

England Occupancy Survey

April 2019 Results



Summary of Results

Room occupancy in April decreased by -1% to 76% whereas **bedspace occupancy**, at 56%, remained level compared to April 2018. In April 2019 there was an increase of +2.3% in room **supply** and an increase of +1.3% in **demand** when compared to the same month in 2018.

RevPar, which is the total room revenue divided by the total number of available rooms, decreased by -1% in April compared to the previous year at £70.05.

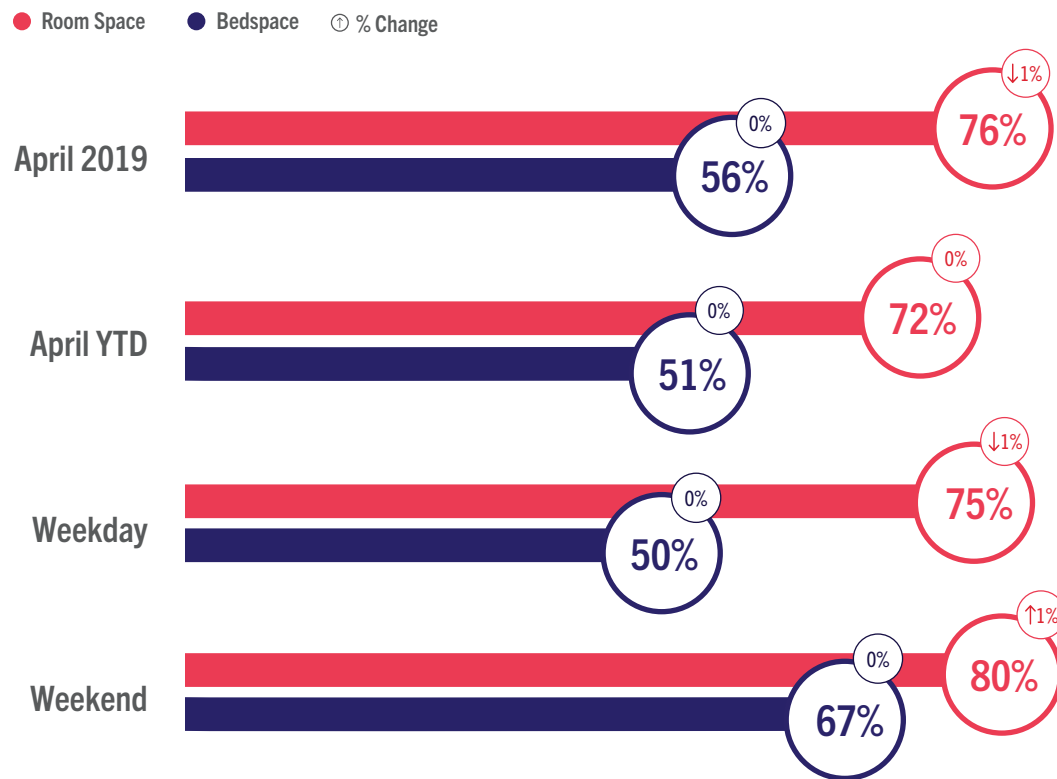
City/large town room occupancy fell by -1% to 77% whilst **bedspace occupancy** remained level at 55%. **Seaside** room occupancy increased +2% from 2018, to 79%, **bedspace occupancy** increased by +3% to 63%. **Small town** room occupancy remained unchanged at 73%, **bedspace occupancy** increased by +1%, to 54%. **Countryside** room occupancy remained unchanged at 67% and **bedspace occupancy** increased by +1%, to 48%.

Looking at occupancy rates by **establishment size**, establishments with 1 - 25 and those with 26 - 50 rooms showed greatest percentage increase in room occupancy, both increasing by +1% to 72% and 75% respectively compared to April 2018 and both increasing **bedspace occupancy** by +1% to 54% and 55%. Establishments with 51 - 100 rooms maintained a similar level of occupancy compared to the same period 2018 at 75%, whilst increasing in **bedspace occupancy** by +1%, to 57%. Establishments with over 101 rooms saw a decline of -1% in room occupancy to 77%, whilst showing no change in **bed space occupancy** at 56%.

