



Shape the future
with confidence

EY Future Travel Behaviors Observatory

How travelers' expectations and
behaviors are changing

2025 edition



The better the question. The better the answer. The better the world works.

The EY Future Travel Behaviors Observatory, now in its fifth edition, analyzes travel intentions, the factors influencing choices, preferred ancillary services (both free and paid), the inclination towards sustainable options, and behaviors associated with habitual short-distance travel.

More than 5,000 participants from Italy, France, Germany, the United Kingdom and Spain contributed to the study. Our analytical approach combines explicit questions with implicit psychological tests to probe the underlying motivations that influence travel choices. In addition to studying future travel habits and behaviors, the analysis identifies differences in travel choices and preferred destinations among travelers in various countries.

Some key themes that emerged prominently in 2024 continue to be the focus of analysis: the growing trend of combining leisure with business, the influence of inflation on travel intentions, the travel behaviors and preferences of younger generations, and the increased tendency to use AI-based tools.

The 2025 Observatory introduces new dimensions of analysis, including the impact of overtourism on future travel choices.

For specific topics, participants were invited to provide open-ended responses, which were analyzed using Generative AI tools.

Specifically, AI/Gen AI tools were used for targeted analysis and the processing of the report.





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Main findings

1

Once again this year, the EY Future Travel Behaviors Observatory, now in its fifth edition, analyzes behaviors and trends in the leisure and business travel industry. More than 5,000 participants from Italy, France, Germany, the United Kingdom and Spain contributed to the study.

From revenge tourism to a trend of stability in travel intentions

Travel intentions for 2025 remain broadly aligned with those of 2024, reflecting a continued desire to explore the world. Nine out of ten Europeans plan at least one vacation trip, with 60% planning to travel abroad within Europe, and 30% aiming for destinations beyond the continent. Italy remains the second favorite destination for European travelers, right after Spain. For the first time since 2021, our Observatory has not detected a significant increase in travel intentions. Having definitely moved past revenge travel, the impulse to travel more than before as a reaction to pandemic restrictions, we expect demand to stabilize. The trend toward stability also applies to business travel, which has now returned to pre-pandemic levels. However, within this overall stability, some trends are influenced by socioeconomic factors and evolving travel offerings. In France, for instance, declining consumer confidence has led 22% of travelers to reduce the number of vacation trips and 30% to cut back on business travel. On the other hand, in Spain, the expansion of high-speed train offerings has seen a 10% increase (from 45% to 55%) in those choosing the train for their vacations. In Germany, Italy, and the United Kingdom, there has been notable growth in air travel for leisure purposes.

The phenomenon of overtourism: a key concern influencing travelers' choices

The phenomenon of overtourism in certain destinations remains a major concern that will influence 4 out of 5 travelers. The most common strategy is off-season travel, a choice that 42% of travelers intend to follow, with a peak of 51% among Baby Boomers. Additionally, 36% of respondents will opt for lesser-known destinations, 35% will avoid group travel, and 30% will turn to "slow" tourism experiences. Travelers are also aware of the importance of policies and measures that stakeholders can implement to mitigate the negative effects of overcrowding. 39% of respondents call for stricter regulations and penalties from authorities for inappropriate tourist behavior. 37% are willing to book in advance to secure access to popular attractions, while 1 in 3 supports promotional campaigns to encourage tourism in alternative and less-visited destinations. Finally, 1 in 4 travelers says they are willing to pay a tourist tax to visit the most crowded destinations.

Combined business and leisure: a growing trend

1 in 2 travelers embraces the idea of combining leisure and business in the same trip. Interest in hybrid travel is steadily increasing, especially among younger generation: among Millennials, the percentage has risen from 63% to 67%, while among Gen Z it has increased from 71% to 79%.

There is a growing interest in various forms of mixing business and leisure:

- Workation: 23% are interested in working remotely from a vacation location for a limited period.
- Bleisure: 22% would like to extend a business trip with a few days of relaxation.
- Digital Nomadism: 19% plan to work from anywhere in the world, thanks to technology. Several countries are recognizing the economic potential of digital nomads and have implemented policies to attract them, such as specific visas, favorable tax regimes and simplification of bureaucratic procedures.
- Team Bonding: 18% intend to travel with their business group to strengthen cohesion.

Price, a less relevant factor in travel choices

The percentage of those who consider price a determining factor in travel choices has declined from 65% to 58% in 2024.

Despite slackening inflation, 2 out of 3 travelers do not rule out the possibility of changing their travel habits due to decreasing purchasing power - a trend already observed in both 2023 and 2024 surveys. However, 1 in 5 travelers is unwilling to give up travel, even if it means cutting down on other expenses.



Artificial Intelligence (AI) and travel: opportunities and uncertainties

Travelers' interest in Artificial Intelligence (AI) continues to grow. Currently, 1 in 2 travelers would be willing to use a virtual assistant based on Artificial Intelligence (AI) to plan their vacations.

The percentage of people who have already experimented with a chatbot based on Artificial Intelligence (AI) for travel ideas or planning trips has increased by 50% compared to 2024, rising from 8% to 12%.

How can we define a future where we plan and manage our travels by interacting with Artificial Intelligence tools? Despite numerous innovations in the field of AI over the past year, opinions have remained largely unchanged. 72% of those surveyed express interest in AI, highlighting positive aspects such as innovation, usefulness, convenience, and practicality. On the other hand, 28% express distrust, fear, or skepticism about such developments.



The importance of information and incentives for eco-friendly travel choices

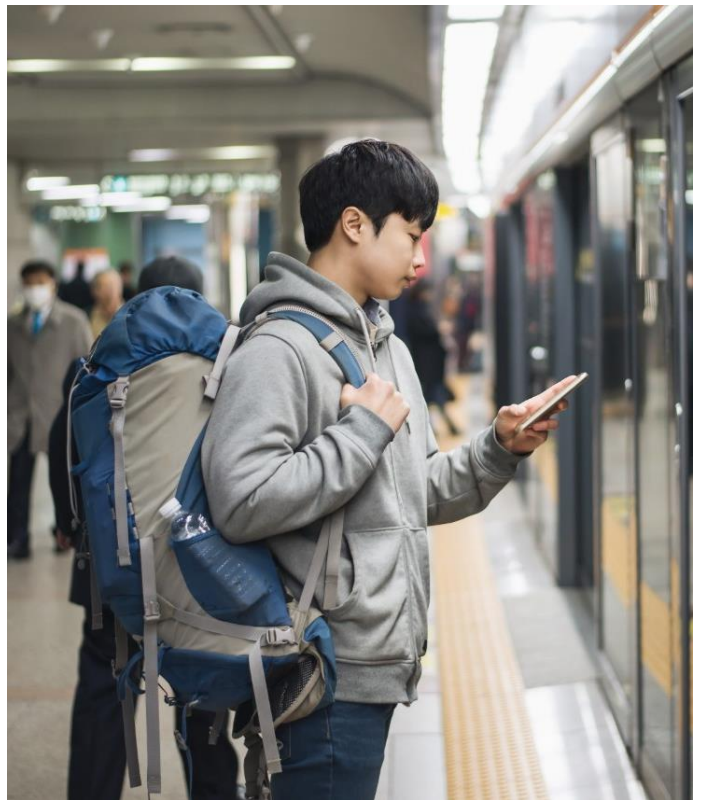
1 out of 2 travelers considers the environmental impact of their decisions important. Only 29% say they have never taken sustainability into account in their travel choices, a percentage that drops to 12% for Generation Z.

Tests also reveal that 60% of participants have an implicit favorable attitude toward environmental issues, though this figure has slightly declined from 64% in 2024. However, among the key factors influencing travel choices, price, convenience, and time remain predominant, while sustainability is considered a priority by only 20% of participants, a figure unchanged from the previous year.

An analysis of travel intentions among environmentally conscious travelers reveals an interesting trend: rather than reducing their trips, these travelers prefer "slower" and more mindful forms of tourism.

When asked what would encourage them to make more eco-friendly choices, respondents provided clear insights, drawing the attention of authorities and industry operators. 41% of respondents request more information and eco-friendly offers, while 31% highlight the importance of financial incentives. Only 11% demand greater transparency.

Digital technologies can play a key role in guiding citizens towards sustainable choices. 29% would be more inclined to use public transport and micromobility if they had access to a single digital platform to plan and pay for various services, while 27% say they would be positively influenced by a virtual assistant based on Artificial Intelligence (AI).



The future of travel according to Generation Z: AI agents, leisure/business mix, and sustainable behaviors

Understanding Generation Z's intentions and behaviors offers valuable insights into how travel will evolve, allowing us to anticipate future trends.

A key aspect is technology adoption. Generation Z is significantly more likely to use AI-powered virtual assistants to plan their trips, with 66% expressing interest, compared to 48% of the general population. They expect services similar to those of major digital platforms, such as one-click booking and access to premium services through subscriptions. Additionally, they show a strong preference for high-speed connectivity onboard.

A notable 79% of Generation Z are interested in combining leisure and business in the same trip.

Additionally, Generation Z exhibits a growing commitment to sustainability. They are willing to pay a surcharge to offset carbon emissions and claim to have already made conscious travel choices in the past, more than any other generation.



Profiles of Travelers Evolving in 2025

The study identified eight traveler profiles, many of which confirm the trends observed in the previous edition.

Hypertravelers represent 9% of travelers: they travel frequently for both business and leisure, seeking increasingly personalized experiences. Alongside them are the Serial Vacationers (9%), who love planning frequent getaways with family and friends. In contrast, the Reluctant Travelers (9%) are not particularly enthusiastic about traveling.

The Inflation Concerned, who represent 13% of the sample, are influenced by concerns based on their purchasing power.

Among the profiles most characterized by their relationship with technology, we find the Techno-Travelers (17%), Gen Z and Millennials who are very inclined to use digital tools and AI for travel, and the Tech-Suspicious Seniors, consisting of Baby Boomers and Gen X who are reluctant to use virtual assistants and other digital tools.

Lastly, the AI Dislikers, who, despite being digital natives, distrust AI (significantly decreased from 15% to 12%).



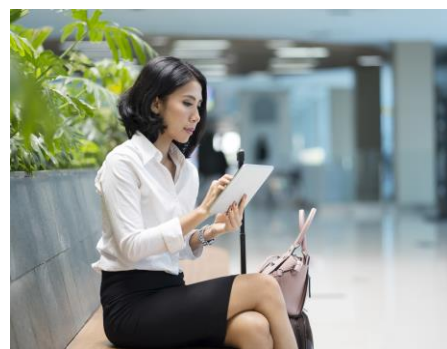
A new profile compared to 2024 is the Eco-conscious Seniors, who represent 17% of travelers. These Gen X and Baby Boomers travelers are particularly sensitive to environmental impact, and they believe more than anyone else that the transportation and travel sector should provide more information and eco-friendly options. They tend to plan trips during the off-season, choose lesser-known destinations, and prefer slow tourism experiences.



2

This section presents the key findings on current and future traveler behaviors and the factors influencing travel choices. More than 5,000 participants from 5 European countries answered questions regarding trips of at least 100 km, whether taken in a single day or involving an overnight stay for one or more nights, for either leisure or business.

- 1 Travel habits and future intentions (modes of transport, preferred destinations, and key decision drivers)
- 2 Main factors influencing travelers: environmental impact, personalization of experiences, and inflation
- 3 Desired free and paid ancillary services on trains and planes

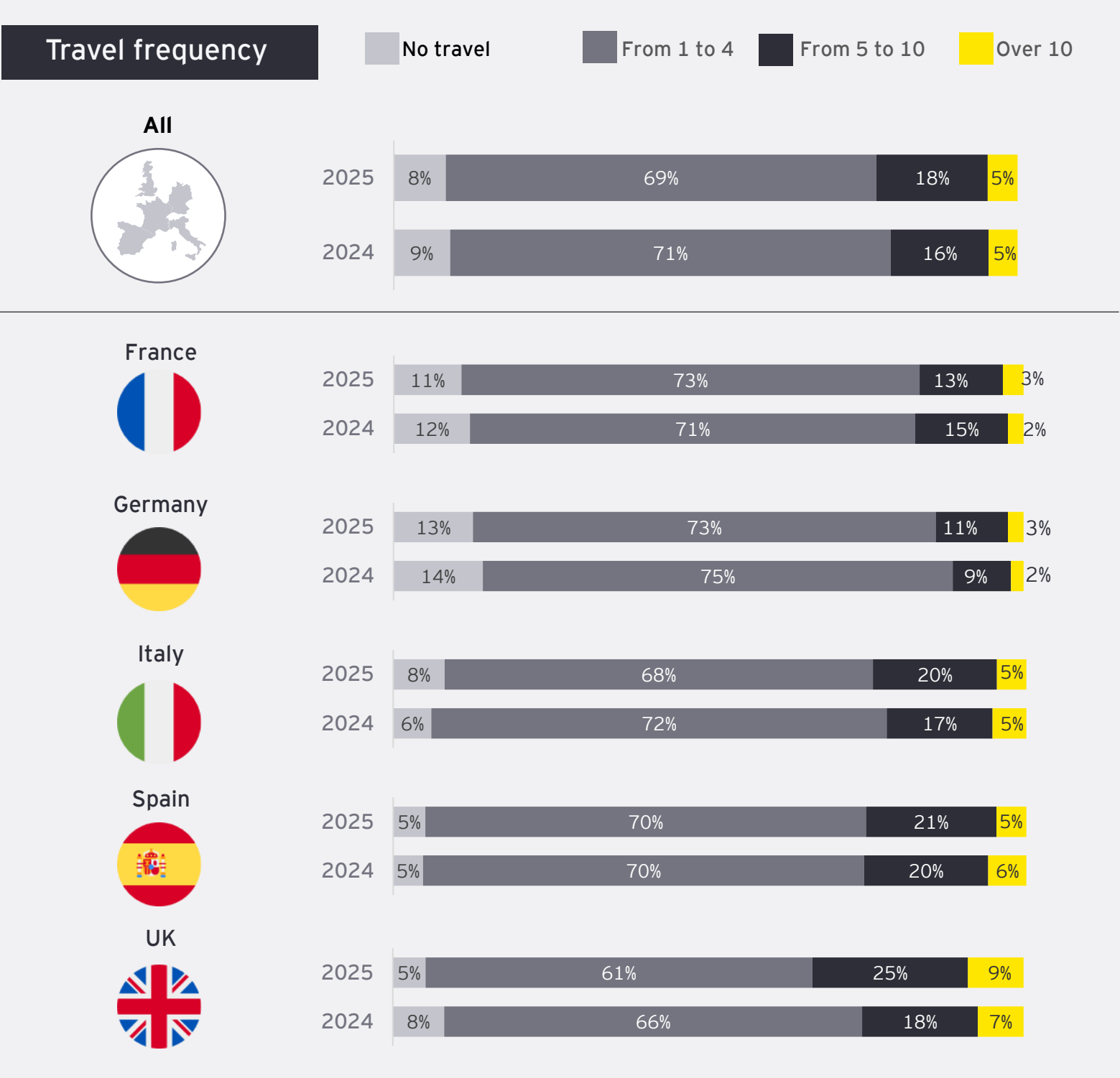


Travel behaviors and future intentions

2

Leisure travel: Travel intentions 2024-2025

The intentions recorded by the Observatory for 2025 are in line with those observed in 2024, confirming a continued desire to travel, with a slight increase in travel frequency.
9 out of 10 people intend to take at least one leisure trip. The share of people planning between 5 and 10 trips has increased by 2 percentage points, reaching 18%. This increase is more significant in the United Kingdom (+7pp) and Italy (+3pp).



Note: the 5 countries are represented in alphabetical order in English.

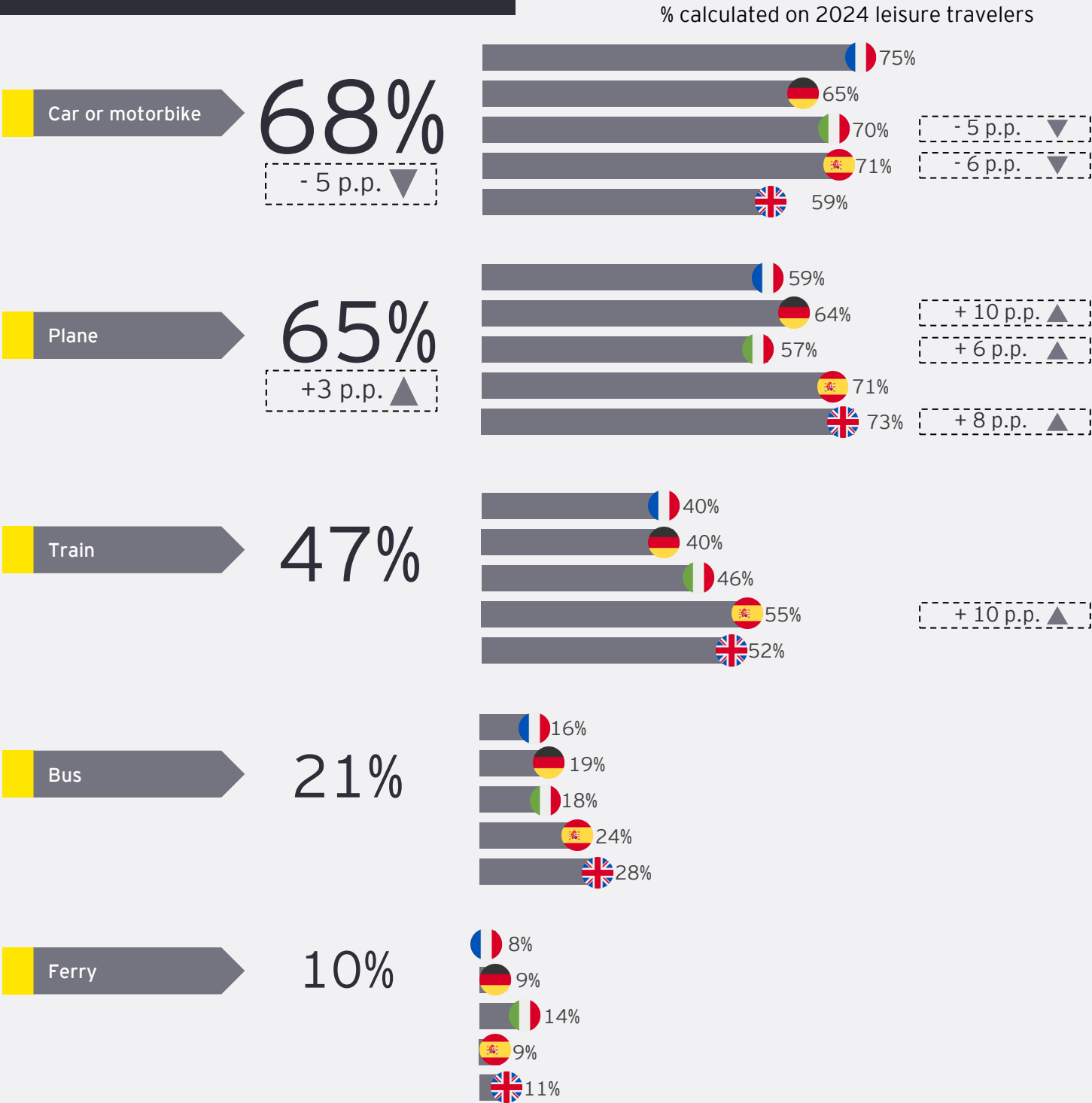
Note: the data shown for 2024 represents travel forecasts as measured by the EY Future Travel Behaviors 2024 Observatory.

2

Leisure travel: mode of transportation

Car/motorbike remains the most commonly used mode of transportation for leisure purposes in all countries except the United Kingdom. However, the use of planes and public transportation has increased. The plane is now the second most common mode of transport, used by 73% of travelers in the United Kingdom and 71% of those in Spain. Germany shows the most significant increase, rising from 54% in 2023 to 64% in 2024, followed by the United Kingdom (+8 percentage points) and Italy (+6 percentage points). The use of trains has grown particularly in Spain, with an increase of 10 percentage points.

Main modes of transportation chosen



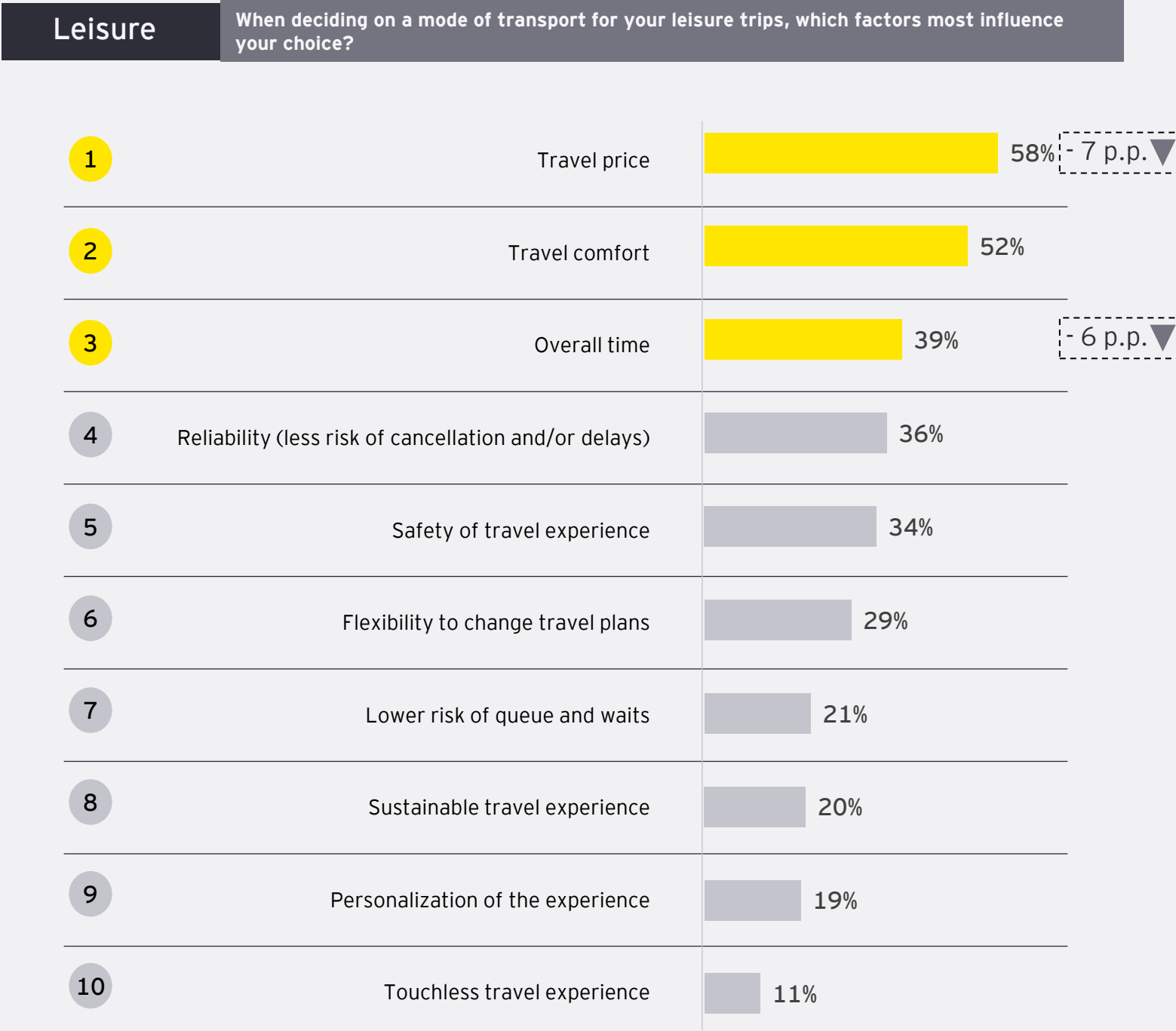
Main changes compared to the 2024 edition of the Observatory

2

Leisure travel:

What are the key drivers influencing the choice of transportation mode for leisure travel?

More than half of travelers consider price the most important factor when choosing transportation for leisure travel. However, the importance attributed to this factor has decreased by 7 percentage points compared to last year. Travel convenience remains the second most important factor, at 52%. The total time spent traveling is particularly important for Spaniards (48%), less so for Italians (34%) and French (35%). Meanwhile, travelers from the United Kingdom are more influenced by the reliability of transportation (45%) and the safety of the travel experience (42%).

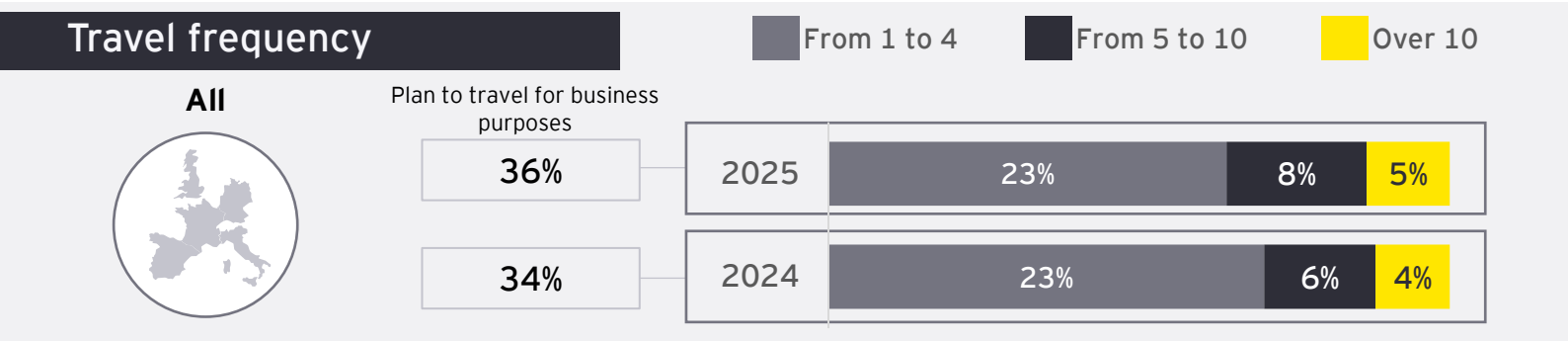


Main changes compared to the 2024 edition of the Observatory

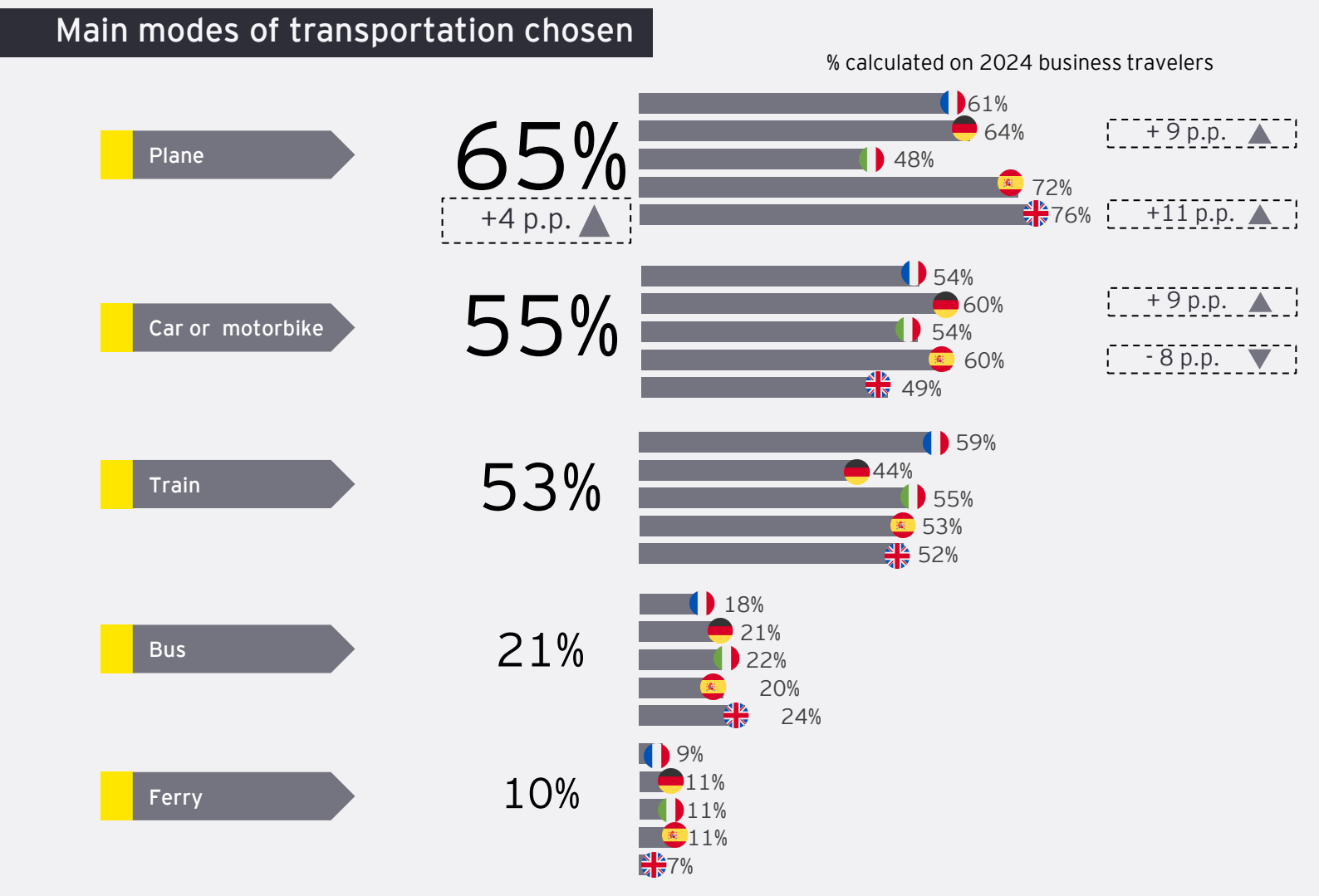
2

Business travel: 2024-2025 travel intentions and modes of transportation

Expectations for business travel show a slight increase compared to 2024: 36% plan to travel for business in 2025, up slightly from 34% in 2024.



