

England Occupancy Survey

November 2012 Results

Note: Change in Occupancy Reporting

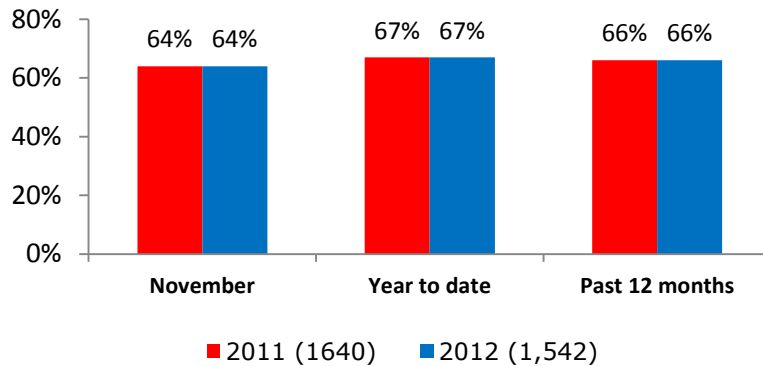
- In June 2010 a change was made to occupancy data.
- Syndicated data for c. 700 larger hotels with 100+ rooms provided by STR Global is now included in the overall England occupancy calculation.
- The data provided by STR Global includes occupancy and revenue but not guest type (i.e. UK vs. overseas,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

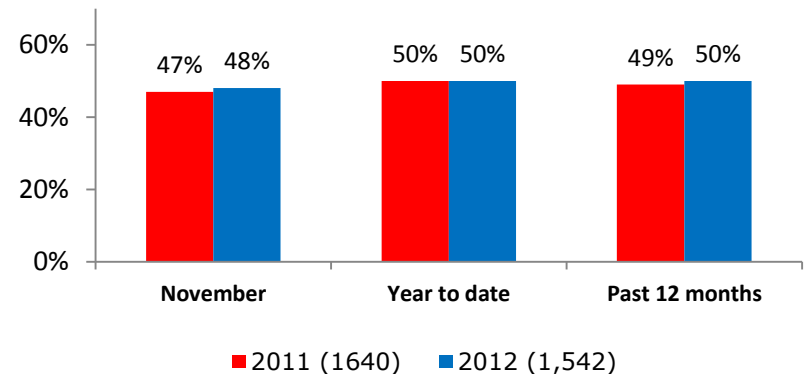
Monthly Update : November 2012

Room occupancy had remained static in November 2012 when compared with the previous year, although bedspace occupancy witnessed a slight increase. The year to date average in both room and bedspace occupancy remained on a par compared to November 2011. Past 12 months bedspace occupancy levels rose slightly whereas room occupancy remained the same.

Room Occupancy



Bedspace Occupancy

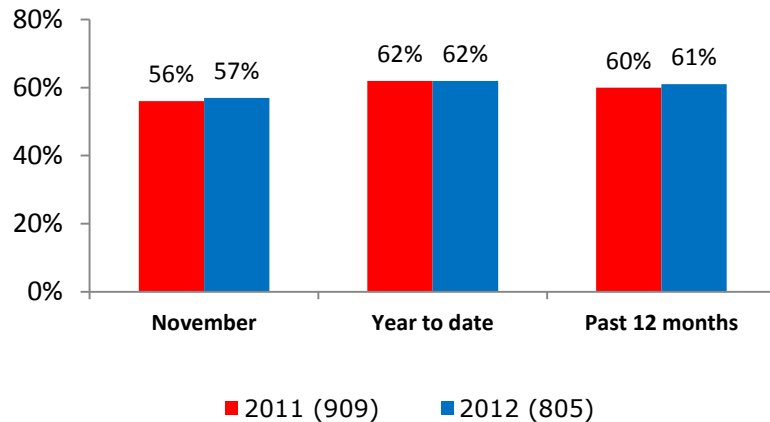


England Occupancy Reporting November 2012 (excluding data from STR Global)

