

England Occupancy Survey - December 2013

SUMMARY OF RESULTS

- Room occupancy in December increased by 3% compared with the same period in 2012, rising to 59%, with bedspace occupancy remaining broadly flat (+1%). Positively, both room and bedspace occupancy rates are up slightly for the year to date (by +2%).
- Both weekday and weekend room occupancy in December have increased against last year's figures (up 3% to 60% for weekday and up 2% to 55% for weekend occupancy). For bedspace, weekday occupancy increased slightly (up 2% to 41%) with weekend occupancy remaining broadly flat (up 1% to 45%). The same pattern is also evident for the year to date.
- City/large town locations saw the biggest uplift in room occupancy in December (up 5% to 69%), with bedspace occupancy also up slightly (+2% to 52%). Seaside locations saw an uplift in room and a decline in bedspace occupancy (+3% and -2% respectively). Small towns saw increases in both room and bedspace occupancy (up 3% and 2% respectively), with occupancy in countryside locations showing the same pattern.
- Looking at occupancy by establishment type, both hotels and B&B's have seen increases in occupancy levels (up 3% each for room occupancy and +1/+2% for bedspace). Guesthouses have seen a decline against the year before, by -2% for room and -4% for bedspace.
- When looking at occupancy figures for December by number of rooms, almost all have witnessed increases compared with December last year. The 11-25 room category saw the greatest increases, at +6% for room and +3 for bedspace occupancy. The 51-100 room category was the only category to see a decline (-3% for room and -2% for bedspace).
- There was some variability by region, with the East of England and the South East seeing the largest increases in room occupancy when compared to December last year (up 5% and 4% respectively). The East Midlands saw the biggest uplift in bedspace occupancy (up 4%) with the East of England and Yorkshire also up against last year (+2% respectively).

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
December	56%	59%	+3%	42%	43%	+1%
Jan-Dec	66%	68%	+2%	50%	52%	+2%
Past 12 months	66%	68%	+2%	50%	52%	+2%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
December	49%	51%	+2%	37%	38%	+1%
Jan-Dec	61%	63%	+2%	47%	49%	+2%
Past 12 months	61%	63%	+2%	47%	49%	+2%

Please note that STR 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.

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
December								
Weekday	52%	56%	57%	60%	36%	39%	39%	41%
Weekend	52%	55%	53%	55%	43%	45%	44%	45%
Jan-Dec								
Weekday	61%	68%	67%	70%	42%	47%	46%	48%
Weekend	59%	63%	63%	65%	50%	52%	52%	54%
Past 12 months								
Weekday	61%	68%	67%	70%	42%	47%	46%	48%
Weekend	59%	63%	63%	65%	50%	52%	52%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
December								
Seaside	37%	41%	43%	46%	28%	33%	33%	31%
City/large town	64%	63%	64%	69%	49%	49%	50%	52%
Small town	47%	49%	51%	54%	33%	35%	35%	37%
Countryside	40%	46%	45%	48%	29%	35%	34%	36%
Jan-Dec								
Seaside	54%	56%	57%	60%	43%	47%	45%	50%
City/large town	70%	73%	73%	77%	51%	55%	55%	57%
Small town	55%	61%	63%	65%	44%	42%	44%	45%
Countryside	53%	57%	55%	59%	42%	44%	44%	46%
Past 12 months								
Seaside	54%	56%	57%	60%	44%	47%	45%	50%
City/large town	70%	73%	73%	77%	51%	55%	55%	57%
Small town	55%	61%	63%	65%	44%	42%	44%	45%
Countryside	53%	57%	55%	59%	42%	44%	44%	46%

