

# England Occupancy Survey

September 2012 Results

# Note: Change in Occupancy Reporting

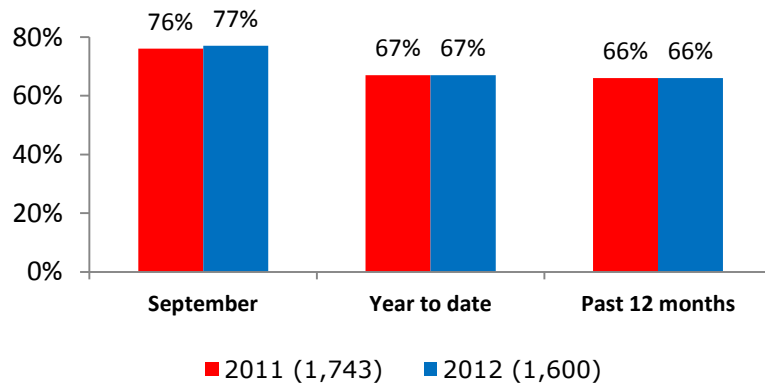
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas, business travellers vs. non business travellers).
- At present this data is only included in the single month analysis (September) and for the 2011 year to date data, but not for past 12 month or year-to-date for previous years as we only have STR data available from June 2010.
- 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.

# England Occupancy Reporting September 2012 (including data from STR Global)

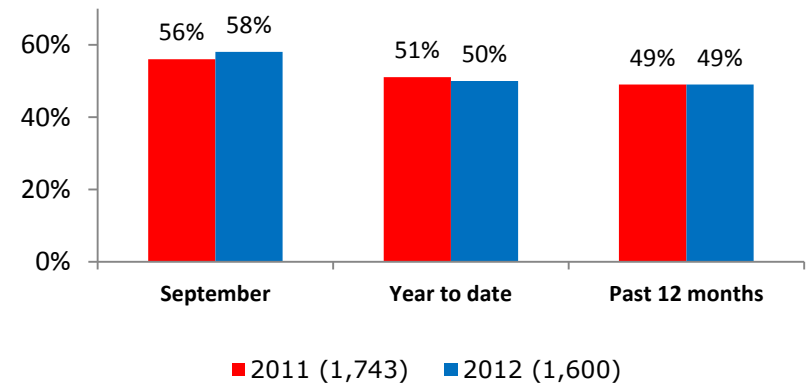
## Monthly Update : September 2012

This update shows that in September both room and bed occupancy levels were above the level achieved in September 2011, room occupancy rising by 1 percentage point and bedspace by 2 percentage points when compared to the previous year. Room and bed occupancy levels for the past 12 months remained consistent with the previous year.

