

Booking.com

European Accommodation Barometer 2025



Lofoten Islands, Norway

statista 

Table of Contents

Executive Summary

Pg. 3

Economic Sentiment

Pg. 5

Labor and Staffing

Pg. 9

Training and Upskilling

Pg. 12

Technology Adoption

Pg. 15

Appendix

Country Insights

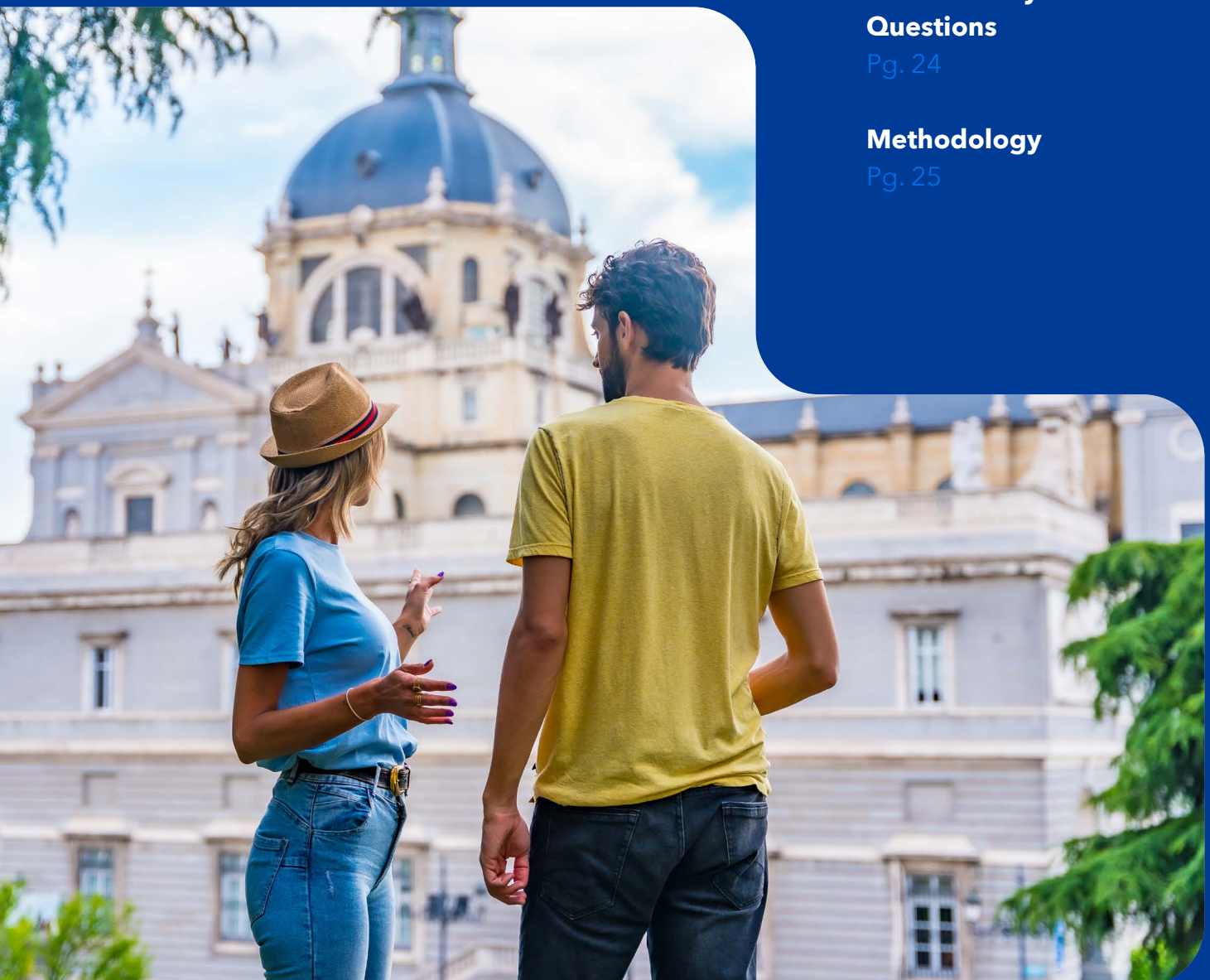
Pg. 17

List of Survey Questions

Pg. 24

Methodology

Pg. 25



Executive Summary

Europe’s travel accommodations: grounded, growing, and optimistic about the future

The 2025 European Accommodation Barometer shows a confident, forward-looking industry. Despite geopolitical frictions and economic uncertainty, Europe’s hospitality sector is holding firm: performance indicators are steady and optimism is widespread. Almost two-thirds of hoteliers (63%) expect continued improvement in the coming season – nearly matching last year’s record high and far exceeding the low point of 2022, when just 38% felt similarly positive. This is not just stabilization; it’s a sign of resilience and strength.

Confidence endures, even as momentum slows and geographic disparities widen

Perceptions of past and present business development softened slightly, with 57% and 58% of respondents, respectively, rating them as good or very good. While that marks a modest decline compared to 2024, negative sentiment remains minimal: fewer than one in ten respondents view current conditions poorly. Accommodations also continue to report improvements in room and occupancy rates (43% and 40%, respectively), although not to the same extent as in previous years.

The confidence gap between countries persists – Greece and Italy show consistently strong sentiment across metrics, while Germany and France show greater caution – but the broader European outlook remains anchored in durable optimism heading into the 2025 season.



63% of European accommodations expect positive business development in the coming six months

Access to capital and investment intentions hold steady

In this year’s Barometer, accommodations reported the same ease of accessing capital as in 2024, with 39% of respondents having no difficulty, compared to 19% who did experience some challenges. Investment trends remain consistent with the previous year as well: 62% of respondents plan to maintain existing investment levels, while the rest are nearly evenly divided between increasing or reducing their financial commitments. This sustained investment posture underscores the industry’s confidence in continued demand, despite the “revenge travel” phenomenon fading away.



Santorini, Greece



Matera, Italy

Chains and larger properties retain a structural advantage

Chain hotels outperform independent and alternative accommodations across sentiment measures – a pattern also reflected in larger properties versus smaller ones, and higher-star-rated hotels versus lower-star ones. In the accommodation industry, scale offers distinct advantages, evident in easier access to financing, more proactive investment strategies, and broader adoption of digital tools like AI. Independent and alternative accommodations continue to face greater headwinds and this divide remains one of the most consistent findings across Barometer surveys.

Staffing challenges persist across Europe

European hoteliers report stable staffing plans, but the struggle to hire and retain qualified workers persists. Reflecting broader business expectations, Greece and Spain show the highest hiring appetite, while Germany and Austria remain more restrained. Demand is concentrated in front-line roles such as housekeeping and food service. However, the most acute shortages are in specialized positions – including management, sales & marketing, and event planning – where the difficulty-to-ease hiring ratio for a qualified manager stands at as high as 10:1. Mismatched expectations regarding salaries and working hours are the top barriers, particularly for bigger properties.

47% of European accommodations struggle to find and hire candidates with the right skills or experience. Most difficult positions to fill:

- Management
- Sales & marketing
- Spa & recreation

Training, technology, and transformation

In-house training is the most common form of skills development, with chain hotels reporting greater investment in structured upskilling compared to their independent counterparts. While AI adoption holds promise – particularly in marketing and customer service – costs and integration complexity hampers uptake, especially among smaller operators. Chain hotels are the most enthusiastic tech adopters.

Note: 2023 figures refer to the first wave of the European Accommodation Barometer, with the survey conducted in spring – aligning with the timing of subsequent editions. Two waves were run in 2023 to better monitor the pace of post-COVID recovery.

The European Accommodation Barometer

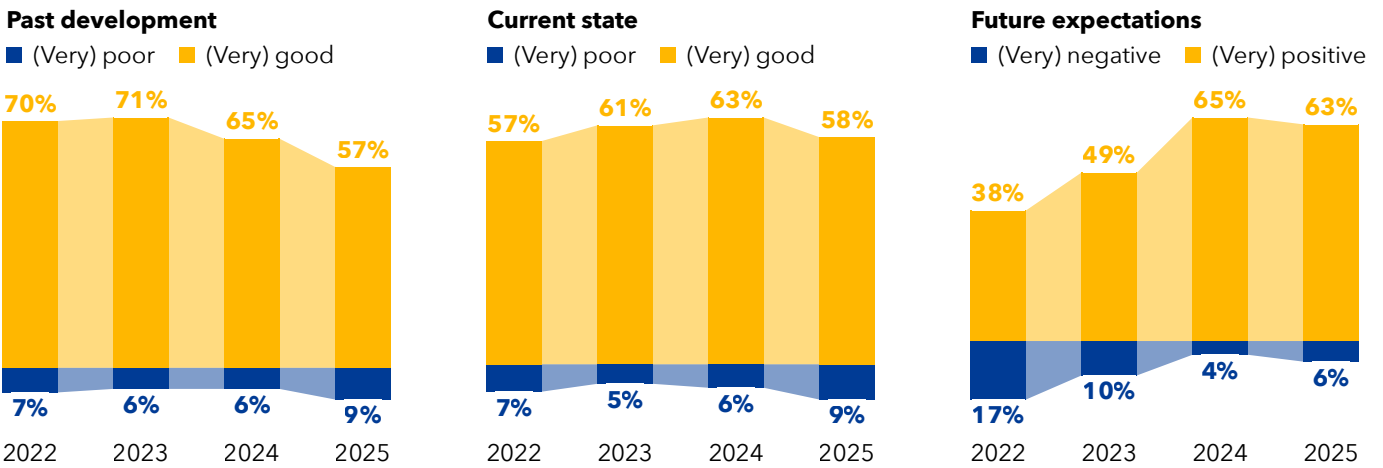
The fifth edition of the European Accommodation Barometer is based on a survey of 1,160 executives and managers across the European accommodation sector. It is jointly produced by Booking.com and Statista.

