

# England Occupancy Survey

September 2020 Results



## Summary of Results

**Room occupancy** in September 2020 decreased by 38% to 46% whilst bedspace occupancy in September 2020 decreased by 26% to 31% when compared to September 2019. In September 2020, room supply decreased by 5.1% when compared to September 2019. Meanwhile, room demand decreased by 48.0% 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 63% to £31.66 in September 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 41% to 42% followed by Small Town hotel occupancy which decreased by 28% to 53% and Countryside hotel occupancy which decreased by 15% to 64%. The smallest change from last year was recorded for Seaside hotels as occupancy decreased by 9% to 76%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased the most by 46% to 38% followed by hotels with 1 to 25 rooms which decreased occupancy by 23% to 56% and hotels with 51 to 100 rooms which decreased occupancy by 22% to 60%. The smallest change from last year was recorded for hotels with 26 to 50 rooms as occupancy decreased by 19% to 62%.

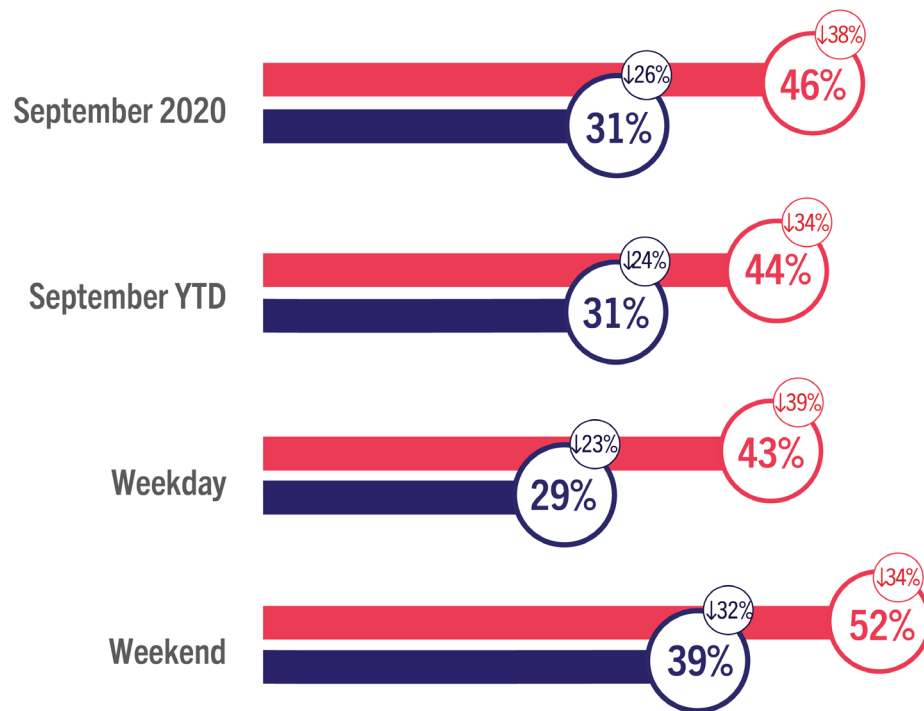
Evaluating trends across the **9 regions** of England, 0 regions achieved increased room occupancy whilst 9 regions achieved decreased room occupancy compared to the same month last year. The four regions that recorded the greatest change in room occupancy from last year were Greater London which decreased occupancy by 58% to 29%, West Midlands which decreased occupancy by 38% to 41%, Southeast England which decreased occupancy by 35% to 48% and Northwest England which decreased occupancy by 33% to 48%.

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

## England Room and Bedspace Occupancy

At a glance - September 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
September	84%	83%	46%
September YTD	78%	78%	44%
Weekday	82%	82%	43%
Weekend	86%	86%	52%

#### Bedspace Occupancy

	2018	2019	2020
September	58%	57%	31%
September YTD	56%	55%	31%
Weekday	52%	52%	29%
Weekend	72%	71%	39%

