

England Occupancy Survey - June 2014

SUMMARY OF RESULTS

- Room occupancy in June showed a very slight increase, of +1%, rising to 76%, whilst bedspace occupancy showed a decrease, by -2% to 55%. Both measures of occupancy are up when looking at the year so far (+4% for room and +3% for bed).
- Weekday occupancy in June was flat for room (0%), at 79%, whilst bedspace occupancy increased only slightly (+1%) when compared to June last year. However, both weekday and weekend occupancy levels are up for both room and bedspace for the year to date.
- Room occupancy levels were either flat or down across all location types, with countryside locations showing the biggest decline (-2%). Looking at bedspace, occupancy levels were down across all location types, with seaside locations showing the greatest decline (-8%).
- Looking at occupancy by establishment type, hotel and B&B occupancy increased slightly for room occupancy (+1%), with bedspace occupancy falling slightly for hotels and guesthouses (-2% and -1%).
- When looking at occupancy figures for June by number of rooms, the 11-25 room category was the only category to see increases for both room and bedspace occupancy (+2%). The 51-100 room category also rose slightly (+1%), with bedspace falling -3%, whilst the 26-30 category dropped -1% for room and rose +2% for bedspace.
- Yorkshire, the South West and the South East saw the biggest increases in room occupancy rates (+2%), with the North East seeing the biggest decreases (-3%). Looking at bedspace occupancy, the only region to see an increase was the South West (+1%), with the biggest declines in occupancy seen in the South East and the North East (-5% and -3%). Looking at the year-to-date all regions have seen a rise in occupancy for both room and bedspace.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
June	75%	76%	+1%	57%	55%	-2%
Jan-Jun	64%	68%	+4%	48%	51%	+3%
Past 12 months	67%	68%	+1%	50%	51%	+1%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
June	71%	70%	-1%	57%	54%	-3%
Jan-Jun	58%	61%	+3%	45%	46%	+1%
Past 12 months	62%	62%	0%	48%	48%	0%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
June								
Weekday	78%	74%	79%	79%	53%	53%	53%	54%
Weekend	71%	70%	71%	70%	58%	59%	57%	57%
Jan-Jun								
Weekday	66%	65%	66%	71%	44%	44%	45%	49%
Weekend	59%	60%	61%	65%	48%	49%	50%	52%
Past 12 months								
Weekday	68%	68%	68%	71%	46%	47%	47%	49%
Weekend	63%	64%	64%	65%	52%	53%	53%	53%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
June								
Seaside	67%	68%	69%	68%	57%	56%	59%	51%
City/large town	81%	77%	83%	83%	60%	59%	60%	59%
Small town	68%	70%	72%	72%	49%	51%	51%	50%
Countryside	68%	67%	69%	67%	53%	55%	54%	53%
Jan-Jun								
Seaside	51%	51%	54%	58%	41%	40%	43%	43%
City/large town	71%	70%	73%	78%	53%	53%	54%	58%
Small town	57%	59%	61%	64%	39%	41%	42%	45%
Countryside	53%	52%	55%	57%	39%	40%	42%	44%
Past 12 months								
Seaside	56%	56%	58%	60%	46%	46%	47%	45%
City/large town	74%	72%	74%	77%	55%	55%	56%	57%
Small town	60%	61%	63%	65%	42%	44%	44%	45%
Countryside	55%	56%	57%	59%	42%	44%	45%	46%

