

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%.

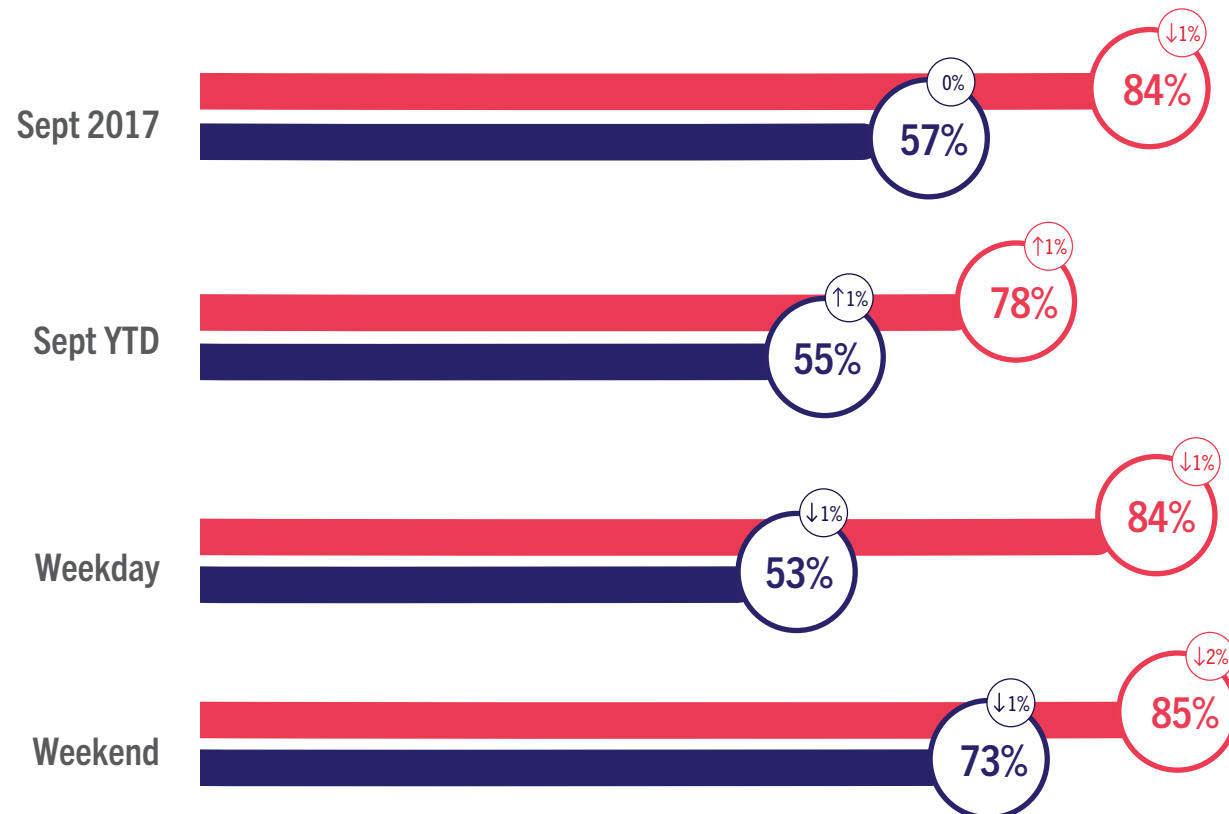
Looking at room and bedspace occupancy rates by **number of rooms** all categories remained relatively unchanged with changes of 2% or less.

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



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2015	2016	2017
Sept 2017	85%	85%	84%
Sept YTD	76%	77%	78%
Weekday	84%	84%	84%
Weekend	87%	86%	85%

Bedspace Occupancy	2015	2016	2017
Sept 2017	56%	57%	57%
Sept YTD	54%	55%	55%
Weekday	53%	53%	53%
Weekend	73%	73%	73%

