

England Occupancy Survey

August 2011 Results

Note: Change in Occupancy Reporting

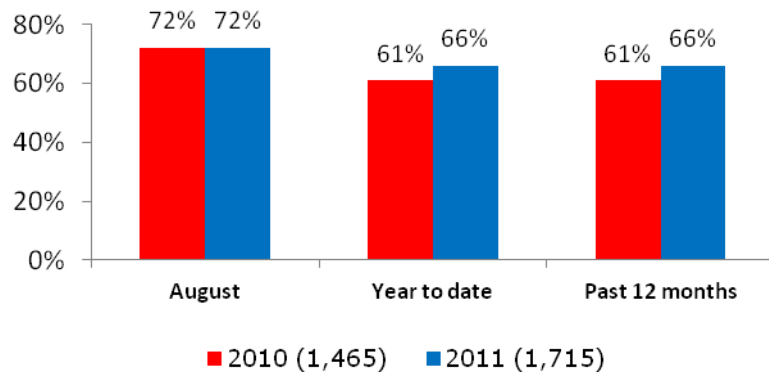
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas, business travellers vs. non business travellers).
- **From June 2011, STR data is included in the single month analysis (August) and the 2011 year to date and past 12 months data. It is not included in the past 12 month or year-to-date data for previous years as we only have STR data available from June 2010.**
- 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.

England Occupancy Reporting August 2011 (including data from STR Global)

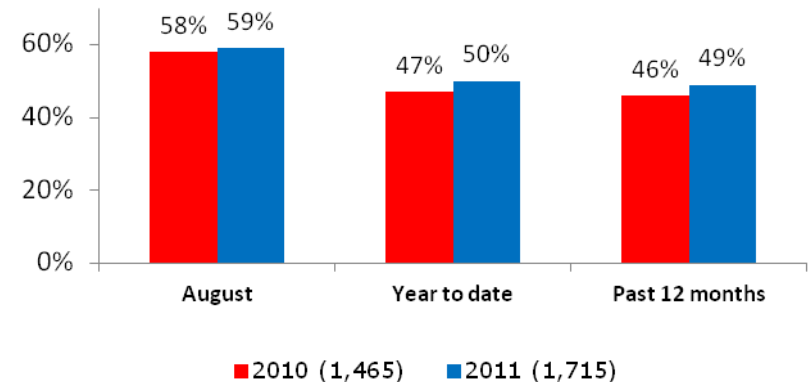
Monthly Update : August 2011

This update shows that in August England room occupancy levels remained static with the previous year, whilst bed occupancy levels witnessed a slight increase compared with August 2010. Room and bed occupancy levels for the year to date average and the past 12 months were all above the levels achieved during the same period last year.

Room Occupancy



Bedspace Occupancy

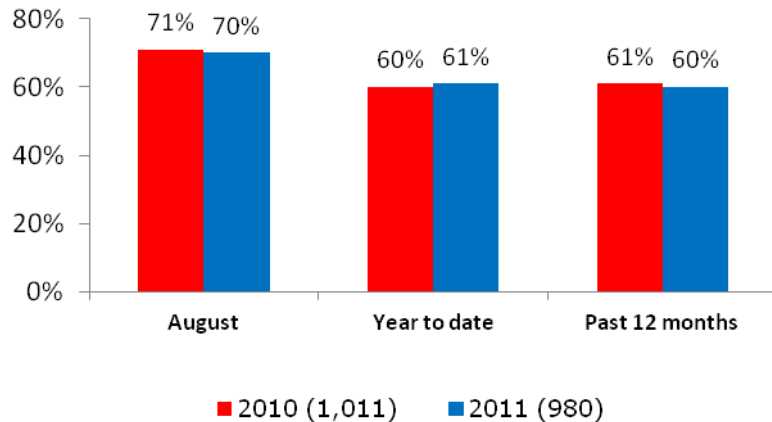


England Occupancy Reporting August 2011 (excluding data from STR Global)