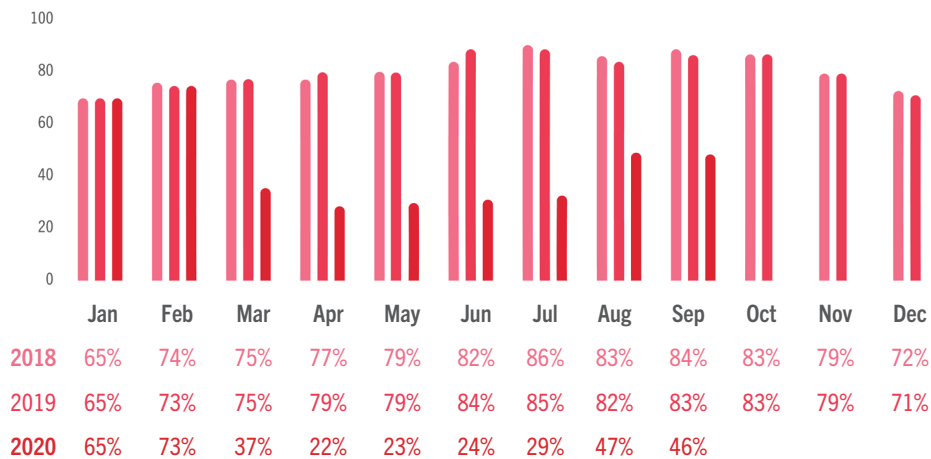
	2018	2019	2020
Room Supply	1.6%	2.2%	-5.1%
Room Demand	1.1%	1.6%	-48.0%

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

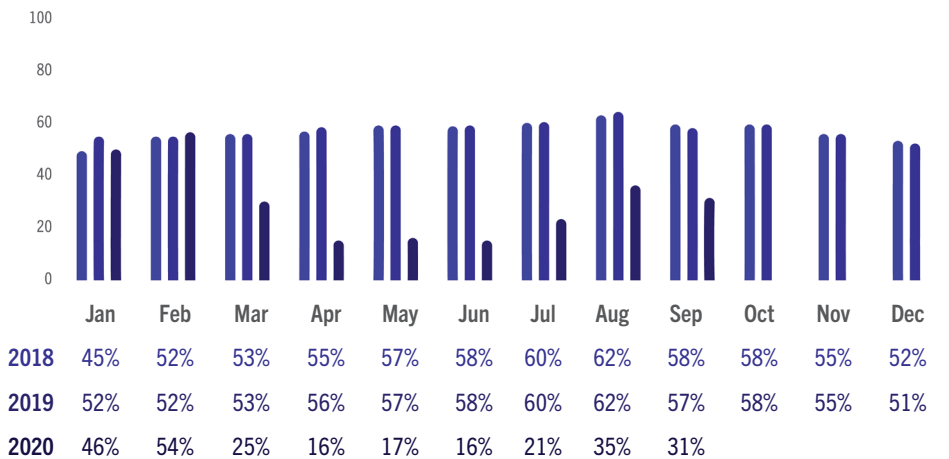


## England Room and Bedspace Occupancy

### Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month



## England ADR and RevPAR

At a glance - September 2020

● ADR ● RevPAR ⓘ % Change





## England ADR and RevPAR

### Data Tables

#### ADR

	2018	2019	2020
September	£101.39	£104.28	£69.57
Weekday	£102.37	£105.80	£66.60
Weekend	£99.21	£100.26	£76.39

