

# England Occupancy Survey

April 2012 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).
- At present this data is only included in the single month analysis (April) and for the 2012 year to date data, but not for past 12 month or year-to-date 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.

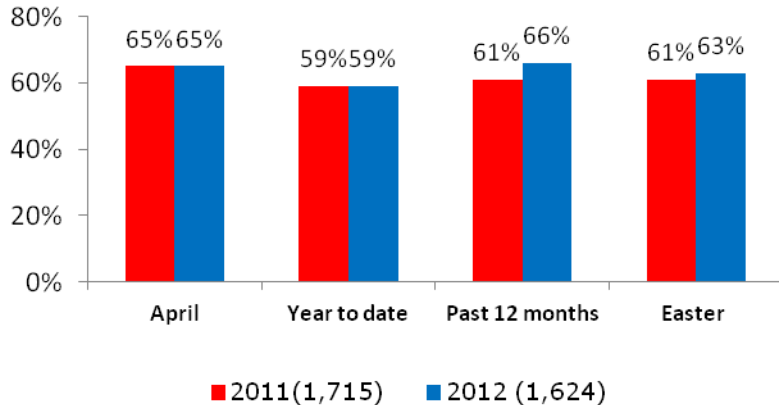
# England Occupancy Reporting April 2012 (including data from STR Global)

## Monthly Update : April 2012

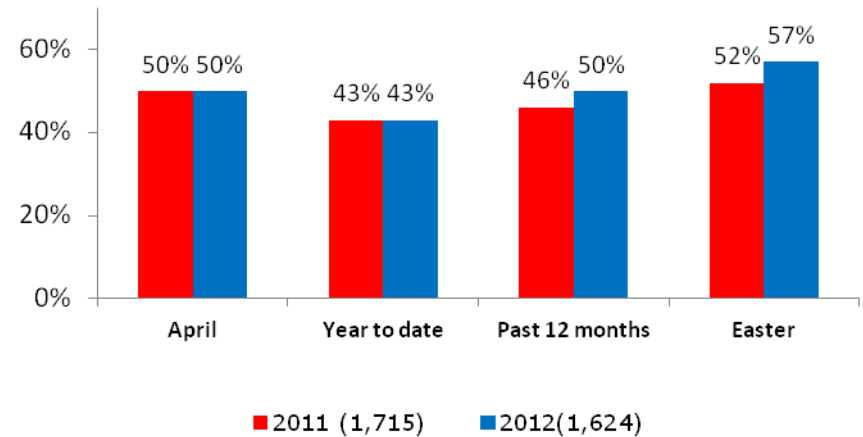
Across England as a whole, both room and bed occupancy levels had remained static compared with April 2011, as did room and bed occupancy levels for the year to date average. Over the past 12 months, occupancy levels for both room and bed occupancy had seen an increase compared with the same period last year.

Room and bed occupancy for the Easter bank holiday period for April 2012 were more positive than expected (with the poor weather and threat of a fuel strike ), both above the levels witnessed during 2011.

### Room Occupancy



### Bedspace Occupancy



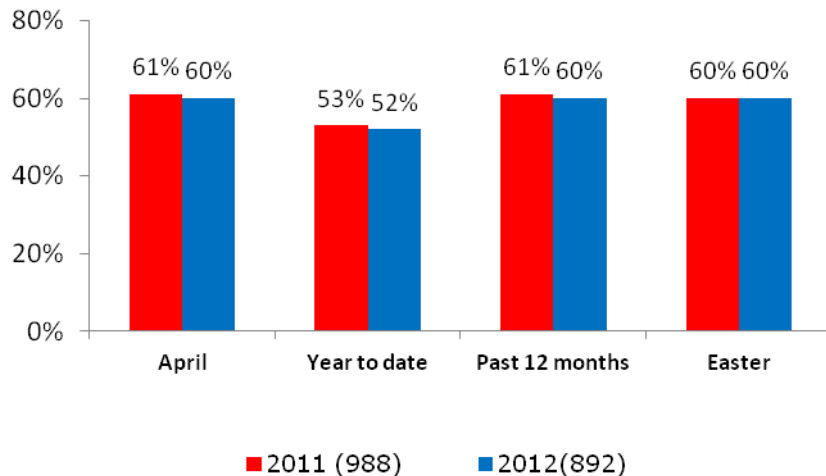
# England Occupancy Reporting April 2012 (excluding data from STR Global)

