

TRAVEL HORIZONS 2024

key trends & predictions

lastminute.com



INTRO

Predicting travel intent used to be relatively straightforward, but three years of global upheaval has meant the trusty YOY data predictions had to go out the window. Travelling became more unpredictable, and as a consequence so did traveller behaviour.

Harnessing decades of in-house specialist knowledge to interpret 1st party data means our specially created in-house Travel Intelligence Unit (TIU) is perfectly placed to identify travel trends and shifts in audience behaviour.

We've analysed booking patterns and search intent in five of Europe's biggest markets, the UK, France, Germany, Spain and Italy

For 2024 two clear types have evolved; The Proactive Planners and the Spontaneous Seekers. This has seen the traditional booking windows and seasonality lengthened, meaning while calendar key peaks still remain, school holidays and Easter for example, summer holidays are now running into September and even October - what we call the SummerStretch.

We're predicting the cost of travel to stabilise in 2024 after a rise in 2023 mainly due to huge pent-up demand and a holiday focus to return to much-loved destinations, a travel psychological need akin to "going home".

So we are going to reveal how travel got a lot more last minute, where the hottest destinations you need to be thinking about right now are, how the social impact of travel can be mitigated with some flexibility and finally some fun where we show you how the search patterns of 2023 will effect where we go in 2024.

A QUOTE FROM OUR CEO

Trying to predict when, how and where people want to go is something the travel industry has been doing for 180 years since the first-ever package holiday was sold. While there might only have been a handful of destinations back then, now there are literally limitless combinations of flights and hotels to choose from. Our expertise as one of the first online travel agents means we've combined the findings of our data scientists and in-house experts to bring the key stories from across Europe we believe will define 2024.

Summer 2023 has been deemed the official recovery of travel post-pandemic, despite inflation, travel disruptions at airports and extreme weather events. The resilience of travellers and our industry is something to be proud of. But while we enter a new phase of booking intent, some trends from the last few years are here to stay like flexibility and booking protection.

For 2024, I'm excited to see which new destinations will start to challenge the traditional big hitters, from not only a price point of view but for a need to travel more responsibly and take the path less trodden. Given our company name, I'm delighted to see much more spontaneity in what has been historically a seasonality-driven industry.

We've seen a lot of changes in the last 25 years, but you don't need a crystal ball to see that the next 25 years in travel could be the most satisfying yet for all our customers.

Luca Concione
CEO of *lastminute.com*

“

I'm excited to see which new destinations will start to challenge the traditional big hitters

”



A person is walking away from the camera on a paved walkway. They are wearing a brown jacket over a white shirt and light-colored trousers. They have a brown leather backpack with a yellow and black patterned charm hanging from it. They are pulling a bright pink rolling suitcase with their right hand. In their left hand, they are holding a blue folder or tablet. The background shows a modern building with a large, white, conical structure and a railing. The sky is overcast.

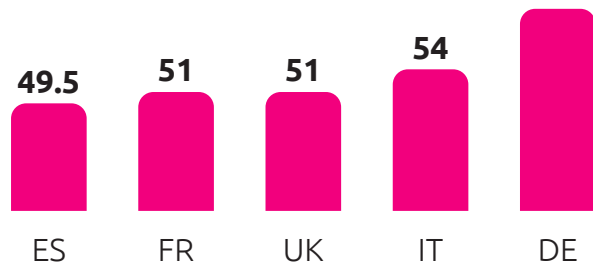
IT'S A BIT
LASTMINUTE.COM,
BUT...

WHAT IS THE MOST SPONTANEOUS COUNTRY?

In general, Europeans have a tendency to plan their trips well in advance, often securing reservations at least 7 weeks prior to their departure. Notably, the Spanish stand out for their spontaneous approach, favouring last-minute bookings in pursuit of cost-effective deals. And cliches can be true; Germans showcase a proactive planning style, typically reserving their trips approximately two months ahead of time.

Our Spontaneous (Sun) Seekers can't get enough of Majorca - the ultimate last minute holiday. It's the German's go to, along with the French and if even the locals head there (Spain), it's got to be a good choice. Italians favoured the charms of Sharm putting the Spanish island in second, where as Brits popped in at number 4 - with the closeness of Amsterdam making it their go to "just jump on a plane" place.

Days in advance Europeans book on average: **62**



WHAT ARE THE MOST SPONTANEOUS DESTINATIONS?*

*trips booked and taken within 0-7 days

IT
2023

1- Sharm El Sheikh

- 2 - Majorca
- 3 - Sicily
- 4 - Barcelona
- 5 - Sardinia



Egypt is back with a bang in Italians' summer dreams. In 2023, the number of Italian travellers who chose it for their most spontaneous trips boomed. The much-loved Sicily and Sardinia remain among the favourites.

