

VisitEngland™



England Occupancy Survey

January 2023 Results

Created by



Summary of Results

When comparing January 2023 results with January 2022, **room occupancy** in January 2023 increased from 47% to 65%, whilst **bedspace occupancy** increased from 34% to 45%. In January 2023, **room supply** increased by 1.6% (in relative terms), when compared with January 2022. Meanwhile, **room demand** increased by 39.3% (in relative terms), when compared with January 2022.

RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 76% to £61.27 in January 2023, 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 two regions that recorded the greatest change in room occupancy from last year were Greater London, which increased occupancy from 38% to 65%, followed by West Midlands, which increased occupancy from 47% to 63%. Three regions were tied in third place with year-over-year occupancy gains of 15 percentage points, including Northwest England (49% to 64%), East England (55% to 69%) and Southeast England (49% to 64%).

Looking at hotel performance across **destination types**, City / Large Town hotel room occupancy increased the most from 46% to 65%, followed by Small Town hotel occupancy, which increased from 50% to 63%. Both Seaside hotel occupancy and Countryside hotel occupancy had more modest gains, with Seaside hotel occupancy increasing from 54% to 59% and Countryside hotel occupancy increased from 51% to 55%.

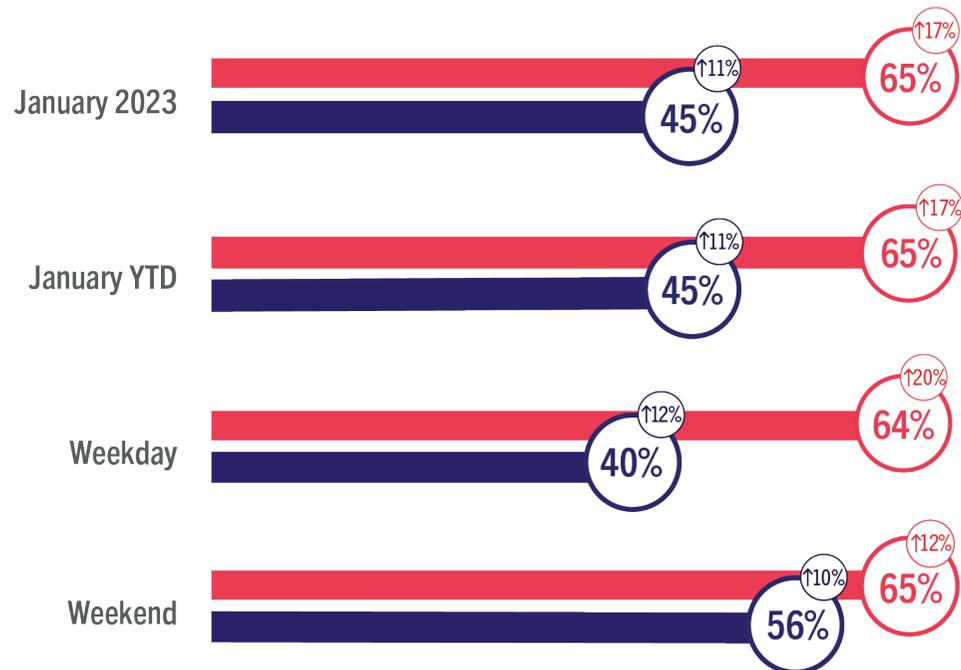
Assessing occupancy rates by **establishment size**, hotels with 101+ rooms increased the most from 43% to 64%, followed by hotels with 51-100 rooms, which increased occupancy from 57% to 68%. Hotels with 26-50 rooms increased occupancy from 52% to 62% and hotels with 1-25 rooms increased occupancy from 49% to 59%.

