

England Occupancy Survey - March 2016

SUMMARY OF RESULTS

- **Room occupancy** in March was up by 2% to 65% with **bedspace occupancy** down by 1% compared to March 2015 at 47%.
- **Weekday** room occupancy was down by 3% at 66% whilst **weekend** room occupancy increased by 4% to 63%. For bedspace occupancy, weekday occupancy decreased by 2% and weekend occupancy increased by 4% to 52%.
- **Seaside** was up by 9% to 51% for room occupancy and decreased by 1% to 38% for bedspace occupancy. **City/large towns** room occupancy decreased by 1% to 73%, with bedspace occupancy down 2% to 51%. **Small town** room and bed occupancy increased by 2% to 64% and 44% respectively, with **countryside** occupancy up by 1% for room to 54% while bedspace occupancy increased by 3% to 42%.
- Looking at occupancy by **establishment type**, B&B's saw occupancy increase for room by 4% and by 5% for bed. Hotel occupancy increased to 68% for room and decreased by 2% to 49% for bed, with guest house unchanged for room (44%) and increased by 2% for bedspace occupancy at 34%.
- Looking at room occupancy rates by **number of rooms**, all categories varied by 2% or less except 1-3 rooms & 4-10 rooms which increased by 3%. For bedspace occupancy, only the 51-100 rooms categories saw a change of more than 3%, with a decrease of 10%. All other categories remained fairly unchanged.
- Looking at **occupancy by region**, the largest shift came from the South East with an increase of 6%. The East Midlands decreased by 5%. All other regions remained fairly unchanged, with a 3% variation or less. For bedspace occupancy the South East saw the biggest movement, with a 8% decrease to 43%. Yorkshire increased by 4% whilst all other regions changed by 3% or less.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2015	2016	% +/-	2015	2016	% +/-
March	63%	65%	+2%	48%	47%	-1%
Mar (Year to Date)	60%	61%	+1%	44%	44%	0%
Past 12 months	70%	70%	0%	52%	51%	-1%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2015	2016	% +/-	2015	2016	% +/-
March	53%	57%	+4%	43%	41%	-2%
Mar (Year to Date)	51%	53%	+2%	37%	36%	-1%
Past 12 months	63%	64%	+1%	48%	47%	-1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
March								
Weekday	65%	68%	69%	66%	44%	50%	46%	44%
Weekend	60%	58%	59%	63%	50%	44%	48%	52%
Mar (Year to Date)								
Weekday	60%	63%	65%	65%	40%	43%	43%	42%
Weekend	53%	53%	54%	57%	44%	42%	45%	46%
Past 12 months								
Weekday	68%	70%	72%	72%	47%	49%	49%	49%
Weekend	63%	65%	67%	67%	53%	53%	54%	55%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
March								
Seaside	50%	49%	42%	51%	39%	37%	39%	38%
City/large town	71%	73%	74%	73%	54%	57%	53%	51%
Small town	60%	59%	62%	64%	43%	41%	42%	44%
Countryside	52%	48%	53%	54%	40%	36%	39%	42%
Mar (Year to Date)								
Seaside	43%	44%	45%	48%	31%	30%	38%	34%
City/large town	65%	68%	70%	69%	49%	50%	51%	49%
Small town	54%	55%	57%	59%	37%	38%	39%	40%
Countryside	46%	45%	48%	47%	34%	33%	34%	34%
Past 12 months								
Seaside	58%	59%	61%	63%	45%	44%	49%	47%
City/large town	73%	77%	78%	77%	55%	57%	57%	56%
Small town	63%	64%	65%	67%	44%	45%	46%	48%
Countryside	56%	59%	59%	60%	45%	46%	46%	46%

