

England Occupancy Survey

July 2012 Results

Note: Change in Occupancy Reporting

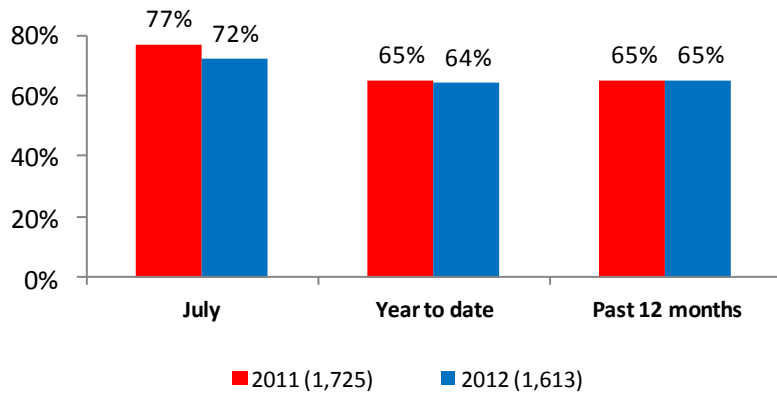
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas, business travellers vs. non business travellers).
- At present this data is only included in the single month analysis (July) 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 July 2012 (including data from STR Global)

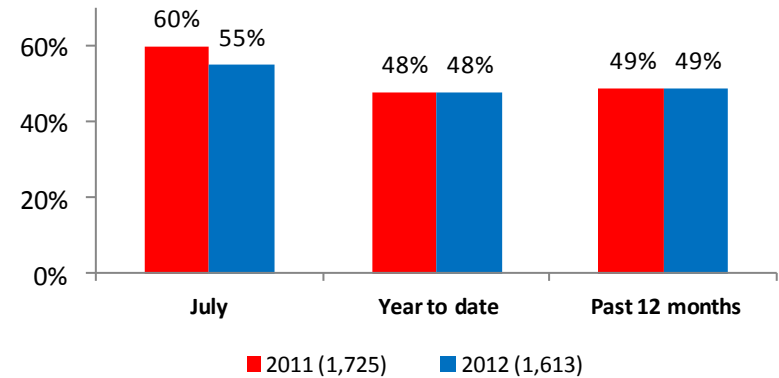
Monthly Update : July 2012

Across England as a whole both room and bed occupancy decreased by 5 percentage points compared with July 2011. Room occupancy levels for the year to date average fell slightly whereas the past 12 months remained static when compared with the previous year.

Room Occupancy



Bedspace Occupancy

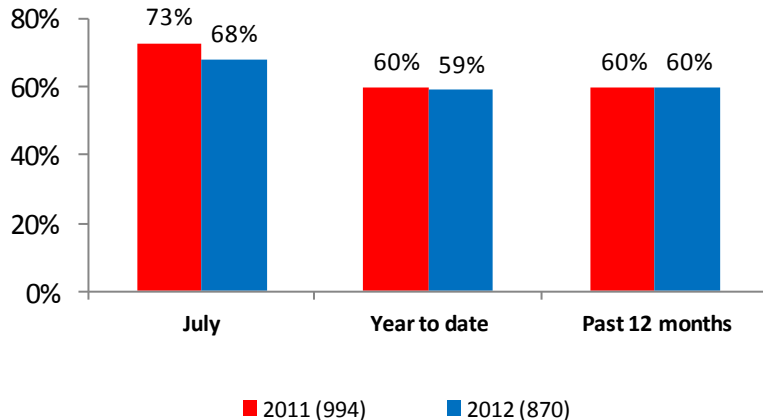


England Occupancy Reporting July 2012 (excluding data from STR Global)