#### RevPAR

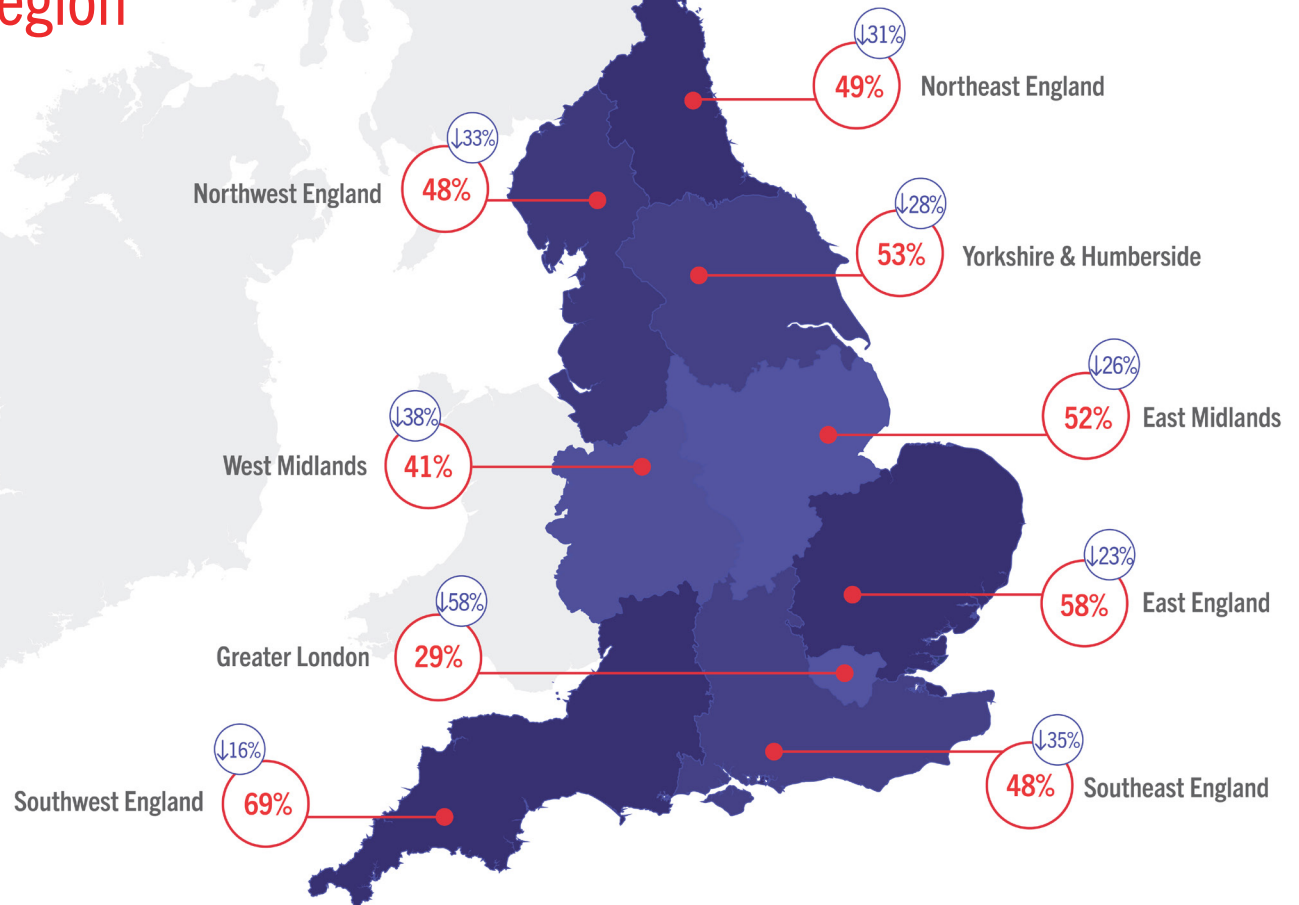
	2018	2019	2020
September	£84.74	£86.66	£31.66
Weekday	£84.38	£87.00	£28.80
Weekend	£85.60	£85.74	£39.55



## Room Occupancy By Region

At a glance - September 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	81%	81%	58%
East Midlands	81%	79%	52%
Greater London	87%	87%	29%
Northeast England	82%	80%	49%
Northwest England	82%	81%	48%
Southeast England	82%	83%	48%
Southwest England	85%	85%	69%
West Midlands	82%	79%	41%
Yorkshire & Humberside	80%	81%	53%

#### Bedspace Occupancy

	2018	2019	2020
East England	57%	56%	40%
East Midlands	56%	53%	35%
Greater London	61%	61%	21%
Northeast England	57%	55%	34%
Northwest England	57%	56%	33%
Southeast England	57%	56%	33%
Southwest England	59%	58%	47%
West Midlands	55%	52%	27%
Yorkshire & Humberside	57%	57%	37%

