

## England Occupancy Survey - November 2013

### SUMMARY OF RESULTS

- Room occupancy in November increased by 3% compared with the same period in 2012, rising to 67%, with bedspace occupancy remaining broadly flat (+1%). Positively, both room and bedspace occupancy rates are up slightly for the year to date (by +2%).
- Both weekday and weekend room occupancy in November have increased against last year's figure (up 4% to 70% for weekday and up 3% to 64% for weekend occupancy). For bedspace, weekday occupancy remained flat (up 1% to 45%), with a slight increase in weekend occupancy (up 2% to 52%).
- City/large town locations saw the biggest uplift in room occupancy in November (up 6% to 79%), with bedspace occupancy remaining flat (-1% to 57%). Seaside locations saw an uplift in both room and bedspace occupancy (up 4% and 3% respectively). Small towns also saw increases in both room and bedspace occupancy (up 3% and 2% respectively), whereas occupancy in countryside locations (room and bed) remained flat, at +1% and 0% respectively.
- There is very little change in occupancy levels by establishment type for the month of November. However, looking at year to date, hotels are the only category to see an increase against the same period last year (up 3% for both room and bed).
- When looking at occupancy figures for November by number of rooms, almost all have witnessed increases compared with November last year. The 11-25 room category saw the greatest increases, at +4% for room and +5 for bedspace occupancy. The 51-100 room category was the only category to see a decline (-2% for room and -13% for bedspace).
- There was some variability by region, with the East of England and the West Midlands seeing the largest increases in room occupancy when compared to November last year (up 7% and 5% respectively). The East of England and the South East saw the greatest increases in bedspace occupancy (up 4%), with London the only region to remain flat (0% change, remaining at 63%).

#### Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
<b>November</b>	<b>64%</b>	<b>67%</b>	<b>+3%</b>	<b>48%</b>	<b>49%</b>	<b>+1%</b>
Jan-Nov	67%	69%	+2%	50%	52%	+2%
Past 12 months	66%	68%	+2%	50%	51%	+1%

#### Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
<b>November</b>	<b>57%</b>	<b>59%</b>	<b>+2%</b>	<b>44%</b>	<b>42%</b>	<b>-2%</b>
Jan-Nov	62%	64%	+2%	48%	50%	+2%
Past 12 months	61%	63%	+2%	47%	49%	+2%

Please note that STR 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.

## Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>November</b>								
Weekday	64%	66%	66%	70%	41%	44%	44%	45%
Weekend	57%	60%	61%	64%	47%	51%	50%	52%
<b>Jan-Nov</b>								
Weekday	63%	70%	68%	71%	43%	48%	47%	49%
Weekend	60%	64%	64%	66%	51%	53%	53%	55%
<b>Past 12 months</b>								
Weekday	61%	68%	67%	70%	42%	47%	46%	48%
Weekend	59%	63%	63%	65%	50%	52%	52%	54%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>November</b>								
Seaside	46%	49%	51%	55%	33%	37%	39%	42%
City/large town	74%	72%	73%	79%	55%	54%	58%	57%
Small town	56%	56%	61%	64%	36%	40%	41%	43%
Countryside	42%	53%	50%	51%	30%	39%	37%	37%
<b>Jan-Nov</b>								
Seaside	55%	57%	58%	61%	45%	48%	46%	51%
City/large town	70%	74%	73%	78%	51%	55%	56%	58%
Small town	56%	62%	64%	66%	46%	43%	45%	46%
Countryside	54%	59%	56%	61%	43%	45%	45%	47%
<b>Past 12 months</b>								
Seaside	54%	56%	57%	60%	44%	46%	45%	50%
City/large town	70%	73%	72%	77%	50%	55%	55%	57%
Small town	55%	60%	62%	65%	45%	42%	44%	45%
Countryside	53%	57%	55%	59%	42%	44%	44%	46%