## Monthly Update : April 2012

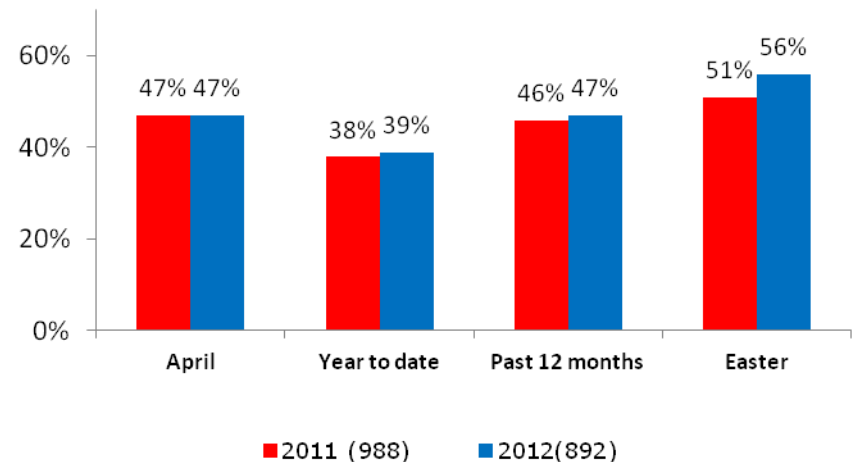
This update shows that in April 2012 England saw a slight decrease in room occupancy whilst bed occupancy levels remained the same compared with the previous year. The same pattern was also true for room occupancy levels for the year to date average and the past 12 months. However, bed occupancy for both year to date and the past 12 months saw a slight increase of 1% respectively.

Room occupancy levels for the Easter bank holiday period for April 2012 remained static whilst bed occupancy levels were much higher than the levels witnessed during 2011

### Room Occupancy



### Bedspace Occupancy



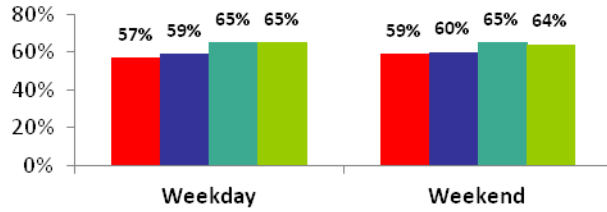
# England Occupancy Reporting

## April 2012

- Across England as a whole, both room and bed occupancy levels had remained static compared with April 2011, as did room and bed occupancy levels for the year to date average. Over the past 12 months, occupancy levels for both room and bed occupancy had seen an increase compared with the same period last year. The Easter Bank holiday weekend saw an increase in both room and bed occupancy levels compared with Easter 2011.
- Room and bed occupancy levels in April 2012 for weekday occupancy were on a par with levels achieved in 2011. Although weekend bed occupancy had also remained the same as April 2011, room occupancy had decreased slightly during this period.
- Only the hotel sector had managed to maintain the same levels of room and bed occupancy achieved during April 2011. Both guesthouses and bed and breakfast establishments had seen room and bed occupancy levels fall during April 2012, in contrast to previous years where all sectors had seen a steady growth in occupancy levels over a three year period.
- Both city/large towns and small towns witnessed an increase in both room and bed occupancy levels compared with April 2011. Both room and bed occupancy levels for seaside and countryside locations had fallen, with seaside room occupancy decreasing by 5 percentage points compared with the previous year.
- Across the three largest size bands, room occupancy levels had increased when compared with the previous year, whilst those establishments with less than 25 rooms had all fallen during this period. With the exception of the 51-100 size band which witnessed a significant increase in bed occupancy levels, all other size bands had seen a decrease in bed occupancy levels compared with the same period in April 2011.

