

England Occupancy Survey

December 2018 Results



Summary of Results

Room occupancy in December increased by +3% to 72% whilst **bedspace occupancy** increased by +1% to 52% when compared to December 2017. In December there was an increase of +2.2% in **room supply** and an increase of +4.8% 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 +7% in December to £69.85 compared to the previous year.

City/large town room occupancy increased by +3% to 74% whilst **bedspace occupancy** remained unchanged at 53%. **Seaside** room occupancy increased by +4% to 67%, whilst **bedspace occupancy** increased by +2% to 52%. **Small town** room occupancy increased by +2% to 64% whilst **bedspace occupancy** remained unchanged at

47%. **Countryside** room occupancy increased by +4% to 58% and **bedspace occupancy** increased by +1% to 41%.

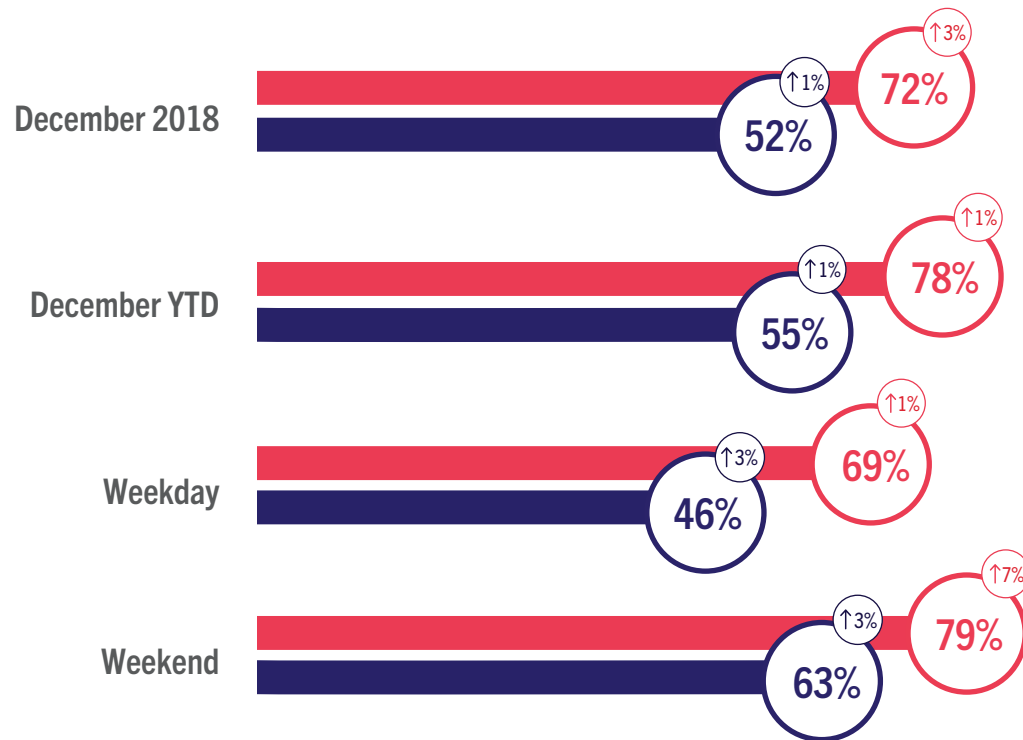
Looking at occupancy rates by **establishment size**, establishments with 1-25 rooms showed greatest percentage increase in room occupancy, increasing by of +5% to 67% compared to the same period last year and increasing **bedspace occupancy** by +2% to 50%. Establishments with 101+ rooms showed increase of +3% to 73% in room occupancy and **bedspace occupancy** increased by +1% to 53%.

Looking at occupancy rates by **region**, the biggest shift came from Greater London, who increased by +5% in room occupancy and +2% in **bedspace occupancy**. East Midlands saw the next greatest increases, increasing by +5% for room occupancy, and increasing by +1% for **bedspace occupancy** compared to December 2017.

