

England Occupancy Survey

July 2023 Results

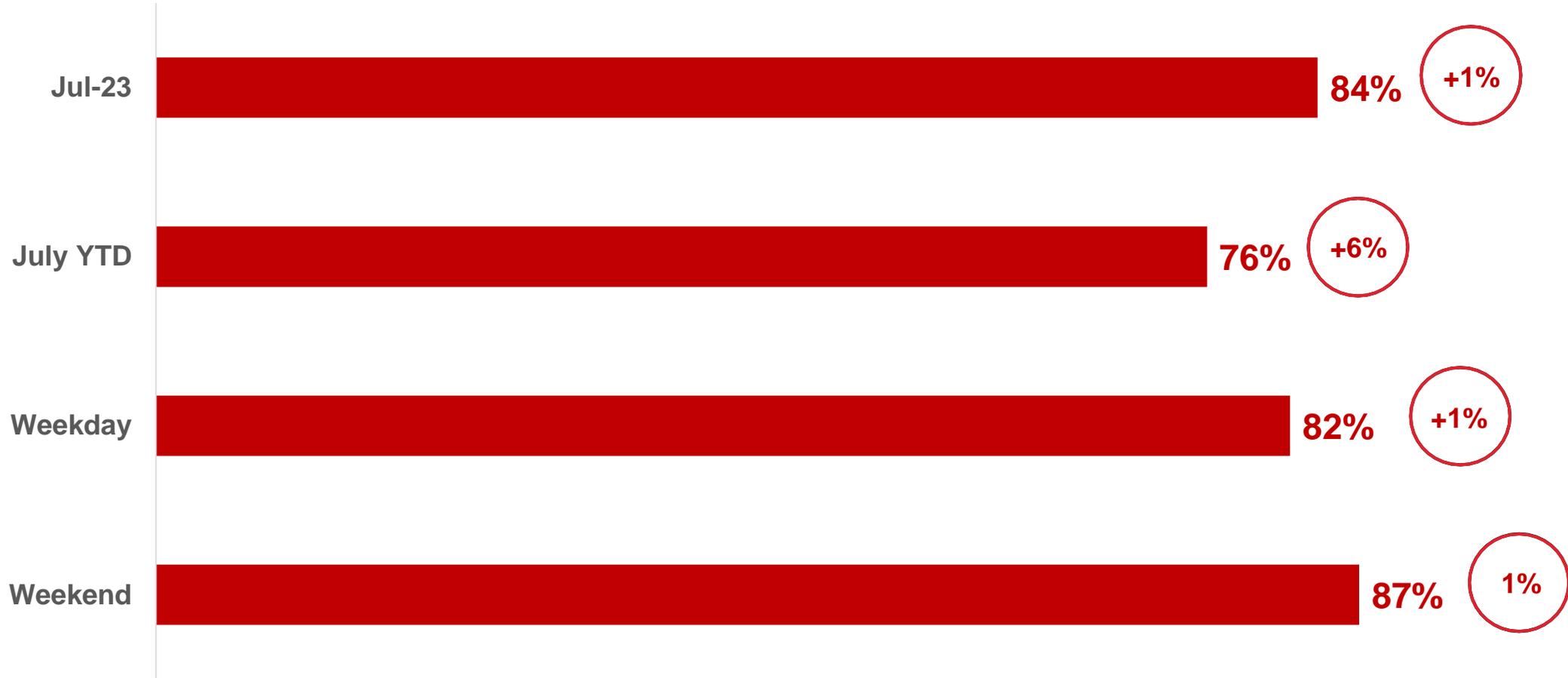
VisitEngland Research

Summary of Results

- When comparing July 2023 results with July 2022, **room occupancy** increased from 83% to 84%, however remains just below the July 2019 occupancy level which was 85%.
- **Room supply** increased 0.1% whilst **room demand** increased 1.1% compared to July 2022.
- **RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 7.4% to £117.02 in July 2023, when compared to the same month in 2022.
- Looking at hotel performance across **destination types**, occupancy in small towns increased the most, from 81% to 83%, followed by city / large towns (up 1% to 84%), countryside (down 4% to 78%), and finally seaside (down 5% to 81%).
- Assessing room occupancy by **establishment size**, the largest hotels (100+ rooms) increased their occupancy the most, up 2% to 84% in July 2023. Hotels with 51-100 rooms saw occupancy decrease by 1% to 84%, hotels with 26-50 rooms decreased by 3% to 81%. The smallest hotels, with 1-25 rooms, decreased in occupancy by 3% to 77% compared to July 2022.
- The regions which recorded growth compared to July 2022; Southeast England, which increased occupancy from 83% to 86%, and London, which increased occupancy from 84% to 86%.

