



UK Accommodation Barometer 2026



Dunrobin Castle, Scottish Highlands, Sutherland

UK accommodation providers enter 2026 from a position of steady and broadly positive sentiment. Three in five (61%) expect their business to develop favourably in the coming months, with the balance of opinion firmly weighted in that direction across past, present, and future assessments. The data also points to a market that is stabilising on a high note rather than accelerating, with sentiment largely unchanged from the previous year.

Hospitality operators around the world are navigating a more complex and uncertain environment. In the UK, hoteliers are particularly focused on external disruptions, including extreme weather and local infrastructure challenges, which stand out as leading concerns for the year ahead.

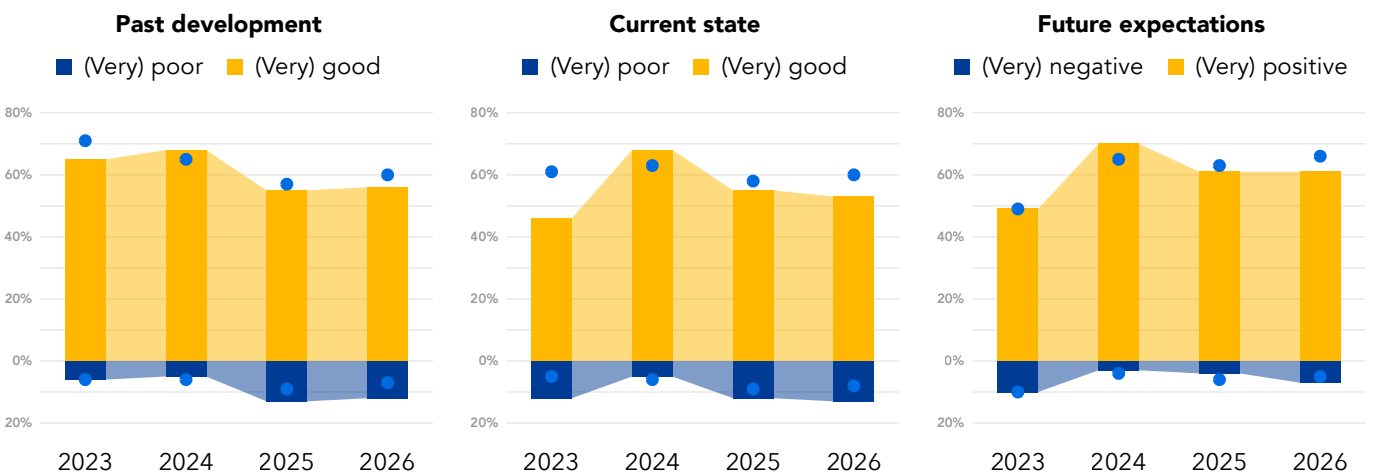
In response, British accommodation providers are taking a pragmatic approach to managing demand. Off-peak pricing strategies and broad use of digital distribution channels remain central to maintaining occupancy throughout the year, reflecting a continued focus on operational flexibility and business continuity, rather than growth-oriented investment.

Economic Sentiment

Consistent results with room for improvement

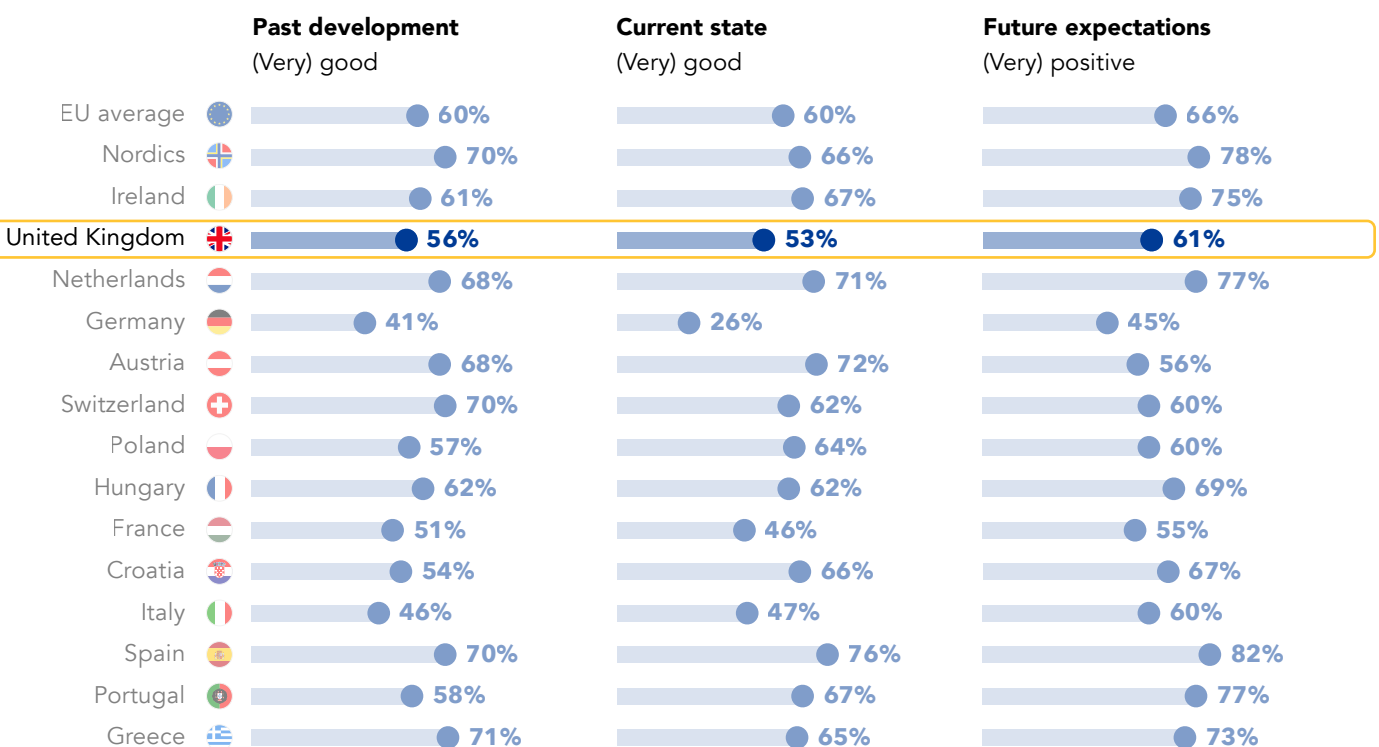
The share of UK accommodations with a positive outlook for the future remains encouraging and broadly in line with recent trends. For every hotelier assessing their recent business performance as poor or very poor (12%), nearly five rate it positively (56%), underlining the strong overall balance of sentiment. Three in five hoteliers (61%) expect their business to develop favourably in the coming months. At the same time, current conditions are not without pressure, with 53% reporting positive business development and 13% describing their situation as poor or very poor. While this points to some softening compared with 2025, the overall picture remains firmly weighted to the upside, suggesting a market that is stable rather than undergoing significant change in either direction.

Accommodations' perception of business development ● EU average



At 56%, the UK sits slightly below the EU average of 60% for hoteliers reporting positive business development in the last six months. Sentiment across Europe ranged from 41% (Germany) to 71% (Greece). The UK trails neighbouring Ireland (61%) but is ahead of comparable economies such as France (51%) and Germany (41%).

Accommodations' perception of business development, by country





Selfridges building, Birmingham

Stable operational performance and a cautious investment stance

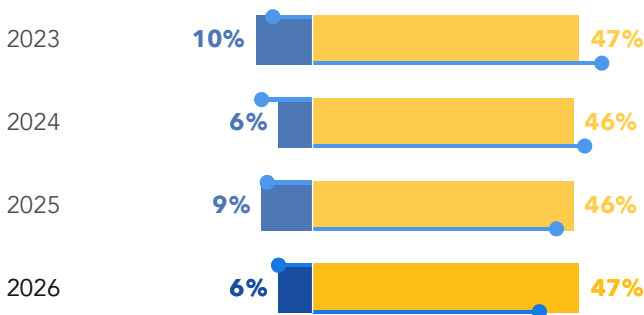
UK accommodation providers have reported consistent results over the past three years with regard to their daily rates and occupancy. 47% saw daily rates rise in the past six months (EU: 40%), while 48% reported higher occupancy (EU: 50%). The share of hoteliers who reported that they had little to no difficulty accessing financing has also barely changed year on year.

