

VisitEngland™



England Occupancy Survey

September 2022 Results

Created by





Summary of Results

When comparing September 2022 results with September 2021, **room occupancy** in September 2022 increased from 72% to 80%, whilst **bedspace occupancy** increased from 50% to 56%. In September 2022, **room supply** increased by 1.7% (in relative terms) and **room demand** increased by 13.3% (in relative terms), when compared with September 2021.

RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 35% to £100.13 in September 2022, when compared with the same month last year.

Evaluating trends across the **9 regions** of England, 7 regions increased room occupancy, 1 region achieved the same level of occupancy and 1 region decreased room occupancy compared with the same month last year. The region that recorded the greatest increase in room occupancy was Greater London, from 62% in September 2021 to 82% in September 2022. Meanwhile, Southwest England was the only region that recorded a decrease in room occupancy, from 82% to 81%.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most, from 71% to 81%, followed by Small Town hotel occupancy, which increased from 75% to 79%. Meanwhile, Countryside hotel occupancy decreased from 79% to 74% and Seaside hotel occupancy decreased the most from 83% to 77%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most from 69% to 80%. There were smaller increases in room occupancy among hotels in the three smaller size categories. Hotels with 1-25 rooms increased occupancy from 78% to 79%, hotels with 26-50 rooms increased occupancy from 79% to 80% and hotels with 51-100 rooms increased occupancy from 81% to 82%.

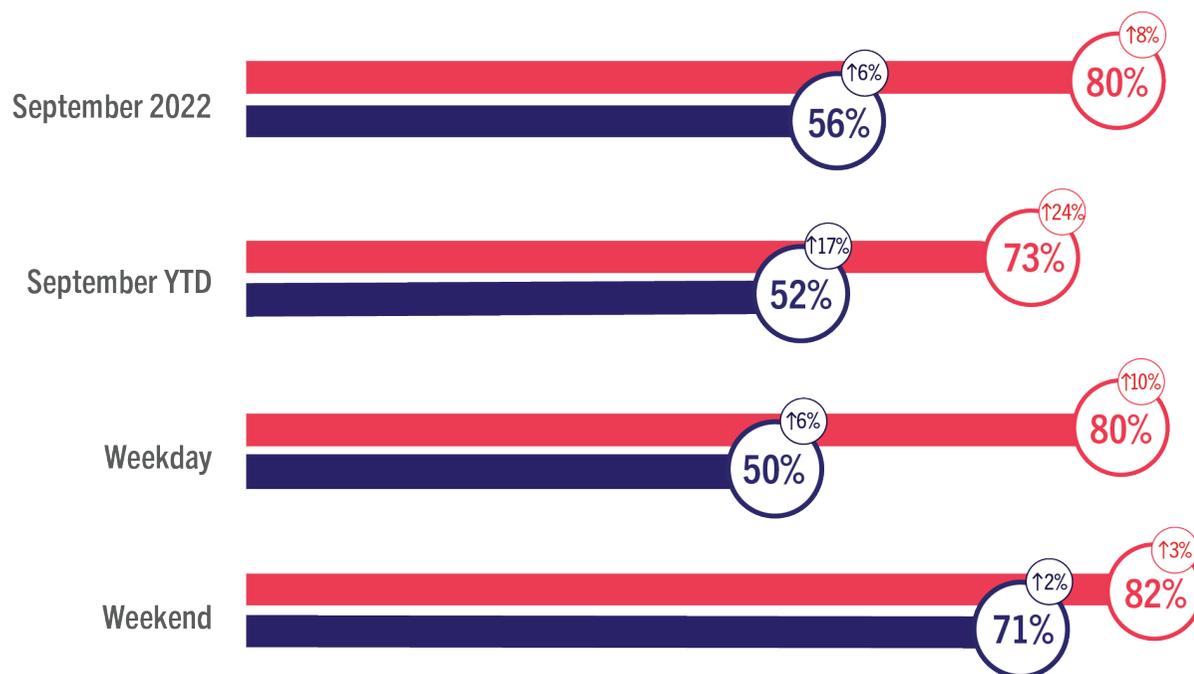
Throughout this report occupancy comparisons with last year are in absolute terms. Meanwhile, ADR and RevPAR year-on-year comparisons are in relative terms. Please see the Methodology Statement for more information on this, and regarding the data during the Covid-19 pandemic.