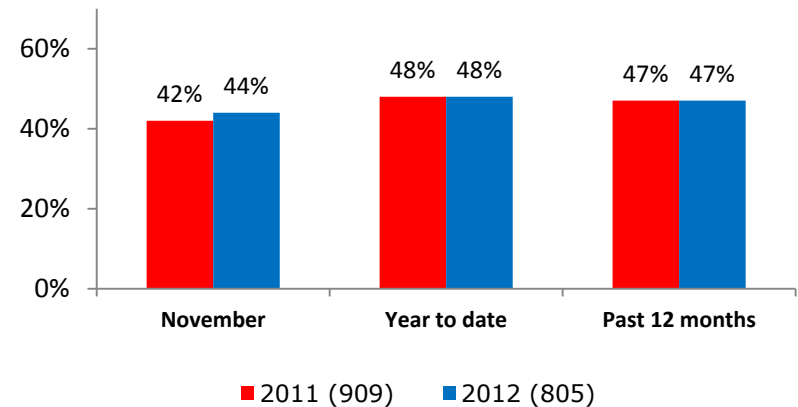
Monthly Update : November 2012

This update shows that in November 2012 both room and bed occupancy levels for England had risen slightly, 1 percentage point for room and 2 for bedspace occupancy, when compared to the same month in 2011. Both year to date room and bed occupancy levels mirrored those of November 2011. Room occupancy averages for the past 12 months saw a slight increase on the levels achieved in November 2011, whilst bedspace occupancy remained static with the same period last year.

Room Occupancy



Bedspace Occupancy

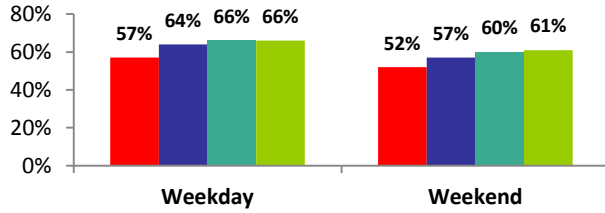


England Occupancy Reporting November 2012

- Across England as a whole, room occupancy levels in November 2012 had remained at the same level as the previous year although bedspace occupancy witnessed a slight increase during this month when compared with November 2011.
- Both measures of weekday occupancy levels had remained static when compared with November 2011. However, weekend room occupancy had risen slightly by 1 percentage point whilst weekend bedspace occupancy had dropped by the same amount during this period.
- Room and bed occupancy levels in the Hotel and guesthouse categories witnessed an increase in November 2012 compared with the levels achieved during November 2011. B&B establishments were at the same level as the previous year for room occupancy, with a 1 percentage point rise in bedspace occupancy. However when looking at the average for the year to date and the past twelve months, both room and bed occupancy had remained fairly static.
- Seaside, City/large towns and Small towns had all witnessed an increase in both room and bedspace occupancy with small towns up 5 percentage points in room occupancy and City/large towns increasing by 4 percentage points in bedspace occupancy. Countryside locations fared the worst with decreases in both room and bedspace occupancy levels compared with November 2011.
- With the exception of the 11-25 and 26-50 size bands, all other size categories had seen a decrease in room occupancy levels compared with November 2011. The 26-50 room size band increased by 8 percentage points during this month compared with the same period in 2011. Bedspace occupancy had risen in four out of the six size bands with the largest increase in the 51-100 size band rising by 4 percentage points in November 2012.

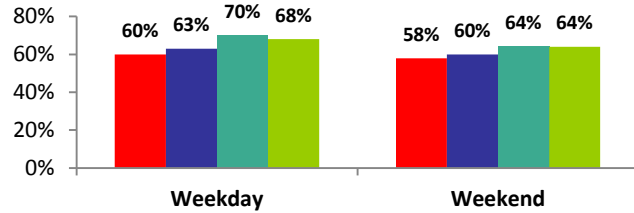
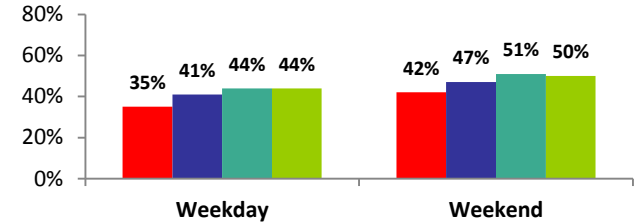
Weekday / Weekend