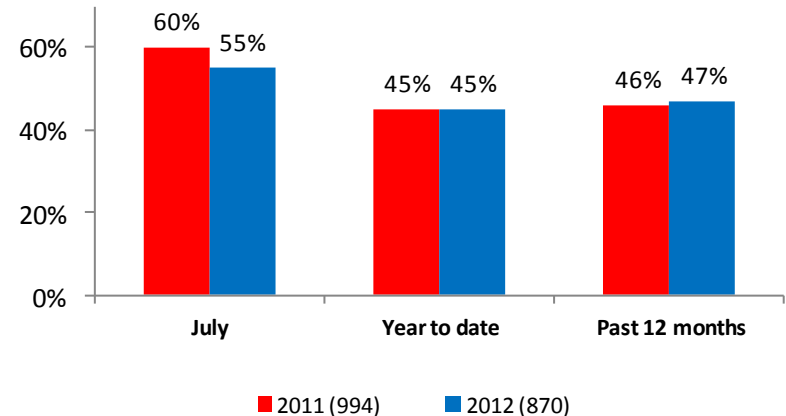
Monthly Update : July 2012

This update shows that in July 2012 England witnessed a decrease in both room and bed occupancy levels compared with July 2011. Room occupancy levels for the year to date average fell slightly when compared with the same period last year whilst bed occupancy remained static. Room occupancy levels in the past 12 months remained the same with bed occupancy witnessing a slight increase when compared with 2011.

Room Occupancy



Bedspace Occupancy

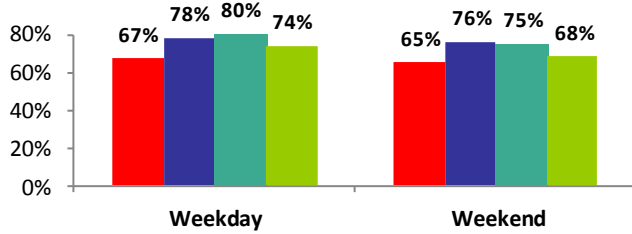


England Occupancy Reporting July 2012

- Occupancy levels during July 2012 witnessed a significant decrease of 5 percentage points in both room and bed occupancy when compared with the previous year.
- Across England as a whole weekday and weekend room and bed occupancy levels during July 2012 were below the levels achieved the previous year.
- Room occupancy levels for B&Bs had been steadily rising for the previous three years. However, this month's room occupancy witnessed a slight decline when compared to previous years. Both Hotel and Guesthouse saw a downturn in their occupancy levels in relation to preceding years.
- All locations within England in July 2012 have seen a fall in both room and bed occupancy levels. Small town saw a single percentage point drop which was the smallest fall in room occupancy. Countryside saw the biggest decrease in bed occupancy falling by 6 percentage points when compared to July 2011.
- Both room and bed occupancy levels across all size bands had decreased during this month when compared with previous years with the 26-50 size category seeing the smallest decrease across both room and bed occupancy.
- Occupancy levels are significantly down in July 2012 which may be due to a number of factors: The month of July and the summer as a whole was the wettest recorded in the UK for 100 years, this coinciding with the start of the London 2012 Olympics, meant trips across the UK as a whole were down as a result.

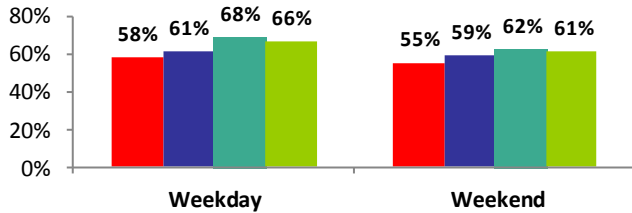
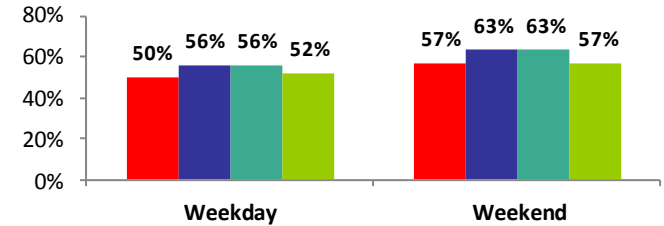
Weekday / Weekend

