

England Occupancy Survey - August 2014

SUMMARY OF RESULTS

- Room occupancy in August showed an increase of +2%, rising to 79%, whilst bedspace occupancy fell back slightly, by -1% to 63%. Looking at the year to date, both room and bedspace occupancy are up, by +2% and +1% respectively.
- Weekday occupancy in August was up for both room and bedspace occupancy (+2% and +1%), with weekend occupancy flat for room (0%) and -1% for bedspace.
- Both small town and countryside locations saw declines for both room and bedspace occupancy, with small towns dropping -2% for room and -2% for bedspace, and countryside dropping -1% for room and -3% for bedspace. Seaside and city/large town locations saw increases for room occupancy in August (+3% and +2%), with bedspace occupancy for seaside down -1% and flat (0%) for city/large towns.
- Looking at occupancy by establishment type, hotels and guesthouses saw +1% increases in room occupancy each, with B&B's flat (0%). For bedspace, there were declines in each, of -1% for hotels, and -2% for both guesthouses and B&B's.
- When looking at occupancy figures for August by number of rooms, the 100+ room category saw the biggest uplift for room occupancy (+3%), followed by the 4-10 room category (+2%). The remainder were either flat or down for the month. Looking at bedspace, the largest uplift was in the 51-100 room category, with the 11-25 category seeing the biggest decline (-5%)
- There were increases this month for room occupancy across almost all regions, apart from the North West and the North East (with -2% and -5% declines respectively). The biggest uplift was seen in the South East (+4%), the East of England (+3%) and the West Midlands (+3%). The picture was a little more mixed for bedspace, with the West Midlands seeing the biggest increase (+3%), followed by the East of England and the South West (+2% each). As with room occupancy, the biggest decline in bedspace was in the North East.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
August	77%	79%	+2%	64%	63%	-1%
Jan-Aug	67%	69%	+2%	51%	52%	+1%
Past 12 months	68%	69%	+1%	51%	51%	0%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
August	75%	75%	0%	67%	65%	-2%
Jan-Aug	61%	62%	+1%	48%	48%	0%
Past 12 months	63%	62%	-1%	49%	47%	-2%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
August								
Weekday	72%	71%	76%	78%	55%	54%	58%	59%
Weekend	74%	74%	78%	78%	64%	64%	67%	66%
Jan-Aug								
Weekday	68%	67%	69%	71%	47%	46%	48%	50%
Weekend	63%	62%	65%	65%	52%	52%	54%	53%
Past 12 months								
Weekday	68%	67%	69%	71%	46%	46%	48%	49%
Weekend	63%	63%	65%	65%	52%	52%	54%	53%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
August								
Seaside	74%	73%	79%	82%	68%	60%	76%	75%
City/large town	72%	75%	81%	83%	58%	58%	64%	64%
Small town	68%	71%	73%	71%	53%	52%	56%	54%
Countryside	69%	69%	76%	75%	58%	60%	65%	62%
Jan-Aug								
Seaside	57%	57%	59%	61%	48%	45%	46%	48%
City/large town	73%	72%	76%	77%	55%	54%	57%	57%
Small town	61%	62%	65%	64%	42%	44%	46%	46%
Countryside	57%	55%	56%	59%	44%	44%	44%	46%
Past 12 months								
Seaside	56%	56%	60%	60%	46%	45%	50%	46%
City/large town	73%	72%	75%	78%	55%	54%	57%	57%
Small town	60%	62%	64%	65%	42%	43%	45%	45%
Countryside	56%	56%	59%	59%	43%	44%	46%	46%

