

England Occupancy Survey

November 2018 Results



Summary of Results

Room occupancy in November increased by +1% to 79% whilst **bedspace occupancy** increased by +2% to 55% when compared to November 2017. In November there was an increase of +2.0% in **room supply** and an increase of +3.2% in **demand** when compared to the same month in 2017.

RevPar, which is the total room revenue divided by the total number of available rooms, increased by +3% in November to £77.26 compared to the previous year.

City/large town room occupancy increased by +1% to 81% whilst **bedspace occupancy** increased by +1% to 55%. **Seaside** room occupancy increased by +2% to 71%, whilst **bedspace occupancy** increased by +2% to 52%. **Small town** room occupancy increased

by +1% to 71% and increased by +1% for **bedspace occupancy** to 51%, whilst **countryside** room occupancy increased by +1% to 62% and **bedspace occupancy** increased by +1% to 42%.

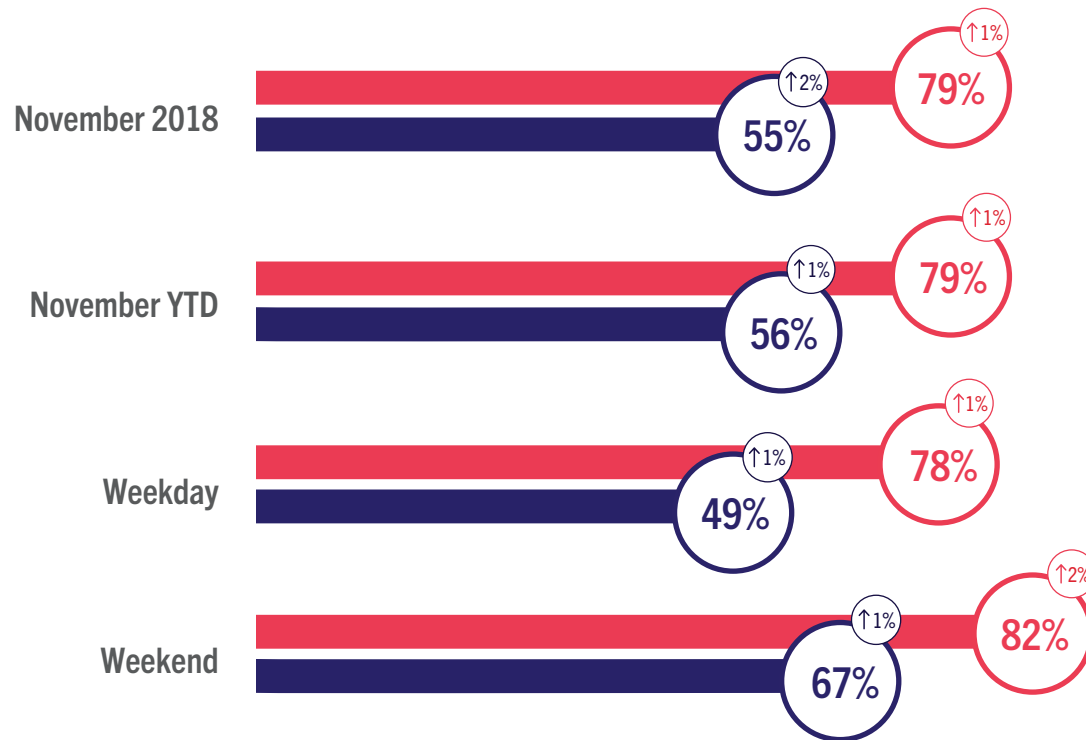
Looking at occupancy rates by **establishment** size, establishments with 101+ rooms were the only type to increase in both room and **bedspace occupancy** levels, increasing by +1% for both measures.

Looking at occupancy rates by **region**, the biggest shift came from Greater London, who increased by +3% in room occupancy and +2% in **bedspace occupancy**. East Midlands saw the next greatest increase in room occupancy levels, increasing by +2%, and the region also rose by +1% in **bedspace occupancy** compared to November 2017.