England Room Occupancy

At a glance – July 2023



England Room Occupancy

Data Tables - July

Room Occupancy	2019	2021	2022	2023
July	85%	65%	83%	84%
July YTD	77%	42%	71%	76%
Weekday	84%	61%	82%	82%
Weekend	88%	72%	86%	87%

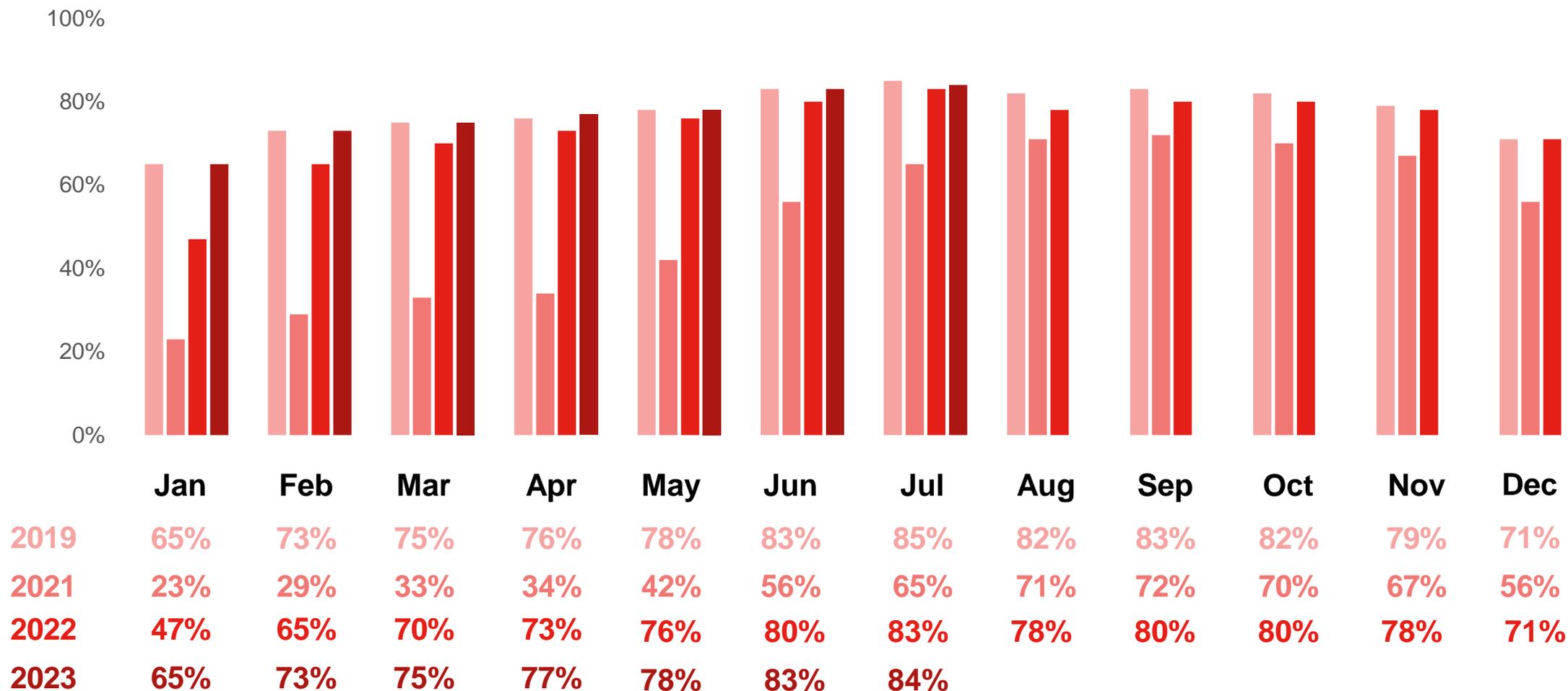
Room Supply and Room Demand Year-on-year relative % change	2019	2021	2022	2023
Room Supply	2.2%	15.0%	2.9%	0.1%
Room Demand	1.9%	154.8%	32.3%	1.1%

