

England Occupancy Survey

January 2013 Results

Note: Change in Occupancy Reporting

- 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.

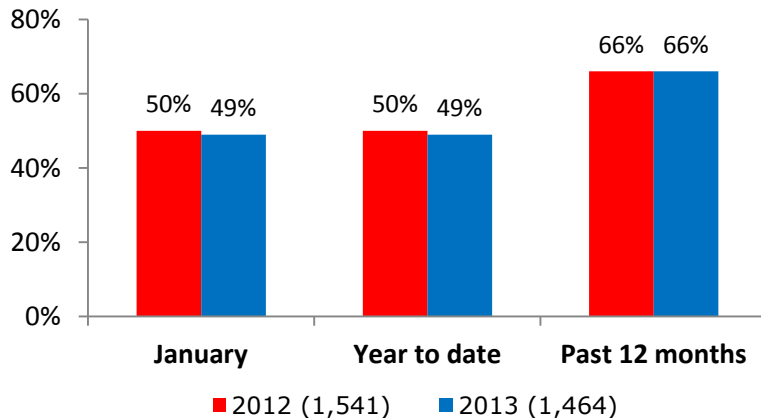


England Occupancy Reporting January 2013 (including data from STR Global)

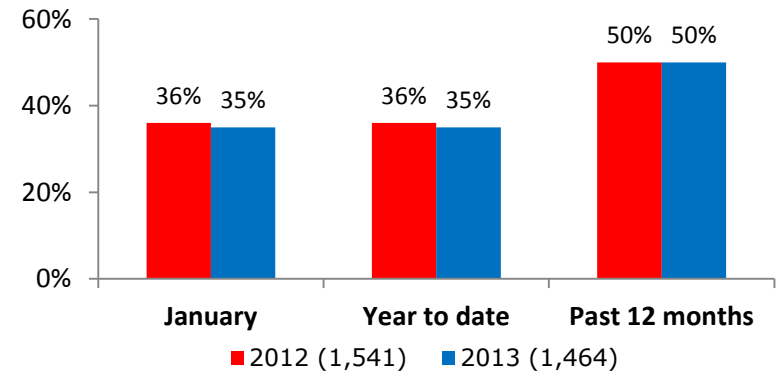
Monthly Update : January 2013

Across England as a whole, both room and bedspace occupancy fell slightly during January when compared with the same period in 2012. This was mirrored in the average year to date figures for both room and bedspace occupancy. The past 12 months average for room and bedspace occupancy remained static when compared with January 2012.

Room Occupancy



Bedspace Occupancy



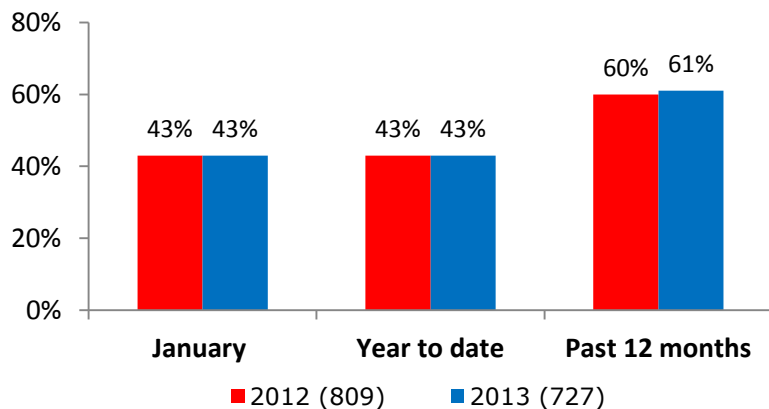
England Occupancy Reporting January 2013 (excluding data from STR Global)

