

England Occupancy Survey

May 2020 Results



Summary of Results

Room occupancy in May 2020 decreased by 56% to 23% whilst bedspace occupancy in May 2020 decreased by 40% to 17% when compared to May 2019. In May, 2020 room supply decreased by 45.5% when compared to May 2019. Meanwhile, demand decreased by 84.3% 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 82% to £13.31 in May 2020 when compared to the same month last year.

Looking at hotel performance across **destination types**, Small Town hotel room occupancy decreased by 63% to 14%. Meanwhile, Seaside hotel room occupancy decreased by 58% to 22% and City / Large Town hotel room occupancy decreased by 55% to 24%. Please note, it is not possible to report on Countryside hotel room occupancy this month due to the low sample size which is a result of few establishments trading during the month.

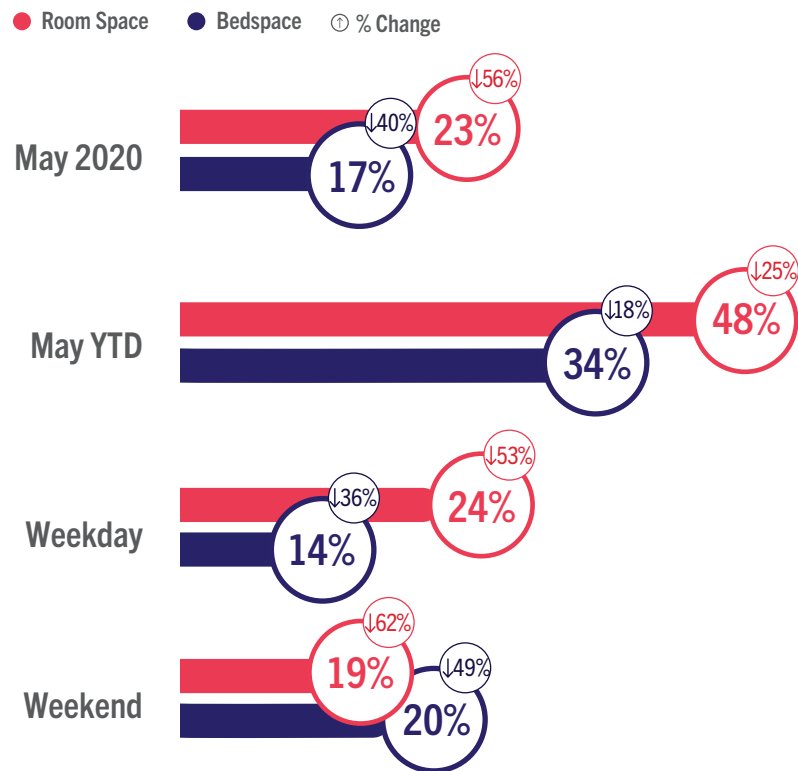
Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased occupancy by 60% to 20%. Meanwhile, hotels with 26 to 50 rooms decreased occupancy by 45% to 29% and those with 51 to 100 rooms decreased occupancy by 43% to 33%. The smallest change from last year was recorded for hotels with 1 to 25 rooms as room occupancy decreased by 37% to 39%.

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 three regions that recorded the greatest change in room occupancy from last year were Northwest England which decreased occupancy by 60% to 18%, Yorkshire & Humberside which decreased occupancy by 59% to 16% and Greater London which decreased occupancy by 58% to 24%.

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

England Room and Bedspace Occupancy

At a glance - May 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.

England Room and Bedspace Occupancy

Data Tables

Room Occupancy	2018	2019	2020
May	79%	79%	23%
May YTD	74%	73%	48%
Weekday	78%	78%	24%
Weekend	82%	80%	19%

Bedspace Occupancy	2018	2019	2020
May	56%	57%	17%
May YTD	52%	52%	34%
Weekday	50%	50%	14%
Weekend	68%	68%	20%

