



Post-Summer 2024 Tourism Trends and Forecasts for France, Greece, Italy, and Spain



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The Olympics effect and the stability of the domestic market

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Few domestic tourists and a clear drop in rates

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sees a rise in September tourism driven by American and German visitors

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Weekend rate surges extend into October; increase in Northern European tourists

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Americans and Germans are the top foreign markets in September and October in all four countries analysed

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Beyond summer: the four countries compared

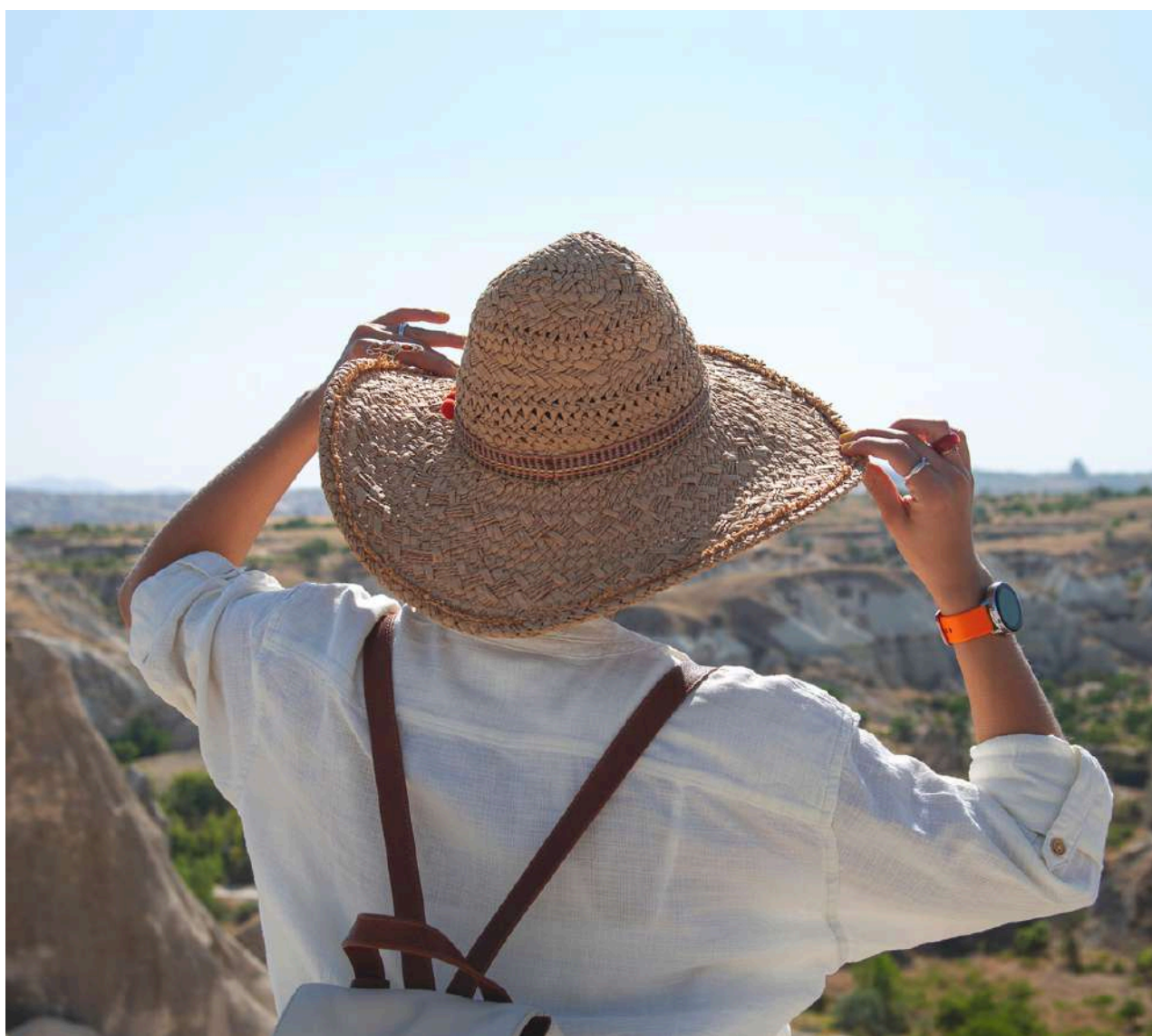
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INTRO

Summer in most places means peak tourist season. But what happens in popular Mediterranean destinations like France, Greece, Italy, and Spain as the crowds thin out after July and August?

Who are the travellers opting for vacations in September and October to avoid the sweltering summer heat? Which markets can these destinations target to promote off-season travel?

In this report, we explore tourism trends, OTA rates, and GDS flights in September and October, compared to the bustling summer months.



KEY FINDINGS



Italy and **Spain** share similar trends: The primary market in August is domestic, which drops by 9-10% in September and October. The USA and Germany become the top sources of tourists after the summer.

Italy is the only country where GDS bookings in September surpass those in August.



Greece is an exception compared to the other countries analysed, as the vast majority of its visitors are international, both in high and low season.



In **France**, the Olympics have a significant impact throughout the summer: OTA rates, which surge from late July to early August, remain stable until early October.



Americans and **Germans** are the leading markets for GDS flight bookings to all destinations analysed throughout September and October.



