

## England Occupancy Survey - September 2014

### SUMMARY OF RESULTS

- Room occupancy in September showed an increase of +2%, rising to 79%, with bedspace occupancy up +1% to 58%. Looking at the year to date, room occupancy is up +1%, with bedspace down -1%.
- Weekday occupancy in September was flat for both room and bedspace occupancy (0%) with weekend occupancy up +4% for room and +2% for bedspace.
- Looking at room occupancy by location type, each location type saw increases in September, particularly seaside and cities/large towns (+2% each respectively), whilst countryside saw a slight decline (-1%). For bedspace, seaside occupancy dropped by -3%, countryside remained flat (0%) and large towns/cities and small towns increased slightly (+1% and +2%).
- Looking at occupancy by establishment type, hotels and B&B's saw increases for both room and bedspace occupancy, whilst guesthouses increased by +1% for room and remained flat for bedspace.
- When looking at occupancy figures for September by number of rooms, the 4-10 room category saw the biggest uplift for room occupancy (+3%), with all other categories seeing increases of +2, apart from the 26-30 category, which remained flat (0%). For bedspace, all room categories saw increases, apart from the 1-3 room category, which was flat (0%), and the 26-30 category which was down -2%.
- There were increases across almost all regions in September for both room and bedspace occupancy, with the East and West Midlands seeing the biggest increases on both measures (+6% and +10% for East and +6% and 4% for West). However, London, the South East and the North East are down slightly for bedspace (-2%, -1% and -2%).

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

|                  | Room Occupancy |      |            | Bedspace Occupancy |      |            |
|------------------|----------------|------|------------|--------------------|------|------------|
|                  | 2013           | 2014 | % +/-      | 2013               | 2014 | % +/-      |
| <b>September</b> | 77%            | 79%  | <b>+2%</b> | 57%                | 58%  | <b>+1%</b> |
| Jan-Sep          | 69%            | 70%  | <b>+1%</b> | 53%                | 52%  | <b>-1%</b> |
| Past 12 months   | 68%            | 69%  | <b>+1%</b> | 51%                | 51%  | <b>0%</b>  |

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

|                  | Room Occupancy |      |            | Bedspace Occupancy |      |            |
|------------------|----------------|------|------------|--------------------|------|------------|
|                  | 2013           | 2014 | % +/-      | 2013               | 2014 | % +/-      |
| <b>September</b> | 73%            | 73%  | <b>0%</b>  | 57%                | 57%  | <b>0%</b>  |
| Jan-Sep          | 64%            | 63%  | <b>-1%</b> | 51%                | 49%  | <b>-2%</b> |
| Past 12 months   | 62%            | 62%  | <b>0%</b>  | 49%                | 47%  | <b>-2%</b> |

## Weekday/Weekend

|                       | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|-----------------------|----------------|------|------|------|--------------------|------|------|------|
|                       | 2011           | 2012 | 2013 | 2014 | 2011               | 2012 | 2013 | 2014 |
| <b>September</b>      |                |      |      |      |                    |      |      |      |
| Weekday               | 79%            | 80%  | 80%  | 80%  | 54%                | 55%  | 54%  | 54%  |
| Weekend               | 72%            | 73%  | 72%  | 76%  | 59%                | 61%  | 59%  | 61%  |
| <b>Jan-Sep</b>        |                |      |      |      |                    |      |      |      |
| Weekday               | 70%            | 68%  | 71%  | 72%  | 48%                | 47%  | 49%  | 50%  |
| Weekend               | 64%            | 64%  | 66%  | 66%  | 53%                | 53%  | 55%  | 54%  |
| <b>Past 12 months</b> |                |      |      |      |                    |      |      |      |
| Weekday               | 68%            | 67%  | 69%  | 71%  | 46%                | 46%  | 48%  | 49%  |
| Weekend               | 63%            | 63%  | 65%  | 66%  | 52%                | 53%  | 54%  | 53%  |

