

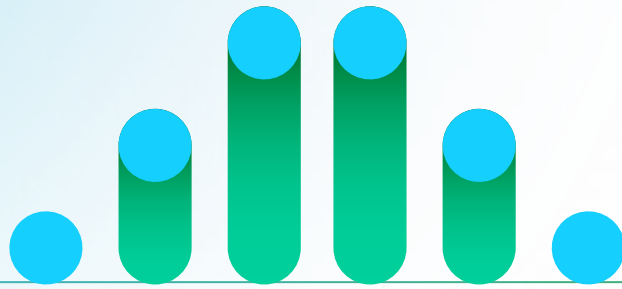
LONDON

TRAVEL TRENDS REPORT

October to December 2025



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Foreword

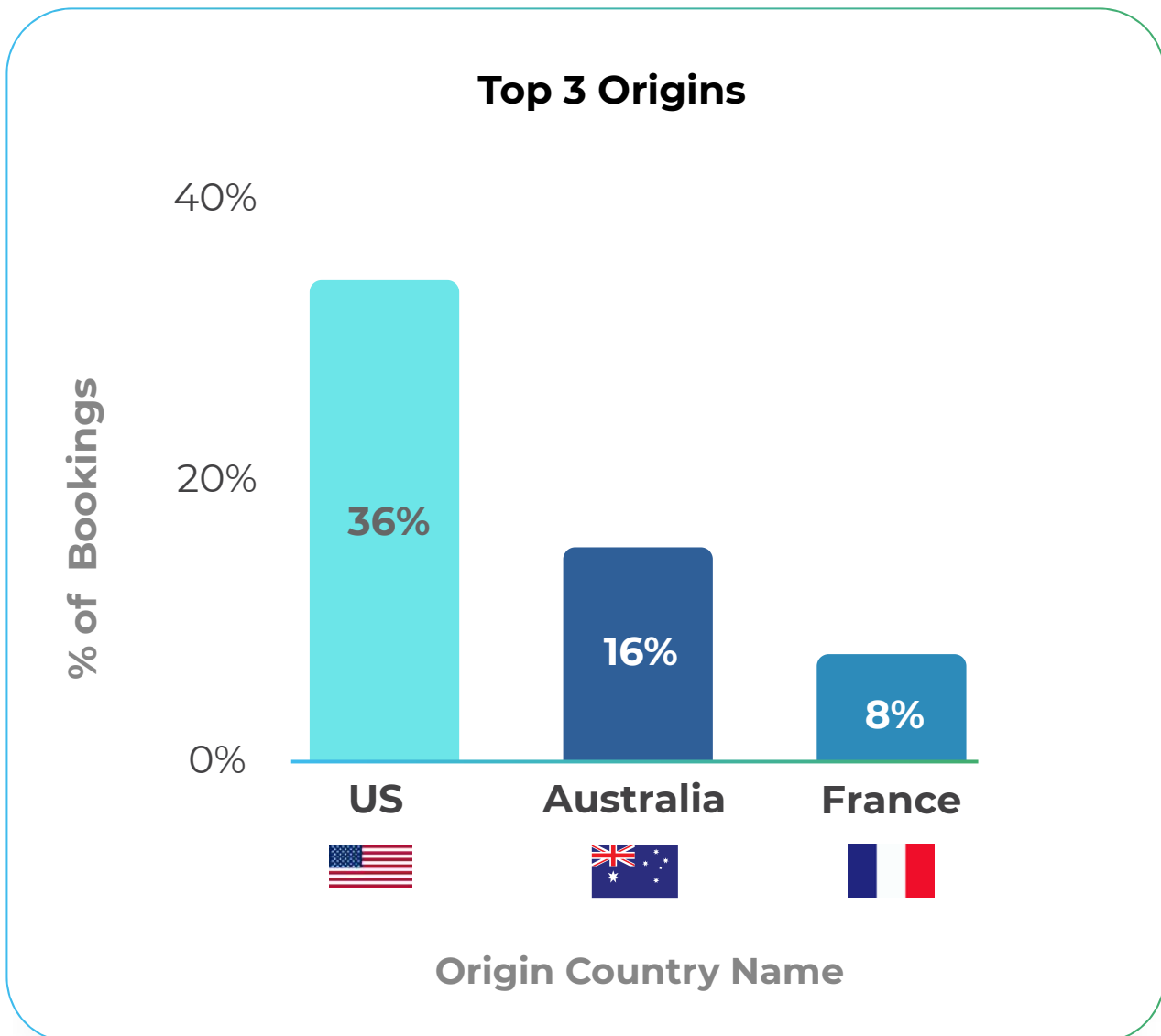
As London heads into the year-end travel season, demand will be defined by two powerful visitor segments: high-frequency business travelers from the U.S. and Australia, and comfort-driven leisure guests from France.