France: The Olympics effect and the stability of the domestic market



Domestic market stability: A review of September and August 2023 indicates that in France, domestic visitors typically travel within the country in both August and September through October.

Here as well, there is a decrease in the percentage of domestic visitors in September and October, although this decline is less pronounced compared to Spain and Italy, amounting to only -3%.

Additionally, it appears that after the summer season, the French tend to reduce their international travel, as shown by data observed for Italy, Spain, and Greece.

Similarly, like in the other countries analysed, the presence of German and British tourists increases after August, while the number of Italian visitors declines.

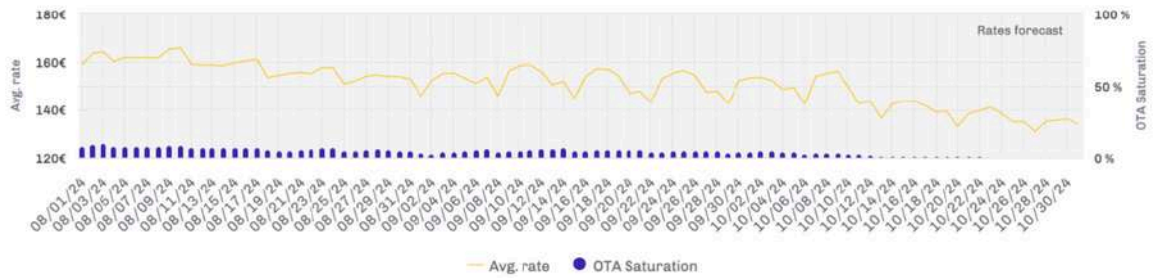


Rates remain steady due to the Olympics effect: In September and October 2024 in France, there is a slight decrease of only 5% compared to August, especially in accommodation rates. This indicates that the rise in average OTA rates attributed to the 2024 Olympics continues into September and early October.



AVERAGE RATES AND OTA SATURATION

Overview of rates and OTA saturation for the selected period.



(France - analysis of average OTA rates August-October 2024 - source: D/AI Destinations)



Diversification in emerging markets: While domestic visitors remain stable in numbers for September and October, there is a noticeable decrease in the percentage of domestic GDS flight bookings for this period (-4%). Meanwhile, travellers from the United States and emerging Asian markets like South Korea and Japan are on the rise.

INSIGHTS INTO THE COUNTRIES OF DEPARTURE

Analysis of booking behaviour by country of origin for the selected period.

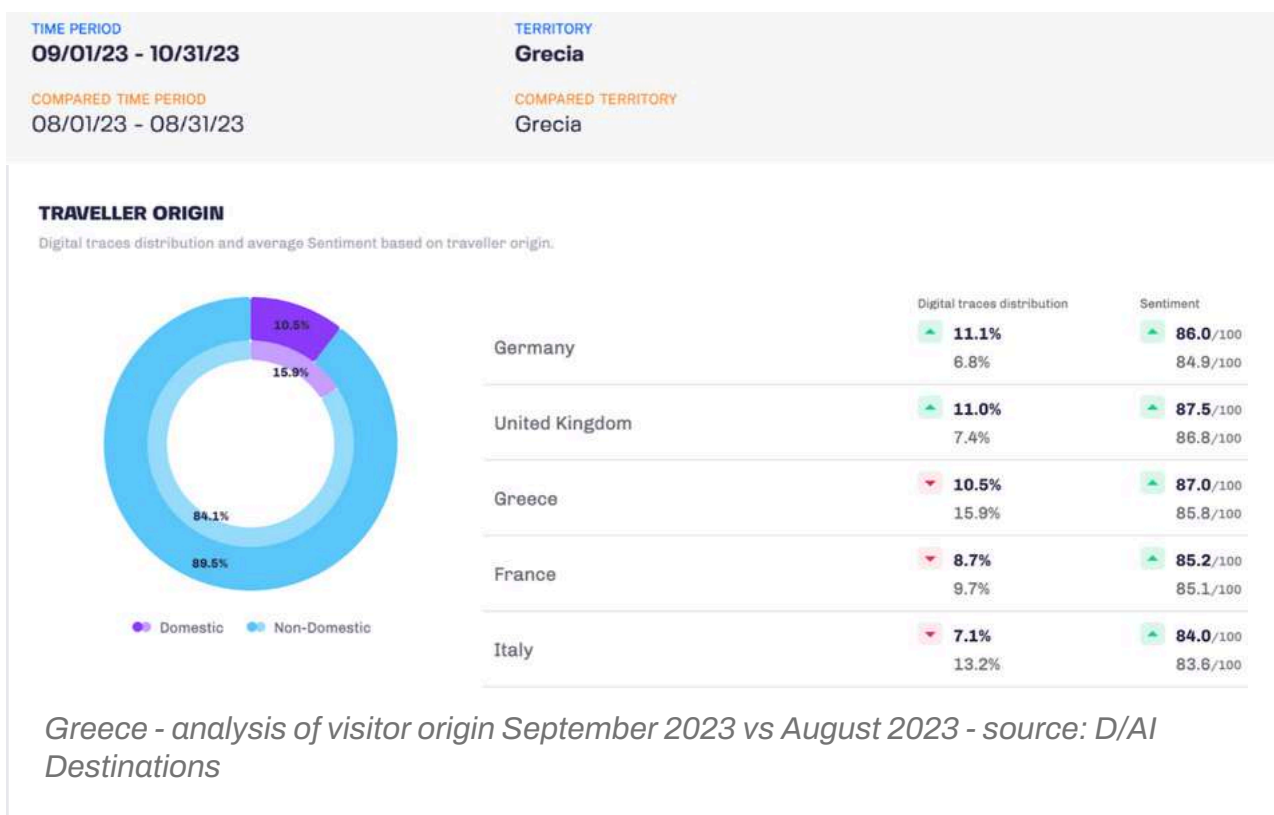
	Passengers distribution	Search window (days)	Length of stay (nights)	Top search period	Top arrival period
United States	▲ 14.4% 10.1%	▲ 208.0 164.8	▼ 11 13	28 Aug - 4 Sep	2 Sep - 9 Sep
France	▼ 10.2% 14.8%	▲ 177.2 141.6	▼ 7 9	28 Aug - 4 Sep	26 Aug - 2 Sep
South Korea	▲ 4.9% 1.4%	▲ 204.9 161.1	▼ 9 12	28 Aug - 4 Sep	2 Sep - 9 Sep
Germany	▲ 4.4% 1.8%	▲ 204.3 168.0	▼ 5 7	28 Aug - 4 Sep	26 Aug - 2 Sep
Japan	▲ 3.6% 2.5%	▲ 181.6 160.3	▼ 8 11	28 Aug - 4 Sep	9 Sep - 16 Sep

