Long-Haul Travel Barometer 1/2026

Travel horizons:
January-December 2026 & January-April 2026

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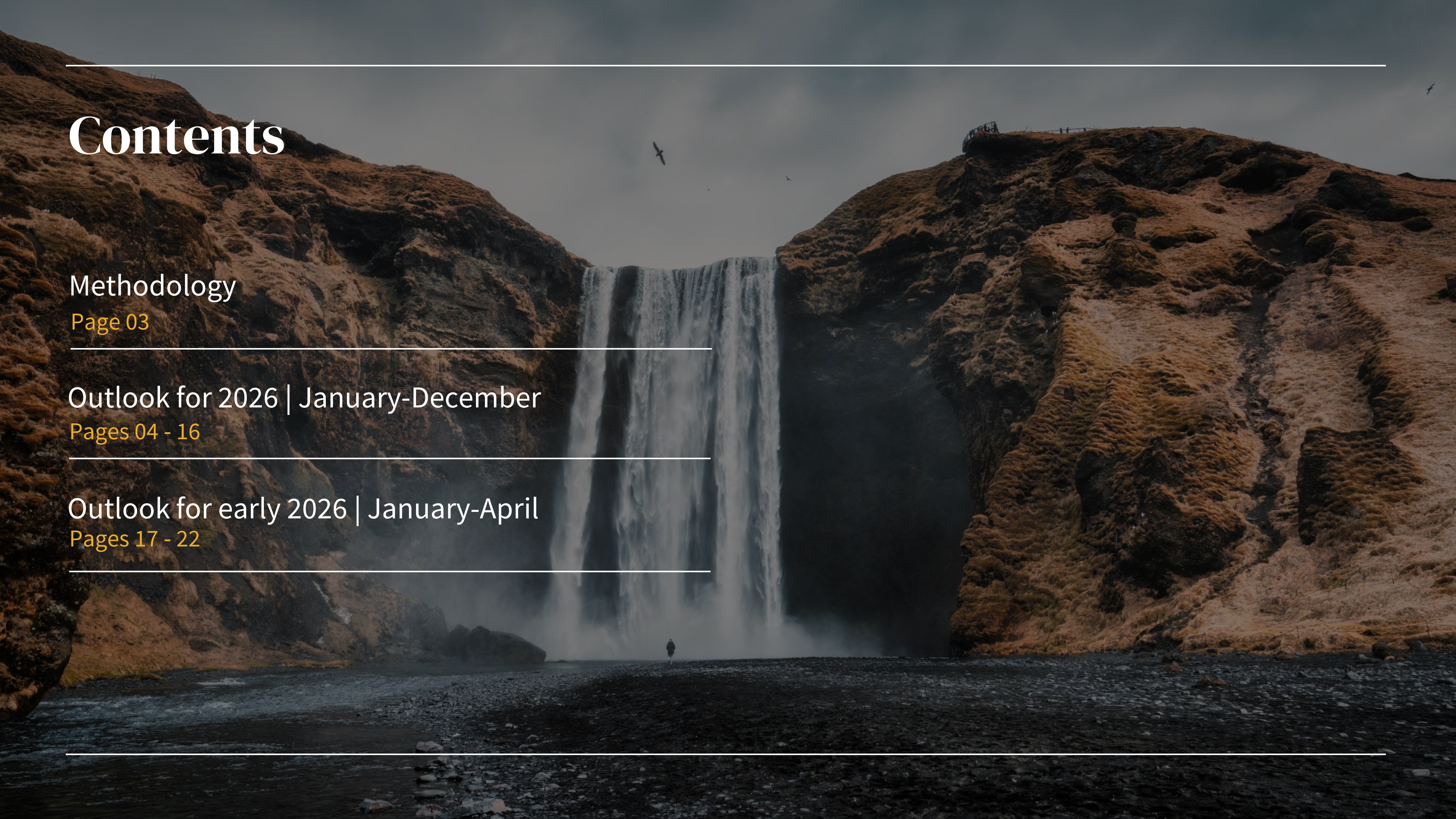

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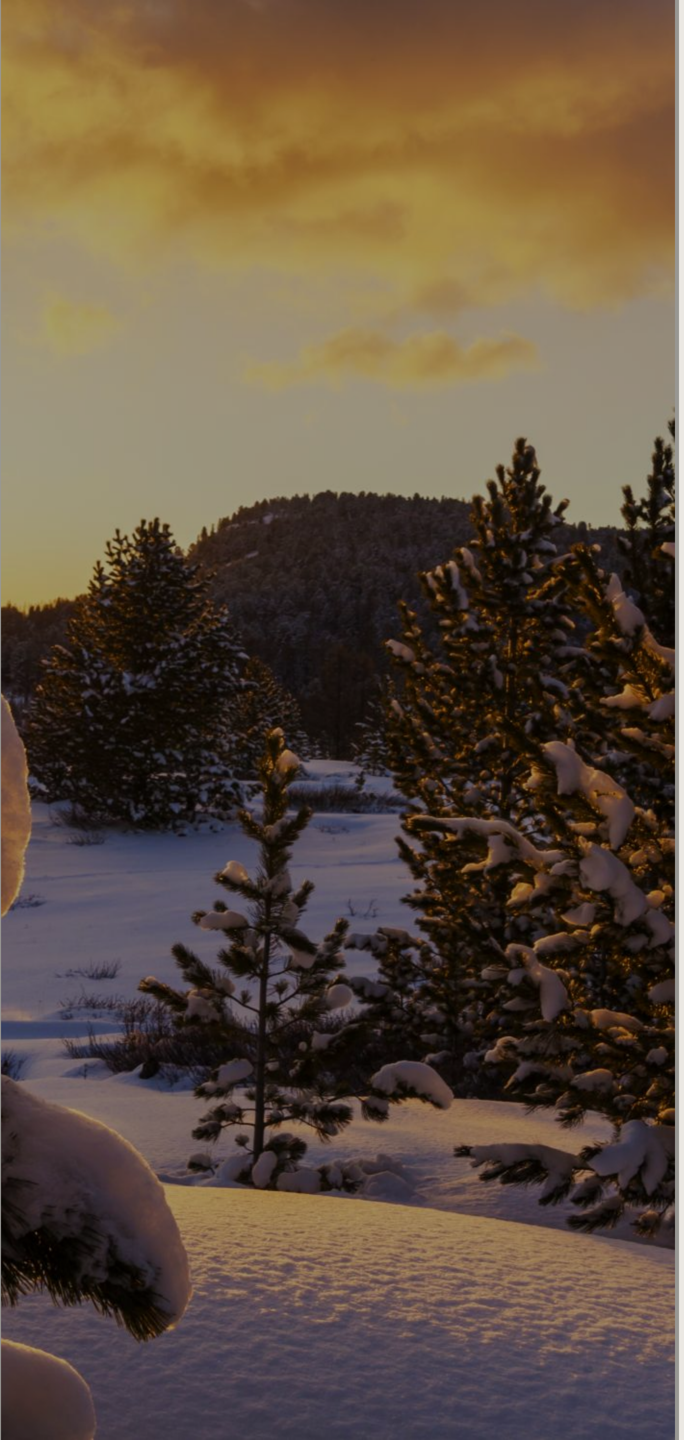


Methodology

Target

Potential travellers from Australia, Brazil, Canada, China, Japan, South Korea and the US.

Method

- 1,000 online interviews with national representatives (18-70 years old), per market, per wave.
- Data collection: 1-12 December 2025

Significant changes

The **significant year-on-year changes** are presented in percentage points, marked with the following symbols

Increase ▲ Decrease ▼

Analysed samples

January-December 2026 (12 months horizon):

- Total respondents: **7,131**
- Respondents likely to travel to Europe: **3,043**

  Australia (451), Brazil (567), Canada (459), China (667), Japan (208), St. Korea (350), US (341)
- Respondents likely to travel long-haul but not to Europe: **1,196**
- Respondents not planning to travel long-haul: **2,892**

  Australia(306), Brazil (305), Canada (365), China (312), Japan (697), St Korea (403), US (504).