Looking at occupancy rates by **region**, the biggest increase came from Yorkshire & Humberside, increasing room occupancy by +2% to 75%, with a +2% increase in **bedspace occupancy**. Room occupancy remained level for North East England, East England, Southeast England and the Southwest of England. All other regions decreased in room occupancy in April 2019, ranging from a -1% to -3% fall compared to April 2018.

England Room and Bedspace Occupancy

At a glance - April 2019



*As of February 2019 occupancy percentage changes are given in absolute terms – see methodology statement (page 16).

England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2017	2018	2019
April	78%	77%	76%
April YTD	72%	72%	72%
Weekday	76%	76%	75%
Weekend	82%	80%	80%

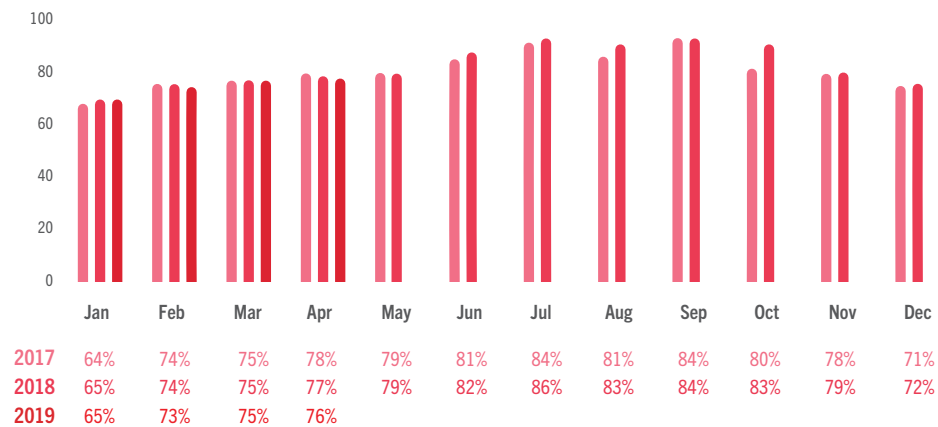
Bedspace Occupancy	2017	2018	2019
April	58%	55%	56%
April YTD	51%	51%	51%
Weekday	51%	50%	50%
Weekend	68%	67%	67%

	2017	2018	2019
Room supply	1.6%	1.5%	2.3%
Room demand	1.9%	0.7%	1.3%

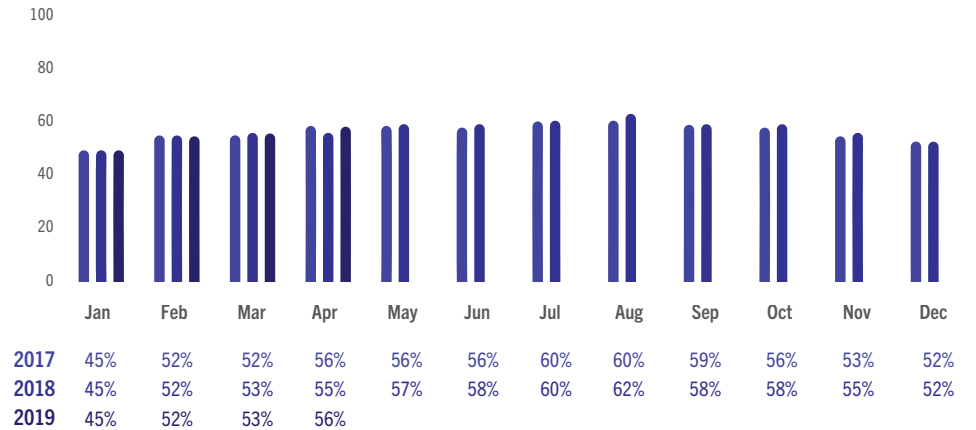
Table to the left shows the room supply and room demand year on year relative percentage change.

