

England Occupancy Survey - April 2015

SUMMARY OF RESULTS

- Room occupancy in April remained flat (remaining at 68%), with bedspace occupancy down -3% to 50%.
- Weekday occupancy saw a -1% change for room occupancy and a -3% change for bedspace occupancy. Looking at weekend, both room and bedspace occupancy declined by -2%.
- Seaside occupancy in April was up +3% to 61%, with bedspace occupancy down -3% to 44%. City/large town locations declined for room occupancy (-2% to 76%) and for bedspace (-3% to 56%). Both countryside and small towns also saw slight decreases for room and bedspace, with small towns showing a -1% change for room and -2% for bed, and countryside showing a -1% change for room and remaining flat for bedspace (0%).
- Looking at occupancy by establishment type, B&B's saw occupancy increase by +2% for room and +1% for bed. Both hotels and guesthouses saw declines for both room and bedspace occupancy, by -3% and -3% respectively for room, and -1% and -3% respectively for bed.
- Looking at number of rooms, and by room occupancy, the 1-3 room category was up +3% in April, as was the 4-10 (+2%) and 51-100 (+4%). The rest saw declines, the greatest of which was the 26-30 room category which fell by -6% compared with April last year. Bedspace occupancy also saw declines across all categories, apart from the 1-3 room category which increased marginally by +1%.
- Looking at occupancy by region, only the West Midlands and the South West saw increases in room occupancy this month (+2% for each respectively). The remaining regions either remained unchanged or saw declines, with bedspace occupancy flat for the South West and showing declines for all remaining regions.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
April	68%	68%	0%	53%	50%	-3%
Jan-Apr	61%	62%	+1%	45%	46%	+1%
Past 12 months	68%	70%	+2%	51%	52%	+1%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
April	61%	61%	0%	47%	46%	-1%
Jan-Apr	53%	53%	0%	38%	39%	+1%
Past 12 months	62%	63%	+1%	48%	48%	0%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
April								
Weekday	65%	67%	69%	68%	45%	46%	50%	47%
Weekend	64%	61%	67%	65%	54%	50%	56%	54%
Jan-Apr								
Weekday	61%	62%	64%	66%	41%	42%	45%	44%
Weekend	55%	55%	57%	57%	45%	45%	45%	47%
Past 12 months								
Weekday	68%	68%	70%	72%	47%	47%	49%	49%
Weekend	63%	63%	65%	66%	53%	53%	53%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
April								
Seaside	53%	53%	58%	61%	41%	42%	47%	44%
City/large town	74%	74%	78%	76%	56%	56%	59%	56%
Small town	59%	61%	64%	63%	43%	42%	47%	45%
Countryside	55%	57%	58%	57%	45%	44%	44%	44%
Jan-Apr								
Seaside	45%	46%	48%	49%	34%	35%	34%	39%
City/large town	67%	67%	71%	72%	50%	51%	53%	52%
Small town	55%	56%	57%	59%	38%	38%	40%	41%
Countryside	47%	49%	48%	50%	36%	36%	36%	37%
Past 12 months								
Seaside	56%	58%	60%	61%	47%	45%	45%	48%
City/large town	73%	73%	77%	78%	55%	55%	57%	57%
Small town	61%	63%	65%	65%	43%	44%	45%	46%
Countryside	57%	56%	59%	59%	44%	44%	46%	45%

