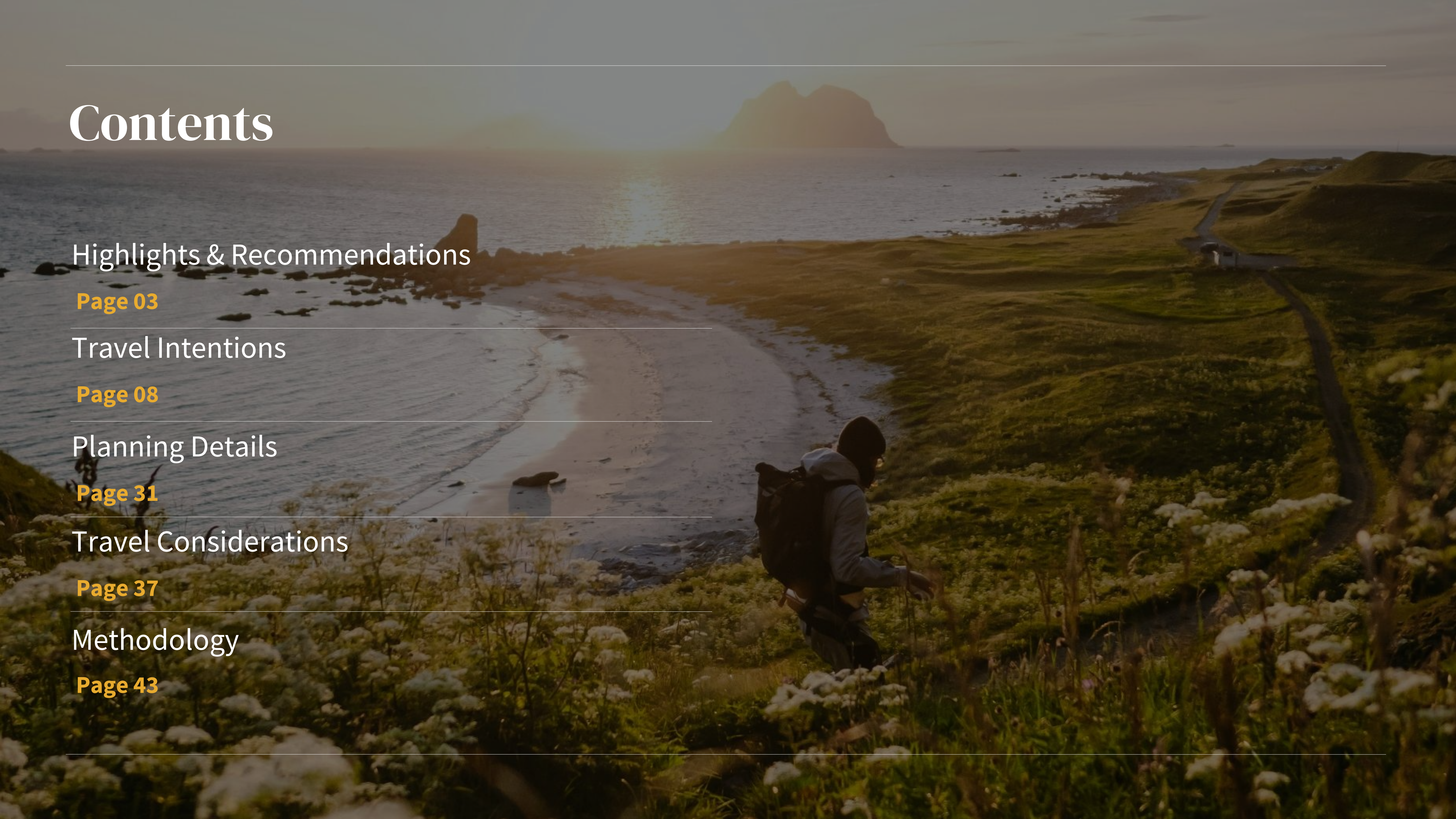
Monitoring Sentiment for Intra-European Travel

Summer & Autumn 2026

Co-funded by
the European Union

EUROPEAN
TRAVEL
COMMISSION



Contents

Research highlights

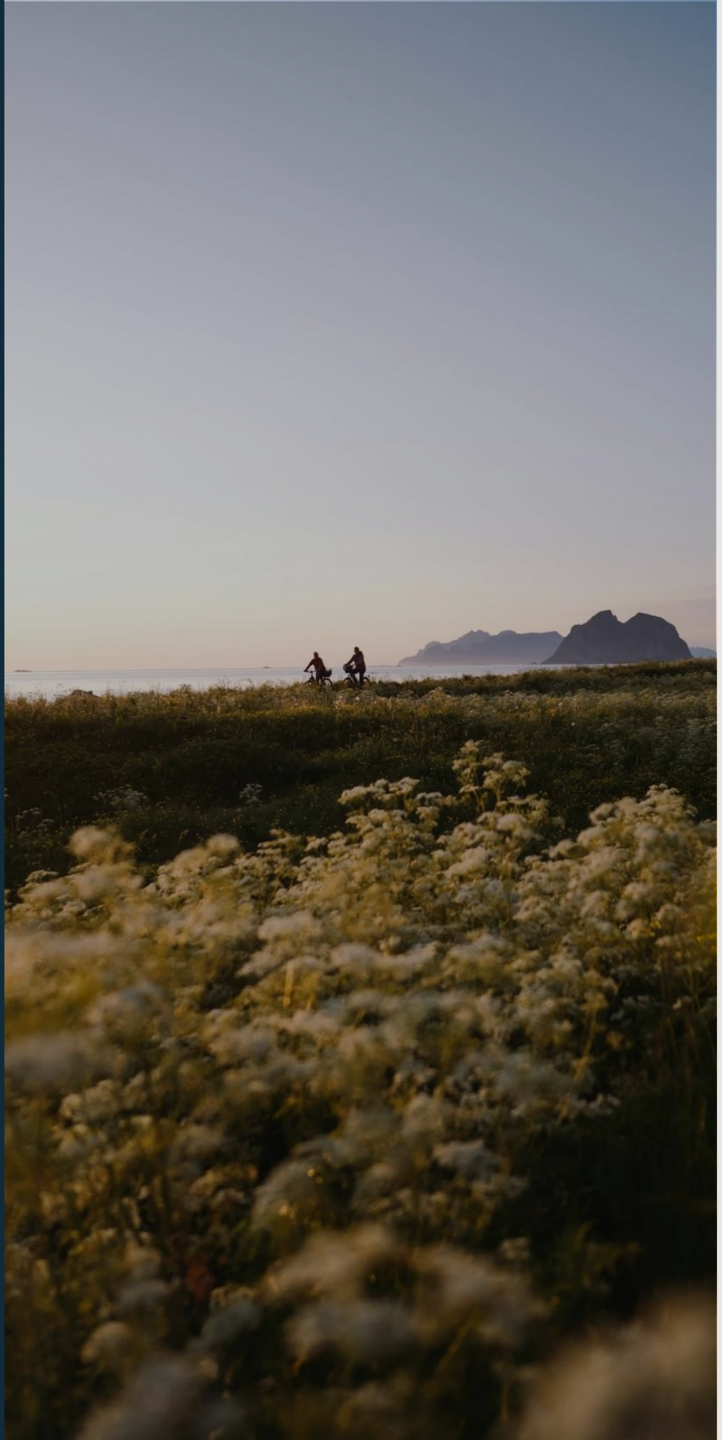
WAVE 25

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

It is the 25th update since the series began in September 2020.

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

EUROPEAN TRAVEL COMMISSION



TRAVEL INTENTIONS

- 81% Europeans plan to travel this summer and autumn, a significant 4% year-on-year rise.
- July (25%) and August (24%) are Europeans' most popular travel months; another 17% plan to travel in June (+3%).
- Intra-European travel remains dominant at 64%, alongside a stable 26% who intend to travel domestically.
- Interest in Southern and Mediterranean Europe rises to 61% (+4%), further reinforcing the region's strong appeal.
- Intent to visit major tourist destinations rises slightly to 48% (+3%), though the majority of travellers (52%) continue to favour less popular destinations.
- Single-destination trips remain the preferred format, with 52% of Europeans planning to stay in one place and 42% aiming to visit multiple destinations within the same country.
- Sun & Beach holidays remain leisure travellers' top choice (30%), followed by Nature & Outdoors (15%) and City Breaks (14%).

Comparisons vs. a year ago (May 2025)

Research highlights

WAVE 25

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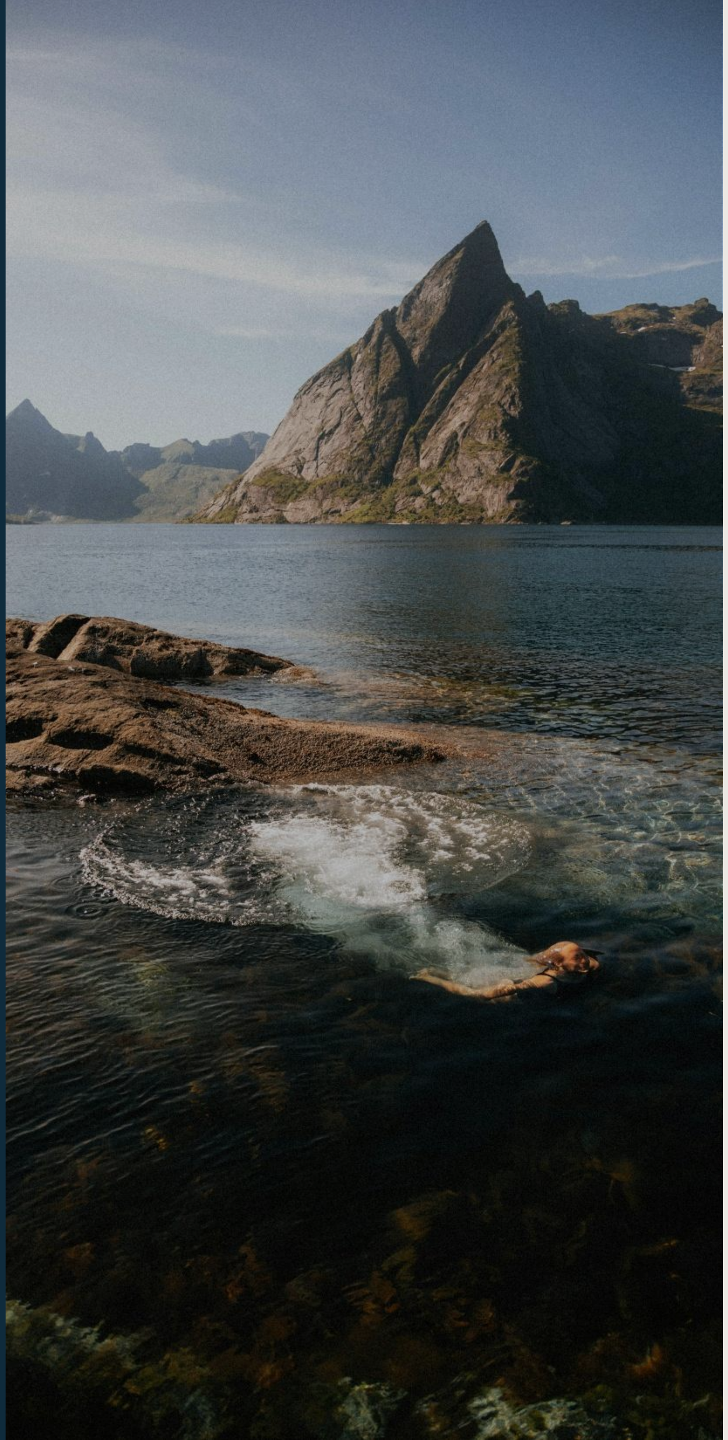


TRIP PLANNING

- Multiple-trip intentions have reached 55% for the coming summer and autumn, while 41% of Europeans plan to take a single trip.
- Summer trips are relatively long, with 40% of Europeans planning to stay 7–12 nights, while €1,500–€2,500 remains the most common trip budget, unchanged from last year.
- Air travel holds its position as travellers' leading transport choice (53%), despite soaring jet fuel costs.