Room Occupancy

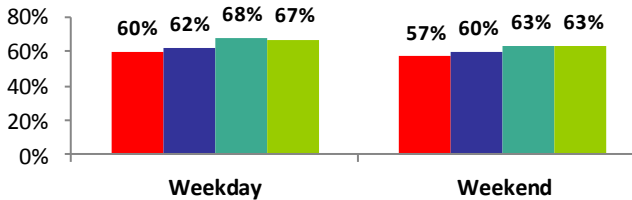
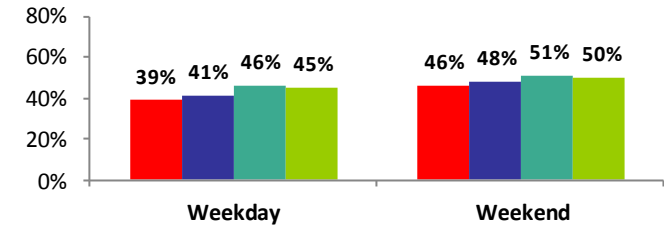


July 2012

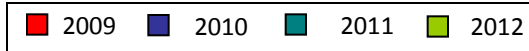
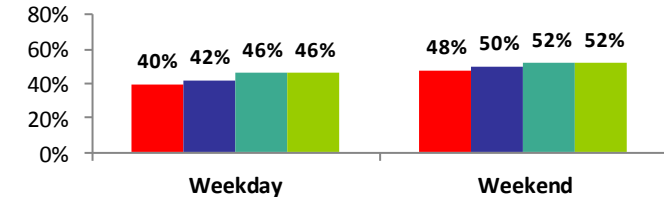
Bedspace Occupancy



Year to Date
(Jan 12 - Jul 12)



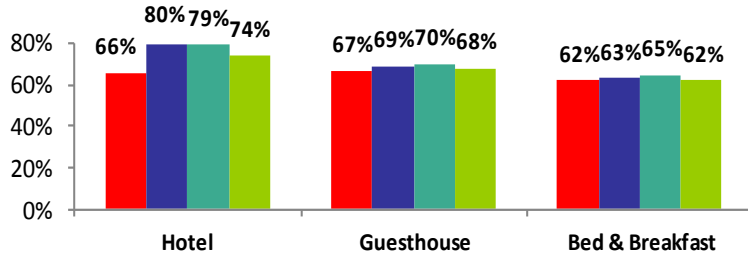
Past 12 Mths
(Aug 11 - Jul 12)



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

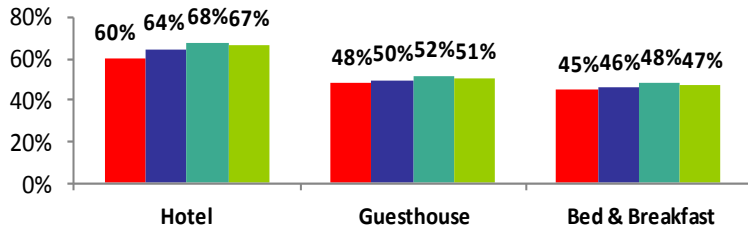
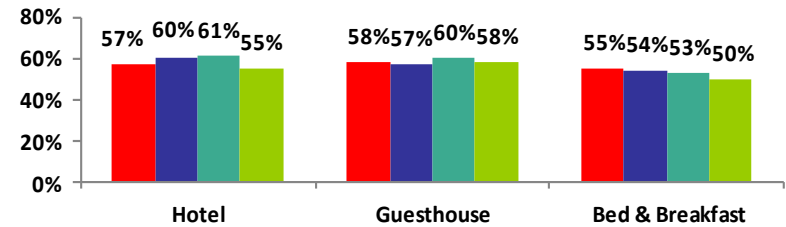
Establishment Type

