

## Press Release

# European Travel Maintains Momentum in Early 2025 Despite Rising Global Uncertainty

- International tourist arrivals to Europe rose 4.9% in Q1 2025 compared to the same period last year.
- Value-for-money and off-peak travel trends continue to drive demand amid increasing economic pressures.
- New US tariffs expected to pose challenges for transatlantic travel and global tourism performance.

**Brussels, 7 May 2025:** European tourism maintained strong momentum into early 2025, demonstrating remarkable resilience despite a backdrop of economic uncertainty and geopolitical tensions. The latest "European Tourism: Trends & Prospects" report for Q1 from the European Travel Commission (ETC) shows that international tourist arrivals increased by 4.9% in the first quarter of 2025 compared to the same period in 2024, with nights up 2.2%.

Following a robust 2024 — when arrivals exceeded pre-pandemic levels by 6.2% and nights by 6.4% — the sector has continued to capitalise on shifting traveller behaviours. Demand for value-for-money destinations and off-peak travel remains strong, reflecting ongoing price sensitivity among travellers. While performance so far in 2025 has been stable, the economic outlook has become more uncertain. Rising prices, persistent geopolitical tensions, and the introduction of new US tariffs are expected to influence traveller sentiment and spending habits as the year progresses.

Looking at travel expenditure, the latest estimate for 2025 suggests that travellers are expected to spend around 14% more across Europe than in 2024. With spending growth projected to outpace the increase in arrivals, this may reflect a higher average spend per visit.

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

*Europe's tourism sector continues to show extraordinary resilience, and the latest data highlights how European tourism is responding to shifting traveller priorities. We are seeing strong interest in value-for-money destinations and a growing demand for travel outside the traditional peak season. These trends reflect cost-consciousness, but also a broader desire for more balanced and authentic travel experiences. As uncertainty grows globally, Europe's ability to offer diversity, connectivity, and dependable quality puts the region in a strong position to remain a preferred destination worldwide.*

## Winter destinations boost early-year performance

Winter tourism hubs performed strongly in early 2025, with year-on-year increases in arrivals to destinations such as Slovakia (+14.3%) and Norway (+13.2%). Notably, Norway has also attracted some longer stays over the winter season — overnights were 15.3% above 2024 and over a third higher than in 2019.

Italy's reputation as a value-for-money ski destination may have also helped sustain momentum during the winter months, seeing a greater increase in overnights (+8%) compared to some other alpine markets, including Austria (-3.5%) and Switzerland (+4.5%).

## Eastern Europe rebounds amid improved confidence and connectivity

Central and Eastern European destinations continued their recovery from the slower performance of recent years. Destination countries which have seen prolonged recovery due to their perceived proximity to the war in Ukraine, such as Poland (+16.2%), Latvia (+27.8%), and Hungary (+18.2%), have demonstrated a rebound in arrivals on Q1 2024, albeit from a more subdued level.

Romania (+11.7%) and Bulgaria (+1.4%) also benefited from their accession to the Schengen Area in January, which has begun to facilitate smoother cross-border movement and renewed visitor interest.

## Mediterranean destinations thrive on off-season demand

Southern Europe remained a major draw in Q1, as demand for warmer winter temperatures from some Northern and Western European source markets supported travel activity across the Mediterranean and Southern Europe. Spain welcomed over 10 million foreign arrivals in just two months – up nearly 2 million compared to 2019. Other Mediterranean destinations saw strong year-on-year growth in arrivals, including Cyprus (+15.4%) and Malta (+12.6%), albeit on a small base. This trend has been supported by rising interest in travel outside peak summer months and increased air capacity for Malta.

This might reflect the trend of 'cool-cations', as travellers increasingly seek to avoid the warmest months. At the same time, it highlights how destinations successfully diversify their tourism offerings to strengthen the industry during off-peak periods.

## Value for money a key consideration

As costs for tourism-related services remain well above pre-pandemic levels, travellers are placing greater emphasis on affordability. Most categories have recorded notable year-on-year price increases since the same period in 2024. In particular, domestic and international package holidays have seen the steepest rises, up 12% and 10% respectively compared to last year. This potentially supports shorter stays, alongside greater demand for more affordable destinations.

With value-for-money considerations shaping destination choices, some countries like Romania have benefited, with an increase in arrivals. Meanwhile, destinations perceived as more expensive, including Iceland (-5.7%) and Monaco (0.8%) have stagnated or declined compared to the same period in 2024.

## Uncertain transatlantic outlook as new US tariffs may cloud demand

Newly announced US trade tariffs have added heightened uncertainty to transatlantic travel, with Europe bracing for a potential dip in American visitors this year. Although Europe remains a leading long-haul destination, fluctuations in the Euro/US Dollar exchange rate and rising travel costs may soften US demand. This decline matters as the US accounted for 9% of global travel pre-pandemic, and last year, Americans made up over a third of Europe's long-haul arrivals.

Despite these headwinds, US travel to Europe continues to perform well in early 2025, with over 80% of reporting destinations recording year-on-year growth in Q1.

---

Some offsetting effects may also emerge, including a shift away from travel to the US — particularly from China — and an increase in short-haul travel within Europe, as more travellers choose to stay within the region amid economic and geopolitical uncertainty.

**The full summary report can be downloaded from: <https://etc-corporate.org/reports/european-tourism-2025-trends-prospects-q1-2025/>**

**ENDS**

## Note to editors

---

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).

## Media contact

---

Amelia Conwell  
Penta Group  
[etc@pentagroup.co](mailto:etc@pentagroup.co)  
Ph: +32 (0)492 46 39 03

---

### European Travel Commission

Rue du Marché aux Herbes  
61, 1000 - Brussels, Belgium  
Tel: +32 2548 90 00  
[www.etc-corporate.org](http://www.etc-corporate.org)

**EUROPEAN  
TRAVEL  
COMMISSION**