

England Occupancy Survey

December 2011 Results

Note: Change in Occupancy Reporting

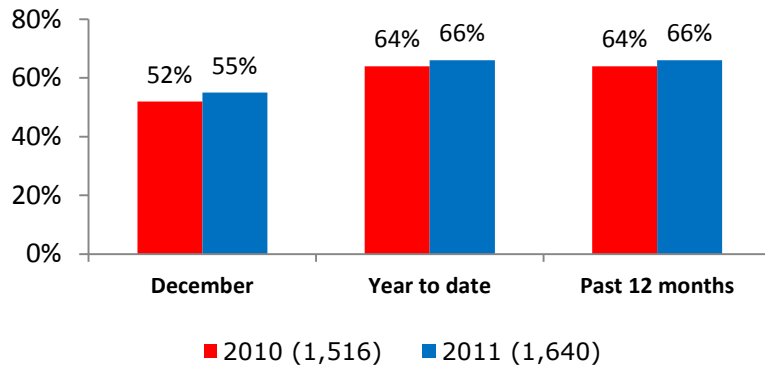
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas, business travellers vs. non business travellers).
- **From June 2011, STR data is included in the single month analysis (December) 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 December 2011 (including data from STR Global)

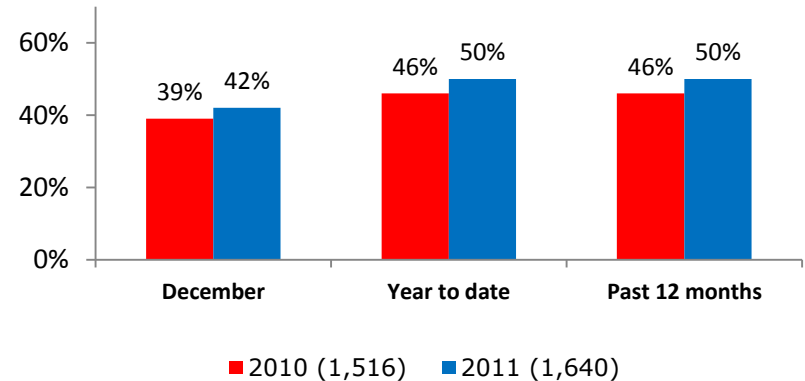
Monthly Update : December 2011

This update shows that in December, England room and bed occupancy were above those levels achieved in December 2010 as were room and bed occupancy levels for the year to date average and the past 12 months compared with same period last year.

Room Occupancy



Bedspace Occupancy

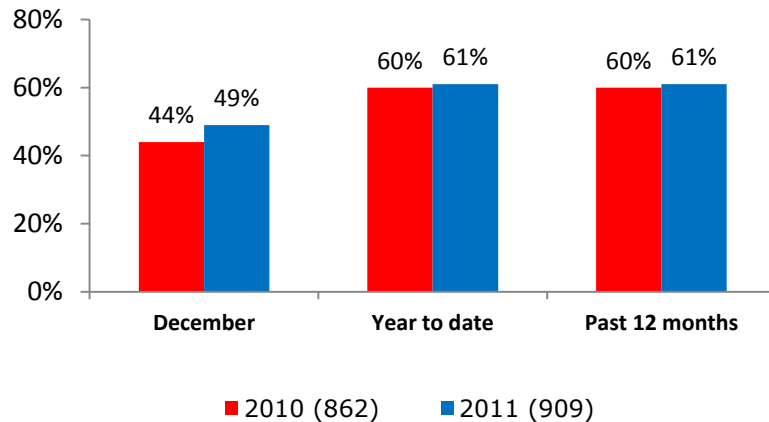


England Occupancy Reporting December 2011 (excluding data from STR Global)

