

## England Occupancy Survey - April 2016

### SUMMARY OF RESULTS

- **Room occupancy** in April was up by 2% to 70% with **bedspace occupancy** down by 3% compared to April 2015 at 47%.
- **Weekday** room occupancy was down by 5% at 73% whilst **weekend** room occupancy increased by 1% to 66%. For bedspace occupancy, weekday occupancy decreased by 5% and weekend occupancy remained unchanged.
- **Seaside** remained unchanged at 61% for room occupancy. **City/large towns** room occupancy increased by 1% to 77%. **Small town** room occupancy increased by 4% to 67%, with **countryside** occupancy up by 2% for room to 54%.
- Looking at occupancy by **establishment type**, B&B's saw occupancy increase for room by 2%. Hotel occupancy increased to 73% for room, with guest house increasing by 1% for room (51%).
- Looking at room occupancy rates by **number of rooms**, all categories varied by 3% or less except 26-50 rooms which increased by 5%.
- Looking at **occupancy by region**, the largest shift came from the East Midlands with an increase of 7%, the North East increased by 6%, whilst the East of England and the West Midlands increased by 4%. All other regions remained fairly unchanged, with a 3% variation or less.
- It is worth noting that **Easter 2016** was in March 2016 whereas Easter 2015 was in April 2015. The weather was unsettled and the second half of April was mainly cold.

#### Room and Bedspace Occupancy (including STR Global data)

|                    | Room Occupancy |            |            | Bedspace Occupancy |            |            |
|--------------------|----------------|------------|------------|--------------------|------------|------------|
|                    | 2015           | 2016       | % +/-      | 2015               | 2016       | % +/-      |
| <b>April</b>       | <b>68%</b>     | <b>70%</b> | <b>+2%</b> | <b>50%</b>         | <b>47%</b> | <b>-3%</b> |
| Apr (Year to Date) | 62%            | 63%        | +1%        | 46%                | 45%        | -1%        |
| 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       | % +/-       |
| <b>April</b>       | <b>61%</b>     | <b>63%</b> | <b>+2%</b> | <b>46%</b>         | <b>36%</b> | <b>-10%</b> |
| Apr (Year to Date) | 53%            | 55%        | +2%        | 39%                | 36%        | -3%         |
| Past 12 months     | 63%            | 64%        | +1%        | 48%                | 46%        | -2%         |

## Weekday/Weekend

|                           | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
|                           | 2013           | 2014 | 2015 | 2016 | 2013               | 2014 | 2015 | 2016 |
| <b>April</b>              |                |      |      |      |                    |      |      |      |
| Weekday                   | 67%            | 69%  | 68%  | 73%  | 46%                | 50%  | 47%  | 42%  |
| Weekend                   | 61%            | 67%  | 65%  | 66%  | 50%                | 56%  | 54%  | 54%  |
| <b>Apr (Year to Date)</b> |                |      |      |      |                    |      |      |      |
| Weekday                   | 62%            | 64%  | 66%  | 67%  | 42%                | 45%  | 44%  | 42%  |
| Weekend                   | 55%            | 57%  | 57%  | 59%  | 45%                | 45%  | 47%  | 48%  |
| <b>Past 12 months</b>     |                |      |      |      |                    |      |      |      |
| Weekday                   | 68%            | 70%  | 72%  | 72%  | 47%                | 49%  | 49%  | 48%  |
| Weekend                   | 63%            | 65%  | 66%  | 67%  | 53%                | 53%  | 54%  | 55%  |

## Location Type

|                           | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
|                           | 2013           | 2014 | 2015 | 2016 | 2013               | 2014 | 2015 | 2016 |
| <b>April</b>              |                |      |      |      |                    |      |      |      |
| Seaside                   | 53%            | 58%  | 61%  | 61%  | 42%                | 47%  | 44%  | 27%  |
| City/large town           | 74%            | 78%  | 76%  | 77%  | 56%                | 59%  | 56%  | 55%  |
| Small town                | 61%            | 64%  | 63%  | 67%  | 42%                | 47%  | 45%  | 47%  |
| Countryside               | 57%            | 58%  | 57%  | 59%  | 44%                | 44%  | 44%  | 45%  |
| <b>Apr (Year to Date)</b> |                |      |      |      |                    |      |      |      |
| Seaside                   | 46%            | 48%  | 49%  | 51%  | 35%                | 34%  | 39%  | 31%  |
| City/large town           | 67%            | 71%  | 72%  | 71%  | 51%                | 53%  | 52%  | 50%  |
| Small town                | 56%            | 57%  | 59%  | 61%  | 38%                | 40%  | 41%  | 42%  |
| Countryside               | 49%            | 48%  | 50%  | 50%  | 36%                | 36%  | 37%  | 37%  |
| <b>Past 12 months</b>     |                |      |      |      |                    |      |      |      |
| Seaside                   | 58%            | 60%  | 61%  | 63%  | 45%                | 45%  | 48%  | 44%  |
| City/large town           | 73%            | 77%  | 78%  | 77%  | 55%                | 57%  | 57%  | 56%  |
| Small town                | 63%            | 65%  | 65%  | 67%  | 44%                | 45%  | 46%  | 48%  |
| Countryside               | 56%            | 59%  | 59%  | 60%  | 44%                | 46%  | 45%  | 47%  |

