Press Release

# Europe's travel demand remains steady as spending outpaces arrivals

- The European Travel Commission's Q4 2025 report highlights sustained autumn and early winter demand, with traveller spending rising faster than arrivals across Europe.
- While higher prices continue to shape travel decisions, growing interest in off-season trips and alternative destinations is set to support more balanced visitor flows across Europe.
- Long-haul markets are expected to contribute more significantly to Europe's tourism outlook in 2026.

**Brussels, 18 February 2026:** Europe's tourism sector maintained steady performance into the final months of 2025, as travellers continued to prioritise holidays to and within the region despite elevated travel costs. According to the European Travel Commission's latest quarterly report, **year-to-date international arrivals** to Europe increased by 3.2% year-on-year, while **overnight stays** rose by 3.1%. This marks an improvement on the previous quarter, pointing to higher travel demand through the autumn and early winter period.

Importantly, **inbound travel spending** rose faster than arrivals across most destinations. Overall travel expenditure in Europe is estimated to have increased by 9.7% in 2025. This divergence suggests that tourism performance is increasingly supported by higher per-trip spending and value-oriented demand, rather than volume expansion alone.

**Diverse performance across Europe**

Travel patterns remained geographically broad. **Northern and Central/Eastern European destinations** recorded some of the strongest relative increases in inbound flows. Finland (+14.1%), Norway (+12.9%), Poland (+12.0%), Slovakia (+10.8%) and Hungary (+9.3%) reported notable gains in arrivals. International overnights rose significantly in Lithuania (+22.8%), Iceland (+10.0%) and Latvia (+8.5%).

While these destinations are expanding from a lower base, results reflect growing interest in cooler climates, less crowded settings and destinations perceived as off-the-beaten-path.

Established **Southern and Western European destinations** also maintained solid performance in volume terms. Foreign arrivals increased in France (+8.2%), Greece (+4.4%), Spain (+3.4%) and Italy (+1.2%), underlining continued baseline demand for Europe's traditional tourism destinations.

**Prices and seasonality influence travel behaviour**

**Higher travel prices** continue to shape consumer decisions. While tourism-related inflation is easing, overall costs remain above pre-pandemic levels. As a result, travellers are increasingly seeking value through off-season trips and alternative destinations, though higher prices are also contributing to shorter stays in some destinations. Tourism

Economics' data shows that 79% of industry professionals cite **financial factors** as the sector's most significant current challenge.

**Airline data** also indicates strengthening shoulder-season demand. Revenue Passenger Kilometres rose by 6.7% in October and 7.1% in November, exceeding peak summer growth rates of 4.4% in July and 6.0% in August. Passenger load factors remained broadly stable at around 84%, reflecting steady demand conditions.

The **accommodation sector** also recorded moderate gains. Full-year occupancy levels were 0.8% higher than in 2024, while average daily rates increased by 1.2%, contributing to a 2.1% rise in revenue per available room. Eastern Europe saw the strongest overall performance. In Spain, tighter regulation of short-term rentals has begun to affect supply levels, with thousands of units removed from the market and monthly availability declining by an average of 7.1%.

**Long-haul markets to support 2026 outlook**

Looking ahead, **international arrivals to Europe** are forecast to rise by 6.2% in 2026, with long-haul markets expected to play a more prominent role. Long-haul arrivals are projected to increase by 9%, supported by improving air connectivity and easing visa processing constraints.

**China and India**, both still below pre-pandemic levels in many destinations, are forecast to record notable increases in 2026 (+28% and +9% respectively compared to 2025). Strengthening outbound travel from Asia-Pacific markets is expected to benefit destinations with a higher share of long-haul visitors. At the same time, ongoing uncertainty surrounding US trade and foreign policy is expected to contribute to more moderate arrivals growth from the Americas (4.2%) in 2026.

Despite persistent cost pressures and a moderating global economy, travel demand for Europe remains steady. As spending continues to outpace arrivals and interest in shoulder-season travel grows, destinations are increasingly positioned to focus on value, balanced visitor flows and sustainable performance.

Commenting on the findings, **Miguel Sanz, President of the European Travel Commission,** said:

***The continued resilience of travel demand into late 2025 is a positive signal for Europe's tourism sector. Particularly encouraging is the fact that growth in traveller spending is outpacing that of arrivals, allowing destinations to focus more on value than volume. As interest in travelling beyond the peak summer months continues to grow, tourism can deliver more balanced benefits across regions, supporting local economies, jobs and communities throughout the year.***

The full report can be downloaded from: https://etc-corporate.org/reports/european-tourism-2025-trends-prospects-q4-2025/

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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 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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