Economic Sentiment

Stable growth encourages optimism

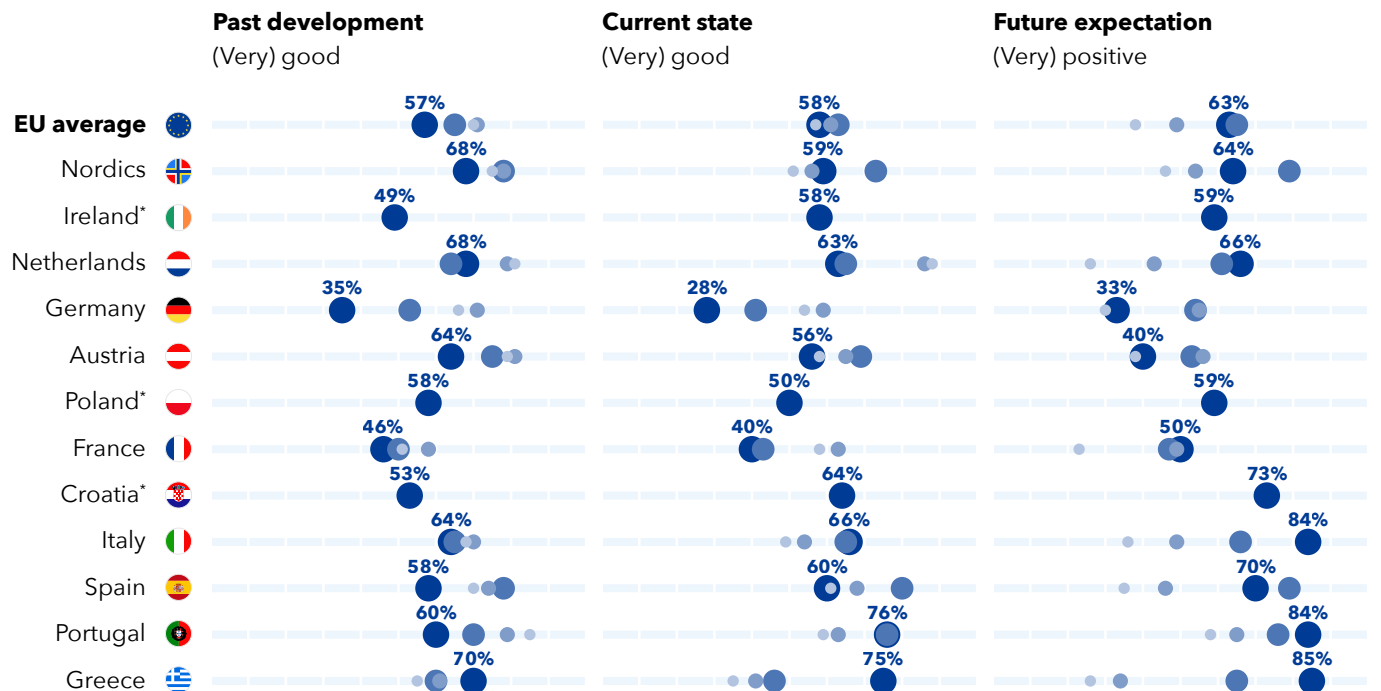
Despite geopolitical frictions and economic uncertainty, European accommodations report a broadly optimistic outlook, stabilizing at a high point. The ratio of positive to negative sentiment paints a clear picture of resilience and strength across the sector. While fewer hoteliers now describe past and present business performance as (very) good compared to previous waves, negative assessments remain rare. Encouragingly, expectations for the 2025 travel season remain high, with about two-thirds of European hoteliers anticipating positive developments in the months ahead.

Accommodations' perception of their economic development



The perception of stable development, coupled with optimism for the future, is largely reflected across European countries – though variations persist. On the positive end of the spectrum are Greece, Portugal and Italy, where accommodations reported leading sentiment across all three metrics and consistent year-over-year improvement – marking the highest levels recorded to date. Germany stands out as the clearest outlier, bucking this trend, with sentiment shifting toward pessimism: in 2025, perceptions of past, present, and future business performance reached all-time lows.

Accommodations' perception of business development, by country



*Ireland, Poland, and Croatia are new additions as stand-alone countries in the 2025 Accommodation Barometer.

European accommodations continue to report growth in average daily rates (ADRs) and occupancy rates, with the trend line stabilizing here as well. The perceived ease of access to capital remains the same compared to 2024, with two-fifths of European respondents reporting no difficulty compared to one-fifth of those who reported having problems.

Development of accommodation business in the last 6 months

■ 2025 ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Average room rate

(Strongly) increased ■



■ (Strongly) decreased

Occupancy rate

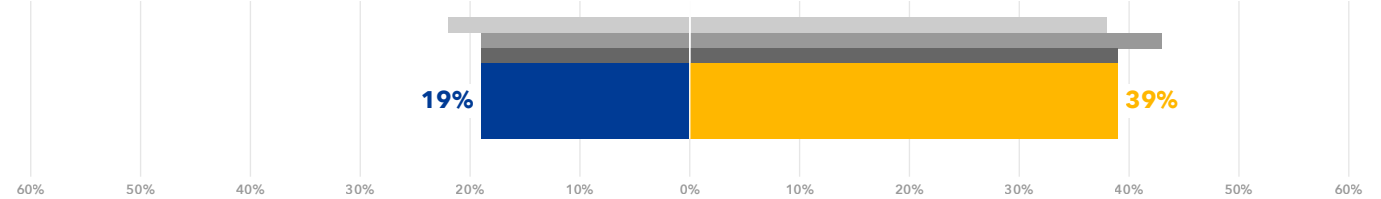
(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

Not difficult (at all) ■

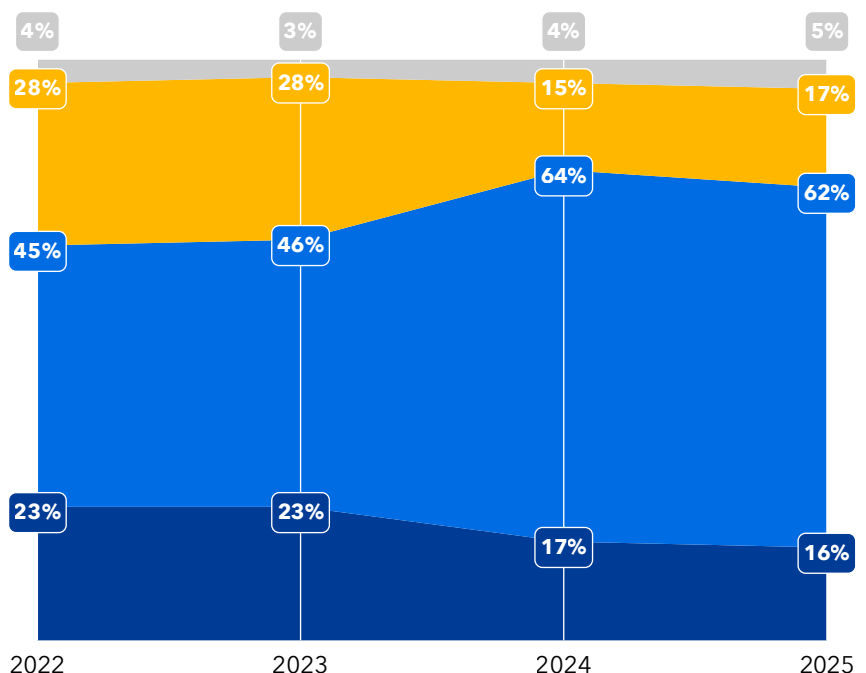


Continuing the trend observed in the 2024 Barometer wave, most hoteliers in this year's survey (62%) choose to maintain a steady course of investment for the coming months. The rest of the respondents are evenly split between planning to invest more (17%) or less (16%).

Compared to bigger accommodations, small and medium properties showed a greater inclination to cut funding than to maintain the current pace of investment. A similar trend can be observed when looking at star classification: lower-star hotels tend to report more conservative investment plans compared to their higher-star counterparts.

Compared to the last 6 months, investment plans for the next 6 months

■ Less ■ About the same ■ More ■ Don't know

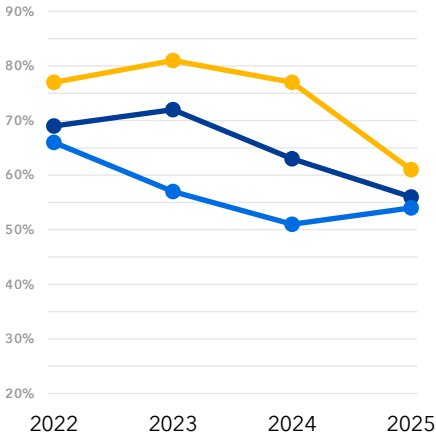


Chains continue to lead across all sentiment measures compared to independent hotels and alternative accommodations

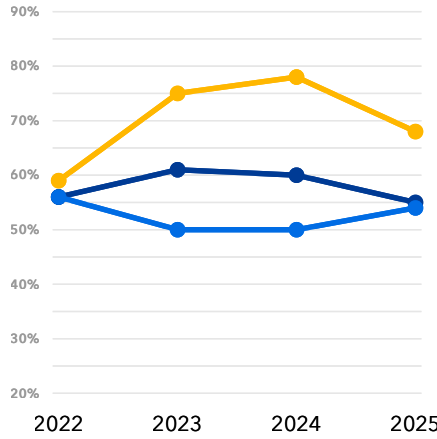
Europe-wide perception of business development, by accommodation type

■ Chain hotels ■ Independent hotels ■ Alternative accommodations

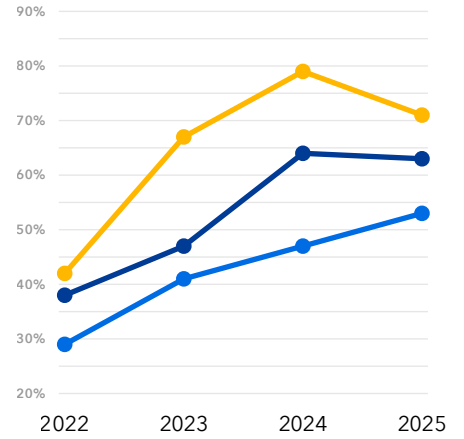
General development in the past 6 months
(Very) good



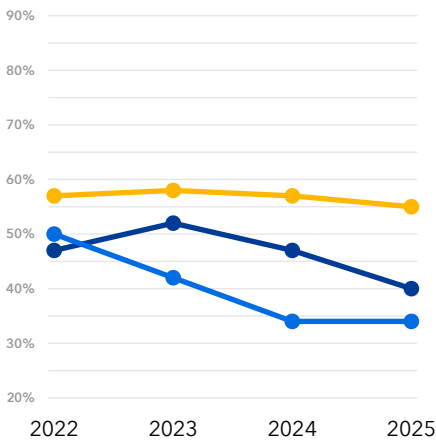
Current economic situation
(Very) good



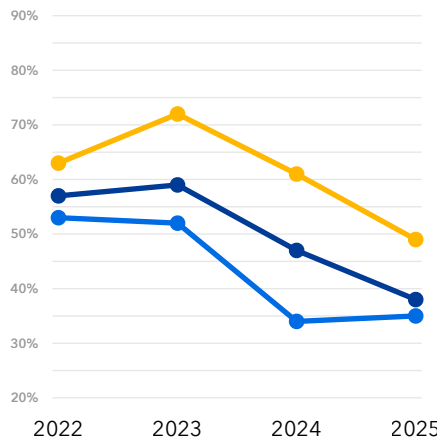
Economic situation in the next 6 months
(Very) positive



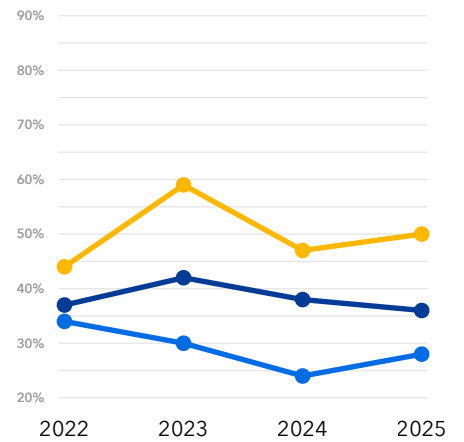
Development of average daily rate
(Strongly) increased



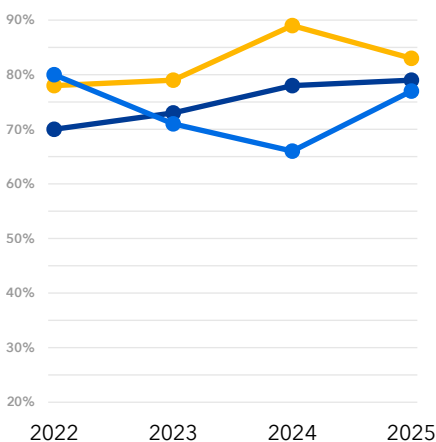
Development of occupancy rate
(Strongly) increased



Access to financing and capital
Not difficult (at all)



Investment plans
Invest about the same or more
(than the last 6 months)



Across Europe, chain hotels continue to report stronger sentiment on nearly all metrics, including economic conditions, business performance indicators, and pricing trends. Independent hotels and alternative accommodations continue to lag in their development.

