

England Occupancy Survey

September 2011 Results

Note: Change in Occupancy Reporting

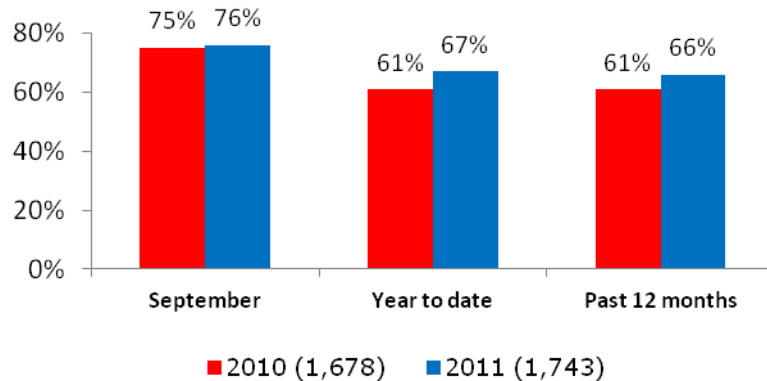
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas,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

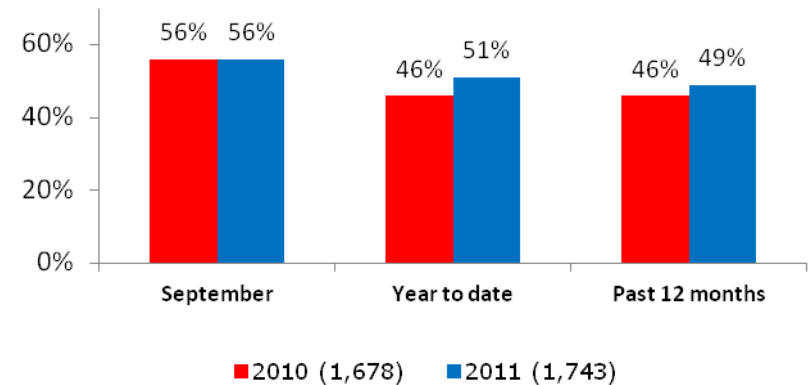
Monthly Update : September 2011

This update shows that in September England room occupancy levels were slightly above the level achieved in September 2010, whilst bed occupancy levels remained static with the previous year. 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

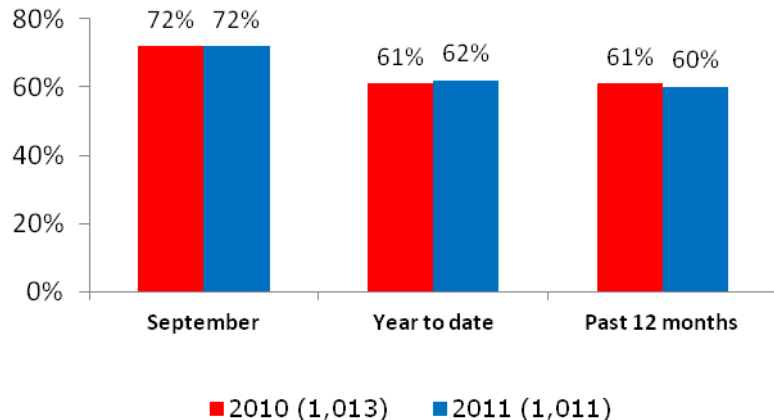


England Occupancy Reporting September 2011 (excluding data from STR Global)