In 2024, the plane remains the most used mode of transportation for business purposes, with its usage increasing compared to 2023. Travelers from the United Kingdom (76%) have intensified its use by 11 percentage points. For business travel, the train is more used than the car in France, Germany and Italy, and more than the plane in Italy.



Note: The data shown for 2024 represents travel forecasts as measured by the EY Future Travel Behaviors 2024 Observatory.

Main changes compared to the 2024 edition of the Observatory

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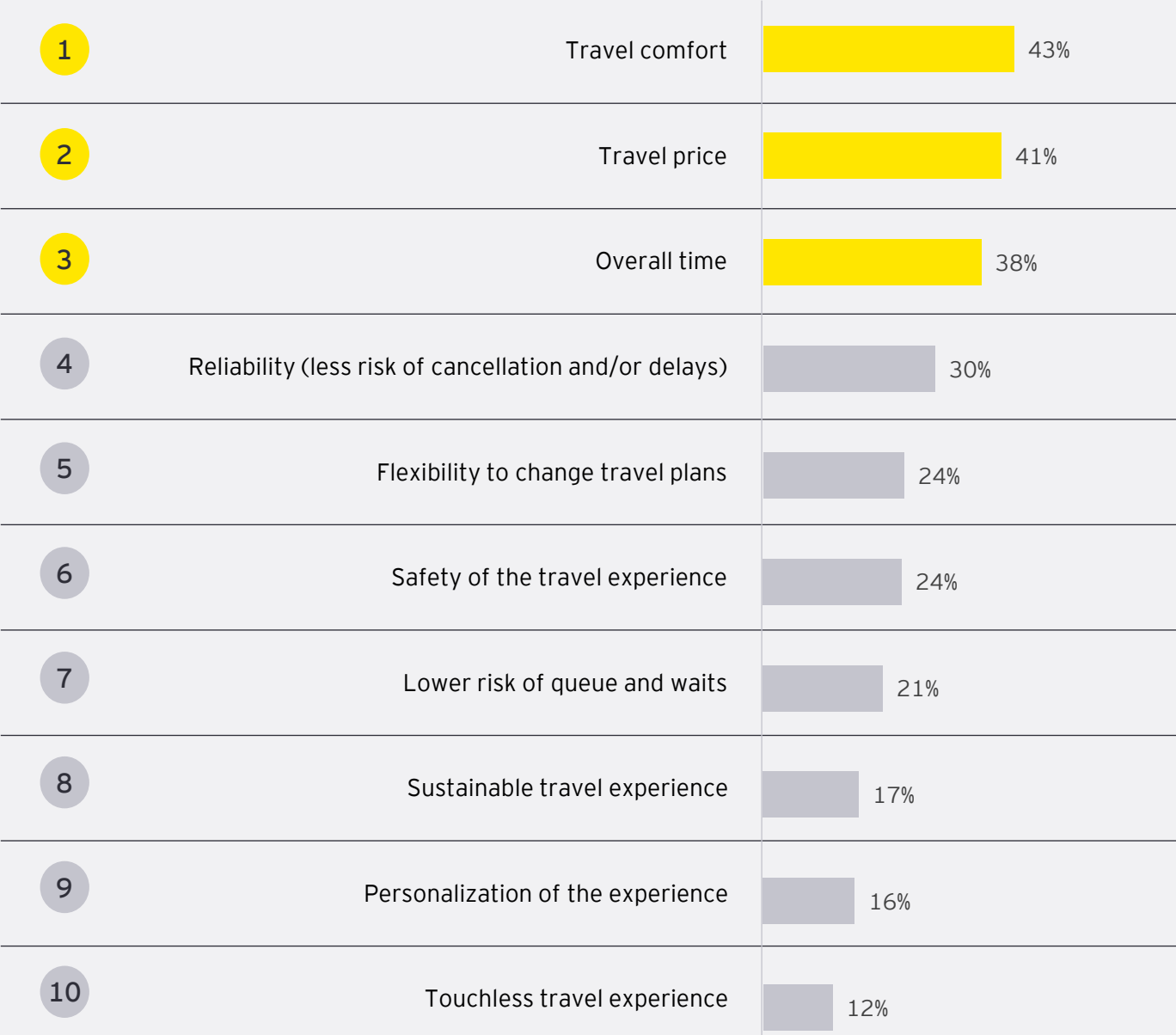
Business travel:

What are the key drivers influencing the choice of transportation mode for business travel?

For business trips, travel comfort is the most influential factor in the choice of transportation. Although considered less important compared to leisure travel, price remains among the top three factors, followed by the overall duration of the trip. Price is particularly important to French travelers (49% vs. 41% on average) and time to Spanish travelers (43% vs. 38%).

Business

Think about when you need to decide the mode of transport for your business trips. What are the factors that most influence your choice?

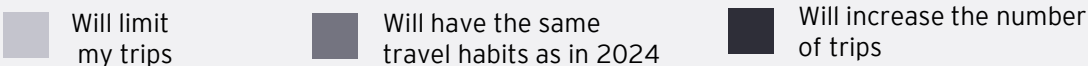


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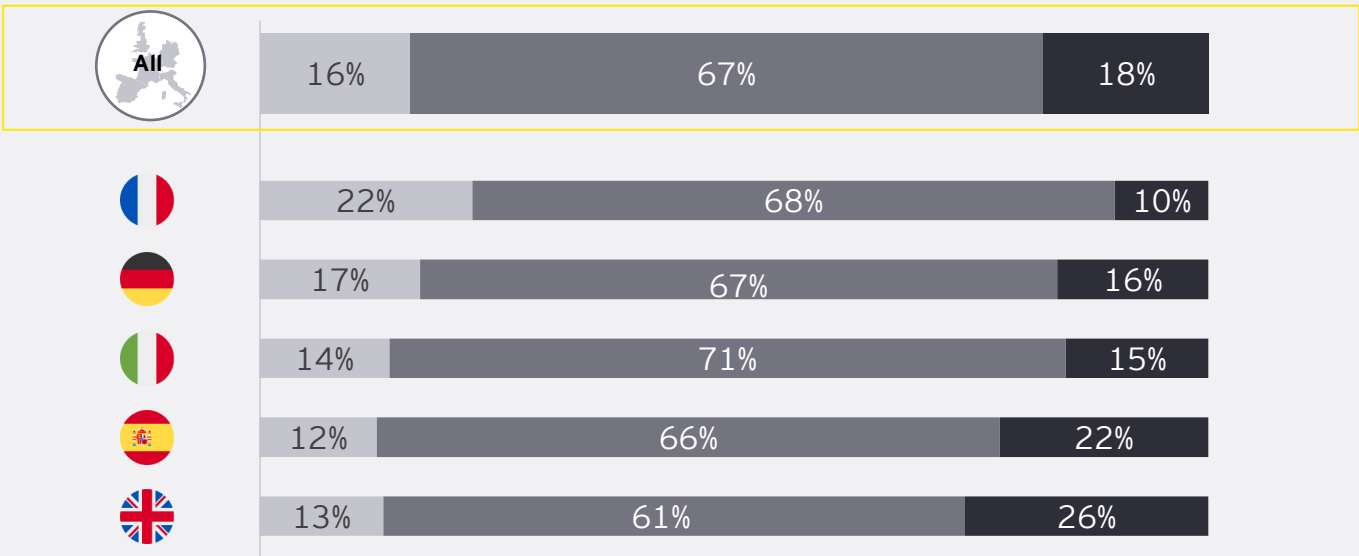
How travel attitudes are expected to change in 2025

The data suggests that in 2025, the majority of travelers will maintain the same travel frequency as in 2024. The number of travelers planning to increase their leisure travel is significantly higher in the United Kingdom (26%) and Spain (22%) than in France (10%). Regarding business travel, the United Kingdom is the only country where the number of travelers increasing their business trips exceeds those reducing them.

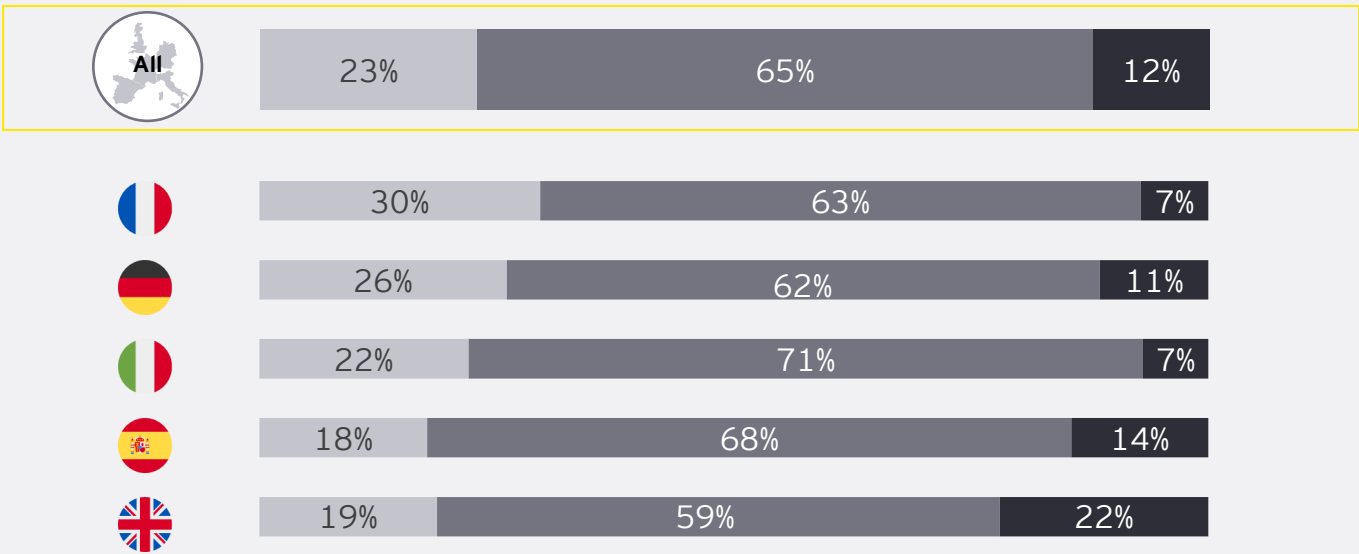
Travel attitudes in 2025 compared with 2024



Leisure



Business



2

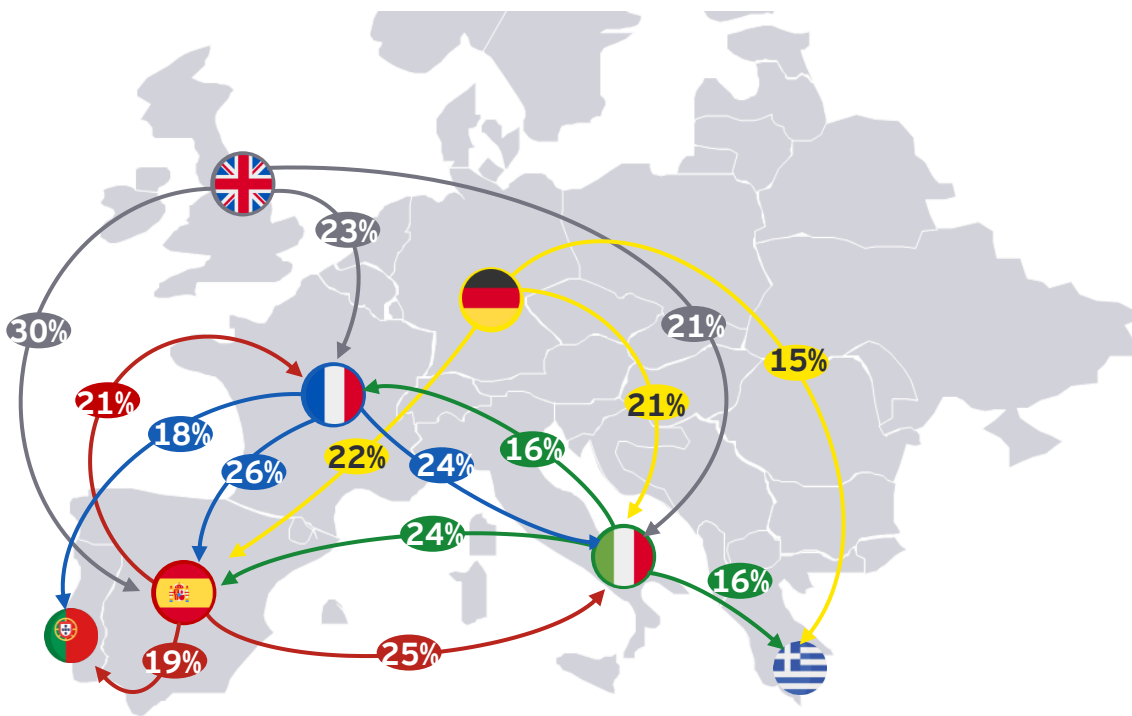
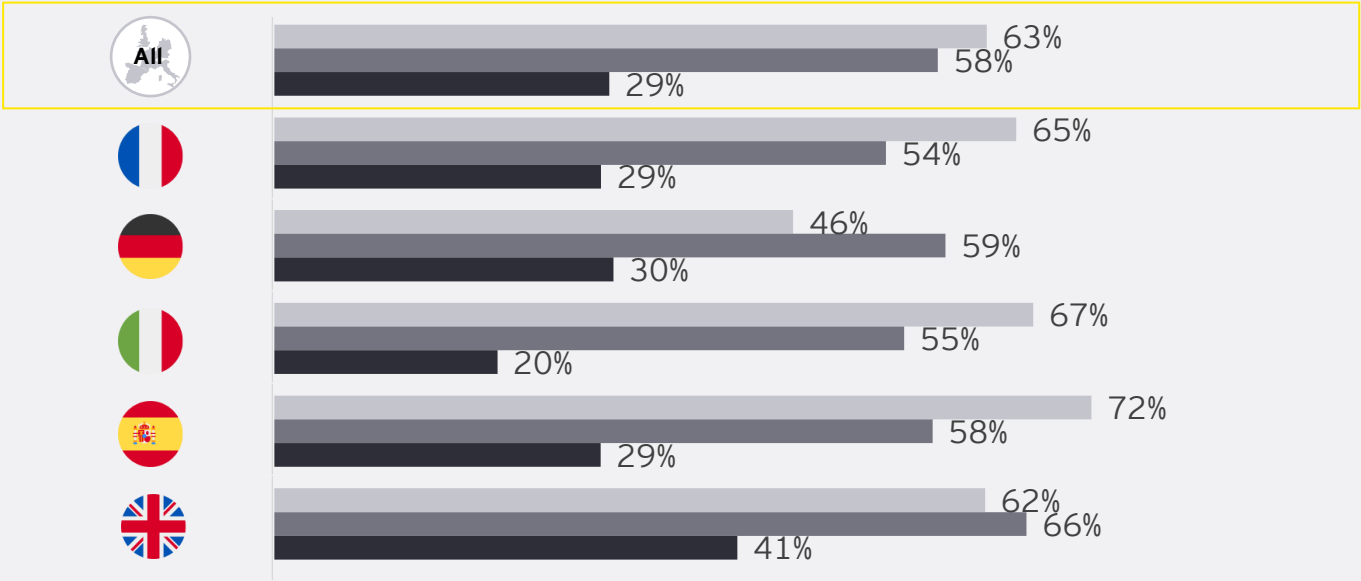
Leisure travel:

Destinations

In 2025, what will the main destinations for leisure trips be?

6 out of 10 people plan to travel within their country of residence. Travelers from Germany and the United Kingdom intend to travel more abroad than within their own country. The survey indicates that 55 million travelers from the other 4 analyzed countries are interested in visiting Spain as a travel destination abroad, making it the most preferred in Europe, followed by Italy (48 million travelers from the other 4 countries).

In my country of residence
 Abroad, Europe
 Abroad, outside Europe



Top 3 European destinations by country in travelers' intentions

2

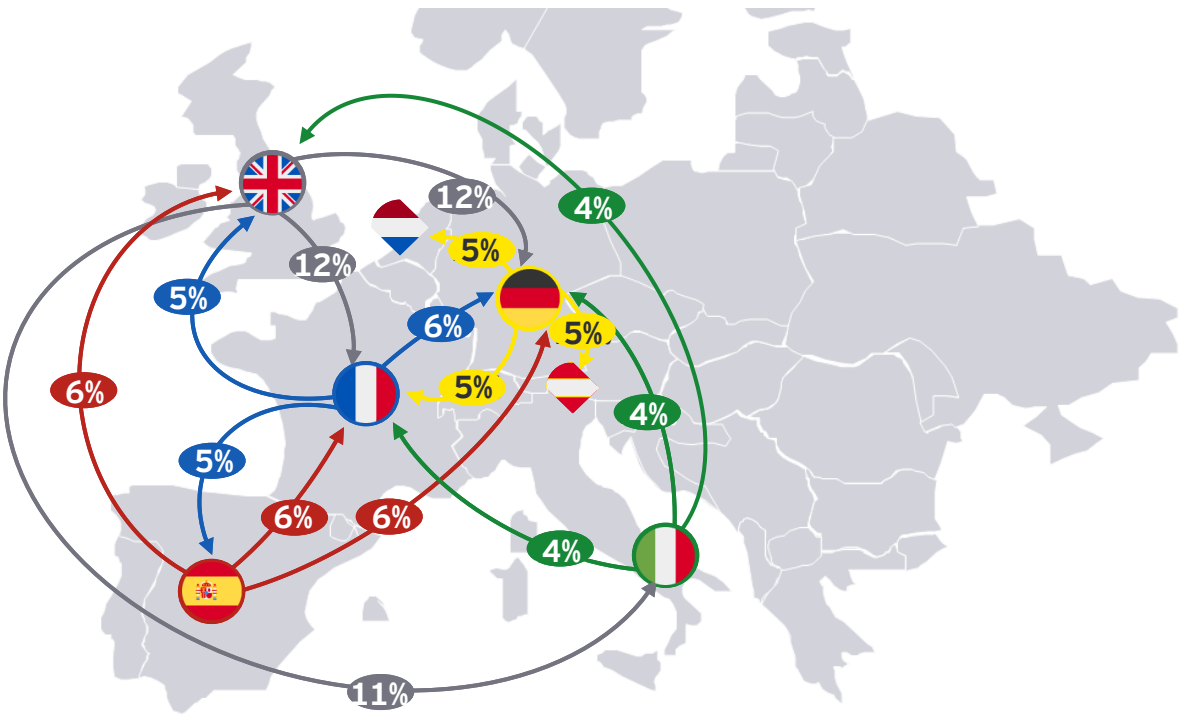
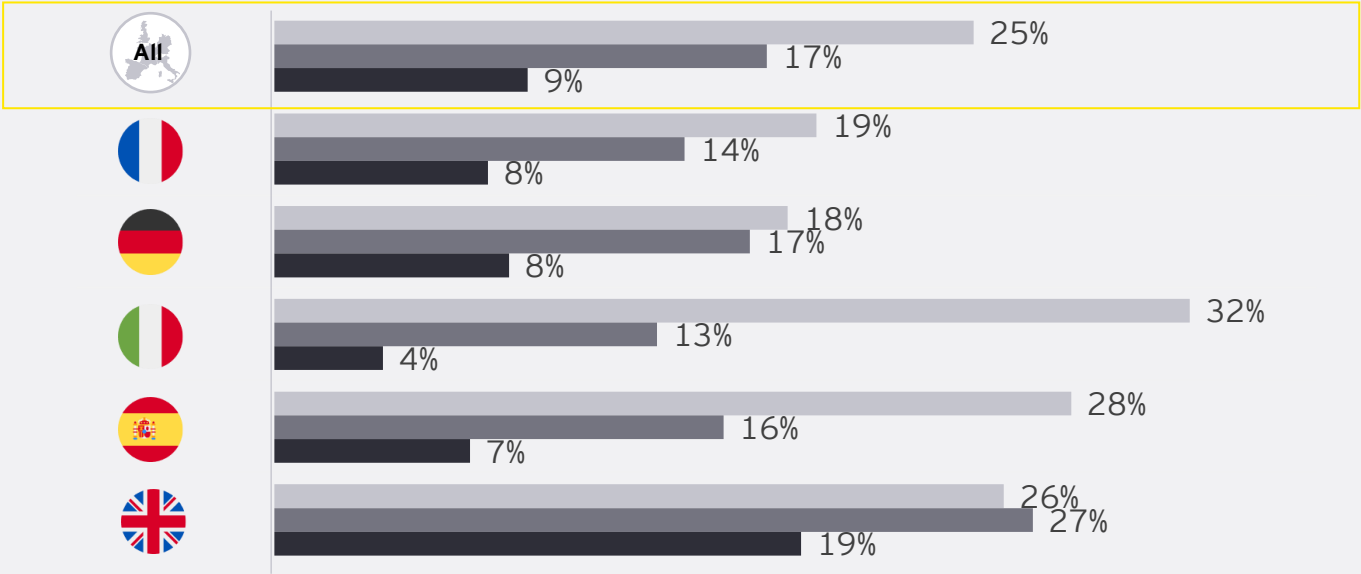
Business travel:

Destinations

In 2025, what will the main destinations for business trips be?

The study reveals that most people traveling for business purposes will stay within national borders, except for the United Kingdom where trips to Europe exceed those within the country of residence. In Italy, only 4% intend to travel outside Europe, compared to 9% of the overall average. The study indicates that 14 million travelers from the other 4 analyzed countries consider France as the destination for their business trips abroad, making it the top choice in Europe, followed by Germany and Italy.

In my country of residence
 Abroad, Europe
 Abroad, outside Europe



Top 3 European destinations by country in travelers' intentions

2

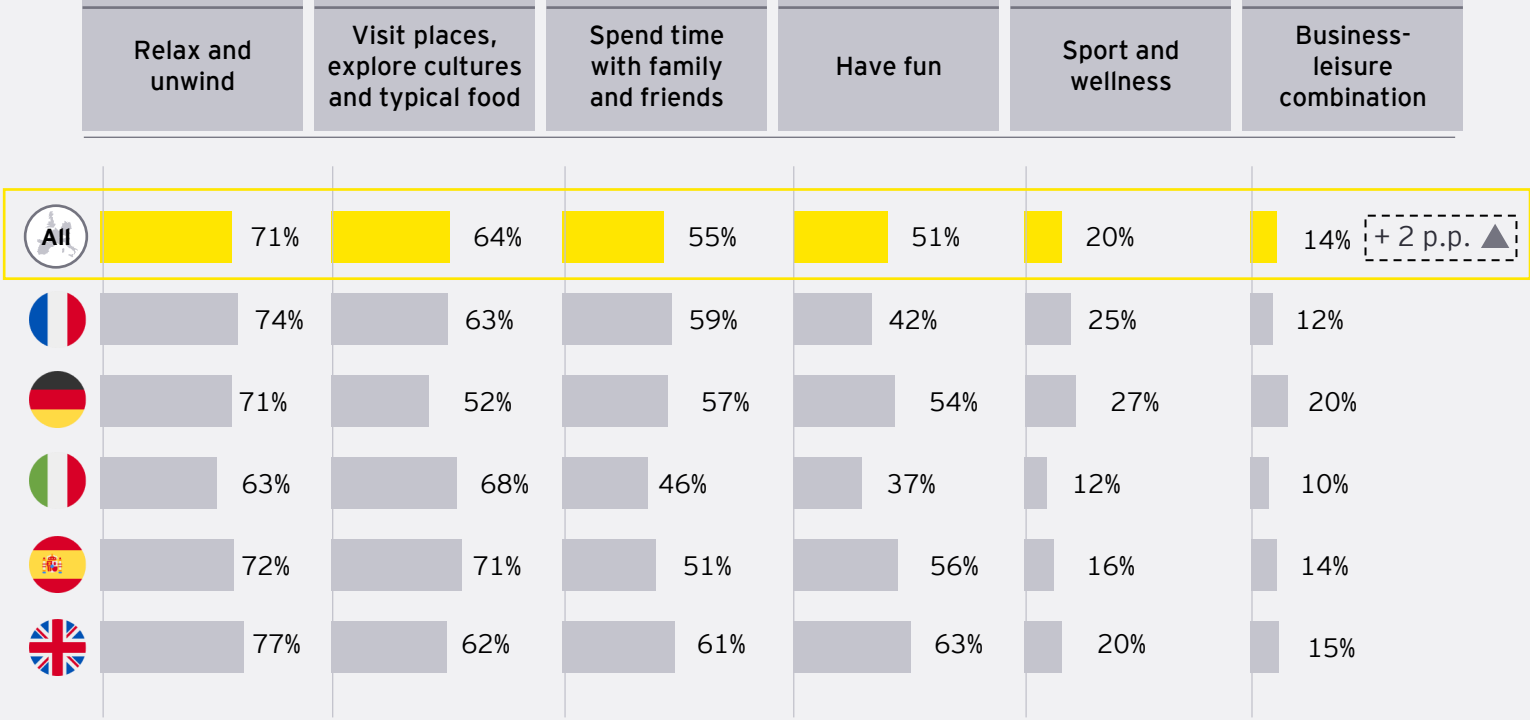
Leisure travel:

Reasons for traveling

What will be the motivations for leisure trips in 2025?

In 2025, vacationers will continue to travel primarily driven by the desire to relax (71%), visit places and explore different cultures (64%), and spend time with family and friends (55%). The percentage of those intending to combine business and leisure continues to grow (14%).

Travel reasons and drivers of choice



% calculated on 2025 leisure travelers



Main changes compared to the 2024 edition of the Observatory

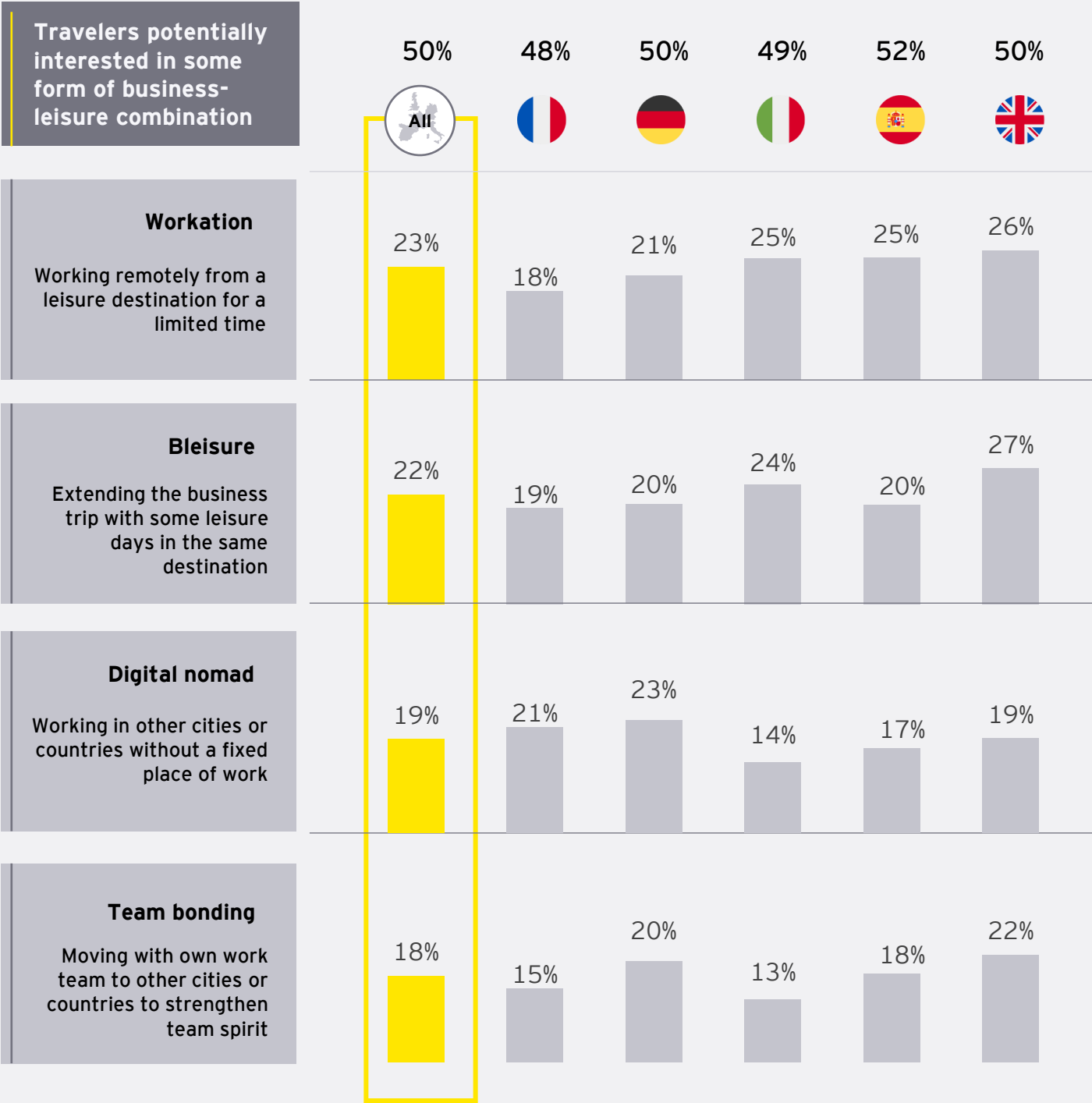
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Business-leisure combinations:

Emerging travel habits

How will travelers combine business with leisure trips?

