

# England Occupancy Survey

November 2023 Results

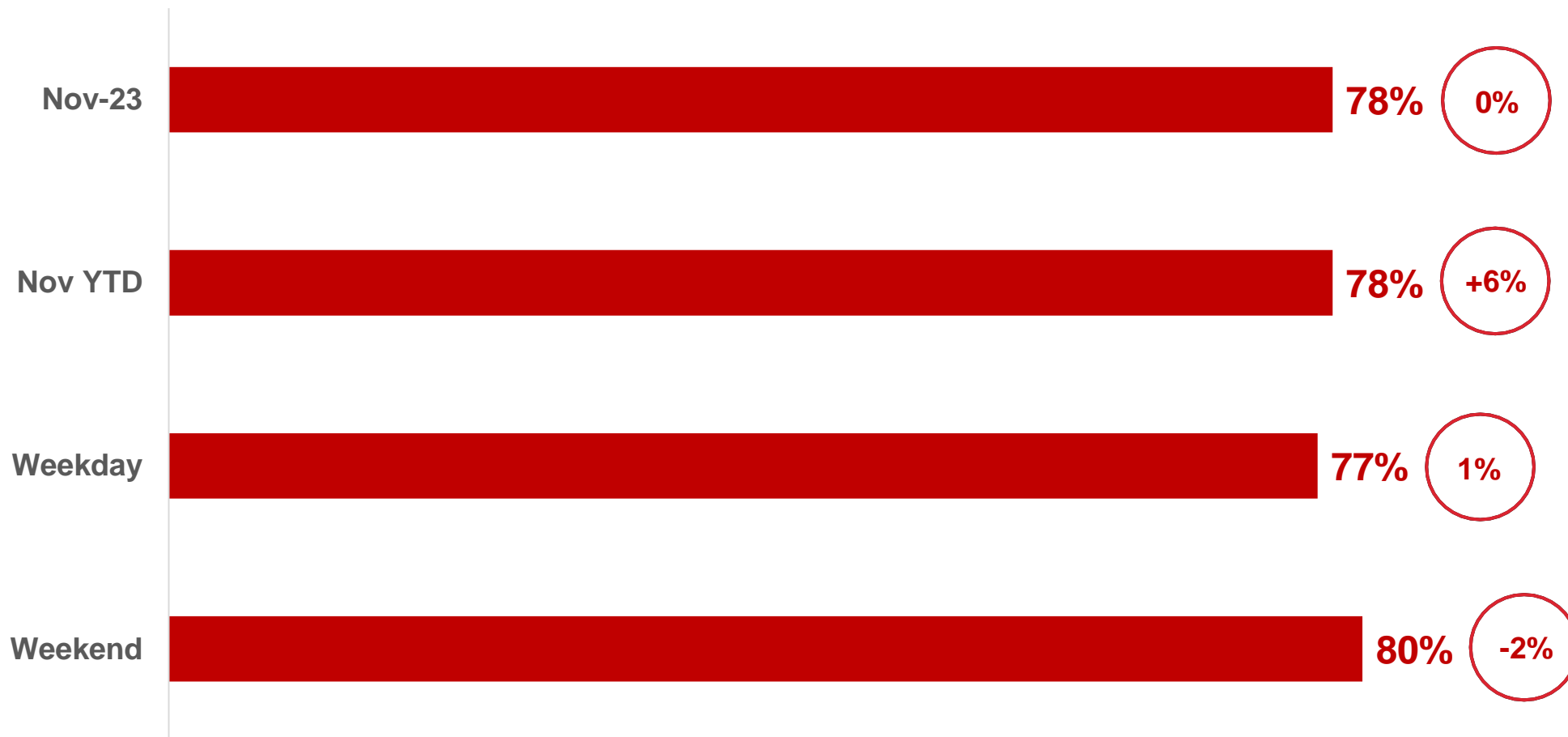
VisitEngland Research

# Summary of Results

- When comparing November 2023 results with November 2022, room occupancy remained flat at 78%, but slightly down on 2019 occupancy levels (79%).
- **Room supply** saw a small positive change (+0.2%) whilst **room demand** also increased, 0.4% compared to November 2022.
- **RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 6% to £96.23 in November 2023, when compared to the same month in 2022, sitting above annual inflation of 3.9%.
- Hotel performance by **destination type** remained flat year on year for **city / large town** and **small town** destinations, whilst **countryside** destinations which reported a 2% decrease and **seaside** a 1% decrease. Countryside occupancy is -4% on 2019 levels.
- Assessing room occupancy by **establishment size**, the smallest hotels (1-25 rooms) saw the biggest year on year decrease, with occupancy down 6% to 66%. Only the largest hotels (+100 rooms) saw an increase in November (+1%).
- **Regionally**, room occupancy was a mixed picture for November 2023 with some locations recording modest growth (+1); North West, West Midlands, London and the North East.