DE
2023

1- Majorca

- 2- Turkish Riviera
- 3- Hurghada
- 4- Crete
- 5- Barcelona



Last-minute travel for Germans means only one thing: reaching the sea. And the crystal clear waters of Spain, Greece, Turkey and Egypt are their absolute favourites.

ES
2023

1- Majorca

- 2- Tenerife
- 3- Lanzarote
- 4- Gran Canaria
- 5- Menorca



For Spanish people, travelling last-minute means stay-cation on the beach: the five most popular destinations for their "spontaneous holiday" are all Spanish islands.

FR
2023

1- Majorca

- 2- Marrakech
- 3- Crete
- 4- Rome
- 5- Barcelona



When the French travel last-minute, they tend to divide into two groups: those who prefer sea and beach destinations and those who lean towards cities, history, and art.

UK
2023

1- Amsterdam

- 2- London
- 3- Barcelona
- 4- Majorca
- 5- Paris



For Brits, booking at the last minute is synonymous with a city break. Almost all the most spontaneous destinations are vibrant European cities.

LAST MINUTE ESCAPISM

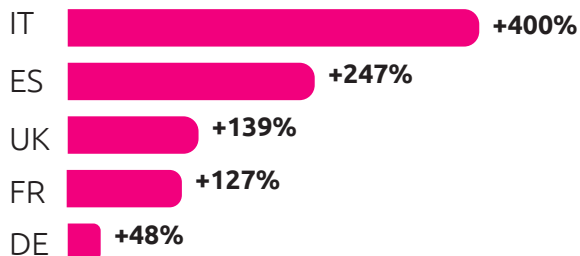
Travel Intent

European interest toward last-minute holidays is rapidly on the rise. Even the Germans, the champion Proactive Planners became more last minute as the year went on.

Italians, typical proactive travellers and tending to schedule their trips much in advance, saw the biggest leap in looking for spontaneous holidays, but this was more a dream than a reality with actual last minute bookings decreasing. Spain and the UK also saw a surge in last-minute travel searches.

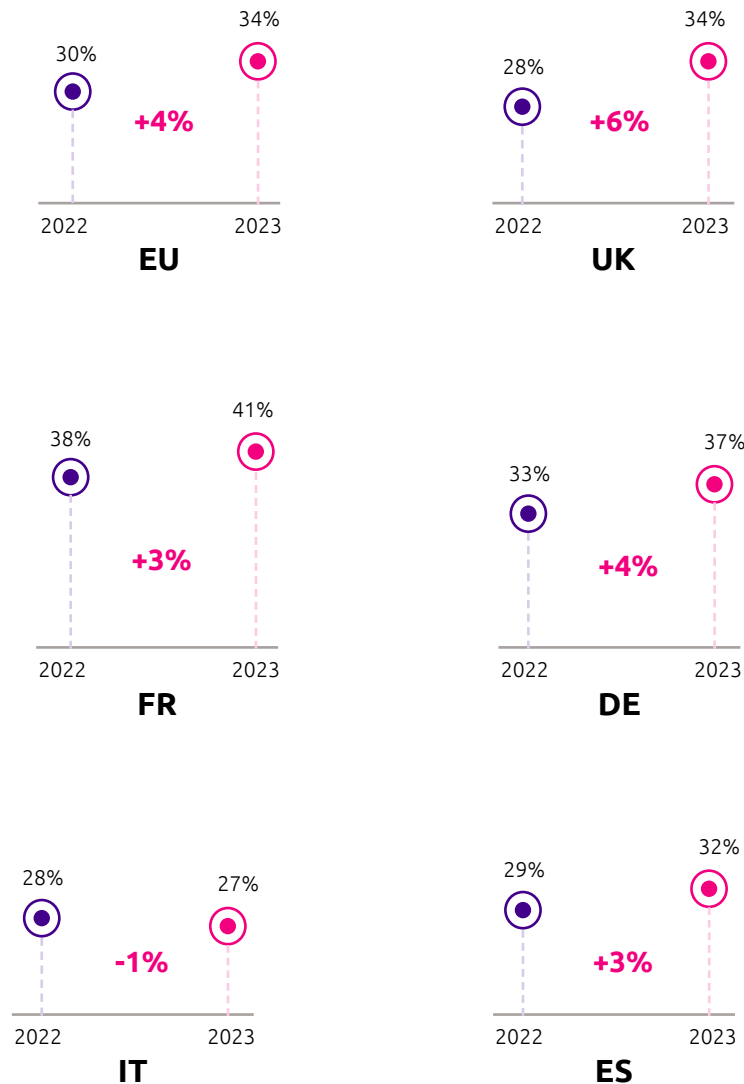
We predict Spontaneous Seekers will continue to rise as a group in 2024, as the supply and demand pricing strategies ebb and flow. The weather is always a leader factor, with Brits searches spiking in July - the wettest for a decade - and for the Italians in August - one of the hottest.