However, in 2026, the ratio of hoteliers reporting no difficulty accessing funds to those reporting difficulty has shifted from 2:1 in 2025 to 3:2, indicating a higher proportion of operators now experience difficulties accessing capital.

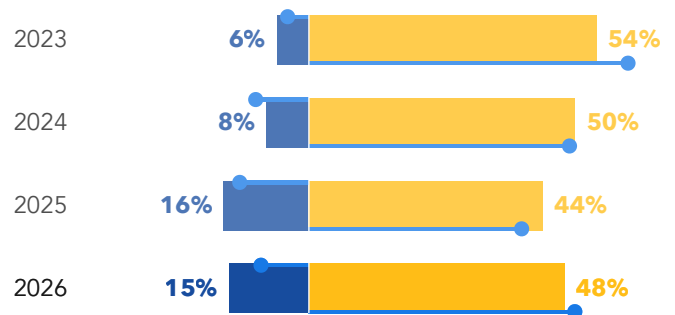
61% of UK hoteliers expect their business to develop positively in the next six months

Development of accommodation business in the last 6 months ● EU average

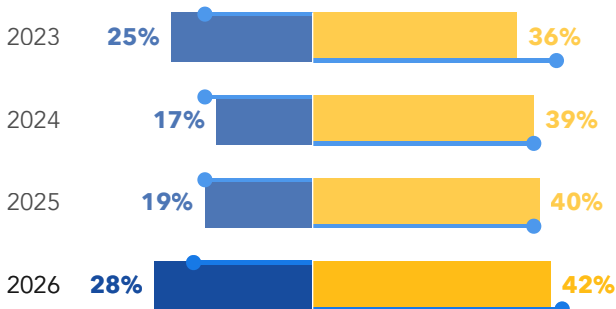
Development of average daily rate
(Strongly) decreased ■ (Strongly) increased



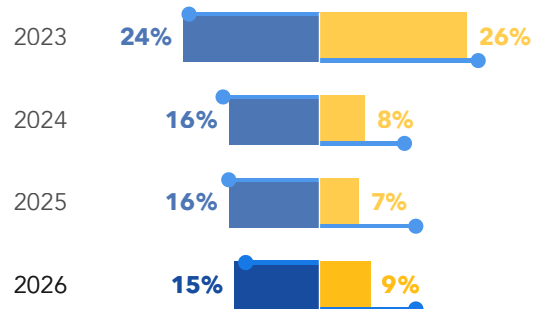
Development of occupancy rate
(Strongly) decreased ■ (Strongly) increased



Access to financing and capital
(Very) difficult ■ Not difficult (at all)



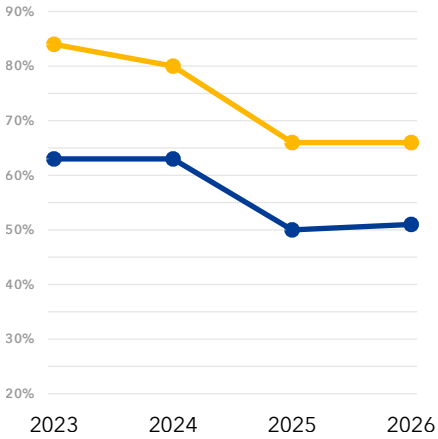
Investment plans
Invest less (than last 6 months) ■ Invest more (than last 6 months)



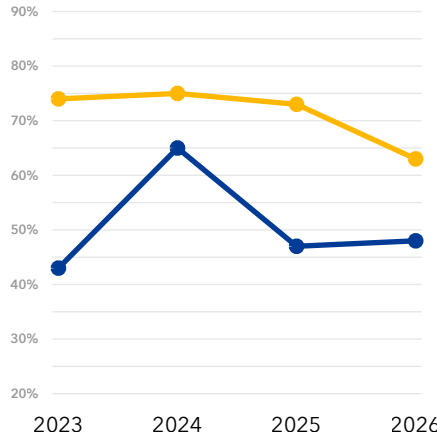
Perception of business development, by accommodation type

■ Chain hotels ■ Independent hotels

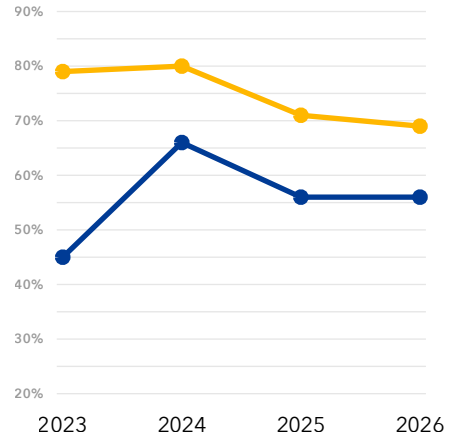
General development in the past 6 months
(Very) good



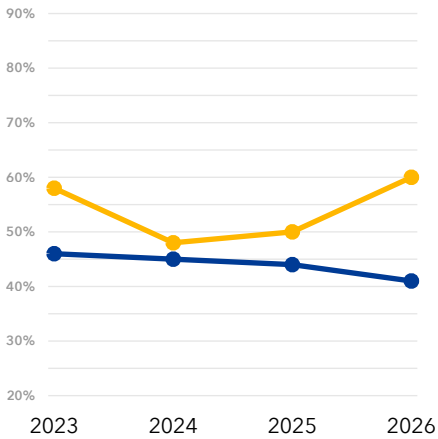
Current economic situation
(Very) good



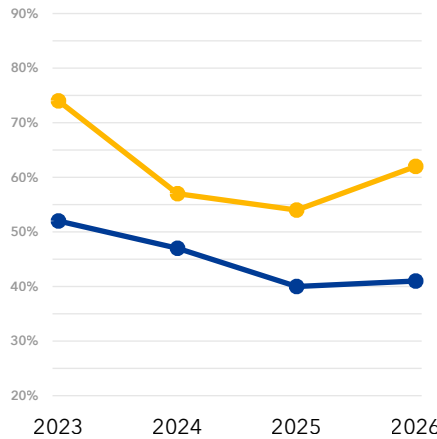
Economic situation in the next 6 months
(Very) positive



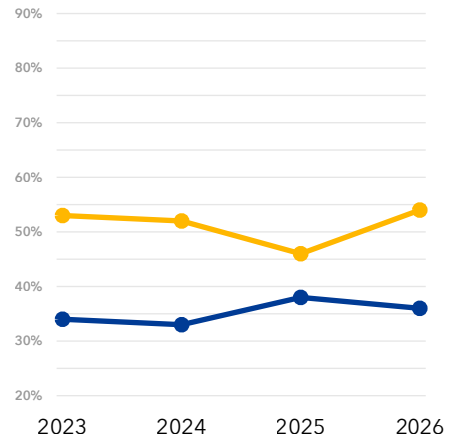
Development of average daily rate
(Strongly) increased



Development of occupancy rate
(Strongly) increased

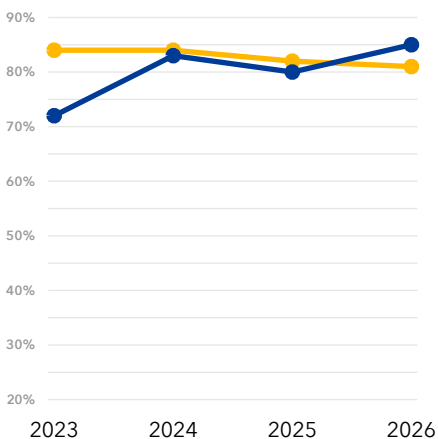


Access to financing and capital
Not difficult (at all)



Investment plans

Invest about the same or more (than the last 6 months)



In the UK, chain hotels consistently report more favourable business sentiment across all metrics, including economic conditions, key performance indicators, room rates and occupancy developments. Independent hotels track more conservatively by comparison.