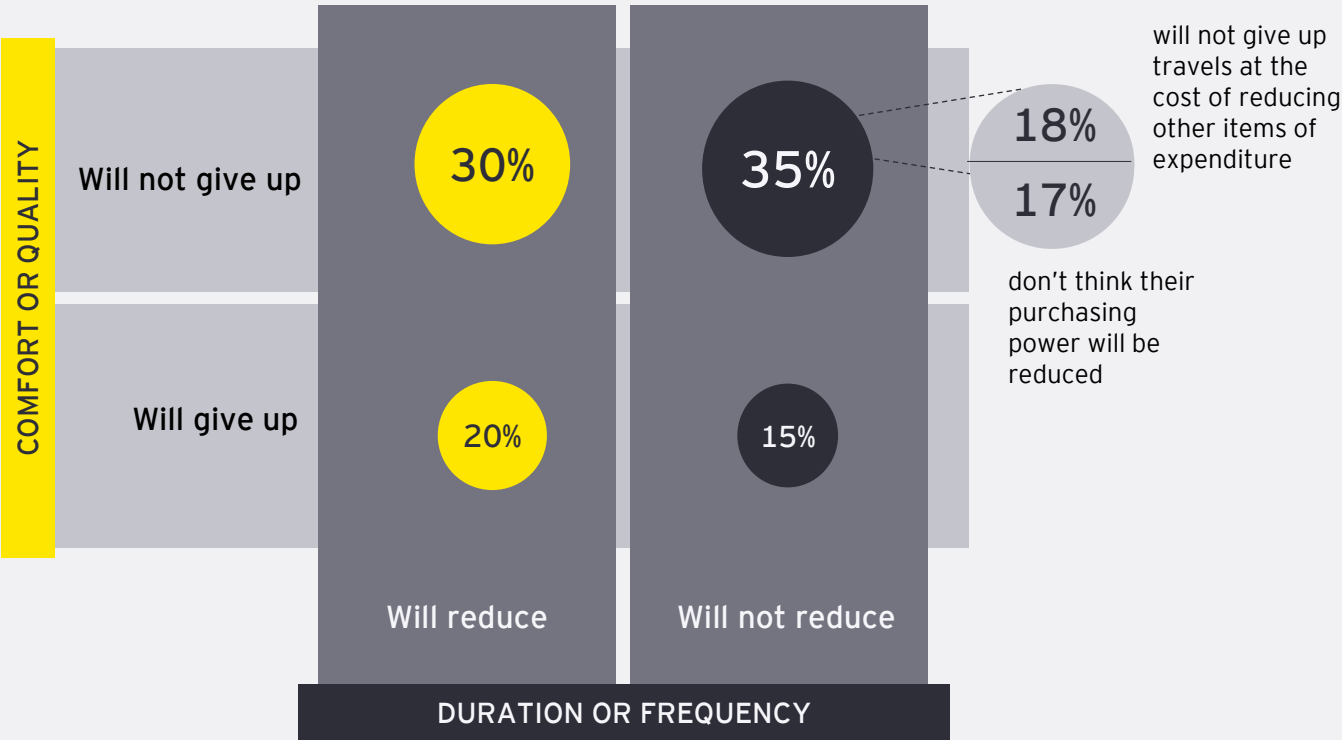
1 out of 2 people is interested in combining leisure and business trips in the future. Specifically, workation (working remotely from a vacation spot for a limited time) and bleisure (extending a business trip with a few leisure days at the same destination) are the two most attractive motivations for all countries, except Germany where there is an interest in carrying out business activities in other cities/countries without a fixed workplace (Digital nomad).



2

What impact will inflation have on travel habits?

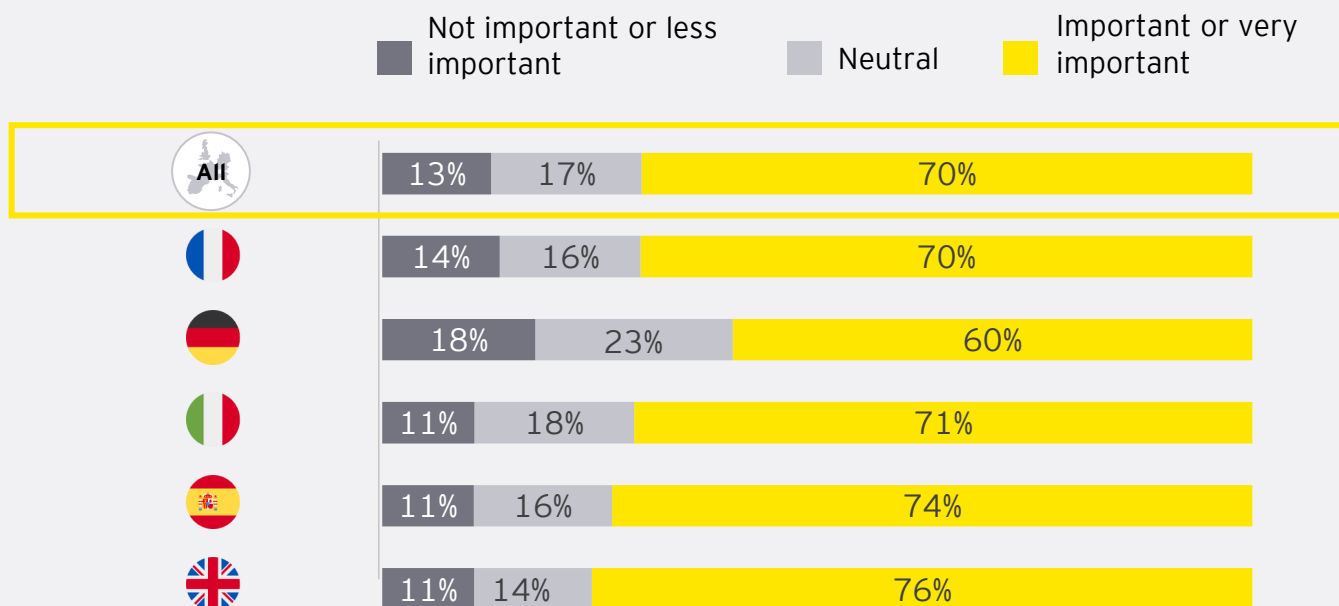
We investigated the effect of a possible decrease in purchasing power on travel. 2 out of 3 people might change their travel habits due to a decrease in purchasing power, a result already found in the 2023 and 2024 surveys. 30% would prefer to reduce the duration and frequency of trips rather than sacrifice comfort and quality. However, 1 in 5 will not give up travel at the cost of reducing other items of expenditure.



2

How important is the personalization of the travel experience?

In planning one's trips and choosing the modes of transport, 2 out of 3 people consider a personalized experience that takes into account their individual needs to be important. UK travelers place more importance than others on personalization (76%), especially when compared to Germany (60%).



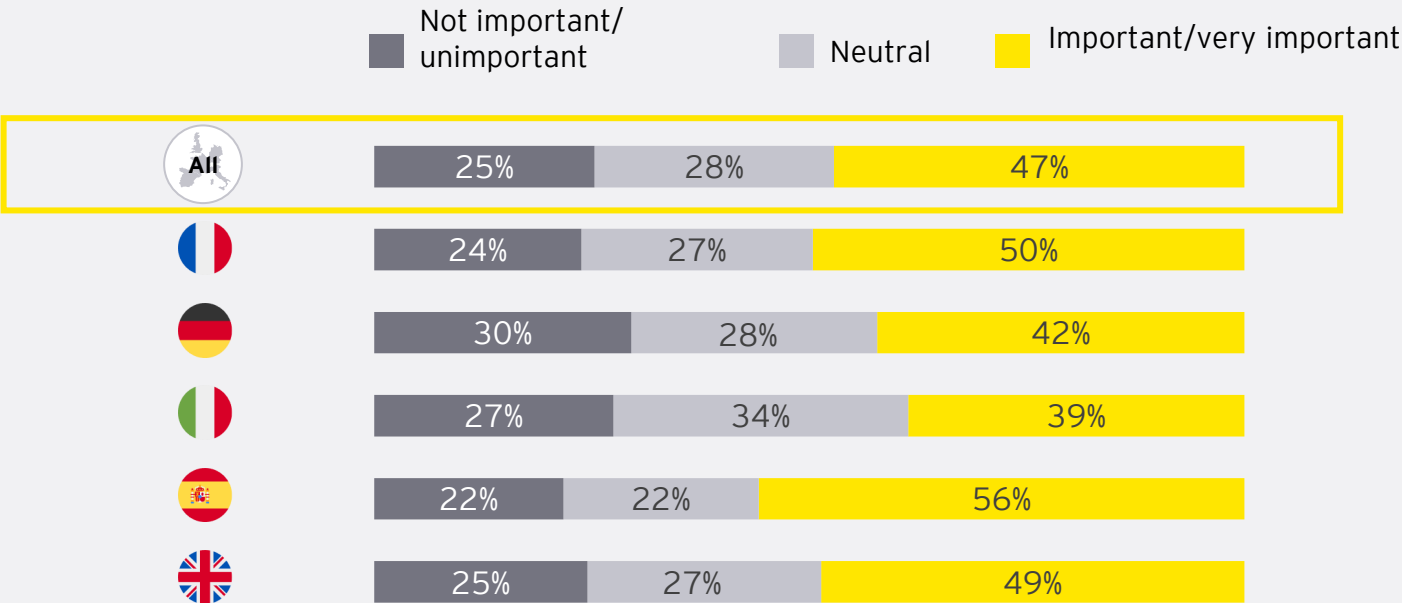
2

How important is environment impact in driving travel choices?

Several studies have highlighted the potential gap between ‘saying’ and ‘doing’ regarding sustainability-oriented travel behavior.

Explicit questions may result in answers that are not entirely truthful as they are more socially acceptable. We have therefore explored the issue of environmental impact from different perspectives, as outlined in the following paragraphs.

When asked explicitly, 1 in 2 people consider environmental impact an important/very important factor in their travel choices. This assessment is particularly prevalent in Spain in line with last year, while it has declined slightly in other countries.



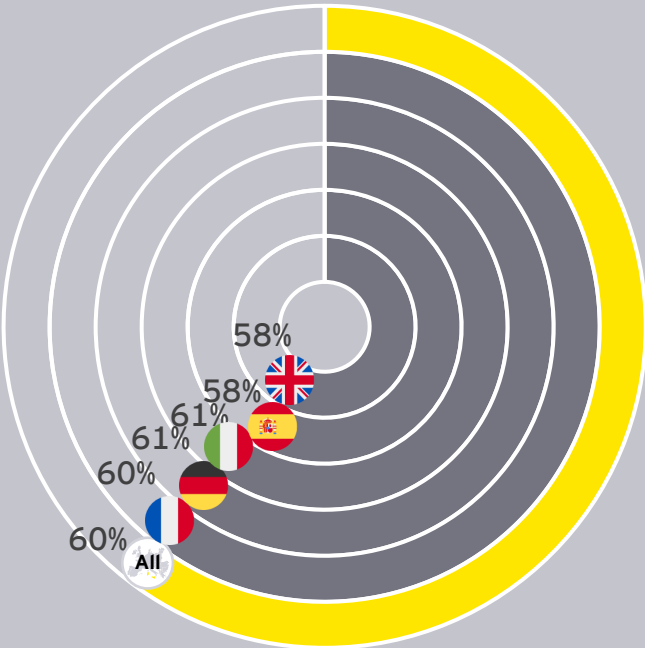
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Implicit attitude toward environmental issues

Neuroscientific tests, specifically of the Implicit Association Test (IAT) type, have been conducted that indicate that an implicit attitude of inclination towards nature and environmental issues is prevalent in all countries, albeit decreasing since the 2024 survey.

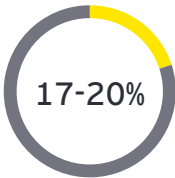
Implicit attitude of concern towards environmental issues

- 4 p.p. ▼
In particular:
Germany: - 6 p.p.
Spain: - 7 p.p.
United Kingdom: -8 p.p.

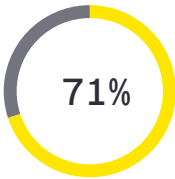


Investigation of intentions and actual behaviour

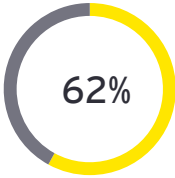
When asked about the main factors influencing travel choices, participants had to balance environmental impact with other factors. A sustainable travel experience was cited as the main factor by 20% for leisure travel and 17% for business travel.



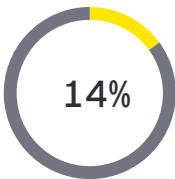
When asked about their actual behavior in the past, only one third of the participants stated that they had never made travel choices with sustainability in mind.



62% did not exclude the willingness to pay an extra cost to offset carbon emissions from flights.



Approximately 1 in 7 people indicated that information on sustainable travel options was among the top 4 services related to air travel that could be decisive in influencing their choice.



What do these results suggest? Environmental impact is a factor that potentially influences the choices of many travelers. Actual behavior clearly depends on the influence of competing factors, but also on the availability of information and commercial offers on sustainable travel options.

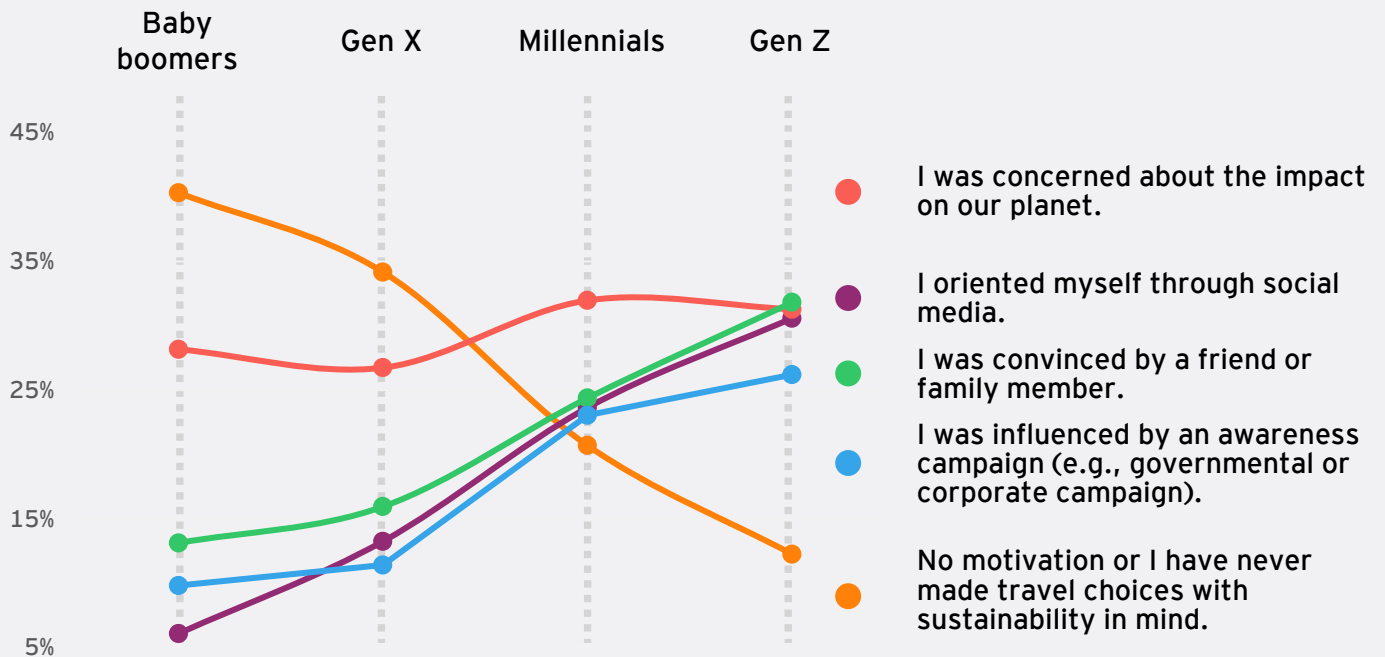
Main changes since the 2024 edition of the Observatory

2

What are the reasons behind sustainable travel choices?

Our survey probed the motivations behind travel choices made with sustainability in mind, studying how the generational dimension relates to these choices.

Younger generations are generally more likely to make sustainable travel choices, driven by concern for environmental impact, and are more influenced in this regard by social media and friends / family.



2

What should the transport and travel industry do to help you make more sustainable and eco-friendly travel choices ?

With the help of Generative AI, the answers were grouped into 5 clusters, excluding about 35% of the sample who did not express an opinion. The percentages shown are for those who did express an opinion. Some of the suggestions associated with the cluster are given as examples. The demand for more information and options and for better offers emerges clearly, increasing by 4 p.p. compared to the 2024 survey.

Travelers' expectations about eco-sustainability

41% More information and eco-friendly offers

- "Giving more information"
- "Information campaigns"
- "More clarity"
- "Provide correct information on the real scope of strategies' sustainable without green washing"
- "Raise more awareness"
- "Orient and support me"
- "Helping passengers with sustainable planning"
- "Propose sustainable packages clearly as alternatives to the classics"
- "Operators should offer sustainable products"
- "Give more information on this"

31% Economic incentives for eco-friendly choices

- "Don't increase prices"
- "More discounts"
- "Incentives"
- "Promotions"
- "Balancing prices in a way that guides me towards sustainable choices"
- "Reduce prices for sustainable alternatives"
- "Increase prices for more ecologically impactful trips"
- "A good product at a good price"
- "Do more promotion"
- "Attractive packages"

11% Greater transparency

- "More information and comparisons on emissions"
- "Be clear and honest"
- "Communicate data on their environmental impact"
- "Present the different alternatives to cover the route with an indication of the environmental impact"
- "Explain with certified data the lower environmental impact of their solutions"

11% Renewables and eco-friendly practices

- "Reduce emissions"
- "Consume less energy less paper fewer resources"
- "Improve intramodality for sustainable modes of transport such as rail and improve the offer of cross-border services"
- "New engines and new synthetic fuels"

6% Technology and innovation for sustainability

- "Introduction of electric vehicles"
- "Replace all vehicles with environmentally friendly vehicles"
- "Always try to fill vehicles"
- "Improve fleets, optimize routes"



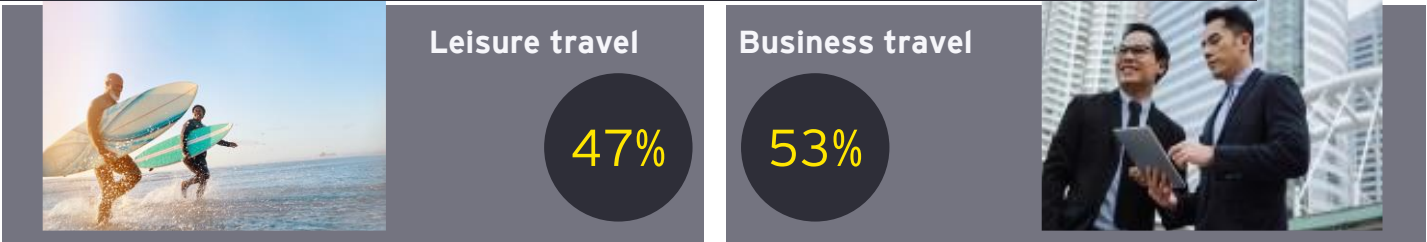
2

Train use and inclinations in 2025

Intentions and preferences related to train travel

The train is the third most used means of transport by travelers, both for leisure (47%) and for business trips (53%).

Train as one of the main means of transport for:



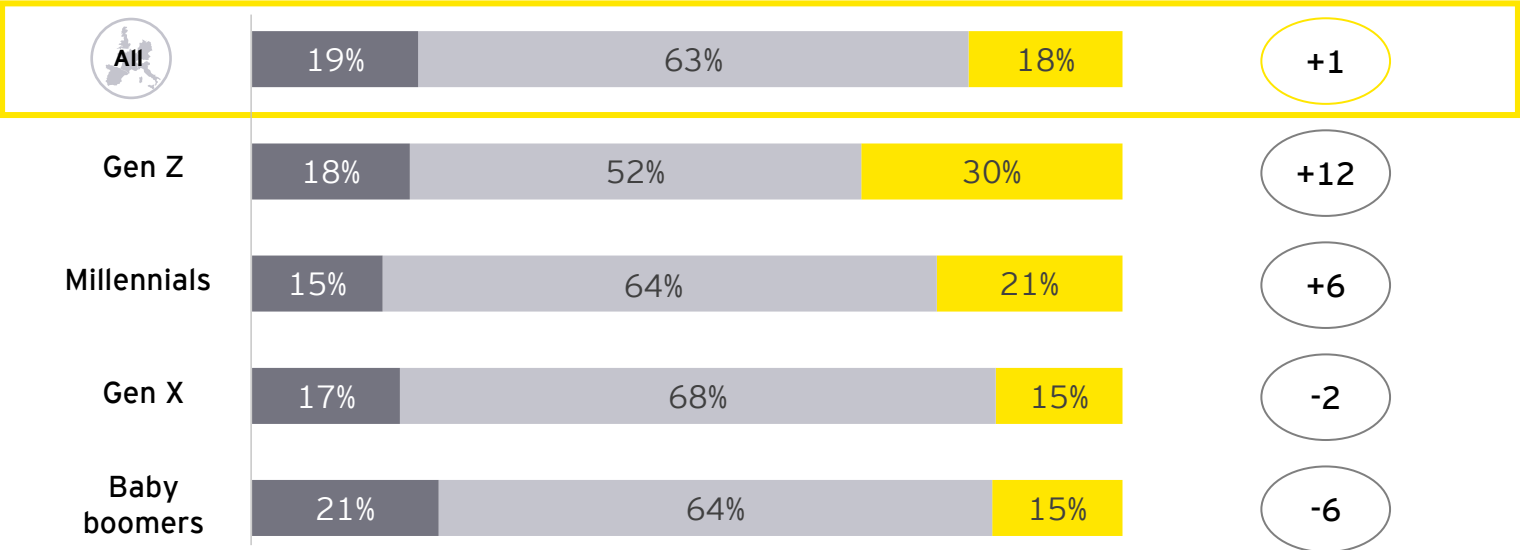
% calculated on leisure travelers

% calculated on business travelers

The data suggest an increase in train travel for leisure purposes especially for the youngest generation: 1 out of 3 intend to increase the number of rail journeys compared to 2024.

Inclination towards train travel for leisure purposes in 2025

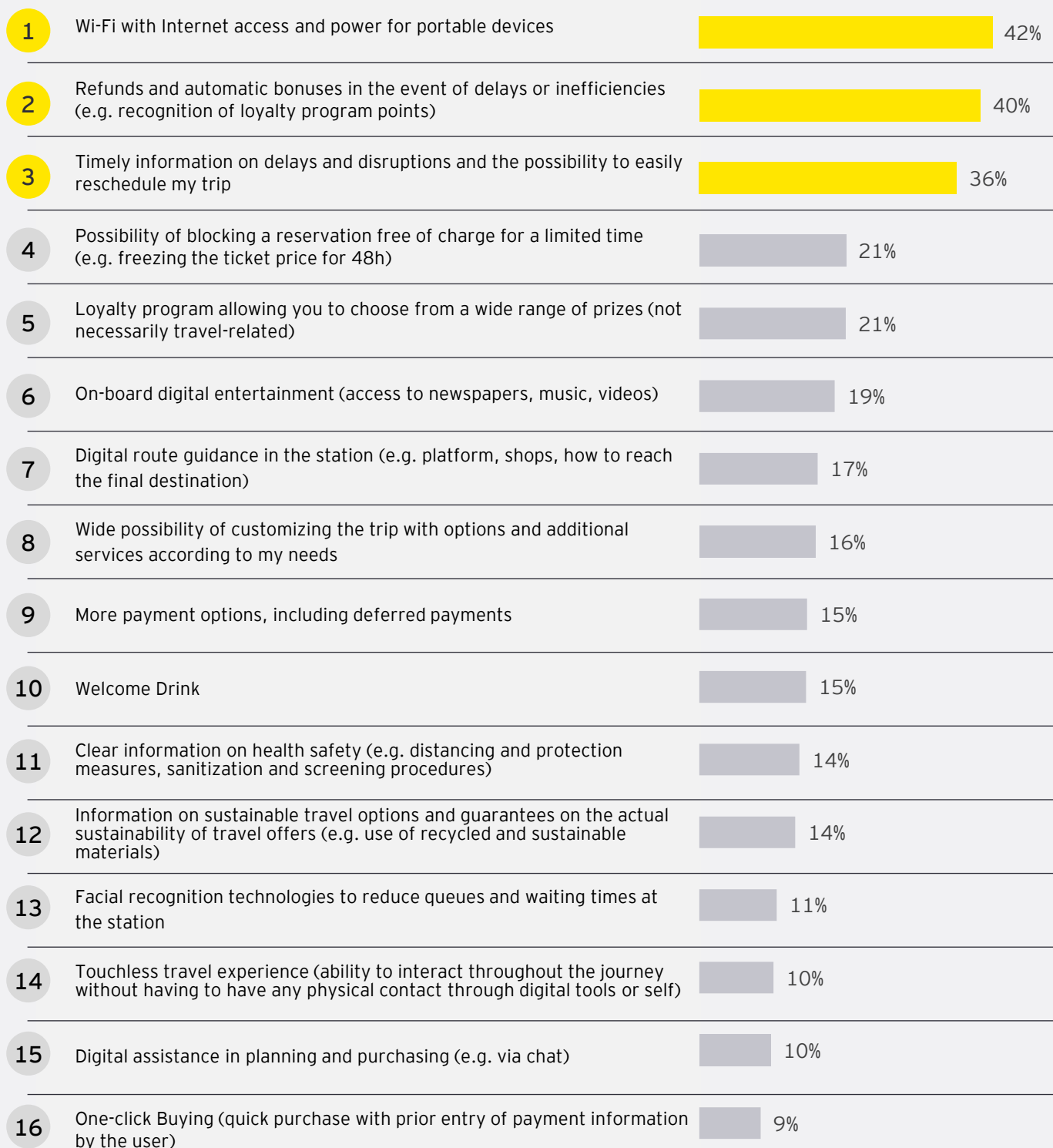
I will limit the number of trips compared to 2024
 I will have the same travel habits as in 2024
 I will increase the number of trips compared to 2024
 Difference between the % of those who say they will increase the number of trips vs. those who say they will reduce them



2

What are the most requested free services for train travel?

The sample was asked to indicate the four main services that would be decisive in choosing the train as a mode of transport. The main free services requested for train travel are those related to the availability of Wi-Fi with internet access and power supply (42%) and the management of delays and disruptions (40%) would like automatic refunds and bonuses and 36% would like to receive timely information about these).



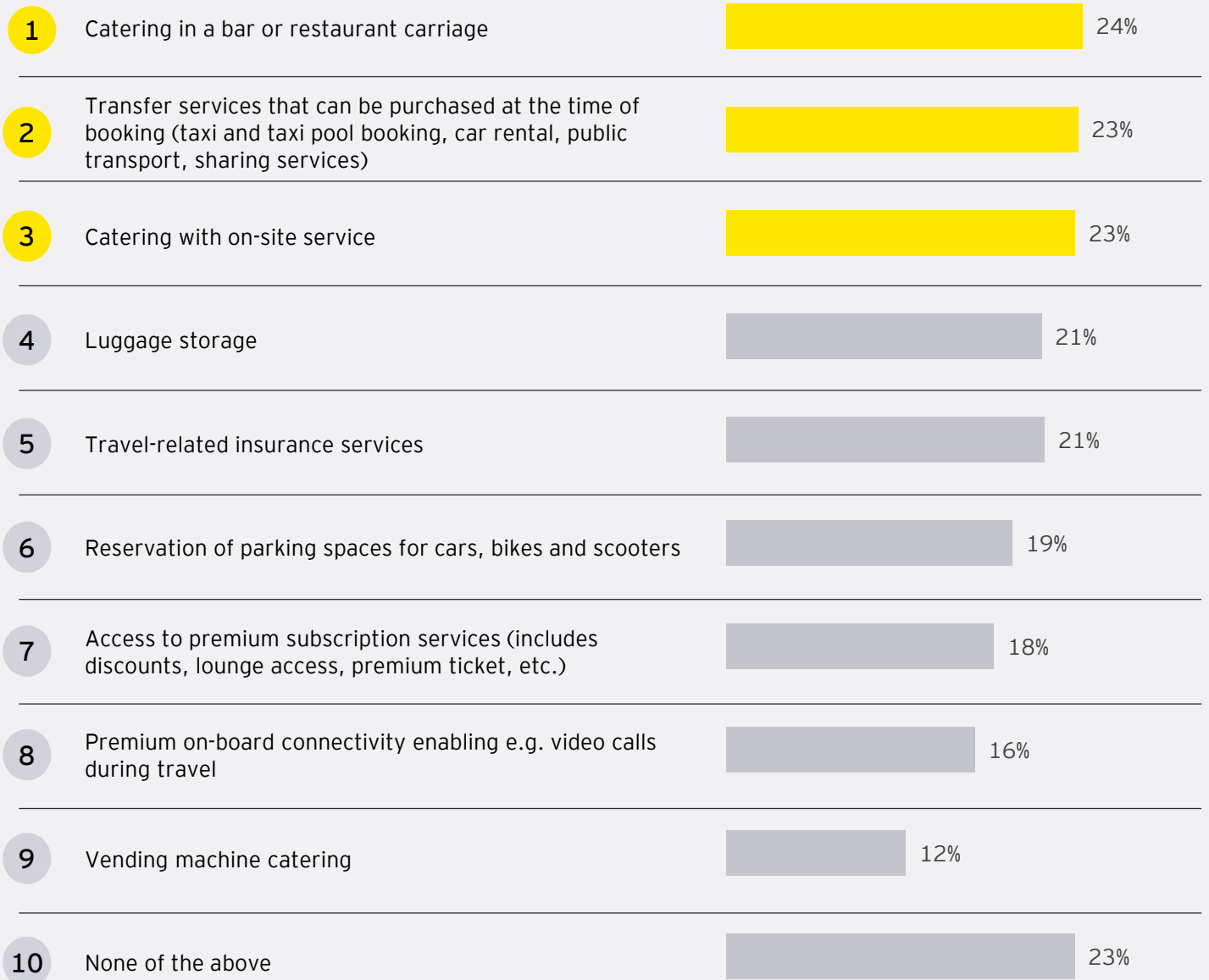
2

What are the ancillary services that travelers would purchase in addition to the cost of the train ticket?

