

INDUSTRIES & MARKETS

# Hotels - Market Data Analysis & Forecasts



# Agenda

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Key market indicators

## **02 Hotels**

Revenue worldwide and users by region

Average revenue per user

Global online and offline revenue

User penetration

## **03 Appendix**

Recommended studies & reports

Country/territory coverage

Product overview and authors

## CHAPTER 01

# Overview

- Key market indicators



# Various factors influence the Travel and Tourism market

Key market indicators: socioeconomic overview



## Consumer Spending

**US\$7.595**

Average consumer spending in 2021

**43%**

Growth 2021-2026

Average consumer spending per capita of private households in US\$. Knowing the expenditure per capita gives necessary insights into price developments and the average willingness to pay.



## Population

**7.5bn**

Population in 2021

**5%**

Growth 2021-2026

Number of individuals (all ages). The number of individuals living in a country is a key indicator for the size of the market.



## Income

**US\$173.916**

Average income in 2021

**26%**

Growth 2021-2026

The average income in countries which is a key indicator for wealth and is connected to travel and leisure activities.



## Tourism Expenditure

**281**

in \$US per capita in 2021

**-7%**

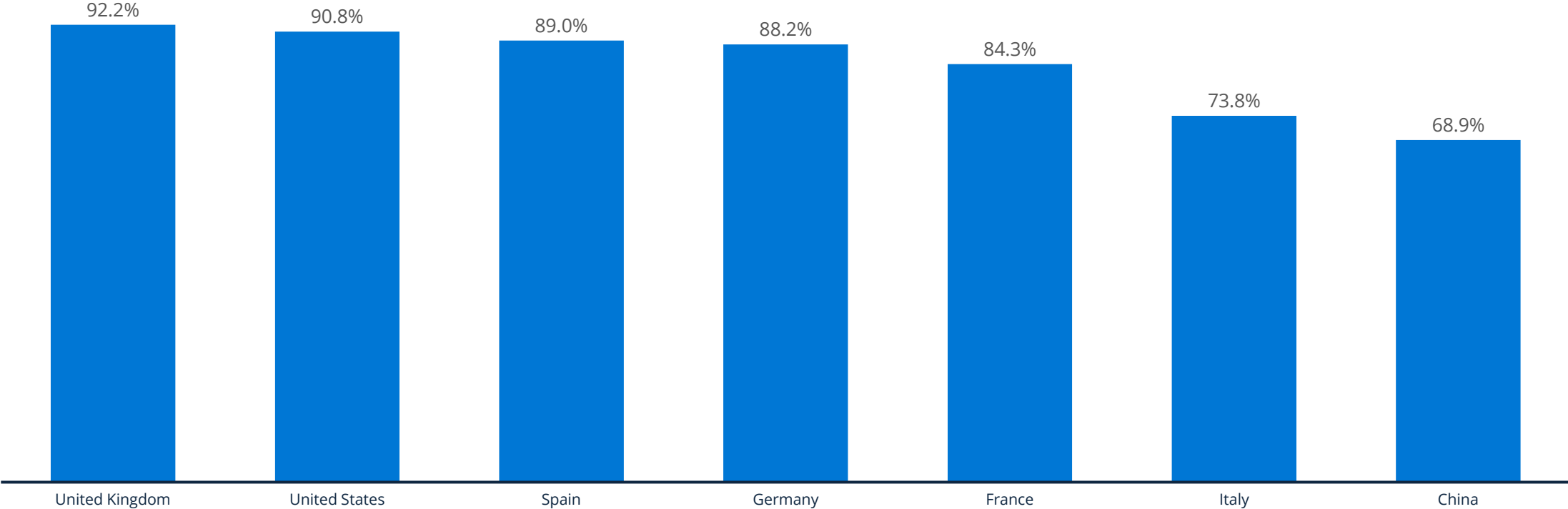
Growth 2021-2026

International tourism expenditures are expenditures of international outbound visitors in other countries, including payments to foreign carriers for international transport.

# Internet penetration is especially high in some European countries, whereas progress in China is significantly lower

Key market indicators: internet penetration

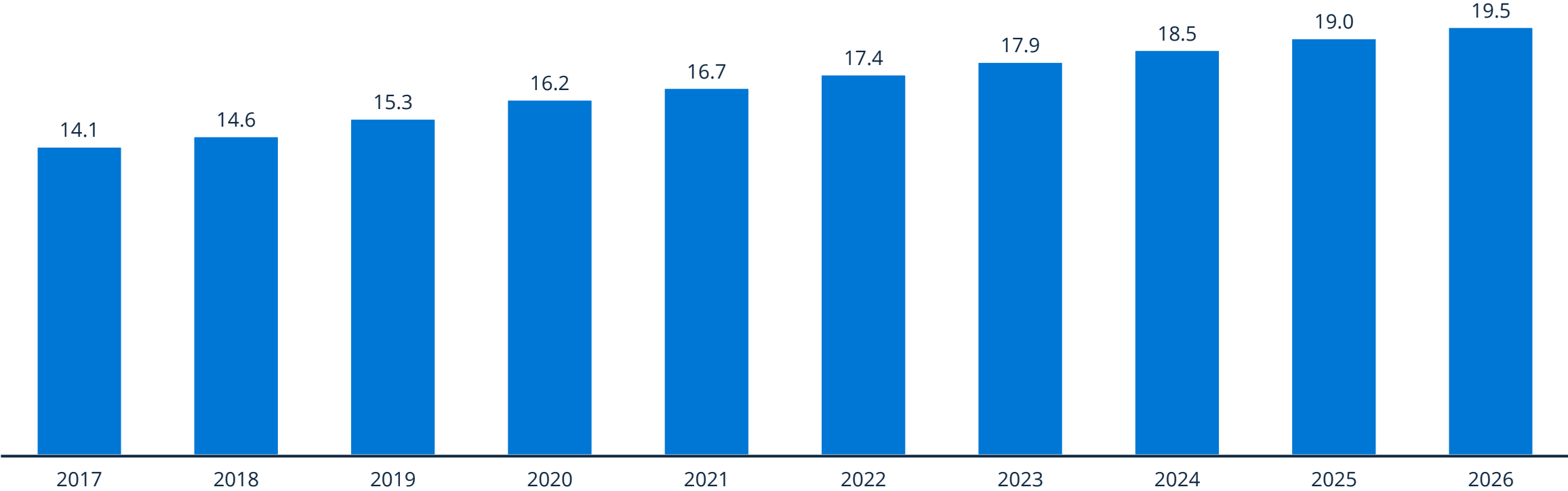
## Internet penetration in 2021



# From a global perspective, broadband subscriptions are continuously rising

Key market indicators: fixed broadband subscriptions and average connection speed

