

# England Occupancy Survey

August 2020 Results



## Summary of Results

**Room occupancy** in August 2020 decreased by 36% to 47% whilst bedspace occupancy in August 2020 decreased by 27% to 35% when compared to August 2019. In August 2020, room supply decreased by 7.5% when compared to August 2019. Meanwhile, room demand decreased by 47.6% 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 58% to £32.88 in August 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 39% to 43% followed by Small Town hotel occupancy which decreased by 26% to 54% and Countryside hotel occupancy which decreased by 12% to 67%. The smallest change from last year was recorded for Seaside hotels as occupancy decreased by 9% to 80%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased the most by 42% to 40% followed by hotels with 51 to 100 rooms which decreased occupancy by 23% to 58% and hotels with 26 to 50 rooms which decreased occupancy by 21% to 61%. The smallest change from last year was recorded for hotels with 1 to 25 rooms as occupancy decreased by 18% to 63%.

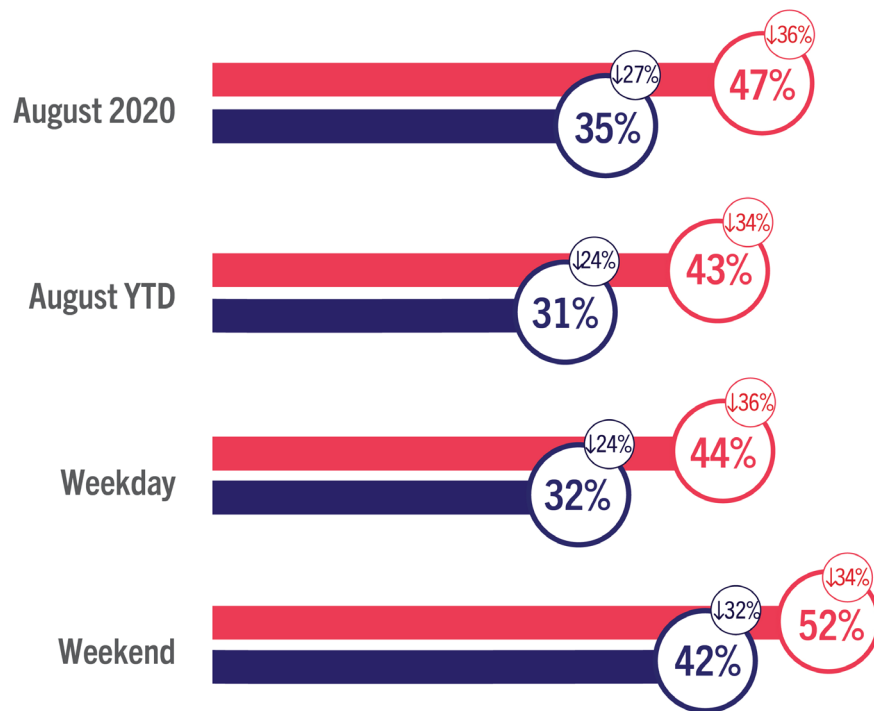
Evaluating trends across the **9 regions** of England, 0 regions achieved increased room occupancy whilst 9 regions achieved decreased room occupancy compared to the same month last year. The four regions that recorded the greatest change in room occupancy from last year were Greater London which decreased occupancy by 56% to 30%, Northwest England which decreased occupancy by 34% to 47%, West Midlands which decreased occupancy by 33% to 43% and Southeast England which decreased occupancy by 33% to 50%.

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

## England Room and Bedspace Occupancy

At a glance - August 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
August	83%	82%	47%
August YTD	77%	77%	43%
Weekday	81%	80%	44%
Weekend	87%	86%	52%

#### Bedspace Occupancy

	2018	2019	2020
August	62%	62%	35%
August YTD	55%	55%	31%
Weekday	57%	56%	32%
Weekend	74%	73%	42%

