

England Occupancy Survey

August 2019 Results



Summary of Results

Room occupancy remained level in August at 82%, bedspace occupancy also remained level compared to July 2018 at 63%. In July 2019, there was an increase of +2.3% in room **supply** and an increase of +1.9% 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, increased by +2% in August compared to the previous year at £79.13.

Seaside room occupancy increased by +1% to 89% and bedspace occupancy increased by +1% to 75%. Room occupancy across all other destination types remained level compared to the same period 2018. Room occupancy remained level for **city/large town** accommodation at 82%, while bedspace occupancy increased +1% to 62%. **Countryside** and **small town** destination accommodations both remained at 79% room occupancy. **Countryside** Bedspace room occupancy increased +1% to 59%, whilst **small town** bedspace occupancy remained level at 61%.

Looking at occupancy by **establishment size**, establishments with 1-25 rooms saw the greatest increase in room occupancy, up +2% at 81%, while bedspace increased +2% to 64%. Room occupancy

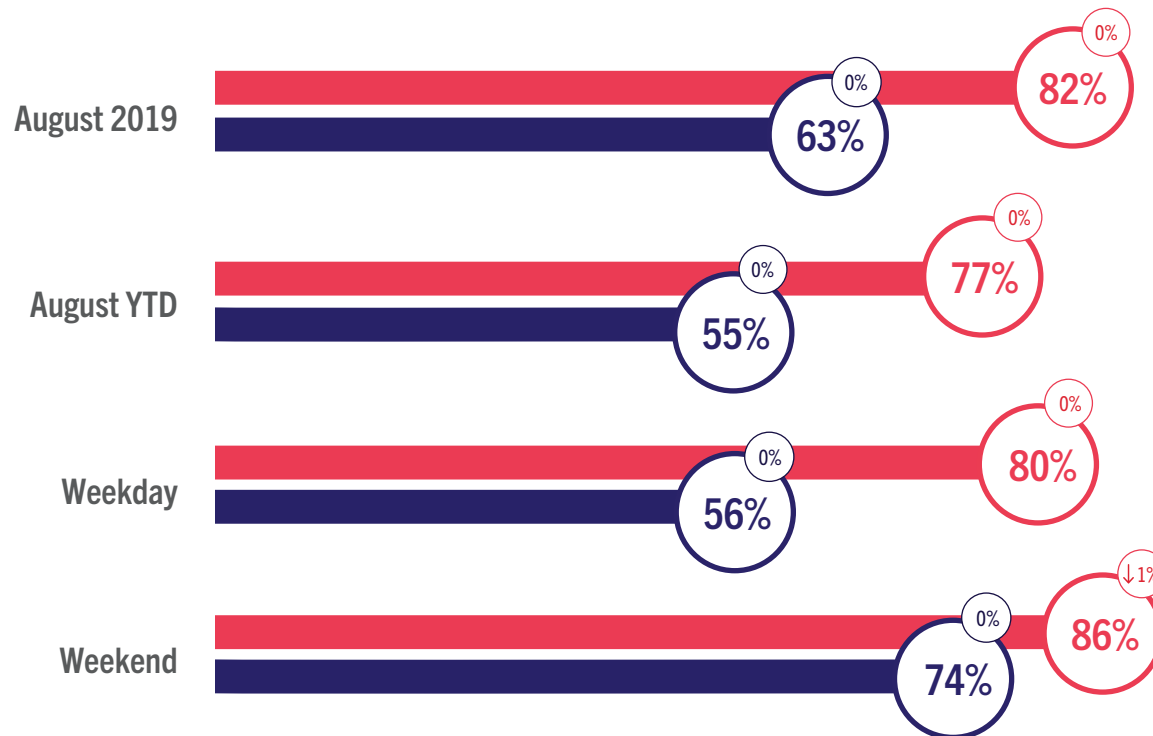
for establishments sizes with 26-50 rooms & 51-100 rooms both remained level compared to the same period 2018 at 82%, bedspace occupancy increased +1% in 26-50 size rooms to 63%, bedside occupancy in 51-100 sized rooms increased by +1% to 64%. Establishments with over 101+ rooms saw a -1% decline in room occupancy to 82%, bedspace occupancy remained level at 62%.

