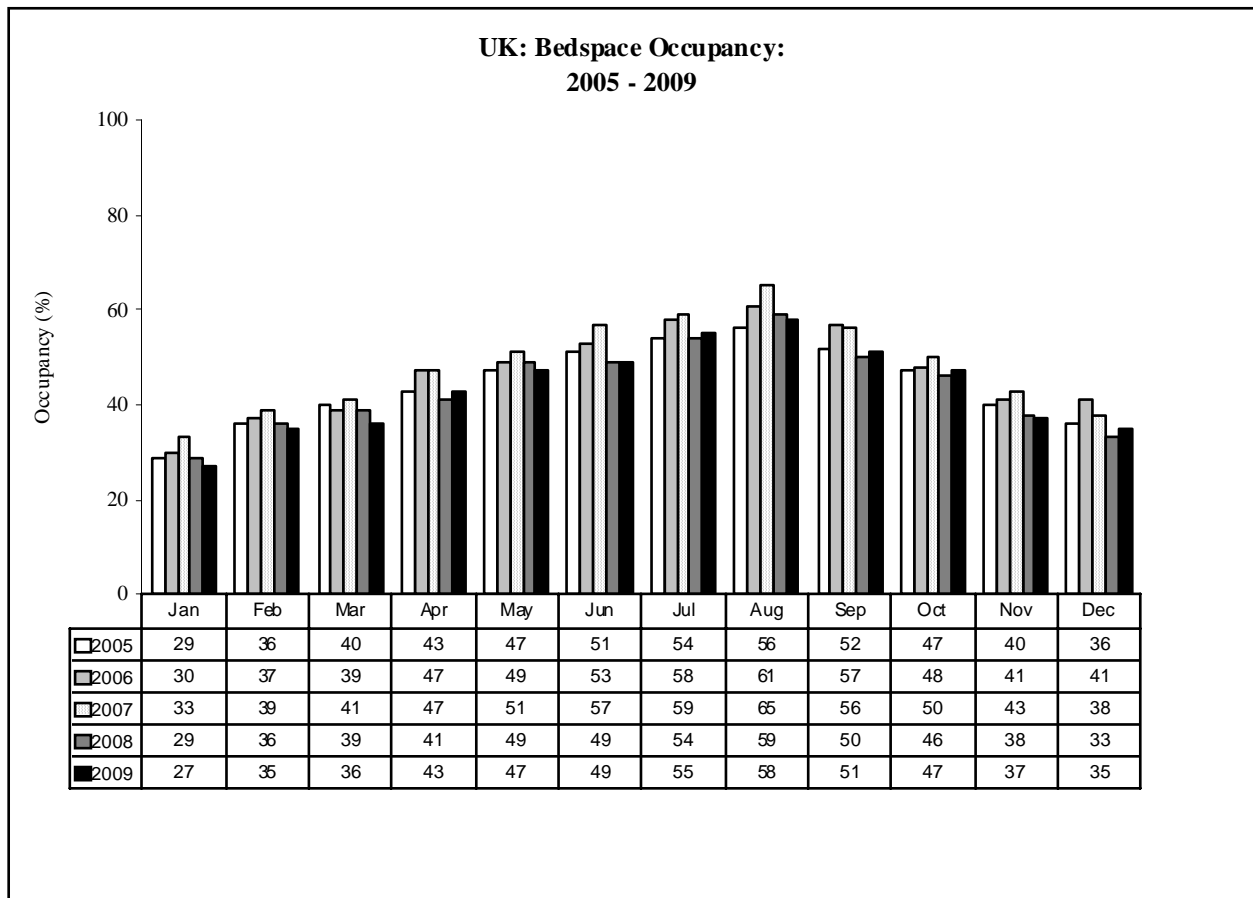


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

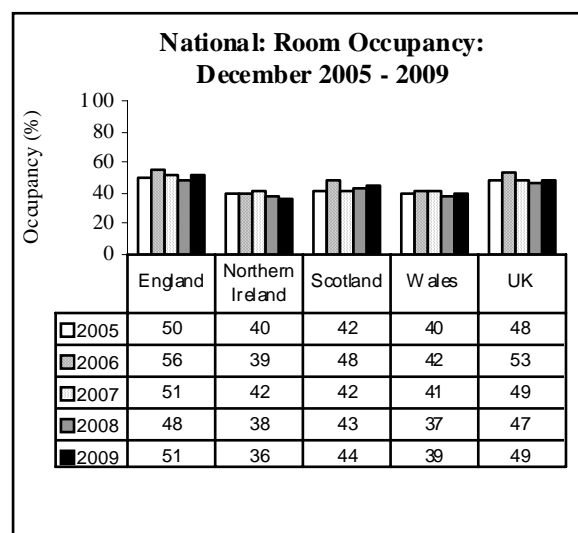
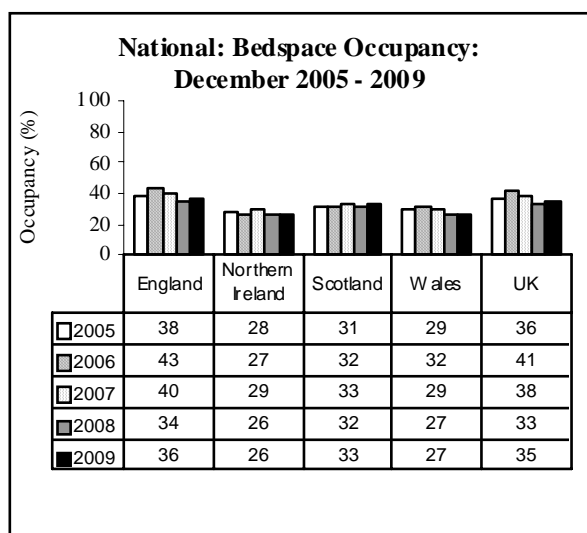
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

DECEMBER 2009



- 1684 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 December 2009 was 35%, two percentage points higher than in December 2008. At 49%, room occupancy was also two percentage points higher than in December 2008.



- Bedspace occupancy varied from 36% in England to 26% in Northern Ireland, while room occupancy varied from 51% in England to 36% in Northern Ireland.
- When compared with December 2008, occupancy levels rose in England and Scotland – by 2 and 3 percentage points for bedspace and room occupancy respectively in England and by 1 percentage point for both measures of occupancy in Scotland. Bedspace occupancy