

VisitEngland™



England Occupancy Survey

February 2023 Results

Created by





Summary of Results

When comparing February 2023 results with February 2022, **room occupancy** in February 2023 increased from 65% to 73%, whilst **bedspace occupancy** increased from 46% to 52%. In February 2023, **room supply** increased by 1.1% (in relative terms), when compared with February 2022. Meanwhile, **room demand** increased by 14.1% (in relative terms), when compared with February 2022.

RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 33% to £75.75 in February 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 four regions that recorded the greatest change in room occupancy from last year were Greater London, which increased occupancy from 58% to 73%, followed by East England, which increased occupancy from 69% to 77%, Southeast England, which increased occupancy from 64% to 72% and West Midlands which increased 67% to 73%.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most from 65% to 74%, followed by Small Town hotel occupancy, which increased from 65% to 70%. Both Countryside and Seaside hotel occupancy gained a single occupancy percentage point, with Country increasing from 63% to 64% and Seaside hotels increasing from 68% to 69%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most from 62% to 73%. Remaining hotel sizes gained just under four occupancy points year-over-year. Hotels with 1-25 rooms increased occupancy from 64% to 67%, whilst hotels with 26-50 rooms increased occupancy from 67% to 70%, whilst hotels with 51-100 rooms increased occupancy from 73% to 76%.

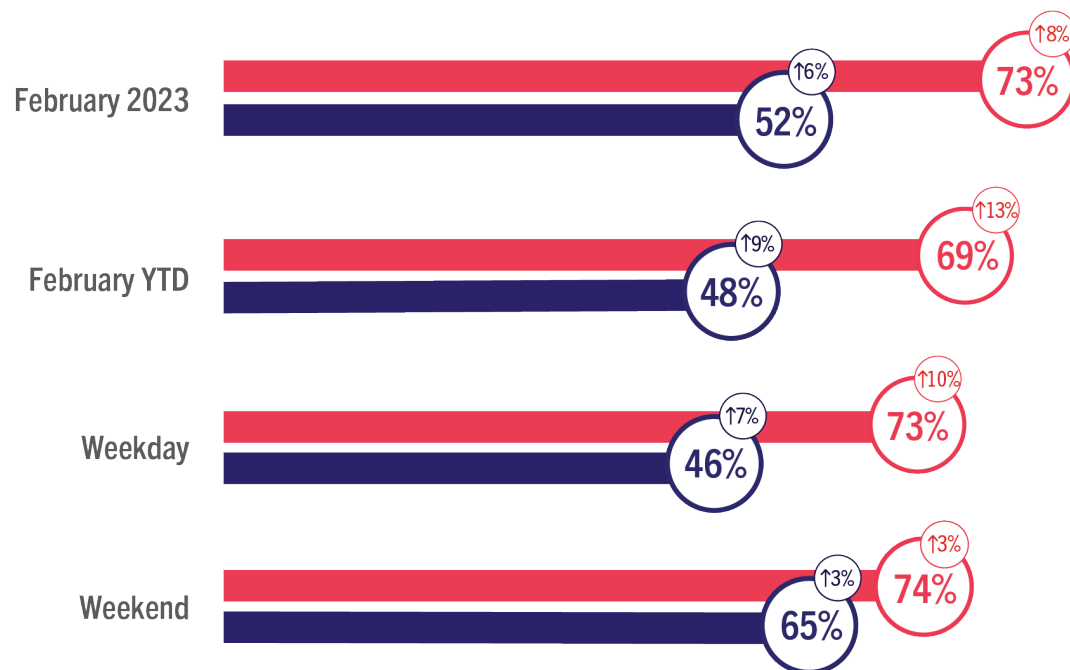
Throughout this report occupancy comparisons with last year are in absolute terms. Meanwhile, ADR and RevPAR year-on-year comparisons are in relative terms. Please see the Methodology Statement for more information on this, and regarding the data during the Covid-19 pandemic.



