



UK Occupancy Survey for Serviced Accommodation

Annual Summary 2010

JN:209489



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Introduction

This report presents a summary of the main findings from the UK Occupancy Survey for Serviced Accommodation 2010 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 2006 – 2010 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 15). 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. 2010 saw a change in contractor for the collection of data for England with VisitEngland appointing The Research Solution in place of BDRC Ltd to fulfil this role from April 2010. In addition, 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, care should therefore be taken in the interpretation of year-on-year changes

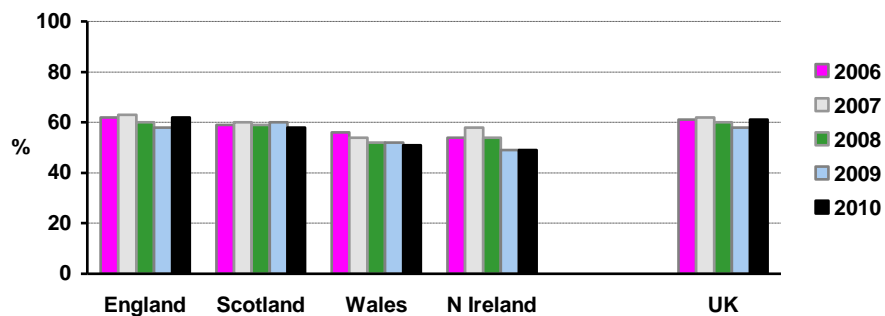


Overall the UK-wide 2010 occupancy levels showed an improvement when compared with 2009 although figures again varied throughout the UK. In England, occupancy levels rose encouragingly, while those in the rest of the UK either remained as in 2009 or fell slightly, with those in Scotland in particular being adversely affected by weather conditions at the beginning and end of the year and by the fallout from volcanic ash (from Iceland) in April.

1.2 Bedroom occupancy

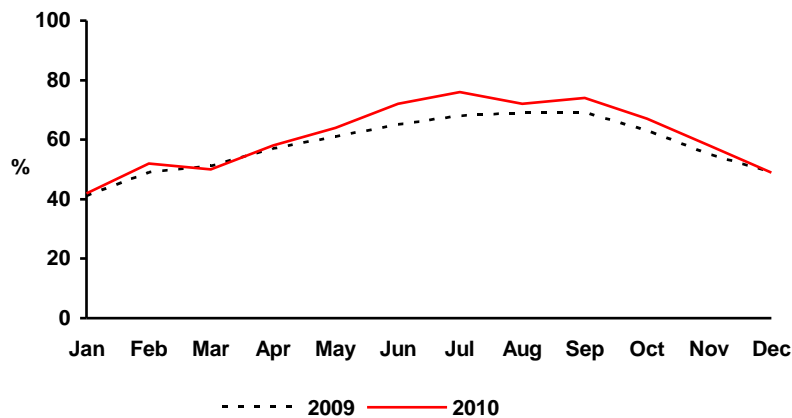
The 2010 UK annual average of 61% was three percentage points higher than in 2009. When compared with that year, the annual average increased in England (by 4 percentage points), remained unchanged in Northern Ireland and decreased by one percentage point in Wales and by two in Scotland.

Fig. 1.1: UK and National: Annual Bedroom Occupancy 2006 – 2010



2010 bedroom occupancy levels in England were the same as in 2006 while those in Scotland, Wales and Northern Ireland were 1, 5 and 5 percentage points below the 2006 levels.

Fig. 1.2: UK: Monthly Bedroom Occupancy 2009 and 2010



When compared with 2009, the UK monthly figures rose in every month except March (when the UK average was 1 percentage point lower than the previous year) and December (when the figure was the same as in 2009). The greatest rises (of 7 and 8 percentage points) were in June and July.

When compared with four years previously (i.e. 2006), four months (June, July, September and October) showed an increase in the UK bedroom occupancy figure, two (May and August) were at the same level while the remaining six months showed a decrease. 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, figures for much of the year varied little from 2006 with the exception of December where weather conditions in 2010 made travel extremely difficult and the 2010 figure was seven percentage points lower than in 2006. In Wales and Northern Ireland, bedroom occupancy figures were consistently lower than in 2006 (except for July in Northern Ireland when the 2010 figure was 4 percentage points higher than in 2006).

