



England Occupancy Survey

July 2025 Results

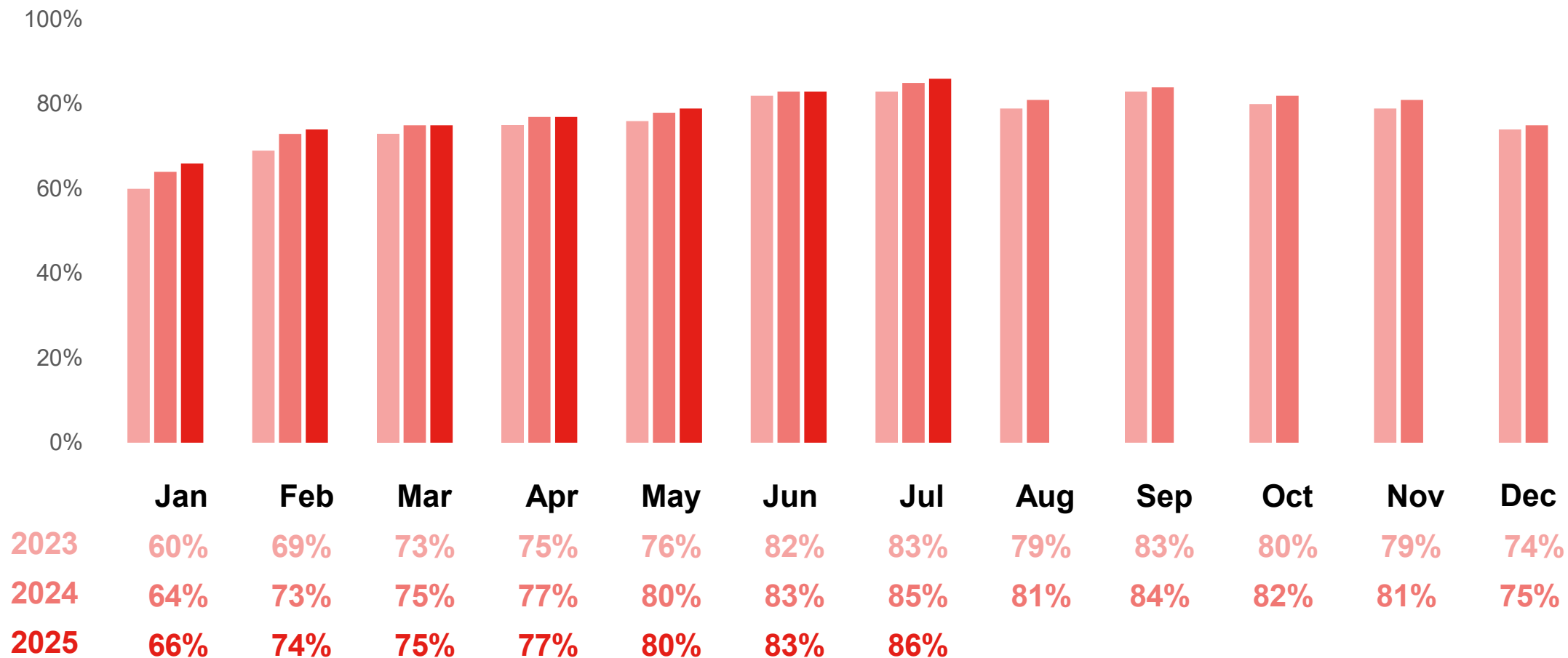
VisitEngland Research

Summary of Results

- **Hotel room occupancy** for July 2025 was 86%, 1% higher than July 2024. Year to date occupancy for 2025 was 77%, on par with the same period for 2024. Occupancy excluding London was 84% for July 2025, 2% higher than last year.
- Observing **forward looking occupancy** for the following 3 months of 2025. As of the 3rd August, occupancy rates committed so far for August 2025 were 56%, followed by 27% for September and 15% for October 2025. These rates will rise as the months progress and more bookings are made.
- **Average Daily Rates** increased by 1% in July 2025 to £191, with **RevPAR** (Revenue per Available Room) also increasing compared to July 2024 (+4% to £165). ADR excluding London was £113 (+3%), and RevPAR was £95 (+5%).
- **Room demand** declined in July 2025, though less sharply than in February, which remains the month with the steepest drop in demand so far this year. Compared to July 2024, demand 2.1% lower. Supply was similar, at -3.2% compared to July 2024.
- **Regionally**, the West Midlands recorded the largest increase in occupancy compared to July 2024, rising by 6%. In contrast, the North East and the South East saw the steepest declines, with occupancy falling by 1% each. The West Midlands also reported the strongest growth in both ADR (+8%) and RevPAR (+17%), while the East Midlands experienced the sharpest decline in ADR (-5%) and in RevPAR (-5%).
- The **larger hotels** had the highest room occupancy in July, at 89% occupation for hotels with 300+ rooms, 1% higher than July 2024.

