

VisitEngland™



England Occupancy Survey

December 2022 Results

Created by





Summary of Results

When comparing December 2022 results with December 2021, **room occupancy** in December 2022 increased from 56% to 71%, whilst **bedspace occupancy** increased from 42% to 53%. In December 2022, room supply increased by 1.4% (in relative terms), when compared with December 2021. Meanwhile, **room demand** increased by 27.5% (in relative terms), when compared with December 2021.

RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 56% to £85.72 in December 2022, 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 three regions that recorded the greatest change in room occupancy from last year were Greater London, which increased occupancy from 53% to 76%, followed by Southeast England, which increased occupancy from 55% to 70%, and East England, which increased occupancy from 60% to 73%.

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most from 56% to 72%, followed by Small Town hotel occupancy, which increased from 56% to 67%, and Countryside hotel occupancy, which increased from 54% to 60%. The smallest change from last year was recorded for Seaside hotels as occupancy increased from 59% to 63%.

Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most from 54% to 71%, followed by hotels with 51-100 rooms, which increased occupancy from 64% to 72%, and hotels with 26-50 rooms which increased occupancy from 58% to 67%. The smallest change from last year was recorded for hotels with 1-25 rooms as occupancy increased from 58% to 66%.

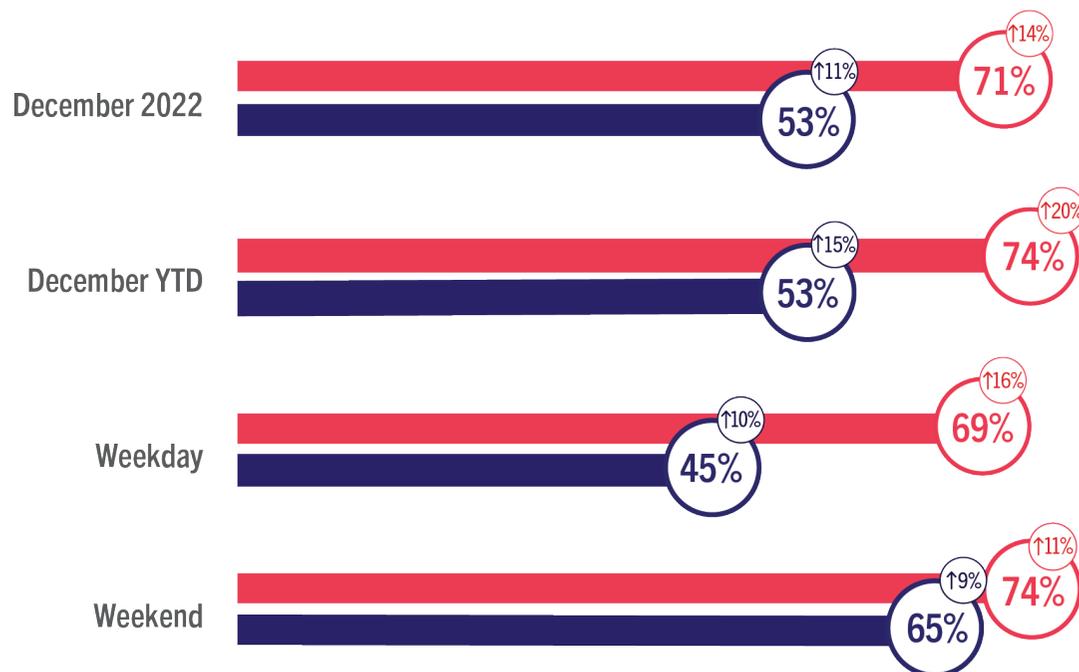
Throughout this report occupancy comparisons with last year are in absolute terms. Meanwhile, ADR and RevPAR year-on-year comparisons are in relative terms. Please see the Methodology Statement for more information on this, and regarding the data during the Covid-19 pandemic.



