

England Occupancy Survey - November 2014

SUMMARY OF RESULTS

- Room occupancy in November was up +1%, rising to 68%, with bedspace occupancy down -1% to 48%. Looking at the year to date, room occupancy is up +1%, with bedspace flat (0%).
- Weekday occupancy in November was up for both room and bedspace occupancy (+1% and +1%), with weekend occupancy flat for room and down -1% for bedspace.
- Seaside occupancy was down -2% for room and -6% for bedspace, with occupancy levels in small towns down -2% for room and flat (0%) for bed occupancy. City/large towns were up +1% for room and again flat for bed (0%), with countryside down -1% for both room and bedspace occupancy.
- Looking at occupancy by establishment type, B&B's saw increases of +4% for room and +5% for bedspace occupancy, with hotels up +2% for room and down -1% for bedspace. Guesthouses were down -1% for both room and bedspace occupancy.
- Looking at number of rooms, only the 1-3, 26-50 and 100+ room categories saw increases in both measures, with the 51-100 room category witnessing the biggest declines (-3% for room and -5% for bed).
- Looking at room occupancy, the East of England saw the biggest increase this month (+3%), along with the North East (+3%), with the East Midlands seeing the biggest decrease (-4%). For bedspace occupancy most of the regions had seen a decline against the same month last year, apart from the West Midlands (+3%), the East of England (+1%) and the South West (+1%).

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
November	67%	68%	+1%	49%	48%	-1%
Jan-Nov	69%	70%	+1%	52%	52%	0%
Past 12 months	68%	69%	+1%	51%	51%	0%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
November	59%	57%	-2%	42%	40%	-2%
Jan-Nov	64%	63%	-1%	50%	48%	-2%
Past 12 months	63%	62%	-1%	49%	47%	-2%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
November								
Weekday	66%	66%	70%	71%	44%	44%	45%	46%
Weekend	60%	61%	64%	64%	51%	50%	52%	51%
Jan-Nov								
Weekday	70%	68%	71%	72%	48%	47%	49%	50%
Weekend	64%	64%	66%	67%	53%	53%	55%	54%
Past 12 months								
Weekday	68%	67%	70%	71%	47%	46%	48%	49%
Weekend	63%	63%	65%	66%	52%	52%	54%	53%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
November								
Seaside	49%	51%	55%	53%	37%	39%	42%	36%
City/large town	72%	73%	79%	80%	54%	58%	57%	57%
Small town	56%	61%	64%	62%	40%	41%	43%	43%
Countryside	53%	50%	51%	50%	39%	37%	37%	36%
Jan-Nov								
Seaside	57%	58%	61%	62%	48%	46%	51%	48%
City/large town	74%	73%	78%	79%	55%	56%	58%	58%
Small town	62%	64%	66%	66%	43%	45%	46%	46%
Countryside	59%	56%	61%	59%	45%	45%	47%	46%
Past 12 months								
Seaside	56%	57%	60%	61%	46%	45%	50%	47%
City/large town	73%	72%	77%	78%	55%	55%	57%	57%
Small town	60%	62%	65%	65%	42%	44%	45%	46%
Countryside	57%	55%	59%	58%	44%	44%	46%	45%