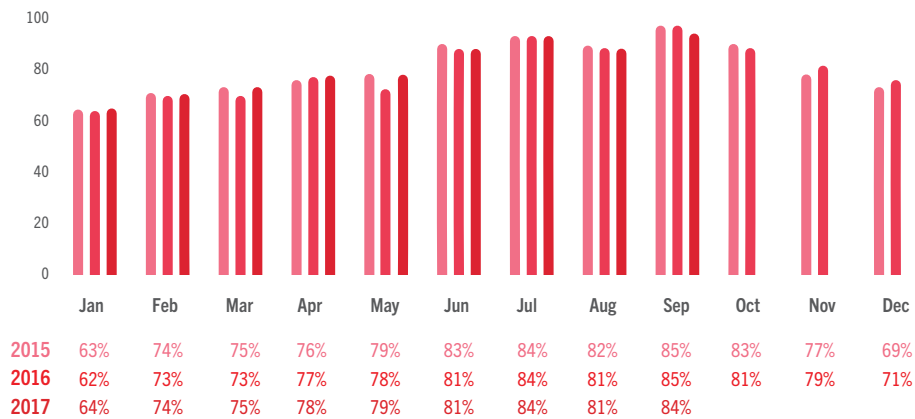
	2015	2016	2017
Room supply	1.2%	2.8%	2.5%
Room demand	1.8%	1.7%	1.6%

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

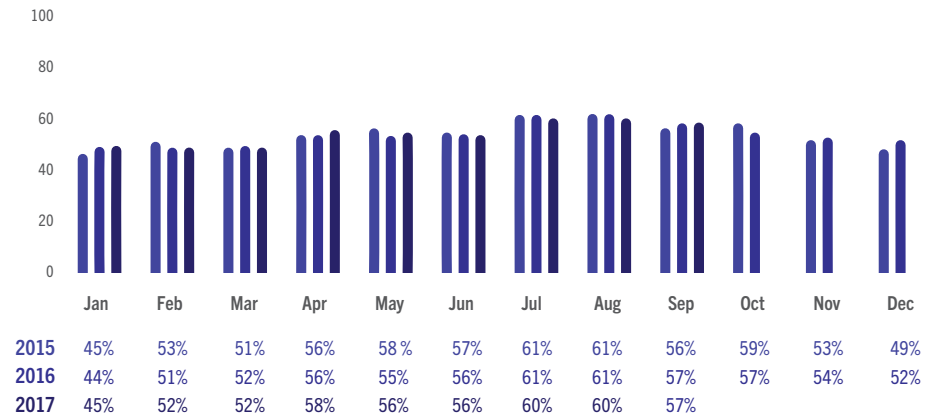


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - September 2017

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2015	2016	2017
Sept 2017	£98.92	£100.07	£102.04
Weekday	£100.13	£101.57	£104.12
Weekend	£95.73	£96.62	£97.93