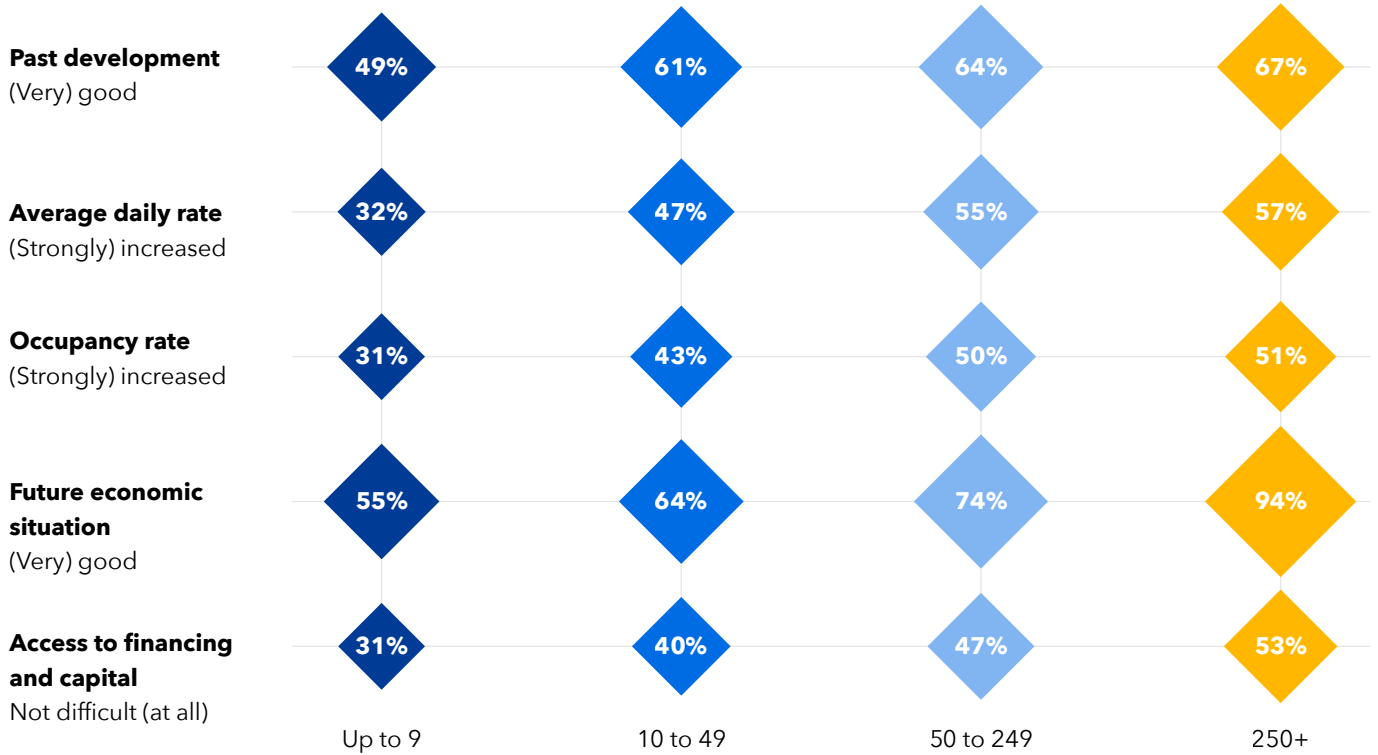
Despite these differences, investment intentions are one area where all three accommodation types converge, with most respondents planning to invest at least as much as in the previous six months. This suggests that, while expectations have cooled slightly post-“revenge travel”, hoteliers across Europe are not retreating from long-term commitments, likely anticipating continued healthy demand growth.

Access to financing remains a challenge for smaller operators, with chain hotels consistently reporting greater ease, a likely factor behind the persistent sentiment gap across segments.

Size and star classification matter

Closely linked to the comparative advantage of hotel chains, size is another factor that correlates strongly with the success of accommodation businesses. Large properties of 250 employees or more were more likely than smaller businesses to rate their economic situation, occupancy rate, and past developments as positive or very positive.

Accommodations business development, by number of employees



Larger accommodations also reported easier access to capital and more positive outlooks for the future. Similarly, the star classification of a hotel also correlates with its reported sentiment: the more luxurious a hotel is, the more positive the sentiment.



Old city center in Kraków, Poland

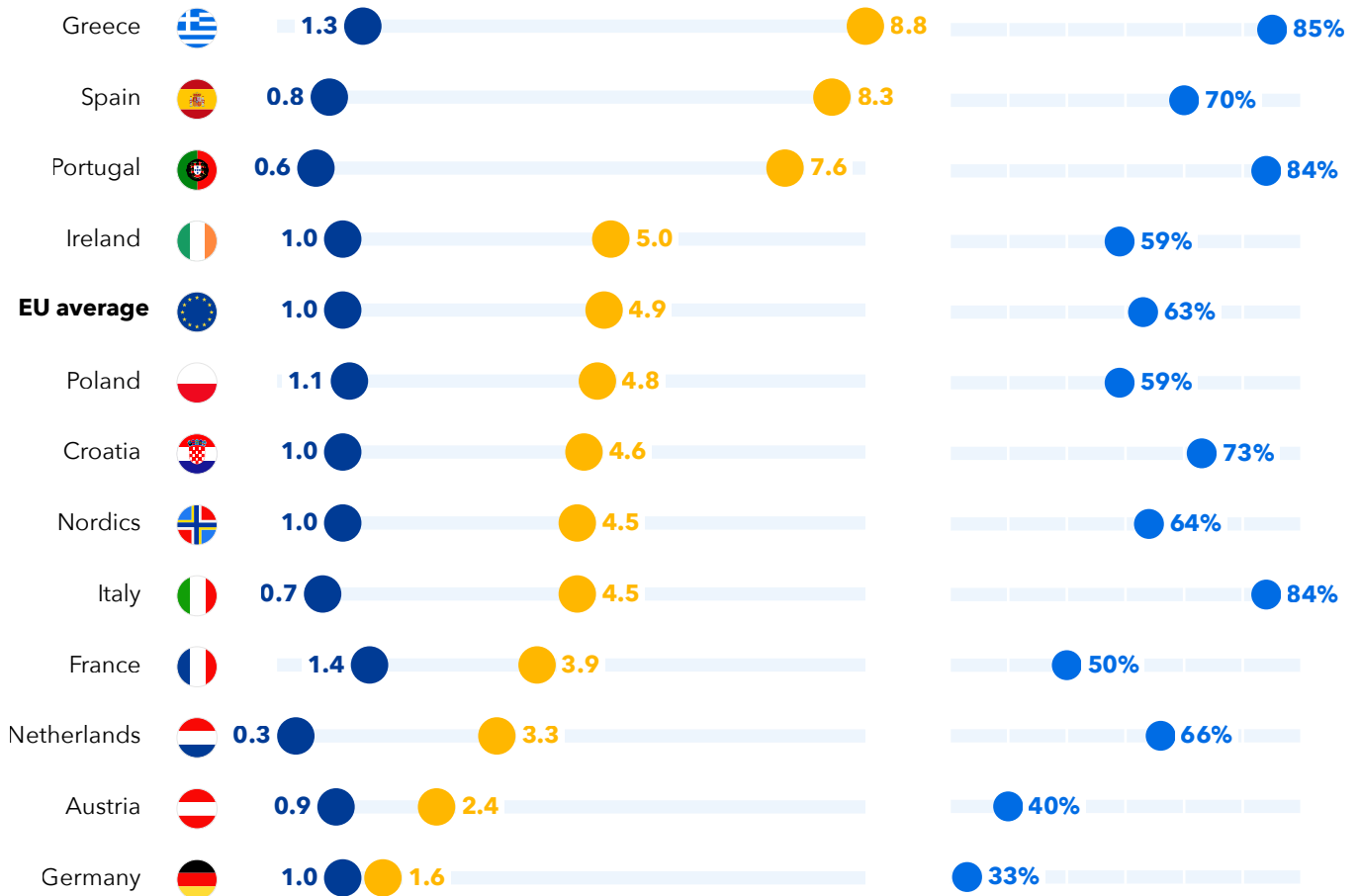
Labor and Staffing

Greek accommodations most keen to hire

On average, European hotels plan to hire 3.59 employees over the next 12 months. This number varies significantly between independent and chain hotels. Independent hotels plan to hire 2.72 employees, while for chain hotels the number rises to 5.85. There is a correlation between hiring needs and accommodation size (number of beds, number of employees) and star classification. The bigger the business or the more upscale, the greater the hiring needs for the next 12 months.

Number of hires planned for the next 12 months*

● Microenterprises (0-9 employees) ● All other properties (10+ employees)



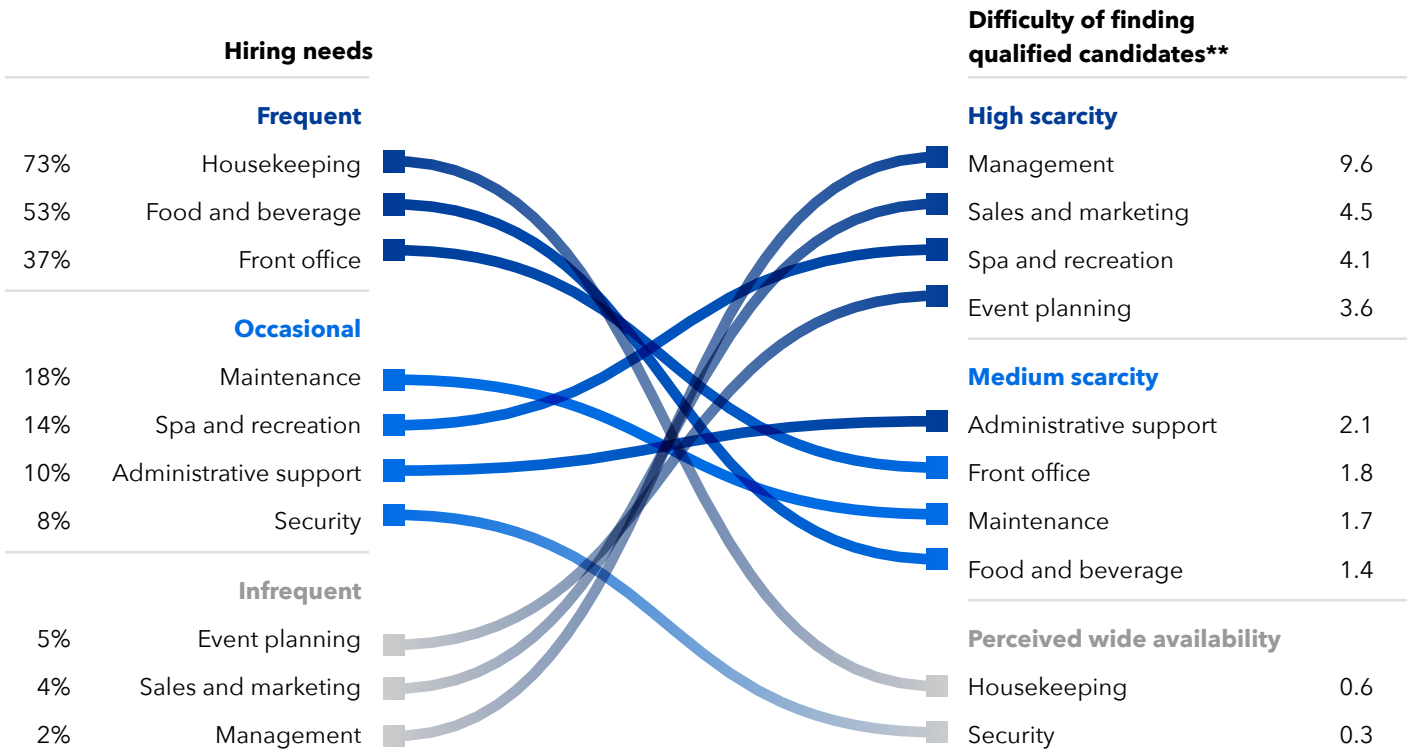
*Data is partly based on small sample sizes.

