

England Occupancy Survey

October 2018 Results



Summary of Results

Room occupancy in October increased by +3% to 83% whilst **bedspace occupancy** increased by +3% to 58% when compared to October 2017. In October there was an increase of +1.8% in **room supply** and an increase of +5.3% 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 +9% in October to £83.58 compared to the previous year.

City/large town room occupancy increased by +4% to 84% whilst **bedspace occupancy** increased by +2% to 58%. **Seaside** room occupancy increased by +1% to 79%, whilst **bedspace occupancy** increased by +1% to 59%. **Small town** room occupancy increased

by +2% to 78% and increased by +1% for **bedspace occupancy** to 56%, with **countryside** room occupancy unchanged at 70% whilst **bedspace occupancy** decreased by -1% to 47%.

Looking at occupancy rates by **establishment** size, all establishment types increased in both room and **bedspace occupancy**. Establishments with 101+ rooms increased to the greatest extent, increasing by +4% in room occupancy and 2% in **bedspace occupancy**.

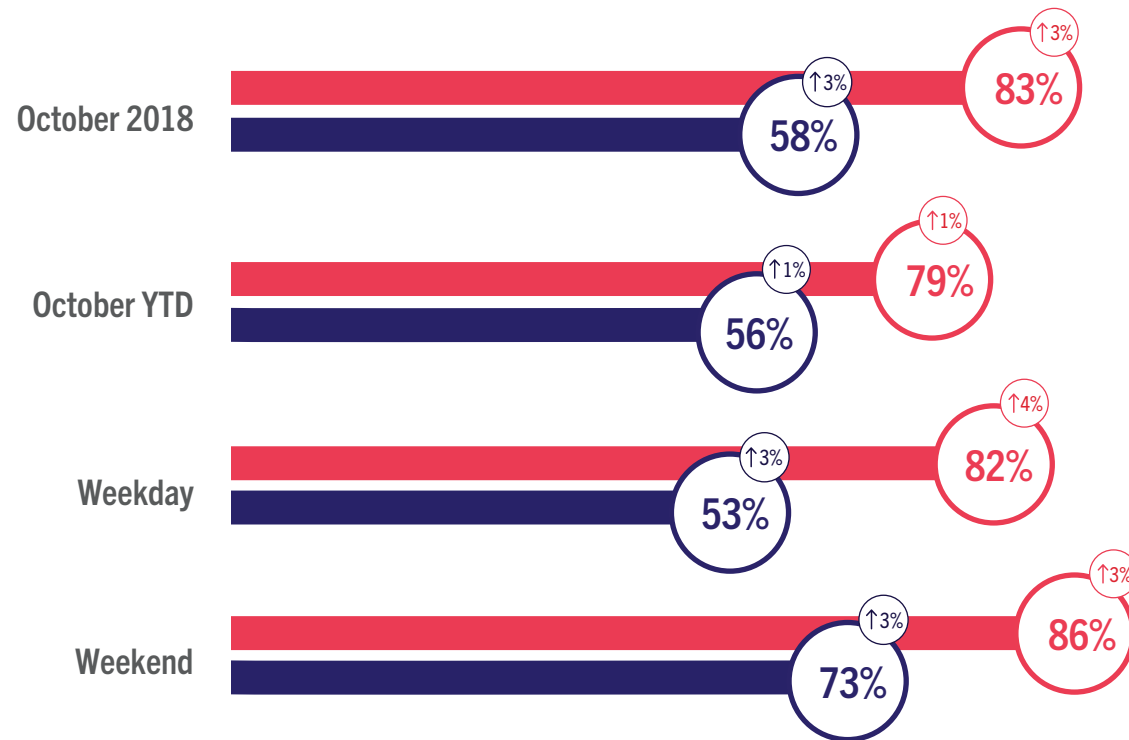
Looking at occupancy rates by **region**, the biggest shift came from Greater London, who increased by +7% in room occupancy and +4% in **bedspace occupancy**. Other notable shifts came from North West and East of England, who both increased by +4% in room occupancy and 3% in **bedspace occupancy** compared to October 2017.



