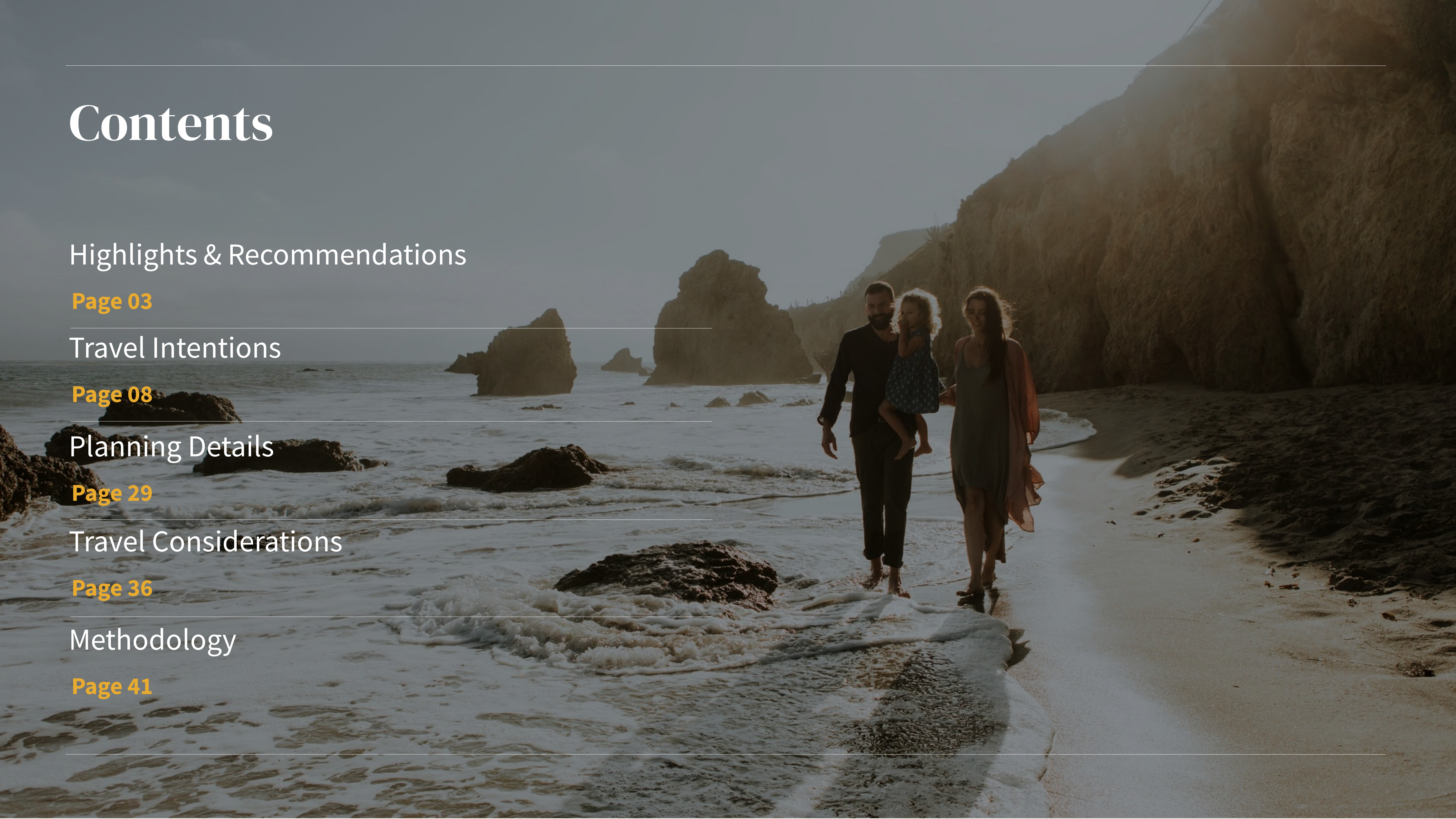
Monitoring Sentiment for Intra-European Travel

Spring & Summer 2026

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION



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WAVE 24

This report monitors intentions and short-term plans for domestic and intra-European travel.

It is the 24th update since the series began in September 2020.

The findings are based on data collected in March 2026 from respondents in 10 key European markets, focusing on their travel plans for the period April to September 2026.

EUROPEAN TRAVEL COMMISSION

TRAVEL INTENTIONS

- Europeans' travel sentiment for spring & summer 2026 climbs by 10% up to **82%, the highest level since 2020**, with May, June and July as the peak travel months.
- As summer draws near, **leisure consolidates as the primary travel motivation**, cited by 77% of respondents (+10%), while the share of those intending to travel for business drops to 4% (–4%).
- Intra-European travel prevails at 65%, but this time with **growing interest** (+4%) **in visiting non-neighbouring destinations** (32%).
- **Sun & Beach holidays** (28%) continue to maintain their position as Europeans' leading travel choice (+5%), followed by City Breaks and Culture & Heritage trips (both at 16%). The growing interest in Sun & Beach holidays is consistent with the **17% increase in the share of respondents intending to travel to Southern and Mediterranean** destinations (59%).
- Interest in **destinations Europeans perceive as less popular rises to 41%** (+6%), while intent to visit-off-the-beaten-path spots remains stable, at 10%.
- Over half of Europeans (53%) plan to stay in a single destination, while **interest in visiting multiple destinations within the same country rises to 42% (+5%)**, particularly among younger travellers

NOTE: The survey was conducted during the recent escalation of the conflict in Middle East
Comparisons vs. a year ago (March 2025)

Research highlights

WAVE 24

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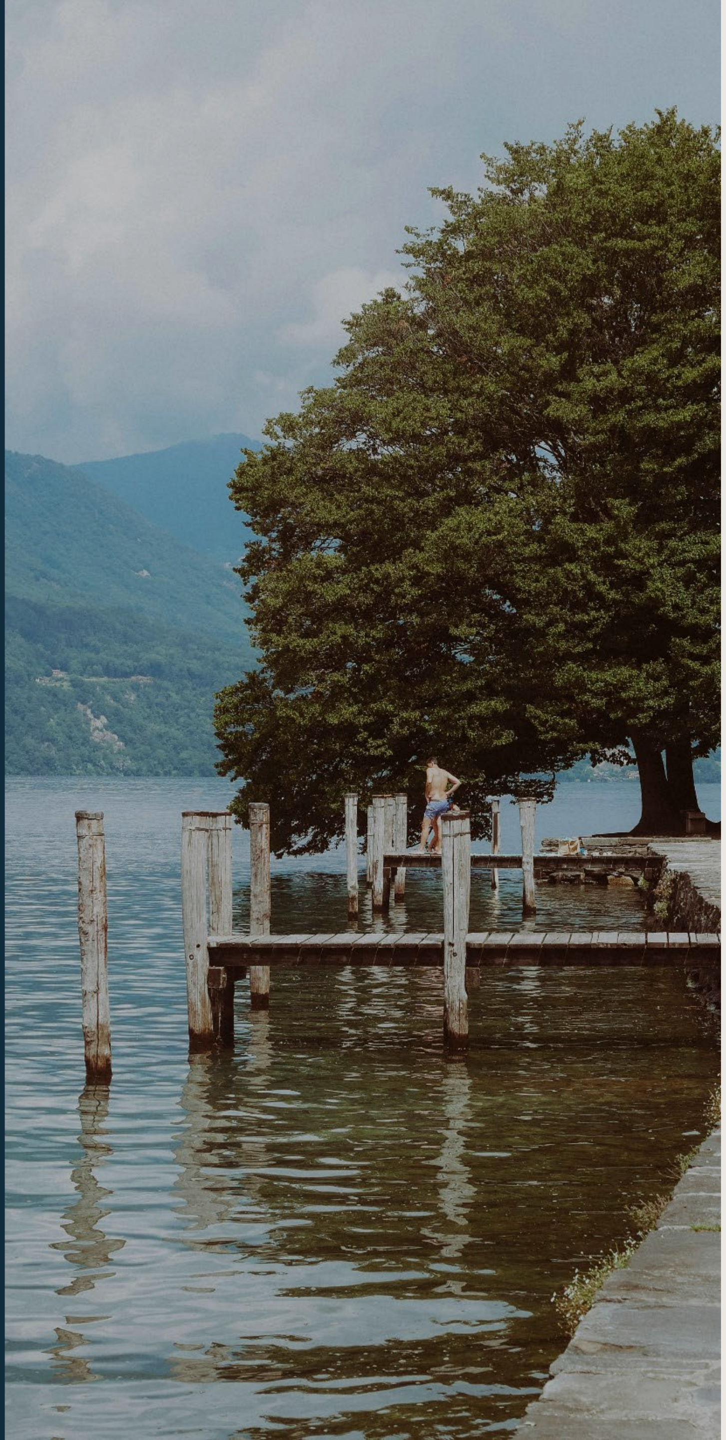


TRIP PLANNING

- **More Europeans plan to take a single trip** in the coming spring and summer (39%, +7%), while demand for two or more trips drops to 57% (–3%).
- **Shorter trips gain traction**, with 38% planning stays of 4–6 nights (+3%), while trips of 7–12 nights decline to 37% (–5%). As trip length shortens, **budgets shift towards more moderate levels**, **with those up to €1,000 increasing (+6%)**, while higher budgets above €1,500 decrease (–9%).
- Despite expectations of rising oil prices, **car travel increases to 28%** (+4%), while reliance on air travel remains stable at 55%.

TRAVEL CONCERNS AND CONSIDERATIONS

- Geopolitical turbulence drives a **4% increase in the importance of safety** as the leading destination choice **factor (22%)**, followed by pleasant and stable weather (15%), while cost-related factors also remain among the key considerations.
- **Rising trip costs are the top concern for 20% of respondents** (+3%), followed by the **potential impact of Middle East tensions** (18%), surging by a considerable +9%.
- When asked about their response to **potential climate-related disruptions** this summer, around **two-thirds of Europeans say they would adjust their travel plans**, while only 10–18% would cancel.

NOTE: The survey was conducted during the recent escalation of the conflict in Middle East
Comparisons vs. a year ago (March 2025)

Recommendations for destinations

- With travel intent at record levels, destinations at risk of overcrowding should **actively redistribute visitor flows** using tools such as dynamic pricing for key attractions, real-time crowd indicators on official apps, timed entry systems, and targeted promotion of alternative areas.
- Strategies to **stimulate demand beyond the traditional peak summer months**, particularly into October and November, should be implemented. Destinations can achieve this by developing autumn festivals and cultural events, launching targeted shoulder-season marketing campaigns, and offering off-season pricing for key sights and attractions to incentivise travel during quieter periods.
- The growing interest in less crowded destinations and multi-destination trips presents an opportunity to diversify tourism flows. In response, destinations could explore **developing integrated tourism offerings** that combine complementary experiences, and tourism boards could campaign for second-tier destinations, offering visitors the opportunity to unlock unexpected upgrades with **fewer crowds, favourable prices and more authentic experiences**.
- As safety becomes increasingly important to travellers, destinations should ensure **visible multilingual safety information** at key tourist touchpoints and establish **clear protocols between tourism operators and local emergency services**. **Proactive communication** of safety records through official channels and travel media could build visitor confidence more effectively than generic 'safe destination' messaging.
- Pleasant and stable weather is Europeans' second most important factor for the choice of destination, and destinations should further adapt by **integrating heat preparedness into tourism planning** for the summer season. This includes installing cooling infrastructure, enabling early morning and evening access to outdoor attractions to avoid peak heat, and clearly communicating these measures across booking platforms and tourism apps to maintain demand during warmer periods.

Recommendations for businesses

- As travellers shift towards shorter stays and tighter budgets, businesses should develop **flexible and price-friendly offerings**, including short-stay packages, room-only pricing, adaptive offers or more accommodating cancellation policies and value-driven bundles, while also introducing **targeted discounts, loyalty incentives and clear value-for-money messaging** to attract budget-conscious travellers.
- The rise in multi-destination travel calls for partnerships between providers to create seamless itineraries, including **multi-location packages**, **coordinated transport** and **integrated booking systems** that comprise a one-stop, hassle-free booking experience.
- Travellers aged 18–24 tend to have tighter budgets and spend less than other age groups on accommodation. Budget-friendly hotels in beach destinations can target this segment by creating a **vibrant, experience-driven atmosphere** tailored to younger travellers and effectively communicating it through social media channels.
- With climate risks influencing behaviour, businesses should **adapt operations to heat and weather conditions**, adjusting activity timings, developing indoor alternatives and applying flexible booking and cancellation policies in the event of extreme weather phenomena. On top, measures that enhance visitor comfort during elevated temperatures, and provisions for cooler months, may contribute to a **consistently positive visitor experience**, regardless of weather conditions.
- Current findings suggest a comparatively strong travel intention among younger travellers, aged 18-34. Reflecting the **needs and preferences of these segments** in service development, and considering the **relevance of communication channels**, the **emphasis on value for money**, and the **importance of flexibility in travel arrangements** may further strengthen businesses' market offering and support their competitiveness for this segment.