## Location Type

|                       | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|-----------------------|----------------|------|------|------|--------------------|------|------|------|
|                       | 2011           | 2012 | 2013 | 2014 | 2011               | 2012 | 2013 | 2014 |
| <b>September</b>      |                |      |      |      |                    |      |      |      |
| Seaside               | 70%            | 73%  | 71%  | 73%  | 57%                | 57%  | 59%  | 56%  |
| City/large town       | 80%            | 82%  | 83%  | 85%  | 59%                | 62%  | 60%  | 61%  |
| Small town            | 72%            | 74%  | 74%  | 75%  | 50%                | 52%  | 51%  | 53%  |
| Countryside           | 69%            | 70%  | 71%  | 70%  | 53%                | 56%  | 56%  | 56%  |
| <b>Jan-Sep</b>        |                |      |      |      |                    |      |      |      |
| Seaside               | 57%            | 59%  | 62%  | 63%  | 49%                | 46%  | 52%  | 49%  |
| City/large town       | 73%            | 73%  | 77%  | 78%  | 55%                | 55%  | 58%  | 58%  |
| Small town            | 62%            | 64%  | 66%  | 65%  | 43%                | 45%  | 47%  | 47%  |
| Countryside           | 59%            | 57%  | 61%  | 60%  | 45%                | 45%  | 48%  | 47%  |
| <b>Past 12 months</b> |                |      |      |      |                    |      |      |      |
| Seaside               | 56%            | 56%  | 60%  | 60%  | 46%                | 45%  | 50%  | 46%  |
| 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%  | 59%  | 43%                | 44%  | 46%  | 45%  |

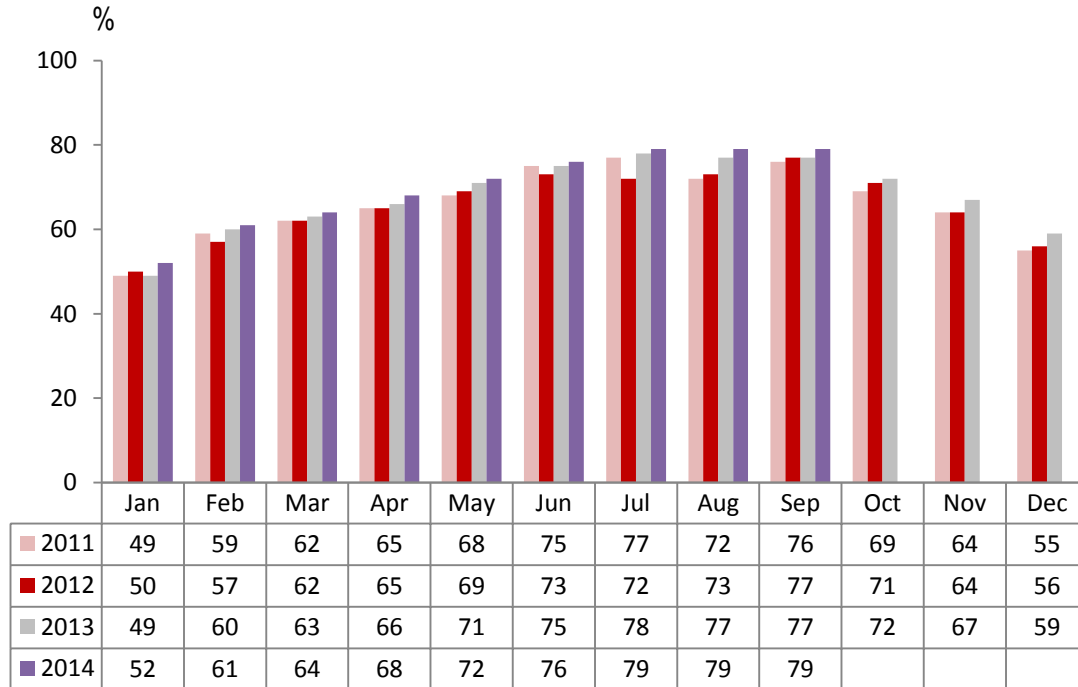
## Establishment Type

|                       | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|-----------------------|----------------|------|------|------|--------------------|------|------|------|
|                       | 2011           | 2012 | 2013 | 2014 | 2011               | 2012 | 2013 | 2014 |
| <b>September</b>      |                |      |      |      |                    |      |      |      |
| Hotel                 | 78%            | 80%  | 80%  | 82%  | 57%                | 59%  | 58%  | 59%  |
| Guesthouse            | 68%            | 67%  | 65%  | 66%  | 55%                | 54%  | 50%  | 50%  |
| B&B                   | 62%            | 63%  | 61%  | 64%  | 49%                | 49%  | 49%  | 51%  |
| <b>Jan-Sep</b>        |                |      |      |      |                    |      |      |      |
| Hotel                 | 70%            | 70%  | 72%  | 73%  | 52%                | 52%  | 55%  | 54%  |
| Guesthouse            | 56%            | 56%  | 56%  | 57%  | 45%                | 45%  | 44%  | 44%  |
| B&B                   | 51%            | 51%  | 51%  | 52%  | 40%                | 40%  | 40%  | 42%  |
| <b>Past 12 months</b> |                |      |      |      |                    |      |      |      |
| Hotel                 | 69%            | 69%  | 71%  | 72%  | 51%                | 52%  | 54%  | 53%  |
| Guesthouse            | 53%            | 54%  | 54%  | 55%  | 42%                | 43%  | 43%  | 42%  |
| B&B                   | 48%            | 48%  | 49%  | 50%  | 37%                | 37%  | 38%  | 39%  |

