

## England Occupancy Survey - September 2013

### SUMMARY OF RESULTS

- Both room and bedspace occupancy (including STR Global data) remained flat in September compared with the same period in 2012 (at 77% for room and 57% 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 September remained flat against last year's September figure (80%), with weekend occupancy also flat (72%). For bedspace, weekday occupancy remained flat (54%) with weekend occupancy dropping slightly (by 2%), down to 59%.
- There were few differences by destination type when compared with the same month last year, with everything remaining broadly flat, apart from seaside which saw a small decrease for room occupancy (-2%). City/large towns also saw a slight decline (-2% for bedspace occupancy).
- Room and bedspace occupancy remained flat for hotels, with guest houses seeing a decrease on both measures when compared with September last year (-2% and -4% respectively). B&B's remained flat for bedspace occupancy and fell slightly, by 2%, for room occupancy.
- When looking at occupancy figures for September by number of rooms, there is little variability in occupancy rates when compared with last year. However, the 51-100 room category saw the greatest declines, at -7% for both room and bedspace occupancy.
- Most of the regions remained flat for both room and bedspace occupancy, however, Yorkshire saw the biggest uplift in both room and bedspace occupancy (+3% and +1%), with the East Midlands seeing the biggest declines (by -4% and -5%).

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

	Room Occupancy			Bedspace Occupancy		
	2012	2013	% +/-	2012	2013	% +/-
September	77%	77%	0%	58%	57%	-1%
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	% +/-
September	74%	73%	-1%	58%	57%	-1%
Jan-Sep	62%	64%	+2%	48%	51%	+3%
Past 12 months	60%	62%	+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>September</b>								
Weekday	77%	79%	80%	80%	53%	54%	55%	54%
Weekend	72%	72%	73%	72%	60%	59%	61%	59%
<b>Jan-Sep</b>								
Weekday	63%	70%	68%	71%	44%	48%	47%	49%
Weekend	61%	64%	64%	66%	51%	53%	53%	55%
<b>Past 12 months</b>								
Weekday	62%	68%	67%	69%	42%	46%	46%	48%
Weekend	60%	63%	63%	65%	50%	52%	53%	54%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>September</b>								
Seaside	73%	70%	73%	71%	59%	57%	57%	59%
City/large town	81%	80%	82%	83%	60%	59%	62%	60%
Small town	70%	72%	74%	74%	49%	50%	52%	51%
Countryside	68%	69%	70%	71%	53%	53%	56%	56%
<b>Jan-Sep</b>								
Seaside	56%	57%	59%	62%	46%	49%	46%	52%
City/large town	70%	73%	73%	77%	50%	55%	55%	58%
Small town	56%	62%	64%	66%	48%	43%	45%	47%
Countryside	55%	59%	57%	61%	44%	45%	45%	48%
<b>Past 12 months</b>								
Seaside	54%	56%	56%	60%	44%	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%	41%	43%	44%	46%