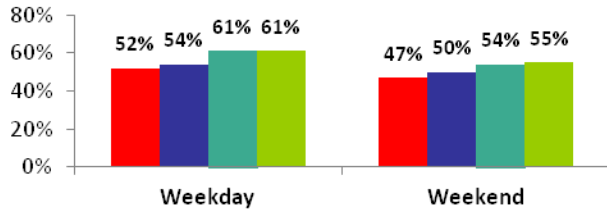
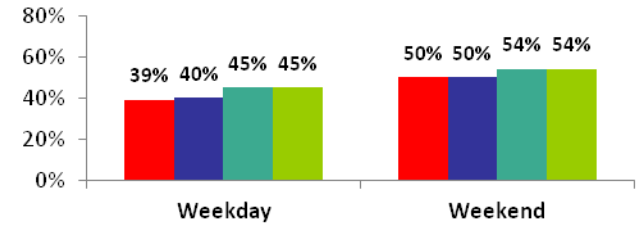
# Weekday / Weekend

## Room Occupancy

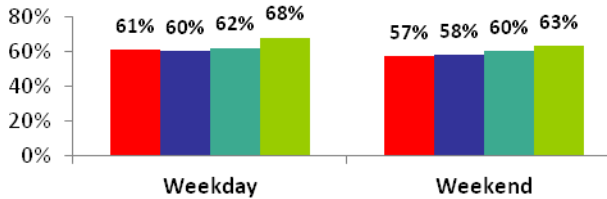
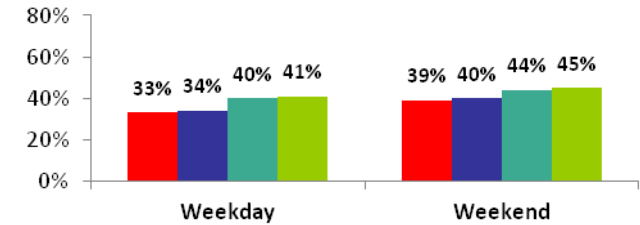


April 2012

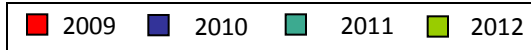
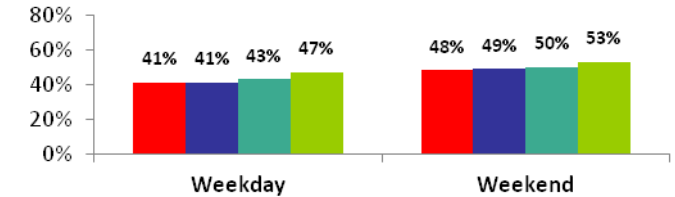
## Bedspace Occupancy



Year to Date  
(Jan 12 - Apr 12)

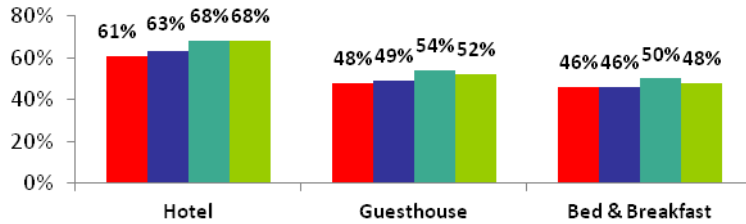


Past 12 Mths  
(May 11 - Apr 12)



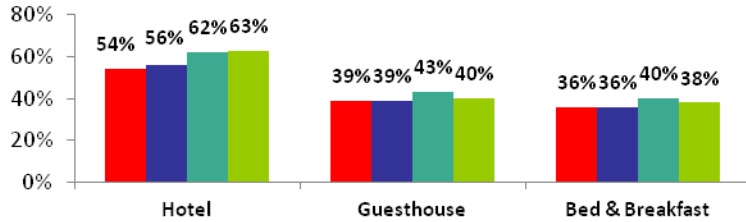
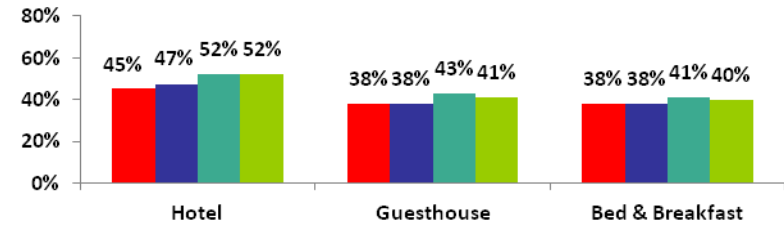
# Establishment Type