January-April 2026 (4 months horizon):

- Total respondents: **7,131**
- Respondents likely to travel to Europe: 2,013

  Australia (249), Brazil (384), Canada (235), China (626), Japan (106), St. Korea (238), US (175)

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

Outlook for 2026

Travel horizon:
January-December 2026

01

Value and proximity reshape travel choices in 2026

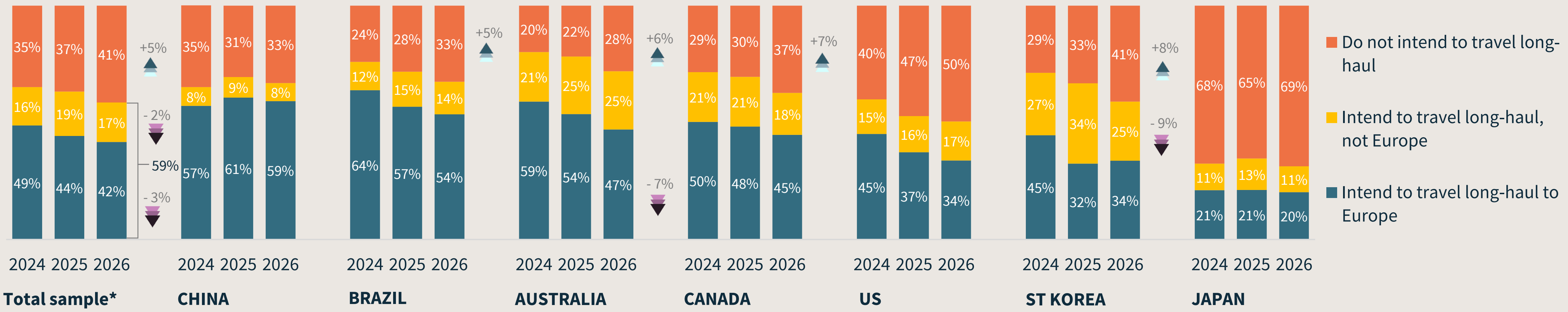
- Across key overseas markets, the overall desire to take a long-haul trip in 2026 has **notably softened (-5%)**. Australians, Canadians, Brazilians, and South Koreans are noticeably less inclined to embark on long-haul journeys in 2026 compared with 2025, reflecting broader economic and behavioural shifts. Interest in visiting Europe specifically has also declined, with **42%** of respondents indicating plans for a European trip this year— down from **44%** in 2025, suggesting more cautious travel sentiment overall.

- **China** reports the strongest intention to visit Europe (**59%**), although with a small decline (-2%) from last year's outlook. The market is maturing with travellers increasingly favouring personalised, experience-driven trips and regional options, but economic caution may be contributing to the modest dip in intent to visit Europe.

- **Brazil** maintains strong interest in Europe (**54%**) despite a modest three-point decline from last year. **High travel costs** remain a major barrier to long-haul travel in 2026 (**68%**) for this market, likely contributing to a significant shift toward short-haul and domestic trips (**+5%**). Portugal continues to stand out as the leading European destination for Brazilians (**52%**) with increasing interest.

Intentions for long-haul travel

Annual evolution (arrows indicate the significant YoY percentage point changes)*



*Minor discrepancies in totals are the result of rounding.

Value and proximity reshape travel choices in 2026

- Continuation -

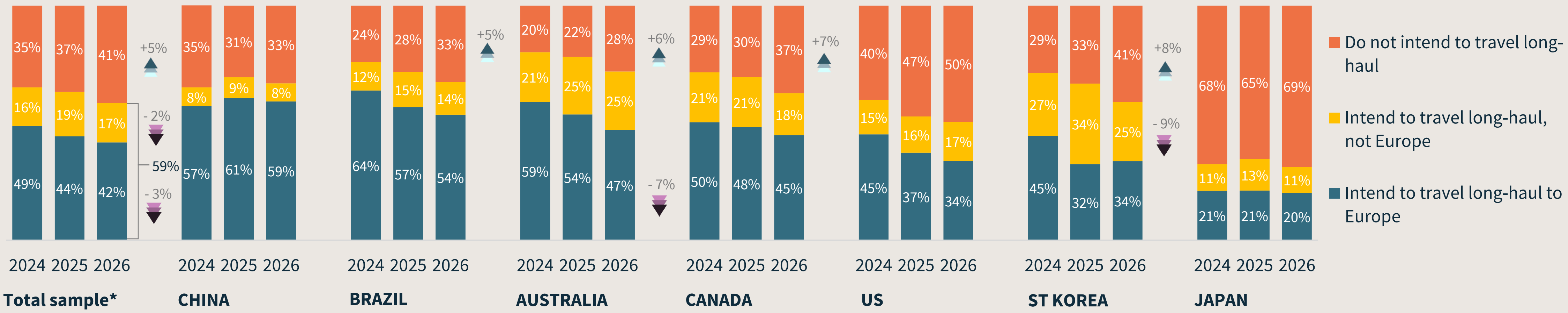
- For 2026, Europe attracts notably less interest from **Australians** (**47%, -7%**) compared to last year, as more travellers opt out of long-haul trips **(+6%)**. This shift mirrors 2025 trends showing a stronger focus on value, cultural experiences, affordability and nearer Asian markets. Similarly, **Canadian** sentiment toward Europe has edged down to **45%**, while opting out of long-haul travel has risen sharply **(+7%**) from last year. Growing demand for warm-weather (Mexico, the Caribbean) and domestic trips, especially during the winter months, indicates that affordability and perceived value are outweighing longer-haul options such as Europe.

- **U.S.** travel sentiment toward Europe has softened slightly for 2026 compared to 2025, falling to **34%**. According to several surveys, Americans continue to prioritise travel, although economic pressures and recession concerns are shifting demand toward closer-to-home destinations as they plan ahead. Similar to the US market, **South Korea** records relatively modest intentions to visit Europe in 2026 (**34%**), showing a slight rebound **(+2%**) and opting out of long-haul travel (**+8%**) this year. This shift might be due to a trend to short-haul Asian destinations like Japan, Vietnam, and Thailand, fuelled by safety and perceived value for money.

- **Japan** remains the least inclined market, with only **20%** planning a European trip in 2026, a small dip from **21%** last year, underscoring persistently cautious outbound travel sentiment.

Intentions for long-haul travel

Annual evolution (arrows indicate the significant YoY percentage point changes)*



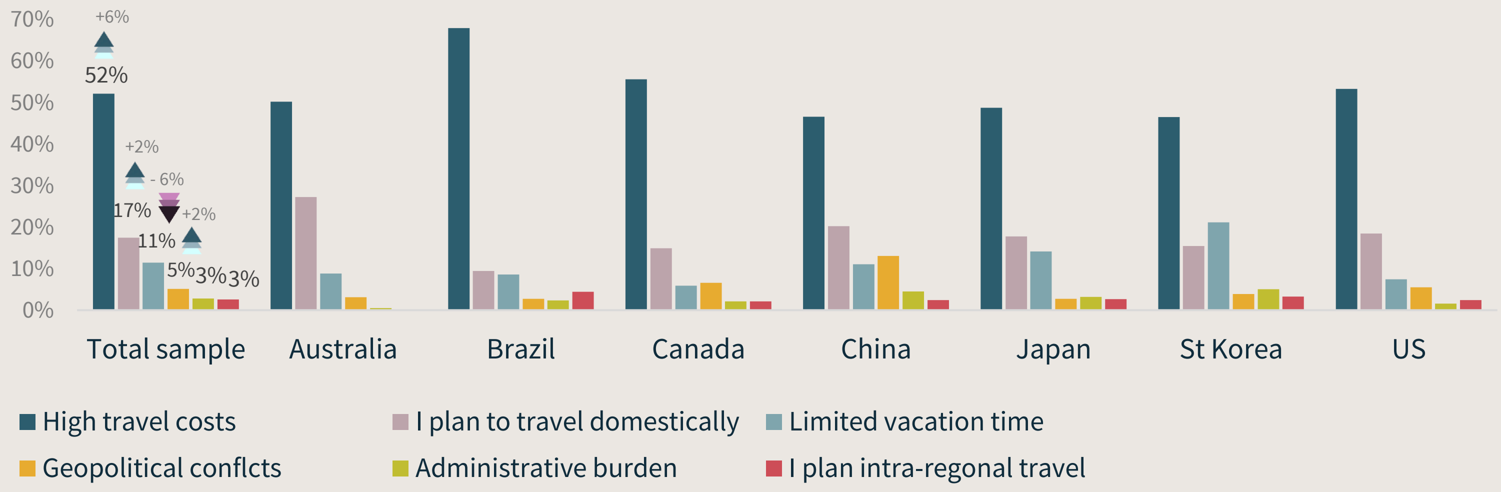
*Minor discrepancies in totals are the result of rounding.

What’s holding travellers back?

- Among respondents not planning overseas travel in 2026, **high costs** are the dominant deterrent (**52%**), followed by a growing **preference for domestic trips** (**17%, +2%**), suggesting heightened value sensitivity. In a market-to-market comparison, Brazilians emerge as the most cost-conscious market (**68%**), while Australians show the strongest desire for domestic travel (**27%**), likely reflecting more suitable local and regional options. Limited vacation time continues to constrain South Korean (**21%**) and Japanese travellers (**14%**), whereas Chinese respondents stand out for their heightened concern over geopolitical tensions (**13%** compared to 3% sample average), pointing to a greater sensitivity to global risks when planning long-haul travel.