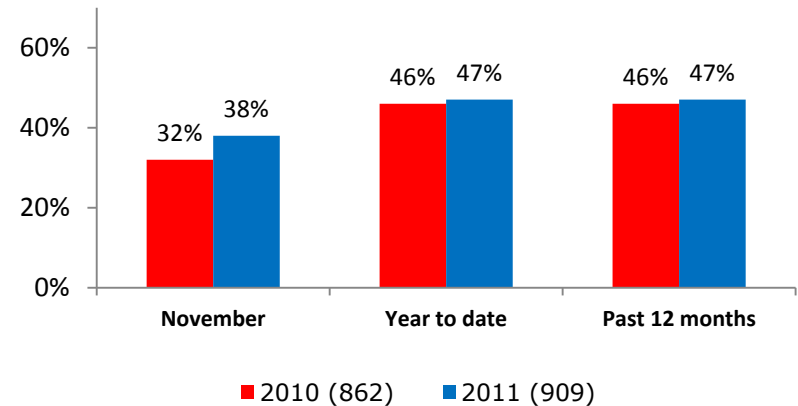
Monthly Update : December 2011

This update shows that in December 2011 both room and bed occupancy levels for England were significantly above those witnessed in December 2010. There was increase in the room and bed occupancy levels for the year to date averages, whilst room occupancy averages for the past 12 months had remained static with the same period last year, with bed occupancy for the past 12 months average witnessing a slight increase on the levels achieved in December 2010.

Room Occupancy



Bedspace Occupancy

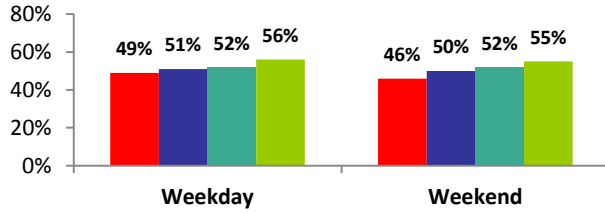


England Occupancy Reporting December 2011

- Across England as a whole, both room and bed occupancy levels during December 2011 witnessed an increase of three percentage points above the levels achieved in December 2010.
- Similarly both weekday and weekend room and bed occupancy witnessed an increase of 2 to 4 percentage points when compared with the same month the previous year. The average weekday year to date room and bed occupancy levels had also risen significantly when compared with the same period last year.
- Room and bed occupancy levels in the Bed and Breakfast category witnessed a significant increase when compared with the levels achieved in December 2010. The Hotel and guesthouse categories also witnessed an increase compared to December 2010 levels. Similarly, the average year to date and the past twelve months levels all increased on the percentages achieved in December 2010.
- Seaside, small town and countryside locations all witnessed an increase in room occupancy levels compared with the December 2010 percentages, with city/large town locations witnessing a slight decrease overall. Countryside locations witnessed the biggest increase in room occupancy levels compared with December 2010. Bed occupancy levels in seaside, small towns and countryside locations had seen an increase in levels achieved during the same period last year, with city/large town locations remaining static with the previous year.
- Room occupancy levels across all size band categories had increased compared with the December 2010 percentages. Bed occupancy levels remained static in the 11-25 size band but had increased across all other size categories, with the 51-100 size category witnessing an increase of 5 percentage points.

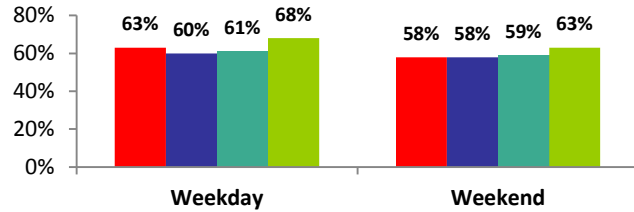
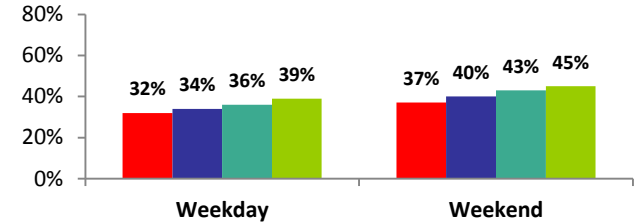
Weekday / Weekend

