

VisitEngland™



# England Occupancy Survey

March 2022 Results

Created by





## Summary of Results

**Room occupancy** in March 2022 increased by 38% to 71% whilst bedspace occupancy in March 2022 increased by 27% to 49% when compared to March 2021. In March 2022, room supply increased by 26.9% when compared to March 2021. Meanwhile, room demand increased by 173.4% when compared to the same month last year.

**RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 351% to £71.07 in March 2022 when compared to the same month last year.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most by 39% to 71%, followed by Small Town and Seaside hotel occupancy which both increased by 30% to 69% and 70%, respectively. The smallest change from last year was recorded for Countryside hotels as occupancy increased by 22% to 66%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most by 42% to 69% followed by hotels with 1 to 25 rooms which increased occupancy by 31% to 69%, and hotels with 51 to 100 rooms which increased occupancy by 29% to 75%. The smallest change from last year was recorded for hotels with 26 to 50 rooms as occupancy increased by 25% to 71%.

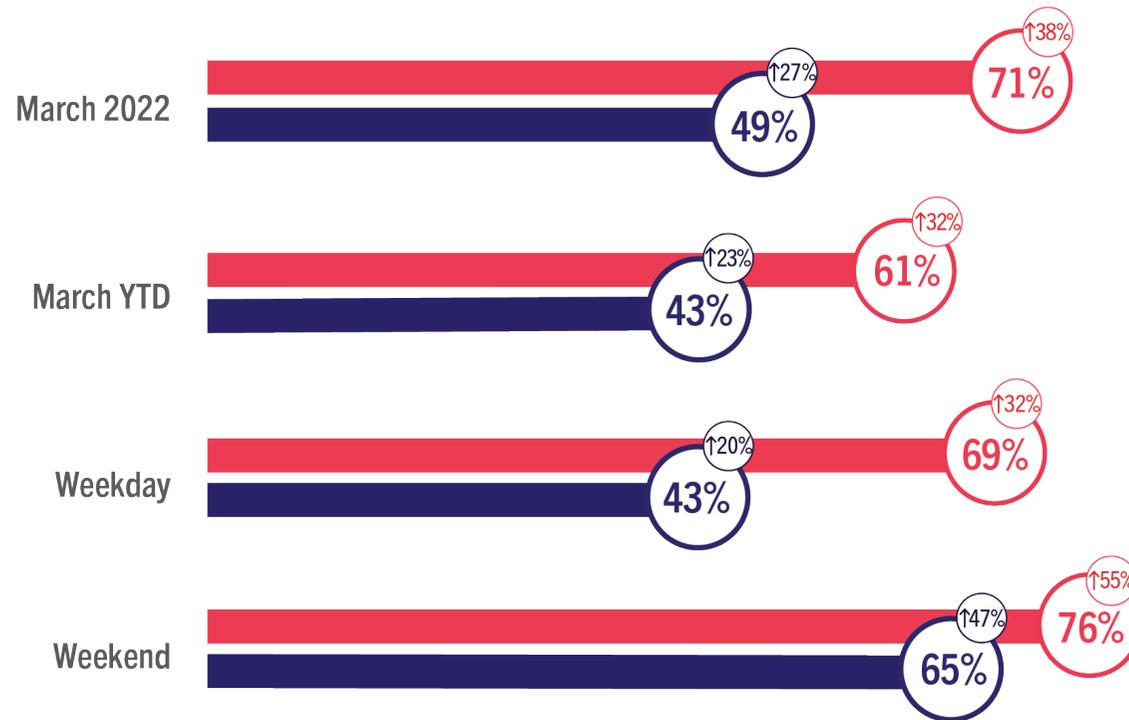
Evaluating trends across the **9 regions** of England, all regions achieved increased room occupancy compared to the same month last year. The three regions that recorded the greatest change in room occupancy from last year were Greater London which increased occupancy by 45% to 71%, followed by West Midlands and Yorkshire & Humberside which both increased occupancy by 43% to 72% and 74%, respectively.

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 current data during the Covid-19 pandemic.