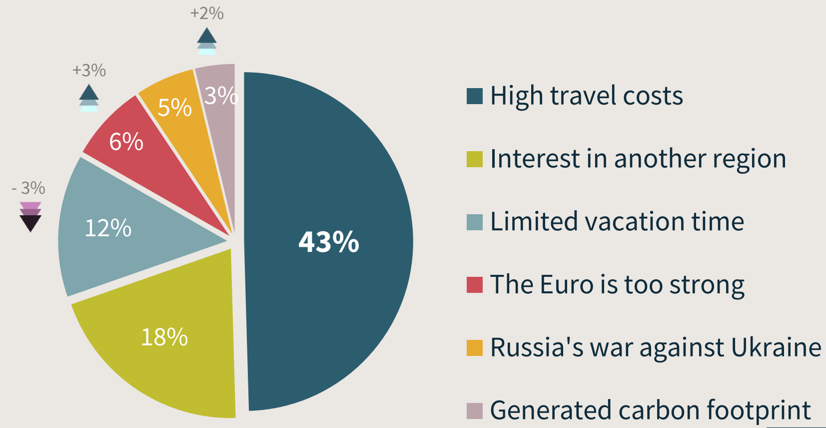
- **Affordability** remains the main barrier to travel to Europe (**43%**), weighing most heavily on younger travellers aged 18–34 (**48%**). Interest in **exploring other regions** ranks second (**18%**), particularly among older respondents (**21%**), hinting at shifting travel priorities later in life. **Limited vacation** time is cited by **12%** of respondents and has declined by **3%-points** compared to last year, indicating that time constraints may be easing. This shift presents an opportunity for European destinations to encourage longer stays, particularly by promoting flexible itineraries, slower-paced travel, and multi-stop experiences. While concerns about **geopolitical tensions** linked to Ukraine (**5%**) remain limited, a recent rise in concerns about a **strong euro** (**6%, +3%**)—alongside **environmental considerations** (**3%, +2%**)—may signal growing cost sensitivity and risk awareness as travellers plan further ahead. For **US** respondents, concerns about **feeling unwelcome in Europe** account for **7%** and rank as the fourth barrier to travel, suggesting perceptions of social climate may be influencing some travel decisions.

Barriers to travelling long-haul in 2026*



*The sample comprises **respondents not planning to travel overseas in 2026**.

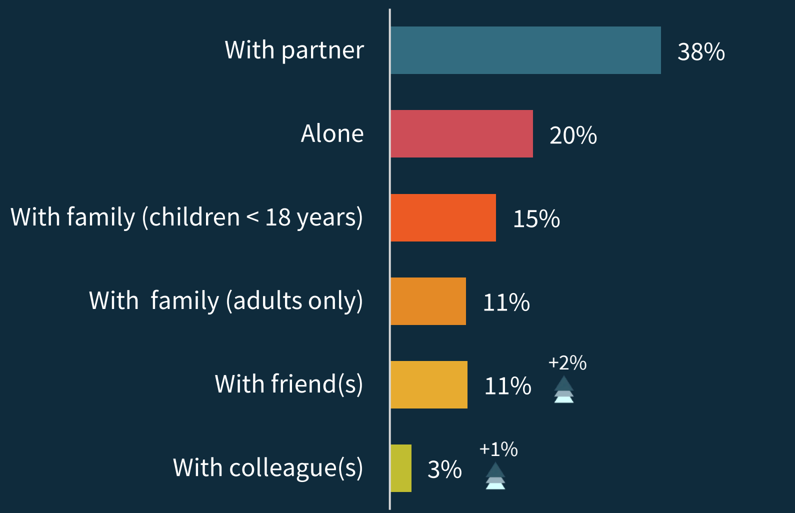
Barriers to travelling to Europe in 2026**



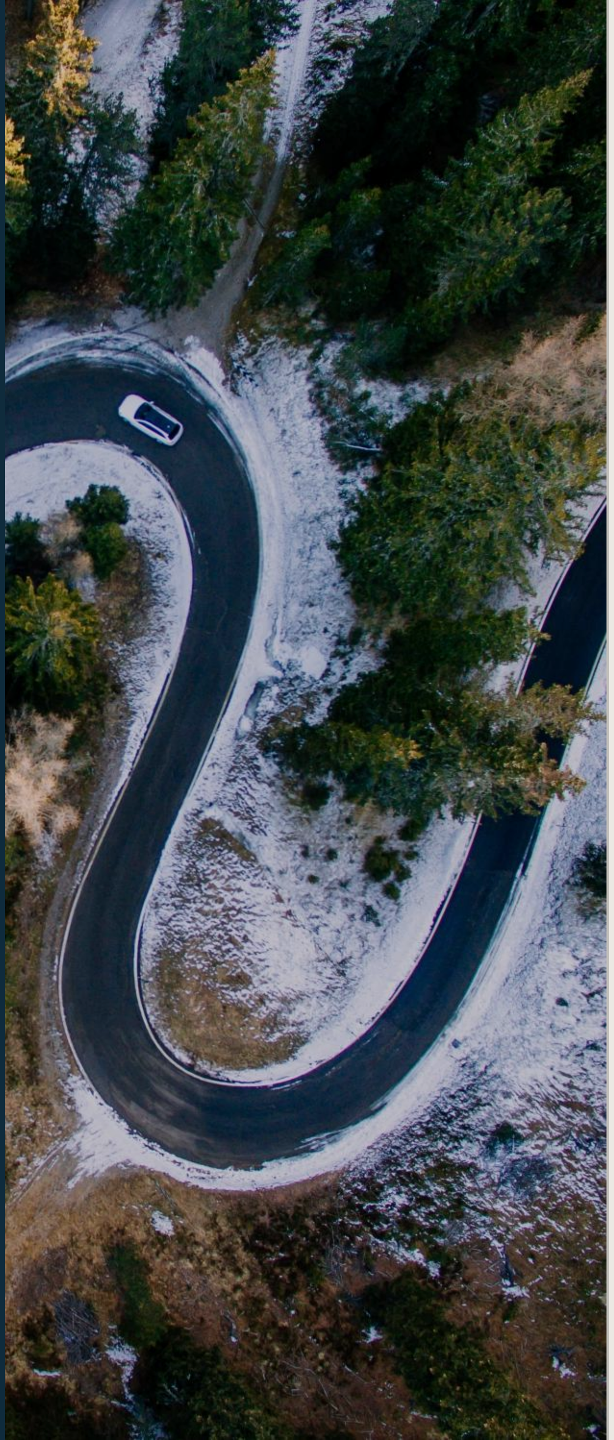
** *The sample comprises **respondents from all markets who intend to travel long-haul but not to Europe**.*

Who travels together: Partners lead, group travel rises

Travel party



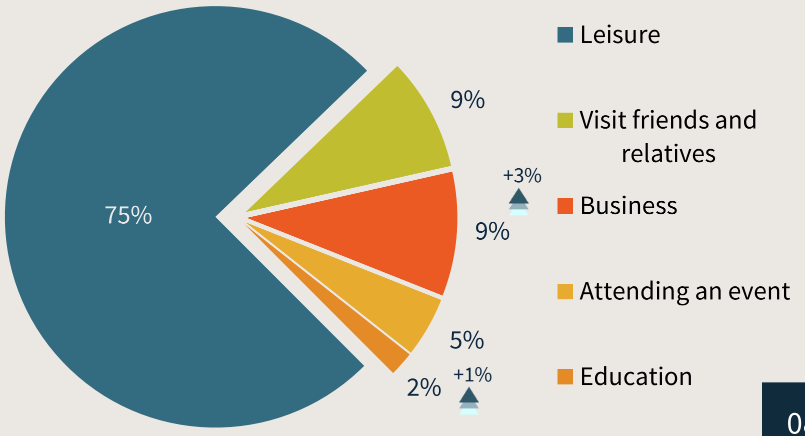
In 2026, **travelling with a partner** remains the most common choice among those visiting Europe (**38%**), followed by **solo travel** (**20%**). **Travel with friends** and **colleagues** is gaining momentum, increasing by **2%- and 1%-points** respectively. The rise in colleague travel reflects a rebound in business trips, driven largely by a notable increase from last year in **Chinese business travellers** (up from **2% to 5%).**



Work trips increase this year as leisure holds steady

Leisure remains the main reason for travelling to Europe in 2026, cited by **75%** of respondents across key markets, while **business travel** and **visits to friends and family** each account for **9%**. **Business travel** has increased significantly **(+3%**), with the highest shares coming from Australia and South Korea (both at **12%**), while leisure and VFR travel levels remain unchanged compared to last year.

