

England Occupancy Survey - June 2015

SUMMARY OF RESULTS

- Room occupancy in June increased by 2% (to 78%), with bedspace occupancy up +1% to 56%.
- Weekday occupancy saw a +1% change for room occupancy, at 80%, and remained flat for bedspace occupancy (0% change, remaining at 54%). Looking at weekend, both room and bedspace occupancy increased by +2% to 72% and 59% respectively.
- Seaside occupancy in June was up +6% to 74%, with bedspace occupancy up +4% to 55%. Countryside locations also saw increases, with room up +4% to 71% and bedspace up +2% to 55%. Small towns saw increases of +2% for both room and bedspace occupancy (rising to 74% and 52%), with city/large towns flat (+1% to 84% for room and 0% to 59% for bed).
- Looking at occupancy by establishment type, B&B's saw occupancy increase by +5% for room and +3% for bed. Hotels occupancy increased by +2% for room and +1% for bed, with guest house occupancy flat (-1% for room and +1% for bedspace).
- Looking at occupancy rates by number of rooms, there were increases across all room categories, apart from the 26-30 room category which remained flat for room and down -2% for bed. The 1-3 room category saw the biggest uplift in room occupancy compared to June 2014 (+4%) with the 11-25 room category seeing the biggest uplift for bedspace (+3% to 56%).
- Looking at occupancy by region, the East of England and the West Midlands saw the biggest increases in room occupancy (+6% each respectively), followed by the South West and the East Midlands (+4% each respectively). The East Midlands saw the biggest increase in bedspace occupancy (+6%) followed by the West Midlands (+4%) and Yorkshire (+4%). London and the North West were the only areas to remain flat.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
June	76%	78%	+2%	55%	56%	+1%
Jan-June	66%	66%	+1%	48%	49%	+1%
Past 12 months	68%	70%	+2%	51%	52%	+1%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
June	70%	73%	+3%	54%	55%	+1%
Jan-June	58%	59%	+1%	43%	44%	+1%
Past 12 months	62%	63%	+1%	48%	47%	-1%

Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
June								
Weekday	74%	79%	79%	80%	53%	53%	54%	54%
Weekend	70%	71%	70%	72%	59%	57%	57%	59%
Jan-June								
Weekday	65%	66%	68%	70%	44%	45%	47%	47%
Weekend	60%	61%	62%	62%	49%	50%	50%	51%
Past 12 months								
Weekday	68%	68%	71%	72%	47%	47%	49%	49%
Weekend	64%	64%	65%	67%	53%	53%	53%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
June								
Seaside	68%	69%	68%	74%	56%	59%	51%	55%
City/large town	77%	83%	83%	84%	59%	60%	59%	59%
Small town	70%	72%	72%	74%	51%	51%	50%	52%
Countryside	67%	69%	67%	71%	55%	54%	53%	55%
Jan-June								
Seaside	51%	54%	55%	56%	40%	43%	40%	43%
City/large town	70%	73%	75%	75%	53%	54%	55%	54%
Small town	59%	61%	61%	63%	41%	42%	43%	44%
Countryside	52%	55%	54%	56%	40%	42%	41%	42%
Past 12 months								
Seaside	56%	58%	60%	62%	46%	47%	45%	48%
City/large town	72%	74%	77%	78%	55%	56%	57%	57%
Small town	61%	63%	65%	66%	44%	44%	46%	46%
Countryside	56%	57%	59%	60%	44%	45%	46%	46%

