

England Occupancy Survey - December 2015

SUMMARY OF RESULTS

- **Room occupancy** in December was down by 1% to 60%, with **bedspace occupancy** also down by 1% compared to December 2014 at 44%.
- **Weekday** room occupancy was also down by 1% at 61% whilst **weekend** room occupancy decreased by 1% to 59%. For bedspace occupancy, weekday and weekend occupancy both decreased, to by 1% to 41% and 2% to 47% respectively.
- **Seaside** in December was up by 2% to 49% for room occupancy and decreased by 5% to 34% for bedspace occupancy. **City/large towns** room occupancy decreased by 2% to 70%, with bedspace occupancy also down 2% to 51%. **Small town** occupancy remained unchanged for room at 56% and also for bed at 39%, with **countryside** occupancy up by 2% for room to 48% and unchanged for bedspace at 35%.
- Looking at occupancy by **establishment type**, B&B's saw occupancy remain unchanged for room and decrease by 2% for bed. Hotel occupancy decreased by 2% to 63% for room and decreased 2% to 46% for bed, with guest house showing an increase for both room and bedspace occupancy of 1% respectively.
- Looking at room occupancy rates by **number of rooms**, all categories varied by 2% or less except 4-10 rooms which increased by 3% and 51-100 rooms which decreased by 3%. For bedspace occupancy, only the 11-25 rooms and 51-100 rooms categories saw a change of more than 2%, with a decrease of 5% and 7% respectively. All other categories remained fairly unchanged.
- Looking at **occupancy by region**, the largest shift came from the East Midlands and London with a decrease of 4%. All other regions remained fairly unchanged, with a 2% variation or less. For bedspace occupancy the South East saw the biggest movement, with a 5% decrease to 39%, whilst all other regions changed by 3% or less.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
December	61%	60%	-1%	45%	44%	-1%
Jan-Dec	69%	70%	+1%	52%	52%	0%
Past 12 months	69%	70%	+1%	52%	52%	0%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
December	51%	52%	+1%	38%	35%	-3%
Jan-Dec	62%	63%	+1%	47%	47%	0%
Past 12 months	62%	63%	+1%	47%	47%	0%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
December								
Weekday	57%	60%	62%	61%	39%	41%	42%	41%
Weekend	53%	55%	60%	59%	44%	45%	49%	47%
Jan-Dec								
Weekday	67%	70%	71%	72%	46%	48%	49%	49%
Weekend	63%	65%	66%	67%	52%	54%	54%	55%
Past 12 months								
Weekday	67%	70%	71%	72%	46%	48%	49%	49%
Weekend	63%	65%	66%	67%	52%	54%	54%	55%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
December								
Seaside	43%	46%	47%	49%	33%	31%	39%	34%
City/large town	64%	69%	72%	70%	50%	52%	53%	51%
Small town	51%	54%	56%	56%	35%	37%	39%	39%
Countryside	45%	48%	46%	48%	34%	36%	35%	35%
Jan-Dec								
Seaside	57%	60%	61%	60%	45%	50%	47%	46%
City/large town	73%	77%	78%	71%	55%	57%	57%	53%
Small town	63%	65%	65%	63%	44%	45%	46%	45%
Countryside	55%	59%	58%	59%	44%	46%	45%	46%
Past 12 months								
Seaside	57%	60%	61%	60%	45%	50%	47%	46%
City/large town	73%	77%	78%	71%	55%	57%	57%	53%
Small town	63%	65%	65%	63%	44%	45%	46%	45%
Countryside	55%	59%	58%	59%	44%	46%	45%	46%

