

## England Occupancy Survey - May 2015

### SUMMARY OF RESULTS

- Room occupancy in May remained flat (remaining at 72%), with bedspace occupancy up +1% to 55%.
- Weekday and weekend occupancy remained flat for room occupancy (at 72% and 71%), with bedspace occupancy up +1% for weekday and down -1% for weekend.
- There was little movement in May by destination type compared with last year, with cities/large towns having the highest occupancy rates this month.
- Looking at occupancy by establishment type, B&B's saw occupancy increase by +3% for room and +5% for bed. Hotels remained flat for both room and bedspace occupancy and guesthouses declined by -2% for room and increased by +1% for bed.
- Looking at number of rooms, and by room occupancy, the 1-3 room category was up +4% in May, with the 4-10 category up +1%. The rest either remained flat or declined, with declines in the 51-100 (-4%) and 26-30 (-3%) room categories. Bedspace occupancy saw increases across most categories, apart from the 51-100 room category which decreased by -3% and the 100+ category which remained flat.
- Looking at occupancy by region, the East Midlands saw the biggest decline for room occupancy in May (down -4% to 64%), with the East of England showing the biggest uplift (+3% to 70%). For bedspace occupancy, the biggest decline for the month was in London (down -2% to 64%), with the biggest uplift in the North West and the South East (+2% respectively, to 47% and 55%).

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

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
<b>May</b>	72%	72%	0%	54%	55%	+1%
Jan-May	64%	64%	0%	47%	47%	0%
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>May</b>	66%	66%	0%	51%	51%	0%
Jan-May	56%	56%	0%	41%	41%	0%
Past 12 months	62%	63%	+1%	48%	47%	-1%

## Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>May</b>								
Weekday	70%	70%	72%	72%	47%	49%	50%	51%
Weekend	67%	71%	71%	71%	56%	60%	59%	58%
<b>Jan-May</b>								
Weekday	63%	64%	66%	67%	42%	43%	46%	45%
Weekend	57%	58%	60%	60%	47%	48%	48%	50%
<b>Past 12 months</b>								
Weekday	68%	68%	71%	72%	47%	47%	49%	49%
Weekend	64%	63%	65%	66%	53%	53%	53%	54%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>May</b>								
Seaside	58%	62%	65%	64%	44%	54%	48%	48%
City/large town	77%	78%	81%	79%	57%	59%	60%	60%
Small town	66%	67%	68%	69%	46%	48%	49%	50%
Countryside	60%	65%	64%	65%	46%	52%	51%	52%
<b>Jan-May</b>								
Seaside	48%	50%	52%	53%	35%	39%	37%	40%
City/large town	69%	69%	73%	73%	50%	52%	54%	54%
Small town	57%	58%	59%	61%	38%	40%	42%	43%
Countryside	49%	52%	52%	53%	37%	40%	39%	40%
<b>Past 12 months</b>								
Seaside	56%	58%	60%	61%	46%	46%	45%	48%
City/large town	73%	73%	77%	78%	55%	55%	57%	57%
Small town	61%	63%	65%	65%	43%	44%	46%	46%
Countryside	56%	57%	59%	59%	44%	45%	46%	46%

