

England Occupancy Survey

July 2011 Results

Note: Change in Occupancy Reporting

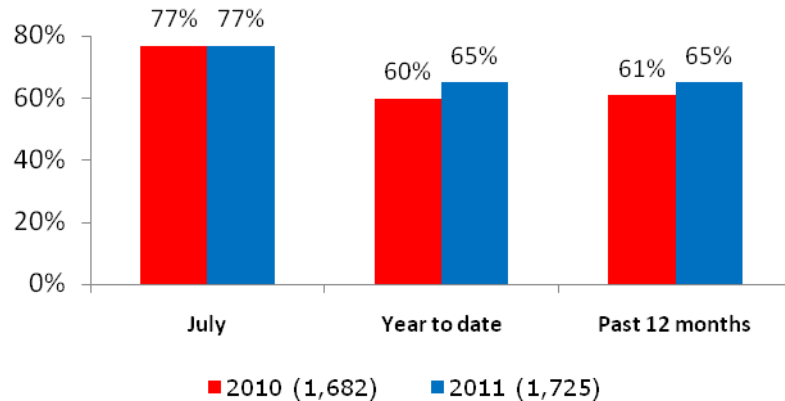
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas,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

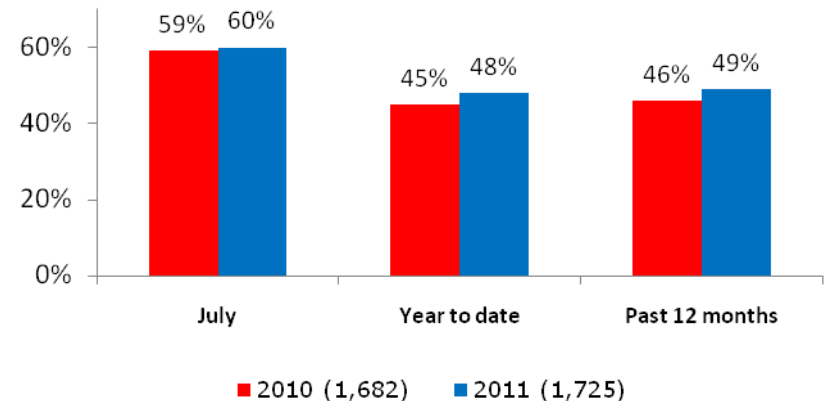
Monthly Update : July 2011

This update shows that in July 2011 England room occupancy levels remained static with the previous year and a slight increase was witnessed in bed occupancy levels compared with July 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

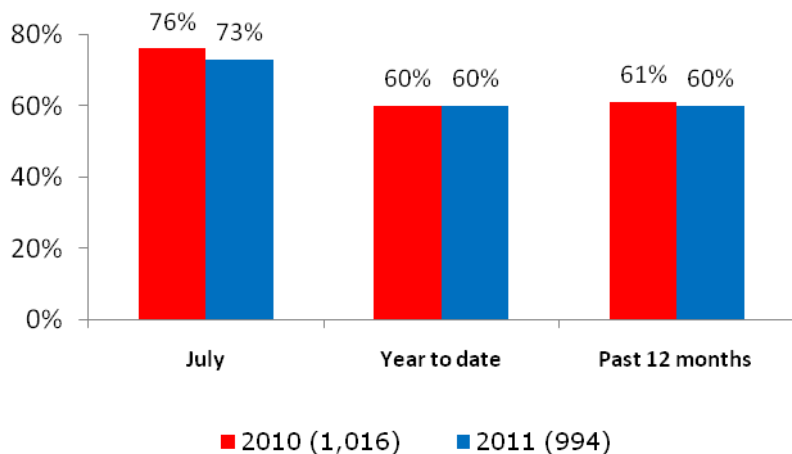


England Occupancy Reporting July 2011 (excluding data from STR Global)