England Room and Bedspace Occupancy

At a glance - February 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 - February

Room Occupancy

	2019	2021	2022	2023
February	73%	29%	65%	73%
February YTD	69%	26%	56%	69%
Weekday	74%	33%	62%	73%
Weekend	73%	20%	71%	74%

Bedspace Occupancy

	2019	2021	2022	2023
February	52%	20%	46%	52%
February YTD	48%	18%	40%	48%
Weekday	47%	21%	40%	46%
Weekend	64%	17%	62%	65%

Room supply and room demand

Year-on-year relative percentage change	2019	2021	2022	2023
Room Supply	2.3%	-23.3%	28.7%	1.1%
Room Demand	2.0%	-69.3%	187.4%	14.1%

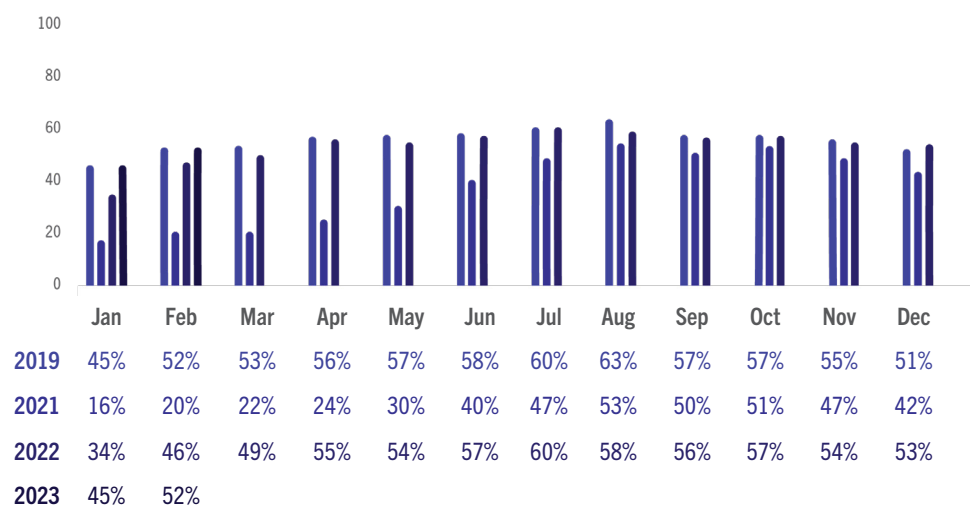


