

England Occupancy Survey

September 2018 Results



Summary of Results

Room occupancy in September was stable at 84% whilst **bedspace occupancy** decreased by -2% to 58% when compared to September 2017. In September there was an increase of +1.6% in **room supply** and an increase of +1.2% 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, decreased by -1% in September to £84.70 compared to the previous year.

City/large town room occupancy was stable at 84% whilst **bedspace occupancy** decreased by -1% to 58%. **Seaside** room occupancy decreased by -2% to 83%, whilst **bedspace occupancy** decreased by -2% to 60%. **Small town** room occupancy decreased by -1% to 80%

and decreased by -1% for **bedspace occupancy** to 57%, with **countryside** decreasing by -1% for room occupancy to 76% and decreasing by -1% for **bedspace occupancy** to 52%.

Looking at occupancy rates by **establishment** size, establishments with 1-25 rooms and 26-50 rooms both decreased by -2% in room occupancy and -1% in **bedspace occupancy**. Establishments with 51-100 rooms and 101+ rooms remained relatively stable with changes of 1% or less for both room and **bedspace occupancy**.

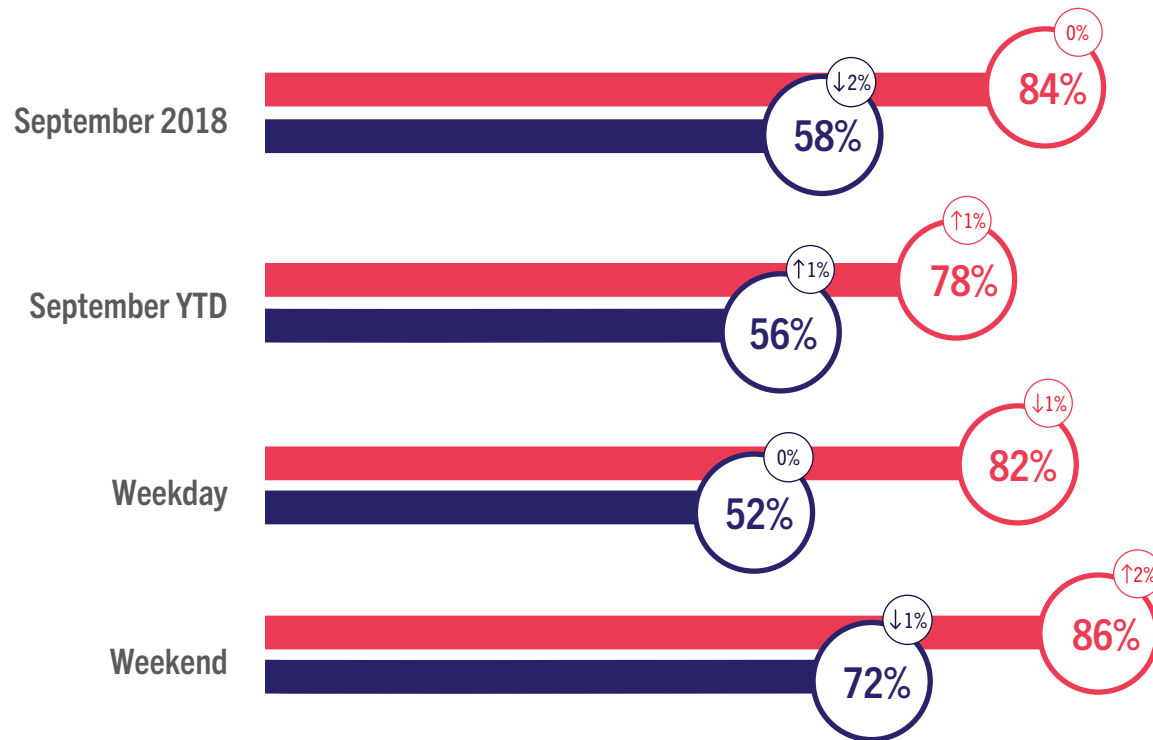
Looking at occupancy rates by **region**, the biggest shifts came from South West and South East, who both decreased by -2% in room occupancy and -2% in **bedspace occupancy**. All other regions were stable with changes of 1% or less for both room and **bedspace occupancy**.