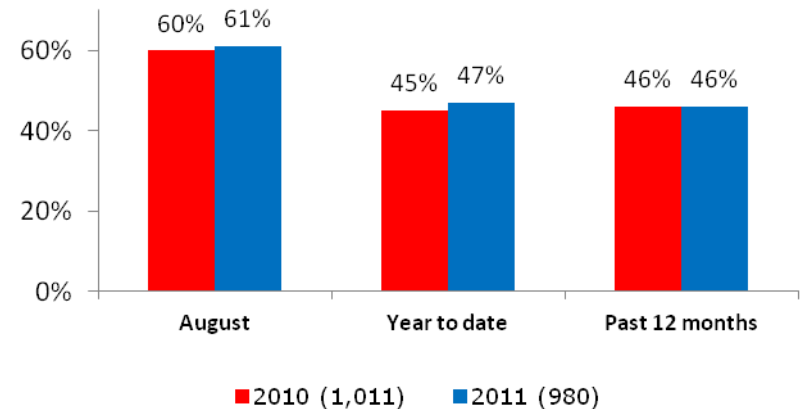
Monthly Update : August 2011

This update shows that in August 2011 England witnessed a slight decrease in room occupancy levels compared with August 2010 and a slight increase in bed occupancy levels compared with the previous year. Room and bed occupancy levels for the year to date average increased slightly compared with the same period last year. Room occupancy for the past 12 months average witnessed a slight decrease on the levels achieved in August 2010, with bed occupancy levels remaining static with August 2010 levels.

Room Occupancy



Bedspace Occupancy



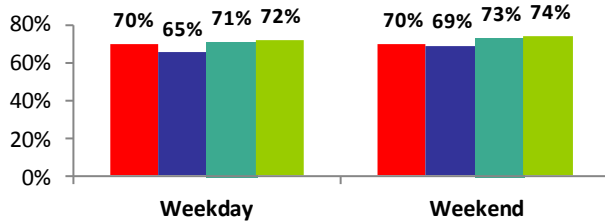
England Occupancy Reporting

August 2011

- Across England as a whole, room occupancy remained static with the levels achieved in August 2010 and bed occupancy levels witnessed a slight increase compared with the same period last year.
- Weekday and weekend room and bed occupancy levels in August 2011 were slightly above the August 2010 levels.
- Room occupancy levels in the Hotel and guesthouse categories in August 2011 had remained static with the levels achieved during the same period last year. The bed and breakfast category witnessed an increase on the levels witnessed during August 2010. Bed occupancy levels across all categories had increased slightly on the levels achieved during August 2010.
- Small town and Countryside locations witnessed a slight increase in room occupancy levels compared with August 2010, with seaside locations and city/large towns decreasing slightly. Bed occupancy levels in seaside and countryside locations also increased on the levels achieved in August 2010, with the city/large town and small town locations remaining static with August 2010 levels.
- Room occupancy levels in the 1-3 and 51-100 size bands had increased compared with August 2010 percentages and remained static in the 100+ category. Bed occupancy levels increased in the 1-3, 51-100 and 100+ size bands compared with the previous year.

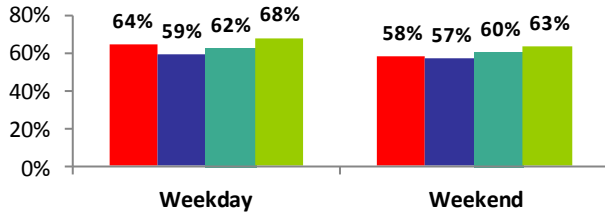
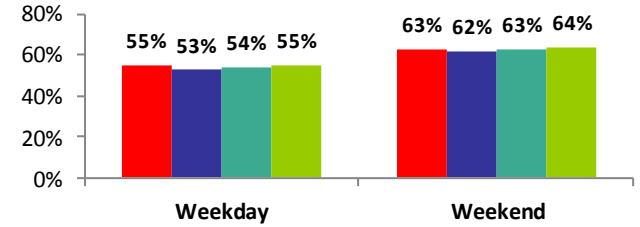
Weekday / Weekend

