

England Occupancy Survey

June 2011 Results

Note: Change in Occupancy Reporting

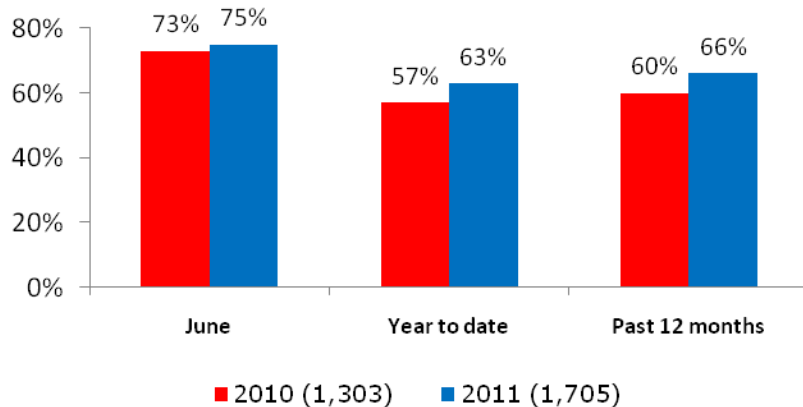
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas,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

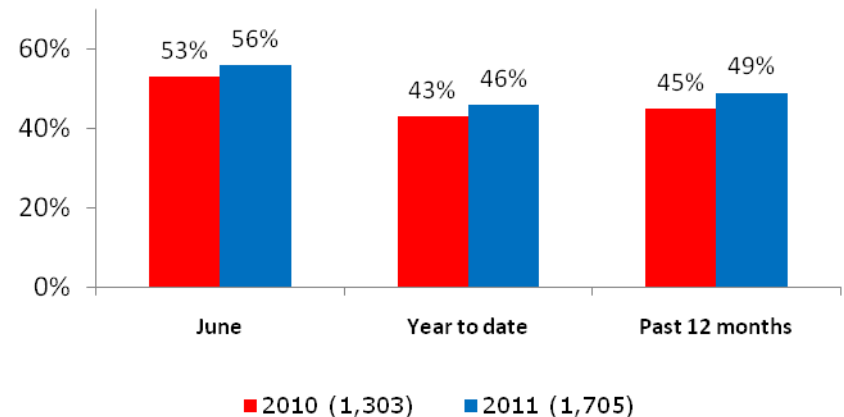
Monthly Update : June 2011

This update shows that in June 2011 England witnessed a slight increase in both room and bed occupancy levels compared with June 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

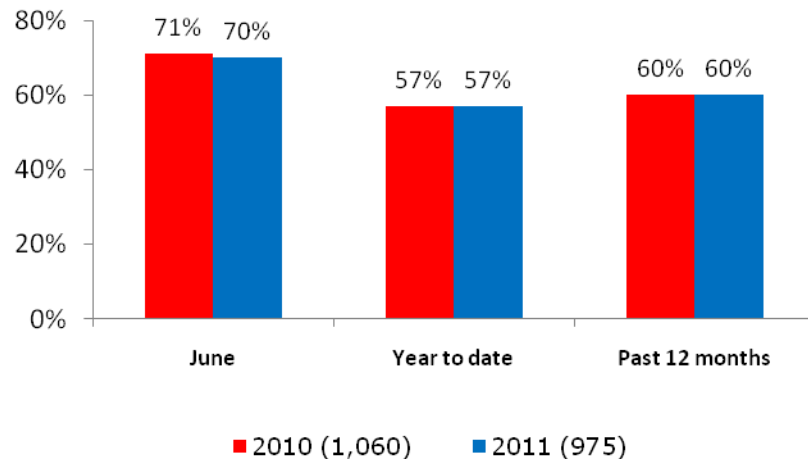


England Occupancy Reporting June 2011 (excluding data from STR Global)