Monthly Update : January 2013

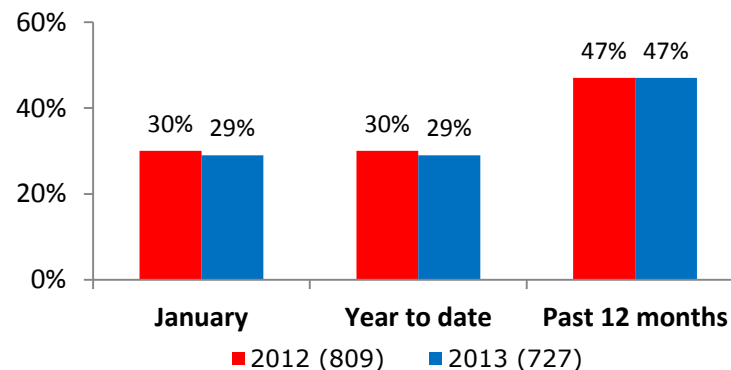
This update shows that in January 2013, room occupancy levels across England remained on a par with those achieved in January 2012. Bed occupancy decreased slightly during this period.

Room occupancy levels for the year to date average also remained the same whilst bedspace levels fell slightly. Over the past 12 months, room occupancy had risen slightly, although bed occupancy levels remained static when compared with the same period in 2012.

Room Occupancy



Bedspace Occupancy

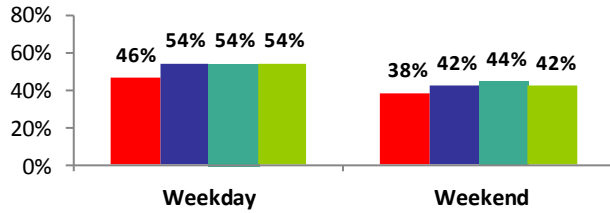


England Occupancy Reporting January 2013

- Across England as a whole, both room and bedspace occupancy fell slightly during January when compared with the same period in 2012.
- Although weekday room and bedspace occupancy had remained on a par with the previous year, weekend room and bed occupancy levels had fallen by 2 and 3 percentage points respectively when compared with the previous year.
- Only the guesthouse sector witnessed an increase in both room and bedspace occupancy in January 2013. The hotel sector saw a small decrease in both measures of occupancy when compared with the same month in 2012. B&B establishments remained on a par with those levels achieved during January 2012 for both room and bedspace occupancy.
- Room occupancy remained the same as the previous year for both seaside and countryside locations. Both city/large towns and small towns saw a small decrease during this month. With the exception of small towns, bed occupancy levels in the remaining locations witnessed a decrease compared with January 2012.
- Only the 26-50 size band had increased in both room and bedspace occupancy during January 2013 (up 4 percentage points for room and 1 for bedspace). Occupancy levels in the larger size bandings, 51-100 and 100+ had seen a decrease compared with 2012, with the 51-100 rooms seeing the biggest decrease in both measures of occupancy (4 and 3 points respectively). There was a mixed set of results for the smaller size bandings, with the 1-3 remaining static, the 4-10 down slightly and the 11-25 up by 2 percentage points for room and static in bedspace occupancy.

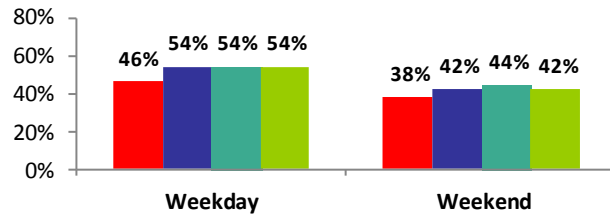
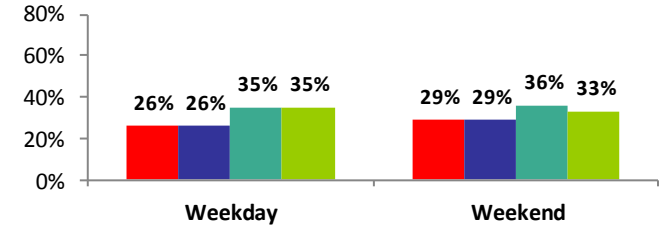
Weekday / Weekend