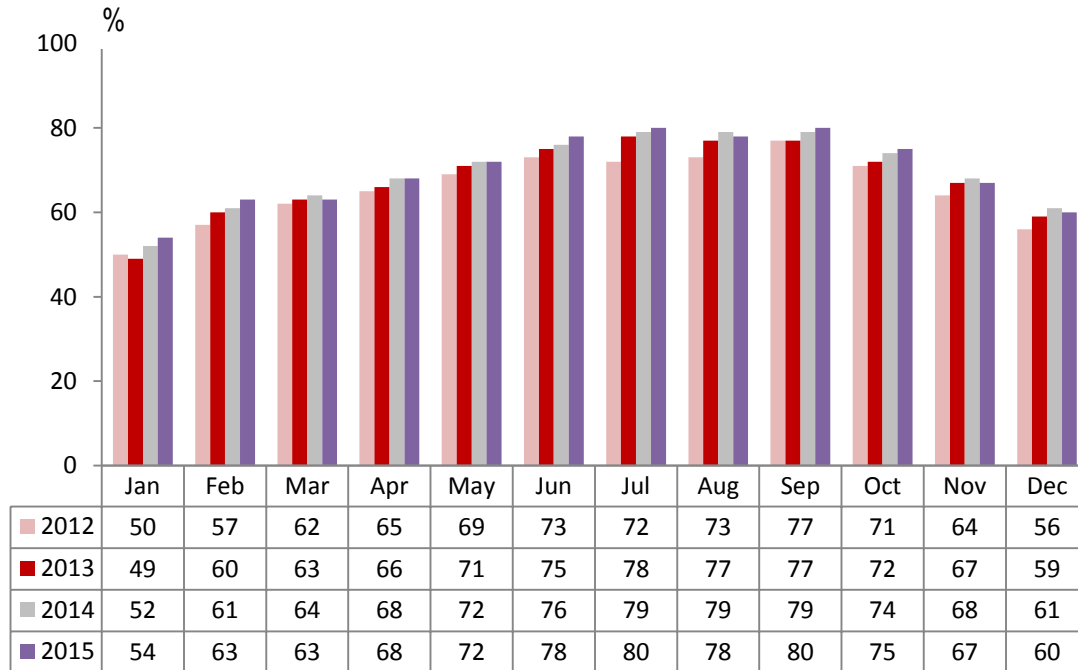
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
December								
Hotel	59%	62%	65%	63%	45%	46%	48%	46%
Guesthouse	42%	40%	40%	41%	33%	29%	29%	30%
B&B	32%	35%	37%	37%	23%	25%	29%	27%
Jan-Dec								
Hotel	69%	72%	73%	73%	52%	54%	54%	53%
Guesthouse	54%	54%	55%	55%	43%	42%	43%	43%
B&B	48%	49%	51%	53%	38%	38%	40%	42%
Past 12 months								
Hotel	69%	72%	73%	73%	52%	54%	54%	53%
Guesthouse	54%	54%	55%	55%	43%	42%	43%	43%
B&B	48%	49%	51%	53%	38%	38%	40%	42%

