

VisitEngland™



# England Occupancy Survey

July 2022 Results

Created by





## Summary of Results

When comparing July 2022 results with July 2021, **room occupancy** in July 2022 increased from 65% to 83%, whilst bedspace occupancy increased from 47% to 60%. In July 2022, room supply increased by 2.9% (in relative terms), when compared with July 2021. Meanwhile, room demand increased by 32.3% (in relative terms), when compared with July 2021.

**RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 90% to £108.86 in July 2022, when compared with the same month last year.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most from 63% to 83%, followed by Small Town hotel occupancy, which increased from 72% to 81%, and Seaside hotel occupancy, which increased from 84% to 86%. The smallest change from last year was recorded for Countryside hotels as occupancy increased from 78% to 79%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most from 60% to 83%, followed by hotels with 1-25 rooms, which increased occupancy from 71% to 81%, and hotels with 51-100 rooms which increased occupancy from 77% to 85%. The smallest change from last year was recorded for hotels with 26-50 rooms as occupancy increased from 76% to 83%.

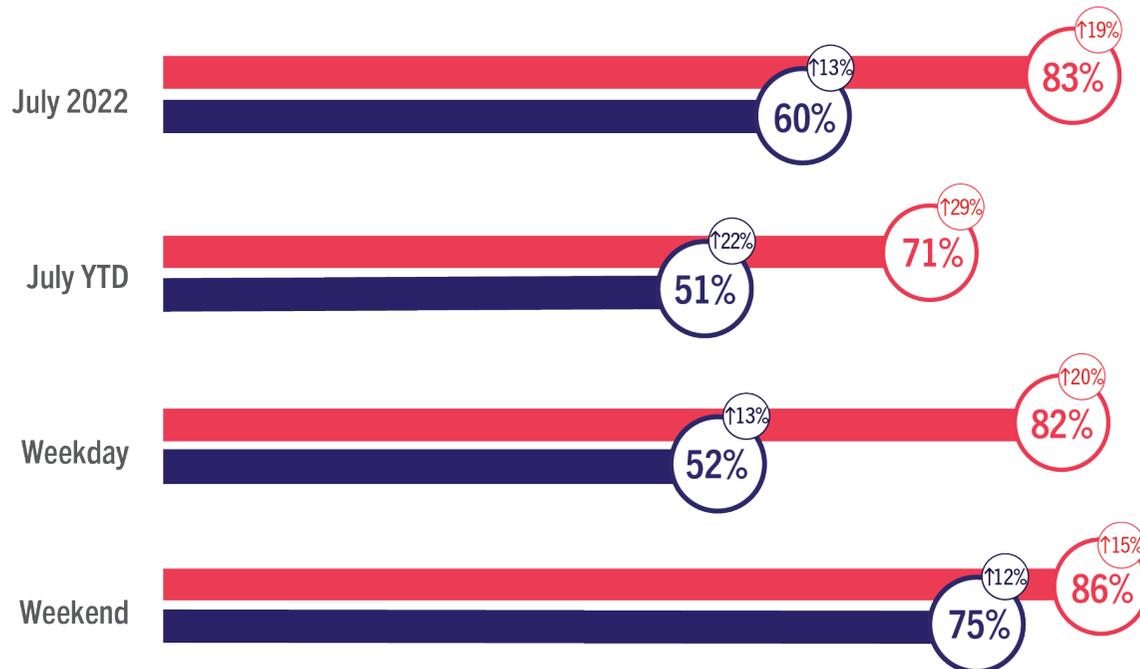
Evaluating trends across the **9 regions** of England, all regions achieved increased room occupancy compared with the same month last year. The three regions that recorded the greatest change in room occupancy from last year were Greater London, which increased occupancy from 49% to 85%, followed by West Midlands, which increased occupancy from 65% to 80%, and Southeast England, which increased occupancy from 70% to 83%.

