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European Accommodation Barometer 2026

Seceda peaks in the Dolomites, Italy

statista

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Budapest, Hungary

Executive Summary

Europe's accommodation sector advances on a foundation of steady demand and rising expectations

The 2026 European Accommodation Barometer shows a confident, forward-looking industry. Despite geopolitical frictions and economic uncertainty, Europe's hospitality sector is holding firm, supported by steady fundamentals such as occupancy trends, access to capital, and widespread optimism. Two-thirds of hoteliers[1] (66%) expect improvement in the coming season, marking a new high that builds on the already strong readings of recent years and far exceeds the low point of 2022, when just 38% felt similarly positive.

Confidence builds, as occupancy gains lead the way

While sentiment remains broadly positive across Europe, a clearer split emerges when looking at the results of individual countries. Spain, the Nordics, and Greece stand out as current leaders, maintaining strong business development over the past six months. At the other end, Germany and France continue to lag behind the European average, reinforcing a persistent gap in confidence among two of Europe's largest economies.

In terms of momentum, Spain, Ireland, Poland, and Austria stand out as the strongest improvers, each recording clear year-on-year gains across key measures. By contrast, Italy and Portugal show signs of softening, with declines across several indicators pointing to some market-specific headwinds.

Access to capital improves and investment intentions hold steady

This year, accommodations reported slightly easier access to capital than in 2025, with 44% of respondents having no difficulty (at all), compared to about one in five (21%) who did experience challenges. Investment appetite remains consistent: 67% of respondents plan to maintain existing capital spending, while slightly more plan to increase (17%) than reduce (13%) their outlays in 2026. This steady investment stance suggests that confidence in future demand remains intact, even as operators continue to manage costs carefully.

66% of European hoteliers expect their business to develop positively in the next six months

Granada, Spain

[1] The terms "accommodation provider" and "hotelier" are used interchangeably to refer to all respondents, which include operators of alternative accommodations such as short term rentals, camping/caravan sites, etc.

Chains and larger properties retain a structural advantage

Chain hotels outperform independent and alternative accommodations across sentiment measures, which is a pattern that is also reflected in larger properties versus smaller ones. In the accommodation industry, scale offers distinct advantages, particularly for operators with multiple properties or a presence across several markets, enabling easier access to financing, more proactive investment strategies, and faster, more uniformed adoption of digital tools. Independent and alternative accommodations continue to face greater headwinds and this divide remains one of the most consistent findings across Barometer surveys.

Cybersecurity confidence is high, but gaps remain

Two-thirds of European accommodations (66%) feel that their cybersecurity preparedness is sufficient or fully sufficient, supported by widespread adoption of core protections: 86% run regular software updates, 85% use network security tools such as firewalls, and 80% have secure payment processing in place. Yet the familiar size divide persists here too. Nearly all respondents with 250 or more employees (94%) rated their preparedness as (fully) sufficient, compared to just six in ten of those with fewer than ten staff. Only 7% of accommodations self-reported a cybersecurity incident in the past year, though this figure rose to nearly three in ten (28%) among the largest operators, reflecting not only greater exposure, but also a higher likelihood of detecting and formally recognising incidents.

Accommodations adopt a diverse mix of strategies to stabilise seasonal demand

Discounting stands out as the most widely used and effective strategy, with 87% of accommodations applying it to boost off-season demand, though a range of other methods are also in practice. Accommodations also engage in partnerships with digital platforms, local attractions, and tourism boards to attract off-season guests (48%). Effective channel management through a mix of online travel platforms, social media, and paid search advertising extends reach and ensures that offers reach the right audience.

Half of European hotels benefit from event-driven tourism

Half of European accommodations (50%) reported benefiting from event-driven travel in the past 12 months, with 14% describing the impact as significant. Among those benefiting, two-thirds (66%) cited improved revenue per room and six in ten (60%) saw increased bookings during a typically low-demand period, helping to offset revenue shortfalls in slower seasons. Operationally, seven in ten (71%) raise prices to reflect higher demand and operating costs when events take place, while 66% adjust staffing schedules and pay overtime to maintain service quality. Half of European accommodations also report shifting room inventory towards direct sales channels in response to events, indicating a more active approach to managing demand. Looking ahead, half of hoteliers want to coordinate with local authorities and tourism boards on event-related demand, signaling a growing appetite for public-private collaboration.

European accommodations are deeply embedded in their local economies

A strong emphasis on nearby sourcing is most evident in countries such as Italy, Germany, and Austria, where more than 40% of operators allocate at least three-quarters of their non-labour budgets to suppliers within their immediate area. Beyond procurement, 43% of accommodations also open facilities such as restaurants or wellness areas to local residents, further strengthening their integration into communities. Together, these patterns underline the industry's dual role as both an economic driver and a contributor to local social infrastructure.

The European Accommodation Barometer

The sixth edition of the European Accommodation Barometer is based on a survey of 1,240 executives and managers across the European accommodation sector. It is jointly produced by Booking.com and Statista.

Economic Sentiment

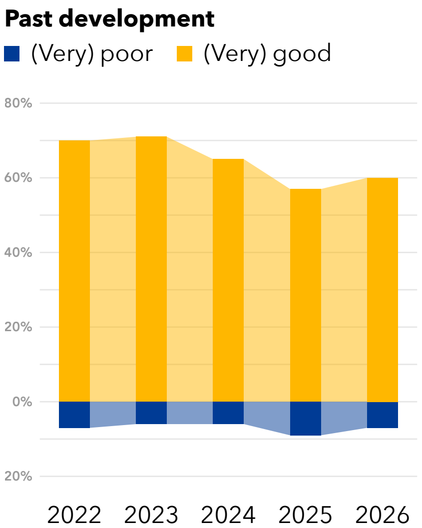
Optimism continues to increase, past and present development remains steady

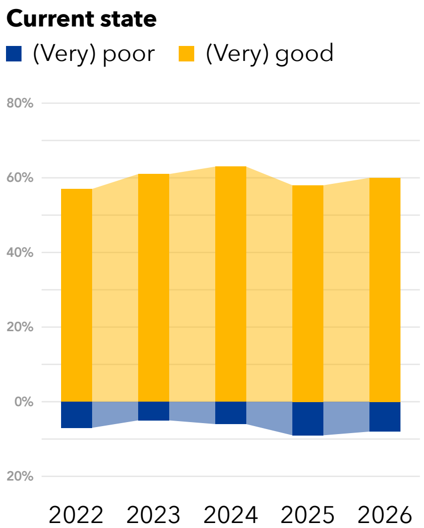
Despite economic uncertainty, trade tensions, ongoing war in Ukraine, and the recent escalation in the Middle East[2], the majority of European accommodations report positive assessment of their past, present, and future business developments.

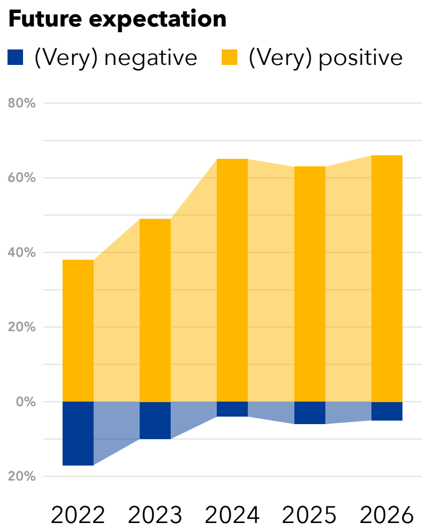
The 2026 Barometer findings mark a small uptick in positive views of past performance and steady results for both current sentiment and future expectations. This picture is further reinforced by the low share of negative responses, with fewer than 10% of accommodations reporting a negative view across these measures.

Frankfurt, Germany

Accommodations' perception of their economic development







Across Europe, sentiment remains broadly positive; nevertheless, some countries consistently show higher-than-average positive sentiment, others have recorded significant improvements in 2026, while some are noticeably lagging behind.

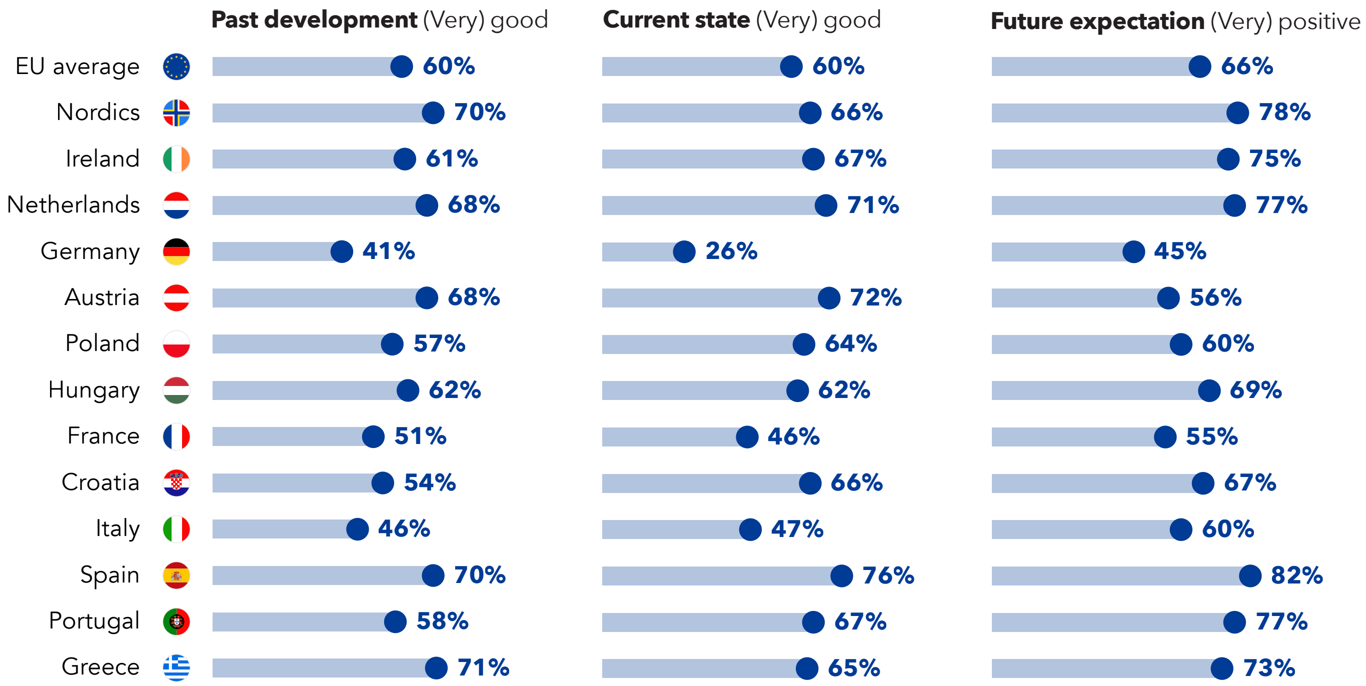
The Nordics, Greece, and Spain remain long-term leaders, once again demonstrating strong business development over the past six months and across key indicators. Germany and France, by contrast, have consistently recorded below-average results. This suggests that their weaker sentiment is a more persistent pattern rather than a recent shift in market conditions.

In terms of momentum, Spain, Ireland, Poland, and Austria show the strongest improvement, each posting some of the largest year-over-year gains compared with 2025 results. This is led by Spain, which has recovered from a considerable drop in sentiment in the previous year. These improvements align with broader positive signals, including rising occupancy rates, with half of the total EU respondents reporting an increase over the past six months.

Conversely, Italy and Portugal show notable declines across several key measures, suggesting market-specific head-winds within an otherwise resilient European environment.

[2] Fieldwork for this survey was conducted between February 5 and March 24, 2026. Results therefore reflect sentiment at that point in time and may not fully account for more recent geopolitical developments and resulting energy supply disruptions.

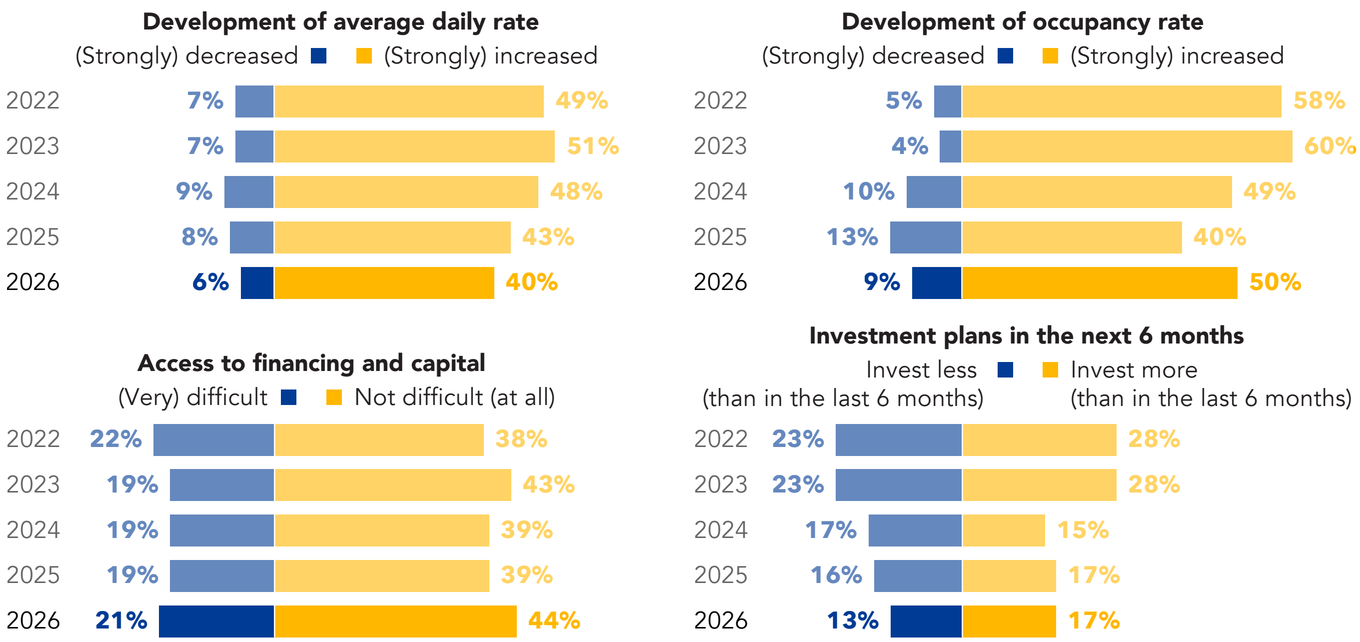
Accommodations' perception of business development, by country



While growth in room rates continue to moderate, occupancy levels are recovering. In 2026, 40% of accommodations reported increases in room rates, extending a downward trend from recent highs. In contrast, half of respondents saw higher occupancy following last year's slowdown. Taken together, this points to a shift in market dynamics, where demand is strengthening, but operators face more limited scope to push prices, placing greater emphasis on volume and occupancy to sustain performance.

