

England Occupancy Survey

January 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 (January) and not for past 12 month or year-to-date data 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.



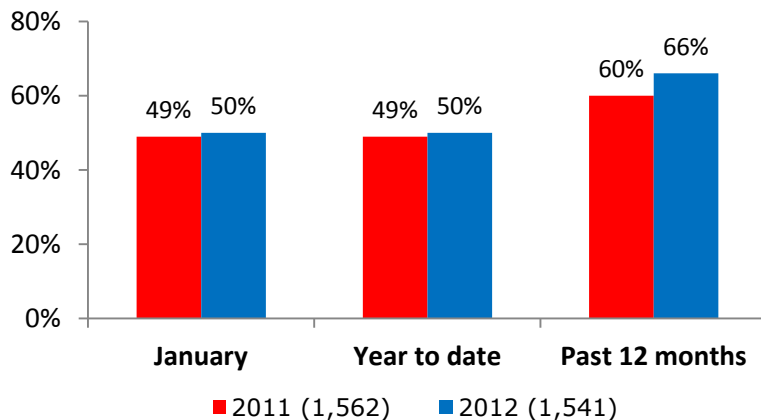
England Occupancy Reporting January 2012 (including data from STR Global)

Monthly Update : January 2012

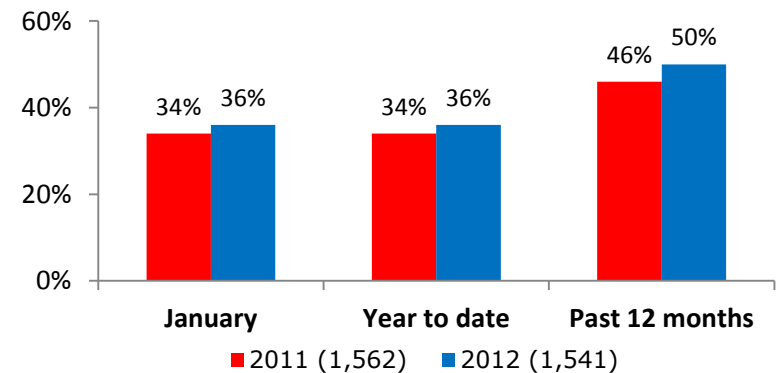
This update shows that in January 2012 England witnessed a slight increase in both room and bed occupancy levels compared with January 2011.

Room and bed occupancy levels for the year to date average were on a par but data for the past 12 months average had witnessed a significant increase for both room and bed occupancy, well above the levels achieved during the same period last year.

Room Occupancy



Bedspace Occupancy



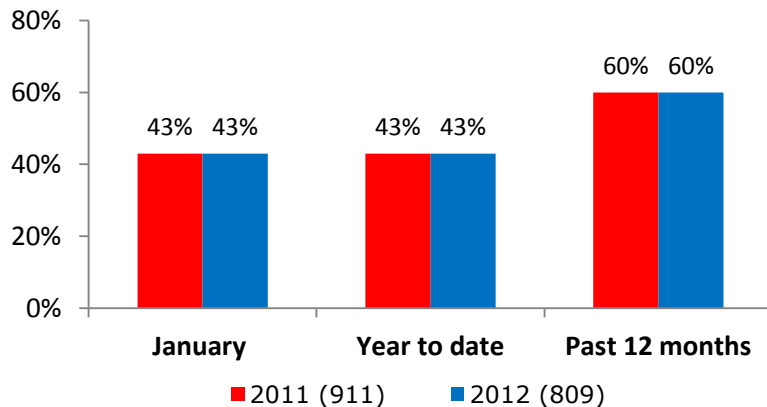
England Occupancy Reporting January 2012 (excluding data from STR Global)