England Room and Bedspace Occupancy

At a glance - November 2018

● Room Space ● Bedspace ⓘ % Change



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
November	79%	78%	79%
November YTD	78%	78%	79%
Weekday	78%	77%	78%
Weekend	82%	80%	82%

Bedspace Occupancy	2016	2017	2018
November	54%	53%	55%
November YTD	55%	55%	56%
Weekday	49%	49%	49%
Weekend	68%	67%	67%

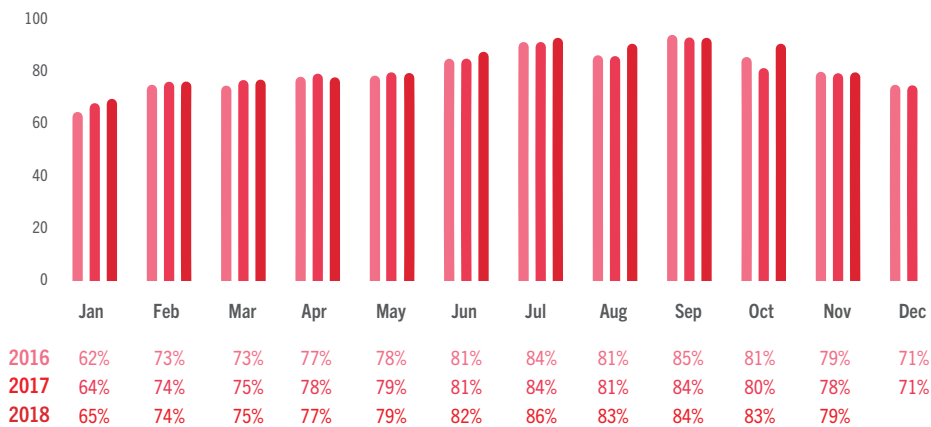
	2016	2017	2018
Room supply	1.4%	1.9%	2.0%
Room demand	4.4%	0.3%	3.2%

Table to the left shows the room supply and room demand year on year relative percentage change.