England Room and Bedspace Occupancy

At a glance - December 2018

● Room Space ● Bedspace ⓘ % Change



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
December	71%	70%	72%
December YTD	77%	77%	78%
Weekday	69%	69%	69%
Weekend	75%	74%	79%

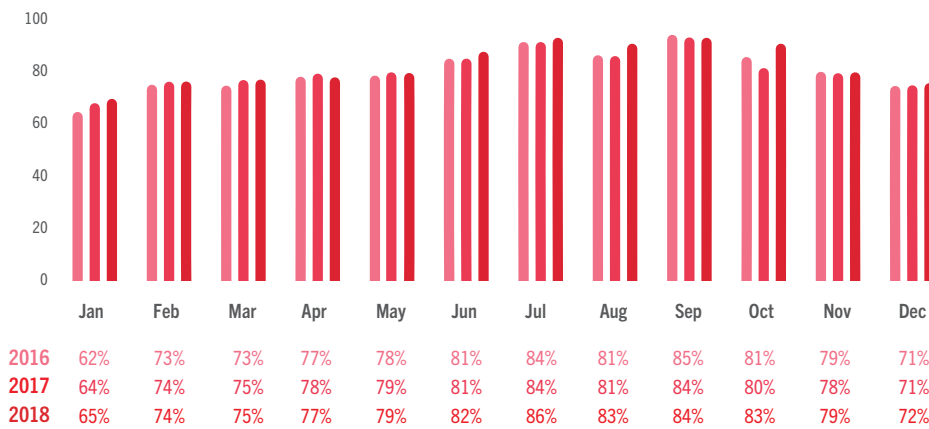
Bedspace Occupancy	2016	2017	2018
December	52%	52%	52%
December YTD	55%	55%	55%
Weekday	45%	45%	46%
Weekend	62%	61%	63%

	2016	2017	2018
Room supply	1.4%	1.8%	2.2%
Room demand	4.2%	1.0%	4.8%

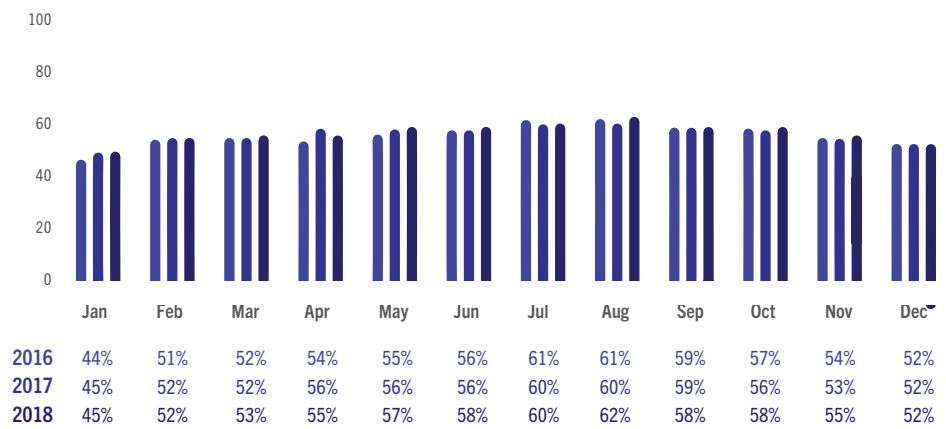
Table to the left shows the room supply and room demand year on year relative percentage change.