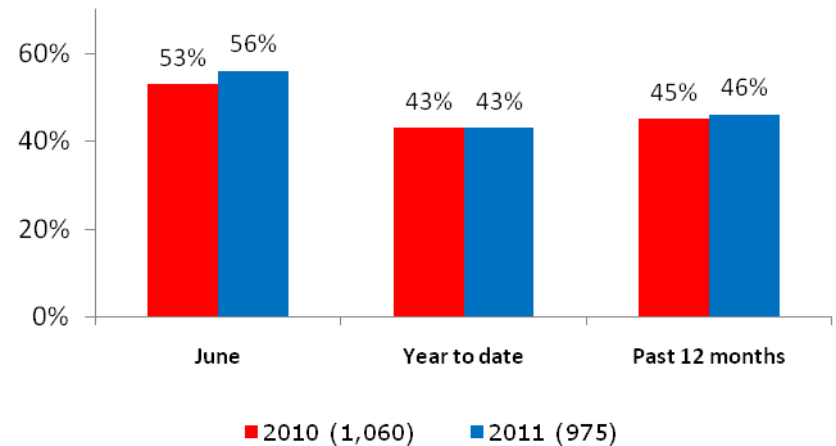
Monthly Update : June 2011

This update shows that in June 2011 England witnessed a slight decrease in room occupancy levels compared with June 2010, with bed occupancy levels increasing 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 room occupancy levels for the past 12 months. Bed occupancy for the past 12 months average witnessed a slight increase on the previous levels achieved.

Room Occupancy



Bedspace Occupancy

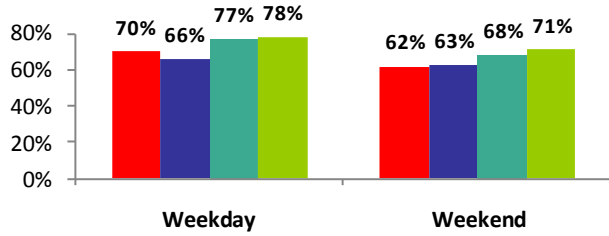


England Occupancy Reporting June 2011

- Across England as a whole, both room and bed occupancy levels were above those achieved during June 2010.
- Weekday and weekend room and bed occupancy levels in June 2011 were above the June 2010 percentages and were at the highest levels across the last 4 years.
- Room and bed occupancy levels across all sectors in June 2011 have increased or remained on a par with the levels achieved during June 2010, with the exception of the B&B category which witnessed a slight decrease in bed occupancy compared with the June 2010 percentage.
- All locations witnessed an increase in both room and bed occupancy levels compared with June 2010, with the exception of small town locations which had decreased slightly.
- Room occupancy levels across all size bands had increased or remained static with June 2010 percentages. Bed occupancy levels were mixed with increases witnessed in the 1-3, 51-100 and 100+ categories and decreases in the 4-10 and 26-50 categories. The 11-25 size band remained static with the previous year

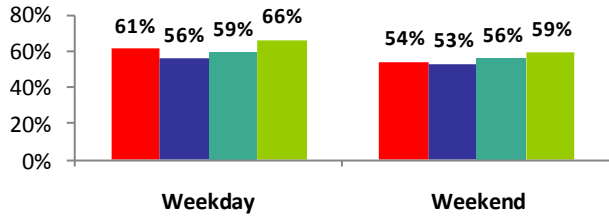
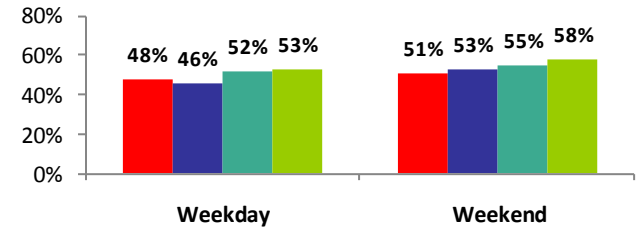
Weekday / Weekend