TRAVEL CONCERNS AND CONSIDERATIONS

- Destination safety (20%), pleasant weather (15%) and attractive deals (14%) are the leading drivers of Europeans' destination choices.
- Rising trip costs (22%) and personal finances (17%) lead travellers' concerns, followed by worries over the Middle East conflict (14%), up by 7%.
- Travellers continue to adapt to the climate crisis by seeking milder temperatures (16%), avoiding extreme heat (15%) and checking weather forecasts before their trips (15%).

Comparisons vs. a year ago (May 2025)

Recommendations for destinations

- Rising interest in Southern and Mediterranean Europe increases the need to balance tourism pressures and improve spatial distribution. Destinations can respond **through tighter management of short-term rentals**, **digitally monitored visitor quotas or timed entry** at crowded attractions, as well as **targeted investment in less-popular areas** to spread demand more evenly.
- Low travel intentions for October and November point to the need to strengthen shoulder-season demand through curated off-peak propositions. Destinations can stimulate shoulder-season travel through **autumn cultural programming**, **food and wine events**, **music festivals**, **targeted campaigns and attractive seasonal pricing,** which are strong motivators for autumn travellers.
- Culture & Heritage travellers' higher spending on activities highlights the value of **deeper, experience-led product development**. Museums, heritage interpretation, local storytelling, architecture trails, neighbourhood curation and creative experiences can increase both the appeal and the economic value of the visit.
- The combined appeal of less popular destinations and multi-destination trips creates an opportunity to develop **integrated multi-stop itineraries** and destinations should make in-country travel easier to plan and book. Clear regional routes, themed itineraries, and stronger transport connections between primary and secondary locations can support both dispersion and a richer visitor journey.
- Travellers' search for milder temperatures creates **a strategic opportunity for destinations less exposed to extreme heat**, especially as pleasant weather continues to shape destination choice. Destinations with more comfortable weather conditions should communicate this more deliberately as part of their value proposition. Weather comfort, ease of outdoors movement, and a more pleasant pace of travel can become strong differentiators, especially during shoulder months and in regions competing with hotter summer destinations.

Recommendations for businesses

- To enhance the, relatively low, travel desire during autumn, businesses can **develop more targeted offers for the post-summer period**. Seasonal packages built around gastronomy, wellness, culture, or soft outdoor activities can help capture travellers looking for quieter conditions, better value, and more comfortable weather.
- Businesses attracting domestic travellers, who are more likely to stay in one location, can use this opportunity to offer deeper, place-based experiences. This could include **local tours, workshops, home-cooked meals, traditional bed and breakfasts and authentic encounters** that invite visitors to go beneath the surface and engage meaningfully with the destination.
- With one in ten leisure travellers planning a wellness trip this summer, businesses should **enrich their offer with products that combine rest, self-care and gentle physical activity**. This may include healthier food options, relaxation-oriented spaces, nature-based treatments, and flexible wellness add-ons that enhance the overall holiday proposition.
- Sun & Beach holidaymakers' higher spending intent creates room for premiumisation. Coastal hotels, resorts, beach clubs and activity providers can offer **upgraded experiences** such as sunset dining, private beach services, water-based activities, wellness add-ons and curated local excursions to boost spending without relying only on volume.
- Travellers' continued cost concerns, especially during autumn, make communicating value for money essential. Businesses should **communicate value more clearly rather than relying only on lower prices**. Bundled offers, added services, flexible inclusions and clearer explanation of what is covered in the price can strengthen perceived value and support conversion in a cost-conscious market.

WAVE 25

Reading the data

Data collection periods

Wave 25	16-30 May 2026
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

Analysed samples

- Total respondents: 6,076
- Respondents most likely to travel in the next six months: 4,943
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 4,703

Travel timings for Wave 25

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

In 1-2 months:	June-July 2026
In 3-4 months:	August-September 2026
In 5-6 months:	October-November 2026

Significant changes

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

Increase ▲ Decrease ▼

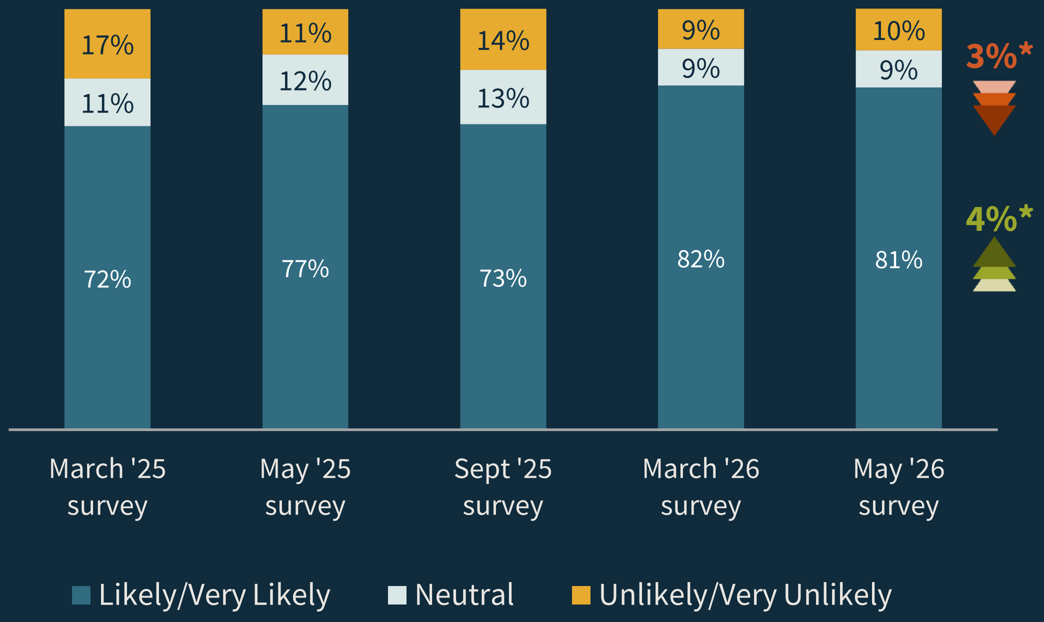
All data and insights refer to domestic and intra-European travel unless otherwise stated.

Travel intentions

01

Europeans’ travel sentiment still on an upward curve, with a 4% rise from this time last year

Intention to travel in the next six months



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

POLAND

90% 7%*

SPAIN

85%

NETHERLANDS

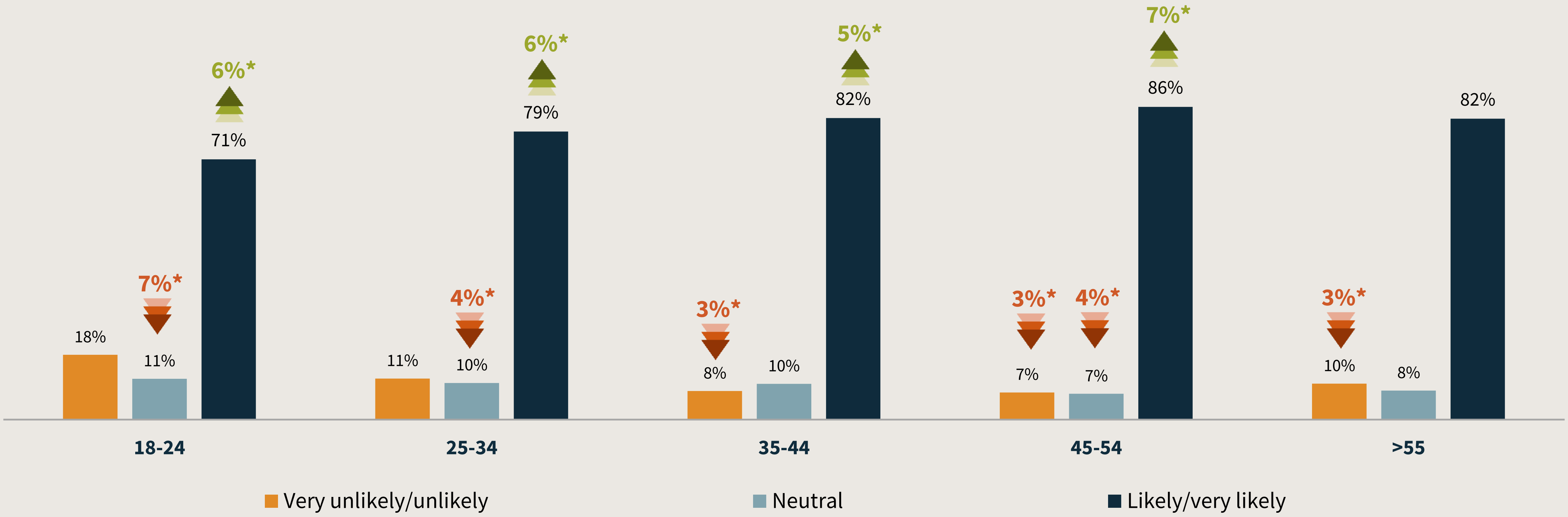
84%

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 (May 2025)
No. of respondents: 6,076

Travel sentiment rises across most age groups, peaking among Europeans aged 45–54

