

England Occupancy Survey

September 2023 Results

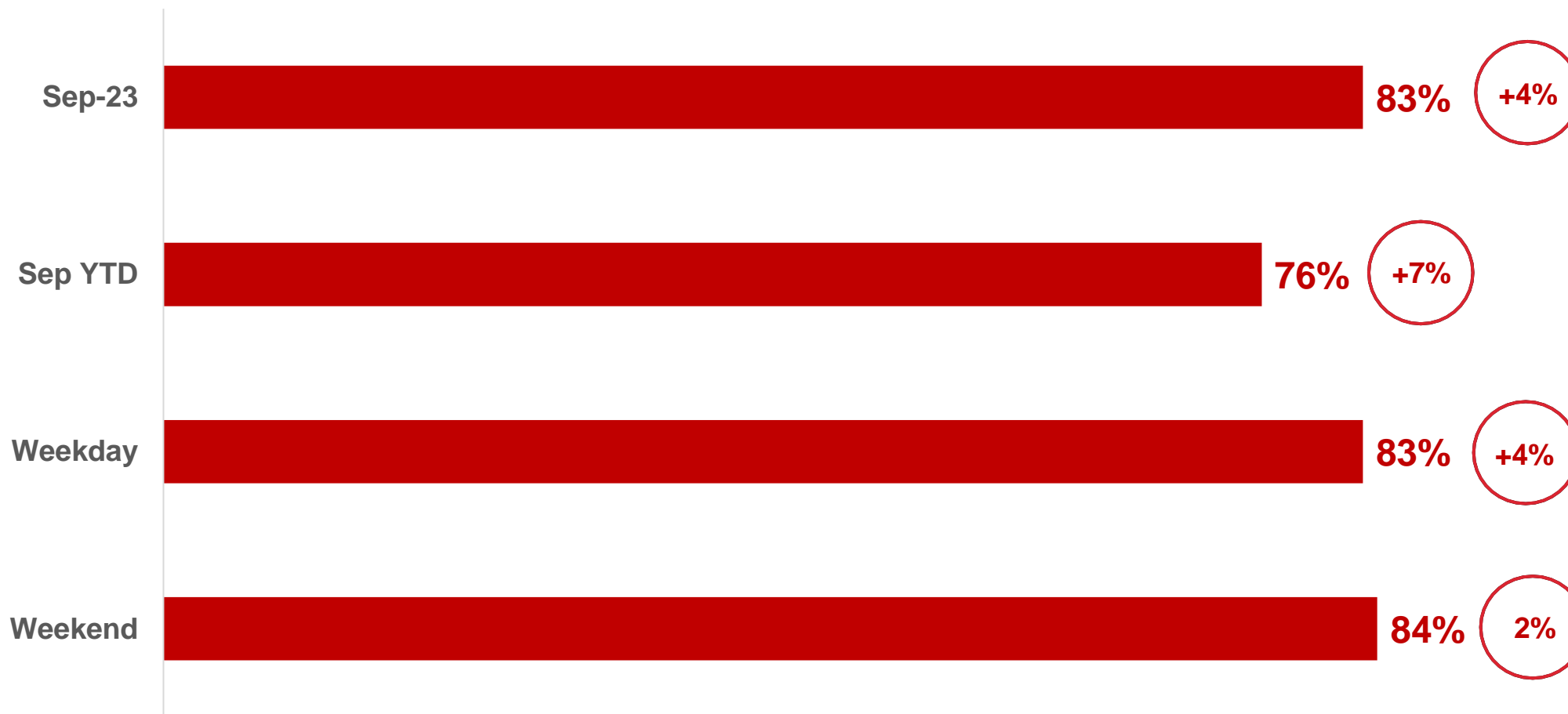
VisitEngland Research

Summary of Results

- When comparing September 2023 results with September 2022, **room occupancy** increased from 80% to 83%, on par with 2019 occupancy levels.
- **Room supply** saw a small change (+0.3%) whilst **room demand** increased 7.1% compared to September 2022.
- **RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 9% to £108.96 in September 2023, when compared to the same month in 2022.
- Hotel performance increased year on year across all **destination types**, with seaside destinations reporting an 8% increase on 2022, followed by countryside destinations with an increase of 6%. Although these two destination types are still sitting just below 2019 levels.
- Assessing room occupancy by **establishment size**, the biggest categories increased their room occupancy; 51-100 room hotels (+1%) and 100+ room hotels (+5%) whilst those with 50 rooms or less saw a decrease year on year with occupancy rates sitting below 2019 levels.
- All **regions in England** recorded growth in room occupancy compared to September 2022; South East England (+5%), Yorkshire & Humberside (+4%) and the North East England (+4%) recorded the highest growth. All regions except London were above 2019 rates for room occupancy in September 2023.