Volume of researches vs 2022



Actual bookings

In general, bookings made from 1 day to 1-2 weeks in advance compared to last year are growing across all markets - with the only exception of Italy - and now hold quite an important share of total bookings.



THE EUROPEAN SUMMER

IN A NUTSHELL

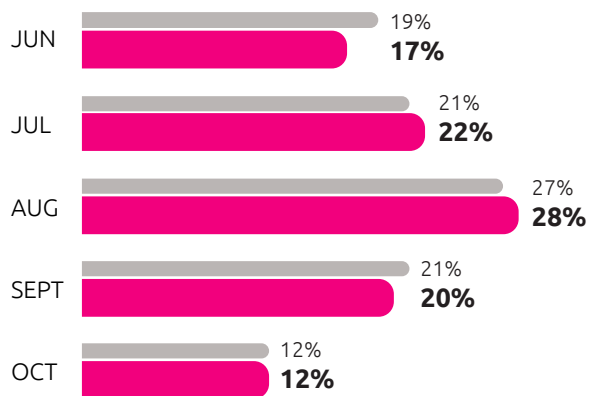
August remains the true king of European holidays.

But the late summer segment - September and October - could be considered the Crown Prince or Princess - as they also occupy an important slice of summer bookings.

If you're a Proactive Planner, you probably had your summer escape marked on the calendar since early spring. But for more spontaneous travellers, it's a waiting game for those last-minute deals to drop.

Yearly volume of bookings split by month

2022 2023



In **June**, most people booking are eyeing June, July, and August. Only 14% aim for September/October.

Booking month	Departure month				
	Jun	Jul	Aug	Sept	Oct
JUNE					
2022	27%	37%	23%	9%	4%
2023	25%	38%	24%	10%	4%

August is the main month of last-minute decisions: 48% of bookings are like, 'Hey, let's jet off ASAP!'

Booking month	Departure month				
	Jun	Jul	Aug	Sept	Oct
JULY					
2022	-	30%	45%	18%	7%
2023	-	34%	44%	16%	6%
AUGUST					
2022	-	-	43%	41%	16%
2023	-	-	48%	38%	15%

September's the sweet spot for deal hunters. People are looking for good bargains, avoiding the crowds, making September and October the perfect playground for late summer vibes.

Booking month	Departure month				
	Jun	Jul	Aug	Sept	Oct
SEPTEMBER					
2022	1%	-	-	47%	51%
2023	-	-	-	48%	52%

December deals! In Germany where pre-booking for summer peaks has always been a way of life, some of the usual January decisions have shifted to pre-Christmas and even early December - now that's planning ahead.

While City Breaks have long been the go-to last-minute choice, brief escapes to Greece, Spain, and Turkey (2-3 days) are gaining popularity.

THE TRAVELER'S DILEMMA:

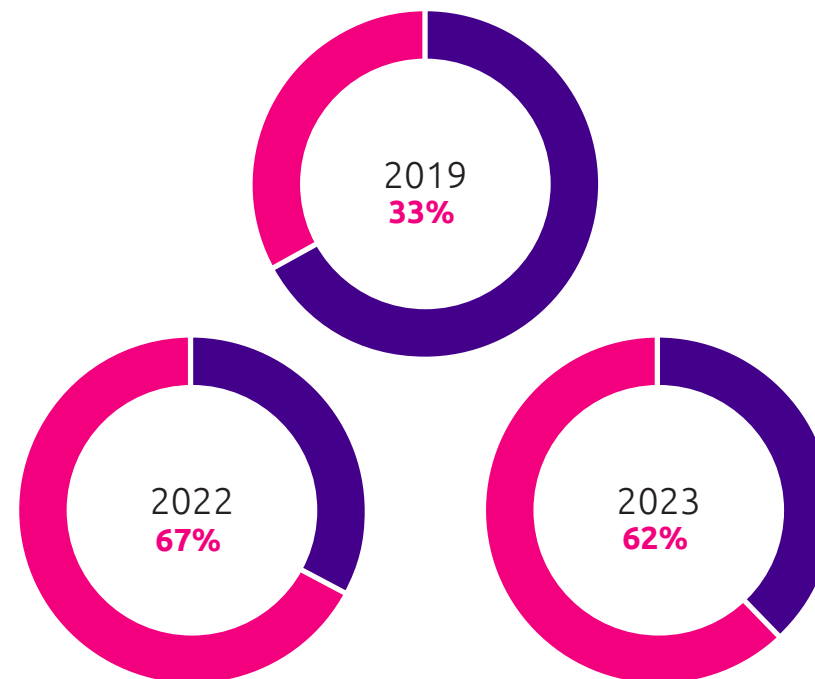
RISING DEMAND FOR PROTECTION CLASHES WITH INFLATIONARY COSTS

Before the pandemic, most travellers (67% in 2019) were willing to take the risk of booking a non-refundable trip if that meant saving a few pennies.