England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - April 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
April	£91.65	£92.13	£91.96
Weekday	£90.99	£92.22	£91.92
Weekend	£93.07	£91.87	£92.05

RevPAR

	2017	2018	2019
April	£71.15	£70.93	£70.05
Weekday	£68.78	£70.10	£68.62
Weekend	£76.69	£73.21	£74.00

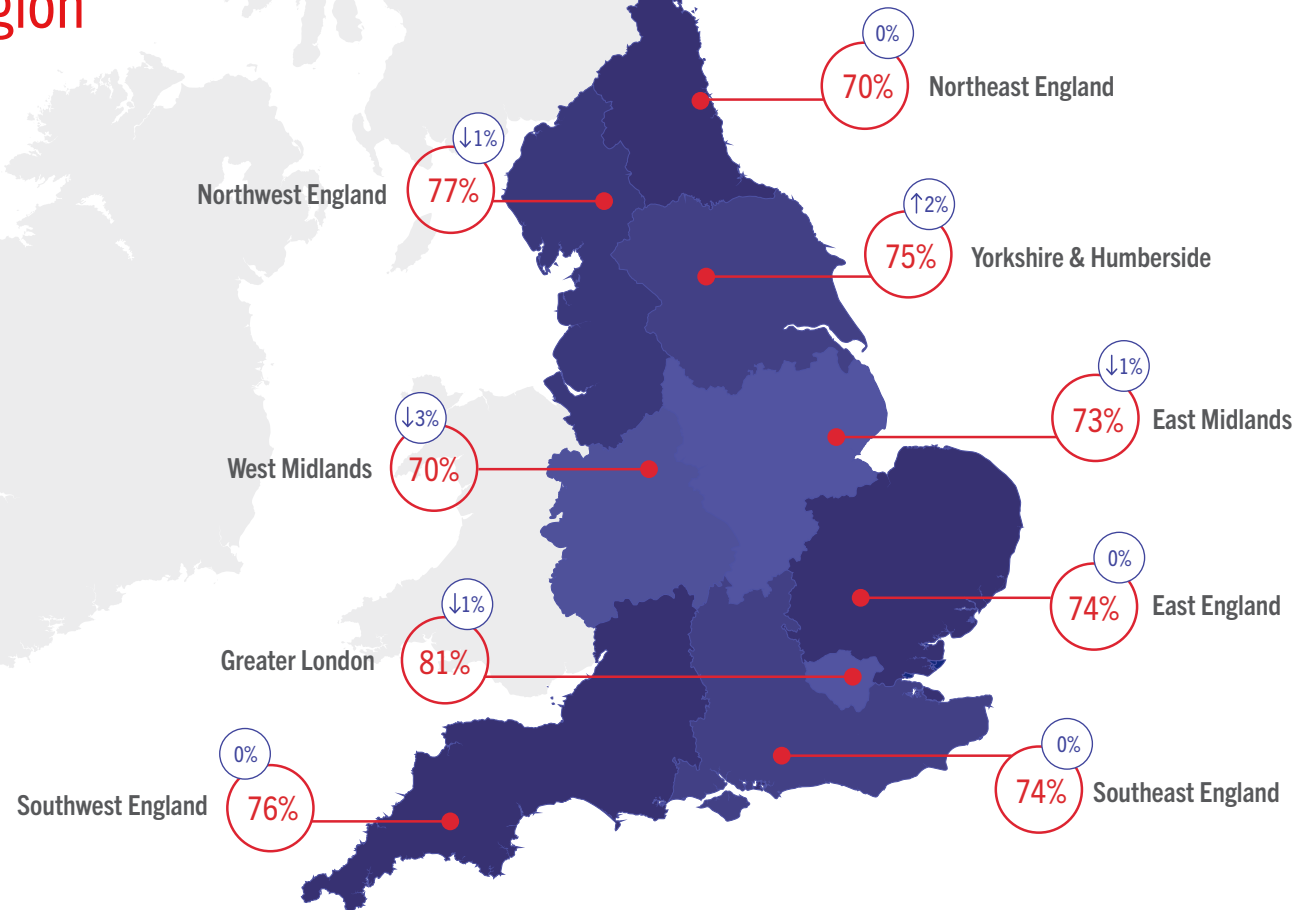


Room Occupancy By Region

At a glance - April 2019

*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.