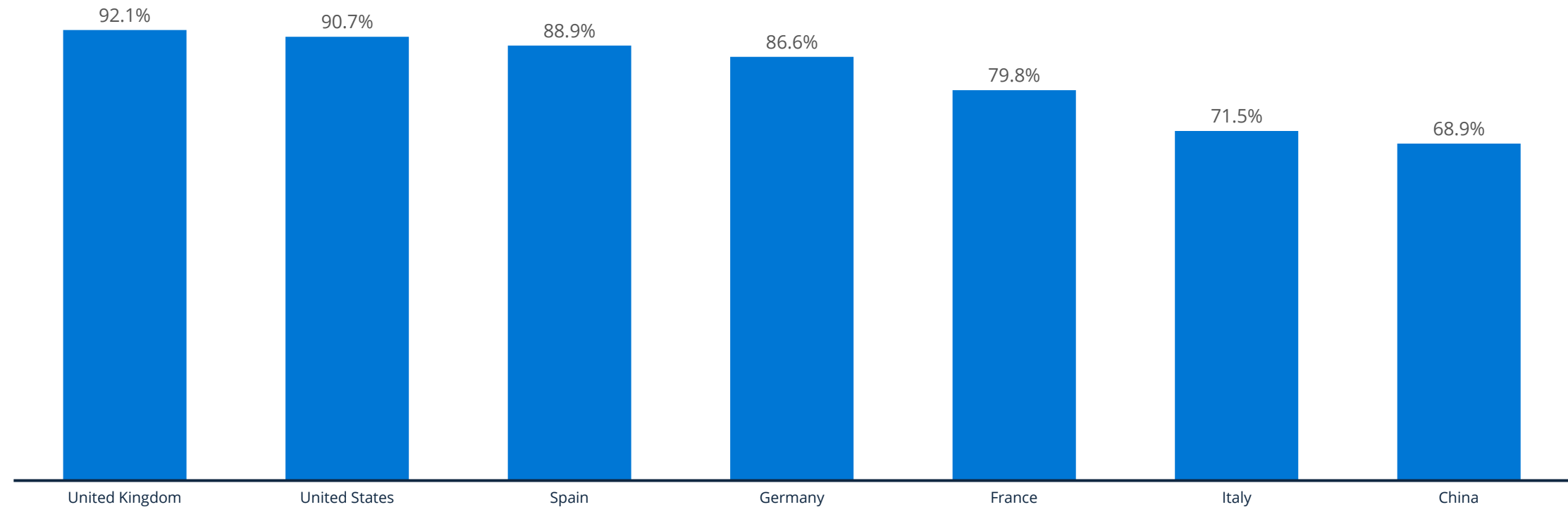
**Global fixed broadband subscriptions per 100 capita**



# The United Kingdom has the highest smartphone penetration rate in 2021

Key market indicators: smartphone penetration

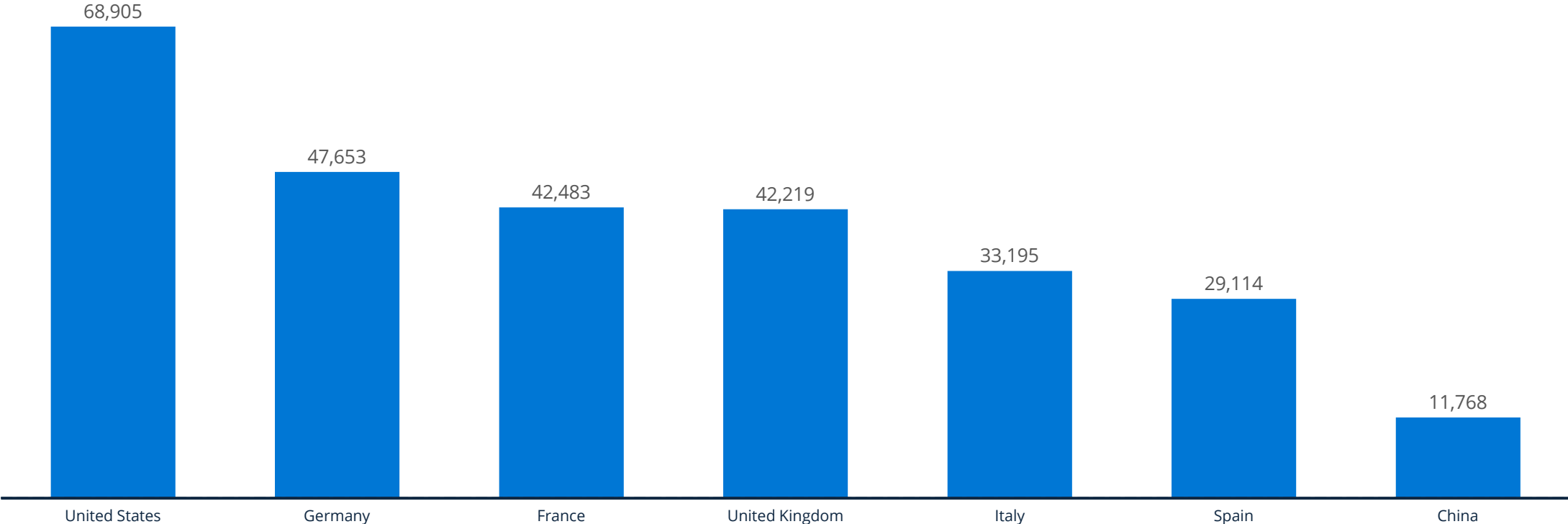
## Smartphone penetration in 2021



# GDP per capita is by far highest in the United States, followed by Germany

Key market indicators: gross domestic product

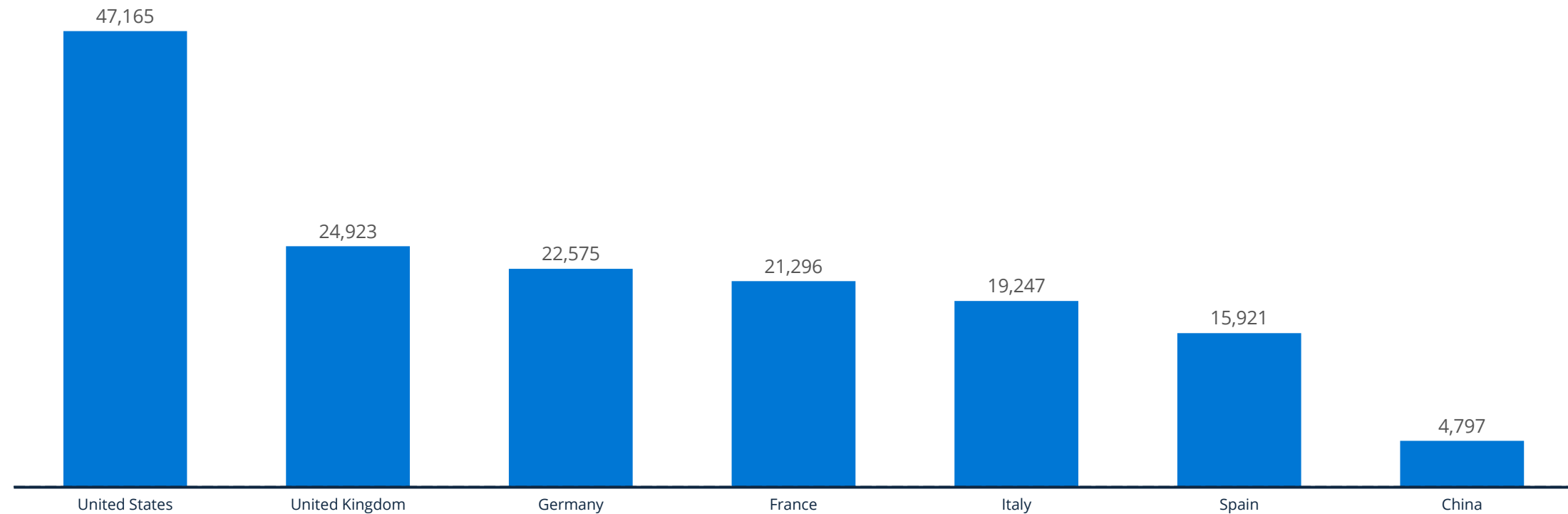
Gross domestic product per capita in 2021 in US\$



