
Press Release

European Tourism Holds Steady in Q2 2025, Driven by Resilient Consumer Demand and Global Interest

- Europe's tourism sector showed a steady but more moderate performance in Q2 2025, with arrivals up 3.3% and nights down 0.7% year-on-year.
- Off-season demand for sun and beach holidays is rising, likely driven by the shift in Easter holidays and evolving travel preferences.
- European destinations experienced renewed interest from China, alongside continued strong arrivals from the US.

Brussels, 3 July 2025: Europe's tourism sector maintained a solid performance in Q2 2025, highlighting its resilience amid ongoing economic pressures and geopolitical uncertainty. According to the European Travel Commission's latest report, "**European Tourism: Trends & Prospects**", international **tourist arrivals** rose moderately by 3.3% compared to the same period in 2024. Meanwhile, **nights spent** fell slightly by 0.7% — a decline likely driven by calendar effects, including the shift of Easter to late April and changes to school holiday schedules, rather than a drop in demand.

Elevated travel-related prices are likely to weigh on consumers' willingness to spend, but research also shows that overall **travel expenditure** is expected to be 13% higher in 2025 than in 2024. As more travellers are looking for **value for money**, lesser-known destinations with competitive prices might benefit, reducing overcrowding pressure in tourist hotspots.

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

The past months have brought new challenges to the tourism sector — rising economic pressures, shifting geopolitics, and growing concerns over unbalanced tourism in some tourism hotspots. Yet Europe's destinations continue to show remarkable resilience. To sustain this momentum, we must double down on innovation and invest in more sustainable, inclusive models of tourism that respond to locals' needs and visitors' expectations.

Sun and beach holidays drive off-season demand

Searches for **spring getaways** increased by 36% year-on-year among European travellers¹, indicating growing demand for **off-season travel**, with most seeking sun and beach destinations. While the shift of Easter to late April

¹ ForwardKeys, [link](#)

contributed to this rise, the trend also reflects **changing traveller preferences** — particularly the desire to avoid peak heat and overcrowding during the summer months. Malta saw a 19% increase in arrivals, supported by enhanced connectivity, while Cyprus posted a 16% rise, driven by its favourable location and year-round appeal — both destinations growing from a lower base. Larger summer destinations such as Spain (+7%) and Portugal (+3%) also benefited from this trend.

Central Eastern European destinations, including Latvia (+16%), Lithuania (+15%), and Hungary (+14%), also noted strong year-on-year increases in arrivals, likely due to increased connectivity. This demonstrates a continued path to recovery from the pandemic and the impacts of the Russo-Ukrainian war.

Price sensitivities among travellers, but spending on the rise

Costs for many **tourism-related services** have risen from last year, with further increases likely during the summer months of July and August, which may impact travellers' destination choice this summer. As the high season in the Southern/Mediterranean region approaches, the price of international flights to the area has risen 5% in the first four months of 2025 year-on-year, while the cost of international package holidays is up 7%.

At the same time, Southern European destinations — including Spain, Cyprus, and Malta — reported substantial increases in **tourism revenue** in the first months of 2025. This suggests that travellers are spending more during off-peak travel months. Overall, tourist spending across Europe is expected to rise by approximately 13% compared to 2024, with growth outpacing arrivals and indicating a higher average spend per trip.

Long-haul travel shows resilience, despite global uncertainty

Travel from the US to Europe remains higher than in 2024 across most reporting destinations, despite concerns about **transatlantic demand**. Year-on-year growth in overnight stays is particularly notable in the Nordics, with nights up 35% in Norway and 24% in Denmark. Southern European destinations have also seen solid gains in US arrivals, including Croatia (+18%), Montenegro (+17%), and Greece (+16%).

Moreover, the economic uncertainty has likely contributed to reduced airfares on several routes — including those between the US and Spain, Italy, and the UK — which may support continued growth in American travel to Europe this summer.

Travel from China is showing stronger signs of recovery in 2025, with all reporting destinations recording increases in nights or arrivals compared to the same period in 2024. Demand for smaller destinations such as Croatia (+7%), Estonia (+15%), and Romania (+20%) has picked up in Q2, while recovery for larger destinations remains ongoing and is expected to improve further with enhanced air connectivity from Chinese cities to Paris and Madrid.

The return of Chinese visitors to Europe is expected to continue, supported by rising incomes, better flight connectivity, and favourable travel policies. This trend may also be reinforced by a reluctance among Chinese travellers to visit the US in 2025, due to geopolitical tensions, increased visa scrutiny, and broader security concerns.

The full summary report can be downloaded from: <https://etc-corporate.org/reports/european-tourism-2025-trends-prospects-q2-2025/>

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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.

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