Long-Haul Travel Barometer 1/2025

Travel horizons:
January-December 2025 & January-April 2025

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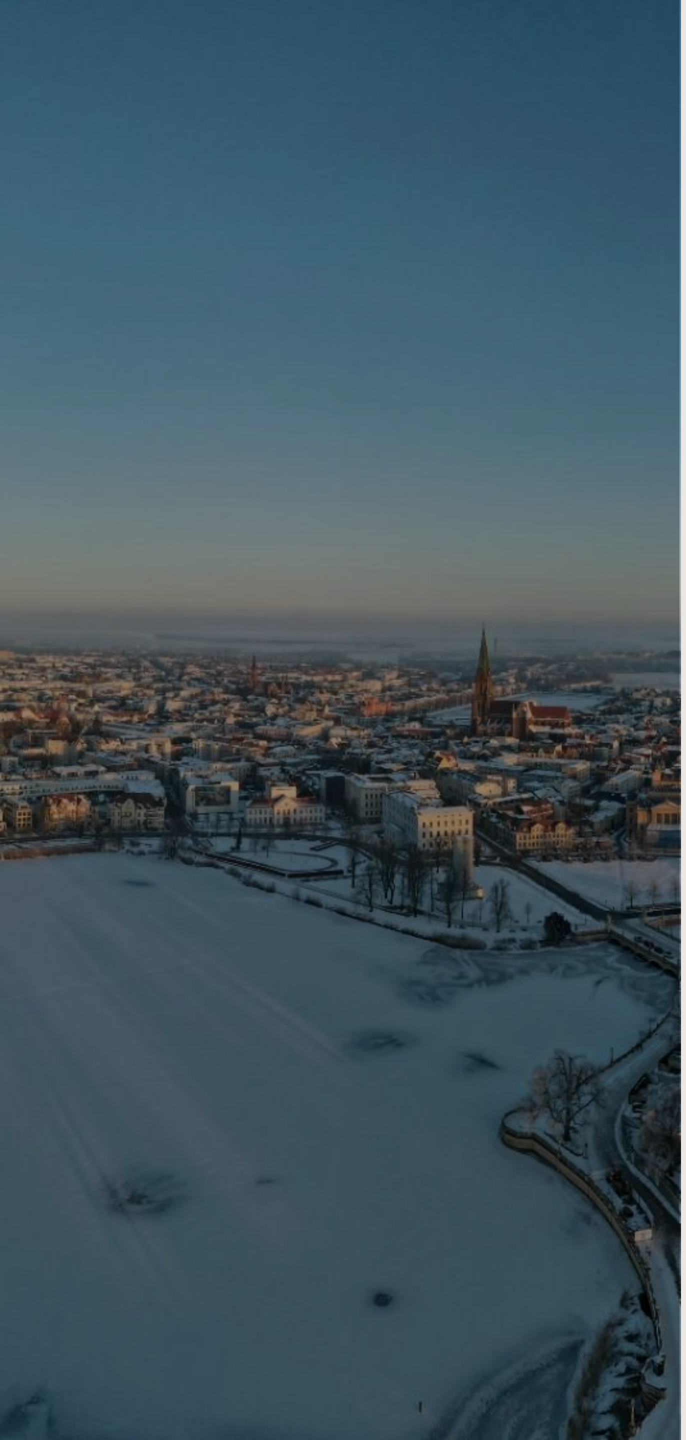


Methodology

Target

Potential travellers from Australia, Brazil, Canada, China, Japan, South Korea (new market) and the US.

Method

- 1,000 online interviews with national representatives (18-70 years old), per market, per wave.
- Data collection: 2-18 December 2024

Significant changes

The **significant year-on-year changes** are presented in percentage points, marked with the following symbols

Increase ▲ Decrease ▼

Analysed samples

January-December 2025 (12 months horizon):

- Total respondents: **7,087**
- Respondents likely to travel to Europe: **3,273**

  Australia (523), Brazil (593), Canada (485), China (765), Japan (217), St. Korea (313), US (377)
- Respondents likely to travel long-haul but not to Europe: **1,305**
- Respondents not planning to travel long-haul: **2,509**

  Australia(245), Brazil (266), Canada (308), China (204), Japan (658), St Korea (350), US (478).

January-April 2025 (4 months horizon):

- Total respondents: **7,087**
- Respondents likely to travel to Europe: **2,105**

  Australia (290), Brazil (393), Canada (230), China (721), Japan (104), St. Korea (182), US (185

The survey is meant to gauge travellers' attitudes and intentions and not to quantify demand levels.

Outlook for 2025

Travel horizon:
January-December 2025

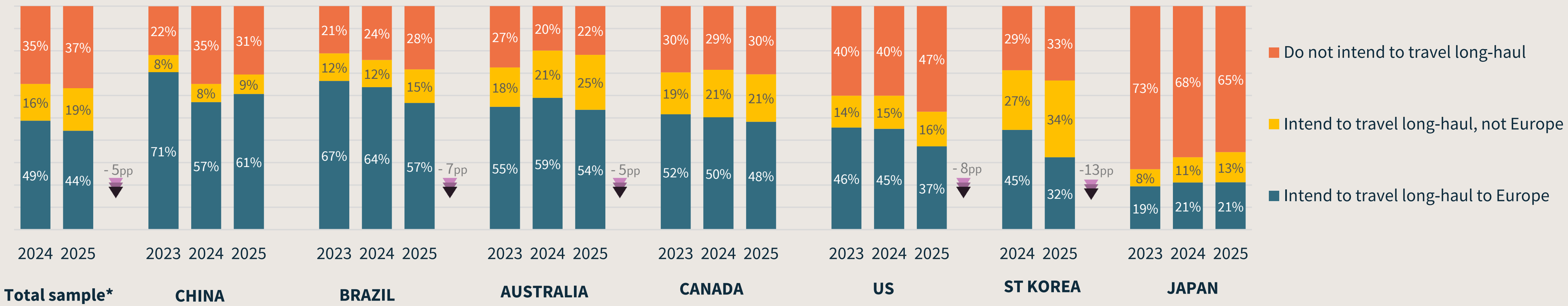
01

Mixed outlook for Europe's appeal in key overseas marketst

- Among travellers in key long-haul markets, 63% plan to take a long-haul trip in the next twelve months - a drop from last year's 65%. Europe, in particular, is seeing a noticeable decline in interest, with 44% of respondents intending to visit the region in 2025, down from 49% in 2024.
- **Chinese travellers** show the strongest travel intention, with 61% planning a trip to Europe in 2025, up 4 percentage points from 2024, though not statistically significant. While travel sentiment in China continues to improve, it remains under pre-pandemic levels.
- **Brazilians and Australians** follow, with 57% and 54% of respondents, respectively, intending to visit Europe in the coming year. However, both markets have seen a sharp decline in travel intent compared to last year, when figures stood at 64% for Brazil and 59% for Australia.
- In **Canada**, 48% of respondents plan to visit Europe, a slight decrease from the previous year. Rising travel costs remain the primary factor hampering most Canadians' travel plans.

