

TRAVEL HORIZONS 2024

FAMILY EDITION

Data-driven insights from lastminute.com's and Forward's travel experts to understand the modern family booking trends

lastminute.com



INTRO

We understand our audiences through surveys, research, data and insight - but also emotionally as our fellow human beings.

Family holidays give us memories and moments to cherish, years after the suntan fades. You probably won't remember your first family car or a new sofa, but you'll certainly remember your baby's first feeling of sand between their toes and the surprise of cold sea water covering your ankles.

Although now we mainly book online and travel with our tiny computers and cameras in our pockets, if a family from the 1980s was suddenly transported onto a beach package holiday in 2024 with lastminute.com they would be looking for the same things. The right price, fair-weather location, pool/beach, children's activities and somewhere for the parents and grandparents to relax when the sun goes down.

Helping families create connected and fuss-free trips has to be a key focus for any holiday provider. Families tend to be the biggest forward planners, with nearly 50% booking between 5 to 12 weeks in advance of travel, however, OTAs are also a great gateway for those who had thought about staying at home but have then seen the weather forecast.

Now families don't have to decide where they want to go this summer from a brochure in January, instead, they can wait and see which destinations offer the most bang for their buck in July and August. The protection of packages, but with the flexibility to fly from anywhere to anywhere, and choose how long you want to stay sets us apart.

One thing though that hasn't changed from the 1980's... The European love of Spain and especially the beaches of the Balearic Islands. Although this year it's the twin T's of Turkey and Tunisia who might have something to say about that.



Luca Concone
CEO of lastminute.com

A photograph of a family of three (a child, a woman, and a man) walking along a beach at sunset. They are silhouetted against the bright orange and yellow sky. The sun is low on the horizon, creating a long, shimmering reflection on the wet sand. The sky is filled with soft, wispy clouds. The overall mood is peaceful and romantic.

THE ULTIMATE FAMILY ESCAPE

TRAVEL HORIZONS
Family edition

SUN AND BEACH WITHIN EASY REACH

Top 10 family destinations

Majorca translates as the Big Island, and that's handy as it remains the undisputed Monarch of the Summer Months. It's still the top destination for European holidays, especially for families travelling with kids.



But wait a minute, this year the desire for warm weather, great resorts, and attractive deals has seen a surge in bookings for Turkey and the northern coast of Africa - particularly Tunisia, Morocco and Egypt.

Classic City Break destinations, London, Rome and Paris remain the bucket-list favourites.

EU*
2024

- 1- Majorca
- 2- Marrakech
- 3- Tenerife
- 4- Antalya
- 5- Crete
- 6- Sharm El Sheikh
- 7- London
- 8- Lanzarote
- 9- Barcelona
- 10- Hurghada



DE
2024

- 1- Majorca
- 2- London
- 3- Turkish Riviera
- 4- Crete
- 5- Barcelona
- 6- Hurghada
- 7- Istanbul
- 8- Rome
- 9- Paris
- 10- Tenerife



ES
2024

- 1- Tenerife
- 2- Majorca
- 3- Gran Canaria
- 4- Lanzarote
- 5- Rome
- 6- London
- 7- Fuerteventura
- 8- Menorca
- 9- Paris
- 10- Disneyland Paris



FR
2024

- 1- Marrakech
- 2- Majorca
- 3- Crete
- 4- Hammamet
- 5- Turkish Riviera
- 6- Hurghada
- 7- Sousse (Tunisia)
- 8- Lanzarote
- 9- Tenerife
- 10- Djerba



UK
2024

- 1- Turkish Riviera
- 2- Tenerife
- 3- Majorca
- 4- Marrakech
- 5- Paris
- 6- Algarve
- 7- Barcelona
- 8- Rome
- 9- Dubai
- 10- Lanzarote



IT
2024

- 1- Sharm El Sheikh
- 2- Majorca
- 3- Paris
- 4- Barcelona
- 5- Tenerife
- 6- Crete
- 7- London
- 8- Hurghada
- 9- Menorca
- 10- Sicily

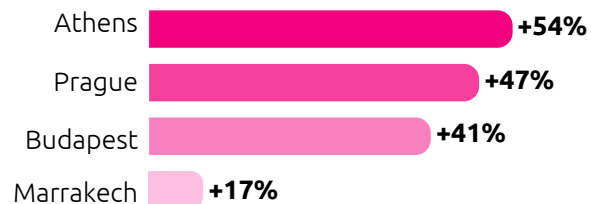


FAMILY-FRIENDLY DESTINATIONS ON THE RISE

EUROPE OVERALL*

Following the terrible earthquake that struck Turkey in 2023 and the subsequent drop in sales, we can reveal a huge increase in bookings with Istanbul and Antalya.

