

European tourism shows resilience in early 2026, as regional demand stays strong amid global uncertainty

- International tourist arrivals to Europe increased by 5.6% in early 2026, with overnight stays up 5.5%, based on data from most destinations reporting up to February.
- Northern and winter destinations lead growth, with strong performance in Ireland, Finland, Italy and Austria.
- Disruptions linked to the Middle East conflict are reshaping global travel flows. At this stage, the impact on Europe remains relatively insulated due to its safety reputation and strong intra-regional demand.

Brussels, 7 May 2026: Europe's tourism sector recorded a strong start to 2026, with international tourist arrivals rising by 5.6% and overnight stays by 5.5% compared to the same period in 2025. According to the latest *European Tourism: Trends & Prospects* report by the European Travel Commission (ETC), travel demand remained robust during the off-season, with a stable performance across most European destinations. This estimate is based on year-to-date data, with most destinations reporting results only up to January and February 2026.

This comes amid the conflict in the Middle East, which is disrupting global travel flows. The conflict is affecting air corridors, increasing costs and creating uncertainty for long-haul travel. At this stage, Europe is expected to face a limited direct impact, supported by its safety reputation and strong intra-regional demand base. However, ongoing uncertainty and the risk of jet fuel shortages may pose additional downside risks to this outlook.

Northern and winter destinations drive early-year growth

Tourism performance in early 2026 was led by Northern Europe and winter destinations. Northern Europe reported strong demand in January and February, with arrivals up 13%. Ireland (+30%) and Finland (+12%) were among the top performers, supported in part by increased business travel.

Ski destinations also recorded solid growth. Italy (+14%) stood out, benefiting from strong demand and additional momentum linked to the Winter Olympics. Austria (+7%) and France (+5%) saw increased bookings driven by favourable ski conditions and aligned holiday periods in key source markets. Elsewhere, Germany showed signs of recovery following a weaker 2025, with arrivals up 2.7% in early 2026.

Winter sun and value-for-money destinations in demand

Southern and Mediterranean destinations continued to attract the largest share of travellers in early 2026, though growth was more moderate in percentage terms compared to Northern Europe. Demand was supported by travellers seeking milder winter temperatures and by ongoing efforts to promote year-round tourism across the region.

Greece recorded strong growth in arrivals (+33%), although a more modest increase in overnight stays suggests shorter trips. Other destinations also benefited from winter sun demand in early 2026, including Cyprus (+9%), Croatia (+8%) and Spain (+2%).

Impact of the Middle East conflict on European travel

The conflict in the Middle East is expected to affect European tourism primarily through higher travel costs, reduced connectivity via key transit hubs, and weaker long-haul demand. At the same time, IATA has warned that potential jet fuel shortages could lead to flight cancellations in Europe by the end of May.

The latest Tourism Economics estimate available to date suggests that disruptions limited to a two-month conflict could place around 4% of Europe's international overnight stays at risk in 2026, equivalent to approximately 103 million nights. With the conflict now exceeding this timeframe, the impact could be more pronounced, although uncertainty remains regarding its overall magnitude.

Strong intra-European demand supports resilience

Despite an uncertain outlook, Europe's tourism sector remains supported by a strong base of intra-regional travel. Around 80% of inbound travel to European destinations originates within the region, helping limit exposure to external shocks.

In periods of geopolitical uncertainty, travellers tend to favour destinations that are perceived as safer and closer to home. This behavioural shift is expected to support demand within Europe in 2026, as some travellers postpone or redirect trips that would otherwise have been taken to more affected regions.

Past periods of instability in the Middle East have resulted in gains for European destinations, particularly in the Mediterranean. However, growth is likely to vary across destinations, with those more dependent on long-haul or Middle East markets seeing relatively weaker performance.

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

“Europe’s tourism sector has shown a strong start to early 2026, underlining the resilience of travel demand amid a more complex global environment.

While the conflict in the Middle East is putting pressure on costs and connectivity, Europe remains supported by intra-regional demand and its strong reputation as a safe destination. Maintaining competitiveness will require a continued focus on ensuring stable connectivity and value for money in the months ahead.”

The full report can be downloaded from: <https://etc-corporate.org/reports/european-tourism-trends-prospects-q1-2026/>

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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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