When looking at access to capital, there was a five percentage point increase in the share of accommodations that have no difficulty (at all) accessing capital but the share of accommodations having difficulty remains steady, affecting around one in five accommodations. Investment intention also remains similar to the last two years with only slightly more accommodations intending to invest more in 2026 (17%) than those who intend to invest less (13%).

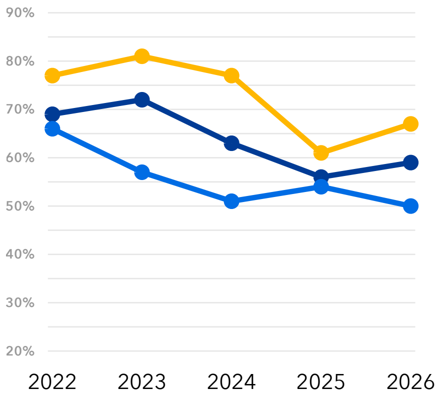
Development of accommodation business in the last 6 months



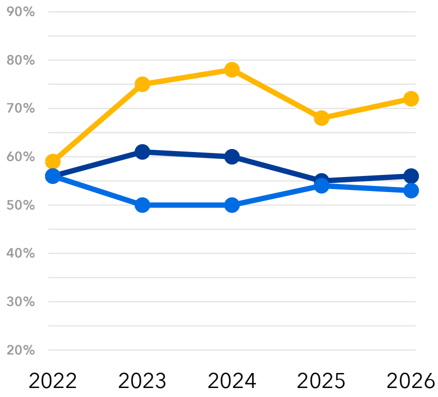
Europe-wide perception of business development, by accommodation type

■ Chain hotels ■ Independent hotels ■ Alternative accommodations

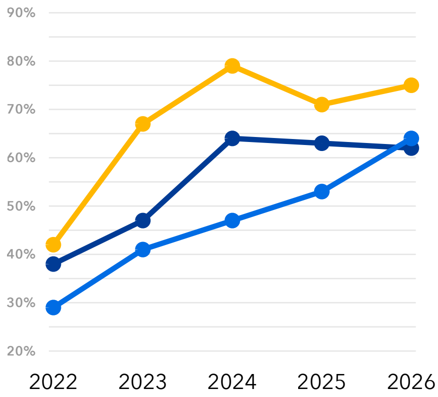
General development in the past 6 months
(Very) good



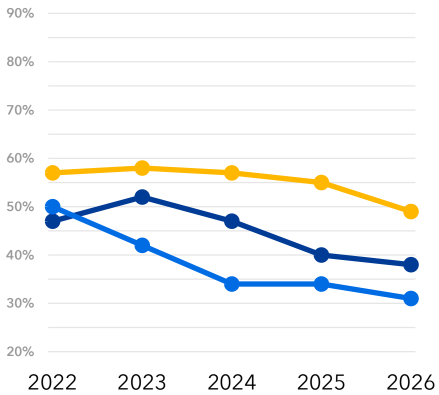
Current economic situation
(Very) good



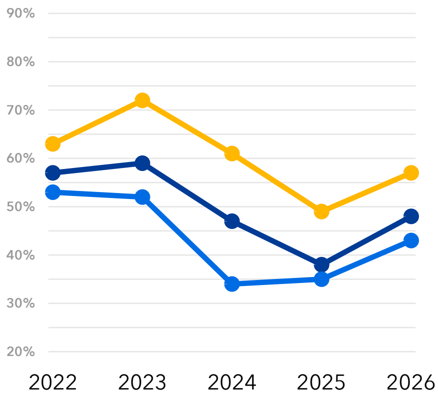
Economic situation in the next 6 months
(Very) positive



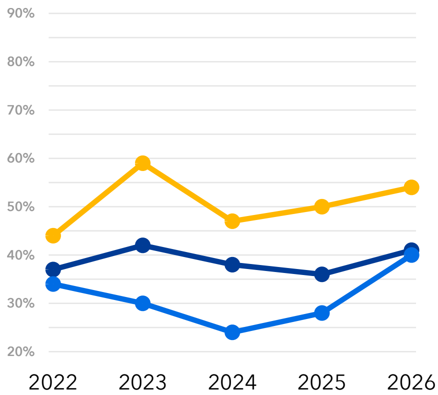
Development of average daily rate
(Strongly) increased



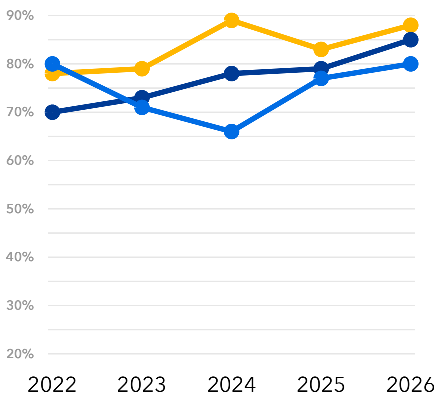
Development of occupancy rate
(Strongly) increased



Access to financing and capital
Not difficult (at all)



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



Europe-wide, chain hotels consistently report more favourable business sentiment across all metrics, including economic conditions, key performance indicators, room rate, and occupancy developments. Independent hotels and alternative accommodations track more conservatively by comparison.

Chains are typically better positioned to absorb economic pressures and leverage scale, whether through investment capacity, pace of technology adoption, or more favourable access to financing.

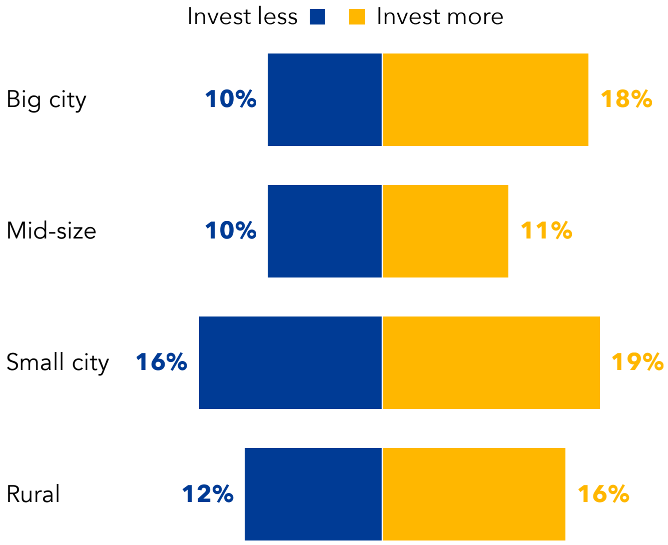
Despite these gaps, the overall perception of the business environment remains broadly aligned across accommodation types, suggesting that operators respond to the same underlying market conditions. This is particularly evident in the assessment of occupancy and pricing trends. In 2026, a growing share of accommodations across all segments reported increases in occupancy, while fewer indicated rising daily rates.

Rural locations and large cities most likely to report positive economic results

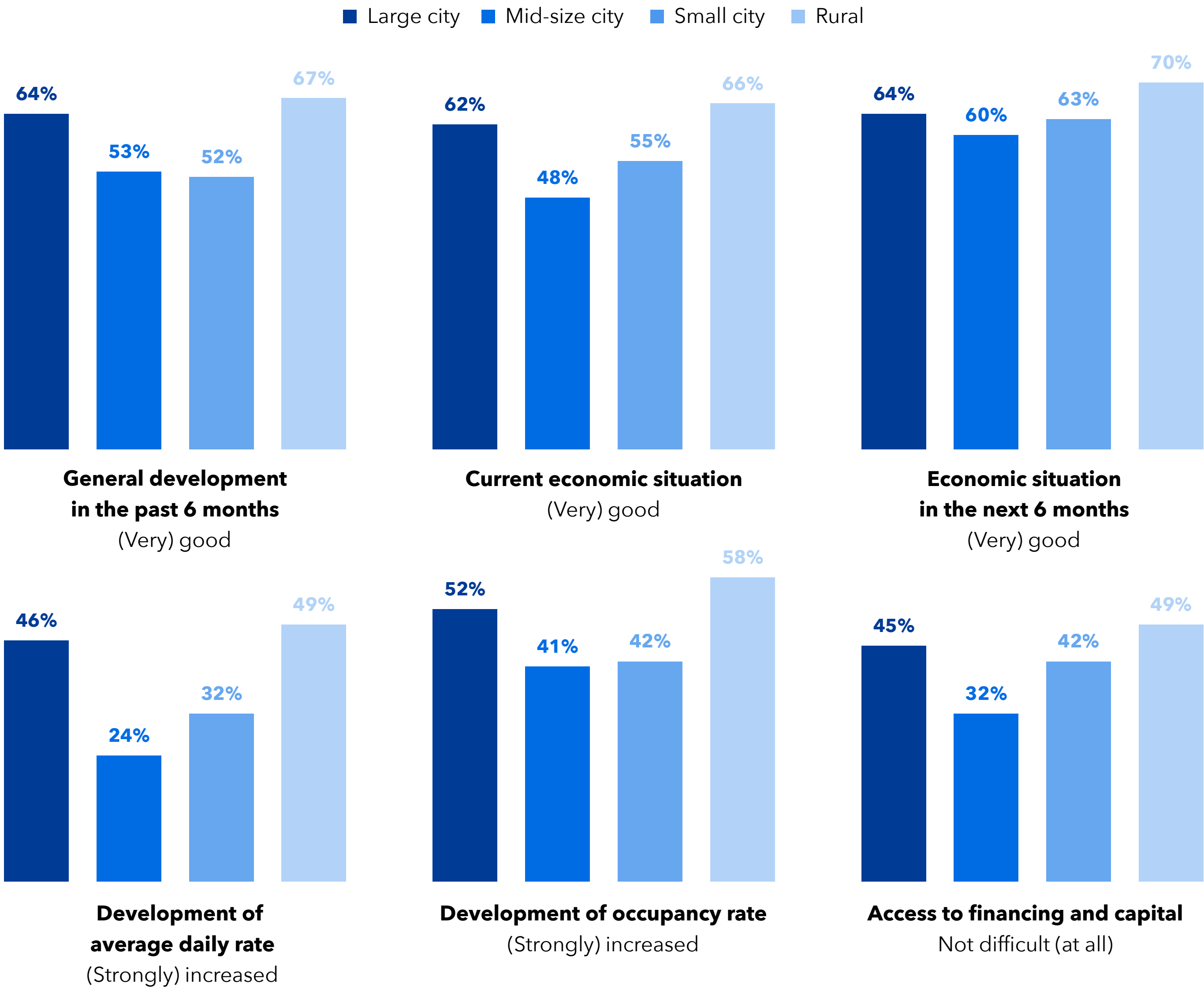
The data reveals a pronounced U-shaped pattern in sentiment across the urban–rural continuum. Large cities and rural destinations consistently outperform mid-sized and smaller cities on all measures, from past performance to future expectations.

The vastly different operating environments of large cities and rural jurisdictions means that profit margins, operational costs, and occupancy expectations are likely to differ greatly between accommodations at these locations. Large cities benefit from scale and pricing power, while rural areas may face a lighter cost base. Mid-sized and smaller cities appear more squeezed, lacking both the scale and flexibility of major hubs and the relative cost advantages of rural destinations.

Investment plans in the next 6 months, by location



Accommodations' business development, by location



Note: Large city (500,000+ inhabitants); mid-size city (250,000 to 499,999 inhabitants); small city (less than 250,000 inhabitants)

Digital Resilience

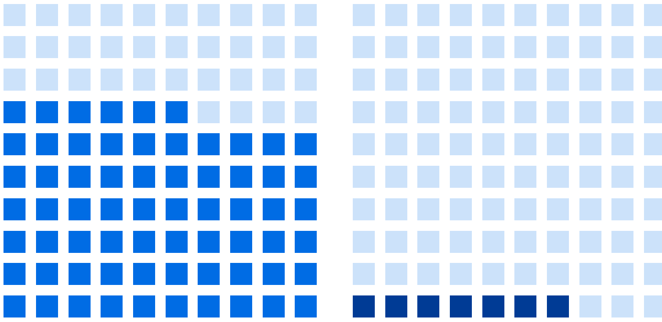
Contextualising cyber risks within the broader operational environment

Two-thirds (66%) of European accommodations rate their level of cybersecurity preparedness as (fully) sufficient given the digital risks they face. On average, 7% self-reported that they had experienced a cyber or data security incident in the past year, ranging from 14% in France to 0% in Italy. This may partly reflect differences in interpretation, as incidents can range from major data breaches to minor service disruptions.

While these results are encouraging, AI automation is rapidly amplifying both the volume and sophistication of cyber threats. A 2026 Global Threat Report by CrowdStrike found that 82% of cybersecurity threat detections in 2025 were malware-free[3], meaning attackers are increasingly using legitimate credentials and trusted systems to evade traditional security tools.

Furthermore, a 2026 report by the World Economic Forum states that 87% of organisations believe that AI-related vulnerabilities were the fastest-growing cyber risk and more than three-quarters saw an increase in cyber-enabled fraud and phishing.[4] The reality is that AI is enabling criminals to personalise attacks at scale, dramatically increasing their effectiveness and lowering the barrier to entry for new offenders. To protect themselves and their customers, accommodations are constantly under pressure to update and upgrade their cybersecurity defences, but not all can keep the same pace.

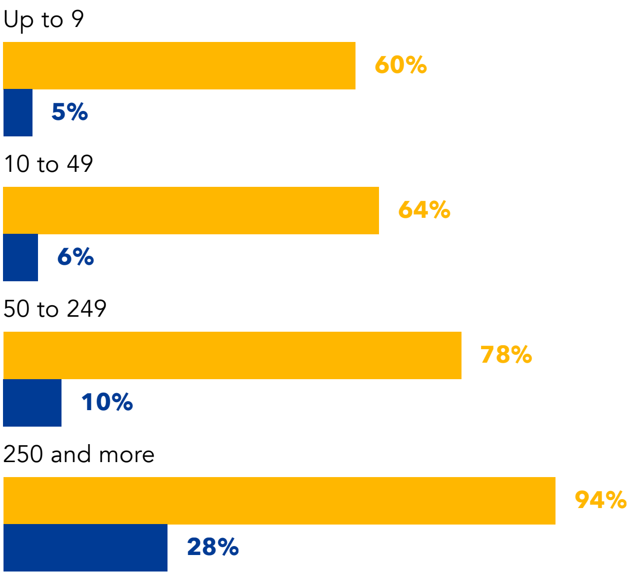
66% of European accommodations feel that their cybersecurity preparedness is (fully) sufficient



7% self-reported that they have been affected by a cybersecurity incident in the last 12 months

Cybersecurity preparedness and incident reporting, by number of employees

- Cybersecurity preparedness (fully) sufficient
- Experienced a data or cybersecurity incident in the past 12 months



Cybersecurity confidence starkly correlates to accommodation size and complexity, operators with more employees and more beds are more likely to be satisfied with their IT security protocols. Just six in ten accommodations with up to nine employees felt their cybersecurity protection was sufficient compared to nearly all (94%) respondents with 250 or more employees. This pattern reflects a mix of factors: larger organisations tend to have more advanced cybersecurity measures in place and are therefore better positioned to detect and record incidents, while also presenting a more visible and attractive target for potential attacks.

