

England Occupancy Survey - April 2014

SUMMARY OF RESULTS

- Both room and bedspace occupancy in April showed increases, of +2% for room, rising to 68%, and +4% for bedspace, rising to 53%.
- Weekday occupancy in April increased for both room and bedspace occupancy when compared to the same period last year (up +2% to 69% for room and up +4% to 50% for bedspace). Weekend occupancy also increased for both room and bed occupancy (+6% for each respectively).
- All location types have seen increases in occupancy, particularly seaside locations who saw increases of +5% for both room and bedspace compared with April last year.
- Looking at occupancy by establishment type, guesthouse occupancy saw the biggest increases for both room and bedspace (up 7% and +6% respectively). B&B's saw increases of +3% for room and +4% for bedspace, with hotel occupancy up +2% for both room and bedspace occupancy.
- When looking at occupancy figures for April by number of rooms, the 11-25 room category increased by +11% for room occupancy compared with April last year, with bedspace occupancy up +9%. All other categories saw increases, apart from room occupancy in the 51-100 category, which was down -4%.
- The East of England saw the greatest increase in room occupancy in April compared with last year, up 6% to 64%, with all other areas witnessing increases, aside from the North East, which saw a decline of -2% for room occupancy. For bedspace occupancy, the North West saw the greatest increase in occupancy levels (+6%), with Yorkshire and the East Midlands not far behind (+5% each respectively).

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
April	66%	68%	+2%	49%	53%	+4%
Jan-Apr	60%	61%	+1%	44%	45%	+1%
Past 12 months	66%	68%	+2%	50%	51%	+1%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
April	59%	61%	+2%	45%	47%	+2%
Jan-Apr	53%	53%	0%	39%	38%	-1%
Past 12 months	61%	62%	+1%	47%	48%	+1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
April								
Weekday	65%	65%	67%	69%	45%	45%	46%	50%
Weekend	65%	64%	61%	67%	54%	54%	50%	56%
Jan-Apr								
Weekday	61%	61%	62%	64%	40%	41%	42%	45%
Weekend	54%	55%	55%	57%	44%	45%	45%	45%
Past 12 months								
Weekday	62%	68%	68%	70%	43%	47%	47%	49%
Weekend	60%	63%	63%	65%	50%	53%	53%	53%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
April								
Seaside	58%	53%	53%	58%	45%	41%	42%	47%
City/large town	71%	74%	74%	78%	55%	56%	56%	59%
Small town	58%	59%	61%	64%	42%	43%	42%	47%
Countryside	57%	55%	57%	58%	46%	45%	44%	44%
Jan-Apr								
Seaside	45%	45%	46%	48%	35%	34%	35%	34%
City/large town	67%	67%	67%	71%	50%	50%	51%	53%
Small town	54%	55%	56%	57%	36%	38%	38%	40%
Countryside	48%	47%	49%	48%	33%	36%	36%	36%
Past 12 months								
Seaside	55%	56%	58%	60%	45%	47%	45%	45%
City/large town	71%	73%	73%	77%	54%	55%	55%	57%
Small town	57%	61%	63%	65%	41%	43%	44%	45%
Countryside	54%	57%	56%	59%	42%	44%	44%	46%