### Room Occupancy



### Bedspace Occupancy

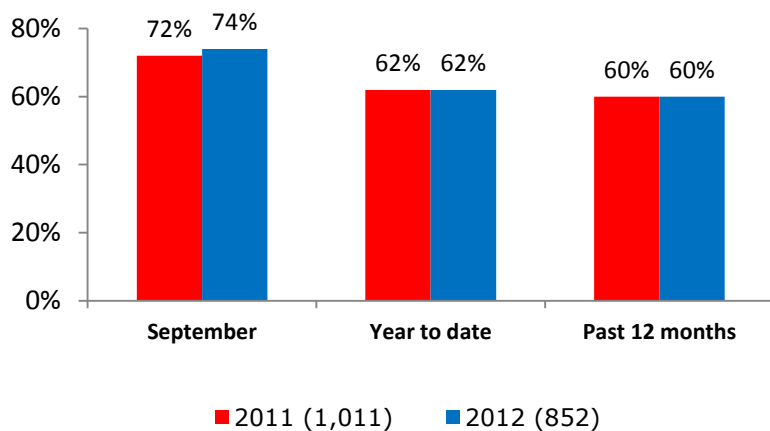


# England Occupancy Reporting September 2012 (excluding data from STR Global)

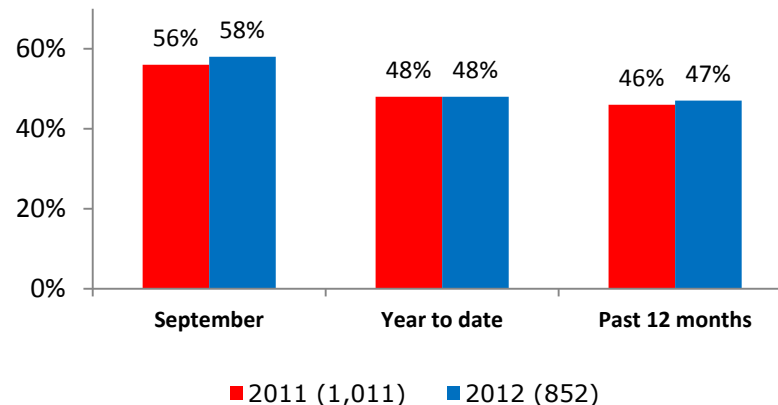
## Monthly Update : September 2012

This update shows that in September 2012 both room and bed occupancy increased by 2 percentage points each when compared with 2011. Room and bed occupancy levels for the year to date average and past 12 months remained on the whole static, with just bedspace occupancy in the past 12 months increasing slightly compared with the same period last year.

### Room Occupancy



### Bedspace Occupancy

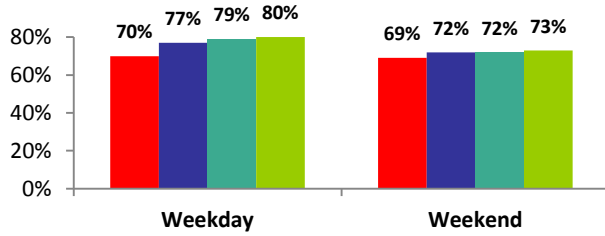


# England Occupancy Reporting September 2012

- Across England as a whole, both room and bedspace occupancy witnessed a slight increase compared with the levels achieved in September 2011
- Weekday room and bed occupancy levels during September 2012 were slightly above the September 2011 levels. Weekend room occupancy had increased by 1 percentage point with bedspace occupancy 2 percentage points above the levels achieved in the same month the previous year.
- Hotel room and bed occupancy in September 2012 had increased on the same period last year, with room occupancy in B&B's also seeing a slight increase. Guesthouse occupancy levels witnessed a small fall in both measures of occupancy when compared with September 2011.
- Across all location types, room occupancy had witnessed an increase in occupancy levels compared with September 2011, from 3 percentage points in seaside locations to 1 percentage point in the countryside. Bed occupancy levels in city/large town and countryside locations also increased by 3 percentage points respectively and 2 percentage points for small towns with seaside locations remaining static with the levels achieved during the same period last year.
- With the exception of 4-10 and 100+ sized establishments who had seen a small decrease, room occupancy levels in the remaining size bands had increased compared with September 2011 percentages. Bed occupancy levels increased in all but one of the size bands (4-10) with significant increases of 7 percentage points in the 26-50 room size band and 5 percentage points in the 51-100 room size band.

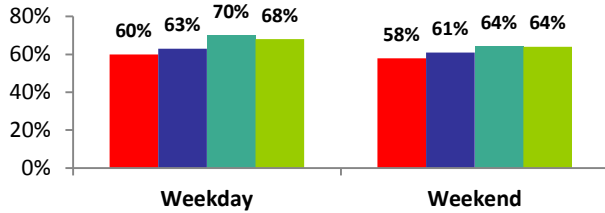
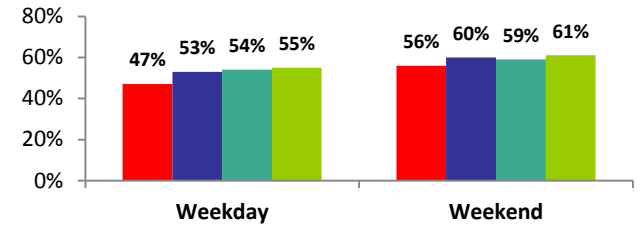
# Weekday / Weekend