94% of accommodations with 250 or more employees say their cybersecurity protections are sufficient, while just **60% of small accommodations with less than ten employees** feel the same

[3] CrowdStrike, 2026 Global Threat Report
[4] World Economic Forum, 2026 Global Cybersecurity Outlook

The cyber-readiness size gap

The ability to detect, report, and respond to attacks is just as important as the presence of cyber-attack prevention software and protocols, and this is where European accommodations demonstrate a solid baseline of digital risk management. Our survey finds that there is widespread use of regular software updates (86%) and deployment of network security tools such as firewalls (85%).

With core cybersecurity systems widely in place, measures requiring ongoing maintenance and staff involvement are less common. Only six in ten accommodations are using multi-factor authentication, conducting training, or carrying out periodic IT audits. This deficit in human resource investment was also evident in our 2025 hospitality skills survey, which found that just 16% of European accommodations felt that digital literacy was a current training priority; however, 82% believed that it is a critical skill for the future.[5]

Just as size matters for business performance, a similar pattern emerges in cybersecurity readiness. Chains and larger operators are far more likely to feel confident in their level of preparedness than independent and smaller businesses (79% chains vs. 61% independent; 83% accommodations with 250+ beds vs. 63% accommodations with less than 250 beds).

This divide is also reflected in the measures being implemented. Smaller operators with fewer employees generally keep pace with core protections such as software updates, network security, secure payment processing, and data encryption. However, they are less likely to adopt additional or ongoing practices, including staff training, multi-factor authentication, engagement with third-party providers, and periodic IT security audits. In fact, for any given cybersecurity measure, at least three-quarters of accommodations with 50 or more employees said they implemented it. For operators with fewer than 50 employees, measures like multi-factor authentication and periodic IT audits were only performed by around half (47%–62%).

Cybersecurity measures currently in use, by number of employees

[5] Statista & Booking com, Upskilling European Hospitality, 2026

Traveller access among the leading concerns for accommodations in 2026

In 2026, European hoteliers are most worried about disruptions that affect access and facility maintenance. When asked to name their top three challenges, the leading answers are extreme weather affecting travel (37%) and local access disruptions such as transport strikes and construction (32%).

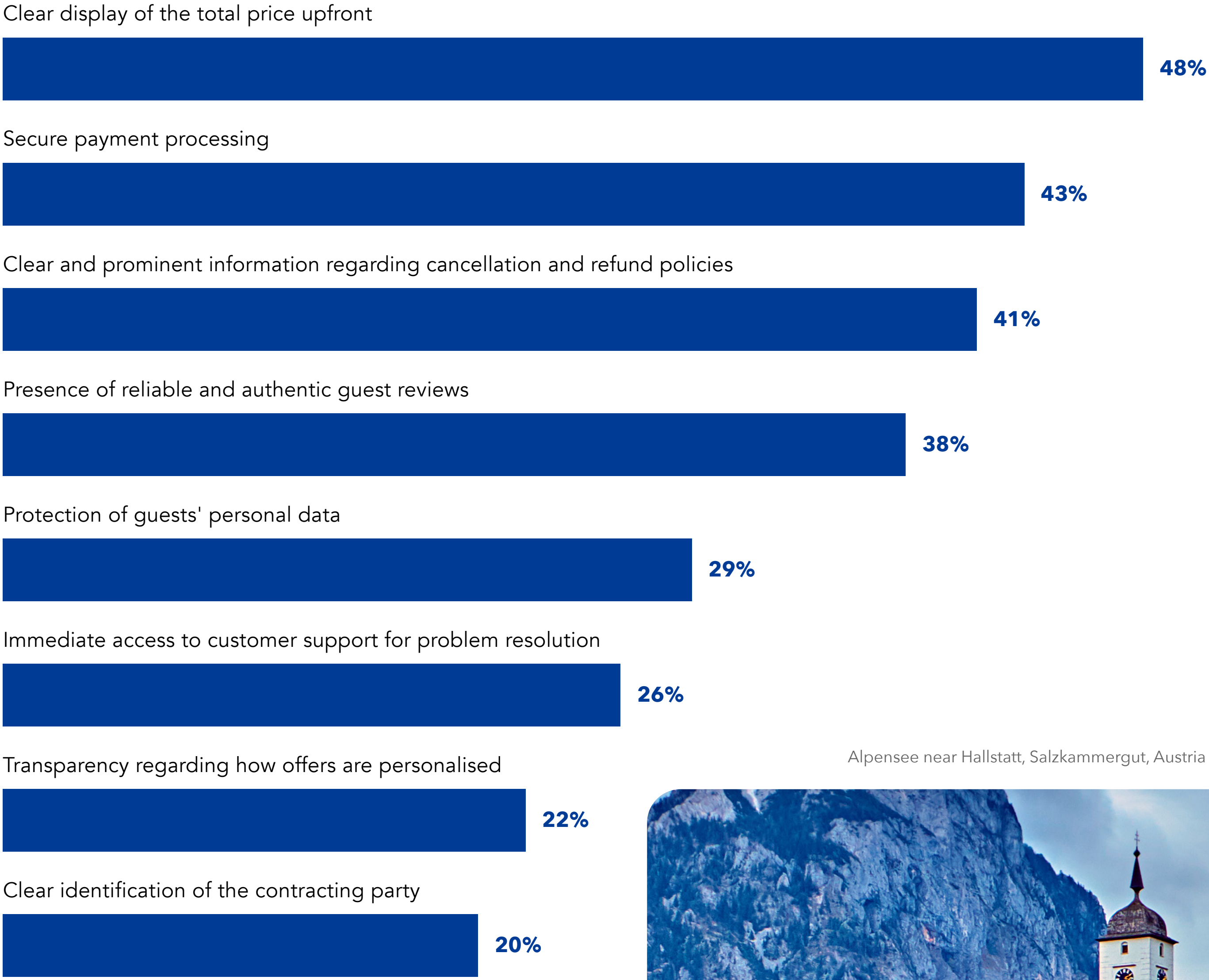
Three concerns tied for third place, two of which are related to digital issues: IT outages and payment fraud, along with physical property damage. Meanwhile, 16% do not foresee any major disruptions to their business in the next 12 months.

At the time of fieldwork, geopolitical tensions were escalating in late February. Around half of respondents were interviewed before this point, with the remainder surveyed afterwards. This timing may have influenced how respondents assessed potential risks. Notably, a large share of Italian respondents selected "other" when identifying key concerns, with many citing staffing challenges and broader geopolitical or economic uncertainty.

Top concerns for European accommodations in the next 12 months (%)	**EU average**	Nordics	Ireland	Netherlands	Germany	Austria	Poland	Hungary	France	Croatia	Italy	Spain	Portugal	Greece
Travel disruptions caused by extreme weather or natural events	37	34	43	33	34	36	41	46	51	42	22	38	35	32
Local disruptions affecting guest access or operations	32	30	29	33	29	24	46	38	41	27	14	33	31	50
IT outages or failures of digital systems	26	22	36	22	34	30	38	29	24	24	6	34	21	21
Payment fraud or chargebacks	26	23	23	32	19	15	30	33	20	34	9	24	32	16
Property damage or operational incidents involving guests or third parties	26	25	31	24	12	18	30	27	15	27	14	33	27	34
Disruptions or failures involving key suppliers or service providers	24	17	21	24	21	12	23	33	21	24	6	44	32	21
Cybersecurity or data security incidents	23	24	25	28	32	30	31	20	16	22	2	26	23	21
Do not foresee any major concerns	16	21	21	16	18	19	10	16	17	15	18	15	20	4
Other	11	15	6	6	13	17	4	2	13	5	61*	2	0	18

*A large share of Italian respondents chose to give an open answer to this question. Many of these responses related to staffing and the geopolitical/economic climate. See methodology for survey timing and potential impact of geopolitical developments on responses.

Most critical factors for building consumer trust for online bookings



On the topic of fostering consumers' digital trust, hoteliers were asked to choose the three most critical factors for customers when they book online. The leading answer, chosen by 48% of hoteliers, was the clear display of the total price, followed closely by secure payment processing (43%). Another factor relating to transparency rounded out the top three, with 41% choosing clear and prominent information regarding cancellation and refund policies.

Fewer hoteliers believed compliance activities such as protecting guest data (29%) and operational information such as how offers are personalised (22%) or the identification of contracting parties (20%) were as important to fostering trust online. Nevertheless, while fewer hoteliers feel that these factors are not necessarily important for consumer trust, three-quarters implement data encryption for sensitive guest and business information.

Alpensee near Hallstatt, Salzkammergut, Austria

Seasonality in Travel

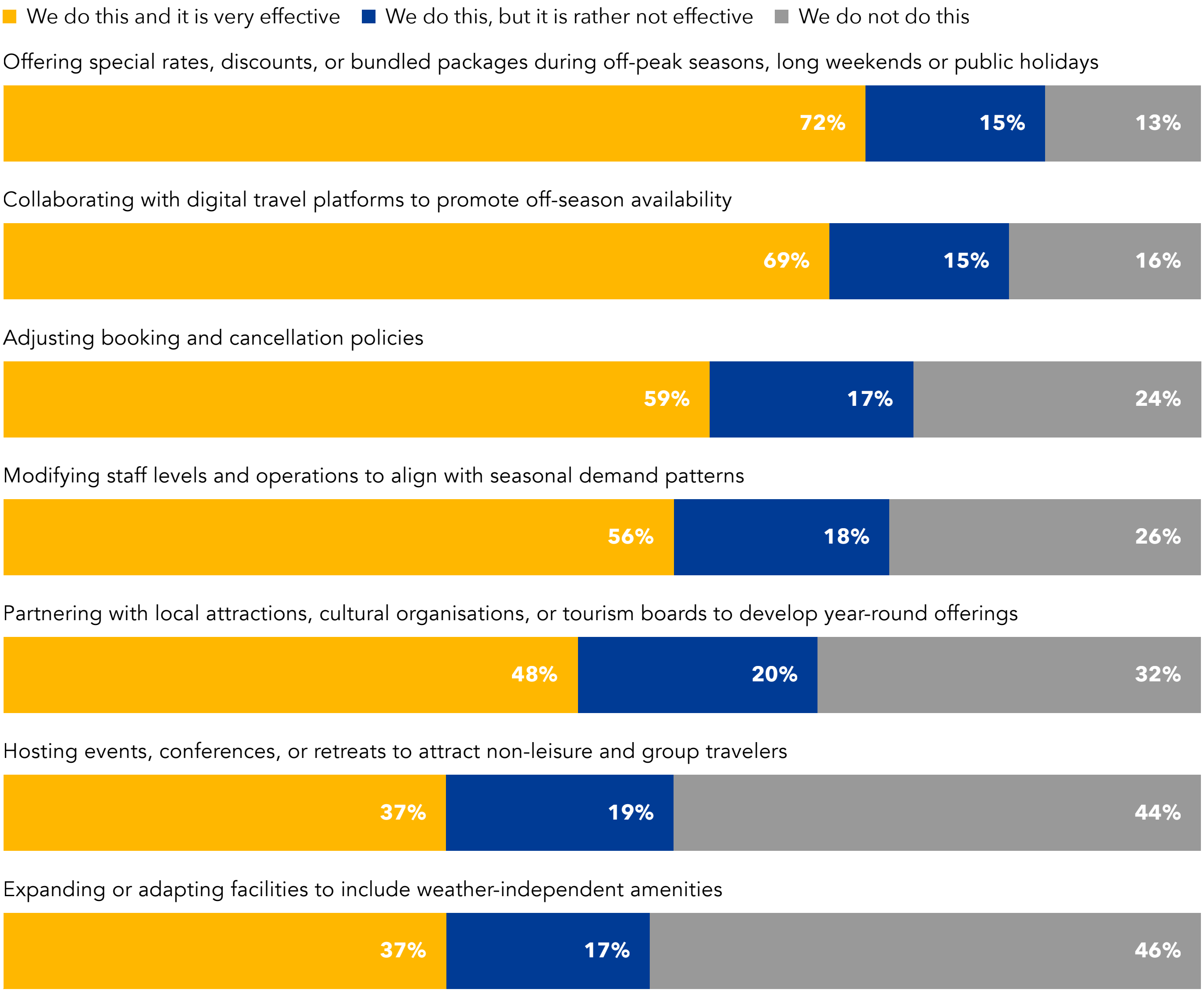
Attracting customers in the off-season is never a one-size-fits-all solution

To support demand throughout the year, European hoteliers deploy a mix of defensive and proactive strategies. Among these, discounting stands out as the primary lever, with 87% of respondents offering special rates in the off-season and a strong majority reporting positive results.

Alongside pricing tactics, operators operators have other options in their toolkit, such as collaborating with digital platforms (84%), adjusting booking policies (76%), or hosting events to target new demand (56%). While the effectiveness of individual measures varies, accommodations typically combine these approaches in response to seasonal fluctuations. The relative success of each strategy also depends on local market conditions.

For example, although travel disruptions due to extreme weather was revealed as the most common concern for accommodations in the next 12 months, expanding or adapting weather-independent facilities was the least common strategy used to mitigate the effects of seasonality. However, this practice rises significantly in markets such as Spain (75%) and Portugal (77%), reflecting their reliance on favourble weather conditions. Similarly, accommodations in Poland (92%) and Ireland (93%) are more likely to collaborate with digital travel platforms, while Spain, the Nordics, and Ireland also stand out for their willingness to partner with local attractions to address seasonality.