France - analysis of GDS flights September/October 2024 vs August 2024 - source: D/AI Destinations

Greece: Few domestic tourists and a clear drop in rates

High percentage of international visitors: Compared to the other countries analysed, Greece has an overwhelming predominance of international visitors over domestic ones, both in high and low seasons.

Local visitors, even in peak season, account for only 16% (August 2023). In September and October, this number drops to 10%, coinciding with a decline in Italian and French visitors who, as we've seen, prefer to travel in August. Similarly to other destinations, after the summer peaks, Germans, Americans, and Britons are more prevalent.





Constantly declining rates: There is a significant and continuous decrease in prices from late August to October (-24%), particularly within the hospitality sector.

Unlike Spain and Italy, where prices in September and October show little variation, Greece sees a continuous and gradual decline in prices from late August, reaching their lowest levels by late October. This trend indicates a more pronounced seasonal fluctuation in Greece.



American and German travellers increase in September and October: GDS flight data reveals that the American market consistently dominates during both periods under review. It shows a 4% growth during the off-season but remains stable overall, with peak arrivals occurring in the last week of August and the first week of September.

German travellers follow closely, showing a notable 8% increase in presence during September and October compared to August, while French visitors exhibit a slight decline. The rise in British visitors during September and October also indicates similar travel trends by market across different destinations.

INSIGHTS INTO THE COUNTRIES OF DEPARTURE ⓘ

Analysis of booking behaviour by country of origin for the selected period.

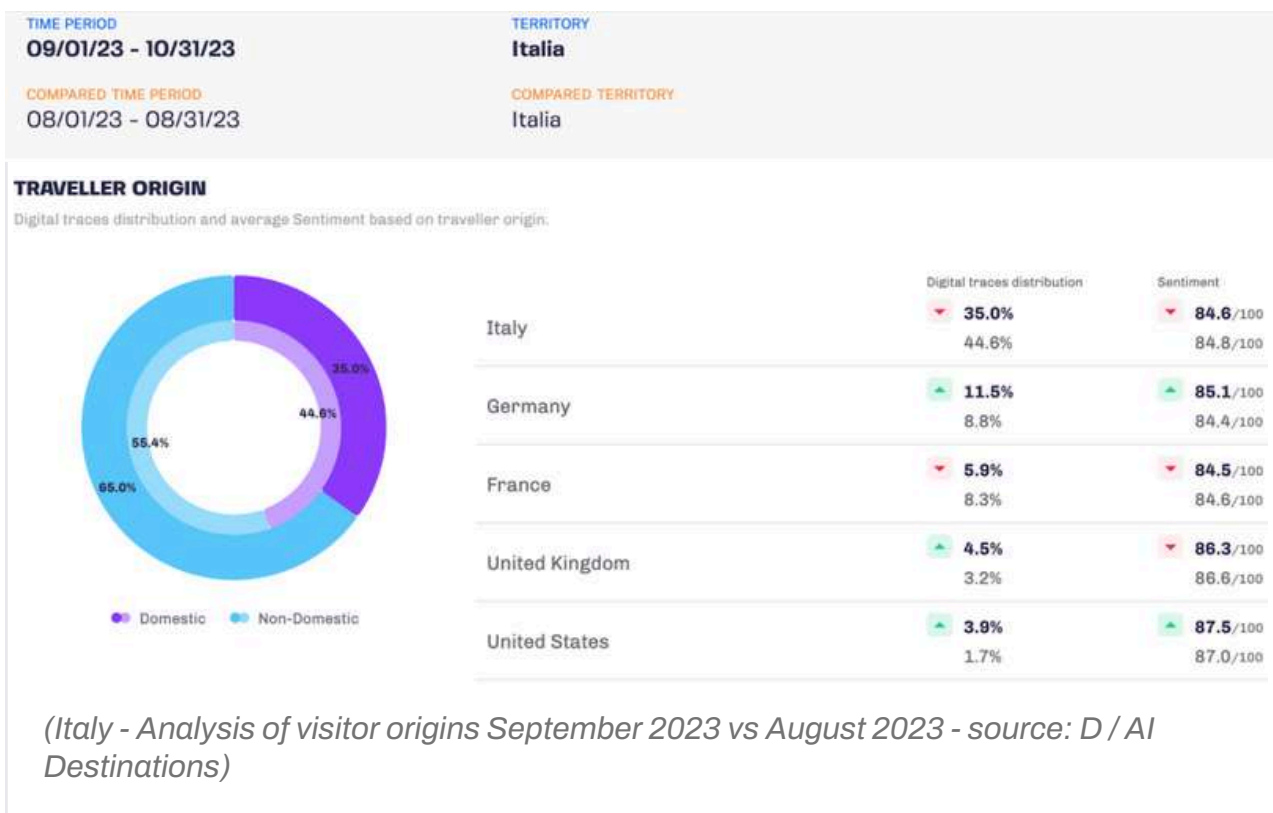
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France	▼ 7.7% 8.7%	▲ 197.4 166.2	▼ 7 9	4 Sep - 11 Sep	2 Sep - 9 Sep
Greece	▼ 7.4% 8.2%	▲ 191.0 147.3	▼ 6 7	4 Sep - 11 Sep	2 Sep - 9 Sep
United Kingdom	▲ 5.2% 4.1%	▲ 223.9 184.4	▼ 8 8	4 Sep - 11 Sep	16 Sep - 23 Sep