Main travel purpose



36%

- 3%

have already booked their trip to Europe, a significant decrease from **39%** last year.

Shoulder-season demand strengthens

Preferred travel month

Jan-Apr (+ 3%)	59%
Sep-Dec	11%
May-Aug	12%
I don't know	18%

Most long-haul trips to Europe are planned for late winter and early spring, peaking in **March (18%),** followed by **April (16%)** and **February (14%)**. January travel has gained momentum (**10%**, **+3%** vs. 2025), suggesting growing interest in off-peak travel, likely driven by value-seeking behaviour and fewer crowds.

50+ Year-old travellers are more likely to travel in shoulder months, whereas under-50s gravitate toward peak season travel.

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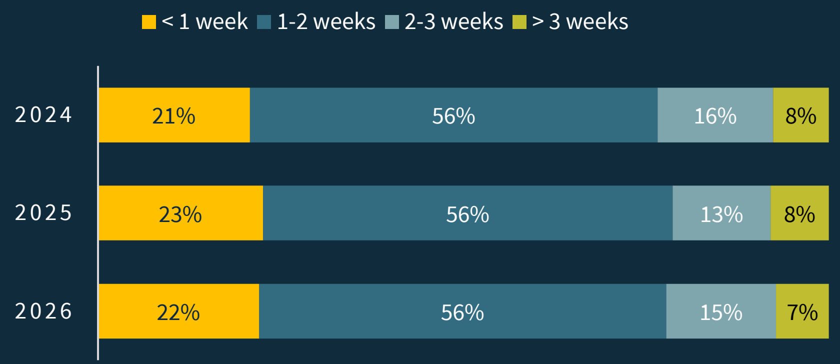
How long travellers stay and what they spend

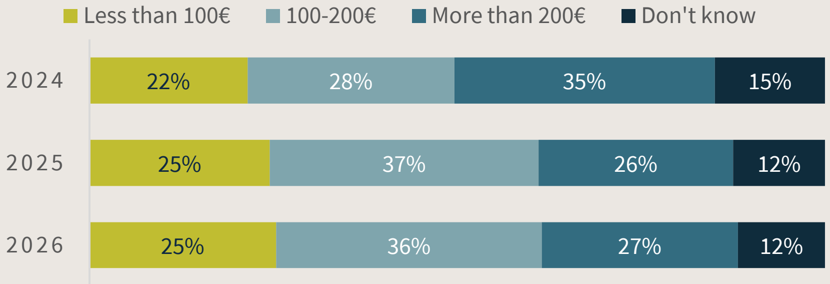
Trips of **7–14 nights** remain the most popular choice, accounting for **56%** of respondents and broadly unchanged over the last years. This year, **Australians** stand out, with a higher share planning extended stays of **2-3 weeks** (**21%**). Age also shapes trip length: **travellers under 50** are more inclined toward short breaks of **under a week**, while those aged **50+** show a stronger preference for longer stays of **2-3 weeks or longer**.

Length of stay



Most travellers expect to spend **€100–200** per person per day in Europe (**36%**), broadly in line with the last years. **China** continues to show the highest spending expectations, with over half of Chinese travellers (**52%**) budgeting within this range, followed by South Koreans (**44%**). **Brazilians** stand out as the most likely to spend **over €200** per day (**35%**), reflecting the high share of higher-income households (**72%**) among those planning a European trip this year.

Daily budget



What travellers plan to spend on in Europe this year?
Wellness gains share despite niche status

Dining is the leading spending category across all markets and chosen by **70%** of respondents. **Japanese** and **South Korean** travellers place even greater value on European cuisine (**77%** and **78%**), exceeding the overall average.

Tourist activities rank second in travel spending, valued by **51%** of respondents, with particularly strong interest among **Brazilians** (**61%**) and **family travellers** (**53%**).

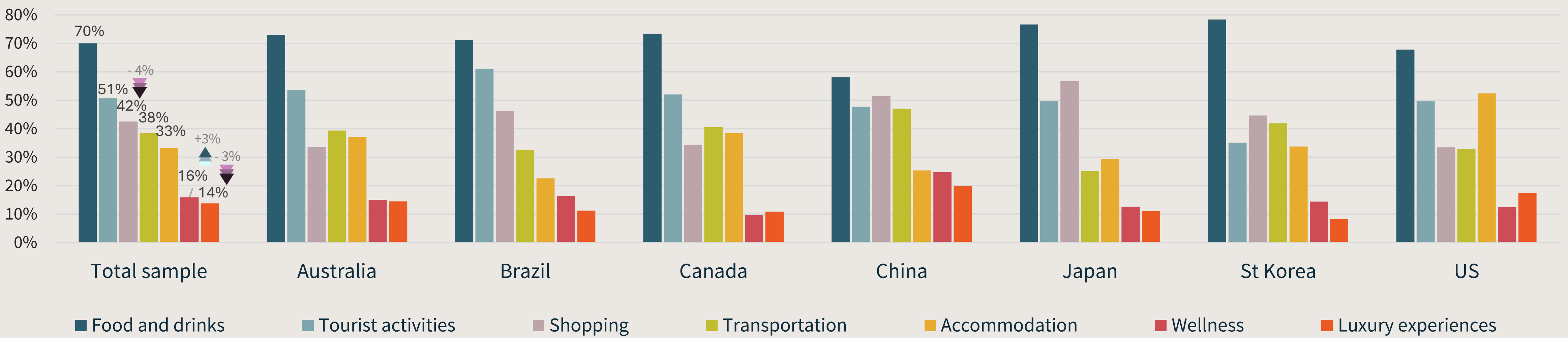
Shopping holds the third place, though interest has declined from last year, driven mainly by a drop among Chinese (from **66% to 51%).** Yet, **Chinese** and **Japanese** remain the most inclined to allocate most of their budget to shopping compared with other markets.

Transport (**38%**) is another key budget item, particularly valued by **Chinese** (**47%**) and **solo travellers** (**46%**).

Accommodation completes the top five spending categories, with **Americans** standing out—**52%** prioritise it, well above the sample average of **33%**.

Wellness and luxury remain niche spending categories, but interest in **wellness** is growing **(+3%)**, led by Chinese travellers (**25%**), while spending on **luxury experiences** has declined (**-3%**).

Which of the following categories do you expect to spend the most on during your next trip to Europe?



Type of attractions topping travellers' wishlists

44% **Urban attractions** +5%

e.g., city squares, famous shopping streets

41% **Natural attractions**

e.g., national parks, mountains, lakes

41% **Cultural & architectural landmarks**

e.g., UNESCO sites, historical buildings, modern architecture, unique design structures

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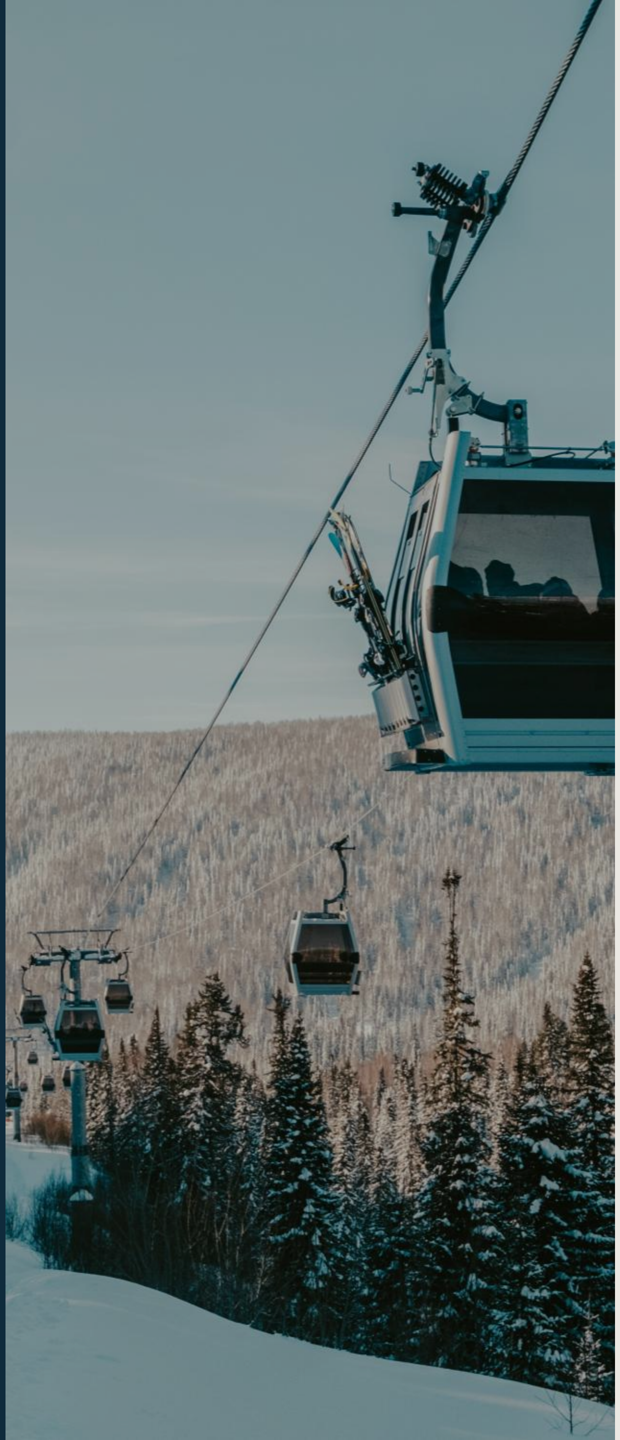


Europe's appeal: Culture, cities and slower travel

Culture and heritage resonate more strongly with **repeat visitors** (**50%**), whose interest exceeds that of first-time travellers by **11**%-points.

