
Press Release

European tourism holds firm despite rising uncertainty and changing traveller priorities

- International tourist arrivals to Europe increased by 5.0% year-to-date, with overnight stays up 4.8%.
- Almost 80% of reporting destinations recorded growth in Q2, despite aviation disruptions.
- Travellers are prioritising value, safety, nearby destinations and showing increased interest in shoulder-season trips.

Brussels, 9 July 2026: European tourism continued to perform strongly in Q2 2026, despite rising geopolitical and economic uncertainty, according to the latest *European Tourism: Trends & Prospects* quarterly report from the European Travel Commission (ETC).

International tourist arrivals to Europe increased by 5.0% year-to-date compared to the same period in 2025, while overnight stays rose by 4.8%. The stable performance comes despite weaker consumer confidence, rising affordability pressures and disruption linked to the conflict in the Middle East, which affected aviation flows between Europe and certain mid-haul and long-haul markets.

The findings show that travel remains a priority for consumers, but choices are becoming more selective. Travellers are increasingly looking for destinations that are perceived as safer, offer good value for money and are easier to reach, while trips continue to spread more evenly across the year.

Tourism growth remains broad-based across Europe

Destination performance remained largely stable, with almost 80% of reporting destinations recording growth and around one in five achieving double-digit increases in arrivals. The largest increases in arrivals during the first months of 2026 were recorded by Greece (+38%), Italy (+21%) and Malta (+16%), supported by strong connectivity and efforts to spread demand beyond peak seasons and traditional hotspots.

Northern Europe outperformed all other European subregions, with arrivals up 10.0% and overnight stays up 8.4%. Central and Eastern Europe also recorded growth, with arrivals increasing by 5.2% and nights rising by 6.9%, reflecting continued interest in destinations offering new experiences and better value for money. Southern and Mediterranean Europe remained solid overall, recording the largest growth in absolute terms, with broad-based increases in Malta, Greece, Italy, Portugal and Spain.

Middle East disruption weighs on some destinations and air travel

While the overall outlook remains positive, some destinations faced a more challenging start to the year. Cyprus recorded a 17.9% decline in arrivals, partly due to Easter timing effects and weaker traveller sentiment linked to perceived proximity to the conflict in the Middle East. Türkiye also saw arrivals fall by 2.1%, reflecting softer demand from both European and long-haul visitors amid the regional conflict.

The impact was also visible in aviation. European air passenger activity remained strong in Q1 2026, with Revenue Passenger Kilometres up 7.0% and March recording the strongest growth at 8.0%. However, performance slowed sharply in April to 1.0%, as the conflict disrupted flights between Europe and several long-haul markets.

Spending points to higher value per visitor

Travel spending outpaced arrivals in most reporting destinations, suggesting higher spend per visitor than a year earlier. Greece stood out as one of Europe's strongest performers, with spending up 64.3% and arrivals up 38.3%, pointing to significantly higher spend per trip.

Performance varied across destinations. In Italy, arrivals rose by 21.1%, while travel spending increased by 4.3%, reflecting softer average spend per visitor despite volume growth. Türkiye and Cyprus were among the few destinations where both arrivals and travel spend fell, likely reflecting weaker traveller sentiment linked to the Middle East conflict.

Value, proximity, and shoulder-season trips shape demand

Looking ahead to summer 2026, leisure travel is expected to remain a priority despite continued economic uncertainty. In key European source markets, leisure travel spending is forecast to remain steady at 13.0% of total consumer spending in 2026, well above the global average of 8.5%. The share in key non-European source markets is also set to increase slightly, from 7.5% in 2025 to 7.7%.

Alongside this, travellers are becoming more price-sensitive. In the latest Travel Industry Monitor survey, 48% of European respondents identified affordability and value for money as a key opportunity for Europe in Q2, up from 32% in Q1. This points to a more competitive summer season, with destinations that align closely with travellers' budgets and preferences better placed to attract demand.

European travellers are also expected to favour nearby destinations that are easier to reach, more familiar and offer greater flexibility. Southern and Mediterranean Europe is well-positioned to capture this demand, with interest in the region between June and November rising to 61%. Shoulder months are also gaining importance, as travellers respond to concerns around extreme weather events and overcrowding, with September bookings rising strongly across Europe.

Sustainability is becoming a more visible part of travel planning. Google Trends data show rising interest in "sustainable tourism" in 2026 compared with the same period in 2025. However, awareness does not always translate into action, with only 41% of consumers intending to change their travel behaviour due to environmental concerns.

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

European tourism has continued to show resilience in Q2 2026, despite a more uncertain global environment. Travel remains a priority for consumers, but the way people travel is changing. Affordability, safety, proximity and value for money are becoming increasingly important in destination choice. For European destinations, the priority is to remain competitive while supporting more balanced visitor flows across regions and seasons.

The full report can be downloaded from: <https://etc-corporate.org/reports/european-tourism-trends-prospects-q2-2026/>

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.

Media contact

Aicha Sakhi
Penta Group
etc@pentagroup.co
Ph: +32 (0)490 16 06 92

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European Travel Commission

Rue du Marché aux Herbes
61, 1000 - Brussels, Belgium
Tel: +32 2548 90 00
www.etc-corporate.org

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