

England Occupancy Survey

February 2018 Results



Summary of Results

Room occupancy in February has remained unchanged at 74%, whilst bedspace occupancy also remained unchanged when compared to February 2017 at 52%. The change in room occupancy was led by an increase in **room supply** of 1.5% compared to a decrease of -0.7% 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 £63.89 compared to the previous year.

City/large town room occupancy decreased 1% to 74% whilst bedspace remained the same at 52%. **Seaside** increased by +2% to 70% for room occupancy and increased by +2% to 53% for bedspace occupancy. **Small town** room occupancy increased +1% to 68% and remained unchanged

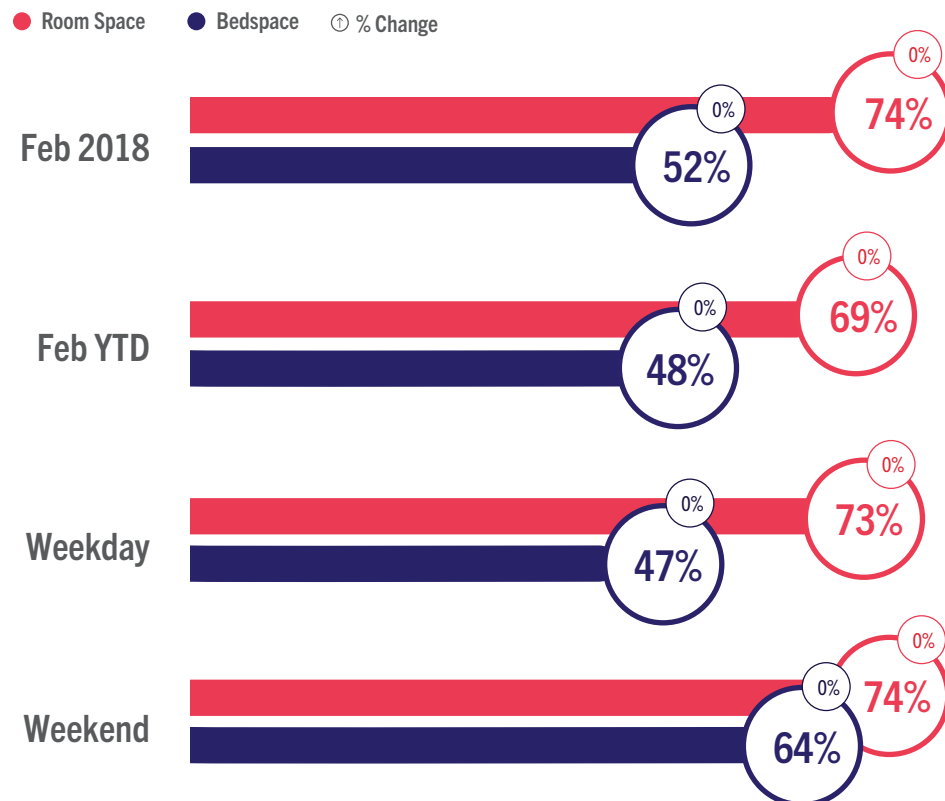
for bedspace occupancy at 49%, with countryside occupancy decreasing -1% for room occupancy to 63% while bedspace occupancy decreased -1% to 43%.

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 decreased by 2% to 68%. 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 Yorkshire & Humberside with a -3% decrease. All other regions remained relatively unchanged with a 1% or less change. For bedspace occupancy, only Yorkshire & Humberside declined by -3% whereas all other regions remained relatively unchanged with 1% or less change.

England Room and Bedspace Occupancy

At a glance



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
Feb	73%	74%	74%
Feb YTD	67%	69%	69%
Weekday	73%	74%	73%
Weekend	74%	74%	74%

Bedspace Occupancy	2016	2017	2018
Feb	51%	52%	52%
Feb YTD	47%	48%	48%
Weekday	47%	47%	47%
Weekend	64%	65%	64%