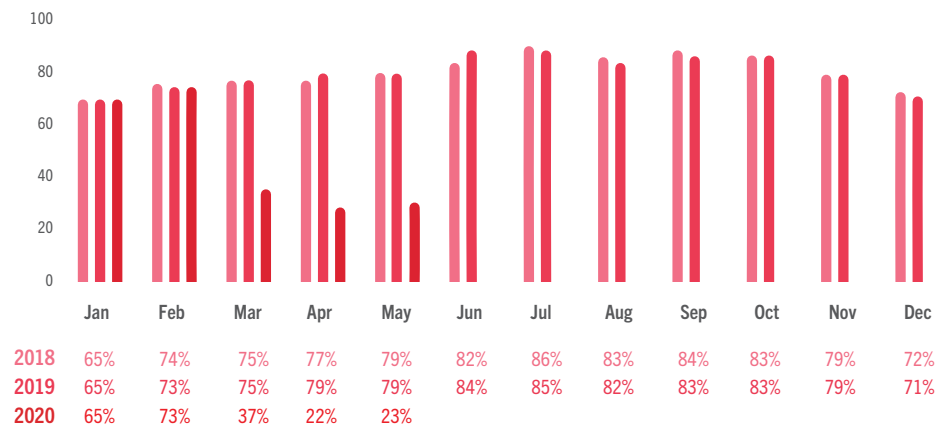
	2018	2019	2020
Room supply	1.4%	2.2%	-45.5%
Room demand	1.5%	1.5%	-84.3%

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

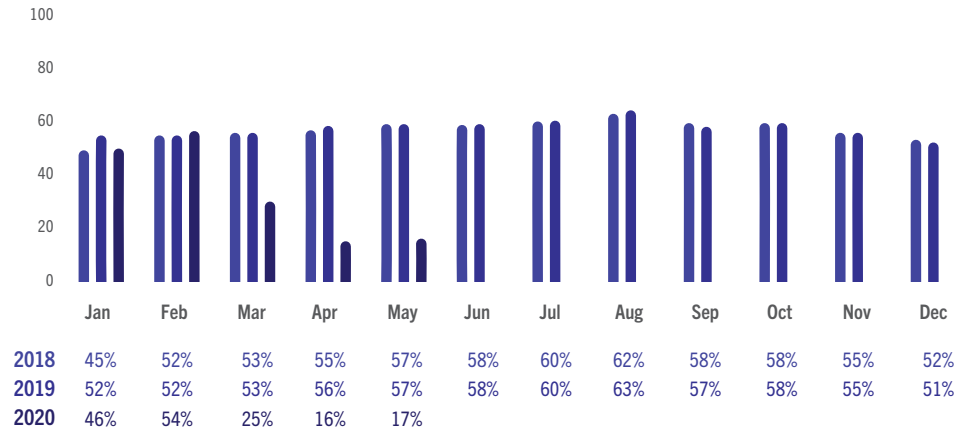


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - May 2020

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2018	2019	2020
May	£95.37	£95.74	£58.75
Weekday	£95.43	£96.68	£57.84
Weekend	£95.19	£93.52	£61.23