WAVE 24

Reading the data

Data collection periods

Wave 24	4-20 March 2026
Wave 23	6-26 September 2025
Wave 22	27 May-10 June 2025
Wave 21	3-17 March 2025
Wave 20	7-23 September 2024

Analysed samples

- Total respondents: 5,991
- Respondents most likely to travel in the next six months: 4,900
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 4,714

Travel timings for Wave 24

In the context of this report, the travel periods are as follows:

In 1-2 months:	April-May 2026
In 3-4 months:	June-July 2026
In 5-6 months:	August-September 2026

Significant changes

Changes are considered significant with a 2.5% threshold and marked with these symbols:

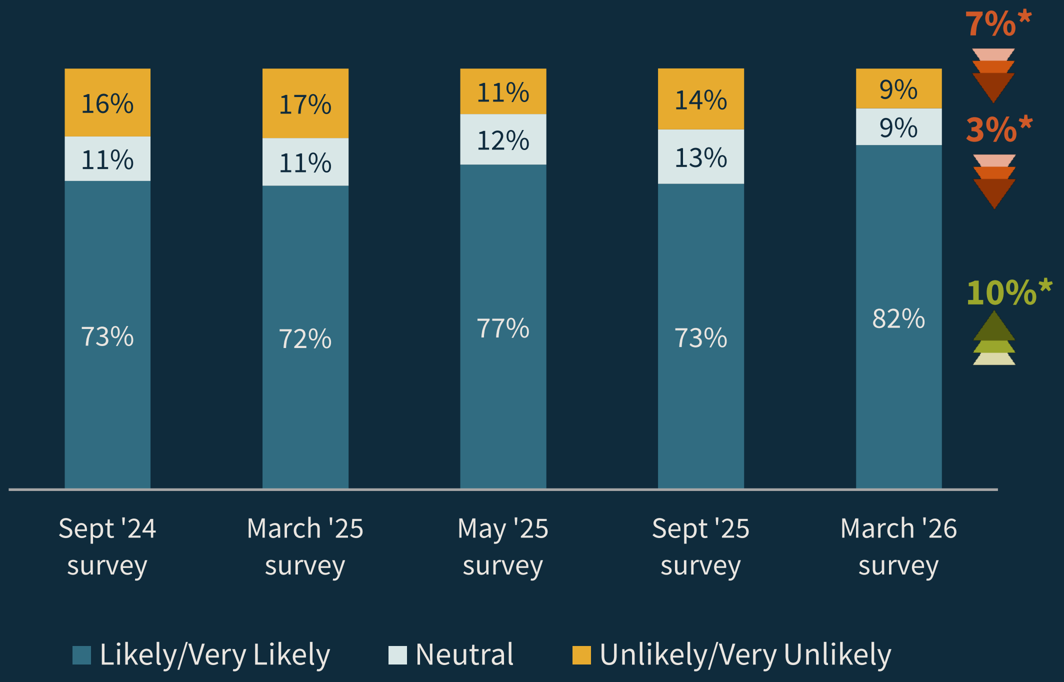
Increase ▲ Decrease ▼

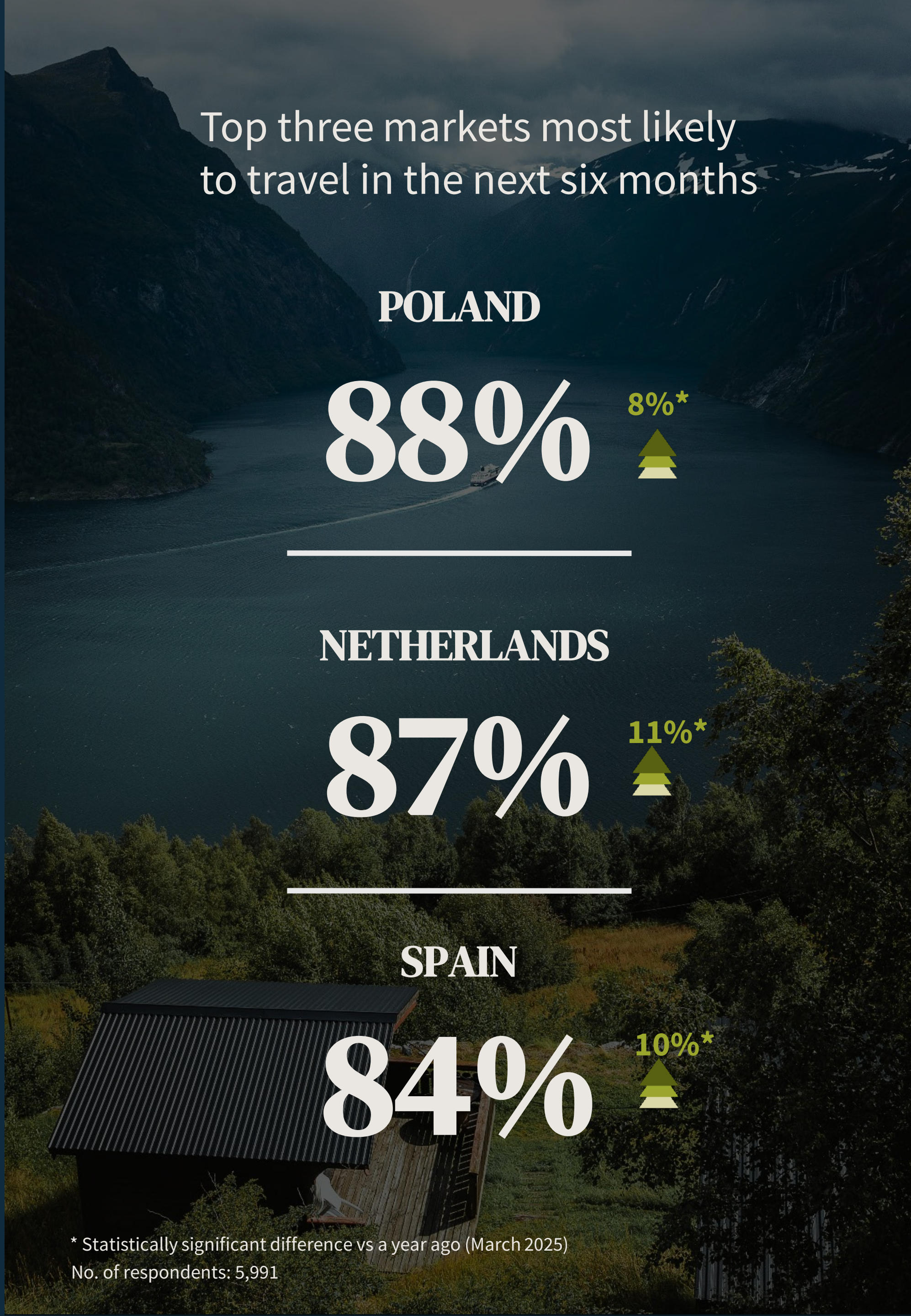
All data and insights refer to domestic and intra-European travel unless otherwise stated.

Travel intentions 01

Spring–summer travel intent hits a record high

Intention to travel in the next six months





Top three markets most likely to travel in the next six months

POLAND

88% 8%*

NETHERLANDS

87% 11%*

SPAIN

84% 10%*

Q3. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

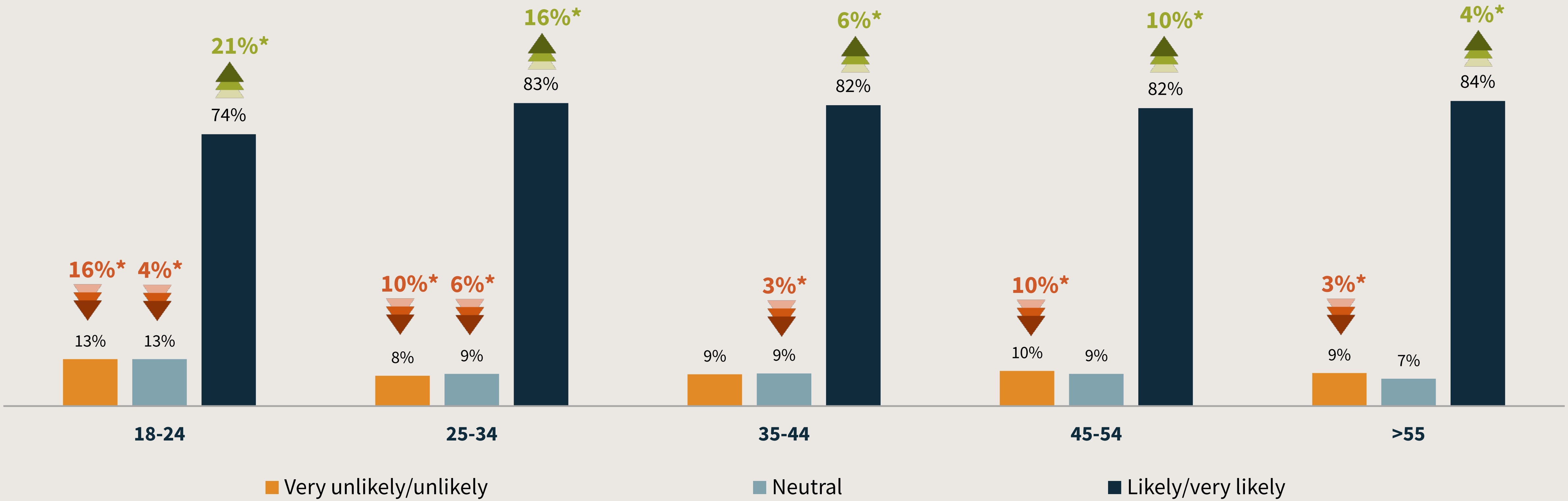
**Minor discrepancies in totals are the result of rounding

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 5,991

Travel intent is high across all age groups, with the sharpest year-on-year gains among the youngest respondents

Intention to travel in the next six months by age group



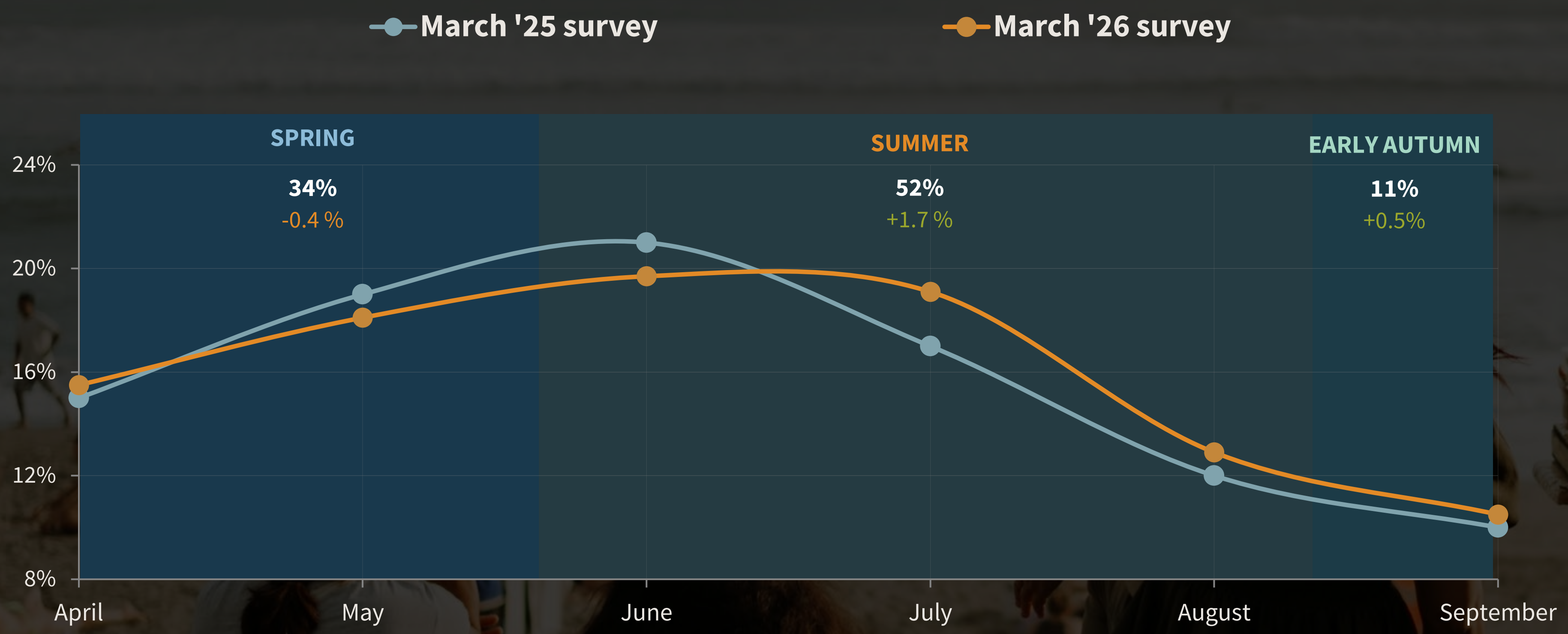
* Statistically significant difference vs a year ago (March 2025)

Q3. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

No. of respondents: 5,991

Summer travel intent is distributed more evenly between June and July compared to last summer

When will Europeans travel next?



18% of Europeans travelling in summer 2026 (June-August) prioritise lower destination costs, versus 14% of those who plan trips in spring (April-May).