Intentions for long-haul travel

Annual evolution (arrows indicate the significant YoY percentage point changes)



*2023 figures for the total sample are not included, as the South Korean market was not part of the research during that year. Sample size: 1000 respondents per market.

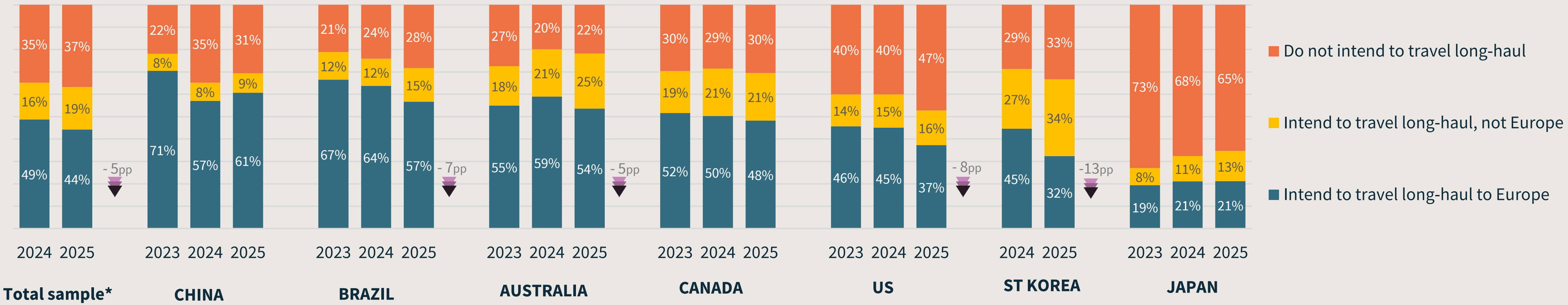
Mixed outlook for Europe's appeal in key overseas marketst

Continuation

- Meanwhile, travel intentions among **US** (37%) and **South Korean** (32%) citizens have dropped significantly. The share of US travellers planning a European trip has fallen by 8 percentage points (from 45%), marking the lowest level recorded since 2021. This decline aligns with the sharp 8.1 points drop in the *Consumer Confidence Index®* seen in December 2024. While high travel costs remain a key deterrent, many US respondents also cite a preference for domestic travel as another major reason. South Korea has seen an even steeper decline, with European travel intentions dropping by 13 percentage points from last year's 45%. Travel *confidence in this market has also reached its lowest level* in over two years amid growing political uncertainty. Consumer spending within this market is down, with travel among the hardest-hit categories.
- In **Japan**, the outbound travel recovery remains slow, mainly due to the weak yen and rising travel costs, and while a gradual rebound is expected, progress remains sluggish. Japanese respondents remain the most hesitant about long-haul travel, with only 21% planning a trip to Europe in 2025 – similar to last year.

Intentions for long-haul travel

Annual evolution (arrows indicate the significant YoY percentage point changes)

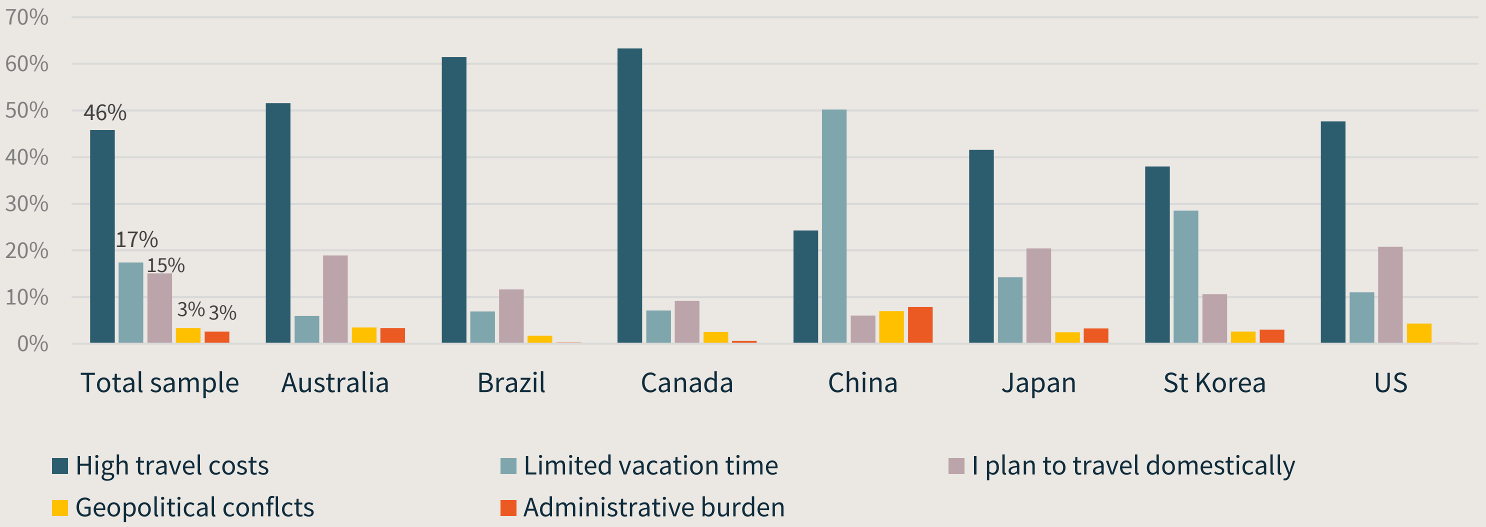


*2023 figures for the total sample are not included, as the South Korean market was not part of the research during that year. Sample size: 1000 respondents per market.