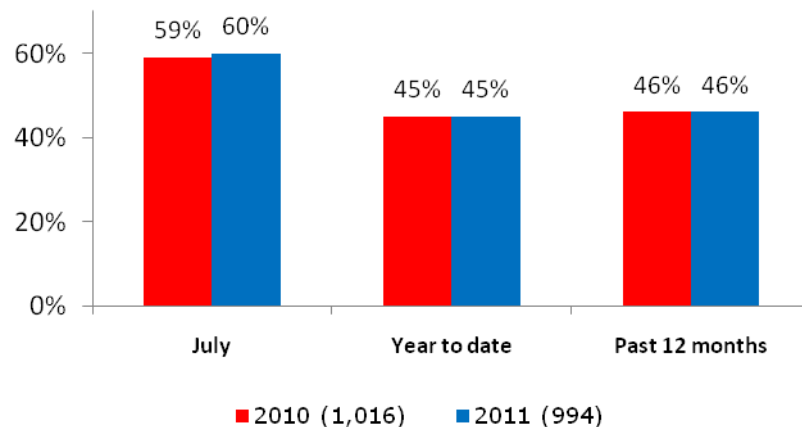
Monthly Update : July 2011

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

Room Occupancy



Bedspace Occupancy



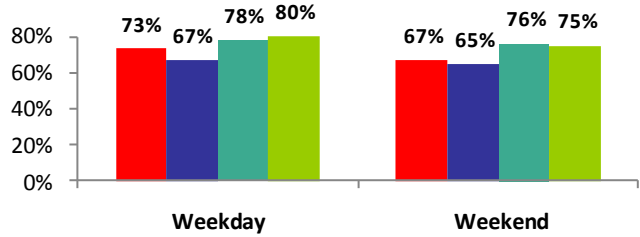
England Occupancy Reporting

July 2011

- Across England as a whole, room occupancy remained static with the levels achieved in July 2010 and bed occupancy levels witnessed a slight increase compared with the same period last year.
- Weekday room occupancy levels in July 2011 were above the July 2010 levels, with bedspace occupancy remaining static with the previous year. Weekend room occupancy witnessed a slight decrease on the 2010 levels, with the bed occupancy levels remaining static with July 2010.
- Room occupancy levels in the guest house and B&B sectors in July 2011 had increased slightly on the previous year, with hotel room occupancy witnessing a slight decrease compared with July 2010. Bed occupancy levels in the hotel and guesthouse sectors increased slightly on the levels achieved in July 2010, with B&Bs witnessing a slight decrease in bed occupancy.
- Small town and Countryside locations witnessed an increase in room occupancy levels compared with July 2010, with seaside locations remaining static and city/large towns decreasing slightly compared with July 2010 levels. Bed occupancy levels across all categories increased or remained static with July 2010.
- Room occupancy levels across all size bands had increased or remained static with July 2010 percentages. Bed occupancy levels in the 1-3 and 51-100 size bands had witnessed a slightly increase on July 2010 levels, the 11-25 levels remained static with the previous year and the 4-10, 26-50 and 100+ size bandings witnessed a slight decrease compared with the July 2010 levels.

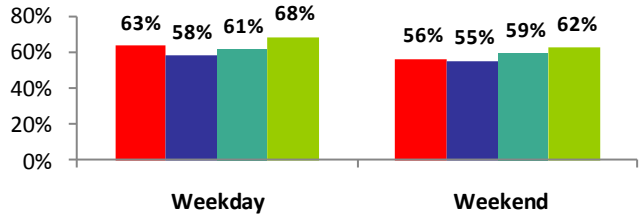
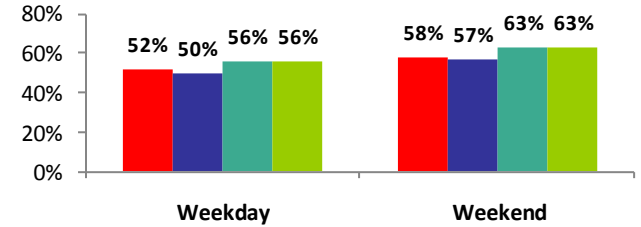
Weekday / Weekend