Room Occupancy

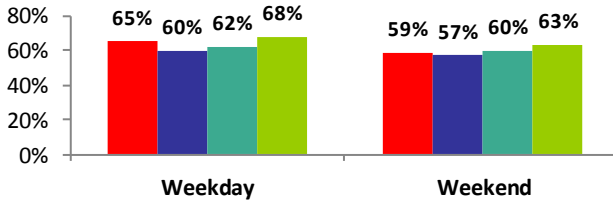
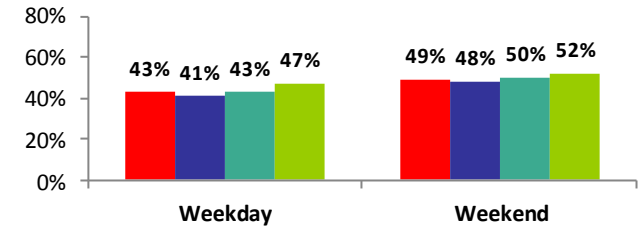


August 2011

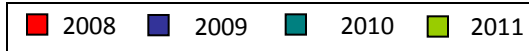
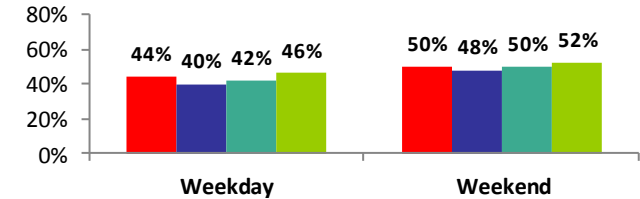
Bedspace Occupancy



Year to Date
(Jan 11 - Aug 11)

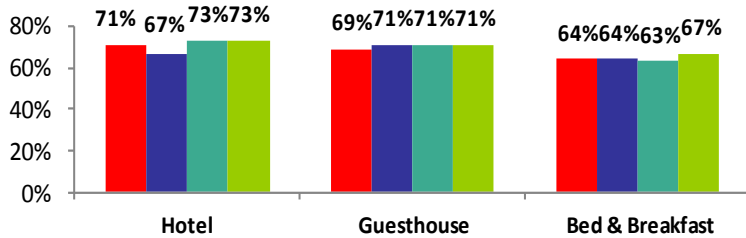


Past 12 Mths
(Sept 10 - Aug 11)



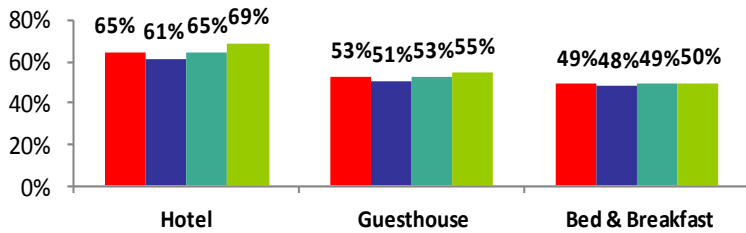
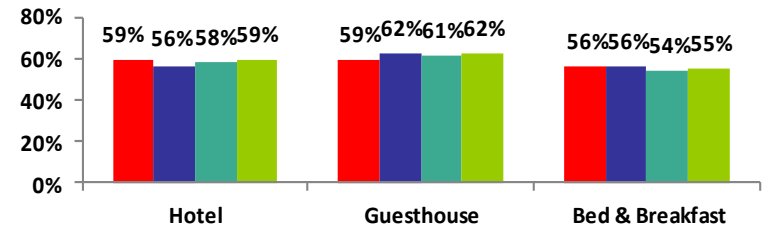
Establishment Type

