

## England Occupancy Survey - March 2015

### SUMMARY OF RESULTS

- Room and bedspace occupancy in March remained flat (down -1% to 63% for room, and 0% to 48% for bedspace occupancy).
- Both weekday and weekend occupancy saw a +1% change for room occupancy, at 69% and 59% respectively, with bedspace occupancy showing a decline of -4% for weekday and a rise of +4% for weekend.
- Seaside occupancy in March was down -7% to 42%, with bedspace occupancy up +7% to 44%. City/large town locations remained flat for room occupancy (+1% to 74%) and declined by -4% for bedspace. Both countryside and small towns saw increases for both room and bedspace, with countryside up +5% for room occupancy compared to the same month last year.
- Looking at occupancy by establishment type, B&B's and guest houses saw occupancy remain broadly flat, whilst B&B's saw an increase of +5% for room and +4% for bed.
- 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 51-100 room category saw the biggest uplift for room occupancy compared to March last year (+7%).
- Looking at occupancy by region, the West Midlands (+14%) and the South East (+6%) saw the biggest increases in room occupancy, with London, the South West and the East of England (-3%, -4% and -4%) seeing the biggest declines. Looking at bedspace occupancy, the South East and South West saw the biggest increases (+5% and +4%), with London, again, seeing the biggest decline (-5%).

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

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
<b>March</b>	<b>64%</b>	<b>63%</b>	<b>-1%</b>	<b>48%</b>	<b>48%</b>	<b>0%</b>
Mar (Year to Date)	59%	60%	+1%	43%	44%	+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	% +/-
<b>March</b>	<b>55%</b>	<b>53%</b>	<b>-2%</b>	<b>41%</b>	<b>43%</b>	<b>+2%</b>
Mar (Year to Date)	50%	51%	+1%	35%	37%	+2%
Past 12 months	62%	63%	+1%	47%	48%	+1%

## Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>March</b>								
Weekday	66%	65%	68%	69%	43%	44%	50%	46%
Weekend	58%	60%	58%	59%	48%	50%	44%	48%
<b>Mar (Year to Date)</b>								
Weekday	60%	60%	63%	65%	39%	40%	43%	43%
Weekend	52%	53%	53%	54%	42%	44%	42%	45%
<b>Past 12 months</b>								
Weekday	68%	68%	70%	72%	47%	47%	49%	49%
Weekend	64%	63%	65%	67%	53%	53%	53%	54%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>March</b>								
Seaside	48%	50%	49%	42%	36%	39%	37%	44%
City/large town	71%	71%	73%	74%	53%	54%	57%	53%
Small town	60%	60%	59%	62%	41%	43%	41%	42%
Countryside	49%	52%	48%	53%	35%	40%	36%	39%
<b>Mar (Year to Date)</b>								
Seaside	42%	43%	44%	45%	31%	31%	30%	38%
City/large town	65%	65%	68%	70%	48%	49%	50%	51%
Small town	54%	54%	55%	57%	36%	37%	38%	39%
Countryside	44%	46%	45%	48%	32%	34%	33%	34%
<b>Past 12 months</b>								
Seaside	56%	58%	59%	61%	47%	45%	44%	49%
City/large town	72%	73%	77%	78%	55%	55%	57%	57%
Small town	61%	63%	64%	65%	43%	44%	45%	46%
Countryside	57%	56%	59%	59%	44%	45%	46%	46%