England Room Occupancy

At a glance – September 2023



x% % change from same period in previous year

England Room Occupancy

Data Tables - September

Room Occupancy	2019	2021	2022	2023
September	83%	72%	80%	83%
September YTD	78%	49%	73%	78%
Weekday	82%	69%	80%	83%
Weekend	85%	80%	82%	84%

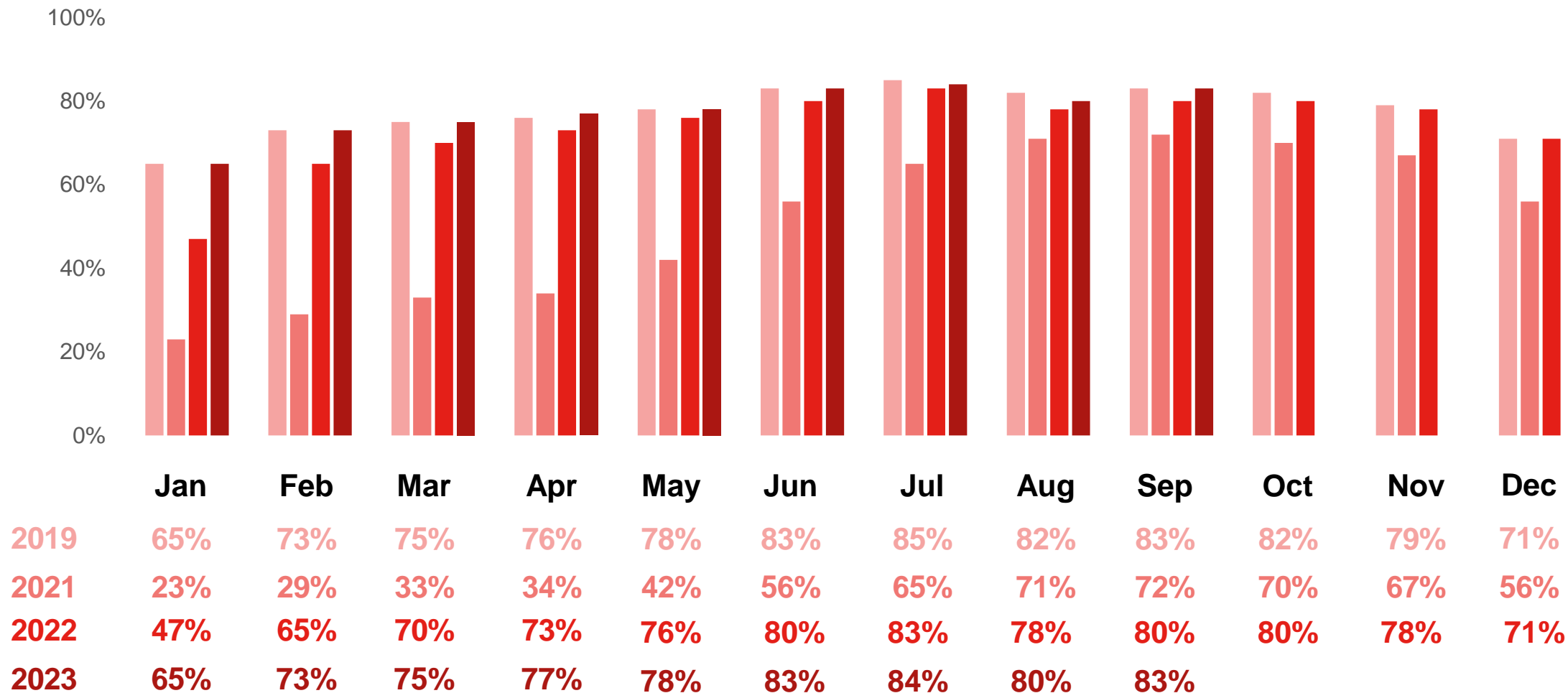
Room Supply and Room Demand <i>Year-on-year relative % change</i>	2019	2021	2022	2023
Room Supply	2.2%	6.4%	1.7%	0.3%
Room Demand	1.5%	69.0%	13.3%	7.1%

