

England Occupancy Survey

March 2018 Results



Summary of Results

Room occupancy in March has remained unchanged at 75%, whilst bedspace occupancy decreased by -1% when compared to March 2017 at 53%. The change in room occupancy was led by an increase in **room supply** of 1.6% compared to an increase of 1.9% in **demand** compared to the same month in 2017.

RevPar, which is the total room revenue divided by the total number of available rooms, increased by 1% in March at £67.96 compared to the previous year.

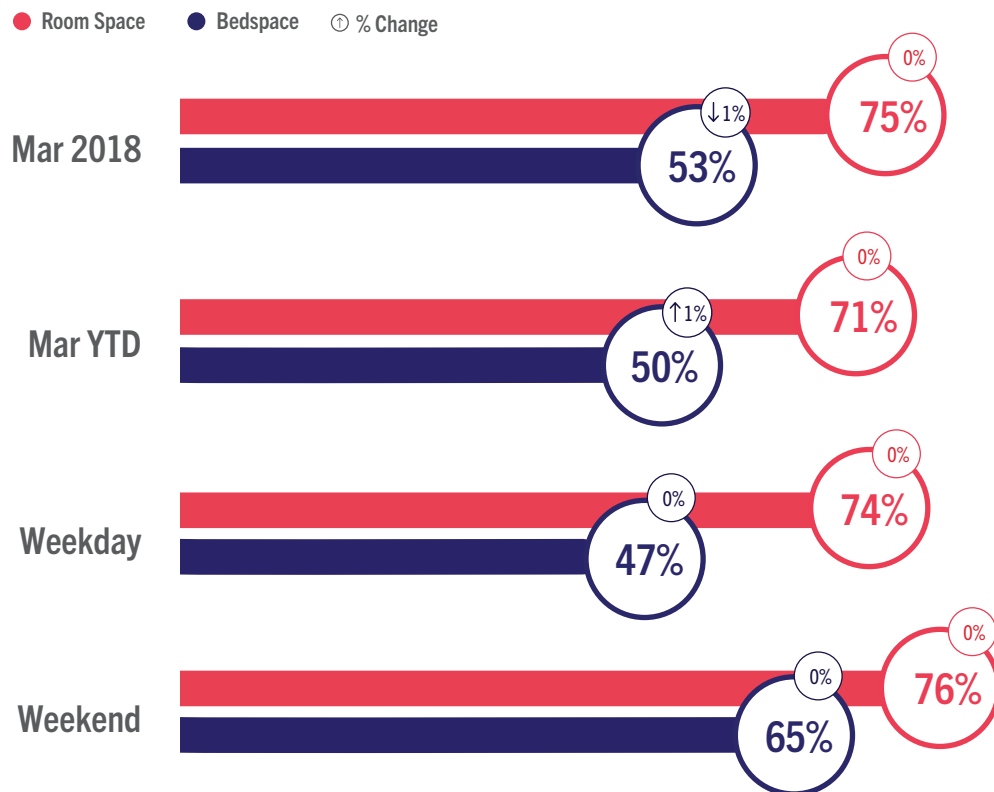
City/large town room occupancy was unchanged at 76% whilst bedspace occupancy decreased by -1% to 54%. **Seaside** was unchanged at 69% for room occupancy and 52% for bedspace occupancy. **Small town** room occupancy increased +1% to 69% and decreased by -1% for bedspace occupancy to 50%, with **countryside** decreasing -1% for room occupancy to 65% while bedspace occupancy decreased -1% to 45%.

Looking at room occupancy rates by **establishment size** most categories remained relatively unchanged except for 1-25 rooms which decreased by -4% to 68%. For bedspace, 1-25 room establishments decreased by -4% to 50%, whilst other categories remained relatively unchanged with changes of 1% or less.

Looking at occupancy by **region**, the largest shift for room occupancy came from Yorkshire & Humberside with a -3% decrease. The other notable shifts were Northwest England and Southwest England increasing by +2%. For bedspace occupancy, Yorkshire & Humberside declined by -3% and Greater London declined by -2%, whereas all other regions remained relatively unchanged with 1% or less change.