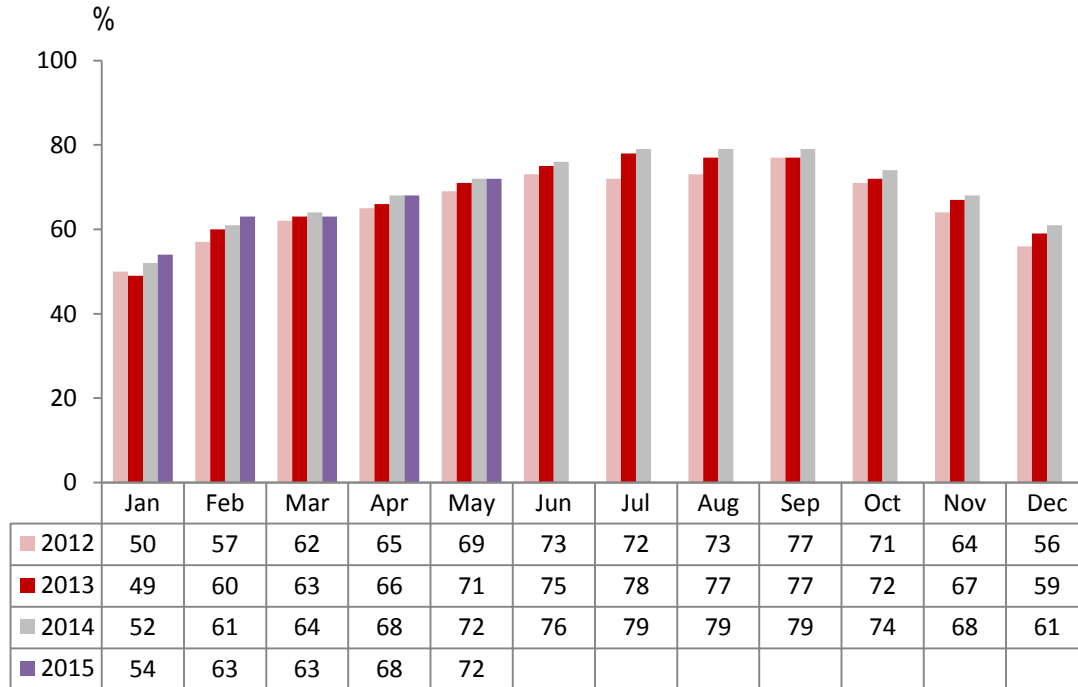
## Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>May</b>								
Hotel	73%	74%	75%	75%	53%	57%	56%	56%
Guesthouse	57%	60%	60%	58%	46%	49%	47%	48%
B&B	53%	54%	55%	58%	41%	43%	44%	49%
<b>Jan-May</b>								
Hotel	65%	66%	67%	68%	48%	49%	50%	50%
Guesthouse	44%	45%	47%	47%	33%	35%	35%	36%
B&B	41%	41%	41%	45%	31%	30%	32%	35%
<b>Past 12 months</b>								
Hotel	69%	70%	72%	73%	52%	52%	53%	53%
Guesthouse	53%	54%	55%	55%	42%	44%	42%	43%
B&B	48%	49%	49%	52%	37%	38%	38%	42%