**As of February 2019 occupancy percentage changes are given in absolute terms – see methodology statement (page 16).



Occupancy By Region

Data Tables

Room Occupancy	2017	2018	2019
East England	74%	74%	74%
East Midlands	73%	74%	73%
Greater London	83%	82%	81%
Northeast England	72%	70%	70%
Northwest England	78%	78%	77%
Southeast England	76%	75%	74%
Southwest England	78%	77%	76%
West Midlands	72%	73%	70%
Yorkshire & Humberside	75%	73%	75%

Bedspace Occupancy	2017	2018	2019
East England	55%	53%	54%
East Midlands	56%	53%	54%
Greater London	63%	61%	60%
Northeast England	54%	50%	50%
Northwest England	59%	56%	57%
Southeast England	57%	54%	54%
Southwest England	58%	54%	55%
West Midlands	51%	50%	49%
Yorkshire & Humberside	57%	53%	55%

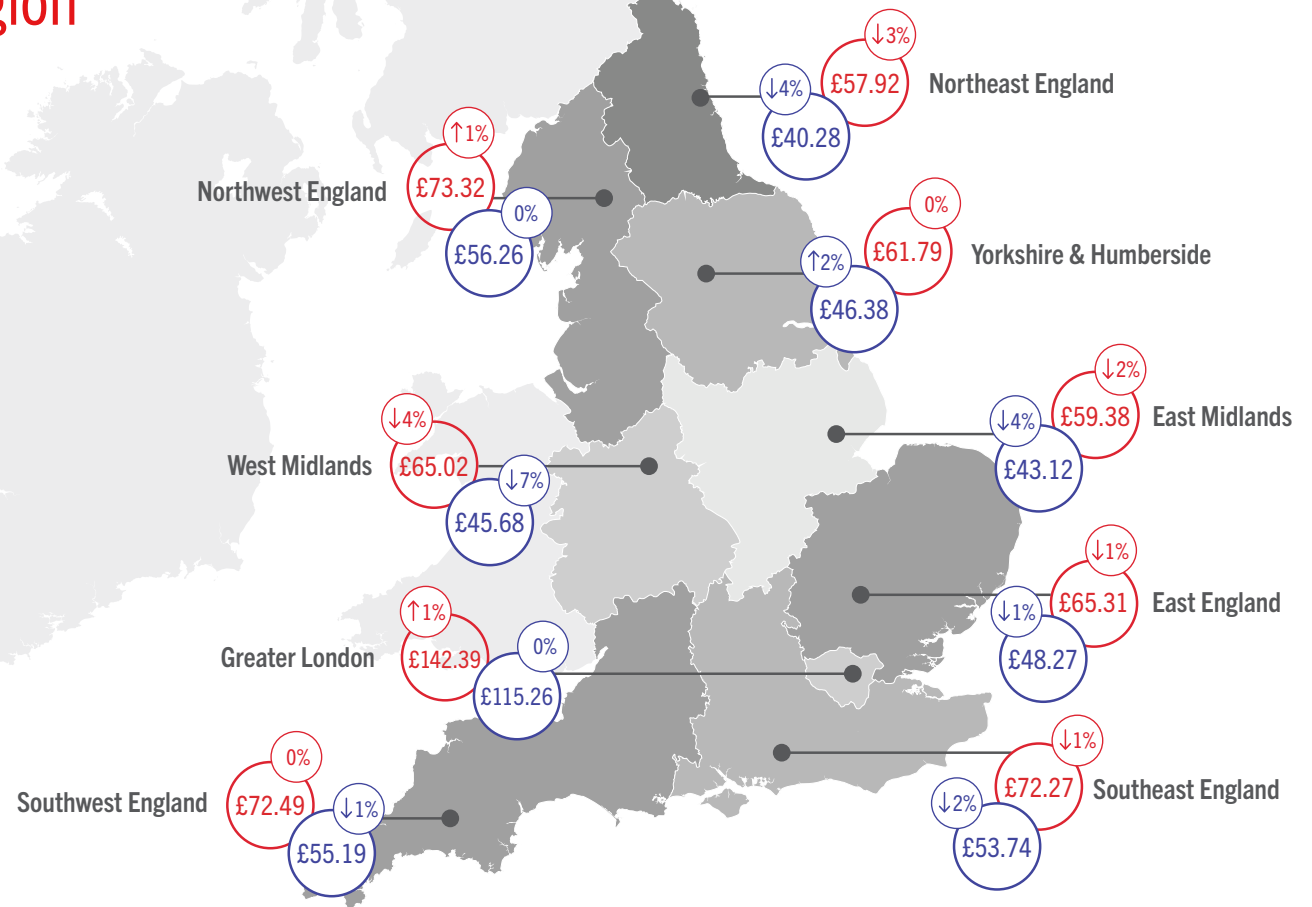


ADR and RevPAR By Region

At a glance - April 2019

*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	2017	2018	2019
East England	£65.36	£65.84	£65.31
East Midlands	£59.89	£60.70	£59.38
Greater London	£142.04	£140.66	£142.39
Northeast England	£60.37	£59.85	£57.92
Northwest England	£72.42	£72.70	£73.32
Southeast England	£72.75	£73.30	£72.27
Southwest England	£72.75	£72.52	£72.49
West Midlands	£65.12	£67.60	£65.02
Yorkshire & Humberside	£63.21	£61.96	£61.79

RevPAR	2017	2018	2019
East England	£48.50	£48.52	£48.27
East Midlands	£43.91	£44.91	£43.12
Greater London	£117.89	£115.83	£115.26
Northeast England	£43.53	£41.75	£40.28
Northwest England	£56.47	£56.35	£56.26
Southeast England	£55.39	£54.82	£53.74
Southwest England	£56.76	£55.50	£55.19
