

England Occupancy Survey

December 2023 Results

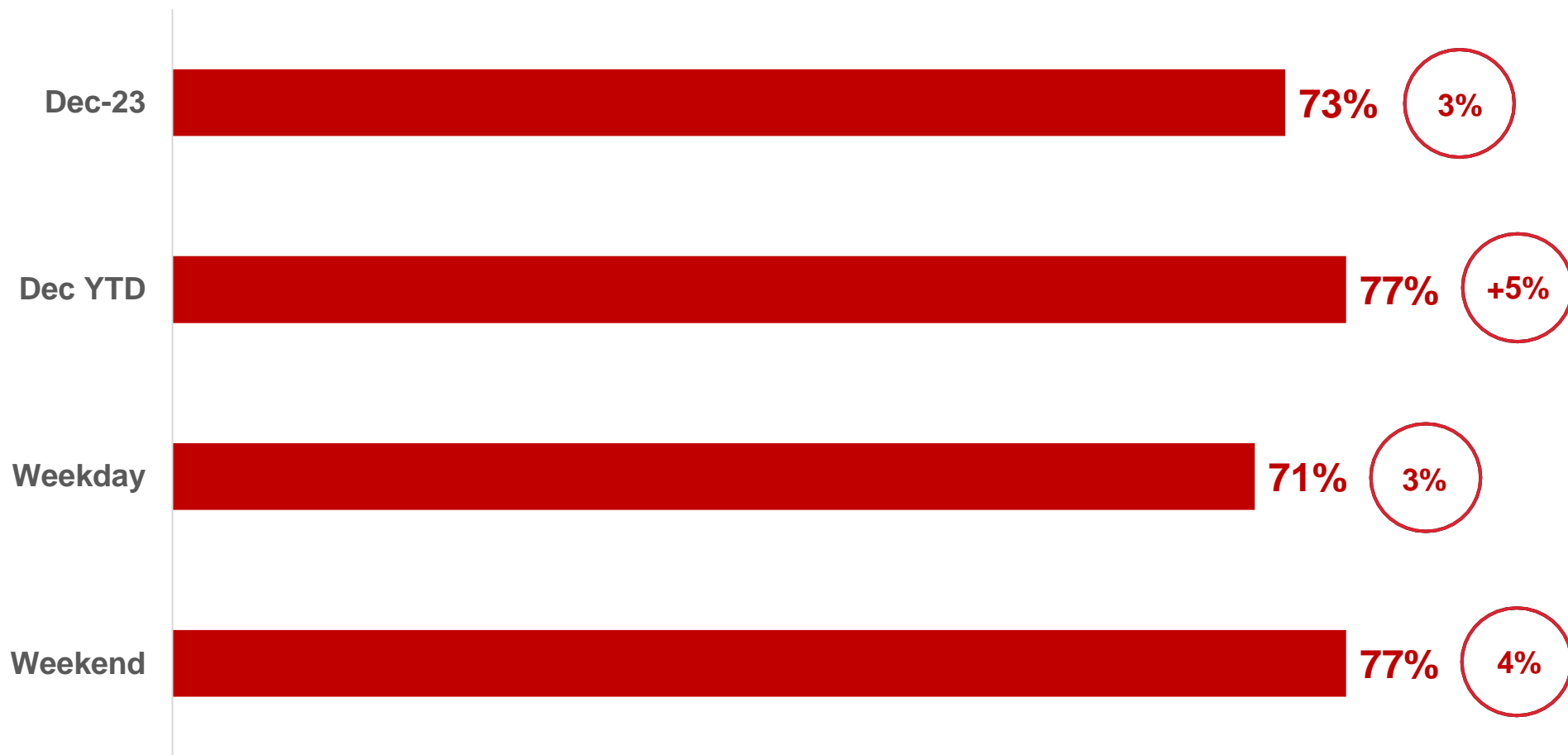
VisitEngland Research

Summary of Results

- When comparing December 2023 results with December 2022, room occupancy was up 3% to 73%. December 2023 was also up on 2019 occupancy levels (71%) for the first time this year.
- **Room supply** saw a small positive change (+0.1%) whilst **room demand** also increased, more substantially, to 3.4% compared to December 2022.
- **RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 9% to £93.01 in December 2023, when compared to the same month in 2022, sitting above annual inflation of 4.0%.
- All **destination types** saw an increase in occupancy in December 2023, with countryside locations reporting the largest increase of 6% to 65%. City/large town occupancy continues to be highest overall at 74%, up 3% on December 2022.
