

England Occupancy Survey

November 2019 Results



Summary of Results

Room occupancy remained level in November at 79%, bedspace occupancy increased, +1% compared to November 2018 at 55%. In November 2019, there was an increase of +2.0% in room supply and an increase of +2.4% 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 November compared to the previous year at £77.76.

Looking at **destination type**, Countryside room occupancy increased by +1% to 65% and bedspace occupancy increased by +1% to 44% in November 2019. All other destination types remained level in room occupancy compared to the same month 2018. City/Large town at 81% room occupancy, increased +1% in bedspace to 56%. Seaside locations at 71% room occupancy increased +1% in bedspace to 52% and Small towns at 71% room occupancy remained level in bedspace at 51%

Looking at occupancy by **establishment size**, establishments with 12-25 rooms saw the greatest increase in room occupancy, up +4%

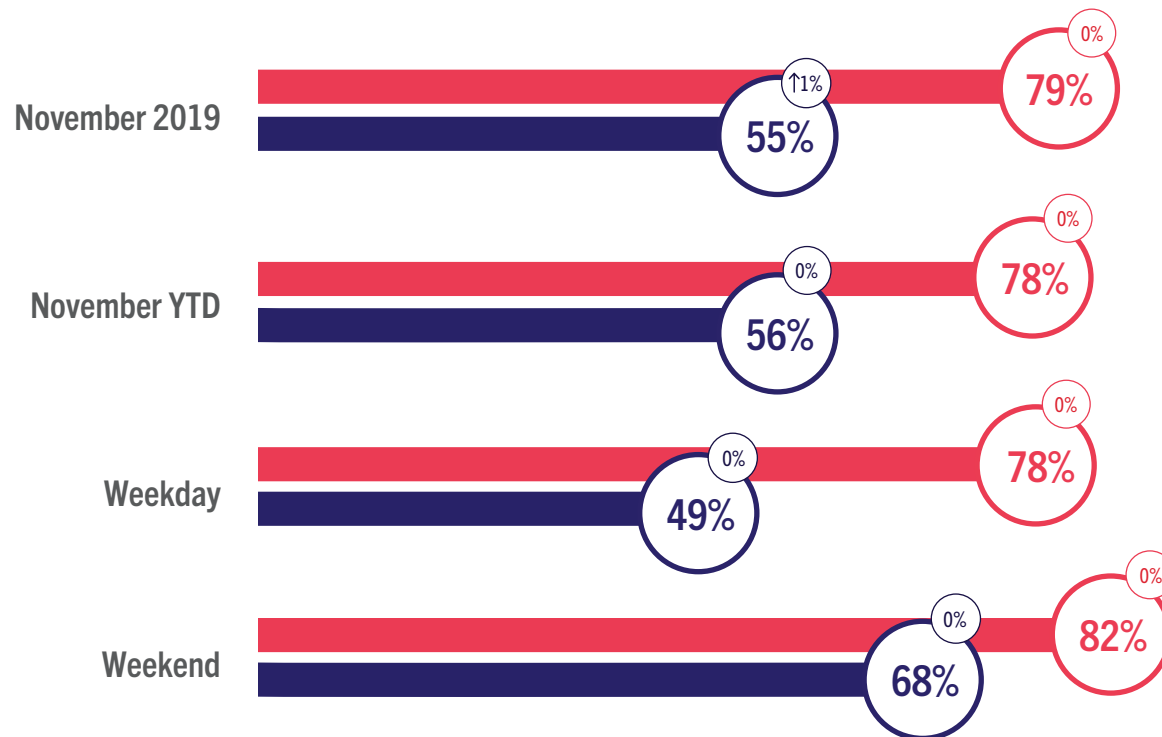
to 74% while bedspace increased +3% to 53%. Establishments with 26-50 rooms and 51-100 rooms both increased +1% in roomspace occupancy. Establishment with 26-50 rooms at 75% room occupancy increased +2% in bedspace to 54%, Establishments with 51-100 rooms at 77% room occupancy increased +1% in bedspace. Establishment with 101+ rooms remained level in roomspace occupancy and increased +1% in bedspace.