Intention to travel in the next six months by age group



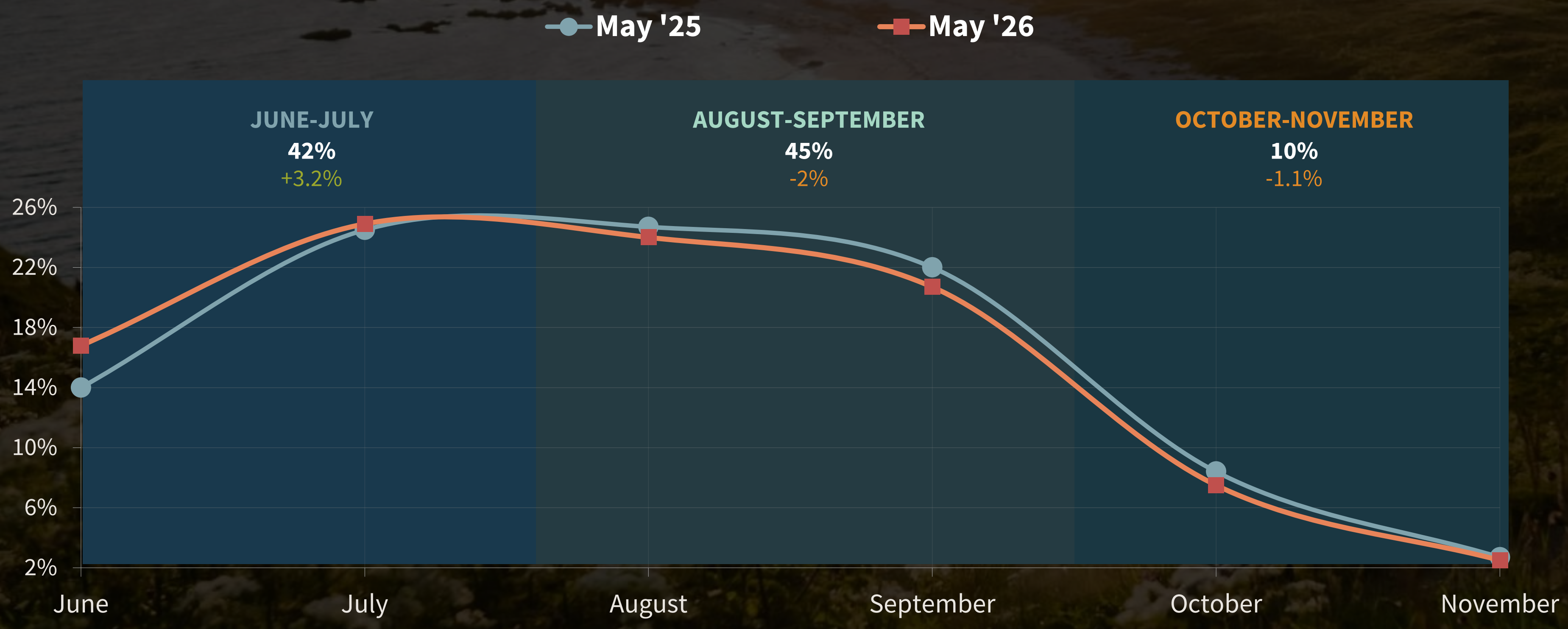
* Statistically significant difference vs a year ago (May 2025)

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: 6,076

More Europeans plan their first trip in June or July, while travel intentions remain similar for summer and autumn

When will Europeans travel next?



Oct–Nov travellers tend to be more budget-conscious, with 40% planning to spend up to €1,000, compared to 33% of summer travellers.

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 May 2026. Planning certainty naturally decreases for months further from the survey date; absolute monthly distributions should therefore be interpreted with caution

No. of respondents: 4,943

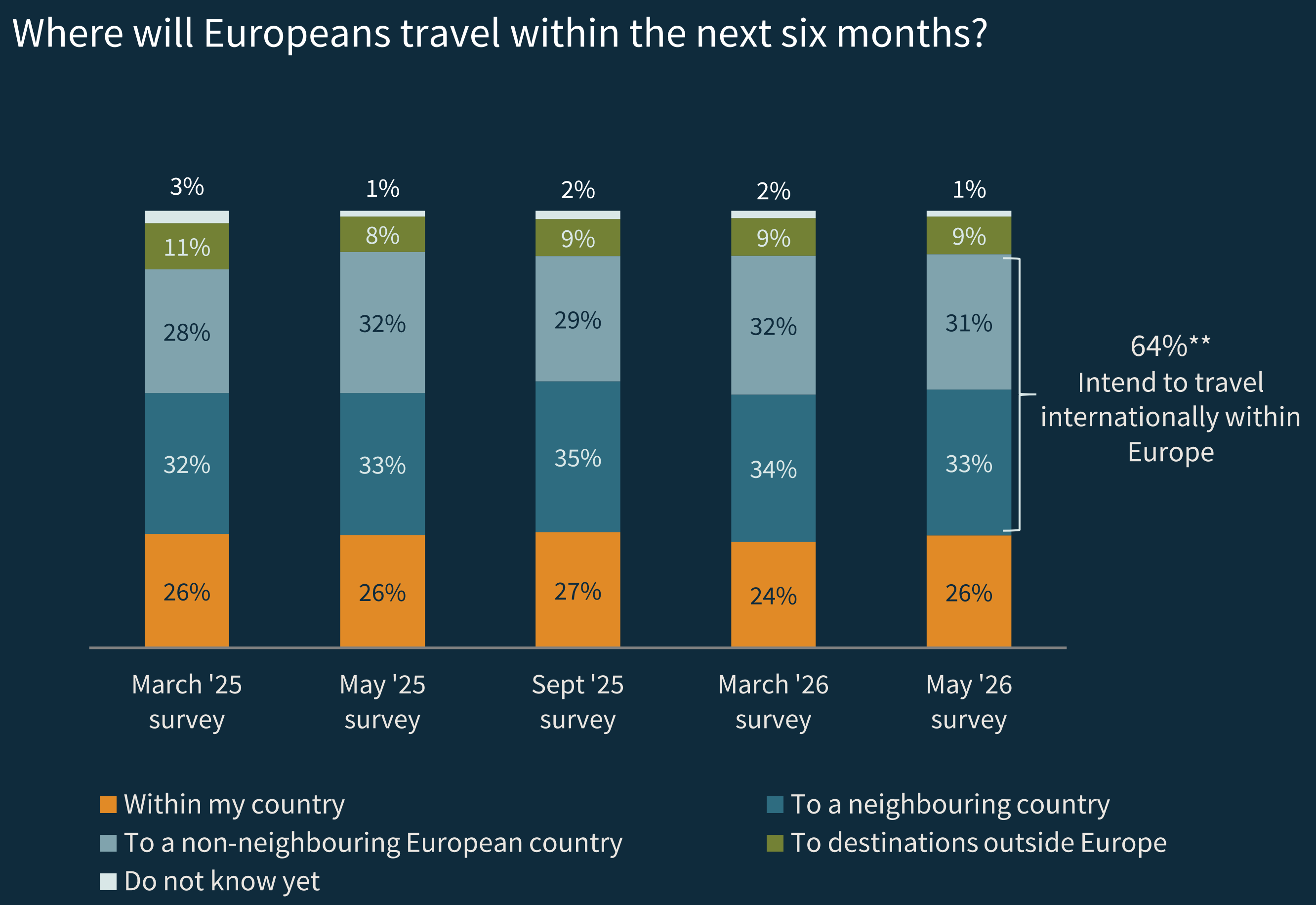
How do Europeans' trip characteristics vary by travel period?

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

	JUNE-JULY travellers	AUGUST-SEPTEMBER travellers	OCTOBER-NOVEMBER travellers
TOP-3 TYPES OF PREFERRED TRIPS	**33%** Sun & Beach **15%** City Break **14%** Nature & Outdoors	**31%** Sun & Beach **16%** Nature & Outdoors **14%** Culture & Heritage	**22%** Culture & Heritage **20%** Sun & Beach **16%** Nature & Outdoors
MOST COMMON LENGTH OF STAY	**32%** 4-6 nights **29%** 7-9 nights	**39%** 4-6 nights **29%** 7-9 nights	**38%** 4-6 nights **25%** 7-9 nights
MOST COMMON BUDGET (per person)	**23%** 501-1000 € **21%** 1001-1500 €	**24%** 1001-1500 € **24%** 501-1000 €	**29%** 501-1000 € **21%** 1501-2000 €

No. of respondents: June-July 2,060 | August-September 2,207 | October-November 495

64% of Europeans plan an intra-European trip this coming summer and autumn

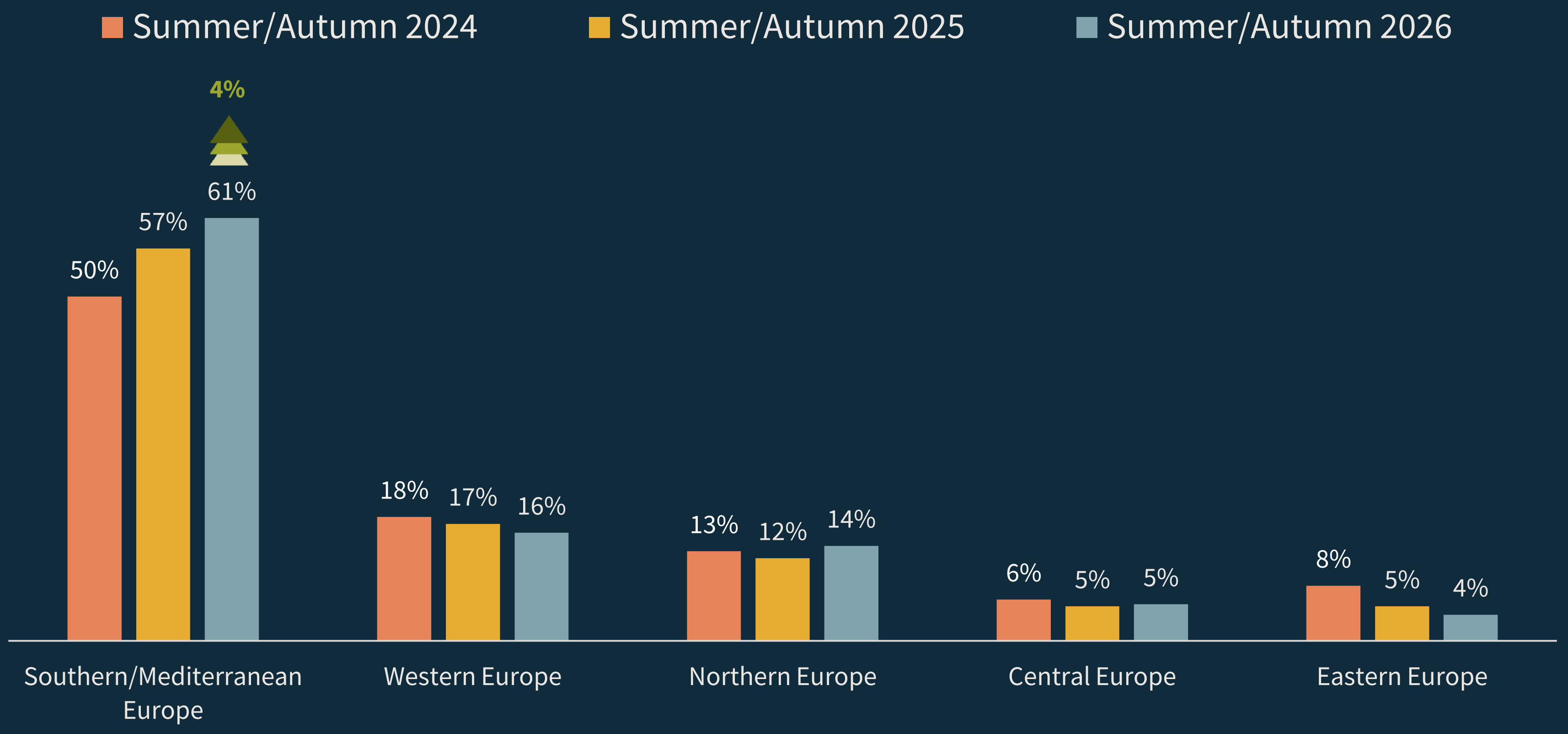


Q7. Where do you plan to travel in the next six months?