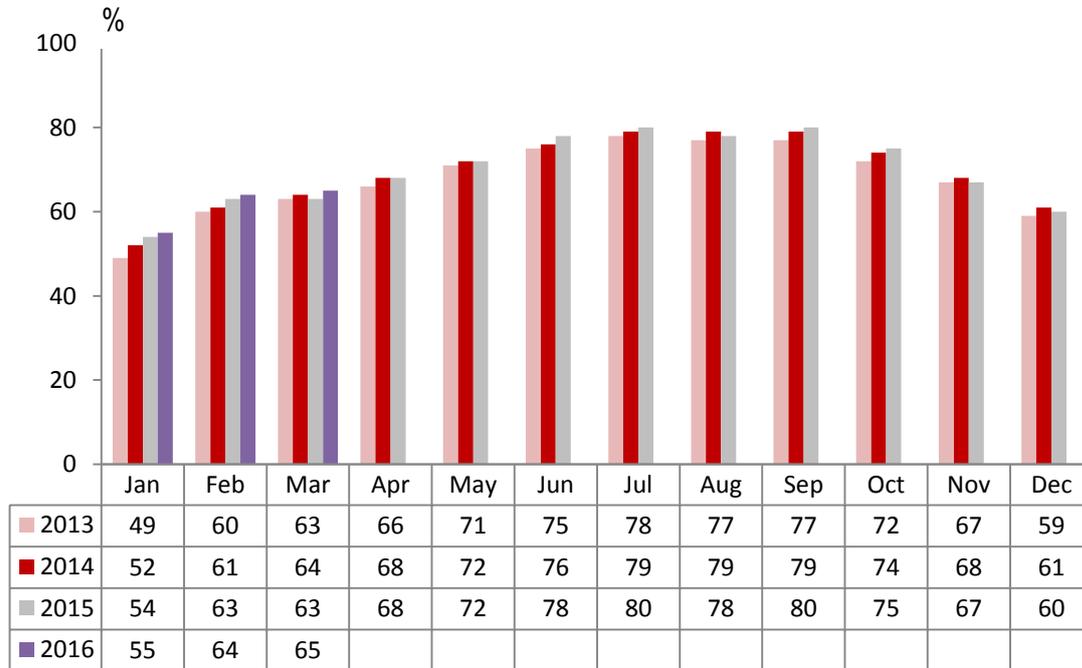
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
March								
Hotel	68%	68%	67%	68%	51%	51%	51%	49%
Guesthouse	45%	45%	44%	44%	34%	33%	32%	34%
B&B	41%	38%	43%	47%	30%	28%	32%	37%
Mar(Year to Date)								
Hotel	62%	63%	64%	64%	45%	46%	47%	46%
Guesthouse	40%	39%	41%	41%	30%	28%	29%	31%
B&B	35%	34%	38%	41%	24%	24%	28%	31%
Past 12 months								
Hotel	70%	71%	73%	73%	52%	53%	54%	53%
Guesthouse	55%	54%	56%	56%	44%	42%	43%	44%
B&B	49%	49%	52%	54%	38%	38%	41%	43%

