

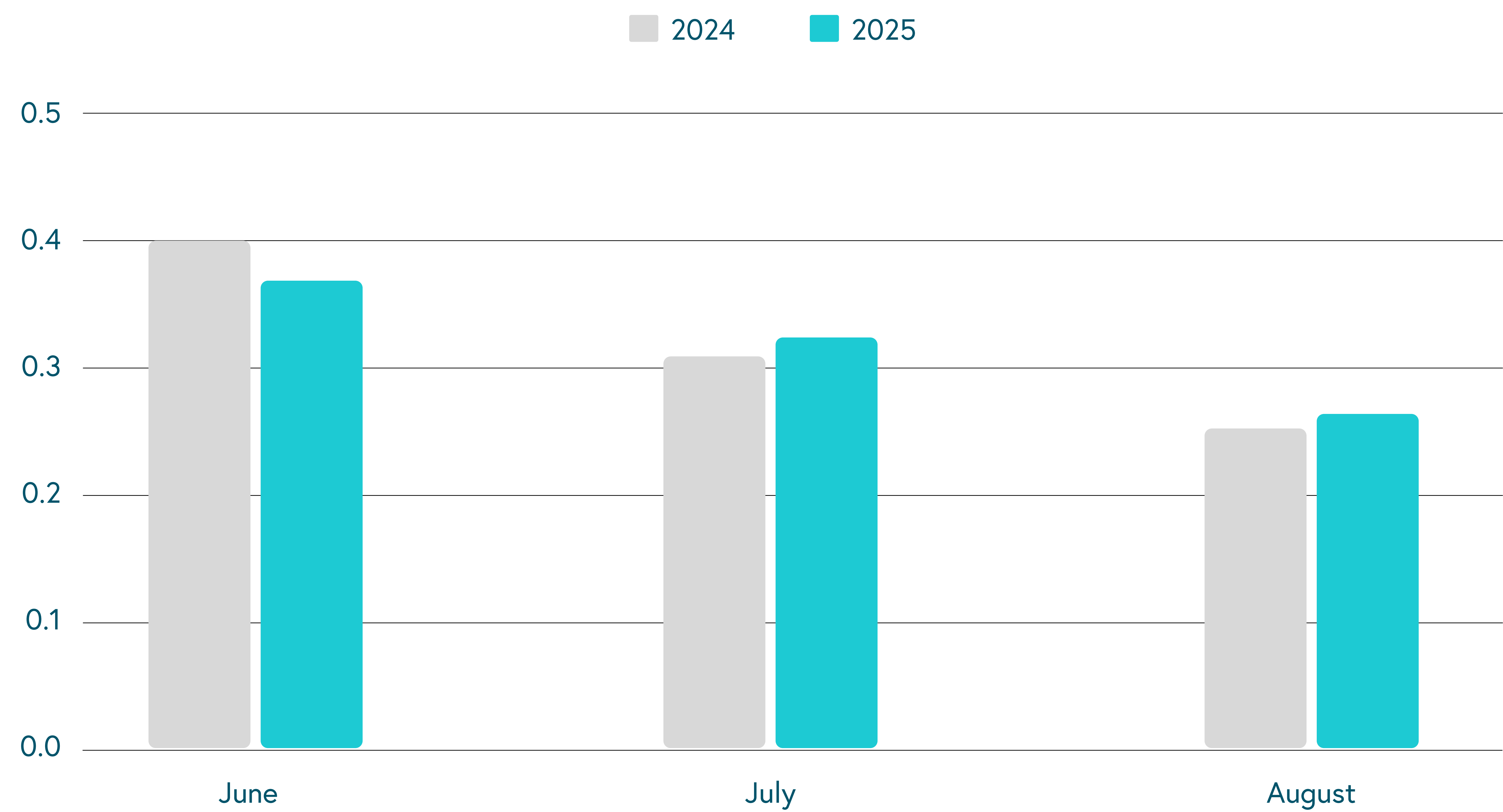
Trends Shaping the Second Half of 2025 in the UK