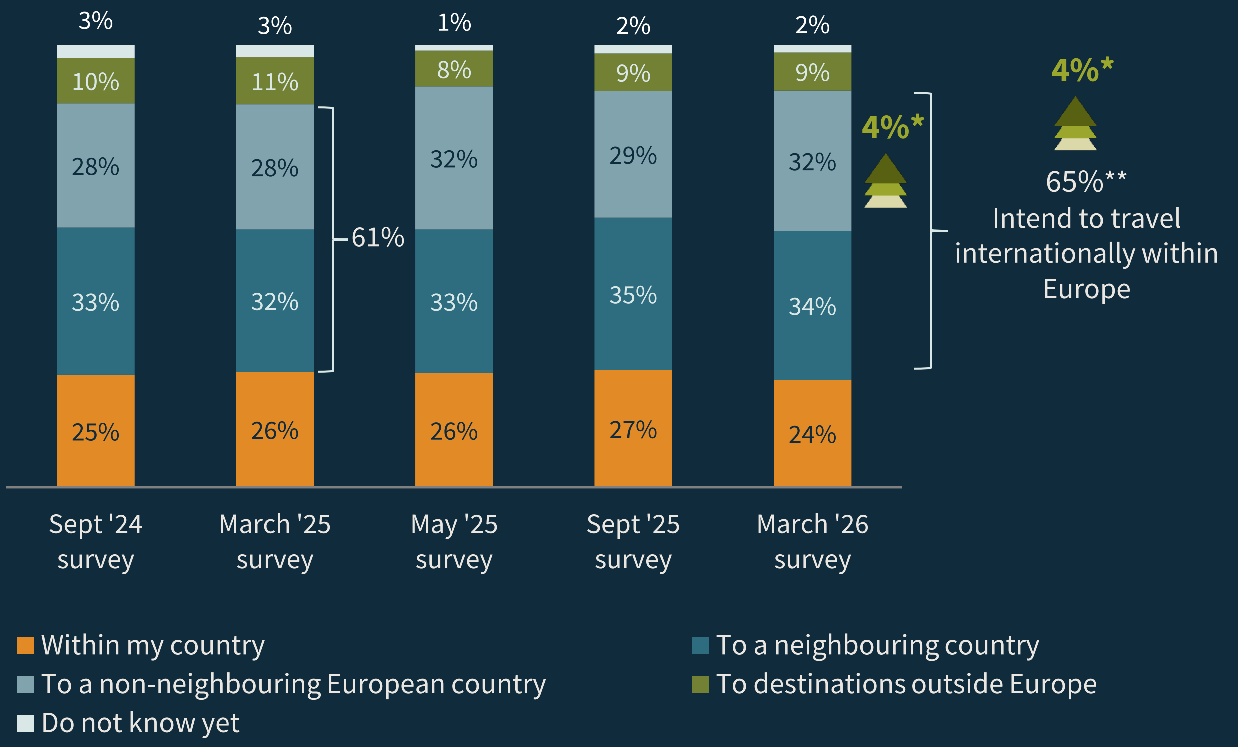
Q6. When are you most likely to go on your next trip either in your country or within Europe?

Note: Data reflect stated travel intentions collected in March 2026. Planning certainty naturally decreases for months further from the survey date; absolute monthly distributions should therefore be interpreted with caution

No. of respondents: 4,900

Interest in cross-border travel within Europe strengthens, with a growing appetite for more distant destinations

Where will Europeans travel within the next six months?



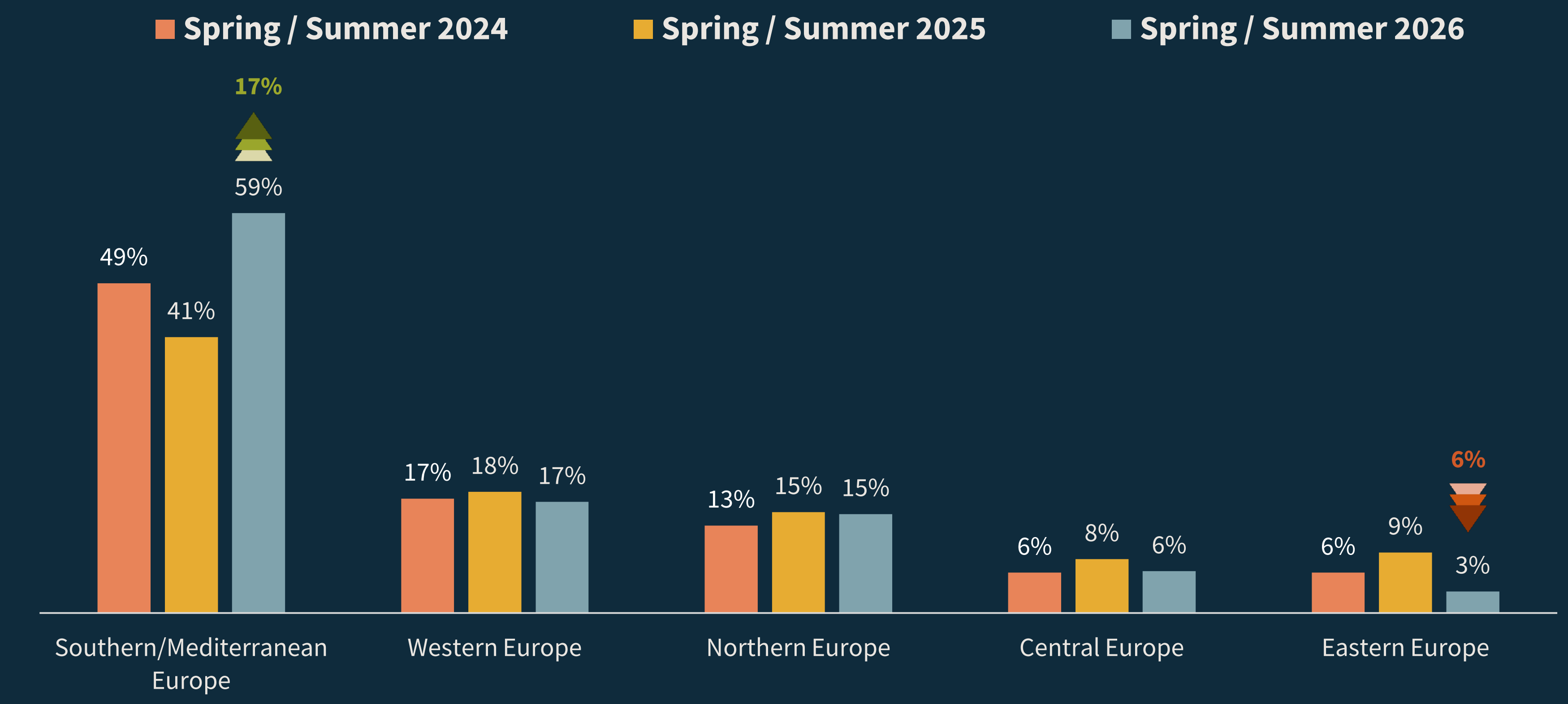
Q5. Where do you plan to travel in the next six months?

* Statistically significant difference vs a year ago (March 2025)

**Minor discrepancies in totals are the result of rounding

No. of respondents: 4,900

Southern and Mediterranean Europe see a 17% surge in holiday interest



NOTE:

Since early 2024, additional countries (Albania, Bosnia-Herzegovina, North Macedonia, Belarus, and Moldova) were included under regional groupings, making the data non-comparable with previous editions. As a result, data for summer 2022 and 2023 are excluded from this analysis.

Statistically significant difference vs the previous year | Minor discrepancies in totals are the result of rounding

Definitions of the regions can be seen in the Methodology

Q9. To which country(ies) do you plan to travel next?

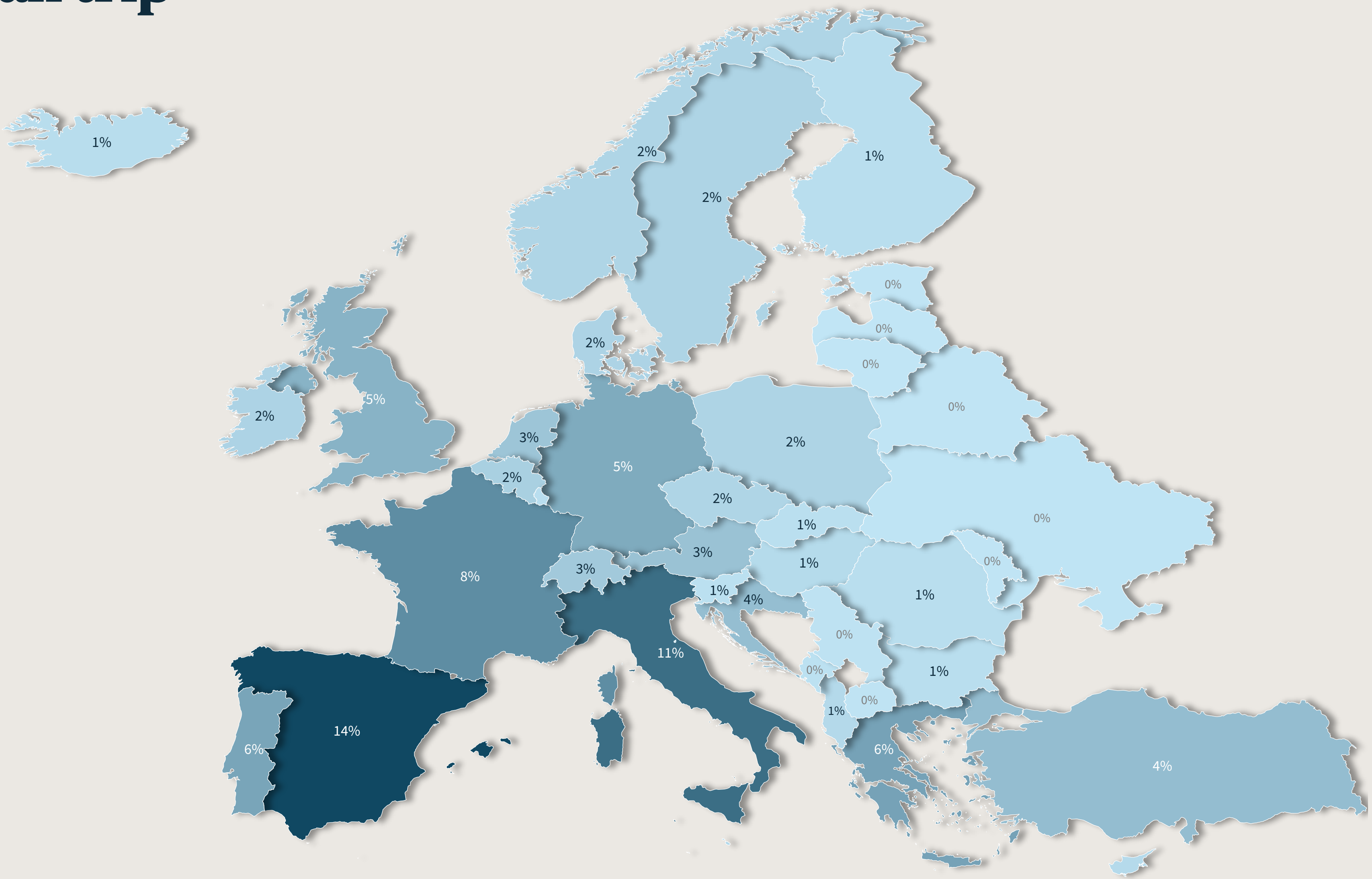
No. of respondents: 4,714

Most popular countries for the next intra-European trip

Horizon April-September ‘26

TOP 10 COUNTRIES

Spain	14%	8%
Italy	11%	5%
France	8%	
Greece	6%	
Portugal	6%	
Germany	5%	
UK	5%	
Türkiye	4%	
Croatia	4%	
Austria	3%	

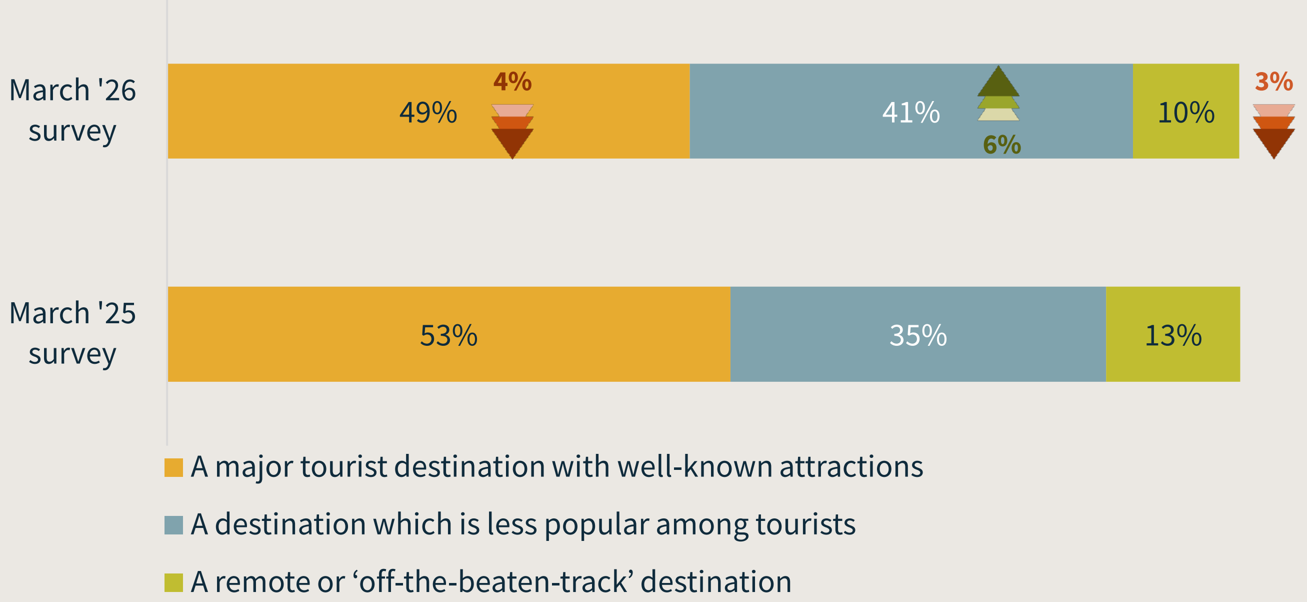


Q9. To which country(ies) do you plan to travel next?

