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UK Market Trends
PASC Members Webinar
2nd July 2025

Prepared by Key Data Dashboard™ | © KEY DATA DASHBOARD

Agenda

- UK: Performance
  - 2025 Pacing
    - Occupancy
    - Rates
    - Revenue
    - Length of Stay
    - Booking Windows
  - Peak summer
- Takeaways

Key Data: Who Are We?

Created by Property Managers **for** Property Managers

Business Intelligence tools and Benchmarking insights for professional property managers allowing them to make decisions using *real* data.

- **Direct Integrations** with Property Management Systems and Property Managers globally;
  - **Daily reservation** data from over **13,000** professional PMCs.
  - A comprehensive **data coop.**
- **50m+** API calls per day, tracking **Airbnb** and **vrbo**
  - Scraped data is trained against our direct source data
- Data is aggregated and anonymised for **market benchmarking**
  - Dashboards, API, Flat files

All data shared today is from our directly integrated property managers

Proudly partnered with:

PASC
www.pascuk.co.uk

ASSC

STAA
Short Term Accommodation Association

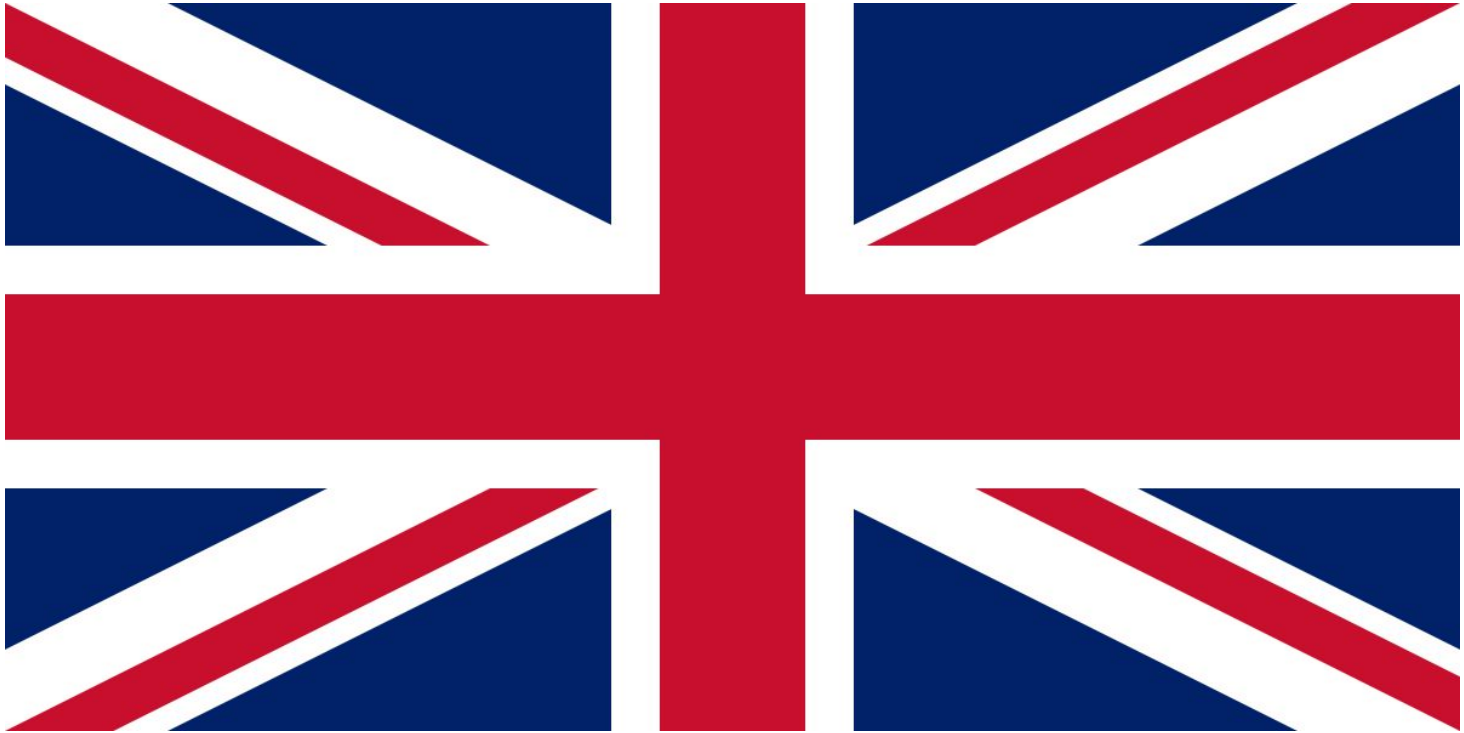
VRMA
VACATION RENTAL MANAGEMENT ASSOCIATION

Splm
Syndicat des Professionnels de la Location Meublée

stama
GREECE SHORT-TERM ACCOMMODATION MANAGERS ASSOCIATION

astra

UK Performance
2025 Pacing



Confirmed direct bookings@31st May /
Summer peak @1st July

United Kingdom Paid Occupancy

Direct data for reservations made by May 31

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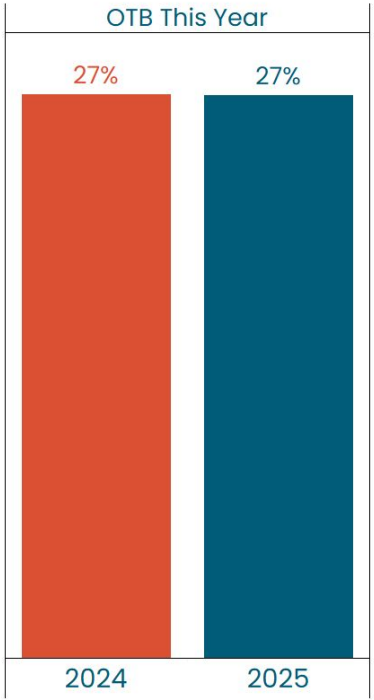
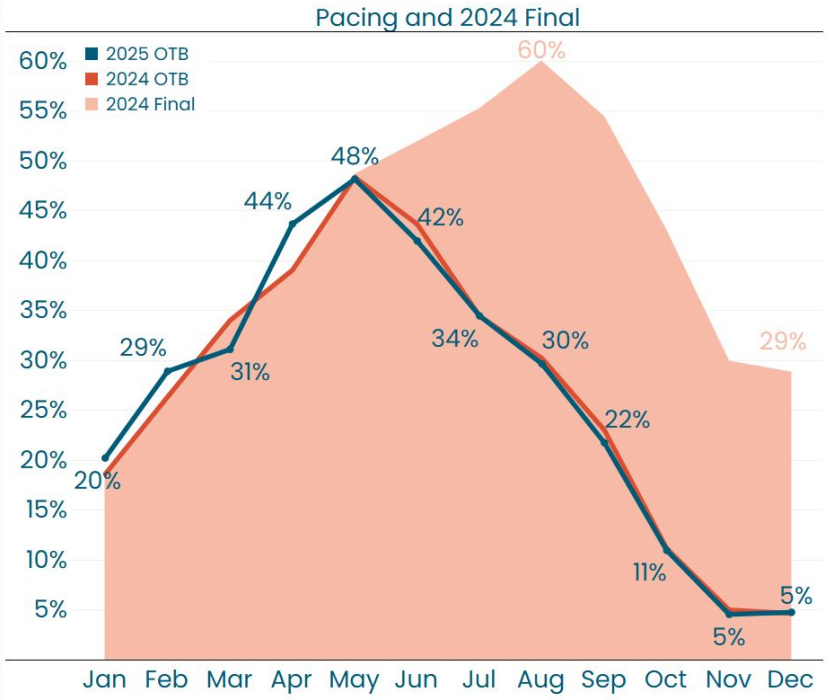
Annual Totals

