Monitoring Sentiment for Intra-European Travel

Spring & Summer
2025

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

Contents

Research highlights

WAVE 21

This report monitors intentions and short-term plans for domestic and intra-European travel. It is the 21st update since the series began in September 2020.

The findings are based on data collected in March 2025 from respondents in 10 key European markets, focusing on their travel plans between April and September 2025.

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TRAVEL INTENTIONS

- **72% of Europeans plan to travel by September 2025**, down by 3% from the same period last year. The 55+ age group is the most eager (80%), whereas Gen Z's travel intentions have dropped to 54% (-10%).
- **66% of Europeans are planning leisure trips** over the next six months (-8%), while a notable **11% intend to travel for an event** (+3%).
- Intra-regional travel remains Europeans' top choice: **32%** plan to visit a neighbouring country, and **28%** prefer a non-neighbouring European destination.
- **61% of Europeans plan to take multiple** trips from April to September, up 4% from last year.
- **Over half (52%) of Europeans intend to spend their next holiday in just one city**, while **37% plan to explore multiple places** within the country they will visit.
- **Well-established tourist destinations attract 53%** of travellers ahead of the peak travel season. **35%** will opt for less popular tourist destinations, and **13%** plan to escape to off-the-beaten-path locations.
- Southern/Mediterranean Europe is still the most popular region (41%), though **interest has dropped by 8%**, possibly due to rising temperatures.

Comparisons vs a year ago (April 2024)

Research highlights

WAVE 21

TRIP PLANNING

- **Half of Europeans (50%) have already booked** their next holiday.
- This spring and summer, **Europeans plan for longer stays and higher budgets**: 42% intend to stay at the destination for 7–12 nights (+11%), and 47% plan to allocate budgets of over €1,500 (+13%).
- **Accommodation is the top expense for 27%**, followed by food & drinks (20%) and activities (16%).

TRAVEL CONCERNS

- **Affordable prices** (22%), **destination safety** (18%), and **pleasant and stable weather** (14%) are the main factors influencing Europeans' choice of destination over the next six months.
- The most pressing travel-related concerns include **travel price inflation** (17%), **the economic situation and personal finances** (14%), **the ongoing war between Russia and Ukraine** (14%) and the tension in the Middle East (9%).
- **28% of travellers now prefer destinations with milder climates** and less extreme temperatures, driven by climate change concerns.

Comparisons vs a year ago (April 2024)

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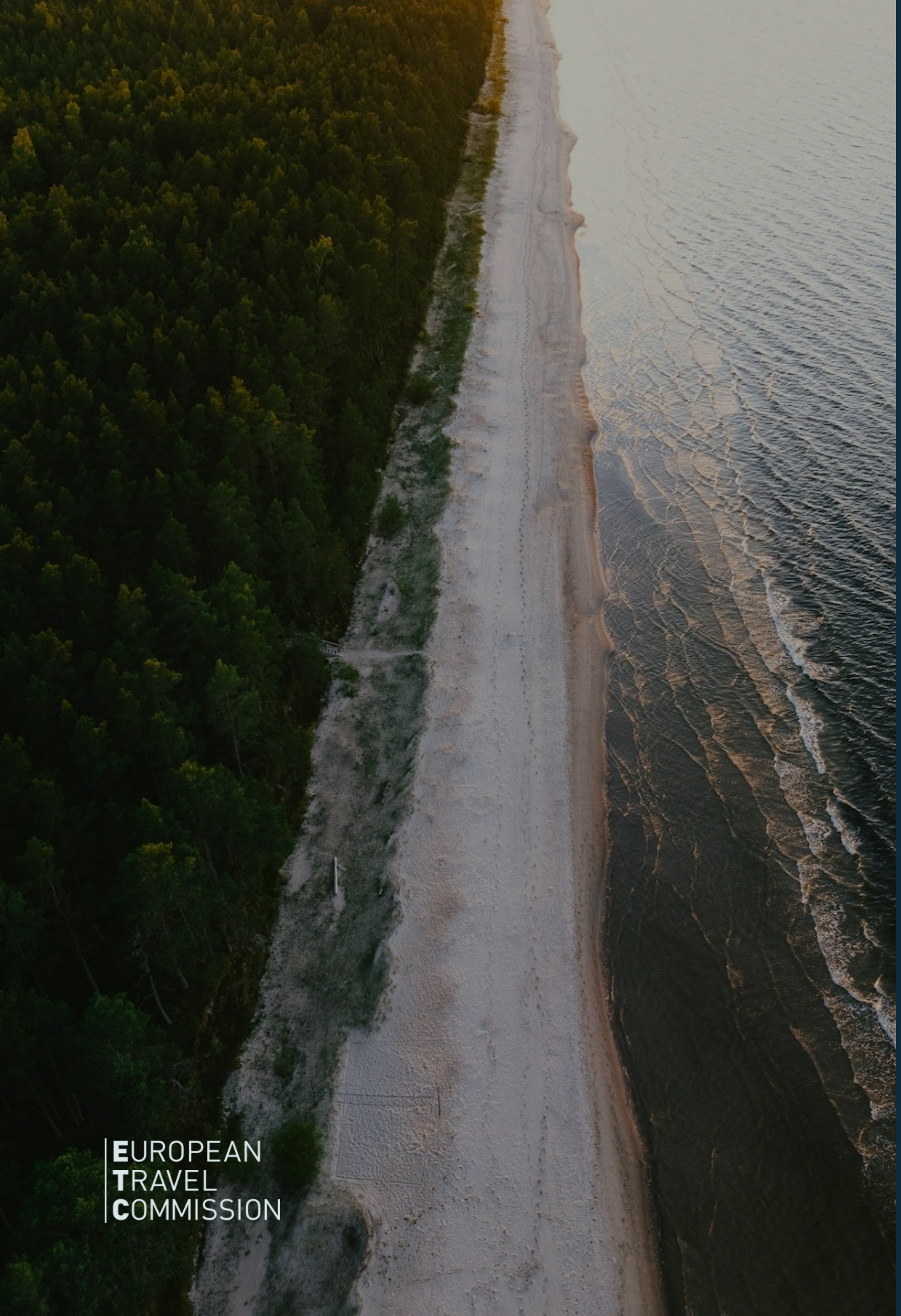


WAVE 21

Recommendations for destinations

- As 37% of travellers wish to explore multiple locations within the same country, destinations should **collaborate with nearby cities and regions** to offer multi-stop itineraries, promote regional travel routes, and improve transportation links.
- With a growing number of Europeans travelling for events, destinations can use music, culinary, or sports **events as a strategic tool to disperse travellers across seasons and locations**—helping to balance visitor flows and extend tourism beyond peak periods.
- As 25% of Sun & Beach travellers intend to spend most of their budget on food and beverages, **beach destinations should promote the local culinary scene**, restaurants beyond city centers, and food producers in nearby regions—to better attract these visitors and encourage broader spending beyond beach-front businesses.
- With more travellers using generative AI to plan cultural and heritage trips, destinations can improve their offer and expand their traveller reach by leveraging **AI-powered itinerary planning tools, booking, and in-destination guidance**.

WAVE 21

Recommendations for businesses

- 53% of older Millennials (aged 35–44) plan to stay at the destination for over 7 nights, and businesses can target this segment with **special offers for longer stays and immersive experiences designed for travellers seeking more than just quick tours.**
- Around a third (34%) of Europeans planning domestic holidays in the coming months are over 55 years old. Businesses that target this segment can boost early bookings, which are lower for domestic trips, by **offering limited-time deals for early reservations and focusing on promotions to locals over the age of 55**.
- 17% of travellers check the weather before finalising their travel plans, so hotels, tourist activities, and even cities could highlight their flexibility by offering **cancellation possibilities during extreme weather periods** to build trust and confidence and achieve higher booking rates.
- With climate change impacting travel decisions and patterns, tourism businesses in warmer areas should **promote indoor activities** during warmer hours and focus their marketing and sales plans on **milder shoulder seasons**.

WAVE 21

Reading the data

Data collection periods

Wave 21	3-17 March 2025
Wave 20	7-23 September 2024
Wave 19	25 May -7 June 2024
Wave 18	2-17 April 2024
Wave 17	8 May- 4 June 2023

Travel timings for Wave 21

Use these time periods as a reference for the desired travel period:

In 1-2 months:	April-May 2025
In 3-4 months:	June-July 2025
In 5-6 months:	August-September 2025

Analysed samples

- Total respondents: 5,874
- Respondents most likely to travel in the next six months: 4,313
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 4,925

Significant changes

Changes are considered significant with a 2.5% threshold and marked with these symbols:

Increase ▲ Decrease ▼

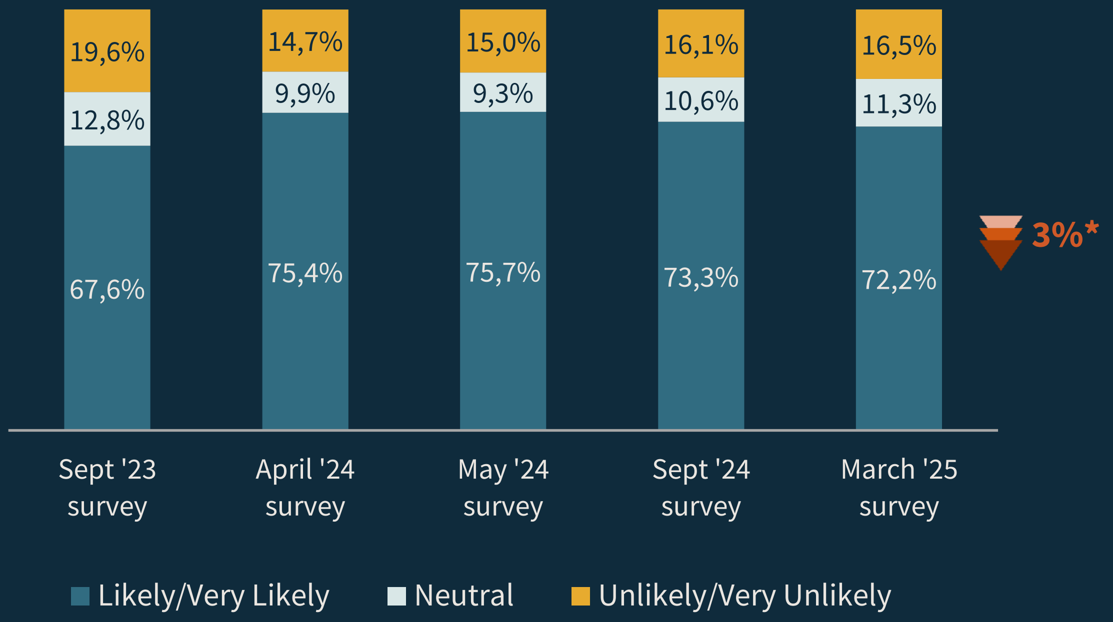
All data and insights refer to domestic and intra-European travel unless otherwise stated.

Travel intentions

01

72% of Europeans plan to travel by September 2025, down by 3% from last year

Intention to travel in the next six months



Q5. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

Top three markets most likely to travel in the next six months

POLAND

80%

UK

78%

SPAIN

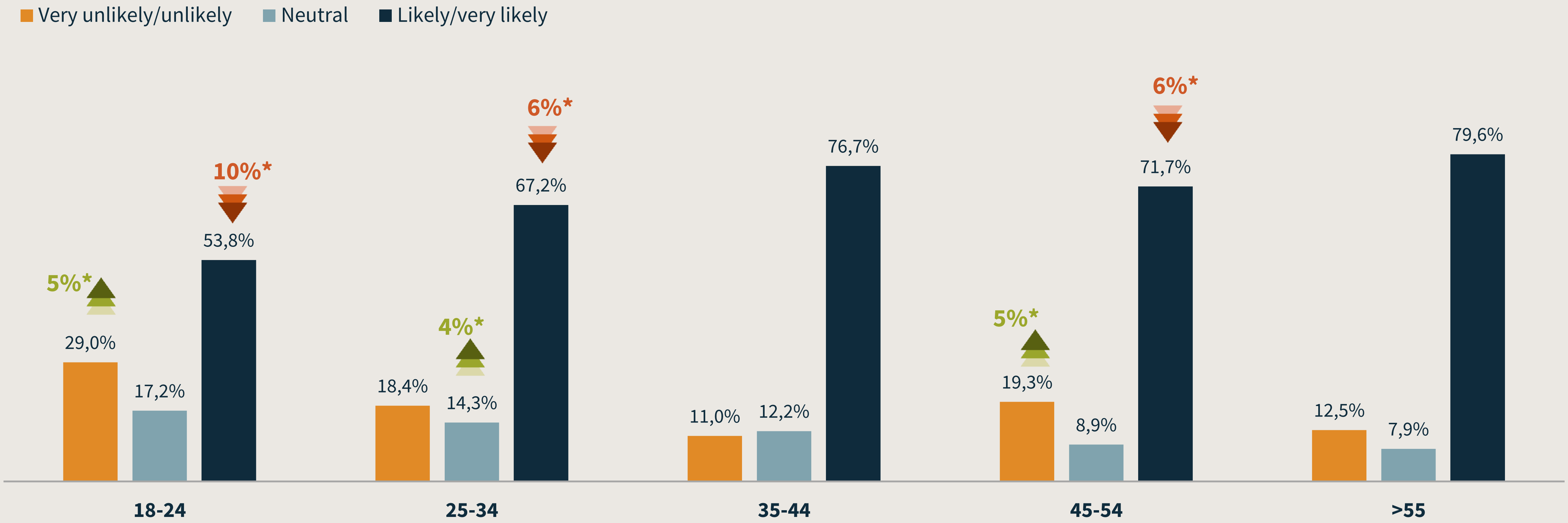
75% 5%*

* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 5,974

Europeans over the age of 55 are the most eager to travel, whereas intentions of Gen Z travellers drop by 10%

Intention to travel in the next six months by age group



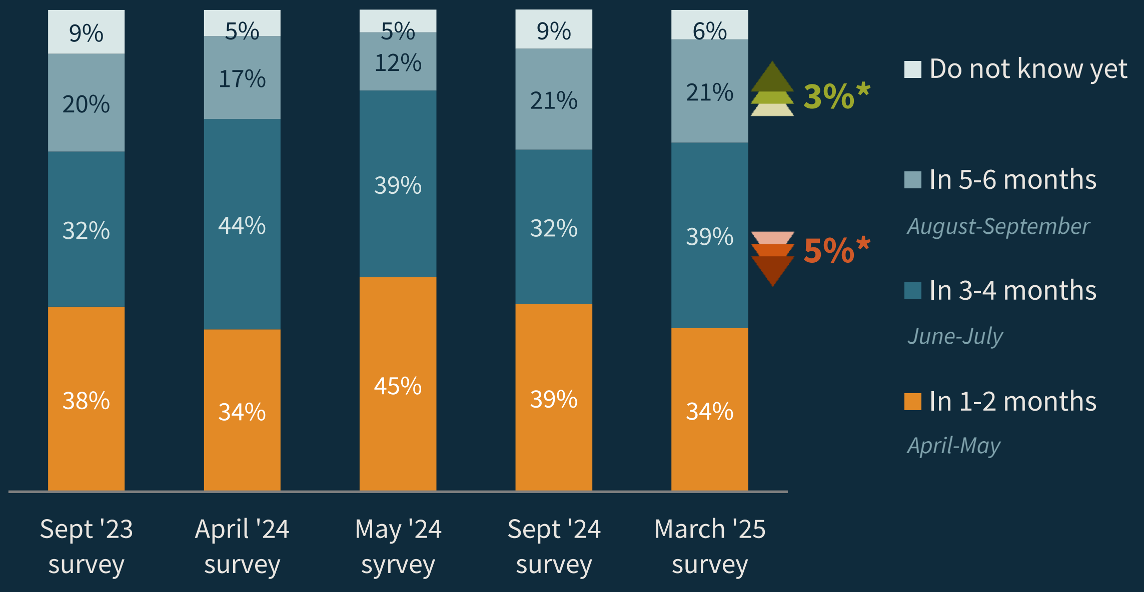
* Statistically significant difference vs a year ago (April 2024)
Q5. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

No. of respondents: 5,974

May and June are the most popular travel months (40%), while 29% of Europeans will wait until July or August to take their next trip

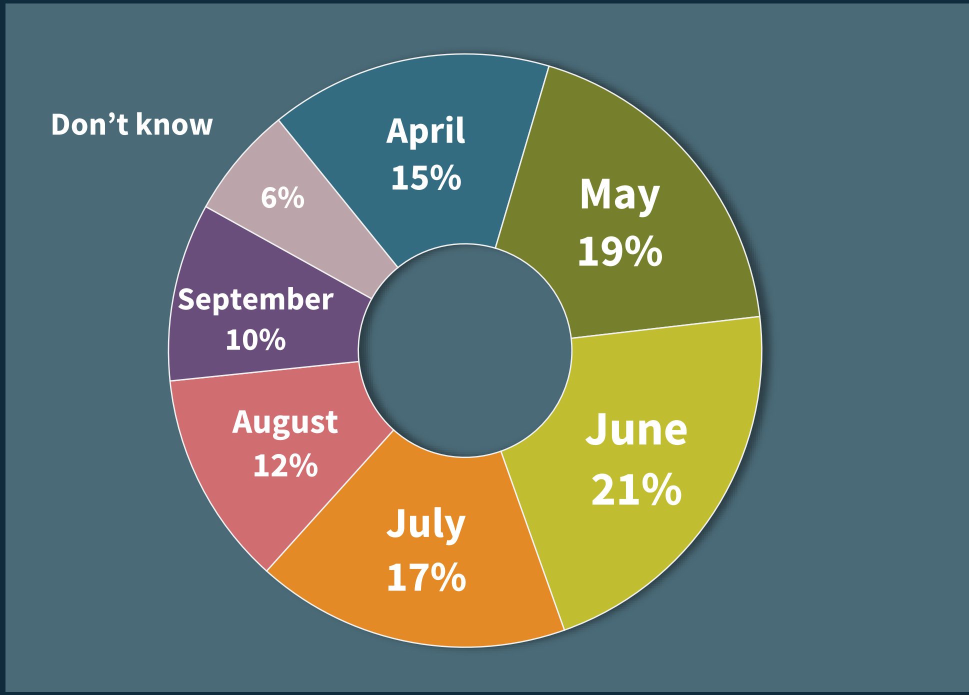
When will Europeans travel next?

