

England Occupancy Survey

July 2019 Results



Summary of Results

Room occupancy remained level in July at 85%, bedspace occupancy also remained level compared to July 2018 at 60%. In July 2019, there was an increase of +2.3% in room **supply** and an increase of +2.2% 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 +1% in July compared to the previous year at £91.56.

Countryside room occupancy increased by +2% to 79% and bedspace occupancy increased by +1% to 54%. **Small town** room occupancy has shown an increase of +1% at 83%, bedspace increased by +1% to 60%. **City/large town** room occupancy has remained level at 86%, bedspace occupancy decreased by -1% to 59%. **Seaside** room occupancy remained level compared to the same month 2018, at 87%, bedspace occupancy decreased by -1% to 65%.

Looking at occupancy rates by **establishment size**, establishments with 1 – 25 rooms showed the greatest increase of +2% in room occupancy to 83%, with an increase of +1% in bedspace occupancy in July

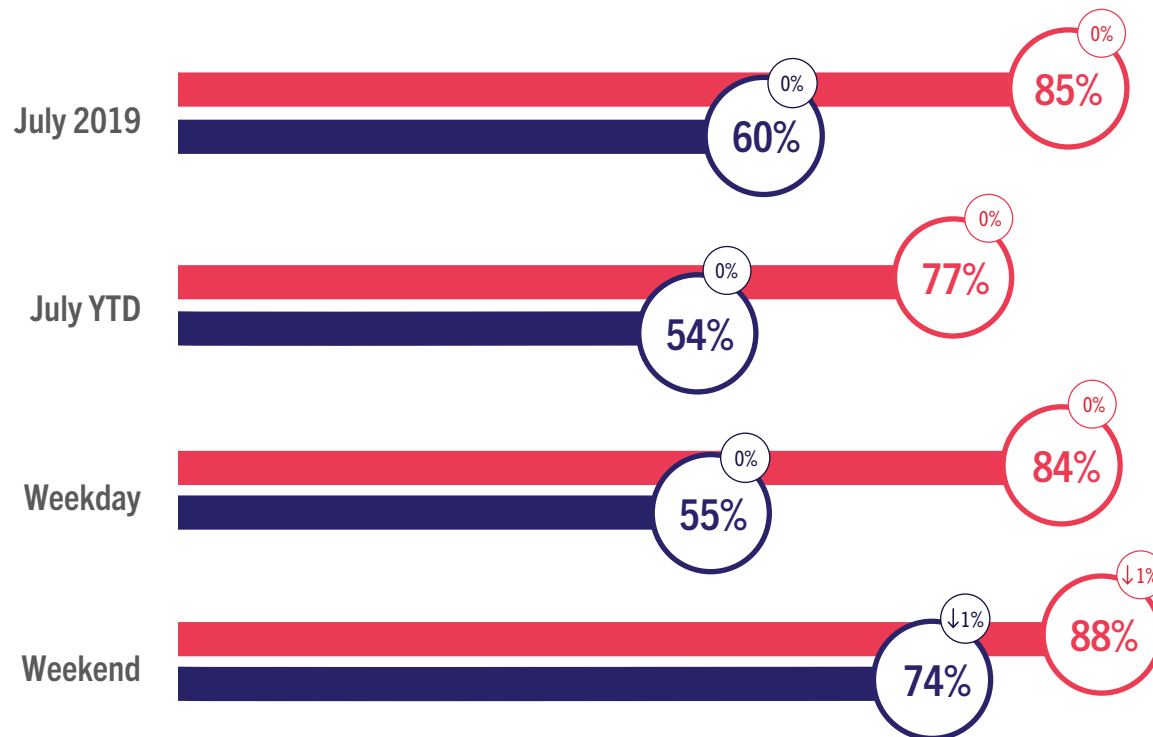
2019. All other measured room sizes remained level for room space occupancy. Establishments of 26-50 rooms at 83% room occupancy declined in bedspace occupancy by -1% to 59%. Establishments of 51-100 rooms at 84% room occupancy remained at level bedspace occupancy at 61%, and establishments with over 101 rooms at 86% room occupancy declined in bedspace occupancy by -1% to 60% compared to the same period in 2018.

