

## England Occupancy Survey - October 2014

### SUMMARY OF RESULTS

- Room occupancy in October showed an increase of +2%, rising to 74%, with bedspace occupancy up +1% to 54%. Looking at the year to date, room occupancy is up +1%, with bedspace flat (0%).
- Weekday occupancy in October was up for both room and bedspace occupancy (+2% and +1%), with weekend occupancy up +2% for room and flat (0%) for bedspace.
- Seaside occupancy was up +5% for room and +6% for bedspace, with occupancy levels in small towns up +2% for both measures of occupancy. City/large towns remained flat for both measures, with countryside down -1% for both room and bedspace occupancy.
- Looking at occupancy by establishment type, B&B's saw increases of +4% for room and +5% for bedspace occupancy, with guesthouses up +2% for both measures. Hotel occupancy is up +1% for room and flat (0%) for bed.
- Looking at number of rooms, occupancy levels were up across all size bands, apart from the 51-100 room category for room occupancy (down -3%), and the 25-50 room category for bedspace occupancy (down -2%). The 1-3 and 4-10 size bands saw the biggest uplift on both measures.
- The East Midlands saw the biggest increases in occupancy in October for both room and bedspace (+6% and +5% respectively), followed by the West Midlands, the South East and the South West. The only areas to see slight declines were London (down -2%) and the North East (down -1%).

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

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
<b>October</b>	72%	74%	+2%	53%	54%	+1%
Jan-Oct	69%	70%	+1%	53%	53%	0%
Past 12 months	68%	69%	+1%	51%	51%	0%

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

	Room Occupancy			Bedspace Occupancy		
	2013	2014	% +/-	2013	2014	% +/-
<b>October</b>	66%	67%	+1%	50%	50%	0%
Jan-Oct	64%	64%	0%	51%	49%	-2%
Past 12 months	62%	62%	0%	49%	47%	-2%

## Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>October</b>								
Weekday	70%	71%	74%	76%	49%	49%	50%	51%
Weekend	66%	69%	69%	71%	56%	57%	57%	57%
<b>Jan-Oct</b>								
Weekday	70%	68%	71%	72%	48%	47%	49%	50%
Weekend	65%	64%	66%	67%	53%	53%	55%	54%
<b>Past 12 months</b>								
Weekday	68%	67%	70%	71%	46%	46%	48%	49%
Weekend	63%	63%	65%	66%	52%	53%	54%	54%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>October</b>								
Seaside	54%	61%	59%	64%	45%	48%	46%	52%
City/large town	76%	78%	83%	83%	59%	59%	60%	60%
Small town	65%	68%	69%	71%	46%	47%	47%	49%
Countryside	62%	60%	63%	62%	47%	46%	47%	46%
<b>Jan-Oct</b>								
Seaside	58%	59%	62%	63%	48%	47%	52%	49%
City/large town	74%	73%	77%	78%	56%	55%	58%	58%
Small town	62%	64%	66%	66%	43%	45%	47%	47%
Countryside	59%	57%	61%	60%	46%	45%	48%	47%
<b>Past 12 months</b>								
Seaside	56%	57%	60%	61%	46%	45%	50%	47%
City/large town	73%	72%	76%	78%	55%	55%	57%	57%
Small town	60%	62%	65%	65%	42%	44%	45%	46%
Countryside	56%	56%	59%	58%	43%	44%	46%	45%

