

England Occupancy Survey - December 2014

SUMMARY OF RESULTS

- Room occupancy in December was up +2% to 61%, with bedspace occupancy also up, by +2% to 45%. Looking at 2014 as a whole, room occupancy is up +1% to 69%, with bedspace flat (0%) at 52%.
- Weekday occupancy in November was up for both room and bedspace occupancy (+2% and +1%), with weekend occupancy performing strongly on both measures, at +5% for room and +4% for bedspace. For the year, weekday occupancy is up +1% for both room and bed, with weekend up +1% for room, and flat (0%) for bedspace.
- Occupancy levels were up across all location types for both room and bedspace, apart from countryside, which saw levels drop slightly on both measures. For 2014 as a whole the picture is broadly flat, apart from seaside which dropped by -3% for bedspace.
- Looking at occupancy by establishment type, hotels saw a +3% and +2% increase for both room and bedspace in December, with B&B's up +2% and +4% respectively. Guesthouses remained flat (0%) on both measures. Looking at 2014, there were increases in each establishment type and on both occupancy measures, apart from hotel bedspace which remained flat (0%)
- Looking at number of rooms, increases are evident across each almost category for the month, apart from the 26-50 category which remained flat for both measure of occupancy, and bedspace for the 51-100 room category. For 2014 as a whole, there were increases in all categories apart from the 26-50 category which was flat and the 51-100 room category which is down -3% for room and -1% for bedspace.
- Looking at occupancy by region, there were increases across all regions for the month, and for both measures, apart from the East Midlands, which remained flat for both measures, and London which was flat for bedspace. Looking at full-year 2014 data, there were increases in each region, apart from the East Midlands, London and the North West which remained broadly flat. The South East also remained broadly flat for bedspace occupancy.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
December	59%	61%	+2%	43%	45%	+2%
Jan-Dec	68%	69%	+1%	52%	52%	0%
Past 12 months	68%	69%	+1%	52%	52%	0%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
December	51%	51%	0%	38%	38%	0%
Jan-Dec	63%	62%	-1%	49%	47%	-2%
Past 12 months	63%	62%	-1%	49%	47%	-2%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
December								
Weekday	56%	57%	60%	62%	39%	39%	41%	42%
Weekend	55%	53%	55%	60%	45%	44%	45%	49%
Jan-Dec								
Weekday	68%	67%	70%	71%	47%	46%	48%	49%
Weekend	63%	63%	65%	66%	52%	52%	54%	54%
Past 12 months								
Weekday	68%	67%	70%	71%	47%	46%	48%	49%
Weekend	63%	63%	65%	66%	52%	52%	54%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
December								
Seaside	41%	43%	46%	47%	33%	33%	31%	39%
City/large town	63%	64%	69%	72%	49%	50%	52%	53%
Small town	49%	51%	54%	56%	35%	35%	37%	39%
Countryside	46%	45%	48%	46%	35%	34%	36%	35%
Jan-Dec								
Seaside	56%	57%	60%	61%	47%	45%	50%	47%
City/large town	73%	73%	77%	78%	55%	55%	57%	57%
Small town	61%	63%	65%	65%	42%	44%	45%	46%
Countryside	57%	55%	59%	58%	44%	44%	46%	45%
Past 12 months								
Seaside	56%	57%	60%	61%	47%	45%	50%	47%
City/large town	73%	73%	77%	78%	55%	55%	57%	57%
Small town	61%	63%	65%	65%	42%	44%	45%	46%
Countryside	57%	55%	59%	58%	44%	44%	46%	45%

