

England Occupancy Survey - October 2013

SUMMARY OF RESULTS

- Both room and bedspace occupancy (including STR Global data) remained broadly flat in October compared with the same period in 2012, at 72% for room and 53% for bedspace. Nevertheless, both room and bedspace occupancy rates are up for the year to date (by 2% and 3% respectively).
- Weekday room occupancy in October increased against last year's figure (up 3% to 74%), with weekend occupancy flat, at 69%. For bedspace, weekday occupancy remained flat (up 1% to 50%) with weekend occupancy also flat, at 57%.
- City/large town locations saw the biggest uplift in room occupancy in October (up 5% to 83%), with bedspace remaining flat (up 1% to 60%). Countryside locations also saw an uplift in room occupancy in October (up 3% to 63%). Both room and bed occupancy in seaside locations fell by 2%.
- There is very little change in occupancy levels by establishment type for the month of October. 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 October by number of rooms, there is some variability when compared with last year. However, the 11-25 room category saw the greatest increases, at +3% for both room and bedspace occupancy. The 51-100 room category saw the biggest declines (-4% for room and -5% for bedspace).
- There was also some variability by region, with the East of England, Yorkshire and the North East seeing the largest increases in room occupancy when compared to October last year (up 6%, 5% and 5% respectively). These regions also saw the greatest uplift in bedspace occupancy.

Room and Bedspace Occupancy (including STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
October	71%	72%	+1%	53%	53%	0%
Jan-Sep	67%	69%	+2%	50%	53%	+3%
Past 12 months	66%	68%	+2%	49%	51%	+2%

Room and Bedspace Occupancy (excluding STR Global data)

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
October	65%	66%	+1%	50%	50%	0%
Jan-Sep	62%	64%	+2%	48%	51%	+3%
Past 12 months	61%	62%	+1%	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
October								
Weekday	71%	70%	71%	74%	49%	49%	49%	50%
Weekend	66%	66%	69%	69%	56%	56%	57%	57%
Jan-Oct								
Weekday	63%	70%	68%	71%	44%	48%	47%	49%
Weekend	61%	65%	64%	66%	51%	53%	53%	55%
Past 12 months								
Weekday	62%	68%	67%	70%	42%	46%	46%	48%
Weekend	59%	63%	63%	65%	50%	52%	53%	54%

Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
October								
Seaside	56%	54%	61%	59%	45%	45%	48%	46%
City/large town	79%	76%	78%	83%	60%	59%	59%	60%
Small town	65%	65%	68%	69%	46%	46%	47%	47%
Countryside	59%	62%	60%	63%	47%	47%	46%	47%
Jan-Oct								
Seaside	56%	58%	59%	62%	46%	48%	47%	52%
City/large town	71%	74%	73%	77%	51%	56%	55%	58%
Small town	57%	62%	64%	66%	48%	43%	45%	47%
Countryside	55%	59%	57%	61%	44%	46%	45%	48%
Past 12 months								
Seaside	54%	56%	57%	60%	43%	46%	45%	50%
City/large town	70%	73%	72%	76%	50%	55%	55%	57%
Small town	55%	60%	62%	65%	45%	42%	44%	45%
Countryside	53%	56%	56%	59%	42%	43%	44%	46%