Room Occupancy

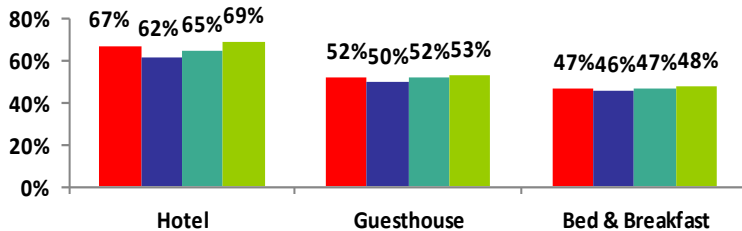
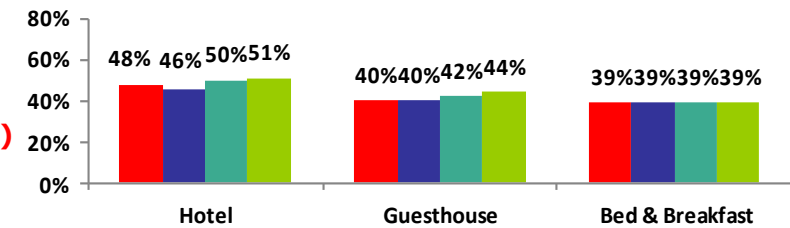


August 2011

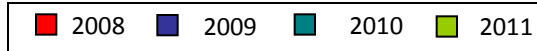
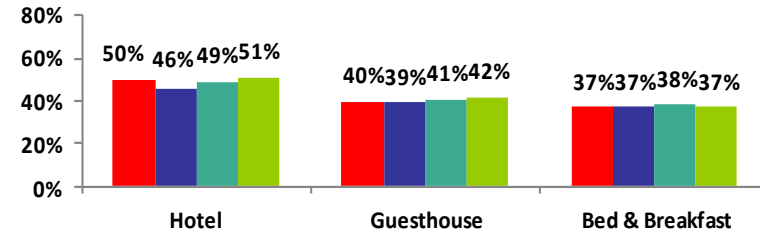
Bedspace Occupancy



Year to Date
(Jan 11 - Aug 11)



Past 12 Mths
(Sept 10 - Aug 11)

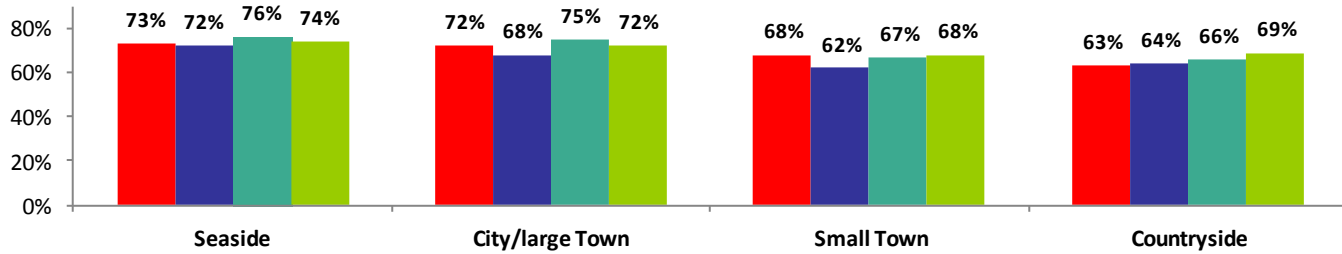


STR data is included in the year to date and past 12 months information for 2011 – for the Hotel sector only

