

England Occupancy Survey

February 2024 Results

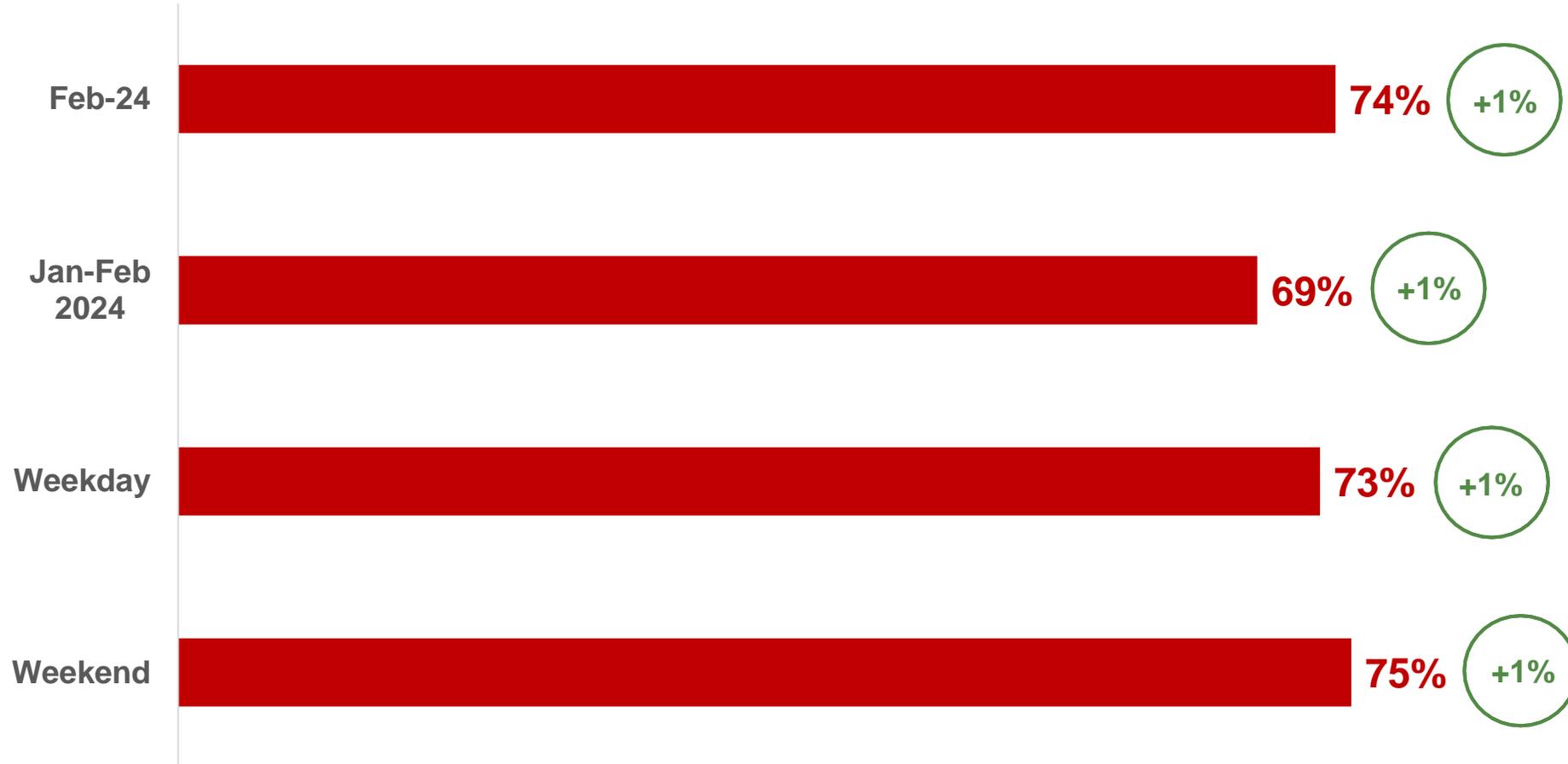
VisitEngland Research

Summary of Results

- When comparing February 2024 results with February 2023, **room occupancy** was up 1% to 74%. February 2024 was also up slightly on 2019 occupancy levels (73%).
- **Room supply** increased by 0.6% whilst **room demand** also increased, up 1.8% compared February 2023.
- **RevPAR**, which is the total room revenue divided by the total number of available rooms, increased by 2% to £77.18 in February 2024, when compared to the same month in 2023, sitting below annual inflation of 3.4% for the month.
- City/large town **destination types** reported the largest increase in occupancy in February 2024, up 2% to 75%. Seaside destinations remained on par and countryside and small town destinations saw a decline in occupancy.