Room Occupancy

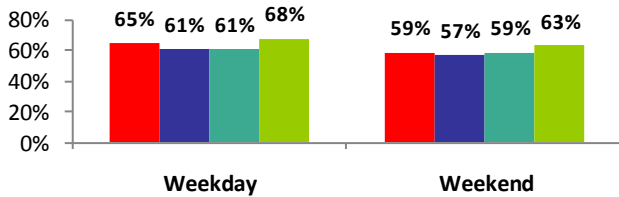
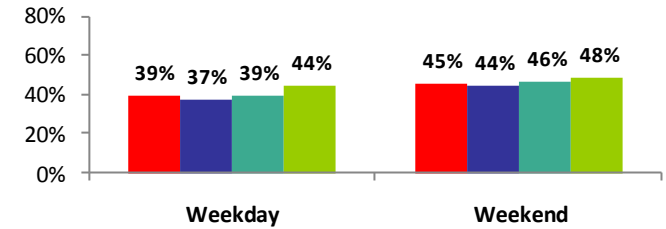


June 2011

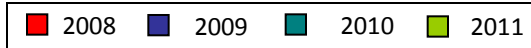
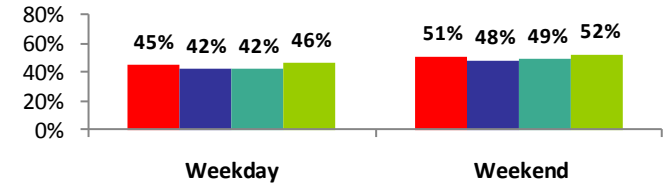
Bedspace Occupancy



Year to Date
(Jan 11 - Jun 11)

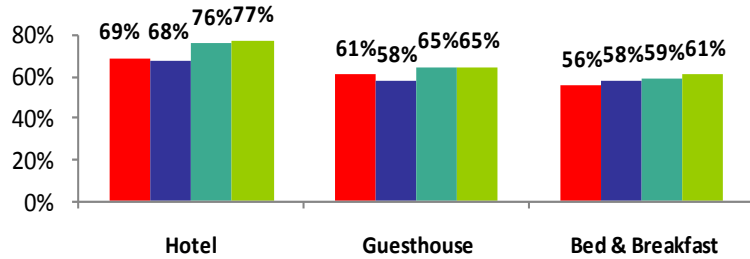


Past 12 Mths
(Jul 10 - Jun 11)



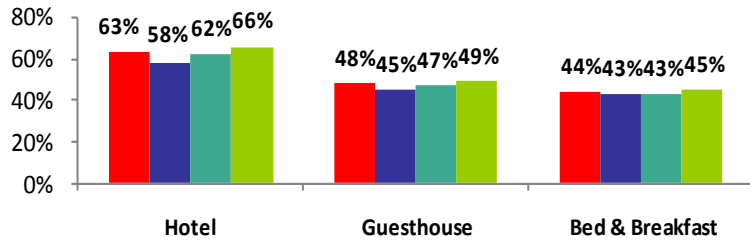
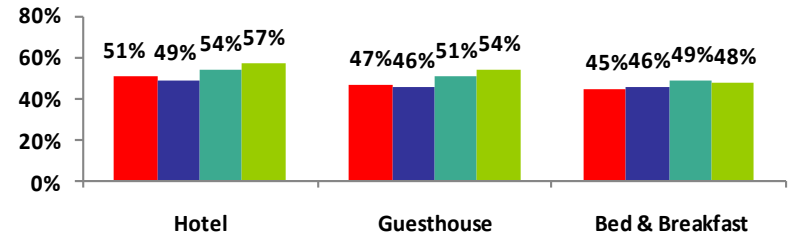
Establishment Type

Room Occupancy

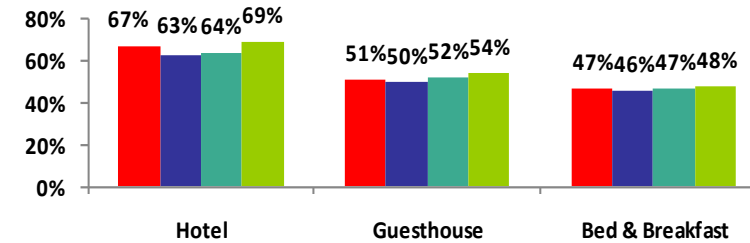
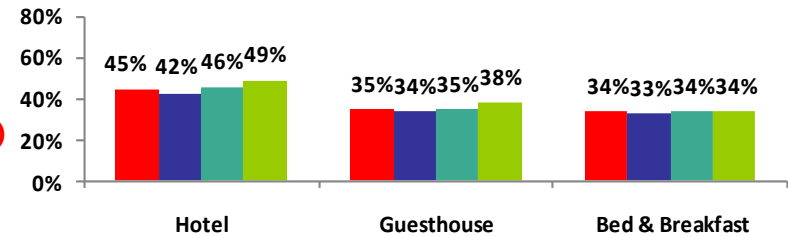


