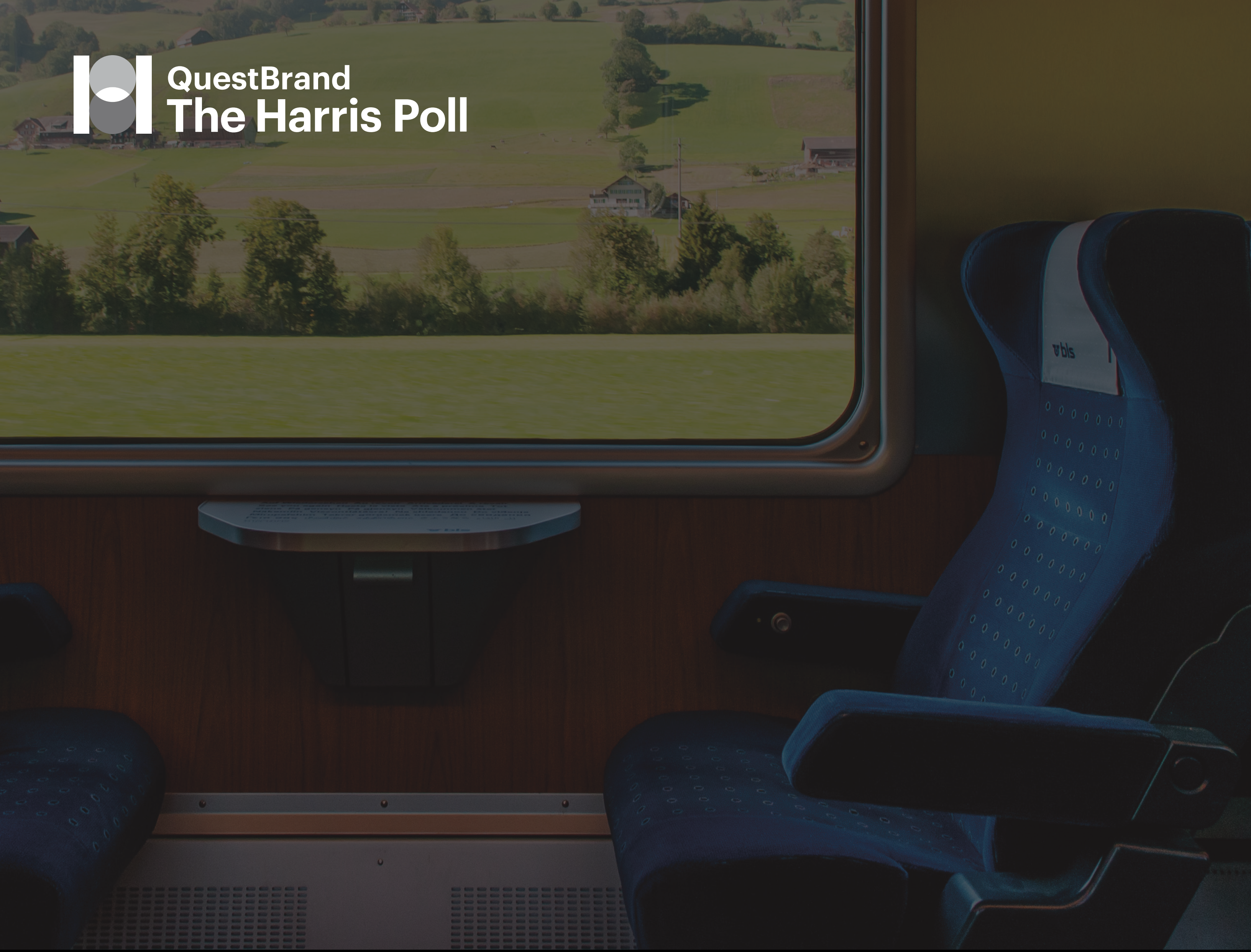
QuestBrand
The Harris Poll



European Travel Trends

A look into how German and British consumers are planning to travel in 2025.