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 - January 2023

● 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 - January

Room Occupancy

	2019	2021	2022	2023
January	65%	23%	47%	65%
January YTD	65%	23%	47%	65%
Weekday	66%	27%	45%	64%
Weekend	62%	16%	53%	65%

Bedspace Occupancy

	2019	2021	2022	2023
January	45%	16%	34%	45%
January YTD	45%	16%	34%	45%
Weekday	41%	17%	28%	40%
Weekend	54%	14%	46%	56%

Room supply and room demand

Year-on-year relative percentage change	2019	2021	2022	2023
Room Supply	2.0%	-21.8%	26.0%	1.6%
Room Demand	2.0%	-71.8%	155.4%	39.3%

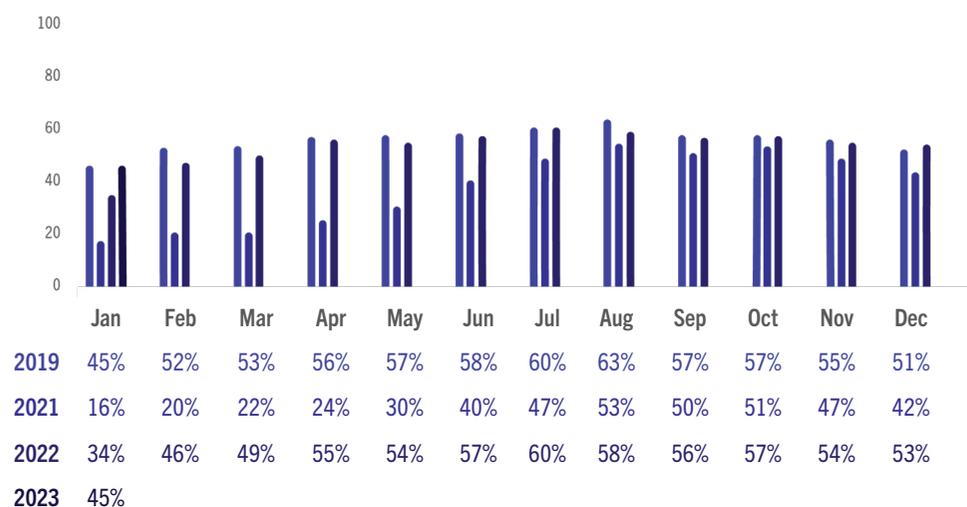


England Room and Bedspace Occupancy

Data Tables



England Room Occupancy by Month



England Bedspace Occupancy by Month

England ADR and RevPAR

At a glance - January 2023

● ADR ● RevPAR ⓘ % Change



*Please note: ADR and RevPAR year-on-year percentage changes are shown in relative terms.

England ADR and RevPAR

Data Tables – January

ADR	2019	2021	2022	2023
January	£85.94	£48.58	£74.12	£94.91
Weekday	£87.93	£47.93	£70.23	£93.98
Weekend	£79.85	£50.88	£82.13	£97.53

