Long-Haul Travel Barometer 3/2025

Travel horizon:
September-December 2025

eurail

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Contents

Long-Haul Travel Barometer 3/2025

Methodology

Target

Travel population in Australia, Brazil, Canada, China, Japan, South Korea and the US.

Data collection period

- 4-17 August 2025
- Travel horizon: September-December 2025

Frequency

Interviews are conducted 3 times per year and provide insights into the travel horizons: January-December, January-April, May-August and September-December.

Analysed samples

- Total respondents: 7,121
- Respondents likely to travel long-haul to Europe: 2,808
- Respondents likely to travel long-haul but not to Europe: 1,151
- Respondents not likely to travel long-haul: 3,162

Method

1,000 online interviews with national representatives (18-70 years old), per market, per wave.

Significant changes

Statistically significant changes, measured as year-on-year differences in percentage points, are indicated by the following symbols:

Increase ▲ Decrease ▼

The survey is meant to gauge travellers' attitudes and intentions and not to quantify demand levels.

Travel intentions and barriers

Travel horizon:
September-December 2025

Sample size
per market 1,000

01

Europe holds steady amid shifting sentiment

- While economic headwinds and high travel costs are dampening demand in several markets, there is also clear evidence of resilient and evolving travel behaviour, with younger generations and value-seekers playing an increasingly decisive role in shaping Europe's appeal this autumn.
- Across all surveyed markets, 55% of respondents plan to travel overseas between September and December 2025, reflecting a four-point drop compared to the same period last year. At the same time, the share of travellers unwilling to travel long-haul has risen, particularly in China, Brazil, and Canada, signalling a growing caution.
- Intentions to visit Europe remain broadly stable compared to last year, but market-level differences tell a more complex story. Interest is holding steady or even rising in the US and South Korea. By contrast, enthusiasm among Chinese travellers—historically Europe's most eager long-haul market—has softened significantly, down 14 points year-on-year, although their interest still surpasses all other markets. Japanese travellers remain the most reluctant, despite a modest rebound.

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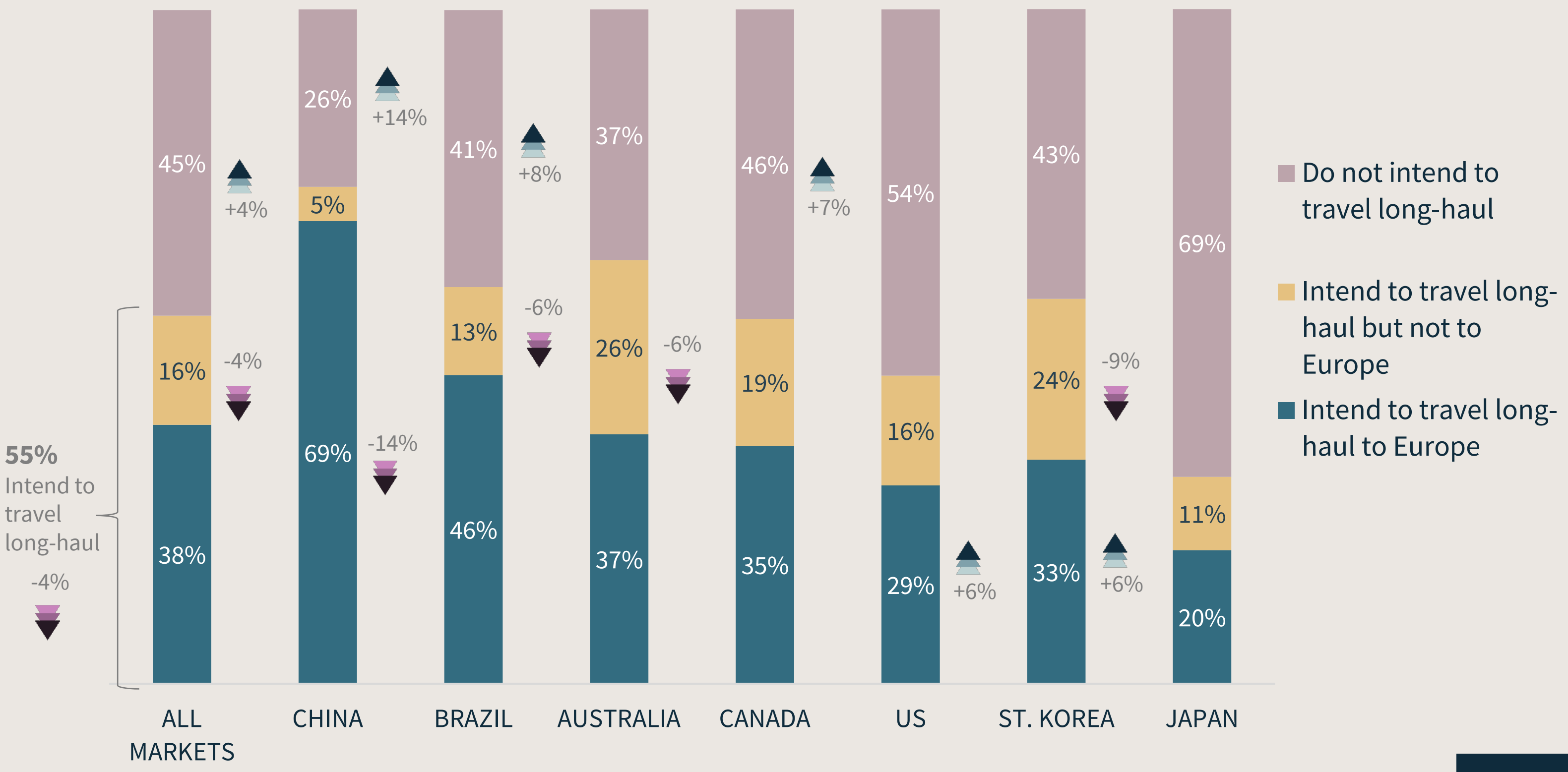
Intentions for long-haul travel in autumn 2025

Horizon: September-December



Evolution of travel intention to Europe in selected markets

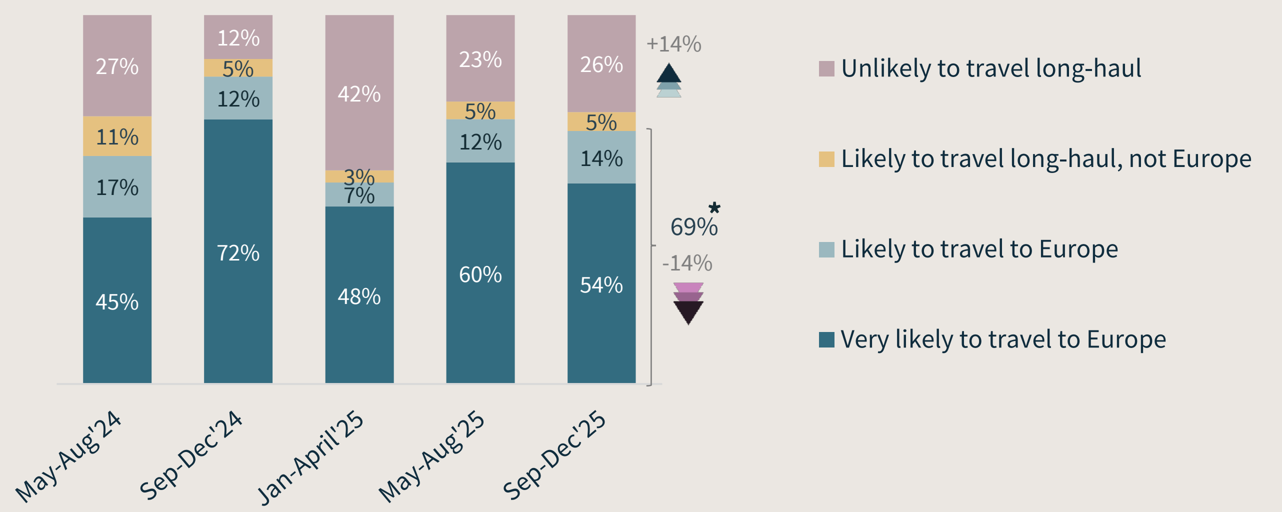
Europe remains key, but interest in travelling closer to home gains ground for Chinese travellers

Chinese enthusiasm for European travel remains unmatched, with 69% of respondents planning to visit the region between September and December. Although this represents a 14-point decline from last autumn, Chinese travel sentiment continues to be the strongest among all markets surveyed. Resilient demand is particularly visible among younger travellers and affluent older consumers, who are both eager and willing to spend. Still, broader economic headwinds—ranging from subdued consumer confidence to high household savings rates and persistent caution about the economy—may temper discretionary spending. As a result, some travellers could favour domestic or short-haul options over long-haul international journeys in the near term.

