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UK Summer Trends

Short Term Rentals

14th July 2026

Direct Data · England, Scotland & Wales · Arrivals 17 Jul – 3 Sep 2026

FULL YEAR 2026 · DIRECT · 3 MARKETS

Full Year 2026 Snapshot

Arrivals 1 Jan – 31 Dec 2026 vs. 2 Jan – 1 Jan 2025/26 · as of 6/7 Jul

PAID OCC. %

28.4%

2025: 28.5%

↘ −0.4%

ADR

£163

2025: £158

↗ +3.2%

REVPAR

£46

2025: £45

↗ +2.2%

AVG. LENGTH OF STAY

5.2

2025: 5.3

↘ −1.9%

AVG. STAY VALUE

£857

2025: £836

↗ +2.5%

OWNER NIGHTS + HOLDS %

22.0%

2025: 19.3%

↗ +14.0%

Weekly Guest Bookings Pickup · Direct

● England +Scotland + Wales: 3.0% avg

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QUESTION

"Looking at peak summer arrivals, Summer 2026, what's the data telling us?"

Summer 2026 Snapshot: UK

Arrivals 17 Jul – 3 Sep 2026 vs. same window 2025 · as of 11 July

SUMMER SCHOOL HOLIDAYS · YEAR OVER YEAR

PAID OCC. %

39.9%

2025: 40.2%

↘ −0.7%

ADR

£215

2025: £205

↗ +4.9%

REVPAR

£86

2025: £83

↗ +3.6%

AVG. LENGTH OF STAY

5.8

2025: 5.9

↘ −1.7%

AVG. STAY VALUE

£1,267

2025: £1,239

↗ +2.3%

OWNER NIGHTS AND HOLDS %

22.6%

2025: 19.9%

↗ +13.6%

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QUESTION

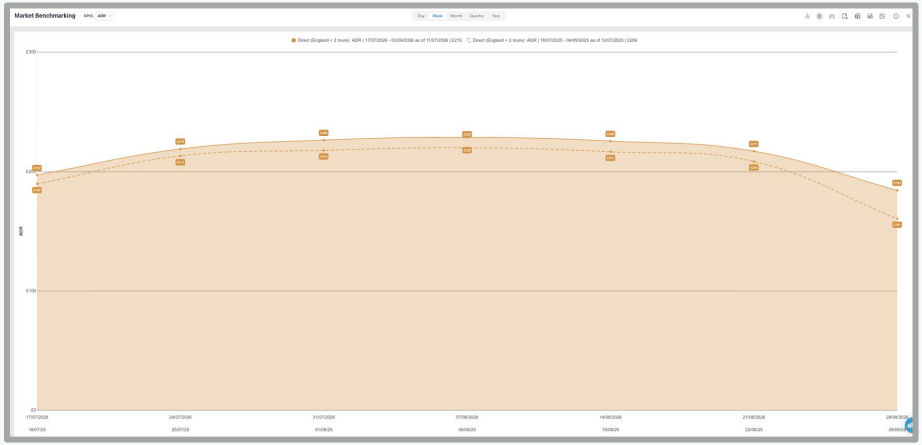
"Looking at peak summer arrivals, Summer 2026, what's the data telling us?"

Summer 2026 Snapshot: UK

Arrivals 17 Jul – 3 Sep 2026 vs. same window 2025 · as of 11th July **SUMMER SCHOOL HOLIDAYS · YEAR OVER YEAR**

Guest paid occupancy

Average Daily Rates



- ➔ Guest occupancy is pacing higher for July
- ➔ Softens in August

- ➔ Rates are consistently higher across all peak arrival weeks

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QUESTION

"Looking at the data for Summer 2026, what's the biggest trend that short-term rental owners and managers haven't fully recognised yet?"