(Greece - analysis of GDS flights September/October 2024 vs August 2024 - source: D / AI Destinations)

Italy sees a rise in September tourism, driven by American and German visitors



Market dynamics post-August: While August is primarily driven by domestic tourism, September and October see a notable rise in visitors from the United States and Germany. Analysis from September and October 2023 reveals a nearly 10% decrease in Italian travellers during these months, underscoring the strong association of domestic vacations with mid-August. Similarly, the French and Spanish markets decline as travellers from these regions also prefer August for their vacations.





Rates down by 15% and shorter stays: Hotel and short-term rental prices on OTAs are 15% lower in September and October compared to August, making these months attractive to budget-conscious travellers. However, August remains a peak travel period, especially for domestic travellers, due to summer business shutdowns, which leads to increased demand and rates.

Additionally, the average length of stays drops significantly from August to October, going from 12.7 nights to 8.8 nights. This suggests that off-season travellers tend to book shorter stays.



Stable flight bookings in September: GDS booking reveal that Italy shows very similar booking numbers between August and September compared to other countries analysed. There is even a slight increase, followed by a decline in October. The primary markets shift over the months: in August, the domestic market dominates, consistent with data from the previous year and typical Italian summers.

However, in September and October, the main markets are the United States, followed by Germany. Germany stands out as a key market for many Italian destinations during this period, with a high average number of German tourists travelling by road.

INSIGHTS INTO THE COUNTRIES OF DEPARTURE ⓘ

Analysis of booking behaviour by country of origin for the selected period.

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(Italy - Analysis of GDS flights September/October 2024 vs August 2024 - source: D / AI Destinations)



Spain: Weekend rate surges extend into October; increase in Northern European tourists



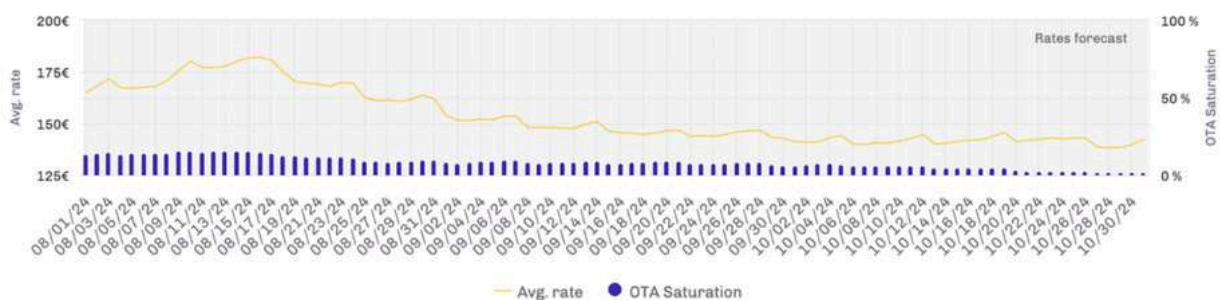
Similar trends to Italy: In Spain, traveller behaviour closely mirrors that of Italy. Based on the 2023 origin analysis, August sees a primary focus on domestic travel, which decreases by 9% in September and October. The second largest market in August consists of neighbouring French travellers, followed by Italians, with Southern European countries reaching their peak holiday period in August.



Rates drop by 16% in September: Hotel and short-term rental rates in Spain during September and October are typically 16% lower on average, with consistent daily rates for both months. Similar to Italy, travelling during these months is considerably more affordable compared to August. However, unlike Italy, where prices remain relatively stable, Spain sees a notable rise in weekend rates throughout all three months, a trend less evident in Italy. This suggests a higher demand for weekend getaways in the Spanish market.

