

England Occupancy Survey - March 2014

SUMMARY OF RESULTS

- Both room and bedspace occupancy in March showed slight increases, of +1%, rising to 64% for room and 48% for bedspace.
- Weekday occupancy in March increased for both room and bedspace occupancy when compared to the same period last year (up +3% to 68% for room and up +6% to 50% for bedspace). Weekend occupancy, on the other hand, saw declines for both room and bed occupancy (-2% and -6% respectively).
- Increases in weekday occupancy are being driven by city/large town locations – the only area to see increases in both room and bedspace occupancy in March (+2% for room and +3% for bed). Countryside locations saw the biggest declines in occupancy (down -4% for both room and bedspace occupancy).
- Looking at occupancy by establishment type, hotel and guesthouse occupancy remained flat for both room and bedspace, whilst B&B occupancy dropped by -3% for room and -2% for bedspace.
- When looking at occupancy figures for March by number of rooms, the 51-100 room category saw the greatest decline for room occupancy when compared to March last year (-10%), with the 11-25 room category showing the greatest increase (+4%). For bedspace, the 1-3 room category saw the biggest decline against March last year (-4%), with the 11-25 and 100+ room categories showing the only increases (+2% each).
- The East of England saw the greatest increase in room occupancy in March when compared with last year, up 12% to 67%, with the South West also seeing an increase in room occupancy (up +8% to 63%). The South East and the West Midlands saw the biggest declines (down -10% and -8% to 51% and 55% respectively). Looking at bedspace, there were increases in East of England (+3%), West Midlands (+3%), and the South East (+2%), with all other areas remaining broadly flat.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
March	63%	64%	+1%	47%	48%	+1%
Jan-Mar	58%	59%	+1%	42%	43%	+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	% +/-
March	57%	55%	-2%	44%	41%	-3%
Jan-Mar	51%	50%	-1%	37%	35%	-2%
Past 12 months	61%	62%	+1%	48%	47%	-1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
March								
Weekday	64%	66%	65%	68%	41%	43%	44%	50%
Weekend	56%	58%	60%	58%	45%	48%	50%	44%
Jan-Mar								
Weekday	60%	60%	60%	63%	39%	39%	40%	43%
Weekend	50%	52%	53%	53%	41%	42%	44%	42%
Past 12 months								
Weekday	62%	68%	68%	70%	43%	47%	47%	49%
Weekend	60%	64%	63%	65%	50%	53%	53%	53%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
March								
Seaside	44%	48%	50%	49%	34%	36%	39%	37%
City/large town	71%	71%	71%	73%	51%	53%	54%	57%
Small town	58%	60%	60%	59%	38%	41%	43%	41%
Countryside	51%	49%	52%	48%	34%	35%	40%	36%
Jan-Mar								
Seaside	40%	42%	43%	44%	30%	31%	31%	30%
City/large town	66%	65%	65%	68%	48%	48%	49%	50%
Small town	53%	54%	54%	55%	34%	36%	37%	38%
Countryside	44%	44%	46%	45%	29%	32%	34%	33%
Past 12 months								
Seaside	54%	56%	58%	59%	44%	47%	45%	44%
City/large town	71%	72%	73%	77%	53%	55%	55%	57%
Small town	57%	61%	63%	64%	44%	43%	44%	45%
Countryside	54%	57%	56%	59%	42%	44%	45%	46%

