

England Occupancy Survey

March 2019 Results



Summary of Results

Room occupancy in March remained level at 75% whereas bedspace occupancy, at 52%, fell by -1% when compared to March 2018. In March 2019 there was an increase of +2.3% 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, was at a similar level in March compared to the previous year at £67.51.

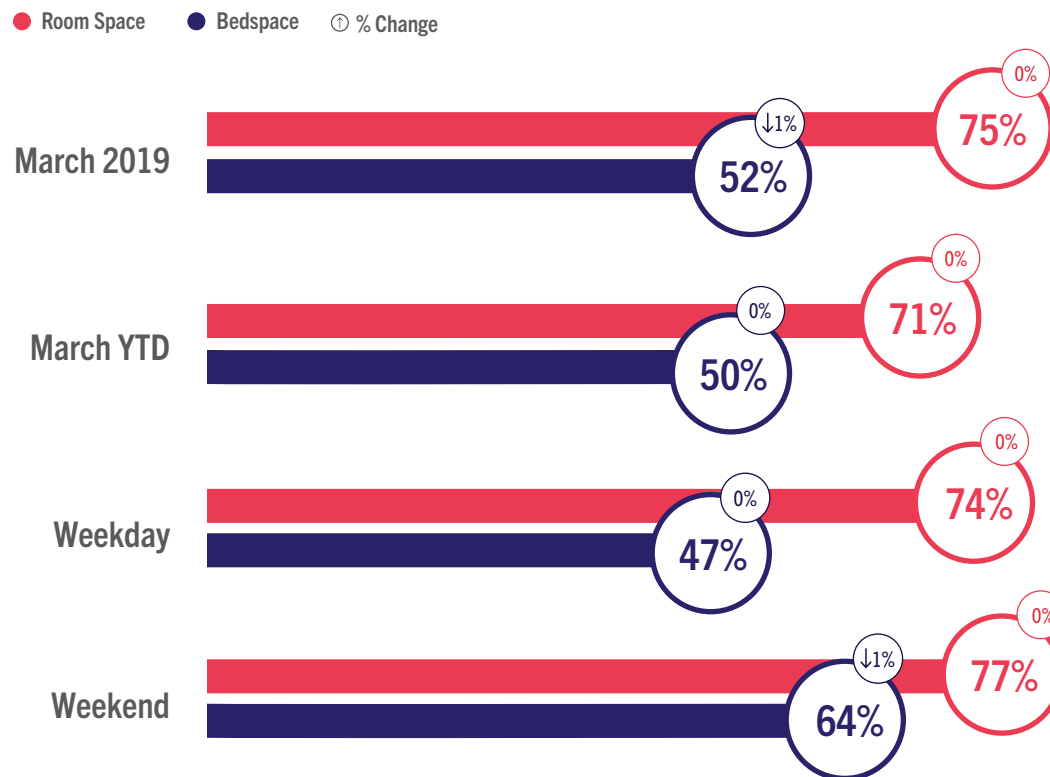
City/large town room occupancy remained level at 76% whilst bedspace occupancy decreased by -1% at 53%. **Seaside** room remained unchanged from 2018, at 69%, bedspace occupancy decreased by -1% to 50%. **Small town** room occupancy remained unchanged at 69%, bedspace occupancy remained level at 50%. **Countryside** room occupancy increased by +1% to 64% and bedspace occupancy remained level at 44%.

Looking at occupancy rates by **establishment size**, establishments with 1 - 25 rooms showed greatest percentage increase in room occupancy, increasing by of +3% to 71% compared to March 2018 and increasing bedspace occupancy by +2% to 51%. Establishments with 26-50 rooms saw an increase of +1% in room occupancy to 72%, but saw a fall of -1% in bedspace occupancy to 51%. All other establishment sizes remained at a similar level in roomspace occupancy levels when compared to March 2018.

Looking at occupancy rates by **region**, the biggest increase came from Yorkshire & Humberside, increasing room occupancy by +3% to 72%, with a +1% increase in bedspace occupancy. Greater London saw a +2% increase in room occupancy to 81%, also showing a +1% increase in bedspace occupancy compared to the March 2018. East Midlands and Southwest England saw an increase in room occupancy of +1%. All other regions were at a similar level or decreased in room occupancy in March 2019, ranging from a 0% to -3% change compared to March 2018.