Chains are typically better positioned to absorb economic pressures and leverage scale, whether through investment capacity, pace of technology adoption, or more favourable access to financing.

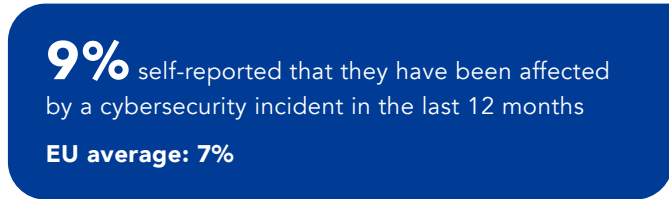
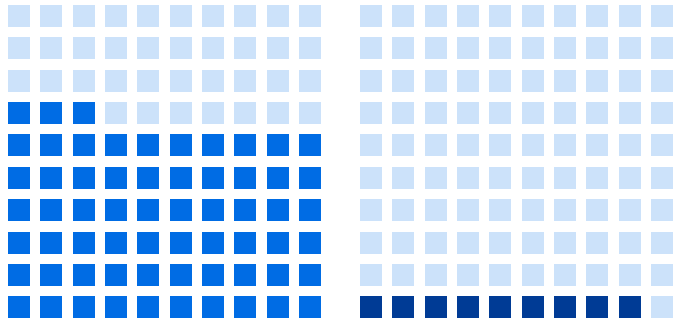
Despite these gaps, the overall perception of the business environment remains broadly aligned across accommodation types, suggesting that UK operators respond to the same underlying market conditions. This gap widened significantly in 2026 across key metrics like room rate trends, occupancy, and access to capital, as chain hotels providers trended up while independent hotels saw little to no increase in positive sentiment.

Digital Resilience

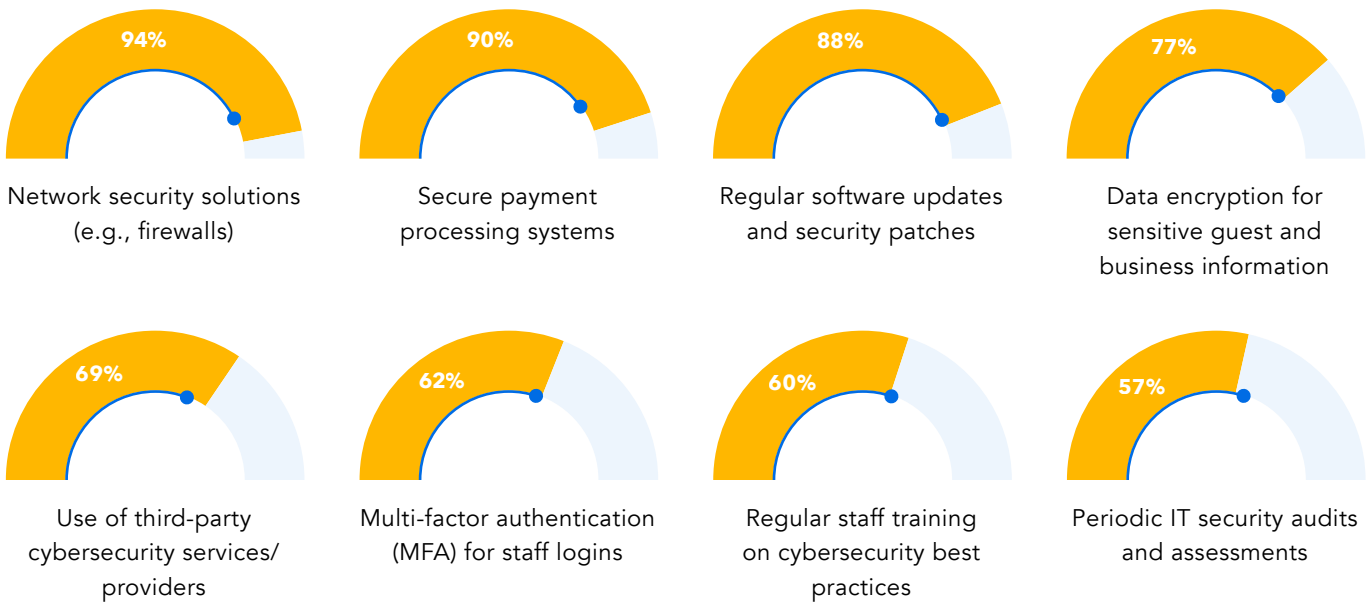
Contextualising cyber risks within the broader operational environment

UK accommodation providers report slightly below-average confidence in their cybersecurity preparedness compared to the EU (63% vs. EU 66%), and also self-report a slightly higher rate of data or cybersecurity incidents in the past 12 months (9% vs. EU 7%). To protect against potential attacks, a largely majority of hoteliers indicated that they implemented network security solutions like firewalls (94%) and secure payment processing (90%) and made regular updates to their software (88%).

















Overall, UK accommodations perform above the EU average across most technical and software-related cybersecurity measures. The rate of adoption falls to under two-thirds on personnel-related measures such as staff training on best practices (60%) and multifactor authentication (62%) but this still sits closely in line with the EU average of 61% and 60%, respectively.



Cybersecurity measures currently in use ● EU average



In 2026, UK hoteliers are most concerned about disruptions to travel and their operating environment. Over a third (38%) name extreme weather conditions among their top three concerns, closely in line with the EU average (37%). Local disruptions, such as transport strikes and construction works, follow at 37% (EU: 32%). Other key worries include payment fraud (30%), IT outages (29%), and property damage or incidents involving guests (28%). Only 19% foresee no major disruptions in the next 12 months.

Top concerns for European accommodation providers in the next 12 months (%)	EU average	Nordics	Ireland	United Kingdom	Netherlands	Germany	Austria	Switzerland	Poland	Hungary	France	Croatia	Italy	Spain	Portugal	Greece
																
Travel disruptions caused by extreme weather or natural events	37	34	43	38	33	34	36	39	41	46	51	42	22	38	35	32
Local disruptions affecting guest access or operations	32	30	29	37	33	29	24	20	46	38	41	27	14	33	31	50
IT outages or failures of digital systems	26	22	36	29	22	34	30	34	38	29	24	24	6	34	21	21
Payment fraud or chargebacks	26	23	23	30	32	19	15	23	30	33	20	34	9	24	32	16
Property damage or operational incidents involving guests or third parties	26	25	31	28	24	12	18	16	30	27	15	27	14	33	27	34
Disruptions or failures involving key suppliers or service providers	24	17	21	27	24	21	12	29	23	33	21	24	6	44	32	21
Cybersecurity or data security incidents	23	24	25	26	28	32	30	30	31	20	16	22	2	26	23	21
Do not foresee any major concerns	16	21	21	19	16	18	19	18	10	16	17	15	18	15	20	4
Other	11	15	6	9	6	13	17	10	4	2	13	5	61*	2	0	18