England Room Occupancy

England Room Occupancy by Month



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

England Room Occupancy

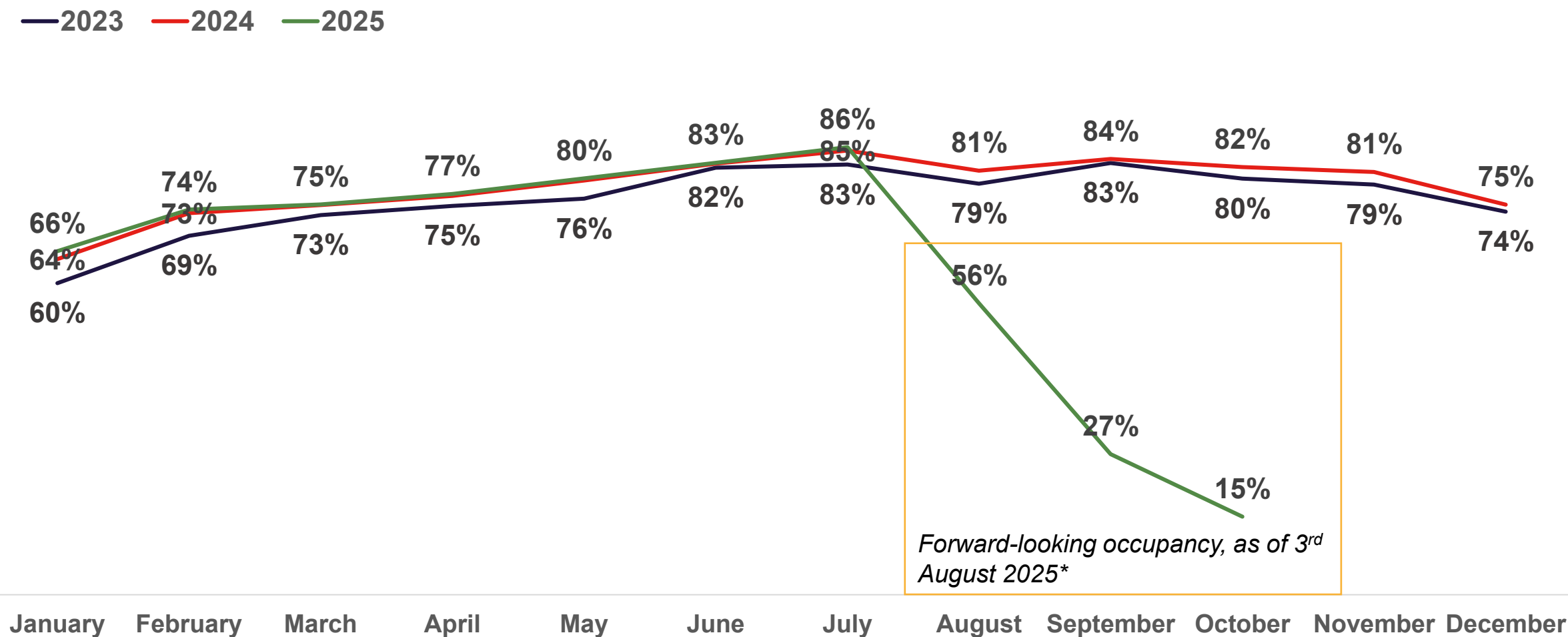
Data Tables – July 2025

Room Occupancy	2023	2024	2025	2024-2025 pp change
July	83%	85%	86%	1%
July Year to Date	74%	77%	77%	0%
July Weekend	85%	87%	88%	1%
July Weekday	82%	85%	86%	1%

Weekend = Friday & Saturday nights, Weekday = Sunday - Thursday

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2024 Occupancy rates and forward look for 2025