Strategies used to mitigate the effects of seasonality



Strategies used to mitigate the effects of seasonality (%)	EU average	Nordics	Ireland	Netherlands	Germany	Austria	Poland	Hungary	France	Croatia	Italy	Spain	Portugal	Greece
Offering special rates, discounts, or bundled packages during off-peak seasons, long weekends or public holidays	87	94	86	90	66	63	96	95	88	94	84	89	92	84
Collaborating with digital travel platforms to promote off-season availability	84	82	93	88	73	80	92	86	82	81	73	87	87	84
Adjusting booking and cancellation policies	76	70	77	79	46	68	80	77	79	80	80	86	81	84
Modifying staff levels and operations to align with seasonal demand patterns	74	82	80	76	54	57	84	73	55	84	72	82	87	73
Partnering with local attractions, cultural organisations, or tourism boards to develop year-round offerings	68	77	75	64	47	57	69	68	69	68	71	78	73	57
Hosting events, conferences, or retreats to attract non-leisure and group travelers	56	64	62	59	31	39	68	50	40	56	36	73	72	58
Expanding or adapting facilities to include weather-independent amenities	54	54	52	52	26	46	60	61	45	58	35	75	77	50


Cliffs of Moher, Ireland

The mix of strategies used by hoteliers reflects a broader principle of hotel revenue and channel management: creating off-season demand requires both an attractive offer and a practical route to market. Pricing can make a stay more appealing, but distribution partners and marketing channels are what help put that offer in front of the right audience.

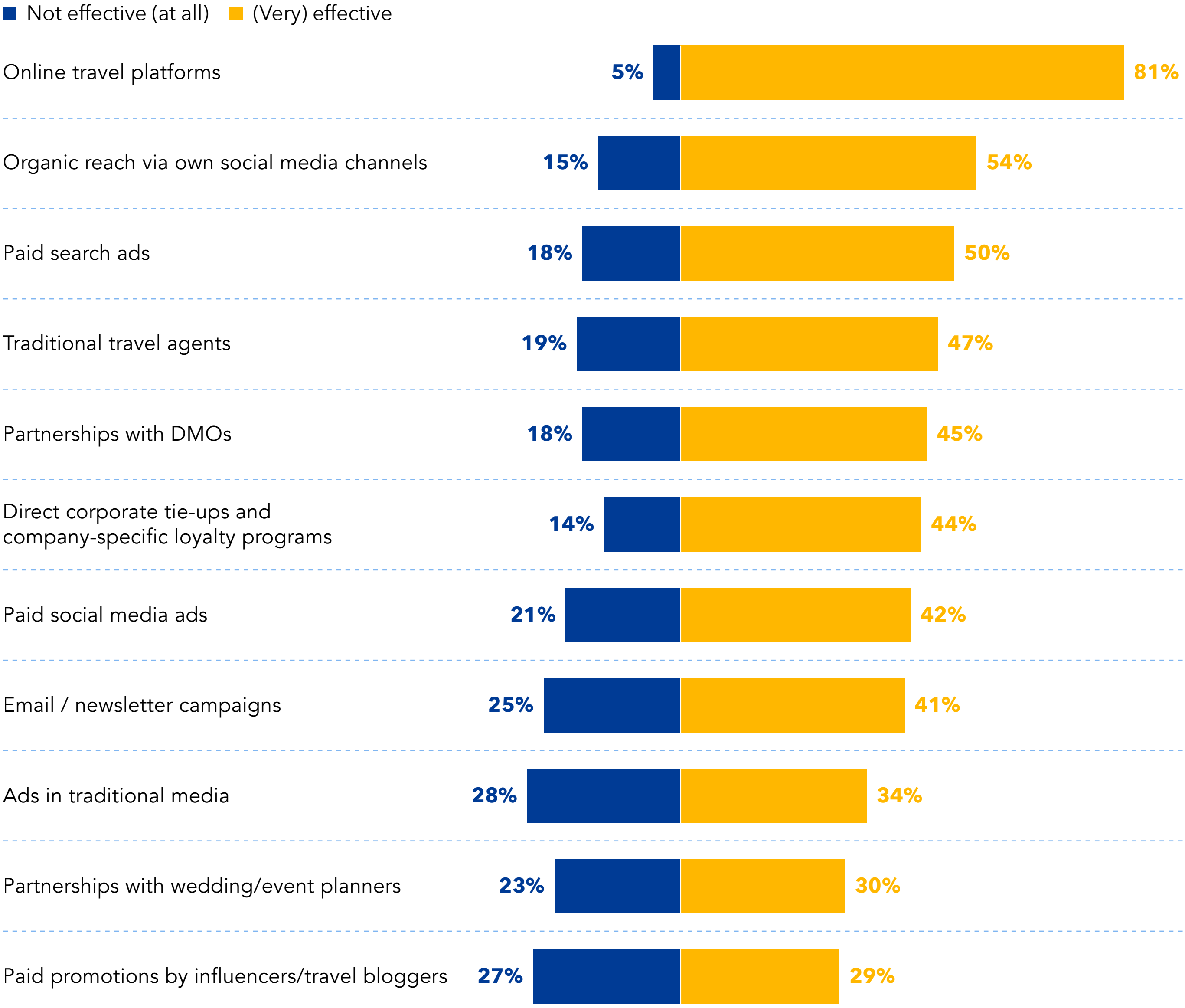
When it comes to strategies used to secure off-season stays, online travel platforms are widely seen as one of the most effective channels, cited by 81% of hoteliers. Other digital channels also play an important role, with over half highlighting organic reach through their own social media (54%) and half pointing to paid search advertising (50%). Even less prominent channels contribute to the overall mix, with nearly a third of accommodations finding value in influencer and travel blogger partnerships (29%), while traditional media continues to be used by 34%.

Online travel platforms are widely used to support demand, particularly during shoulder seasons, but they operate as part of a broader distribution mix. Travel agents and tour operators also play a part in facilitating accommodation bookings, however, direct bookings still represent the largest share of sales for European accommodations.

These channels work in tandem rather than in isolation. Hoteliers rely on a range of touchpoints to generate and convert demand at different stages of the customer journey. Visibility through platforms and intermediaries supports discovery and comparison, helping to build confidence among prospective guests. The relative importance of each channel varies by location, seasonality, and property type, underscoring the need for a flexible approach to distribution.

Gamla Stan, Stockholm, Sweden

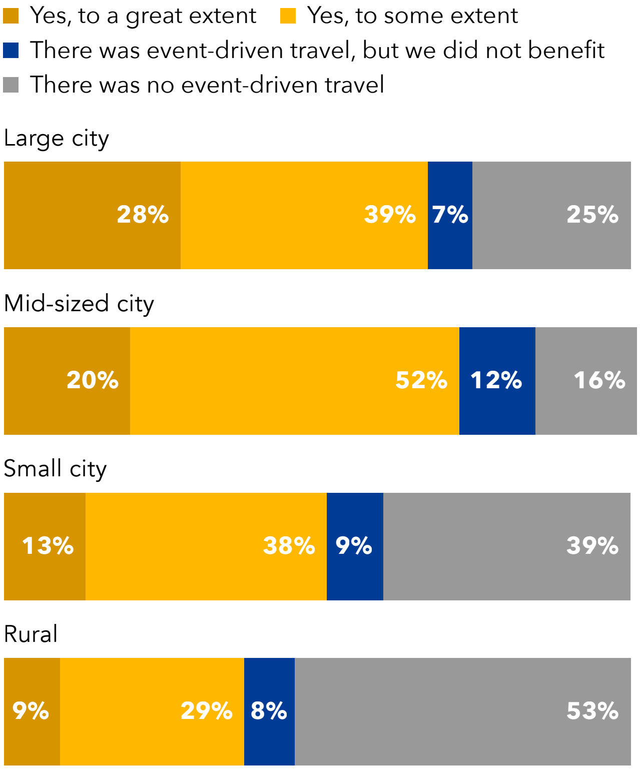
Effectiveness of measures to secure off-season stays



Event-Driven Tourism

Half of European accommodation businesses benefit from event tourism

Benefit from event-driven travel in the past 12 months, by location

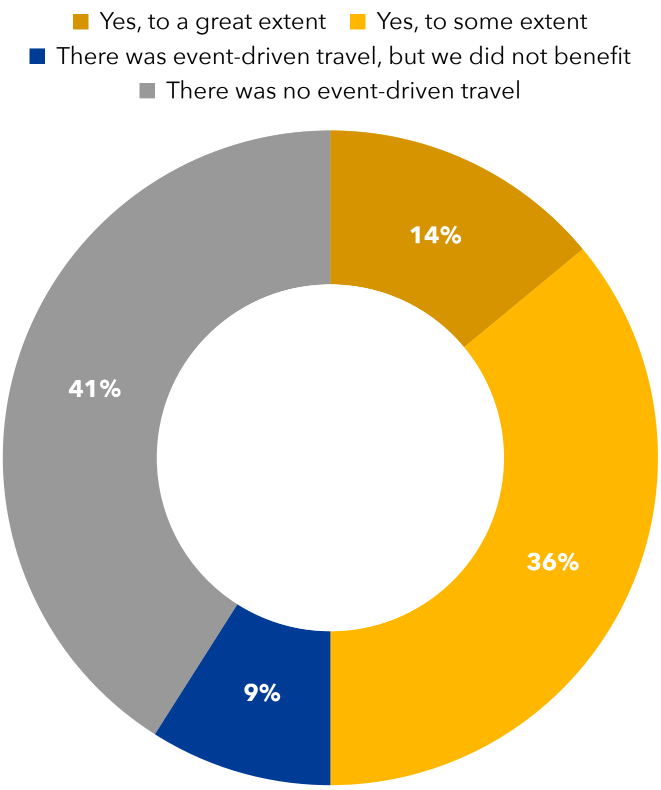


Six in ten European accommodation businesses reported event-driven tourism in their local area, and the majority of those were able to benefit from the resulting increase in demand. By contrast, 41% reported no event-driven travel over the past 12 months. Access to and benefits from event tourism vary significantly by location. Accommodations in large cities (500,000+ inhabitants) are far more likely to benefit, with 67% reporting positive impacts, compared to just 38% in rural areas, where over half (53%) reported no event-driven travel at all. This disparity may be driven by the greater density of venues, transport links, and event infrastructure in larger cities (such as stadiums and convention centers)

Among those benefiting from event-driven tourism, 66% cited improved revenue per room and 60% reported increased bookings during typically low-demand periods. Large-city accommodations were also more likely to report higher-value outcomes, including stronger pricing (80% vs. 63% in rural areas), more international guests (66% vs. 47%), and a greater ability to invest in staff, facilities, and service improvements (53% vs. 39%).

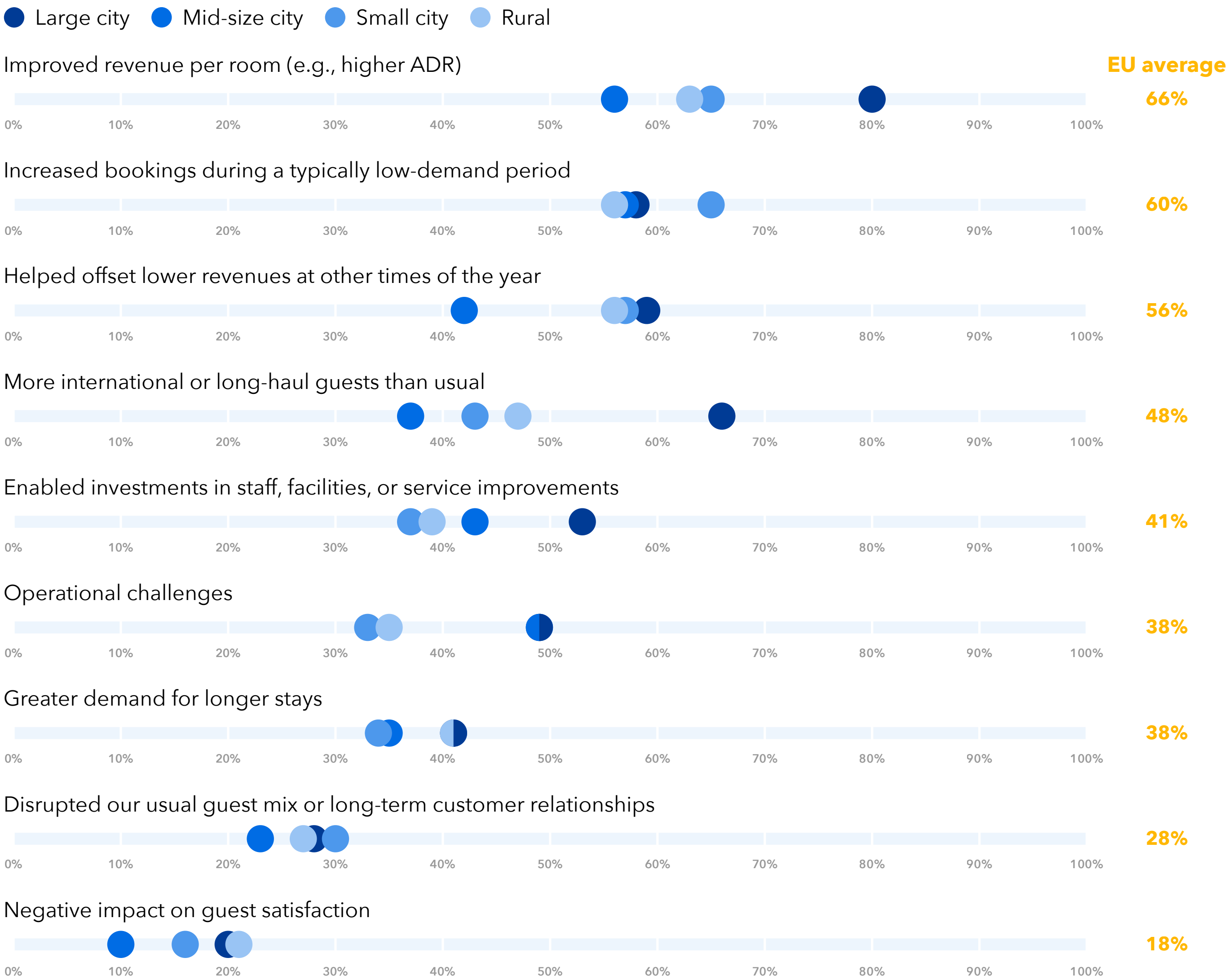
On most other impacts, the urban–rural divide is less pronounced. Similar shares of accommodations across locations reported that events help boost bookings in slower periods and offset weaker demand at other times of the year. This pattern also extends to less common downsides, such as disruptions to the usual guest mix or a negative impact on guest satisfaction. Overall, event-driven demand plays an important role in balancing seasonal fluctuations, helping many accommodations smooth revenue across the year.