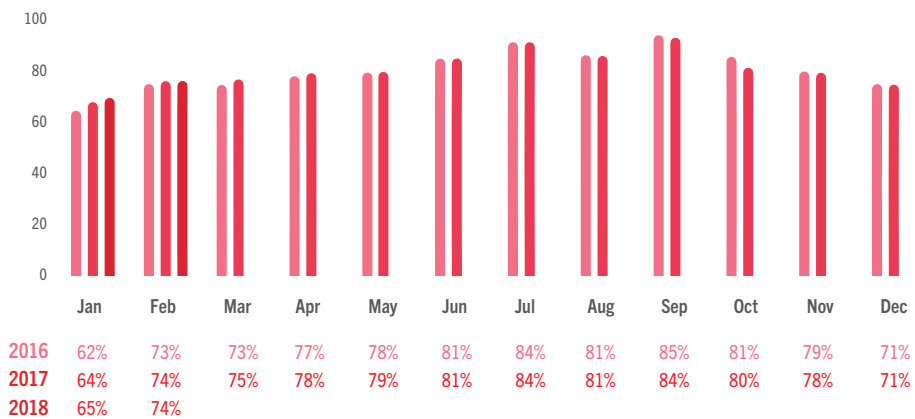
	2016	2017	2018
Room supply	1.5%	1.7%	1.6%
Room demand	-0.7%	2.9%	1.4%

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

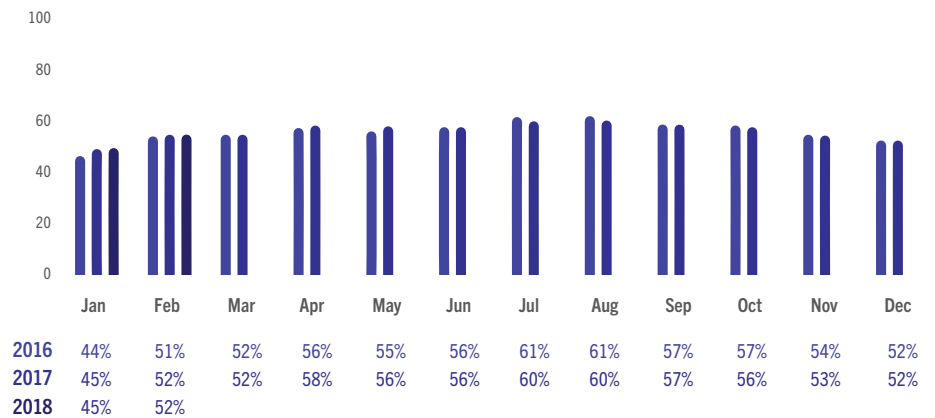


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - February 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
Feb	£83.35	£85.99	£86.89
Weekday	£84.63	£87.19	£88.77
Weekend	£80.05	£83.01	£82.22

RevPAR

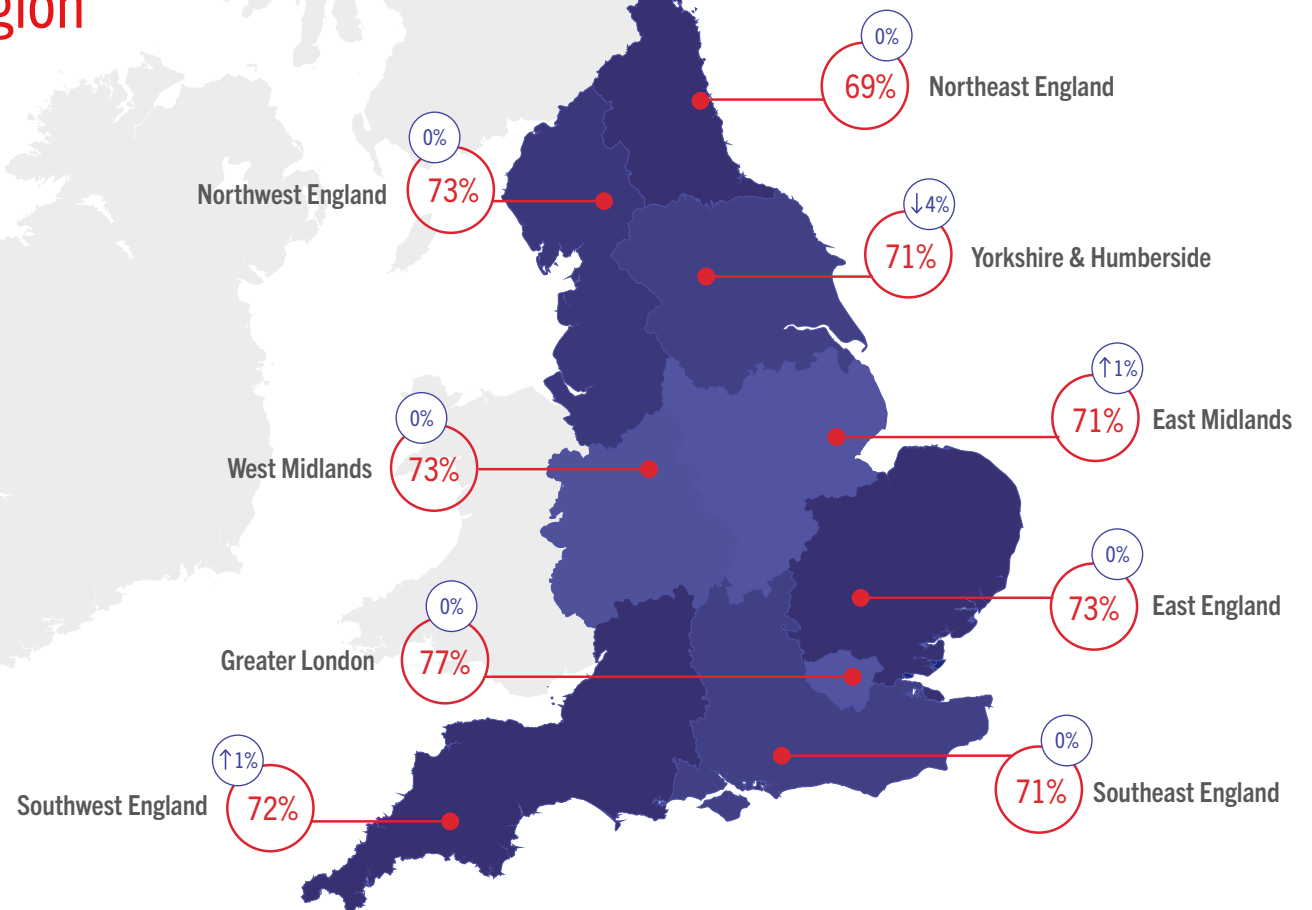
	2016	2017	2018
Feb	£60.72	£63.36	£63.89
Weekday	£61.42	£64.14	£65.11
Weekend	£58.90	£61.40	£60.83



