



Lodging in Western Europe

November 2022

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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

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Austria: Competitive Landscape

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Belgium: Competitive Landscape

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Denmark: Competitive Landscape

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Turkey: Market Context

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