OTB This Year



Monthly Totals

Pacing and 2024 Final



Arrival Date

2025 guest paid occupancy % is pacing flat on 2024 levels

- 2024 finished down on 2023
- January – Feb finished quite flat but the Easter shift means we see March and April shift.
- **May ended up flat but June is looking a little softer**
- Peak summer and the rest of the year is pacing closely to 2024

United Kingdom Average Daily Rate

Direct data for reservations made by May 31

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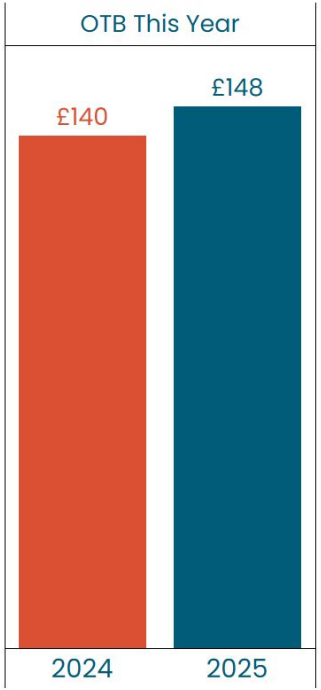
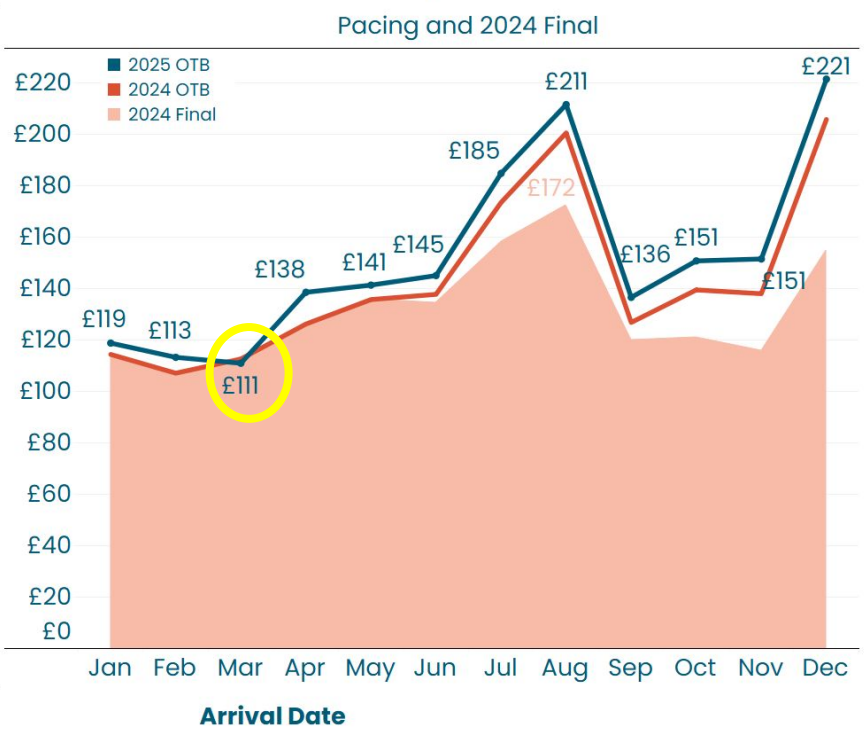
Annual Totals



Monthly Totals



2025 ADR pacing higher than 2024

- 2024 finished slightly up on 2023
- January – Feb finished similar to 2024, March rates dropped as we saw Easter shift and occupancy drop
- April commended higher rates (Easter demand)
- **Peak summer** rates pacing higher as are rates to the end of year
- **ADRs will come down as we move through the booking windows**

United Kingdom RevPAR

Direct data for reservations made by May 31

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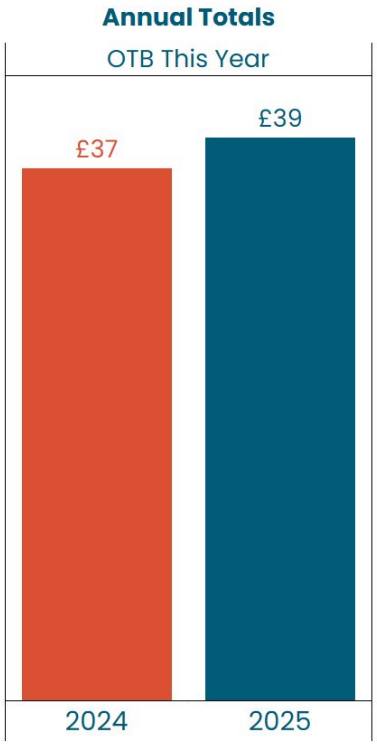

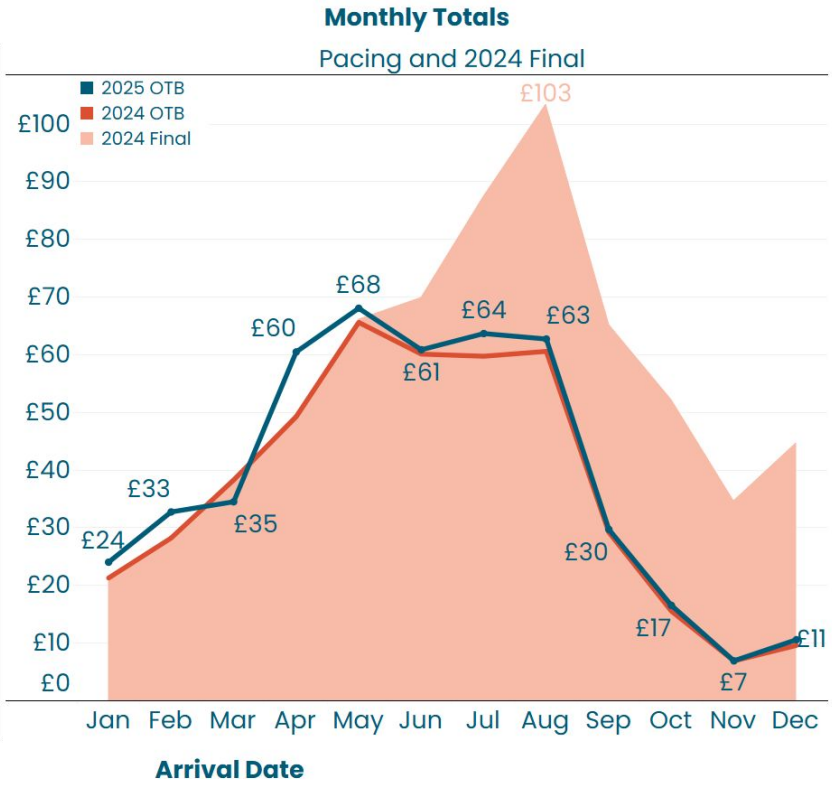

2025 RevPAR pacing a little higher than 2024 levels

- Total 2024 finished **flat** to 2023
- March and April are seeing a swap due the shift in Easter
- Softer occupancy in June is keeping RevPAR flat
- **Peak summer** is pacing up due to those higher rates.
- Rest of year pacing flat
- **Revenue** reflects the balance of occupancy and rates