# Per-head consumption expenditure in the U.S. is more than 10 times higher than in China

Key market indicators: consumer spending

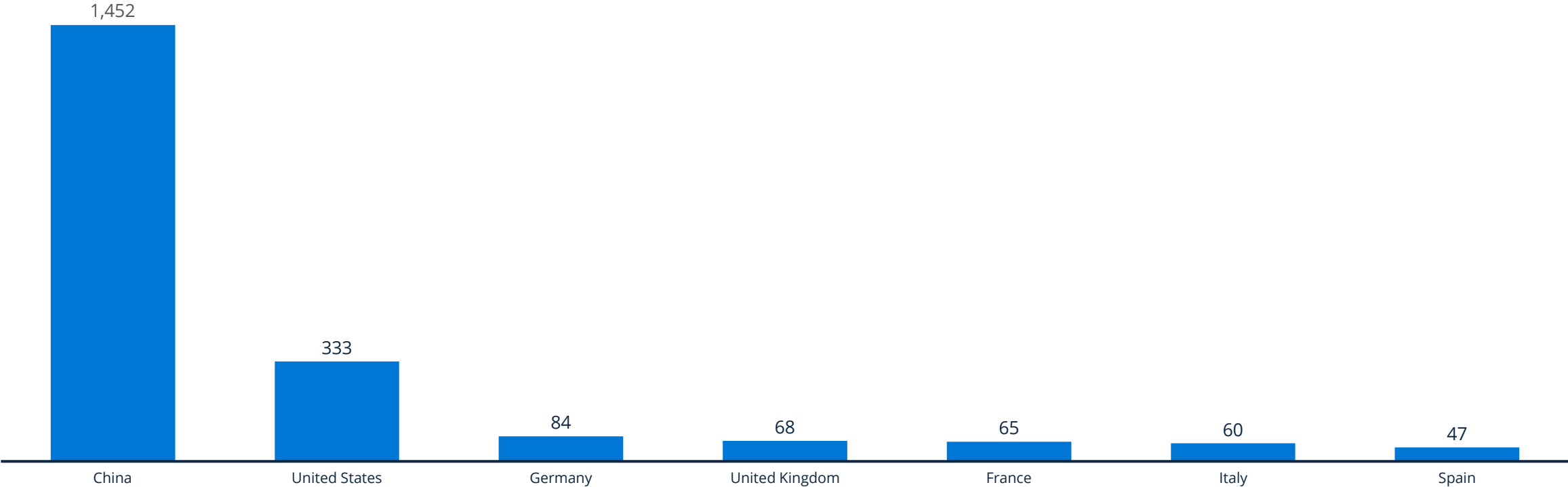
## Consumer spending per capita in 2021 in US\$



# China has by far the largest population, and therefore has the potential to become the biggest mobility market worldwide

Key market indicators: population

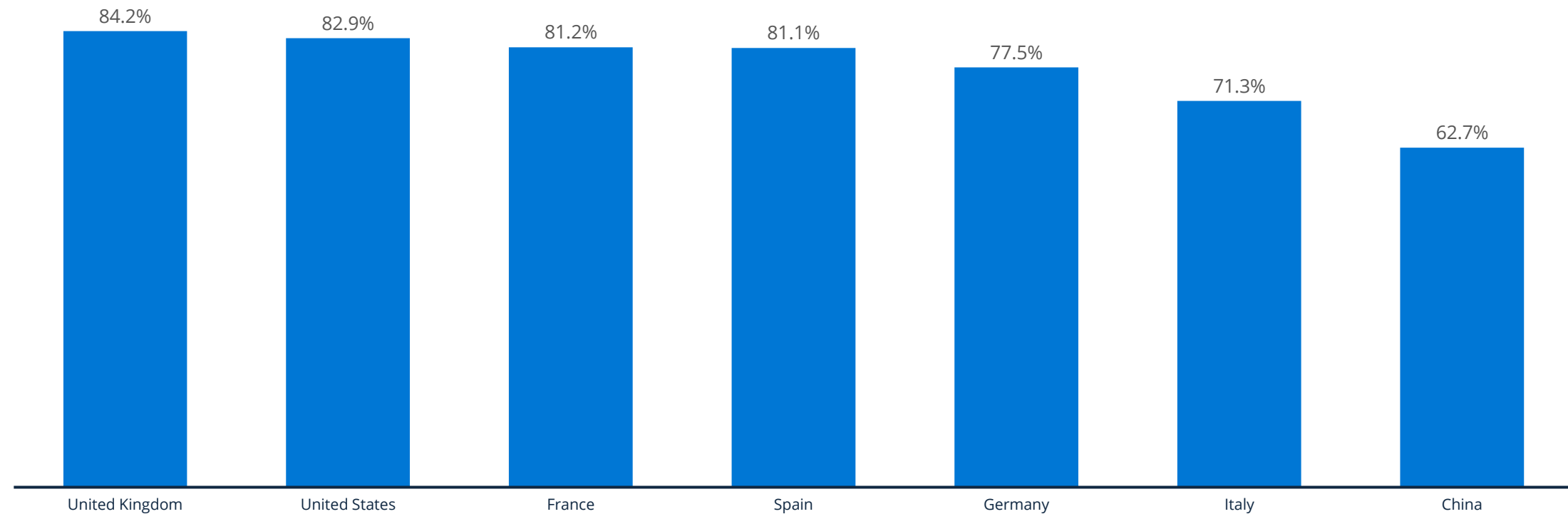
Population in 2021 in million



# About 75% of the European and about 57% of the global population are living in urban areas

Key market indicators: urban population

## Urban population share in 2021



## CHAPTER 02

# Hotels

- Revenue worldwide and users by region
- Average revenue per user
- Global online and offline revenue



HOTEL

# Hotels are an institution all around the world

Overview: market definition



- The Hotels segment includes hotels and professionally-run guest houses.

The Hotels segment will keep its pole-position among the Travel & Tourism segments, when it comes to revenues and user penetration rate.

## + In scope

- The Hotels segment includes hotels and professionally-run guest houses
- Booked directly via the providers website, through a tour operator, an online travel agency (OTA), a travel agency or by telephone
- The booking volume includes all booked travels made by users from the selected region, independent of the departure and arrival

## - Out of scope

- Private accommodation and holiday flats, private room and accommodation rentals (e.g., Airbnb)

# Hotels is the largest segment of the Travel & Tourism market

Overview: customer benefit and market development

## Customer benefit

There is a great variety of quality of services when choosing a professionally-run guest house as accommodation. Booking a simple room at a one- or two-star hotel is as much possible in most tourist destinations as booking a fancy suite.

The share of online hotel bookings already exceeds the offline share of bookings. Booking hotel rooms online is both convenient and time-saving since there is no need to go to a travel agency to buy tickets, furthermore, some websites and apps store credit card details, enabling an effortless booking and payment process. Another benefit of booking rooms in a professionally-run guest house online is the quick and easy comparison of prices. Users can see prices for specific periods and book their accommodation (e.g., during off-peak times).

## Market size and future development

Hotels is the largest segment of Travel & Tourism, with US\$2.15 billion in 2021, which makes up almost half of the Travel & Tourism market.

The Hotels segment is very dominant in all the three regions that we would like to highlight. The U.S. Hotels market is the largest with a revenue of US\$68.74 billion in 2021, followed by China (US\$47.44 billion) and Europe with a market size of US\$34.39 billion.

When comparing the User penetration of countries, Singapore is number one, having 36% of the population spent at least one night in a professionally-run guest house last year, followed by the U.S. (32%) and Canada (31%).

The fastest-growing region is China with a 5% CAGR from 2017 to 2026, resulting in a market volume of US\$102.82 billion in 2026.

# Sustainability and individual offers might be the buzzwords of the future of Hotels

Overview: assumptions and trends

## Assumptions

We expect Hotels to stay the largest segment of the Travel & Tourism market.

We assume that two trends will continue in the years ahead of us. First of all, the share of online bookings will further increase on the cost of offline bookings, since internet and smartphone penetration is growing worldwide, and active internet users tend to book their trips online.

