



Pub Accommodation Review 2025

Exclusive research into consumer and operator sentiment from CGA by NIQ and Stay in a Pub, in partnership with Zonal and VisitEngland.





The Pub Accommodation Review
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Stuart Derricott, Sales Director,
Zonal Hotel Solutions



"The Pub Accommodation Review highlights the huge potential of pub accommodation in the UK and clearly demonstrates the special appeal of pubs as overnight destinations.

"From the friendly welcome, to quality food and drink, to location, and value for money, a stay in a pub is something that simply can't be beaten for many guests and there is significant potential for growth in the sector.

"In order to fully capitalise on this, operators should look to optimise their online presence, with the research showing that decisions are increasingly made via search engines and online travel agents. With more than half of consumers saying complicated booking systems deter them from making a reservation, a simple, easy-to-navigate booking journey is also a must for operators looking to tap into the opportunity."

Pub accommodation:
Ten key numbers

2.9

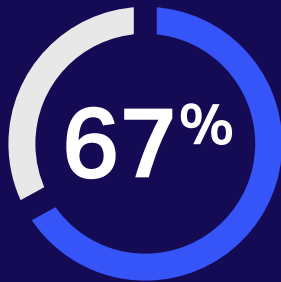
Average number of
pub stays in the last
24 months

1.9

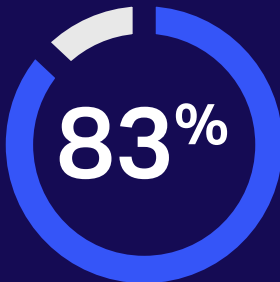
Average number of nights
stayed by consumers in
recent trips

£106

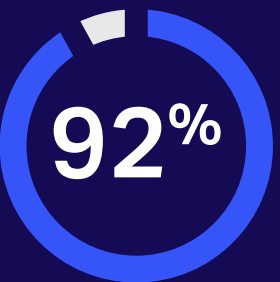
Average nightly spend on
accommodation during
their last pub stay



Of consumers think pubs
provide a better range of
food and drink than any
other accommodation type



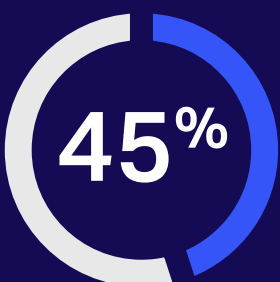
Of consumers say they are
looking for comfortable
and clean rooms in
pubs—their top priority



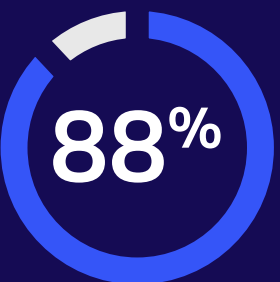
Of consumers say reviews
are important in their
booking decisions



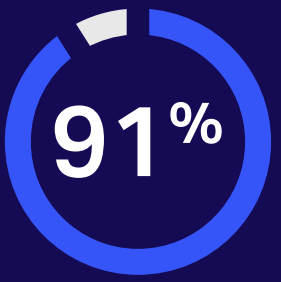
Of consumers don't think
pub accommodation is
easy to find and book