## Room Occupancy

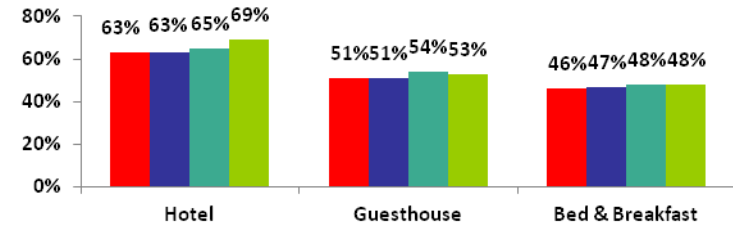
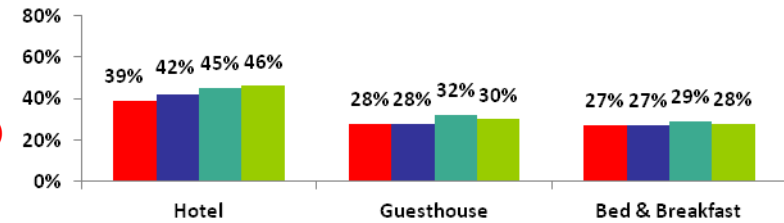


April 2012

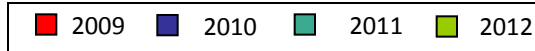
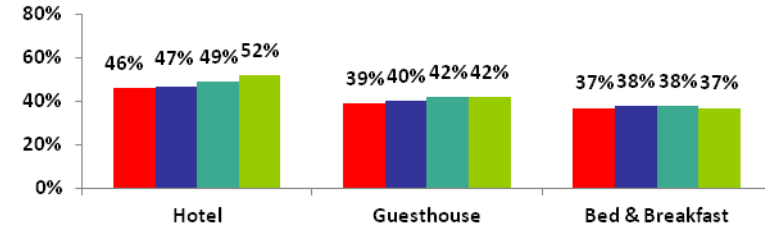
## Bedspace Occupancy



Year to Date  
(Jan 12 - Apr 12)



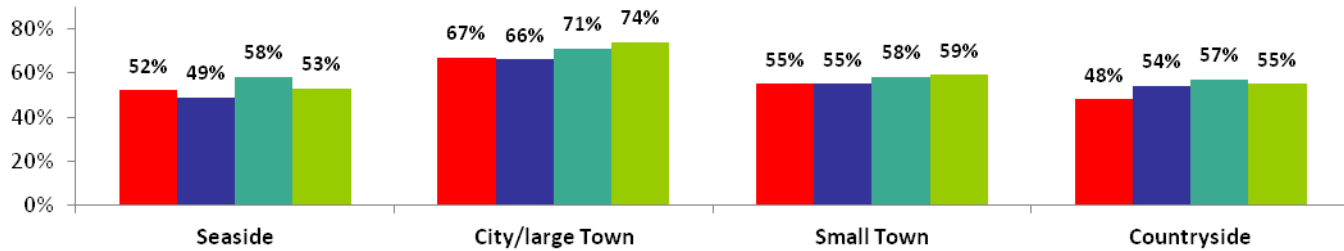
Past 12 Mths  
(May 11 - Apr 12)