Yorkshire and Humberside and Northeast England both increased by +3% to 80% and 76% respectively, both regions also increased +3% in bedspace occupancy to 57% and 54%. West Midland increased +1% to 79% in room occupancy and +1% in bedspace occupancy, East Midland increased +1% to 75% in roomspace and +1% in bedspace occupancy to 52%. Southwest region increased +1% in Roomspace to 74% and +1% in bedspace. Regions East of England, Northwest England and Greater London all remained level in roomspace occupancy. Southwest England was the only region to decline in room occupancy in November 2019.

England Room and Bedspace Occupancy

At a glance - November 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
November	78%	79%	79%
November YTD	78%	79%	78%
Weekday	77%	77%	78%
Weekend	80%	81%	82%

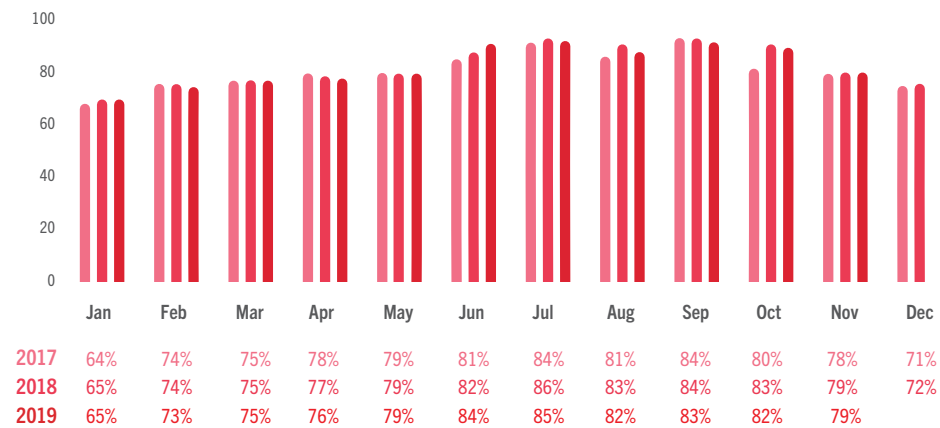
Bedspace Occupancy	2017	2018	2019
November	53%	54%	55%
November YTD	55%	56%	56%
Weekday	48%	49%	49%
Weekend	67%	67%	68%

	2017	2018	2019
Room supply	1.9%	2.0%	2.0%
Room demand	0.2%	3.1%	2.4%

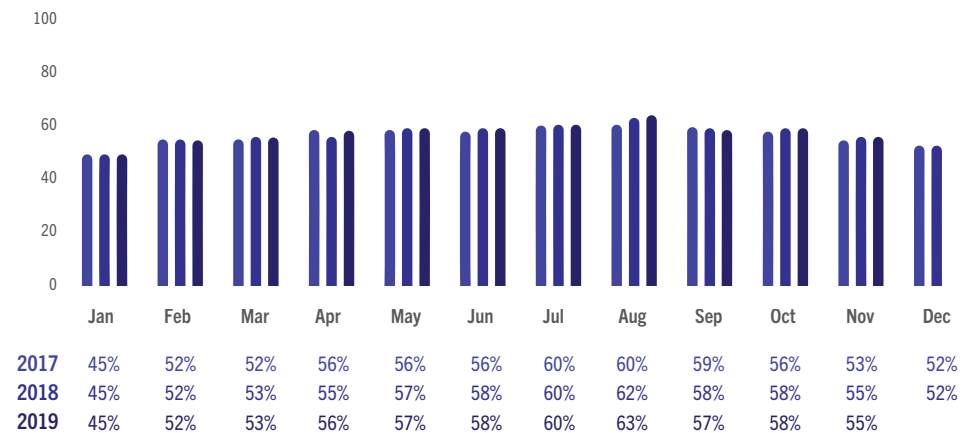
Table to the left shows the room supply and room demand year on year relative percentage change.

