

England Occupancy Survey

September 2019 Results



Summary of Results

Room occupancy remained level in September at 83%, bedspace occupancy declined -1% compared to September 2018 at 57%. In July 2019, there was an increase of +2.2% in room supply and an increase of +1.8% 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 +3% in September compared to the previous year at £87.02.

Looking at **destination type**, Seaside room occupancy increased by +2% to 85% and bedspace occupancy increased by +1% to 61% in September 2019. Countryside establishments saw an increase of +2% in room occupancy and remained level in bedspace occupancy at 52%. Room occupancy remained level for small town establishments at 81%, bedspace occupancy also remained level at 57%. City/large town establishments saw a decline in room space occupancy of -1% to 84%, while bedspace occupancy saw a decline of -1%.

Looking at occupancy by **establishment size**, establishments with 1-25 rooms saw the greatest increase in room occupancy, up +3% at

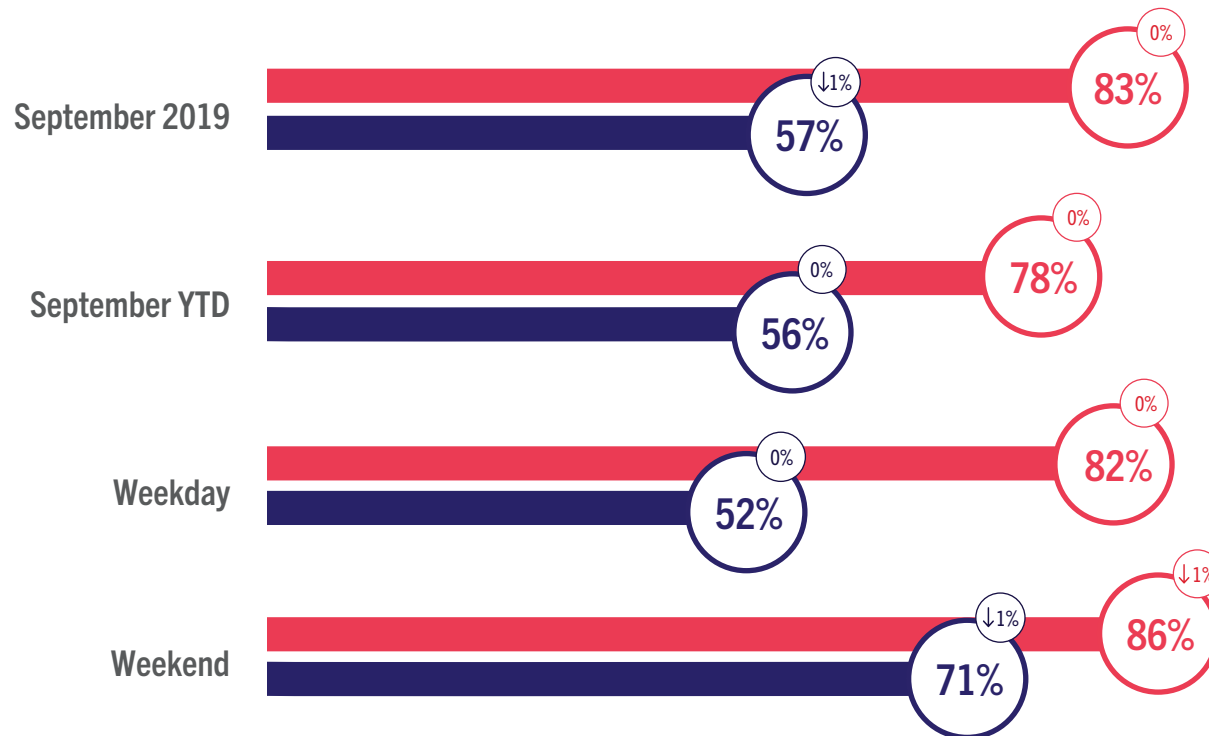
82%, while bedspace increased +1% to 58%. Room occupancy for establishment sizes with 26-50 rooms & 101+ rooms both remained level compared to the same period 2018 at 82% and 84% respectively, Establishments of 26-50 rooms declined -1% in bedspace occupancy to 57%, establishments of 101+ rooms also declined -1% to 57%. Establishment sizes 51-100 rooms saw a decline of -1% in room space occupancy to 82% and declined -1% in bedspace to 59%.