# England Room Occupancy

At a glance – November 2023



**x%** % change from same period in previous year

# England Room Occupancy

## Data Tables - November

<b>Room Occupancy</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
November	79%	67%	78%	78%
November YTD	78%	53%	74%	78%
Weekday	77%	64%	77%	77%
Weekend	81%	76%	81%	80%

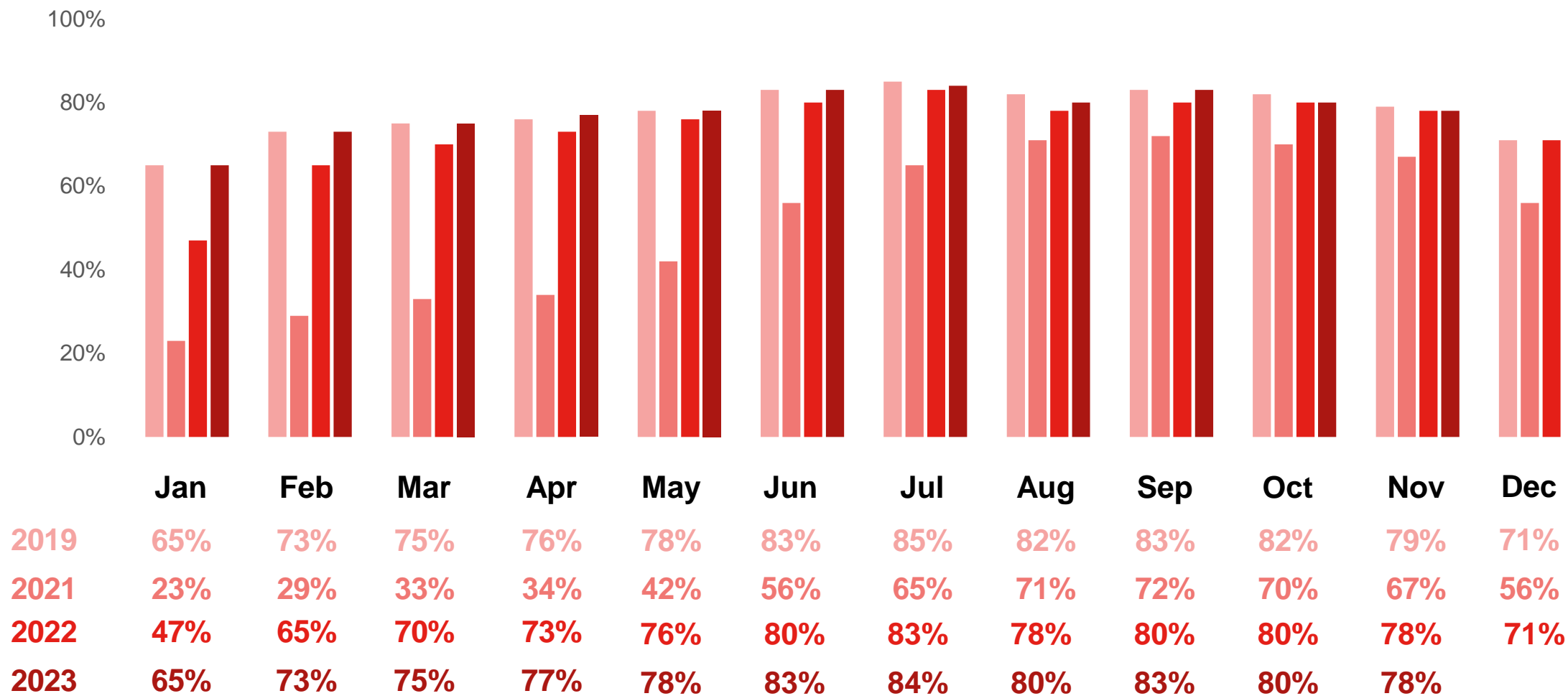
<b>Room Supply and Room Demand</b> <i>Year-on-year relative % change</i>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>Room Supply</b>	<b>1.7%</b>	<b>21.4%</b>	<b>0.9%</b>	<b>0.2%</b>
<b>Room Demand</b>	<b>1.7%</b>	<b>196.9%</b>	<b>17.1%</b>	<b>0.4%</b>