## Room Occupancy

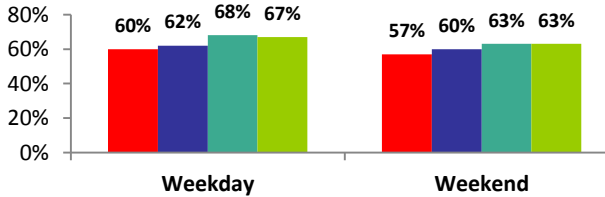
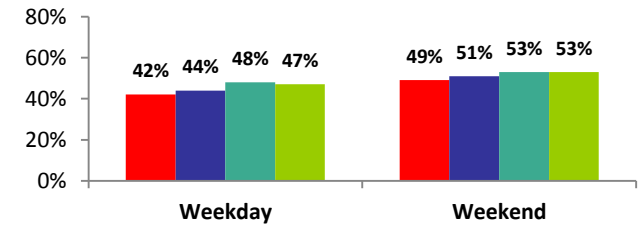


September 2012

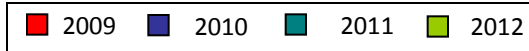
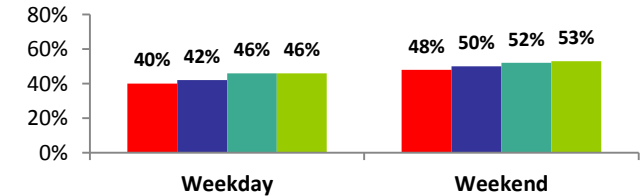
## Bedspace Occupancy



Year to Date  
(Jan 12 - Sept 12)

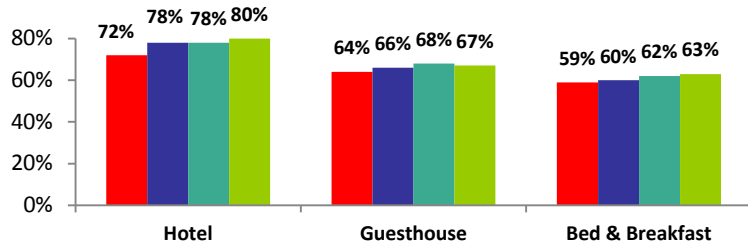


Past 12 Mths  
(Oct 11 - Sept 12)



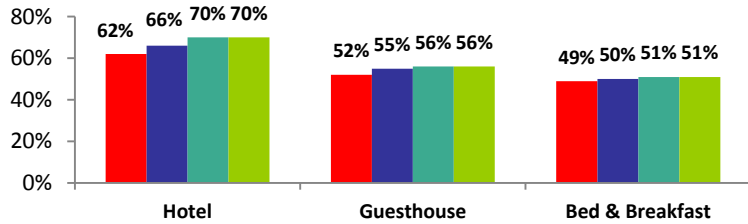
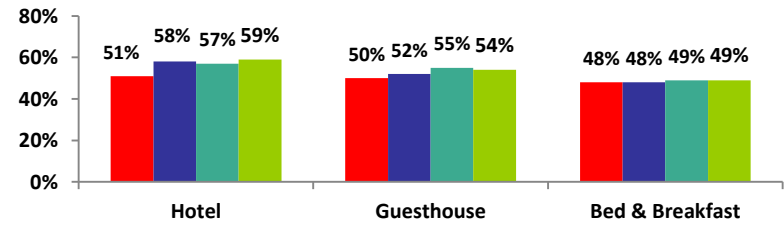
# Establishment Type