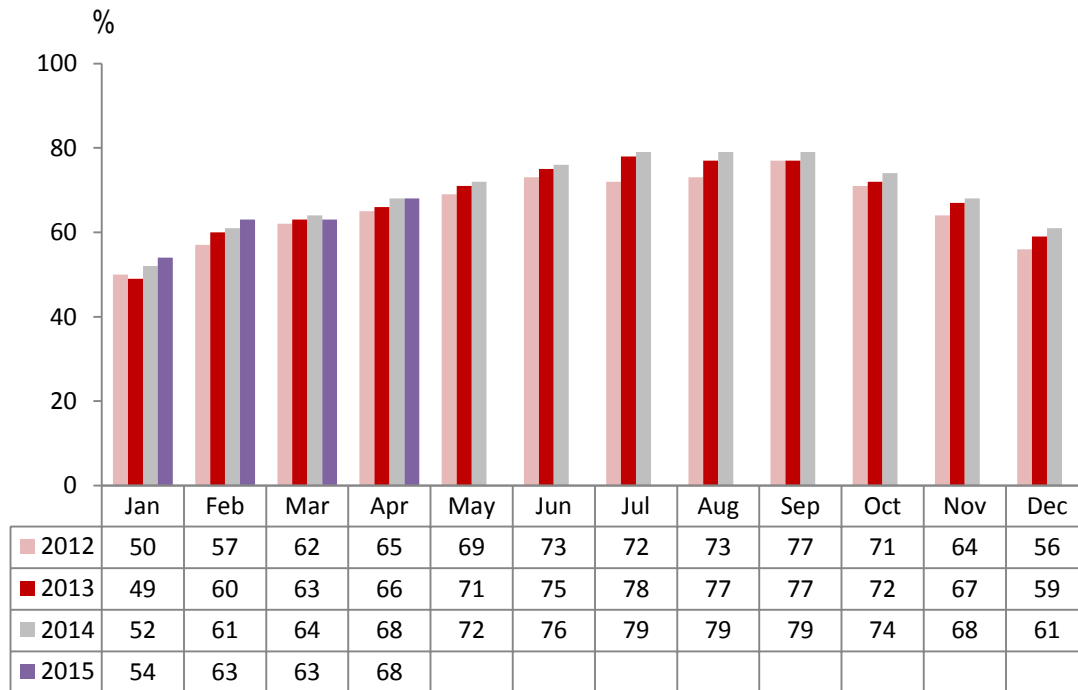
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
April								
Hotel	68%	70%	72%	71%	52%	53%	55%	52%
Guesthouse	52%	46%	53%	50%	41%	36%	42%	39%
B&B	48%	45%	48%	50%	40%	34%	38%	39%
Jan-Apr								
Hotel	63%	64%	65%	66%	46%	47%	48%	48%
Guesthouse	40%	42%	43%	43%	30%	31%	32%	32%
B&B	38%	37%	38%	41%	28%	27%	28%	31%
Past 12 months								
Hotel	69%	70%	71%	73%	52%	52%	53%	53%
Guesthouse	53%	54%	55%	55%	42%	43%	43%	43%
B&B	48%	48%	49%	52%	37%	37%	38%	41%