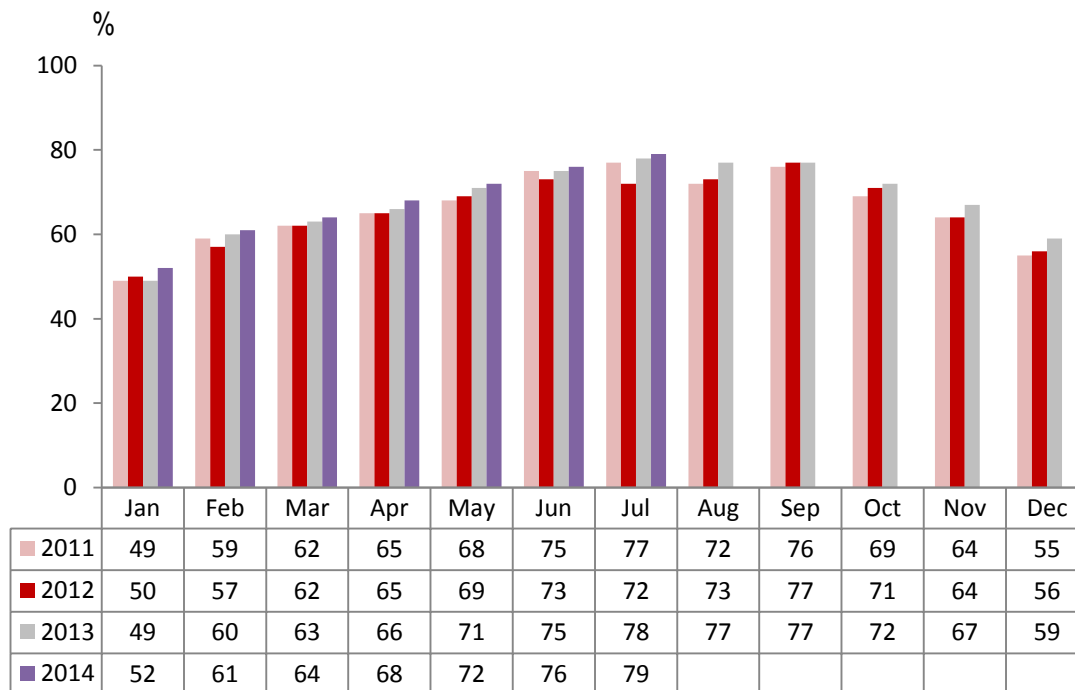
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
August								
Hotel	73%	75%	79%	80%	59%	59%	65%	64%
Guesthouse	71%	69%	73%	74%	62%	61%	63%	61%
B&B	67%	63%	68%	68%	55%	54%	58%	60%
Jan-Aug								
Hotel	69%	68%	71%	72%	51%	51%	53%	54%
Guesthouse	55%	54%	55%	56%	44%	43%	44%	44%
B&B	50%	49%	50%	51%	39%	39%	39%	41%
Past 12 months								
Hotel	69%	69%	71%	72%	51%	51%	54%	53%
Guesthouse	53%	53%	54%	55%	42%	43%	43%	42%
B&B	50%	49%	49%	50%	37%	37%	38%	39%