Looking at room **occupancy by region**, Yorkshire and Humberside saw an increase of +1% in room space occupancy to 82% and remained at level room space occupancy at 57%. Room space either remained level or declined across all other regions. Room occupancy remained level through Greater London at 87%, South West of England at 85%, South East of England at 83%, and East of England at 81%. Room space declined by -1% in the North East at 80% and North West England at 81%. Both the East Midland and West Midlands saw declines of -2% to 79% room occupancy.

England Room and Bedspace Occupancy

At a glance - September 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
September	84%	84%	83%
September YTD	78%	78%	78%
Weekday	84%	82%	82%
Weekend	85%	86%	86%

Bedspace Occupancy	2017	2018	2019
September	59%	58%	57%
September YTD	55%	56%	56%
Weekday	52%	52%	52%
Weekend	73%	72%	71%

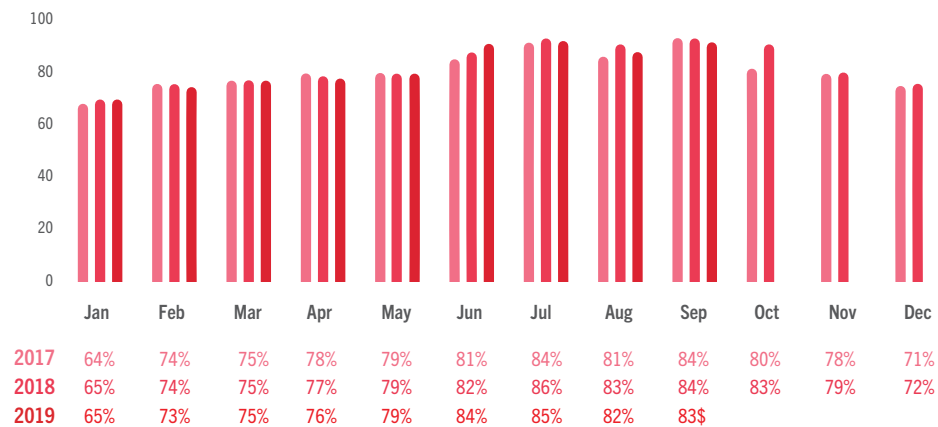
	2017	2018	2019
Room supply	2.0%	1.6%	2.2%
Room demand	1.1%	1.2%	1.8%