The other trend we await to progress is the growing share of hotel bookings through online travel agencies. The result of this tendency could be that hotels would depend even more on their rankings and reviews on online travel booking websites.

## Trends

Hotels became very dependent on online booking platforms in the last decade. The majority of hotel rooms are already booked online via online travel booking platforms, and only the minority of hotel bookings are made directly on the websites of hotels or via telephone. Hotels pay commission fees for the online travel agencies (OTA) for the bookings made through them. Another aspect of this dependency is the importance of reviews of hotels written by guests on the websites of online booking websites.

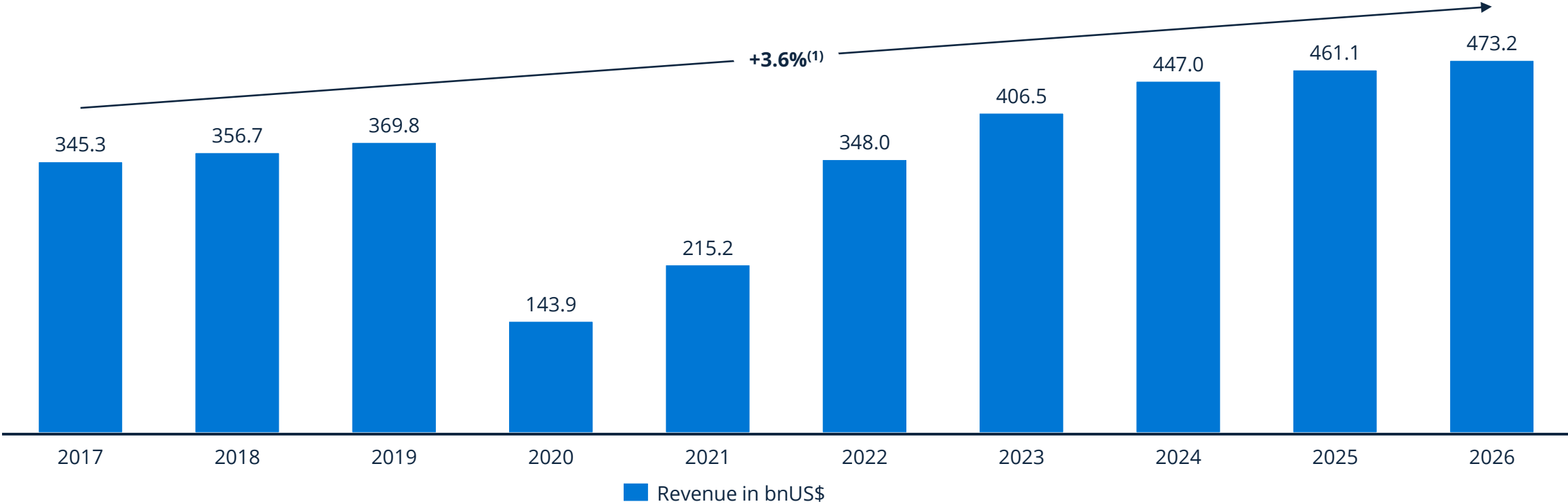
The sustainability of hotels is a very current topic as well. As hotel guests have been becoming more and more environmentally conscious, the number of sustainable hotels are also rising. Just to mention some examples, they usually only use environmentally-friendly products (cleaning products, etc.), buy regional food, and use solar panels to generate electricity.

Since the demand for personalized travel has been emerging, hotels offering more individualized services are expected to be rather competitive in the future than hotels offering standardized accommodation services.

# Global revenues in the Hotels segment are expected grow at a CAGR<sup>(1)</sup> of 3.6%

Hotels: global revenues

Hotels revenues worldwide in billion US\$



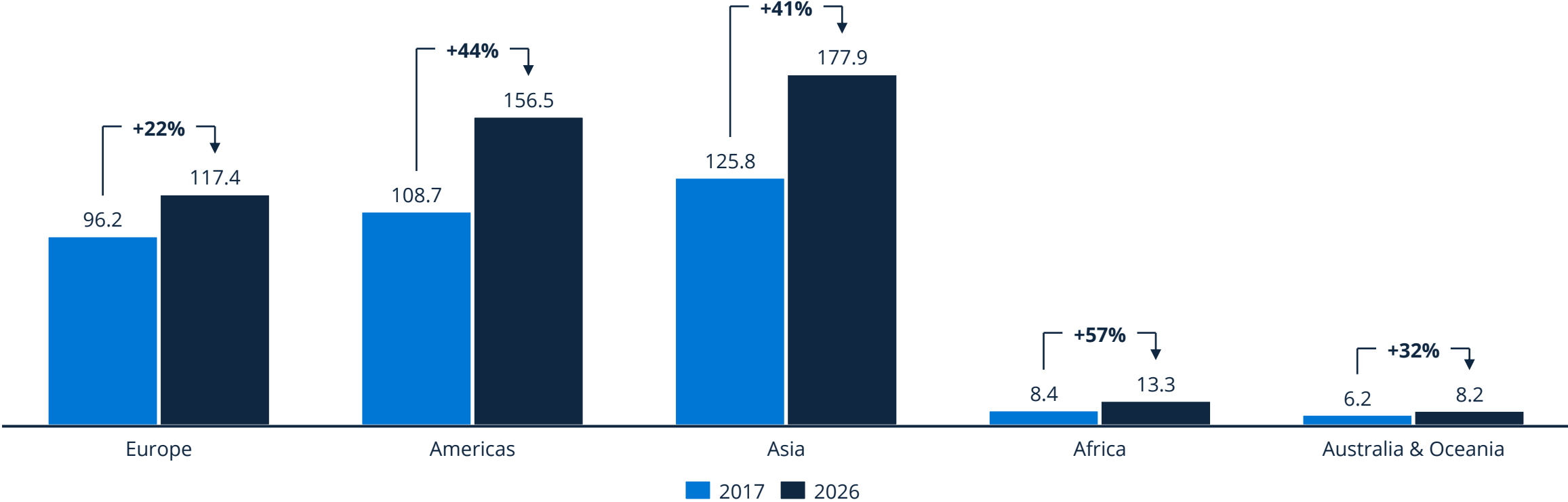
16 | Notes: (1) CAGR: Compound Annual Growth Rate / average growth rate per year

Sources: Statista Mobility Market Outlook 2022

# In Africa, the revenue for Hotels is expected to grow by 57% between 2017 and 2026

Hotels market sizes: regional comparison (1/2)