Most wanted activity types to try in Europe

What are the most preferred booking strategies?

Younger travellers aged **18–34** are more inclined to book their European trips through **partial** (**39%**) or **full packages** (**44%**) than those aged **50+**, who show a stronger preference for **independent booking** (**36%**).

- 4%

37% **Full package from a tour operator**

(flights, accommodation, food excursions, entrance fees, etc.)

+3%

34% **Partial package from a tour operator**

(only flight tickets, flight tickets and accommodation only, etc.)

33% **Separate bookings of different travel aspects**

(flights, accommodation, excursions, events, etc.) from various providers.

Chinese travellers continue to show the strongest preference for full package travel (**46%**), closely followed by **South Koreans** (**45%**). However, overall demand for full packages has declined significantly **(-4%)**, driven largely by a sharp drop among **Chinese** travellers, whose use of full packages fell from **74%** last year.

By contrast, interest in partial packages is rising, increasing by **3%**-points year-on-year. This shift is largely driven by **Chinese** travellers, whose preference for partial package bookings has grown by **6%**-points since 2025, reflecting an increasing desire for flexibility.

Booking travel services separately is most common among **US** (**45%**), **Canadian** and **Australian** travellers (**44% each**), all above the sample average. This preference suggests a stronger inclination toward independent trip planning in these markets, while travellers in Asian and Latin American markets appear more inclined toward packaged or partially bundled travel options.

What drives destination choice?

Destination selection criteria

Security and experiences shape destination choice

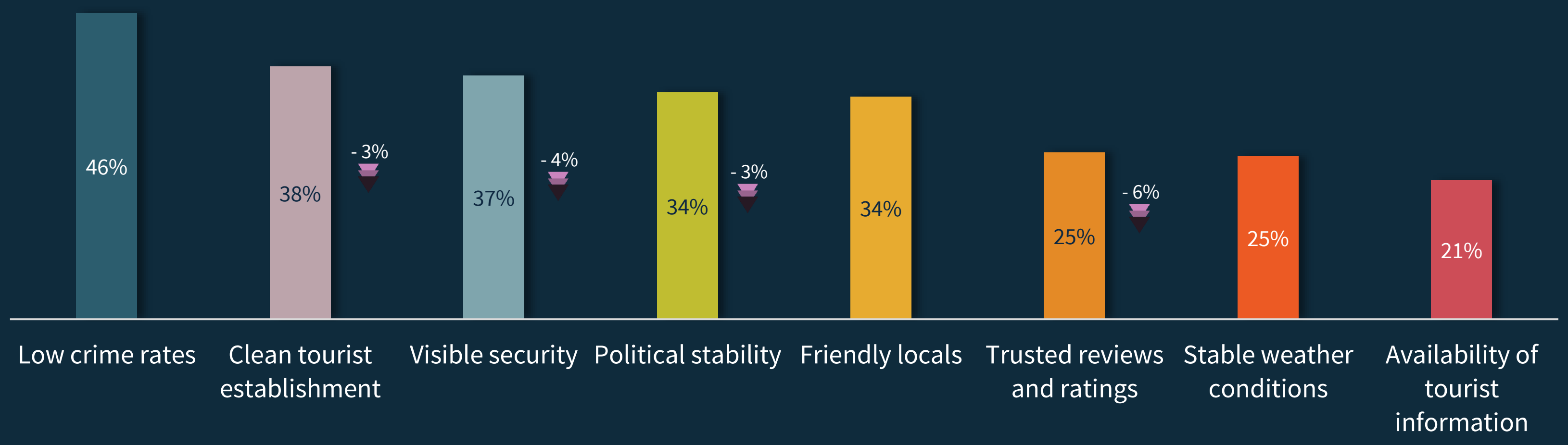
Safety is the leading criterion when choosing a European holiday destination (**51%**), rising significantly by **6%-points** year-on-year. This increase is driven mainly by **South Korean** (**56%**), **Canadian** (**53%**), and **Chinese travellers** (**45%**), while **Japanese** respondents continue to place the strongest emphasis on safety overall (**63%**).

Must-see sites rank second (**39%**), particularly appealing to travellers from **China**, **Japan**, and **South Korea**, with **47%**, **49%**, and **52%** suggesting a continued focus on iconic experiences.

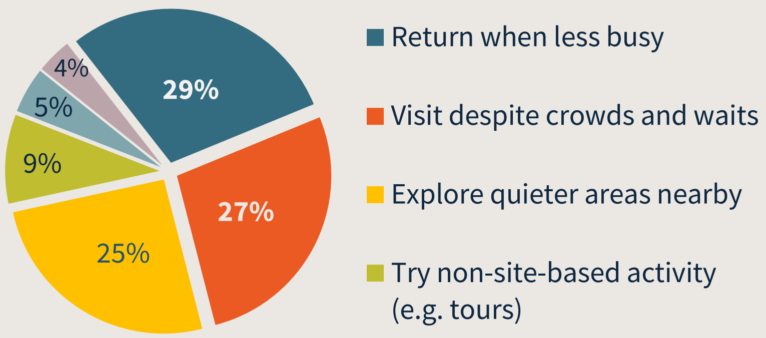
Quality tourism infrastructure comes third (**35%**), with **Chinese**, **Brazilian** (both **40%**) and **Australian** (**39%**) travellers placing greater value on reliable transport, accommodation, and accessible facilities—possibly reflecting longer stays, more complex itineraries, or a growing emphasis on travel comfort and inclusivity.

Safety and overcrowding crucial for travellers

What makes a destination safe?



What is your response if your destination spot is overcrowded?*



Overcrowding has limited impact on travel plans overall, with **27%** of travellers willing to **visit destinations despite crowds and waiting times**. However, tolerance has declined sharply among **Chinese** travellers, where willingness to visit crowded places fell significantly from **48%** to **33%**, suggesting growing sensitivity to travel comfort.

Instead of changing destinations, many travellers prefer to adapt their behaviour—**29%** would **visit at quieter times** and **25%** would **explore less crowded areas**—while only **5%** would **switch to a different destination**, indicating that flexibility outweighs avoidance.

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

Europe’s safety image in the eyes of international travellers

Perceived safety of Europe in 2026*

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

Safety confidence in Europe high, but not uniform

- Europe is widely perceived as the **safest region among global competitors**, leading across all five safety dimensions, particularly in **political stability** (**70%**), **personal safety** (**68%**), and **low exposure to natural hazards** (**63%**). Confidence is strongest among Chinese travellers.
- However, results vary across markets: **Japanese** and **South Korean** respondents express greater caution, especially around personal safety, with lower “safe” scores of **54%** and **48%** respectively, possibly reflecting higher risk sensitivity. Lower confidence among **Brazilians** around Europe’s natural hazard safety (**55%** rating it safe) highlights market-specific differences in risk perception rather than overall safety concerns.

Year-on-year comparison is not available, as this question was introduced in Wave 33.

