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England Occupancy Survey

May 2018 Results

Summary of Results

Room occupancy in May remained unchanged at 79%, whilst bedspace occupancy increased by +2% when compared to May 2017 at 57%. The change in room occupancy was led by an increase in **room supply** of 1.3% compared to an increase of 1.6% in **demand** compared to the same month in 2017.

RevPar, which is the total room revenue divided by the total number of available rooms, decreased by 1% in May to £94.92 compared to the previous year.

City/large town room occupancy remained unchanged 80% whilst bedspace occupancy increased by 1% to 56%. **Seaside** increased by 3% to 80% for room occupancy and 4% to 61% for bedspace occupancy.

Small town room occupancy increased 1% to 77% and 2% to 56% for bedspace occupancy, with **countryside** increasing 2% for room occupancy to 73% while bedspace occupancy increased 2% to 51%.

Looking at room occupancy rates by **establishment size** most categories remained relatively unchanged. For bedspace, all categories remained relatively unchanged with changes of 1% or less.

Looking at occupancy by **region**, all categories remained relatively unchanged with changes of 2% or less for both room occupancy and bedspace occupancy.

England Room and Bedspace Occupancy

At a glance - May 2018

● Room Space ● Bedspace ↑ % Change

May 2018
- 79% (0%)
- 57% (↑2%)

May YTD
- 74% (0%)
- 52% (0%)

Weekday
- 78% (0%)
- 50% (↑1%)
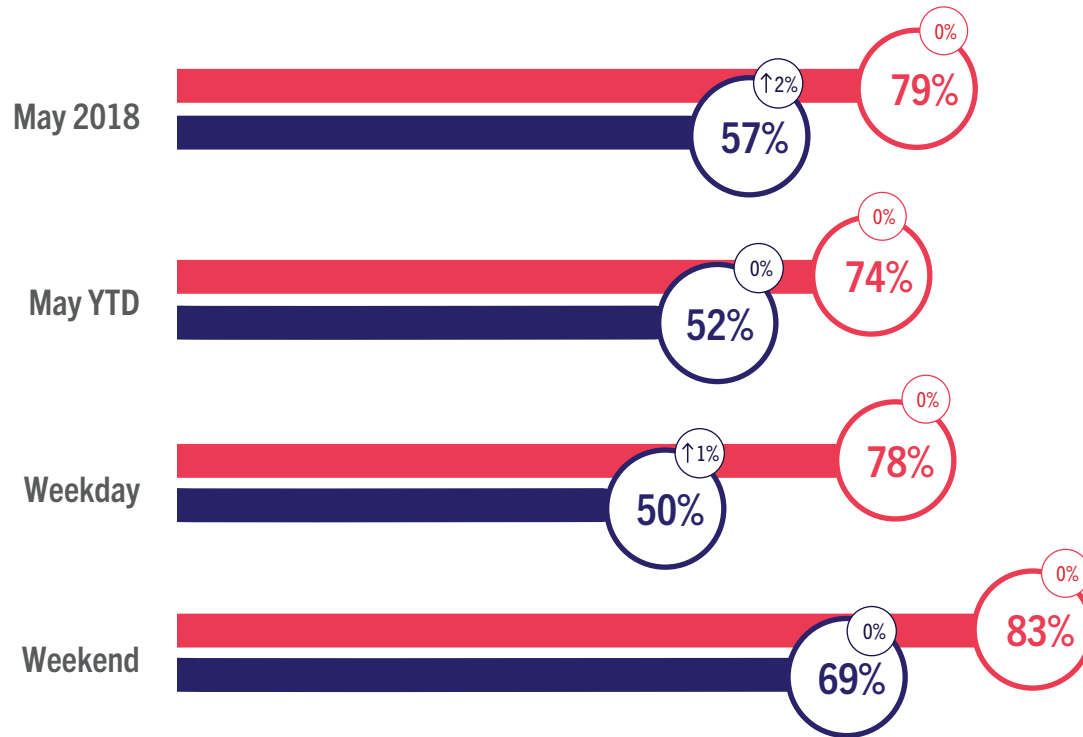
Weekend
- 83% (0%)
- 69% (0%)

England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2016	2017	2018
May	78%	79%	79%
May YTD	73%	74%	74%
Weekday	76%	78%	78%
Weekend	82%	82%	83%

