

England Occupancy Survey - May 2013

SUMMARY OF RESULTS

- Room occupancy (including STR Global data) increased slightly, by 2%, in May 2013 compared with the same period in 2012 (rising from 69% to 71%). Bedspace Occupancy (including STR Global data) saw a greater increase, up 4% from 51% to 55%. These represent the highest May scores in the last four years, with the increase likely due to the bank holiday in May this year, which took place in June last year.
- Weekday room occupancy in May remained flat against last year, whilst weekend occupancy increased by 4%. For bedspace, weekday rose by 2%, with weekend also up by 4%.
- Room occupancy in countryside and seaside locations saw the greatest increases (at +5% and +4%). This was also true for bedspace occupancy (up 6% and 10%).
- Guesthouses saw the greatest increase in occupancy during May (up 3%), whilst Hotels saw the greatest bedspace occupancy (up 4%).
- Accommodation businesses with 4-10 rooms increased by 6% for both room and bed occupancy, with increases in all categories apart from 51-100 rooms which fell by 3% for room and 1% for bed. Looking at the year so far, the 26-30 room category has seen the greatest increases in occupancy, at +5% for room and +4% for bed.
- Yorkshire and the South West saw the greatest increases in room occupancy during May, up 4% against May last year. The East of England witnessed a very slight decline (-1%) with the West Midlands remaining flat. All other regions saw increases. For bedspace occupancy Yorkshire, the South East and the South West saw the greatest increases (up 7%, 7% and 5% respectively), whereas the East of England remained flat. All other regions experienced an increase on May 2012.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
May	69%	71%	+2%	51%	55%	+4%
Jan-May	61%	62%	+1%	45%	46%	+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	% +/-
May	64%	66%	+2%	48%	53%	+5%
Jan-May	55%	56%	+1%	41%	42%	+1%
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
May								
Weekday	68%	70%	70%	70%	46%	47%	47%	49%
Weekend	67%	66%	67%	71%	56%	53%	56%	60%
Jan-May								
Weekday	56%	63%	63%	64%	36%	42%	42%	43%
Weekend	53%	57%	57%	58%	44%	46%	47%	48%
Past 12 months								
Weekday	60%	61%	68%	68%	41%	43%	47%	47%
Weekend	59%	60%	64%	63%	49%	50%	53%	53%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
May								
Seaside	57%	56%	58%	62%	44%	49%	44%	54%
City/large town	72%	75%	77%	78%	52%	54%	57%	59%
Small town	62%	63%	66%	67%	47%	44%	46%	48%
Countryside	57%	62%	60%	65%	47%	48%	46%	52%
Jan-May								
Seaside	45%	47%	48%	50%	34%	38%	35%	39%
City/large town	65%	69%	69%	69%	45%	51%	50%	52%
Small town	48%	55%	57%	58%	44%	37%	38%	40%
Countryside	45%	51%	49%	52%	35%	36%	37%	40%
Past 12 months								
Seaside	54%	55%	56%	58%	43%	45%	46%	46%
City/large town	68%	71%	73%	73%	49%	54%	55%	55%
Small town	54%	57%	61%	63%	45%	40%	43%	44%
Countryside	51%	54%	56%	57%	40%	42%	44%	45%