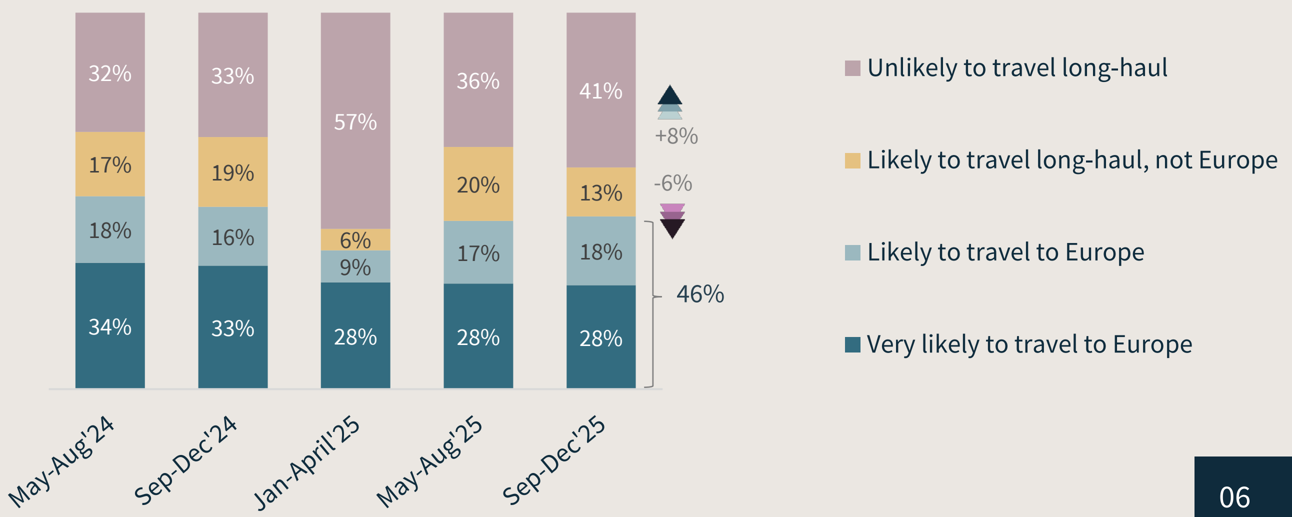
High costs weigh, but travel still a priority for Brazilians

Brazilians show some of the strongest appetite for European travel this autumn, with 46% planning a trip—the second highest level among all markets surveyed. This figure represents a slight dip of two percentage points from 2024, when intentions stood at 48%. Economic pressures remain a significant factor shaping travel behaviour in 2025, with more than half of Brazilians (52%) citing high travel costs as the main obstacle to visiting Europe this season—a much higher share than in other markets. Yet, despite this financial strain and a generally cautious consumer outlook, travel holds a special place in Brazilian priorities. Many are choosing to allocate their budgets toward experiences abroad, showing a growing willingness to spend on flights, cruises, and related services throughout 2025.

China



Brazil



Respondents are asked to use a slider ranging from 1 to 100 (1 - definitely not, 100 - definitely yes) to express their intention to travel to Europe in the next four months. The category 'very likely' comprises the share of people who place the slider between 70 and 100, indicating a high level of confidence in their travel plans. **Minor discrepancies in totals are the result of rounding.*

Evolution of travel intention to Europe in selected markets

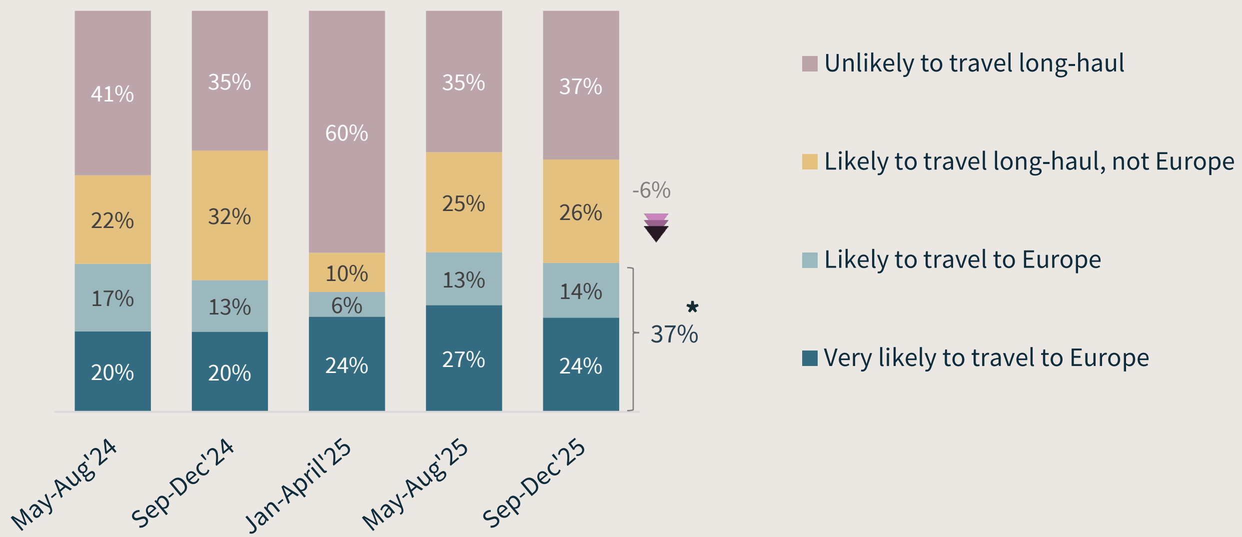
More Australians seek value in off-peak travel

More Australians are setting their sights on Europe this autumn, with 37% planning to travel, a rise of four percentage points compared to 2024. This growth suggests a rising interest in shoulder-season travel, as more Australians seek less crowded destinations and better value outside the peak summer months. A closer look at recent data highlights the driving force behind this trend: Younger travellers. Outcomes from this report reveal that 50% of Australians aged 18 to 34 say they intend to visit Europe between September and December 2025. Their spontaneity, motivation, and eagerness to explore are fuelling Europe's appeal and shaping the outlook for Australian outbound travel in the months ahead.

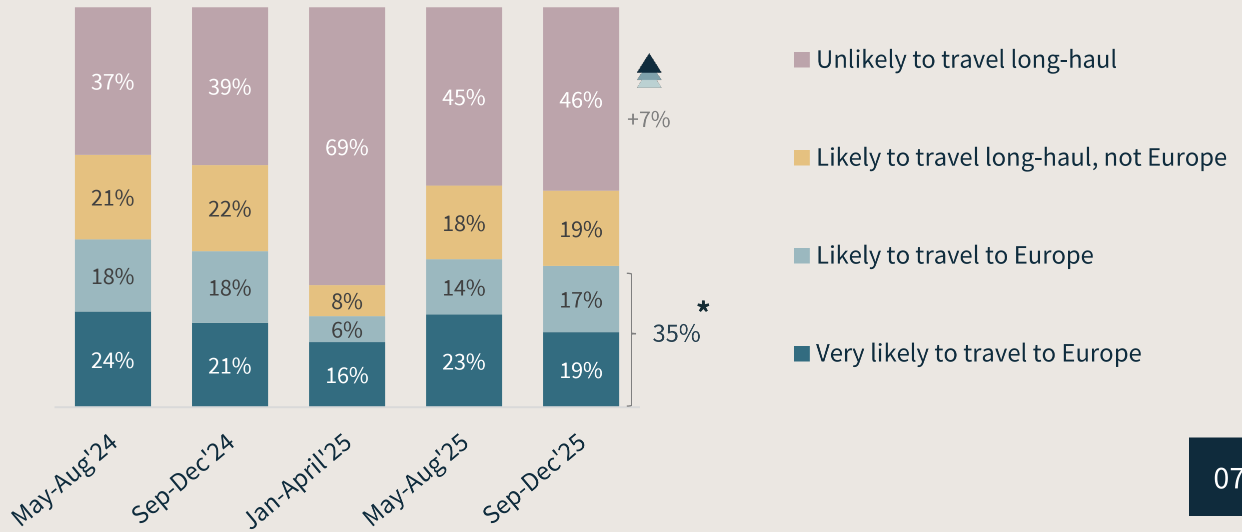
Fewer Canadians plan overseas trips this autumn: Interest in Europe slips slightly

Canadian interest in travelling to Europe this autumn remains steady but slightly diminished compared to last year. Between September and December 2025, 35% of Canadians express an intention to visit Europe—a small dip of four percentage points from the same period in 2024. At the same time, a growing share of travellers, now 46%, are opting out of overseas journeys altogether. Traditionally, Canadians have looked south of the border for most of their travel connections, with the United States being a top destination. Yet, policy friction in the U.S. have cooled Canadian sentiment, sparking early signs of a pivot toward other international destinations. Still, economic realities remain a powerful constraint. High travel costs—cited by nearly half of respondents—continue to limit both long-haul travel in general and European journeys in particular, dampening the potential for stronger growth in outbound demand.

Australia



Canada



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Evolution of travel intention to Europe in selected markets

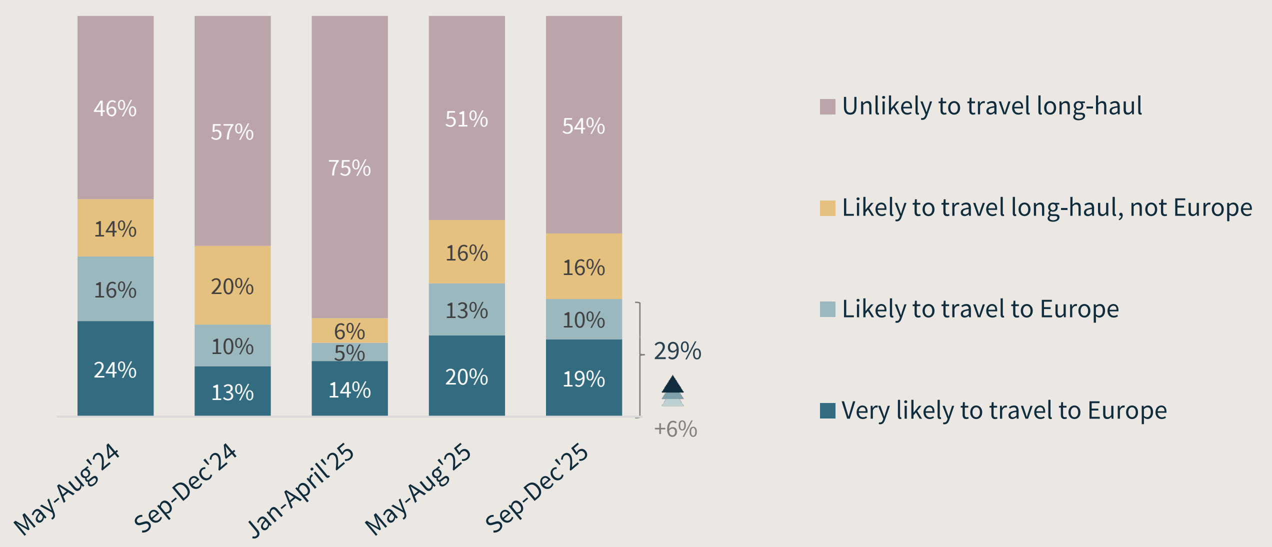
Shifting behaviours shape US autumn travel plans