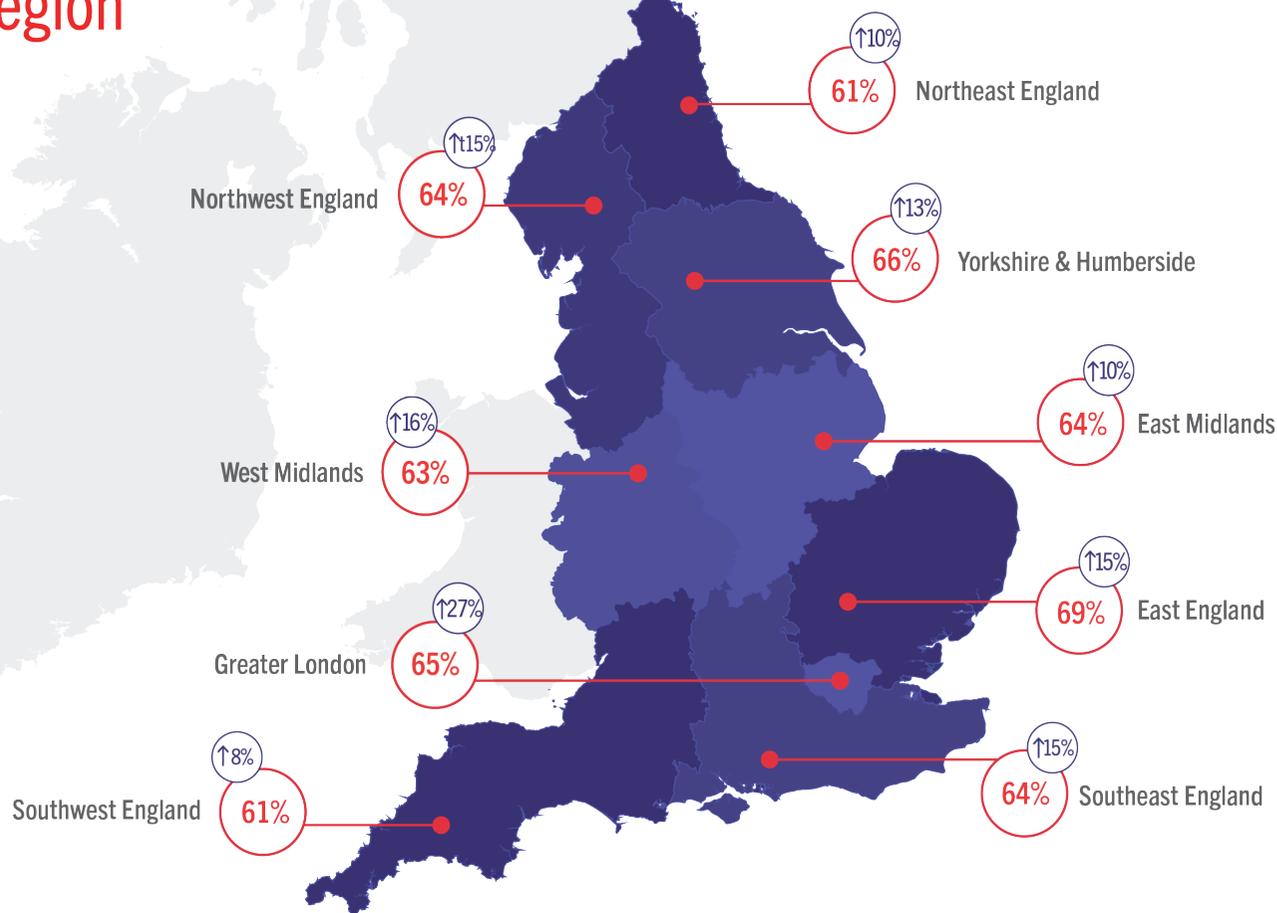
RevPAR	2019	2021	2022	2023
January	£55.75	£11.29	£34.91	£61.27
Weekday	£57.95	£12.80	£31.34	£60.38
Weekend	£49.42	£8.12	£43.63	£63.82



Room Occupancy By Region

At a glance - January 2023

*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 - January

Room Occupancy

	2019	2021	2022	2023
East England	63%	30%	55%	69%
East Midlands	61%	28%	54%	64%
Greater London	72%	19%	38%	65%
Northeast England	59%	23%	51%	61%
Northwest England	62%	21%	49%	64%
Southeast England	63%	27%	49%	64%
Southwest England	60%	27%	53%	61%
West Midlands	64%	20%	47%	63%
Yorkshire & Humberside	60%	22%	53%	66%