There is also significant variation among EU Member States. At the top of the scale, Greek hoteliers are looking to hire 7.45 employees while their German counterparts only plan on hiring 1.43. In fact, Germany, Austria, and France stand out with more than half of all hotels not looking to hire anyone over the next 12 months.

One interesting relationship is between hiring plans and future business expectations of accommodations. For microenterprises, hiring needs are essentially the same across countries. However, for larger properties, it significantly varies, and there is a strong correlation with future business expectations on a country level. One interpretation is that this represents much of the seasonal hiring in the accommodation sector and will be adjusted in line with business sentiment and economic conditions.

The most frequent hiring needs of accommodations are in relatively low-skilled, often seasonal roles: housekeeping, F&B, and front office. This holds true across all EU Member States. These roles are also the easiest to fill. For example, only 27% of businesses looking to hire housekeepers in the next 12 months are experiencing difficulties in filling these vacancies.

In contrast, managerial roles (e.g., general manager; sales, revenue, and marketing staff) are the hardest to fill. For every accommodation that found it easy to hire managers, almost 10 reported difficulty.



**Figures are ratios obtained by dividing the share of respondents answering "(very) difficult" by the share of respondents answering "(very) easy"

Geirangerfjord, Norway



High salary expectations and a perceived lack of work-life balance are two leading challenges European accommodations face when trying to hire qualified candidates. This perception is largely shared across different countries, although country variations do exist: in France, long commutes (50%) and limited career growth opportunities (48%) are the top challenges instead. Lack of job stability is a top concern for Greek accommodations (58%), although this isn't a big problem in Germany (18%).

52%
52% of hoteliers say that the work-life balance in the accommodations industry is a barrier to finding qualified staff.

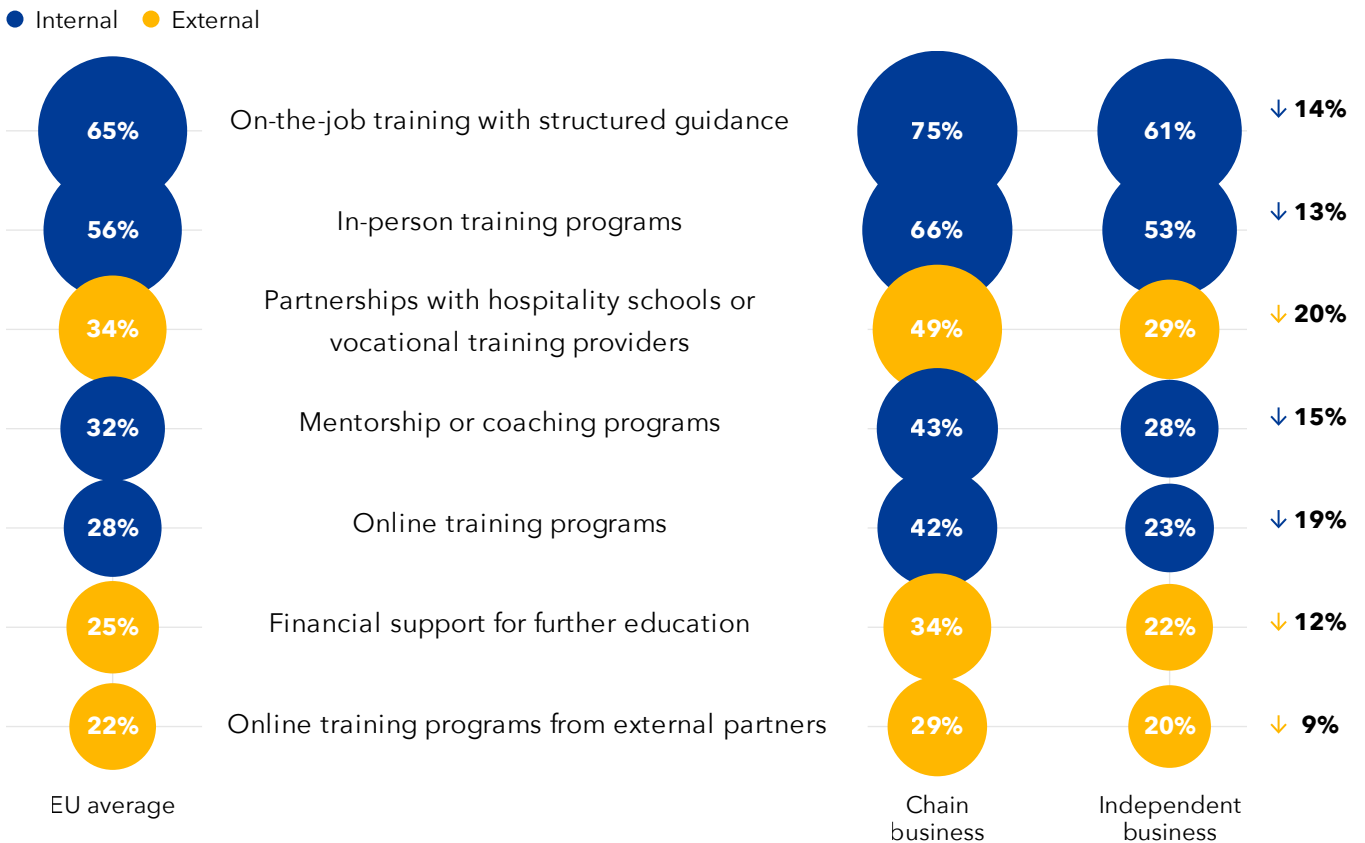
| Key barriers to finding and hiring staff | EU average | Nordics | Ireland | Netherlands | Germany | Austria | Poland | France | Croatia | Italy | Spain | Portugal | Greece |
|---|------------|---------|---------|-------------|---------|---------|--------|--------|---------|-------|-------|----------|--------|
| | | | | | | | | | | | | | |
| High salary expectations | 56% | 63% | 46% | 59% | 53% | 49% | 60% | 39% | 56% | 70% | 56% | 58% | 61% |
| Unsuitable working hours or work-life balance | 52% | 52% | 49% | 49% | 39% | 33% | 58% | 43% | 48% | 66% | 58% | 58% | 69% |
| Lack of necessary skills or experience | 47% | 41% | 43% | 43% | 40% | 41% | 45% | 41% | 48% | 59% | 48% | 51% | 49% |
| Poor perception of the hospitality industry | 45% | 44% | 51% | 46% | 27% | 34% | 44% | 37% | 50% | 53% | 51% | 54% | 51% |
| Long commutes | 45% | 48% | 39% | 49% | 38% | 35% | 43% | 50% | 49% | 50% | 53% | 56% | 40% |
| Seasonality or job stability concerns | 45% | 52% | 40% | 45% | 18% | 31% | 44% | 43% | 56% | 53% | 54% | 53% | 58% |
| Limited career growth opportunities | 42% | 38% | 48% | 43% | 11% | 24% | 43% | 48% | 56% | 43% | 56% | 50% | 53% |
| Language barriers | 37% | 36% | 24% | 39% | 41% | 54% | 39% | 26% | 35% | 38% | 35% | 39% | 41% |

Training and Upskilling

Most staff training is done in-house, but external providers also play a role

European accommodations rely primarily on in-person and on-the-job training. However, a sharper divide appears when comparing upskilling efforts between chain and independent businesses: the former utilizes different training programs at higher rates more consistently. In fact, 17% of all independent properties do not offer any training at all while the same is true for only 2% of chain properties.

Current employee development practices



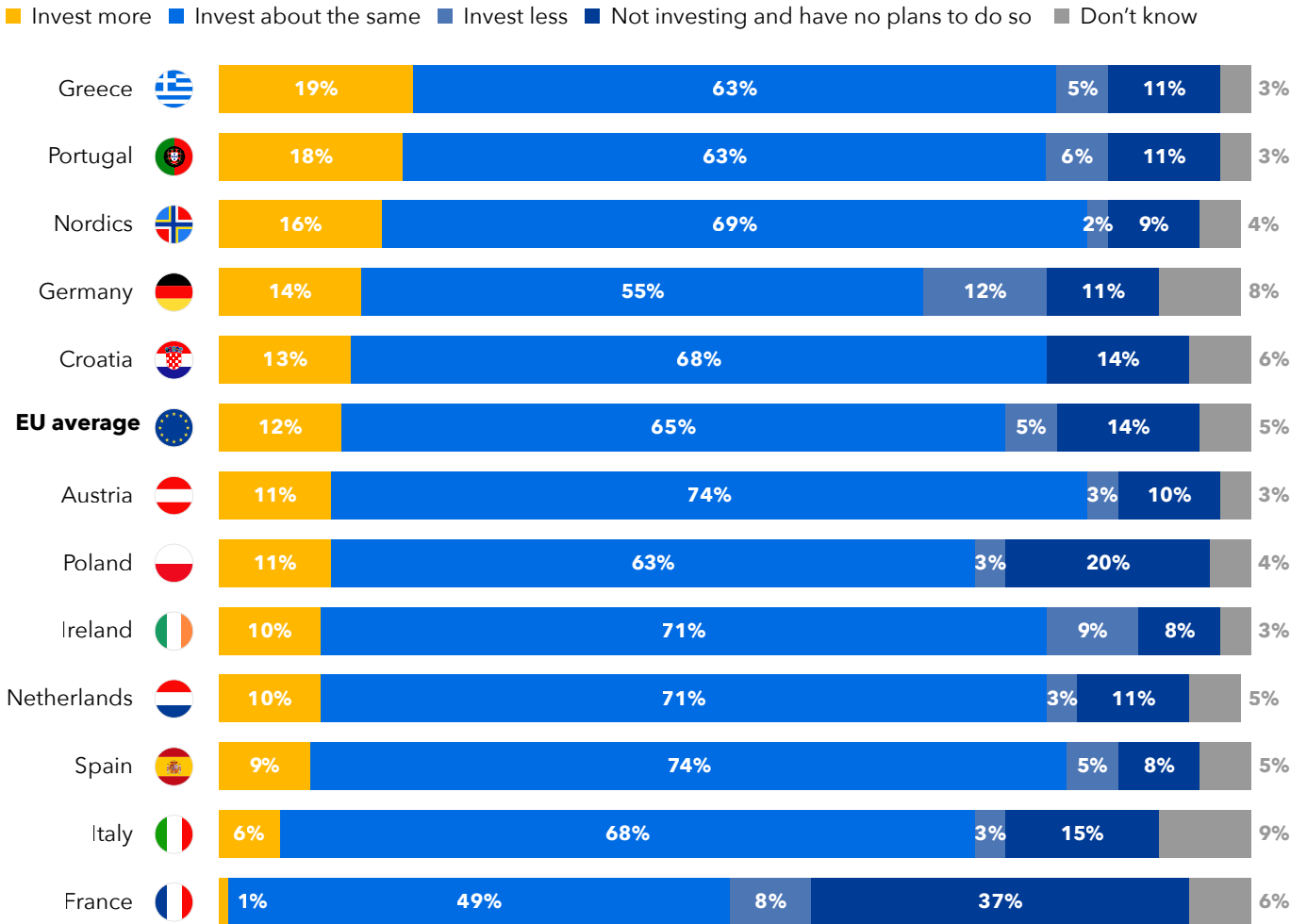
Kleinwalsertal, Austria

A majority of accommodations offer structured on-the-job (65%) and in-person training (56%). This is true across all EU Member States. When it comes to cooperation with external training providers (e.g., hospitality schools, vocational education institutions) as well as online training programs, a gap emerges between chain and independent properties. While half (49%) of chain businesses have external training programs in place, this is only true for less than a third (29%) of independent businesses. Likewise, 42% of chain accommodations offer online training programs. The same is only true for less than a quarter of independent accommodations.

