

VisitEngland™



England Occupancy Survey

March 2023 Results

Created by





Summary of Results

When comparing March 2023 results with March 2022, **room occupancy** in March 2023 increased from 70% to 75%, whilst **bedspace occupancy** increased from 48% to 52%. In March 2023, **room supply** increased by 0.7% (in relative terms), when compared with March 2022. Meanwhile, **room demand** increased by 7.5% (in relative terms), when compared with March 2022.

RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 16% to £83.19 in March 2023, when compared with the same month last year.

Evaluating trends across the **9 regions** of England, all regions achieved increased room occupancy compared with the same month last year. The three regions that recorded the greatest change in room occupancy from last year were Southeast England, which increased occupancy from 67% to 74%, followed by Greater London, which increased occupancy from 71% to 77%, and East England, which increased occupancy from 74% to 78%.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most from 71% to 76%, followed by Small Town hotel occupancy, which increased from 69% to 72%. March occupancy dropped two percentage points in Seaside hotels, which fell from 69% to 67%, and in Countryside hotels, falling from 66% to 64%.

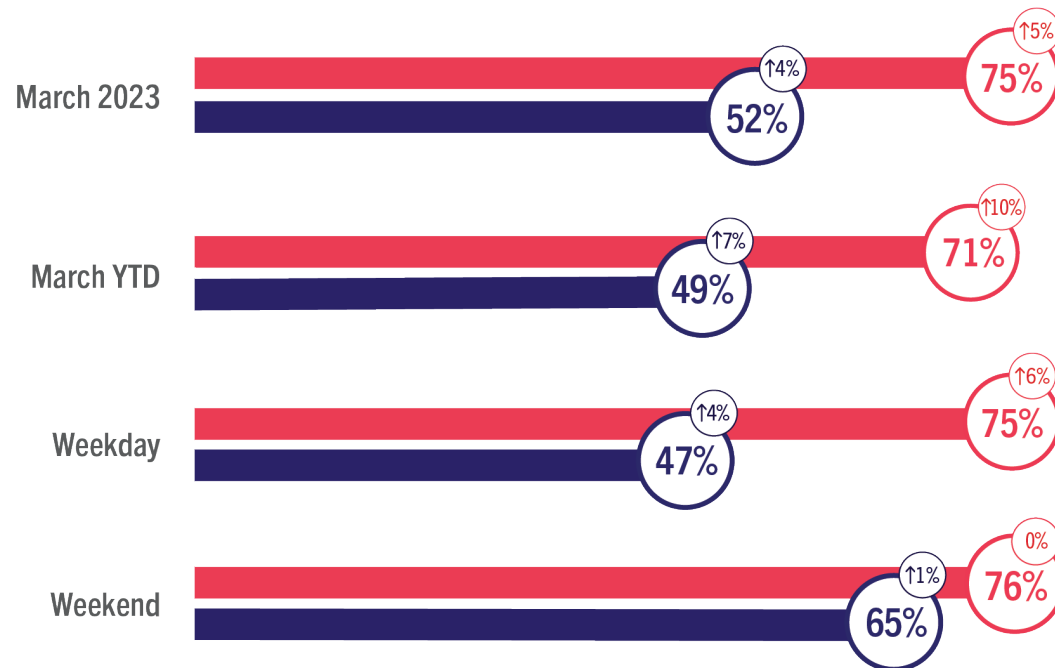
Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most from 69% to 75%, followed by hotels with 26-50 rooms, which increased occupancy from 70% to 71%, and hotels with 51-100 rooms which increased occupancy from 75% to 76%. The only decline from last year was recorded for hotels with 1-25 rooms as occupancy decreased from 68% to 67%.

Throughout this report occupancy comparisons with last year are in absolute terms. Meanwhile, ADR and RevPAR year-on-year comparisons are in relative terms. Please see the Methodology Statement for more information on this, and regarding the data during the Covid-19 pandemic.

