

England Occupancy Survey

July 2020 Results



Summary of Results

Room occupancy in July 2020 decreased by 56% to 29% whilst bedspace occupancy in July 2020 decreased by 39% to 21% when compared to July 2019. In July 2020, room supply decreased by 12.2% when compared to July 2019. Meanwhile, room demand decreased by 70.2% 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 79% to £19.33 in July 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 58% to 27% followed by Small Town hotel occupancy which decreased by 52% to 32% and Countryside hotel occupancy which decreased by 43% to 36%. The smallest change from last year was recorded for Seaside hotels as occupancy decreased by 39% to 47%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased the most by 61% to 25% followed by hotels with 51 to 100 rooms which decreased occupancy by 47% to 36% and hotels with 26 to 50 rooms which decreased occupancy by 45% to 38%. The smallest change from last year was recorded for hotels with 1 to 25 rooms as occupancy decreased by 42% to 41%.

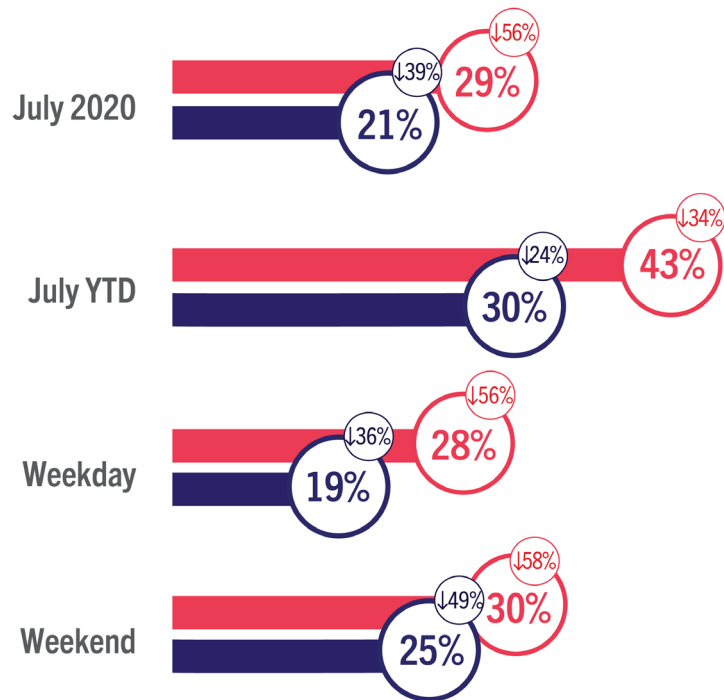
Evaluating trends across the 9 **regions** of England, 0 regions achieved increased room occupancy whilst 9 regions achieved decreased room occupancy compared to the same month last year. The three regions that recorded the greatest change in room occupancy from last year were Greater London which decreased occupancy by 70% to 20%, Southeast England which decreased occupancy by 55% to 31% and Northwest England which decreased occupancy by 53% to 30%.

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

England Room and Bedspace Occupancy

At a glance - July 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
July	85%	85%	29%
July YTD	77%	77%	43%
Weekday	84%	84%	28%
Weekend	89%	88%	30%

Bedspace Occupancy

	2018	2019	2020
July	60%	60%	21%
July YTD	54%	54%	30%
Weekday	55%	55%	19%
Weekend	75%	74%	25%