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Establishment Type

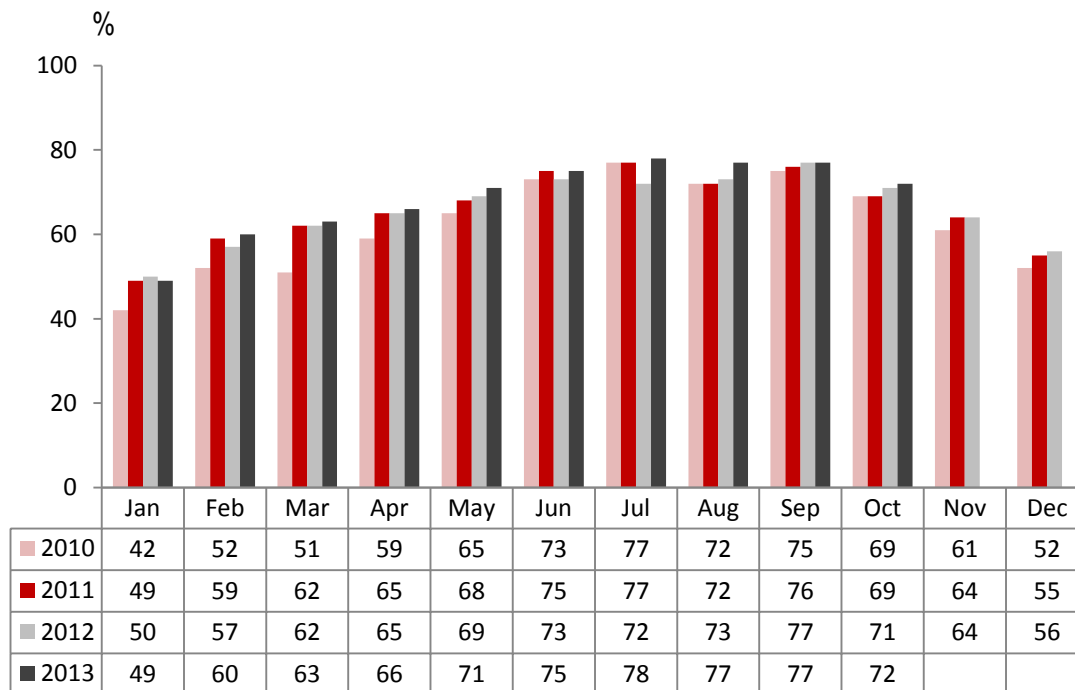
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
October								
Hotel	73%	72%	75%	76%	55%	54%	55%	56%
Guesthouse	56%	56%	56%	56%	43%	45%	44%	43%
B&B	49%	50%	51%	50%	38%	39%	38%	38%
Jan-Oct								
Hotel	66%	70%	70%	73%	51%	52%	52%	55%
Guesthouse	55%	56%	56%	56%	43%	45%	45%	44%
B&B	50%	51%	51%	51%	40%	40%	40%	40%
Past 12 months								
Hotel	65%	69%	69%	71%	49%	51%	52%	54%
Guesthouse	53%	53%	53%	54%	41%	42%	42%	43%
B&B	47%	48%	48%	49%	38%	36%	37%	38%