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

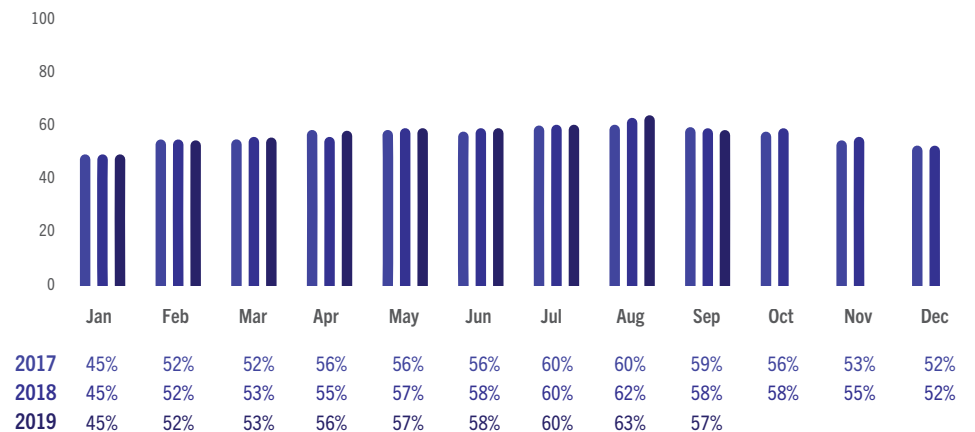


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



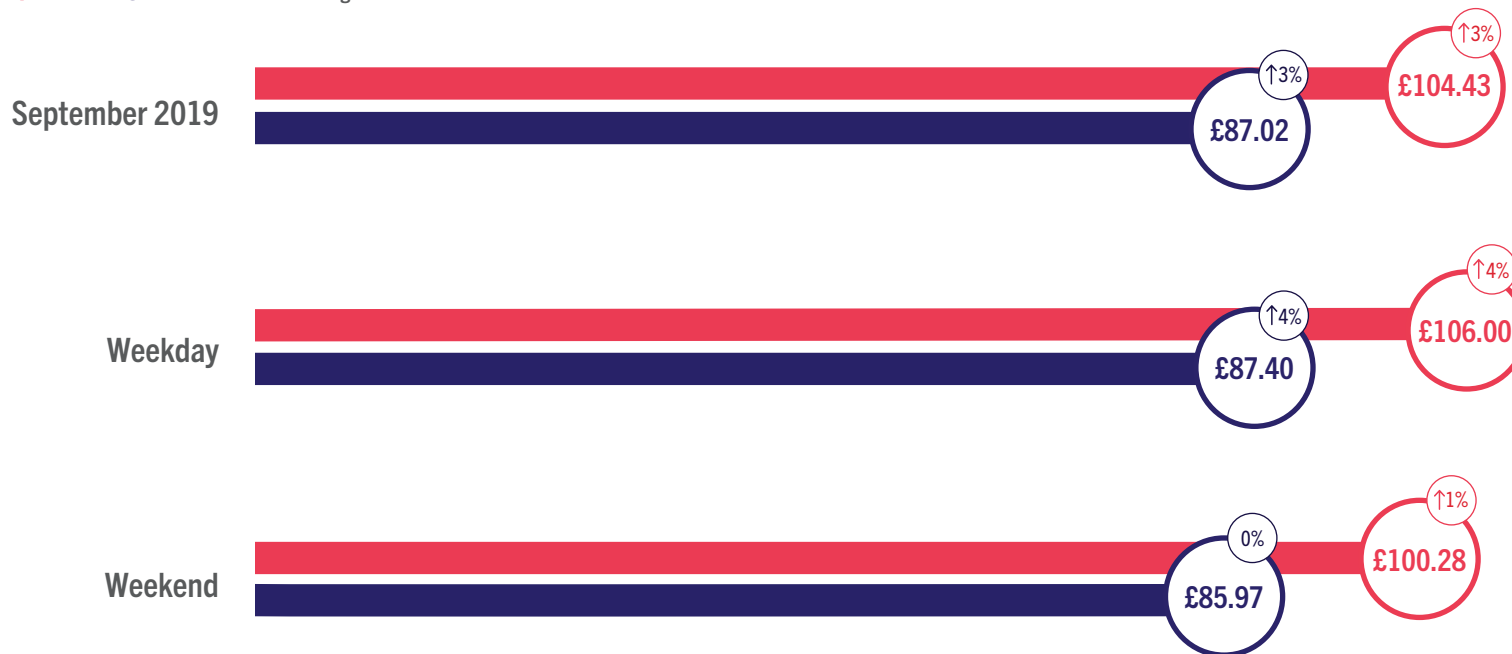
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - September 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
September	£101.76	£101.32	£104.43
Weekday	£103.74	£102.30	£106.00
Weekend	£97.86	£99.16	£100.28

RevPAR

	2017	2018	2019
September	£85.46	£84.73	£87.02
Weekday	£86.71	£84.35	£87.40
Weekend	£82.96	£85.62	£85.97

