

England Occupancy Survey

December 2017 Results



Summary of Results

Room occupancy in December has decreased -1% to 71%, whilst bedspace occupancy increased by +1% when compared to December 2016 to 52%. The change in room occupancy was led by an increase in **room supply** of 1.9% compared to an increase of only 1.4% in **demand** compared to the same month in 2016.

RevPar, which is the total room revenue divided by the total number of available rooms, increased by 1% in December at £65.82 compared to the previous year.

City/large town room occupancy decreased -1% to 72% whilst bedspace remained the same at 53%.

Seaside increased by +1% to 64% for room occupancy and increased by +2% to 51% for bedspace occupancy.

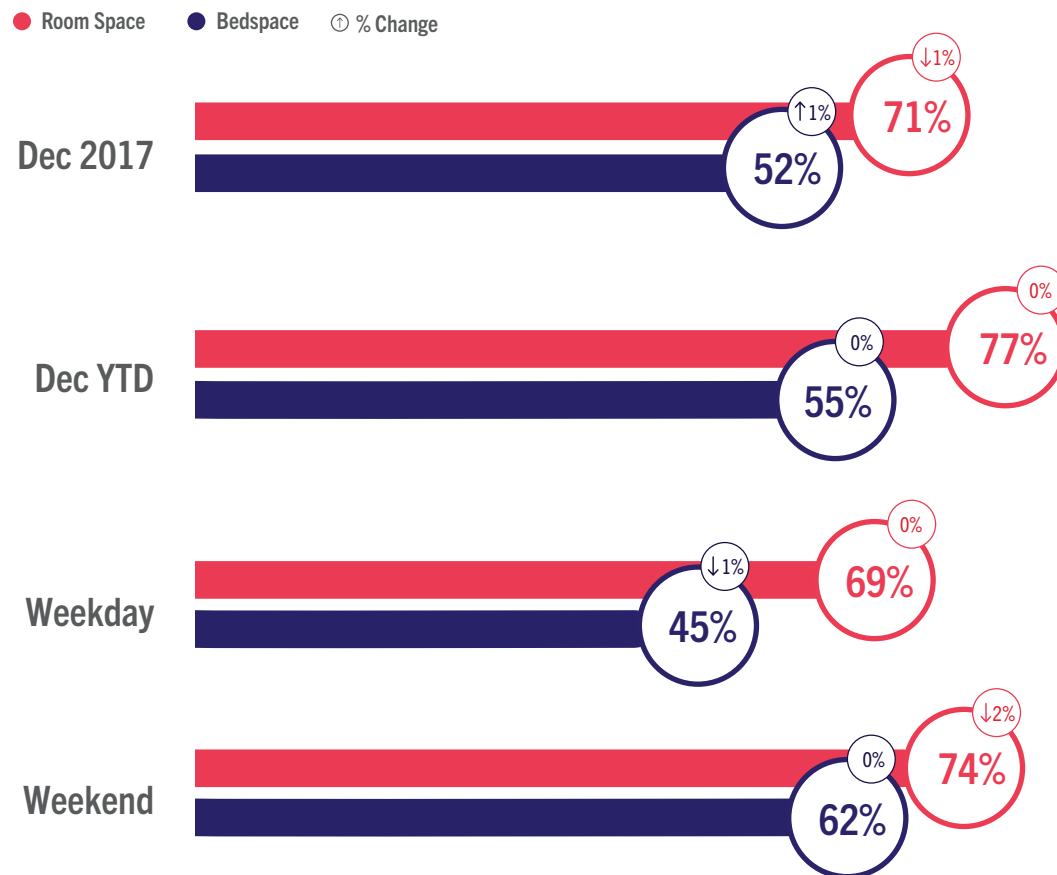
Small town room occupancy increased +1% to 63% and increased +1% for bedspace occupancy to 47%, with **countryside** occupancy remaining unchanged for room occupancy at 58% while bedspace occupancy decreased -1% to 41%.