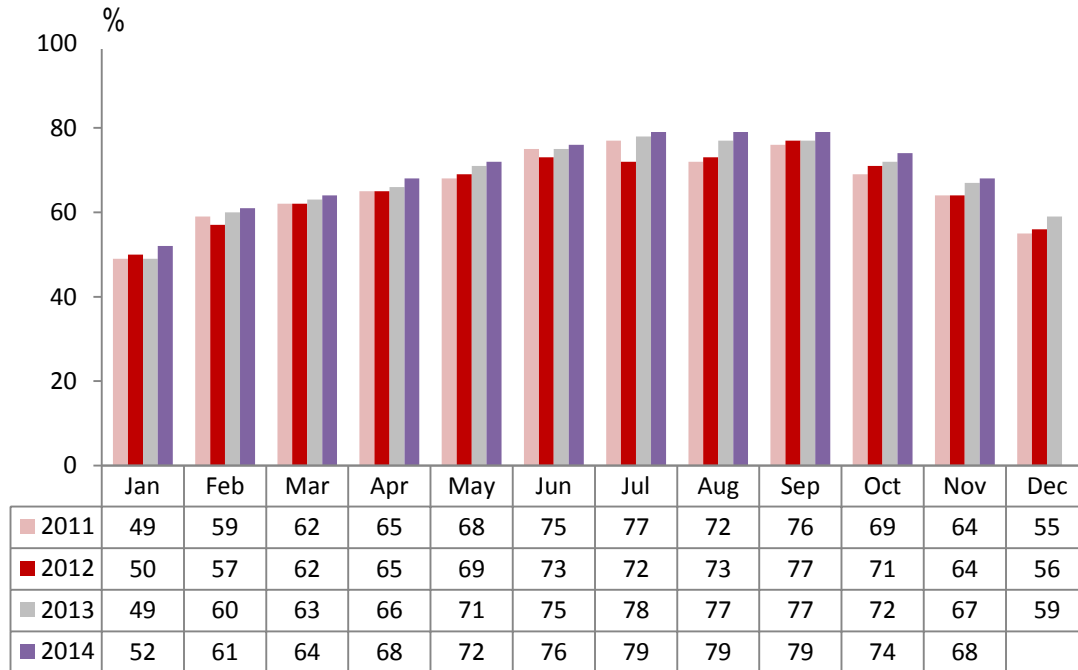
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
November								
Hotel	68%	69%	71%	73%	50%	52%	52%	51%
Guesthouse	43%	46%	47%	46%	31%	34%	34%	33%
B&B	39%	39%	39%	43%	27%	28%	27%	32%
Jan-Nov								
Hotel	70%	70%	73%	73%	52%	52%	55%	54%
Guesthouse	55%	55%	55%	56%	44%	44%	43%	43%
B&B	50%	50%	50%	52%	39%	39%	39%	41%
Past 12 months								
Hotel	69%	69%	72%	73%	51%	52%	54%	54%
Guesthouse	54%	54%	54%	55%	43%	43%	43%	43%
B&B	48%	48%	49%	51%	37%	37%	38%	40%

