



England Occupancy Survey

June 2020 Results





Summary of Results

Room occupancy in June 2020 decreased by 60% to 24% whilst bedspace occupancy in June 2020 decreased by 42% to 16% when compared to June 2019. In June 2020, room supply decreased by 39.9% when compared to June 2019. Meanwhile, room demand decreased by 82.7% 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 85% to £13.88 in June 2020 when compared to the same month last year.

Looking at hotel performance across **destination types**, Small Town hotel room occupancy decreased the most by 66% to 16% followed by Countryside hotel occupancy which decreased by 60% to 18% and City / Large Town hotel occupancy which decreased by 59% to 25%. The smallest change from last year was recorded for Seaside hotels as occupancy decreased by 54% to 28%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms decreased room occupancy the most by 64% to 21% followed by hotels with 26 to 50 rooms which decreased occupancy by 52% to 28% and hotels with 51 to 100 rooms which decreased occupancy by 48% to 33%. The smallest change from last year was recorded for hotels with 1 to 25 rooms as occupancy decreased by 40% to 42%.

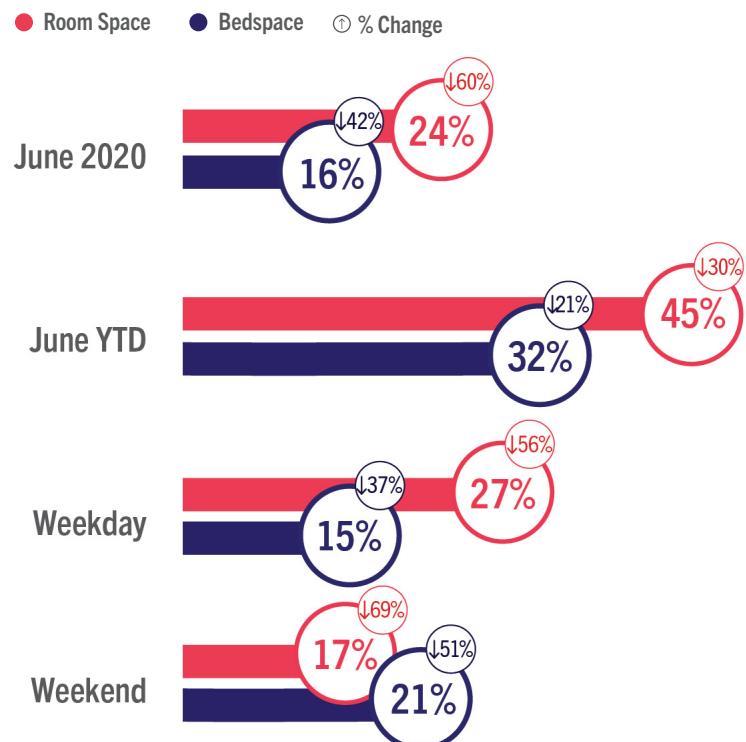
Evaluating trends across the **9 regions** of England, 0 regions achieved increased room occupancy whilst 9 regions achieved decreased room occupancy compared to the same month last year. The three regions that recorded the greatest change in room occupancy from last year were Greater London which decreased occupancy by 66% to 23%, Northwest England which decreased occupancy by 60% to 20% and Southwest England which decreased occupancy by 60% to 24%.

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



England Room and Bedspace Occupancy

At a glance - June 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
June	82%	84%	24%
June YTD	75%	75%	45%
Weekday	82%	83%	27%
Weekend	83%	86%	17%

Bedspace Occupancy	2018	2019	2020
June	58%	58%	16%
June YTD	53%	53%	32%
Weekday	51%	52%	15%
Weekend	71%	72%	21%