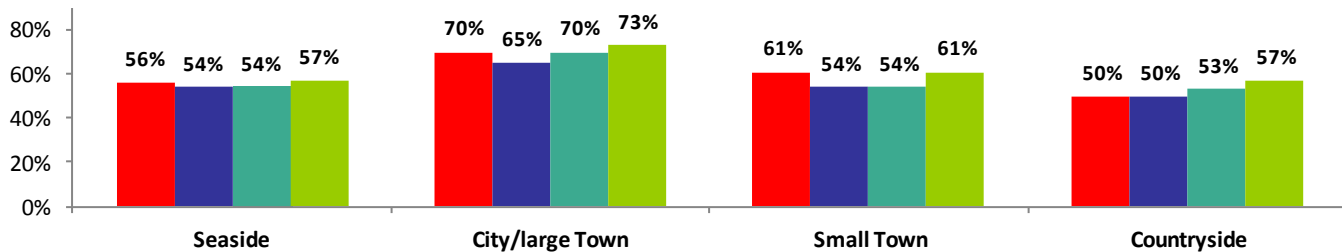
Location

Room Occupancy

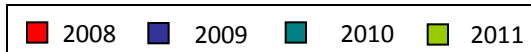
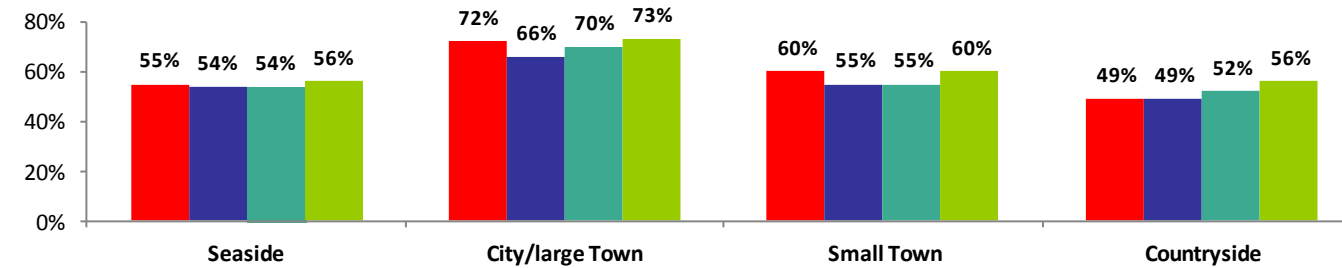
August 2011



Year to Date
(Jan 11 - Aug 11)



Past 12 months
(Sept 10- Aug 11)

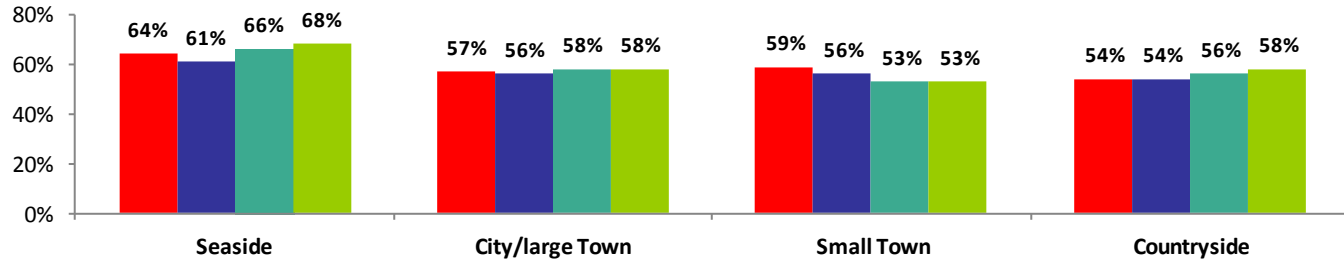


STR data is included in the year to date and past 12 months information for 2011 only