- Assessing room occupancy by **establishment size**, the smallest hotels (1-25 rooms and 25-50 room) saw declines year on year, whilst the largest hotels (+100 rooms) saw an increase of 5% in December, to 74%.
- **Regionally**, room occupancy was up for most regions year on year, with the North West, North East and London recording the highest growth. London and the South West hotel occupancy was on par with 2019 levels, whilst all other regions were above, for December 2023.

England Room Occupancy

At a glance – December 2023



x% % change from same period in previous year

England Room Occupancy

Data Tables - December

Room Occupancy	2019	2021	2022	2023
December	71%	56%	71%	73%
December YTD	78%	53%	73%	77%
Weekday	68%	53%	69%	71%
Weekend	78%	63%	74%	77%

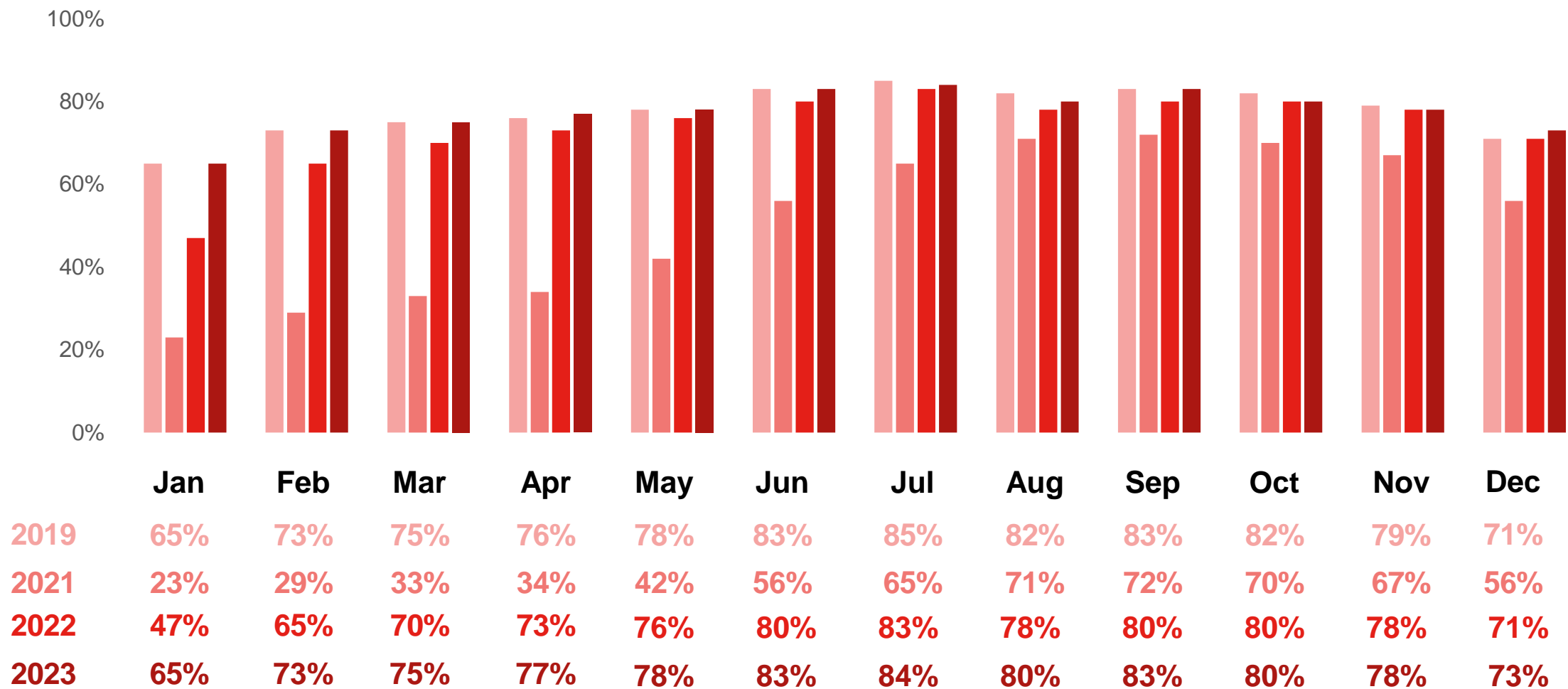
Room Supply and Room Demand Year-on-year relative % change	2019	2021	2022	2023
Room Supply	1.7%	13.2%	1.4%	0.1%
Room Demand	-0.1%	139.2%	27.5%	3.4%

