

# England Occupancy Survey

March 2020 Results



## Summary of Results

**Room occupancy** declined -38% for March 2020 at 37%, while bedspace occupancy fell -27% compared March 2019 to 25%. There was an increase of +2.2% in room supply while demand fell -49.9% compared to the same month last year.

**RevPar**, which is the total room revenue divided by the total number of available rooms, decreased by -56% in March 2020 when compared to the previous year at £29.95

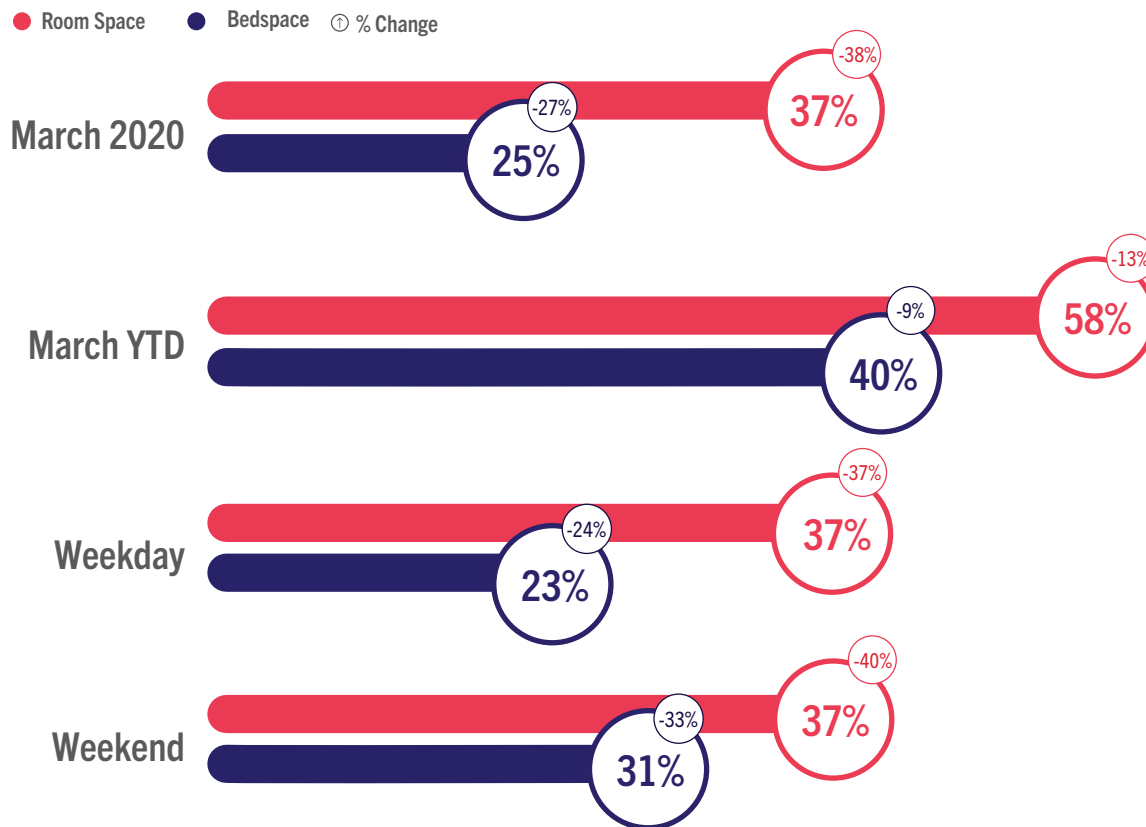
Roomspace occupancy decreased greatly across all **destination types**, largest declines were seen in City/Large town accommodation falling -40% to 36% room occupancy March 2020. Small town occupancy fell -32% to 37%, seaside accommodations decreased -30% to 39% and countryside accommodation decreased -29% compared to the same period last year to 35%

Looking at occupancy by **establishment size**, Larger size establishment with more than 101+ rooms saw the greatest decline in room occupancy down -41% to 36%, while bedspace occupancy fell -29% to 24%. Rooms with 26-50 rooms and 51-100 rooms both decreased -31% in room occupancy to 41%, while those sized 26-50 rooms fell 22% to 29% in bedspace occupancy and those with 51-100 rooms fell 33% to 20% bedspace occupancy. Smaller sizes accommodation with 1-25 rooms fell -31% in roomspace to 41%, and -22% to 29% in bedspace occupancy.