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



# England Room Occupancy

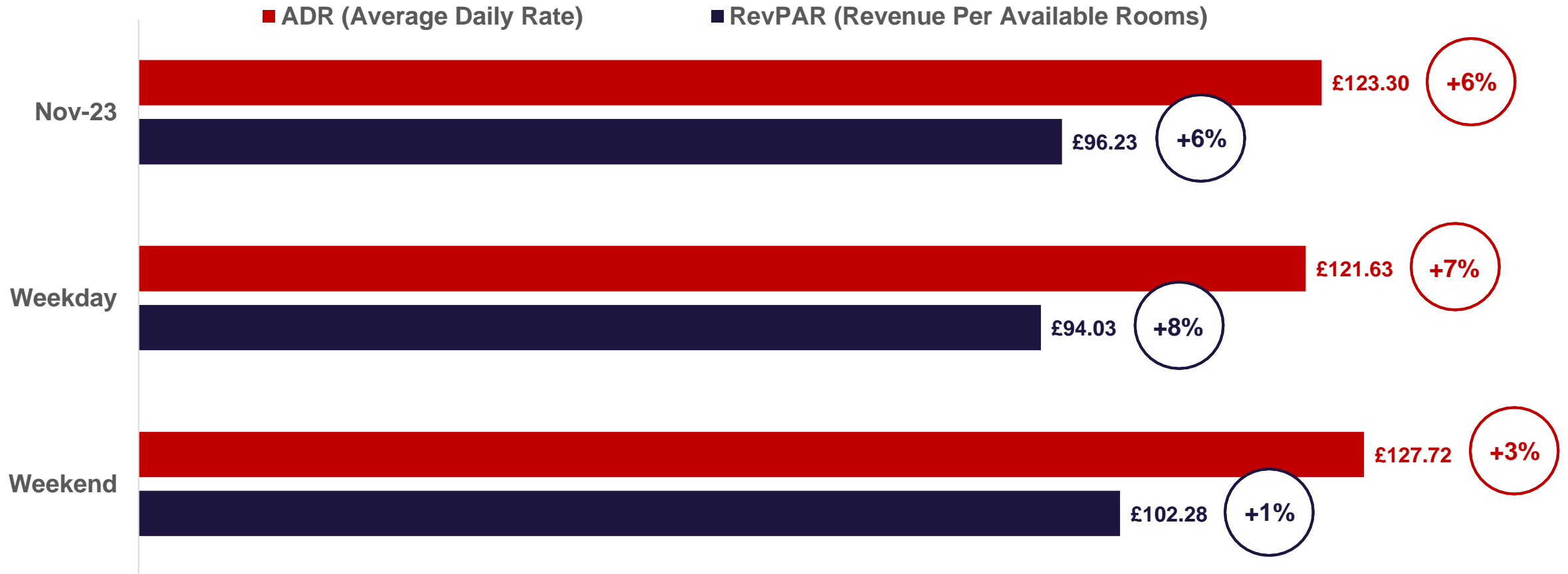
## England Room Occupancy by Month



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



# England ADR and RevPAR



# England ADR and RevPAR

Data Tables - November

<b>ADR</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>November</b>	£99.27	£98.23	£116.38	£123.30
<b>Weekday</b>	£100.13	£92.76	£113.28	£121.63
<b>Weekend</b>	£97.63	£111.00	£124.19	£127.72

<b>RevPAR</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>November</b>	£78.15	£66.20	£90.69	£96.23
<b>Weekday</b>	£77.49	£59.67	£87.25	£94.03
<b>Weekend</b>	£79.47	£84.16	£101.15	£102.28