Family City Break destinations on the rise:



SPLIT BY COUNTRY



UK

Destinations on the rise

Turkish Riviera, Marrakech, Istanbul and Athens.

☆ New Entries**

Hurghada, Egypt, Orlando, Florida and New York.



FR

Destinations on the rise

Turkish Riviera, Sicily, Istanbul, Cyprus and Corfou.

☆ New Entries**

Djerba in Tunisia.



DE

Destinations on the rise

Istanbul, Sardinia, Berlin and Sicily.

☆ New Entries**

Hurghada in Egypt.



IT

Destinations on the rise

Maldives, Budapest, Hammamet, Dubai and Istanbul.

☆ New Entries**

Abu Dhabi, Kos and Zanzibar.



ES

Destinations on the rise

Madrid, Amsterdam, Prague and Berlin.

☆ New Entries**

Cambrils in Spain.

*data comparing the increase in bookings in 2024 vs 2023

** destinations that have entered the top 100 this year

ISLANDS IN THE DREAMS FOR 2024

Top 10 cheapest* destinations for summer holidays with the fam

EUROPE 2023*	EUROPE 2024**
Paris	Sharm El Sheikh, Red Sea
London	Malta
Disneyland Paris	Gran Canaria, Canary Islands
Rome	Corfu, Greek Islands
Barcelona	Sicily
Menorca, Balearic Islands	Majorca, Balearic Islands
Malta	Tenerife, Canary Islands
Ibiza	Marrakech
Sharm El Sheikh, Red Sea	Fuerteventura, Canary Islands
Majorca, Balearic Islands	Costa Brava

The charms of Sharm are so far taking the top spot in where Europeans are heading this summer, rocketing up from 8th place last year. Egypt has invested in new hotels and leveraged its unparalleled history by opening new museums and restoring ancient sites.

*destinations with the lowest GTV based on 7 nights length of stay during August school holidays.

**April and May to date bookings 2024 based on bookings departing in July and August 2024: the cheapest sun and beach destinations (by GTV average and 7-night stay).

Last year Paris (along with its Disneyland Park) was top of the picks - but with the Olympics taking place it's dropped out of this year's top ten along with other city break destinations like London, Rome and Barcelona.

For 2024 we're back to beaches with a bang - and it's Islands that have caught the eye. Malta was once a bit of a secret budget escape for those wanting a unique combination of Italian, North African and British in their holiday mix - it looks like the cat is out of the bag as it leaps from no 7 in 2023 to no 2.

Spain has 5 of the top 10 cheapest destinations so far this year, with Greece and Italy getting an island each (Corfu and Sicily).



FOCUS ON TOURS

Our packaged tours offer highlights:

GERMANY

- Majorca & Faro for 3* & 4* star hotels
- Antalya, Bodrum, Izmir, Monastir and Varna for 5* star hotels

FRANCE

- Djerba, Lanzarote and Tunis for 3* & 4* star hotels
- Sousse, Hammamet and Bodrum for 5* star hotels



CORFU



WHEN YOUR
FAMILY HOLS ARE
“A LITTLE LASTMINUTE.COM”

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Top last-minute locations for family holidays*

There are super planners and those who leave it late. Regarding holidays, fantastic options will always be available whenever you book - especially if you are flexible on destination.

But sometimes you just need that spontaneous escape from the routine with the people you love the most - so here are the data-driven top picks for families when travelling last minute:

- 1 Majorca, Spain
- 2 Antalya, Turkey
- 3 Barcelona, Spain
- 4 Crete, Greece
- 5 Paris, France
- 6 Tenerife, Canary Islands
- 7 Lanzarote, Canary Islands
- 8 Menorca, Balearic Islands
- 9 Sharm el Sheikh, Egypt
- 10 Faro, Portugal - NEW ENTRY