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## Establishment Type

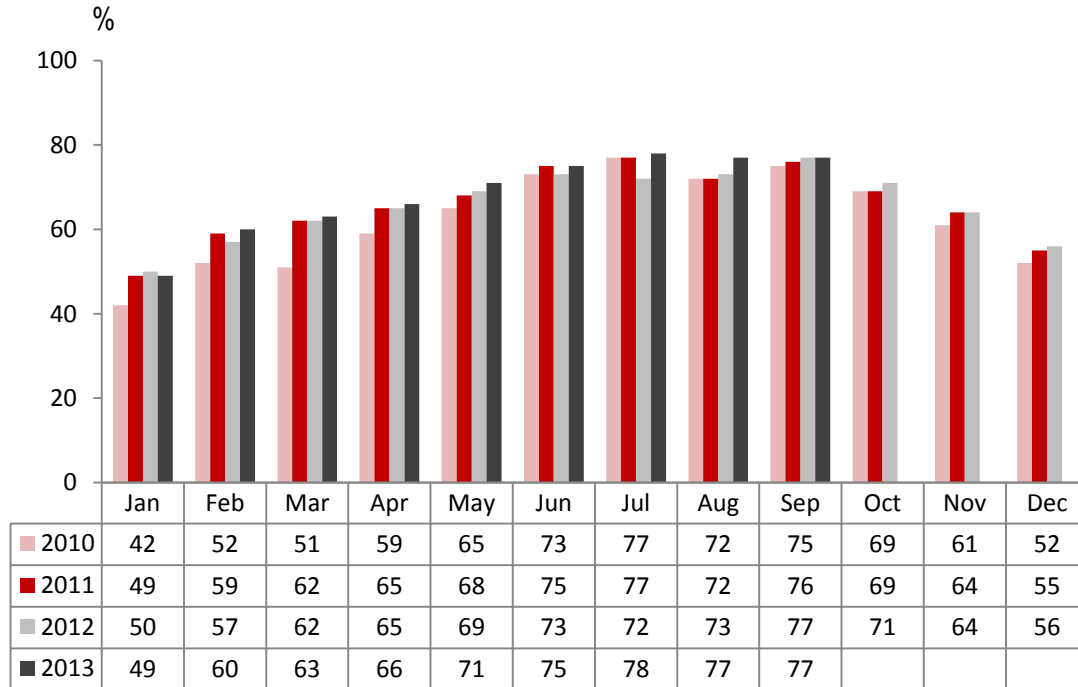
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>September</b>								
Hotel	78%	78%	80%	80%	58%	57%	59%	58%
Guesthouse	66%	68%	67%	65%	52%	55%	54%	50%
B&B	60%	62%	63%	61%	48%	49%	49%	49%
<b>Jan-Sep</b>								
Hotel	66%	70%	70%	72%	50%	52%	52%	55%
Guesthouse	55%	56%	56%	56%	43%	45%	45%	44%
B&B	50%	51%	51%	51%	40%	40%	40%	40%
<b>Past 12 months</b>								
Hotel	65%	69%	69%	71%	49%	51%	52%	54%
Guesthouse	53%	53%	54%	54%	41%	42%	43%	43%
B&B	47%	48%	48%	49%	38%	37%	37%	38%