AVERAGE RATES AND OTA SATURATION

Overview of rates and OTA saturation for the selected period.



(Spain - Analysis of average OTA rates August-October 2024 - Source: D / AI Destinations)



After August, the number of Germans, Swedes, and Norwegians doubles: Compared to August, flight bookings via GDS show that the domestic market remains the primary origin market but sees a significant decline (-10%). Meanwhile, Germans double their bookings (11%), along with tourists from Northern European countries: Sweden (6%) and Norway (5%).

INSIGHTS INTO THE COUNTRIES OF DEPARTURE ⓘ

Analysis of booking behaviour by country of origin for the selected period.

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(Spain - Analysis of GDS flights September/October 2024 vs August 2024 - Source: D / AI Destinations)

Americans and Germans are the top foreign markets in September and October in all four countries analysed

In 2023, digital footprint data revealed that during the summer, the majority of visitors from the countries analysed are domestic: 35% in Italy, 44% in Spain, and 43% in France, with Greece being the sole exception.

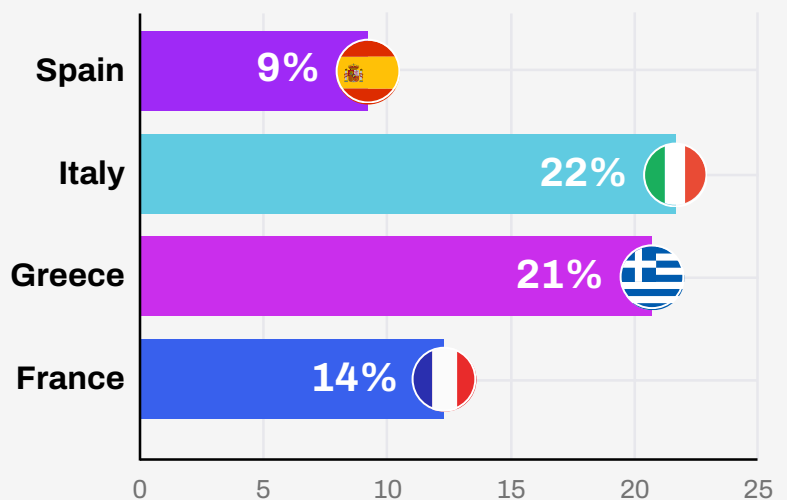
Additionally, in 2023, the most frequent countries of origin are European, such as Germany and England.

During September and October, Americans and Germans continue to be the predominant origin markets for flight bookings via GDS across most Mediterranean regions.



WHERE DO THEY VACATION? AMERICANS

Americans are the leading market for flight bookings via GDS in Italy (22% of the total), Greece (21%), and France (14%) in September and October. They are the third largest market in Spain (9%).



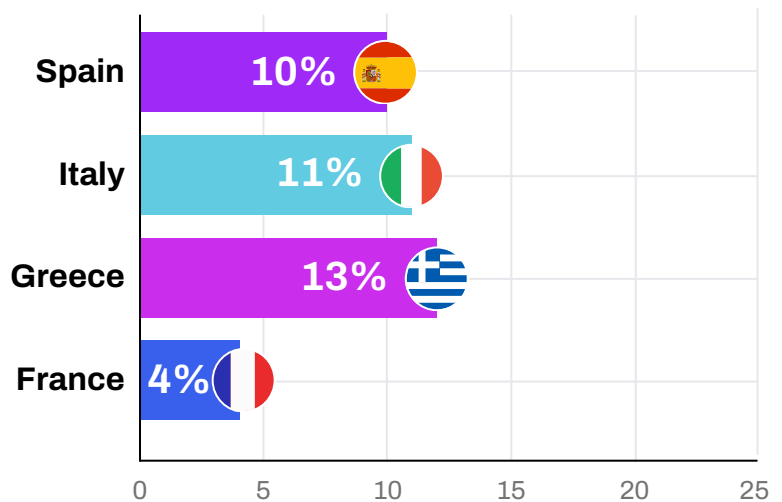
Percentage of American tourists in September-October 2024

September- October 2024
(Source: GDS flights - D / AI Destinations)

WHERE DO THEY VACATION?

GERMANS

Germans are the second largest market for GDS flight bookings in September and October, with 11% in Italy, 10.5% in Spain, and 13% in Greece. In France, they rank fourth at 4%.



September- October 2024
(Source: GDS flights - D / AI Destinations)

Percentage of German Tourists
in September - October 2024

These numbers confirmed the trends observed on an international level.