These results underline the challenge of closing the skills gap in Europe’s tourism sector, where about 80% of accommodations in Europe are small and independent.

Overall, the majority of accommodations (65%) plan to maintain their current level of investment in skills development, while 12% intend to increase spending and only 5% expect to reduce it. Notably, investment intentions vary significantly across Member States, with businesses in countries experiencing more positive business sentiment showing greater willingness to invest, and those in less optimistic markets tending to scale back.

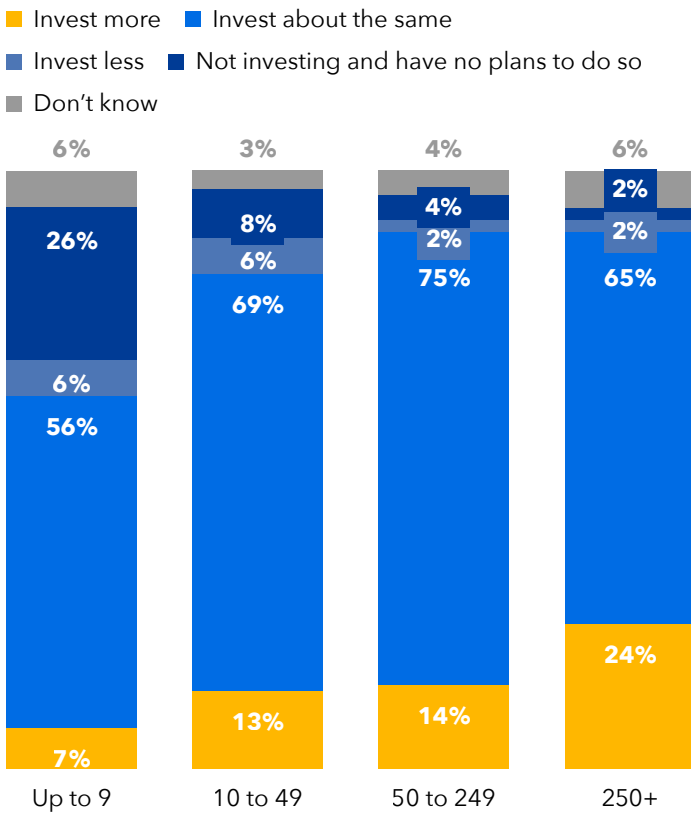
Investment intentions in upskilling hold steady (in the next 6 months compared to the last 6 months)



Vers-Pont-du-Gard, France



Investment plans related to employee development in the next 6 months, by number of employees

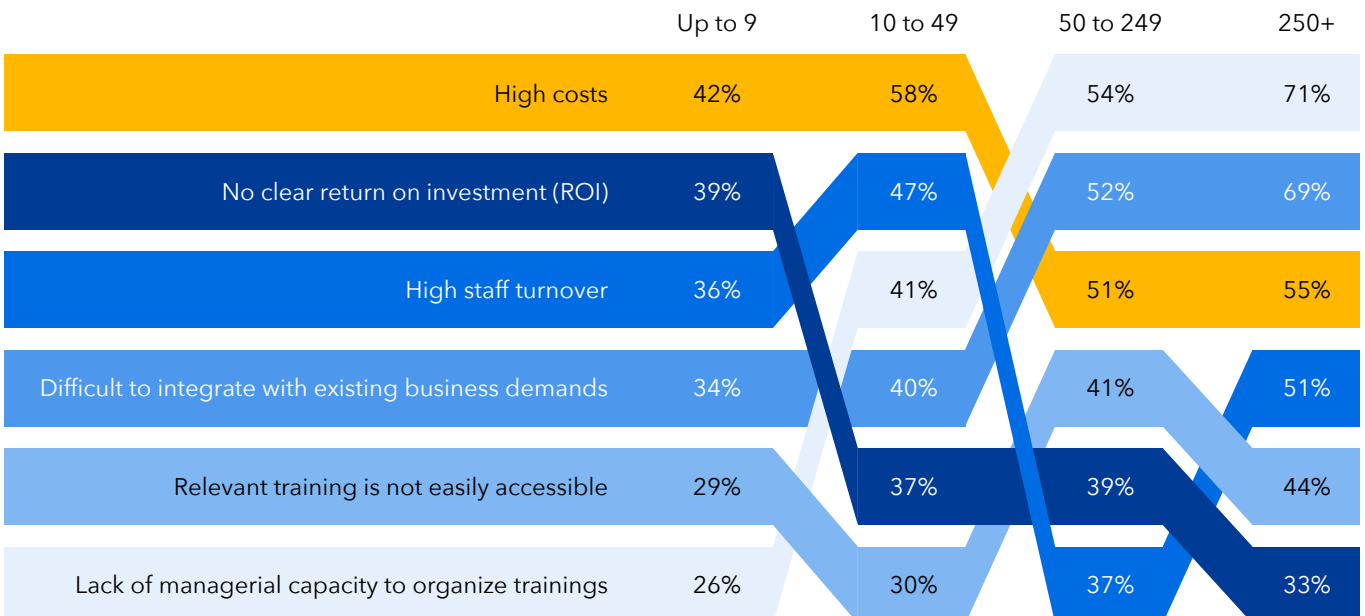


Cliffs of Moher, Ireland

A clear gap between chain and independent properties emerges once again when it comes to planned investments in skills development. Nearly one in five independent accommodations (18%) report no intention to invest in this area over the next six months, compared to just 4% of chain-affiliated properties. For small properties with up to 9 employees, this number rises to 26%.

Among those hotels planning to invest in skills development, high costs and lack of managerial capacity are the leading reasons not to invest more.

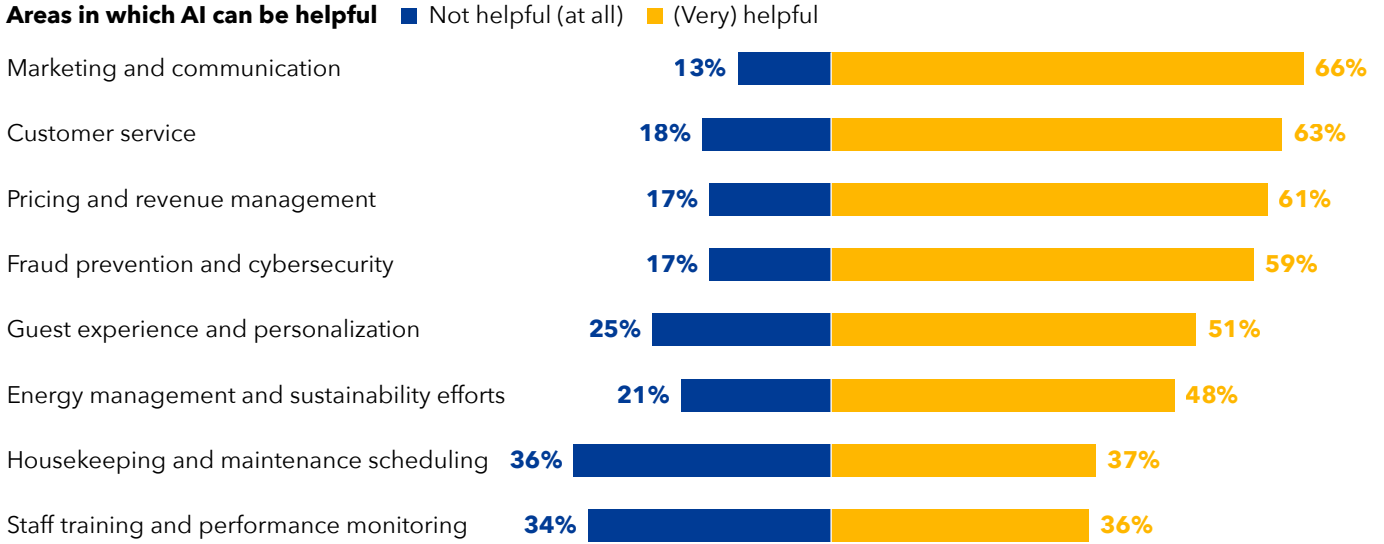
Barriers to greater staff training investment among accommodations planning to upskill, by number of employees



Technology Adoption

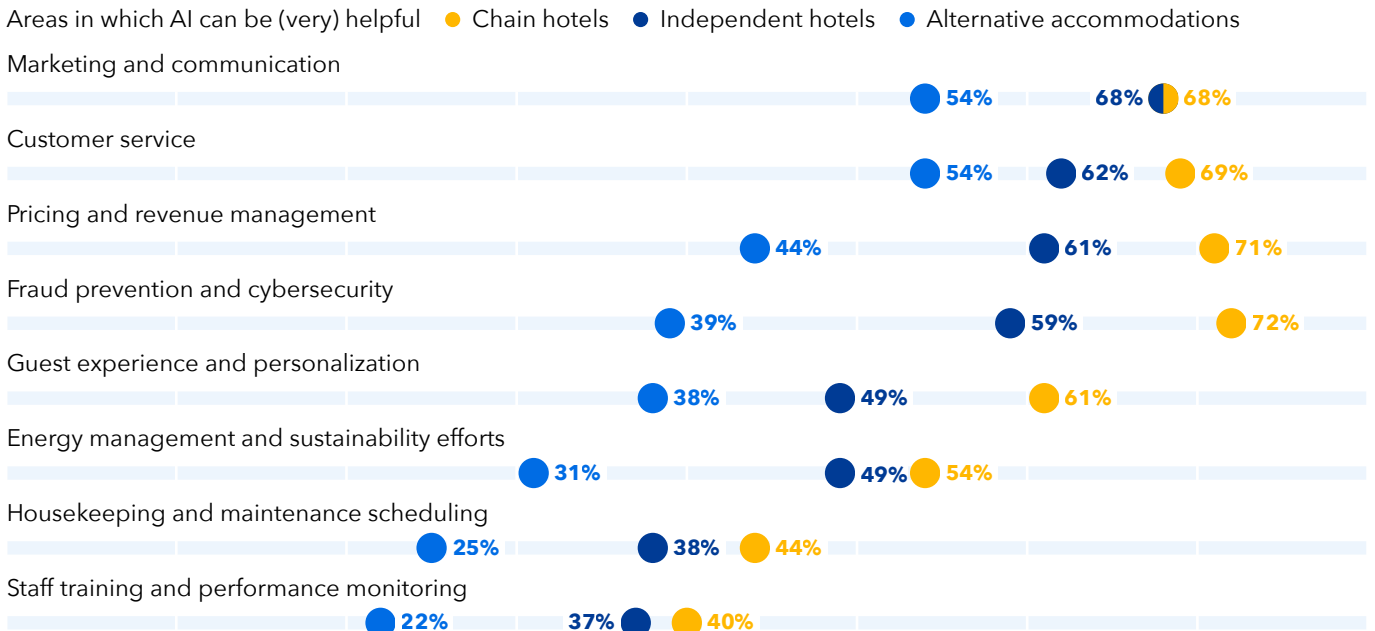
AI has advocates in all use cases

Many European hoteliers recognize the potential benefits of AI for their business. Marketing, customer service, and revenue management are seen as the most promising areas, while for more operational tasks – such as housekeeping schedules and staff training – accommodation managers appear more skeptical about the value AI can deliver.
















