

England Occupancy Survey - December 2016

SUMMARY OF RESULTS

- **Room occupancy** in December increased by +3% to 63%, with **bedspace occupancy** increasing by +3% when compared to December 2015 to 47%.
- Looking at the **whole of 2016**, room occupancy increased by 1% to 71% whilst bedspace occupancy remained unchanged at 52%.
- **Weekday** room occupancy increased 2% to 63% whilst **weekend** room occupancy increased by +4% to 63%. For bedspace occupancy, weekday occupancy increased by +2% to 43% whilst weekend occupancy increased by +5% to 52%.
- **Seaside** was unchanged at 49% for room occupancy and decreased by -2% to 32% for bedspace occupancy. **City/large towns** room occupancy increased +3% to 73%, with bedspace increasing to 54%. **Small town** room occupancy increased by +3% to 59% and increased by 1% to 40% for bedspace occupancy, with **countryside** occupancy down by -1% for room to 47% while bedspace occupancy increased by +2% to 37%.
- Looking at occupancy by **establishment type**, hotel occupancy increased +3% for room to 66% and by +2% for bed to 48%, with guesthouse showing a +6% increase for room and +10% for bedspace occupancy to 47% and 40% respectively. B&Bs saw occupancy increase by 1% for room to 38% and increased by +4% for bed to 31%.
- Looking at room occupancy rates by **number of rooms**, all categories varied by 3% or less except 1-3 rooms which decreased by -4% and 100+ rooms which increased by +4%. For bedspace occupancy, only the 11-25 rooms (+11%), the 51-100 rooms (-5%) and the 100+ rooms (+3%) saw a change of more than 2%.

Room and Bedspace Occupancy (including STR Global data)

| | Room Occupancy | | | Bedspace Occupancy | | |
|--------------------|----------------|------|-------|--------------------|------|-------|
| | 2015 | 2016 | % +/- | 2015 | 2016 | % +/- |
| December | 60% | 63% | +3% | 44% | 47% | +3% |
| Dec (Year to Date) | 70% | 71% | +1% | 52% | 52% | 0% |
| Past 12 months | 70% | 71% | +1% | 52% | 52% | 0% |

Room and Bedspace Occupancy (excluding STR Global data)

| | Room Occupancy | | | Bedspace Occupancy | | |
|--------------------|----------------|------|-------|--------------------|------|-------|
| | 2015 | 2016 | % +/- | 2015 | 2016 | % +/- |
| December | 52% | 53% | +1% | 35% | 37% | +2% |
| Dec (Year to Date) | 63% | 64% | +1% | 47% | 47% | 0% |
| Past 12 months | 63% | 64% | +1% | 47% | 47% | 0% |

Weekday/Weekend

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2013 | 2014 | 2015 | 2016 | 2013 | 2014 | 2015 | 2016 |
| December | | | | | | | | |
| Weekday | 60% | 62% | 61% | 63% | 41% | 42% | 41% | 43% |
| Weekend | 55% | 60% | 59% | 63% | 45% | 49% | 47% | 52% |
| Dec (Year to Date) | | | | | | | | |
| Weekday | 70% | 71% | 72% | 73% | 48% | 49% | 49% | 50% |
| Weekend | 65% | 66% | 67% | 68% | 54% | 54% | 55% | 55% |
| Past 12 months | | | | | | | | |
| Weekday | 70% | 71% | 72% | 73% | 48% | 49% | 49% | 50% |
| Weekend | 65% | 66% | 67% | 68% | 54% | 54% | 55% | 55% |

Location Type

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2013 | 2014 | 2015 | 2016 | 2013 | 2014 | 2015 | 2016 |
| December | | | | | | | | |
| Seaside | 46% | 47% | 49% | 49% | 31% | 39% | 34% | 32% |
| City/large town | 69% | 72% | 70% | 73% | 52% | 53% | 51% | 54% |
| Small town | 54% | 56% | 56% | 59% | 37% | 39% | 39% | 40% |
| Countryside | 48% | 46% | 48% | 47% | 36% | 35% | 35% | 37% |
| Dec (Year to Date) | | | | | | | | |
| Seaside | 60% | 61% | 60% | 63% | 50% | 47% | 46% | 47% |
| City/large town | 77% | 78% | 71% | 77% | 57% | 57% | 53% | 56% |
| Small town | 65% | 65% | 63% | 68% | 45% | 46% | 45% | 47% |
| Countryside | 59% | 58% | 59% | 61% | 46% | 45% | 46% | 48% |
| Past 12 months | | | | | | | | |
| Seaside | 60% | 61% | 60% | 63% | 50% | 47% | 46% | 47% |
| City/large town | 77% | 78% | 71% | 77% | 57% | 57% | 53% | 56% |
| Small town | 65% | 65% | 63% | 68% | 45% | 46% | 45% | 47% |
| Countryside | 59% | 58% | 59% | 61% | 46% | 45% | 46% | 48% |