In the past few years, the scenario had changed: in 2022 the number of travellers booking refundable holidays to be granted more protection and flexibility in case any kind of disruption happened rose by more than 50%.

Yearly split by refundable and non-refundable rates

- Refundable Rates
- Not refundable Rates



2023 Rates split by month

	Refundable	Not Refundable
January	64%	36%
February	65%	35%
March	66%	34%
April	62%	38%
May	63%	37%
June	62%	38%
July	59%	41%
August	56%	44%
September	58%	42%

But this year something even more remarkable is happening: travellers seem to be more keen to pick non-refundable holidays compared to last year, and this trend is steadily growing month by month, hitting 42% in September.

Basically, people would love to book safer and more flexible travel options, but that needs to be offset by price.

So instead of giving up on travel, they're just crossing their fingers and letting go of some flexibility.

WILL “PEAK SEASONS” BECOME A THING OF THE PAST?

lastminute.com’s media arm Forward collaborates daily with Tourist Boards around the world, assisting them in destination promotion.

This grants us exclusive, insider perspectives on the current happenings in the travel industry. How destinations market their attractions to travellers gives us some early insight and there seemed to be **some shifts in the advertising strategies within EU countries.**

Across major European countries, a notable trend among Tourist Boards is the **proactive promotion of destinations during off-peak seasons.**

Whether as a response to summer overcrowding, a strategic move to counter rising holiday prices, or a concerted effort to promote tourism in a more balanced manner beyond peak times - benefiting both the local population and the region - there’s a clear aspiration to **distribute travel more evenly throughout the year.**





THE NEXT HOTTEST DESTINATIONS

RISING STARS

Some of the destinations that are getting more popular overall

- **Turkey** (re-emerging on the top list after a decline in popularity in recent years)
- Albania
- Montenegro
- Jordan
- Cape Verde

TOP CITY BREAKS & SUN AND BEACH DESTINATIONS

City breaks

NYC, Amsterdam, Paris, Barcelona, Dubai, Rome, London, Lisbon, Prague, Dublin, Istanbul.

Sun and beach

Mallorca, Maldives, Tenerife, Red Sea, Dubai, Crete, Turkish Riviera, Dominican Republic, Algarve, Gran Canaria, Lanzarote.

TURKEY



CAPE VERDE



ALBANIA



MONTENEGRO



JORDAN



MOST POPULAR DESTINATIONS BY COUNTRY



UK
Most popular destinations
Amsterdam, Tenerife, Paris,
New York, Barcelona.

Rising stars
Krakow, Algarve, Thailand,
Zanzibar, Gran Canaria.



FR
Most popular destinations
Mallorca, Maldives, New York,
Crete, Marrakech.

Rising stars
Cyprus, Malta, Thailand, Sicily.



DE
Most popular destinations
Mallorca, London, New York,
Turkish Riviera, Barcelona

Rising stars
Dubai, Thailand, Algarve,
Cyprus, Fuerteventura.



IT
Most popular destinations
Red Sea, New York, Paris,
Maldives, Tenerife.

Rising stars
Zanzibar, Fuerteventura,
Thailand, Costa del Sol, Cyprus



ES
Most popular destinations
Maldives, Tenerife, New York,
Lanzarote, Paris

Rising stars
Azores, Cape Verde, Turkey,
Thailand

BEST DESTINATIONS FOR VALUE FOR MONEY

TURKEY

PORTUGAL

SPAIN



THE SOCIAL IMPACT OF TRAVEL

RETHINKING TRAVEL HABITS

In today's world, hopping on a plane and exploring distant lands has become almost second nature. We've all experienced the allure of wanderlust at some point, seeking adventure, relaxation, or simply a change of scenery.

But as we chase the thrill of discovery, there's something we often forget; **the impact of our globetrotting on the places we visit.**

Packed streets, overcrowded beaches, and attractions that are fit to bursting with tourists are just some of the signs of "over-tourism", the not-so-glamorous side of travel. The delicate balance of helping people travel the world, and yet preserve it for the people who live there has become of increasing importance.