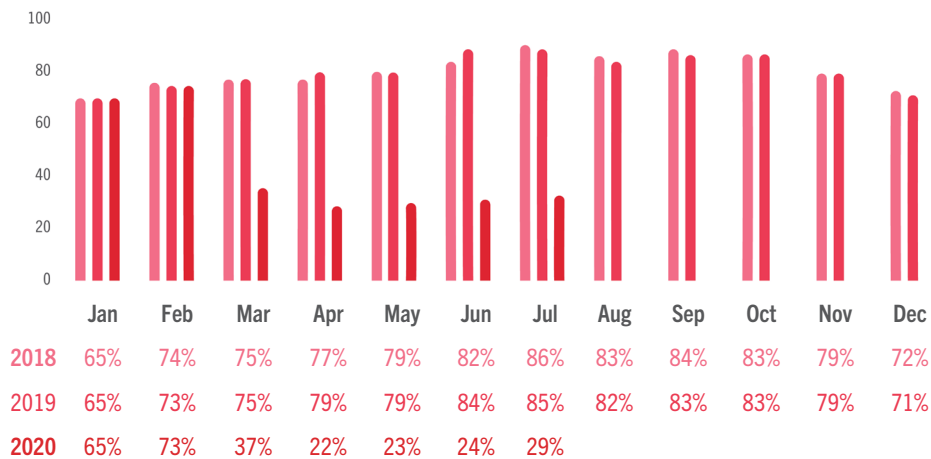
	2018	2019	2020
Room Supply	1.5%	2.3%	-12.2%
Room Demand	3.0%	2.0%	-70.2%

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

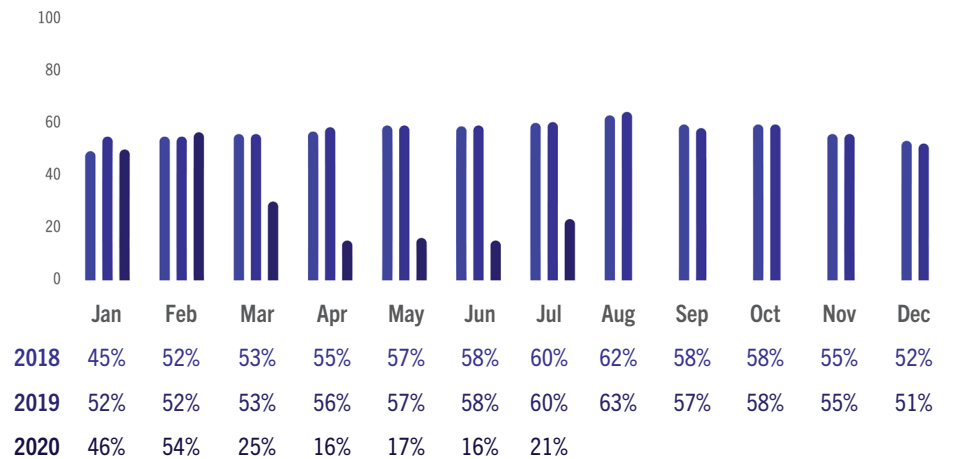


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



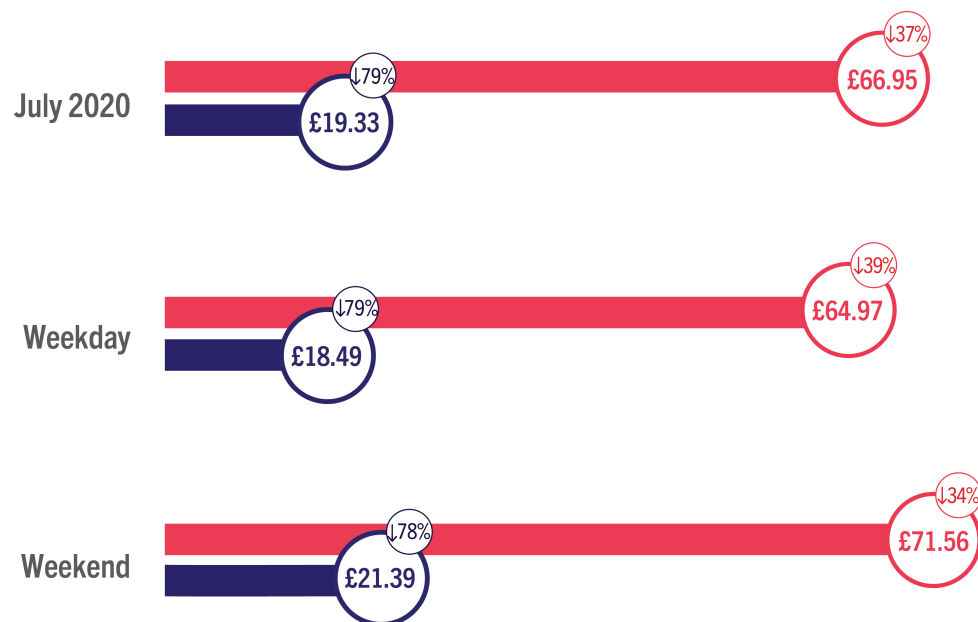
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - July 2020