Travel intentions from the US to Europe over the next four months remain modest, with 29% of Americans planning a trip. Still, this marks a notable increase of six percentage points compared to last year's 23%, reflecting a gradual rebound in interest. Lufthansa reports that demand from the US was particularly strong during the summer of 2025, though a slowdown is expected in the autumn as economic uncertainty, a decline in business travel, and shifting consumer behaviours weigh on travel plans. While the fragile economy continues to shape purchasing decisions, political factors appear to have little influence. Despite ongoing reputational challenges linked to the Trump administration's policies, American travellers report largely positive experiences abroad: Seven out of ten US travellers who ventured overseas since January 2025 said they felt welcomed by locals.

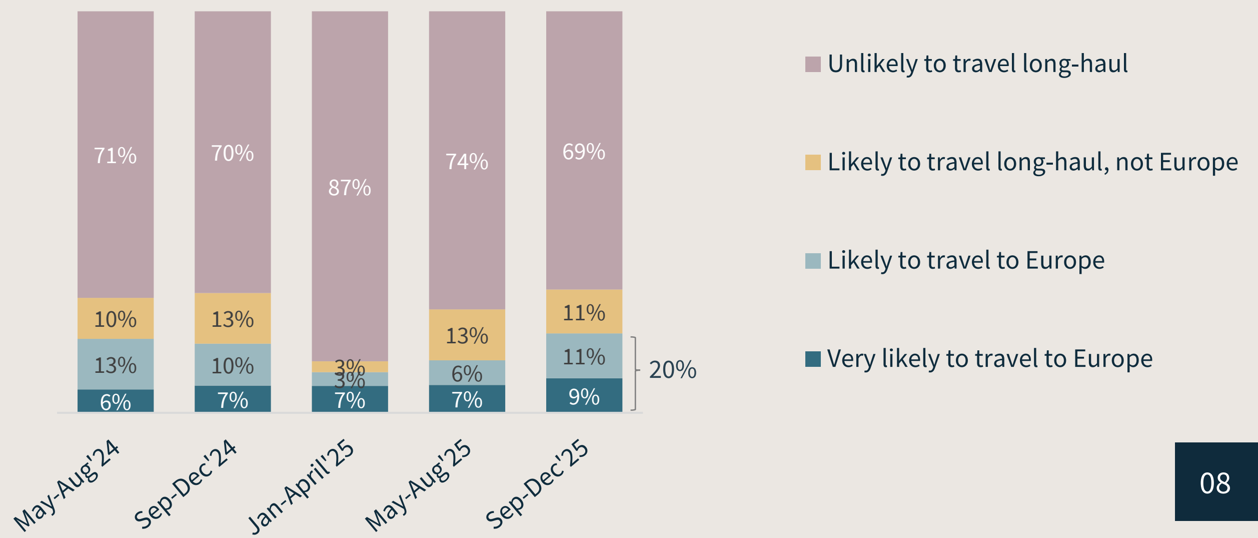
Japan's hesitant return to Europe

Japanese travellers remain notably hesitant to venture abroad, showing the lowest intention among all markets to visit Europe in autumn 2025, with only 20% expressing such plans, a modest three-point increase from last year's 17%. Again, the primary barrier holding back demand is the high cost of travel, cited by 43% of respondents, and largely a consequence of the weakened yen. Yet, there are signs of a slow but steady recovery. Looking ahead, the outlook is cautiously optimistic: As exchange rates begin to stabilise and broader economic conditions improve, outbound demand is expected to strengthen. This resurgence is likely to be fuelled in particular by younger generations, with women in their 20s emerging as the most eager group to embrace international travel once again.

US



Japan



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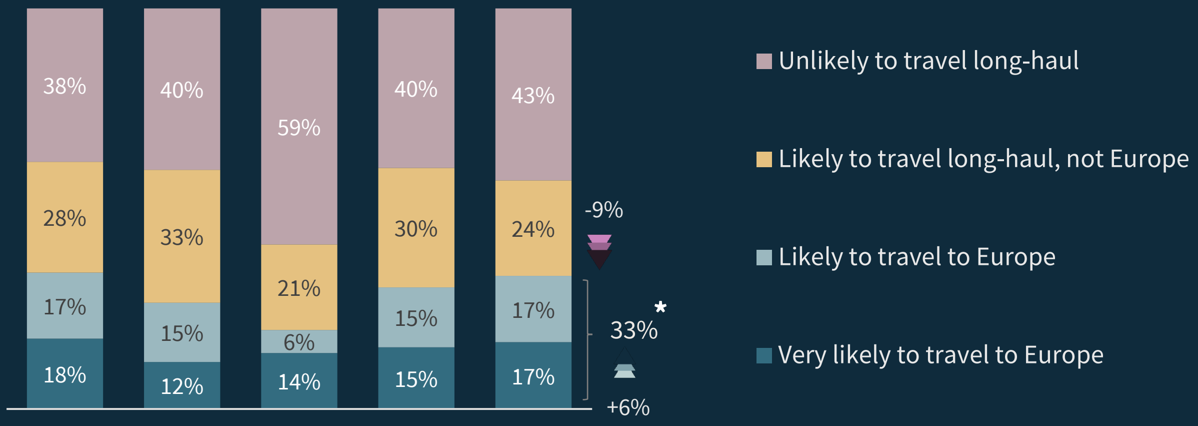
Evolution of travel intention to Europe in selected markets

International travel outshines domestic for Korean tourists

As the year draws to a close, South Koreans are showing a healthy appetite for international travel. 57% of respondents plan to travel long-haul between September and December 2025, echoing the trend seen last autumn. Among these, Europe attracts the interest of 33%, while another 24% are setting their sights on other long-haul destinations. A recent survey suggests that many South Koreans are more satisfied with international than domestic travel for its greater variety and cultural richness despite challenges like costs and planning complexity. Europe's appeal seems particularly strong among the country's upper-class citizens, as nearly half (47%) of those planning a European getaway this fall belong to this category.

