

England Occupancy Survey - February 2016

SUMMARY OF RESULTS

- **Room occupancy** in February was up by 1% to 64%, with **bedspace occupancy** remained unchanged compared to February 2015 at 46%.
- **Weekday** room occupancy was up by 1% at 67% whilst **weekend** room occupancy increased by 3% to 60%. For bedspace occupancy, weekday occupancy remained unchanged and weekend occupancy increased by 2% to 49%.
- **Seaside** was up by 1% to 52% for room occupancy and decreased by 2% to 37% for bedspace occupancy. **City/large towns** room occupancy decreased by 1% to 72%, with bedspace occupancy down 2% to 51%. **Small town** room and bed occupancy increased by 1% to 61% and 42% respectively, with **countryside** occupancy down by 2% for room to 48% while bedspace occupancy remained unchanged at 35%.
- Looking at occupancy by **establishment type**, B&B's saw occupancy increase for room by 2% and by 4% for bed. Hotel occupancy remained unchanged at 67% for room and decreased by 1% to 48% for bed, with guest house showing an increase for room (1%) and a 1% increase for bedspace occupancy at 32%.
- Looking at room occupancy rates by **number of rooms**, all categories varied by 2% or less except 1-3 rooms which decreased by 3%. For bedspace occupancy, only the 1-3 rooms and 51-100 rooms categories saw a change of more than 2%, with a decrease of 3% and 4% respectively. All other categories remained fairly unchanged.
- Looking at **occupancy by region**, the largest shift came from the South West and the East with an increase of 4%. All other regions remained fairly unchanged, with a 3% variation or less. For bedspace occupancy the South East saw the biggest movement, with a 6% decrease to 46%, 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	% +/-
February	63%	64%	+1%	46%	46%	0%
Feb (Year to Date)	59%	59%	0%	42%	42%	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	% +/-
February	53%	55%	+2%	39%	38%	-1%
Feb (Year to Date)	49%	50%	+1%	34%	33%	-1%
Past 12 months	63%	63%	0%	48%	47%	-1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
February								
Weekday	62%	64%	66%	67%	42%	42%	44%	44%
Weekend	54%	56%	57%	60%	45%	46%	47%	49%
Feb (Year to Date)								
Weekday	58%	60%	63%	64%	38%	40%	41%	41%
Weekend	48%	50%	52%	54%	39%	41%	43%	44%
Past 12 months								
Weekday	68%	70%	72%	72%	47%	48%	50%	49%
Weekend	63%	65%	66%	67%	53%	54%	54%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
February								
Seaside	44%	44%	51%	52%	32%	29%	39%	37%
City/large town	68%	72%	73%	72%	51%	53%	53%	51%
Small town	58%	58%	60%	61%	40%	40%	41%	42%
Countryside	47%	48%	50%	48%	35%	35%	35%	35%
Feb (Year to Date)								
Seaside	40%	42%	47%	47%	27%	26%	34%	32%
City/large town	62%	67%	68%	67%	46%	48%	50%	48%
Small town	51%	53%	55%	57%	34%	36%	38%	38%
Countryside	42%	44%	45%	43%	30%	31%	31%	30%
Past 12 months								
Seaside	58%	60%	62%	62%	45%	49%	48%	47%
City/large town	73%	77%	78%	77%	55%	57%	58%	56%
Small town	63%	65%	65%	67%	44%	45%	46%	47%
Countryside	53%	59%	59%	60%	44%	46%	45%	46%