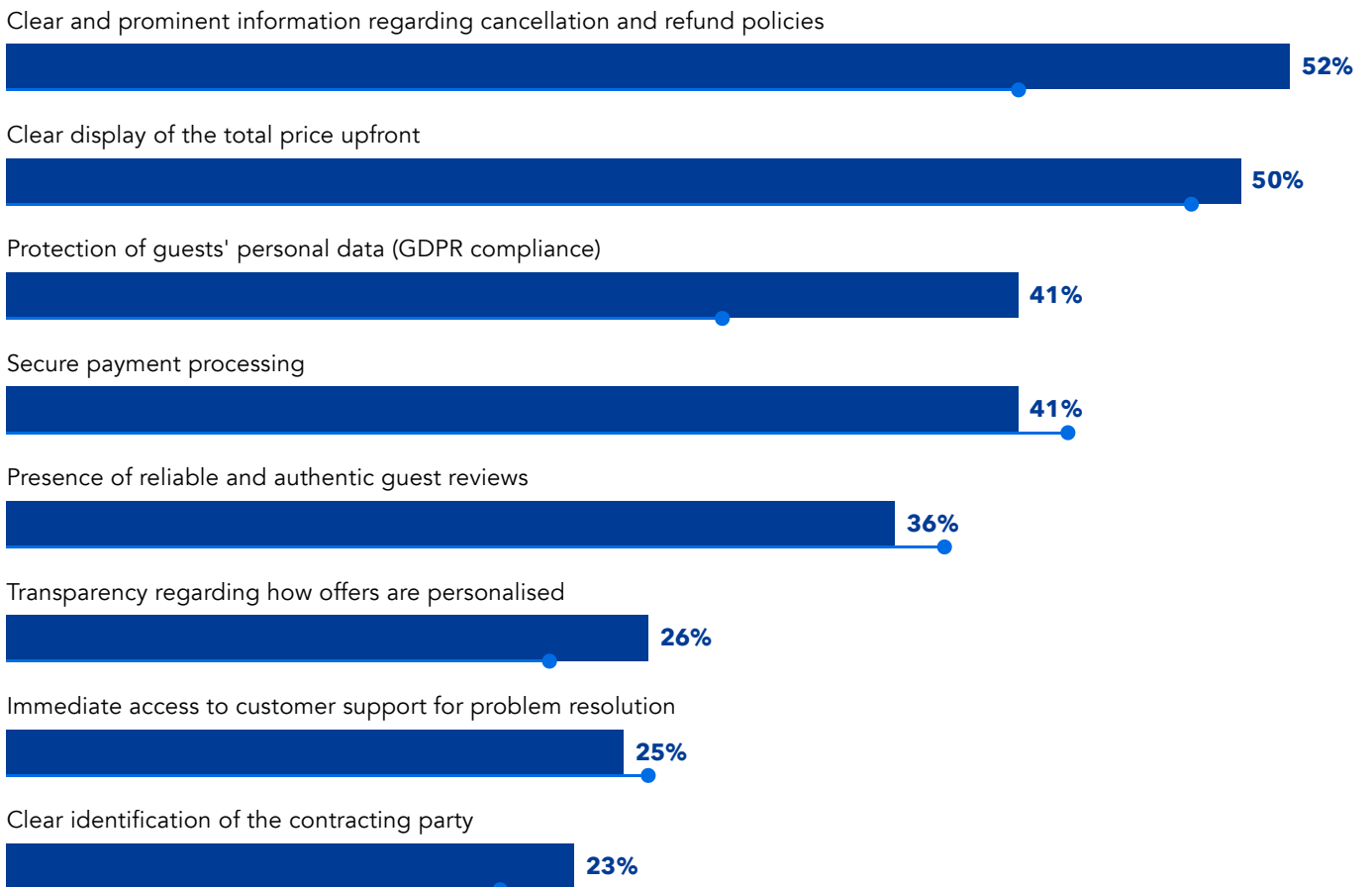
* A large share of Italian respondents chose to give an open answer to this question. Many of these responses related to staffing and the geopolitical/economic climate. See methodology for survey timing and potential impact of geopolitical developments on responses.



Cambridge city centre

Clear and prominent cancellation and refund policies rank among the top three factors for building consumer trust online, according to over half (52%) of UK hoteliers. Other leading factors include the clear display of the total price upfront (50%), GDPR compliance (41%), and secure payment processing (41%), with authentic guest reviews (36%) also ranking highly. Fewer hoteliers consider personalisation transparency, access to customer support, or contracting party identification to be top-tier trust factors.

Most critical factors for building consumer trust for online bookings ● EU average



Seasonality in Travel

Attracting customers in the off-season is never a one-size-fits-all solution

To encourage year-round occupancy, UK hoteliers deploy a mix of digital and pricing-led strategies. Discounting stands out as a clear strategy: three in four (73%) find that special rates and bundled packages deliver results, in line with the EU average (72%). Adjusting booking and cancellation policies is also highly valued, effective for 63% of operators. Digital platform partnerships are also widely used, and effective for 60% of UK hoteliers, though they are more popular with EU accommodation providers (69%). Hosting events and expanding weather-independent amenities see less traction, with over 40% of UK accommodations not pursuing either strategy.



Lake District, Cumbria

Strategies used to mitigate the effects of seasonality

■ We do this and it is very effective ■ We do this, but it is rather not effective ■ We do not do this

Offering special rates, discounts, or bundled packages during off-peak seasons, long weekends or public holidays



Adjusting booking and cancellation policies



Collaborating with digital travel platforms to promote off-season availability



Modifying staff levels and operations to align with seasonal demand patterns



Partnering with local attractions, cultural organisations, or tourism boards to develop year-round offerings



Hosting events, conferences, or retreats to attract non-leisure and group travellers



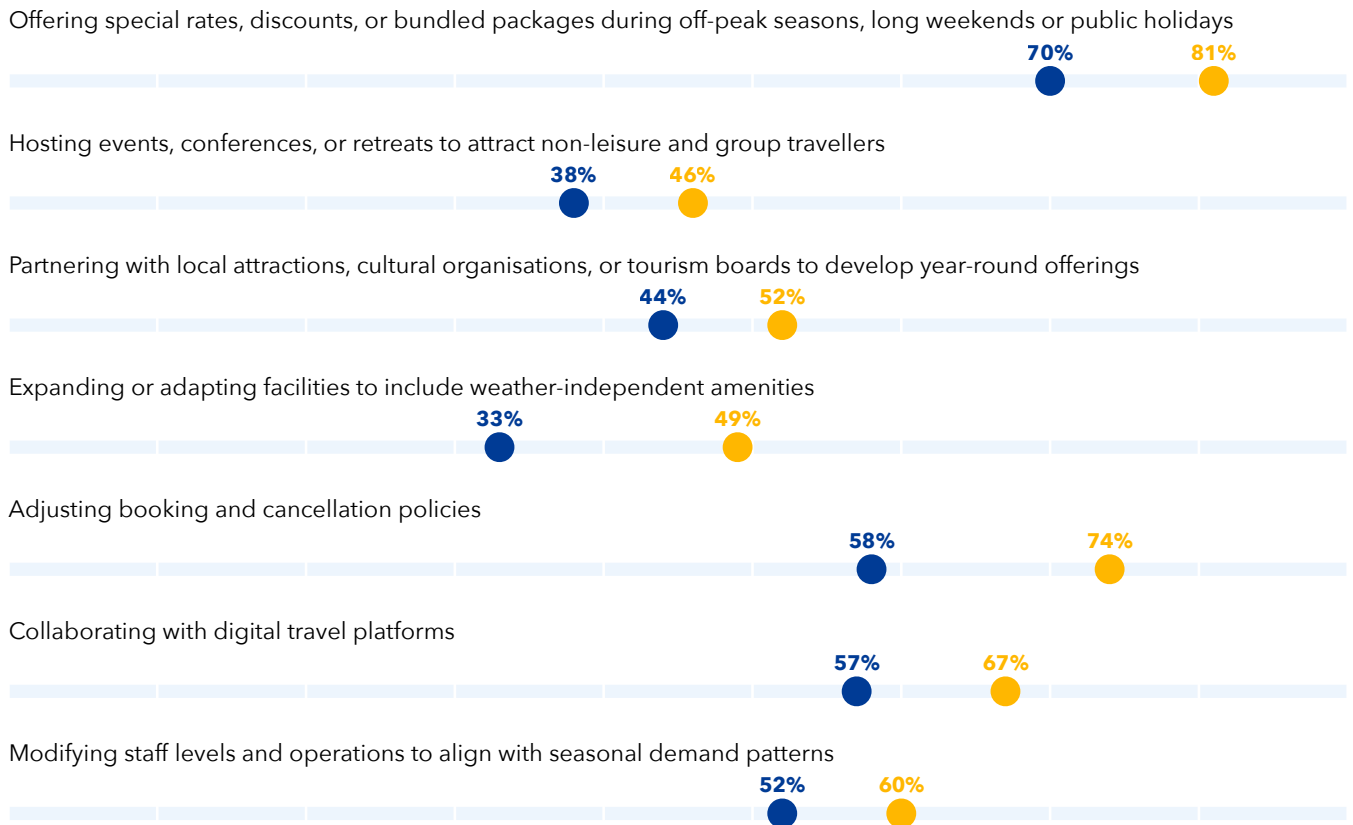
Expanding or adapting facilities to include weather-independent amenities



When comparing approaches to seasonality between chain and independent hotels, chains appear to be more actively managing seasonality with targeted strategies across all categories. Offering special rates, discounts and bundled packages remains the clear frontrunner for both accommodation types (Independents 70% vs. Chains 81%). However, there is a much greater disparity in how accommodations manage booking and cancellation policies, which are used to mitigate the effects of seasonality and considered effective by 58% of Independents compared to around three quarters (74%) of chains.