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month

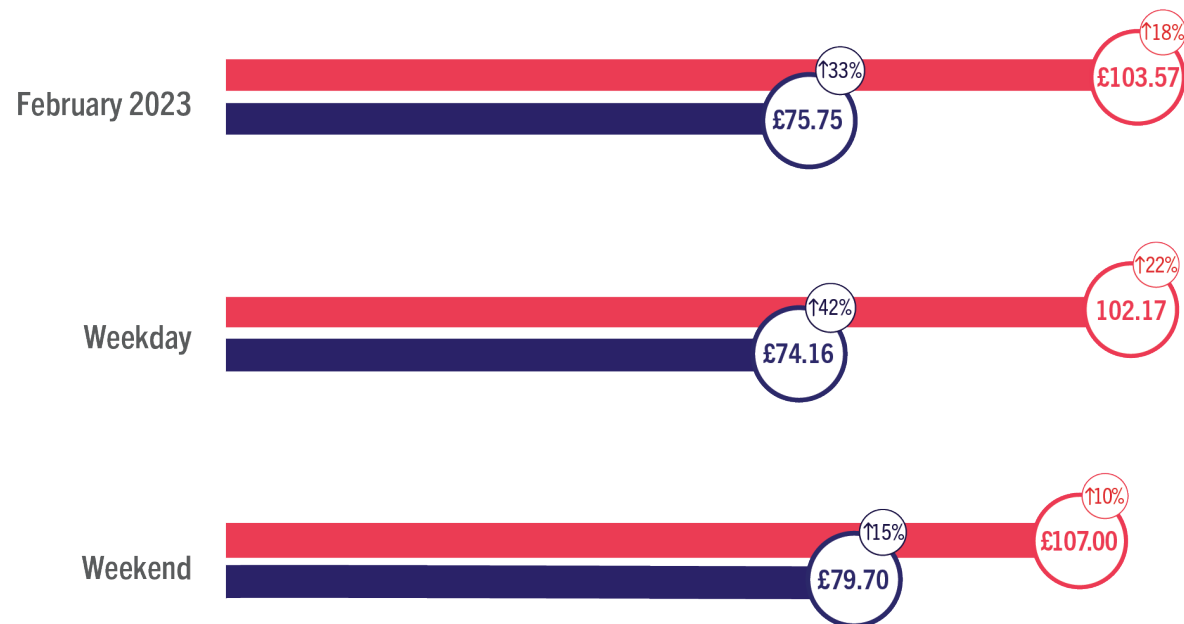


England Bedspace Occupancy by Month

England ADR and RevPAR

At a glance - February 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 – February

ADR

	2019	2021	2022	2023
February	£87.33	£47.40	£87.80	£103.57
Weekday	£89.60	£47.04	£83.47	£102.17
Weekend	£81.59	£48.90	£97.30	£107.00

RevPAR

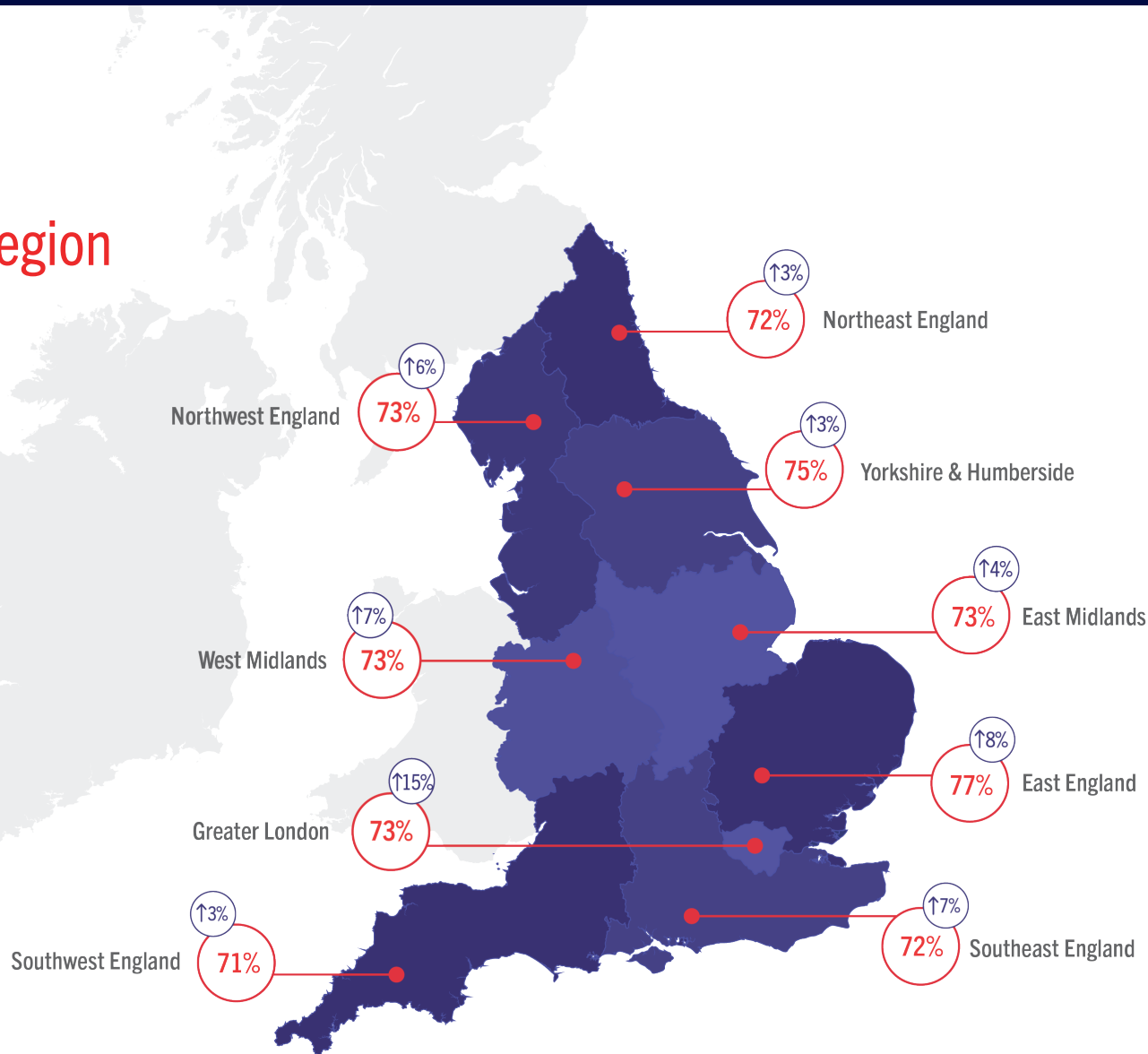
	2019	2021	2022	2023
February	£64.02	£13.76	£56.94	£75.75
Weekday	£65.90	£15.42	£52.06	£74.16
Weekend	£59.31	£9.63	£69.15	£79.70