RevPAR

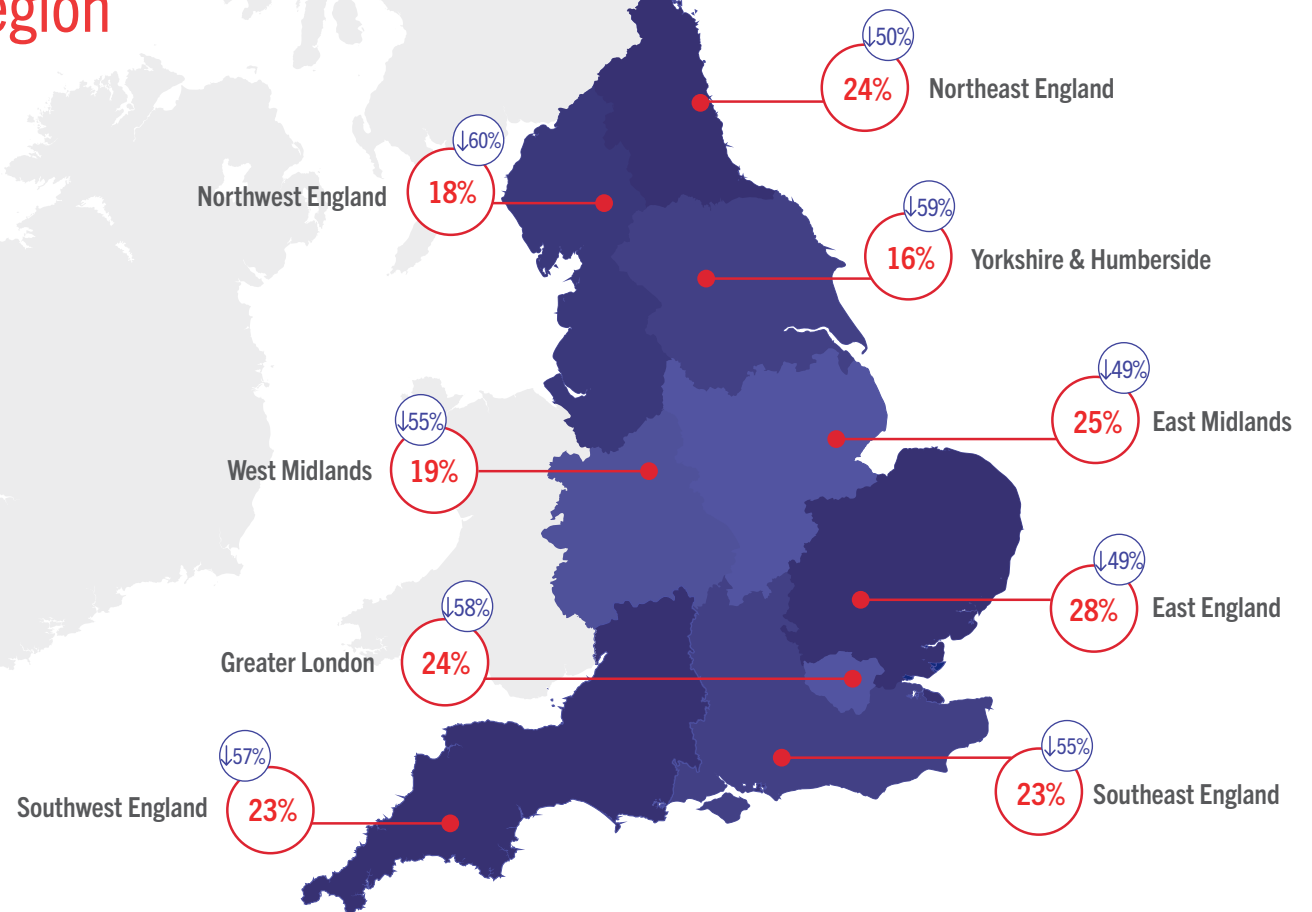
	2018	2019	2020
May	£75.44	£75.21	£13.31
Weekday	£74.42	£75.18	£14.16
Weekend	£78.37	£75.28	£11.52



Room Occupancy By Region

At a glance - May 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	78%	78%	28%
East Midlands	74%	74%	25%
Greater London	82%	82%	24%
Northeast England	73%	74%	24%
Northwest England	77%	78%	18%
Southeast England	80%	79%	23%
Southwest England	81%	80%	23%
West Midlands	75%	75%	19%
Yorkshire & Humberside	74%	76%	16%

Bedspace Occupancy	2018	2019	2020
East England	56%	56%	21%
East Midlands	53%	54%	18%
Greater London	60%	60%	17%
Northeast England	52%	53%	17%
Northwest England	55%	56%	13%
Southeast England	57%	56%	17%
Southwest England	57%	58%	17%
West Midlands	51%	52%	14%
Yorkshire & Humberside	54%	55%	12%

