

England Occupancy Survey

July 2018 Results



Summary of Results

Room occupancy in July increased by +2% to 86% whilst bedspace occupancy increased by +1% when compared to July 2017 to 60%. The change in room occupancy was led by an increase in **room supply** of 1.4% and an increase of 3.1% 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 6% in July to £91.15 compared to the previous year.

City/large town room occupancy increased by +2% to 86% whilst bedspace occupancy increased by 1% to 60%. **Seaside** room occupancy increased by 2% to 88%, whilst bedspace occupancy was stable at 66%.

Small town room occupancy increased 2% to 82% and was stable at 59% for bedspace occupancy, with **countryside** decreasing by -1% for both room and bedspace occupancy, at 77% and 53% respectively.

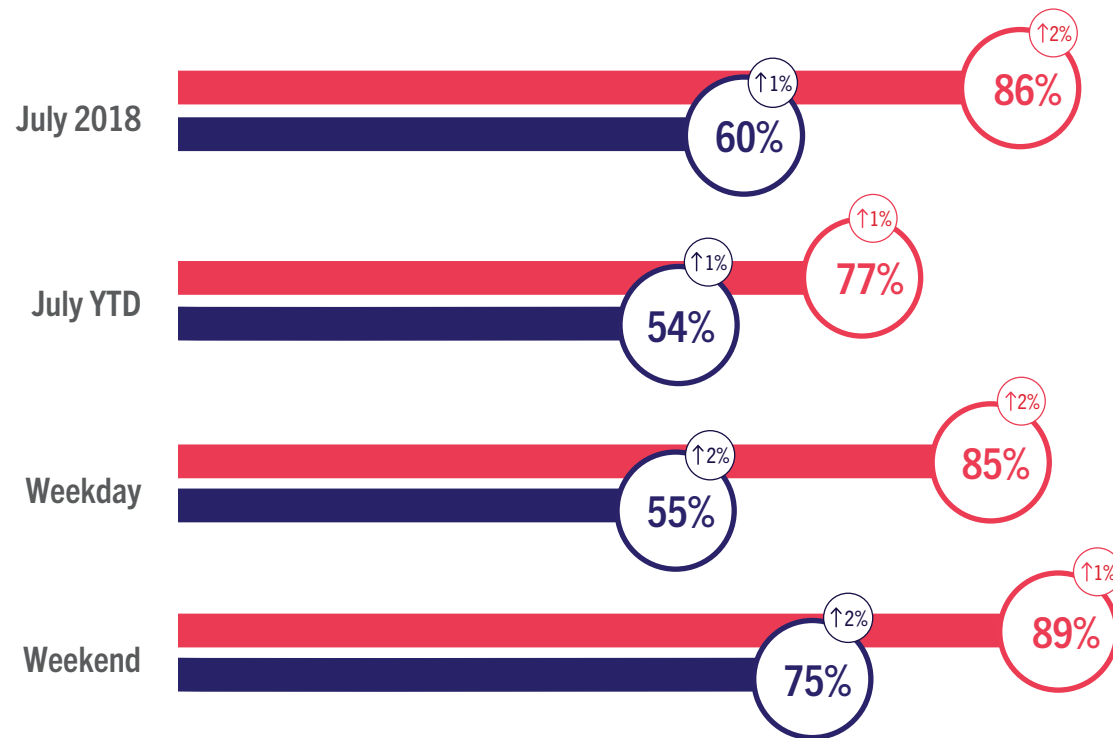
Looking at occupancy rates by **establishment** size, larger establishments with 101+ rooms increased by +2% in room occupancy and 1% in bedspace occupancy. All other categories remained relatively stable with changes of 1% or less for both room and bedspace occupancy.

Looking at occupancy rates by **region**, London increased to the greatest extent, by +4% in room occupancy and 2% in bedspace occupancy. East Midlands decreased to the greatest extent, by -2% in room occupancy and 1% in bedspace occupancy.

