



England Occupancy Survey

March 2024 Results

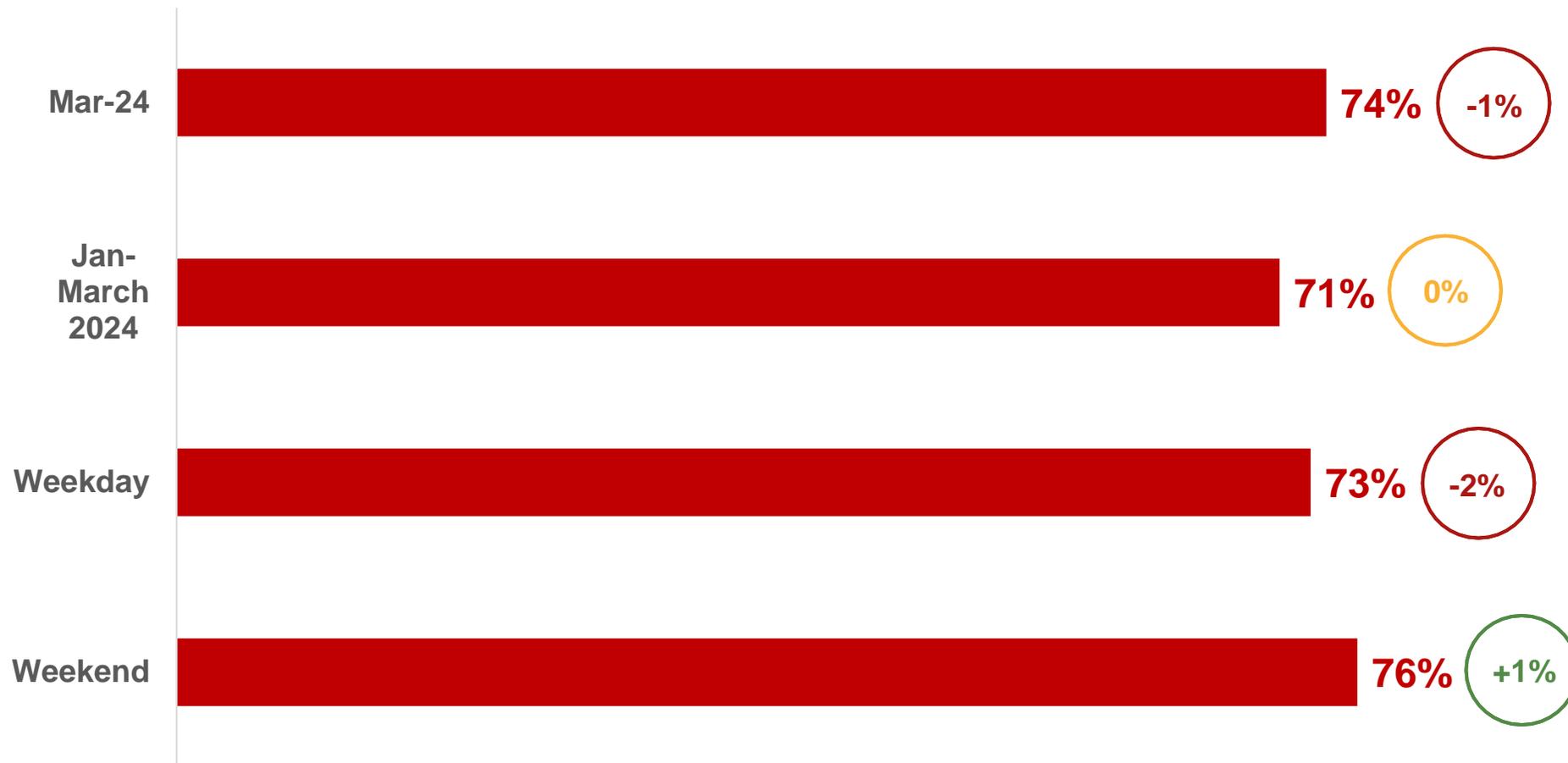
VisitEngland Research

Summary of Results

- When comparing March 2024 results with March 2023, **room occupancy** was down 1% to 74%. March 2024 was also down 1% on 2019 occupancy, whilst year to date figures were on par.
- **Room supply** increased by 0.7% whilst **room demand** fell 0.2% compared to March 2023.
- **RevPAR**, which is the total room revenue divided by the total number of available rooms, fell by 1% to £82.51 in March 2024, when compared to the same month in 2023, sitting below annual inflation of 3.2%.
- Countryside **destination types** reported the largest increase in occupancy in March 2024, up 11% to 72%. Seaside destinations also increased (+^) whilst city/large town and small town destinations both saw decreases of 1% compared to March 2023.
