

England Occupancy Survey - August 2013

SUMMARY OF RESULTS

- Room occupancy (including STR Global data) increased by 4% in August 2013 compared with the same period in 2012 (rising from 73% to 77%). Bedspace Occupancy also increased, rising to 64% (up 5%).
- Weekday room occupancy in August increased by 5% against last year's August figure, with weekend occupancy up by 4%. For bedspace, weekday occupancy increased by 4%, with weekend occupancy up by 3%.
- Room occupancy in countryside locations saw the greatest increase in August when compared with last year (up 7%). For bedspace occupancy it was seaside locations which saw the biggest increase (up 16%).
- There were increases in occupancy rates across all establishment types, with room occupancy in hotels and guest houses up 4% and B&B's up 5%. For bedspace occupancy hotels were up 6%, B&B's up 4% and guest houses up 2%.
- When looking at occupancy figures for August by number of rooms, there were increases in all categories. The greatest increases were found in the mid-range level of 11-25 and 26-30 rooms, up 7% for room occupancy and 6-7% for bedspace.
- The South West saw the greatest increases in room occupancy during August when compared with August last year, up 9%. For bedspace occupancy the South West has, again, performed strongly (up 7%), along with the South East (up 10%).

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
August	73%	77%	+4%	59%	64%	+5%
Jan-Aug	65%	67%	+2%	49%	51%	+2%
Past 12 months	65%	68%	+3%	49%	51%	+2%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
August	71%	75%	+4%	60%	67%	+7%
Jan-Aug	60%	61%	+1%	47%	48%	+1%
Past 12 months	60%	63%	+3%	47%	49%	+2%

Please note that STR 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.

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
August								
Weekday	71%	72%	71%	76%	54%	55%	54%	58%
Weekend	73%	74%	74%	78%	63%	64%	64%	67%
Jan-Aug								
Weekday	62%	68%	67%	69%	43%	47%	46%	48%
Weekend	60%	63%	62%	65%	50%	52%	52%	54%
Past 12 months								
Weekday	62%	68%	67%	69%	42%	46%	46%	48%
Weekend	60%	63%	63%	65%	50%	52%	52%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
August								
Seaside	76%	74%	73%	79%	66%	68%	60%	76%
City/large town	75%	72%	75%	81%	58%	58%	58%	64%
Small town	67%	68%	71%	73%	53%	53%	52%	56%
Countryside	66%	69%	69%	76%	56%	58%	60%	65%
Jan-Aug								
Seaside	54%	57%	57%	59%	44%	48%	45%	46%
City/large town	70%	73%	72%	76%	50%	55%	54%	57%
Small town	54%	61%	62%	65%	48%	42%	44%	46%
Countryside	53%	57%	55%	56%	43%	44%	44%	44%
Past 12 months								
Seaside	54%	56%	56%	60%	43%	46%	45%	50%
City/large town	70%	73%	72%	75%	49%	55%	54%	57%
Small town	55%	60%	62%	64%	46%	42%	43%	45%
Countryside	52%	56%	56%	59%	41%	43%	44%	46%

Please note that STR 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.