England Room and Bedspace Occupancy

At a glance - July 2018

● Room Space ● Bedspace ⓘ % Change



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
July	84%	84%	86%
July YTD	76%	76%	77%
Weekday	83%	83%	85%
Weekend	88%	88%	89%

Bedspace Occupancy	2016	2017	2018
July	61%	60%	60%
July YTD	53%	54%	54%
Weekday	55%	54%	55%
Weekend	74%	74%	75%

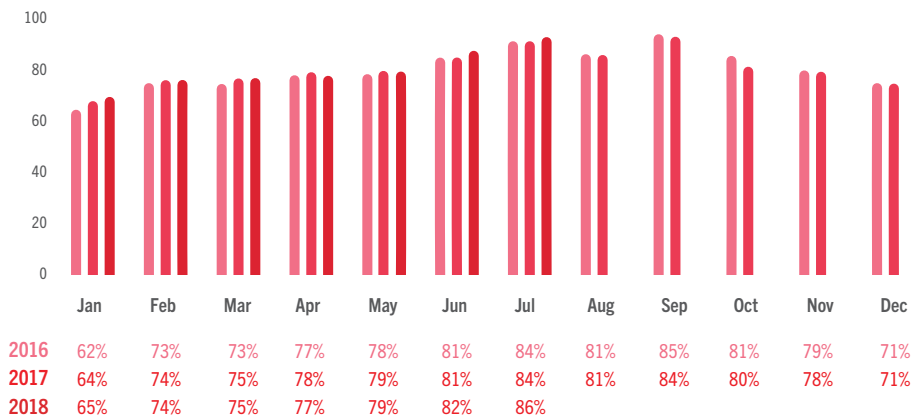
	2016	2017	2018
Room supply	1.5%	1.8%	1.4%
Room demand	1.5%	1.6%	3.1%