England Room and Bedspace Occupancy

At a glance - March 2023

● Room ● Bedspace Ⓢ % Change



*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 - March

Room Occupancy

	2019	2021	2022	2023
March	75%	33%	70%	75%
March YTD	71%	28%	61%	71%
Weekday	74%	37%	69%	75%
Weekend	76%	21%	75%	76%

Bedspace Occupancy

	2019	2021	2022	2023
March	52%	22%	48%	52%
March YTD	50%	19%	43%	49%
Weekday	46%	23%	43%	47%
Weekend	65%	18%	65%	65%

Room supply and room demand

Year-on-year relative percentage change

	2019	2021	2022	2023
Room Supply	2.1%	-21.7%	26.6%	0.7%
Room Demand	1.9%	-30.5%	174.0%	7.5%

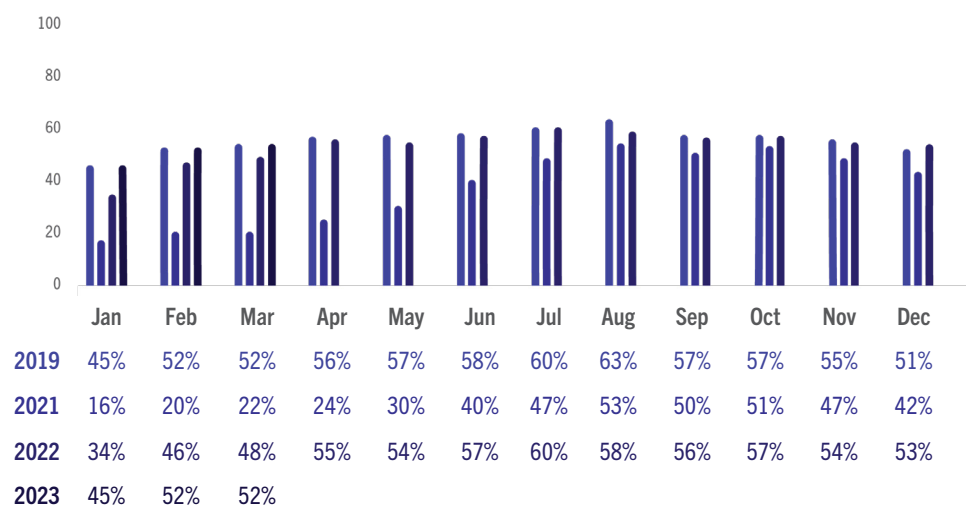


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



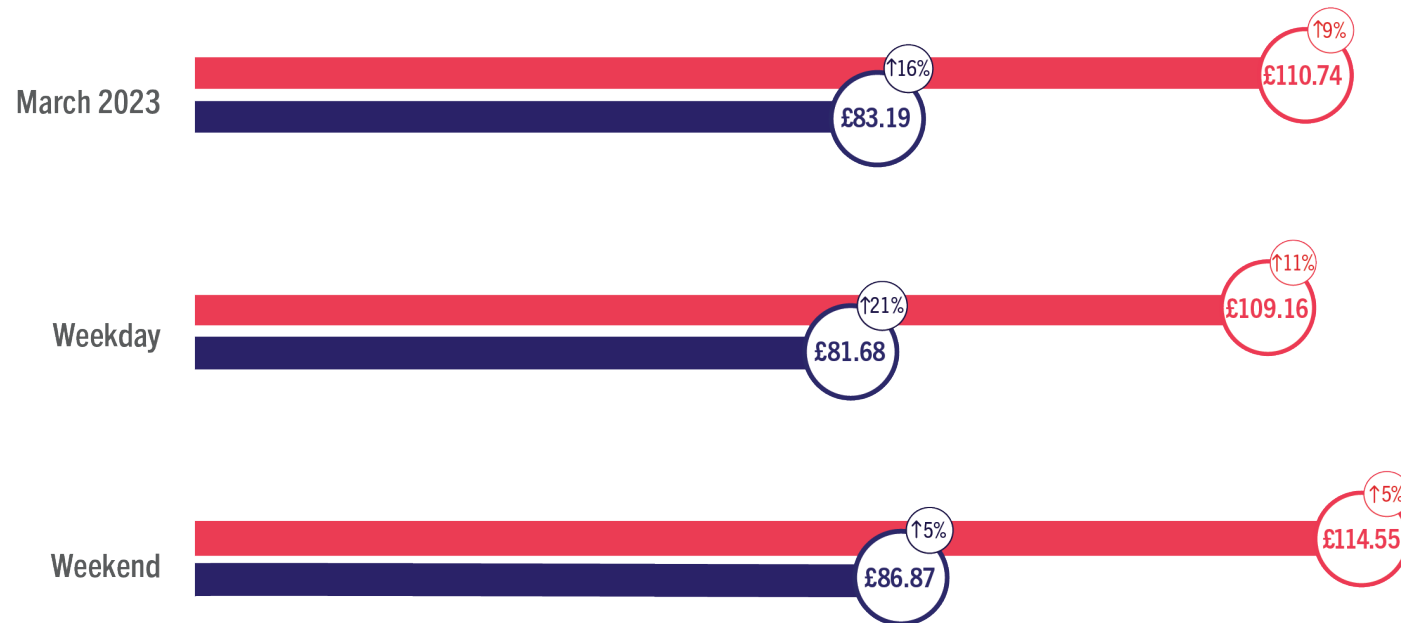
England Bedspace Occupancy by Month



England ADR and RevPAR

At a glance - March 2023

● ADR ● RevPAR ⓘ % Change



*Please note: ADR and RevPAR year-on-year percentage changes are shown in relative terms.

