

## England Occupancy Survey - January 2015

### SUMMARY OF RESULTS

- Room occupancy in January was up +2% to 54%, with bedspace occupancy also up, by +3% to 39%.
- Weekday occupancy in January was up for both room and bedspace occupancy (+3% and +2%), with weekend occupancy the same for both measures, (+3% for room and +2%).
- Occupancy levels were up across all location types for both room and bedspace, apart from countryside, which remained flat. Seaside saw the biggest uplift compared to January last year (+4% and +5% respectively), although city/large town locations saw highest occupancy levels overall.
- Looking at occupancy by establishment type, hotels saw a +2% increase for both room and bedspace, with guesthouses up +3% and +2% respectively. B&B's saw increases of +3% for both measures.
- Looking at number of rooms, increases are evident across most of the size categories, with a couple of the categories remaining flat for room occupancy. The 4-10 room category saw the biggest uplift compared to January last year, with both room and bedspace occupancy up +4%. The 11-25 and 100+ room categories also saw increases of +2% for both room and bedspace.
- Looking at occupancy by region, there were increases across all regions for the month, and for both measures, apart from the East of England, which remained flat for room occupancy. The biggest increases were in the North East, South East, South West and West Midlands.

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

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
<b>January</b>	<b>52%</b>	<b>54%</b>	<b>+2%</b>	<b>36%</b>	<b>39%</b>	<b>+3%</b>
Jan (Year to Date)	52%	54%	+2%	36%	39%	+3%
Past 12 months	68%	70%	+2%	52%	52%	0%

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

	Room Occupancy			Bedspace Occupancy		
	2014	2015	% +/-	2014	2015	% +/-
<b>January</b>	<b>44%</b>	<b>45%</b>	<b>+1%</b>	<b>29%</b>	<b>30%</b>	<b>+1%</b>
Jan (Year to Date)	44%	45%	+1%	29%	30%	+1%
Past 12 months	62%	63%	+1%	48%	48%	0%

## Weekday/Weekend

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>January</b>								
Weekday	54%	54%	57%	60%	35%	35%	37%	39%
Weekend	44%	42%	44%	47%	36%	33%	36%	38%
<b>Jan (Year to Date)</b>								
Weekday	54%	54%	57%	60%	35%	35%	37%	39%
Weekend	44%	42%	44%	47%	36%	33%	36%	38%
<b>Past 12 months</b>								
Weekday	68%	67%	70%	72%	47%	46%	48%	50%
Weekend	60%	63%	65%	66%	53%	52%	54%	54%

## Location Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>January</b>								
Seaside	36%	36%	40%	44%	25%	22%	24%	29%
City/large town	58%	57%	62%	64%	44%	42%	45%	46%
Small town	47%	46%	48%	51%	30%	30%	32%	34%
Countryside	38%	38%	40%	40%	27%	25%	27%	27%
<b>Jan (Year to Date)</b>								
Seaside	36%	36%	40%	44%	25%	22%	24%	29%
City/large town	58%	57%	62%	64%	44%	42%	45%	46%
Small town	47%	46%	48%	51%	30%	30%	32%	34%
Countryside	38%	38%	40%	40%	27%	25%	27%	27%
<b>Past 12 months</b>								
Seaside	56%	57%	60%	62%	47%	45%	49%	48%
City/large town	73%	73%	77%	78%	55%	55%	57%	57%
Small town	61%	63%	65%	65%	43%	44%	45%	46%
Countryside	57%	56%	59%	59%	44%	44%	46%	45%