remained at its December 2008 level in both Wales and Northern Ireland while room occupancy rose (by 2 percentage points) in Wales but fell by a similar amount in Northern Ireland.
- When compared with four years earlier, both measures of occupancy in Scotland had risen (by 2 percentage points). In England room occupancy had risen (by 1 percentage point) but bedspace occupancy had fallen (by 2 percentage points) while in Wales and Northern Ireland both room and bedspace occupancy had fallen (by up to 4 percentage points (room occupancy in Northern Ireland)).
- Bedspace occupancy by non-UK residents in England and Northern Ireland rose slightly when compared with December 2008 and 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)).

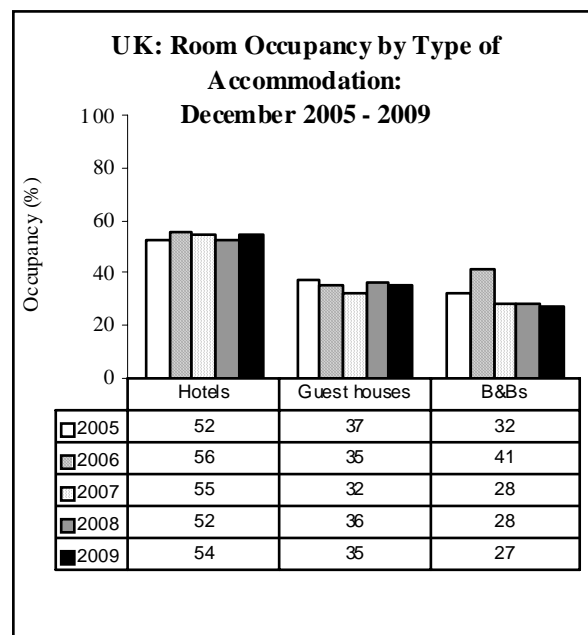
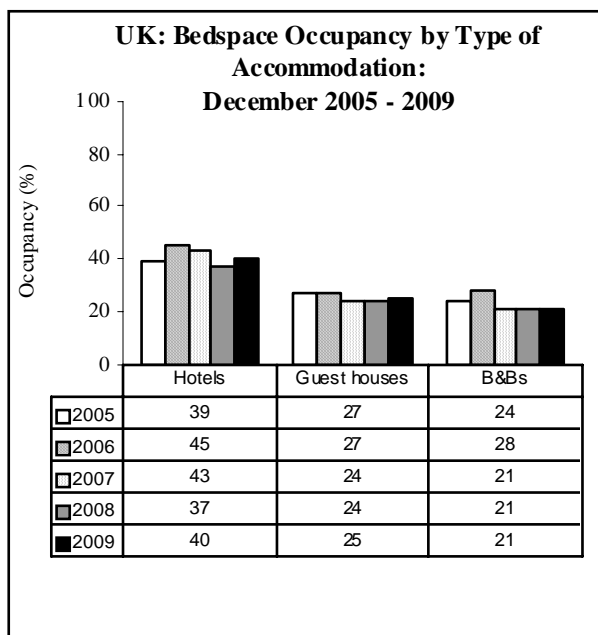
Table 1: Occupancy Levels: December 2007 – 2009