- Assessing room occupancy by **establishment size**, the smallest hotels (1-25 rooms) and (26-50 rooms) both decreased by 4%. The largest hotels (+100 rooms) remained on par with March 2023 at 75% occupancy.
- **Regionally**, room occupancy continues to be mixed; the western regions and the North East experienced growth whilst Eastern regions saw declines, with the East of England experiencing a fall of 6%. London is 5% behind 2019 levels, with all other regions either on par with or above 2019 levels in March 2024.

England Room Occupancy

At a glance – March 2024



x% % change from same period in previous year

England Room Occupancy

Data Tables – March 2024

Room Occupancy	2019	2021	2022	2023	2024
March	75%	33%	70%	75%	74%
March Year To Date	71%	28%	61%	71%	71%
Weekday	74%	37%	69%	75%	73%
Weekend	76%	21%	75%	76%	76%

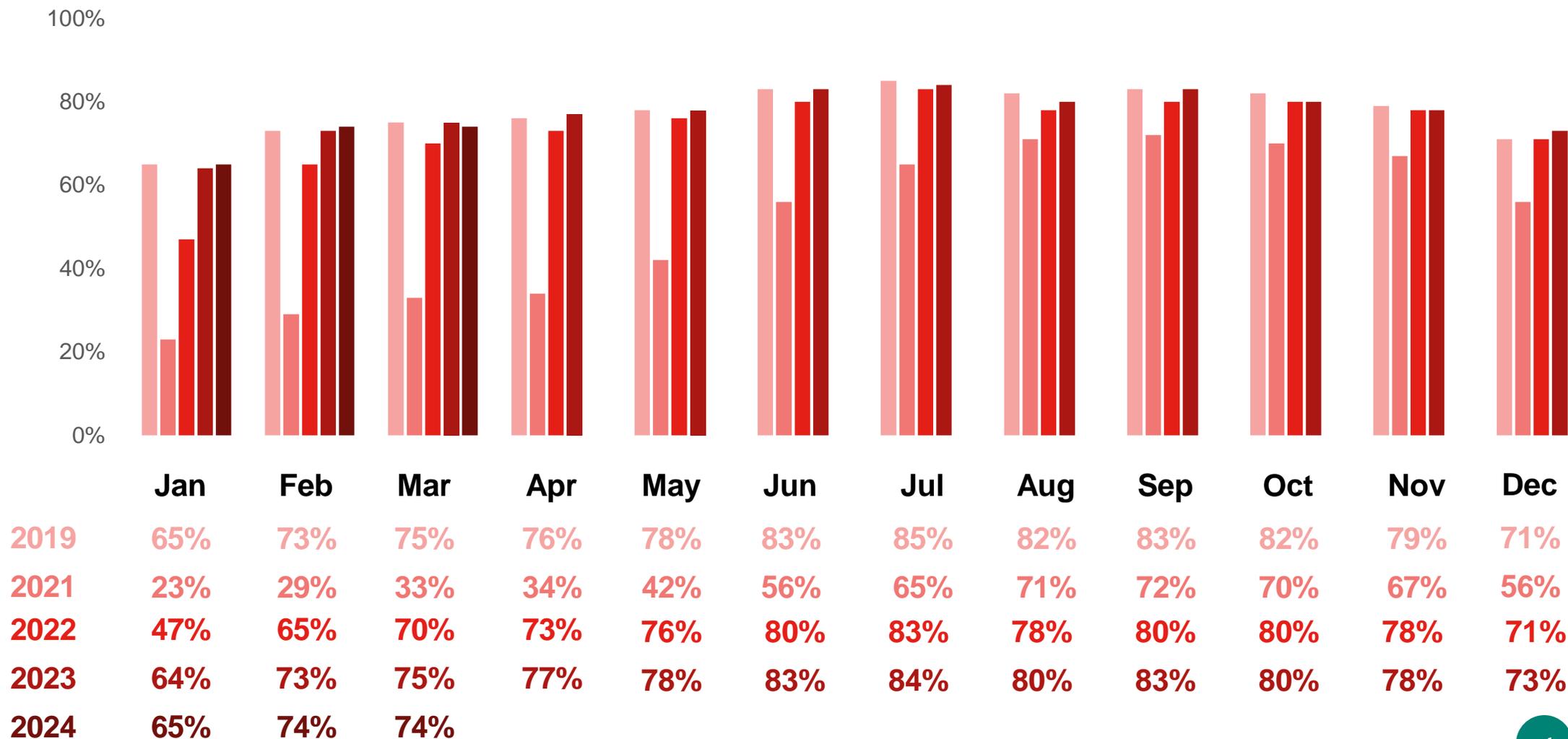
Room Supply and Room Demand Year-on-year relative % change	2019	2021	2022	2023	2024
Room Supply	2.1%	-21.7%	26.6%	0.7%	0.7%
Room Demand	1.9%	-30.5%	174.0%	7.5%	-0.2%