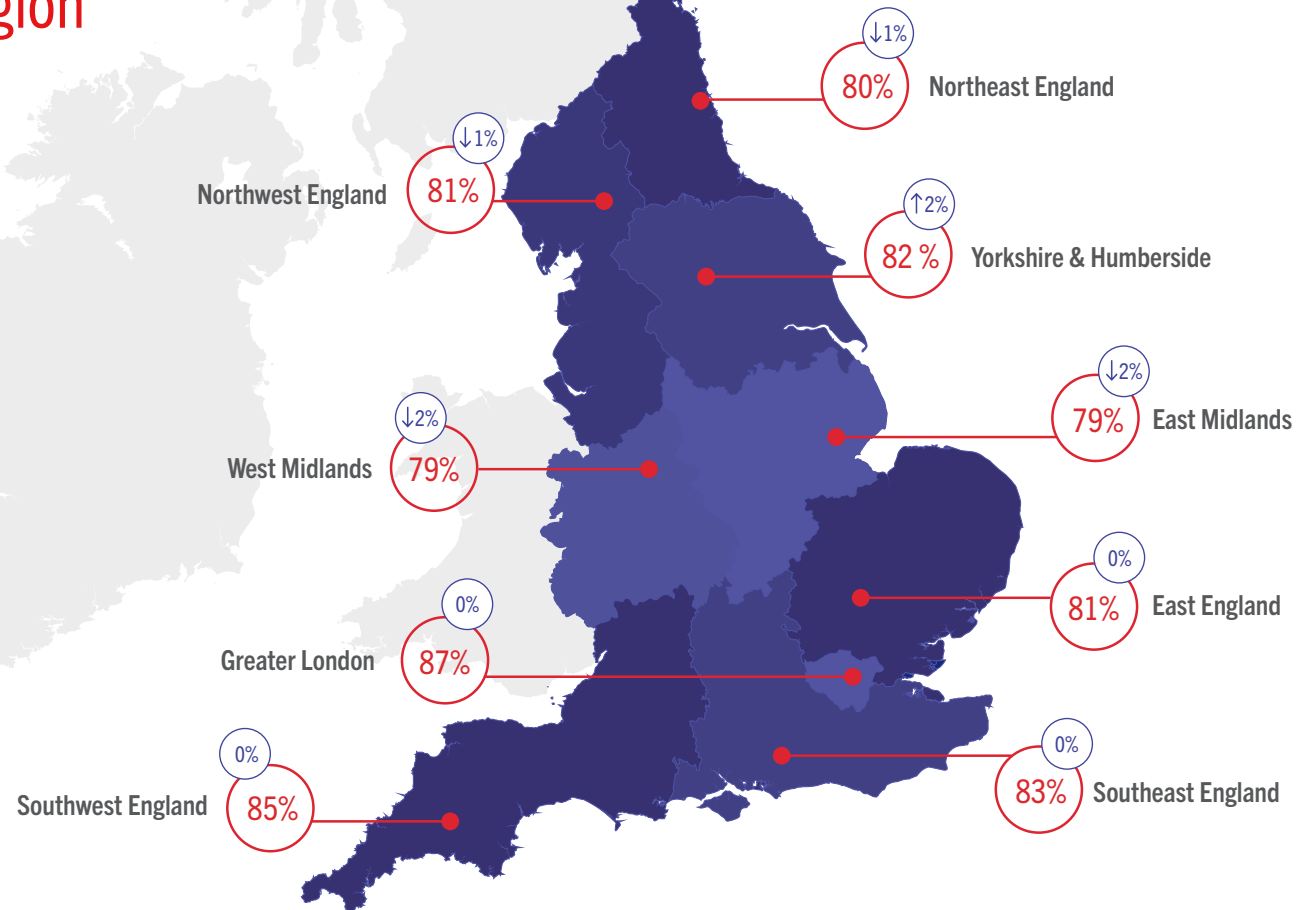


Room Occupancy By Region

At a glance - September 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	82%	81%	81%
East Midlands	81%	81%	79%
Greater London	87%	87%	87%
Northeast England	83%	82%	80%
Northwest England	81%	82%	81%
Southeast England	84%	83%	83%
Southwest England	86%	85%	85%
West Midlands	81%	82%	79%
Yorkshire & Humberside	81%	80%	82%

Bedspace Occupancy	2017	2018	2019
East England	58%	57%	56%
East Midlands	57%	56%	53%
Greater London	62%	62%	61%
Northeast England	58%	57%	55%
Northwest England	57%	57%	56%
Southeast England	59%	57%	56%
Southwest England	60%	59%	58%
West Midlands	55%	55%	52%
Yorkshire & Humberside	58%	57%	57%