Travel period



When will Europeans travel next?

Travel month



Q9. When are you most likely to go on your next trip either in your country or within Europe?

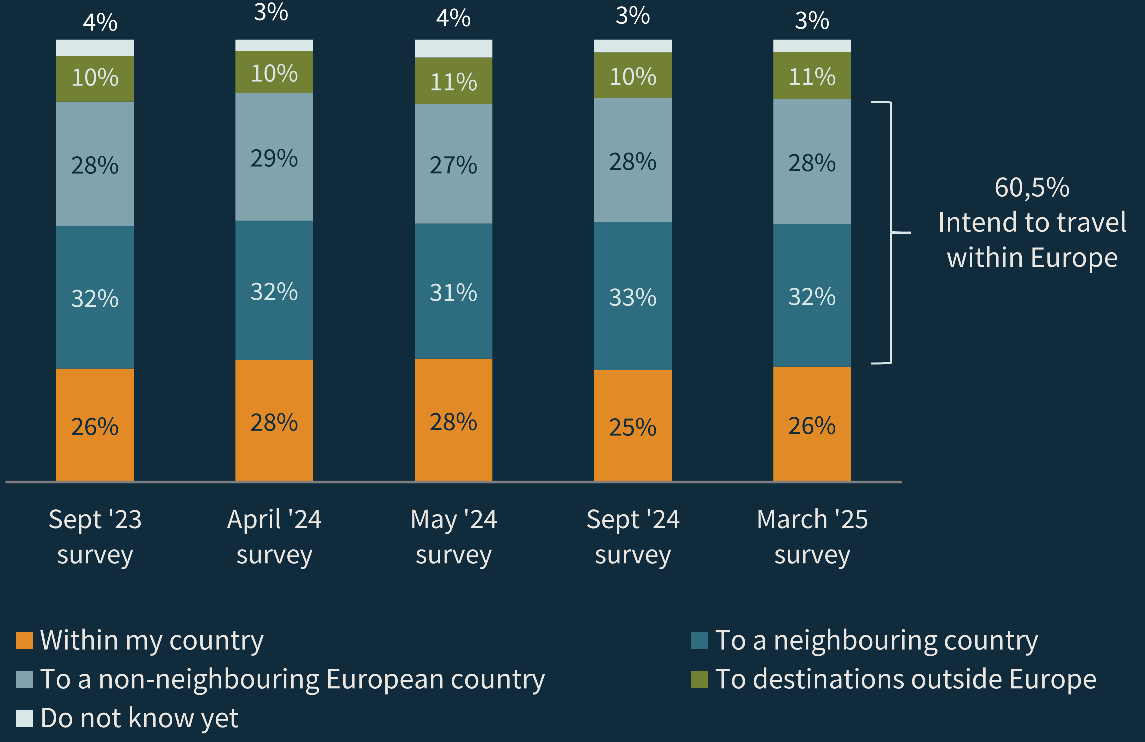
* Statistically significant difference vs a year ago (April 2024)

NOTE: Travel periods are slightly different than the ones examined in April 2024, thus comparisons should be read with caution

No. of respondents: 4,313

Most Europeans plan to take intra-regional trips rather than travel domestically or head overseas

Where will Europeans travel within the next 6 months?

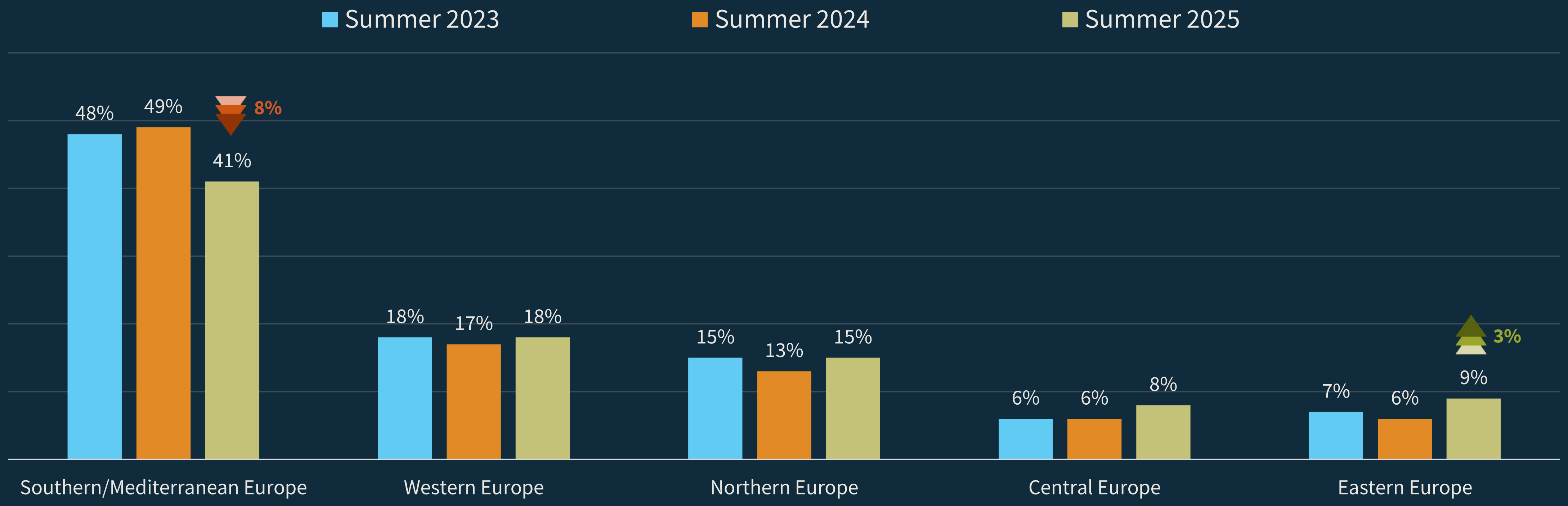


Q9. Where do you plan to travel in the next 6 months?

* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 4,313

Travel to Southern/Mediterranean Europe drops by 8%, likely due to the increased demand for more stable weather



Statistically significant difference vs the previous year

Definitions of the regions can be seen in the Methodology

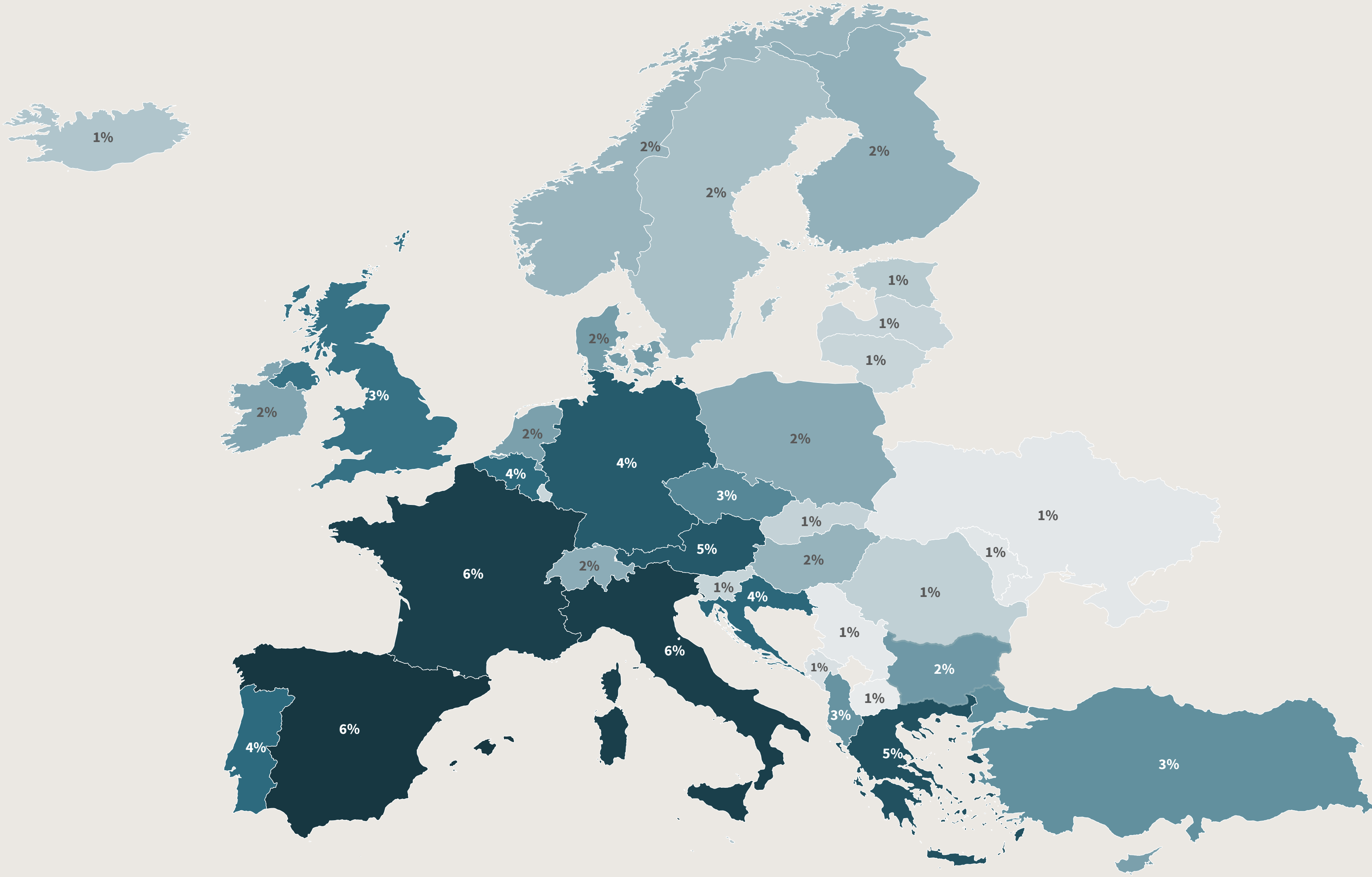
No. of respondents: 4,925

Preferred countries for the next intra-European trip

Horizon April-September ‘25

TOP 10 COUNTRIES

Spain	**6.5%**
Italy	**6.0%**
France	**5.9%**
Greece	**4.9%**
Austria	**4.5%**
Germany	**4.4%**
Croatia	**3.7%**
Belgium	**3.7%**
Portugal	**3.5%**
UK	**3.3%**

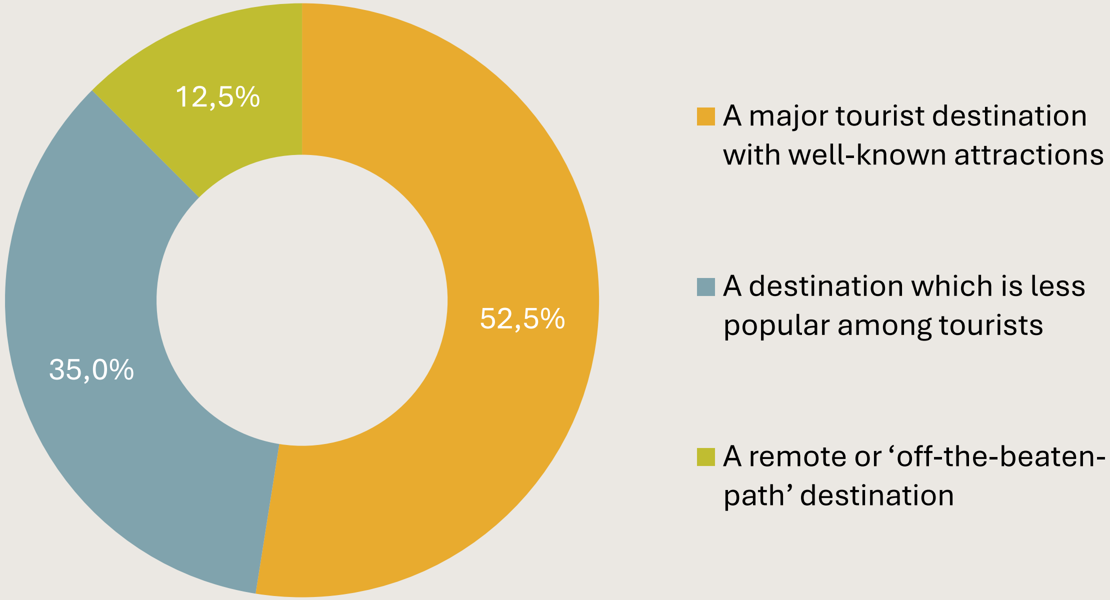


Q11. To which country(ies) do you plan to travel next?

No. of respondents: 4,925

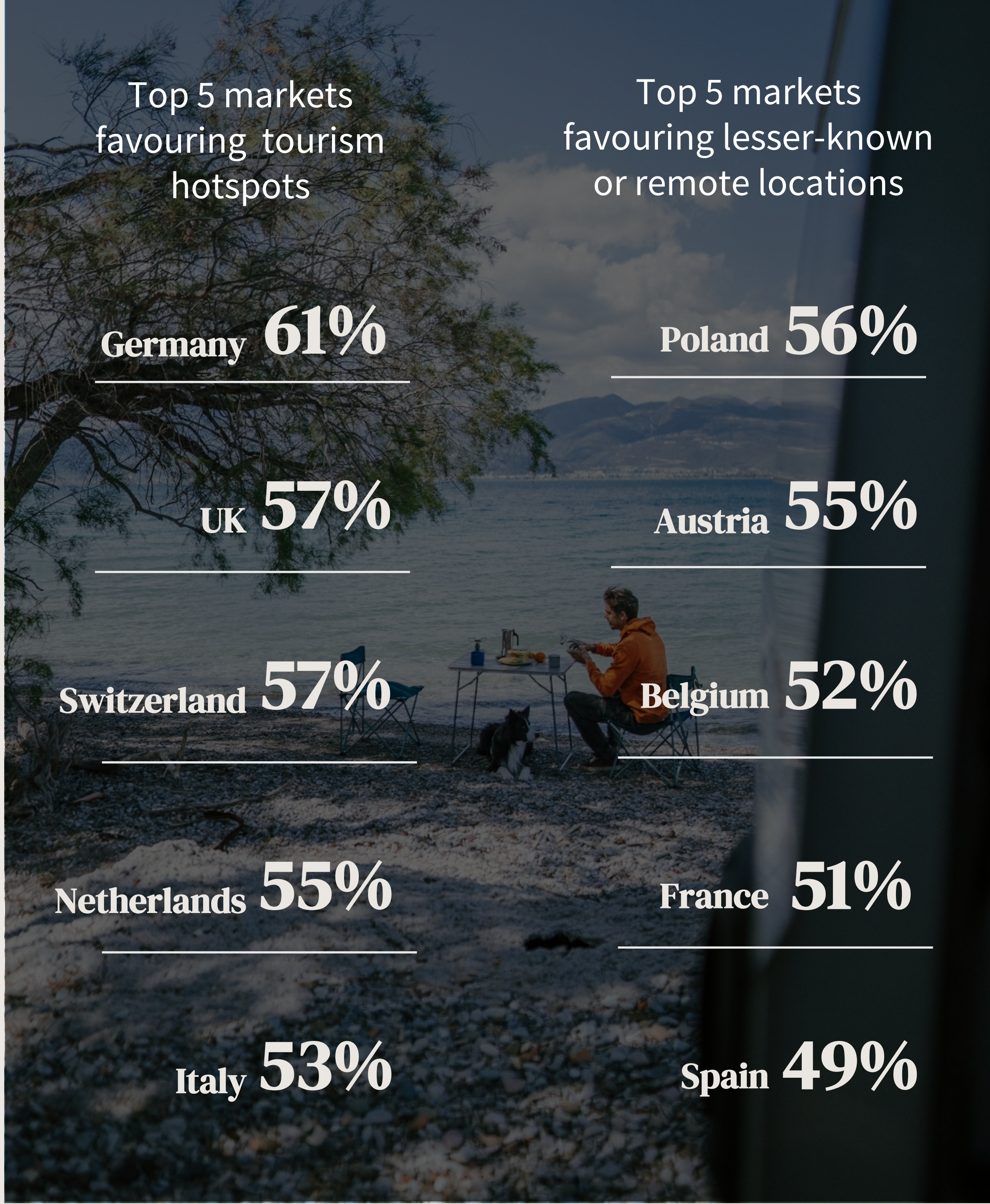
Well-established destinations attract 53% of travellers, compared to 13% aiming to travel off-the-beaten-path