Monthly Update : January 2012

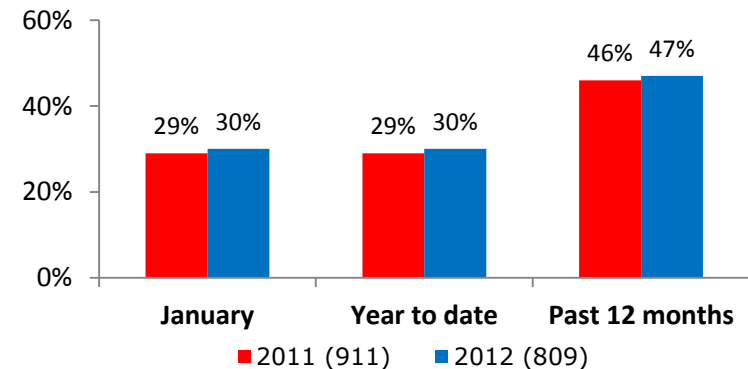
This update shows that in January 2012 room and bed occupancy levels across England remained static compared with January 2011.

Room occupancy levels for the year to date average and the past 12 months also remained the same whilst bed occupancy levels saw a slight increase in 2012 compared to the same period last year.

Room Occupancy



Bedspace Occupancy

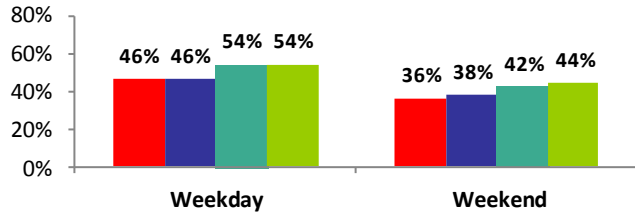


England Occupancy Reporting January 2012

- Across England as a whole, both room and bed occupancy levels were slightly above those achieved during January 2011.
- The weekday room occupancy levels in January 2012 was on a par with the previous year whilst weekend room occupancy saw a small increase on the 2011 percentage. Both weekday and weekend bedspace occupancy rose significantly when compared with the same period in 2011.
- Only the hotel sector witnessed an increase in both room and bed occupancy in January 2012, a pattern that has continued over the last four years. The Guesthouse and B&B sectors both saw a decrease in room and bed occupancy levels when compared with the same month in 2011.
- With the exception of city/large towns, the remaining locations witnessed an increase in both room and bed occupancy levels compared with January 2011, the highest levels for the last 4 years.
- Room occupancy levels in the larger size bandings, 51-100 and 100+ had seen an increase compared with 2011. However, those establishments in the smaller size bands, 1-3, 4-10 and 11-25 had seen a decrease in room occupancy levels achieved in the previous year. Bed occupancy levels across the larger size bandings have also increased compared with 2011 levels, whilst the 1-3 and 11-25 size bands had witnessed a slight decrease in occupancy. The 4-10 size band had remained static during this period.

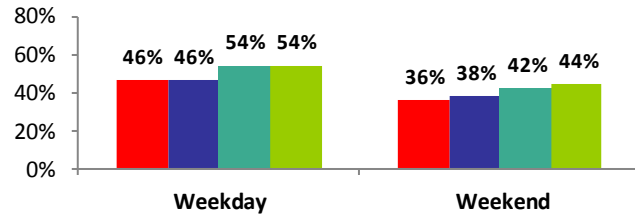
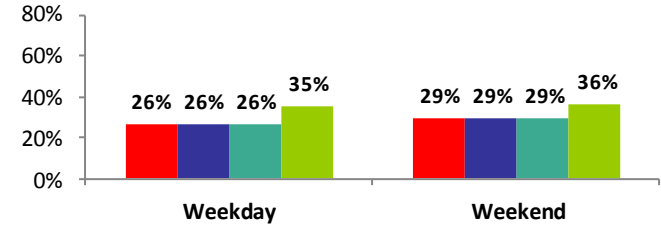
Weekday / Weekend