Room Occupancy

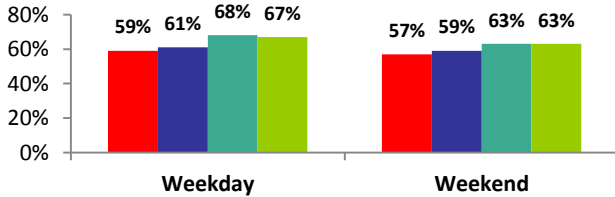
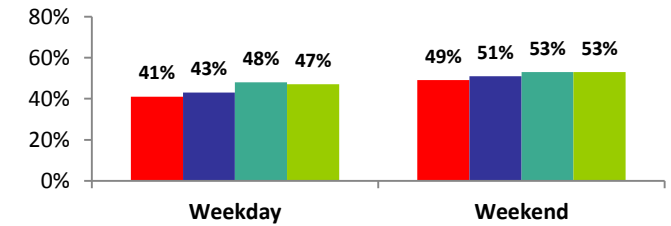


November 2012

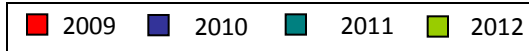
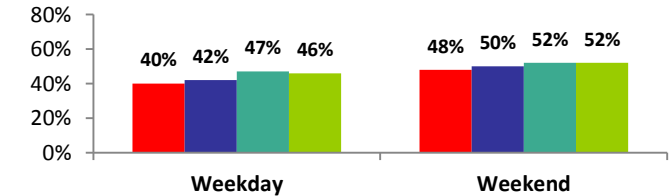
Bedspace Occupancy



Year to Date
(Jan 12 - Nov 12)

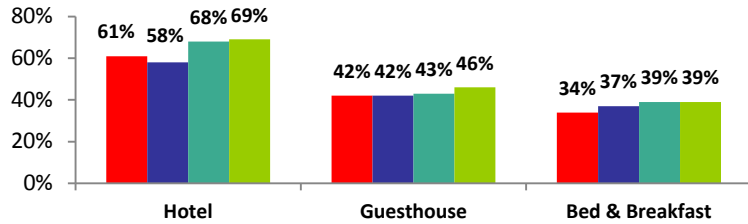


Past 12 Mths
(Dec 11 - Nov 12)



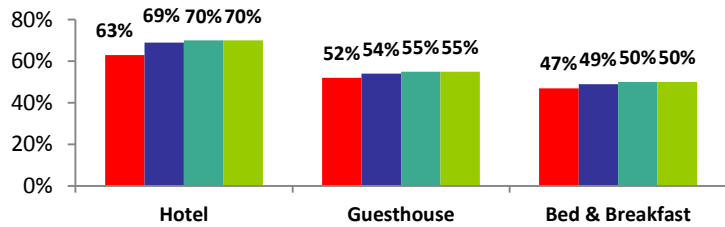
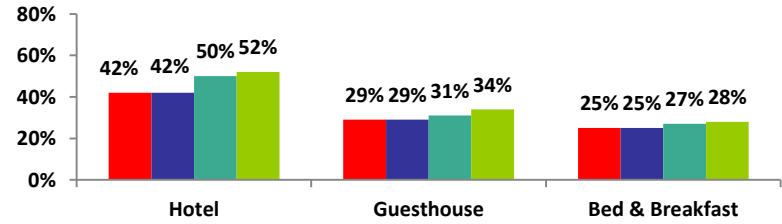
Establishment Type