Room Occupancy By Region

At a glance - February 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 - February

Room Occupancy

	2019	2021	2022	2023
East England	72%	38%	69%	77%
East Midlands	70%	33%	69%	73%
Greater London	78%	24%	58%	73%
Northeast England	68%	30%	69%	72%
Northwest England	74%	26%	67%	73%
Southeast England	70%	32%	64%	72%
Southwest England	71%	36%	69%	71%
West Midlands	72%	25%	67%	73%
Yorkshire & Humberside	71%	26%	71%	75%

Bedspace Occupancy

	2019	2021	2022	2023
East England	51%	27%	49%	54%
East Midlands	50%	23%	49%	51%
Greater London	56%	17%	42%	53%
Northeast England	48%	21%	49%	51%
Northwest England	52%	19%	48%	52%
Southeast England	50%	22%	45%	50%
Southwest England	50%	25%	48%	50%
West Midlands	48%	17%	45%	50%
Yorkshire & Humberside	51%	19%	51%	54%

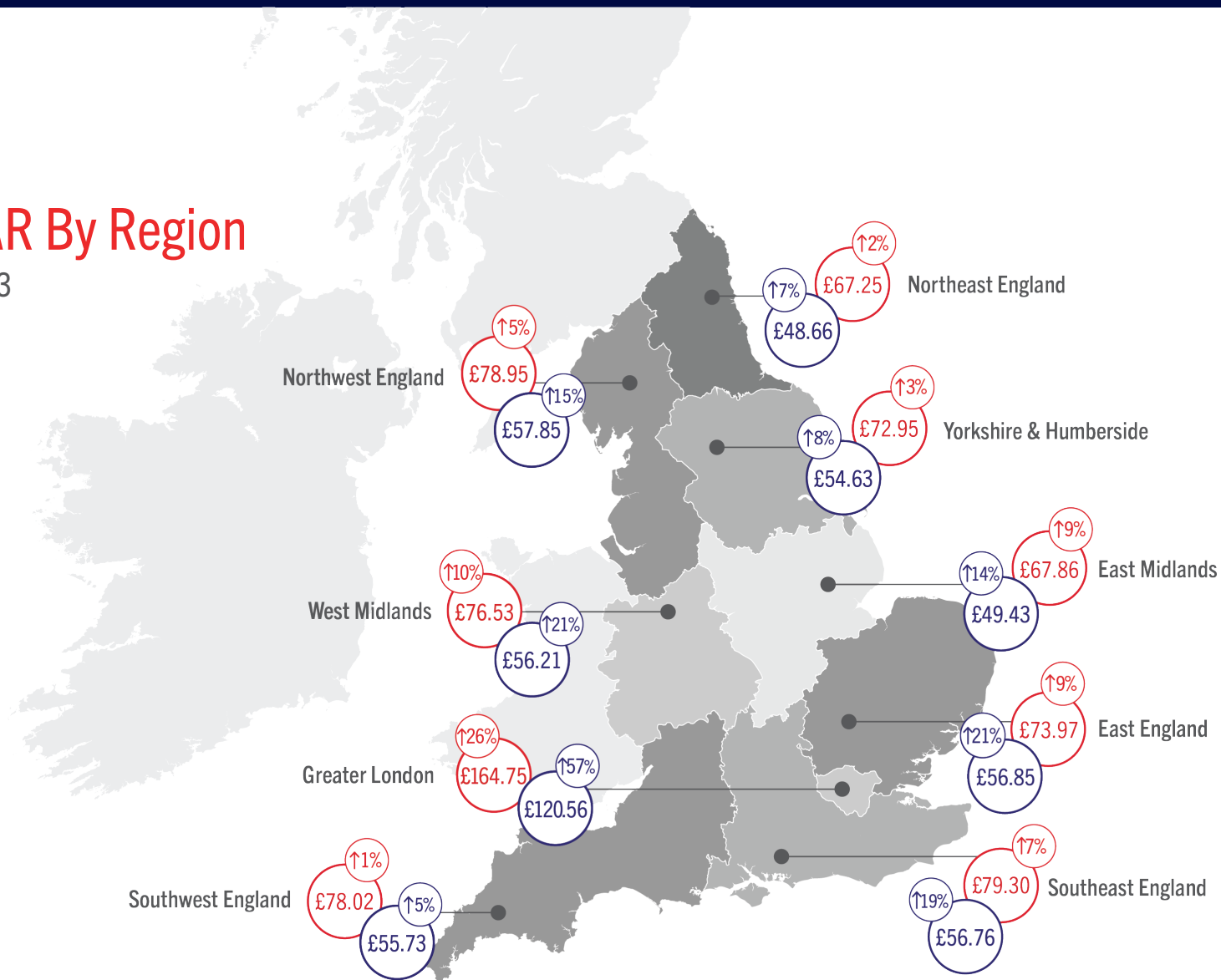


ADR and RevPAR By Region

At a glance - February 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 - February

ADR

	2019	2021	2022	2023
East England	£62.86	£43.98	£68.02	£73.97
East Midlands	£58.56	£44.00	£62.46	£67.86
Greater London	£132.91	£58.60	£130.97	£164.75
Northeast England	£57.29	£44.57	£65.67	£67.25
Northwest England	£67.35	£46.23	£74.90	£78.95
Southeast England	£68.76	£45.60	£73.87	£79.30
Southwest England	£65.80	£43.43	£76.91	£78.02
West Midlands	£66.85	£43.30	£69.56	£76.53
Yorkshire & Humberside	£59.15	£42.46	£70.58	£72.95

RevPAR

	2019	2021	2022	2023
East England	£45.02	£16.72	£47.17	£56.85