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



England Room Occupancy

England Room Occupancy by Month

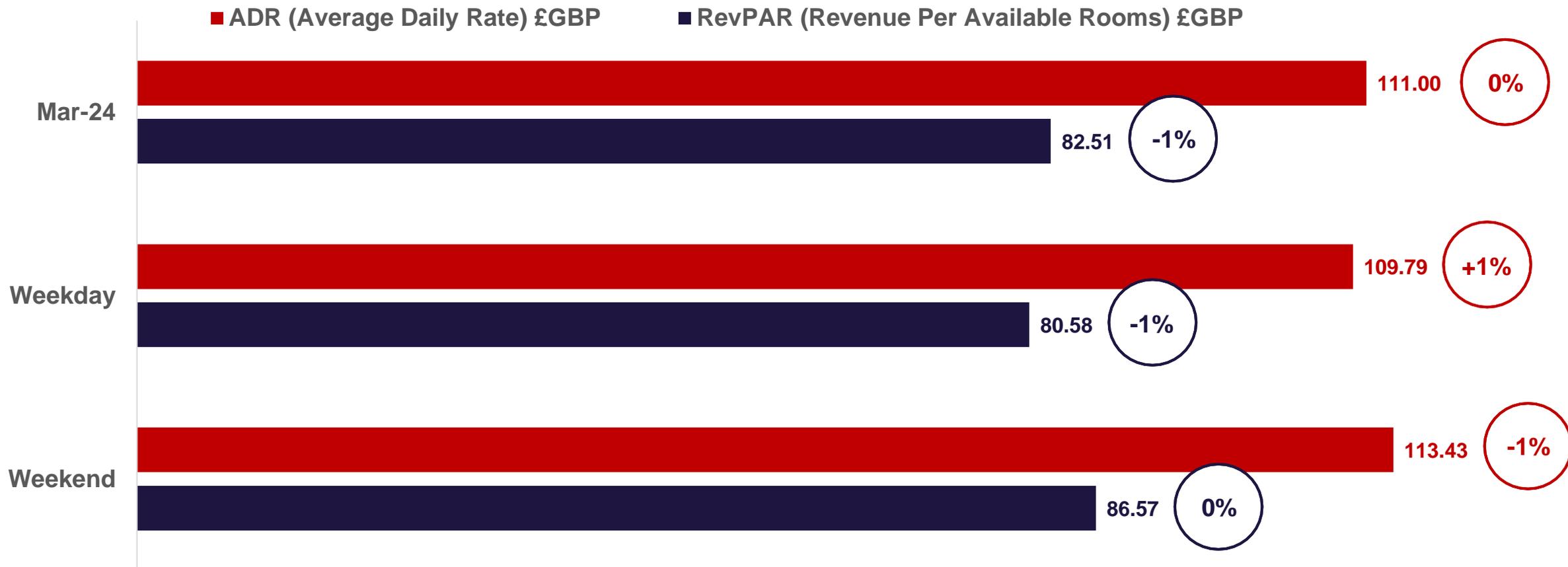


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England ADR and RevPAR

At a glance – March 2024



x% % change from same period in previous year

England ADR and RevPAR

Data Tables – March 2024

ADR	2019	2021	2022	2023	2024
March	£91.12	£48.30	£101.57	£110.83	£111.00
Weekday	£93.32	£48.08	£98.69	£109.16	£109.79
Weekend	£86.67	£49.42	£109.11	£114.55	£113.43

RevPAR	2019	2021	2022	2023	2024
March	£68.11	£15.71	£71.54	£83.11	£82.51
Weekday	£68.97	£17.58	£67.77	£81.68	£80.58
Weekend	£66.30	£10.34	£82.35	£86.87	£86.57