*data referring to bookings with lead time 0-7 days in 2023

CRETE



Spontaneous trips
65%
of summer bookings
are made within
6 weeks of travel

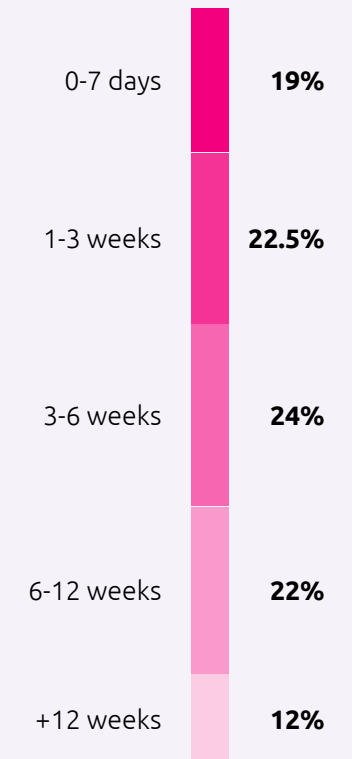


FARO

Are families more proactive planners or last minute deal seekers?

Europeans tend to be a steady bunch of people who know when and where they want to go. But maybe, just maybe, we're all letting go a little. But when summer comes, even European families seem to be more keen to take that last-minute deal: in 2023, the majority of summer bookings (June to September) were for trips departing within six weeks to the same day of booking.

Families' booking windows



SPECIAL FOCUS

WHAT HAPPENS ON TOURS...

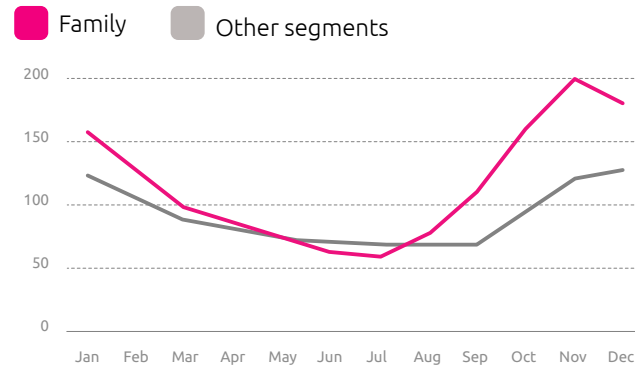
Germany and France are the biggest market for Tour Operator (TO*) package holidays - so in these countries we offer these more traditional travel services alongside Dynamic Package Holidays.

DE

Germans book their holidays way more in advance than the rest of Europe, often as soon as Winter sets in, and they also tend to book longer stays, planning for their Easter and summer holidays, with an average stay of 9.5 days.

This means for them the average length is slightly lower in the summer months - 8.5 days - for families' booking at the last minute.

How many days in advance do Germans book on average?

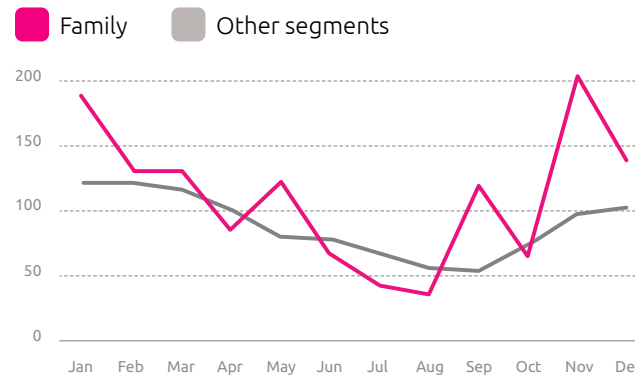


FR

The French are typically more laissez-faire when it comes to booking a last-minute deal, especially in comparison with the Germans in the summer.

While in other countries people are taking more multi-trip breaks, the French still book for longer stays (average 7.8 days) - making the most out of a summer holiday.

How many days in advance do French book on average?



*data referring to 2023 booking of TO holidays



TOP SEARCHES FOR FAMILY HOLIDAYS

We wanted to discover what families were (hide and) seeking this summer. Who has their beady eye on Bora Bora, which country has a spike in single-parent holidays and who is hearing the siren call of Cyprus? Here are their holiday inspiration trending searches from asking Alexa to consulting Google.

UK

- **For Brits, there's no place like home:** most family searches are for national travel, with Cornwall, Devon, Scotland, and Wales as the most wanted destinations.
- When it comes to **international holiday inspiration, family searches focus on the Mediterranean** with Spain, Italy, Greece, and Portugal at the top of wishlists. But Cyprus is catching the eye!

DE

- **Germans are all in for "all-inclusive":** especially if it's in Egypt and Turkey (+177%, +100% YoY).
- **Bora Bora seems to be the real dream destination for German families** (searches "flights to Bora Bora" grew by 132%). But they also seem to be wary of the high price, as proved by the follow-up with +46% searches for "cost of a Bora Bora holiday".