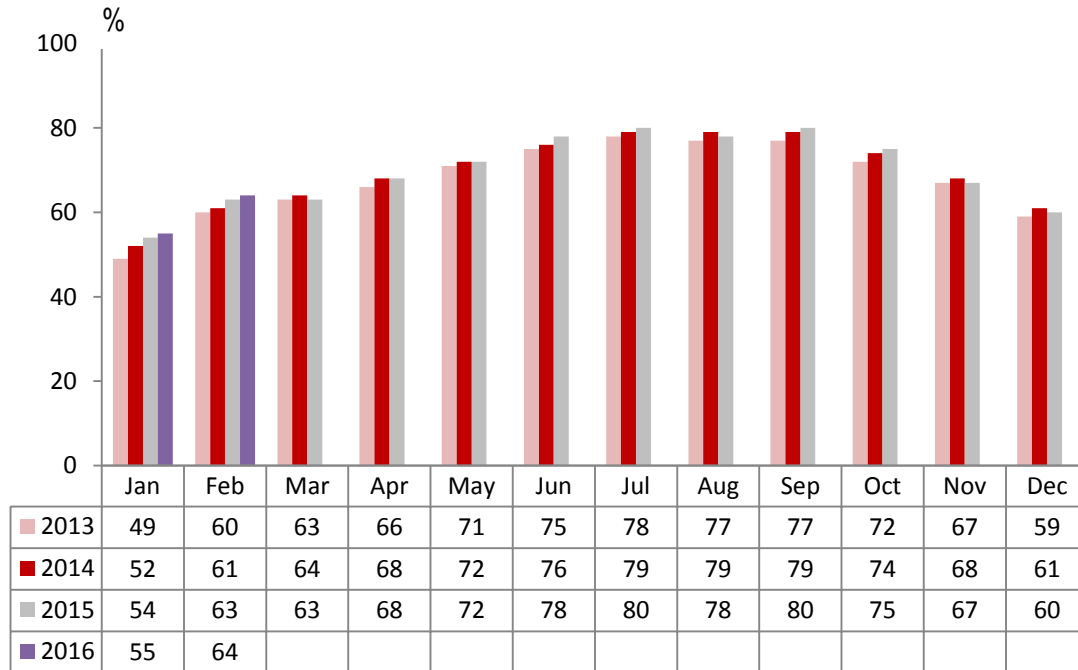
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
February								
Hotel	65%	66%	67%	67%	48%	47%	49%	48%
Guesthouse	42%	39%	42%	43%	31%	29%	31%	32%
B&B	35%	35%	39%	41%	24%	25%	28%	32%
Feb (Year to Date)								
Hotel	59%	60%	62%	62%	42%	43%	45%	44%
Guesthouse	38%	35%	38%	40%	27%	25%	28%	28%
B&B	31%	31%	35%	37%	21%	22%	25%	27%
Past 12 months								
Hotel	70%	72%	73%	73%	52%	54%	54%	53%
Guesthouse	54%	54%	56%	55%	44%	42%	43%	44%
B&B	49%	49%	51%	54%	38%	38%	41%	43%

