

England Occupancy Survey - February 2014

SUMMARY OF RESULTS

- Room occupancy in February remained broadly flat compared with the same period in 2013 (+1%), at 61%, with bedspace occupancy also flat (0%) at 44%.
- Both weekday and weekend room occupancy in February have increased slightly against last year's figures (up 2% to 64% for weekday and up 2% to 56% for weekend occupancy). For bedspace, weekday occupancy remained flat (at 42%) with weekend occupancy also broadly flat (+1% to 46%).
- City/large town locations saw the biggest uplift in room occupancy in February (up 4% to 72%), with bedspace occupancy also up (+2% to 53%). Occupancy levels in small towns and countryside locations remained flat, whilst bedspace occupancy in seaside locations dropped by -3%, to 29%.
- Looking at occupancy by establishment type, hotel and B&B occupancy remained flat for both room and bedspace, whilst guesthouse occupancy dropped by -3% for room and -2% for bedspace.
- When looking at occupancy figures for February by number of rooms, the 51-100 room category saw the greatest declines for both room and bedspace occupancy (-8% for room and -8% for bedspace). There were slight increases in the 1-3 and 100+ room categories (+2% for each respectively for both room and bed occupancy), whilst the remaining categories remained flat.
- The East of England, South East and the West Midlands saw the largest increases in room occupancy when compared to February last year (up +6%, +4% and +3% respectively), whilst the East of England and the West Midlands saw uplifts in bedspace occupancy (+3% and +2%). The East Midlands saw a slight decline in both room and bedspace occupancy (-2% and -3%), with room occupancy was also down slightly in the North East (-2%).

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
February	60%	61%	+1%	44%	44%	0%
Jan-Feb	55%	56%	+1%	39%	40%	+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	% +/-
February	53%	51%	-2%	39%	36%	-3%
Jan-Feb	48%	48%	0%	34%	32%	-2%
Past 12 months	61%	63%	+2%	47%	49%	+2%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
February								
Weekday	62%	61%	62%	64%	41%	40%	42%	42%
Weekend	53%	53%	54%	56%	43%	44%	45%	46%
Jan - Feb								
Weekday	58%	57%	58%	60%	38%	37%	38%	40%
Weekend	47%	49%	48%	50%	38%	39%	39%	41%
Past 12 months								
Weekday	61%	68%	68%	70%	43%	47%	47%	48%
Weekend	60%	63%	63%	65%	50%	53%	53%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
February								
Seaside	41%	43%	44%	44%	33%	31%	32%	29%
City/large town	68%	65%	68%	72%	50%	47%	51%	53%
Small town	56%	55%	58%	58%	36%	37%	40%	40%
Countryside	47%	47%	47%	48%	32%	37%	35%	35%
Jan - Feb								
Seaside	38%	39%	40%	42%	28%	28%	27%	26%
City/large town	63%	62%	62%	67%	47%	45%	46%	48%
Small town	50%	51%	51%	53%	32%	33%	34%	36%
Countryside	41%	42%	42%	44%	26%	31%	30%	31%
Past 12 months								
Seaside	54%	56%	58%	60%	44%	47%	45%	49%
City/large town	71%	72%	73%	77%	52%	55%	55%	57%
Small town	55%	61%	63%	65%	44%	43%	44%	45%
Countryside	53%	57%	53%	59%	42%	44%	44%	46%

