

TRAVEL HORIZONS 2026

**Shifting Seasons and
Experiences That Matter**
New Trends Shaping Travel

lastminute.com



EXECUTIVE SUMMARY

European travel remained in robust health in 2025 with **departures growing 8% year-on-year** across lastminute.com's core markets (UK, France, Germany, Italy and Spain), and early 2026 data shows continued momentum (January +17%, February +6% YOY), with demand shifting rather than declining, despite geopolitical uncertainty influencing destination choices. Behind the headlines, we've crunched the numbers to show **the ways consumers plan and experience their holidays are quietly evolving** for the year ahead:

SHIFTING SEASONS



Shoulder season trips now account for nearly **one in four of all departures** in lastminute.com's core European markets (the UK, France, Germany, Italy and Spain).

It isn't just post-summer **trips** in vogue – travellers are looking outside the traditional summer break to go at **different times of the year**.

January and February are seeing departure growth, and more travellers anchor their trips to key moments in the calendar, such as public holidays, maximising time away without extending their annual leave.

ICONIC ESCAPES



Rather than travelling solely for rest or routine leisure, **travellers are increasingly mobilised by milestone events and iconic moments**. These are often short, focused trips - the UEFA Champions League Final, for instance, drove a 38% year-on-year rise in departures to Munich.

These "Golden Globetrotters" demonstrate how travellers are increasingly willing to pack their suitcases for brief getaways to attend events that truly matter.

THE GROWTH HOTLIST



An evolving **2026 geopolitical situation** led travelers to **favour certain destinations**: Italy to Sicily +30%, the French - Lanzarote +57%, the Germans, the Costa del Sol +76%, Spain to Malta +238%, and the Brits, the Costa Blanca +30%.

In 2025, travellers' radars switched to the Baltics and Eastern Europe, with Gdansk, Bucharest and Kraków standing out as 'rising stars', reflecting a **growing focus on experiences, affordability, and less-crowded escapes**, seeing travellers turn to our quiet climbers or more affordable spots.

SMART SPEND TRAVEL



People are increasingly focused on curating their trips so they can maximise spending on what matters most to them.

In 2025 it was a case of "Hand luggage, High Thread Count" as 72% of **4+ star hotel bookings** on the platform were paired with a **low-cost carrier**, a 12% increase year-on-year.

14% year-on-year increase in the **number of customers who added at least one ancillary service at checkout for comfort** (e.g. baggage, transfers).

Methodology *The data in this report is based on traveller departures from five core European markets – the UK, Italy, France, Germany, and Spain – using lastminute.com's Dynamic Holiday Packages (DP) throughout 2025. January, February and March data for 2026 followed the same methodology.

SHIFTING SEASONS

The year saw rising departures aligned with major calendar occasions. However, perhaps surprisingly, it wasn't the summer public holidays that acted as the greatest growth accelerators.

WHEN THE CALENDAR CALLS

VALENTINE'S WEEK

+41%

Romance was on the rise with Valentine's week seeing a 41% year-on-year rise in France, 32% increase in Italy, 26% in Spain, and 21% in Germany.

EASTER WEEK 2025

+33%

This trend was driven by impressive growth in France, up 154% due to Easter coinciding with its Spring Break. Italy +40% also saw a boost.

An early 2026 Easter in the UK saw +18% year-on-year growth. It's fortunate that Majorca means Big Island as it was no1. across the board for departures.

LABOUR DAY WEEK

+78%

Elsewhere, in May 2025, Labour Day Week lived up to its name and drove a 78% year-on-year rise for Italy.



SUMMER BEYOND SUMMER

Shoulder season trips now account for one in four of all total departures in lastminute.com's core European markets of the UK, France, Germany, Italy and Spain.

The fact that the majority (55%) of shoulder season's trips are beach breaks, seems to prove holidaymakers are still choosing to enjoy sun, sea and sand - but at a calmer, more affordable time of year. Breakout beach experiences without the peak-season pressure.

+7% SEPTEMBER

+12% OCTOBER

+23% NOVEMBER

...and the trend continued into **December, with a +22% year-on-year** increase.

