

England Occupancy Survey

October 2017 Results



Summary of Results

Room occupancy in October remained unchanged at 80%, whilst bedspace occupancy decreased by -1% when compared to September 2016 to 56%. The change in room occupancy was led by an increase in **room supply** of 2.2% compared to an increase of only 1.8% 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 by +2% in October to £77.22 compared to the previous year.

City/large town room occupancy decreased -1% to 81% whilst bedspace also decreased by -1% to 56%.

Seaside increased by +1% to 79% for room occupancy and remained unchanged at 59% for bedspace occupancy.

Small town room occupancy increased +1% to 77% and remained unchanged for bedspace occupancy at 55% for bedspace occupancy, with **countryside** occupancy decreasing by -3% for room occupancy to 71% while bedspace occupancy decreased -3% to 48%.

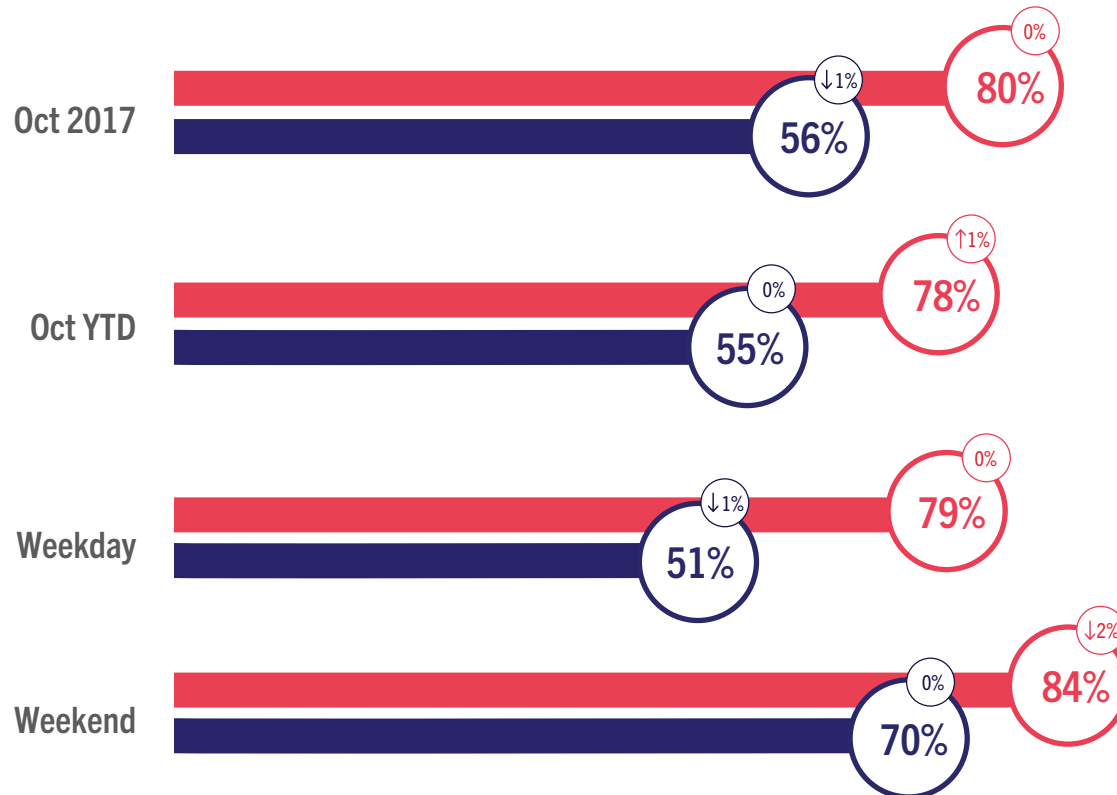
Looking at room and bedspace occupancy rates by **establishment size** all categories remained relatively unchanged with changes of 2% or less except for the establishment with 1-25 rooms which saw room occupancy decrease by -4% and bedspace occupancy decrease by -3%.

Looking at occupancy by **region**, the largest shift for room occupancy came from London and the North West with a -2% decrease. All other regions remained relatively unchanged with a 1% or less change. For bedspace occupancy, the largest shift also came for the North West which increased by -2%, but all other regions remained relatively unchanged with 1% or less change.