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 - July 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 - July

### Room Occupancy

	2019	2020	2021	2022
<b>July</b>	85%	29%	65%	83%
<b>July YTD</b>	77%	43%	42%	71%
<b>Weekday</b>	84%	29%	61%	82%
<b>Weekend</b>	88%	30%	72%	86%

### Bedspace Occupancy

	2019	2020	2021	2022
<b>July</b>	60%	21%	47%	60%
<b>July YTD</b>	54%	30%	29%	51%
<b>Weekday</b>	54%	19%	39%	52%
<b>Weekend</b>	76%	26%	63%	75%

### Room supply and room demand

Year-on-year relative percentage change

	2019	2020	2021	2022
<b>Room Supply</b>	2.2%	-14.3%	15.0%	2.9%
<b>Room Demand</b>	1.9%	-70.7%	154.8%	32.3%

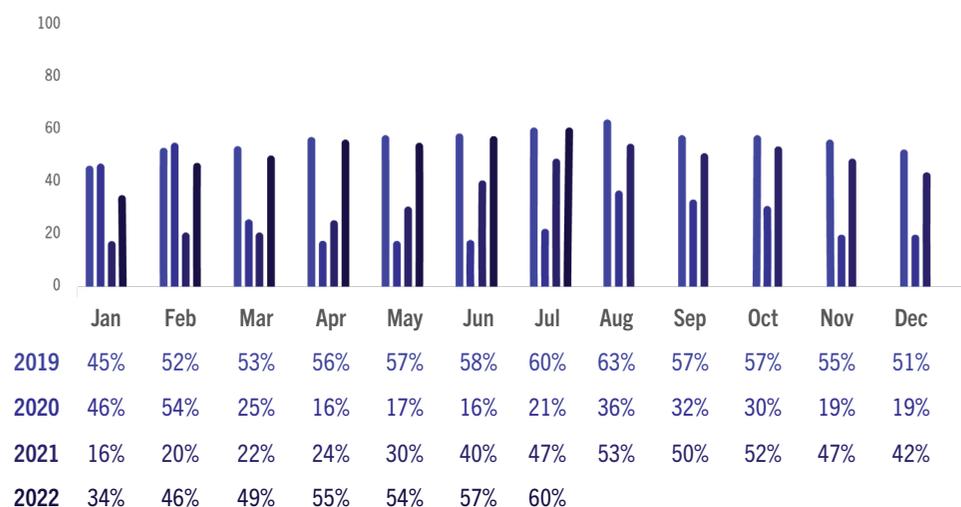


## England Room and Bedspace Occupancy

### Data Tables



England Room Occupancy by Month

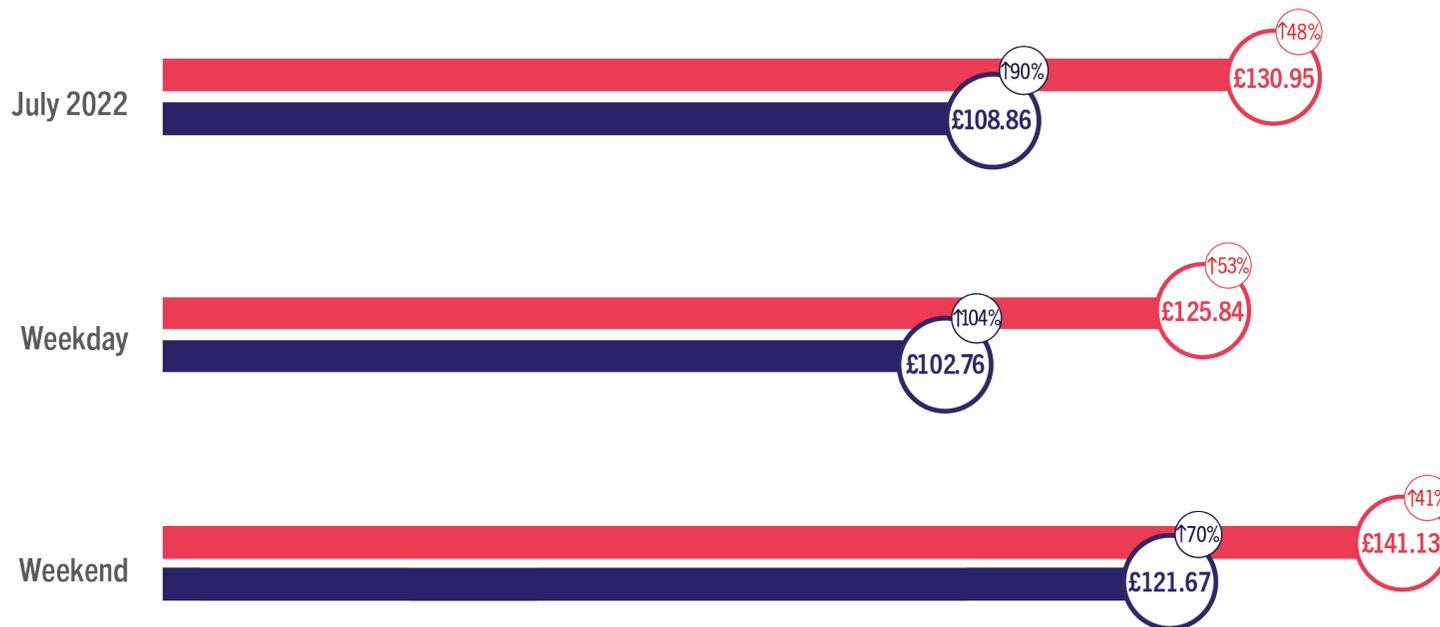


England Bedspace Occupancy by Month

## England ADR and RevPAR

At a glance - July 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 – July

### ADR

	2019	2020	2021	2022
<b>July</b>	£107.86	£67.27	£88.55	£130.95
<b>Weekday</b>	£107.31	£65.24	£82.18	£125.84
<b>Weekend</b>	£109.35	£71.98	£99.98	£141.13

### RevPAR

	2019	2020	2021	2022
<b>July</b>	£91.87	£19.59	£57.22	£108.86
<b>Weekday</b>	£90.41	£18.72	£50.35	£102.76
<b>Weekend</b>	£96.06	£21.69	£71.64	£121.67



## Room Occupancy By Region

At a glance - July 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 - July

### Room Occupancy

	2019	2020	2021	2022
East England	83%	36%	74%	85%
East Midlands	79%	28%	70%	80%
Greater London	90%	20%	49%	85%
Northeast England	82%	31%	75%	83%
Northwest England	83%	30%	68%	81%
Southeast England	86%	30%	70%	83%
Southwest England	87%	39%	80%	83%
West Midlands	77%	28%	65%	80%
Yorkshire & Humberside	82%	32%	72%	84%

