

England Occupancy Survey

August 2018 Results



Summary of Results

Room occupancy in August increased by +2% to 83% whilst **bedspace occupancy** increased by +3% when compared to August 2017 to 62%. The change in room occupancy was led by an increase in **room supply** of +1.3% and an increase of +3.7% 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 +5% in August to £77.92 compared to the previous year.

City/large town room occupancy increased by +3% to 83% whilst **bedspace occupancy** increased by +2% to 61%. **Seaside** room occupancy was stable at 89%, whilst **bedspace occupancy** increased by +1% to 75%. **Small town** room occupancy increased by +1% to 80% and increased by +1% for **bedspace occupancy** to 61%, with **countryside**

increasing by +3% for room occupancy to 78% and increasing by +2% for **bedspace occupancy** to 58%.

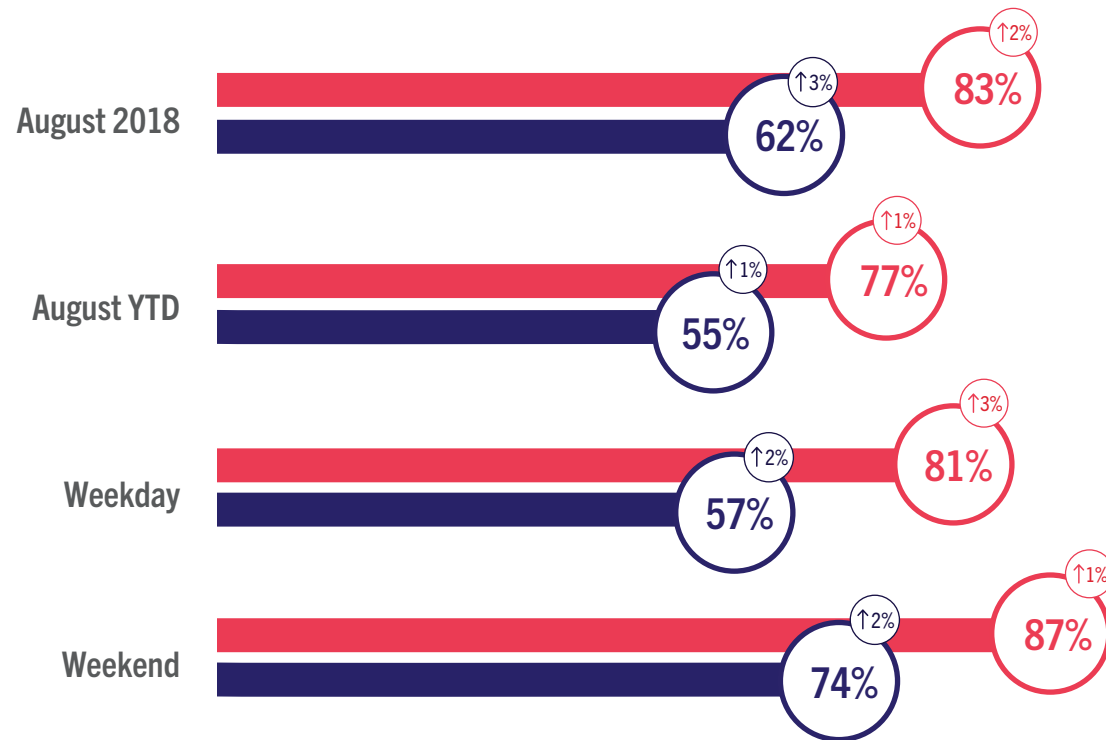
Looking at occupancy rates by **establishment** size, larger establishments with 101+ rooms increased by +3% in room occupancy and +2% in **bedspace occupancy**. All other categories remained relatively stable with changes of 1% or less for both room and **bedspace occupancy**.

Looking at occupancy rates by **region**, London increased to the greatest extent, by +6% in room occupancy and +4% in **bedspace occupancy**. North West and East Midlands both increased in room occupancy by +3%, and increased in **bedspace occupancy** by +2% and +3% respectively. All other regions were stable with changes of 1% or less for both room and **bedspace occupancy**.

