England Occupancy Survey

September 2017 Results
Summary of Results

**Room occupancy** in September decreased 1% to 84%, whilst bedspace occupancy was unchanged when compared to September 2016 at 57%.

The change in room occupancy was led by an increase in room supply of 2.5% compared to an increase of only 1.6% in demand compared to the same month in 2016.

**RevPar**, which is the total room revenue divided by the total number of available rooms, increased 1% in September to £85.90 compared to the previous year.

**Seaside** was unchanged at 85% for room occupancy and 61% for bedspace occupancy.

**City/large town** room occupancy decreased 1% to 84% whilst bedspace was unchanged at 57%.

**Small town** room occupancy decreased 1% to 82% and remained unchanged at 57% for bedspace occupancy, with countryside occupancy decreasing by 2% for room occupancy to 79% while bedspace occupancy decreased -1% to 52%.

Looking at room and bedspace occupancy rates by **number of rooms** all categories remained relatively unchanged with changes of 2% or less.

Looking at occupancy by **region**, the largest shift for room occupancy came from the North East with a 4% increase. All other regions remained relatively unchanged with 2% or less change. For bedspace occupancy, the largest shift also came for the North East which increased by 3%, but all other regions remained relatively unchanged with 2% or less change.
England Room and Bedspace Occupancy
At a glance - September 2017

- Room Space
- Bedspace
- % Change

Sept 2017:
- Room Space: 57%
- Bedspace: 84%
- Change: -1%

Sept YTD:
- Room Space: 71%
- Bedspace: 78%
- Change: -71%

Weekday:
- Room Space: 53%
- Bedspace: 84%
- Change: -11%

Weekend:
- Room Space: 73%
- Bedspace: 85%
- Change: -11%
**England Room and Bedspace Occupancy**

**Data Tables**

<table>
<thead>
<tr>
<th>Room Occupancy</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept 2017</td>
<td>85%</td>
<td>85%</td>
<td>84%</td>
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<tr>
<td>Sept YTD</td>
<td>76%</td>
<td>77%</td>
<td>78%</td>
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<tr>
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</tr>
<tr>
<td>Weekend</td>
<td>87%</td>
<td>86%</td>
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<table>
<thead>
<tr>
<th>Bedspace Occupancy</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept 2017</td>
<td>56%</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>Sept YTD</td>
<td>54%</td>
<td>55%</td>
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<tr>
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<tr>
<td>Weekend</td>
<td>73%</td>
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<tr>
<td></td>
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<td>2.8%</td>
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<thead>
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<tr>
<td></td>
<td>1.8%</td>
<td>1.7%</td>
<td>1.6%</td>
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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

<table>
<thead>
<tr>
<th>Year</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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</thead>
<tbody>
<tr>
<td>2015</td>
<td>63%</td>
<td>74%</td>
<td>75%</td>
<td>76%</td>
<td>79%</td>
<td>83%</td>
<td>84%</td>
<td>82%</td>
<td>85%</td>
<td>83%</td>
<td>77%</td>
<td>69%</td>
</tr>
<tr>
<td>2016</td>
<td>62%</td>
<td>73%</td>
<td>73%</td>
<td>77%</td>
<td>78%</td>
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<td>71%</td>
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<tr>
<td>2017</td>
<td>64%</td>
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<td>75%</td>
<td>78%</td>
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<td>84%</td>
<td>81%</td>
<td>84%</td>
<td>79%</td>
<td>71%</td>
<td>69%</td>
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</table>

England Bedspace Occupancy by Month

<table>
<thead>
<tr>
<th>Year</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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</thead>
<tbody>
<tr>
<td>2015</td>
<td>45%</td>
<td>53%</td>
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<td>58%</td>
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<td>61%</td>
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<td>59%</td>
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<tr>
<td>2016</td>
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<td>52%</td>
<td>56%</td>
<td>55%</td>
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<td>61%</td>
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<td>52%</td>
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<tr>
<td>2017</td>
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<td>58%</td>
<td>56%</td>
<td>56%</td>
<td>60%</td>
<td>60%</td>
<td>57%</td>
<td>57%</td>
<td>54%</td>
<td>52%</td>
</tr>
</tbody>
</table>
England ADR and RevPAR
At a glance - September 2017

- **Sept 2017**
  - ADR: £85.90, +1%
  - RevPAR: £102.04, +2%

- **Weekday**
  - ADR: £87.27, +2%
  - RevPAR: £104.12, +3%

- **Weekend**
  - ADR: £83.17
  - RevPAR: £97.93, +1%
## England ADR and RevPAR

### Data Tables

<table>
<thead>
<tr>
<th>ADR</th>
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<th>2017</th>
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<tr>
<td>Sept 2017</td>
<td>£98.92</td>
<td>£100.07</td>
<td>£102.04</td>
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<td>£100.13</td>
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<td>£95.73</td>
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<td>Weekday</td>
<td>£84.45</td>
<td>£85.56</td>
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<tr>
<td>Weekend</td>
<td>£83.64</td>
<td>£83.45</td>
<td>£83.17</td>
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Room Occupancy By Region
At a glance - September 2017

