

# England Occupancy Survey

August 2023 Results

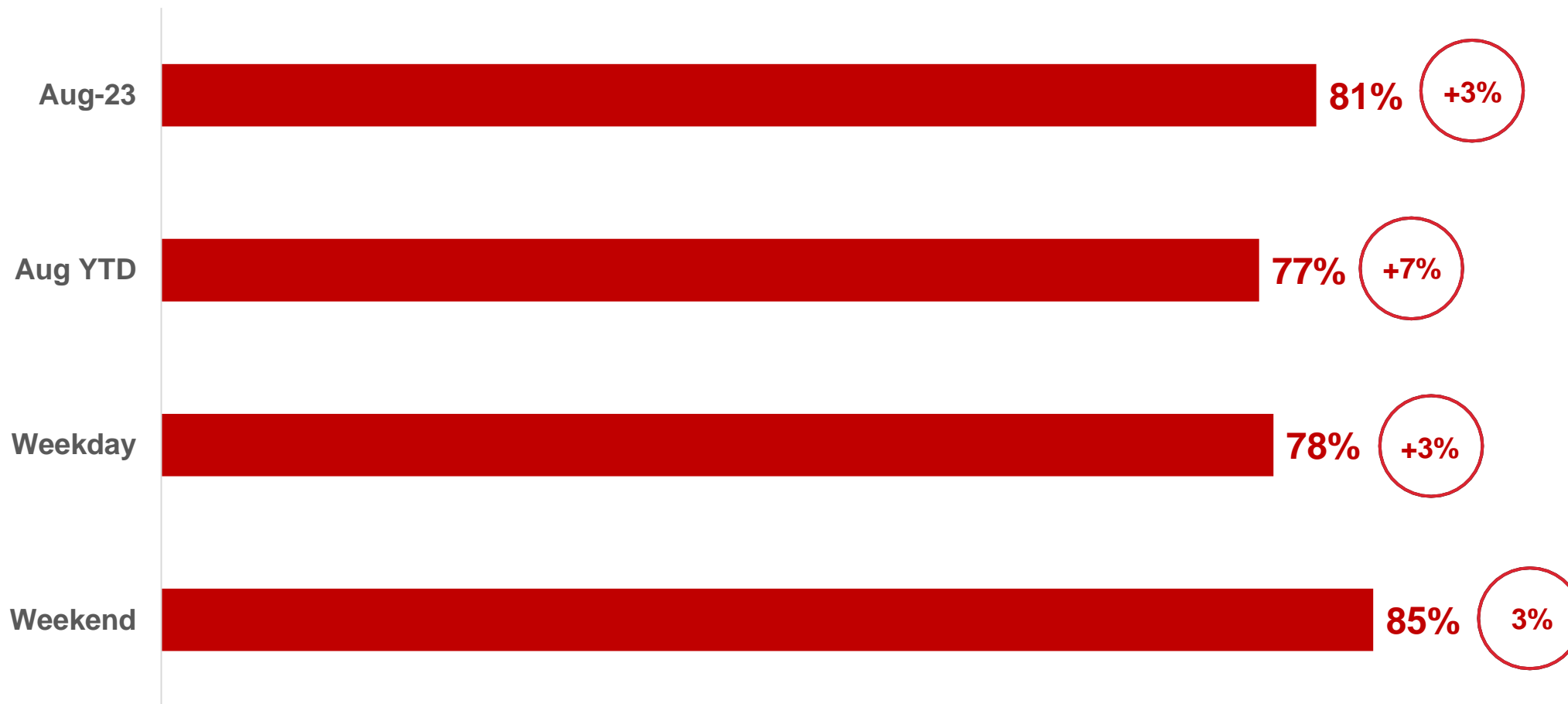
VisitEngland Research

# Summary of Results

- When comparing August 2023 results with August 2022, room occupancy increased from 78% to 80%, however remains just below the August 2019 pre-pandemic occupancy level of 82%
- **Room supply** saw no change whilst room demand increased 2.8% compared to August 2022.
- **RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 8% to £95.96 in August 2023, when compared to the same month in 2022.
- Looking at hotel performance across **destination types**, occupancy in small towns increased by 3%, on par with the increase in city/large towns (3%), followed by countryside hotels (+2%). Seaside hotels saw occupancy decline slightly but still had the highest occupancy (84%) of all destination types.