Room Occupancy By Region

At a glance - February 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	72%	73%	73%
East Midlands	71%	70%	71%
Greater London	76%	78%	77%
Northeast England	69%	69%	69%
Northwest England	73%	73%	73%
Southeast England	71%	71%	71%
Southwest England	71%	71%	72%
West Midlands	73%	73%	73%
Yorkshire & Humberside	72%	74%	71%

Bedspace Occupancy	2016	2017	2018
East England	51%	52%	52%
East Midlands	50%	49%	50%
Greater London	55%	56%	56%
Northeast England	48%	48%	48%
Northwest England	52%	52%	52%
Southeast England	50%	50%	50%
Southwest England	50%	49%	50%
West Midlands	49%	50%	50%
Yorkshire & Humberside	51%	53%	50%

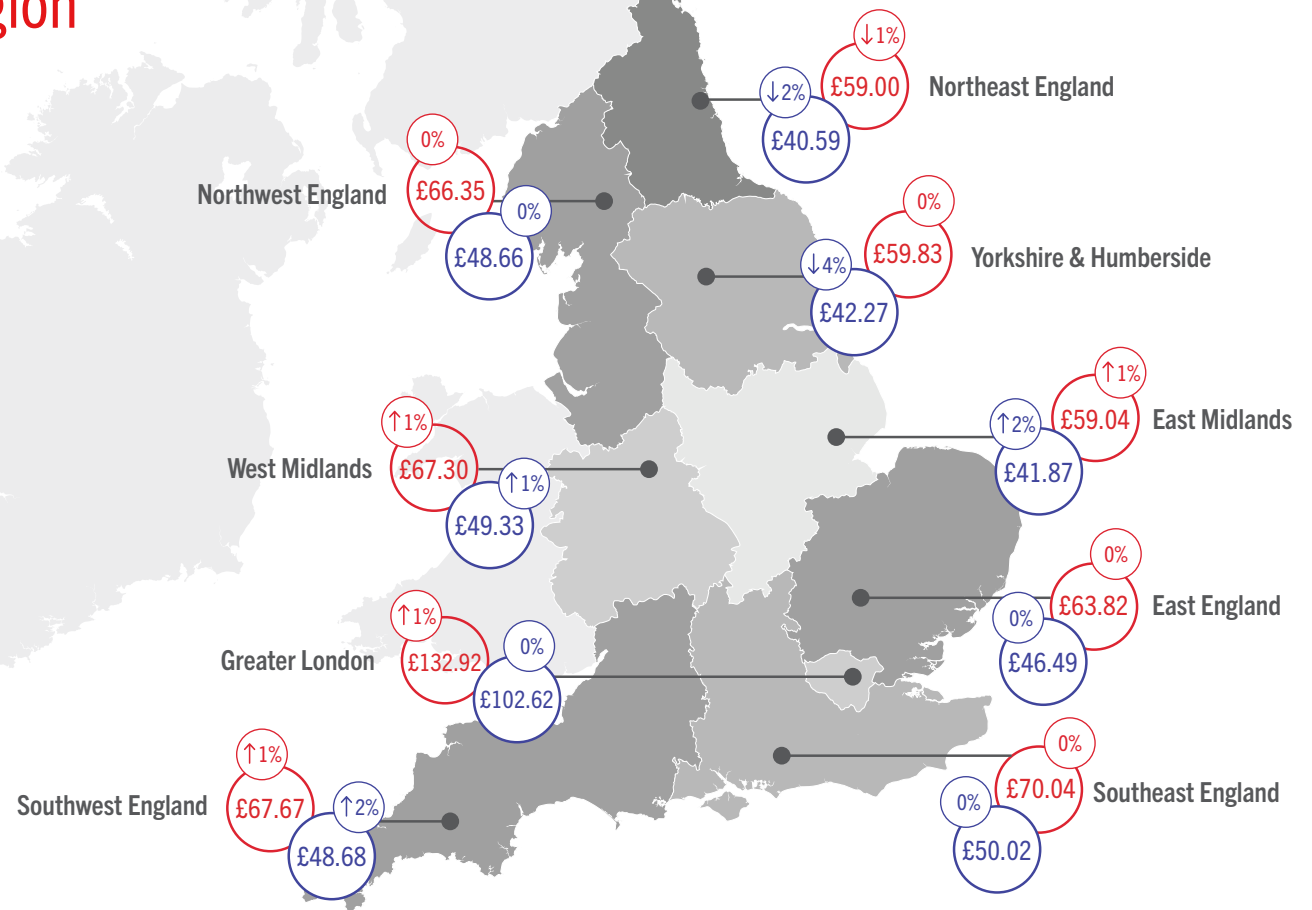


ADR and RevPAR By Region

At a glance - February 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

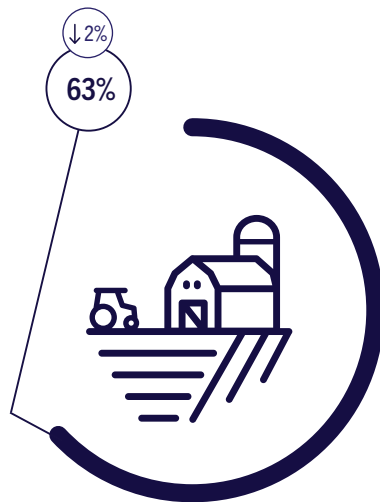
ADR	2016	2017	2018
East England	£61.62	£63.62	£63.82
East Midlands	£56.44	£58.32	£59.04