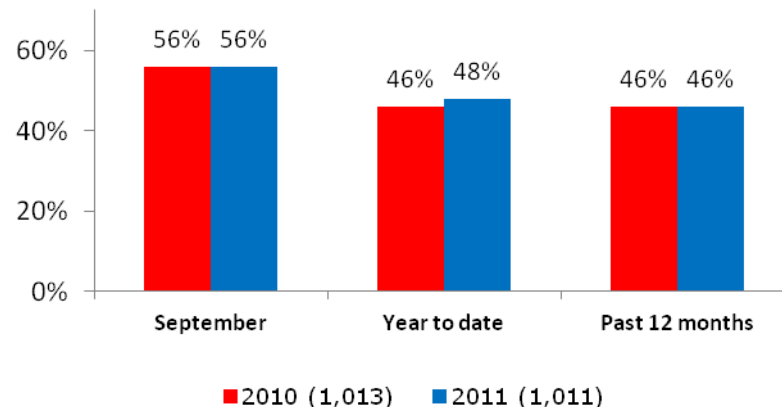
Monthly Update : September 2011

This update shows that in September 2011 both room and bed occupancy levels for England were on a par with the levels witnessed in September 2010. Room and bed occupancy levels for the year to date averages 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 September 2010, with bed occupancy levels remaining static with September 2010 levels.

Room Occupancy



Bedspace Occupancy

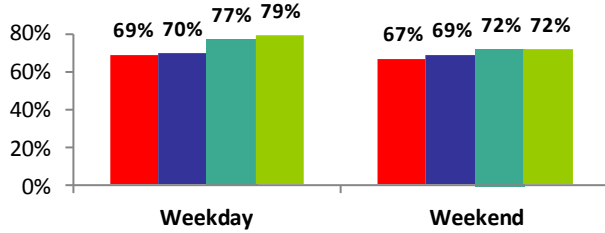


England Occupancy Reporting September 2011

- Across England as a whole, room occupancy witnessed a slight increase compared with the levels achieved in September 2010, whilst bed occupancy levels remained static with the previous year.
- Weekday room and bed occupancy levels during September 2011 were slightly above the September 2010 levels. Weekend room occupancy was on a par with the levels witnessed during the same period last year with bed occupancy levels slightly below those achieved in September 2010.
- Room and bed occupancy levels in the Guesthouse and B&B categories in September 2011 had increased slightly on the levels achieved during the same period last year. Hotel room occupancy levels remained static with the levels achieved during September 2010 whilst bed occupancy levels witnessed a slight decrease on levels achieved during September 2010.
- Small town and Countryside locations witnessed a slight increase in room occupancy levels compared with September 2010, with levels in seaside locations and city/large towns decreasing slightly. Bed occupancy levels in small town locations also increased on the levels achieved during September 2010, with countryside locations remaining static with the levels achieved during the same period last year. Seaside and city/large town locations witnessed a decrease in bed occupancy levels compared with the September 2010 levels.
- Room occupancy levels in the 4-10, 11-25 and 100+ size bands had increased compared with September 2010 percentages and levels remained static in the 51-100 category. Bed occupancy levels increased in the 4-10 and 100+ size bands and remained static in the 11-25 size band.

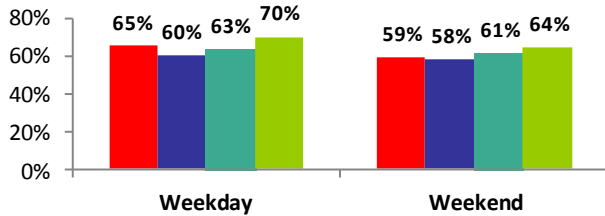
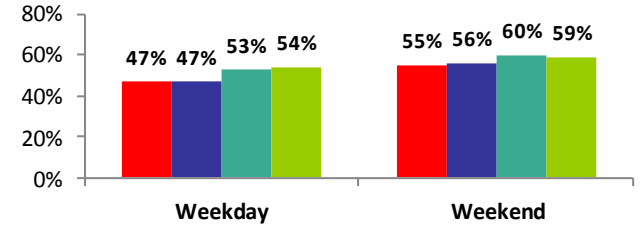
Weekday / Weekend

