

# England Occupancy Survey

August 2012 Results

# Note: Change in Occupancy Reporting

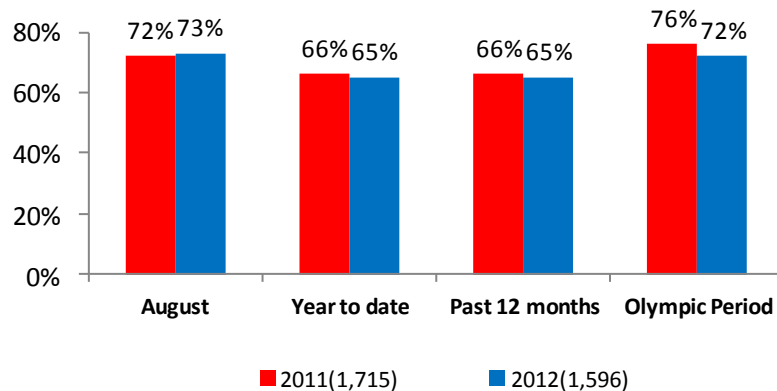
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas, business travellers vs. non business travellers).
- At present this data is only included in the single month analysis (August) and for the 2011 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.
- This report is undertaken by The Research Solution, survey administrators on behalf of Visit England.

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

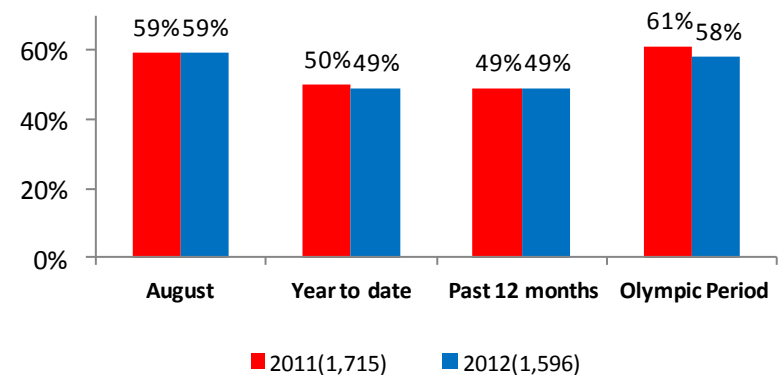
## Monthly Update : August 2012

In August 2012, room occupancy across England increased by 1 percentage point compared with the previous year, whilst bed occupancy levels remained static compared with August 2011. Room and bed occupancy levels for the year to date average were slightly below the levels achieved during the same period last year. A similar pattern was seen for room occupancy during the past 12 months, with bed occupancy levels remaining the same as in 2011. Occupancy levels during the Olympic period were below those achieved in the same period last year.