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

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

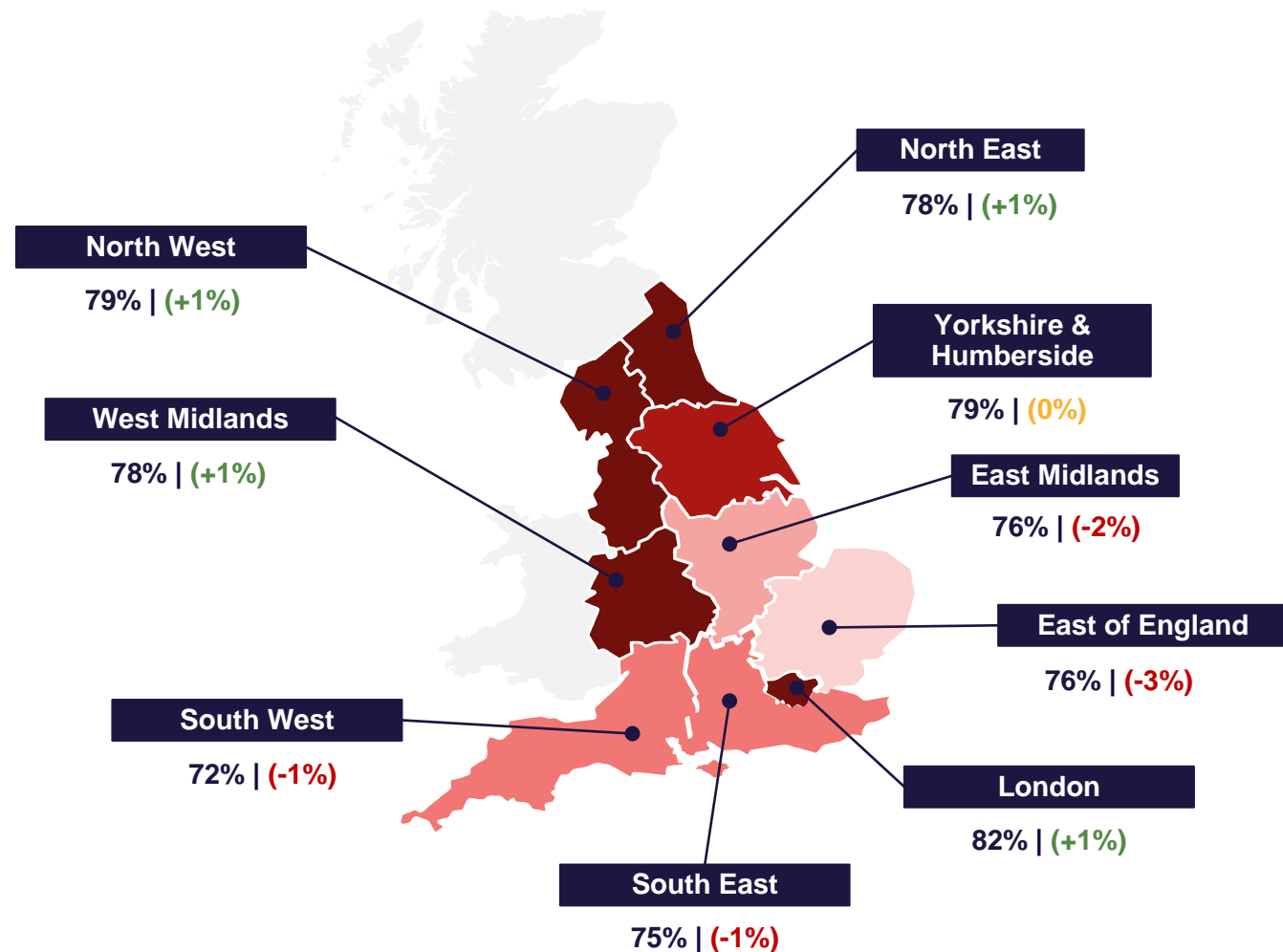


# Room Occupancy by Region

## At a glance – November 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 - November

<b>Room Occupancy</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>East England</b>	75%	71%	79%	76%
<b>East Midlands</b>	75%	72%	77%	76%
<b>Greater London</b>	86%	66%	81%	82%
<b>Northeast England</b>	75%	72%	77%	78%
<b>Northwest England</b>	78%	70%	78%	79%
<b>Southeast England</b>	73%	62%	75%	75%
<b>Southwest England</b>	73%	68%	73%	72%
<b>West Midlands</b>	79%	68%	77%	78%
<b>Yorkshire &amp; Humberside</b>	80%	74%	79%	79%