England Room and Bedspace Occupancy

At a glance - September 2018

● Room Space ● Bedspace ⓘ % Change



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
September	85%	84%	84%
September YTD	77%	78%	78%
Weekday	84%	84%	82%
Weekend	86%	85%	86%

Bedspace Occupancy	2016	2017	2018
September	59%	59%	58%
September YTD	55%	55%	56%
Weekday	53%	52%	52%
Weekend	73%	73%	72%

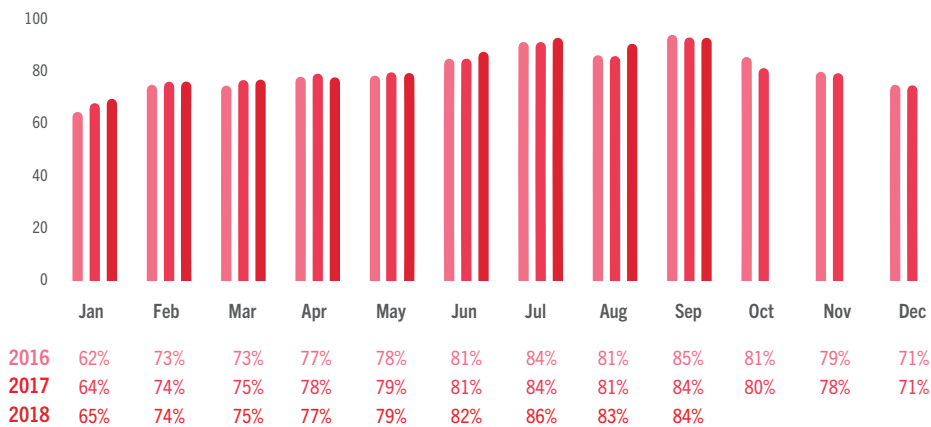
	2016	2017	2018
Room supply	1.4%	2.0%	1.6%
Room demand	1.0%	1.1%	1.2%