Room Occupancy

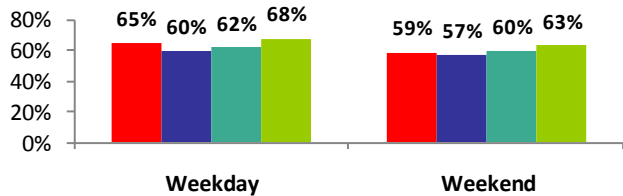
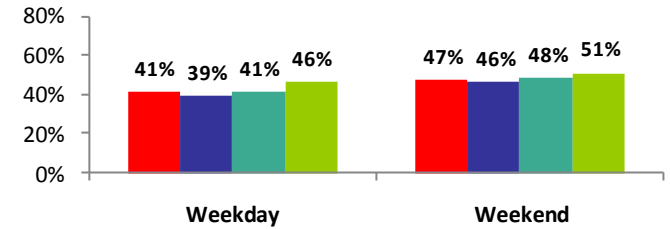


July 2011

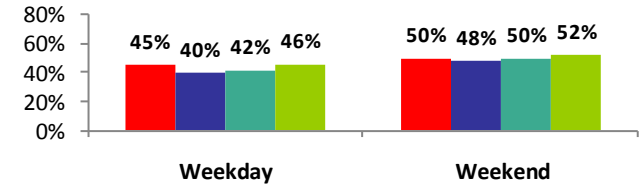
Bedspace Occupancy



Year to Date
(Jan 11 - Jul 11)

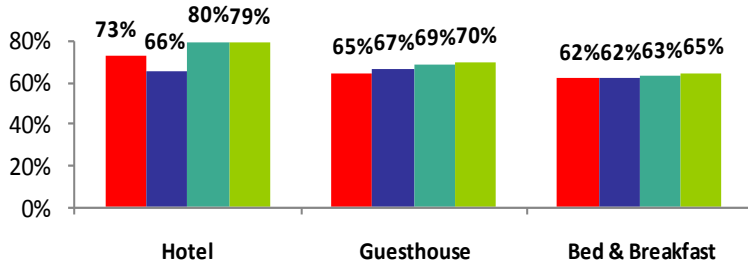


Past 12 Mths
(Aug 10 - Jul 11)



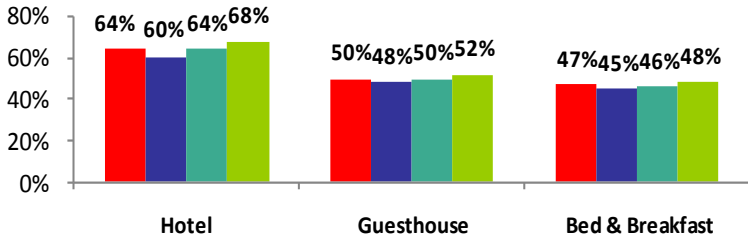
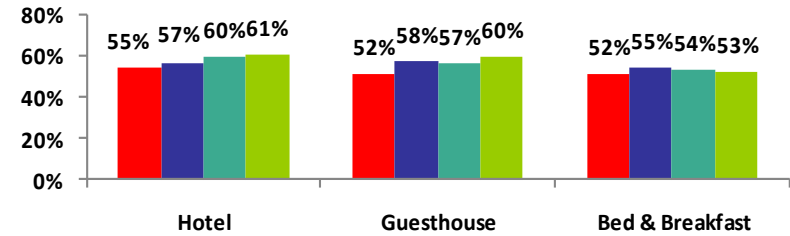
Establishment Type