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 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
December	£92.22	£93.12	£96.82
Weekday	£89.98	£93.17	£96.79
Weekend	£96.50	£93.02	£96.90

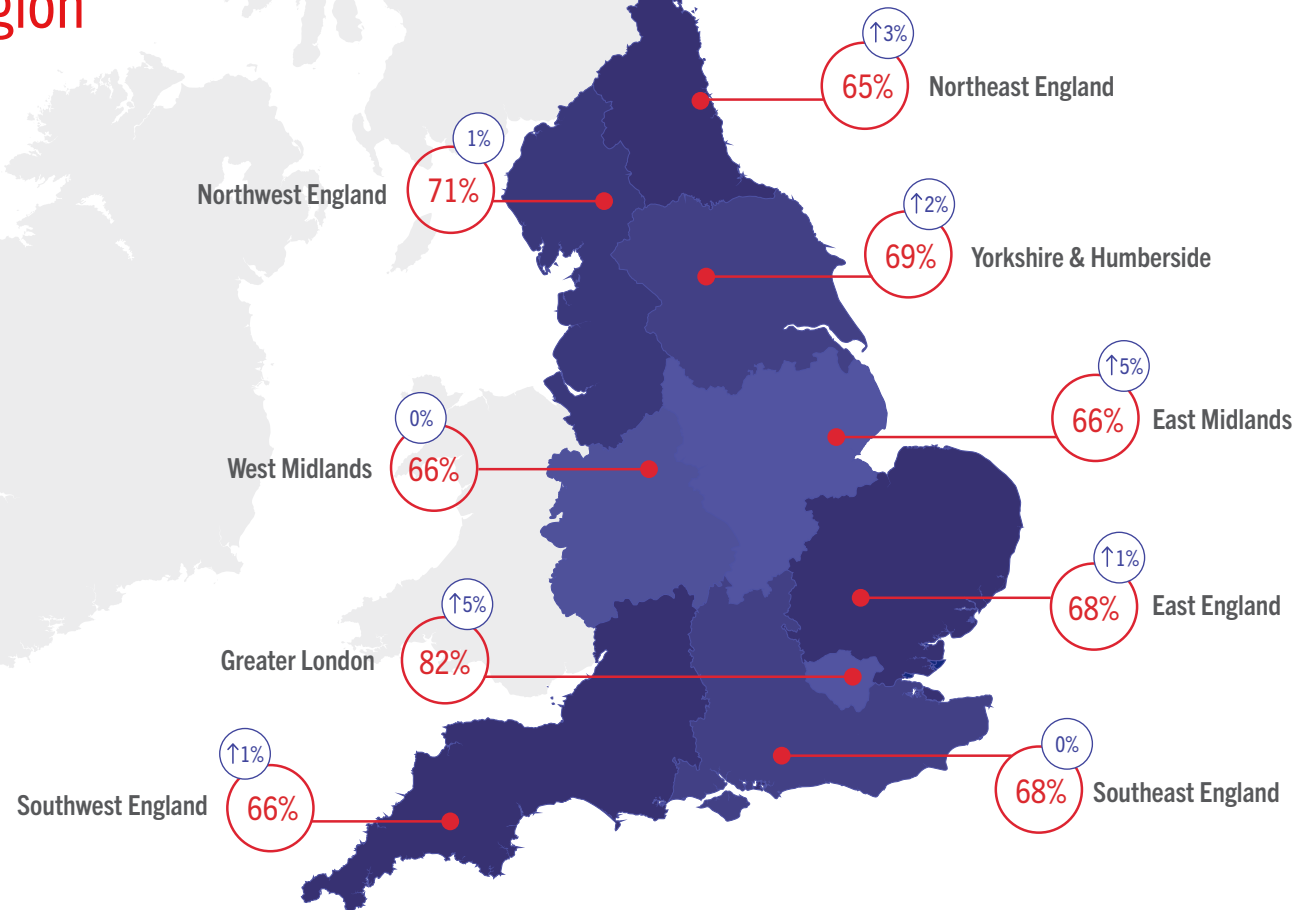
RevPAR

	2016	2017	2018
December	£65.38	£65.49	£69.85
Weekday	£61.85	£63.87	£67.15
Weekend	£72.77	£68.88	£76.43

Room Occupancy By Region

At a glance - December 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	68%	68%	68%
East Midlands	63%	63%	66%
Greater London	80%	78%	82%
Northeast England	63%	63%	65%
Northwest England	70%	71%	71%
Southeast England	69%	68%	68%
Southwest England	65%	65%	66%
West Midlands	65%	66%	66%
Yorkshire & Humberside	68%	68%	69%