England ADR and RevPAR

Data Tables – March

ADR

	2019	2021	2022	2023
March	£91.12	£48.30	£101.57	£110.74
Weekday	£93.32	£48.08	£98.69	£109.16
Weekend	£86.67	£49.42	£109.11	£114.55

RevPAR

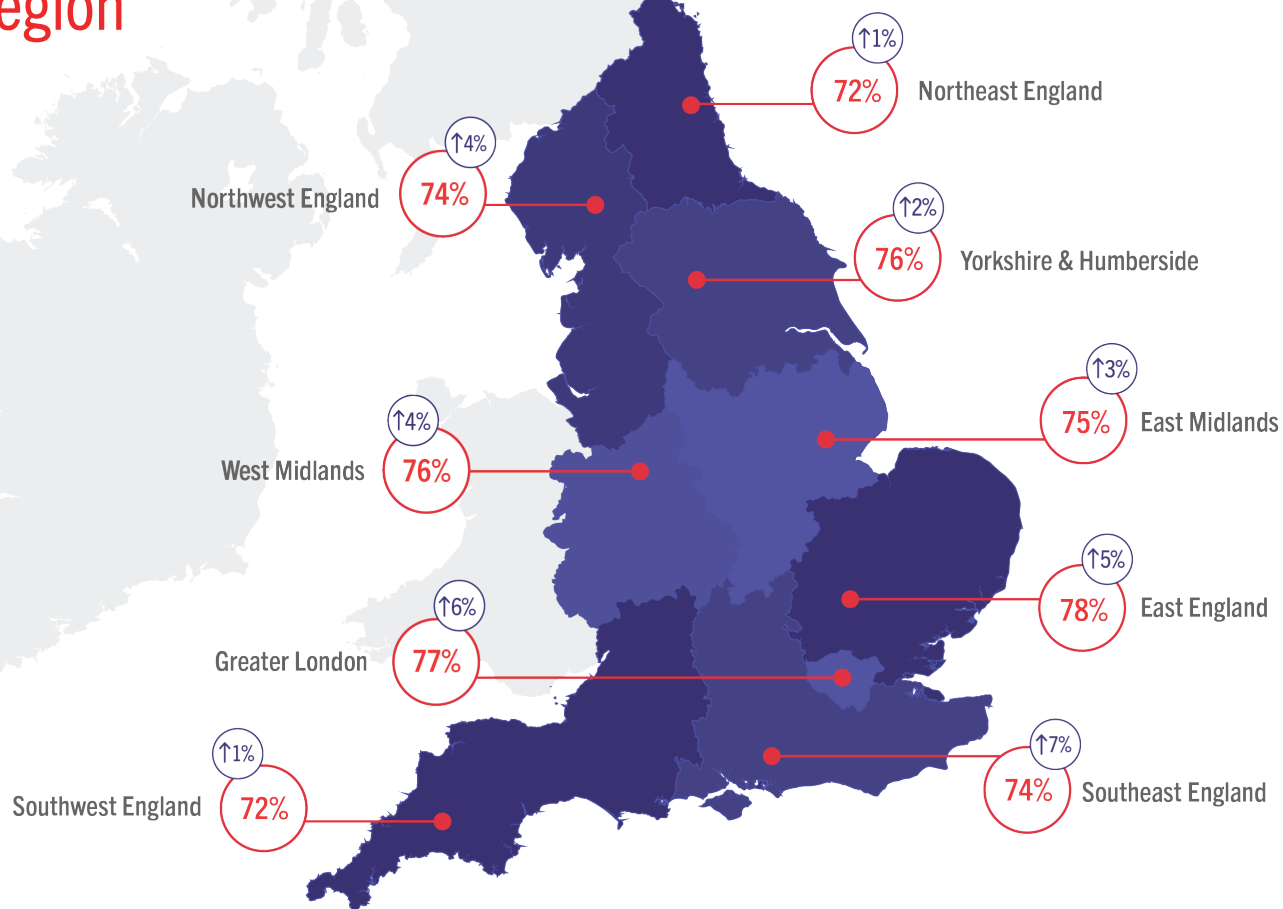
	2019	2021	2022	2023
March	£68.11	£15.71	£71.54	£83.19
Weekday	£68.97	£17.58	£67.77	£81.68
Weekend	£66.30	£10.34	£82.35	£86.87