*data based on Google searches in the past 12 months

CORNWALL



BORA BORA



ITALY



THAILAND



IT

- Searches for **"single parent holidays"** are **evidently on the rise** in Italy +82%.
- As inflation persists, the search for **"budget-friendly holiday destinations"** intensifies (+88%).
- How about a relaxing break in the mountains? The average trend for **"mountain holidays"** is **+12%**. The past year also saw requests for the typical winter break "settimana bianca" rise +40%.

FR

- Oo la long haul - **Thailand is the real trend of this year** (Q1 2024): French families searching for destinations in Thailand grew by +106% in Q1 2024.
- Going on holiday is always a key priority for the French, but better make it affordable: searches for **"Cheap family holidays"** grew by +50% this year.
- **"All-inclusive family holidays"** +49% YoY Q1 2024.

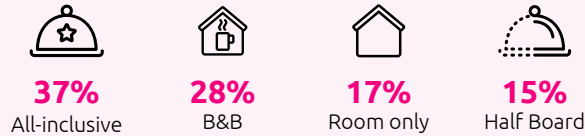
TOP TRENDS IN FAMILY HOLIDAYS



How long are families travelling for?



Where are families staying when on holiday?



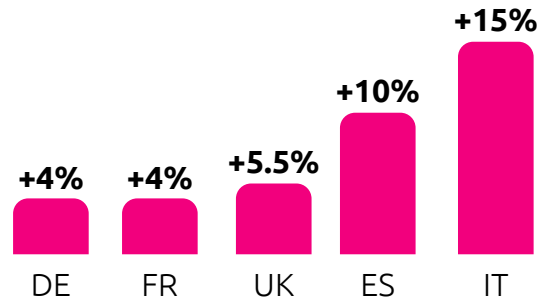
Are family holidays becoming more expensive?

The short answer is yes - along with the price of fuel, olive oil, coffee... the list currently goes on. But while we might cut back on some luxuries, one essential that survives everything the economy can throw at us is the humble holiday.

We all need that time away with our families to recharge and do something different.

In Europe the overall average booking value for 2024 family holidays is +9% YoY.

Average booking value for family holidays split by market:



The most indispensable amenities every family holiday must include

When travelling with the kids, comfort always comes first. And booking a place where everything's at your fingertips, be it the pool, the restaurant, or the beach, becomes a must. Here's the most wanted amenities:

- Kids Club
- Kids play area/pool
- All-inclusive dining option
- Hotels/ apart-hotels with separate rooms for kids
- Centrally located, near the beach, water park

*data referring to bookings made in 2024 year-to-date



SPECIAL FOCUS

FAMILIES SETTING SAIL

Cruise holidays are making waves in popularity

+10% 2023 vs 2022

+13% first quarter of 2024, compared to the same period the previous year

Where are families cruising to?

Top Cruises are sailing the Western Mediterranean (+17% Q1 2024 YoY), and the Greek islands (+18%).

Cruises are getting younger

The average age of Cruise passengers is decreasing more and more: from 30/31 in 2023, to 28/29 in the first quarter of 2024.



FAMILIES
SETTING SAIL
+10%
YoY

*data referring to the period from 2022 to 2024 year-to-date

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Family edition

crocierissime

SPECIAL FOCUS

HOTELS

Room Services - Family-friendly hotels and locations

When booking hotels for the family some of the biggest chains have specific services to suit children. So before you say - "they didn't have this when I was a kid" ... be safe in the knowledge that a happy child is a happy holiday! Here are our expert's two top picks.

NH

They have a series of "Families, Welcome" hotels in loads of destinations like New York, Berlin and Amsterdam.

- Child-friendly hotels with family-friendly rooms and a family assistant upon check-in
- Currently offering free accommodation for children up until 1st June (t&c's apply)

Melia

Heading to Spain or Mexico? - then Melia has your kids covered.

All-inclusive hotels for children with child-friendly amenities, specialised food menus as well as a family concierge.

*data referring to 2024 insights year-to-date



GREECE IS THE WORD

We make no Apollo-gies in saying Greece is the most family-friendly country on earth. So if you haven't been - it's Feta late than never!