England Room and Bedspace Occupancy

At a glance - October 2018

● Room Space ● Bedspace ⓘ % Change



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
October	81%	80%	83%
October YTD	78%	78%	79%
Weekday	79%	79%	82%
Weekend	85%	84%	86%

Bedspace Occupancy	2016	2017	2018
October	57%	56%	58%
October YTD	55%	55%	56%
Weekday	51%	51%	53%
Weekend	71%	70%	73%

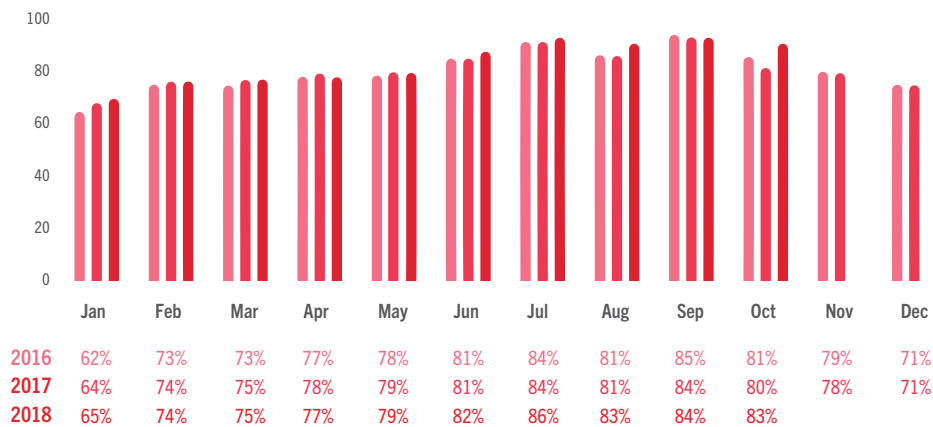
	2016	2017	2018
Room supply	1.4%	2.0%	1.8%
Room demand	-1.0%	1.4%	5.3%