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



England Room Occupancy

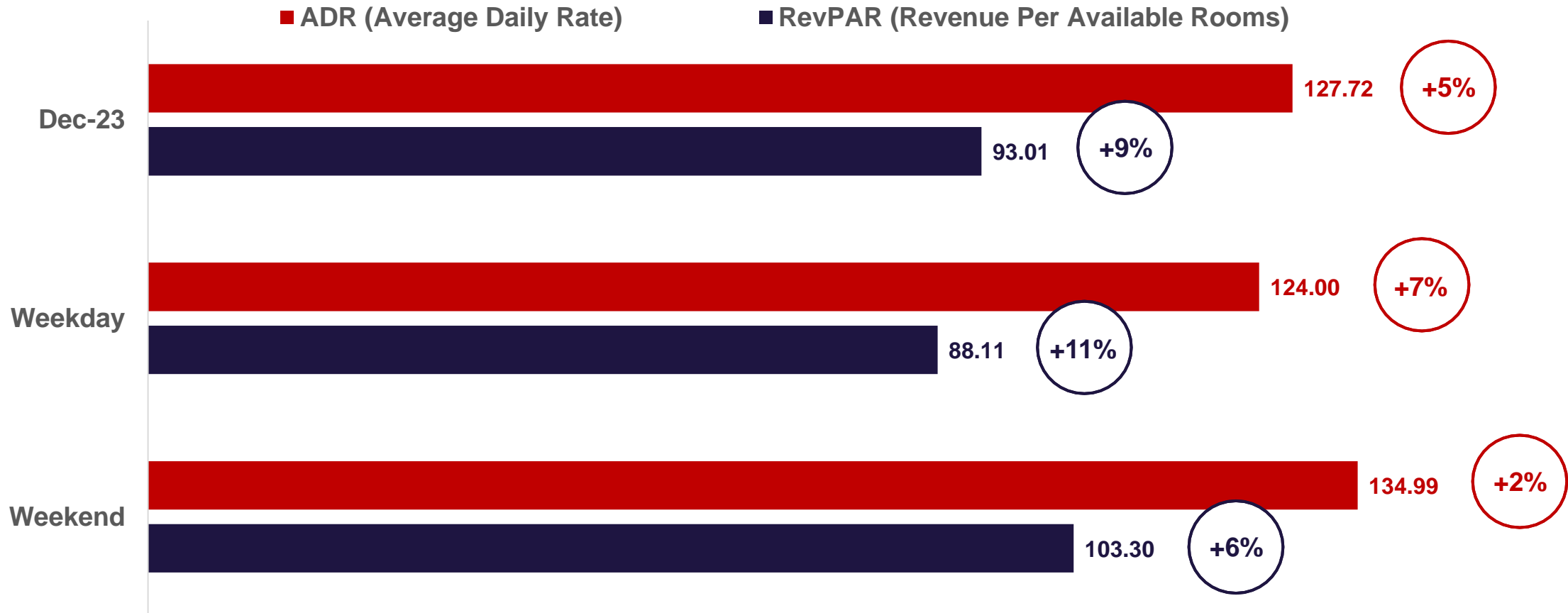
England Room Occupancy by Month



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



England ADR and RevPAR



England ADR and RevPAR

Data Tables - December

ADR	2019	2021	2022	2023
December	£98.86	£97.50	£121.30	£127.72
Weekday	£99.60	£91.31	£115.25	£124.00
Weekend	£97.03	£110.27	£132.77	£134.99