**Minor discrepancies in totals are the result of rounding

No. of respondents: 4,943

Mounting interest in Southern and Mediterranean Europe, now attracting over 3 in 5 Europeans



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 **Minor discrepancies in totals are the result of rounding

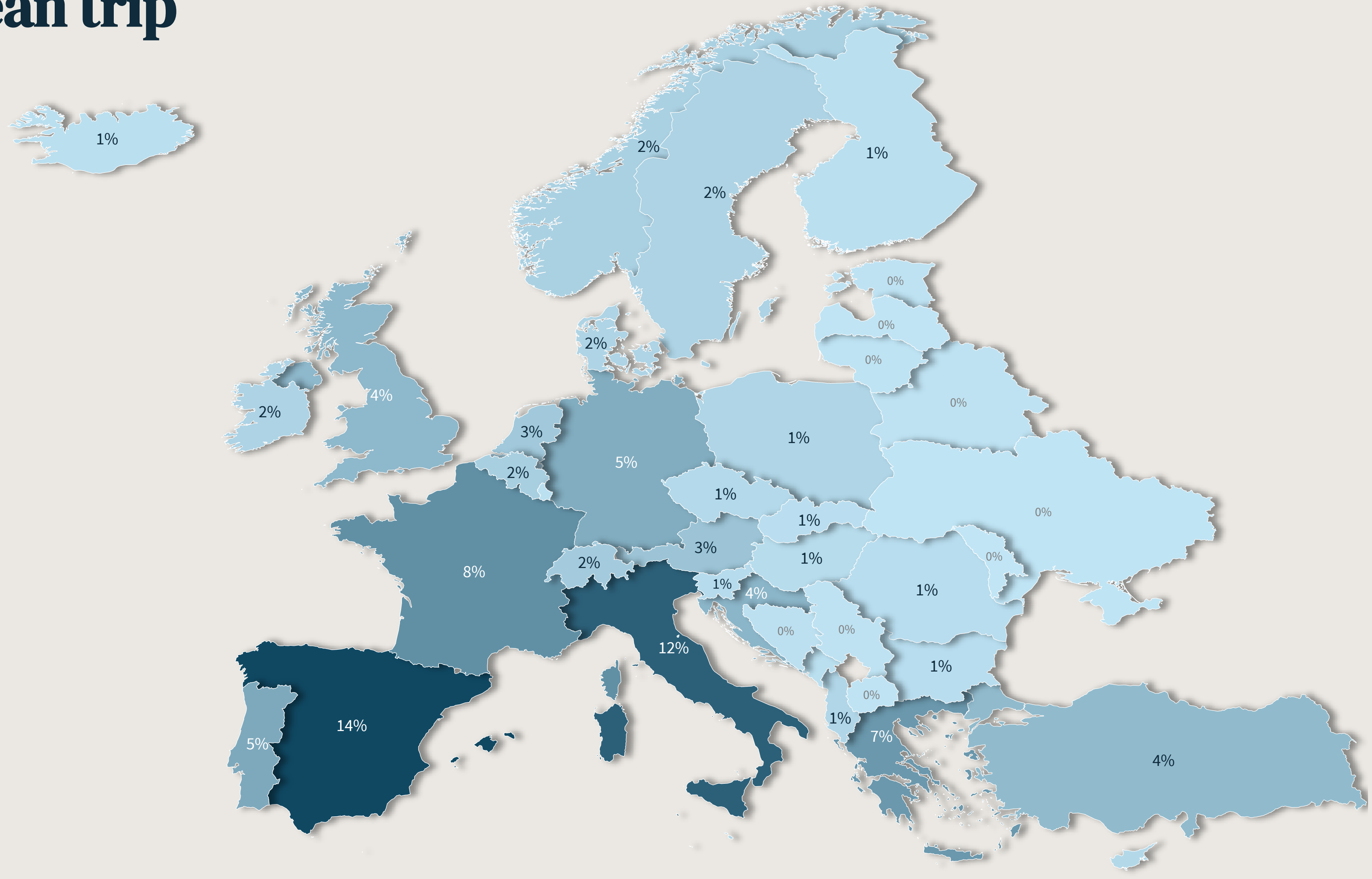
Q9. To which country(ies) do you plan to travel next?

No. of respondents: 4,703

Most popular countries for the next intra-European trip

TOP 10 COUNTRIES

Spain	**14%**
Italy	**12%**
France	**8%**
Greece	**7%**
Portugal	**5%**
Germany	**5%**
Croatia	**4%**
UK	**4%**
Türkiye	**4%**
Austria	**3%**



Q9. To which country(ies) do you plan to travel next?
**Minor discrepancies in totals are the result of rounding

No. of respondents: 4,703

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

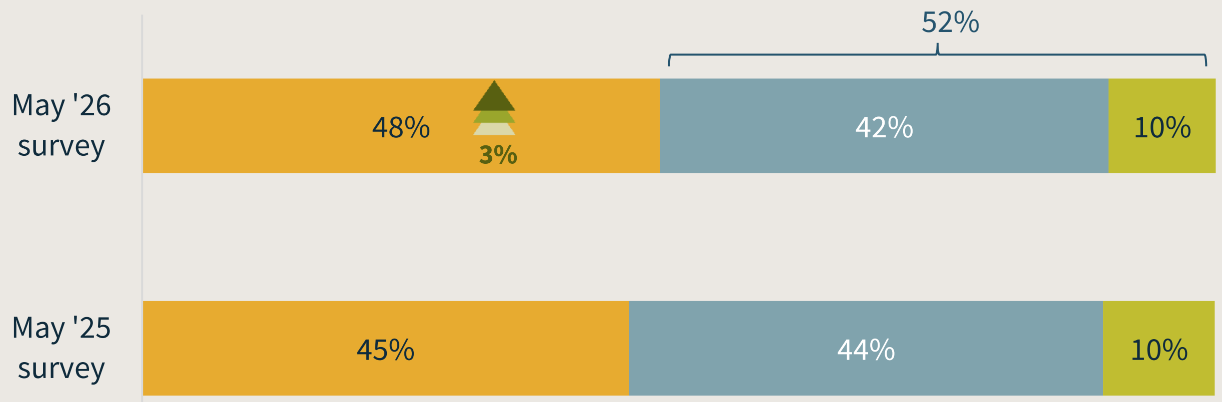
	Southern / Mediterranean Europe	Western Europe	Northern Europe	Central Europe	Eastern Europe
TOP-3 TYPES OF PREFERRED TRIPS	**39%** Sun & Beach **13%** Culture & Heritage **11%** City Break	**19%** City Break **18%** Nature & Outdoors **15%** Culture & Heritage	**19%** Culture & Heritage **19%** Nature & Outdoors **16%** City Break	**25%** City Break **23%** Culture & Heritage **13%** Nature & Outdoors	**24%** Sun & Beach **15%** Culture & Heritage **13%** City Break
MOST COMMON LENGTH OF STAY	**33%** 4-6 nights **32%** 7-9 nights	**43%** 4-6 nights **23%** 7-9 nights	**38%** 4-6 nights **31%** 7-9 nights	**43%** 4-6 nights **24%** 7-9 nights	**38%** 4-6 nights **31%** 7-9 nights
MOST COMMON BUDGET (per person)	**23%** 1001-1500 € **22%** 501-1000 €	**26%** 1001-1500 € **23%** 501-1000 €	**21%** 501-1000 € **20%** 1001-1500 €	**25%** 500-1000 € **20%** 1501-2000 €	**23%** 501-1000 € **21%** 1501-2000 €

Definitions of the regions can be seen in the Methodology
% indicates a statistically significant increase vs total travellers

No. of travellers per region: Southern Europe 2,895 | Western Europe 739 | Northern Europe 652 | Central Europe 249 | Eastern Europe 168
NOTE: Results on Eastern Europe should be treated with caution, due to small sample base

Interest in major tourist hot-spots increases this summer and autumn, while 52% look for less popular options

Type of destination for the coming trip



- A major tourist destination with well-known attractions
- A destination which is less popular among tourists
- A remote or 'off-the-beaten-track' destination

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 (May 2025)

No. of respondents: 4,943

Top five markets favouring tourism hotspots

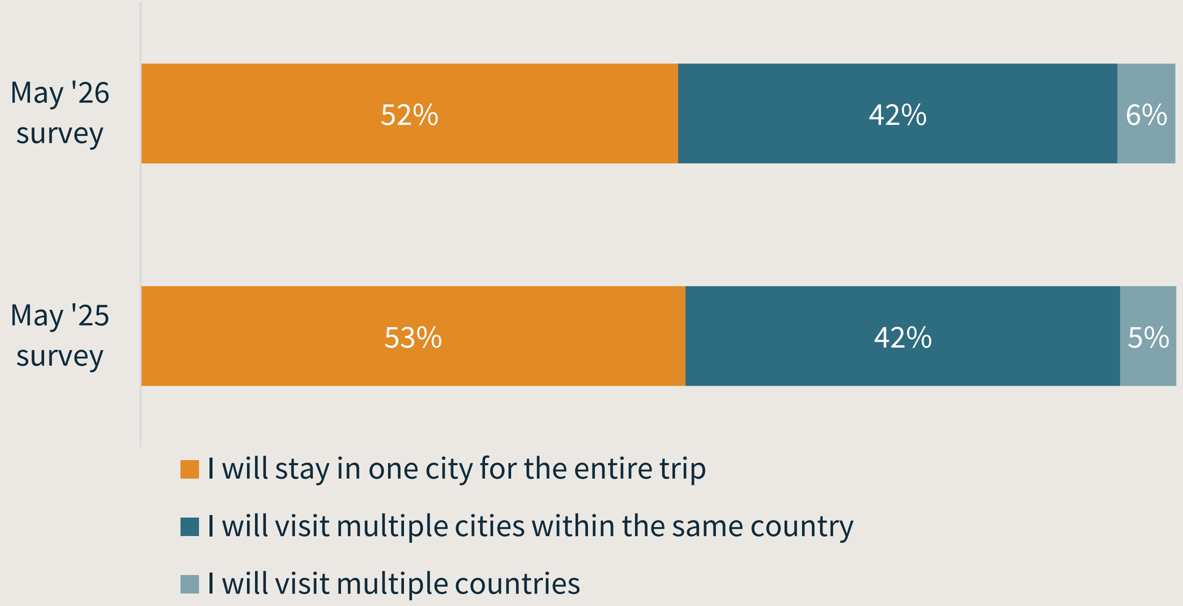
Italy	59%	8%
UK	55%	
Spain	55%	9%
France	48%	
Germany	47%	