Looking at room occupancy by **region**, the greatest increase was seen in Yorkshire and Humber, up +3% compared to July 2018 to 83%, with bedspace occupancy up +1% to 58%. North East England and the East Midlands increased +2% & +1% to 82% and 79% respectively, while bedspace occupancy also rose by +2% & +1% to 58% and 55%. South West England, East of England, North West England & West Midlands all remained level compared to the same period last year at 87%, 84%, 83% & 77%. South East England and Greater London both saw a decline of -2% and -1% in room occupancy respectively.

England Room and Bedspace Occupancy

At a glance - July 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
July	84%	86%	85%
July YTD	76%	77%	77%
Weekday	83%	84%	84%
Weekend	88%	89%	88%

Bedspace Occupancy	2017	2018	2019
July	60%	60%	60%
July YTD	54%	54%	54%
Weekday	54%	55%	55%
Weekend	74%	75%	74%

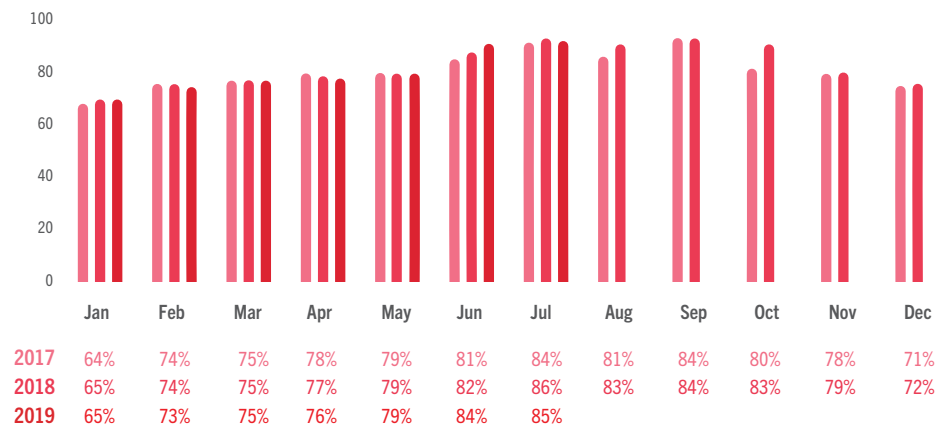
	2017	2018	2019
Room supply	1.8%	1.5%	2.3%
Room demand	1.7%	3.0%	2.2%