- Assessing room occupancy by establishment size, the largest hotels (100+ rooms) increased their occupancy the most, up 4% to 80% in August 2023. Hotels with 51-100 rooms had the highest occupancy overall (82%), despite a 1% decline.
- The regions which recorded growth compared to August 2022; London (+6%) and South East England (5%). The region with the highest overall occupancy in August 2023 was the South West as 84%.

# England Room Occupancy

At a glance – August 2023



# England Room Occupancy

## Data Tables - August

Room Occupancy	2019	2021	2022	2023
August	82%	71%	78%	80%
August YTD	77%	46%	72%	77%
Weekday	80%	68%	76%	78%
Weekend	86%	78%	83%	85%

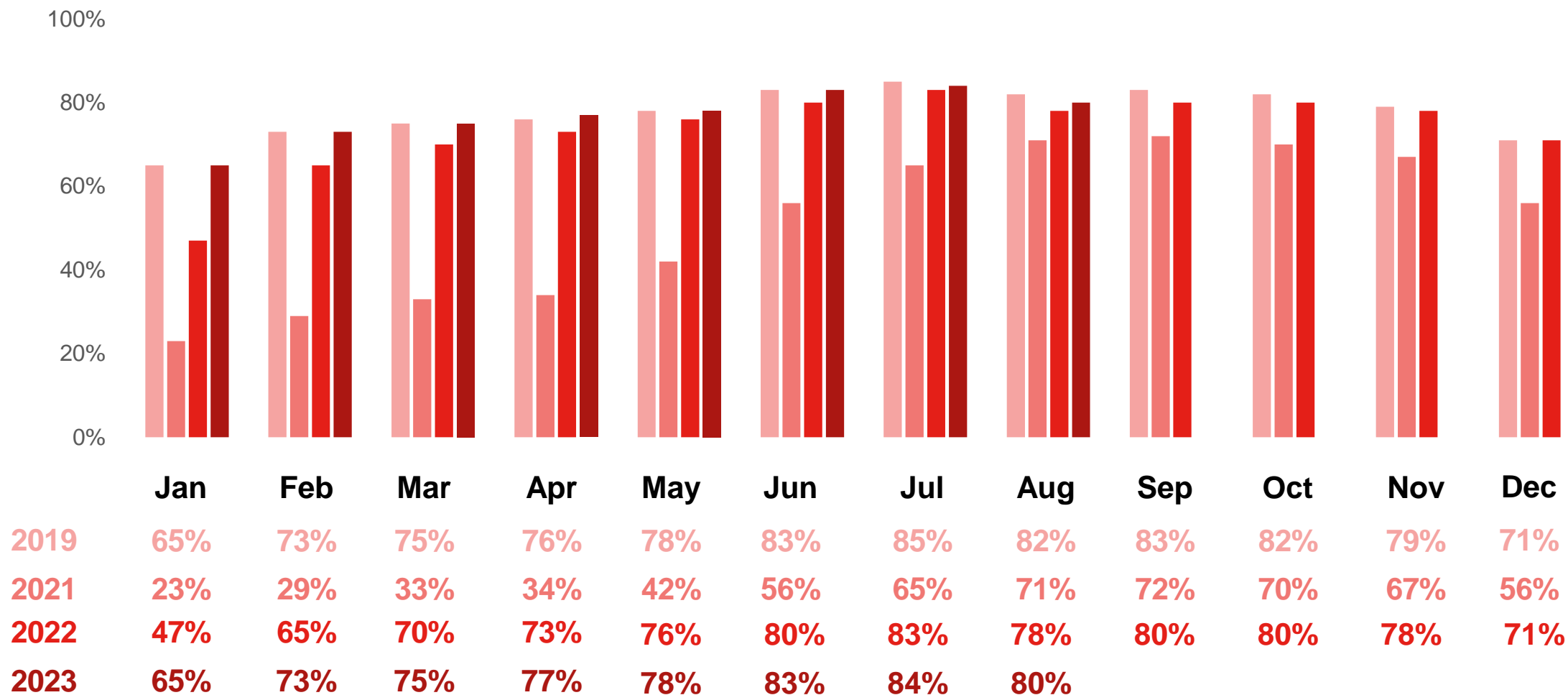
Room Supply and Room Demand <i>Year-on-year relative % change</i>	2019	2021	2022	2023
Room Supply	2.3%	9.3%	2.5%	0%
Room Demand	1.7%	65.8%	12.9%	2.8%