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Establishment Type

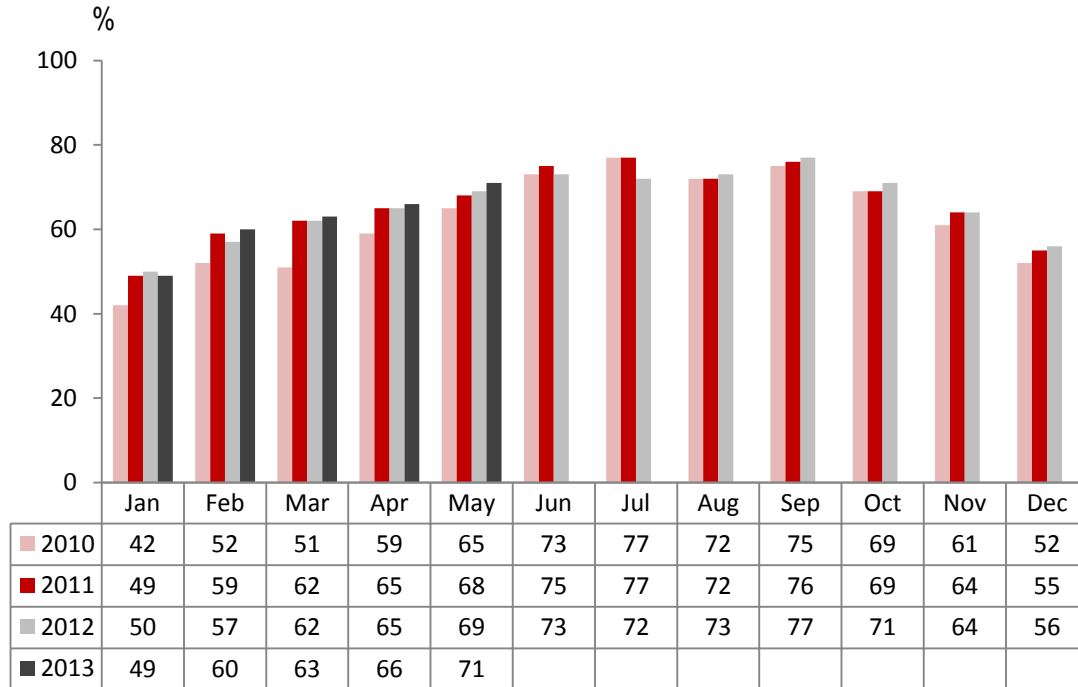
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
May								
Hotel	68%	71%	73%	74%	51%	52%	53%	57%
Guesthouse	56%	56%	57%	60%	44%	46%	46%	49%
B&B	52%	51%	53%	54%	41%	40%	41%	43%
Jan-May								
Hotel	59%	64%	65%	66%	44%	47%	48%	49%
Guesthouse	43%	46%	44%	45%	32%	35%	33%	35%
B&B	40%	42%	41%	41%	30%	31%	31%	30%
Past 12 months								
Hotel	63%	65%	69%	70%	47%	49%	52%	52%
Guesthouse	51%	54%	53%	54%	40%	42%	42%	44%
B&B	47%	48%	48%	49%	37%	38%	37%	38%