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



England Room Occupancy

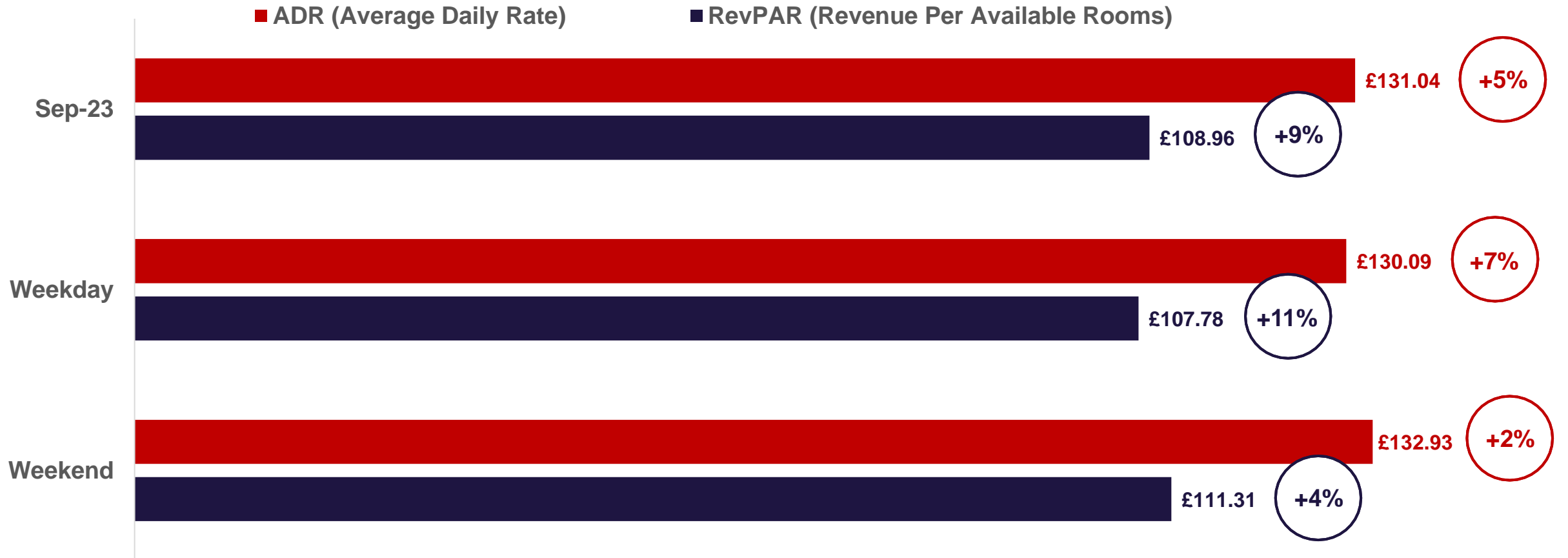
England Room Occupancy by Month



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



England ADR and RevPAR



England ADR and RevPAR

Data Tables - September

ADR	2019	2021	2022	2023
September	£105.08	£102.87	£124.62	£131.04
Weekday	£106.66	£97.43	£121.99	£130.09
Weekend	£100.92	£115.84	£130.17	£132.93

RevPAR	2019	2021	2022	2023
September	£87.31	£74.24	£100.11	£108.96
Weekday	£87.70	£67.57	£97.02	£107.78
Weekend	£86.25	£92.60	£107.38	£111.31