England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



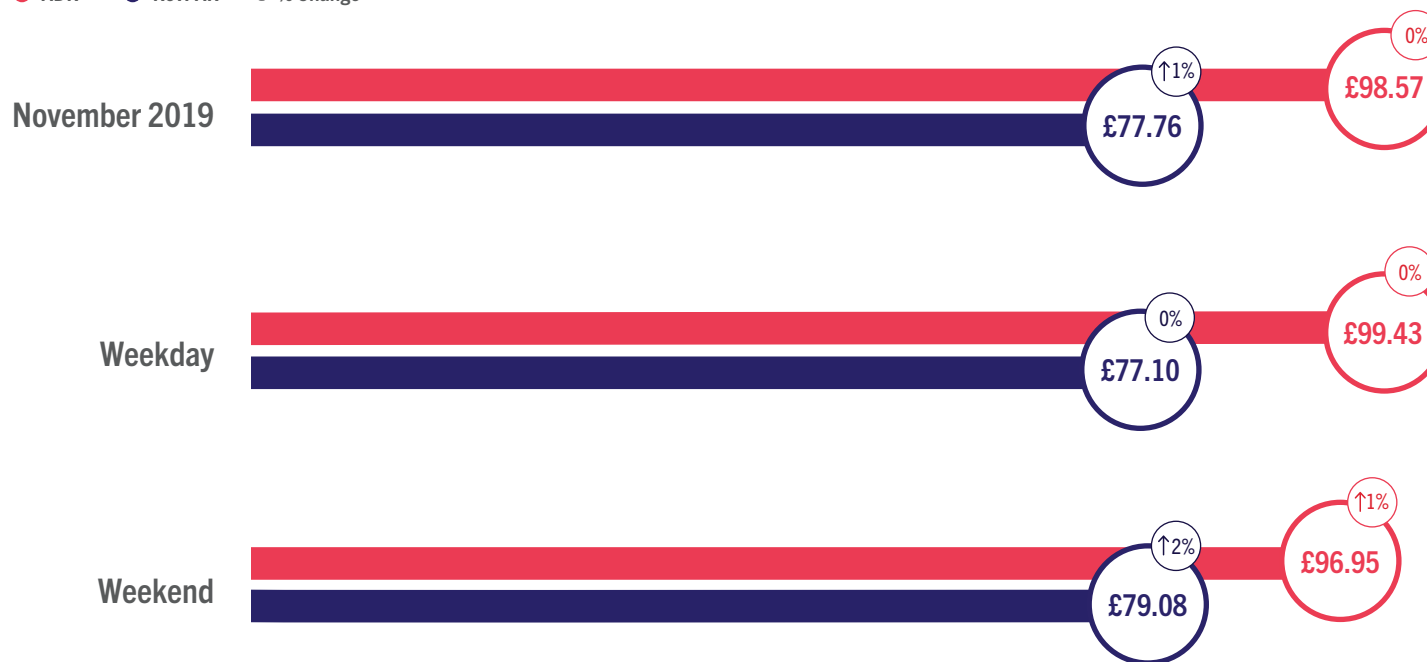
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - November 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
November	£96.25	£98.13	£98.57
Weekday	£97.07	£99.28	£99.43
Weekend	£94.11	£95.58	£96.95

RevPAR

	2017	2018	2019
November	£74.82	£77.10	£77.76
Weekday	£74.58	£76.80	£77.10
Weekend	£75.48	£77.80	£79.08