Benefit from event-driven travel in the past 12 months



Holi festival, Barcelona

Impact of event-driven travel, by location



Looking ahead, half of hoteliers (50%) are interested in working with local authorities and tourism boards on event-related demand. By comparison, only three in ten would consider partnering with event organisers, pointing to a stronger preference for institutional collaboration.

While this pattern is broadly consistent across accommodation sizes, a clearer urban–rural divide emerges. Large-city accommodations are more likely to consider partnerships with event organisers (41%) than those in rural areas (28%), which may reflect both willingness and the greater availability of such partners in urban markets.

Outlook regarding event-driven tourism

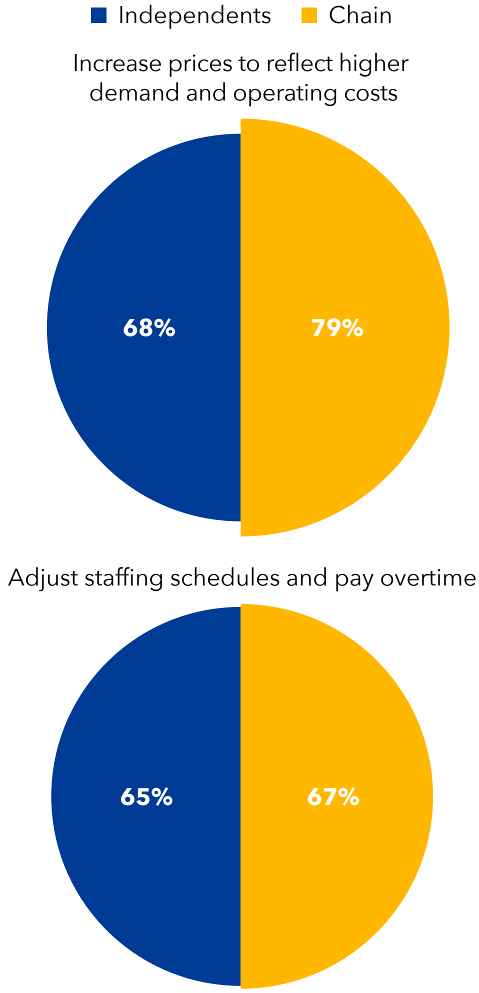
*Exclusive options

While most accommodations agree that event tourism is beneficial for business, hoteliers also recognise that it requires operational adjustments to meet higher demand and guest expectations. Most commonly, prices are increased to reflect higher demand and operating costs (71%), alongside adjustments to staffing levels and overtime (66%) to maintain service quality. Shifting inventory from various distribution channels to the direct sales channel is practiced by 50% of accommodations.

Taking a closer look at the two most common operational adjustments, increasing prices to reflect higher demand and operating costs is more common among chains, large accommodations (both in bed number and employee number), and in large cities. Rural, independents, and small hotels were less likely to adjust prices when an event takes place, although more than 60% of accommodations across all accommodation types still do so.

In turn, the cohort of accommodations that are more likely to raise their prices when an event takes place, are also more likely to adjust staffing and pay overtime during these periods, highlighting the trade-off that accommodations often make between making changes that increase operational costs and passing these costs on to the customer. Only rural accommodations adjust staffing and pay overtime more commonly than increasing prices.

Operational adjustments made when event takes place, by accommodation type



Operational adjustments made when event takes place

Local Impact

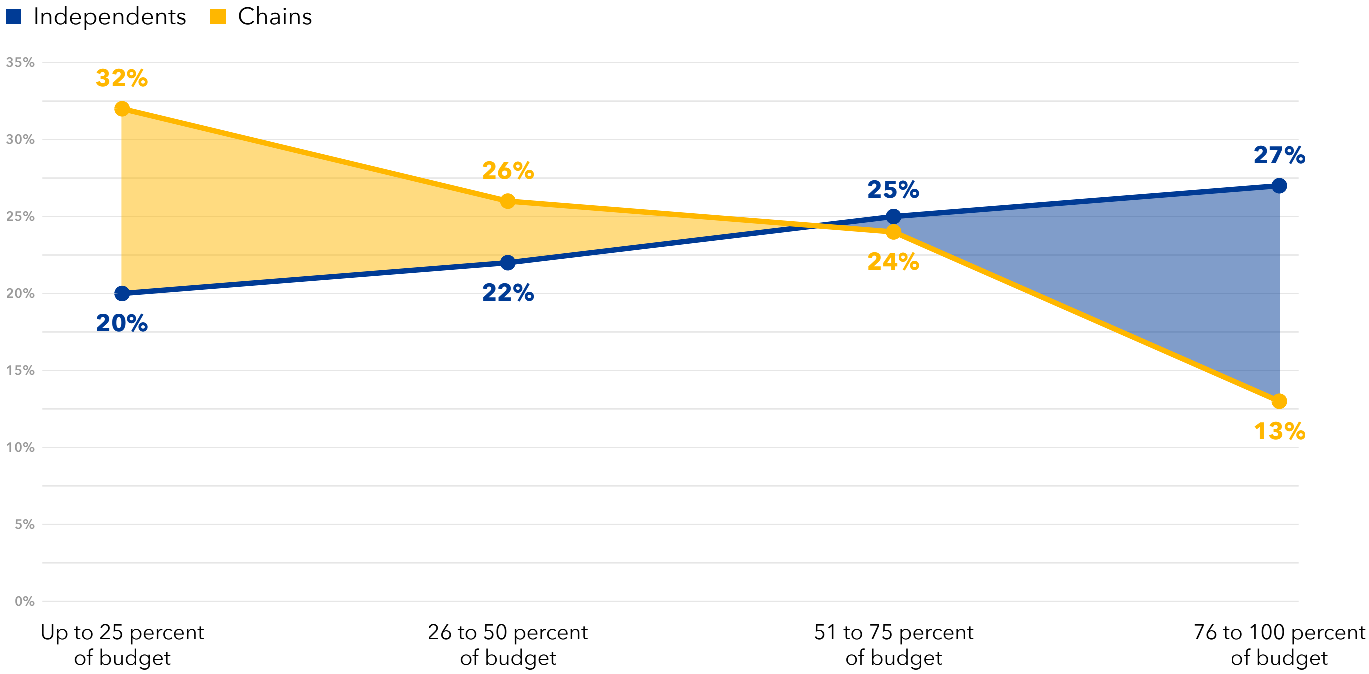
Accommodation businesses are deeply integrated into their communities

Hotel spending within the communities where accommodations operate can vary significantly, depending not only on the availability of local goods and services but also on guest expectations and preferences. This is reflected in the range of responses across Europe. Italy, Germany, and Austria stand out as particularly locally focused, with more than 40% of accommodations allotting at least 75% of their non-labour budgets to nearby suppliers.

Share of non-labour operating budget spent on local vendors and suppliers, by country

	Up to 25 percent of budget	26 to 50 percent of budget	51 to 75 percent of budget	76 to 100 percent of budget
EU average	23%	23%	25%	23%
Nordics	26%	23%	20%	27%
Ireland	27%	25%	16%	25%
Netherlands	21%	20%	36%	21%
Germany	12%	20%	12%	41%
Austria	20%	20%	10%	43%
Poland	27%	24%	26%	18%
Hungary	22%	24%	34%	18%
France	25%	18%	21%	23%
Croatia	26%	18%	38%	13%
Italy	7%	16%	18%	48%
Spain	27%	30%	32%	10%
Portugal	19%	36%	26%	15%
Greece	27%	18%	25%	30%

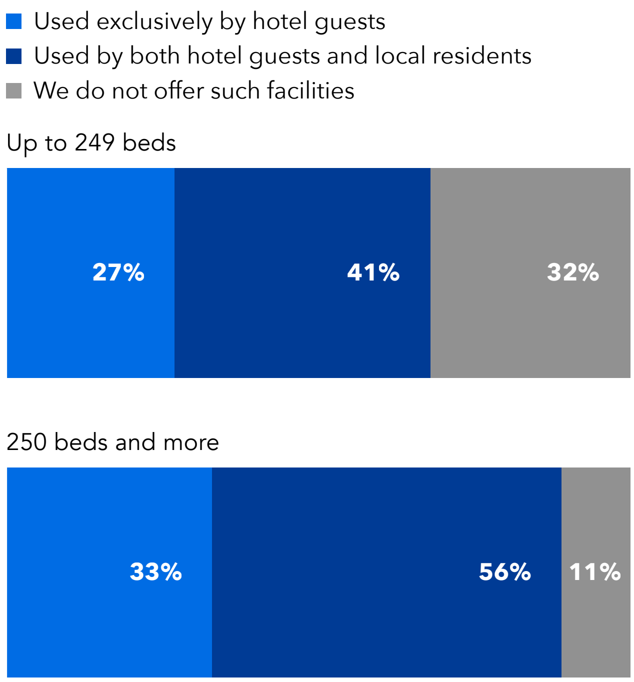
Share of non-labour operating budget spent on local vendors and suppliers, by accommodation type

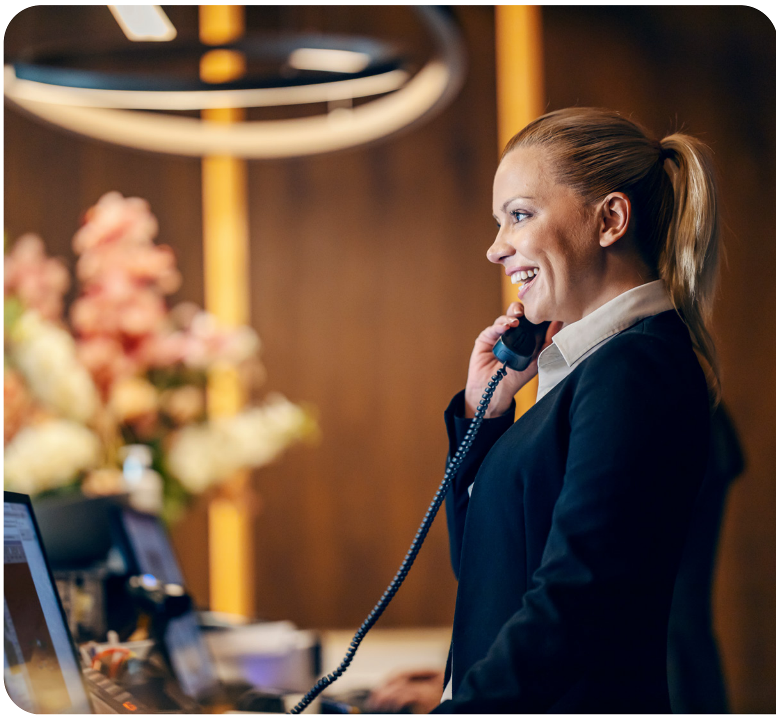


Smaller and independent accommodations are more likely to allocate a higher share of their budgets locally. This likely reflects a combination of more localised supply chains and a greater reliance on nearby providers, as well as a business model that is more closely embedded in the local economy.

In addition to their spending on local services, an average of 43% of European accommodations offer facilities that are open to residents, such as restaurants, meeting rooms, and fitness centers. Naturally, accommodations that are more likely to have these kinds of facilities, like accommodations with 250+ beds or 4–5 star hotels, are also better positioned to allow public access to these facilities (56% and 52%, respectively). Opening these amenities to the public can be mutually beneficial, generating additional revenue for the business while broadening the range of services available to the community.

Use of facilities by overnight guests, by number of beds





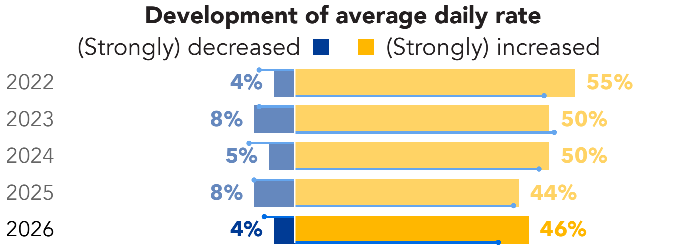
Appendix

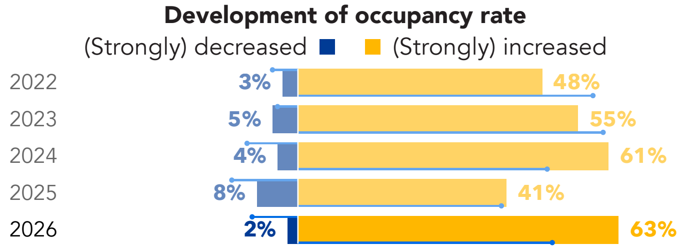
Country Insights

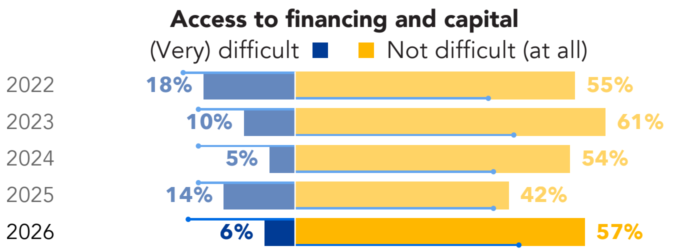
The Nordic countries

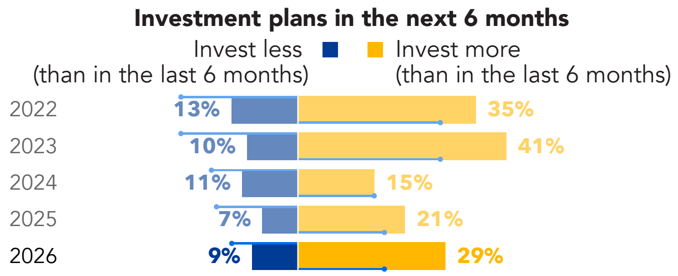
Nordic accommodations continue to report strong and optimistic sentiment, with with positive expectations for 2026 rising to 78%. Past and current performance assessments remain above or on par with EU averages. Occupancy growth was robust, with 63% reporting increases, well above the EU figure. Access to capital remains comfortable, with 57% reporting no difficulty and just 6% facing challenges. Investment appetite is notably higher than the EU average, with 29% planning to increase spending. On cybersecurity, 72% of Nordic accommodations feel their preparedness is sufficient, and just over half (52%) benefited from event-driven travel in the past year.