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

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

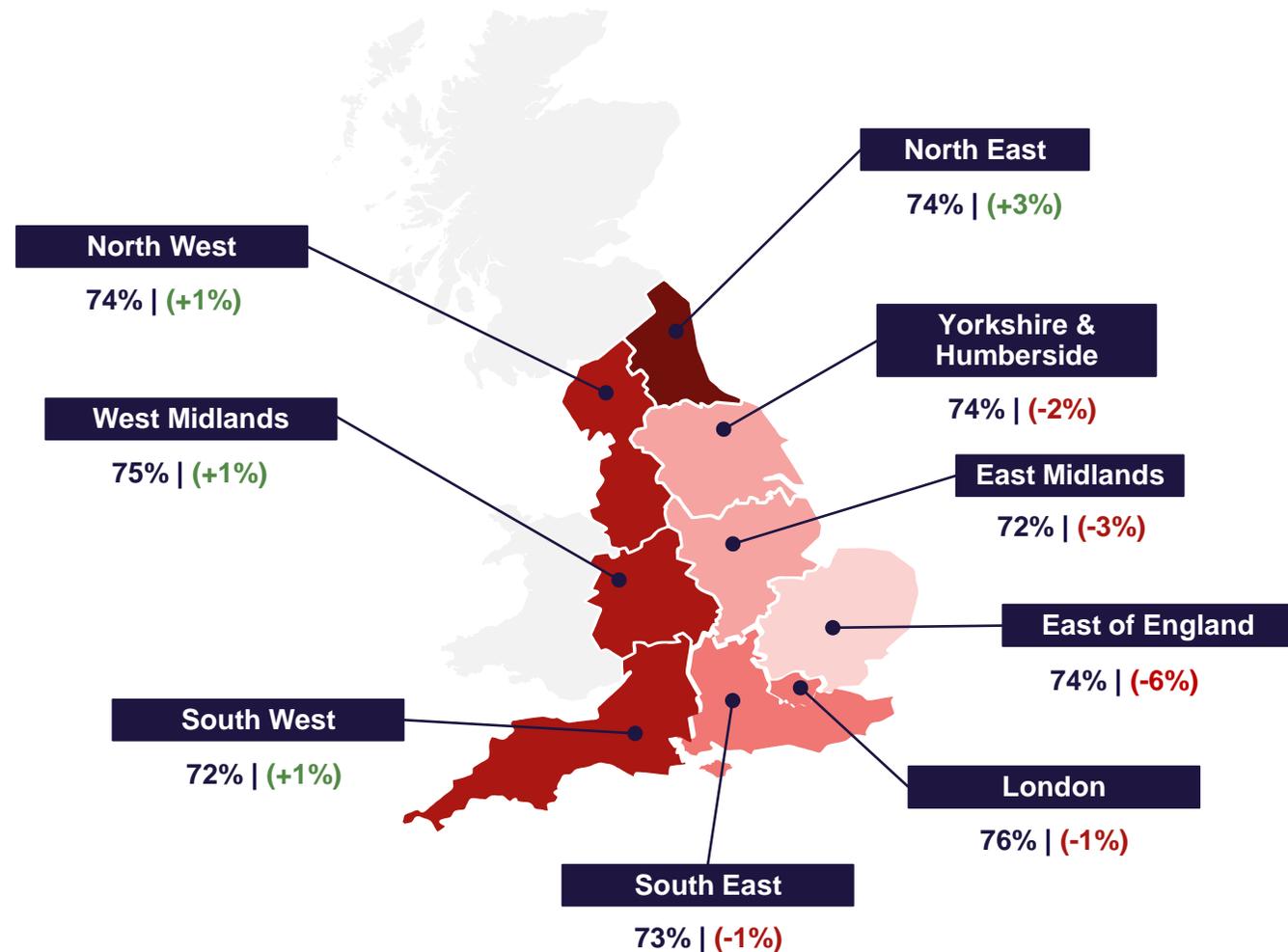


Room Occupancy by Region

At a glance – March 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 – March 2024

Room Occupancy	2019	2021	2022	2023	2024
East England	72%	43%	74%	78%	74%
East Midlands	72%	36%	72%	75%	72%
Greater London	81%	26%	71%	77%	76%
Northeast England	66%	30%	71%	72%	74%
Northwest England	73%	28%	69%	73%	74%
Southeast England	72%	37%	67%	74%	73%
Southwest England	72%	39%	71%	72%	72%
West Midlands	73%	29%	72%	75%	75%
Yorkshire & Humberside	72%	30%	73%	76%	74%