The sample was asked to indicate the 3 main ancillary services that could be decisive in their choice of train as a mode of transport.

Approximately 3 out of 4 people are willing to purchase additional services at a higher price or in addition to the cost of the train ticket. Significant interest is confirmed in catering (47%), either with service at the seat or in the bar or restaurant carriage.

Other preferred services are related to solutions that simplify the door-to-door travel experience, such as the possibility to purchase transfer services during the booking phase (23%) and luggage storage (21%). Insurance services are also among the most popular (21%).

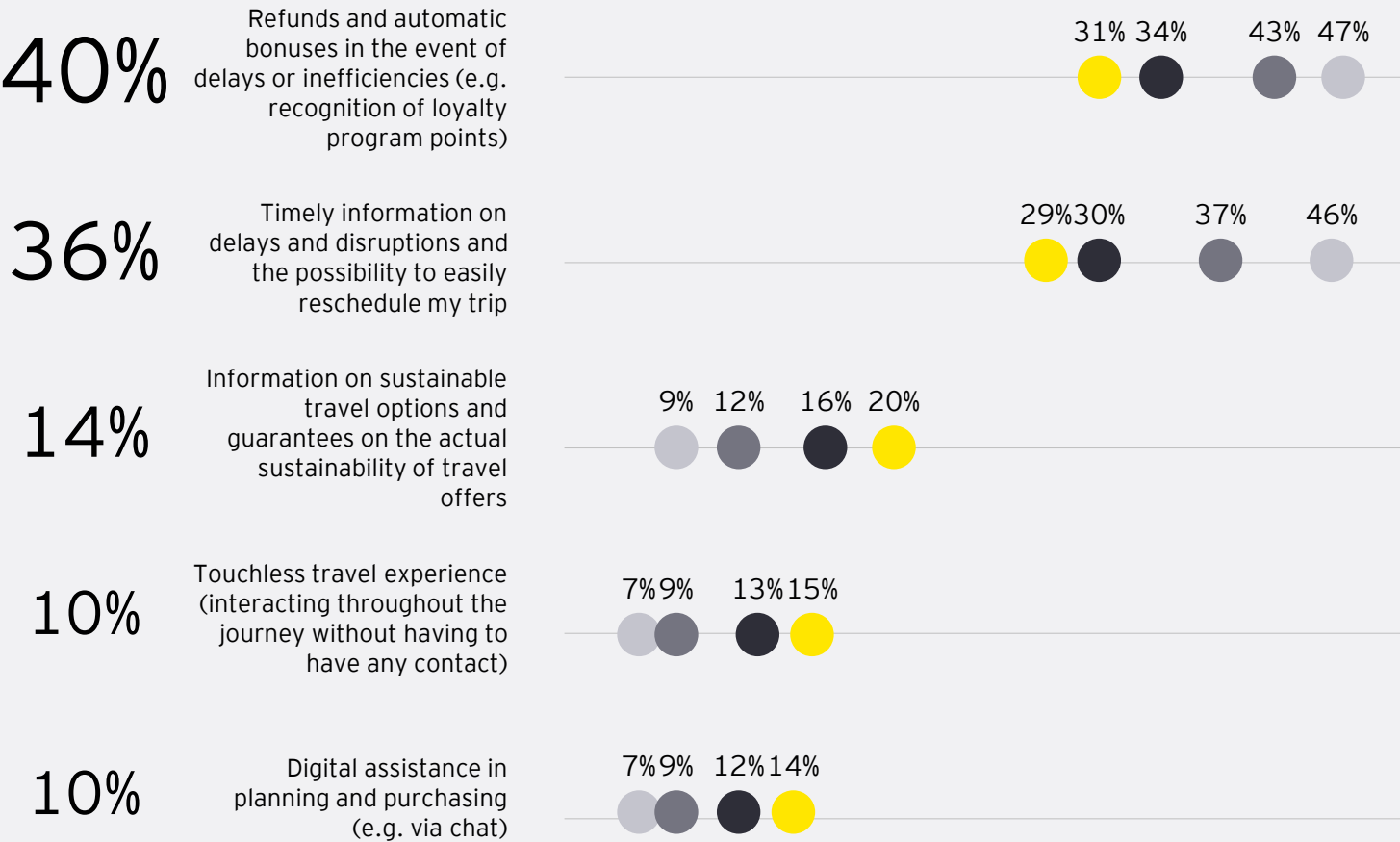


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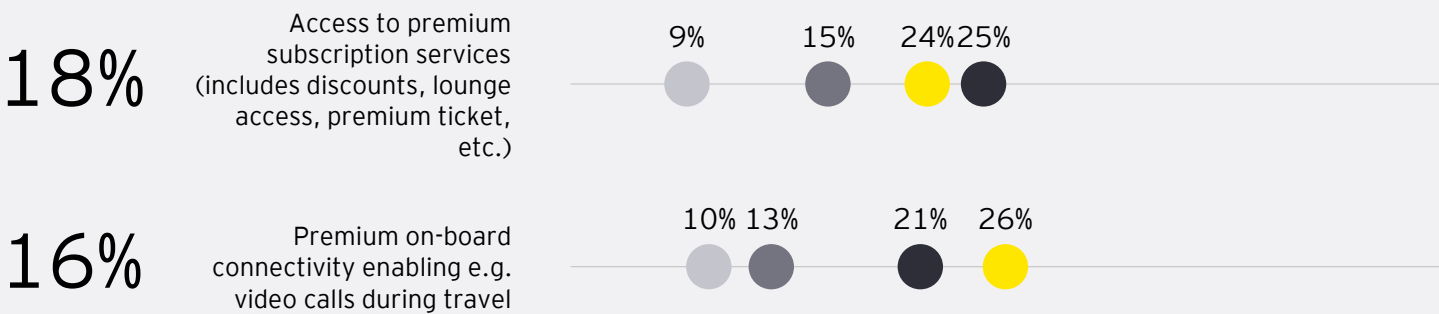
Generational differences in services required for train travel

Generational differences in the services required for train travel show a greater interest of the older generation in free services related to delays: automatic refunds and bonuses and timely information on disruptions. However, Gen Z stands out for a higher interest in free services related to sustainability (+6% vs. all) and digital (+5% vs. all for touchless travel experiences and +4% for digital assistance in planning). Regarding paid services, Millennials show a significant preference for access to premium subscription services (+7% vs all), while Gen Z is particularly attracted to premium on-board connectivity (+10% vs all).

Free services:



Ancillary services:



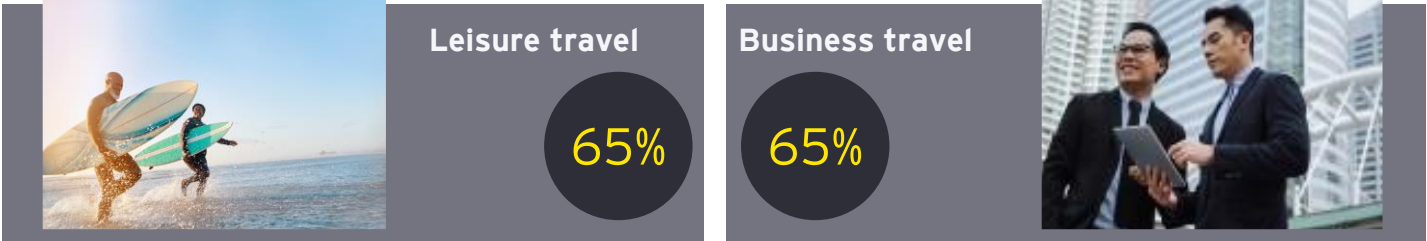
2

Air travel use and inclinations in 2025

Intentions and preferences related to air travel

Air is the second most popular mode of transportation for leisure travel, and the first for business travel.

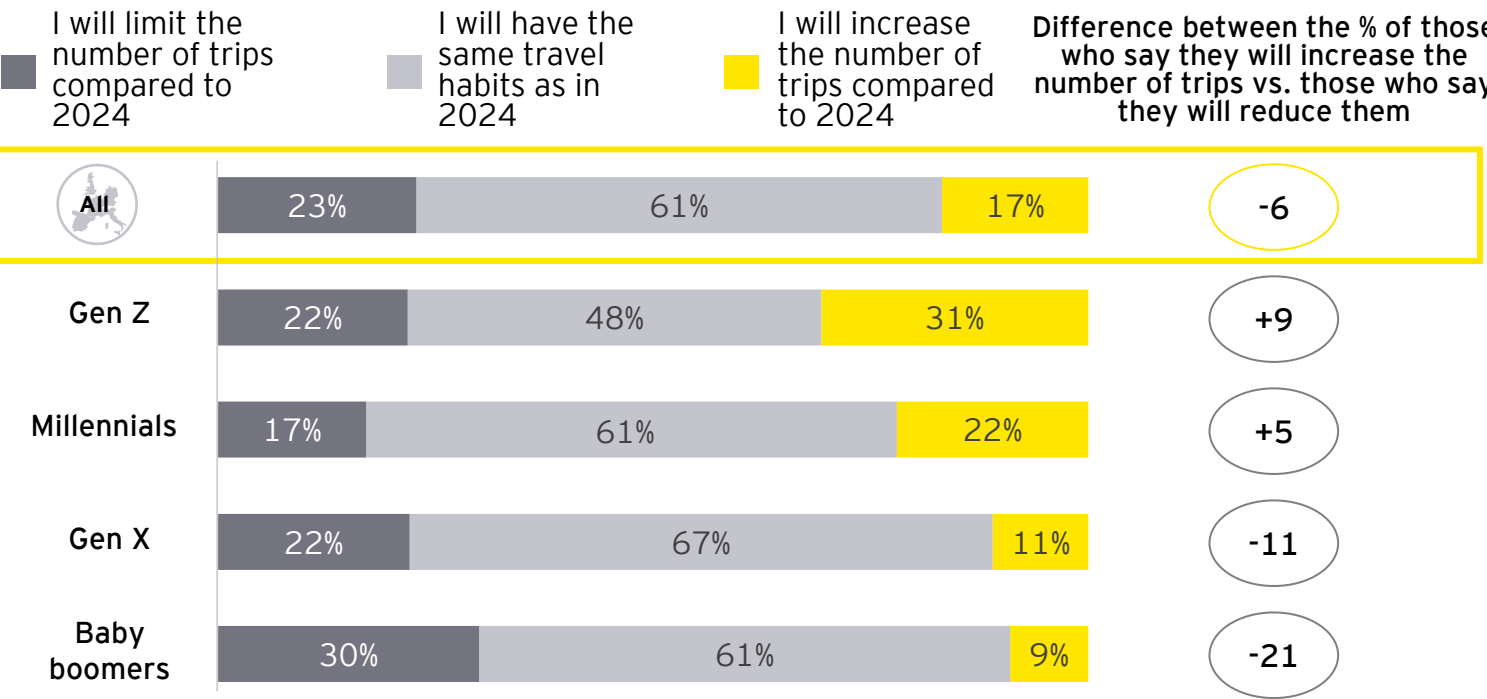
Air travel as one of the main modes of transport for:



% calculated on leisure travelers % calculated on business travelers

The data suggest an increase in air travel for leisure purposes especially for the youngest generation: 1 out of 3 intend to increase the number of air trips compared to 2024.

Inclination towards leisure travel by air in 2025

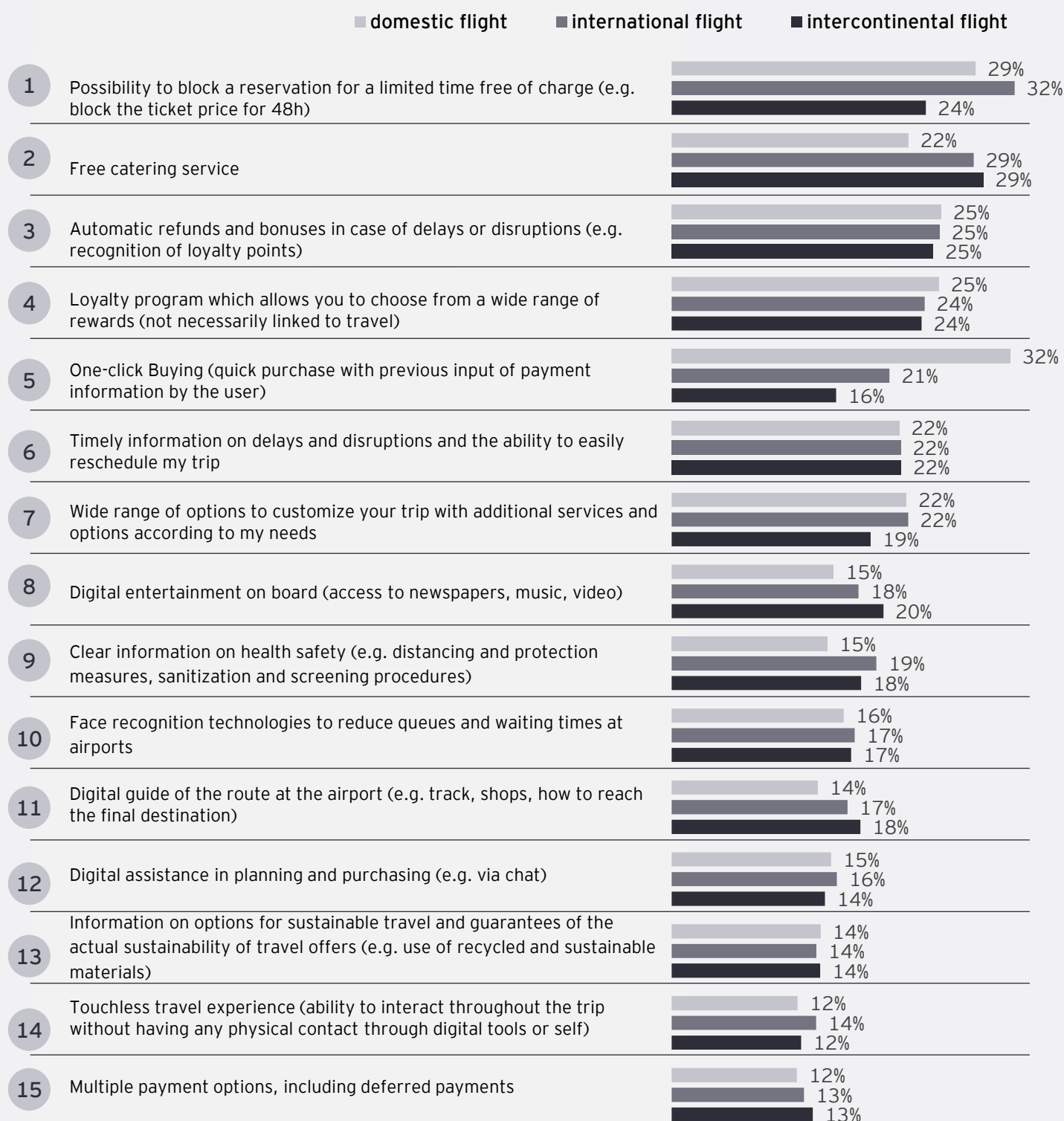


2

What are the most popular free services for air travel?

Free blocking of a reservation for a limited time and free catering are the preferred services, especially for international flights. Services related to handling delays and disruptions (automated refunds/bonuses and timely information) are also among the top choices for all types of flights.

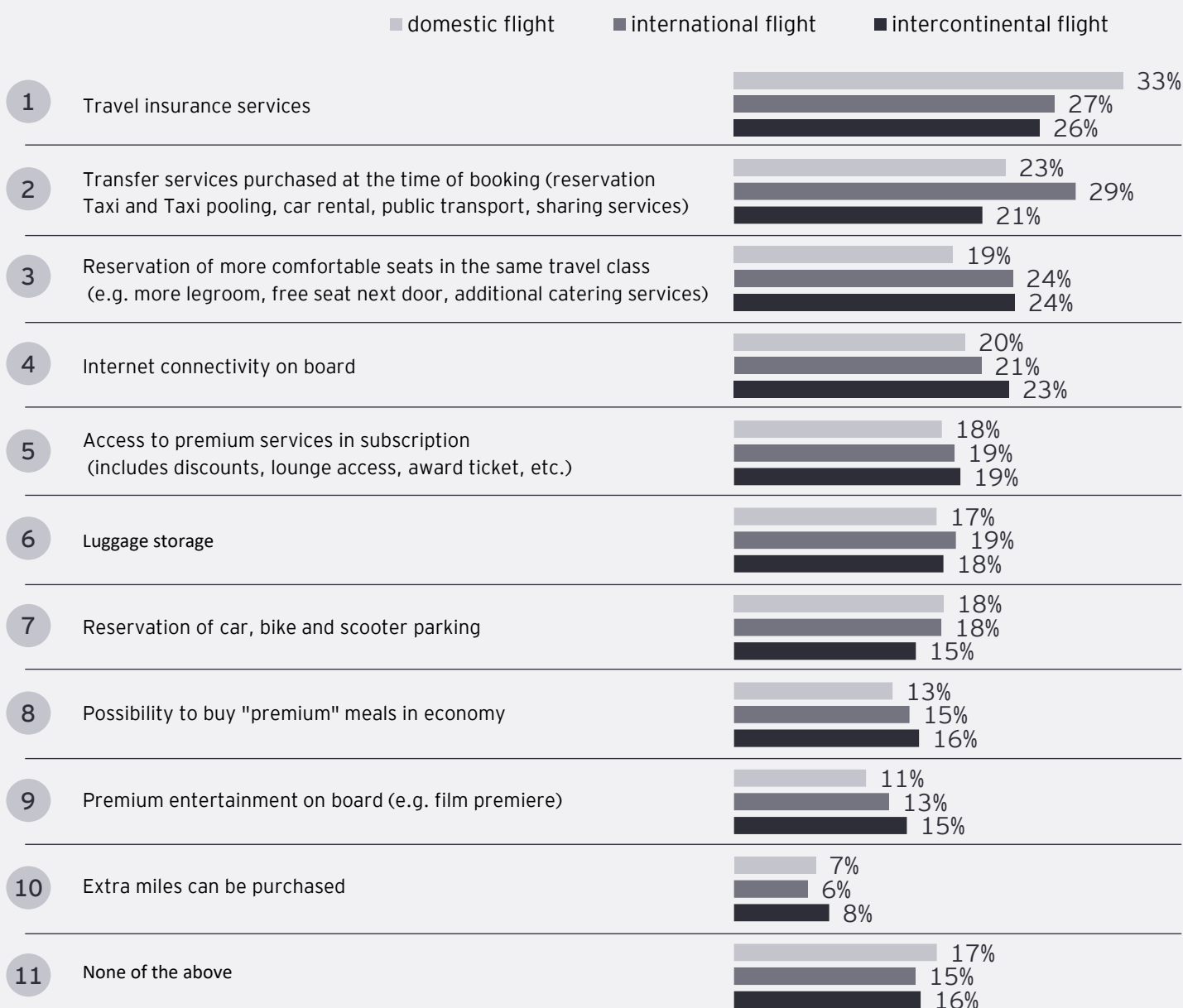
Travelers on domestic trips are more attracted by the possibility of One-click Buying (32%)*.



2

What are the ancillary services that travelers would purchase in addition to the cost of the flight?

More than 80% of the sample are willing to purchase ancillary services at a higher price or in addition to the cost of the plane ticket. There is interest in insurance services linked to travel, especially for domestic flights (33%), and the possibility of purchasing transfer services during the booking phase (29% for international flights). Other preferred services are booking more comfortable seats (24% for international and intercontinental flights), in-flight Internet connection (about 1 in 4 people), and access to premium subscription services (about 1 in 5 people)*.



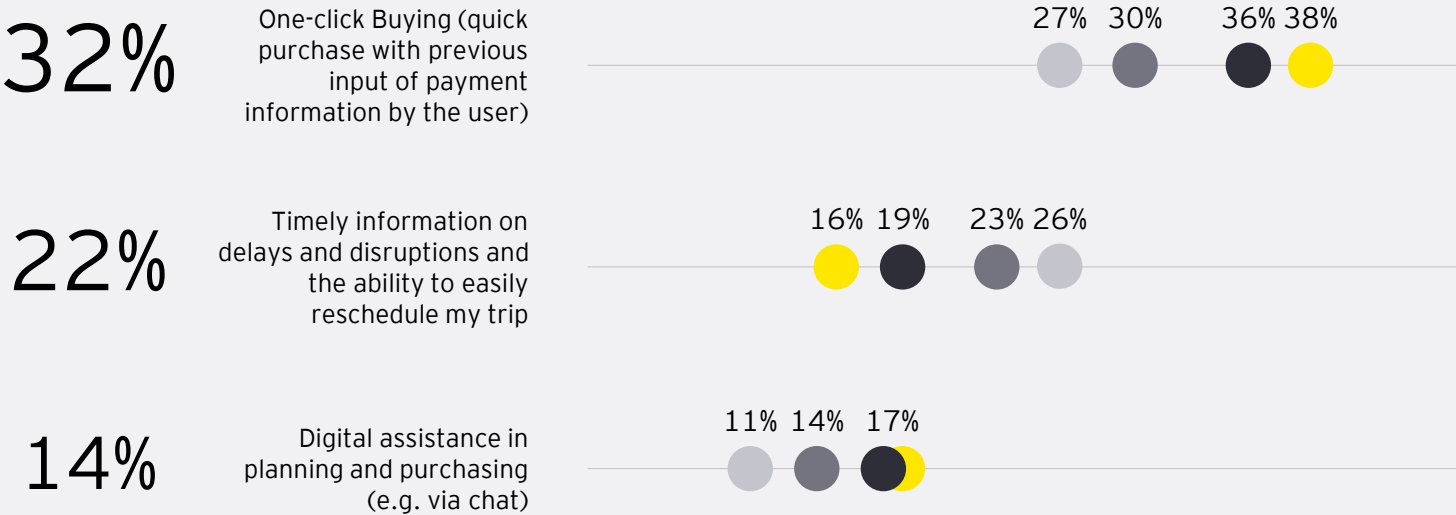
2

Generational differences in air travel services

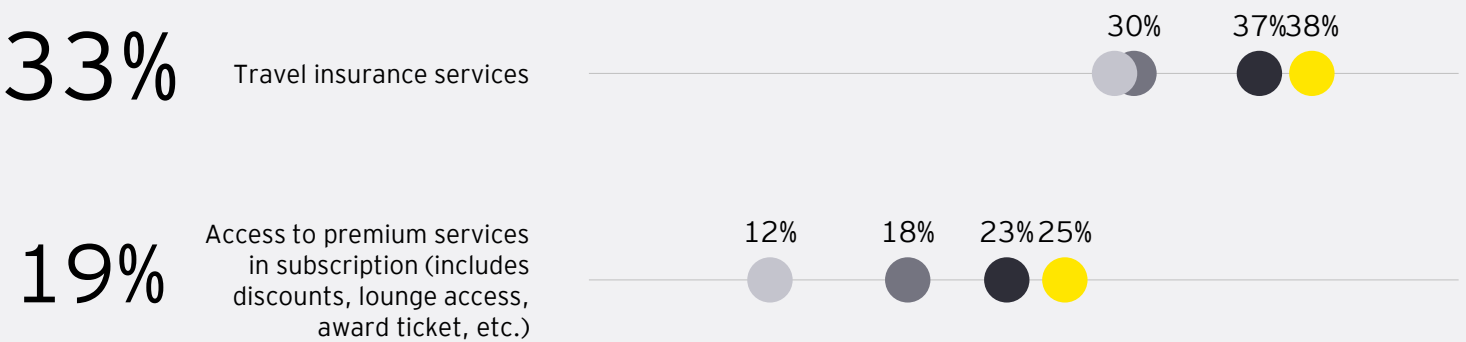
Intentions and preferences related to air travel

The generational differences are clearly apparent in the services required for air travel, with Gen Z showing a marked preference for quick purchase (38%) among free services, higher than the sample average (+6%). Baby boomers tend to prefer timely information on delays and disruptions and the ability to easily reschedule their trip (26%), compared to the average (+4% vs all). Gen Z shows particular interest for some paid services: 38% for travel insurance services (+5% vs all) and 25% for premium subscription services, also above average (+6% vs all).

Free Services:



Ancillary services:





In recent years, some tourist destinations have been affected by overtourism, making it difficult for visitors to enjoy the experience and causing discomfort for residents.

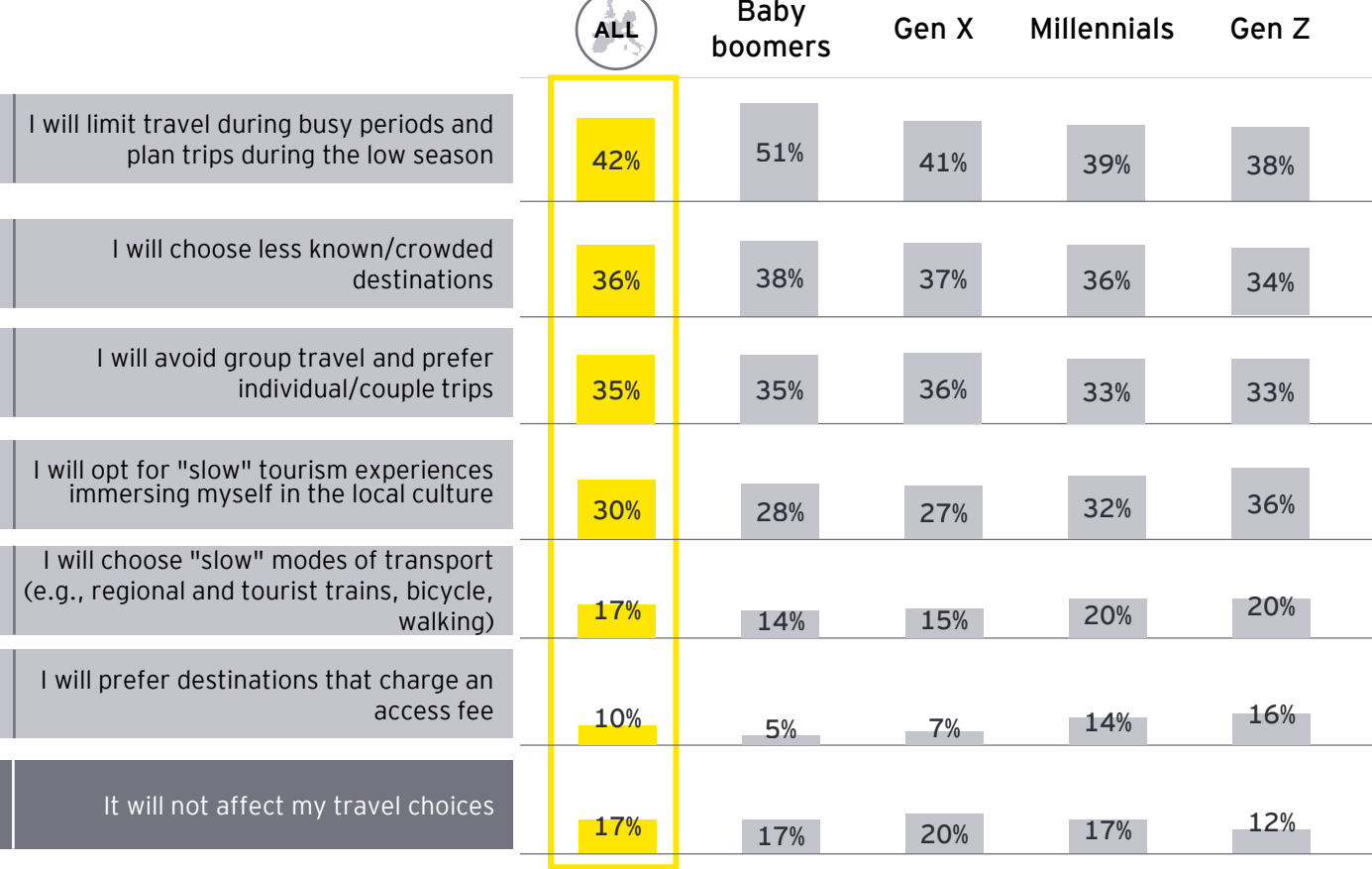
It is useful to investigate how overtourism may influence travelers' future behaviors.

How will overtourism affect your future travel choices?

4 out of 5 people will change their travel choices due to Overtourism.

A significant portion of travelers will limit travel during peak periods by planning trips during the low season (42%), especially among Baby Boomers (51%), or choose less well-known destinations (36%). 35% will avoid group travel, preferring individual or couple trips.

A significant percentage, especially for Gen Z, will also opt for "slow" tourism experiences (30%) by immersing themselves in the local culture.

