England Occupancy Survey

November 2025 Results

VisitEngland Research

Summary of Results

- **Hotel room occupancy** for November 2025 was 79%, down 2 percentage points on November 2024. This is supported by a decline in demand for rooms of -6.3%, whilst supply was down to a lower degree of -4.3%. Year to date (Jan-Nov) occupancy for 2025 was 79%, on par with the same period for 2024.

- Observing **forward looking occupancy** for the remainder of 2025. As of the12th December, occupancy rates committed so far for December 2025 were 60%. This rate will rise as the month matures and more bookings are made.

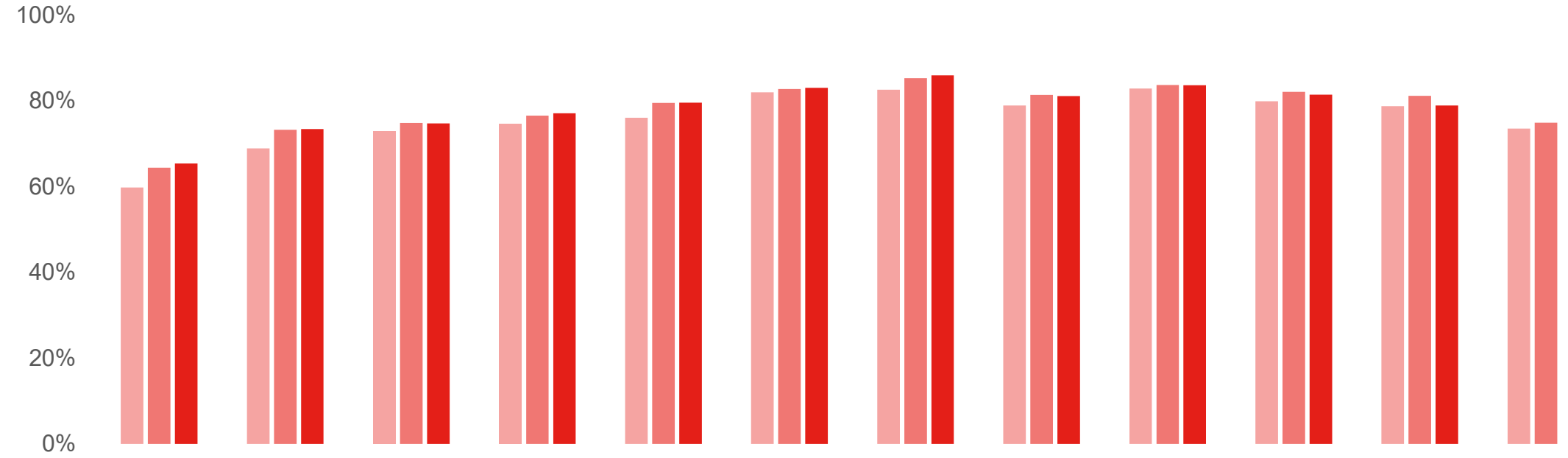
- **Average Daily Rates** for England increased by 1% in November 2025 to £169, with **RevPAR** (Revenue per Available Room) falling slightly compared to November 2024 at £134, both sitting below the rate of inflation for November (3.2%). ADR for England excluding London was £103 (+1%), and RevPAR was £79 (-1%).

- **Regionally,** the South West recorded the greatest increase in occupancy compared to November 2024, rising by 3pp. In contrast, many regions saw declines with Yorkshire & Humberside experiencing the biggest year on year decline (-5pp) followed by the East of England (-4pp).

- The **largest hotels** had the largest year on year decline in occupancy, down 3% to 81% in November 2025.

England Room Occupancy

England Room Occupancy by Month



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	60%	69%	73%	75%	76%	82%	83%	79%	83%	80%	79%	74%
2024	64%	73%	75%	77%	80%	83%	85%	81%	84%	82%	81%	75%
2025	65%	73%	75%	77%	80%	83%	86%	81%	84%	82%	79%	

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

England Room Occupancy

Data Tables – November 2025

Room Occupancy	2023	2024	2025	*2024-2025 pp change*
November	79%	81%	79%	*-2%*
November Year to Date	76%	79%	79%	*0%*
November Weekend	81%	82%	81%	*-1%*
November Weekday	79%	81%	79%	*-2%*