Chain hotels are more optimistic about the potential of AI across nearly every use case - from marketing and customer service to energy management and fraud prevention. Their larger scale, greater technical capacity, and proprietary systems likely make AI integration more feasible and rewarding. By contrast, alternative accommodations and independent hotels show notably lower levels of enthusiasm, particularly for operational use cases like staff training and maintenance scheduling. For smaller players, the perceived cost, complexity, and limited ROI of AI tools may outweigh the benefits. The gap underscores a growing digital divide in the sector - where scale and standardization enable tech diffusion, but fragmentation and resource constraints slow adoption elsewhere.

AI enthusiasm varies by accommodation type



Three in five European accommodations cite high implementation costs and complexity of integration with existing systems as barriers to adopting digital technologies and AI. On the country level, French and Italian hoteliers appear more skeptical about the return on investment (ROI) of technological implementations, whereas Polish accommodations appear more concerned with data security.

| Barriers to digital technology adoption | EU average | Nordics | Ireland | Netherlands | Germany | Austria | Poland | France | Croatia | Italy | Spain | Portugal | Greece |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| |  |  |  |  |  |  |  |  |  |  |  |  |  |
| High implementation costs | 61% | 63% | 64% | 56% | 47% | 55% | 63% | 56% | 64% | 69% | 65% | 61% | 66% |
| Complexity of integration with existing systems | 58% | 60% | 58% | 48% | 49% | 51% | 53% | 53% | 60% | 69% | 68% | 65% | 64% |
| Lack of technical expertise within the team | 53% | 50% | 50% | 54% | 46% | 43% | 61% | 51% | 58% | 58% | 59% | 59% | 46% |
| Lack of awareness about available solutions | 51% | 48% | 53% | 49% | 41% | 46% | 50% | 51% | 53% | 63% | 50% | 51% | 56% |
| Unclear return on investment (ROI) | 50% | 51% | 51% | 48% | 35% | 36% | 54% | 62% | 55% | 63% | 51% | 54% | 45% |
| Concerns about data security and privacy of my accommodation business | 47% | 50% | 44% | 41% | 36% | 45% | 59% | 50% | 49% | 48% | 48% | 48% | 50% |
| Resistance to change among staff | 37% | 37% | 35% | 34% | 42% | 33% | 38% | 38% | 46% | 34% | 36% | 39% | 26% |



 **High costs** are the biggest challenge when implementing digital technologies

Old town in Porto, Portugal

Appendix

Country Insights

| | | |
|---|-------------|--------|
|  | Nordics | Pg. 18 |
|  | Ireland | Pg. 18 |
|  | Netherlands | Pg. 19 |
|  | Germany | Pg. 19 |
|  | Austria | Pg. 20 |
|  | Poland | Pg. 20 |
|  | France | Pg. 21 |
|  | Croatia | Pg. 21 |
|  | Italy | Pg. 22 |
|  | Spain | Pg. 22 |
|  | Portugal | Pg. 23 |
|  | Greece | Pg. 23 |

List of survey questions

Pg. 24

Methodology

Pg. 25

The Nordic countries

Nordic accommodations continue to report stable and optimistic sentiment, with expectations for 2025 remaining high. Past and current performance assessments remain above or on par with EU averages, although access to capital becomes more difficult, and investment appetite remains muted.

Nordic hoteliers' hiring needs appear relatively low compared to their European counterparts, although high salary expectations were cited as a key hiring challenge. Most staff training is conducted in-house, while Nordic hoteliers' investment interest in upskilling is higher than the EU average. Visa restrictions emerge as the top challenge in hiring foreign workers, alongside higher administration burden and language barriers.

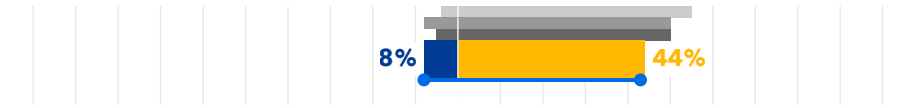
Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Development of average room rate

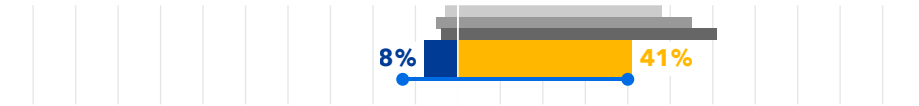
(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

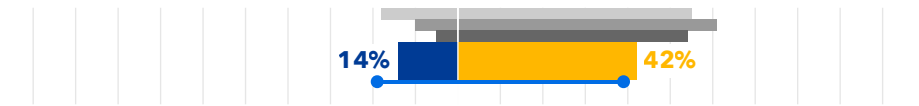
(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

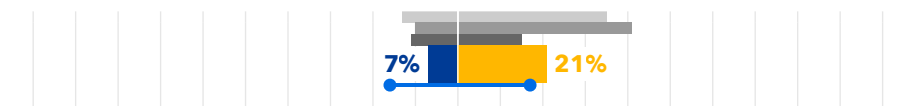
Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

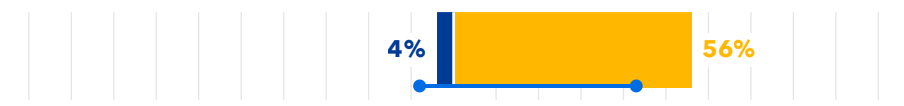
Development of accommodation business in the last 6 months

■ 2025 ● EU average

■ (Strongly) decreased

Development of average room rate

(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Ireland

The Accommodation Barometer debut for Ireland paints a picture that largely aligns with the overall sentiment in Europe: optimism amid stable growth. Six out of ten Irish accommodations reported a positive future outlook, supported by steady development of room rates, occupancy, and access to finance.

While AI is widely embraced for marketing and revenue management, implementation is hindered by cost concerns and technical barriers. Staff training is a priority and the willingness to invest in upskilling is steady. Rising labor costs - having squeezed profitability for 86% of Irish accommodations - are seen as a key challenge and there have been prompt calls for government support.

Netherlands

The sentiment in the Dutch accommodation industry remains positive, with business conditions stabilizing and optimism growing for the 2025 season. Despite strong perceived growth of occupancy and room rates, investment appetite remains subdued.

Dutch hoteliers' hiring needs appear relatively low compared to their European counterparts, although high salary expectations were cited as a key recruitment challenge. While technology adoption is limited by cost, a perceived skills gap, and a shortage of technical know-how, interest in using AI is high, especially in revenue management and marketing. Despite ongoing challenges, such as the VAT hikes in 2026, Dutch hoteliers maintain confidence in the sector's long-term resilience.

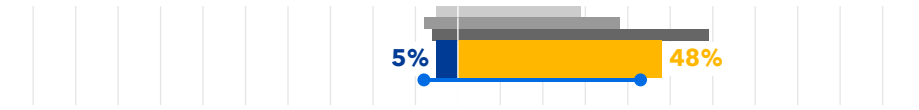
Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Development of average room rate

(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

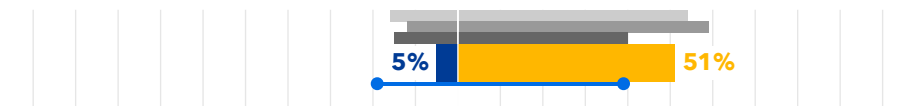
(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

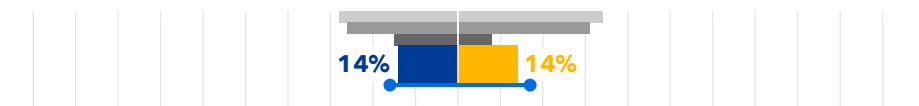
Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Development of average room rate

(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

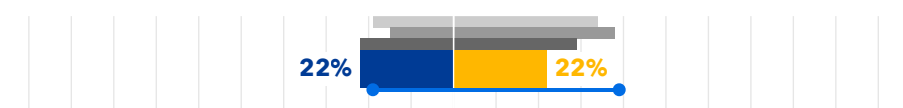
(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

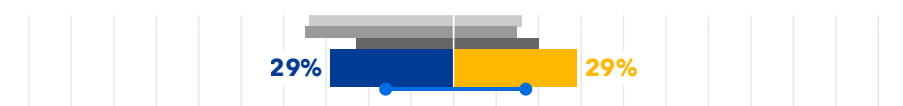
Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Germany

German accommodations are navigating a challenging economic environment, which is reflected in the business sentiment. Hoteliers assessed their recent business performance well below the European average and expressed dampened expectations for 2025. Only one-third reported a positive economic outlook, and perceptions of access to capital and occupancy rate developments have further weighed on confidence.

Despite this, the level of investment appetite appears to be holding up, although it is somewhat polarized. The low economic sentiment may explain the flat recruitment outlook – the lowest in Europe.

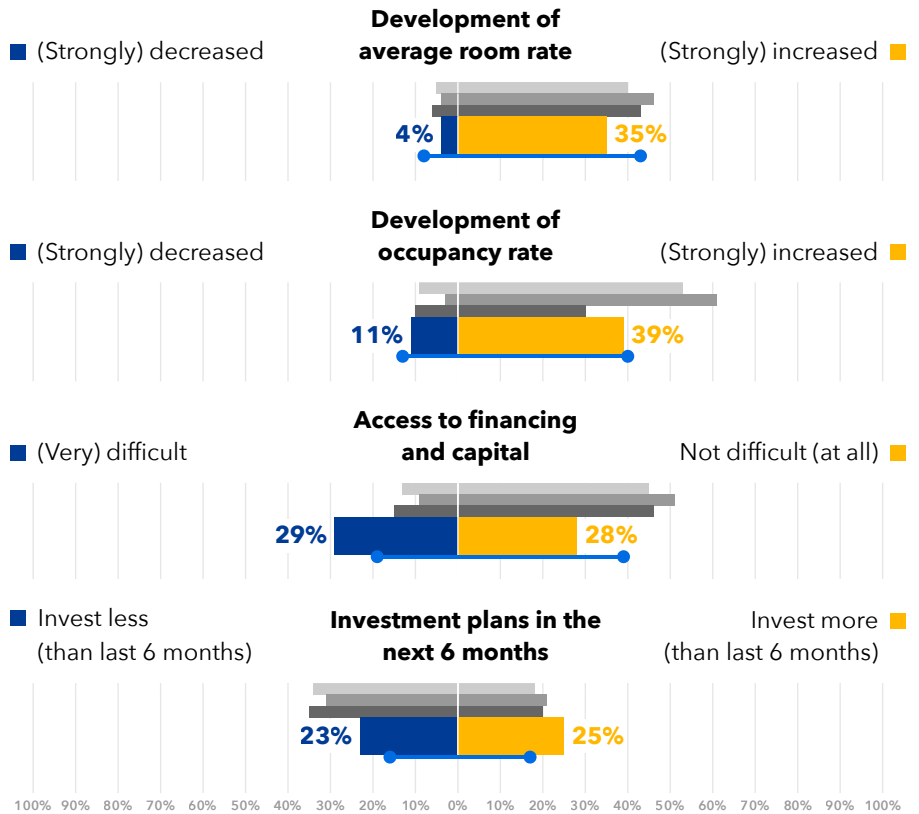
Austria

Despite stable business performance reported by Austrian accommodations, sentiment for the 2025 season has turned cautious, with only two in five expecting positive future development, below the EU average. Although access to financing is perceived as more difficult than in previous years, investment appetite has increased.