## England Room and Bedspace Occupancy

At a glance - March 2022

● 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

	2020	2021	2022
March	37%	33%	71%
March YTD	57%	29%	61%
Weekday	37%	37%	69%
Weekend	37%	21%	76%

### Bedspace Occupancy

	2020	2021	2022
March	25%	22%	49%
March YTD	40%	19%	43%
Weekday	23%	23%	43%
Weekend	31%	18%	65%

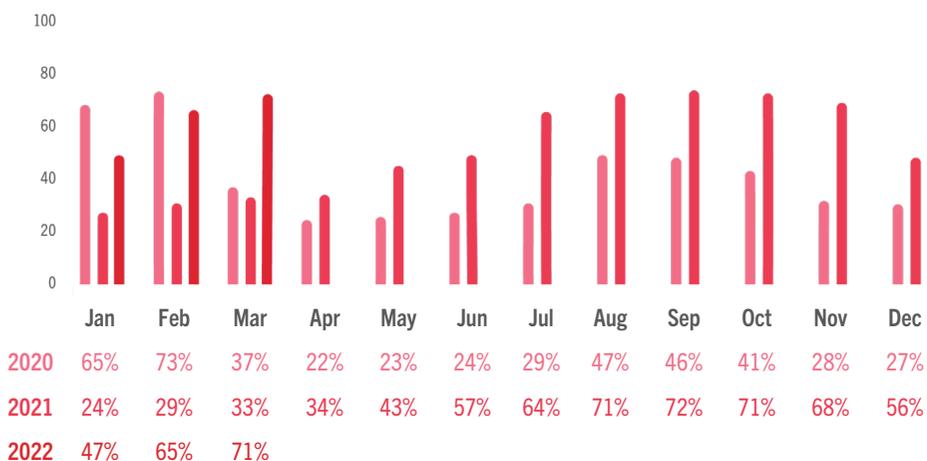
### Room supply and room demand

Year-on-year relative percentage change	2020	2021	2022
Room Supply	1.5%	-21.9%	26.9%
Room Demand	-50.1%	-30.3%	173.4%

