

## England Occupancy Survey - July 2013

### SUMMARY OF RESULTS

- Room occupancy (including STR Global data) increased by 6% in July 2013 compared with the same period in 2012 (rising from 72% to 78%). Bedspace Occupancy (including STR Global data) also increased, rising to 60% (up 5%).
- Weekday room occupancy in July increased by 5% against last year's July figure, with weekend occupancy up by 7%. For bedspace, weekday occupancy increased by 4%, with weekend occupancy up by 6%.
- Room occupancy in countryside locations saw the greatest increase in July when compared with last year (up 12%). For bedspace occupancy it was seaside locations which saw the biggest increase (up 13%).
- There were increases in occupancy rates across all establishment types, with hotels seeing the greatest increases in both room and bedspace occupancy.
- When looking at occupancy figures for July by number of rooms, there were increases in all categories apart from the 1-3 rooms category, which remained flat for both levels of occupancy. The greatest increase was found in the 51-100+ room category (up 9% for room and 11% for bedspace), with the 11-25 and 26-30 room categories also performing strongly.
- London and the South West saw the greatest increases in room occupancy during July, up 8% and 7% against July last year. For bedspace occupancy, London again saw the greatest increase in July (up 7%), as did the South East (up 7%). The North East was the only area to witness a decline (-5% for room and -3% for bedspace).

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

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
July	72%	78%	+6%	55%	60%	+5%
Jan-Jul	64%	67%	+3%	48%	50%	+2%
Past 12 months	65%	67%	+2%	49%	51%	+2%

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

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
July	68%	75%	+7%	55%	64%	+9%
Jan-Jul	59%	61%	+2%	45%	48%	+3%
Past 12 months	60%	62%	+2%	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
<b>July</b>								
Weekday	78%	80%	74%	79%	56%	56%	52%	56%
Weekend	76%	75%	68%	75%	63%	63%	57%	63%
<b>Jan-Jul</b>								
Weekday	61%	68%	66%	68%	41%	46%	45%	47%
Weekend	59%	62%	61%	63%	48%	51%	50%	52%
<b>Past 12 months</b>								
Weekday	62%	68%	67%	69%	42%	46%	46%	48%
Weekend	60%	63%	63%	64%	50%	52%	52%	53%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>July</b>								
Seaside	70%	70%	69%	77%	57%	62%	57%	70%
City/large town	84%	82%	76%	83%	63%	63%	58%	61%
Small town	71%	74%	73%	76%	54%	54%	52%	54%
Countryside	66%	69%	60%	72%	55%	56%	50%	58%
<b>Jan-Jul</b>								
Seaside	51%	54%	54%	58%	40%	44%	42%	48%
City/large town	70%	73%	71%	75%	49%	54%	53%	56%
Small town	53%	60%	61%	63%	47%	41%	43%	44%
Countryside	51%	56%	53%	58%	40%	42%	42%	44%
<b>Past 12 months</b>								
Seaside	54%	56%	56%	59%	43%	46%	46%	48%
City/large town	69%	73%	72%	75%	50%	55%	54%	56%
Small town	55%	60%	61%	64%	46%	42%	43%	45%
Countryside	52%	55%	56%	58%	40%	43%	44%	46%