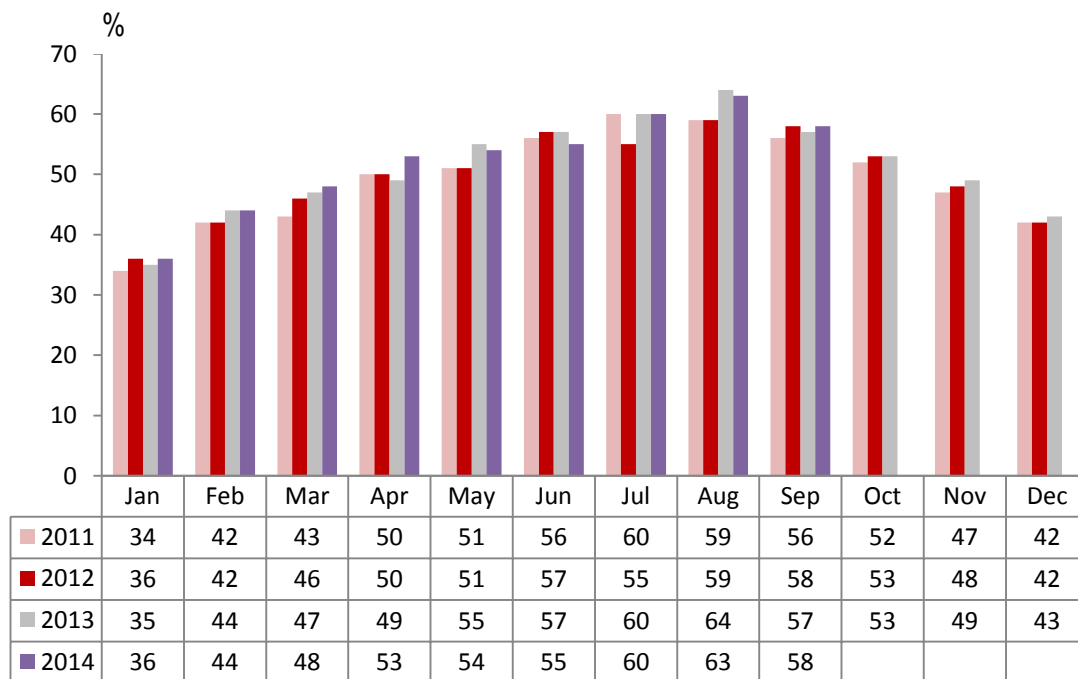
## Number of rooms

|                       | Room Occupancy |      |      |      | Bedspace Occupancy |      |      |      |
|-----------------------|----------------|------|------|------|--------------------|------|------|------|
|                       | 2011           | 2012 | 2013 | 2014 | 2011               | 2012 | 2013 | 2014 |
| <b>September</b>      |                |      |      |      |                    |      |      |      |
| 1-3 rooms             | 53%            | 54%  | 53%  | 55%  | 43%                | 44%  | 45%  | 45%  |
| 4-10 rooms            | 65%            | 62%  | 63%  | 66%  | 52%                | 50%  | 50%  | 52%  |
| 11-25 rooms           | 69%            | 70%  | 70%  | 72%  | 54%                | 56%  | 53%  | 55%  |
| 26-30 rooms           | 73%            | 79%  | 79%  | 79%  | 56%                | 63%  | 63%  | 61%  |
| 51-100 rooms          | 80%            | 82%  | 75%  | 77%  | 59%                | 64%  | 57%  | 58%  |
| 100+ rooms            | 83%            | 82%  | 83%  | 85%  | 57%                | 58%  | 57%  | 58%  |
| <b>Jan-Sep</b>        |                |      |      |      |                    |      |      |      |
| 1-3 rooms             | 44%            | 43%  | 44%  | 45%  | 36%                | 35%  | 36%  | 37%  |
| 4-10 rooms            | 52%            | 51%  | 52%  | 53%  | 41%                | 40%  | 41%  | 42%  |
| 11-25 rooms           | 59%            | 57%  | 59%  | 62%  | 46%                | 44%  | 45%  | 47%  |
| 26-30 rooms           | 64%            | 66%  | 70%  | 70%  | 49%                | 51%  | 55%  | 54%  |
| 51-100 rooms          | 70%            | 71%  | 70%  | 67%  | 53%                | 55%  | 56%  | 54%  |
| 100+ rooms            | 75%            | 74%  | 76%  | 78%  | 53%                | 53%  | 54%  | 55%  |
| <b>Past 12 months</b> |                |      |      |      |                    |      |      |      |
| 1-3 rooms             | 40%            | 40%  | 41%  | 42%  | 32%                | 32%  | 33%  | 34%  |
| 4-10 rooms            | 49%            | 48%  | 49%  | 51%  | 38%                | 38%  | 39%  | 40%  |
| 11-25 rooms           | 57%            | 56%  | 58%  | 61%  | 44%                | 43%  | 43%  | 46%  |
| 26-30 rooms           | 63%            | 63%  | 69%  | 69%  | 47%                | 49%  | 54%  | 53%  |
| 51-100 rooms          | 69%            | 70%  | 70%  | 65%  | 53%                | 54%  | 55%  | 53%  |
| 100+ rooms            | 74%            | 74%  | 76%  | 77%  | 53%                | 53%  | 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>September</b>      |                |      |      |      |                    |      |      |      |
| East Midlands         | 70%            | 75%  | 71%  | 77%  | 45%                | 52%  | 47%  | 57%  |
| Yorkshire             | 71%            | 71%  | 74%  | 76%  | 53%                | 53%  | 54%  | 55%  |