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

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

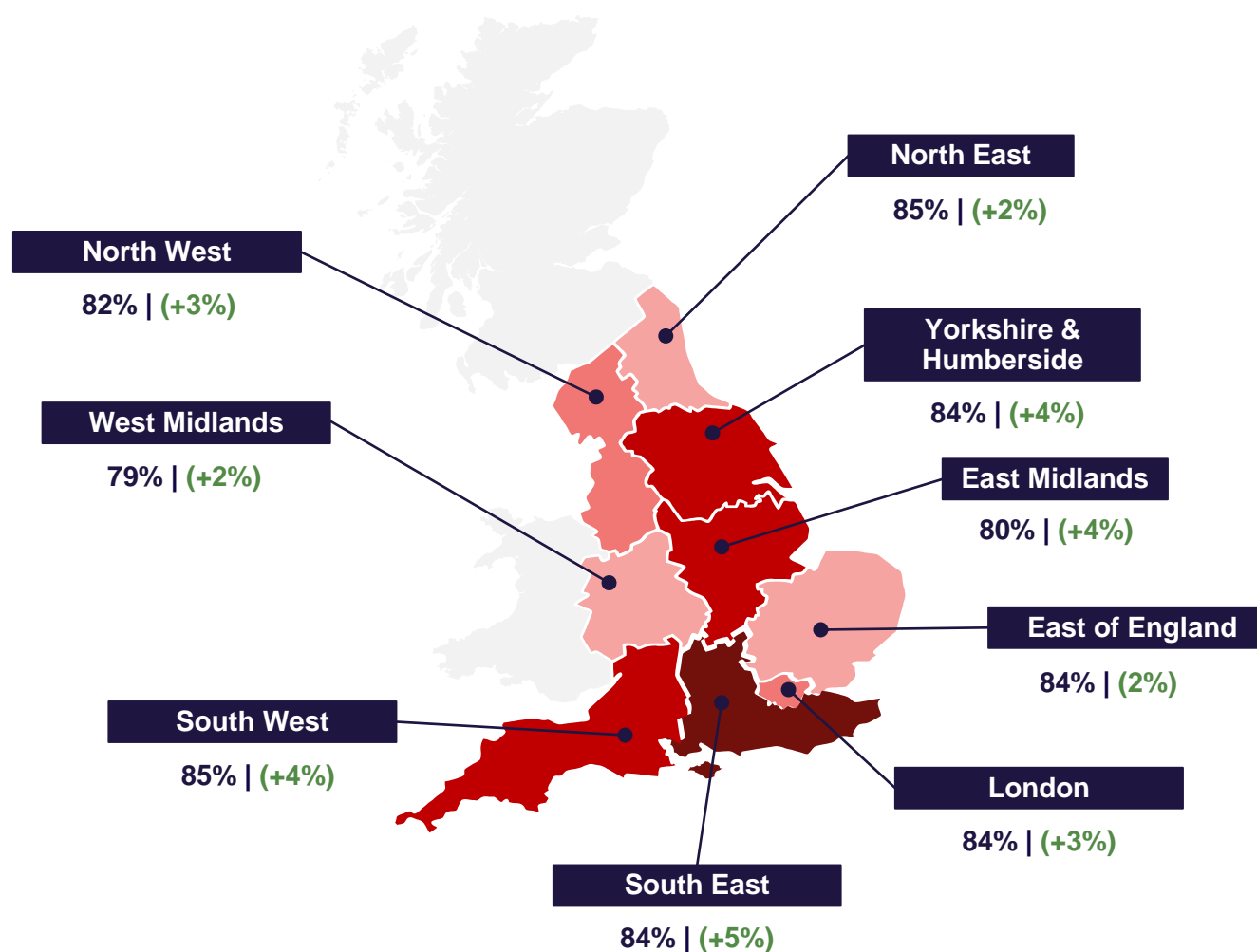


Room Occupancy by Region

At a glance – September 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 - September

Room Occupancy	2019	2021	2022	2023
East England	81%	77%	82%	84%
East Midlands	79%	77%	77%	80%
Greater London	87%	62%	82%	84%
Northeast England	80%	81%	83%	85%
Northwest England	81%	76%	79%	82%
Southeast England	83%	72%	80%	84%
Southwest England	85%	82%	81%	85%
West Midlands	79%	74%	77%	79%
Yorkshire & Humberside	81%	80%	81%	84%