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

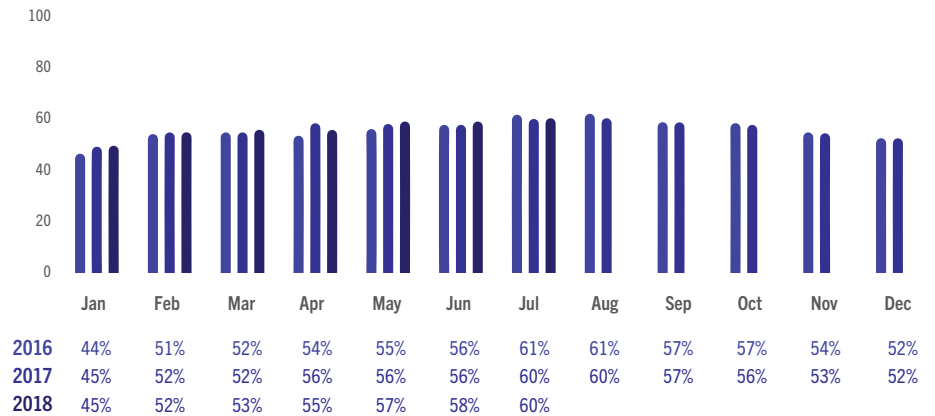


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



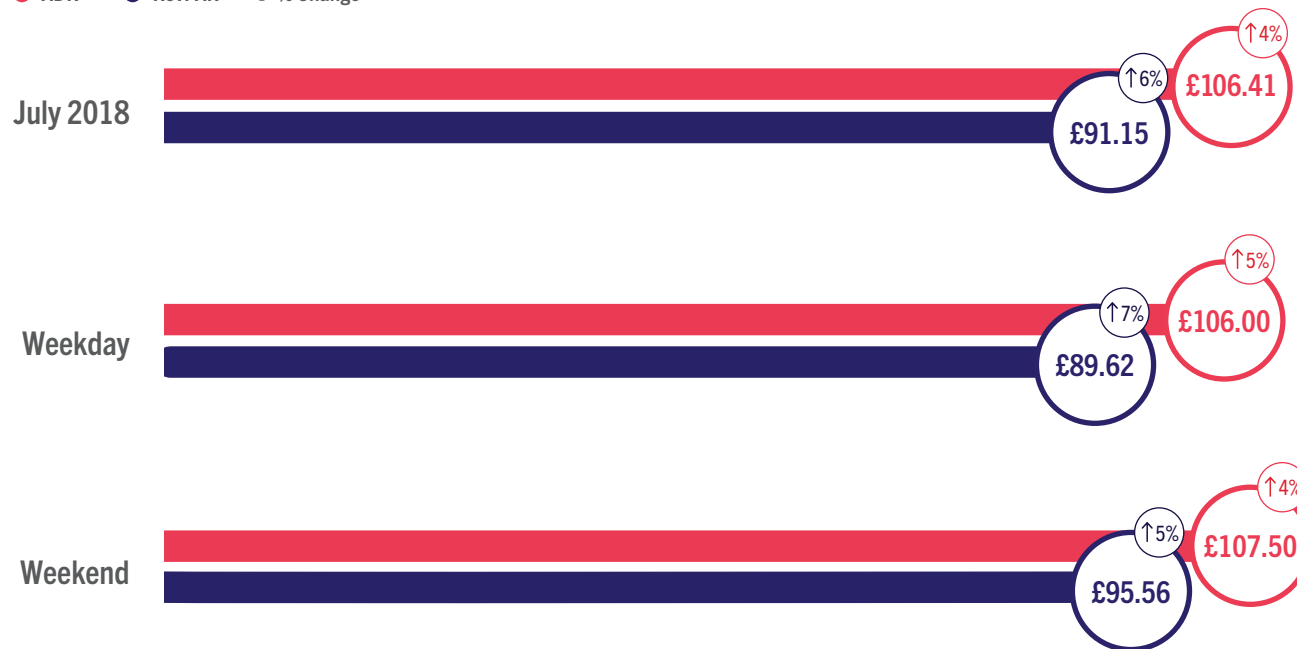
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - July 2018