This report unpacks who's coming, why they're traveling, how long they'll stay, when they'll book, what group sizes they travel in, and where pricing trends are heading—equipping operators to plan fleets and pricing strategies that protect margins this quarter.



U.S. Takes the Lead in London Arrivals

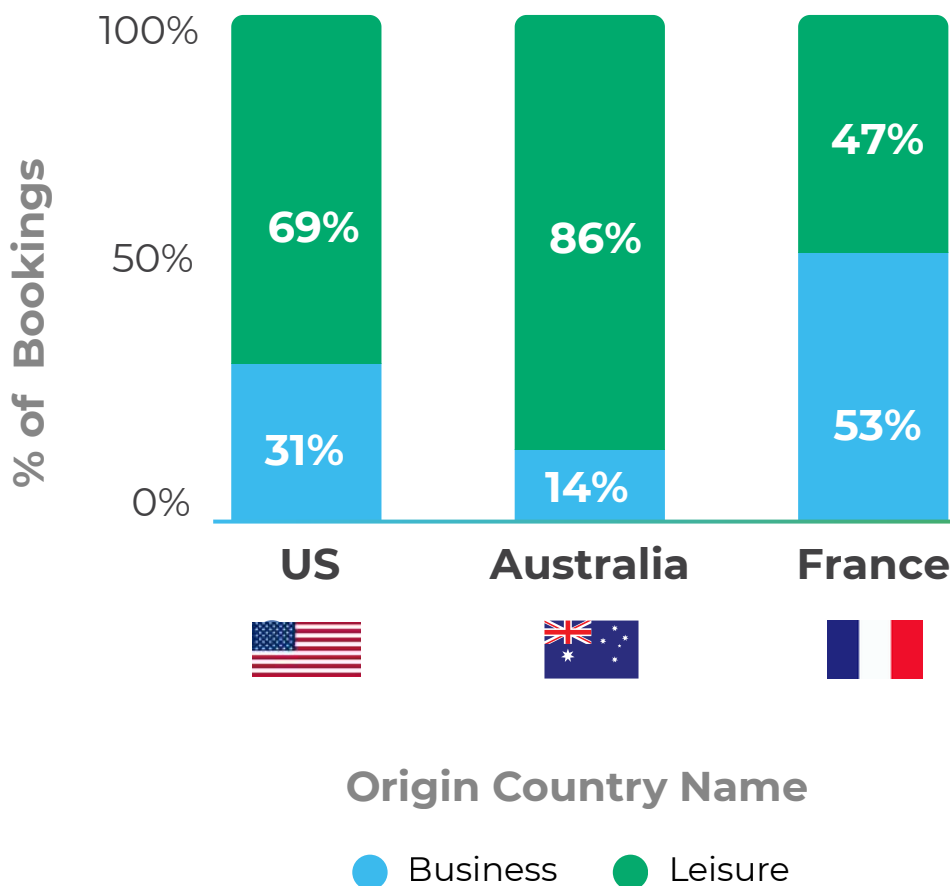
U.S. travelers will drive 36% of arrivals, followed by Australia at 16% and France at 8%. Operators must stay versatile—serving fast-turn corporate demand from the U.S. and Australia while offering comfortable, longer-stay options for French couples and families.