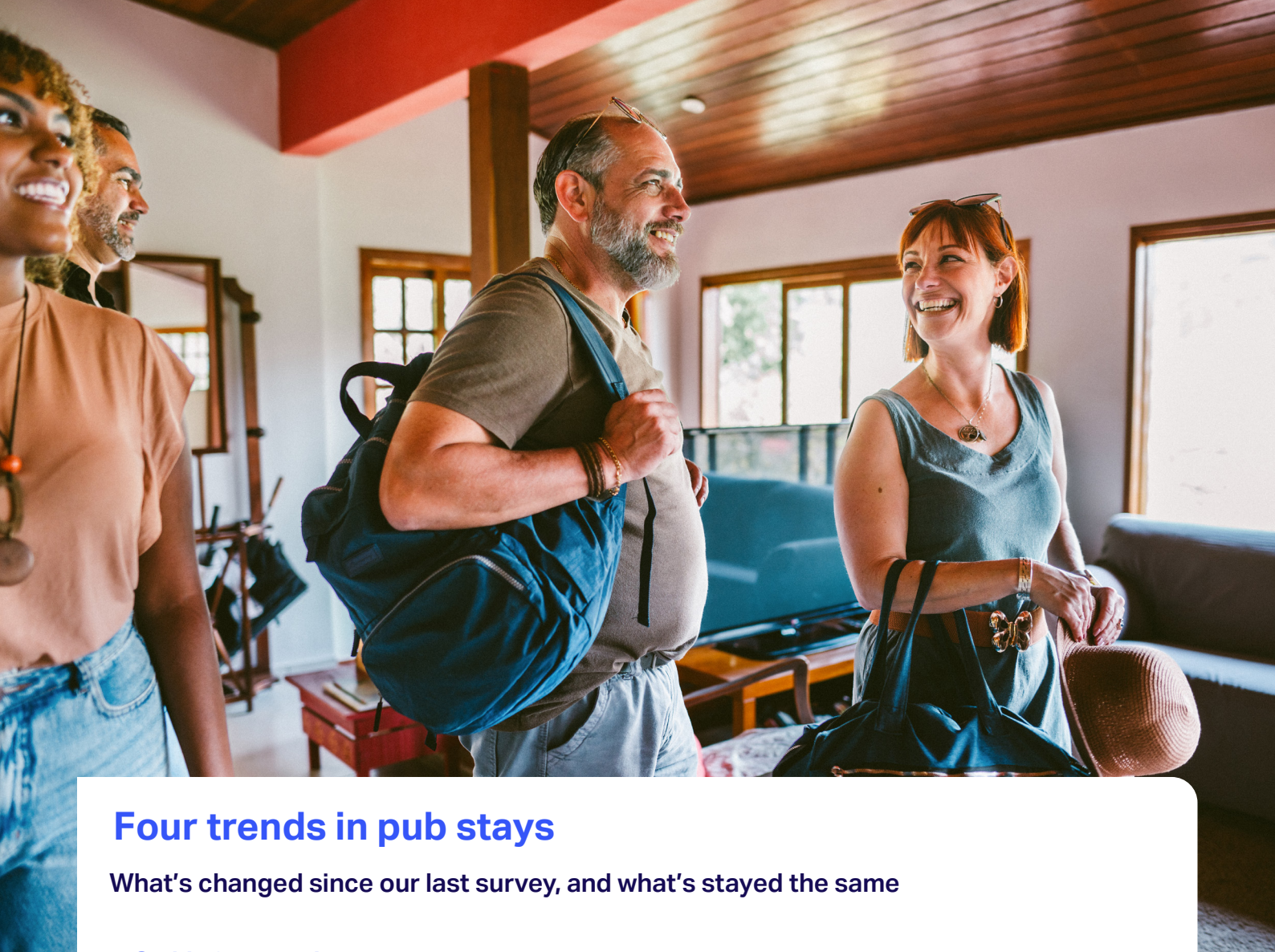
Of pub operators are
optimistic about the pub
accommodation market
over the next year



Of operators say rising
operational costs are a
major challenge



Of operators say a cut in VAT for
hospitality would help them grow
their accommodation trade—their
top priority for government



Four trends in pub stays

What's changed since our last survey, and what's stayed the same

1. Stable frequencies...

The frequency of consumers' stays in pubs has been steady. Survey respondents have stayed in pub accommodation an average of **2.9** times in the last 24 months—exactly the same as at the time of the last survey in 2023. Over that period, stays in hotels and camping accommodation have risen slightly, while B&B stays have dropped fractionally. As with pubs, the frequency of visits to self-catering accommodation is unchanged.

