

England Occupancy Survey

October 2020 Results



Summary of Results

Room occupancy in October 2020 decreased by 40% to 41% whilst bedspace occupancy in October 2020 decreased by 28% to 29% when compared to October 2019. In October 2020, room supply decreased by 4.6% when compared to October 2019. Meanwhile, room demand decreased by 51.8% when compared to the same month last year.

RevPAR, which is the total room revenue divided by the total number of available rooms, decreased by 66% to £27.34 in October 2020 when compared to the same month last year.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy decreased the most by 44% to 39% followed by Small Town hotel occupancy which decreased by 30% to 48% and Countryside hotel occupancy which decreased by 16% to 57%. The smallest change from last year was recorded for Seaside hotels as occupancy decreased by 15% to 64%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased the most by 48% to 35% followed by hotels with 51 to 100 rooms which decreased occupancy by 26% to 55% and hotels with 1 to 25 rooms which decreased occupancy by 24% to 52% and hotels with 26 to 50 rooms which decreased occupancy by 24% to 55%.

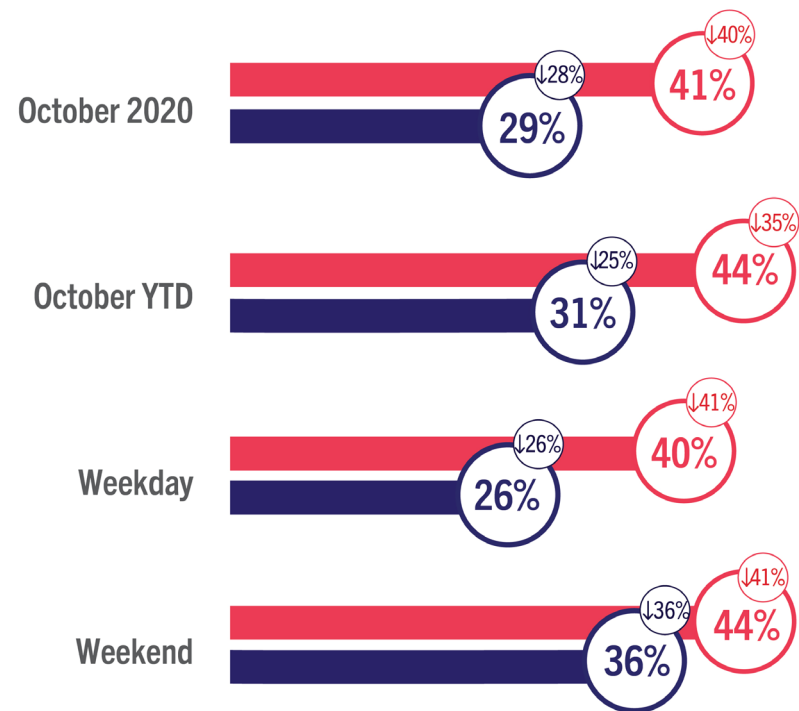
Evaluating trends across the **9 regions** of England, 0 regions achieved increased room occupancy whilst 9 regions achieved decreased room occupancy compared to the same month last year. The four regions that recorded the greatest change in room occupancy from last year were Greater London which decreased occupancy by 58% to 29%, Northwest England which decreased occupancy by 44% to 37%, West Midlands which decreased occupancy by 40% to 39% and Northeast England which decreased occupancy by 37% to 38%.

Please see the Methodology Statement on page 16 regarding current data during the Covid-19 pandemic.

England Room and Bedspace Occupancy

At a glance - October 2020

● Room ● Bedspace ⓘ % Change



*Please note: As of February 2019 occupancy percentage changes are expressed in absolute terms. For more information please see 'Methodology Statement' on page 16.

England Room and Bedspace Occupancy

Data Tables

Room Occupancy

	2018	2019	2020
October	83%	82%	41%
October YTD	79%	78%	44%
Weekday	82%	81%	40%
Weekend	86%	84%	44%

Bedspace Occupancy

	2018	2019	2020
October	58%	57%	29%
October YTD	56%	56%	31%
Weekday	53%	52%	26%
Weekend	73%	72%	36%