## Room Occupancy

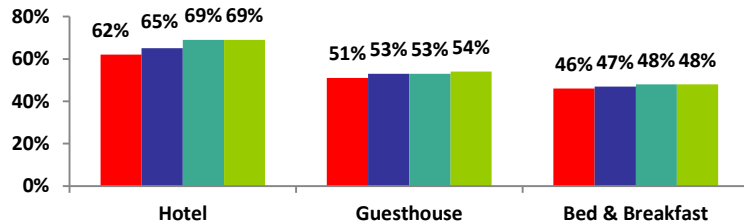
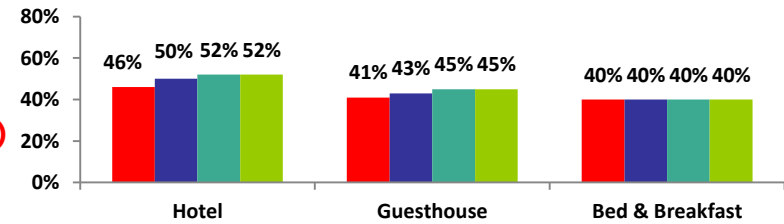


September  
2012

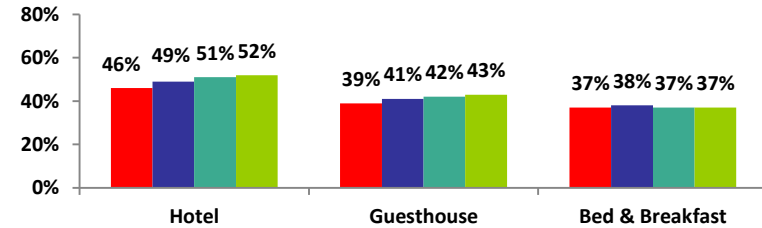
## Bedspace Occupancy



Year to Date  
(Jan 12 - Sept 12)



Past 12 Mths  
(Oct 11 - Sept 12)