Note: Historical figures subject to change as new hotels submit data to STR



# England Room Occupancy

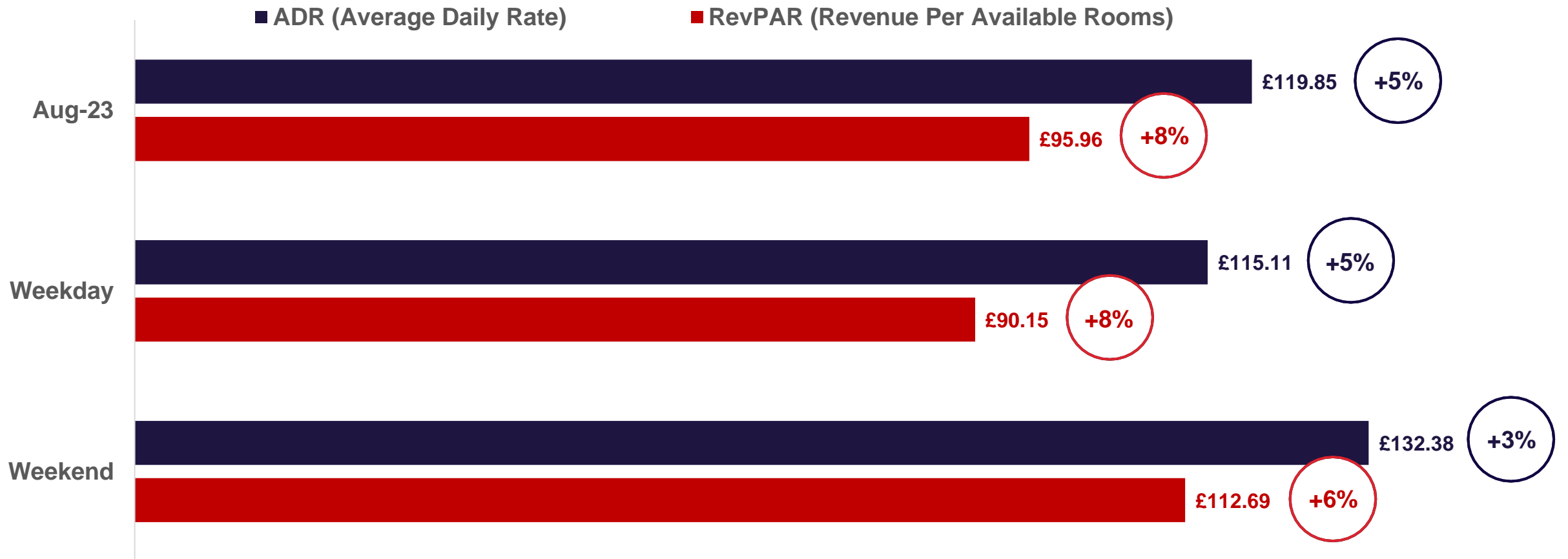
## England Room Occupancy by Month



Note: Historical figures subject to change as new hotels submit data to STR



# England ADR and RevPAR



# England ADR and RevPAR

Data Tables - August

<b>ADR</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>August</b>	£96.59	£94.69	£114.44	£119.85
<b>Weekday</b>	£94.82	£89.03	£109.08	£115.11
<b>Weekend</b>	£100.05	£108.85	£127.74	£132.38

