

England Occupancy Survey - February 2015

SUMMARY OF RESULTS

- Room occupancy in February was up +2% to 63%, with bedspace occupancy also up, by +2% to 46%.
- Weekday occupancy in February increased for both room and bedspace occupancy (+2% and +2%), with weekend occupancy also up slightly for both measures, (+1% for both room and bedspace).
- Occupancy levels were up across all location types for both room and bedspace, apart from cities and countryside which remained flat for bedspace occupancy. Seaside saw the biggest uplift compared to February last year (+7% and +10% respectively), although city/large town locations saw the highest occupancy levels overall.
- Looking at occupancy by establishment type, B&B's saw the biggest increases in occupancy, +4% for room and +3% for bed. Hotels and guesthouses also saw increases for both room and bedspace occupancy in February.
- Looking at number of rooms, increases are evident across most of the size categories, with only one category showing a decline for room occupancy (26-50 room, down -2%) and one category remaining flat for bedspace occupancy (100+ rooms, flat at 0%). The 4-10 room category saw the biggest uplift compared to February last year, with both room and bedspace occupancy up +6% and +5% respectively.
- Looking at occupancy by region, there were increases across most regions for the month, and on both measures, with no declines. The biggest increases in room occupancy were in the North East (+6%) and the South West (+5%), with the biggest increases in bedspace occupancy seen in the South East (+8%) and the South West (+5%).

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
February	61%	63%	+2%	44%	46%	+2%
Feb (Year to Date)	56%	59%	+3%	40%	42%	+2%
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	% +/-
February	51%	53%	+2%	36%	39%	+3%
Feb (Year to Date)	48%	49%	+1%	32%	34%	+2%
Past 12 months	63%	63%	0%	49%	48%	-1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
February								
Weekday	61%	62%	64%	66%	40%	42%	42%	44%
Weekend	53%	54%	56%	57%	44%	45%	46%	47%
Feb (Year to Date)								
Weekday	57%	58%	60%	63%	37%	38%	40%	41%
Weekend	49%	48%	50%	52%	39%	39%	41%	43%
Past 12 months								
Weekday	68%	68%	70%	72%	47%	47%	48%	50%
Weekend	63%	63%	65%	66%	53%	53%	54%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
February								
Seaside	43%	44%	44%	51%	31%	32%	29%	39%
City/large town	65%	68%	72%	73%	47%	51%	53%	53%
Small town	55%	58%	58%	60%	37%	40%	40%	41%
Countryside	47%	47%	48%	50%	37%	35%	35%	35%
Feb (Year to Date)								
Seaside	39%	40%	42%	47%	28%	27%	26%	34%
City/large town	62%	62%	67%	68%	45%	46%	48%	50%
Small town	51%	51%	53%	55%	33%	34%	36%	38%
Countryside	42%	42%	44%	45%	31%	30%	31%	31%
Past 12 months								
Seaside	56%	58%	60%	62%	47%	45%	49%	48%
City/large town	72%	73%	77%	78%	55%	55%	57%	58%
Small town	61%	63%	65%	65%	43%	44%	45%	46%
Countryside	57%	53%	59%	59%	44%	44%	46%	45%

