

England Occupancy Survey

January 2018 Results



Summary of Results

Room occupancy in January has increased **+1%** to 65%, whilst bedspace occupancy increased by **+1%** when compared to January 2017 to 45%. The change in room occupancy was led by an increase in **room supply** of 1.9% compared to an increase of 2.5% 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 January at £54.35 compared to the previous year.

City/large town room occupancy remained unchanged at 66% whilst bedspace remained the same at 45%. **Seaside** increased by +2% to 57% for room occupancy and increased by +2% to 42% for bedspace occupancy. **Small town** room occupancy increased +1% to 58% and remained unchanged for bedspace occupancy at 41%, with **countryside** occupancy decreasing -1% for room occupancy to 51% while bedspace occupancy remained unchanged at 35%.

Looking at room occupancy rates by **establishment size** all categories remained relatively unchanged with changes of 1% or less except for 26-50 rooms which increased by 2% to 62%.

For bedspace, all categories remained relatively unchanged with changes of 1% or less.

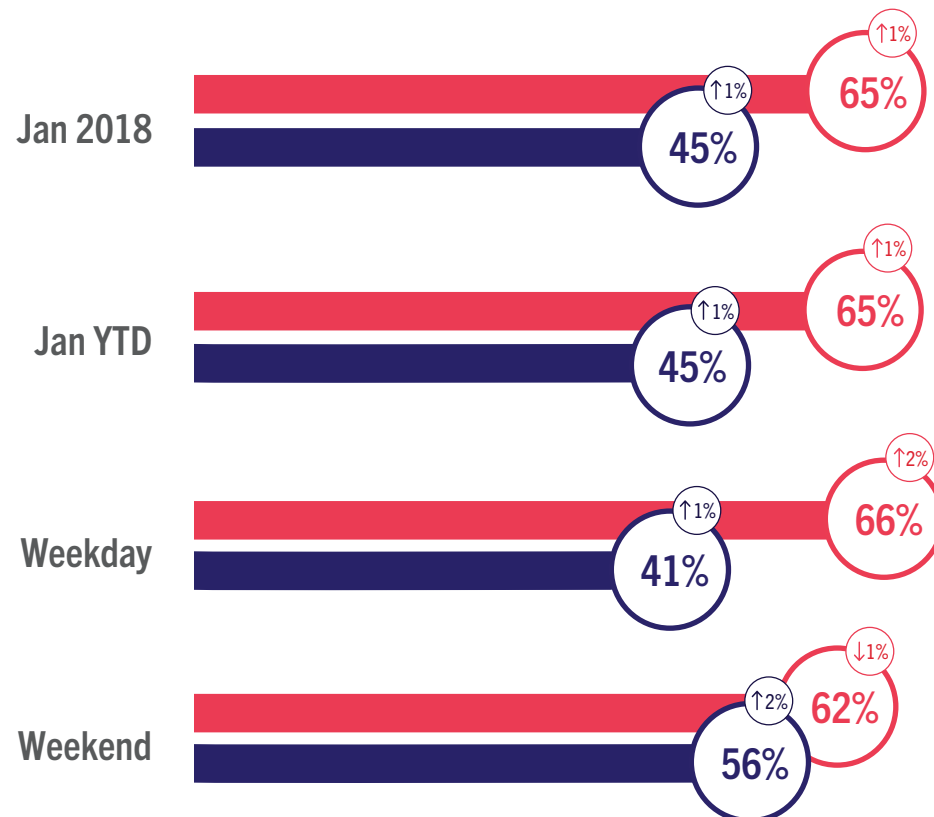
Looking at occupancy by **region**, the largest shift for room occupancy came from the East Midlands, the West Midlands and the South West with a +2% increase. All other regions remained relatively unchanged with a 1% or less change. For bedspace occupancy, only the West Midlands grew by +2% whereas all other regions remained relatively unchanged with 1% or less change.



