

# England Occupancy Survey

April 2020 Results



## Summary of Results

**Room occupancy** declined -54% for April 2020 to 22%, while bedspace occupancy fell -40% compared April 2019 to 16%. There was a decline of -49.4% in room supply while demand fell -85.5% compared to the same month last year.

**RevPar**, which is the total room revenue divided by the total number of available rooms, decreased by -79% in April 2020 when compared to the previous year to stand at £14.52.

Room occupancy decreased across all **destination types**, with the largest declines seen in City/Large town accommodation falling -53% to 23% occupancy compared to April 2020. Room occupancy in small town locations declined -62% to 10%, while seaside accommodation experienced an occupancy fall of decreased -61% to 18% compared to this month last year. It has not been possible to collect data on this metric for countryside accommodation due to the low base size of trading establishments.

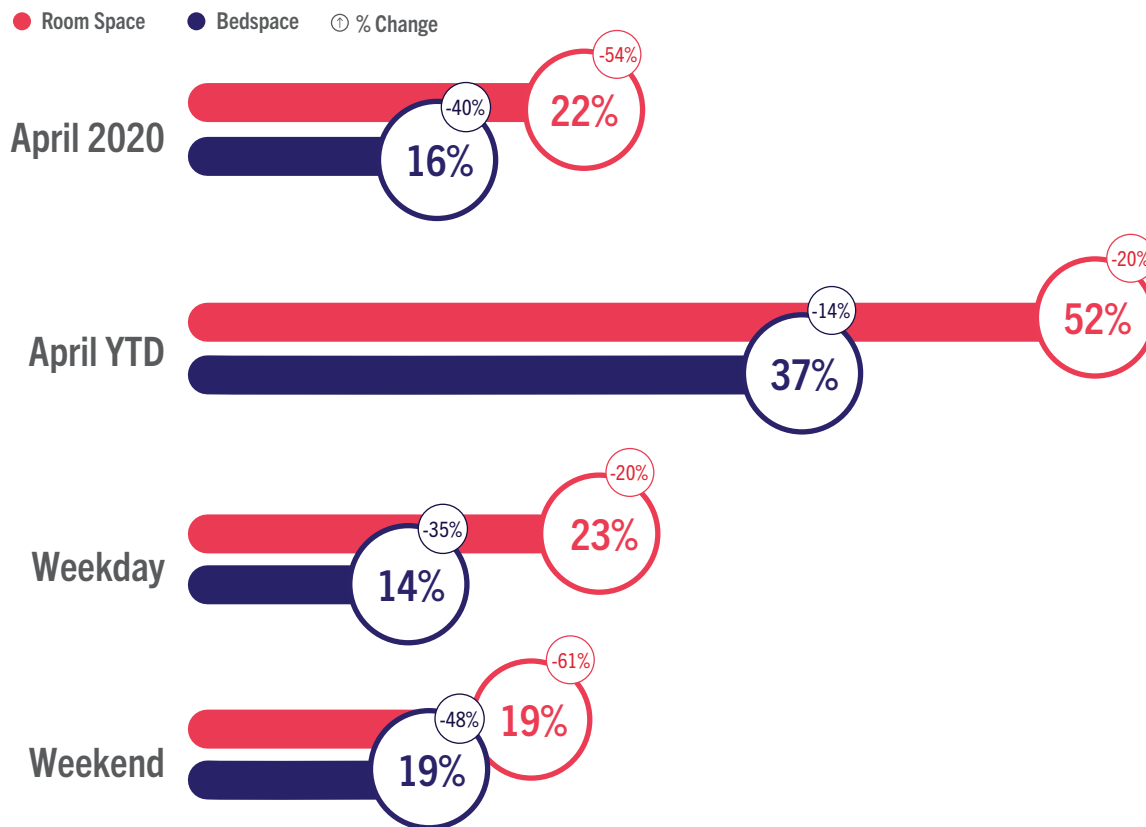
Looking at room occupancy by **establishment size**, larger hotels with more than 101+ rooms experienced the greatest decline, down -58% to 20% versus this month last year, while bedspace occupancy fell -42% to 14%. Establishments with 51-100 rooms and 26-50 rooms both had a -42% fall in room occupancy to 32% and 29% respectively. Smaller hotel accommodation with 1-25 rooms experienced a decline of -32% in room occupancy to 39%, and a -24% fall in bedspace occupancy to 29%.