South Korea



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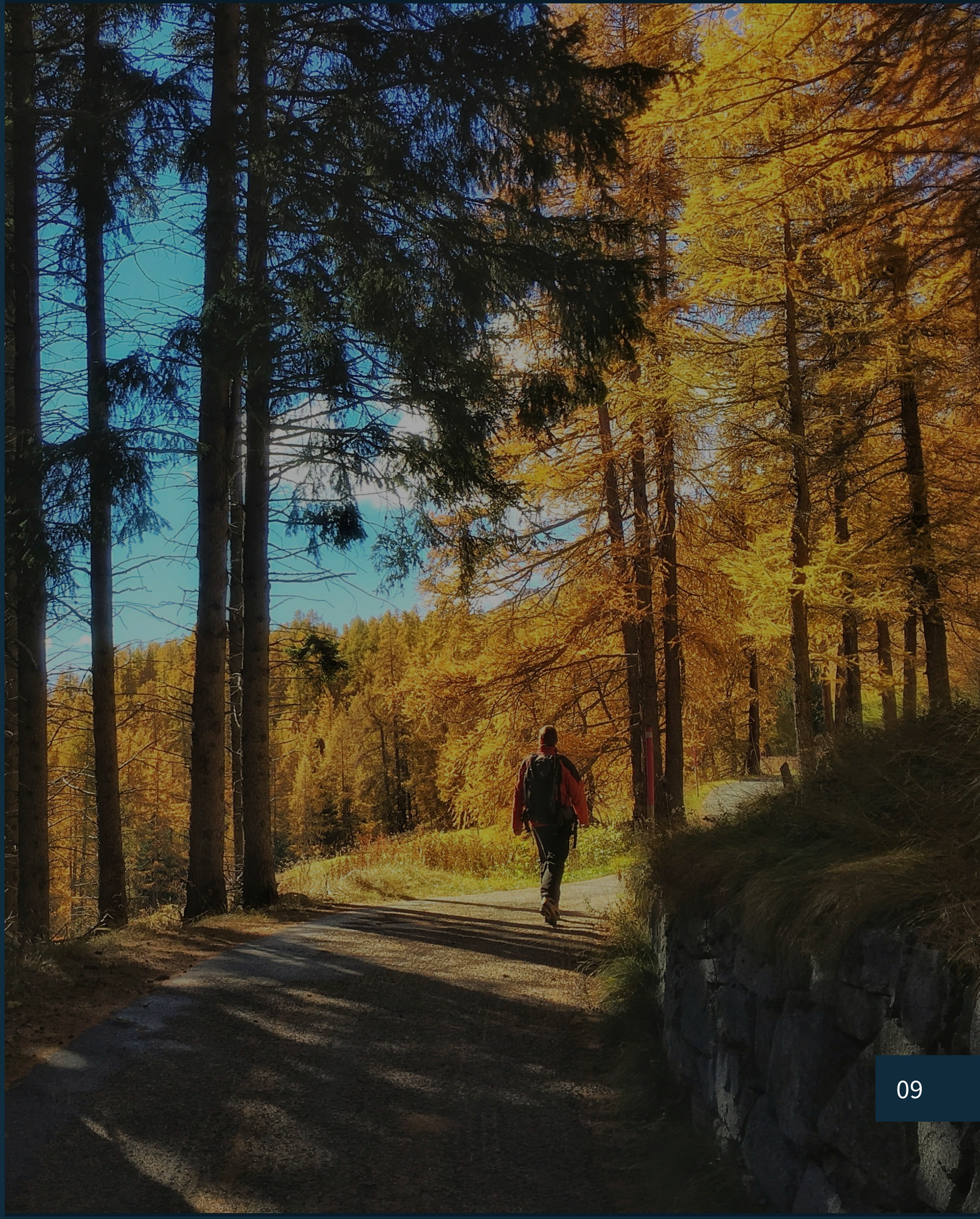
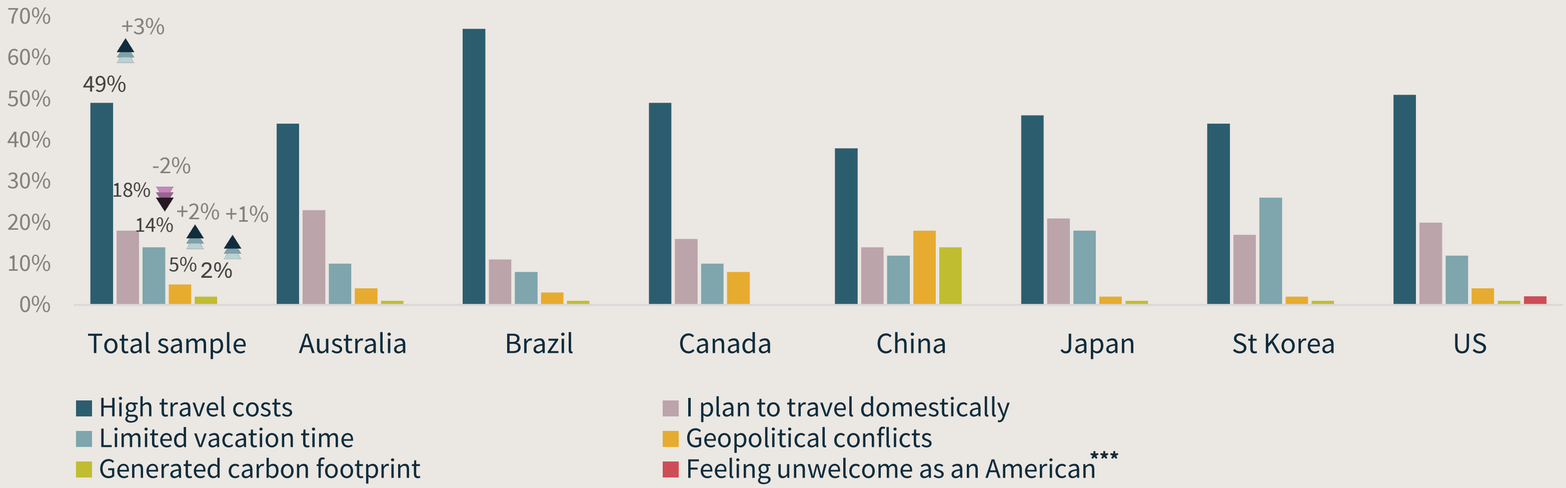


Time and costs still limit long-haul journeys

- High travel costs remain the biggest obstacle to overseas trips this autumn, cited by nearly half of all respondents (49%)—a three-point rise from last year. This suggests that inflationary pressures and currency fluctuations are still shaping travellers' choices. Brazilians feel this most acutely (67%), while Chinese are least affected (38%). Younger travellers are particularly sensitive to costs, with 61% of those aged 18–34 discouraged by expenses.
- Domestic travel is the second most common barrier (18%), especially in Australia (23%) and Japan (21%), and is most preferred by older travellers over 50. This age trend may reflect not only comfort and familiarity but also lingering caution in uncertain times. Limited vacation time continues to play a role, particularly for Japanese (18%) and South Koreans (26%), though its influence has weakened since last year (-2% for all markets). Concerns about geopolitical conflicts and the carbon footprint of long-haul travel have also grown, with Chinese respondents showing the highest sensitivity to these issues (18% and 14% respectively).
- When focusing on barrier to travel to Europe, cost remains the primary deterrent (42%), followed by a strong desire to explore other world regions—most notably among Chinese (32%) and Australians (29%), with older travellers driving this trend. Among Americans, a small yet present share (8%) express concern that political tensions linked to Trump-era policies could affect how welcome they feel in Europe, adding a unique dimension to their travel hesitations.

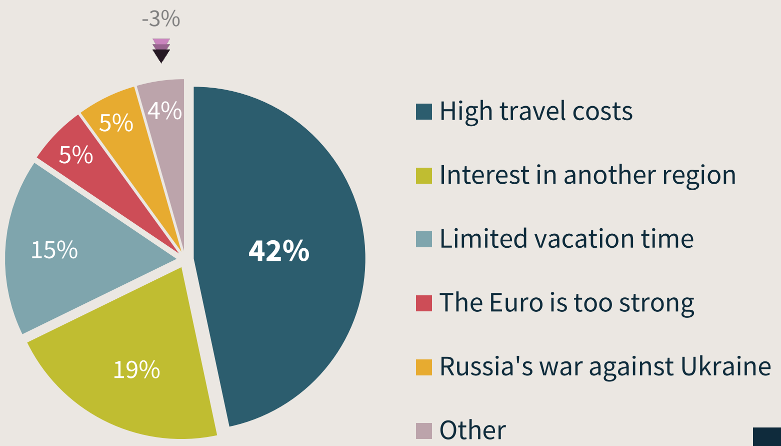
Barriers to travelling long-haul in autumn 2025*



The sample comprises **respondents not planning to travel overseas in autumn 2025*

**** This question was **only** asked to **American respondents**.*

Barriers to travelling to Europe in autumn 2025**



*** The sample comprises **respondents from all markets who intend to travel long-haul in autumn 2025, <u>but not to Europe</u>**.*

Planning details

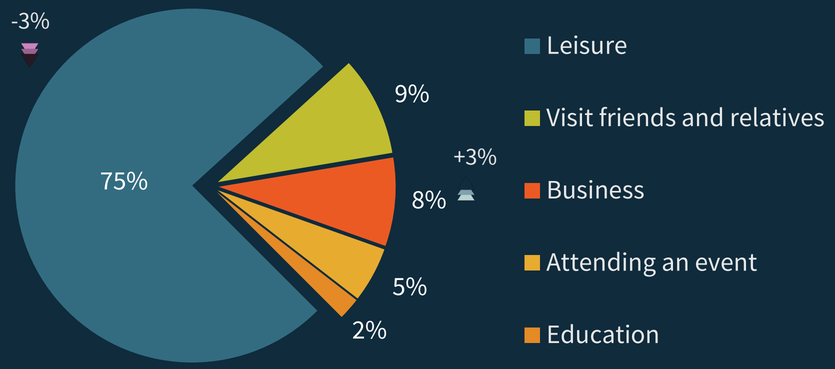
Travel horizon:
September-December 2025

Sample of respondents likely to travel to Europe (N=2,808)