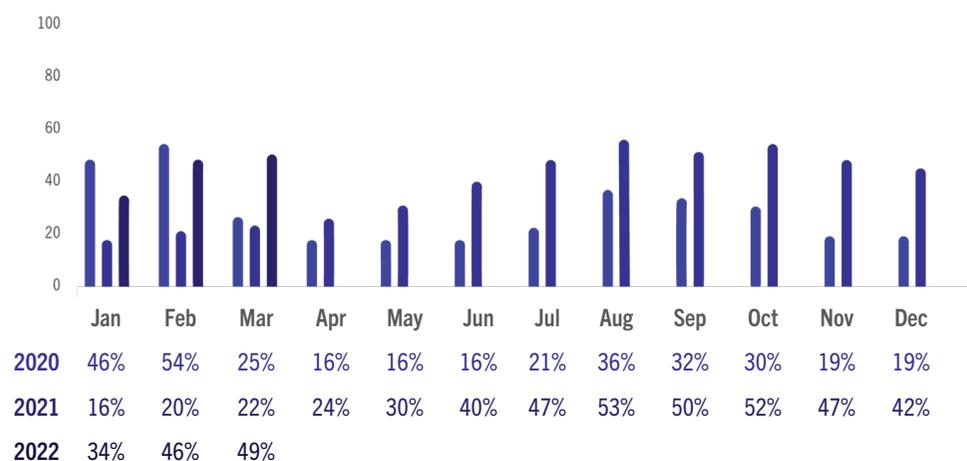


## England Room and Bedspace Occupancy

### Data Tables



England Room Occupancy by Month

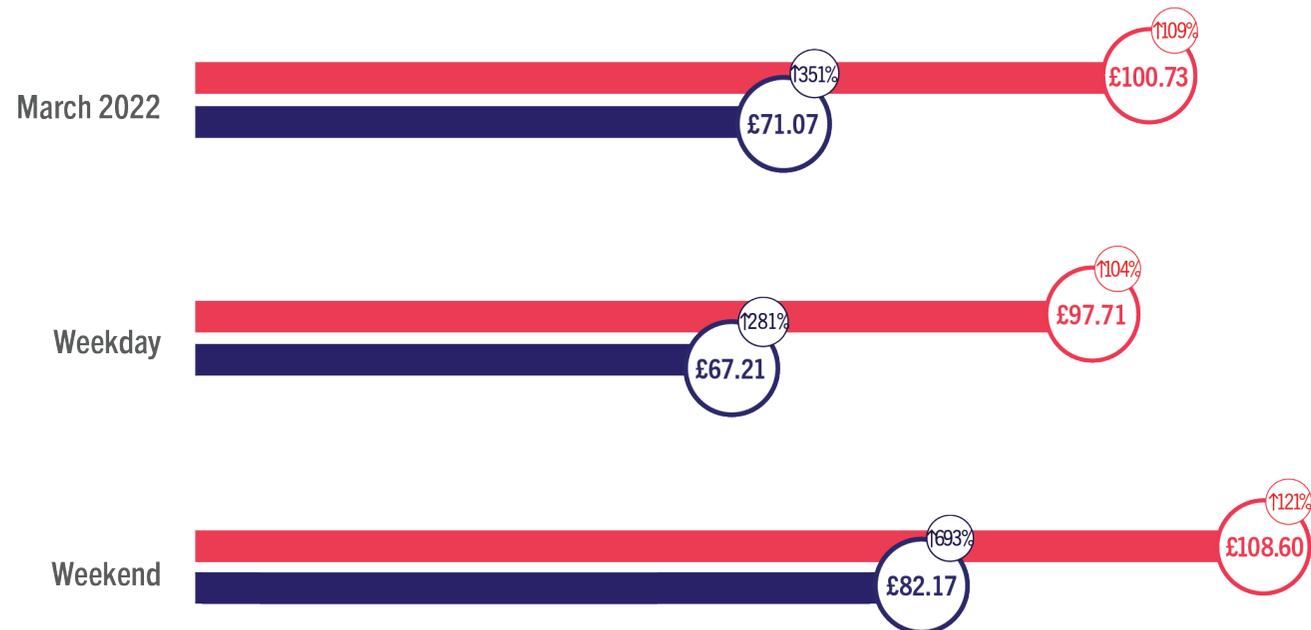


England Bedspace Occupancy by Month

## England ADR and RevPAR

At a glance - March 2022

● 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

	2020	2021	2022
<b>March</b>	£81.54	£48.17	£100.73
<b>Weekday</b>	£81.46	£47.97	£97.71
<b>Weekend</b>	£81.75	£49.16	£108.60