● ADR ● RevPAR ⓘ % Change



England ADR and RevPAR

Data Tables

ADR

	2018	2019	2020
July	£106.45	£107.06	£66.95
Weekday	£106.01	£106.50	£64.97
Weekend	£107.64	£108.58	£71.56

RevPAR

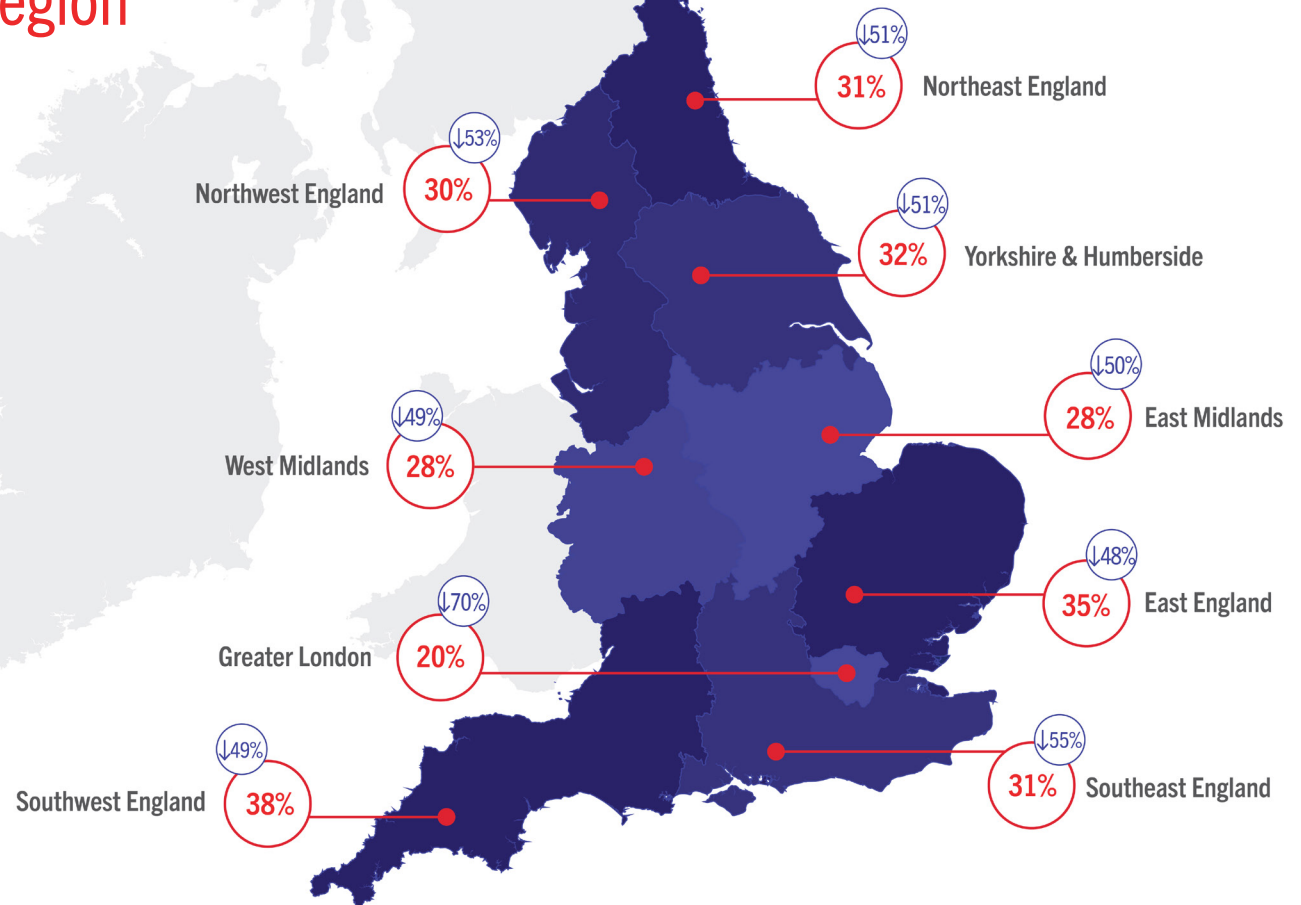
	2018	2019	2020
July	£90.96	£91.23	£19.33
Weekday	£89.35	£89.79	£18.49
Weekend	£95.60	£95.37	£21.39