All regions saw declines in room occupancy exceeding -50% compared to April last year, with the exception of East England, down -47 and East Midlands at -49. Greater London experienced the largest fall of -58% which equates to a room occupancy of 23%. However, the region with the lowest room occupancy is the West Midlands at 17%.

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 - April 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
April	77%	76%	22%
April YTD	72%	72%	52%
Weekday	76%	75%	23%
Weekend	80%	80%	19%

Bedspace Occupancy	2018	2019	2020
April	55%	56%	16%
April YTD	51%	51%	37%
Weekday	50%	50%	14%
Weekend	67%	67%	19%

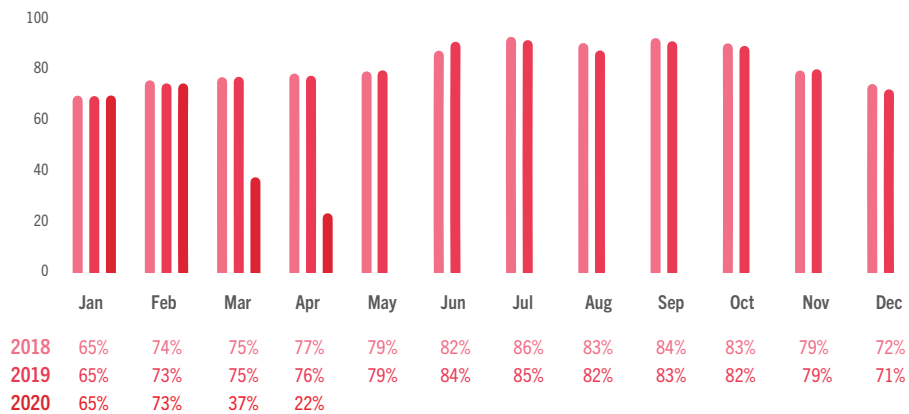
	2018	2019	2020
Room supply	1.5%	2.3%	-49.4%
Room demand	0.6%	1.2%	-85.5%

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

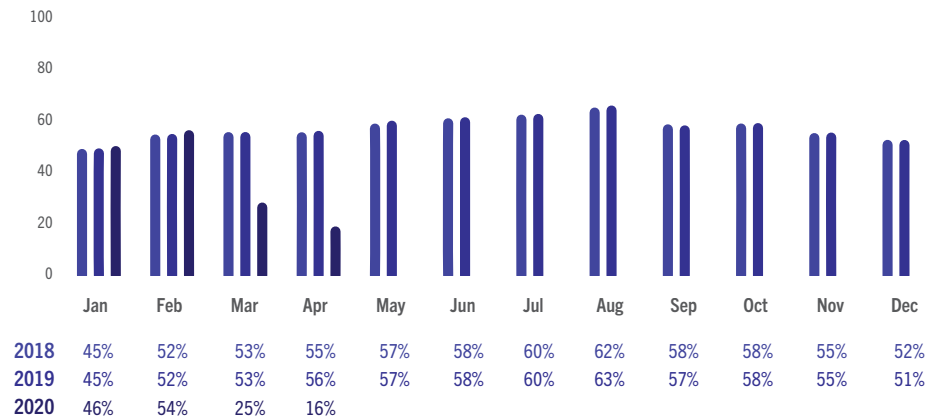


## England Room and Bedspace Occupancy

### Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



## England ADR and RevPAR

At a glance - April 2020

● ADR ● RevPAR ⓘ % Change





## England ADR and RevPAR

Data Tables

### ADR

	2018	2019	2020
April	£92.12	£92.06	£66.55
Weekday	£92.21	£92.02	£65.53
Weekend	£91.89	£92.14	£69.86

### RevPAR

	2018	2019	2020
April	£70.87	£70.05	£14.52
Weekday	£70.03	£68.61	£14.86
Weekend	£73.19	£74.00	£13.57