No. of respondents: 4,714

Over half of Europeans plan to visit less popular or off-the-beaten-path destinations

Type of destination for the coming trip



Top five markets favouring tourism hotspots		Top five markets favouring lesser-known or remote locations	
Italy	58% (5% ▼)	Switzerland	63% (18% ▲)
UK	54% (3% ▼)	Poland	58%
Spain	53%	Netherlands	58% (13% ▲)
Austria	51%	Belgium	56%
France	49%	Germany	53% (12% ▲)

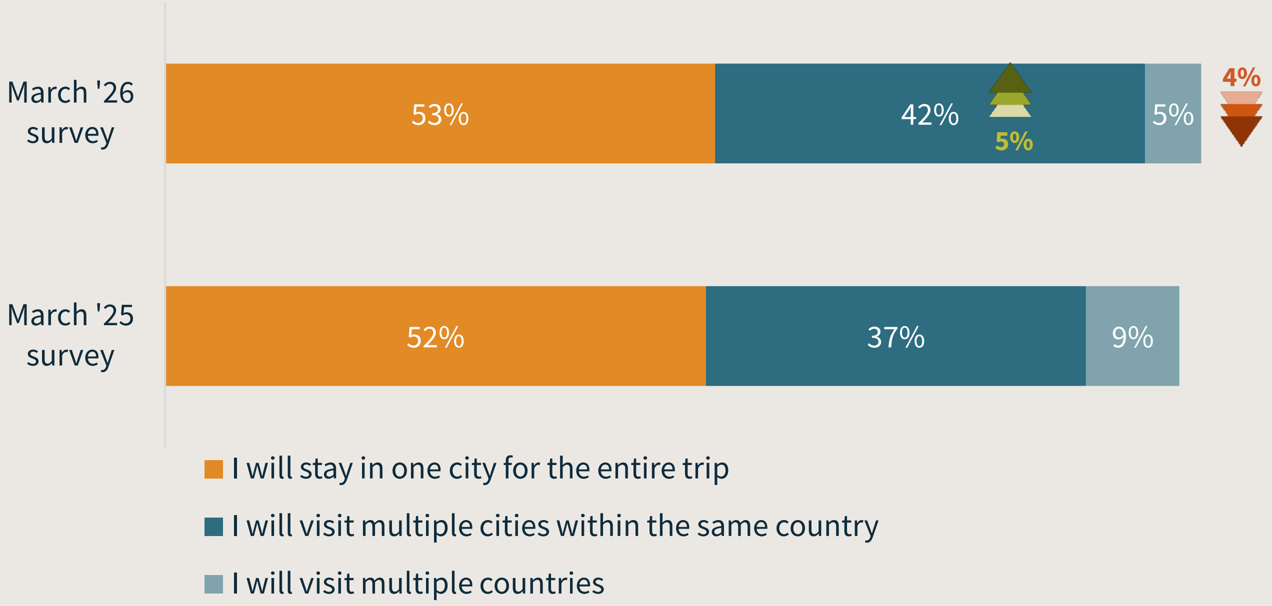
Q10. Thinking of the next country you intend to visit, in what type of destination, within it, do you plan to spend most of your time?

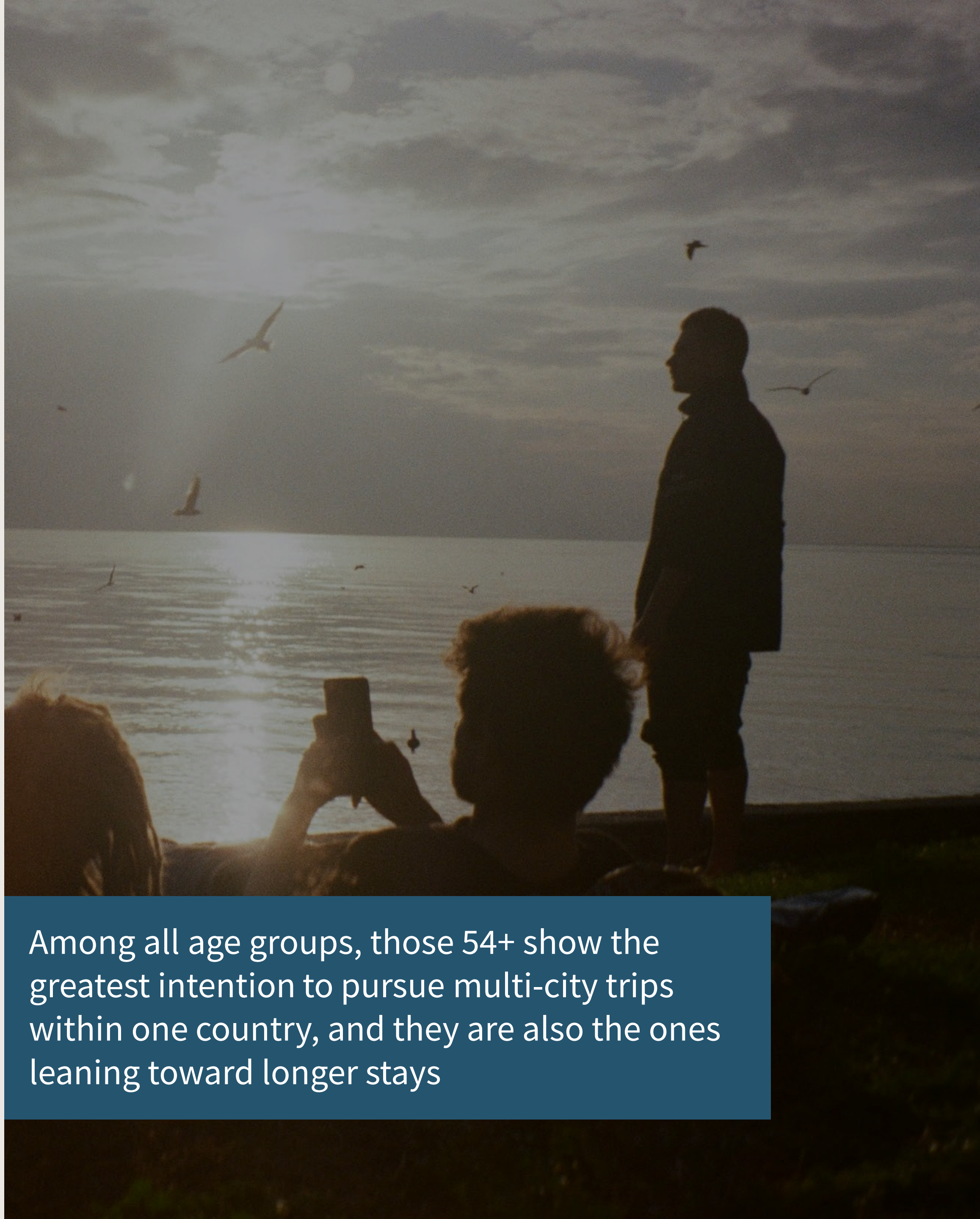
* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 4,900

From single-city stays to deeper journeys - this summer, Europeans intend to explore more within one country

Planned itinerary for the next trip





Among all age groups, those 54+ show the greatest intention to pursue multi-city trips within one country, and they are also the ones leaning toward longer stays

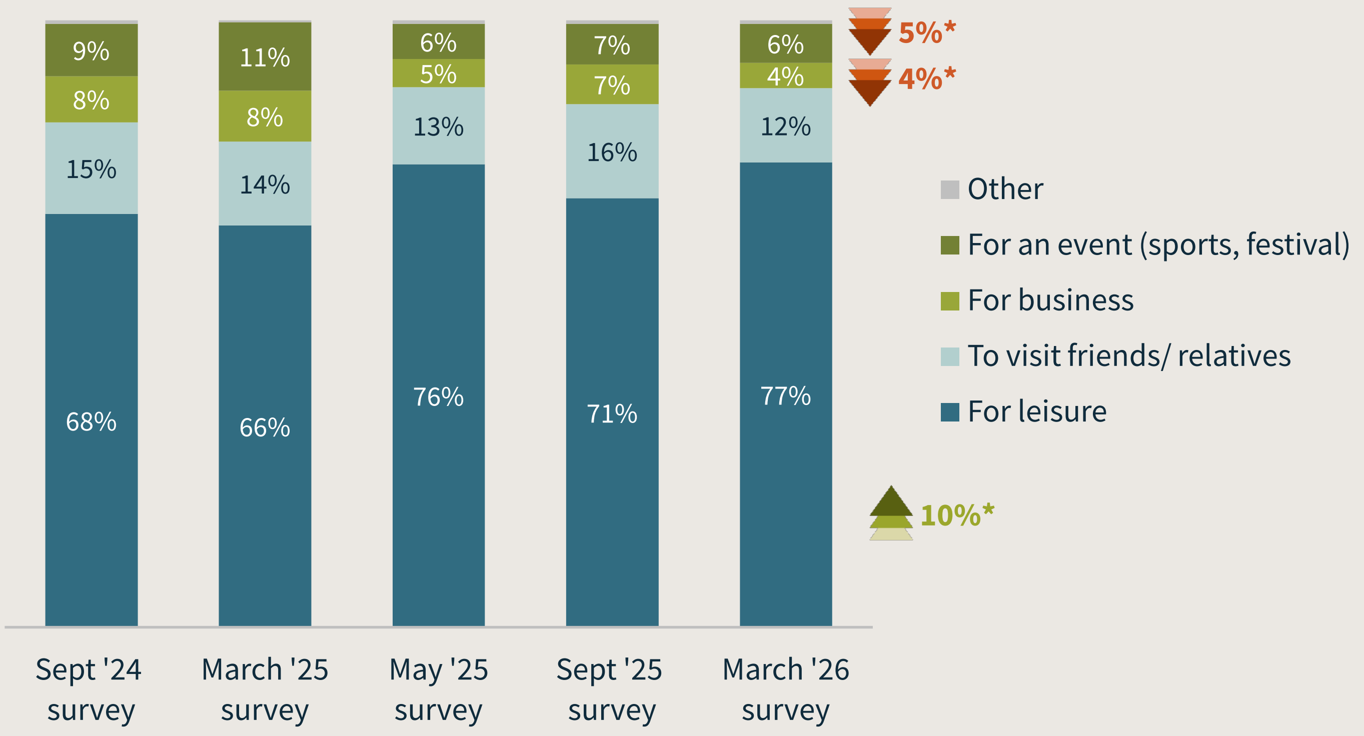
Q8. What kind of itinerary do you plan for your next trip within Europe?

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 4,900

Leisure travel surges by 10%, while plans for business and event trips decline

Purpose of travel



Q5. For what reason are you most likely to travel within Europe next?
* Statistically significant difference vs a year ago (March 2025)
Minor discrepancies in totals are the result of rounding

No. of respondents: 4,900

Top three markets to take a leisure trip	Top three markets to take a business trip
Netherlands 85% (21%*)	**Switzerland** 7% (8%*)
Italy 83% (10%*)	**Spain** 6%
Poland 81% (6%*)	**UK** 5%

Results for business trip per country are indicative due to small sample bases

Sun & Beach holidays lead demand (+5%), underlining Southern and Mediterranean Europe's rising appeal

Preferred type of leisure trip in the next six months

Europeans' interest in Sun & Beach holidays declines with age, from 32% among 18–24s to 25% among those aged over 54

Q14. What type of leisure trip within Europe are you most likely to undertake next?

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 4,900

Austrians' travel plans

Travel horizon: April-September 2026

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
March '26	78% ▲ 9%*	10%	12% ▼ 6%
March '25	69%	13%	18%
April '24	68%	12%	20%

■ Likely/Very Likely ■ Neutral ■ Unlikely/Very Unlikely

WHERE TO?

NEIGHBOURING COUNTRY	37% ▲ 4%*
NON-NEIGHBOURING COUNTRY	32% ▲ 4%*
WITHIN MY COUNTRY	19% ▼ 3%*
OUTSIDE EUROPE	8% ▼ 4%*

TRAVELLING WITH?

With partner	With family	Solo
35%	35% ▲ 6%*	14% ▲ 3%*

TYPE OF DESTINATION

A major tourist destination	50% ▲ 7%*
A less popular destination	33%
A remote, 'off-the-beaten-path' destination	17% ▼ 8%*

TOP SPENDING PRIORITIES

35%	Accommodation ▲ 6%*
22%	Food & Drinks ▲ 4%*
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
27% ▲ 7%*	38% ▲ 4%*	27% ▼ 6%*	9% ▼ 5%*

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
21% ▲ 7%*	27% ▲ 4%*	22%	19% ▼ 4%*	11% ▼ 10%*

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	15% ▲ 4%*
Spain	9% ▲ 4%*
Croatia	9%
Germany	9%
Greece	6%

** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 500 (total sample of respondents per country)

Belgians' travel plans

Travel horizon: April-September 2026

INTENTION TO TRAVEL

	Likely/Very Likely		Neutral	Unlikely/Very Unlikely	
March '26	74%	6%*	13%	13%	6%
March '25	68%		13%	19%	
April '24	70%		12%	18%	

Likely/Very Likely · Neutral · Unlikely/Very Unlikely

WHERE TO?

NEIGHBOURING COUNTRY	40%	9%*
NON-NEIGHBOURING COUNTRY	34%	5%*
WITHIN MY COUNTRY	15%	7%*
OUTSIDE EUROPE	9%	6%*

TRAVELLING WITH?