Room Occupancy By Region

At a glance - July 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	84%	83%	35%
East Midlands	77%	78%	28%
Greater London	91%	90%	20%
Northeast England	80%	82%	31%
Northwest England	83%	83%	30%
Southeast England	88%	86%	31%
Southwest England	87%	87%	38%
West Midlands	76%	77%	28%
Yorkshire & Humberside	80%	82%	32%

Bedspace Occupancy

	2018	2019	2020
East England	59%	58%	25%
East Midlands	54%	54%	20%
Greater London	66%	65%	15%
Northeast England	56%	58%	22%
Northwest England	59%	58%	21%
Southeast England	62%	60%	22%
Southwest England	60%	60%	27%
West Midlands	51%	51%	19%
Yorkshire & Humberside	57%	58%	23%

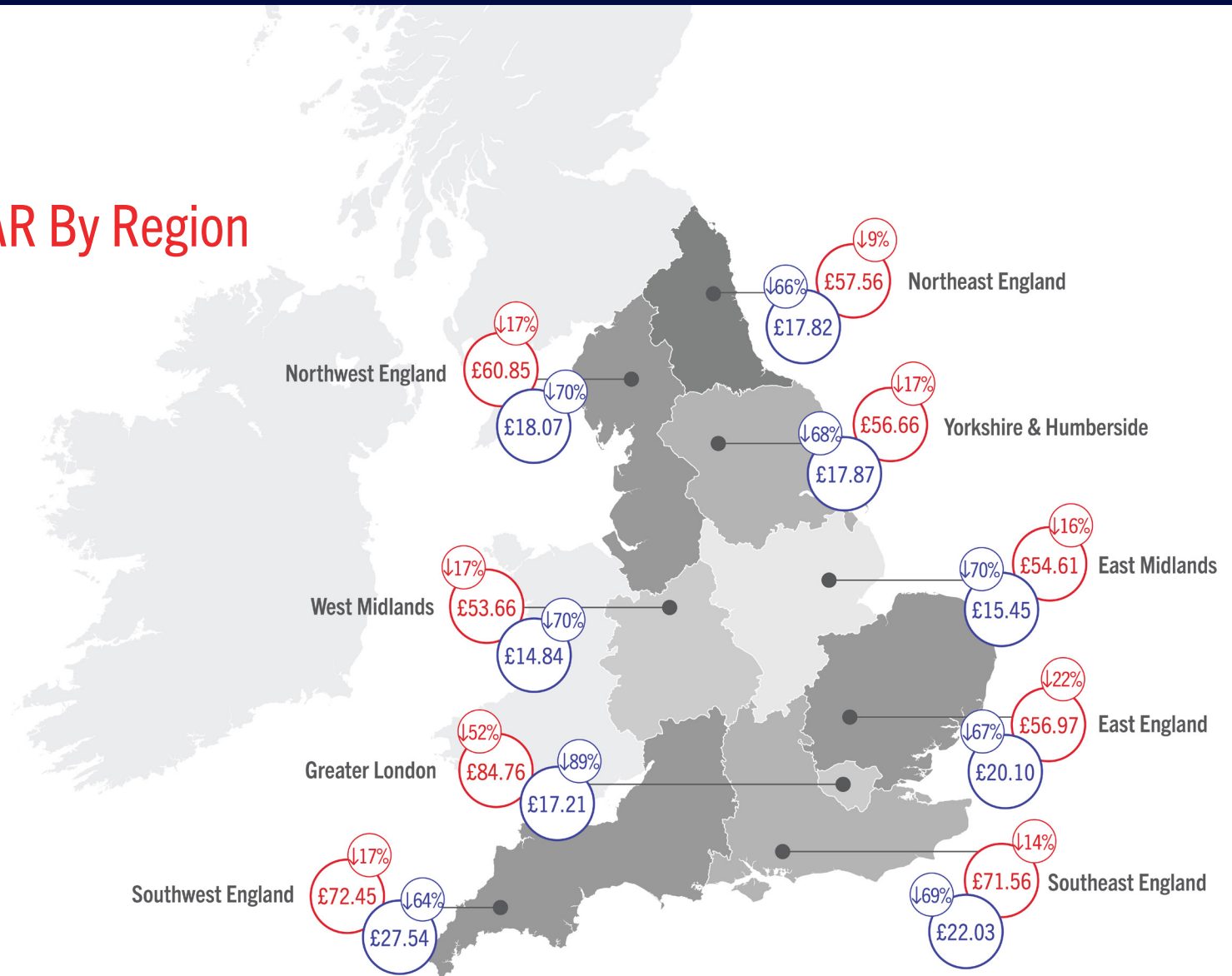


ADR and RevPAR By Region

At a glance - July 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	£73.84	£73.43	£56.97
