

England Occupancy Survey

December 2020 Results



Summary of Results

Room occupancy in December 2020 decreased by 44% to 27% whilst **bedspace occupancy** in December 2020 decreased by 32% to 19% when compared to December 2019. In December 2020, room supply decreased by 12.4% when compared to December 2019. Meanwhile, room demand decreased by 66.7% 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 76% to £16.33 in December 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 46% to 26% followed by Small Town hotel occupancy which decreased by 37% to 28% and Seaside hotel occupancy which decreased by 31% to 32%. The smallest change from last year was recorded for Countryside hotels as occupancy decreased by 30% to 26%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased the most by 48% to 24% followed by hotels with 1 to 25 rooms which decreased occupancy by 36% to 32% and hotels with 26 to 50 rooms which decreased occupancy by 34% to 34%. The smallest change from last year was recorded for hotels with 51 to 100 rooms as occupancy decreased by 31% to 38%.

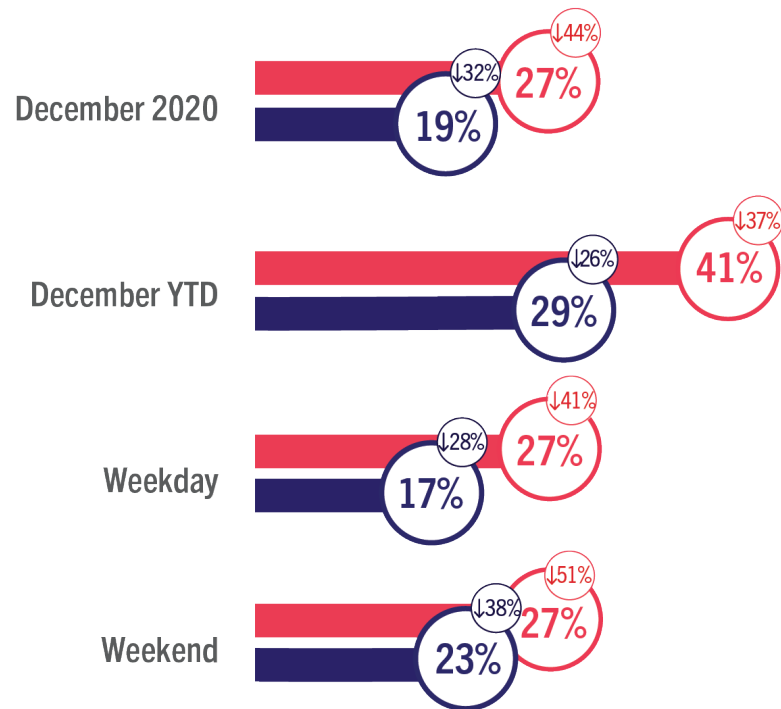
Evaluating trends across the **9 regions** of England, 0 regions achieved increased room occupancy whilst 9 regions achieved decreased room occupancy compared to the same month last year. The four regions that recorded the greatest change in room occupancy from last year were Greater London which decreased occupancy by 58% to 22%, Yorkshire & Humberside which decreased occupancy by 42% to 27%, Northwest England which decreased occupancy by 42% to 27% and Northeast England which decreased occupancy by 41% to 22%.

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

England Room and Bedspace Occupancy

At a glance - December 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
December	72%	71%	27%
December YTD	78%	78%	41%
Weekday	69%	68%	27%
Weekend	79%	78%	27%

Bedspace Occupancy

	2018	2019	2020
December	52%	51%	19%
December YTD	55%	55%	29%
Weekday	46%	45%	17%
Weekend	63%	62%	23%

