

England Occupancy Survey

December 2019 Results



Summary of Results

Room occupancy declined -1% in December 2019 to 71%, bedspace occupancy also decreased -1% compared to December 2018 at 51%. There was an increase of +1.9% in room supply and an increase of +0.5% 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 December compared to the previous year at £69.24.

Looking at **destination type**, all location types saw a decline in roomspace occupancy in December 2019. Both declining -1% in roomspace occupancy, City/Large town accommodation at 73%, saw a decline of -1% in bedspace occupancy, Small town accommodation at 64%, remained level in bedspace occupancy at 47%. All other location types declined -2% in roomspace occupancy, Seaside location types at 64% declined -2% in bedspace occupancy to 49% & Countryside location types at 56% declined -2% in bedspace to 39%.

Looking at occupancy by **establishment size**, establishments with 1-25 rooms saw an increase in roomspace occupancy of +2% to 68%,

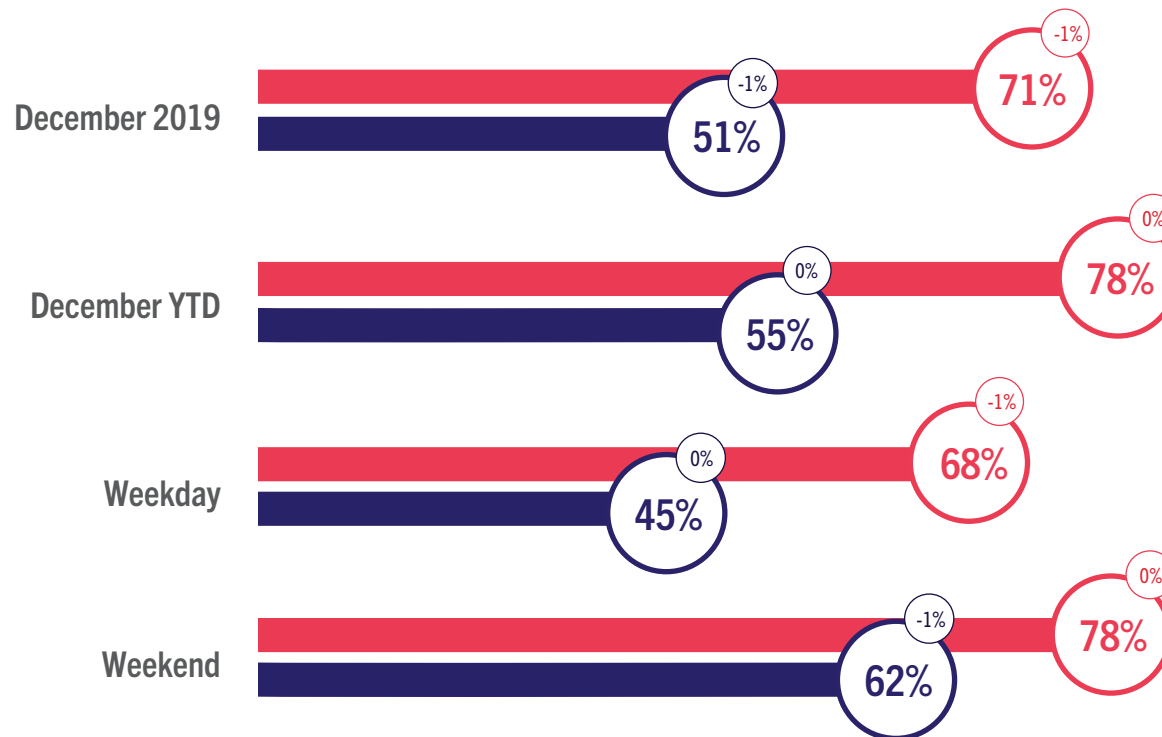
while bedspace increased +1% to 50%. All other establishments with roomspace above 25 saw declines in roomspace occupancy. Establishments with 26-50 rooms declined -1% to 67%, remained level at 49% bedspace. Establishments with 51-100 rooms declined -1% in roomspace and -2% in bedspace. Establishments with 101+ rooms declined -1% in roomspace and -1% in bedspace occupancy.