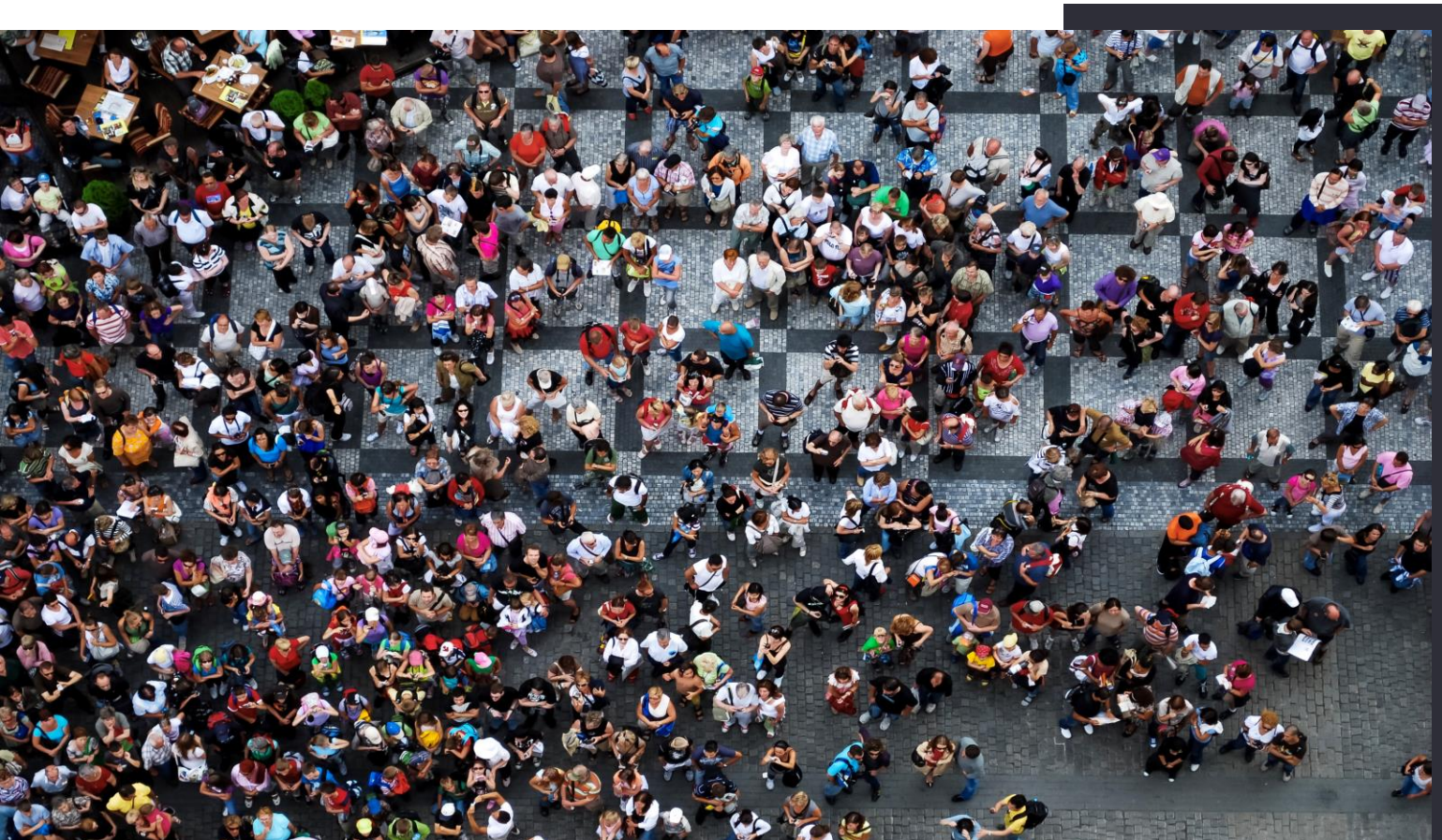
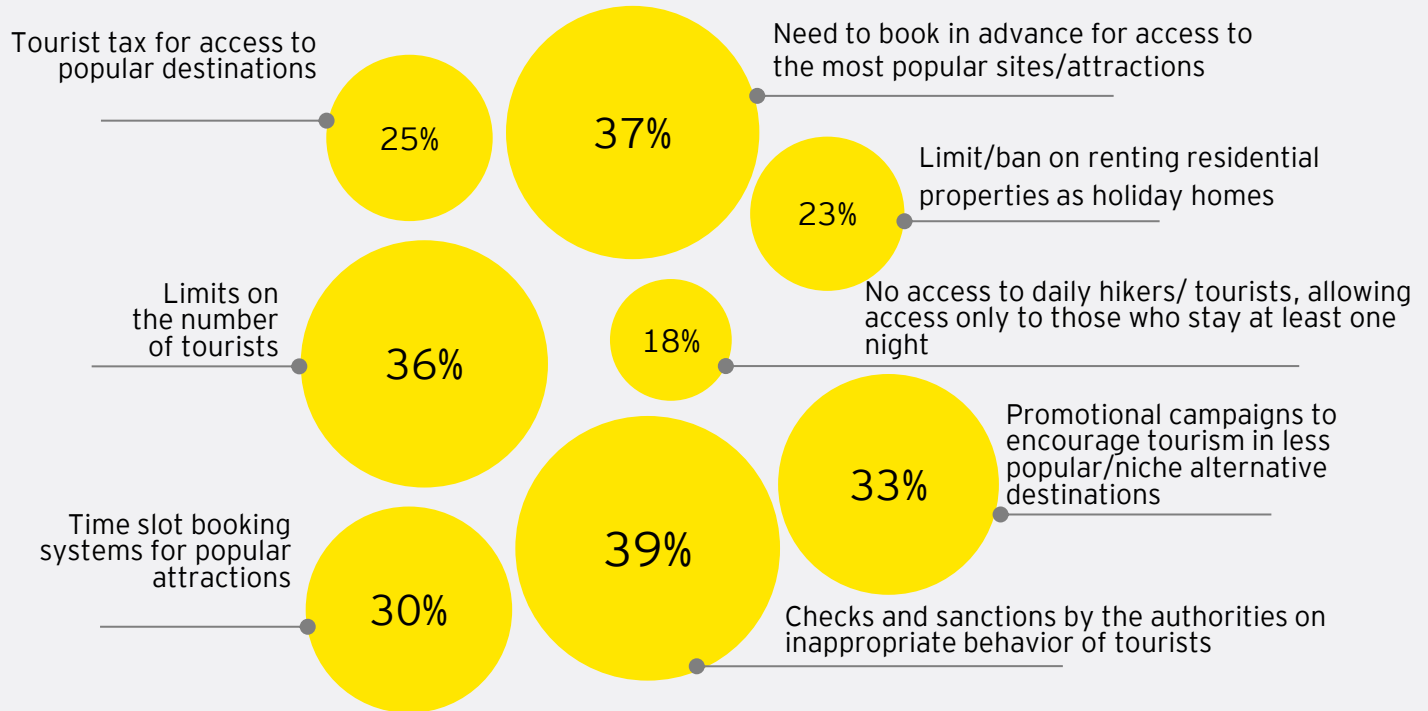


The influence of overtourism on travel choices

3

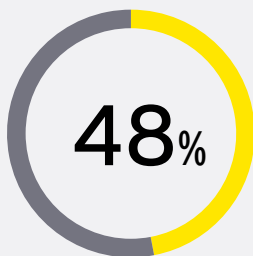
Which of the following policies/measures would you accept in order to limit the negative impacts of overtourism?

Controls and penalties for inappropriate tourist behavior are the most widely accepted measures to reduce the negative impacts of overtourism (39%). Second place, with 37%, is the need to book more popular sites/attractions in advance, a measure particularly favored by travelers from the United Kingdom, where the percentage reaches 46%. Finally, the introduction of a limit on the number of tourists is indicated by 36% of the sample, which rises to 44% among travelers from France.



4

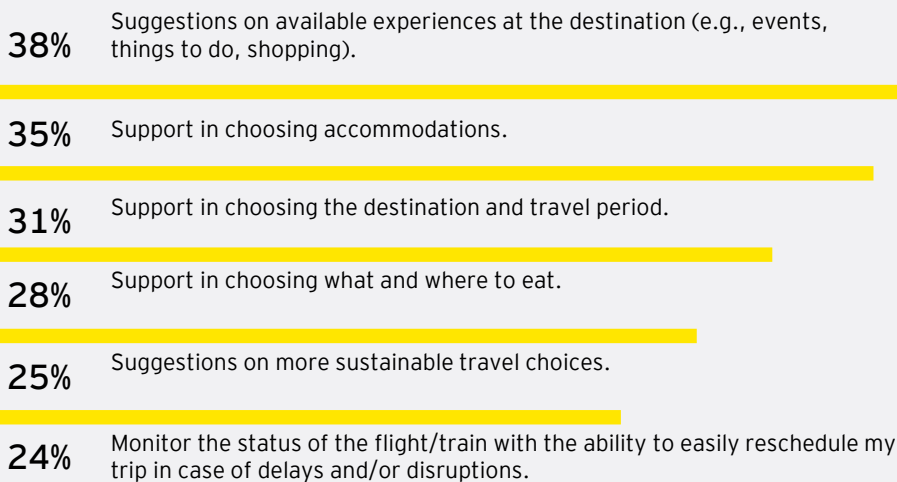
Artificial intelligence promises to transform the traveler experience. It can provide ideas and suggestions, simplify planning and booking activities, and offer real-time assistance, offering a more personalized travel experience. Travelers are particularly interested in using AI for recommendations on available experiences at their destination and for choosing accommodations.



Travelers who would use a virtual assistant powered by Artificial Intelligence (AI) to plan a trip



For what purposes would you use a virtual assistant powered by AI?



The influence of Artificial Intelligence on travelers

4

How a future in which Artificial Intelligence is part of the traveler experience is perceived

Participants were asked to think about a future where travelers interact with Artificial Intelligence tools to plan and manage their trips. What adjectives would describe it? The responses were grouped into 6 clusters based on prevailing sentiments. For each cluster, some examples of responses are provided.



Positive associations with AI

26%

Innovation, Intelligence

- "Innovative"
- "Futuristic"
- "Smart"
- "Modern"
- "Technological"
- "Intelligent"

18%

Practicality, Usefulness

- "Useful"
- "Efficient"
- "Excellent"
- "Practical"
- "Reliable"

15%

Convenience, Simplification

- "Convenient"
- "Easy"
- "Personalized"
- "Simple"
- "Fast"
- "Pleasant"

13%

Interest, Curiosity

- "Interesting"
- "Fantastic"
- "Intriguing"
- "Extraordinary"
- "Super"
- "Fascinating"

Negative associations with AI

17%

Fear, Risk

- "Disturbing"
- "Alienating"
- "Dangerous"
- "Risky"
- "Hallucinatory"
- "Impersonal"
- "Worrisome"

11%

Skepticism, Uncertainty

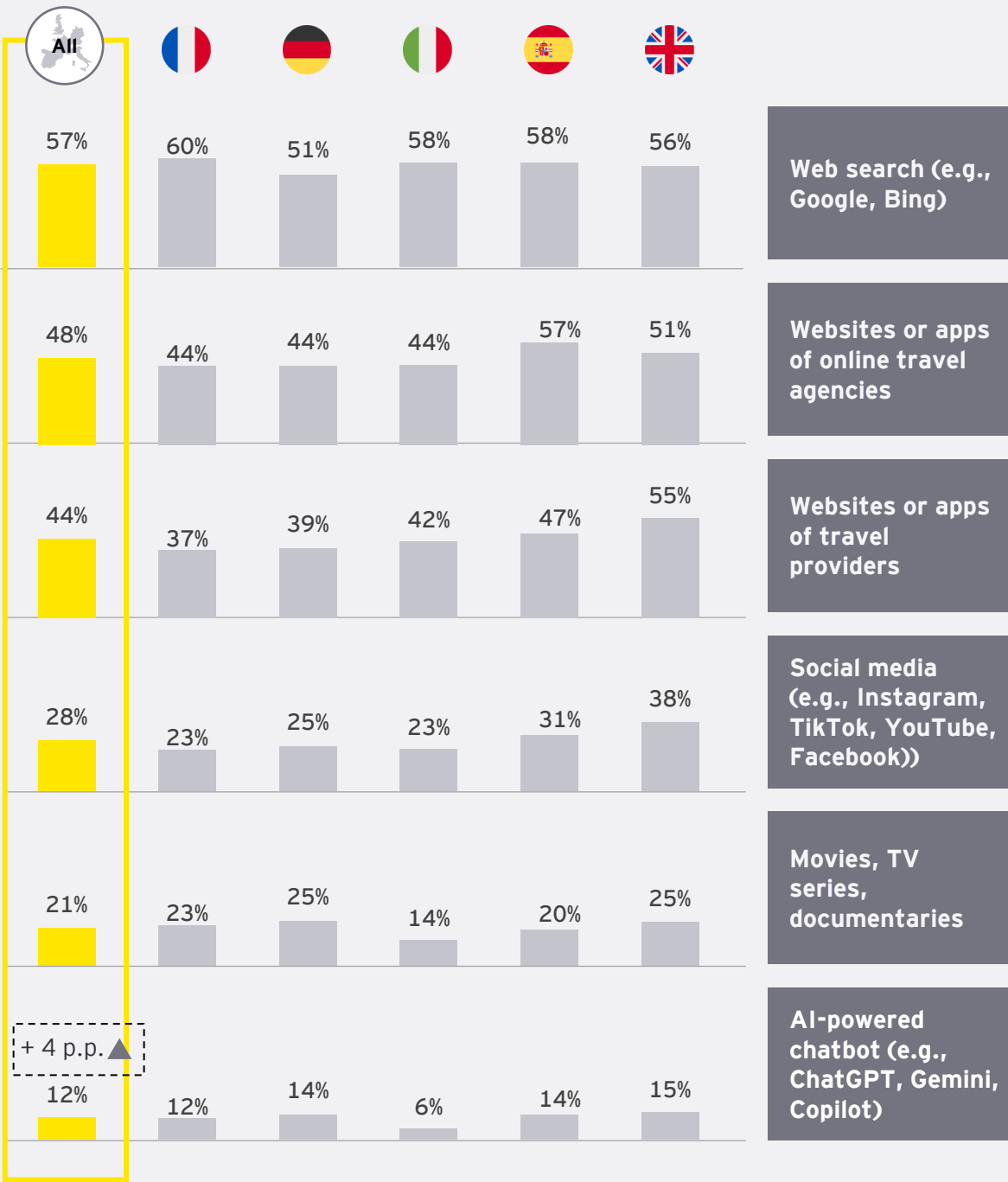
- "Useless"
- "Strange"
- "Absurd"
- "Complicated"
- "Boring"

Note: The classification of responses was carried out with the help of Generative AI tools. Approximately 16% of the sample was excluded, as they preferred not to express an opinion.

4

Which digital tools did you used or were inspired by to plan your trips in 2024?

To plan or find inspiration for their trips, most people continue to use web search engines. Other widely used digital tools include websites or apps of online agencies and travel providers. The percentage of those who have used AI tools is growing (12% of the sample surveyed), especially among young people (Gen Z 21%). Additionally, for Gen Z, social media is a major source of inspiration for travel decisions (48% vs 28%).

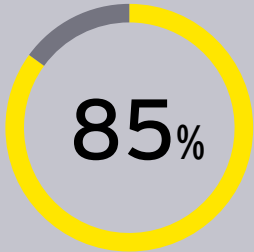


Main changes compared to the 2024 edition of the Observatory

4

The impact of digital mobility services on daily commuting

The sample was asked to indicate if and how often they use their smartphone to get information about their route for short daily commutes (less than 100 km). 4 out of 5 people use it. 1 out of 3 does so regularly.



Uses the smartphone occasionally or regularly to get information about the route.

Only 15% never use it

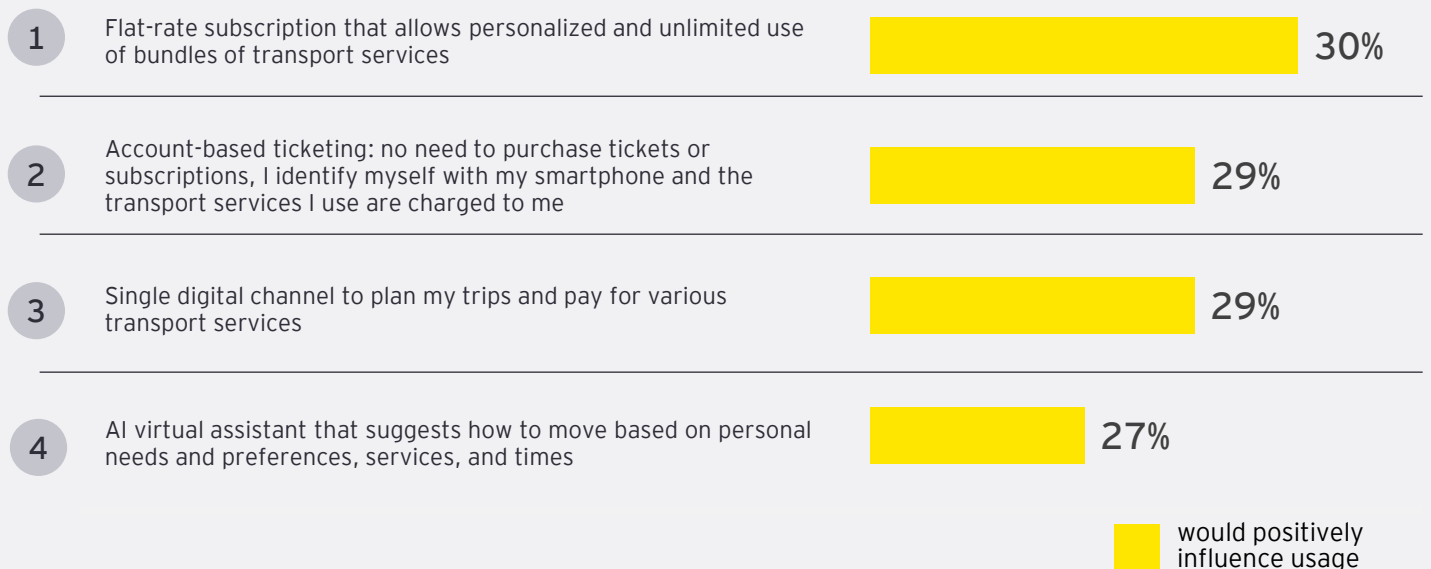


Influence of digital mobility services on habits



We investigated the influence that the availability of mobility services would have on the propensity to use public transport and micromobility. The effect on sustainable mobility choices would be tangible. MaaS services that allow the use of a bundle of transport services in a personalized and unlimited manner through a flat-rate subscription are the most attractive.

For your short daily commutes, how would the indicated solutions affect your propensity to use public transport and micromobility?

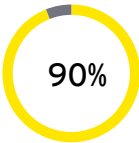




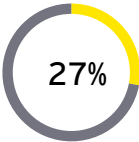
We analyzed the distinctive aspects of behaviors, preferences, and factors that influence the choices of Generation Z. The comparison with other generations can provide valuable insights into future travel trends.

Leisure/business trips

● Gen Z ● All

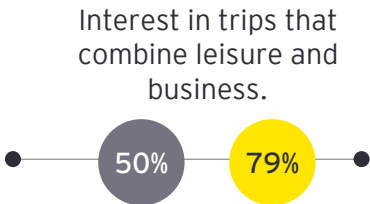


Has taken at least one leisure trip in 2024



The number of leisure trips will increase in 2025

Increasingly blurred boundaries between leisure and business trips: Gen Z is much more interested than other generations in combining the two purposes



Overtourism

From the responses of Gen Z to the question of how overtourism will affect their future travel choices, a preference for slow tourism experiences and destinations that implement an access fee emerges, compared to the average



I will limit travel during peak periods and plan trips during the off-season



I will opt for slow tourism experiences, immersing myself in the local culture



I will choose less known/less crowded destinations

Slow tourism experiences, immersing myself in the local culture

Destinations that implement an access fee



The new generation of travelers

5

Understanding Gen Z is the key to the future of travel

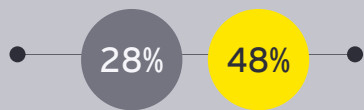
From the responses of Gen Z interviewees, some emerging trends can be identified regarding the tools used in the inspiration and planning phases of travel.

Digital tools for planning the trip or getting information about the route

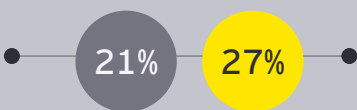
● Gen Z ● All

From the responses of Gen Z to the question about the digital tools they used or that inspired them to plan their trips, the growing role of social media and multimedia content emerges

Social Media (es. Instagram, TikTok, YouTube, Facebook)



Movies, TV series, documentaries



For short trips, they use their smartphones more than average to get information about the route

Using smartphones for route information

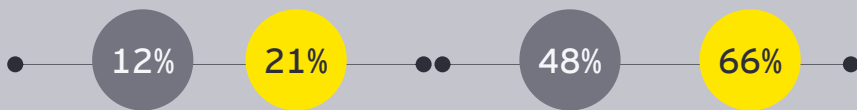


Use of Artificial Intelligence (AI)

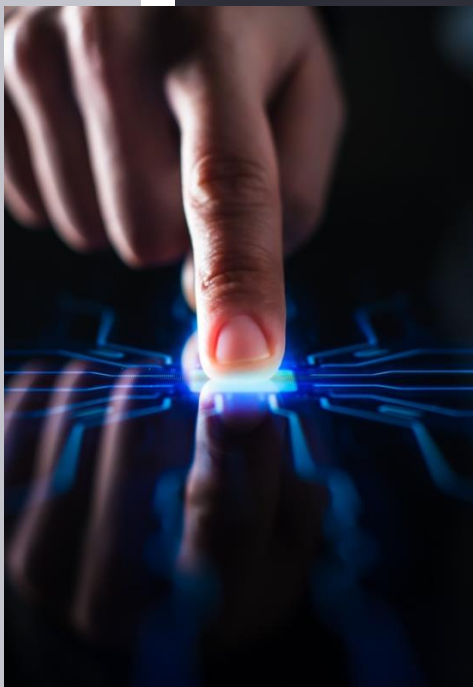
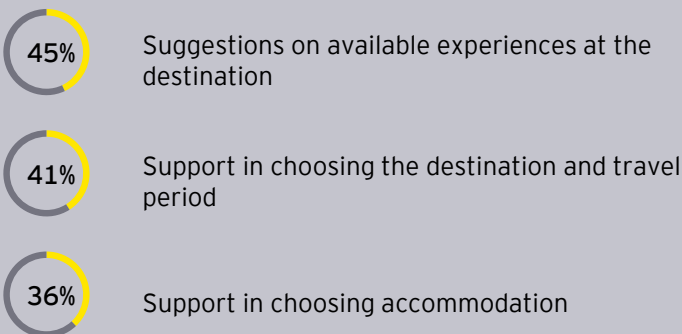
● Gen Z ● All

They have already used an AI-based chatbot (like ChatGPT) at least once to plan a trip

Interested in using an AI-powered virtual assistant to plan a trip in the future



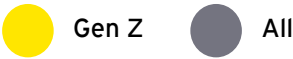
Gen Z who would use AI for:



5

Understanding Gen Z is the key to the future of travel

From the responses of Gen Z interviewees, some emerging trends in the travel sector can be identified.



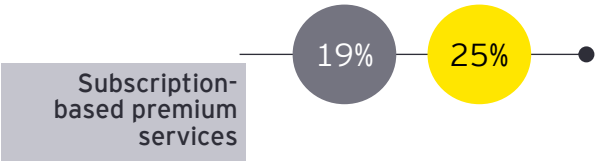
Free Services and Accessories

Among the main free services that influence the choice of transportation, One-click Buying is indicated by 40% of Gen Z interviewees



Tendency to compare the booking and purchasing experience offered by mobility operators with that of the best digital retailers

They are more likely than average to seek access to premium services by paying a subscription fee



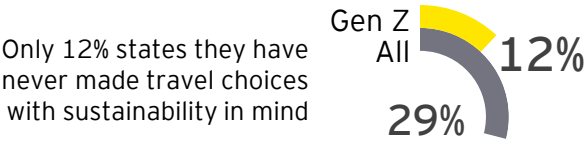
Use of subscription-based commercial models, like Netflix or Spotify

Among the main paid additional services favored by Gen Z, travel insurance services stand out



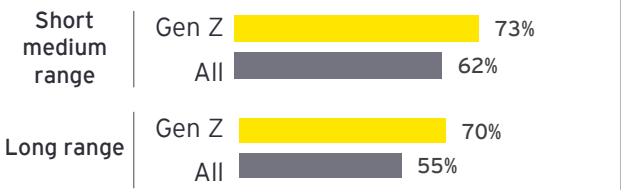
Interest in insurance services that offer maximum flexibility in case of changes in plans

Intentions for sustainable travel

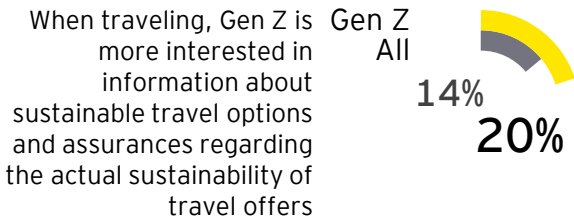


Sensitivity towards sustainable travel is confirmed

They are more willing to pay a surcharge to offset carbon emissions



Interest in sustainability-oriented commercial offers



Need for better information on sustainable travel options



To identify traveler profiles, we segmented the sample into 8 homogeneous clusters based on demographic, behavioral, and psychological characteristics.



17%

Eco-conscious seniors

Gen X and Baby Boomers particularly sensitive to environmental impact, with a tendency to plan off-season trips and to practice slow tourism.



17%

Techno travelers

Gen Z and Millennials who are comfortable using digital tools for travel and are very interested in AI.



14%

Tech-Suspicious seniors

Baby Boomers and Gen X who are reluctant to use virtual assistants and other digital tools when traveling.



13%

Inflation concerned

Their travel choices are influenced by concerns that inflation will limit their purchasing power.



12%

AI dislikers

They are predominantly Millennials who do not trust AI and digital mobility services.



9%

Reluctant travelers

They do not particularly enjoy the current travel experience and therefore limit their travels.



9%

Serial vacationers

They are looking forward to their next vacation to have fun and spend time with family and friends.



9%

Hypertravelers

They travel to live and live to travel, proudly doing so in a sustainable way.

Note: to determine the clusters, k-means clustering was used on 12 dimensions. The data was pre-normalized by scaling to unit variance

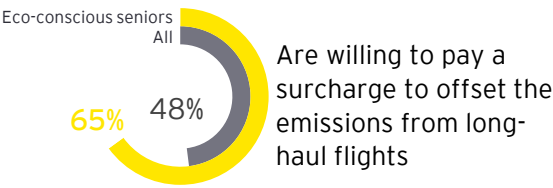
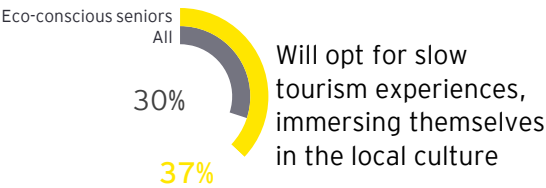
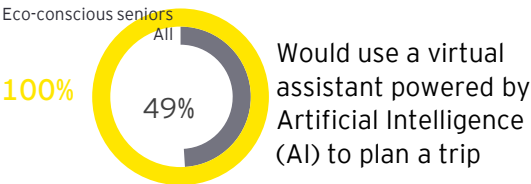
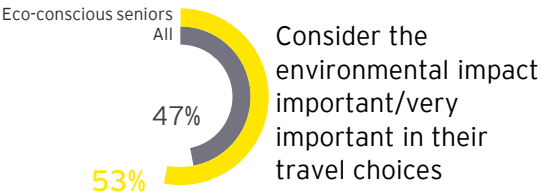
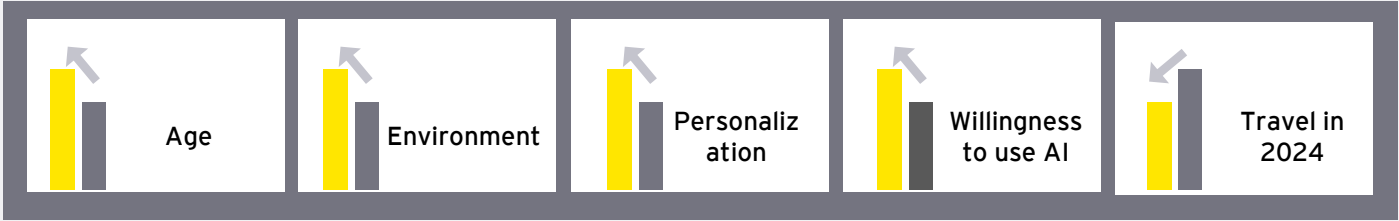
Traveler profiles

6

Eco-conscious seniors

Cluster
Entire sample

Eco-conscious Seniors are Gen X and Baby Boomers who are particularly sensitive to environmental impact. They believe more than anyone else that the transportation and travel sector should offer more information and eco-friendly options. They tend to plan off-season trips, choose less-known destinations, and prefer slow tourism experiences.