East Midlands	£64.58	£65.08	£54.61
Greater London	£169.44	£175.00	£84.76
Northeast England	£62.23	£63.26	£57.56
Northwest England	£70.70	£73.19	£60.85
Southeast England	£87.72	£82.75	£71.56
Southwest England	£90.07	£87.70	£72.45
West Midlands	£64.19	£64.72	£53.66
Yorkshire & Humberside	£67.07	£67.91	£56.66

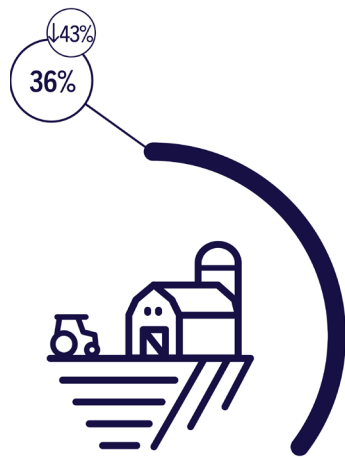
RevPAR

	2018	2019	2020
East England	£61.70	£61.13	£20.10
East Midlands	£49.96	£51.03	£15.45
Greater London	£154.30	£157.96	£17.21
Northeast England	£49.91	£52.16	£17.82
Northwest England	£58.47	£60.56	£18.07
Southeast England	£76.89	£71.00	£22.03
Southwest England	£78.08	£76.44	£27.54
West Midlands	£48.91	£49.59	£14.84
Yorkshire & Humberside	£53.46	£55.90	£17.87