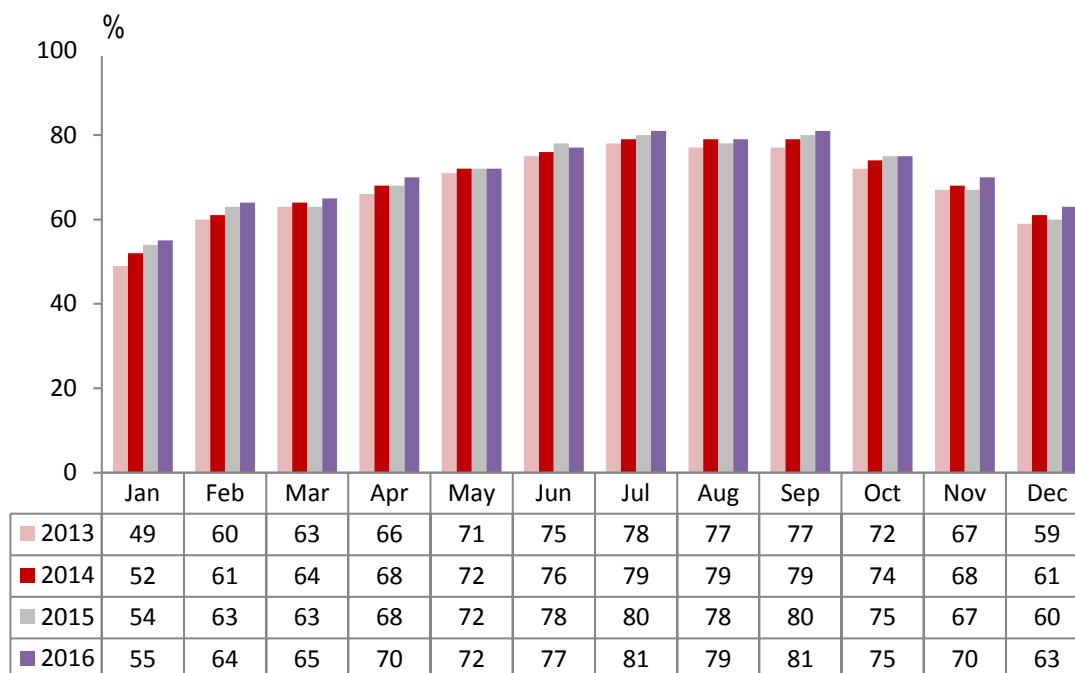
Establishment Type

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2013 | 2014 | 2015 | 2016 | 2013 | 2014 | 2015 | 2016 |
| December | | | | | | | | |
| Hotel | 62% | 65% | 63% | 66% | 46% | 48% | 46% | 48% |
| Guesthouse | 40% | 40% | 41% | 47% | 29% | 29% | 30% | 40% |
| B&B | 35% | 37% | 37% | 38% | 25% | 29% | 27% | 31% |
| Dec (Year to Date) | | | | | | | | |
| Hotel | 72% | 73% | 73% | 73% | 54% | 54% | 53% | 53% |
| Guesthouse | 54% | 55% | 55% | 57% | 42% | 43% | 43% | 46% |
| B&B | 49% | 51% | 53% | 54% | 38% | 40% | 42% | 44% |
| Past 12 months | | | | | | | | |
| Hotel | 72% | 73% | 73% | 73% | 54% | 54% | 53% | 53% |
| Guesthouse | 54% | 55% | 55% | 57% | 42% | 43% | 43% | 46% |
| B&B | 49% | 51% | 53% | 54% | 38% | 40% | 42% | 44% |

