

Positive momentum for European tourism heading into the summer high season



Consumers still travel more despite higher prices with year-to-date international tourist arrivals for Europe up **12%** from last year and **6%** from 2019.

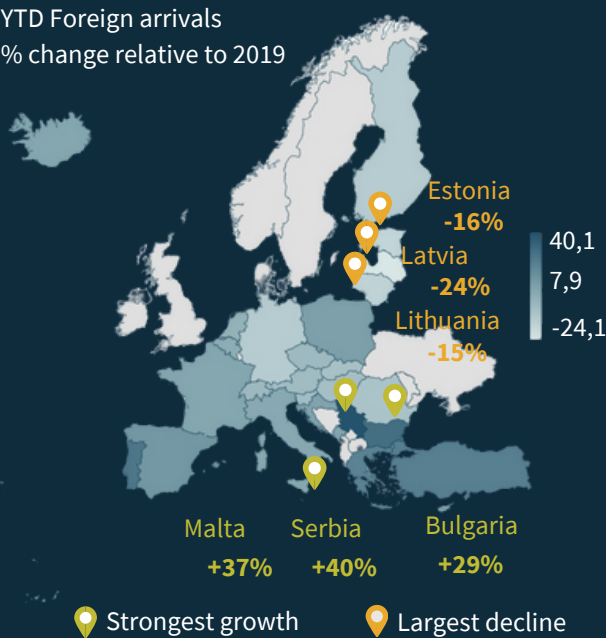


European travellers have diverse preferences for travel, including short and medium-haul options and a mix of luxury and budget destinations.



Value for money in non-traditional destinations, the return of Asia-Pacific travellers, and increased rail travel availability are increasingly shaping Europe's tourism landscape.

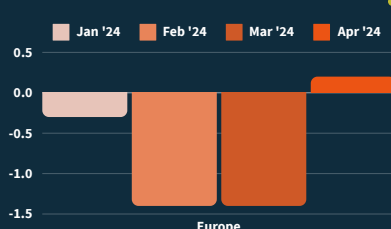
YTD Foreign arrivals % change relative to 2019



Aviation

European Air passenger traffic has recovered to 2019 levels.

Monthly Air Passenger Growth (% change vs. 2019, RPK)



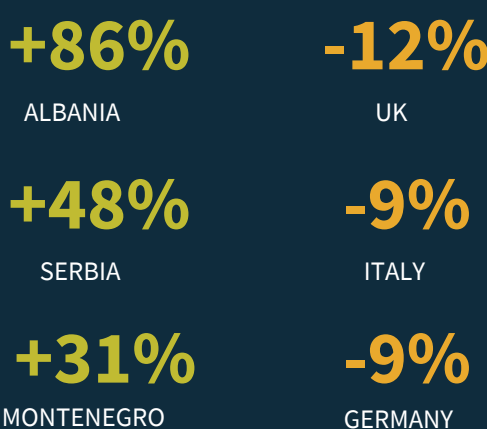
in April, RPKs were **0.2%** above 2019 levels.

Special Focus

Broadened Travel Demand in 2024

Off-the-beaten track destinations and rail travel are gaining in popularity, and tourists are more price conscious.

Share of overnight international arrivals between 2019 and 2024



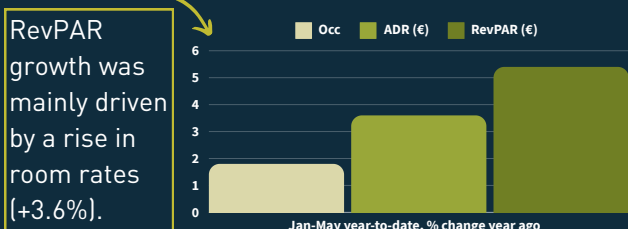
Less crowded and budget-friendly destinations are becoming more popular.

Accommodation

So far this year, European hotels outperformed all global regions except the Middle East and Africa.

**+5%**

Hotel Performance - Europe



RevPAR growth was mainly driven by a rise in room rates (+3.6%).

European Travel Sentiment

Which topics sparked great interest in online discussions?

Positive Drivers

- Off-the-beaten-path island destinations
- Nature & sustainable travel
- Mysterious places

Negative Drivers

- Crowd control measures (e.g., entrance fees)
- Commercialisation of Europe's iconic city centres
- Security concerns due to the simmering conflict between Russia and Ukraine

The Value of European Tourism



Spain (+25%) has rebounded the most in inbound travel spend relative to 2019, while Romania (-16%) suffers from the absence of expenditure from Russian tourists.

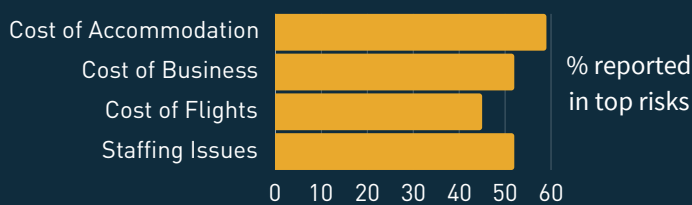


VFR may drive further growth in average length of stay in Romania in 2024.

**6** (x̄) nights per trip

Risks to European Tourism Growth

Top 4 Key Global Tourism Challenges



Key Source Market Performance

Intra-European



**+180%** Arrivals  
Montenegro was the top performer for British travel.

**-35%** Arrivals  
Slovakia was the lowest performing destination.



**+95%** Arrivals  
Iceland has emerged as a top destination for Italians, with nights up **74%**.

**-38%** Arrivals  
The largest decline was reported by Luxembourg.

Non-European



**+119%** Arrivals  
US arrivals to Portugal have more than doubled compared to 2019.

**-23%** Arrivals  
Luxembourg continued to be the least performing destination.



**+22%** Arrivals  
Largest gains were evident in Serbia, Montenegro (+16%) and in Spain (+17%).

**-76%** Arrivals  
The lowest performance was recorded by the Czech Republic.

\* All numbers are relative to 2019 levels.

To access the full report and dive deeper into the detailed results, click here now to download your copy.

**FULL REPORT**