Room Occupancy By Destination Type

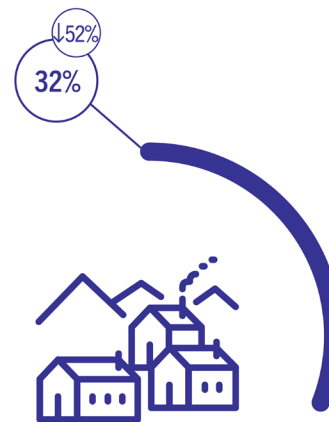
At a glance - July 2020



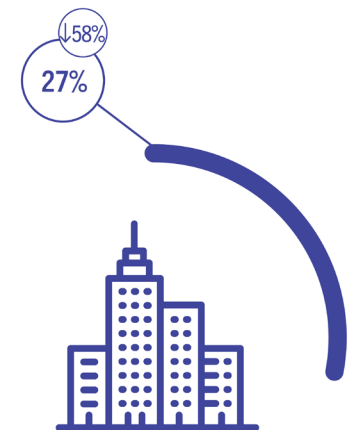
Countryside



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	86%	86%	27%
Small Town	83%	83%	32%
Countryside	78%	79%	36%
Seaside	87%	87%	47%

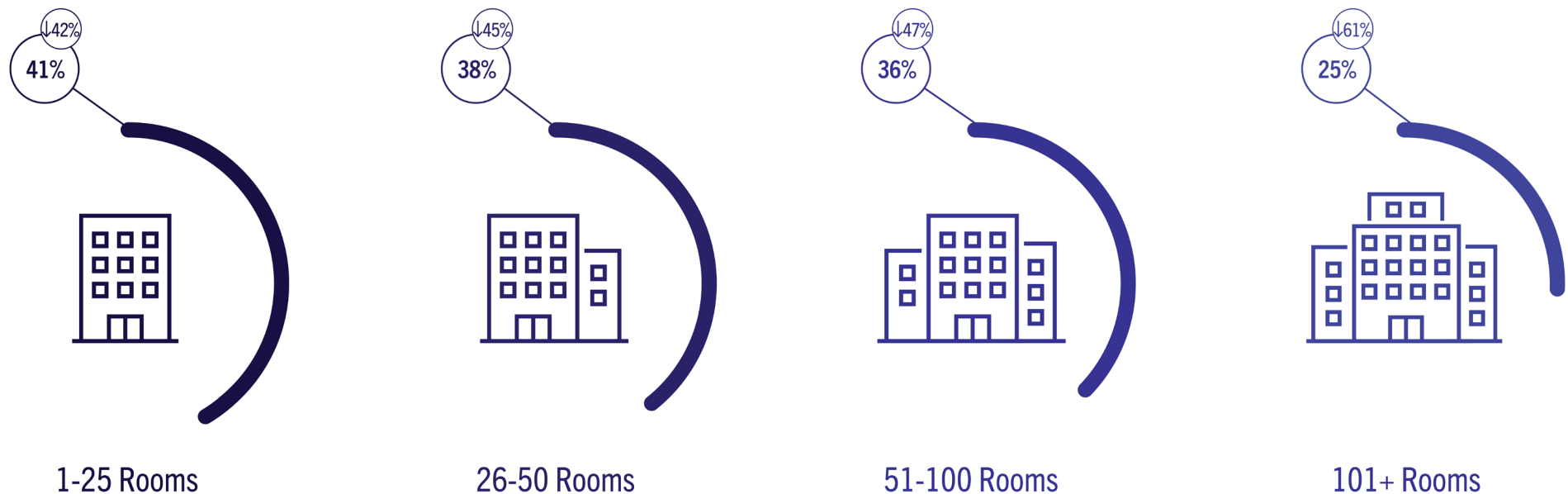
Bedspace Occupancy

	2018	2019	2020
City / Large Town	60%	59%	19%
Small Town	60%	60%	23%
Countryside	53%	54%	25%
Seaside	66%	65%	36%



Room Occupancy By Number of Rooms

At a glance - July 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	81%	83%	41%
26 to 50 Rooms	83%	83%	38%
51 to 100 Rooms	83%	83%	36%
101+ Rooms	86%	86%	25%

Bedspace Occupancy

	2018	2019	2020
1 to 25 Rooms	59%	60%	30%
26 to 50 Rooms	59%	59%	27%
51 to 100 Rooms	61%	61%	27%
101+ Rooms	61%	60%	18%



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=2,507).



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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