

## England Occupancy Survey - May 2014

### SUMMARY OF RESULTS

- Room occupancy in May showed a very slight increase, of +1%, rising to 72%, whilst bedspace occupancy showed a slight decrease, by -1% to 54%. Both measures of occupancy are up when looking at the year so far (+2% for room and +1% for bed).
- Weekday occupancy in May increased for both room and bedspace occupancy when compared to the same period last year (up +2% to 72% for room and up +1% to 50% for bedspace). Weekend occupancy, on the other hand, was flat for room and down slightly for bed occupancy (-1%).
- Room occupancy levels increased most in seaside and city/large town locations when compared to last year (+3% for each respectively). However, bedspace occupancy in seaside locations actually fell by -6% to 48%, with countryside locations the only area to see a slight decline for both room and bedspace occupancy (-1% for each).
- Looking at occupancy by establishment type, hotel and B&B occupancy increased slightly for room occupancy (+1%), with bedspace occupancy falling slightly for hotels and guesthouses (-1% and -2%).
- When looking at occupancy figures for May by number of rooms, the 11-25 room category saw increases for both room and bedspace occupancy (+4%), with the 100+ room category the only other category to see an increase for both measures (by +1% for both room and bed). The 1-3 room category saw a decline of -2% for both room and bedspace occupancy in May, whilst the 51-100 room category saw a decline of -1% for room and -3% for bed.
- Yorkshire, the West Midlands and the North West saw the greatest increases in room occupancy in May (+3%, +3% and +4%), with the North West also seeing the greatest increase in bedspace occupancy during the month (+3%). The biggest decline was seen in the South East, for bedspace occupancy, at -6% to 53%.

#### Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
<b>May</b>	71%	72%	+1%	55%	54%	-1%
Jan-May	62%	64%	+2%	46%	47%	+1%
Past 12 months	67%	68%	+1%	50%	51%	+1%

#### Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
<b>May</b>	66%	66%	0%	53%	51%	-2%
Jan-May	56%	56%	0%	42%	41%	-1%
Past 12 months	62%	62%	0%	48%	48%	0%

## Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>May</b>								
Weekday	70%	70%	70%	72%	47%	47%	49%	50%
Weekend	66%	67%	71%	71%	53%	56%	60%	59%
<b>Jan-May</b>								
Weekday	63%	63%	64%	66%	42%	42%	43%	46%
Weekend	57%	57%	58%	60%	46%	47%	48%	48%
<b>Past 12 months</b>								
Weekday	61%	68%	68%	71%	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
<b>May</b>								
Seaside	56%	58%	62%	65%	49%	44%	54%	48%
City/large town	75%	77%	78%	81%	54%	57%	59%	60%
Small town	63%	66%	67%	68%	44%	46%	48%	49%
Countryside	62%	60%	65%	64%	48%	46%	52%	51%
<b>Jan-May</b>								
Seaside	47%	48%	50%	52%	38%	35%	39%	37%
City/large town	69%	69%	69%	73%	51%	50%	52%	54%
Small town	55%	57%	58%	59%	37%	38%	40%	42%
Countryside	51%	49%	52%	52%	36%	37%	40%	39%
<b>Past 12 months</b>								
Seaside	55%	56%	58%	60%	45%	46%	46%	45%
City/large town	71%	73%	73%	77%	54%	55%	55%	57%
Small town	57%	61%	63%	65%	40%	43%	44%	46%
Countryside	54%	56%	57%	59%	42%	44%	45%	46%