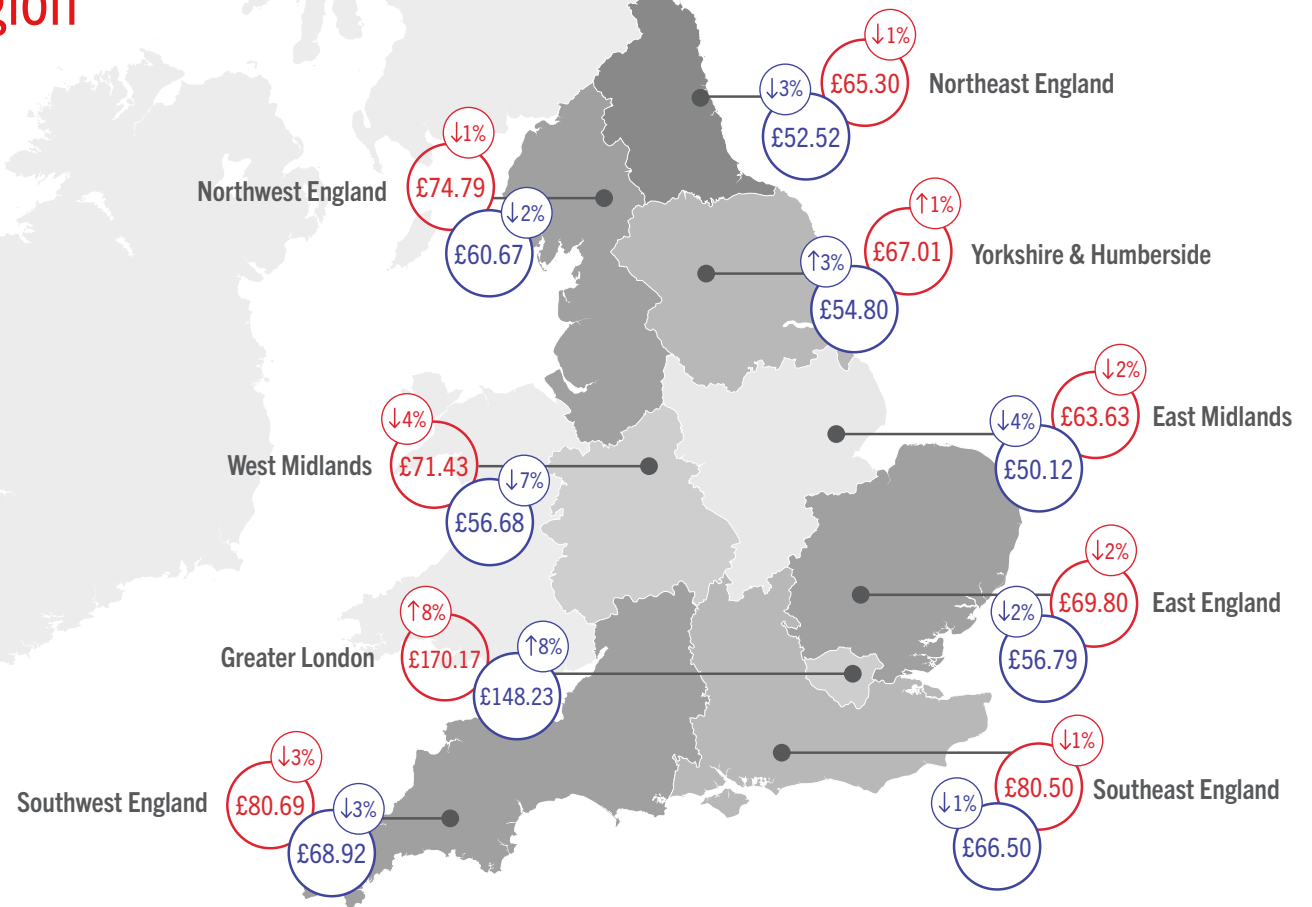


ADR and RevPAR By Region

At a glance - September 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

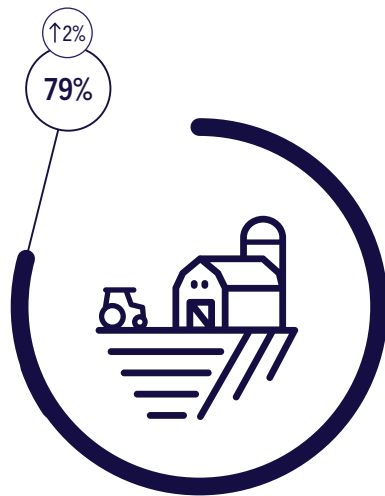
ADR	2017	2018	2019
East England	£71.06	£71.28	£69.80
East Midlands	£63.49	£64.74	£63.63
Greater London	£162.78	£157.51	£170.17
Northeast England	£66.25	£66.01	£65.30
Northwest England	£74.38	£75.21	£74.79
Southeast England	£81.65	£81.64	£80.50
Southwest England	£82.67	£83.33	£80.69
West Midlands	£71.04	£74.58	£71.43
Yorkshire & Humberside	£66.43	£66.41	£67.01

