Bed And Breakfast Accommodation Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Hotels, Accommodation & Resorts (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/bed-and-breakfast-accommodation-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 33.75 billion
Projected Forecast (2031)	USD 33.75 billion
Growth Rate (CAGR)	4.95 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Bed And Breakfast Accommodation industry](images/chart_2.png)

![Bed And Breakfast Accommodation Market (2025 - 2030)](images/chart_3.png)

![Bed and Breakfast Accommodation Market: Market Share By Accommodation Type, 2025](images/chart_4.png)

![Bed and Breakfast Accommodation Market: Market Share By Traveler Type, 2025](images/chart_5.png)

![Bed and Breakfast Accommodation Market: Market Shrare By Price Point, 2025](images/chart_6.png)

![Bed and Breakfast Accommodation Market](images/chart_7.png)

![Bed And Breakfast Accommodation Market Concentration](images/chart_8.png)

![Icon](images/chart_9.png)

![footer background image](images/chart_11.png)

![Mordor Intelligence on Facebook](images/chart_13.svg)

![Mordor Intelligence on Pinterest](images/chart_15.svg)

![Mordor Intelligence on Instagram](images/chart_16.svg)

![ESOMAR](images/chart_18.png)

![GPTW](images/chart_20.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 33.75 Billion |
Market Size (2031) | USD 42.99 Billion |
Growth Rate (2026 - 2031) | 4.95 % |
Fastest Growing Market | Asia Pacific |

Largest Market | North America |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Bed And Breakfast Accommodation Market Analysis by Mordor IntelligenceThe bed and breakfast market size was valued at USD 32.16 billion in 2025 and estimated to grow from USD 33.75 billion in 2026 to reach USD 42.99 billion by 2031, at a CAGR of 4.95% during the forecast period (2026-2031). A decisive shift toward authentic, small-scale lodging, coupled with digital booking innovations, shapes this expansion. Rural properties continue to capture growing domestic tourism flows, while boutique and heritage inns outperform generic lodging by leaning into experiential travel. Technology-enabled distribution platforms have reduced entry barriers for independent operators yet tightening short-term rental rules in urban centers underscore the need for agile compliance strategies. Ongoing labor shortages and climate-linked insurance costs remain the principal headwinds.

Key Report Takeaways* By accommodation type, boutique and heritage inns led with 31.62% revenue of the bed and breakfast accommodation market share in 2025.
* By location setting, rural properties accounted for 42.98% of the bed and breakfast accommodation market share in 2025.
* By price point, the mid-scale segment contributed 48.94% of the bed and breakfast accommodation market size in 2025; luxury is projected to rise at 6.88% CAGR to 2031.
* By geography, North America held 43.15% of the bed and breakfast accommodation market share in 2025, whereas Asia-Pacific posts the fastest regional CAGR at 8.45% through 2031.
* The bed and breakfast market exhibits high fragmentation with the top 5 players, Airbnb, B&B HOTELS Group, OYO Hotels & Homes, Select Registry Distinguished Inns, and The Inn Collection Group, collectively holding modest market share in 2025.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Bed And Breakfast Accommodation Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
Growing demand for personalized experiential travel | +1.2% | Global, with premium impact in North America & Europe | Medium term (2-4 years) |
Rapid expansion of online booking and OTA ecosystems | +0.9% | Global, accelerated in Asia-Pacific markets | Short term (≤ 2 years) |
Surge in domestic short-stay tourism post-pandemic | +0.8% | North America, Europe, India core markets | Short term (≤ 2 years) |
Rising disposable incomes of Millennials and Boomers | +0.7% | North America, Europe, emerging APAC markets | Long term (≥ 4 years) |
Hybrid "work-cation" B&B packages for remote workers | +0.4% | North America, Europe, select urban-adjacent rural areas | Medium term (2-4 years) |
Rural sustainability grants fueling community B&Bs | +0.2% | Europe, North America, Australia regional focus | Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The sector is markedly fragmented; Airbnb, B&B HOTELS Group, OYO Hotels & Homes, Select Registry Distinguished Inns, and The Inn Collection Group jointly contro l only a small slice of global revenues. Such diffusion allows nimble independents to thrive by highlighting uniqueness rather than brand uniformity. Technology has leveled the playing field, enabling single-property hosts to access channel managers, dynamic pricing, and AI-driven marketing once reserved for large chains.