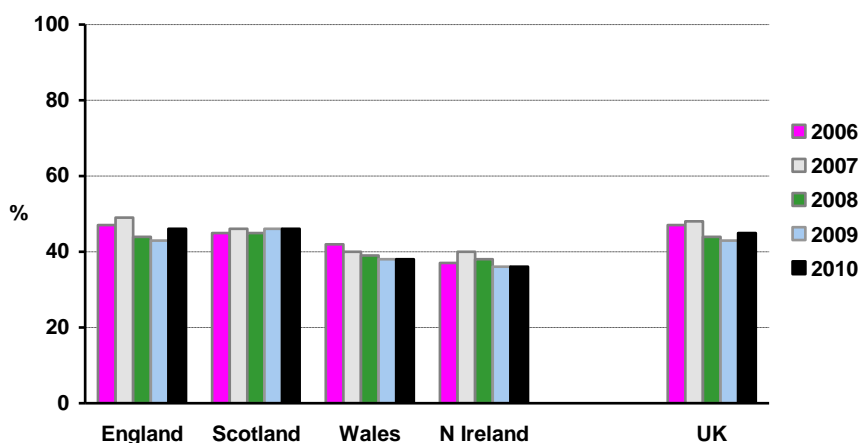
Table 1: UK and National: Bedroom Occupancy 2006 – 2010

| | Bedroom Occupancy (%) | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------|-----------------------|----|----|----|-----------|----------|----|----|----|-----------|-------|----|----|----|-----------|------------------|----|----|----|-----------|----|----|----|----|-----------|
| | England | | | | | Scotland | | | | | Wales | | | | | Northern Ireland | | | | | UK | | | | |
| | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 |
| January | 46 | 50 | 45 | 42 | 43 | 39 | 39 | 43 | 42 | 38 | 35 | 35 | 35 | 32 | 31 | 39 | 40 | 38 | 35 | 32 | 44 | 47 | 44 | 41 | 42 |
| February | 55 | 54 | 55 | 49 | 53 | 49 | 50 | 50 | 49 | 50 | 45 | 44 | 45 | 41 | 43 | 48 | 47 | 49 | 46 | 42 | 53 | 53 | 54 | 49 | 52 |
| March | 57 | 57 | 55 | 51 | 50 | 49 | 52 | 52 | 52 | 50 | 47 | 47 | 46 | 43 | 45 | 51 | 54 | 51 | 47 | 46 | 55 | 56 | 54 | 51 | 50 |
| April | 61 | 61 | 59 | 58 | 59 | 58 | 56 | 55 | 58 | 55 | 54 | 52 | 49 | 51 | 53 | 56 | 58 | 55 | 50 | 40 | 60 | 60 | 58 | 57 | 58 |
| May | 64 | 64 | 65 | 61 | 65 | 65 | 68 | 66 | 67 | 66 | 63 | 60 | 60 | 56 | 57 | 58 | 63 | 62 | 54 | 53 | 64 | 64 | 65 | 61 | 64 |
| June | 69 | 72 | 66 | 65 | 73 | 71 | 71 | 69 | 70 | 72 | 64 | 63 | 59 | 62 | 63 | 63 | 67 | 64 | 56 | 58 | 69 | 71 | 66 | 65 | 72 |
| July | 71 | 71 | 71 | 67 | 77 | 71 | 71 | 70 | 74 | 74 | 69 | 64 | 64 | 66 | 64 | 57 | 64 | 62 | 58 | 61 | 71 | 70 | 70 | 68 | 76 |
| August | 71 | 73 | 70 | 67 | 72 | 79 | 80 | 77 | 79 | 78 | 72 | 70 | 67 | 67 | 65 | 66 | 72 | 69 | 65 | 63 | 72 | 74 | 71 | 69 | 72 |
| September | 74 | 71 | 69 | 69 | 75 | 73 | 74 | 70 | 70 | 72 | 69 | 66 | 62 | 64 | 62 | 65 | 70 | 63 | 55 | 60 | 73 | 71 | 69 | 69 | 74 |
| October | 66 | 69 | 64 | 64 | 69 | 60 | 61 | 63 | 61 | 62 | 59 | 56 | 54 | 55 | 55 | 54 | 62 | 54 | 49 | 50 | 65 | 67 | 63 | 63 | 67 |
| November | 61 | 62 | 56 | 56 | 61 | 50 | 51 | 53 | 52 | 51 | 50 | 47 | 45 | 45 | 45 | 49 | 57 | 46 | 40 | 43 | 59 | 59 | 55 | 55 | 58 |
| December | 56 | 51 | 48 | 51 | 52 | 43 | 42 | 43 | 44 | 36 | 42 | 41 | 37 | 39 | 34 | 39 | 42 | 38 | 36 | 35 | 53 | 49 | 47 | 49 | 49 |
| April–Oct Average | 68 | 69 | 66 | 64 | 70 | 68 | 69 | 67 | 68 | 68 | 64 | 62 | 59 | 60 | 60 | 60 | 65 | 61 | 55 | 55 | 68 | 68 | 66 | 65 | 69 |
| July–Sept Average | 72 | 72 | 70 | 68 | 75 | 74 | 75 | 72 | 74 | 75 | 70 | 67 | 64 | 66 | 64 | 63 | 68 | 65 | 59 | 61 | 72 | 72 | 70 | 68 | 74 |
| Annual Average | 62 | 63 | 60 | 58 | 62 | 59 | 60 | 59 | 60 | 58 | 56 | 54 | 52 | 52 | 51 | 54 | 58 | 54 | 49 | 49 | 61 | 62 | 60 | 58 | 61 |