Room Occupancy

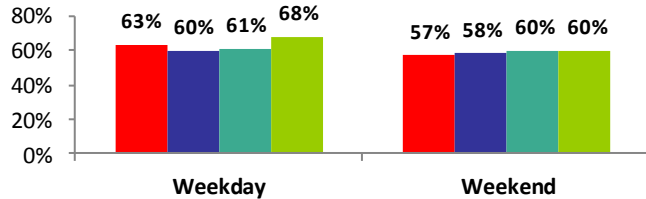
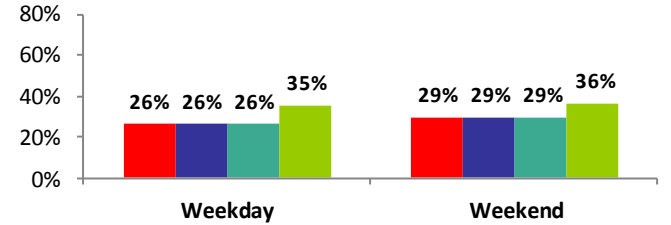


January 2012

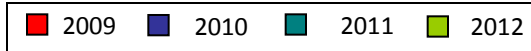
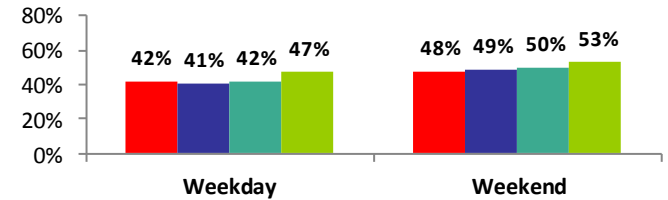
Bedspace Occupancy



Year to Date
(January 2012)

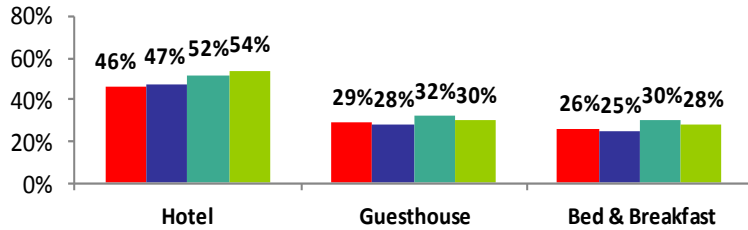


Past 12 Mths
(Feb 11 - Jan 12)



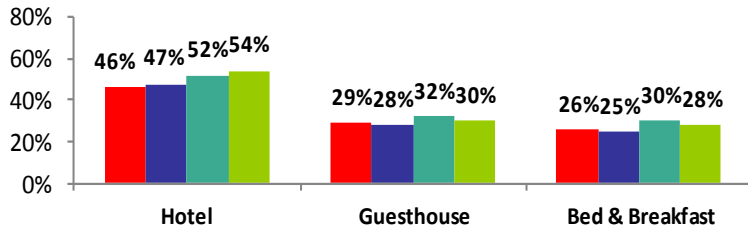
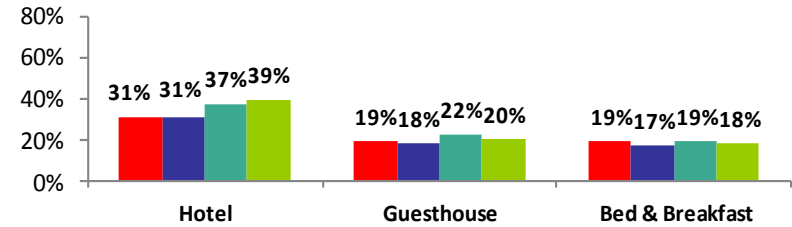
Establishment Type

Room Occupancy

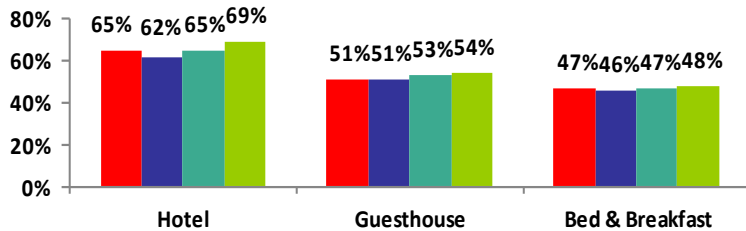
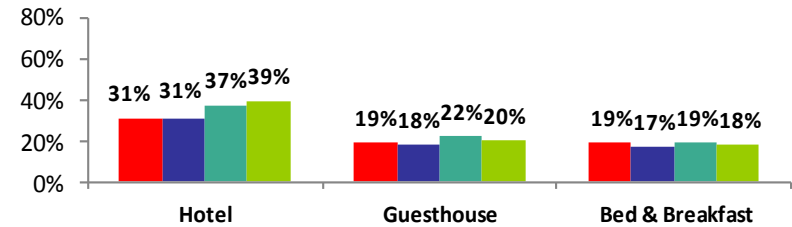