Business from France, Leisure from Australia

U.S. and Australian visitors will mainly come for leisure, while the French will tilt a bit more toward business. Operators should prioritise comfort-first leisure offers for the U.S./Australia and keep weekday, corporate-ready capacity for France.

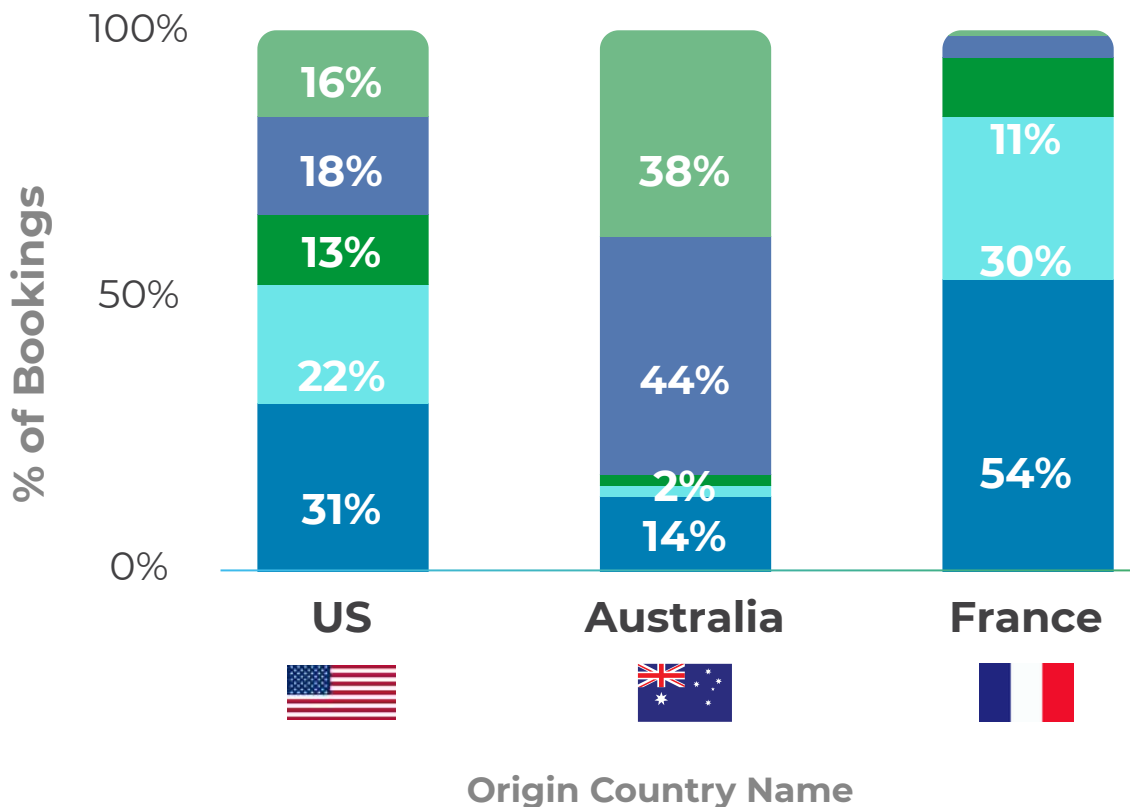
Reason for Travel by Top Origins



Short U.S. Trips, Long Australian Stays

Most American and French travelers will prefer short visits, while Australians will typically stay a week or longer. For operators, this points toward ensuring attractive daily rates for shorter timeline bookings and offering value-packed weekly deals to capture longer bookings from Australians.