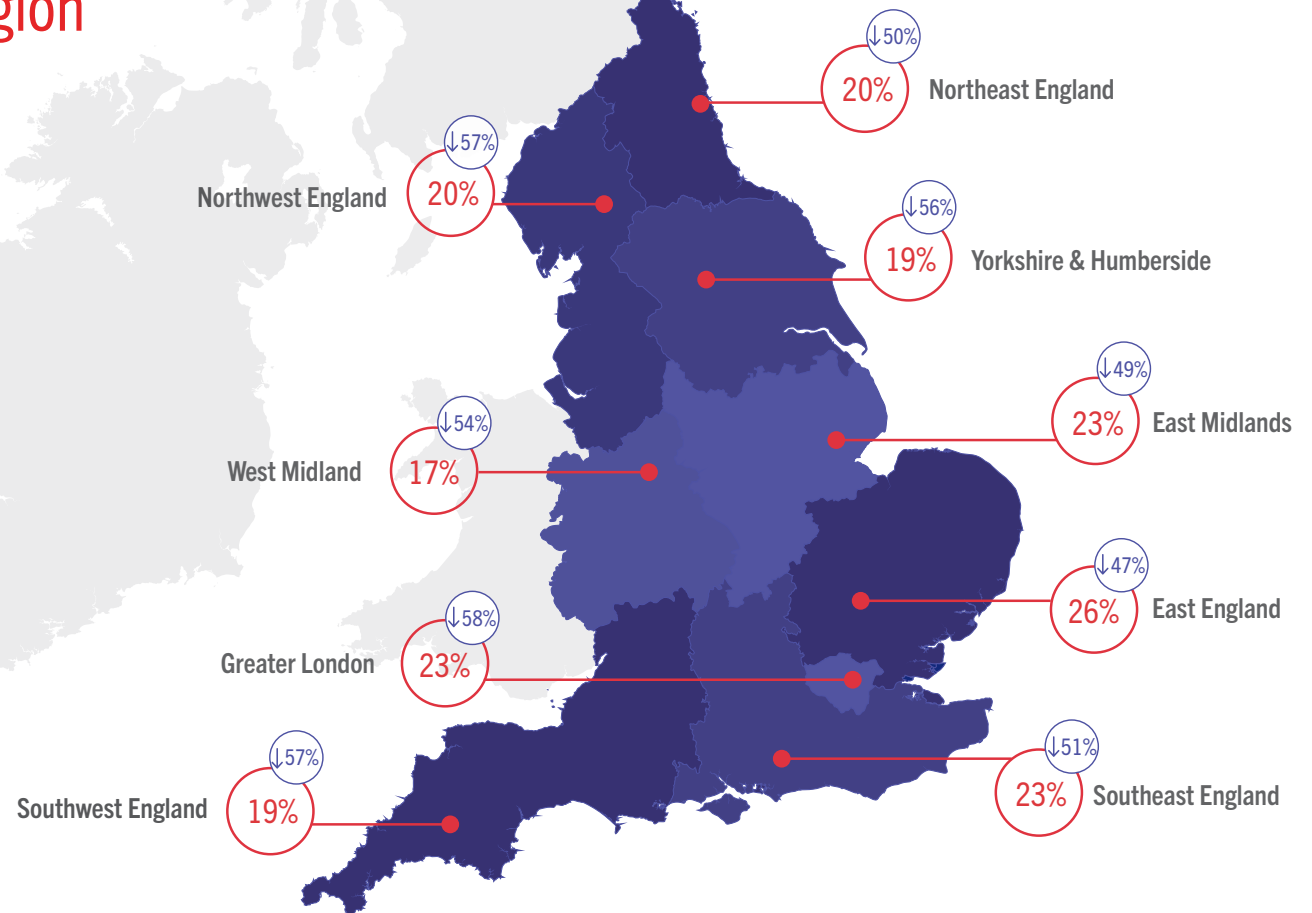


## Room Occupancy By Region

At a glance - April 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	74%	74%	26%
East Midlands	74%	72%	23%
Greater London	82%	81%	23%
Northeast England	70%	69%	20%
Northwest England	77%	76%	20%
Southeast England	75%	74%	23%
Southwest England	76%	76%	19%
West Midlands	73%	71%	17%
Yorkshire & Humberside	73%	75%	19%

Bedspace Occupancy	2018	2019	2020
East England	53%	54%	19%
East Midlands	53%	53%	17%
Greater London	61%	60%	17%
Northeast England	50%	50%	14%
Northwest England	56%	56%	15%
Southeast England	54%	54%	17%
Southwest England	54%	55%	13%
West Midlands	50%	49%	12%
Yorkshire & Humberside	53%	55%	14%