- Assessing room occupancy by **establishment size**, the smallest hotels (1-25 rooms) decreased 5%, whilst the largest hotels (+100 rooms) saw an increase of 2% in February 2024 to 74%.
- **Regionally**, room occupancy continues to be mixed; London saw growth of 3% but remains behind 219 levels. All other regions are on par with or above 2019 levels, despite mixed performance for February 2024.

England Room Occupancy

At a glance – February 2024



x% % change from same period in previous year

England Room Occupancy

Data Tables – February 2024

Room Occupancy	2019	2021	2022	2023	2024
February	73%	29%	65%	73%	74%
February Year To Date	69%	26%	56%	68%	69%
Weekday	74%	33%	62%	73%	73%
Weekend	73%	20%	71%	74%	75%

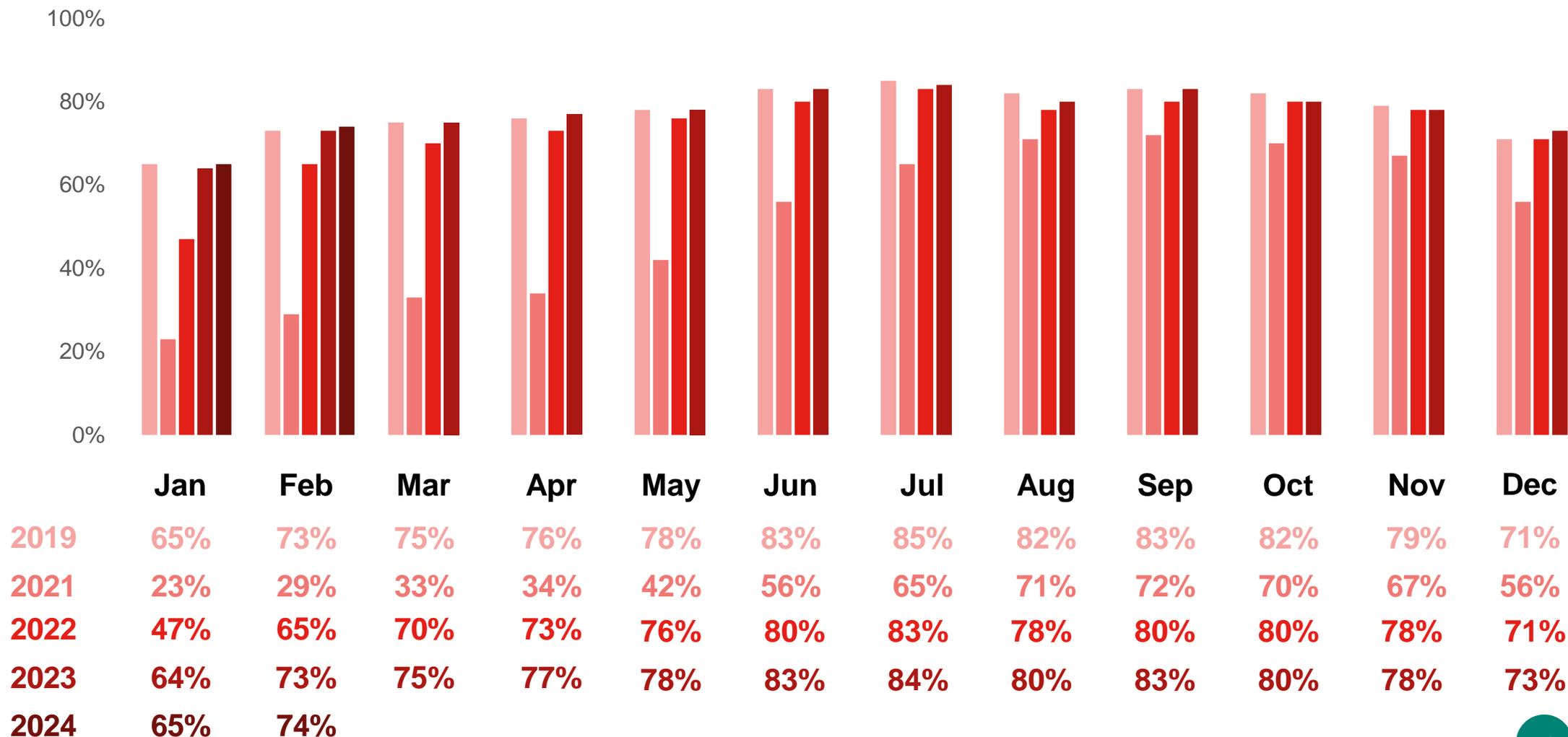
Room Supply and Room Demand <i>Year-on-year relative % change</i>	2019	2021	2022	2023	2024
Room Supply	2.3%	-23.3%	28.7%	1.1%	0.6%
Room Demand	2.0%	-69.3%	187.4%	14.1%	1.8%