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



England Room Occupancy

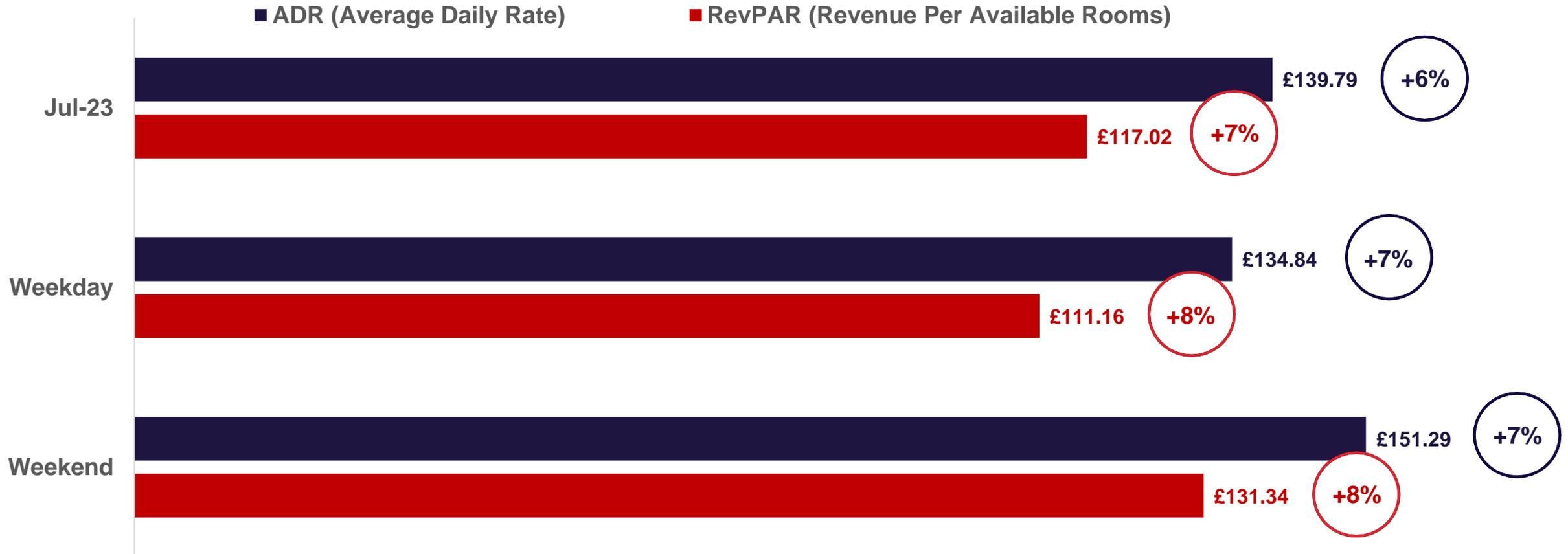
England Room Occupancy by Month



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



England ADR and RevPAR



England ADR and RevPAR

Data Tables - July

ADR	2019	2021	2022	2023
July	£107.86	£88.55	£131.35	£139.79
Weekday	£107.31	£82.18	£125.84	£134.84
Weekend	£109.35	£99.98	£141.13	£151.29

RevPAR	2019	2021	2022	2023
July	£91.87	£57.22	£108.92	£117.02
Weekday	£90.41	£50.35	£102.35	£111.16
Weekend	£96.06	£71.64	£121.67	£131.34