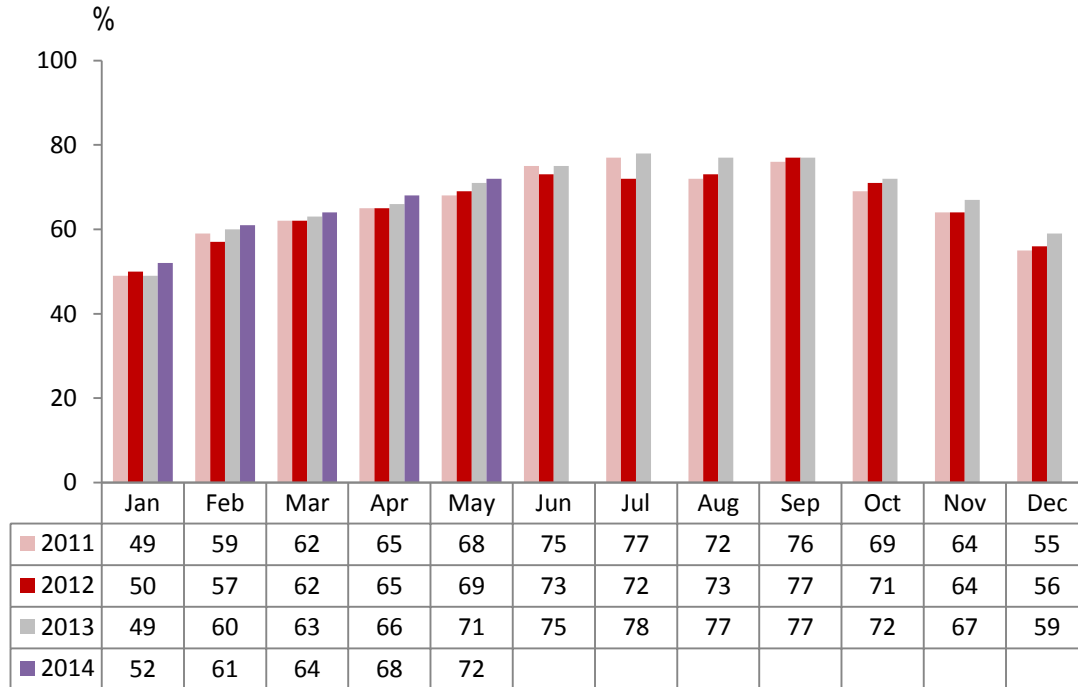
## Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>May</b>								
Hotel	71%	73%	74%	75%	52%	53%	57%	56%
Guesthouse	56%	57%	60%	60%	46%	46%	49%	47%
B&B	51%	53%	54%	55%	40%	41%	43%	44%
<b>Jan-May</b>								
Hotel	64%	65%	66%	67%	47%	48%	49%	50%
Guesthouse	46%	44%	45%	47%	35%	33%	35%	35%
B&B	42%	41%	41%	41%	31%	31%	30%	32%
<b>Past 12 months</b>								
Hotel	65%	69%	70%	72%	49%	52%	52%	53%
Guesthouse	54%	53%	54%	55%	42%	42%	44%	42%
B&B	48%	48%	49%	49%	38%	37%	38%	38%