Room Occupancy

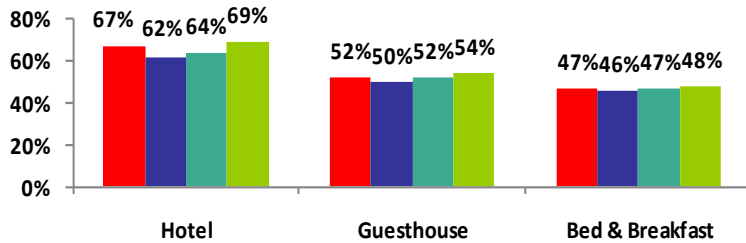
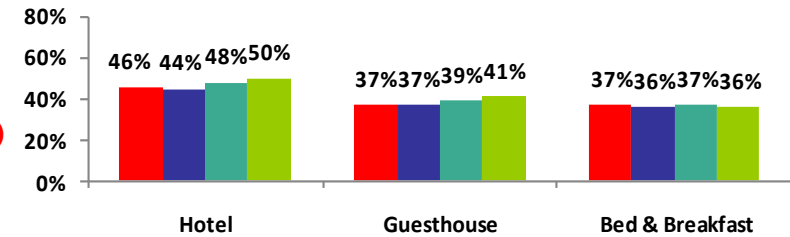


July 2011

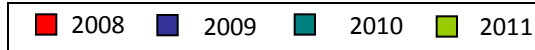
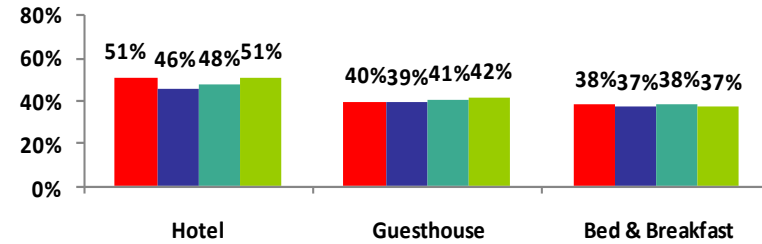
Bedspace Occupancy



Year to Date
(Jan 11 - Jul 11)



Past 12 Mths
(Aug 10 - Jul 11)

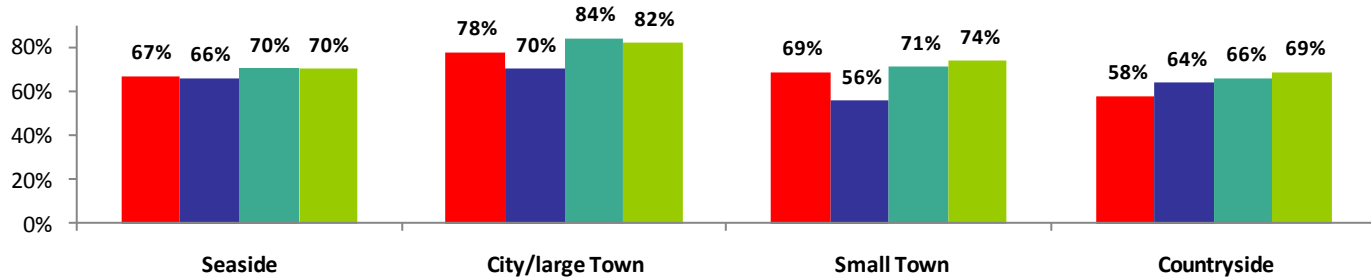


STR data is included in the year to date and past 12 months information for 2011 – for the Hotel sector only