Room Occupancy

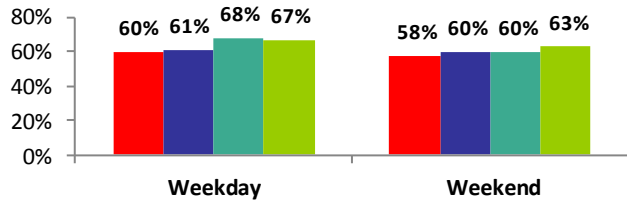
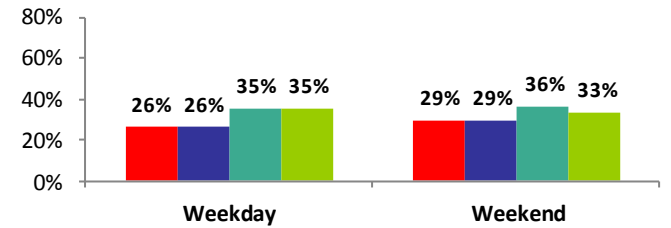


January 2013

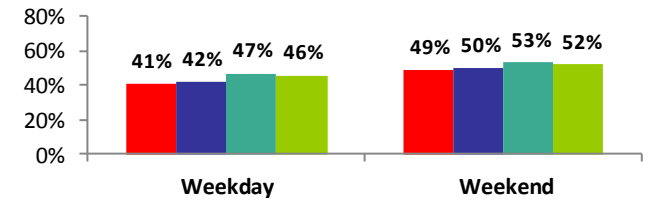
Bedspace Occupancy



Year to Date
(January 2013)



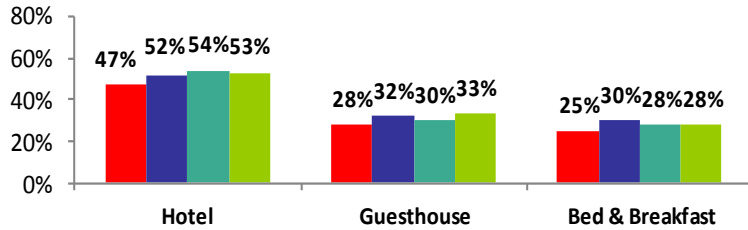
Past 12 Mths
(Feb 12 - Jan 13)



2010 2011 2012 2013

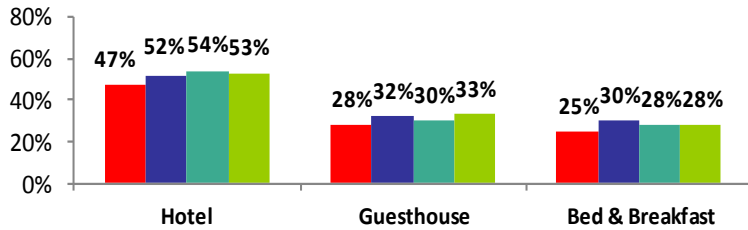
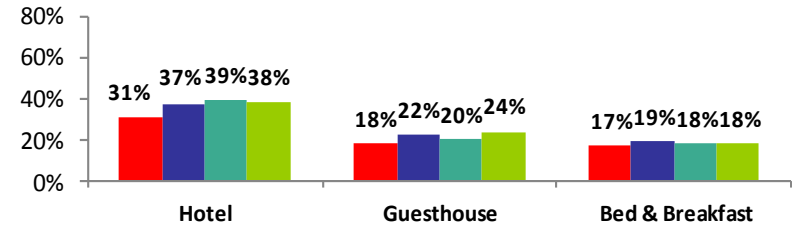
Establishment Type

Room Occupancy

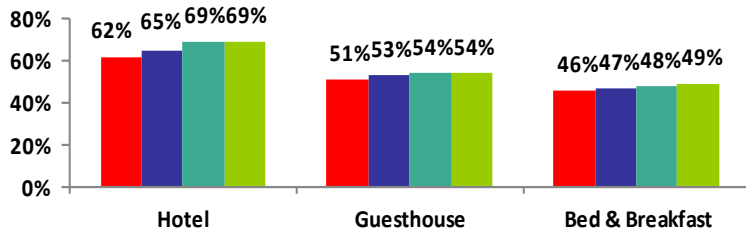
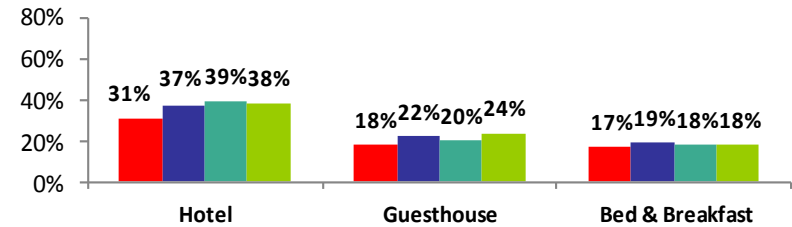