So what can travellers do to make their own trips more authentic, help preserve local communities, and make less-visited places thrive?

A first step in this direction would be to try **exploring more off-the-beaten-path destinations.**

But also **travelling during the off-season** may be a way to avoid crowds, give locals some breathing space, and keep the magic alive all year round. Here are some tips for your next adventure.

*...there's something we often forget;
**the impact of our globetrotting on
the places we visit.***



6 HIDDEN GEMS YOU SHOULD VISIT NEXT YEAR:

Venice and its canals are dreamy, but have you considered Turin?

Venice, the iconic Italian city, is under serious threat from too many tourists, rapid development, and rising sea levels due to climate change. With around 30 million visitors each year in a city of less than 50,000 residents, overtourism is a major issue. UNESCO is even considering listing Venice and its lagoon as World Heritage Sites in Danger.

While Venice is timeless there are other lesser-known Italian cities that are worth a visit. **Take Turin, located in the north-west and also known as the 'Paris of Italy'**. Turin is a city of refined elegance, boasting grand architecture, wide boulevards, and a rich cultural heritage.

It's home to world-class museums, including the renowned Egyptian Museum, and also, surprisingly, the birthplace of Nutella. Unlike the crowds that often inundate Venice, Turin offers a more intimate and relaxed atmosphere, allowing you to savour its historical treasures, lush parks, and amazing cuisine at your own pace.



THE HAGUE

Want to avoid AMSTERDAM crowds? Visit THE HAGUE instead!

While Amsterdam undoubtedly charms with its picturesque canals and historic ambiance, The Hague (Den Haag) offers a compelling alternative to the Dutch capital for several reasons.

First, it's the political heart of the Netherlands, housing the Dutch government, international embassies, and organisations like the International Court of Justice, giving it a unique global significance.

The city boasts a more relaxed and spacious atmosphere, with beautiful parks like Scheveningen Beach and the famous Keukenhof Gardens nearby. Its rich cultural scene includes renowned museums like the Mauritshuis and Escher in Het Paleis.

Additionally, The Hague's coastal location provides easy access to the North Sea, offering a perfect blend of city life and seaside tranquillity.

A stroll under the Eiffel Tower in Paris is priceless, but a tour of the Champagne region should be your next romantic escape.

A weekend getaway in Paris, the world capital of love, will always be a must.

However the historical province of Champagne, in the northeast of France, could be a more than valid alternative.

Picture this: you and your partner, surrounded by rolling vineyards, sipping Champagne.

You'll get to sip on world-class bubbly in the very place where it's crafted, creating unforgettable memories (and toasts) together.

You can enjoy private wine tastings at both renowned Champagne houses and smaller, family-owned wineries, stroll through charming villages, and dine on fine French cuisine by candlelight.

BASQUE COUNTRY



CHAMPAGNE

Barcelona is a vibe, but the Basque country is Spain's best-kept secret.

Barcelona dazzles with its vibrant energy, attracting tourists from all over the world who come to experience its perfect blend of beach life and big city ambiance.

In contrast, the Basque Country offers a unique Spanish experience, equally captivating. You'll get to savour pintxos in local bars, wander through charming coastal towns like San Sebastián, and fully immerse yourself in the rich Basque culture, with its impressive cultural heritage and cherished traditions.

Plus, it's a food lover's paradise captivating the hearts and palates of gastronomes from around the world with its remarkably diverse cuisine.

We should mention the stunning landscapes of the Basque Country, where rugged coastlines meet rolling hills, with views nothing short of awe-inspiring.

Want to explore Incan history in Machu Picchu? Try its sister-city Choquequirao.

If you're up for an off-the-beaten-path adventure and a deeper dive into Inca history, Choquequirao is your hidden gem.

While Machu Picchu's mystique remains a must, Choquequirao is equally impressive and less crowded with tourists, offering a more serene and authentic experience. Fewer people tend to visit because it involves a pretty demanding 50-kilometre trek, reaching heights of 3,050 metres above the Apurimac canyon.

The journey to reach it, although challenging, rewards travellers with breathtaking scenery and a sense of archaeological discovery like no other.

These amazing ruins are roughly three times the size of Machu Picchu and you may find yourself exploring them alone - an unparalleled experience!

CHOQUEQUIRAO



CHERRY BLOSSOM

Cherry blossom season in Japan looks like a fairytale, but have you ever heard of the plum blossom season?

Plum blossoms have been gaining increased attention as the 'new' cherry blossoms. But for a lot of Japanese folks, they have always held the title of the true heralds of spring due to their early blooming.