June 2011

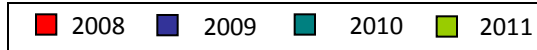
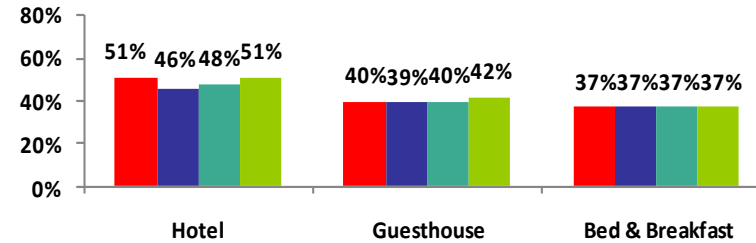
Bedspace Occupancy



Year to Date
(Jan 11 - Jun 11)



Past 12 Mths
(Jul 10 - Jun 11)

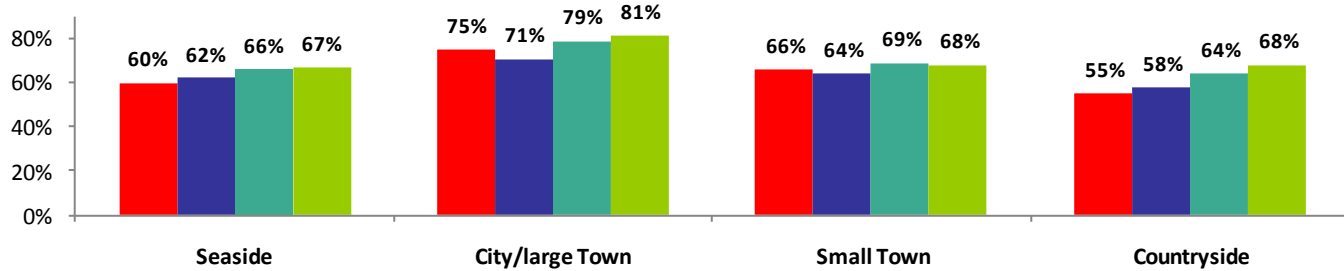


STR data is included in the year to date and past 12 months information for 2011 – for the Hotel sector only

