

England Occupancy Survey - March 2013

SUMMARY OF RESULTS

- Room occupancy (including STR Global data) increased by 1% in March 2013 compared with the same period in 2012 (rising from 62% to 63%). Bedspace Occupancy (including STR Global data) also increased by the same percentage, rising from 46% to 47%.
- Both room and bedspace occupancy levels are at their highest March levels since the survey began.
- Room and Bedspace occupancy in countryside locations has shown the greatest increases since 2011, rising by 3% and 5% respectively. Seaside room and bed occupancy also rose in March, by 2% and 3% respectively.
- Weekday room occupancy in March fell by 1% against last year, whilst weekend occupancy rose by 2%. For bedspace, weekday rose by 1% and weekend by 2%.
- The largest increases in occupancy by establishment type are in Guesthouse accommodation (up 3% for both room and bed). The March data has also pushed the year-to-date average to 4% for both levels of occupancy.
- Accommodation businesses with 51-100 rooms have seen the greatest increases in both room and bed occupancy (+3% for room and +9% for bedspace). Businesses with 11-25 rooms are the only grouping to have seen a decrease in March 2013 when compared to March 2012 (by -3% for room and 2% for bedspace)
- With regards to room occupancy, Yorkshire and the East Midlands have seen the largest increases in March occupancy rates when compared to last year (+5% and +4%). East of England is the only area to see a decline in room occupancy for March (by 3%). Nevertheless, looking at room occupancy data for the past 12 months, the North East has shown the greatest decline (by 8%)
- As with room occupancy, bedspace occupancy rates in the East Midland and Yorkshire have shown the biggest increases, although this time the ranking has flipped, with bedspace occupancy in the East Midlands rising by 8% and Yorkshire by 4%. Again, East of England has shown the largest decline, falling by 2% for March 2013 vs. March 2012. However, the North East has again shown the largest percentage drop when looking at past 12 month data, falling by 6%.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
March	62%	63%	1%	46%	47%	1%
Jan-Mar	56%	58%	2%	41%	42%	1%
Past 12 months	66%	66%	0%	50%	50%	0%

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.

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
March	56%	57%	1%	41%	44%	3%
Jan-Mar	50%	51%	1%	36%	37%	1%
Past 12 months	60%	61%	1%	47%	48%	1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
March								
Weekday	52%	64%	66%	65%	34%	41%	43%	44%
Weekend	49%	56%	58%	60%	41%	45%	48%	50%
Jan-Mar								
Weekday	52%	60%	60%	60%	32%	39%	39%	40%
Weekend	46%	50%	52%	53%	36%	41%	42%	44%
Past 12 months								
Weekday	60%	62%	68%	68%	41%	43%	47%	47%
Weekend	58%	60%	64%	63%	49%	50%	53%	53%

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Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
March								
Seaside	43%	44%	48%	50%	29%	34%	36%	39%
City/large town	67%	71%	71%	71%	46%	51%	53%	54%
Small town	39%	58%	60%	60%	36%	38%	41%	43%
Countryside	42%	51%	49%	52%	31%	34%	35%	40%
Jan-Mar								
Seaside	38%	40%	42%	43%	26%	30%	31%	31%
City/large town	61%	66%	65%	65%	41%	48%	48%	49%
Small town	41%	53%	54%	54%	31%	34%	36%	37%
Countryside	38%	44%	44%	46%	26%	29%	32%	34%
Past 12 months								
Seaside	54%	54%	56%	58%	43%	44%	47%	45%
City/large town	67%	71%	72%	73%	48%	53%	55%	55%
Small town	54%	57%	61%	63%	42%	44%	43%	44%
Countryside	50%	54%	57%	56%	39%	42%	44%	45%

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Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
March								
Hotel	55%	65%	67%	68%	41%	46%	49%	51%
Guesthouse	40%	44%	42%	45%	28%	30%	31%	34%
B&B	38%	40%	41%	41%	28%	29%	29%	30%
Jan-Mar								
Hotel	54%	60%	61%	62%	38%	43%	44%	45%
Guesthouse	35%	39%	36%	40%	24%	27%	26%	30%
B&B	33%	36%	34%	35%	24%	25%	24%	24%
Past 12 months								
Hotel	62%	65%	69%	70%	47%	50%	52%	52%
Guesthouse	51%	53%	53%	55%	40%	42%	42%	44%
B&B	47%	48%	48%	49%	38%	38%	37%	38%