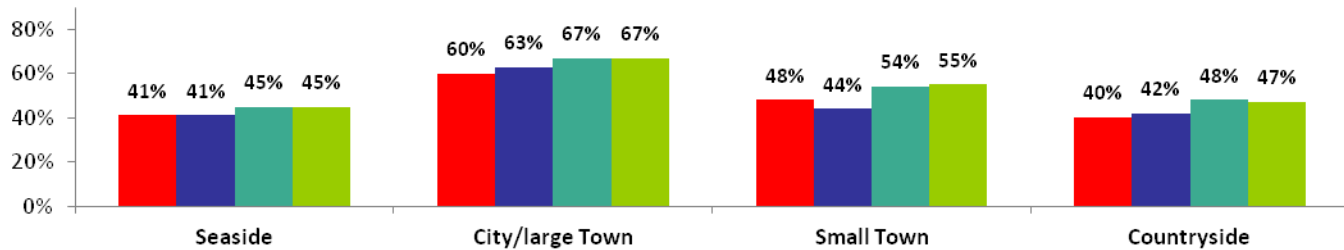
# Location

## Room Occupancy

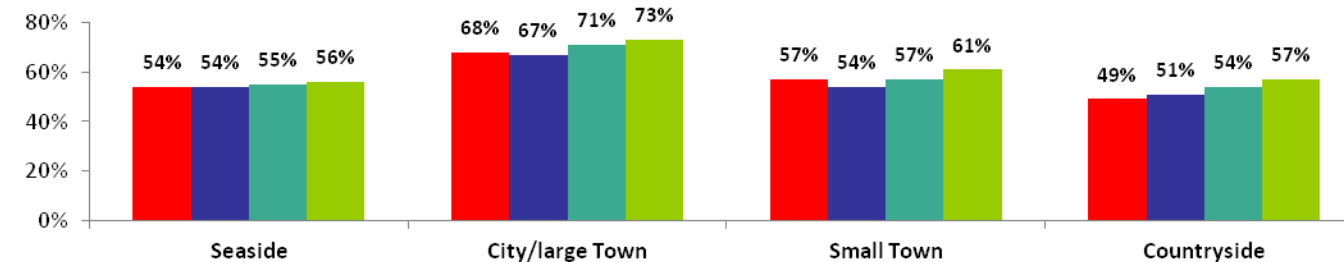
**April 2012**



**Year to Date  
(Jan 12 - Apr 12)**



**Past 12 months  
(May 11 - Apr 12)**



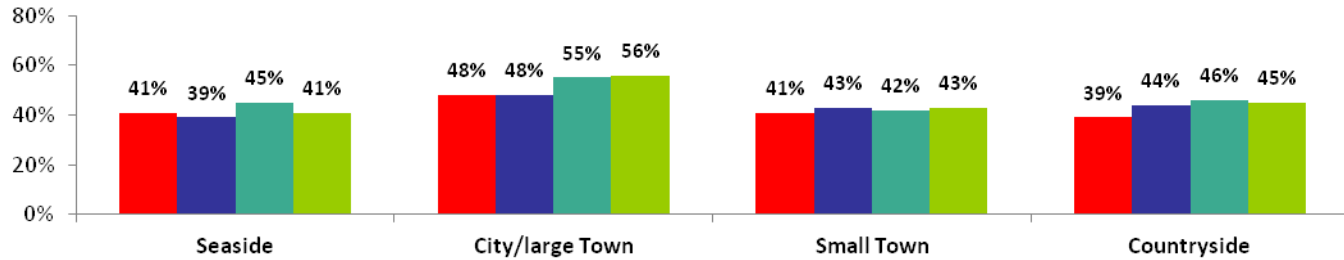
STR data is included in the year to date for 2011 and 2012 and the past 12 months for May-December 2011 data and 2012 data