January 2012

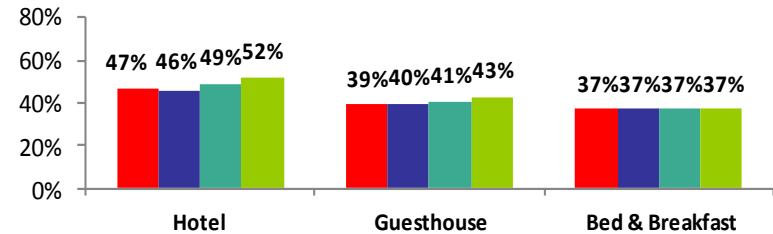
Bedspace Occupancy



Year to Date
(January 2012)



Past 12 Mths
(Feb 11– Jan 12)

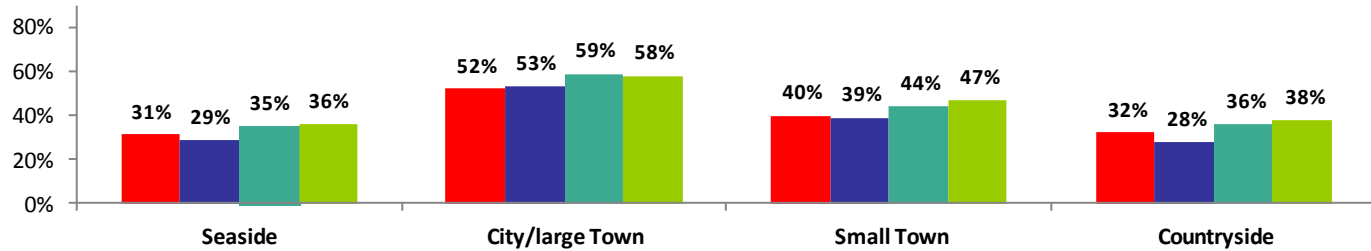


■ 2009 ■ 2010 ■ 2011 ■ 2012