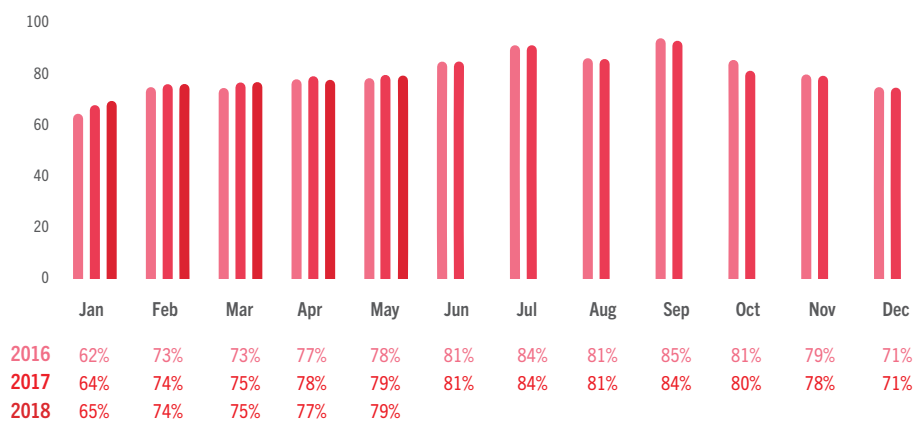| Bedspace Occupancy	2016	2017	2018
May	55%	56%	57%
May YTD	52%	52%	52%
Weekday	49%	50%	50%
Weekend	67%	68%	69%

	2016	2017	2018
Room supply	1.4%	1.8%	1.3%
Room demand	-0.5%	3.9%	1.6%

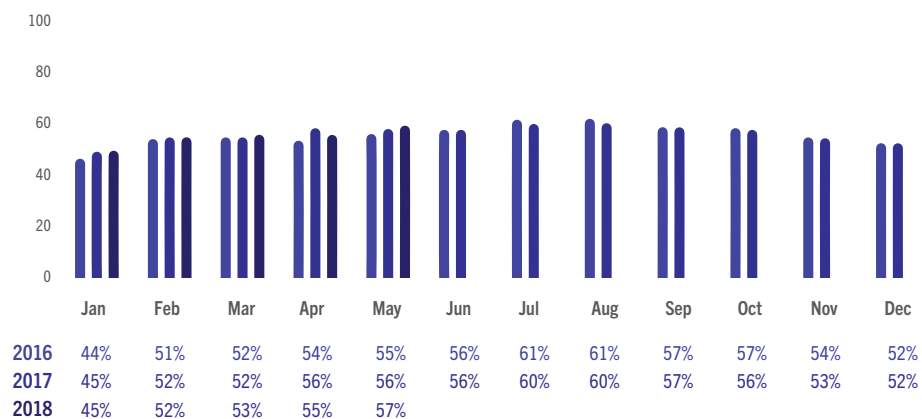Table to the left shows the room supply and room demand year on year relative percentage change.

England Room and Bedspace Occupancy

Data Tables

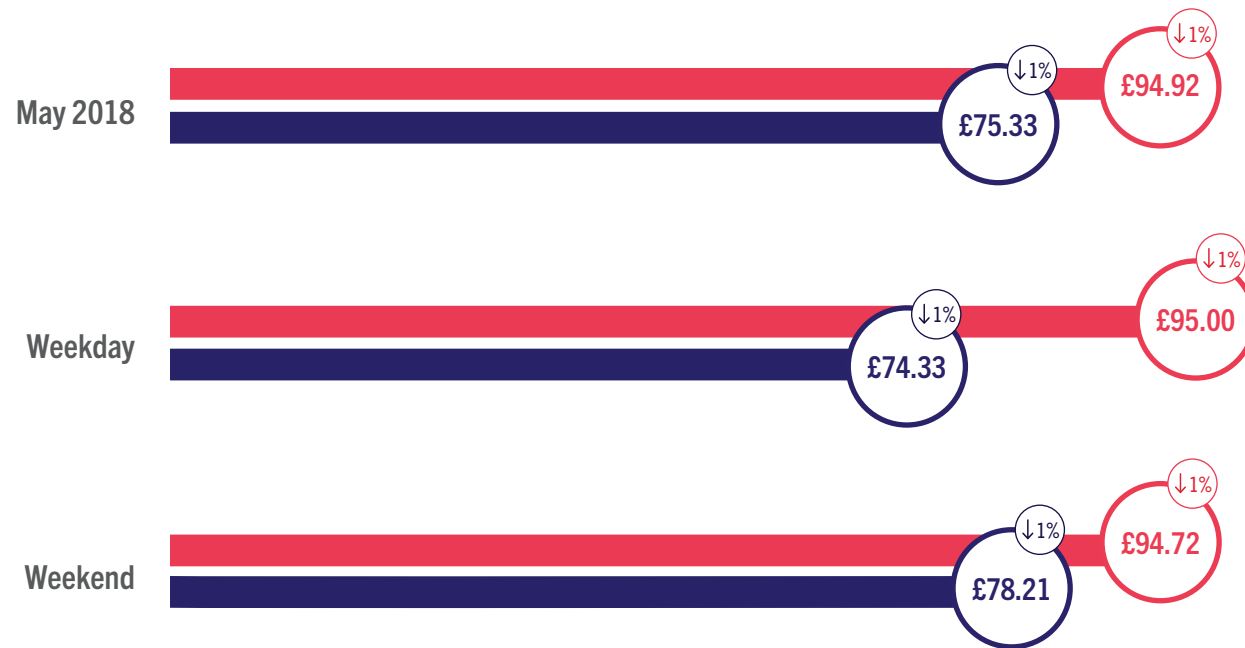|	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2016	62%	73%	73%	77%	78%	81%	84%	81%	85%	81%	79%	71%
2017	64%	74%	75%	78%	79%	81%	84%	81%	84%	80%	78%	71%
2018	65%	74%	75%	77%	79%							

