

England Occupancy Survey

November 2020 Results



Summary of Results

Room occupancy in November 2020 decreased by 51% to 28% whilst bedspace occupancy in November 2020 decreased by 36% to 19% when compared to November 2019. In November 2020, room supply decreased by 16.3% when compared to November 2019. Meanwhile, room demand decreased by 70.6% 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 81% to £14.95 in November 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 53% to 27% followed by Small Town hotel occupancy which decreased by 43% to 30% and Seaside hotel occupancy which decreased by 41% to 29%. The smallest change from last year was recorded for Countryside hotels as occupancy decreased by 38% to 26%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased the most by 57% to 23% followed by hotels with 1 to 25 rooms and hotels with 26 to 50 rooms which both decreased occupancy by 41% to 29% and 34%, respectively. The smallest change from last year was recorded for hotels with 51 to 100 rooms as occupancy decreased by 36% to 41%.

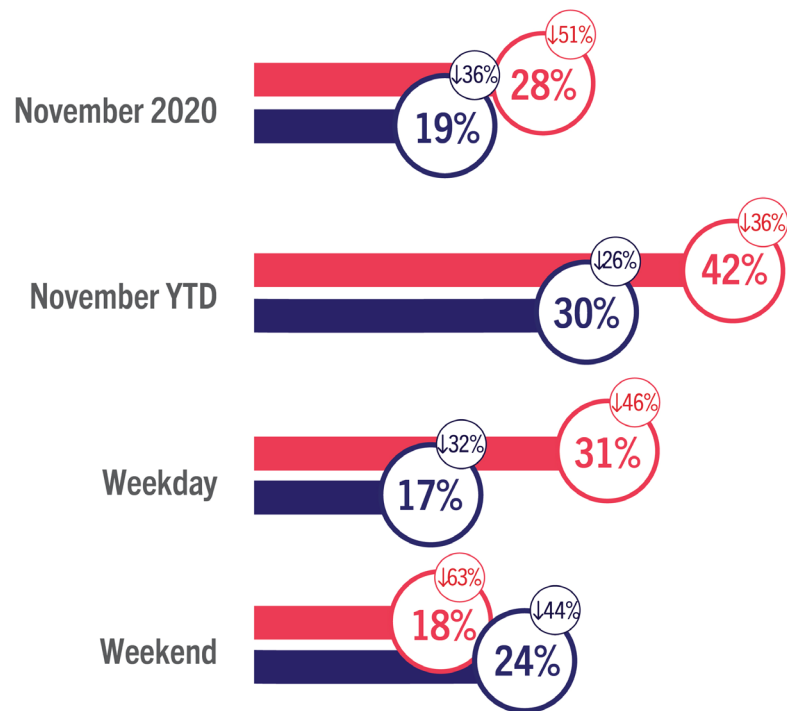
Evaluating trends across the **9 regions** of England, 0 regions achieved increased room occupancy whilst 9 regions achieved decreased room occupancy compared to the same month last year. The four regions that recorded the greatest change in room occupancy from last year were Greater London which decreased occupancy by 64% to 21%, Northwest England which decreased occupancy by 54% to 24%, Yorkshire & Humberside which decreased occupancy by 53% to 27% and West Midlands which decreased occupancy by 52% to 27%.

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

England Room and Bedspace Occupancy

At a glance - November 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
November	79%	79%	28%
November YTD	79%	78%	42%
Weekday	77%	77%	31%
Weekend	81%	81%	18%

Bedspace Occupancy

	2018	2019	2020
November	54%	55%	19%
November YTD	56%	56%	30%
Weekday	49%	49%	17%
Weekend	67%	67%	24%