With family	With partner	Solo
42% (12%*)	35% (3%*)	11%

TYPE OF DESTINATION

A major tourist destination	45%	
A less popular destination	45%	8%*
A remote, 'off-the-beaten-path' destination	10%	7%*

TOP SPENDING PRIORITIES

27%	Accommodation	5%*
25%	Food & Drinks	7%*
17%	Activities at the destination	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
16%	28%	44%	12%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
14% (7%*)	25% (9%*)	23%	25% (5%*)	13% (10%*)

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
France	22%	8%*
Spain	12%	7%*
Italy	11%	4%*
Greece	7%	
Netherlands	6%	

** Based on total sample, without reference to domestic trips

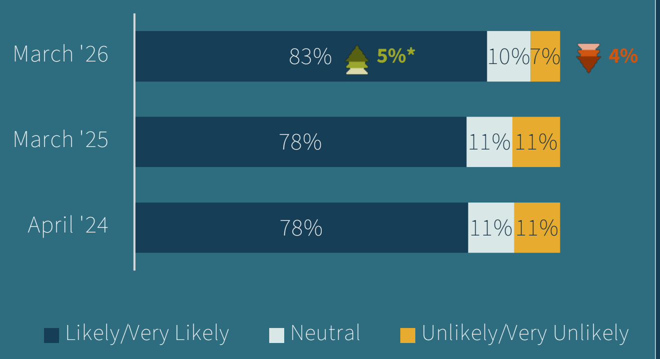
* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 500 (total sample of respondents per country)

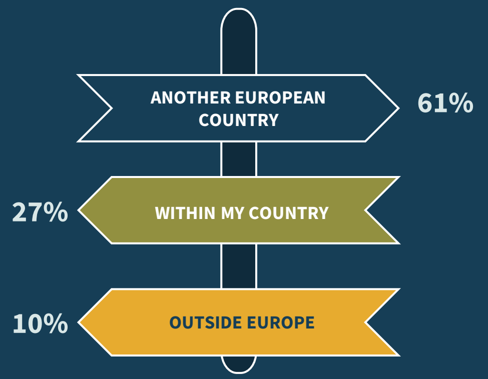
Britons' travel plans

Travel horizon: April-September 2026

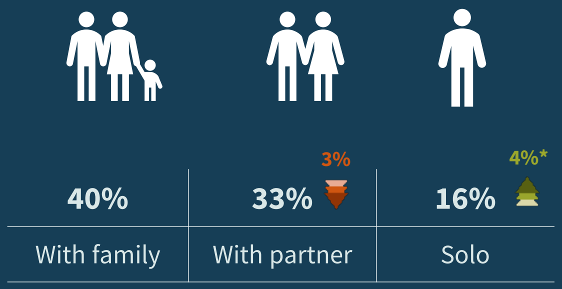
INTENTION TO TRAVEL



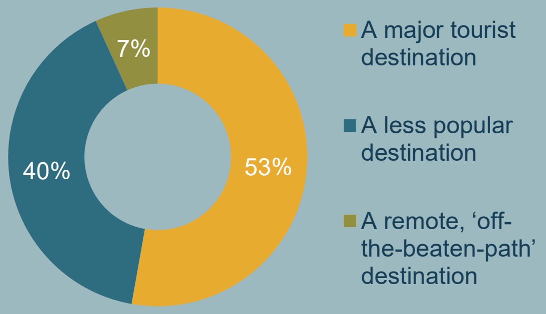
WHERE TO?



TRAVELLING WITH?



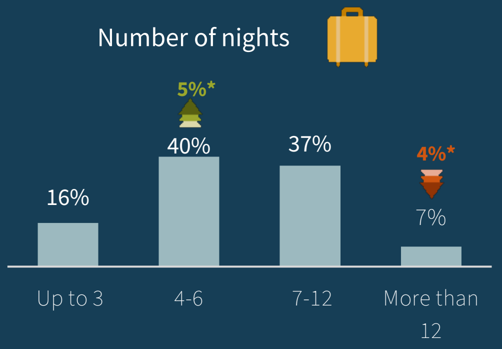
TYPE OF DESTINATION

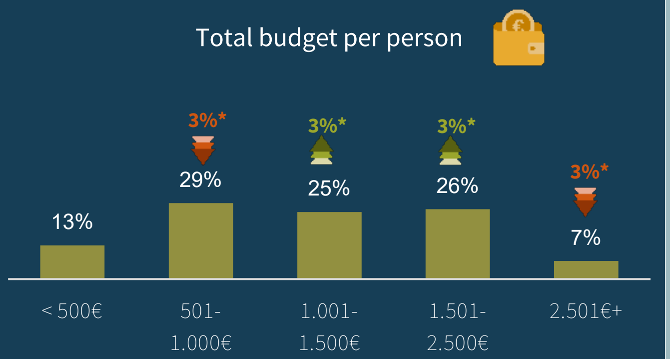


TOP SPENDING PRIORITIES

	30%	Accommodation
	26%	Food & Drinks
	15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
Spain	20%	4%*
Italy	10%	3%*
France	8%	
Greece	7%	
Portugal	7%	

** Based on total sample, without reference to domestic trips

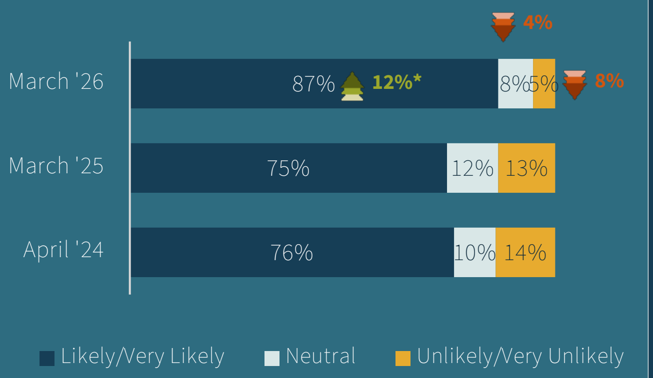
* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 750 (total sample of respondents per country)

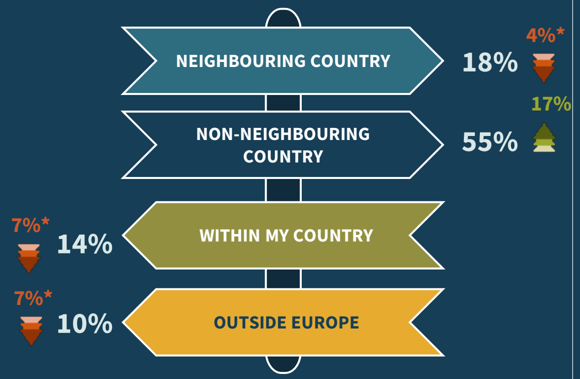
Dutch travel plans

Travel horizon: April-September 2026

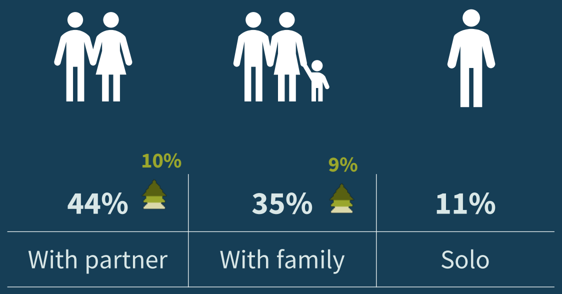
INTENTION TO TRAVEL



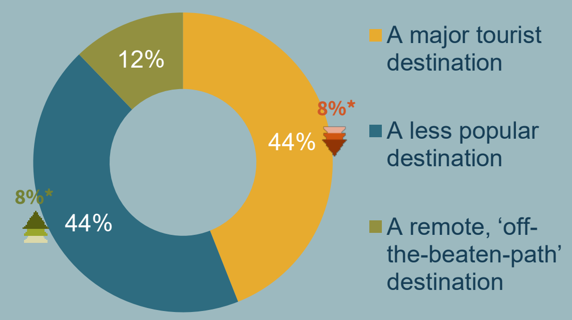
WHERE TO?



TRAVELLING WITH?



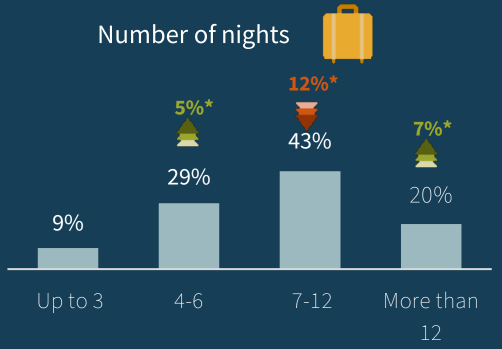
TYPE OF DESTINATION

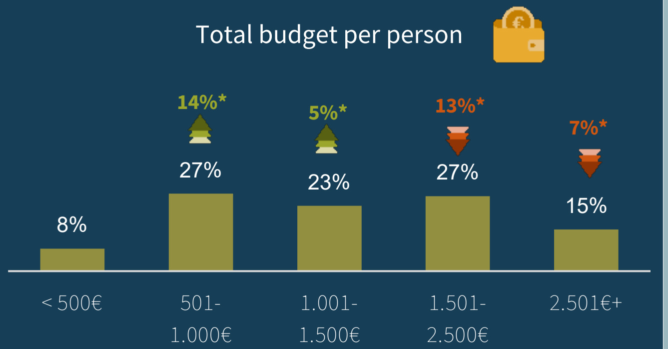


TOP SPENDING PRIORITIES

- 32% Accommodation 13%*
- 32% Food & Drinks 11%*
- 13% Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	19% 14%
Germany	10% 5%*
Italy	9% 3%*
Greece	7%
France	7%

** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 500 (total sample of respondents per country)

French travel plans

Travel horizon: April-September 2026

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
March '26	79% ▲ 14%*	7% ▼ 5%*	14% ▼ 9%*
March '25	65%	12%	23%
April '24	75%	9%	16%

WHERE TO?

NEIGHBOURING COUNTRY	37% ▲ 4%*
NON-NEIGHBOURING COUNTRY	16% ▼ 4%*
WITHIN MY COUNTRY	33%
OUTSIDE EUROPE	12%

TRAVELLING WITH?

With family	With partner	Solo
39% ▲ 9%*	37% ▲ 3%*	13%

TYPE OF DESTINATION

A major tourist destination	49%
A less popular destination	44% ▲ 4%*
A remote, 'off-the-beaten-path' destination	7% ▼ 5%*

TOP SPENDING PRIORITIES

30%	Accommodation ▲ 3%*
19%	Activities at the destination
19%	Food & Drinks

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
13%	35%	40%	12%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
15%	29% ▲ 5%*	21%	24%	11% ▼ 8%*

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	16% ▲ 10%
Italy	14% ▲ 6%*
Portugal	9%
UK	7%
Greece	7%

** Based on total sample, without reference to domestic trips

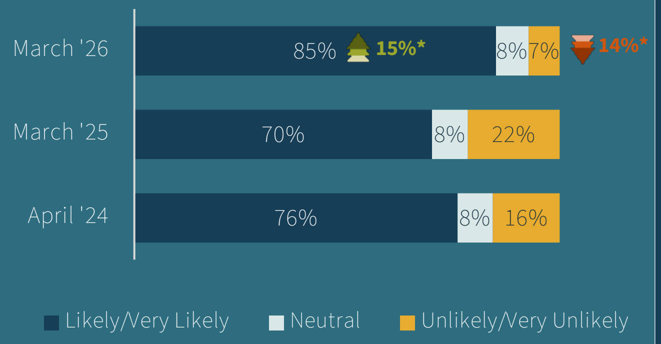
* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 750 (total sample of respondents per country)

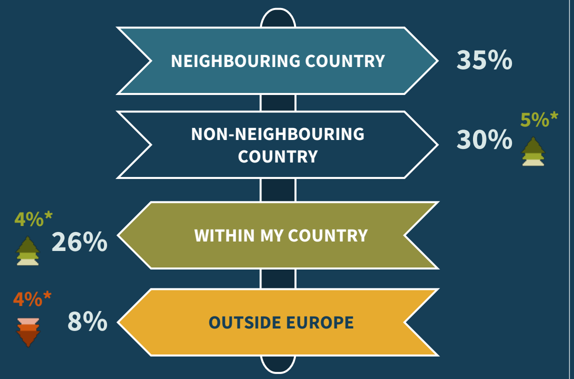
Germans’ travel plans

Travel horizon: April-September 2026

INTENTION TO TRAVEL



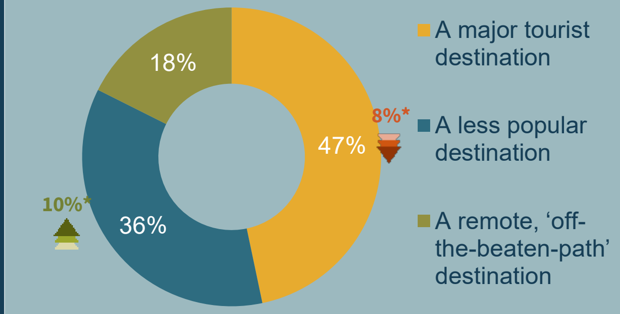
WHERE TO?



TRAVELLING WITH?