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

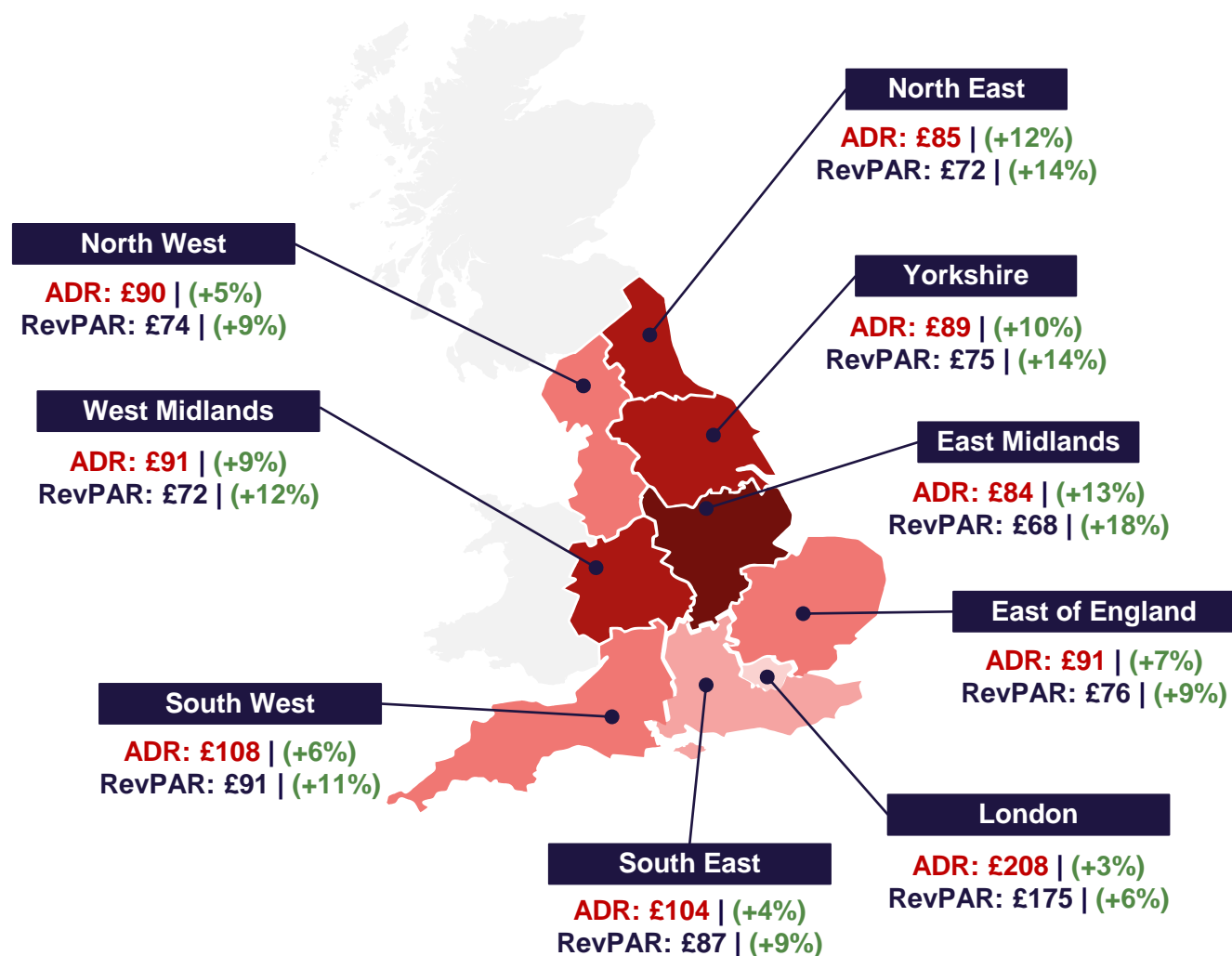


ADR and RevPAR by Region

At a glance – September 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

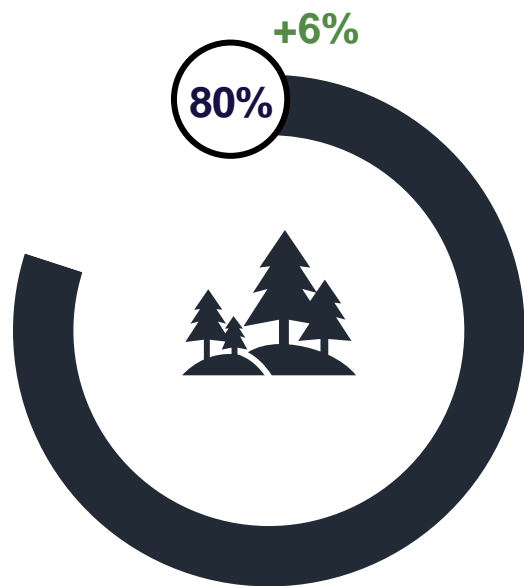
Data Tables - July

ADR	2019	2021	2022	2023	RevPAR	2019	2021	2022	2023
East England	£70.11	£83.16	£84.72	£90.77	East England	£56.86	£64.24	£69.72	£76.03
East Midlands	£65.06	£73.27	£74.42	£84.01	East Midlands	£51.24	£56.62	£57.54	£67.61
Greater London	£168.74	£138.80	£203.00	£208.48	Greater London	£146.45	£86.37	£166.05	£175.43
Northeast England	£65.13	£80.91	£75.82	£84.65	Northeast England	£52.14	£65.77	£62.91	£71.64
