

Press Release

Overseas Travel Intentions to Europe Soften for Summer 2025 Amid Global Tensions and Rising Costs

- The share of travellers planning a trip to Europe this summer has dipped from 41% in 2024 to 39% in 2025, reflecting a drop in enthusiasm across key long-haul markets such as the US, Brazil, Canada, and Japan.
- In sharp contrast, China's interest in Europe climbs to 72%, amid economic revival and shifting spending habits.
- High travel costs remain the top barrier across all analysed markets, cited by nearly half of those not planning a European trip.
- However, interest in earlier summer travel is rising, and travellers are shifting to mid-range daily budgets with food, activities, and shopping as key spending priorities.

Brussels, 10 June 2025: The latest edition of the Long-Haul Travel Barometer (LHTB 2/2025), published by the European Travel Commission (ETC) and Eurail BV, reveals a drop in long-haul travel sentiment to Europe for the summer season 2025. While global tourism continues to show resilience, growing cost concerns, geopolitical instability, and weakening consumer confidence are influencing consumer decisions across key markets.

The latest survey finds 57% of respondents across major long-haul source markets plan to travel overseas between May and August 2025, a 1% decline compared to the same period last year. The intention to **visit Europe** specifically has dropped from 41% in 2024 to 39% this year, with sentiment softening most notably in the United States (-7%), Brazil (-6%), Canada (-5%), and Japan (-5%). However, **China** remains a standout. Driven by economic recovery and a shift in consumer values, 72% of Chinese respondents now say they plan to visit Europe this summer, a remarkable 10% increase year-on-year.

Affordability concerns weaken travel intention

The perception of **high costs** remains the most cited barrier to travel to Europe, mentioned by almost half of respondents not planning a trip to the region. This marks a significant 7% increase from last summer, reflecting growing price sensitivity amid inflation and exchange rate shifts.

Among US and Brazilian respondents, where economic uncertainties and cost sensitivities are more acute, over half cite travel costs as the primary deterrent. **Limited vacation time** and preference for **domestic holidays** also remain important factors, especially in Japan, South Korea, and Australia.

On a more reassuring note, concerns about the **Russo-Ukrainian War** have significantly declined — only 4% of respondents cited it as a barrier to European travel this summer.

Mixed sentiment across regions

Travel sentiment towards Europe is diverging across key long-haul markets. In the **United States**, 33% of respondents plan to visit Europe this summer. This represents a 7% decline from 2024, with rising costs and political concerns, including unease over how the US is perceived abroad, dampening enthusiasm. Brazilian interest has also declined compared to last year (-6%), yet 45% of respondents still intend to travel to Europe, with younger and higher-income travellers remaining the most enthusiastic.

In **Canada**, sentiment is rebounding from the lower levels seen earlier this year but remains below summer 2024. Currently 37% of Canadian respondents are planning a European trip, down 5% from last year, as travel costs and geopolitical tensions continue to influence decision-making. **Japanese** respondents show the lowest interest in visiting Europe among all surveyed markets, with only 13% planning to visit Europe, down 5% from last year. This reflects the ongoing impact of a weak yen and subdued consumer confidence.

In **South Korea**, overall long-haul travel sentiment remains stable. Only 30% of respondents are considering Europe, with preferences centred on France, Spain and Italy. Alongside China, **Australia** stands out as the only other market registering a clear increase in travel intent, with 40% of respondents now planning to travel to Europe, a 3% rise compared to last summer.

Earlier departures and shifting budgets

More travellers are choosing to travel earlier in the summer season this year. While **July and August** remain peak months for 46% of respondents, interest in **May and June** has grown from 24% in 2024 to 34% in 2025. **Spending patterns** are also shifting: the share of respondents planning to spend over €200 per day has dropped by 11%, while those expecting to spend €100–€200 per day has risen to 40%.

Across all markets, dining remains the top **budget priority** (65%), followed by tourist activities and shopping. Transport budgets (41%) are also significant, likely reflecting the high number of multi-destination trips being planned — a trend that continues to define the appeal of European travel.

Miguel Sanz, President of the European Travel Commission, commented:

At a time of declining consumer confidence globally, it is more important than ever to strengthen Europe's position as a top destination. This means improving the competitiveness and accessibility of European experiences while continuing to showcase lesser-known destinations and off-season travel. With the right strategic focus, Europe can continue to deliver meaningful, high-quality tourism for visitors and residents alike.

The full summary report can be downloaded from: <https://etc-corporate.org/reports/long-haul-travel-barometer-2-2025/>

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Note to editors

The **Long-Haul Travel Barometer** provides forward-looking information about short-term travel trends among potential travellers from Australia, Brazil, China, Canada, Japan, South Korea and the US. The analysis sheds light on travellers' preferences, motivations and barriers related to travelling to and within Europe. Results are based on 1,000 interviews conducted in the five markets every four months. The Long-Haul Travel Barometer is a joint project of the [European Travel Commission \(ETC\)](#) and [Eurail B.V.](#)

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.

Eurail BV is an organisation dedicated to the management of Eurail and Interrail Passes. Eurail gives travellers from all over the world the opportunity to experience flexible, borderless travel across Europe. Eurail BV has over 100 travel partners across Europe, including accommodation providers, transport operators and attractions, offering additional special benefits to all Pass holders. The company is owned by over 35 European railway and shipping companies. For more information, visit www.eurail.com and follow [@Eurail](#).

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