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 2006 – 2010



Patterns of bedspace occupancy were again broadly similar to those for bedroom occupancy with the 2010 UK monthly figures being higher than the 2009 figure for nine months and the same as the 2009 figure in January, March and April.

Annual average bedspace occupancy rose by one percentage point over the period 2006-2010 in Scotland but fell by a similar figure in England and Northern Ireland and by four percentage points in Wales.

| Table 2: UK and National: Bedspace Occupancy 2006 – 2010 | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|-------------------------------|----|----|----|-----------|-----------------|----|----|----|-----------|--------------|----|----|----|-----------|-------------------------|----|----|----|-----------|-----------|----|----|----|-----------|
| | Bedspace Occupancy (%) | | | | | | | | | | | | | | | | | | | | | | | | |
| | England | | | | | Scotland | | | | | Wales | | | | | Northern Ireland | | | | | UK | | | | |
| | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 | 06 | 07 | 08 | 09 | 10 |
| January | 31 | 35 | 29 | 27 | 28 | 28 | 26 | 29 | 29 | 27 | 22 | 21 | 21 | 21 | 20 | 25 | 26 | 25 | 24 | 20 | 30 | 33 | 29 | 27 | 27 |
| February | 38 | 40 | 37 | 35 | 36 | 34 | 36 | 36 | 35 | 36 | 31 | 31 | 30 | 28 | 30 | 32 | 30 | 33 | 33 | 30 | 37 | 39 | 36 | 35 | 36 |
| March | 40 | 42 | 39 | 36 | 36 | 34 | 37 | 39 | 37 | 36 | 33 | 33 | 34 | 30 | 32 | 34 | 37 | 37 | 32 | 31 | 39 | 41 | 39 | 36 | 36 |
| April | 48 | 49 | 42 | 43 | 44 | 45 | 43 | 40 | 46 | 43 | 41 | 40 | 35 | 38 | 40 | 41 | 41 | 36 | 36 | 33 | 47 | 47 | 41 | 43 | 43 |
| May | 49 | 51 | 49 | 47 | 48 | 50 | 53 | 52 | 53 | 52 | 47 | 47 | 47 | 43 | 43 | 40 | 42 | 43 | 39 | 37 | 49 | 51 | 49 | 47 | 48 |
| June | 53 | 58 | 49 | 49 | 53 | 55 | 57 | 53 | 55 | 56 | 48 | 49 | 44 | 45 | 47 | 45 | 46 | 44 | 40 | 43 | 53 | 57 | 49 | 49 | 53 |
| July | 58 | 60 | 54 | 54 | 59 | 60 | 57 | 57 | 62 | 61 | 56 | 51 | 50 | 51 | 51 | 44 | 46 | 45 | 46 | 49 | 58 | 59 | 54 | 55 | 59 |
| August | 60 | 65 | 59 | 57 | 58 | 67 | 69 | 65 | 67 | 66 | 61 | 59 | 55 | 55 | 53 | 51 | 54 | 54 | 53 | 50 | 61 | 65 | 59 | 58 | 59 |
| September | 57 | 56 | 50 | 51 | 56 | 57 | 58 | 53 | 54 | 56 | 54 | 51 | 48 | 48 | 47 | 45 | 47 | 44 | 38 | 43 | 57 | 56 | 50 | 51 | 55 |
| October | 49 | 51 | 47 | 48 | 52 | 45 | 47 | 47 | 47 | 48 | 43 | 41 | 40 | 40 | 40 | 36 | 40 | 37 | 35 | 28 | 48 | 50 | 46 | 47 | 50 |
| November | 43 | 45 | 39 | 38 | 43 | 37 | 38 | 38 | 37 | 37 | 34 | 32 | 32 | 30 | 29 | 30 | 39 | 30 | 27 | 29 | 41 | 43 | 38 | 37 | 41 |
| December | 43 | 40 | 34 | 36 | 39 | 32 | 33 | 32 | 33 | 28 | 32 | 29 | 27 | 28 | 23 | 27 | 29 | 26 | 26 | 26 | 41 | 38 | 33 | 35 | 36 |
| April–Oct Average | 53 | 56 | 50 | 50 | 53 | 54 | 55 | 53 | 55 | 55 | 50 | 48 | 46 | 46 | 46 | 43 | 45 | 43 | 41 | 42 | 53 | 55 | 50 | 50 | 53 |
| July–Sept Average | 58 | 60 | 54 | 54 | 58 | 61 | 62 | 59 | 61 | 61 | 57 | 54 | 51 | 51 | 50 | 47 | 49 | 48 | 46 | 47 | 58 | 60 | 55 | 55 | 58 |
| Annual Average | 47 | 49 | 44 | 43 | 46 | 45 | 46 | 45 | 46 | 46 | 42 | 40 | 39 | 38 | 38 | 37 | 40 | 38 | 36 | 36 | 47 | 48 | 44 | 43 | 45 |