Northwest England	£75.04	£91.06	£85.75	£90.06	Northwest England	£60.78	£69.17	£67.67	£73.56
Southeast England	£81.19	£93.88	£99.67	£103.76	Southeast England	£67.08	£67.78	£79.52	£87.05
Southwest England	£82.44	£110.76	£101.75	£108.06	Southwest England	£70.22	£91.04	£82.47	£91.37
West Midlands	£72.43	£83.32	£83.50	£91.41	West Midlands	£57.32	£61.87	£64.57	£72.08
Yorkshire & Humberside	£67.68	£85.69	£80.76	£88.66	Yorkshire & Humberside	£55.03	£68.43	£65.38	£74.51

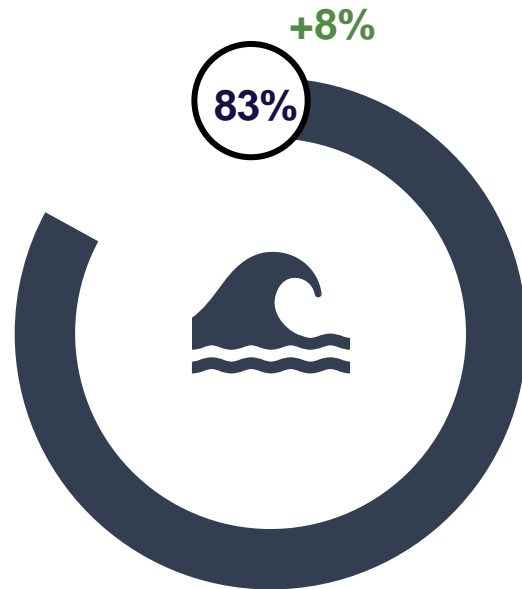
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Room Occupancy by Destination Type