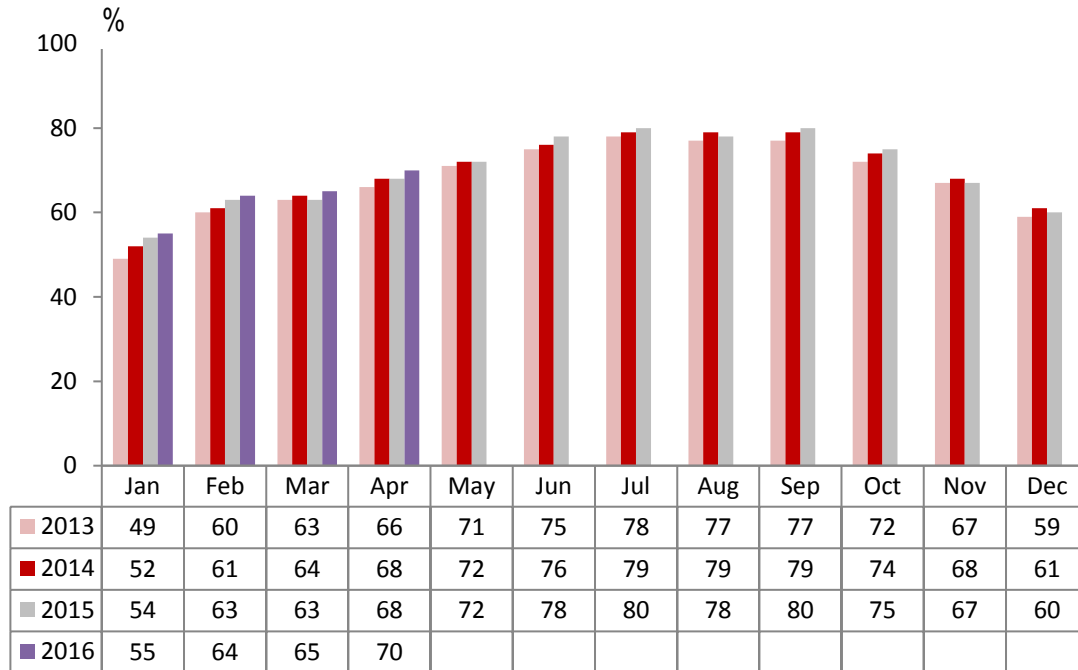
## Establishment Type

|                          | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|--------------------------|----------------|------|------|------|--------------------|------|------|------|
|                          | 2013           | 2014 | 2015 | 2016 | 2013               | 2014 | 2015 | 2016 |
| <b>April</b>             |                |      |      |      |                    |      |      |      |
| Hotel                    | 70%            | 72%  | 71%  | 73%  | 53%                | 55%  | 52%  | 48%  |
| Guesthouse               | 46%            | 53%  | 50%  | 51%  | 36%                | 42%  | 39%  | 38%  |
| B&B                      | 45%            | 48%  | 50%  | 52%  | 34%                | 38%  | 39%  | 40%  |
| <b>Apr(Year to Date)</b> |                |      |      |      |                    |      |      |      |
| Hotel                    | 64%            | 65%  | 66%  | 66%  | 47%                | 48%  | 48%  | 46%  |
| Guesthouse               | 42%            | 43%  | 43%  | 44%  | 31%                | 32%  | 32%  | 33%  |
| B&B                      | 37%            | 38%  | 41%  | 44%  | 27%                | 28%  | 31%  | 33%  |
| <b>Past 12 months</b>    |                |      |      |      |                    |      |      |      |
| Hotel                    | 70%            | 71%  | 73%  | 73%  | 52%                | 53%  | 53%  | 52%  |
| Guesthouse               | 54%            | 55%  | 55%  | 56%  | 43%                | 43%  | 43%  | 44%  |
| B&B                      | 48%            | 49%  | 52%  | 54%  | 37%                | 38%  | 41%  | 43%  |