Strategies used to mitigate the effects of seasonality, by accommodation type

■ Independent hotels ■ Chain hotels



Belfast City Hall, Northern Ireland

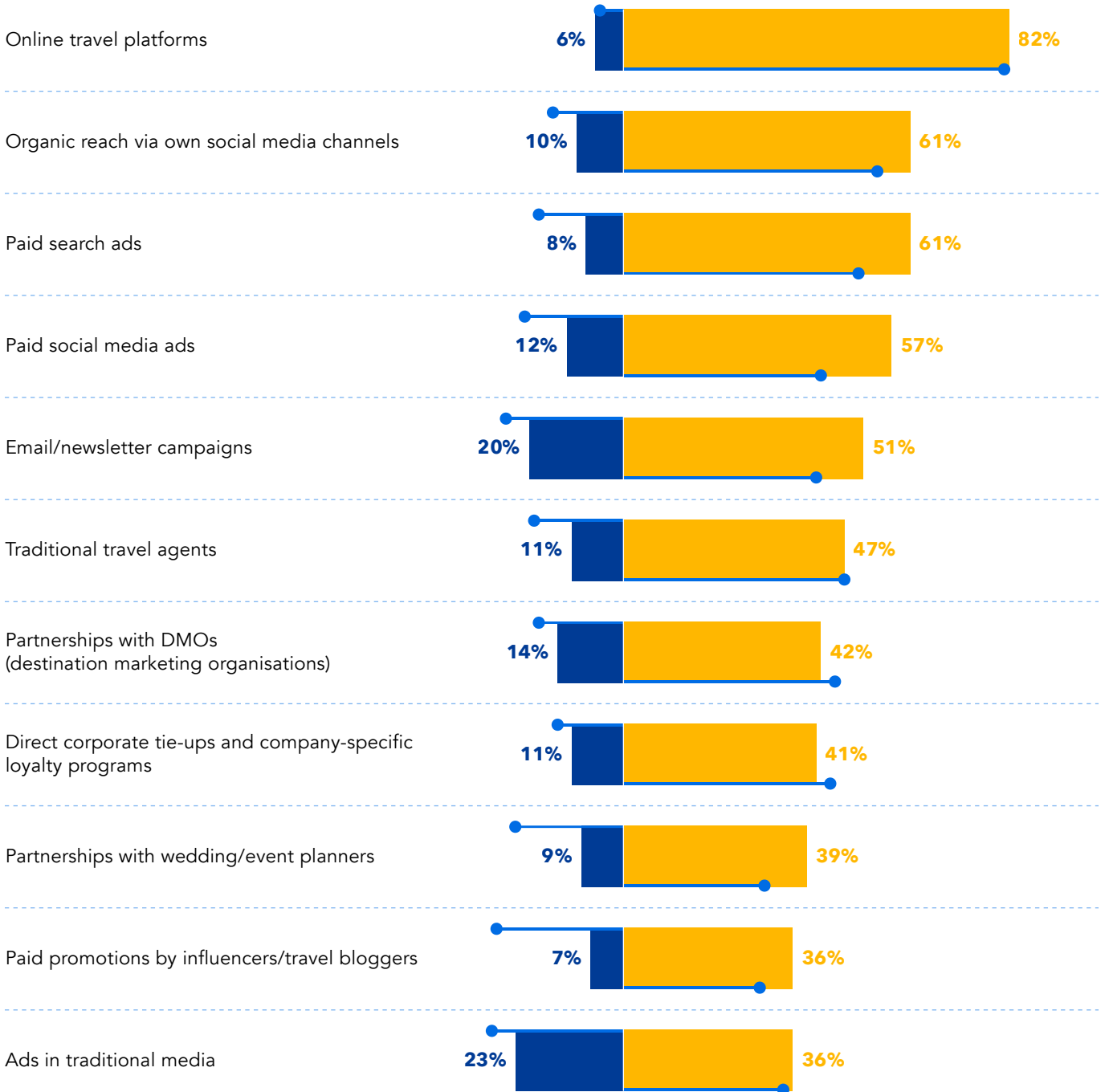


This reflects a broader principle of hotel revenue and channel management: creating off-season demand requires both an attractive offer and an effective route to market. Pricing can make a stay more appealing, but distribution partners and marketing channels are what help put that offer in front of the right audience.

UK accommodations show a notably broad digital channel mix: online travel platforms were rated effective by 82% of hoteliers, followed by paid search ads (61%), organic social media (61%), and paid social media (57%). Even the least-used channels, including paid influencer or travel blogger promotions and advertising in traditional media, are still deemed effective by at least a third of respondents.

Effectiveness of measures to secure off-season stays

■ Not effective (at all) ■ (Very) effective ● EU average



Event-Driven Tourism

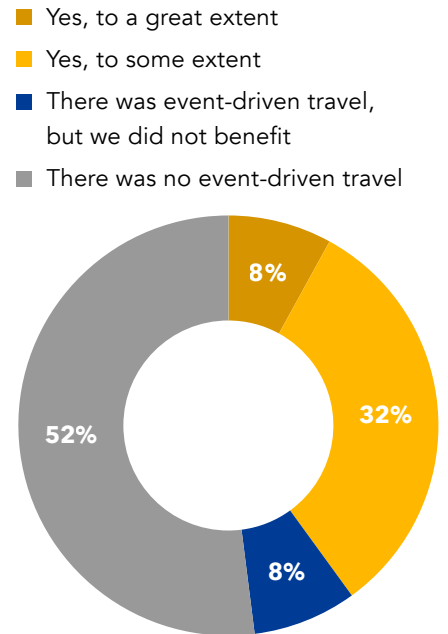
Four in ten UK accommodations benefit from event tourism

48% of UK accommodation businesses indicated that they experienced some form of event-driven tourism in their local area over the past 12 months, and the majority of those were able to benefit from the resulting increase in tourism activity. Half (52%) reported no event-driven travel at all. For those that experienced event-driven travel, improved revenue per room was the leading benefit (68%), while just over half cited increased bookings during typically low-demand periods and roughly half credited events with helping to offset lower revenues at other times of the year.

Conversely, a notable subset identified some negative impacts of event travel such as operational challenges (37%), disruptions to the usual guest mix (26%) and negative impacts on guest satisfaction (14%).