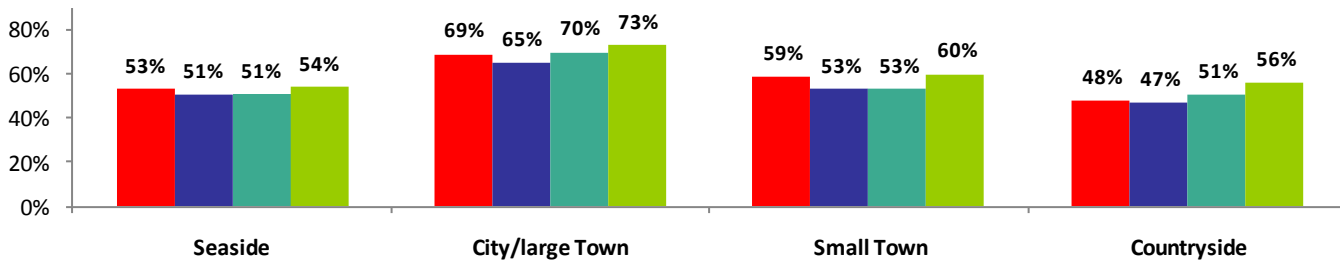
Location

Room Occupancy

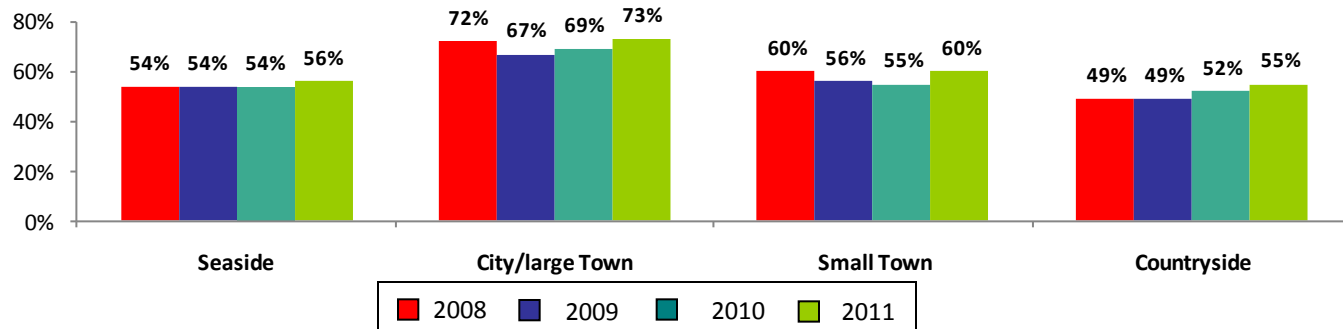
July 2011



Year to Date
(Jan 11 - Jul 11)



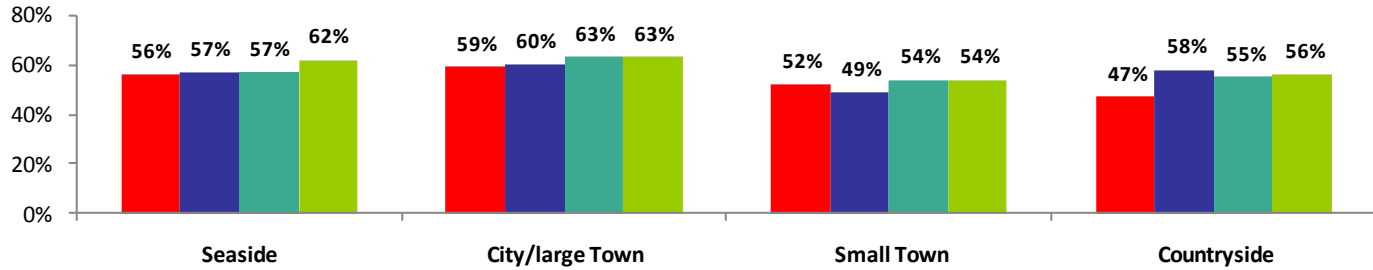
Past 12 months
(Aug 10- Jul 11)