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

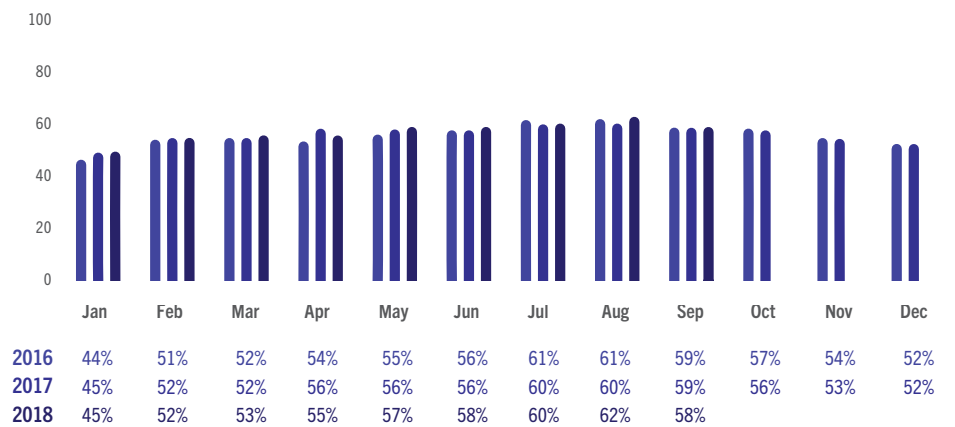


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



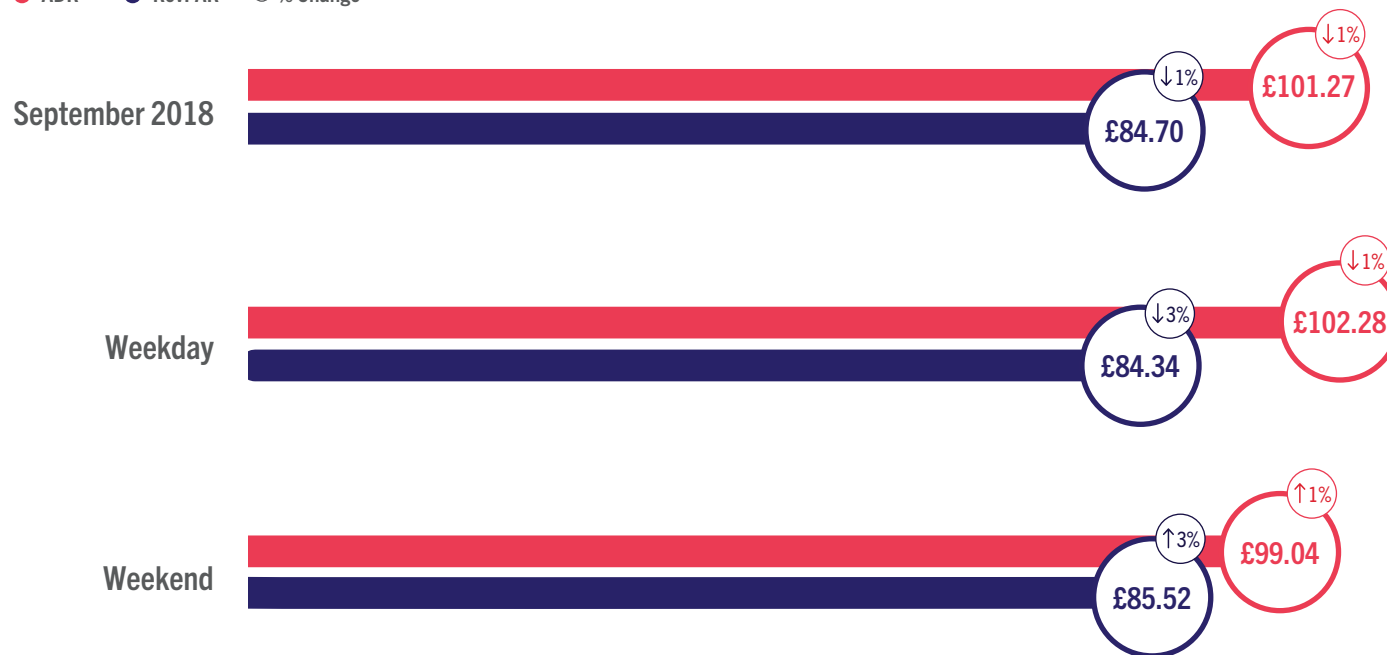
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - September 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
September	£100.14	£101.82	£101.27
Weekday	£101.61	£103.82	£102.28
Weekend	£96.79	£97.86	£99.04