The muted economic outlook correlates with Austrian hoteliers' low hiring needs, though they do prioritize staff training. Interest in AI is strongest in marketing, while many hoteliers remain skeptical about its value in operational tasks. Foreign workers are widely employed, with language barriers cited as the main challenge.

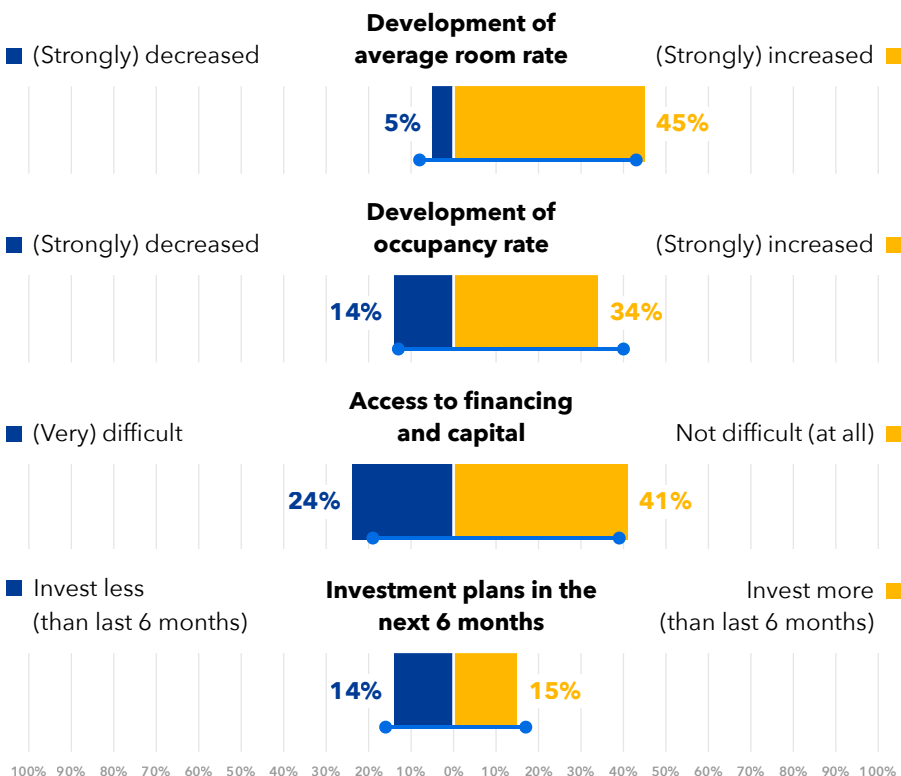
Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022



Development of accommodation business in the last 6 months

■ 2025 ● EU average



Poland

In this debut edition of the Accommodation Barometer for Poland, reported business development largely aligns with overall sentiment in Europe: optimism amid stable growth. Six in ten Polish accommodations have a positive future outlook, supported by the steady development of room rates, occupancy, and access to capital. Interest in utilizing AI is relatively high, especially for customer service and revenue management.

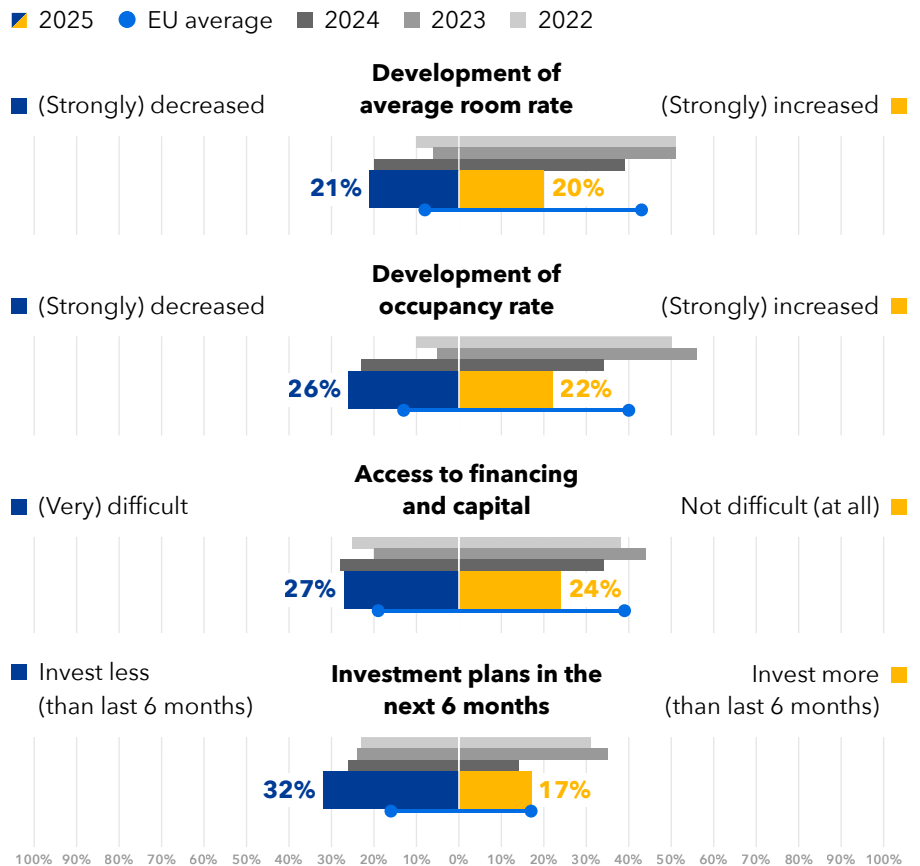
High salary expectations and work-life balance concerns pose a challenge to hiring, and many hoteliers have turned to foreign workers despite language and administrative hurdles.

France

French hoteliers remain optimistic heading into 2025. Half of those surveyed anticipate positive prospects in 2025, while only a small minority – one in ten – expect business conditions to worsen. Still, overall sentiment trails the EU average. Perceptions of economic uncertainty, along with reported dissatisfaction with room rates and occupancy trends, have tempered expectations. This more subdued outlook is reflected in limited hiring appetite and relatively low investment in training and infrastructure.

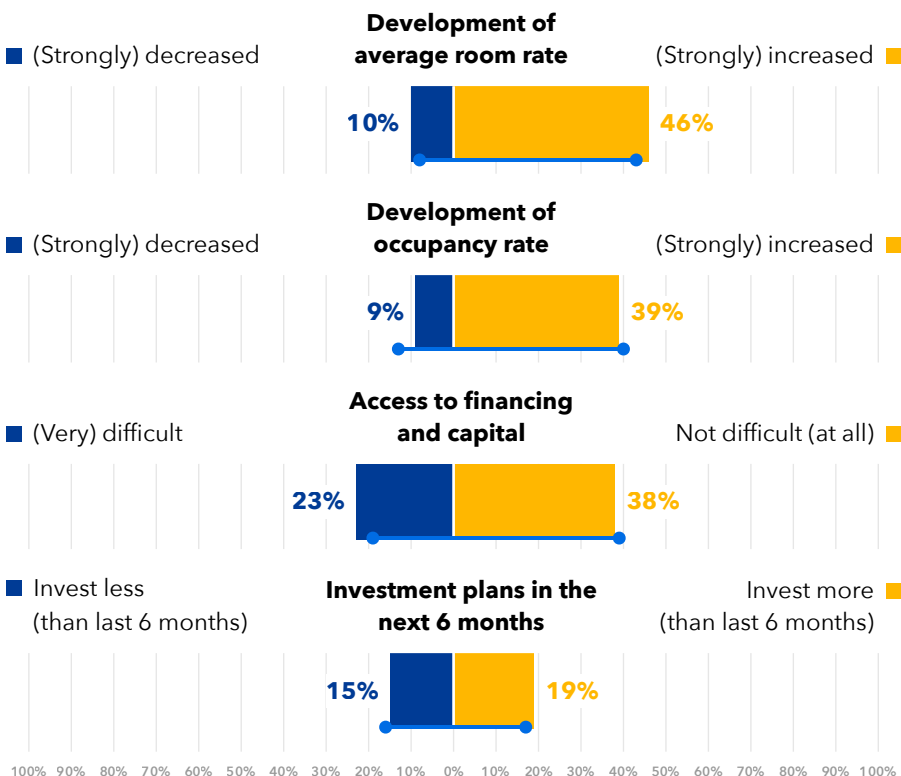
Interest in AI also lags behind the EU average, likely due to concerns about unclear returns and implementation costs. Tourism infrastructure is broadly viewed as adequate, and there is support for further government action to strengthen sector resilience.

Development of accommodation business in the last 6 months



Development of accommodation business in the last 6 months

Legend: 2025 (yellow), EU average (blue)



Croatia

This Accommodation Barometer debut shows Croatian hoteliers heading into the 2025 season with rising confidence. Recent business performance is strong, and most respondents view their current economic situation positively. Three in four expect further improvement – one of the higher optimism levels in Europe. Staff training is a clear priority, and AI is broadly seen as beneficial, particularly in marketing and customer service. Hiring challenges persist, with many turning to foreign workers despite bureaucratic and language barriers.

 Italy

Italian accommodations exhibit strong optimism, with stable current economic sentiment and exceptionally high expectations for the 2025 season - 84% anticipate positive development and virtually no one (1%) is feeling gloomy. Access to capital has improved noticeably, supporting this outlook, though investment appetite remains measured.

The positive perspective towards the future among Italian accommodations also correlates with their relatively high recruitment needs, although many point to mismatched salary expectations as a core hiring barrier. Despite challenges such as rising operational costs and tax burdens, Italian accommodations continue to scale new peaks.

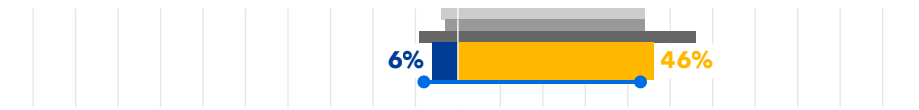
Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Development of average room rate

(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

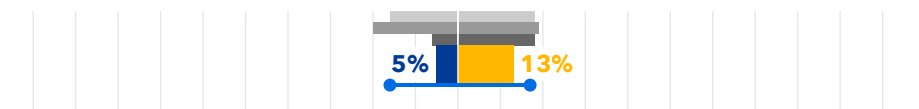
Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



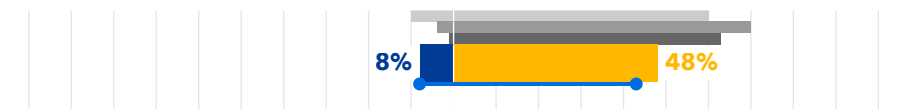
Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Development of average room rate

(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

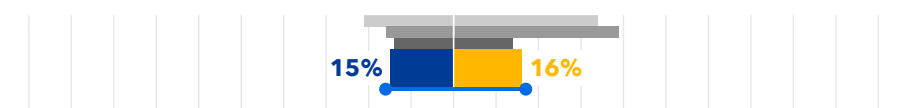
Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



 Spain

While optimism has softened compared to previous Barometer editions, Spanish accommodations continue to report strong business performance, matching or exceeding the EU average. Expectations for the 2025 season remain high – 70% anticipate positive developments, and only 3% disagree. Hiring appetite is among the highest in Europe, reflecting broad confidence in the future. There is also significant interest in staff training and upskilling, though high labor costs and staff turnover are key obstacles. AI is widely embraced, particularly for fraud prevention and cybersecurity, despite technical challenges to implementation. Accommodation operators are split on new traveler data rules, citing legal uncertainty and longer check-in times as major issues.