They are also often referred to as the 'winter cousin' of cherry blossoms because they start blooming during the cold season.

These trees are pure beauty and a great alternative if you want to do some hanami (flower viewing) in Japan without dealing with the cherry blossom crowds.

Plum blossom season is way quieter, just as gorgeous, and gives you more wiggle room with your travel dates.

While cherry blossoms come and go in two weeks, plum blossoms show up earlier and stick around longer.

4 PLACES YOU SHOULD CONSIDER VISITING OFF-SEASON:



Greek Islands

Have you ever thought about moving your Greek Islands getaway off the peak season, between November and April? Here are some good reasons: first, you'll skip the touristy chaos and really immerse yourself in the "real" local vibe. Another significant aspect is its affordability compared to the exorbitant prices during the peak of the European summer. Plus, the weather's perfect for some hiking adventures, something that becomes a bit more challenging with the soaring temperatures of the summer months.

And if you're chasing warmth when Europe's freezing, did you know that Crete stands out as one of the places with a warmer winter weather in Europe?



Prague

Visiting Prague during the European winter is a great idea for a more relaxed and cosy experience.

You'll find the city considerably less crowded (of course, except at Christmas time!), allowing you to appreciate its rich history and stunning architecture in a more peaceful and intimate setting. Plus, the Czech cuisine, renowned for its hearty and comforting dishes, is ideally suited for winter, offering a delightful array of soups, stews, and roasted meats to warm your soul.

Moreover, Prague transforms into a fairytale landscape with its charming streets and historic landmarks dusted in snow, creating a magical atmosphere that's hard to resist.



South Africa

Ever thought of visiting South Africa during the winter - June, July and August? You don't even have to change the time zone.

Firstly, it's the perfect time for whale-watching enthusiasts, as these majestic creatures make their appearances at this time of the year (typically between June and October). Of course, the budget will also benefit from lower prices compared to the high season. But most of all, the reduced tourist numbers of these months mean a quieter and more intimate experience.

And here's an insider's tip: during this time, the sparse vegetation in safaris encourages animals to gather at waterholes, enhancing wildlife-spotting opportunities.



New Zealand

June to August is winter on New Zealand's green coasts, and this is a marvellous time to visit this country.

Some of the world's most stunning alpine settings are located here, and this time of the year provides excellent skiing opportunities, drawing skiers and snowboarders from around the world to its pristine peaks.

If you are more up for a relaxing holiday, you can soak in the many hot springs scattered around the country or go wine tasting.

Furthermore, the late sunrises around 8 to 8:30 am will provide a magical backdrop for your adventures.



TRAVELLERS TOP SEARCHES

WHAT DO TRAVELLERS WANT TO KNOW?

Like lastminute.com, Google was launched in 1998, and as a purely online travel agent, they've certainly sent some traffic our way over the last 25 years.

So let's look at what's trending in search within the holiday sphere across Europe.

UK

Au revoir Mickey, Howdy Mini

With Paris set to welcome the Olympics searches for EuroDisney are down (-18%) while Walt Disney World in Orlando, Florida has seen a big bump (+23%)

Love is in the Air(fare)

While the French and Italians are usually more famous for their love lives, our Brits have been visiting our Romantic city breaks in their droves (+135% up from 2022).

All in on All Inclusive

Having a clear idea of holiday spend has become of increasing importance to holidaymakers, seen by the unstoppable rise of the All Inclusive - a whopping 78% more searches were made for All Inclusive deals than in 2022.

DE

Two wheel tours

It seems the Germans can't get enough of their bikes, with interest in cycling holidays one of the top five trending topics.

Looking for luxury

80% of hotel bookings for Germans were in the 4-5 star category, Five Star hotels - (Mallorca, Turkey, Crete, Rhodes, Dubai, Albania, Lake Garda, Bali, Canaries...)

Keeping it cool

With sweltering temperatures in some of the German's favourite Mediterranean destinations, searches turned to cooler climes. Searches for holidays in the likes of Brittany / Scotland / Poland / Sweden / Baltic Sea increased by 100%

ES

Costa Del Over?

It's all about the North of Spain

Are Costa del Sol and the Balearic islands getting a bit too hot and crowded?

Well Spanish are not saying "adiòs" to their local gateways in the amazing spots their country has to offer. And that's how searches for "holidays in Galicia" (+306%), "holidays in the north of Spain" (243%), and "holidays in the Basque country" (191%) have seen a huge surge.

Namaste everyone

Seems like serenity is the new adventure! Yoga holidays are striking a pose in online searches of Spanish travellers (+367% vs last year), with seekers trading 'getaways' for 'get-centred' vibes.