1.4 Weekend and weekday occupancy

Fig. 1.4: UK and National: Annual Weekend Bedroom Occupancy 2006 – 2010

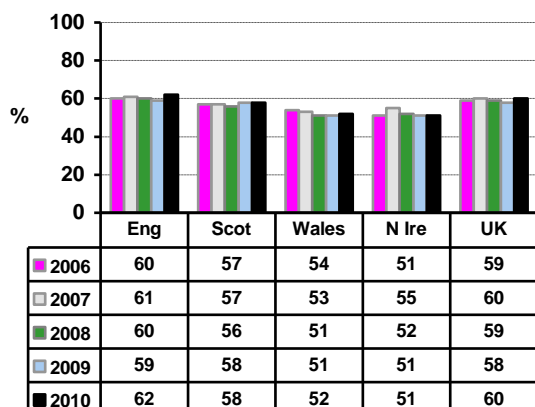


Fig. 1.5: UK and National: Annual Weekday Bedroom Occupancy 2006 – 2010

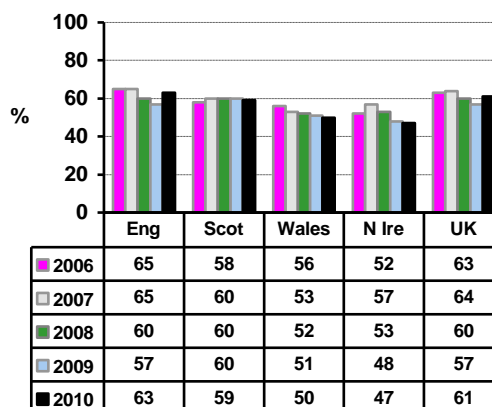


Fig. 1.6: UK and National: Annual Weekend Bedspace Occupancy 2006 – 2010

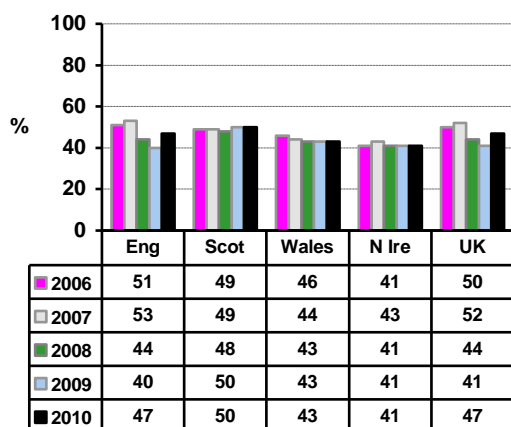
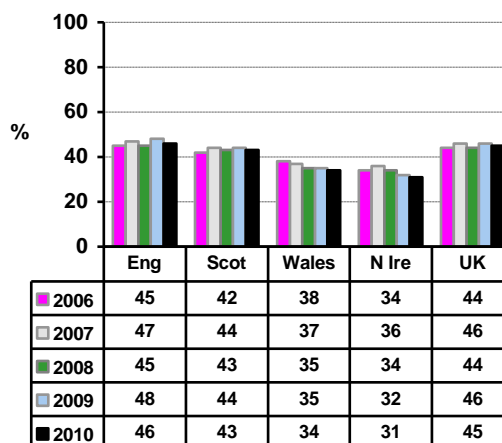


Fig. 1.7: UK and National: Annual Weekday Bedspace Occupancy 2006 - 2010



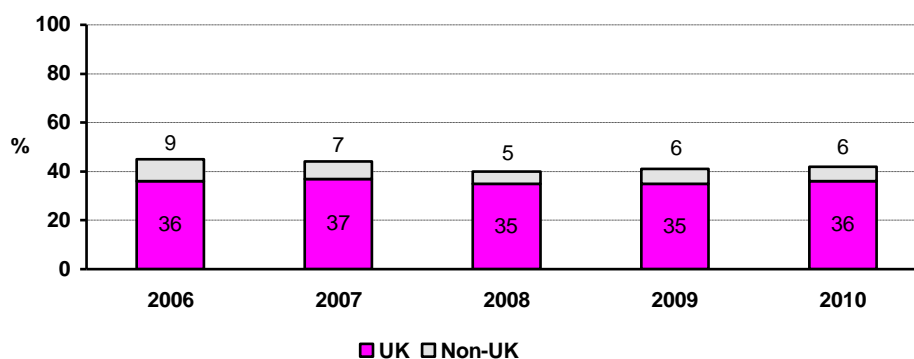
Compared with 2009, the UK annual average figures for weekend bedroom and bedspace occupancy increased (by 2 and 6 percentage points respectively). The UK weekday bedroom occupancy also increased (by 4 percentage points) but the weekday figure fell by one percentage point.

Nationally it should be noted that the figures for England followed the UK pattern, while in Scotland, Wales and Northern Ireland the weekend figures either rose slightly or remained as in 2009 with the weekday figures falling by one percentage point.

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 and 2009 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.

