

Europe

May 2025

May 2025: Europe's major markets are not the outperformers

May 2024 was synonymous with a general upturn in European sales. The picture is more mixed in May 2025, with the underdogs on the offensive and Europe's performance dynamics continuing to evolve strongly.

Overall, average daily rates rose by 2.5% and OR by 1.7 points, enabling European hoteliers to record RevPAR growth of 4.9% compared to May 2024.

With warmer temperatures, public holidays in some markets and continued MICE and corporate activity, May saw hotel occupancy levels ranging from 69.26% in France to 83.46% in Portugal, for an average occupancy rate of 74.2% across the panel sample.

Double-digit RevPAR increases again

Latvia attracted Russian customers eager to take advantage of milder temperatures and longer days. The destination boosted its RevPAR by 17.9% compared with May 2024. TO was up 6.3 points.

Greece was already a top performer in May 2024, and its rating continues to climb, with RevPAR up 14.9%. Occupancy rate is up 9.8 points (also the panel's highest increase), while average daily rates are stagnant at -0.3%.

Next up was Austria, whose mountains attracted tourists with a 14.8% increase in RevPAR. The 11.3% rise in average daily rates, combined with a 2.3-point increase in occupancy rates, boosted sales.

Poland and Germany were the last two countries to post RevPAR increases of over 10%, at 13.2 and 11.9% respectively.

Normalization in the biggest markets

Germany, which was among the worst performers in May 2024, is catching up, with a 6.2-point increase in occupancy rate and stable average daily rates, resulting in RevPAR growth of 11.9%. The hosting of the Champions League final undoubtedly boosted performance.

In the UK, the signs are for a slowdown, with OR stagnating at -0.1 points, ADR down and RevPAR down by 1.8%. It was the only destination not to post a positive performance.

Despite occupancy stagnating at -0.3 points, France maintained RevPAR at +1.9%.

Spain benefited from the return of fine weather, with RevPAR up 9.5%, OR up 1.2 points, and average daily rates up 8% on May 2024.

On the French market, a number of events were held in May, but they were not enough to sustain OR, which fell by 0.3 points, still below 70%. However, hoteliers capitalized on this wealth of events to maintain average daily rates at +2.4%, with RevPAR up 1.9%.

The performance of European destinations in May 2025 is not overly homogeneous or legible.

HOTEL RESULTS IN EUROPE

May 2025 – by category - Global Europe (Hotrec members)

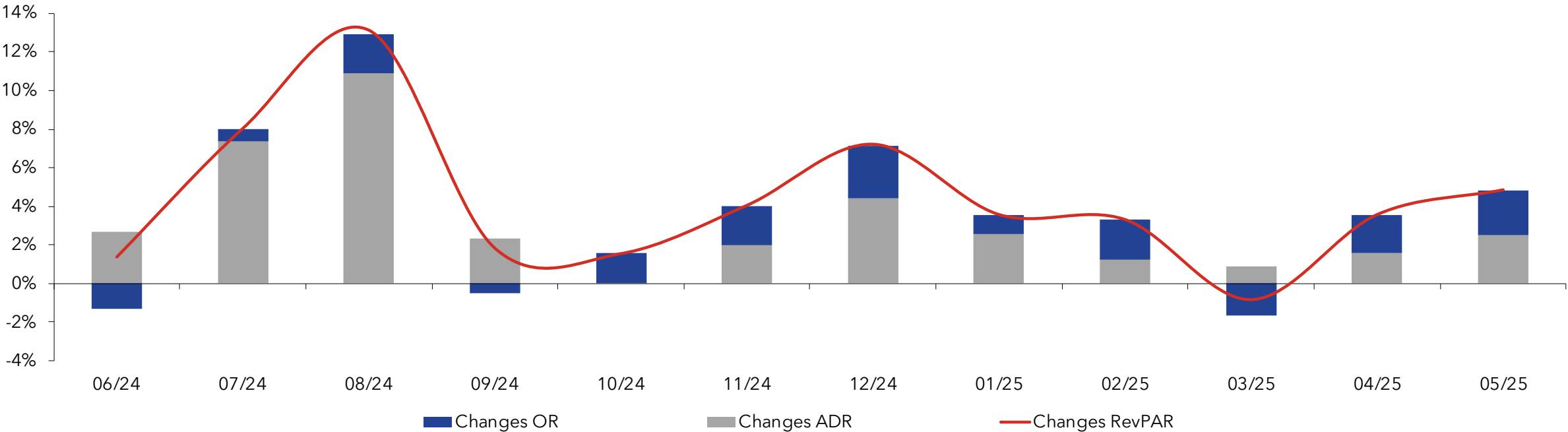
CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	72,8%	0,9	-0,3	81,1	2,0%	5,3%	59,1	3,2%	4,9%
3*	74,2%	1,7	1,2	105,8	1,2%	5,2%	78,5	3,5%	7,0%
4*	76,1%	2,5	3,9	157,5	2,2%	5,2%	119,9	5,8%	10,9%
5*	71,6%	0,8	5,1	376,7	5,7%	10,2%	269,6	7,0%	18,6%
GLOBAL	74,2%	1,7	2,1	140,5	2,5%	7,3%	104,2	4,9%	10,5%