Room Occupancy

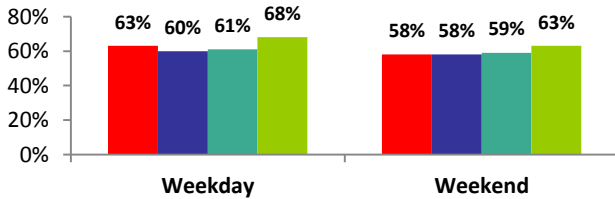
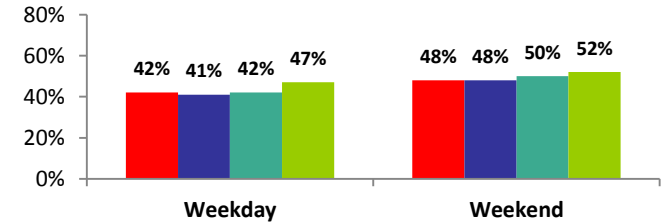


December 2011

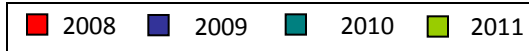
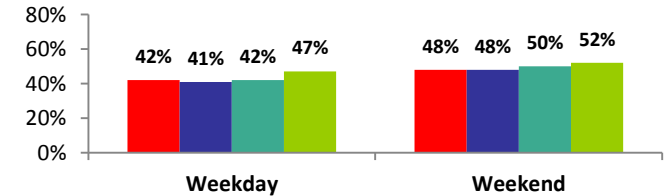
Bedspace Occupancy



Year to Date
(Jan 11 - Dec 11)

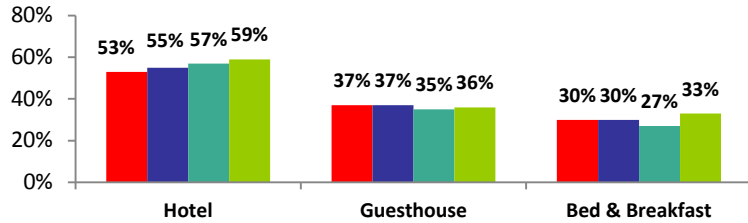


Past 12 Mths
(Jan 11 - Dec 11)



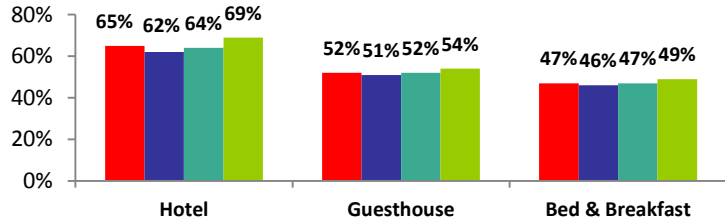
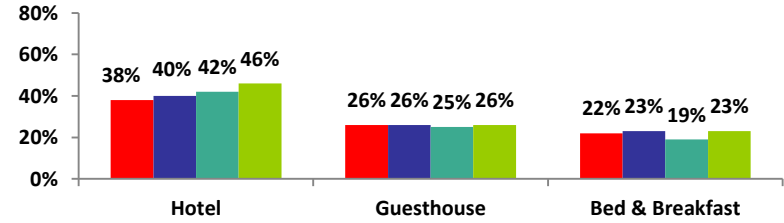
Establishment Type

Room Occupancy

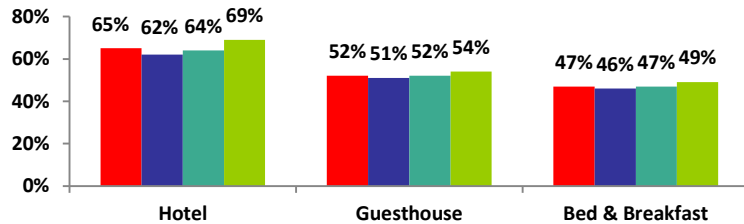
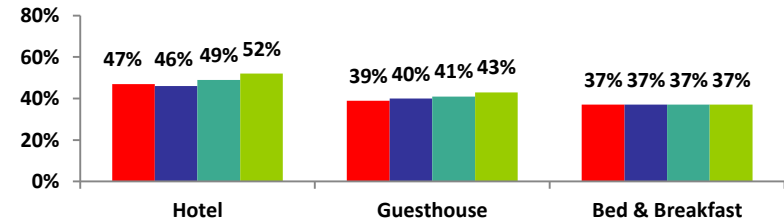