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

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

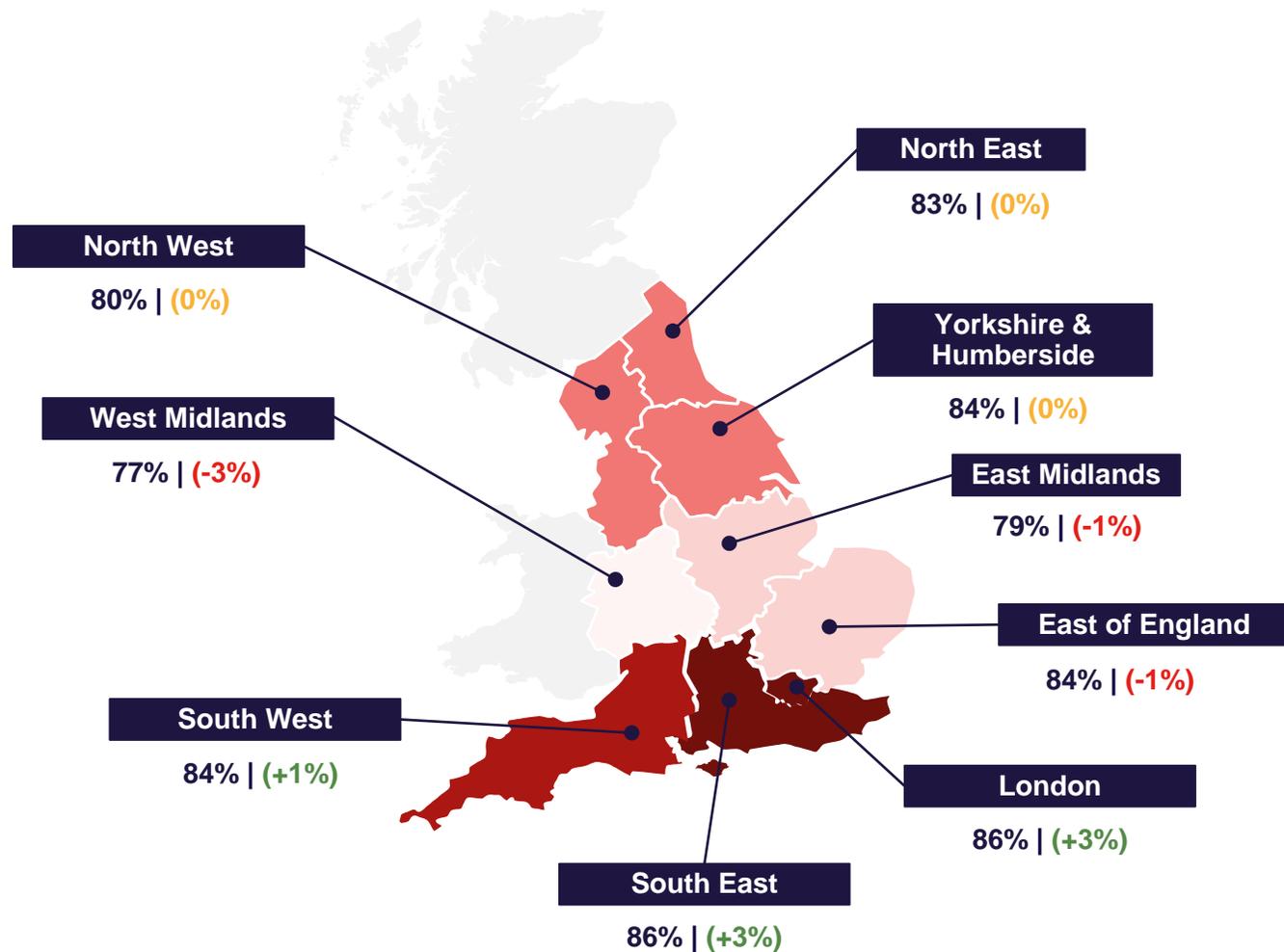


Room Occupancy by Region

At a glance – July 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 - July

Room Occupancy	2019	2021	2022	2023
East England	83%	74%	85%	84%
East Midlands	79%	70%	80%	79%
Greater London	90%	49%	84%	86%
Northeast England	82%	75%	83%	83%
Northwest England	83%	68%	81%	80%
Southeast England	86%	70%	83%	86%
Southwest England	87%	80%	83%	84%
West Midlands	77%	65%	80%	77%
Yorkshire & Humberside	82%	72%	84%	84%