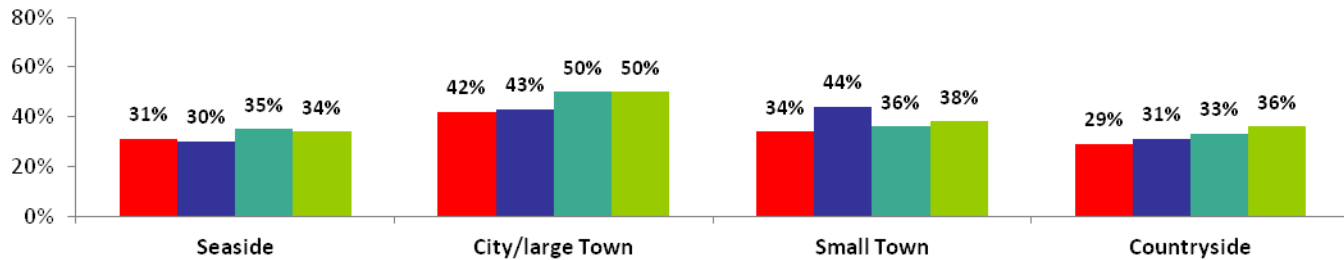
# Location

## Bedspace Occupancy

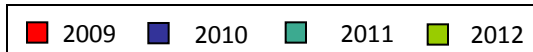
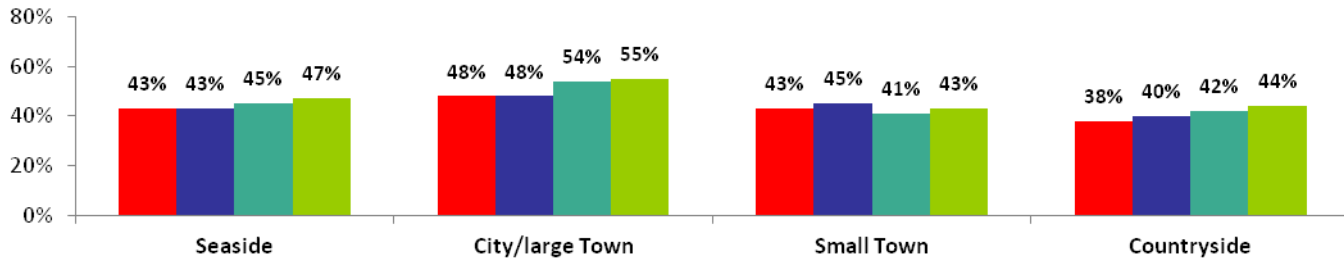
April 2012



Year to Date  
(Jan 12 - Apr 12)



Past 12 months  
(May 11- Apr 12)