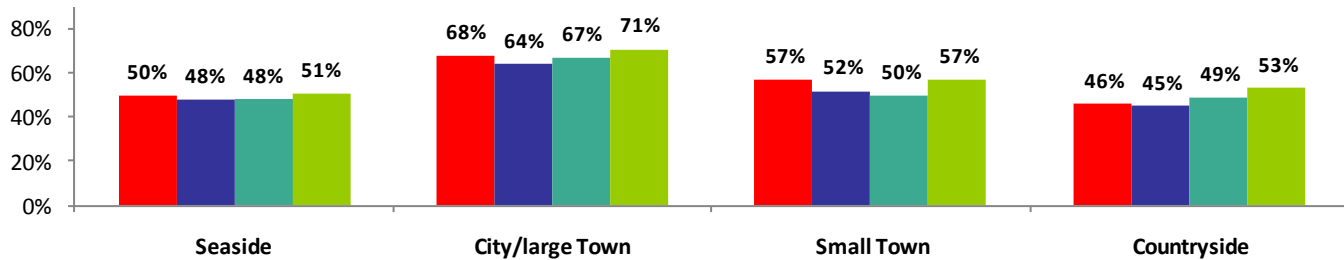
Location

Room Occupancy

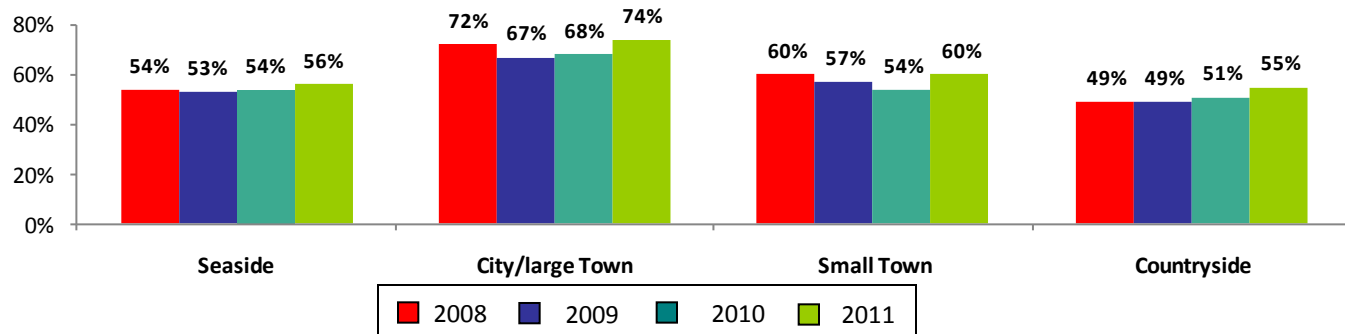
June 2011



Year to Date
(Jan 11 - Jun 11)



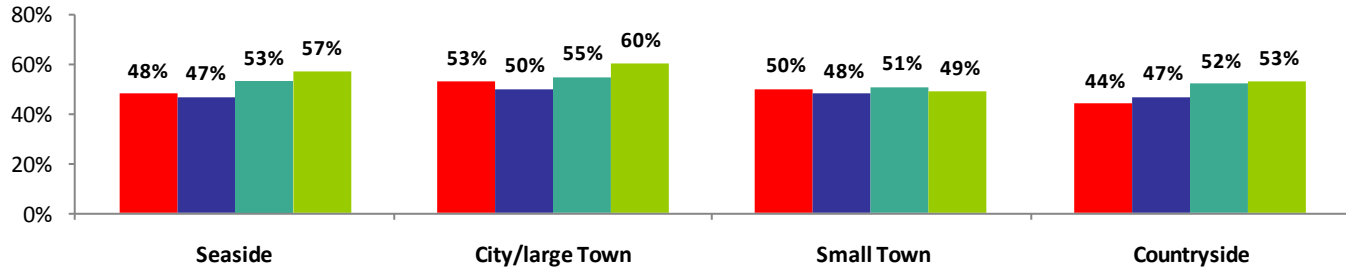
Past 12 months
(Jul 10 - Jun 11)