England Room and Bedspace Occupancy

At a glance - December 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 - December

Room Occupancy

	2019	2020	2021	2022
December	71%	27%	56%	71%
December YTD	78%	41%	53%	74%
Weekday	68%	27%	53%	69%
Weekend	78%	27%	63%	74%

Bedspace Occupancy

	2019	2020	2021	2022
December	51%	19%	42%	53%
December YTD	55%	29%	38%	53%
Weekday	44%	17%	35%	45%
Weekend	69%	23%	56%	65%

Room supply and room demand

Year-on-year relative percentage change

	2019	2020	2021	2022
Room Supply	1.7%	-12.6%	13.2%	1.4%
Room Demand	-0.1%	-67.1%	139.2%	27.5%

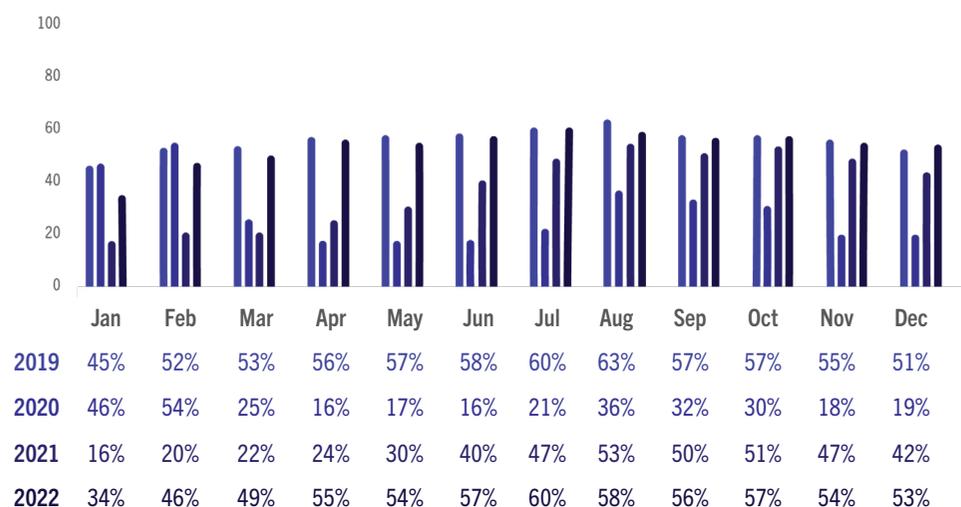


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month

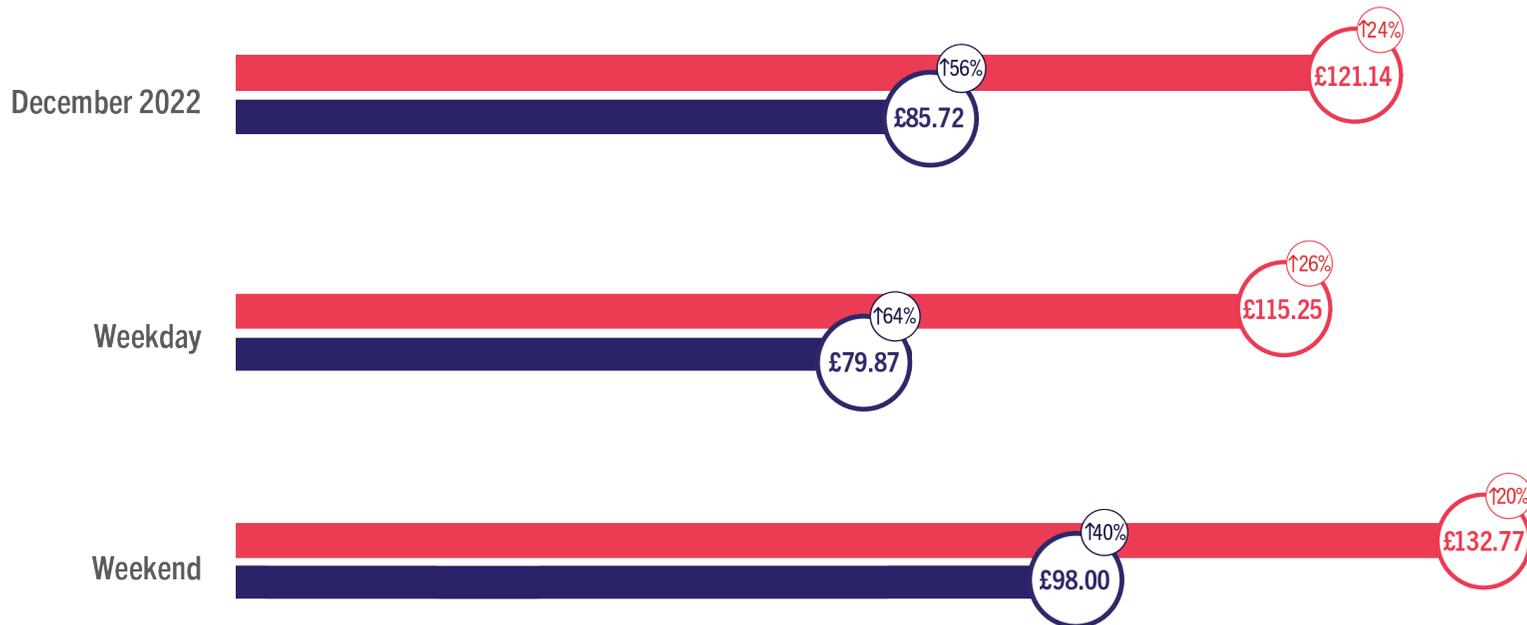


England Bedspace Occupancy by Month

England ADR and RevPAR

At a glance - December 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 – December

ADR

	2019	2020	2021	2022
December	£98.86	£61.92	£97.50	£121.14
Weekday	£99.60	£59.13	£91.31	£115.25
Weekend	£97.03	£69.92	£110.27	£132.77

RevPAR

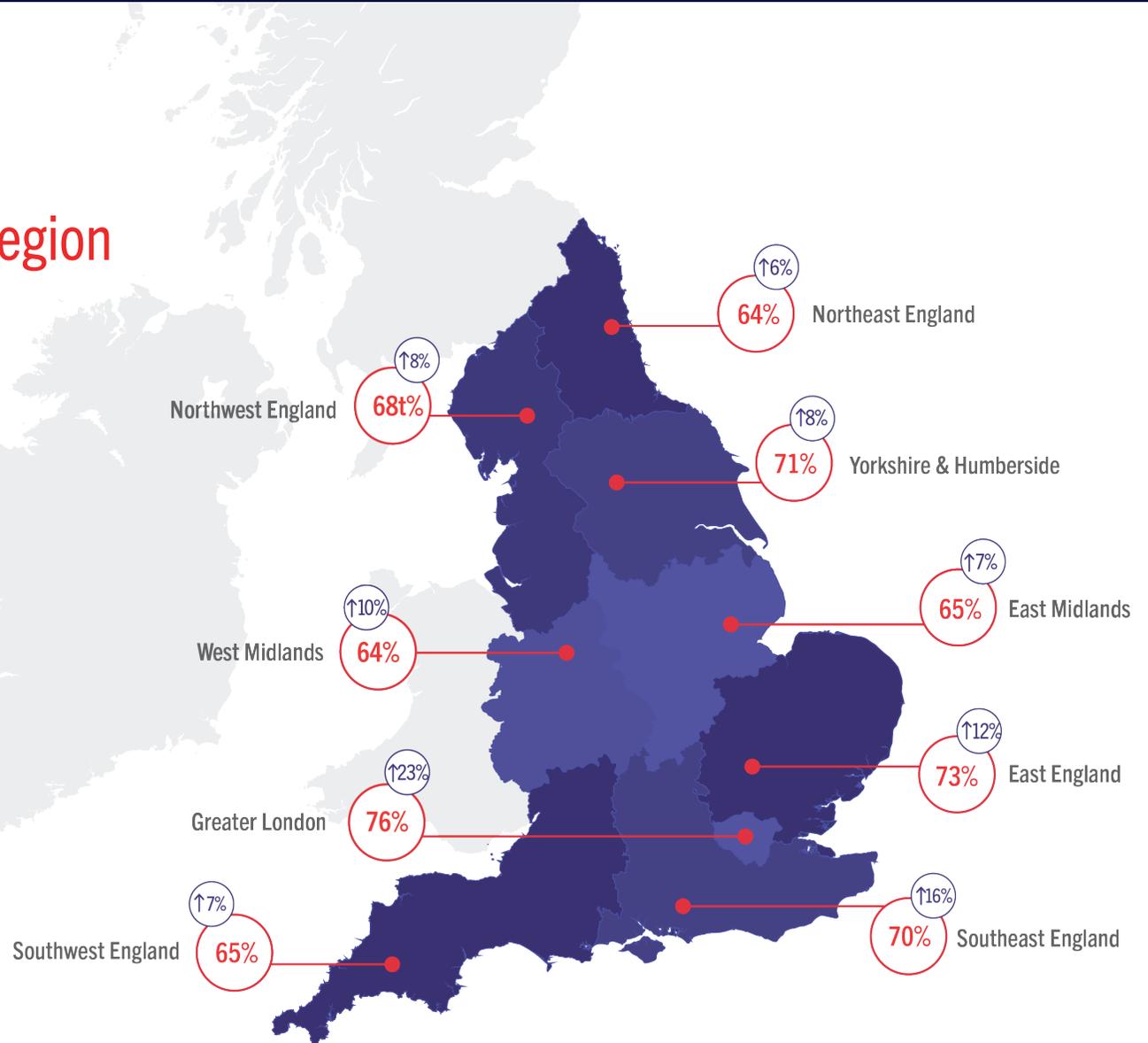
	2019	2020	2021	2022
December	£70.00	£16.50	£54.89	£85.72
Weekday	£67.93	£15.74	£48.80	£79.87
Weekend	£75.94	£18.67	£69.79	£98.00