Number of rooms

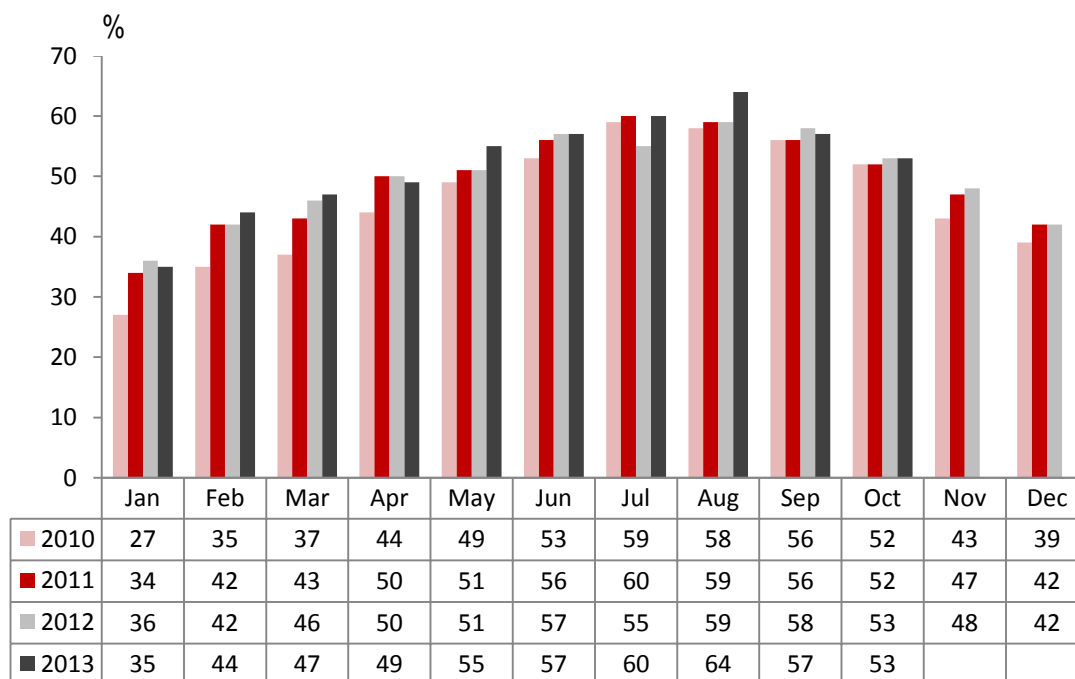
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
October								
1-3 rooms	43%	41%	42%	40%	34%	33%	33%	32%
4-10 rooms	52%	53%	49%	51%	42%	42%	38%	40%
11-25 rooms	61%	60%	61%	64%	48%	47%	46%	49%
26-50 rooms	69%	66%	72%	72%	53%	53%	56%	57%
51-100 rooms	72%	69%	75%	71%	58%	53%	58%	53%
100+ rooms	79%	78%	80%	81%	56%	56%	56%	56%
Jan-Oct								
1-3 rooms	44%	44%	42%	43%	35%	35%	35%	36%
4-10 rooms	52%	52%	50%	52%	42%	41%	40%	41%
11-25 rooms	57%	59%	57%	60%	45%	46%	44%	45%
26-50 rooms	66%	64%	66%	70%	52%	49%	52%	55%
51-100 rooms	70%	70%	71%	70%	55%	53%	55%	56%
100+ rooms	68%	75%	75%	77%	n/a	53%	53%	55%
Past 12 months								
1-3 rooms	41%	40%	40%	41%	32%	32%	32%	33%
4-10 rooms	50%	49%	48%	50%	40%	38%	38%	39%
11-25 rooms	56%	57%	56%	58%	44%	44%	43%	44%
26-50 rooms	64%	63%	64%	69%	50%	47%	50%	54%
51-100 rooms	69%	69%	70%	69%	54%	52%	54%	55%
100+ rooms	67%	74%	74%	76%	n/a	53%	52%	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
October								
East Midlands	62%	67%	69%	66%	43%	44%	46%	43%
Yorkshire	63%	63%	64%	69%	48%	47%	47%	50%
London	90%	86%	88%	88%	70%	67%	68%	68%
North West	65%	65%	66%	67%	49%	48%	49%	49%
East of England	62%	63%	65%	71%	47%	50%	49%	51%
West Midlands	68%	68%	70%	71%	49%	49%	49%	49%
South West	63%	62%	60%	64%	49%	48%	46%	47%
South East	63%	61%	71%	71%	45%	46%	51%	50%
North East	62%	72%	56%	61%	44%	51%	39%	44%
Jan-Oct								
East Midlands	58%	64%	64%	66%	40%	42%	44%	46%
Yorkshire	57%	62%	61%	65%	43%	45%	46%	49%
London	79%	83%	80%	82%	62%	65%	62%	65%
North West	58%	57%	58%	61%	43%	41%	43%	44%
East of England	59%	63%	62%	64%	48%	49%	48%	49%
West Midlands	59%	64%	64%	66%	48%	46%	46%	47%
South West	60%	64%	62%	64%	48%	50%	49%	50%
South East	58%	65%	67%	70%	48%	49%	50%	53%
North East	54%	67%	59%	60%	39%	48%	42%	43%
Past 12 months								
East Midlands	56%	62%	63%	65%	39%	41%	43%	44%
Yorkshire	56%	60%	60%	64%	42%	44%	45%	48%
London	79%	83%	80%	82%	61%	64%	62%	64%
North West	58%	56%	57%	61%	42%	40%	42%	44%
East of England	58%	61%	61%	63%	46%	47%	47%	48%
West Midlands	57%	63%	63%	65%	46%	45%	45%	46%
South West	58%	61%	60%	61%	46%	47%	47%	48%
South East	55%	63%	65%	68%	46%	47%	48%	51%
North East	54%	65%	58%	58%	38%	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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