### Room Occupancy



### Bedspace Occupancy

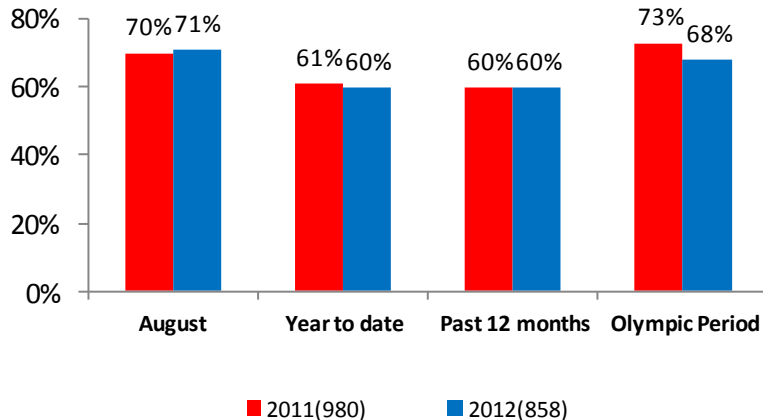


# England Occupancy Reporting August 2012 (excluding data from STR Global)

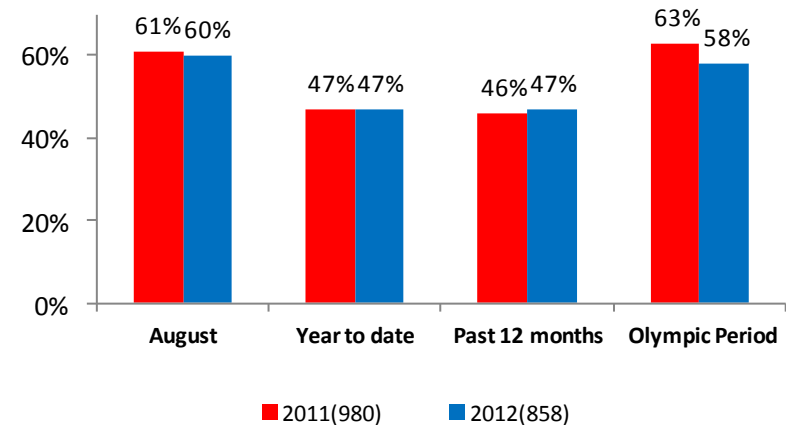
## Monthly Update : August 2012

In August 2012 England witnessed a slight increase in room occupancy levels compared with August 2011 and a slight drop in bed occupancy levels during this month. Room occupancy for the year to date average fell slightly compared with the same period last year, whilst bed occupancy remained at the same level as in 2011. Bed occupancy for the past 12 months average witnessed a slight increase on the levels achieved in August 2011, with room occupancy levels remaining static with August 2011. Occupancy levels during the Olympic period for both room and bed occupancy were below the levels achieved in the same period last year.

### Room Occupancy



### Bedspace Occupancy

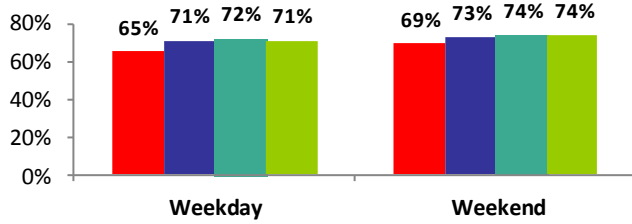


# England Occupancy Reporting August 2012

- Across England as a whole, room occupancy levels witnessed a slight increase and bed occupancy remained the same as levels achieved in August 2011.
- Weekend room and bed occupancy levels remained static in August 2012, whilst weekday room and bedspace occupancy fell slightly by 1 percentage point during this month.
- Both guesthouses and B&B's had witnessed a decline in both room and bedspace occupancy during August 2012, with notably the biggest drop of 4 percentage points in room occupancy in B&B establishments. Room occupancy in the hotel sector had risen slightly whilst bed occupancy had remained the same as 2011.
- The picture across all location types in England in August 2012 was mixed. City/large town and small town locations had both seen an increase of 3 percentage points in room occupancy levels whilst bedspace occupancy for small towns was down and for city/large towns the same as in August 2011. Seaside locations saw the biggest decrease in bed occupancy by 8 percentage points for bedspace occupancy, but only a 1 percentage fall in room occupancy.
- Establishments in size bands 26 and over performed better during August 2012 than the smaller size bandings. The 26-50 size band had increased both room and bedspace occupancy (up 4 and 5 percentage points respectively) with smaller increases in both the 51-100 and 100+ size bandings. The 1-3 and 4-10 size bands had seen a fall in both room and bedspace levels when compared with the previous year.

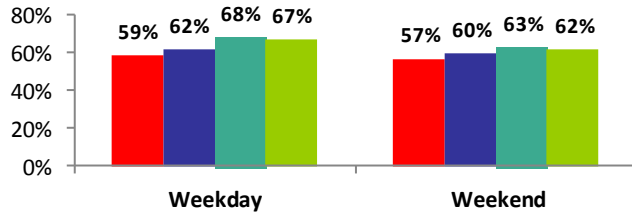
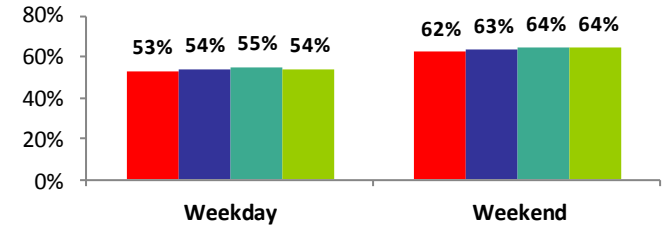
# Weekday / Weekend