Top five markets favouring lesser-known or remote locations

Switzerland	61%	
Netherlands	61%	
Poland	59%	
Belgium	56%	4%*
Austria	54%	8%*

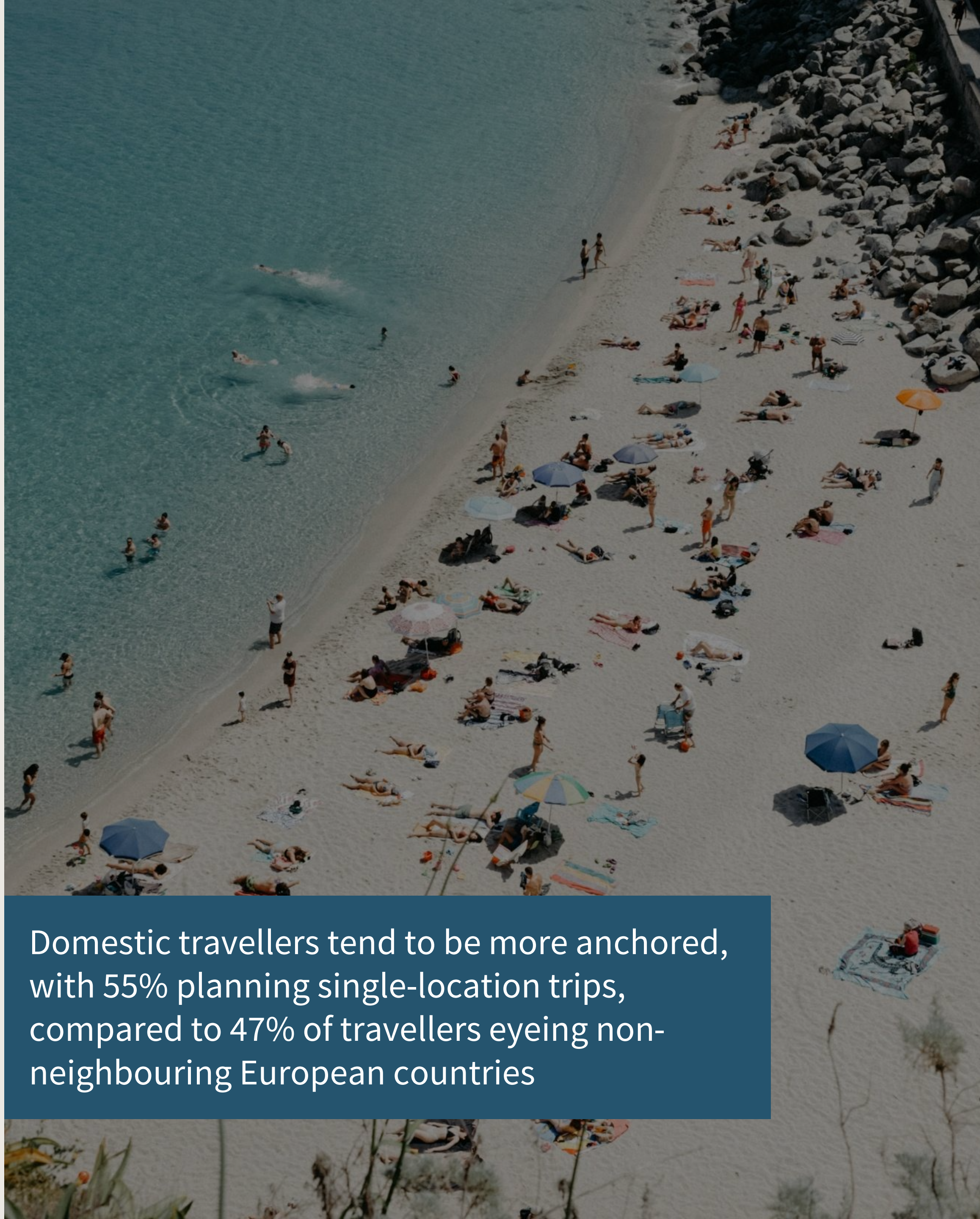
Over half of Europeans plan to stay in one destination for their entire trip

Planned itinerary for the next trip



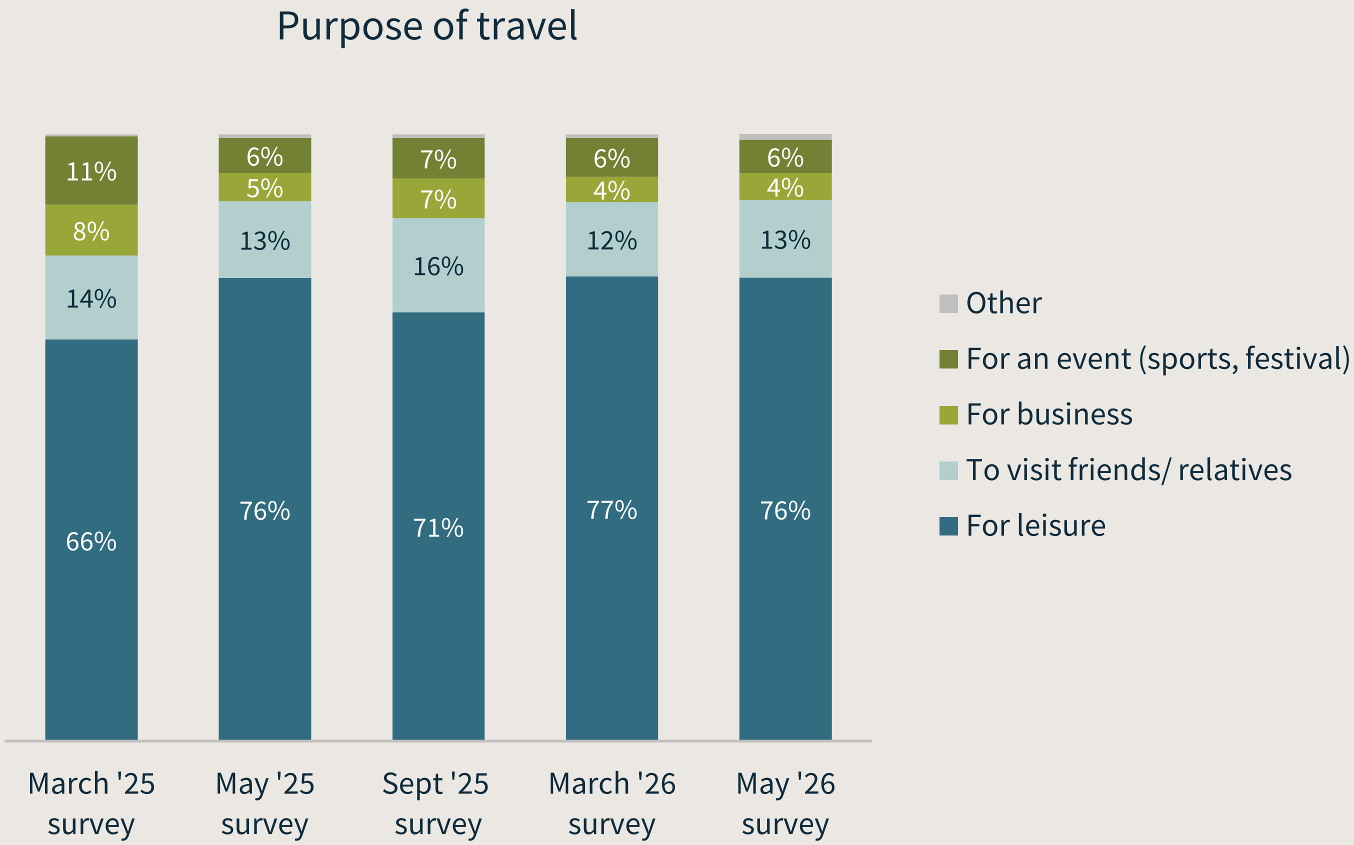
Q8. What kind of itinerary do you plan for your next trip within Europe?
* Statistically significant difference vs a year ago (May 2025)

No. of respondents: 4,943



Domestic travellers tend to be more anchored, with 55% planning single-location trips, compared to 47% of travellers eyeing non-neighbouring European countries

Nearing summer, strong leisure travel performance is on par with last year



Q5. For what reason are you most likely to travel within Europe next?
Minor discrepancies in totals are the result of rounding

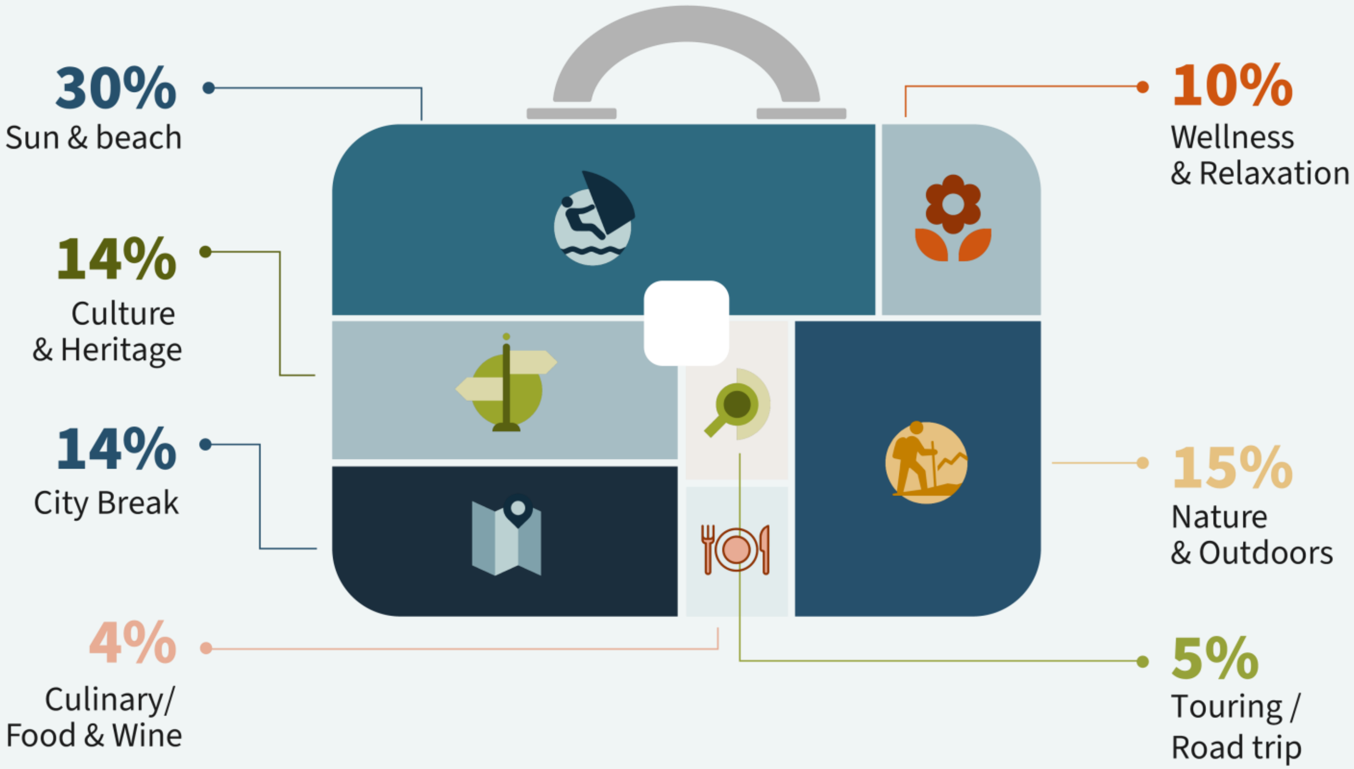
No. of respondents: 4,943

Top three markets to take a leisure trip	Top three markets to take a business trip
Netherlands 84%	**Spain** 6%
Poland 83%	**Germany** 6%
UK 80%	**Austria** 5%