Room Occupancy

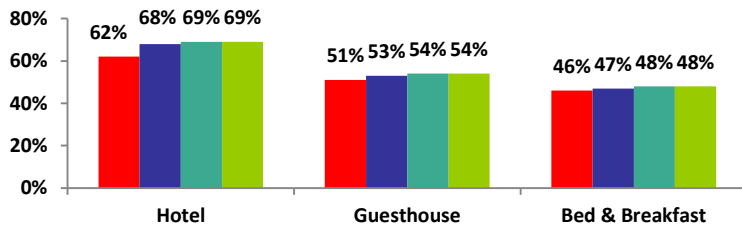
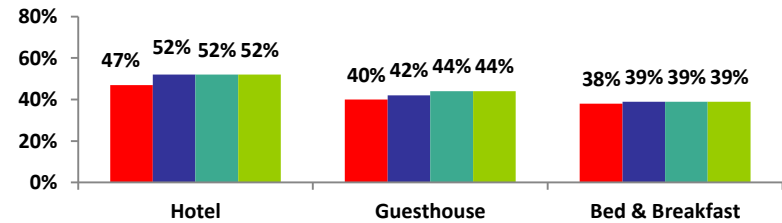


**November
2012**

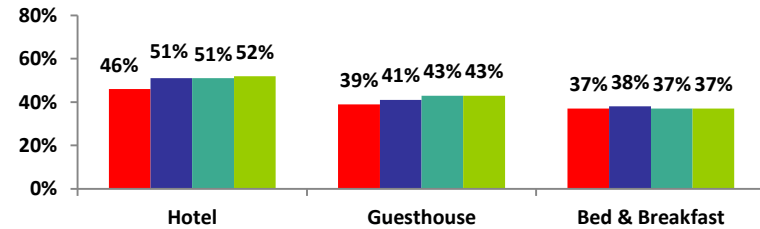
Bedspace Occupancy



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



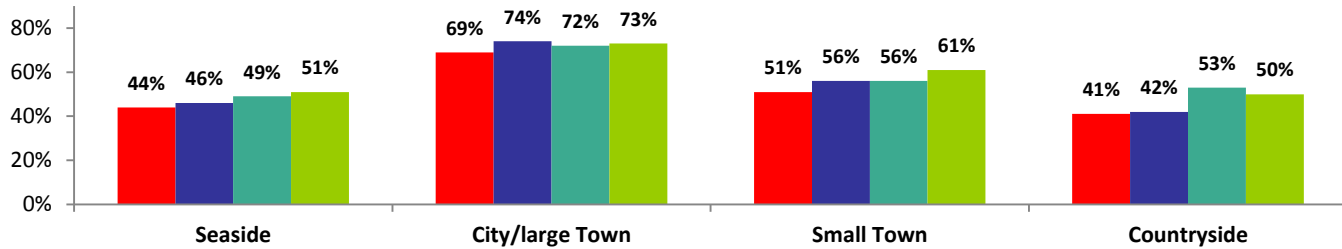
**Past 12 Mths
(Dec 11 - Nov 12)**



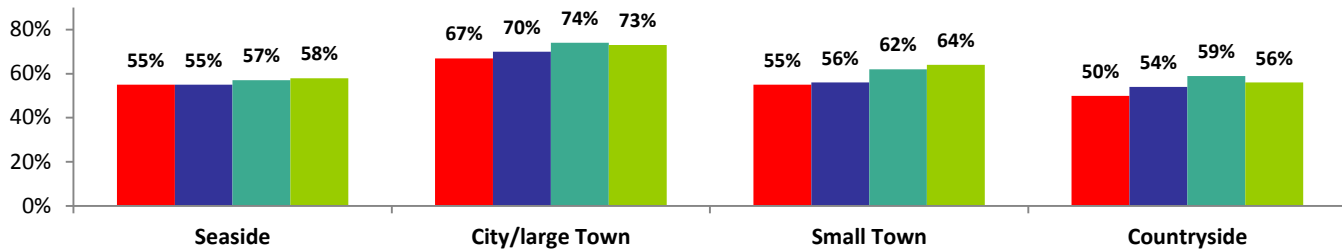