Bedspace Occupancy

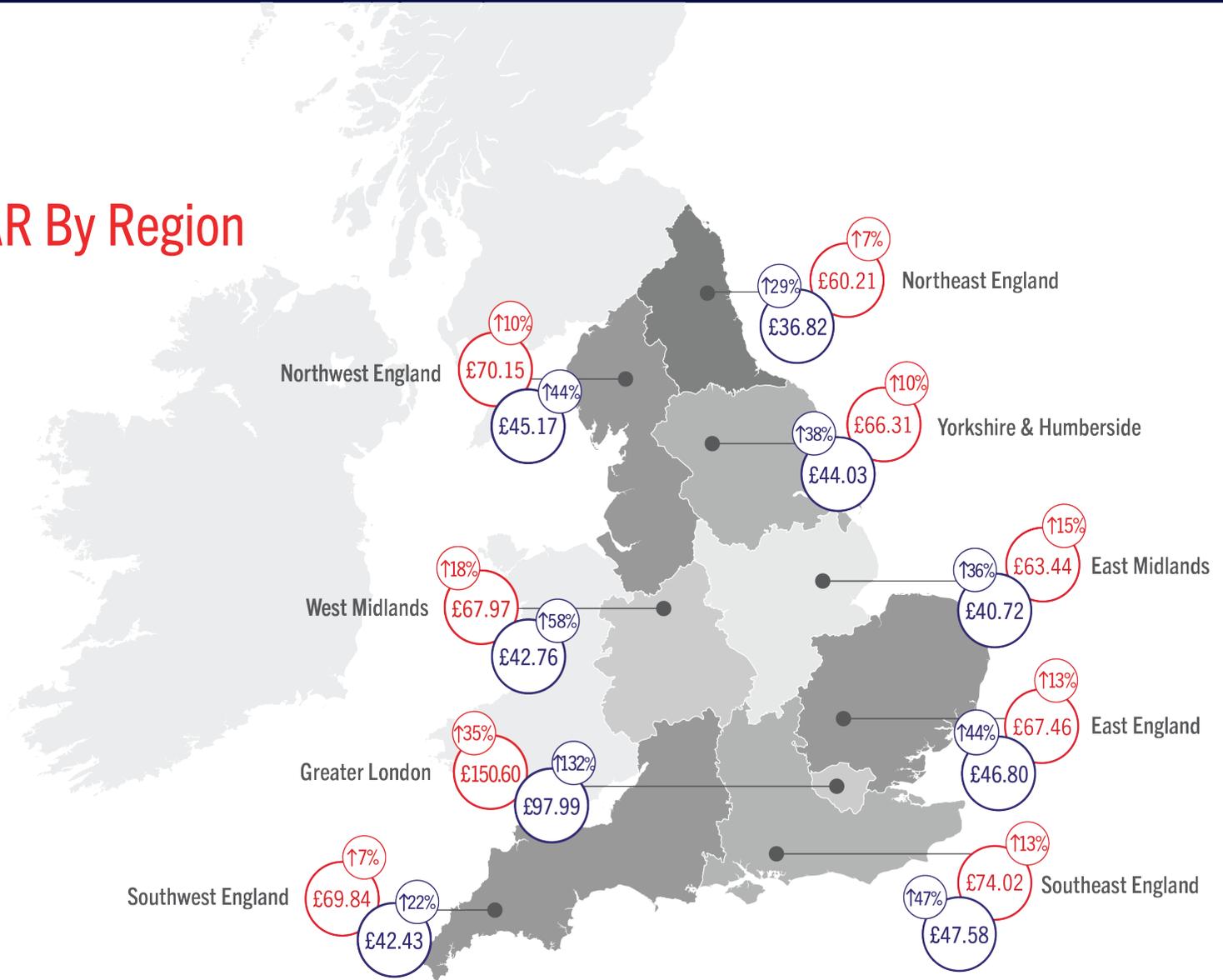
	2019	2021	2022	2023
East England	44%	21%	39%	48%
East Midlands	42%	20%	38%	44%
Greater London	51%	14%	27%	46%
Northeast England	41%	16%	36%	43%
Northwest England	43%	15%	34%	45%
Southeast England	44%	19%	35%	45%
Southwest England	41%	19%	37%	42%
West Midlands	43%	14%	32%	42%
Yorkshire & Humberside	43%	15%	38%	47%