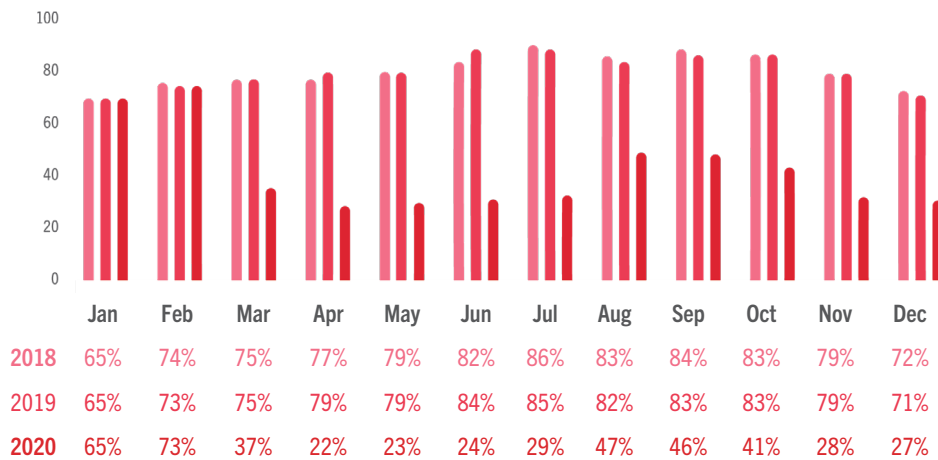
	2018	2019	2020
Room Supply	2.1%	1.8%	-12.4%
Room Demand	4.5%	0.0%	-66.7%

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

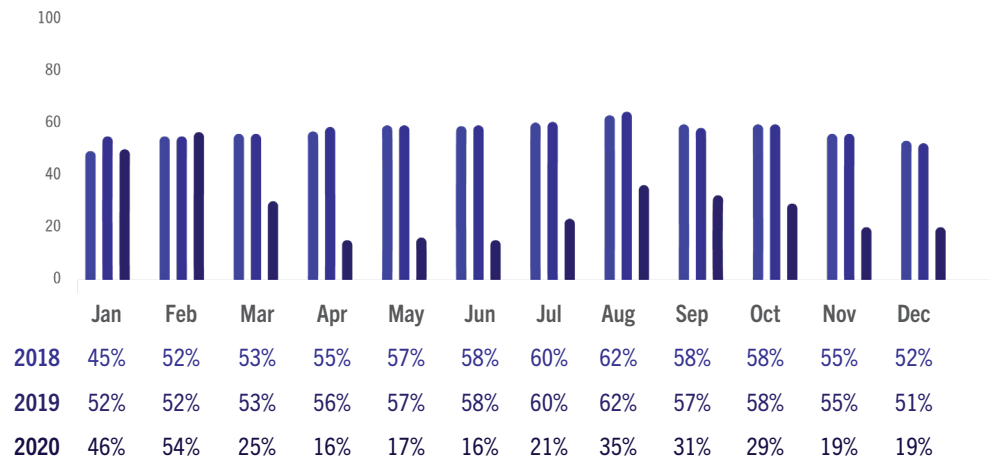


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - December 2020

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2018	2019	2020
December	£97.11	£97.71	£60.90
Weekday	£97.07	£98.33	£58.20
Weekend	£97.20	£96.18	£68.67

