 100+ room hotel sector supplied by STR Global. Given this change in the structure of the sample from that date, care should be taken the interpretation of year-on-year changes.

Overall the UK-wide 2011 occupancy levels showed an improvement when compared with 2010 although figures again varied throughout the UK. In England, occupancy levels for the most part rose encouragingly. In the rest of the UK, bedroom occupancy rose slightly while bedspace occupancy remained at its 2010 level in Wales and Northern Ireland but fell slightly in Scotland.

1.2 Bedroom occupancy

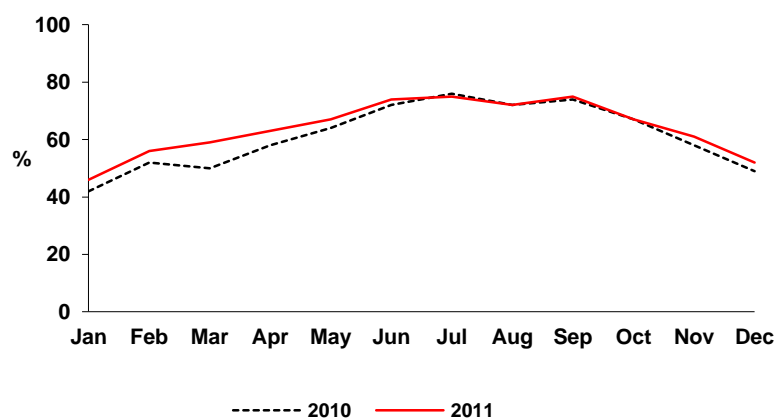
The 2011 UK annual average of 64% was three percentage points higher than in 2010. When compared with that year, the annual average bedroom occupancy increased throughout the UK – by 4 percentage points in England, by 2 in Northern Ireland and by 1 in Scotland and Wales.

Fig. 1.1: UK and National: Annual Bedroom Occupancy 2007 – 2011



2011 bedroom occupancy levels in England were 3 percentage points higher than in 2007 while those in Scotland, Wales and Northern Ireland were 1, 2 and 9 percentage points below the 2007 levels.

Fig. 1.2: UK: Monthly Bedroom Occupancy 2010 and 2011



When compared with 2010, UK monthly figures rose in every month except July (when the UK average was 1 percentage point lower than the previous year) and August and October (when the figures were the same as in 2010). The greatest rise (of 9 percentage points) was in March.

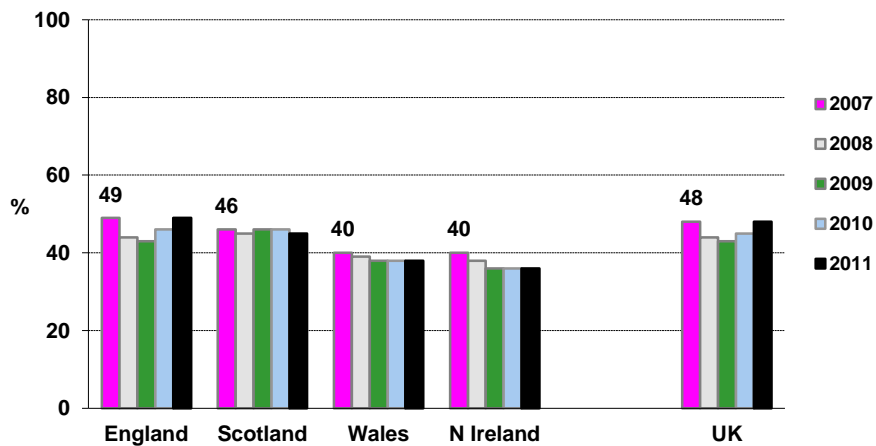
When compared with four years previously (2007), nine out of twelve months saw an increase in UK bedroom occupancy. Of the remaining three months in the year, the month of October was at the same level as 2007, whilst January and August saw a decrease (of 1 and 2 percentage points respectively). As in previous years there were differences between the four countries with the figures for England more or less reflecting those of the UK as a whole. In Scotland, only April, June, July and November recorded bedroom occupancy figures above those of 2007 although it must be remembered that weather conditions in early 2011 made travel extremely difficult. In Wales only, February and April showed an increase in bedroom occupancy when compared with 2007; for the rest of the year the figures were either the same as or lower than those of 2007. In Northern Ireland bedroom occupancy figures were consistently below those of 2007 (by between 2 and 11 percentage points).