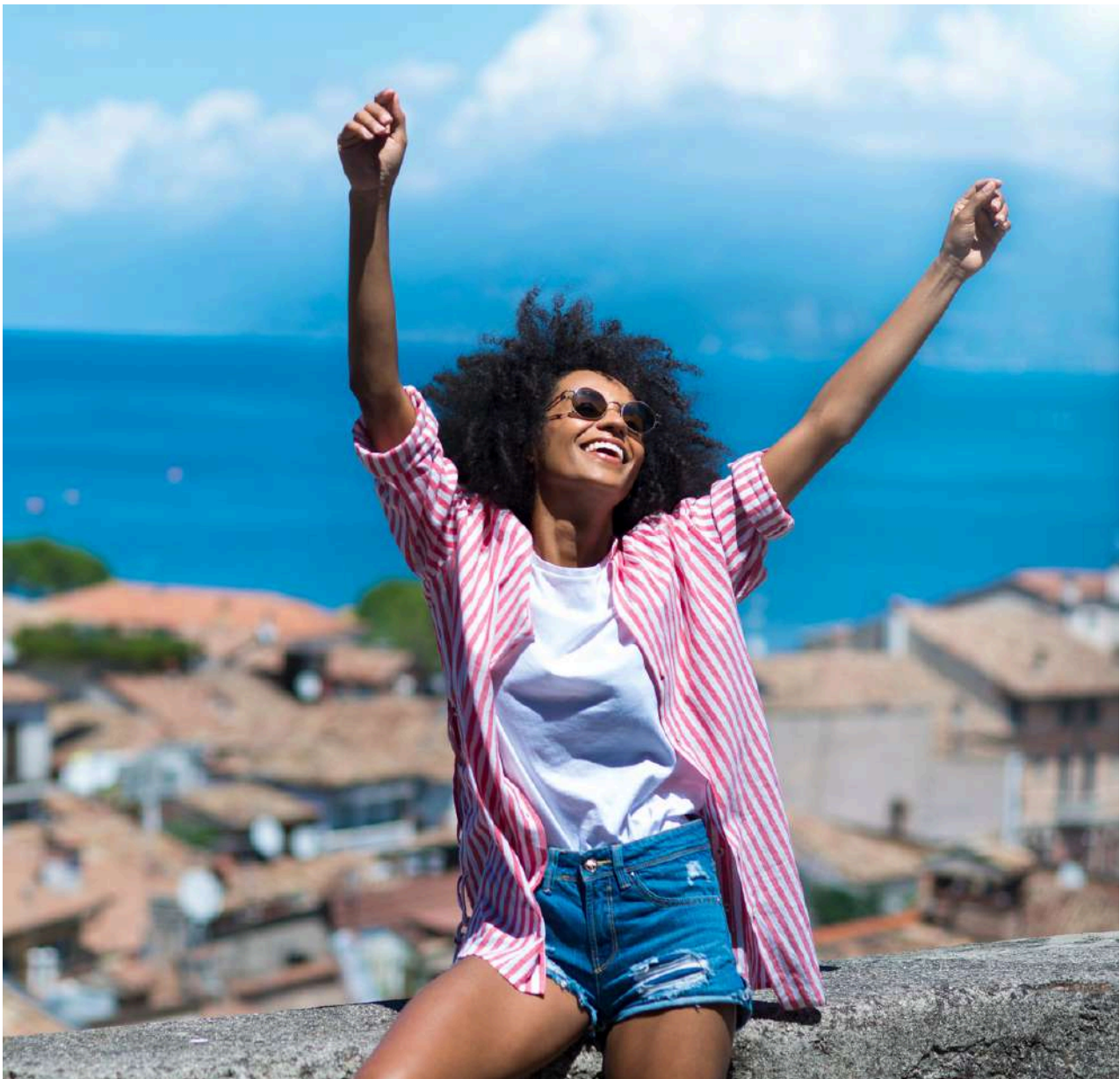
According to the recent McKinsey & Company report "[The State of Tourism and Hospitality 2024](#)," the United States, Germany, the United Kingdom, China, and France are the world's top five sources of travellers and collectively represent 38% of international travel spending in 2023. These countries are expected to continue as the top five origin markets until 2030.

Americans continue to show a preference for travelling throughout the year, including during less crowded periods before and after the peak summer season. The [European Commission](#) notes that historically, American travellers tend to visit Europe most often between May and September. Even our [Easter 2023 report](#) confirmed that American visitors have once again become the primary incoming market in terms of flight bookings via GDS for many countries across the continent.

It's worth mentioning that the increase in remote work and greater flexibility in the workplace allows Americans to travel during various times of the year without being tied to the summer season.

Germans, with the largest population in the EU, are key players in the global outbound travel market.

September and October is largely influenced by the varying timing of school vacations. These holidays span approximately six weeks and resume in October and November with the autumn holidays, known as Herbstferien,, lasting about two weeks. Families use this period to enjoy the mild weather and take advantage of lower prices, especially in neighbouring countries.



Beyond summer: the four countries compared

Our analysis confirms that the trends for the post-summer season remain consistent across all examined destinations — France, Greece, Italy, and Spain — with the specific differences as previously noted.



Extension of the summer tourism season: Data following the peak tourism period in August indicates a further lengthening of the holiday season beyond expectations. This trend could positively impact destinations from a sustainability standpoint, suggesting a reduction in the risk of summer overtourism.

As of now, GDS flights monitored on our platform show a significant decline in travel, especially in October compared to August. However, it's important to note that this data is only partial, as bookings increase significantly closer to the departure date.



Price reduction: The decrease in accommodation prices across all analysed countries in September and October suggests an opportunity for budget-conscious travellers and a potential market strategy to extend the tourism season.