United Kingdom Average Stay Length

Direct data for reservations made by May 31

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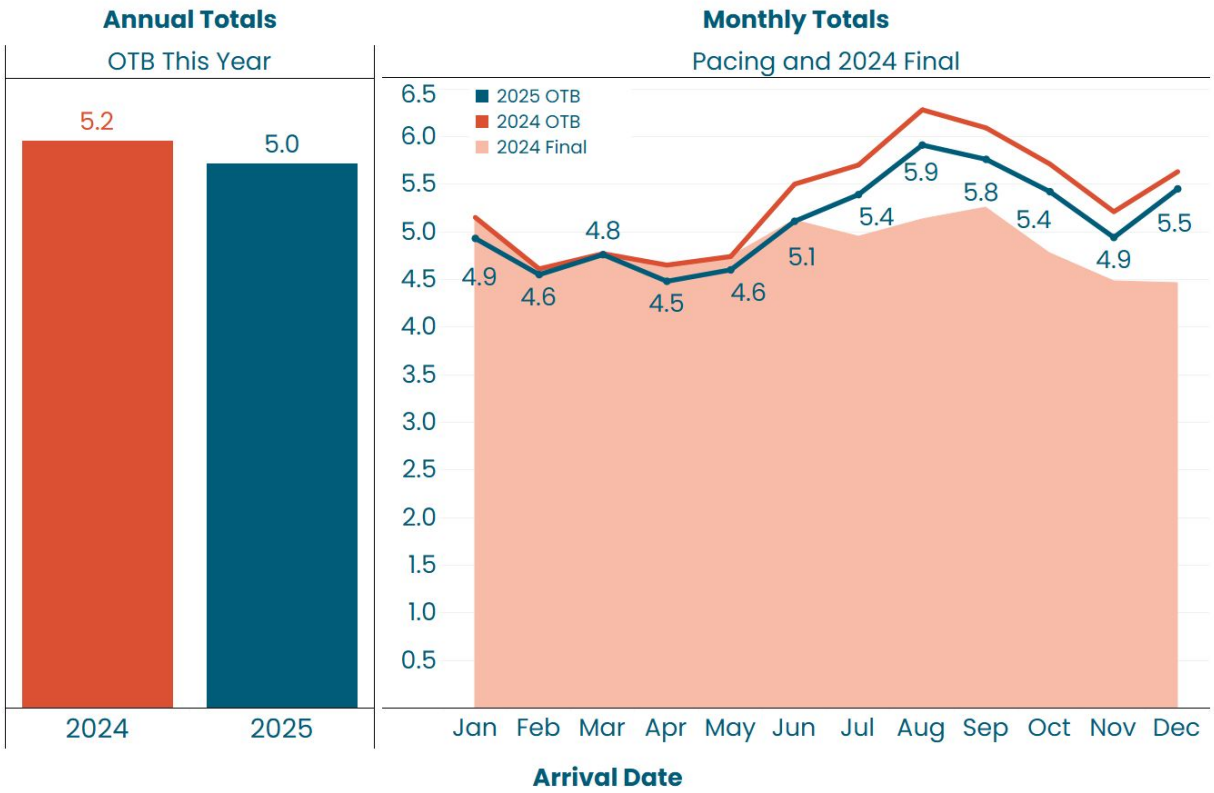

2025 stay length pacing slightly shorter than 2024

- Total 2024 finished shorter than 2023 and **pacing down**
- Seeing shorter length of stay pacing for the rest of the year
- Gap night strategy
- Stay lengths will shorten as you move through the year.
- **Guests staying longer tend to book further out** while guests looking for a short stay wait until closer to book.

UK Average Booking Window

Direct data for reservations made by May 31

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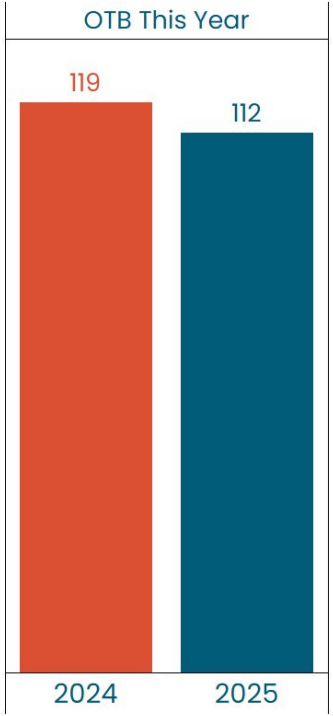
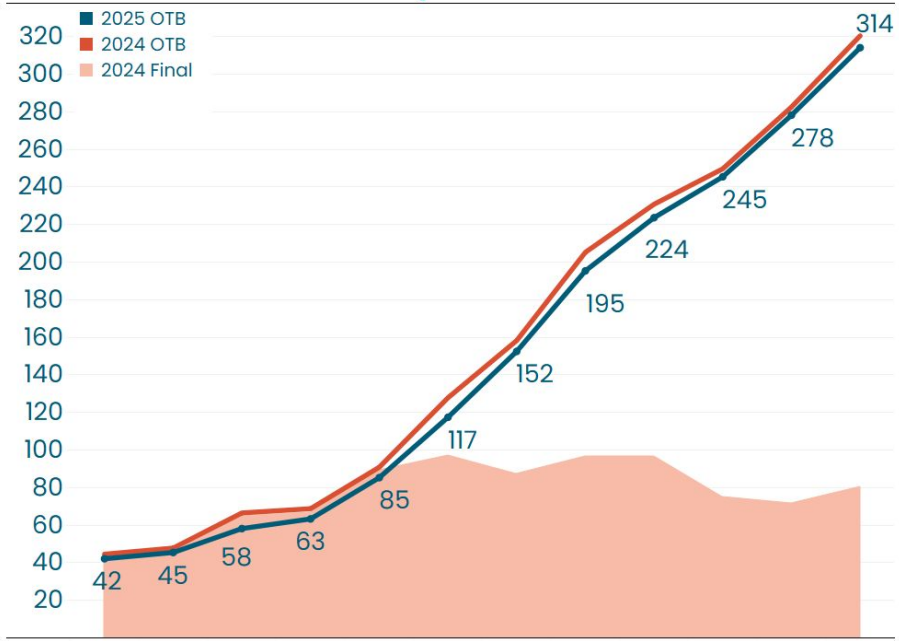
Annual Totals

OTB This Year



Monthly Totals

Pacing and 2024 Final



Arrival Date

2025 booking window pacing shorter by a week than 2024

- Total 2024 finished a day longer than 2023
- Currently pacing a **week shorter** in for 2025 arrivals - early summer
- V shape in bookings as the later bookings are coming late
- Be prepared with your strategies well in advance so you don't miss the early booking guests