In their travel choices, they are most sensitive to:



The possibility to hold a reservation for free for a limited time (e.g., ticket price hold)

Travel-related insurance services

Digital guide for navigating the station and airport (e.g., platform, commercial establishments, how to reach the final destination)

Automatic refunds and bonuses in case of delays or disruptions (e.g., recognition of loyalty program points)

In their travel choices, they are least sensitive to:



The possibility to purchase extra miles

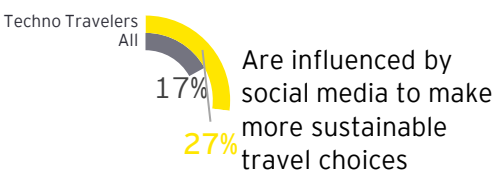
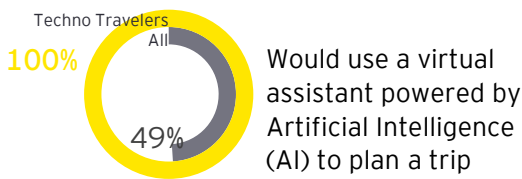
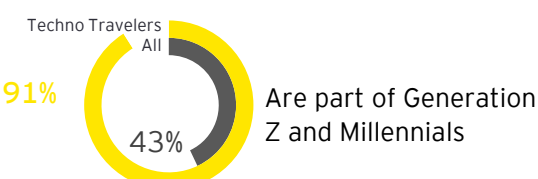
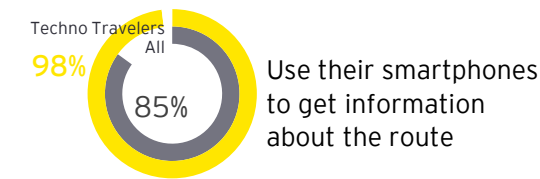
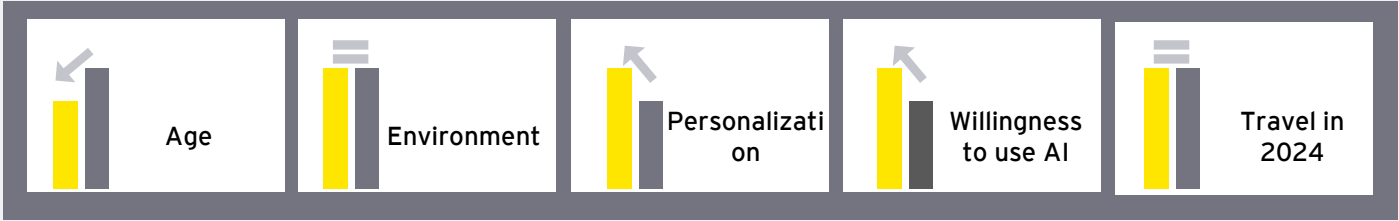
When traveling by plane, more payment options, including installment payments

6

Techno travelers

Cluster
Entire sample

Techno travelers are travelers who are comfortable with digital technologies for planning and managing their trips. They perceive AI as a useful tool for enhancing the travel experience and promoting convenience. They are predominantly Millennials and Generation Z, who have grown up with technology at their fingertips. They are particularly attentive to trends and shared experiences on social media.



In their travel choices, they are most sensitive to:



One-click buying

Digital guide for navigating the airport

Touchless travel experience

Internet connectivity on board

Digital assistance during planning and purchasing

When traveling by train, premium onboard connectivity that allows, for example, video calls during the journey, access to premium services through a recurring fee, luggage storage, and dining services

Facial recognition technologies

In their travel choices, they are least sensitive to:



Automatic refunds and bonuses in case of train delays

Free catering service

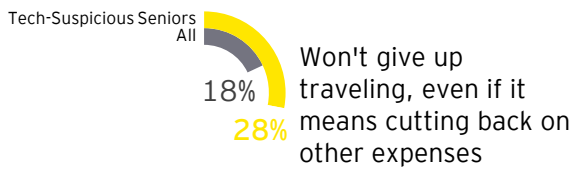
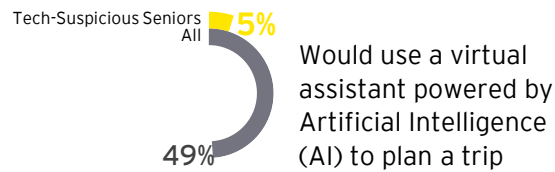
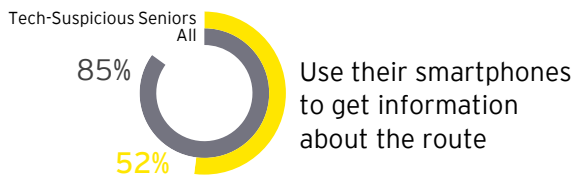
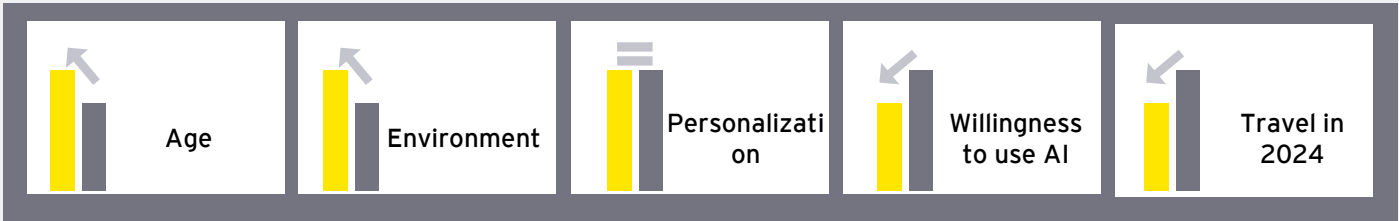
6

Tech-Suspicious Seniors

Cluster
Entire sample

Tech-Suspicious Seniors are Baby Boomers and Gen X who show disinterest and distrust towards digital technologies in relation to travel. Only 5% of them would rely on a virtual assistant powered by Artificial Intelligence to plan a trip.

They travel slightly less than average and predominantly have an annual income below €45,000. However, despite rising prices, they do not give up traveling. Instead, they are willing to cut back on other expenses.



In their travel choices, they are most sensitive to:



Automatic refunds and bonuses in case of delays or service disruptions (e.g., awarding loyalty program points)

Free catering service

In their travel choices, they are least sensitive to:



Touchless travel experience

Loyalty program

Digital assistance during the planning and purchasing phases for train and airplane travel

The possibility to hold a reservation for free for a limited time (e.g., locking in the ticket price)

Information on options for sustainable travel and guarantees for the actual sustainability of travel offers

Touchless travel experience (the ability to interact throughout the journey without any physical contact)

Facial recognition technologies to reduce queues and waiting times at train stations and airports

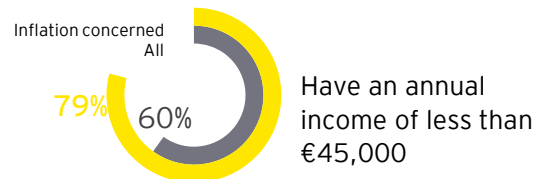
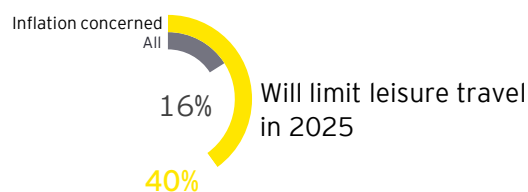
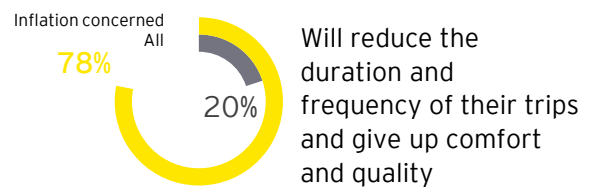
6

Inflation concerned

Cluster
Entire sample

Concerns about inflation affecting purchasing power strongly influence their travel choices. They have a relatively low annual income. Nearly 40% will reduce leisure travel in 2025 compared to 2024, particularly air travel.

About 3 out of 4 are ready to reduce the time/frequency of their trips and give up comfort/quality.



In their travel choices, they are most sensitive to:



More payment options, including installment payments

Automatic refunds and bonuses in case of delays or service disruptions

The possibility to hold a reservation for free for a limited time (e.g., locking in the ticket price)

Clear information on health safety (e.g., distancing and protection measures, sanitization procedures)

In their travel choices, they are least sensitive to:



Loyalty program

Onboard digital entertainment (access to newspapers, music, videos)

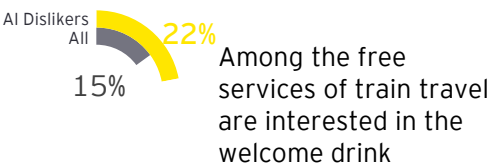
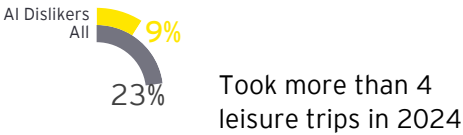
Digital assistance during the planning and purchasing phases for train and airplane travel

6

AI dislikers

AI Dislikers are Millennials and Gen Z who, despite being digital natives, are not attracted to AI-based technologies in relation to their travels. More than others, they appreciate manifestations of attention that involve human contact, such as a welcome drink when traveling by train.

Cluster
Entire sample



In their travel choices, they are most sensitive to:



Wide range of customization options for your trip with additional services tailored to your needs

Information on sustainable travel options when traveling on intercontinental flights

Transfer services available for purchase during booking (taxi and taxi pooling reservations, car rental, public transportation) when traveling by train or for domestic flights

Welcome drink on the train

In their travel choices, they are least sensitive to:



Digital entertainment on board when traveling on international flights

Facial recognition technology to reduce queues and waiting times at the airport for intercontinental flights

Timely information on delays and disruptions

Free catering service on international and intercontinental flights

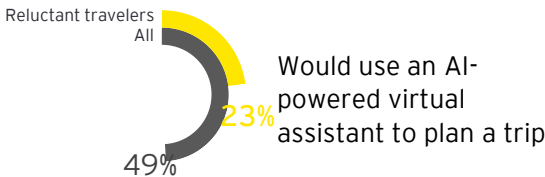
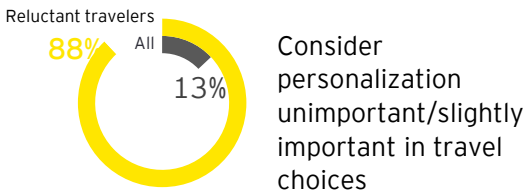
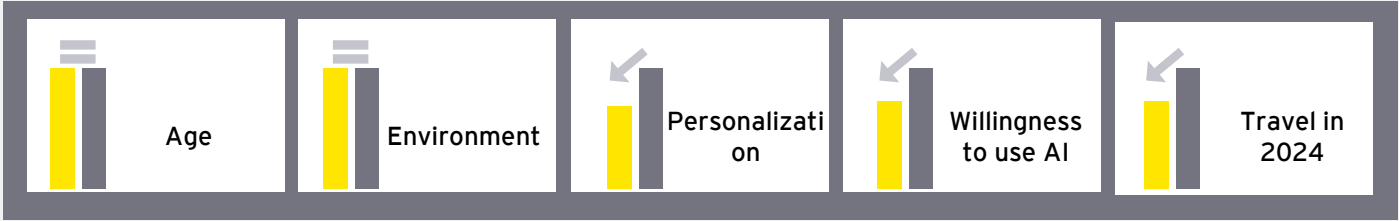
Automatic refunds and bonuses in case of delays or disruptions for intercontinental flights

6

Reluctant travelers

Cluster
Entire sample

Their income is not the lowest and is only slightly below average. Their concerns about inflation are average. Nevertheless, they travel less compared to other profiles. They have lower motivations than others to travel to explore new places, cultures, and foods, to be with family and friends, to have fun, or to relax. They are the least sensitive to environmental sustainability and the personalization of the experience.



In their travel choices, they are most sensitive to:

- More payment options, including installment payments
- Digital entertainment on board the train
- Timely information on delays and disruptions

In their travel choices, they are least sensitive to:

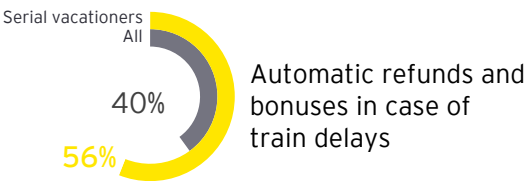
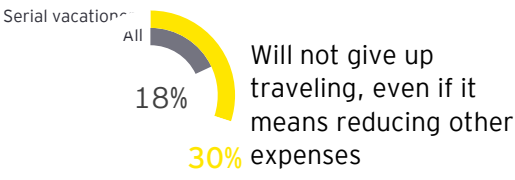
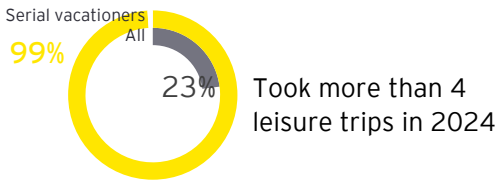
- | | |
|---|---|
| Loyalty program | Insurance services |
| Digital assistant for planning and purchasing | Information on sustainable travel options |
| Touchless travel experience | Wide range of customization options for your trip with additional services tailored to your needs |

6

Serial vacationers

Cluster
Entire sample

They take more leisure trips compared to other profiles: about 1 in 3 plans more than 10 leisure trips in 2025, and 1 in 7 will increase their leisure trips in 2025 compared to 2024. 4 out of 5 will travel to explore new places, cultures, and try local food. Their income is average, however, 30% will not give up traveling, even if it means reducing other expenses, in case of a decrease in purchasing power.



In their travel choices, they are most sensitive to:



Timely information on delays and disruptions, flexibility in changing leisure travel plans

For air travel, the possibility to hold a reservation for free for a limited time (e.g., price lock for 48 hours)

Wi-Fi service with Internet access and power supply for portable devices

Loyalty program

Automatic refunds and bonuses in case of train or airplane delays

Free catering service

In their travel choices, they are least sensitive to:



Touchless travel experience

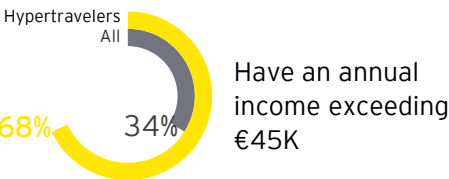
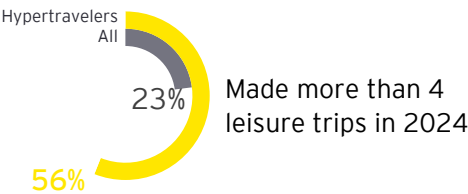
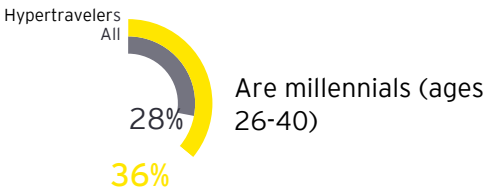
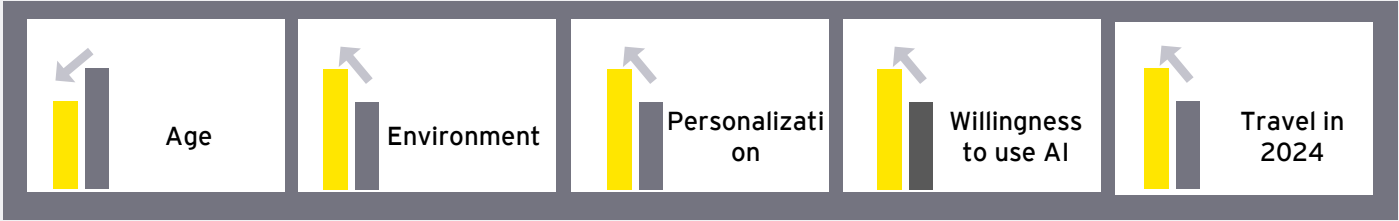
Digital guide for navigating the airport

6

Hypertravelers

Cluster
Entire sample

High-value customers in the travel sector, with an annual income above average. 1 in 2 takes more than 10 business trips per year, while about 60% plan more than 5 leisure trips in 2024. 40% will increase leisure trips in 2024 and 38% will increase business trips by train. More than all they are influenced by sustainability in their travel choices and express curiosity and interest in AI supporting the travel experience. Their attitude towards environmental issues is particularly influenced by awareness campaigns. In 2025, 34% will travel for sports and wellness, and 29% will combine leisure and business. In the future, 52% plan to take bleisure trips.



In their travel choices, they are most sensitive to:



Wide range of options to customize the trip with additional services based on individual needs

Transfer services available for purchase during booking (taxi and taxi pooling reservations, car rentals, public transportation)

Facial recognition technologies to reduce queues and waiting times

Dining service in the bar or restaurant carriage

Reservation of parking spaces for cars, bikes, and scooters

Loyalty program

Booking more comfortable seats within the same travel class

Access to premium services through the payment of a recurring fee

In their travel choices, they are least sensitive to:



More payment options, including installment payments

Digital guide for navigating the station



This section provides specific insights into each of the five countries surveyed, organized according to the three areas of analysis represented below. It also compares the country data with that of the overall sample, highlighting noteworthy deviations.

Travel habits and
main destinations

Drivers and
influences in
travel choices

Rail and plane
travel
preferences

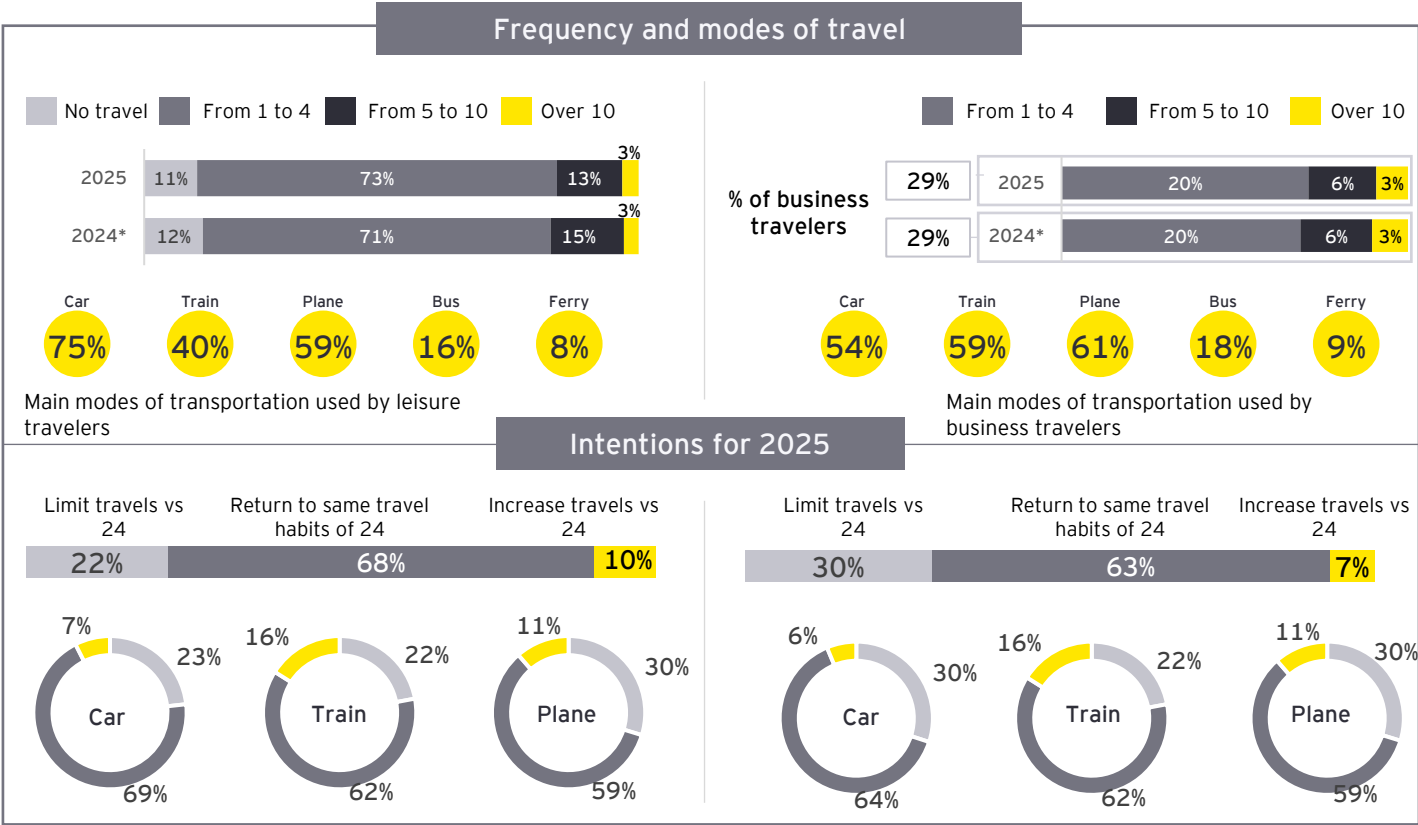


Travel attitudes by country

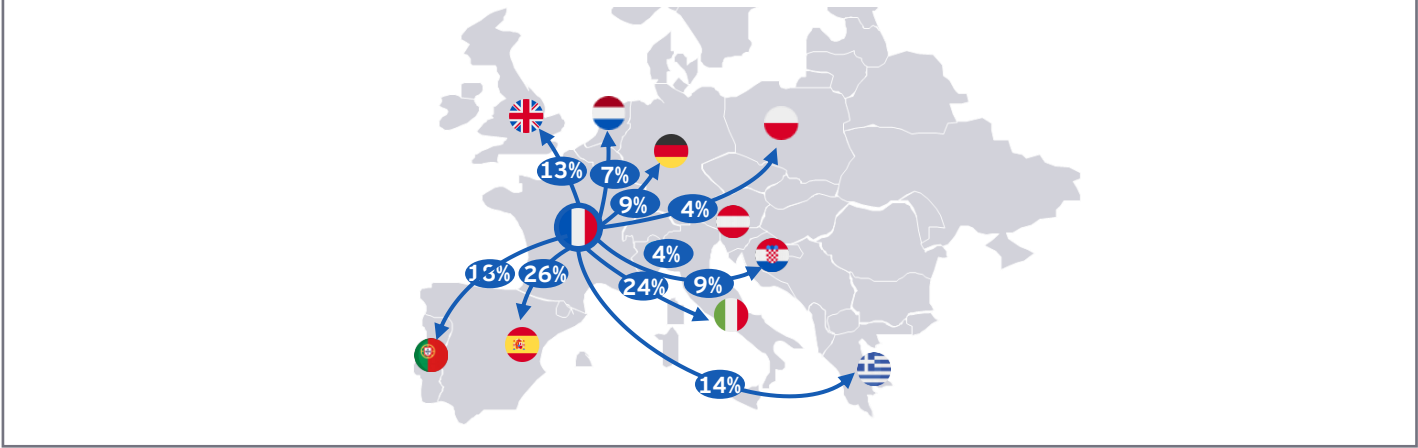
7 Focus France:

travel habits and major destinations

In 2025, the percentage of French travelers intending to travel for work remained the same as last year. They use the bus less than other countries. Their favorite destinations abroad are Spain and Italy.



European destinations in the intentions of French travelers in 2025 for their vacations

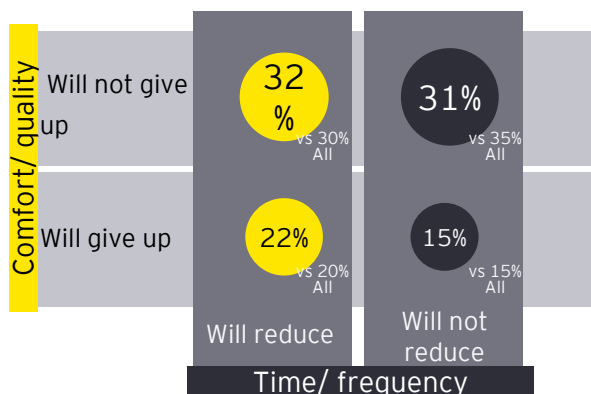


7 Focus France:

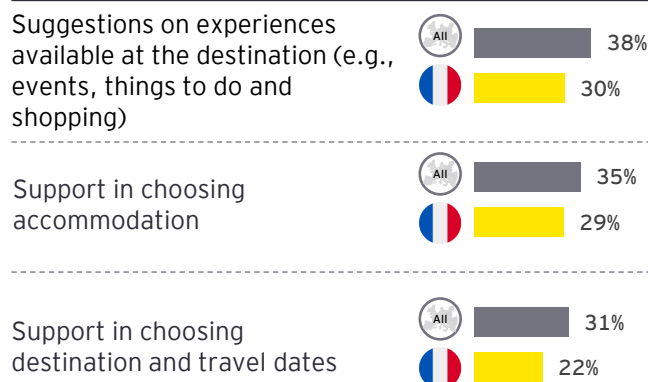
influences in travel choices

French travelers explicitly attach higher than average importance to the environmental impact of the mode of transport. Furthermore, despite the influence of overtourism on travel choices, French travelers show a lower propensity to restrict travel during busy periods than average.

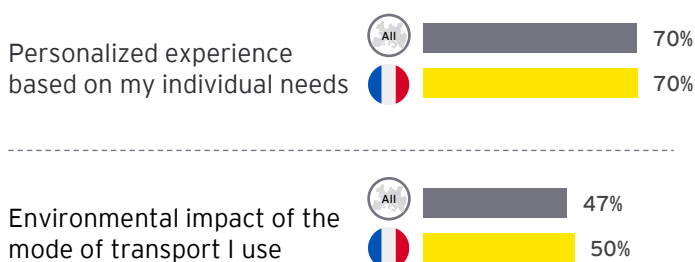
Impact of price inflation on consumer travel habits



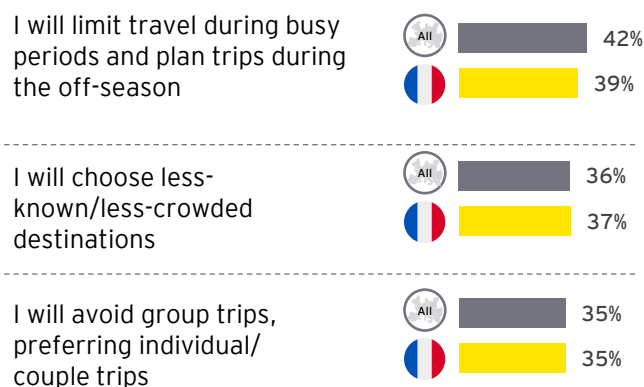
AI: main purposes of use



Importance attached to drivers of transportation choice



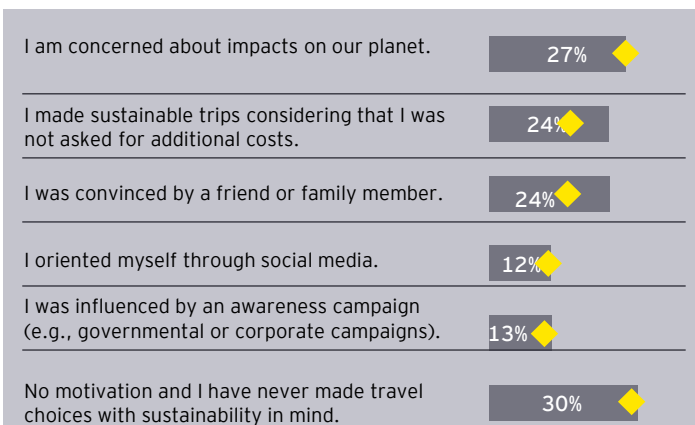
Overtourism: how will influence future travel choices



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



Implicit attitudes

Concern for environmental issues

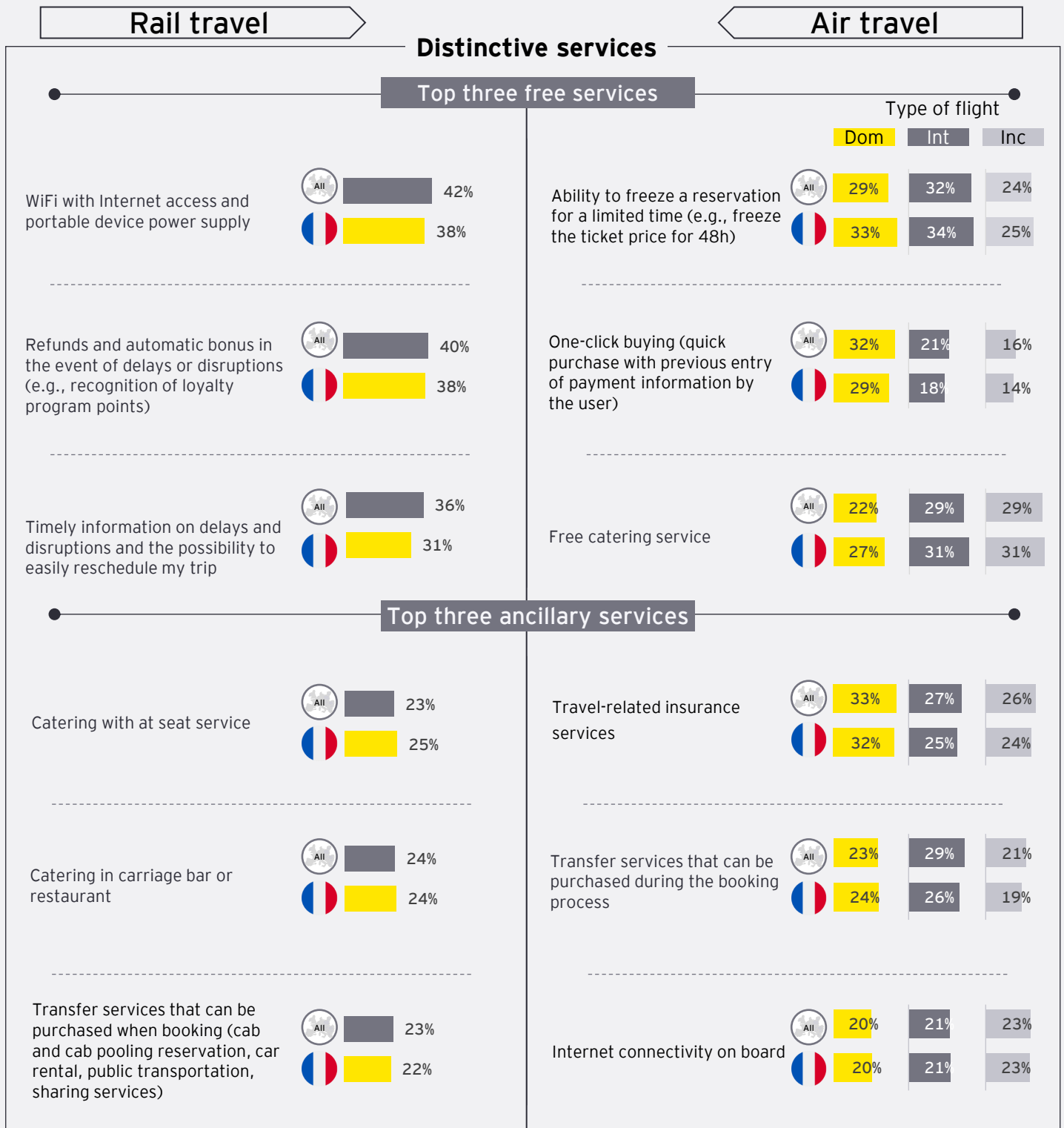


7

Focus France: distinctive services required for rail and air travel

The preferred free train services for French travelers are related to Wifi access and delay and disruption management.

