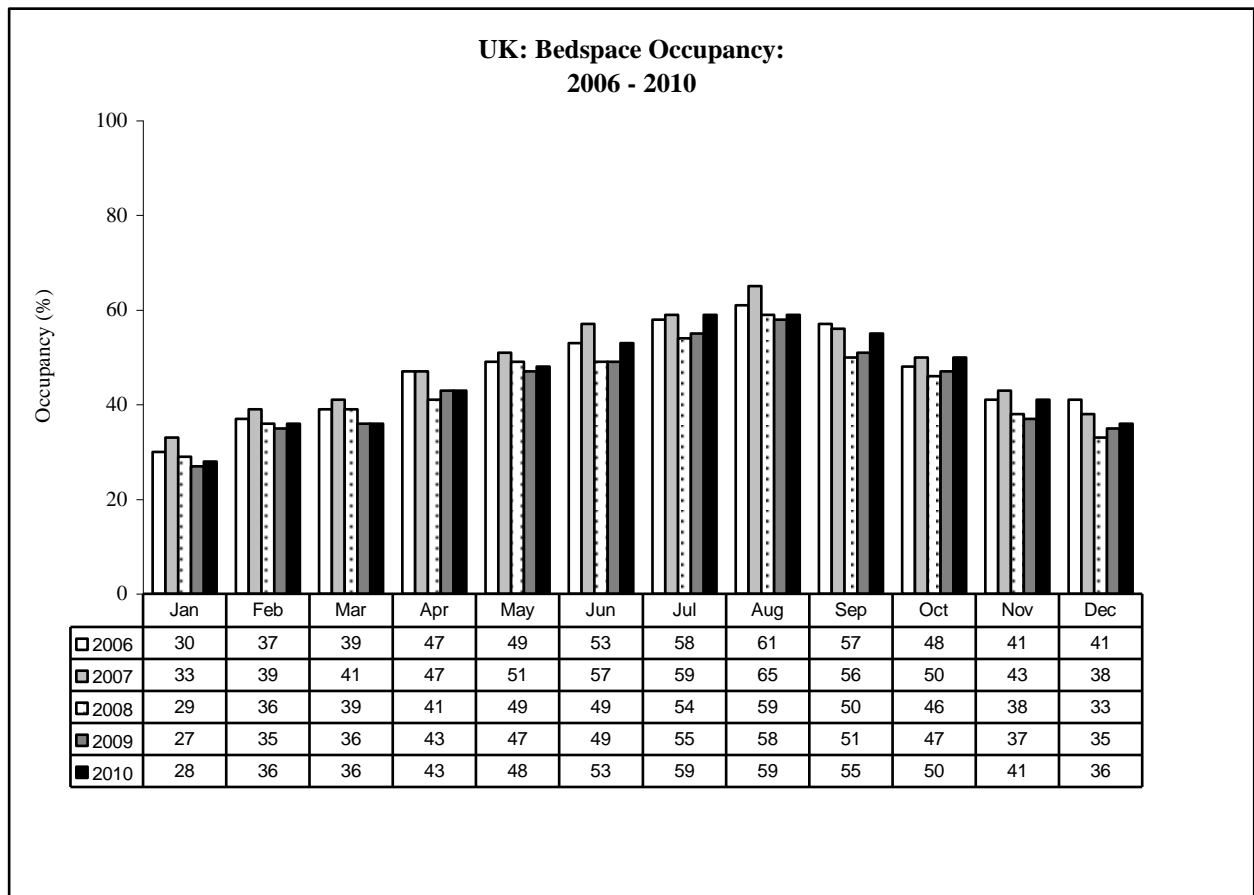


UK OCCUPANCY SURVEY FOR SERVICED ACCOMMODATION

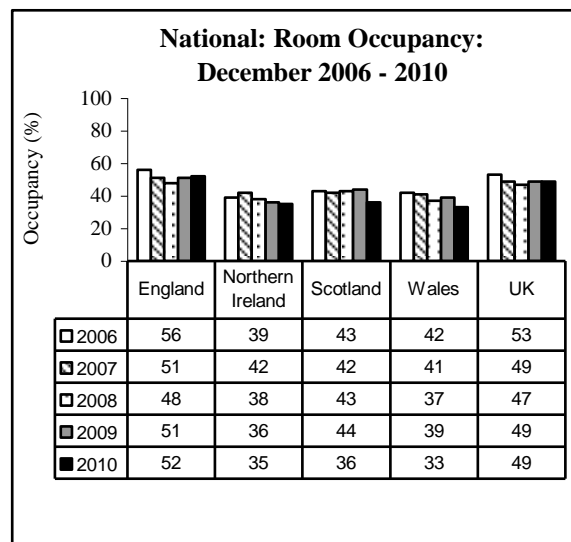
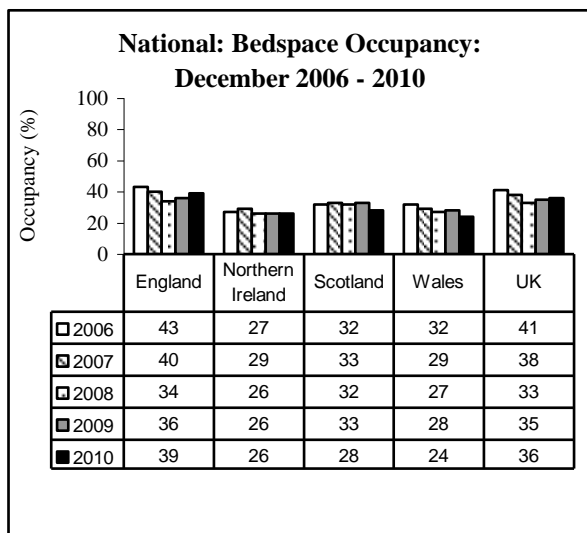
Commissioned by the National Tourist Boards of England, Northern Ireland and Scotland and by Visit Wales (part of the Welsh Assembly Government) and supported by the Department for Culture, Media and Sport

Co-ordinated by TNS Travel and Tourism

DECEMBER 2010



- 2139 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 2010 was 36%, one percentage point higher than in December 2009. At 49%, room occupancy was the same as in December 2009.



- Bedspace occupancy varied from 39% in England to 24% in Wales, while room occupancy varied from 52% in England to 33% in Wales.