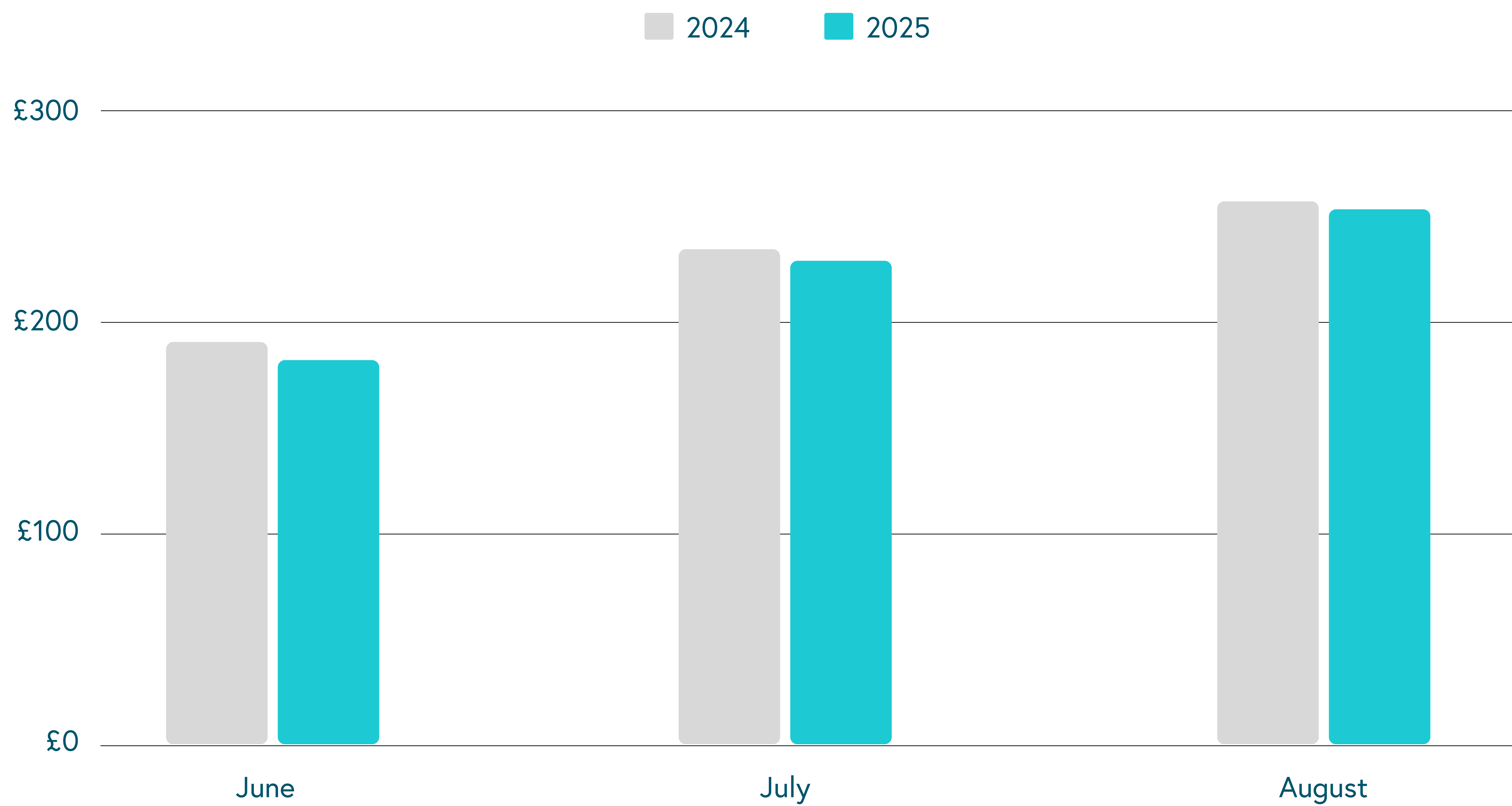
Summer travel in the UK is heating up, but guest behaviour is shifting in subtle ways. From shorter stays to tighter booking windows, understanding these trends is key to maximising revenue. Here's what the latest data reveals.