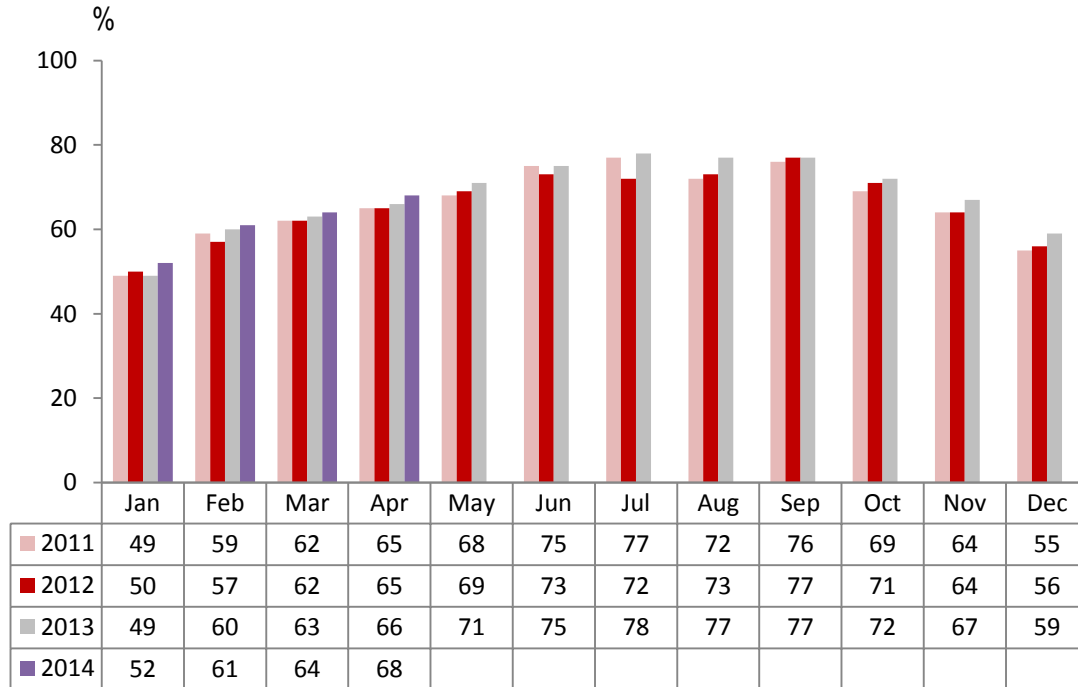
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
April								
Hotel	68%	68%	70%	72%	52%	52%	53%	55%
Guesthouse	54%	52%	46%	53%	43%	41%	36%	42%
B&B	50%	48%	45%	48%	41%	40%	34%	38%
Jan-Apr								
Hotel	62%	63%	64%	65%	45%	46%	47%	48%
Guesthouse	43%	40%	42%	43%	32%	30%	31%	32%
B&B	40%	38%	37%	38%	29%	28%	27%	28%
Past 12 months								
Hotel	65%	69%	70%	71%	49%	52%	52%	53%
Guesthouse	54%	53%	54%	55%	42%	42%	43%	43%
B&B	48%	48%	48%	49%	38%	37%	37%	38%