January 2013

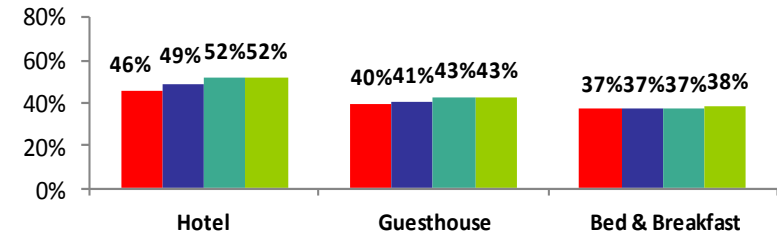
Bedspace Occupancy



Year to Date
(January 2013)



Past 12 Mths
(Feb 12 - Jan 13)

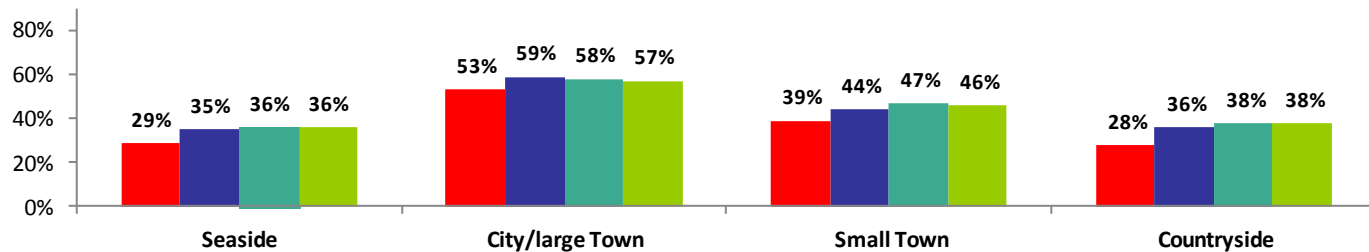


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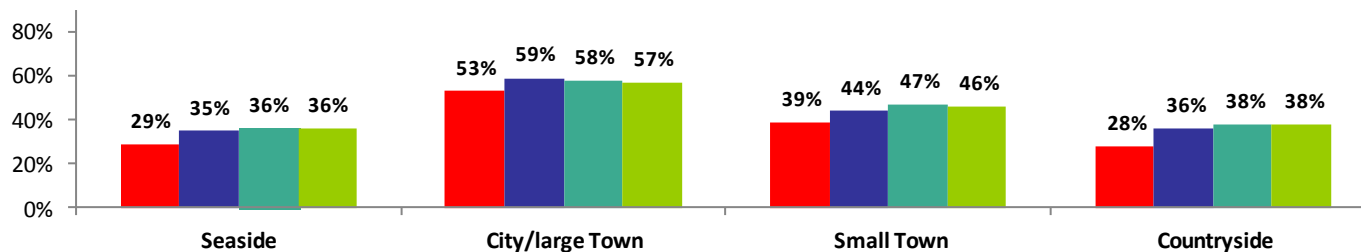
Location