Hotel bookings
80%
are 4-5 stars
in Germany

FR

Cheap holidays wanted

The French love to travel, but when the wallet starts sobbing, tough choices have to be made: which is why searches for 'affordable holidays' have surged by 354% this year.

The Egyptian wave

What could be more fascinating than Egypt, a land full of history and breathtaking landscapes?

According to the travel intentions of French people, nothing. 'Cruises in Egypt' seem to be the most sought-after holiday by far. Followed by 'holidays in France' - because nowhere is like home - 'weekends in London' and 'holidays in Greece'.

Une, deux-ville

With the soaring temperatures in the southern med - searches for northern France spiked, no more so than for delightful Deauville - (315% increase)



IT

That (was) Amore...

Where have the Italian 'Latin lovers' gone? Romantic escapes don't seem to be the trend for Italians right now, as searches for solo travels have surged dramatically.

This is especially true for those who seem to be willing to make a significant change in their lives, as evidenced by a +321% increase in Google searches for 'first trip alone'.

A ticket to anywhere...ish

Italian travel enthusiasts eager for an intercontinental getaway post-pandemic faced an unexpected hurdle: the seemingly endless wait times for passport renewals.

That's why searches for 'where can I go without a passport' surged by +130% this year.

Eastern Mediterranean stealing the spotlight

Italians have their all-time favs destinations, for sure (see Sardinia & Sicily).

But that doesn't mean they are not ready to explore new places, especially if this means saving a few euros. In fact, some of the destinations that grew the most in terms of online searches this year are Albania, Montenegro, and Croatia.

Sri Lanka also made the top 5, with loads of adventurous globetrotters eager to visit this magical place.



SPECIAL FOCUS

CRUISES SETTING SAIL FOR THE FUTURE

Part of lastminute.com group, Crocierissime is the first web platform in Italy entirely dedicated to the world of Cruises, offering real time updates on the best offers and fares available from the best companies, like Msc Crociere, Costa Crociere, Norwegian Cruise Line and Royal Caribbean.

Thanks to Crocierissime, we gain insights on this fascinating world and the key trends that are defining it.

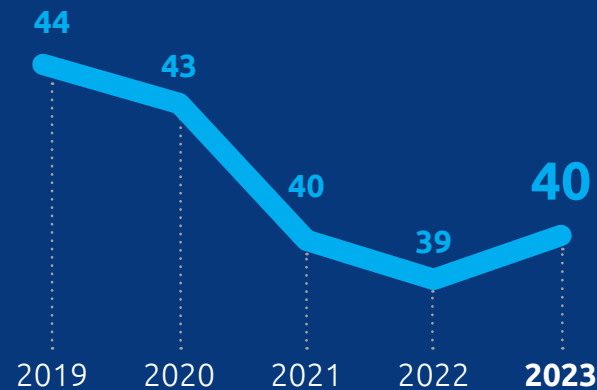
THE NEW WAVE

Who says cruises are only for a “more mature crowd”? As a proof of that, the average age of cruise enthusiasts is progressively decreasing, settling at 40 in 2023, compared to 44 in 2019. In general, our data say that Millennials’ passengers are on the rise, and first-time cruisers are increasing.

So what’s attracting a more youthful vibe onboard? With so many all-inclusive options and entertainment on the ships, you can really control the budget without scrimping on the fun - makes for a perfect family holiday.

And of course not forgetting the Below Deck TV franchise, with shows in multiple countries bringing a younger audience to the world of the ocean waves.

Last 5 year cruise audience age trend



MOST POPULAR CRUISE DESTINATIONS

The absolute favourites:

- Western Mediterranean
- Greek Islands and Eastern Mediterranean
- Caribbean
- Dubai and UAE
- Norwegian Fjords



OCEAN WAVE
AVERAGE LENGTH

8
DAYS

crocierissime

SPECIAL FOCUS

STAYS THAT SLAY

We asked our in-house Hotel Partnerships team which destinations you should be looking at to make the most of a trip away in 2024 - here's their top tips.

Looking for luxury?

You're in luck - as our insiders tell us that there is a host of new top-end hotels opening in key cities like Rome, Venice, Milan & London.

You can often get great deals in hotel's opening weeks as they iron out any teething problems. On top of that, there's the bragging rights.

West, Meet East

Expect to find much more accommodation availability of accommodation in Thailand, China and Japan. As traveller confidence in holidays further afield grows, these trendy destinations are gearing up to welcome more and more tourists.

Making for the Med

Iconic global brand Hilton usually has their finger on the pulse on where's hot, so expect more new sun & beach properties opening in Malta and Greece. Croatia, which seems to be gathering visitors year on year for the last decade remains top of the hot list.