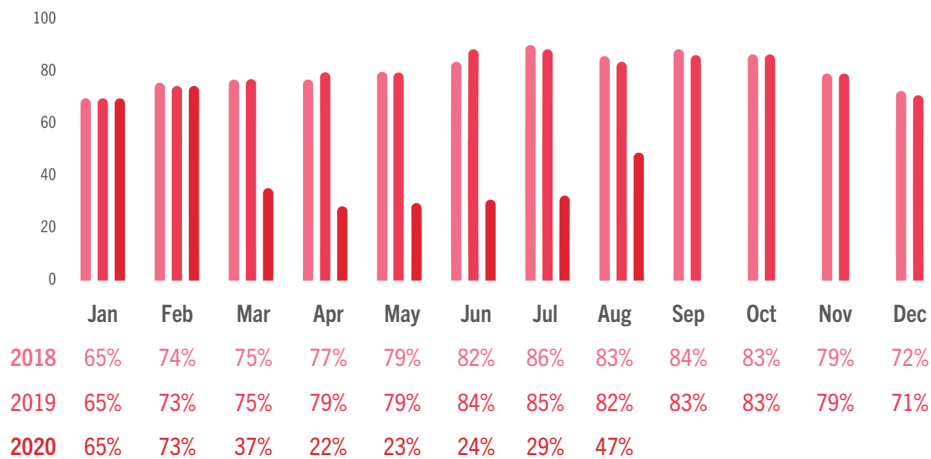
	2018	2019	2020
Room Supply	1.3%	2.3%	-7.5%
Room Demand	3.6%	1.8%	-47.6%

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

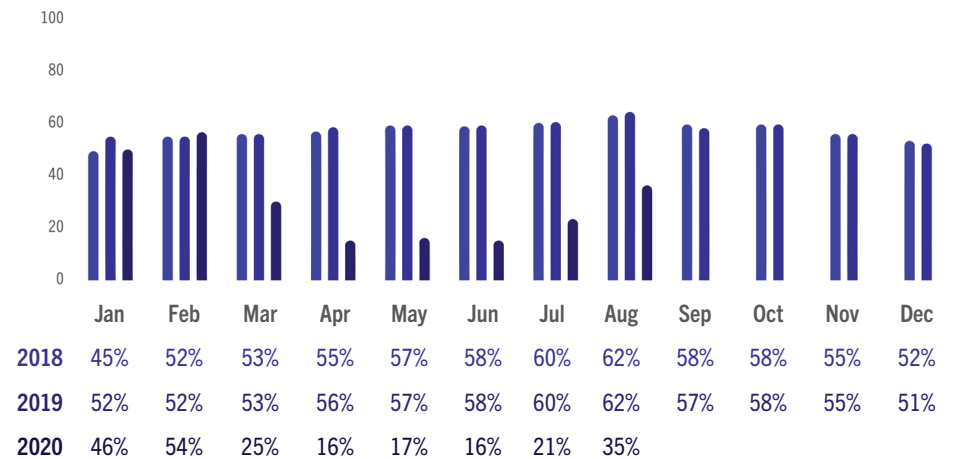


## England Room and Bedspace Occupancy

### Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



## England ADR and RevPAR

At a glance - August 2020

● ADR ● RevPAR ⓘ % Change





## England ADR and RevPAR

### Data Tables

#### ADR

	2018	2019	2020
August	£94.27	£96.17	£70.70
Weekday	£92.84	£94.34	£68.04
Weekend	£97.53	£99.78	£76.23