Room Occupancy By Region

At a glance - December 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 - December

Room Occupancy

	2019	2020	2021	2022
East England	68%	35%	60%	73%
East Midlands	64%	28%	58%	65%
Greater London	80%	22%	53%	76%
Northeast England	63%	22%	58%	64%
Northwest England	69%	27%	60%	68%
Southeast England	67%	29%	55%	70%
Southwest England	65%	32%	58%	65%
West Midlands	64%	23%	54%	64%
Yorkshire & Humberside	69%	26%	62%	71%

Bedspace Occupancy

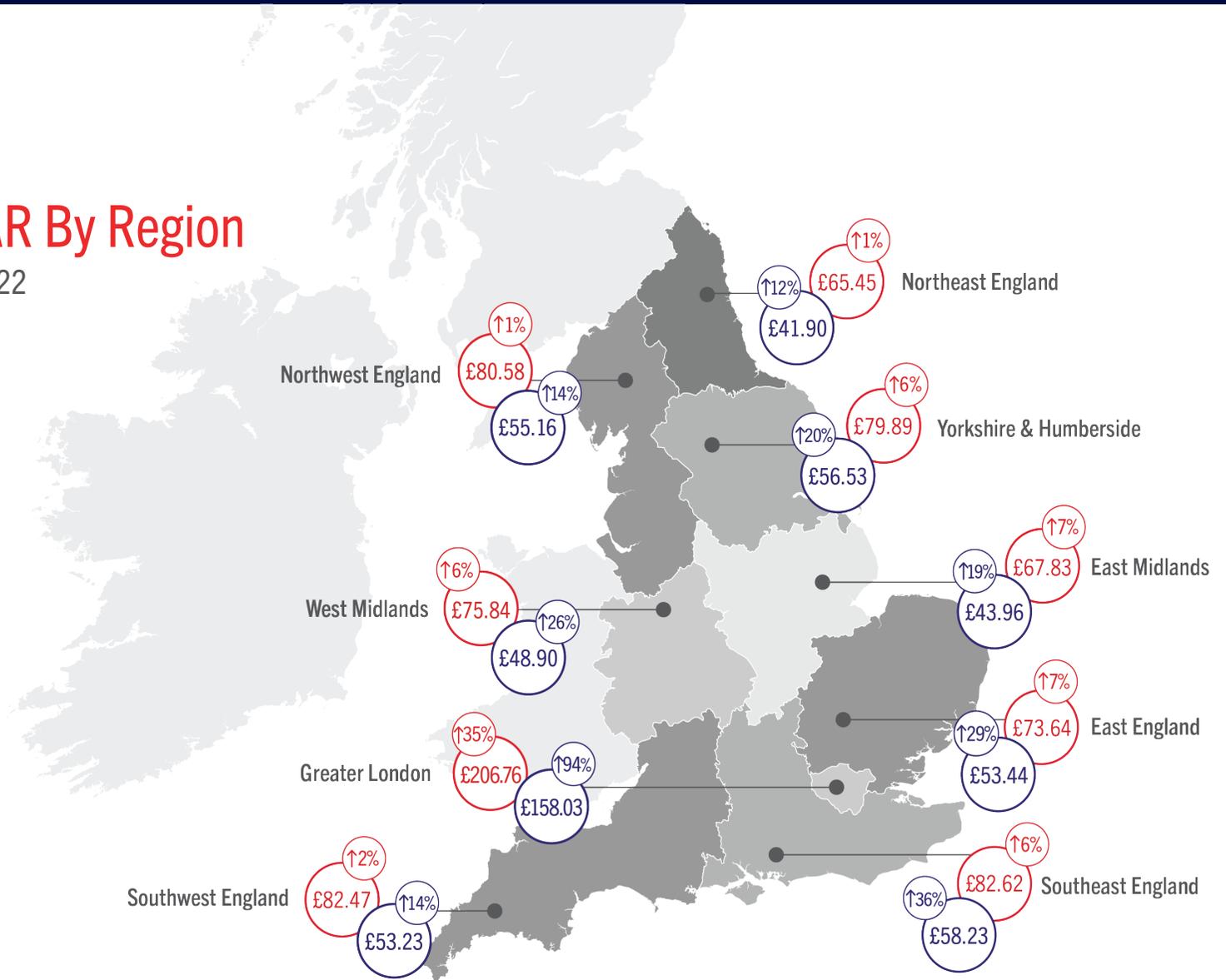
	2019	2020	2021	2022
East England	49%	25%	44%	54%
East Midlands	46%	20%	43%	49%
Greater London	59%	16%	39%	57%
Northeast England	45%	16%	42%	47%
Northwest England	50%	19%	44%	51%
Southeast England	48%	21%	40%	52%
Southwest England	46%	23%	42%	47%
West Midlands	44%	16%	38%	46%
Yorkshire & Humberside	50%	18%	46%	53%