United Kingdom 2025 YTD By Booking Window

Direct data for arrivals January 1 - May 31

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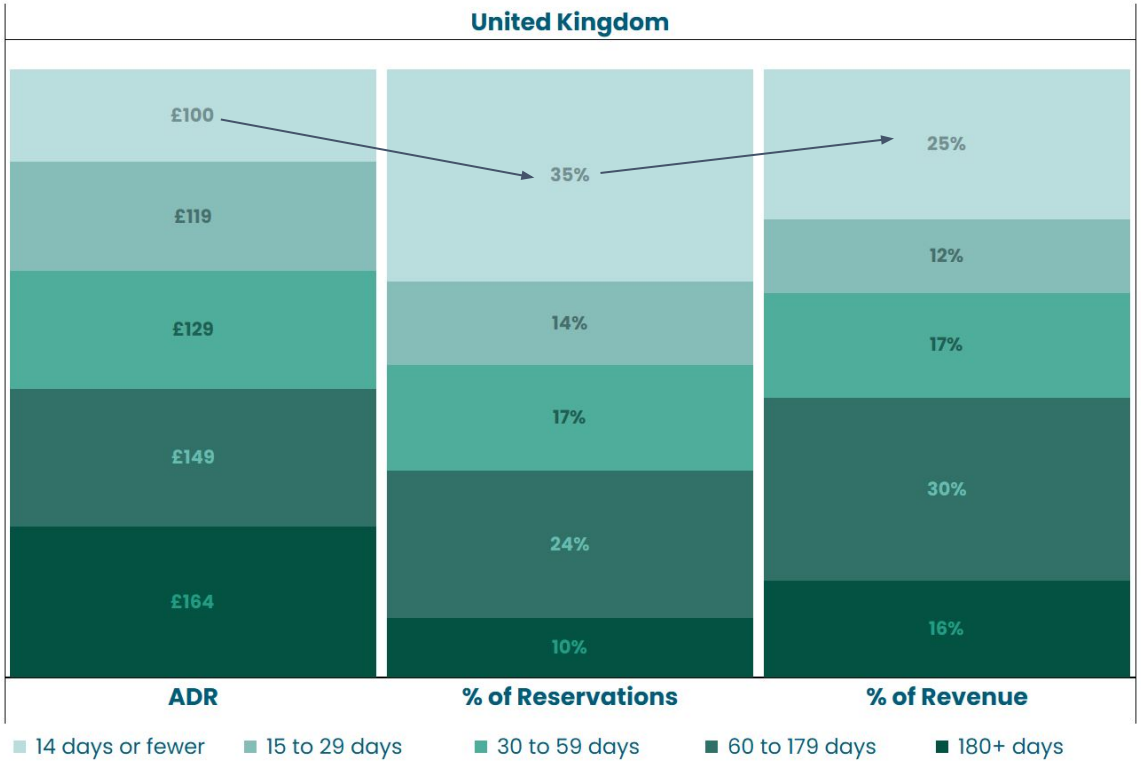

YTD: 1 January - May 31

We can see a more exasperated view for arrivals in the first 5 months

- **35% of reservations** booking within **14 days** at the lower ADR of £100
- Guests booking **60+ days** in advance tend to book higher ADRs and longer lengths of stays driving more revenue
- Reservations booking inside of **14 days tend to be at lower ADR** as rates are pressured to capture needed occupancy
- **Impact on revenue when we have a late market**

United Kingdom Summer Trends

Direct data for reservations made by July 1st

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ADR		Paid Occ. %		RevPAR	
£201	2025	37.0%	2025	£75	2025
	6.3 %		-4.6 %		1.5 %
£189	2024	38.8%	2024	£73	2024
None		None		None	

Avg. Length of Stay		Avg. Booking Window		Avg. Stay Value	
5.6	2025	153	2025	£1,111	2025
	-4.9 %		-2.3 %		2.2 %
5.9	2024	156	2024	£1,088	2024
None		None		None	

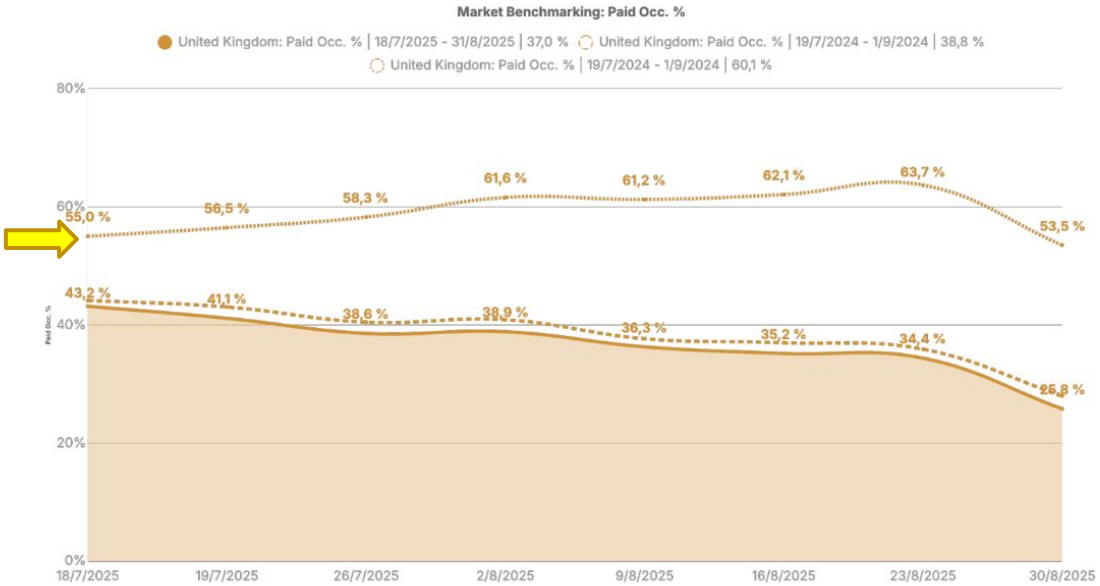
RevPAR for peak summer arrivals is consistently up on 2024

- **Guest paid occupancy softer**
- **Higher rates pushing RevPAR up**
- **Length of stay 0.3 days shorter**

Peak Summer: 18 July - 31 August 2025 V 19 July to 1st September 2024

United Kingdom Summer Trends

Direct data for reservations made by July 1st



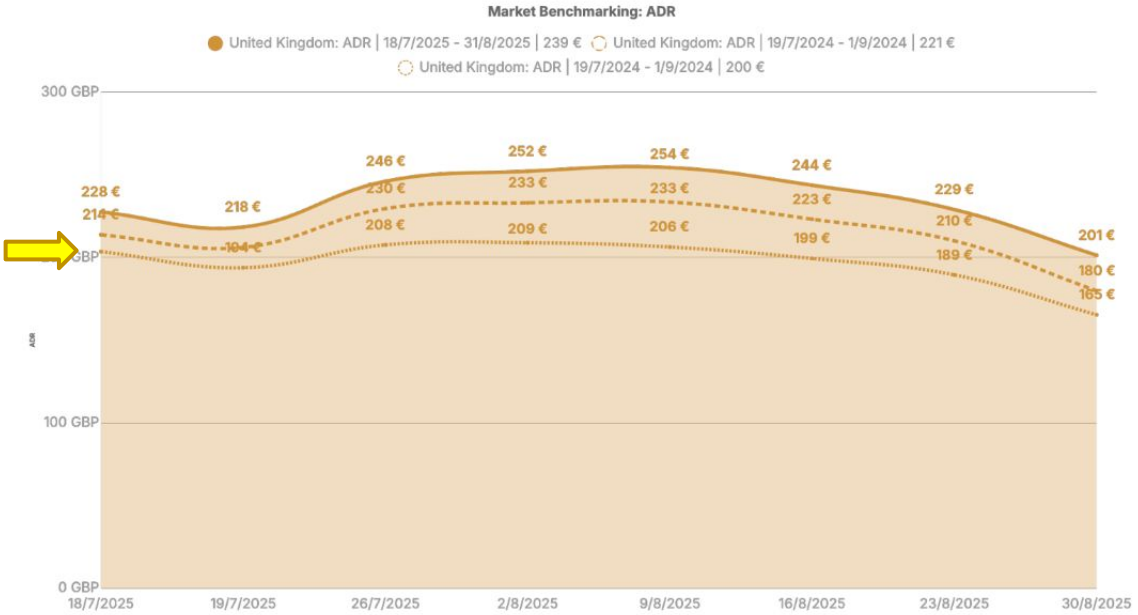
Guest paid occupancy softer than 2024 for all peak summer weeks