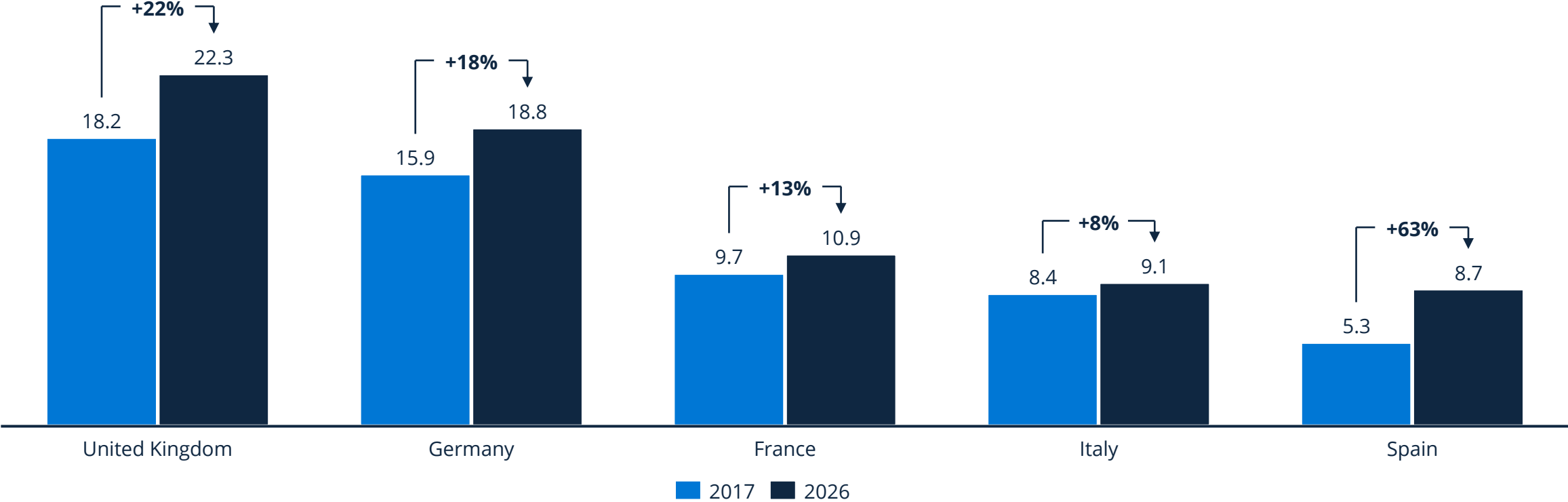
Hotels revenues in billion US\$



# With revenues of US\$22.25 billion, the U.K. will have biggest market among Europe's Top 5 in 2026

Hotels market sizes: regional comparison (2/2)

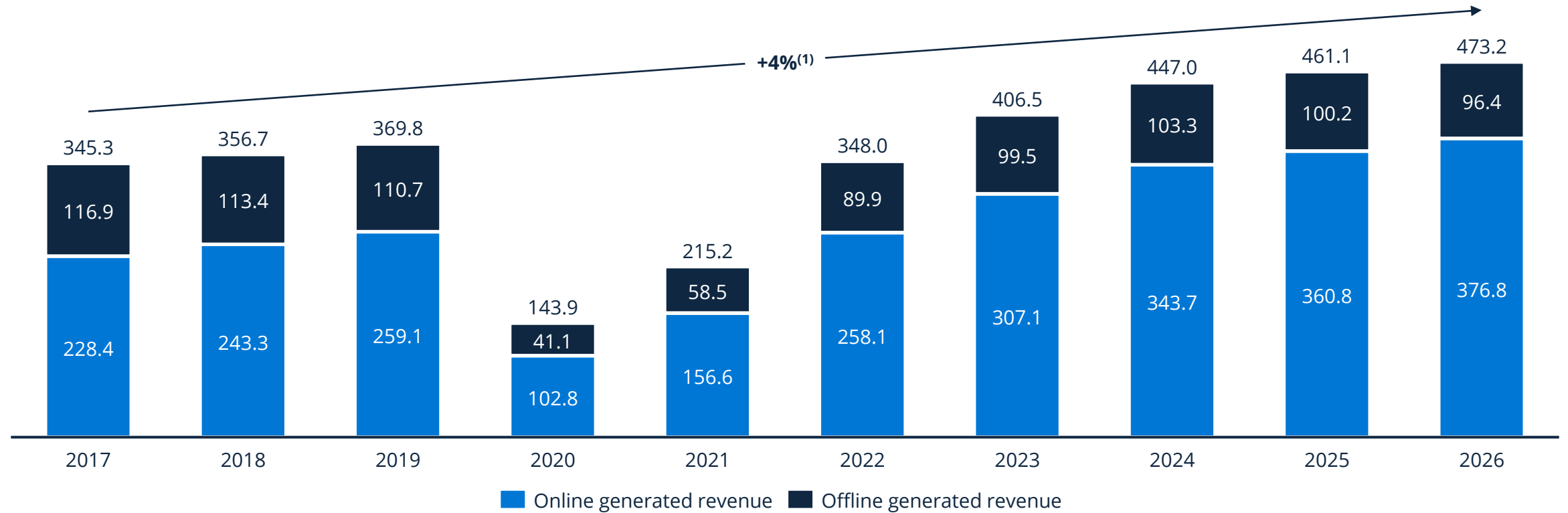
Hotels revenues in billion US\$



# An increasing share of Hotels segment bookings are conducted online

Hotels market sizes: global online and offline

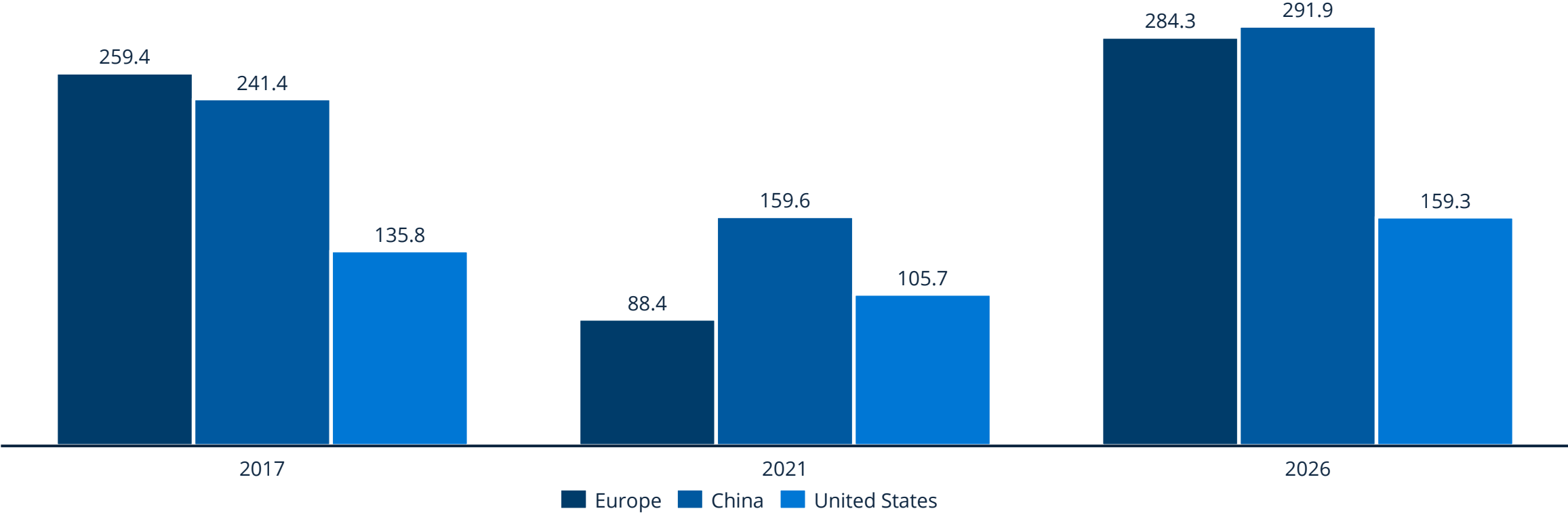
Global online and offline generated revenue forecast of Hotels in billion US\$



# In %endyear, most users in the Hotels segment will live in Europe

Hotels users: regional comparison (1/2)

