

England Occupancy Survey - July 2015

SUMMARY OF RESULTS

- Room occupancy in July was up by +1% (to 80%), with bedspace occupancy remaining flat at 60%. If we compare to July 2012, there has been an increase of +6% for room occupancy in the month of July, and +5% to 60% for bedspace.
- Both weekday and weekend room occupancy increased slightly, by +1% to 81% and 76% respectively. For bedspace occupancy, weekday occupancy remained flat at 57%, with weekend up +1% to 64%.
- Seaside occupancy in July was up +3% to 77% for room and -3% for bedspace occupancy. City/large towns remained flat at 84%, with bedspace occupancy up +1% to 62%. Small town occupancy rose by +1% for room and +2% for bed (77% and 57%), with countryside occupancy up +1% for room and flat for bedspace (74% and 59%).
- Looking at occupancy by establishment type, B&B's saw occupancy increase by +3% for room and +2% for bed. Hotels occupancy increased by +1% for room and 0% for bed, with guest house showing a 0% increase for room and a +1% increase for bedspace.
- Looking at occupancy rates by number of rooms, the 4-10 room category and the 51-100 room category increased by +2% for room occupancy, with the rest of the categories either showing no change or down by 1%. For bedspace occupancy, the 11-25 and the 51-100 room categories saw the greatest uplifts.
- Looking at occupancy by region, the East of England and the West Midlands saw the biggest increases in room occupancy (+3% each respectively), followed by the South West (+2%). For bedspace occupancy the South East saw the biggest decline (-5%) with the West Midlands seeing the biggest increase (+3%).

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
July	79%	80%	+1%	60%	60%	0%
Jan-Jul	67%	68%	+1%	50%	50%	0%
Past 12 months	69%	70%	+1%	51%	52%	+1%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
July	75%	76%	+1%	62%	60%	-2%
Jan-Jul	61%	61%	0%	46%	46%	0%
Past 12 months	62%	63%	+1%	48%	48%	0%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
July								
Weekday	74%	79%	80%	81%	52%	56%	57%	57%
Weekend	68%	75%	75%	76%	57%	63%	63%	64%
Jan-Jul								
Weekday	66%	68%	70%	71%	45%	47%	49%	49%
Weekend	61%	63%	63%	64%	50%	52%	51%	53%
Past 12 months								
Weekday	67%	69%	71%	72%	46%	48%	49%	49%
Weekend	63%	64%	65%	67%	52%	53%	53%	55%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
July								
Seaside	69%	77%	74%	77%	57%	70%	64%	61%
City/large town	76%	83%	84%	84%	58%	61%	61%	62%
Small town	73%	76%	76%	77%	52%	54%	55%	57%
Countryside	60%	72%	73%	74%	50%	58%	59%	59%
Jan-Jul								
Seaside	54%	58%	58%	60%	42%	48%	44%	46%
City/large town	71%	75%	76%	76%	53%	56%	56%	56%
Small town	61%	63%	63%	65%	43%	44%	45%	46%
Countryside	53%	58%	57%	59%	42%	44%	44%	45%
Past 12 months								
Seaside	56%	59%	60%	62%	46%	48%	46%	48%
City/large town	72%	75%	77%	78%	54%	56%	57%	57%
Small town	61%	64%	65%	66%	43%	45%	45%	47%
Countryside	56%	58%	59%	60%	44%	46%	46%	46%