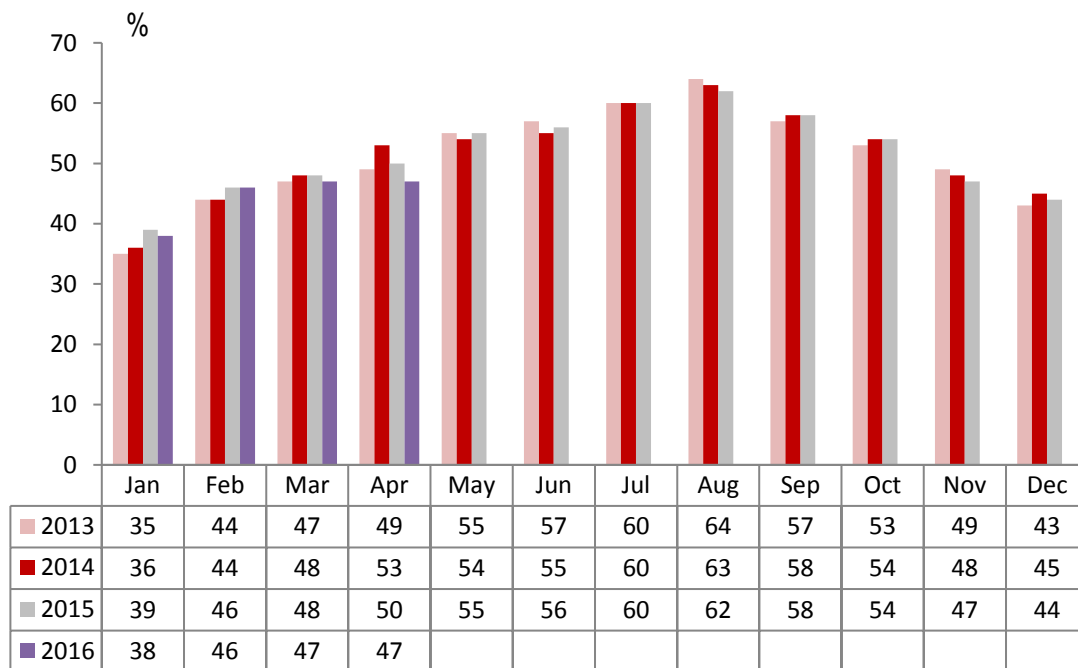
## Number of rooms

|                          | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|--------------------------|----------------|------|------|------|--------------------|------|------|------|
|                          | 2013           | 2014 | 2015 | 2016 | 2013               | 2014 | 2015 | 2016 |
| <b>April</b>             |                |      |      |      |                    |      |      |      |
| 1-3 rooms                | 38%            | 41%  | 44%  | 41%  | 30%                | 34%  | 34%  | 33%  |
| 4-10 rooms               | 44%            | 47%  | 49%  | 50%  | 33%                | 37%  | 38%  | 36%  |
| 11-25 rooms              | 50%            | 61%  | 56%  | 59%  | 37%                | 46%  | 44%  | 44%  |
| 26-50 rooms              | 67%            | 68%  | 62%  | 67%  | 52%                | 53%  | 52%  | 49%  |
| 51-100 rooms             | 69%            | 65%  | 69%  | 68%  | 52%                | 56%  | 51%  | 27%  |
| 100+ rooms               | 76%            | 78%  | 77%  | 78%  | 54%                | 57%  | 54%  | 56%  |
| <b>Apr(Year to Date)</b> |                |      |      |      |                    |      |      |      |
| 1-3 rooms                | 29%            | 30%  | 33%  | 32%  | 22%                | 23%  | 24%  | 24%  |
| 4-10 rooms               | 36%            | 37%  | 41%  | 43%  | 26%                | 27%  | 30%  | 31%  |
| 11-25 rooms              | 46%            | 51%  | 51%  | 51%  | 33%                | 36%  | 37%  | 37%  |
| 26-50 rooms              | 60%            | 61%  | 58%  | 60%  | 45%                | 45%  | 45%  | 44%  |
| 51-100 rooms             | 64%            | 58%  | 62%  | 60%  | 49%                | 45%  | 47%  | 34%  |
| 100+ rooms               | 70%            | 72%  | 73%  | 72%  | 49%                | 51%  | 51%  | 51%  |
| <b>Past 12 months</b>    |                |      |      |      |                    |      |      |      |
| 1-3 rooms                | 40%            | 41%  | 44%  | 45%  | 33%                | 34%  | 35%  | 36%  |
| 4-10 rooms               | 48%            | 50%  | 53%  | 54%  | 38%                | 39%  | 42%  | 43%  |
| 11-25 rooms              | 56%            | 60%  | 61%  | 62%  | 43%                | 45%  | 46%  | 47%  |
| 26-50 rooms              | 67%            | 69%  | 68%  | 68%  | 52%                | 54%  | 53%  | 52%  |
| 51-100 rooms             | 70%            | 66%  | 68%  | 67%  | 55%                | 53%  | 52%  | 45%  |
| 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 |      |      |      |
|--------------------------|----------------|------|------|------|--------------------|------|------|------|
|                          | 2013           | 2014 | 2015 | 2016 | 2013               | 2014 | 2015 | 2016 |
| <b>April</b>             |                |      |      |      |                    |      |      |      |
| East Midlands            | 61%            | 65%  | 59%  | 66%  | 41%                | 46%  | 45%  | 45%  |