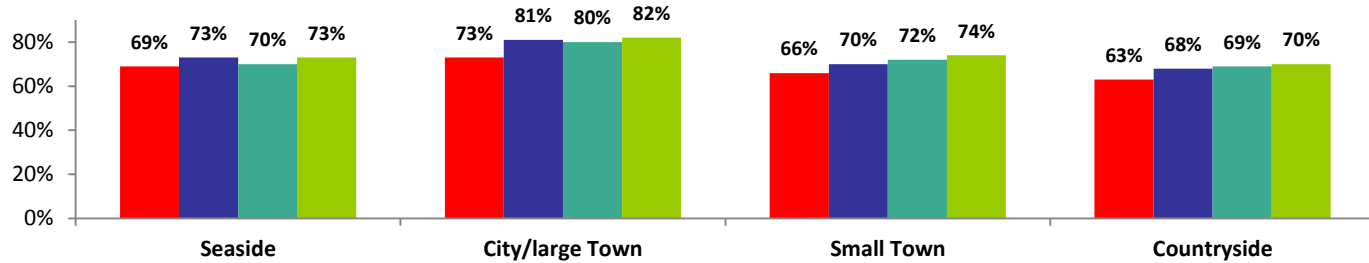


■ 2009 ■ 2010 ■ 2011 ■ 2012

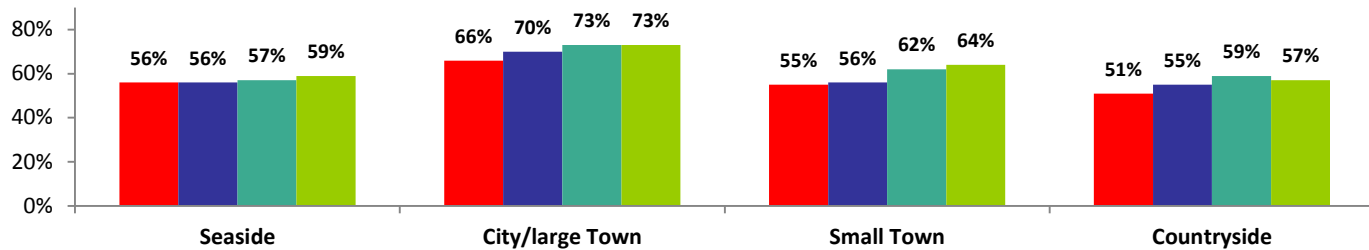
# Location

## Room Occupancy

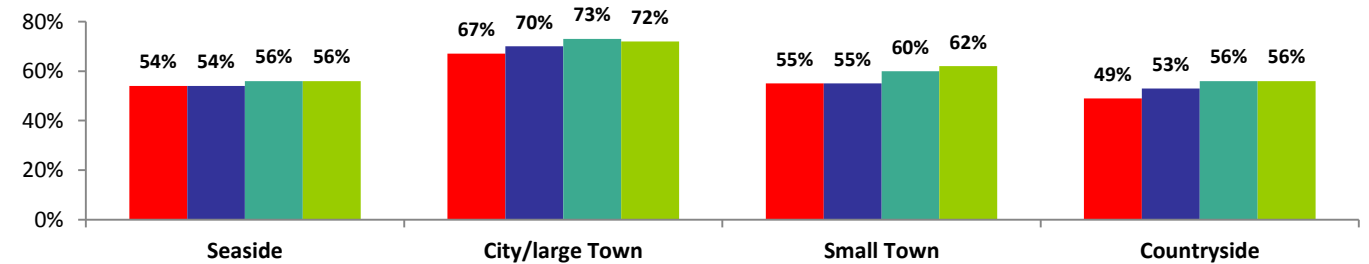
**September  
2012**



**Year to Date  
(Jan 12 -Sept 12)**



**Past 12 months  
(Oct 11-Sept 12)**



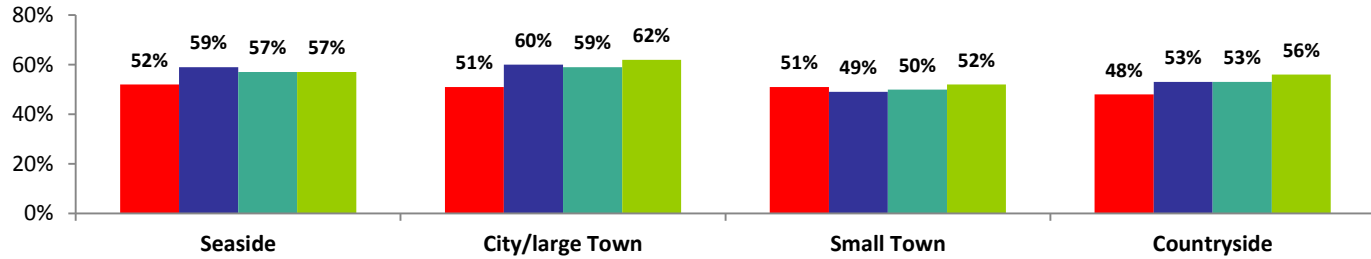
STR data is included in the year to date for 2011 and 2012 and the past 12 months for May-December 2011 data and 2012 data