Looking at room occupancy by **region**, the greatest increase was seen in Yorkshire and Humberside, up 2% to 81%, while also increasing +2% in bed space occupancy to 61%. The North East increased +1% to 78%, also increasing +1% in bedspace occupancy to 62%. Room occupancy remained level across the South West at 87%, Greater London at 87% and the West Midland at 76%. Bedspace occupancy increased 1% in the Southwest to 65%, remained level across Greater London at 67% and the West Midland at 54%. Room Occupancy declined across all other regions compared to the same period 2018 between -1% to -3%.

England Room and Bedspace Occupancy

At a glance - August 2019

● Room Space ● Bedspace ⓘ % Change



*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
August	81%	83%	82%
August YTD	77%	77%	77%
Weekday	79%	81%	80%
Weekend	86%	87%	86%

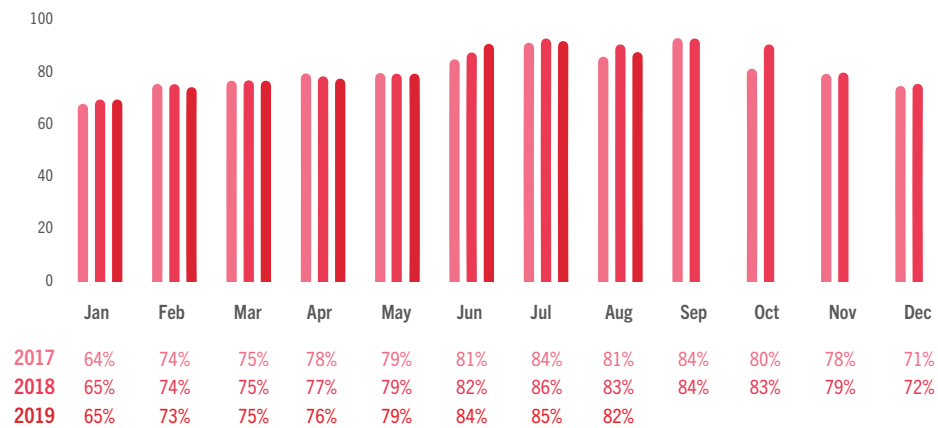
Bedspace Occupancy	2017	2018	2019
August	60%	62%	63%
August YTD	55%	55%	55%
Weekday	55%	57%	56%
Weekend	72%	74%	74%

	2017	2018	2019
Room supply	2.2%	1.3%	2.3%
Room demand	1.4%	3.7%	1.9%

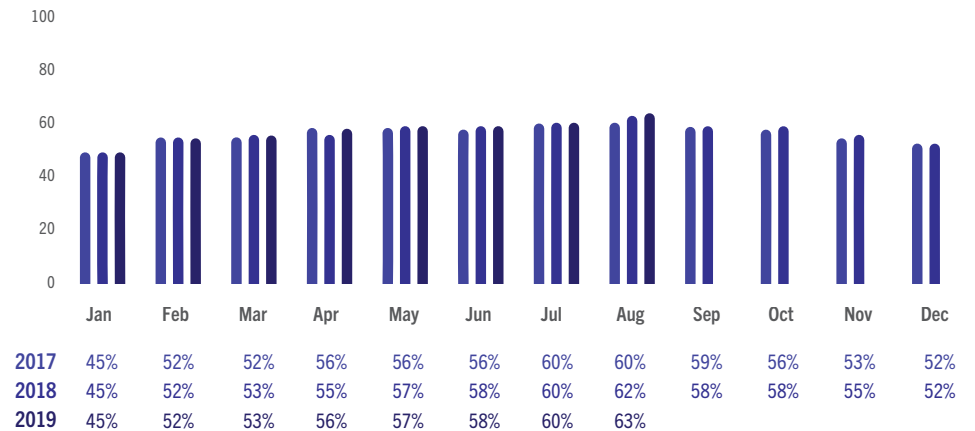
Table to the left shows the room supply and room demand year on year relative percentage change.