RevPAR	2017	2018	2019
East England	£58.18	£58.01	£56.79
East Midlands	£51.45	£52.31	£50.12
Greater London	£141.35	£137.08	£148.23
Northeast England	£54.67	£53.87	£52.52
Northwest England	£60.46	£61.79	£60.67
Southeast England	£68.98	£67.42	£66.50
Southwest England	£71.45	£70.80	£68.92
West Midlands	£57.74	£60.90	£56.68
Yorkshire & Humberside	£53.59	£53.19	£54.80



Room Occupancy By Destination Type

At a glance - September 2019



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	84%	84%	84%
Small Town	81%	80%	81%
Countryside	77%	77%	79%
Seaside	84%	83%	85%

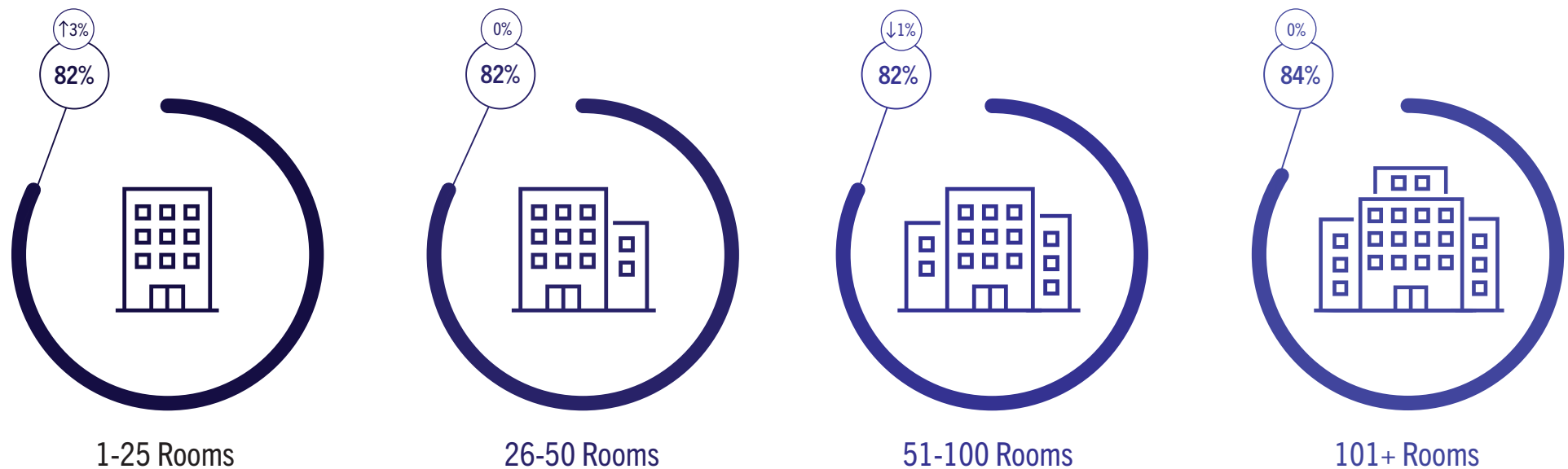
Bedspace Occupancy

	2017	2018	2019
City / Large Town	59%	58%	57%
Small Town	59%	57%	57%
Countryside	52%	52%	52%
Seaside	62%	60%	61%



Room Occupancy By Number of Rooms

At a glance - September 2019



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

Occupancy By Number of Rooms

Data Tables

Room Occupancy	2017	2018	2019
1-25 Rooms	81%	79%	82%
26-50 Rooms	83%	81%	82%
51-100 Rooms	83%	82%	82%
101+ Rooms	85%	84%	84%

Bedspace Occupancy	2017	2018	2019
1-25 Rooms	58%	57%	58%
26-50 Rooms	59%	58%	57%
51-100 Rooms	61%	60%	59%
101+ Rooms	59%	58%	57%



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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