Outlook for early 2026

Travel horizon:
January-April 2026

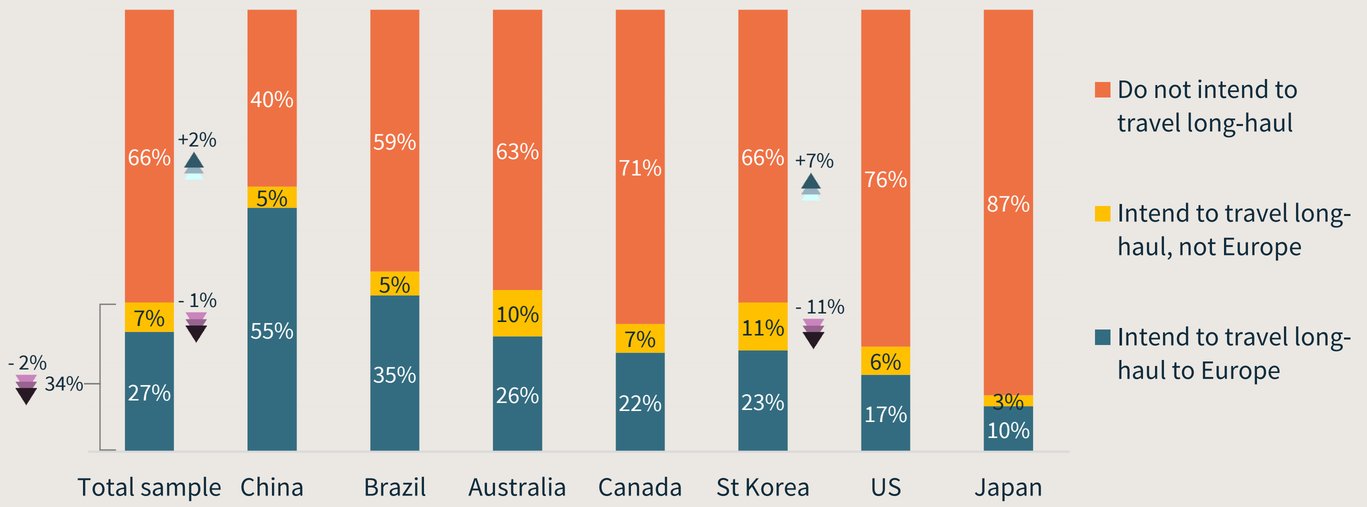
02

Short-haul travel and regionalisation grow as long-haul cools in early2026

- Short-term long-haul travel sentiment has **softened slightly**, with **34%** of respondents across key overseas markets planning a long-haul trip between January and April 2026—down **2%**- points year-on-year. With the exception of **China and Japan**, most markets show reduced appetite for travelling beyond their region, though this decline is statistically significant only in **South Korea**, pointing to growing regionalisation of early-year travel plans.
- Interest in visiting Europe over the next four months remains stable at **27%**, with little variation across markets. **China** continues to stand out with the strongest intent, as **55%** of respondents plan a European trip—unchanged from last year—suggesting resilient demand despite broader caution. **Brazil** follows at **35%** with only a marginal decline, while **Australia** records a softer outlook **(26%),** likely reflecting increased price sensitivity and preference for nearer destinations.
- Intentions to visit Europe remain modest in **South Korea (23%), Canada (22%)** and the **US (17%).** In **South Korea**, a slight rebound in Europe interest **(+3%)** contrasts with a significant shift toward short-haul or domestic travel **(+7%)** and a sharp drop in interest for other long-haul destinations **(-11%),** indicating that Europe is capturing an increasing share of the remaining long-haul demand. **Canadian** intentions are unchanged, while **US** interest has edged up only marginally **(+1%)**.
- **Japan** remains the least engaged market, with just **10%** planning a European trip—unchanged from 2025—underscoring the persistence of structural barriers such as cost pressures and limited outbound recovery.

Intentions for long-haul travel in Winter/Spring 2026

Horizon: January-April (arrows indicate the significant YoY percentage point changes)



Barriers to travelling to Europe in Winter/Spring 2026*

41%

High travel costs

Almost **one in two** 18–34-year-olds cite travel costs as their biggest barrier to visiting Europe.

21%

Visiting another world region

Interest in travelling to another world region is highest among **Australians (29%)**.

- 7%

11%

Limited vacation time

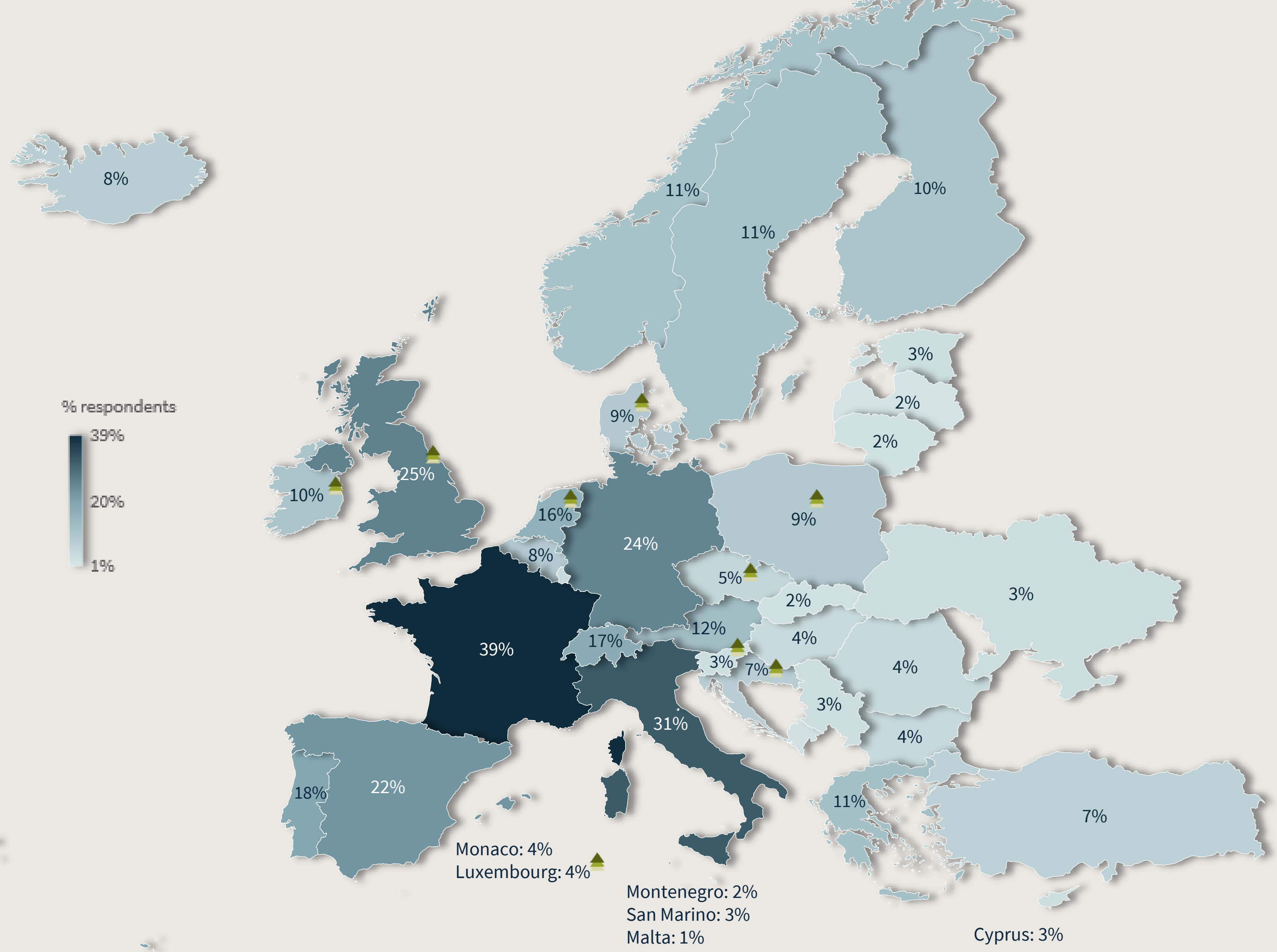
Time constraints have become less of a constraint on travel to Europe (**-7%** year-on-year).

*The sample comprises respondents from all markets who ***intend to travel long-haul** **but not to Europe***.

+5%

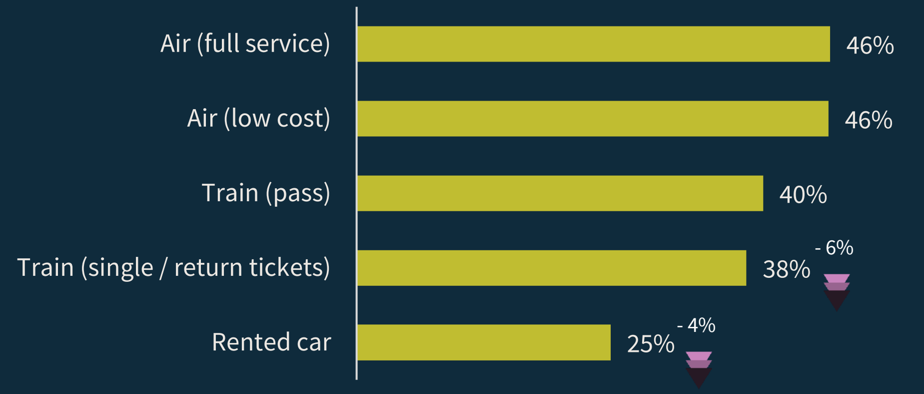
74% plan to visit more than one European country

Preferred European destinations for Winter/Spring 2026



*Significantly **more** / **less** respondents plan to visit this country compared to a year ago (January-April 2025)*

Top transport services for cross-border travel*



Flying (either full service or low cost) remains the preferred way to travel between European countries overall, chosen by **46%** of respondents, followed closely by **train travel** with a pass (**40%**).