England Room Occupancy by Month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2016	44%	51%	52%	54%	55%	56%	61%	61%	57%	57%	54%	52%
2017	45%	52%	52%	56%	56%	56%	60%	60%	57%	56%	53%	52%
2018	45%	52%	53%	55%	57%							

England Bedspace Occupancy by Month

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England ADR and RevPAR

At a glance - May 2018

● ADR ● RevPAR ⊙ % Change

May 2018
↓1% £75.33
↓1% £94.92

Weekday
↓1% £74.33
↓1% £95.00

Weekend
↓1% £78.21
↓1% £94.72

England ADR and RevPAR

Data Tables

ADR	2016	2017	2018
May	£91.23	£96.21	£94.92
Weekday	£91.68	£96.41	£95.00
Weekend	£90.05	£95.64	£94.72

RevPAR	2016	2017	2018
May	£70.74	£76.10	£75.33
Weekday	£69.71	£75.21	£74.33
Weekend	£73.70	£78.67	£78.21

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Room Occupancy By Region

At a glance - May 2018

*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.

↓1% 74% Northeast England

↓1% 77% Northwest England

↑1% 75% Yorkshire & Humberside

↑3% 75% East Midlands

↑1% 75% West Midlands

↑1% 78% East England

↓1% 83% Greater London

↑2% 81% Southwest England

↑1% 81% Southeast England
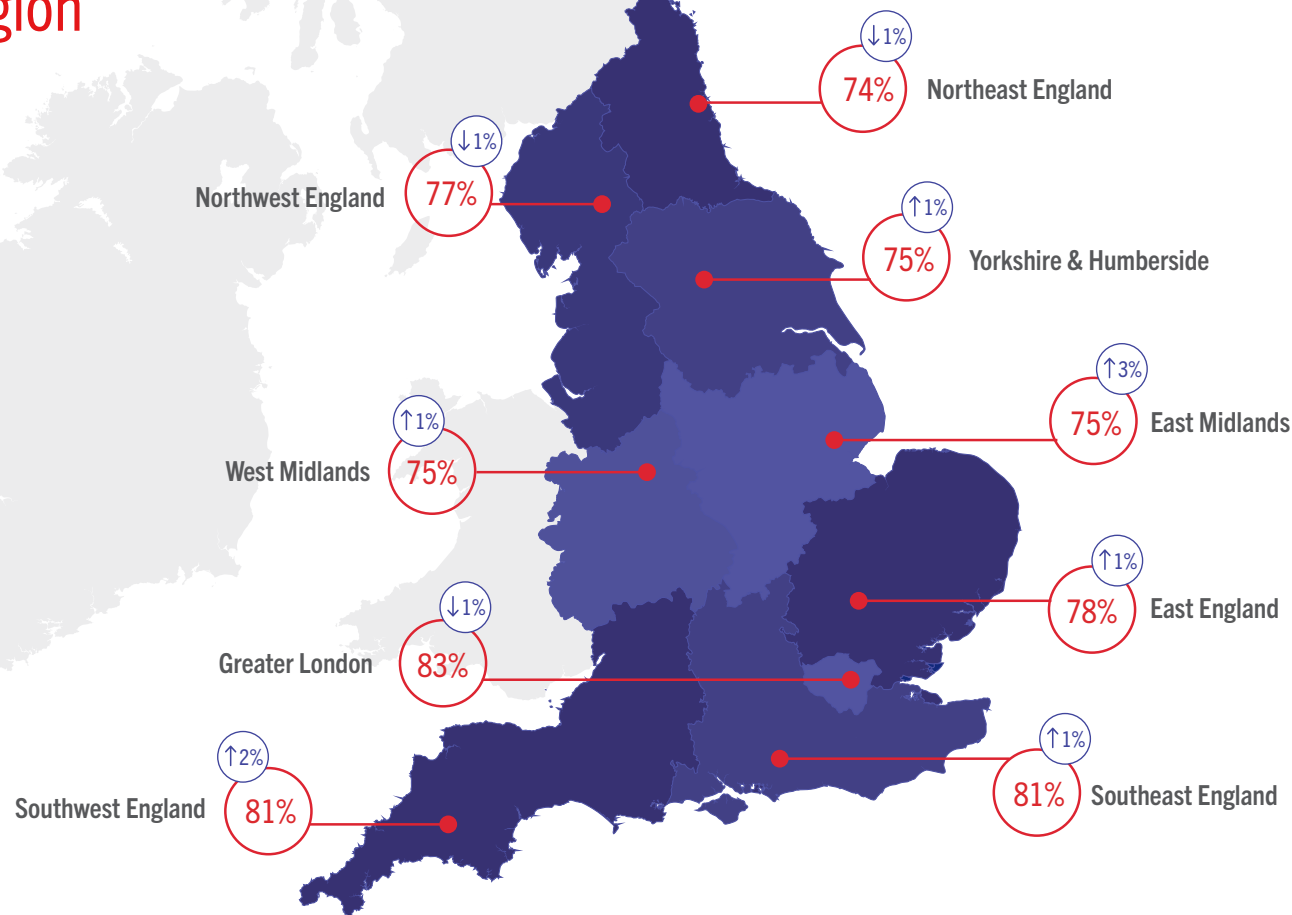
Occupancy By Region

Data Tables

Room Occupancy	2016	2017	2018
East England	77%	78%	78%
East Midlands	72%	73%	75%
Greater London	82%	83%	83%
Northeast England	71%	74%	74%
Northwest England	75%	78%	77%
Southeast England	79%	80%	81%
Southwest England	79%	79%	81%
West Midlands	71%	74%	75%
Yorkshire & Humberside	74%	75%	75%