2 ... But shorter stays

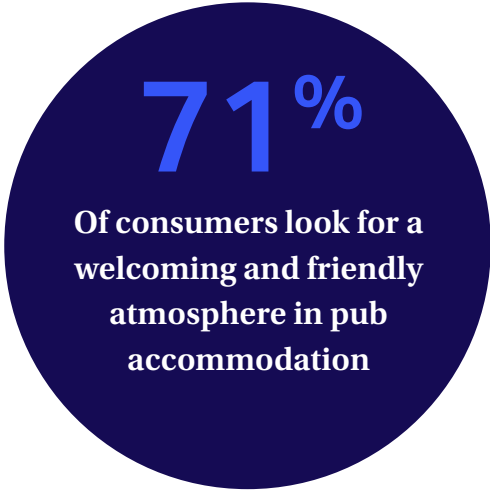
While consumers are staying in pubs just as often, they are making slightly shorter trips. Just over a third (35%) said they stayed only one night on their last visit—sharply up from **24%** two years ago—while the number staying three or more nights has fallen from **29%** to **20%**. It means the average length of stay has dipped from 2.2 to 1.9 nights. This reflects a wider trend in hospitality during the cost of living crisis: of consumers continuing to want to enjoy food, drink and overnight stays, but accepting that they need to watch their budget.

3. Rising spend

Consumers' average nightly spend on stays is £106 - an increase since 2023 of **5.0%** and **7.1%** for leisure and specific event stays respectively. However, this is largely due to price rises rather than higher consumer confidence. It's also slightly below the jump in operating costs for pubs in the last two years, which suggests operators have had to absorb some inflation into their margins.

4. A wider variety of visits

Pubs cater for a very broad range of occasions, and all of them have bounced back well from the disruption of the COVID-19 pandemic. Short breaks remain the most popular reason to stay in a pub, and **70%** of consumers have done so in the last 24 months—up from 58% in the last survey which included a recall period impacted by COVID lockdowns. Fewer consumers use pub stays to visit friends or family (**23%**), for a change of scenery (**16%**) and sightseeing (**15%**), or for special occasions like celebrations (**15%**) and birthdays (**14%**). The last shadows of COVID concerns have gone and consumers are seeking a more varied range of pub experiences than ever.



Who's staying in pubs?

A breakdown of survey respondents shows how use of pub accommodation tilts towards older people. A third (**34%**) of those staying in pubs or interested in doing so are aged 55 to 64, and nearly as many (**31%**) are 65 or over, while just **5%** are aged 18 to 34. Pub stayers are split evenly by gender and have a wide range of household incomes, though around a third (**32%**) take home more than £50,000.



What are you looking for when staying in pub accommodation?

1. Comfortable and clean rooms (**83%**)
2. Good value for money (**81%**)
3. Free parking (**73%**)
4. Welcoming and friendly atmosphere (**71%**)
5. Convenient location (**65%**)
6. High quality food and drink (**63%**)
7. Relaxed and informal environment (**53%**)
8. Proximity to local attractions and activities (**42%**)
9. Outdoor spaces like beer gardens and views (**32%**)
10. Flexible check-in and check-out (**30%**)



Five things that make pub stays special

Why consumers choose pubs over other accommodation options

The Pub Accommodation Review shows the special appeal of pubs as overnight destinations—and the unique characteristics that can encourage even more people to visit. Here are five of their most valuable assets.

1. Atmosphere

Consumers know that pubs provide an experience they can't get elsewhere. When asked about what pubs do better than other types of accommodation, the top three choices—a more traditional and historic charm (53%), a more relaxed and informal environment (53%) and a friendlier atmosphere (50%)—all relate to their special ambiance and feel.

2. Food

The quality of food can give pubs a big head start when people choose their accommodation. It's often perceived to be of better standard and value than hotel restaurants, and provides a big advantage over self-catering options. Two thirds (67%) of consumers rank pubs as providing the best range of food and drink of any accommodation type—more than double the number (30%) who rate hotels best.

3. Value

While pubs sometimes lose out to budget hotel chains in consumers' choices, perceptions of their value are usually high. Just over two in five (42%) think pubs offer better value for money than other types of accommodation, and it sits behind only camping in consumers' rankings of the best-value stays.

4. Local

Consumers know that pubs are often at the heart of the places they want to visit. Two fifths (39%) think they offer a more authentic local experience than other types of accommodation, and nearly as many (35%) say they have better connections to local communities. Pub staff have a big role to play in linking people with communities, as more than three quarters (78%) of consumers are likely to seek local information and recommendations during their stays.

5. Welcome

Many consumers feel they're likely to get a warmer welcome at pubs than elsewhere. Four in five (79%) of those who choose pub accommodation say expectations of friendly and welcoming staff would encourage them to stay—a higher number than other key factors like parking (76%), location (66%) or discounts (62%).