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

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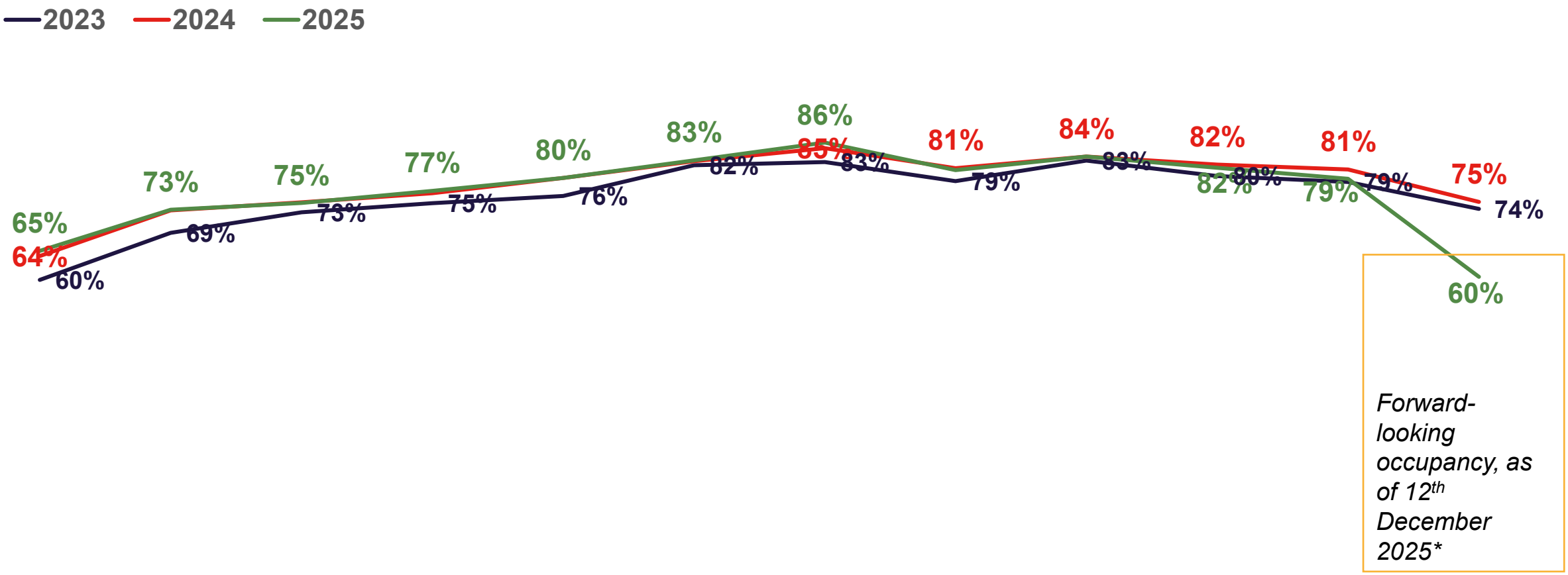
2023-2025 Occupancy rates and forward look for December 2025



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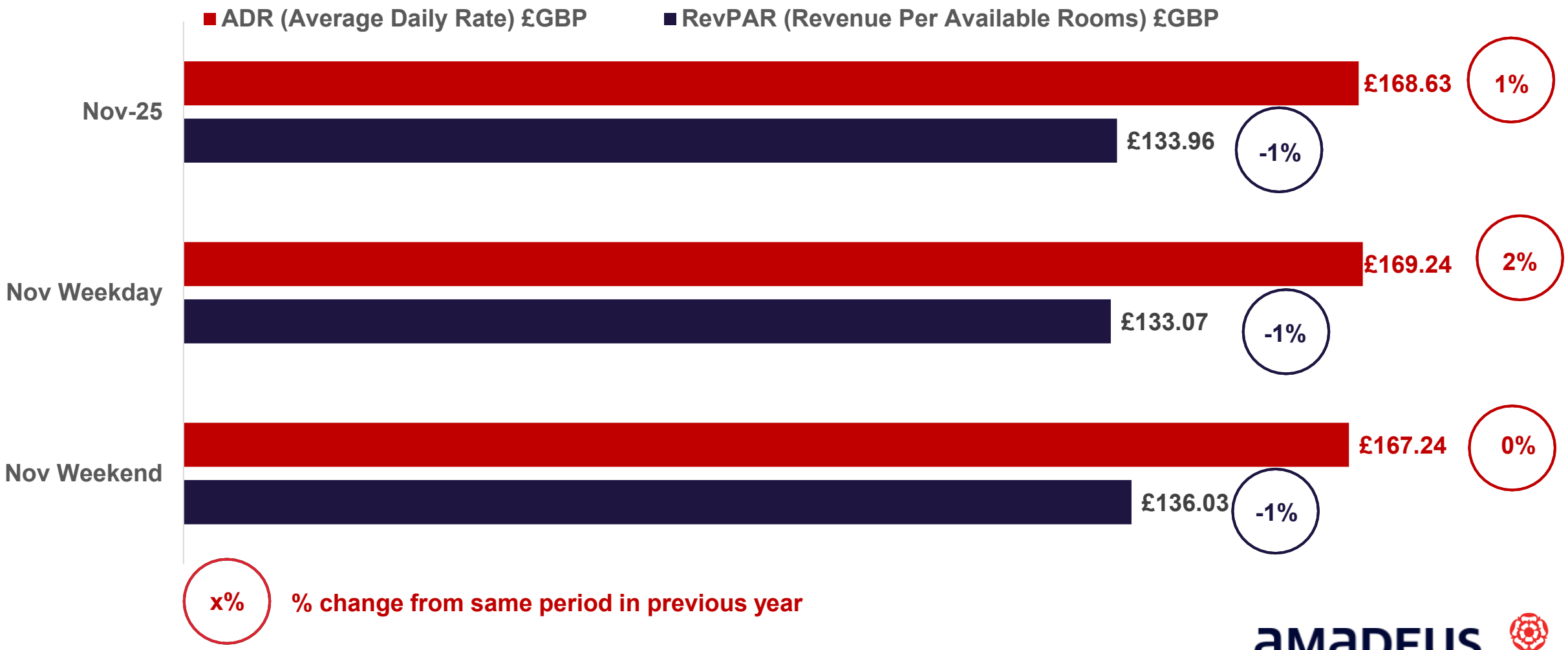
*Forward looking occupancy rates are not a forecast, but rather the % of committed occupancy so far, as of the date listed