RevPAR

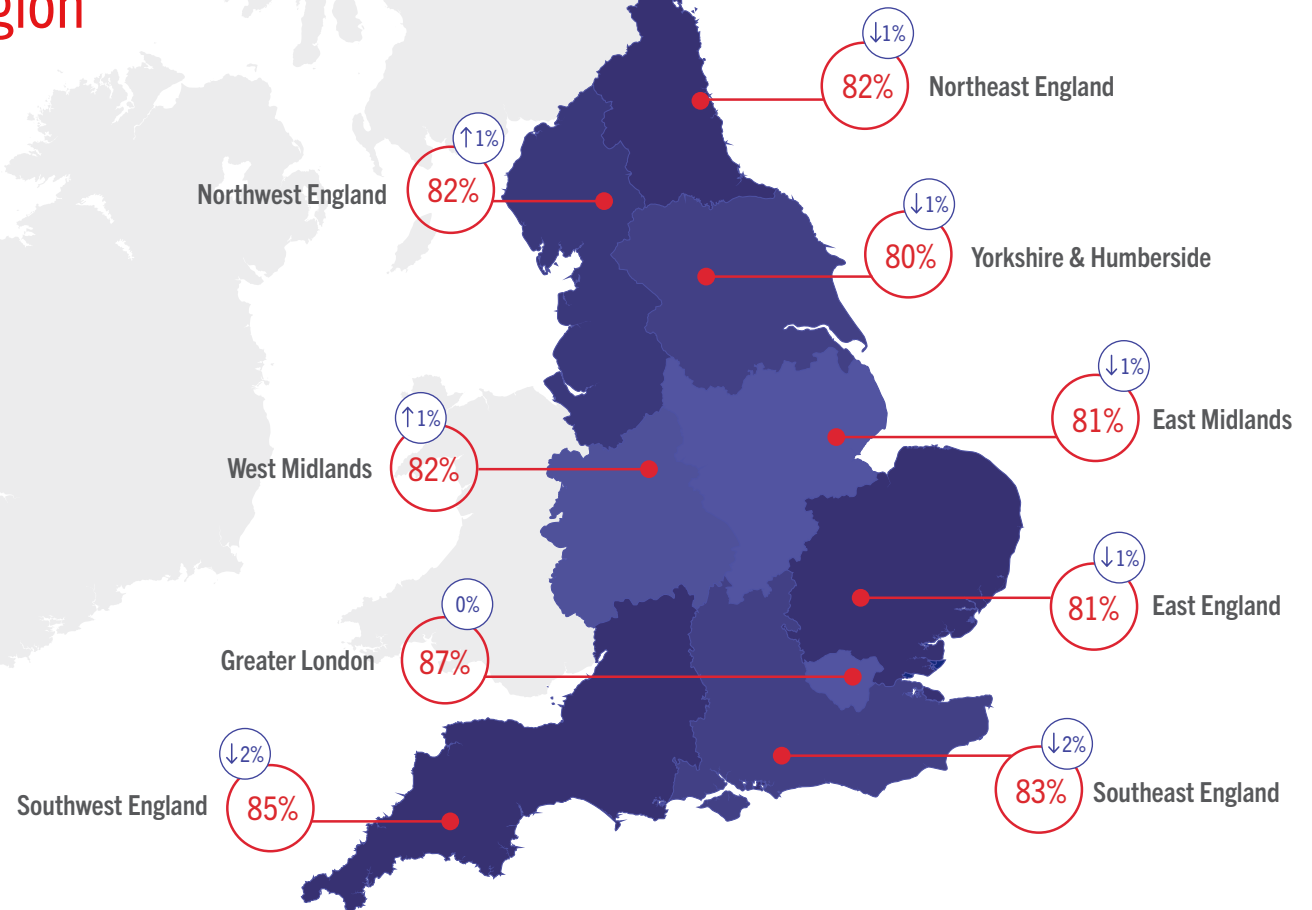
	2016	2017	2018
September	£84.92	£85.54	£84.70
Weekday	£85.51	£86.82	£84.34
Weekend	£83.54	£83.00	£85.52



Room Occupancy By Region

At a glance - September 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%	82%	81%
East Midlands	80%	81%	81%
Greater London	89%	87%	87%
Northeast England	78%	83%	82%
Northwest England	83%	81%	82%
Southeast England	84%	85%	83%
Southwest England	87%	87%	85%
West Midlands	81%	81%	82%
Yorkshire & Humberside	83%	81%	80%

Bedspace Occupancy	2016	2017	2018
East England	58%	58%	57%
East Midlands	56%	57%	56%
Greater London	63%	62%	61%
Northeast England	55%	58%	57%
Northwest England	58%	57%	57%
Southeast England	59%	59%	57%
Southwest England	60%	61%	59%
West Midlands	55%	55%	55%
Yorkshire & Humberside	59%	58%	57%