Room Occupancy By Region

At a glance - March 2023

*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 - March

Room Occupancy

	2019	2021	2022	2023
East England	72%	43%	74%	78%
East Midlands	72%	36%	72%	75%
Greater London	81%	26%	71%	77%
Northeast England	66%	30%	71%	72%
Northwest England	73%	28%	69%	74%
Southeast England	72%	37%	67%	74%
Southwest England	72%	39%	71%	72%
West Midlands	73%	29%	72%	76%
Yorkshire & Humberside	72%	30%	73%	76%

Bedspace Occupancy

	2019	2021	2022	2023
East England	50%	30%	51%	54%
East Midlands	50%	24%	49%	52%
Greater London	58%	18%	49%	54%
Northeast England	47%	21%	49%	50%
Northwest England	51%	19%	48%	51%
Southeast England	50%	25%	45%	51%
Southwest England	50%	27%	48%	49%
West Midlands	49%	19%	47%	50%
Yorkshire & Humberside	51%	21%	51%	53%

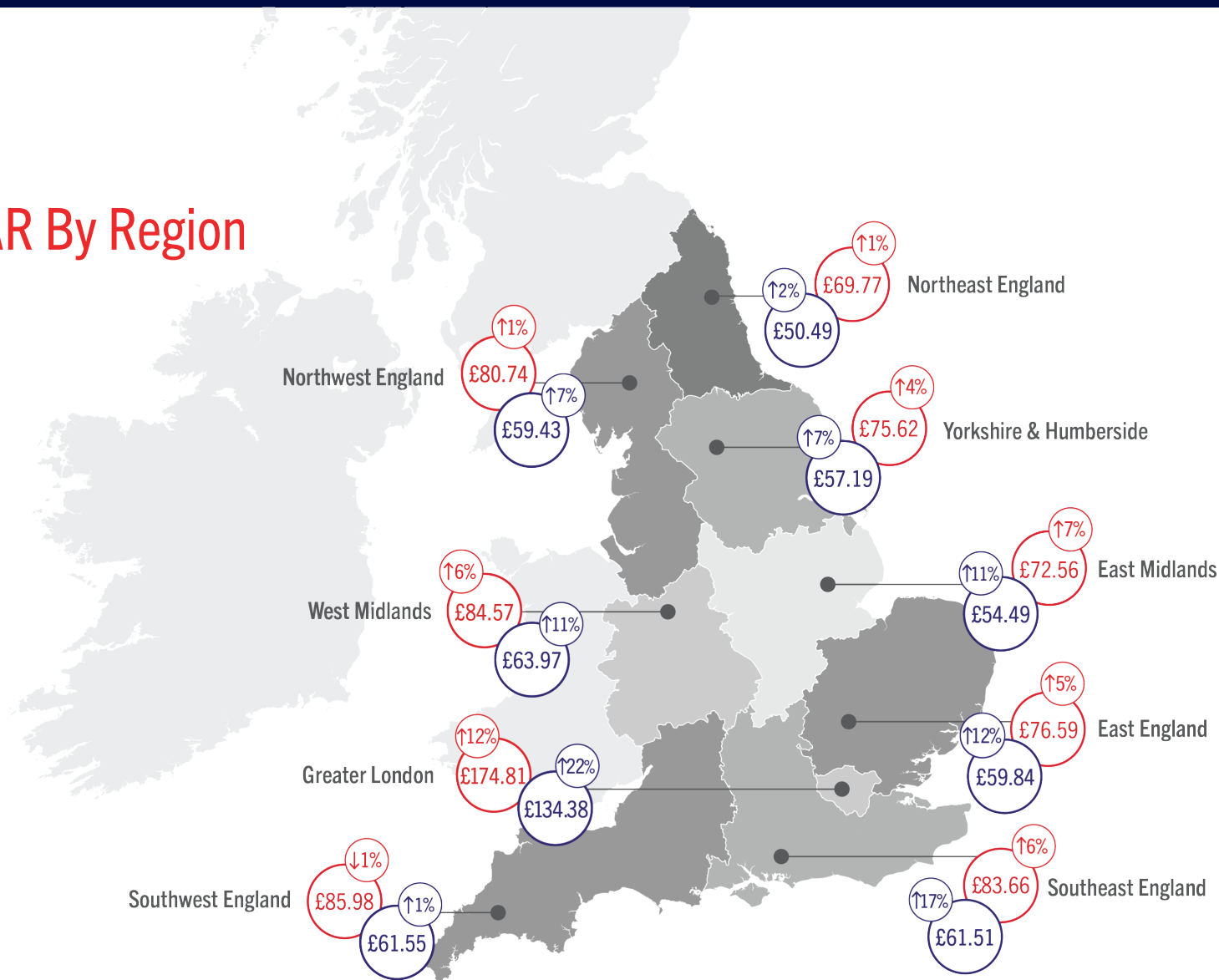


ADR and RevPAR By Region

At a glance - March 2023

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

● ADR ● RevPAR ⊕ % Change





ADR and RevPAR By Region

Data Tables - March

ADR

	2019	2021	2022	2023
East England	£64.16	£45.13	£72.81	£76.59
East Midlands	£59.95	£44.55	£67.69	£72.56
Greater London	£137.88	£61.00	£156.47	£174.81
Northeast England	£57.96	£44.28	£69.17	£69.77
Northwest England	£69.46	£46.89	£79.68	£80.74
Southeast England	£70.55	£45.60	£78.92	£83.66
Southwest England	£71.73	£45.46	£86.55	£85.98
West Midlands	£69.01	£44.27	£79.65	£84.57
Yorkshire & Humberside	£60.54	£43.15	£72.85	£75.62

RevPAR

	2019	2021	2022	2023
East England	£45.93	£19.50	£53.53	£59.84
East Midlands	£42.93	£16.16	£48.97	£54.49
Greater London	£112.27	£15.66	£110.57	£134.38
Northeast England	£38.39	£13.41	£49.37	£50.49
Northwest England	£50.54	£13.28	£55.36	£59.43
Southeast England	£50.61	£16.98	£52.57	£61.51
Southwest England	£51.37	£17.84	£61.21	£61.55