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



# ADR and RevPAR by Region

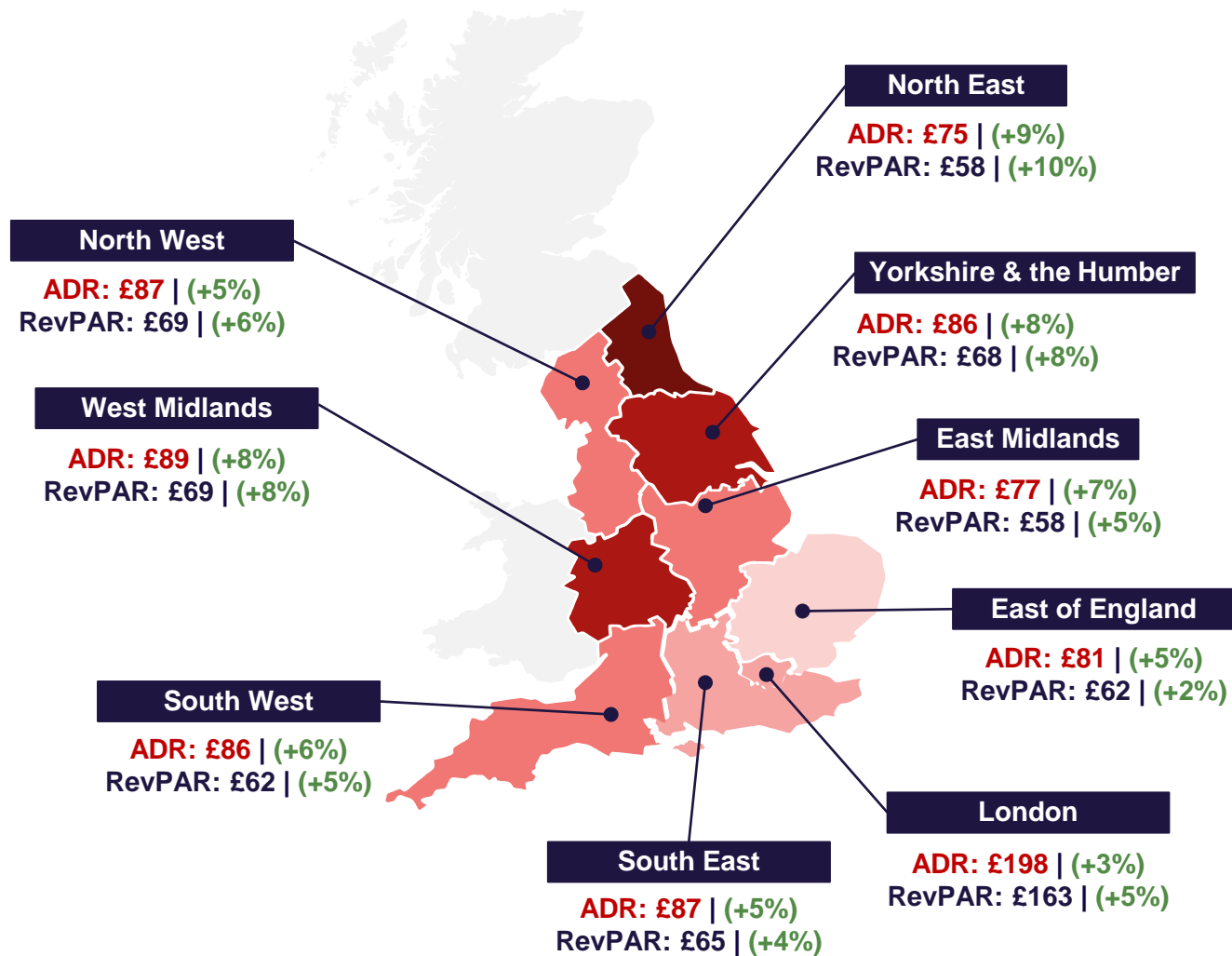
At a glance – November 2023

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)