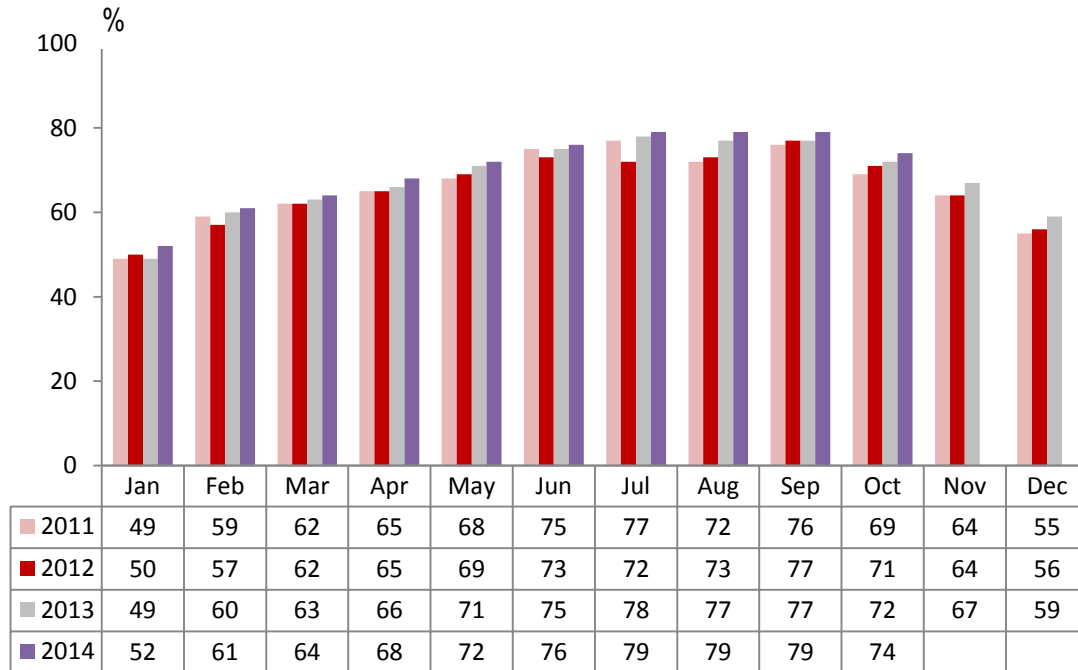
## Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>October</b>								
Hotel	72%	75%	76%	77%	54%	55%	56%	56%
Guesthouse	56%	56%	56%	58%	45%	44%	43%	45%
B&B	50%	51%	50%	54%	39%	38%	38%	43%
<b>Jan-Oct</b>								
Hotel	70%	70%	73%	74%	52%	52%	55%	54%
Guesthouse	56%	56%	56%	57%	45%	45%	44%	44%
B&B	51%	51%	51%	53%	40%	40%	40%	42%
<b>Past 12 months</b>								
Hotel	69%	69%	71%	72%	51%	52%	54%	54%
Guesthouse	53%	53%	54%	55%	42%	42%	43%	43%
B&B	48%	48%	49%	50%	36%	37%	38%	40%