#### RevPAR

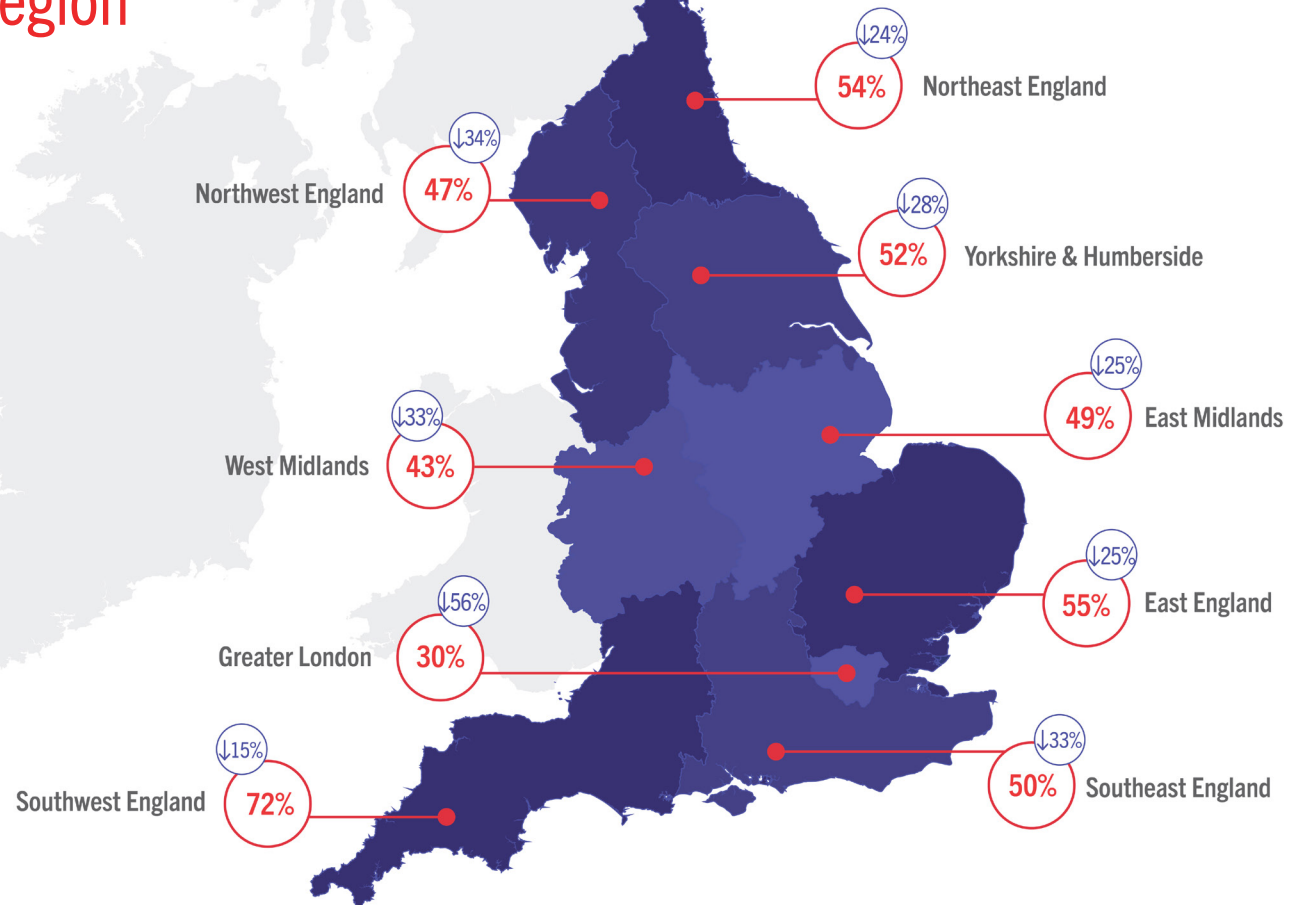
	2018	2019	2020
August	£77.82	£78.93	£32.88
Weekday	£74.99	£75.73	£30.11
Weekend	£84.77	£85.66	£39.67



## Room Occupancy By Region

At a glance - August 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	80%	79%	55%
East Midlands	77%	73%	49%
Greater London	87%	86%	30%
Northeast England	77%	78%	54%
Northwest England	82%	80%	47%
Southeast England	83%	82%	50%
Southwest England	87%	87%	72%
West Midlands	75%	75%	43%
Yorkshire & Humberside	79%	80%	52%

#### Bedspace Occupancy

	2018	2019	2020
East England	60%	60%	41%
East Midlands	59%	57%	37%
Greater London	67%	67%	23%
Northeast England	57%	58%	40%
Northwest England	63%	62%	36%
Southeast England	62%	62%	37%
Southwest England	64%	65%	53%
West Midlands	54%	54%	30%
Yorkshire & Humberside	59%	61%	39%