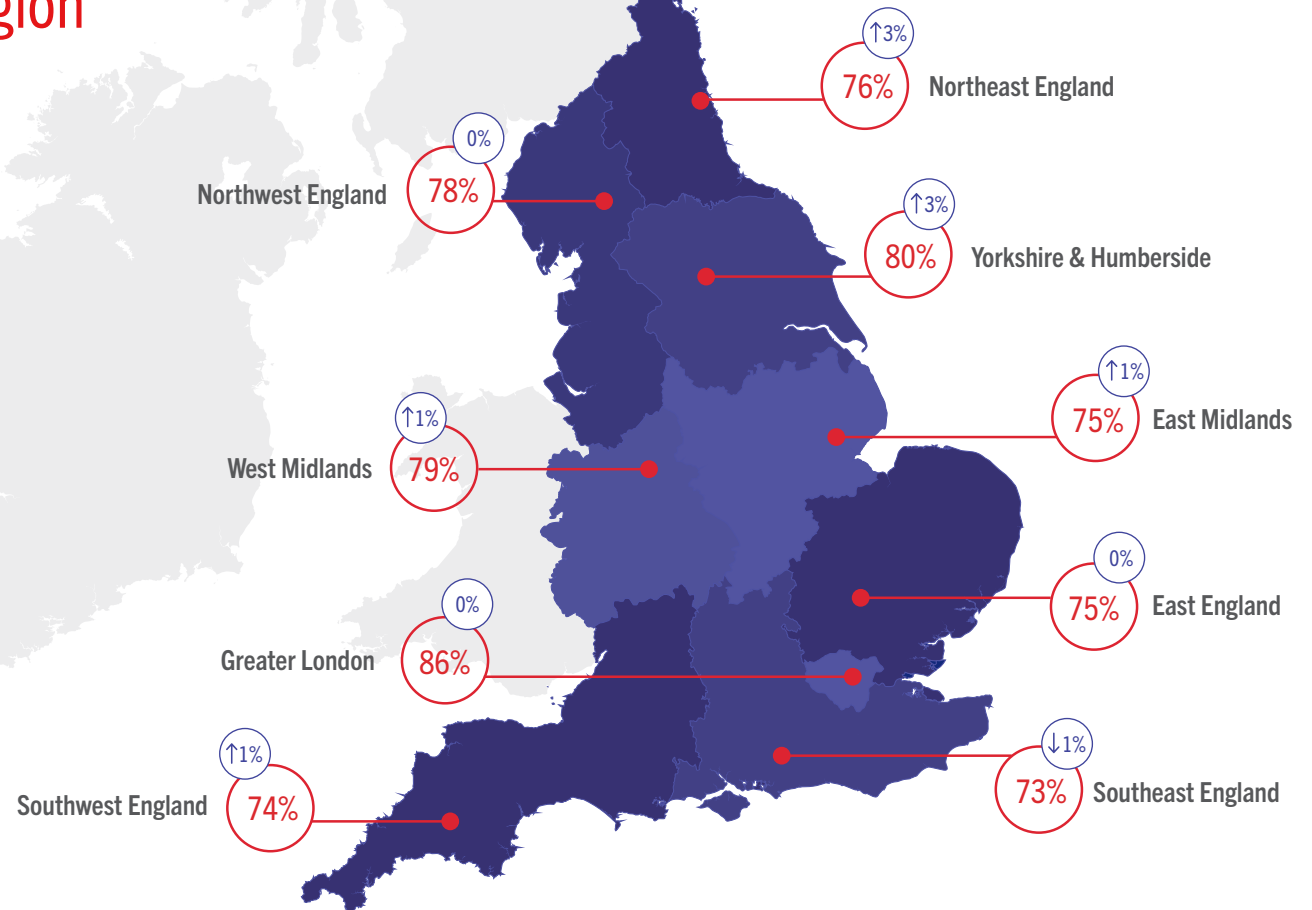


Room Occupancy By Region

At a glance - November 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	75%	75%	75%
East Midlands	73%	74%	75%
Greater London	84%	86%	86%
Northeast England	75%	73%	76%
Northwest England	78%	78%	78%
Southeast England	74%	74%	73%
Southwest England	72%	72%	74%
West Midlands	79%	78%	79%
Yorkshire & Humberside	76%	77%	80%

Bedspace Occupancy	2017	2018	2019
East England	51%	52%	53%
East Midlands	50%	51%	52%
Greater London	59%	61%	61%
Northeast England	51%	51%	54%
Northwest England	54%	54%	55%
Southeast England	50%	51%	51%
Southwest England	49%	50%	51%
West Midlands	52%	52%	53%
Yorkshire & Humberside	53%	54%	57%

