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Europe’s Accommodation Demand Could Rise 32% by 2036

Tourism Economics projects more than 1.6 billion extra annual overnight stays, with international travel outpacing domestic demand

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European demand for tourist accommodations could rise 32% between 2026 and 2036, adding more than 1.6 billion overnight stays a year by the end of the period compared with 2026, according to a Tourism Economics forecast cited in an Accor statement published Monday, Nov. 2, by the industry outlet TendanceHotellerie.

The projection covers 47 European countries and describes a future scenario rather than growth that has already taken place. The forecasts were prepared in June 2026, according to the publication, and point to sustained expansion in travel demand over the next decade, with international tourism expected to outpace domestic travel.

The study says international overnight stays across Europe would increase 42% over the 2026-2036 period, compared with 24% for domestic overnight stays. That would leave international travel growing 18 percentage points faster than domestic demand. By 2036, the international segment alone would account for about 1 billion of the additional annual overnight stays expected across the region.

The figures suggest that much of Europe’s lodging growth over the next decade would come from travelers crossing borders rather than residents traveling within their own countries. That shift would have implications for hotel operators, airlines, tourism boards and infrastructure planners, particularly in markets seeking to capture long-haul and intra-European demand.

The forecast also points to stronger-than-average increases in parts of Central and Eastern Europe and in the Balkans, indicating that growth may not be concentrated only in the region’s largest or most established tourism markets. If that pattern holds, destinations that have traditionally attracted a smaller share of European travel could face rising pressure to expand room supply, transport links and tourism services.

Because the projection measures accommodation demand through overnight stays, it offers a broad view of the pressure that future travel could place on the region’s lodging capacity. More than 1.6 billion additional annual nights by 2036 would represent a major increase in the volume of guests needing hotel rooms and other paid accommodations each year. For operators and investors, that could translate into decisions on new construction, renovations, staffing and pricing. For governments and local authorities, it could affect transport planning, labor needs and environmental management in high-traffic areas.

The study’s emphasis on international demand is especially important for cities and resort areas that rely heavily on air service and cross-border travel. Markets with strong airline connectivity, major rail links or easier visa access could be better placed to

capture a larger share of the expected increase. At the same time, the forecast underscores the exposure of those same markets to changes in economic conditions, fuel costs, exchange rates and aviation capacity.

The source material makes clear that the numbers are projections, not a statistical update for November 2026. They are based on assumptions available in June 2026 and remain subject to change as economic growth, household spending, geopolitics and transportation networks evolve. That means the 32% increase should be read as an outlook for where accommodation demand could go under the scenario modeled by Tourism Economics, rather than as a fixed outcome.

Even so, the scale of the estimate is notable. Europe is already one of the world's largest tourism markets, and the addition of more than 1.6 billion yearly overnight stays would imply a substantial rise in traveler flows across hotels, resorts, serviced apartments and other lodging categories. The forecast also suggests that the mix of guests may change, with a larger share coming from foreign source markets over time.

For major hotel groups, the findings could reinforce strategies focused on adding rooms in faster-growing destinations and on expanding brands aimed at international travelers. For smaller operators and independent hotels, the report points to both opportunity and risk: stronger demand could lift occupancy, but only if properties can keep pace with changing traveler expectations and rising competition.

The projection arrives at a time when the European travel industry is closely watching how demand recovers and shifts after several years of disruption and uneven market performance. By highlighting faster growth in international nights and stronger momentum in emerging parts of the continent, the forecast offers a snapshot of where the industry believes future pressure points and growth markets may lie.

Accor's statement, as reproduced by TendanceHotellerie on Monday, Nov. 2, framed the study as a way to examine future lodging capacity needs and changes in tourism source markets. That makes the forecast relevant not only to hotel owners and travel companies, but also to policymakers weighing how to manage growth if demand expands at the pace the June 2026 model anticipates.