### RevPAR

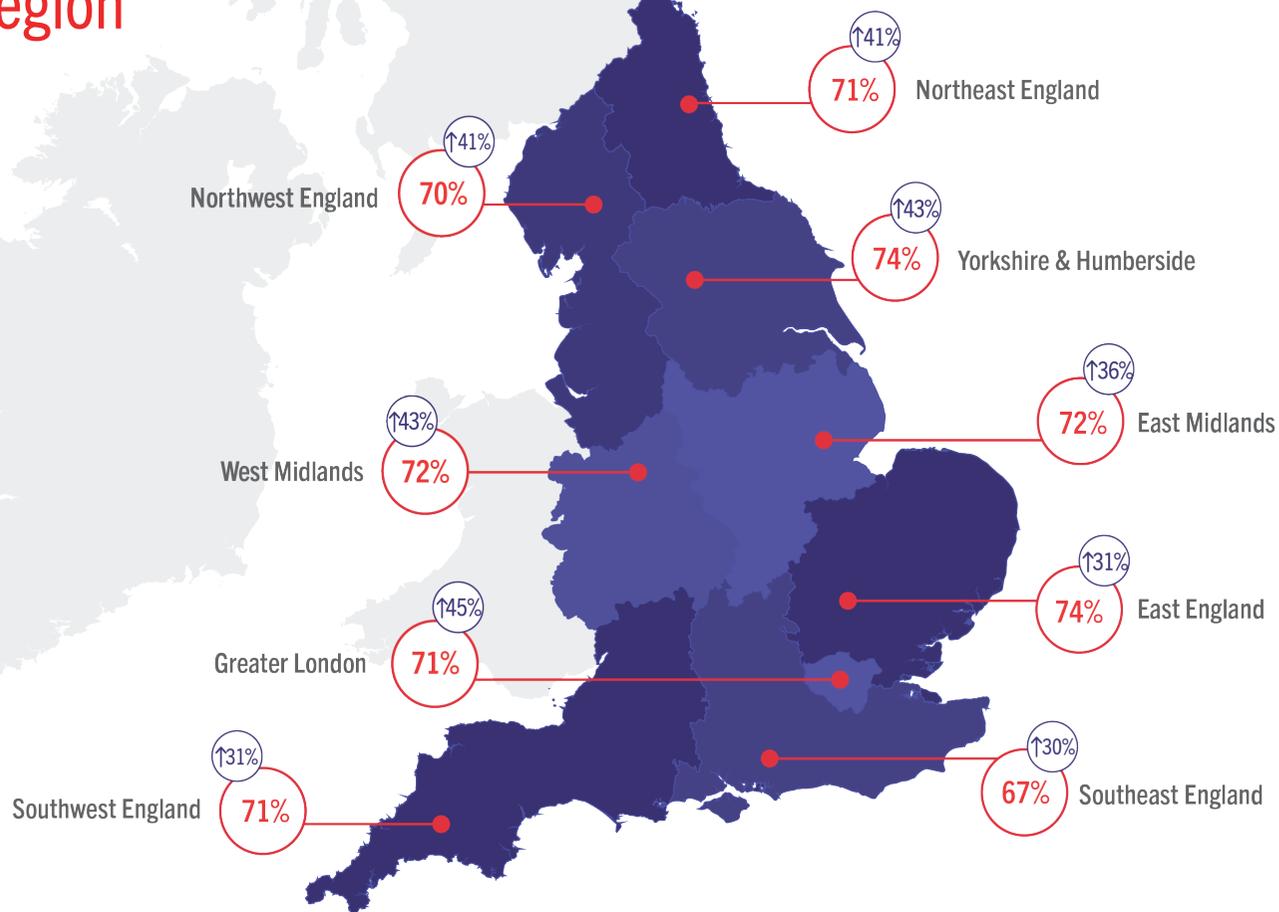
	2020	2021	2022
<b>March</b>	£29.95	£15.77	£71.07
<b>Weekday</b>	£29.95	£17.66	£67.21
<b>Weekend</b>	£29.94	£10.36	£82.17



## Room Occupancy By Region

At a glance - March 2022

\*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

	2020	2021	2022
East England	40%	43%	74%
East Midlands	39%	36%	72%
Greater London	33%	26%	71%
Northeast England	37%	30%	71%
Northwest England	39%	28%	70%
Southeast England	38%	37%	67%
Southwest England	39%	40%	71%
West Midlands	38%	29%	72%
Yorkshire & Humberside	39%	31%	74%

### Bedspace Occupancy

	2020	2021	2022
East England	27%	30%	51%
East Midlands	27%	24%	49%
Greater London	23%	18%	50%
Northeast England	25%	21%	49%
Northwest England	26%	19%	48%
Southeast England	26%	25%	46%
Southwest England	27%	27%	48%
West Midlands	25%	19%	47%
Yorkshire & Humberside	27%	21%	51%