Bedspace Occupancy	2016	2017	2018
East England	50%	50%	50%
East Midlands	46%	47%	48%
Greater London	59%	58%	60%
Northeast England	46%	46%	47%
Northwest England	52%	52%	52%
Southeast England	50%	50%	49%
Southwest England	47%	48%	47%
West Midlands	46%	47%	46%
Yorkshire & Humberside	50%	51%	51%

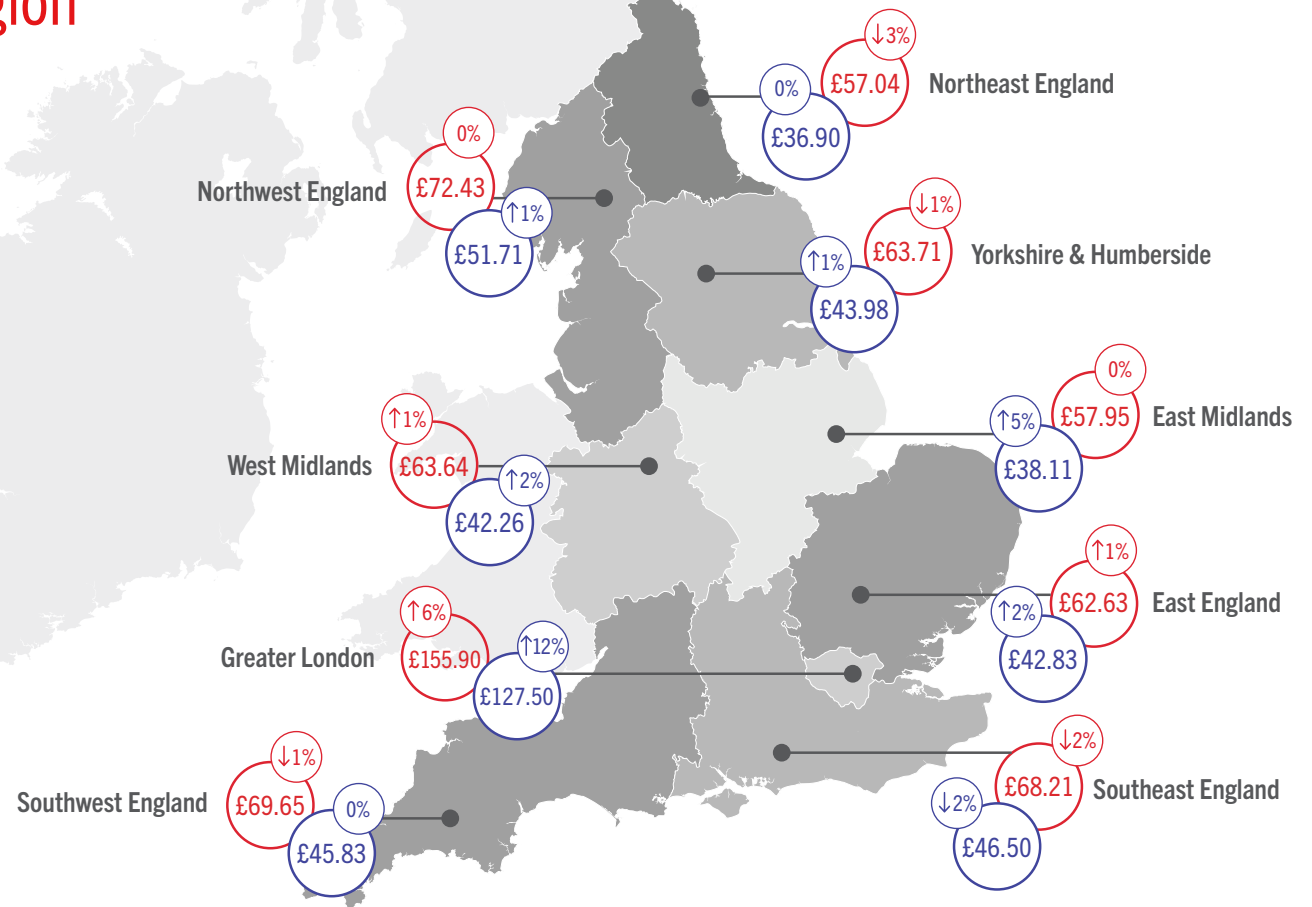


ADR and RevPAR By Region

At a glance - December 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	£61.20	£61.93	£62.63
East Midlands	£56.12	£57.80	£57.95
Greater London	£146.97	£146.93	£155.90
Northeast England	£59.89	£58.95	£57.04
Northwest England	£69.87	£72.31	£72.43
Southeast England	£68.92	£69.53	£68.21