The top 3 most sought-after destinations (and the cheapest)

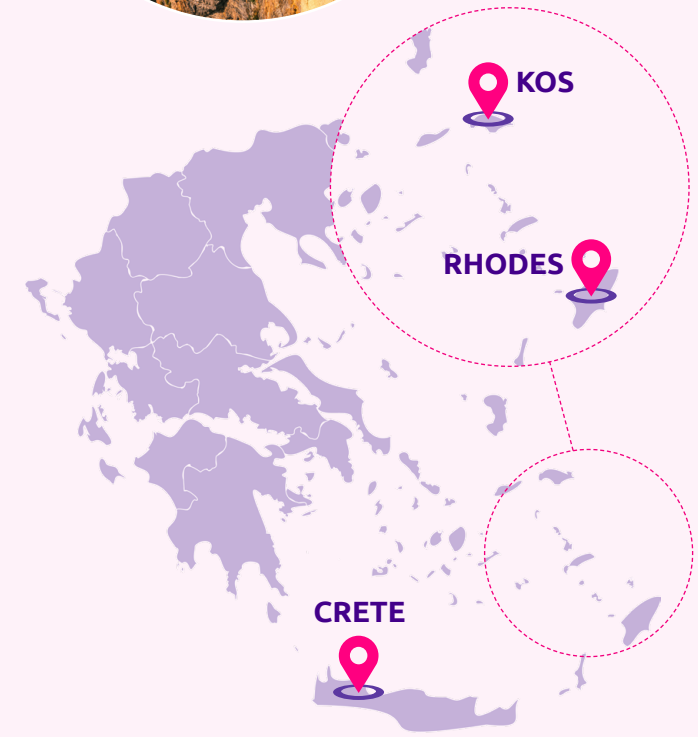
1. **Crete** can't be beat. The fifth biggest island in the Mediterranean and by far the most popular.
2. All **Rhodes** lead here. Incredible beaches and it's also a UNESCO heritage site, something for all the family.
3. Why Greece - just Be-**Kos**. There are loads of family activities available on this island with incredible views.

Our best Greece budget tips

Our customers are always looking for two things, convenience and savings. Check if the hotel has a beachfront location or proximity to the sea to go with the pool. Some have free sunbeds on the beach which can make a difference if you want to spend the day there in comfort. Other key factors to consider are if they are near waterparks and have a kids club.

The average length of stay

The average for visitors is around 6 nights but lastminute.com families are staying on average for 7.3 nights.



FAMILIES FUTURE ADVENTURES

Creating a bucket list helps us all dream about holidays year-round. Our recent UK survey found that almost 60% of families have one, showing just how much we love planning future adventures.

Here is a top 10 of the most popular and dreamed of destinations in the bucket list of British families.



Go up the Empire State Building



Visit Pompeii in Italy



Explore the Valley of the Kings in Egypt



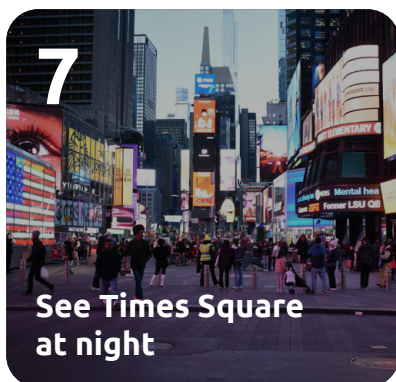
See the Northern Lights in Reykjavik



Swim in the crystal-clear lagoons in the Maldives



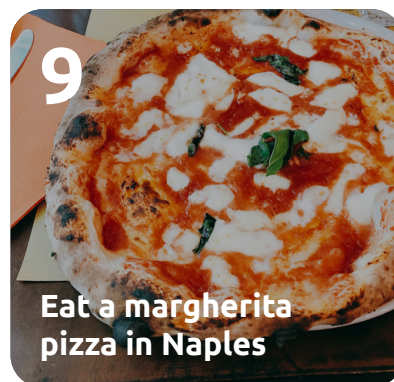
Swim the Great Barrier Reef in Australia



See Times Square at night



See the Sistine Chapel in Vatican City



Eat a margherita pizza in Naples



Island hop in Greece

*consumer survey by Perspectus Global for lastminute.com of 2,019 respondents (age 18 - over 60) from across the UK

PRESENTING

FORWARD TRAVEL INTELLIGENCE UNIT

Who is Forward?

Forward is the media/marketing powerhouse born from lastminute.com that offers digital integrated marketing campaigns for travel, to accelerate tourism worldwide.

What is the Travel Intelligence Unit?