England Room and Bedspace Occupancy

At a glance - March 2019



*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
March	75%	75%	75%
March YTD	71%	71%	71%
Weekday	74%	74%	74%
Weekend	76%	76%	77%

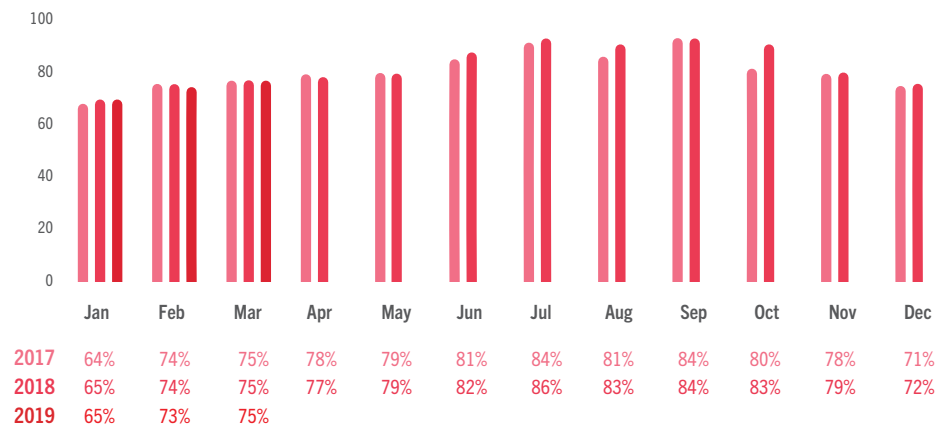
Bedspace Occupancy	2017	2018	2019
March	52%	53%	52%
March YTD	49%	50%	50%
Weekday	47%	47%	47%
Weekend	64%	65%	64%

	2017	2018	2019
Room supply	1.6%	1.5%	2.3%
Room demand	4.2%	1.5%	2.4%

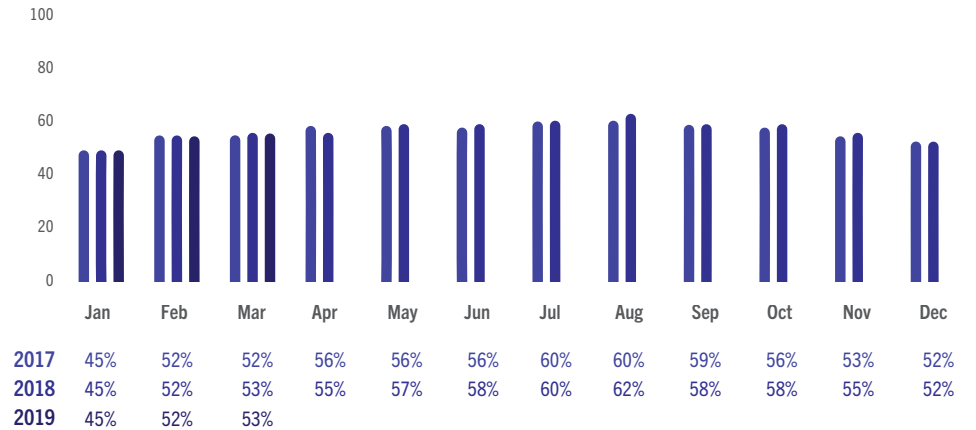
Table to the left shows the room supply and room demand year on year relative percentage change.

England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - March 2019

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2017	2018	2019
March	£89.86	£90.38	£90.23
Weekday	£91.23	£91.78	£92.23
Weekend	£86.58	£87.51	£86.16

RevPAR

	2017	2018	2019
March	£67.18	£67.55	£67.51
Weekday	£67.82	£67.98	£68.22
Weekend	£65.63	£66.65	£66.03