Establishment Type

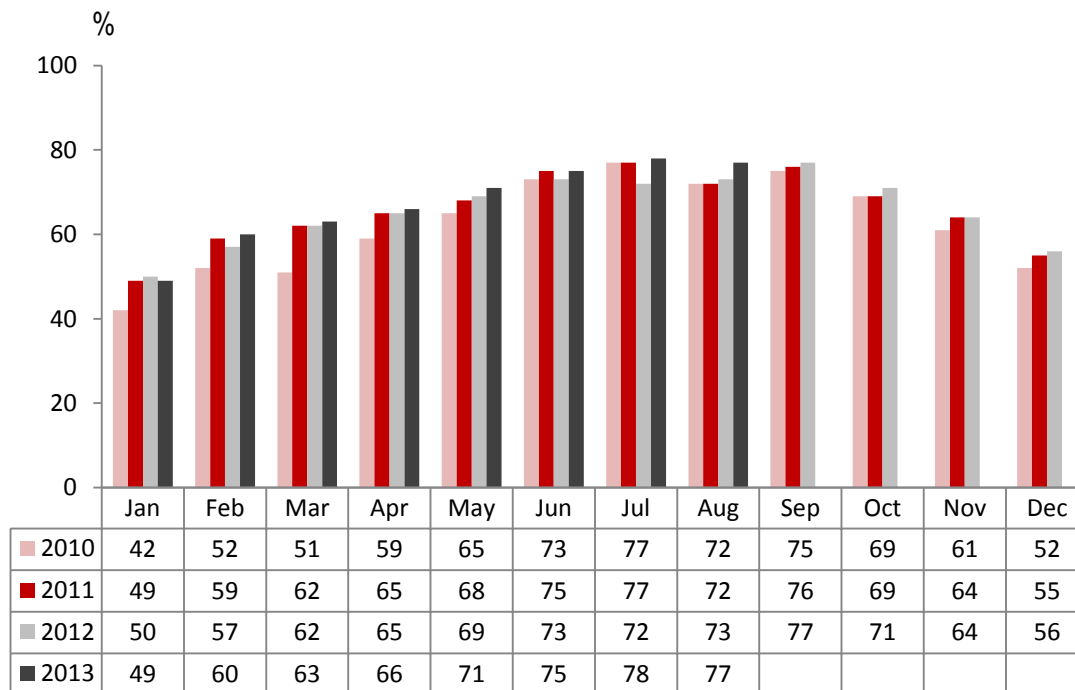
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
August								
Hotel	73%	73%	75%	79%	58%	59%	59%	65%
Guesthouse	71%	71%	69%	73%	61%	62%	61%	63%
B&B	63%	67%	63%	68%	54%	55%	54%	58%
Jan-Aug								
Hotel	65%	69%	68%	71%	50%	51%	51%	53%
Guesthouse	53%	55%	54%	55%	42%	44%	43%	44%
B&B	49%	50%	49%	50%	39%	39%	39%	39%
Past 12 months								
Hotel	65%	69%	69%	71%	49%	51%	51%	54%
Guesthouse	52%	53%	53%	54%	41%	42%	43%	43%
B&B	49%	50%	49%	49%	38%	37%	37%	38%