*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.
## Occupancy By Region

Data Tables - September 2017

<table>
<thead>
<tr>
<th>Room Occupancy</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
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<tbody>
<tr>
<td>East England</td>
<td>83%</td>
<td>83%</td>
<td>82%</td>
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<tr>
<td>East Midlands</td>
<td>80%</td>
<td>80%</td>
<td>81%</td>
</tr>
<tr>
<td>Greater London</td>
<td>89%</td>
<td>89%</td>
<td>87%</td>
</tr>
<tr>
<td>Northeast England</td>
<td>82%</td>
<td>78%</td>
<td>82%</td>
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<tr>
<td>Northwest England</td>
<td>82%</td>
<td>83%</td>
<td>81%</td>
</tr>
<tr>
<td>Southeast England</td>
<td>86%</td>
<td>85%</td>
<td>85%</td>
</tr>
<tr>
<td>Southwest England</td>
<td>88%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>81%</td>
<td>82%</td>
<td>81%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>83%</td>
<td>83%</td>
<td>81%</td>
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<table>
<thead>
<tr>
<th>Bedspace Occupancy</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>East England</td>
<td>55%</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>53%</td>
<td>54%</td>
<td>55%</td>
</tr>
<tr>
<td>Greater London</td>
<td>60%</td>
<td>61%</td>
<td>60%</td>
</tr>
<tr>
<td>Northeast England</td>
<td>54%</td>
<td>53%</td>
<td>56%</td>
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<tr>
<td>Northwest England</td>
<td>54%</td>
<td>56%</td>
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</tr>
<tr>
<td>Southeast England</td>
<td>57%</td>
<td>57%</td>
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<tr>
<td>Southwest England</td>
<td>58%</td>
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<td>West Midlands</td>
<td>52%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>56%</td>
<td>57%</td>
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ADR and RevPAR By Region
At a glance - September 2017

*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 and RevPAR By Region

Data Tables - September 2017

<table>
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<tr>
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<th>2017</th>
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<td>£59.46</td>
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<td>West Midlands</td>
<td>£65.95</td>
<td>£68.43</td>
<td>£71.16</td>
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<tr>
<td>Yorkshire &amp; Humberside</td>
<td>£61.93</td>
<td>£64.39</td>
<td>£66.29</td>
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<table>
<thead>
<tr>
<th>Region</th>
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<th>2017</th>
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<td>£51.16</td>
<td>£53.24</td>
<td>£53.80</td>
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Room Occupancy By Destination Type
At a glance - September 2017

- **Countryside**: 79% (↓2%)
- **Seaside**: 85% (↓1%)
- **Small Town**: 82% (0%)
- **City / Large Town**: 84% (↓1%)
## Occupancy By Location Type

Data Tables - September 2017

<table>
<thead>
<tr>
<th>Location Type</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>City / Large Town</td>
<td>85%</td>
<td>85%</td>
<td>84%</td>
</tr>
<tr>
<td>Small Town</td>
<td>84%</td>
<td>83%</td>
<td>82%</td>
</tr>
<tr>
<td>Countryside</td>
<td>82%</td>
<td>81%</td>
<td>79%</td>
</tr>
<tr>
<td>Seaside</td>
<td>84%</td>
<td>85%</td>
<td>85%</td>
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<table>
<thead>
<tr>
<th>Location Type</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
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</thead>
<tbody>
<tr>
<td>City / Large Town</td>
<td>56%</td>
<td>57%</td>
<td>57%</td>
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<tr>
<td>Small Town</td>
<td>58%</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>Countryside</td>
<td>53%</td>
<td>53%</td>
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<tr>
<td>Seaside</td>
<td>58%</td>
<td>61%</td>
<td>61%</td>
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</table>
Room Occupancy By Number of Rooms

At a glance - September 2017

- 1-25 Rooms: 84%
- 26-50 Rooms: 83%
- 51-100 Rooms: 84%
- 101+ Rooms: 85%

The data shows a slight decrease in occupancy from the previous month.
## Occupancy By Number of Rooms

Data Tables - September 2017

<table>
<thead>
<tr>
<th>Room Occupancy</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-25 Rooms</td>
<td>84%</td>
<td>83%</td>
<td>81%</td>
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<tr>
<td>26-50 Rooms</td>
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<tr>
<td>51-100 Rooms</td>
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<tr>
<td>101+ Rooms</td>
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<tr>
<td>1-25 Rooms</td>
<td>57%</td>
<td>58%</td>
<td>56%</td>
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<tr>
<td>26-50 Rooms</td>
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<tr>
<td>51-100 Rooms</td>
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<tr>
<td>101+ Rooms</td>
<td>57%</td>
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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.

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.
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:

strglobal.com
+44 (0) 207 922 1930
hotelinfo@str.com