England ADR and RevPAR

At a glance – November 2025



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England ADR and RevPAR

Data Tables – November 2023, 2024 & 2025

ADR	2023	2024	2025	2024-25 % change
November	£166	£166	£169	*1%*
November Weekday	£166	£166	£169	*2%*
November Weekend	£167	£167	£167	*0%*

RevPAR	2023	2024	2025	2024-25 % change
November	£131	£135	£134	*-1%*
November Weekday	£131	£134	£133	*-1%*
November Weekend	£132	£137	£136	*-1%*

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

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Change in room demand, year-on-year

Month	2022-23	2023-24	2024-25
January	75.8%	9.4%	-2.6%
February	31.2%	11.7%	-7.4%
March	20.4%	4.2%	-4.5%
April	20.3%	3.9%	-3.7%
May	13.8%	5.0%	-4.3%
June	13.8%	1.3%	-4.1%
July	9.5%	3.2%	-3.0%
August	11.8%	2.8%	-4.7%
September	12.9%	0.4%	-4.2%
October	8.4%	2.1%	-5.0%
November	8.7%	2.4%	-6.3%
December	10.7%	0.9%	

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Change in room supply, year-on-year

Month	2022-23	2023-24	2024-25
January	4.8%	1.6%	-4.1%
February	4.5%	5.2%	-7.6%
March	4.4%	1.5%	-4.3%
April	4.5%	1.3%	-4.3%
May	4.9%	0.4%	-4.3%
June	4.8%	0.3%	-4.3%
July	5.1%	-0.1%	-4.3%
August	5.4%	-0.3%	-4.3%
September	5.2%	-0.6%	-4.2%
October	4.3%	-0.7%	-4.2%
November	3.3%	-0.7%	-4.2%
December	2.7%	-0.9%	

Occupancy by Hotel Size

Data Tables – November 2023, 2024 & 2025

Room Occupancy	2023	2024	2025	*pp change 2024-25*
1-100 Rooms	76%	76%	74%	*-2%*
101-200 Rooms	76%	79%	77%	*-2%*
201-300 Rooms	80%	83%	83%	*0%*
300+ Rooms	84%	84%	81%	*-3%*
ENGLAND TOTAL	79%	81%	79%	*0%*

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

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Regional Occupancy, ADR and RevPAR

Occupancy by Region

Data Tables – November 2023, 2024 & 2025

Room Occupancy	2023	2024	2025	*pp change 2024-25*
East Midlands	76%	75%	75%	*0%*
East of England	73%	76%	72%	*-4%*
Greater London	81%	83%	82%	*-1%*
Northeast England	83%	81%	80%	*-1%*
Northwest England	77%	81%	78%	*-3%*
Southeast England	74%	77%	75%	*-2%*
Southwest England	70%	72%	75%	*3%*
West Midlands	77%	78%	79%	*1%*
Yorkshire & Humberside	81%	85%	80%	*-5%*
TOTAL ENGLAND	79%	81%	79%	*-2%*
TOTAL ENGLAND (excl London)	76%	78%	77%	*-1%*

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ADR by Region

Data Tables – November 2023, 2024 & 2025

ADR	2023	2024	2025	*% change 2024-25*
East Midlands	£96	£93	£92	*-1%*
East of England	£100	£99	£103	*4%*
Greater London	£223	£223	£230	*3%*
Northeast England	£91	£94	£98	*4%*
Northwest England	£104	£110	£106	*-4%*
Southeast England	£100	£98	£97	*0%*
Southwest England	£101	£100	£103	*3%*
West Midlands	£111	£109	£107	*-2%*
Yorkshire & Humberside	£100	£101	£117	*16%*
TOTAL ENGLAND	£166	£166	£169	*1%*
TOTAL ENGLAND (excl London)	£102	£102	£103	*1%*

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RevPAR by Region

Data Tables – November 2023, 2024 & 2025

RevPAR	2023	2024	2025	*% change 2024-25*
East Midlands	£73	£70	£69	*-2%*
East of England	£73	£75	£74	*-2%*
Greater London	£181	£186	£188	*1%*
Northeast England	£76	£77	£79	*2%*
Northwest England	£80	£90	£82	*-9%*
Southeast England	£74	£75	£73	*-3%*
Southwest England	£71	£73	£77	*6%*
West Midlands	£85	£85	£85	*0%*
Yorkshire & Humberside	£81	£85	£93	*9%*
TOTAL ENGLAND	£131	£135	£134	*-1%*
TOTAL ENGLAND (excl London)	£77	£80	£79	*-1%*

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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.

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For further questions please contact:
research@visitbritain.org

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