

## England Occupancy Survey - June 2013

### SUMMARY OF RESULTS

- Room occupancy (including STR Global data) increased by 2% in June 2013 compared with the same period in 2012 (rising from 73% to 75%). Bedspace Occupancy (including STR Global data) remained flat, at 57%.
- Weekday room occupancy in June increased by 5% against last year's June figure, whilst weekend occupancy increased marginally, by 1%. For bedspace, weekday occupancy remained flat, with weekend occupancy falling by 2%.
- Room occupancy in city/large town locations saw the greatest increase in June when compared with last year (up +6%). For bedspace occupancy it was seaside locations which saw the biggest increase (up 3%).
- There was a decline in occupancy for guesthouses in June for both room and bed occupancy (by -1% and -4% respectively). Hotels saw the greatest room occupancy increase (up 3%), and is the only establishment type to have increased for the year-to-date.
- When looking at occupancy figures for June by number of rooms, there were increases in all categories apart from the 51-100 category, which fell by -2%, with the greatest increase in the 100+ room category (up 4%). There were no increases in bedspace occupancy by number of rooms for June, with occupancy levels remaining flat or down.
- London and the North West saw the greatest increases in room occupancy during June, up 7% and 4% against June last year. The North East witnessed a very slight decline (-1%) with all other regions either flat or up. For bedspace occupancy, London again saw the greatest increase in June (up 3%), whereas the South West saw the greatest decrease, at -4%. Looking at the year-to-date, Yorkshire has seen the biggest increase in occupancy for both room and bedspace occupancy (up 4%).

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

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
June	73%	75%	+2%	57%	57%	0%
Jan-Jun	63%	64%	+1%	47%	48%	+1%
Past 12 months	66%	67%	+1%	50%	50%	0%

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

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
June	70%	71%	+1%	56%	57%	+1%
Jan-Jun	57%	58%	+1%	43%	45%	+2%
Past 12 months	60%	62%	+2%	47%	48%	+1%

*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>June</b>								
Weekday	77%	78%	74%	79%	52%	53%	53%	53%
Weekend	68%	71%	70%	71%	55%	58%	59%	57%
<b>Jan-Jun</b>								
Weekday	59%	66%	65%	66%	39%	44%	44%	45%
Weekend	56%	59%	60%	61%	46%	48%	49%	50%
<b>Past 12 months</b>								
Weekday	61%	68%	68%	68%	42%	46%	47%	47%
Weekend	59%	63%	64%	64%	49%	52%	53%	53%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>June</b>								
Seaside	66%	67%	68%	69%	53%	57%	56%	59%
City/large town	79%	81%	77%	83%	55%	60%	59%	60%
Small town	69%	68%	70%	72%	51%	49%	51%	51%
Countryside	64%	68%	67%	69%	52%	53%	55%	54%
<b>Jan-Jun</b>								
Seaside	48%	51%	51%	54%	37%	41%	40%	43%
City/large town	67%	71%	70%	73%	47%	53%	53%	54%
Small town	50%	57%	59%	61%	46%	39%	41%	42%
Countryside	49%	53%	52%	55%	38%	39%	40%	42%
<b>Past 12 months</b>								
Seaside	54%	56%	56%	58%	43%	46%	46%	47%
City/large town	68%	74%	72%	74%	49%	55%	55%	56%
Small town	54%	60%	61%	63%	45%	42%	44%	44%
Countryside	51%	55%	56%	57%	40%	42%	44%	45%