<b>RevPAR</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>August</b>	£79.16	£67.10	£89.13	£95.96
<b>Weekday</b>	£75.99	£60.72	£83.30	£90.15
<b>Weekend</b>	£85.84	£85.44	£105.96	£112.69

ADR = Average Daily Rate, RevPAR = Revenue Per Available Rooms

Note: Historical figures subject to change as new hotels submit data to STR

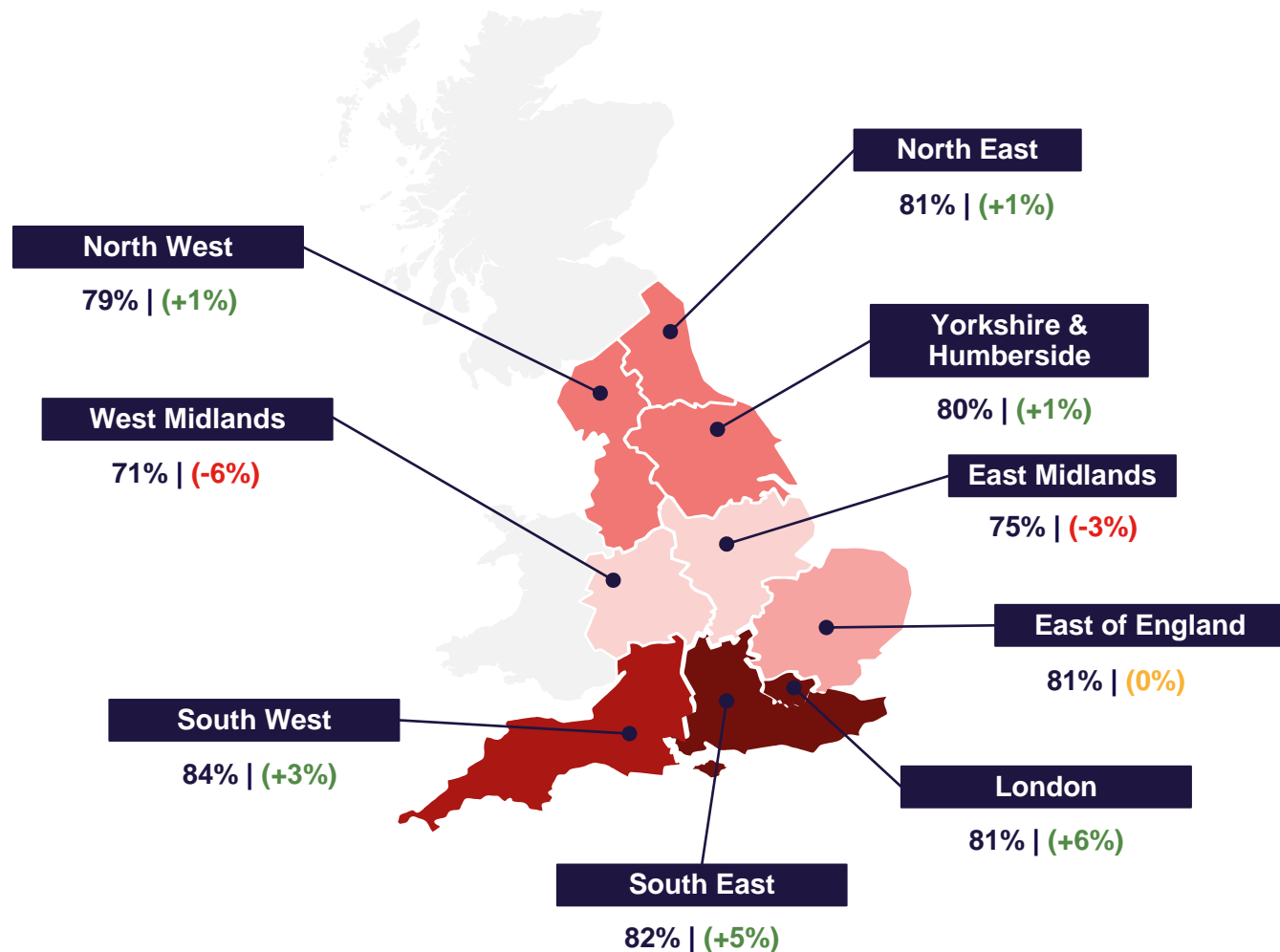


# Room Occupancy by Region

## At a glance – August 2023

The figures in the graphic show the latest month occupancy figures and year-on-year percent changes (in absolute terms).

Room Occupancy | (year-on-year % change)



Colour grading of map based on year-on-year % change, relative to the other regions



# Occupancy by Region

## Data Tables - August

<b>Room Occupancy</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>East England</b>	79%	78%	80%	81%
<b>East Midlands</b>	74%	77%	77%	75%
<b>Greater London</b>	86%	56%	77%	81%
<b>Northeast England</b>	78%	82%	80%	81%
<b>Northwest England</b>	80%	76%	78%	79%
<b>Southeast England</b>	82%	73%	78%	82%
<b>Southwest England</b>	87%	85%	82%	84%
<b>West Midlands</b>	76%	73%	76%	71%
<b>Yorkshire &amp; Humberside</b>	80%	80%	79%	80%