Year-to-Date May 2025 – by category - Global Europe (Hotrec members)

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	64,3%	-0,1	-0,5	73,5	0,6%	3,0%	47,3	0,4%	2,3%
3*	66,0%	0,5	0,7	95,9	0,9%	3,5%	63,3	1,7%	4,5%
4*	67,0%	1,4	3,1	139,6	1,7%	4,2%	93,5	3,9%	9,3%
5*	61,8%	1,3	4,3	312,7	4,4%	6,7%	193,1	6,7%	14,7%
GLOBAL	65,4%	0,7	1,5	122,7	2,1%	5,8%	80,3	3,3%	8,3%

HOTEL RESULTS IN EUROPE

OR, ADR and RevPAR change - Last 12 months



HOTEL RESULTS IN EUROPE

May 2025 – by category - Global Europe (Hotrec members)

COUNTRY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
Austria	80,7%	2,3	3,3	135,6	11,5%	15,5%	109,4	14,8%	20,3%
Belgium	76,1%	1,1	1,5	131,6	4,3%	5,8%	100,1	5,7%	7,9%
Czech Republic	81,3%	7,8	6,7	118,2	-0,5%	19,0%	96,1	10,1%	29,6%
France	69,3%	-0,3	-0,6	129,4	2,4%	3,7%	89,6	1,9%	2,7%
Germany	75,2%	6,2	4,3	116,7	2,7%	2,2%	87,7	11,9%	8,4%
Greece	74,4%	9,8	1,5	208,1	-0,3%	15,8%	154,7	14,9%	18,2%
Hungary	80,7%	1,3	8,7	115,5	8,3%	17,3%	93,2	10,1%	31,4%
Ireland	89,3%	-0,9	3,8	170,8	-4,5%	1,0%	152,4	-5,4%	5,6%
Italy	83,0%	1,7	1,2	195,2	2,8%	10,8%	162,0	5,0%	12,4%
Latvia	77,1%	6,3	16,0	89,6	8,3%	-17,5%	69,1	17,9%	4,0%
Lithuania	85,4%	5,8	11,2	86,9	12,6%	4,0%	74,2	20,8%	19,7%
Luxembourg	79,1%	1,2	4,7	155,4	2,0%	4,2%	122,9	3,7%	10,7%
Malta	69,8%	-1,0	-7,4	165,0	1,3%	17,7%	115,1	-0,1%	6,3%
Poland	76,4%	4,5	8,3	100,9	6,6%	8,8%	77,1	13,2%	22,2%
Portugal	83,8%	3,2	5,1	160,5	4,3%	11,5%	134,5	8,5%	18,7%
Romania	77,2%	5,7	4,9	107,5	7,8%	16,3%	83,0	16,4%	24,2%
Spain	81,6%	1,2	5,9	158,7	8,0%	21,1%	129,5	9,5%	30,5%
Switzerland	75,0%	0,1	4,6	187,8	1,1%	2,9%	140,9	1,3%	9,6%
The Netherlands	79,8%	1,3	1,5	175,6	2,1%	2,9%	140,1	3,8%	4,8%
Turkey	69,0%	-3,3	6,5	149,5	31,7%	113,5%	103,2	25,7%	135,5%
United Kingdom	80,2%	-0,1	1,1	140,2	-1,7%	-0,8%	112,4	-1,8%	0,6%