Room Occupancy

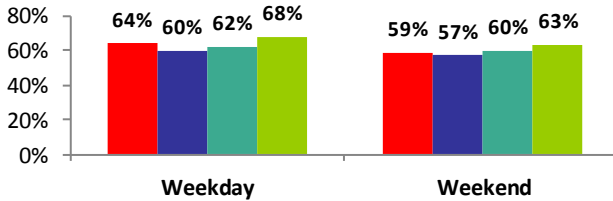
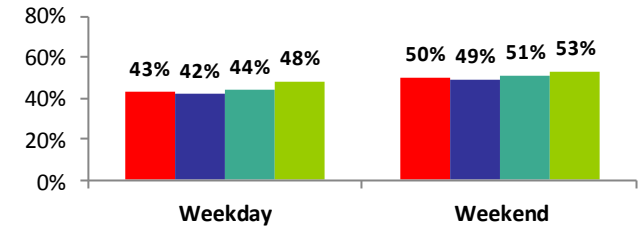


September 2011

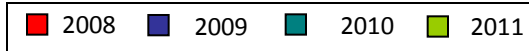
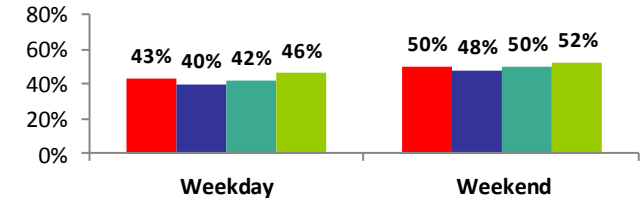
Bedspace Occupancy



Year to Date
(Jan 11 - Sept 11)

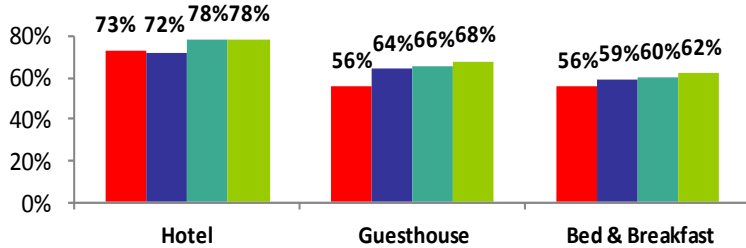


Past 12 Mths
(Oct 10 - Sept 11)



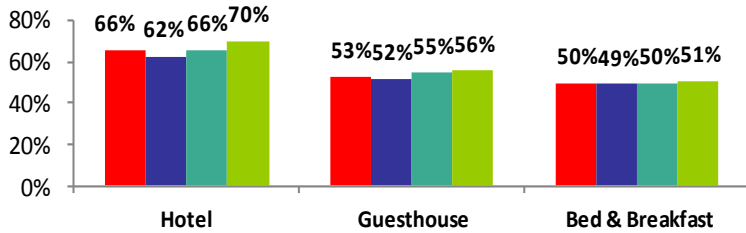
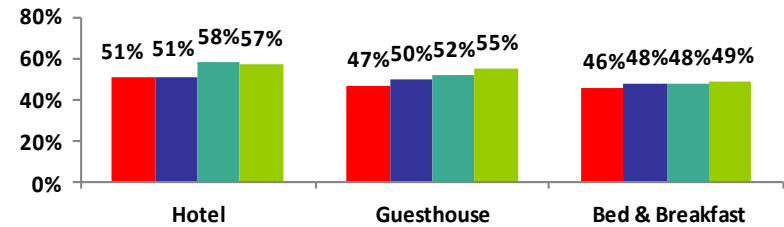
Establishment Type

Room Occupancy

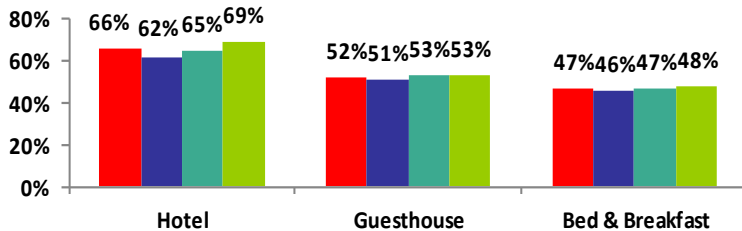
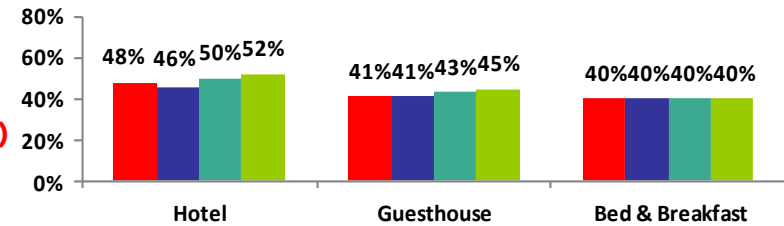