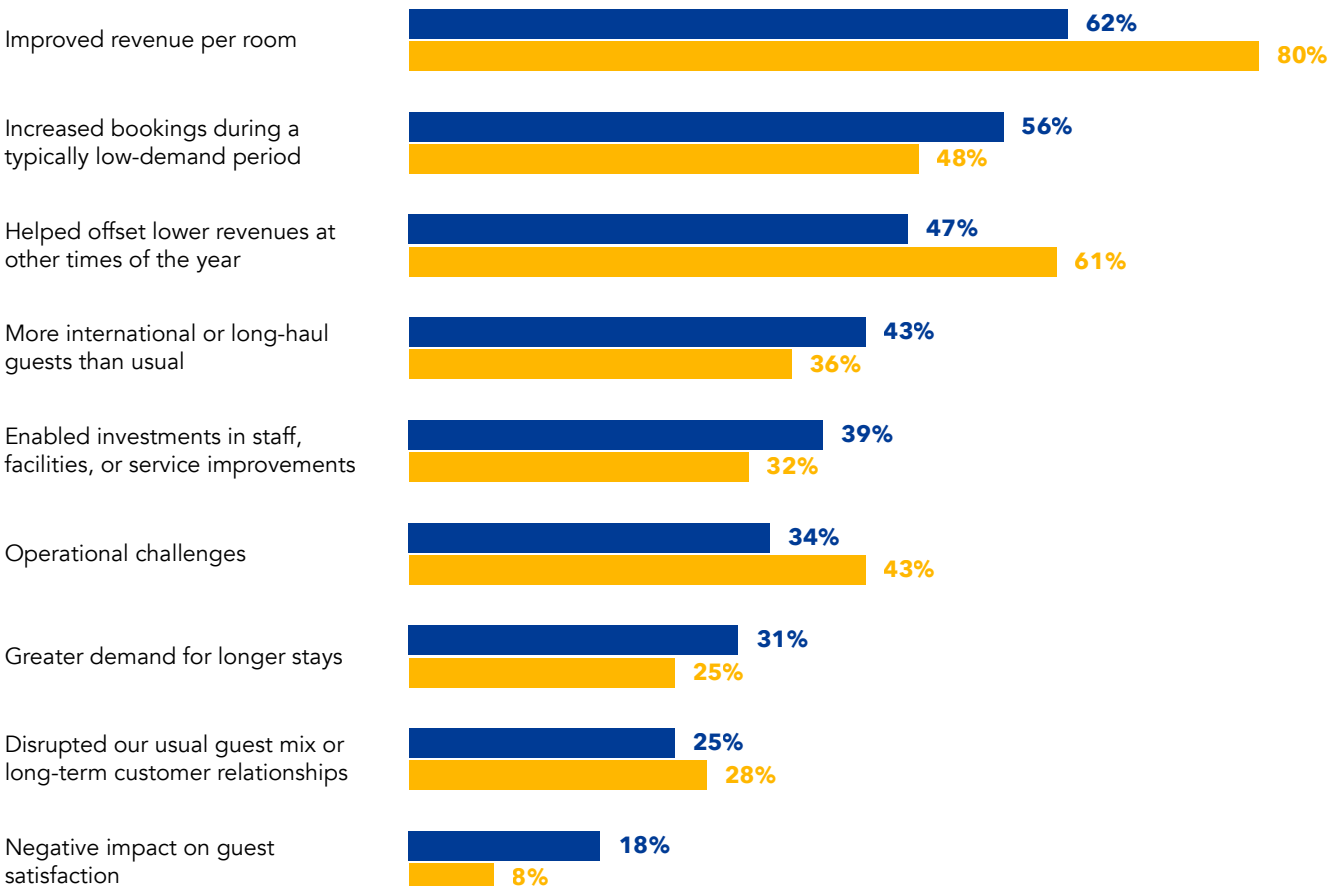
Chain and independent hotels had rather unique results from event-driven travel. Chains benefitted considerably from improved room rates as reported by eight in ten chains compared with around six in ten independents. Yet independent hotels are slightly more likely to benefit from longer stays and more international guests. Taken together, the results suggest that event-driven tourism plays an important but uneven role in the UK market, with benefits concentrated in specific locations and segments rather than broadly distributed across the sector.

Share of accommodations that benefited from major event-driven travel in the last 12 months



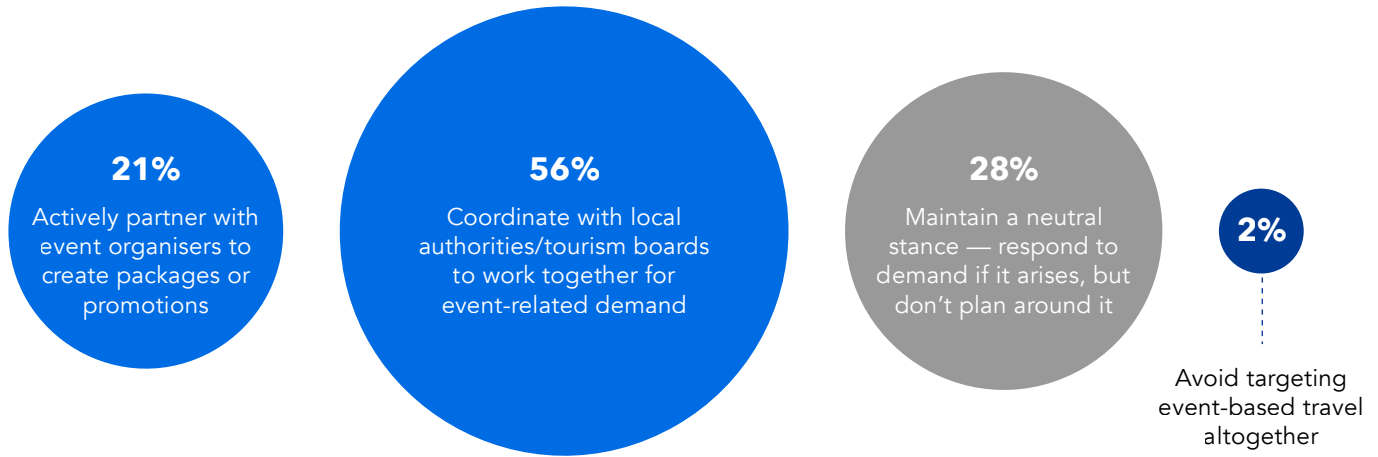
Direct impact of event-driven travel, by accommodation type

■ Independent hotels ■ Chain hotels



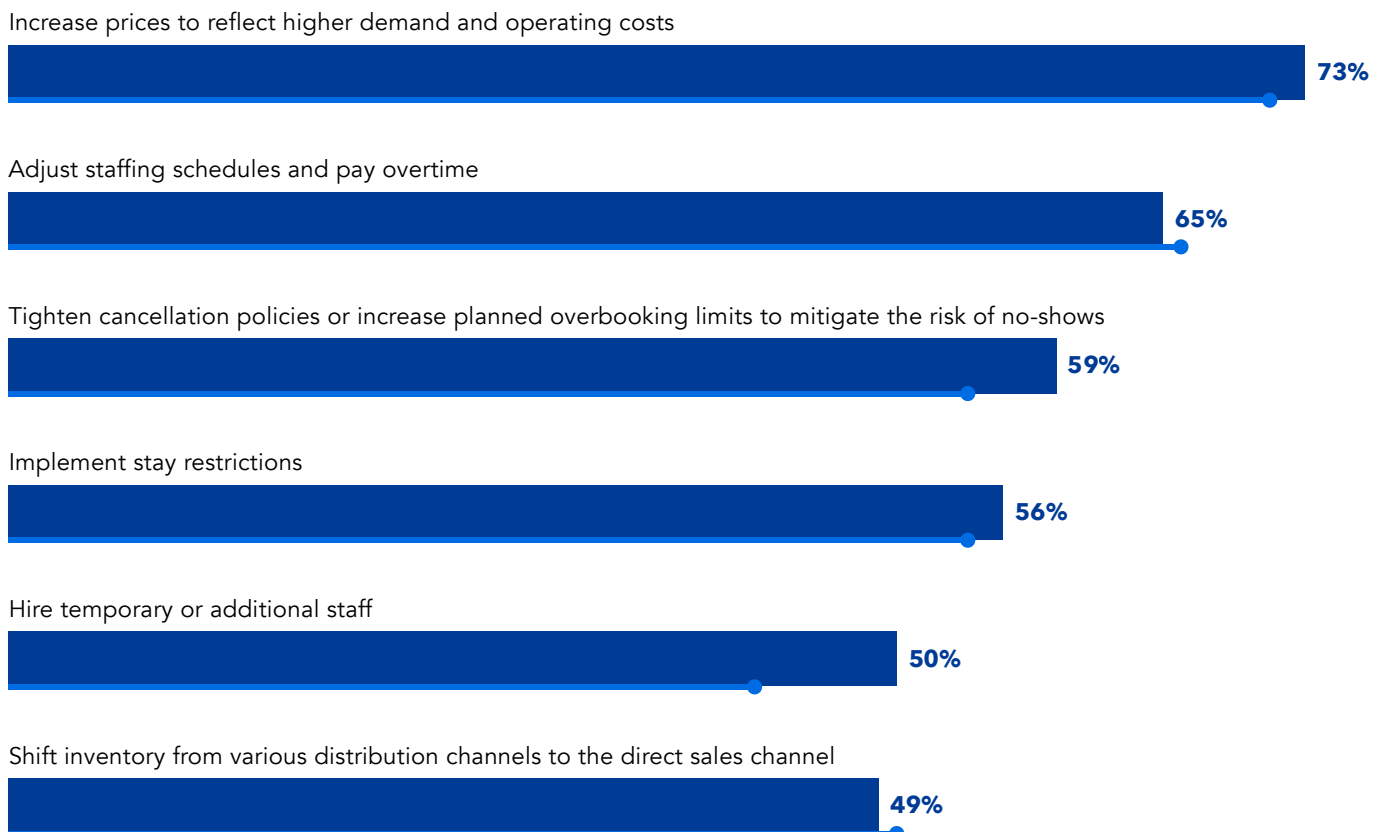
When it comes to local tourism events in the future, over half (56%) of UK hoteliers showed interest in coordinating with local authorities and tourism boards to work together on event-related demand. Just over one in five (21%) would consider actively partnering with event organisers to create packages or promotions, suggesting that overall, UK hoteliers favour coordination with local institutions. Just 2% would avoid event-based travel altogether.