England Room and Bedspace Occupancy

At a glance - September 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 - September

Room Occupancy

	2019	2020	2021	2022
September	83%	45%	72%	80%
September YTD	78%	44%	49%	73%
Weekday	82%	43%	69%	80%
Weekend	85%	52%	80%	82%

Bedspace Occupancy

	2019	2020	2021	2022
September	57%	32%	50%	56%
September YTD	56%	31%	35%	52%
Weekday	51%	27%	43%	50%
Weekend	73%	44%	68%	71%

Room supply and room demand

Year-on-year relative percentage change

	2019	2020	2021	2022
Room Supply	2.2%	-7.0%	6.4%	1.7%
Room Demand	1.5%	-49.1%	69.0%	13.3%

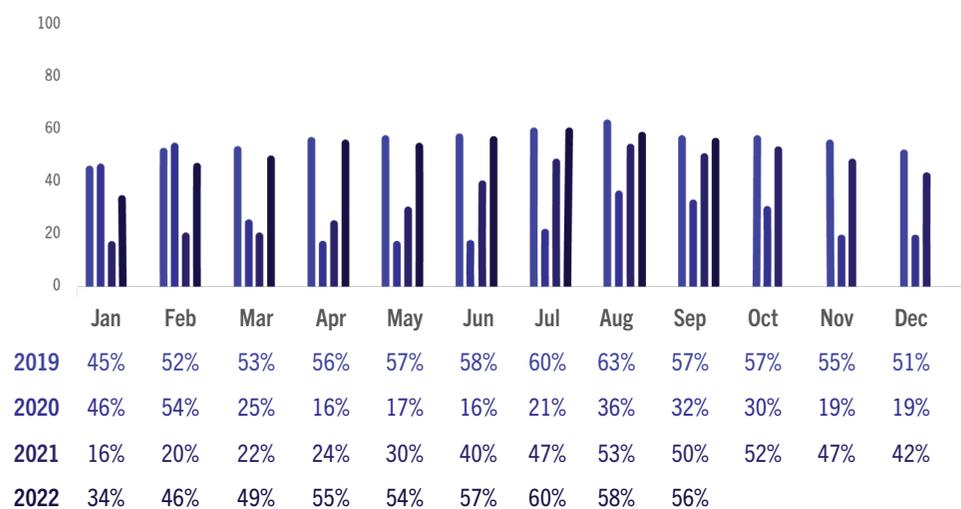


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month

England ADR and RevPAR

At a glance - September 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 – September

ADR

	2019	2020	2021	2022
September	£105.08	£70.81	£102.87	£124.51
Weekday	£106.66	£67.75	£97.43	£121.99
Weekend	£100.92	£77.81	£115.84	£130.17