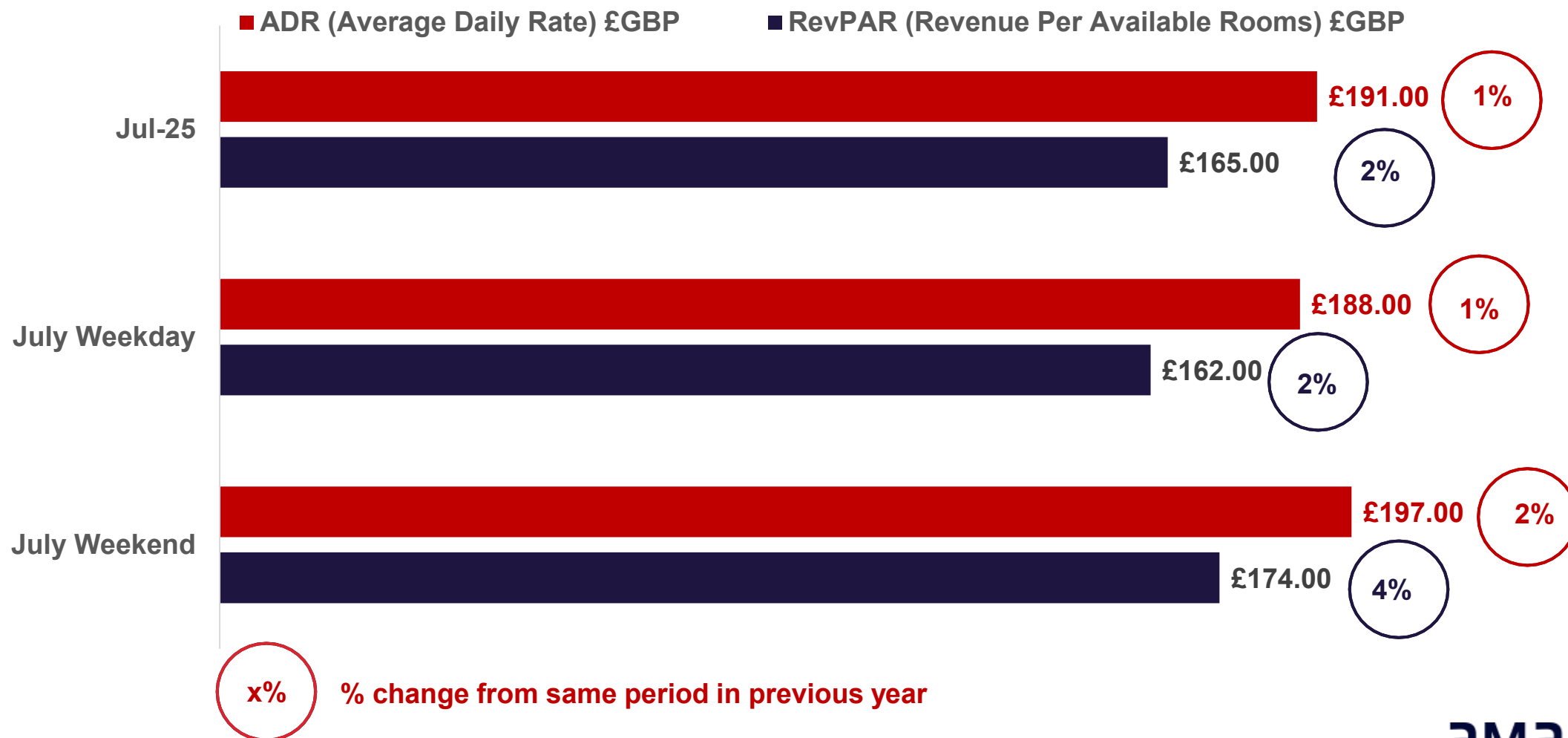


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*Forward looking occupancy rates are not a forecast, but rather the % of committed occupancy so far, as of the date listed

England ADR and RevPAR

At a glance – July 2025



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England ADR and RevPAR

Data Tables – July 2023, 2024 & 2025

ADR	2023	2024	2025	2024-25 % change	RevPAR	2023	2024	2025	2024-25 % change
July	£189	£189	£191	1%	July	£156	£161	£165	2%
July Weekend	£195	£193	£197	2%	July Weekend	£165	£167	£174	4%
July Weekday	£187	£187	£188	1%	July Weekday	£167	£159	£162	2%

