

England Occupancy Survey - January 2014

SUMMARY OF RESULTS

- Room occupancy in January increased by 3% compared with the same period in 2013, rising to 52%, with bedspace occupancy remaining broadly flat (+1%) at 36%.
- Both weekday and weekend room occupancy in January have increased against last year's figures (up 3% to 57% for weekday and up 2% to 44% for weekend occupancy). For bedspace, weekday occupancy increased slightly (up 2% to 37%) with weekend occupancy also up (by 3% to 36%).
- City/large town locations saw the biggest uplift in room occupancy in January (up 5% to 62%), with bedspace occupancy also up (+3% to 45%). Seaside locations saw an uplift in room and bedspace occupancy (+4% and +2% respectively). Small towns also saw increases in both room and bedspace occupancy (up 2% and 2% respectively), with occupancy in countryside locations showing the same pattern.
- Looking at occupancy by establishment type, hotels are up 3% for room occupancy whilst bedspace occupancy remained flat (+1%). Guest house room occupancy remained flat (-1%), whilst bedspace occupancy dropped slightly (by -2%). B&B's remained flat for both measures of occupancy (0% for room and +1% for bedspace).
- When looking at occupancy figures for December by number of rooms, almost all have witnessed increases compared with January last year. The 11-25 room category saw the greatest increases, at +4% for room and +4 for bedspace occupancy. The 100+ room category also saw the greatest increases (+3% for room and +2% for bedspace). The 51-100 room category was the only category to see a decline (flat for room and -3% for bedspace).
- There was some variability by region, with the East of England, South East and the South West seeing the largest increases in room occupancy when compared to January last year (up 6%, 4% and 4% respectively). The East of England and the South West also saw the biggest uplifts in bedspace occupancy (up 4% in each area).

Room and Bedspace Occupancy (including STR Global data)

| | Room Occupancy | | | Bedspace Occupancy | | |
|--------------------|----------------|------|-------|--------------------|------|-------|
| | 2013 | 2014 | % +/- | 2013 | 2014 | % +/- |
| January | 49% | 52% | +3% | 35% | 36% | +1% |
| Jan (Year to Date) | 49% | 52% | +3% | 35% | 36% | +1% |
| Past 12 months | 66% | 68% | +2% | 50% | 52% | +2% |

Room and Bedspace Occupancy (excluding STR Global data)

| | Room Occupancy | | | Bedspace Occupancy | | |
|--------------------|----------------|------|-------|--------------------|------|-------|
| | 2013 | 2014 | % +/- | 2013 | 2014 | % +/- |
| January | 43% | 44% | +1% | 29% | 29% | 0% |
| Jan (Year to Date) | 43% | 44% | +1% | 29% | 29% | 0% |
| Past 12 months | 61% | 63% | +2% | 47% | 49% | +2% |

Weekday/Weekend

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2011 | 2012 | 2013 | 2014 |
| January | | | | | | | | |
| Weekday | 54% | 54% | 54% | 57% | 26% | 35% | 35% | 37% |
| Weekend | 42% | 44% | 42% | 44% | 29% | 36% | 33% | 36% |
| Jan (Year to Date) | | | | | | | | |
| Weekday | 54% | 54% | 54% | 57% | 26% | 35% | 35% | 37% |
| Weekend | 42% | 44% | 42% | 44% | 29% | 36% | 33% | 36% |
| Past 12 months | | | | | | | | |
| Weekday | 61% | 68% | 67% | 70% | 42% | 47% | 46% | 48% |
| Weekend | 60% | 60% | 63% | 65% | 50% | 53% | 52% | 54% |