RevPAR

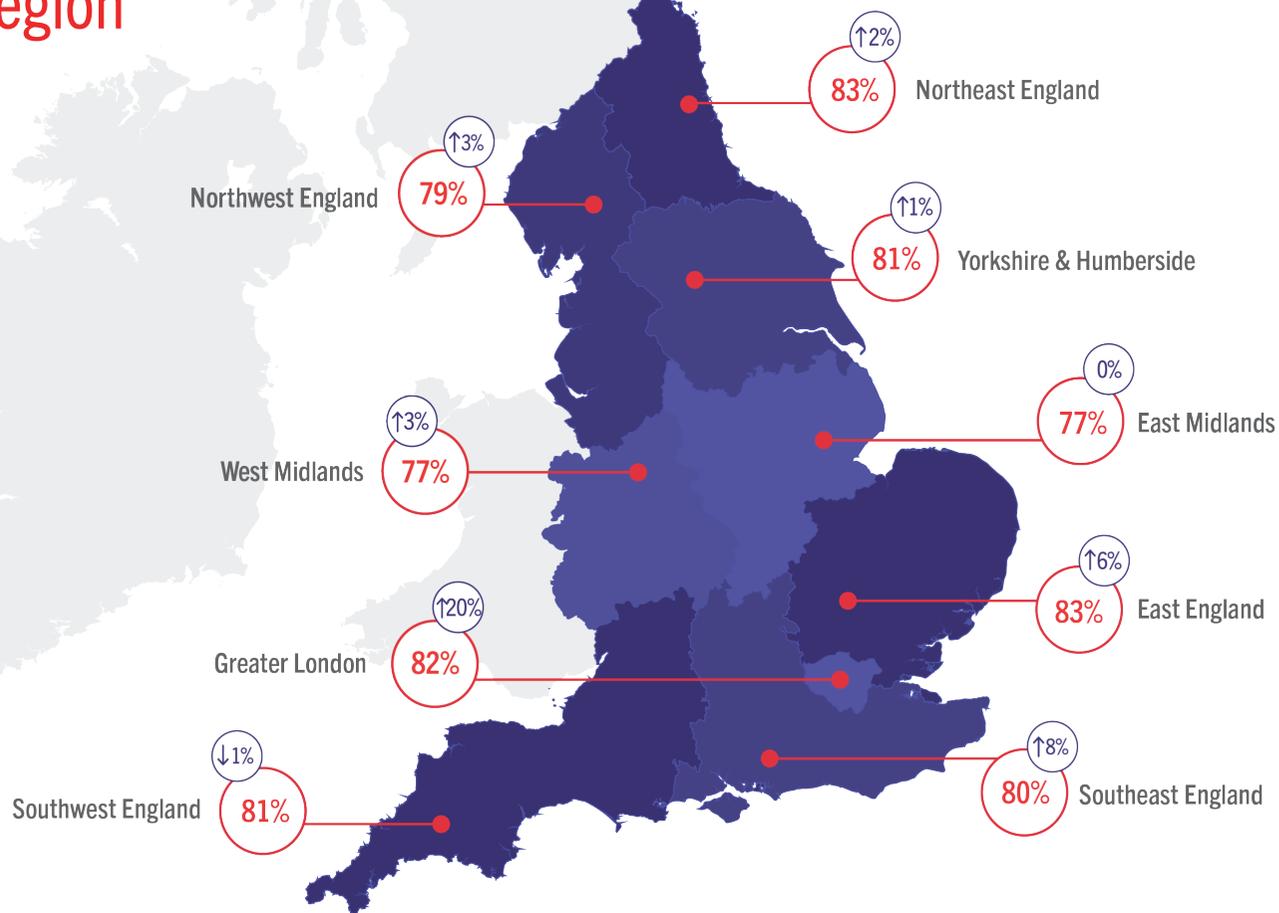
	2019	2020	2021	2022
September	£87.31	£32.18	£74.24	£100.13
Weekday	£87.70	£29.23	£67.57	£97.02
Weekend	£86.25	£40.27	£92.60	£107.38



Room Occupancy By Region

At a glance - September 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 - September

Room Occupancy

	2019	2020	2021	2022
East England	81%	59%	77%	83%
East Midlands	79%	52%	77%	77%
Greater London	87%	29%	62%	82%
Northeast England	80%	50%	81%	83%
Northwest England	81%	48%	76%	79%
Southeast England	83%	48%	72%	80%
Southwest England	85%	69%	82%	81%
West Midlands	79%	42%	74%	77%
Yorkshire & Humberside	81%	53%	80%	81%