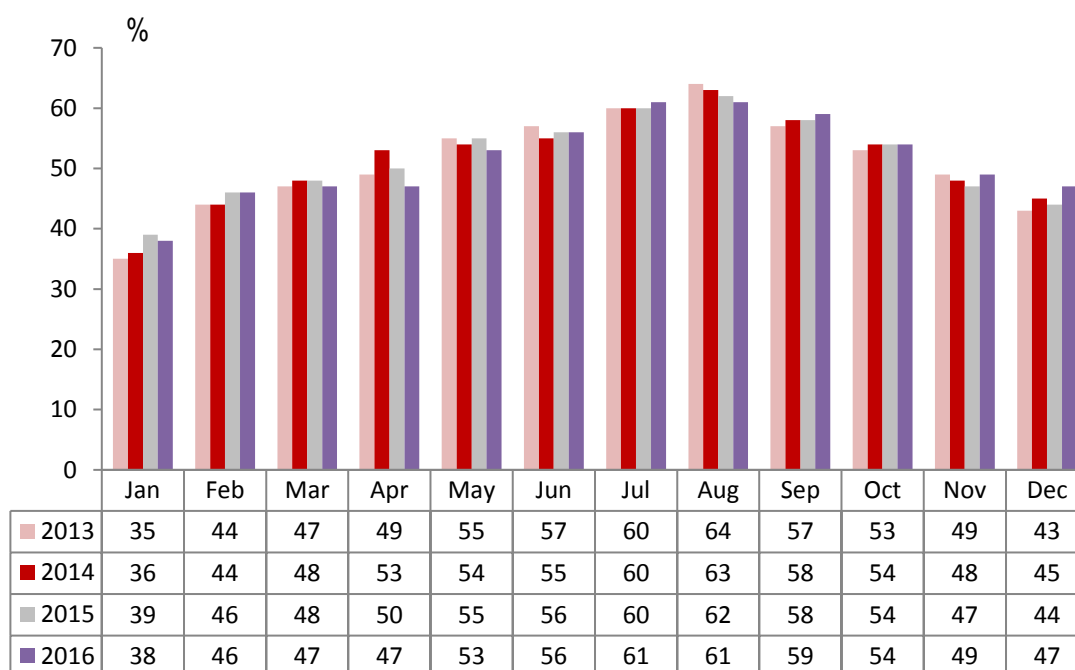
Number of rooms

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2013 | 2014 | 2015 | 2016 | 2013 | 2014 | 2015 | 2016 |
| December | | | | | | | | |
| 1-3 rooms | 25% | 29% | 30% | 26% | 19% | 21% | 22% | 20% |
| 4-10 rooms | 34% | 36% | 39% | 37% | 25% | 26% | 26% | 26% |
| 11-25 rooms | 51% | 52% | 50% | 53% | 35% | 38% | 33% | 45% |
| 26-50 rooms | 58% | 58% | 57% | 60% | 44% | 44% | 44% | 44% |
| 51-100 rooms | 56% | 57% | 54% | 53% | 45% | 45% | 38% | 33% |
| 100+ rooms | 68% | 71% | 69% | 73% | 48% | 50% | 50% | 53% |
| Dec (Year to Date) | | | | | | | | |
| 1-3 rooms | 41% | 43% | 45% | 44% | 33% | 35% | 35% | 35% |
| 4-10 rooms | 50% | 51% | 53% | 54% | 39% | 40% | 42% | 43% |
| 11-25 rooms | 59% | 61% | 62% | 62% | 44% | 46% | 47% | 49% |
| 26-50 rooms | 69% | 69% | 68% | 68% | 54% | 53% | 53% | 51% |
| 51-100 rooms | 69% | 66% | 68% | 68% | 54% | 53% | 50% | 47% |
| 100+ rooms | 76% | 78% | 78% | 78% | 54% | 55% | 55% | 56% |
| Past 12 months | | | | | | | | |
| 1-3 rooms | 41% | 43% | 45% | 44% | 33% | 35% | 35% | 35% |
| 4-10 rooms | 50% | 51% | 53% | 54% | 39% | 40% | 42% | 43% |
| 11-25 rooms | 59% | 61% | 62% | 62% | 44% | 46% | 47% | 49% |
| 26-50 rooms | 69% | 69% | 68% | 68% | 54% | 53% | 53% | 51% |
| 51-100 rooms | 69% | 66% | 68% | 68% | 54% | 53% | 50% | 47% |
| 100+ rooms | 76% | 78% | 78% | 78% | 54% | 55% | 55% | 56% |

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|-----------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2013 | 2014 | 2015 | 2016 | 2013 | 2014 | 2015 | 2016 |
| Past 12 months | | | | | | | | |
| East Midlands | 65% | 64% | 64% | 66% | 45% | 45% | 46% | 46% |
| Yorkshire | 64% | 67% | 67% | 69% | 48% | 49% | 50% | 52% |
| London | 82% | 82% | 81% | 80% | 64% | 63% | 61% | 61% |
| North West | 61% | 61% | 62% | 64% | 44% | 43% | 45% | 46% |
| East of England | 64% | 67% | 68% | 68% | 48% | 50% | 49% | 49% |
| West Midlands | 65% | 68% | 71% | 71% | 46% | 49% | 50% | 51% |
| South West | 62% | 64% | 66% | 67% | 48% | 49% | 51% | 51% |
| South East | 68% | 70% | 71% | 71% | 51% | 50% | 49% | 48% |
| North East | 58% | 59% | 60% | 64% | 41% | 42% | 42% | 45% |

Notes on the England Occupancy Survey

In June 2010 a change was made to occupancy data - syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.

The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas, business travellers vs. non business travellers).

This data is included in each of the single month analysis, for the year to date and the past 12 months, excluding data prior to June 2010 when STR data was not included. Including this data makes the survey much more robust but may have some impact on trends. To show the impact this has had on the England occupancy data our main dashboard includes data with and without STR Global data.

This report is undertaken by The Research Solution, survey administrators on behalf of Visit England.