HOTEL RESULTS IN EUROPE

Year-to-Date May 2025 – by country - Global Europe (Hotrec members)

COUNTRY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
Austria	67,2%	2,0	4,0	122,3	6,3%	9,9%	82,2	9,6%	16,8%
Belgium	66,7%	0,6	1,2	121,9	-0,5%	2,2%	81,3	0,4%	4,1%
Czech Republic	67,3%	1,5	3,0	92,4	0,9%	15,4%	62,1	3,2%	20,7%
France	61,9%	0,0	-0,5	117,1	2,2%	3,5%	72,5	2,1%	2,6%
Germany	63,9%	1,3	3,0	106,5	1,4%	2,5%	68,1	3,6%	7,7%
Greece	61,9%	2,4	3,1	173,8	3,3%	14,9%	107,5	7,5%	20,9%
Hungary	65,8%	3,2	5,4	101,8	6,9%	11,4%	67,0	12,4%	21,3%
Ireland	80,3%	-1,9	2,1	147,5	-0,2%	-4,6%	118,5	-2,5%	-2,0%
Italy	70,8%	0,6	1,0	158,8	2,0%	8,6%	112,4	2,9%	10,1%
Latvia	59,6%	8,1	14,2	75,3	1,8%	-11,0%	44,9	17,9%	17,0%
Lithuania	71,4%	4,9	8,8	77,0	6,1%	2,7%	55,0	13,9%	17,2%
Luxembourg	69,8%	1,7	3,4	147,7	-0,2%	3,3%	103,1	2,4%	8,6%
Malta	55,7%	3,0	2,7	125,8	2,0%	8,2%	70,0	7,8%	13,8%
Poland	65,0%	3,0	4,2	87,6	5,0%	4,4%	56,9	10,1%	11,5%
Portugal	67,0%	2,2	3,1	123,6	1,5%	5,4%	82,8	5,0%	10,5%
Romania	65,8%	3,1	4,5	102,3	6,4%	17,5%	67,4	11,6%	26,1%
Spain	72,0%	-0,2	3,5	141,0	5,8%	16,6%	101,5	5,5%	22,5%
Switzerland	62,7%	1,3	3,8	188,8	1,1%	2,5%	118,4	3,3%	9,0%
The Netherlands	72,3%	1,1	2,3	151,0	1,1%	1,1%	109,1	2,7%	4,3%
Turkey	59,9%	-1,9	4,4	122,2	28,7%	101,7%	73,1	24,7%	117,7%
United Kingdom	73,7%	-0,1	0,0	124,9	-0,8%	-0,4%	92,0	-0,8%	-0,4%

HOTEL RESULTS IN EUROPE



May 2025 – by category – France

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	66,7%	-1,1	-3,4	65,5	-0,7%	1,9%	43,7	-2,4%	-3,1%
3*	68,4%	-0,5	-1,7	96,7	-0,3%	0,6%	66,2	-1,0%	-1,8%
4*	73,1%	1,7	3,1	170,0	1,6%	3,5%	124,3	4,1%	8,1%
5*	71,3%	2,0	7,7	585,3	7,0%	8,4%	417,1	10,1%	21,4%
GLOBAL	69,3%	-0,3	-0,6	129,4	2,4%	3,7%	89,6	1,9%	2,7%