Looking at room occupancy rates by **establishment size** all categories remained relatively unchanged with changes of 1% or less except for 1-25 rooms which decreased by 4% to 64%. For bedspace, 1-25 rooms decreased 3% to 48%, 26-50 rooms remained the same at 50%, 51-100 rooms remained at 53% and 101+ rooms remained at 52%.

Looking at occupancy by **region**, the largest shift for room occupancy came from London with a -2% decrease. All other regions remained relatively unchanged with a 2% or less change. For bedspace occupancy, all regions remained relatively unchanged with 1% or less change.

England Room and Bedspace Occupancy

At a glance - December 2017



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2015	2016	2017
Dec	69%	71%	71%
Dec YTD	78%	77%	77%
Weekday	67%	69%	69%
Weekend	74%	76%	74%

Bedspace Occupancy	2015	2016	2017
Dec	49%	52%	52%
Dec YTD	55%	55%	55%
Weekday	45%	45%	45%
Weekend	60%	62%	62%

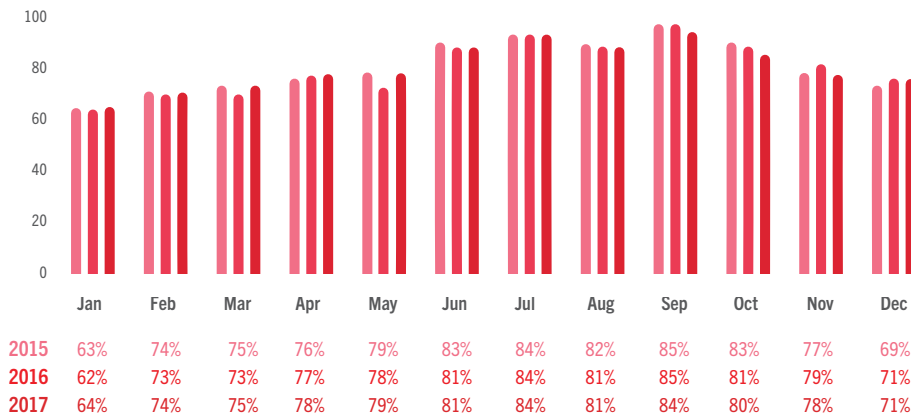
	2015	2016	2017
Room supply	1.2%	1.5%	1.9%
Room demand	-0.2%	4.4%	1.4%

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

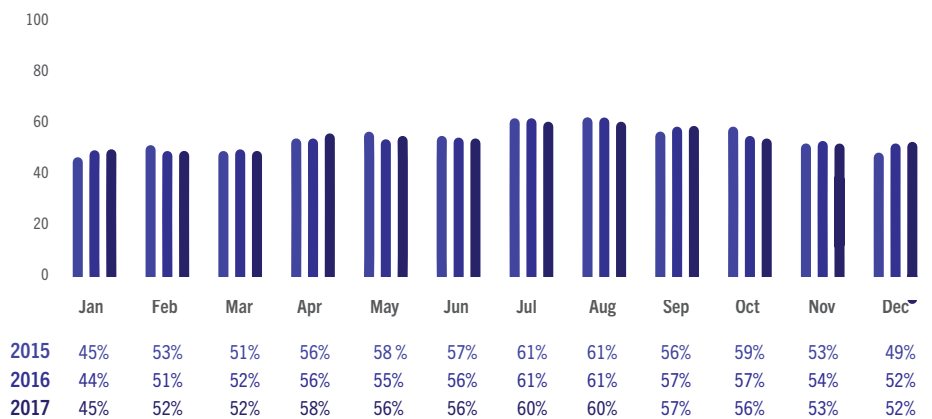


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - December 2017

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2015	2016	2017
Dec	£87.34	£92.05	£93.19
Weekday	£88.38	£89.85	£93.28
Weekend	£84.65	£96.27	£93.02