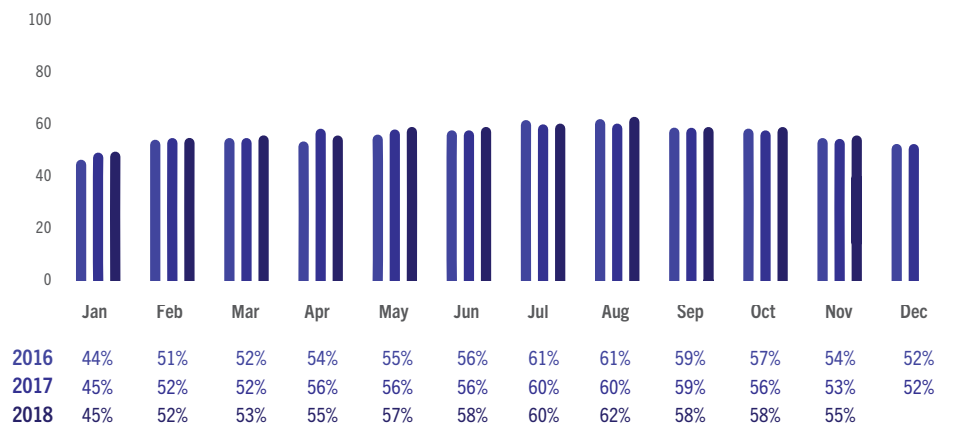


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



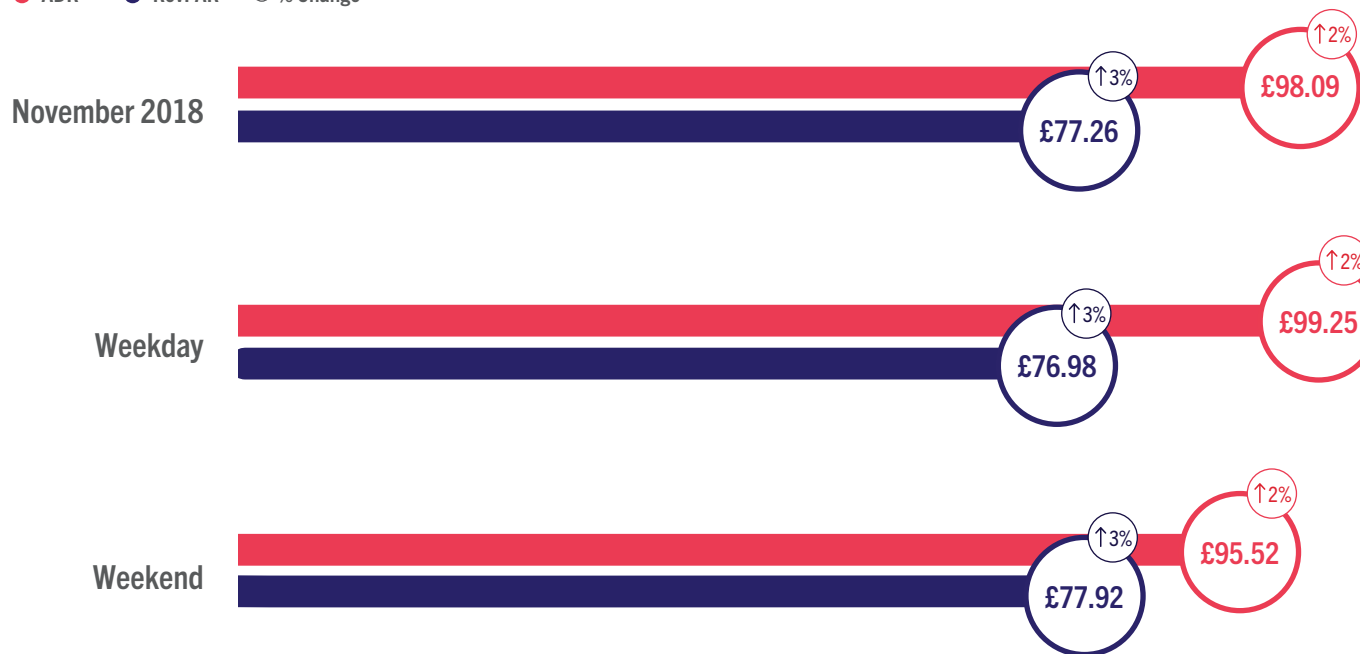
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - November 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
November	£95.06	£96.29	£98.09
Weekday	£95.90	£97.12	£99.25
Weekend	£92.88	£94.09	£95.52