SEASON WINNERS FOR 2025

- 1 Majorca, Spain
- 2 Tenerife, Spain
- 3 Crete, Greece
- 4 Amsterdam, The Netherlands
- 5 Barcelona, Spain
- 6 Rome, Italy
- 7 Marrakech, Morocco
- 8 Malta
- 9 Paris, France
- 10 Sharm El Sheikh, Egypt

(ranking shows % increase in 2025 vs. 2024)



JANUARY JETSETTERS & FEBRUARY FLYERS 2026

Travel off the peak season shows no sign of slowing down and continues into 2026. January departures* rose 17% compared to 2025, and February 6 per cent, as travellers look for an early-year escape, taking advantage of lower prices and lighter crowds than during the Christmas period.

+17%

MOST POPULAR

- 1 Rome, Italy
- 2 Amsterdam, The Netherlands
- 3 Tenerife, Spain
- 4 Paris, France
- 5 Marrakech, Morocco
- 6 London, UK
- 7 Barcelona, Spain
- 8 Prague, Czech Republic
- 9 Budapest, Hungary
- 10 Sharm El Sheikh, Egypt



*departures from lastminute.com's core markets (UK, France, Germany, Italy and Spain).

ICONIC ESCAPES

Travellers are increasingly motivated to pack their suitcases and travel to attend events that truly matter to them. Two standout peaks of event-based tourism last year came from sport and music.

RADIOHEAD CONCERT

London, 21-25 November 2025*

- 30% year-on-year increase in departures towards London
- 27% week-on-week increase
- 11% above London's 2025 average weekly volume
- Average length of stay 10% shorter than the city's 2025 weekly average

*2025, Week 22

UEFA CHAMPIONS LEAGUE FINAL

Munich, 31 May 2025*

- 38% year-on-year increase in departures to Munich
- 69% week-on-week increase
- 13% above Munich's average 2025 weekly volume
- Average length of stay down by 11% vs the 2025 weekly average

*2025, Week 47

*Data extraction for both events was taken looking at departures during week 22 in 2024 and 2025 for Champions League Final and during week 47 in 2024 and 2025 for Radiohead Concert.



THE GROWTH HOTLIST

In 2025 a balance of experience, **affordability and fewer crowds**, increasingly shaped travellers' choices, with "quiet climbers" and value-driven destinations on the rise. However, this underlying trend was briefly overlaid in March 2026 by geopolitical developments in the Middle East, which redirected **demand towards alternative destinations**. Here are the destinations gaining momentum on the travel radar.

THE IMPACT OF THE MIDDLE EAST CONFLICT

1	Spain to Berlin	+129%
2	France to Seville	+100%
3	Germany to Rome	+40%
4	UK to Copenhagen	+35%
5	Italy to Sicily	+31%

*March 2026 bookings for summer 2026 (June-August)



EUROPE RANKING 2025

1	Gdansk, Poland	+97%
2	Bucharest, Romania	+71%
3	Krakow, Poland	+58%
4	Albania Coastline	+53%
5	Riga, Latvia	+40%

*2025 vs 2024



*ranking is based on destinations with +1,000 departures per year and showing month-on-month growth (2025 vs 2024).



SMART SPEND TRAVEL



But just because people are becoming more adventurous to find a good deal or looking at destinations they may not previously have considered doesn't mean they are skimping on what they want to pay for... In 2025, **72% of 4+ star hotel bookings on the platform were paired with a low-cost carrier**, a 12% increase year-on-year. Bookings for these 4+ star hotels in 2025 saw an eight per cent increase year-on-year, but 14% of all 4+ star hotels were booked via deals.

In further proof that travellers want comfort on their terms, the number of **customers adding at least one ancillary service at checkout in 2025** (such as baggage, transfers, seat selection, etc) increased 14% year-on-year. This continued in the first two months of the year with a further 9% increase in ancillary services year-on-year. With some clear winners in terms of what people value:

SEAT SELECTION

By far, the fastest-growing ancillary service, with 25% of travellers opting to select their seat (+101% vs. 2024). This growth reflects both strong customer demand and the significant expansion of our seat selection coverage in 2025.

- Sun & Beach destinations 24%
- City Breaks 25%

+101%



PRIORITY BOARDING

+30%

7% of travellers included this service to their booking, with big uplift YoY of +30%.

- Sun & Beach 7%
- City Breaks 7%



INSURANCE

+17%

16% of travellers added an insurance to their booking (+17% YoY).

- Sun & Beach 16%
- City Breaks 16%



TRANSFER

+13%

23% of travellers included a transfer to their booking (+13% YoY), for door-to-door comfort.

- Sun & Beach 32%
- City Breaks 11%



*breakout graphic on ancillary services with the highest year-on-year growth

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2026