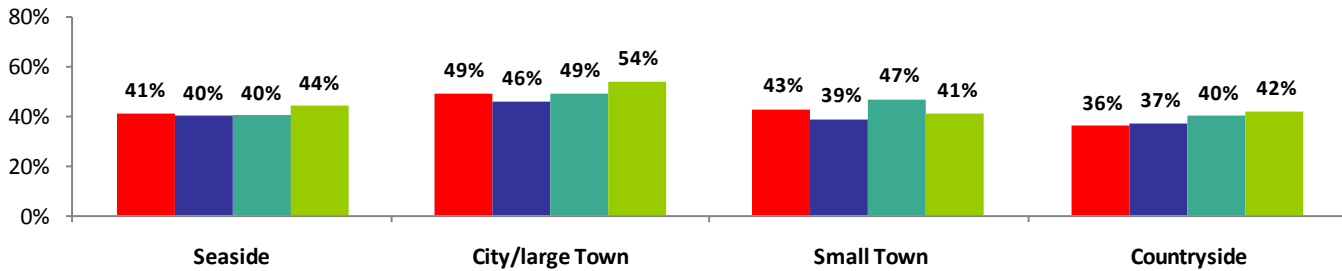
Location

Bedspace Occupancy

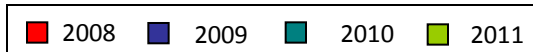
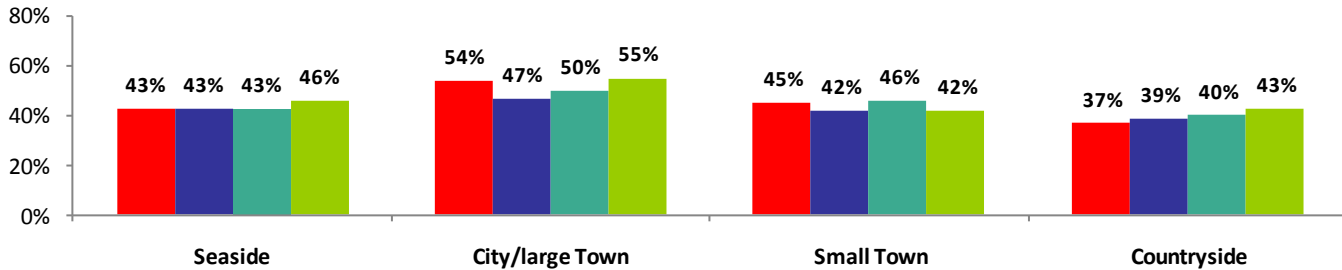
July 2011



Year to Date
(Jan 11 - Jul 11)



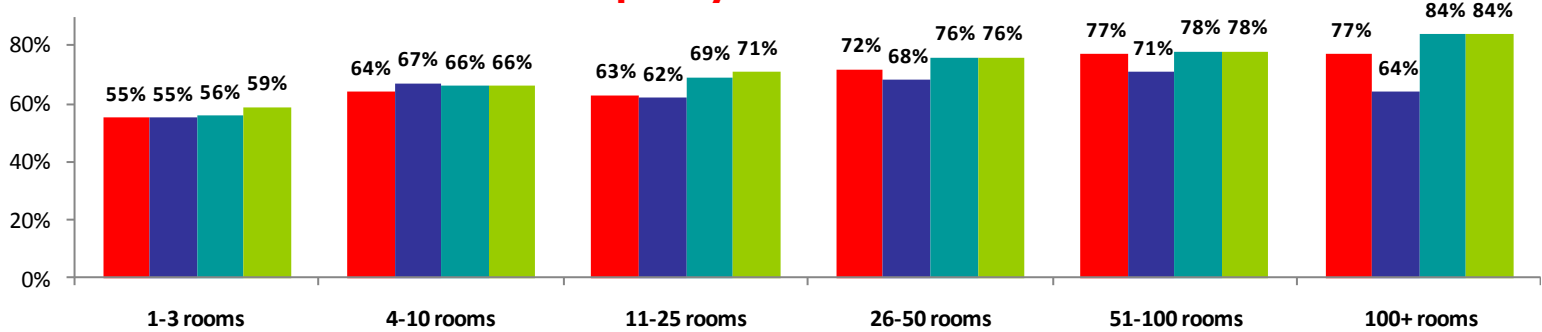
Past 12 months
(Aug 10- Jul 11)