Bedspace Occupancy

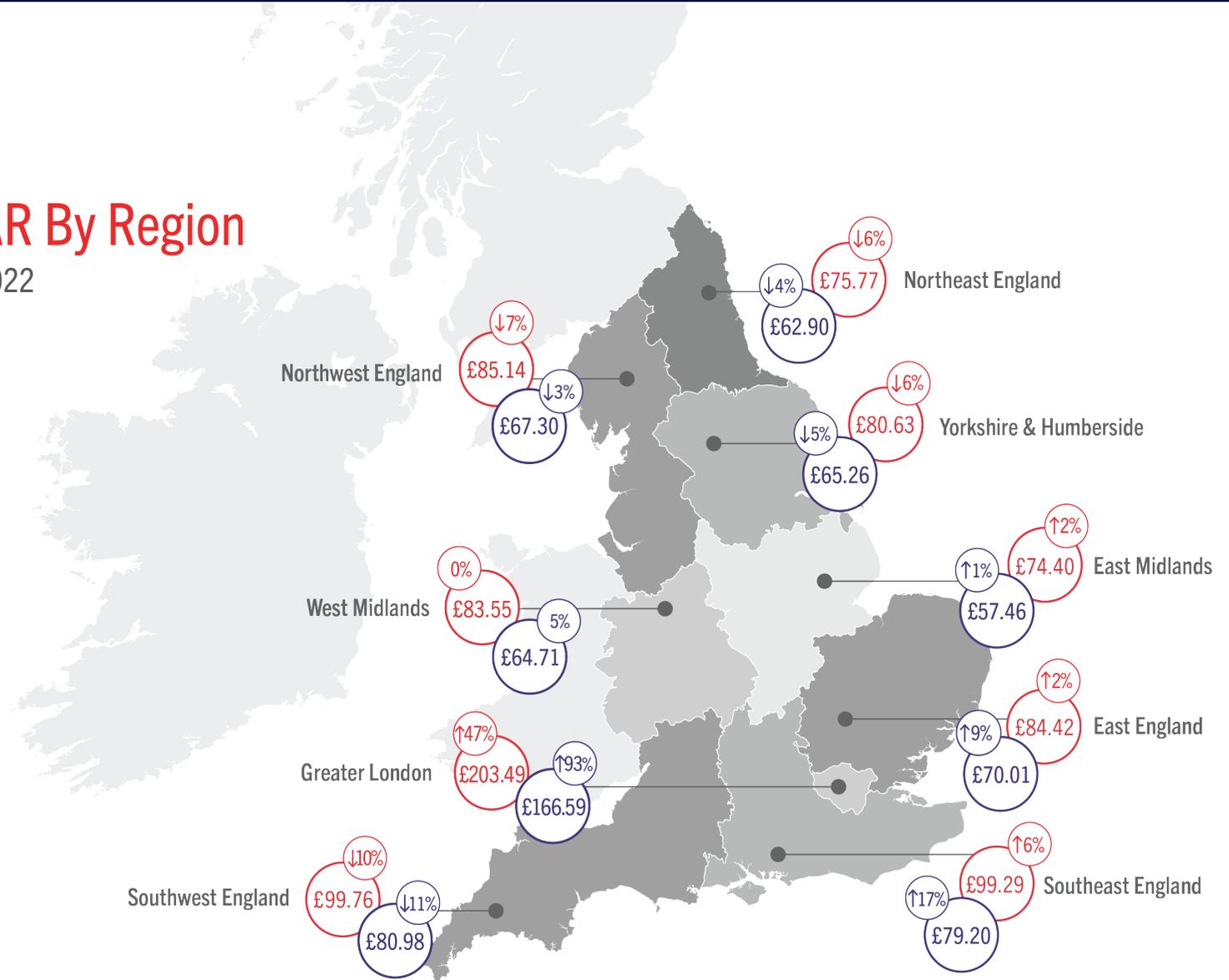
	2019	2020	2021	2022
East England	56%	40%	53%	58%
East Midlands	53%	35%	52%	53%
Greater London	61%	21%	44%	58%
Northeast England	55%	34%	56%	58%
Northwest England	56%	33%	52%	55%
Southeast England	57%	33%	49%	55%
Southwest England	58%	47%	56%	56%
West Midlands	52%	27%	49%	52%
Yorkshire & Humberside	57%	37%	56%	57%

ADR and RevPAR By Region

At a glance - September 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 - September

ADR

	2019	2020	2021	2022
East England	£70.11	£59.81	£83.16	£84.42
East Midlands	£65.06	£53.20	£73.27	£74.40
Greater London	£168.74	£93.81	£138.80	£203.49
Northeast England	£65.13	£56.60	£80.91	£75.77
Northwest England	£75.04	£62.64	£91.06	£85.14
Southeast England	£81.19	£71.15	£93.88	£99.29
Southwest England	£82.44	£81.49	£110.76	£99.76
West Midlands	£72.43	£54.74	£83.32	£83.55
Yorkshire & Humberside	£67.68	£61.69	£85.69	£80.63