RevPAR

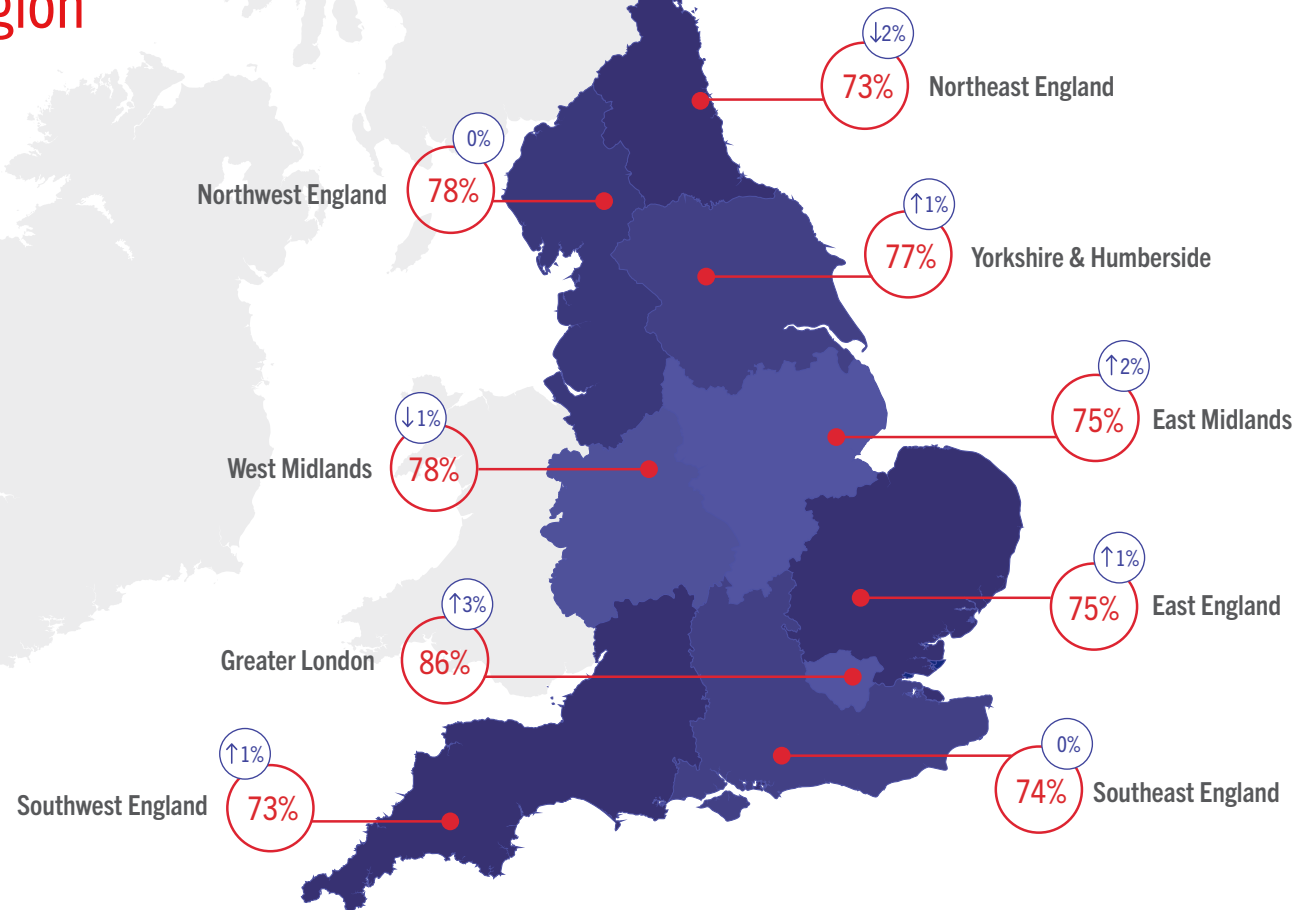
	2016	2017	2018
November	£75.17	£74.91	£77.26
Weekday	£74.73	£74.69	£76.98
Weekend	£76.37	£75.51	£77.92



Room Occupancy By Region

At a glance - November 2018

*The figures represented within the graphic contain the current month and year occupancy figures as well as the year on year relative percentage change figures.



Occupancy By Region

Data Tables

Room Occupancy	2016	2017	2018
East England	77%	75%	75%
East Midlands	75%	74%	75%
Greater London	86%	84%	86%
Northeast England	72%	75%	73%
Northwest England	79%	78%	78%
Southeast England	75%	74%	74%
Southwest England	73%	72%	73%
West Midlands	78%	79%	78%
Yorkshire & Humberside	78%	76%	77%

Bedspace Occupancy	2016	2017	2018
East England	53%	51%	53%
East Midlands	51%	50%	51%
Greater London	60%	59%	61%
Northeast England	50%	51%	51%
Northwest England	54%	54%	54%
Southeast England	51%	50%	51%
Southwest England	50%	49%	50%
West Midlands	52%	52%	52%
Yorkshire & Humberside	54%	53%	55%