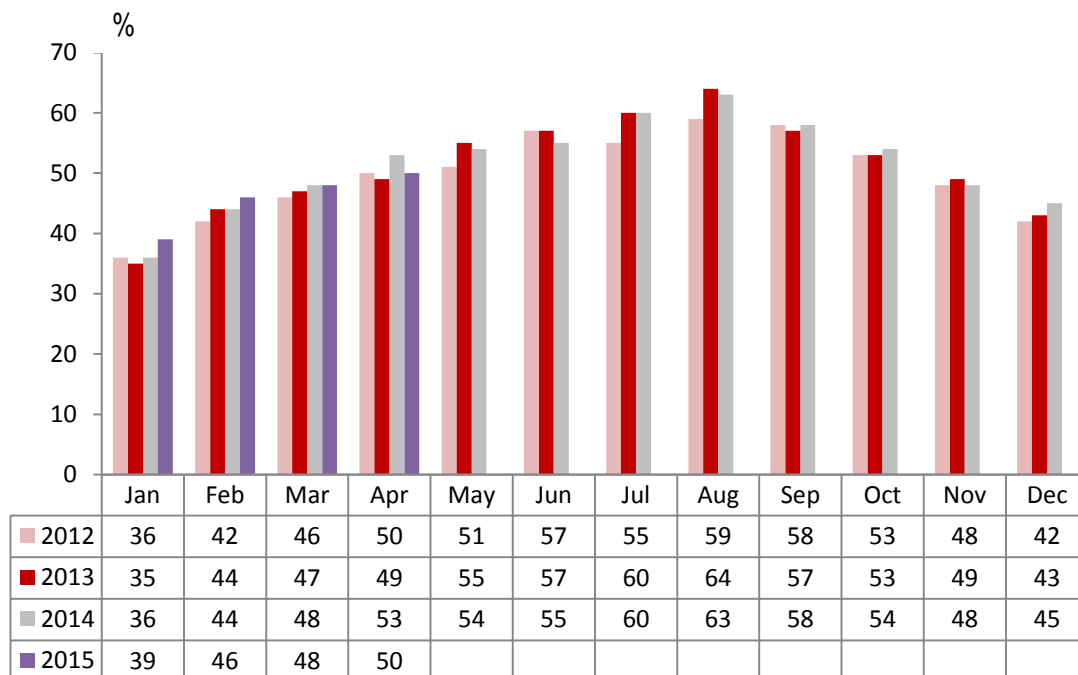
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
April								
1-3 rooms	39%	38%	41%	44%	32%	30%	34%	34%
4-10 rooms	45%	44%	47%	49%	36%	33%	37%	38%
11-25 rooms	55%	50%	61%	56%	42%	37%	46%	44%
26-30 rooms	65%	67%	68%	62%	49%	52%	53%	52%
51-100 rooms	69%	69%	65%	69%	57%	52%	56%	51%
100+ rooms	73%	76%	78%	77%	52%	54%	57%	54%
Jan-Apr								
1-3 rooms	29%	29%	30%	33%	22%	22%	23%	24%
4-10 rooms	36%	36%	37%	41%	27%	26%	27%	30%
11-25 rooms	47%	46%	51%	51%	34%	33%	36%	37%
26-30 rooms	56%	60%	61%	58%	42%	45%	45%	45%
51-100 rooms	64%	64%	58%	62%	48%	49%	45%	47%
100+ rooms	68%	70%	72%	73%	48%	49%	51%	51%
Past 12 months								
1-3 rooms	41%	40%	41%	44%	33%	33%	34%	35%
4-10 rooms	49%	48%	50%	53%	38%	38%	39%	42%
11-25 rooms	57%	56%	60%	61%	44%	43%	45%	46%
26-30 rooms	63%	67%	69%	68%	49%	52%	54%	53%
51-100 rooms	70%	70%	66%	68%	54%	55%	53%	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			
	2012	2013	2014	2015	2012	2013	2014	2015
April								
East Midlands	58%	61%	65%	59%	45%	41%	46%	45%
Yorkshire	58%	62%	66%	65%	43%	46%	51%	49%
London	83%	82%	83%	79%	64%	65%	66%	60%
North West	56%	56%	60%	60%	41%	39%	45%	43%
East of England	54%	58%	64%	64%	45%	45%	49%	46%
West Midlands	61%	66%	67%	69%	44%	48%	50%	49%
South West	58%	58%	61%	63%	45%	44%	48%	48%
South East	64%	65%	69%	69%	48%	48%	51%	49%
North East	57%	60%	58%	58%	41%	43%	44%	41%
Jan-Apr								
East Midlands	56%	58%	57%	56%	37%	39%	40%	40%
Yorkshire	52%	56%	58%	59%	38%	41%	43%	43%
London	76%	75%	76%	75%	57%	59%	59%	57%
North West	50%	53%	53%	56%	36%	37%	38%	39%
East of England	53%	53%	59%	60%	40%	39%	43%	42%
West Midlands	57%	60%	62%	65%	39%	42%	44%	45%
South West	51%	51%	52%	56%	38%	37%	39%	42%
South East	56%	58%	61%	61%	41%	41%	42%	45%
North East	48%	50%	49%	55%	35%	34%	36%	37%
Past 12 months								
East Midlands	62%	64%	64%	64%	41%	44%	44%	45%
Yorkshire	60%	62%	65%	67%	45%	46%	49%	49%
London	82%	80%	82%	82%	63%	62%	64%	62%
North West	57%	59%	61%	62%	41%	43%	44%	45%
East of England	61%	61%	65%	67%	48%	47%	49%	49%
West Midlands	62%	64%	66%	69%	44%	46%	47%	49%
South West	61%	60%	62%	65%	47%	46%	48%	50%
South East	63%	66%	68%	70%	48%	49%	48%	50%
North East	64%	57%	58%	61%	47%	41%	42%	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.