Strategic thrusts center on portfolio diversification and digital direct-to-consumer funnels. OYO's USD 525 million purchase of G6 Hospitality widened its economy footprint while Marriott's USD 355 million CitizenM acquisition diversified its lifestyle offering [3]Source: Marriott International, "Marriott to Acquire CitizenM," marriott.com. . Airbnb's 2025 platform revamps now bundles services like catering and personal coaching, extending its customer lifetime value beyond lodging. Meanwhile, regional collectives leverage shared procurements to cut linen, amenity, and insurance costs.

High-growth adjacencies include work-cation-centric clusters, sustainability-certified farm stays, and blockchain-enabled loyalty exchanges. Mergers among third-party management groups, such as Pyramid Global's tie-up with Axiom Hospitality, illustrate the race to scale operational synergies. Looking forward to data-rich revenue management, embedded fintech for trip financing, and dynamic packaging APIs from suppliers like Expedia will further reshape competitive contours.

Bed And Breakfast Accommodation Industry Leaders* Airbnb, Inc.

* B&B HOTELS Group

* OYO Hotels & Homes

* Select Registry Distinguished Inns

* The Inn Collection Group

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

This market covers revenue earned from paid overnight stays at bed-and-breakfast properties where breakfast is included in the room rate and is prepared and served on-site, across the study geographies and time period. We treat this spend as the guest-facing accommodation revenue tied to these stays.

Scope exclusions: Excludes whole-home vacation rentals, hostels, and large boutique hotels even if they offer breakfast.

Segmentation Container

* By Accommodation Type* Luxury BandBs
* Boutique / Heritage Inns
* Farm-stay and Agri-tourism BandBs
* Budget / Economy BandBs

* By Price Point* Luxury
* Mid-scale
* Economy

* By Traveller Type* Leisure
* Business
* Bleisure / Work-cation
* Solo

* By Booking Channel* Online Travel Agencies (OTAs)

* Direct Website / Mobile
* Offline Travel Agents

* By Location Setting* Urban
* Suburban
* Rural
* Coastal / Island
* Heritage / Historic Towns

* By Ownership Model* Independent
* Franchise / Affiliated
* Cooperative / Consortium

* By Geography* North America* Canada
* United States
* Mexico

* South America* Brazil
* Peru
* Chile
* Argentina
* Rest of South America

* Asia-Pacific* India
* China
* Japan
* Australia
* South Korea
* South East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines)
* Rest of Asia-Pacific

* Europe* United Kingdom
* Germany
* France
* Spain
* Italy
* BENELUX (Belgium, Netherlands, Luxembourg)
* NORDICS (Denmark, Finland, Iceland, Norway, Sweden)
* Rest of Europe

* Middle East and Africa* United Arab Emirates
* Saudi Arabia
* South Africa
* Nigeria
* Rest of Middle East and Africa

Frequently Asked Questions

What is the current size of the global bed and breakfast market?

The market reached USD 33.75 billion in 2026 and is forecast to grow to USD 42.99 billion by 2031.

Which region is expanding the fastest in the bed and breakfast market?

Asia-Pacific posts the quickest growth, registering an 8.45% CAGR through 2031, driven by rising domestic travel in India and gradual reopening in China.

Which accommodation type holds the largest share?

Boutique and heritage inns lead the segment with 31.62% revenue share, owing to traveler demand for authentic, culturally immersive stays.

How are booking channels changing for B&B operators?

Online travel agencies still dominate but direct website bookings are rising at 12.3% CAGR, helped by mobile apps and lower acquisition costs.

What regulatory challenges face the sector?

Urban zoning limits and principal-residence rules in markets such as British Columbia and Scotland impose compliance costs and restrict new urban inventory.