Room Occupancy

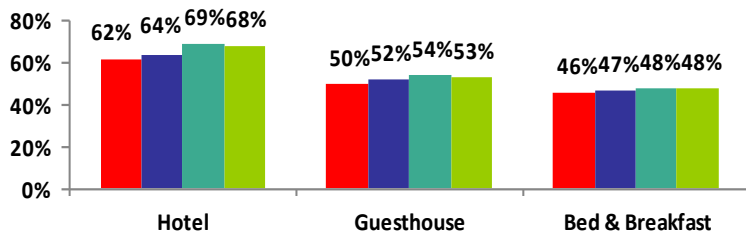
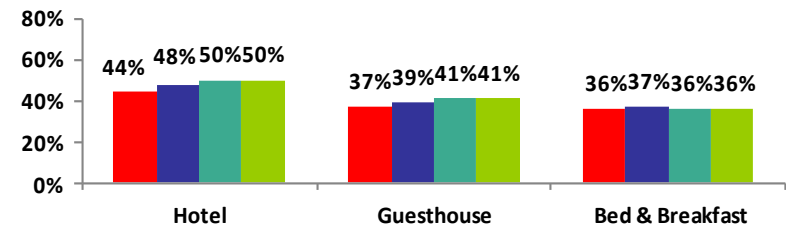


July 2012

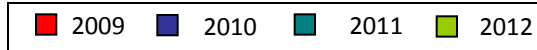
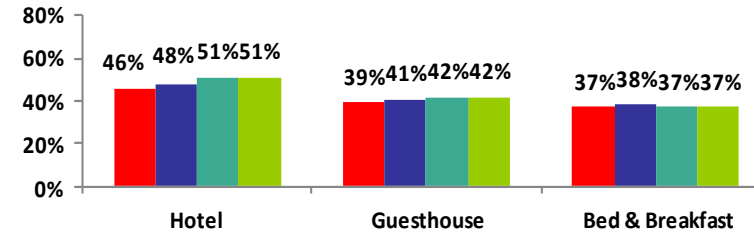
Bedspace Occupancy



Year to Date
(Jan 12 - Jul 12)



Past 12 Mths
(Aug 11 - Jul 12)

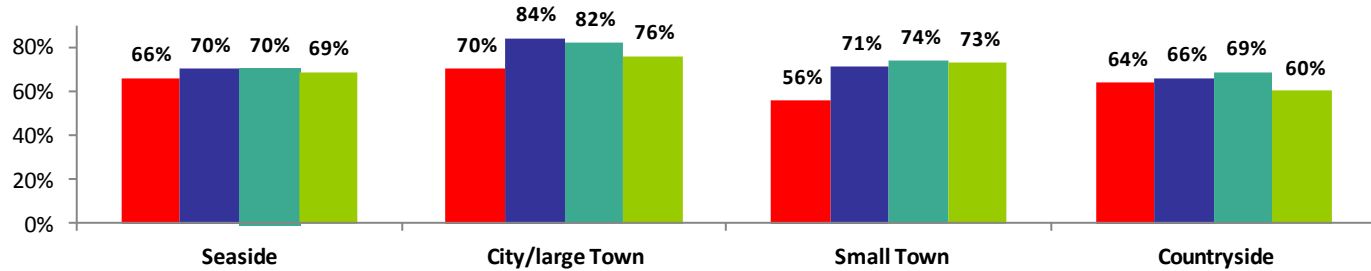


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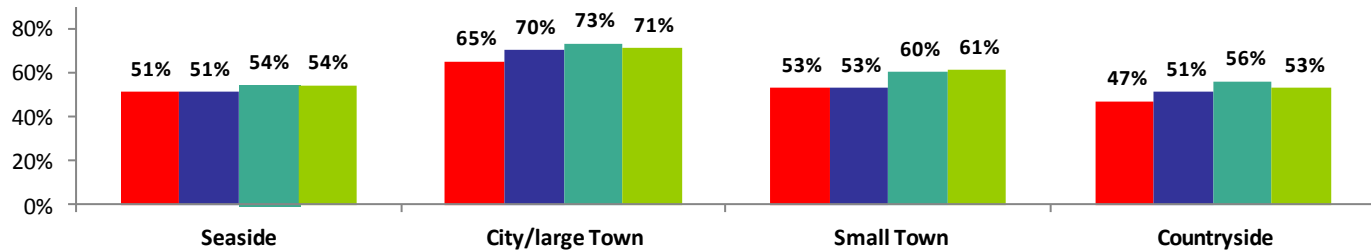
Location