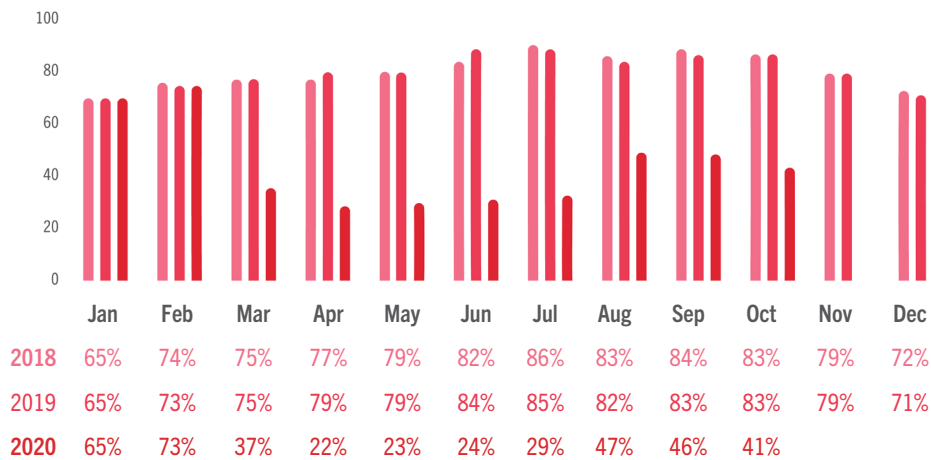
	2018	2019	2020
Room Supply	1.7%	1.9%	-4.6%
Room Demand	5.1%	0.6%	-51.8%

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

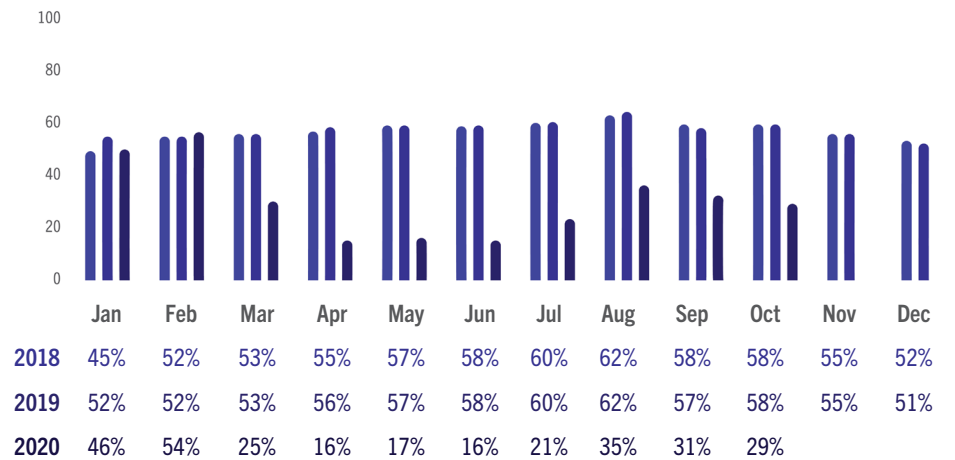


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - October 2020

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2018	2019	2020
October	£100.56	£99.42	£66.19
Weekday	£101.55	£100.01	£63.15
Weekend	£97.85	£97.80	£72.03