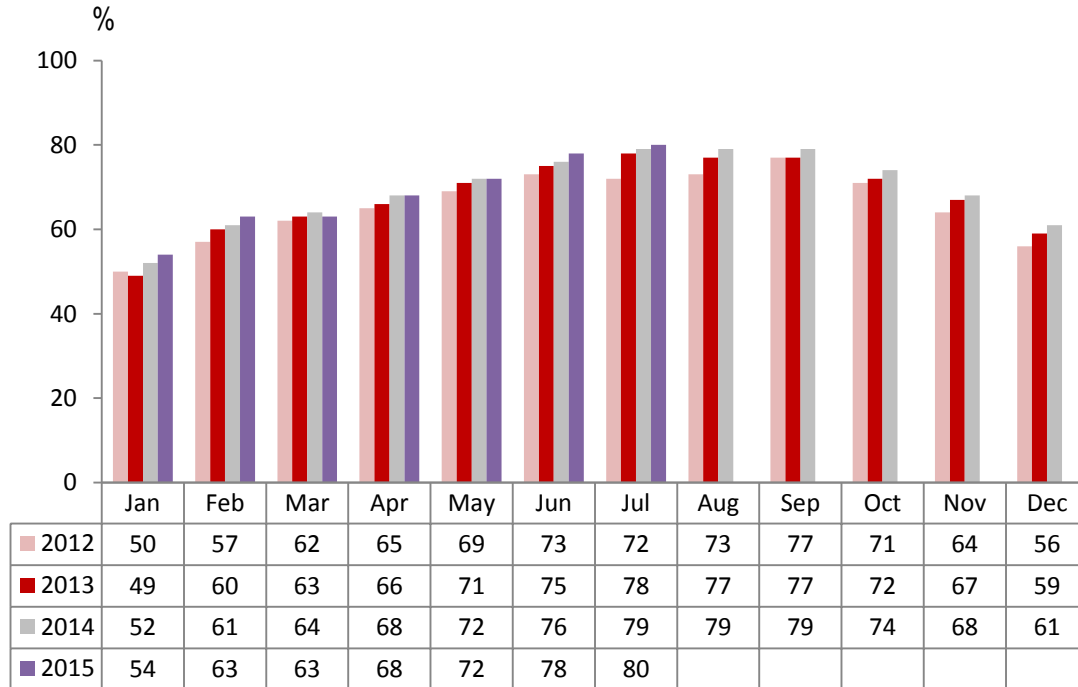
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
July								
Hotel	74%	80%	81%	82%	55%	61%	61%	61%
Guesthouse	68%	71%	69%	69%	58%	58%	56%	57%
B&B	62%	63%	66%	69%	50%	52%	56%	58%
Jan-Jul								
Hotel	67%	70%	71%	72%	50%	53%	52%	52%
Guesthouse	51%	52%	53%	53%	41%	41%	41%	42%
B&B	47%	47%	48%	52%	36%	36%	38%	41%
Past 12 months								
Hotel	68%	71%	72%	73%	51%	53%	53%	54%
Guesthouse	53%	54%	55%	55%	42%	43%	42%	43%
B&B	48%	49%	50%	53%	37%	38%	39%	42%