Southwest England	£68.04	£70.42	£69.65
West Midlands	£61.77	£62.78	£63.64
Yorkshire & Humberside	£61.93	£64.49	£63.71

RevPAR	2016	2017	2018
East England	£41.50	£41.82	£42.83
East Midlands	£35.18	£36.26	£38.11
Greater London	£117.54	£114.25	£127.50
Northeast England	£37.82	£37.09	£36.90
Northwest England	£49.06	£51.13	£51.71
Southeast England	£47.22	£47.23	£46.50
Southwest England	£44.09	£45.99	£45.83
West Midlands	£40.41	£41.49	£42.26
Yorkshire & Humberside	£42.13	£43.71	£43.98



Room Occupancy By Destination Type

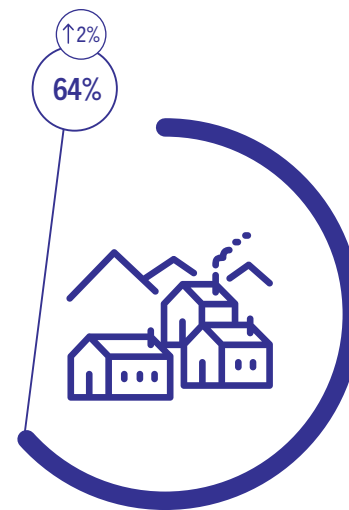
At a glance - December 2018



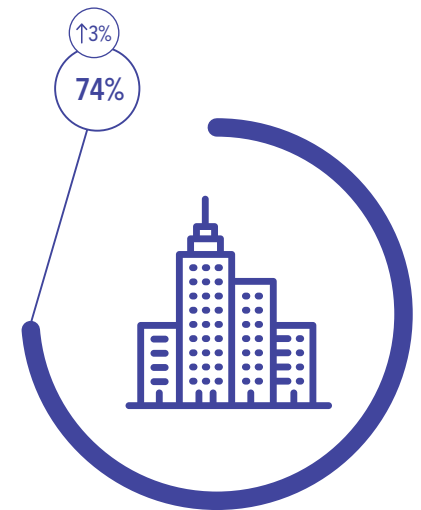
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