Looking at room occupancy by **region**, Yorkshire and Humberside was the only region to show increase in room occupancy in December 2019, increasing by +1% to 70% & +1% in bedspace occupancy to 50%. Southwest England remained level at 65%, while bedspace declined -1% to 48%. All other regions reported a decline in room occupancy. Regions that reported -1% fall in room occupancy are; Greater London (81%), Northwest England (69%), East of England (67%) & East Midlands (64%). The Southeast of England saw a decline of -2% to 66% roomspace and West Midlands accommodation saw a decline of -3% to 64%.

England Room and Bedspace Occupancy

At a glance - December 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
December	70%	72%	71%
December YTD	77%	78%	78%
Weekday	69%	69%	68%
Weekend	74%	79%	78%

Bedspace Occupancy	2017	2018	2019
December	52%	52%	51%
December YTD	55%	55%	55%
Weekday	45%	46%	45%
Weekend	61%	63%	62%

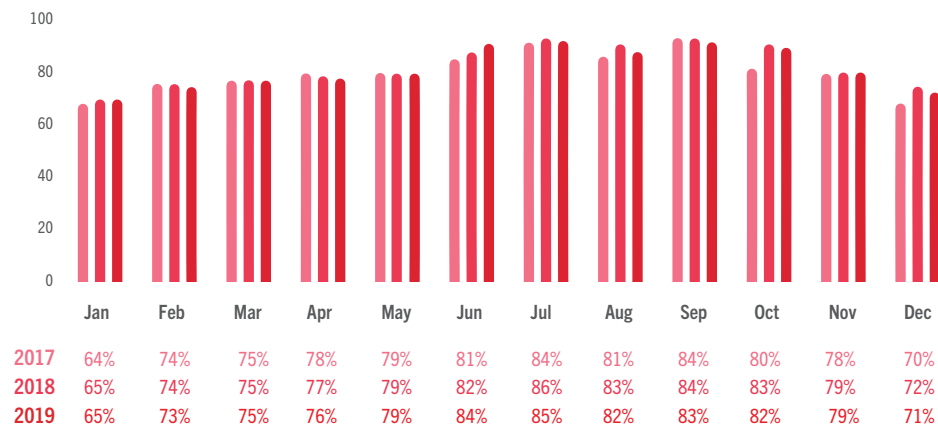
	2017	2018	2019
Room supply	1.8%	2.2%	1.9%
Room demand	1.0%	4.6%	0.5%

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

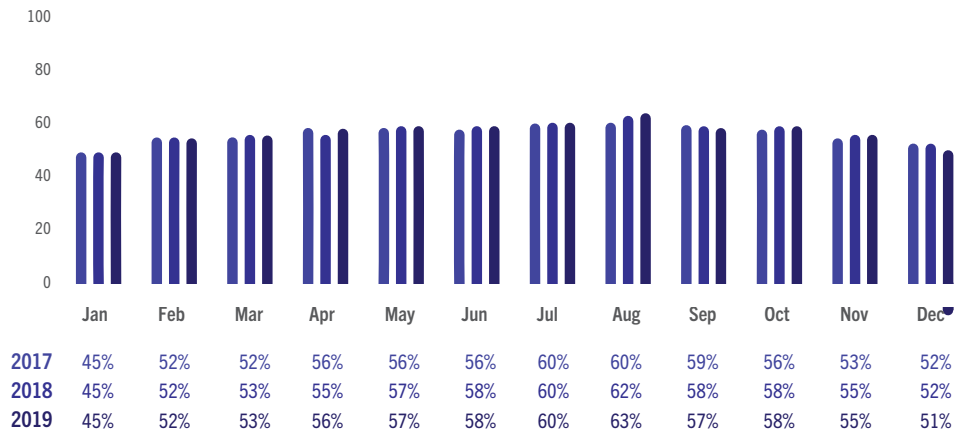


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - December 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
December	£93.08	£97.00	£97.66
Weekday	£93.11	£96.95	£98.26
Weekend	£93.02	£97.13	£96.14

RevPAR

	2017	2018	2019
December	£65.42	£69.76	£69.24
Weekday	£63.79	£67.06	£67.07
Weekend	£68.84	£76.38	£75.47