39%

Of consumers say pubs provide a more authentic local experience than other types of accommodation

42%

Of consumers think pubs offer better value for money than any other accommodation type

... And five issues to address

While pubs have many unique selling points, some negative perceptions persist. When asked about what would discourage them to choose pub accommodation, three factors stand out: shared bathrooms (77%), noisy locations (66%) and cleanliness issues (64%). Other concerns include a lack of privacy (33%) and small room sizes (28%).

Some of these perceptions are based on outdated stereotypes of pub accommodation. Several, like location and building size, are beyond operators' control. Nevertheless, addressing standards of comfort and cleanliness—in both day-to-day operations and general marketing—could turn some pub rejectors into regular guests.



Reaching more guests

How pubs can win eyeballs and earn stays

In a very competitive accommodation sector, the visibility and reputation of pubs with rooms are more important than ever. The Pub Accommodation Review reveals what operators can do to optimise them at three key stages of the journey: discovery, decision-making and booking.

Discovering

The survey shows how guests' decisions are increasingly made online. More than a third (36%) of consumers found their last accommodation via a search engine, while 27% used an online travel agent—an increase of 5 percentage points since 2023.

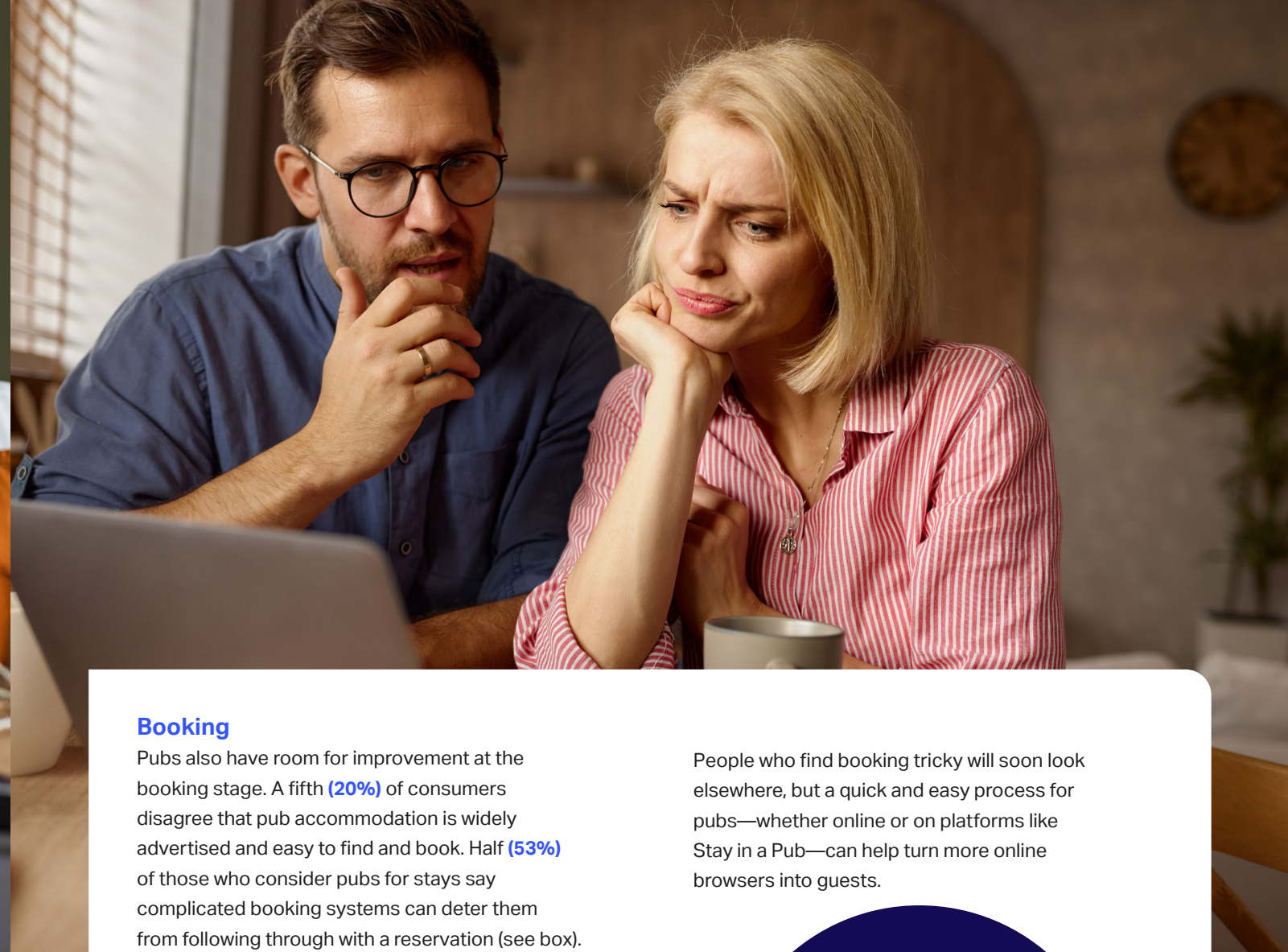
However, there is room to increase visibility on Google and elsewhere. Search engine optimisation can be a big help, but only a quarter (25%) of operators currently use it as a marketing method, and even fewer (11%) invest in paid search strategies like Google Ads. Both numbers have dropped in the last two years—probably the result of budget constraints. Operators are much more likely to use social media as a marketing method, and more than two thirds (70%) do so now. Promotion on third party platforms like Stay in a Pub can be a very effective way to increase prominence and broaden reach.