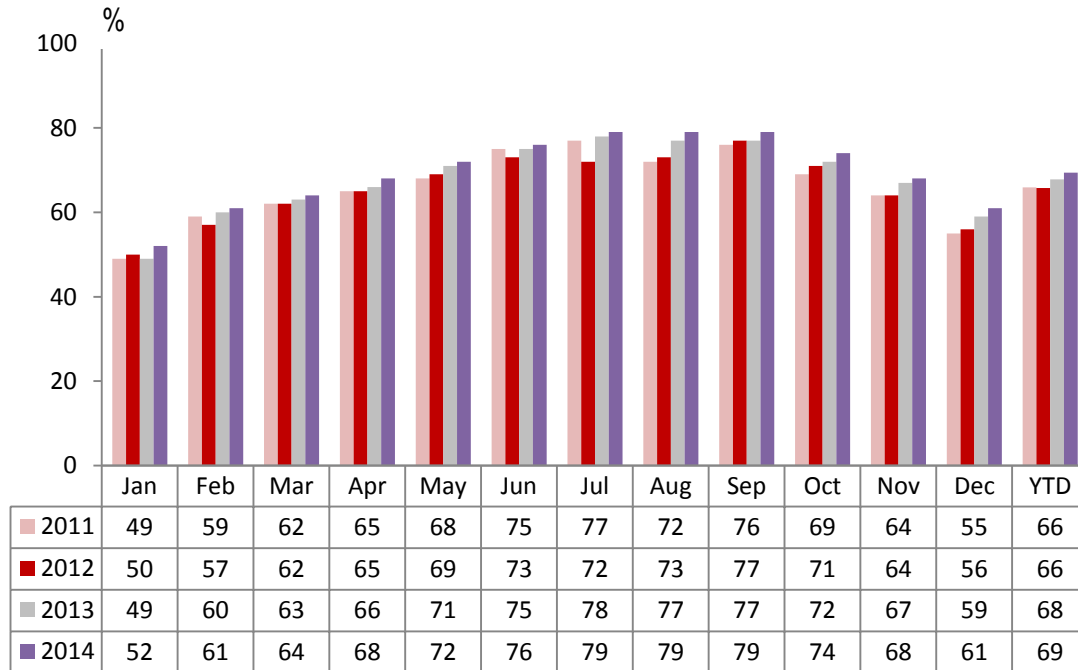
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
December								
Hotel	59%	59%	62%	65%	46%	45%	46%	48%
Guesthouse	36%	42%	40%	40%	26%	33%	29%	29%
B&B	33%	32%	35%	37%	23%	23%	25%	29%
Jan-Dec								
Hotel	69%	69%	72%	73%	52%	52%	54%	54%
Guesthouse	54%	54%	54%	55%	43%	43%	42%	43%
B&B	49%	48%	49%	51%	37%	38%	38%	40%
Past 12 months								
Hotel	69%	69%	72%	73%	52%	52%	54%	54%
Guesthouse	54%	54%	54%	55%	43%	43%	42%	43%
B&B	49%	48%	49%	51%	37%	38%	38%	40%