RevPAR	2019	2021	2022	2023
December	£70.00	£54.89	£85.54	£93.01
Weekday	£67.93	£48.80	£79.87	£88.11
Weekend	£75.94	£69.79	£98.00	£103.30

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

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

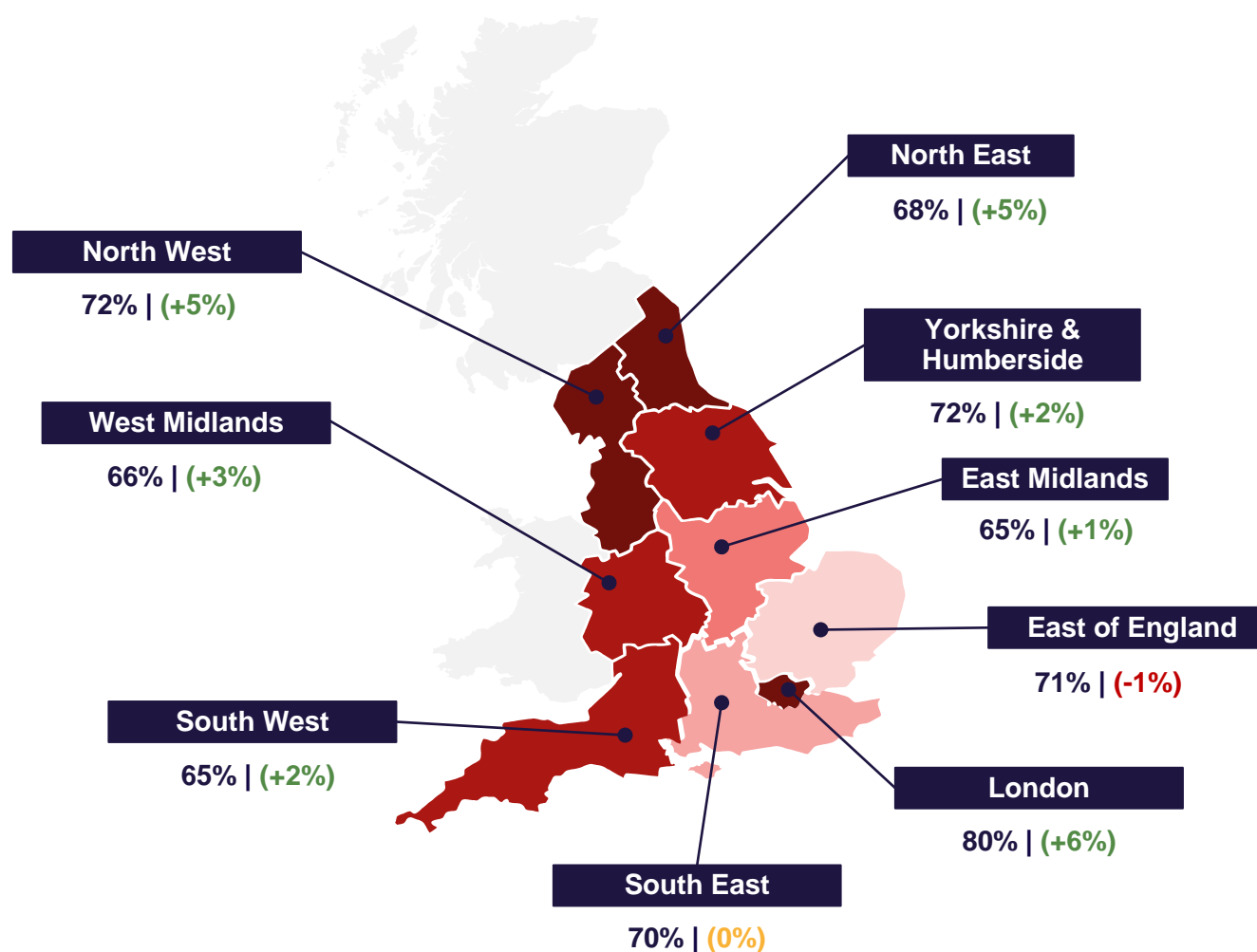


Room Occupancy by Region

At a glance – December 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 - December