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



England Room Occupancy

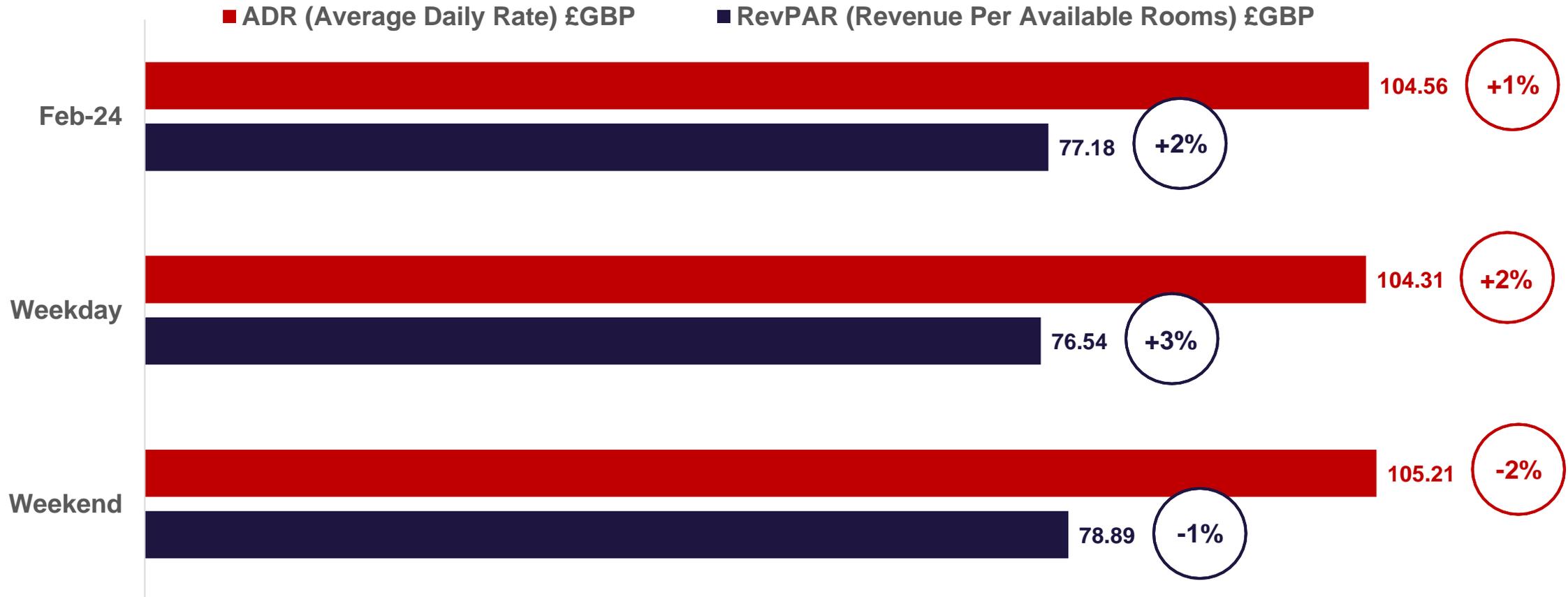
England Room Occupancy by Month



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



England ADR and RevPAR



England ADR and RevPAR

Data Tables – February 2024

ADR	2019	2021	2022	2023	2024
February	£87.33	£47.40	£87.80	£103.74	£104.56
Weekday	£89.60	£47.04	£83.47	£102.17	£104.31
Weekend	£81.59	£48.90	£97.30	£107.00	£105.21