Type of destination for the coming trip



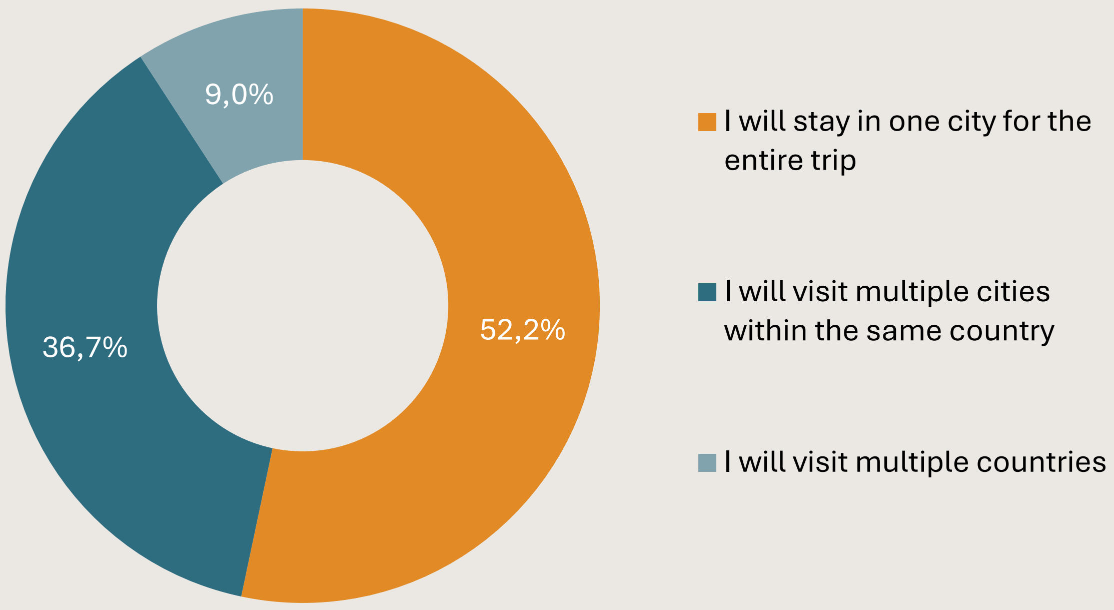
Q12. Thinking of the next country you intend to visit, in what type of destination, within it, do you plan to spend most of your time?

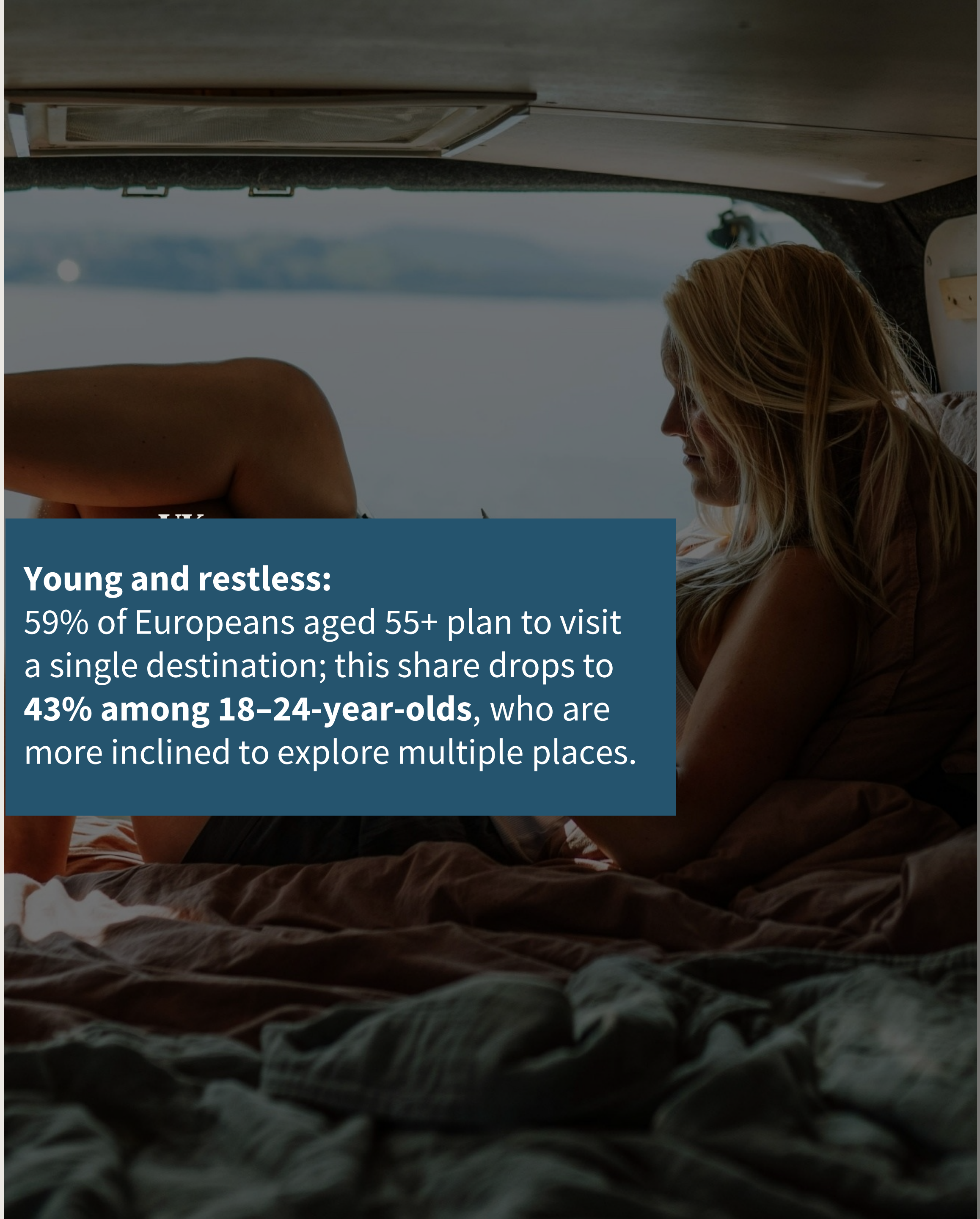
No. of respondents: 4,313



While one-city stays are the top choice for most Europeans, younger travellers prefer more dynamic journeys

Planned itinerary for the next trip





Young and restless:
59% of Europeans aged 55+ plan to visit a single destination; this share drops to **43% among 18–24-year-olds**, who are more inclined to explore multiple places.

Q10. What kind of itinerary do you plan for your next trip within Europe?

No. of respondents: 4,313

Travellers’ patterns by destination type

	Major tourist destination	Less popular destination	Off-the-beaten-path destination
	Popular destinations with well-known attractions	Destinations that are less popular among tourists	Remote destinations, with minimal tourist infrastructure
>2,501 Euros	18%	13%	21%
1,001-2,500 Euros	54%	50%	46%
<1,001 Euros	29%	37%	33%
>10 nights	20%	21%	38%
7-9 nights	32%	28%	22%
<7 nights	48%	51%	40%
Visit multiple countries	7%	8%	19%
Visit multiple cities	38%	41%	37%
Staying in one city	55%	52%	44%

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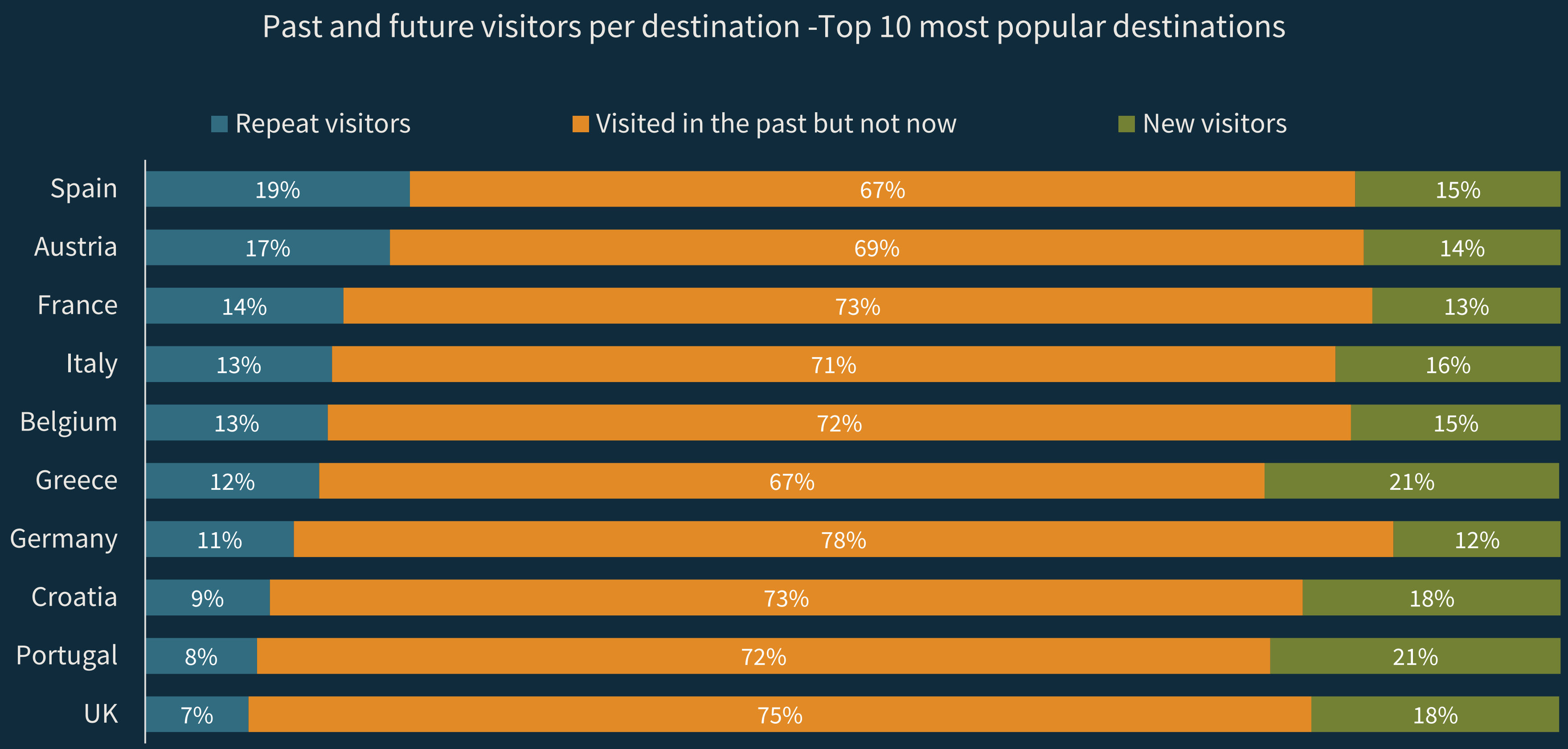
No. of respondents: 4,313

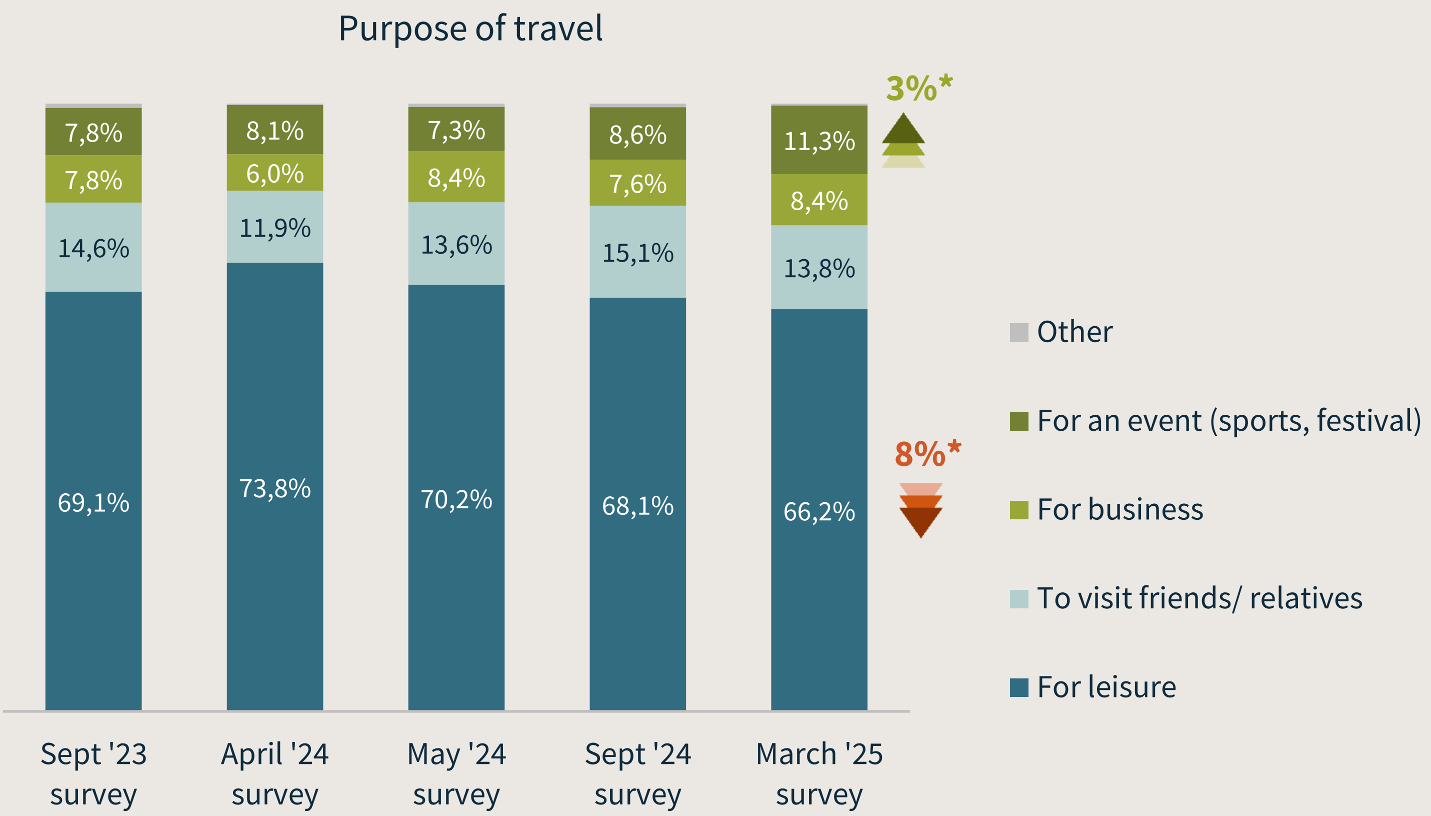
France and Germany stand out as the destinations achieving a most balanced mix of new and repeat visitors, followed by Belgium



Q1. Which European countries have you visited in the past three years (2023-20234/25)?
Q11. To which country(ies) do you plan to travel next?

NOTE: The sample includes respondents with past experience or future intentions to visit the destinations. It excludes domestic travellers. Total No. of cases: 7,957

Leisure remains the top travel purpose despite an 8% decline, while event travel rises by 3%



Q7. For what reason are you most likely to travel within Europe next?

* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 4,313

Top 3 markets to take a leisure trip	Top 3 markets to take a business trip
UK 80%	**Switzerland** 15% ▲ 8%*
Poland 75%	**Netherlands** 12%
Spain 75% ▼ 8%*	**Belgium** 11%

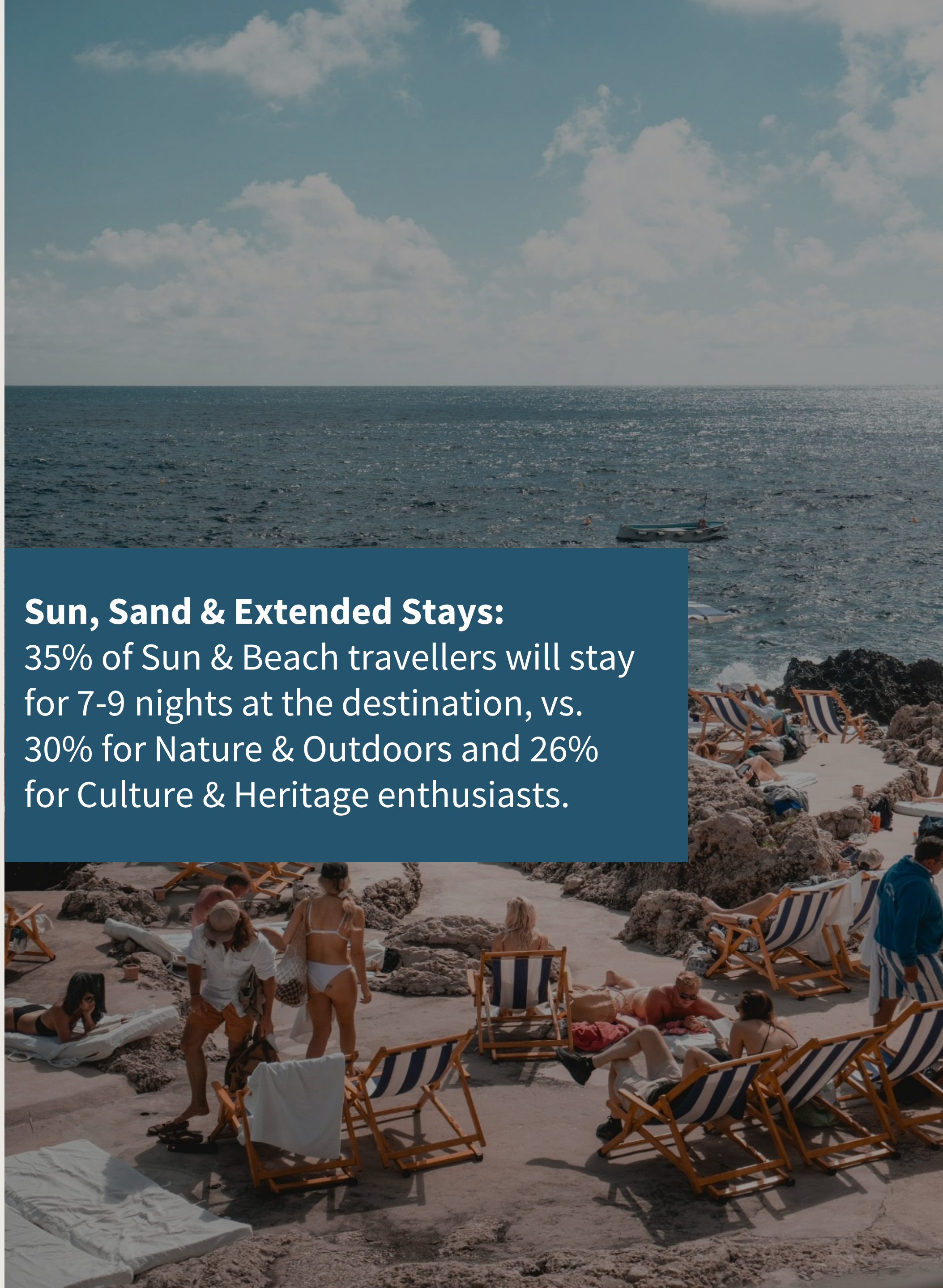
Results for business trip per country are indicative due to small sample bases

23% of Europeans plan to centre their next holiday around the Sun & Beach theme

Preferred type of leisure trip in the next six months

Q16. What type of leisure trip within Europe are you most likely to undertake next?
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 4,313



Sun, Sand & Extended Stays:
35% of Sun & Beach travellers will stay for 7-9 nights at the destination, vs. 30% for Nature & Outdoors and 26% for Culture & Heritage enthusiasts.

Popular types of trips and experiences

Analysis of preferred types of leisure trip by age, length of stay, budget, types of experiences and preferred destinations

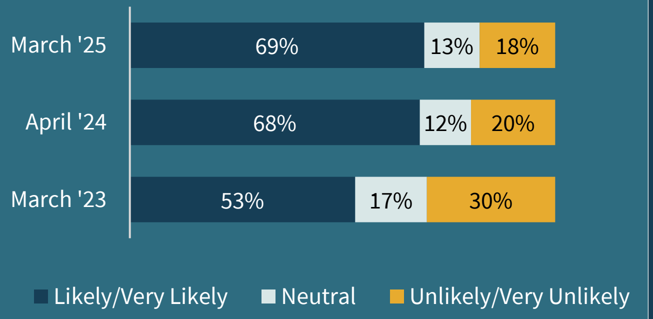
	Sun & Beach		Culture & Heritage		Nature & Outdoors		City Break	
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	**35%** >55	**24%** 35-44	**20%** 45-54	**19%** >55	**16%** 45-54	**16%** 25-34	**15%** >55	**15%** 45-54
MOST COMMON LENGTH OF STAY & BUDGET	**35%** 7-9 nights	**25%** 500-1000 €	**44%** 4-6 nights	**25%** 1001-1500 €	**34%** 4-6 nights	**23%** 500-1000 €	**49%** 4-6 nights	**28%** 500-1000 €
	27% 4-6 nights	**22%** 1001-1500 €	**26%** 7-9 nights	**23%** 500-1000 €	**30%** 7-9 nights	**20%** 1001-1500 €	**25%** up to 3 nights	**24%** 1001-1500 €
TOP DESTINATIONS	**16%** Spain **11%** Greece **8%** Italy **6%** France		**7%** France **6%** Italy **5%** Germany **5%** UK		**6%** France **5%** Germany **5%** Austria **4%** Italy		**9%** Italy **8%** France **6%** Germany **5%** UK	

No. of respondents: 4,313

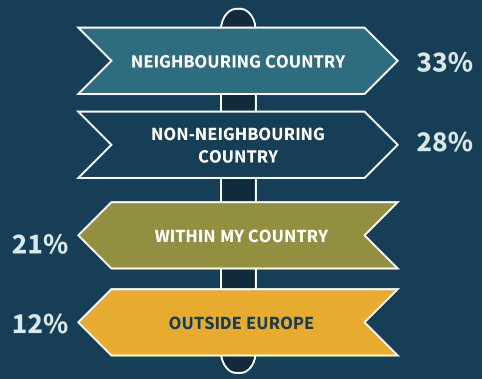
Austrians' travel plans

Travel horizon: April-September 2025

INTENTION TO TRAVEL



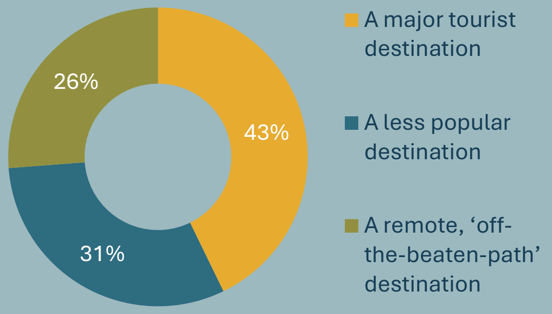
WHERE TO?



TRAVELLING WITH?

33%	29%	11%
With partner	With family	Solo

TYPE OF DESTINATION

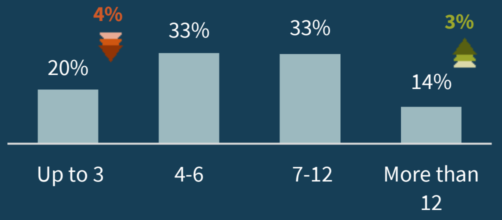


TOP SPENDING PRIORITIES

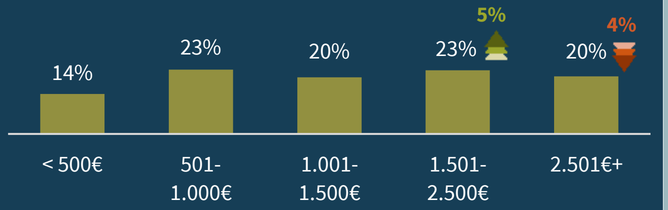
29%	Accommodation
18%	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	11%
Croatia	9% 3%
Germany	6% 3%
Greece	5%
Spain	5%

** Based on total sample, without reference to domestic trips

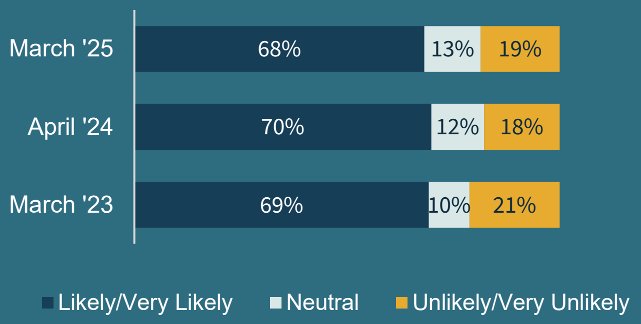
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 500 (total sample of respondents per country)

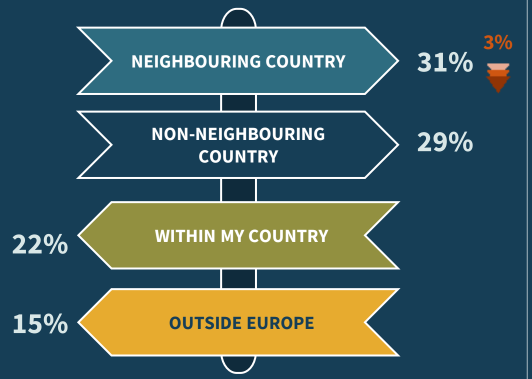
Belgians' travel plans

Travel horizon: April-September 2025

INTENTION TO TRAVEL



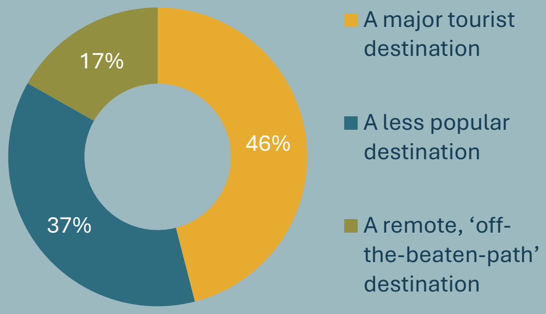
WHERE TO?



TRAVELLING WITH?

32%	30%	11%
With partner	With family	Solo

TYPE OF DESTINATION

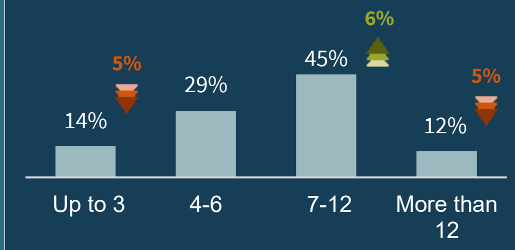


TOP SPENDING PRIORITIES

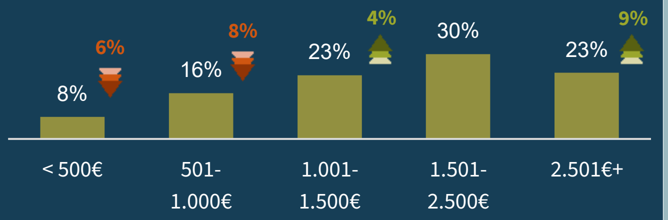
22%	Accommodation
18%	Food & Drinks
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	13% 3%
Italy	7%
Austria	6%
Spain	5% 4%
Albania	5% 3%

** Based on total sample, without reference to domestic trips

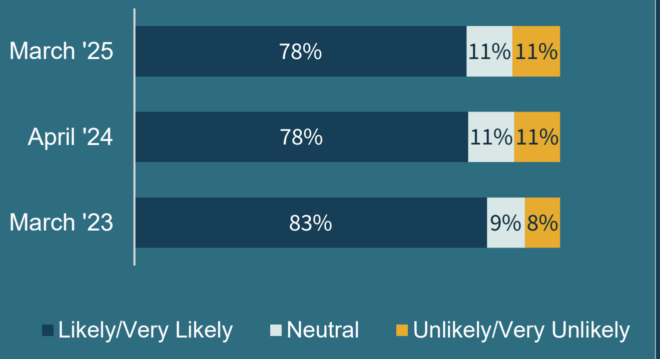
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 500 (total sample of respondents per country)

Britons’ travel plans

Travel horizon: April-September 2025

INTENTION TO TRAVEL



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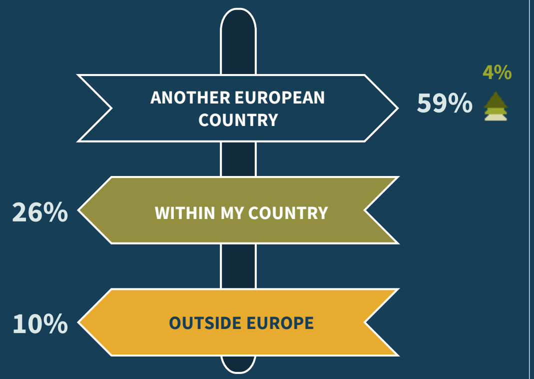

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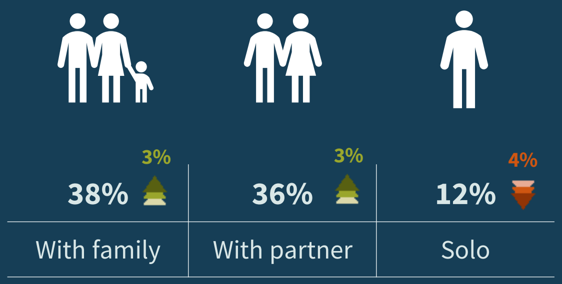
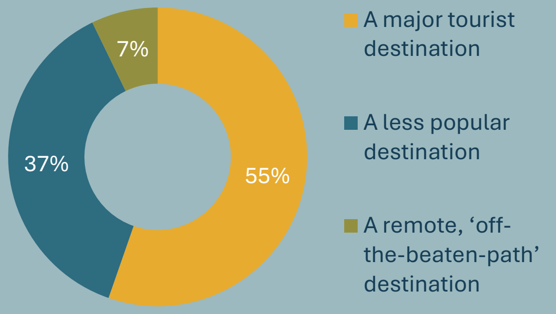


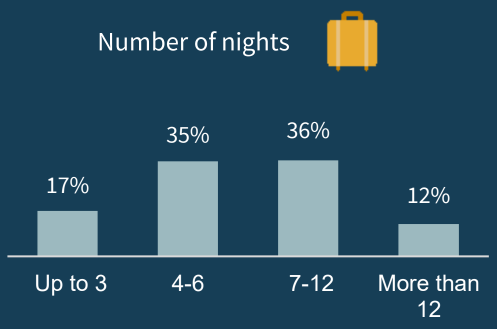
TYPE OF DESTINATION

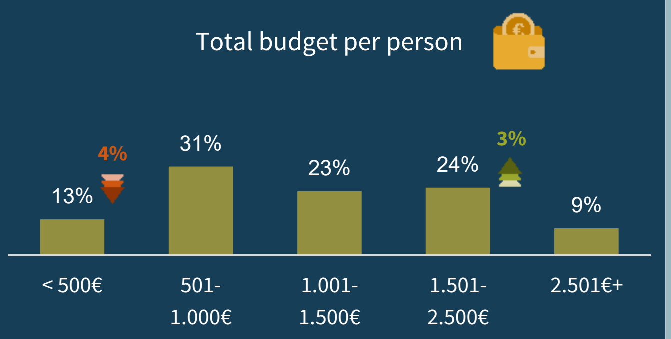


TOP SPENDING PRIORITIES

29%	Accommodation
26%	Food & Drinks
17%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	16%
France	10%
Italy	7%
Greece	7%
Germany	6%

** Based on total sample, without reference to domestic trips

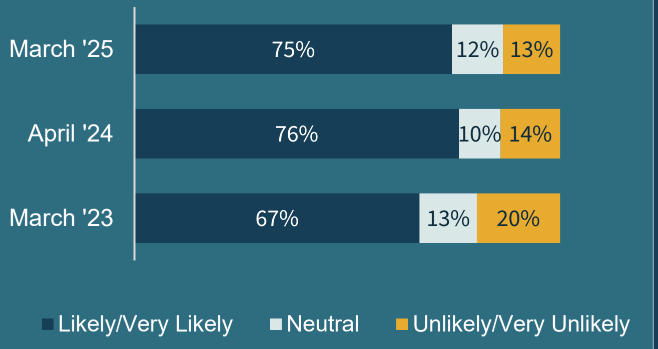
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 750 (total sample of respondents per country)

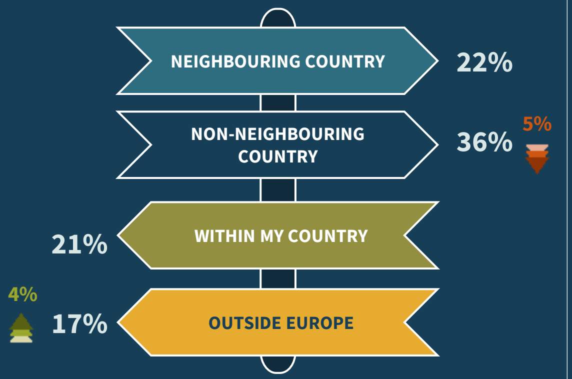
Dutch travel plans

Travel horizon: April-September 2025

INTENTION TO TRAVEL



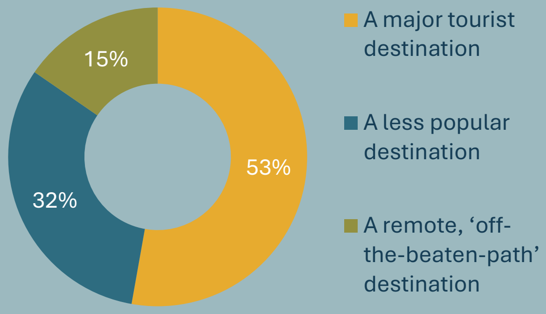
WHERE TO?