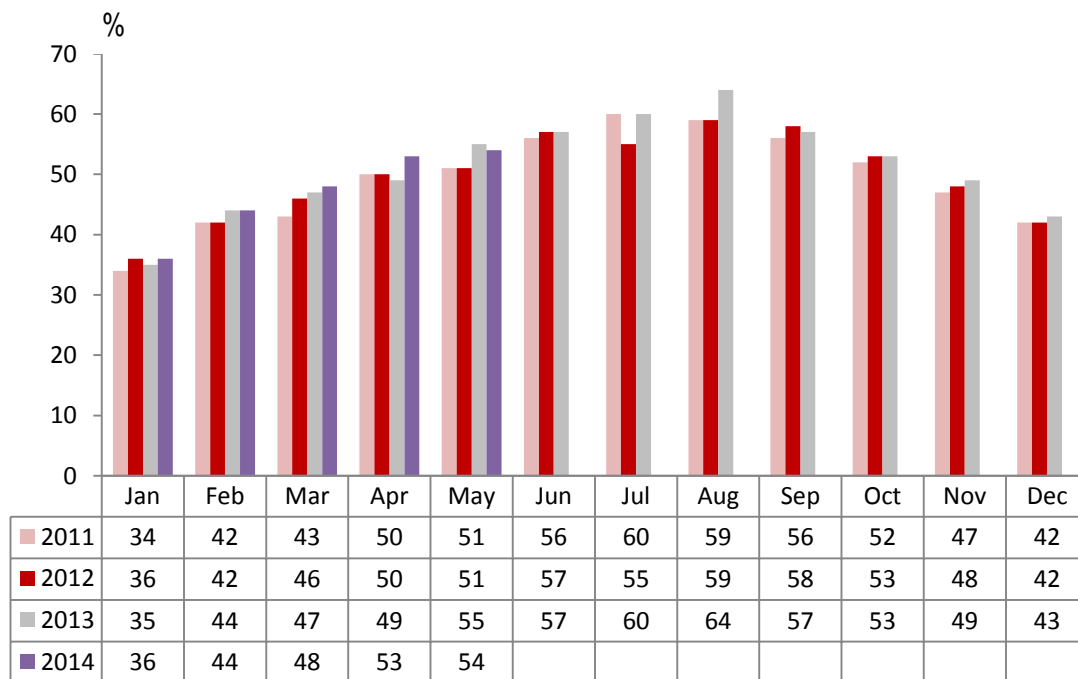
## Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>May</b>								
1-3 rooms	46%	45%	49%	47%	37%	37%	41%	39%
4-10 rooms	52%	50%	56%	56%	41%	39%	45%	45%
11-25 rooms	57%	56%	60%	64%	44%	42%	45%	49%
26-30 rooms	66%	71%	74%	73%	48%	52%	58%	58%
51-100 rooms	71%	75%	72%	71%	50%	57%	56%	53%
100+ rooms	77%	77%	79%	80%	54%	54%	57%	58%
<b>Jan-May</b>								
1-3 rooms	34%	33%	34%	34%	26%	25%	26%	27%
4-10 rooms	41%	39%	40%	41%	30%	29%	30%	31%
11-25 rooms	50%	49%	49%	54%	38%	35%	35%	39%
26-30 rooms	57%	58%	63%	63%	41%	44%	48%	48%
51-100 rooms	64%	66%	65%	60%	46%	50%	51%	47%
100+ rooms	70%	70%	71%	74%	49%	49%	51%	53%
<b>Past 12 months</b>								
1-3 rooms	41%	40%	41%	41%	33%	32%	33%	33%
4-10 rooms	50%	48%	48%	50%	39%	38%	38%	39%
11-25 rooms	57%	57%	56%	61%	44%	43%	43%	46%
26-30 rooms	63%	63%	67%	69%	48%	49%	52%	54%
51-100 rooms	68%	70%	70%	66%	51%	54%	55%	53%
100+ rooms	80%	74%	74%	77%	n/a	n/a	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
<b>May</b>								
East Midlands	63%	65%	66%	68%	41%	43%	46%	47%
Yorkshire	62%	63%	67%	70%	40%	45%	52%	53%
London	85%	83%	85%	84%	65%	65%	67%	66%
North West	55%	57%	58%	62%	38%	40%	42%	45%
East of England	62%	66%	65%	67%	48%	50%	50%	52%
West Midlands	65%	67%	67%	70%	46%	47%	49%	51%
South West	66%	62%	66%	67%	51%	48%	53%	53%
South East	66%	71%	74%	75%	53%	52%	59%	53%
North East	70%	63%	66%	67%	50%	46%	49%	51%
<b>Jan-May</b>								
East Midlands	59%	58%	59%	59%	37%	38%	41%	41%
Yorkshire	55%	54%	58%	61%	37%	39%	43%	45%
London	78%	77%	77%	77%	61%	59%	60%	60%
North West	50%	53%	54%	55%	35%	36%	38%	40%
East of England	55%	55%	55%	60%	41%	42%	42%	45%
West Midlands	60%	59%	61%	64%	42%	41%	43%	46%
South West	55%	53%	54%	55%	41%	40%	40%	42%
South East	57%	59%	61%	64%	42%	43%	45%	44%
North East	60%	51%	53%	53%	41%	36%	37%	39%
<b>Past 12 months</b>								
East Midlands	60%	62%	64%	64%	40%	42%	44%	45%
Yorkshire	56%	60%	62%	65%	39%	45%	47%	49%
London	84%	82%	80%	82%	71%	63%	63%	64%
North West	52%	57%	59%	61%	40%	41%	43%	44%
East of England	57%	61%	61%	65%	46%	48%	47%	49%
West Midlands	60%	62%	64%	66%	49%	44%	46%	47%
South West	59%	61%	60%	62%	47%	47%	47%	48%
South East	57%	63%	66%	68%	42%	48%	49%	48%
North East	55%	64%	57%	58%	39%	46%	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.