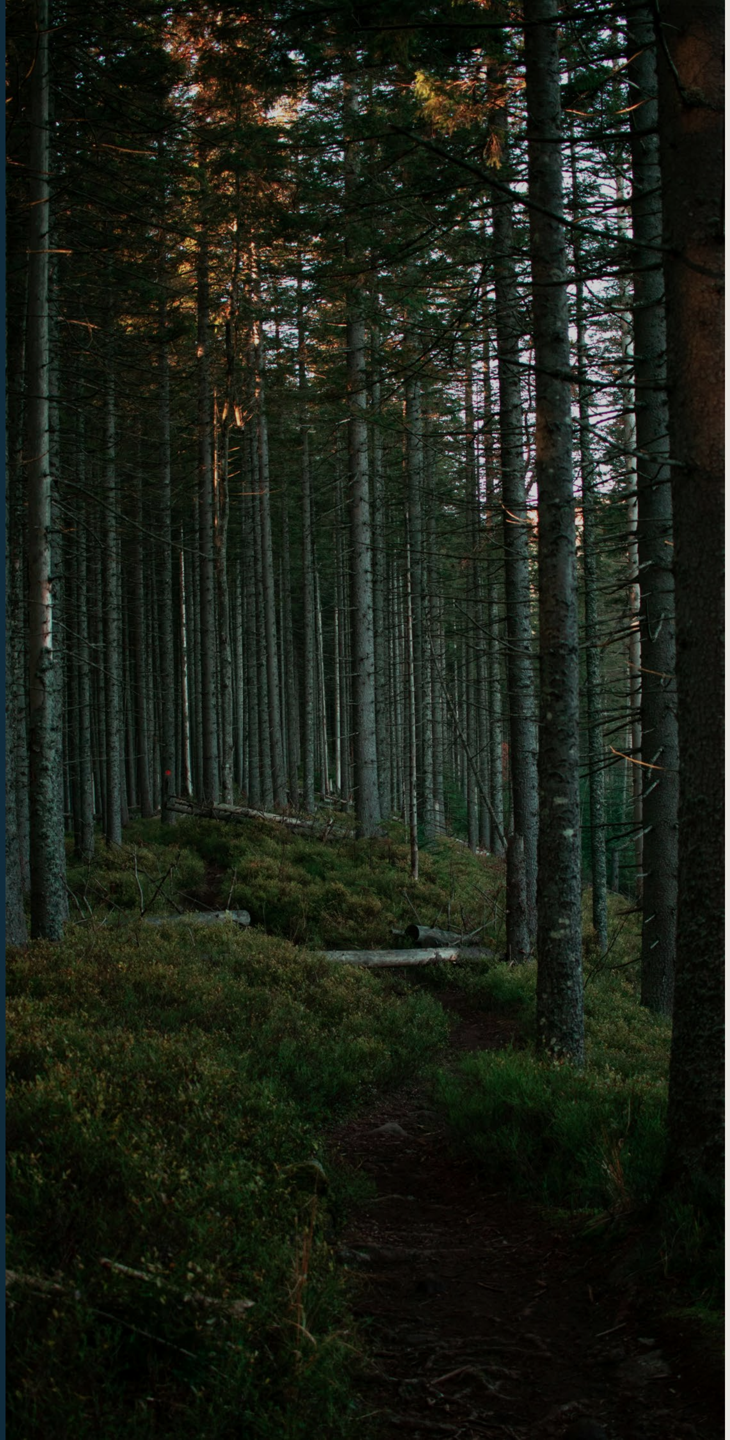
02

Leisure still leads, but business travel gains ground

Purpose of travel

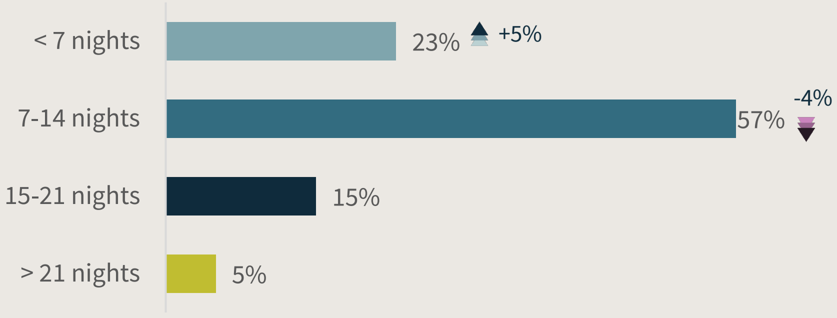


- **Leisure** continues to be the main driver of European travel this autumn, with three out of four respondents (75%) citing it as their primary reason.
- **Visiting friends and relatives** also plays a role, especially for Canadians (17%), and to a lesser extent Australians and Americans (both 12%).
- While leisure travel has dipped slightly compared to last year (-3%), **business travel** is gaining ground, rising to 8% from 5%. Business travellers are often group-based (23%), with particularly strong representation from Australia (15%).



Shift toward shorter holidays this autumn

Intended length of stay



- European trips this autumn are most commonly planned for 7–14 nights. Compared with last year, the share of medium-length trips (7–14 nights) has declined, while shorter stays of up to a week have gained ground.
- This shift is particularly visible in China and Australia, where more travellers now opt for trips under a week (China rising from 10% to 21%, Australia from 4% to 13%).
- At the same time, fewer Chinese and Brazilian travellers expect to take 7–14-night trips.

Travellers seeking more flexibility and choice

Almost half of travellers (42%) have already booked their trip to Europe, a significant decrease from 46% last year.

Most popular booking methods

- 7%

39% **Full package from a tour operator** (flights, accommodation, food excursions, entrance fees, etc.)

32% **Partial package from a tour operator** (only flight tickets, flight tickets and accommodation only, etc.)

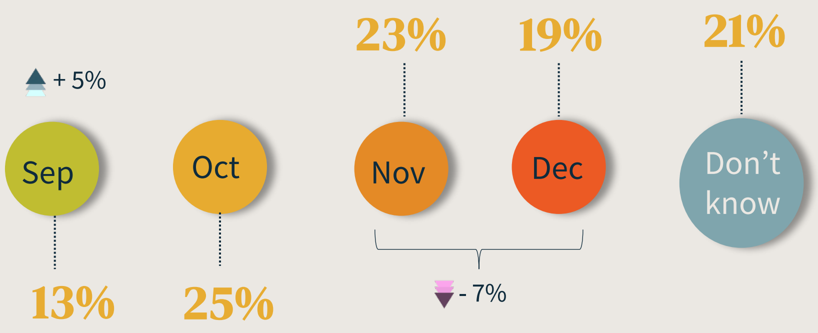
- 4%

32% **Separate bookings of different travel aspects** (flights, accommodation, excursions, events, etc.) from various providers.

Europe's autumn demand peaks mid-season

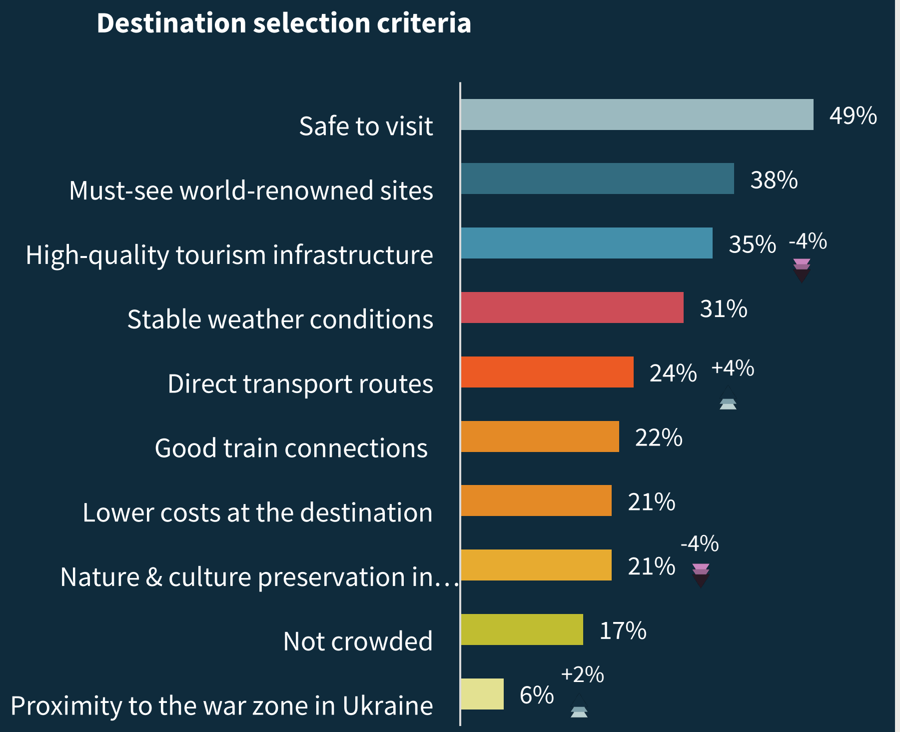
Travel to Europe this autumn is spread unevenly across the season with **October** standing out as the peak month (25%) of long-haul travellers planning to visit – a trend that may be partly reflected by China's early-October Golden Week holiday. **September** remains quieter (13%), though interest has grown strongly compared to last year, driven by rising demand from Japan, China, and South Korea.

Preferred travel month



Compared with 2024, **November and December** show a noticeable dip in European travel plans (-7%), with fewer Chinese travellers in particular planning November trips, which is in line with the decrease in overall travel sentiment to Europe.

What drives destination choice?



Safety guides travel choices with evolving preference for convenience

When choosing a European holiday destination, travellers place the greatest weight on safety (49%), must-see sites (38%), and quality tourism infrastructure (35%). Yet perceptions are shifting significantly across markets.

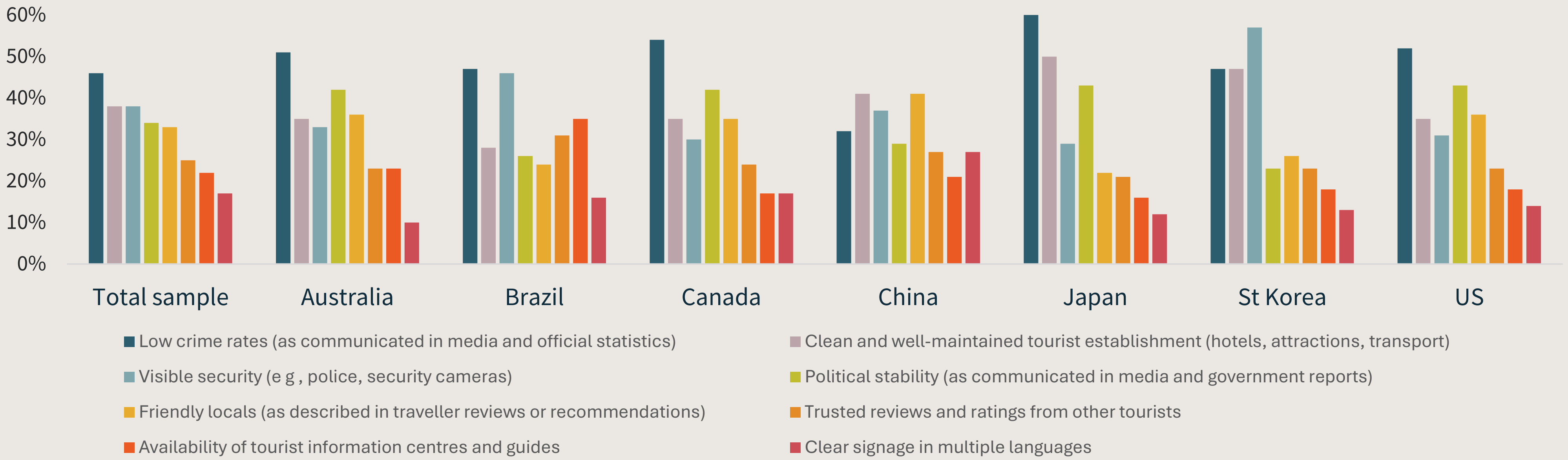
- **Safety** has become less of a priority for Chinese travellers, falling 10% compared to 2024, while Brazilians show the opposite trend, with concern about safety rising by 7%.
- **Quality tourism infrastructure** has also slipped in importance (-4% for all markets), particularly in China, where interest dropped sharply (-16%). Australians, however, now value infrastructure more, recording a 9% increase since last autumn—perhaps reflecting a stronger demand for reliability and comfort on long-haul trips considering the notable share of Australian business travellers to Europe.
- Finally, **direct transport routes** are gaining importance overall, especially among Chinese respondents (+16%), highlighting a preference for convenience and accessibility. Canadians, by contrast, view this factor as less critical (-6%).