Room Occupancy

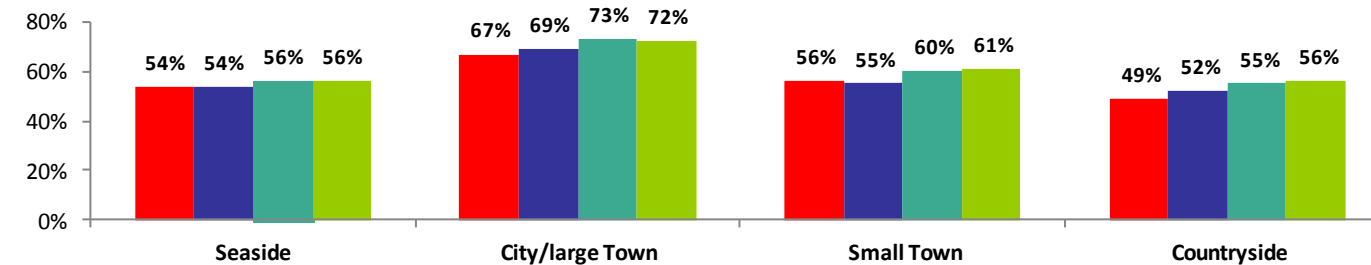
July 2012



Year to Date
(Jan 12 - Jul 12)



Past 12 months
(Aug 11- Jul 12)

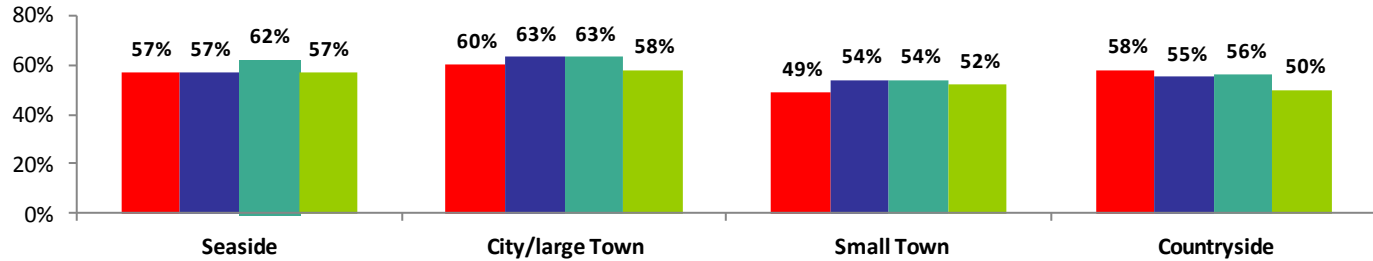


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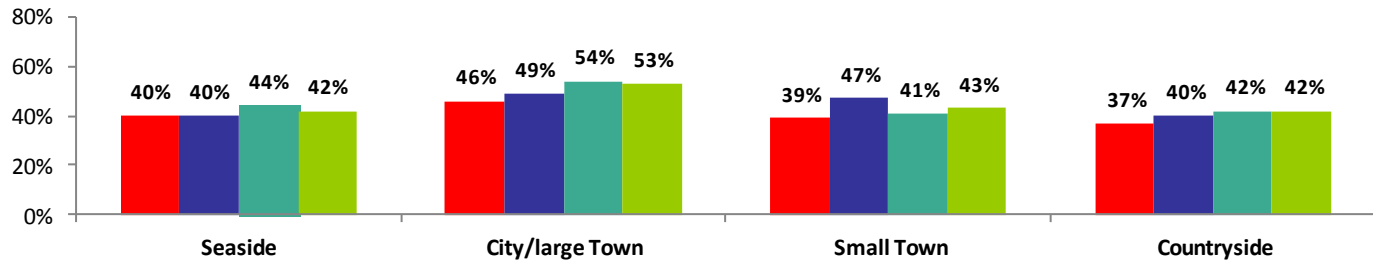
Location