You may have heard that Europe's tourism industry benefited from a strong 2024, with more foreign travelers flocking to Europe in the first quarter of 2024 than in Q1 2019. While this marks an important milestone for Europe's post-COVID economic recovery, we are diving into the European travel trends a bit closer to home.

Throughout this report, we employ survey data from QuestBrand's Custom Questions functionality to explore how British and German consumers plan to conduct their personal travel in the year ahead.

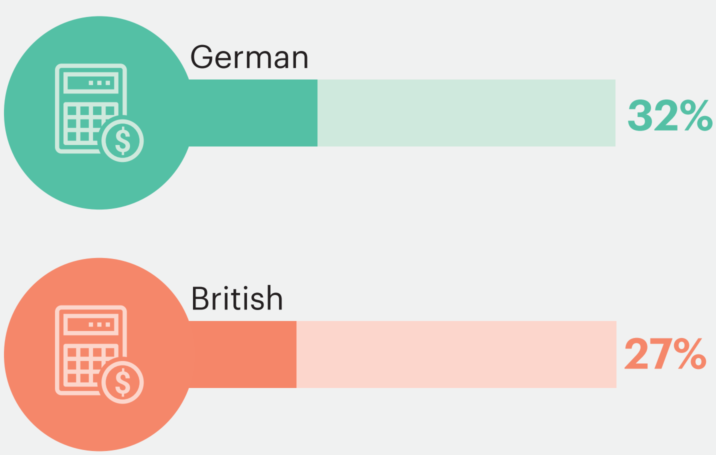
After reading the report, you will understand what factors influence how German and British adults travel, and what these groups prioritize from the travel experience.

PERSONAL TRAVEL GETS A GREENLIGHT IN 2025, BUT TRAVELLERS ARE MINDFUL OF BUDGETING

2025 promises to be a strong year for personal travel (e.g., holiday, event, destination remote work) with **70% of British and 64% of German adults at least somewhat likely to take a personal trip**. In fact, 39% of British and 27% of German adults agree that they **plan to travel more in 2025 than they did in 2024**.

Travel excitement runs high, but cost remains at the forefront of travellers' minds. Four-in-10 British (44%) and German (37%) adults agree that **cost is the most important factor when travelling for personal purposes**. About a third of both German (32%) and British (26%) adults agree that they **typically set a firm budget for their personal travel**. But that doesn't mean these consumers aren't willing to open their wallets - 26% of British and 22% of German adults agree that **they would rather spend their disposable income on travel than on material possessions**.

I typically **set a firm budget** for **personal travel**.



Figrue 1. QuestBrand. Base: UK adults, n=3,080. Base: German adults, n=2,014. R_Q7305r3: I typically set a firm budget. - Which of the following statements about traveling for personal purposes do you agree with?

WHERE ARE TRAVELLERS EXPLORING IN THE NEXT YEAR?

Most British and German travellers will not be going too far afield. **A significant portion of 2025 travellers are taking trips within their home country** (50% British, 40% German).

Those stepping beyond their country's borders are most often sticking to Europe: another country in **southern Europe** (38% German, 28% British), **northern Europe** (16% British, 15% German), **eastern Europe** (17% British, 13% German), or **western Europe** (28% British, 20% German).

Those travelling outside Europe are most often travelling to **North America** (18% British, 10% German), **Asia** (12% British, 12% German), **Africa** (10% British, 8% German), **Oceana** (7% British, 3% German), and the **Middle East** (7% British, 4% German).

Which **methods of transportation** are you likely to take to get to your **travel destinations**?