England Room and Bedspace Occupancy

At a glance - October 2017

● Room Space ● Bedspace ⓘ % Change



England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2015	2016	2017
Oct	83%	81%	80%
Oct YTD	79%	78%	78%
Weekday	82%	79%	79%
Weekend	84%	85%	84%

Bedspace Occupancy	2015	2016	2017
Oct	59%	57%	56%
Oct YTD	56%	55%	55%
Weekday	53%	52%	51%
Weekend	72%	71%	70%

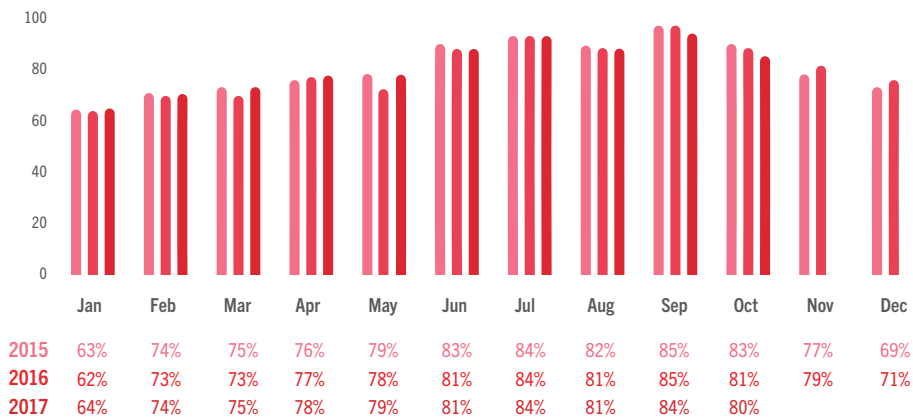
	2015	2016	2017
Room supply	0.9%	1.5%	2.2%
Room demand	2.1%	-0.8%	1.8%

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

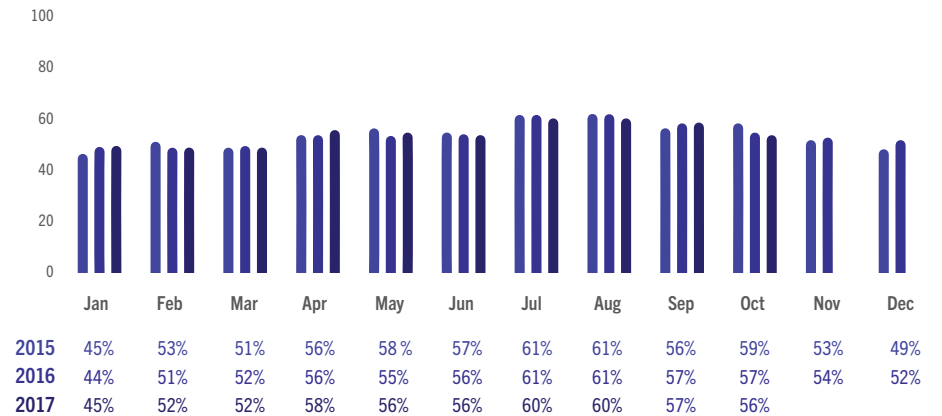


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - October 2017

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2015	2016	2017
Oct	£97.77	£94.12	£95.95
Weekday	£97.99	£94.61	£96.95
Weekend	£97.33	£93.01	£93.24