Location Type

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2011 | 2012 | 2013 | 2014 |
| January | | | | | | | | |
| Seaside | 35% | 36% | 36% | 40% | 24% | 25% | 22% | 24% |
| City/large town | 59% | 58% | 57% | 62% | 44% | 44% | 42% | 45% |
| Small town | 44% | 47% | 46% | 48% | 28% | 30% | 30% | 32% |
| Countryside | 36% | 38% | 38% | 40% | 22% | 27% | 25% | 27% |
| Jan (Year to Date) | | | | | | | | |
| Seaside | 35% | 36% | 36% | 40% | 24% | 25% | 22% | 24% |
| City/large town | 59% | 58% | 57% | 62% | 44% | 44% | 42% | 45% |
| Small town | 44% | 47% | 46% | 48% | 28% | 30% | 30% | 32% |
| Countryside | 36% | 38% | 38% | 40% | 22% | 27% | 25% | 27% |
| Past 12 months | | | | | | | | |
| Seaside | 54% | 56% | 57% | 60% | 43% | 47% | 45% | 49% |
| City/large town | 71% | 73% | 73% | 77% | 52% | 55% | 55% | 57% |
| Small town | 55% | 61% | 63% | 65% | 44% | 43% | 44% | 45% |
| Countryside | 53% | 57% | 56% | 59% | 42% | 44% | 44% | 46% |

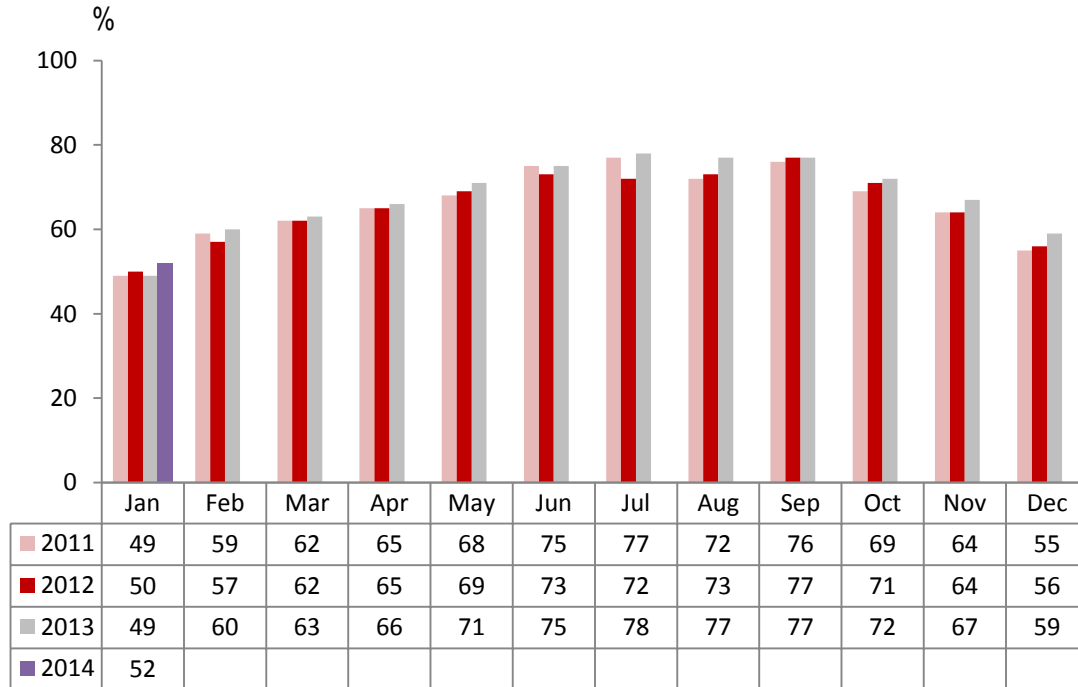
Establishment Type

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2011 | 2012 | 2013 | 2014 |
| January | | | | | | | | |
| Hotel | 52% | 54% | 53% | 56% | 37% | 39% | 38% | 39% |
| Guesthouse | 32% | 30% | 33% | 32% | 22% | 20% | 24% | 22% |
| B&B | 30% | 28% | 28% | 28% | 19% | 18% | 18% | 19% |
| Jan (Year to Date) | | | | | | | | |
| Hotel | 52% | 54% | 53% | 56% | 37% | 39% | 38% | 39% |
| Guesthouse | 32% | 30% | 33% | 32% | 22% | 20% | 24% | 22% |
| B&B | 30% | 28% | 28% | 28% | 19% | 18% | 18% | 19% |
| Past 12 months | | | | | | | | |
| Hotel | 65% | 69% | 69% | 72% | 49% | 52% | 52% | 54% |
| Guesthouse | 53% | 54% | 54% | 54% | 41% | 43% | 43% | 42% |
| B&B | 47% | 48% | 49% | 49% | 37% | 37% | 38% | 38% |