	Bedroom Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	07	08	09	10	11	07	08	09	10	11	07	08	09	10	11	07	08	09	10	11	07	08	09	10	11
January	50	45	42	43	49	39	43	42	38	36	35	35	32	31	33	40	38	35	32	31	47	44	41	42	46
February	54	55	49	53	59	50	50	49	50	46	44	45	41	43	45	47	49	46	42	44	53	54	49	52	56
March	57	55	51	50	62	52	52	52	50	50	47	46	43	45	47	54	51	47	46	44	56	54	51	50	59
April	61	59	58	59	65	56	55	58	55	58	52	49	51	53	54	58	55	50	40	48	60	58	57	58	63
May	64	65	61	65	68	68	66	67	66	67	60	60	56	57	57	63	62	54	53	55	64	65	61	64	67
June	72	66	65	73	75	71	69	70	72	74	63	59	62	63	63	67	64	56	58	65	71	66	65	72	74
July	71	71	67	77	77	71	70	74	74	73	64	64	66	64	64	64	62	58	61	60	70	70	68	76	75
August	73	70	67	72	72	80	77	79	78	79	70	67	67	65	65	72	69	65	63	67	74	71	69	72	72
September	71	69	69	75	76	74	70	70	72	74	66	62	64	62	62	70	63	55	60	60	71	69	69	74	75
October	69	64	64	69	69	61	63	61	62	60	56	54	55	55	53	62	54	49	50	52	67	63	63	67	67
November	62	56	56	61	64	51	53	52	51	52	47	45	45	45	47	57	46	40	43	46	59	55	55	58	61
December	51	48	51	52	55	42	43	44	36	41	41	37	39	34	36	42	38	36	35	38	49	47	49	49	52
April–Oct Average	69	66	64	70	72	69	67	68	68	69	62	59	60	60	60	65	61	55	55	58	68	66	65	69	70
July–Sept Average	72	70	68	75	75	75	72	74	75	75	67	64	66	64	64	68	65	59	61	63	72	70	68	74	74
Annual Average	63	60	58	62	66	60	59	60	58	59	54	52	52	51	52	58	54	49	49	51	62	60	58	61	64

1.3 Bedspace occupancy

The difference between bedroom and bedspace occupancy is explained by single occupancy of double/twin rooms or, in some cases, empty beds in family rooms. A double room occupied by one person has 100 per cent room occupancy but only 50% bedspace occupancy.

Fig. 1.3: UK and National: Annual Bedspace Occupancy 2007 – 2011



As in 2010, patterns of bedspace occupancy were again broadly similar to those for bedroom occupancy with the 2011 UK monthly figures being higher than the 2010 figure for eight months and the same as the 2010 figure in July, August, September and October.

Annual average bedspace occupancy remained at its 2007 figure in England but fell in Scotland, Wales and Northern Ireland (by 1, 2 and 4 percentage points respectively).