37% (10%*)	37% (6%*)	16%
With partner	With family	Solo

TYPE OF DESTINATION

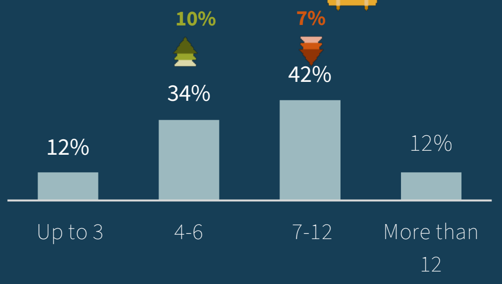


TOP SPENDING PRIORITIES

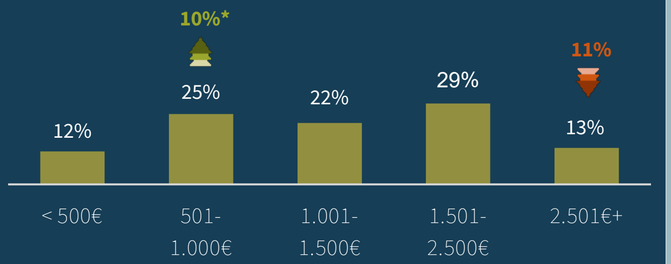
33%	Accommodation	10%*
21%	Food & Drinks	
18%	Activities at the destination	3%*

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
Spain	14%	8%*
Italy	10%	5%*
Austria	8%	
Greece	7%	
France	7%	

** Based on total sample, without reference to domestic trips

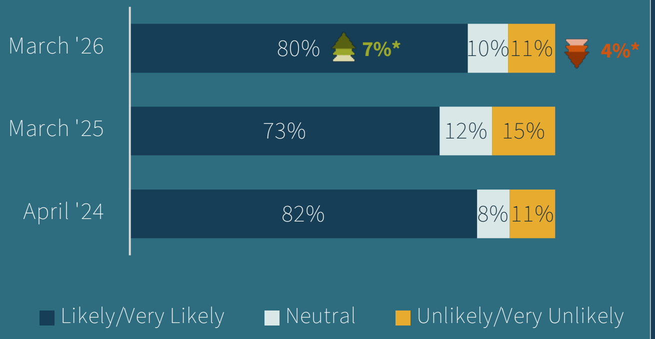
* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 750 (total sample of respondents per country)

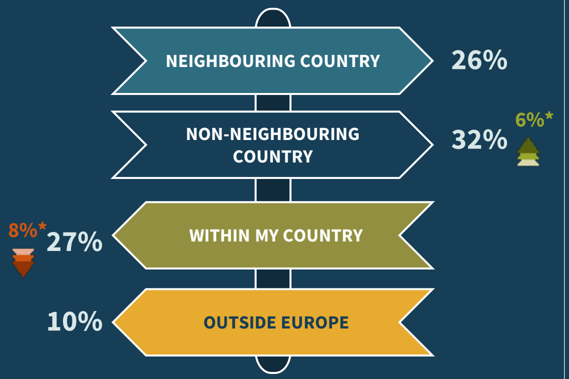
Italians’ travel plans

Travel horizon: April-September 2026

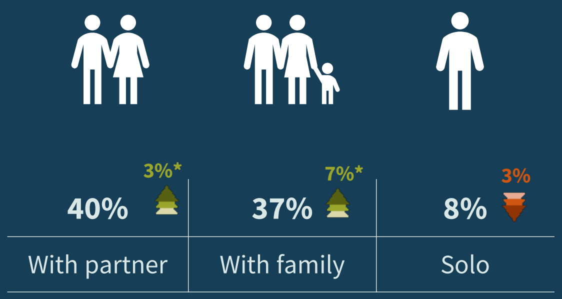
INTENTION TO TRAVEL



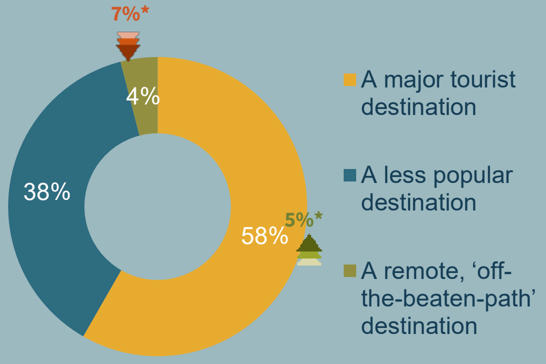
WHERE TO?



TRAVELLING WITH?



TYPE OF DESTINATION

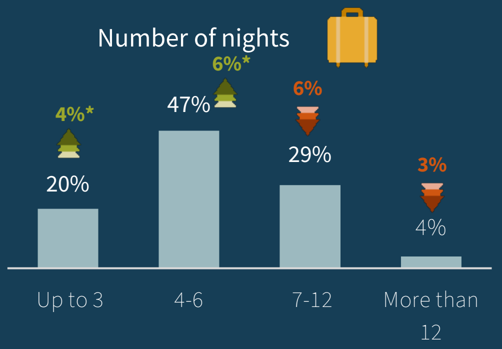


TOP SPENDING PRIORITIES

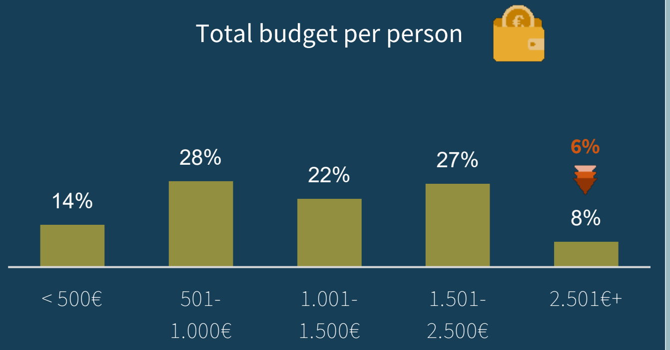
28%	Accommodation
23%	Food & Drinks
20%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	20% 12%*
France	9%
UK	7%
Portugal	6%
Greece	5%

** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 750 (total sample of respondents per country)

Poles' travel plans

Travel horizon: April-September 2026

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
March '26	88% 8%*	5%	7% 5%*
March '25	80%	8%	12%
April '24	79%	8%	13%

Likely/Very Likely · Neutral · Unlikely/Very Unlikely

WHERE TO?

NEIGHBOURING COUNTRY	24%
NON-NEIGHBOURING COUNTRY	37% 5%*
WITHIN MY COUNTRY	26%
OUTSIDE EUROPE	9% 3%*

TRAVELLING WITH?

With family	With partner	Solo
46% 4%*	31% 3%*	9% 3%

TYPE OF DESTINATION

A major tourist destination	42%
A less popular destination	49% 9%*
A remote, 'off-the-beaten-path' destination	9% 7%*

TOP SPENDING PRIORITIES

32%	Accommodation 5%*
22%	Food & Drinks
20%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
10%	43% 10%*	41% 6%*	6%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
14%	20%	20% 3%*	36% 5%*	10%

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	15% 8%*
Italy	12% 7%*
Croatia	9%
Greece	7%
Germany	5%

** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 500 (total sample of respondents per country)

Spaniards' travel plans

Travel horizon: April-September 2026

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
March '26	85% ▲ 10%*	6% ▼ 5%*	8% ▼ 5%*
March '25	75%	11%	13%
April '24	80%	9%	11%

WHERE TO?

NEIGHBOURING COUNTRY	39%	▲ 6%*
NON-NEIGHBOURING COUNTRY	20%	
WITHIN MY COUNTRY	34%	▲ 3%*
OUTSIDE EUROPE	5%	▼ 5%*

TRAVELLING WITH?

With partner	With family	Solo
41% ▲ 5%*	37% ▲ 3%*	9%

TYPE OF DESTINATION

A major tourist destination	52%
A less popular destination	41%
A remote, 'off-the-beaten-path' destination	6%

TOP SPENDING PRIORITIES

29%	Accommodation	
27%	Food & Drinks	▲ 3%*
16%	Activities at the destination	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
15%	57% ▲ 8%*	23% ▼ 8%*	4%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
14% ▲ 4%*	29% ▲ 3%*	22% ▲ 5%*	25% ▼ 5%	10% ▼ 7%

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
Italy	16%	▲ 8%*
Portugal	10%	▲ 3%*
France	10%	
UK	8%	
Germany	7%	

** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 500 (total sample of respondents per country)

Swiss travel plans

Travel horizon: April-September 2026

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
March '26	80% ▲ 11%*	11%	9% ▼ 9%*
March '25	69%	13%	18%
April '24	60%	16%	24%

WHERE TO?

NEIGHBOURING COUNTRY	39%	▲ 4%*
NON-NEIGHBOURING COUNTRY	33%	▲ 5%*
WITHIN MY COUNTRY	14%	▼ 6%*
OUTSIDE EUROPE	11%	

TRAVELLING WITH?

With family	With partner	Solo
39% ▲ 13%*	29%	18%

TYPE OF DESTINATION

A major tourist destination	36%	▼ 14%*
A less popular destination	52%	
A remote, 'off-the-beaten-path' destination	12%	▼ 8%*

21%* ▲

TOP SPENDING PRIORITIES

29%	Accommodation	
21%	Food & Drinks	▲ 6%*
14%	Activities at the destination	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
19% ▲ 7%*	35% ▲ 3%*	34% ▼ 8%*	12%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
13% ▲ 5%*	25% ▲ 13%*	25% ▲ 8%*	22% ▼ 12%*	14% ▼ 13%*

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
Italy	16%	▲ 8%*
France	12%	▲ 7%*
Spain	12%	▲ 7%*
Germany	8%	▲ 3%*
Greece	6%	

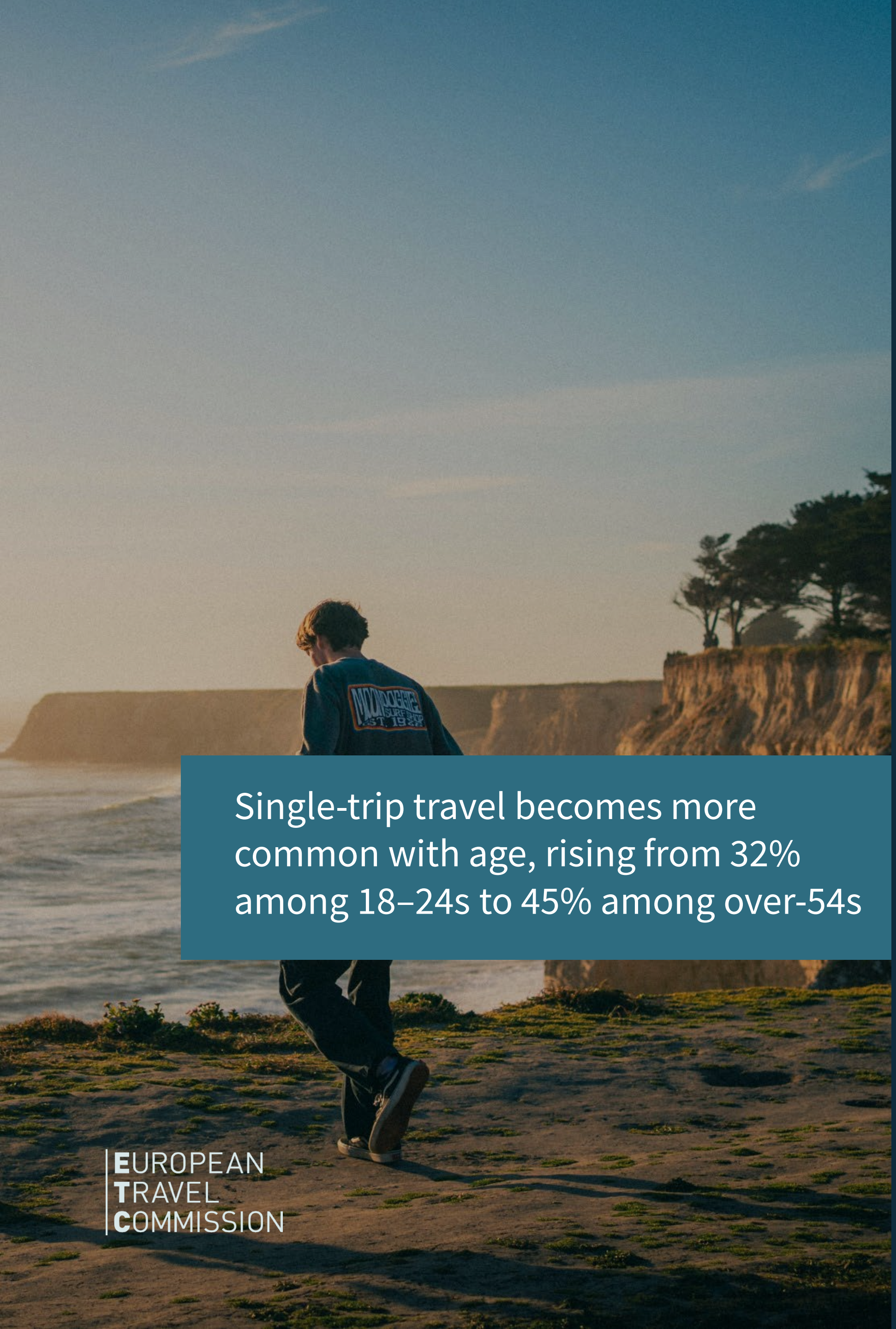
** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 491 (total sample of respondents per country)

Planning the details

02



Single-trip travel becomes more common with age, rising from 32% among 18–24s to 45% among over-54s

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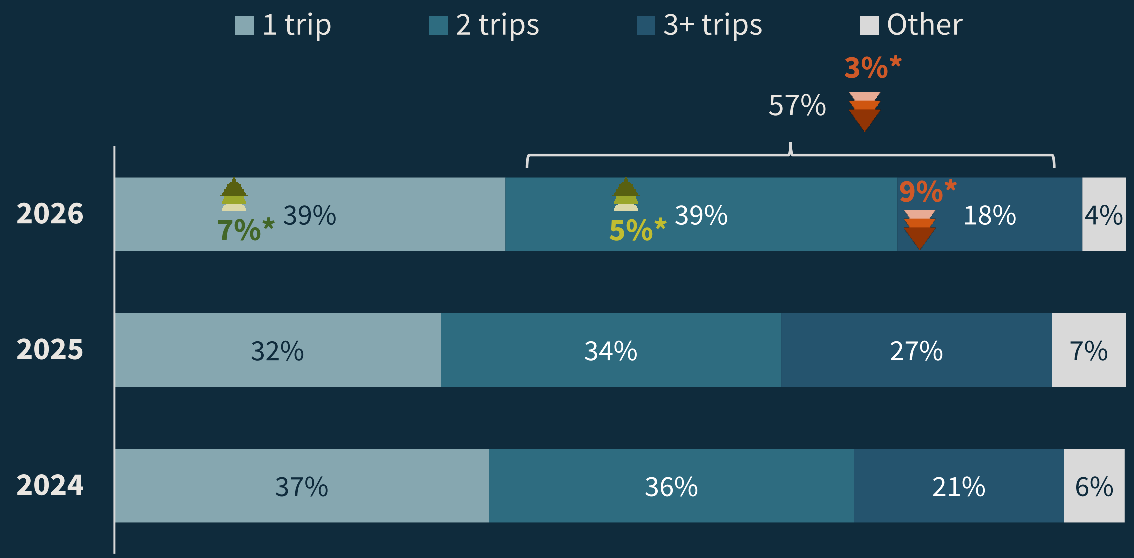
Cost concerns drive one-trip plans (+7%) and put the brakes on heading to three or more trips (-9%)