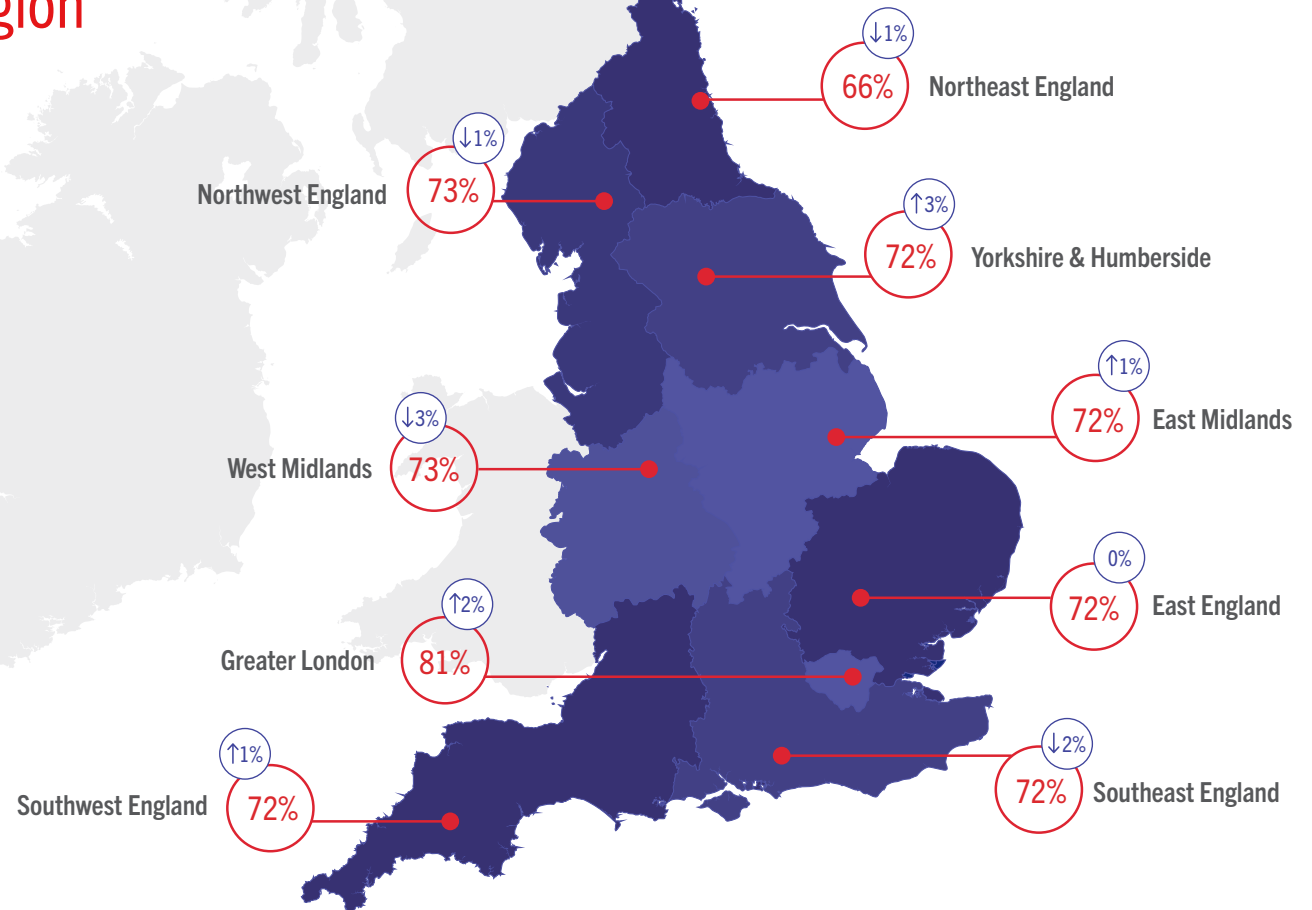


Room Occupancy By Region

At a glance - March 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	72%	72%	72%
East Midlands	71%	70%	72%
Greater London	81%	80%	81%
Northeast England	67%	67%	66%
Northwest England	73%	74%	73%
Southeast England	73%	73%	72%
Southwest England	71%	71%	72%
West Midlands	75%	76%	73%
Yorkshire & Humberside	72%	69%	72%