Deciding

More than nine in ten (92%) consumers say reviews and comments are important in their decision to book rooms, and nearly three in four (73%) can be deterred from booking by negative online reviews. They are particularly influential among younger adults who have grown up accustomed to online discovery and review platforms like TripAdvisor.

This highlights the need for operators to generate positive reviews. Formal accreditations can help too, and nearly three quarters (73%) of consumers say official star ratings are important in their decision-making. And the human touch is vital, with well over half (58%) of guests who have a positive interaction with pub staff likely to leave a review on sites like TripAdvisor.

There's also a clear need to respond to negative reviews and turn unsatisfied guests into advocates, though far from all operators do so—usually because they prefer to handle issues offline, or don't see the value of engaging online. This is a risky strategy, because complaints with no responses can live for a long time on review platforms.



Booking

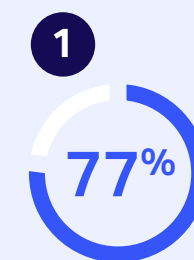
Pubs also have room for improvement at the booking stage. A fifth (20%) of consumers disagree that pub accommodation is widely advertised and easy to find and book. Half (53%) of those who consider pubs for stays say complicated booking systems can deter them from following through with a reservation (see box). It's a particularly common problem for 18 to 34 year-olds, as well over a third (38%) of these say they don't know how to book a stay at pubs.

People who find booking tricky will soon look elsewhere, but a quick and easy process for pubs—whether online or on platforms like Stay in a Pub—can help turn more online browsers into guests.

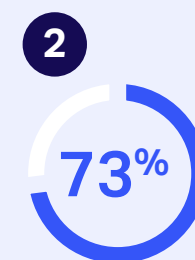
73%
Of consumers say official star ratings are important in their decision-making

Booking barriers

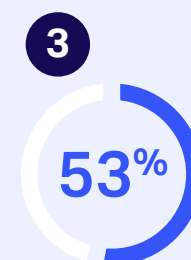
Which of these factors could deter you from booking pub accommodation?



Overpriced



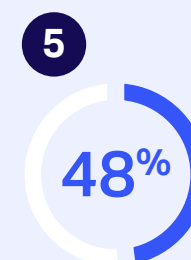
Negative online reviews



Complicated booking systems



Low quality property pictures



Brief property description

Views from the top

The cautious confidence of pub accommodation business despite challenges

A sturdy 12 months for pub accommodation has left leaders feeling reasonably confident about future prospects. Surveys with operators as part of the Pub Accommodation Review found that nearly half were either very optimistic (12%) or fairly optimistic (33%) about prospects for their market over the next 12 months.

This is significantly higher than the number feeling pessimistic (27%), and well above the confidence levels of hospitality as a whole. CGA by NIQ's April 2025 Business Confidence Survey found that only a third (33%) of all hospitality leaders felt optimistic about prospects for their business over the next 12 months—the lowest number since late 2022.