RevPAR

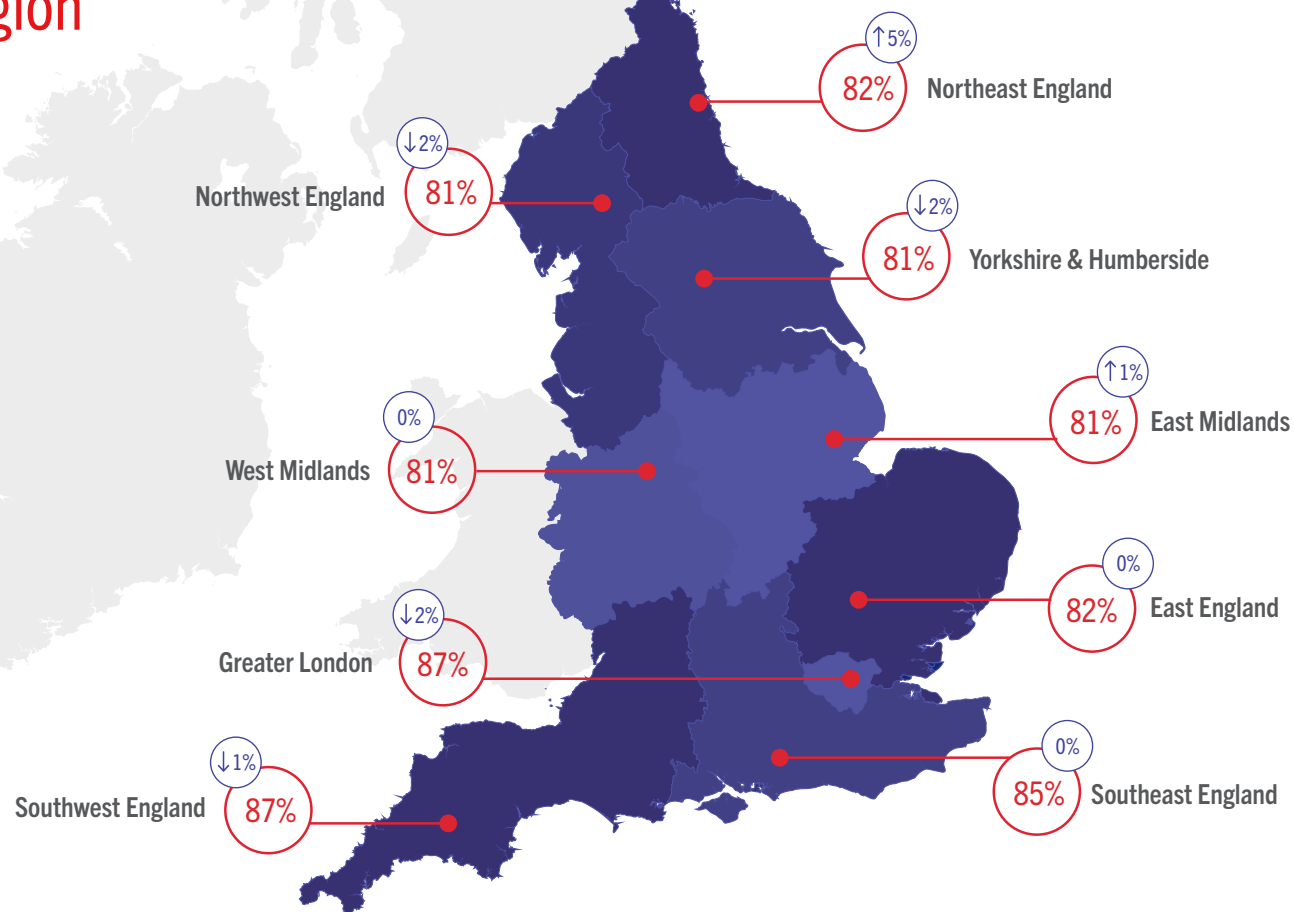
	2015	2016	2017
Sept 2017	£84.23	£84.94	£85.90
Weekday	£84.45	£85.56	£87.27
Weekend	£83.64	£83.45	£83.17



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

Room Occupancy	2015	2016	2017
East England	83%	83%	82%
East Midlands	80%	80%	81%
Greater London	89%	89%	87%
Northeast England	82%	78%	82%
Northwest England	82%	83%	81%
Southeast England	86%	85%	85%
Southwest England	88%	87%	87%
West Midlands	81%	82%	81%
Yorkshire & Humberside	83%	83%	81%

Bedspace Occupancy	2015	2016	2017
East England	55%	56%	56%
East Midlands	53%	54%	55%
Greater London	60%	61%	60%
Northeast England	54%	53%	56%
Northwest England	54%	56%	55%
Southeast England	57%	57%	58%
Southwest England	58%	58%	59%
West Midlands	52%	53%	53%
Yorkshire & Humberside	56%	57%	56%