### Bedspace Occupancy

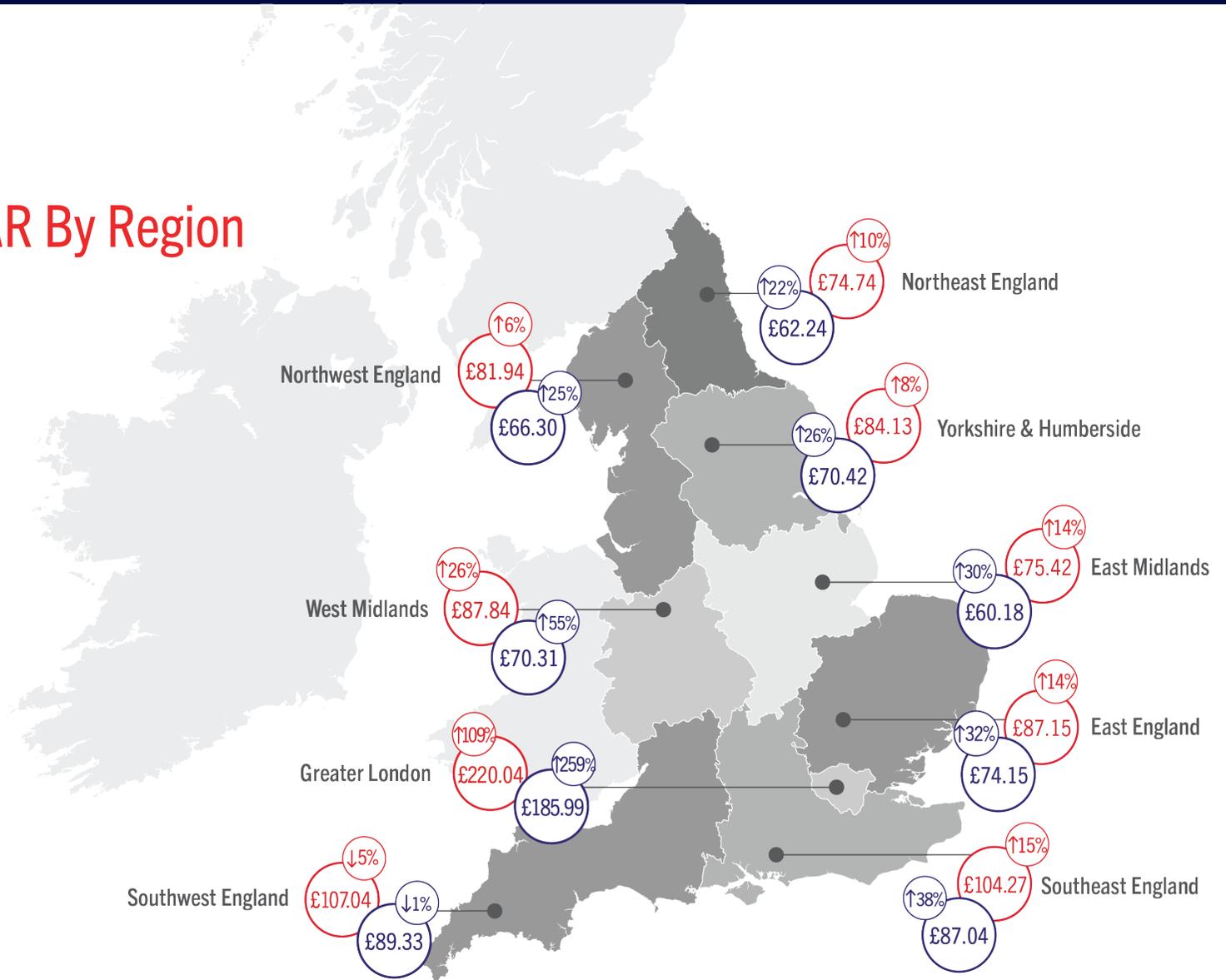
	2019	2020	2021	2022
East England	59%	26%	53%	61%
East Midlands	55%	20%	50%	57%
Greater London	65%	15%	36%	62%
Northeast England	58%	22%	53%	59%
Northwest England	58%	22%	49%	58%
Southeast England	60%	21%	50%	60%
Southwest England	60%	27%	56%	59%
West Midlands	51%	19%	45%	55%
Yorkshire & Humberside	58%	23%	52%	61%

## ADR and RevPAR By Region

At a glance - July 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 - July

### ADR

	2019	2020	2021	2022
East England	£73.63	£57.55	£76.32	£87.15
East Midlands	£66.17	£54.70	£66.07	£75.42
Greater London	£174.41	£83.77	£105.40	£220.04
Northeast England	£63.26	£57.30	£68.18	£74.74
Northwest England	£73.39	£61.14	£77.29	£81.94
Southeast England	£83.27	£69.78	£90.48	£104.27
Southwest England	£89.13	£78.55	£112.53	£107.04
West Midlands	£65.91	£54.10	£69.56	£87.84
Yorkshire & Humberside	£68.50	£55.78	£77.63	£84.13

### RevPAR

	2019	2020	2021	2022
East England	£61.31	£20.97	£56.19	£74.15
East Midlands	£51.96	£15.38	£46.37	£60.18
Greater London	£157.30	£17.10	£51.82	£185.99
Northeast England	£52.14	£17.51	£50.86	£62.24
Northwest England	£60.71	£18.38	£52.90	£66.30
Southeast England	£71.45	£21.16	£63.18	£87.04
Southwest England	£77.58	£30.71	£89.91	£89.33
West Midlands	£50.50	£14.95	£45.29	£70.31
Yorkshire & Humberside	£56.42	£17.74	£55.69	£70.42