ADR and RevPAR By Region

At a glance - December 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 - December

ADR

	2019	2020	2021	2022
East England	£62.42	£48.34	£68.81	£73.64
East Midlands	£59.67	£45.81	£63.61	£67.83
Greater London	£157.88	£87.55	£153.69	£206.76
Northeast England	£56.59	£46.13	£64.82	£65.45
Northwest England	£71.05	£53.63	£80.13	£80.58
Southeast England	£68.74	£58.53	£78.08	£82.62
Southwest England	£70.79	£58.60	£81.08	£82.47
West Midlands	£64.63	£44.27	£71.26	£75.84
Yorkshire & Humberside	£64.60	£53.95	£75.56	£79.89

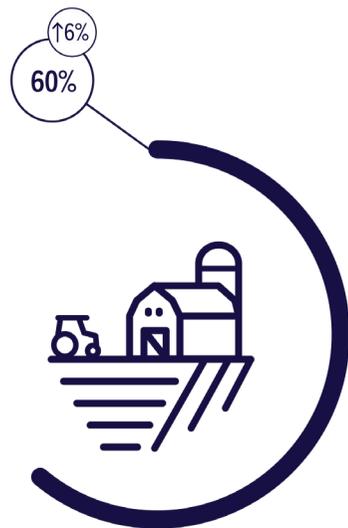
RevPAR

	2019	2020	2021	2022
East England	£42.23	£16.76	£41.36	£53.44
East Midlands	£38.00	£12.70	£36.94	£43.96
Greater London	£126.99	£19.22	£81.37	£158.03
Northeast England	£35.63	£10.15	£37.46	£41.90
Northwest England	£49.19	£14.31	£48.23	£55.16
Southeast England	£45.72	£16.96	£42.80	£58.23
Southwest England	£45.80	£18.79	£46.87	£53.23
West Midlands	£41.26	£10.26	£38.74	£48.90
Yorkshire & Humberside	£44.78	£13.83	£47.07	£56.53



Room Occupancy By Destination Type

At a glance - December 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 - December

Room Occupancy

	2019	2020	2021	2022
City / Large Town	72%	26%	56%	72%
Small Town	65%	29%	56%	67%
Countryside	61%	27%	54%	60%
Seaside	64%	32%	59%	63%

Bedspace Occupancy

	2019	2020	2021	2022
City / Large Town	51%	18%	41%	53%
Small Town	48%	21%	42%	50%
Countryside	43%	19%	38%	43%
Seaside	49%	25%	46%	50%



Room Occupancy By Number of Rooms

At a glance - December 2022



1-25 Rooms



26-50 Rooms



51-100 Rooms



101+ Rooms

*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 - December

Room Occupancy

	2019	2020	2021	2022
1 to 25 Rooms	66%	29%	58%	66%
26 to 50 Rooms	66%	32%	58%	67%
51 to 100 Rooms	69%	37%	64%	72%
101+ Rooms	72%	23%	54%	71%

Bedspace Occupancy

	2019	2020	2021	2022
1 to 25 Rooms	49%	22%	44%	50%
26 to 50 Rooms	48%	23%	43%	50%
51 to 100 Rooms	51%	27%	48%	56%
101+ Rooms	52%	16%	39%	52%



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=3,521).

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.

For more information on STR's other available products and pricing:

Website: www.str.com

Telephone: +44 (0) 207 922 1930

Email: industrydata@str.com

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