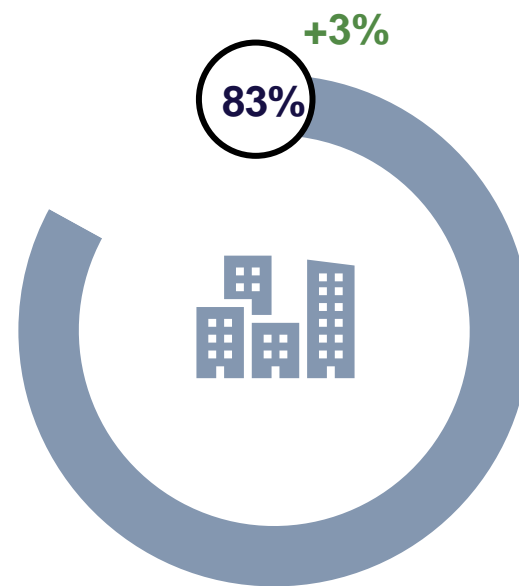
At a glance – September 2023



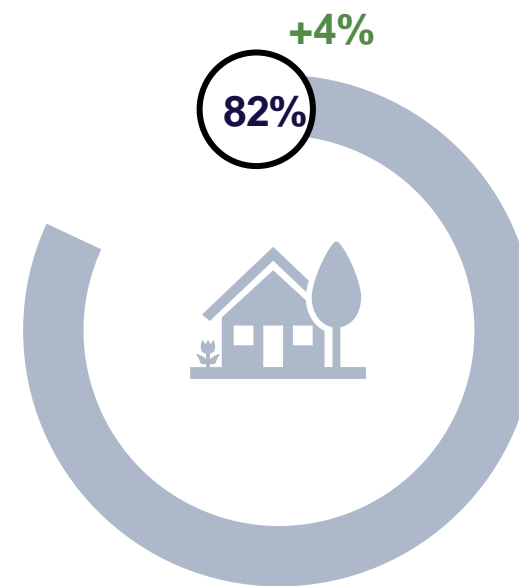
Countryside



Seaside



City / Large Town



Small Town

Room Occupancy by Destination Type

Data Tables - September

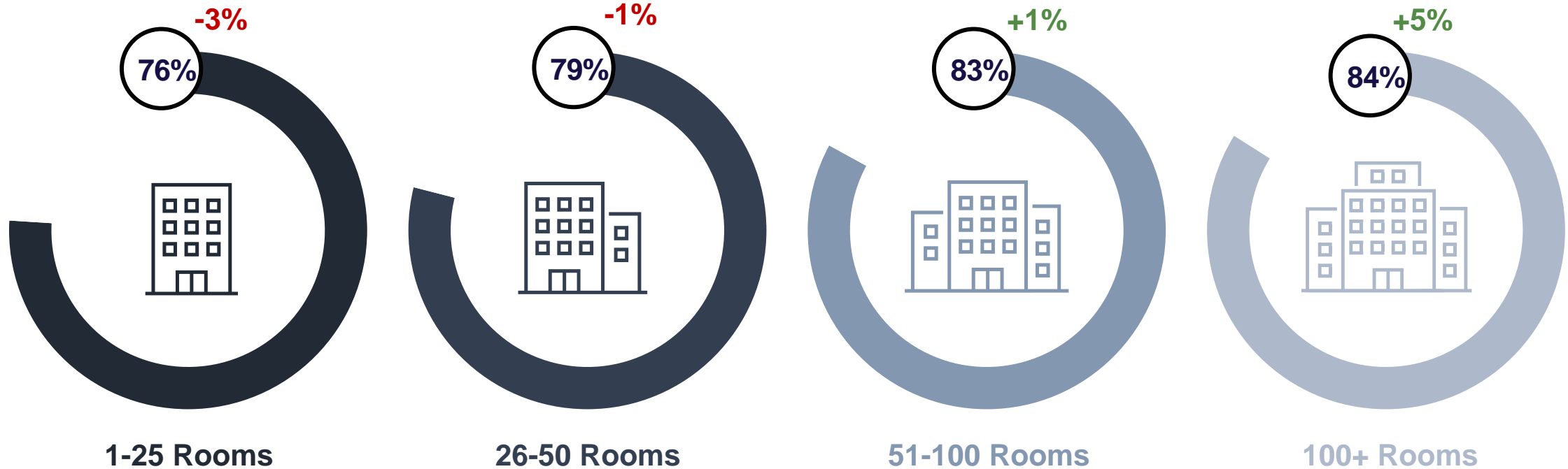
Room Occupancy	2019	2021	2022	2023
City / Large Town	83%	71%	81%	83%
Small Town	81%	75%	79%	82%
Countryside	84%	79%	75%	80%
Seaside	84%	83%	77%	83%

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



Room Occupancy by Number of Rooms

At a glance – September 2023



Room Occupancy by Number of Rooms

Data Tables - July

Room Occupancy	2019	2021	2022	2023
1 to 25 Rooms	79%	78%	78%	76%
26 to 50 Rooms	81%	79%	80%	79%
51 to 100 Rooms	82%	81%	82%	83%
101+ Rooms	84%	69%	80%	84%

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=3,559)