England Room and Bedspace Occupancy

At a glance - January 2018

● Room Space ● Bedspace ⓘ % Change





England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
Jan	62%	64%	65%
Jan YTD	62%	64%	65%
Weekday	63%	65%	66%
Weekend	60%	63%	62%

Bedspace Occupancy	2016	2017	2018
Jan	44%	45%	45%
Jan YTD	44%	45%	45%
Weekday	39%	40%	41%
Weekend	54%	55%	56%

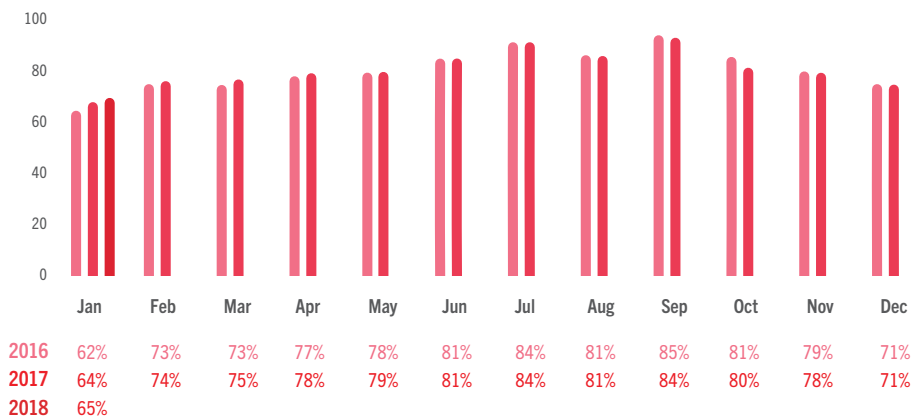
	2016	2017	2018
Room supply	1.3%	1.7%	1.9%
Room demand	-0.4%	5.0%	2.5%

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

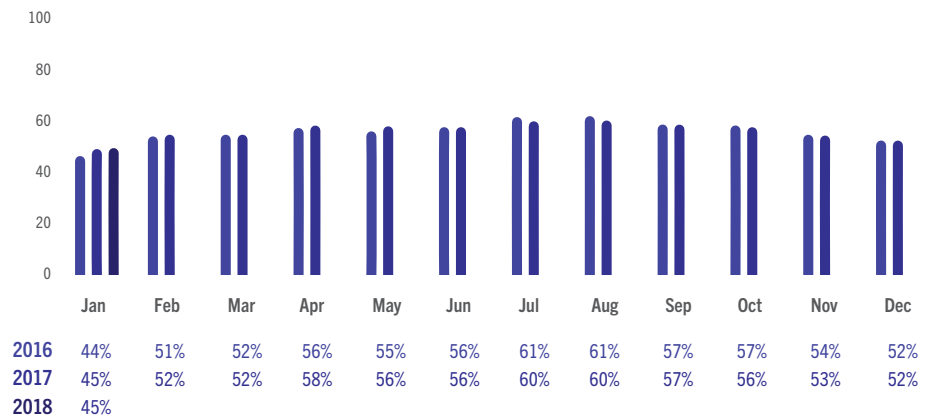


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - January 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
Jan	£79.87	£83.13	£83.96
Weekday	£81.29	£84.25	£85.52
Weekend	£76.74	£79.81	£79.21

