

Press Release

Europeans Keep Travelling as Off-Season Demand for Southern Destinations Grows

- The European Travel Commission (ETC) releases the latest insights on Europeans' travel sentiment, showing stable intentions and resilient budgets across the region.
- Supported by insights from ten key European markets, the study highlights a growing appetite for off-season travel, with Southern Europe leading the way.

Brussels, 6 October 2025: Europeans continue to prioritise travel, showing steady enthusiasm for exploring the continent even as the seasons turn cooler. According to the latest “Monitoring Sentiment for Intra-European Travel” report (Wave 23) by the European Travel Commission (ETC), 73% of Europeans intend to travel between October 2025 and March 2026, a figure that remains unchanged from last year.

International travel within Europe is on the rise. Most Europeans (63%) plan to travel beyond their home country this autumn and winter — a noticeable 3% increase from last autumn. Of these, 35% intend to visit neighbouring countries, while 29% are choosing more distant European destinations.

Travel also continues to **top Europeans' spending priorities**, with 82% maintaining or increasing their travel budgets, far ahead of other leisure activities. Still, financial limitations remain the main barrier for those not planning a trip (36%), followed by a lack of time (27%).

Mature travellers drive demand

While enthusiasm for travel remains high, Europeans are planning **fewer trips** overall than last year. Nearly half (45%) will take only one holiday in the coming six months, a notable seven-point increase. Only one in three (34%) expect to travel twice, and just 16% plan three or more trips, marking a six-point drop.

The data also points to a **maturing travel market**. Middle-aged Europeans, particularly those aged 45–54, show the strongest travel intentions this season, while younger adults are slightly less likely to plan trips compared to last year. As travellers age, their behaviour also becomes more selective, with a growing preference for fewer but more meaningful holidays. Almost half of those over 55 now prefer a single trip, compared with roughly one-third of younger adults. This shift suggests a focus on quality and value rather than frequency.

A shift towards immersive travel

Europeans are also rethinking how they travel. Over the coming months, 60% will stay in **one destination** rather than moving between regions, reflecting a preference for deeper local immersion. Single-destination travel dominates among city-break (71%) and sun-and-beach (68%) travellers, whereas culture & heritage (44%) and nature & outdoors (42%) trips more often involve exploring multiple regions within a single country.

At the same time, the speed and convenience of reaching a destination remain key considerations. Air travel is the preferred mode of transport (57%, +4 points), followed by car (25%), including a small but growing share of electric vehicles (4%). Train travel continues to play a secondary role (13%).

Mediterranean Europe sees off-season boost

When choosing where to go, **safety** (20%) remains the leading factor, but **pleasant and stable weather** (15%) has gained importance, rising three points since last year. Combined with the appeal of **attractive deals** (13%) and **destinations with a lower cost of living** (10%), value for money clearly shapes travel decisions across Europe. Half of travellers will visit major tourist destinations, while the other half seek lesser-known, off-the-beaten-track places – showing a balance between Europe’s icons and its hidden gems.

Southern Europe is the standout winner of the season. The **Mediterranean region** now attracts 52% of European travellers, up by a significant seven points compared to last autumn/winter. **Spain** has seen the sharpest rise in popularity (12%, +5 points), while Italy (8%) and France (8%) continue to hold strong appeal. In contrast, interest in Eastern Europe has dropped, with only 4% of travellers planning to visit, down six points year-on-year. These findings reflect an ongoing adjustment in travel behaviour, with more Europeans choosing warmth, comfort, and affordability beyond the summer peak.

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

We see some positive signs for Europe’s tourism ecosystem. High travel intentions, resilient budgets, and off-season interest in Southern destinations can help spread visitor flows and reduce seasonality. Yet with moderate trip lengths and cautious spending, businesses should adapt – developing pricing strategies and tailored packages that encourage longer stays and higher on-site expenditure to maximise value amid shorter travel plans.

Discover more at: <https://etc-corporate.org/reports/monitoring-sentiment-for-intra-european-travel-autumn-25-winter-2026/>

ENDS

This project is co-funded by the European Union.



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Note to editors

The project “Monitoring Sentiment for Intra-European Travel” analyses sentiment, motivations, and behaviours related to domestic and intra-European travel across ten major European source markets: Germany, the United Kingdom, France, the Netherlands, Italy, Belgium, Switzerland, Spain, Poland, and Austria. Since September 2020, the research has provided key findings and recommendations for destinations and tourism authorities in regular reports. To access previous editions, please visit this [link](#).

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 europeantravelcommission.com.

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