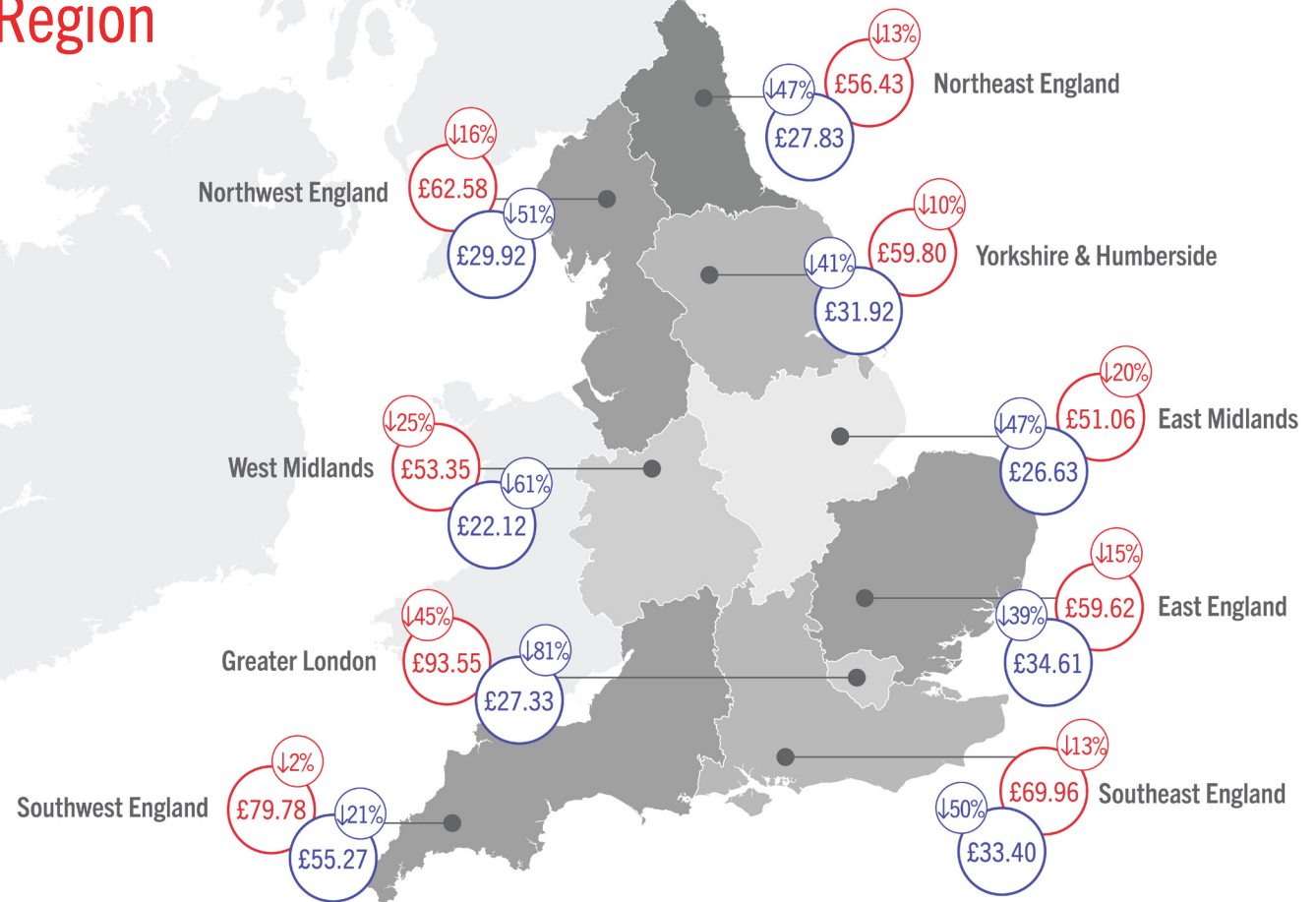


## ADR and RevPAR By Region

At a glance - September 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	£71.35	£69.82	£59.62
East Midlands	£64.70	£63.88	£51.06
Greater London	£157.38	£168.89	£93.55
Northeast England	£66.07	£65.12	£56.43
Northwest England	£75.28	£74.81	£62.58
Southeast England	£81.62	£80.59	£69.96
Southwest England	£82.97	£81.79	£79.78
West Midlands	£74.52	£71.22	£53.35
Yorkshire & Humberside	£66.45	£66.81	£59.80

#### RevPAR

	2018	2019	2020
East England	£58.06	£56.55	£34.61
East Midlands	£52.23	£50.20	£26.63
Greater London	£136.84	£146.68	£27.33
Northeast England	£53.98	£52.15	£27.83
Northwest England	£61.84	£60.60	£29.92
Southeast England	£67.32	£66.50	£33.40
Southwest England	£70.43	£69.68	£55.27
West Midlands	£60.82	£56.29	£22.12
Yorkshire & Humberside	£53.24	£54.28	£31.92