| London                | 88%            | 88%  | 88%  | 89%  | 67%                | 68%  | 67%  | 65%  |
| North West            | 66%            | 68%  | 67%  | 68%  | 48%                | 50%  | 49%  | 49%  |
| East of England       | 74%            | 72%  | 72%  | 75%  | 56%                | 55%  | 54%  | 56%  |
| West Midlands         | 73%            | 74%  | 73%  | 79%  | 52%                | 53%  | 51%  | 55%  |
| South West            | 75%            | 75%  | 75%  | 78%  | 58%                | 59%  | 58%  | 60%  |
| South East            | 75%            | 79%  | 79%  | 79%  | 55%                | 57%  | 58%  | 57%  |
| North East            | 78%            | 66%  | 67%  | 70%  | 55%                | 48%  | 48%  | 46%  |
| <b>Jan-Sep</b>        |                |      |      |      |                    |      |      |      |
| East Midlands         | 63%            | 64%  | 66%  | 65%  | 42%                | 44%  | 46%  | 46%  |
| Yorkshire             | 62%            | 61%  | 65%  | 67%  | 45%                | 46%  | 49%  | 50%  |
| London                | 83%            | 80%  | 82%  | 82%  | 65%                | 62%  | 64%  | 63%  |
| North West            | 56%            | 57%  | 61%  | 61%  | 41%                | 42%  | 44%  | 44%  |
| East of England       | 63%            | 62%  | 63%  | 67%  | 49%                | 48%  | 48%  | 50%  |
| West Midlands         | 64%            | 63%  | 66%  | 68%  | 46%                | 45%  | 47%  | 49%  |
| South West            | 64%            | 62%  | 64%  | 66%  | 50%                | 49%  | 50%  | 51%  |
| South East            | 64%            | 67%  | 70%  | 72%  | 49%                | 50%  | 53%  | 52%  |
| North East            | 66%            | 59%  | 60%  | 59%  | 47%                | 43%  | 43%  | 43%  |
| <b>Past 12 months</b> |                |      |      |      |                    |      |      |      |
| East Midlands         | 61%            | 63%  | 65%  | 64%  | 41%                | 43%  | 45%  | 45%  |
| Yorkshire             | 60%            | 60%  | 63%  | 66%  | 44%                | 45%  | 43%  | 49%  |
| London                | 83%            | 80%  | 82%  | 82%  | 65%                | 62%  | 64%  | 63%  |
| North West            | 56%            | 57%  | 63%  | 61%  | 40%                | 42%  | 60%  | 44%  |
| East of England       | 61%            | 61%  | 62%  | 66%  | 47%                | 47%  | 47%  | 50%  |
| West Midlands         | 63%            | 63%  | 65%  | 67%  | 45%                | 45%  | 46%  | 48%  |
| South West            | 61%            | 60%  | 61%  | 63%  | 47%                | 47%  | 48%  | 49%  |
| South East            | 64%            | 64%  | 68%  | 69%  | 47%                | 48%  | 51%  | 49%  |
| North East            | 64%            | 60%  | 57%  | 58%  | 45%                | 43%  | 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.