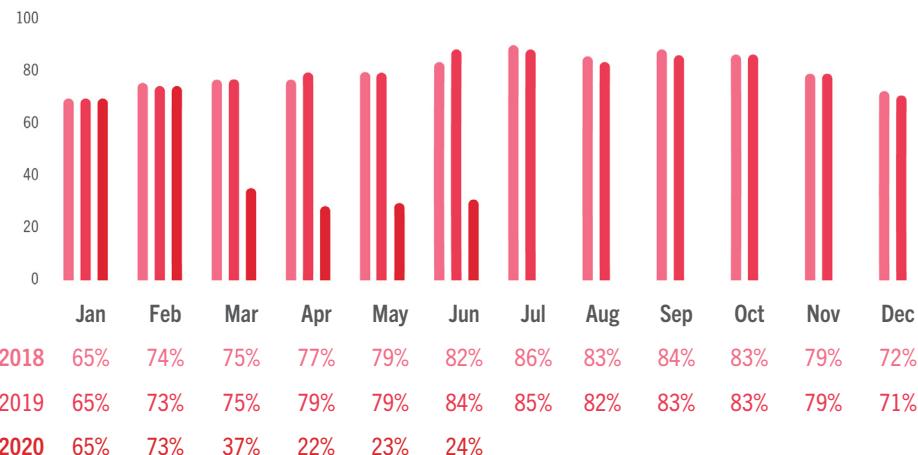
	2018	2019	2020
Room Supply	1.4%	2.3%	-39.9%
Room Demand	3.5%	3.7%	-82.7%

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

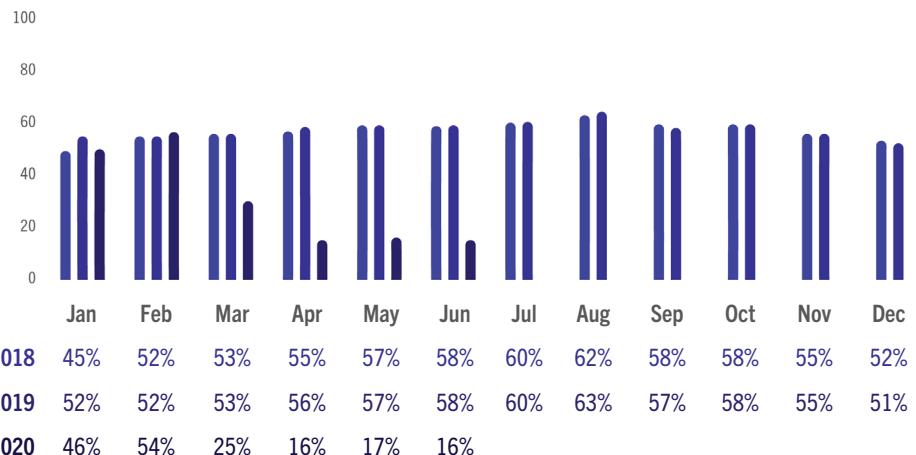


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



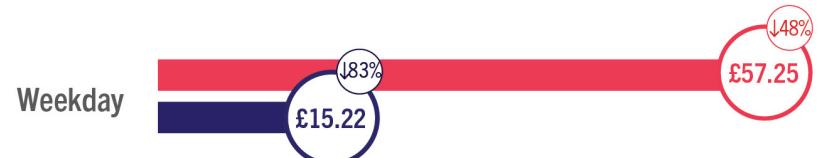
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - June 2020

● ADR ● RevPAR ① % Change





England ADR and RevPAR

Data Tables

ADR	2018	2019	2020
June	£102.22	£108.64	£57.89
Weekday	£104.17	£109.58	£57.25
Weekend	£98.37	£106.53	£60.69