- When compared with December 2009, occupancy levels rose in England. In Northern Ireland, bedspace occupancy remained at its 2009 level but room occupancy fell by 1 percentage point. In Scotland and Wales (where for much of the month extreme wintry conditions made travel difficult) occupancy levels fell – by up to 8 percentage points (room occupancy, Scotland).
- When compared with four years earlier, occupancy levels throughout the UK had fallen, with the greatest falls (of 8 and 9 percentage points) being in Wales.
- Bedspace occupancy by non-UK residents rose in Northern Ireland when compared with December 2009 and remained unchanged in England and Wales (comparable figures for Scotland are no longer collected – (see notes 5a (sample sizes) and 5b (changes in data collected) page 7)).

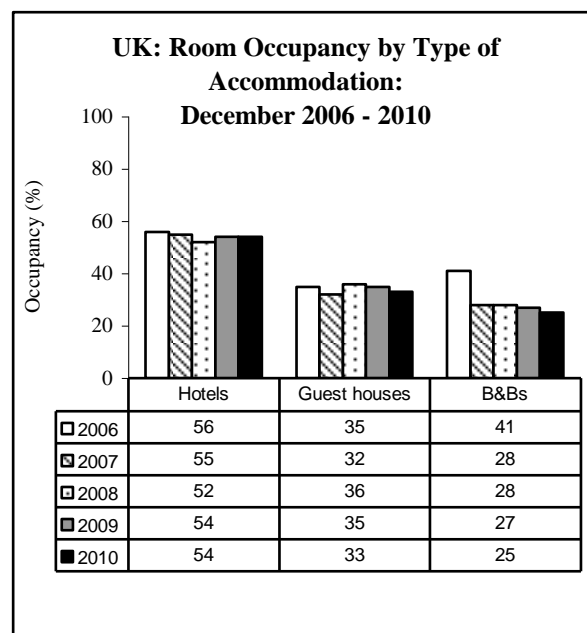
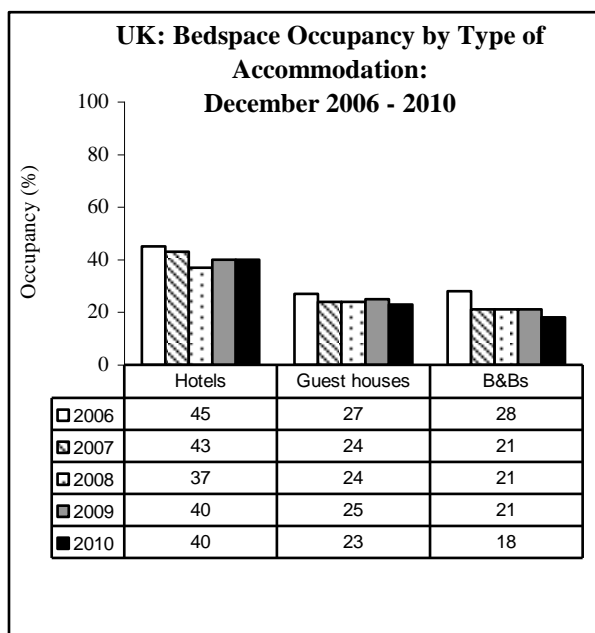
Table 1: Occupancy Levels: December 2008 – 2010