What's holding travellers back?

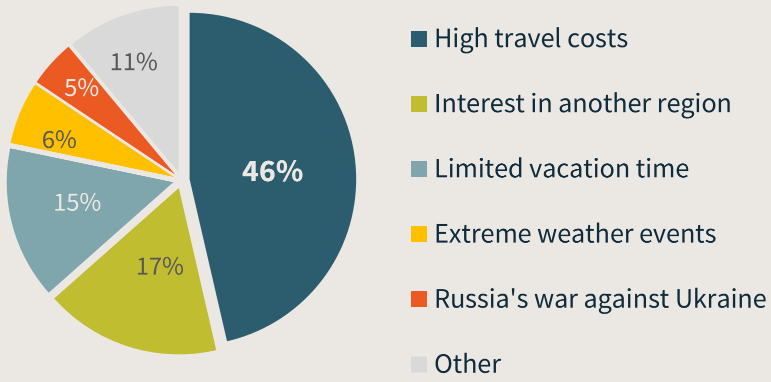
- 46% of all respondents who do not plan overseas trips in 2025 cited the **high costs as the primary deterrent**. **Younger (18–34) and middle-aged (35–49) travellers** are the ones **most discouraged by the financial demands** of long-haul travel.
- Market-wise, **China** presents a different picture from other markets. **Limited holiday time is the dominant barrier**, cited by 50% of respondents there. High travel costs follow, while the administrative burden of long-haul travel, although cited by just 8%, remains the third most notable obstacle in this market. In the **US, Japan, and Australia, the preference for domestic travel is the second most significant barrier to travelling abroad** (after prices), with 21%, 20%, and 19% of respondents, respectively, opting to stay closer to home.
- Almost half (46%) of respondents who are **open to international travel but not to Europe indicated high costs as the main deterrent**, somewhat confirming the perception of Europe as an expensive destination. Additionally, **17% shared an interest in other regions, while 15% cited the time constraints**. Concerns over geopolitical instability appear to have a lesser impact on travel decisions than in the past years - **just 5% of respondents identified Russia's war with Ukraine as a barrier to visiting Europe** - those aged 50+ showed greater concern about the war's impact on safety than the younger age groups.

Barriers to travelling long-haul in 2025*



*The sample comprises **respondents not planning to travel overseas in 2025**.

Barriers to travelling to Europe in 2025**



** *The sample comprises **respondents from all markets who intend to travel long-haul but not to Europe**.*

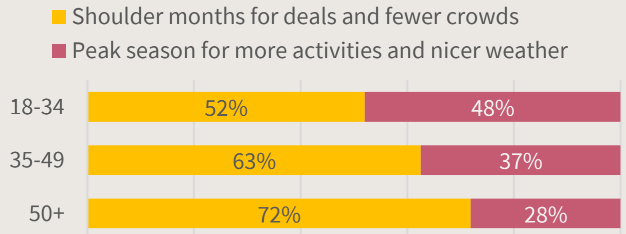
Younger travellers show the highest intention to visit Europe in 2025

Intention to travel to Europe in 2025 by age group

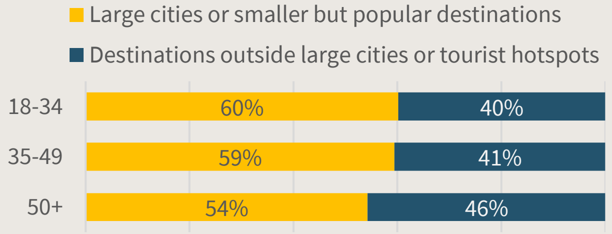
When and where to expect them?

- Compared to other age groups, younger travellers (under 35 years old) are less decisive about their preferred time of travel to Europe. Nearly equal shares of the younger respondents prefer to travel during shoulder months (52%) and the peak travel months (48%).
- Additionally, younger respondents expressed a slightly stronger interest in popular destinations compared to those over 50. Their relatively limited travel experience and desire to visit iconic, picturesque sites in Europe may explain this trend.

Preferred period to visit Europe



Preferred type of destination to visit in Europe

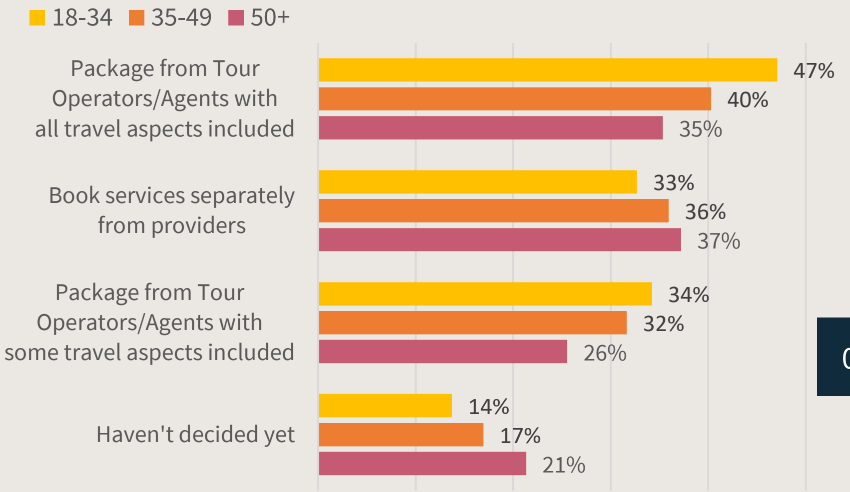


Travellers under 35 prefer purchasing complete packages for carefree holidays in Europe

Despite being highly tech-savvy and having access to a wide range of information channels, **respondents under 34 years old** are **significantly more inclined** than their older counterparts (47% vs 35%) **to purchase all-inclusive packages from Tour Operators or Travel Agents**, e.g., including flights, accommodation, excursions, entrance fees, etc. A similar trend is observed with partial packages, such as those covering only flights or accommodation. This preference could be driven by a desire for clearer upfront pricing, the potential savings offered by package deals, the convenience of having all arrangements handled in advance, or simply a lack of travel experience leading to a preference for hassle-free planning.