England Room and Bedspace Occupancy

At a glance - August 2018

● Room Space ● Bedspace ⓘ % Change



England Room and Bedspace Occupancy

Data Tables

| Room Occupancy | 2016 | 2017 | 2018 |
|----------------|------|------|------|
| August | 81% | 81% | 83% |
| August YTD | 76% | 77% | 77% |
| Weekday | 79% | 79% | 81% |
| Weekend | 87% | 86% | 87% |

| Bedspace Occupancy | 2016 | 2017 | 2018 |
|--------------------|------|------|------|
| August | 61% | 60% | 62% |
| August YTD | 54% | 55% | 55% |
| Weekday | 56% | 55% | 57% |
| Weekend | 73% | 72% | 74% |

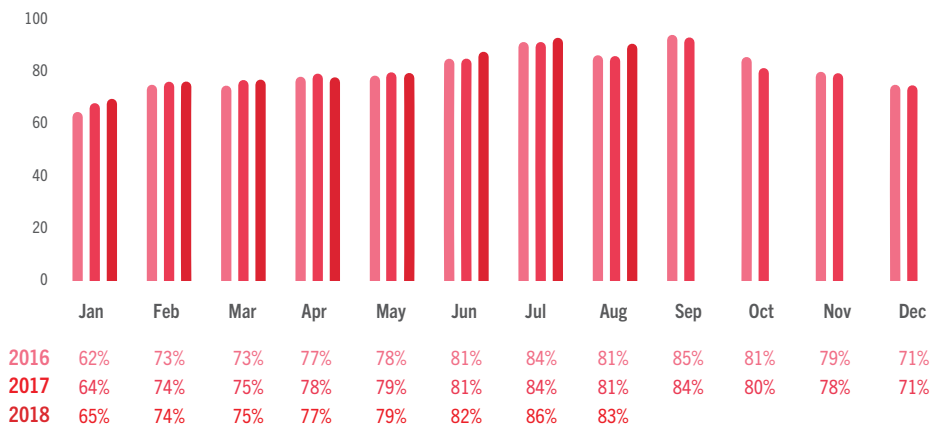
| | 2016 | 2017 | 2018 |
|-------------|------|------|------|
| Room supply | 1.4% | 2.1% | 1.3% |
| Room demand | 0.8% | 1.4% | 3.7% |

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

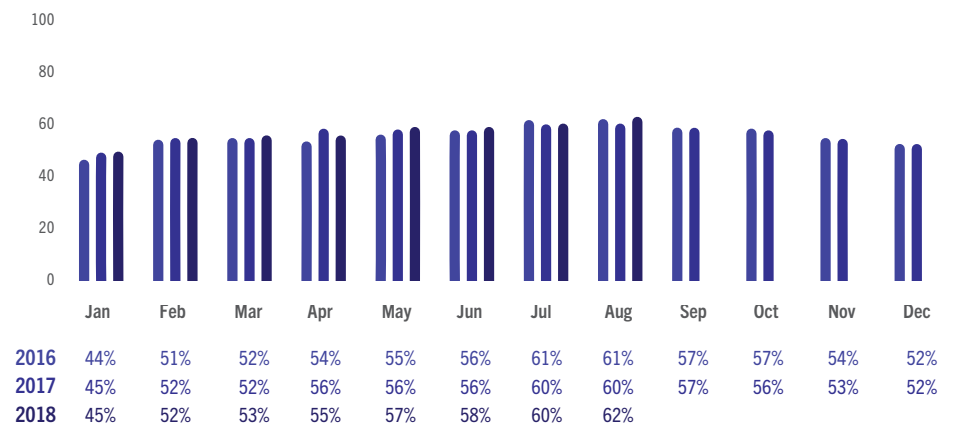


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - August 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

| | 2016 | 2017 | 2018 |
|---------|--------|--------|--------|
| August | £89.38 | £91.68 | £94.25 |
| Weekday | £88.55 | £90.30 | £92.83 |
| Weekend | £91.55 | £95.30 | £97.47 |