	Bedspace occupancy %			Room occupancy %			Sample size		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	40	34	36	51	48	51	647	953	1051
Northern Ireland	29	26	26	42	38	36	169	190	149
Scotland	33	32	33	42	43	44	291	310	326
Wales	29	27	27	41	37	39	136	172	158
UK	38	33	35	49	47	49	1243	1625	1684

Table 2: UK/Non-UK Occupancy Levels: December 2007 – 2009 (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		
	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	30	27	27	3	3	4	7	7	9	11	11	13	647	953	1051
Northern Ireland	22	19	17	7	8	9	28	30	32	25	29	35	169	190	149
Scotland	26	0	0	3	0	0	9	0	0	11	0	0	291	310	326
Wales	26	23	22	1	1	1	3	0	0	4	4	4	136	172	158
UK	29	27	26	3	3	4	7	7	9	11	11	13	1243	1625	1684

** figures not available



- When compared with December 2008, occupancy levels in hotels had risen (by 3 percentage points for bedspace occupancy and by 2 for room occupancy) as had bedspace occupancy in guest houses. Bedspace occupancy in bed and breakfast establishments had remained as in December 2008 but room occupancy in both guest houses and bed and breakfast establishments had fallen (by 1 percentage point in each case) (see Table 3).
- When compared with December 2008, both measures of occupancy had risen in 2 size categories (those with 11-25 and 26-50 letting bedrooms), with the greatest rises (of 4 percentage points for bedspace occupancy and 6 for room occupancy) being seen in the latter category. Bedpace occupancy had also risen by 4 percentage points in the 51-100 letting bedrooms size category and by 1 percentage point in the largest size establishments (those with more than 100 letting bedrooms). However room occupancy had fallen (by 1 percentage point) in both of these size categories. In the smaller establishments, bedspace occupancy remained at its December 2008 level in both the 1-3 and 4-10 size categories as did room occupancy in the latter, while smallest establishments saw room occupancy fall by 2 percentage points (see Table 5).
- When compared with December 2008, occupancy levels in city/large town, small town and country/village locations rose by up to 3 percentage points (bedspace occupancy in city/large town and small town locations and room occupancy in small town and country/village locations). In seaside locations both measures of occupancy fell by 1 percentage point (see Table 6).
- Establishments with a maximum tariff of £20.00-£29.99 and £50.00-£59.99 both showed an increase in occupancy levels (of between 1 and 5 percentage points) when compared with December 2008. Those establishments in the £40.00-£49.99 and over £60 tariff bands experienced a rise in bedpace occupancy with room occupancy remaining at its December 2008 level while those establishments in the £30.00-£39.99 tariff band showed 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: December 2007 – 2009

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	45	37	41	57	53	55	236	309	361
Northern Ireland	35	32	31	50	46	44	64	72	70
Scotland	37	36	37	48	47	49	188	218	228
Wales	34	33	34	48	45	47	79	94	89
UK	43	37	40	55	52	54	567	693	748
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	25	26	26	33	38	37	116	234	252
Northern Ireland	18	12	17	28	19	21	21	19	16
Scotland	22	20	19	30	29	27	47	45	47
Wales	21	17	19	26	23	27	21	32	31
UK	24	24	25	32	36	35	205	330	346
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	23	22	23	30	30	30	295	405	433
Northern Ireland	14	10	8	20	15	11	84	99	63
Scotland	18	16	13	21	23	18	56	47	51
Wales	11	13	12	15	17	16	36	46	38
UK	21	21	21	28	28	27	471	597	585

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: December 2007 – 2009 (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		
	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009	2007	2008	2009
England	45	31	34	37	37	40	51	49	51	53	47	50	7	7	10	8	6	8	11	11	13	10	10	12
Northern Ireland	30	31	32	26	22	26	39	40	42	41	34	39	28	31	32	31	33	34	26	29	37	26	31	41
Scotland	36	35	35	30	31	32	41	40	41	42	44	45	9	0	0	10	0	0	11	0	0	11	0	0
Wales	30	29	29	27	26	25	38	36	37	42	38	39	2	0	0	4	0	0	3	3	3	5	5	5
UK	42	31	34	35	35	38	48	47	49	51	46	48	7	7	10	8	7	9	11	11	13	10	10	12