	Bedspace occupancy %			Room occupancy %			Sample size		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
England	34	36	39	48	51	52	953	1051	1536
Northern Ireland	26	26	26	38	36	35	190	154	142
Scotland	32	33	28	43	44	36	310	326	318
Wales	27	28	24	37	39	33	172	161	143
UK	33	35	36	47	49	49	1625	1692	2139

Table 2: UK/Non-UK Occupancy Levels: December 2008 – 2010 (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		
	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010
England	27	27	25	3	4	4	7	9	9	11	13	15	953	1051	1536
Northern Ireland	19	17	17	8	9	10	30	32	30	29	35	36	190	154	142
Scotland	**	**	**	**	**	**	**	**	**	**	**	**	310	326	318
Wales	23	22	19	1	1	1	**	**	**	4	4	7	172	161	143
UK	27	26	24	3	4	4	7	9	9	11	13	15	1625	1692	2139

** figures not available



- Occupancy levels in hotels remained unchanged when compared with December 2009 while those in guest houses and bed and breakfast establishments fell (by 2 or 3 percentage points) (see Table 3).
- When compared with December 2009, only the largest size category (those establishments with more than 100 letting bedrooms) saw a rise in occupancy levels (of 5 percentage points for bedspace occupancy and 2 for room occupancy). Occupancy levels in the remaining five size categories fell, with the greatest fall being in establishments with 26-50 letting bedrooms where both room and bedspace occupancy fell by 6 percentage points (see Table 5).
- When compared with December 2009, bedspace occupancy rose in city/large town and country/village locations with room occupancy remaining unchanged in the former and falling slightly in the latter. In seaside and small town locations both measures of occupancy fell (by up to 3 percentage points) (see Table 6).
- Only the most expensive establishments (those with a maximum tariff of more than £60.00) showed an increase in both measures of occupancy when compared with December 2009. Room occupancy rose slightly in the £20.00-£29.99 tariff band (where bedspace occupancy falling by a similar amount). In the £30.00-£39.99 tariff band bedspace occupancy remained as in December 2009 while room occupancy fell (by 2 percentage points). The remaining tariff bands (those with maximum tariffs of £40.00-£49.99 and £50.00-£59.99) saw comparatively large falls (of between 7 and 11 percentage points) in occupancy levels (see Table 7 and note 5a, page 7 (sample sizes)).

Table 3: Occupancy Levels by Type of Establishment: December 2008 – 2010

a: Hotels									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
England	37	41	42	53	55	57	309	361	918
Northern Ireland	32	31	30	46	44	40	72	71	72
Scotland	36	37	32	47	49	41	218	228	222
Wales	33	34	30	45	47	40	94	91	82
UK	37	40	40	52	54	54	693	751	1294
b: Guest Houses									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
England	26	26	25	38	37	35	234	252	240
Northern Ireland	12	16	14	19	21	18	19	18	13
Scotland	20	19	18	29	27	26	45	47	46
Wales	17	19	13	23	27	18	32	31	27
UK	24	25	23	36	35	33	330	348	326
c: Bed & Breakfast Establishments									
	Bedspace occupancy %			Room occupancy %			<i>Sample size</i>		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
England	22	23	19	30	30	27	405	433	378
Northern Ireland	10	8	12	15	11	20	99	65	55
Scotland	16	13	11	23	18	15	47	51	50
Wales	13	12	13	17	16	18	46	39	34
UK	21	21	18	28	27	25	597	588	517

Table 4: Weekend (Fri, Sat and Sun nights) and Weekday Occupancy Levels and Non-UK Percentages: December 2008 – 2010 (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		
	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010	2008	2009	2010
England	31	34	36	37	40	43	49	51	52	47	50	52	7	10	10	6	8	7	11	13	17	10	12	12
Northern Ireland	31	32	29	22	26	21	40	42	37	34	39	31	31	32	29	33	34	31	29	36	39	31	41	39
Scotland	35	35	33	31	32	25	40	41	38	44	45	35	**	**	**	**	**	**	**	**	**	**	**	**
Wales	29	29	28	26	26	20	36	37	35	38	39	30	**	**	**	**	**	**	3	3	6	5	5	8
UK	31	34	35	35	38	39	47	49	49	46	48	48	7	10	10	7	9	8	11	13	17	10	12	12