Room Occupancy	2019	2021	2022	2023
East England	68%	60%	72%	71%
East Midlands	64%	58%	65%	65%
Greater London	80%	53%	76%	80%
Northeast England	63%	58%	64%	68%
Northwest England	69%	60%	68%	72%
Southeast England	67%	55%	70%	70%
Southwest England	65%	58%	64%	65%
West Midlands	64%	54%	64%	66%
Yorkshire & Humberside	69%	62%	71%	72%

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



ADR and RevPAR by Region

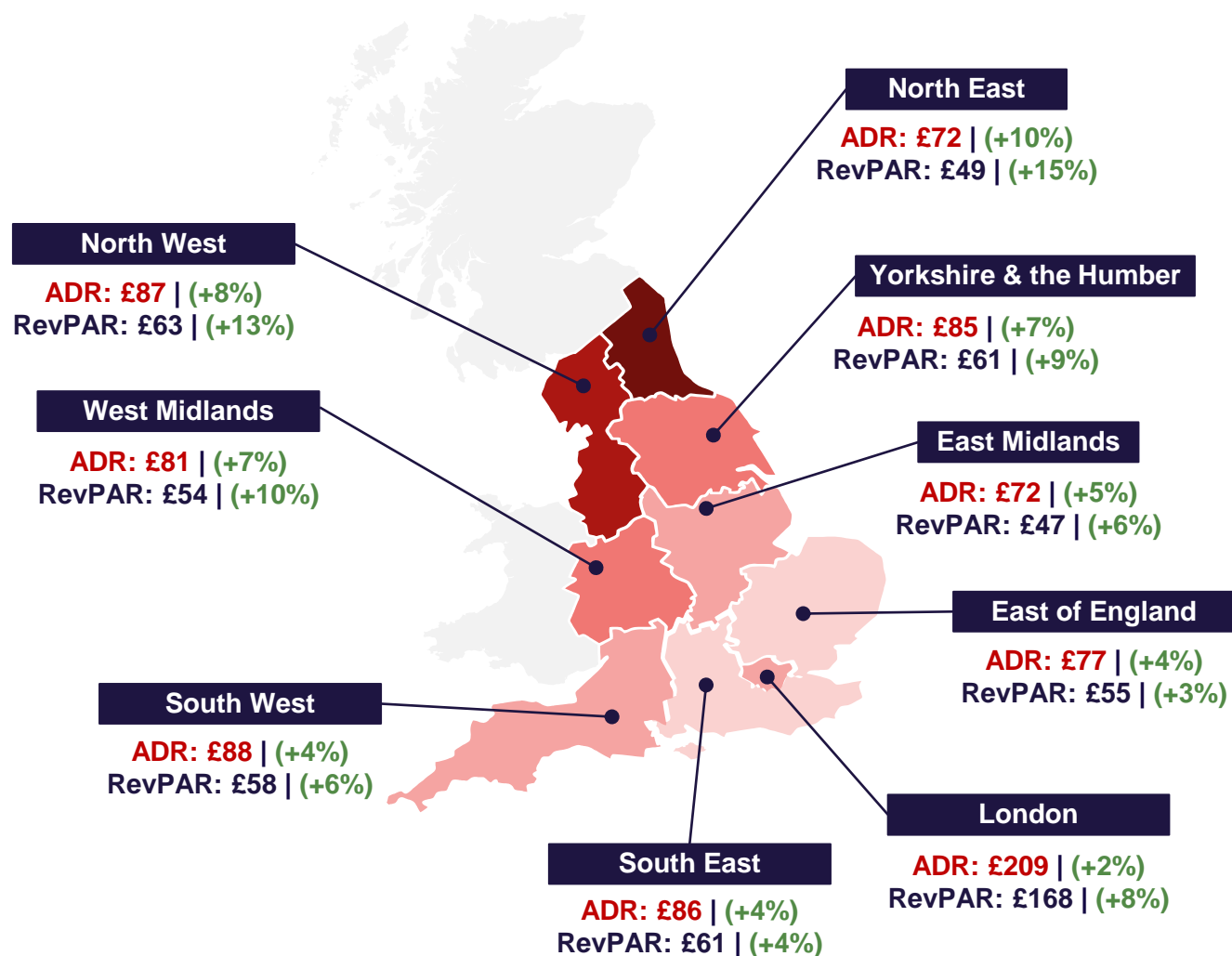
At a glance – December 2023

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 December 2023 was **4.0%**



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



ADR and RevPAR by Region

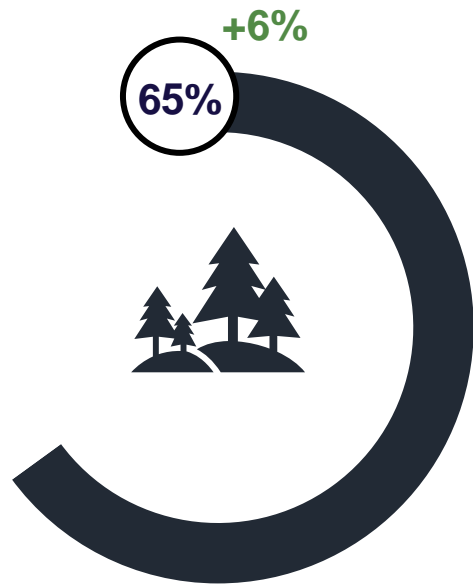
Data Tables - December

ADR	2019	2021	2022	2023	RevPAR	2019	2021	2022	2023
East England	£62.42	£68.81	£74.15	£76.87	East England	£42.23	£41.36	£53.23	£54.57