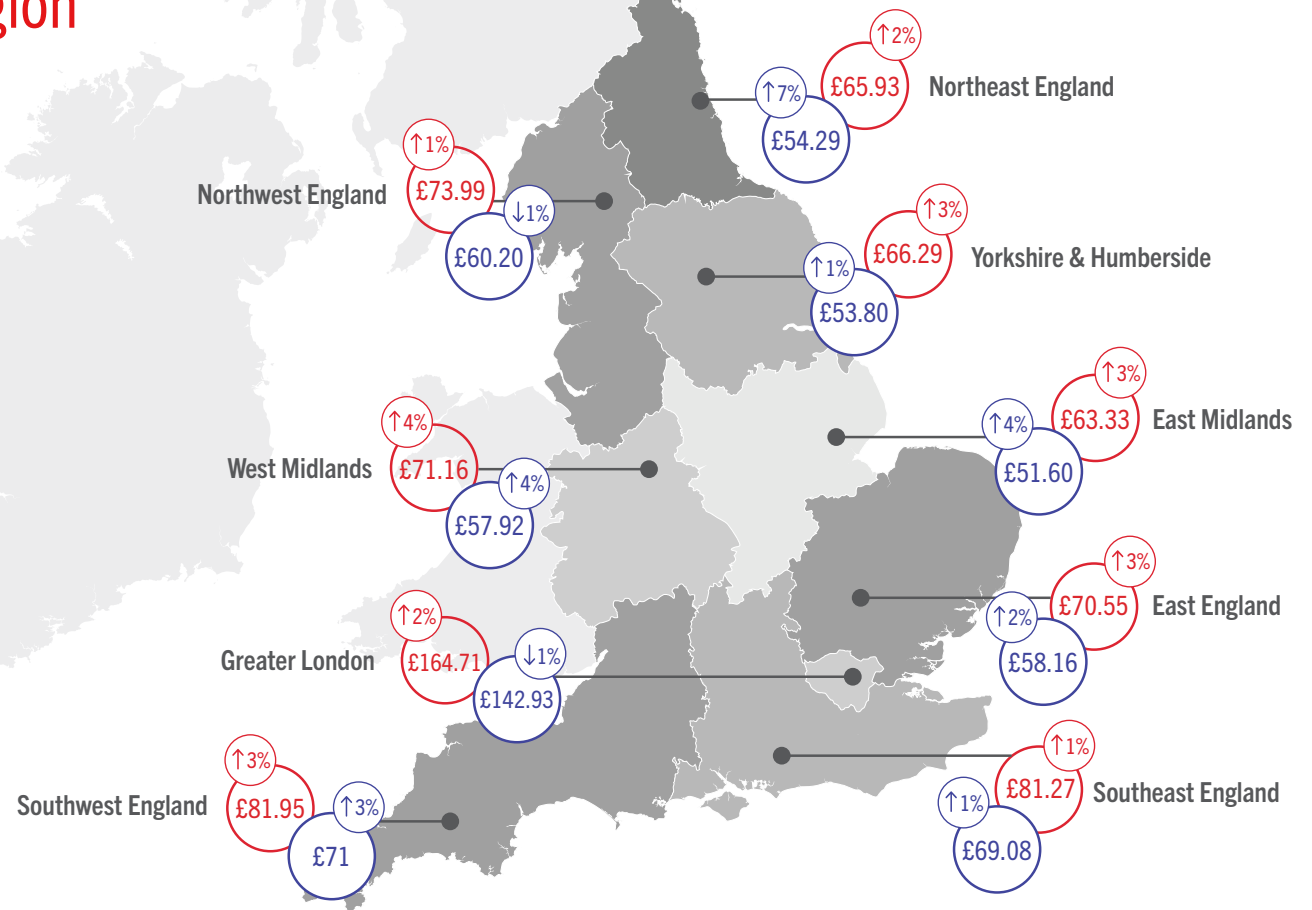


ADR and RevPAR By Region

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 ● RevPAR ⬆ % Change



ADR and RevPAR By Region

Data Tables - September 2017

ADR	2015	2016	2017
East England	£67.88	£68.66	£70.55
East Midlands	£59.46	£61.49	£63.33
Greater London	£161.91	£162.23	£164.71
Northeast England	£65.75	£64.60	£65.93
Northwest England	£68.54	£73.33	£73.99
Southeast England	£79.70	£80.86	£81.27
Southwest England	£77.72	£79.25	£81.95
West Midlands	£65.95	£68.43	£71.16
Yorkshire & Humberside	£61.93	£64.39	£66.29

RevPAR	2015	2016	2017
East England	£56.34	£56.76	£58.16
East Midlands	£47.70	£49.45	£51.60
Greater London	£144.23	£144.34	£142.93
Northeast England	£53.69	£50.54	£54.29
Northwest England	£56.05	£60.88	£60.20
Southeast England	£68.26	£68.42	£69.08
Southwest England	£68.19	£69.04	£71.00
West Midlands	£53.63	£55.78	£57.92
Yorkshire & Humberside	£51.16	£53.24	£53.80



Room Occupancy By Destination Type

At a glance - September 2017



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables - September 2017

Room Occupancy

	2015	2016	2017
City / Large Town	85%	85%	84%
Small Town	84%	83%	82%
Countryside	82%	81%	79%
Seaside	84%	85%	85%