RevPAR

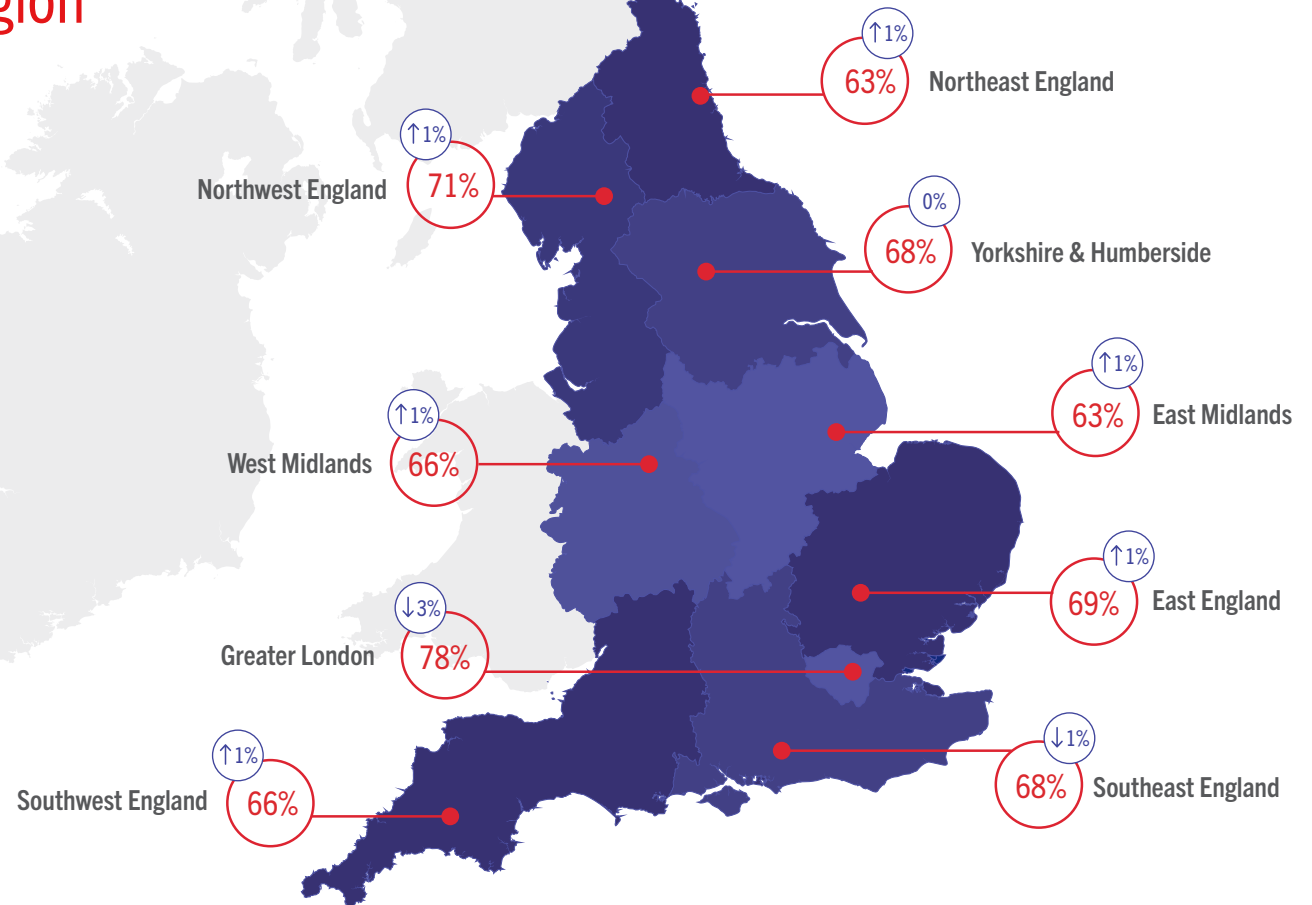
	2015	2016	2017
Dec	£60.26	£65.34	£65.82
Weekday	£59.31	£61.85	£64.24
Weekend	£62.97	£72.68	£69.14