RevPAR

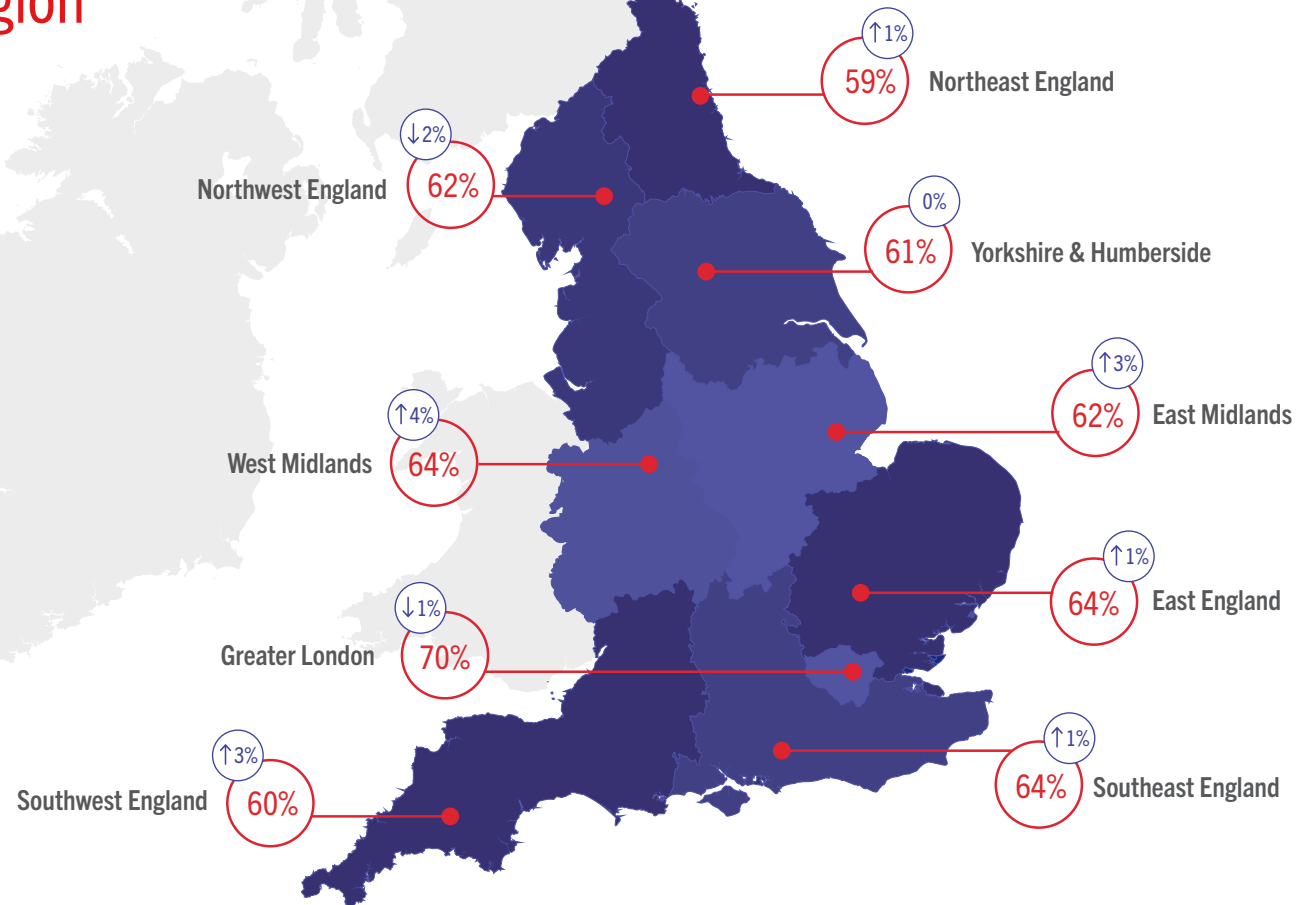
	2016	2017	2018
Jan	£49.79	£53.48	£54.35
Weekday	£51.54	£54.58	£56.12
Weekend	£46.11	£50.30	£49.24



Room Occupancy By Region

At a glance - January 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 - January 2018

Room Occupancy	2016	2017	2018
East England	61%	63%	64%
East Midlands	60%	60%	62%
Greater London	67%	71%	70%
Northeast England	56%	58%	59%
Northwest England	62%	63%	62%
Southeast England	61%	63%	64%
Southwest England	59%	58%	60%
West Midlands	60%	62%	64%
Yorkshire & Humberside	60%	61%	61%

Bedspace Occupancy	2016	2017	2018
East England	43%	44%	45%
East Midlands	42%	42%	42%
Greater London	47%	50%	50%
Northeast England	39%	40%	41%
Northwest England	43%	44%	43%
Southeast England	43%	44%	44%
Southwest England	41%	40%	41%
West Midlands	41%	41%	43%
Yorkshire & Humberside	43%	43%	43%