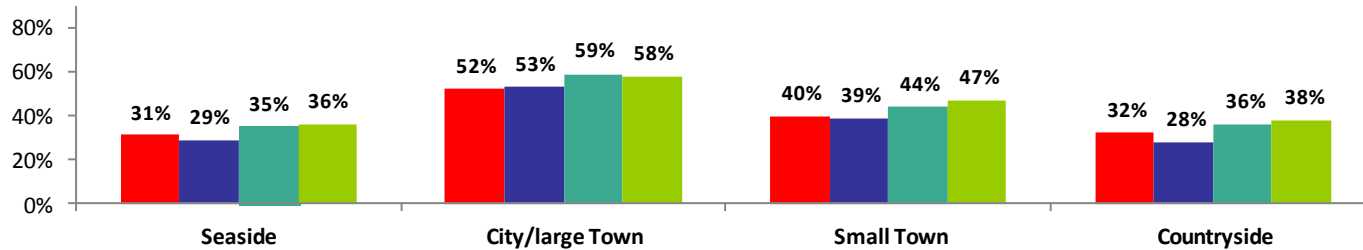
Location

Room Occupancy

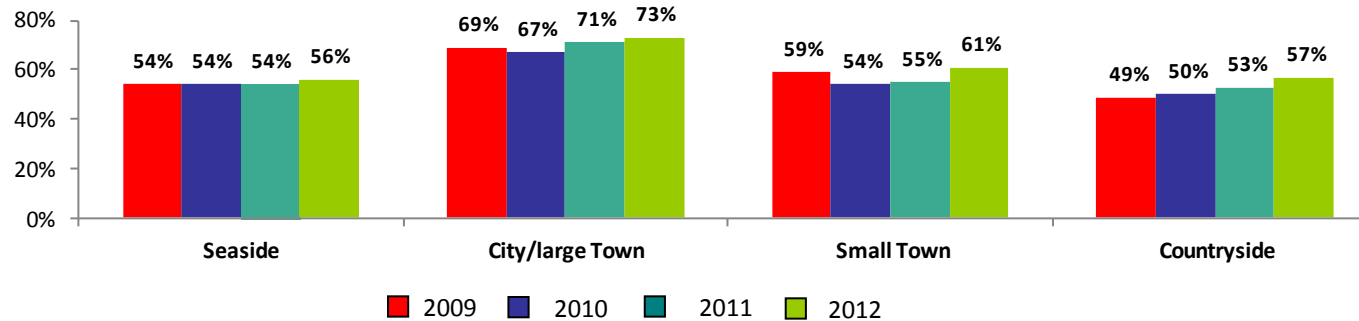
January 2012



Year to Date
(January 2012)



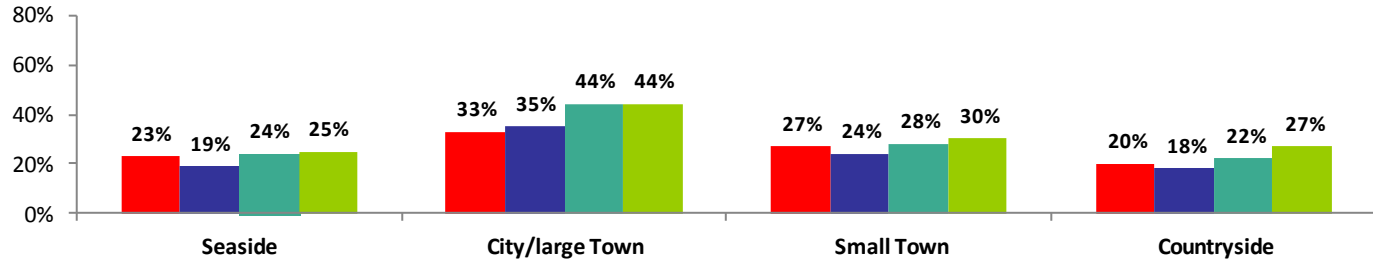
Past 12 months
(Feb 11– Jan 12)