Room Occupancy By Region

At a glance - December 2017

*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 - December 2017

Room Occupancy	2015	2016	2017
East England	68%	68%	69%
East Midlands	64%	63%	63%
Greater London	75%	80%	78%
Northeast England	63%	63%	63%
Northwest England	70%	70%	71%
Southeast England	66%	69%	68%
Southwest England	66%	65%	66%
West Midlands	65%	65%	66%
Yorkshire & Humberside	67%	68%	68%

Bedspace Occupancy	2015	2016	2017
East England	49%	50%	51%
East Midlands	46%	46%	47%
Greater London	55%	59%	58%
Northeast England	45%	46%	47%
Northwest England	51%	52%	52%
Southeast England	47%	50%	50%
Southwest England	46%	47%	48%
West Midlands	44%	46%	47%
Yorkshire & Humberside	49%	50%	51%

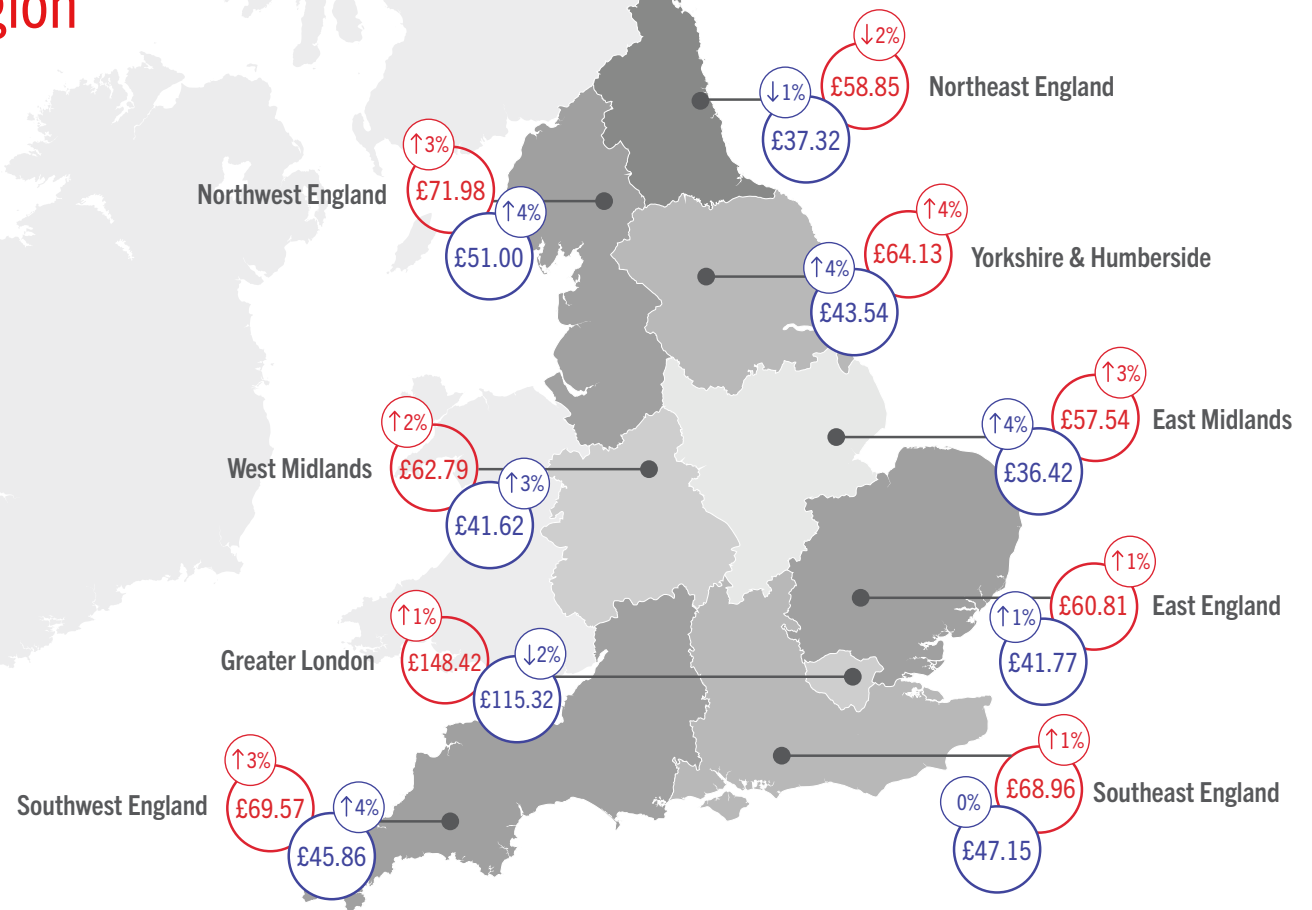


ADR and RevPAR By Region

At a glance - December 2017

*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 - December 2017

ADR	2015	2016	2017
East England	£59.94	£60.54	£60.81
East Midlands	£54.83	£56.09	£57.54