West Midlands	£46.57	£49.28	£45.68
Yorkshire & Humberside	£47.66	£45.43	£46.38



Room Occupancy By Destination Type

At a glance - April 2019



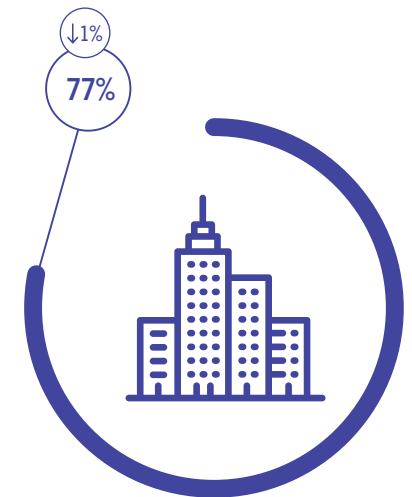
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	78%	78%	77%
Small Town	73%	72%	73%
Countryside	68%	67%	67%
Seaside	80%	77%	79%

Bedspace Occupancy

	2017	2018	2019
City / Large Town	58%	55%	55%
Small Town	55%	53%	54%
Countryside	49%	47%	48%
Seaside	65%	60%	63%



Room Occupancy By Number of Rooms

At a glance - April 2019



1-25 Rooms



26-50 Rooms



51-100 Rooms



101+ Rooms

Occupancy By Number of Rooms

Data Tables

Room Occupancy	2017	2018	2019
1-25 Rooms	75%	72%	72%
26-50 Rooms	75%	74%	75%
51-100 Rooms	76%	76%	75%
101+ Rooms	78%	78%	77%

Bedspace Occupancy	2017	2018	2019
1-25 Rooms	57%	53%	54%
26-50 Rooms	57%	54%	55%
51-100 Rooms	59%	56%	57%
101+ Rooms	58%	56%	56%



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. All units given throughout this report represent a positive number, unless stated otherwise.

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.

As of February 2019 a change in reporting style was made to refer to percentage changes of occupancy data in absolute terms. All previous reports prior to February 2019 show percentage changes of occupancy data in relative terms. ADR, RevPAR, Supply & Demand percentage changes continue to be shown in relative terms.



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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