Bedspace Occupancy

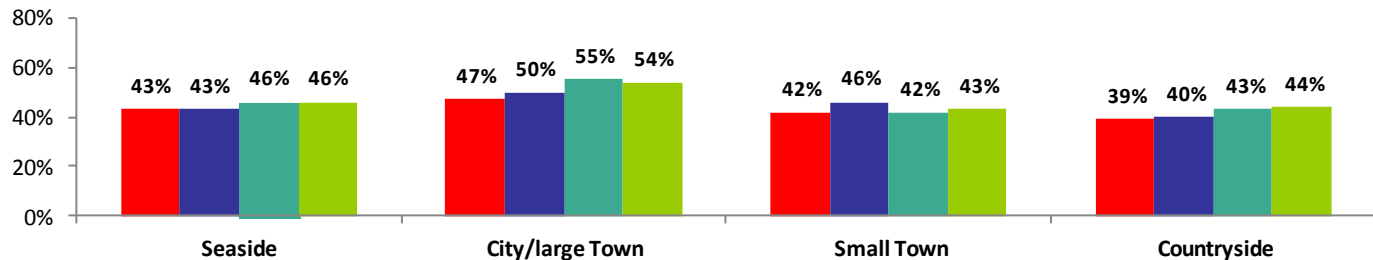
July 2012



Year to Date
(Jan 12 - Jul 12)



Past 12 months
(Aug 11- Jul 12)

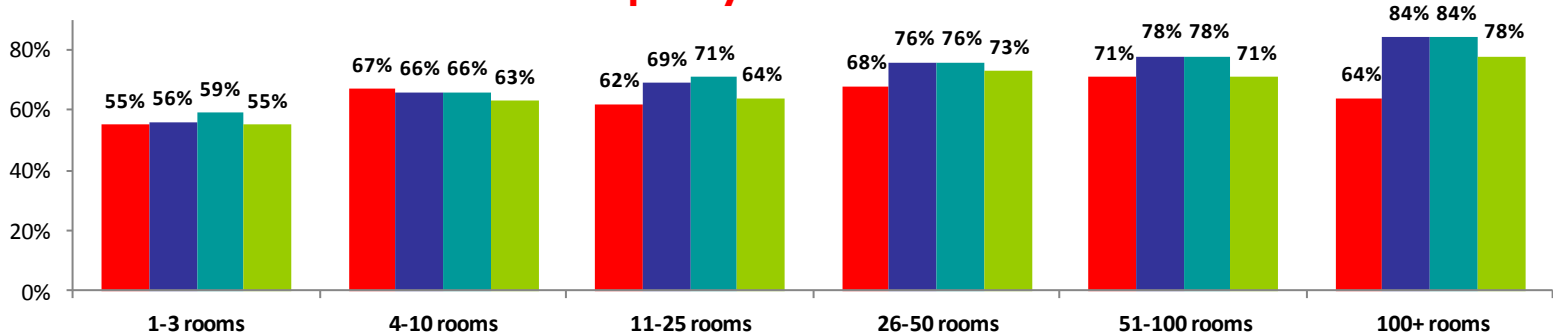


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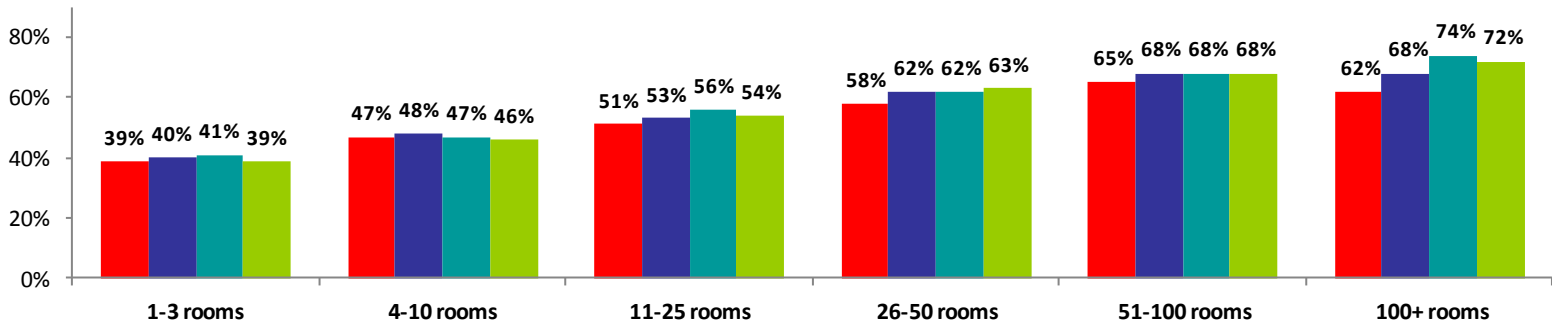
Number of Rooms