## Number of rooms

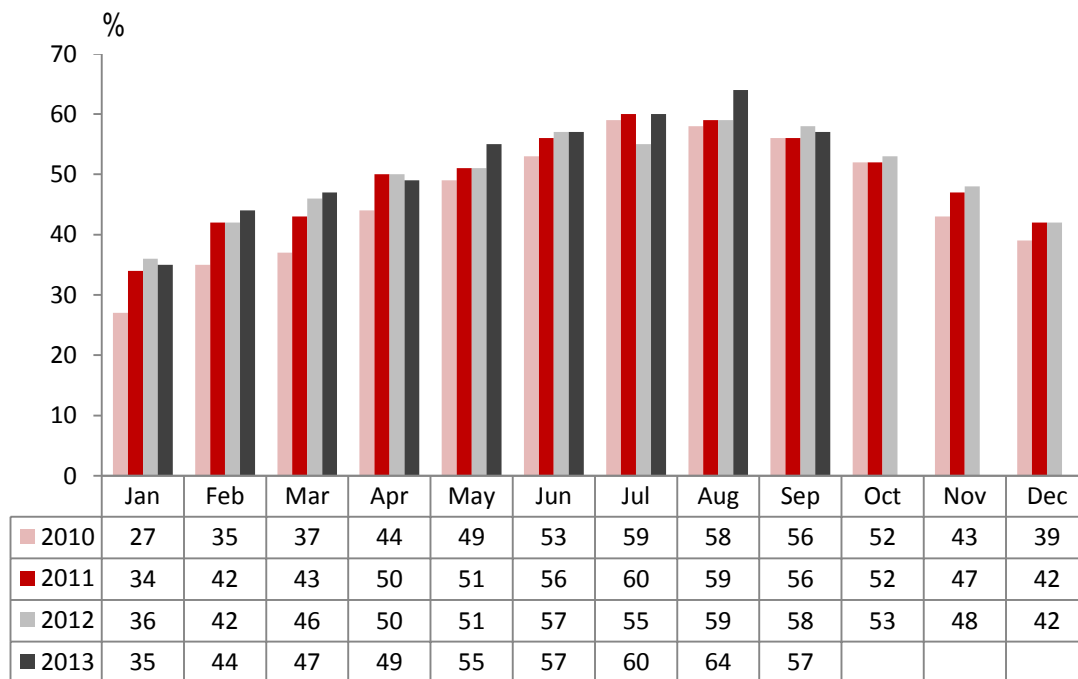
	Room Occupancy				Bedspace Occupancy			
	2010	2011	2012	2013	2010	2011	2012	2013
<b>September</b>								
1-3 rooms	54%	53%	54%	53%	44%	43%	44%	45%
4-10 rooms	63%	65%	62%	63%	51%	52%	50%	50%
11-25 rooms	68%	69%	70%	70%	54%	54%	56%	53%
26-30 rooms	79%	73%	79%	79%	63%	56%	63%	63%
51-100 rooms	80%	80%	82%	75%	62%	59%	64%	57%
100+ rooms	81%	83%	82%	83%	56%	57%	58%	57%
<b>Jan-Sep</b>								
1-3 rooms	44%	44%	43%	44%	35%	36%	35%	36%
4-10 rooms	52%	52%	51%	52%	42%	41%	40%	41%
11-25 rooms	57%	59%	57%	59%	45%	46%	44%	45%
26-30 rooms	65%	64%	66%	70%	52%	49%	51%	55%
51-100 rooms	70%	70%	71%	70%	55%	53%	55%	56%
100+ rooms	68%	75%	74%	76%	n/a	53%	53%	54%
<b>Past 12 months</b>								
1-3 rooms	41%	40%	40%	41%	32%	32%	32%	33%
4-10 rooms	50%	49%	48%	49%	40%	38%	38%	39%
11-25 rooms	55%	57%	56%	58%	43%	44%	43%	43%
26-30 rooms	64%	63%	63%	69%	50%	47%	49%	54%
51-100 rooms	69%	69%	70%	70%	54%	53%	54%	55%
100+ rooms	67%	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>September</b>								
East Midlands	69%	70%	75%	71%	48%	45%	52%	47%
Yorkshire	68%	71%	71%	74%	51%	53%	53%	54%
London	89%	88%	88%	88%	67%	67%	68%	67%
North West	71%	66%	68%	67%	54%	48%	50%	49%
East of England	71%	74%	72%	72%	53%	56%	55%	54%
West Midlands	70%	73%	74%	73%	49%	52%	53%	51%
South West	74%	75%	75%	75%	58%	58%	59%	58%
South East	76%	75%	79%	79%	53%	55%	57%	58%
North East	69%	78%	66%	67%	48%	55%	48%	48%
<b>Jan-Sep</b>								
East Midlands	58%	63%	64%	66%	40%	42%	44%	46%
Yorkshire	57%	62%	61%	65%	42%	45%	46%	49%
London	78%	83%	80%	82%	61%	65%	62%	64%
North West	59%	56%	57%	61%	44%	41%	42%	44%
East of England	58%	63%	62%	63%	48%	49%	48%	48%
West Midlands	59%	64%	63%	66%	48%	46%	45%	47%
South West	60%	64%	62%	64%	48%	50%	49%	50%
South East	58%	64%	67%	70%	49%	49%	50%	53%
North East	54%	66%	59%	60%	39%	47%	43%	43%
<b>Past 12 months</b>								
East Midlands	56%	61%	63%	65%	39%	41%	43%	45%
Yorkshire	56%	60%	60%	63%	42%	44%	45%	43%
London	79%	83%	80%	82%	61%	65%	62%	64%
North West	60%	56%	57%	63%	44%	40%	42%	60%
East of England	58%	61%	61%	62%	46%	47%	47%	47%
West Midlands	57%	63%	63%	65%	45%	45%	45%	46%
South West	58%	61%	60%	61%	45%	47%	47%	48%
South East	56%	64%	64%	68%	46%	47%	48%	51%
North East	55%	64%	60%	57%	39%	45%	43%	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 VisitEngland.

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