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## Establishment Type

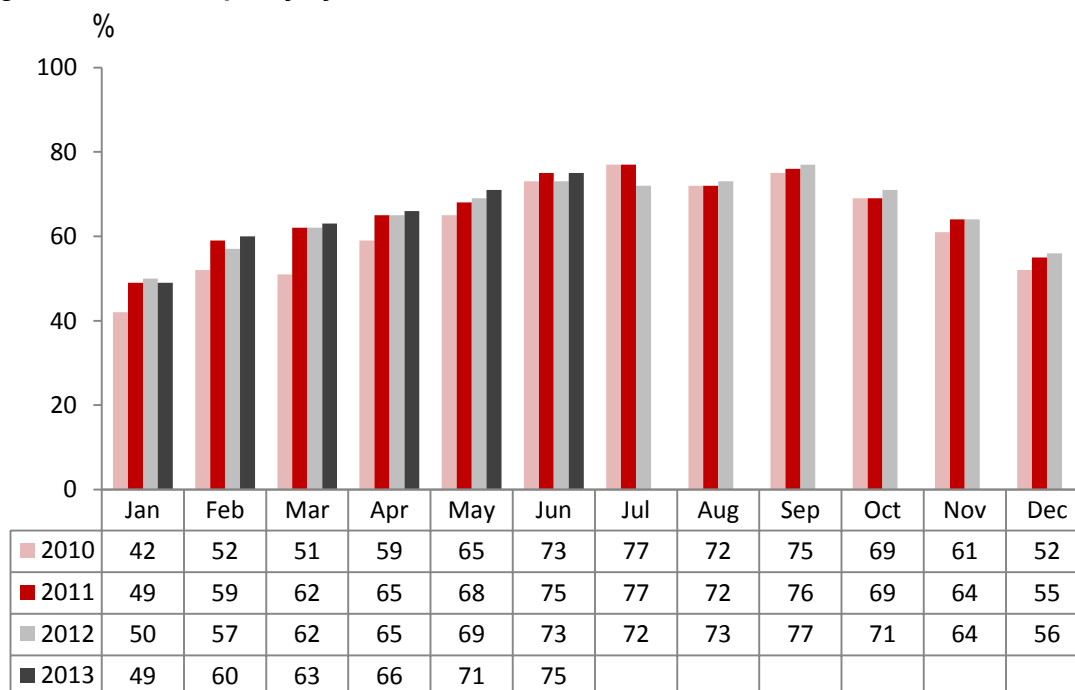
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>June</b>								
Hotel	76%	77%	75%	78%	54%	57%	58%	58%
Guesthouse	65%	65%	65%	64%	51%	54%	55%	51%
B&B	59%	61%	59%	60%	49%	48%	49%	48%
<b>Jan-Jun</b>								
Hotel	62%	66%	66%	68%	46%	49%	49%	51%
Guesthouse	47%	49%	48%	48%	35%	38%	37%	38%
B&B	43%	45%	44%	44%	34%	34%	34%	33%
<b>Past 12 months</b>								
Hotel	64%	69%	69%	70%	48%	51%	52%	52%
Guesthouse	52%	54%	53%	54%	40%	42%	42%	43%
B&B	47%	48%	48%	49%	37%	37%	37%	37%