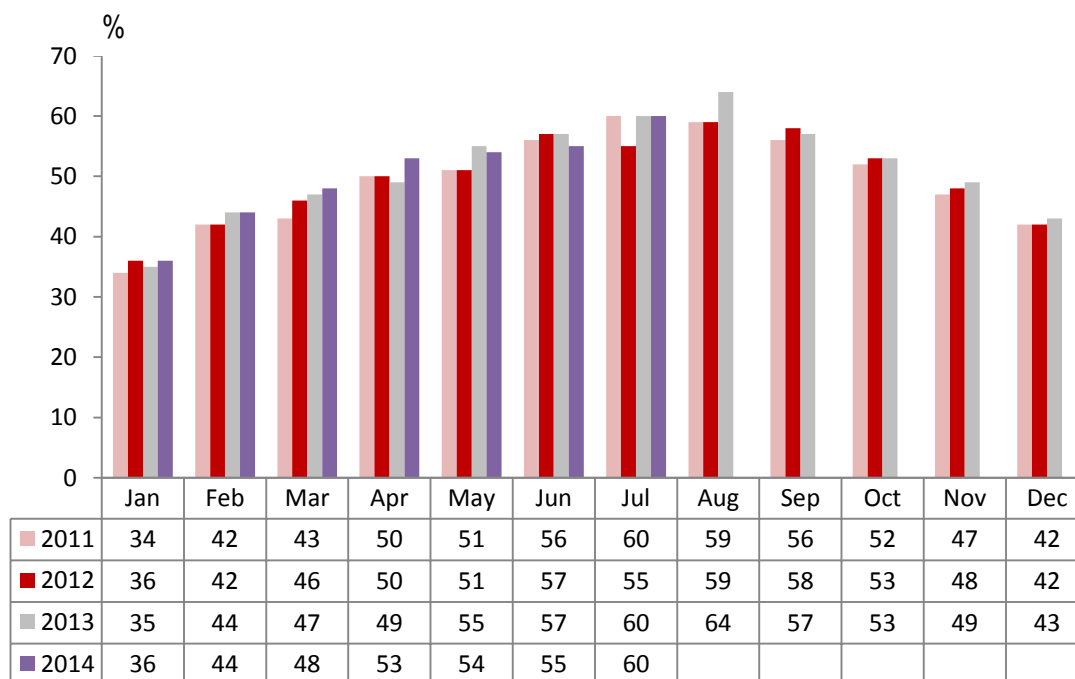
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
August								
1-3 rooms	59%	56%	61%	61%	51%	49%	53%	54%
4-10 rooms	69%	66%	71%	73%	60%	58%	61%	65%
11-25 rooms	67%	66%	73%	71%	56%	56%	62%	57%
26-30 rooms	69%	73%	80%	77%	57%	62%	69%	67%
51-100 rooms	75%	77%	78%	78%	64%	65%	67%	73%
100+ rooms	76%	77%	80%	83%	57%	58%	61%	63%
Jan-Aug								
1-3 rooms	43%	41%	43%	43%	35%	34%	35%	36%
4-10 rooms	50%	49%	51%	52%	39%	39%	41%	41%
11-25 rooms	57%	55%	58%	61%	45%	43%	44%	46%
26-30 rooms	63%	64%	69%	68%	48%	50%	54%	54%
51-100 rooms	69%	70%	68%	66%	53%	54%	54%	54%
100+ rooms	74%	73%	76%	77%	53%	52%	54%	55%
Past 12 months								
1-3 rooms	41%	40%	41%	42%	32%	32%	33%	34%
4-10 rooms	49%	49%	49%	51%	38%	38%	39%	40%
11-25 rooms	57%	56%	58%	61%	44%	43%	44%	46%
26-30 rooms	63%	63%	69%	68%	48%	49%	54%	53%
51-100 rooms	69%	69%	70%	65%	53%	54%	56%	53%
100+ rooms	74%	74%	76%	77%	53%	52%	54%	55%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
August								
East Midlands	66%	72%	73%	74%	51%	51%	54%	54%
Yorkshire	69%	69%	74%	76%	55%	56%	61%	61%
London	80%	80%	85%	86%	65%	67%	71%	69%
North West	62%	64%	69%	67%	49%	51%	54%	54%
East of England	66%	71%	72%	75%	58%	57%	60%	62%
West Midlands	64%	66%	68%	71%	49%	50%	52%	55%
South West	77%	72%	81%	82%	65%	62%	69%	71%
South East	74%	75%	79%	83%	61%	58%	68%	66%
North East	71%	64%	69%	64%	54%	49%	51%	47%
Jan-Aug								
East Midlands	62%	62%	65%	63%	41%	42%	46%	45%
Yorkshire	60%	60%	64%	66%	44%	45%	48%	49%
London	82%	79%	81%	81%	64%	61%	64%	63%
North West	55%	56%	60%	60%	40%	41%	43%	44%
East of England	61%	61%	62%	66%	48%	47%	47%	50%
West Midlands	63%	62%	64%	67%	45%	44%	46%	48%
South West	62%	60%	63%	64%	49%	48%	49%	50%
South East	64%	65%	67%	71%	49%	49%	48%	51%
North East	65%	58%	59%	58%	46%	42%	43%	42%
Past 12 months								
East Midlands	61%	62%	65%	64%	41%	42%	45%	44%
Yorkshire	60%	60%	63%	66%	44%	45%	47%	49%
London	83%	80%	82%	82%	65%	62%	64%	63%
North West	56%	57%	61%	61%	41%	42%	44%	44%
East of England	61%	61%	62%	66%	46%	47%	47%	49%
West Midlands	63%	63%	65%	67%	45%	44%	46%	48%
South West	61%	60%	61%	63%	47%	47%	48%	49%
South East	63%	64%	68%	69%	47%	48%	51%	49%
North East	63%	62%	57%	57%	44%	44%	41%	41%

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.