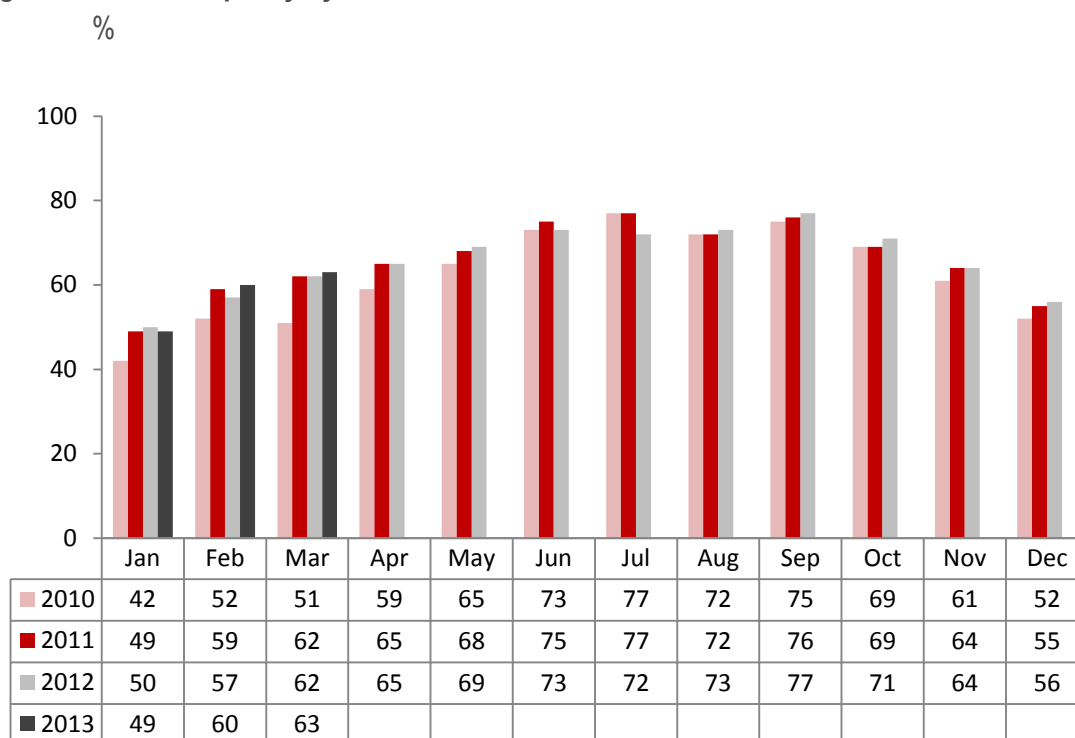
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Number of rooms