Room Occupancy

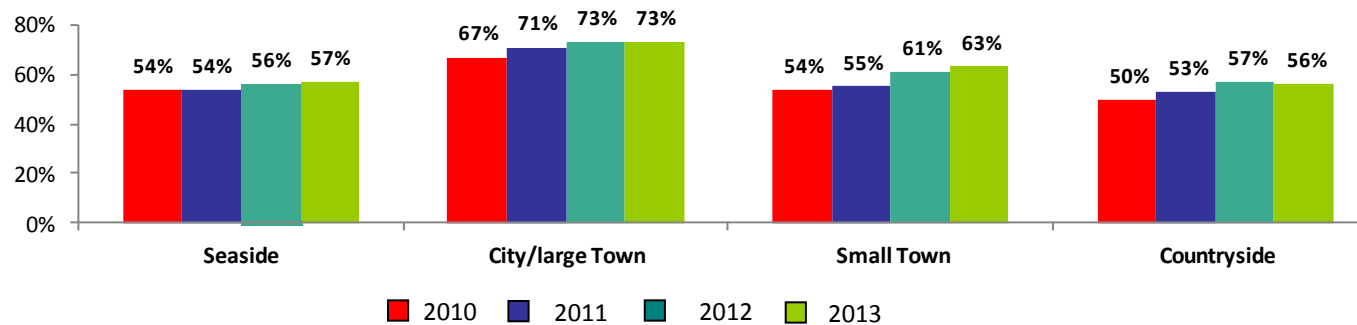
January 2013



Year to Date
(January 2013)



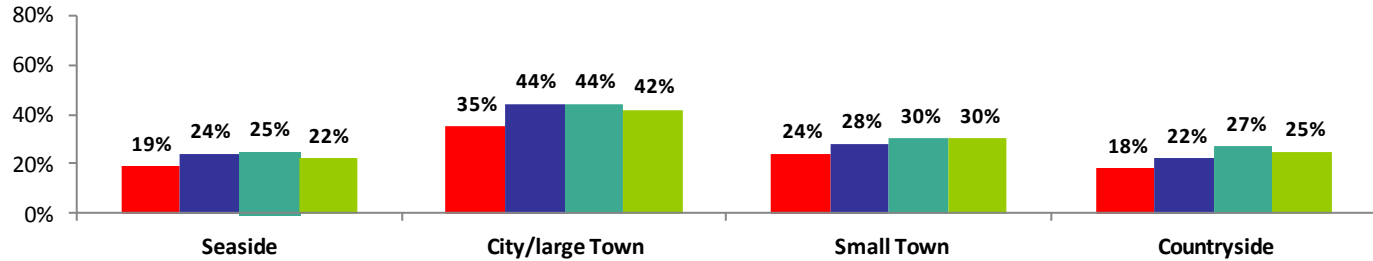
Past 12 months
(Feb 12– Jan 13)