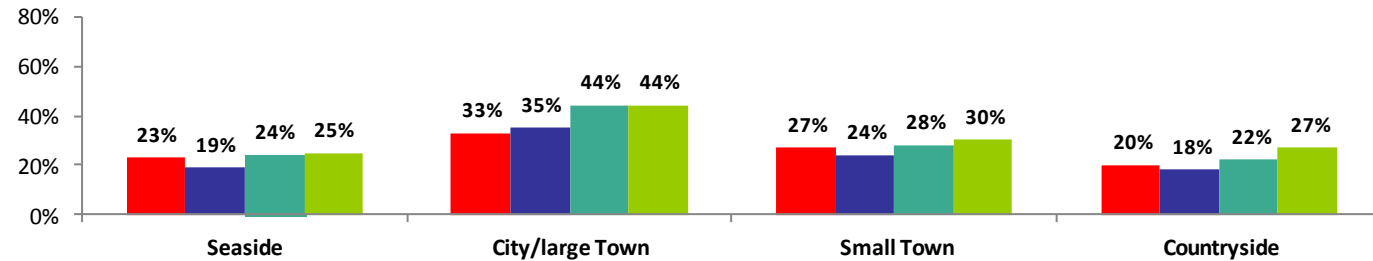
Location

Bedspace Occupancy

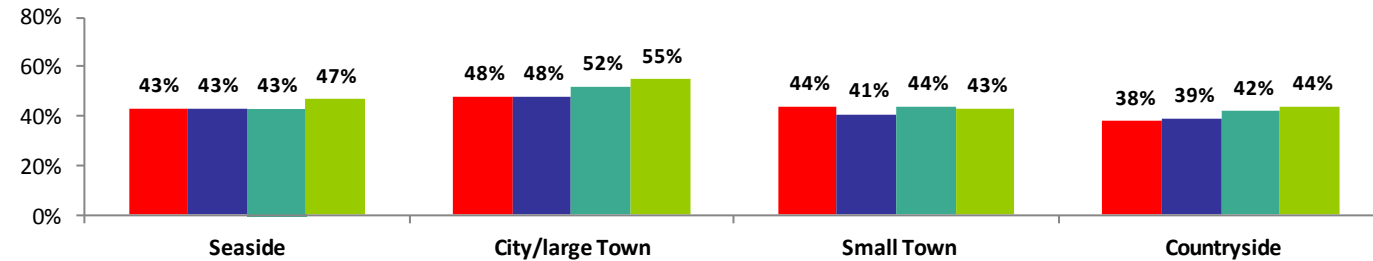
January 2012



Year to Date
(January 2012)



Past 12 months
(Feb 11 – Jan 12)