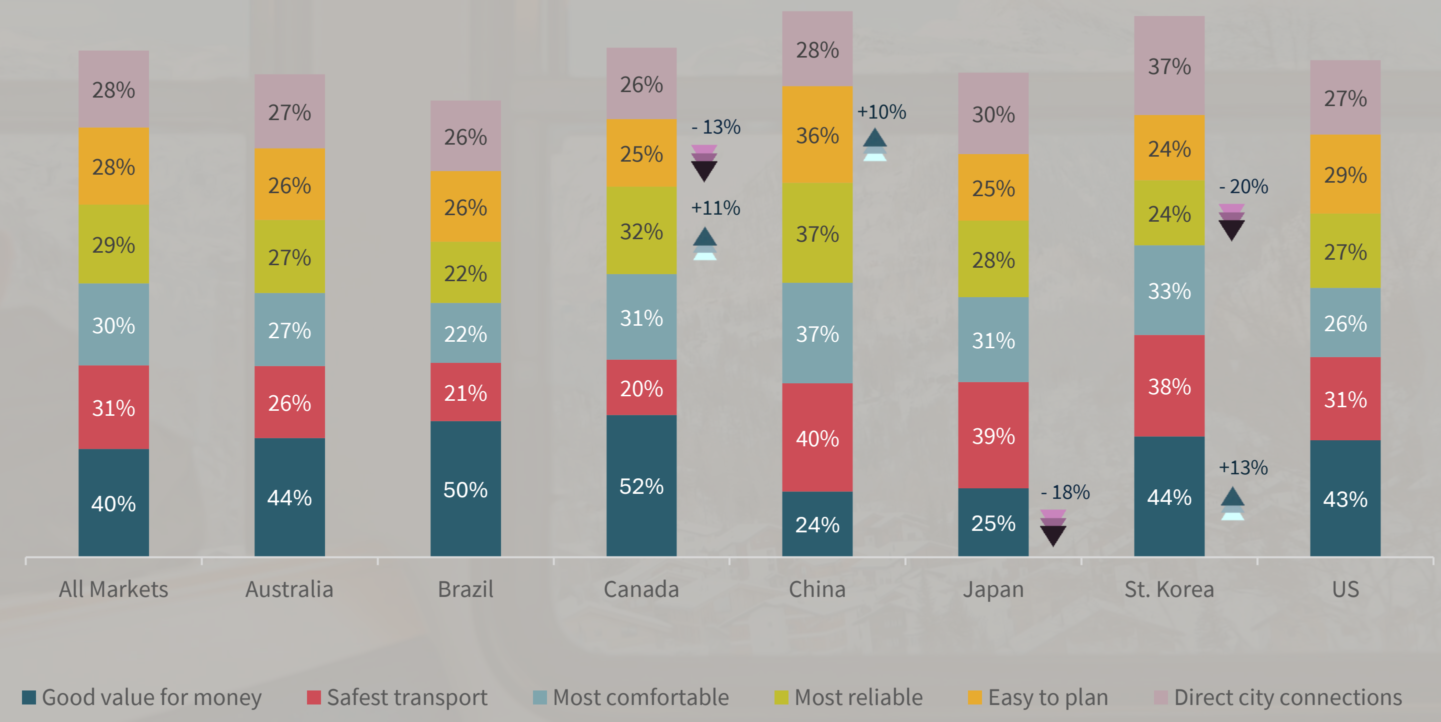
Preferences vary notably by market: **Japanese** (**54%**) and **Brazilian** (**41%**) travellers favour trains as their first choice, while **Canadian** travellers place train travel on par with low-cost flights (**39%**).

In contrast, most other markets prefer full-service flights, with **Chinese** standing out as an exception, where low-cost airlines are the top choice (**64%**).

These differences suggest varying priorities around comfort, value, sustainability, and familiarity with Europe's rail network.

**Relates to respondents who intend to travel from one country to another within Europe.*

Value, safety and comfort are key for European train travel



Across all markets, train travel is most often chosen for its **value for money (40%), safety (31%)** and **comfort (30%).**

While value remains the primary driver in most markets, **Chinese (40%)** and **Japanese travellers (39%)** prioritise safety instead. Notably, the importance of value for money has dropped sharply among **Japanese travellers (-18%),** while it has gained relevance in **South Korea (+13%),** pointing to diverging cost sensitivities.

Comfort stands out as a key motivator for **Chinese travellers (37%)** compared to other markets, while reliability has gained importance among **Canadians**, pointing to a growing focus on predictability and planning security. In contrast, **South Koreans** place significantly less emphasis on reliability **(-20%),** suggesting shifting priorities.

A similar divergence is evident in attitudes toward **ease of planning**, which has become increasingly important for **Chinese** travellers but less valued by **Canadians**, highlighting how rail choice motivations are evolving differently across markets.

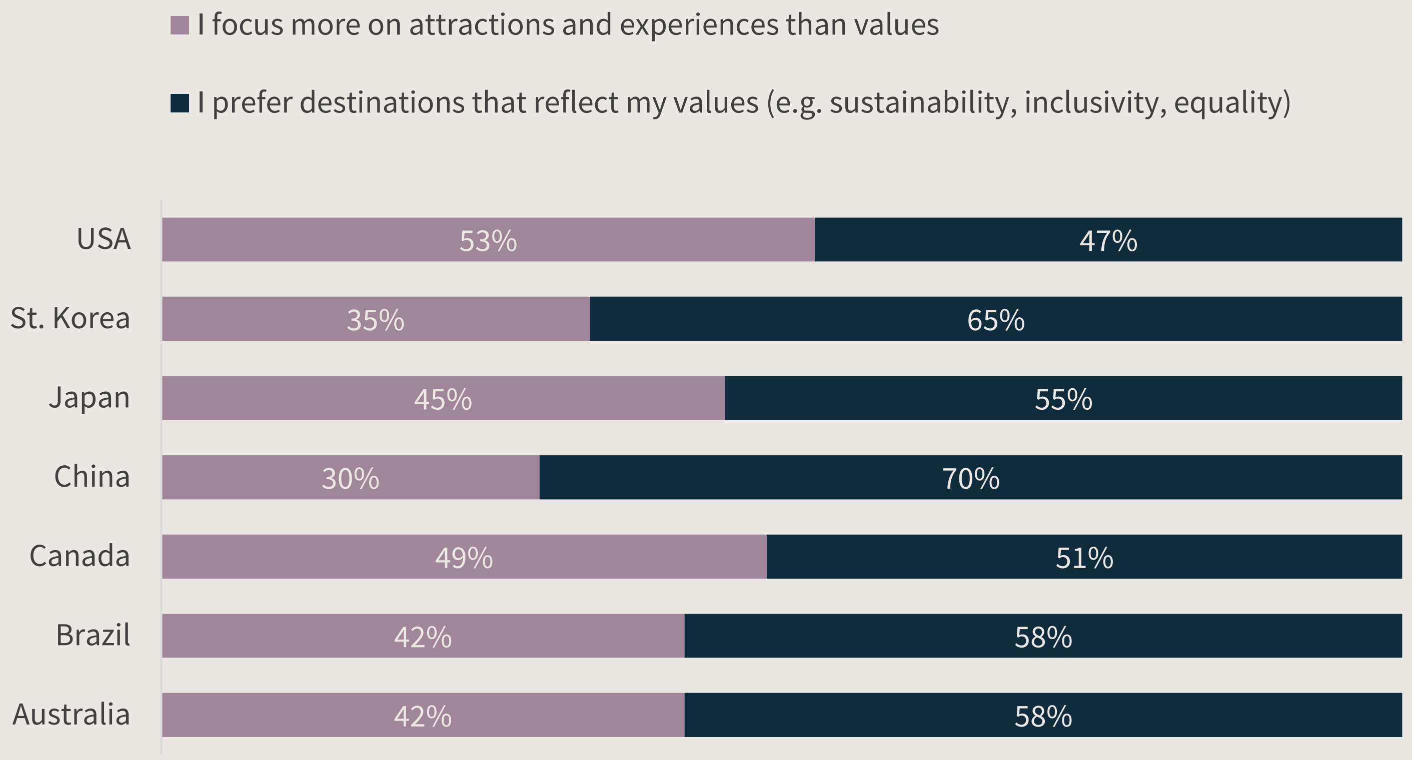
60% Personal values

Values play a particularly strong role in destination choice for **Chinese** travellers, with **70%** prioritising destinations that reflect their values over specific attractions or experiences. This values-driven mindset is also more pronounced among **younger travellers** aged **18–34 (63%),** highlighting a generational shift toward purpose-led travel.

