



Travel in Western Europe

December 2024

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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

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Denmark: Competitive Landscape

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