**December
2011**

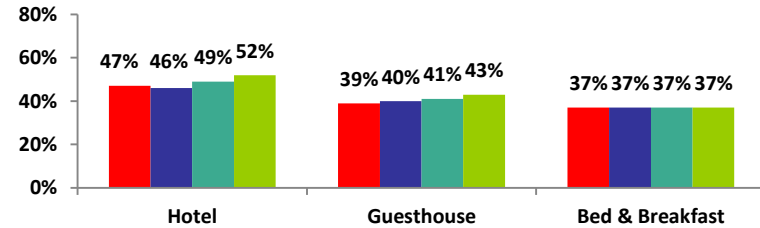
Bedspace Occupancy



**Year to Date
(Jan 11 - Dec 11)**



**Past 12 Mths
(Jan 11 - Dec 11)**



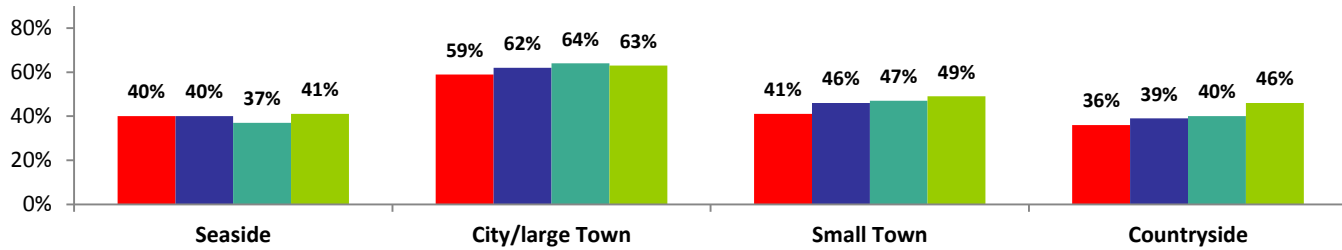
■ 2008
 ■ 2009
 ■ 2010
 ■ 2011

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

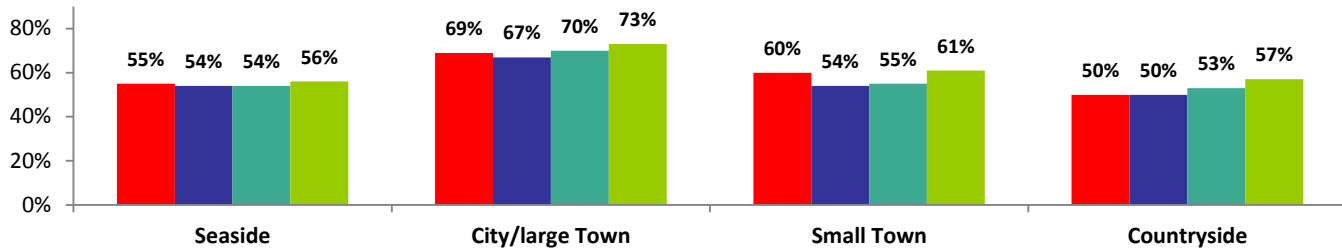
Location

Room Occupancy

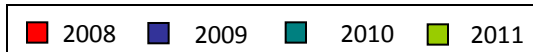
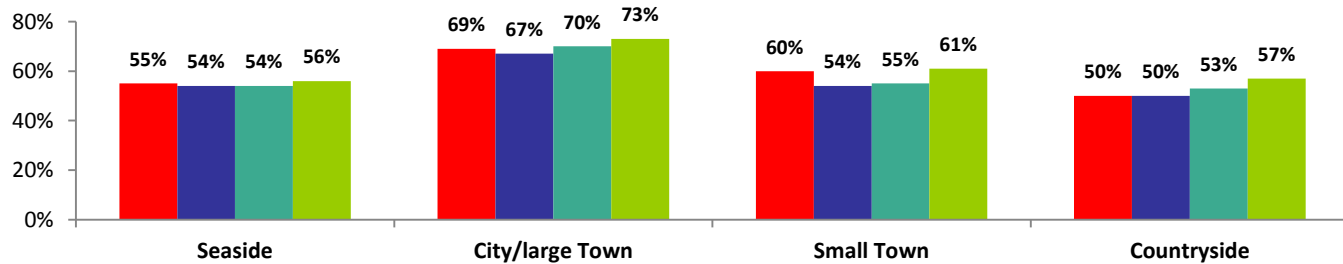
**December
2011**