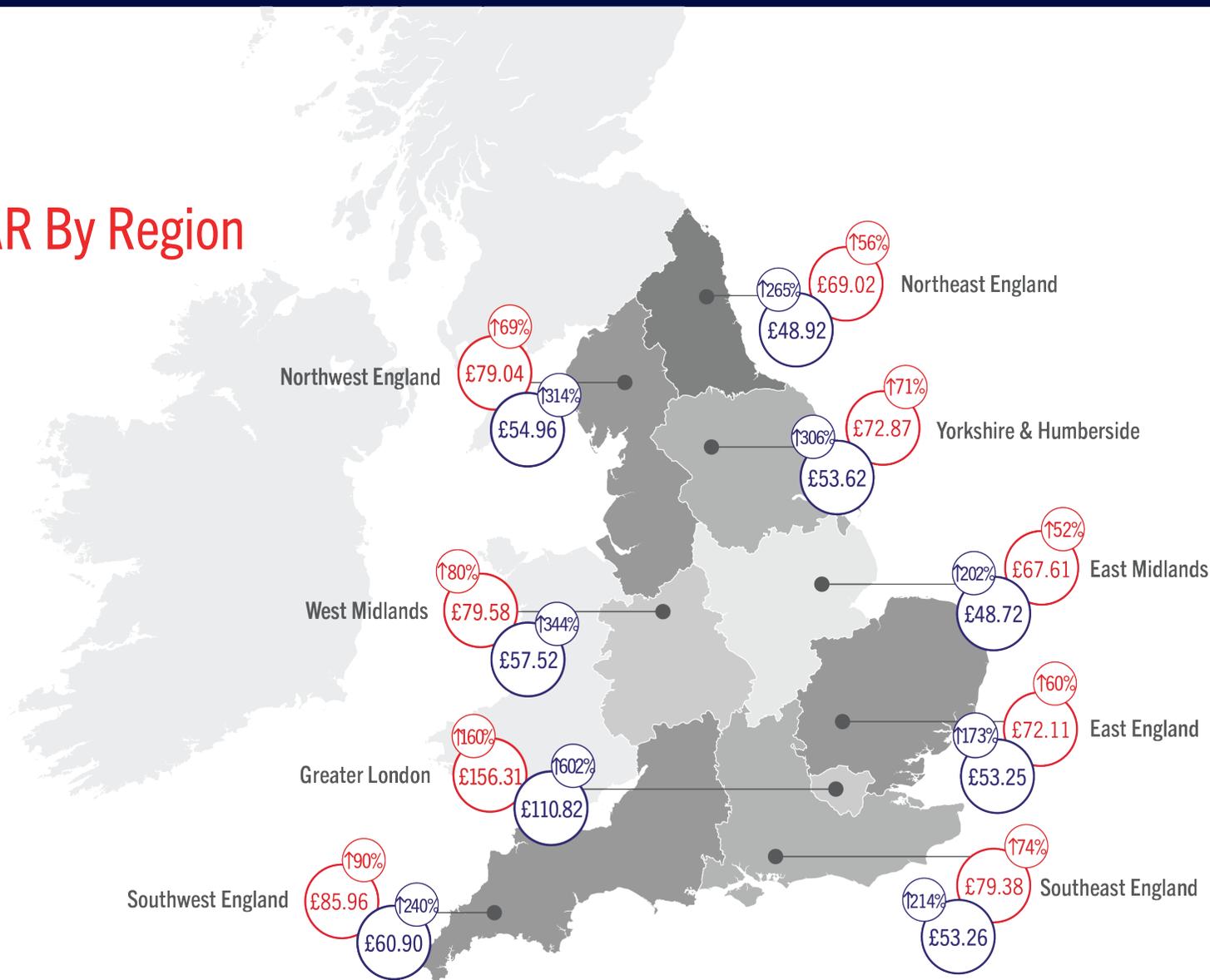


## ADR and RevPAR By Region

At a glance - March 2022

\*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

<b>ADR</b>	2020	2021	2022
East England	£61.60	£45.05	£72.11
East Midlands	£58.51	£44.58	£67.61
Greater London	£124.45	£60.21	£156.31
Northeast England	£56.93	£44.28	£69.02
Northwest England	£67.71	£46.90	£79.04
Southeast England	£67.50	£45.52	£79.38
Southwest England	£71.39	£45.30	£85.96
West Midlands	£70.19	£44.27	£79.58
Yorkshire & Humberside	£58.54	£42.72	£72.87