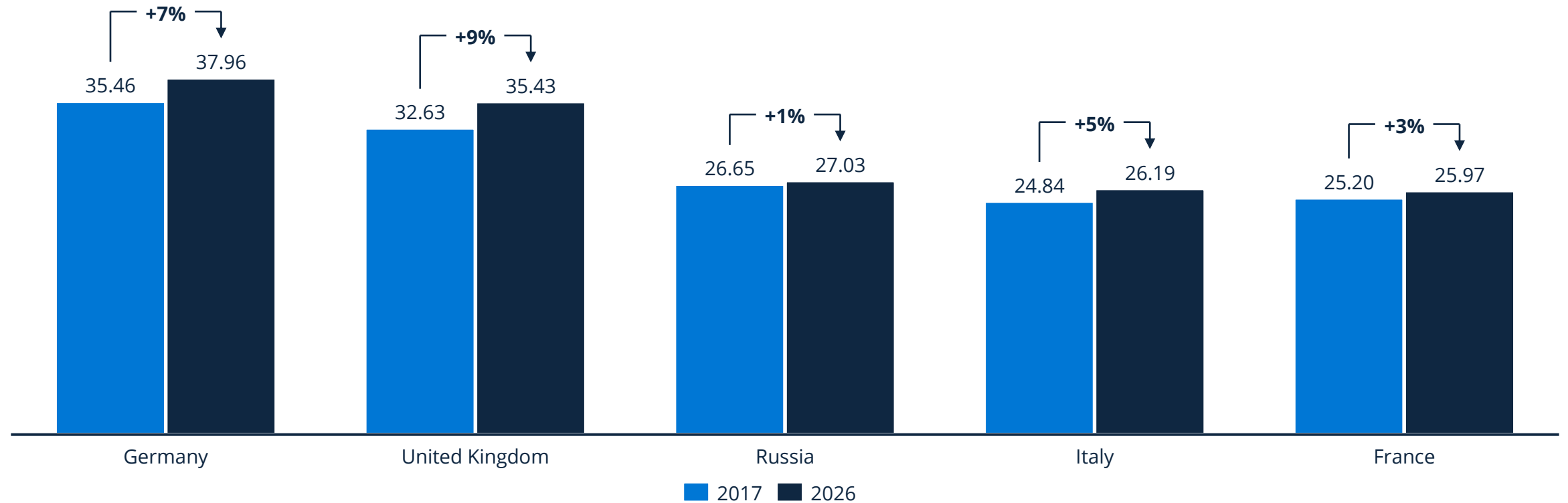
## Hotels users in millions



# With users of 37.96 million , Germany will have the most users among Europe´s Top 5 in 2026

Hotels users: regional comparison (2/2)

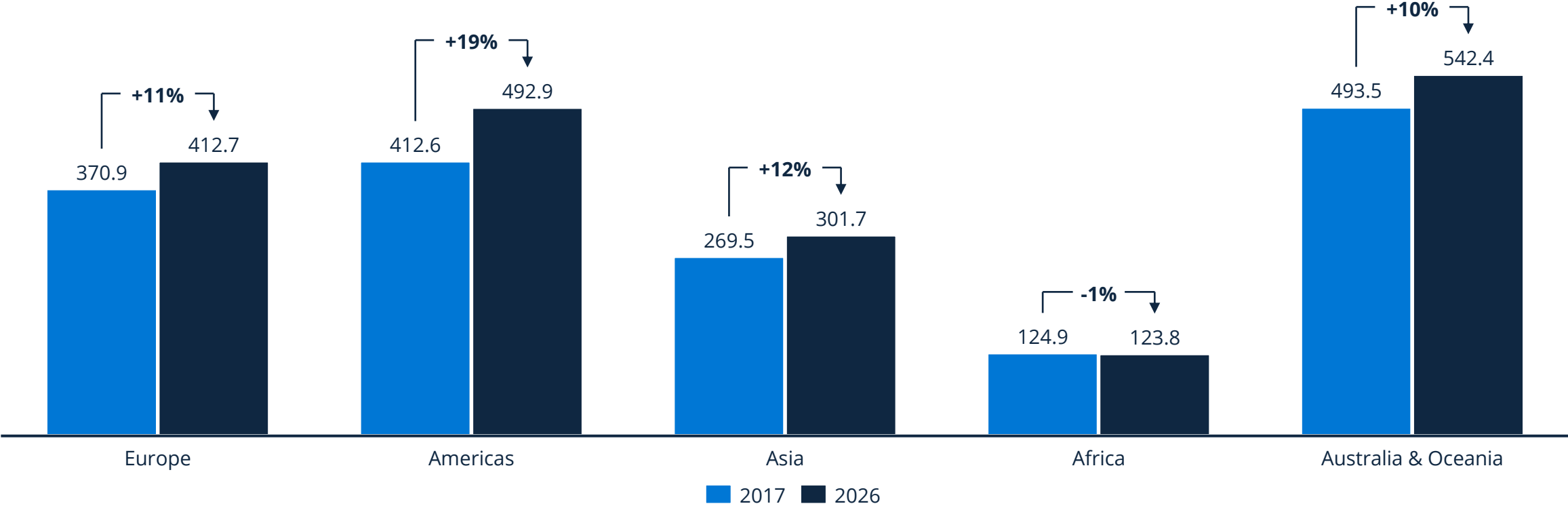
## Hotels users in millions



# Out of the five major regions, Americas users spend most on Hotels

Hotels average revenue per user: regional comparison (1/2)

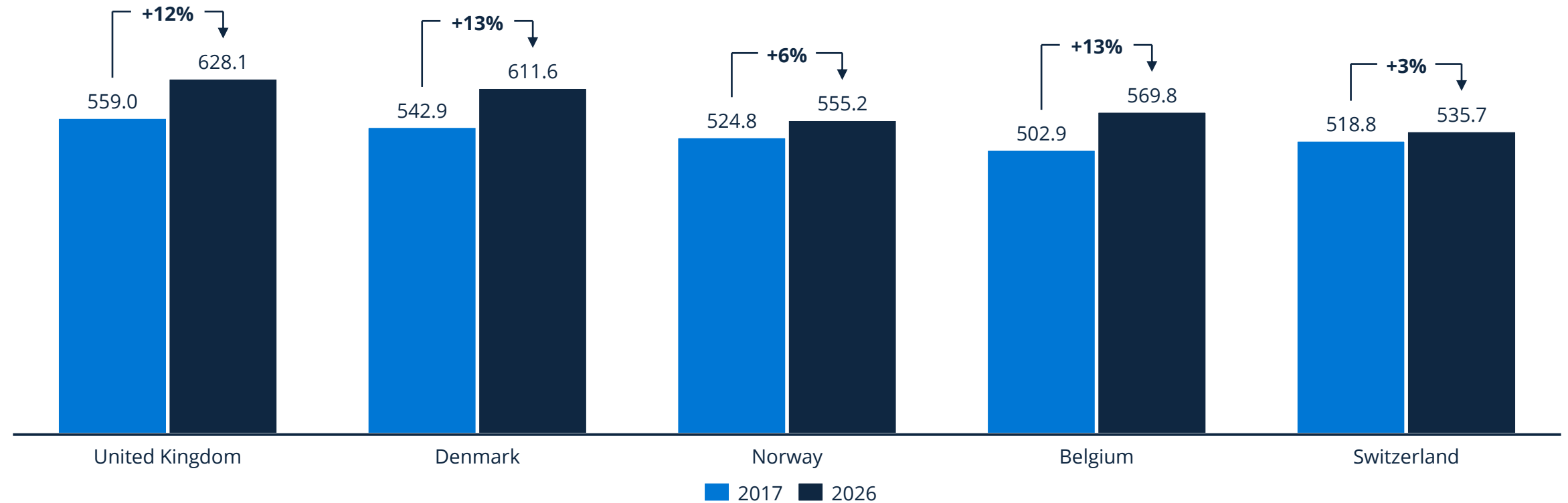
Hotels average revenue per user in US\$



# Average spendings on Hotels will increase in Europe in the future

Hotels average revenue per user: regional comparison (2/2)