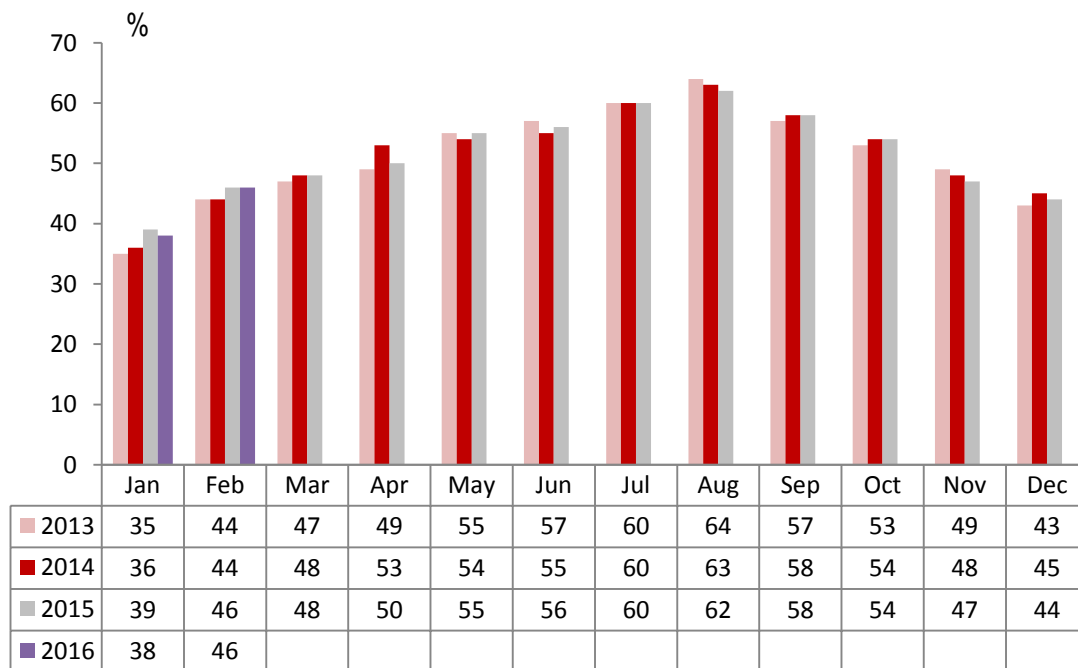
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2013	2014	2015	2016	2013	2014	2015	2016
February								
1-3 rooms	25%	27%	30%	27%	18%	20%	22%	19%
4-10 rooms	33%	33%	39%	41%	23%	23%	28%	29%
11-25 rooms	46%	47%	50%	52%	32%	33%	36%	37%
26-50 rooms	60%	61%	59%	60%	46%	44%	45%	45%
51-100 rooms	65%	57%	60%	61%	51%	43%	46%	42%
100+ rooms	71%	73%	75%	73%	50%	52%	52%	52%
Feb (Year to Date)								
1-3 rooms	22%	24%	27%	25%	16%	18%	19%	17%
4-10 rooms	30%	30%	35%	37%	20%	20%	25%	25%
11-25 rooms	41%	44%	46%	46%	28%	30%	32%	32%
26-50 rooms	54%	55%	54%	56%	40%	39%	41%	41%
51-100 rooms	58%	54%	55%	54%	43%	38%	41%	36%
100+ rooms	65%	67%	69%	68%	45%	47%	48%	48%
Past 12 months								
1-3 rooms	40%	42%	43%	45%	33%	34%	35%	35%
4-10 rooms	48%	50%	52%	53%	38%	39%	41%	42%
11-25 rooms	57%	59%	61%	62%	43%	44%	46%	47%
26-50 rooms	66%	69%	68%	68%	51%	54%	53%	53%
51-100 rooms	70%	68%	67%	68%	55%	53%	53%	49%
100+ rooms	74%	76%	78%	78%	53%	54%	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
February								
East Midlands	60%	58%	58%	57%	43%	40%	41%	41%
Yorkshire	57%	59%	61%	62%	42%	43%	44%	44%
London	75%	75%	75%	74%	59%	58%	58%	56%
North West	54%	53%	57%	57%	38%	37%	40%	40%
East of England	54%	60%	60%	64%	40%	43%	43%	45%
West Midlands	62%	65%	66%	69%	43%	45%	47%	48%
South West	50%	50%	55%	59%	36%	36%	41%	44%
South East	56%	60%	64%	62%	40%	39%	47%	41%
North East	51%	49%	55%	55%	35%	35%	37%	38%
Feb (Year to Date)								
East Midlands	54%	52%	54%	53%	36%	35%	37%	37%
Yorkshire	51%	53%	55%	57%	36%	38%	39%	40%
London	69%	70%	71%	70%	54%	54%	54%	52%
North West	50%	48%	51%	53%	34%	34%	36%	37%
East of England	48%	56%	56%	59%	35%	39%	39%	41%
West Midlands	55%	58%	60%	62%	37%	39%	42%	43%
South West	44%	47%	51%	54%	31%	34%	37%	39%
South East	52%	55%	59%	56%	35%	36%	41%	36%
North East	33%	43%	53%	52%	29%	30%	35%	35%
Past 12 months								
East Midlands	64%	64%	65%	64%	43%	44%	46%	46%
Yorkshire	61%	64%	67%	67%	46%	48%	49%	50%
London	80%	82%	82%	80%	62%	64%	63%	61%
North West	59%	60%	62%	63%	43%	44%	45%	45%
East of England	61%	64%	67%	69%	47%	48%	50%	50%
West Midlands	64%	65%	69%	71%	45%	46%	49%	50%
South West	60%	62%	65%	67%	46%	48%	50%	52%
South East	66%	69%	71%	70%	48%	51%	50%	49%
North East	57%	58%	60%	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.