England Room and Bedspace Occupancy

At a glance - March 2018



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
Mar	73%	75%	75%
Mar YTD	69%	71%	71%
Weekday	72%	74%	74%
Weekend	76%	76%	76%

Bedspace Occupancy	2016	2017	2018
Mar	52%	54%	53%
Mar YTD	49%	49%	50%
Weekday	46%	47%	47%
Weekend	63%	65%	65%

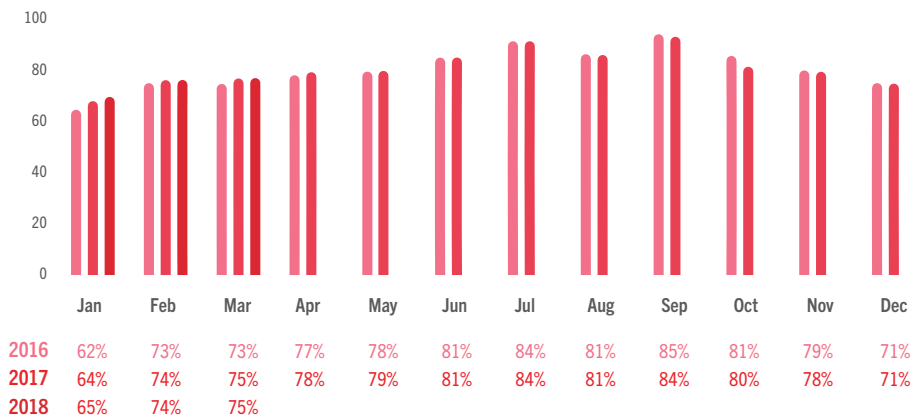
	2016	2017	2018
Room supply	1.5%	1.7%	1.6%
Room demand	-1.3%	4.5%	1.9%