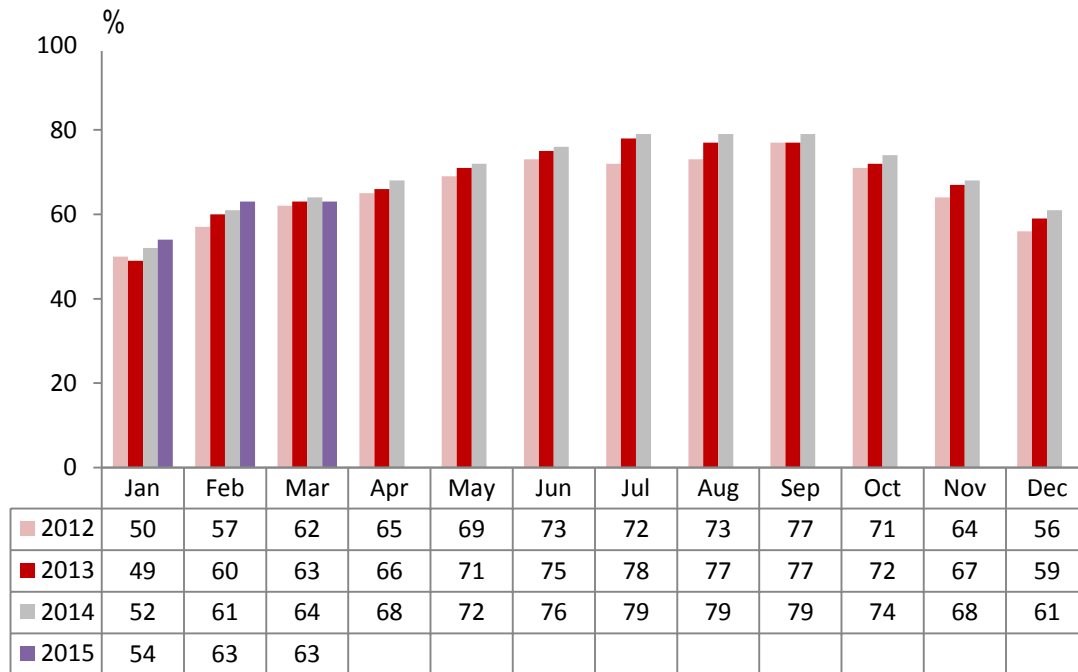
## Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>March</b>								
Hotel	67%	68%	68%	67%	49%	51%	51%	51%
Guesthouse	42%	45%	45%	44%	31%	34%	33%	32%
B&B	41%	41%	38%	43%	29%	30%	28%	32%
<b>Mar(Year to Date)</b>								
Hotel	61%	62%	63%	64%	44%	45%	46%	47%
Guesthouse	36%	40%	39%	41%	26%	30%	28%	29%
B&B	34%	35%	34%	38%	24%	24%	24%	28%
<b>Past 12 months</b>								
Hotel	69%	70%	71%	73%	52%	52%	53%	54%
Guesthouse	53%	55%	54%	56%	42%	44%	42%	43%
B&B	48%	49%	49%	52%	37%	38%	38%	41%