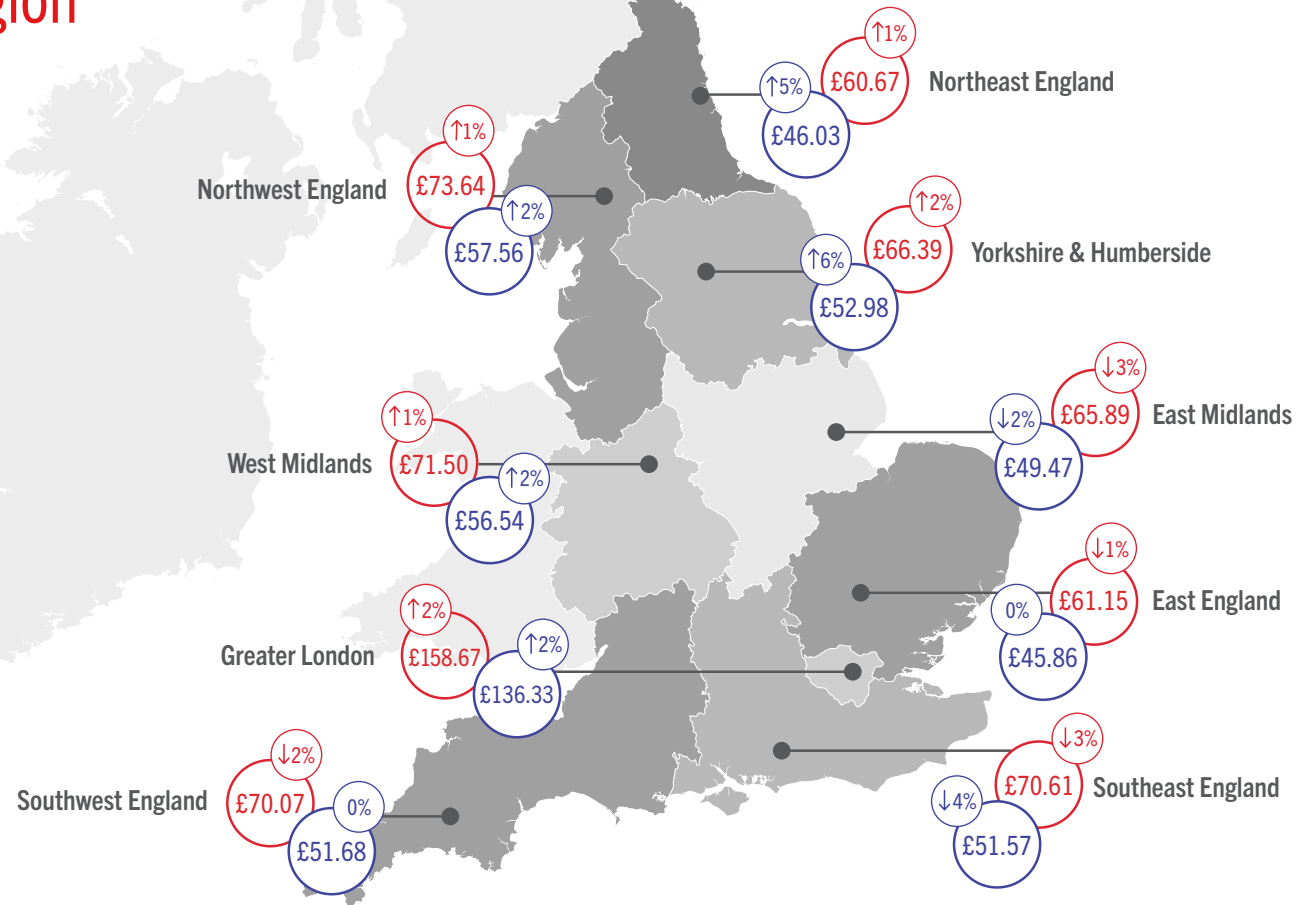


ADR and RevPAR By Region

At a glance - November 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	£67.52	£67.82	£65.89
East Midlands	£61.87	£61.84	£61.15
Greater London	£151.57	£155.53	£158.67
Northeast England	£62.91	£60.06	£60.67
Northwest England	£73.18	£72.69	£73.64
Southeast England	£73.73	£72.53	£70.61
Southwest England	£71.62	£71.53	£70.07
West Midlands	£70.86	£71.09	£71.50
Yorkshire & Humberside	£66.54	£65.20	£66.39