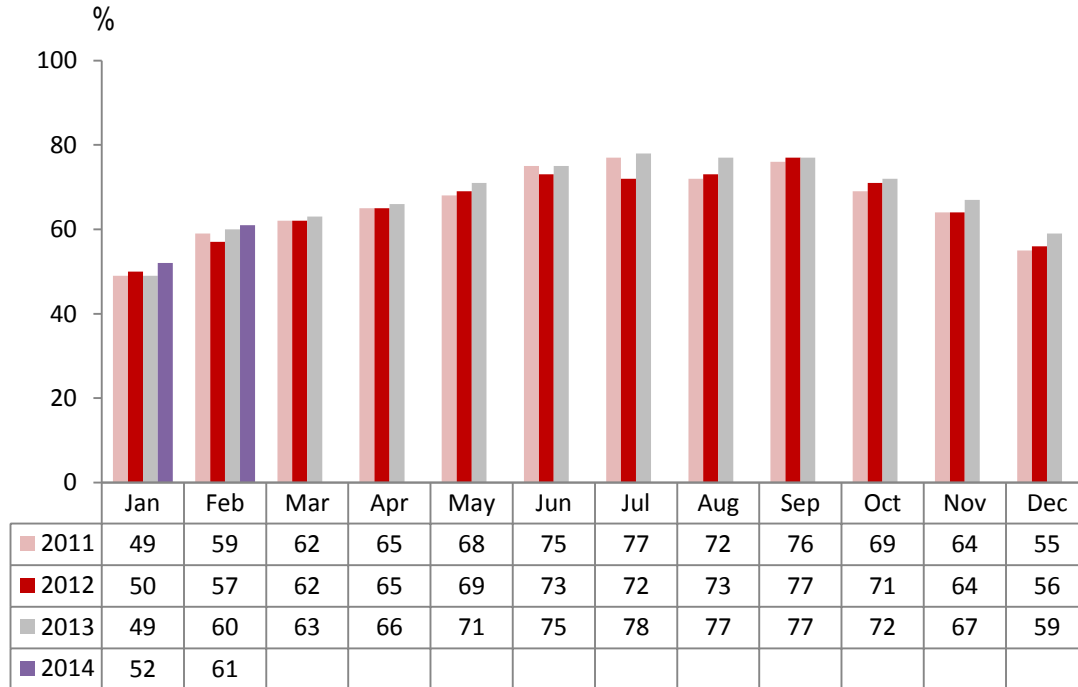
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
February								
Hotel	63%	62%	65%	66%	45%	45%	48%	47%
Guesthouse	40%	38%	42%	39%	30%	27%	31%	29%
B&B	39%	35%	35%	35%	28%	24%	24%	25%
Jan - Feb								
Hotel	57%	58%	59%	60%	41%	42%	42%	43%
Guesthouse	36%	33%	38%	35%	26%	23%	27%	25%
B&B	34%	31%	31%	31%	23%	21%	21%	22%
Past 12 months								
Hotel	65%	69%	70%	72%	50%	52%	52%	54%
Guesthouse	53%	53%	54%	54%	41%	42%	44%	42%
B&B	48%	48%	49%	49%	37%	37%	38%	38%