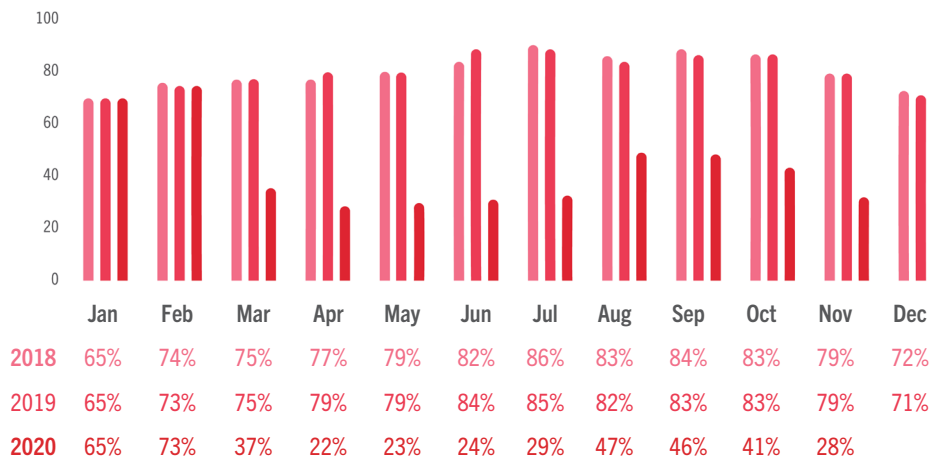
	2018	2019	2020
Room Supply	1.9%	1.8%	-16.3%
Room Demand	3.1%	2.0%	-70.6%

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

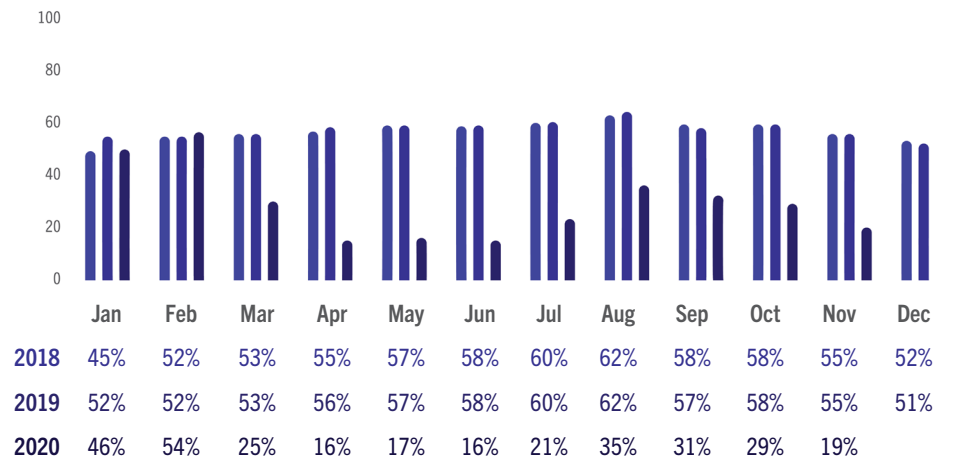


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



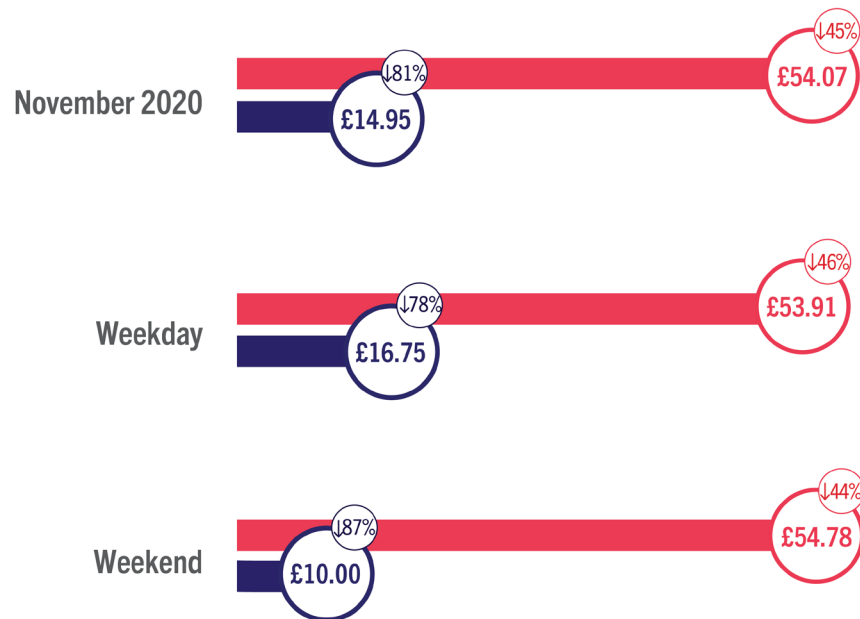
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - November 2020