**Year to Date
(Jan 11 – Dec 11)**



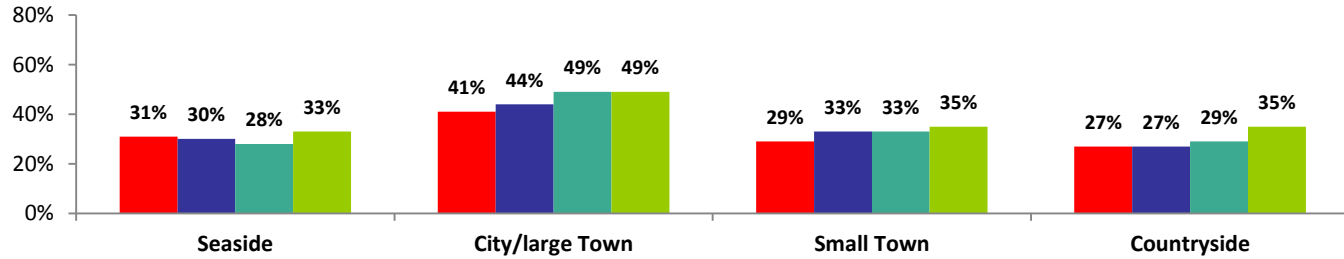
**Past 12 months
(Jan 11 – Dec 11)**



Location

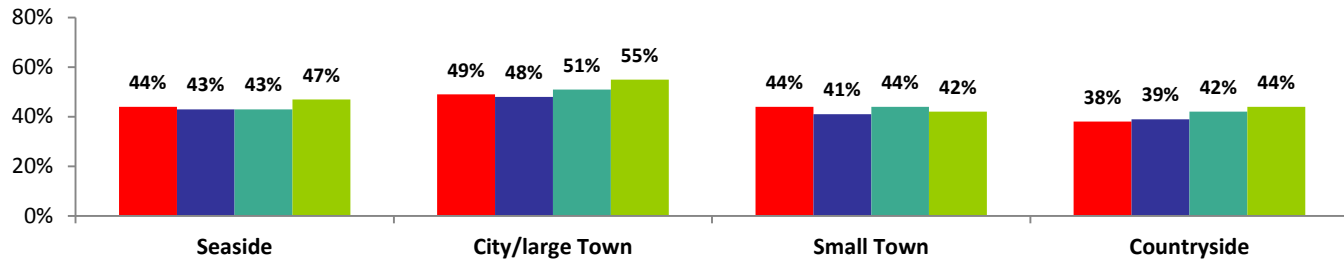
Bedspace Occupancy

**December
2011**