All **regions** saw large declines in room occupancy, with Greater London seeing the largest fall of -49% to 33% and -35% in bedspace to 23%. Room occupancy across all other regions declines between -32% and -34% compared to the same month last year, with the exception of North East England decreasing -29% to 37% room occupancy.

## England Room and Bedspace Occupancy

At a glance - March 2020



\*As of February 2020 occupancy percentage changes are given in absolute terms – see methodology statement (page 16).

## England Room and Bedspace Occupancy

### Data Tables

#### Room Occupancy

	2018	2019	2020
March	75%	73%	37%
March YTD	71%	71%	58%
Weekday	74%	74%	37%
Weekend	76%	77%	37%

#### Bedspace Occupancy

	2018	2019	2020
March	53%	52%	25%
March YTD	50%	50%	40%
Weekday	47%	47%	23%
Weekend	65%	64%	31%

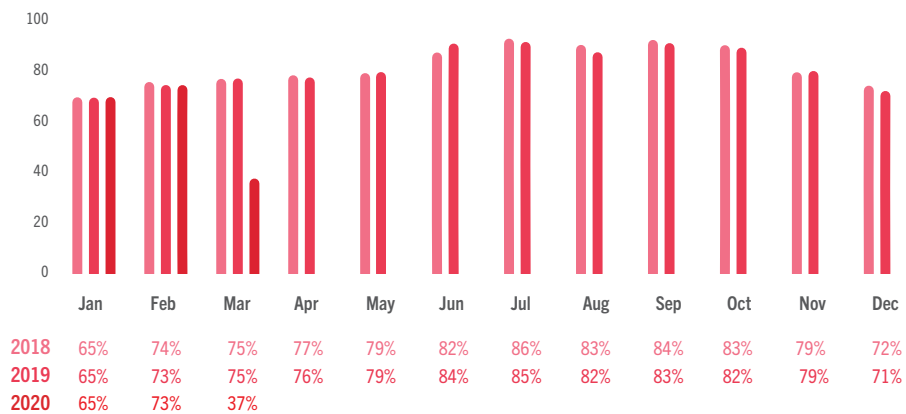
	2018	2019	2020
Room supply	1.6%	2.2%	2.2%
Room demand	1.5%	2.2%	-49.9%

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

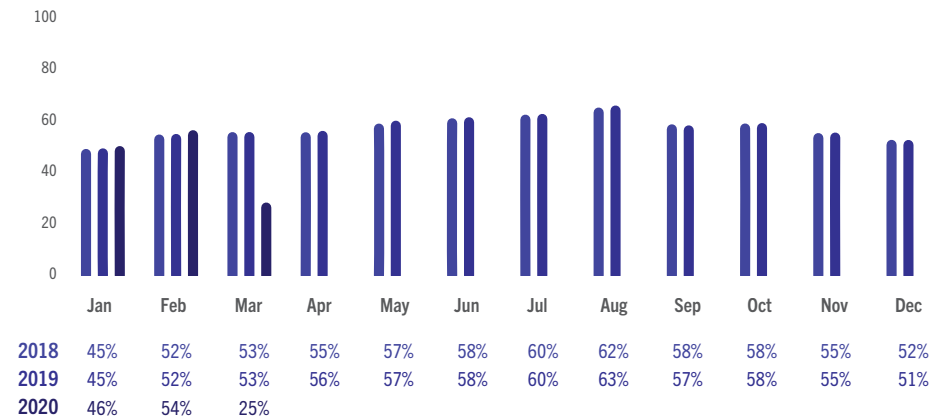


## England Room and Bedspace Occupancy

### Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



## England ADR and RevPAR

At a glance - March 2020

● ADR ● RevPAR ⓘ % Change





## England ADR and RevPAR

Data Tables

### ADR

	2018	2019	2020
March	£90.63	£90.45	£81.78
Weekday	£92.11	£92.46	£81.77
Weekend	£87.60	£86.38	£81.83

