

England Occupancy Survey

October 2019 Results



Summary of Results

Room occupancy decreased -1% in October at 82%, bedspace occupancy remained level +0% compared to September 2018 at 58%. In October 2019, there was an increase of +2.0% in room supply and an increase of +0.9% 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, decreased by -2% in October compared to the previous year at £81.57.

Looking at **destination type**, Countryside room occupancy increased by +3% to 73% and bedspace occupancy increased by +5% to 53% in October 2019. Seaside establishments saw an increase of +1% in room occupancy to 80% and increased +4% in bedspace occupancy at 63%. City/Large town establishments decreased -1% in room occupancy to 83% and remained level at 58% for bed space occupancy. Small town room occupancy decreased -1% to 77%, while bedspace occupancy increased +2% to 58%.

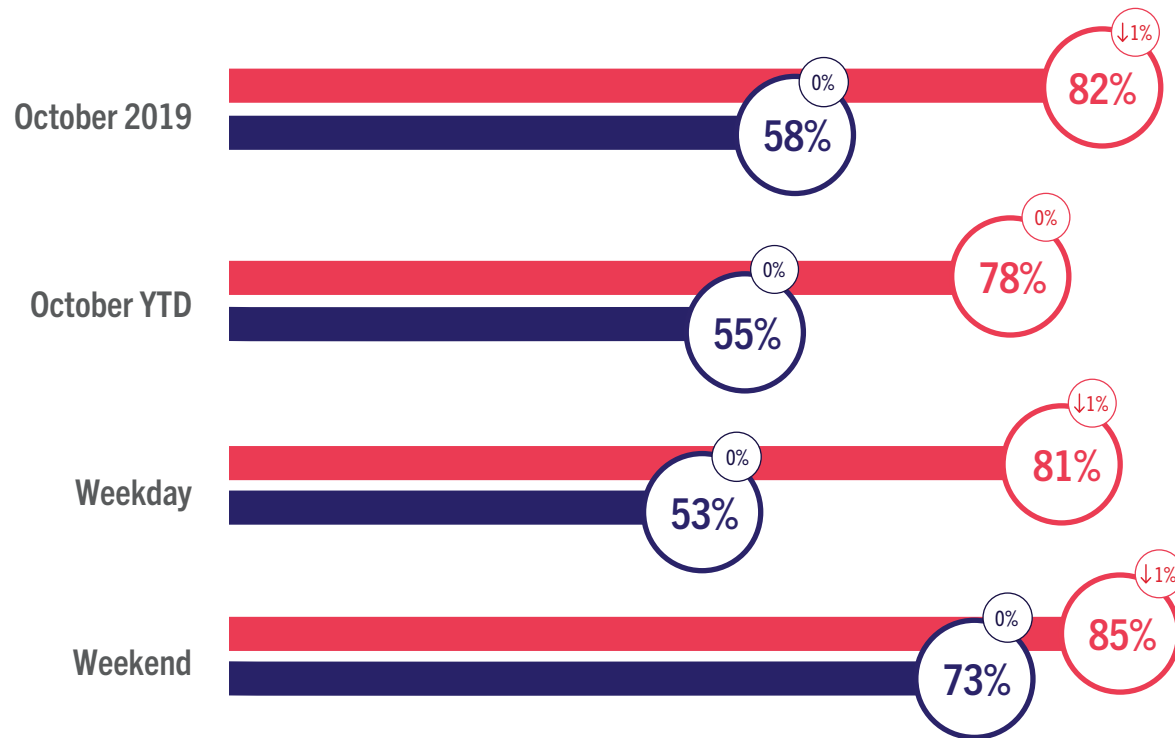
Looking at occupancy by **establishment size**, establishments with 1-25 rooms saw the greatest increase in room occupancy, up +3% at 80%, while bedspace increased +3% to 59%. Room occupancy for establishment sizes with 26-50 rooms increased +1% compared to the same period 2018 at 79%, while bedspace increased +2% to 58%. Establishments of 51-100 rooms remained level in bed space occupancy at 81%, establishments of 101+ rooms saw a decline in roomspace by -1% to 83%.