RevPAR	2019	2021	2022	2023	2024
February	£64.02	£13.76	£56.94	£75.69	£77.18
Weekday	£65.90	£15.42	£52.06	£74.16	£76.54
Weekend	£59.31	£9.63	£69.15	£79.70	£78.89

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

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

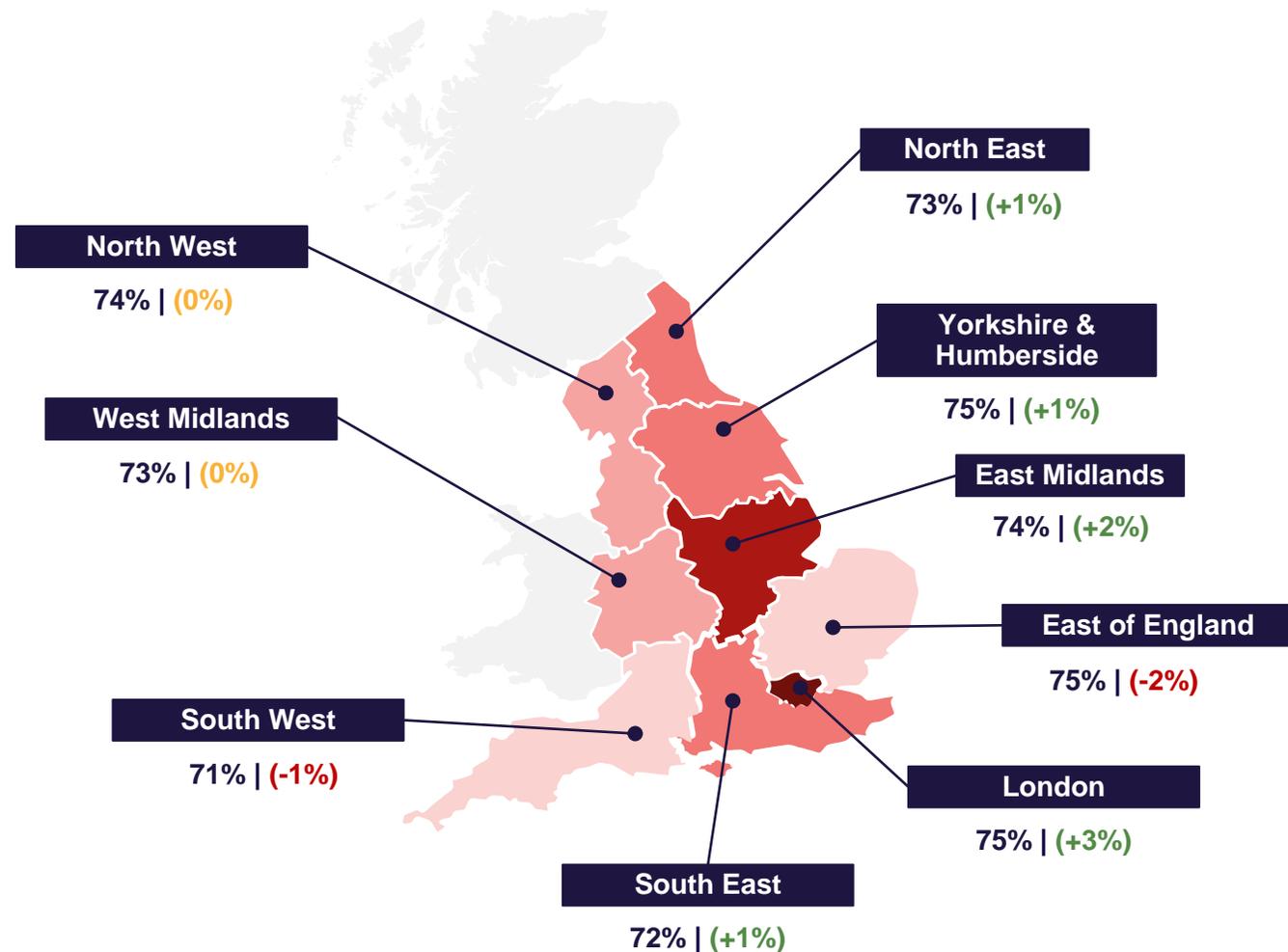


Room Occupancy by Region

At a glance – February 2024

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 – February 2024

Room Occupancy	2019	2021	2022	2023	2024
East England	72%	38%	69%	77%	75%
East Midlands	70%	33%	69%	73%	74%
Greater London	78%	24%	58%	73%	75%
Northeast England	68%	30%	69%	72%	73%
Northwest England	74%	26%	67%	73%	74%
Southeast England	70%	32%	64%	72%	72%
Southwest England	71%	36%	69%	71%	71%
West Midlands	72%	25%	67%	73%	73%
Yorkshire & Humberside	71%	26%	71%	75%	75%