England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



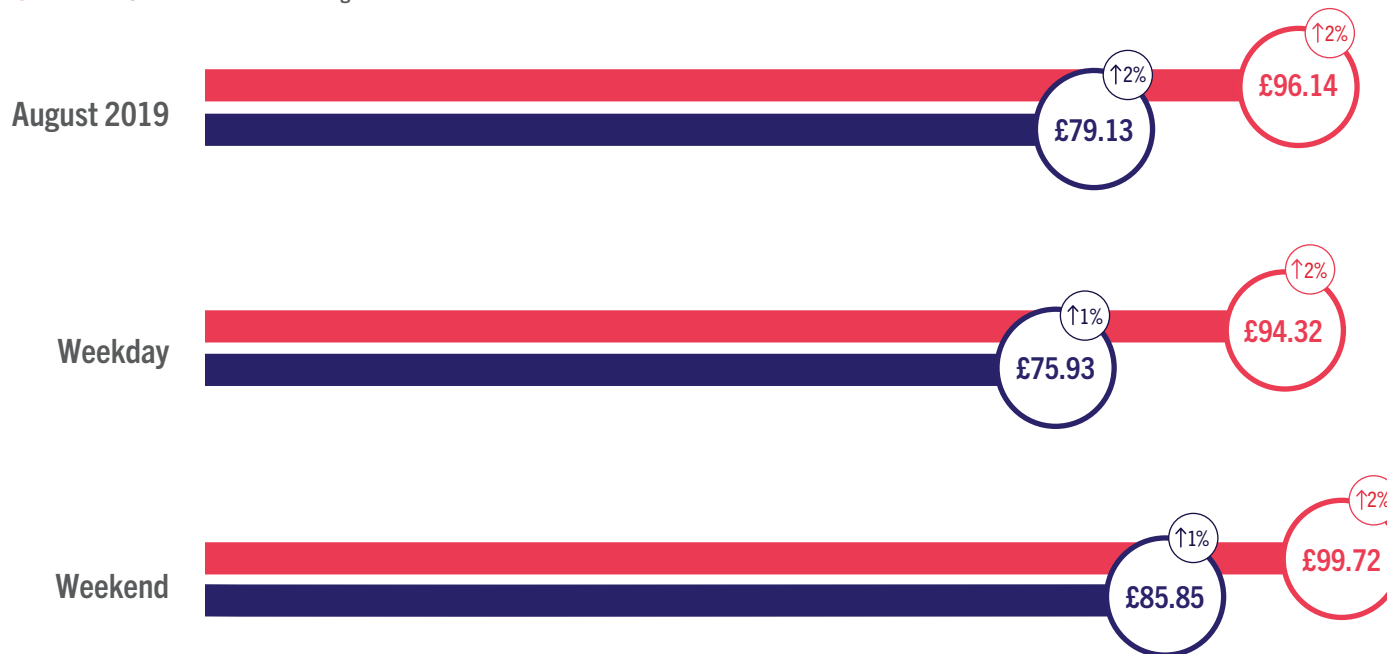
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - August 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
August	£91.68	£94.20	£96.14
Weekday	£90.28	£92.77	£94.32
Weekend	£95.33	£97.46	£99.72

RevPAR

	2017	2018	2019
August	£74.01	£77.81	£79.13
Weekday	£71.08	£74.97	£75.93
Weekend	£82.43	£84.75	£85.85