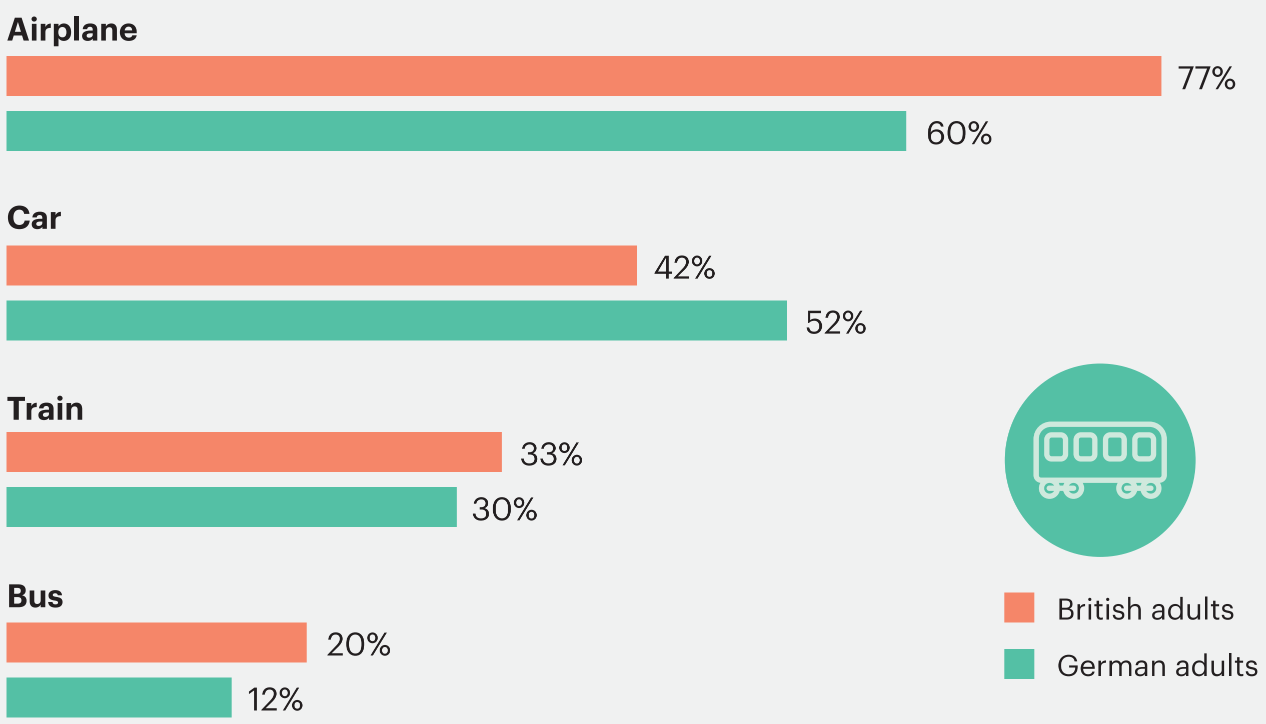
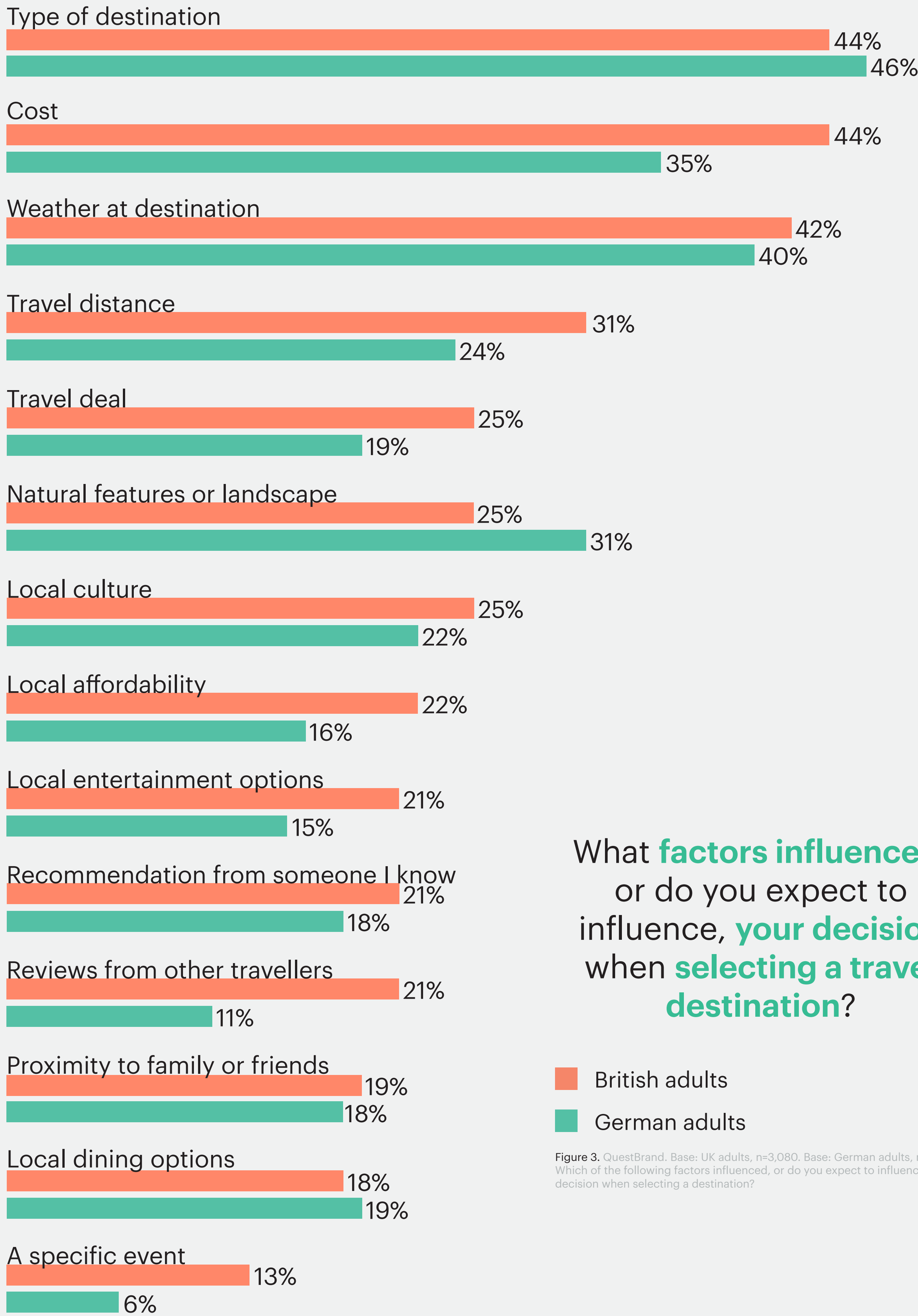