### RevPAR

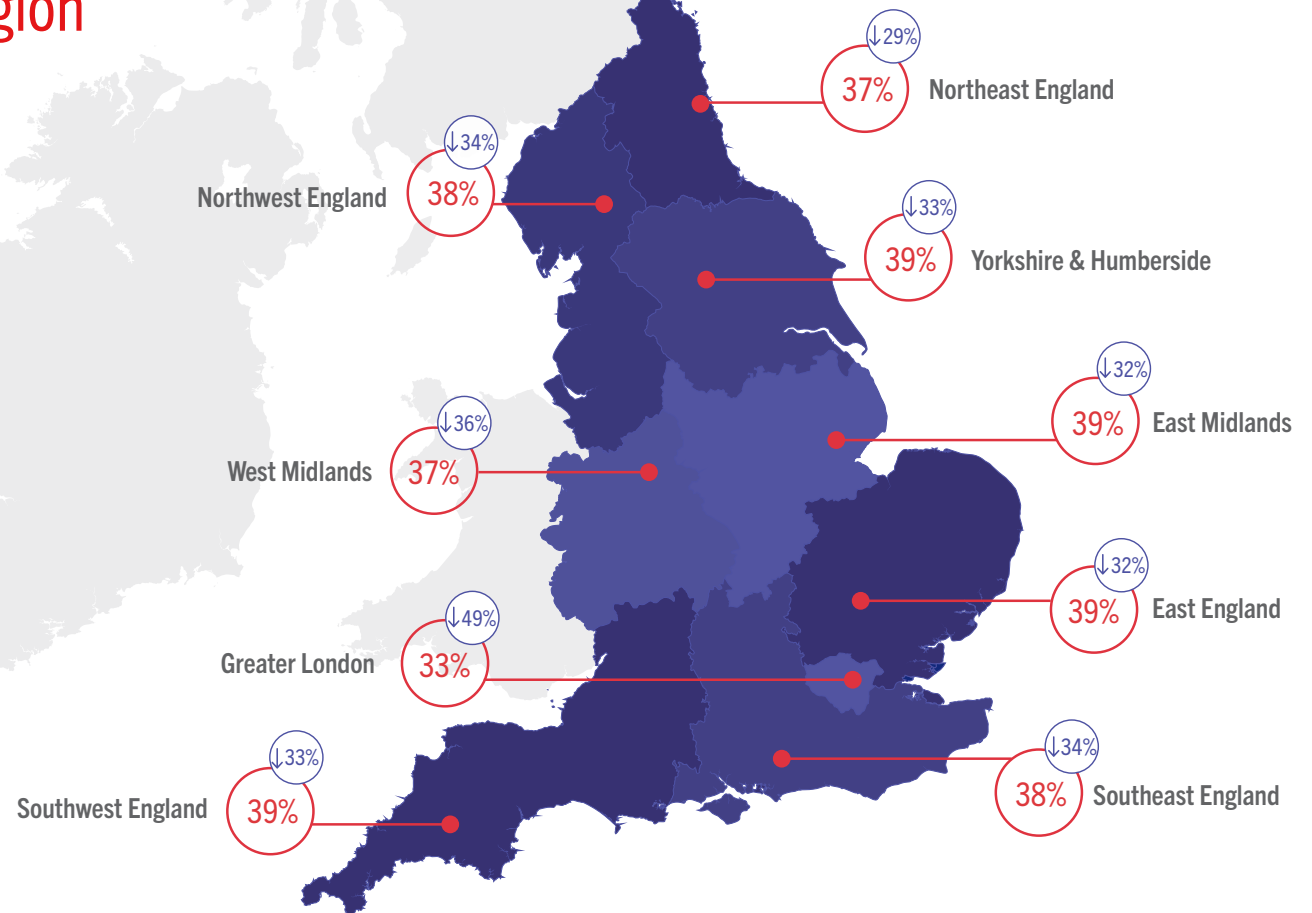
	2018	2019	2020
March	£67.73	£67.60	£29.95
Weekday	£68.20	£68.30	£29.95
Weekend	£66.74	£66.13	£29.98