Looking at room occupancy by **region**, Yorkshire and Humberside was the only region which increased compared the same month last year, up +2% to 80%, while bedspace occupancy increased +3% to 58%. South West and South East regions remained at level room occupancy at 80% and 79% respectively. East of England, West Midlands and North East regions saw a decline of -1% to 80%, 79% & 76%. Greater London, Northwest England and East Midlands all declined -2% in roomspace occupancy to 88%, 81% & 77% respectively.

England Room and Bedspace Occupancy

At a glance - October 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
October	80%	83%	82%
October YTD	78%	79%	78%
Weekday	79%	82%	81%
Weekend	84%	86%	85%

Bedspace Occupancy	2017	2018	2019
October	56%	58%	58%
October YTD	55%	56%	55%
Weekday	51%	53%	53%
Weekend	70%	73%	73%

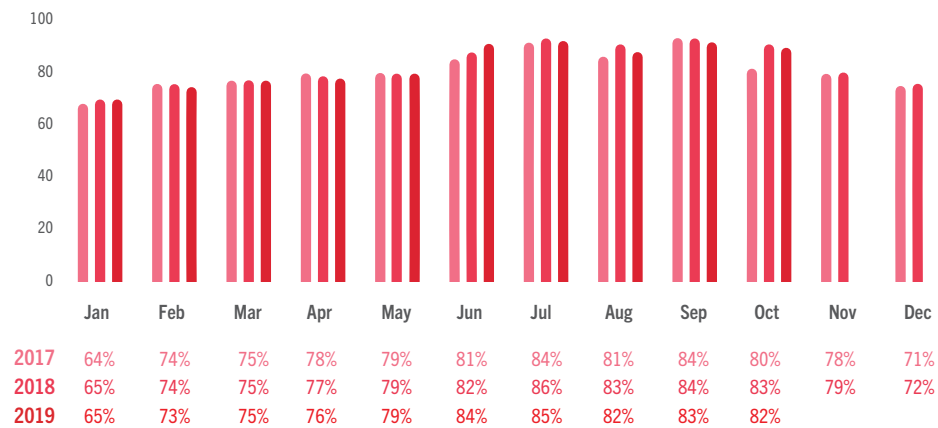
	2017	2018	2019
Room supply	2.0%	1.8%	2.0%
Room demand	1.4%	5.1%	0.9%