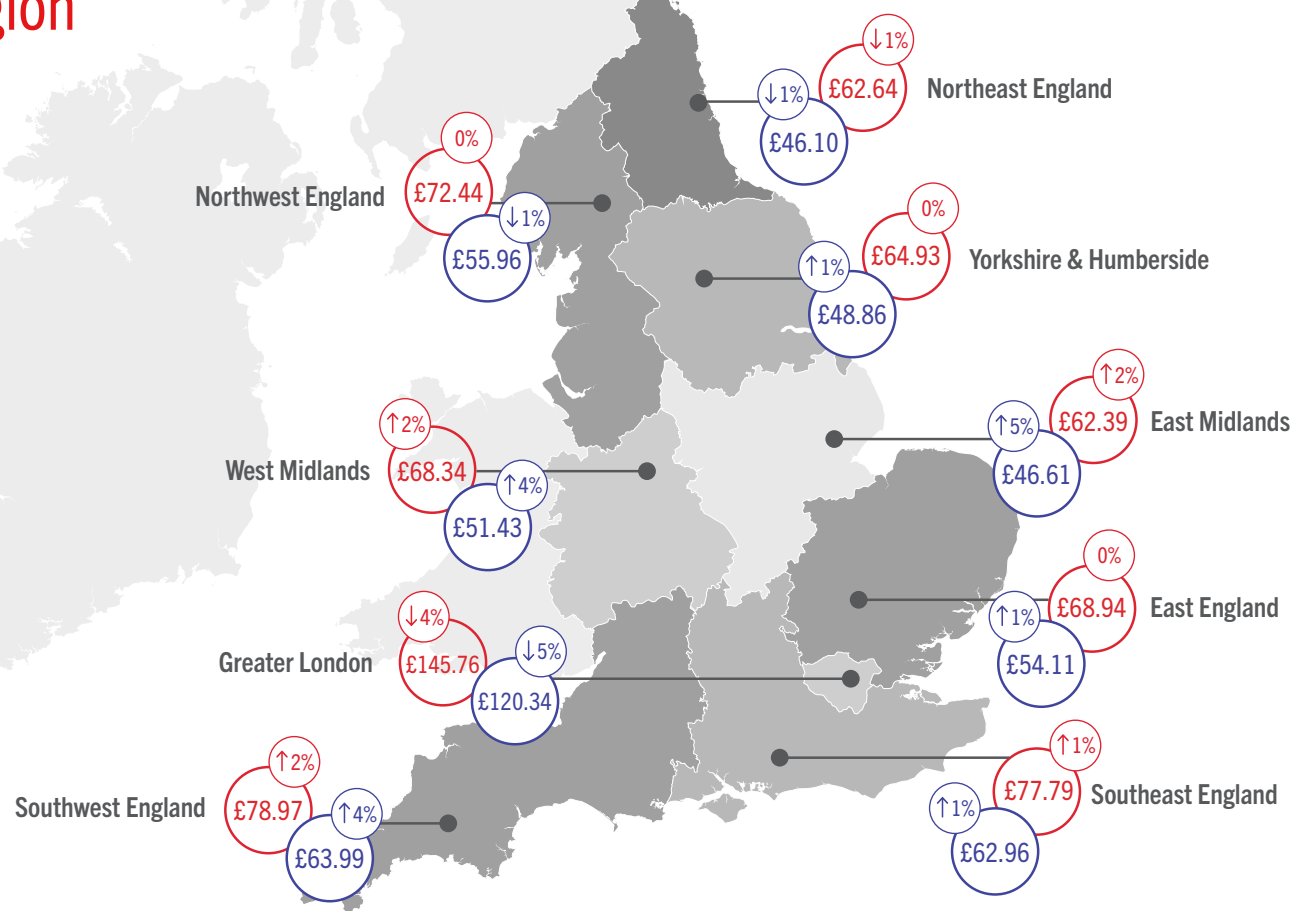| Bedspace Occupancy	2016	2017	2018
East England	55%	55%	56%
East Midlands	51%	51%	53%
Greater London	59%	60%	60%
Northeast England	50%	52%	52%
Northwest England	54%	55%	55%
Southeast England	56%	56%	57%
Southwest England	55%	55%	57%
West Midlands	48%	50%	52%
Yorkshire & Humberside	53%	53%	54%

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ADR and RevPAR By Region

At a glance - May 2018

*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

Northeast England
↓1% £62.64
↓1% £46.10

Northwest England
0% £72.44
↓1% £55.96

Yorkshire & Humberside
0% £64.93
↑1% £48.86

East Midlands
↑2% £62.39
↑5% £46.61

West Midlands
↑2% £68.34
↑4% £51.43

East England
0% £68.94
↑1% £54.11

Greater London
↓4% £145.76
↓5% £120.34

Southwest England
↑2% £78.97
↑4% £63.99

Southeast England
↑1% £77.79
↑1% £62.96

ADR and RevPAR By Region

Data Tables

ADR	2016	2017	2018
East England	£65.94	£69.20	£68.94
East Midlands	£58.72	£60.90	£62.39
Greater London	£141.80	£151.33	£145.76
Northeast England	£63.98	£62.96	£62.64
Northwest England	£68.57	£72.72	£72.44
Southeast England	£75.32	£77.29	£77.79
Southwest England	£73.70	£77.51	£78.97
West Midlands	£63.28	£66.72	£68.34
Yorkshire & Humberside	£62.22	£64.94	£64.93

RevPAR	2016	2017	2018
East England	£51.04	£53.65	£54.11
East Midlands	£42.27	£44.34	£46.61
Greater London	£115.78	£126.04	£120.34
Northeast England	£45.49	£46.70	£46.10
Northwest England	£51.75	£56.62	£55.96
Southeast England	£59.61	£62.10	£62.96
Southwest England	£58.16	£61.56	£63.99
West Midlands	£44.92	£49.60	£51.43
Yorkshire & Humberside	£45.88	£48.61	£48.86

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Room Occupancy By Destination Type

At a glance - May 2018

↑3%
73%

↑4%
80%

↑2%
77%

0%
80%

Countryside

Seaside

Small Town

City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy	2016	2017	2018
City / Large Town	78%	80%	80%
Small Town	75%	76%	77%
Countryside	72%	71%	73%
Seaside	78%	77%	80%