## Hotels average revenue per user in US\$



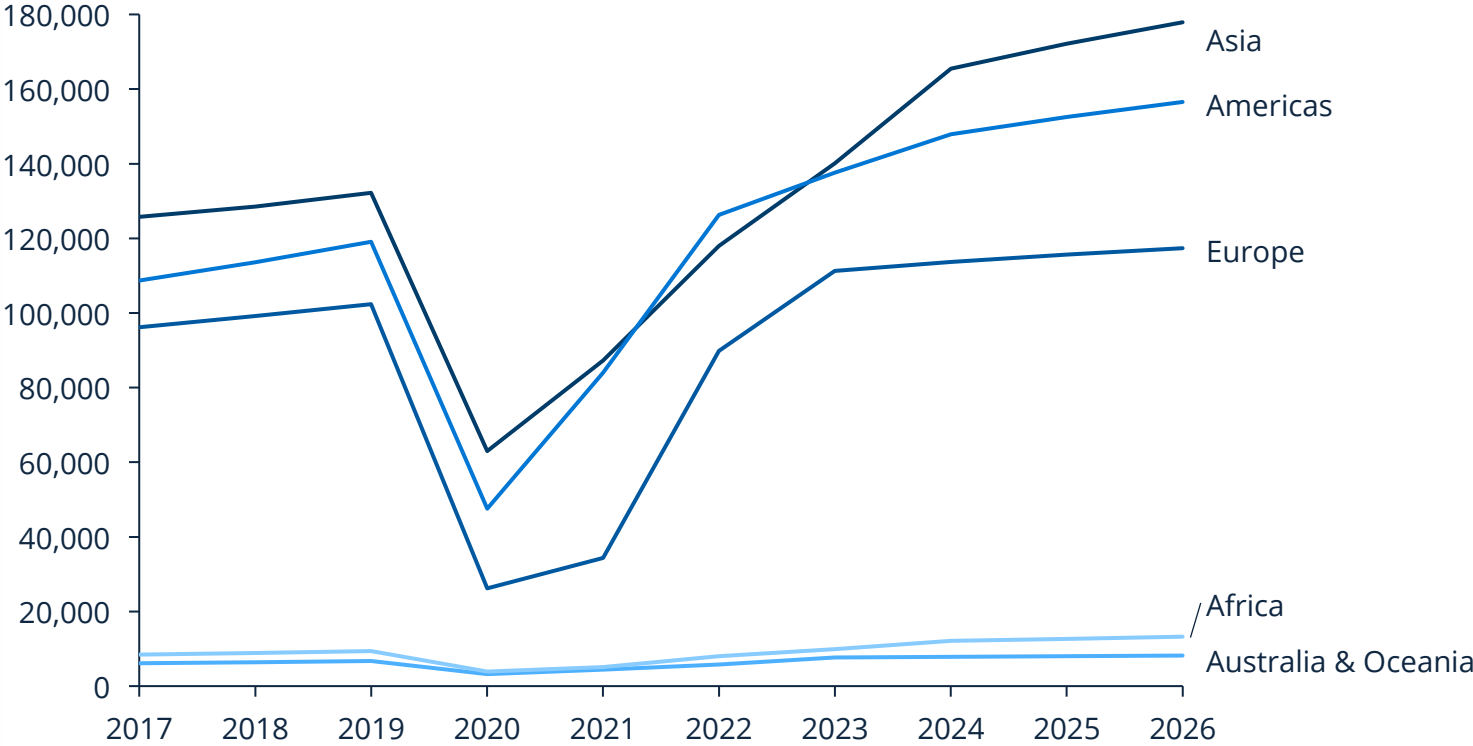
# With revenues of US\$87.23 billion, Asia is the biggest market Worldwide

Hotels market sizes: regional comparison (1/2)

## Hotels revenues in billion for regions in US\$

Worldwide, the Hotels market generated a total revenue of US\$215.2 billion in 2021, with 614.49 million users. Asia was the region with the most users in that year.

We expect the revenue aggregated from Hotels in Americas to amount to US\$156.5 billion, with over 317.6 million users, in 2026. Amongst the top three regions, Europe still has the lowest revenue amounting up to US\$34.39 billion in 2021. Until 2026 we expect the revenue to grow up to US\$117.35 billion. Asia have the highest revenue compared to the other regions, in 2021 its at US\$87.23 and we expect to increase up to US\$177.9 billion at 2026.



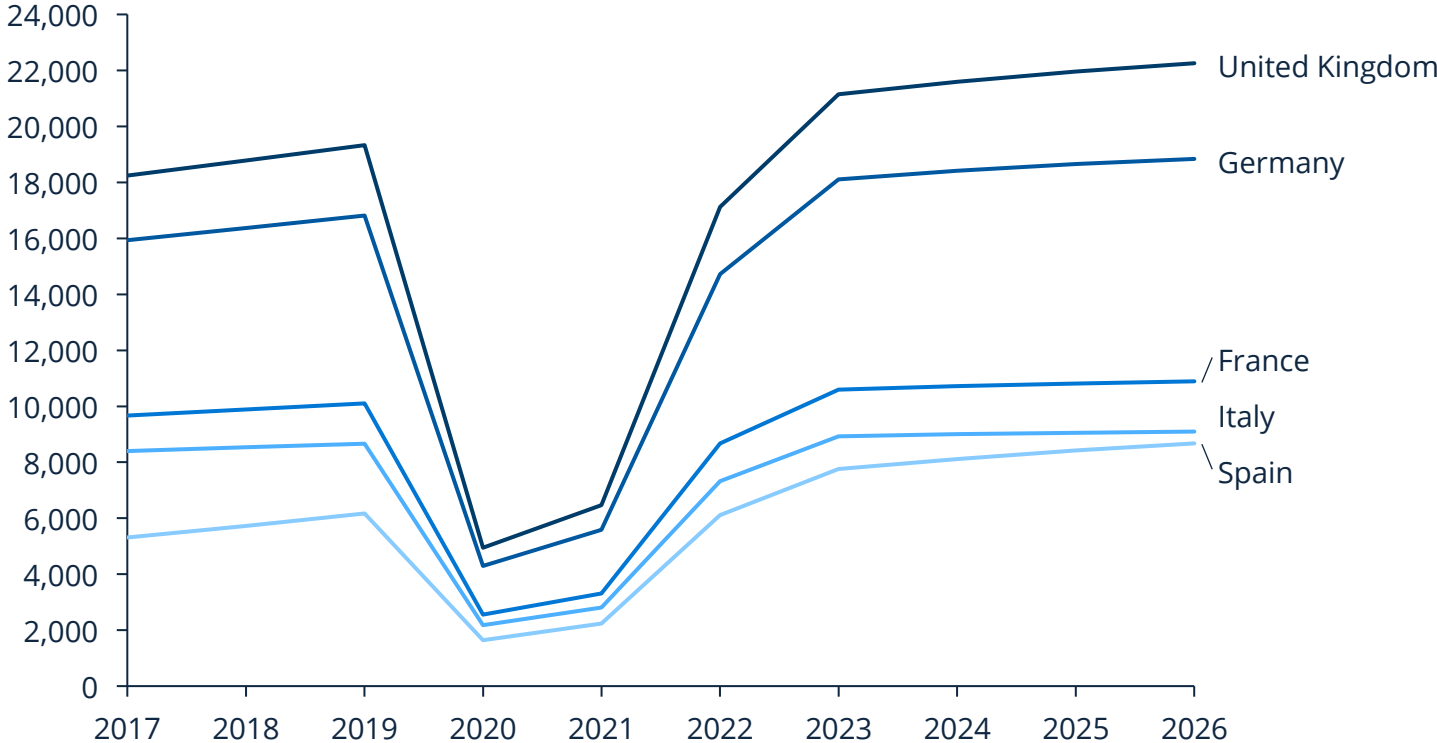
# With revenues of US\$6.47 billion, the U.K. is the biggest market among Europe's Top 5 in 2021

Hotels market sizes: regional comparison (2/2)

## Hotels revenues in million in Europe's Top 5 in US\$

In Europe, the Hotels market generated a total revenue of US\$34.39 billion in 2021, with more than 88.38 million users. The U.K. was the country with the most unit sales in that year. The five countries within Europe with the highest revenues are the U.K., Germany, France, Italy and Spain.