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

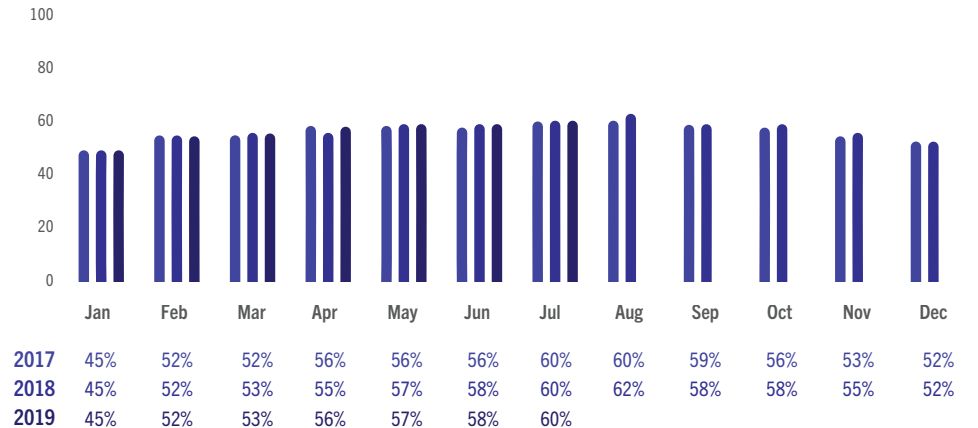


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



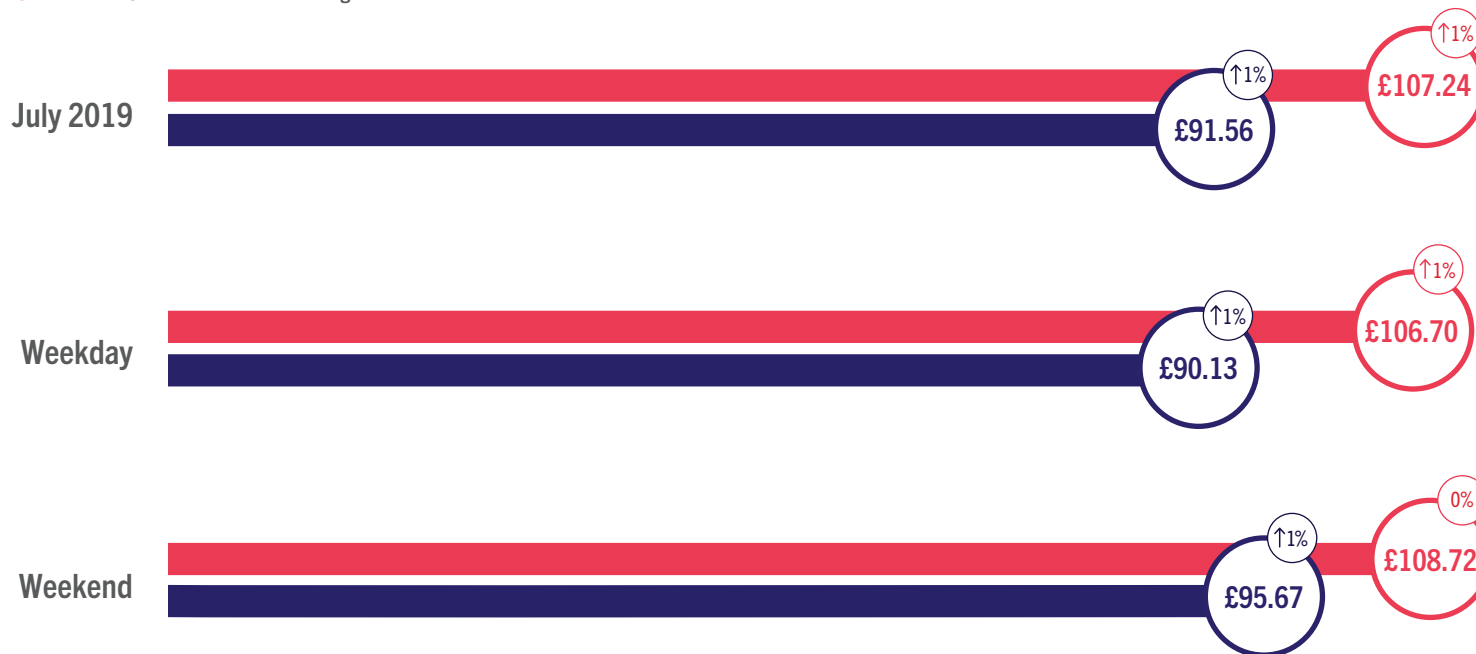
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - July 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
July	£101.80	£106.42	£107.24
Weekday	£100.98	£105.99	£106.70
Weekend	£103.71	£107.60	£108.72

RevPAR

	2017	2018	2019
July	£85.73	£90.99	£91.56
Weekday	£83.62	£89.39	£90.13
Weekend	£90.90	£95.61	£95.67