## Room Occupancy By Destination Type

At a glance - September 2020



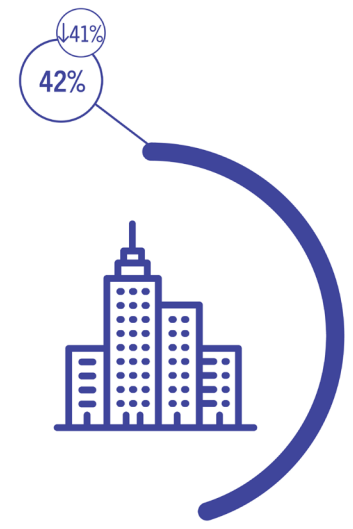
Countryside



Seaside



Small Town



City / Large Town

## Occupancy By Location Type

Data Tables

### Room Occupancy

	2018	2019	2020
City / Large Town	84%	83%	42%
Small Town	81%	81%	53%
Countryside	77%	79%	64%
Seaside	83%	84%	76%

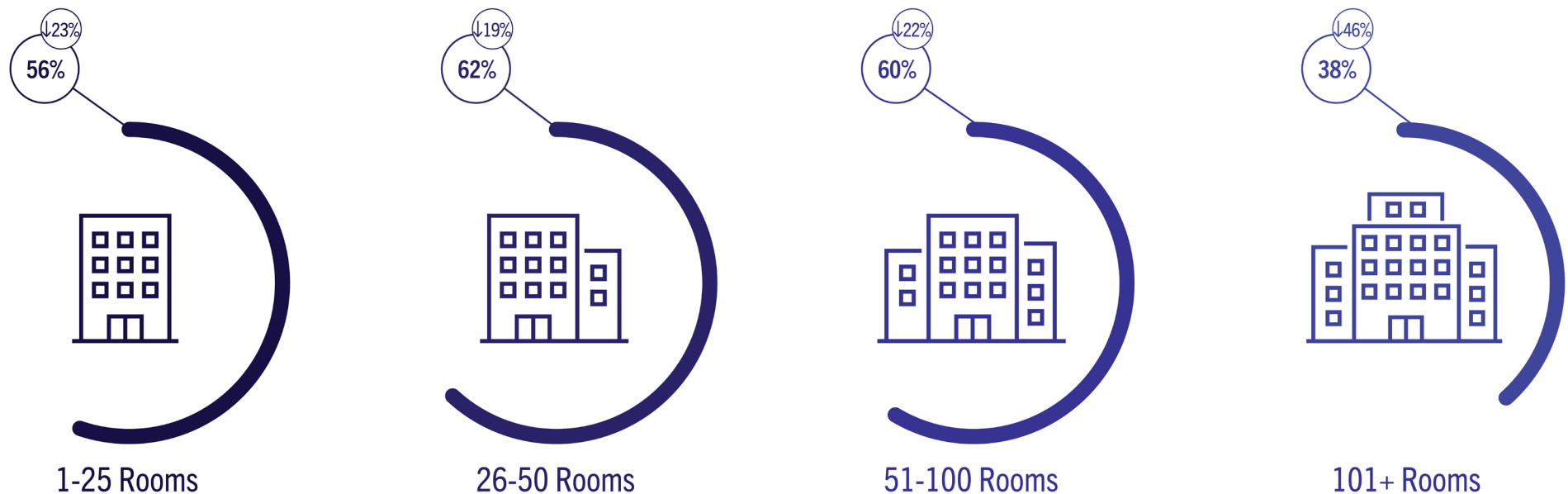
### Bedspace Occupancy

	2018	2019	2020
City / Large Town	58%	57%	29%
Small Town	58%	58%	38%
Countryside	52%	52%	43%
Seaside	60%	60%	55%



## Room Occupancy By Number of Rooms

At a glance - September 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	79%	79%	56%
26 to 50 Rooms	81%	81%	62%
51 to 100 Rooms	82%	82%	60%
101+ Rooms	84%	84%	38%

### Bedspace Occupancy

	2018	2019	2020
1 to 25 Rooms	56%	56%	40%
26 to 50 Rooms	57%	57%	44%
51 to 100 Rooms	60%	59%	43%
101+ Rooms	58%	57%	26%



## 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=3,216).





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:**

Website: [www.str.com](http://www.str.com)

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Email: [industrydata@str.com](mailto:industrydata@str.com)

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