RevPAR

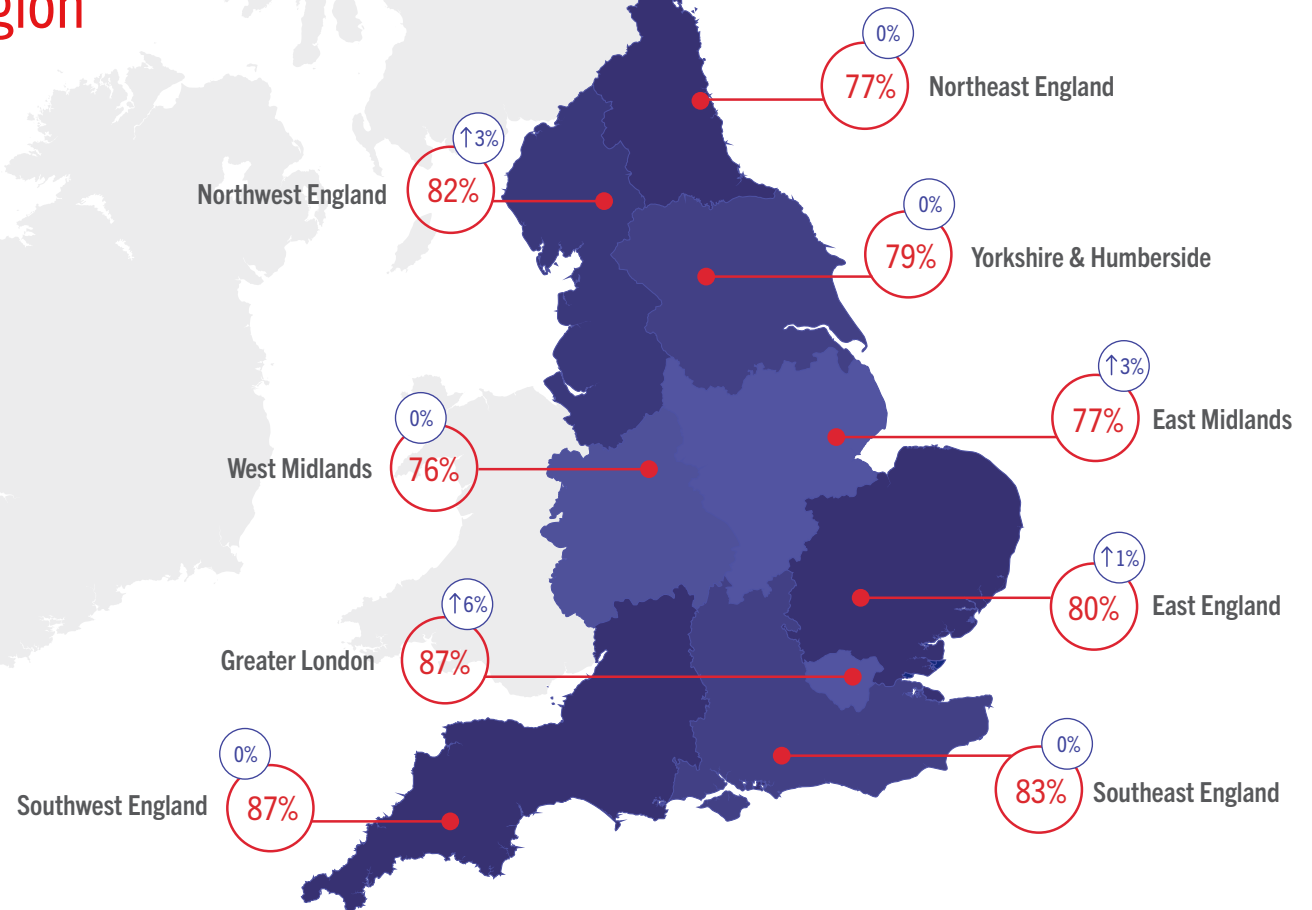
| | 2016 | 2017 | 2018 |
|---------|--------|--------|--------|
| August | £72.68 | £74.03 | £77.92 |
| Weekday | £70.10 | £71.11 | £75.09 |
| Weekend | £80.10 | £82.43 | £84.83 |