ADR and RevPAR By Region

At a glance - January 2023

*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 - January

ADR

	2019	2021	2022	2023
East England	£61.59	£44.15	£59.56	£67.46
East Midlands	£57.51	£44.46	£55.14	£63.44
Greater London	£130.77	£62.24	£111.21	£150.60
Northeast England	£54.58	£43.78	£56.06	£60.21
Northwest England	£62.56	£45.90	£64.03	£70.15
Southeast England	£67.01	£46.22	£65.63	£74.02
Southwest England	£62.02	£43.96	£65.22	£69.84
West Midlands	£63.48	£42.20	£57.70	£67.97
Yorkshire & Humberside	£56.64	£42.26	£60.26	£66.31

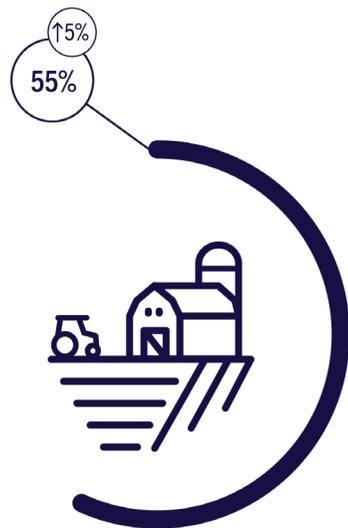
RevPAR

	2019	2021	2022	2023
East England	£38.72	£13.34	£32.58	£46.80
East Midlands	£34.88	£12.54	£29.93	£40.72
Greater London	£93.87	£11.95	£42.17	£97.99
Northeast England	£32.01	£10.02	£28.63	£36.82
Northwest England	£38.50	£9.74	£31.30	£45.17
Southeast England	£41.89	£12.31	£32.48	£47.58
Southwest England	£36.99	£11.76	£34.65	£42.43
West Midlands	£40.64	£8.49	£27.11	£42.76
Yorkshire & Humberside	£34.13	£9.14	£31.98	£44.03



Room Occupancy By Destination Type

At a glance - January 2023



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 - January

Room Occupancy

	2019	2021	2022	2023
City / Large Town	66%	23%	46%	65%
Small Town	61%	24%	50%	63%
Countryside	59%	22%	51%	55%
Seaside	57%	26%	54%	59%

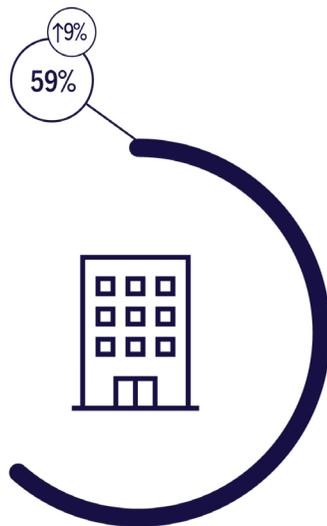
Bedspace Occupancy

	2019	2021	2022	2023
City / Large Town	46%	16%	32%	45%
Small Town	44%	17%	36%	45%
Countryside	40%	15%	34%	37%
Seaside	42%	19%	40%	43%



Room Occupancy By Number of Rooms

At a glance - January 2023



*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 - January

Room Occupancy

	2019	2021	2022	2023
1 to 25 Rooms	56%	35%	49%	59%
26 to 50 Rooms	60%	30%	52%	62%
51 to 100 Rooms	63%	34%	57%	68%
101+ Rooms	66%	19%	43%	64%

Bedspace Occupancy

	2019	2021	2022	2023
1 to 25 Rooms	40%	25%	35%	42%
26 to 50 Rooms	43%	22%	37%	44%
51 to 100 Rooms	46%	25%	42%	49%
101+ Rooms	46%	13%	30%	44%

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=3,486).

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:

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