Maybe the Maldives?

Spanish hotel group, Barceló, hopes to make a mark in the Maldives, with a major new opening expected there in 2024.



SPECIAL FOCUS

WHAT HAPPENS ON TOURS..

Germany and France are the biggest market for Tour Operator (TO) package holidays - so in these countries we offer these more traditional travel services alongside our dynamic package holidays.

Never mind last minute, in France 40% of customers booked with less than one week prior to departure vs only 10% of more cautious Germany.

If we take booked departures within the next 2 weeks, the share in France increases to 60% while in Germany it stays low with only 20%.

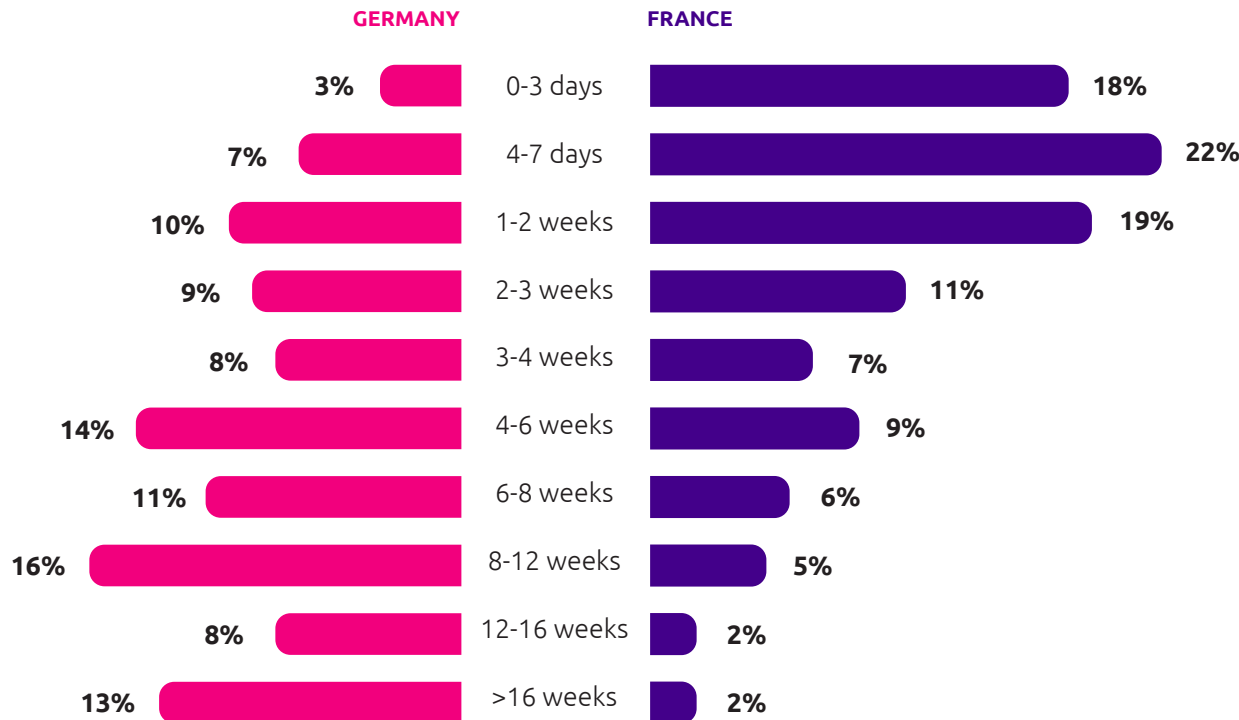
The reasons behind this last minute summer are lots of availability and some fantastic prices on offer for those who were prepared to wait.

However, while advance bookers lost out a little last year, we predict that prices will stabilise more to encourage longer booking windows in 2024.

Tour Operator holidays tend to stick to the traditional seasonality. However, in Autumn 2023 we saw a surge in both countries for autumn holidays with three quarters of all booking in September, for September.

A lot of Germans also decided to delay their trips due to favourable weather forecasts, as indicated by the fact that 25% of summer bookings in Germany were already intended for the autumn holidays.

Tour Operator bookings by lead time



	GERMANY	FRANCE
TOUR OPERATOR		
Length of stay	9,1	7,6
Lead time	62	26
Destinations	Antalya Mallorca Hurghada Crete Gran Canaria	Djerba Hammamet Antalya Crete Tunis
DYNAMIC PACKAGE		
Length of stay	5,8	6,3
Lead time	44	35
Destinations	Mallorca Barcelona London Crete Antalya	Mallorca Crete Marrakech Barcelona Lisbon

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