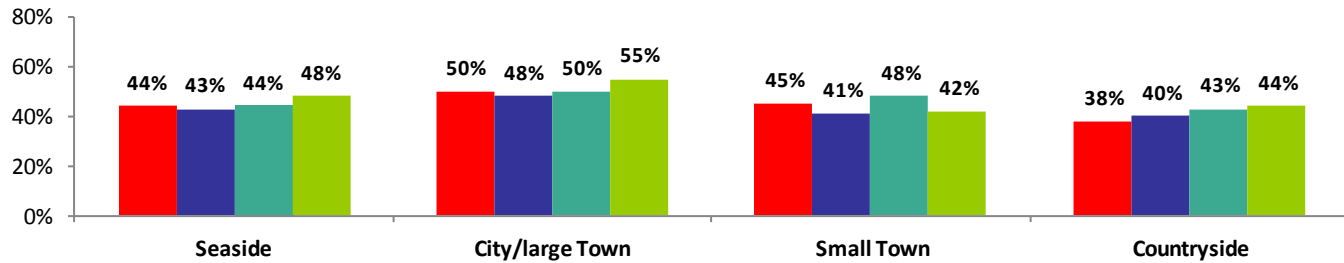
Location

Bedspace Occupancy

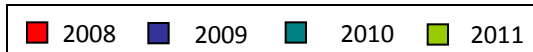
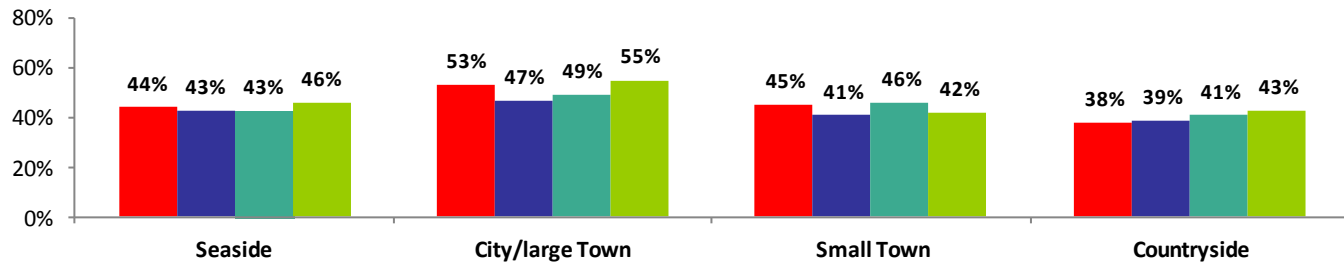
August 2011



Year to Date
(Jan 11 - Aug 11)



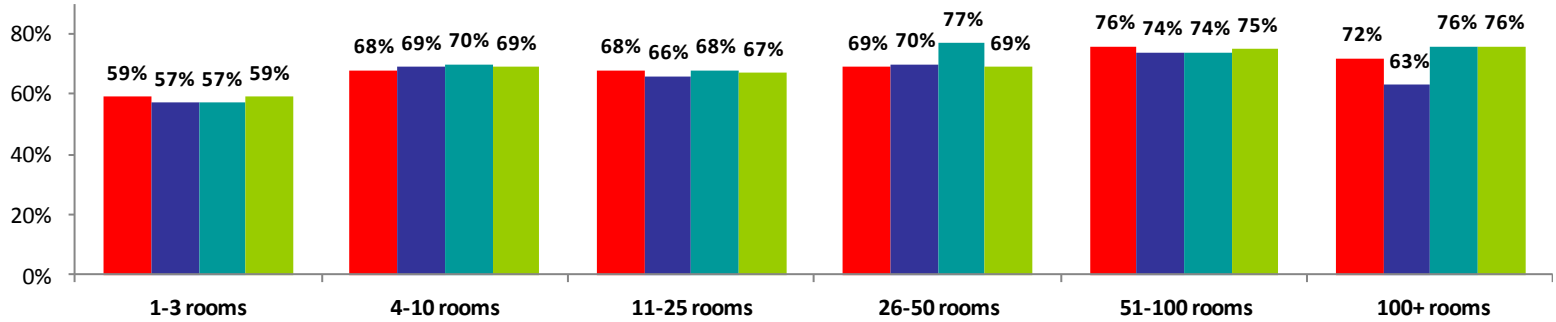
Past 12 months
(Sept 10- Aug 11)