Development of accommodation business in the last 6 months ● EU average





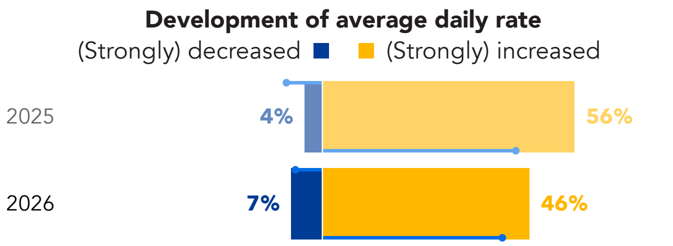


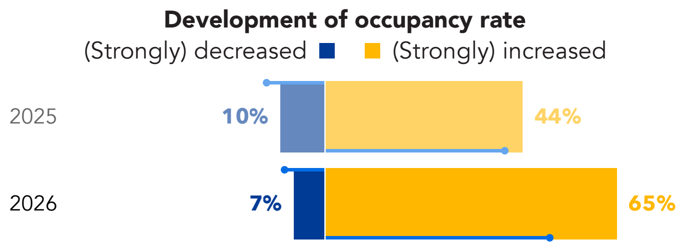


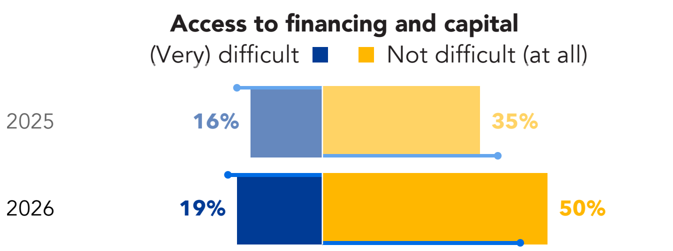
Ireland

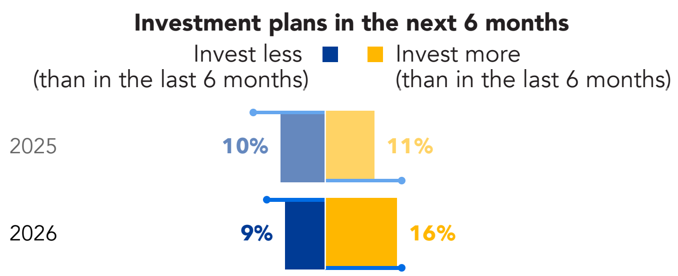
Ireland joined the European Accommodation Barometer as a separately tracked market last year. In its 2nd edition, local hoteliers report strong sentiment heading into the 2026 travel season, with three-quarters (75%) expecting positive developments. Occupancy growth was the strongest metric, with 65% reporting increases. Access to capital is reasonable, with half reporting no difficulty. Ireland stands out on cybersecurity, where 82% of accommodations feel their preparedness is sufficient, the highest share in Europe. Only 4% reported a cyber incident. Hiring and training remain priorities, and 45% of Irish accommodations benefited from event-driven travel. Investment appetite is steady, with 16% planning to increase and only 9% looking to cut back.

Development of accommodation business in the last 6 months ● EU average





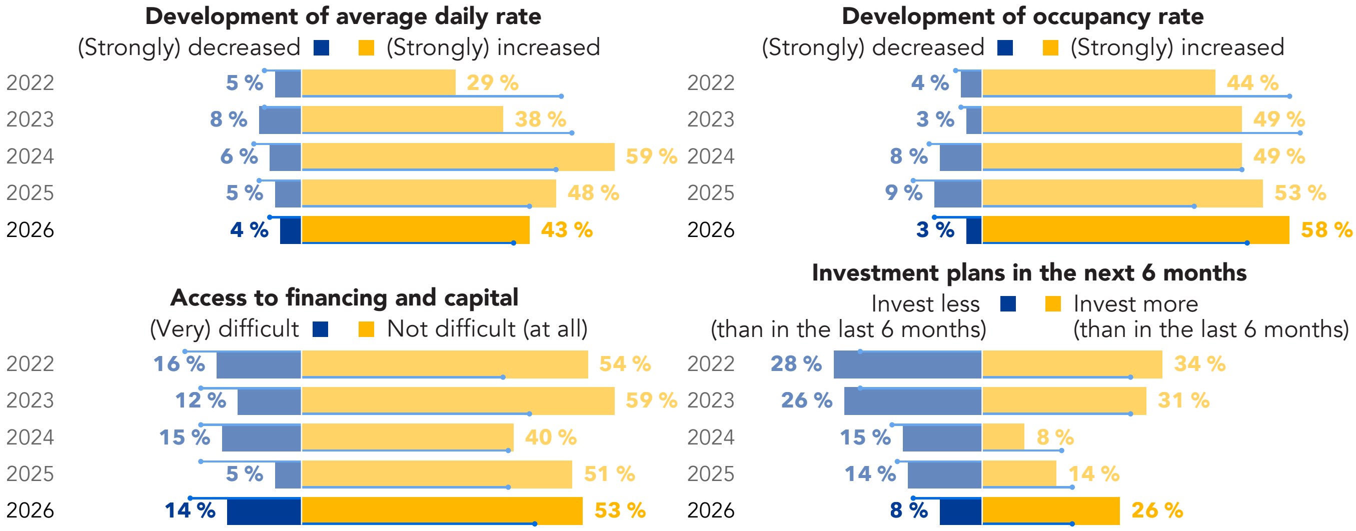




Netherlands

The sentiment in the Dutch accommodation industry remains strongly positive, with 77% expecting positive business development in the coming months, well above the EU average. Past and present performance ratings are among the highest share in Europe (68% and 71%, respectively). Occupancy growth was robust, with 58% reporting increases. Access to capital is notably easier than elsewhere, with 53% having no difficulty and just 14% reporting challenges. Investment appetite is healthy, with 26% planning to increase. Dutch accommodations also report high cybersecurity confidence (72%). Around half (51%) benefited from event-driven travel in the past year.

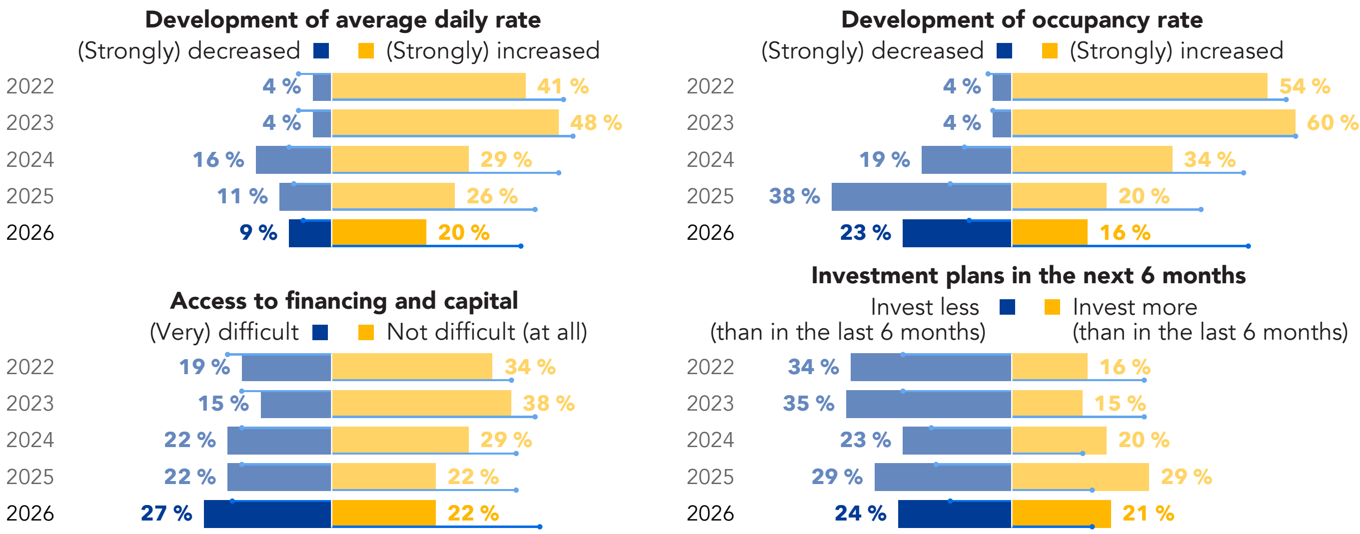
Development of accommodation business in the last 6 months ● EU average



Germany

German accommodations continue to navigate a challenging economic environment. Hoteliers assessed their recent business performance well below the European average, with just 41% rating it positively. Only 26% view the current situation as good, and 45% expect positive developments – below the EU figure but a notable recovery from the 33% recorded in 2025. Occupancy growth was limited (16%) and access to capital remains polarised (22% no difficulty, 27% report challenges). Investment plans are mixed, with 21% planning more and 24% planning less. On cybersecurity, just 55% feel sufficiently prepared, the lowest in Europe, while 64% benefited from event-driven travel.

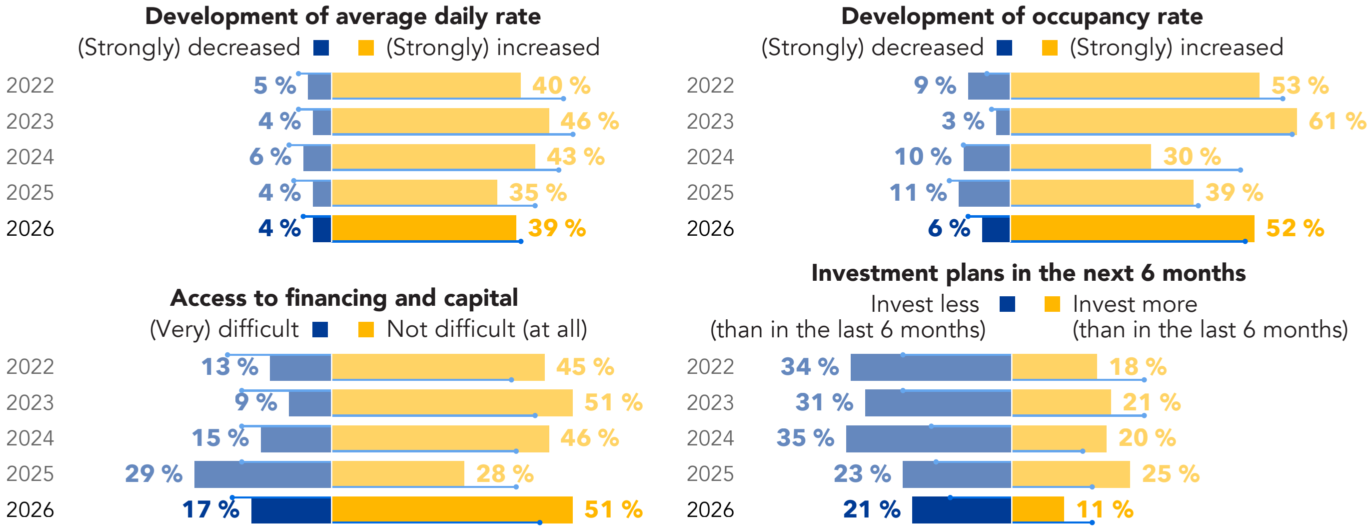
Development of accommodation business in the last 6 months ● EU average



Austria

Austrian accommodations report solid recent performance, with 68% rating past development positively and 72% satisfied with their current situation. However, expectations for the coming season are more cautious at 56%, below the EU average. Occupancy growth was healthy (52%) and access to capital comfortable (51% report no difficulty). Investment appetite has moderated, with 11% planning more and 21% planning less. On cybersecurity, 65% feel their preparedness is sufficient. Around 9% reported a cyber incident. Just over half (55%) of Austrian accommodations benefited from event-driven travel in the past year.

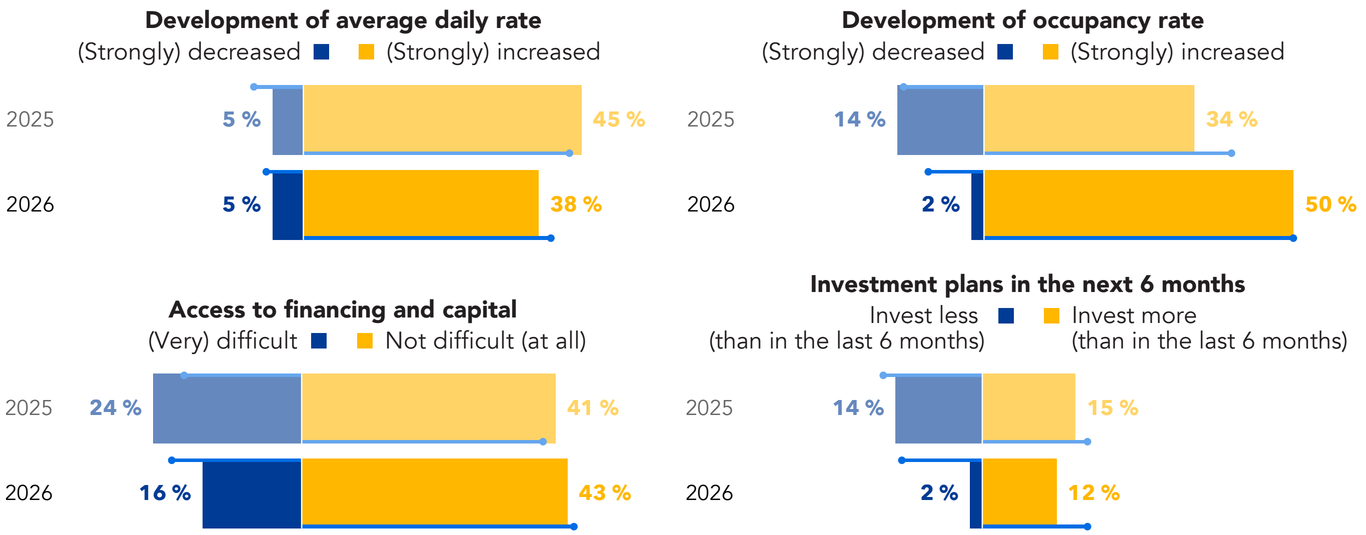
Development of accommodation business in the last 6 months ● EU average



Poland

Poland joined the European Accommodation Barometer as a separately tracked market in 2025 and continues to report sentiment broadly in line with the EU average. Room rate growth is solid at 38% and occupancy increases were reported by half (50%) of respondents. Access to capital is comfortable, with 43% reporting no difficulty. Investment plans are conservative but stable, with only 2% planning to cut back. On cybersecurity, 57% feel sufficiently prepared and 7% reported an incident. Poland is among the lower-performing markets with only 44% of Polish accommodations benefiting from event tourism, though this may reflect the country's still-developing event infrastructure.