Year-to-Date May 2025 – by category – France

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	59,3%	-0,5	-3,2	61,7	-0,4%	1,5%	36,6	-1,3%	-3,7%
3*	62,3%	-0,2	-1,1	90,2	-0,1%	0,5%	56,2	-0,4%	-1,2%
4*	65,2%	1,5	2,4	152,0	1,4%	2,0%	99,1	3,9%	5,9%
5*	60,3%	2,3	5,1	442,4	5,8%	4,9%	266,7	9,9%	14,5%
GLOBAL	61,9%	0,0	-0,5	117,1	2,2%	3,5%	72,5	2,1%	2,6%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Germany

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	73,3%	4,9	2,4	92,7	1,6%	2,8%	68,0	8,9%	6,3%
3*	76,3%	6,9	3,3	110,9	1,1%	5,4%	84,6	11,2%	10,2%
4*	74,3%	4,7	3,8	126,0	4,0%	-2,4%	93,6	11,1%	2,9%
5*	75,1%	7,4	11,9	272,3	8,4%	7,4%	204,4	20,3%	27,7%
GLOBAL	75,2%	6,2	4,3	116,7	2,7%	2,2%	87,7	11,9%	8,4%

Year-to-Date May 2025 – by category – Germany

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	63,4%	-0,2	2,2	83,7	-0,3%	2,6%	53,1	-0,6%	6,2%
3*	64,8%	2,0	2,5	101,2	1,5%	4,1%	65,5	4,6%	8,2%
4*	64,3%	1,7	3,1	116,5	0,9%	0,0%	74,9	3,6%	5,1%
5*	62,5%	5,5	10,8	247,0	2,7%	-1,5%	154,4	12,7%	19,1%
GLOBAL	63,9%	1,3	3,0	106,5	1,4%	2,5%	68,1	3,6%	7,7%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Spain

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	86,7%	1,1	6,1	89,2	9,4%	21,2%	77,3	10,8%	30,4%
3*	82,8%	0,6	7,5	119,0	7,2%	22,9%	98,5	8,0%	35,1%
4*	80,6%	1,7	5,7	170,8	8,4%	22,5%	137,6	10,7%	31,8%
5*	74,0%	-0,3	5,4	332,6	6,6%	17,6%	246,1	6,2%	26,8%
GLOBAL	81,6%	1,2	5,9	158,7	8,0%	21,1%	129,5	9,5%	30,5%

Year-to-Date May 2025 – by category – Spain

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	70,1%	2,6	4,0	65,7	1,1%	4,5%	46,1	5,0%	10,9%
3*	75,0%	4,5	3,6	93,1	0,5%	1,3%	69,9	6,9%	6,4%
4*	66,6%	1,6	2,8	117,2	1,0%	4,3%	78,0	3,5%	8,9%
5*	63,6%	2,3	-0,1	292,2	2,7%	7,7%	185,8	6,6%	7,5%
GLOBAL	72,0%	-0,2	3,5	141,0	5,8%	16,6%	101,5	5,5%	22,5%

HOTEL RESULTS IN EUROPE



May 2025 – by category – United Kingdom

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	79,4%	-0,5	0,1	92,8	1,5%	4,6%	73,7	0,9%	4,7%
3*	78,8%	1,0	0,3	118,1	-0,7%	3,7%	93,0	0,6%	4,1%
4*	78,4%	1,9	2,9	160,9	-3,1%	-1,7%	126,1	-0,6%	2,1%
5*	75,0%	-0,8	1,1	367,0	-7,1%	-8,5%	275,2	-8,1%	-7,2%
GLOBAL	80,2%	-0,1	1,1	140,2	-1,7%	-0,8%	112,4	-1,8%	0,6%

Year-to-Date May 2025 – by category – United Kingdom

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	74,0%	0,4	0,7	83,3	0,2%	-0,9%	61,7	0,7%	0,1%
3*	73,2%	0,1	0,1	105,6	-0,7%	1,1%	77,3	-0,6%	1,2%
4*	72,0%	0,5	2,8	142,8	-2,1%	-0,7%	102,8	-1,4%	3,4%
5*	67,8%	2,2	1,3	332,3	-2,7%	-4,7%	225,5	0,5%	-2,8%
GLOBAL	73,7%	-0,1	0,0	124,9	-0,8%	-0,4%	92,0	-0,8%	-0,4%