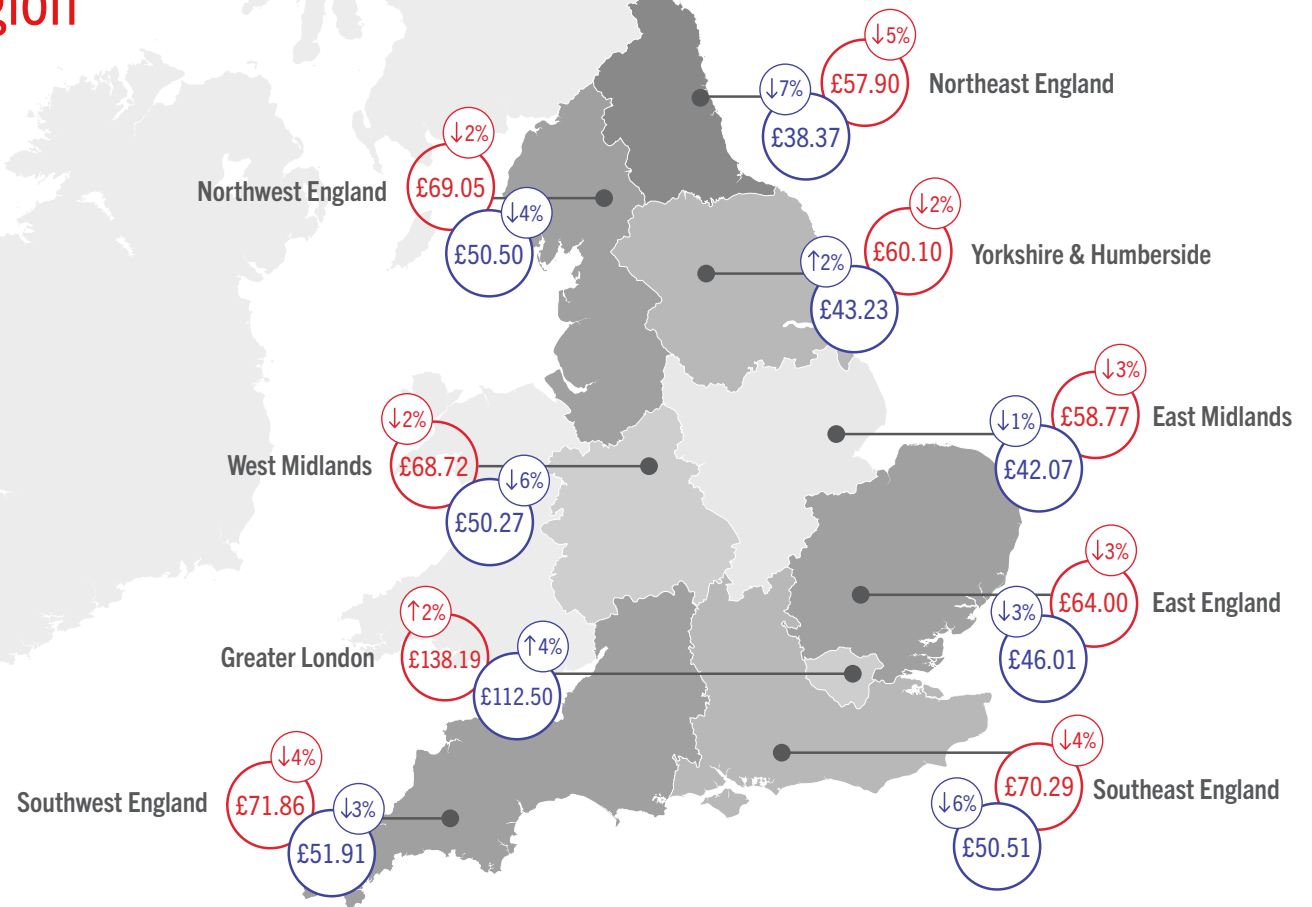
Bedspace Occupancy	2017	2018	2019
East England	50%	51%	51%
East Midlands	49%	50%	50%
Greater London	57%	57%	58%
Northeast England	47%	48%	47%
Northwest England	51%	53%	51%
Southeast England	50%	52%	50%
Southwest England	49%	50%	50%
West Midlands	50%	52%	49%
Yorkshire & Humberside	51%	50%	51%