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## Establishment Type

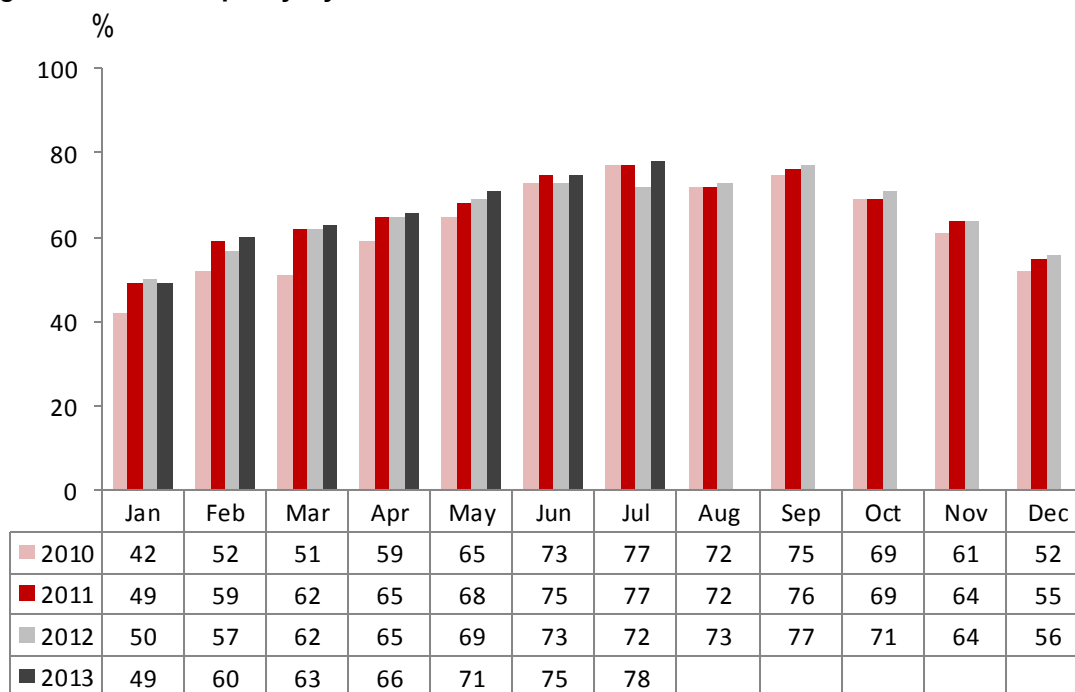
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>July</b>								
Hotel	80%	79%	74%	80%	60%	61%	55%	61%
Guesthouse	69%	70%	68%	71%	57%	60%	58%	58%
B&B	63%	65%	62%	63%	54%	53%	50%	52%
<b>Jan-Jul</b>								
Hotel	64%	68%	67%	70%	48%	50%	50%	53%
Guesthouse	50%	52%	51%	52%	39%	41%	41%	41%
B&B	46%	48%	47%	47%	37%	36%	36%	36%
<b>Past 12 months</b>								
Hotel	64%	69%	68%	71%	48%	51%	51%	53%
Guesthouse	52%	54%	53%	54%	41%	42%	42%	43%
B&B	47%	48%	48%	49%	38%	37%	37%	38%