## Room Occupancy

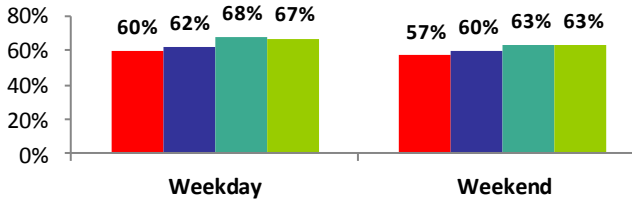
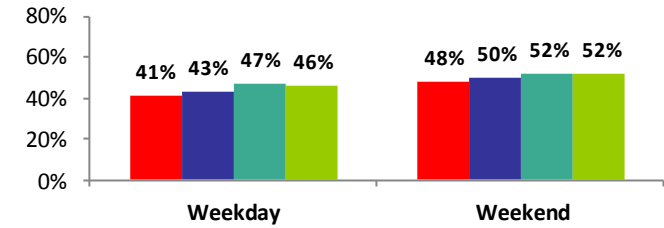


August 2012

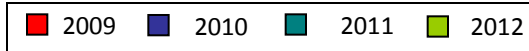
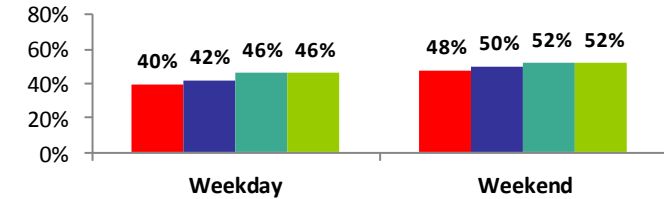
## Bedspace Occupancy



Year to Date  
(Jan 12 - Aug 12)

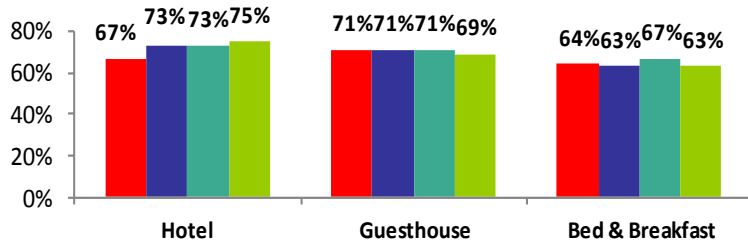


Past 12 Mths  
(Sept 11 - Aug 12)



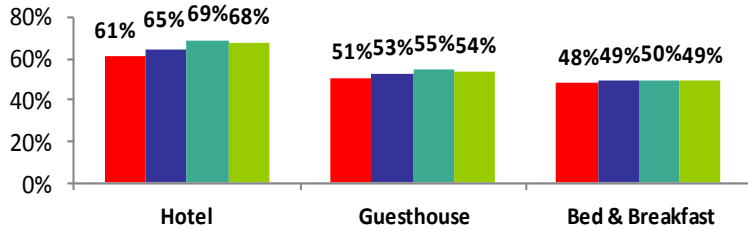
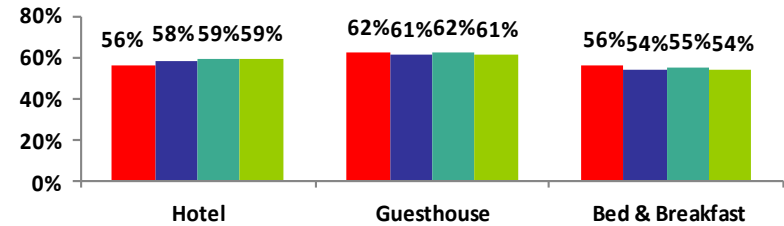
# Establishment Type