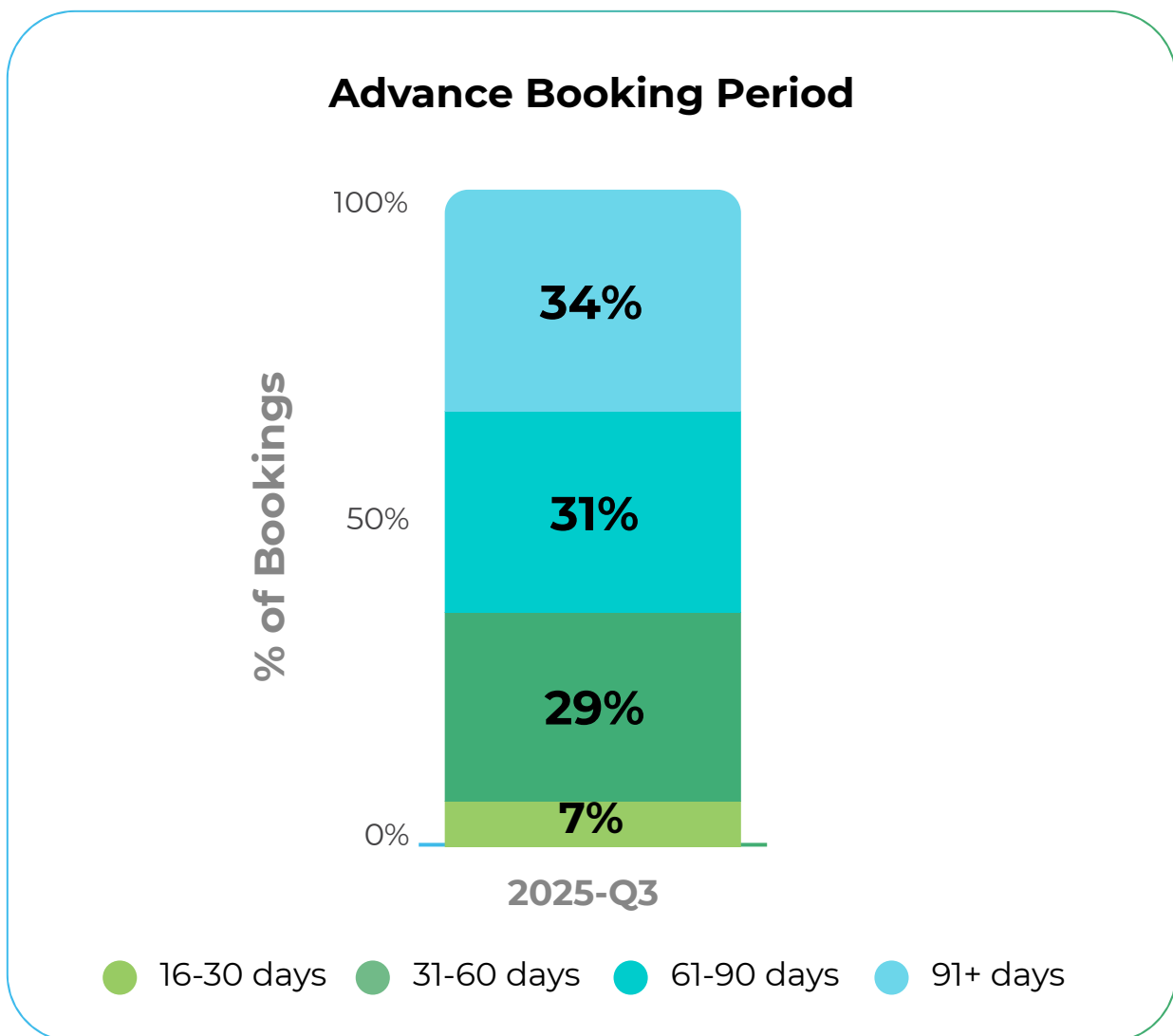
Trip Duration Category by Top Origins



● 1 to 2 days ● 3 to 4 days ● 5 to 6 days ● 7 to 10 days ● > 10 days

Most Bookings Made 2-3 Months Ahead

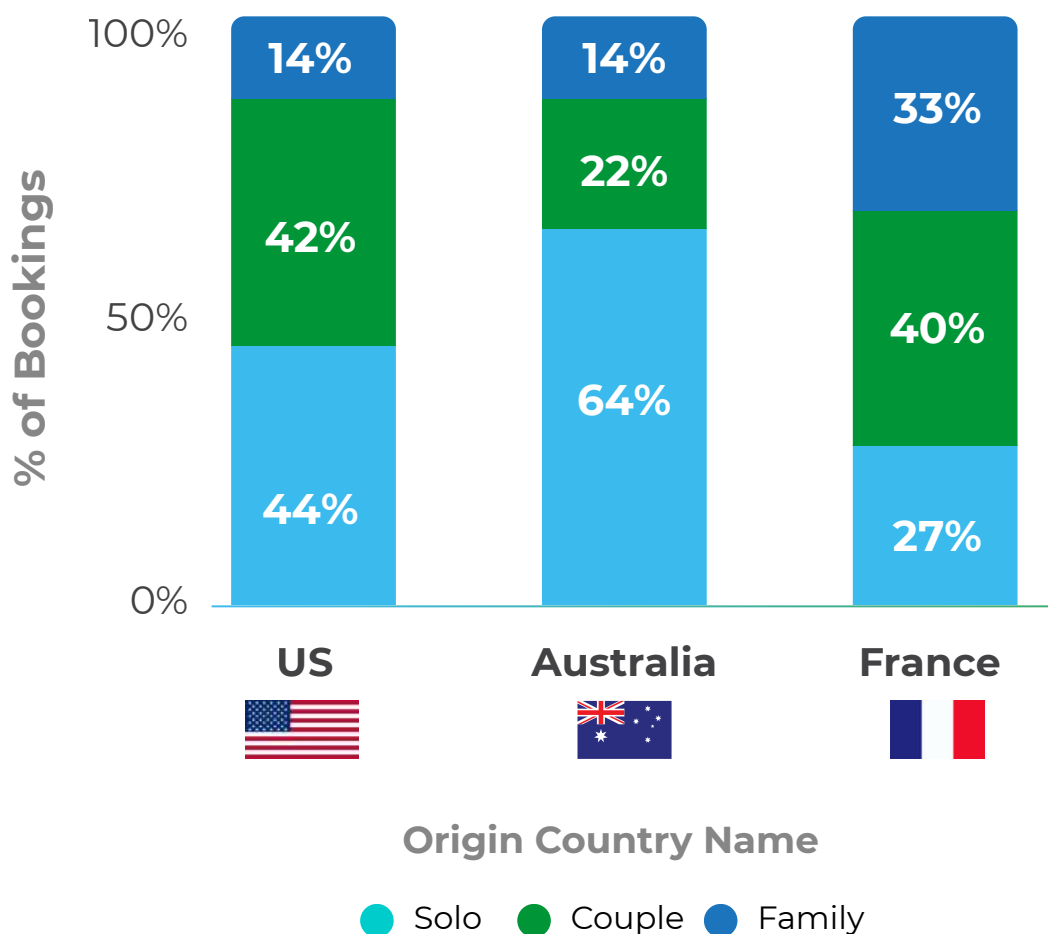
Visitors book well ahead, with nearly two-thirds reserving at least two months before arrival while the largest share book more than three months out. For operators, this underscores the value of early-bird pricing, loyalty rewards, and pre-trip upsells to capture demand long before peak dates.