September
2011

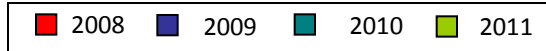
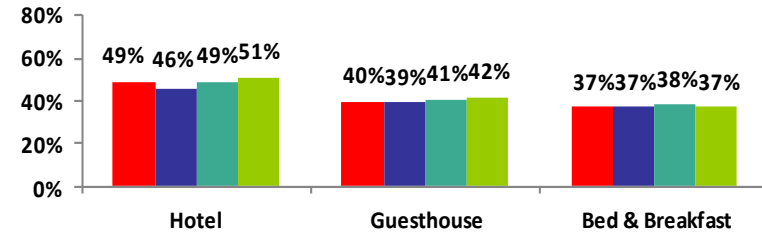
Bedspace Occupancy



Year to Date
(Jan 11 - Sept 11)



Past 12 Mths
(Oct 10 - Sept 11)

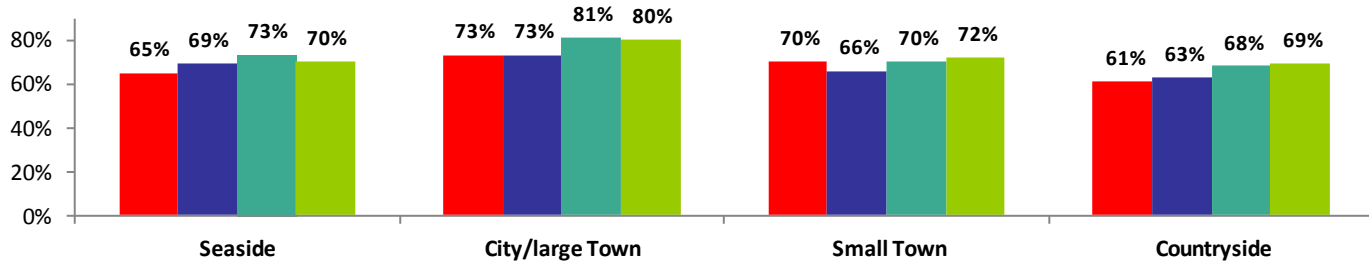


STR data is included in the year to date and past 12 months information for 2011 – for the Hotel sector only