What makes a destination safe?

Markets' perspective

- Safety remains a decisive factor in shaping European travel choices this autumn, though its meaning is shaped by context across markets. For most travellers, low crime rates are the key benchmark—particularly for Japanese (65%), Canadians (54%), and Americans (52%)—making destinations with reputations for higher crime less attractive.
- For Chinese respondents, however, safety is perceived differently: clean and well-maintained tourism facilities, along with the friendliness of locals, rank as their top priorities (41%). While the emphasis on cleanliness is also strongly shared across Asia—with Japanese (50%) and South Koreans (47%) rating it higher than Western markets—the importance of friendly locals appears to be particularly distinctive to Chinese travellers. This suggests that for many Asian visitors, visible order and cleanliness signal safety, while for the Chinese market, personal warmth and hospitality add an extra layer of reassurance.
- Visible security measures, such as police presence and surveillance, are another crucial element, cited by 38% overall. South Koreans stand out, with 57% ranking it as their leading safety concern—possibly reflecting a preference for reassurance through authority. Brazilians also place strong weight on this factor (46%), while it resonates less with other markets.
- Political and geopolitical stability rounds out the list of top concerns (34%). Here, Japanese and American travellers (43% each), as well as Australians and Canadians (42%), are particularly sensitive, likely reflecting heightened risk awareness. By contrast, other markets appear more resilient, showing less hesitation to travel during times of global uncertainty.

What makes a destination safe in your opinion?



Europe's safety image in the eyes of international travellers

Perceived safety of Europe in autumn 2025

	All markets	Australia	Brazil	Canada	China	Japan	St. Korea	US	Australia
Political climate	**3.9**	3.9	3.9	3.9	4.3	3.7	3.9	3.8	3.9
Personal safety	**3.9**	3.9	4.0	3.8	4.2	3.5	3.3	4.0	3.9
Tensions tourists vs. locals	**3.7**	3.6	3.7	3.6	4.2	3.6	3.4	3.6	3.7
Natural hazards (weather)	**3.7**	3.6	3.5	3.6	4.1	3.6	3.7	3.7	3.7
International conflict / terrorism	**3.6**	3.4	3.4	3.5	4.0	3.4	3.5	3.5	3.6

Color-coded by score

4.0 – 5.0 → Safe to Very Safe
3.0 – 3.9 → Neutral to Slightly Safe
2.0 – 2.9 → Unsafe
1.0 – 1.9 → Very Unsafe

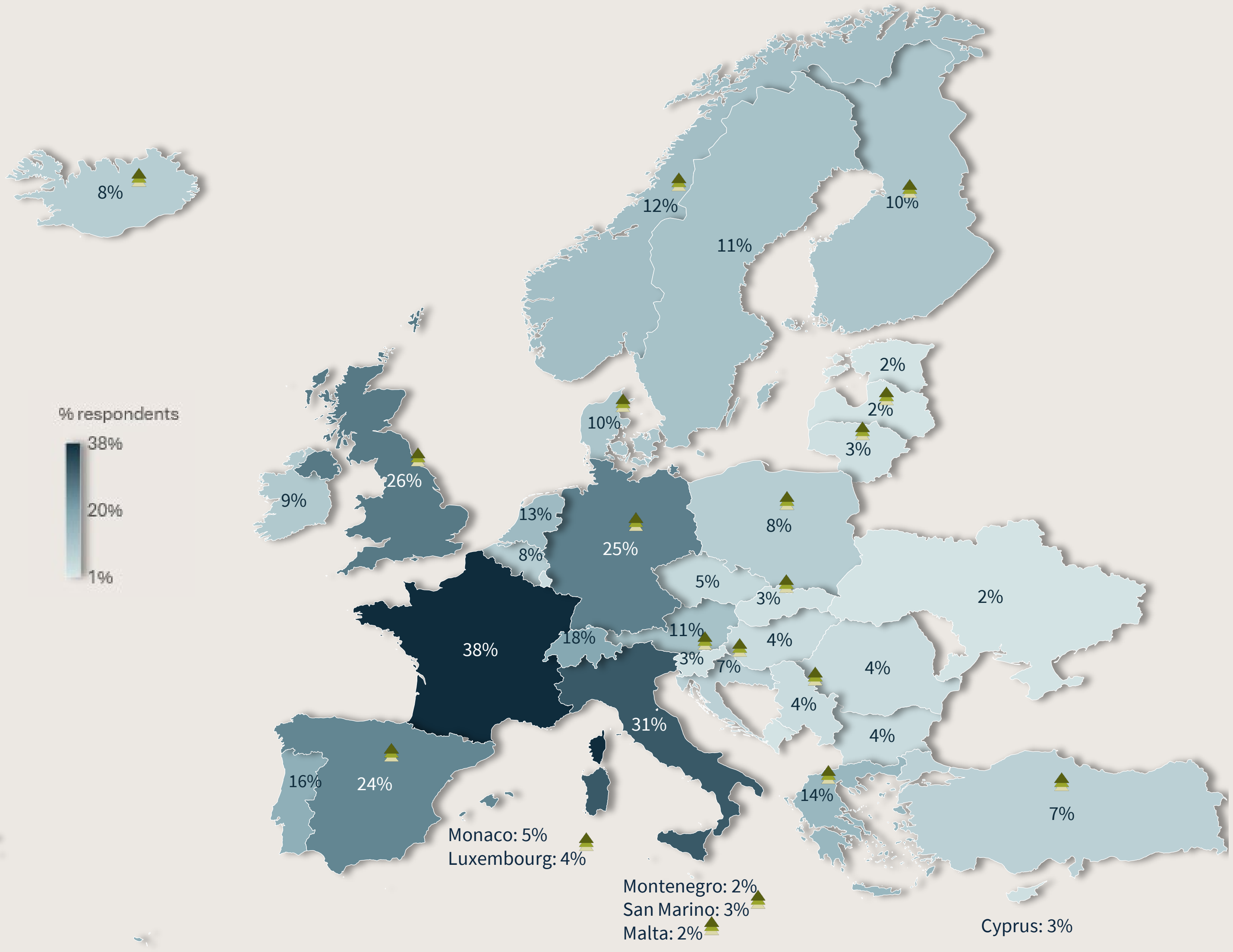
Mean safety scores (1 to 5) across five safety dimensions for each region (Europe, North-America, South-East Asia, North-East Asia, Middle-East), were rated by respondents from seven overseas markets, excluding their own.

Europe tops global safety rankings

- Europe stands out as the safest region worldwide, consistently achieving the highest ratings across all five safety dimensions compared to other global regions. Its reputation (*safe to very safe*) for political stability (71%), personal safety (68%), and low risk of natural hazards (63%) underpins strong traveller confidence—**specifically among Chinese respondents**, who view Europe most positively.
- Still, perceptions are not uniform: Japanese and South Korean travellers express more scepticism with lower scores (*safe to very safe*) on all dimensions compared to the overall market average, reflecting cultural caution and perhaps greater sensitivity to political or social risks. Concerns over terrorism, international conflict, and even tensions with locals are more pronounced in Australia, Brazil, Japan, and South Korea, hinting that news coverage and cultural expectations play a role in shaping safety perceptions. Overall, however, Europe's image as a safe, reliable, and welcoming region remains unmatched compared to other world regions.

A diverse range of destinations shapes autumn travel

Preferred European destinations for holidays in autumn 2025



*Significantly **more** ▲ **less** ▼ respondents plan to visit this country compared to a year ago (September-December 2025)*

+3

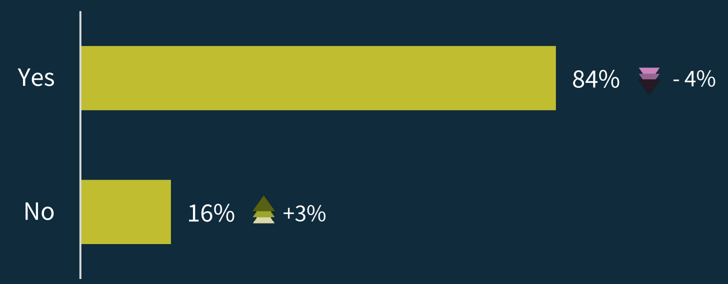
73% of autumn travellers to Europe plan to visit more than one country

Interest in Nordic destinations is on the rise, with Norway, Iceland, and Finland all showing significant growth — +3% each since last year — as long-haul travellers are increasingly drawn northwards toward the end of the year.