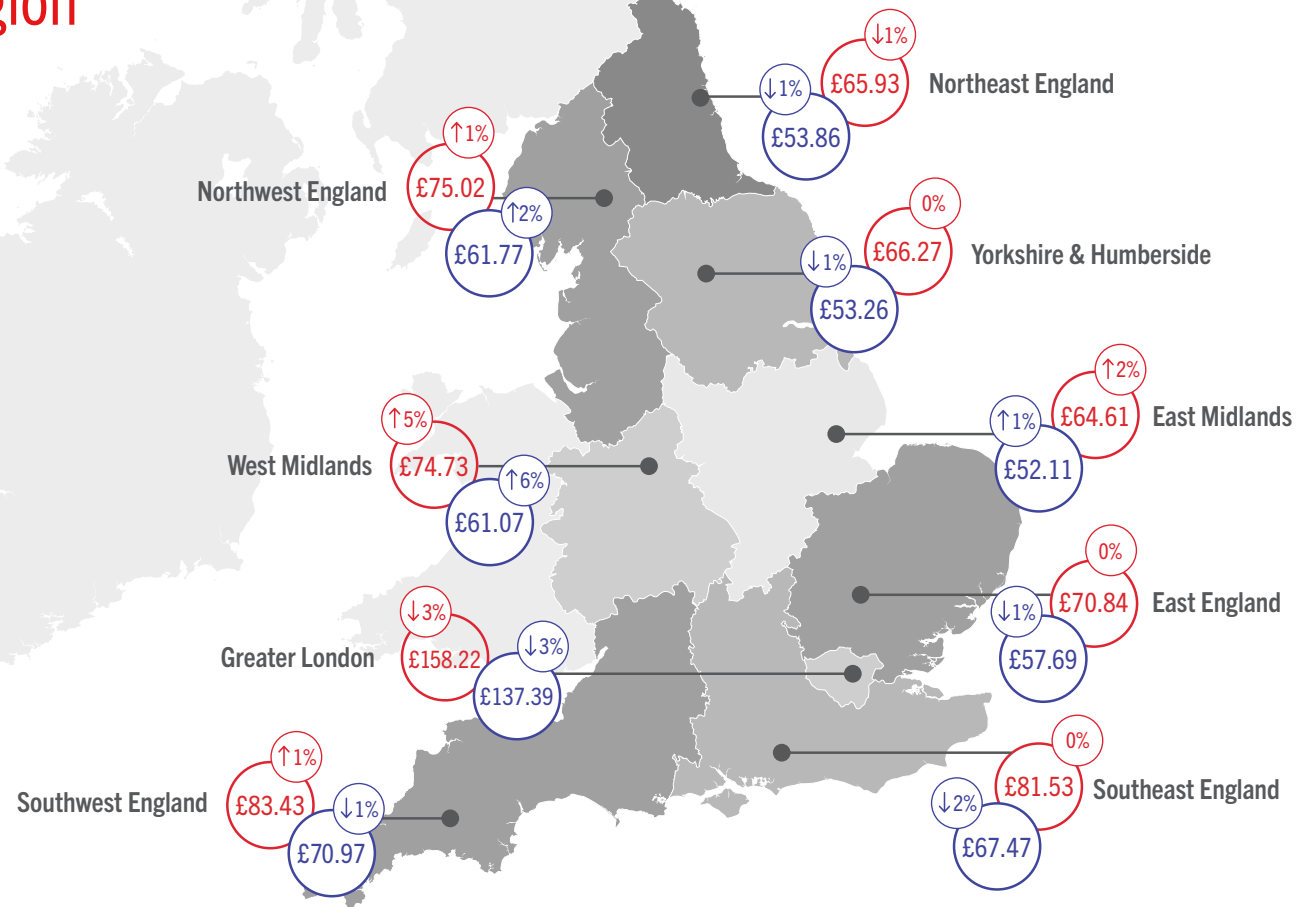


ADR and RevPAR By Region

At a glance - September 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	£69.27	£71.13	£70.84
East Midlands	£61.48	£63.56	£64.61
Greater London	£161.27	£163.33	£158.22
Northeast England	£64.61	£66.27	£65.93
Northwest England	£73.62	£74.28	£75.02
Southeast England	£81.32	£81.69	£81.53
Southwest England	£79.71	£82.71	£83.43
West Midlands	£68.39	£71.07	£74.73
Yorkshire & Humberside	£64.47	£66.30	£66.27

RevPAR	2016	2017	2018
East England	£57.05	£58.25	£57.69
East Midlands	£49.42	£51.52	£52.11
Greater London	£143.67	£141.75	£137.39
Northeast England	£50.54	£54.67	£53.86
Northwest England	£61.07	£60.45	£61.77
Southeast England	£68.50	£69.05	£67.47
Southwest England	£69.37	£71.61	£70.97
West Midlands	£55.68	£57.77	£61.07
Yorkshire & Humberside	£53.27	£53.66	£53.26



Room Occupancy By Destination Type

At a glance - September 2018



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2016	2017	2018
City / Large Town	85%	84%	84%
Small Town	82%	81%	80%
Countryside	80%	77%	76%
Seaside	85%	84%	83%