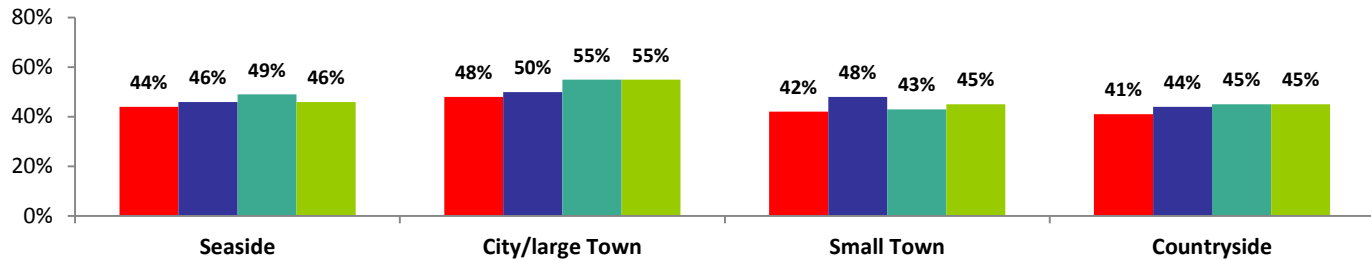
# Location

## Bedspace Occupancy

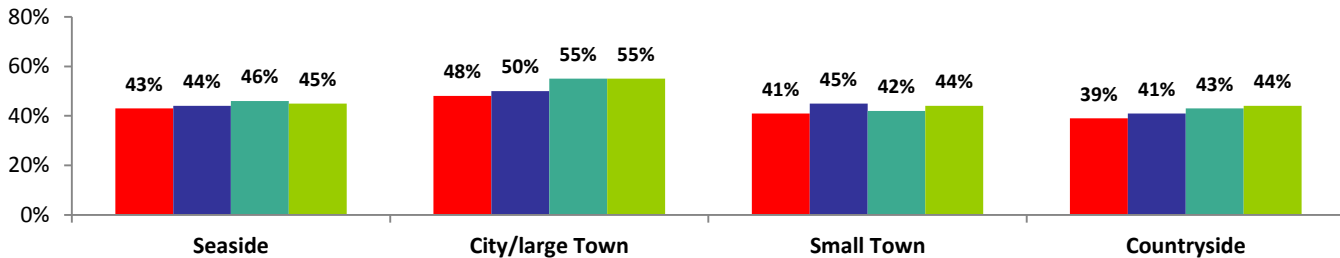
**September  
2012**



**Year to Date  
(Jan 12 -Sept 12)**



**Past 12 months  
(Oct 11 -Sept 12)**

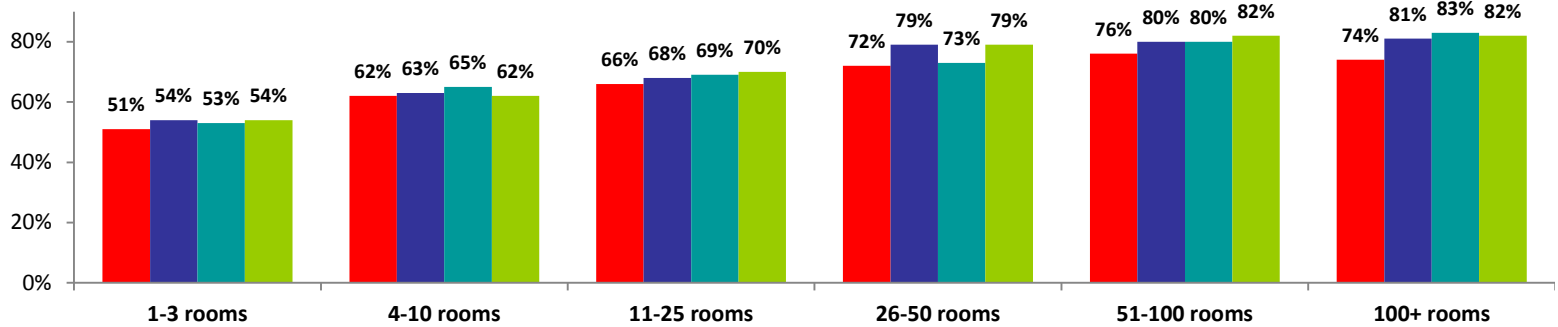


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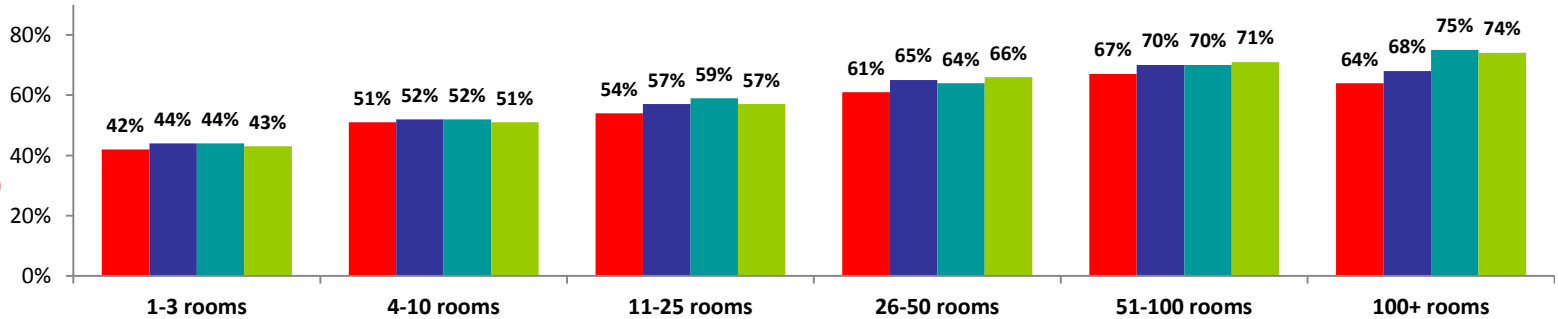
# Number of Rooms