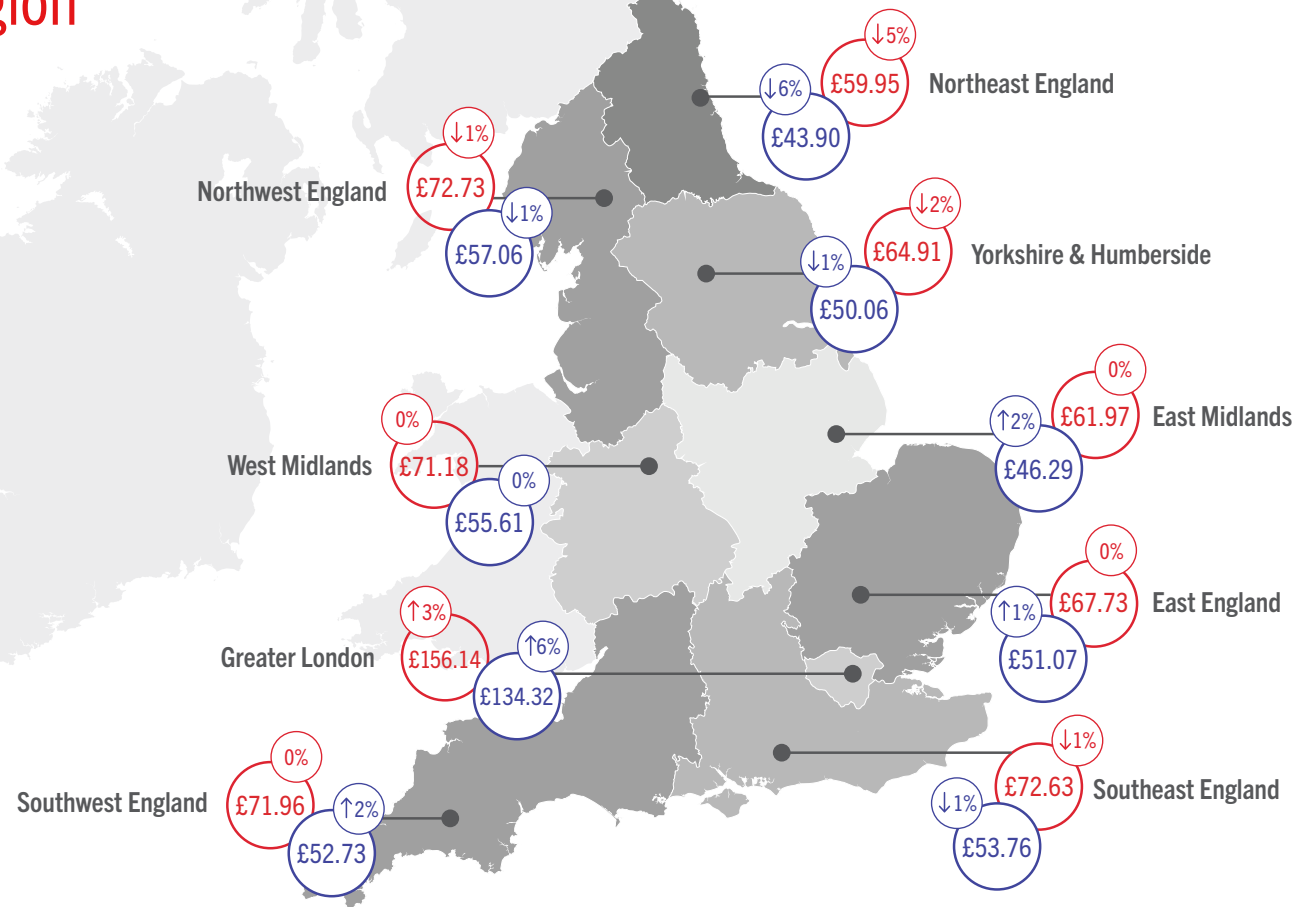


ADR and RevPAR By Region

At a glance - November 2018

*The figures represented within the graphic contain the current month and year revenue figures as well as the year on year relative percentage change figures.