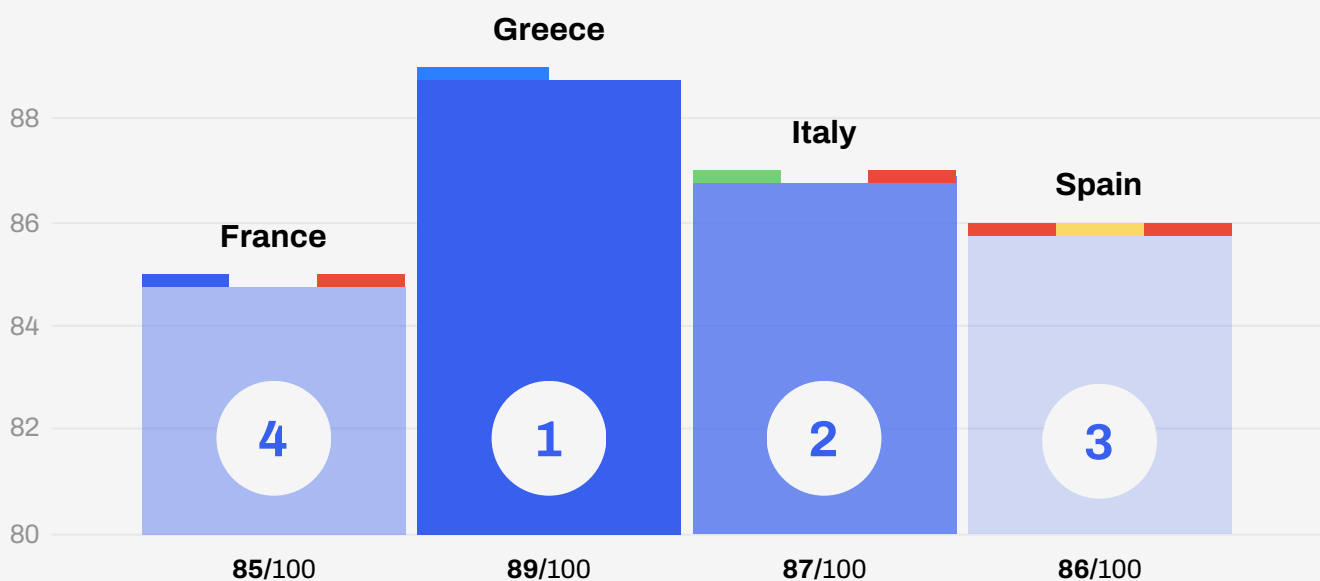
Variety in origin markets: The increase in visitors from diverse markets (particularly from countries like the United States and Germany) during the off-peak season highlights a trend among travellers to avoid the tourist congestion of August, preferring less crowded and potentially more economical periods.

As confirmed by the McKinsey study quoted above, Europe has historically been a major hub for intra-regional travel, with 70% of Europeans' international trips taking place within the region. Popular destinations include Spain, Italy, and France. This trend is anticipated to continue unchanged until 2030.

To complete our analysis, here is a summary of some comparative factors:

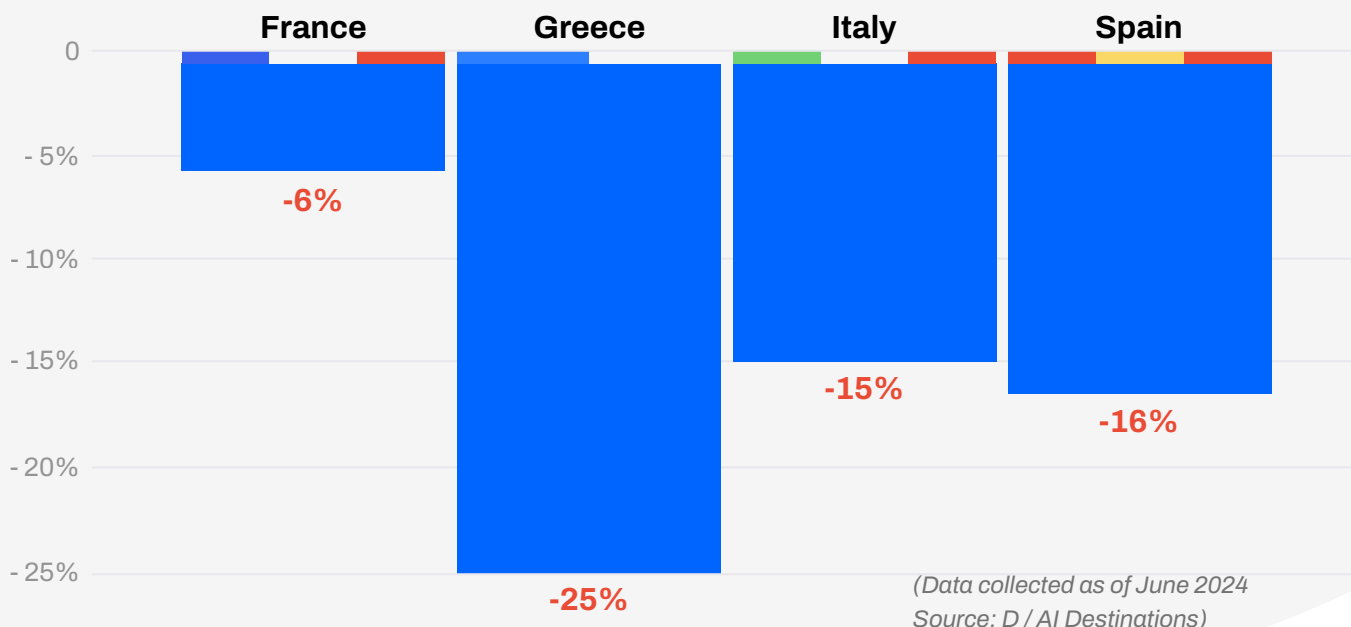
- Sentiment score last 6 months
- Average rates September/October 2024 vs August 2024
- Percentage change in GDS Flights September-October 2024 vs August 2024
- Trend of summer rates August-October 2024