Greater London	£138.34	£147.69	£148.42
Northeast England	£60.03	£59.89	£58.85
Northwest England	£66.18	£69.80	£71.98
Southeast England	£67.18	£68.40	£68.96
Southwest England	£65.93	£67.77	£69.57
West Midlands	£59.47	£61.77	£62.79
Yorkshire & Humberside	£59.43	£61.68	£64.13

RevPAR	2015	2016	2017
East England	£40.79	£41.37	£41.77
East Midlands	£34.81	£35.19	£36.42
Greater London	£103.55	£118.00	£115.32
Northeast England	£38.02	£37.82	£37.32
Northwest England	£46.35	£49.08	£51.00
Southeast England	£44.32	£47.13	£47.15
Southwest England	£43.23	£44.05	£45.86
West Midlands	£38.65	£40.41	£41.62
Yorkshire & Humberside	£39.97	£41.95	£43.54



Room Occupancy By Destination Type

At a glance - December 2017



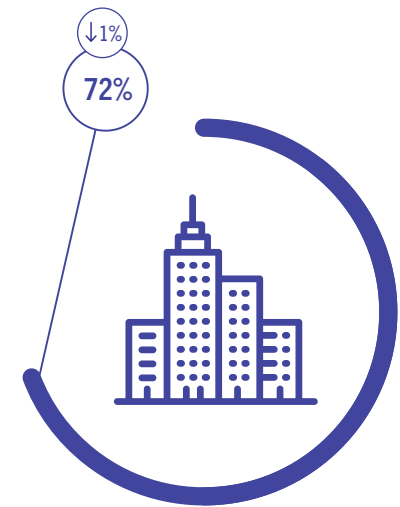
Countryside



Seaside



Small Town



City / Large Town



Occupancy By Location Type

Data Tables - December 2017

Room Occupancy

	2015	2016	2017
City / Large Town	71%	73%	72%
Small Town	63%	62%	63%
Countryside	61%	58%	58%
Seaside	63%	63%	64%