- Slightly softer pacing with 1st week of peak almost flat
- 2024 summer was littered with distractions
  - Election
  - Euros
  - Olympics
  - The weather wasn't kind
- Last full week of August had the highest occupancy last summer

Peak Summer: 18 July -31 August 2025 V 19 July-1st September 2024 @ 9th June

United Kingdom Summer Trends

Direct data for reservations made by July 1st



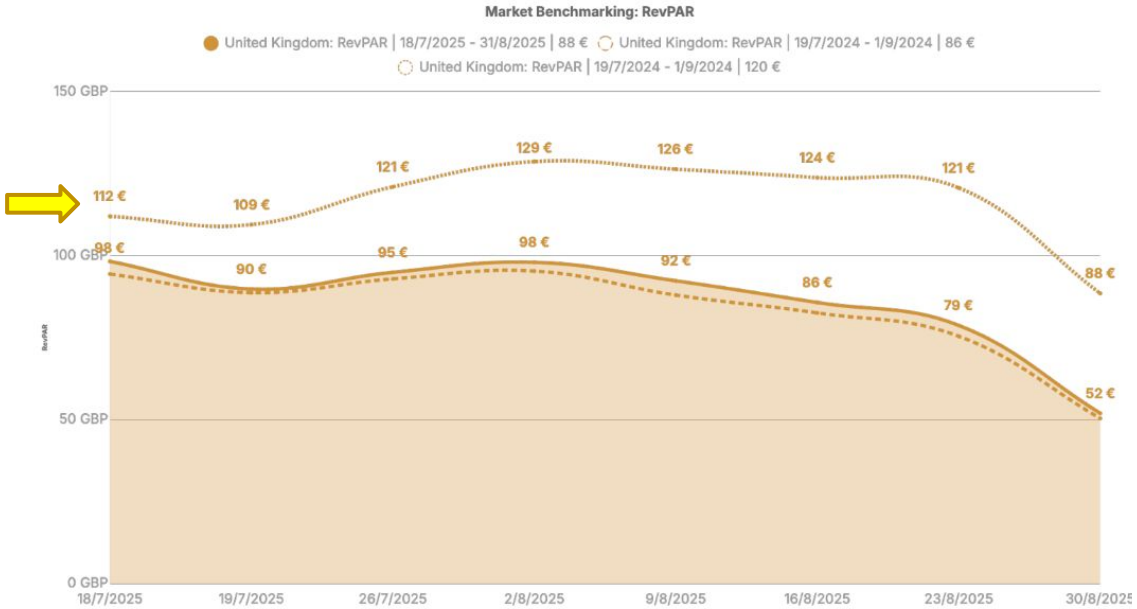
ADR pacing higher than 2024 for all peak summer weeks

- **Similar ADR increase of around £12**
- **We can see where the rates ended up (-£25 ADR from pacing position, on average in 2024)**

Peak Summer: 18 July -31 August 2025 V 19 July-1st September 2024 @ 9th June

United Kingdom Summer Trends

Direct data for reservations made by 1st July



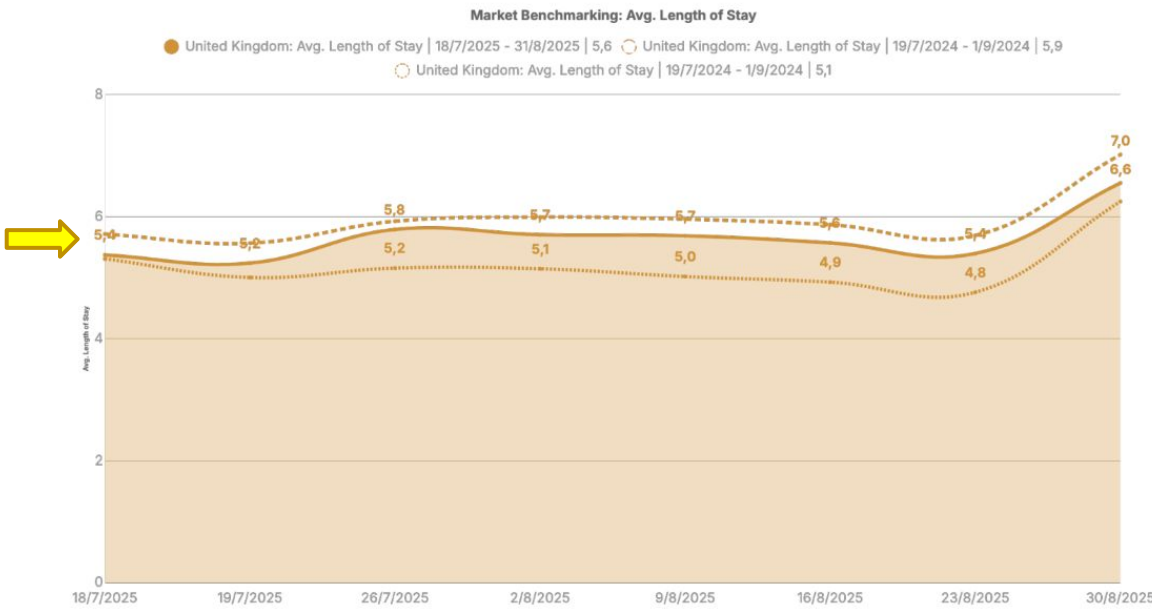
RevPAR pacing higher than 2024 for all peak summer weeks

- An increase of £2 or £3 on 2024
- Pushed by the higher prices
- Highest RevPAR the 1st week in August in 2024

Peak Summer: 18 July -31 August 2025 V 19 July-1st September 2024 @ 9th June

United Kingdom Summer Trends

Direct data for reservations made by 1st July



Average Length of Stay contracting for all peak arrival weeks

- Beginning and end of peak summer pacing .4 days shorter
- Rest of weeks pacing 0.2 or 0.3 days shorter
- See where we finished up last summer as length of stay contracts as you get closer to arrival
  - 0.5/0.6 days shorter than pacing

Peak Summer: 18 July -31 August 2025 V 19 July-1st September 2024 @ 9th June

United Kingdom 2025 YTD by Booking Source

Direct data for arrivals January 1 - May 31

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YTD: 1 January - 31 May

airbnb Booking.com Vrbo

Optimise the strengths of each booking source to attract different travellers

- **Airbnb and Booking.com are the most significant booking channels in the UK** and have **shorter booking windows** that can help fill occupancy close in
- **VRBO has higher ADRs** which is contributing to the revenue performance.
- OTA prices 'may' be inflated for distribution / longer LOS
- **Understand your portfolio / geo for channel optimisation**

Key Takeaways
2025

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- Continued trends that we saw in 2024
  - **Softer occupancy**
  - **Rates** pushed **higher**
  - Pretty **flat revPAR**

- **Stay lengths** and **booking windows** are getting **shorter**

- The dominant **OTAs** are delivering guests who are booking later and staying shorter durations

- Summer 2024 was riddled with distractions and the weather wasn't kind

- We need to be prepared and control what we can
  - Use real-time data to identify areas of opportunity

- **James Weatherby - demo of Key Data Dashboard**

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Thank You!