Reasons to be cheerful

Optimism has been fuelled by solid sales growth for many operators. Two thirds say their accommodation revenue is higher (43%) or the same (24%) as a year ago, and 56% expect it to grow in the next year.

It has also partly been lifted by increases in prices that offset operators' increased costs. Survey respondents' average room rates are £133 and £110 in high and low season respectively, and both figures have risen by more than 8% in the last two years. The average price of meals has climbed even faster: by 12% to £11.96 for breakfast, and 10% to £38.86 for a three-course evening meal.

Big challenges

While the general mood in pub accommodation is fairly confident, there are plenty of challenges too (see box). Most of them are economic - especially through rising operational costs and a squeeze on consumers' spending. An easing of inflation should help on both these fronts, but further cost increases are inevitable in some areas. Increases in labour bills, especially through hikes in National Insurance contributions from April, have dealt a particularly heavy blow to confidence.

The Pub Accommodation Review reflects several watchouts that are seen across other CGA by NIQ data sources. The CGA RSM Hospitality Business Tracker shows that among managed groups, occupancy rates

were slightly lower in 2024 than in 2023—and by as much as 5 and 4 percentage points in June and July. Accordingly, in the survey nearly half (47%) of operators report that low season occupancy rates have been lower than 12 months ago, while only 26% say they are higher. Their average stay duration has dropped by 3.3% in two years, to 2.16 nights.

The Tracker also shows rooms accounted for around a fifth of pub operators' revenues throughout most of 2024, but it dipped to between 12% and 14% in December, January and February. Whether these are blips or the start of longer trends remains to be seen, but it is a reminder that consumers' accommodation spend can't be taken for granted.

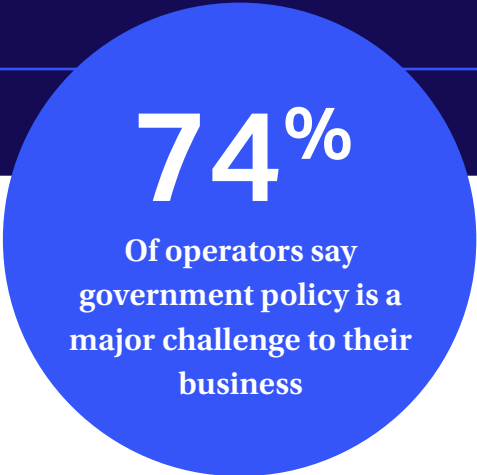
Solving these challenges isn't easy. But with 74% of operators considering government policy a major challenge, there are clearly powerful things that authorities could do to help, like cutting VAT for hospitality, reducing other financial burdens and capping energy prices. There are other effective ways to back accommodation businesses too, like increasing consumer awareness through media coverage and dedicated websites, that both the industry and government can get behind. (see box).



The top challenges

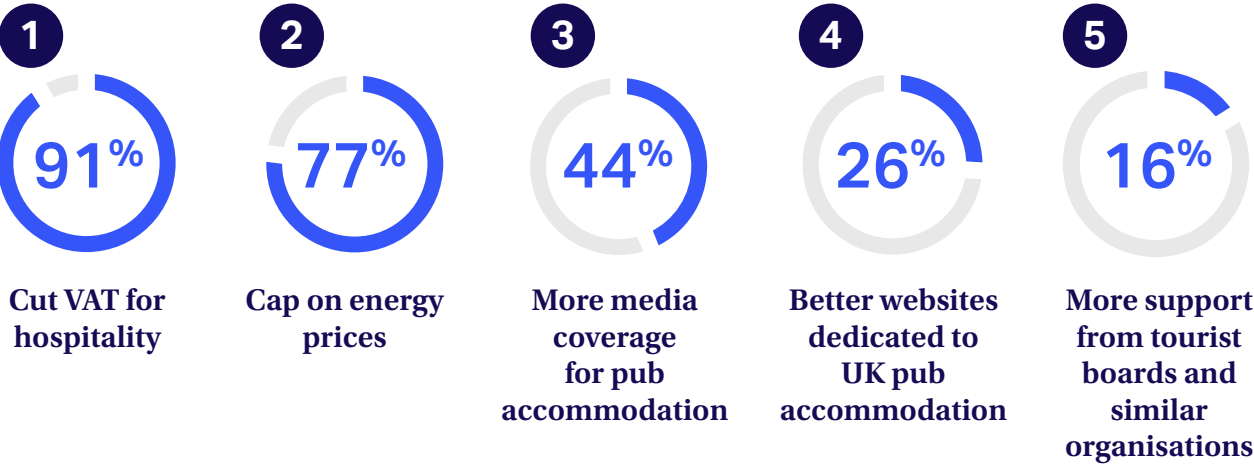
What do you think are the biggest challenges for the pub accommodation sector?