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Establishment Type

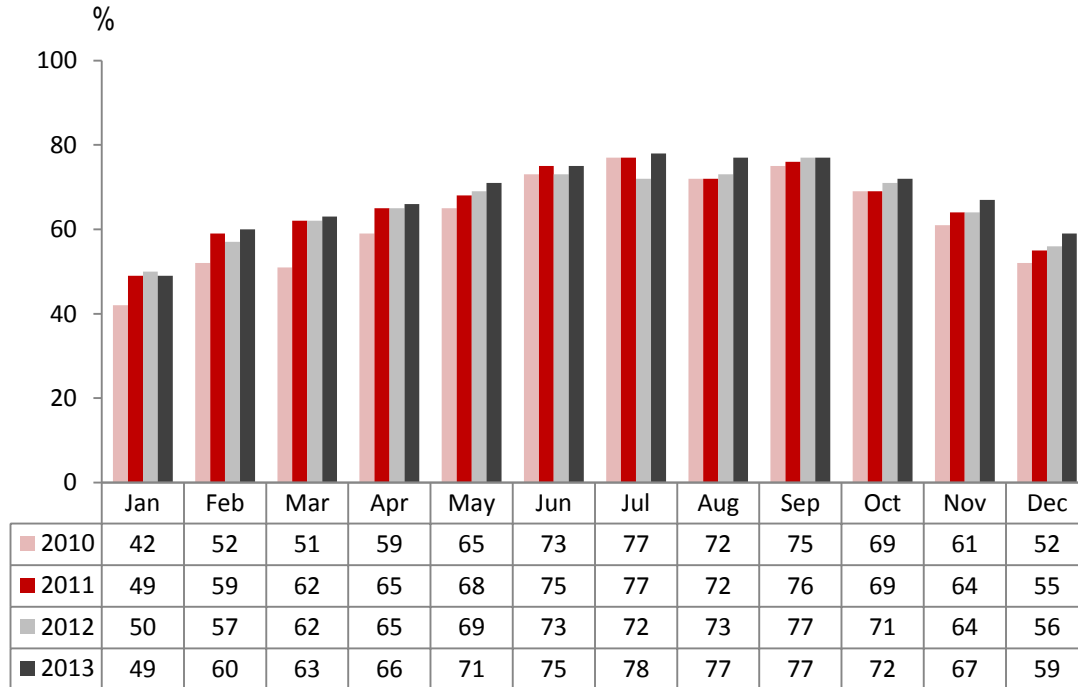
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
December								
Hotel	57%	59%	59%	62%	42%	46%	45%	46%
Guesthouse	35%	36%	42%	40%	25%	26%	33%	29%
B&B	27%	33%	32%	35%	19%	23%	23%	25%
Jan-Dec								
Hotel	64%	69%	69%	72%	49%	52%	52%	54%
Guesthouse	52%	54%	54%	54%	41%	43%	43%	42%
B&B	47%	49%	48%	49%	37%	37%	38%	38%
Past 12 months								
Hotel	64%	69%	69%	72%	49%	52%	52%	54%
Guesthouse	52%	54%	54%	54%	41%	43%	43%	42%
B&B	47%	49%	48%	49%	37%	37%	38%	38%