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

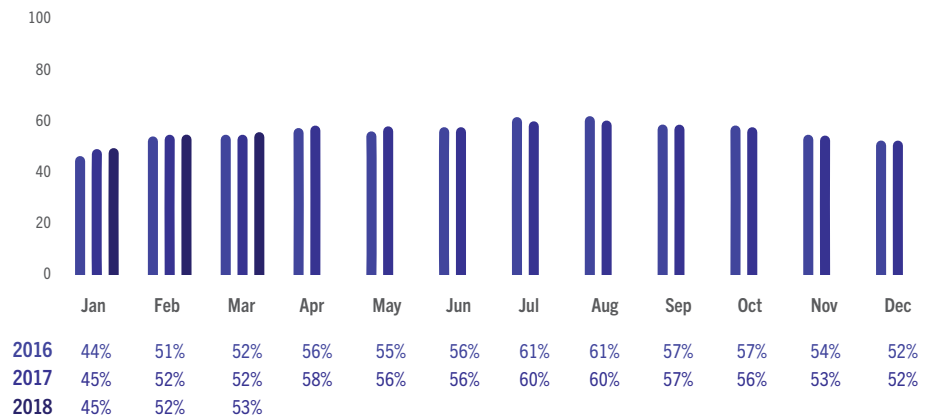


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



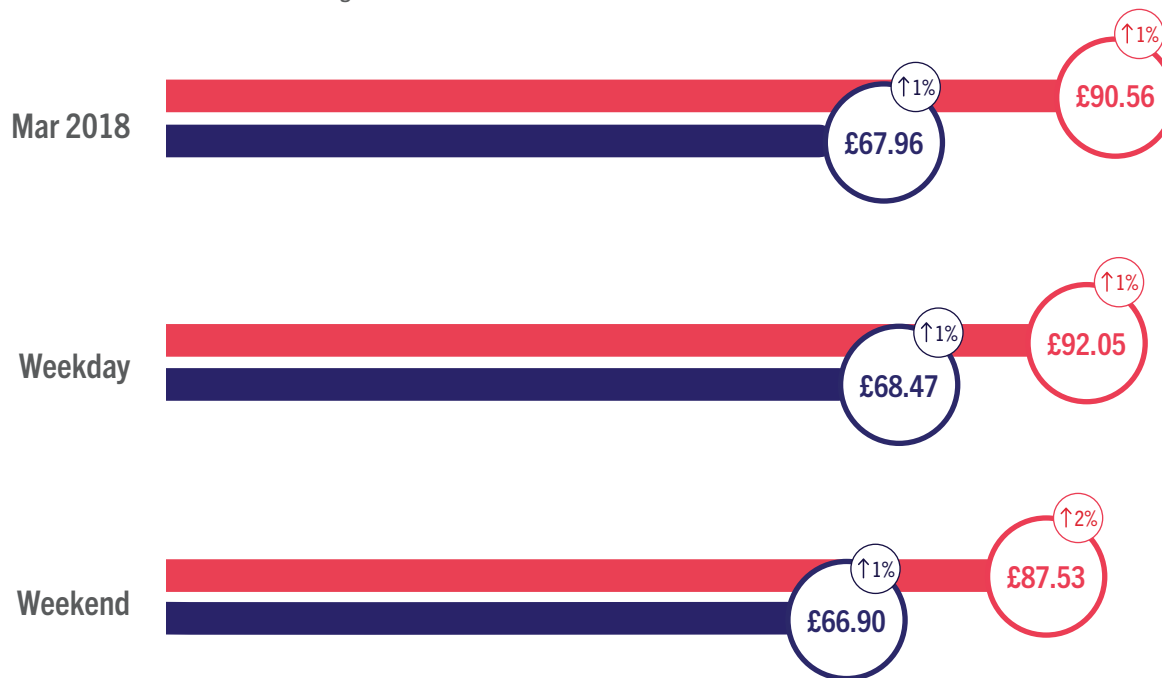
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - March 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