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

Sun & Beach holidays remain Europeans' top pick, boosting demand for Southern and Mediterranean destinations

Preferred type of leisure trip in the next six months



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

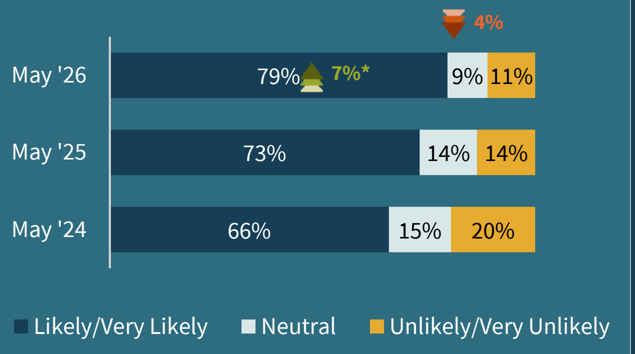
No. of respondents: 4,943

Sun & Beach holidaymakers show stronger spending intent, with 46% planning to spend over €1,500, compared to 37% of Nature & Outdoor travellers and 33% of City Breakers.

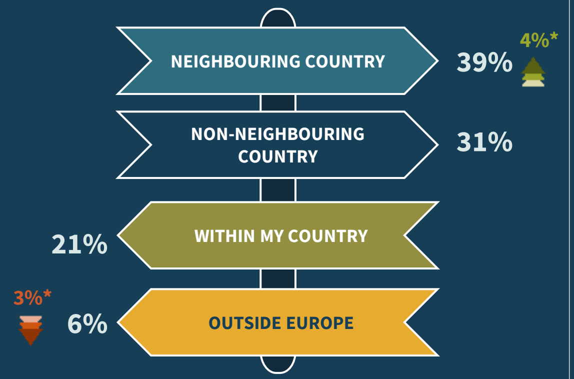
Austrians' travel plans

Travel horizon: June-November 2026

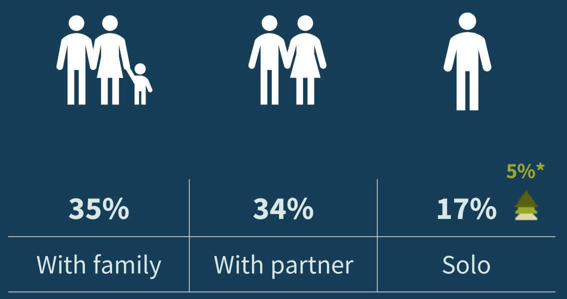
INTENTION TO TRAVEL



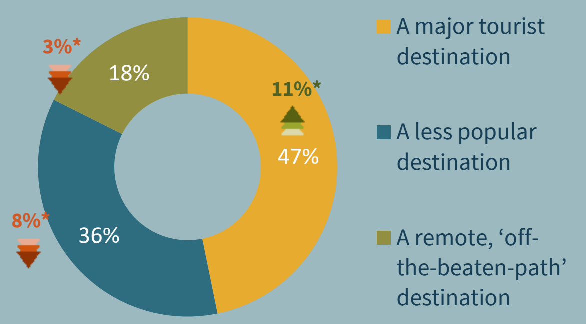
WHERE TO?



TRAVELLING WITH?



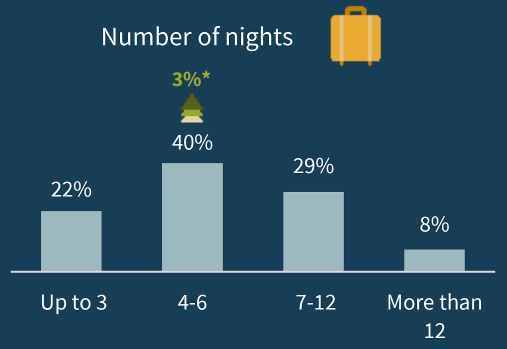
TYPE OF DESTINATION

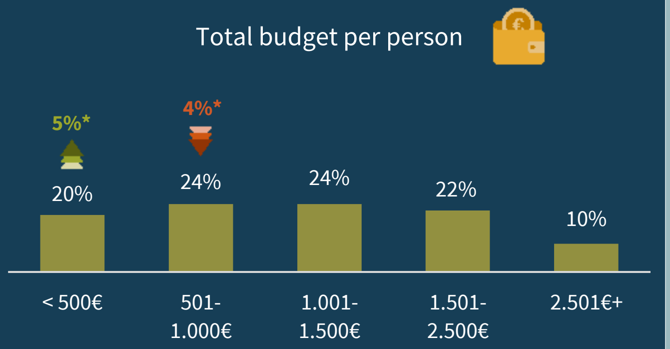


TOP SPENDING PRIORITIES

36%	Accommodation
22%	Food & Drinks
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	20% 5%*
Croatia	12%
Germany	9%
Spain	7%
Greece	5%

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

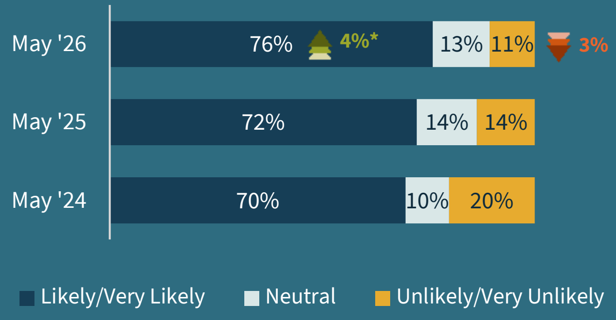
* Statistically significant difference vs a year ago (May 2025)

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

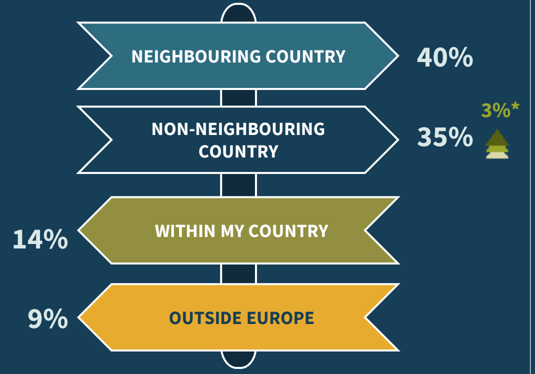
Belgians' travel plans

Travel horizon: June-November 2026

INTENTION TO TRAVEL



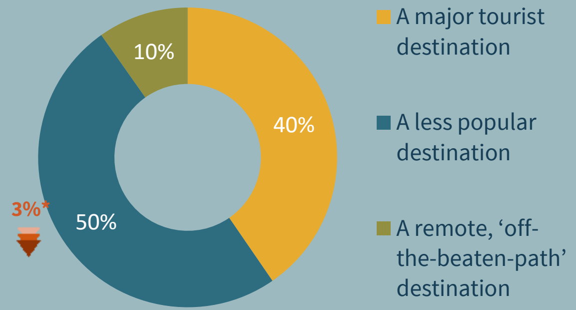
WHERE TO?



TRAVELLING WITH?

42%	35%	13% (3%*)
With family	With partner	Solo

TYPE OF DESTINATION

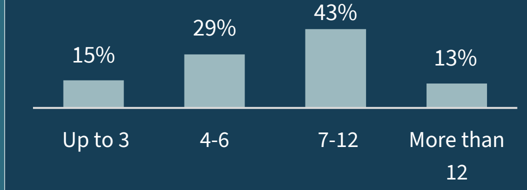


TOP SPENDING PRIORITIES

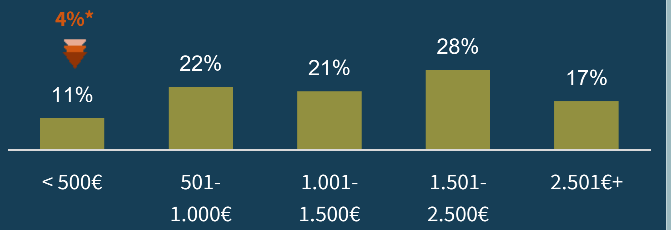
27%	Accommodation	4%*
23%	Food & Drinks	4%*
19%	Activities at the destination	5%*

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
France	18%	
Spain	16%	3%*
Italy	11%	3%*
Greece	7%	
Portugal	7%	

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

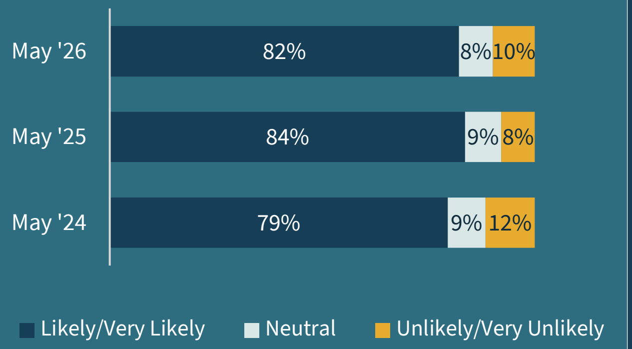
* Statistically significant difference vs a year ago (May 2025)

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

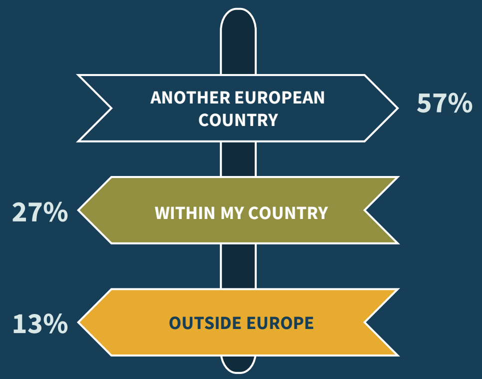
Britons’ travel plans

Travel horizon: June-November 2026

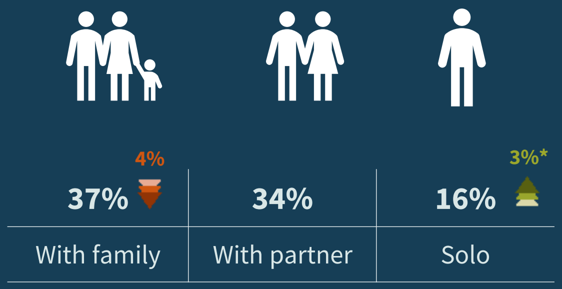
INTENTION TO TRAVEL



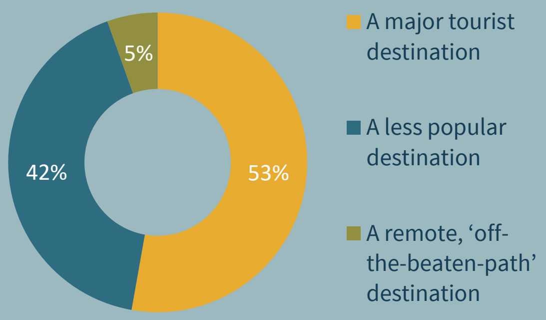
WHERE TO?