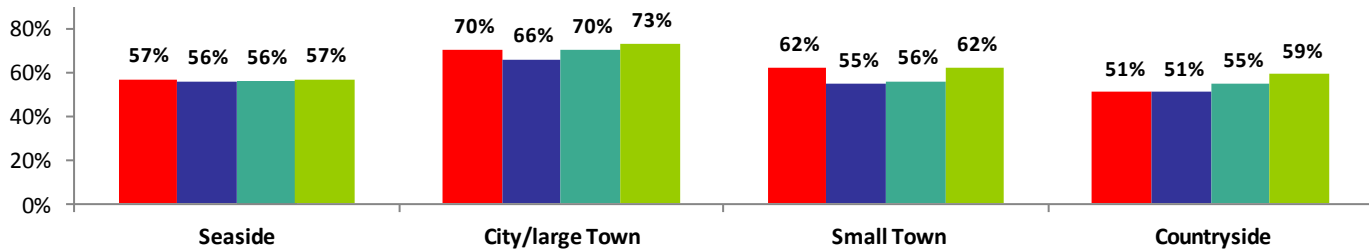
Location

Room Occupancy

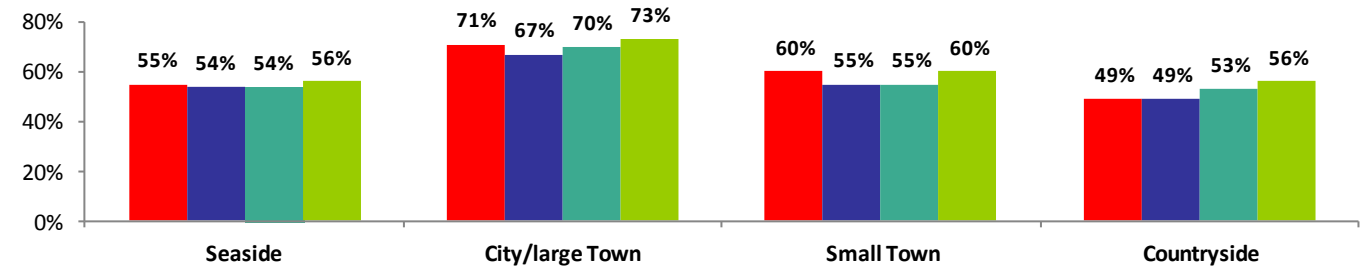
**September
2011**



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



**Past 12 months
(Oct 10 -Sept 11)**

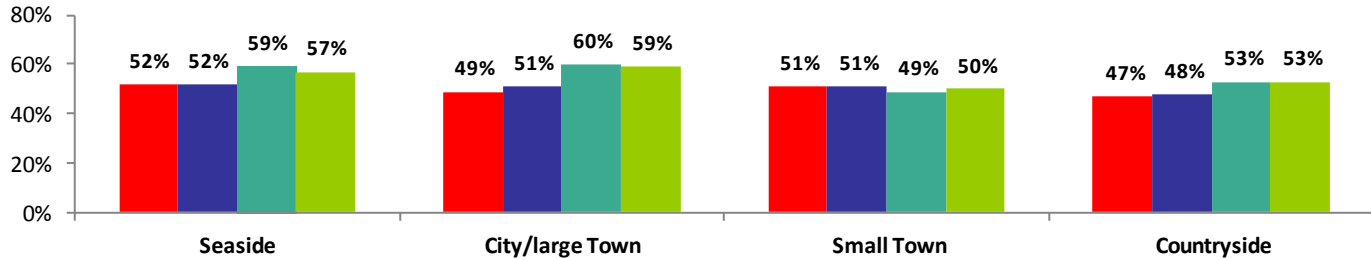


STR data is included in the year to date and past 12 months information for 2011 only