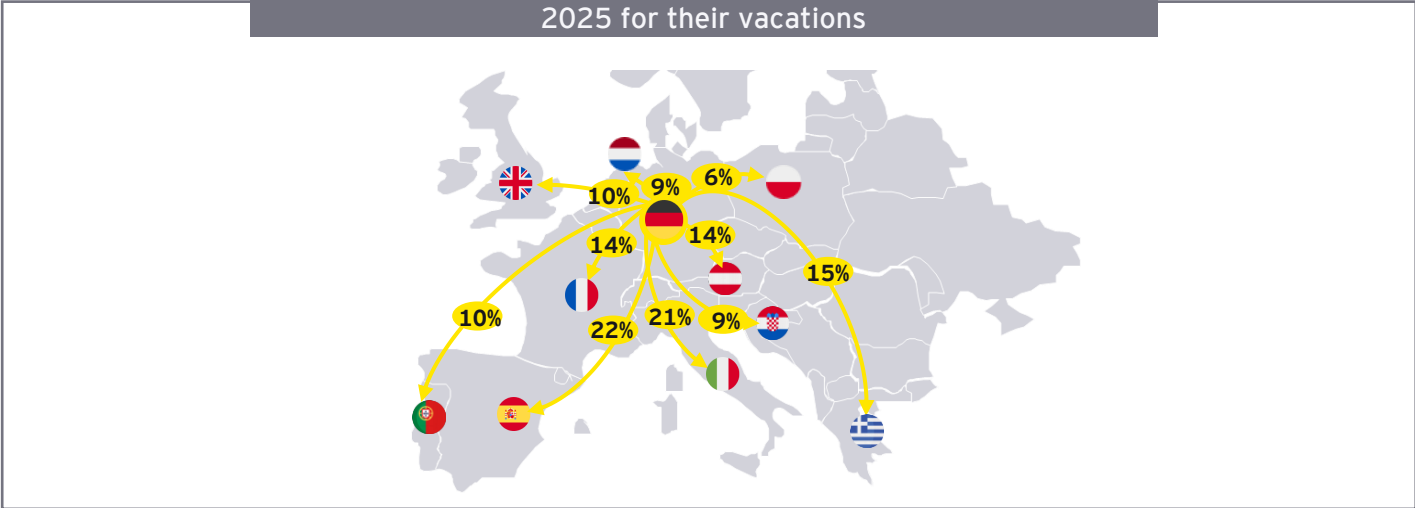
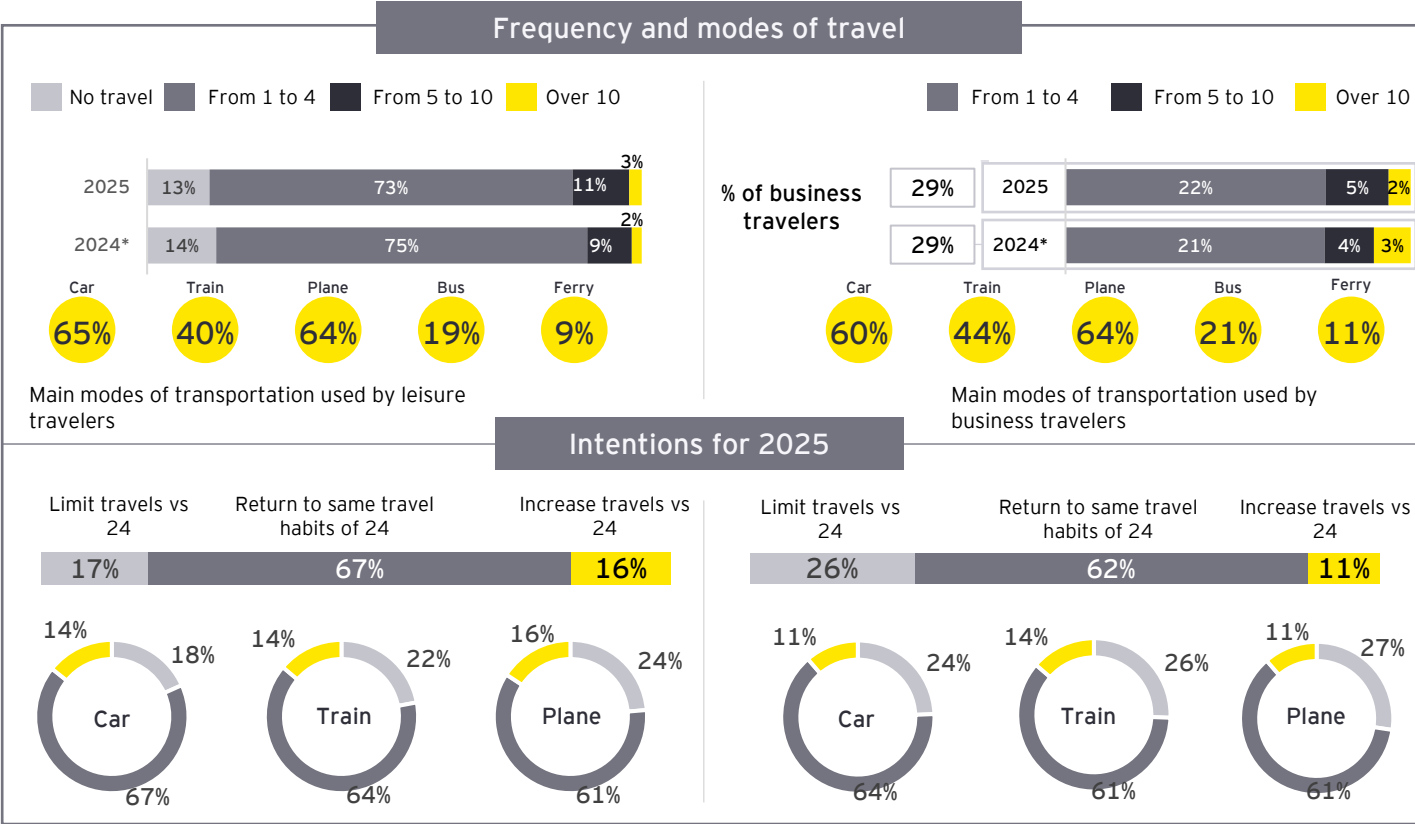
Catering (for train travel) and travel insurance (for air travel) are the main ancillary services.



7 Focus Germany:

travel habits and major destinations

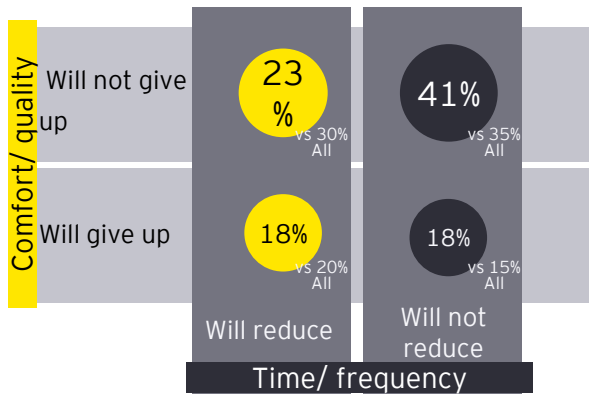
The frequency of leisure travel, for Germans, is expected to increase slightly. In contrast, the percentage intending to travel for business has remained unchanged. The train is used less than in other countries. Their favorite destinations abroad are Spain and Italy.



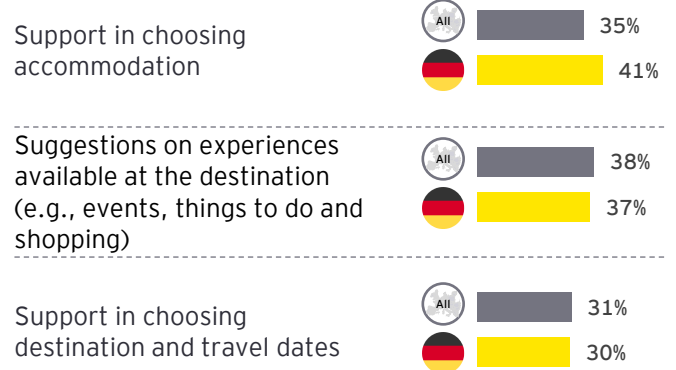
7 Focus Germany: influences in travel choices

Interest in using AI to choose lodging exceeds the average, while they place less importance on personalized experience and environmental impact, despite a greater implicit bias toward sustainability. They are also more influenced than average by overtourism, leading them to limit travel during busy periods and opt for lesser-known destinations.

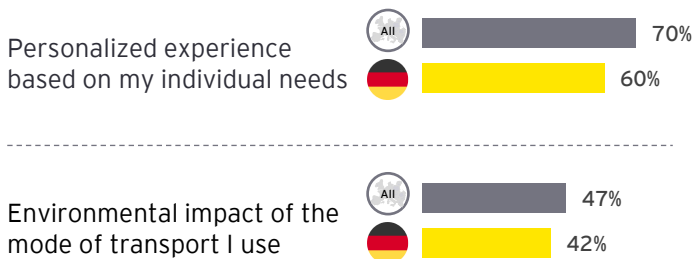
Impact of price inflation on consumer travel habits



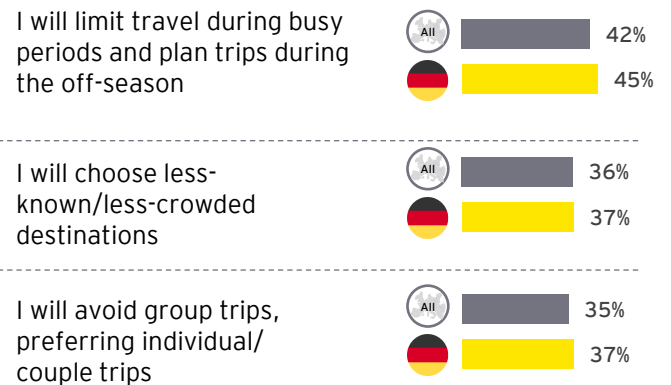
AI: main purposes of use



Importance attached to drivers of transportation choice

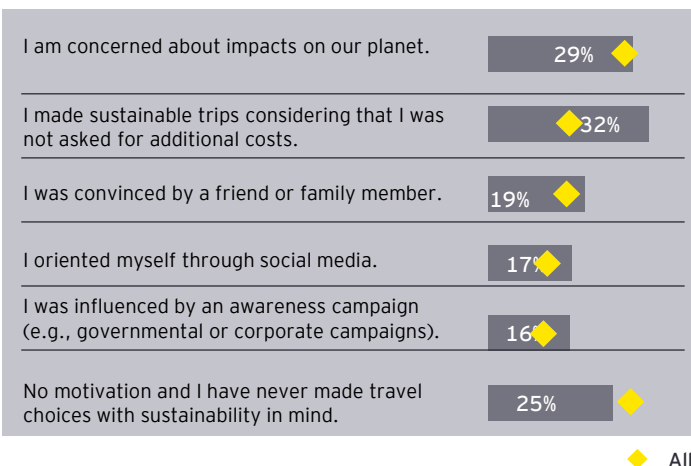


Overtourism: how will influence future travel choices



Attitude toward sustainable travel

Explicit intentions Reasons behind sustainable travel choices



Implicit attitudes Concern for environmental issues

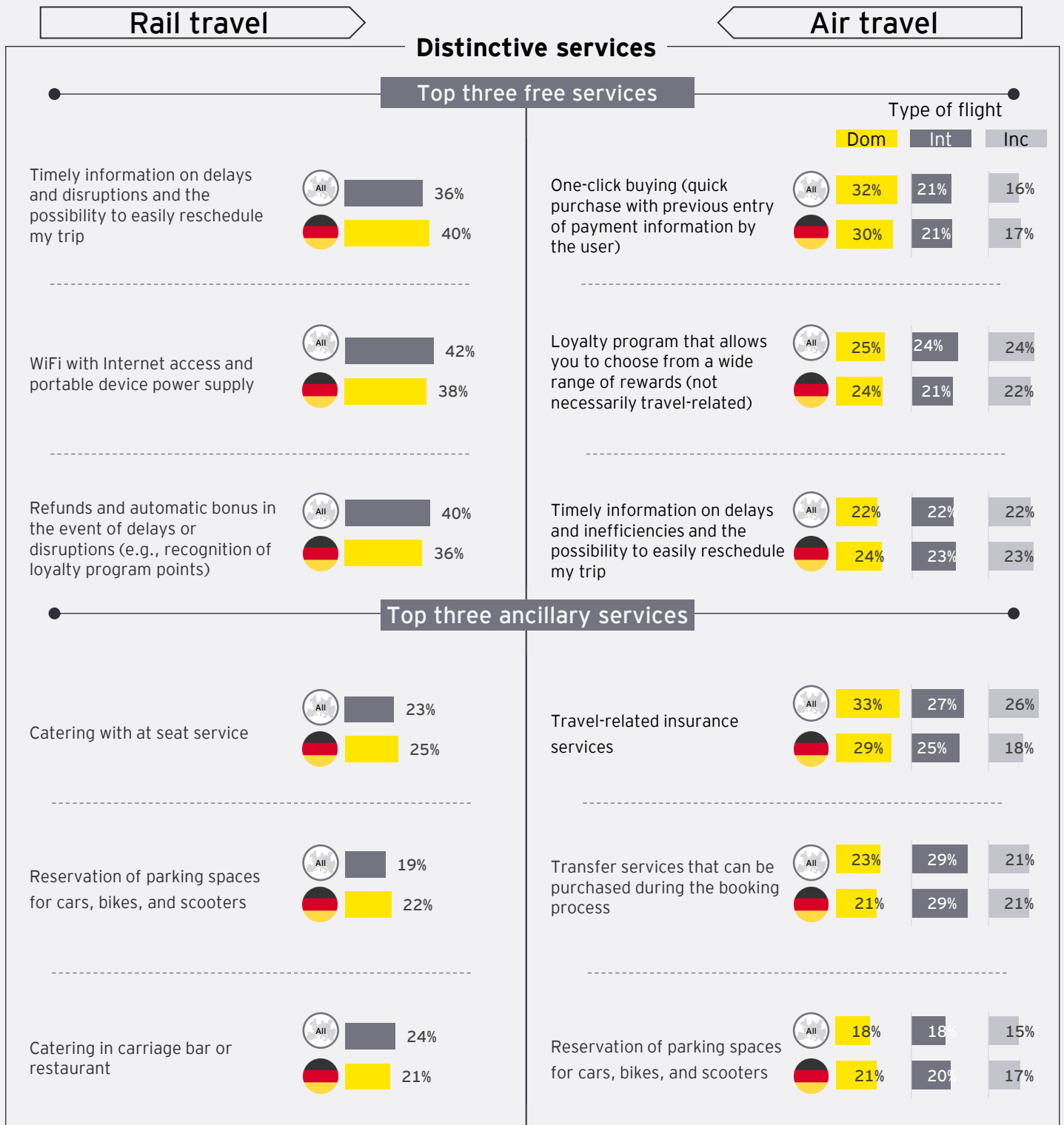


7

Focus Germany: distinctive services required for rail and air travel

The free services preferred by German travelers are related to delay and disruption management for train travel and quick airfare purchase.

Paid services that facilitate the door-to-door experience are among the most attractive for both train and air travel.



7

Focus Italy: travel habits and major destinations

In line with the general trend, Italian travelers plan to travel for leisure in 2025 with the same frequency as in 2024 and slightly reduce business travel. Cars and trains are particularly popular modes of transportation. Favorite destinations abroad are Spain, France and Greece.



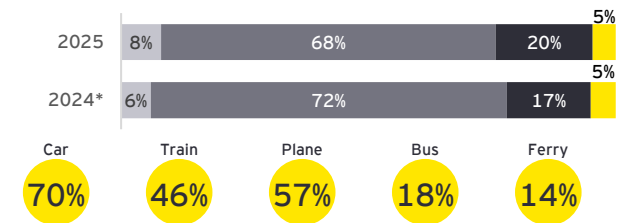
Leisure travel



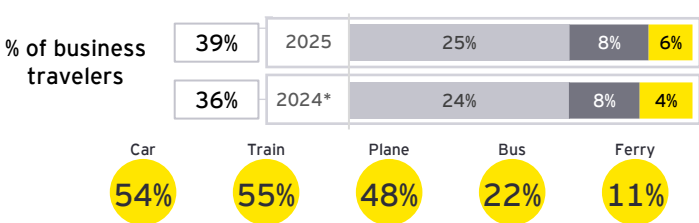
Business Travel

Frequency and modes of travel

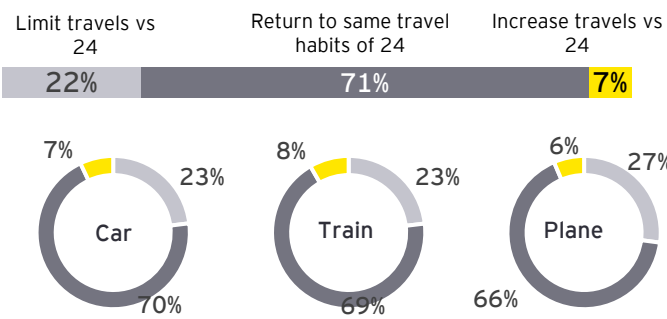
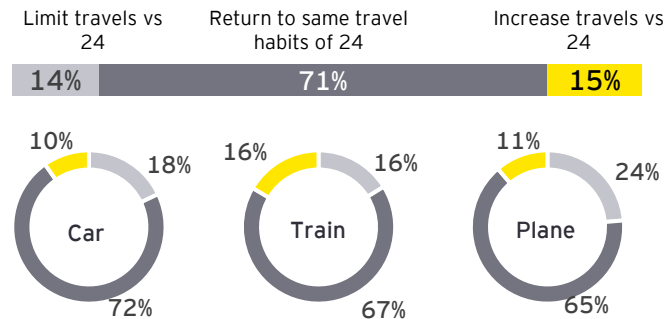
Legend: No travel (light grey), From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



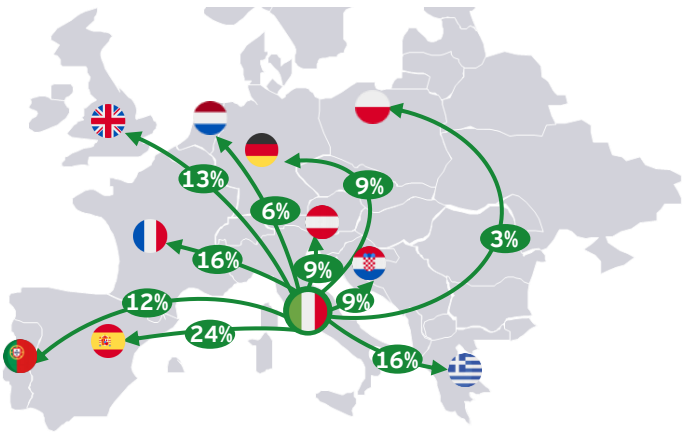
Legend: From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



Intentions for 2025



European destinations in the intentions of Italian travelers in 2025 for their vacations

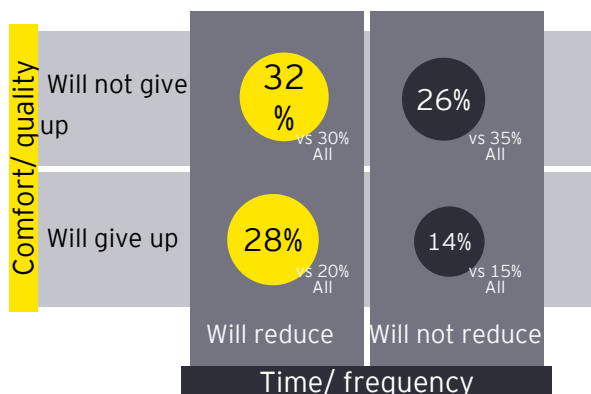


7 Focus Italy:

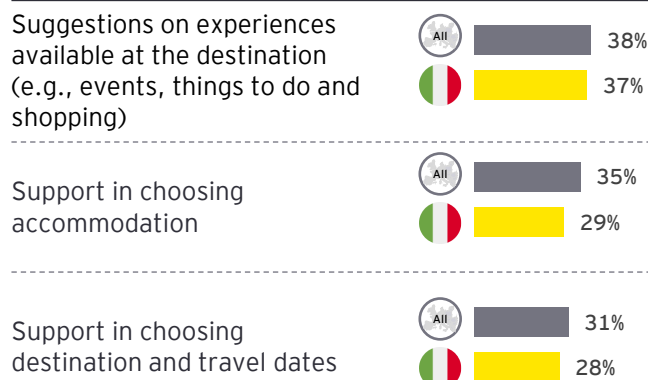
influences in travel choices

The explicit intentions of Italian travelers are generally in line with the average, with a strong interest in personalized travel experiences. However, they are particularly influenced by overtourism, which leads them to limit their travel during busy periods and choose lesser-known destinations to a greater extent than average.

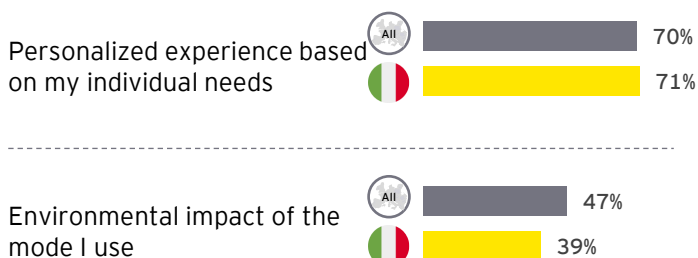
Impact of price inflation on consumer travel habits



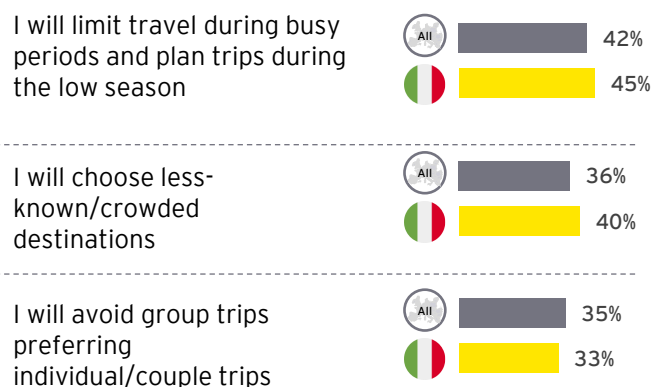
AI: main purposes of use



Importance given to factors of choice



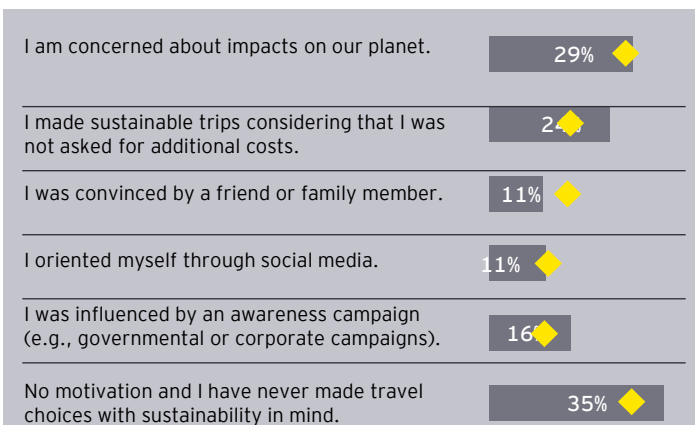
Overtourism: how will influence future travel choices



