Online Accommodation Booking Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

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

Executive Market Summary

Market Metric	Details
Base Market Size	USD 361.54 billion
Projected Forecast (2031)	USD 361.54 billion
Growth Rate (CAGR)	6.05 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Online Accommodation Booking industry](images/chart_2.png)

![Online Accommodation Booking Market (2025 - 2030)](images/chart_3.png)

![Online Accommodation Booking Market: Market Share by Platform, 2025](images/chart_4.png)

![Online Accommodation Booking Market: Market Share by Property Type, 2025](images/chart_5.png)

![undefined_Market_concentration_2(1).png](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

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

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.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 361.54 Billion |
Market Size (2031) | USD 484.95 Billion |
Growth Rate (2026 - 2031) | 6.05 % |
Fastest Growing Market | Asia Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Online Accommodation Booking Market Analysis by Mordor IntelligenceThe online accommodation booking market size was valued at USD 340.92 billion in 2025 and estimated to grow from USD 361.54 billion in 2026 to reach USD 484.95 billion by 2031, at a CAGR of 6.05% during the forecast period (2026-2031). This expansion illustrates the sector’s ability to adapt to changing traveler behavior that increasingly favors real-time booking and friction-free digital journeys. Rising smartphone penetration, faster mobile networks, and intuitive interfaces are moving bookings away from desktops and toward mobile-first experiences that reduce search time and improve conversion rates. Operators are matching this shift with AI-driven personalization tools that analyze browsing history, trip intent, and contextual signals to surface relevant properties faster than manual filters can. Competitive intensity is prompting major platforms to build proprietary models that recommend entire itineraries instead of only listing rooms, thereby elevating the perceived value of an integrated trip planner. Simultaneously, supply-side partners are adopting dynamic pricing engines that synchronize with these AI systems to protect margins while keeping inventory visible across multiple channels.

Key Report Takeaways* - By platform, mobile applications held 61.45% of the online accommodation booking market share in 2025, and their share is projected to widen as the segment advances at a 12.65% CAGR through 2031.
* - By mode of booking, third-party OTAs controlled 71.60% of the online accommodation booking market share 2025, whereas direct portals are on track to record a 12.2% CAGR to 2031.
* - By property type, hotels and resorts captured 49.02% of the online accommodation booking market size in 2025, while alternative lodgings are accelerating at a 14.9% CAGR during the forecast period.
* - By geography, Europe accounted for 33.05% of the online accommodation booking market share in 2025; Asia-Pacific is expanding at a 12.1% CAGR, making it the fastest-growing region.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Online Accommodation Booking Market*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising mobile internet penetration	+2.1%	Global, strongest in Asia-Pacific and Middle East & Africa	Medium term (2–4 years)
Growing millennial and Gen-Z travel spend	+1.8%	North America and Europe first, Asia-Pacific catching up	Long term (≥ 4 years)
Expansion of low-cost carriers boosting short-haul trips	+1.4%	Asia-Pacific core, spill-over to South America	Short term (≤ 2 years)
AI-powered hyper-personalized search and recommendation engines	+1.2%	North America and Europe lead, Asia-Pacific adoption rising	Medium term (2–4 years)
ESG-driven preference for certified sustainable stays	+1.0%	Europe leads, growing traction in North America and Oceania	Long term (≥ 4 years)
AI-powered hyper-personalized search and recommendation engines	+1.2%	North America and Europe lead, Asia-Pacific adoption rising	Medium term (2–4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The online accommodation booking market is characterized by an oligopolistic str ucture, led by a few dominant players. Booking Holdings, Expedia Group, and Airbnb together command a majority share of the market, highlighting their significant influence. These major platforms benefit from scale advantages that enable them to negotiate better payment processing terms, secure premium advertising placements, and attract top AI talent, further reinforcing their leadership. Trip.com Group and Agoda complete the top five, leveraging strong regional presence and effective language localization to maintain competitiveness in the Asia-Pacific region against global giants. Competitive strategies focus on proprietary AI engines that shorten booking paths, anticipate ancillary purchases, and personalize in-stay services such as upgrades and late checkout offers. Strategic differentiation also appears in content formats, with short-form video and immersive imagery becoming pivotal in inspiring undecided travelers at the dreaming stage. Outsized marketing budgets enable extensive A/B testing that small platforms cannot match, further widening innovation gaps.