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



ADR and RevPAR by Region

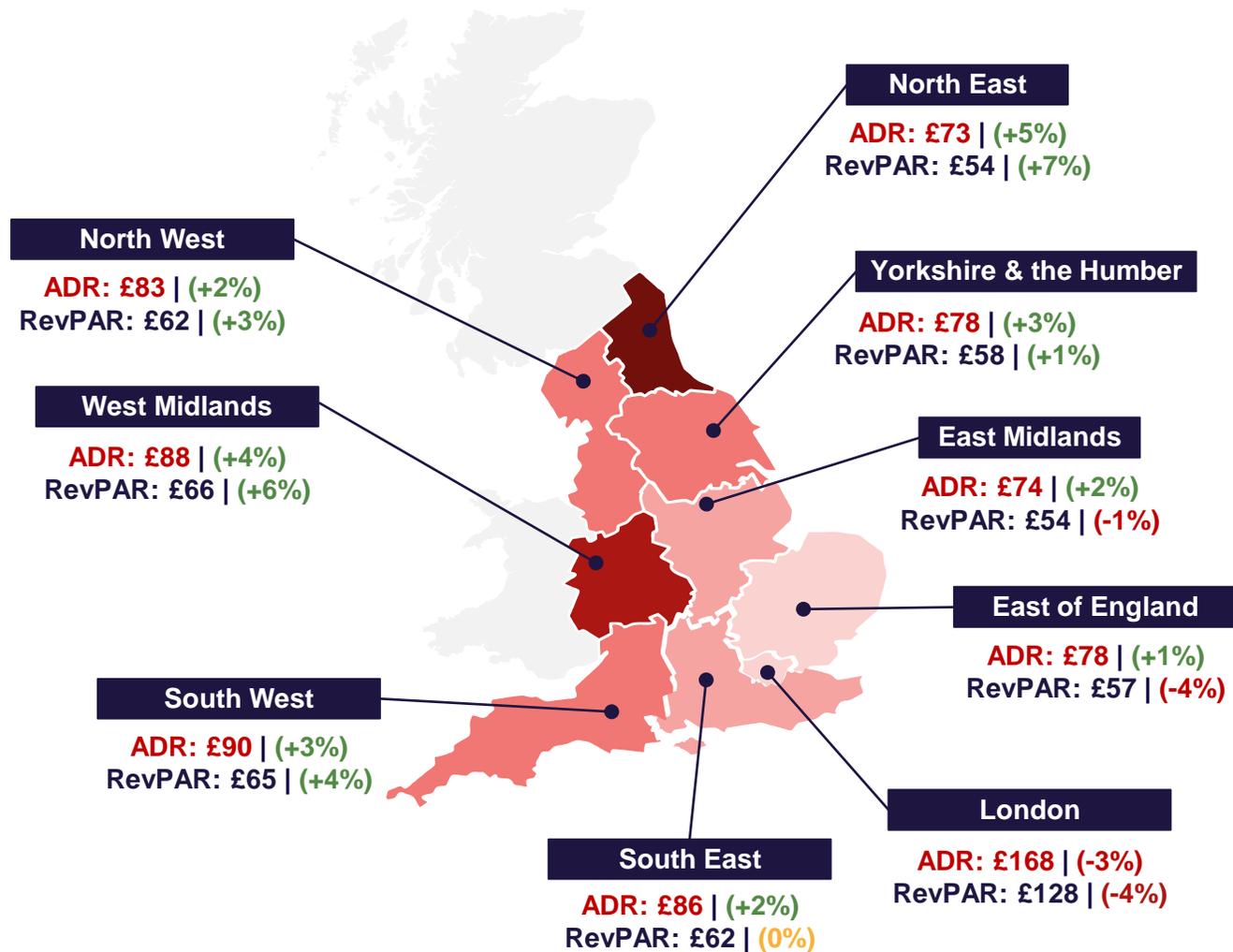
At a glance – March 2024

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 March 2024 was **3.2%**



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

ADR and RevPAR by Region

Data Tables – March 2024

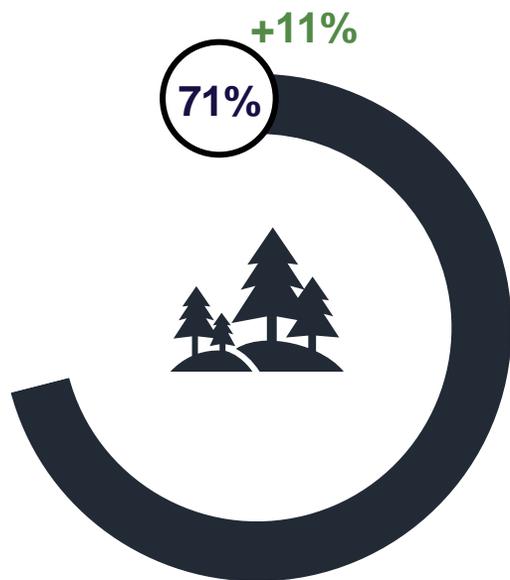
ADR	2019	2021	2022	2023	2024	RevPAR	2019	2021	2022	2023	2024
East England	£64.16	£45.13	£72.81	£76.76	£77.79	East England	£45.93	£19.50	£53.53	£59.80	£57.19
East Midlands	£59.95	£44.55	£67.69	£73.05	£74.45	East Midlands	£42.93	£16.16	£48.97	£54.57	£53.83
Greater London	£37.88	£61.00	£156.47	£173.42	£167.80	Greater London	£112.27	£15.66	£110.57	£133.40	£128.15
Northeast England	£57.96	£44.28	£69.17	£69.49	£72.66	Northeast England	£38.39	£13.41	£49.37	£50.34	£54.08
Northwest England	£69.46	£46.89	£79.68	£81.26	£83.21	Northwest England	£50.54	£13.28	£55.36	£59.60	£61.60
Southeast England	£70.55	£45.60	£78.92	£84.17	£85.62	Southeast England	£50.61	£16.98	£52.57	£61.90	£62.20
Southwest England	£71.73	£45.46	£86.55	£87.59	£90.35	Southwest England	£51.37	£17.84	£61.21	£62.67	£65.11
West Midlands	£69.01	£44.27	£79.65	£84.27	£87.91	West Midlands	£50.38	£12.97	£57.38	£62.83	£66.36
Yorkshire & Humberside	£60.54	£43.15	£72.85	£75.66	£77.74	Yorkshire & Humberside	£43.47	£13.11	£53.49	£57.27	£57.85