Number of intended trips within Europe in the next six months

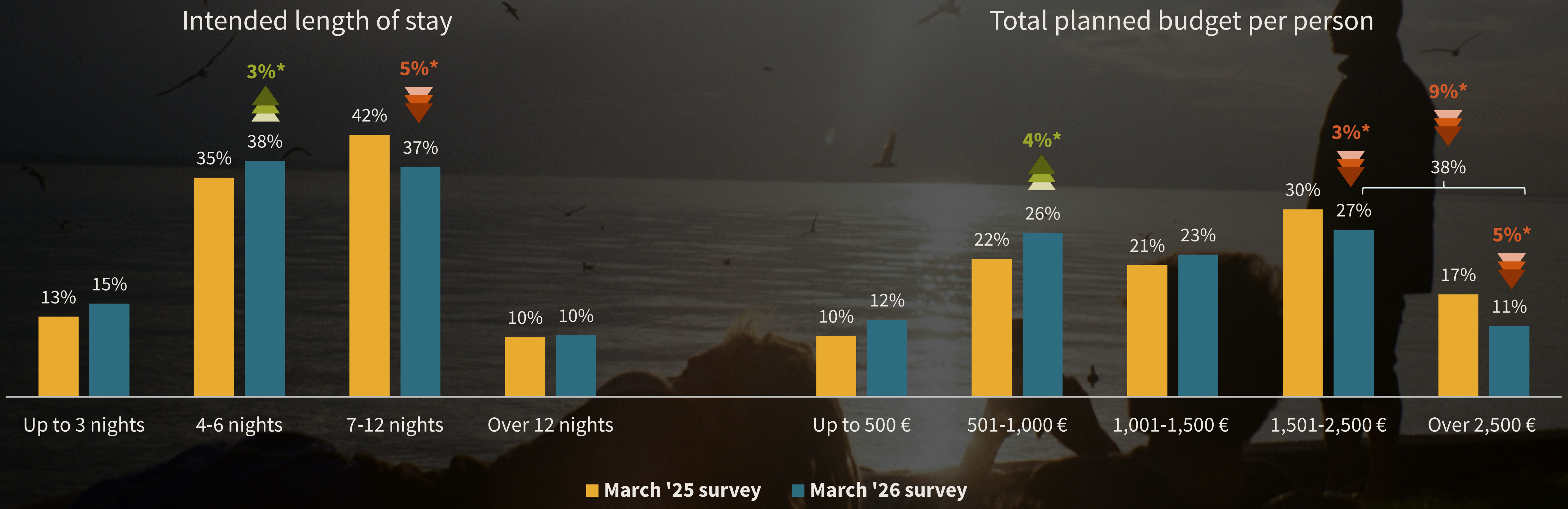


Q4. How many trips do you plan to take in the next 6 months, within Europe?

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 4,900

While travel intent holds strong, Europeans respond to cost pressures with shorter stays and lower spending

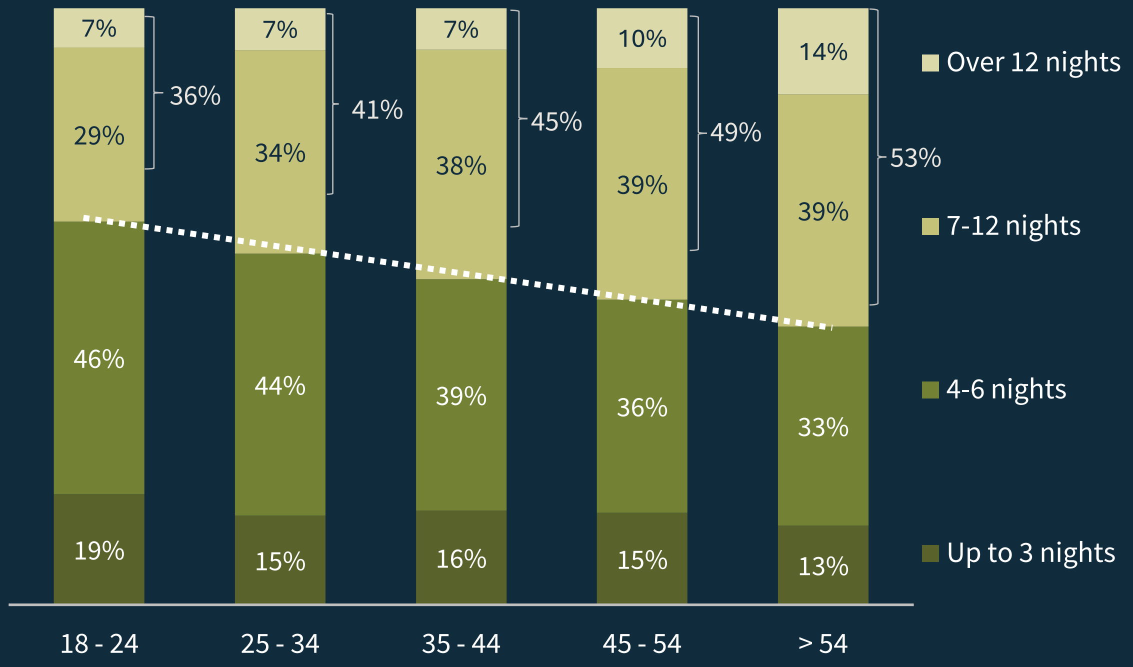


Q15. What would be the length of your next overnight trip?
Q16. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

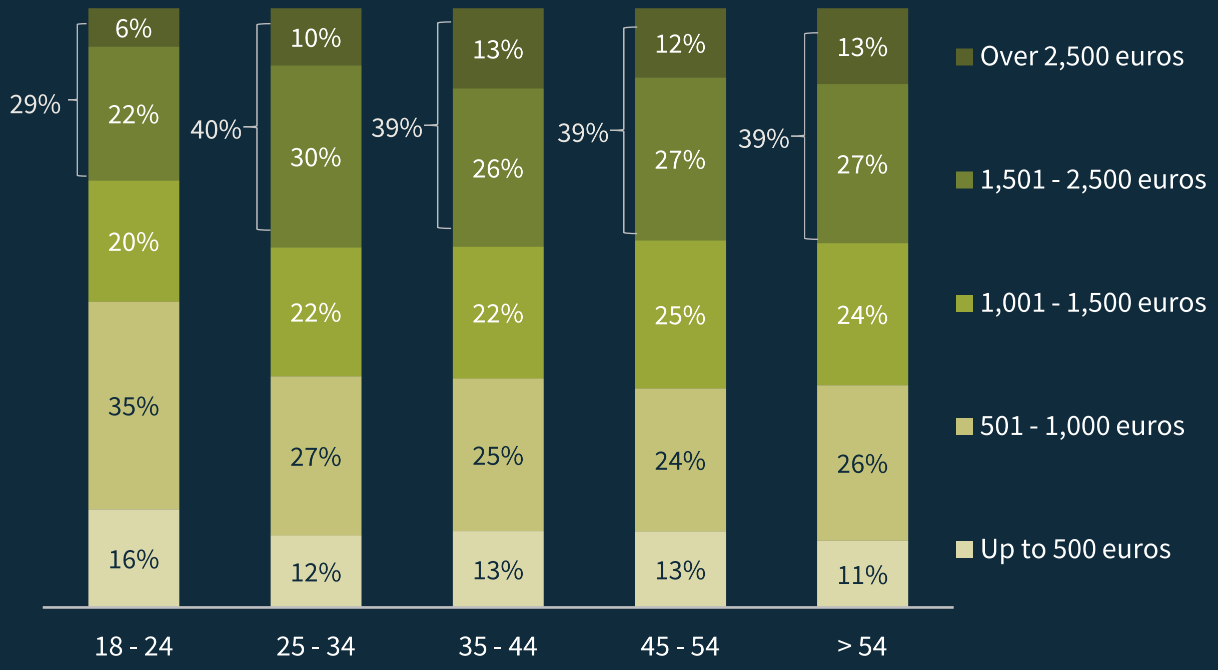
* Statistically significant difference vs a year ago (March 2025)
No. of respondents: 4,900

Older Europeans plan to invest more in their summer trips — both in length of stay and budget

Intended length of stay by age group (nights)



Projected budget by age group (euros)



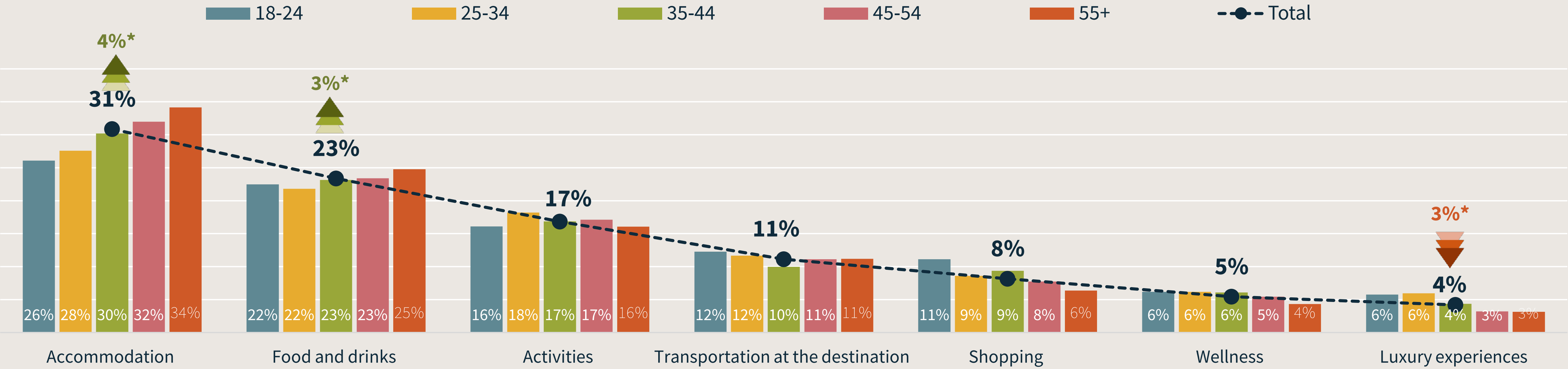
The budget is per person per trip, including accommodation, transportation and travel activities

Q15. What would be the length of your next overnight trip?
Q16. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,900

On which category will travellers spend the most?

Spending on accommodation and food rises slightly, possibly due to inflation, while luxury spending declines



Spending on accommodation and food rises with age, while younger travellers allocate more of their budget to general shopping and luxury experiences

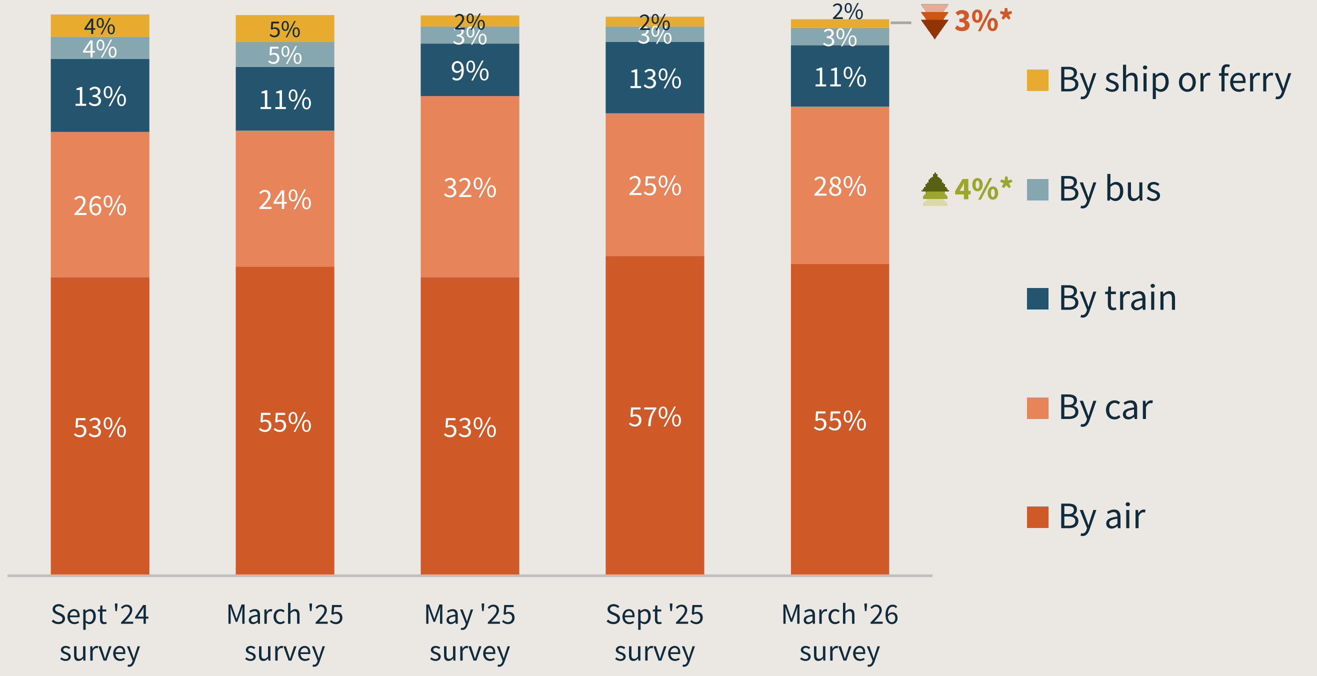
Q18. For your next trip to Europe, which of the following categories do you expect to spend the most on?