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KeyDataDashboard.com

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Regional

2025 Year-to-Date Paid Occupancy

Direct data for arrivals January 1 - May 31

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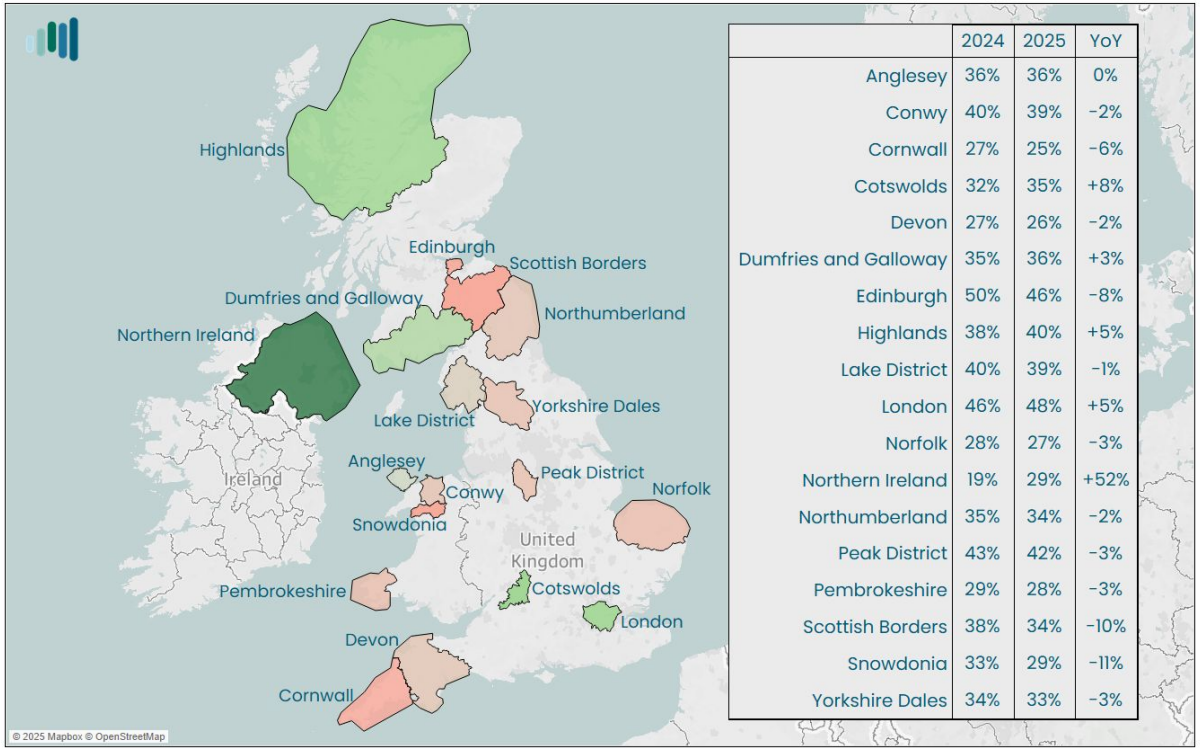
Paid Occupancy YoY



	2024	2025	YoY
Anglesey	36%	36%	0%
Conwy	40%	39%	-2%
Cornwall	27%	25%	-6%
Cotswolds	32%	35%	+8%
Devon	27%	26%	-2%
Dumfries and Galloway	35%	36%	+3%
Edinburgh	50%	46%	-8%
Highlands	38%	40%	+5%
Lake District	40%	39%	-1%
London	46%	48%	+5%
Norfolk	28%	27%	-3%
Northern Ireland	19%	29%	+52%
Northumberland	35%	34%	-2%
Peak District	43%	42%	-3%
Pembrokeshire	29%	28%	-3%
Scottish Borders	38%	34%	-10%
Snowdonia	33%	29%	-11%
Yorkshire Dales	34%	33%	-3%

- UK, pacing flat overall
- Many regions are showing year on year **decreases, Snowdonia** and **Scottish Borders** in particular
- **London, Cotswolds, Highlands and Dumfries and Galloway** - handful of regions with paid occupancy growth
- **Northern Ireland** shows strongest improvement from very low 2024 base

2025 Year-to-Date Average Daily Rate

Direct data for arrivals January 1 - May 31

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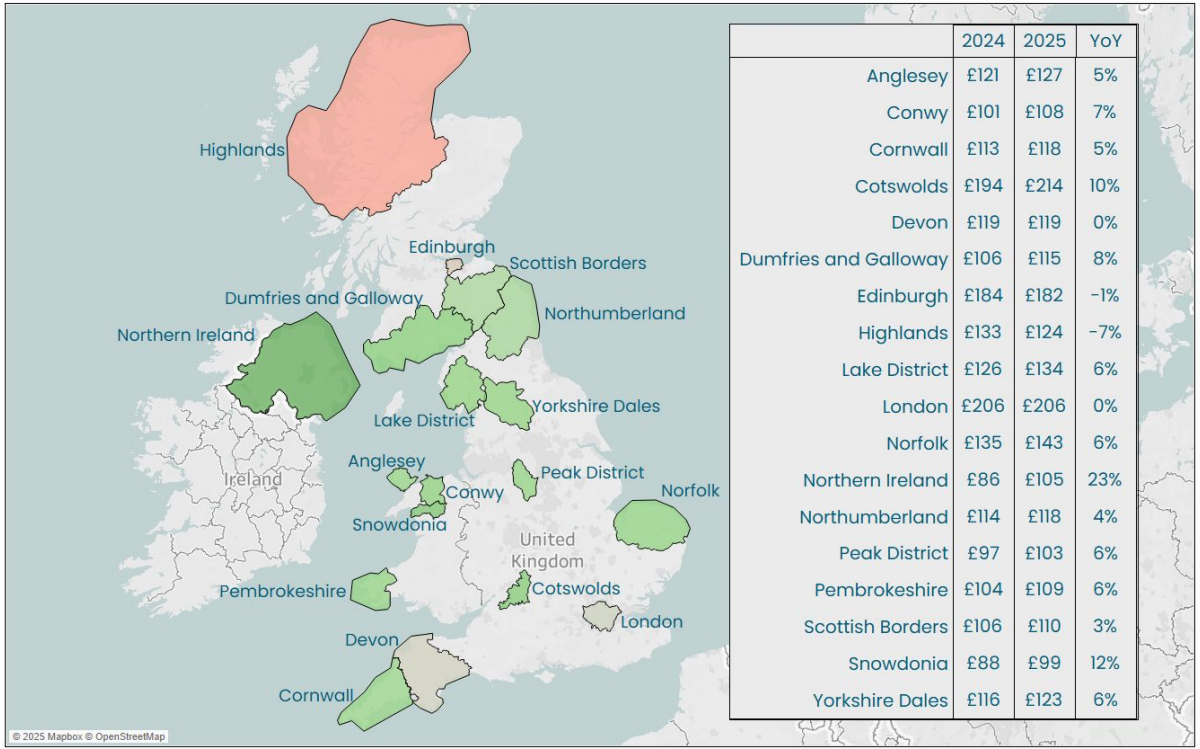
Average Daily Rate YoY



	2024	2025	YoY
Anglesey	£121	£127	5%
Conwy	£101	£108	7%
Cornwall	£113	£118	5%
Cotswolds	£194	£214	10%
Devon	£119	£119	0%
Dumfries and Galloway	£106	£115	8%
Edinburgh	£184	£182	-1%
Highlands	£133	£124	-7%
Lake District	£126	£134	6%
London	£206	£206	0%
Norfolk	£135	£143	6%
Northern Ireland	£86	£105	23%
Northumberland	£114	£118	4%
Peak District	£97	£103	6%
Pembrokeshire	£104	£109	6%
Scottish Borders	£106	£110	3%
Snowdonia	£88	£99	12%
Yorkshire Dales	£116	£123	6%

- **UK**, +£8 ADR pacing overall
- **Strong rate performance** Multiple regions showing healthy increases
- **Northern Ireland, Snowdonia and Cotswolds** all pushing double digit rate growth pacing
- Only the **Highlands** and Edinburgh regions shows rate decline