	Bedspace Occupancy (%)																								
	England					Scotland					Wales					Northern Ireland					UK				
	07	08	09	10	11	07	08	09	10	11	07	08	09	10	11	07	08	09	10	11	07	08	09	10	11
January	35	29	27	28	34	26	29	29	27	25	21	21	21	20	21	26	25	24	20	21	33	29	27	27	32
February	40	37	35	36	42	36	36	35	36	33	31	30	28	30	30	30	33	33	30	31	39	36	35	36	40
March	42	39	36	36	43	37	39	37	36	34	33	34	30	32	32	37	37	32	31	30	41	39	36	36	41
April	49	42	43	44	50	43	40	46	43	46	40	35	38	40	40	41	36	36	33	37	47	41	43	43	49
May	51	49	47	48	51	53	52	53	52	51	47	47	43	43	42	42	43	39	37	39	51	49	47	48	50
June	58	49	49	53	56	57	53	55	56	58	49	44	45	47	46	46	44	40	43	44	57	49	49	53	55
July	60	54	54	59	60	57	57	62	61	61	51	50	51	51	48	46	45	46	49	42	59	54	55	59	59
August	65	59	57	58	59	69	65	67	66	65	59	55	55	53	52	54	54	53	50	52	65	59	58	59	59
September	56	50	51	56	56	58	53	54	56	57	51	48	48	47	45	47	44	38	43	42	56	50	51	55	55
October	51	47	48	52	52	47	47	47	48	46	41	40	40	40	39	40	37	35	28	36	50	46	47	50	50
November	45	39	38	43	47	38	38	37	37	37	32	32	30	29	31	39	30	27	29	33	43	38	37	41	44
December	40	34	36	39	42	33	32	33	28	31	29	27	28	23	25	29	26	26	26	28	38	33	35	36	39
April–Oct Average	56	50	50	53	55	55	53	55	55	55	48	46	46	46	45	45	43	41	42	42	55	50	50	53	54
July–Sept Average	60	54	54	58	58	62	59	61	61	61	54	51	51	50	48	49	48	46	47	45	60	55	55	58	58
Annual Average	49	44	43	46	49	46	45	46	46	45	40	39	38	38	38	40	38	36	36	36	48	44	43	45	48