Once at the destination long-haul travellers shift towards slower, more flexible European travel

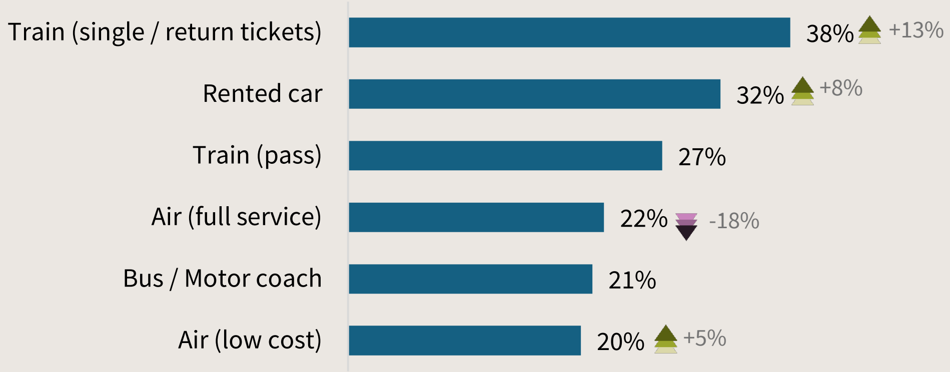
The share of travellers planning to visit multiple places within a single European country has slipped to 84% from last year. Instead, more travellers (16%) are opting to stay in just one place. This trend, also driven by Chinese (and US) markets, suggests that while Chinese travellers want to broaden their horizons across Europe, they are also increasingly willing to slow down once they arrive.

Plan to visit more than one place in a European country*



Modes of transport considered to travel from one place to another in a European country

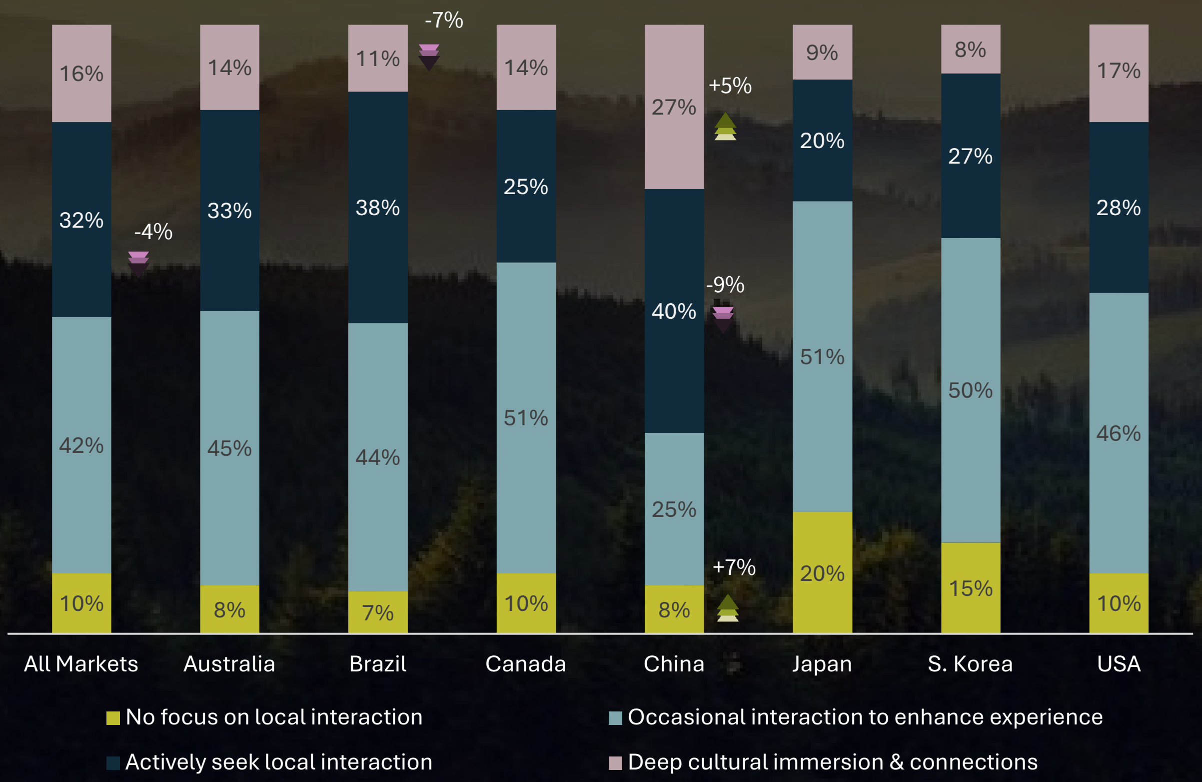
Among travellers planning to move between destinations within their European country of choice this autumn, trains (38%) and cars (32%) have become the preferred modes of transport—both recording notable growth compared to last year. In contrast, the use of full-service flights has dropped sharply (-18%). Much of this shift is fuelled by the Chinese market, hinting at a growing appetite for more flexible and possibly more sustainable ways of exploring Europe.



Only respondents intending to stay in one European country were asked this question.

Beyond the tourist trail – Travellers' willingness to interact with locals

Intention to interact with locals



Observations:

- Travellers continue to value local interaction as part of their European journeys, though the level of enthusiasm varies. While 42% are open to engaging with locals occasionally to enrich their travel experience, only 32% actively seek such opportunities—a decline of four points compared to last year, suggesting a softening in interest.
- Chinese travellers stand out as an exception: 27% are eager to build meaningful connections with locals, well above the overall market average of 16%, and this figure has grown stronger since last year (+5%).
- Age also plays a role—36% of younger travellers (18–34) show a clear interest in actively seeking local interaction, while older travellers (50+) are far less inclined, with only 28% actively seeking interaction. This generational divide hints at a shift toward more immersive, people-focused travel among the young, while older visitors remain more reserved.

Over half (55%) of long-haul travellers prefer local experiences, choosing small businesses over established brands to better connect with the culture.*

**Respondents were asked to select one of the two options "I prefer convenience and familiar brands when travelling long-haul." vs. "I prefer local culture and support small/local businesses when travelling long-haul." – These represent shortened versions of the questions.*

Dining, activities, and shopping define Europe trips

Top 3 budget spending categories

Travellers dedicate most of their budgets to **dining** (69%), led by Canadians (77%), Australians and Brazilians (75% each). By contrast, Chinese travellers spend less on food, while group travellers value shared meals most as compared to other travel parties.

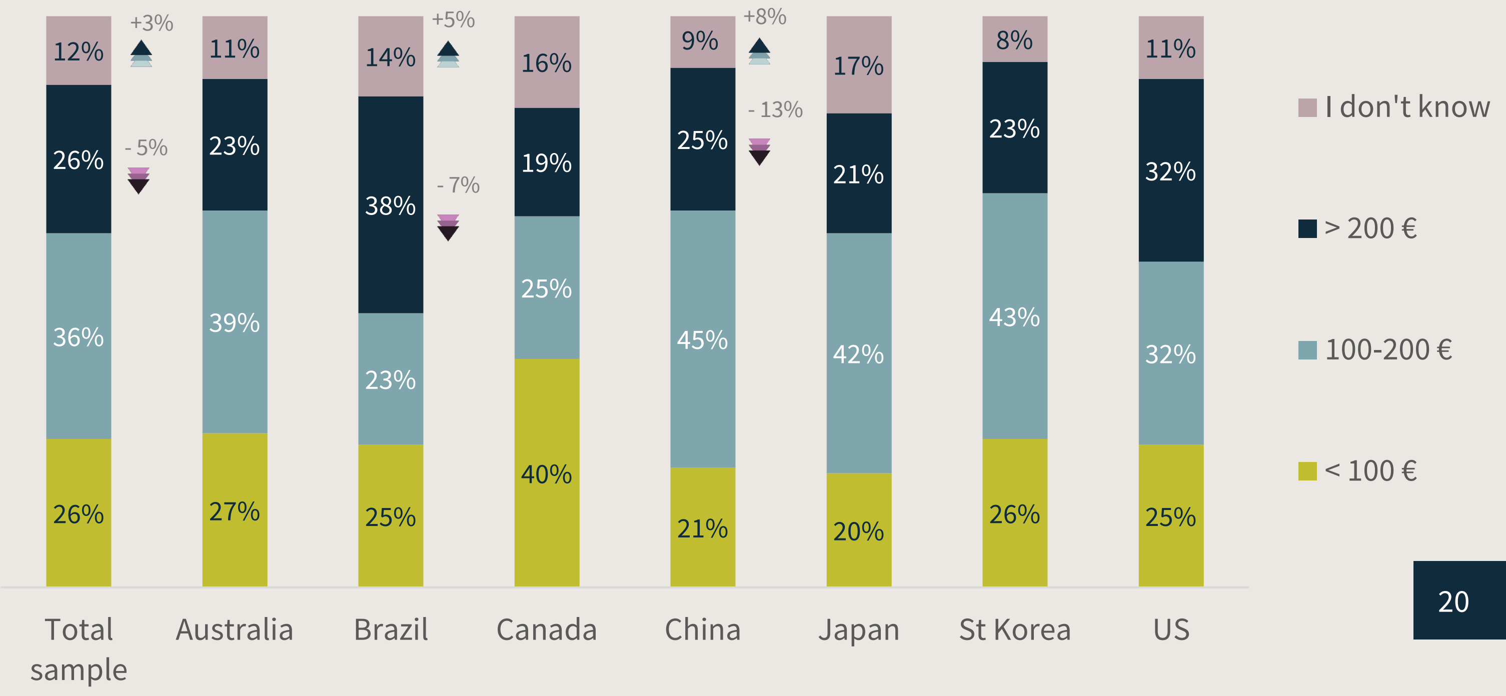
Tourist activities are the second top spending category (50%), except in South Korea (29%), where travellers favour transport, shopping, and accommodation.

Shopping ranks third in travel spending (47%), driven by strong interest from Japanese (62%) and Chinese (56%) travellers. By contrast, it is less of a priority for Americans, Canadians, and Australians.