UK annual inflation rate in November 2023 was **3.9%**



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



# ADR and RevPAR by Region

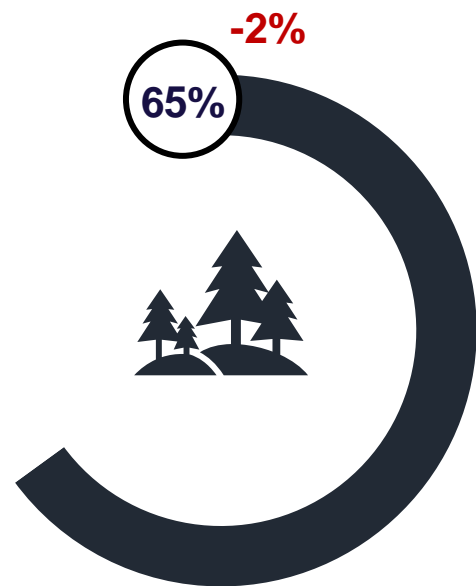
## Data Tables - November

<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>	£66.05	£71.86	£76.91	£80.77	<b>East England</b>	£49.66	£51.31	£60.40	£61.52
<b>East Midlands</b>	£62.00	£66.90	£71.71	£77.03	<b>East Midlands</b>	£46.45	£48.05	£55.39	£58.27
<b>Greater London</b>	£157.60	£152.24	£191.87	£198.12	<b>Greater London</b>	£134.78	£100.13	£155.25	£162.62
<b>Northeast England</b>	£60.64	£67.99	£68.63	£74.76	<b>Northeast England</b>	£45.72	£48.98	£52.94	£58.19
<b>Northwest England</b>	£73.91	£80.37	£83.20	£87.25	<b>Northwest England</b>	£57.62	£56.18	£64.50	£68.53
<b>Southeast England</b>	£71.29	£77.77	£82.45	£86.79	<b>Southeast England</b>	£52.03	£48.57	£62.19	£64.75
<b>Southwest England</b>	£70.76	£81.50	£81.74	£86.37	<b>Southwest England</b>	£51.82	£55.30	£59.32	£62.19
<b>West Midlands</b>	£72.14	£78.08	£82.97	£89.28	<b>West Midlands</b>	£57.06	£53.20	£63.90	£69.23
<b>Yorkshire &amp; Humberside</b>	£66.76	£76.29	£79.63	£86.04	<b>Yorkshire &amp; Humberside</b>	£53.20	£56.67	£63.18	£68.08

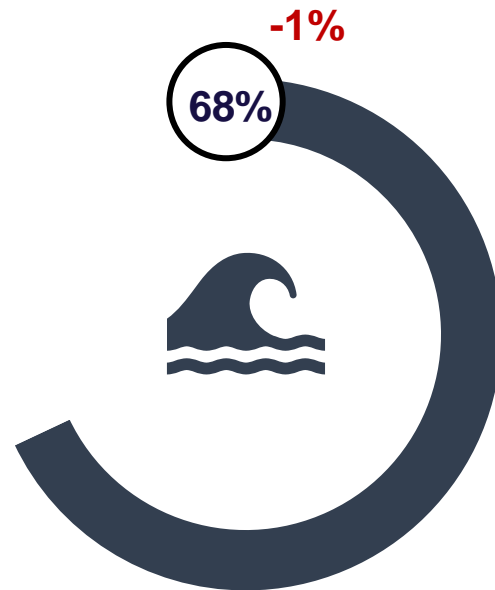
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# Room Occupancy by Destination Type