## Room Occupancy

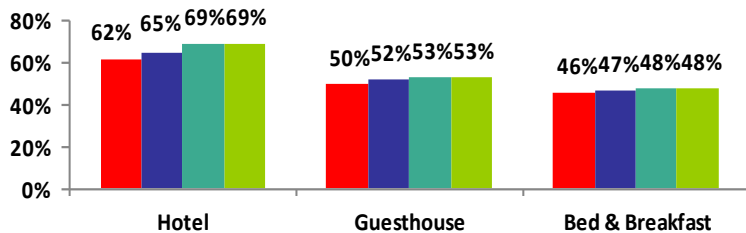
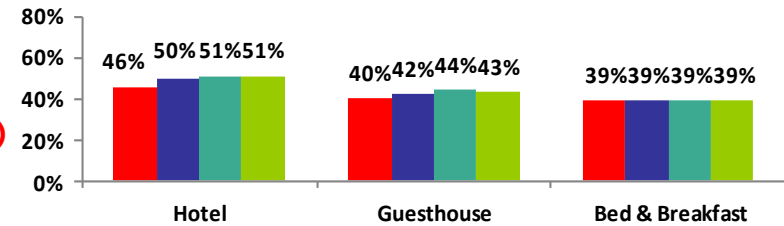


August 2012

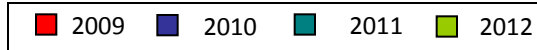
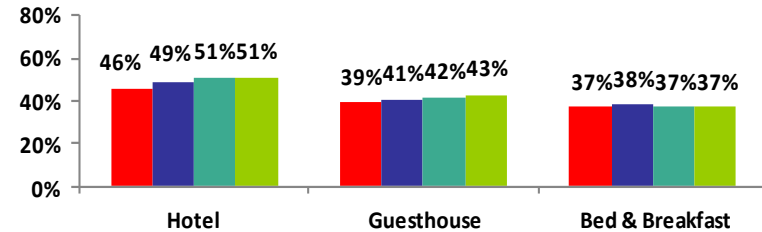
## Bedspace Occupancy



Year to Date  
(Jan 12 - Aug 12)



Past 12 Mths  
(Sept 11 - Aug 12)

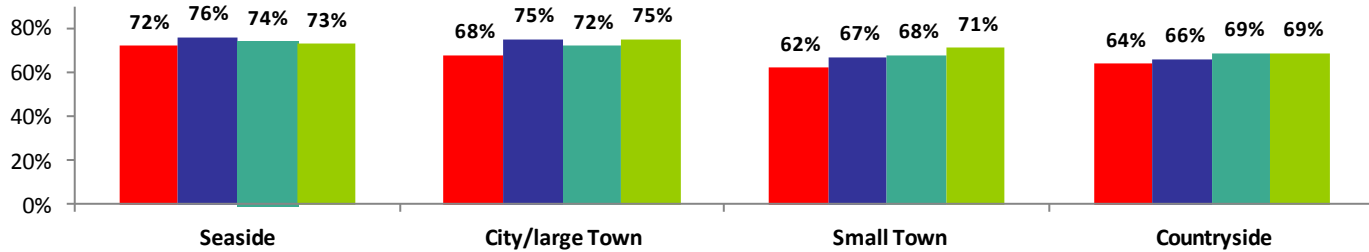


STR data is included in the year to date for 2011 and 2012 and the past 12 months for May-December 2011 data and 2012 data