Greater London	£125.79	£131.61	£132.92
Northeast England	£60.61	£60.05	£59.00
Northwest England	£65.71	£66.45	£66.35
Southeast England	£69.40	£70.41	£70.04
Southwest England	£65.97	£67.02	£67.67
West Midlands	£64.45	£66.39	£67.30
Yorkshire & Humberside	£59.39	£59.89	£59.83

RevPAR	2016	2017	2018
East England	£44.32	£46.58	£46.49
East Midlands	£40.12	£40.88	£41.87
Greater London	£95.16	£102.05	£102.62
Northeast England	£41.78	£41.40	£40.59
Northwest England	£47.90	£48.75	£48.66
Southeast England	£49.21	£50.18	£50.02
Southwest England	£47.17	£47.56	£48.68
West Midlands	£46.85	£48.80	£49.33
Yorkshire & Humberside	£42.82	£44.09	£42.27



Room Occupancy By Destination Type

At a glance - February 2018



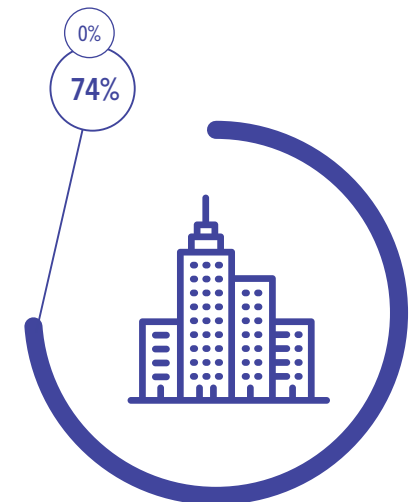
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2016	2017	2018
City / Large Town	74%	75%	74%
Small Town	67%	67%	68%
Countryside	64%	64%	63%
Seaside	67%	68%	70%