Mar	£85.12	£89.96	£90.56
Weekday	£86.23	£91.36	£92.05
Weekend	£82.14	£86.60	£87.53

RevPAR

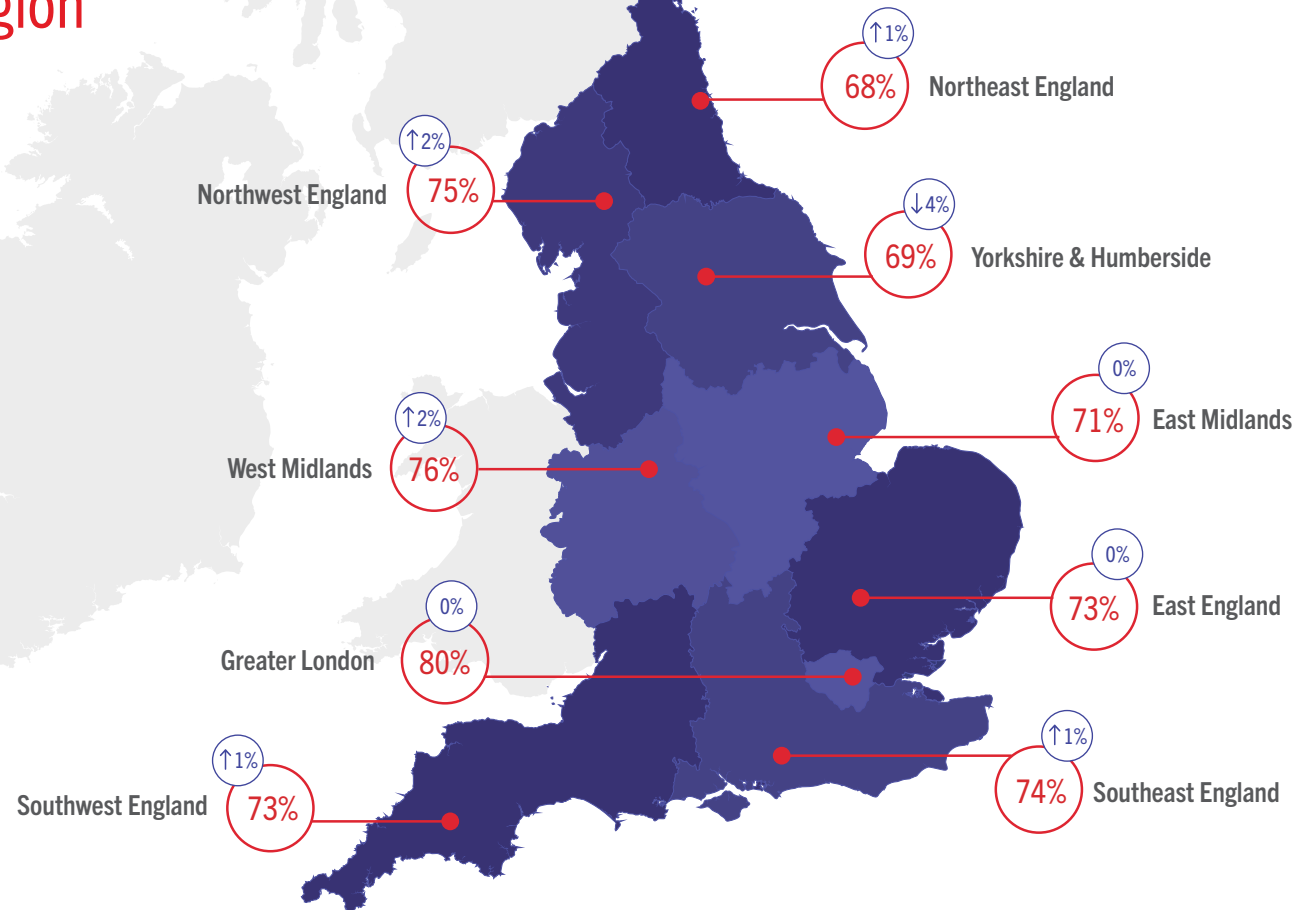
	2016	2017	2018
Mar	£62.01	£67.32	£67.96
Weekday	£61.78	£67.99	£68.47
Weekend	£62.69	£65.68	£66.90