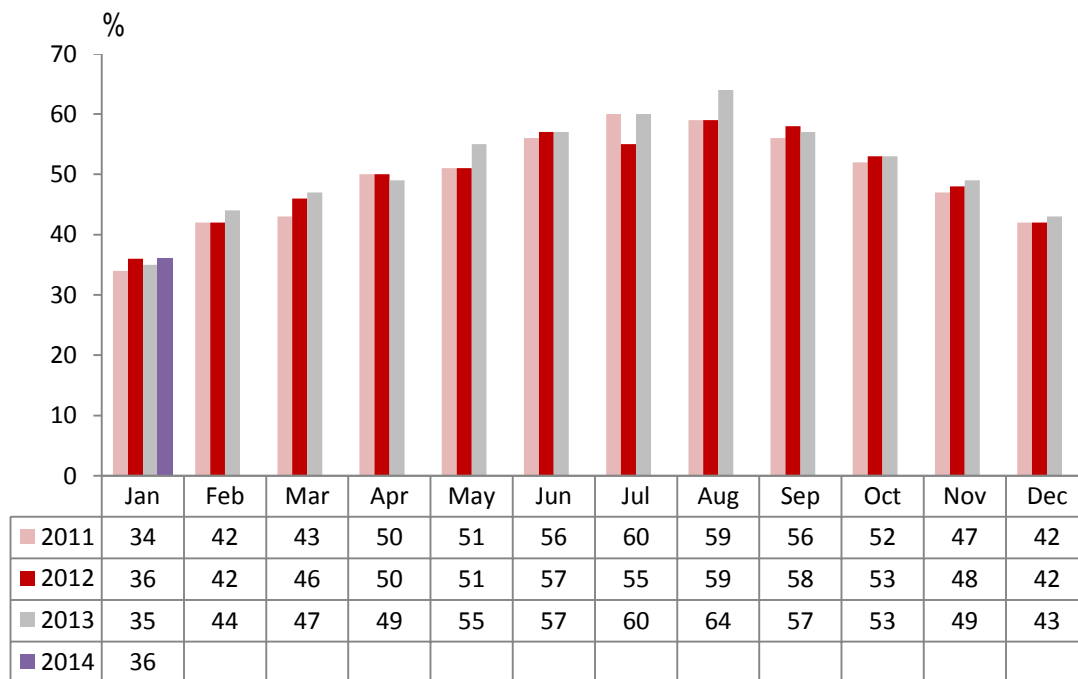
Number of rooms

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2011 | 2012 | 2013 | 2014 |
| January | | | | | | | | |
| 1-3 rooms | 23% | 20% | 20% | 21% | 15% | 13% | 13% | 15% |
| 4-10 rooms | 28% | 27% | 26% | 27% | 18% | 18% | 17% | 18% |
| 11-25 rooms | 38% | 35% | 37% | 41% | 25% | 23% | 23% | 27% |
| 26-50 rooms | 45% | 45% | 49% | 50% | 31% | 33% | 34% | 35% |
| 51-100 rooms | 52% | 55% | 51% | 51% | 38% | 40% | 37% | 34% |
| 100+ rooms | 59% | 61% | 59% | 62% | 41% | 42% | 41% | 43% |
| Jan (Year to Date) | | | | | | | | |
| 1-3 rooms | 23% | 20% | 20% | 21% | 15% | 13% | 13% | 15% |
| 4-10 rooms | 28% | 27% | 26% | 27% | 18% | 18% | 17% | 18% |
| 11-25 rooms | 38% | 35% | 37% | 41% | 25% | 23% | 23% | 27% |
| 26-50 rooms | 45% | 45% | 49% | 50% | 31% | 33% | 34% | 35% |
| 51-100 rooms | 52% | 55% | 51% | 51% | 38% | 40% | 37% | 34% |
| 100+ rooms | 59% | 61% | 59% | 62% | 41% | 42% | 41% | 43% |
| Past 12 months | | | | | | | | |
| 1-3 rooms | 41% | 41% | 40% | 42% | 32% | 33% | 33% | 34% |
| 4-10 rooms | 50% | 49% | 48% | 50% | 40% | 39% | 38% | 39% |
| 11-25 rooms | 56% | 57% | 56% | 59% | 44% | 44% | 43% | 44% |
| 26-50 rooms | 63% | 62% | 66% | 69% | 49% | 48% | 51% | 54% |
| 51-100 rooms | 68% | 69% | 70% | 69% | 53% | 53% | 55% | 54% |
| 100+ rooms | 70% | 74% | 74% | 76% | n/a | 53% | 52% | 54% |