TRAVELLING WITH?

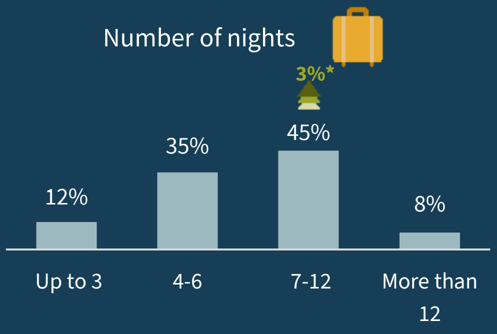


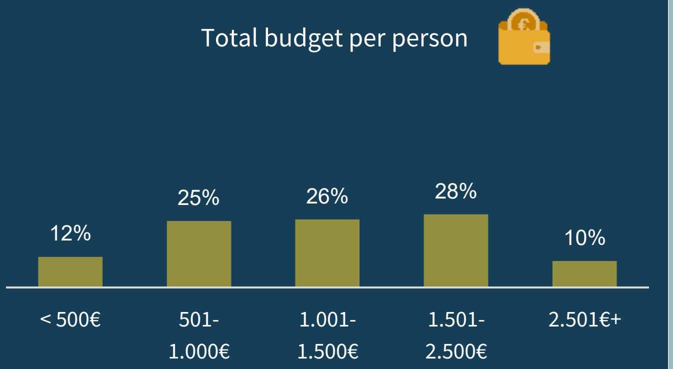
TYPE OF DESTINATION



TOP SPENDING PRIORITIES

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	19%
Italy	10%
Greece	9%
France	8%
Portugal	5%

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

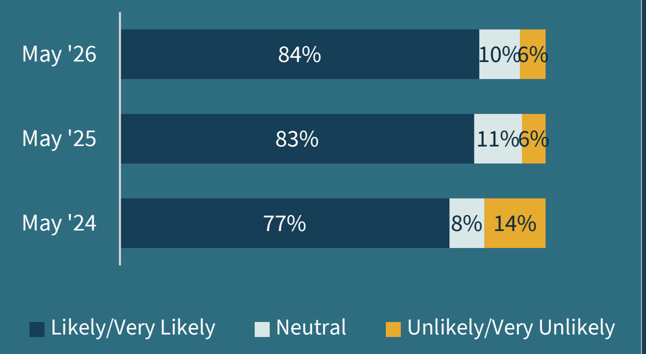
* Statistically significant difference vs a year ago (May 2025)

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

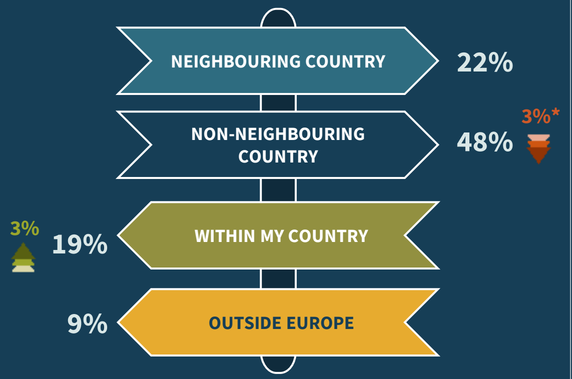
Dutch travel plans

Travel horizon: June-November 2026

INTENTION TO TRAVEL



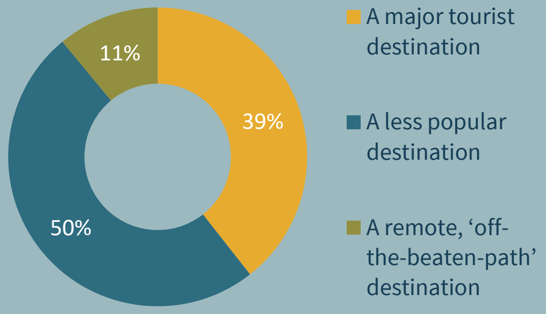
WHERE TO?



TRAVELLING WITH?

50% (3%*)	26%	13%
With partner	With family	Solo

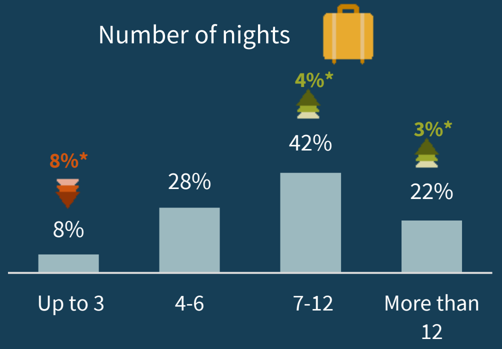
TYPE OF DESTINATION

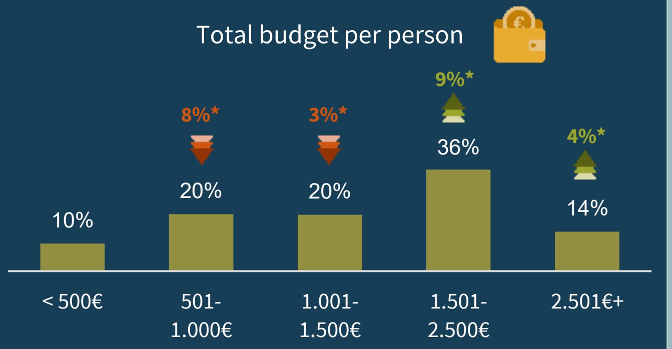


TOP SPENDING PRIORITIES

32%	Accommodation
28%	Food & Drinks
12%	Activities at the destination 4%*

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	16%
Germany	12%
Italy	9%
France	9%
Belgium	6%

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

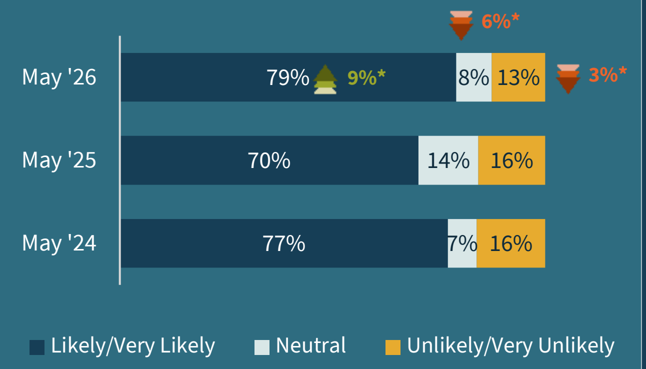
* Statistically significant difference vs a year ago (May 2025)

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

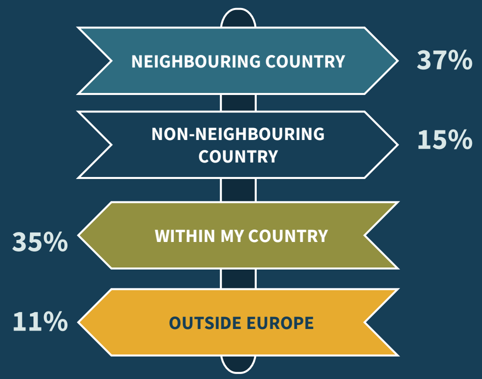
French travel plans

Travel horizon: June-November 2026

INTENTION TO TRAVEL



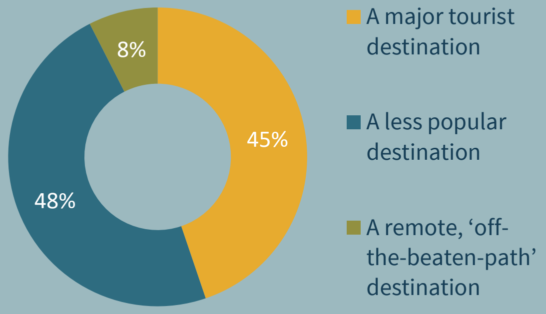
WHERE TO?



TRAVELLING WITH?

38%	37%	12%
With family	With partner	Solo

TYPE OF DESTINATION

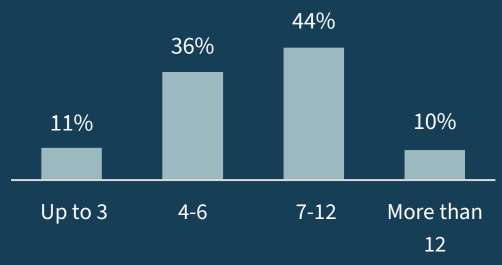


TOP SPENDING PRIORITIES

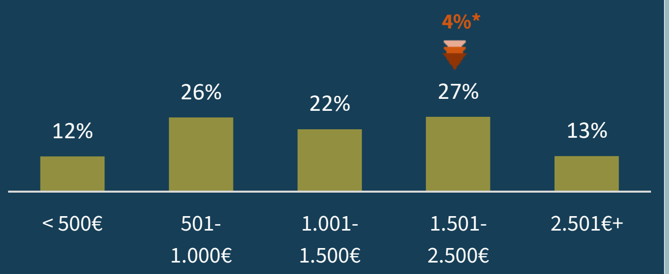
31%	Accommodation
21%	Food & Drinks
16%	Activities at the destination 3%*

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	16%
Italy	15% 3%*
Greece	8%
Portugal	7%
UK	6%

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

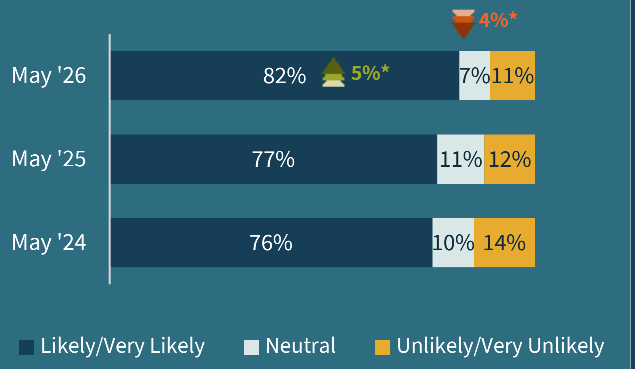
* Statistically significant difference vs a year ago (May 2025)

No. of respondents: 826 (total sample of respondents per country)

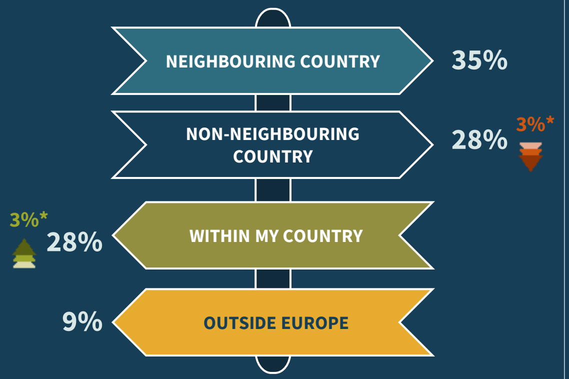
Germans' travel plans

Travel horizon: June-November 2026

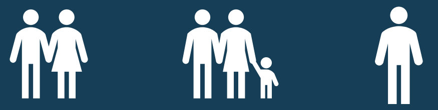
INTENTION TO TRAVEL



WHERE TO?