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

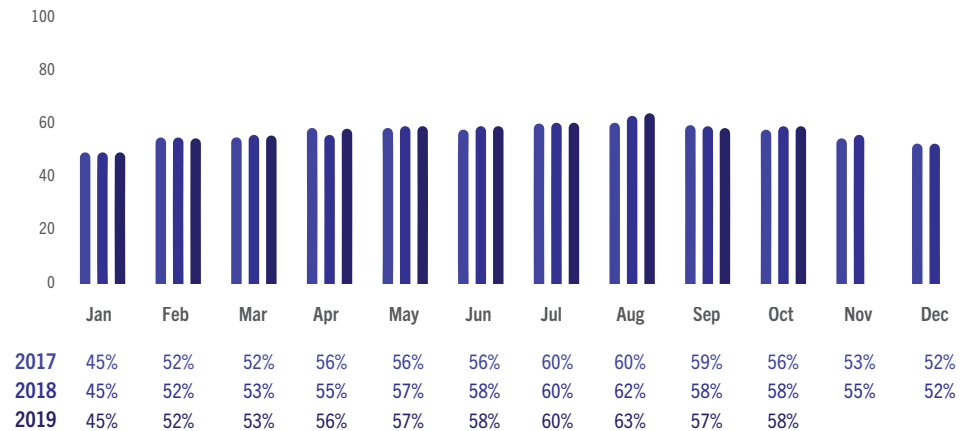


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



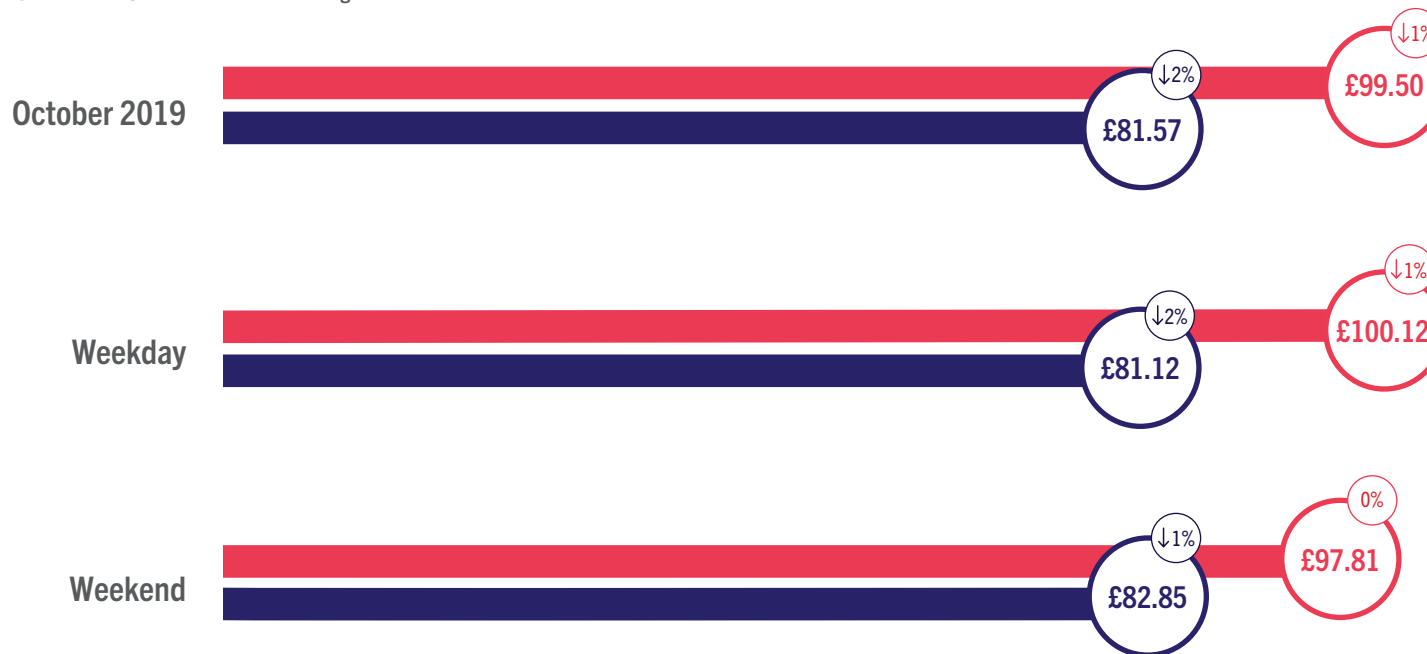
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - October 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
October	£95.58	£100.48	£99.50
Weekday	£96.49	£101.46	£100.12
Weekend	£93.09	£97.80	£97.81

RevPAR

	2017	2018	2019
October	£76.69	£83.28	£81.57
Weekday	£76.31	£83.01	£81.12
Weekend	£77.77	£84.06	£82.85