Note: Historical figures subject to change as new hotels submit data to STR

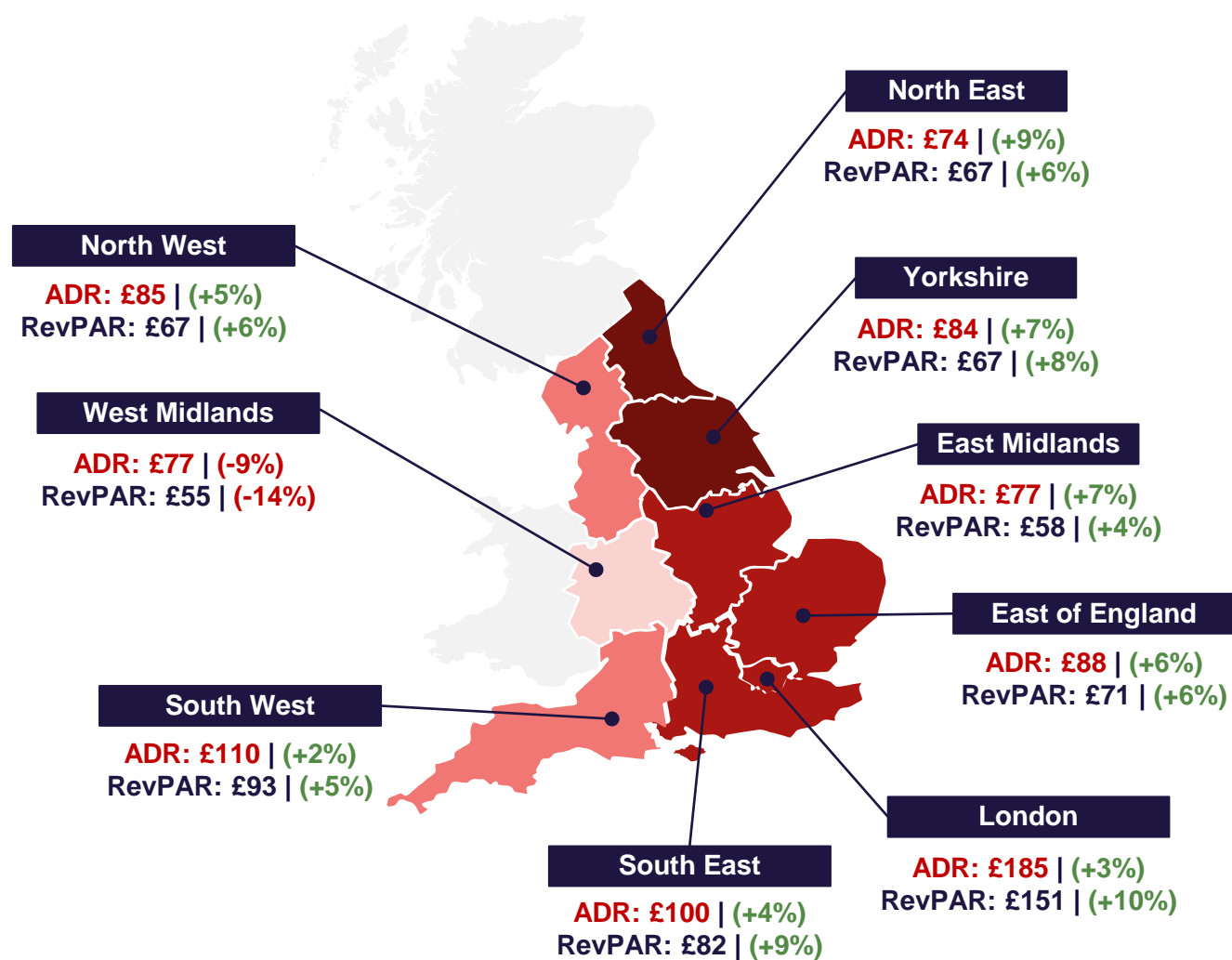


# ADR and RevPAR by Region

## At a glance – August 2023

The figures in the graphic show ADR (Average Daily Rate) and RevPAR (Revenue Per Available Room) and the year-on-year percentage change

ADR | (year-on-year % change)  
RevPAR | (year-on-year % change)



Colour grading of map based on year-on-year % change, relative to the other regions

# ADR and RevPAR by Region

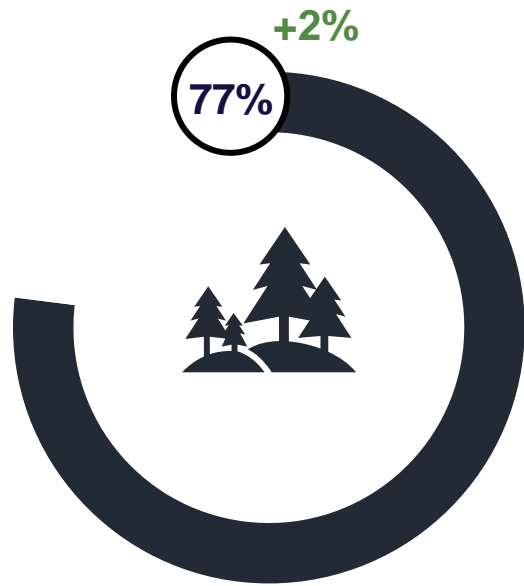
## Data Tables - August

<b>ADR</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>RevPAR</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>East England</b>	£67.94	£82.07	£82.96	£87.91	<b>East England</b>	£53.86	£63.61	£66.72	£70.83