Figure 2. QuestBrand. Base: UK adults, n=3,080. Base: German adults, n=2,014. Which of the following methods of transportation are you likely to take to travel to the destination(s) you are likely to travel to for personal purposes in 2025?

WELCOME TO THE FRIENDLY SKIES

While most British and German travellers aren't straying too far from home, **travelling by airplane** (77% British, 60% German) takes first place for intended travel methods. After air travel, **Europeans are taking to their cars** (52% German, 42% British), **trains** (33% British, 30% German), or **the bus** (20% British, 15% German). Very few travellers (12% British, 4% German) are **relying on boats** to reach their final destination.

WHEN SELECTING A DESTINATION, TRAVELLERS ARE MOST OFTEN INFLUENCED BY THE TYPE OF DESTINATION & THE COST



What **factors influenced**, or do you expect to influence, **your decision** when **selecting a travel destination**?

British adults

German adults

Figure 3. QuestBrand. Base: UK adults, n=3,080. Base: German adults, n=2,014. Which of the following factors influenced, or do you expect to influence, your decision when selecting a destination?

TRAVELLERS ARE ANTSY TO PLAN THEIR HOLIDAYS

Travellers are not leaving their holiday plans to chance. **The majority** (72% British, 63% German) **typically prefer to coordinate travel as soon as they know that they are taking a trip**. Only one-in-10 (11% British, 11% German) respondents usually **puts off coordinating their travel until the last minute**. However, the amount of effort that travellers put into their trip is also trip-dependent - 19% German, and 16% British adults agree that **their approach to coordinating travel depends on the destination** (e.g., distance, travel restrictions).