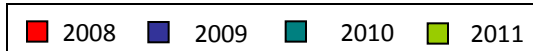
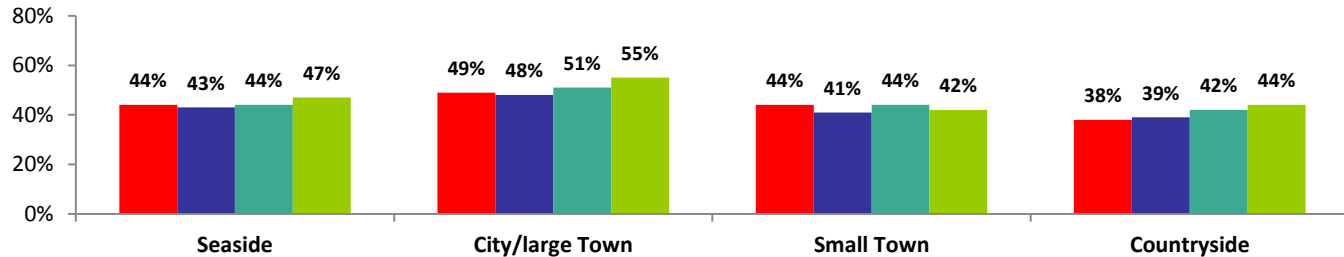
Year to Date

(Jan 11 - Dec 11)



Past 12 months

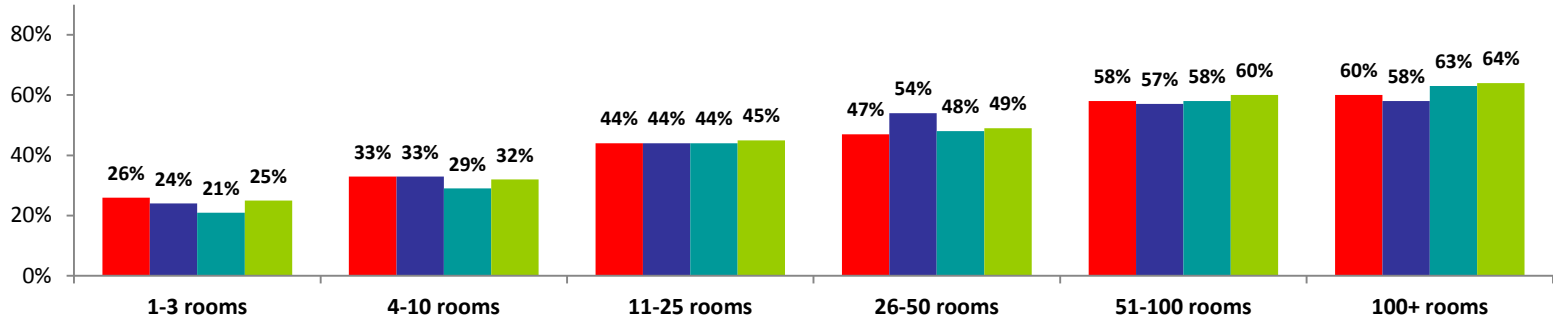
(Jan 11-Dec 11)