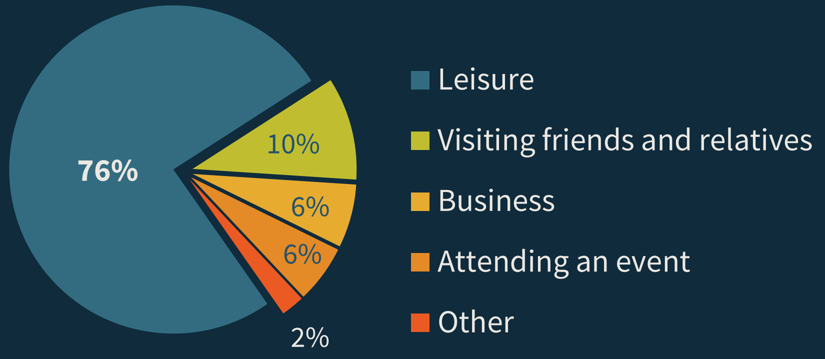
The 18-34 age group also appears to be the most decisive about the way they will purchase their next trip. In contrast, 21% of older respondents (50+ years old) have yet to decide whether they prefer to use the services of a tour operator/ travel agent or book the travel elements separately.

Preferred way of booking trip to Europe



Leisure remains the most common reason for visiting Europe in 2025

Main travel purpose

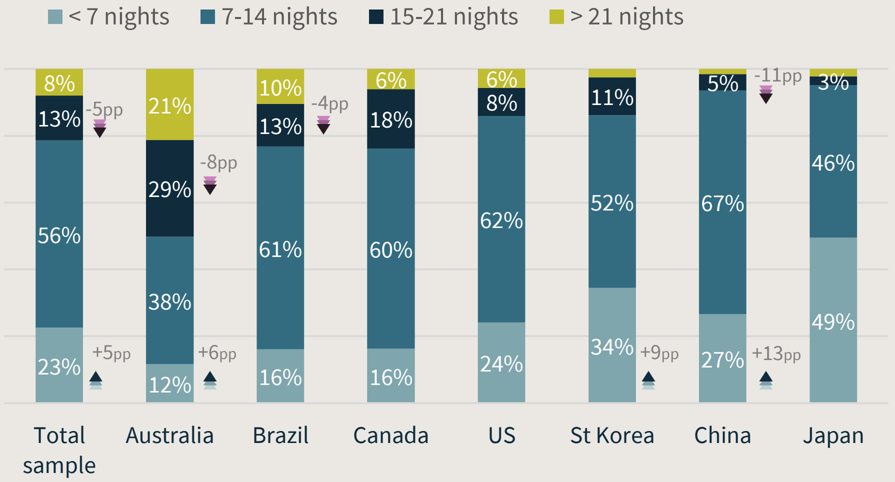


The interest in extended stays declines

While the most popular length for holidays in Europe remains 7-14 nights, as seen last year, there are noteworthy shifts in the share of people planning longer and shorter holidays. The number of respondents considering stays of less than 7 nights has risen significantly (+5%), while the proportion of those planning stays of 15-21 nights has dropped by the same margin (-5%) compared to a year ago.

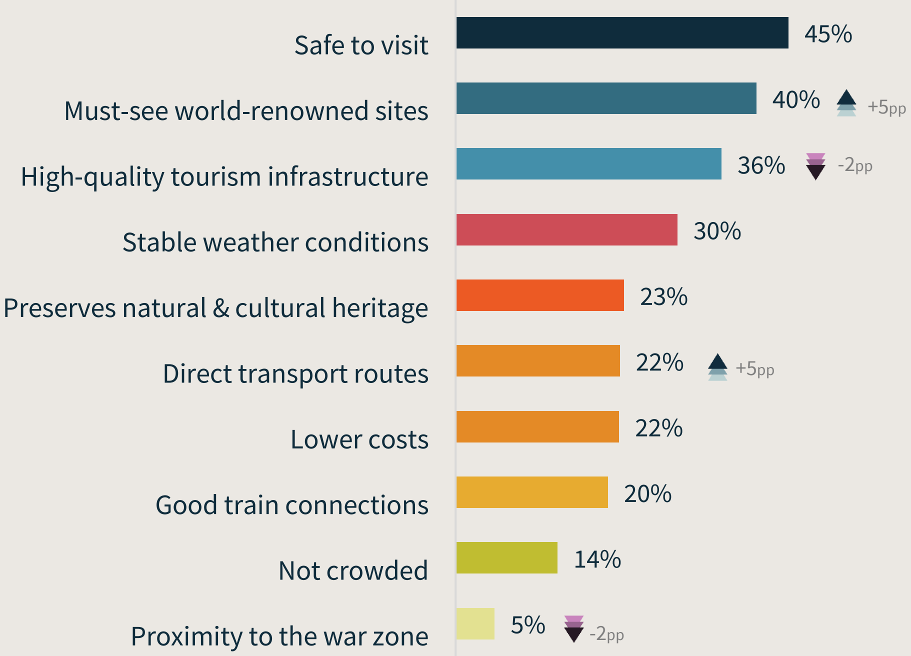
This trend is most evident among Australian, Brazilian and Chinese respondents, where the share of prospective travellers expecting to spend 15-21 nights in Europe has fallen significantly compared to 2024. At the same time, a notably higher proportion of travellers in Australia, China and South Korea now expect to spend less than 7 nights.

Length of stay



What matters when choosing a holiday destination?

Destination selection criteria



Famous landmarks and direct routes play an increasingly important role in destination selection