● ADR ● RevPAR ⓘ % Change



ADR and RevPAR By Region

Data Tables

ADR	2016	2017	2018
East England	£66.78	£67.49	£67.73
East Midlands	£60.88	£61.96	£61.97
Greater London	£150.58	£152.00	£156.14
Northeast England	£61.39	£62.90	£59.95
Northwest England	£71.46	£73.23	£72.73
Southeast England	£73.29	£73.51	£72.63
Southwest England	£69.91	£71.71	£71.96
West Midlands	£68.67	£70.95	£71.18
Yorkshire & Humberside	£64.03	£66.39	£64.91

RevPAR	2016	2017	2018
East England	£51.23	£50.35	£51.07
East Midlands	£45.88	£45.56	£46.29
Greater London	£129.63	£127.12	£134.32
Northeast England	£44.44	£46.95	£43.90
Northwest England	£56.15	£57.36	£57.06
Southeast England	£54.82	£54.23	£53.76
Southwest England	£51.37	£51.89	£52.73
West Midlands	£53.76	£55.75	£55.61
Yorkshire & Humberside	£49.96	£50.74	£50.06



Room Occupancy By Destination Type

At a glance - November 2018



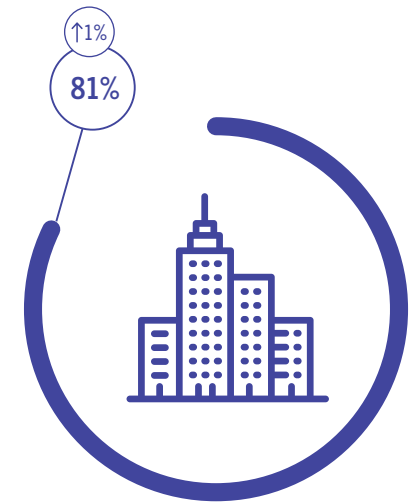
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2016	2017	2018
City / Large Town	81%	80%	81%
Small Town	71%	70%	71%
Countryside	64%	62%	62%
Seaside	69%	69%	71%