## Room Occupancy By Destination Type

At a glance - July 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 - July

### Room Occupancy

	2019	2020	2021	2022
City / Large Town	85%	27%	63%	83%
Small Town	83%	30%	72%	81%
Countryside	84%	41%	78%	79%
Seaside	87%	49%	84%	86%

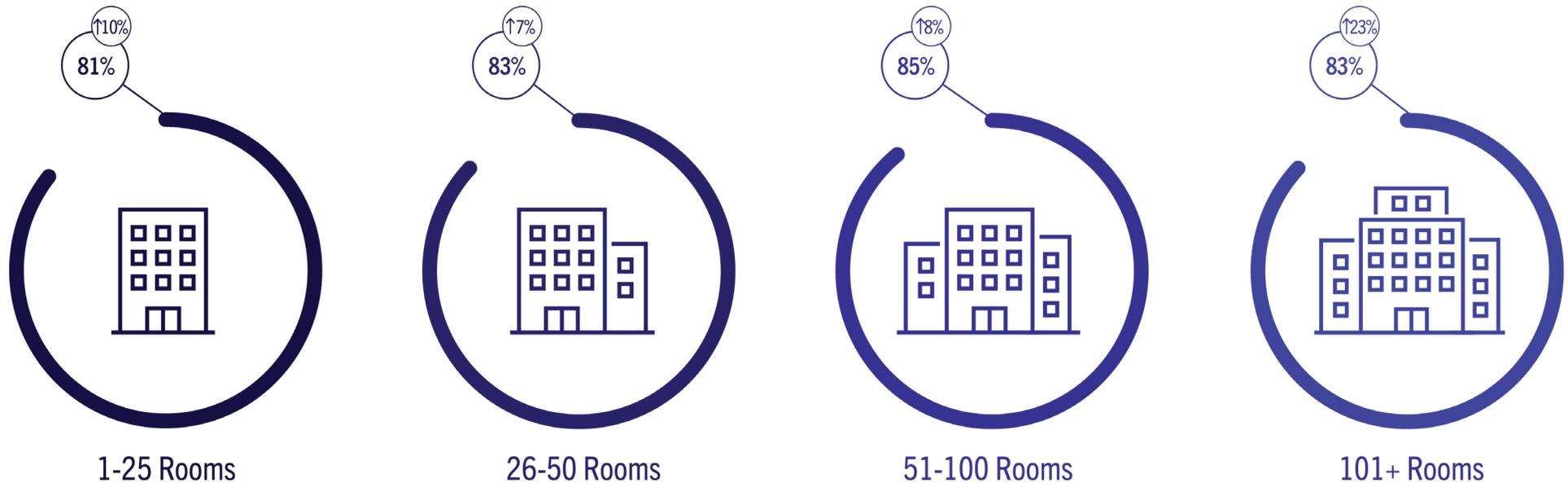
### Bedspace Occupancy

	2019	2020	2021	2022
City / Large Town	59%	19%	44%	59%
Small Town	60%	22%	52%	60%
Countryside	57%	29%	54%	55%
Seaside	65%	37%	64%	65%



## Room Occupancy By Number of Rooms

At a glance - July 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 - July

### Room Occupancy

	2019	2020	2021	2022
1 to 25 Rooms	81%	44%	71%	81%
26 to 50 Rooms	83%	39%	76%	83%
51 to 100 Rooms	84%	36%	77%	85%
101+ Rooms	86%	25%	60%	83%

### Bedspace Occupancy

	2019	2020	2021	2022
1 to 25 Rooms	59%	32%	52%	60%
26 to 50 Rooms	59%	28%	55%	60%
51 to 100 Rooms	61%	27%	57%	63%
101+ Rooms	60%	18%	42%	59%



## 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=3,568).

# 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](mailto:hotelinfo@str.com).

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