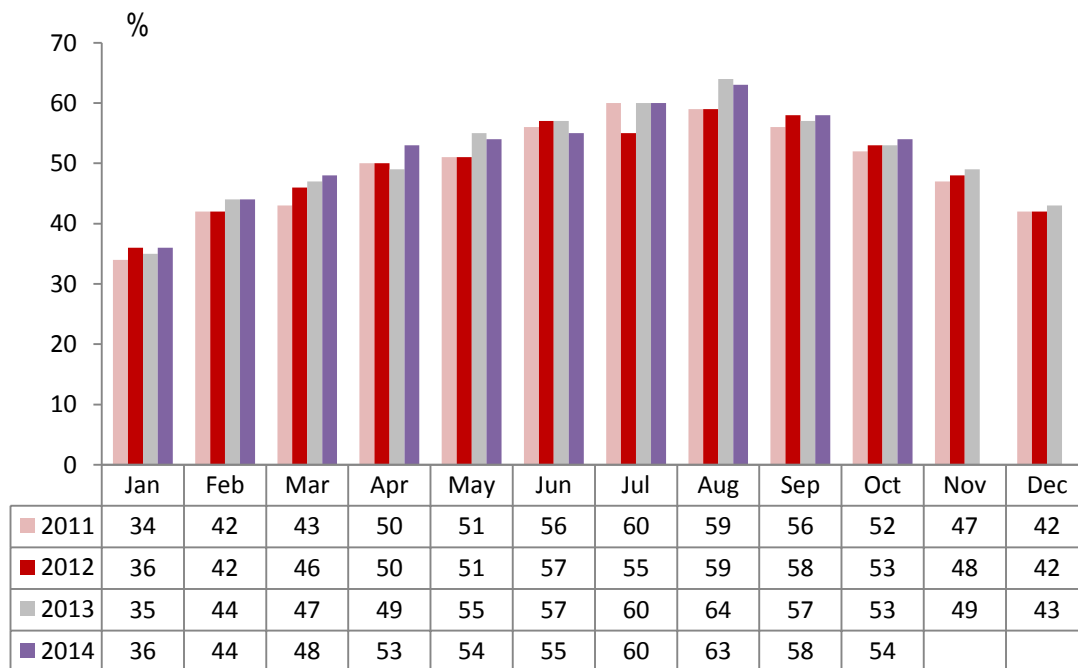
## Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>October</b>								
1-3 rooms	41%	42%	40%	44%	33%	33%	32%	35%
4-10 rooms	53%	49%	51%	55%	42%	38%	40%	43%
11-25 rooms	60%	61%	64%	65%	47%	46%	49%	50%
26-50 rooms	66%	72%	72%	75%	53%	56%	57%	55%
51-100 rooms	69%	75%	71%	68%	53%	58%	53%	56%
100+ rooms	78%	80%	81%	82%	56%	56%	56%	58%
<b>Jan-Oct</b>								
1-3 rooms	44%	42%	43%	45%	35%	35%	36%	37%
4-10 rooms	52%	50%	52%	53%	41%	40%	41%	42%
11-25 rooms	59%	57%	60%	62%	46%	44%	45%	47%
26-50 rooms	64%	66%	70%	70%	49%	52%	55%	54%
51-100 rooms	70%	71%	70%	67%	53%	55%	56%	54%
100+ rooms	75%	75%	77%	78%	53%	53%	55%	56%
<b>Past 12 months</b>								
1-3 rooms	40%	40%	41%	42%	32%	32%	33%	35%
4-10 rooms	49%	48%	50%	51%	38%	38%	39%	40%
11-25 rooms	57%	56%	58%	61%	44%	43%	44%	46%
26-50 rooms	63%	64%	69%	69%	47%	50%	54%	53%
51-100 rooms	69%	70%	69%	65%	52%	54%	55%	53%
100+ rooms	74%	74%	76%	77%	53%	52%	54%	55%

## England Room Occupancy by Month



## England Bedspace Occupancy by Month



## Regional Information

	Room Occupancy				Bedspace Occupancy			
	2011	2012	2013	2014	2011	2012	2013	2014
<b>October</b>								
East Midlands	67%	69%	66%	72%	44%	46%	43%	48%
Yorkshire	63%	64%	69%	69%	47%	47%	50%	51%
London	86%	88%	88%	88%	67%	68%	68%	66%
North West	65%	66%	67%	68%	48%	49%	49%	49%
East of England	63%	65%	71%	71%	50%	49%	51%	51%
West Midlands	68%	70%	71%	75%	49%	49%	49%	53%
South West	62%	60%	64%	67%	48%	46%	47%	50%
South East	61%	71%	71%	74%	46%	51%	50%	54%
North East	72%	56%	61%	63%	51%	39%	44%	43%
<b>Jan-Oct</b>								
East Midlands	64%	64%	66%	65%	42%	44%	46%	46%
Yorkshire	62%	61%	65%	68%	45%	46%	49%	50%
London	83%	80%	82%	82%	65%	62%	65%	63%
North West	57%	58%	61%	61%	41%	43%	44%	45%
East of England	63%	62%	64%	67%	49%	48%	49%	50%
West Midlands	64%	64%	66%	69%	46%	46%	47%	49%
South West	64%	62%	64%	66%	50%	49%	50%	51%
South East	65%	67%	70%	72%	49%	50%	53%	52%
North East	67%	59%	60%	60%	48%	42%	43%	43%
<b>Past 12 months</b>								
East Midlands	62%	63%	65%	65%	41%	43%	44%	45%
Yorkshire	60%	60%	64%	66%	44%	45%	48%	49%
London	83%	80%	82%	82%	64%	62%	64%	63%
North West	56%	57%	61%	61%	40%	42%	44%	44%
East of England	61%	61%	63%	66%	47%	47%	48%	50%
West Midlands	63%	63%	65%	68%	45%	45%	46%	48%
South West	61%	60%	61%	64%	47%	47%	48%	49%
South East	63%	65%	68%	69%	47%	48%	51%	50%
North East	65%	58%	58%	58%	47%	41%	41%	41%

## 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.