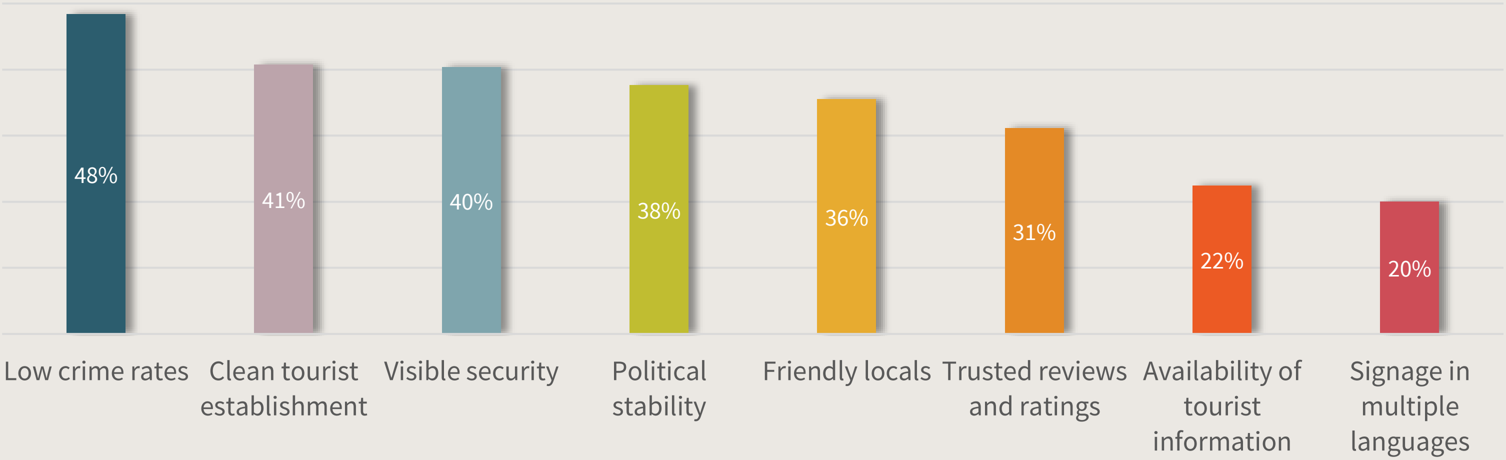
Visitors from overseas markets prioritise three key factors when choosing a European destination for their holidays: **the perceived safety of the location**, its **world-renowned sites**, and a **well-developed infrastructure,** such as transport networks, accommodation and access to attractions.

While the ranking of these priorities remains unchanged from last year, there are notable shifts in the relative importance of some destination selection criteria. For instance, the **significance of iconic landmarks and attractions has grown**, with Australian, Brazilian, and Japanese travellers placing greater emphasis on this factor than before. Likewise, **more travellers are now factoring in direct transport routes when planning their itineraries**, with a marked increase in importance among the Chinese respondents.

In contrast, the significance of the destination's tourism infrastructure and its proximity to the war zone in Ukraine has decreased compared to 2024.

What makes a destination safe?

Safety is by far the most important - and consistently top-ranked - criterion for choosing a holiday destination among travellers worldwide. Yet, it remains highly subjective and personal. Here is what respondents in this research consider essential for a destination to feel safe.



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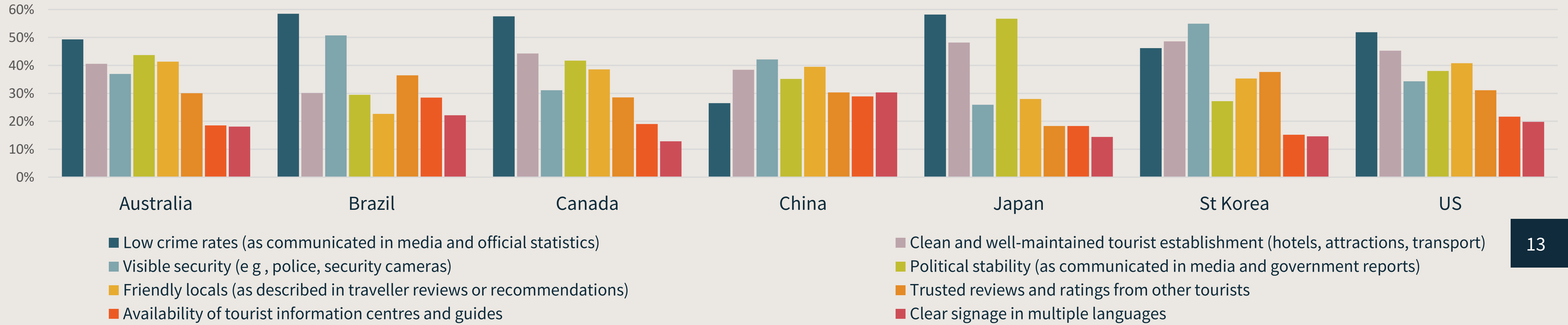
Safety perceptions are multifaceted and culture-dependent

Markets' perspective

While some concerns, such as low crime rates, are common, the specific safety priorities vary across markets based on cultural expectations and experiences:

- **Clean and well-maintained tourism establishments** emerge as the second key safety dominator across markets. Tourists expect a high standard of hygiene and upkeep, particularly in hotels, attractions, and transport. This reflects both practical concerns about health and hygiene and a broader desire for comfort and reassurance, especially among Koreans (49%), Japanese (48%), and US (45%) travellers.
- Both **political stability** and **visible security** are important factors in shaping safety perceptions, but their importance varies considerably across markets. While **political stability** is viewed as paramount by travellers from markets such as Japan (57%), Australia (44%) and Canada (42%), **visible security** takes precedence in others, especially in St Korea (55%), Brazil (51%) and China (42%).
- The value of a welcoming environment driven by **friendly locals** is not as universal as other safety measures (e.g. low crime rates) but needs to be carefully considered as it plays a central role for travellers from markets like Australia and the US (both 41%), China (40%) and Canada (39%)
- **Trusted reviews and ratings** also play a significant role in shaping safety perceptions, acting as a key deciding factor for many travellers when choosing a destination. Their impact is most pronounced in markets such as St Korea (38%), Brazil (36%), and the US (31%), where social validation may be playing a stronger role in confirming a destination's safety.

What makes a destination safe in your opinion?



Overseas travellers prefer Europe's famous sights over hidden gems

Preferred destination type

61%

Popular destinations

I prefer visiting large cities or smaller but popular destinations in the countries I visit

39%

Off-the-beaten-path

I prefer visiting destinations outside the larger cities/ tourism hotspots in the countries I visit

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Preferred attractions to visit once at the destinations

Natural attractions *(national parks, mountains, lakes)*
40%

Urban attractions *(iconic city squares, famous shopping streets)*
39%

Gastronomy and culinary venues *(food markets, wineries)*
35%

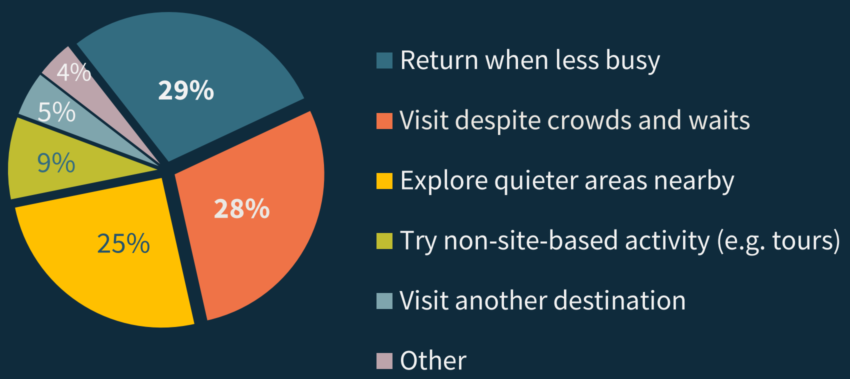
Heritage sites *(UNESCO sites, ancient ruins)*
35%

Art and history museums *(national galleries, historical exhibitions)*
34%

Architectural buildings/sites *(cathedrals, modern landmarks)*
33%

Would overcrowding change travellers' plans?