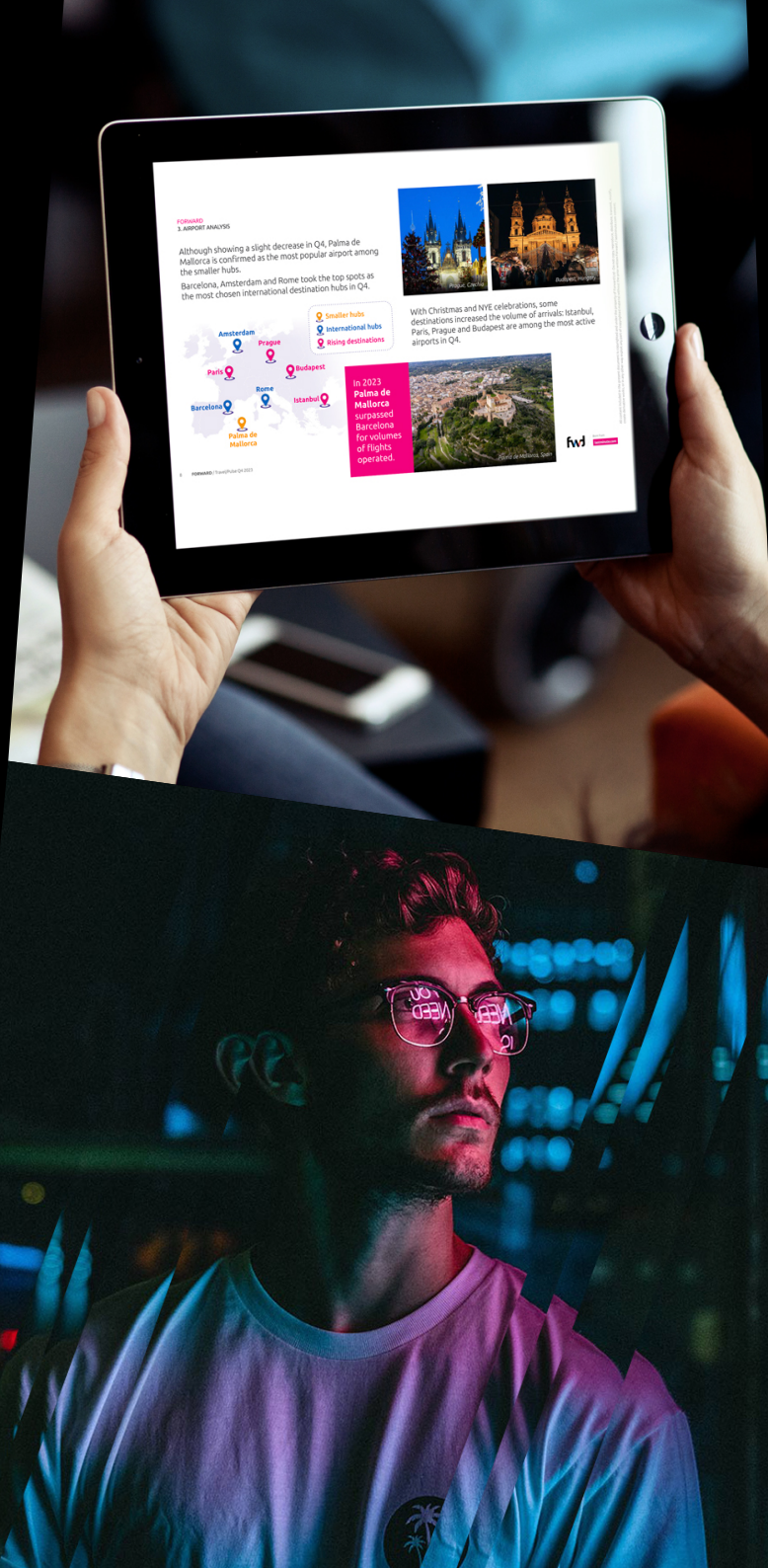
Travel Intelligence Unit is the cross-departmental team at Forward aimed at capturing, analysing and interpreting first-party travel data coming from lastminute.com's market-leading OTA and META websites.

It combines the latest data science techniques to help make better, more informed, timely marketing decisions to navigate an ever-changing and increasingly complex travel landscape.

Discover more

thisisforward.com/travel-intelligence-unit

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Family edition



Data Methodology

This travel report has been generated by collecting and analysing first-party search intent and audience data sourced from the lastminute.com network of websites.

It focuses on outbound travel from core European countries across multiple travel products and data dimensions. It covers up to 2023 and shares essential data and trends affecting travel intent from Europe, specifically analysing families.

fwd

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