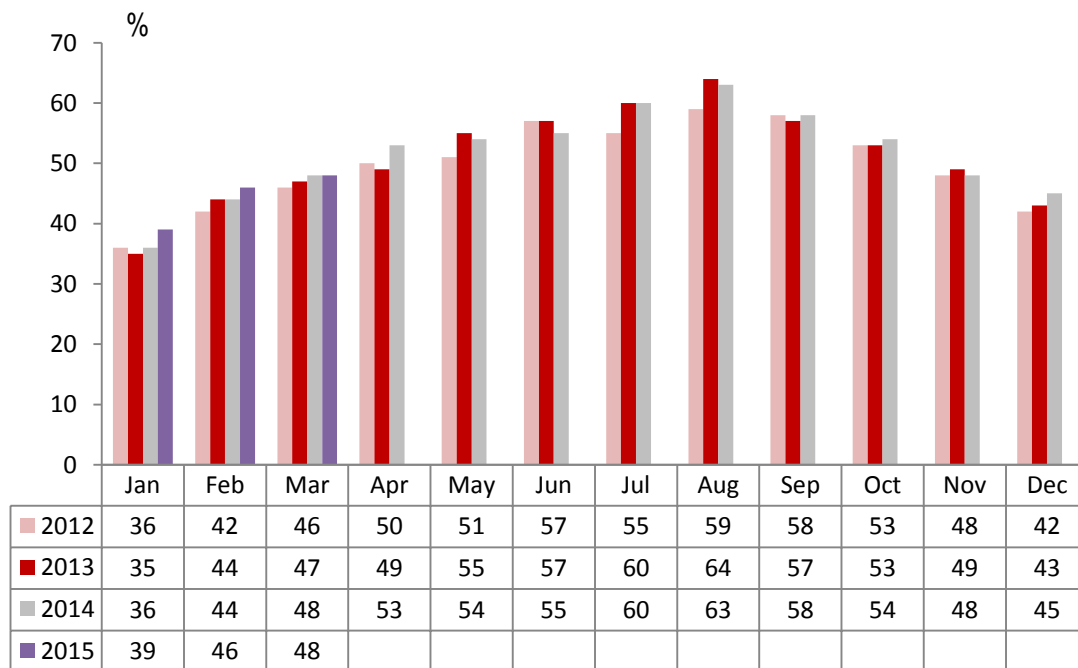
## Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>March</b>								
1-3 rooms	31%	33%	29%	33%	24%	25%	21%	24%
4-10 rooms	39%	39%	38%	42%	29%	30%	27%	30%
11-25 rooms	52%	49%	53%	55%	38%	36%	38%	39%
26-50 rooms	63%	65%	64%	62%	46%	49%	48%	49%
51-100 rooms	67%	70%	60%	67%	49%	58%	56%	54%
100+ rooms	72%	73%	75%	75%	50%	51%	53%	52%
<b>Mar(Year to Date)</b>								
1-3 rooms	26%	26%	26%	29%	19%	19%	19%	21%
4-10 rooms	33%	33%	33%	37%	29%	24%	23%	27%
11-25 rooms	44%	44%	48%	49%	38%	31%	33%	35%
26-50 rooms	53%	58%	58%	57%	46%	43%	42%	43%
51-100 rooms	62%	62%	56%	60%	49%	48%	43%	46%
100+ rooms	67%	68%	70%	71%	50%	47%	49%	50%
<b>Past 12 months</b>								
1-3 rooms	41%	40%	41%	44%	33%	33%	33%	35%
4-10 rooms	49%	48%	50%	52%	39%	38%	39%	41%
11-25 rooms	57%	56%	59%	62%	44%	43%	45%	46%
26-50 rooms	63%	66%	69%	68%	49%	51%	54%	53%
51-100 rooms	69%	70%	66%	68%	53%	56%	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
<b>March</b>								
East Midlands	57%	61%	57%	57%	37%	45%	43%	41%
Yorkshire	55%	60%	61%	60%	40%	44%	45%	42%
London	78%	80%	80%	77%	60%	62%	62%	57%
North West	56%	57%	57%	59%	39%	41%	40%	41%
East of England	58%	55%	67%	63%	43%	41%	44%	44%
West Midlands	63%	63%	55%	69%	44%	45%	48%	48%
South West	55%	55%	63%	59%	42%	41%	40%	44%
South East	60%	61%	51%	57%	43%	44%	46%	51%
North East	52%	53%	51%	54%	36%	36%	36%	36%
<b>Mar(Year to Date)</b>								
East Midlands	55%	57%	54%	55%	34%	39%	38%	39%
Yorkshire	50%	54%	56%	57%	36%	39%	40%	40%
London	74%	73%	73%	73%	55%	57%	56%	55%
North West	48%	52%	51%	54%	34%	36%	36%	38%
East of England	52%	51%	57%	58%	38%	37%	41%	41%
West Midlands	55%	57%	61%	64%	38%	40%	42%	44%
South West	48%	48%	49%	54%	36%	35%	36%	39%
South East	53%	55%	58%	58%	38%	38%	39%	45%
North East	45%	46%	46%	54%	31%	31%	37%	36%
<b>Past 12 months</b>								
East Midlands	62%	64%	65%	65%	41%	44%	44%	45%
Yorkshire	60%	61%	64%	67%	45%	46%	48%	49%
London	82%	80%	82%	82%	63%	62%	64%	63%
North West	57%	59%	60%	62%	41%	43%	44%	45%
East of England	61%	61%	65%	67%	48%	47%	48%	50%
West Midlands	62%	64%	66%	69%	44%	45%	47%	49%
South West	61%	60%	62%	65%	48%	46%	48%	50%
South East	63%	66%	68%	70%	48%	49%	48%	51%
North East	65%	57%	58%	61%	47%	41%	45%	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.