What is your response if your destination spot is overcrowded?*



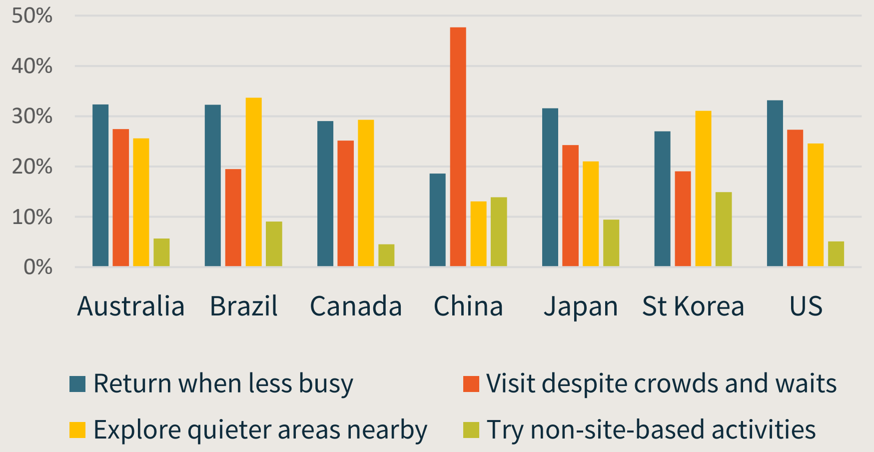
** Question: You are at your chosen European destination and see that a few places you wanted to visit (e.g., a museum, local market, a panoramic view, etc.) are overcrowded. Which one of the following actions would you most likely take?*

Overseas travellers are drawn to Europe's popular destinations and iconic attractions, which may lead to overcrowding, particularly during peak season. To explore how travellers might respond in such situations, this survey delved into the actions travellers would take if they found themselves facing overcrowded attractions at their destination.

Results indicate that while clearly affected by the crowds, long-haul travellers are flexible. A notable 29% would take a strategic approach, opting to return to the place during quieter times, such as early morning or evening, to avoid the crowds. Another 28% of respondents would push through and still visit the crowded spots, despite the long queues and waiting times. For 25%, the solution would be to shift focus, exploring less crowded areas within the same destination. **Only 5% of travellers would consider changing their destination altogether.**

Chinese travellers, in particular, stand out for their willingness to 'embrace' the crowds. 48% indicated they would still visit the attractions that they had originally planned to despite the high numbers of visitors and waiting time - a significantly higher share than the overall sample.

What's your response if your chosen destination spot is overcrowded?



Outlook for early 2025

Travel horizon:
January-April 2025

02

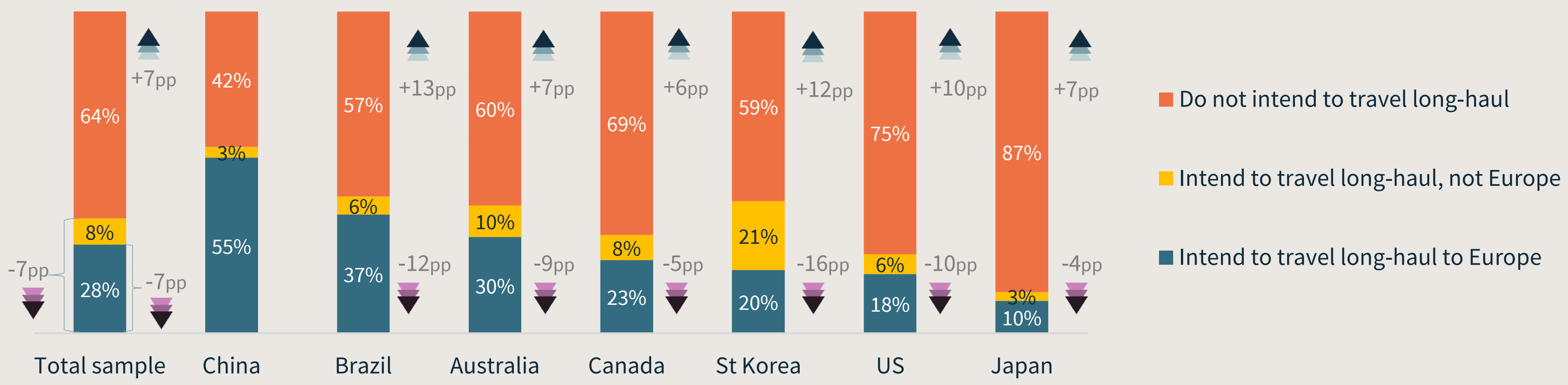
Weak consumer confidence and high costs dampen travel plans in early 2025

As 2025 begins, long-haul travel sentiment has taken a noticeable hit. In key overseas markets, only 36% of respondents plan to take a long-haul trip in the first four months of the year, representing a drop of seven percentage points compared to early 2024. Among those still considering long-haul trips, just 28% plan to visit Europe, down significantly from 35% in the same period last year.