2025 Year-to-Date GPO and ADR - correlation

Direct data for arrivals January 1 - 31st May

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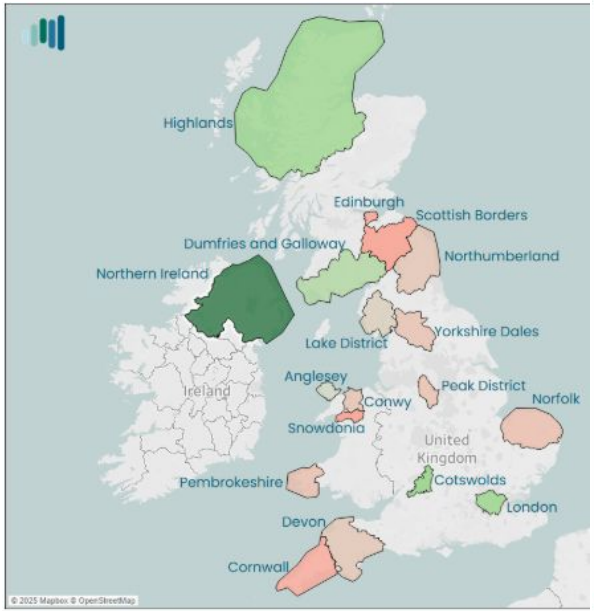
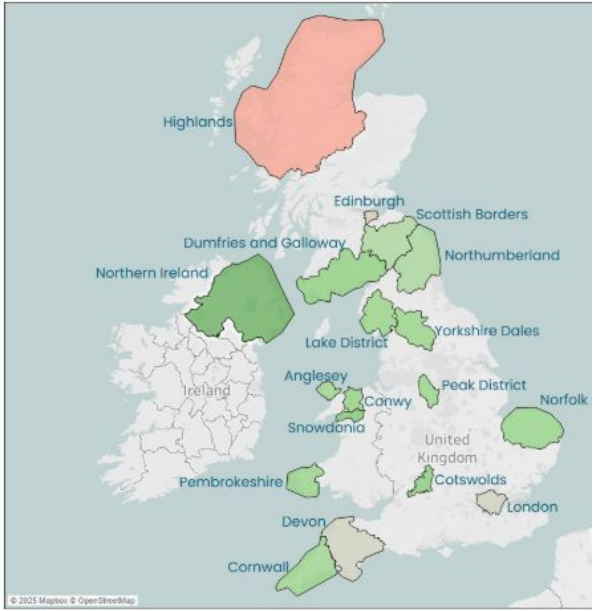
Guest paid occupancy



Average Daily Rate



- Visual connection between occupancy and rates
- **Highlands sacrificing** rates for occupancy
- **Cornwall (and many other regions)** sacrificing occupancy for rates.
- Only a handful of regions showing positive growth in both
    - Cotswolds, D&G, N. Ireland

2025 Year-to-Date RevPAR

Direct data for arrivals January 1 - May 31

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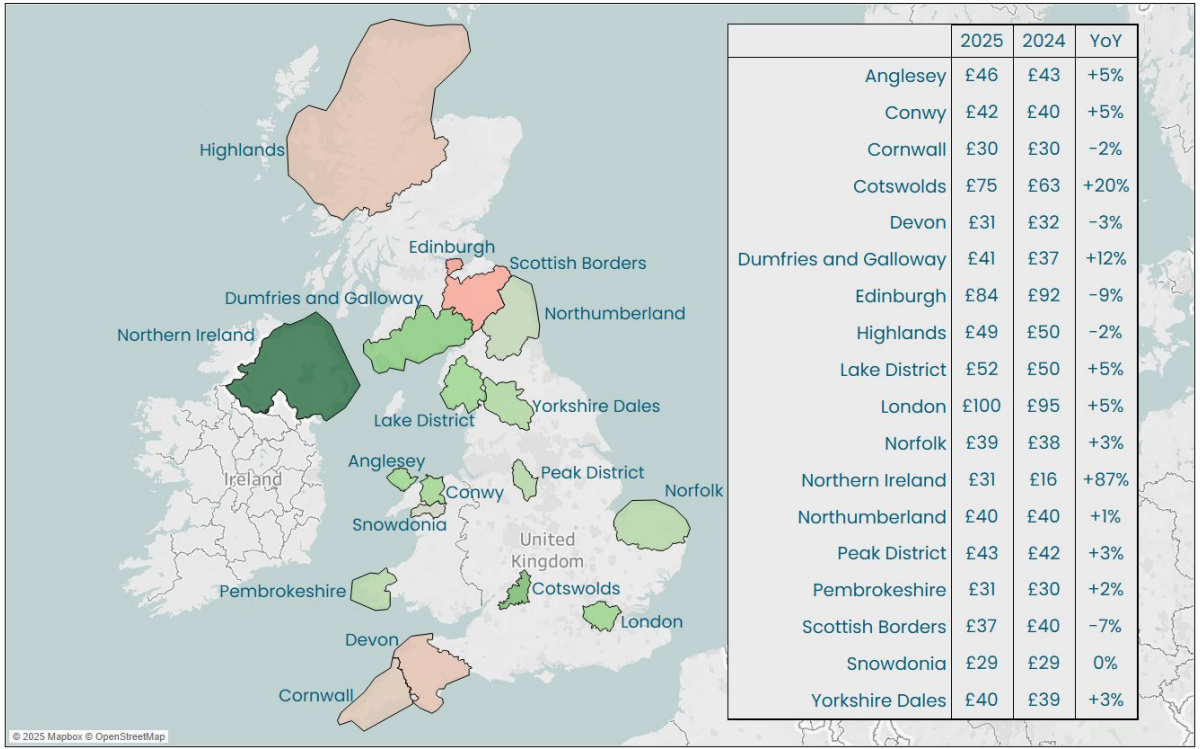
RevPAR YoY



	2025	2024	YoY
Anglesey	£46	£43	+5%
Conwy	£42	£40	+5%
Cornwall	£30	£30	-2%
Cotswolds	£75	£63	+20%
Devon	£31	£32	-3%
Dumfries and Galloway	£41	£37	+12%
Edinburgh	£84	£92	-9%
Highlands	£49	£50	-2%
Lake District	£52	£50	+5%
London	£100	£95	+5%
Norfolk	£39	£38	+3%
Northern Ireland	£31	£16	+87%
Northumberland	£40	£40	+1%
Peak District	£43	£42	+3%
Pembrokeshire	£31	£30	+2%
Scottish Borders	£37	£40	-7%
Snowdonia	£29	£29	0%
Yorkshire Dales	£40	£39	+3%

- UK overall pacing up a little
- **Mixed performance** with 6 regions flat/down, 12 pacing up
- Driven in the main by higher rates
- Northern Ireland , Cotswolds and Dumfries and Galloway showing strongest **growth**
- The **balance** between rates and occupancy has never been more important to perfect

