Euromonitor International

Travel in Western Europe

December 2024

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Scope
Key findings

REGIONAL OVERVIEW

Western Europe has the second biggest market among the regions
Booking sales return to pre-pandemic levels in real value terms in 2024
All categories have returned to their pre-pandemic sales levels
Strong booking rebounds in France, Germany and the UK post-pandemic
Increasing visitor numbers and rising prices boost airlines sales in Turkey
All the main categories growing over 2019-2024 as a whole
Sustainability increasingly to the fore in the European travel industry
Olympics boosts the French travel industry performance in 2024

LEADING COMPANIES AND BRANDS

AccorHotels continues to lead the hotels category in Western Europe
Airbnb remains the leading brand in lodging at a regional level
National flag carriers fill the top four spots in travel modes
Strong value sales growth in Turkey propels Turkish Airlines to the top of the rankings
Booking Holdings continues to lead travel intermediaries in 2024
Increasing melding of operations by players in booking

FORECAST PROJECTIONS

Positive, but slowing, growth expected over the 2024-2029 period
Greater regulation of short-term rentals possible in the UK
Destination countries reacting to overtourism

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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