Number of rooms

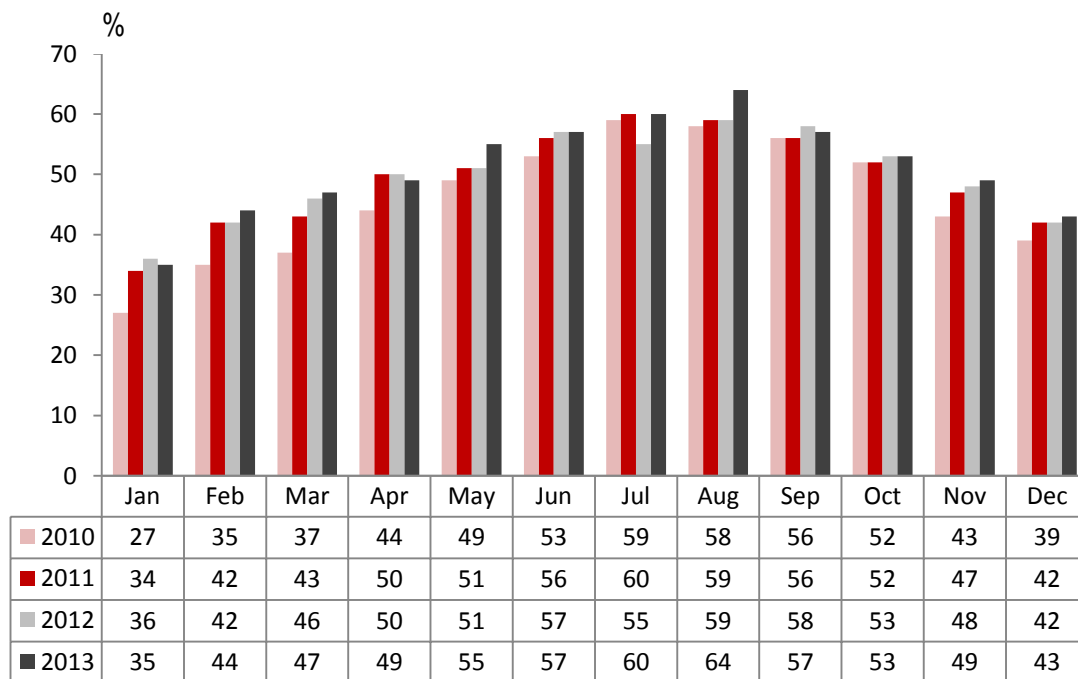
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
December								
1-3 rooms	21%	25%	24%	25%	15%	18%	19%	19%
4-10 rooms	29%	32%	32%	34%	22%	23%	24%	25%
11-25 rooms	44%	45%	45%	51%	32%	32%	32%	35%
26-50 rooms	48%	49%	54%	58%	35%	38%	41%	44%
51-100 rooms	58%	60%	59%	56%	44%	49%	47%	45%
100+ rooms	63%	64%	65%	68%	46%	47%	47%	48%
Jan-Dec								
1-3 rooms	41%	41%	40%	41%	32%	33%	33%	33%
4-10 rooms	49%	49%	48%	50%	39%	39%	38%	39%
11-25 rooms	56%	57%	56%	59%	43%	44%	43%	44%
26-50 rooms	64%	62%	65%	69%	49%	48%	50%	54%
51-100 rooms	69%	69%	70%	69%	54%	53%	55%	54%
100+ rooms	68%	75%	74%	76%	n/a	53%	52%	54%
Past 12 months								
1-3 rooms	41%	41%	40%	41%	32%	33%	33%	33%
4-10 rooms	49%	49%	48%	50%	39%	39%	38%	39%
11-25 rooms	56%	57%	56%	59%	43%	44%	43%	44%
26-50 rooms	64%	62%	65%	69%	49%	48%	50%	54%
51-100 rooms	69%	69%	70%	69%	54%	53%	55%	54%
100+ rooms	68%	75%	74%	76%	n/a	53%	53%	54%

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England Room Occupancy by Month



England Bedspace Occupancy by Month



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Regional Information

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
December								
East Midlands	50%	51%	53%	56%	34%	34%	35%	39%
Yorkshire	43%	50%	52%	55%	33%	38%	38%	40%
London	74%	74%	74%	76%	58%	59%	58%	59%
North West	46%	49%	52%	54%	33%	36%	38%	39%
East of England	47%	51%	52%	57%	35%	40%	40%	42%
West Midlands	49%	50%	52%	54%	35%	36%	37%	38%
South West	42%	45%	45%	47%	31%	35%	34%	35%
South East	48%	50%	52%	56%	33%	38%	39%	38%
North East	39%	47%	39%	42%	24%	34%	28%	28%
Jan-Dec								
East Midlands	56%	62%	63%	65%	39%	41%	43%	45%
Yorkshire	55%	60%	60%	64%	41%	44%	45%	48%
London	79%	82%	80%	82%	62%	64%	62%	64%
North West	56%	56%	58%	61%	42%	41%	42%	44%
East of England	57%	61%	61%	64%	45%	48%	47%	48%
West Midlands	58%	63%	63%	65%	46%	45%	45%	46%
South West	58%	61%	60%	62%	46%	47%	47%	48%
South East	56%	63%	65%	68%	45%	47%	48%	51%
North East	51%	65%	56%	58%	36%	47%	41%	41%
Past 12 months								
East Midlands	56%	62%	63%	65%	39%	41%	43%	45%
Yorkshire	55%	60%	60%	64%	41%	44%	45%	48%
London	79%	82%	80%	82%	62%	64%	62%	64%
North West	56%	56%	58%	61%	42%	41%	42%	44%
East of England	57%	61%	61%	64%	45%	48%	47%	48%
West Midlands	58%	63%	63%	65%	46%	45%	45%	46%
South West	58%	61%	60%	62%	46%	47%	47%	48%
South East	56%	63%	65%	68%	45%	47%	48%	51%
North East	51%	65%	56%	58%	36%	47%	41%	41%

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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.

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