Number of rooms

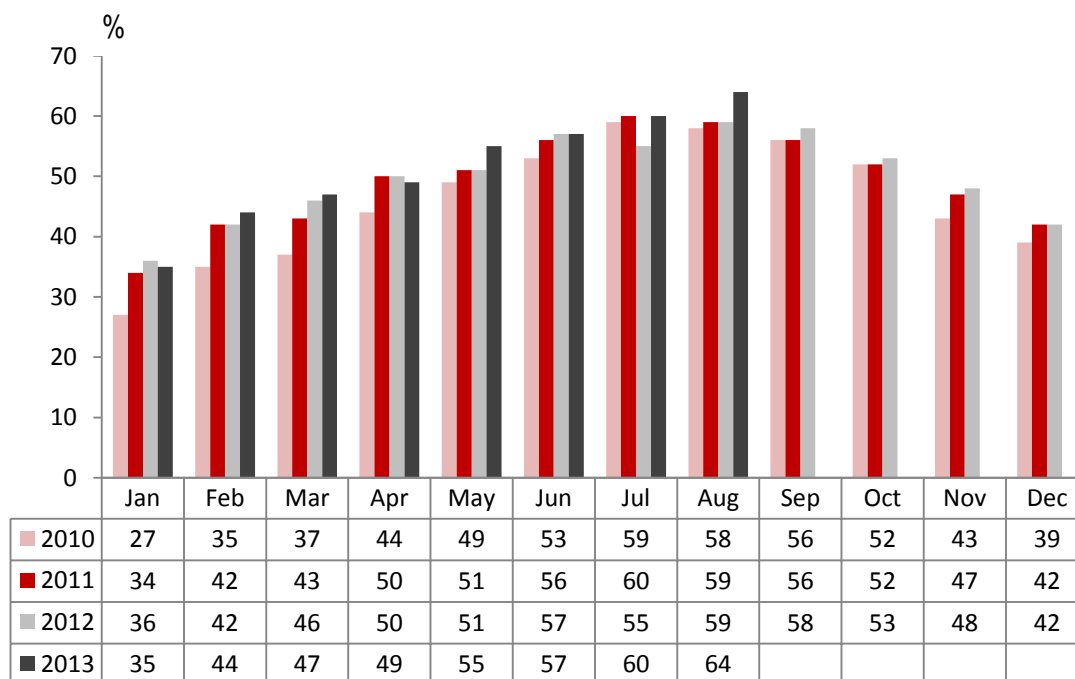
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
August								
1-3 rooms	57%	59%	56%	61%	49%	51%	49%	53%
4-10 rooms	70%	69%	66%	71%	61%	60%	58%	61%
11-25 rooms	68%	67%	66%	73%	58%	56%	56%	62%
26-30 rooms	77%	69%	73%	80%	65%	57%	62%	69%
51-100 rooms	74%	75%	77%	78%	59%	64%	65%	67%
100+ rooms	76%	76%	77%	80%	55%	57%	58%	61%
Jan-Aug								
1-3 rooms	42%	43%	41%	43%	34%	35%	34%	35%
4-10 rooms	51%	50%	49%	51%	41%	39%	39%	41%
11-25 rooms	55%	57%	55%	58%	44%	45%	43%	44%
26-30 rooms	64%	63%	64%	69%	50%	48%	50%	54%
51-100 rooms	69%	69%	70%	68%	54%	53%	54%	54%
100+ rooms	68%	74%	73%	76%	n/a	53%	52%	54%
Past 12 months								
1-3 rooms	41%	41%	40%	41%	32%	32%	32%	33%
4-10 rooms	50%	49%	49%	49%	40%	38%	38%	39%
11-25 rooms	55%	57%	56%	58%	43%	44%	43%	44%
26-30 rooms	64%	63%	63%	69%	50%	48%	49%	54%
51-100 rooms	69%	69%	69%	70%	53%	53%	54%	56%
100+ rooms	68%	74%	74%	76%	n/a	53%	52%	54%

Please note that STR 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.

England Room Occupancy by Month



England Bedspace Occupancy by Month



Please note that STR 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.

Regional Information

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
August								
East Midlands	66%	66%	72%	73%	52%	51%	51%	54%
Yorkshire	66%	69%	69%	74%	48%	55%	56%	61%
London	82%	80%	80%	85%	67%	65%	67%	71%
North West	66%	62%	64%	69%	59%	49%	51%	54%
East of England	68%	66%	71%	72%	57%	58%	57%	60%
West Midlands	62%	64%	66%	68%	49%	49%	50%	52%
South West	76%	77%	72%	81%	64%	65%	62%	69%
South East	74%	74%	75%	79%	57%	61%	58%	68%
North East	61%	71%	64%	69%	48%	54%	49%	51%
Jan-Aug								
East Midlands	56%	62%	62%	65%	38%	41%	42%	46%
Yorkshire	55%	60%	60%	64%	41%	44%	45%	48%
London	78%	82%	79%	81%	60%	64%	61%	64%
North West	57%	55%	56%	60%	42%	40%	41%	43%
East of England	57%	61%	61%	62%	47%	48%	47%	47%
West Midlands	59%	63%	62%	64%	47%	45%	44%	46%
South West	59%	62%	60%	63%	47%	49%	48%	49%
South East	57%	64%	65%	67%	49%	49%	49%	48%
North East	53%	65%	58%	59%	39%	46%	42%	43%
Past 12 months								
East Midlands	56%	61%	62%	65%	38%	41%	42%	45%
Yorkshire	56%	60%	60%	63%	42%	44%	45%	47%
London	79%	83%	80%	82%	59%	65%	62%	64%
North West	58%	56%	57%	61%	42%	41%	42%	44%
East of England	57%	61%	61%	62%	46%	46%	47%	47%
West Midlands	57%	63%	63%	65%	45%	45%	44%	46%
South West	58%	61%	60%	61%	46%	47%	47%	48%
South East	55%	63%	64%	68%	45%	47%	48%	51%
North East	56%	63%	62%	57%	39%	44%	44%	41%

Please note that STR 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.

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.

Please note that STR 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.