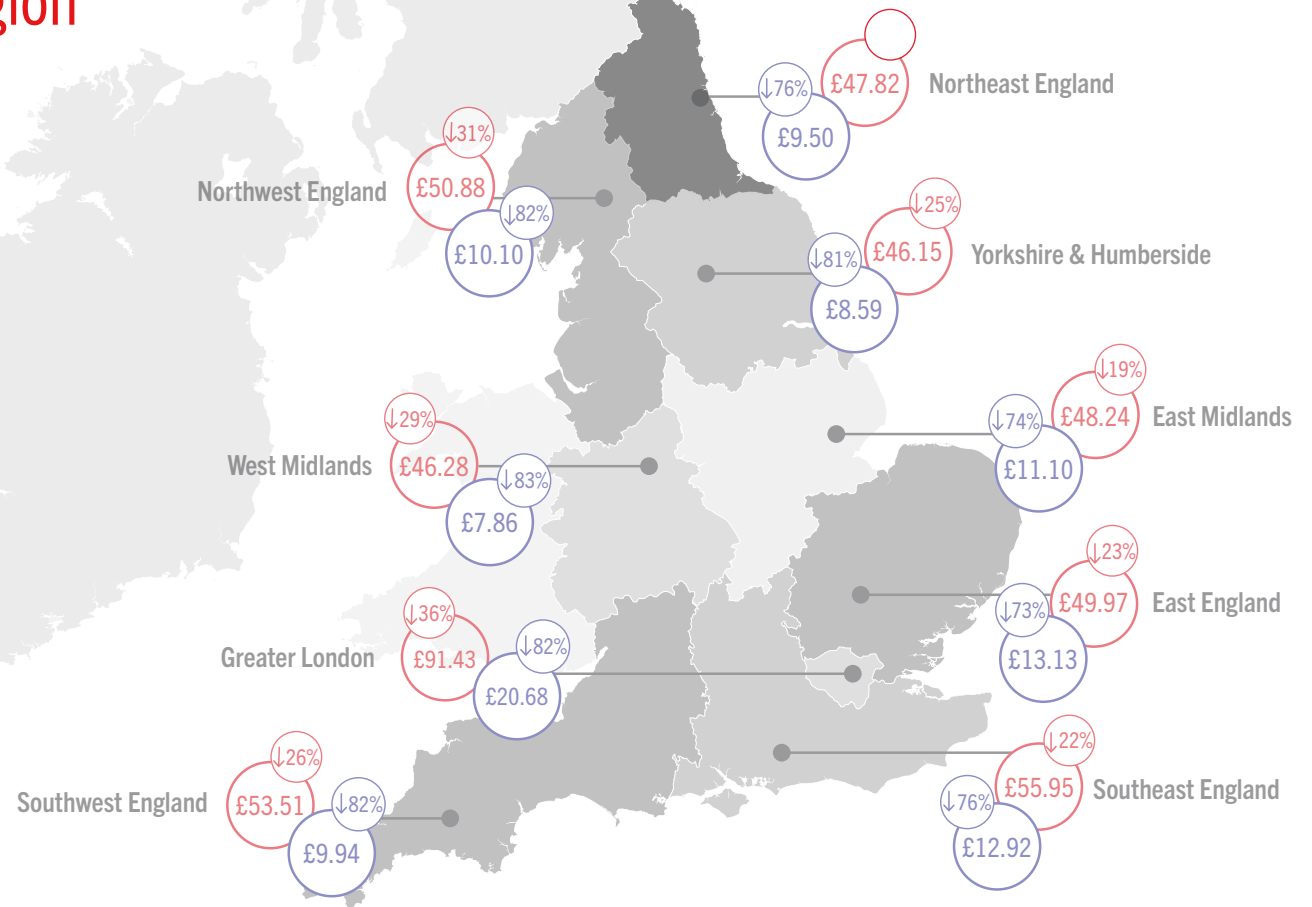


## ADR and RevPAR By Region

At a glance - April 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	£65.90	£65.24	£49.97
East Midlands	£60.68	£59.49	£48.24
Greater London	£140.38	£142.18	£91.43
Northeast England	£59.88	£58.07	£47.82
Northwest England	£72.83	£73.54	£50.88
Southeast England	£73.22	£72.17	£55.95
Southwest England	£72.20	£71.95	£53.51
West Midlands	£67.56	£64.86	£46.28
Yorkshire & Humberside	£62.05	£61.74	£46.15