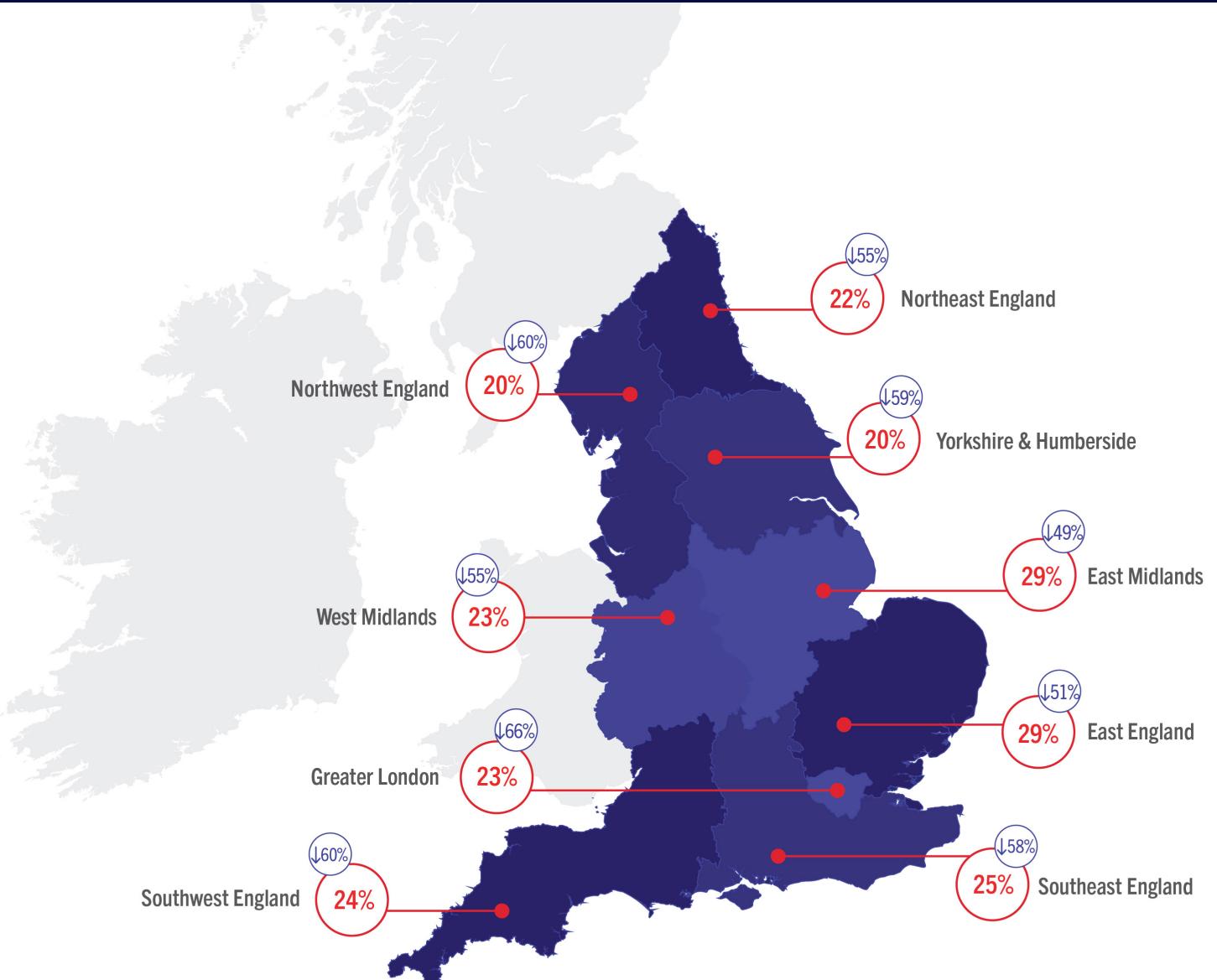
RevPAR	2018	2019	2020
June	£84.18	£90.73	£13.88
Weekday	£85.26	£90.44	£15.22
Weekend	£82.02	£91.40	£10.21



Room Occupancy By Region

At a glance - June 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	80%	80%	29%
East Midlands	77%	78%	29%
Greater London	86%	90%	23%
Northeast England	78%	77%	22%
Northwest England	81%	81%	20%
Southeast England	84%	84%	25%
Southwest England	83%	83%	24%
West Midlands	77%	78%	23%
Yorkshire & Humberside	78%	79%	20%

Bedspace Occupancy

	2018	2019	2020
East England	57%	56%	20%
East Midlands	54%	54%	19%
Greater London	62%	63%	16%
Northeast England	55%	53%	15%
Northwest England	57%	56%	14%
Southeast England	59%	58%	17%
Southwest England	58%	58%	16%
West Midlands	52%	52%	15%
Yorkshire & Humberside	56%	56%	14%