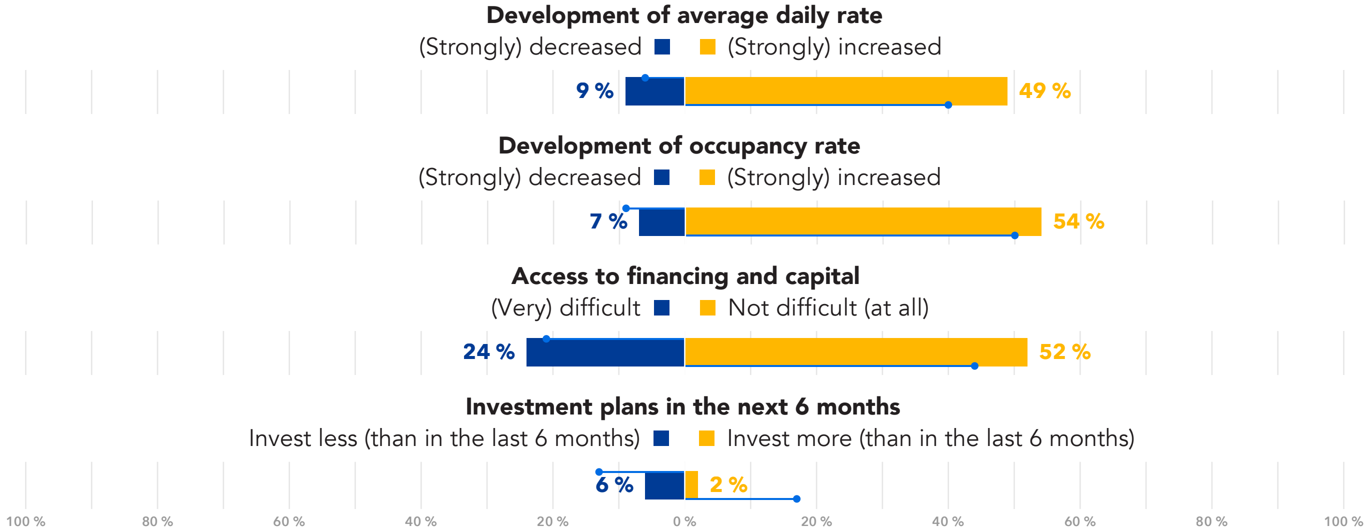
Development of accommodation business in the last 6 months ● EU average



Hungary

Hungary enters the 2026 Barometer as a newly tracked market, reporting solid overall sentiment. Some 62% rated both past and current conditions positively, and 69% expect positive future development. Room rate and occupancy growth are both healthy (49% and 54%, respectively). Access to capital is mixed, with 52% reporting no difficulty but 24% facing challenges. Investment plans are notably conservative, with just 2% planning more. On cybersecurity, 70% feel prepared and 8% reported an incident. Hungary has the lowest event tourism benefit rate at 23%, suggesting limited event infrastructure or awareness.

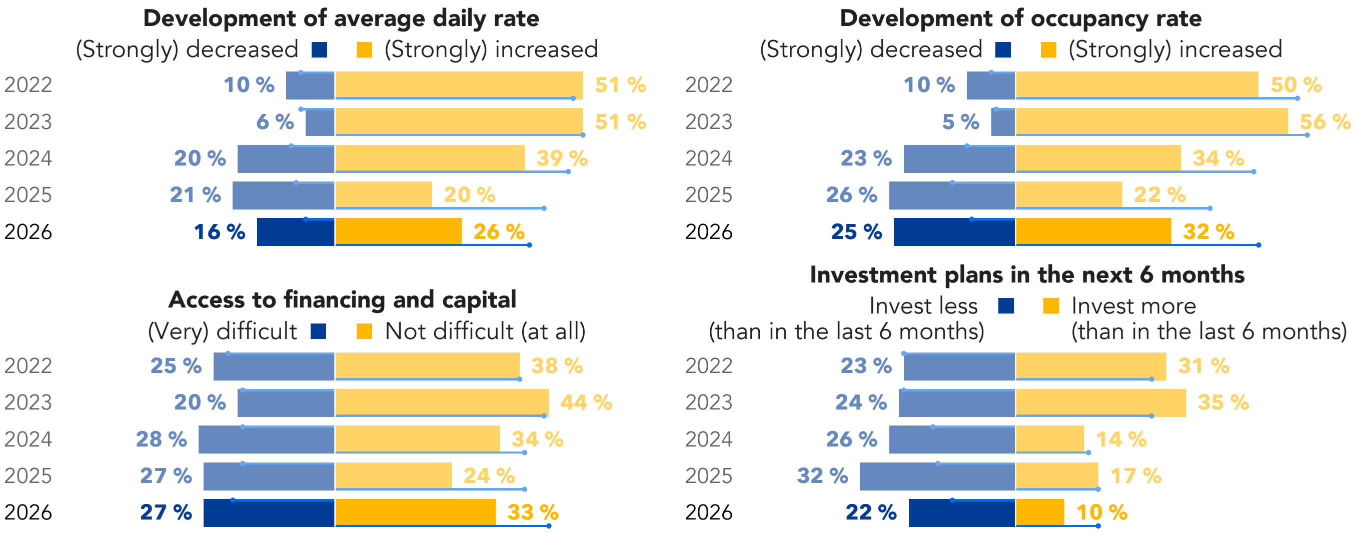
Development of accommodation business in the last 6 months ● EU average



France

French hoteliers remain cautiously optimistic heading into 2026. Around half (55%) expect positive developments, while overall sentiment trails the EU average. Room rate and occupancy growth are subdued (26% and 32%, respectively). Access to capital is mixed, with one-third (33%) reporting no difficulty and 27% facing challenges. Investment appetite is muted, with just 10% planning more and 22% planning less. France recorded the highest cybersecurity incident rate in Europe at 14%, while 60% feel their preparedness is sufficient. Almost two-thirds (63%) benefited from some form of event-driven tourism, though this high figure may partly reflect France's rich events calendar.

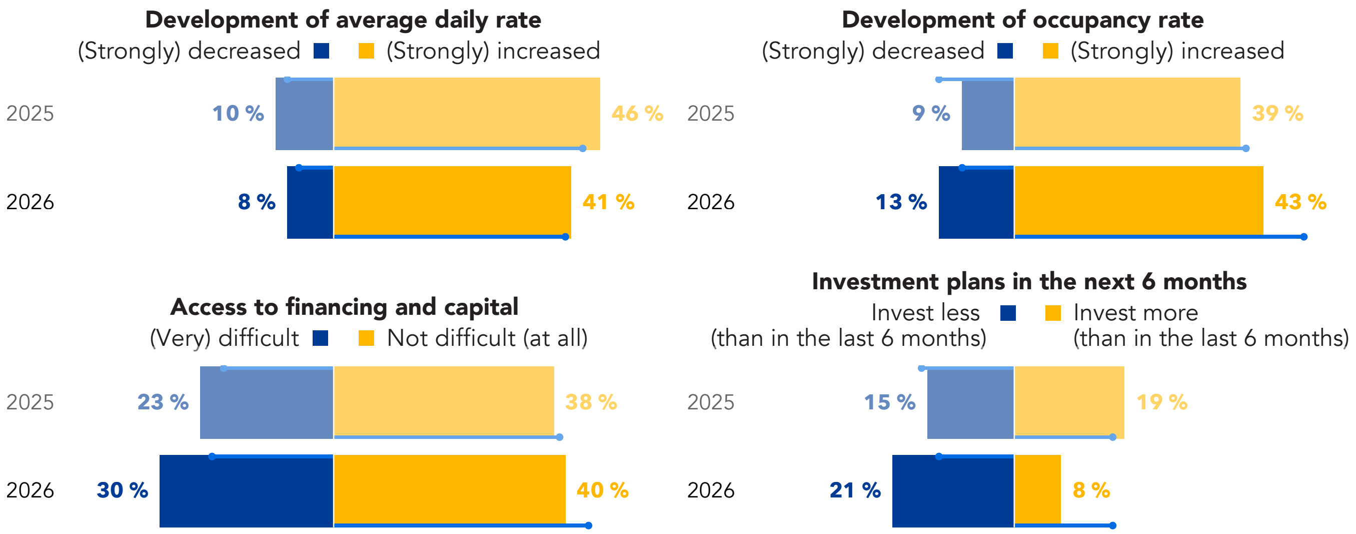
Development of accommodation business in the last 6 months ● EU average



Croatia

Croatia joined the European Accommodation Barometer as a separately tracked market in 2025. In its second edition, local accommodations head into the 2026 travel season with steady confidence, as two-thirds (67%) expect positive future development. Recent business performance was solid (54% rated it positively) and current conditions are viewed favourably (66%). Occupancy growth was reported by 43% and room rate increases by 41%. Access to capital remains a concern, with 30% reporting difficulty, the highest rate alongside Italy. Investment appetite is conservative, with just 8% planning more and 21% planning less. On cybersecurity, 64% feel prepared and only 4% reported an incident, one of the lowest rates in Europe. Just over a third (37%) benefited from event-driven travel.

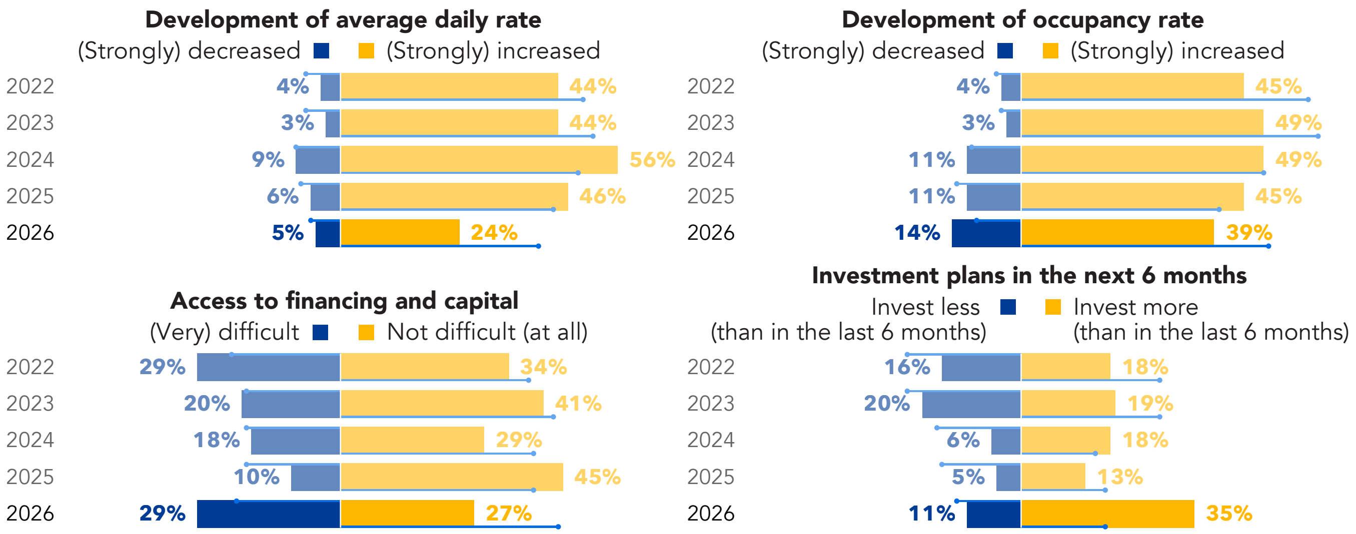
Development of accommodation business in the last 6 months ● EU average



Italy

Positive sentiment among Italian accommodations has dropped notably compared to last year's results: 60% anticipate positive development in the coming season, down from 84% last year. Past performance ratings softened to 46%, well below the EU average, and room rate growth was limited at 24%. However, Italy stands out for investment appetite, with 35% planning to increase their spending, the highest share in Europe, and just 11% looking to cut back. Remarkably, no Italian respondents reported a cybersecurity incident (0%), while 59% feel their preparedness is sufficient. Around six in ten (61%) benefited from event-driven travel, and many open-ended responses referenced staffing concerns and the geopolitical

Development of accommodation business in the last 6 months ● EU average

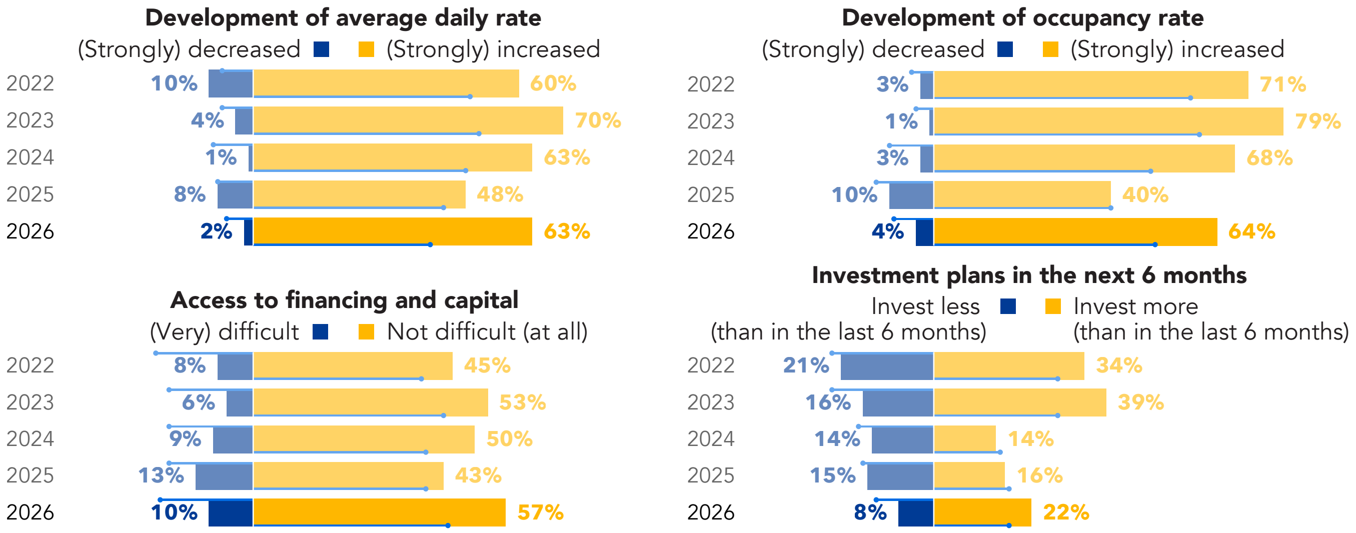


climate.

Spain

Spanish accommodations continue to report some of the strongest business performance in Europe: 70% rated past development positively, 76% are satisfied with the current situation, and 82% expect positive developments ahead – the highest future outlook in Europe. Room rate growth is the strongest on the continent (63%) and occupancy increases were reported by 64%. Access to capital is comfortable (57% no difficulty). Investment appetite is healthy, with 22% planning to invest more. On cybersecurity, 72% feel sufficiently prepared, though 13% reported an incident. Around half (53%) benefited from event tourism.