Room Occupancy

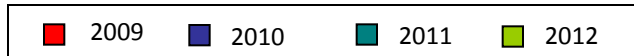
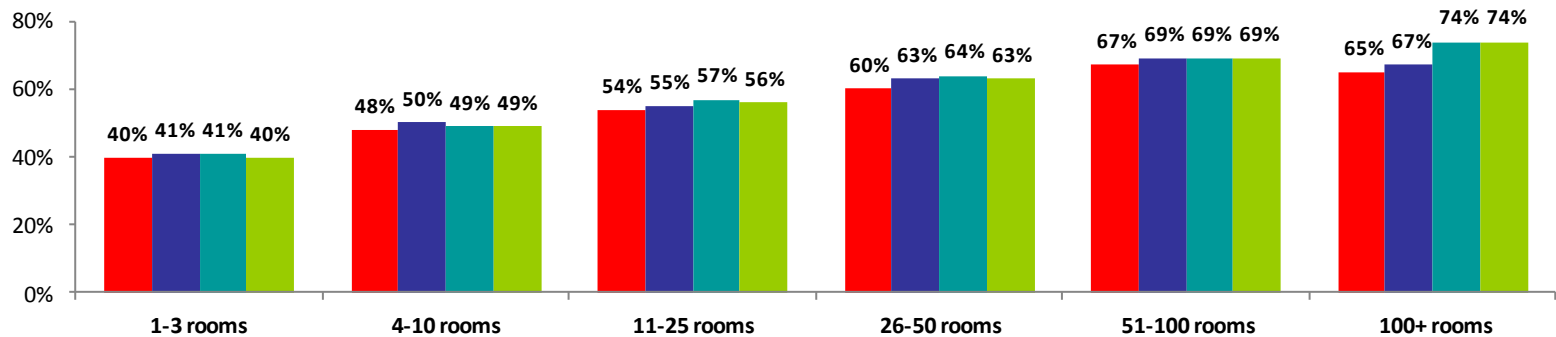
July 2012



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Past 12 Mths
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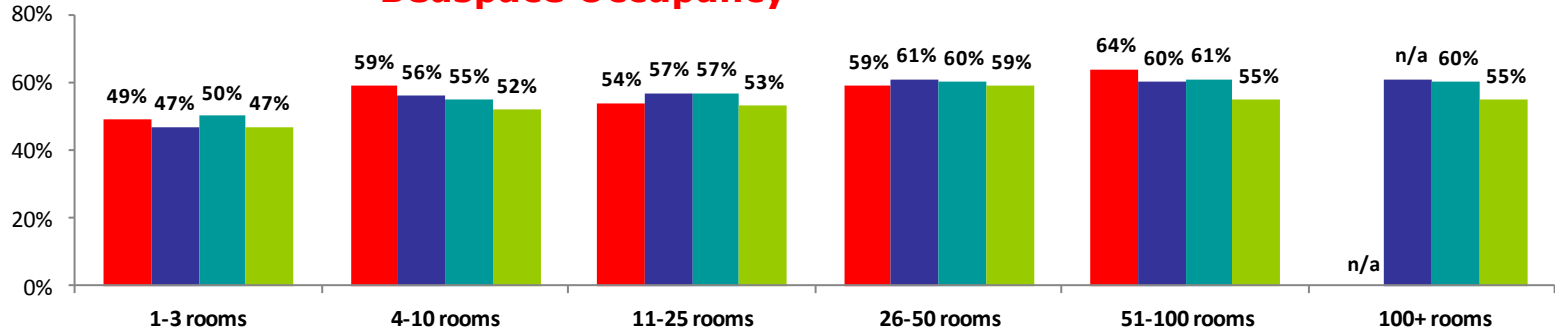