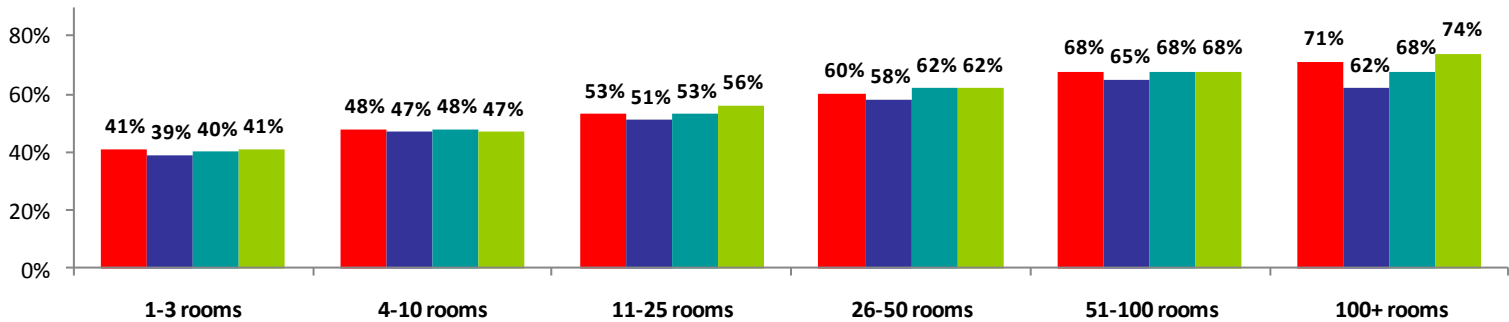
Number of Rooms

Room Occupancy

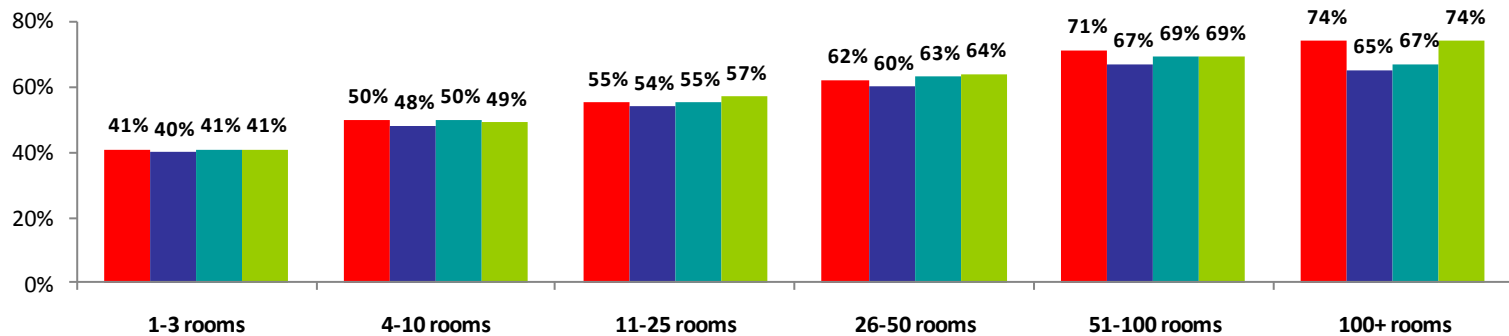
July 2011



Year to Date
(Jan 11 - Jul 11)



Past 12 Mths
(Aug 10 - Jul 11)

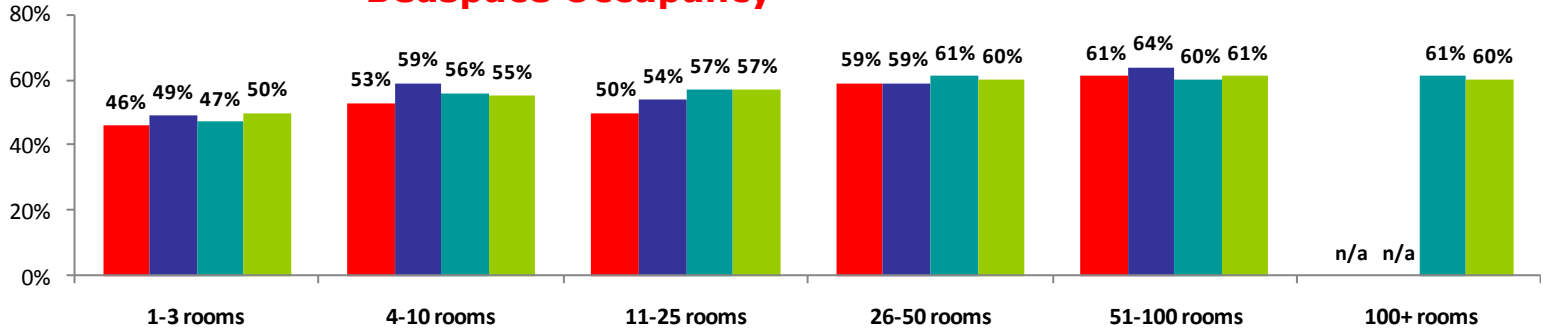


STR data is included in the year to date and past 12 months information for 2011 only