Moderate travel budgets with shifting priorities

Travellers are budgeting cautiously for Europe, with 36% planning to spend €100–€200 per person per day. The share expecting to spend over €200 has dropped from 31% to 26% compared to last year. This shift is most visible in China and Brazil, where fewer travellers now anticipate spending at the top tier, perhaps reflecting caution amid global economic uncertainty. At the same time, a rise in the share of respondents answering “I don’t know” in these markets hints at growing hesitancy and a wait-and-see approach to budgeting.

Intended daily budget



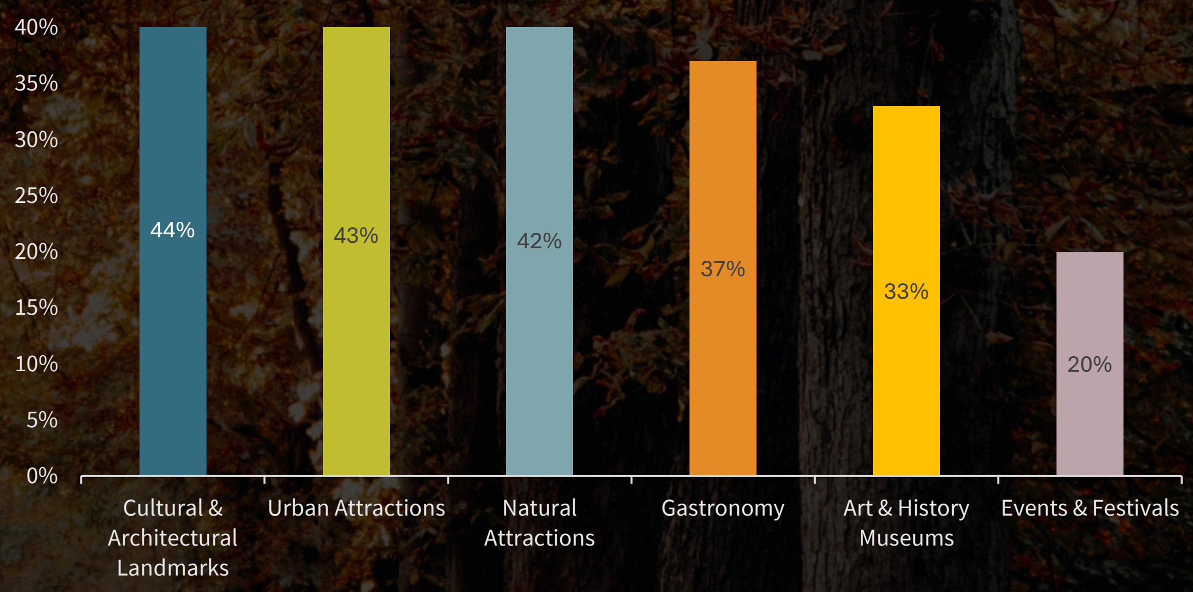
Expenditure is per person and includes accommodation, food and other activities - excluding flight tickets to Europe

Familiar favourites prevail: Cultural and urban attractions top long-haul traveller wishlists

For most long-haul travellers— 62% — comfort and familiarity win out, with popular European destinations and their established offerings beating out the charm of hidden gems.*

Cultural and architectural landmarks remain the top draw for travellers in Europe, attracting 44% of respondents. Close behind are urban attractions (43%)—such as iconic squares and shopping streets—and natural sites (42%) including mountains, lakes, and national parks. Chinese travellers show the strongest enthusiasm for Europe's architectural heritage (55%). These findings reflect a balance of interests in Europe's history, its vibrant cities, and its natural landscapes.

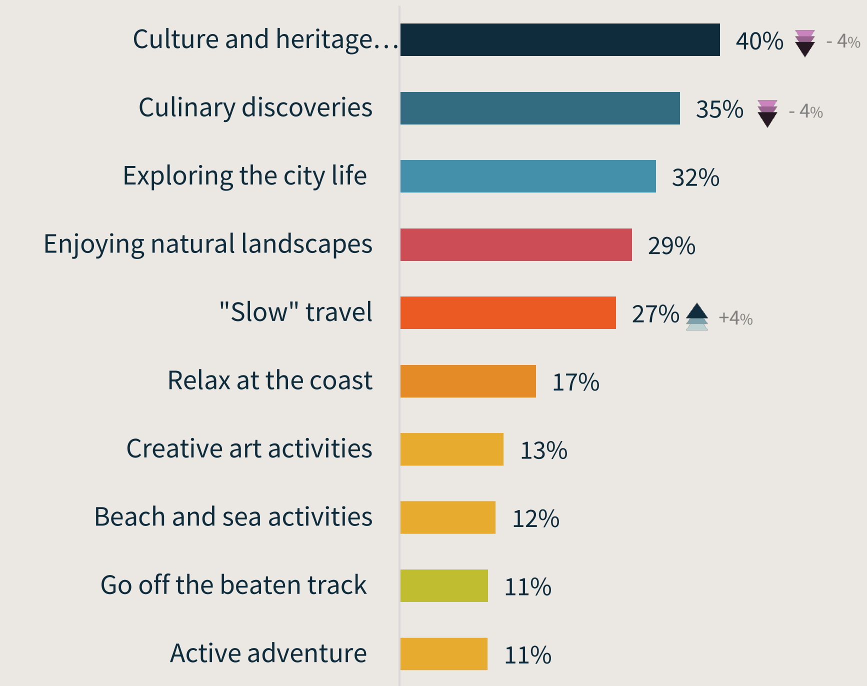
Types of tourist attractions most eager to visit

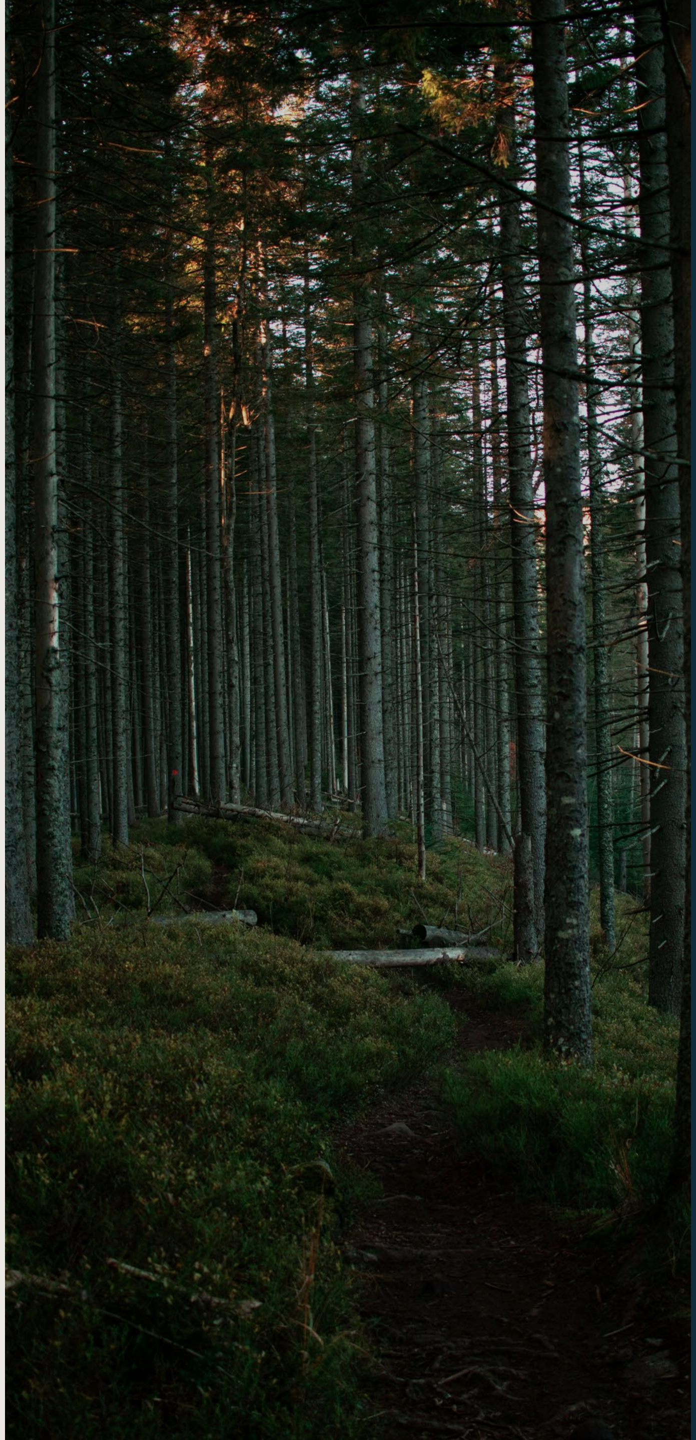


**Respondents were asked to select one of the two options "I prefer popular European destinations with established infrastructure." vs. "I prefer hidden gems and off-the-beaten-path experiences." - These represent shortened versions of the questions*

For long-haul travellers culture still tops the list, but slow travel rises

Top experiences on travellers' lists for Europe, autumn 2025





First-time travellers lean toward nature and wellness

Culture and history top travellers' wish lists for European trips this autumn, with 40% ranking them as a priority, followed by gastronomy (35%), city life (32%), and nature (29%). Yet interest in both culture and food has dropped since last year (down 4 points each), while slow travel has risen (+4%), suggesting a growing appetite for more relaxed experiences.

Preferences also vary across markets: in China, gastronomy, city life, and slow travel all outweigh culture and history as compared to the rest of the surveyed nationalities.

Meanwhile, repeat visitors show a stronger pull toward Europe's cultural heritage, while first-time travellers are more inclined toward nature, wellness, and spa experiences. These patterns suggest that Europe's enduring cultural draw is evolving, with travellers increasingly blending heritage with lifestyle and wellbeing.

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