What Trends Are Missed: June and July Bookings

Occupancy pace, same arrival window

+28.7%

30.3% on the books as of 1 Jun → 39.0% as of 7 Jul

Pacing growth by length of stay

1 Night	+21.4%
2 Nights	+24.6%
3 Nights	+20.7%
4 Nights	+21.1%
5 Nights	+20.5%
6 Nights	+11.5%
7 Nights	−11.7%

Paid Occupancy by Bedroom Size

1 Bedroom	19.1%
2 Bedrooms	29.2%
3 Bedrooms	39.0%
4 Bedrooms	48.6%
5 Bedrooms	47.0%
6 Bedrooms	43.6%
7 Bedrooms	38.9%

- **Demand hasn't disappeared** — Every stay length under a week is pacing well ahead since the start of June, while the traditional week stay is going in the opposite direction
- As we get closer to arrival, demand will show up in a different way.
  - The booking share for smaller bedroom sizes will increase

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QUESTION

“What separates the top performing owners and property managers from everyone else in today's market?”

What Separates the Top 10%

RevPAR increases while occupancy softened

+2.4% RevPAR

−1.3% Paid Occ. %

They've got a strategy to **grow RevPAR** even when trading's a bit softer, holding firm on the rates that are actually booking and getting more granular with the data to land on the right answer.

Owner nights & Holds, year over year

21.6% +19.3%

2025: 18.1%

They've **managed owner nights and holds** throughout the year, protecting the most important summer stays. Those that haven't are losing vital inventory over summer.

➔ The gap isn’t who books the most nights — it’s who protects blended revenue per available unit at the time that matte

QUESTION

"Revenue growth has become harder than it was a few years ago. Based on KeyData benchmarks, where are operators and managers leaving the most money on the table?"

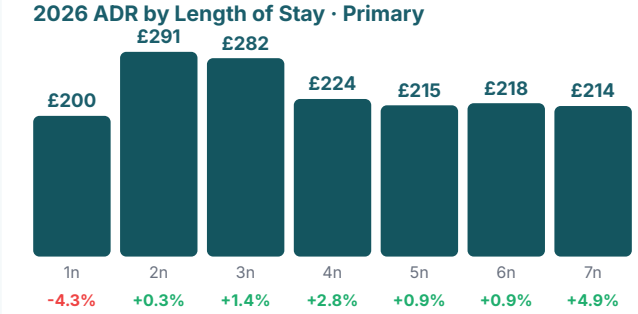
Where Revenue Is Left on the Table

Avg. Length of Stay

5.9

2025: 6.0 nights

−1.7% YoY



- ➔ Minimum-stay rules built around the traditional 7-night block are turning away exactly the demand that's growing fastest.
- ➔ Length of stay shortens as we get closer to arrival
- ➔ Loosening restrictions around that block is the clearest untapped revenue.
- ➔ **Pricing correctly for short breaks is vital**
- ➔ 2 nights commands the highest ADR this summer

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QUESTION

"Dynamic pricing tools have become the norm. How should operators and managers think beyond pricing to maximise RevPAR and profitability in 2026?"

Outside Pricing: The Other RevPAR Levers

Stay-Length Mix

Loosen minimum-stay rules around fixed weekly blocks to capture growing short-stay demand without dropping rate.

Channel Mix & Cost

Direct still carries the highest stay value. Fund it deliberately rather than letting OTA share drift up by default.

Owner Communication

Sharing Data with Owners. Owner nights are up. Managing this trend closely and sharing broader market trends is critical to protecting the peak-season inventory

Many operators use both an RMS and KeyData.

- ➔ KeyData identifies where pricing action is needed and informs the strategy.
- ➔ The RMS executes it.
- ➔ KeyData allows you to check whether it has worked.
- ➔ Many RMS platforms suggest lowering prices when the booking window shortens. KeyData helps you understand the wider market context, rather than relying on a single property performance using a pricing algorithm.
- ➔ It shouldn't be a rate race to the bottom.

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QUESTION

"For owners and property managers watching empty calendars just two weeks out, how can they use pacing data to avoid 'panic discounting' while still capturing that late-arrival demand?"