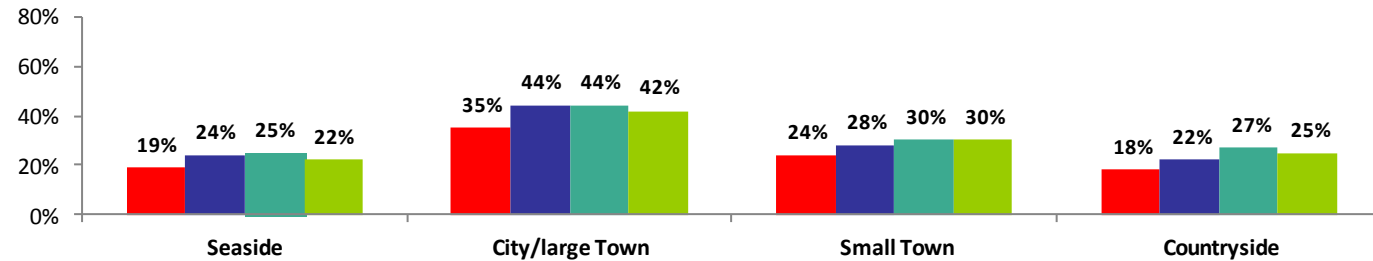
Location

Bedspace Occupancy

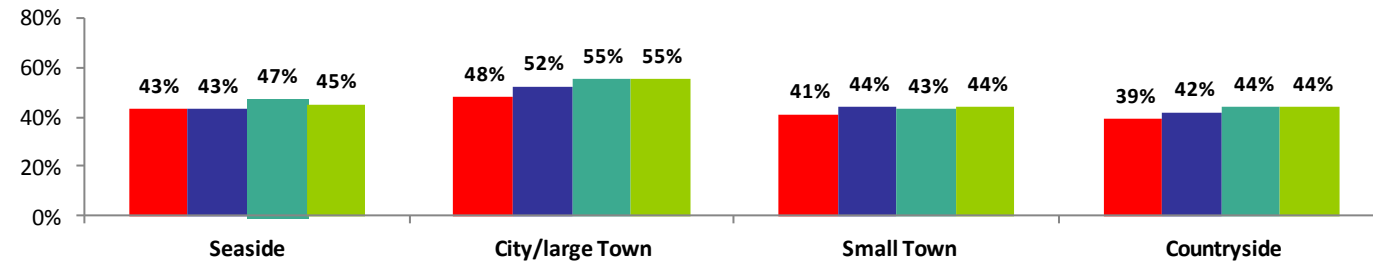
January 2013



Year to Date
(January 2013)



Past 12 months
(Feb 12– Jan 13)

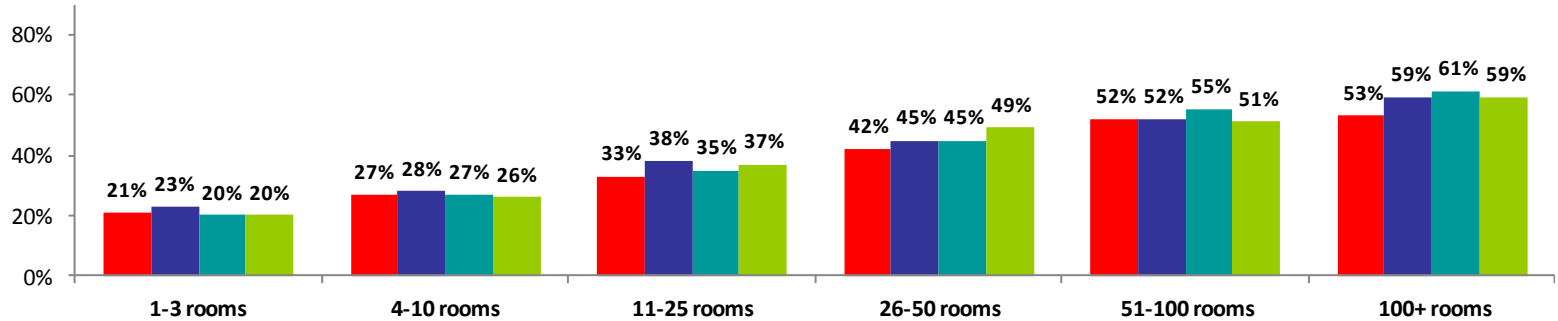


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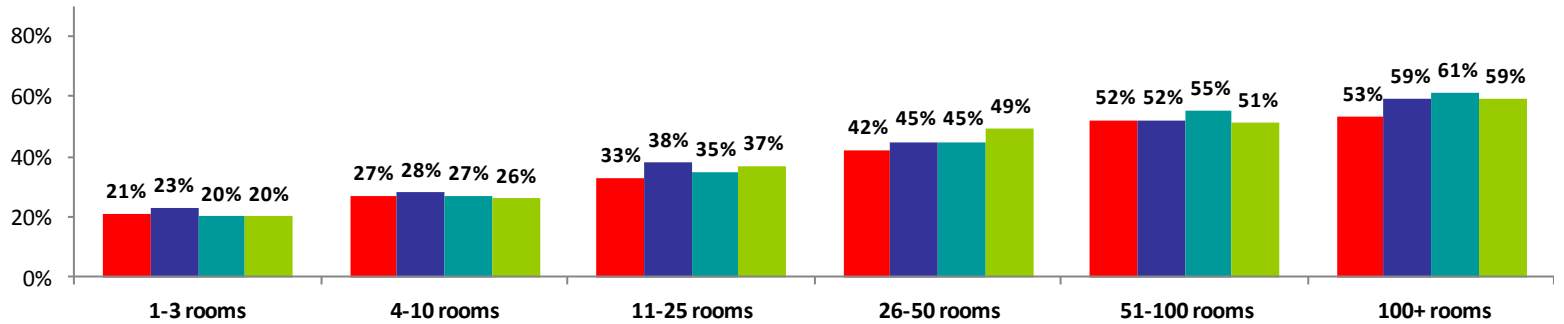
Number of Rooms