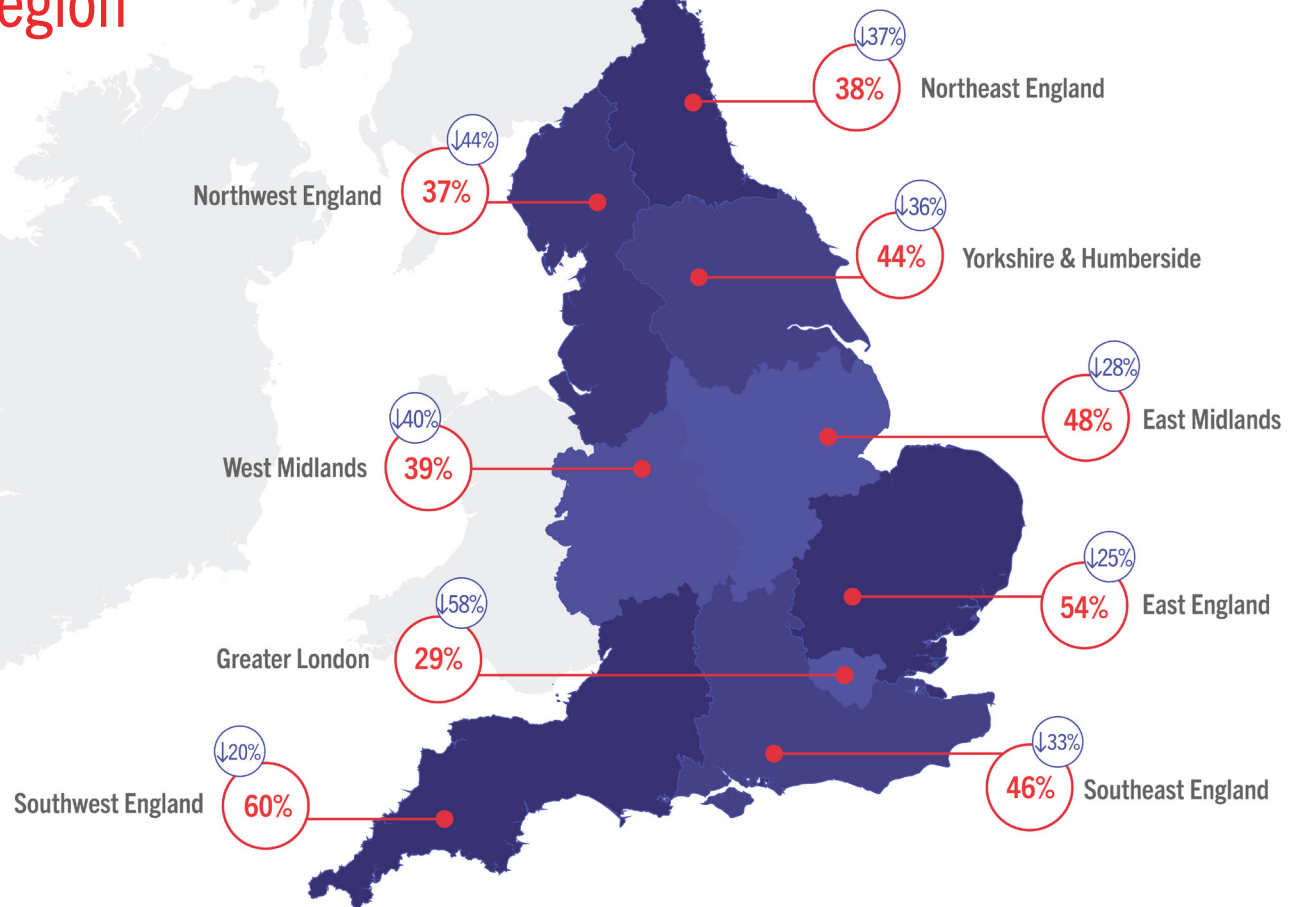
RevPAR

	2018	2019	2020
October	£83.29	£81.26	£27.34
Weekday	£83.02	£80.78	£25.33
Weekend	£84.05	£82.64	£31.54

Room Occupancy By Region

At a glance - October 2020

*The figures in the graphic show the latest month occupancy figures and year-on-year percentage changes (in absolute terms).





Occupancy By Region

Data Tables

Room Occupancy

	2018	2019	2020
East England	81%	79%	54%
East Midlands	78%	76%	48%
Greater London	89%	87%	29%
Northeast England	77%	75%	38%
Northwest England	83%	81%	37%
Southeast England	80%	79%	46%
Southwest England	80%	80%	60%
West Midlands	80%	79%	39%
Yorkshire & Humberside	77%	79%	44%

Bedspace Occupancy

	2018	2019	2020
East England	57%	56%	39%
East Midlands	54%	53%	34%
Greater London	64%	63%	21%
Northeast England	54%	52%	27%
Northwest England	58%	57%	27%
Southeast England	56%	55%	33%
Southwest England	55%	55%	43%
West Midlands	53%	53%	27%
Yorkshire & Humberside	55%	56%	31%