● ADR ● RevPAR ⓘ % Change





England ADR and RevPAR

Data Tables

ADR

	2018	2019	2020
November	£98.22	£98.54	£54.07
Weekday	£99.39	£99.37	£53.91
Weekend	£95.63	£96.96	£54.78

RevPAR

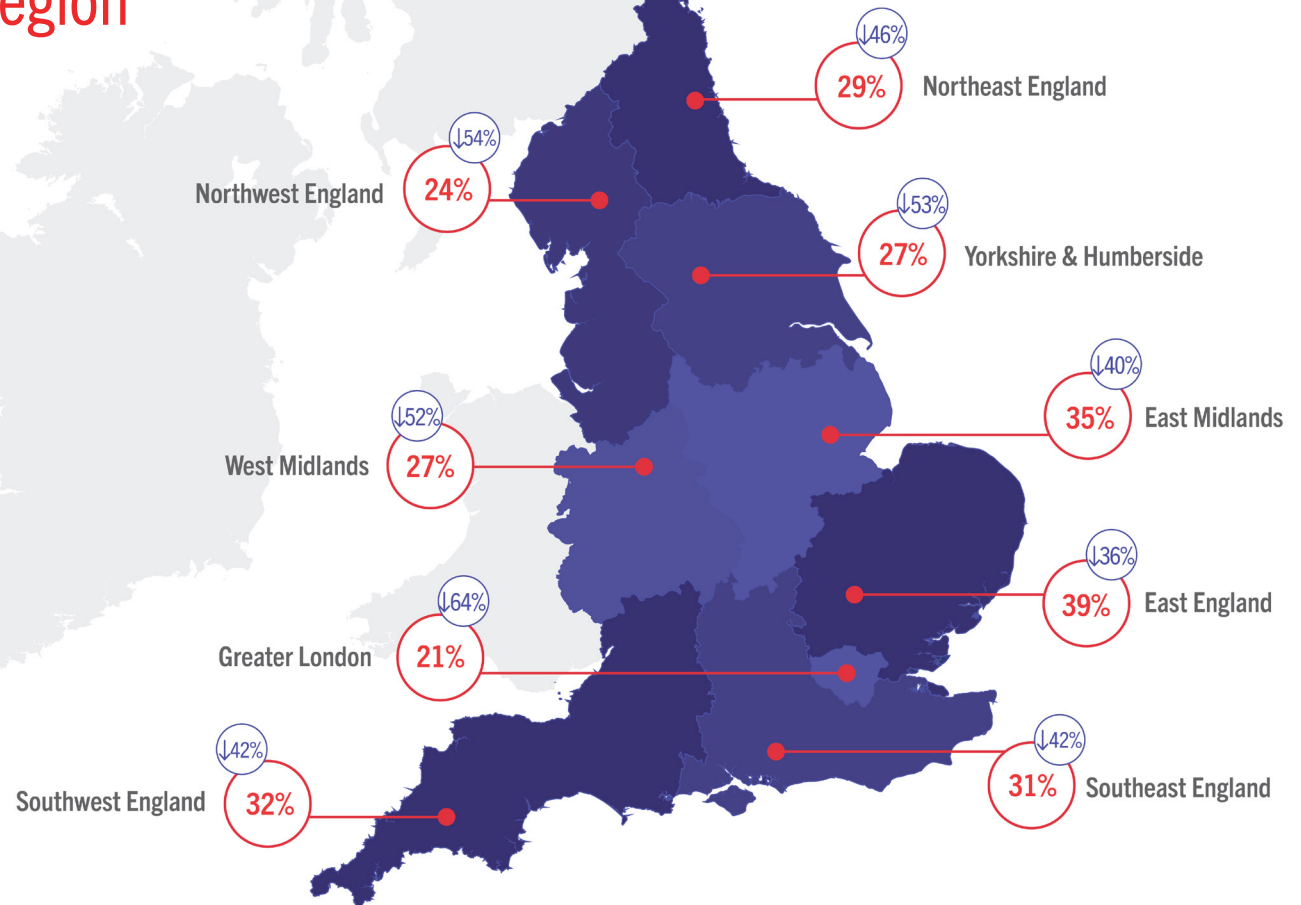
	2018	2019	2020
November	£77.15	£77.54	£14.95
Weekday	£76.87	£76.85	£16.75
Weekend	£77.82	£78.91	£10.00