England Room Occupancy by Month



England Bedspace Occupancy by Month



Regional Information

| | Room Occupancy | | | | Bedspace Occupancy | | | |
|---------------------------|----------------|------|------|------|--------------------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2011 | 2012 | 2013 | 2014 |
| January | | | | | | | | |
| East Midlands | 49% | 50% | 48% | 47% | 30% | 30% | 31% | 31% |
| Yorkshire | 43% | 44% | 45% | 47% | 30% | 30% | 30% | 33% |
| London | 68% | 70% | 64% | 65% | 53% | 53% | 50% | 50% |
| North West | 45% | 41% | 45% | 43% | 31% | 29% | 30% | 31% |
| East of England | 44% | 47% | 44% | 51% | 31% | 33% | 31% | 35% |
| West Midlands | 48% | 46% | 48% | 50% | 32% | 30% | 31% | 34% |
| South West | 39% | 40% | 39% | 43% | 28% | 28% | 27% | 31% |
| South East | 45% | 46% | 48% | 52% | 30% | 33% | 32% | 33% |
| North East | 48% | 41% | 36% | 38% | 30% | 28% | 24% | 27% |
| Jan (Year to Date) | | | | | | | | |
| East Midlands | 49% | 50% | 48% | 47% | 30% | 30% | 31% | 31% |
| Yorkshire | 43% | 44% | 45% | 47% | 30% | 30% | 30% | 33% |
| London | 68% | 70% | 64% | 65% | 53% | 53% | 50% | 50% |
| North West | 45% | 41% | 45% | 43% | 31% | 29% | 30% | 31% |
| East of England | 44% | 47% | 44% | 51% | 31% | 33% | 31% | 35% |
| West Midlands | 48% | 46% | 48% | 50% | 32% | 30% | 31% | 34% |
| South West | 39% | 40% | 39% | 43% | 28% | 28% | 27% | 31% |
| South East | 45% | 46% | 48% | 52% | 30% | 33% | 32% | 33% |
| North East | 48% | 41% | 36% | 38% | 30% | 28% | 24% | 27% |
| Past 12 months | | | | | | | | |
| East Midlands | 57% | 62% | 63% | 64% | 39% | 41% | 41% | 44% |
| Yorkshire | 56% | 60% | 61% | 64% | 42% | 44% | 45% | 48% |
| London | 80% | 82% | 80% | 82% | 64% | 64% | 62% | 64% |
| North West | 56% | 56% | 59% | 60% | 42% | 41% | 43% | 44% |
| East of England | 57% | 61% | 61% | 64% | 45% | 48% | 47% | 48% |
| West Midlands | 60% | 63% | 63% | 65% | 48% | 45% | 45% | 46% |
| South West | 58% | 61% | 60% | 62% | 46% | 48% | 46% | 48% |
| South East | 56% | 63% | 66% | 69% | 44% | 48% | 48% | 51% |
| North East | 52% | 66% | 56% | 58% | 36% | 47% | 40% | 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.