Location

Room Occupancy

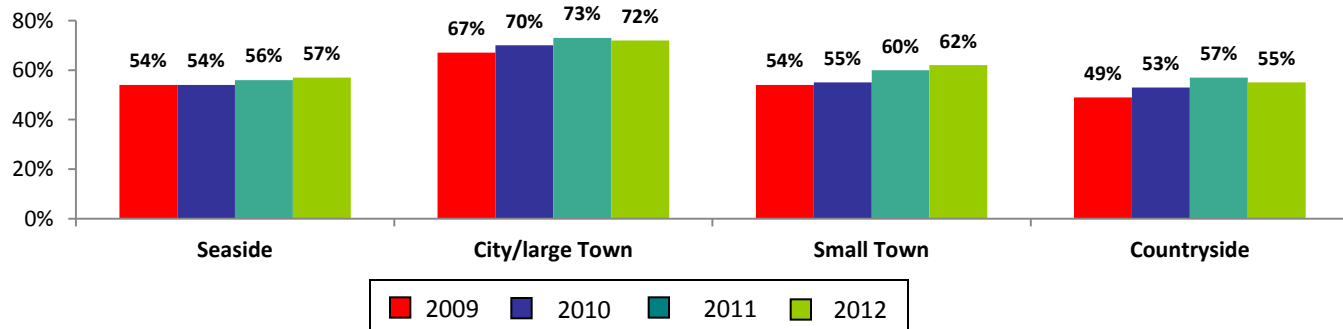
**November
2012**



**Year to Date
(Jan 12 – Nov 12)**



**Past 12 months
(Dec 11 – Nov 12)**

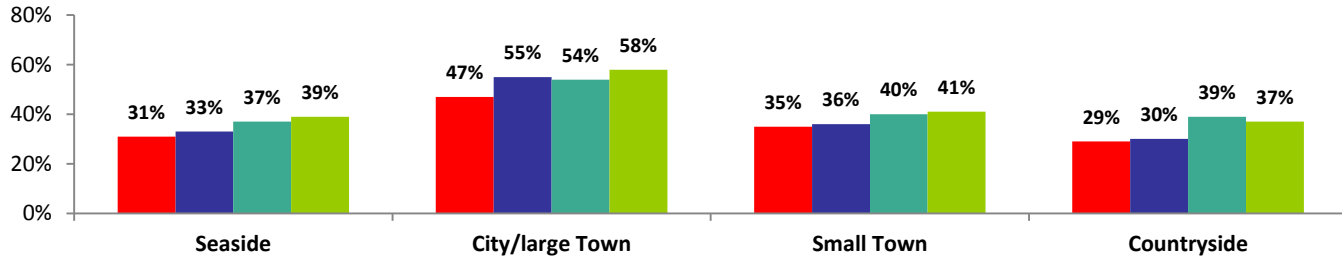


STR data is included in the year to date for 2011 and 2012 and the past 12 months for May-December 2011 data and 2012 data