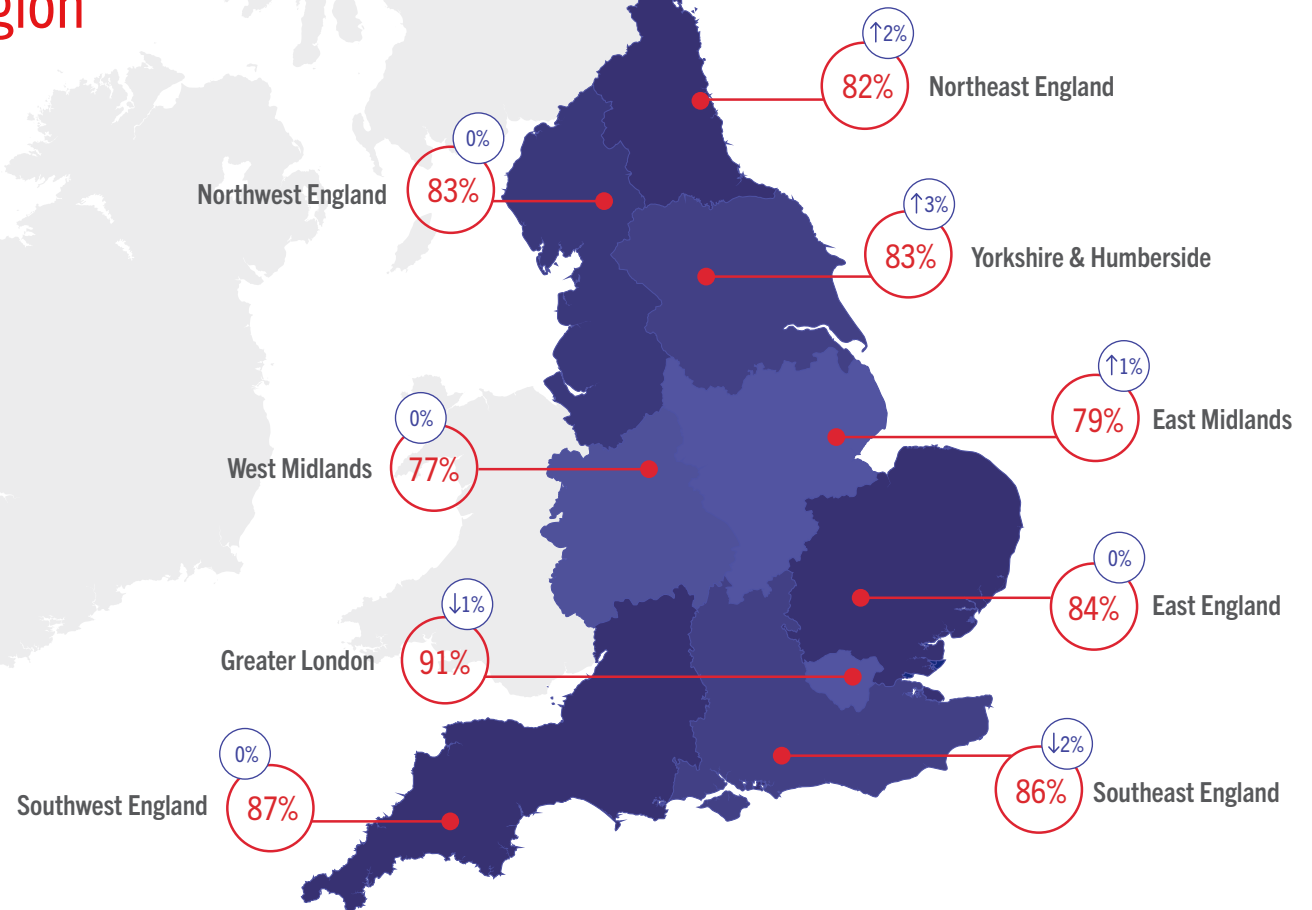


Room Occupancy By Region

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

Bedspace Occupancy	2017	2018	2019
East England	59%	59%	59%
East Midlands	56%	54%	55%
Greater London	64%	66%	65%
Northeast England	57%	56%	58%
Northwest England	59%	59%	58%
Southeast England	61%	62%	60%
Southwest England	61%	60%	60%
West Midlands	52%	51%	51%
Yorkshire & Humberside	58%	57%	58%