RevPAR

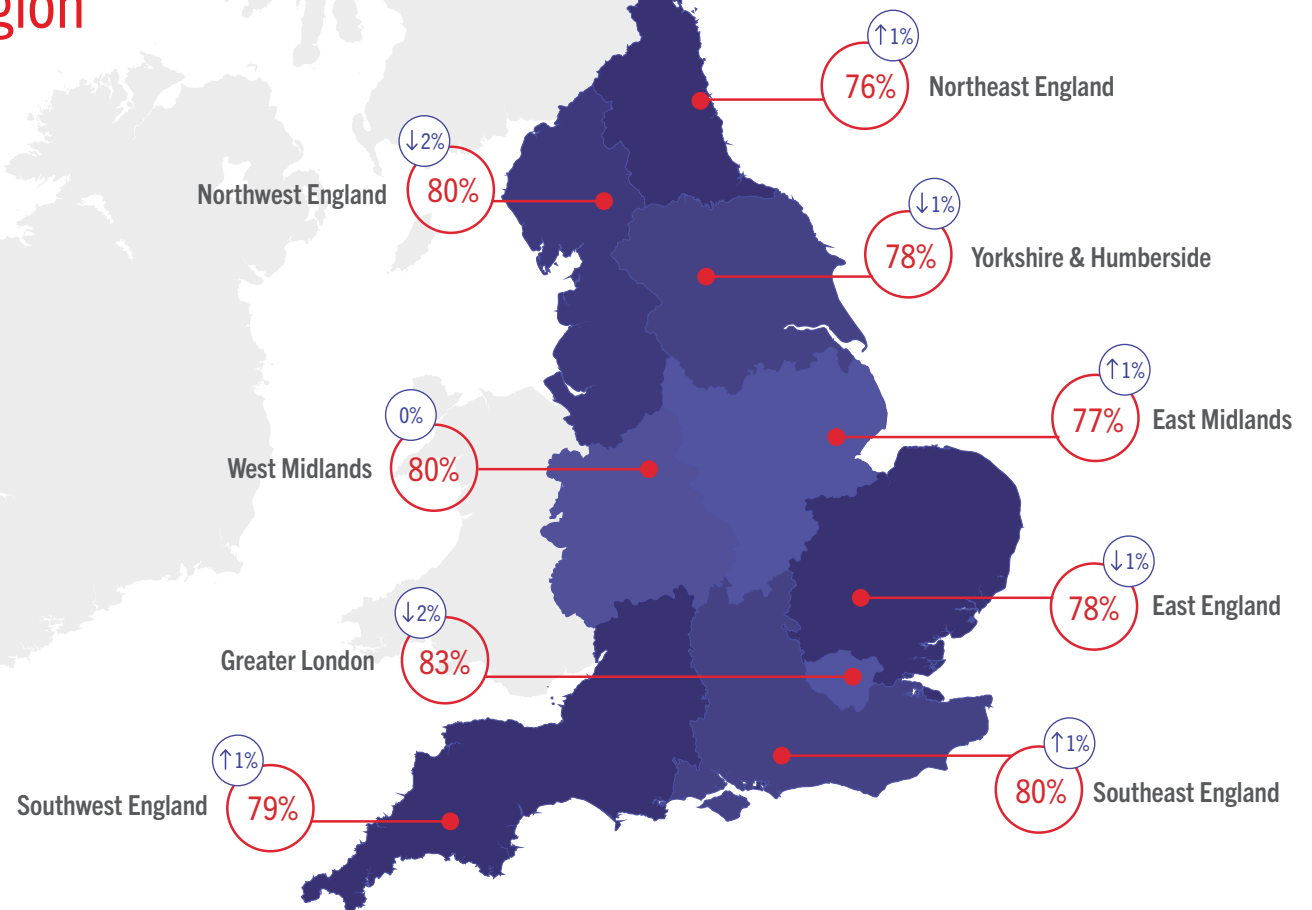
	2015	2016	2017
Oct	£80.88	£76.06	£77.22
Weekday	£80.29	£74.77	£76.92
Weekend	£82.12	£79.23	£78.08



Room Occupancy By Region

At a glance - October 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 - October 2017

Room Occupancy	2015	2016	2017
East England	80%	79%	78%
East Midlands	78%	76%	77%
Greater London	88%	85%	83%
Northeast England	80%	76%	76%
Northwest England	82%	82%	80%
Southeast England	81%	79%	80%
Southwest England	81%	79%	79%
West Midlands	79%	79%	80%
Yorkshire & Humberside	80%	79%	78%

Bedspace Occupancy	2015	2016	2017
East England	57%	56%	55%
East Midlands	56%	54%	54%
Greater London	64%	61%	60%
Northeast England	57%	53%	53%
Northwest England	59%	58%	56%
Southeast England	57%	56%	56%
Southwest England	57%	55%	55%
West Midlands	54%	54%	53%
Yorkshire & Humberside	58%	56%	55%