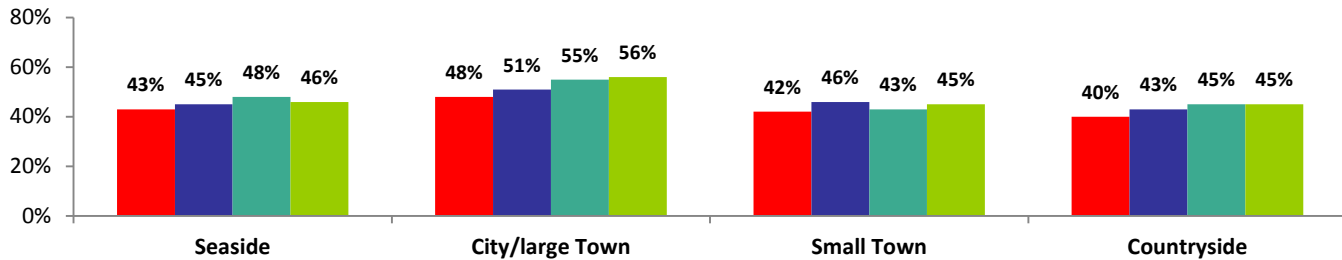
Location

Bedspace Occupancy

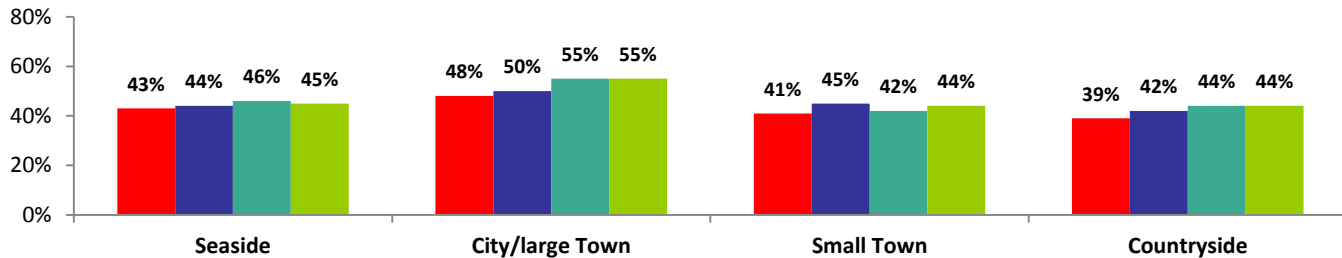
**November
2012**



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



**Past 12 months
(Dec 11 - Nov 12)**

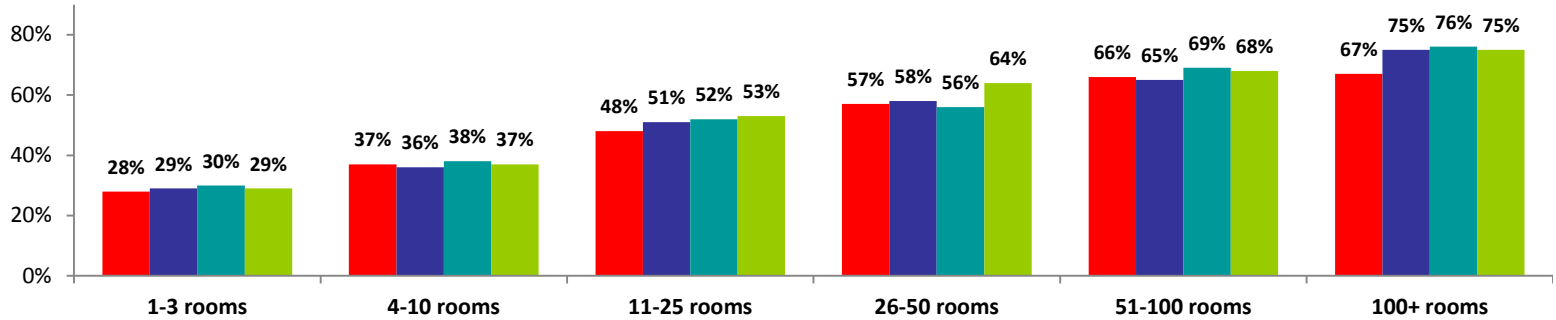


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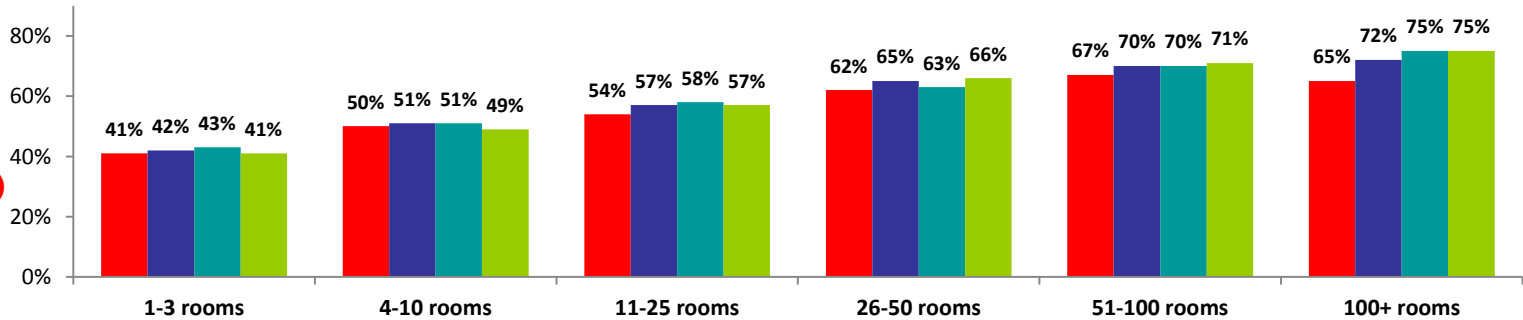
Number of Rooms