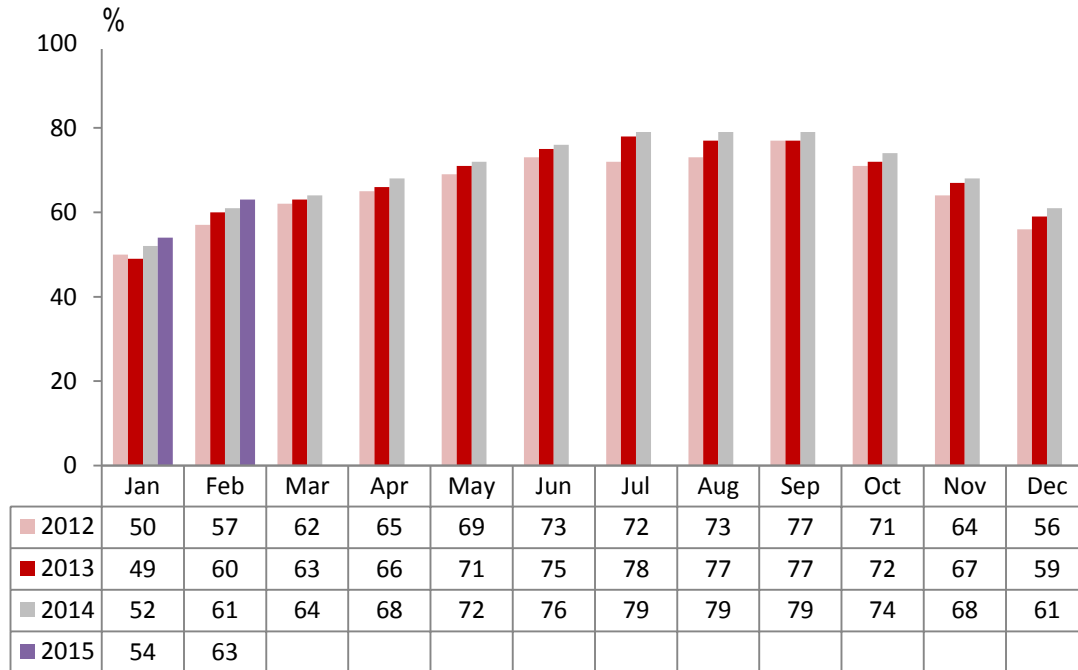
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
February								
Hotel	62%	65%	66%	67%	45%	48%	47%	49%
Guesthouse	38%	42%	39%	42%	27%	31%	29%	31%
B&B	35%	35%	35%	39%	24%	24%	25%	28%
Feb(Year to Date)								
Hotel	58%	59%	60%	62%	42%	42%	43%	45%
Guesthouse	33%	38%	35%	38%	23%	27%	25%	28%
B&B	31%	31%	31%	35%	21%	21%	22%	25%
Past 12 months								
Hotel	69%	70%	72%	73%	52%	52%	54%	54%
Guesthouse	53%	54%	54%	56%	42%	44%	42%	43%
B&B	48%	49%	49%	51%	37%	38%	38%	41%