Room Occupancy

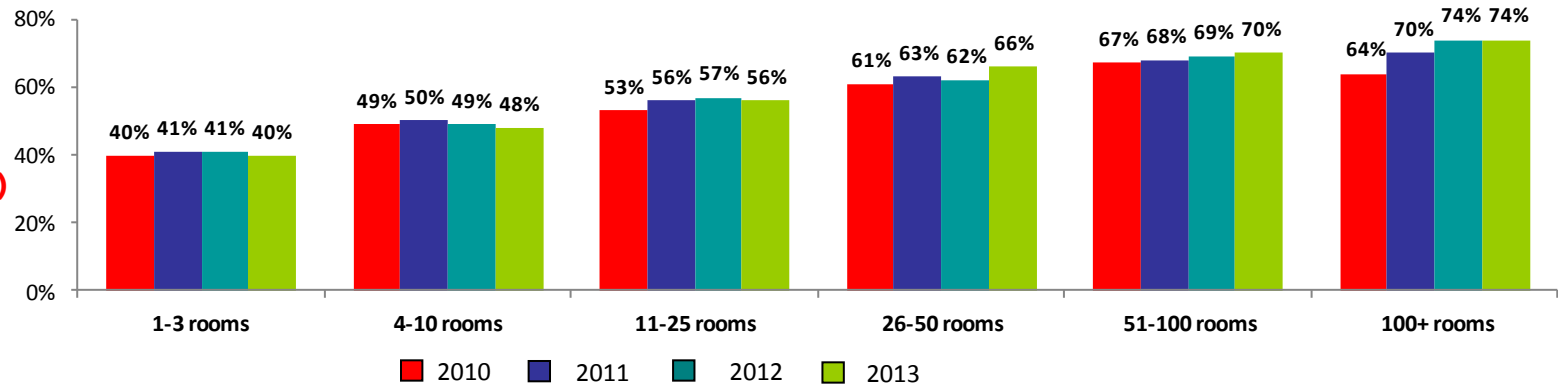
January 2013



Year to Date
(January 2013)



Past 12 Mths
(Feb 12 – Jan 13)