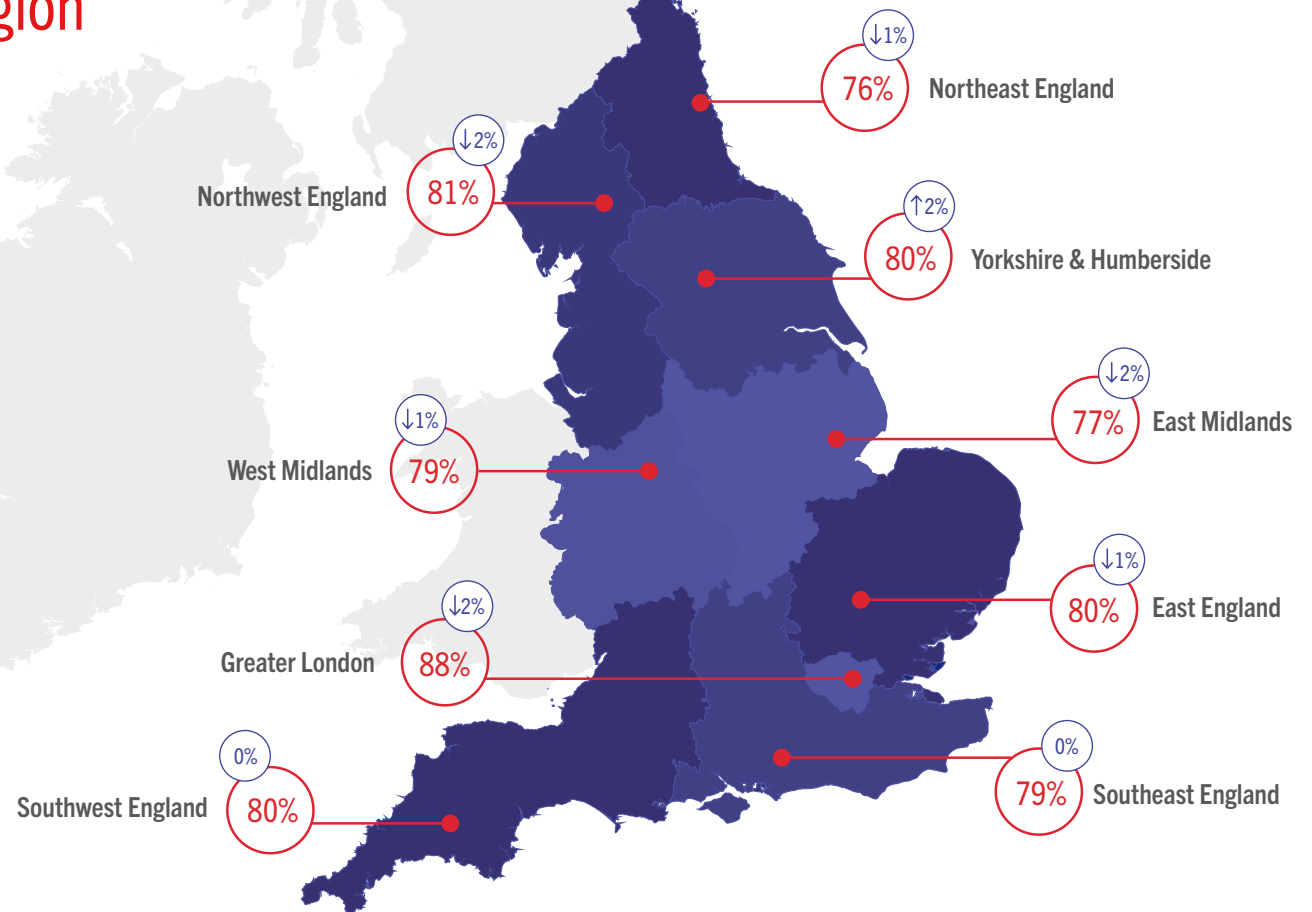


Room Occupancy By Region

At a glance - October 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	78%	81%	80%
East Midlands	77%	79%	77%
Greater London	84%	89%	88%
Northeast England	76%	77%	76%
Northwest England	80%	83%	81%
Southeast England	80%	80%	79%
Southwest England	79%	80%	80%
West Midlands	80%	80%	79%
Yorkshire & Humberside	78%	77%	80%

Bedspace Occupancy	2017	2018	2019
East England	54%	57%	57%
East Midlands	53%	55%	55%
Greater London	60%	64%	63%
Northeast England	53%	54%	56%
Northwest England	56%	58%	57%
Southeast England	55%	56%	58%
Southwest England	54%	55%	59%
West Midlands	53%	53%	53%
Yorkshire & Humberside	55%	55%	58%