Which country has the highest sentiment score over the last 6 months?



Sentiment Score
(Source: D / AI Destinations)

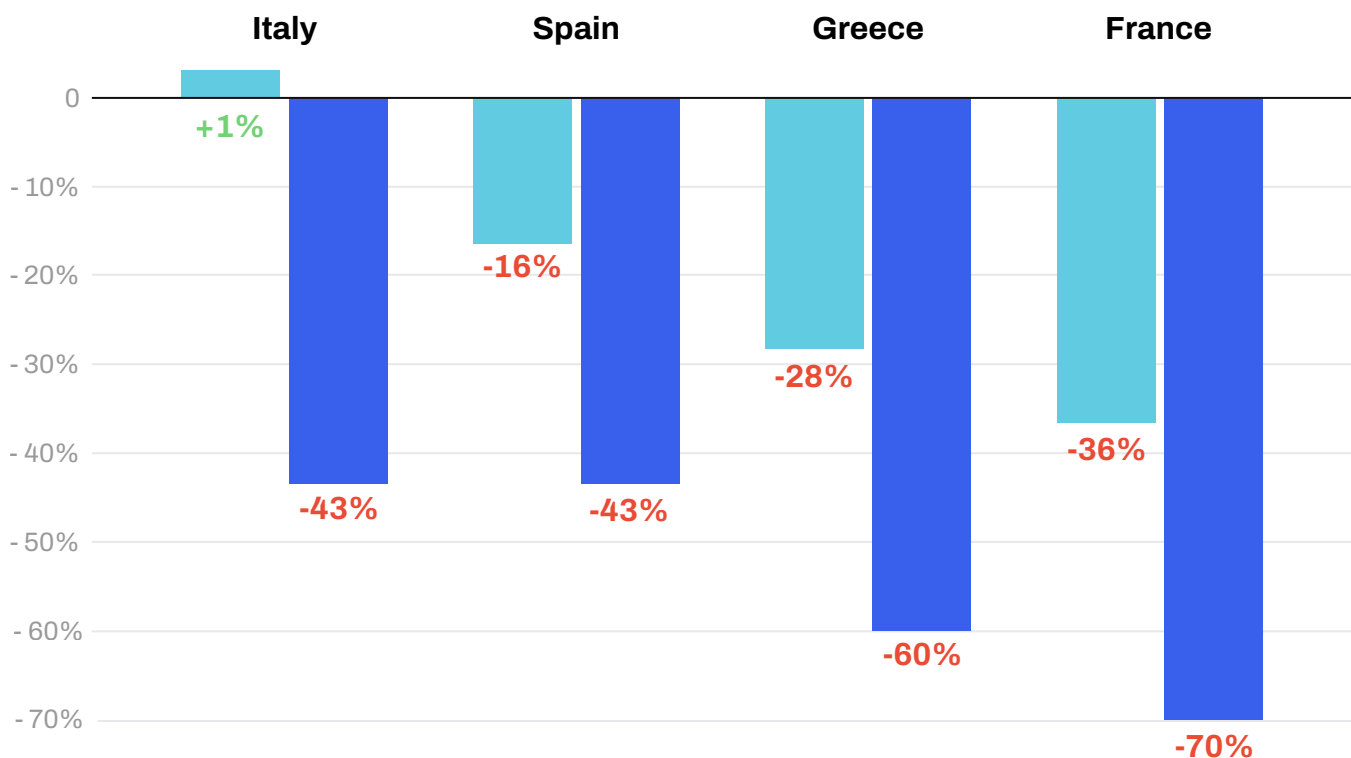
Which country has experienced the highest decrease in OTA rates in September/October?



What is the variation in GDS flights from September/October compared to August 2024?

September
October

(Data collected as of June 2024
Source: D / AI Destinations)



The Data Appeal Company

The Data Appeal Company, through a proprietary algorithm based on artificial intelligence, machine learning and semantic analysis collects, measures and analyses all feedback posted online, combining it with geographic and contextual data, offering the regions and enterprises the opportunity to optimise the business's potential, gain in-depth market knowledge and establish a competitive advantage. The Data Appeal Company SpA (formerly Travel Appeal) has belonged to the Almaxwave Group since 2022.

In 2023 the company acquired 70% of the share capital of Mabrian Technologies S.L., a Spanish company specialising in Travel and Destination Intelligence solutions, to consolidate its international positioning.

The company 's mission is to simplify the use and understanding of data to help companies and tourist destinations make effective and informed decisions.

[Explore our Destination Management solutions](#)