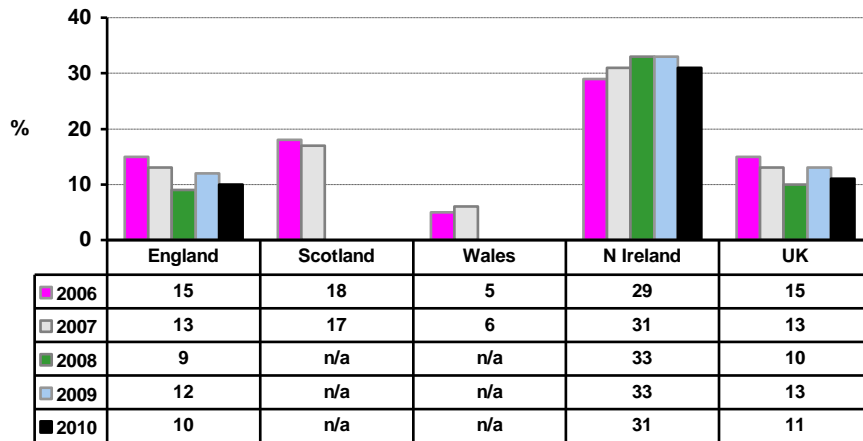
Fig. 1.8: UK: Annual Bedspace Occupancy 2006 - 2010 by Origin of Visitors



The 2010 annual average bedspace occupancy by non-UK visitors (6%) was the same as in 2009 while the annual average bedspace occupancy by UK residents rose by one percentage point to 36%.

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, 2006 - 2010



The 2010 annual average percentage of arrivals at serviced accommodation attributable to non-UK visitors was two percentage points lower than in 2009.

When compared with 2009, both England and Northern Ireland showed a decrease of two percentage points in the percentage of non-UK arrivals.

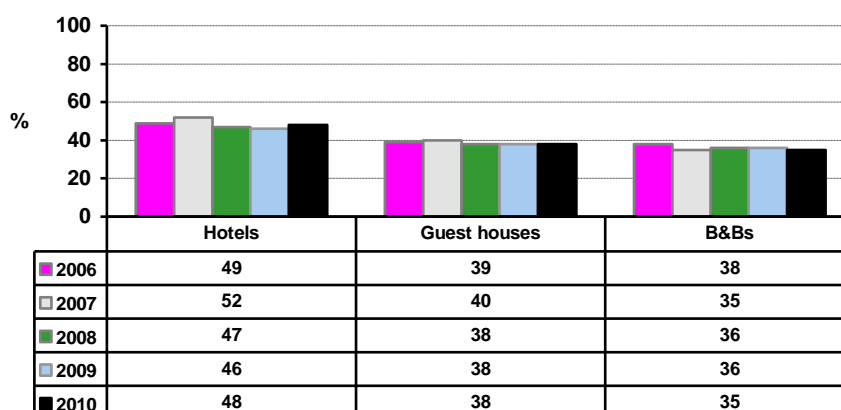
1.6 Occupancy by type of establishment

UK bedroom occupancy levels in all types of accommodation showed an increase when compared with 2009. Bedspace occupancy in hotels also increased, and in guest houses remained as in 2009 but in bed and breakfast establishments fell slightly.

Fig. 1.10: UK: Annual Bedroom Occupancy 2006 - 2010 by Type of Establishment



Fig. 1.11: UK: Annual Bedspace Occupancy 2006- 2010 by Type of Establishment



2010 bedroom occupancy levels in hotels and guest houses were the same as in 2006, but bedspace had fallen slightly. In bed and breakfast establishments the annual figures for

both bedroom and bedspace occupancy had fallen (by 5 percentage points for bedroom occupancy and by 3 for bedspace occupancy).

Fig. 1.12: National: Annual Bedroom Occupancy 2009 and 2010 by Type of Establishment