RevPAR	2017	2018	2019
East England	£50.32	£50.61	£49.47
East Midlands	£45.44	£45.92	£45.86
Greater London	£126.80	£133.92	£136.33
Northeast England	£46.96	£44.02	£46.03
Northwest England	£57.24	£56.70	£57.56
Southeast England	£54.35	£53.62	£51.57
Southwest England	£51.58	£51.85	£51.68
West Midlands	£55.67	£55.58	£56.54
Yorkshire & Humberside	£50.69	£50.05	£52.98



Room Occupancy By Destination Type

At a glance - November 2019



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	80%	80%	81%
Small Town	70%	71%	71%
Countryside	62%	63%	65%
Seaside	69%	71%	71%

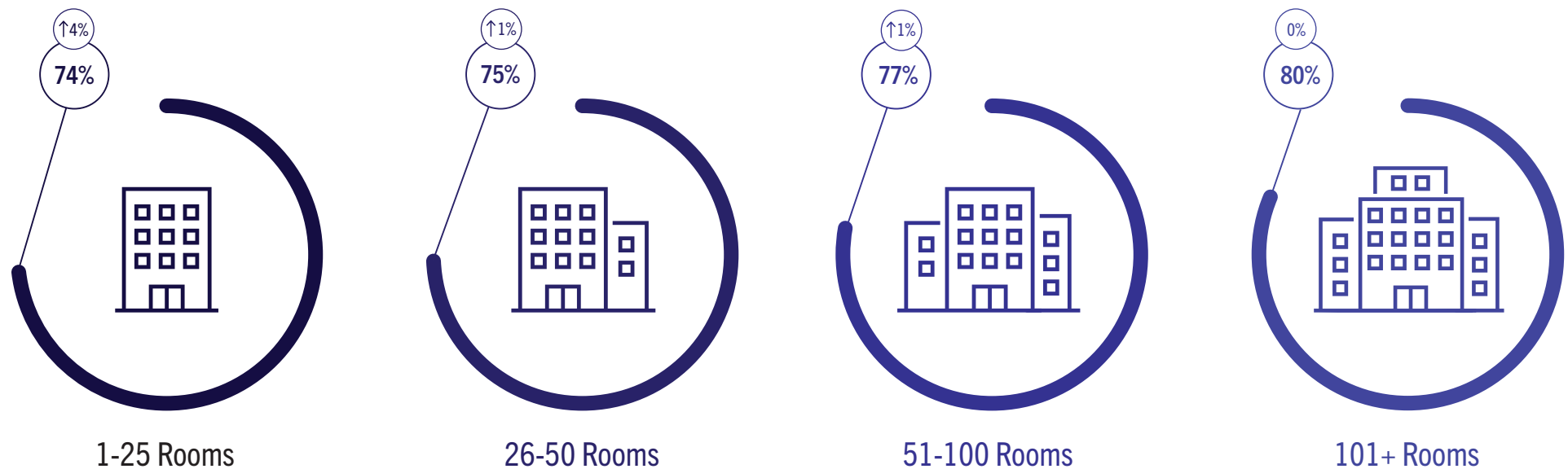
Bedspace Occupancy

	2017	2018	2019
City / Large Town	54%	55%	56%
Small Town	50%	51%	51%
Countryside	41%	43%	44%
Seaside	50%	51%	52%



Room Occupancy By Number of Rooms

At a glance - November 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	73%	70%	74%
26-50 Rooms	73%	74%	75%
51-100 Rooms	76%	76%	77%
101+ Rooms	79%	80%	80%

Bedspace Occupancy	2017	2018	2019
1-25 Rooms	51%	50%	53%
26-50 Rooms	52%	52%	54%
51-100 Rooms	54%	55%	56%
101+ Rooms	54%	55%	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 hotelinfo@str.com.

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

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