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## Establishment Type

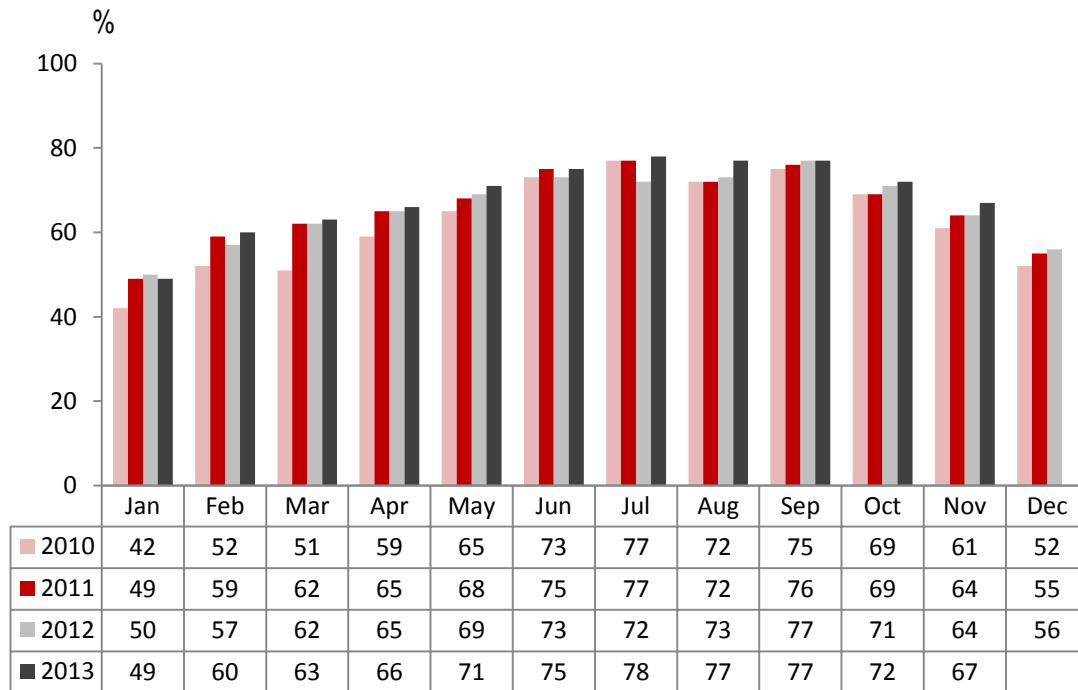
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>November</b>								
Hotel	58%	68%	69%	71%	42%	50%	52%	52%
Guesthouse	42%	43%	46%	47%	29%	31%	34%	34%
B&B	37%	39%	39%	39%	25%	27%	28%	27%
<b>Jan-Nov</b>								
Hotel	69%	70%	70%	73%	52%	52%	52%	55%
Guesthouse	54%	55%	55%	55%	42%	44%	44%	43%
B&B	49%	50%	50%	50%	39%	39%	39%	39%
<b>Past 12 months</b>								
Hotel	68%	69%	69%	72%	51%	51%	52%	54%
Guesthouse	53%	54%	54%	54%	41%	43%	43%	43%
B&B	47%	48%	48%	49%	38%	37%	37%	38%