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

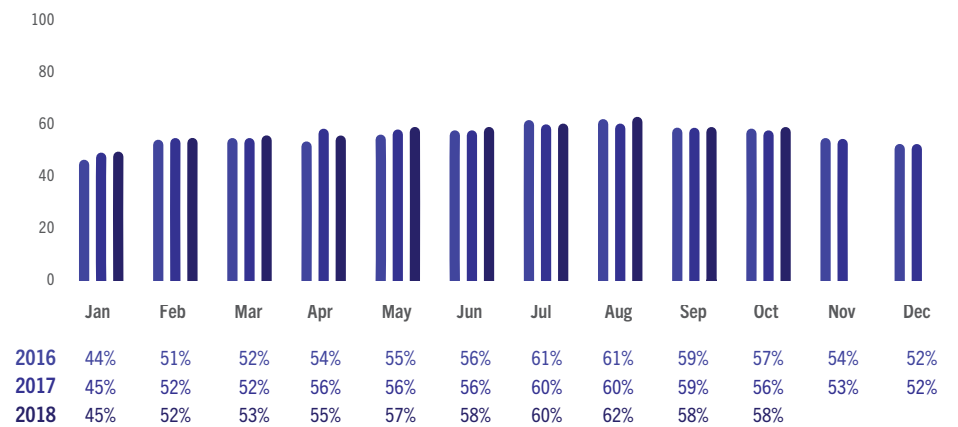


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



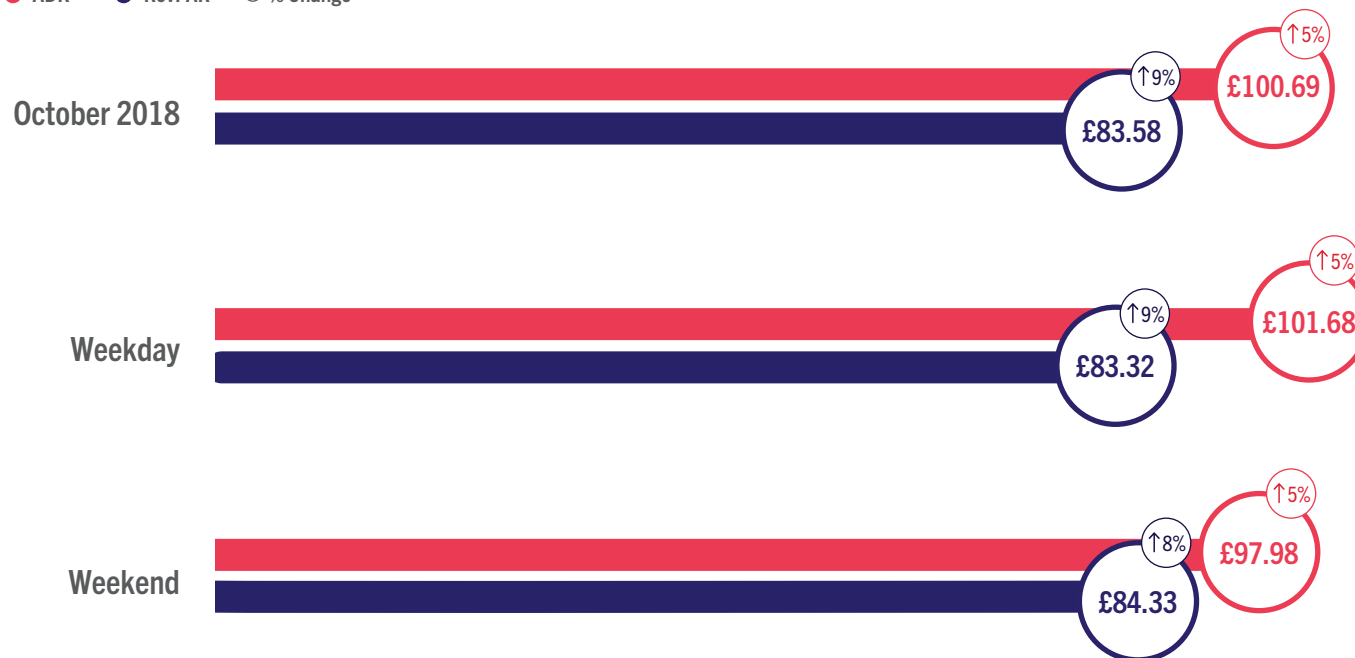
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - October 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