## Number of rooms

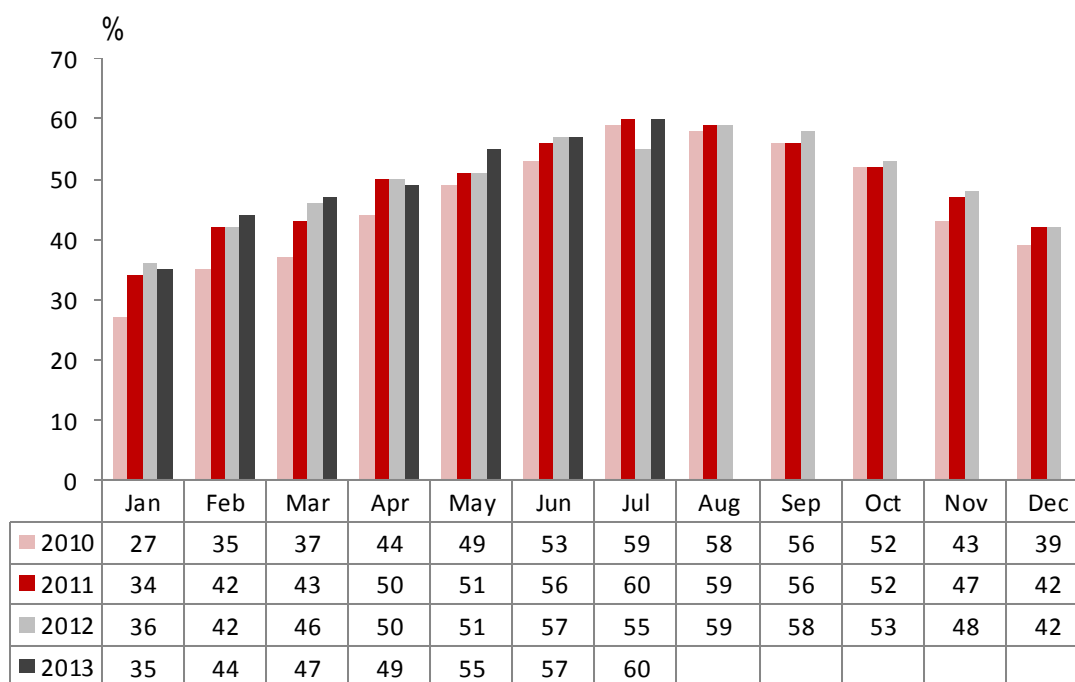
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>July</b>								
1-3 rooms	56%	59%	55%	56%	47%	50%	47%	47%
4-10 rooms	66%	66%	63%	66%	56%	55%	52%	55%
11-25 rooms	69%	71%	64%	73%	57%	57%	53%	59%
26-30 rooms	76%	76%	73%	80%	61%	60%	59%	65%
51-100 rooms	78%	78%	71%	80%	60%	61%	55%	66%
100+ rooms	84%	84%	78%	83%	n/a	60%	55%	58%
<b>Jan-Jul</b>								
1-3 rooms	40%	41%	39%	40%	31%	32%	31%	32%
4-10 rooms	48%	47%	46%	48%	38%	36%	36%	37%
11-25 rooms	53%	56%	54%	55%	41%	43%	41%	41%
26-30 rooms	62%	62%	63%	67%	48%	46%	48%	52%
51-100 rooms	68%	68%	68%	69%	53%	51%	52%	54%
100+ rooms	68%	74%	72%	75%	n/a	n/a	51%	53%
<b>Past 12 months</b>								
1-3 rooms	41%	41%	40%	41%	32%	33%	32%	33%
4-10 rooms	50%	49%	49%	49%	40%	39%	38%	39%
11-25 rooms	55%	57%	56%	57%	43%	44%	43%	43%
26-30 rooms	63%	64%	63%	68%	49%	48%	49%	53%
51-100 rooms	69%	69%	69%	70%	54%	52%	53%	55%
100+ rooms	67%	74%	74%	75%	n/a	n/a	n/a	53%

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



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## Regional Information

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>July</b>								
East Midlands	67%	71%	70%	74%	50%	49%	47%	51%
Yorkshire	67%	71%	68%	73%	46%	54%	52%	56%
London	92%	92%	80%	88%	73%	73%	62%	69%
North West	65%	65%	64%	69%	51%	49%	48%	50%
East of England	70%	75%	70%	73%	56%	59%	53%	56%
West Midlands	68%	67%	67%	69%	53%	49%	48%	49%
South West	76%	76%	70%	77%	62%	62%	57%	61%
South East	78%	79%	77%	82%	57%	63%	60%	67%
North East	68%	74%	71%	66%	53%	55%	52%	49%
<b>Jan-Jul</b>								
East Midlands	56%	62%	61%	64%	38%	40%	41%	44%
Yorkshire	55%	59%	58%	62%	40%	42%	43%	46%
London	80%	82%	78%	80%	61%	64%	60%	63%
North West	57%	54%	55%	58%	41%	38%	40%	41%
East of England	57%	60%	59%	60%	45%	46%	45%	45%
West Midlands	59%	62%	61%	64%	46%	44%	43%	45%
South West	58%	60%	58%	60%	45%	46%	45%	46%
South East	58%	63%	64%	67%	50%	47%	48%	50%
North East	56%	64%	57%	58%	40%	45%	41%	41%
<b>Past 12 months</b>								
East Midlands	55%	61%	62%	65%	38%	41%	42%	45%
Yorkshire	56%	59%	60%	63%	44%	43%	45%	47%
London	78%	83%	80%	81%	58%	65%	62%	64%
North West	58%	57%	57%	60%	42%	42%	42%	43%
East of England	57%	61%	61%	62%	46%	46%	47%	47%
West Midlands	57%	62%	62%	65%	45%	45%	44%	46%
South West	58%	61%	60%	60%	46%	47%	47%	47%
South East	55%	63%	64%	67%	45%	46%	48%	50%
North East	58%	62%	62%	57%	40%	44%	45%	41%

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## 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.