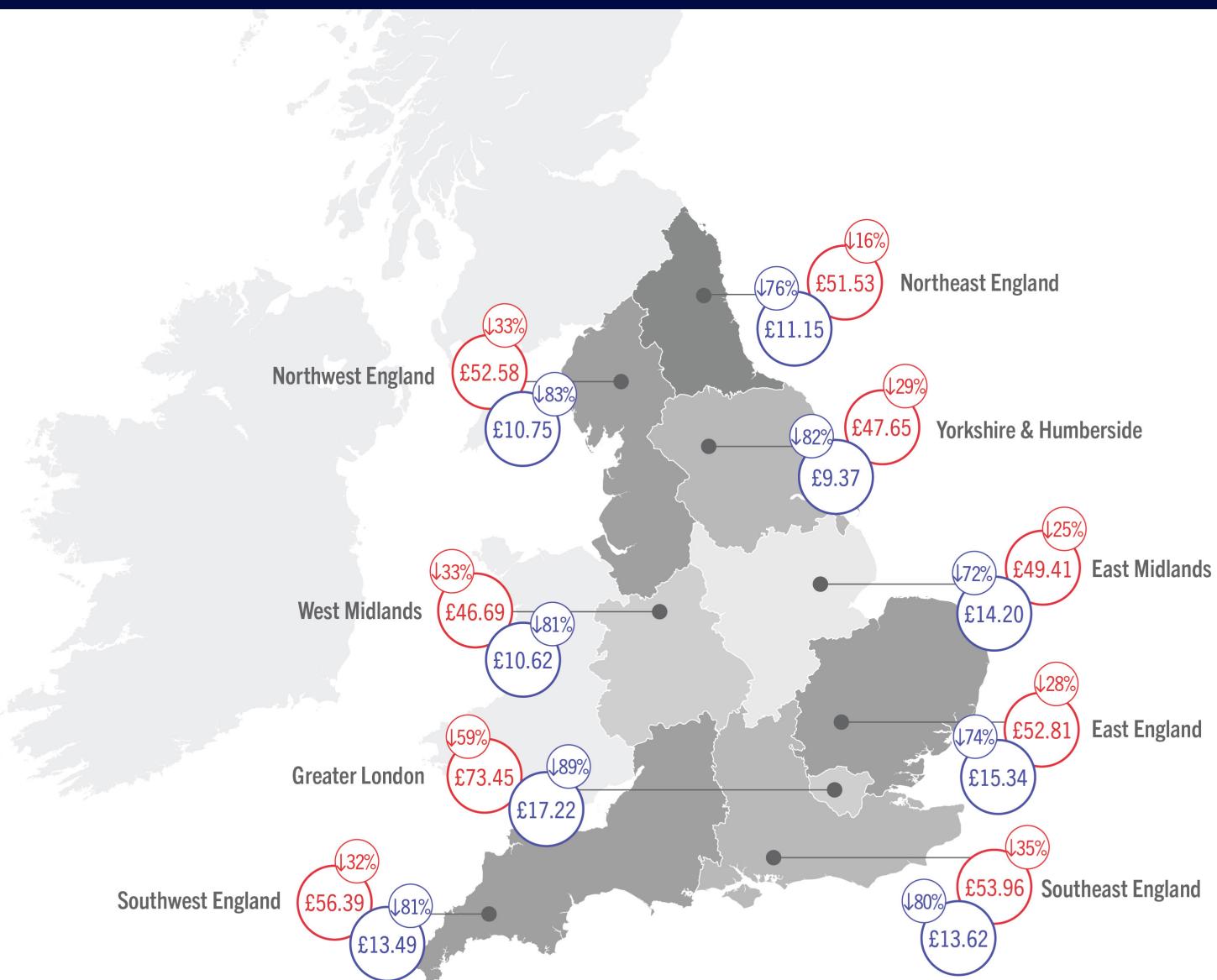


ADR and RevPAR By Region

At a glance - June 2020

*The figures in the graphic show the latest month revenue figures and year-on-year percentage changes (in relative terms).