<b>East Midlands</b>	£60.13	£69.44	£71.91	£77.08	<b>East Midlands</b>	£44.28	£53.67	£55.67	£57.66
<b>Greater London</b>	£150.37	£112.99	£178.77	£184.82	<b>Greater London</b>	£129.48	£63.75	£136.77	£150.54
<b>Northeast England</b>	£58.44	£72.67	£68.03	£74.32	<b>Northeast England</b>	£45.40	£59.51	£54.65	£60.32
<b>Northwest England</b>	£70.40	£84.96	£80.53	£84.53	<b>Northwest England</b>	£56.51	£64.71	£63.01	£66.82
<b>Southeast England</b>	£76.21	£94.44	£96.28	£99.97	<b>Southeast England</b>	£62.65	£69.34	£75.36	£82.26
<b>Southwest England</b>	£88.17	£122.30	£107.84	£110.10	<b>Southwest England</b>	£76.72	£104.14	£88.00	£92.63
<b>West Midlands</b>	£61.65	£72.69	£85.13	£77.47	<b>West Midlands</b>	£46.58	£52.80	£64.48	£55.24
<b>Yorkshire &amp; Humberside</b>	£66.87	£85.56	£78.19	£83.79	<b>Yorkshire &amp; Humberside</b>	£53.75	£68.50	£62.06	£66.96