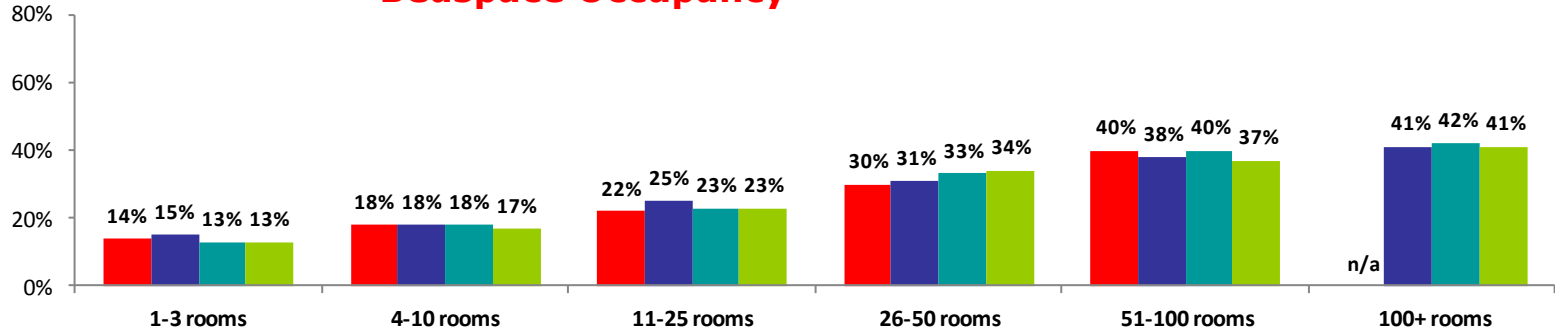


2010 2011 2012 2013

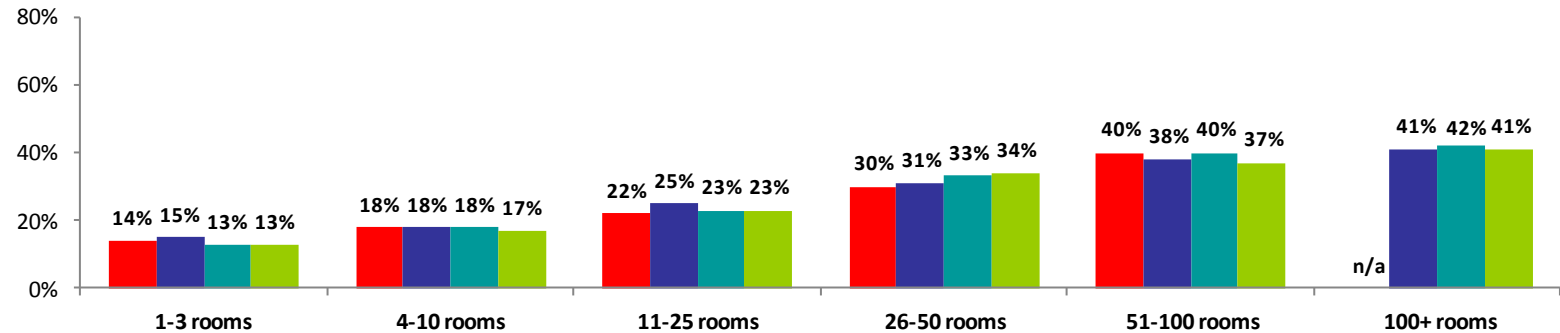
Number of Rooms

Bedspace Occupancy

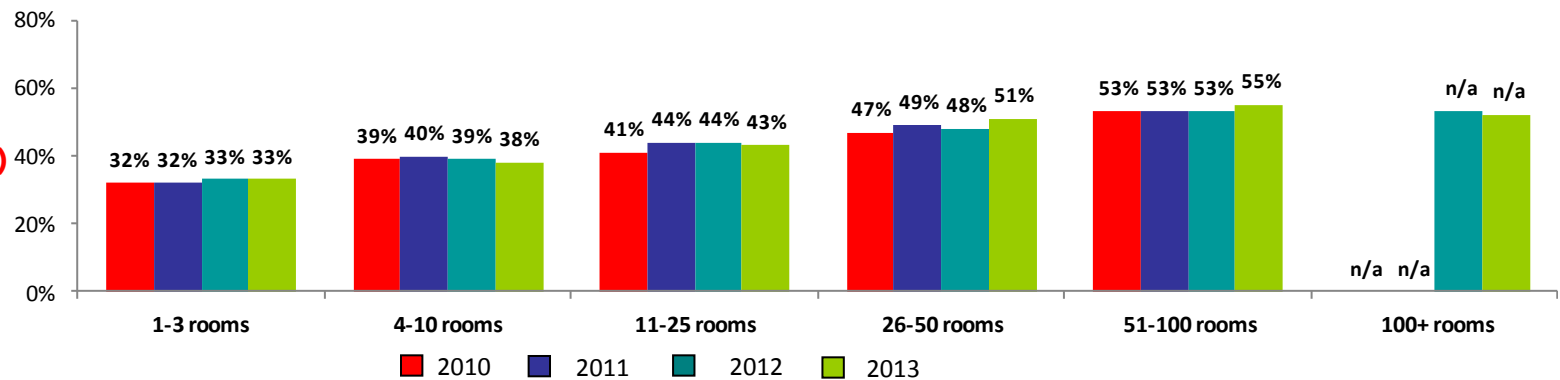
January 2013



Year to Date
(January 2013)



Past 12 Mths
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2010 2011 2012 2013