TRAVELLING WITH?

33%	26%	12%
With partner	With family	Solo

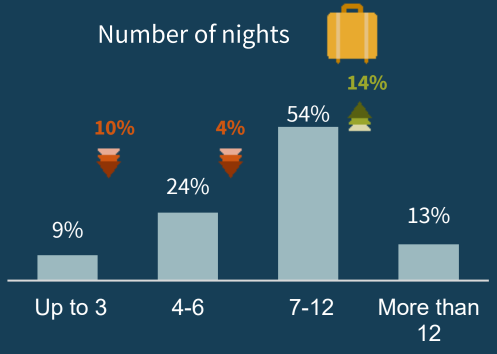
TYPE OF DESTINATION

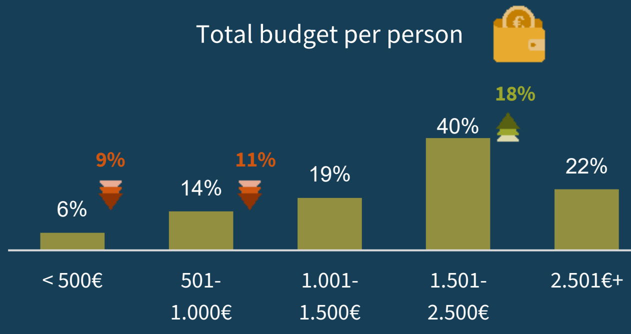


TOP SPENDING PRIORITIES

19%	Accommodation
19%	Food & Drinks
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Belgium	10% (5%)
Austria	8%
Spain	5% (5%)
Italy	5%
Germany	5% (5%)

** Based on total sample, without reference to domestic trips

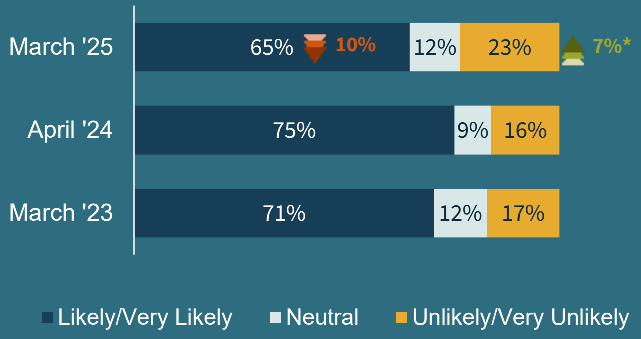
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 500 (total sample of respondents per country)

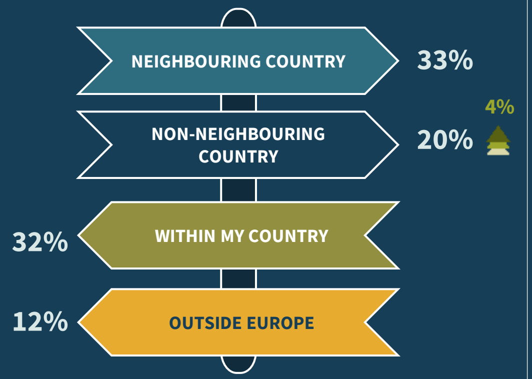
French travel plans

Travel horizon: April-September 2025

INTENTION TO TRAVEL



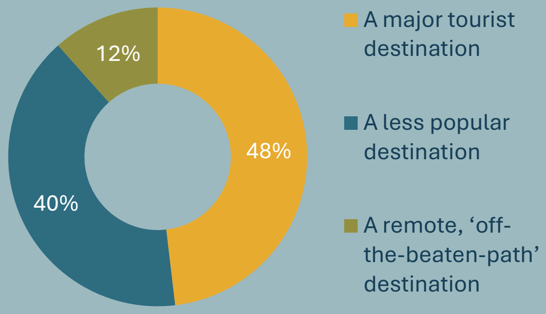
WHERE TO?



TRAVELLING WITH?

With partner	With family	Solo
33% (5%)	30% (8%)	13% (4%)

TYPE OF DESTINATION

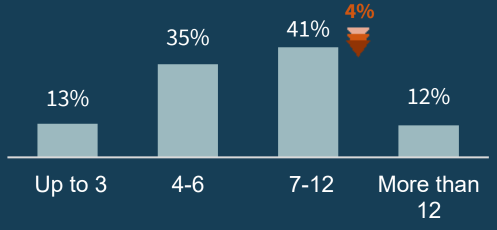


TOP SPENDING PRIORITIES

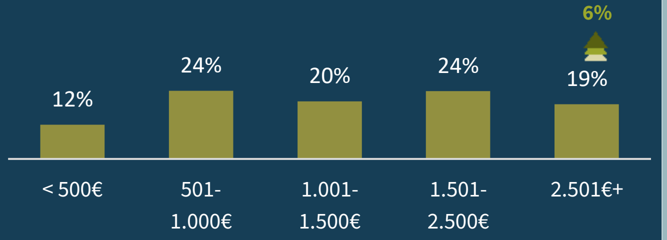
27%	Accommodation
16%	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	8%
Spain	6% (3%)
Portugal	6%
Austria	5%
Greece	5% (4%)

** Based on total sample, without reference to domestic trips

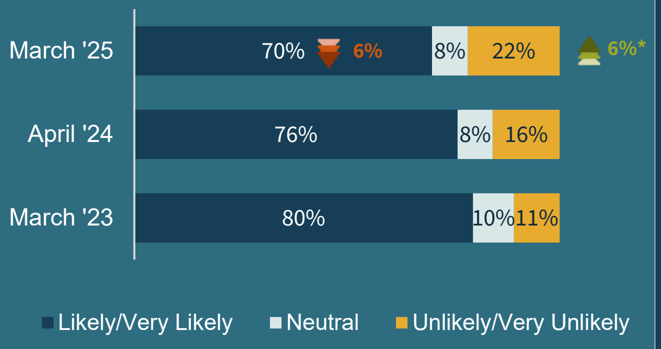
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 750 (total sample of respondents per country)

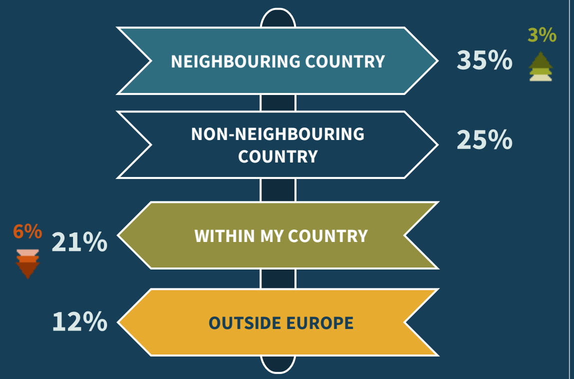
Germans' travel plans

Travel horizon: April-September 2025

INTENTION TO TRAVEL



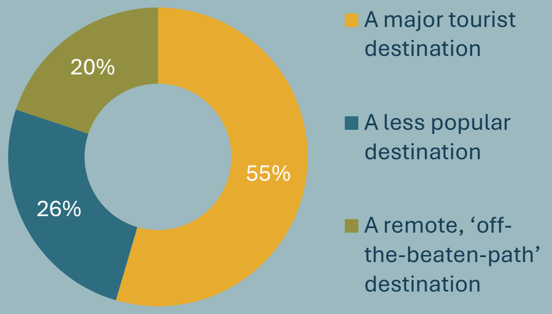
WHERE TO?



TRAVELLING WITH?

31%	26% (6%)	16%
With family	With partner	Solo

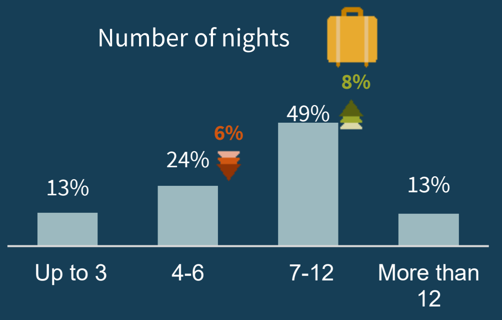
TYPE OF DESTINATION

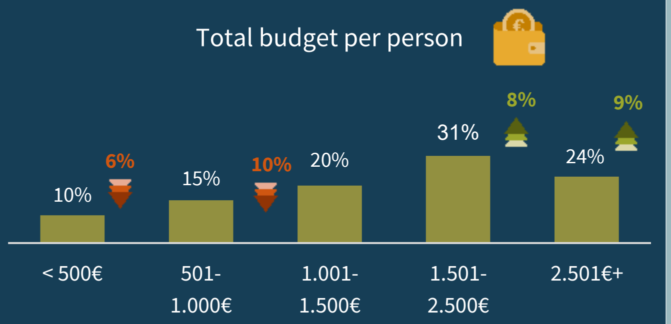


TOP SPENDING PRIORITIES

22%	Accommodation
18%	Food & Drinks
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	6%
Austria	6% (3%)
France	5%
Italy	5%
Greece	4%

** Based on total sample, without reference to domestic trips

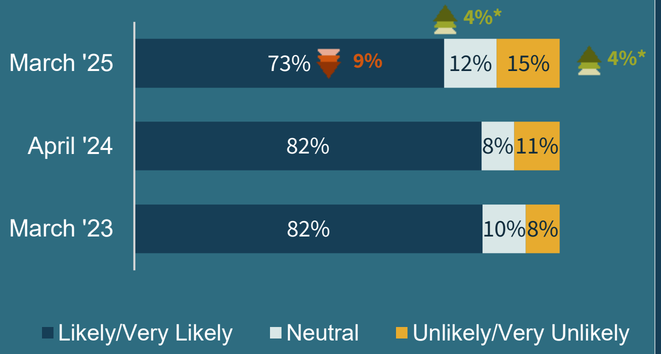
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 750 (total sample of respondents per country)

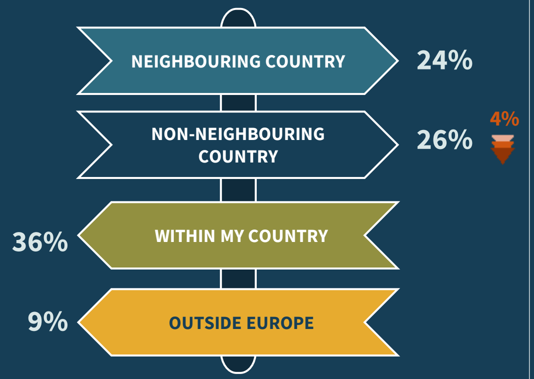
Italians' travel plans

Travel horizon: April-September 2025

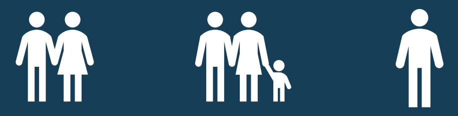
INTENTION TO TRAVEL



WHERE TO?

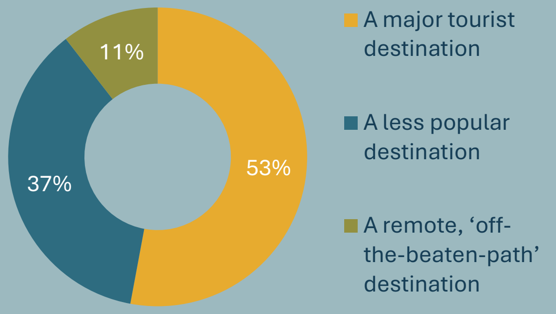


TRAVELLING WITH?



37%	30% (4%)	11% (4%)
With partner	With family	Solo

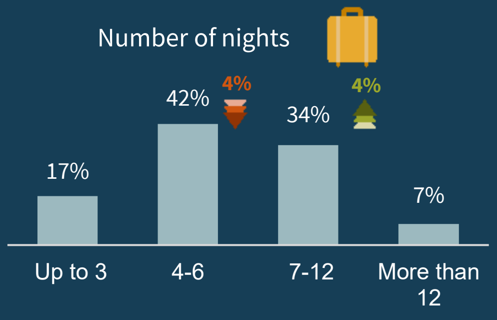
TYPE OF DESTINATION

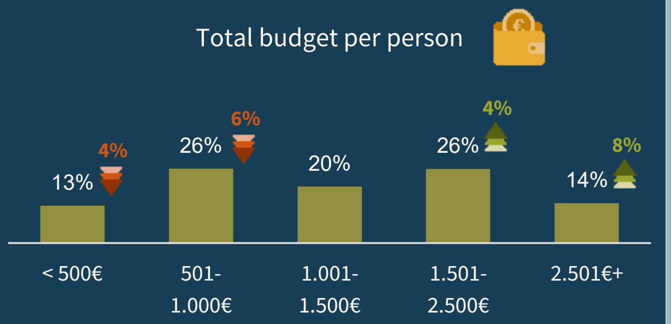


TOP SPENDING PRIORITIES

26%	Accommodation
23%	Food & Drinks
17%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	7%
Spain	7% (6%)
Greece	6%
Germany	5%
Austria	5%

** Based on total sample, without reference to domestic trips

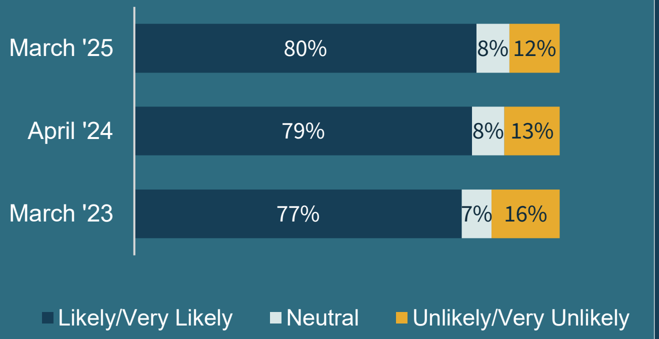
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 750 (total sample of respondents per country)

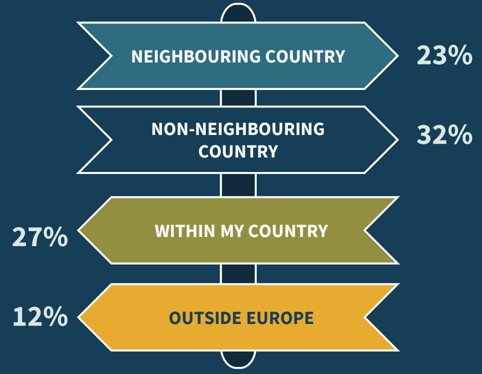
Poles' travel plans

Travel horizon: April-September 2025

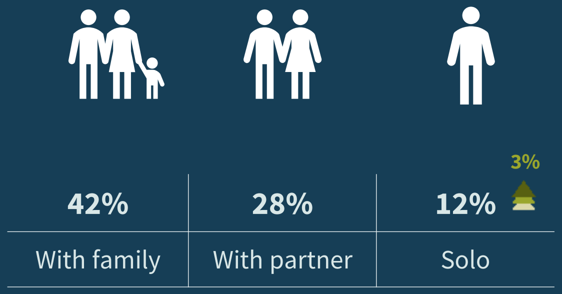
INTENTION TO TRAVEL



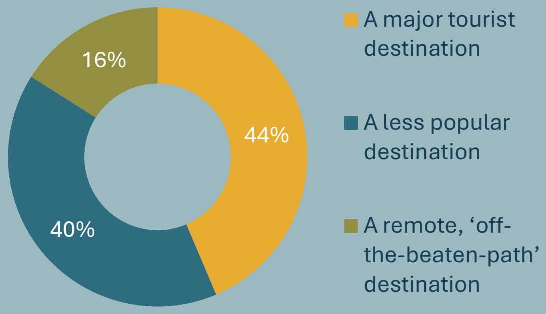
WHERE TO?



TRAVELLING WITH?



TYPE OF DESTINATION



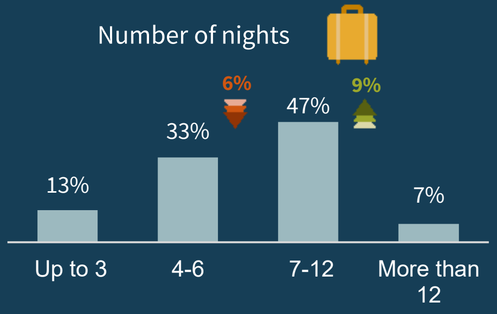
TOP SPENDING PRIORITIES

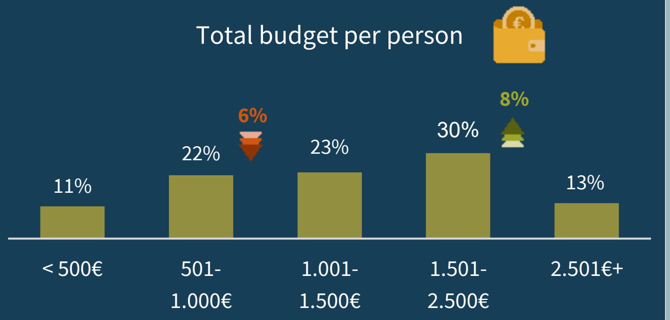
27% Accommodation

21% Activities at the destination

20% Food & Drinks

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Greece	7%
Spain	6%
Croatia	6%
Italy	5%
Germany	5%

** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 500 (total sample of respondents per country)

Spaniards' travel plans

Travel horizon: April-September 2025

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
March '25	75% 5%	11%	13%
April '24	80%	9%	11%
Mar '23	78%	9%	14%

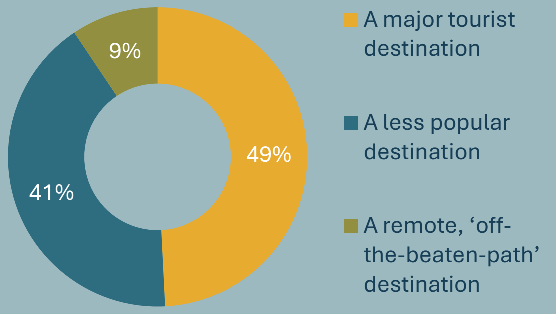
WHERE TO?