- Only **China bucks this trend.** Chinese stand out as the most eager to travel, with 55% of respondents planning to visit Europe between January and April 2025, up slightly from 50% last year.
- **Brazil** registers the second-highest intention to visit Europe (37%), but this represents a sharp drop of 12 percentage points from 49% in early 2024.
- Travel intentions have also taken a hit **in Australia and Canada**. In Australia, the share of travellers planning a European trip has fallen from 39% to 30%, while in Canada, it has declined from 28% to 23%.
- The sharpest declines, however, come from the **US and South Korea**. Just 18% of Americans plan to visit Europe in early 2025, down from 28% and the lowest recorded figure since 2015 (when this research was launched). This decline may be a reflection of customers' uncertainty surrounding Trump's second term and policies, which may push for domestic tourism and result in changes to international travel agreements, causing further caution among US consumers. Meanwhile, South Korea has seen travel intentions drop from 36% to 20%, continuing a downward trend since this market was first introduced in the research in 2023.
- **Japan** remains the most hesitant market, with only 10% planning a European trip, down from 14% last year.

Intentions for long-haul travel in Winter/Spring 2025

Horizon: January-April (arrows indicate the significant YoY percentage point changes)



What's driving this shift?

- **High travel costs** remain the biggest barrier, cited by 46% of respondents.
- **Limited holiday time** (17%) and a **preference for domestic (15%) or regional (13%) travel** are also keeping more people closer to home.
- **Falling consumer confidence** is weighing on travel sentiment, particularly in the US, South Korea, and Brazil, where economic and political challenges have made travellers more cautious about spending.
- China is the exception, with stronger demand driven by the upcoming Chinese New Year and recovering air connectivity.

In line with cost concerns, planned holiday budgets decrease vs 2024

- The most frequently cited daily budget for European holidays falls between €100-200 per person, chosen by 42% of respondents, representing a 14 percentage points increase from the same period last year. Meanwhile, the share of those planning to spend over €200 per day has dropped to 30%, a notable 13 percentage point decline.
- The most significant shifts are seen in China. For years, the majority of Chinese respondents planned to allocate more than €200 per day, but this is no longer the case. Instead, the €100-200 range has become the most common, while the share of those planning to spend over €200 has dropped sharply to 29%, down from 78% last year.
- A somewhat similar trend is evident in Brazil, where the €200+ daily budget remains the most frequently mentioned (40%) but has dropped significantly over last year, while the share of Brazilians considering spending up to €100 daily has increased.

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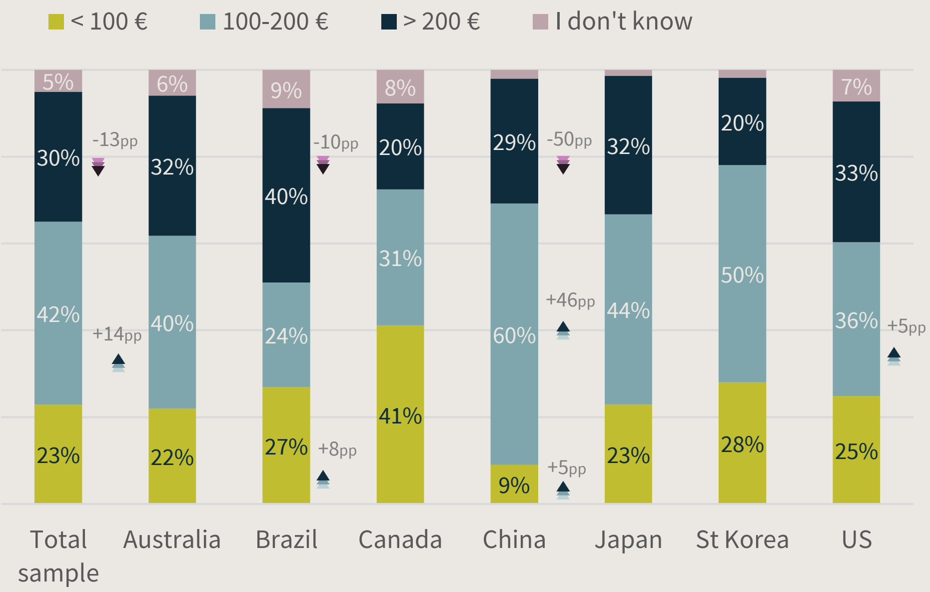
Intended daily budget*

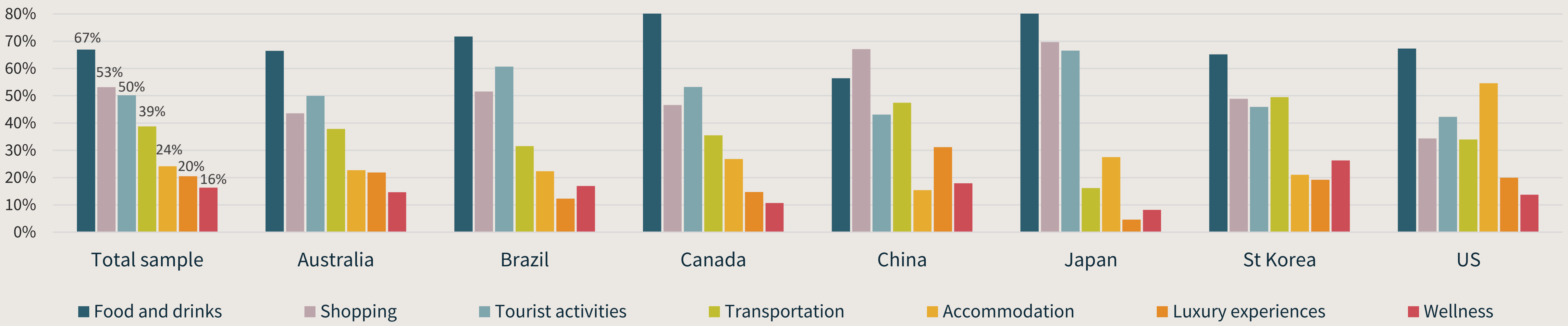


*Expenditure is per person and includes accommodation, food and other activities - excluding flight tickets to Europe

Asian travellers splurge on shopping, Americans on accommodation
- who spends on what?