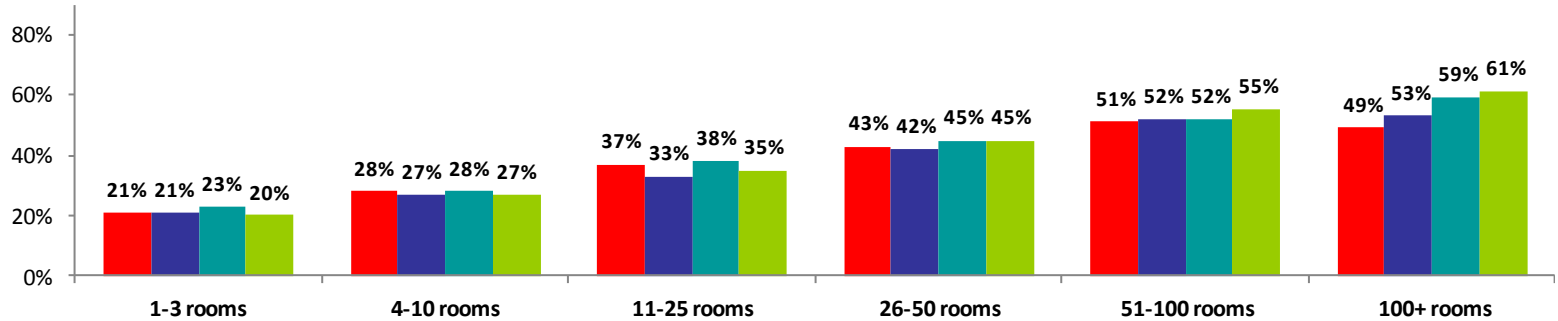


2009 2010 2011 2012

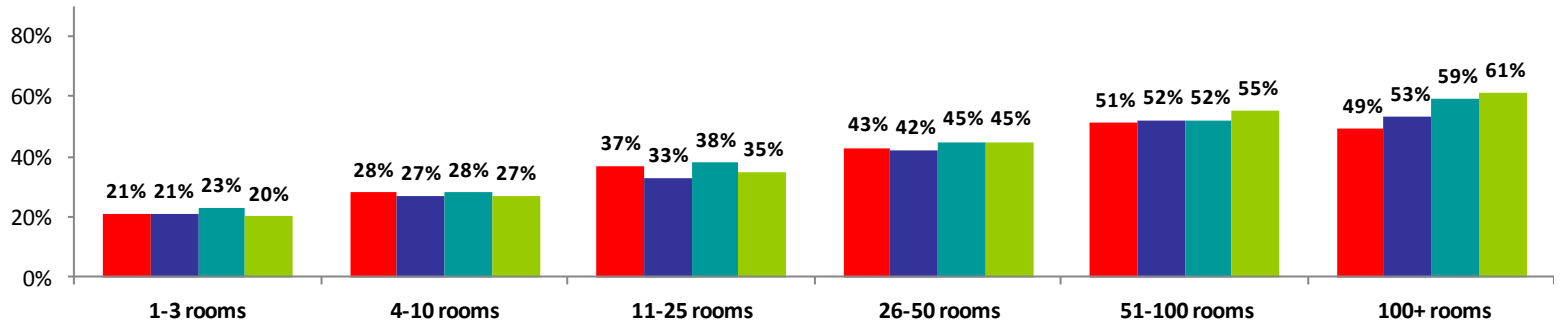
Number of Rooms

Room Occupancy

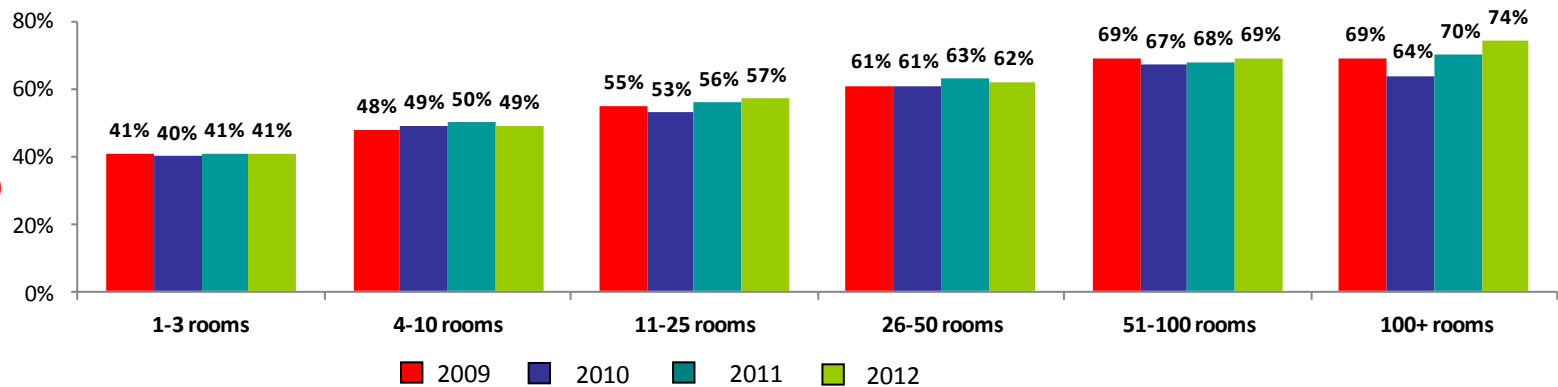
January 2012



Year to Date
(January 2012)



Past 12 Mths
(Feb 11- Jan 12)