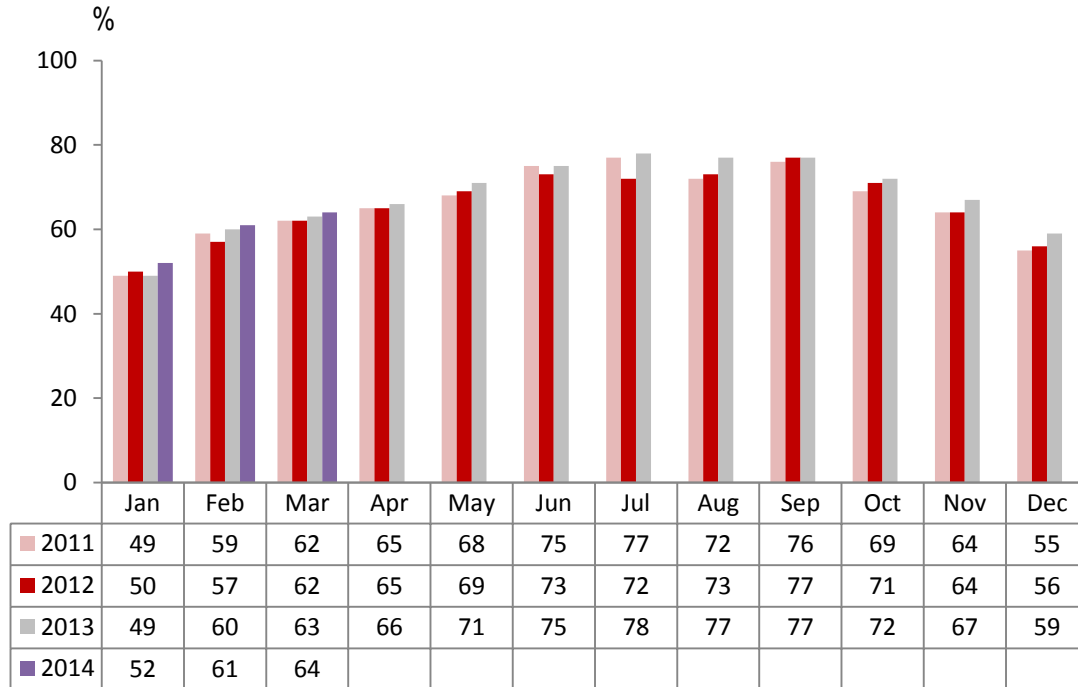
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
March								
Hotel	65%	67%	68%	68%	46%	49%	51%	51%
Guesthouse	44%	42%	45%	45%	30%	31%	34%	33%
B&B	40%	41%	41%	38%	29%	29%	30%	28%
Jan-Mar								
Hotel	60%	61%	62%	63%	43%	44%	45%	46%
Guesthouse	39%	36%	40%	39%	27%	26%	30%	28%
B&B	36%	34%	35%	34%	25%	24%	24%	24%
Past 12 months								
Hotel	65%	69%	70%	71%	50%	52%	52%	53%
Guesthouse	53%	53%	55%	54%	42%	42%	44%	42%
B&B	48%	48%	49%	49%	38%	37%	38%	38%