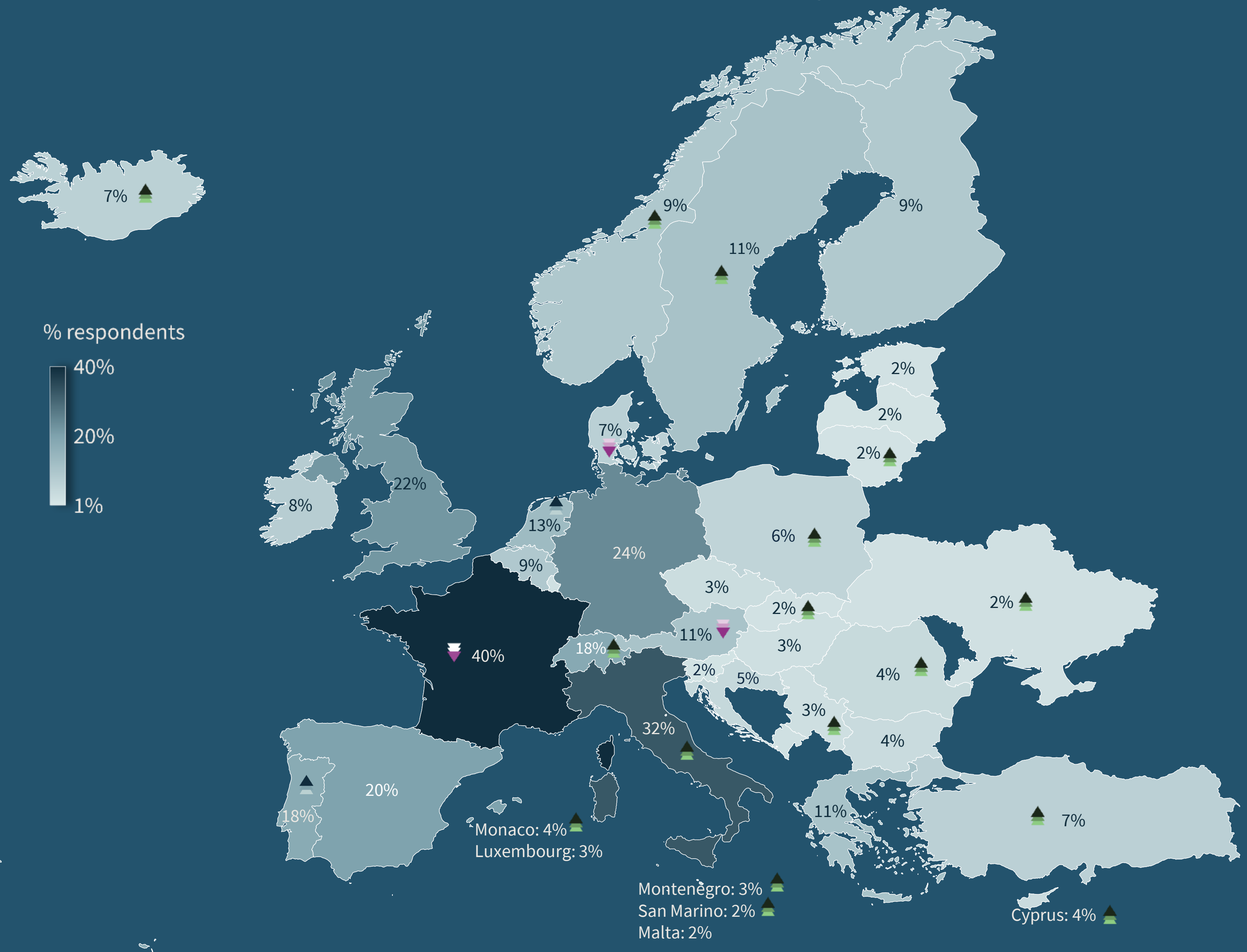
- **Dining emerges as the top spending priority** for travellers across all surveyed markets, except for China, with 67% of respondents highlighting food and drinks as their primary expenditure. Japanese (80%), Canadian (80%), and Brazilian (72%) travellers, in particular, place the greatest emphasis on this category.
- **Shopping follows as the second most significant holiday expense**, though its importance varies widely among markets. It is a major spending priority for travellers from China (67%) and Japan (70%), while interest in shopping is notably lower among US travellers (34%).
- **Tourist activities also figure prominently**, with 50% of respondents considering them a key area of spending. For Brazilian travellers (61%), this category ranks second in budget allocation. A large share of Japanese travellers (67%) prioritise it as well, although it is ranked less important than shopping. When it comes to **luxury experiences**, Chinese travellers are the most willing to allocate funds, with 31% prioritising this expense compared to just 20% of the total sample.
- **39% of respondents classify spending on transport as essential.** Moving around is particularly prominent among travellers from China (47%) and South Korea (49%), backed up by their strong interest in multi-destination travel within Europe.
- Surprisingly, **accommodation is not a top priority**, ranking fifth overall, with just 25% of travellers allocating substantial funds to it. Notably, US travellers (55%) plan to allocate significantly more budget on accommodation than travellers in the rest of the analysed markets.

Which of the following categories do you expect to spend the most on during your next trip to Europe?



Where to?

Preferred European destinations for holidays in winter/spring 2025



Multi-destination travel is on the rise!

94% +14pp

- Respondents are showing a stronger intention for multi-destination trips in Europe, with 94% planning to visit more than one country, **up 14 percentage points from last year.**
- The **average number of countries planned is 3.4**, with South Korea leading at 5.2.

*Significantly **more** / **less** respondents want to visit this country compared to January-April 2024.*
Sample size: 2,105

What are the most preferred booking strategies?

Full-package holidays to Europe are the preferred choice for most surveyed travellers, with first-time visitors showing a significantly stronger preference (59%) compared to repeat travellers (41%).

51% — **Full package from a tour operator** (flights, accommodation, food excursions, entrance fees, etc.)

39% — **Partial package from a tour operator** (only flight tickets, flight tickets and accommodation only, etc.)

36% — **Separate bookings** of different travel aspects (flights, accommodation, excursions, events, etc.) **from various providers.**

Multiple answer question

Per market:

- 76% of Chinese respondents prefer **to book a full-package deal**, making it the dominant choice in this market.
- In contrast, interest in full-package deals is much lower among Canadians (24%) and Americans (37%).

- **58% of respondents in St Korea** plan to book a **partial package deal**, followed by Chinese (55%).
- In contrast, Brazilians (24%), Americans (23%) and Canadians (28%) show the least interest in this option.

- **Booking travel services separately is the preferred choice among US (45%), Canadian** and **Australian (44% both)** respondents. Significantly more travellers in these markets opt for this approach than in the total sample.
- In contrast, separate bookings are less favoured in Brazil and China (28% both).

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Long-Haul Travel Barometer 1/2025

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