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

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

Change in room demand, year-on-year

Month	2022-23	2023-24	2024-25
January	75.8%	9.4%	-1.5%
February	31.2%	11.7%	-6.3%
March	20.4%	4.2%	-3.5%
April	20.3%	3.9%	-2.9%
May	13.8%	5.0%	-3.4%
June	13.8%	1.3%	-3.2%
July	9.5%	3.2%	-2.1%
August	11.8%	2.8%	
September	12.9%	0.4%	
October	8.4%	2.1%	
November	8.7%	2.4%	
December	10.7%	0.9%	

Change in room supply, year-on-year

Month	2022-23	2023-24	2024-25
January	4.8%	1.6%	-3.1%
February	4.5%	5.2%	-6.6%
March	4.4%	1.5%	-3.3%
April	4.5%	1.3%	-3.3%
May	4.9%	0.4%	-3.3%
June	4.8%	0.3%	-3.3%
July	5.1%	-0.1%	-3.2%
August	5.4%	-0.3%	
September	5.2%	-0.6%	
October	4.3%	-0.7%	
November	3.3%	-0.7%	
December	2.7%	-0.9%	

Occupancy by Hotel Size

Data Tables – July 2023, 2024 & 2025

Room Occupancy	2023	2024	2025	<i>pp change 2024-25</i>
1-100 Rooms	84%	82%	81%	-1%
101-200 Rooms	82%	84%	85%	1%
201-300 Rooms	81%	85%	87%	2%
300+ Rooms	85%	88%	89%	1%
ENGLAND TOTAL	83%	85%	86%	1%

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



Regional Occupancy, ADR and RevPAR

Occupancy by Region

Data Tables – July 2023, 2024 & 2025

Room Occupancy	2023	2024	2025	<i>pp change 2024-25</i>
East Midlands	79%	83%	83%	0%
East of England	83%	83%	83%	0%
Greater London	85%	88%	89%	1%
Northeast England	86%	87%	86%	-1%
Northwest England	79%	82%	82%	-0%
Southeast England	85%	88%	87%	-1%
Southwest England	80%	80%	84%	4%
West Midlands	74%	73%	79%	6%
Yorkshire & Humberside	85%	86%	86%	0%
TOTAL ENGLAND	83%	85%	86%	1%
TOTAL ENGLAND (excl London)	81%	82%	84%	2%

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

ADR by Region

Data Tables – July 2023, 2024 & 2025

ADR	2023	2024	2025	% change 2024-25
East Midlands	£99	£108	£103	-5%
East of England	£115	£115	£119	3%
Greater London	£ 260	£260	£263	1%
Northeast England	£94	£97	£104	7%
Northwest England	£107	£98	£110	12%
Southeast England	£123	£127	£125	-2%
Southwest England	£113	£117	£120	2%
West Midlands	£106	£97	£104	8%
Yorkshire & Humberside	£103	£102	£101	-1%
TOTAL ENGLAND	£189	£189	£191	1%
TOTAL ENGLAND (excl London)	£111	£109	£113	3%

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RevPAR by Region

Data Tables – June 2023, 2024 & 2025

RevPAR	2023	2024	2025	% change 2024-25
East Midlands	£79	£90	£85	-5%
East of England	£95	£95	£98	3%
Greater London	£220	£229	£235	2%
Northeast England	£80	£84	£89	7%
Northwest England	£84	£80	£90	12%
Southeast England	£104	£111	£109	-2%
Southwest England	£91	£94	£101	6%
West Midlands	£78	£71	£83	17%
Yorkshire & Humberside	£88	£87	£87	0%
TOTAL ENGLAND	£156	£161	£165	2%
TOTAL ENGLAND (excl London)	£89	£90	£95	5%

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Methodology



Methodology Statement

In May 2024, a change of suppliers was made to the hotel occupancy data. The data in this report is now provided by Amadeus, a hotel market data company, from their constantly growing panel of hotels across the UK.

This data set represents approximately a third of the estimated market so should be used as an indication of trends rather than the picture of the whole market.

Amadeus collects the following performance metrics from participating hotel on a daily 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 has included historical data from Amadeus in this reports from January 2019 onwards.

All previous months' reports and data can be found on the VisitEngland website: <https://www.visitbritain.org/research-insights/england-hotel-occupancy-latest>

If you have any questions on this report, please do contact the VisitBritain/VisitEngland research team: research@visitbritain.org

Please note that these statistics are in development.

For further questions please contact:
research@visitbritain.org