East Midlands	£59.67	£63.61	£67.95	£71.68	East Midlands	£38.00	£36.94	£44.07	£46.81
Greater London	£157.88	£153.69	£204.43	£208.58	Greater London	£126.99	£81.37	£155.28	£167.66
Northeast England	£56.59	£64.82	£66.07	£72.36	Northeast England	£35.63	£37.46	£42.39	£48.91
Northwest England	£71.05	£80.13	£80.92	£87.26	Northwest England	£49.19	£48.23	£55.33	£62.52
Southeast England	£68.74	£78.08	£83.10	£86.10	Southeast England	£45.72	£42.80	£58.47	£60.68
Southwest England	£70.79	£81.08	£84.43	£88.11	Southwest England	£45.80	£46.87	£54.32	£57.69
West Midlands	£64.63	£71.26	£75.92	£81.28	West Midlands	£41.26	£38.74	£48.80	£53.61
Yorkshire & Humberside	£64.60	£75.56	£80.12	£85.40	Yorkshire & Humberside	£44.78	£47.07	£56.50	£61.38

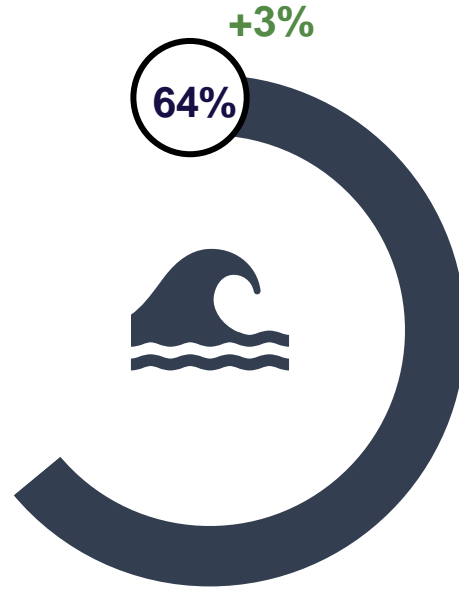
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Room Occupancy by Destination Type