East Midlands	£41.16	£14.66	£43.29	£49.43
Greater London	£103.41	£13.96	£76.55	£120.56
Northeast England	£38.82	£13.49	£45.41	£48.66
Northwest England	£49.62	£12.04	£50.51	£57.85
Southeast England	£48.38	£14.57	£47.62	£56.76
Southwest England	£46.81	£15.64	£52.94	£55.73
West Midlands	£47.91	£10.83	£46.46	£56.21
Yorkshire & Humberside	£42.20	£11.17	£50.45	£54.63



Room Occupancy By Destination Type

At a glance - February 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 - February

Room Occupancy

	2019	2021	2022	2023
City / Large Town	74%	29%	65%	74%
Small Town	68%	31%	65%	70%
Countryside	69%	31%	63%	64%
Seaside	70%	35%	68%	69%

Bedspace Occupancy

	2019	2021	2022	2023
City / Large Town	52%	20%	45%	52%
Small Town	49%	22%	47%	51%
Countryside	47%	21%	43%	44%
Seaside	53%	27%	51%	52%



Room Occupancy By Number of Rooms

At a glance - February 2023



*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 - February

Room Occupancy

	2019	2021	2022	2023
1 to 25 Rooms	68%	37%	64%	67%
26 to 50 Rooms	70%	37%	67%	70%
51 to 100 Rooms	72%	42%	73%	76%
101+ Rooms	74%	24%	62%	73%

Bedspace Occupancy

	2019	2021	2022	2023
1 to 25 Rooms	50%	27%	46%	49%
26 to 50 Rooms	50%	27%	48%	51%
51 to 100 Rooms	53%	31%	53%	56%
101+ Rooms	52%	17%	44%	51%

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=3,527).

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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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