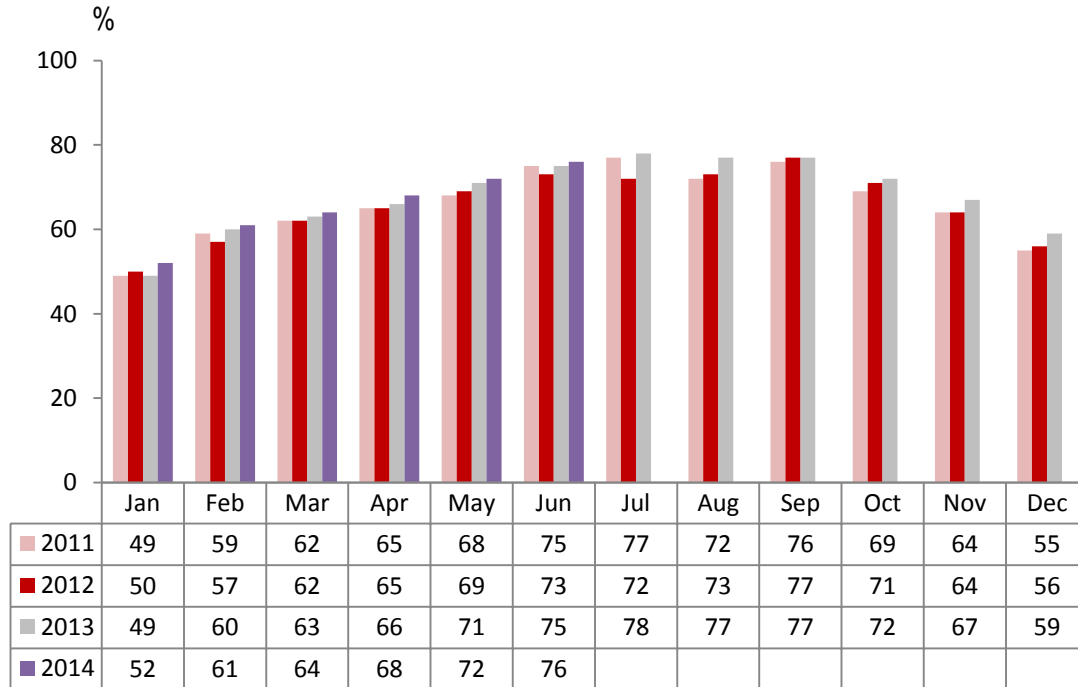
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
June								
Hotel	77%	75%	78%	79%	57%	58%	58%	56%
Guesthouse	65%	65%	64%	63%	54%	55%	51%	50%
B&B	61%	59%	60%	61%	48%	49%	48%	50%
Jan-Jun								
Hotel	66%	66%	68%	72%	49%	49%	51%	53%
Guesthouse	49%	48%	48%	53%	38%	37%	38%	41%
B&B	45%	44%	44%	48%	34%	34%	33%	38%
Past 12 months								
Hotel	69%	69%	70%	72%	51%	52%	52%	53%
Guesthouse	54%	53%	54%	55%	42%	42%	43%	43%
B&B	48%	48%	49%	49%	37%	37%	37%	39%