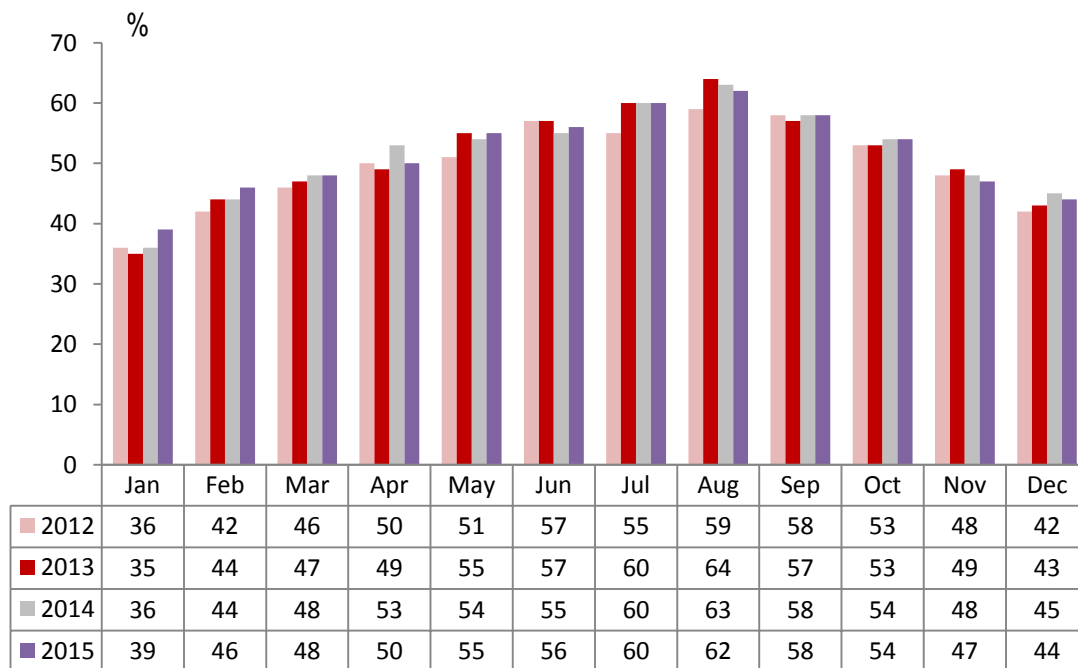
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
December								
1-3 rooms	24%	25%	29%	30%	19%	19%	21%	22%
4-10 rooms	32%	34%	36%	39%	24%	25%	26%	26%
11-25 rooms	45%	51%	52%	50%	32%	35%	38%	33%
26-50 rooms	54%	58%	58%	57%	41%	44%	44%	44%
51-100 rooms	59%	56%	57%	54%	47%	45%	45%	38%
100+ rooms	65%	68%	71%	69%	47%	48%	50%	50%
Jan-Dec								
1-3 rooms	40%	41%	43%	45%	33%	33%	35%	35%
4-10 rooms	48%	50%	51%	53%	38%	39%	40%	42%
11-25 rooms	56%	59%	61%	62%	43%	44%	46%	47%
26-50 rooms	65%	69%	69%	68%	50%	54%	53%	53%
51-100 rooms	70%	69%	66%	68%	55%	54%	53%	50%
100+ rooms	74%	76%	78%	78%	52%	54%	55%	55%
Past 12 months								
1-3 rooms	40%	41%	43%	45%	33%	33%	35%	35%
4-10 rooms	48%	50%	51%	53%	38%	39%	40%	42%
11-25 rooms	56%	59%	61%	62%	43%	44%	46%	47%
26-50 rooms	65%	69%	69%	68%	50%	54%	53%	53%
51-100 rooms	70%	69%	66%	68%	55%	54%	53%	50%
100+ rooms	74%	76%	78%	78%	53%	54%	55%	55%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
December								
East Midlands	53%	56%	56%	52%	35%	39%	39%	36%
Yorkshire	52%	55%	57%	59%	38%	40%	41%	44%
London	74%	76%	78%	74%	58%	59%	59%	56%
North West	52%	54%	56%	55%	38%	39%	40%	40%
East of England	52%	57%	59%	59%	40%	42%	43%	43%
West Midlands	52%	54%	59%	61%	37%	38%	41%	43%
South West	45%	47%	51%	53%	34%	35%	39%	38%
South East	52%	56%	59%	58%	39%	38%	44%	39%
North East	39%	42%	51%	50%	28%	28%	35%	34%
Jan-Dec								
East Midlands	63%	65%	64%	64%	43%	45%	45%	46%
Yorkshire	60%	64%	67%	67%	45%	48%	49%	50%
London	80%	82%	82%	81%	62%	64%	63%	61%
North West	58%	61%	61%	62%	42%	44%	43%	45%
East of England	61%	64%	67%	68%	47%	48%	50%	49%
West Midlands	63%	65%	68%	71%	45%	46%	49%	50%
South West	60%	62%	64%	66%	47%	48%	49%	51%
South East	65%	68%	70%	71%	48%	51%	50%	49%
North East	56%	58%	59%	60%	41%	41%	42%	42%
Past 12 months								
East Midlands	63%	65%	64%	64%	43%	45%	45%	46%
Yorkshire	60%	64%	67%	67%	45%	48%	49%	50%
London	80%	82%	82%	81%	62%	64%	63%	61%
North West	58%	61%	61%	62%	42%	44%	43%	45%
East of England	61%	64%	67%	68%	47%	48%	50%	49%
West Midlands	63%	65%	68%	71%	45%	46%	49%	50%
South West	60%	62%	64%	66%	47%	48%	49%	51%
South East	65%	68%	70%	71%	48%	51%	50%	49%
North East	56%	58%	59%	60%	41%	41%	42%	42%

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.