## Number of rooms

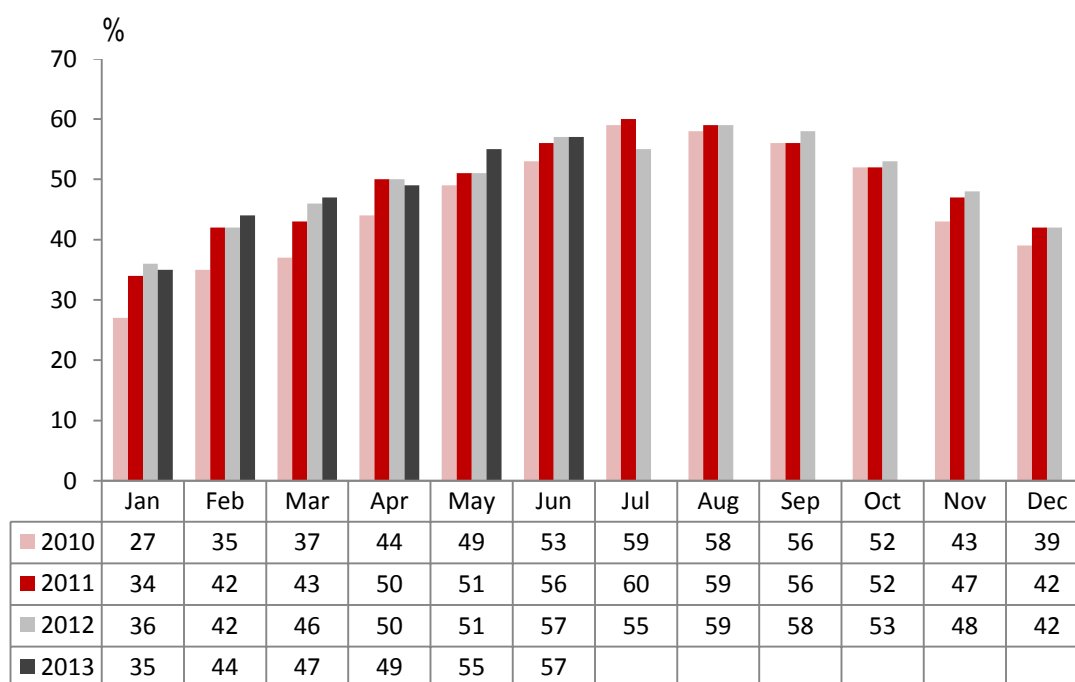
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>June</b>								
1-3 rooms	52%	55%	52%	54%	43%	46%	45%	45%
4-10 rooms	61%	61%	60%	61%	50%	49%	49%	49%
11-25 rooms	66%	66%	64%	67%	51%	51%	52%	51%
26-30 rooms	73%	74%	74%	76%	58%	56%	60%	59%
51-100 rooms	78%	78%	77%	75%	56%	61%	62%	59%
100+ rooms	77%	82%	78%	82%	n/a	56%	57%	57%
<b>Jan-Jun</b>								
1-3 rooms	37%	38%	36%	37%	29%	29%	29%	29%
4-10 rooms	45%	44%	43%	44%	35%	33%	33%	34%
11-25 rooms	50%	53%	52%	52%	39%	40%	38%	38%
26-30 rooms	59%	60%	61%	65%	46%	44%	46%	50%
51-100 rooms	78%	78%	77%	67%	52%	49%	52%	52%
100+ rooms	77%	82%	78%	73%	n/a	51%	51%	52%
<b>Past 12 months</b>								
1-3 rooms	40%	41%	40%	41%	32%	33%	32%	33%
4-10 rooms	50%	49%	49%	49%	40%	39%	38%	38%
11-25 rooms	54%	57%	57%	56%	42%	44%	43%	43%
26-30 rooms	63%	63%	63%	67%	49%	48%	49%	52%
51-100 rooms	68%	68%	70%	70%	54%	52%	54%	55%
100+ rooms	65%	74%	74%	75%	n/a	52%	53%	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>June</b>								
East Midlands	67%	68%	69%	70%	48%	45%	48%	48%
Yorkshire	63%	67%	68%	69%	41%	49%	53%	52%
London	85%	92%	82%	89%	64%	71%	65%	68%
North West	61%	60%	62%	66%	44%	42%	46%	47%
East of England	69%	70%	69%	69%	54%	54%	54%	52%
West Midlands	66%	69%	67%	70%	49%	48%	49%	49%
South West	73%	74%	71%	71%	58%	58%	59%	55%
South East	76%	76%	75%	78%	54%	58%	59%	60%
North East	69%	75%	72%	71%	55%	54%	55%	52%
<b>Jan-Jun</b>								
East Midlands	52%	60%	60%	62%	34%	38%	40%	43%
Yorkshire	52%	57%	56%	60%	38%	40%	41%	45%
London	75%	81%	78%	79%	55%	63%	60%	62%
North West	55%	52%	53%	56%	38%	30%	38%	40%
East of England	54%	58%	58%	58%	42%	44%	44%	43%
West Midlands	55%	61%	60%	63%	43%	43%	42%	44%
South West	54%	58%	56%	57%	41%	44%	43%	43%
South East	52%	60%	62%	64%	46%	44%	46%	47%
North East	53%	62%	55%	56%	37%	44%	39%	40%
<b>Past 12 months</b>								
East Midlands	55%	61%	62%	64%	38%	41%	42%	44%
Yorkshire	57%	59%	60%	62%	45%	42%	45%	47%
London	77%	83%	81%	81%	57%	65%	63%	63%
North West	58%	57%	57%	60%	42%	42%	42%	43%
East of England	57%	60%	61%	61%	45%	46%	48%	47%
West Midlands	56%	63%	62%	64%	43%	45%	44%	46%
South West	58%	61%	61%	60%	46%	47%	47%	47%
South East	54%	63%	63%	67%	45%	46%	48%	49%
North East	58%	61%	63%	57%	40%	43%	46%	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.