In 2026, the U.K. will approach at US\$22.25 billion while Germany remains at US\$18.83 billion at the same time. France, Italy and Spain will reach US\$10.88 billion, US\$9.093 billion and US\$8.67 billion respectively in 2026.



# The User penetration rate is highest in Singapore, followed by the U.S. and Canada

Hotels penetration rates: global comparison











## User penetration Worldwide

Globally, Users amounted up to 614.49 million in 2021, with a user penetration rate of 8.1%. Singapore was the country with the highest user penetration rate in that year.

We expect the user penetration rate from Hotels worldwide to be around 16.7%, with over 1,313.71 million users, in 2026.



## Penetration Rate ranking Worldwide in 2021

#	Country		Penetration Rate	Population in mn
1	Singapore		36%	5.9
2	United States		32%	332.9
3	Canada		31%	38.1
4	New Zealand		29%	4.9
5	Australia		27%	25.8
6	Israel		24%	8.8
7	Japan		22%	126.1
8	South Korea		21%	51.3
9	Switzerland		21%	8.7
10	Sweden		19%	10.2

## CHAPTER 03

# Appendix

- Recommended studies & reports
- Methodology
- Country/territory coverage
- Included models
- Product overview and authors



# The Mobility Market Outlook reports provide comprehensive data which help you derive insights

Recommended studies & reports (1/2)

## Mobility Market Outlook reports

The Mobility Market Outlook reports provide comprehensive data on markets, and in the case of Passenger Cars, top brands, for all major countries, territories and regions. All reports include market overviews which provide insights and a multitude of comparisons using key performance indicators such as revenues, average prices, unit sales and users. Some recommended studies and reports are:

- [Shared Mobility Report](#)
- [Travel & Tourism Report](#)
- [Motorcycles Report](#)
- [Medium Cars Report](#)
- [Large Cars Report](#)
- [Executive Cars Report](#)
- [Small SUVs Report](#)



# Statista dossiers provide high-quality in-depth information on important and trending topics

Recommended studies & reports (2/2)

## Statista dossiers

The Statista dossiers provide a range of interesting statistics and facts related to digital trends, industries, consumers, politics, society, countries as well as brands and companies. They include high-quality in-depth information and a multitude of comparisons using key performance indicators such as number of employees, revenue, company value, stock price, and number of registrations for different regions. Some recommended dossiers are:

- [Mobility services](#)
- [Mobility-as-a-Services \(MaaS\) worldwide](#)
- [New mobility solutions in South Korea](#)
- [Electric vehicles worldwide](#)
- [New mobility solutions in China](#)
- [COVID-19 measures and their effects on mobility behavior](#)



# In Europe, the Statista Mobility Market Outlook covers 44 countries/territories and 5 regions

Country/territory coverage (1/5)

## Full list of countries, territories and regions covered in the Statista Mobility Market Outlook

### Europe

#### Southern Europe

Albania  
Bosnia and Herzeg.  
Croatia  
Cyprus  
Greece  
Italy  
North Macedonia  
Malta  
Montenegro  
Portugal  
Serbia  
Slovenia  
Spain  
Turkey

### Eastern Europe

Armenia  
Azerbaijan  
Belarus  
Bulgaria  
Georgia  
Moldova  
Romania  
Russia  
Ukraine

### Central & Western Europe

Austria  
Belgium  
Czechia

France

Germany  
Hungary  
Ireland  
Luxembourg  
Netherlands  
Poland  
Slovakia  
Switzerland  
United Kingdom

### Northern Europe

Denmark  
Estonia  
Finland  
Iceland

Latvia

Lithuania  
Norway  
Sweden



# In the Americas, the Statista Mobility Market Outlook covers 26 countries/territories and 5 regions

Country/territory coverage (2/5)

## Full list of countries, territories and regions covered in the Statista Mobility Market Outlook

### Americas

#### South America

- Argentina
- Bolivia
- Brazil
- Chile
- Colombia
- Ecuador
- Guyana
- Paraguay
- Peru
- Suriname
- Uruguay

### Central America

- Belize
- Costa Rica
- El Salvador
- Guatemala
- Honduras
- Nicaragua
- Panama

### North America

- Canada
- Mexico
- United States

### Caribbean

- Cuba
- Dominican Republic
- Haiti
- Jamaica
- Puerto Rico



# In Asia and Australia & Oceania, the Statista Mobility Market Outlook covers 43 countries/territories and 7 regions

Country/territory coverage (3/5)

## Full list of countries, territories and regions covered in the Statista Mobility Market Outlook

<b>Asia</b>	Lebanon	Timor-Leste	Kyrgyzstan
<b>South Asia</b>	Oman	Vietnam	Tajikistan
Bangladesh	Qatar		Turkmenistan
Bhutan	Saudi Arabia		Uzbekistan
India	United Arab Emirates		
Nepal			
Pakistan	<b>Southeast Asia</b>	<b>East Asia</b>	<b>Australia &amp; Oceania</b>
Sri Lanka	Brunei Darussalam	China	Australia
	Cambodia	Hong Kong	Fiji
<b>West Asia</b>	Indonesia	Japan	New Zealand
Bahrain	Laos	Mongolia	Papua New Guinea
Iran	Malaysia	South Korea	
Iraq	Myanmar	Taiwan	
Israel	Philippines		
Jordan	Singapore	<b>Central Asia</b>	
Kuwait	Thailand	Kazakhstan	



# In Africa, the Statista Mobility Market Outlook covers 39 countries/territories and 6 regions

Country/territory coverage (4/5)

## Full list of countries, territories and regions covered in the Statista Mobility Market Outlook

- Africa**
- North Africa**
  - Algeria
  - Egypt
  - Morocco
  - Sudan
  - Tunisia
- Central Africa**
  - Angola
  - Cameroon
  - Chad
  - Equatorial Guinea
  - Gabon
  - Republic of the Congo
- West Africa**
  - Benin
  - Burkina Faso
  - Gambia
  - Ghana
  - Guinea
  - Ivory Coast
  - Niger
  - Nigeria
  - Senegal
  - Sierra Leone
  - Togo
- Southern Africa**
  - Botswana
  - Lesotho
- Mauritius
- Namibia
- South Africa
- East Africa**
  - Burundi
  - Ethiopia
  - Kenya
  - Madagascar
  - Malawi
  - Mozambique
  - Rwanda
  - Seychelles
  - Tanzania
  - Uganda
  - Zambia
- Zimbabwe



# Author



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Christian Matheisl studied Economics at the University of Bremen (B.Sc.) and the HHU Düsseldorf (M. Sc.). Before joining Statista, he worked as a research assistant at a public institution. At Statista he works at projects related to mobility markets.

## MOBILITY MARKET OUTLOOK

# Everything you need to know about the **future of mobility**

The Mobility Market Outlook combines key mobility topics and provides relevant figures and forecasts about the automotive market and mobility services on a global scale. We analyze, measure, and predict market behavior and share the results with you.

- Mobility-related market insights, forecasts, and indicators
- Passenger cars in 12 car classes, 140+ makes, and 150+ countries and territories as well as 37 regions
- Insights into electric mobility and motorcycles
- 9 markets about Travel and Tourism and in-depth data on tourism

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Find out more on:  
[statista.com/outlook/mobility-markets](https://www.statista.com/outlook/mobility-markets)