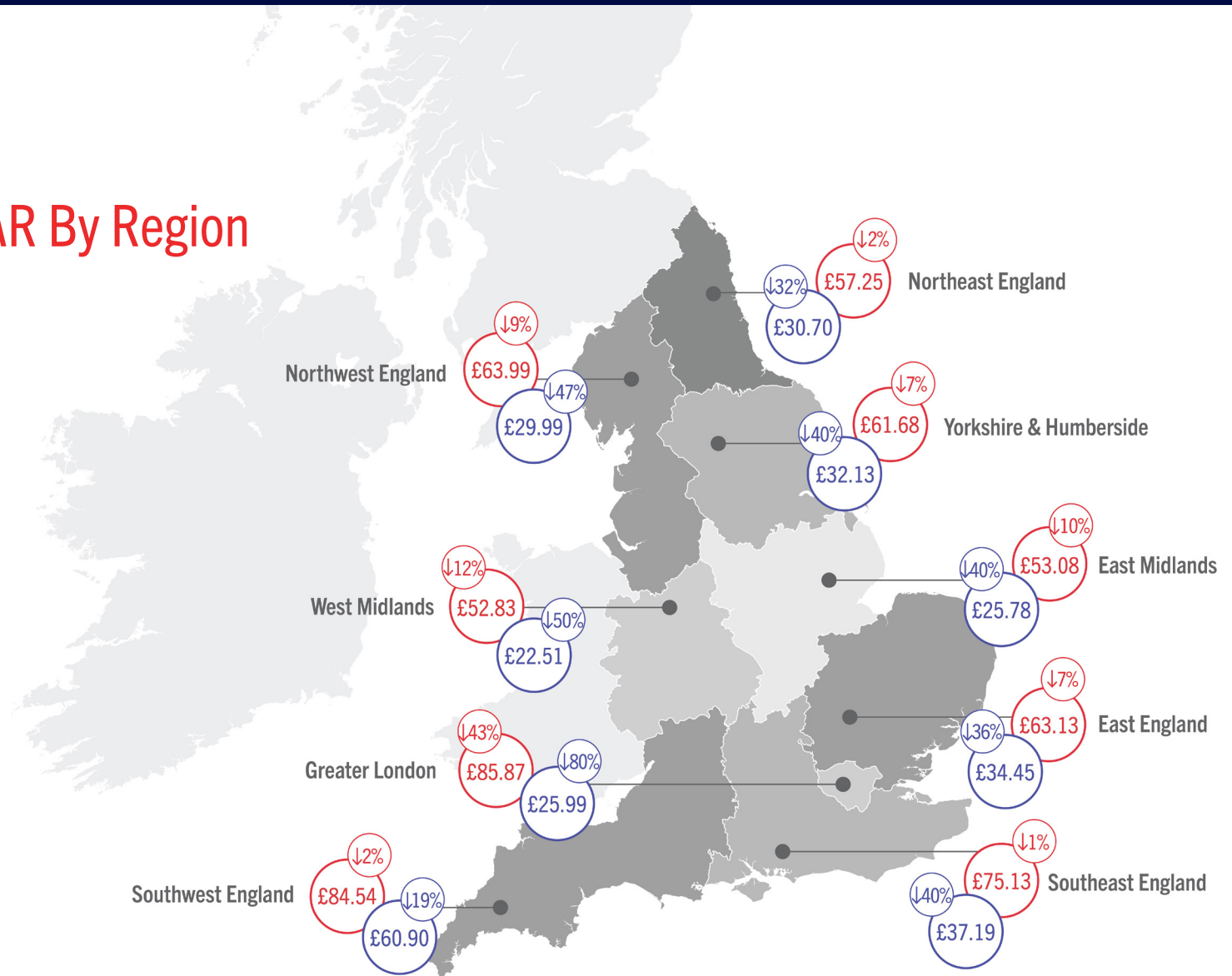


## ADR and RevPAR By Region

At a glance - August 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	£67.76	£67.66	£63.13
East Midlands	£59.65	£58.98	£53.08
Greater London	£143.91	£150.84	£85.87
Northeast England	£58.16	£58.44	£57.25
Northwest England	£69.70	£70.20	£63.99
Southeast England	£76.94	£75.62	£75.13
Southwest England	£88.44	£86.46	£84.54
West Midlands	£59.43	£60.19	£52.83
Yorkshire & Humberside	£63.05	£66.29	£61.68

#### RevPAR

	2018	2019	2020
East England	£54.22	£53.58	£34.45
East Midlands	£45.71	£43.29	£25.78
Greater London	£124.70	£130.03	£25.99
Northeast England	£44.84	£45.39	£30.70
Northwest England	£56.94	£56.45	£29.99
Southeast England	£63.65	£62.09	£37.19
Southwest England	£76.57	£75.27	£60.90
West Midlands	£44.80	£45.36	£22.51
Yorkshire & Humberside	£49.66	£53.32	£32.13