Room Occupancy By Region

At a glance - August 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 | 82% | 80% | 80% |
| East Midlands | 74% | 75% | 77% |
| Greater London | 85% | 82% | 87% |
| Northeast England | 74% | 77% | 77% |
| Northwest England | 79% | 80% | 82% |
| Southeast England | 82% | 83% | 83% |
| Southwest England | 88% | 87% | 87% |
| West Midlands | 74% | 76% | 76% |
| Yorkshire & Humberside | 79% | 79% | 79% |

| Bedspace Occupancy | 2016 | 2017 | 2018 |
|------------------------|------|------|------|
| East England | 61% | 59% | 60% |
| East Midlands | 56% | 56% | 59% |
| Greater London | 65% | 63% | 67% |
| Northeast England | 55% | 57% | 57% |
| Northwest England | 60% | 61% | 63% |
| Southeast England | 61% | 61% | 62% |
| Southwest England | 64% | 63% | 64% |
| West Midlands | 52% | 53% | 54% |
| Yorkshire & Humberside | 59% | 59% | 59% |

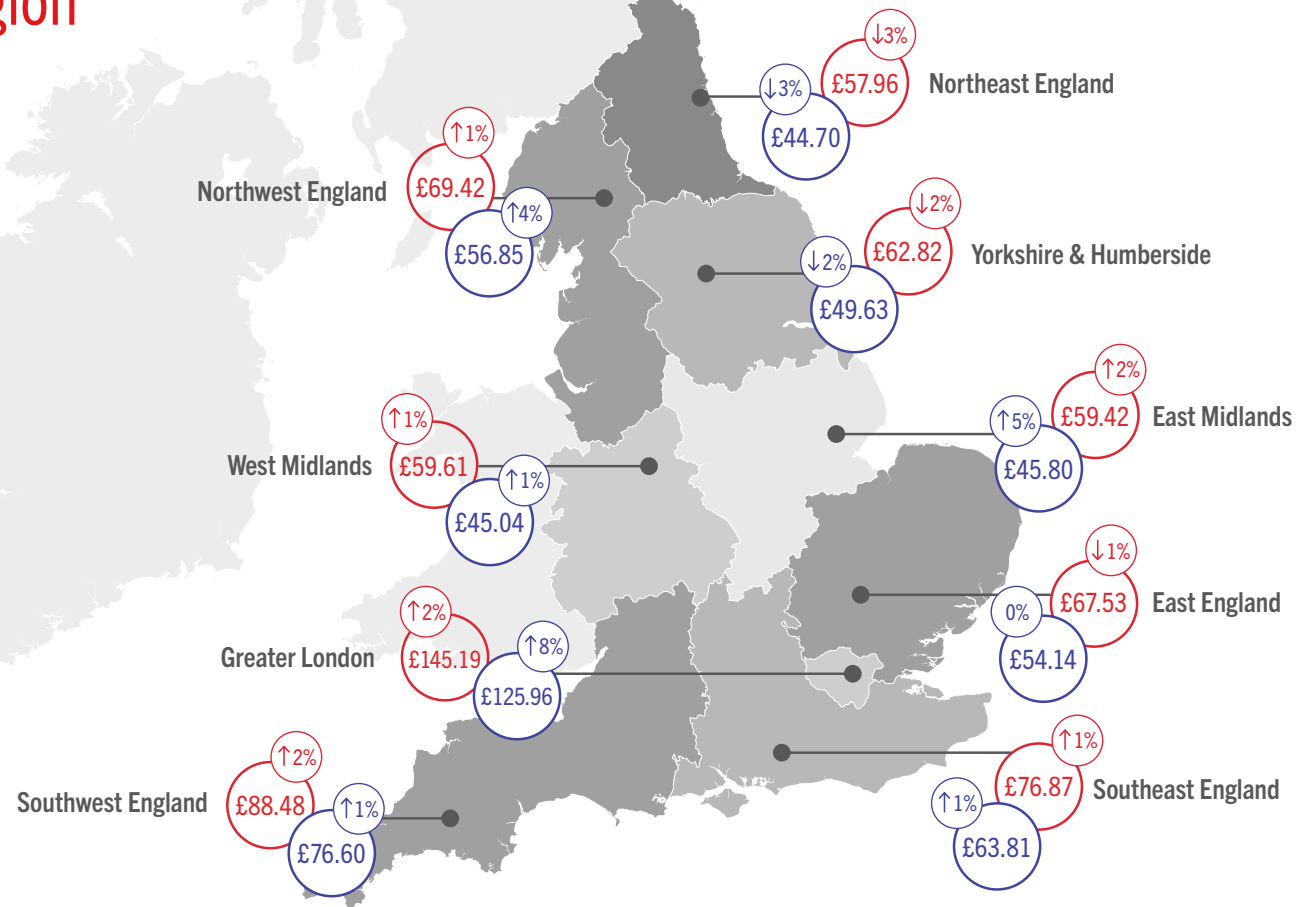


ADR and RevPAR By Region

At a glance - August 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 | £65.88 | £68.08 | £67.53 |
| East Midlands | £55.73 | £58.38 | £59.42 |
| Greater London | £137.74 | £141.65 | £145.19 |