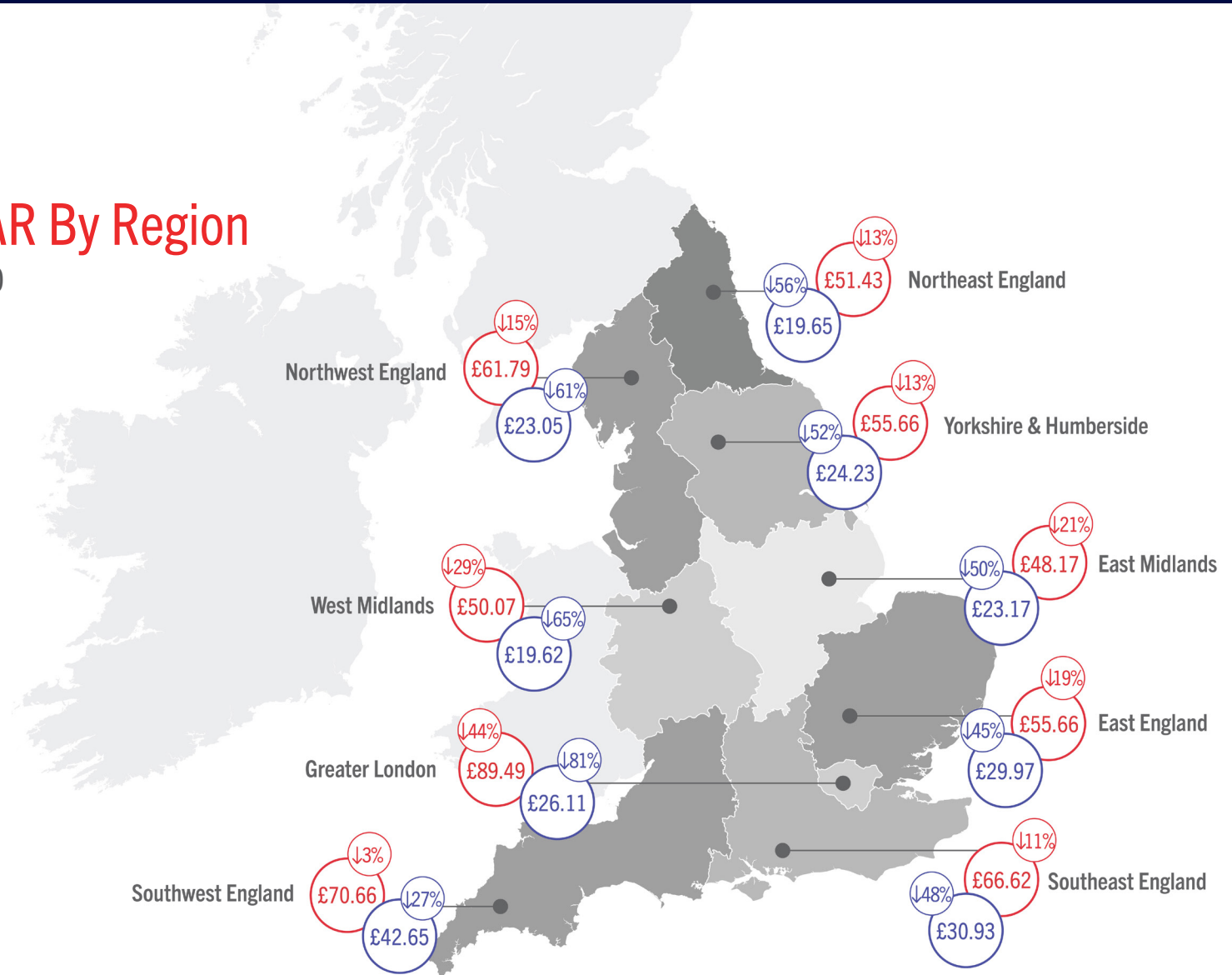


ADR and RevPAR By Region

At a glance - October 2020

*The figures in the graphic show the latest month revenue figures and year-on-year percentage changes (in relative terms).

● ADR ● RevPAR ⌚ % Change



ADR and RevPAR By Region

Data Tables

ADR

	2018	2019	2020
East England	£70.02	£68.41	£55.66
East Midlands	£62.93	£60.68	£48.17
Greater London	£158.84	£160.29	£89.49
Northeast England	£60.40	£59.26	£51.43
Northwest England	£75.40	£72.68	£61.79
Southeast England	£76.65	£74.62	£66.62
Southwest England	£73.68	£72.65	£70.66
West Midlands	£73.95	£70.53	£50.07
Yorkshire & Humberside	£64.49	£63.79	£55.66

RevPAR

	2018	2019	2020
East England	£56.42	£54.26	£29.97
East Midlands	£49.39	£46.37	£23.17
Greater London	£141.60	£140.04	£26.11
Northeast England	£46.58	£44.71	£19.65
Northwest England	£62.59	£58.85	£23.05
Southeast England	£61.22	£59.25	£30.93
Southwest England	£59.02	£58.03	£42.65
West Midlands	£59.02	£55.74	£19.62
Yorkshire & Humberside	£49.96	£50.68	£24.23



Room Occupancy By Destination Type

At a glance - October 2020



Countryside



Seaside



Small Town



City / Large Town

Occupancy By Location Type

Data Tables

Room Occupancy

	2018	2019	2020
City / Large Town	84%	83%	39%
Small Town	79%	78%	48%
Countryside	71%	73%	57%
Seaside	79%	79%	64%