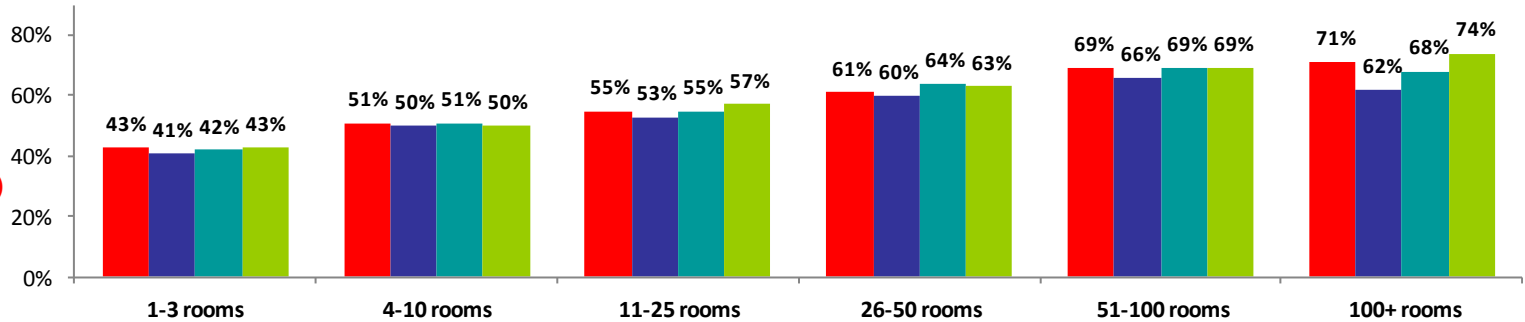
Number of Rooms

Room Occupancy

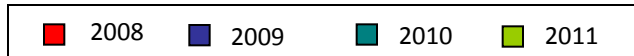
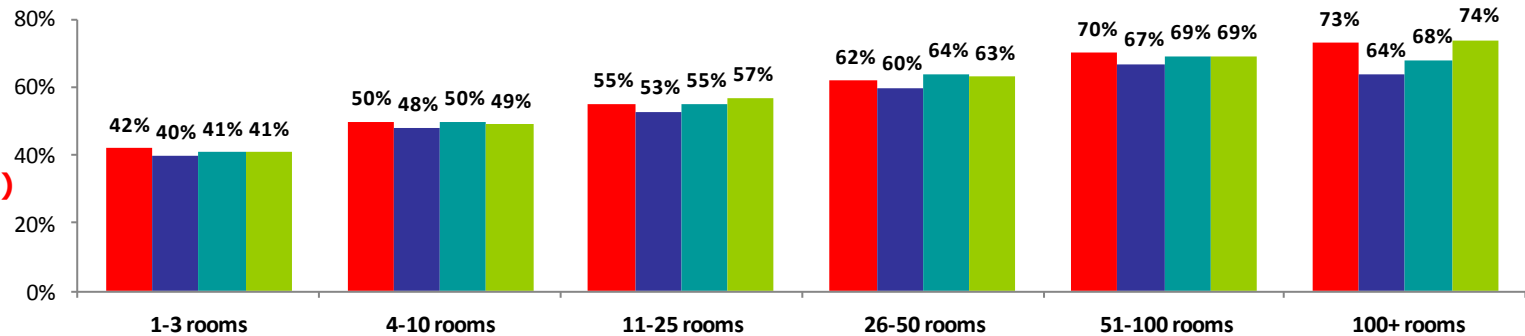
August 2011



Year to Date
(Jan 11 - Aug 11)



Past 12 Mths
(Sept 10 - Aug 11)

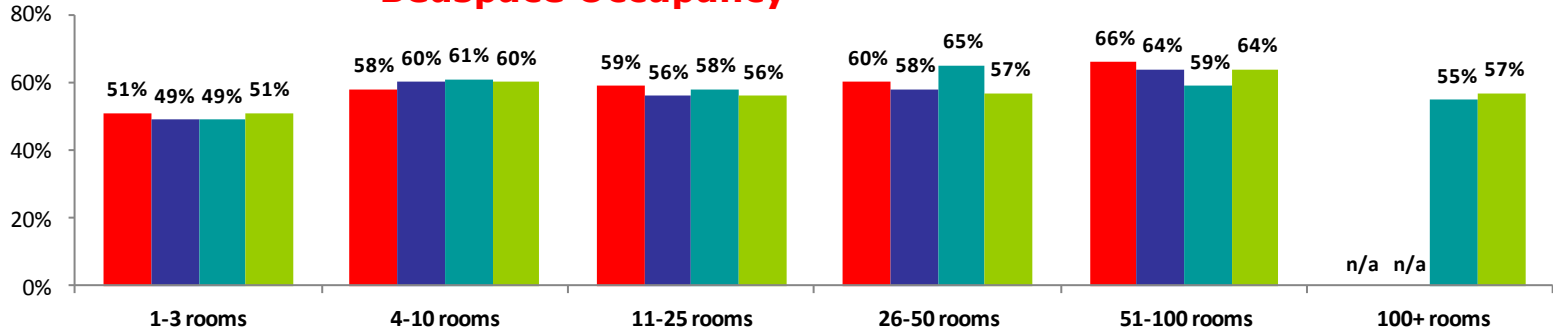


STR data is included in the year to date and past 12 months information for 2011 only