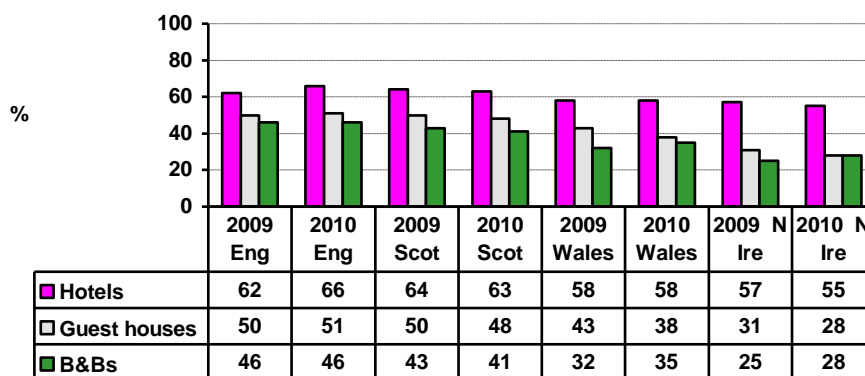
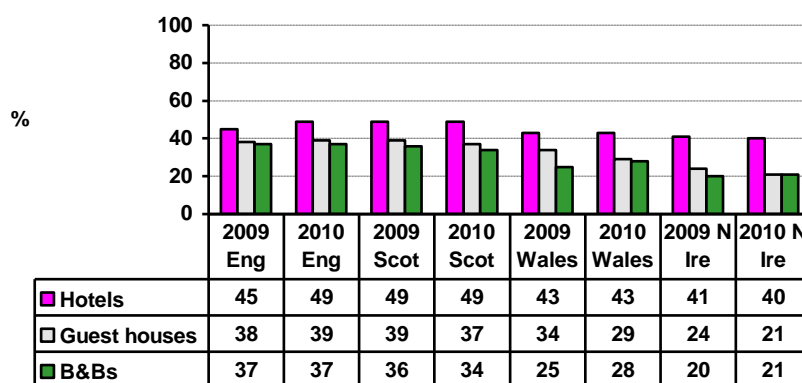


Fig. 1.13: National: Annual Bedspace Occupancy 2009 and 2010 by Type of Establishment



At a national level, when compared with 2009, occupancy levels in hotels and guest houses in England increased with those in bed and breakfast establishments remaining unchanged. In Wales, occupancy levels in hotels remained as in 2009, fell in guest houses and rose in bed and breakfast establishments. In Northern