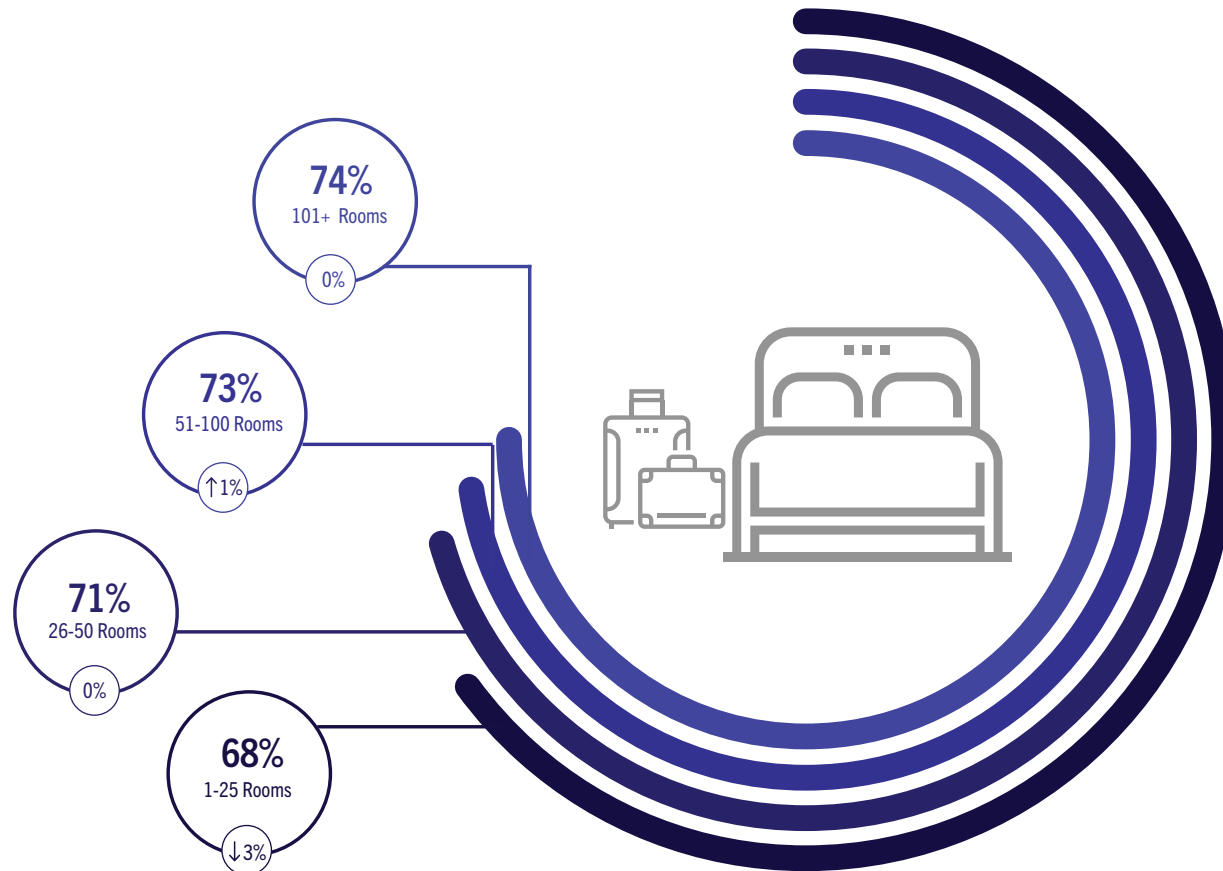
Bedspace Occupancy

	2016	2017	2018
City / Large Town	52%	52%	52%
Small Town	49%	49%	49%
Countryside	44%	44%	43%
Seaside	50%	51%	53%



Room Occupancy By Number of Rooms

At a glance - February 2018



Occupancy By Number of Rooms

Data Tables

Room Occupancy	2016	2017	2018
1-25 Rooms	72%	70%	68%
26-50 Rooms	71%	70%	71%
51-100 Rooms	72%	72%	73%
101+ Rooms	73%	75%	74%

Bedspace Occupancy	2016	2017	2018
1-25 Rooms	53%	51%	50%
26-50 Rooms	51%	51%	51%
51-100 Rooms	53%	53%	54%
101+ Rooms	51%	52%	52%



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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