Summer Bookings

1. Occupancy Rates are Pacing 3% Ahead



2. Average Daily Rates are Pacing 1.3% Behind



Guest Booking Behaviour

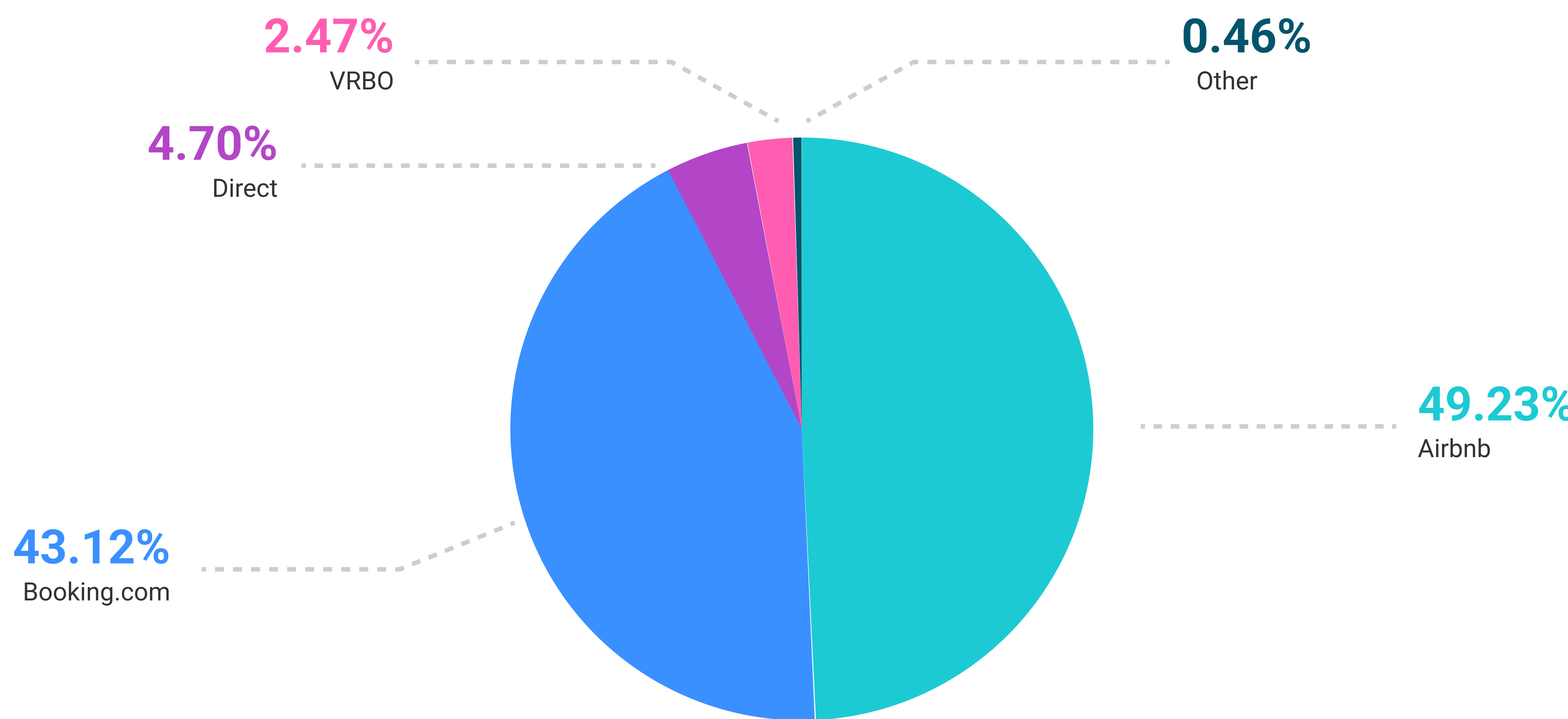
Length of Stay

4 days, -2.4% YoY

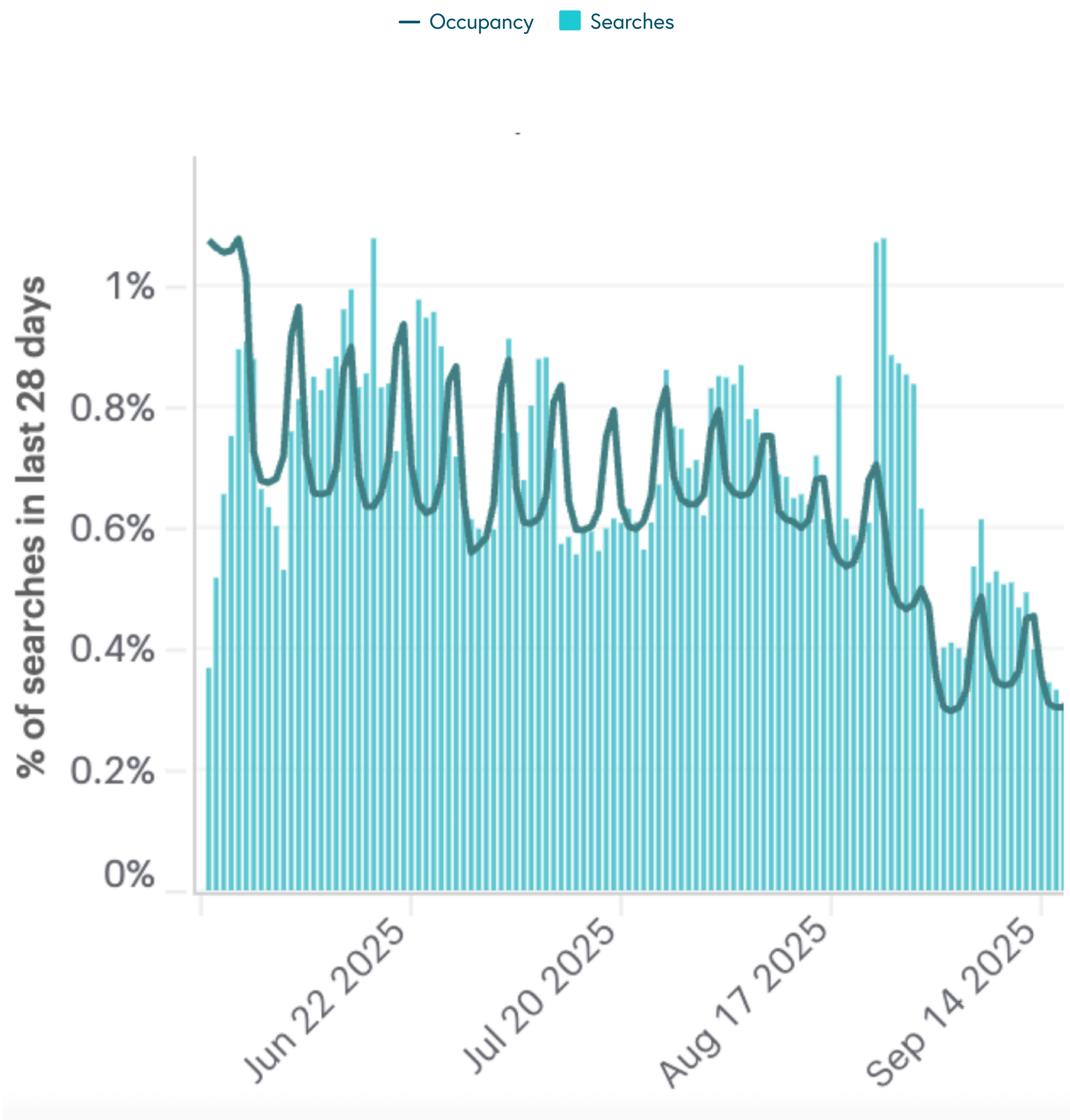
Booking Windows

31 days, -9% YoY

Channel Distribution



Searches by Market



Summer planning is in full effect: 68% of all searches were for stay dates between June and August 2025.



Key Takeaways

Occupancy Is Up, But Guests Are Booking Closer to Arrival

UK summer occupancy rates are pacing 3% ahead of last year, signalling strong demand. But with booking windows down 9% year-over-year to just 31 days, guests are waiting longer to book—meaning pricing agility closer to check-in will be key.

Rates and Stay Lengths Are Both Down—Value Matters

Average daily rates are pacing 1.3% behind, and the average length of stay has dropped by 2.4% year-over-year to 4 days. Travellers may be feeling the squeeze, so competitive pricing and added value could help capture bookings without sacrificing too much revenue.

Summer Hosting Tips

- **Use Flexible, Demand-Responsive Pricing:** Adjust rates dynamically to fill gaps—don't be afraid to drop prices closer to stay dates if demand is soft.
- **Cater to Last-Minute Bookers:** Align your minimum stay requirements to your market and highlight flexible cancellation policies to capture the increasing amount of spontaneous travellers.
- **Keep an Eye on Market Trends:** Monitor local performance data like occupancy rates, average daily rates, and booking pace. Comparing your results to market benchmarks helps you adjust your strategies more effectively, make decisions, and quickly spot opportunities or risk periods.