ADR and RevPAR By Region

At a glance - March 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	£65.01	£65.91	£64.00
East Midlands	£59.37	£60.38	£58.77
Greater London	£138.69	£135.83	£138.19
Northeast England	£59.78	£61.15	£57.90
Northwest England	£67.73	£70.65	£69.05
Southeast England	£72.24	£72.93	£70.29
Southwest England	£71.30	£75.11	£71.86
West Midlands	£66.76	£70.19	£68.72
Yorkshire & Humberside	£60.18	£61.02	£60.10

RevPAR	2017	2018	2019
East England	£47.11	£47.25	£46.01
East Midlands	£42.08	£42.44	£42.07
Greater London	£111.66	£108.51	£112.50
Northeast England	£40.09	£41.23	£38.37
Northwest England	£49.51	£52.50	£50.50
Southeast England	£52.43	£53.56	£50.51
Southwest England	£50.82	£53.56	£51.91
West Midlands	£49.94	£53.40	£50.27
Yorkshire & Humberside	£43.59	£42.25	£43.23



Room Occupancy By Destination Type

At a glance - March 2019



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2017	2018	2019
City / Large Town	76%	76%	76%
Small Town	69%	69%	69%
Countryside	65%	64%	64%
Seaside	69%	68%	69%

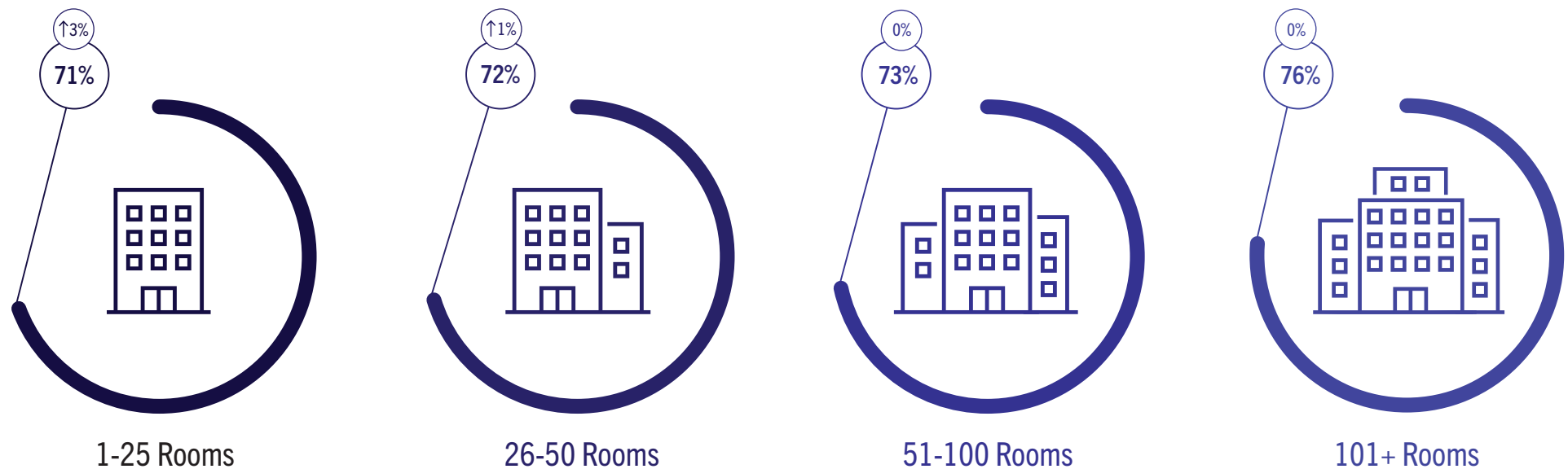
Bedspace Occupancy

	2017	2018	2019
City / Large Town	52%	54%	53%
Small Town	49%	50%	50%
Countryside	44%	44%	44%
Seaside	50%	51%	50%



Room Occupancy By Number of Rooms

At a glance - March 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	72%	68%	71%
26-50 Rooms	72%	71%	72%
51-100 Rooms	73%	73%	73%
101+ Rooms	76%	76%	76%

Bedspace Occupancy	2017	2018	2019
1-25 Rooms	51%	49%	51%
26-50 Rooms	51%	52%	51%
51-100 Rooms	53%	54%	53%
101+ Rooms	52%	54%	53%



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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