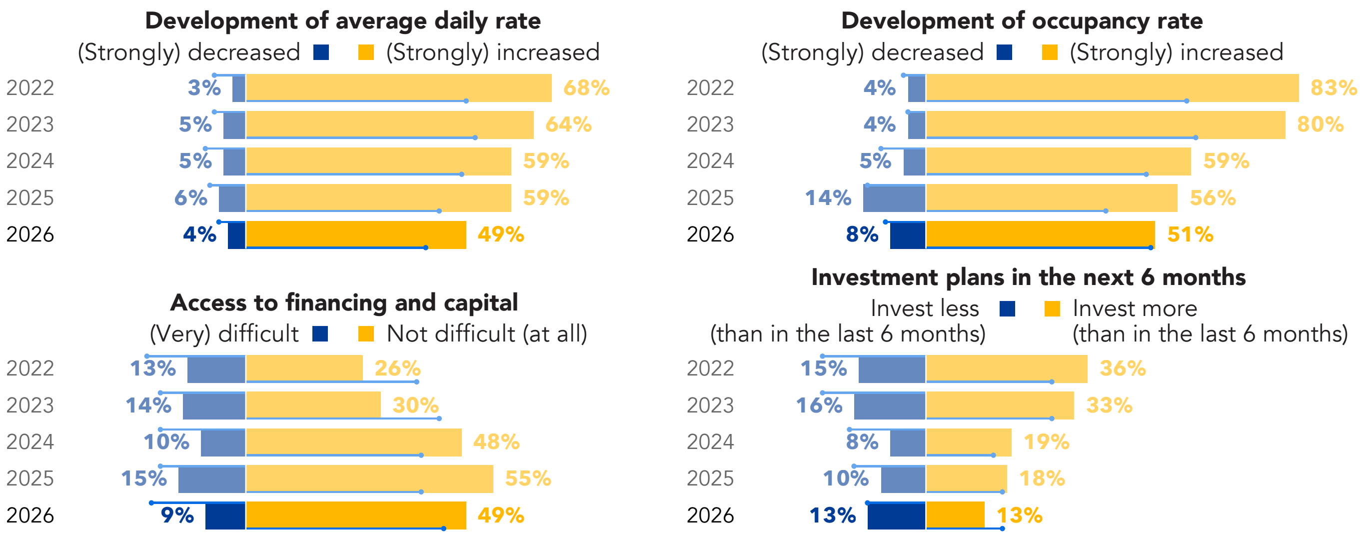
Development of accommodation business in the last 6 months ● EU average



Portugal

Portuguese accommodations are among the most optimistic in Europe: 77% expect positive future developments and 67% view current conditions favourbly. Room rate growth remains strong compared to the rest of the EU and occupancy growth is solid (51%). Access to capital is rated more favourably than the EU average, with 49% reporting no difficulty and just 9% facing challenges. Investment plans are balanced, with 13% planning to invest and 13% less. On cybersecurity, 67% feel their preparedness is sufficient. Almost half (47%) benefited from event-driven travel.

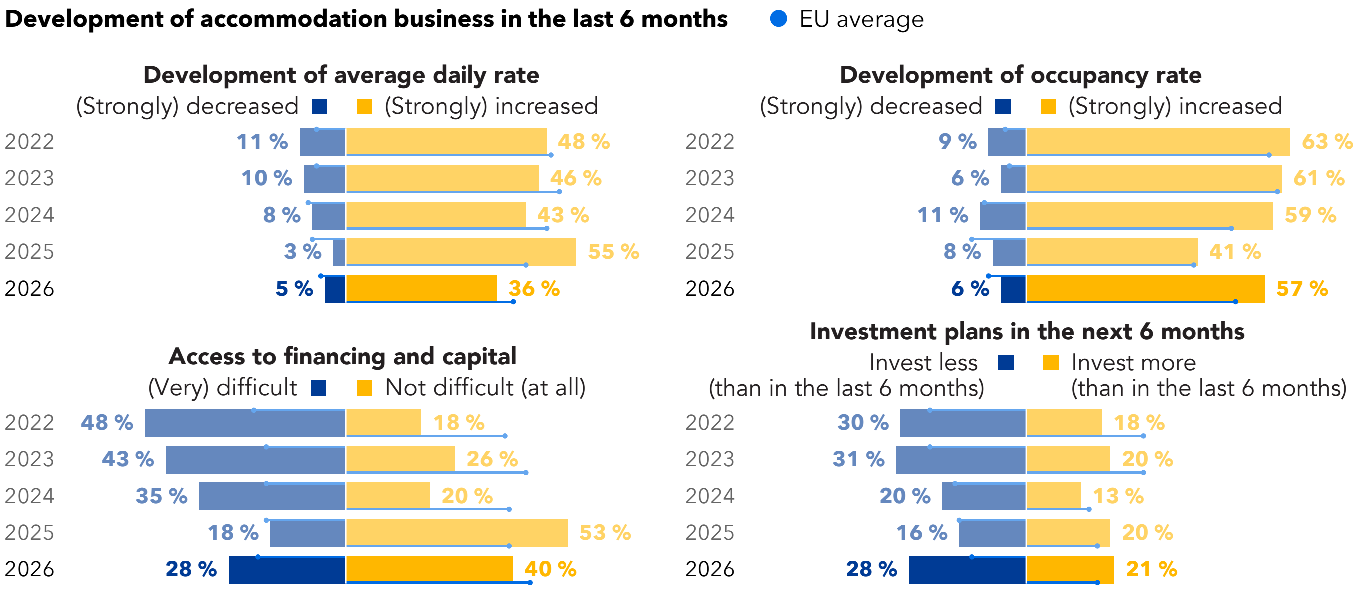
Development of accommodation business in the last 6 months ● EU average



Greece

Greece continues to lead European accommodation sentiment on past business development: 71% rated it positively, the highest share in Europe. Current conditions are viewed favourably by 65% and nearly three-quarters (73%) expect positive developments in the coming season. Occupancy growth was strong (57%) and access to capital is rated at 40% no difficulty, though 28% report challenges. Investment plans are mixed at 21% investing more and 28% less, reflecting caution despite overall optimism. On cybersecurity, 65% feel prepared and only 6% reported an incident. Six in ten (60%) benefited from event-driven travel.

Development of accommodation business in the last 6 months



Oia village on Santorini, Greece

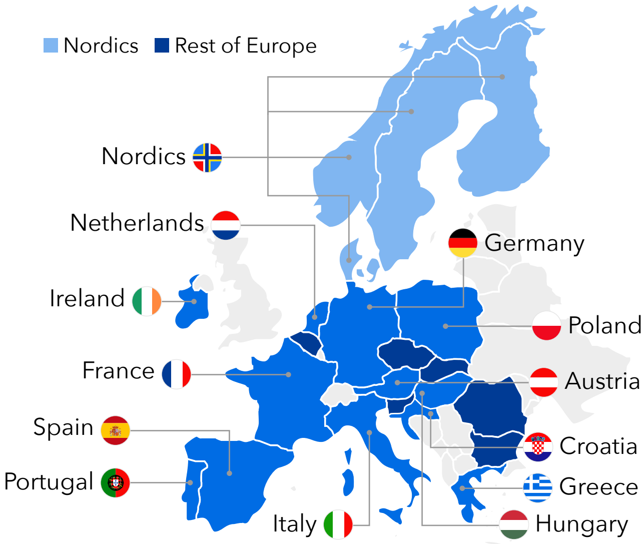
List of Survey Questions

- How do you characterise 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 characterise the 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 characterise 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? Will you...?
(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")
- Think of both likelihood and potential business impact. What are the three top concerns for your accommodation business in the next 12 months? (Maximum 3 answers)
- Overall, how would you assess your accommodation's level of cybersecurity preparedness given the digital risks you are exposed to?
(Answers are on a scale of 1 to 5, from "not sufficient at all" to "fully sufficient")
- Which of the following cybersecurity measures are already implemented in your accommodation?
(Multiple answers possible)
- In the past 12 months, has your accommodation been directly affected by any cybersecurity or data security incident?
(Single-choice question)
- In your opinion, when guests book online (either directly or via intermediaries), what are the three most critical factors for building consumer trust?
(Maximum 3 answers)
- Which strategies are you using to mitigate the effects of seasonality and sustain guest flows year-round?
(Multiple answers possible)
- How effective do you consider the following channels, strategies and methods in helping you secure off-season stays?
(Answers are on a scale of 1 to 5, from "very effective" to "not effective at all" and "we do not use this channel")
- In the past 12 months, has your accommodation benefited from event-driven travel related to events held in your area (e.g., higher occupancy or increased sales), such as conferences or trade fairs, concerts, sports events, exhibitions, or local cultural festivals?
(Single-choice question)
- Regardless of whether positive or negative impact: How has your accommodation been directly impacted by event-driven travel?
(Respondents who were impacted by event travel, multiple answers possible)
- Looking ahead, how would you like to see your property engage with event-driven tourism?
(Multiple answers possible)
- When a major event takes place in your area, which of the following operational adjustments does your accommodation typically make?
(Multiple answers possible)
- Approximately what percentage of your property's total non-labor operating budget (e.g., food, laundry, maintenance, décor) is spent with vendors and suppliers located within a 50km radius of your property?
(Single-choice question)
- Which of the following best describes the use of your property's facilities (e.g., meeting rooms, restaurants, fitness/wellness areas) by local residents who are not overnight guests?
(Single-choice question)

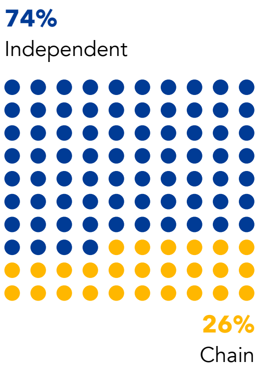
Methodology

The 2026 survey was conducted by Statista and took place between February 5th and March 24th, via telephone interviews. 1,240 executives and managers from the European travel accommodation sector participated in the survey. 80 respondents were interviewed from the Nordics, Ireland, Netherlands, Germany, Austria, Poland, France, Croatia, Italy, Spain, Portugal, Greece, Hungary. An additional 200 respondents from Romania, Belgium, Czech Republic, Bulgaria, Slovenia, and Slovakia were also included in the EU average results.

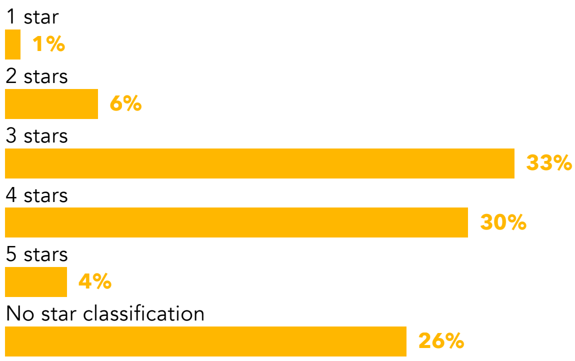
Note: around half of the interviews were completed before late February 2026, while the remainder were conducted afterwards, coinciding with an escalation in tensions in the Middle East. This context should be considered when interpreting the data.



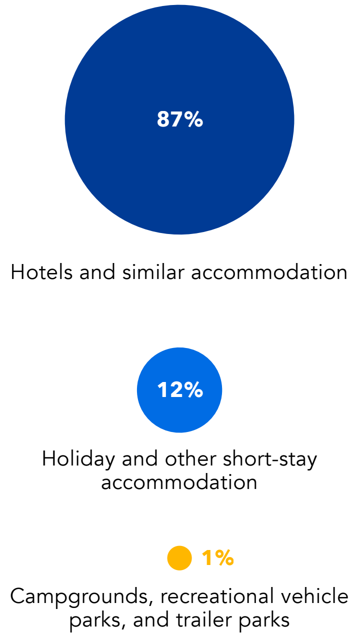
Business type



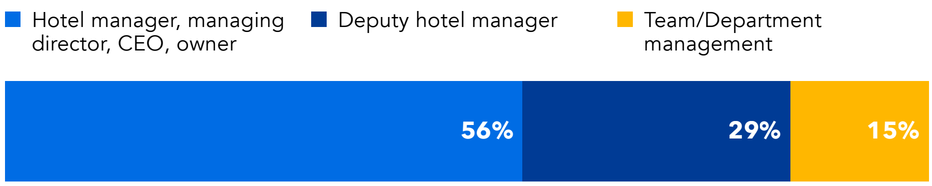
Star classification



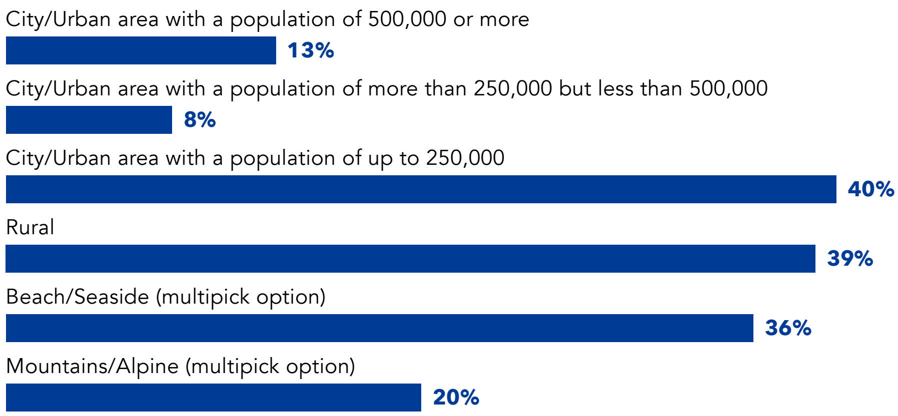
Accommodation type*



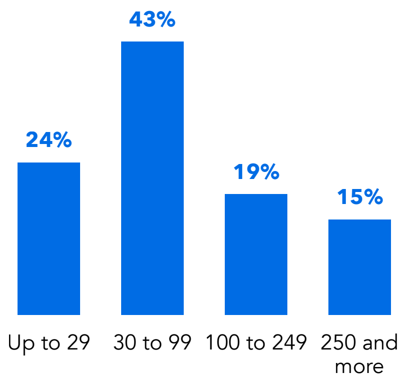
Position



Accommodation location



Number of beds



Percentage totals may differ from 100% due to rounding

* To ensure a sufficient base for analysing holiday and other short-stay rentals separately, the 2026 sample includes a higher share of alternative accommodations compared to previous years (Hotels and similar accommodation: 68%, Holiday and other short-stay accommodation: 29%, Campgrounds and similar: 3%). To ensure comparability over time, results in this report have been weighted to align with the distribution used in previous editions.

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