## Room Occupancy By Destination Type

At a glance - August 2020



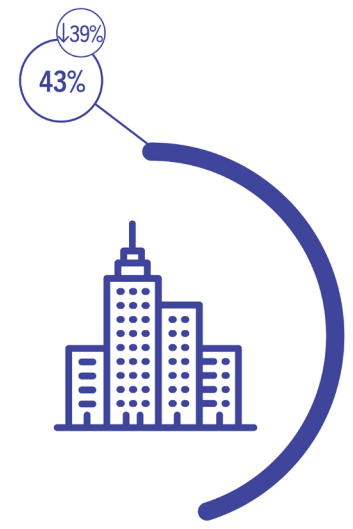
Countryside



Seaside



Small Town



City / Large Town

## Occupancy By Location Type

Data Tables

### Room Occupancy

	2018	2019	2020
City / Large Town	83%	82%	43%
Small Town	80%	80%	54%
Countryside	79%	79%	67%
Seaside	89%	89%	80%

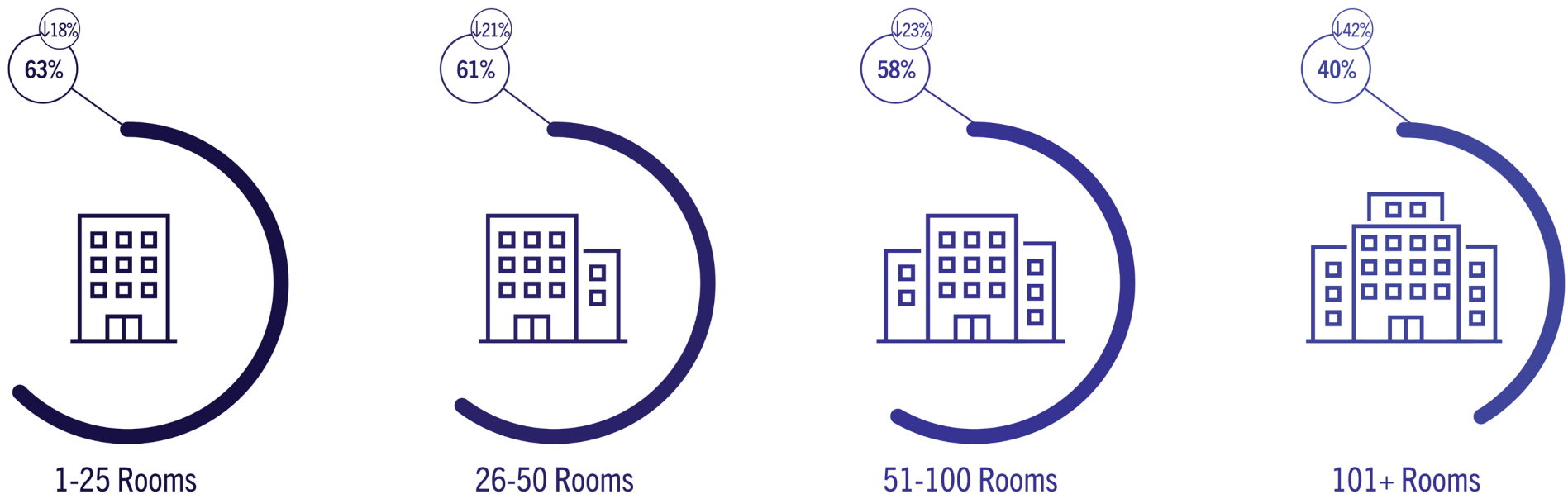
### Bedspace Occupancy

	2018	2019	2020
City / Large Town	61%	62%	32%
Small Town	61%	62%	41%
Countryside	59%	59%	50%
Seaside	74%	75%	67%



## Room Occupancy By Number of Rooms

At a glance - August 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	79%	81%	63%
26 to 50 Rooms	81%	82%	61%
51 to 100 Rooms	82%	82%	58%
101+ Rooms	83%	82%	40%

### Bedspace Occupancy

	2018	2019	2020
1 to 25 Rooms	62%	64%	50%
26 to 50 Rooms	62%	62%	46%
51 to 100 Rooms	63%	64%	45%
101+ Rooms	62%	62%	30%



## 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. Occupancy percentage changes in absolute terms may slightly differ between the tabular and graphical analyses in this report due to rounding. 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=2,973).



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](mailto:hotelinfo@str.com).

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

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