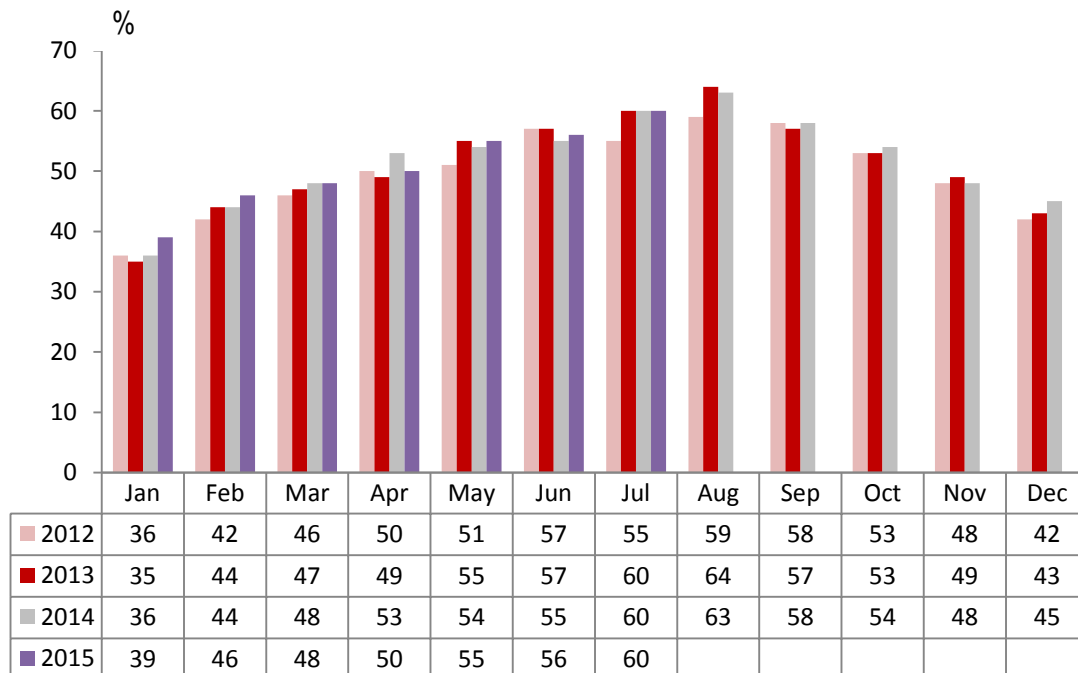
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
July								
1-3 rooms	55%	56%	60%	60%	47%	47%	52%	51%
4-10 rooms	63%	66%	67%	69%	52%	55%	56%	57%
11-25 rooms	64%	73%	73%	73%	53%	59%	57%	60%
26-30 rooms	73%	80%	79%	78%	59%	65%	65%	65%
51-100 rooms	71%	80%	78%	80%	55%	66%	75%	61%
100+ rooms	78%	83%	84%	85%	55%	58%	59%	60%
Jan-Jul								
1-3 rooms	39%	40%	41%	44%	31%	32%	33%	34%
4-10 rooms	46%	48%	48%	51%	36%	37%	37%	40%
11-25 rooms	54%	55%	59%	59%	41%	41%	44%	46%
26-30 rooms	63%	67%	67%	65%	48%	52%	52%	52%
51-100 rooms	68%	69%	64%	67%	52%	54%	52%	50%
100+ rooms	72%	75%	76%	77%	51%	53%	54%	54%
Past 12 months								
1-3 rooms	40%	41%	42%	45%	32%	33%	34%	35%
4-10 rooms	49%	49%	50%	53%	38%	39%	39%	42%
11-25 rooms	56%	57%	61%	61%	43%	43%	46%	47%
26-30 rooms	63%	68%	69%	68%	49%	53%	54%	53%
51-100 rooms	69%	70%	65%	68%	53%	55%	53%	51%
100+ rooms	74%	75%	77%	78%	n/a	53%	55%	55%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
July								
East Midlands	70%	74%	71%	71%	47%	51%	54%	56%
Yorkshire	68%	73%	77%	77%	52%	56%	58%	60%
London	80%	88%	86%	87%	62%	69%	65%	67%
North West	64%	69%	70%	69%	48%	50%	52%	51%
East of England	70%	73%	77%	80%	53%	56%	58%	59%
West Midlands	67%	69%	73%	76%	48%	49%	52%	55%
South West	70%	77%	79%	81%	57%	61%	64%	66%
South East	77%	82%	84%	84%	60%	67%	64%	59%
North East	71%	66%	67%	68%	52%	49%	48%	49%
Jan-Jul								
East Midlands	61%	64%	62%	62%	41%	44%	43%	45%
Yorkshire	58%	62%	65%	65%	43%	46%	48%	49%
London	78%	80%	80%	79%	60%	63%	62%	60%
North West	55%	58%	59%	60%	40%	41%	42%	43%
East of England	59%	60%	64%	67%	45%	45%	48%	48%
West Midlands	61%	64%	66%	69%	43%	45%	47%	49%
South West	58%	60%	61%	65%	45%	46%	47%	50%
South East	64%	67%	69%	69%	48%	50%	49%	49%
North East	57%	58%	57%	61%	41%	41%	42%	43%
Past 12 months								
East Midlands	62%	65%	64%	64%	42%	45%	44%	46%
Yorkshire	60%	63%	66%	67%	45%	47%	49%	50%
London	80%	81%	82%	82%	62%	64%	63%	62%
North West	57%	60%	61%	62%	42%	43%	44%	45%
East of England	61%	62%	66%	68%	47%	47%	49%	50%
West Midlands	62%	65%	67%	70%	44%	46%	47%	50%
South West	60%	60%	63%	66%	47%	47%	49%	51%
South East	64%	67%	69%	70%	48%	50%	49%	50%
North East	62%	57%	58%	61%	45%	41%	44%	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.