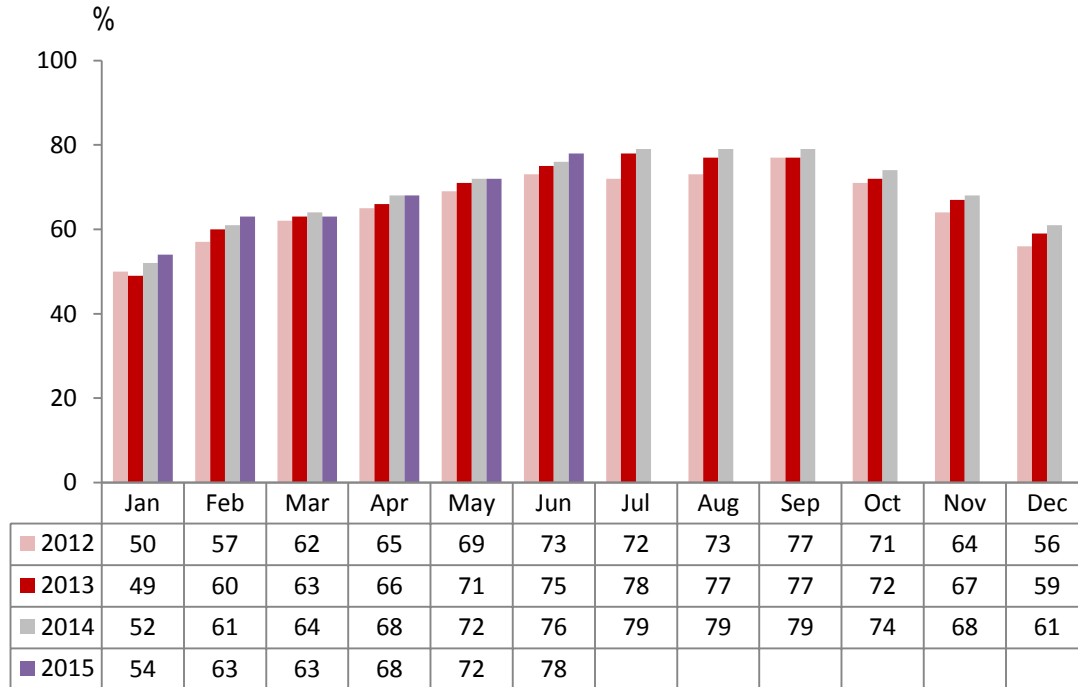
Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
June								
Hotel	75%	78%	79%	81%	58%	58%	56%	57%
Guesthouse	65%	64%	63%	62%	55%	51%	50%	51%
B&B	59%	60%	61%	66%	49%	48%	50%	53%
Jan-June								
Hotel	66%	68%	69%	70%	49%	51%	51%	51%
Guesthouse	48%	48%	50%	50%	37%	38%	38%	39%
B&B	44%	44%	45%	49%	34%	33%	35%	38%
Past 12 months								
Hotel	69%	70%	72%	73%	52%	52%	53%	53%
Guesthouse	53%	54%	55%	55%	42%	43%	43%	43%
B&B	48%	49%	49%	52%	37%	37%	39%	42%