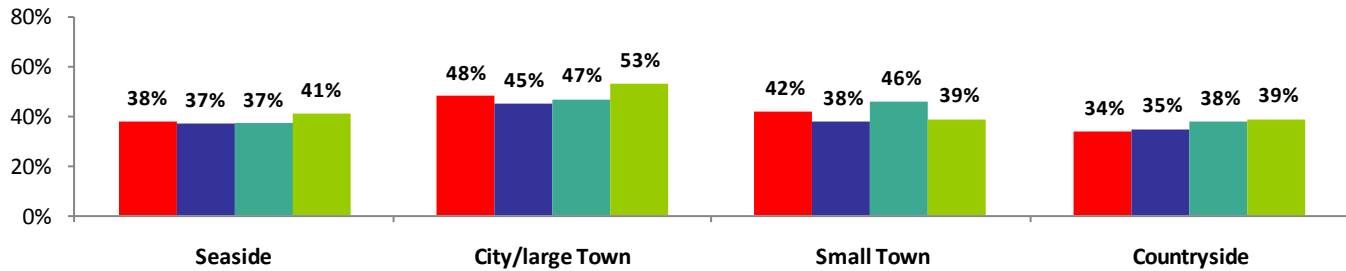
Location

Bedspace Occupancy

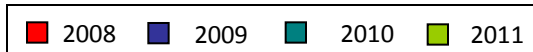
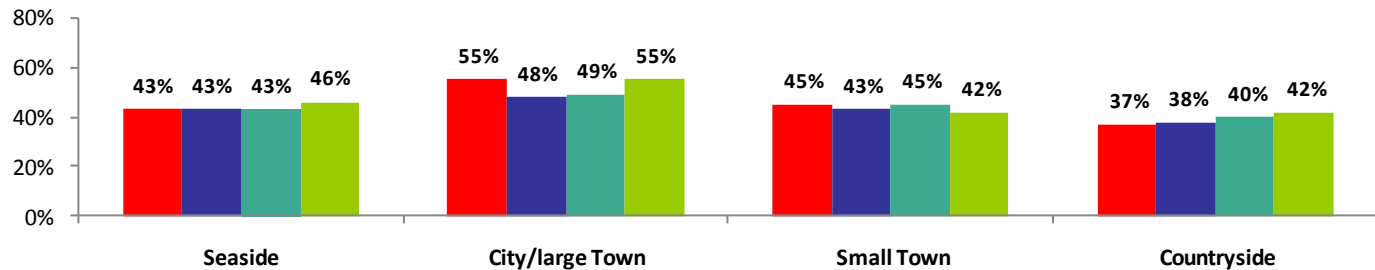
June 2011



Year to Date
(Jan 11 - Jun 11)



Past 12 months
(Jul 10 - Jun 11)

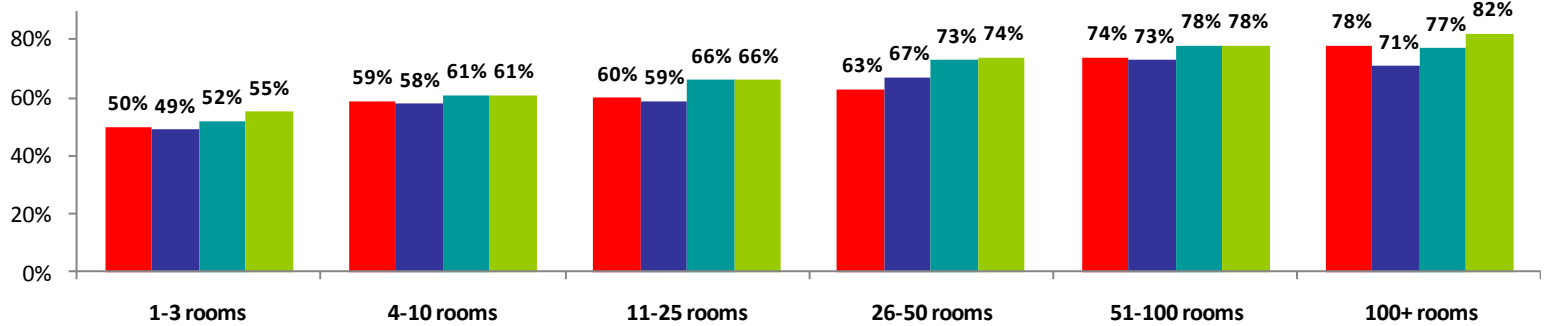


STR data is included in the year to date and past 12 months information for 2011 only