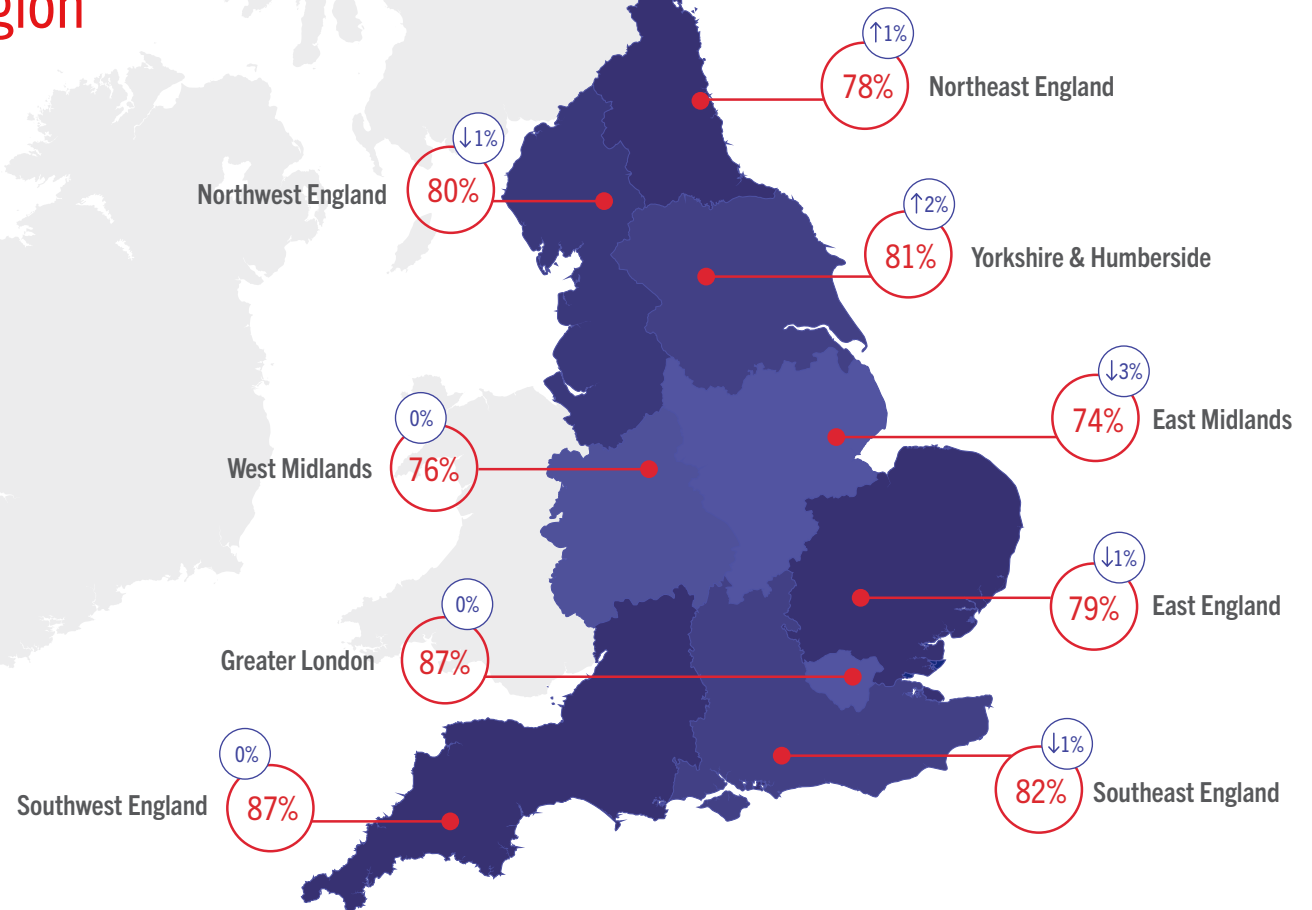


Room Occupancy By Region

At a glance - August 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	80%	80%	79%
East Midlands	75%	77%	74%
Greater London	82%	87%	87%
Northeast England	77%	77%	78%
Northwest England	80%	82%	80%
Southeast England	83%	83%	82%
Southwest England	87%	87%	87%
West Midlands	75%	75%	76%
Yorkshire & Humberside	79%	79%	81%