** figures not available

Table 5: Occupancy Levels by Size: December 2007 – 2009

a: Percentage Bedspace Occupancy																								
	1 – 3 rooms				4 – 10 rooms				11 – 25 rooms				26 – 50 rooms				51 – 100 rooms				>100 rooms			
	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009
England	18	18	18	320	25	25	25	348	37	32	34	144	42	36	41	103	46	44	48	69	54	37	37	67
Northern Ireland	7	5	3	55	18	13	16	17	30	23	23	27	32	25	24	17	33	30	29	18	44	41	36	15
Scotland	15	14	12	41	23	21	20	78	29	29	32	66	39	35	35	49	42	45	46	40	48	46	47	50
Wales	12	12	10	32	23	19	19	48	33	28	29	27	37	34	36	27	40	36	35	13	33	42	46	11
UK	17	17	17	448	25	24	24	491	36	31	33	264	41	36	40	196	45	43	47	140	52	38	39	143
B: Percentage Bedroom Occupancy																								
England	24	25	24	320	33	33	33	348	46	43	44	144	52	46	54	103	57	58	57	69	67	60	58	67
Northern Ireland	9	8	4	55	29	22	20	17	46	35	33	27	43	35	33	17	48	45	41	18	62	57	52	15
Scotland	19	21	16	41	31	30	30	78	38	38	42	66	49	45	44	49	53	55	56	40	60	57	62	50
Wales	14	16	15	32	30	25	26	48	43	40	40	27	51	47	47	27	52	51	51	13	56	55	60	11
UK	22	24	22	448	32	32	32	491	45	42	43	264	51	46	52	196	56	57	56	140	65	59	58	143

Table 6: Occupancy Levels by Location: December 2007 – 2009**A: Percentage Bedspace Occupancy**

	Seaside				City/large town				Small town				Country/village			
	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009
England	33	31	30	226	51	40	44	228	39	30	33	218	27	27	27	372
Northern Ireland	24	19	17	31	35	32	31	57	32	27	26	17	18	15	19	44
Scotland	28	28	24	42	43	41	40	112	27	28	27	76	27	25	28	96
Wales	40	31	29	33	35	44	44	20	28	21	23	22	23	22	21	74
UK	33	30	29	332	49	40	43	417	37	29	32	333	27	26	27	586

B: Percentage Bedroom Occupancy

England	41	41	40	226	64	59	62	228	49	42	46	218	37	36	39	372
Northern Ireland	33	26	28	31	50	46	42	57	47	41	36	17	25	22	25	44
Scotland	37	36	31	42	54	53	53	112	38	39	37	76	34	33	36	96
Wales	50	41	38	33	56	55	60	20	46	31	38	22	30	29	28	74
UK	41	40	39	332	62	58	60	417	47	41	44	333	36	35	38	586

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 2007 – 2009 (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			
	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009	2007	2008	2009	Sample size 2009
England	13	-	-	-	20	15	16	97	23	23	19	215	28	26	29	154	32	35	38	85	48	36	38	390
Northern Ireland	-	-	-	-	12	9	5	33	19	19	11	29	30	18	20	26	27	29	25	12	37	34	33	47
Scotland	9	-	-	-	26	18	20	52	24	24	27	60	34	29	28	46	36	35	34	39	40	38	37	127
Wales	-	-	-	-	13	11	13	21	19	15	17	37	29	24	18	19	37	35	29	16	36	37	36	56
UK	12	-	-	-	20	15	16	203	23	23	20	341	29	26	28	245	33	35	37	152	46	36	38	620

B: Percentage Bedroom Occupancy

England	16	-	-	-	27	21	23	97	31	32	28	215	37	36	37	154	44	42	49	85	60	51	52	390
Northern Ireland	-	-	-	-	17	14	7	33	28	28	14	29	46	29	28	26	41	39	35	12	54	49	47	47
Scotland	11	-	-	-	44	26	30	52	37	36	37	60	43	40	39	46	46	44	42	39	50	50	48	127
Wales	-	-	-	-	16	14	17	21	27	21	23	37	38	32	28	19	48	45	41	16	51	48	50	56
UK	15	-	-	-	28	21	23	203	31	32	29	341	38	36	36	245	44	42	47	152	58	51	51	620

- 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 2009 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. (a) 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.
(b) The weighting figures for Northern Ireland and Scotland have been updated for 2009 with the 2008 data being used for England and the 2007 data for Wales.
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 (Tables 2 and 4) or figures relating to arrivals for Wales.
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 December 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 2009) 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)