

England Occupancy Survey - July 2014

SUMMARY OF RESULTS

- Room occupancy in July showed a very slight increase, of +1%, rising to 79%, whilst bedspace occupancy remained flat, at 60%. Looking at the year to date, both room and bedspace occupancy are flat (0%).
- Weekday occupancy in July was up slightly for both room and bedspace (+1%), but remained flat for weekend.
- Countryside locations were the only locations to witness a slight increase in both room and bedspace occupancy (+1%). Seaside locations saw the biggest decline in both room and bedspace occupancy in July, with room falling -3% and bedspace -6%. Occupancy levels in both large and small towns remained flat.
- Looking at occupancy by establishment type, B&B occupancy increased for both room and bedspace occupancy (+3% and +4% respectively), whereas guesthouse occupancy fell -2% for both room and bedspace. Hotel occupancy remained flat in July (+1% for room and 0% for bed).
- When looking at occupancy figures for July by number of rooms, the 1-3 room category saw the biggest uplift (+4% for room and +5% for bed). The 51-100 room category also saw a big uplift for bedspace occupancy (+9%), however, room occupancy actually fell in this category, by -2%.
- There were increases this month across all regions, apart from London, who witnessed a decline of -2% for room and -4% for bedspace occupancy. The regions with the largest increases this month were Yorkshire, East of England and the West Midlands who each witnessed a +4% increase in room occupancy.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
July	78%	79%	+1%	60%	60%	0%
Jan-Jul	67%	67%	0%	50%	50%	0%
Past 12 months	67%	69%	+2%	51%	51%	0%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
July	75%	75%	0%	64%	62%	-2%
Jan-Jul	61%	61%	0%	48%	46%	-2%
Past 12 months	62%	62%	0%	49%	48%	-1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
July								
Weekday	80%	74%	79%	80%	56%	52%	56%	57%
Weekend	75%	68%	75%	75%	63%	57%	63%	63%
Jan-Jul								
Weekday	68%	66%	68%	70%	46%	45%	47%	49%
Weekend	62%	61%	63%	63%	51%	50%	52%	51%
Past 12 months								
Weekday	68%	67%	69%	71%	46%	46%	48%	49%
Weekend	63%	63%	64%	65%	52%	52%	53%	53%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
July								
Seaside	70%	69%	77%	74%	62%	57%	70%	64%
City/large town	82%	76%	83%	84%	63%	58%	61%	61%
Small town	74%	73%	76%	76%	54%	52%	54%	55%
Countryside	69%	60%	72%	73%	56%	50%	58%	59%
Jan-Jul								
Seaside	54%	54%	58%	58%	44%	42%	48%	44%
City/large town	73%	71%	75%	76%	54%	53%	56%	56%
Small town	60%	61%	63%	63%	41%	43%	44%	45%
Countryside	56%	53%	58%	57%	42%	42%	44%	44%
Past 12 months								
Seaside	56%	56%	59%	60%	46%	46%	48%	46%
City/large town	73%	72%	75%	77%	55%	54%	56%	57%
Small town	60%	61%	64%	65%	42%	43%	45%	45%
Countryside	55%	56%	58%	59%	43%	44%	46%	46%