Reading Pacing Data, Not Panicking

Same arrival window (17 Jul – 3 Sep 2026)	On the books, 1 Jun	On the books, 7 Jul
Paid Occ. %	**30.3%**	**39.0%**
ADR	**£230**	**£218**
Avg. Length of Stay	**6.2**	**5.9**

Do you have an Empty Calendar?

- ➔ **In 2025, from 7th July to 17th July, over 189K guest nights were booked in the UK.**
- ➔ 44% of those guest nights came from stays of 5 days and under.
- ➔ The right strategy turns gaps into gains — get your pricing and availability aligned, and the bookings will follow.

There are still a lot of people yet to book for the summer. Be ready to capture last-minute demand.

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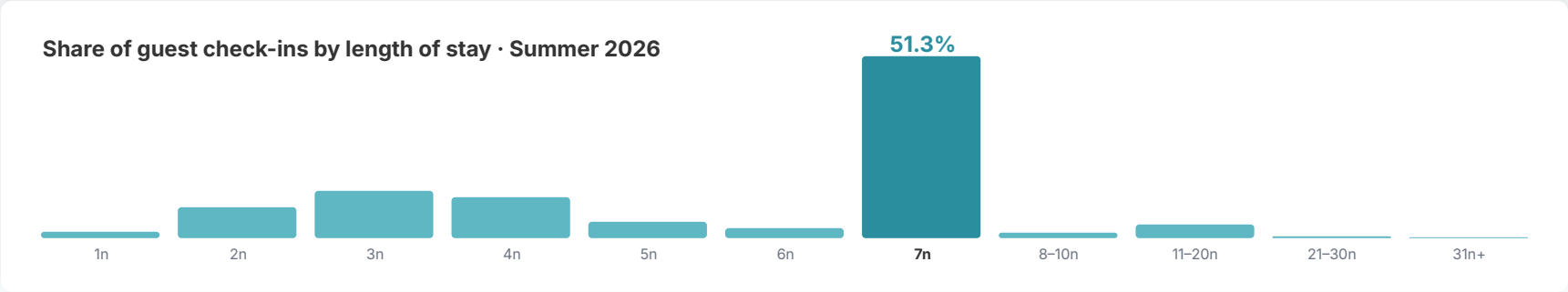
QUESTION

"With staffing shortages and revenue pressures, how should owners and managers leverage Length of Stay data to optimise workflows and stay profitable without relying on adding more properties?"

Length of Stay as an Operations Lever



- 7-night stays still rule! Over half of check-ins are booked 180 days out. Worth remembering for 2027 — and worth digging into the data to see how you can pull bookings forward, which would attract a better stay value.

- The booking patterns are becoming **bimodal.** Attract the early booker but be operationally prepared to service the late booking guests

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QUESTION

"If you were advising an owner or property manager planning for the next 12 months, which KPIs would you track every single week — and why?"

Three KPIs to Track Every Week

ADR

Pricing power

Shows whether rate strategy is holding up week to week, independent of how many nights sell.

PAID OCC. %

Demand capture

The earliest signal that pacing is running ahead or behind the same point last year.

REVPAR

The number that can't be gamed

Combines the two, so a rate cut that buys occupancy shows up immediately if it isn't actually worth it.