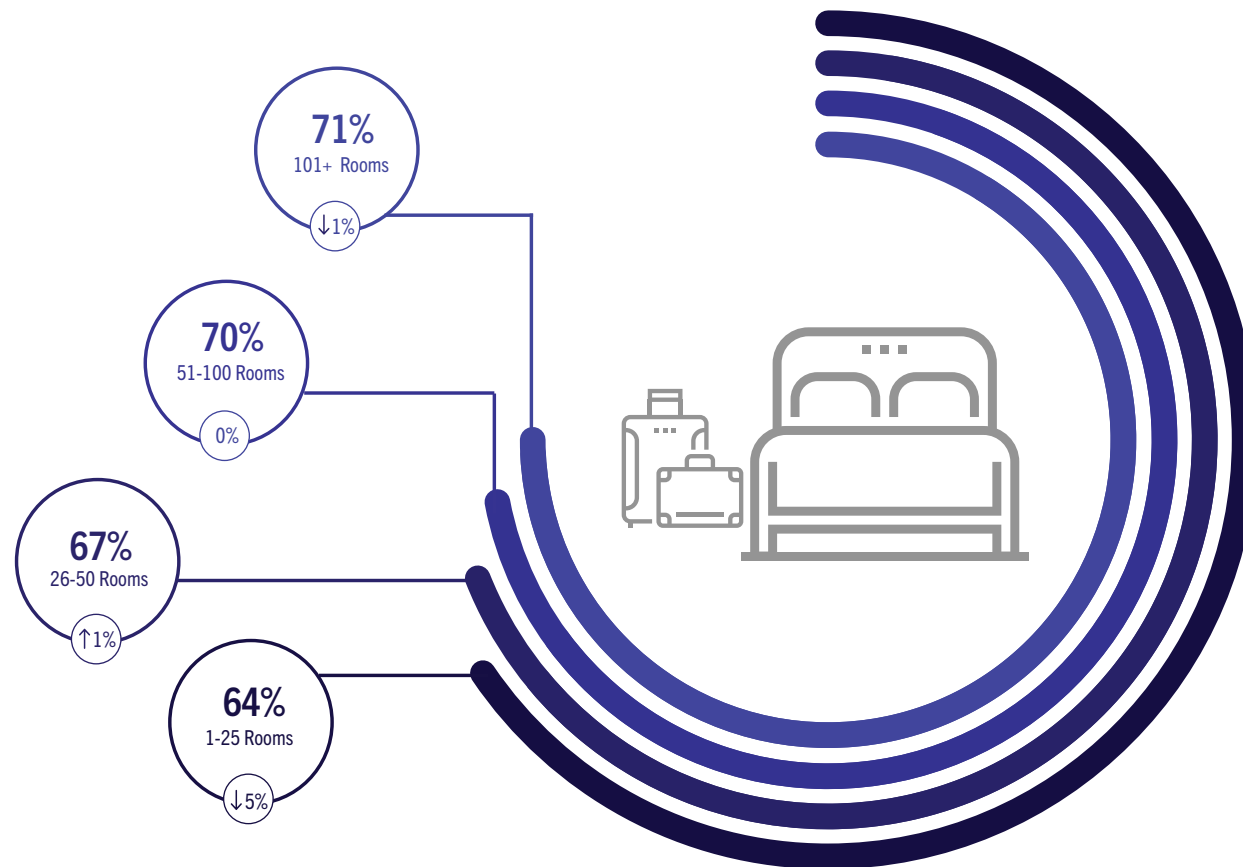
Bedspace Occupancy

	2015	2016	2017
City / Large Town	50%	53%	53%
Small Town	46%	46%	47%
Countryside	42%	42%	41%
Seaside	49%	49%	51%



Room Occupancy By Number of Rooms

At a glance - December 2017



Occupancy By Number of Rooms

Data Tables - December 2017

Room Occupancy

	2015	2016	2017
1-25 Rooms	69%	68%	64%
26-50 Rooms	68%	67%	67%
51-100 Rooms	69%	69%	70%
101+ Rooms	69%	72%	71%

Bedspace Occupancy

	2015	2016	2017
1-25 Rooms	51%	51%	48%
26-50 Rooms	49%	50%	50%
51-100 Rooms	51%	53%	53%
101+ Rooms	49%	52%	52%



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:

strglobal.com
+44 (0) 207 922 1930
hotelinfo@str.com

Benchmarking
↑ your world