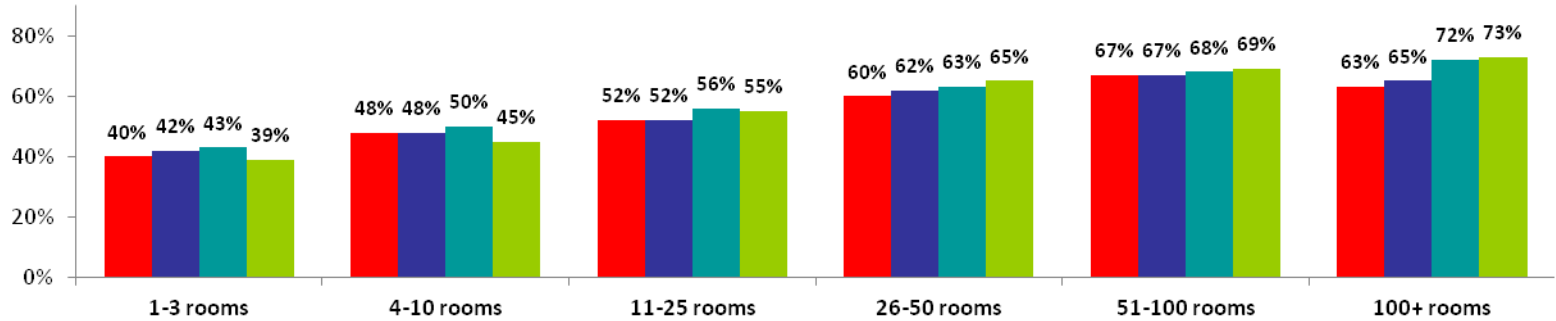


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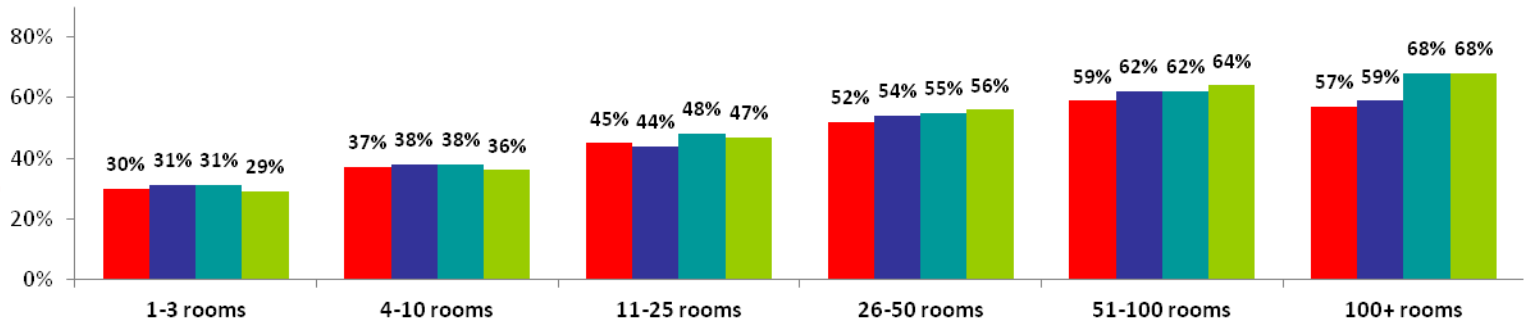
# Number of Rooms

## Room Occupancy

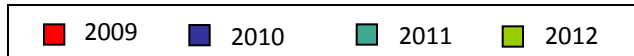
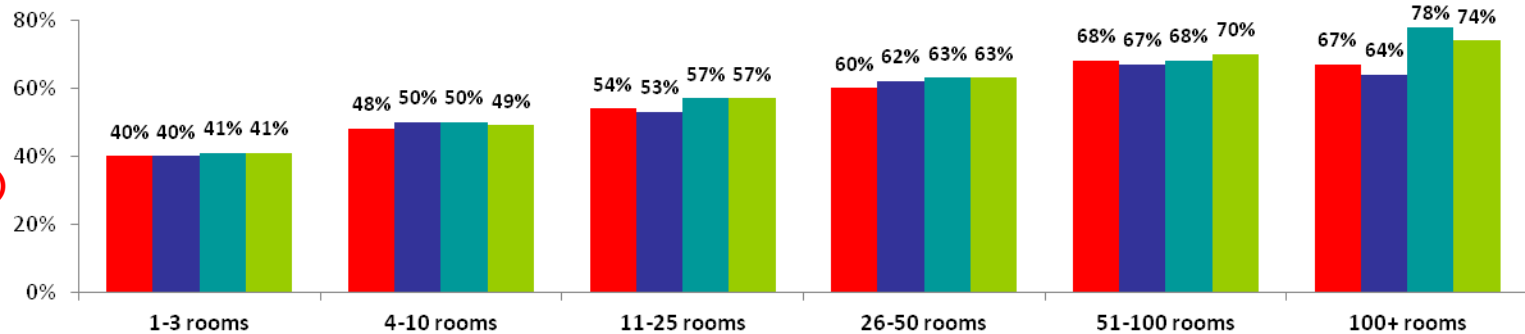
**April 2012**