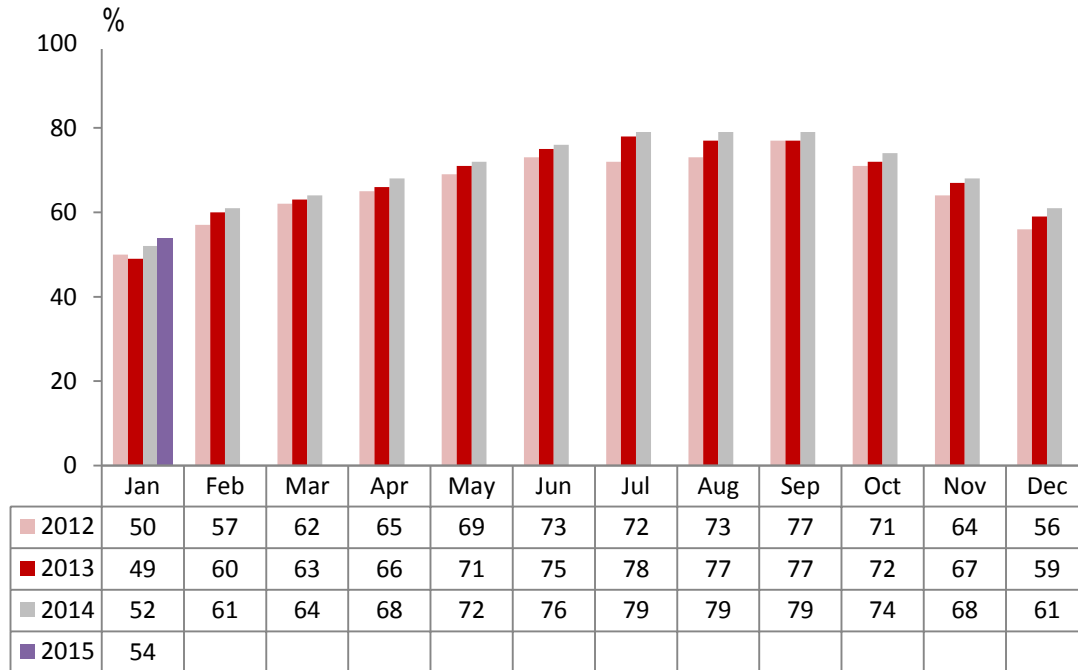
## Establishment Type

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>January</b>								
Hotel	54%	53%	56%	58%	39%	38%	39%	41%
Guesthouse	30%	33%	32%	35%	20%	24%	22%	24%
B&B	28%	28%	28%	31%	18%	18%	19%	22%
<b>Jan(Year to Date)</b>								
Hotel	54%	53%	56%	58%	39%	38%	39%	41%
Guesthouse	30%	33%	32%	35%	20%	24%	22%	24%
B&B	28%	28%	28%	31%	18%	18%	19%	22%
<b>Past 12 months</b>								
Hotel	69%	69%	72%	73%	52%	52%	54%	54%
Guesthouse	54%	54%	54%	56%	43%	43%	42%	43%
B&B	48%	49%	49%	51%	37%	38%	38%	41%