To fortify customer lock-in, Booking Holdings integrates attraction tickets and intercity rail passes, while Expedia Group expands B2B APIs that place its inventory inside bank apps and workplace travel platforms. Airbnb pursues professionalization, vetting hosts through Project Lighthouse to elevate quality and consistency, thereby courting business travelers formerly exclusive to hotels. Regional champions like Yanolja in South Korea invest in cloud-based property-management software that embeds inventory directly into consumer apps, fostering an ecosystem loop. Private-equity interest remains high, evidenced by funding rounds in vertical-specific platforms that cater to campgrounds or luxury villas, although exit timelines may hinge on regulatory clarity and acquisition appetite from the top five. Overall, sustained R&D spending and M&A firepower among leading players set a high bar for insurgents seeking relevance in a concentrated arena.

Competitive threats stem from super-apps, search engine feature encroachment, and voice-assistants that could disintermediate traditional booking flows by pushing recommendations directly to users without visible interfaces. Market leaders hedge by signing distribution agreements with smart-speaker manufacturers and embedding widgets into car dashboards that present lodging options en route. Data-privacy legislation such as the Digital Markets Act imposes new consent management obligations but also restricts gatekeeper platforms, potentially reducing ad-tech dominance and opening niches for specialized OTAs[3]Source: Zacks Equity Research, “Expedia Group Aids Travelers & Partners With New Releases,” nasdaq.com. Meanwhile, sustainability credentials and carbon-emission calculators emerge as differentiators as corporate travel managers impose ESG reporting on preferred suppliers. Platforms quick to surface eco-labels and verified sustainability scores may win share among procurement officers and climate-conscious consumers alike. In sum, the competitive landscape evolves through a blend of technological innovation, regulatory response, and shifting traveler priorities that favor agile, well-capitalized operators.

Online Accommodation Booking Industry Leaders* Expedia Group Inc.

* Booking Holdings Inc.

* Airbnb Inc.

* Trip.com Group Ltd.

* Agoda Company Pte. Ltd.

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Online Accommodation Booking Market Report ScopeA complete background analysis of the Global Online Accommodation Booking Market, which includes an asses sment of the national accounts, economy, and emerging market trends by segments, significant changes in the market dynamics, and market overview is covered in the report.

By PlatformMobile Application |
Website |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
South America | Brazil |
| Peru |
| Chile |
| Argentina |
| Rest of South America |
Europe | United Kingdom |
| Germany |
| France |
| Spain |
| Italy |
| BENELUX (Belgium, Netherlands, Luxembourg) |
| NORDICS (Denmark, Finland, Iceland, Norway, Sweden) |
| Rest of Europe |
Asia-Pacific | India |
| China |
| Japan |
| Australia |
| South Korea |
| South-East Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, Philippines) |
| Rest of Asia-Pacific |
Middle East and Africa | United Arab Emirates |
| Saudi Arabia |
| South Africa |
| Nigeria |
| Rest of Middle East and Africa |

Frequently Asked Questions

How large is the online accommodation market today?

The online accommodation market size is USD 361.54 billion in 2026 and is projected to reach USD 484.95 billion by 2031.

Which booking channel is growing fastest in digital lodging?

Mobile applications are advancing at a 12.65% CAGR through 2031, making them the fastest-expanding platform.

What is driving Asia-Pacific’s rapid growth in digital accommodation?

Rising middle-class income, low-cost carrier expansion, and mobile payment adoption are propelling a 12.1% CAGR in the region.

Why are alternative lodgings gaining traction among travelers?

Experience-seeking guests favor unique stays such as glamping and farm-stays, pushing alternative lodging to a 14.9% CAGR.