NEIGHBOURING COUNTRY	32%
NON-NEIGHBOURING COUNTRY	22% 4%
WITHIN MY COUNTRY	31% 9%
OUTSIDE EUROPE	10%

TRAVELLING WITH?

With partner	With family	Solo
36% 9%	34%	10% 3%

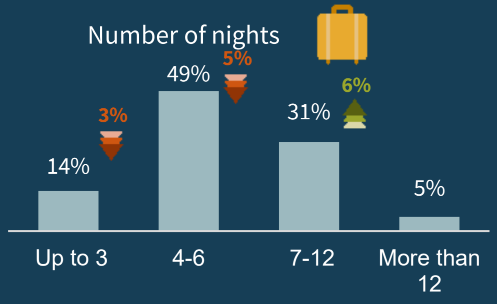
TYPE OF DESTINATION

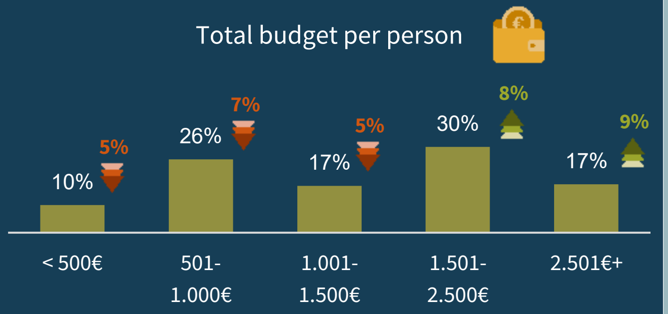


TOP SPENDING PRIORITIES

27%	Accommodation
24%	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	9% 4%
Italy	8% 9%
Portugal	7%
Germany	7%
Greece	5%

** Based on total sample, without reference to domestic trips

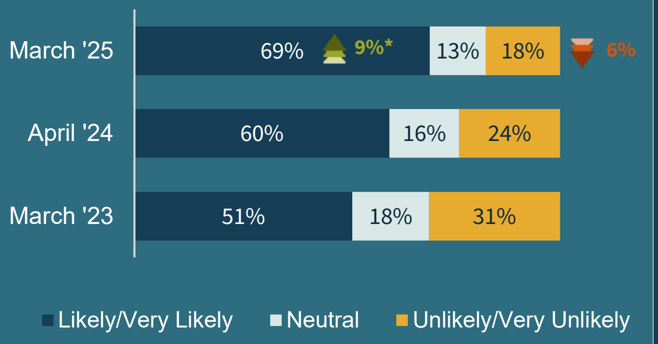
* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 500 (total sample of respondents per country)

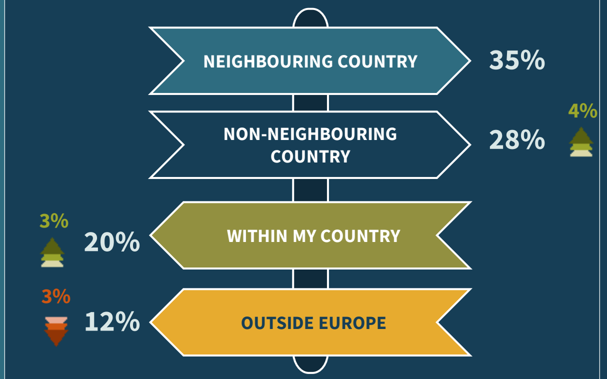
Swiss travel plans

Travel horizon: April-September 2025

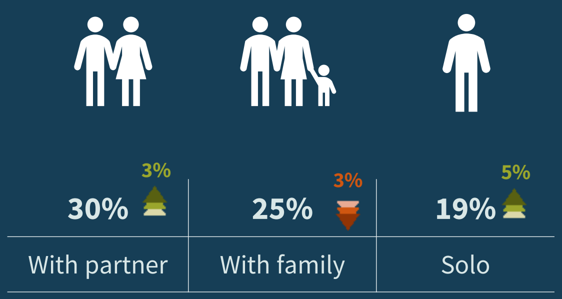
INTENTION TO TRAVEL



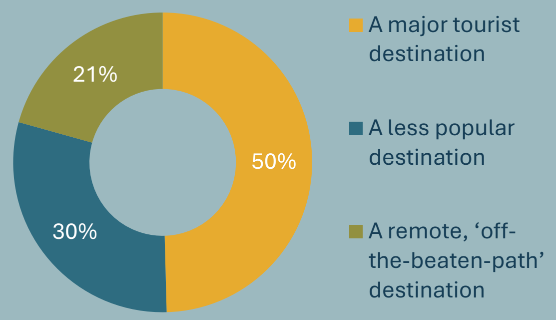
WHERE TO?



TRAVELLING WITH?



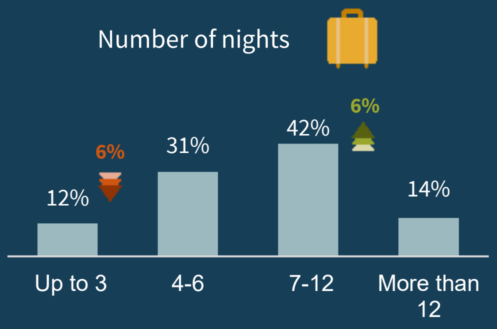
TYPE OF DESTINATION

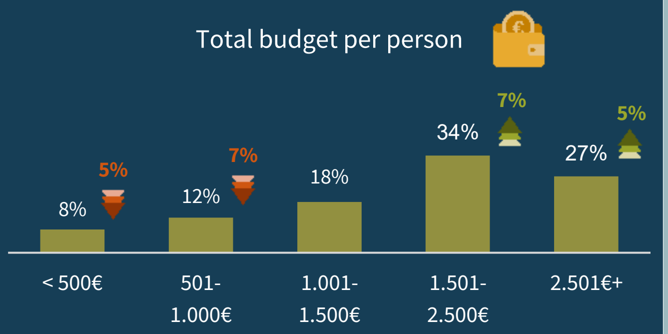


TOP SPENDING PRIORITIES

19%	Accommodation
15%	Food & Drinks
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Austria	8% ▲3%
Belgium	5%
Germany	5% ▼3%
France	5%
UK	5%

** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (September 2023)

No. of respondents: 474 (total sample of respondents per country)

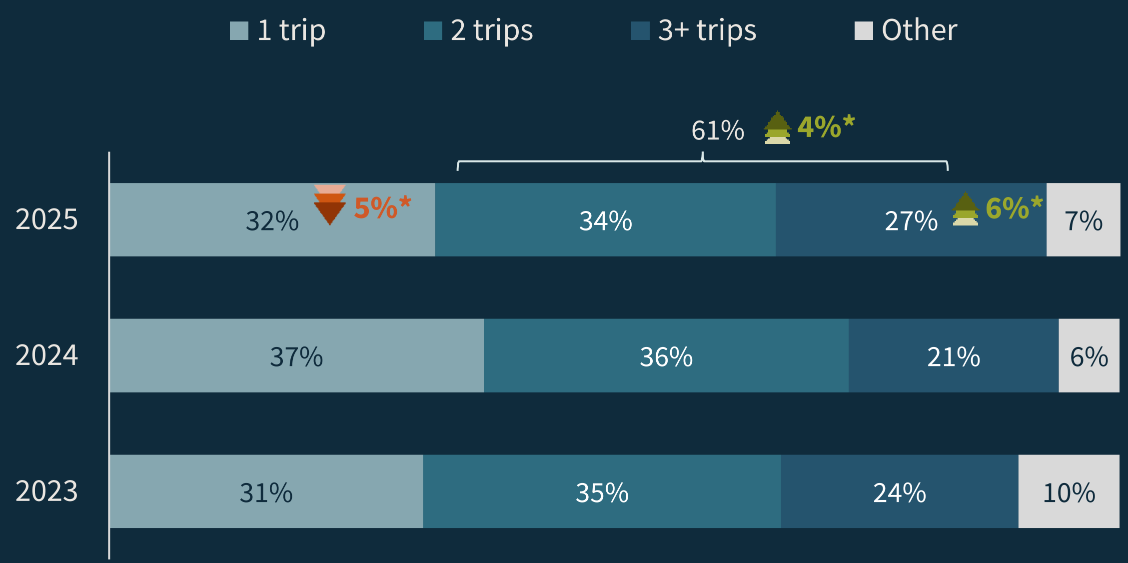
Planning the details

02

61% of Europeans plan multiple trips this spring and summer, up 4% from last year

The share of travellers taking more than 3 trips drops with age: 38% of travellers aged 18-24 plan to travel more than three times, vs. 17% of those over 55.

Number of intended trips within Europe in the next six months



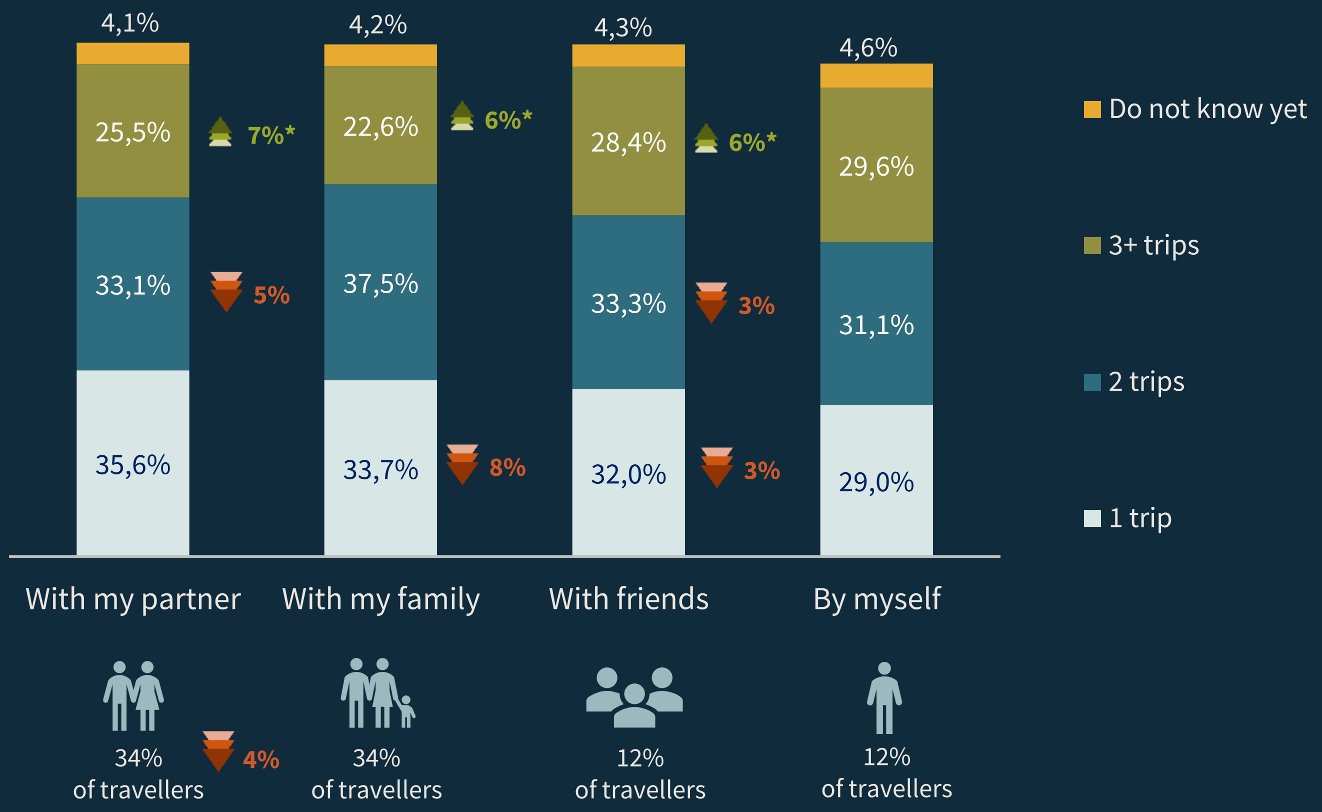
Q6. How many trips do you plan to take in the next 6 months, within Europe?

* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 4,313

Travellers going solo or with friends are the most eager to take three or more trips

Number of intended trips within Europe
by preferred travel companion

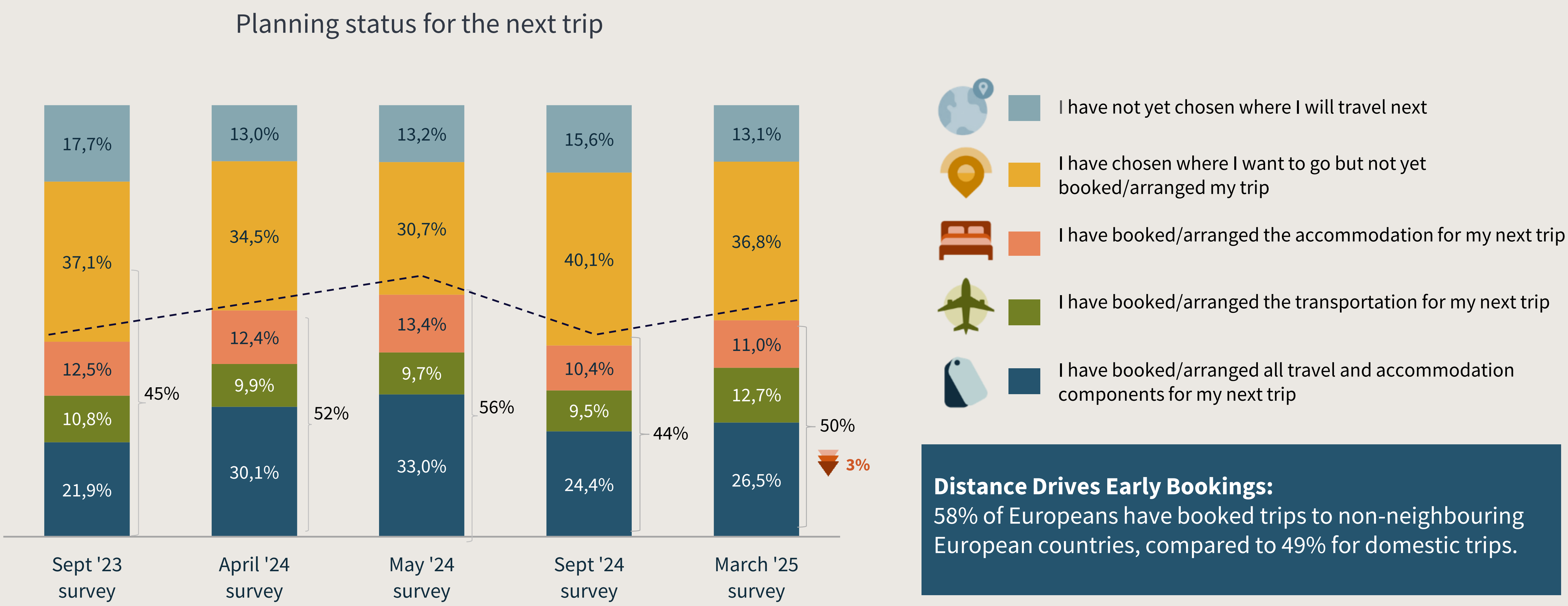


* Statistically significant difference vs a year ago (April 2024)

Q6. How many trips do you plan to take in the next 6 months, within Europe?