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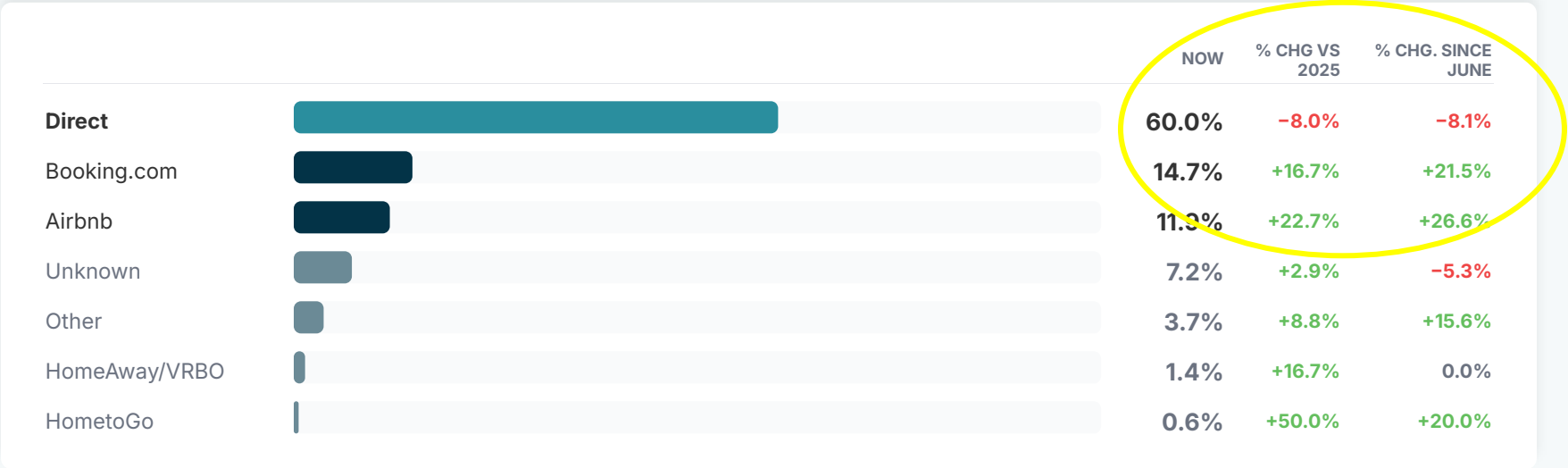
QUESTION

"Direct bookings have lost share toward OTAs. How should owners and property managers balance their channel distribution strategy right now?"

Direct vs OTA: The Channel Mix: Summer arrivals



	NOW	% CHG VS 2025	% CHG. SINCE JUNE
Direct	60.0%	−8.0%	−8.1%
Booking.com	14.7%	+16.7%	+21.5%
Airbnb	11.9%	+22.7%	+26.6%
Unknown	7.2%	+2.9%	−5.3%
Other	3.7%	+8.8%	+15.6%
HomeAway/VRBO	1.4%	+16.7%	0.0%
HometoGo	0.6%	+50.0%	+20.0%

- ➔ Direct still leads at 60.0% of guest check-ins, though its share has slipped 8.0% YoY as OTA channels increase
- ➔ Treat OTAs as incremental reach that funds fixed costs. Help Internationalise your customer base.
- ➔ The priority is protecting direct's share of the highest-value bookings, not eliminating OTA share.

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QUESTION

“Looking ahead, what will have the biggest impact on the short-term rental industry over the next two to three years: AI, changing guest behaviour, regulation, distribution channels, or something else?”

What Shapes the Next Two to Three Years

01

Guest Behaviour

Already moving — the booking window is compressing this summer, in this data.

02

AI & Automation

The response mechanism — pricing and ops fast enough to react weekly, not seasonally.

03

Distribution

Direct vs OTA balance keeps shifting with acquisition cost, not loyalty alone.

04

Regulation

Short-term let regulation in the UK has already been tightened in Scotland and Wales, and with England's planned mandatory registration scheme, changes for STR use is on the way..

➔ **None of these move in isolation. Guest behaviour is setting the pace right now — and whoever adapts pricing, operations and distribution using data will lead the next two to three years.**

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CLOSING

Key Takeaways

01 Monitor rates through soft weeks — RevPAR discipline is what separates the top 10%.

02 Loosen stay-length rules around the 7-night block to capture the fastest-growing demand.

03 Track ADR, Paid Occ. % and RevPAR weekly — together, not in isolation.

04 Compare pace to last year's curve, not a fully-booked ideal, before discounting.

05 Use channels strategically — do not let them use you.

06 Use KeyData to make data-driven decisions that optimise performance.

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Thank you

To understand how KeyData can help you, contact:

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