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

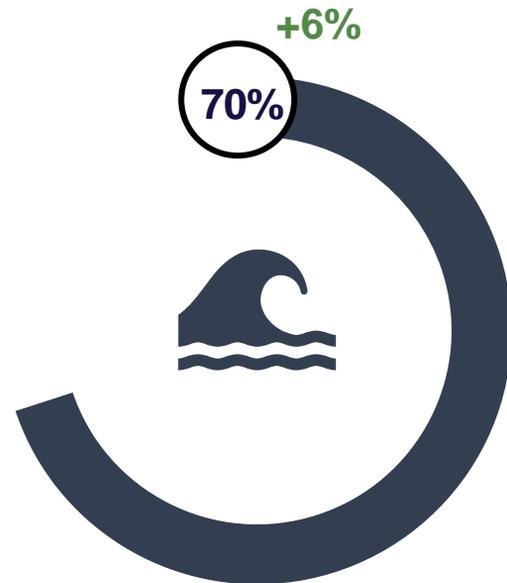


Room Occupancy by Destination Type

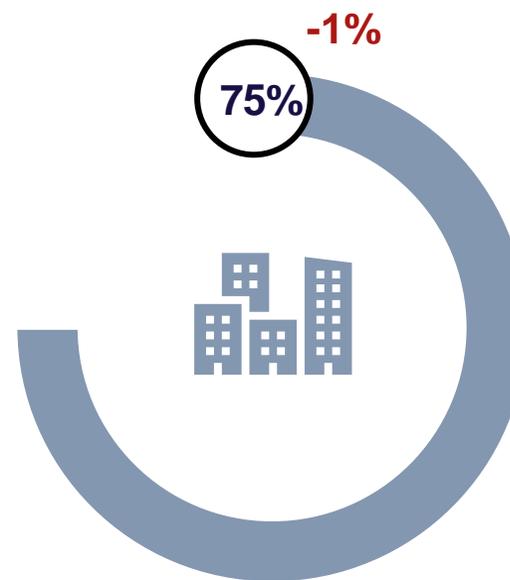
At a glance – March 2024



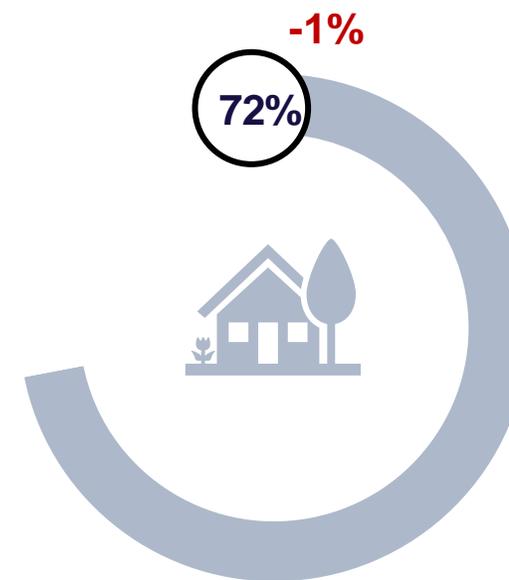
Countryside



Seaside



City / Large Town



Small Town

Room Occupancy by Destination Type

Data Tables – March 2024

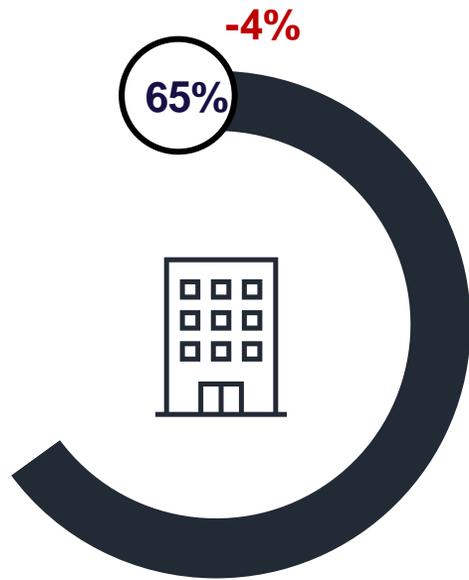
Room Occupancy	2019	2021	2022	2023	2024
City / Large Town	76%	31%	71%	76%	75%
Small Town	70%	38%	69%	73%	72%
Countryside	67%	43%	66%	64%	71%
Seaside	69%	39%	69%	67%	70%