Solo and Couple Travelers Will Lead

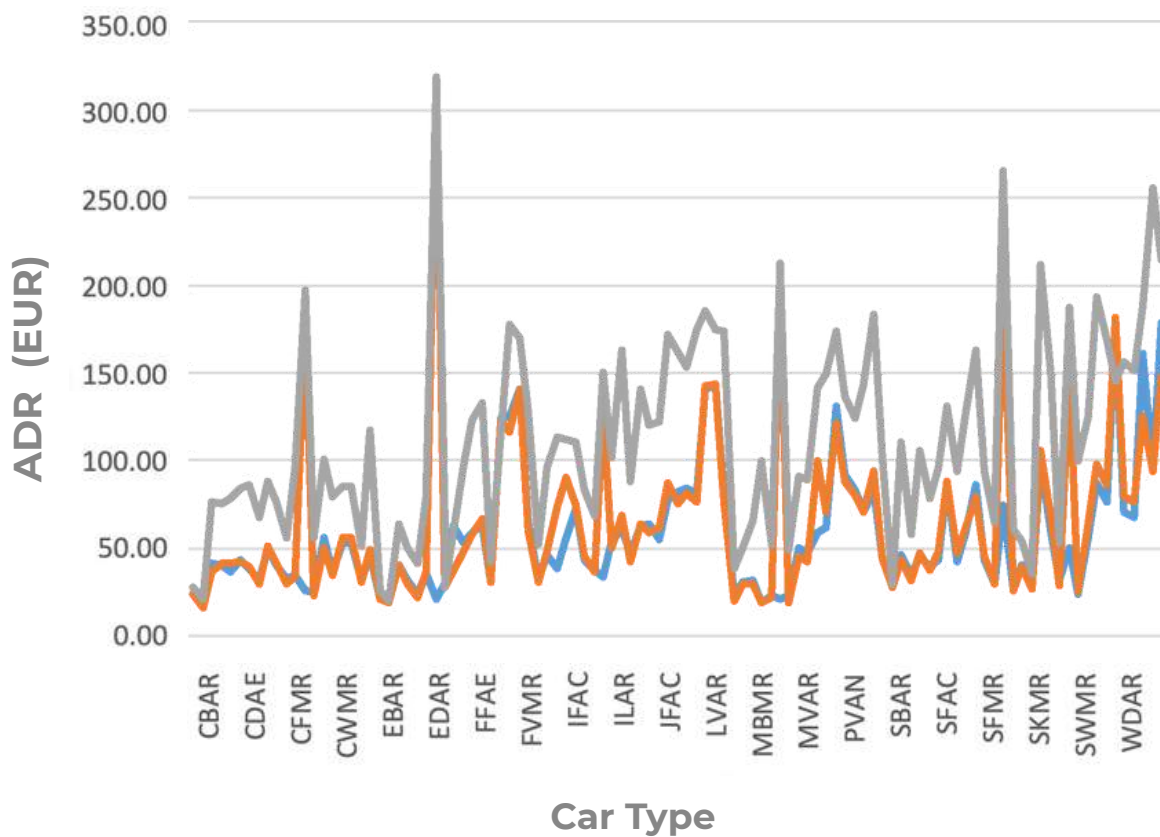
Solo and couple trips will dominate, especially among Australians and French travelers, while U.S. arrivals also bring families. A fleet mix of compact automatics for solo churn and SUVs/sedans for family trips will be key.

Group Size by Top Origins



Prices to Climb Toward December

Car rental prices will start low at €16.22 for compact cars and peak at €318.90 for economy cars by December. Rising holiday demand will push prices up, especially for larger and premium categories. Balancing early competitive pricing with late-season rate lifts will help operators protect margins.



*Each line represents the ADR for a car category on a specific pickup date

Key Strategies for Car Rentals

- 01 Capture U.S. & Australian Leisure Demand**

Focus on capturing leisure demand from these top 2 source markets and align your fleet and offers to prioritise leisure bookings.
- 02 Tailor offers by rental length**

Create targeted offers to capture longer rentals; for markets with shorter trips (including France), prioritise short-duration rates and weekend promos.
- 03 Target French Leisure With Comfort-First Rentals**

Promote sedans and SUVs for 3–6 day family and couple trips with weekend offers and add-ons.
- 04 Balance Fleet Between Solo & Group Needs**

Keep compact cars for churn and SUVs/vans ready for family holiday travelers.

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