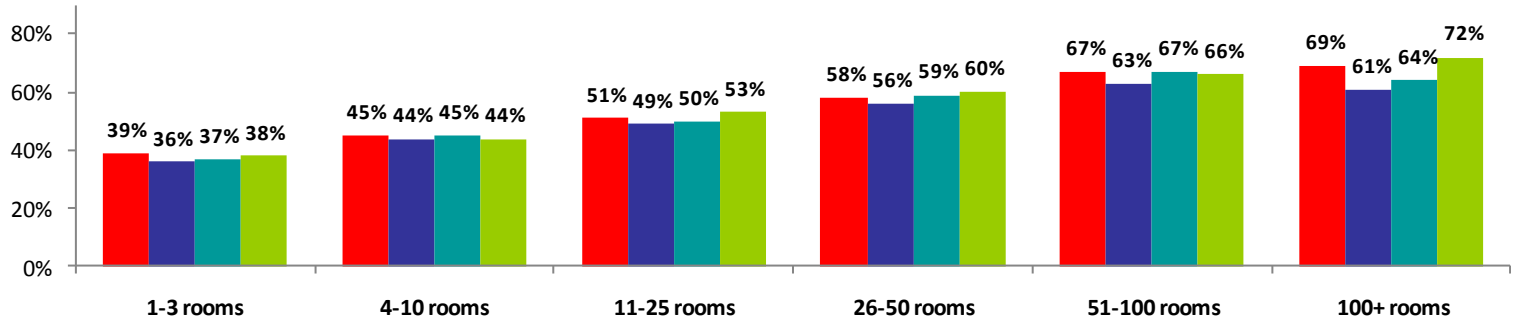
Number of Rooms

Room Occupancy

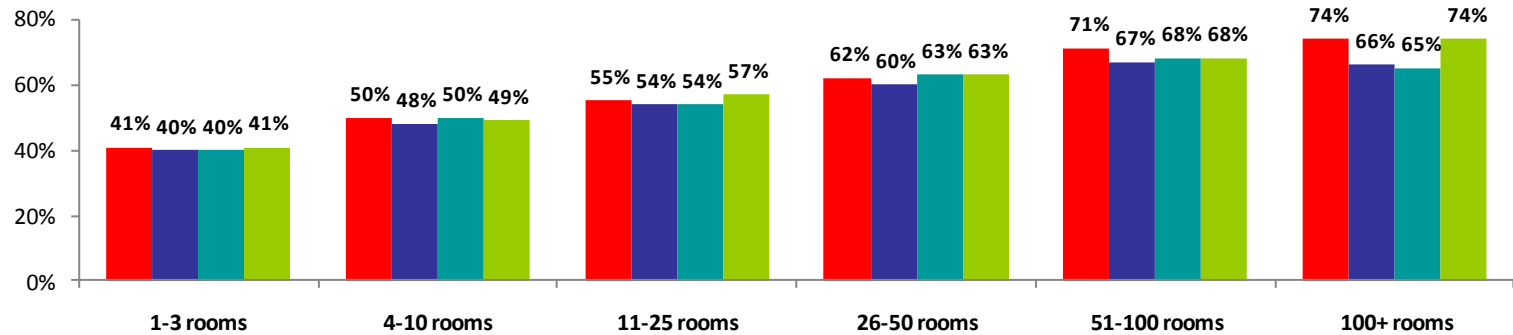
June 2011



Year to Date
(Jan 11 - Jun 11)



Past 12 Mths
(Jul 10 - Jun 11)

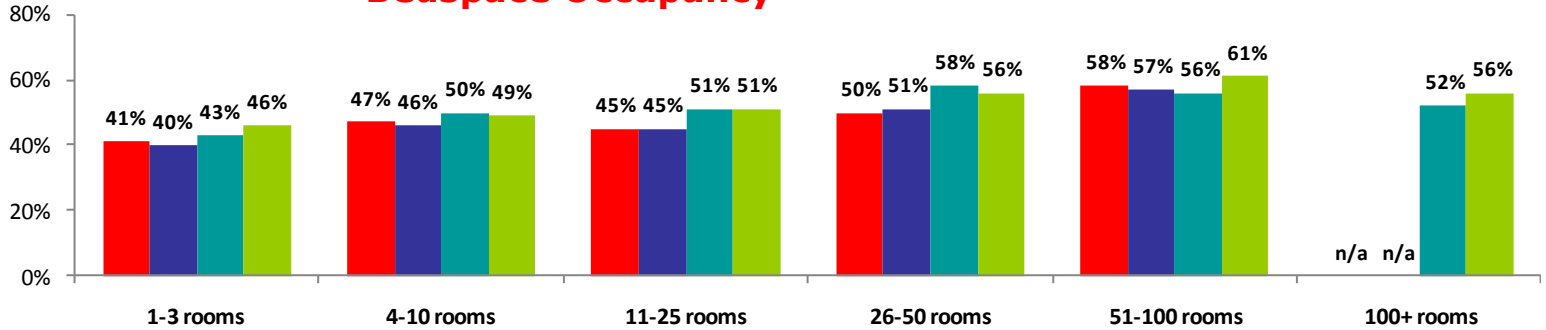


STR data is included in the year to date and past 12 months information for 2011 only