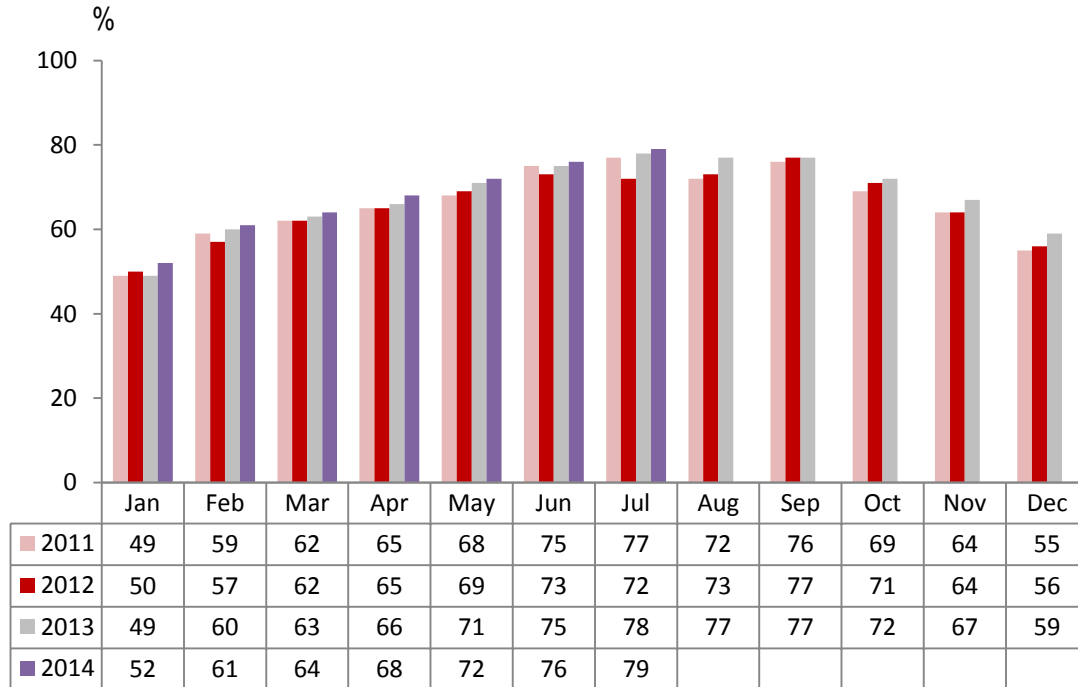
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
July								
Hotel	79%	74%	80%	81%	61%	55%	61%	61%
Guesthouse	70%	68%	71%	69%	60%	58%	58%	56%
B&B	65%	62%	63%	66%	53%	50%	52%	56%
Jan-Jul								
Hotel	68%	67%	70%	71%	50%	50%	53%	52%
Guesthouse	52%	51%	52%	53%	41%	41%	41%	41%
B&B	48%	47%	47%	48%	36%	36%	36%	38%
Past 12 months								
Hotel	69%	68%	71%	72%	51%	51%	53%	53%
Guesthouse	54%	53%	54%	55%	42%	42%	43%	42%
B&B	48%	48%	49%	50%	37%	37%	38%	39%