West Midlands	£50.38	£12.97	£57.38	£63.97
Yorkshire & Humberside	£43.47	£13.11	£53.49	£57.19



Room Occupancy By Destination Type

At a glance - March 2023



Countryside



Seaside



Small Town



City / Large Town

*Please note: As of February 2019 occupancy percentage changes are expressed in absolute terms. For more information please see 'Methodology Statement' on page 16.

Occupancy By Destination Type

Data Tables - March

Room Occupancy

	2019	2021	2022	2023
City / Large Town	76%	31%	71%	76%
Small Town	70%	38%	69%	72%
Countryside	67%	43%	66%	64%
Seaside	69%	39%	69%	67%

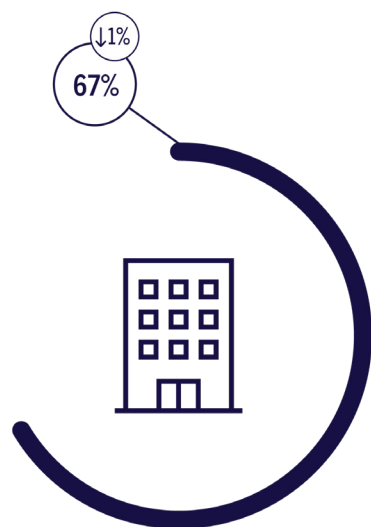
Bedspace Occupancy

	2019	2021	2022	2023
City / Large Town	53%	21%	48%	52%
Small Town	50%	27%	49%	52%
Countryside	45%	29%	44%	43%
Seaside	51%	28%	49%	49%



Room Occupancy By Number of Rooms

At a glance - March 2023



1-25 Rooms



26-50 Rooms



51-100 Rooms



101+ Rooms

*Please note: As of February 2019 occupancy percentage changes are expressed in absolute terms. For more information please see 'Methodology Statement' on page 16.

Occupancy By Number of Rooms

Data Tables - March

Room Occupancy

	2019	2021	2022	2023
1 to 25 Rooms	69%	39%	68%	67%
26 to 50 Rooms	71%	45%	70%	71%
51 to 100 Rooms	72%	46%	75%	76%
101+ Rooms	76%	27%	69%	75%

Bedspace Occupancy

	2019	2021	2022	2023
1 to 25 Rooms	50%	28%	48%	48%
26 to 50 Rooms	51%	31%	49%	50%
51 to 100 Rooms	53%	33%	54%	55%
101+ Rooms	53%	18%	47%	52%

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 and bedspace 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 therefore only based on those hotels that were open and reported data to STR (N=3,510).

VisitEngland™



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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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