## Room Occupancy By Region

At a glance - March 2020

\*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	2018	2019	2020
East England	72%	72%	39%
East Midlands	70%	71%	39%
Greater London	80%	82%	33%
Northeast England	67%	66%	37%
Northwest England	74%	73%	38%
Southeast England	73%	72%	38%
Southwest England	71%	72%	39%
West Midlands	76%	73%	37%
Yorkshire & Humberside	69%	72%	39%

Bedspace Occupancy	2018	2019	2020
East England	51%	50%	27%
East Midlands	50%	50%	27%
Greater London	58%	58%	23%
Northeast England	48%	47%	25%
Northwest England	53%	51%	26%
Southeast England	52%	50%	26%
Southwest England	50%	50%	27%
West Midlands	52%	49%	25%
Yorkshire & Humberside	50%	51%	27%

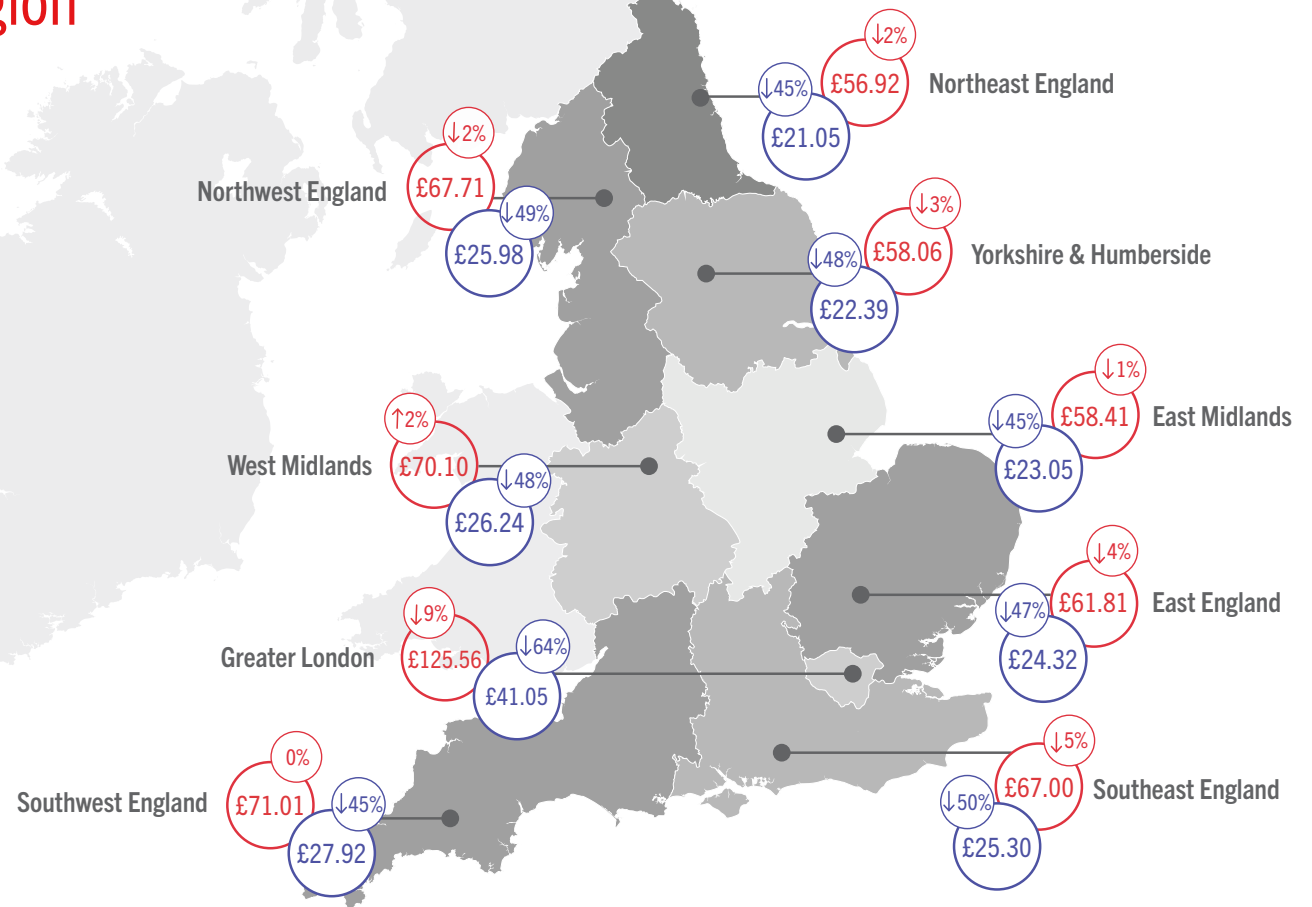


## ADR and RevPAR By Region

At a glance - March 2020

\*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	2018	2019	2020
East England	£66.00	£64.12	£61.81
East Midlands	£60.30	£58.90	£58.41
Greater London	£135.74	£138.05	£125.56
Northeast England	£61.17	£57.87	£56.92
Northwest England	£70.75	£69.41	£67.71
Southeast England	£72.88	£70.24	£67.00
Southwest England	£74.12	£70.99	£71.01
West Midlands	£70.17	£68.59	£70.10
Yorkshire & Humberside	£61.10	£59.97	£58.06

RevPAR	2018	2019	2020
East England	£47.29	£45.85	£24.32
East Midlands	£42.37	£42.07	£23.05
Greater London	£108.68	£112.72	£41.05
Northeast England	£41.28	£38.34	£21.05
Northwest England	£52.42	£50.47	£25.98