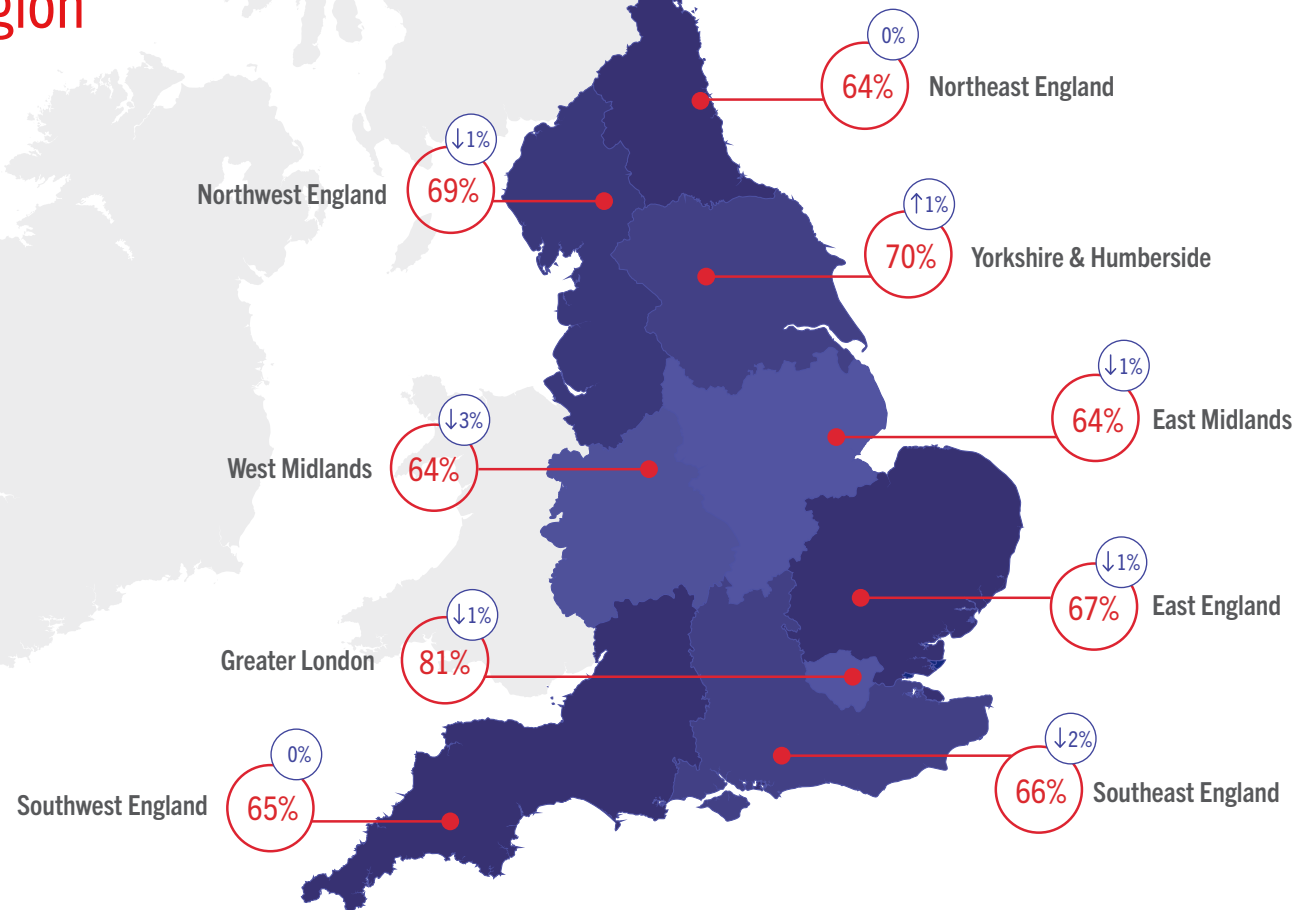


Room Occupancy By Region

At a glance - December 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	68%	68%	67%
East Midlands	63%	65%	64%
Greater London	78%	82%	81%
Northeast England	63%	64%	64%
Northwest England	71%	71%	69%
Southeast England	68%	68%	66%
Southwest England	65%	65%	65%
West Midlands	66%	66%	64%
Yorkshire & Humberside	68%	69%	70%