HOTEL RESULTS IN EUROPE

May 2025 – by category – The Netherlands

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	78,3%	-0,2	-4,9	106,5	-6,4%	2,4%	83,4	-6,6%	-3,6%
3*	84,3%	0,1	2,2	134,8	-0,2%	2,3%	113,6	-0,1%	5,1%
4*	78,5%	1,1	1,1	175,8	3,3%	4,6%	138,0	4,8%	6,0%
5*	75,2%	4,5	3,7	325,7	0,0%	-3,8%	244,9	6,3%	1,2%
GLOBAL	79,8%	1,3	1,5	175,6	2,1%	2,9%	140,1	3,8%	4,8%

Year-to-Date May 2025 – by category – The Netherlands

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
2*	70,1%	2,6	4,0	65,7	1,1%	4,5%	46,1	5,0%	10,9%
3*	75,0%	4,5	3,6	93,1	0,5%	1,3%	69,9	6,9%	6,4%
4*	66,6%	1,6	2,8	117,2	1,0%	4,3%	78,0	3,5%	8,9%
5*	63,6%	2,3	-0,1	292,2	2,7%	7,7%	185,8	6,6%	7,5%
GLOBAL	72,3%	1,1	2,3	151,0	1,1%	1,1%	109,1	2,7%	4,3%

HOTEL RESULTS IN EUROPE

May 2025 – by category – Austria

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	79,5%	2,3	-1,7	112,9	11,2%	16,1%	89,8	14,5%	13,7%
4*	83,2%	3,5	6,9	142,2	11,8%	12,4%	118,3	16,6%	22,6%
5*	74,2%	1,3	3,5	286,2	12,8%	13,4%	212,4	14,8%	19,0%
GLOBAL	80,7%	2,3	3,3	135,6	11,5%	15,5%	109,4	14,8%	20,3%

Year-to-Date May 2025 – by category – Austria

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	68,0%	2,4	3,3	98,2	6,3%	8,2%	66,8	10,1%	13,8%
4*	68,0%	2,2	3,0	124,5	7,8%	10,7%	84,6	11,4%	15,8%
5*	60,8%	-1,8	3,4	275,6	6,2%	6,2%	167,4	3,1%	12,4%
GLOBAL	67,2%	2,0	4,0	122,3	6,3%	9,9%	82,2	9,6%	16,8%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Belgium

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	76,1%	2,5	2,4	112,8	2,1%	4,9%	85,8	5,5%	8,4%
4*	75,4%	2,0	2,9	152,8	4,9%	4,4%	115,2	7,7%	8,6%
5*	67,4%	-0,3	-0,6	201,1	3,6%	0,3%	135,6	3,1%	-0,5%
GLOBAL	76,1%	1,1	1,5	131,6	4,3%	5,8%	100,1	5,7%	7,9%

Year-to-Date May 2025 – by category – Belgium

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	65,5%	0,2	0,0	104,0	-1,0%	1,9%	68,2	-0,7%	1,9%
4*	66,5%	0,7	3,0	141,9	-0,8%	1,1%	94,4	0,2%	5,9%
5*	60,8%	0,7	5,0	192,8	0,3%	-1,4%	117,2	1,5%	7,5%
GLOBAL	66,7%	0,6	1,2	121,9	-0,5%	2,2%	81,3	0,4%	4,1%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Italy

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	82,9%	2,8	-0,9	99,2	1,5%	10,9%	82,3	5,0%	9,8%
4*	83,3%	2,1	2,2	177,4	4,4%	12,0%	147,7	7,1%	15,0%
5*	74,5%	-1,2	-2,6	618,5	5,0%	10,3%	460,8	3,3%	6,7%
GLOBAL	83,0%	1,7	1,2	195,2	2,8%	10,8%	162,0	5,0%	12,4%