No. of respondents: 4,313

Half of Europeans have booked their next holiday – a seasonal uptick, though still 3% below the level seen at the same time last year



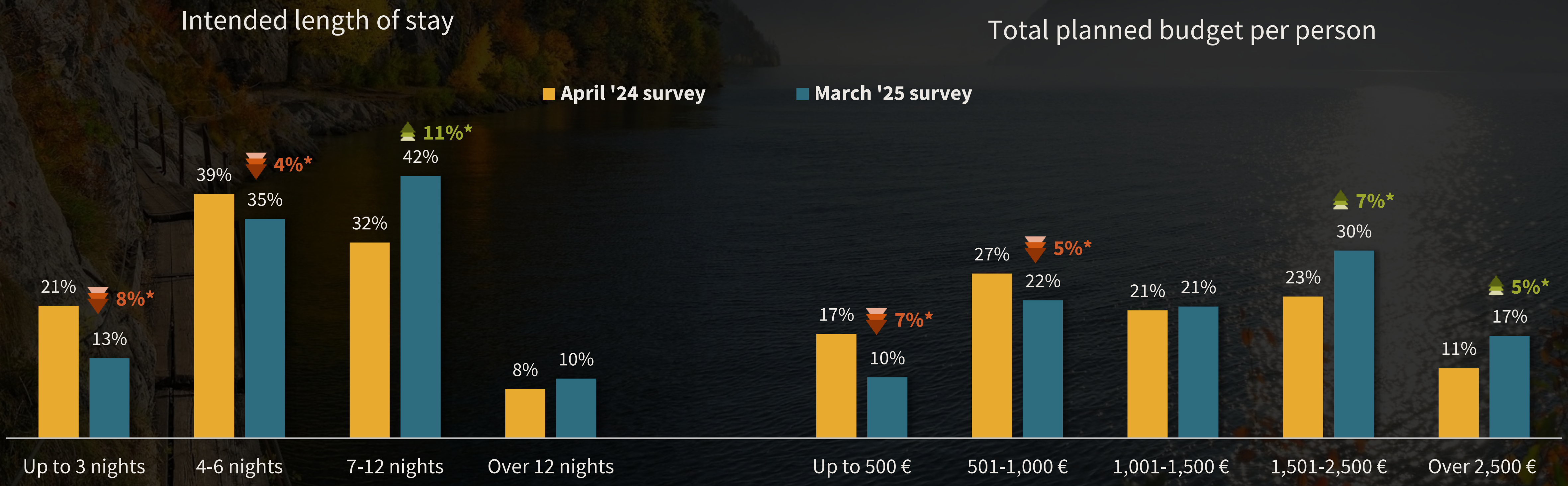
Distance Drives Early Bookings:
58% of Europeans have booked trips to non-neighbouring European countries, compared to 49% for domestic trips.

Q19. Please select a response which best describes the planning for your next trip

* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 4,313

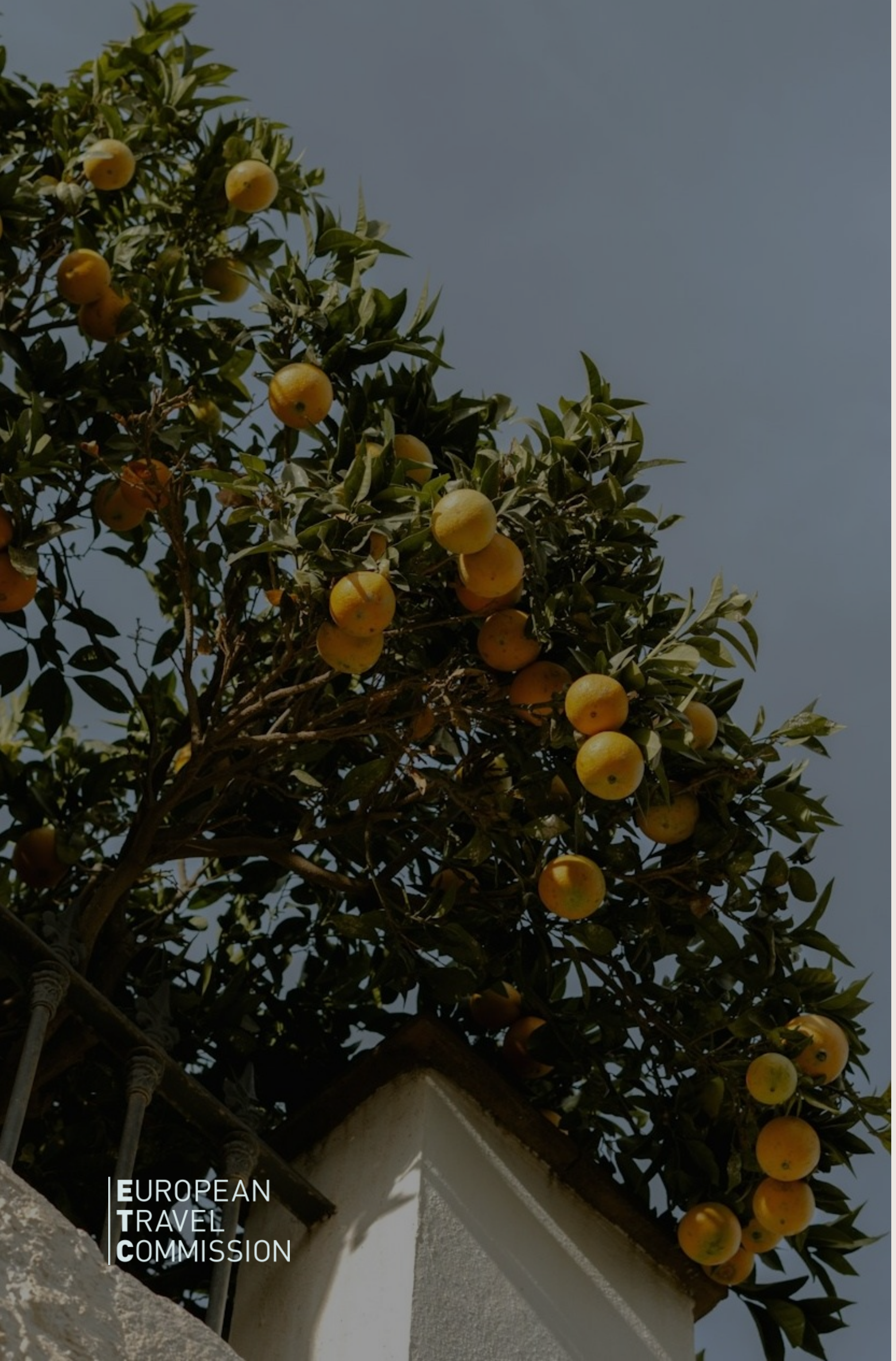
Longer stays and bigger spends: 42% of Europeans plan 7-12-night trips (+11%) and 47% will spend over €1,500 (+13%).



Q17. What would be the length of your next overnight trip?
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

* Statistically significant difference vs a year ago (April 2024)

No. of respondents: 4,313



Budget allocation by length of trip

The budget is per person, per trip, including accommodation, transportation and travel activities

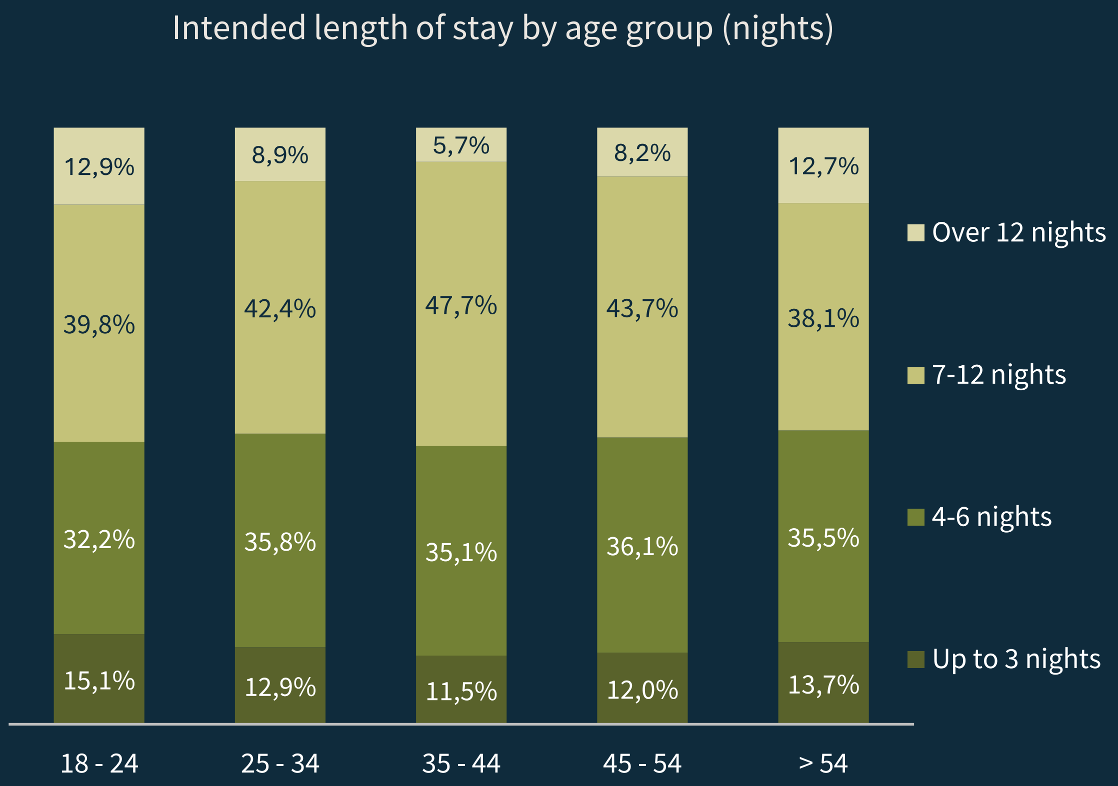
	< 3 nights	4-6 nights	7-12 nights
< 500 €	30%	9%	16%
501 - 1,000 €	38%	28%	36%
1,001 - 1,500 €	12%	26%	54%
1,501 - 2,500 €	12%	28%	73%

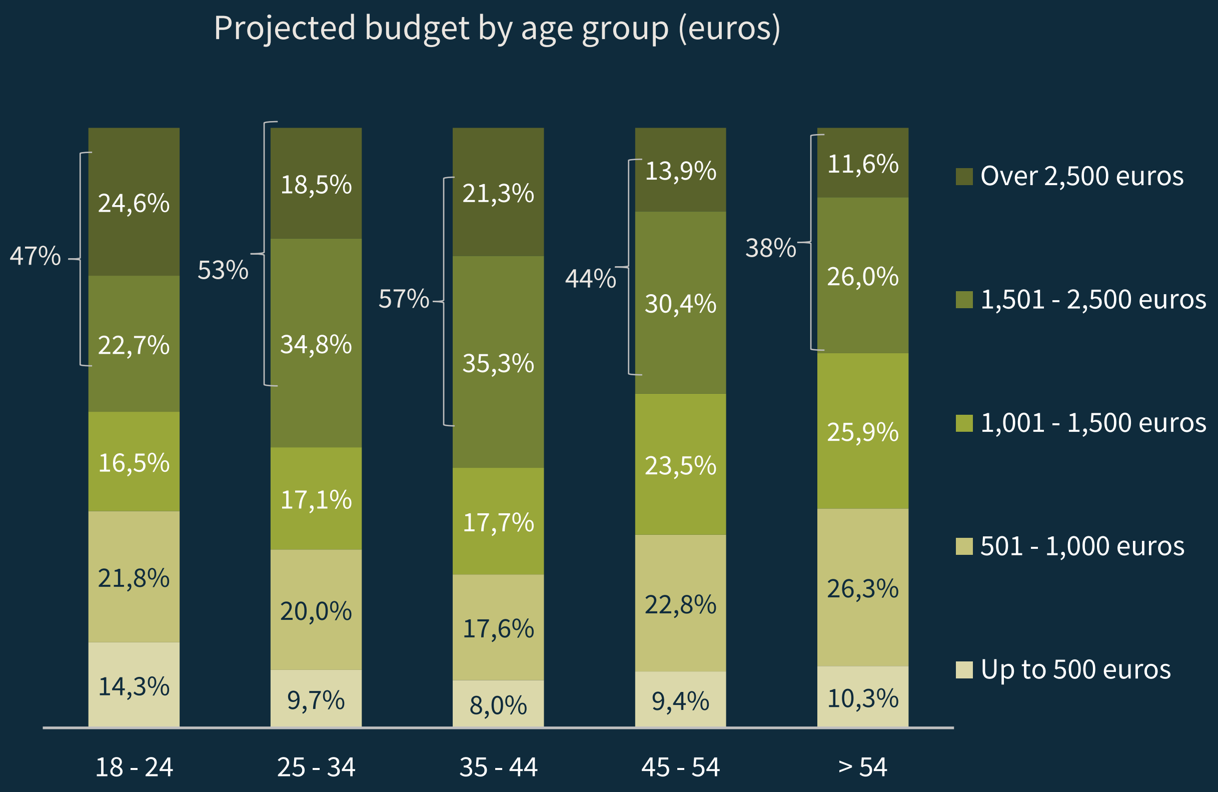
No. of respondents: 4,313

Q17. What would be the length of your next overnight trip?

Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

Among age groups, older Millennials (35–44) are most likely to take trips longer than a week and allocate higher travel budgets, exceeding €1,500





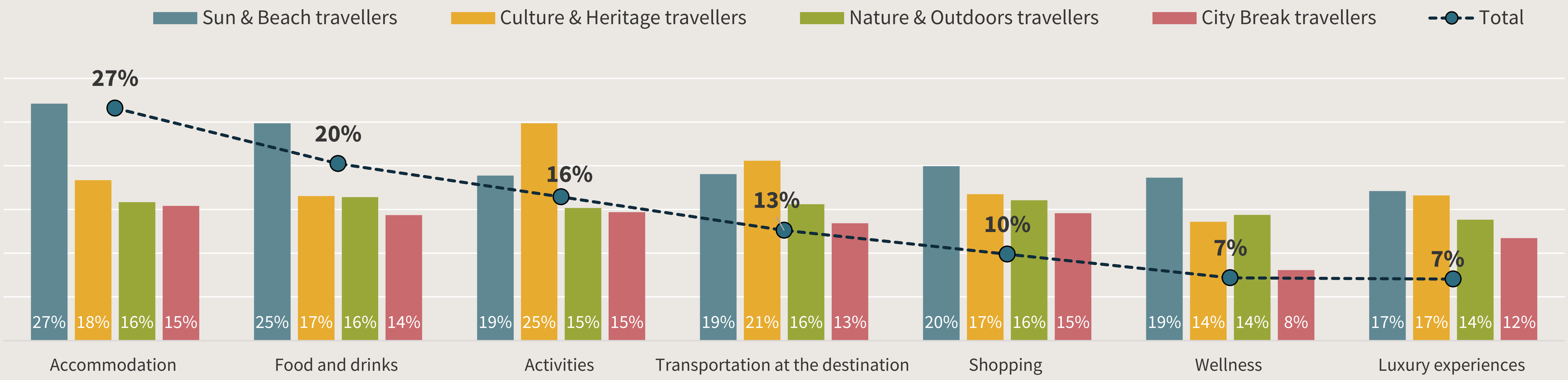
The budget is per person per trip, including accommodation, transportation and travel activities

Q17. What would be the length of your next overnight trip?
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,313

Accommodation is Europeans' biggest expense priority during holidays

Sun & Beach travellers spend more on food and drinks, while Culture & Heritage travellers spend more on activities



Spending priorities are age-defined:
Younger travellers, aged 18-24, opt to spend more than other age groups on shopping (14%) and luxury experiences (11%), while those aged 55+ plan to invest on food & drinks (24%) and accommodation (33%)

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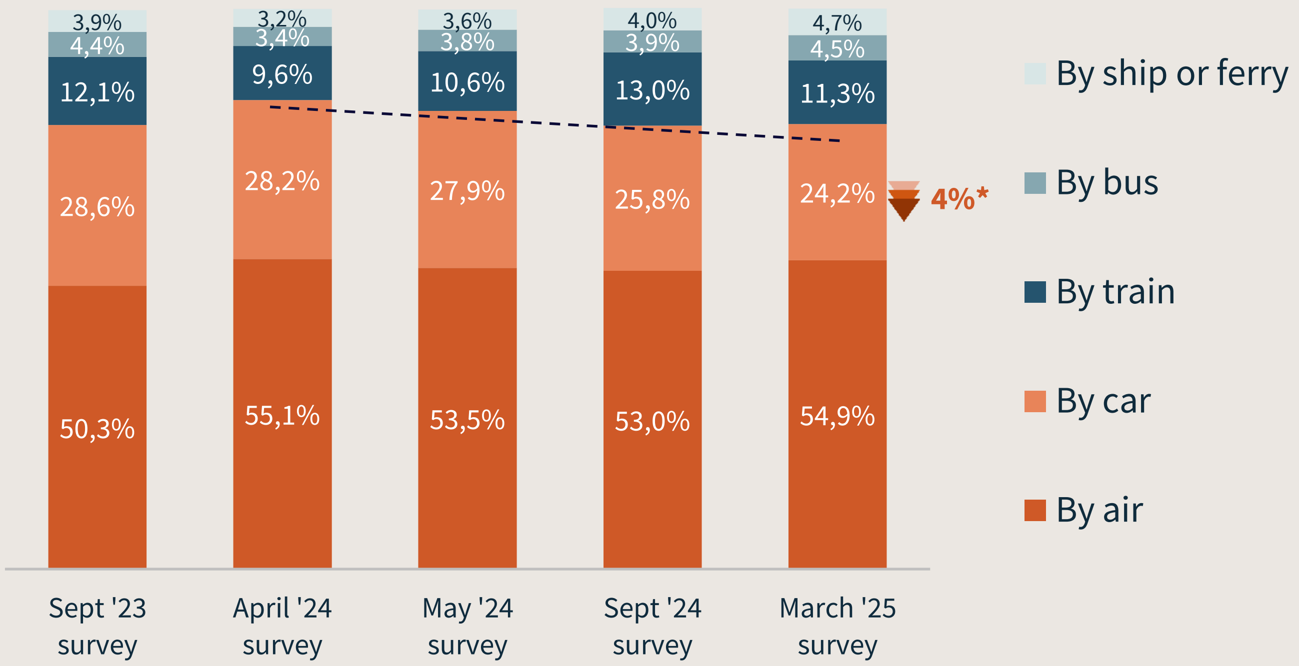
Q21. For your next trip to Europe, which of the following categories do you expect to spend the most on?