| Yorkshire                | 62%            | 66%  | 65%  | 68%  | 46%                | 51%  | 49%  | 50%  |
| London                   | 82%            | 83%  | 79%  | 79%  | 65%                | 66%  | 60%  | 60%  |
| North West               | 56%            | 60%  | 60%  | 62%  | 39%                | 45%  | 43%  | 45%  |
| East of England          | 58%            | 64%  | 64%  | 68%  | 45%                | 49%  | 46%  | 49%  |
| West Midlands            | 66%            | 67%  | 69%  | 73%  | 48%                | 50%  | 49%  | 53%  |
| South West               | 58%            | 61%  | 63%  | 64%  | 44%                | 48%  | 48%  | 30%  |
| South East               | 65%            | 69%  | 69%  | 72%  | 48%                | 51%  | 49%  | 47%  |
| North East               | 60%            | 58%  | 58%  | 64%  | 43%                | 44%  | 41%  | 45%  |
| <b>Apr(Year to Date)</b> |                |      |      |      |                    |      |      |      |
| East Midlands            | 58%            | 57%  | 56%  | 59%  | 39%                | 40%  | 40%  | 41%  |
| Yorkshire                | 56%            | 58%  | 59%  | 61%  | 41%                | 43%  | 43%  | 44%  |
| London                   | 75%            | 76%  | 75%  | 73%  | 59%                | 59%  | 57%  | 55%  |
| North West               | 53%            | 53%  | 56%  | 58%  | 37%                | 38%  | 39%  | 37%  |
| East of England          | 53%            | 59%  | 60%  | 63%  | 39%                | 43%  | 42%  | 44%  |
| West Midlands            | 60%            | 62%  | 65%  | 67%  | 42%                | 44%  | 45%  | 47%  |
| South West               | 51%            | 52%  | 56%  | 57%  | 37%                | 39%  | 42%  | 37%  |
| South East               | 58%            | 61%  | 61%  | 62%  | 41%                | 42%  | 45%  | 40%  |
| North East               | 50%            | 49%  | 55%  | 56%  | 34%                | 36%  | 37%  | 38%  |
| <b>Past 12 months</b>    |                |      |      |      |                    |      |      |      |
| East Midlands            | 64%            | 64%  | 64%  | 65%  | 44%                | 44%  | 45%  | 46%  |
| Yorkshire                | 62%            | 65%  | 67%  | 68%  | 46%                | 49%  | 49%  | 50%  |
| London                   | 80%            | 82%  | 82%  | 80%  | 62%                | 64%  | 62%  | 60%  |
| North West               | 59%            | 61%  | 62%  | 63%  | 43%                | 44%  | 45%  | 42%  |
| East of England          | 61%            | 65%  | 67%  | 69%  | 47%                | 49%  | 49%  | 50%  |
| West Midlands            | 64%            | 66%  | 69%  | 71%  | 46%                | 47%  | 49%  | 51%  |
| South West               | 60%            | 62%  | 65%  | 67%  | 46%                | 48%  | 50%  | 49%  |
| South East               | 66%            | 68%  | 70%  | 71%  | 49%                | 48%  | 50%  | 48%  |
| North East               | 57%            | 58%  | 61%  | 60%  | 41%                | 42%  | 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.