<b>RevPAR</b>	2020	2021	2022
East England	£24.46	£19.48	£53.25
East Midlands	£23.04	£16.14	£48.72
Greater London	£40.78	£15.78	£110.82
Northeast England	£20.95	£13.42	£48.92
Northwest England	£26.11	£13.28	£54.96
Southeast England	£25.52	£16.97	£53.26
Southwest England	£28.04	£17.92	£60.90
West Midlands	£26.37	£12.96	£57.52
Yorkshire & Humberside	£22.63	£13.20	£53.62



## Room Occupancy By Destination Type

At a glance - March 2022



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 Location Type

Data Tables - March

### Room Occupancy

	2020	2021	2022
City / Large Town	36%	32%	71%
Small Town	38%	39%	69%
Countryside	35%	43%	66%
Seaside	39%	39%	70%

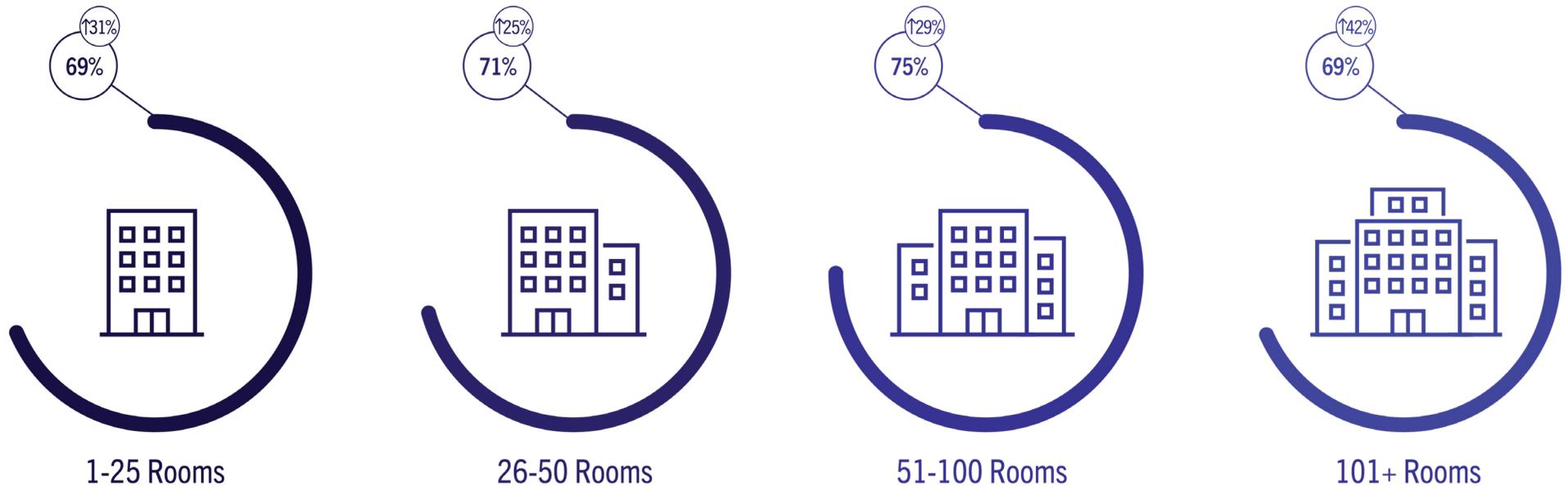
### Bedspace Occupancy

	2020	2021	2022
City / Large Town	25%	21%	48%
Small Town	27%	27%	49%
Countryside	23%	29%	44%
Seaside	28%	28%	50%



## Room Occupancy By Number of Rooms

At a glance - March 2022



\*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

	2020	2021	2022
1 to 25 Rooms	40%	38%	69%
26 to 50 Rooms	40%	45%	71%
51 to 100 Rooms	41%	46%	75%
101+ Rooms	35%	27%	69%

### Bedspace Occupancy

	2020	2021	2022
1 to 25 Rooms	28%	27%	49%
26 to 50 Rooms	28%	32%	50%
51 to 100 Rooms	29%	33%	54%
101+ Rooms	24%	18%	47%



## 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=3,460).

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