For the most part, British and German travellers trust their own instincts when planning a holiday away. When deciding on a travel location, **only one-in-five get a recommendation from someone they know** (21% British, 18% German), or check out **reviews from other travellers** (e.g., online, in a travel book) (21% British, 11% German). For the rest of the planning process, 23% of German and 20% of British adults **typically consult with someone knowledgeable** (e.g., travel planner, input from a local) **when planning trips**.

I usually prefer to **coordinate my travel as soon as I know** I'm taking a trip.

Figure 4. QuestBrand. Base: British adults, n= 3,080. Base: German adults, n=2,014. R_Q7303r1: I usually prefer to coordinate my travel as soon as I know I'm taking a trip. - Which one of the following best describes you when coordinating travel (e.g., transportation, lodging) for personal trips?

IT'S OKAY TO BE A TOURIST

The "Tourist" label is often accompanied by a long list of unflattering adjectives. However, the majority of British and German adults are not concerned about being recognised as a short-term visitor. **Less than a quarter** (22%) **of Germans, and only 12% of British agree that they don't want to come across as a tourist**. Similarly, **less than two-in-ten** (15% British, 15% German) **respondents agree that it's important to them to live like a local while on holiday**. We hope all travellers embrace their time away from home in 2025, and enjoy being a tourist for as long as possible.

HOW DO BRITISH CONSUMERS THINK ABOUT THREE OF THE UK'S LEADING AIRLINES?

Every brand has its own personality - characteristics that set it apart from the competition. **Using QuestBrand's Perceptual Mapping functionality, we dug into three airlines popular with British travellers - British Airways, Jet2.com, and TUI** - to see how each of these brands have carved out a space in the airline industry. QuestBrand compares the airlines across 25 emotional attributes to uncover which traits consumers most often ascribe to each brand.