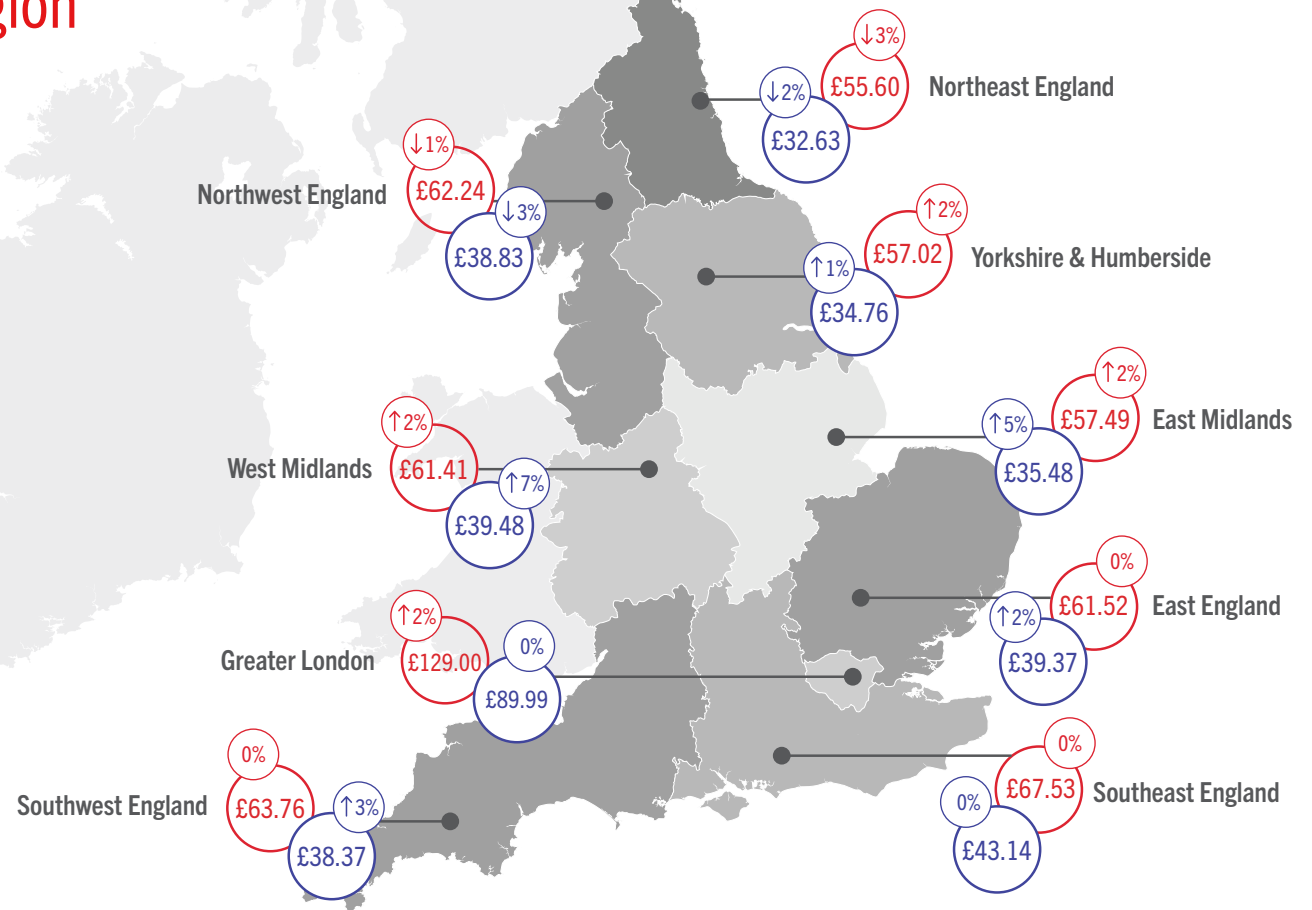


ADR and RevPAR By Region

At a glance - January 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 - January 2018

ADR	2016	2017	2018
East England	£58.93	£61.10	£61.52
East Midlands	£54.61	£56.33	£57.49
Greater London	£120.48	£127.14	£129.00
Northeast England	£57.37	£57.24	£55.60
Northwest England	£61.09	£63.01	£62.24
Southeast England	£67.04	£67.94	£67.53
Southwest England	£62.06	£63.51	£63.76
West Midlands	£58.20	£60.08	£61.41
Yorkshire & Humberside	£55.09	£55.99	£57.02

RevPAR	2016	2017	2018
East England	£36.06	£38.55	£39.37
East Midlands	£32.61	£33.92	£35.48
Greater London	£80.33	£89.67	£89.99
Northeast England	£32.15	£33.20	£32.63
Northwest England	£37.85	£39.96	£38.83
Southeast England	£40.92	£42.81	£43.14
Southwest England	£36.92	£37.07	£38.37
West Midlands	£34.87	£37.02	£39.48
Yorkshire & Humberside	£33.31	£34.39	£34.76



Room Occupancy By Destination Type

At a glance - January 2018



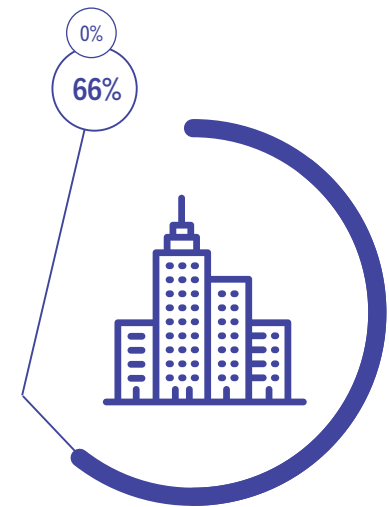
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables - January 2018