Year-to-Date May 2025 – by category – Italy

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	72,6%	-0,7	-1,8	86,6	3,4%	9,7%	62,9	2,4%	7,1%
4*	70,6%	1,0	2,1	147,4	2,1%	9,4%	104,0	3,6%	12,8%
5*	65,1%	2,8	4,5	501,4	1,7%	9,3%	326,4	6,4%	17,5%
GLOBAL	70,8%	0,6	1,0	158,8	2,0%	8,6%	112,4	2,9%	10,1%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Switzerland

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	80,4%	0,9	5,2	170,8	0,1%	1,9%	137,2	1,2%	9,0%
4*	76,3%	2,8	7,8	205,5	2,2%	7,5%	156,8	6,1%	19,8%
5*	46,6%	-9,2	-12,9	343,6	-4,9%	-15,6%	160,0	-20,6%	-33,9%
GLOBAL	75,0%	0,1	4,6	187,8	1,1%	2,9%	140,9	1,3%	9,6%

Year-to-Date May 2025 – by category – Switzerland

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	69,8%	2,0	4,0	145,0	-1,4%	-1,7%	101,3	1,4%	4,3%
4*	64,2%	2,9	6,5	186,0	0,5%	3,0%	119,4	5,3%	14,5%
5*	49,4%	-2,6	1,6	444,7	4,9%	4,8%	219,6	-0,3%	8,4%
GLOBAL	62,7%	1,3	3,8	188,8	1,1%	2,5%	118,4	3,3%	9,0%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Turkey

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	72,2%	-0,4	2,7	73,8	18,6%	116,9%	53,3	18,0%	125,2%
4*	66,0%	-4,7	5,0	136,0	29,4%	103,9%	89,8	20,8%	120,7%
5*	69,2%	-4,1	9,7	224,7	38,2%	120,0%	155,5	30,5%	155,7%
GLOBAL	69,0%	-3,3	6,5	149,5	31,7%	113,5%	103,2	25,7%	135,5%

Year-to-Date May 2025 – by category – Turkey

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	62,8%	-1,2	0,1	65,3	25,4%	129,3%	41,0	23,1%	129,8%
4*	59,7%	-1,6	6,3	119,1	24,2%	92,6%	71,1	21,1%	115,1%
5*	57,5%	-2,9	5,0	177,1	32,6%	97,3%	101,9	26,1%	116,0%
GLOBAL	59,9%	-1,9	4,4	122,2	28,7%	101,7%	73,1	24,7%	117,7%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Greece

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	82,7%	27,7	2,0	124,3	4,3%	21,5%	102,7	56,8%	24,5%
5*	70,3%	1,9	-0,2	261,4	0,4%	17,5%	183,8	3,1%	17,1%
GLOBAL	74,4%	9,8	1,5	208,1	-0,3%	15,8%	154,7	14,9%	18,2%

Year-to-Date May 2025 – by category – Greece

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	68,9%	4,1	4,5	112,8	5,4%	17,7%	77,7	12,1%	25,9%
5*	59,0%	-0,7	2,4	216,3	4,6%	14,6%	127,7	3,4%	19,4%
GLOBAL	61,9%	2,4	3,1	173,8	3,3%	14,9%	107,5	7,5%	20,9%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Portugal

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	84,3%	3,6	5,2	150,9	4,0%	12,0%	127,2	8,6%	19,3%
5*	75,6%	2,7	8,5	317,3	4,6%	9,7%	239,9	8,6%	23,7%
GLOBAL	83,8%	3,2	5,1	160,5	4,3%	11,5%	134,5	8,5%	18,7%

Year-to-Date May 2025 – by category – Portugal

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	66,6%	1,6	2,8	117,2	1,0%	4,3%	78,0	3,5%	8,9%
5*	63,6%	2,3	-0,1	292,2	2,7%	7,7%	185,8	6,6%	7,5%
GLOBAL	67,0%	2,2	3,1	123,6	1,5%	5,4%	82,8	5,0%	10,5%