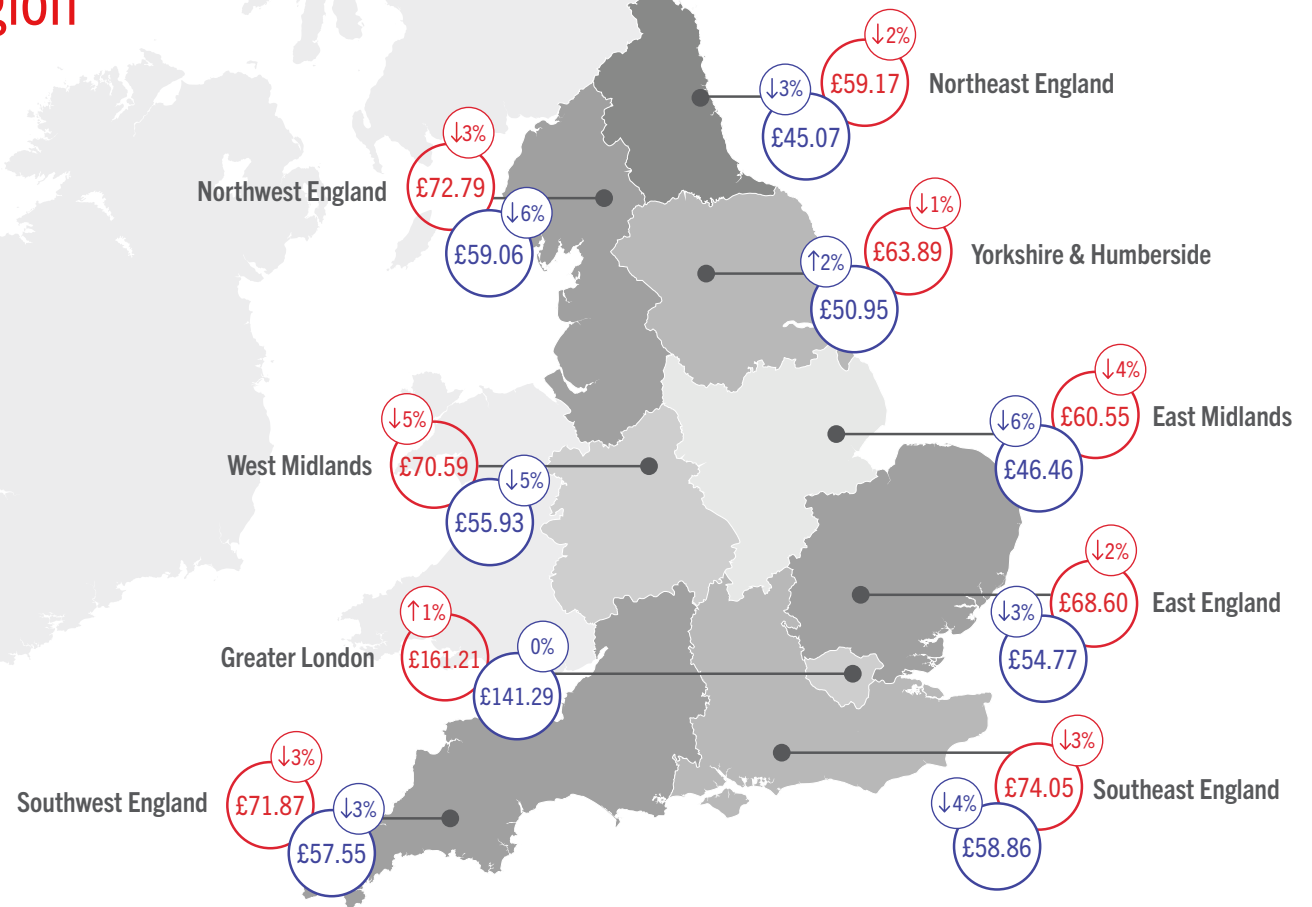


ADR and RevPAR By Region

At a glance - October 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	£68.94	£69.97	£68.60
East Midlands	£61.75	£62.92	£60.55
Greater London	£149.97	£158.98	£161.21
Northeast England	£62.05	£60.32	£59.17
Northwest England	£74.54	£75.39	£72.79
Southeast England	£75.95	£76.66	£74.05
Southwest England	£74.24	£74.07	£71.87
West Midlands	£70.14	£74.00	£70.59
Yorkshire & Humberside	£65.00	£64.44	£63.89