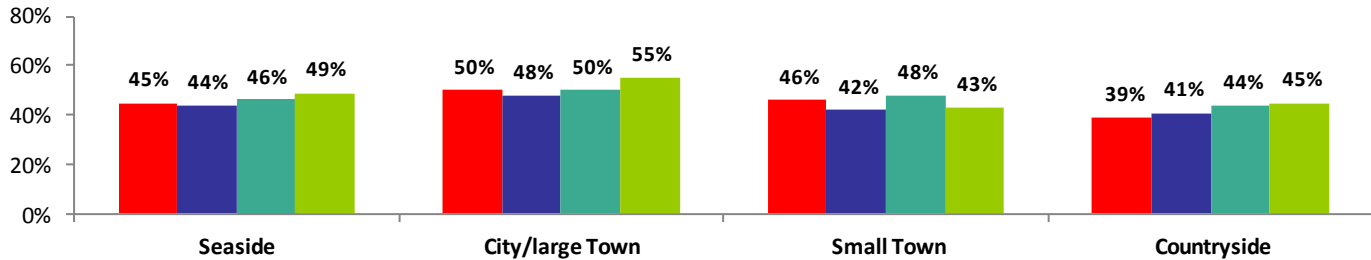
Location

Bedspace Occupancy

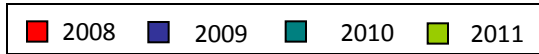
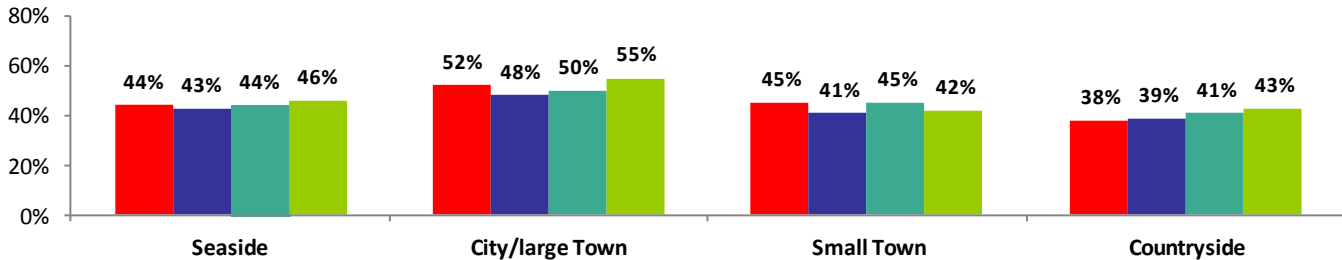
**September
2011**