RevPAR

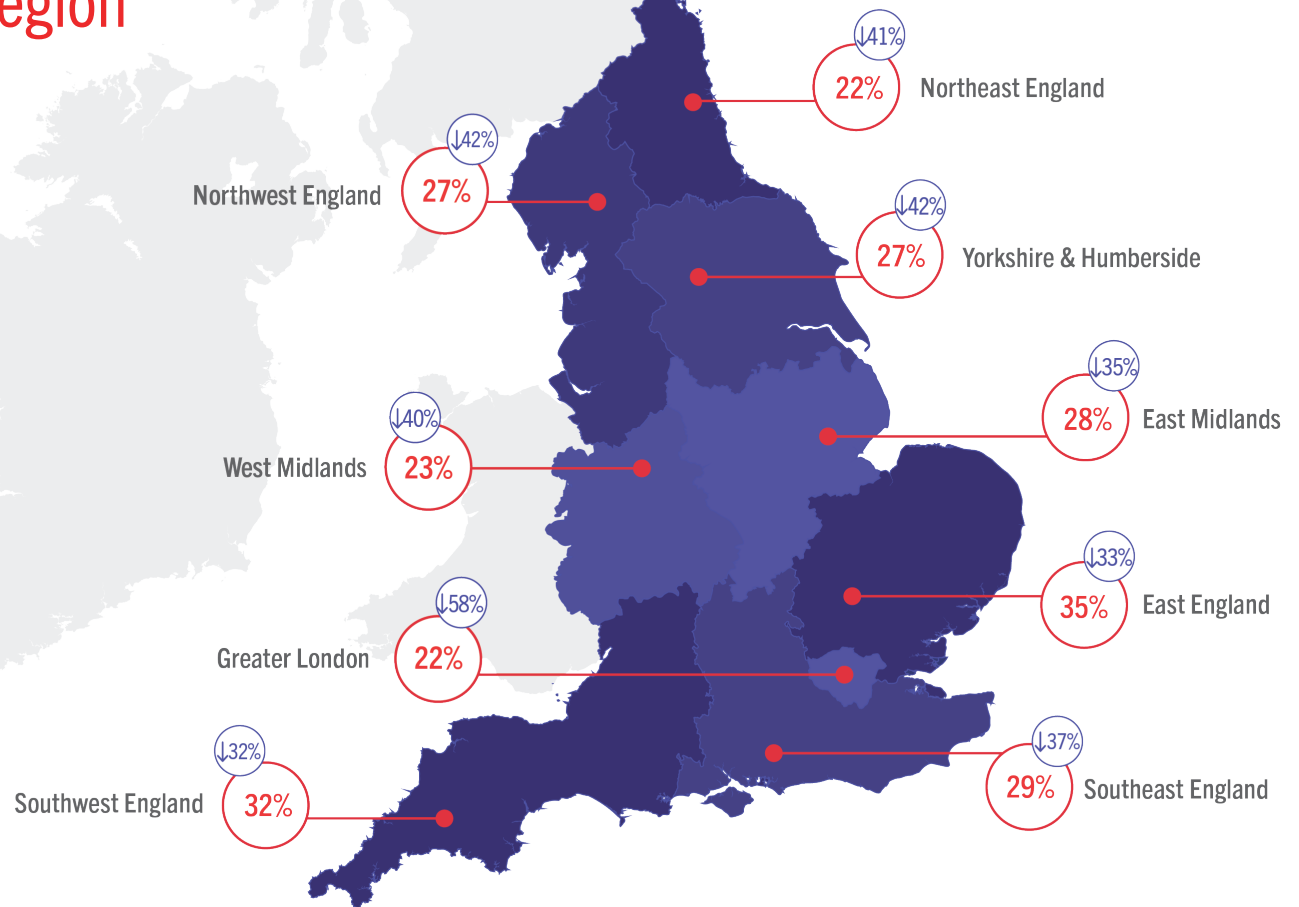
	2018	2019	2020
December	£69.82	£69.07	£16.33
Weekday	£67.12	£66.91	£15.61
Weekend	£76.40	£75.26	£18.40



Room Occupancy By Region

At a glance - December 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	68%	67%	35%
East Midlands	65%	63%	28%
Greater London	82%	81%	22%
Northeast England	64%	63%	22%
Northwest England	71%	69%	27%
Southeast England	68%	66%	29%
Southwest England	65%	65%	32%
West Midlands	66%	64%	23%
Yorkshire & Humberside	69%	69%	27%

Bedspace Occupancy

	2018	2019	2020
East England	50%	49%	25%
East Midlands	48%	46%	20%
Greater London	60%	59%	16%
Northeast England	46%	45%	16%
Northwest England	51%	50%	20%
Southeast England	49%	48%	21%
Southwest England	47%	46%	23%
West Midlands	46%	44%	16%
Yorkshire & Humberside	50%	50%	19%