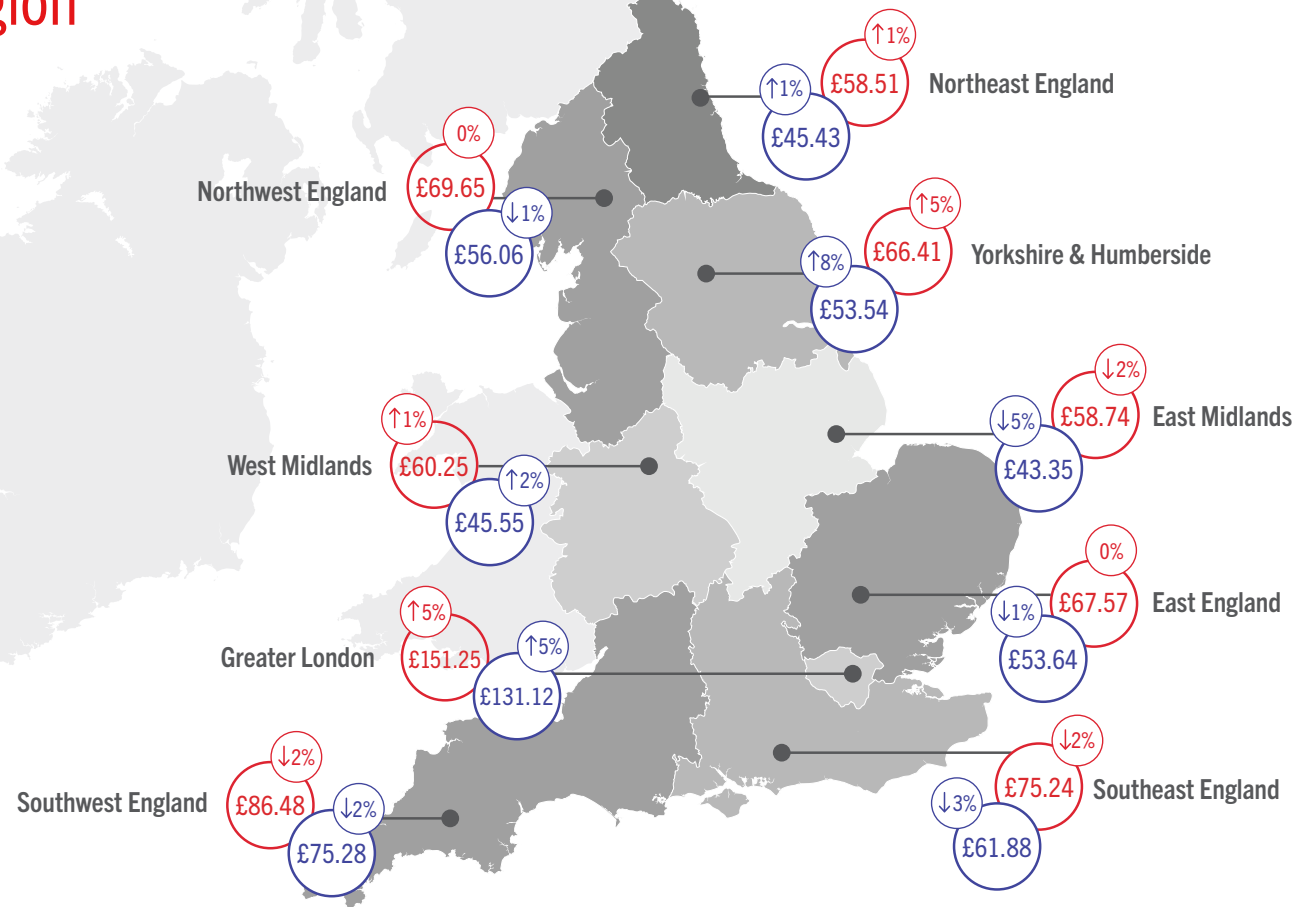
Bedspace Occupancy	2017	2018	2019
East England	59%	60%	60%
East Midlands	57%	59%	57%
Greater London	63%	67%	67%
Northeast England	57%	57%	58%
Northwest England	61%	63%	62%
Southeast England	61%	62%	62%
Southwest England	63%	64%	65%
West Midlands	53%	54%	54%
Yorkshire & Humberside	59%	59%	61%