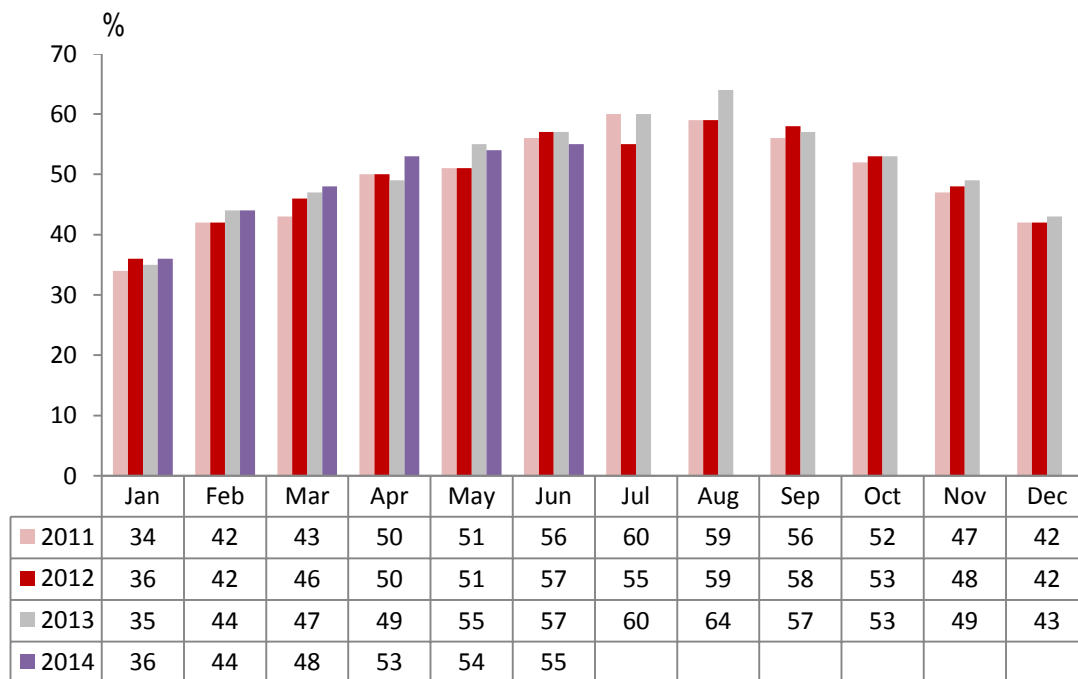
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
June								
1-3 rooms	55%	52%	54%	54%	46%	45%	45%	45%
4-10 rooms	61%	60%	61%	60%	49%	49%	49%	48%
11-25 rooms	66%	64%	67%	69%	51%	52%	51%	53%
26-30 rooms	74%	74%	76%	75%	56%	60%	59%	61%
51-100 rooms	78%	77%	75%	76%	61%	62%	59%	56%
100+ rooms	82%	78%	82%	82%	56%	57%	57%	56%
Jan-Jun								
1-3 rooms	38%	36%	37%	40%	29%	29%	29%	32%
4-10 rooms	44%	43%	44%	47%	33%	33%	34%	37%
11-25 rooms	53%	52%	52%	59%	40%	38%	38%	44%
26-30 rooms	60%	61%	65%	68%	44%	46%	50%	53%
51-100 rooms	78%	77%	67%	66%	49%	52%	52%	52%
100+ rooms	82%	78%	73%	78%	51%	51%	52%	55%
Past 12 months								
1-3 rooms	41%	40%	41%	41%	33%	32%	33%	34%
4-10 rooms	49%	49%	49%	50%	39%	38%	38%	39%
11-25 rooms	57%	57%	56%	61%	44%	43%	43%	46%
26-30 rooms	63%	63%	67%	69%	48%	49%	52%	54%
51-100 rooms	68%	70%	70%	66%	52%	54%	55%	53%
100+ rooms	74%	74%	75%	77%	52%	53%	53%	54%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
June								
East Midlands	68%	69%	70%	70%	45%	48%	48%	46%
Yorkshire	67%	68%	69%	71%	49%	53%	52%	51%
London	92%	82%	89%	87%	71%	65%	68%	66%
North West	60%	62%	66%	64%	42%	46%	47%	46%
East of England	70%	69%	69%	70%	54%	54%	52%	51%
West Midlands	69%	67%	70%	70%	48%	49%	49%	49%
South West	74%	71%	71%	73%	58%	59%	55%	56%
South East	76%	75%	78%	80%	58%	59%	60%	55%
North East	75%	72%	71%	68%	54%	55%	52%	49%
Jan-Jun								
East Midlands	60%	60%	62%	64%	38%	40%	43%	44%
Yorkshire	57%	56%	60%	66%	40%	41%	45%	49%
London	81%	78%	79%	82%	63%	60%	62%	64%
North West	52%	53%	56%	59%	30%	38%	40%	43%
East of England	58%	58%	58%	64%	44%	44%	43%	48%
West Midlands	61%	60%	63%	68%	43%	42%	44%	49%
South West	58%	56%	57%	61%	44%	43%	43%	47%
South East	60%	62%	64%	69%	44%	46%	47%	49%
North East	62%	55%	56%	59%	44%	39%	40%	43%
Past 12 months								
East Midlands	61%	62%	64%	64%	41%	42%	44%	44%
Yorkshire	59%	60%	62%	65%	42%	45%	47%	49%
London	83%	81%	81%	82%	65%	63%	63%	64%
North West	57%	57%	60%	61%	42%	42%	43%	44%
East of England	60%	61%	61%	65%	46%	48%	47%	49%
West Midlands	63%	62%	64%	66%	45%	44%	46%	47%
South West	61%	61%	60%	62%	47%	47%	47%	48%
South East	63%	63%	67%	69%	46%	48%	49%	49%
North East	61%	63%	57%	58%	43%	46%	41%	42%

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.