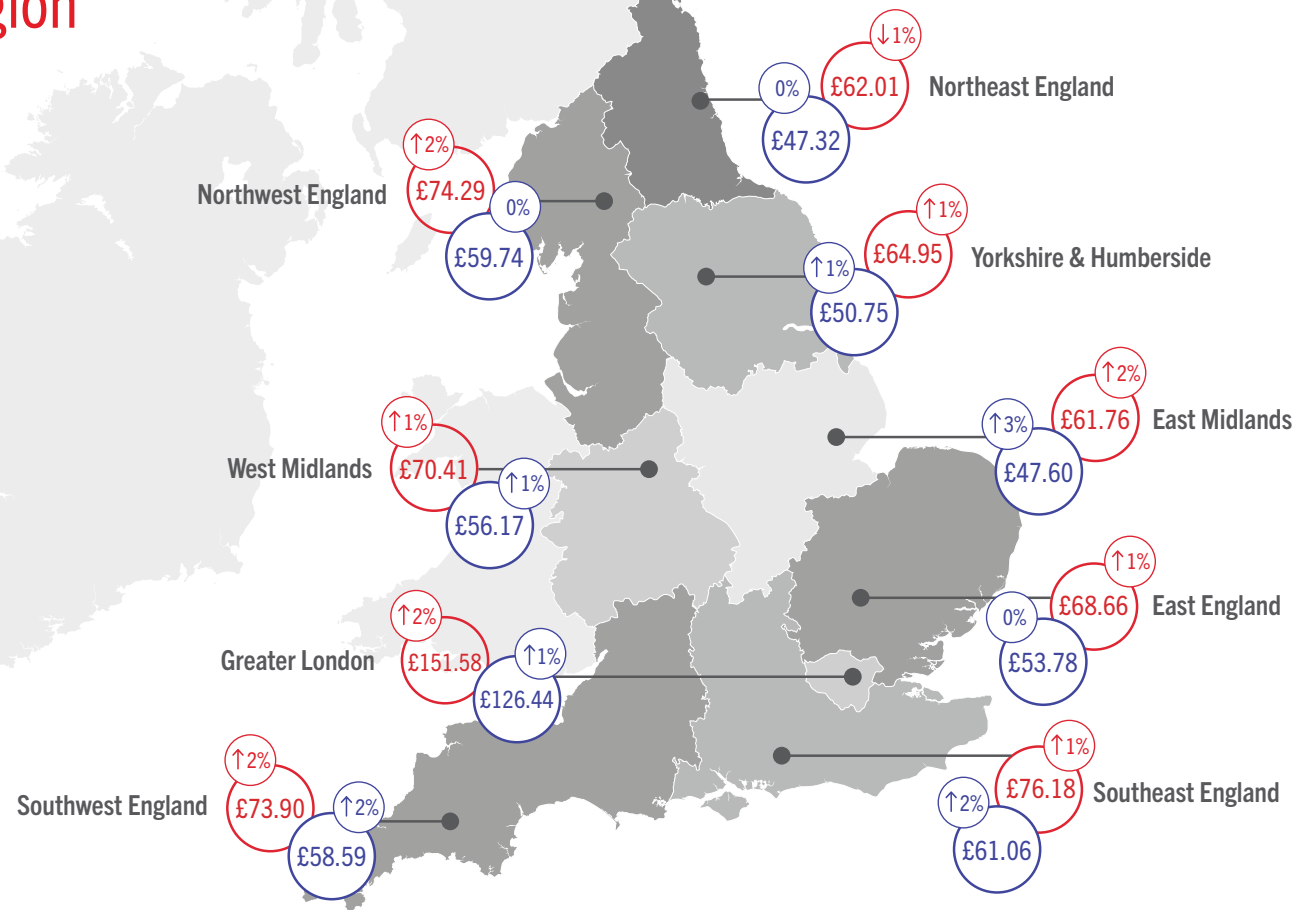


ADR and RevPAR By Region

At a glance - October 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 - October 2017

ADR	2015	2016	2017
East England	£66.47	£67.90	£68.66
East Midlands	£58.79	£60.69	£61.76
Greater London	£160.39	£147.90	£151.58
Northeast England	£71.04	£62.72	£62.01
Northwest England	£70.51	£72.55	£74.29
Southeast England	£75.00	£75.62	£76.18
Southwest England	£71.87	£72.73	£73.90
West Midlands	£63.99	£69.74	£70.41
Yorkshire & Humberside	£61.40	£64.10	£64.95

RevPAR	2015	2016	2017
East England	£53.22	£53.71	£53.78
East Midlands	£45.86	£46.13	£47.60
Greater London	£141.84	£125.66	£126.44
Northeast England	£56.56	£47.47	£47.32
Northwest England	£57.97	£59.48	£59.74
Southeast England	£60.66	£59.74	£61.06
Southwest England	£57.95	£57.33	£58.59
West Midlands	£50.24	£55.36	£56.17
Yorkshire & Humberside	£49.16	£50.45	£50.75