Ireland, occupancy levels fell in hotels and guest houses but rose in bed and breakfast establishments. In Scotland bedspace

occupancy in hotels remained as in 2009 but bedroom occupancy fell while both measures of occupancy fell in guest houses and bed and breakfast establishments.

1.7 Occupancy by location of establishment

Fig. 1.14: UK: Annual Bedroom Occupancy 2006 - 2010 by Location of Establishment

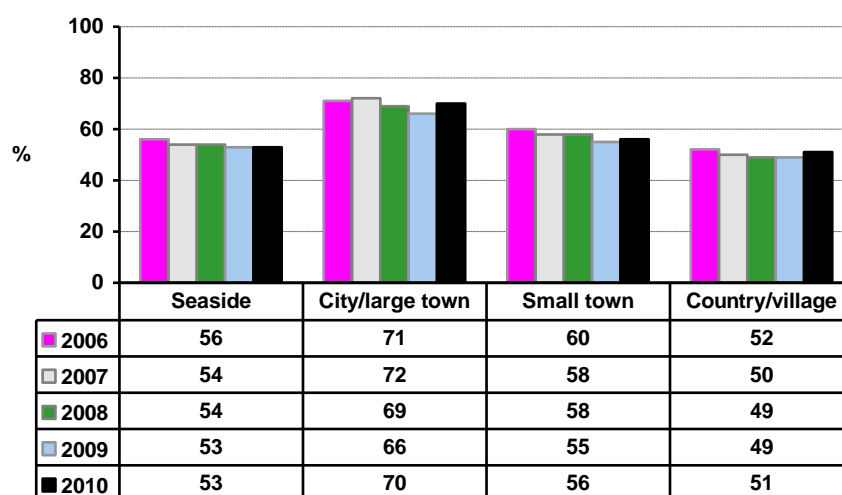
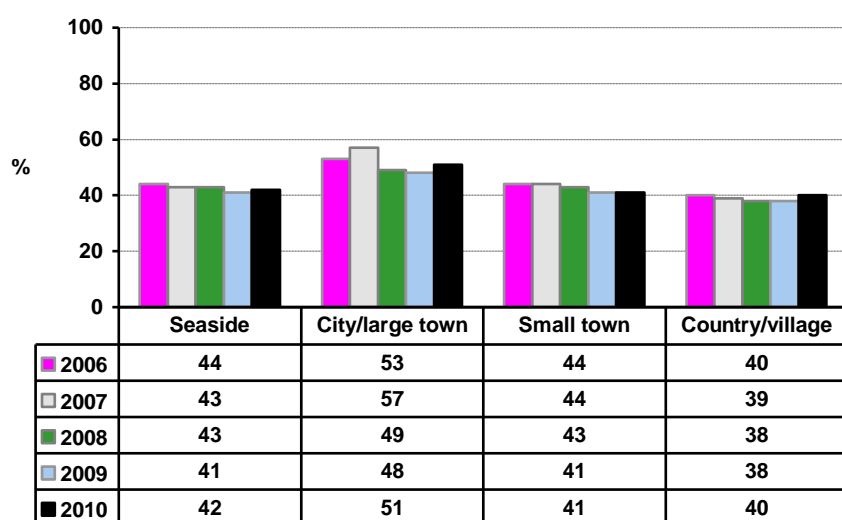