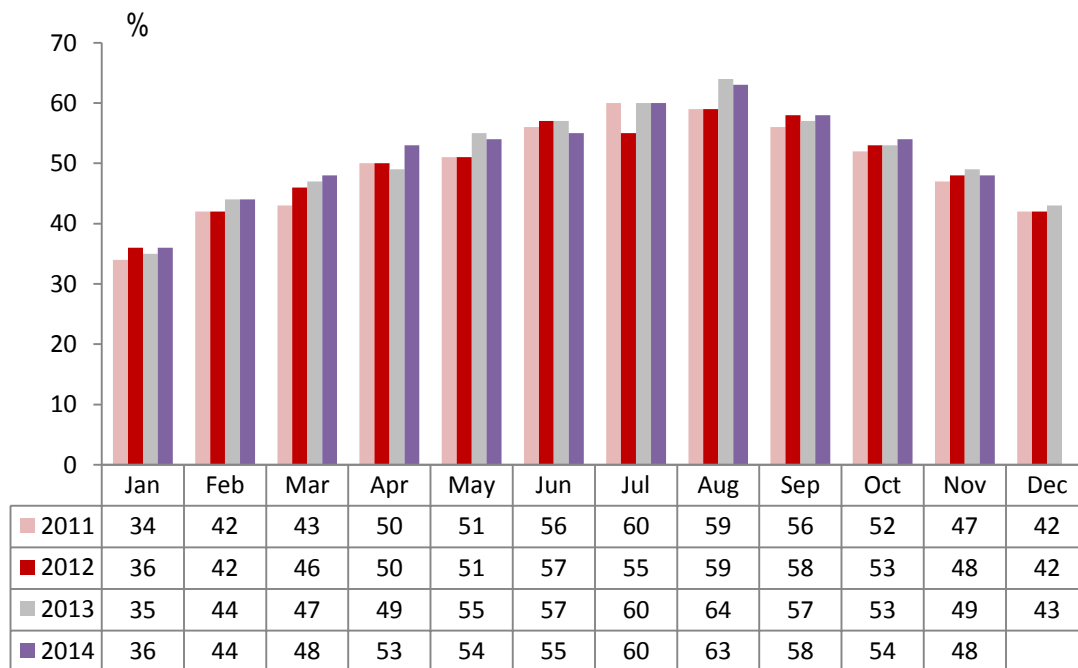
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
November								
1-3 rooms	30%	29%	33%	35%	21%	22%	24%	25%
4-10 rooms	38%	37%	41%	41%	27%	27%	30%	29%
11-25 rooms	52%	53%	57%	57%	37%	36%	41%	40%
26-50 rooms	56%	64%	66%	67%	44%	48%	48%	49%
51-100 rooms	69%	68%	66%	63%	54%	60%	47%	42%
100+ rooms	76%	75%	78%	79%	52%	53%	54%	55%
Jan-Nov								
1-3 rooms	43%	41%	43%	44%	34%	34%	35%	36%
4-10 rooms	51%	49%	51%	52%	40%	39%	40%	41%
11-25 rooms	58%	57%	59%	62%	45%	44%	45%	47%
26-50 rooms	63%	66%	70%	70%	49%	51%	55%	54%
51-100 rooms	70%	71%	70%	67%	53%	56%	55%	53%
100+ rooms	75%	75%	77%	79%	53%	53%	55%	56%
Past 12 months								
1-3 rooms	41%	40%	41%	43%	32%	32%	33%	35%
4-10 rooms	49%	48%	50%	51%	39%	38%	39%	40%
11-25 rooms	57%	56%	58%	61%	44%	43%	44%	46%
26-50 rooms	62%	64%	69%	69%	47%	50%	54%	53%
51-100 rooms	69%	70%	69%	66%	53%	55%	54%	52%
100+ rooms	74%	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
November								
East Midlands	59%	64%	65%	61%	38%	41%	44%	43%
Yorkshire	58%	60%	64%	65%	42%	44%	47%	46%
London	84%	83%	83%	84%	64%	63%	63%	63%
North West	58%	60%	63%	63%	40%	42%	45%	44%
East of England	57%	60%	67%	70%	44%	44%	48%	49%
West Midlands	65%	65%	70%	72%	44%	45%	48%	51%
South West	54%	53%	55%	57%	39%	40%	41%	42%
South East	58%	61%	65%	65%	41%	42%	46%	43%
North East	63%	49%	53%	56%	42%	35%	36%	36%
Jan-Nov								
East Midlands	63%	64%	66%	65%	42%	44%	45%	46%
Yorkshire	62%	61%	65%	67%	45%	46%	49%	50%
London	83%	81%	82%	82%	65%	62%	64%	63%
North West	57%	58%	61%	62%	41%	43%	44%	45%
East of England	62%	62%	64%	67%	48%	48%	48%	50%
West Midlands	64%	64%	66%	69%	46%	45%	47%	49%
South West	63%	61%	63%	65%	49%	48%	49%	50%
South East	64%	67%	70%	71%	48%	49%	52%	51%
North East	66%	58%	60%	59%	48%	42%	43%	42%
Past 12 months								
East Midlands	62%	63%	65%	64%	41%	43%	45%	45%
Yorkshire	60%	60%	64%	66%	44%	45%	48%	49%
London	83%	80%	82%	82%	64%	62%	64%	63%
North West	56%	58%	61%	61%	41%	42%	44%	44%
East of England	61%	61%	63%	67%	47%	47%	48%	50%
West Midlands	63%	63%	65%	68%	45%	45%	46%	48%
South West	61%	60%	62%	64%	47%	47%	48%	49%
South East	63%	65%	68%	70%	47%	48%	51%	50%
North East	66%	56%	58%	58%	47%	41%	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.