Euromonitor International

Lodging in Western Europe

November 2022

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INTRODUCTION

Scope
Key findings

REGIONAL OVERVIEW

Western Europe remains a major lodging market despite COVID-19 losses
Positive growth expected in 2022-2027 after the COVID-19-impacted historic period
Race to recover lost sales for all countries in the post-2020 period
Short-term rentals the only channel to record a positive CAGR over 2017-2022
Turkey most dynamic over 2017-2022
Full recovery from the pandemic is proving to be a gradual process

LEADING COMPANIES AND BRANDS

Lodging has a fragmented competitive landscape
Airbnb makes major gains during the pandemic
Whitbread and Logis de France are single-market operators in the top 10 players
Short-term rental players make up the top three lodging brands

FORECAST PROJECTIONS

Positive value growth expected throughout the 2022-2027 period
Online transaction value growth will continue outpacing the offline value performance

COUNTRY SNAPSHOTS

Austria: Market Context
Austria: Competitive Landscape
Belgium: Market Context
Belgium: Competitive Landscape
Denmark: Market Context
Denmark: Competitive Landscape
Finland: Market Context
Finland: Competitive Landscape
France: Market Context
France: Competitive Landscape
Germany: Market Context
Germany: Competitive Landscape
Greece: Market Context
Greece: Competitive Landscape
Ireland: Market Context
Ireland: Competitive Landscape
Italy: Market Context
Italy: Competitive Landscape
Netherlands: Market Context
Netherlands: Competitive Landscape
Norway: Market Context
Norway: Competitive Landscape
Portugal: Market Context
Portugal: Competitive Landscape
Spain: Market Context
Spain: Competitive Landscape
Sweden: Market Context
Sweden: Competitive Landscape
Switzerland: Market Context
Switzerland: Competitive Landscape

Turkey: Market Context
Turkey: Competitive Landscape
UK: Market Context
UK: Competitive Landscape

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