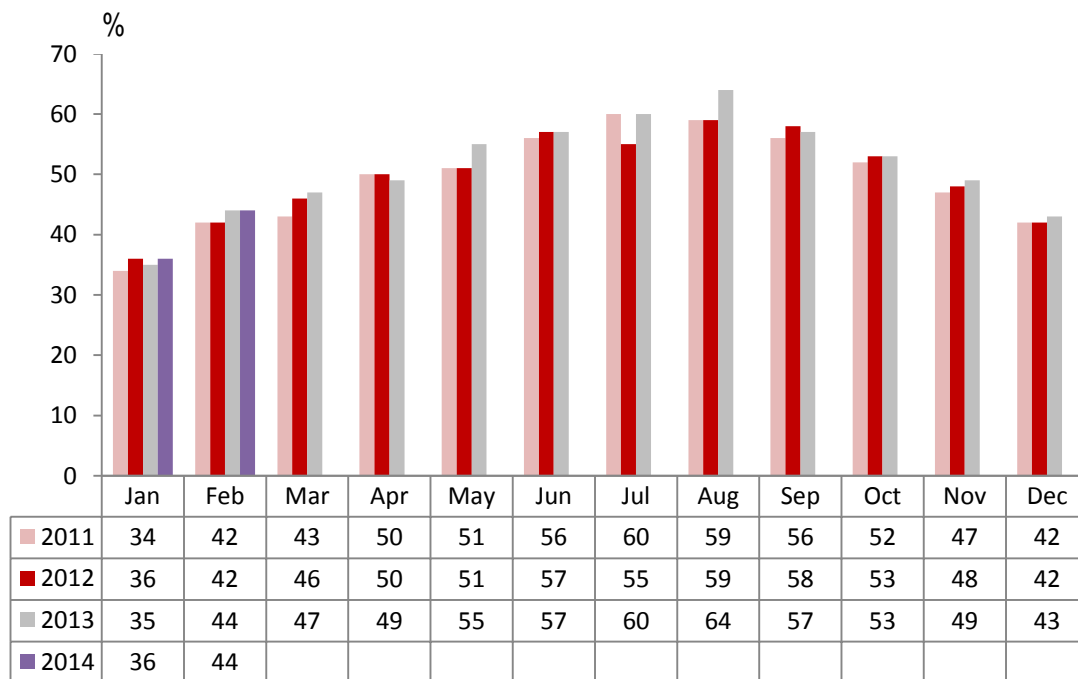
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
February								
1-3 rooms	29%	27%	25%	27%	21%	19%	18%	20%
4-10 rooms	36%	34%	33%	33%	26%	24%	23%	23%
11-25 rooms	48%	43%	46%	47%	35%	30%	32%	33%
26-50 rooms	55%	52%	60%	61%	39%	39%	46%	44%
51-100 rooms	63%	64%	65%	57%	45%	45%	51%	43%
100+ rooms	69%	68%	71%	73%	49%	48%	50%	52%
Jan - Feb								
1-3 rooms	25%	23%	22%	24%	17%	16%	16%	18%
4-10 rooms	31%	30%	30%	30%	22%	20%	20%	20%
11-25 rooms	43%	39%	41%	44%	30%	26%	28%	30%
26-50 rooms	50%	49%	54%	55%	35%	36%	40%	39%
51-100 rooms	57%	59%	58%	54%	41%	43%	43%	38%
100+ rooms	64%	64%	65%	67%	45%	45%	45%	47%
Past 12 months								
1-3 rooms	41%	41%	40%	42%	32%	33%	33%	34%
4-10 rooms	50%	49%	48%	50%	40%	38%	38%	39%
11-25 rooms	56%	57%	57%	59%	44%	44%	43%	44%
26-50 rooms	63%	62%	66%	69%	48%	48%	51%	54%
51-100 rooms	68%	69%	70%	68%	53%	53%	55%	53%
100+ rooms	70%	74%	74%	76%	n/a	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
February								
East Midlands	58%	57%	60%	58%	37%	36%	43%	40%
Yorkshire	54%	52%	57%	59%	39%	38%	42%	43%
London	75%	74%	75%	75%	58%	53%	59%	58%
North West	51%	49%	54%	53%	35%	35%	38%	37%
East of England	55%	52%	54%	60%	40%	39%	40%	43%
West Midlands	61%	57%	62%	65%	42%	39%	43%	45%
South West	51%	49%	50%	50%	38%	37%	36%	36%
South East	54%	54%	56%	60%	37%	39%	40%	39%
North East	56%	50%	51%	49%	39%	34%	35%	35%
Jan - Feb								
East Midlands	54%	54%	54%	52%	33%	33%	36%	35%
Yorkshire	49%	47%	51%	53%	34%	34%	36%	38%
London	72%	71%	69%	70%	56%	53%	54%	54%
North West	47%	45%	50%	48%	32%	32%	34%	34%
East of England	49%	49%	48%	56%	35%	36%	35%	39%
West Midlands	55%	51%	55%	58%	37%	35%	37%	39%
South West	45%	45%	44%	47%	33%	32%	31%	34%
South East	49%	50%	52%	55%	34%	36%	35%	36%
North East	51%	43%	33%	43%	34%	29%	29%	30%
Past 12 months								
East Midlands	58%	62%	64%	64%	39%	41%	43%	44%
Yorkshire	57%	60%	61%	64%	42%	44%	46%	48%
London	80%	82%	80%	82%	64%	64%	62%	64%
North West	55%	56%	59%	60%	42%	41%	43%	44%
East of England	57%	61%	61%	64%	46%	48%	47%	48%
West Midlands	61%	62%	64%	65%	49%	44%	45%	46%
South West	58%	61%	60%	62%	47%	47%	46%	48%
South East	55%	63%	66%	69%	44%	48%	48%	51%
North East	51%	65%	57%	58%	36%	47%	41%	41%

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.