

England Occupancy Survey - March 2017

SUMMARY OF RESULTS

- **Room occupancy** in March increased by +1% to 66%, with **bedspace occupancy** remaining unchanged when compared to March 2016 at 47%.
- **Weekday** room occupancy increased 2% to 68% whilst **weekend** room occupancy decreased by -2% to 61%. For bedspace occupancy, weekday occupancy increased to 50% whilst weekend occupancy decreased by -10% to 42%. Note that Easter was in April in 2017 where it was in March in 2016.
- **Seaside** increased by +2% to 53% for room occupancy and decreased by -3% to 35% for bedspace occupancy. **City/large towns** room occupancy remained unchanged at 73%, with bedspace remaining unchanged at 51%. **Small town** room occupancy increased by +1% at 65% and decreased by -1% to 43% for bedspace occupancy, with **countryside** occupancy down by -1% for room to 53% while bedspace occupancy decreased by -3% to 39%.
- Looking at occupancy by **establishment type**, hotel occupancy remained increased +1% to 69% and remained unchanged for bed to 49%, with guesthouse showing a -5% decrease for room and -4% for bedspace occupancy to 39% and 30% respectively. B&Bs saw occupancy decrease for room to 45% and decrease by 2% for bed at 35%.
- Looking at room occupancy rates by **number of rooms**, all categories varied by 3% or less except 4-10 rooms which decreased by +6% and 51-100 rooms which decreased by -6%. For bedspace occupancy, only the 4-10 rooms (-5%) and the 51-100 rooms (-6%) saw a change of more than 2%.
- Looking at **occupancy by region**, the largest shift for room occupancy came from London a -5% decrease each. For bedspace occupancy, the East and the North East saw the biggest movements, with a -5% decrease and a +5% increase respectively.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2016	2017	% +/-	2016	2017	% +/-
March	65%	66%	+1%	47%	47%	0%
Mar (Year to Date)	61%	62%	+1%	44%	44%	0%
Past 12 months	70%	71%	+1%	51%	52%	+1%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2016	2017	% +/-	2016	2017	% +/-
March	57%	56%	-1%	41%	37%	-4%
Mar (Year to Date)	53%	53%	0%	36%	35%	-1%
Past 12 months	64%	64%	0%	47%	46%	-1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2014	2015	2016	2017	2014	2015	2016	2017
March								
Weekday	68%	69%	66%	68%	50%	46%	44%	50%
Weekend	58%	59%	63%	61%	44%	48%	52%	42%
Mar (Year to Date)								
Weekday	63%	65%	65%	65%	43%	43%	42%	44%
Weekend	53%	54%	57%	57%	42%	45%	46%	44%
Past 12 months								
Weekday	70%	72%	72%	73%	49%	49%	49%	50%
Weekend	65%	67%	67%	68%	53%	54%	55%	55%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2014	2015	2016	2017	2014	2015	2016	2017
March								
Seaside	49%	42%	51%	53%	37%	39%	38%	35%
City/large town	73%	74%	73%	73%	57%	53%	51%	51%
Small town	59%	62%	64%	65%	41%	42%	44%	43%
Countryside	48%	53%	54%	53%	36%	39%	42%	39%
Mar (Year to Date)								
Seaside	44%	45%	48%	52%	30%	38%	34%	33%
City/large town	68%	70%	69%	69%	50%	51%	49%	50%
Small town	55%	57%	59%	59%	38%	39%	40%	38%
Countryside	45%	48%	47%	49%	33%	34%	34%	35%
Past 12 months								
Seaside	59%	61%	63%	64%	44%	49%	47%	46%
City/large town	77%	78%	77%	77%	57%	57%	56%	56%
Small town	64%	65%	67%	67%	45%	46%	48%	47%
Countryside	59%	59%	60%	61%	46%	46%	46%	47%