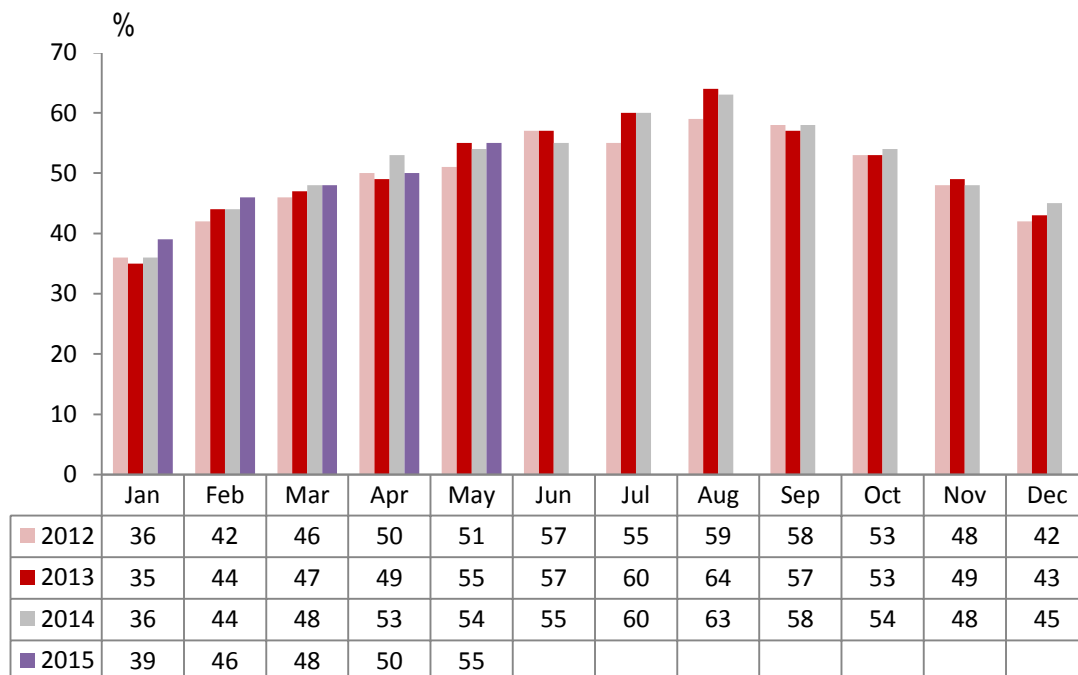
## Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>May</b>								
1-3 rooms	45%	49%	47%	51%	37%	41%	39%	41%
4-10 rooms	50%	56%	56%	57%	39%	45%	45%	46%
11-25 rooms	56%	60%	64%	64%	42%	45%	49%	52%
26-30 rooms	71%	74%	73%	70%	52%	58%	58%	59%
51-100 rooms	75%	72%	71%	67%	57%	56%	53%	50%
100+ rooms	77%	79%	80%	80%	54%	57%	58%	58%
<b>Jan-May</b>								
1-3 rooms	33%	34%	34%	37%	25%	26%	27%	28%
4-10 rooms	39%	40%	41%	44%	29%	30%	31%	33%
11-25 rooms	49%	49%	54%	54%	35%	35%	39%	40%
26-30 rooms	58%	63%	63%	61%	44%	48%	48%	48%
51-100 rooms	66%	65%	60%	62%	50%	51%	47%	46%
100+ rooms	70%	71%	74%	74%	49%	51%	53%	52%
<b>Past 12 months</b>								
1-3 rooms	40%	41%	41%	44%	32%	33%	33%	35%
4-10 rooms	48%	48%	50%	53%	38%	38%	39%	42%
11-25 rooms	57%	56%	61%	61%	43%	43%	46%	46%
26-30 rooms	63%	67%	69%	68%	49%	52%	54%	53%
51-100 rooms	70%	70%	66%	67%	54%	55%	53%	51%
100+ rooms	74%	74%	77%	78%	n/a	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>May</b>								
East Midlands	65%	66%	68%	64%	43%	46%	47%	48%
Yorkshire	63%	67%	70%	70%	45%	52%	53%	54%
London	83%	85%	84%	83%	65%	67%	66%	64%
North West	57%	58%	62%	62%	40%	42%	45%	47%
East of England	66%	65%	67%	70%	50%	50%	52%	52%
West Midlands	67%	67%	70%	71%	47%	49%	51%	52%
South West	62%	66%	67%	68%	48%	53%	53%	53%
South East	71%	74%	75%	75%	52%	59%	53%	55%
North East	63%	66%	67%	66%	46%	49%	51%	50%
<b>Jan-May</b>								
East Midlands	58%	59%	59%	58%	38%	41%	41%	42%
Yorkshire	54%	58%	61%	61%	39%	43%	45%	45%
London	77%	77%	77%	76%	59%	60%	60%	58%
North West	53%	54%	55%	57%	36%	38%	40%	41%
East of England	55%	55%	60%	62%	42%	42%	45%	44%
West Midlands	59%	61%	64%	66%	41%	43%	46%	47%
South West	53%	54%	55%	59%	40%	40%	42%	44%
South East	59%	61%	64%	64%	43%	45%	44%	46%
North East	51%	53%	53%	57%	36%	37%	39%	40%
<b>Past 12 months</b>								
East Midlands	62%	64%	64%	64%	42%	44%	45%	45%
Yorkshire	60%	62%	65%	67%	45%	47%	49%	49%
London	82%	80%	82%	82%	63%	63%	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%	47%	48%	50%
South East	63%	66%	68%	70%	48%	49%	48%	50%
North East	64%	57%	58%	61%	46%	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.