

Press Release

Long-haul travellers grow more cautious in 2026, while safety and flexibility shape demand for Europe

- Global long-haul travel intentions soften for 2026 as financial and time constraints push travellers towards domestic and short-haul trips.
- Interest in visiting Europe remains solid but declines slightly across key overseas markets. Europe continues to rank highest globally on safety.
- More uncertainty in booking behaviour, growing interest in semi-package trips, and rising demand for wellness and slow travel.

Brussels, 9 February 2026: The European Travel Commission (ETC) and Eurail have published the new *Long-Haul Travel Barometer 1/2026*, providing forward-looking insights into travel intentions, preferences and barriers among travellers from seven key overseas markets to Europe: Australia, Brazil, Canada, China, Japan, South Korea and the United States. The findings point to a more cautious outlook for long-haul travel throughout 2026, shaped by affordability concerns, growing preference for domestic or closer-to-home trips and limited vacation time.

Across surveyed markets, **59% of respondents plan to take a long-haul trip** between January and December 2026, a notable 5% decline from last year. While the decrease is modest in individual markets, the overall trend reflects rising sensitivity to cost, value and time constraints when planning trips further ahead.

Europe's position across key overseas markets

Interest in visiting Europe remains solid, with **42% of long-haul travellers considering a trip to the region in 2026**, down slightly (-3%) from last year.

Interest varies by market, led by **China** (59%) and **Brazil** (54%). In China, demand remains strong despite a small decline. Travellers increasingly favour personalised and experience-led itineraries. In Brazil, enthusiasm is holding up, though higher costs are nudging some travellers toward domestic and short-haul options, even as Portugal continues to stand out as a preferred destination.

Several overseas markets are showing a clearer tilt toward closer, better-value travel. **Australia** has seen the sharpest decline (47%, -7), reflecting a broader shift away from long-haul travel toward nearby Asian destinations. **Canada** has edged down (45%) amid strong demand for domestic and warm-weather trips. In **the US**, intentions have softened to 34% as economic uncertainty and recession concerns shape destination choice, despite sustained overall travel appetite.

South Korea shows a modest rebound (34%), although opting out of long-haul travel has increased. **Japan** remains the least inclined market, with 20% considering a European trip in 2026.

Cost and time constraints shape travel decisions

Among respondents not planning overseas travel, **high costs are the leading deterrent (52%)**, followed by a growing preference for domestic trips. Affordability remains the main barrier to travelling to Europe (43%), particularly among younger travellers aged 18–34. Limited vacation time continues to constrain travellers in South Korea and Japan the most, while Chinese respondents show heightened sensitivity to geopolitical tensions when planning long-haul trips compared to other source markets.

Safety emerges as a key competitive advantage

Safety has become the **leading criterion** when selecting a European destination, cited by **51% of respondents**, rising significantly year-on-year. **Europe ranks highest globally across all safety dimensions**, including political stability, personal safety and natural hazards. This perception is particularly strong among Chinese travellers, reinforcing Europe's position as a reliable and secure destination in an uncertain global environment.

Changing travel behaviour and emerging trends

Booking behaviour suggests growing uncertainty. Just over one-third of travellers (36%) have already booked a European trip, down from last year, with particularly sharp declines in China and South Korea. Interest in fully packaged travel continues to ease, while demand for **partial packages** is rising. This shift is driven largely by Chinese travellers: preference for partial-package bookings has increased by 3% since 2025, signalling a move to more independent travel planning. Separate bookings dominate among travellers from the US, Canada and Australia.

Leisure remains the main motivation for travel to Europe (75%), but **business travel has increased** notably (9%, +3), with the highest shares coming from Australia and South Korea. **Culture and history** top the list of planned activities, followed by gastronomy, city breaks and nature. **Slow travel** is also gaining momentum, increasing from 22% in 2025 to 26% in 2026.

Spending priorities are shifting as well. Food and drinks remain the biggest budget item, while interest in **shopping** has fallen. This is driven largely by China, where shopping intent dropped from 66% to 51%. **Wellness** remains niche, but interest is growing (+3%), again led by Chinese travellers (25%).

In response to the findings, **Miguel Sanz, President of the European Travel Commission**, noted:

As travellers plan further ahead for 2026, we are seeing a more cautious approach to long-haul travel. In this context, Europe's strong safety perceptions, quality infrastructure and wide range of cultural and nature-based experiences remain clear strengths. Europe continues to stand out as a reliable destination, well-positioned to respond to evolving demand for more flexible travel and experience-led journeys.

As preferences evolve, it's more important than ever that Europe strengthens its branding and global positioning around distinctive, experience-led travel. A clear narrative helps us attract the right travellers: those who travel responsibly, stay longer, and spend locally.

The full report can be downloaded from: <https://etc-corporate.org/reports/long-haul-travel-barometer-1-2026/>

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 35-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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