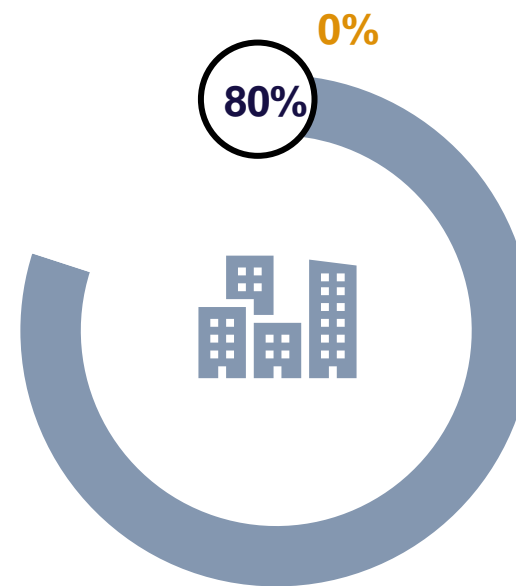
At a glance – November 2023



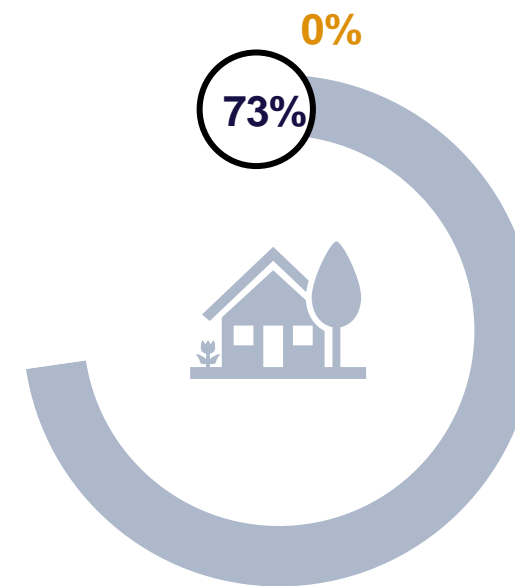
Countryside



Seaside



City / Large Town



Small Town

# Room Occupancy by Destination Type

## Data Tables - November

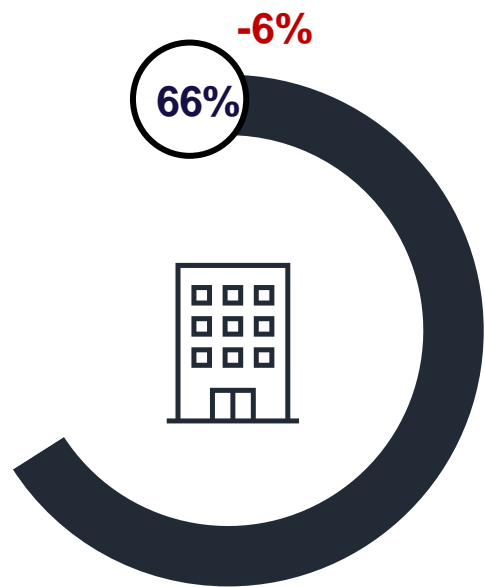
<b>Room Occupancy</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>City / Large Town</b>	80%	68%	79%	80%
<b>Small Town</b>	72%	63%	73%	73%
<b>Countryside</b>	69%	64%	66%	65%
<b>Seaside</b>	70%	68%	69%	68%

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# Room Occupancy by Number of Rooms

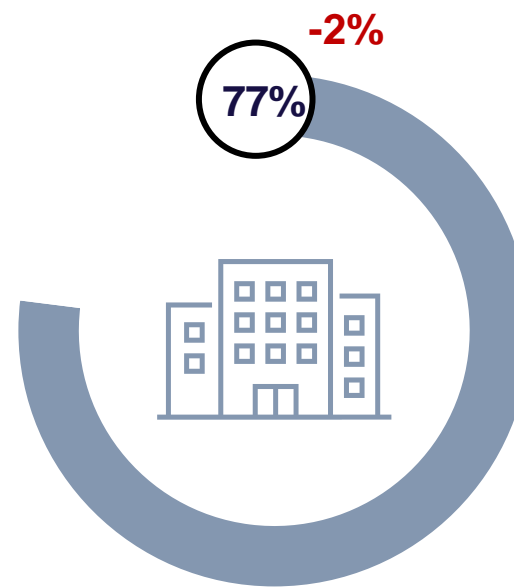
At a glance – November 2023



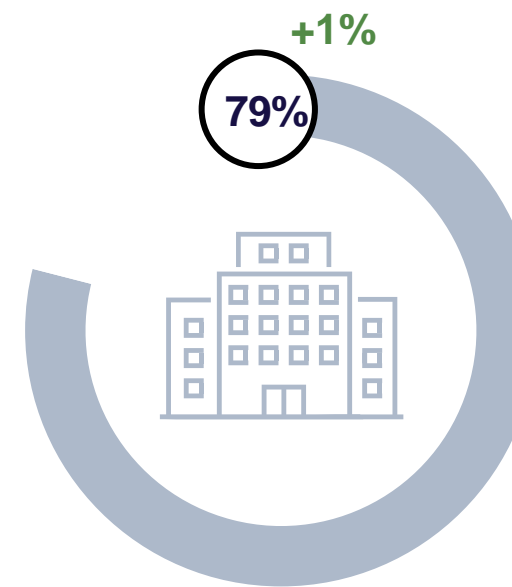
1-25 Rooms



26-50 Rooms



51-100 Rooms



100+ Rooms

# Room Occupancy by Number of Rooms

## Data Tables - November

<b>Room Occupancy</b>	<b>2019</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>1 to 25 Rooms</b>	70%	67%	70%	66%
<b>26 to 50 Rooms</b>	74%	69%	74%	71%
<b>51 to 100 Rooms</b>	77%	74%	79%	77%
<b>101+ Rooms</b>	80%	65%	78%	79%

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=3,554)