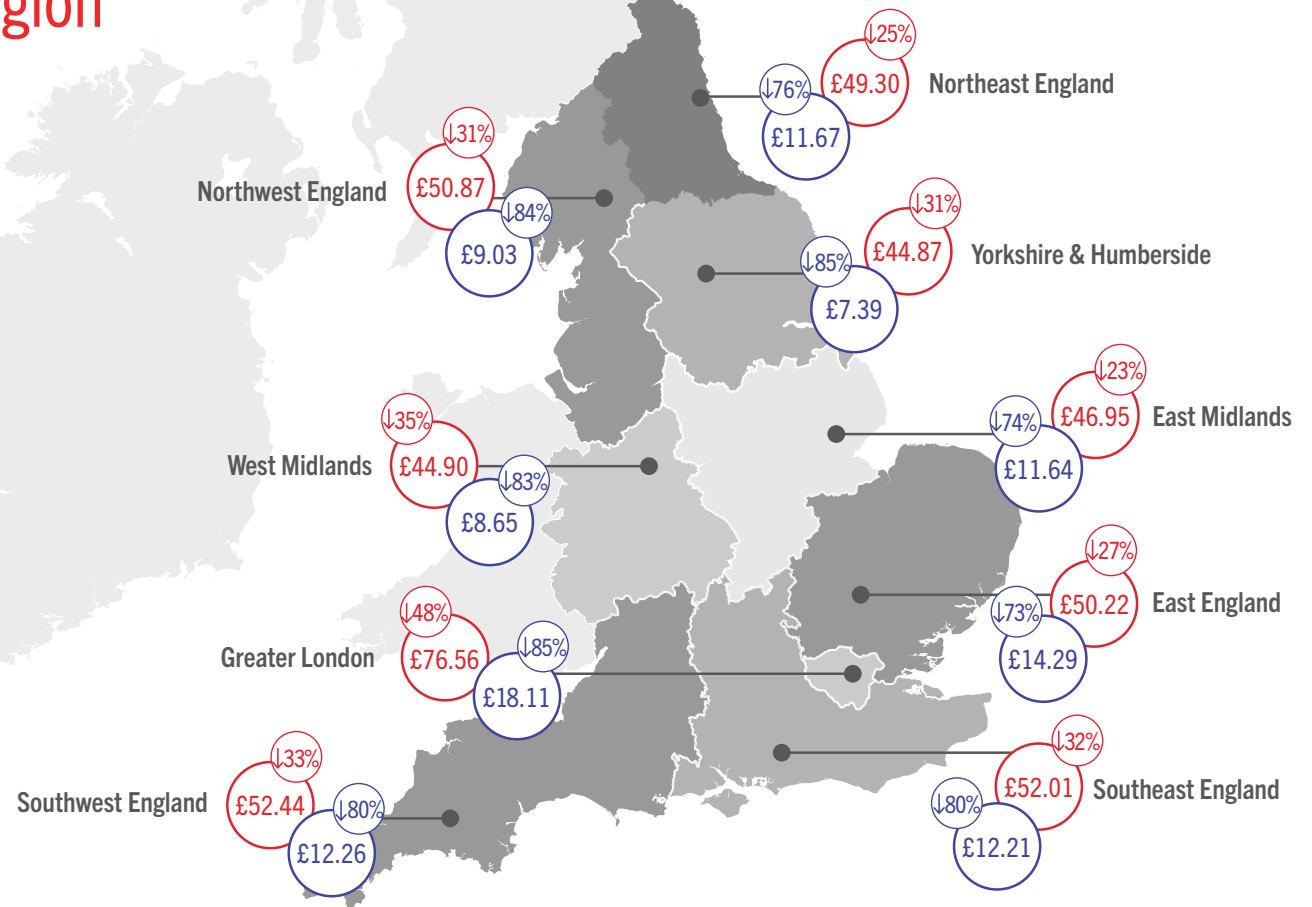


ADR and RevPAR By Region

At a glance - May 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	£69.40	£68.77	£50.22
East Midlands	£62.24	£61.36	£46.95
Greater London	£145.23	£148.00	£76.56
Northeast England	£62.67	£65.62	£49.30
Northwest England	£72.82	£74.15	£50.87
Southeast England	£78.92	£76.47	£52.01
Southwest England	£78.52	£77.84	£52.44
West Midlands	£68.18	£69.04	£44.90
Yorkshire & Humberside	£65.10	£64.64	£44.87