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



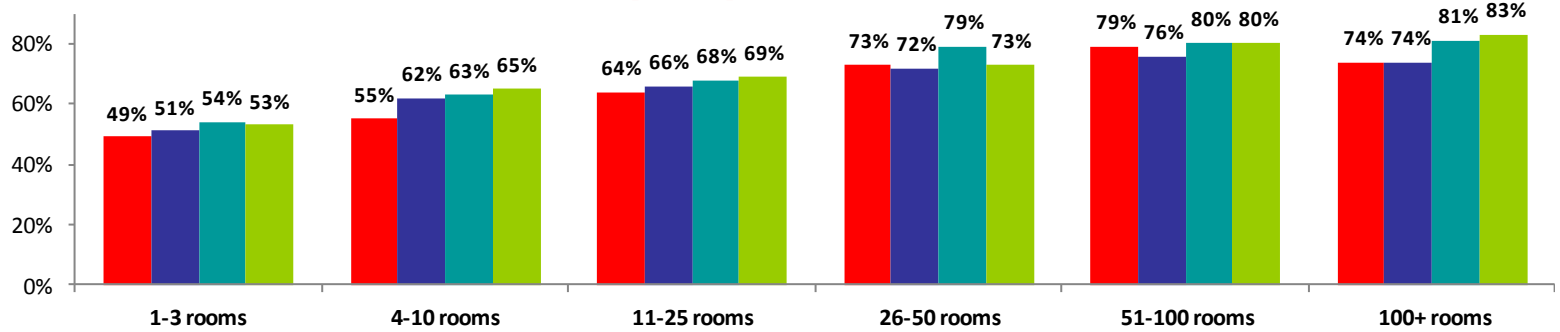
**Past 12 months
(Oct 10 -Sept 11)**



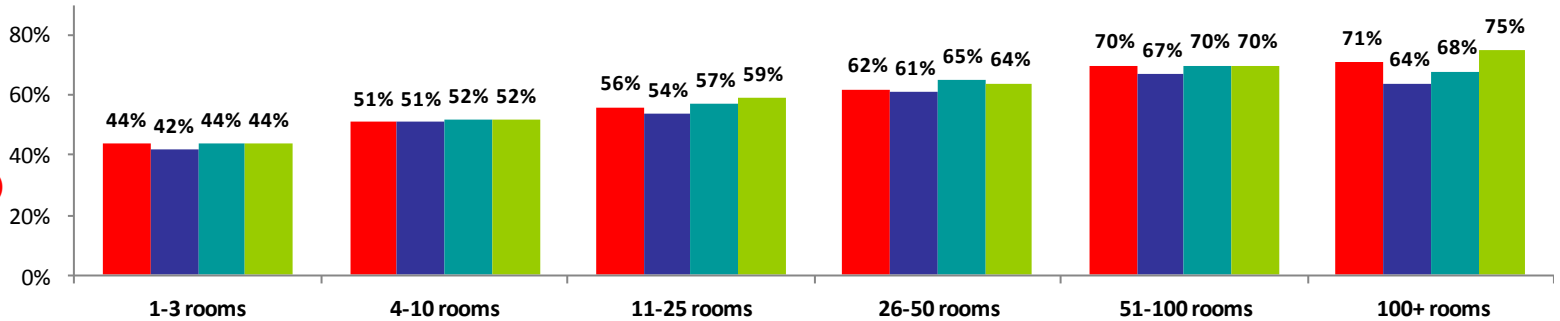
Number of Rooms

Room Occupancy

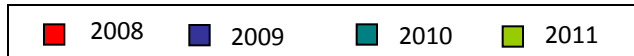
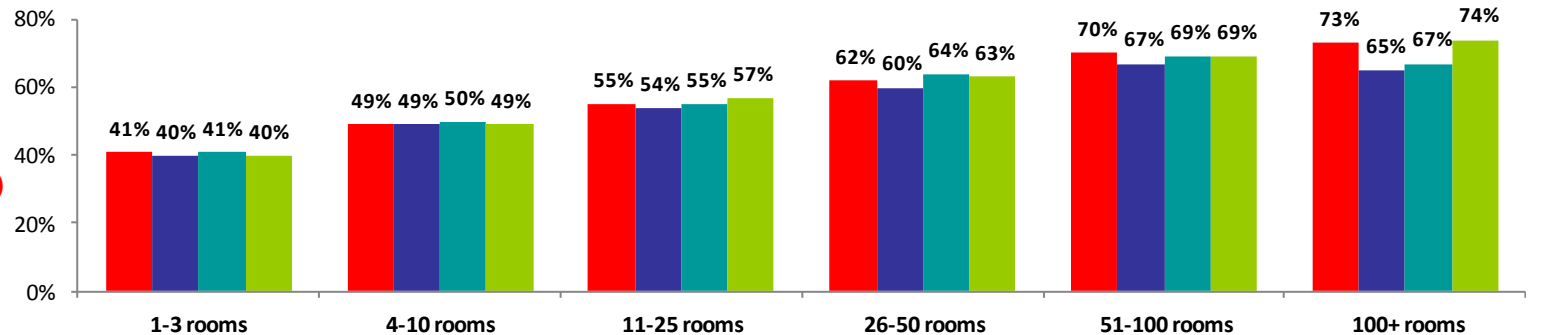
September 2011



Year to Date (Jan 11 - Sept 11)



Past 12 Mths (Oct 10 - Sept 11)

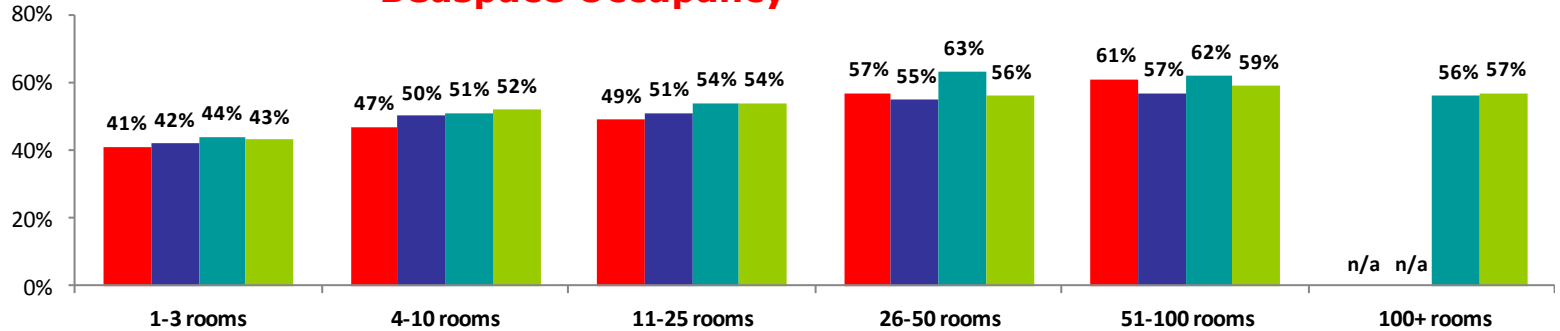


STR data is included in the year to date and past 12 months information for 2011 only