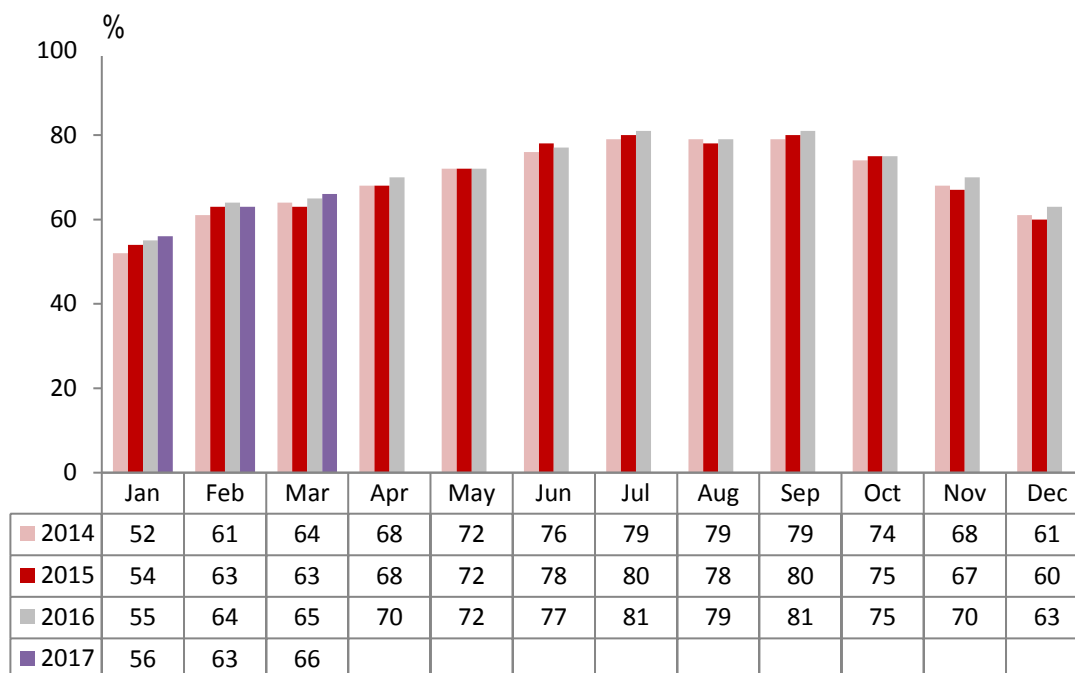
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2014	2015	2016	2017	2014	2015	2016	2017
March								
Hotel	68%	67%	68%	69%	51%	51%	49%	49%
Guesthouse	45%	44%	44%	39%	33%	32%	34%	30%
B&B	38%	43%	47%	45%	28%	32%	37%	35%
Mar (Year to Date)								
Hotel	63%	64%	64%	65%	46%	47%	46%	46%
Guesthouse	39%	41%	41%	40%	28%	29%	31%	31%
B&B	34%	38%	41%	40%	24%	28%	31%	30%
Past 12 months								
Hotel	71%	73%	73%	74%	53%	54%	53%	53%
Guesthouse	54%	56%	56%	56%	42%	43%	44%	45%
B&B	49%	52%	54%	53%	38%	41%	43%	43%