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



Implicit attitudes

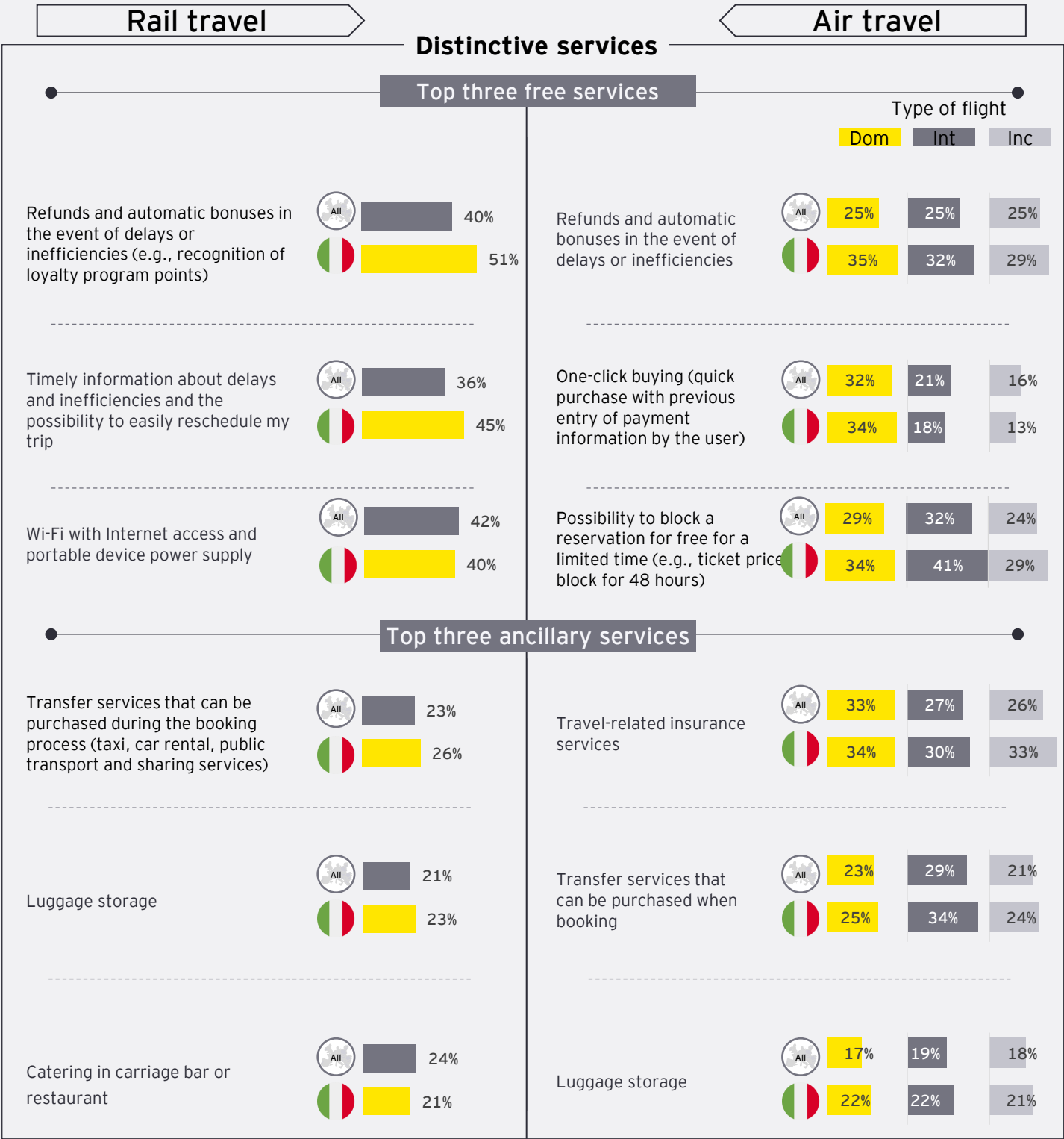
Concern for environmental issues



7

Focus Italy: distinctive services required for rail and air travel

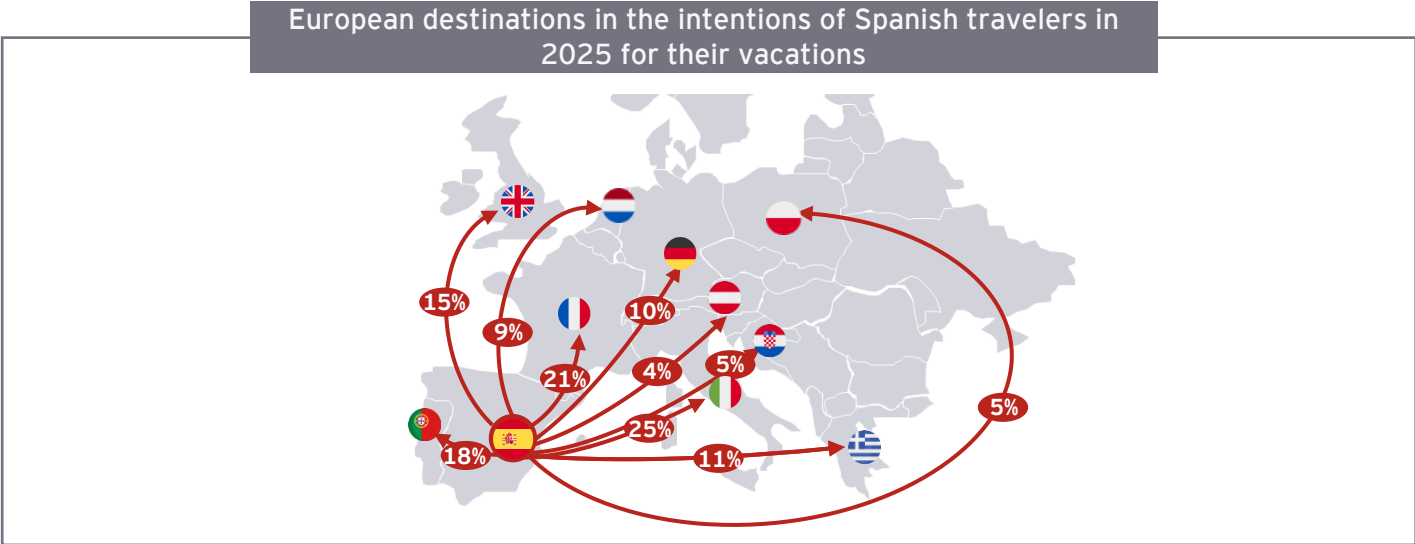
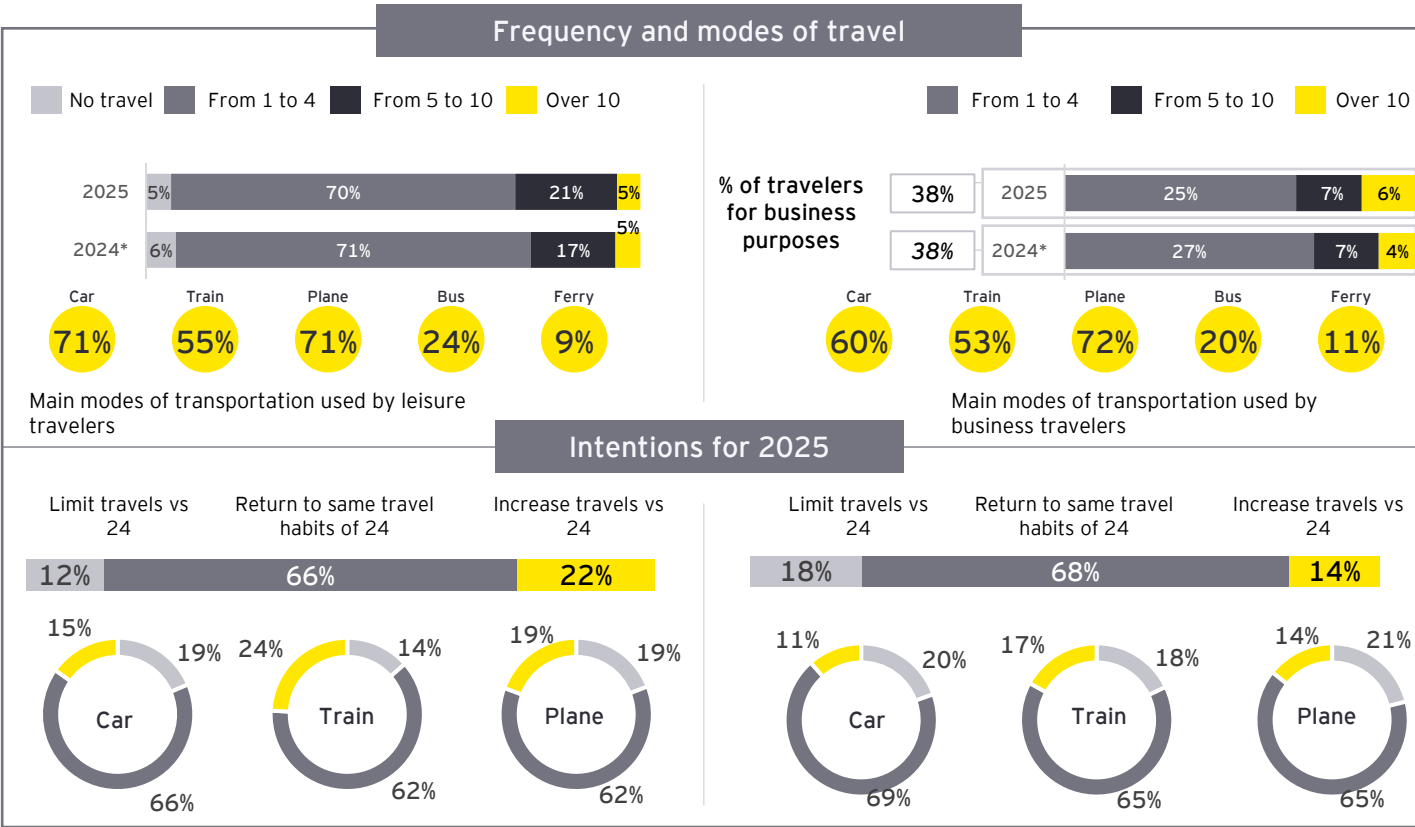
In line with the general trend, the free services preferred by Italian travelers are related to delay and disruption management, both for train and air travel. Transfer services (for train travel) and travel insurance (for air travel) are the main ancillary services.



7 Focus Spain:

travel habits and main destinations

Spanish travelers plan to keep the frequency of their business trips stable and increase leisure trips. Cars and planes are particularly popular modes of transportation. The preferred destinations abroad are Italy, France and Portugal.

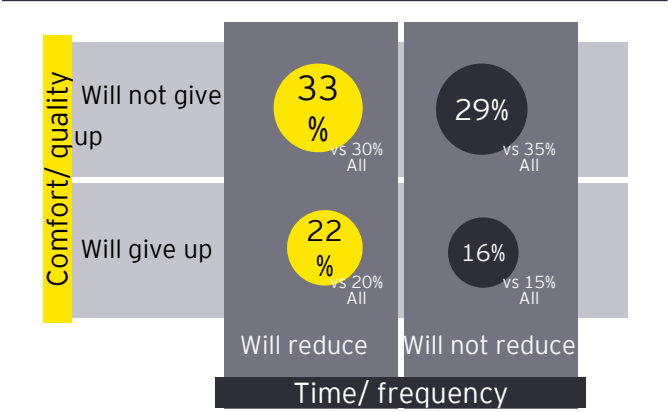


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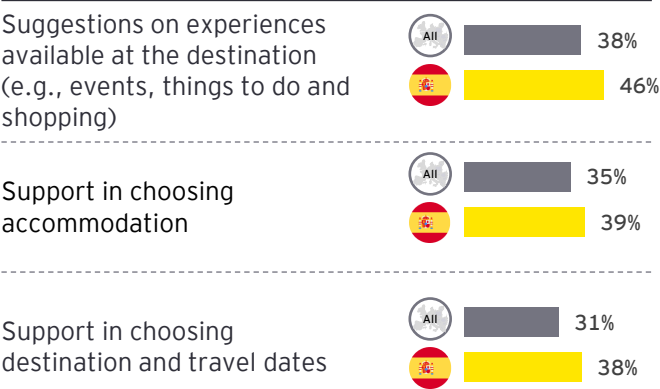
Focus Spain: influences in travel choices

The interest in using AI, particularly to obtain suggestions on the experiences available at the destination, exceeds the average. Spanish travelers show a strong interest in personalized travel experiences and consider important the environmental impact of the journey. They will be particularly influenced by overtourism in their future travel choices.

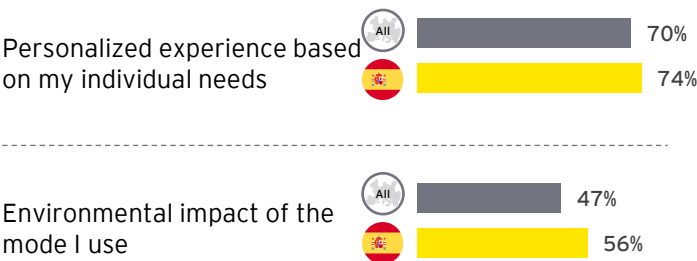
Impact of price inflation on consumer travel habits



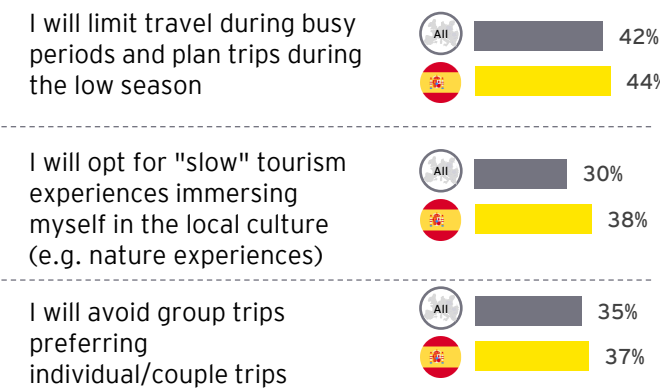
AI: main purposes of use



Importance given to factors of choice



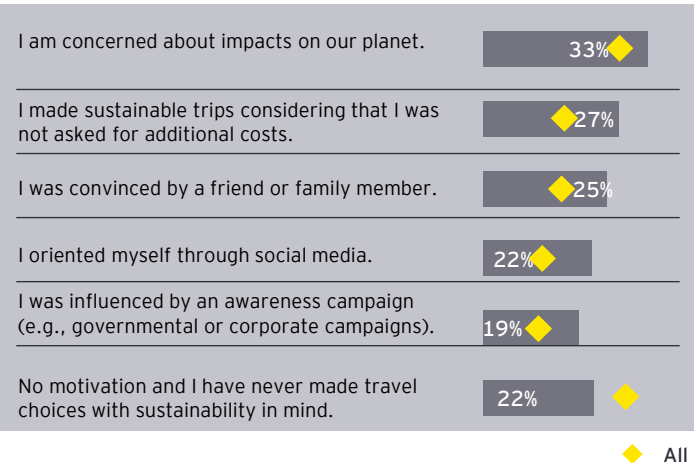
Overtourism: how will influence future travel choices



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



Implicit attitudes

Concern for environmental issues

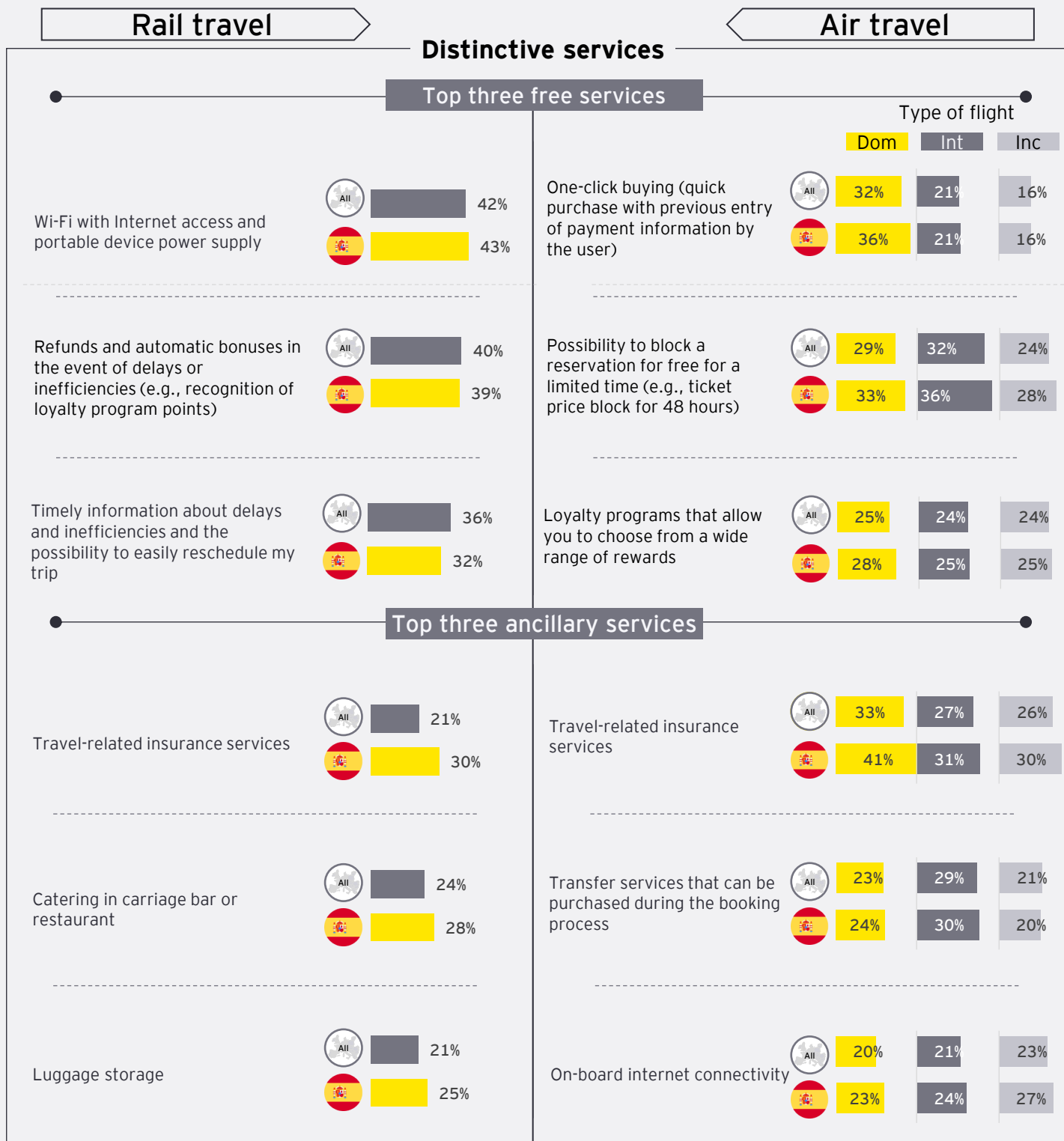


7

Focus Spain:

distinctive services required for rail and air travel

The free services preferred by Spanish travelers are WiFi on the train and quick purchase for air travel. Insurance services and catering are, among those with a fee, the most attractive.



7

Focus UK: travel habits and main destinations

UK travelers expect to slightly increase the frequency of their business travel in 2025. Air travel is particularly popular as a mode of transportation for both leisure and business trips. The preferred destinations abroad are Spain, France and Italy.



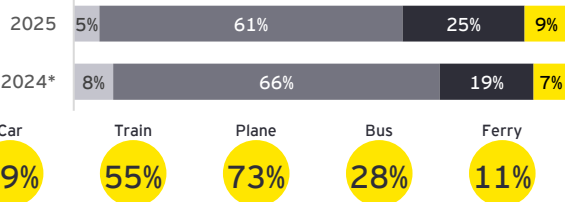
Leisure travel



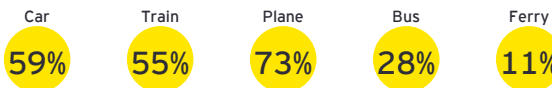
Business travel

Frequency and modes of travel

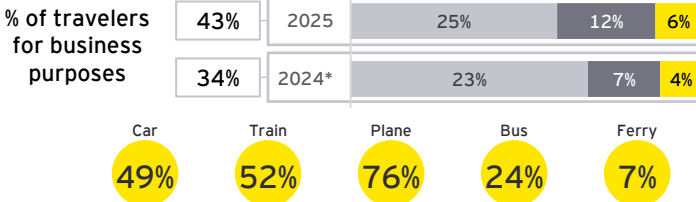
Legend: No travel (light grey), From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



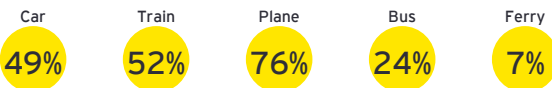
Main modes of transportation used by leisure travelers



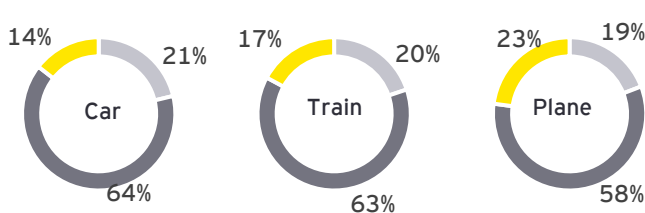
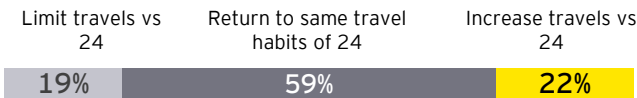
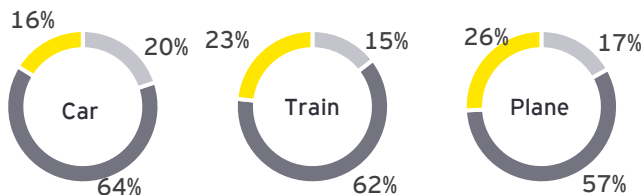
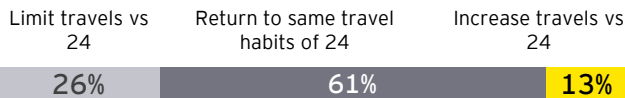
Legend: From 1 to 4 (dark grey), From 5 to 10 (black), Over 10 (yellow)



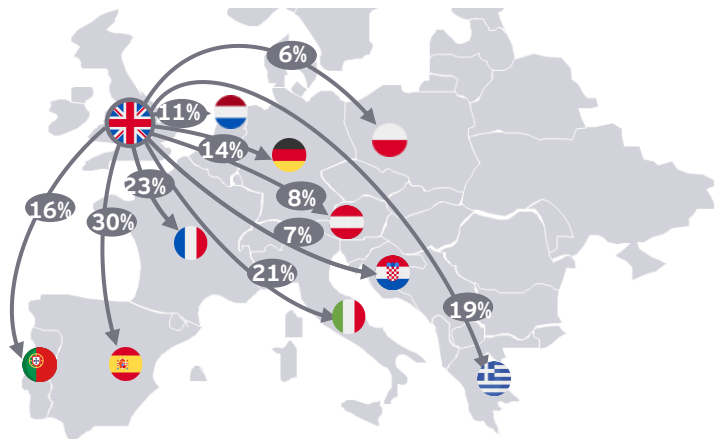
Main modes of transportation used by business travelers



Intentions for 2025



European destinations in the intentions of UK travelers in 2025 for their vacations

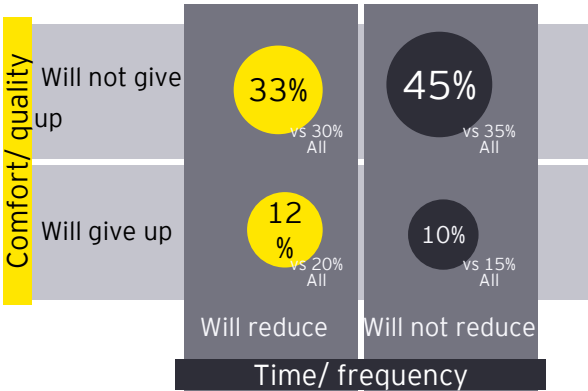


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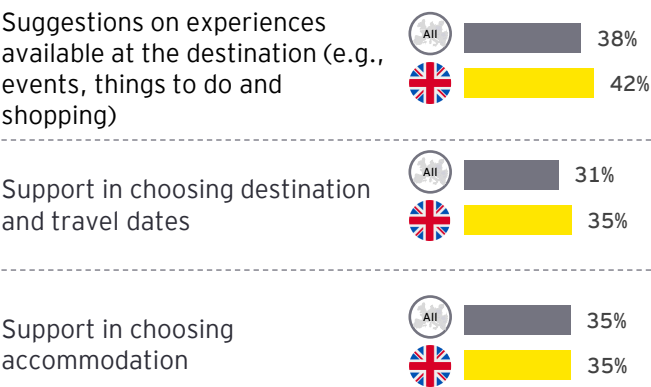
Focus UK: influences in travel choices

A significant portion of UK travelers do not expect inflation to impact their purchasing power. They are more sensitive to the personalization of their travel experience and the environmental impact of their mode of transport. In contrast, they are less affected by overtourism than the average.

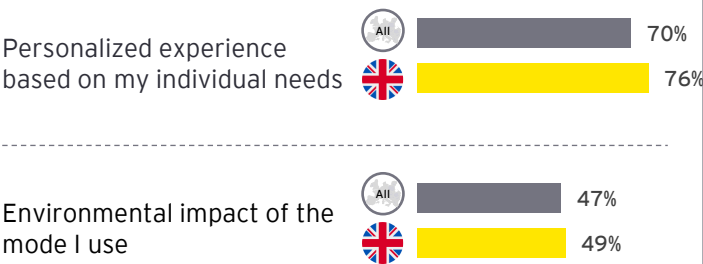
Impact of price inflation on consumer travel habits



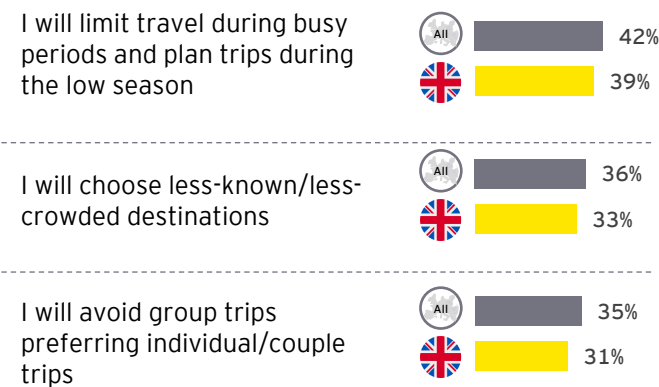
AI: main purposes of use



Importance given to factors of choice



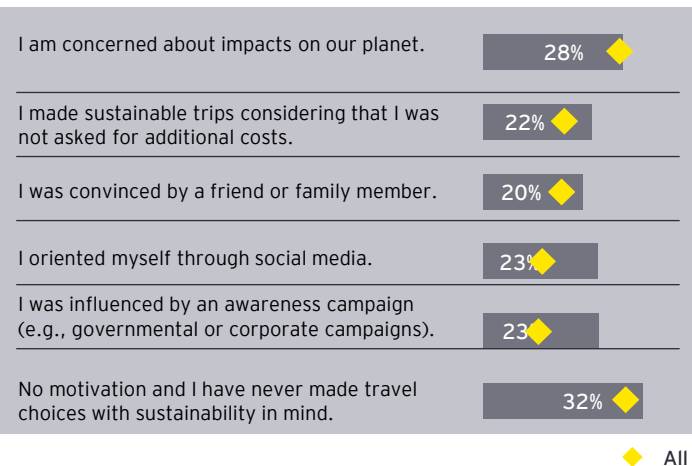
Overtourism: how will influence future travel choices



Attitude toward sustainable travel

Explicit intentions

Reasons behind sustainable travel choices



Implicit attitudes

Concern for environmental issues

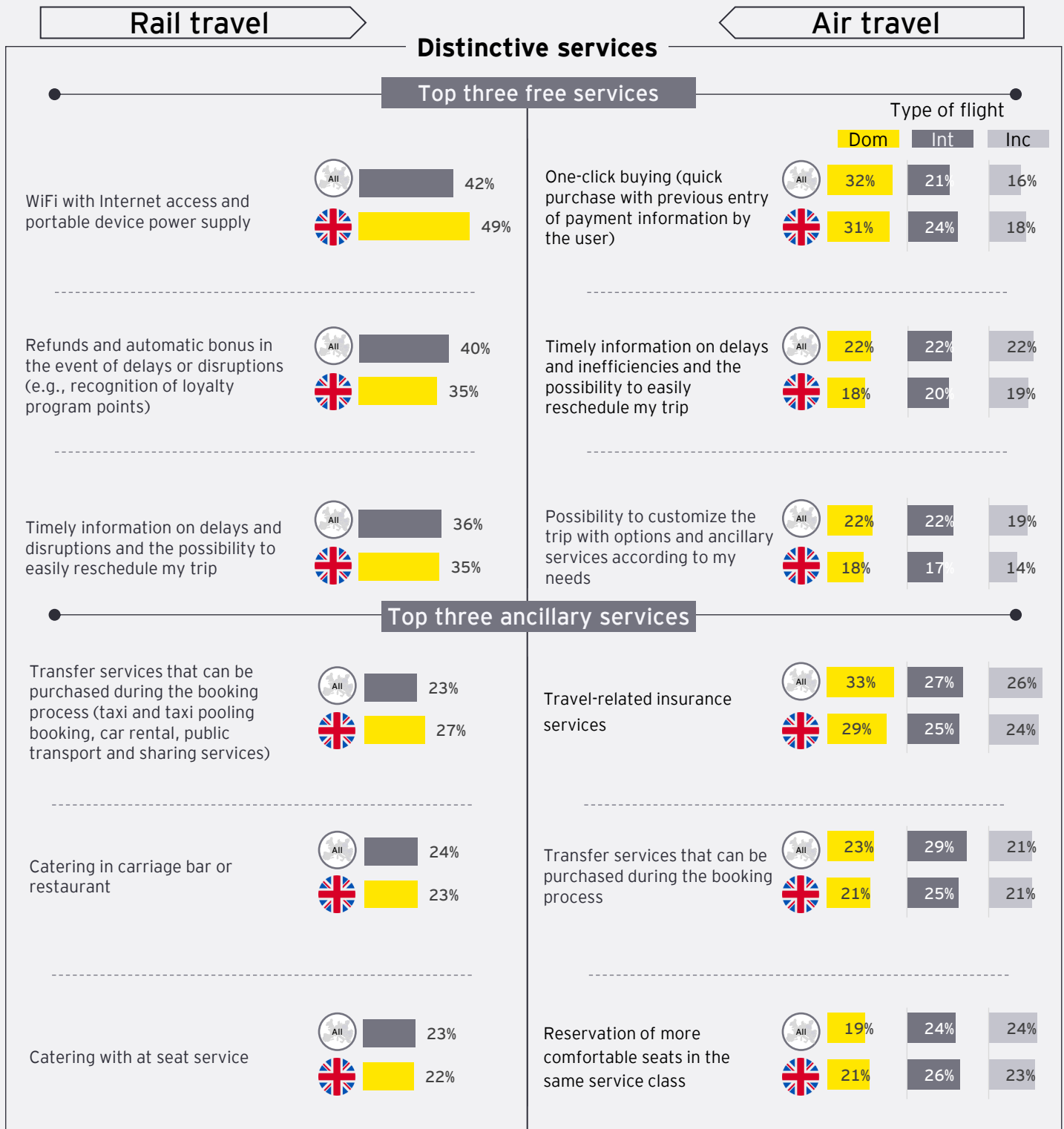


7

Focus UK:

distinctive services required for rail and air travel

In line with the general trend, the free services preferred by UK travelers are related to Wifi for train and quick purchase for air travel. Transfer services (for train travel) and travel insurance (for air travel) are the main ancillary services.



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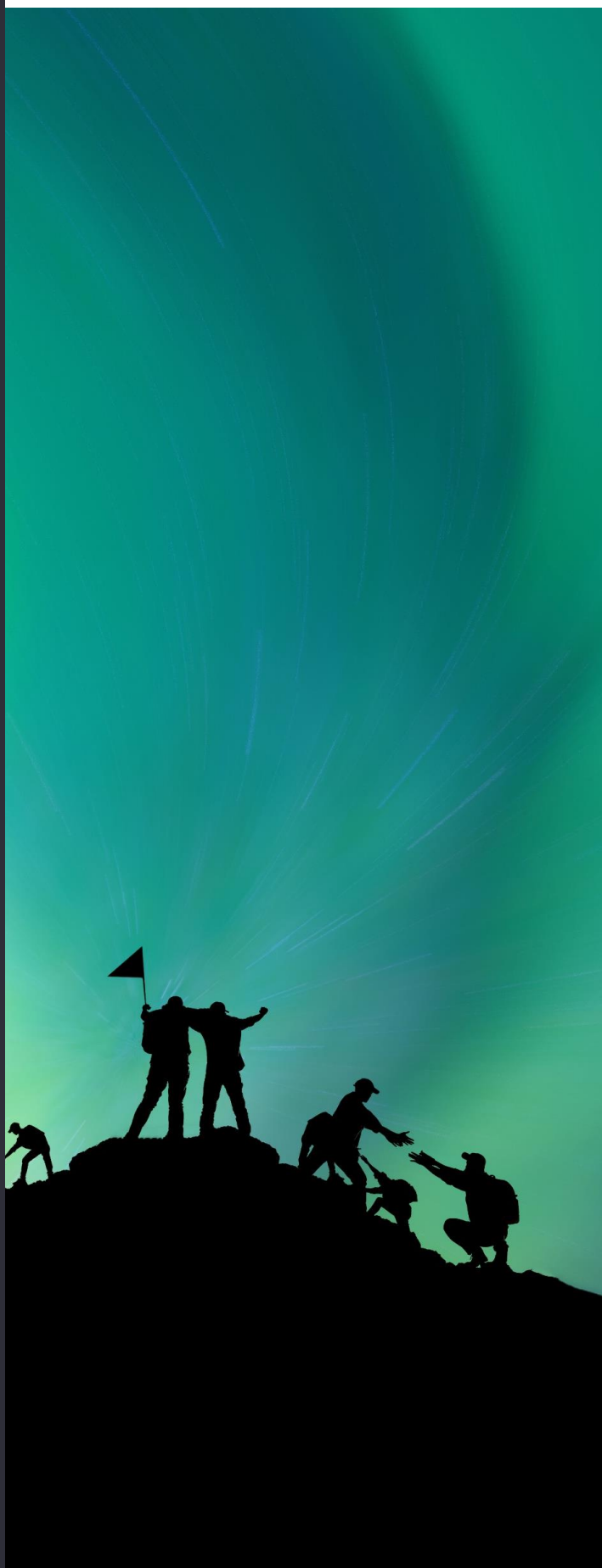
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