1.4 Weekend and weekday occupancy

Fig. 1.4: UK and National: Annual Weekend Bedroom Occupancy 2007 – 2011

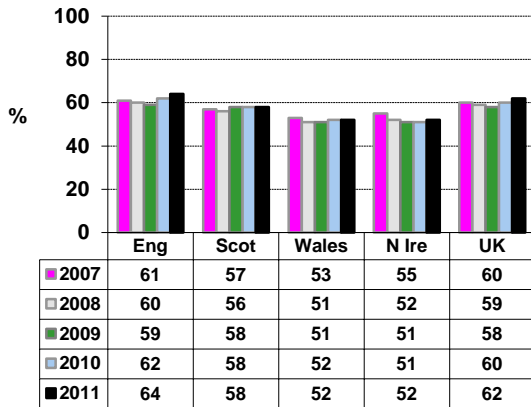


Fig. 1.5: UK and National: Annual Weekday Bedroom Occupancy 2007 – 2011

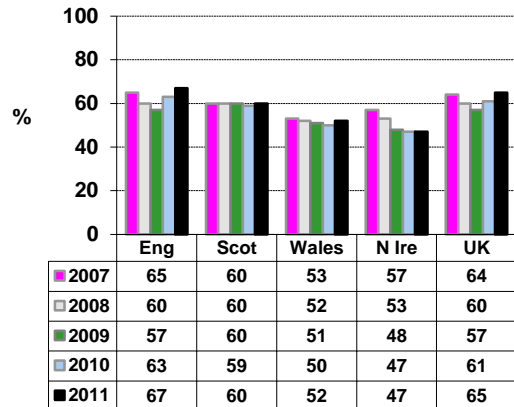


Fig. 1.6: UK and National: Annual Weekend Bedspace Occupancy 2007 – 2011

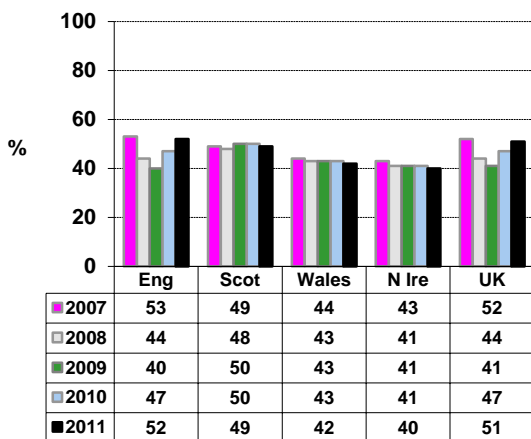
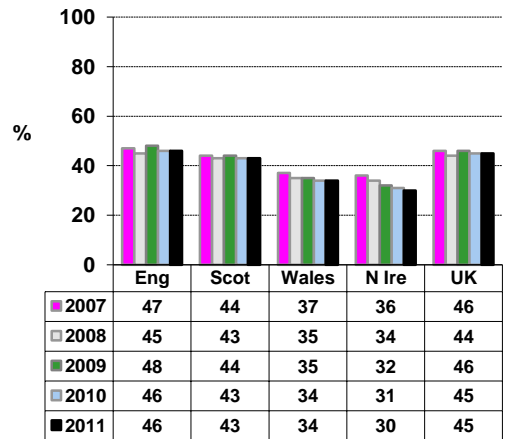


Fig. 1.7: UK and National: Annual Weekday Bedspace Occupancy 2007 – 2011



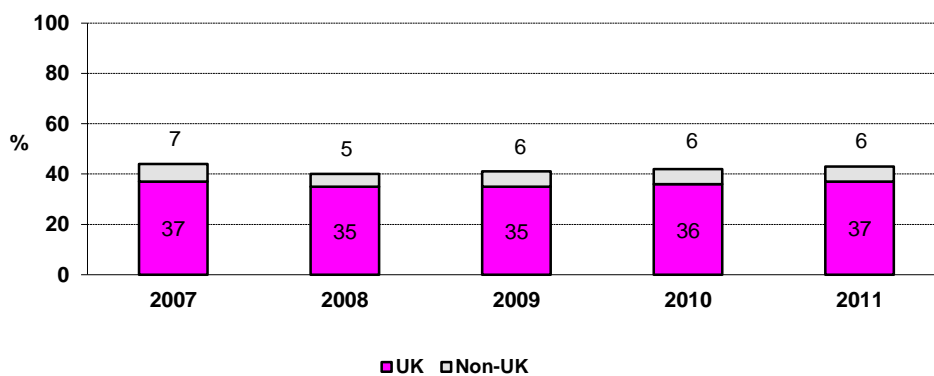
Compared with 2010, the UK annual average figures for weekend bedroom and bedspace occupancy increased (by 2 and 4 percentage points respectively). The UK weekday bedroom occupancy also increased (by 4 percentage points) with the weekday figure remaining at its 2010 figure.

Nationally it should be noted that the figures for England followed the UK pattern, while in Scotland, Wales and Northern Ireland both the weekend and weekday bedroom occupancy figures either rose (by 1 or 2 percentage points) or remained as in 2010; the figures for weekend bedspace occupancy fell by one percentage point in each of these areas with the weekday figures being unchanged in Scotland and Wales but falling (again by 1 percentage point) in Northern Ireland.

1.5 Origin of Visitors

It should be noted that 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. The UK figures for 2008, 2009, 2010 and 2011 used in figure 1.8 are therefore calculated only on figures for England, Wales and Northern Ireland while those in figure 1.9 are calculated only on figures for England and Northern Ireland.