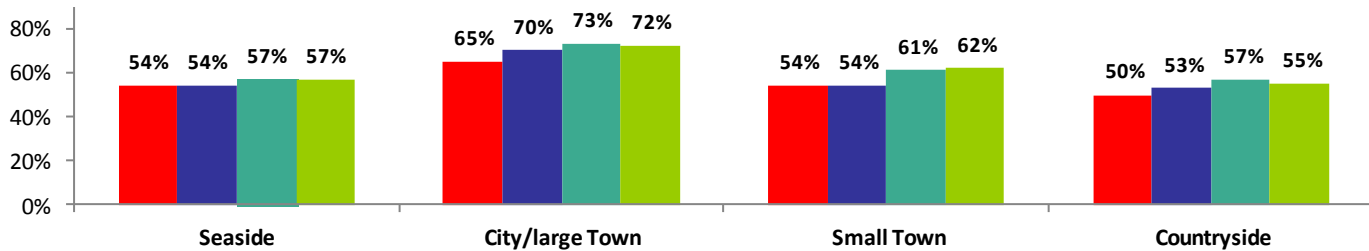
# Location

## Room Occupancy

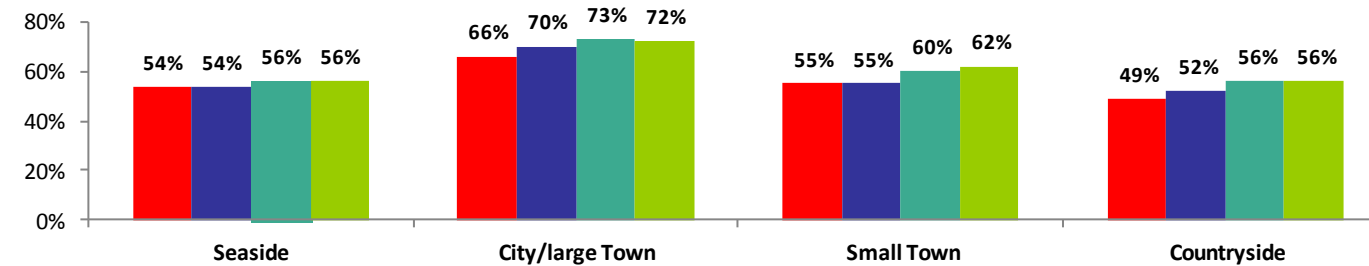
August 2012



Year to Date  
(Jan 12 - Aug 12)



Past 12 months  
(Sept 11 - Aug 12)



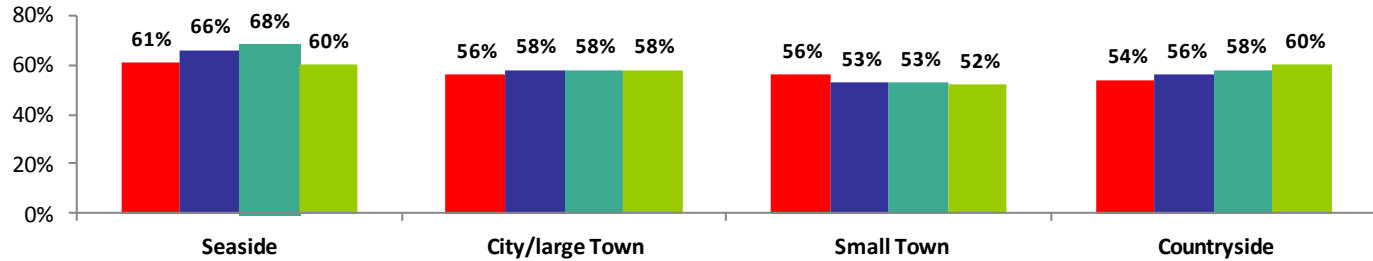
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# Location