Room Occupancy By Destination Type

At a glance - October 2017



Countryside



Seaside



Small Town



City / Large Town



Occupancy By Location Type

Data Tables - October 2017

Room Occupancy

	2015	2016	2017
City / Large Town	84%	82%	81%
Small Town	78%	76%	77%
Countryside	78%	74%	71%
Seaside	79%	78%	79%

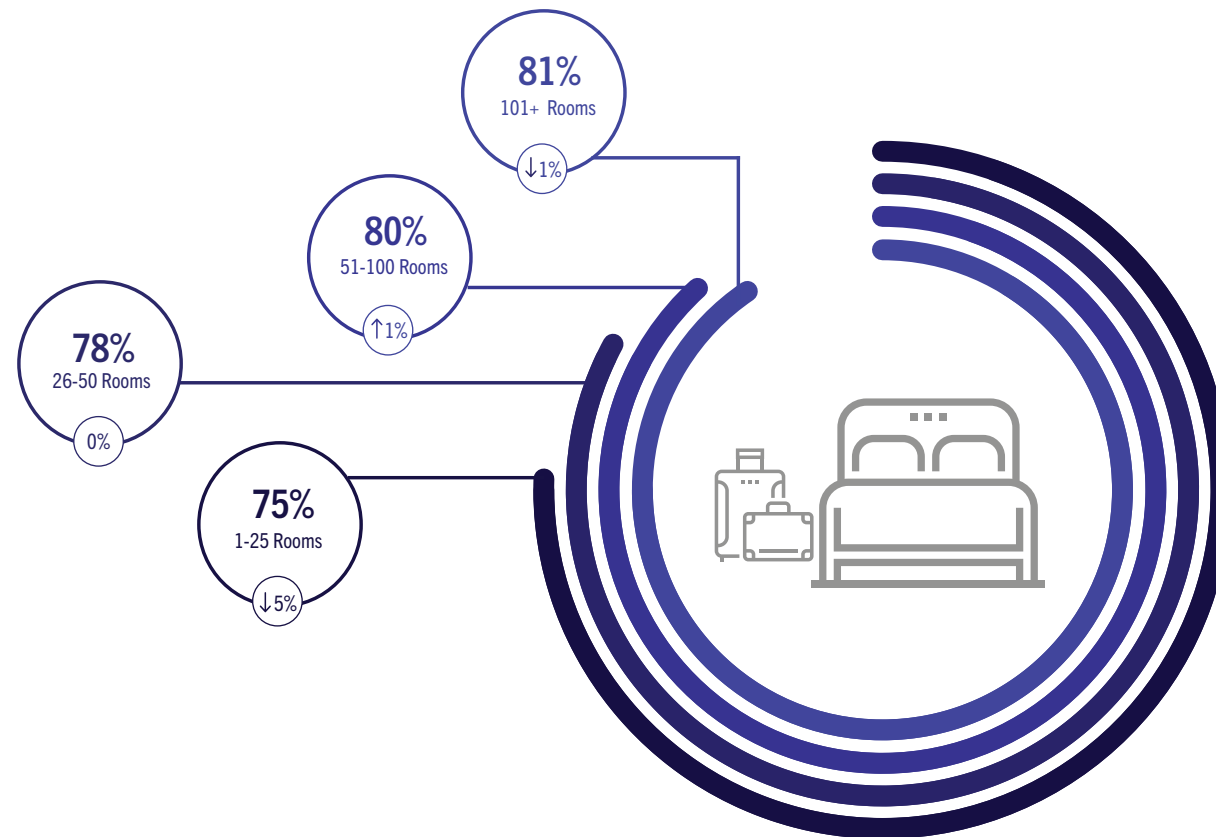
Bedspace Occupancy

	2015	2016	2017
City / Large Town	59%	57%	56%
Small Town	57%	55%	55%
Countryside	54%	51%	48%
Seaside	60%	59%	59%



Room Occupancy By Number of Rooms

At a glance - October 2017





Occupancy By Number of Rooms

Data Tables - October 2017

Room Occupancy

	2015	2016	2017
1-25 Rooms	79%	79%	75%
26-50 Rooms	80%	78%	78%
51-100 Rooms	81%	79%	80%
101+ Rooms	84%	82%	81%

Bedspace Occupancy

	2015	2016	2017
1-25 Rooms	58%	57%	54%
26-50 Rooms	58%	56%	56%
51-100 Rooms	60%	58%	58%
101+ Rooms	59%	57%	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.

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:

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