No. of respondents: 4,313

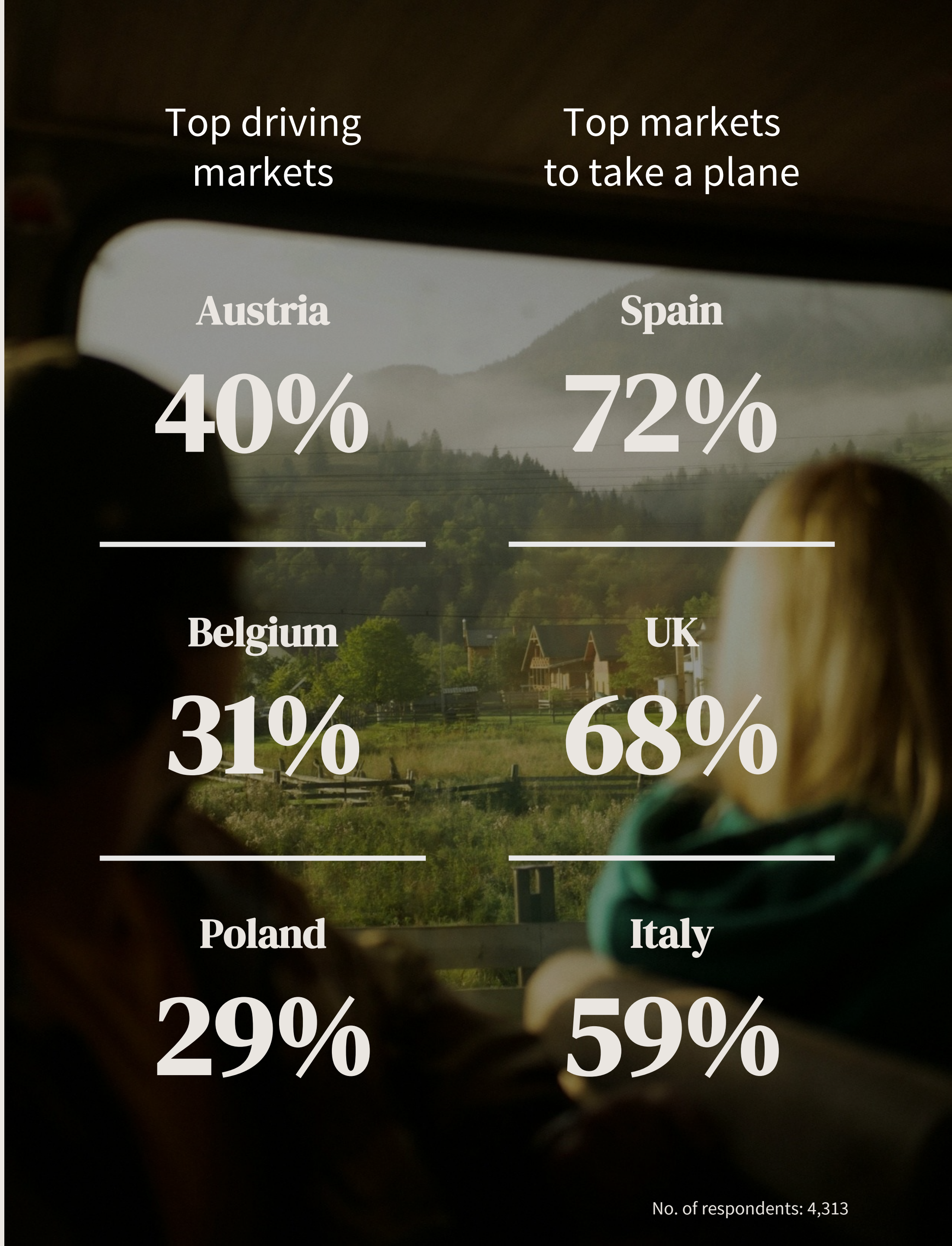
Preferences for air travel remain sky-high, while car travel drops for the 4th consecutive wave (-4%)

Preferred modes of transport for intra-European travel



Q13. Which of the following modes of transport would you most consider using during your next trip within Europe?

Statistically significant difference vs a year ago (April 2024)

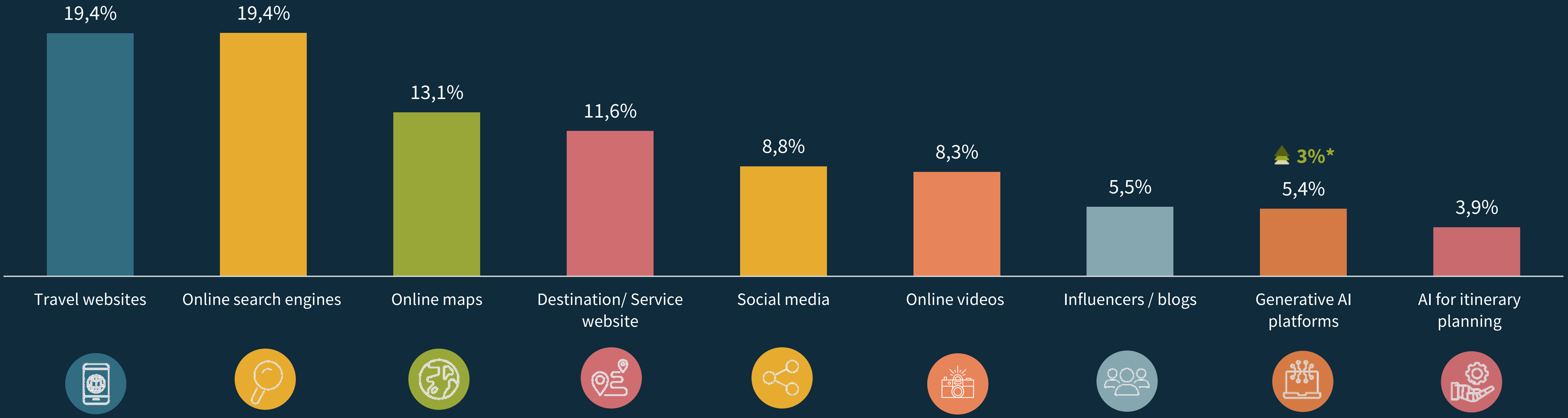


No. of respondents: 4,313

Europeans' digital trip planning starts with travel websites and search engines, but also includes generative AI (+3%)

Preferred digital tools for planning the next trip

Europeans preparing for Culture & Heritage trips are more likely to use AI for trip planning (18%) than those organising other types of holidays (10%)



Q20. Which digital tools have you used (or will use) to plan your trip within Europe in the next 6 months?

Statistically significant difference vs a year ago (April 2024)

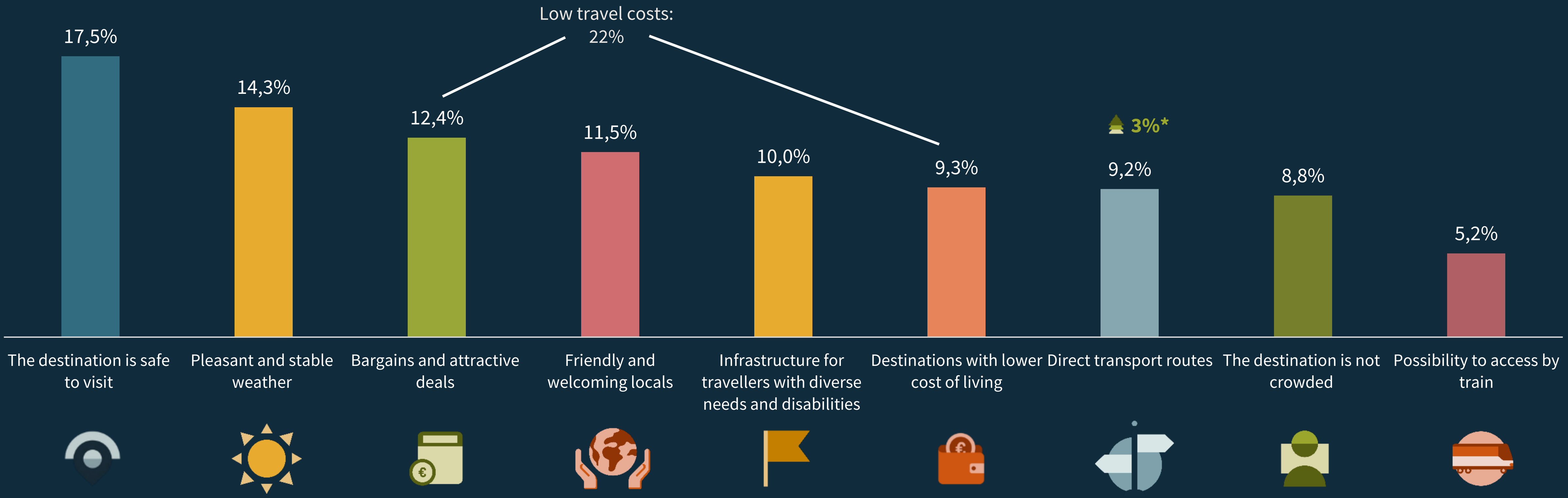
No. of respondents: 4,313

Travel considerations

03

Affordable costs and safety combined with pleasant and stable weather drive Europeans' destination choice

Europeans' top criteria in choosing a travel destination



* Statistically significant difference vs a year ago (April 2024)

Q4 What criteria will play the most important role in choosing your next holiday destination?

No. of respondents: 5,974

What do European travellers worry about?

Inflation and economic concerns remain the biggest worries, though less pronounced than a year ago, followed by geopolitical tensions and extreme weather

16.6% 6%*
Rise in the overall cost of my trip due to inflation

14% 3%*
Economic situation and personal finances

13.5%
The ongoing conflict between Russia and Ukraine

8.7%
Potential impact on travel safety due to tensions in the Middle East

8.6%
Too many visitors at the destinations I want to visit

8.6%
Extreme weather events

7.3%
Disruptions in transport options due to strikes or under-staffing

6.1%
Booking and cancellation policies (refunds, etc.)

5.3%
The environmental footprint of my travel

4.8%
Demonstrations and protests against tourism

4.5%
Limited accessibility for travellers with specific needs

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* Statistically significant difference vs a year ago (April 2024)

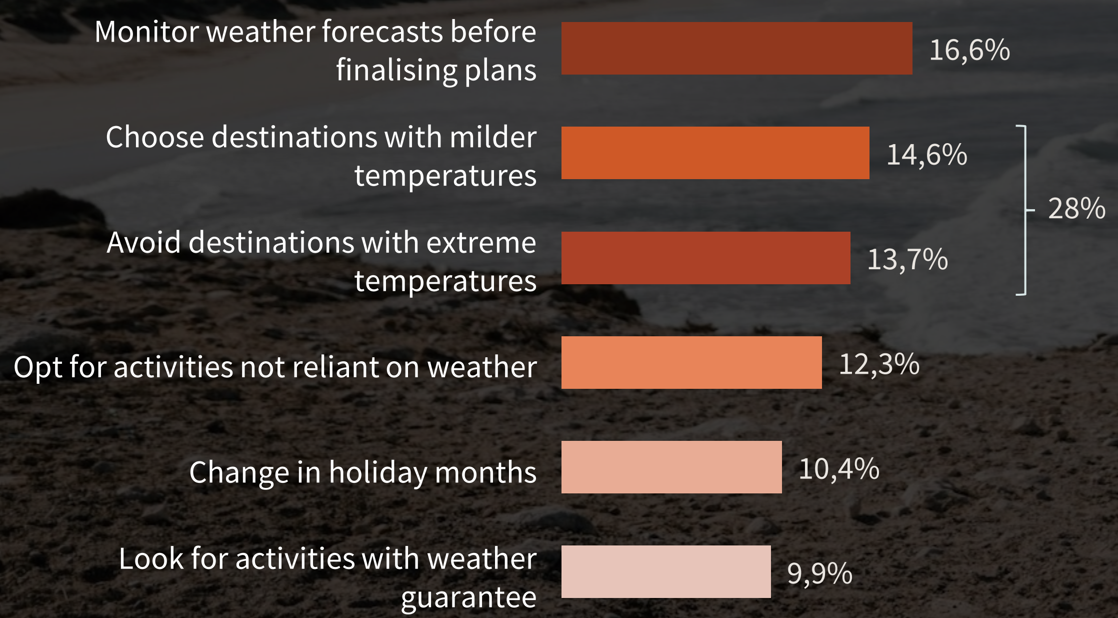
Q3. What currently concerns you the most about travelling within Europe?

No. of respondents: 5,974

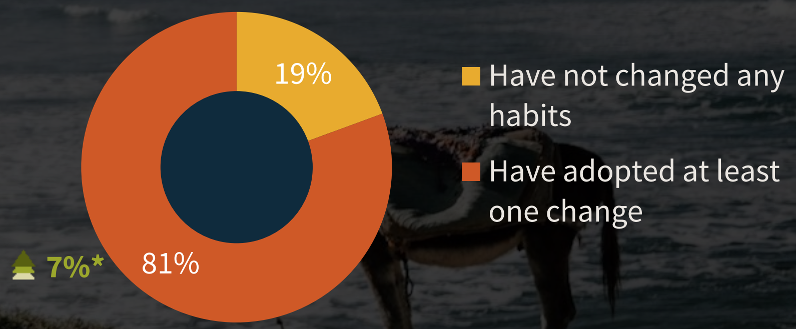
Travel in the era of climate change

28% of Europeans choose destinations where the weather is milder and extreme temperatures are less likely

Most popular changes of habits due to climate change



Europeans who changed their behaviours due to climate change



Heat waves are set to change beach holidays:
18% of Europeans planning Sun & Beach holidays have chosen different travel periods than the previous years, compared to an average of 10% among those planning other types of trips.

Q22. How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) have been influencing your travel habits?

No. of respondents: 5,974

Responsible travel behaviours panel

Europeans adopt more sustainable ways to travel by choosing second-tier destinations, longer stays, and, to a lesser extent, train travel

48%	Of Europeans intend to visit less touristy and off-the-beaten-path destinations
40%	Plan to stay at their next destination(s) for 7 nights or longer
11%	Opt to travel by train to their next destination
9%	Prefer choosing destinations that are not overcrowded with tourists
5%	Worry about the environmental footprint of their trip

EUROPEAN TRAVEL COMMISSION

Methodology

Methodology

- The report is the result of online market research of Europeans who took at least two overnight trips during the last three years (2023-2024/25)
- Distribution/data collection period:
    - **Wave 17**: 11 -26 September 2023; sample = 5,993 / **Wave 18**: 2-17 April 2024; sample = 5,859 / **Wave 19**: 25 May-7 June 2024; sample = 5,955 / **Wave 20**: 07-23 September 2024, sample = 6,001 / **Wave 21**: 3-17 March 2025; sample = 5,974
    - **Countries**: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
    - **Languages**: English, French, German, Italian, Spanish, Polish and Dutch
- **Research themes examined**: travel concerns and impact of external shocks on travel (eight questions), and travel intentions, preferences and trip planning (fourteen questions)
- 54% of the Wave 21 survey respondents are male, and 46% are female. Sample size and age groups are listed below:

Age	Country										Total
	UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
18 - 24	88	70	44	56	97	92	56	54	52	54	**663**
25 - 34	136	112	73	84	128	152	106	118	139	103	**1,151**
35 - 44	126	134	103	99	143	150	120	107	112	164	**1,258**
45 - 54	138	168	105	93	137	168	92	110	87	76	**1,174**
≥55	262	266	175	168	245	188	126	111	84	103	**1,728**
Total	**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**474**	**500**	**5,974**

- **European regions:**
    - Southern/Mediterranean Europe: France, Croatia, Cyprus, Greece, Italy, Malta, Monaco, Montenegro, Portugal, San -Marino, Slovenia, Spain, Türkiye.
    - Western Europe: Austria, Belgium, Germany, Luxembourg, Netherlands, Switzerland
    - Northern Europe: Denmark, Finland, Iceland, Ireland, Norway, Sweden, the UK
    - Central Europe: Czech Republic, Hungary, Poland, Slovakia
    - Eastern Europe: Bulgaria, Estonia, Latvia, Lithuania, Romania, Serbia, Ukraine

Albania, Bosnia-Herzegovina, North Macedonia, Belarus and Moldova are excluded from the regional analysis for comparability reasons since they were introduced in 2024

Study on Monitoring Sentiment for Intra-European Travel

Data sources: This report is based on research conducted by MINDHAUS (www.mindhaus.gr) and should be interpreted by users according to their needs.

Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to eliminate every margin of error.

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