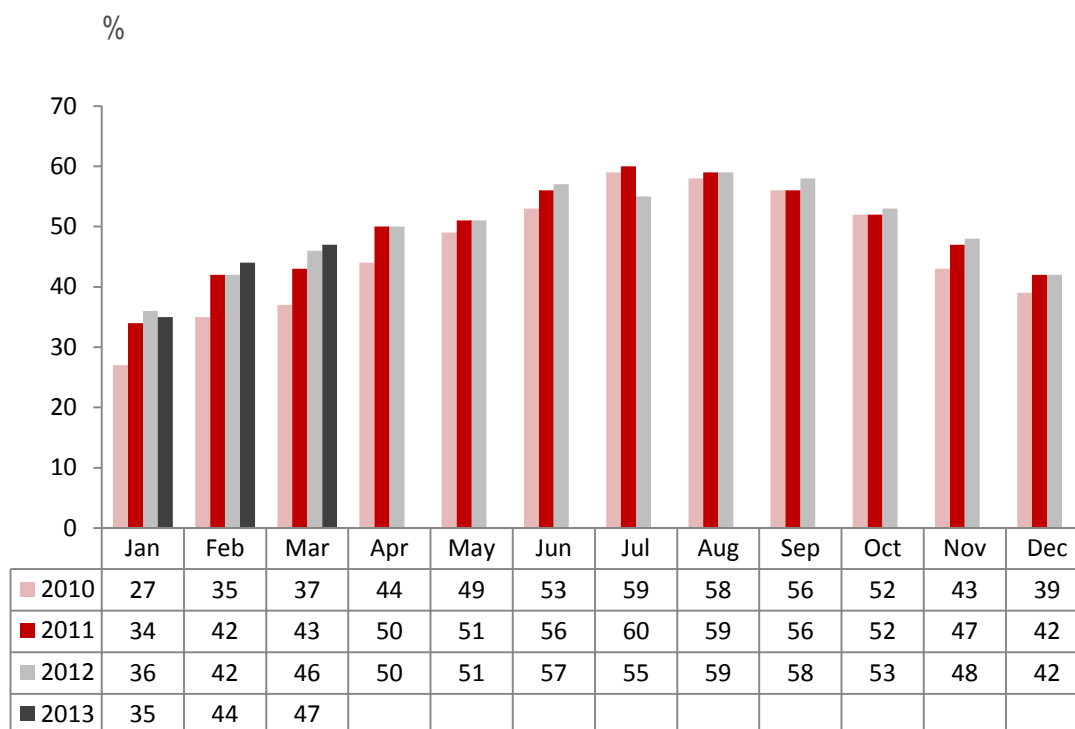
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
March								
1-3 rooms	31%	31%	31%	33%	22%	23%	24%	25%
4-10 rooms	38%	39%	39%	39%	28%	27%	29%	30%
11-25 rooms	47%	49%	52%	49%	33%	36%	38%	36%
26-30 rooms	58%	58%	63%	65%	41%	41%	46%	49%
51-100 rooms	68%	65%	67%	70%	52%	44%	49%	58%
100+ rooms	50%	72%	72%	73%	n/a	49%	50%	51%
Jan-Mar								
1-3 rooms	27%	27%	26%	26%	19%	19%	19%	19%
4-10 rooms	34%	34%	33%	33%	28%	27%	29%	24%
11-25 rooms	41%	45%	44%	44%	33%	36%	38%	31%
26-30 rooms	52%	53%	53%	58%	41%	41%	46%	43%
51-100 rooms	60%	60%	62%	62%	52%	44%	49%	48%
100+ rooms	56%	67%	67%	68%	n/a	49%	50%	47%
Past 12 months								
1-3 rooms	40%	41%	41%	40%	32%	33%	33%	33%
4-10 rooms	50%	50%	49%	48%	40%	40%	39%	38%
11-25 rooms	53%	57%	57%	56%	41%	44%	44%	43%
26-30 rooms	62%	63%	63%	66%	48%	48%	49%	51%
51-100 rooms	67%	68%	69%	70%	54%	52%	53%	56%
100+ rooms	64%	74%	74%	74%	n/a	52%	53%	53%

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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
March								
East Midlands	50%	61%	57%	61%	33%	38%	37%	45%
Yorkshire	49%	55%	55%	60%	33%	33%	40%	44%
London	75%	81%	78%	80%	55%	62%	60%	62%
North West	58%	50%	56%	57%	38%	34%	39%	41%
East of England	52%	56%	58%	55%	34%	42%	43%	41%
West Midlands	47%	64%	63%	63%	36%	44%	44%	45%
South West	50%	56%	55%	55%	37%	39%	42%	41%
South East	37%	55%	60%	61%	34%	38%	43%	44%
North East	28%	63%	52%	53%	21%	41%	36%	36%
Jan-Mar								
East Midlands	46%	56%	55%	57%	29%	35%	34%	39%
Yorkshire	41%	51%	50%	54%	28%	34%	36%	39%
London	71%	75%	74%	73%	50%	58%	55%	57%
North West	52%	48%	48%	52%	34%	33%	34%	36%
East of England	48%	52%	52%	51%	30%	37%	38%	37%
West Midlands	42%	58%	55%	57%	31%	40%	38%	40%
South West	43%	49%	48%	48%	31%	35%	36%	35%
South East	42%	51%	53%	55%	31%	35%	38%	38%
North East	52%	56%	45%	46%	33%	37%	31%	31%
Past 12 months								
East Midlands	54%	59%	62%	64%	39%	40%	41%	44%
Yorkshire	56%	57%	60%	61%	45%	41%	45%	46%
London	78%	80%	82%	80%	57%	65%	63%	62%
North West	58%	54%	57%	59%	41%	41%	41%	43%
East of England	56%	58%	61%	61%	44%	46%	48%	47%
West Midlands	55%	61%	62%	64%	43%	49%	44%	45%
South West	58%	59%	61%	60%	46%	47%	48%	46%
South East	53%	57%	63%	66%	41%	44%	48%	49%
North East	58%	52%	65%	57%	40%	37%	47%	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.