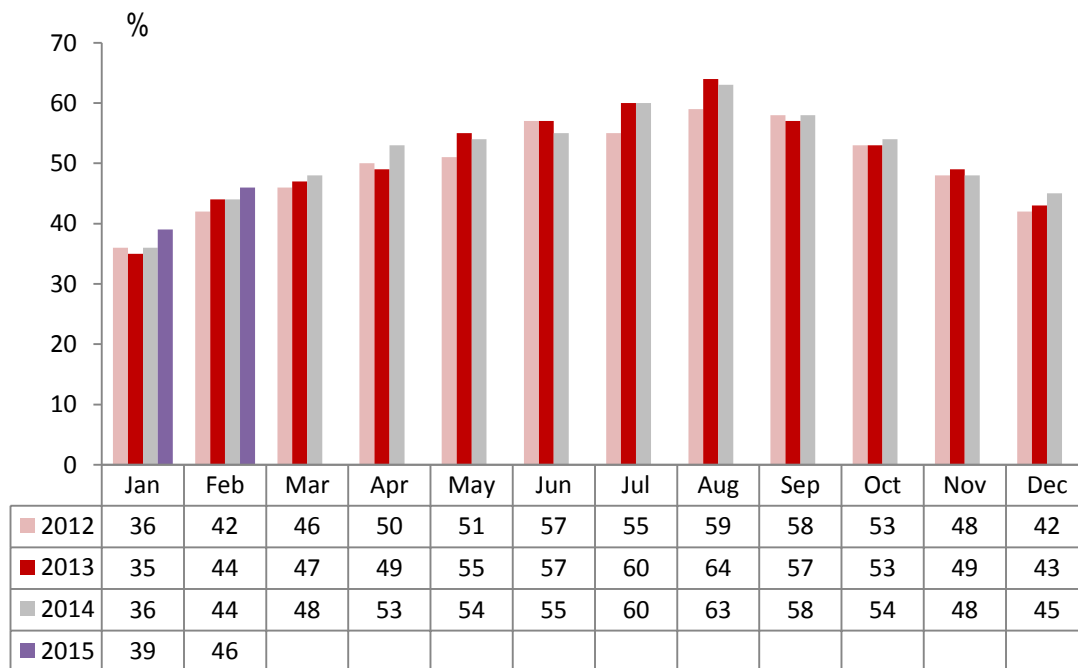
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
February								
1-3 rooms	27%	25%	27%	30%	19%	18%	20%	22%
4-10 rooms	34%	33%	33%	39%	24%	23%	23%	28%
11-25 rooms	43%	46%	47%	50%	30%	32%	33%	36%
26-50 rooms	52%	60%	61%	59%	39%	46%	44%	45%
51-100 rooms	64%	65%	57%	60%	45%	51%	43%	46%
100+ rooms	68%	71%	73%	75%	48%	50%	52%	52%
Feb(Year to Date)								
1-3 rooms	23%	22%	24%	27%	16%	16%	18%	19%
4-10 rooms	30%	30%	30%	35%	20%	20%	20%	25%
11-25 rooms	39%	41%	44%	46%	26%	28%	30%	32%
26-50 rooms	49%	54%	55%	54%	36%	40%	39%	41%
51-100 rooms	59%	58%	54%	55%	43%	43%	38%	41%
100+ rooms	64%	65%	67%	69%	45%	45%	47%	48%
Past 12 months								
1-3 rooms	41%	40%	42%	43%	33%	33%	34%	35%
4-10 rooms	49%	48%	50%	52%	38%	38%	39%	41%
11-25 rooms	57%	57%	59%	61%	44%	43%	44%	46%
26-50 rooms	62%	66%	69%	68%	48%	51%	54%	53%
51-100 rooms	69%	70%	68%	67%	53%	55%	53%	53%
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
February								
East Midlands	57%	60%	58%	58%	36%	43%	40%	41%
Yorkshire	52%	57%	59%	61%	38%	42%	43%	44%
London	74%	75%	75%	75%	53%	59%	58%	58%
North West	49%	54%	53%	57%	35%	38%	37%	40%
East of England	52%	54%	60%	60%	39%	40%	43%	43%
West Midlands	57%	62%	65%	66%	39%	43%	45%	47%
South West	49%	50%	50%	55%	37%	36%	36%	41%
South East	54%	56%	60%	64%	39%	40%	39%	47%
North East	50%	51%	49%	55%	34%	35%	35%	37%
Feb(Year to Date)								
East Midlands	54%	54%	52%	54%	33%	36%	35%	37%
Yorkshire	47%	51%	53%	55%	34%	36%	38%	39%
London	71%	69%	70%	71%	53%	54%	54%	54%
North West	45%	50%	48%	51%	32%	34%	34%	36%
East of England	49%	48%	56%	56%	36%	35%	39%	39%
West Midlands	51%	55%	58%	60%	35%	37%	39%	42%
South West	45%	44%	47%	51%	32%	31%	34%	37%
South East	50%	52%	55%	59%	36%	35%	36%	41%
North East	43%	33%	43%	53%	29%	29%	30%	35%
Past 12 months								
East Midlands	62%	64%	64%	65%	41%	43%	44%	46%
Yorkshire	60%	61%	64%	67%	44%	46%	48%	49%
London	82%	80%	82%	82%	64%	62%	64%	63%
North West	56%	59%	60%	62%	41%	43%	44%	45%
East of England	61%	61%	64%	67%	48%	47%	48%	50%
West Midlands	62%	64%	65%	69%	44%	45%	46%	49%
South West	61%	60%	62%	65%	47%	46%	48%	50%
South East	63%	66%	69%	71%	48%	48%	51%	50%
North East	65%	57%	58%	60%	47%	41%	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.