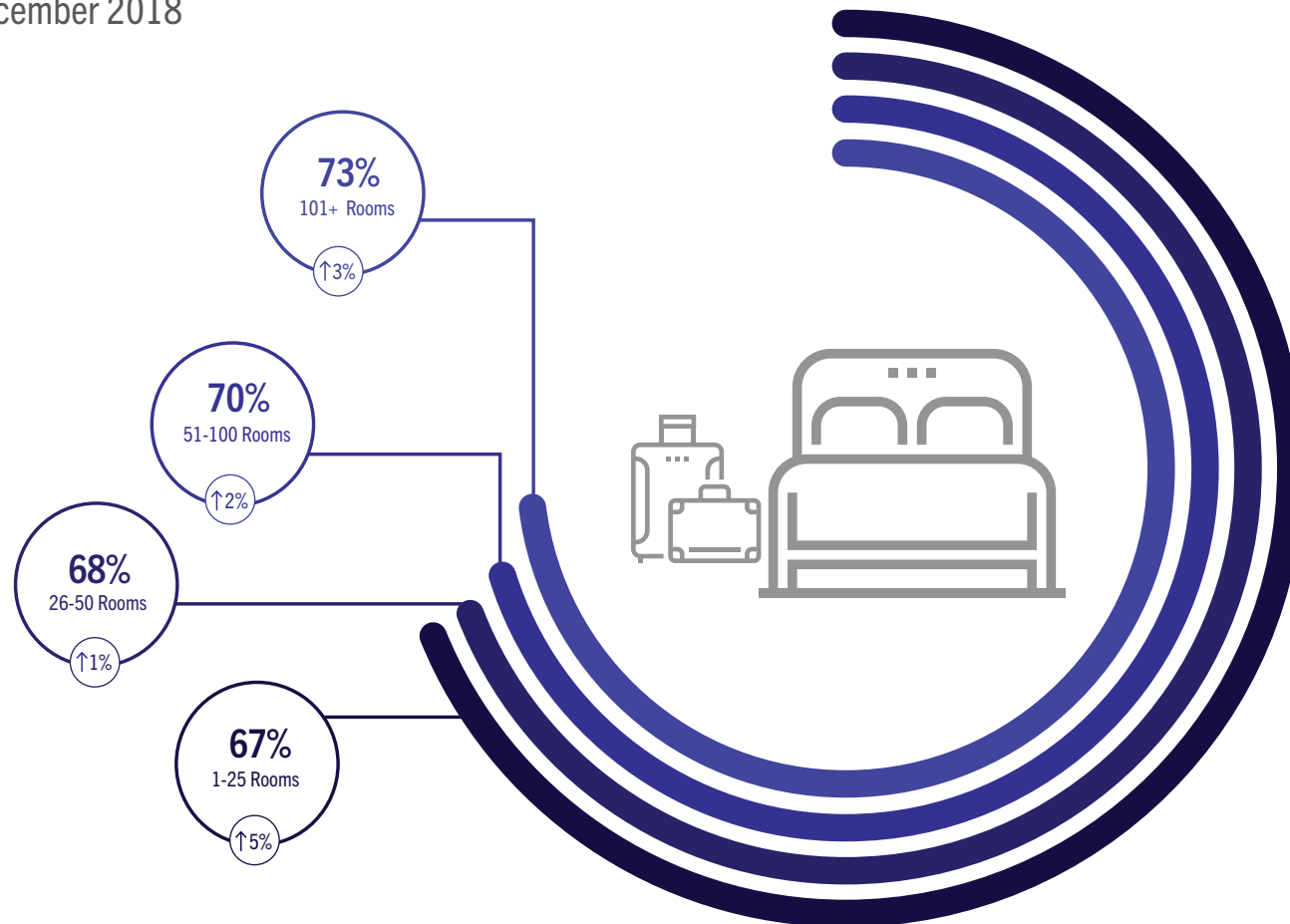
Room Occupancy	2016	2017	2018
City / Large Town	73%	72%	74%
Small Town	63%	63%	64%
Countryside	57%	56%	58%
Seaside	63%	64%	67%

Bedspace Occupancy	2016	2017	2018
City / Large Town	53%	53%	53%
Small Town	47%	47%	47%
Countryside	40%	40%	41%
Seaside	49%	50%	52%



Room Occupancy By Number of Rooms

At a glance - December 2018



Occupancy By Number of Rooms

Data Tables

Room Occupancy	2016	2017	2018
1-25 Rooms	67%	64%	67%
26-50 Rooms	66%	67%	68%
51-100 Rooms	69%	69%	70%
101+ Rooms	72%	71%	73%

Bedspace Occupancy	2016	2017	2018
1-25 Rooms	50%	48%	50%
26-50 Rooms	49%	50%	50%
51-100 Rooms	53%	53%	53%
101+ Rooms	52%	52%	53%



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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