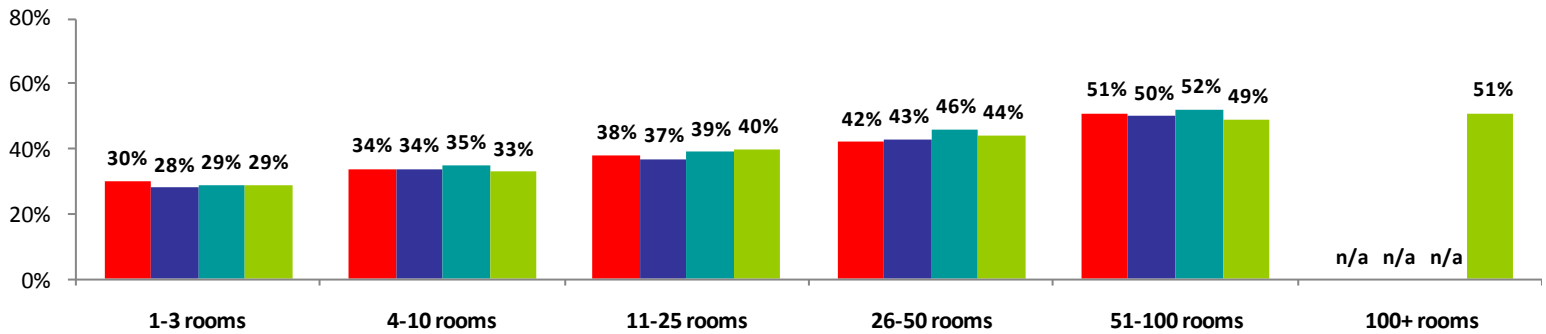
Number of Rooms

Bedspace Occupancy

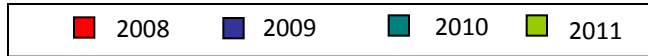
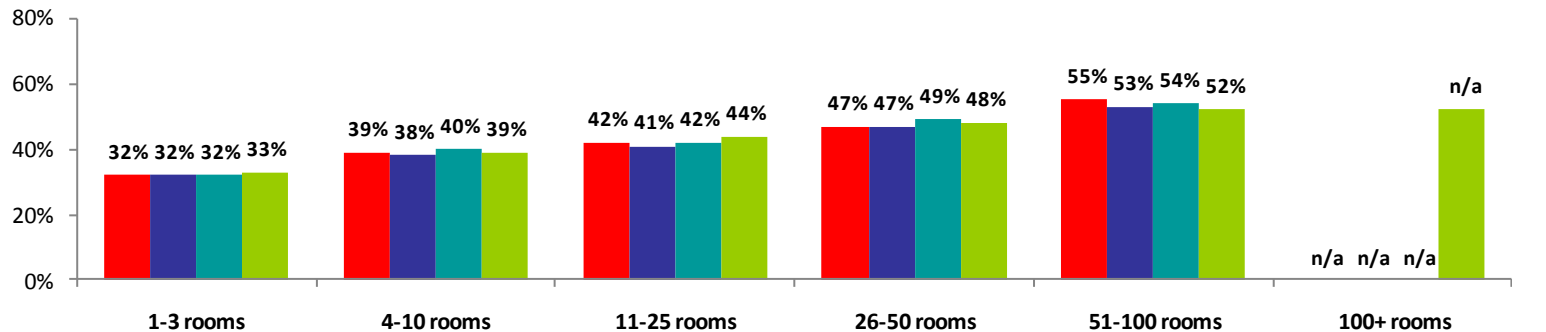
June 2011



Year to Date
(Jan 11-Jun 11)



Past 12 Mths
(Jul 10-Jun 11)



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