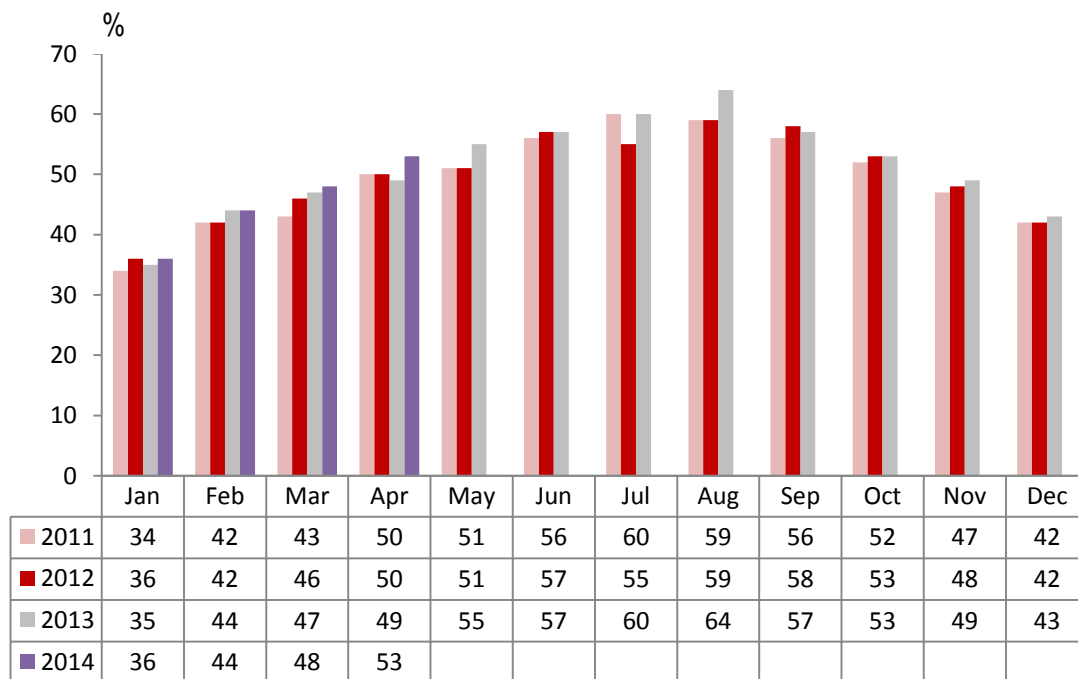
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
April								
1-3 rooms	43%	39%	38%	41%	36%	32%	30%	34%
4-10 rooms	50%	45%	44%	47%	39%	36%	33%	37%
11-25 rooms	56%	55%	50%	61%	45%	42%	37%	46%
26-30 rooms	63%	65%	67%	68%	50%	49%	52%	53%
51-100 rooms	68%	69%	69%	65%	50%	57%	52%	56%
100+ rooms	72%	73%	76%	78%	54%	52%	54%	57%
Jan-Apr								
1-3 rooms	31%	29%	29%	30%	23%	22%	22%	23%
4-10 rooms	38%	36%	36%	37%	28%	27%	26%	27%
11-25 rooms	48%	47%	46%	51%	36%	34%	33%	36%
26-30 rooms	55%	56%	60%	61%	40%	42%	45%	45%
51-100 rooms	62%	64%	64%	58%	44%	48%	49%	45%
100+ rooms	68%	68%	70%	72%	48%	48%	49%	51%
Past 12 months								
1-3 rooms	41%	41%	40%	41%	33%	33%	33%	34%
4-10 rooms	50%	49%	48%	50%	40%	38%	38%	39%
11-25 rooms	57%	57%	56%	60%	44%	44%	43%	45%
26-30 rooms	63%	63%	67%	69%	48%	49%	52%	54%
51-100 rooms	68%	70%	70%	66%	51%	54%	55%	53%
100+ rooms	78%	74%	74%	76%	52%	53%	53%	54%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
April								
East Midlands	62%	58%	61%	65%	41%	45%	41%	46%
Yorkshire	59%	58%	62%	66%	40%	43%	46%	51%
London	81%	83%	82%	83%	66%	64%	65%	66%
North West	55%	56%	56%	60%	41%	41%	39%	45%
East of England	57%	54%	58%	64%	48%	45%	45%	49%
West Midlands	61%	61%	66%	67%	46%	44%	48%	50%
South West	61%	58%	58%	61%	48%	45%	44%	48%
South East	65%	64%	65%	69%	49%	48%	48%	51%
North East	61%	57%	60%	58%	46%	41%	43%	44%
Jan-Apr								
East Midlands	58%	56%	58%	57%	36%	37%	39%	40%
Yorkshire	53%	52%	56%	58%	36%	38%	41%	43%
London	77%	76%	75%	76%	60%	57%	59%	59%
North West	49%	50%	53%	53%	35%	36%	37%	38%
East of England	53%	53%	53%	59%	40%	40%	39%	43%
West Midlands	59%	57%	60%	62%	41%	39%	42%	44%
South West	52%	51%	51%	52%	39%	38%	37%	39%
South East	55%	56%	58%	61%	39%	41%	41%	42%
North East	57%	48%	50%	49%	39%	35%	34%	36%
Past 12 months								
East Midlands	60%	62%	64%	64%	41%	41%	44%	44%
Yorkshire	56%	60%	62%	65%	40%	45%	46%	49%
London	82%	82%	80%	82%	68%	63%	62%	64%
North West	53%	57%	59%	61%	40%	41%	43%	44%
East of England	58%	61%	61%	65%	46%	48%	47%	49%
West Midlands	62%	62%	64%	66%	50%	44%	46%	47%
South West	59%	61%	60%	62%	47%	47%	46%	48%
South East	57%	63%	66%	68%	41%	48%	49%	48%
North East	54%	64%	57%	58%	38%	47%	41%	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.