Bedspace Occupancy	2016	2017	2018
City / Large Town	55%	55%	56%
Small Town	54%	54%	56%
Countryside	49%	49%	51%
Seaside	59%	57%	61%

Room Occupancy By Number of Rooms

At a glance - May 2018

80%
101+ Rooms
0%

78%
51-100 Rooms
↑1%

77%
26-50 Rooms
0%

75%
1-25 Rooms
↓1%

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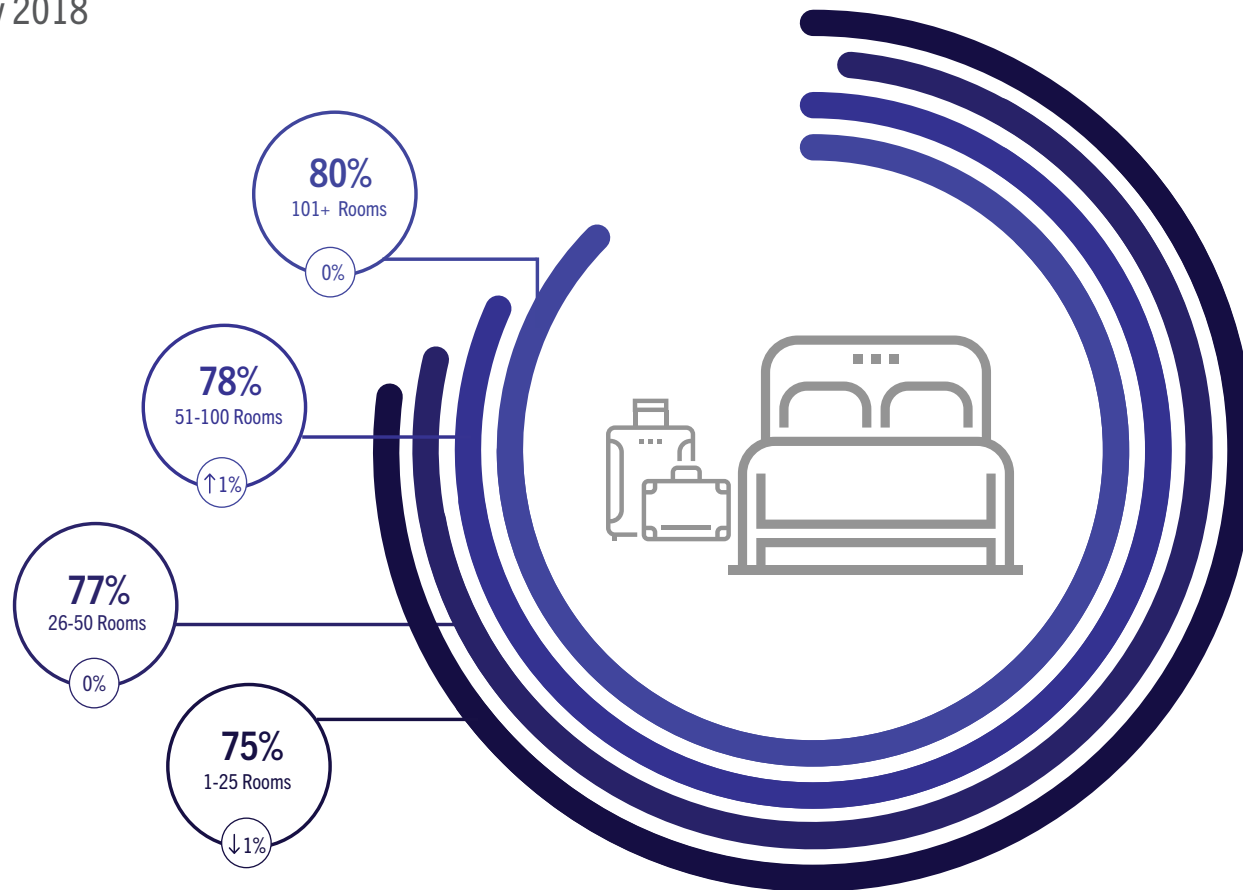
Occupancy By Number of Rooms

Data Tables

Room Occupancy	2016	2017	2018
1-25 Rooms	75%	76%	75%
26-50 Rooms	76%	77%	77%
51-100 Rooms	76%	77%	78%
101+ Rooms	78%	80%	80%

Bedspace Occupancy	2016	2017	2018
1-25 Rooms	55%	55%	55%
26-50 Rooms	55%	55%	56%
51-100 Rooms	56%	57%	58%
101+ Rooms	55%	56%	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.

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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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