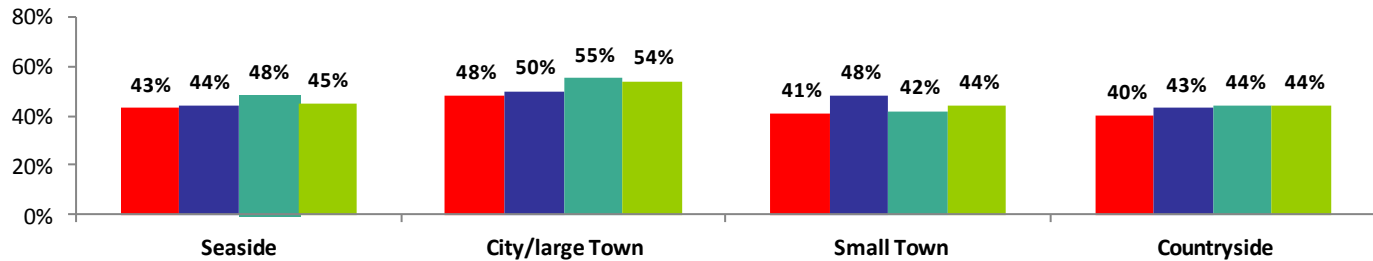
## Bedspace Occupancy

August 2012



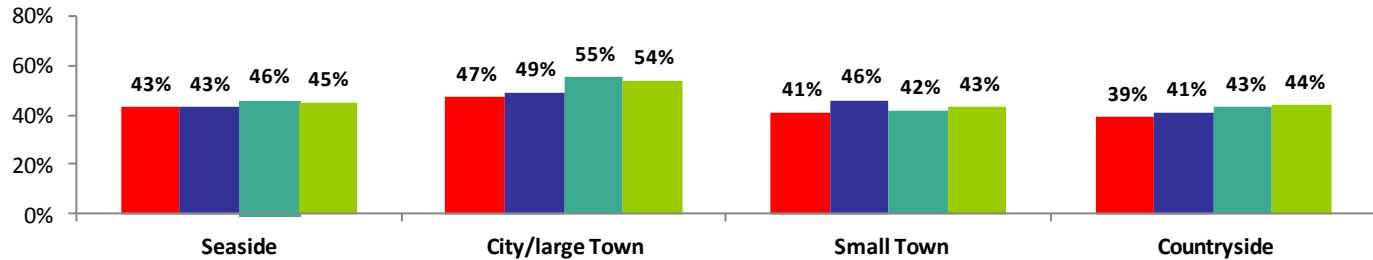
Year to Date

(Jan 12 - Aug 12)



Past 12 months

(Sept 11- Aug 12)