Plans to engage with event-driven tourism in the future



While most accommodations agree that event tourism is beneficial for business, hoteliers also recognise that it requires operational adjustments to meet higher demand and guest expectations. Three in four (73%) increase prices to reflect demand and costs, alongside making staffing adjustments (65%). Over half (56%) implement stay restrictions and half hire temporary or additional staff during events, above the European norm (42%).

Operational adjustments made when a major event takes place ● EU average



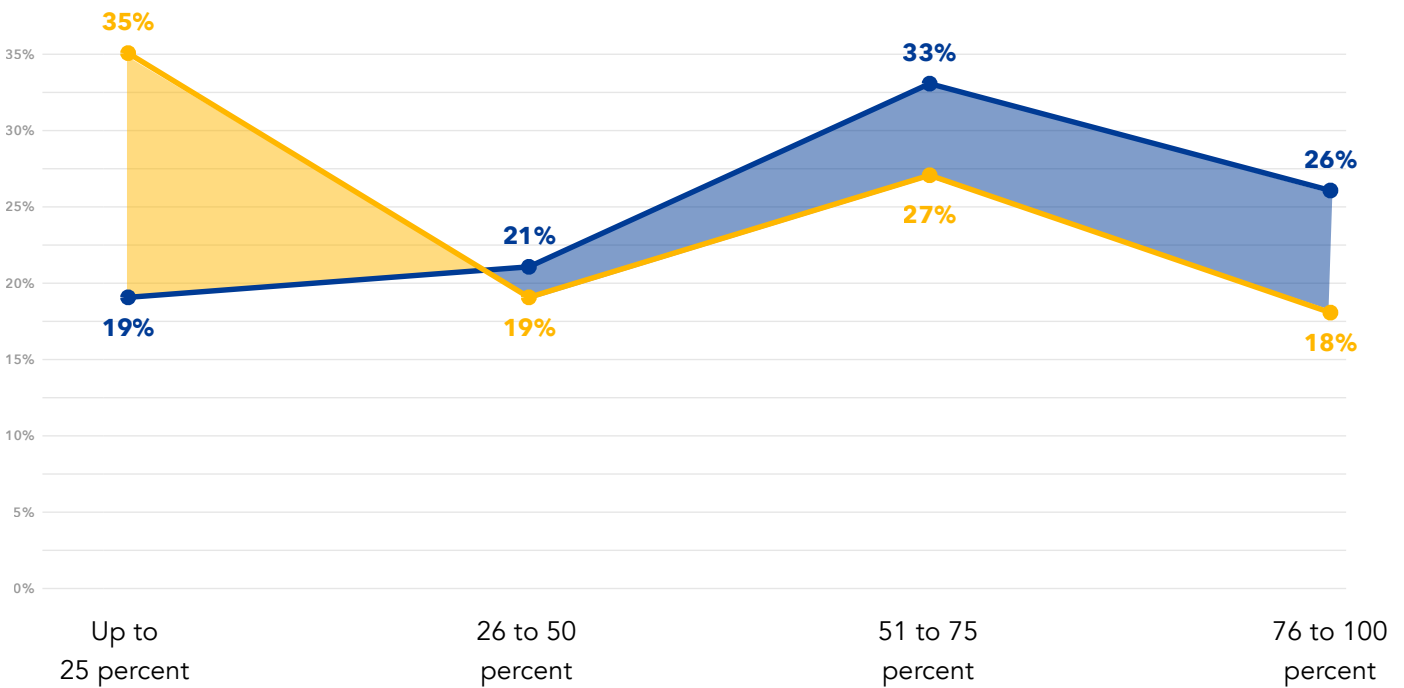
Local Impact

Strong community integration with a broadly distributed supply spend

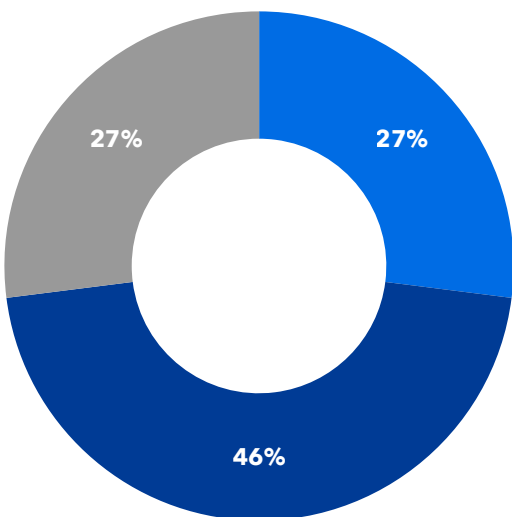
Spending on nearby suppliers varies widely across UK accommodations. Around a quarter (23%) allocate most of their non-labour budgets to local suppliers (76–100%), while 44% spend less than half, highlighting differences in how strongly businesses are tied to their immediate supply base. When spending is broken down by accommodation type, local spending makes up a larger share of independent businesses’ budgets than those of chains.

Share of non-labour operating budget spent on local vendors and suppliers

■ Independent hotels ■ Chain hotels



In addition to their investment in local services, nearly half (46%) of UK accommodations have facilities that are open for use by locals, such as restaurants, meeting rooms, and fitness areas. Hotel facilities that are open to the public can be mutually beneficial to accommodations and the local community, bringing additional income to the business while expanding on activities available to locals.