October	£94.28	£95.64	£100.69
Weekday	£94.75	£96.58	£101.68
Weekend	£93.23	£93.10	£97.98

RevPAR

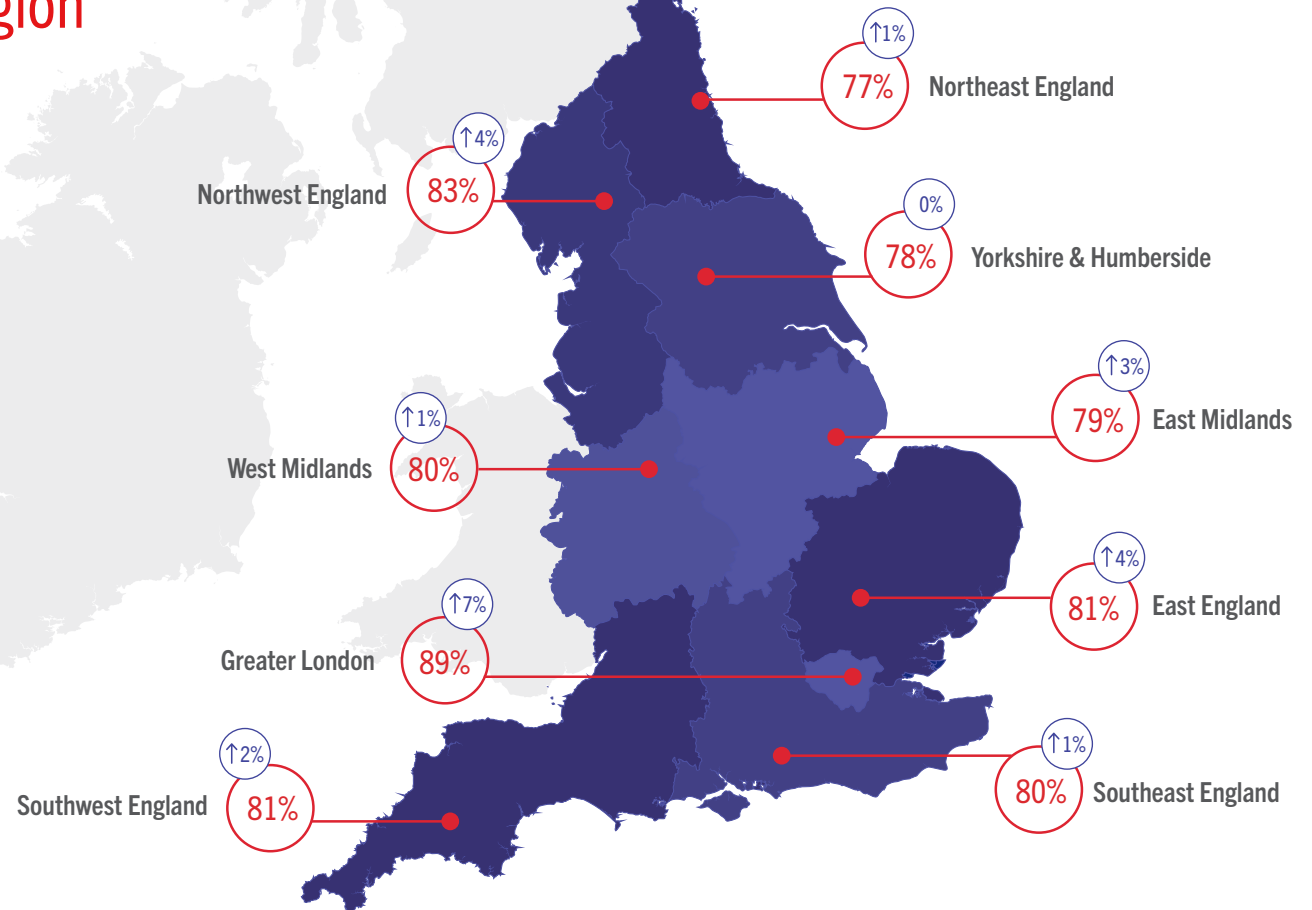
	2016	2017	2018
October	£76.11	£76.78	£83.58
Weekday	£74.80	£76.42	£83.32
Weekend	£79.32	£77.82	£84.33