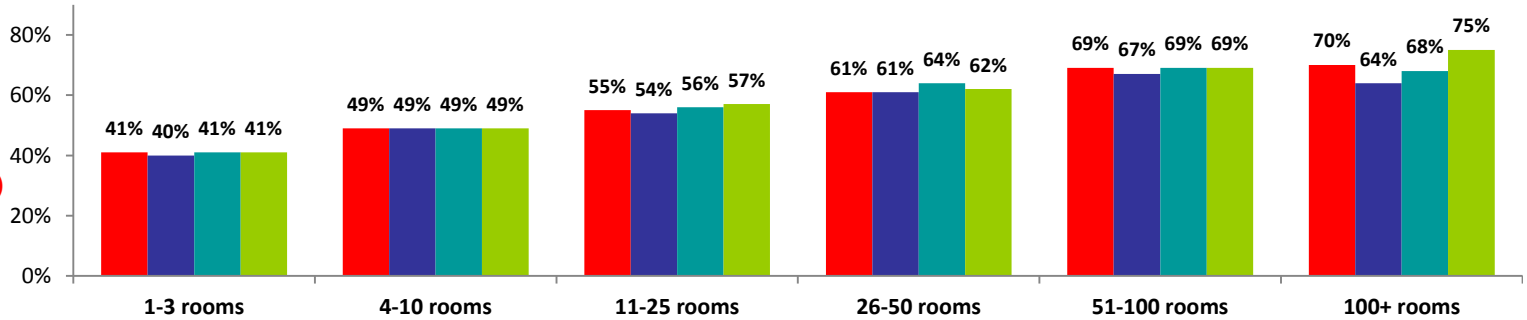
Number of Rooms

Room Occupancy

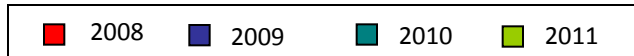
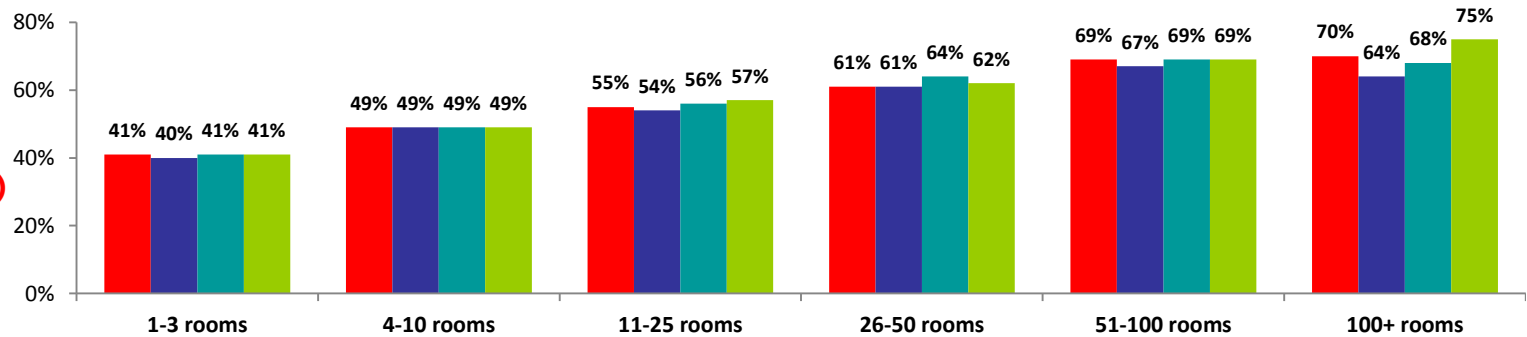
December 2011



Year to Date (Jan 11 - Dec 11)



Past 12 Mths (Jan 11 - Dec 11)

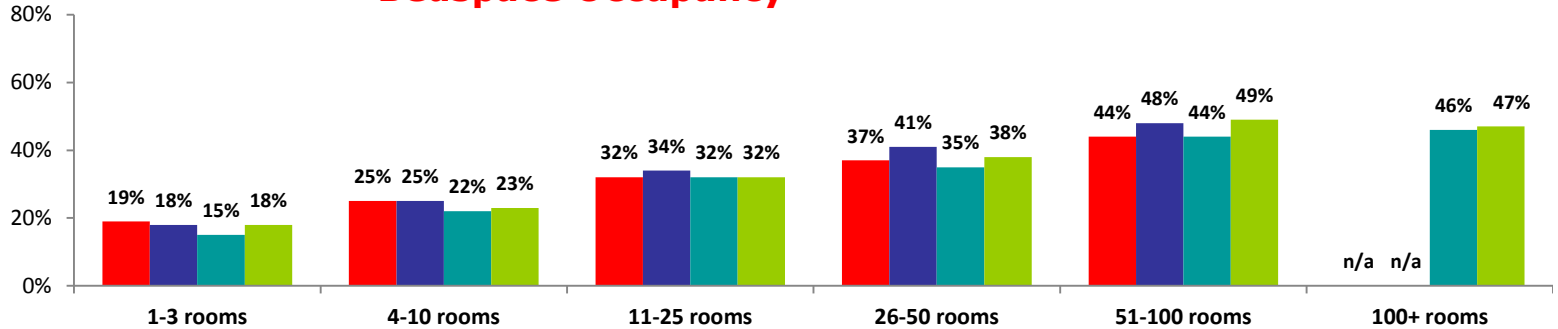


STR data is included in the year to date and past 12 months information for 2011 only