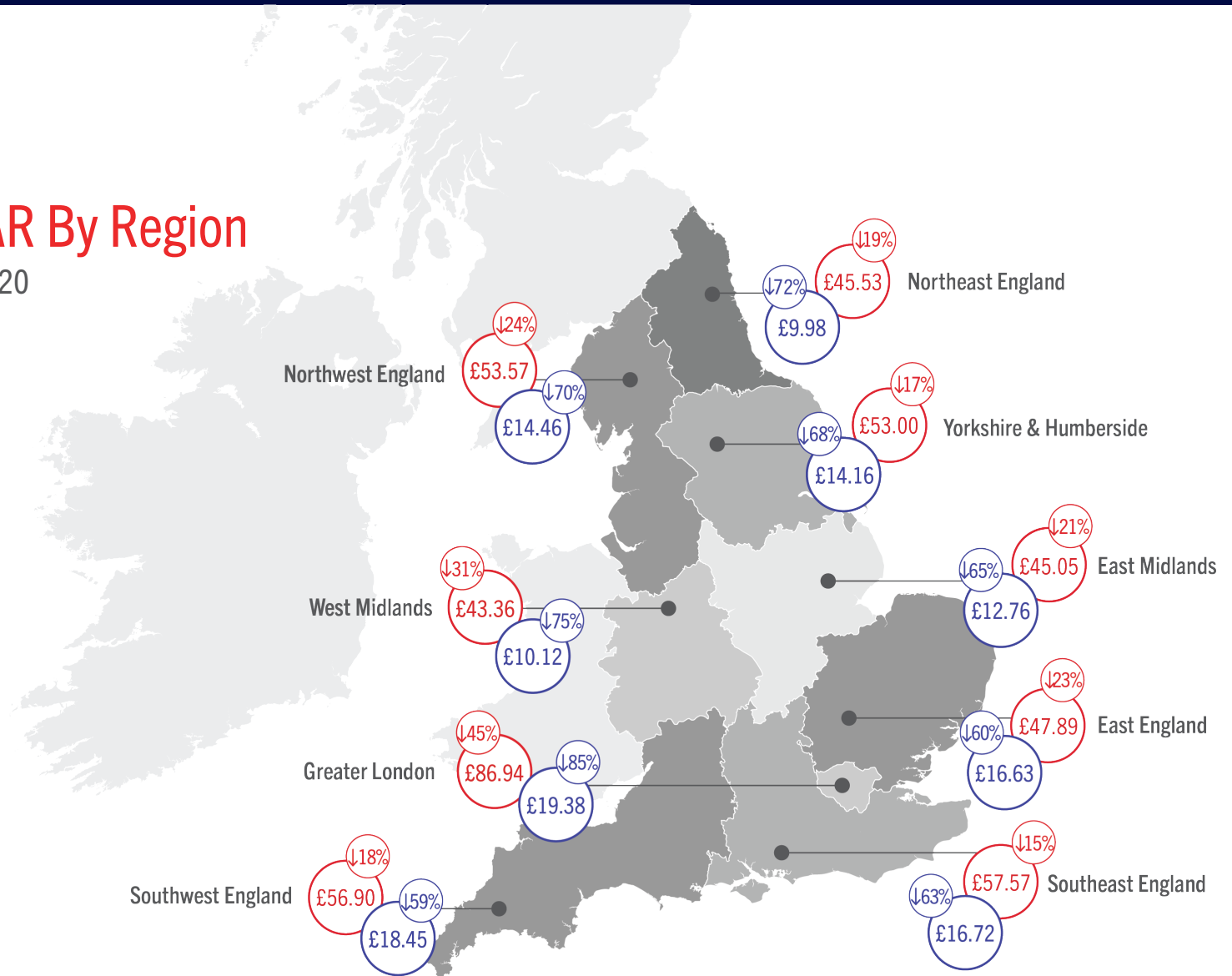


ADR and RevPAR By Region

At a glance - December 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

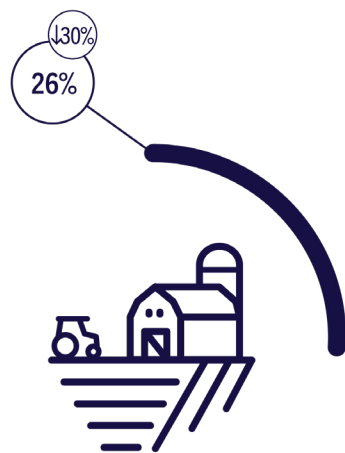
	2018	2019	2020
East England	£62.80	£61.95	£47.89
East Midlands	£58.13	£57.35	£45.05
Greater London	£154.91	£158.01	£86.94
Northeast England	£57.50	£56.46	£45.53
Northwest England	£72.77	£70.50	£53.57
Southeast England	£68.96	£67.78	£57.57
Southwest England	£69.37	£69.69	£56.90
West Midlands	£63.59	£62.90	£43.36
Yorkshire & Humberside	£64.31	£63.50	£53.00

RevPAR

	2018	2019	2020
East England	£42.85	£41.81	£16.63
East Midlands	£37.95	£36.41	£12.76
Greater London	£126.48	£127.23	£19.38
Northeast England	£36.79	£35.54	£9.98
Northwest England	£51.35	£48.84	£14.46
Southeast England	£46.98	£45.02	£16.72
Southwest England	£45.14	£45.07	£18.45
West Midlands	£42.24	£40.09	£10.12
Yorkshire & Humberside	£44.15	£43.88	£14.16