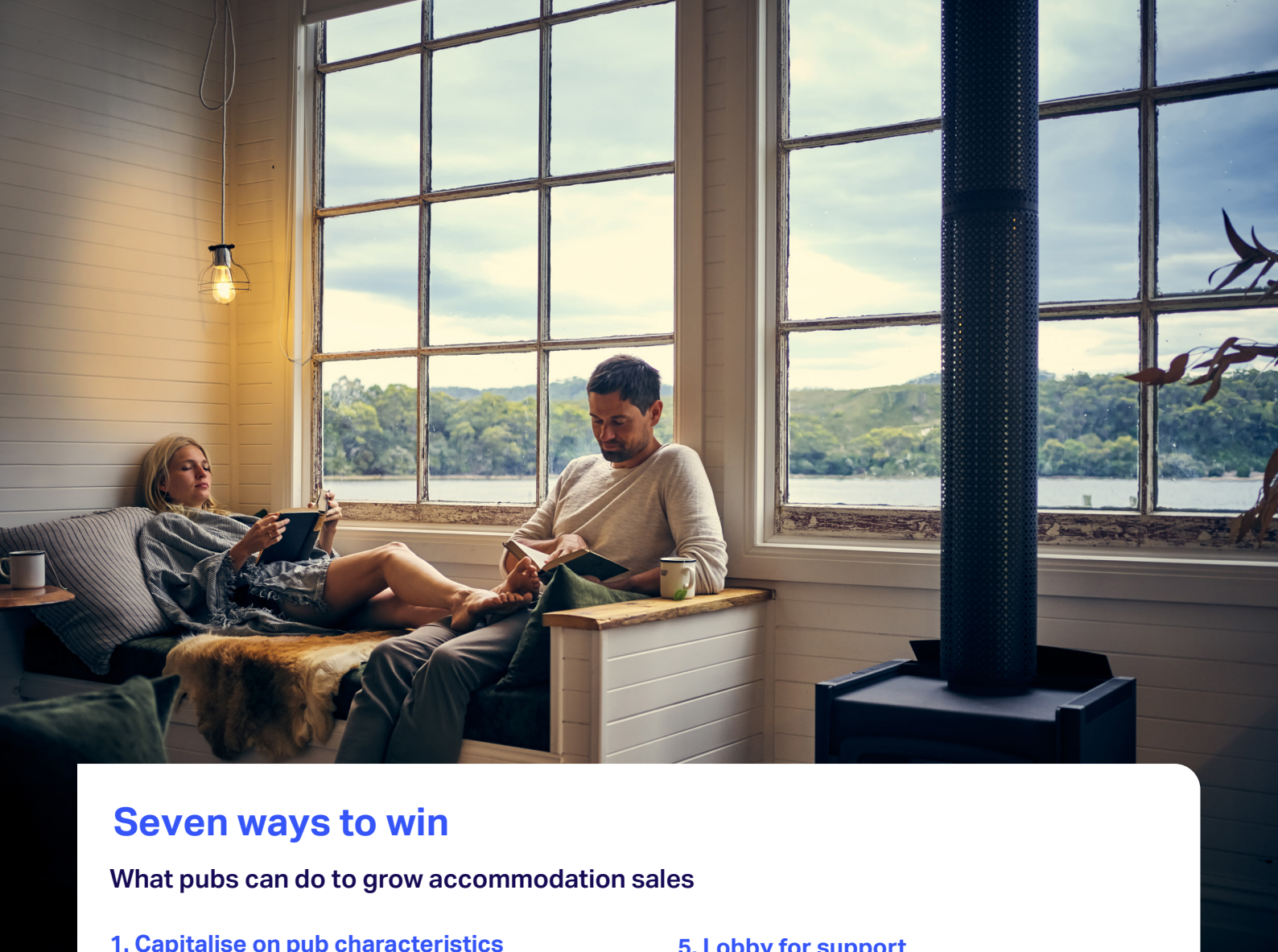
- 1. Rising operational costs (88%)
- 2. Economic pressures on consumer spending (75%)
- 3. Government policy (74%)
- 4. Attracting and retaining skilled staff (63%)
- 5. Competing with larger chains (51%)
- 6. Managing guest expectations (47%)
- 7= Maintaining appeal for younger generations (42%)
- 7= Compliance with regulations (42%)
- 7= Maintaining consistent standards (42%)
- 10. Keeping up with food, drink and entertainment trends (35%)