Room Occupancy By Region

At a glance - March 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	72%	73%	73%
East Midlands	69%	71%	71%
Greater London	76%	80%	80%
Northeast England	66%	67%	68%
Northwest England	73%	73%	75%
Southeast England	72%	73%	74%
Southwest England	72%	71%	73%
West Midlands	73%	75%	76%
Yorkshire & Humberside	70%	72%	69%

Bedspace Occupancy	2016	2017	2018
East England	51%	53%	52%
East Midlands	49%	51%	50%
Greater London	55%	59%	57%
Northeast England	47%	48%	48%
Northwest England	52%	53%	53%
Southeast England	51%	52%	52%
Southwest England	51%	51%	51%
West Midlands	50%	52%	52%
Yorkshire & Humberside	51%	53%	50%

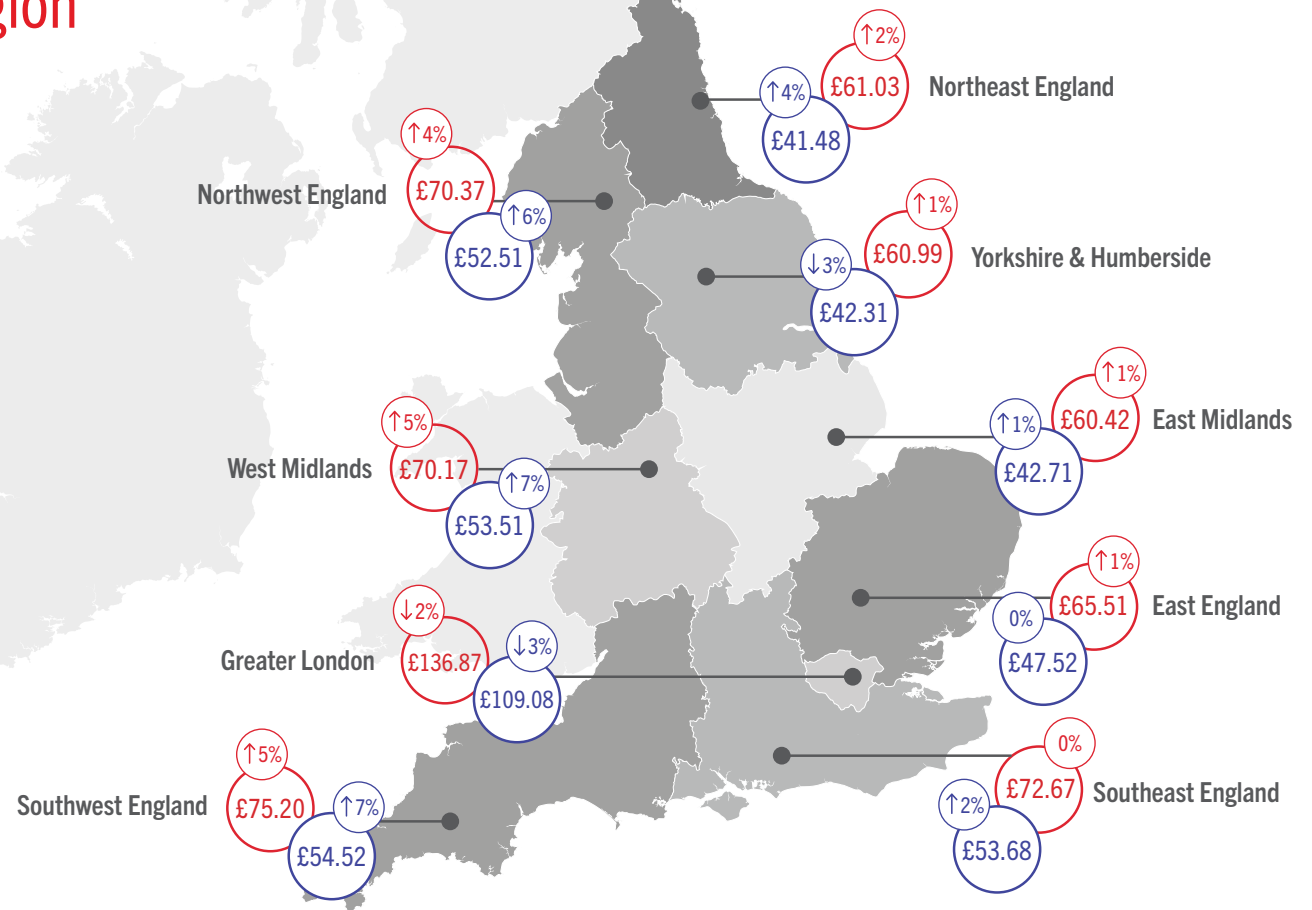


ADR and RevPAR By Region

At a glance

*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

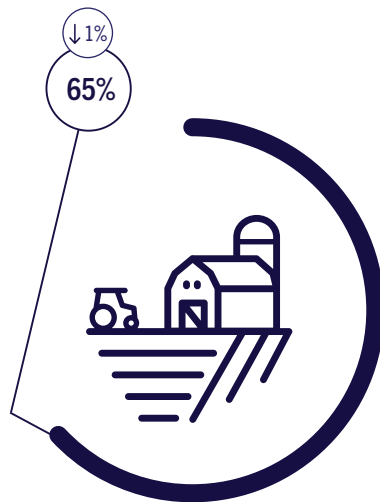
ADR	2016	2017	2018
East England	£62.01	£64.63	£65.51
East Midlands	£56.76	£59.53	£60.42
Greater London	£129.40	£139.67	£136.87
Northeast England	£59.62	£59.65	£61.03
Northwest England	£65.88	£67.58	£70.37
Southeast England	£70.34	£72.08	£72.67
Southwest England	£70.20	£71.30	£75.20
West Midlands	£64.64	£66.91	£70.17
Yorkshire & Humberside	£59.43	£60.07	£60.99

RevPAR	2016	2017	2018
East England	£44.63	£47.16	£47.52
East Midlands	£38.93	£42.30	£42.71
Greater London	£98.54	£112.30	£109.08
Northeast England	£39.46	£40.00	£41.48
Northwest England	£48.03	£49.41	£52.51
Southeast England	£50.37	£52.52	£53.68
Southwest England	£50.69	£50.93	£54.52
West Midlands	£47.20	£50.09	£53.51
Yorkshire & Humberside	£41.63	£43.50	£42.31



Room Occupancy By Destination Type

At a glance - March 2018



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2016	2017	2018
City / Large Town	74%	76%	76%
Small Town	68%	68%	69%
Countryside	66%	66%	65%
Seaside	71%	69%	69%