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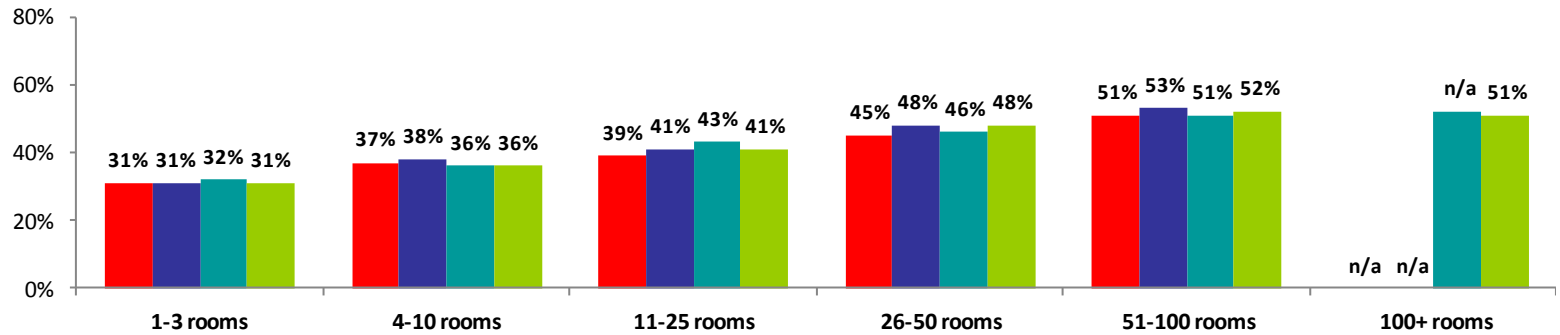
Number of Rooms

Bedspace Occupancy

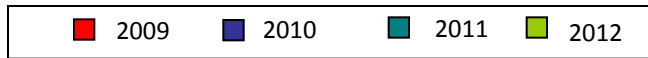
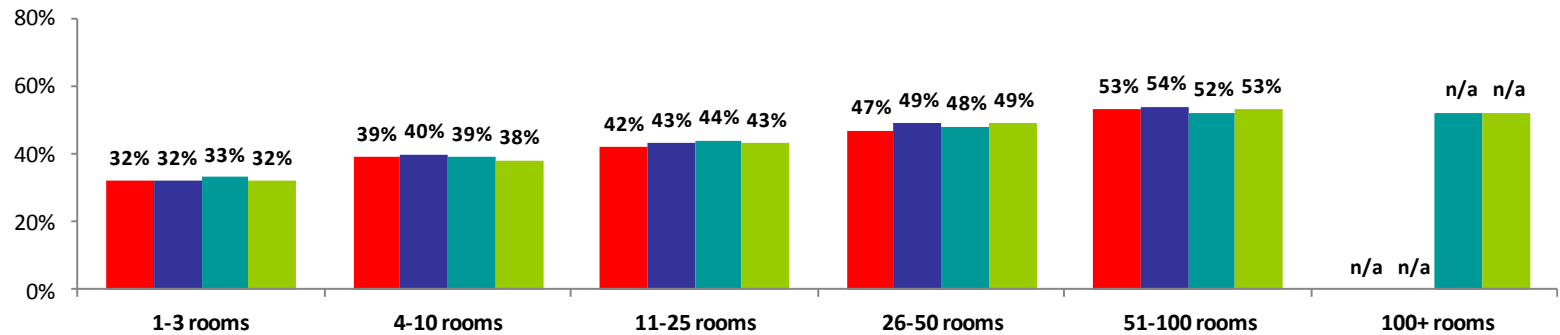
July 2012



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