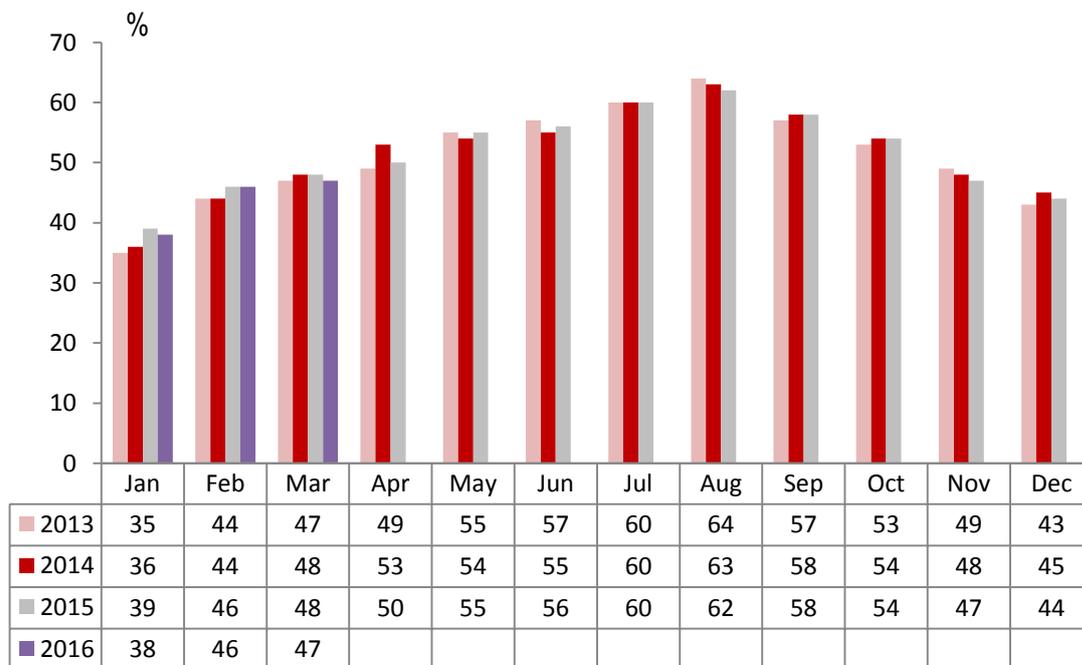
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
March								
1-3 rooms	33%	29%	33%	36%	25%	21%	24%	27%
4-10 rooms	39%	38%	42%	45%	30%	27%	30%	33%
11-25 rooms	49%	53%	55%	53%	36%	38%	39%	39%
26-50 rooms	65%	64%	62%	62%	49%	48%	49%	47%
51-100 rooms	70%	60%	67%	65%	58%	56%	54%	44%
100+ rooms	73%	75%	75%	74%	51%	53%	52%	52%
Mar(Year to Date)								
1-3 rooms	26%	26%	29%	29%	19%	19%	21%	21%
4-10 rooms	33%	33%	37%	40%	24%	23%	27%	28%
11-25 rooms	44%	48%	49%	49%	31%	33%	35%	34%
26-50 rooms	58%	58%	57%	58%	43%	42%	43%	43%
51-100 rooms	62%	56%	60%	58%	48%	43%	46%	39%
100+ rooms	68%	70%	71%	70%	47%	49%	50%	49%
Past 12 months								
1-3 rooms	40%	41%	44%	45%	33%	33%	35%	36%
4-10 rooms	48%	50%	52%	54%	38%	39%	41%	43%
11-25 rooms	56%	59%	62%	62%	43%	45%	46%	47%
26-50 rooms	66%	69%	68%	68%	51%	54%	53%	53%
51-100 rooms	70%	66%	68%	68%	56%	53%	53%	49%
100+ rooms	74%	76%	78%	77%	53%	54%	55%	55%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
March								
East Midlands	61%	57%	57%	62%	45%	43%	41%	43%
Yorkshire	60%	61%	60%	63%	44%	45%	42%	46%
London	80%	80%	77%	75%	62%	62%	57%	56%
North West	57%	57%	59%	59%	41%	40%	41%	42%
East of England	55%	67%	63%	64%	41%	44%	44%	45%
West Midlands	63%	55%	69%	71%	45%	48%	48%	50%
South West	55%	63%	59%	59%	41%	40%	44%	44%
South East	61%	51%	57%	63%	44%	46%	51%	43%
North East	53%	51%	54%	55%	36%	36%	36%	37%
Mar(Year to Date)								
East Midlands	57%	54%	55%	56%	39%	38%	39%	39%
Yorkshire	54%	56%	57%	59%	39%	40%	40%	42%
London	73%	73%	73%	71%	57%	56%	55%	54%
North West	52%	51%	54%	55%	36%	36%	38%	39%
East of England	51%	57%	58%	61%	37%	41%	41%	42%
West Midlands	57%	61%	64%	65%	40%	42%	44%	45%
South West	48%	49%	54%	56%	35%	36%	39%	41%
South East	55%	58%	58%	58%	38%	39%	45%	38%
North East	46%	46%	54%	53%	31%	37%	36%	36%
Past 12 months								
East Midlands	64%	65%	65%	64%	44%	44%	45%	46%
Yorkshire	61%	64%	67%	67%	46%	48%	49%	50%
London	80%	82%	82%	80%	62%	64%	63%	60%
North West	59%	60%	62%	63%	43%	44%	45%	45%
East of England	61%	65%	67%	69%	47%	48%	50%	50%
West Midlands	64%	66%	69%	71%	45%	47%	49%	51%
South West	60%	62%	65%	67%	46%	48%	50%	52%
South East	66%	68%	70%	71%	49%	48%	51%	48%
North East	57%	58%	61%	60%	41%	45%	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.