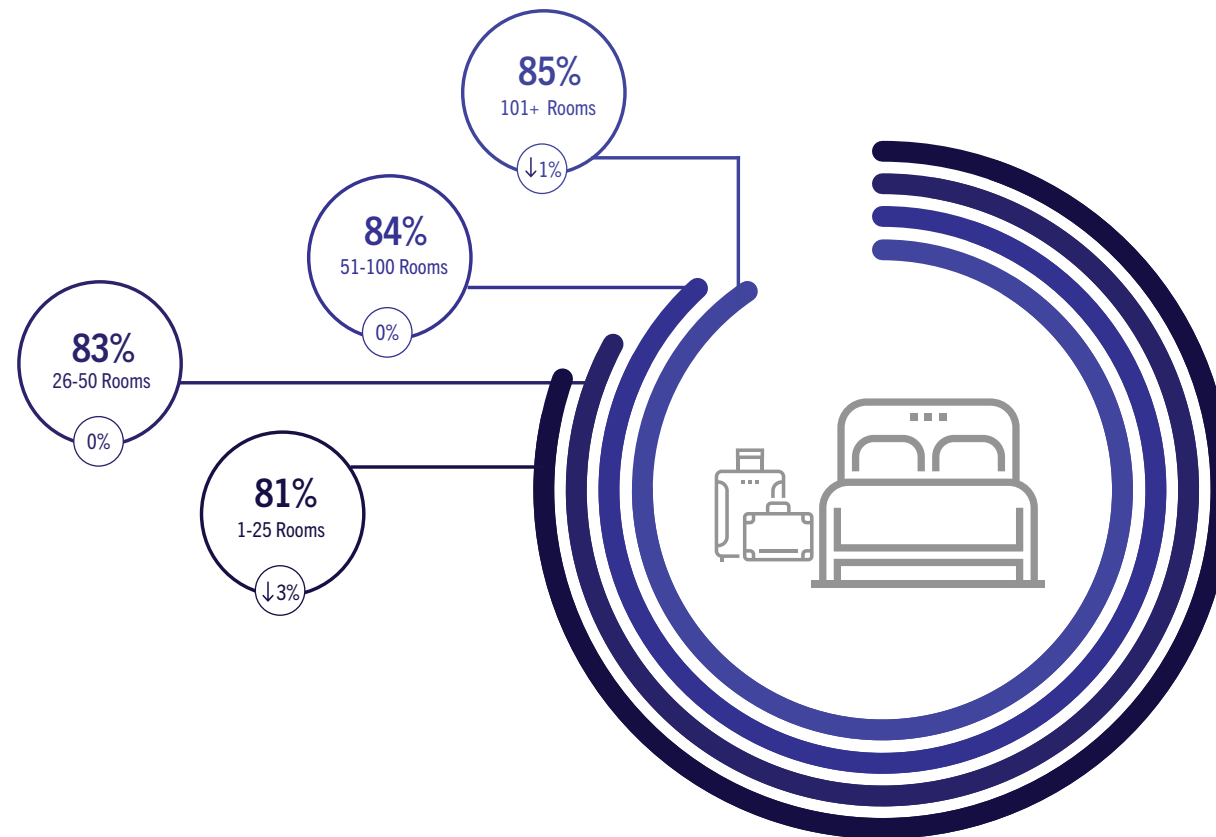
Bedspace Occupancy

	2015	2016	2017
City / Large Town	56%	57%	57%
Small Town	58%	57%	57%
Countryside	53%	53%	52%
Seaside	58%	61%	61%



Room Occupancy By Number of Rooms

At a glance - September 2017



Occupancy By Number of Rooms

Data Tables - September 2017

Room Occupancy	2015	2016	2017
1-25 Rooms	84%	83%	81%
26-50 Rooms	84%	83%	83%
51-100 Rooms	84%	84%	84%
101+ Rooms	86%	86%	85%

Bedspace Occupancy	2015	2016	2017
1-25 Rooms	57%	58%	56%
26-50 Rooms	57%	57%	58%
51-100 Rooms	58%	59%	59%
101+ Rooms	57%	57%	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.

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

Benchmarking
↑ **your world**