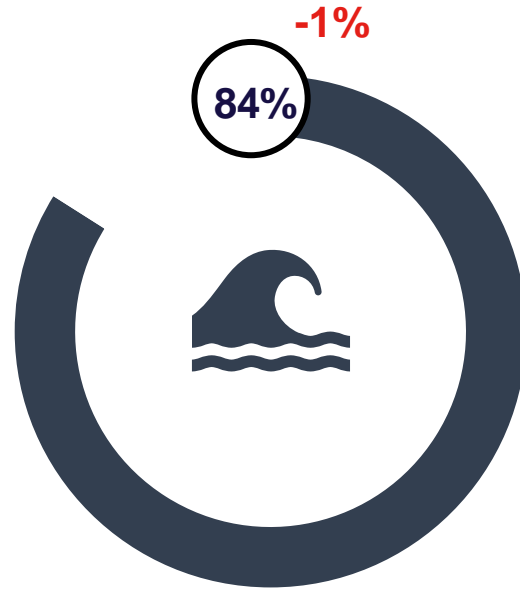
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# Room Occupancy by Destination Type

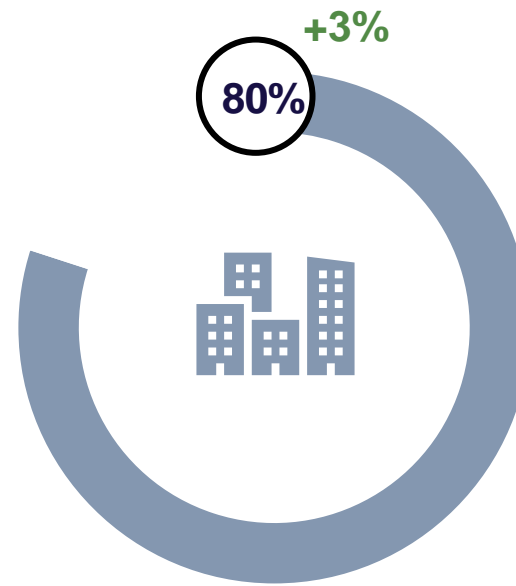
At a glance – August 2023



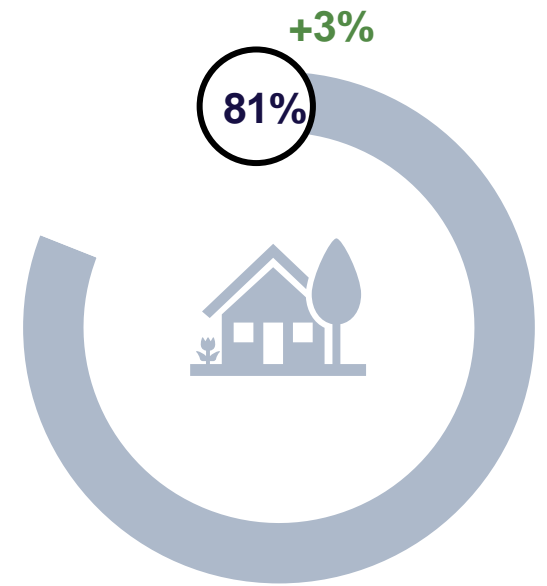
Countryside



Seaside



City / Large Town



Small Town

# Room Occupancy by Destination Type

## Data Tables - August

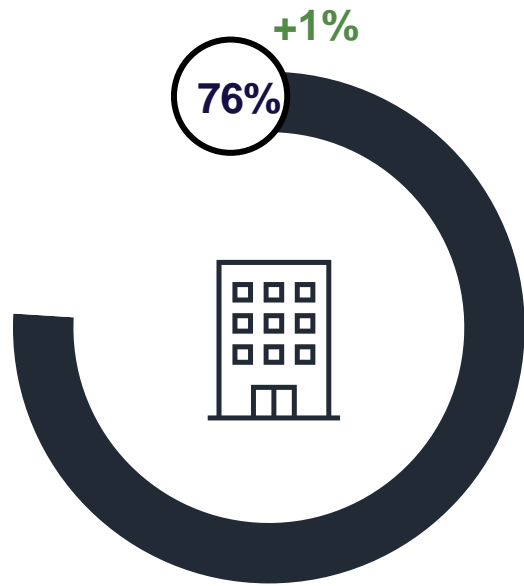
<b>Room Occupancy</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>City / Large Town</b>	82%	69%	78%	80%
<b>Small Town</b>	81%	76%	78%	81%
<b>Countryside</b>	84%	83%	76%	77%
<b>Seaside</b>	89%	87%	85%	84%

Note: Historical figures subject to change as new hotels submit data to STR