Room Occupancy By Region

At a glance - November 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	75%	75%	39%
East Midlands	74%	75%	35%
Greater London	86%	86%	21%
Northeast England	73%	75%	29%
Northwest England	78%	78%	24%
Southeast England	74%	73%	31%
Southwest England	72%	73%	32%
West Midlands	78%	79%	27%
Yorkshire & Humberside	77%	80%	27%

Bedspace Occupancy

	2018	2019	2020
East England	52%	53%	27%
East Midlands	51%	52%	23%
Greater London	61%	61%	15%
Northeast England	51%	53%	20%
Northwest England	54%	55%	17%
Southeast England	51%	51%	21%
Southwest England	50%	51%	21%
West Midlands	52%	53%	18%
Yorkshire & Humberside	54%	57%	19%

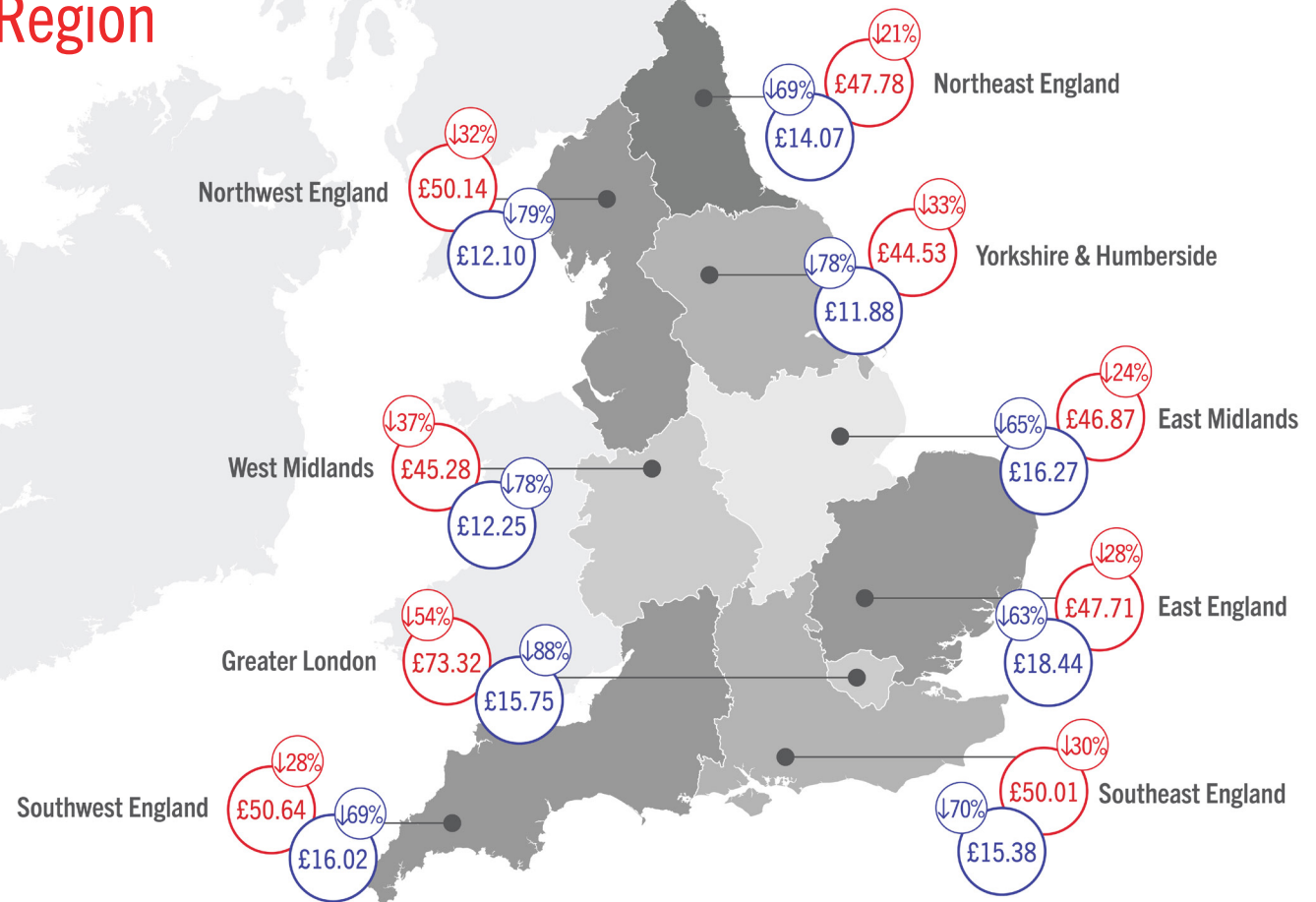


ADR and RevPAR By Region

At a glance - November 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

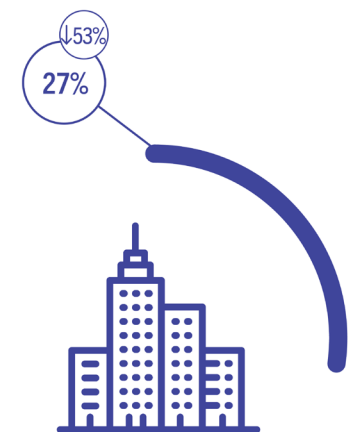
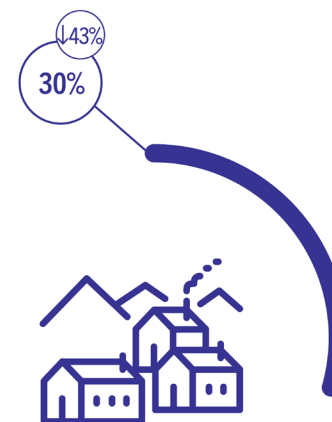
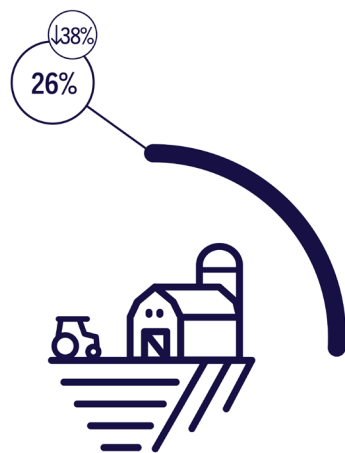
	2018	2019	2020
East England	£67.86	£65.95	£47.71
East Midlands	£61.85	£61.28	£46.87
Greater London	£155.45	£157.73	£73.32
Northeast England	£60.12	£60.64	£47.78
Northwest England	£72.70	£73.79	£50.14
Southeast England	£72.52	£71.14	£50.01
Southwest England	£71.03	£70.40	£50.64
West Midlands	£71.09	£71.46	£45.28
Yorkshire & Humberside	£65.25	£66.32	£44.53