Southeast England	£53.44	£50.30	£25.30
Southwest England	£52.62	£51.02	£27.92
West Midlands	£53.37	£50.14	£26.24
Yorkshire & Humberside	£42.18	£42.95	£22.39



## Room Occupancy By Destination Type

At a glance - March 2020



Countryside



Seaside



Small Town



City / Large Town

## Occupancy By Location Type

Data Tables

### Room Occupancy

	2018	2019	2020
City / Large Town	76%	76%	36%
Small Town	70%	69%	37%
Countryside	64%	64%	35%
Seaside	68%	69%	39%

### Bedspace Occupancy

	2018	2019	2020
City / Large Town	54%	53%	25%
Small Town	50%	50%	26%
Countryside	44%	43%	23%
Seaside	51%	50%	28%



## Room Occupancy By Number of Rooms

At a glance - March 2020



1-25 Rooms



26-50 Rooms



51-100 Rooms



101+ Rooms

## Occupancy By Number of Rooms

Data Tables

Room Occupancy	2018	2019	2020
1-25 Rooms	68%	70%	41%
26-50 Rooms	71%	72%	41%
51-100 Rooms	73%	73%	41%
101+ Rooms	76%	76%	36%

Bedspace Occupancy	2018	2019	2020
1-25 Rooms	50%	51%	29%
26-50 Rooms	51%	51%	29%
51-100 Rooms	54%	53%	30%
101+ Rooms	54%	53%	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 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 [hotelinfo@str.com](mailto:hotelinfo@str.com).

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

[str.com](https://str.com)  
+44 (0) 207 922 1930  
[industrydata@str.com](mailto:industrydata@str.com)

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