** figures not available

Table 5: Occupancy Levels by Size: December 2008 – 2010

a: Percentage Bedspace Occupancy																								
	1 – 3 rooms				4 – 10 rooms				11 – 25 rooms				26 – 50 rooms				51 – 100 rooms				>100 rooms			
	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010
England	18	18	15	261	25	25	22	335	32	34	32	133	36	41	35	81	44	48	44	46	37	37	46	680
Northern Ireland	5	3	6	51	13	16	20	14	23	23	19	27	25	24	25	16	30	29	25	22	41	36	41	12
Scotland	14	12	9	44	21	20	21	67	29	32	29	58	35	35	29	55	45	46	40	42	46	47	41	51
Wales	12	10	12	30	19	19	15	41	28	30	26	28	34	36	33	22	36	35	36	14	42	46	32	8
UK	17	17	14	386	24	24	21	457	31	33	31	246	36	40	34	174	43	47	43	124	38	39	44	751
B: Percentage Bedroom Occupancy																								
England	25	24	21	261	33	33	29	335	43	44	44	133	46	54	48	81	58	57	58	46	60	58	63	680
Northern Ireland	8	4	10	51	22	19	27	14	35	32	29	27	35	33	33	16	45	41	37	22	57	52	48	12
Scotland	21	16	12	44	30	30	27	67	38	42	37	58	45	44	37	55	55	56	48	42	57	62	53	51
Wales	16	14	16	30	25	26	21	41	40	40	36	28	47	47	44	22	51	52	51	14	55	60	40	8
UK	24	22	19	386	32	32	28	457	42	43	42	246	46	52	46	174	57	56	56	124	59	58	60	751

Table 6: Occupancy Levels by Location: December 2008 – 2010**A: Percentage Bedspace Occupancy**

	Seaside				City/large town				Small town				Country/village			
	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010
England	31	30	28	208	40	44	49	558	30	33	33	359	27	27	29	411
Northern Ireland	19	16	17	30	32	31	32	59	27	26	23	16	15	19	16	37
Scotland	28	24	21	39	41	40	36	113	28	27	20	73	25	28	24	93
Wales	31	29	29	35	44	45	33	19	21	24	21	20	22	21	19	69
UK	30	29	27	312	40	43	46	749	29	32	30	468	26	27	28	610

B: Percentage Bedroom Occupancy

England	41	40	37	208	59	62	64	558	42	46	47	359	36	39	40	411
Northern Ireland	26	27	23	30	46	43	42	59	41	36	34	16	22	25	21	37
Scotland	36	31	27	39	53	53	48	113	39	37	26	73	33	36	29	93
Wales	41	39	38	35	55	60	44	19	31	36	31	20	29	28	25	69
UK	40	39	36	312	58	60	60	749	41	44	43	468	35	38	37	610

Table 7: Occupancy Levels by Tariff (maximum charge for one person for bed and breakfast): December 2008 – 2010 (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			
	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010	2008	2009	2010	Sample size 2010
England	-	-	-	-	15	16	15	60	23	19	20	209	26	29	21	161	35	38	27	88	36	38	42	998
Northern Ireland	-	-	-	-	9	5	14	26	19	10	11	29	18	20	19	22	29	25	24	14	34	33	32	51
Scotland	-	-	-	-	18	20	14	46	24	27	23	57	29	28	24	46	35	34	30	33	38	37	33	132
Wales	-	-	-	-	11	13	20	9	15	16	14	43	24	20	16	19	35	29	25	16	37	36	31	56
UK	10	-	-	-	15	16	15	141	23	20	20	338	26	28	21	248	35	37	27	151	36	38	40	1237

B: Percentage Bedroom Occupancy

England	-	-	-	-	21	23	24	60	32	28	27	209	36	37	28	161	42	49	36	88	51	52	56	998
Northern Ireland	-	-	-	-	14	7	22	26	28	13	17	29	29	28	29	22	39	34	29	14	49	47	42	51
Scotland	-	-	-	-	26	30	21	46	36	37	33	57	40	39	33	46	44	42	37	33	50	48	40	132
Wales	-	-	-	-	14	17	30	9	21	23	20	43	32	31	18	19	45	40	35	16	48	50	42	56
UK	14	-	-	-	21	23	24	141	32	29	27	338	36	37	28	248	42	47	36	151	51	51	53	1237

- 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 2010 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 2010 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 or figures relating to arrivals for Wales (Tables 2 and 4).
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 2010) 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)