PERCEPTUAL MAP OF AIRLINE CARRIERS AMONG UK ADULTS

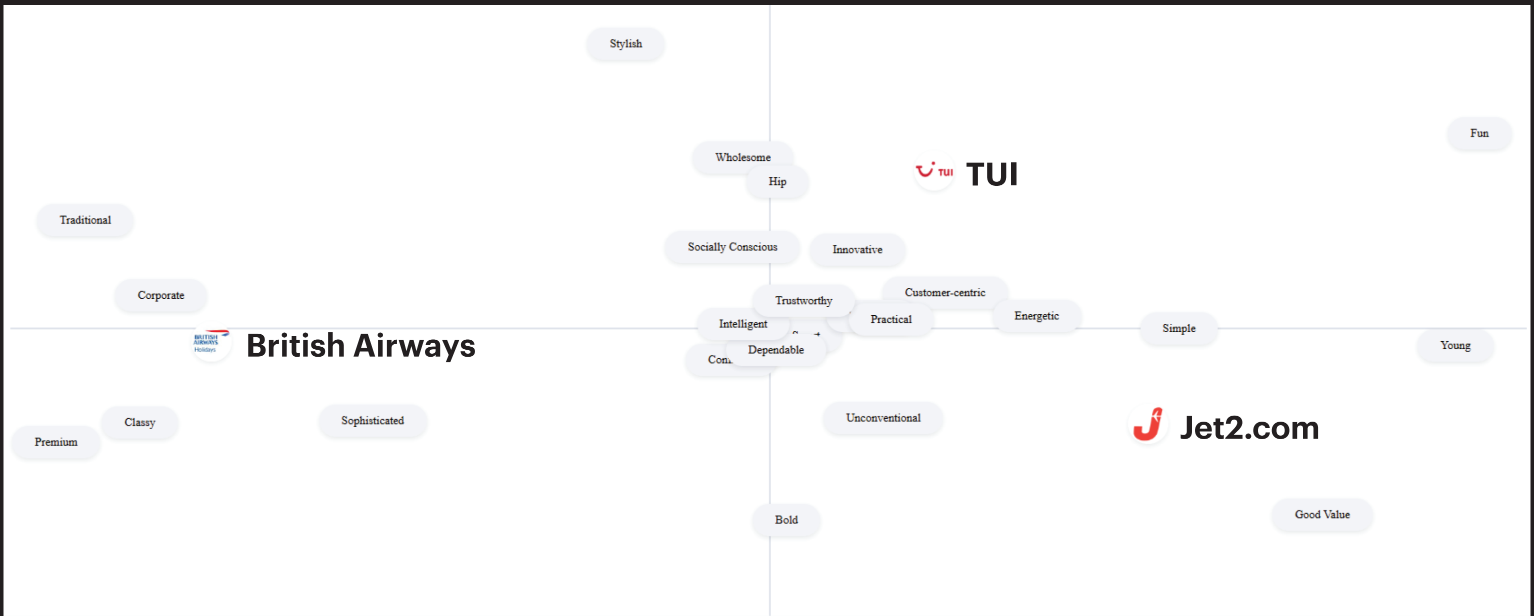


Figure 5. QuestBrand. 7/1/24-1/12/25. Base: General population of UK adults. British Airways, n=1,405. Tui, n=1,147. Jet2.com, n=1,047.

British Airways owns the luxury space, most often associated with the terms "**Sophisticated**," "**Classy**," "**Corporate**," and "**Premium**." This comes as no surprise, especially after seeing British Airways' **First class reveal** in November. Their newly redesigned First class cabin brings modern luxury to the travel experience. British Airways is the only European air carrier that offers First class travel from London to the US. The brand is also known for offering high-end package holidays, and they **have invested £7 billion** (and rolled out more than 120 initiatives) **to improve the customer experience**.

Jet2.com, the UK's third largest airline, has carved out an identity as being a "**Good Value**," "**Simple**," and "**Unconventional**." **Jet2.com has thrived as a low-cost carrier with the slogan "Friendly Low Fares."** They also offer budget-friendly package holidays. The airline is **known for its strong customer service**, and has won a **number of awards.** Three years in a row, Jet2.com has won the ***Which? Travel Brand of the Year*** award.

TUI owns the attributes of "**Innovative**," "**Hip**" and "**Customer-centric**." While also an airline, the TUI brand is better known for its many travel services including tours, cruises, and holiday package deals. The TUI name is often associated with innovation due to their strong embrace of new technology. With the launch of **AI Lab**, TUI has worked to integrate AI use throughout the company. In 2023, the airline fully deployed **SITA OptiClimb** to improve the company's sustainability efforts. With this technology, TUI has been able to save up to 200kg of fuel per aircraft per day.

LONG POPULAR WITH BUSINESS TRAVELLERS, LUFTHANSA IS LOOKING FURTHER AFIELD FOR FUTURE GROWTH

COVID-era shutdowns and work-from-home culture hit German airline Lufthansa particularly hard. Pre-COVID, the airline [relied on corporate travel] more so than the other European airlines. We can still see Lufthansa's heightened popularity with German business travellers in the airline's QuestBrand sales conversion funnels. A sales conversion funnel tracks customers through the purchase journey, from initial brand awareness to purchase and recommending the brand to others. **Lufthansa's "usage"** (i.e., consumers who purchase tickets with the airline) **is highest among Millennials** (44.1) **and Gen X** (43.6) **the generations with the highest likelihood of travelling for work**.

Since business travel has not returned to 2019 levels, Lufthansa is looking further afield for growth. **The airline is looking to expand into newer regions, including** [Latin America and Africa]. Even if business travel never returns to pre-pandemic levels, we bet that this premium airline will find a new niche traveller to support.