Room Occupancy

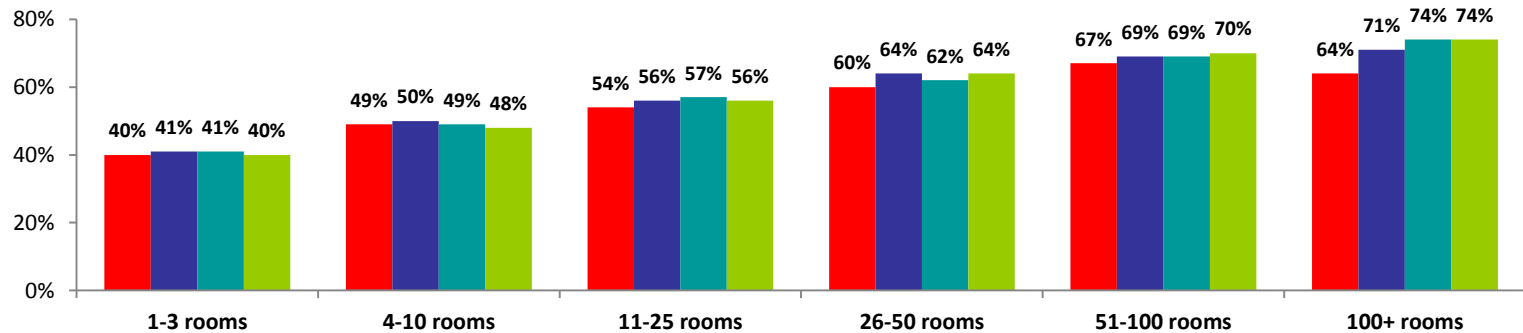
November 2012



Year to Date (Jan 12 - Nov 12)



Past 12 Mths (Dec 11 - Nov 12)