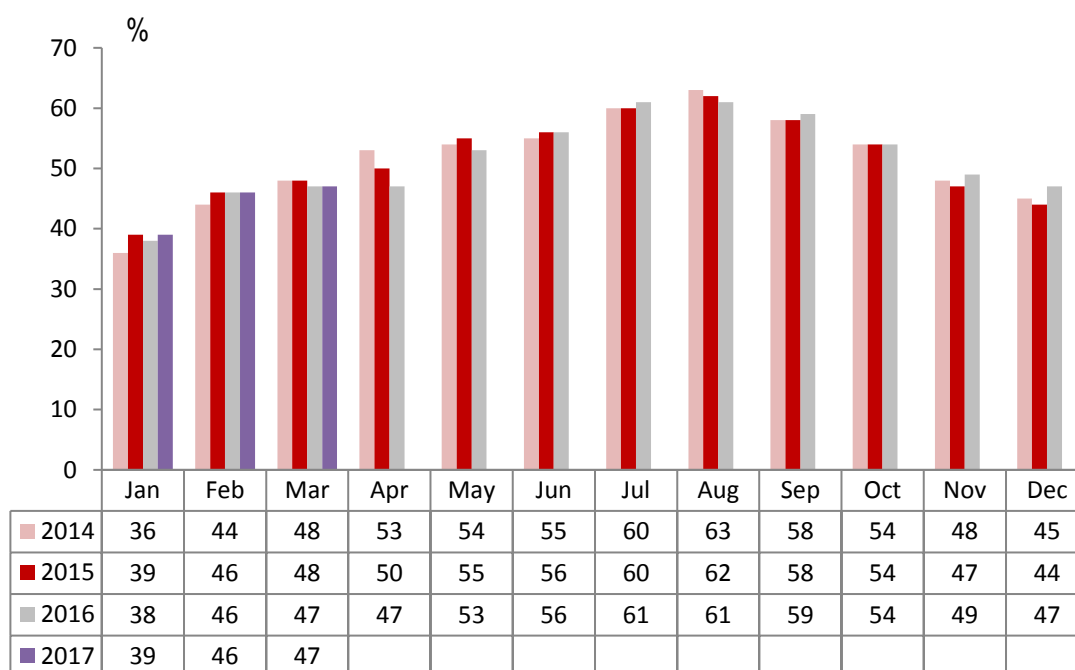
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2014	2015	2016	2017	2014	2015	2016	2017
March								
1-3 rooms	29%	33%	36%	38%	21%	24%	27%	27%
4-10 rooms	38%	42%	45%	39%	27%	30%	33%	28%
11-25 rooms	53%	55%	53%	50%	38%	39%	39%	37%
26-50 rooms	64%	62%	62%	65%	48%	49%	47%	45%
51-100 rooms	60%	67%	65%	59%	56%	54%	44%	38%
100+ rooms	75%	75%	74%	76%	53%	52%	52%	54%
Mar (Year to Date)								
1-3 rooms	26%	29%	29%	31%	19%	21%	21%	23%
4-10 rooms	33%	37%	40%	35%	23%	27%	28%	25%
11-25 rooms	48%	49%	49%	48%	33%	35%	34%	36%
26-50 rooms	58%	57%	58%	58%	42%	43%	43%	39%
51-100 rooms	56%	60%	58%	57%	43%	46%	39%	38%
100+ rooms	70%	71%	70%	72%	49%	50%	49%	51%
Past 12 months								
1-3 rooms	41%	44%	45%	44%	33%	35%	36%	35%
4-10 rooms	50%	52%	54%	52%	39%	41%	43%	41%
11-25 rooms	59%	62%	62%	62%	45%	46%	47%	49%
26-50 rooms	69%	68%	68%	68%	54%	53%	53%	50%
51-100 rooms	66%	68%	68%	68%	53%	53%	49%	47%
100+ rooms	76%	78%	77%	79%	54%	55%	55%	56%

England Room Occupancy by Month



England Bedspace Occupancy by Month





Regional Information

	Room Occupancy				Bedspace Occupancy			
	2014	2015	2016	2017	2014	2015	2016	2017
March								
East Midlands	57%	57%	62%	61%	43%	41%	43%	41%
Yorkshire	61%	60%	63%	64%	45%	42%	46%	46%
London	80%	77%	75%	80%	62%	57%	56%	60%
North West	57%	59%	59%	59%	40%	41%	42%	41%
East of England	67%	63%	64%	60%	44%	44%	45%	40%
West Midlands	55%	69%	71%	72%	48%	48%	50%	51%
South West	63%	59%	59%	56%	40%	44%	44%	40%
South East	51%	57%	63%	65%	46%	51%	43%	43%
North East	51%	54%	55%	59%	36%	36%	37%	42%
Mar (Year to Date)								
East Midlands	54%	55%	56%	56%	38%	39%	39%	37%
Yorkshire	56%	57%	59%	60%	40%	40%	42%	43%
London	73%	73%	71%	74%	56%	55%	54%	56%
North West	51%	54%	55%	54%	36%	38%	39%	38%
East of England	57%	58%	61%	59%	41%	41%	42%	39%
West Midlands	61%	64%	65%	66%	42%	44%	45%	46%
South West	49%	54%	56%	52%	36%	39%	41%	37%
South East	58%	58%	58%	62%	39%	45%	38%	41%
North East	46%	54%	53%	55%	37%	36%	36%	38%
Past 12 months								
East Midlands	65%	65%	64%	65%	44%	45%	46%	46%
Yorkshire	64%	67%	67%	69%	48%	49%	50%	51%
London	82%	82%	80%	81%	64%	63%	60%	62%
North West	60%	62%	63%	63%	44%	45%	45%	46%
East of England	65%	67%	69%	68%	48%	50%	50%	48%
West Midlands	66%	69%	71%	71%	47%	49%	51%	51%
South West	62%	65%	67%	66%	48%	50%	52%	50%
South East	68%	70%	71%	71%	48%	51%	48%	48%
North East	58%	61%	60%	65%	45%	42%	42%	46%

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.