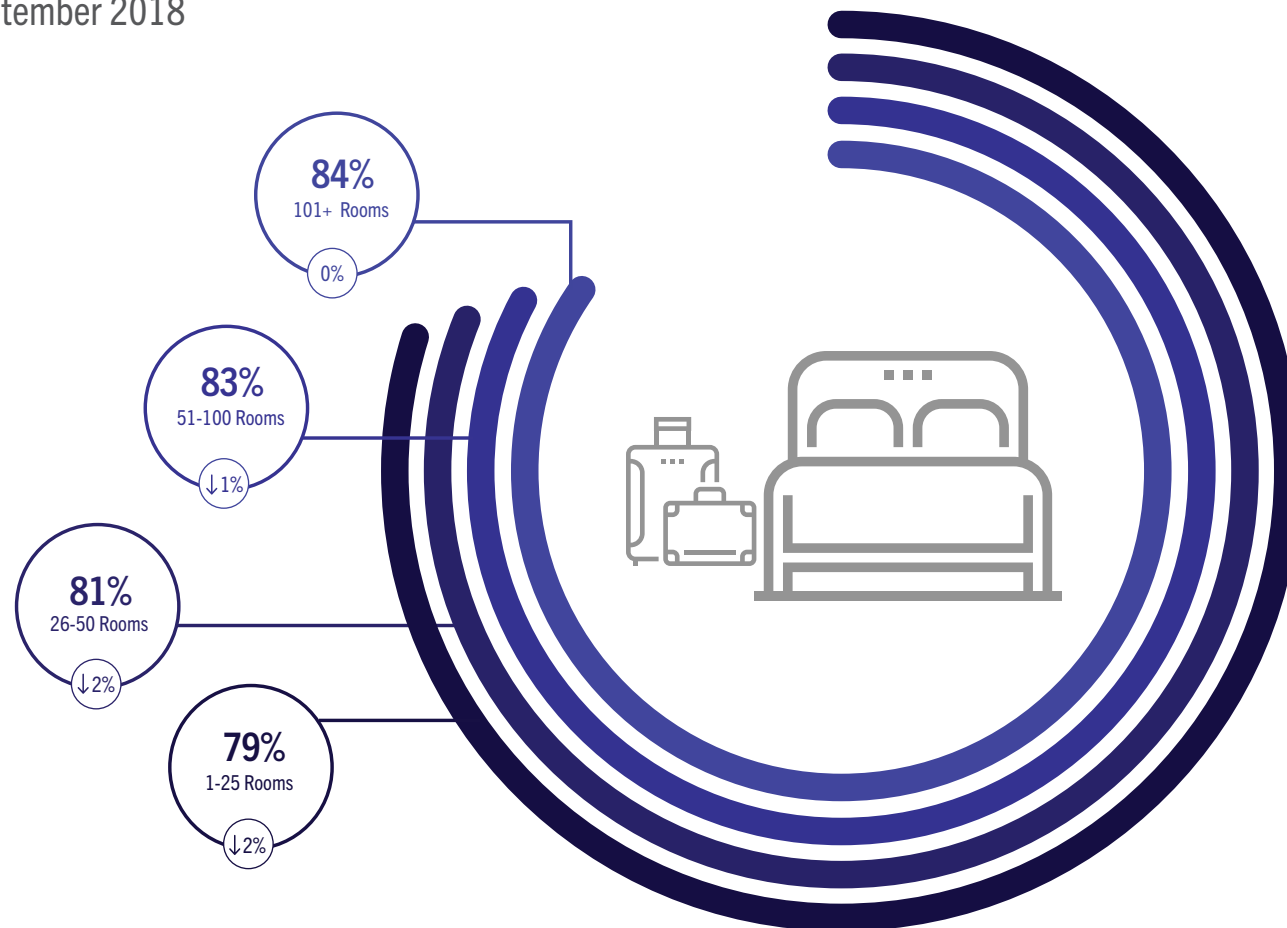
Bedspace Occupancy

	2016	2017	2018
City / Large Town	59%	59%	58%
Small Town	58%	58%	57%
Countryside	54%	53%	52%
Seaside	62%	62%	60%



Room Occupancy By Number of Rooms

At a glance - September 2018



Occupancy By Number of Rooms

Data Tables

Room Occupancy	2016	2017	2018
1-25 Rooms	83%	81%	79%
26-50 Rooms	83%	83%	81%
51-100 Rooms	83%	83%	83%
101+ Rooms	86%	85%	84%

Bedspace Occupancy	2016	2017	2018
1-25 Rooms	60%	58%	57%
26-50 Rooms	59%	59%	58%
51-100 Rooms	61%	61%	60%
101+ Rooms	59%	59%	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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