RevPAR	2018	2019	2020
East England	£48.58	£48.03	£13.13
East Midlands	£44.84	£43.00	£11.10
Greater London	£115.55	£115.15	£20.68
Northeast England	£41.82	£40.35	£9.50
Northwest England	£56.29	£56.17	£10.10
Southeast England	£54.71	£53.52	£12.92
Southwest England	£55.12	£54.59	£9.94
West Midlands	£49.26	£45.73	£7.86
Yorkshire & Humberside	£45.39	£46.26	£8.59

## Room Occupancy By Destination Type

At a glance - April 2020



Countryside



Seaside



Small Town



City / Large Town

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

\*\*Due to insufficient sample in April, Countryside data cannot be reported on.

## Occupancy By Location Type

### Data Tables

#### Room Occupancy

	2018	2019	2020
City / Large Town	78%	77%	23%
Small Town	72%	73%	10%
Countryside	68%	68%	N/A
Seaside	77%	78%	18%

#### Bedspace Occupancy

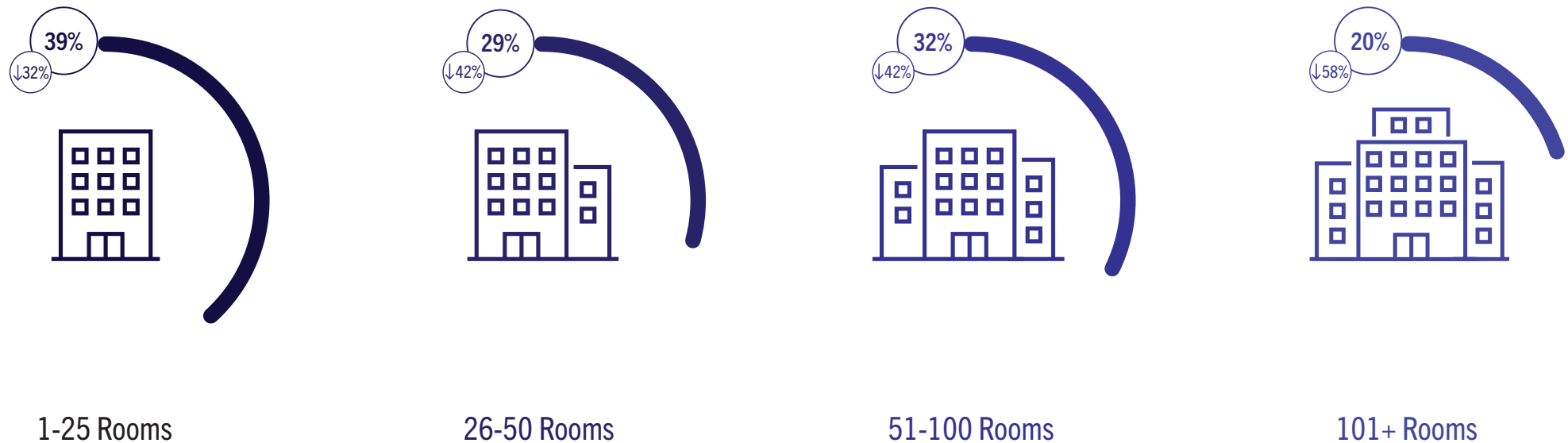
	2018	2019	2020
City / Large Town	55%	55%	17%
Small Town	53%	54%	8%
Countryside	47%	48%	N/A
Seaside	60%	62%	14%

\*Due to insufficient sample in April, Countryside data cannot be reported on.



## Room Occupancy By Number of Rooms

At a glance - April 2020



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

## Occupancy By Number of Rooms

Data Tables

Room Occupancy	2018	2019	2020
1-25 Rooms	71%	71%	39%
26-50 Rooms	72%	72%	29%
51-100 Rooms	73%	74%	32%
101+ Rooms	77%	77%	20%

Bedspace Occupancy	2018	2019	2020
1-25 Rooms	53%	53%	29%
26-50 Rooms	52%	53%	22%
51-100 Rooms	55%	56%	24%
101+ Rooms	55%	56%	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 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.

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=582).





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)

**Benchmarking**  
↑ your world