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

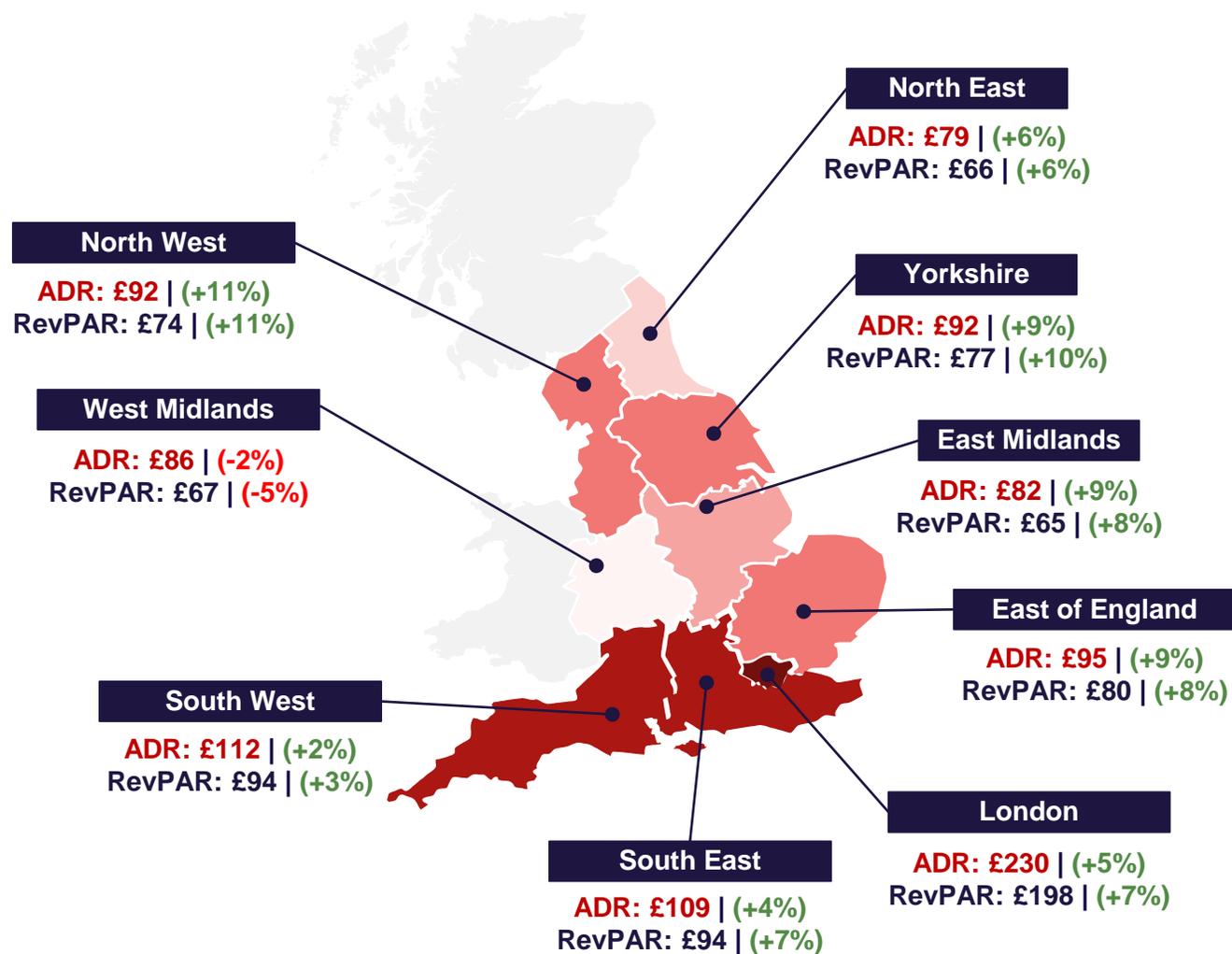


ADR and RevPAR by Region

At a glance – July 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

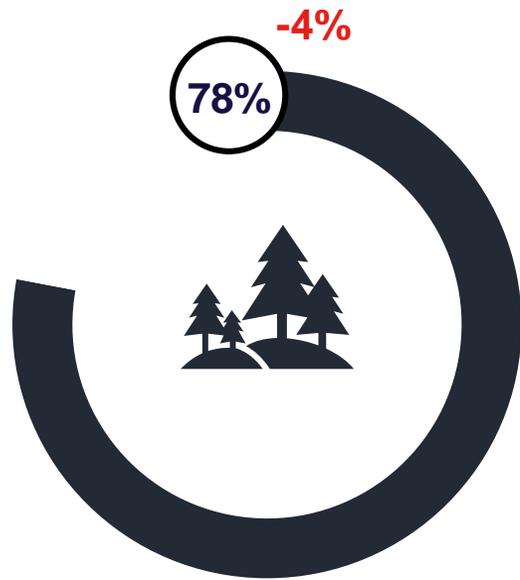
Data Tables - July

ADR	2019	2021	2022	2023	RevPAR	2019	2021	2022	2023
East England	£73.63	£76.32	£87.33	£94.88	East England	£61.31	£56.19	£73.93	£79.90
East Midlands	£66.17	£66.07	£75.19	£82.13	East Midlands	£51.96	£46.37	£59.99	£64.89
Greater London	£174.41	£105.40	£219.17	£230.21	Greater London	£157.30	£51.82	£184.72	£197.95
Northeast England	£63.26	£68.18	£74.61	£79.02	Northeast England	£52.14	£50.86	£62.00	£65.52