● ADR ● RevPAR ① % Change





ADR and RevPAR By Region

Data Tables

ADR	2018	2019	2020
East England	£73.67	£73.01	£52.81
East Midlands	£64.20	£65.80	£49.41
Greater London	£159.10	£177.04	£73.45
Northeast England	£67.39	£61.54	£51.53
Northwest England	£75.47	£78.21	£52.58
Southeast England	£83.77	£83.32	£53.96
Southwest England	£83.51	£82.96	£56.39
West Midlands	£68.02	£70.04	£46.69
Yorkshire & Humberside	£65.99	£66.71	£47.65

RevPAR	2018	2019	2020
East England	£59.03	£58.61	£15.34
East Midlands	£49.55	£51.42	£14.20
Greater London	£137.21	£158.72	£17.22
Northeast England	£52.68	£47.12	£11.15
Northwest England	£61.00	£63.29	£10.75
Southeast England	£70.12	£69.59	£13.62
Southwest England	£69.43	£69.22	£13.49
West Midlands	£52.41	£54.53	£10.62
Yorkshire & Humberside	£51.31	£52.48	£9.37



Room Occupancy By Destination Type

At a glance - June 2020



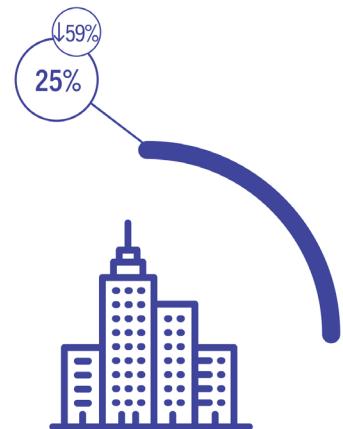
Countryside



Seaside



Small Town



City / Large Town



Occupancy By Location Type

Data Tables

Room Occupancy

	2018	2019	2020
City / Large Town	83%	84%	25%
Small Town	81%	82%	16%
Countryside	75%	77%	18%
Seaside	82%	82%	28%

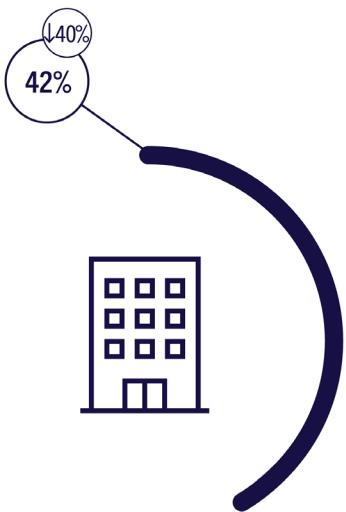
Bedspace Occupancy

	2018	2019	2020
City / Large Town	58%	58%	17%
Small Town	59%	58%	11%
Countryside	52%	52%	12%
Seaside	61%	59%	20%

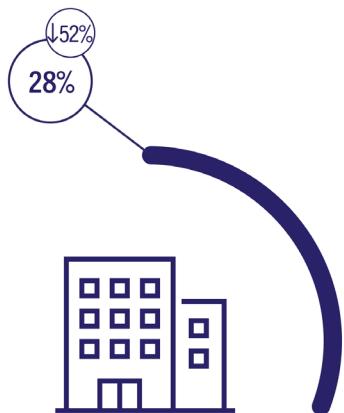


Room Occupancy By Number of Rooms

At a glance - June 2020



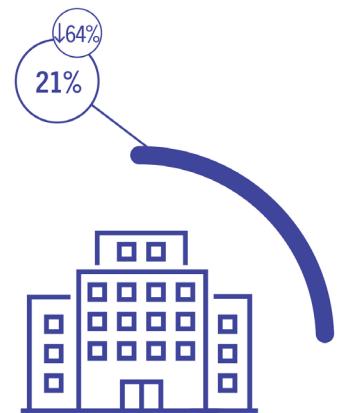
1-25 Rooms



26-50 Rooms



51-100 Rooms



101+ Rooms



Occupancy By Number of Rooms

Data Tables

Room Occupancy	2018	2019	2020
1 to 25 Rooms	79%	81%	42%
26 to 50 Rooms	80%	81%	28%
51 to 100 Rooms	80%	81%	33%
101+ Rooms	84%	85%	21%

Bedspace Occupancy	2018	2019	2020
1 to 25 Rooms	57%	58%	30%
26 to 50 Rooms	57%	57%	20%
51 to 100 Rooms	59%	59%	24%
101+ Rooms	58%	58%	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=879).



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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