2025 Year-to-Date Avg. Stay Length

Direct data for arrivals January 1 - May 31

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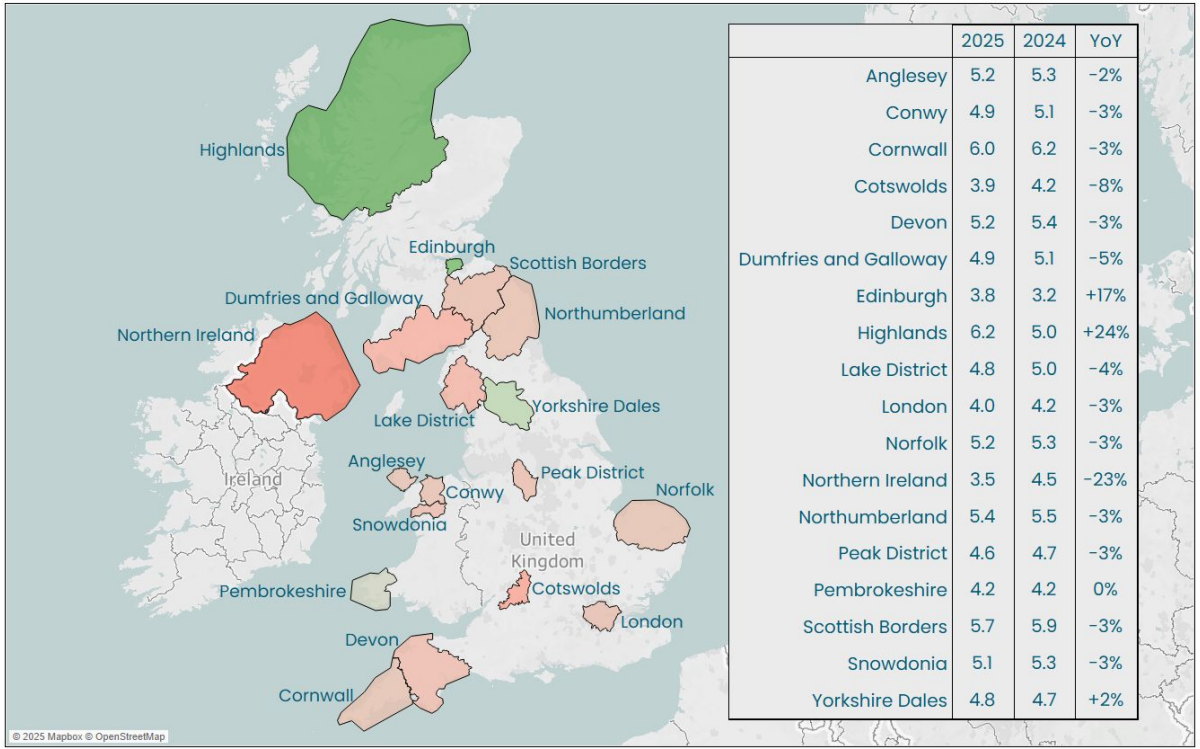
Avg. Stay Length YoY



	2025	2024	YoY
Anglesey	5.2	5.3	-2%
Conwy	4.9	5.1	-3%
Cornwall	6.0	6.2	-3%
Cotswolds	3.9	4.2	-8%
Devon	5.2	5.4	-3%
Dumfries and Galloway	4.9	5.1	-5%
Edinburgh	3.8	3.2	+17%
Highlands	6.2	5.0	+24%
Lake District	4.8	5.0	-4%
London	4.0	4.2	-3%
Norfolk	5.2	5.3	-3%
Northern Ireland	3.5	4.5	-23%
Northumberland	5.4	5.5	-3%
Peak District	4.6	4.7	-3%
Pembrokeshire	4.2	4.2	0%
Scottish Borders	5.7	5.9	-3%
Snowdonia	5.1	5.3	-3%
Yorkshire Dales	4.8	4.7	+2%

- **Pacing 0.2 days behind** 2024, following 0.2 day shortening
- **Universal shortening of stays** with year on year decreases in all regions highlighted
- Northern Ireland shows most dramatic stay reduction (-23%)
- **Cornwall** commands the longest length of stay, with Edinburgh the shortest.
- **Ensure you communicate with your owners**

2025 Year-to-Date Avg. Booking Window

Direct data for arrivals January 1 - May 31

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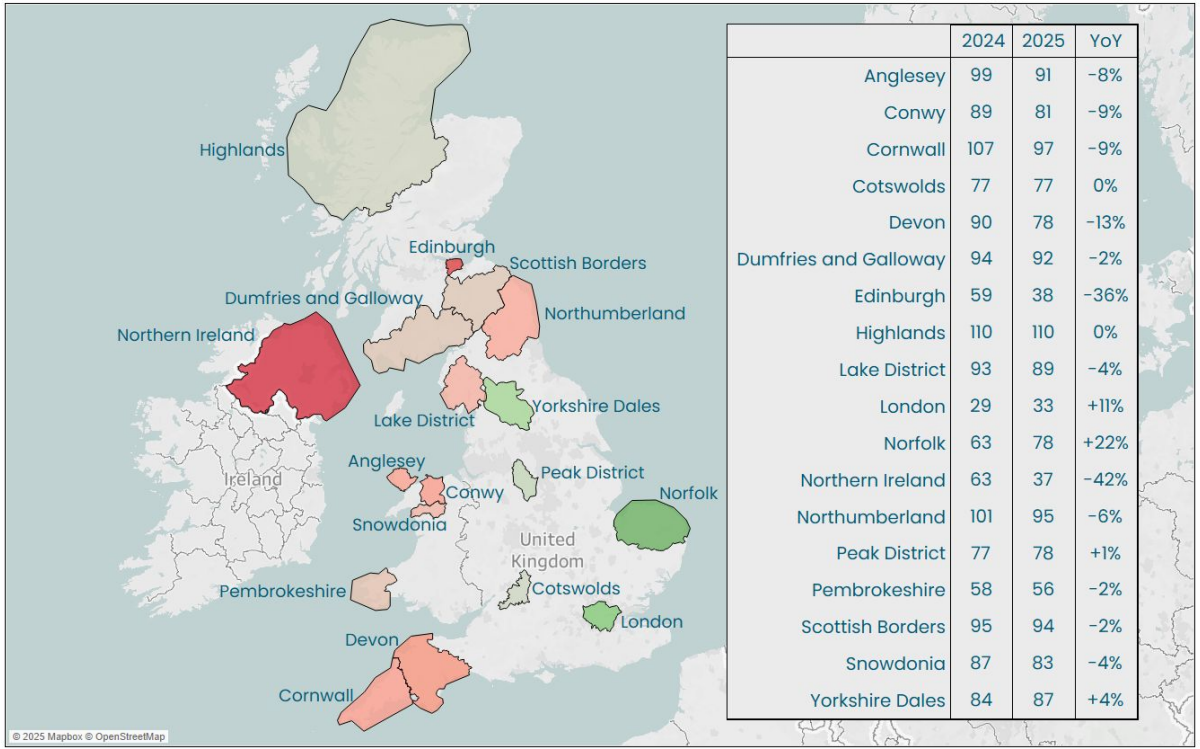
Avg. Booking Window YoY



	2024	2025	YoY
Anglesey	99	91	-8%
Conwy	89	81	-9%
Cornwall	107	97	-9%
Cotswolds	77	77	0%
Devon	90	78	-13%
Dumfries and Galloway	94	92	-2%
Edinburgh	59	38	-36%
Highlands	110	110	0%
Lake District	93	89	-4%
London	29	33	+11%
Norfolk	63	78	+22%
Northern Ireland	63	37	-42%
Northumberland	101	95	-6%
Peak District	77	78	+1%
Pembrokeshire	58	56	-2%
Scottish Borders	95	94	-2%
Snowdonia	87	83	-4%
Yorkshire Dales	84	87	+4%

- **Shorter** booking lead times with many of the regions showing year on year decreases or flat
- **Norfolk** seeing a longer booking window (+2 weeks)
- **Pembrokeshire** commands the shortest booking window (excl. **London, Edinburgh)** and it's getting shorter
- **Highlands** is the longest booking window and it's flat.