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2016	2017	2018
July	£97.48	£101.85	£106.41
Weekday	£97.80	£101.04	£106.00
Weekend	£96.85	£103.73	£107.50

RevPAR

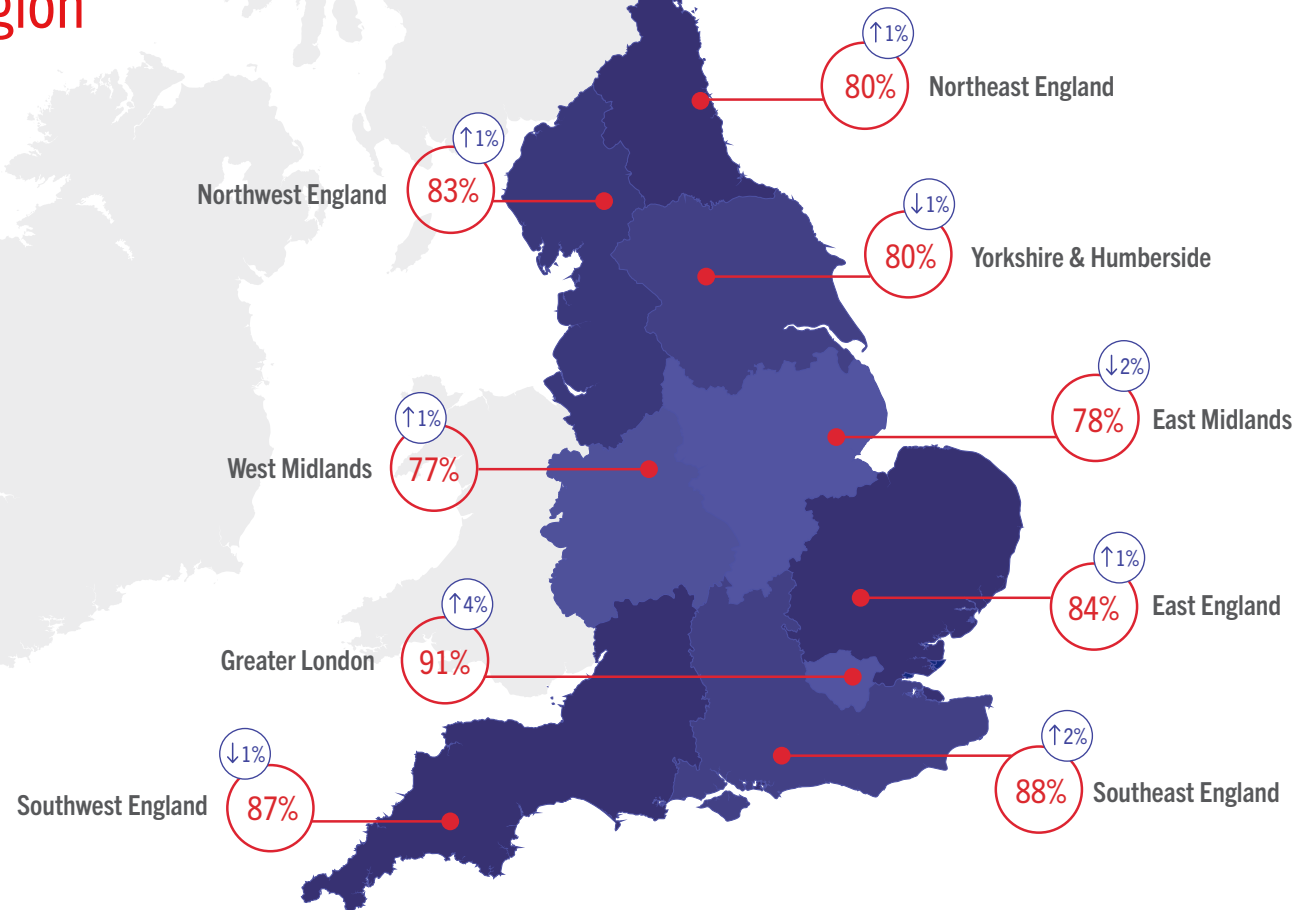
	2016	2017	2018
July	£82.24	£85.78	£91.15
Weekday	£80.94	£83.67	£89.62
Weekend	£84.96	£90.92	£95.56