Northwest England	£73.39	£77.29	£82.58	£91.06	Northwest England	£60.71	£52.90	£66.64	£73.67
Southeast England	£83.27	£90.48	£104.86	£109.10	Southeast England	£71.45	£63.18	£87.40	£93.76
Southwest England	£89.13	£112.53	£109.45	£112.16	Southwest England	£77.58	£89.91	£91.11	£93.95
West Midlands	£65.91	£69.56	£87.83	£86.27	West Midlands	£50.50	£45.29	£70.08	£66.78
Yorkshire & Humberside	£68.50	£77.63	£84.27	£92.13	Yorkshire & Humberside	£56.42	£55.69	£70.48	£77.24

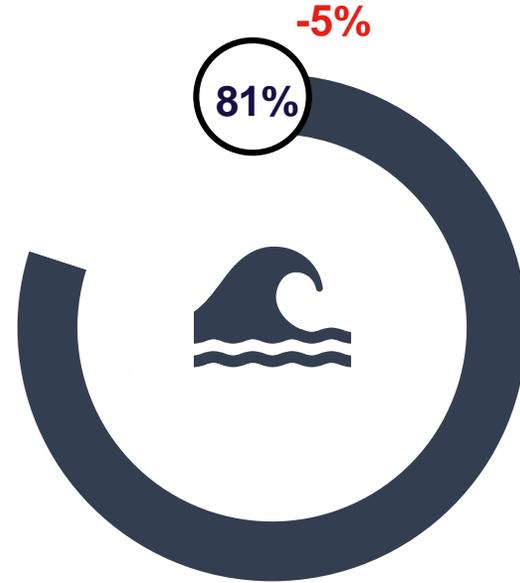
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Room Occupancy by Destination Type