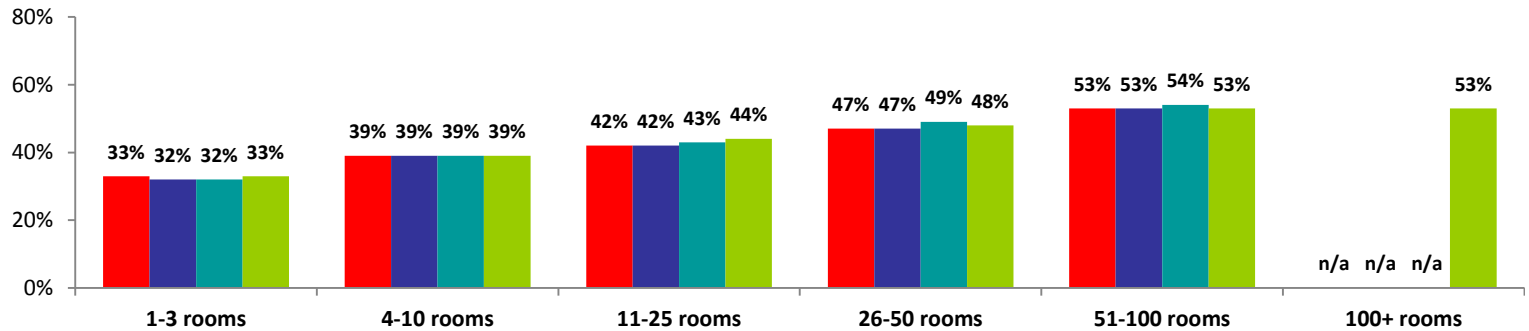
Number of Rooms

Bedspace Occupancy

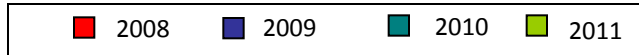
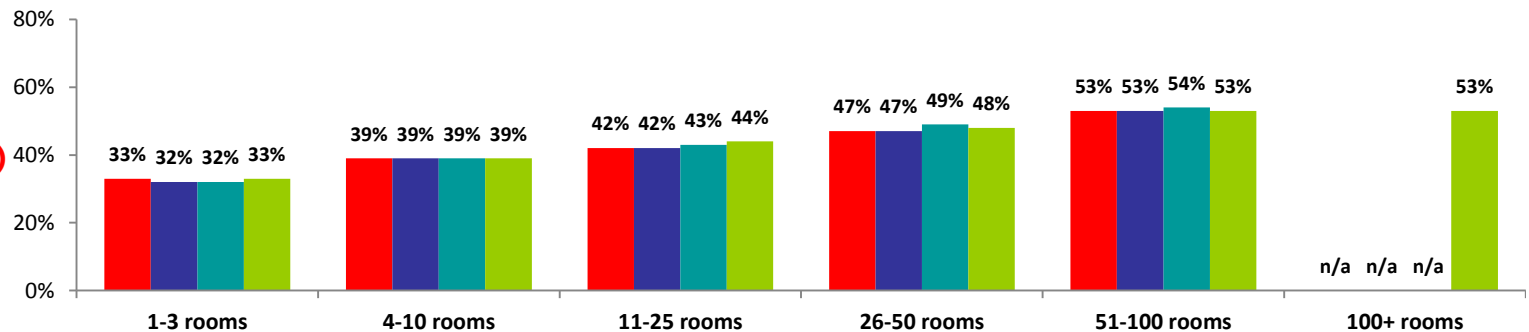
December 2011



Year to Date (Jan 11-Dec 11)



Past 12 Mths (Jan 11 - Dec 11)



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