RevPAR

	2017	2018	2019
East England	£53.48	£56.39	£54.77
East Midlands	£47.46	£49.43	£46.46
Greater London	£125.30	£141.85	£141.29
Northeast England	£47.39	£46.50	£45.07
Northwest England	£59.83	£62.59	£59.06
Southeast England	£60.39	£61.29	£58.86
Southwest England	£58.46	£59.52	£57.55
West Midlands	£55.79	£59.15	£55.93
Yorkshire & Humberside	£50.56	£49.92	£50.95



Room Occupancy By Destination Type

At a glance - October 2019



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	81%	84%	83%
Small Town	76%	78%	77%
Countryside	70%	70%	73%
Seaside	78%	79%	80%

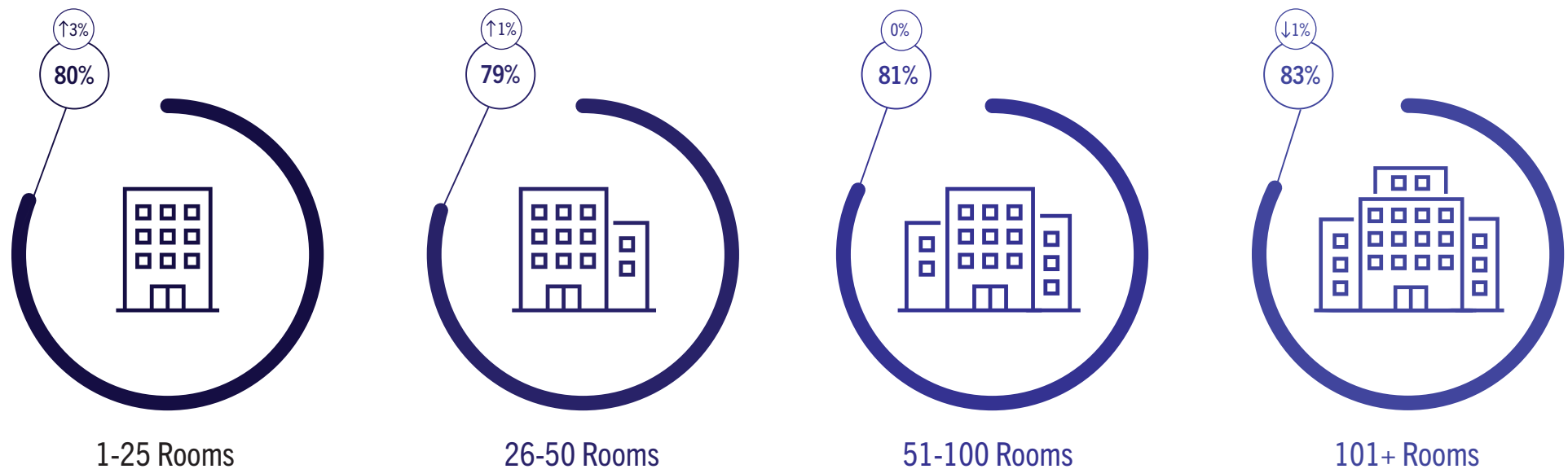
Bedspace Occupancy

	2017	2018	2019
City / Large Town	56%	58%	58%
Small Town	55%	56%	58%
Countryside	48%	48%	53%
Seaside	58%	59%	63%



Room Occupancy By Number of Rooms

At a glance - October 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	75%	77%	80%
26-50 Rooms	77%	79%	79%
51-100 Rooms	79%	81%	81%
101+ Rooms	81%	84%	83%

Bedspace Occupancy

	2017	2018	2019
1-25 Rooms	54%	56%	59%
26-50 Rooms	55%	56%	58%
51-100 Rooms	58%	59%	60%
101+ Rooms	56%	58%	58%



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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