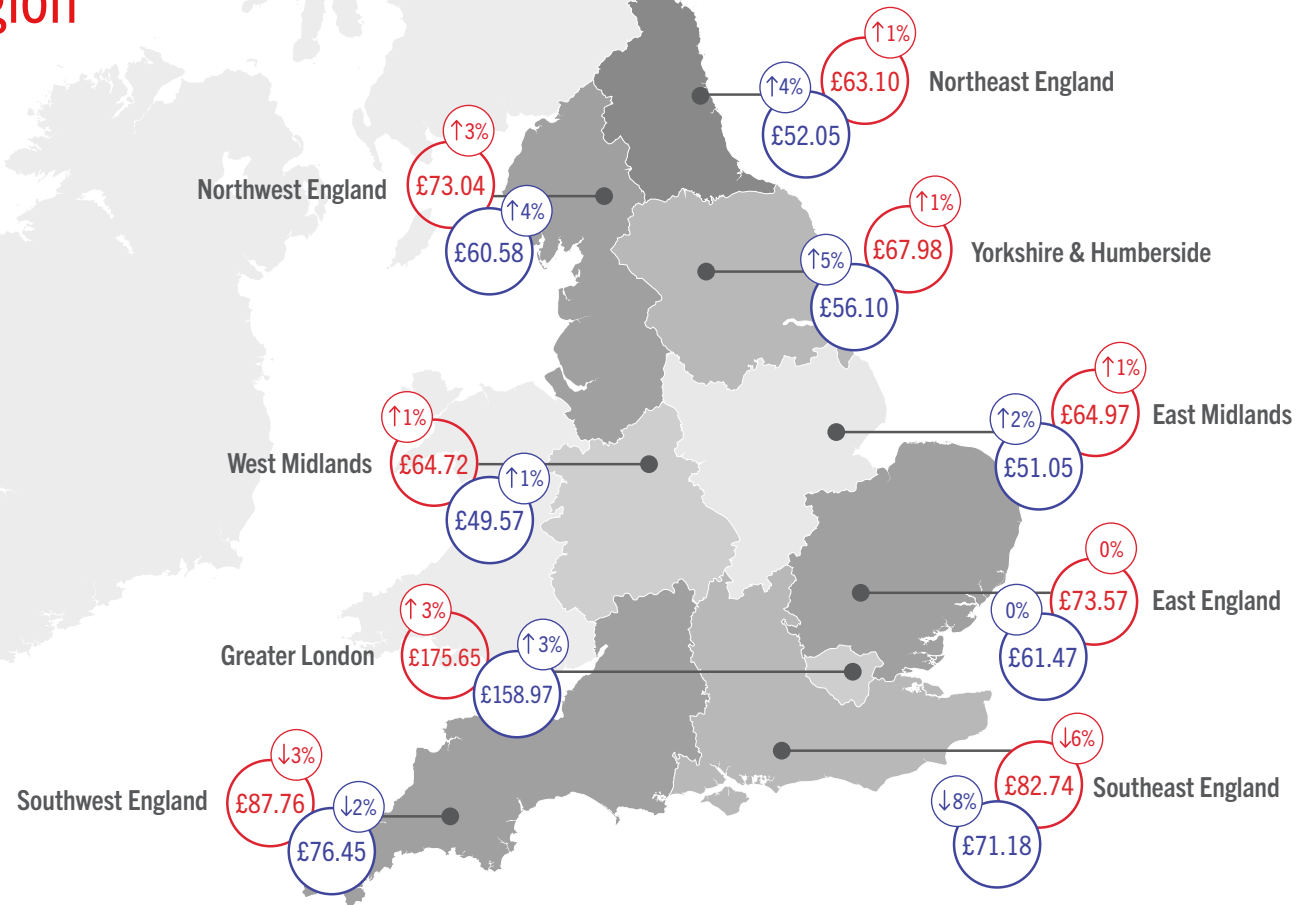


ADR and RevPAR By Region

At a glance - July 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	£73.18	£73.80	£73.57
East Midlands	£64.34	£64.63	£64.97
Greater London	£163.06	£169.80	£175.65
Northeast England	£62.67	£62.23	£63.10
Northwest England	£73.46	£70.60	£73.04
Southeast England	£81.91	£87.83	£82.74
Southwest England	£88.36	£90.29	£87.76
West Midlands	£62.10	£64.22	£64.72
Yorkshire & Humberside	£66.77	£67.02	£67.98

RevPAR	2017	2018	2019
East England	£60.73	£61.68	£61.47
East Midlands	£51.00	£50.04	£51.05
Greater London	£142.82	£154.79	£158.97
Northeast England	£50.13	£49.85	£52.05
Northwest England	£60.24	£58.48	£60.58
Southeast England	£70.84	£77.11	£71.18
Southwest England	£77.18	£78.27	£76.45
West Midlands	£47.30	£48.99	£49.57
Yorkshire & Humberside	£54.20	£53.42	£56.10



Room Occupancy By Destination Type

At a glance - July 2019



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	84%	86%	86%
Small Town	81%	82%	83%
Countryside	78%	77%	79%
Seaside	86%	87%	87%

Bedspace Occupancy

	2017	2018	2019
City / Large Town	59%	60%	59%
Small Town	59%	59%	60%
Countryside	54%	53%	54%
Seaside	66%	66%	65%



Room Occupancy By Number of Rooms

At a glance - July 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	82%	81%	83%
26-50 Rooms	83%	83%	83%
51-100 Rooms	84%	83%	84%
101+ Rooms	85%	87%	86%

Bedspace Occupancy

	2017	2018	2019
1-25 Rooms	60%	59%	60%
26-50 Rooms	60%	60%	59%
51-100 Rooms	62%	61%	61%
101+ Rooms	60%	61%	60%



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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