Room Occupancy By Region

At a glance - July 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	85%	83%	84%
East Midlands	78%	79%	78%
Greater London	88%	88%	91%
Northeast England	80%	80%	80%
Northwest England	82%	82%	83%
Southeast England	86%	86%	88%
Southwest England	88%	87%	87%
West Midlands	74%	76%	77%
Yorkshire & Humberside	82%	81%	80%

Bedspace Occupancy	2016	2017	2018
East England	61%	59%	59%
East Midlands	56%	56%	55%
Greater London	65%	64%	66%
Northeast England	58%	57%	56%
Northwest England	60%	59%	59%
Southeast England	62%	61%	62%
Southwest England	63%	61%	60%
West Midlands	51%	52%	52%
Yorkshire & Humberside	60%	58%	57%

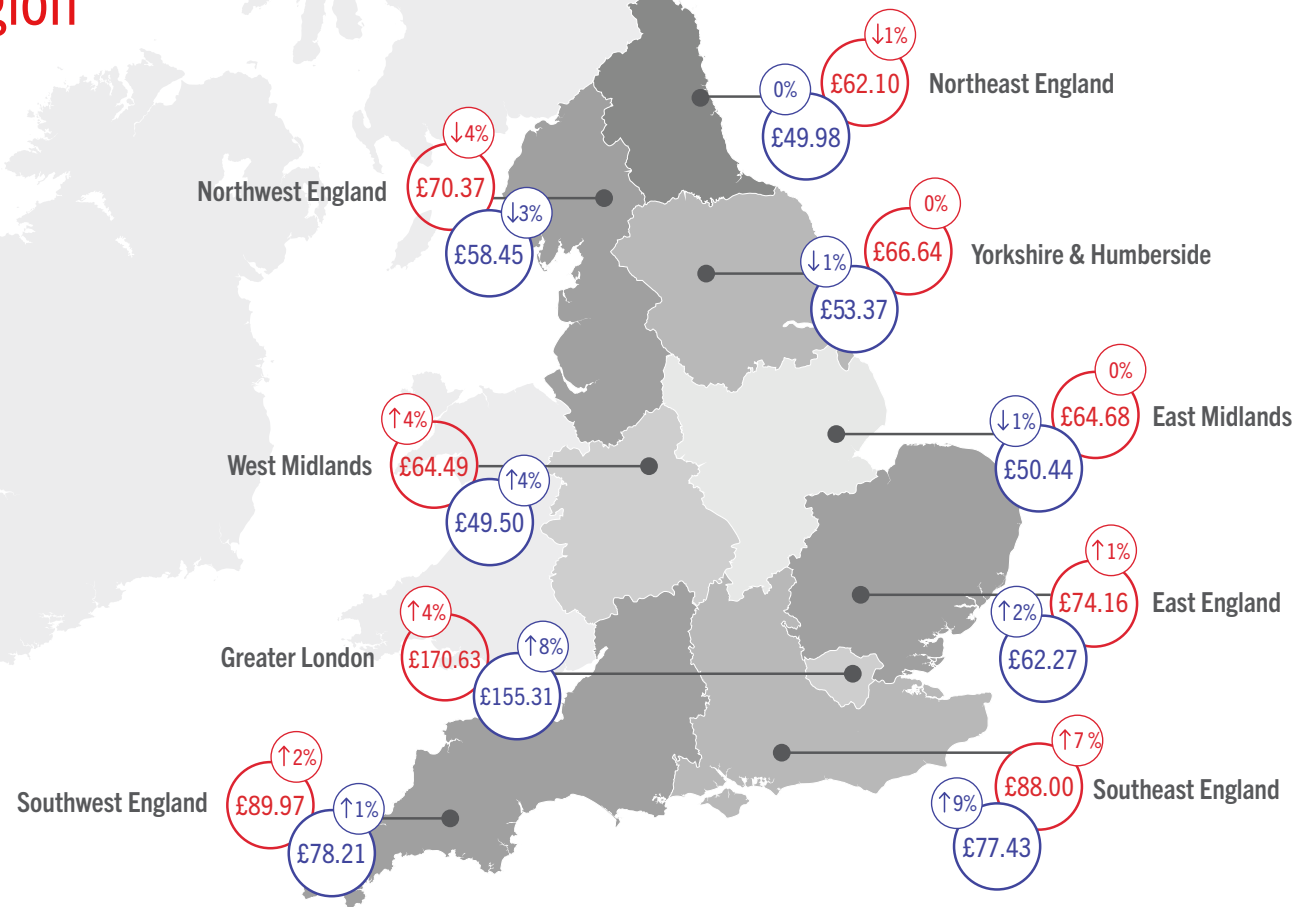


ADR and RevPAR By Region

At a glance - July 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	£69.86	£73.22	£74.16
East Midlands	£60.67	£64.38	£64.68
Greater London	£153.58	£163.57	£170.63
Northeast England	£62.82	£62.51	£62.10
Northwest England	£69.51	£73.40	£70.37
Southeast England	£82.57	£81.86	£88.00
Southwest England	£83.95	£88.38	£89.97
West Midlands	£60.77	£62.24	£64.49
Yorkshire & Humberside	£64.86	£66.62	£66.64

RevPAR	2016	2017	2018
East England	£59.41	£60.77	£62.27
East Midlands	£47.30	£51.04	£50.44
Greater London	£135.46	£143.15	£155.31
Northeast England	£50.38	£49.99	£49.98
Northwest England	£57.13	£60.22	£58.45
Southeast England	£71.17	£70.79	£77.43
Southwest England	£74.15	£77.31	£78.21
West Midlands	£44.90	£47.46	£49.50
Yorkshire & Humberside	£53.13	£54.15	£53.37



Room Occupancy By Destination Type

At a glance - July 2018



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2016	2017	2018
City / Large Town	84%	84%	86%
Small Town	81%	80%	82%
Countryside	80%	78%	77%
Seaside	88%	87%	88%