Government wish list

What would most help your pub to grow its accommodation sales?





Seven ways to win

What pubs can do to grow accommodation sales

1. Capitalise on pub characteristics

Pub accommodation has an exceptionally wide appeal and characteristics that can't be found anywhere else. While there are short-term challenges, investment in pub rooms is likely to be well rewarded in the long term.

2. Play to local strengths

Pubs have unique connections to their communities that guests really value. Emphasising these in marketing and using staff to share their local knowledge can create a competitive edge over hotels and self-catering.

3. Improve discoverability

Pubs' widespread appeal isn't yet matched by its online visibility. Search Engine Optimisation, social media activity and collective pub promotions are needed to convert more browsers.

4. Focus on value

With so many consumers still facing rising costs, pubs' reputation as good value options is a big strength. But it's important to remember that value doesn't necessarily mean cheap—just worth the price that is being paid.

5. Lobby for support

Amid economic challenges, pubs need better government support to grow their accommodation revenue. Cross-industry campaigns for relief on VAT, rates and labour costs are essential.

6. Reach younger consumers

The demographics of pub guests is heavily skewed towards older people at the moment. Appealing to younger professionals and families can diversity appeal and create pub champions of the future.

7. Make it easier to book

Too many consumers don't find it easy to book pub rooms. Providing simple and fast reservations, and championing one-stop platforms like Stay in a Pub, can pull more people towards pubs.

In guests' own words

If the price and location were the same, why would you choose to stay in a pub over other options?



About the research

Unless otherwise stated, data in this report is taken from two exclusive surveys by CGA and NIQ and Stay in a Pub: a survey of the behaviours, preferences and of expectations 4,308 consumers, of whom 49% have stayed in pub accommodation in the past 24 months, and 51% who have not yet but are open to doing so; and a survey of operators who offer pub accommodation to the UK public or are thinking about doing so. The research was conducted in February and March 2025. Comparisons are with a similar survey conducted in 2023.

About CGA by NIQ

CGA by NIQ provides definitive On Premise consumer intelligence that reveals new pathways to growth for the world's most successful food and drink brands. With more than 30 years of best-in-class research, data, and analytics, CGA by NIQ provides the Full View(TM). CGA by NIQ works with food and beverage suppliers, consumer brand owners, wholesalers, government entities, pubs, bars, and restaurants to protect and shape the future of the On Premise experience. Using the most complete and clear understanding of measurement and insights, CGA by NIQ provides a competitive edge to guide winning strategies for On Premise businesses.



NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit [NIQ.com](https://www.niq.com) or www.cgastrategy.com.

About Stay in a Pub

Stay in a Pub is a carefully curated collection of over 1600 boutique pubs, traditional coaching inns, and quality affordable pub accommodation through the UK. Here you'll find real places, real people, and real stays – Great British Stays.

Stay in a Pub's mission is to inspire a new way to stay and they are passionate about the great British pub. By celebrating the unique heritage of pubs and promoting the growing popularity of pubs with rooms, they have boosted the perception of this alternative way to stay.



Social media:

Website: <http://stayinapub.co.uk>

Facebook: <https://www.facebook.com/stayinapub>

Instagram: <https://www.instagram.com/stayinapub/>

Email: info@stayinapub.co.uk