**Year to Date  
(Jan 12 - Apr 12)**



**Past 12 Mths  
(May 11 - Apr 12)**

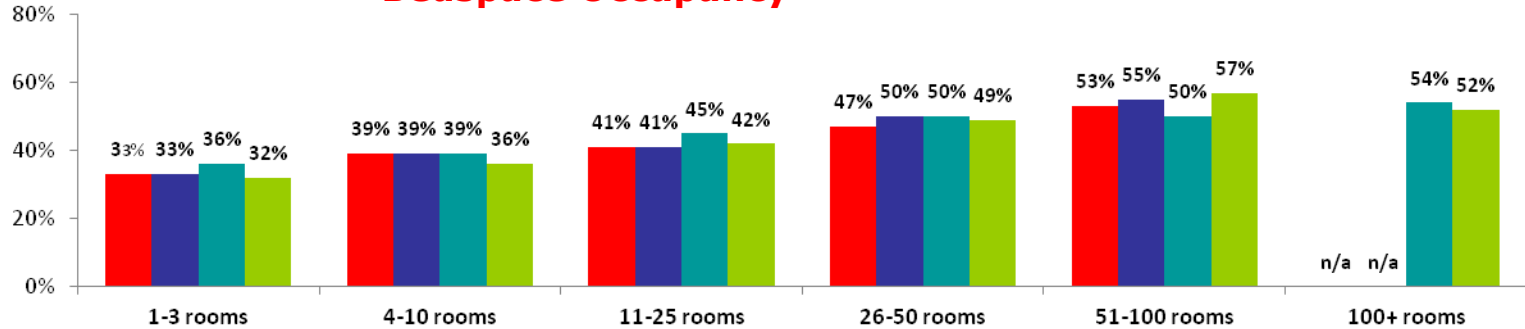


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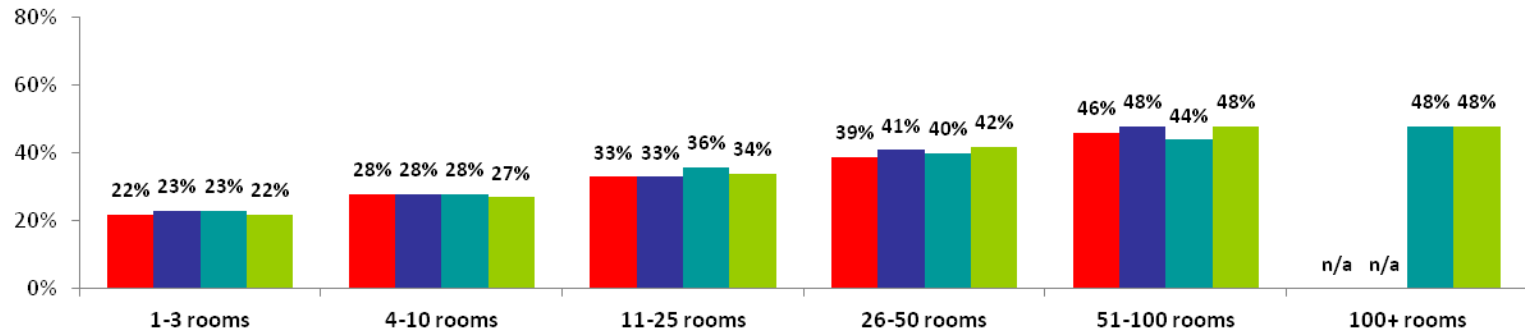
# Number of Rooms

## Bedspace Occupancy

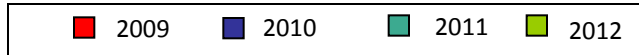
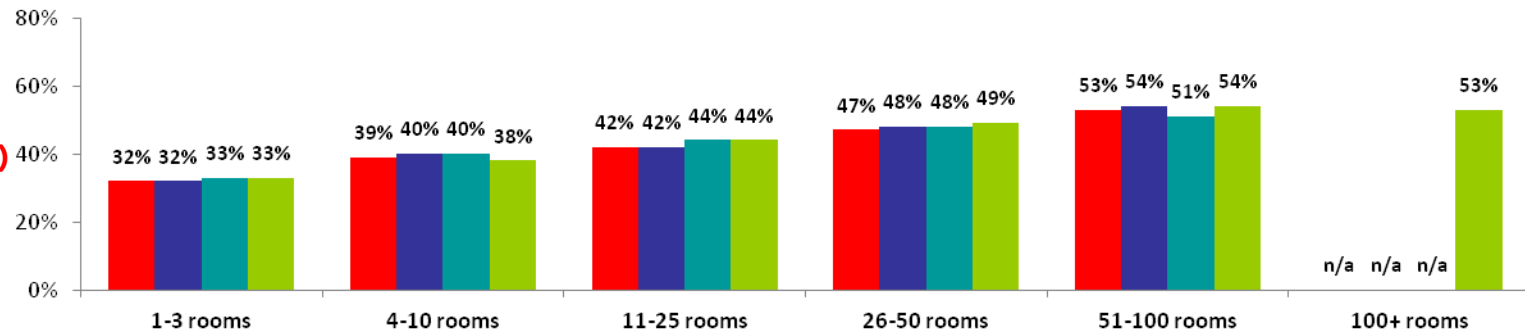
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