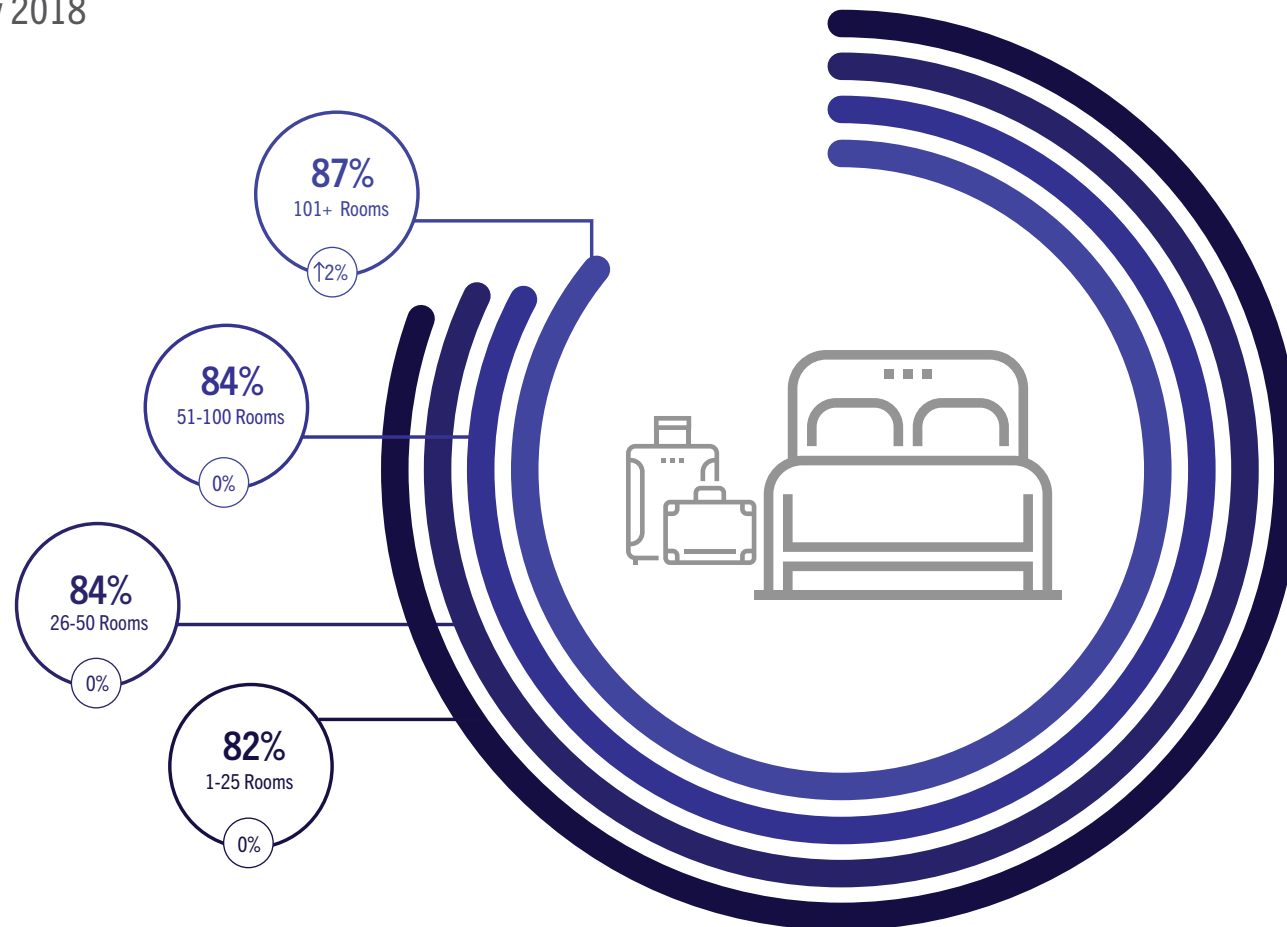
Bedspace Occupancy

	2016	2017	2018
City / Large Town	60%	59%	60%
Small Town	60%	59%	59%
Countryside	56%	54%	53%
Seaside	68%	66%	66%



Room Occupancy By Number of Rooms

At a glance - July 2018



Occupancy By Number of Rooms

Data Tables

Room Occupancy	2016	2017	2018
1-25 Rooms	84%	82%	82%
26-50 Rooms	84%	83%	84%
51-100 Rooms	84%	84%	84%
101+ Rooms	85%	85%	87%

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



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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