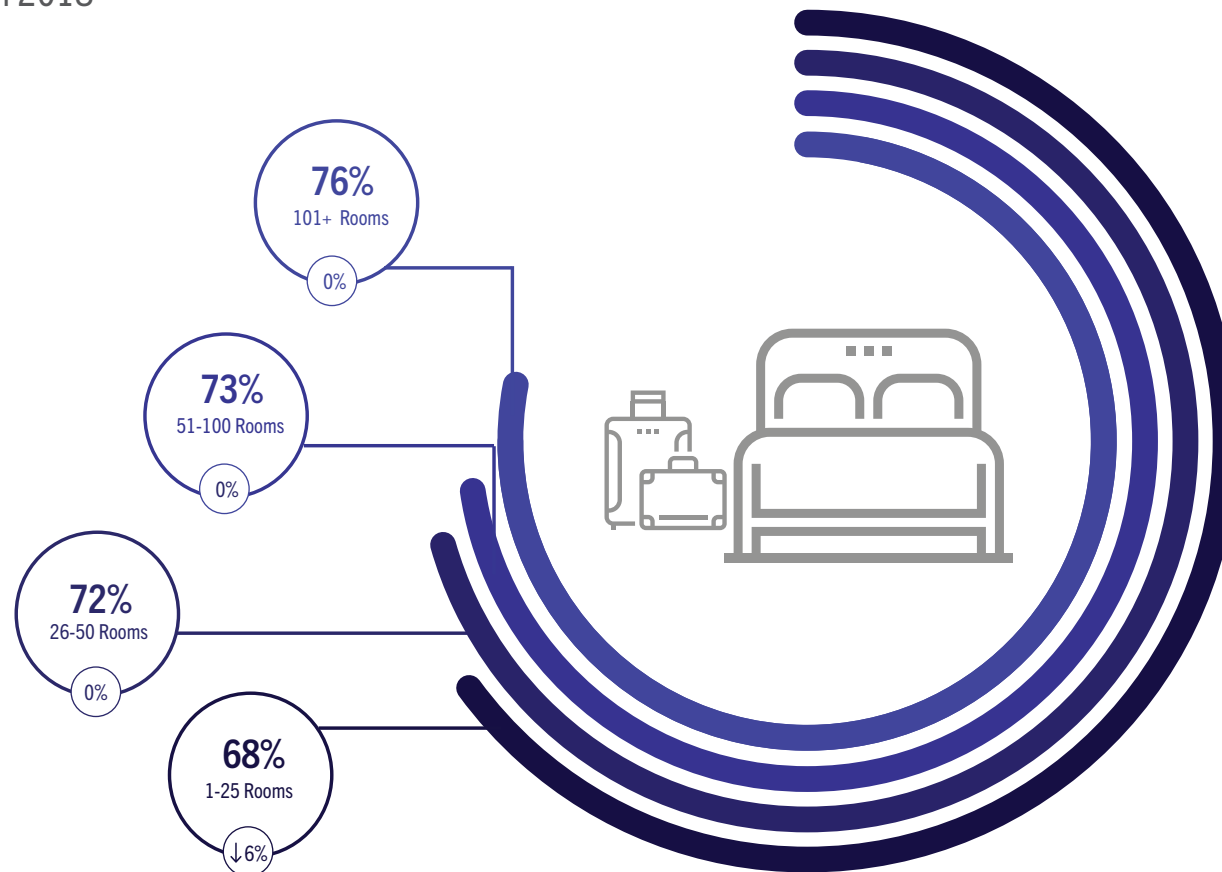
Bedspace Occupancy

	2016	2017	2018
City / Large Town	52%	55%	54%
Small Town	50%	51%	50%
Countryside	46%	46%	45%
Seaside	54%	52%	52%



Room Occupancy By Number of Rooms

At a glance - March 2018



Occupancy By Number of Rooms

Data Tables

Room Occupancy	2016	2017	2018
1-25 Rooms	72%	72%	68%
26-50 Rooms	71%	72%	72%
51-100 Rooms	72%	73%	73%
101+ Rooms	73%	76%	76%

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



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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