## Room Occupancy

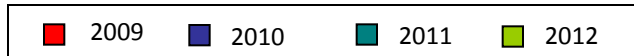
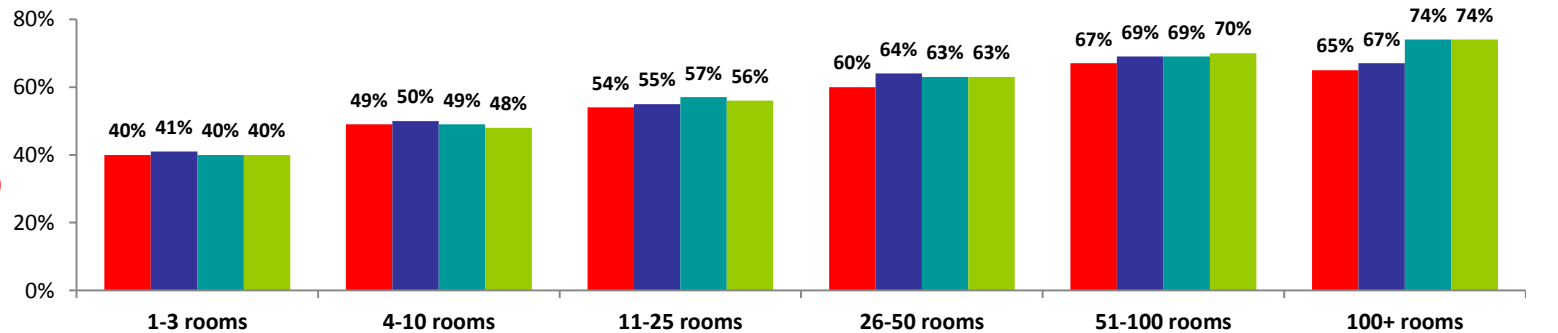
**September  
2012**



**Year to Date  
(Jan 12 -Sept 12)**



**Past 12 Mths  
(Oct 11 -Sept 12)**

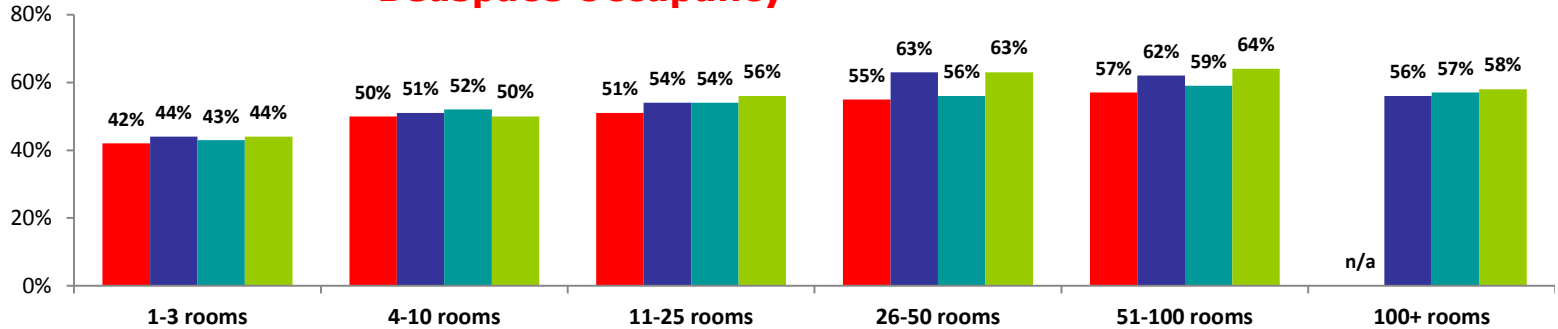


STR data is included in the year to date for 2011 and 2012 and the past 12 months for May-December 2011 data and 2012 data