HOTEL RESULTS IN EUROPE

May 2025 – by category – Luxembourg

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	86,0%	0,2	3,7	127,2	1,5%	2,6%	109,4	1,7%	7,3%
4*	80,7%	2,0	7,9	159,8	2,4%	4,4%	128,9	5,0%	15,8%
GLOBAL	79,1%	1,2	4,7	155,4	2,0%	4,2%	122,9	3,7%	10,7%

Year-to-Date May 2025 – by category – Luxembourg

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
3*	76,1%	1,8	4,3	118,9	0,7%	3,2%	90,5	3,0%	9,3%
4*	72,6%	4,2	6,3	150,3	-0,7%	3,1%	109,1	5,4%	12,9%
GLOBAL	69,8%	1,7	3,4	147,7	-0,2%	3,3%	103,1	2,4%	8,6%

HOTEL RESULTS IN EUROPE

May 2025 – by category – Hungary

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	81,4%	1,9	11,2	101,5	7,2%	12,2%	82,5	9,7%	30,2%
GLOBAL	80,7%	1,3	8,7	115,5	8,3%	17,3%	93,2	10,1%	31,4%

Year-to-Date May 2025 – by category – Hungary

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	64,5%	2,5	4,4	89,5	6,9%	10,9%	57,7	11,2%	19,1%
GLOBAL	65,8%	3,2	5,4	101,8	6,9%	11,4%	67,0	12,4%	21,3%

HOTEL RESULTS IN EUROPE



May 2025 – by category – Poland

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	76,9%	2,6	9,1	130,2	8,8%	6,3%	100,1	12,6%	20,5%
GLOBAL	76,4%	4,5	8,3	100,9	6,6%	8,8%	77,1	13,2%	22,2%

Year-to-Date May 2025 – by category – Poland

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	70,0%	4,0	5,7	113,5	4,6%	-1,1%	79,4	11,0%	7,6%
GLOBAL	65,0%	3,0	4,2	87,6	5,0%	4,4%	56,9	10,1%	11,5%

HOTEL RESULTS IN EUROPE

May 2025 – by category – Czech Republic

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	81,4%	5,0	9,7	120,5	-1,1%	14,1%	98,1	5,4%	29,4%
GLOBAL	81,3%	7,8	6,7	118,2	-0,5%	19,0%	96,1	10,1%	29,6%

Year-to-Date May 2025 – by category – Czech Republic

CATEGORY	Occupancy Rate			ADR			RevPAR		
	%	change (pt) 2024	change (pt) 2023	€	change (%) 2024	change (%) 2023	€	change (%) 2024	change (%) 2023
4*	64,9%	0,8	4,7	97,5	0,6%	8,3%	63,3	1,8%	16,7%
GLOBAL	67,3%	1,5	3,0	92,4	0,9%	15,4%	62,1	3,2%	20,7%



METHODOLOGY

1 Sample

The report presents the results of corporate brand hotels in Europe. The sample consists of a total of more than 6,500 hotels, representing more than 800,000 rooms. The breakdown by segment is as follows: 30% for Budget and Economic hotels, 30% for midscale hotels and 40% for upscale hotels.

Hotels are classified according to the hotel star system: from 1* to 5*. The category of corporate chain hotels are allocated individually according to MKG Hospitality's market expertise and reflect the "marketing classification" in complement to the official rating system(s) of the country (if any). The category breakdowns for global supply are taken from MKG Hospitality's database and from information provided by statistical and/or hotel industry institutions (e.g. associations, unions).

2 Glossary

- **Occupancy rate:** Number of sold rooms divided by number of available rooms
- **Average daily rate:** Room revenue divided by number of sold rooms
- **RevPAR:** Occupancy rate x average daily price or room revenue divided by available rooms
- **Available rooms:** Capacity x number of operating days (within a month)
- **Sold rooms:** Capacity x number of operating days x occupancy rate
- **Room revenue:** Room revenue expressed net of VAT (excluding other types of revenue such as food and beverage, etc.)