Room Occupancy By Region

At a glance - October 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	79%	78%	81%
East Midlands	76%	77%	79%
Greater London	85%	84%	89%
Northeast England	76%	76%	77%
Northwest England	82%	80%	83%
Southeast England	79%	80%	80%
Southwest England	79%	79%	81%
West Midlands	79%	80%	80%
Yorkshire & Humberside	79%	78%	78%

Bedspace Occupancy	2016	2017	2018
East England	56%	54%	57%
East Midlands	54%	53%	55%
Greater London	61%	60%	64%
Northeast England	53%	53%	53%
Northwest England	58%	56%	59%
Southeast England	55%	55%	56%
Southwest England	55%	54%	55%
West Midlands	54%	53%	54%
Yorkshire & Humberside	56%	55%	55%

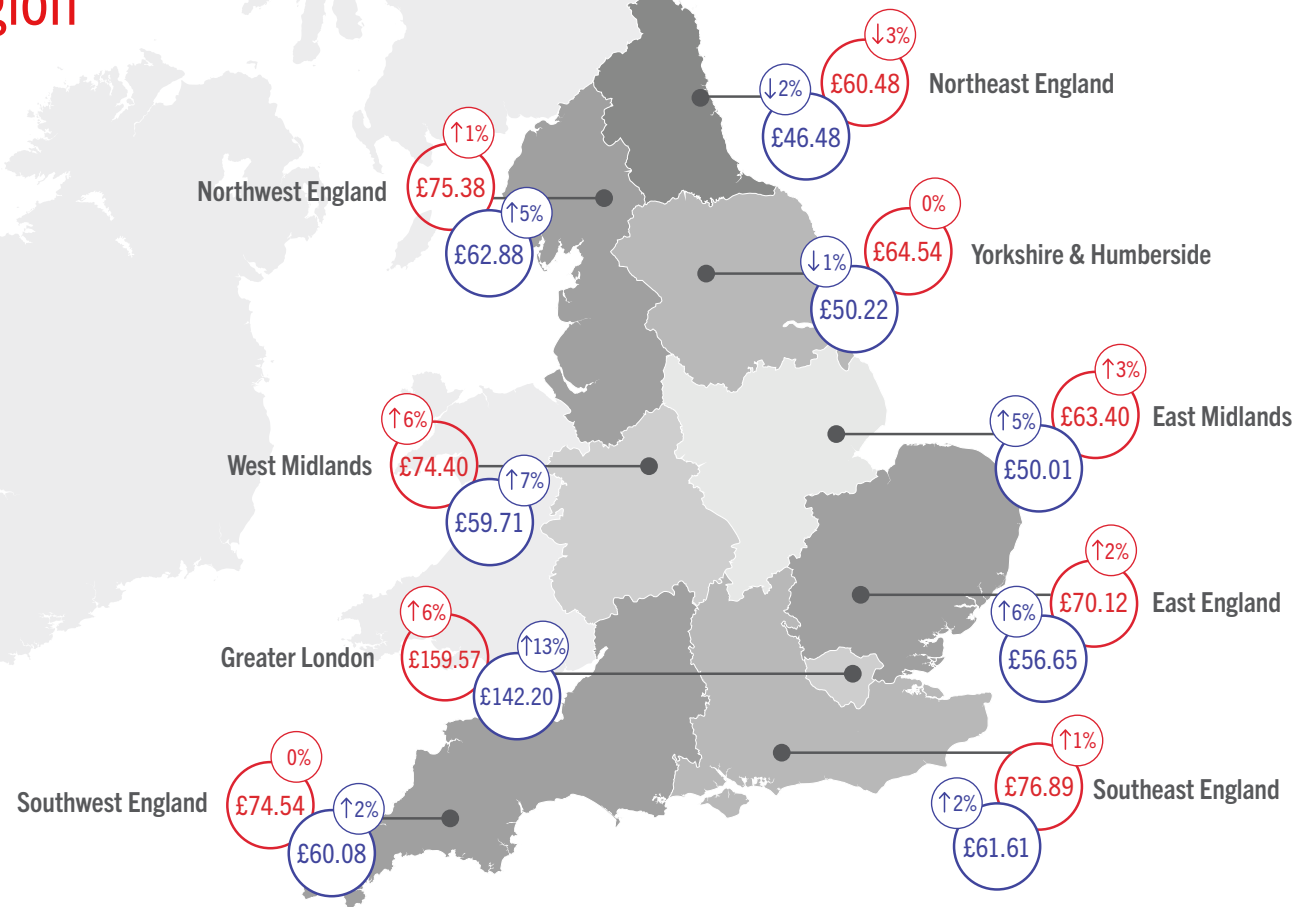


ADR and RevPAR By Region

At a glance - October 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	£68.41	£68.98	£70.12
East Midlands	£60.68	£61.81	£63.40
Greater London	£147.20	£150.36	£159.57
Northeast England	£62.72	£62.04	£60.48
Northwest England	£72.85	£74.52	£75.38
Southeast England	£75.97	£75.98	£76.89
Southwest England	£73.19	£74.37	£74.54
West Midlands	£69.74	£70.19	£74.40
Yorkshire & Humberside	£64.26	£64.85	£64.54

RevPAR	2016	2017	2018
East England	£53.85	£53.56	£56.65
East Midlands	£46.12	£47.53	£50.01
Greater London	£125.18	£125.58	£142.20
Northeast England	£47.47	£47.38	£46.48
Northwest England	£59.67	£59.87	£62.88
Southeast England	£59.68	£60.47	£61.61
Southwest England	£57.61	£58.68	£60.08
West Midlands	£55.37	£55.82	£59.71
Yorkshire & Humberside	£50.58	£50.59	£50.22



Room Occupancy By Destination Type

At a glance - October 2018



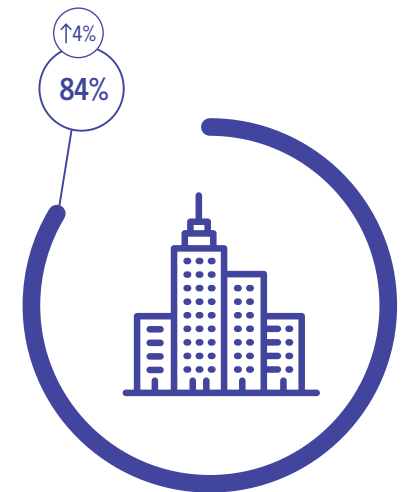
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2016	2017	2018
City / Large Town	82%	81%	84%
Small Town	76%	76%	78%
Countryside	72%	70%	70%
Seaside	78%	78%	79%