| Northeast England | £59.82 | £59.80 | £57.96 |
| Northwest England | £66.75 | £68.71 | £69.42 |
| Southeast England | £74.31 | £76.09 | £76.87 |
| Southwest England | £83.68 | £87.08 | £88.48 |
| West Midlands | £58.16 | £58.96 | £59.61 |
| Yorkshire & Humberside | £61.30 | £63.83 | £62.82 |

| RevPAR | 2016 | 2017 | 2018 |
|------------------------|---------|---------|---------|
| East England | £53.98 | £54.14 | £54.14 |
| East Midlands | £41.46 | £43.71 | £45.80 |
| Greater London | £116.70 | £116.30 | £125.96 |
| Northeast England | £44.34 | £45.99 | £44.70 |
| Northwest England | £53.03 | £54.71 | £56.85 |
| Southeast England | £60.97 | £62.89 | £63.81 |
| Southwest England | £73.29 | £75.56 | £76.60 |
| West Midlands | £43.01 | £44.58 | £45.04 |
| Yorkshire & Humberside | £48.20 | £50.40 | £49.63 |



Room Occupancy By Destination Type

At a glance - August 2018



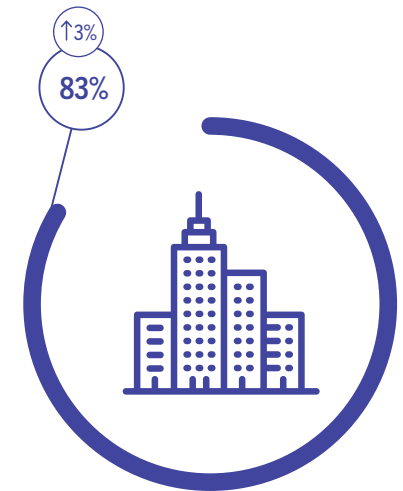
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

| | 2016 | 2017 | 2018 |
|-------------------|------|------|------|
| City / Large Town | 81% | 80% | 83% |
| Small Town | 79% | 79% | 80% |
| Countryside | 77% | 76% | 78% |
| Seaside | 91% | 89% | 89% |