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



ADR and RevPAR by Region

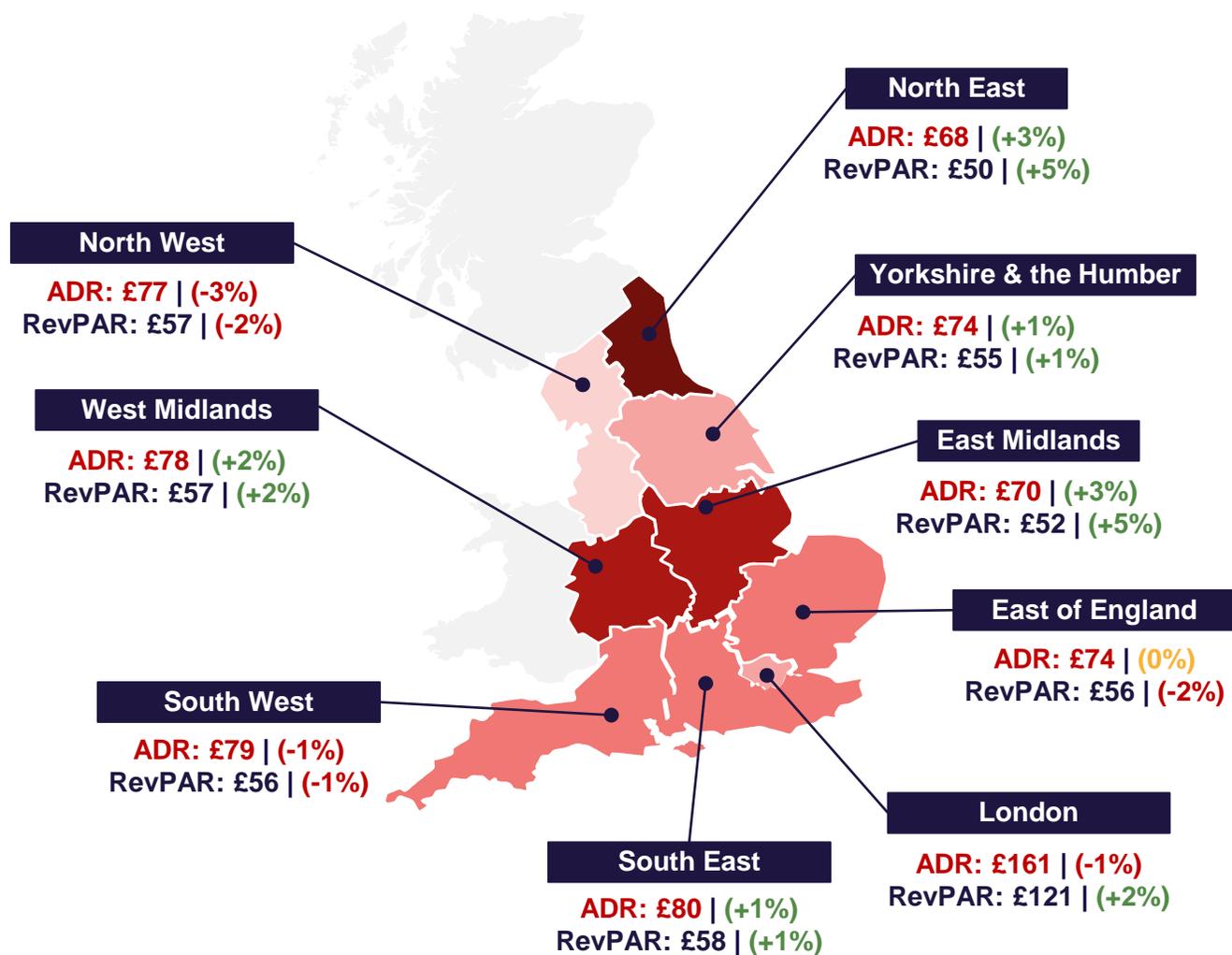
At a glance – February 2024

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)