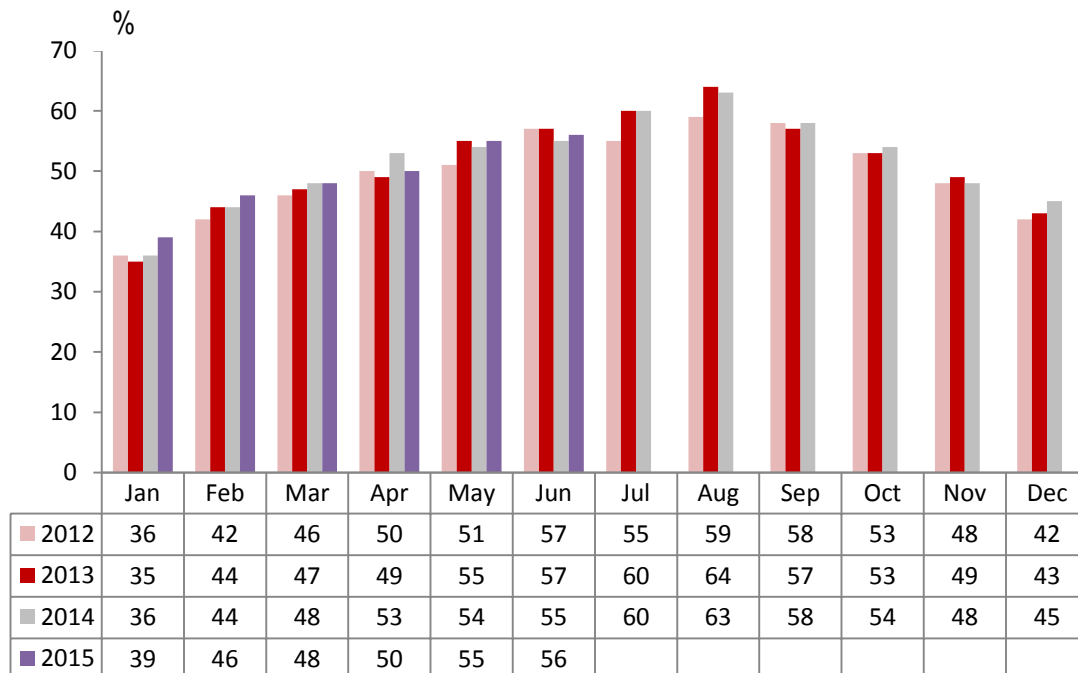
Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
June								
1-3 rooms	52%	54%	54%	58%	45%	45%	45%	46%
4-10 rooms	60%	61%	60%	62%	49%	49%	48%	49%
11-25 rooms	64%	67%	69%	71%	52%	51%	53%	56%
26-30 rooms	74%	76%	75%	75%	60%	59%	61%	59%
51-100 rooms	77%	75%	76%	79%	62%	59%	56%	57%
100+ rooms	78%	82%	82%	84%	57%	57%	56%	58%
Jan-June								
1-3 rooms	36%	37%	37%	41%	29%	29%	30%	31%
4-10 rooms	43%	44%	44%	47%	33%	34%	34%	36%
11-25 rooms	52%	52%	57%	57%	38%	38%	42%	43%
26-30 rooms	61%	65%	65%	63%	46%	50%	50%	50%
51-100 rooms	77%	67%	63%	65%	52%	52%	49%	48%
100+ rooms	78%	73%	75%	76%	51%	52%	53%	53%
Past 12 months								
1-3 rooms	40%	41%	41%	45%	32%	33%	34%	35%
4-10 rooms	49%	49%	50%	53%	38%	38%	39%	42%
11-25 rooms	57%	56%	61%	61%	43%	43%	46%	47%
26-30 rooms	63%	67%	69%	68%	49%	52%	54%	53%
51-100 rooms	70%	70%	66%	68%	54%	55%	53%	51%
100+ rooms	74%	75%	77%	78%	53%	53%	54%	56%

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
June								
East Midlands	69%	70%	70%	74%	48%	48%	46%	52%
Yorkshire	68%	69%	71%	73%	53%	52%	51%	55%
London	82%	89%	87%	87%	65%	68%	66%	65%
North West	62%	66%	64%	63%	46%	47%	46%	45%
East of England	69%	69%	70%	76%	54%	52%	51%	54%
West Midlands	67%	70%	70%	76%	49%	49%	49%	53%
South West	71%	71%	73%	77%	59%	55%	56%	59%
South East	75%	78%	80%	82%	59%	60%	55%	56%
North East	72%	71%	68%	70%	55%	52%	49%	51%
Jan-June								
East Midlands	60%	62%	61%	61%	40%	43%	42%	44%
Yorkshire	56%	60%	63%	63%	41%	45%	46%	47%
London	78%	79%	79%	78%	60%	62%	61%	59%
North West	53%	56%	57%	58%	38%	40%	41%	42%
East of England	58%	58%	62%	64%	44%	43%	46%	46%
West Midlands	60%	63%	65%	68%	42%	44%	46%	48%
South West	56%	57%	58%	62%	43%	43%	44%	47%
South East	62%	64%	64%	67%	46%	47%	46%	48%
North East	55%	56%	55%	59%	39%	40%	40%	42%
Past 12 months								
East Midlands	62%	64%	64%	64%	42%	44%	44%	46%
Yorkshire	60%	62%	65%	67%	45%	47%	49%	50%
London	81%	81%	82%	82%	63%	63%	64%	62%
North West	57%	60%	61%	62%	42%	43%	44%	45%
East of England	61%	61%	65%	68%	48%	47%	49%	50%
West Midlands	62%	64%	66%	70%	44%	46%	47%	50%
South West	61%	60%	62%	66%	47%	47%	48%	51%
South East	63%	67%	69%	70%	48%	49%	49%	50%
North East	63%	57%	58%	61%	46%	41%	42%	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.