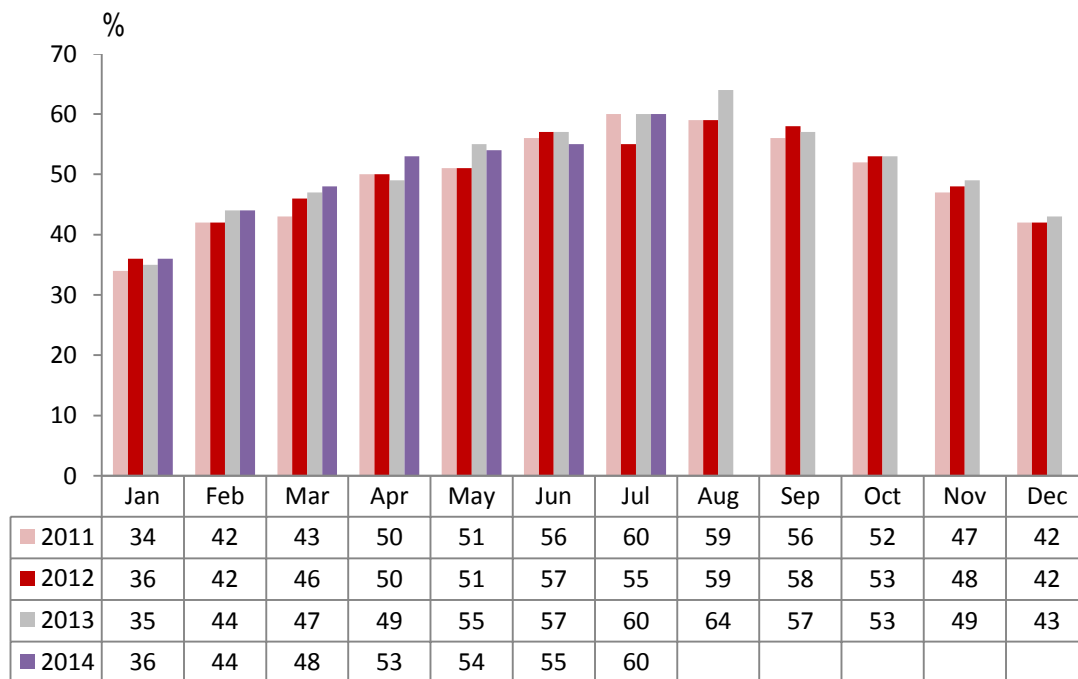
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
July								
1-3 rooms	59%	55%	56%	60%	50%	47%	47%	52%
4-10 rooms	66%	63%	66%	67%	55%	52%	55%	56%
11-25 rooms	71%	64%	73%	73%	57%	53%	59%	57%
26-30 rooms	76%	73%	80%	79%	60%	59%	65%	65%
51-100 rooms	78%	71%	80%	78%	61%	55%	66%	75%
100+ rooms	84%	78%	83%	84%	60%	55%	58%	59%
Jan-Jul								
1-3 rooms	41%	39%	40%	41%	32%	31%	32%	33%
4-10 rooms	47%	46%	48%	48%	36%	36%	37%	37%
11-25 rooms	56%	54%	55%	59%	43%	41%	41%	44%
26-30 rooms	62%	63%	67%	67%	46%	48%	52%	52%
51-100 rooms	68%	68%	69%	64%	51%	52%	54%	52%
100+ rooms	74%	72%	75%	76%	n/a	51%	53%	54%
Past 12 months								
1-3 rooms	41%	40%	41%	42%	33%	32%	33%	34%
4-10 rooms	49%	49%	49%	50%	39%	38%	39%	39%
11-25 rooms	57%	56%	57%	61%	44%	43%	43%	46%
26-30 rooms	64%	63%	68%	69%	48%	49%	53%	54%
51-100 rooms	69%	69%	70%	65%	52%	53%	55%	53%
100+ rooms	74%	74%	75%	77%	n/a	n/a	53%	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
July								
East Midlands	71%	70%	74%	71%	49%	47%	51%	54%
Yorkshire	71%	68%	73%	77%	54%	52%	56%	58%
London	92%	80%	88%	86%	73%	62%	69%	65%
North West	65%	64%	69%	70%	49%	48%	50%	52%
East of England	75%	70%	73%	77%	59%	53%	56%	58%
West Midlands	67%	67%	69%	73%	49%	48%	49%	52%
South West	76%	70%	77%	79%	62%	57%	61%	64%
South East	79%	77%	82%	84%	63%	60%	67%	64%
North East	74%	71%	66%	67%	55%	52%	49%	48%
Jan-Jul								
East Midlands	62%	61%	64%	62%	40%	41%	44%	43%
Yorkshire	59%	58%	62%	65%	42%	43%	46%	48%
London	82%	78%	80%	80%	64%	60%	63%	62%
North West	54%	55%	58%	59%	38%	40%	41%	42%
East of England	60%	59%	60%	64%	46%	45%	45%	48%
West Midlands	62%	61%	64%	66%	44%	43%	45%	47%
South West	60%	58%	60%	61%	46%	45%	46%	47%
South East	63%	64%	67%	69%	47%	48%	50%	49%
North East	64%	57%	58%	57%	45%	41%	41%	42%
Past 12 months								
East Midlands	61%	62%	65%	64%	41%	42%	45%	44%
Yorkshire	59%	60%	63%	66%	43%	45%	47%	49%
London	83%	80%	81%	82%	65%	62%	64%	63%
North West	57%	57%	60%	61%	42%	42%	43%	44%
East of England	61%	61%	62%	66%	46%	47%	47%	49%
West Midlands	62%	62%	65%	67%	45%	44%	46%	47%
South West	61%	60%	60%	63%	47%	47%	47%	49%
South East	63%	64%	67%	69%	46%	48%	50%	49%
North East	62%	62%	57%	58%	44%	45%	41%	44%

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.