RevPAR

	2019	2020	2021	2022
East England	£56.86	£35.00	£64.24	£70.01
East Midlands	£51.24	£27.67	£56.62	£57.46
Greater London	£146.45	£27.52	£86.37	£166.59
Northeast England	£52.14	£28.05	£65.77	£62.90
Northwest England	£60.78	£30.01	£69.17	£67.30
Southeast England	£67.08	£34.12	£67.78	£79.20
Southwest England	£70.22	£56.52	£91.04	£80.98
West Midlands	£57.32	£22.76	£61.87	£64.71
Yorkshire & Humberside	£55.03	£32.88	£68.43	£65.26

Room Occupancy By Destination Type

At a glance - September 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 Destination Type

Data Tables - September

Room Occupancy

	2019	2020	2021	2022
City / Large Town	83%	43%	71%	81%
Small Town	81%	55%	75%	79%
Countryside	84%	70%	79%	74%
Seaside	84%	75%	83%	77%

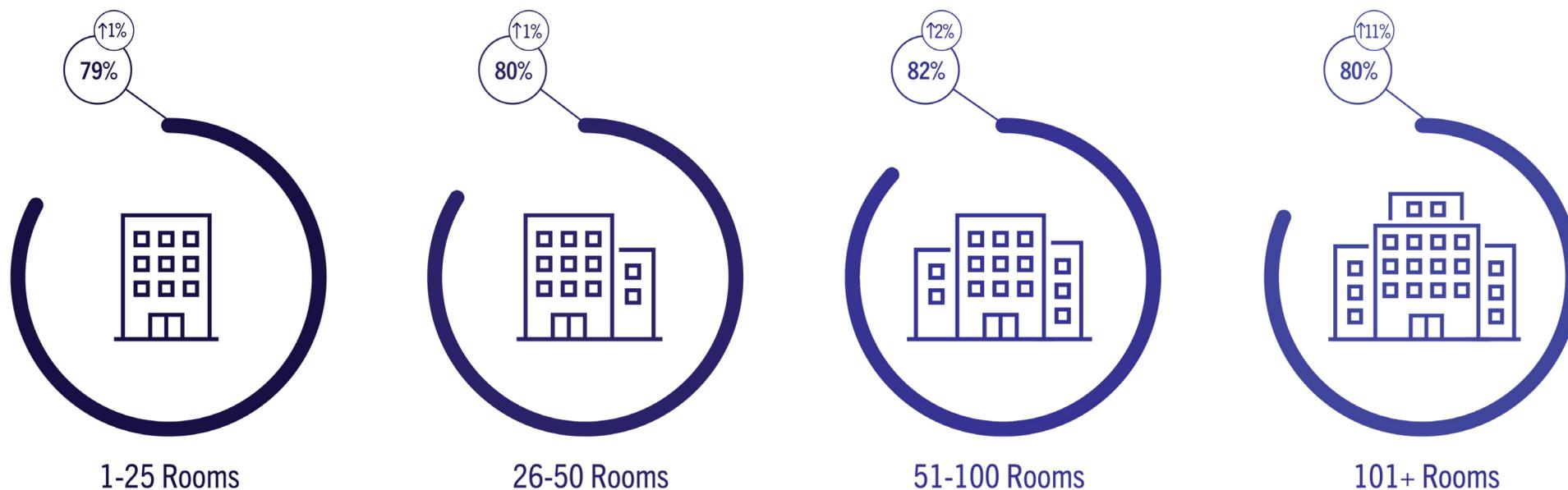
Bedspace Occupancy

	2019	2020	2021	2022
City / Large Town	57%	29%	48%	56%
Small Town	57%	39%	53%	56%
Countryside	56%	47%	52%	50%
Seaside	61%	54%	60%	56%



Room Occupancy By Number of Rooms

At a glance - September 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 - September

Room Occupancy

	2019	2020	2021	2022
1 to 25 Rooms	79%	61%	78%	79%
26 to 50 Rooms	81%	63%	79%	80%
51 to 100 Rooms	82%	60%	81%	82%
101+ Rooms	84%	39%	69%	80%

Bedspace Occupancy

	2019	2020	2021	2022
1 to 25 Rooms	56%	43%	55%	57%
26 to 50 Rooms	57%	44%	56%	57%
51 to 100 Rooms	59%	44%	58%	60%
101+ Rooms	57%	26%	47%	55%



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=3,532).

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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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