 **Portugal**

Optimism remains high among Portuguese accommodations heading into the 2025 travel season, with steady development observed across key performance indicators. Access to capital has improved overall, likely supported by stable growth in room rates and occupancy.

Portuguese hoteliers are more invested in staff training than the EU average, with a majority intending to further strengthen their commitment to upskilling. Many view AI as a helpful tool, particularly for customer engagement and marketing. Overall, an overwhelming majority (84%) of Portuguese accommodations look to the future with heightened confidence.

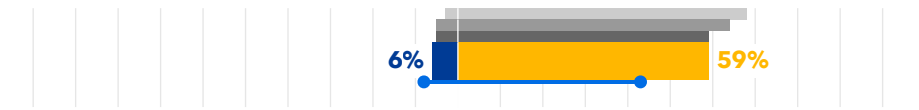
Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Development of average room rate

(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

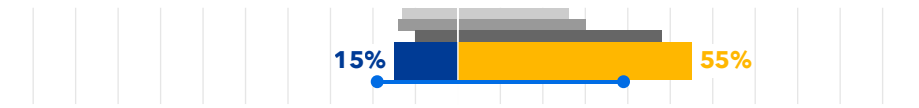
(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

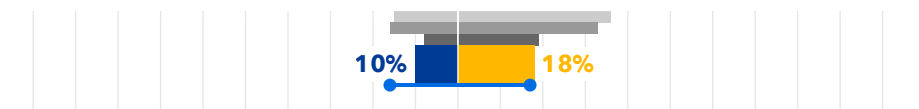
Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

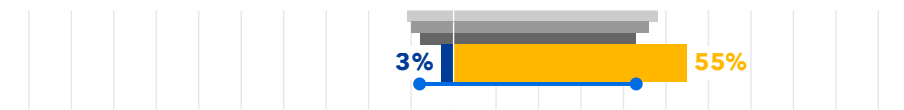
Development of accommodation business in the last 6 months

■ 2025 ● EU average ■ 2024 ■ 2023 ■ 2022

■ (Strongly) decreased

Development of average room rate

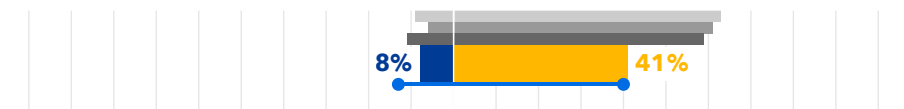
(Strongly) increased ■



■ (Strongly) decreased

Development of occupancy rate

(Strongly) increased ■



■ (Very) difficult

Access to financing and capital

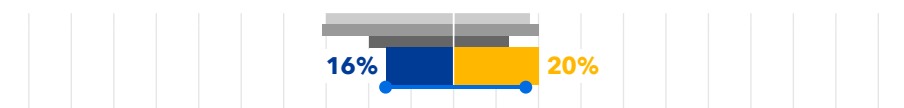
Not difficult (at all) ■



■ Invest less (than last 6 months)

Investment plans in the next 6 months

Invest more (than last 6 months) ■



100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

 **Greece**

Greek accommodations are increasingly confident in their outlook, with business sentiment notably stronger than in previous years and surpassing the EU average for the first time. The perceived ease of capital access has grown substantially as well, improving investment confidence. The strong economic sentiment correlates with Greek hoteliers' hiring appetite, the highest in Europe.

Greek accommodations place strong emphasis on staff training – more so than their European peers – and show considerable interest in AI. The overall mood among Greek hoteliers is optimistic and forward-looking, with an overwhelming 85% of respondents expecting growth in the near future.

List of Survey Questions

- How do you characterize the development of your accommodation business in the last 6 months? (Answers are on a scale of 1 to 5, from “very poor” to “very good”.)
- How did the average daily rate (ADR) of your accommodation business develop during the last 6 months? (Answers are on a scale of 1 to 5, from “strongly decreased” to “strongly increased”.)
- How did the occupancy rate of your accommodation business develop during the last 6 months? (Answers are on a scale of 1 to 5, from “strongly decreased” to “strongly increased”.)
- How would you characterize current overall economic situation of your accommodation business? (Answers are on a scale of 1 to 5, from “very poor” to “very good”.)
- How do you characterize the current access to financing and capital of your accommodation business? (Answers are on a scale of 1 to 5, from “very difficult” to “not difficult at all”.)
- In comparison to the last 6 months, what are the investment plans of your accommodation business for the next 6 months? You will...? (Answers are “...invest less than during the last 6 months”, “...invest about the same”, and “...invest more than during the last 6 months”.)
- Thinking about the next 6 months: how do you think the economic situation of your accommodation business will develop? (Answers are on a scale of 1 to 5, from “very negative” to “very positive”.)
- How many people do you plan to hire within the next 12 months?
- For which positions do you plan to hire someone within the next 12 months? (Multiple answers are possible.)
- How difficult is it to find qualified candidates for your accommodation business in general? (Answers are on a scale of 1 to 5, from “very hard” to “very easy”, in relation to the positions mentioned in the previous question.)
- How challenging do you find various aspects (e.g. skill levels, salary expectations, language barriers, etc.) when it comes to finding and hiring staff? (Multiple answers are possible; answers are on a scale of 1 to 5, from “very challenging” to “not challenging at all”.)
- How do you currently support the upskilling and professional development of your employees? (Multiple answers are possible.)
- Regarding upskilling and professional development of your employees, what are the investment plans of your accommodation business over the next 6 months? (Answers are “...invest less than during the last 6 months”, “...invest about the same”, “...invest more than during the last 6 months”, “we are not investing in upskilling and have no plans to do so”, and “don’t know”.)
- What is holding you back from investing (even) more in staff training and upskilling? (Multiple answers are possible; answers are on a scale of 1 to 5, from “a major barrier” to “not a barrier at all”.)
- Which of the following aspects (e.g. costs, integration complexity, etc.) do you consider as challenges in implementing digital technologies, including AI, in your accommodation? (Multiple answers are possible.)
- To what extent do you think AI can help in the following areas? (Multiple answers are possible; answers are on a scale of 1 to 5, from “not helpful at all” to “very helpful”.)
- Country-specific questions are included in the respective country Barometers.

Methodology

The survey was conducted by Statista between February 24 and April 22, 2025, via telephone interviews. 1,160 executives and managers from the European travel accommodation sector participated in the survey. 80 respondents were interviewed from each country and region which included Austria, Croatia, France, Germany, Greece, Ireland, Italy, the Netherlands, the Nordics (Sweden, Denmark, Norway, and Finland), Poland, Portugal, and Spain, as well as 200 from the rest of Europe (Romania, Belgium, Czechia, Hungary, Bulgaria, Slovenia, Slovakia).

The 2024 data is based on the 2024 European Accommodation Barometer, held February 6 and March 22, 2024, with a sample size of 920 respondents.

The 2023 data is based on the Summer 2023 European Accommodation Barometer, held between March 28 and May 15, 2023, with a sample size of 920 respondents.

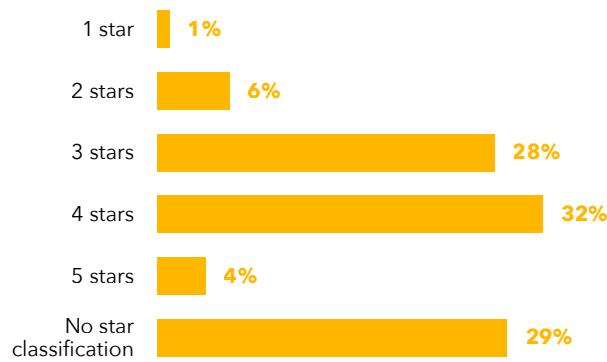
The 2022 data is based on the 2022 European Accommodation Barometer, held between August 15 and October 21, 2022, with a sample size of 1,000 respondents.



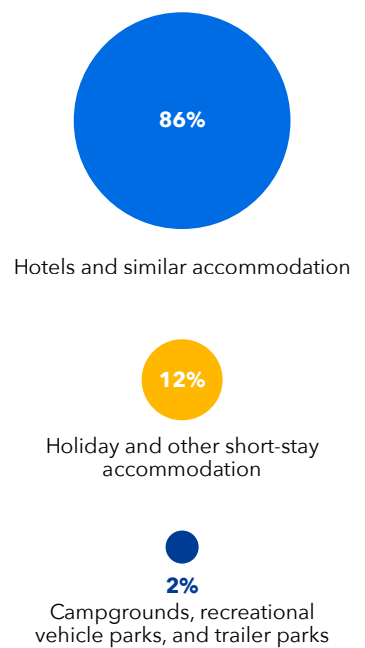
Business type



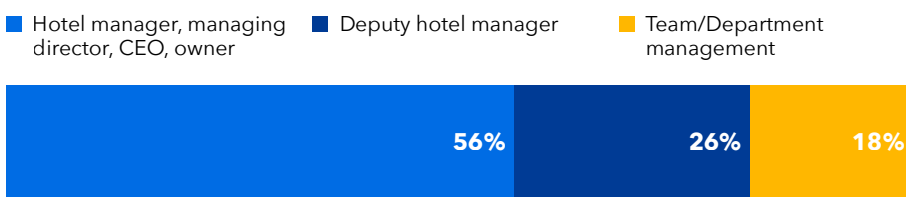
Star classification



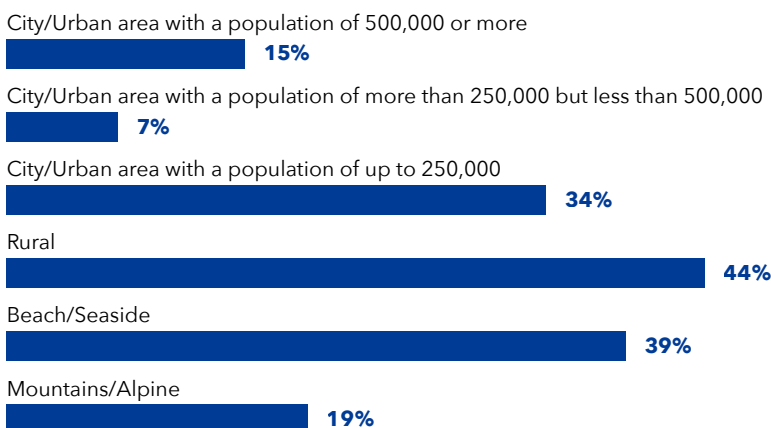
Accommodation type



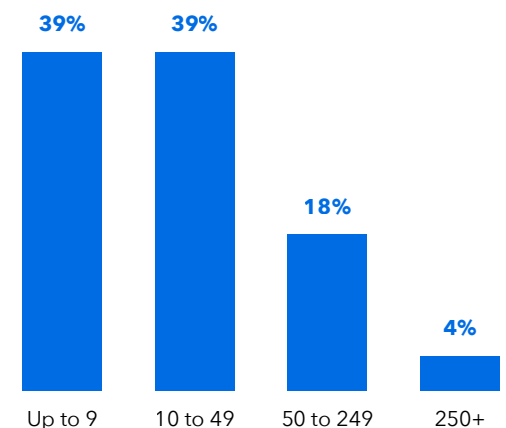
Position



Accommodation location (multiple answers are possible)



Number of employees



Booking.com

statista 