Number of rooms

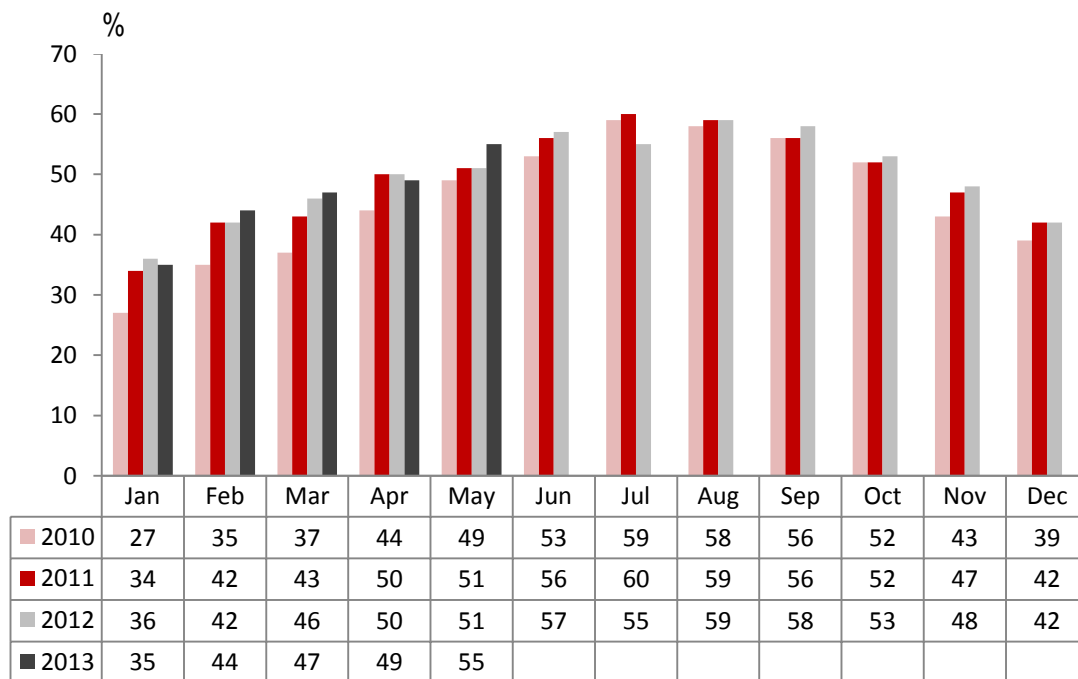
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
May								
1-3 rooms	46%	46%	45%	49%	37%	37%	37%	41%
4-10 rooms	54%	52%	50%	56%	43%	41%	39%	45%
11-25 rooms	58%	57%	56%	60%	45%	44%	42%	45%
26-30 rooms	64%	66%	71%	74%	51%	48%	52%	58%
51-100 rooms	72%	71%	75%	72%	59%	50%	57%	56%
100+ rooms	72%	77%	77%	79%	n/a	54%	54%	57%
Jan-May								
1-3 rooms	34%	34%	33%	34%	26%	26%	25%	26%
4-10 rooms	41%	41%	39%	40%	32%	30%	29%	30%
11-25 rooms	47%	50%	49%	49%	36%	38%	35%	35%
26-30 rooms	57%	57%	58%	63%	44%	41%	44%	48%
51-100 rooms	64%	64%	66%	65%	51%	46%	50%	51%
100+ rooms	62%	70%	70%	71%	n/a	49%	49%	51%
Past 12 months								
1-3 rooms	40%	41%	40%	41%	32%	33%	32%	33%
4-10 rooms	50%	50%	48%	48%	39%	39%	38%	38%
11-25 rooms	54%	57%	57%	56%	42%	44%	43%	43%
26-30 rooms	62%	63%	63%	67%	48%	48%	49%	52%
51-100 rooms	68%	68%	70%	70%	54%	51%	54%	55%
100+ rooms	65%	80%	74%	74%	n/a	n/a	n/a	53%

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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
May								
East Midlands	60%	63%	65%	66%	45%	41%	43%	46%
Yorkshire	61%	62%	63%	67%	47%	40%	45%	52%
London	76%	85%	83%	85%	57%	65%	65%	67%
North West	56%	55%	57%	58%	41%	38%	40%	42%
East of England	61%	62%	66%	65%	48%	48%	50%	50%
West Midlands	70%	65%	67%	67%	56%	46%	47%	49%
South West	64%	66%	62%	66%	50%	51%	48%	53%
South East	63%	66%	71%	74%	48%	53%	52%	59%
North East	56%	70%	63%	66%	46%	50%	46%	49%
Jan-May								
East Midlands	49%	59%	58%	59%	32%	37%	38%	41%
Yorkshire	50%	55%	54%	58%	38%	37%	39%	43%
London	72%	78%	77%	77%	52%	61%	59%	60%
North West	54%	50%	53%	54%	37%	35%	36%	38%
East of England	52%	55%	55%	55%	38%	41%	42%	42%
West Midlands	53%	60%	59%	61%	41%	42%	41%	43%
South West	50%	55%	53%	54%	38%	41%	40%	40%
South East	48%	57%	59%	61%	46%	42%	43%	45%
North East	51%	60%	51%	53%	35%	41%	36%	37%
Past 12 months								
East Midlands	54%	60%	62%	64%	38%	40%	42%	44%
Yorkshire	57%	56%	60%	62%	45%	39%	45%	47%
London	76%	84%	82%	80%	56%	71%	63%	63%
North West	58%	52%	57%	59%	41%	40%	41%	43%
East of England	57%	57%	61%	61%	43%	46%	48%	47%
West Midlands	57%	60%	62%	64%	43%	49%	44%	46%
South West	58%	59%	61%	60%	46%	47%	47%	47%
South East	53%	57%	63%	66%	45%	42%	48%	49%
North East	58%	55%	64%	57%	40%	39%	46%	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.