Room Occupancy By Destination Type

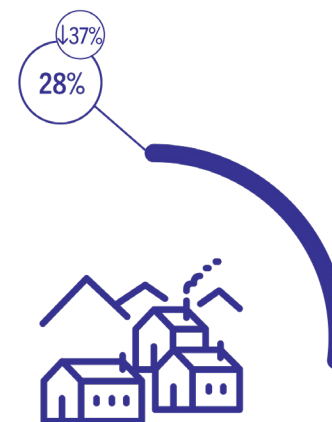
At a glance - December 2020



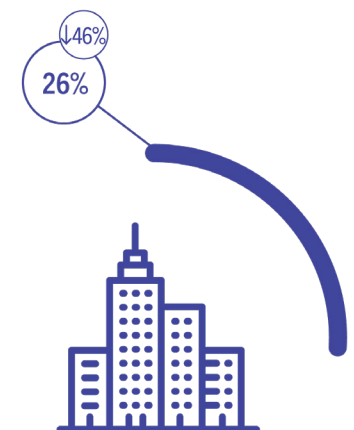
Countryside



Seaside



Small Town



City / Large Town

*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 Location Type

Data Tables

Room Occupancy

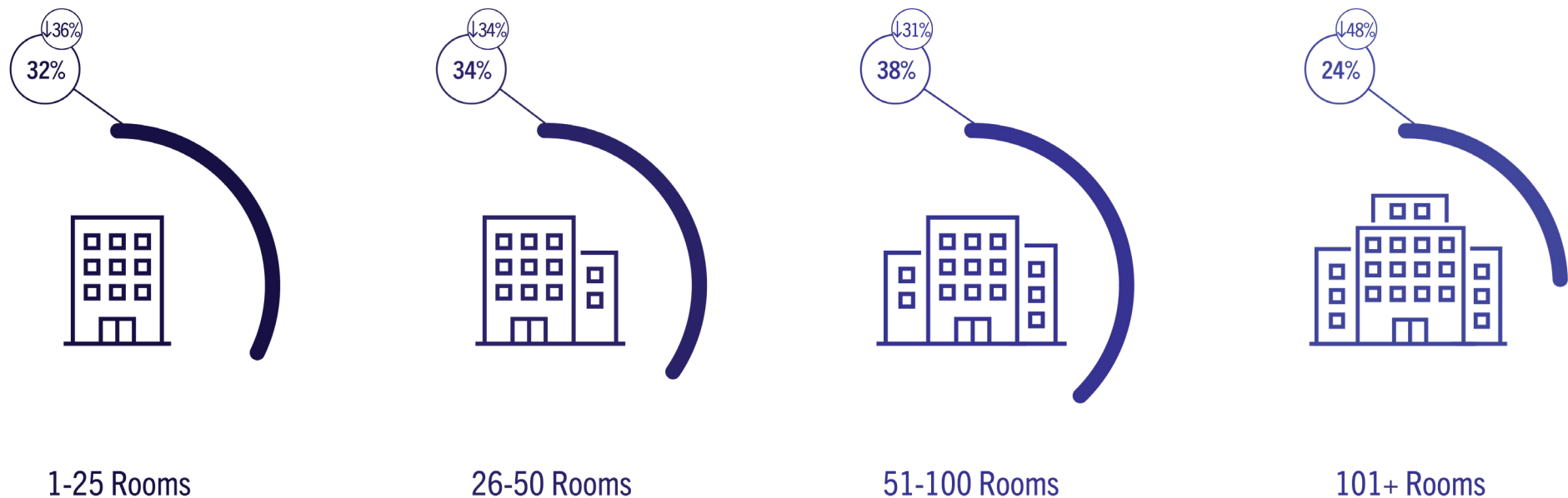
	2018	2019	2020
City / Large Town	74%	72%	26%
Small Town	66%	65%	28%
Countryside	59%	56%	26%
Seaside	66%	63%	32%

Bedspace Occupancy

	2018	2019	2020
City / Large Town	53%	52%	19%
Small Town	48%	48%	20%
Countryside	42%	39%	18%
Seaside	51%	49%	25%

Room Occupancy By Number of Rooms

At a glance - December 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	70%	68%	32%
26 to 50 Rooms	69%	68%	34%
51 to 100 Rooms	71%	69%	38%
101+ Rooms	73%	72%	24%

Bedspace Occupancy

	2018	2019	2020
1 to 25 Rooms	52%	50%	23%
26 to 50 Rooms	51%	50%	25%
51 to 100 Rooms	53%	52%	28%
101+ Rooms	53%	52%	17%



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 rooms 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=2,819).



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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