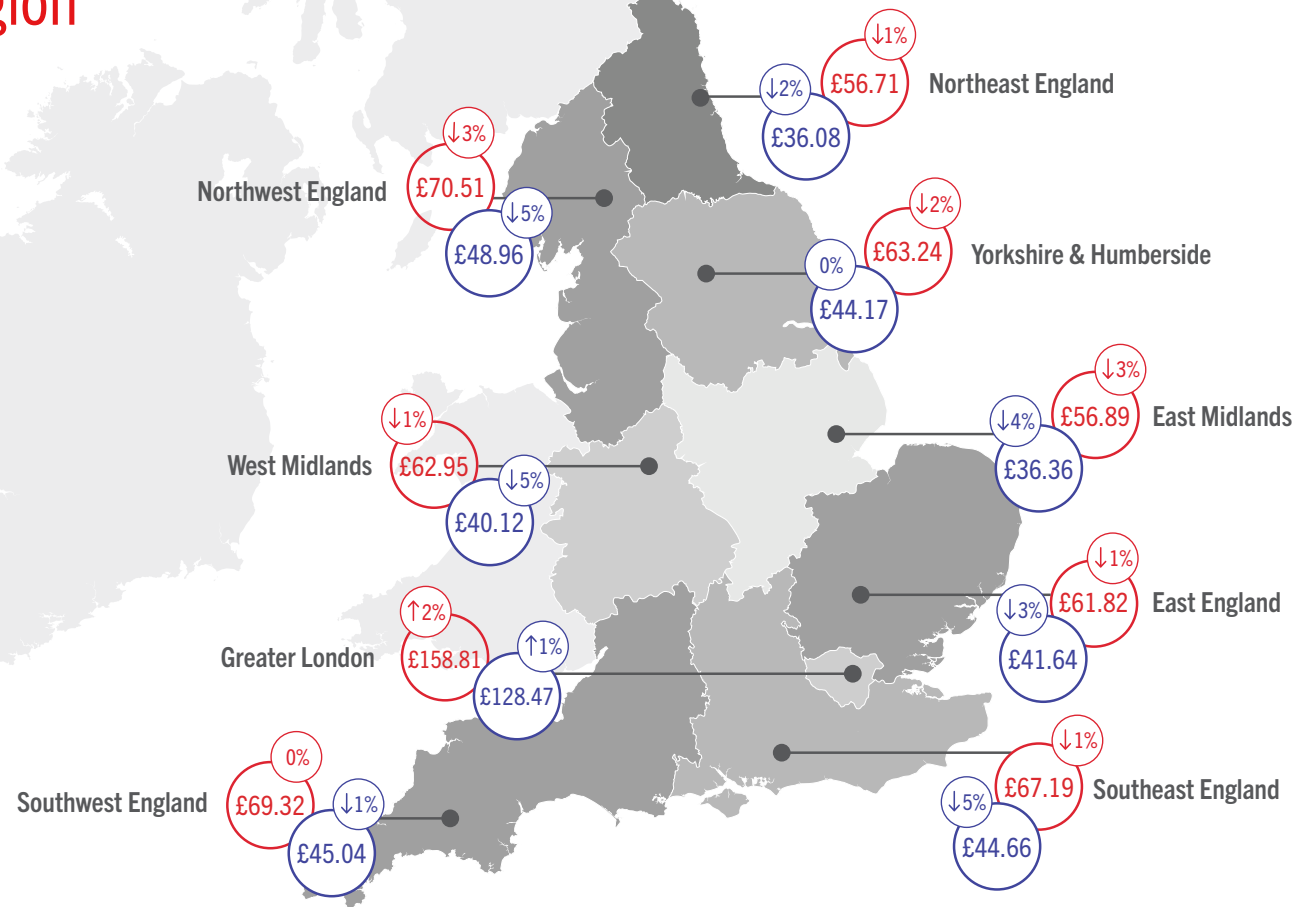
Bedspace Occupancy	2017	2018	2019
East England	50%	50%	49%
East Midlands	47%	48%	46%
Greater London	58%	60%	59%
Northeast England	46%	46%	45%
Northwest England	52%	51%	50%
Southeast England	50%	49%	48%
Southwest England	48%	47%	46%
West Midlands	47%	46%	44%
Yorkshire & Humberside	50%	50%	51%