Usage of accommodation facilities by non-guest local residents

- Used exclusively by hotel guests
- Used by both hotel guests and local residents
- We do not offer such facilities

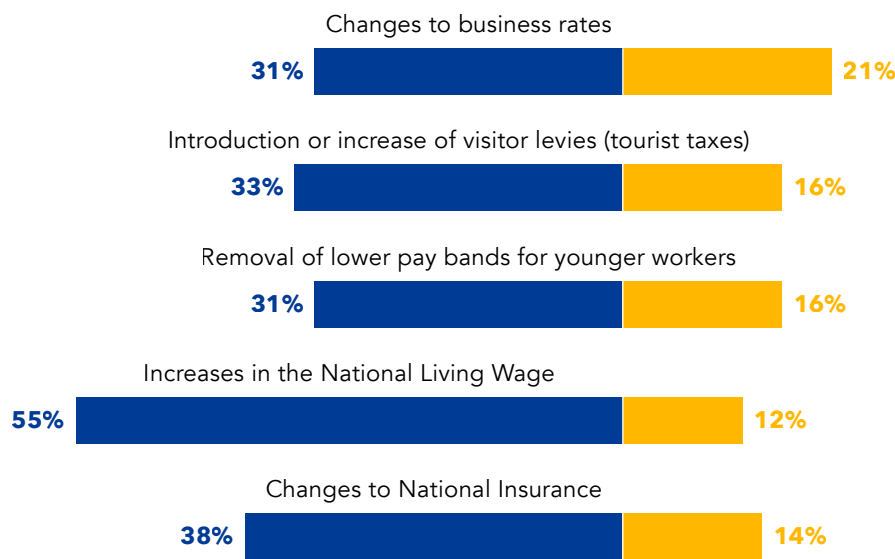
Policy and Regulatory Context

Survey responses suggest recent changes to labour and tax policy have contributed to rising cost pressures for UK accommodation operators. Since April 2025, increases to National Insurance and National Living Wage have added to operating costs across the sector.

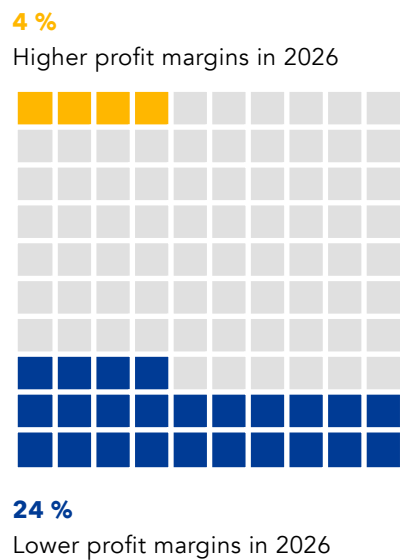
Over half (55%) of hoteliers reported the National Living Wage increase has had a negative impact on their business compared to just 12% who have experienced positive outcomes from the policy change. Fewer hoteliers flagged a negative impact from changes to the National Insurance (38%), though, these responses still outweighed positive impacts by almost three to one.

Impact of regulatory and policy changes in the past 12 months

■ (Very) negative ■ (Very) positive



Expectations for 2026 compared with 2025



Elegug Stacks, Pembrokeshire Coast National Park, Wales

Overall, UK accommodations were more likely to report downside than upside effects from the policy shifts assessed in the Barometer. That said, changes to business rates saw the most support with 21% declaring that the policy has had a positive or very positive impact on their business.

Profit margin expectations highlight the cumulative pressure, with roughly six hoteliers expecting a decline for every one anticipating an improvement. While two thirds (67%) anticipate broadly stable margins, nearly a quarter (24%) foresee a decline and only 4% expect an increase.

Methodology

The 2026 survey was conducted by Statista and took place between February 5th and March 24th, via telephone interviews. 1,240 executives and managers from the European travel accommodation sector participated in the survey. 200 respondents from the UK were interviewed. Around half of the interviews were completed before conflict in the Middle East began on February 28th, 2026 and the other half were interviewed after this date. This context should be considered when interpreting the data.

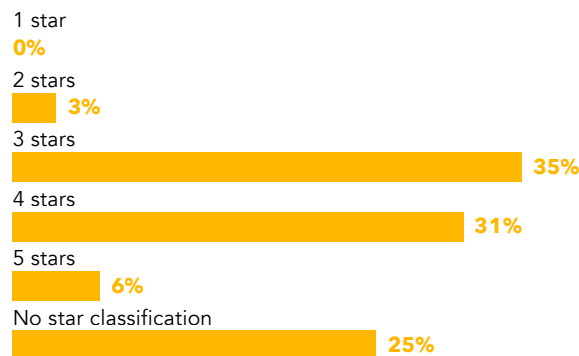
- 2025 survey: February 24th to April 22nd, 1,160 respondents, 200 from the UK.
- 2024 survey: February 6th to March 22nd, 920 respondents, 200 from the UK.
- 2023 survey: March 28th to May 15th, 920 respondents, 200 from the UK.
- 2022 survey: August 15th to October 21st, 1,000 respondents, 200 from the UK.



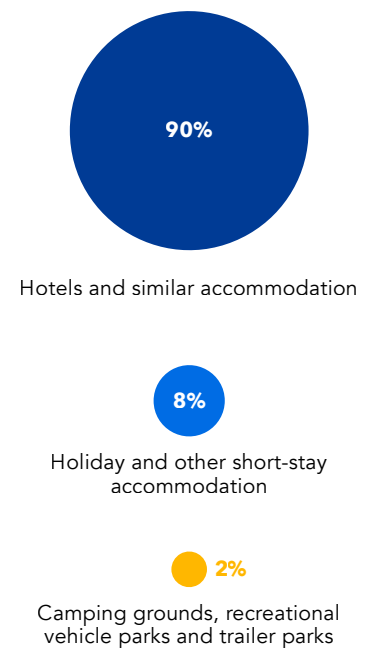
Business type



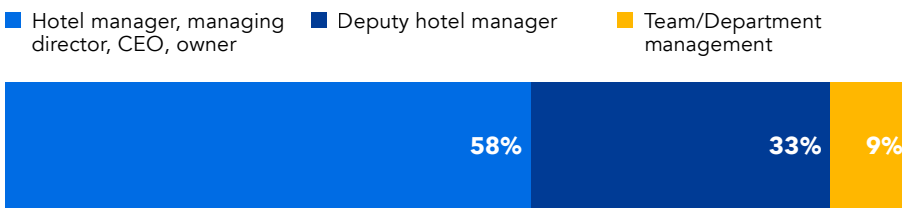
Star classification



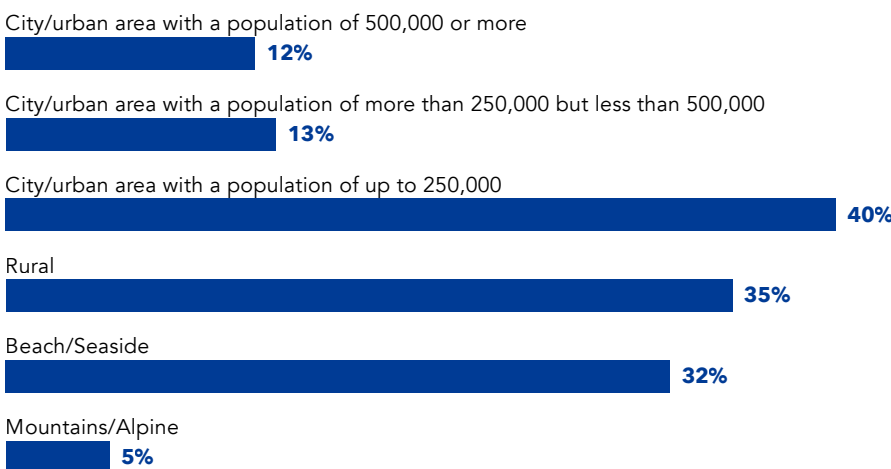
Accommodation type*



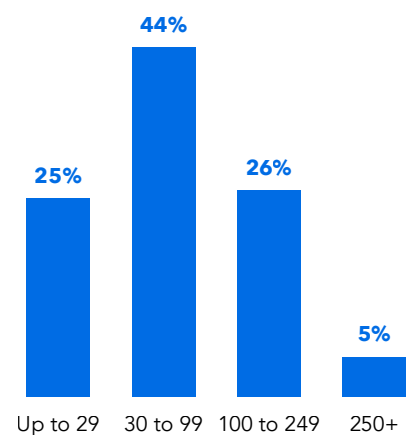
Position



Accommodation location (multiple answers are possible)



Number of beds



* The 2026 sample includes a higher share of alternative accommodations compared to previous years (Hotels and similar accommodation: 66%, Holiday and other short-stay accommodation: 29%, Campgrounds and similar: 6%). To ensure comparability over time, results have been weighted to align with the distribution used in previous editions.