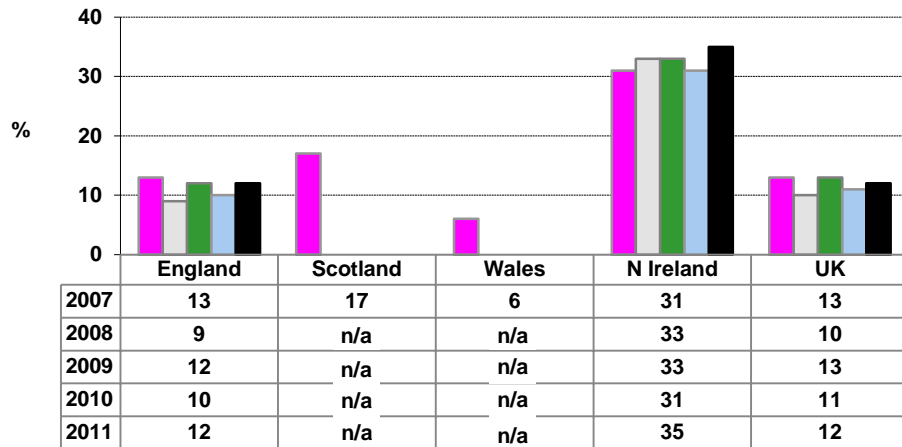
Fig. 1.8: UK: Annual Bedspace Occupancy 2007 - 2011 by Origin of Visitors



The 2011 annual average bedspace occupancy by non-UK visitors (6%) was the same as in 2010 while the annual average bedspace occupancy by UK residents rose by one percentage point to 37%.

It should be noted that these figures do not sum to the annual average bedspace occupancy figures for the UK as they are based on only those establishments able to differentiate between UK and non-UK visitors which is less than the total sample.

Fig. 1.9: UK and National: Annual Non-UK Arrivals as a Percentage of All Arrivals, 2007 - 2011



The 2011 annual average percentage of arrivals at serviced accommodation attributable to non-UK visitors was one percentage point higher than in 2010.

When compared with 2010, both England and Northern Ireland showed an increase (of 2 and 4 percentage points) in the percentage of non-UK arrivals.

1.6 Occupancy by type of establishment

UK annual average occupancy levels showed an increase in all types of accommodation when compared with 2010.

Fig. 1.10: UK: Annual Bedroom Occupancy 2007 - 2011 by Type of Establishment

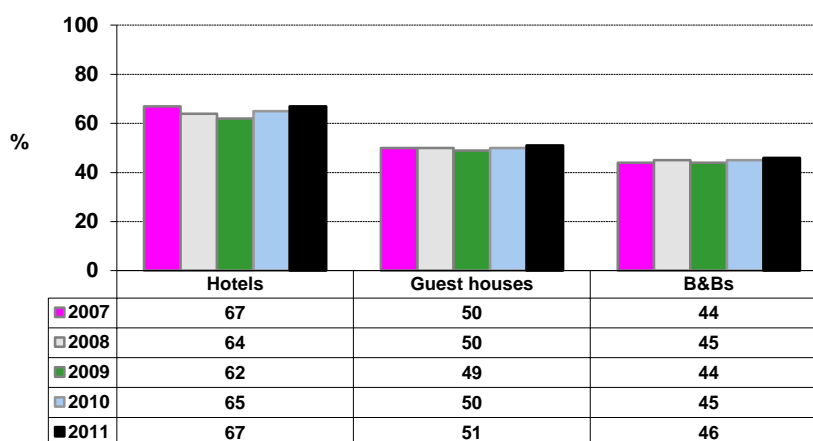
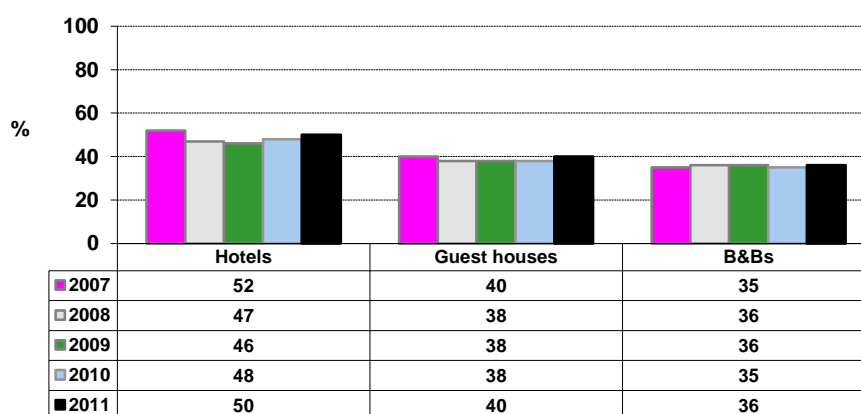