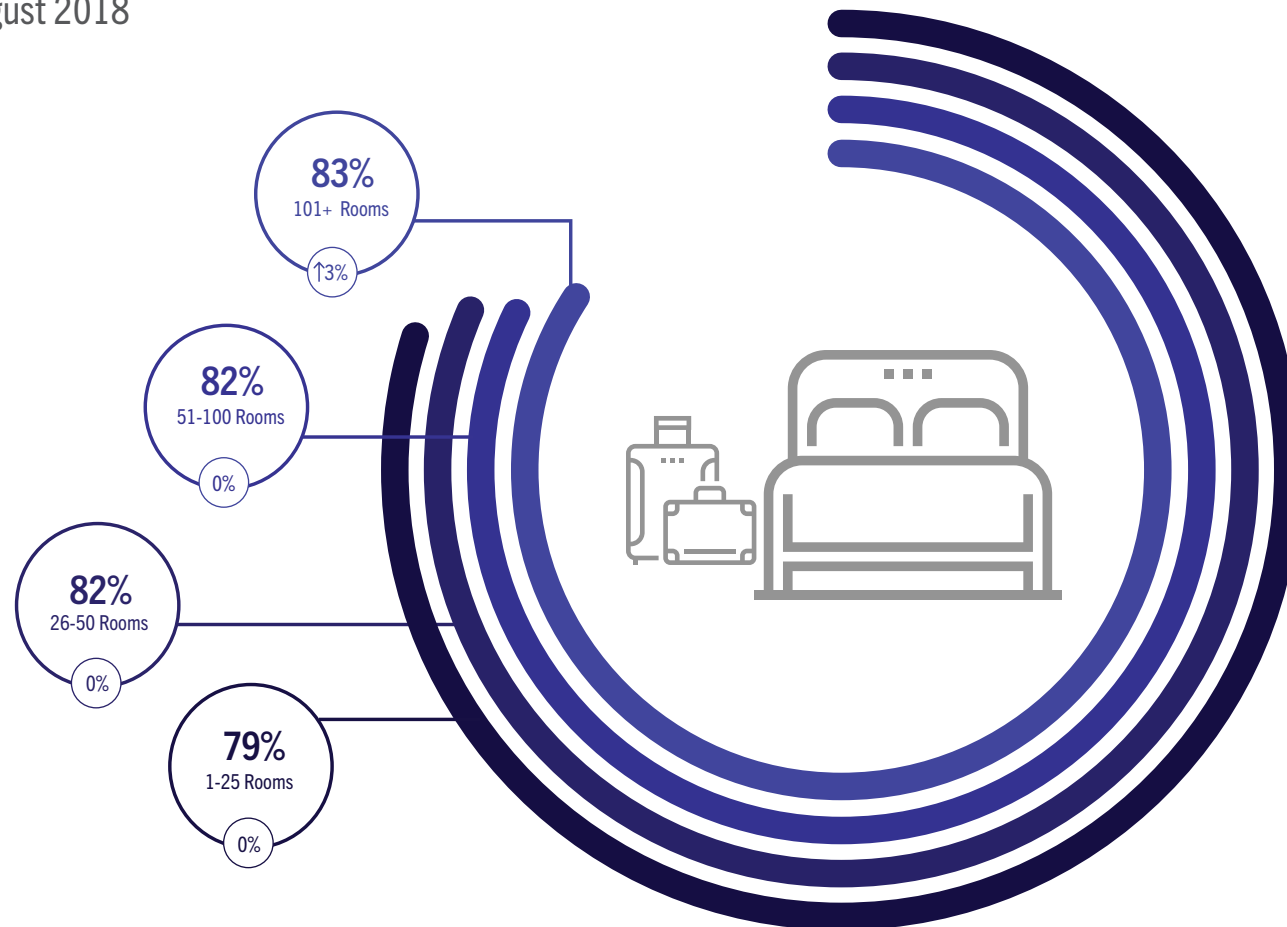
Bedspace Occupancy

| | 2016 | 2017 | 2018 |
|-------------------|------|------|------|
| City / Large Town | 60% | 59% | 61% |
| Small Town | 60% | 60% | 61% |
| Countryside | 57% | 56% | 58% |
| Seaside | 75% | 74% | 75% |



Room Occupancy By Number of Rooms

At a glance - August 2018



Occupancy By Number of Rooms

Data Tables

| Room Occupancy | 2016 | 2017 | 2018 |
|----------------|------|------|------|
| 1-25 Rooms | 77% | 79% | 79% |
| 26-50 Rooms | 81% | 82% | 82% |
| 51-100 Rooms | 82% | 82% | 82% |
| 101+ Rooms | 81% | 80% | 83% |

| Bedspace Occupancy | 2016 | 2017 | 2018 |
|--------------------|------|------|------|
| 1-25 Rooms | 59% | 61% | 62% |
| 26-50 Rooms | 61% | 61% | 62% |
| 51-100 Rooms | 63% | 63% | 64% |
| 101+ Rooms | 60% | 60% | 62% |



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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