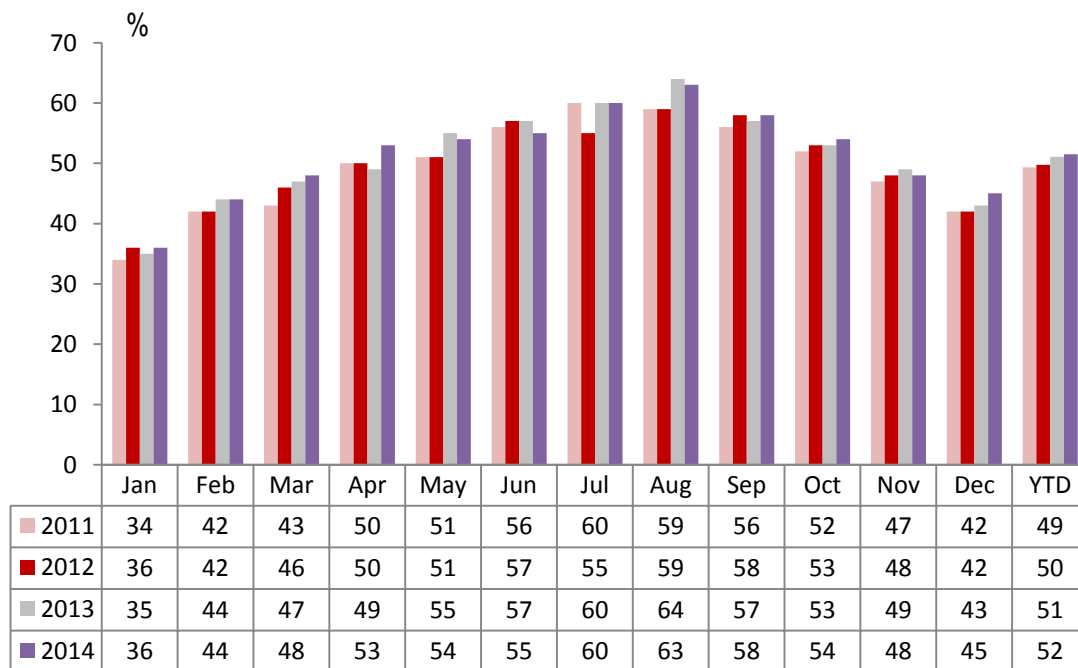
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
December								
1-3 rooms	25%	24%	25%	29%	18%	19%	19%	21%
4-10 rooms	32%	32%	34%	36%	23%	24%	25%	26%
11-25 rooms	45%	45%	51%	52%	32%	32%	35%	38%
26-50 rooms	49%	54%	58%	58%	38%	41%	44%	44%
51-100 rooms	60%	59%	56%	57%	49%	47%	45%	45%
100+ rooms	64%	65%	68%	71%	47%	47%	48%	50%
Jan-Dec								
1-3 rooms	41%	40%	41%	43%	33%	33%	33%	35%
4-10 rooms	49%	48%	50%	51%	39%	38%	39%	40%
11-25 rooms	57%	56%	59%	61%	44%	43%	44%	46%
26-50 rooms	62%	65%	69%	69%	48%	50%	54%	53%
51-100 rooms	69%	70%	69%	66%	53%	55%	54%	53%
100+ rooms	75%	74%	76%	78%	53%	52%	54%	55%
Past 12 months								
1-3 rooms	41%	40%	41%	43%	33%	33%	33%	35%
4-10 rooms	49%	48%	50%	51%	39%	38%	39%	40%
11-25 rooms	57%	56%	59%	61%	44%	43%	44%	46%
26-50 rooms	62%	65%	69%	69%	48%	50%	54%	53%
51-100 rooms	69%	70%	69%	66%	53%	55%	54%	53%
100+ rooms	75%	74%	76%	78%	53%	53%	54%	55%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
December								
East Midlands	51%	53%	56%	56%	34%	35%	39%	39%
Yorkshire	50%	52%	55%	57%	38%	38%	40%	41%
London	74%	74%	76%	78%	59%	58%	59%	59%
North West	49%	52%	54%	56%	36%	38%	39%	40%
East of England	51%	52%	57%	59%	40%	40%	42%	43%
West Midlands	50%	52%	54%	59%	36%	37%	38%	41%
South West	45%	45%	47%	51%	35%	34%	35%	39%
South East	50%	52%	56%	59%	38%	39%	38%	44%
North East	47%	39%	42%	51%	34%	28%	28%	35%
Jan-Dec								
East Midlands	62%	63%	65%	64%	41%	43%	45%	45%
Yorkshire	60%	60%	64%	67%	44%	45%	48%	49%
London	82%	80%	82%	82%	64%	62%	64%	63%
North West	56%	58%	61%	61%	41%	42%	44%	43%
East of England	61%	61%	64%	67%	48%	47%	48%	50%
West Midlands	63%	63%	65%	68%	45%	45%	46%	49%
South West	61%	60%	62%	64%	47%	47%	48%	49%
South East	63%	65%	68%	70%	47%	48%	51%	50%
North East	65%	56%	58%	59%	47%	41%	41%	42%
Past 12 months								
East Midlands	62%	63%	65%	64%	41%	43%	45%	45%
Yorkshire	60%	60%	64%	67%	44%	45%	48%	49%
London	82%	80%	82%	82%	64%	62%	64%	63%
North West	56%	58%	61%	61%	41%	42%	44%	43%
East of England	61%	61%	64%	67%	48%	47%	48%	50%
West Midlands	63%	63%	65%	68%	45%	45%	46%	49%
South West	61%	60%	62%	64%	47%	47%	48%	49%
South East	63%	65%	68%	70%	47%	48%	51%	50%
North East	65%	56%	58%	59%	47%	41%	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.