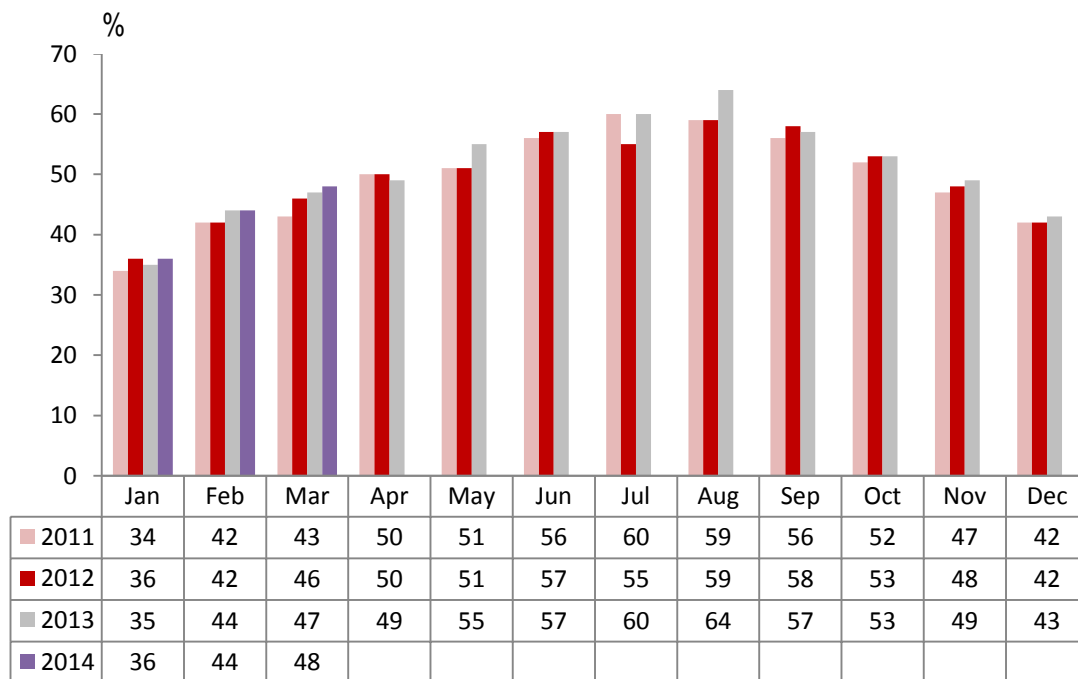
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
March								
1-3 rooms	31%	31%	33%	29%	23%	24%	25%	21%
4-10 rooms	39%	39%	39%	38%	27%	29%	30%	27%
11-25 rooms	49%	52%	49%	53%	36%	38%	36%	38%
26-30 rooms	58%	63%	65%	64%	41%	46%	49%	48%
51-100 rooms	65%	67%	70%	60%	44%	49%	58%	56%
100+ rooms	72%	72%	73%	75%	49%	50%	51%	53%
Jan-Mar								
1-3 rooms	27%	26%	26%	26%	19%	19%	19%	19%
4-10 rooms	34%	33%	33%	33%	27%	29%	24%	23%
11-25 rooms	45%	44%	44%	48%	36%	38%	31%	33%
26-30 rooms	53%	53%	58%	58%	41%	46%	43%	42%
51-100 rooms	60%	62%	62%	56%	44%	49%	48%	43%
100+ rooms	67%	67%	68%	70%	49%	50%	47%	49%
Past 12 months								
1-3 rooms	41%	41%	40%	41%	33%	33%	33%	33%
4-10 rooms	50%	49%	48%	50%	40%	39%	38%	39%
11-25 rooms	57%	57%	56%	59%	44%	44%	43%	45%
26-30 rooms	63%	63%	66%	69%	48%	49%	51%	54%
51-100 rooms	68%	69%	70%	66%	52%	53%	56%	53%
100+ rooms	74%	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
March								
East Midlands	61%	57%	61%	57%	38%	37%	45%	43%
Yorkshire	55%	55%	60%	61%	33%	40%	44%	45%
London	81%	78%	80%	80%	62%	60%	62%	62%
North West	50%	56%	57%	57%	34%	39%	41%	40%
East of England	56%	58%	55%	67%	42%	43%	41%	44%
West Midlands	64%	63%	63%	55%	44%	44%	45%	48%
South West	56%	55%	55%	63%	39%	42%	41%	40%
South East	55%	60%	61%	51%	38%	43%	44%	46%
North East	63%	52%	53%	51%	41%	36%	36%	36%
Jan-Mar								
East Midlands	56%	55%	57%	54%	35%	34%	39%	38%
Yorkshire	51%	50%	54%	56%	34%	36%	39%	40%
London	75%	74%	73%	73%	58%	55%	57%	56%
North West	48%	48%	52%	51%	33%	34%	36%	36%
East of England	52%	52%	51%	57%	37%	38%	37%	41%
West Midlands	58%	55%	57%	61%	40%	38%	40%	42%
South West	49%	48%	48%	49%	35%	36%	35%	36%
South East	51%	53%	55%	58%	35%	38%	38%	39%
North East	56%	45%	46%	46%	37%	31%	31%	37%
Past 12 months								
East Midlands	59%	62%	64%	65%	40%	41%	44%	44%
Yorkshire	57%	60%	61%	64%	41%	45%	46%	48%
London	80%	82%	80%	82%	65%	63%	62%	64%
North West	54%	57%	59%	60%	41%	41%	43%	44%
East of England	58%	61%	61%	65%	46%	48%	47%	48%
West Midlands	61%	62%	64%	66%	49%	44%	45%	47%
South West	59%	61%	60%	62%	47%	48%	46%	48%
South East	57%	63%	66%	68%	44%	48%	49%	48%
North East	52%	65%	57%	58%	37%	47%	41%	45%

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.