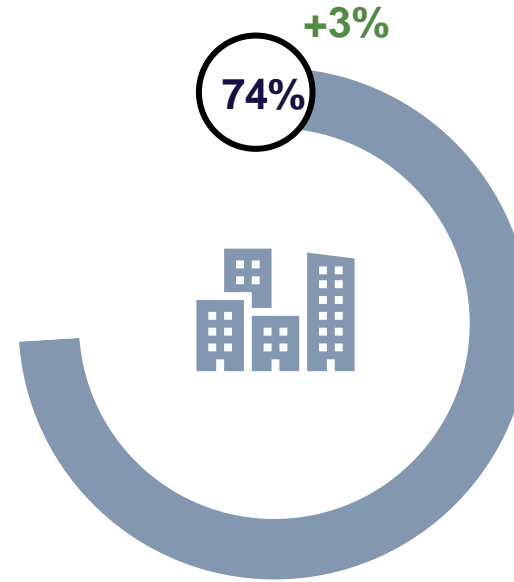
At a glance – December 2023



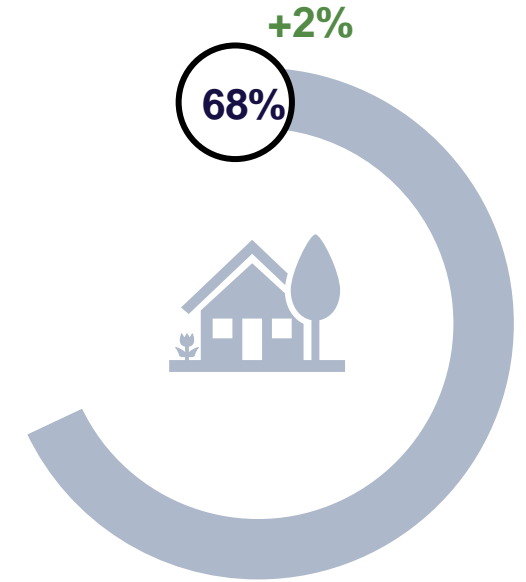
Countryside



Seaside



City / Large Town



Small Town

Room Occupancy by Destination Type

Data Tables - December

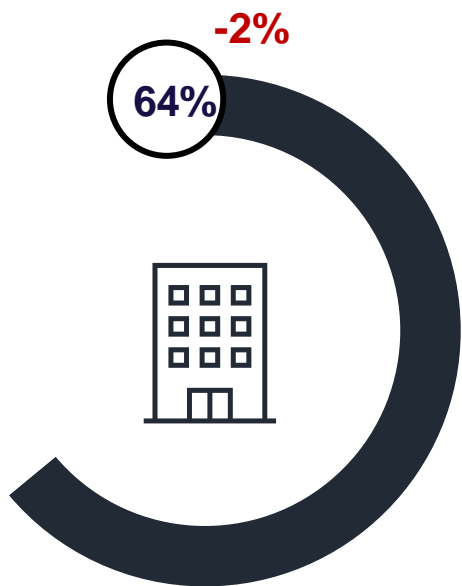
Room Occupancy	2019	2021	2022	2023
City / Large Town	72%	56%	72%	74%
Small Town	65%	56%	67%	68%
Countryside	61%	54%	62%	65%
Seaside	64%	59%	62%	64%

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



Room Occupancy by Number of Rooms

At a glance – December 2023



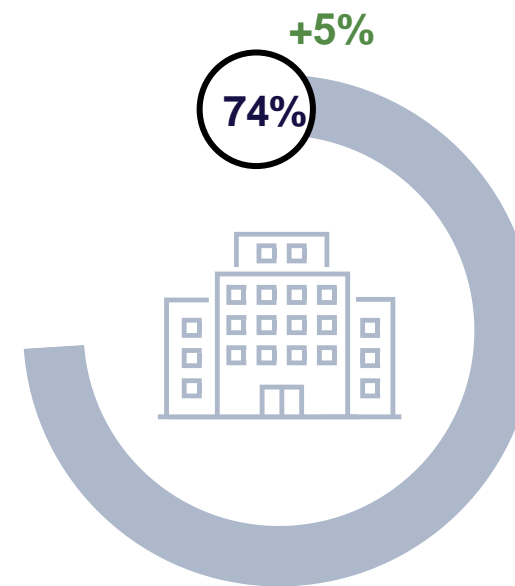
1-25 Rooms



26-50 Rooms



51-100 Rooms



100+ Rooms

Room Occupancy by Number of Rooms

Data Tables - December

Room Occupancy	2019	2021	2022	2023
1 to 25 Rooms	66%	58%	66%	64%
26 to 50 Rooms	66%	58%	67%	67%
51 to 100 Rooms	69%	64%	72%	72%
101+ Rooms	72%	54%	70%	74%

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=3,544)