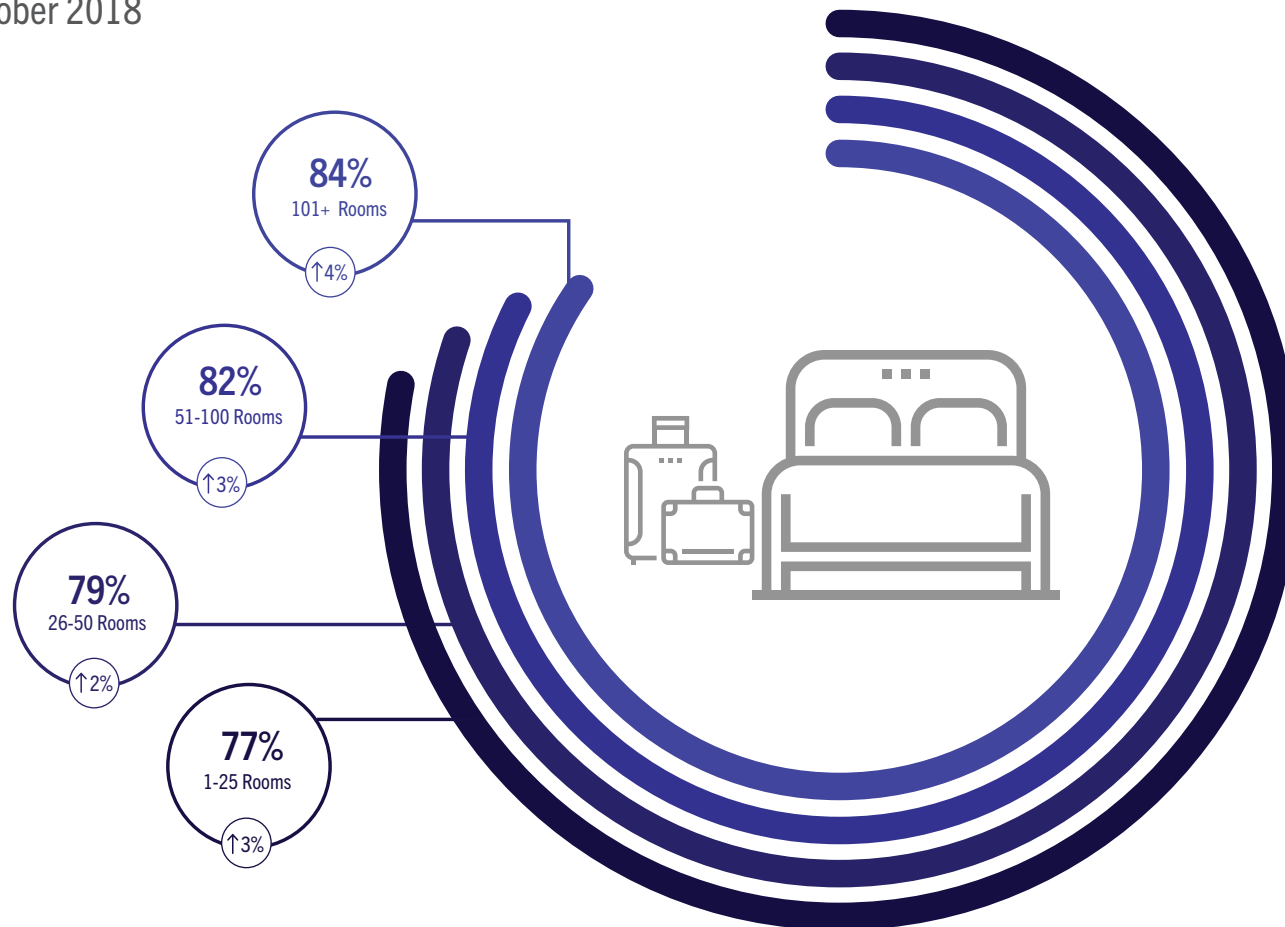
Bedspace Occupancy

	2016	2017	2018
City / Large Town	57%	56%	58%
Small Town	55%	55%	56%
Countryside	50%	48%	47%
Seaside	58%	58%	59%



Room Occupancy By Number of Rooms

At a glance - October 2018



Occupancy By Number of Rooms

Data Tables

Room Occupancy	2016	2017	2018
1-25 Rooms	78%	75%	77%
26-50 Rooms	78%	78%	79%
51-100 Rooms	79%	79%	82%
101+ Rooms	82%	81%	84%

Bedspace Occupancy	2016	2017	2018
1-25 Rooms	57%	54%	56%
26-50 Rooms	56%	55%	56%
51-100 Rooms	58%	58%	59%
101+ Rooms	57%	56%	58%



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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