Fig. 1.15: UK: Annual Bedspace Occupancy 2006 - 2010 by Location of Establishment



When compared with 2009, city/large town and country/village locations saw an increase in average annual occupancy levels, with the greatest rises (of 4 and 3 percentage points) being in city/large town locations. Bedroom occupancy in seaside locations remained at its

2009 figure with bedspace occupancy recording a slight rise while in small town locations the position was reversed with bedroom occupancy showing a slight rise and bedspace occupancy remaining as in 2009.

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 2009 there were about 45,450 establishments of this type in the UK which were known to the tourist boards, with a total of just under 1.36 million bedspaces available daily.

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

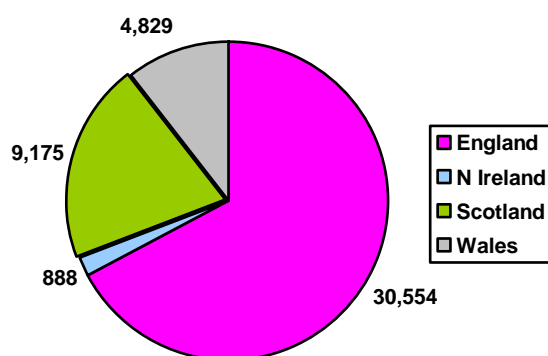
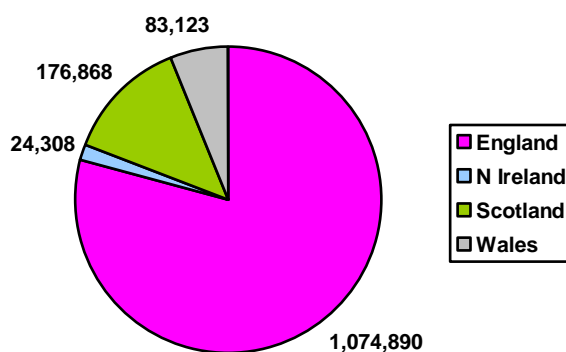


Figure 2.2: Distribution of total known accommodation stock: Number of bedspaces



2.3 Survey method

Establishments were invited to provide data for the survey on a monthly basis. Each month between 1,622 and 2,485 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. Where applicable, orders should be sent including remittances.

Northern Ireland:

Survey of Hotel Occupancy Annual Report 2010: *Free*;
Survey of Guesthouse and Bed and Breakfast Accommodation 2010 *Free*
Tourism Statistics Branch
Netherleigh
Massey Avenue
Belfast
BT4 2JP
or online at www.detini.gov.uk

Scotland:

Scottish Accommodation Occupancy Survey 2010 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
Ocean Point One
94 Ocean Drive
Edinburgh EH6 6JH
or: research@visitscotland.com

Wales:

Wales Occupancy Survey 2010 Free
Available online at <http://new.wales.gov.uk/topics/tourism/research/occupancy/annualreports>
Or from:
Visit Wales
Research
Brunel House
Cardiff CF24 OUY
or: tourismresearch@wales.gsi.gov.uk