Fig. 1.11: UK: Annual Bedspace Occupancy 2007 - 2011 by Type of Establishment



When compared with 2007, 2011 occupancy levels in bed and breakfast establishments had increased. In guest houses bedroom occupancy had increased slightly with bedspace occupancy remaining as in 2007, while in hotels bedroom occupancy was the same as in 2006, but bedspace occupancy had fallen (by 2 percentage points).

Fig. 1.12: National: Annual Bedroom Occupancy 2010 and 2011 by Type of Establishment

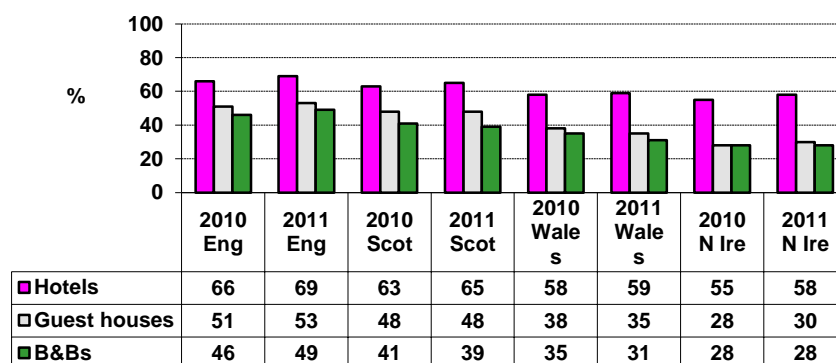
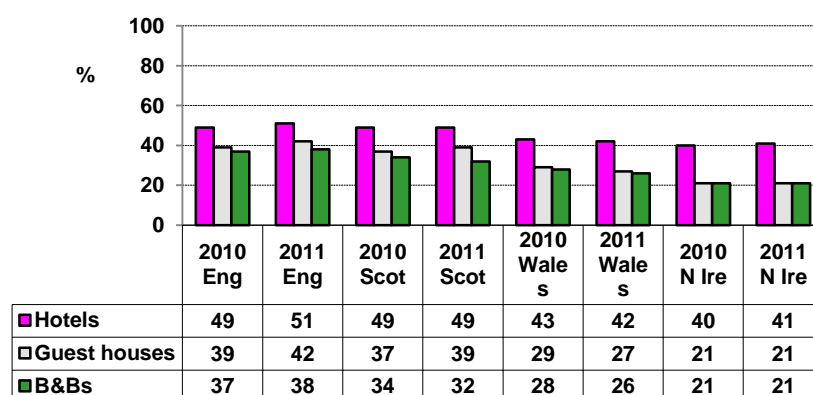


Fig. 1.13: National: Annual Bedspace Occupancy 2010 and 2011 by Type of Establishment



At a national level, when compared with 2010, occupancy levels in England increased in all types of accommodation. Scotland saw hotels recording an increase in bedroom occupancy, with bedspace occupancy remaining unchanged. Guest house figures remained unchanged, whilst bedroom occupancy and bedspace occupancy rose. Occupancy levels also fell in bed and breakfast establishments. In Wales only, bedroom occupancy rose, while all other occupancy levels fell. In Northern Ireland bedroom occupancy rose in hotels and guest houses, remaining the same as in 2010 for bed and breakfast establishments, whilst bedspace occupancy rose in hotels but remained unchanged in guest houses and bed and breakfast establishments.