Statistically significant difference vs a year ago (March 2025)

No. of respondents: 4,900

Despite expected oil price hikes, car travel is up and air travel remains steady

Preferred modes of transport for intra-European travel



Q11. Which of the following modes of transport would you most consider using during your next trip within Europe?

Statistically significant difference vs a year ago (March 2025)

Top three reasons for flying	Top three reasons for driving
Speed 30%	**Comfort** 23%
Value for money 23%	**Value for money** 22%
Easy to plan & book 14%	**Easy to plan & book** 19%

No. of respondents: 4,900

How do Europeans' trip characteristics vary by destination region?

An analysis of preferred holiday types, typical lengths of stay, and average budgets is provided for each region

	Southern / Mediterranean Europe	Western Europe	Northern Europe	Central Europe	Eastern Europe
TOP-3 TYPES OF PREFERRED TRIPS	**37%** Sun & Beach **14%** Culture & Heritage **13%** City Break	**20%** City Break **17%** Culture & Heritage **17%** Nature & Outdoors	**22%** Culture & Heritage **18%** City Break **15%** Nature & Outdoors	**25%** City Break **21%** Culture & Heritage **14%** Sun & Beach	**20%** Culture & Heritage **17%** Sun & Beach **16%** City Break
MOST COMMON LENGTH OF STAY	**37%** 4-6 nights **30%** 7-9 nights	**44%** 4-6 nights **24%** 7-9 nights	**43%** 4-6 nights **28%** 7-9 nights	**44%** 4-6 nights **21%** up to 3 nights	**42%** 4-6 nights **23%** 7-9nights
MOST COMMON BUDGET (per person)	**26%** 1001-1500 € **18%** 1501-2000 €	**25%** 1001-1500 € **23%** 1501-2000 €	**21%** 501-1000 € **21%** 1001-1500 €	**30%** 500-1000 € **19%** 1001-1500 €	**24%** 501-1000 € **21%** 1501-2000 €

Definitions of the regions can be seen in the Methodology

NOTE: Results on Eastern Europe should be treated with caution, due to small sample base (N=168)

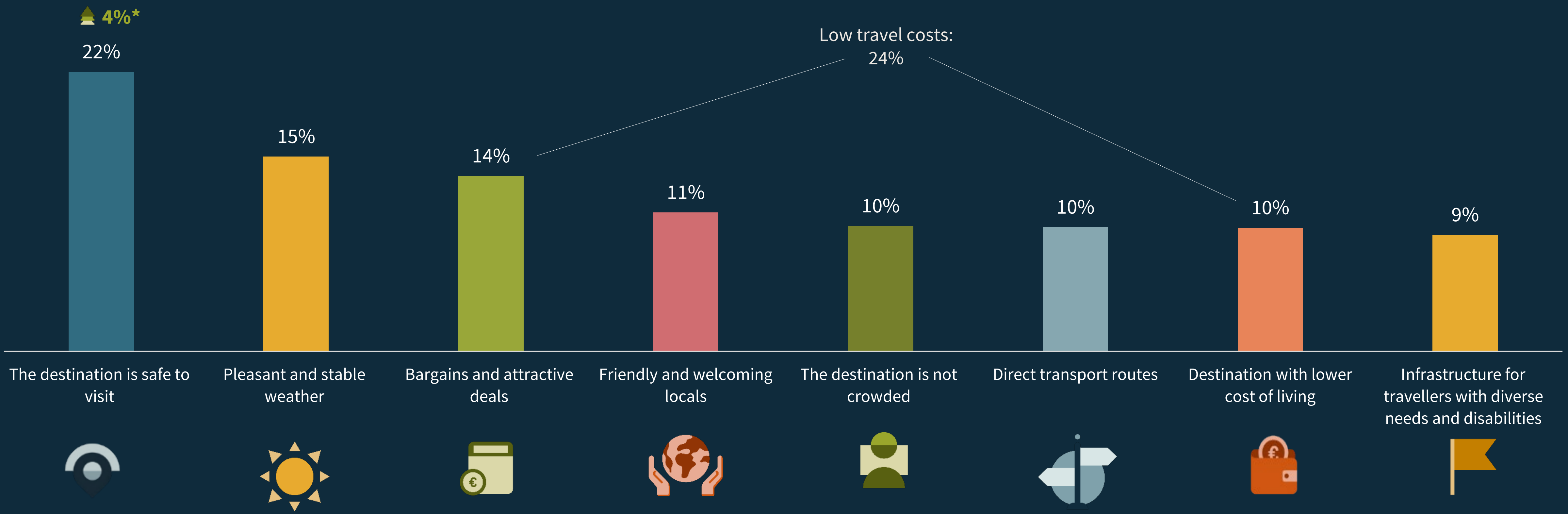
No. of respondents: 4,714

Travel considerations

03

Geopolitical unrest drives a 4% increase in safety focus, while stable weather and value for money remain key

Europeans’ top criteria in choosing a travel destination



Q2. What criteria will play the most important role in choosing your next holiday destination?

NOTE: The survey was conducted during the recent escalation of the conflict in Iran

* Statistically significant difference vs a year ago (March 2025)

No. of respondents: 5,991

What do European travellers worry about?

Rising trip costs (+3%) and Middle East tensions (+9%) are Europeans' leading travel concerns

20% 3%*
Rise in the overall cost of my trip due to inflation

18% 9%*
Potential impact on travel safety due to tensions in the Middle East

16%
Economic situation and personal finances

12%
The ongoing conflict between Russia and Ukraine

9%
Disruptions in transport options due to strikes or under-staffing

9%
Too many visitors at the destinations I want to visit

7%
Extreme weather events

5%
Booking and cancellation policies (refunds, etc.)

4%
The environmental footprint of my travel

Young travellers (18–24) are more concerned about personal finances than those over 54 (41% vs. 30%) and less concerned about potential effects of the Middle East tensions (33% vs. 45%)

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* Statistically significant difference vs a year ago (March 2025)

NOTE: The survey was conducted during the recent escalation of the conflict in Iran

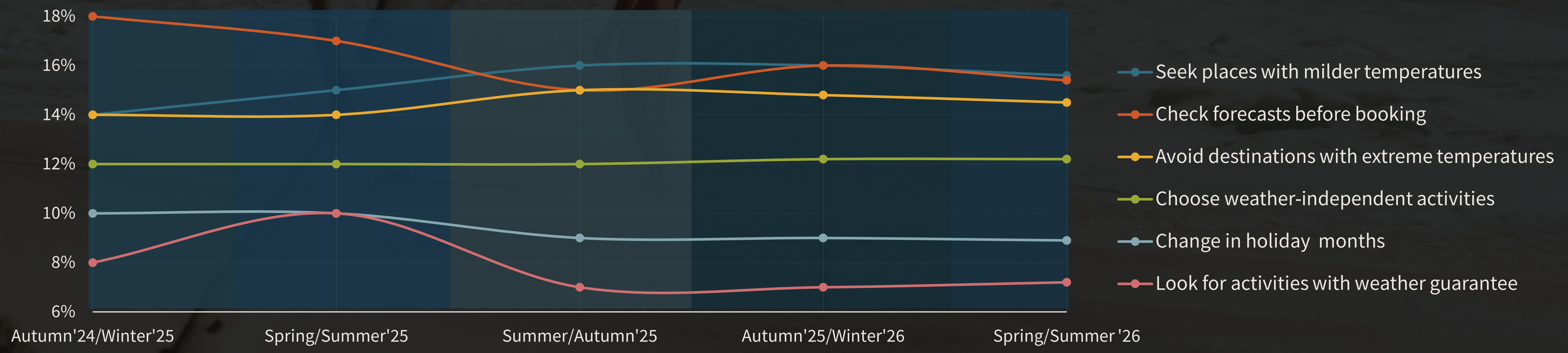
No. of respondents: 5,991

Q1. What currently concerns you the most about travelling within Europe?

75% of respondents have reported that the changing climate has impacted the way they travel

Younger Europeans (18-24 years old) are most likely to adjust their travel habits in response to the changing weather (81% vs 75% for the total sample)

Climate adaptation behaviours across travel seasons

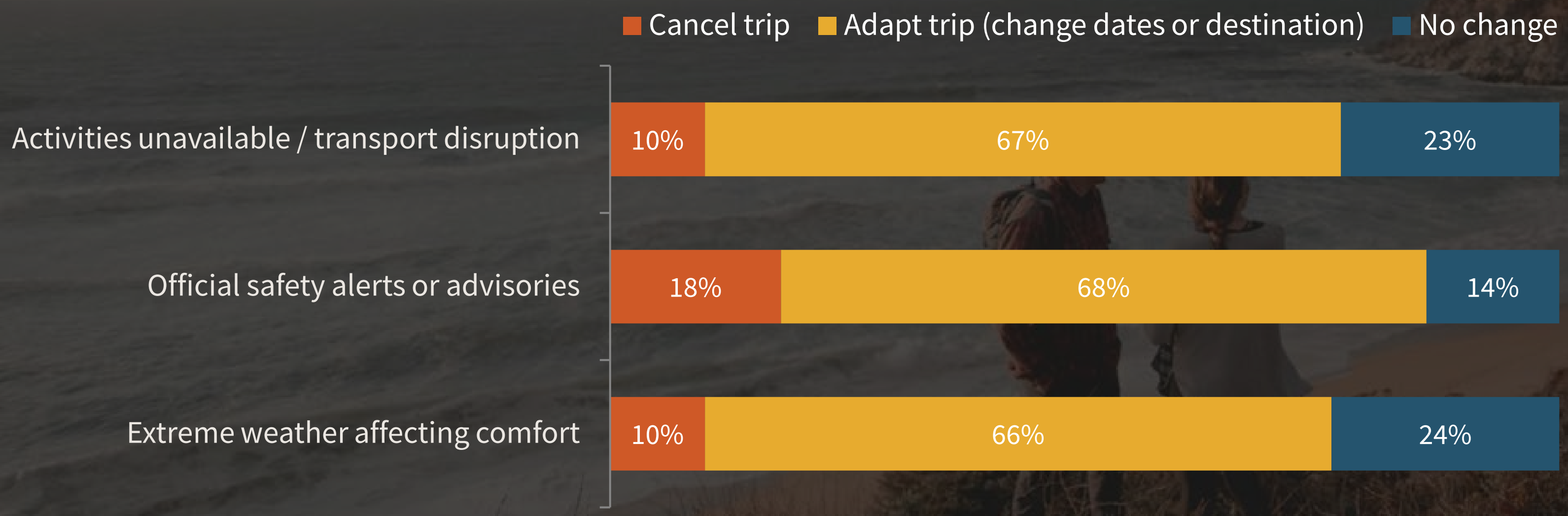


Q19. How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) have been influencing your travel habits?

No. of respondents: 5,963

When climate disrupts travel, most Europeans say they would adapt — not cancel

Intended response to climate-related disruptions



Across all three scenarios, approximately two thirds of respondents would adapt their trip rather than cancel or proceed unchanged. **Official safety alerts stand out as the strongest trigger for outright cancellation** (18% vs 10% for other scenarios).

NOTE: This is a new question, incorporated in March 2026

Q20. Thinking of your next planned trip, if any of the following climate-related conditions were to occur at your destination shortly before your departure, what would you do?

No. of respondents: 5,991

Methodology

Methodology

- The report is the result of online market research of Europeans who took at least two overnight trips during the last three years (2023-2024/25)
- Distribution/data collection period:
  - **Wave 20**: 07-23 September 2024, sample = 6,001 / **Wave 21**: 3-17 March 2025; sample = 5,974 / **Wave 22**: 27 May-10 June 2025, sample = 6,001 / **Wave 23**: 06-26 September 2025, sample = 5,963 / **Wave 24**: 04-20 March 2026, sample = 5,991
  - **Countries**: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - **Languages**: English, French, German, Italian, Spanish, Polish and Dutch
- **Research themes examined**: travel concerns and impact of external shocks on travel (nine questions), and travel intentions, preferences and trip planning (14 questions)
- 49% of the Wave 24 survey respondents are male, and 51% are female. Sample size and age groups are listed below:

Age	Country										Total
	UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
18 - 24	88	70	44	60	97	76	62	41	63	31	**632**
25 - 34	136	112	73	91	128	153	111	74	77	80	**1,035**
35 - 44	126	134	103	101	143	154	130	112	136	101	**1,240**
45 - 54	138	168	105	102	137	169	90	122	97	107	**1,235**
≥55	262	266	175	146	245	198	107	151	118	181	**1,849**
Total	**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**491**	**500**	**5,991**

- **European regions (2024 onwards)*:**
  - Southern/Mediterranean Europe: France, Croatia, Cyprus, Greece, Italy, Malta, Monaco, Montenegro, Portugal, San -Marino, Slovenia, Spain, Türkiye, Albania, Bosnia-Herzegovina, North Macedonia
  - Western Europe: Austria, Belgium, Germany, Luxembourg, Netherlands, Switzerland
  - Northern Europe: Denmark, Finland, Iceland, Ireland, Norway, Sweden, UK
  - Central Europe: Czech Republic, Hungary, Poland, Slovakia
  - Eastern Europe: Bulgaria, Estonia, Latvia, Lithuania, Romania, Serbia, Ukraine, Belarus, Moldova

* NOTE: Until summer 2023, the list of destinations did not include Albania, Bosnia-Herzegovina, North Macedonia, Belarus and Moldova

Study on Monitoring Sentiment for Intra-European Travel

Data sources: This report is based on research conducted by MINDHAUS (www.mindhaus.gr) and should be interpreted by users according to their needs.

MINDHAUS
Tourism Marketing Strategy

Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to eliminate every margin of error.

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