40% Attractions & experiences

Travellers from the **United States** show a notably stronger focus on attractions and experiences compared to the remaining markets, with **53%** prioritising what they can see and do over values-based considerations.

Values matter over experiences in destination choice



Year-on-year comparison is not available, as this question was introduced in this Wave.

+4%

56% Off-season

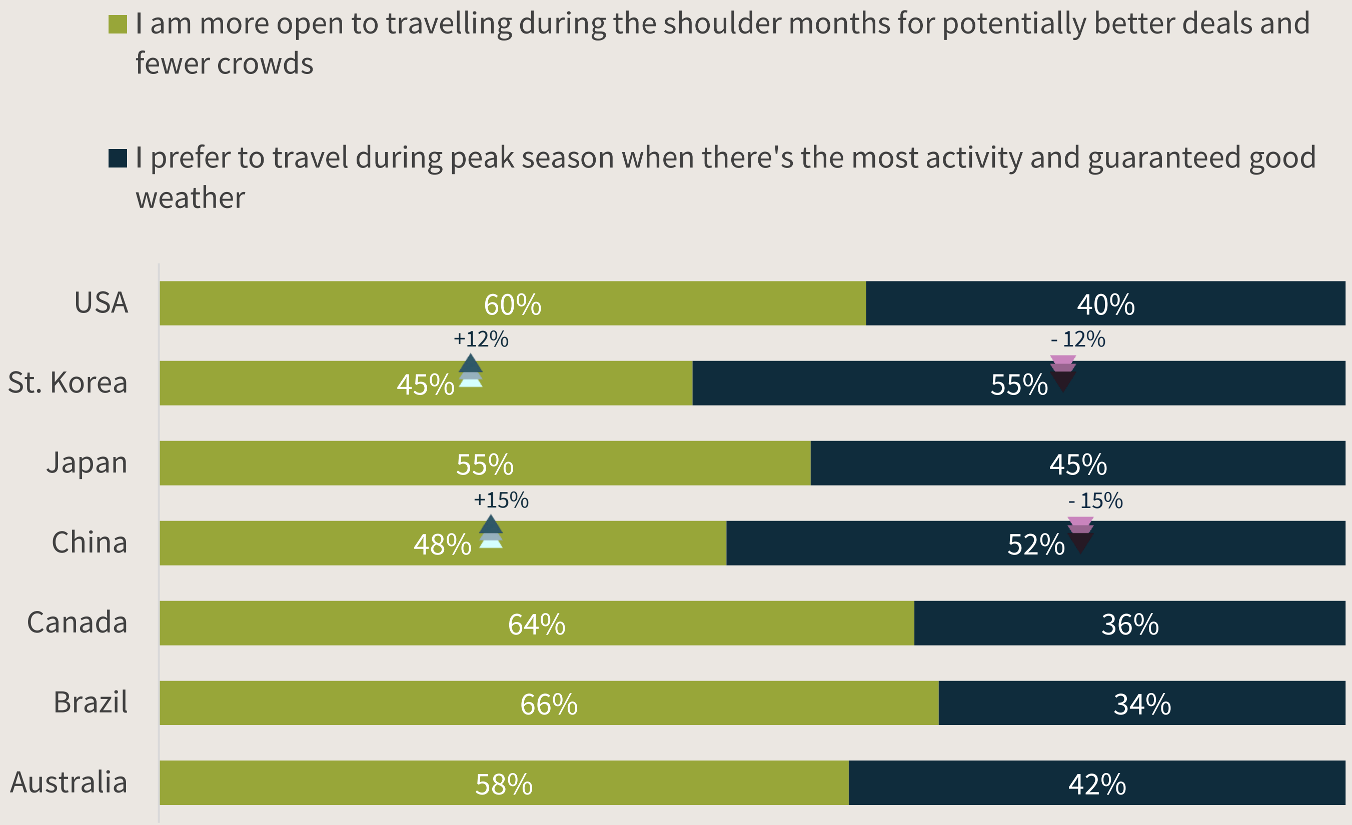
Brazilians and **Canadians** show a strong preference for shoulder-season travel, with **66%** and **64%** respectively planning trips outside peak periods. This pattern points to a greater emphasis on value, flexibility, and avoiding crowds. A similar trend is evident by age, as travellers **aged 50+** are more inclined to travel during shoulder months.

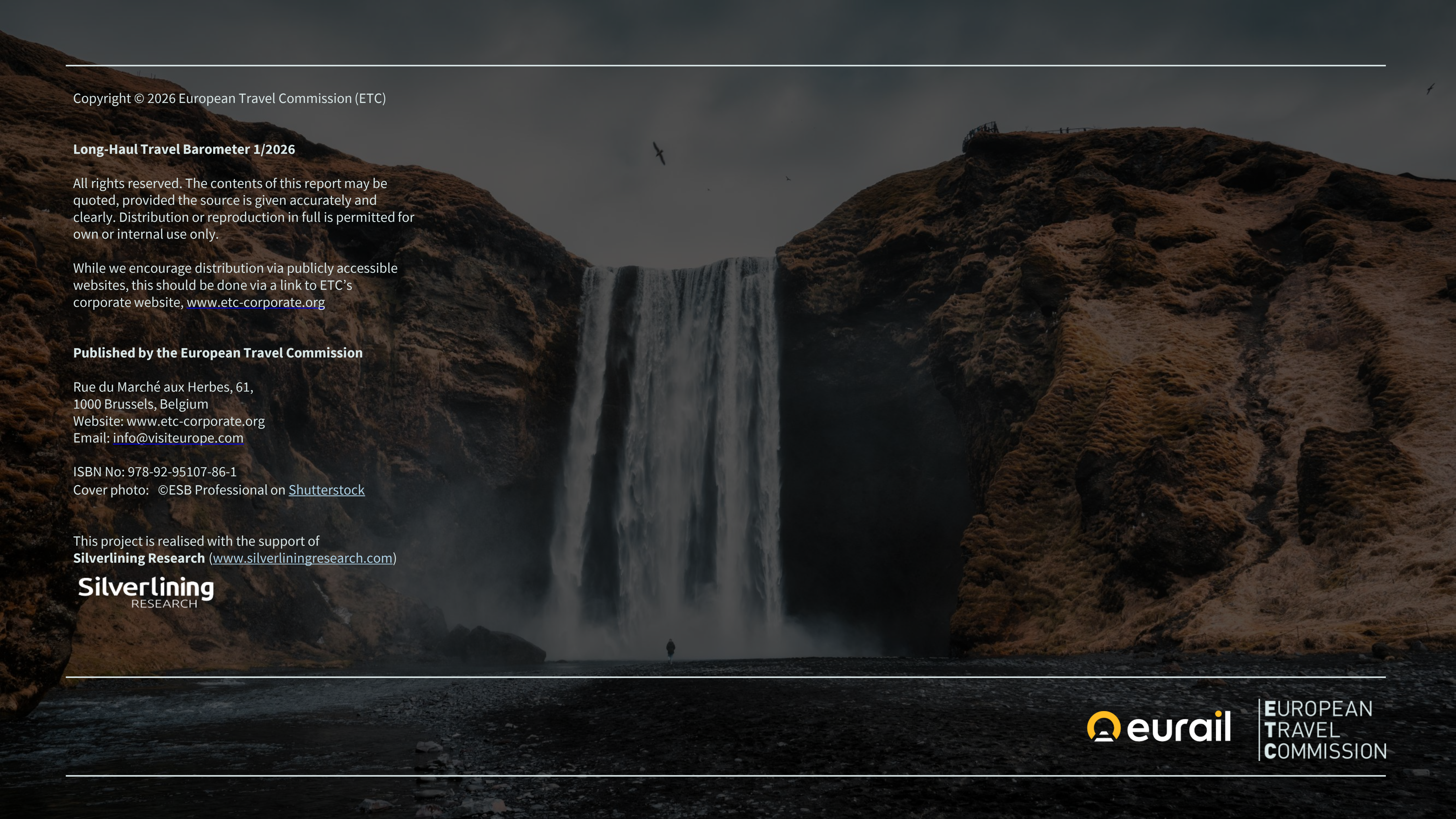
-4%

44% Peak-season

By contrast, **Chinese and South Korean** travellers are still more likely than other markets to visit Europe during the peak season (**52% and 55%),** although this preference has notably softened since 2025 alongside growing interest in off-peak travel. A similar pattern is seen among **younger travellers**, who continue to favour peak travel periods—likely driven by social travel dynamics and the appeal of major events and flagship experiences.

Age and market differences fuel growing off-peak travel





Long-Haul Travel Barometer 1/2026

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