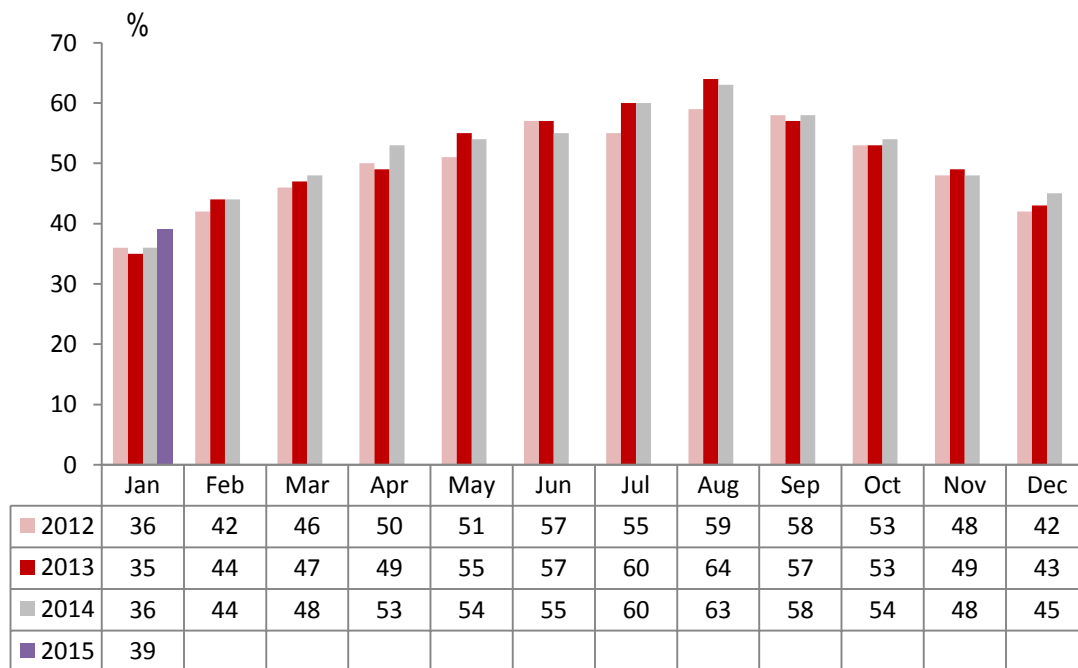
## Number of rooms

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>January</b>								
1-3 rooms	20%	20%	21%	23%	13%	13%	15%	15%
4-10 rooms	27%	26%	27%	31%	18%	17%	18%	22%
11-25 rooms	35%	37%	41%	43%	23%	23%	27%	29%
26-50 rooms	45%	49%	50%	49%	33%	34%	35%	37%
51-100 rooms	55%	51%	51%	50%	40%	37%	34%	36%
100+ rooms	61%	59%	62%	64%	42%	41%	43%	45%
<b>Jan(Year to Date)</b>								
1-3 rooms	20%	20%	21%	23%	13%	13%	15%	15%
4-10 rooms	27%	26%	27%	31%	18%	17%	18%	22%
11-25 rooms	35%	37%	41%	43%	23%	23%	27%	29%
26-50 rooms	45%	49%	50%	49%	33%	34%	35%	37%
51-100 rooms	55%	51%	51%	50%	40%	37%	34%	36%
100+ rooms	61%	59%	62%	64%	42%	41%	43%	45%
<b>Past 12 months</b>								
1-3 rooms	41%	40%	42%	43%	33%	33%	34%	35%
4-10 rooms	49%	48%	50%	52%	39%	38%	39%	41%
11-25 rooms	57%	56%	59%	61%	44%	43%	44%	46%
26-50 rooms	62%	66%	69%	69%	48%	51%	54%	53%
51-100 rooms	69%	70%	69%	67%	53%	55%	54%	54%
100+ rooms	74%	74%	76%	78%	53%	52%	54%	55%

## England Room Occupancy by Month



## England Bedspace Occupancy by Month



## Regional Information

	Room Occupancy				Bedspace Occupancy			
	2012	2013	2014	2015	2012	2013	2014	2015
<b>January</b>								
East Midlands	50%	48%	47%	50%	30%	31%	31%	34%
Yorkshire	44%	45%	47%	50%	30%	30%	33%	35%
London	70%	64%	65%	68%	53%	50%	50%	52%
North West	41%	45%	43%	45%	29%	30%	31%	32%
East of England	47%	44%	51%	51%	33%	31%	35%	36%
West Midlands	46%	48%	50%	55%	30%	31%	34%	37%
South West	40%	39%	43%	47%	28%	27%	31%	34%
South East	46%	48%	52%	56%	33%	32%	33%	37%
North East	41%	36%	38%	52%	28%	24%	27%	34%
<b>Jan(Year to Date)</b>								
East Midlands	50%	48%	47%	50%	30%	31%	31%	34%
Yorkshire	44%	45%	47%	50%	30%	30%	33%	35%
London	70%	64%	65%	68%	53%	50%	50%	52%
North West	41%	45%	43%	45%	29%	30%	31%	32%
East of England	47%	44%	51%	51%	33%	31%	35%	36%
West Midlands	46%	48%	50%	55%	30%	31%	34%	37%
South West	40%	39%	43%	47%	28%	27%	31%	34%
South East	46%	48%	52%	56%	33%	32%	33%	37%
North East	41%	36%	38%	52%	28%	24%	27%	34%
<b>Past 12 months</b>								
East Midlands	62%	63%	64%	65%	41%	41%	44%	46%
Yorkshire	60%	61%	64%	67%	44%	45%	48%	49%
London	82%	80%	82%	82%	64%	62%	64%	63%
North West	56%	59%	60%	61%	41%	43%	44%	45%
East of England	61%	61%	64%	67%	48%	47%	48%	50%
West Midlands	63%	63%	65%	69%	45%	45%	46%	49%
South West	61%	60%	62%	64%	48%	46%	48%	50%
South East	63%	66%	69%	71%	48%	48%	51%	51%
North East	66%	56%	58%	60%	47%	40%	41%	42%

## 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.