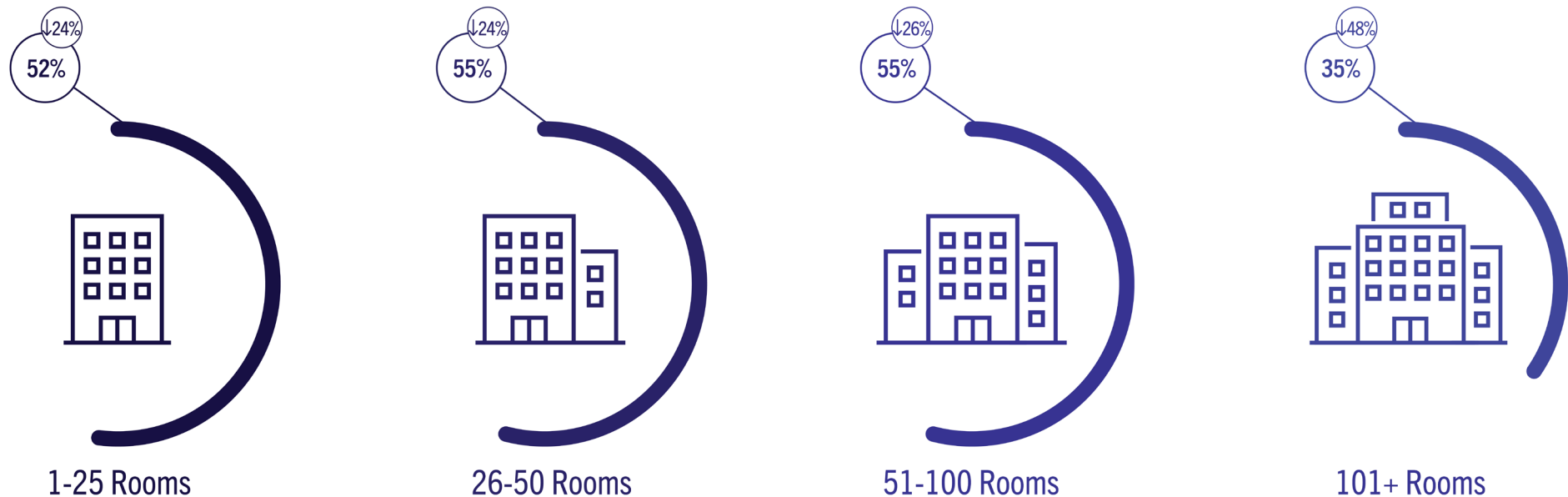
Bedspace Occupancy

	2018	2019	2020
City / Large Town	58%	57%	27%
Small Town	57%	56%	35%
Countryside	48%	50%	40%
Seaside	59%	59%	48%



Room Occupancy By Number of Rooms

At a glance - October 2020



*Please note: As of February 2019 occupancy percentage changes are expressed in absolute terms. For more information please see 'Methodology Statement' on page 16.

Occupancy By Number of Rooms

Data Tables

Room Occupancy

	2018	2019	2020
1 to 25 Rooms	77%	77%	52%
26 to 50 Rooms	78%	79%	55%
51 to 100 Rooms	81%	81%	55%
101+ Rooms	84%	83%	35%

Bedspace Occupancy

	2018	2019	2020
1 to 25 Rooms	55%	55%	39%
26 to 50 Rooms	56%	56%	40%
51 to 100 Rooms	59%	59%	41%
101+ Rooms	58%	57%	24%



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 3,000 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 (ADR) and Revenue Per Available Room (RevPAR). 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.

In February 2019, a change in reporting style was made to refer to percentage changes of occupancy data in absolute terms. Please note that the room and bedspace occupancy figures in this report are rounded to the nearest whole number. As a result, occupancy absolute percentage change figures may have a discrepancy of $\pm 1\%$. 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.

Due to Covid-19, the England hotel industry saw an unprecedented number of hotels temporarily close their doors starting in March of 2020. Throughout the pandemic, STR has continued to collect performance data from those hotels who remained open. The data in this month's report is therefore only based on those hotels that were open and reported data to STR (N=3,298).



For information on how to contribute and participate in the England Occupancy Study and benefit from STR's property level benchmarking reports, please email hotelinfo@str.com.

For more information on STR's other available products and pricing:

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