Room Occupancy

	2016	2017	2018
City / Large Town	64%	66%	66%
Small Town	56%	57%	58%
Countryside	51%	52%	51%
Seaside	55%	55%	57%

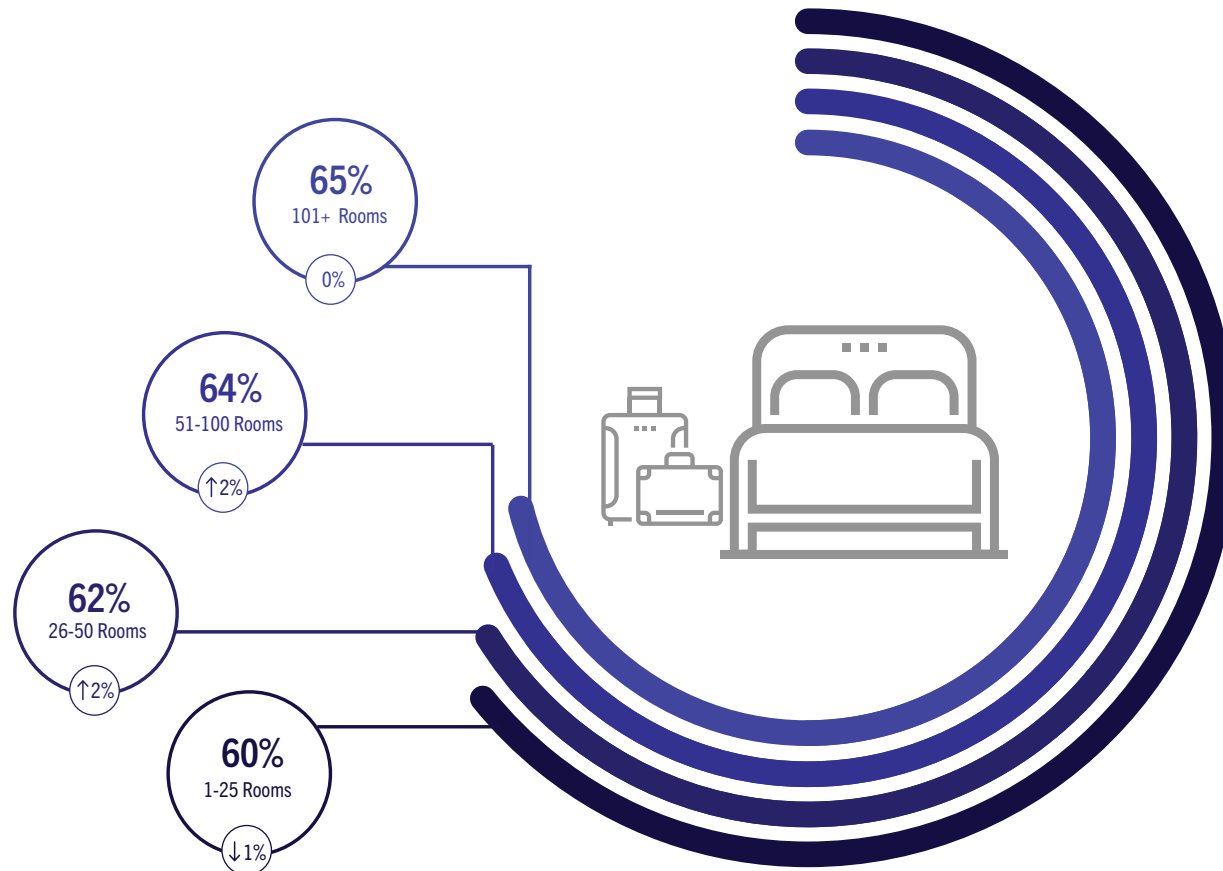
Bedspace Occupancy

	2016	2017	2018
City / Large Town	44%	45%	45%
Small Town	40%	41%	41%
Countryside	35%	35%	35%
Seaside	40%	40%	42%



Room Occupancy By Number of Rooms

At a glance - January 2018



Occupancy By Number of Rooms

Data Tables - January 2018

Room Occupancy	2016	2017	2018
1-25 Rooms	62%	60%	60%
26-50 Rooms	60%	60%	62%
51-100 Rooms	61%	63%	64%
101+ Rooms	63%	65%	65%

Bedspace Occupancy	2016	2017	2018
1-25 Rooms	44%	43%	43%
26-50 Rooms	43%	43%	44%
51-100 Rooms	45%	45%	46%
101+ Rooms	44%	45%	45%



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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