

## Press Release

# European tourism ends 2024 strong, driven by robust shoulder season demand

- European tourism saw robust performance during the shoulder season (September–October) and into the winter period.
- Consumers are increasingly opting for value-for-money destinations and shorter stays, likely driven by higher travel costs.
- Long-haul travel recovery continues to lag and is expected to remain 5% below 2019 levels.

**Brussels, 18 February 2025:** European tourism demonstrated strong resilience in the last quarter of 2024 despite economic pressures, geopolitical uncertainties, adverse weather conditions, and evolving consumer behaviour. The European Travel Commission's (ETC) latest report showcases a rise of 6.3% in **foreign arrivals** over 2019 levels and a rise of 6.7% compared to 2023. **Overnight stays** have also grown by 5.9% above 2019, and 4.8% year-on-year.

Published today, the "**European Tourism Trends & Prospects**" Q4 2024 report offers insights into the dynamic performance of European tourism during the autumn and winter period and provides a comprehensive analysis of the region's latest tourism and macroeconomic developments.

While travel performance has remained strong, the report indicates that consumers are increasingly opting for **value-for-money destinations**. This is likely due to higher travel costs caused by elevated service inflation and increased demand for travel. The latest estimate suggests that in 2024, **tourists spent** 7.8% more across Europe than in 2023, equating to €705 billion, with almost three-quarters of total regional spend driven by Western Europe.

Commenting on the publication of this report, **ETC President Miguel Sanz**, said:

*As we look toward 2025, European tourism will continue to navigate an increasingly complex landscape and heightened geopolitical and economic uncertainty. Despite challenges such as rising travel costs and shifting consumer preferences, Europe's tourism sector has shown remarkable resilience. At the same time, we are witnessing positive trends, such as a growing focus on off-season travel, which helps distribute tourism demand more evenly throughout the year. Looking ahead, sustaining this momentum will require strategic investments in diversified offerings to ensure continued performance and competitiveness.*

## Travellers seek value-for-money off-peak season

Tourism performance is stronger across both arrivals and overnights compared to the previous quarter, suggesting travel in the **shoulder season** (September–October) and into the **winter period** remained robust. This trend aligns with growing consumer preference for value-for-money travel, as these months typically offer lower prices.

Additionally, extreme summer temperatures in some sub-regions and fewer travellers may have influenced travel patterns.

## Southern Europe's expansion cools, while Northern Lights draw tourists to Iceland

Following a strong summer period, several **Southern and Mediterranean destinations** saw slower performance in Q4, including Portugal, Serbia, Greece, and Montenegro. Montenegro was the only reporting destination with lower arrivals than in 2023, with tourists likely going elsewhere due to the influx over recent years. Serbia, Portugal, and Greece saw weakened arrivals growth since Q3, but are still up considerably on 2019, by 28.9%, 17.8% and 13.7% respectively. However, some Southern and Mediterranean destinations managed to buck this trend, including Italy, with arrivals up 5.9% and overnight stays 10% ahead of 2019 figures.

**Iceland**, on the other hand, recorded a 14% increase in arrivals over 2019 in Q4, making it the fastest-growing winter tourism destination. The rise was fuelled by increased solar activity, attracting visitors eager to witness the Northern Lights, with strong demand from Germany, the Netherlands, Italy, and the UK.

## Weather events continue to impact travel

Extreme weather events, including flooding, storms and snowfalls, impacted travel across Europe, leading to **flight delays and cancellations** in major hubs such as France, Germany, Spain, and the UK. Spain's province of Valencia was particularly affected by severe flooding, with arrivals growth slowing in November (4.2%) and December (-6.3%) following its strong performance in the rest of the year, when arrivals growth outpaced Spain as a whole.

## Long-haul travel lags behind

Looking ahead, the recovery of long-haul travel is still lagging with final data for 2024 indicating it will remain 5% below 2019 levels. This is largely due to the slow recovery from **Asia/Pacific**, particularly China. Travel demand from this market has been mainly focused on regional trips, with fewer long-haul journeys, especially to Europe, due to limited connectivity and visa requirements. On average, arrivals from China to European destinations are 39.6% below pre-pandemic levels.

In contrast, **US transatlantic travel** helped to sustain momentum during Europe's post-pandemic recovery. However, uncertainty under the Trump administration grows as inflation risks could shrink disposable income, potentially reducing international travel. In Q4, 22 of 27 reporting destinations saw US arrivals surpass 2019 levels, led by Türkiye (+153%), Portugal (+91%), Lithuania (+67%), and Montenegro (+49%).

**The full summary report can be downloaded from: <https://etc-corporate.org/reports/european-tourism-2024-trends-prospects-q4-2024/>**

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## Note to editors

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The **European Travel Commission** (ETC) represents the national tourism organisations of Europe. Established in 1948, ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to promote Europe in third markets. Its 36-member tourism boards work together to build the value of tourism for all the diverse European destinations through cooperation in sharing best practices, market intelligence and promotion. For more information, visit [etc-corporate.org](http://etc-corporate.org).

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