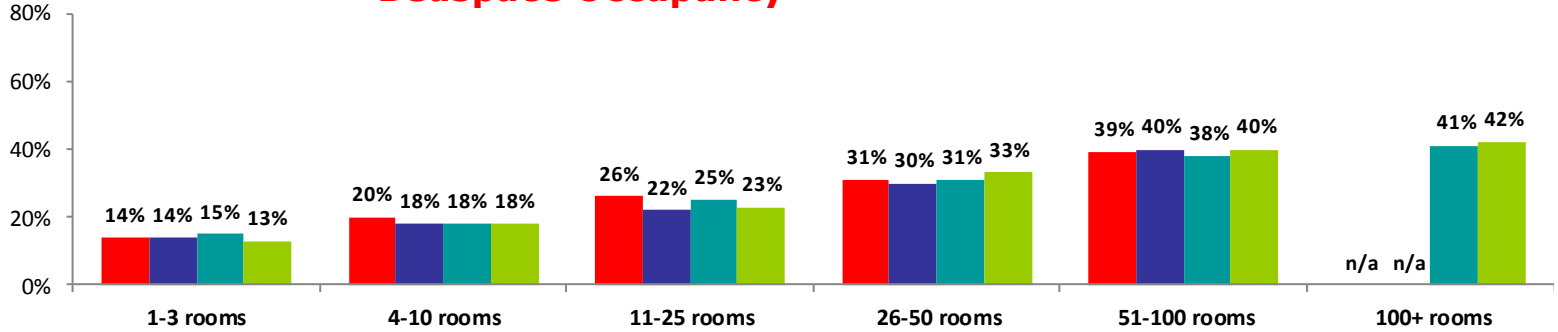


2009 2010 2011 2012

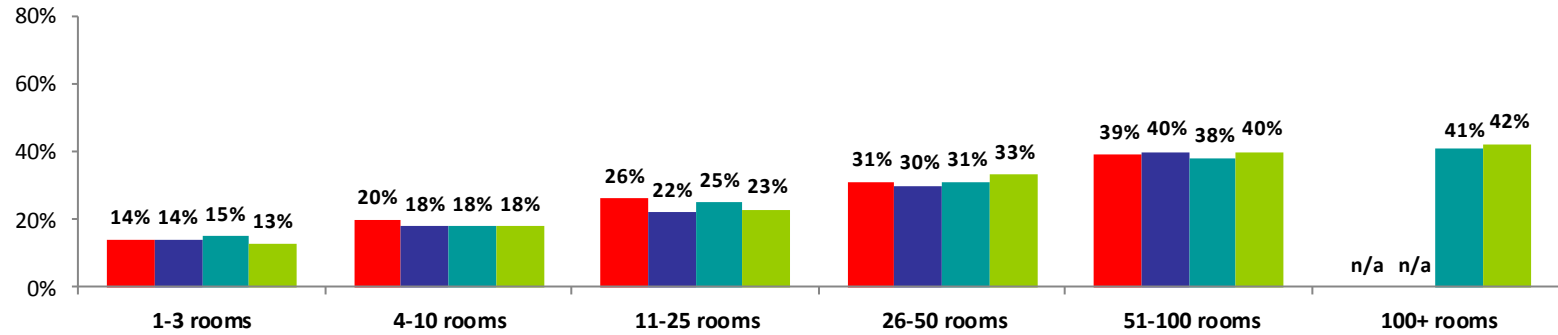
Number of Rooms

Bedspace Occupancy

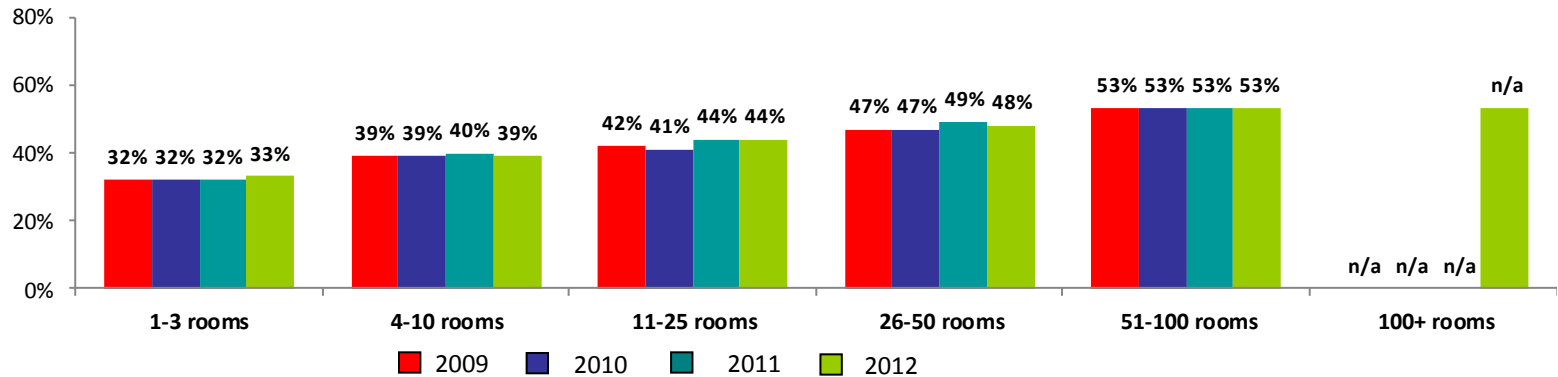
January 2012



Year to Date
(January 2012)



Past 12 Mths
(Feb 11– Jan 12)



2009 2010 2011 2012