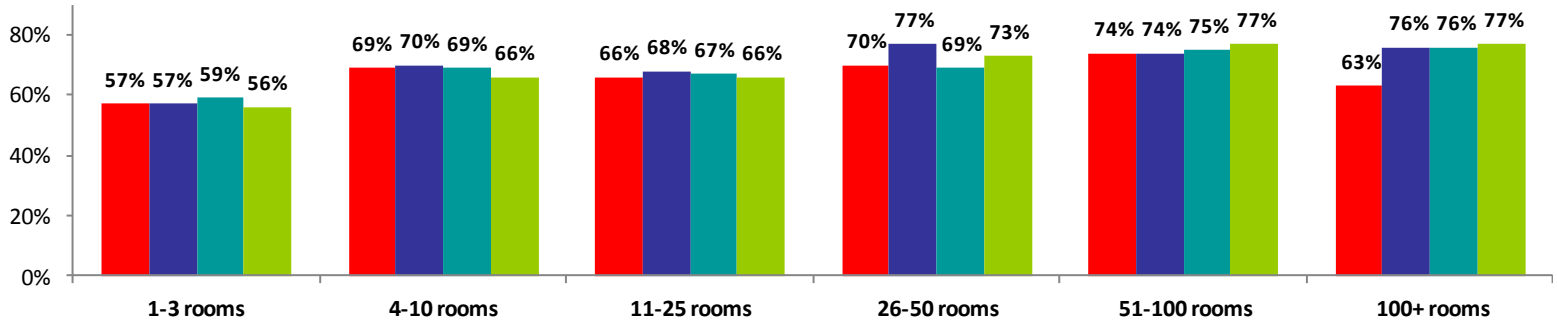


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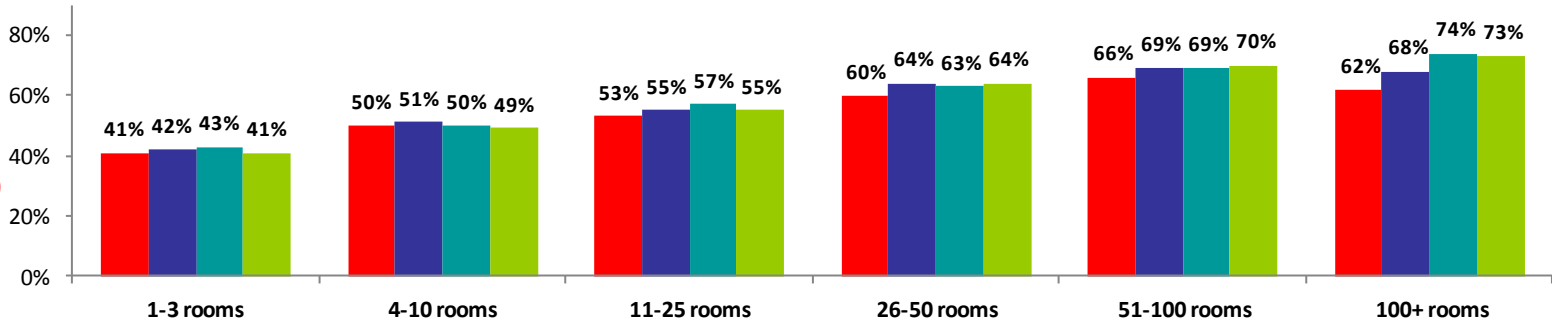
# Number of Rooms

## Room Occupancy

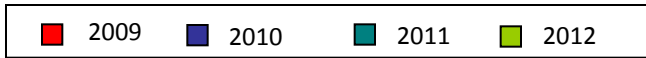
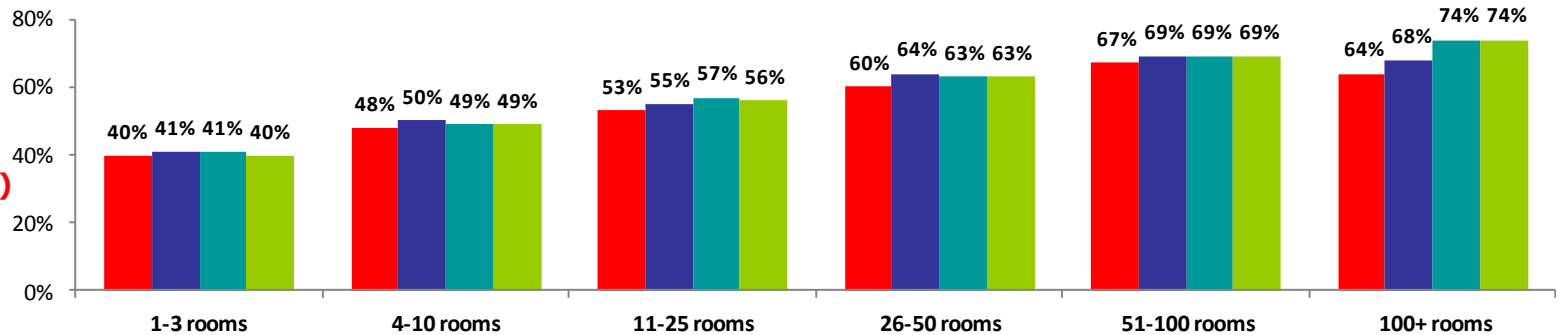
August 2012



Year to Date  
(Jan 12 - Aug 12)



Past 12 Mths  
(Sept 11 - Aug 12)