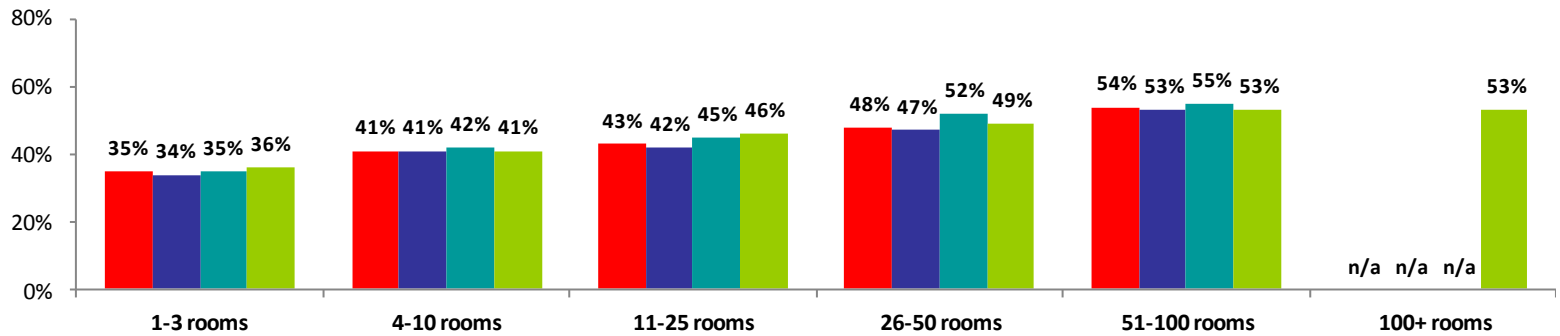
Number of Rooms

Bedspace Occupancy

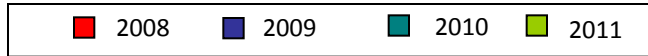
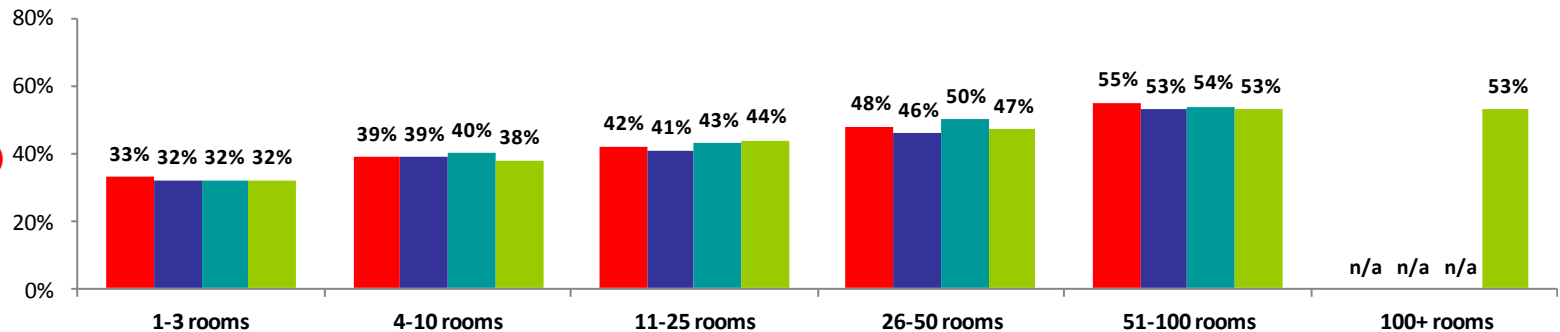
September
2011



Year to Date
(Jan 11-Sept 11)



Past 12 Mths
(Oct 10-Sept 11)



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