RevPAR	2018	2019	2020
East England	£54.13	£53.41	£14.29
East Midlands	£46.33	£45.26	£11.64
Greater London	£119.71	£120.75	£18.11
Northeast England	£46.02	£48.54	£11.67
Northwest England	£56.09	£57.56	£9.03
Southeast England	£63.51	£60.09	£12.21
Southwest England	£63.34	£62.65	£12.26
West Midlands	£51.24	£51.58	£8.65
Yorkshire & Humberside	£48.48	£48.94	£7.39

Room Occupancy By Destination Type

At a glance - May 2020



*Please note: Due to insufficient sample in May 2020, Countryside data cannot be reported on.

**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	79%	79%	24%
Small Town	77%	77%	14%
Countryside	73%	74%	N/A
Seaside	79%	80%	22%

Bedspace Occupancy

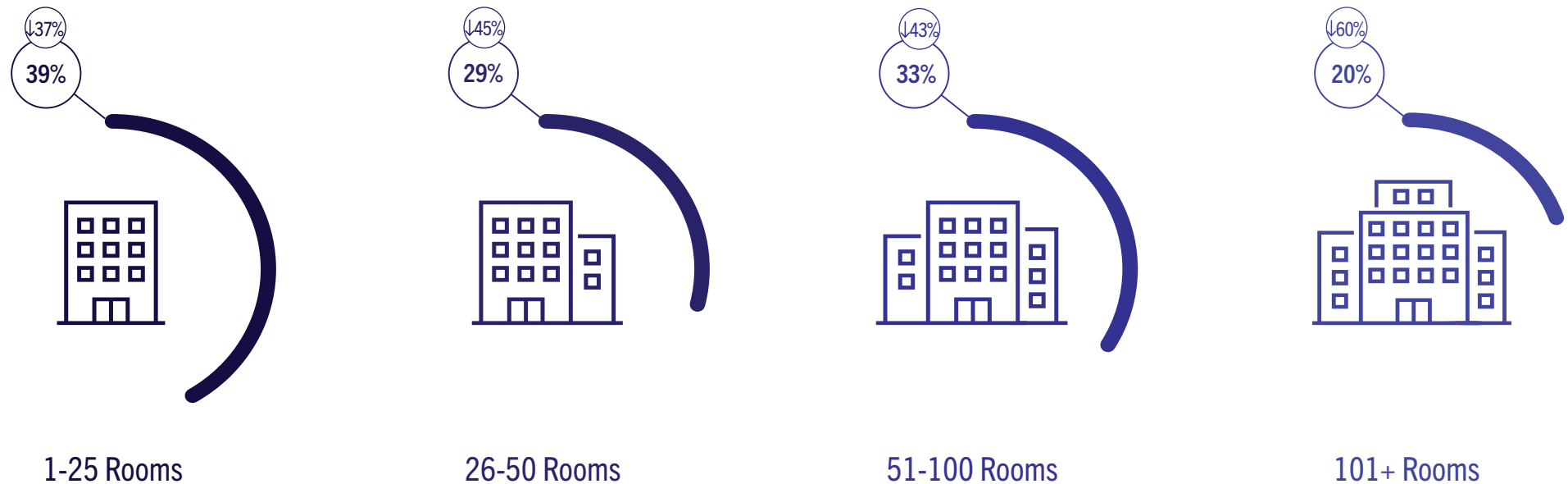
	2018	2019	2020
City / Large Town	56%	56%	17%
Small Town	56%	56%	10%
Countryside	50%	52%	N/A
Seaside	60%	61%	17%

*Please note: Due to insufficient sample in May 2020, Countryside data cannot be reported on.



Room Occupancy By Number of Rooms

At a glance - May 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	74%	76%	39%
26 to 50 Rooms	76%	74%	29%
51 to 100 Rooms	76%	76%	33%
101+ Rooms	80%	80%	20%

Bedspace Occupancy	2018	2019	2020
1 to 25 Rooms	54%	56%	29%
26 to 50 Rooms	55%	54%	22%
51 to 100 Rooms	56%	57%	25%
101+ Rooms	57%	57%	14%



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=679).



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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