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



Room Occupancy by Number of Rooms

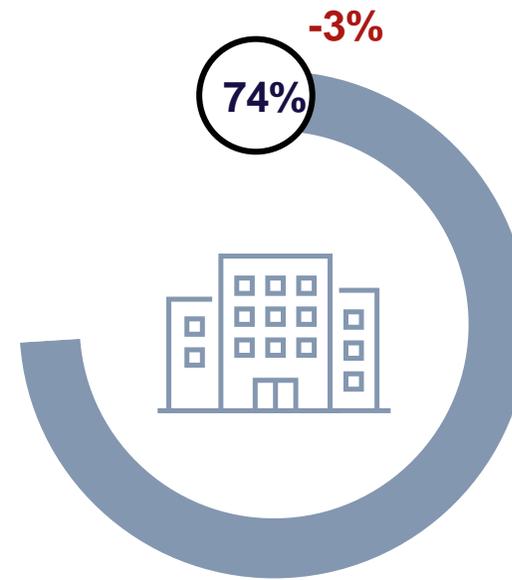
At a glance – March 2024



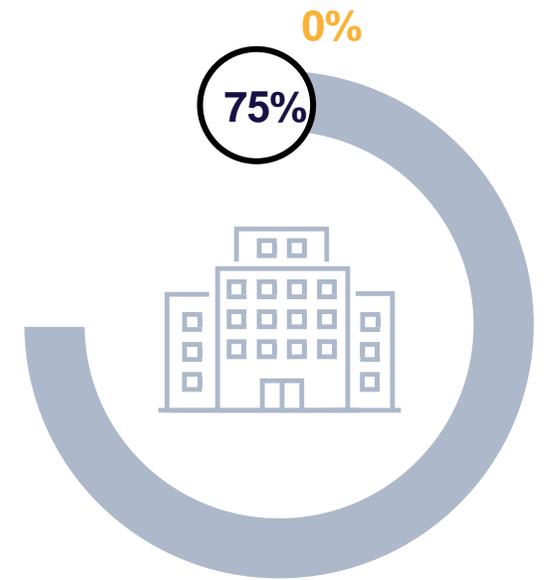
1-25 Rooms



26-50 Rooms



51-100 Rooms



100+ Rooms

Room Occupancy by Number of Rooms

Data Tables – March 2024

Room Occupancy	2019	2021	2022	2023	2024
1 to 25 Rooms	69%	39%	68%	67%	65%
26 to 50 Rooms	71%	45%	70%	71%	69%
51 to 100 Rooms	72%	46%	75%	76%	74%
101+ Rooms	76%	27%	69%	75%	75%

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=3,592)