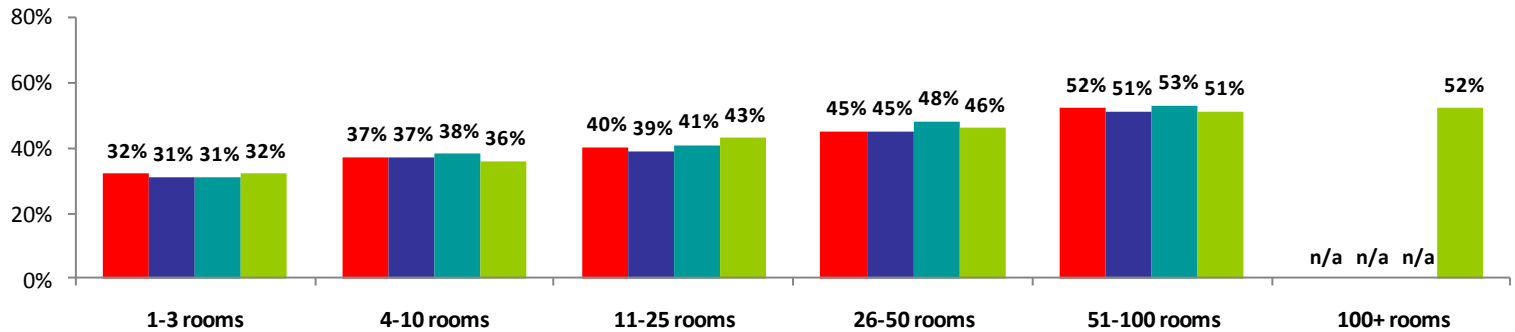
Number of Rooms

Bedspace Occupancy

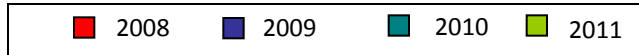
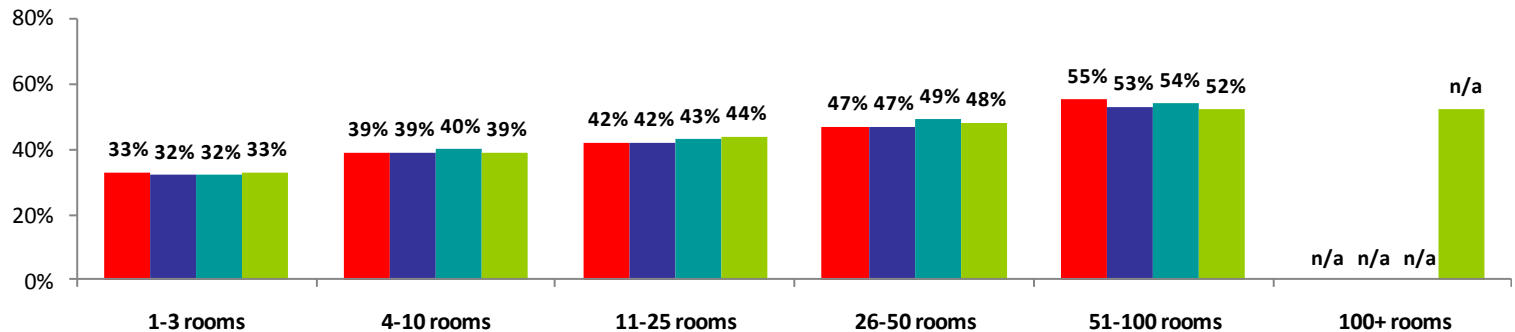
July 2011



Year to Date
(Jan 11-Jul 11)



Past 12 Mths
(Aug 10-Jul 11)



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