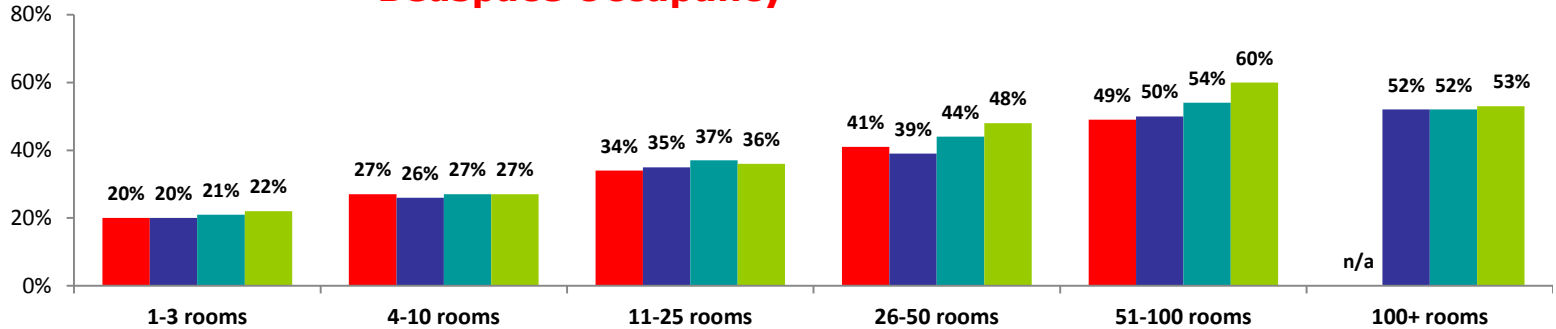


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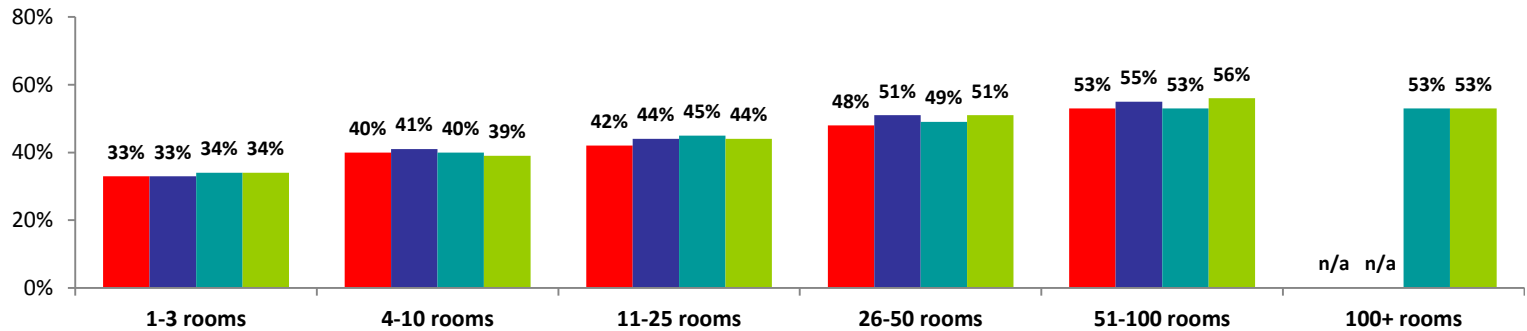
Number of Rooms

Bedspace Occupancy

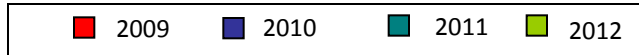
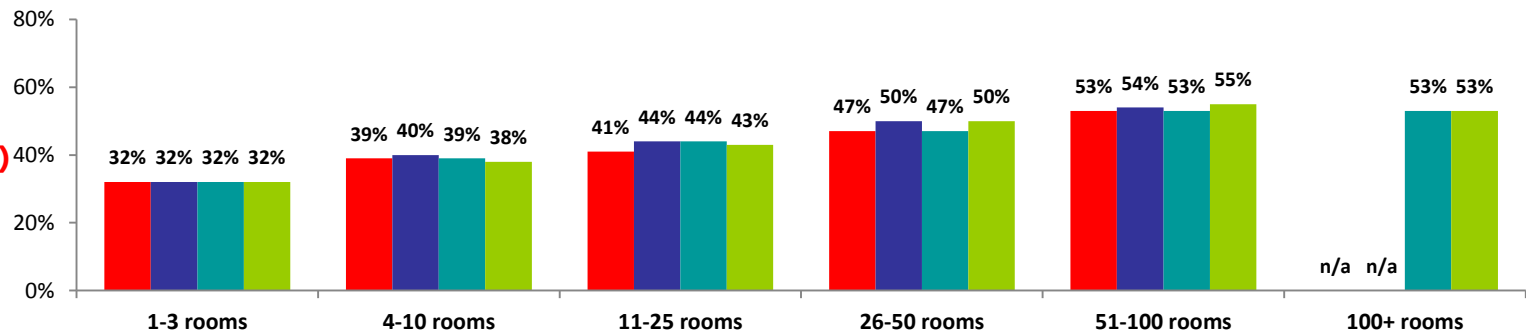
November 2012



Year to Date (Jan 12-Nov 12)



Past 12 Mths (Dec 11 - Nov 12)



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