# Room Occupancy by Number of Rooms

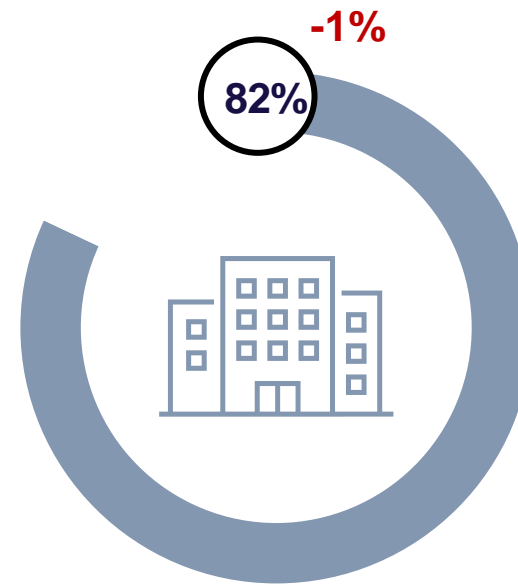
At a glance – August 2023



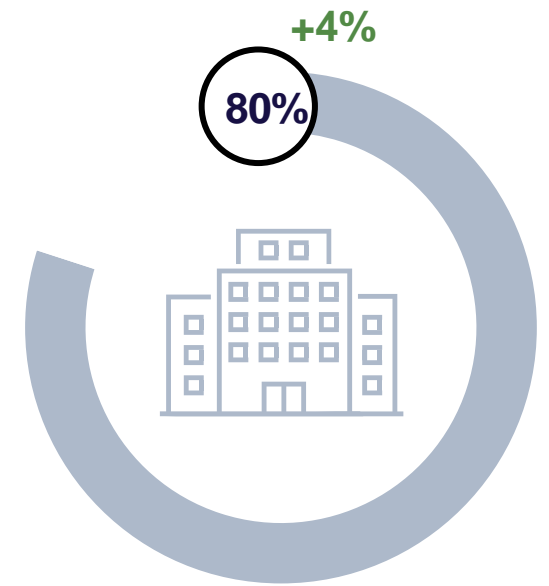
1-25 Rooms



26-50 Rooms



51-100 Rooms



100+ Rooms

# Room Occupancy by Number of Rooms

## Data Tables - July

Room Occupancy	2019	2021	2022	2023
1 to 25 Rooms	79%	78%	75%	76%
26 to 50 Rooms	81%	81%	79%	79%
51 to 100 Rooms	82%	81%	82%	82%
101+ Rooms	82%	66%	80%	80%

Note: Historical figures subject to change as new hotels submit data to STR



# 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 rooms 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 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 based on those hotels that were open and reported data to STR (N=3,535)