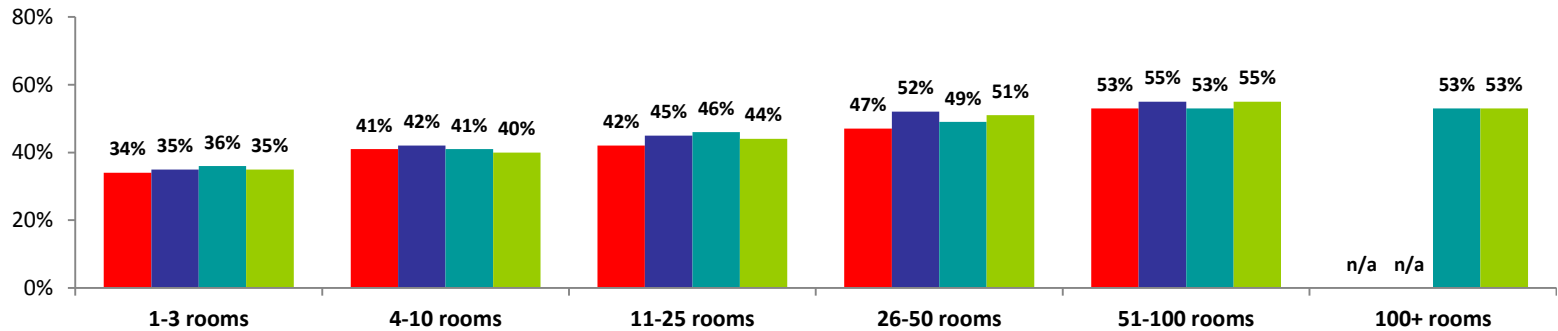
# Number of Rooms

## Bedspace Occupancy

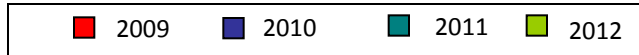
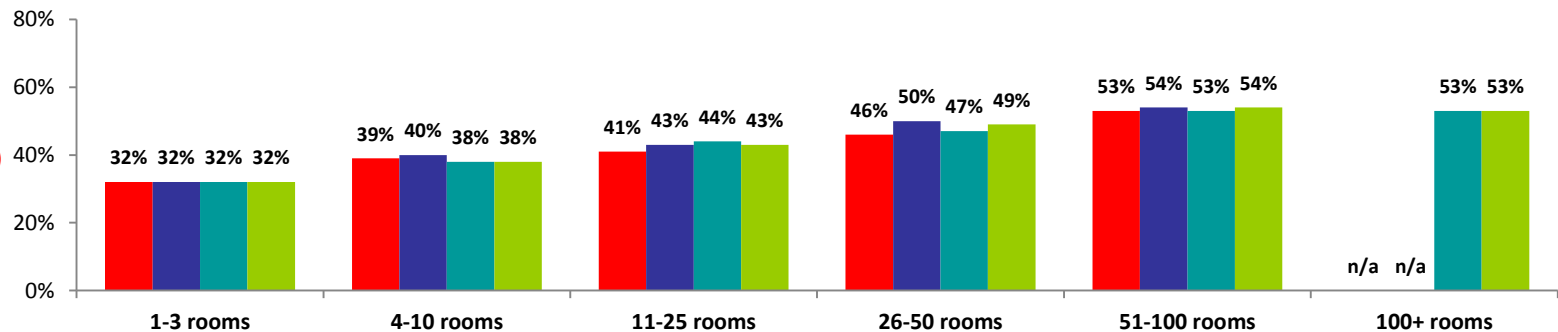
September  
2012



Year to Date  
(Jan 12-Sept 12)



Past 12 Mths  
(Oct 11-Sept 12)



STR data is included in the year to date for 2011 and 2012 and the past 12 months for May-December 2011 data and 2012 data