UK annual inflation rate in February 2024 was **3.4%**



Colour grading of map based on year-on-year % change, relative to the other regions



ADR and RevPAR by Region

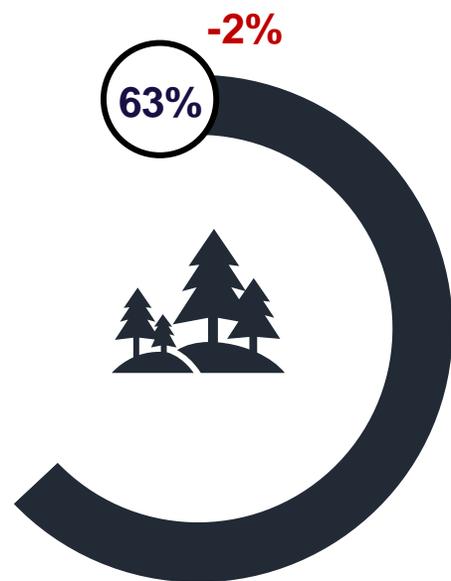
Data Tables – February 2024

ADR	2019	2021	2022	2023	2024	RevPAR	2019	2021	2022	2023	2024
East England	£62.86	£43.98	£68.02	£74.40	£74.06	East England	£45.02	£16.72	£47.17	£57.12	£55.82
East Midlands	£58.56	£44.00	£62.46	£68.01	£69.83	East Midlands	£41.16	£14.66	£43.29	£49.40	£51.69
Greater London	£132.91	£58.60	£130.97	£163.34	£161.23	Greater London	£103.41	£13.96	£76.55	£118.93	£121.42
Northeast England	£57.29	£44.57	£65.67	£67.13	£68.23	Northeast England	£38.82	£13.49	£45.41	£48.57	£49.94
Northwest England	£67.35	£46.23	£74.90	£79.20	£77.20	Northwest England	£49.62	£12.04	£50.51	£58.00	£56.81
Southeast England	£68.76	£45.60	£73.87	£79.79	£80.19	Southeast England	£48.38	£14.57	£47.62	£57.08	£57.74
Southwest England	£65.80	£43.43	£76.91	£79.40	£79.00	Southwest England	£46.81	£15.64	£52.94	£56.67	£55.96
West Midlands	£66.85	£43.30	£69.56	£76.62	£78.06	West Midlands	£47.91	£10.83	£46.46	£56.06	£57.01
Yorkshire & Humberside	£59.15	£42.46	£70.58	£73.18	£73.71	Yorkshire & Humberside	£42.20	£11.17	£50.45	£54.74	£55.43

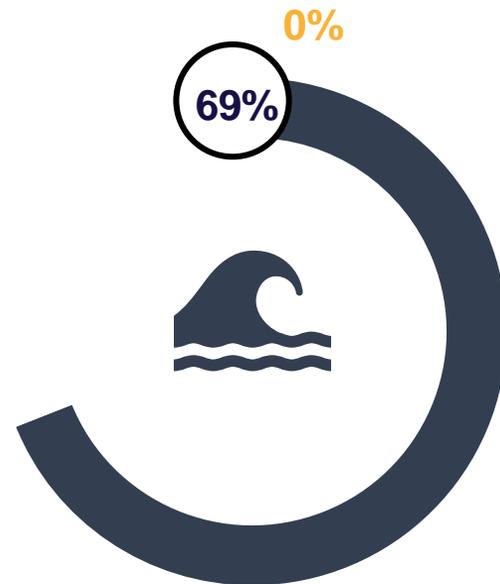
Note: Historical figures subject to change as new hotels submit data to STR