1.7 Occupancy by location of establishment

Fig. 1.14: UK: Annual Bedroom Occupancy 2007 - 2011 by Location of Establishment

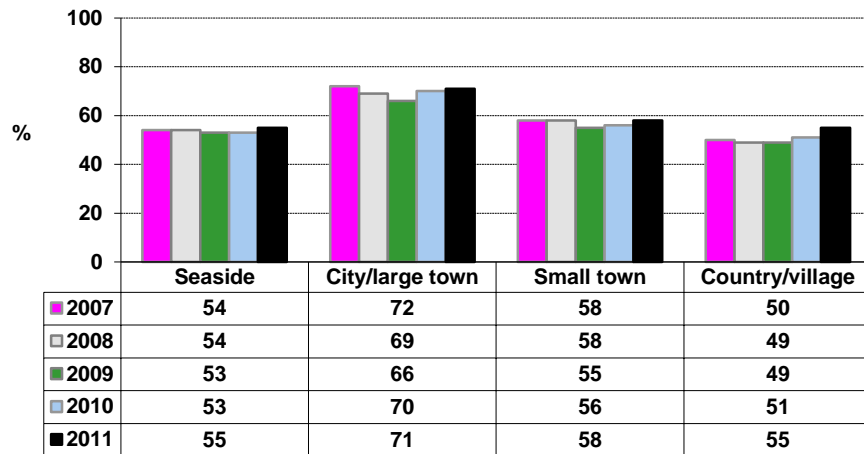
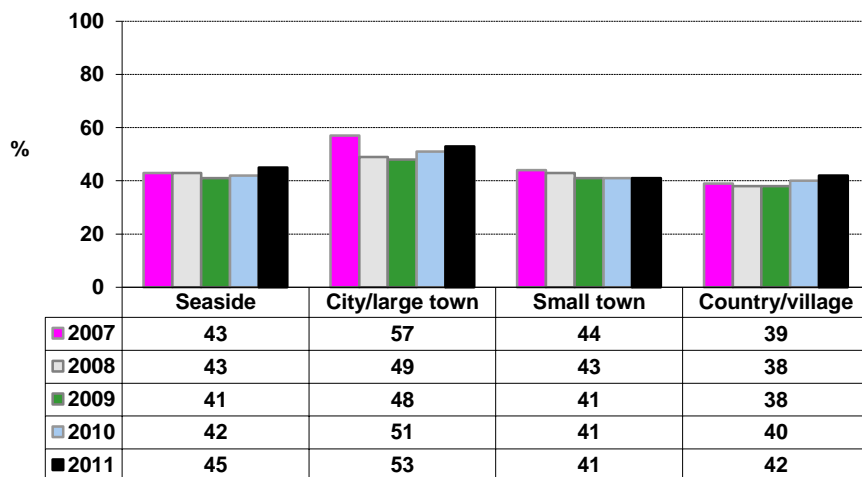


Fig. 1.15: UK: Annual Bedspace Occupancy 2007 - 2011 by Location of Establishment



Average annual occupancy levels rose in all types of locations with the exception of bedspace occupancy in small towns which remained at its 2010 level.

2. About the Occupancy Survey

2.1 Survey sponsors

As part of the EU Directive on Tourism Statistics adopted in November 1995, the UK is required to submit monthly occupancy rates for hotels and similar establishments (i.e. serviced accommodation) to Eurostat, the statistical office of the European Community. Since January 1997 each of the four national tourism organisations has been responsible for the implementation of an occupancy survey of serviced accommodation in its area, carried out according to a common specification and standard, thus ensuring the production of comparable occupancy data for the whole of the UK.

TNS RI Travel and Tourism has been the UK Survey Co-ordinator for these surveys since 2002 and collates the results from each of the national and regional surveys, combining them to produce occupancy rates for the UK as a whole.