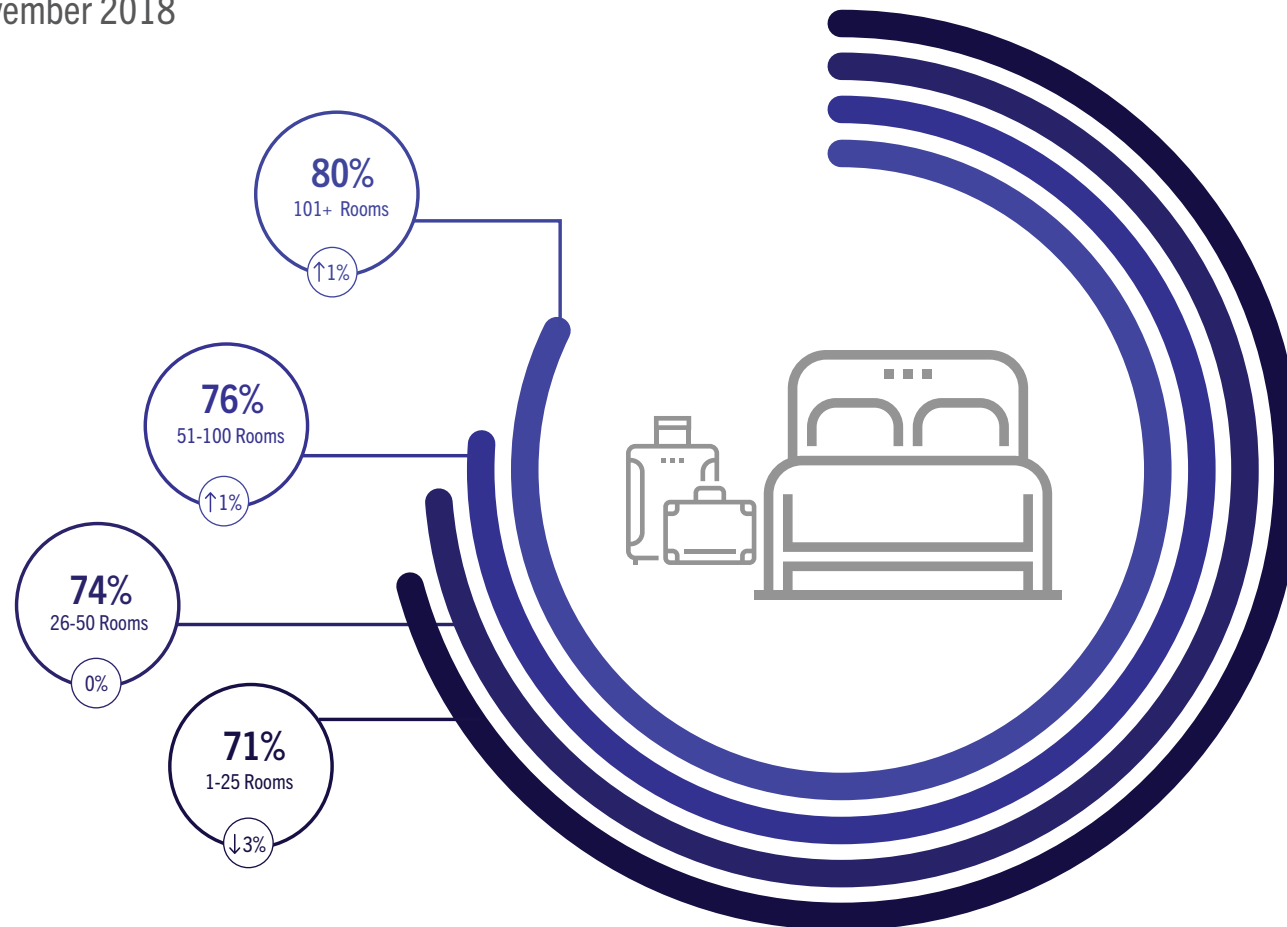
Bedspace Occupancy

	2016	2017	2018
City / Large Town	55%	54%	55%
Small Town	50%	50%	51%
Countryside	42%	41%	42%
Seaside	49%	50%	52%



Room Occupancy By Number of Rooms

At a glance - November 2018





Occupancy By Number of Rooms

Data Tables

Room Occupancy

	2016	2017	2018
1-25 Rooms	75%	73%	71%
26-50 Rooms	73%	74%	74%
51-100 Rooms	76%	76%	76%
101+ Rooms	81%	79%	80%

Bedspace Occupancy

	2016	2017	2018
1-25 Rooms	53%	51%	50%
26-50 Rooms	51%	52%	52%
51-100 Rooms	55%	55%	55%
101+ Rooms	55%	54%	55%



Methodology Statement

In July 2017 a change of suppliers was made to the occupancy data. The data is now collected via a syndicated panel of over 3000 hotels and other accommodation businesses provided by Hotel Market Data and Benchmarking Company - STR.

STR collects the following performance metrics from participating properties either on a daily or monthly basis through their online platform or data feeds:

- Number of room available
- Number of rooms sold
- Total room revenue

These baseline figures are used to calculate the three most relevant

metrics within the accommodation industry namely: Occupancy, Average Daily Rate and Revenue per Available Room.

To allow a meaningful comparison of year on year trends, VisitEngland and STR have included historical data from STR's own participating properties in the reports from July 2017 onwards. The historical data displayed in these reports is not consistent with reports published prior to the July 2017 report.

Further details about STR's panel and data collection can be found in our methodology note.

All previous months' reports and data can be found on the VisitEngland website.



For information on how to contribute and participate in the England Occupancy Study and benefit from STR's property level benchmarking reports, please email scote@str.com.

For more information on STR's other available products and pricing:

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