LUFTHANSA - SALES CONVERSION FUNNEL BY GENERATION

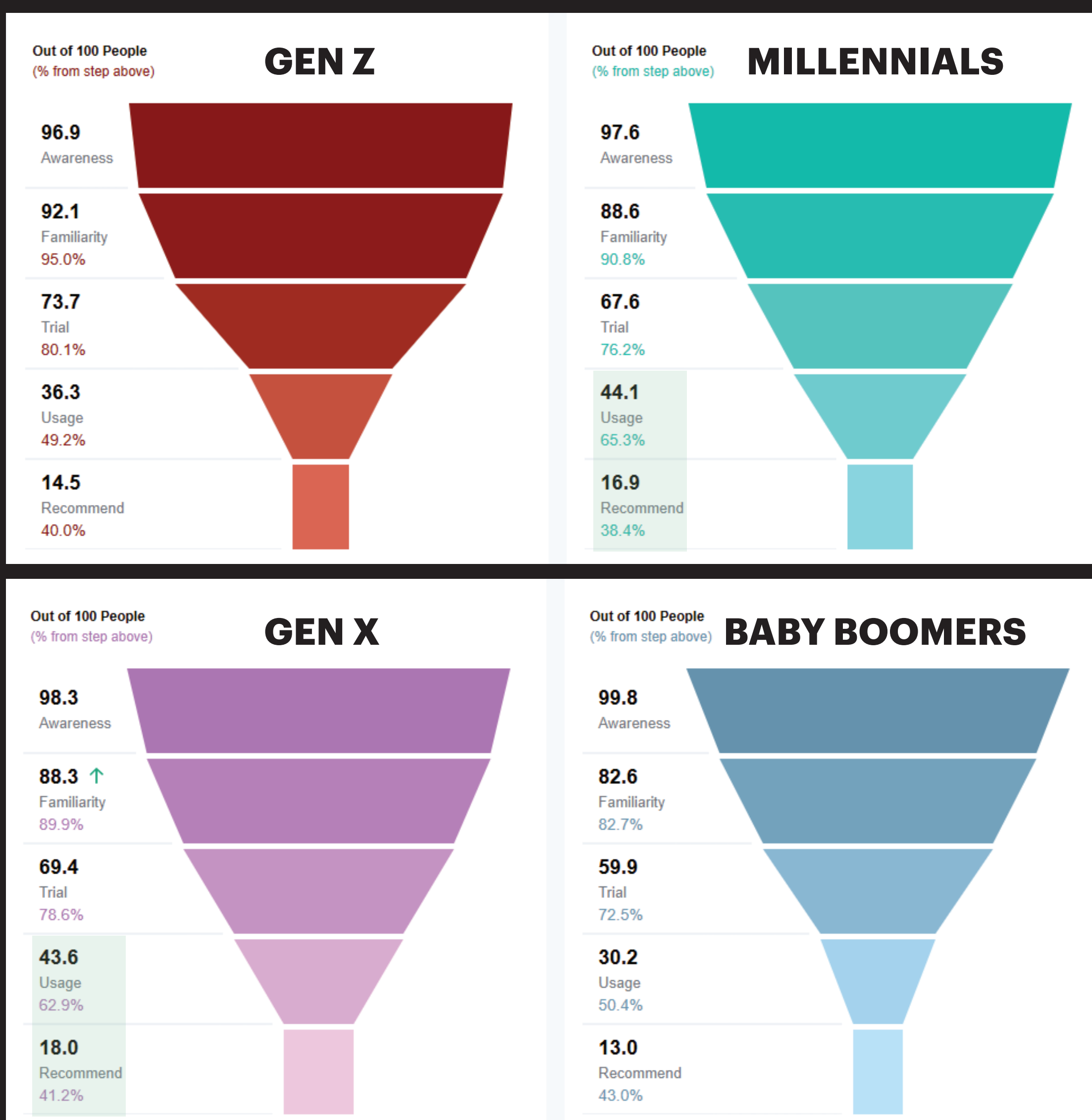


Figure 6. QuestBrand. 8/1/24-1/12/25. Base: German adults: Gen Z, n=166. Millennials, n=341. Gen X, n=372. Baby Boomers, n=480.

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