

Press Release

European Tourism Reaches New Highs In 2024 As Travellers' Plans Diversify

- **Strong Recovery:** Foreign arrivals and overnights surpass 2019 figures in the first half of 2024
- **Regional Leaders:** Southern Europe and Mediterranean destinations show notable increases in arrivals, driven by Serbia, Malta, and Portugal
- **Diversified Tourism:** Travel increases to lesser-known destinations, such as Albania and Montenegro
- **Rising Expenditure:** Tourists in Europe are expected to spend €800.5 billion in 2024, up 13.7% since 2023
- **Positive Online Sentiment:** Discussions highlight the appeal of less-crowded destinations and sustainable travel

Brussels, 11 July 2024: Europe's tourism industry continued its recovery in the second quarter of 2024. Foreign arrivals (+6%) and overnights (+7%) surpassed 2019 figures, reflecting a year-on-year increase of 12% and 10%, respectively. The growth is propelled by robust intra-regional travel from Germany, France, Italy, and the Netherlands.

This is according to the latest edition of the '**European Tourism Trends & Prospects**' quarterly report released today by the European Travel Commission (ETC). This report monitors the performance of European tourism in the second quarter of 2024, providing a comprehensive analysis of the region's latest tourism and macroeconomic developments.

Commenting on the report's publication, **Miguel Sanz, ETC's President**, said: *"It is encouraging to see the increasing diversification of the European tourism landscape this quarter. This benefits both emerging destinations and established hotspots that may potentially face overcrowding. Furthermore, growing tourist numbers in lesser-known areas will help small businesses still recovering from the pandemic or struggling with rising operational costs due to the current economic context. We welcome a more balanced spread of tourism across Europe, contributing to the increasing sustainability of our industry."*

Established and emerging Southern European destinations maintain appeal

Year-to-date data indicates that both traditional and non-traditional **Southern European** and **Mediterranean destinations** continue to be the most popular choices for tourists in Europe. Notable increases in arrivals compared to 2019 levels were recorded in **lesser-known destinations** such as Serbia (+40%) and Bulgaria (+29%), as well as long-standing favourites including Malta (+37%), Portugal (+26%) and Türkiye (+22%). The ongoing success of these destinations is partially due to their common offer of value-for-money experiences and generally favourable weather conditions.

The **Nordic countries** also show growing appeal, with foreign overnights up in Denmark (+38%), Norway (+18%), and Sweden (+9%). This indicates increasing success outside Southern Europe and in destinations that are relatively more expensive.

Conversely, the **Baltic region** continues to struggle, with Latvia (-24%), Estonia (-16%), and Lithuania (-15%) still experiencing international arrivals well below 2019.

Tourism faces rising costs, but expenditure grows

Significant challenges continue to affect the travel sector. Tourism professionals cite **rising costs** of accommodation, business operations, and flights, along with **staffing shortages**, as major issues. Despite their ongoing impact, these challenges have lessened compared to the previous quarter.

Increases in business costs have led to a general rise in **travel expenditure**. Visitors are expected to spend **€800.5 billion** in Europe this year, up 13.7% since last year. This results from increased operating prices, the return of high-spending tourists from the APAC region, and strong demand from events and blended business-leisure travel. The **accommodation sector** especially benefitted in the first half of the year with revenue per available room up 5.4% and occupancy rates up 1.8%.

The most significant increases in **inbound spending** for the year-to-date are in Spain (25%), Greece (25%), Italy (20%), and France (16%). Other countries such as Croatia, Bulgaria and Romania expect to see longer average stays in 2024 than the previous year, which will also result in increased tourism revenue.

Search for value, return of Asian markets and rail travel drive diversification

The report identifies an increasing **diversification** of European tourism, with emerging destinations and source markets growing their market share. Contributing factors include the search for value-for-money in non-traditional destinations, the return of travellers from the Asia-Pacific region, and the increasing availability of rail travel.

Though the US remains the best-performing long-haul source market, there is a notable uptake from **East Asian** markets, especially **China**. European cities are proving a particular draw for Chinese visitors, as China is expected to become the fastest-growing source market for city destinations in 2025, overtaking the US.

There is also an increase in the number of travellers choosing off-season travel and lesser-known destinations, driven by the search for **value-for-money** and unique, authentic experiences. Notably, Albania and Montenegro have witnessed a remarkable rise in market share, up 86% and 31% respectively, since 2019.

Increasing interest in travelling off the beaten track is also reflected in online conversations about European travel, which highlighted the appeal of **natural island settings**, such as Madeira in Portugal and Magerøya in Norway. Both of these countries saw a corresponding increase in arrivals and overnights. **Sustainability** was a key positive reputation driver for destinations this quarter, while more negative discourse focussed on the social and environmental impacts of **overcrowding** in traditional tourism hotspots.

At the same time, the growth of **rail capacity** is opening the door for travellers to explore new experiences and destinations. Germany's national railway company, Deutsche Bahn, saw a 21% increase in international routes between 2019 and 2023, primarily benefitting neighbouring countries. Eurostar services have returned to pre-pandemic passenger levels, and Spanish rail operator Renfe reported selling 500,000 tickets within six months of launching its international line to France. All three of these operators have plans to expand capacity in the coming years, highlighting rail's growing importance in European tourism.

The full report can be downloaded from: <https://etc-corporate.org/reports/european-tourism-2024-trends-prospects-q2-2024/>

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Note to editors

The **European Travel Commission** (ETC) represents the national tourism organisations of Europe. Established in 1948, ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to promote Europe in third markets. Its 36-member tourism boards work together to build the value of tourism for all the diverse European destinations through cooperation in sharing best practices, market intelligence and promotion. For more information, visit www.etc-corporate.org and follow [@ETC_Corporate](https://twitter.com/ETC_Corporate).

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