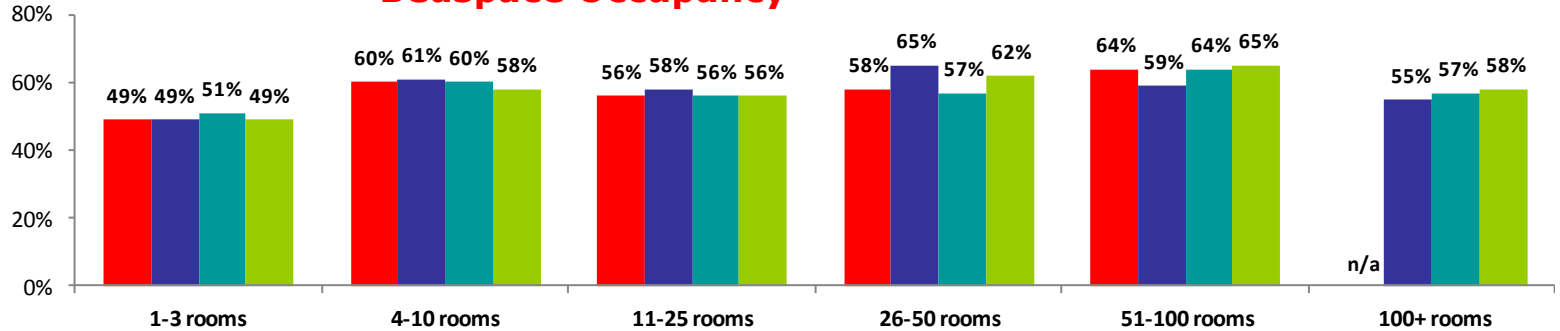


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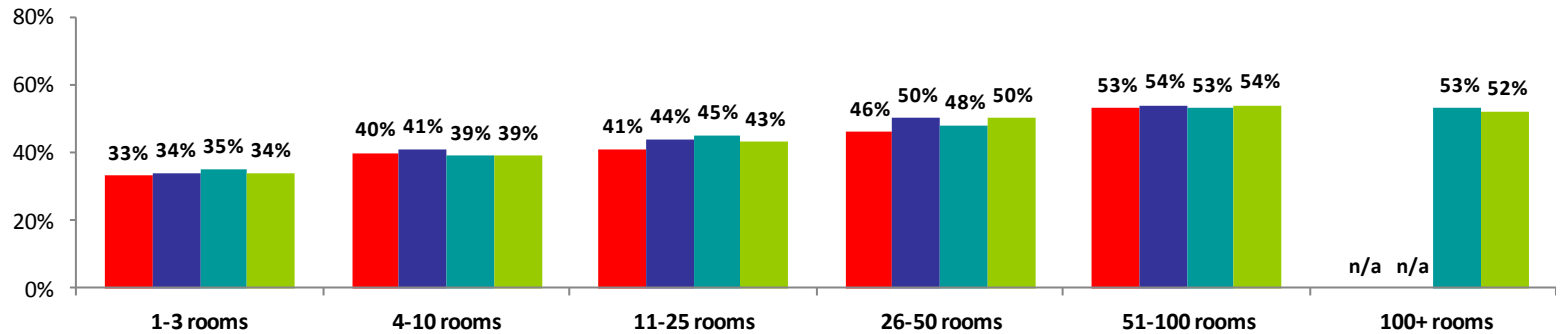
# Number of Rooms

## Bedspace Occupancy

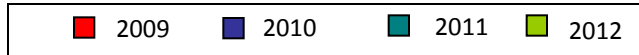
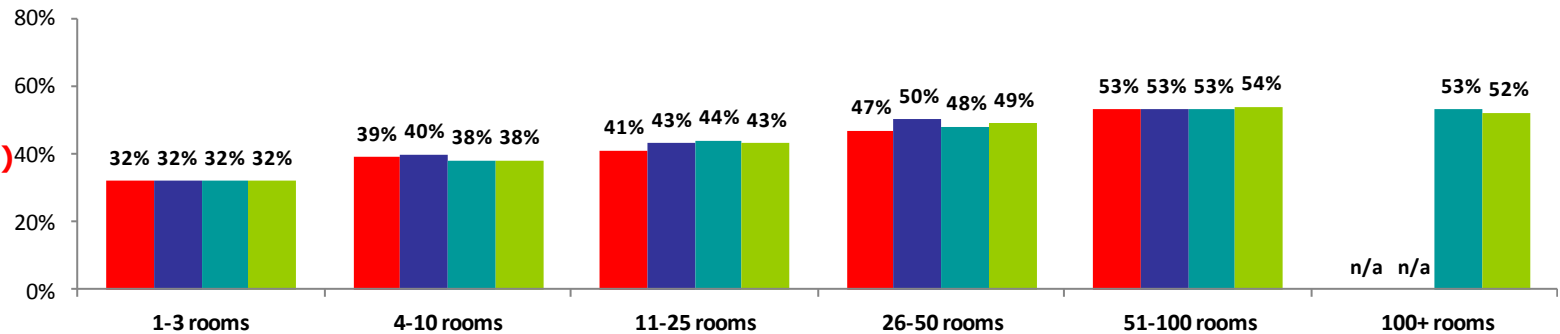
August 2012



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