ADR and RevPAR By Region

At a glance - August 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

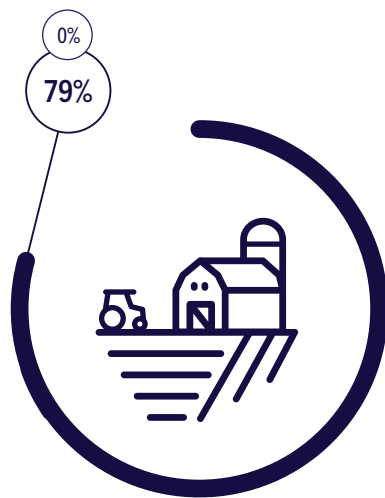
Data Tables

ADR	2017	2018	2019
East England	£68.07	£67.68	£67.57
East Midlands	£58.40	£59.69	£58.74
Greater London	£141.30	£144.10	£151.25
Northeast England	£59.94	£58.14	£58.51
Northwest England	£68.75	£69.62	£69.65
Southeast England	£76.09	£77.00	£75.24
Southwest England	£87.11	£88.35	£86.48
West Midlands	£58.84	£59.46	£60.25
Yorkshire & Humberside	£64.02	£63.00	£66.41

RevPAR	2017	2018	2019
East England	£54.12	£54.17	£53.64
East Midlands	£43.74	£45.84	£43.35
Greater London	£116.07	£125.05	£131.12
Northeast England	£46.11	£44.77	£45.43
Northwest England	£54.75	£56.88	£56.06
Southeast England	£62.91	£63.77	£61.88
Southwest England	£75.47	£76.49	£75.28
West Midlands	£44.41	£44.86	£45.55
Yorkshire & Humberside	£50.36	£49.60	£53.54

Room Occupancy By Destination Type

At a glance - August 2019



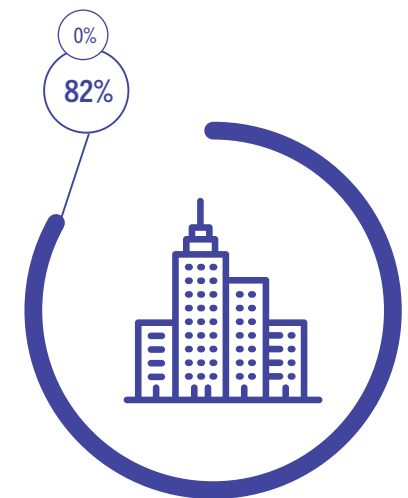
Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	80%	83%	82%
Small Town	79%	79%	79%
Countryside	76%	79%	79%
Seaside	89%	89%	89%

Bedspace Occupancy

	2017	2018	2019
City / Large Town	59%	61%	62%
Small Town	60%	61%	61%
Countryside	56%	58%	59%
Seaside	74%	74%	75%



Room Occupancy By Number of Rooms

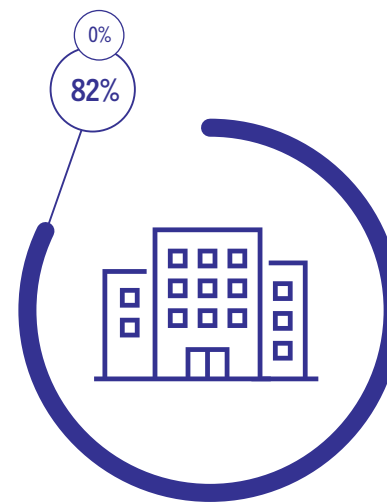
At a glance - August 2019



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	79%	79%	81%
26-50 Rooms	82%	82%	82%
51-100 Rooms	82%	82%	82%
101+ Rooms	80%	83%	82%

Bedspace Occupancy	2017	2018	2019
1-25 Rooms	61%	62%	64%
26-50 Rooms	61%	62%	63%
51-100 Rooms	63%	63%	64%
101+ Rooms	60%	62%	62%



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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