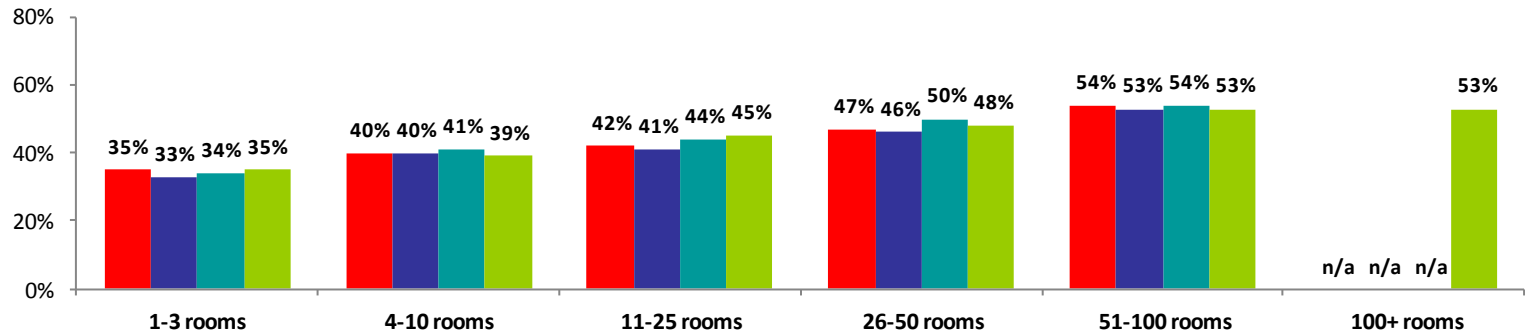
Number of Rooms

Bedspace Occupancy

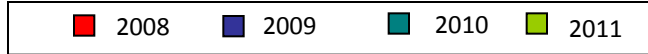
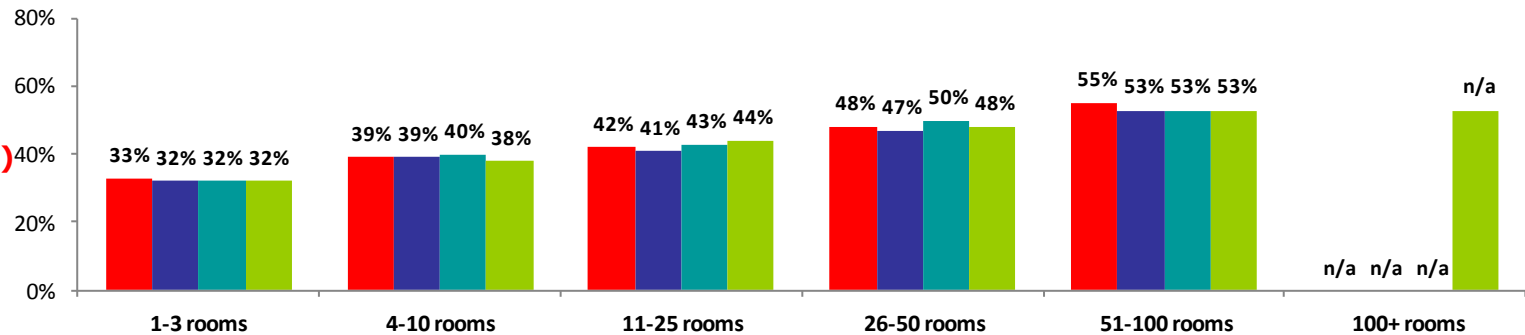
August 2011



Year to Date
(Jan 11-Aug 11)



Past 12 Mths
(Sept 10- Aug 11)



STR data is included in the year to date and past 12 months information for 2011 only