Room Occupancy by Destination Type

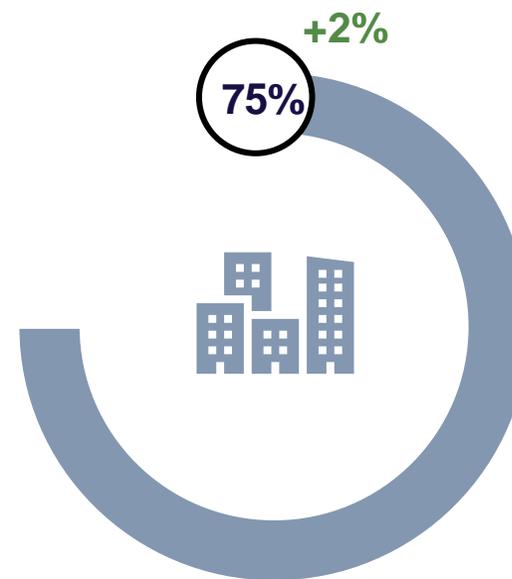
At a glance – February 2024



Countryside



Seaside



City / Large Town



Small Town

Room Occupancy by Destination Type

Data Tables – February 2024

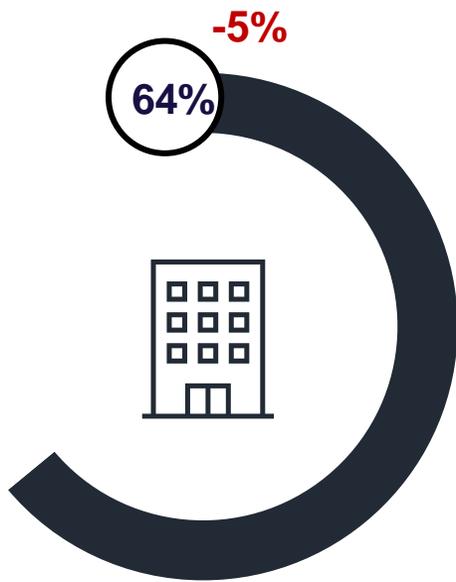
Room Occupancy	2019	2021	2022	2023	2024
City / Large Town	74%	29%	65%	74%	75%
Small Town	68%	31%	65%	70%	70%
Countryside	69%	31%	63%	64%	63%
Seaside	70%	35%	68%	69%	69%

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



Room Occupancy by Number of Rooms

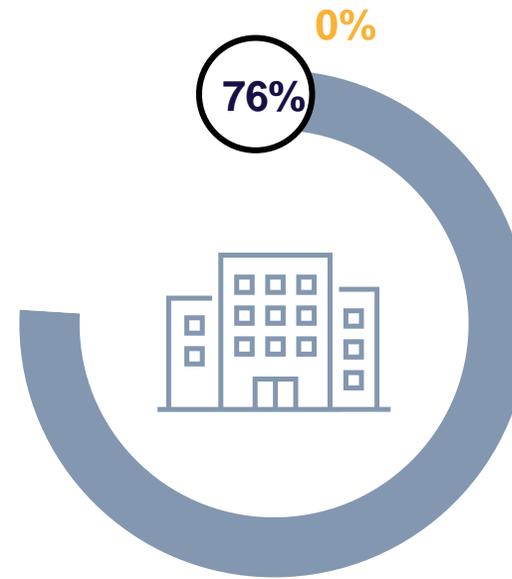
At a glance – February 2024



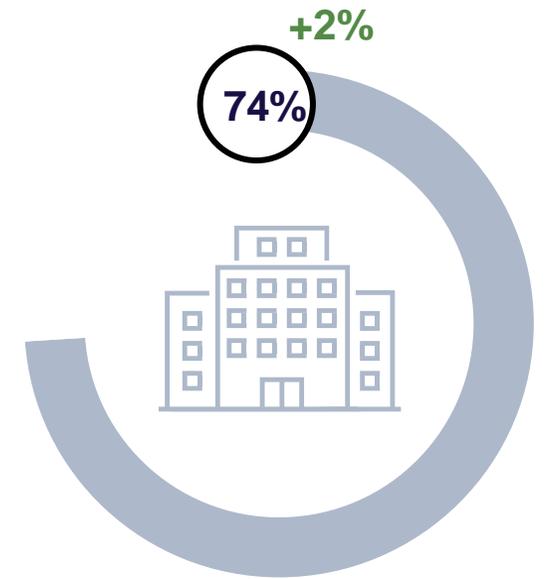
1-25 Rooms



26-50 Rooms



51-100 Rooms



100+ Rooms

Room Occupancy by Number of Rooms

Data Tables – February 2024

Room Occupancy	2019	2021	2022	2023	2024
1 to 25 Rooms	68%	37%	64%	67%	64%
26 to 50 Rooms	70%	37%	67%	71%	69%
51 to 100 Rooms	72%	42%	73%	76%	76%
101+ Rooms	74%	24%	62%	72%	74%

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=3,542)