## Number of rooms

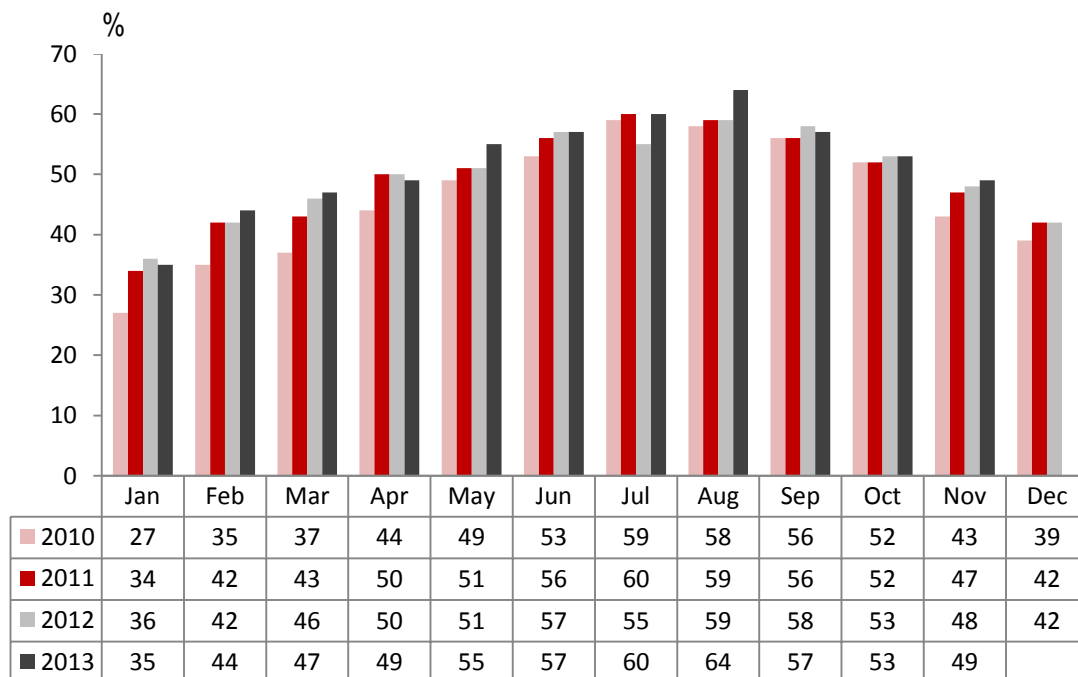
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>November</b>								
1-3 rooms	29%	30%	29%	33%	20%	21%	22%	24%
4-10 rooms	36%	38%	37%	41%	26%	27%	27%	30%
11-25 rooms	51%	52%	53%	57%	35%	37%	36%	41%
26-50 rooms	58%	56%	64%	66%	39%	44%	48%	48%
51-100 rooms	65%	69%	68%	66%	50%	54%	60%	47%
100+ rooms	75%	76%	75%	78%	52%	52%	53%	54%
<b>Jan-Nov</b>								
1-3 rooms	42%	43%	41%	43%	33%	34%	34%	35%
4-10 rooms	51%	51%	49%	51%	41%	40%	39%	40%
11-25 rooms	57%	58%	57%	59%	44%	45%	44%	45%
26-50 rooms	65%	63%	66%	70%	51%	49%	51%	55%
51-100 rooms	70%	70%	71%	70%	55%	53%	56%	55%
100+ rooms	72%	75%	75%	77%	n/a	53%	53%	55%
<b>Past 12 months</b>								
1-3 rooms	41%	41%	40%	41%	32%	32%	32%	33%
4-10 rooms	50%	49%	48%	50%	40%	39%	38%	39%
11-25 rooms	56%	57%	56%	58%	44%	44%	43%	44%
26-50 rooms	64%	62%	64%	69%	50%	47%	50%	54%
51-100 rooms	69%	69%	70%	69%	54%	53%	55%	54%
100+ rooms	71%	74%	74%	76%	n/a	53%	53%	54%

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## England Room Occupancy by Month



## England Bedspace Occupancy by Month



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## Regional Information

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>November</b>								
East Midlands	54%	59%	64%	65%	35%	38%	41%	44%
Yorkshire	56%	58%	60%	64%	40%	42%	44%	47%
London	85%	84%	83%	83%	64%	64%	63%	63%
North West	55%	58%	60%	63%	37%	40%	42%	45%
East of England	58%	57%	60%	67%	41%	44%	44%	48%
West Midlands	63%	65%	65%	70%	42%	44%	45%	48%
South West	50%	54%	53%	55%	35%	39%	40%	41%
South East	58%	58%	61%	65%	40%	41%	42%	46%
North East	48%	63%	49%	53%	29%	42%	35%	36%
<b>Jan-Nov</b>								
East Midlands	57%	63%	64%	66%	39%	42%	44%	45%
Yorkshire	57%	62%	61%	65%	42%	45%	46%	49%
London	79%	83%	81%	82%	62%	65%	62%	64%
North West	59%	57%	58%	61%	44%	41%	43%	44%
East of England	58%	62%	62%	64%	47%	48%	48%	48%
West Midlands	59%	64%	64%	66%	47%	46%	45%	47%
South West	59%	63%	61%	63%	47%	49%	48%	49%
South East	57%	64%	67%	70%	47%	48%	49%	52%
North East	53%	66%	58%	60%	37%	48%	42%	43%
<b>Past 12 months</b>								
East Midlands	56%	62%	63%	65%	39%	41%	43%	45%
Yorkshire	56%	60%	60%	64%	42%	44%	45%	48%
London	79%	83%	80%	82%	62%	64%	62%	64%
North West	59%	56%	58%	61%	43%	41%	42%	44%
East of England	58%	61%	61%	63%	46%	47%	47%	48%
West Midlands	58%	63%	63%	65%	46%	45%	45%	46%
South West	58%	61%	60%	62%	46%	47%	47%	48%
South East	56%	63%	65%	68%	46%	47%	48%	51%
North East	52%	66%	56%	58%	37%	47%	41%	41%

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## 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.

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