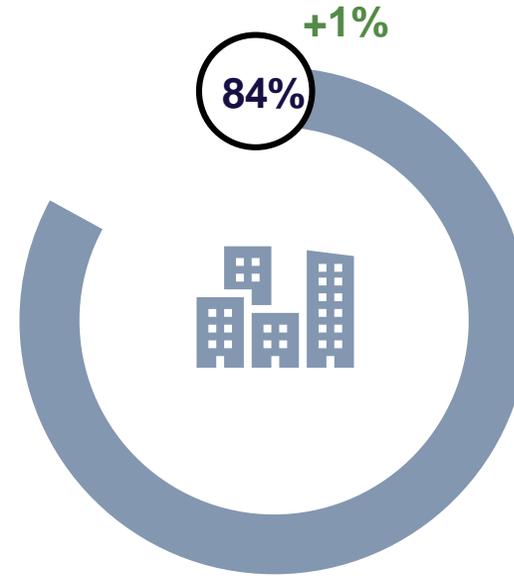
At a glance – July 2023



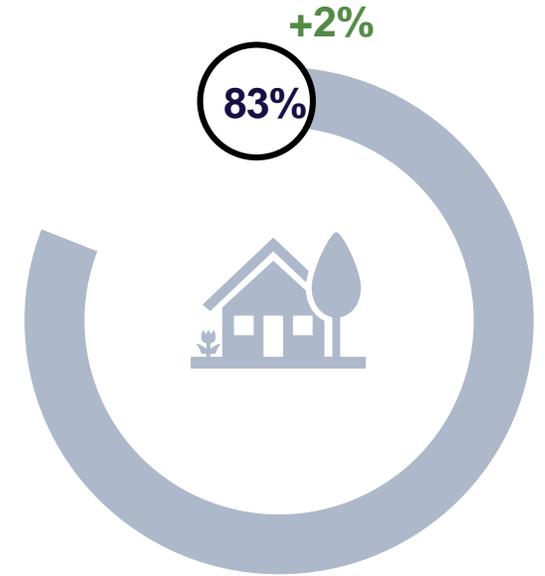
Countryside



Seaside



City / Large Town



Small Town

Room Occupancy by Destination Type

Data Tables - July

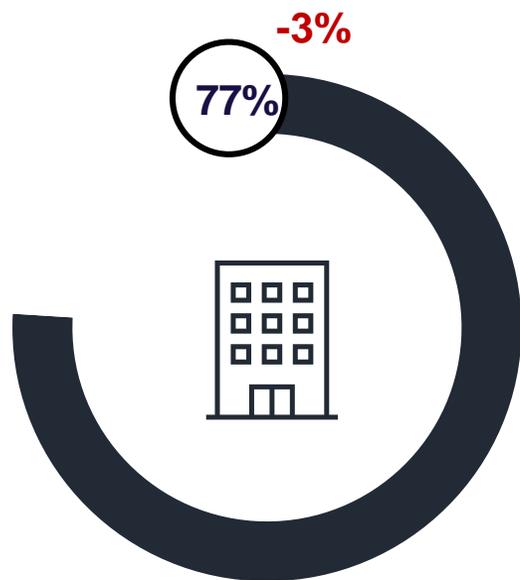
Room Occupancy	2019	2021	2022	2023
City / Large Town	85%	63%	83%	84%
Small Town	83%	72%	81%	83%
Countryside	84%	78%	81%	78%
Seaside	87%	84%	85%	81%

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



Room Occupancy by Number of Rooms

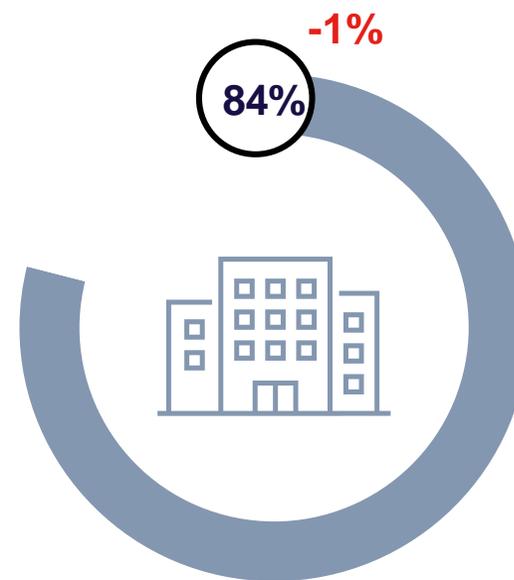
At a glance – July 2023



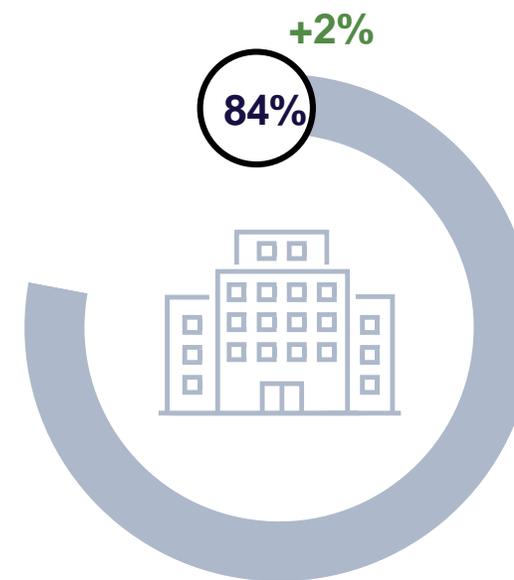
1-25 Rooms



26-50 Rooms



51-100 Rooms



100+ Rooms

Room Occupancy by Number of Rooms

Data Tables - July

Room Occupancy	2019	2021	2022	2023
1 to 25 Rooms	81%	71%	80%	77%
26 to 50 Rooms	83%	76%	83%	81%
51 to 100 Rooms	84%	77%	85%	84%
101+ Rooms	86%	60%	82%	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=3,541)