RevPAR

	2018	2019	2020
East England	£50.66	£49.49	£18.44
East Midlands	£45.90	£45.86	£16.27
Greater London	£133.73	£135.04	£15.75
Northeast England	£44.09	£45.72	£14.07
Northwest England	£56.70	£57.55	£12.10
Southeast England	£53.61	£51.88	£15.38
Southwest England	£51.41	£51.62	£16.02
West Midlands	£55.57	£56.51	£12.25
Yorkshire & Humberside	£50.09	£52.83	£11.88

Room Occupancy By Destination Type

At a glance - November 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 Location Type

Data Tables

Room Occupancy

	2018	2019	2020
City / Large Town	80%	80%	27%
Small Town	72%	72%	30%
Countryside	63%	64%	26%
Seaside	71%	70%	29%

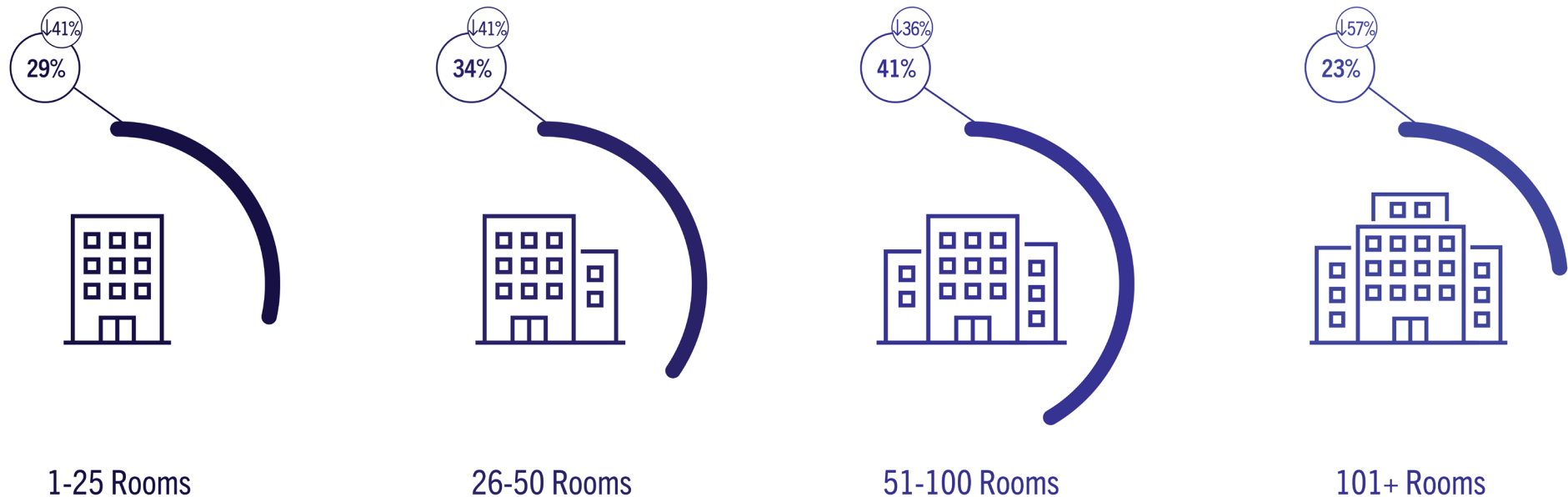
Bedspace Occupancy

	2018	2019	2020
City / Large Town	55%	56%	19%
Small Town	51%	52%	21%
Countryside	43%	44%	18%
Seaside	51%	51%	21%



Room Occupancy By Number of Rooms

At a glance - November 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	70%	70%	29%
26 to 50 Rooms	74%	75%	34%
51 to 100 Rooms	76%	77%	41%
101+ Rooms	80%	80%	23%

Bedspace Occupancy

	2018	2019	2020
1 to 25 Rooms	50%	51%	21%
26 to 50 Rooms	52%	53%	24%
51 to 100 Rooms	55%	56%	30%
101+ Rooms	55%	56%	16%



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. Please note that the room and bedspace occupancy figures in this report are rounded to the nearest whole number. As a result, occupancy absolute percentage change figures may have a discrepancy of $\pm 1\%$. 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=2,370).



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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