ADR and RevPAR By Region

At a glance - December 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

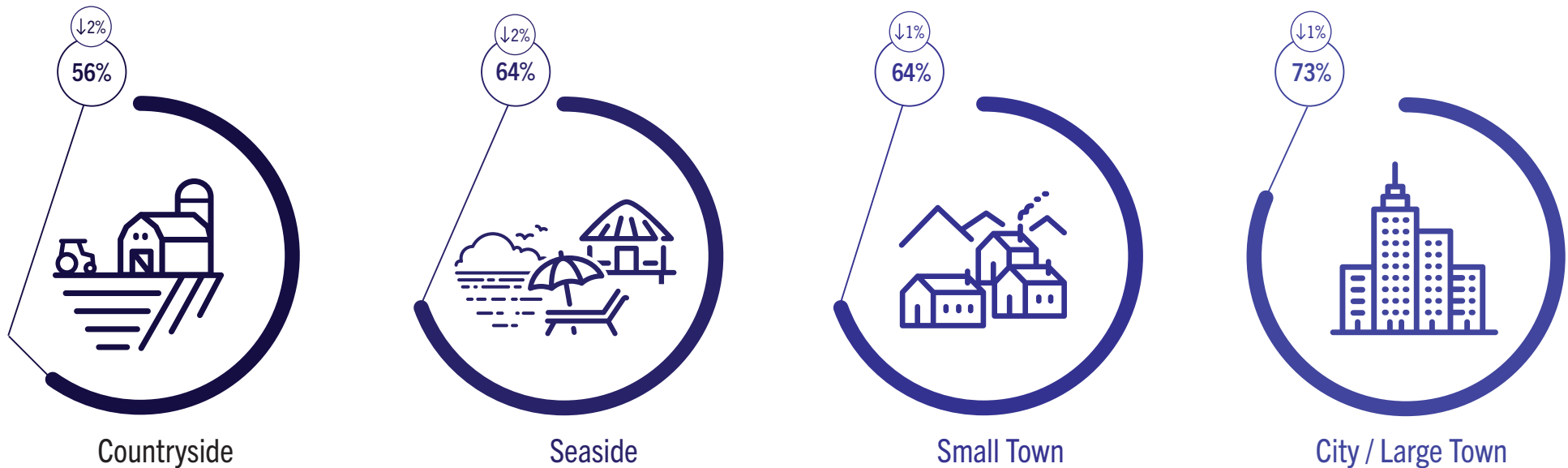
ADR	2017	2018	2019
East England	£61.89	£62.73	£61.82
East Midlands	£57.75	£58.09	£56.89
Greater London	£146.56	£154.99	£158.81
Northeast England	£58.95	£57.45	£56.71
Northwest England	£72.27	£72.75	£70.51
Southeast England	£69.54	£68.96	£67.19
Southwest England	£70.34	£69.59	£69.32
West Midlands	£62.77	£63.59	£62.95
Yorkshire & Humberside	£64.69	£64.24	£63.24

RevPAR	2017	2018	2019
East England	£41.81	£42.78	£41.64
East Midlands	£36.23	£37.95	£36.36
Greater London	£113.97	£126.71	£128.47
Northeast England	£37.08	£36.72	£36.08
Northwest England	£51.03	£51.32	£48.96
Southeast England	£47.17	£46.98	£44.66
Southwest England	£45.84	£45.43	£45.04
West Midlands	£41.49	£42.25	£40.12
Yorkshire & Humberside	£43.69	£44.09	£44.17



Room Occupancy By Destination Type

At a glance - December 2019



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

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	72%	74%	73%
Small Town	63%	64%	64%
Countryside	56%	59%	56%
Seaside	64%	66%	64%

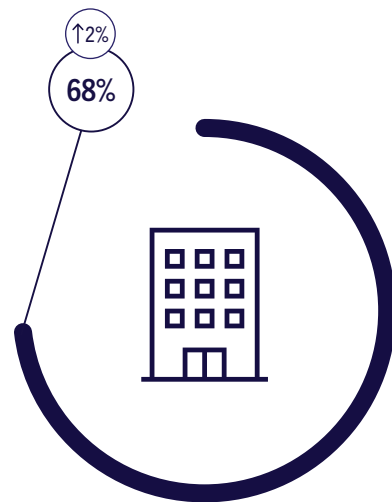
Bedspace Occupancy

	2017	2018	2019
City / Large Town	53%	53%	52%
Small Town	47%	47%	47%
Countryside	40%	41%	39%
Seaside	50%	51%	49%



Room Occupancy By Number of Rooms

At a glance - December 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	64%	66%	68%
26-50 Rooms	67%	67%	67%
51-100 Rooms	69%	70%	69%
101+ Rooms	71%	73%	72%

Bedspace Occupancy	2017	2018	2019
1-25 Rooms	48%	49%	50%
26-50 Rooms	50%	49%	49%
51-100 Rooms	53%	53%	51%
101+ Rooms	52%	53%	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. 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 hotelinfo@str.com.

For more information on STR's other available products and pricing:

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