2.2 Coverage of survey

The types of accommodation in the survey are those defined (in the EU Directive) as tourist accommodation which is arranged in rooms and where bed-making and cleaning services are provided. The survey therefore includes hotels (including motels, lodges and inns), guesthouses and private houses offering bed and breakfast to tourists (including farmhouses). It should be noted that only in Northern Ireland, where compulsory registration of tourist accommodation ensures an accurate stock record, is there a definition of the various types of accommodation. In England, Scotland and Wales the type is defined by each accommodation establishment itself in answering a questionnaire and therefore, because the criteria are not objectively defined, the distinction between types is not always clear and may vary slightly.

In 2010 there were about 45,050 establishments of this type in the UK which were known to the tourist boards, with a total of just over 1.47 million bedspaces available daily.

Figure 2.1: Distribution of total known accommodation stock: Number of establishments

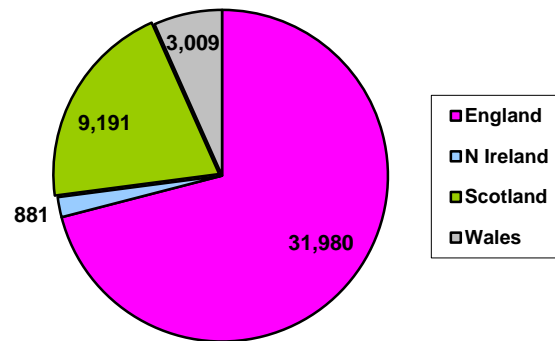
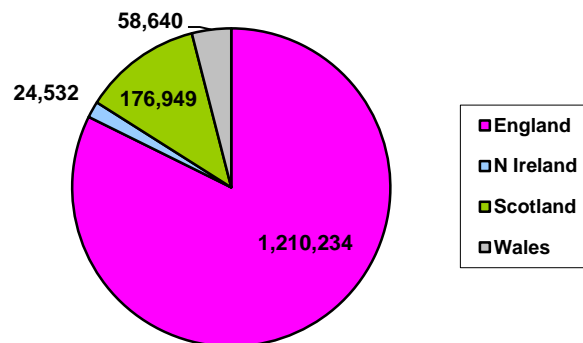


Figure 2.2: Distribution of total known accommodation stock: Number of bedspaces



2.3 Survey method

Establishments were invited to provide data for the survey on a monthly basis. Each month between 2,181 and 2,466 returned data and the occupancy rates in the report are calculated from these monthly samples. It should be noted that the target minimum sample size for Scotland, Wales and Northern Ireland is 200 open establishments while there is no target minimum sample size in England. Both the recruited samples (those establishments agreeing to provide data) and the analytical samples (those establishments returning monthly data) have been monitored during the year in an endeavour to ensure that the samples are as representative as possible of the known total stock.

The occupancy figures in this summary are calculated on the accommodation available each month - i.e. only open accommodation is included. In calculating

figures for the UK, occupancy rates from each country have been weighted using the number of bedspaces known to be available in the area that month.

2.4 Full National Reports

Individual tourism organisations in Scotland, Wales and Northern Ireland produce a wide range of other, more local, information from their own surveys which is available directly from them. It should be noted that this locally-produced information may be based on slightly different samples from the UK Survey, depending upon the timing of the analysis. The following full reports are available from the national tourist boards.

Northern Ireland:

Survey of Hotel and Guesthouse/B&B Accommodation Occupancy 2011: Free

Available online at:

<http://www.detini.gov.uk/deti-stats-index/tourism-statistics/stats-accomm-6.htm>

Scotland:

Scottish Accommodation Occupancy Survey 2011 Final Report: Free

Available online at:

http://www.visitscotland.org/research_and_statistics/tourismstatistics/national_statistics/accommodation_occupancy.aspx

Digital copies may be requested from:

VisitScotland Insight Department: research@visitscotland.com

Wales:

Wales Occupancy Survey for Serviced Accommodation 2011: Free

Available online at

<http://wales.gov.uk/topics/tourism/research/occupancy/annualreports/accoccrep/?lang=en>

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