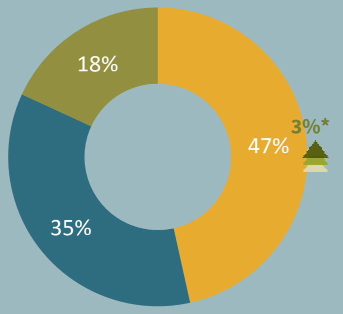


TRAVELLING WITH?



38%	33%	18% (3%*)
With partner	With family	Solo

TYPE OF DESTINATION

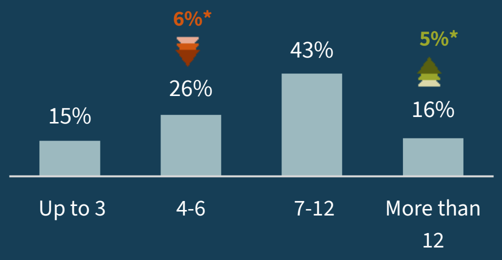


TOP SPENDING PRIORITIES

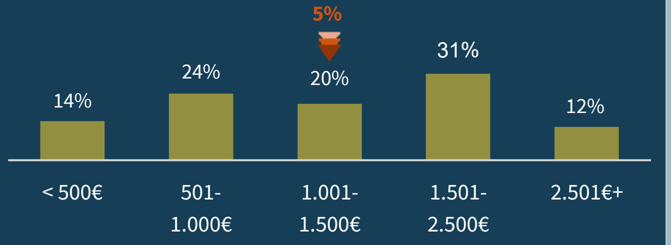
35%	Accommodation	10%*
20%	Food & Drinks	
15%	Activities at the destination	3%*

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	14%
Italy	11%
Greece	6%
France	6%
Netherlands	6%

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

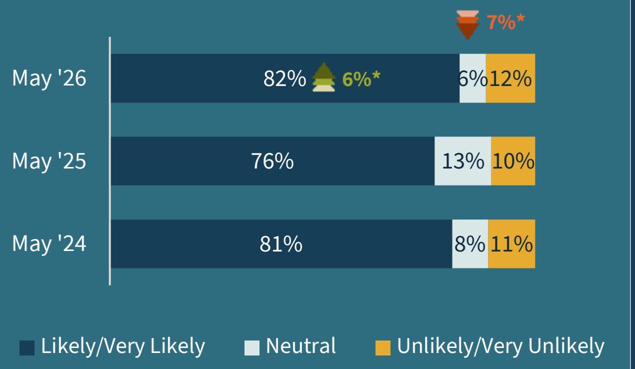
* Statistically significant difference vs a year ago (May 2025)

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

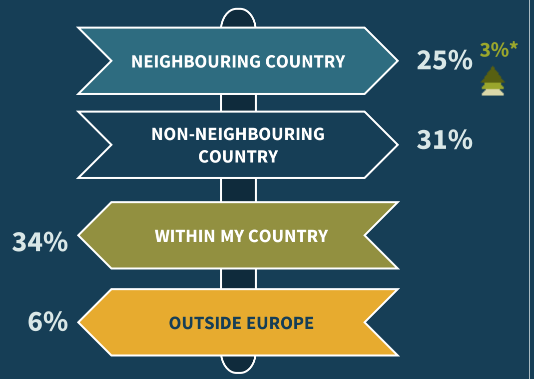
Italians’ travel plans

Travel horizon: June-November 2026

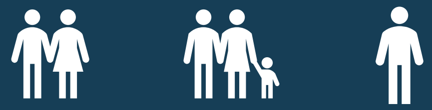
INTENTION TO TRAVEL



WHERE TO?

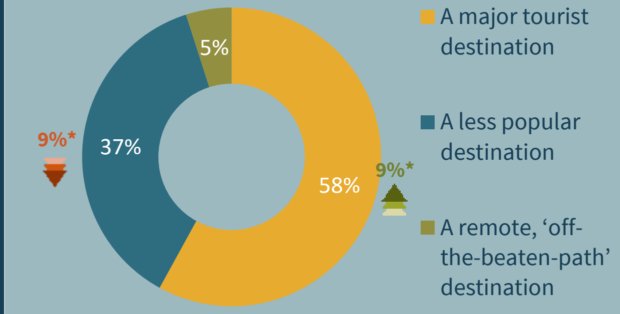


TRAVELLING WITH?



39%	37%	10%
With partner	With family	Solo

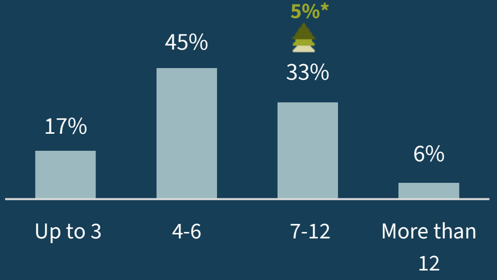
TYPE OF DESTINATION

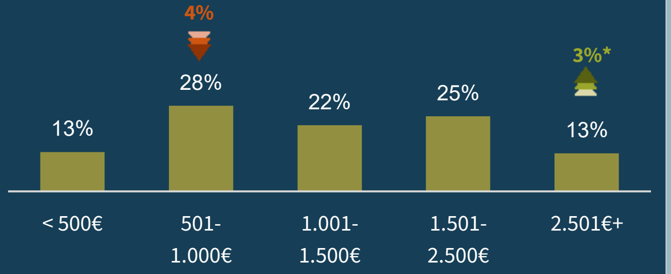


TOP SPENDING PRIORITIES

29%	Accommodation
23%	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	20% 3%*
France	9%
Greece	8% 3%*
UK	7%
Portugal	5%

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

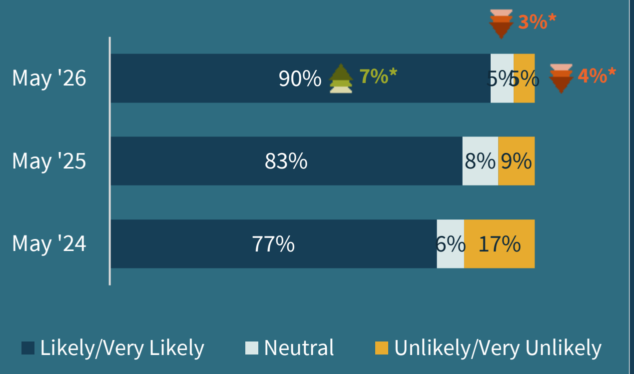
* Statistically significant difference vs a year ago (May 2025)

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

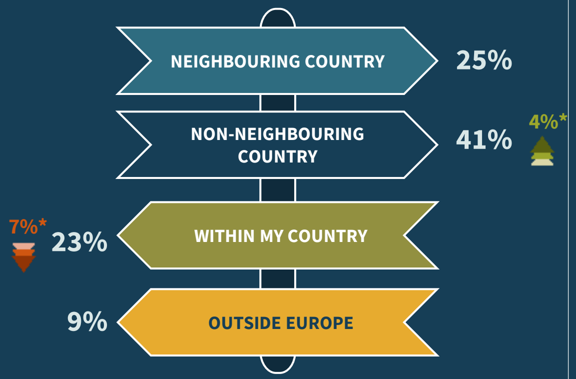
Poles' travel plans

Travel horizon: June-November 2026

INTENTION TO TRAVEL



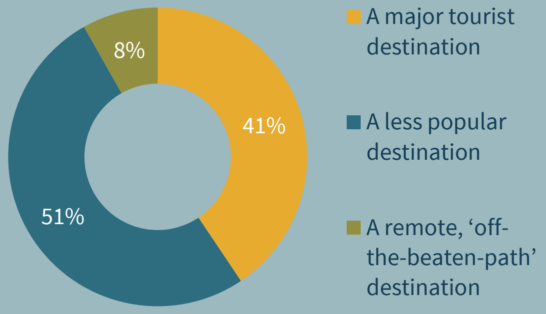
WHERE TO?



TRAVELLING WITH?

50%	29%	9%
With family	With partner	Solo

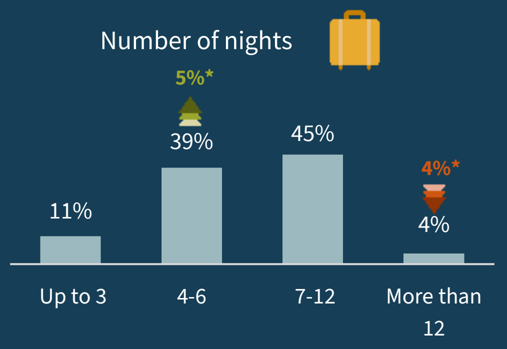
TYPE OF DESTINATION

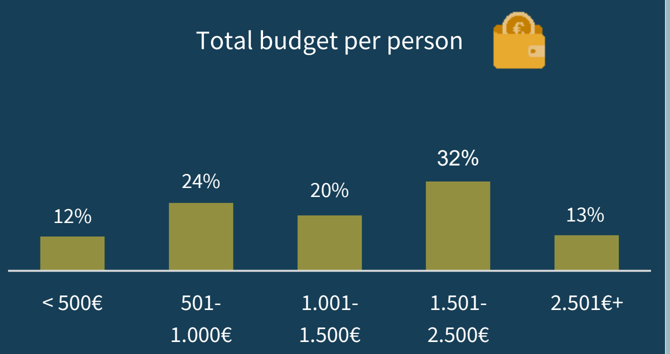


TOP SPENDING PRIORITIES

29%	Accommodation 5%*
25%	Food & Drinks
20%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	13% 4%*
Italy	11%
Croatia	9%
Greece	8%
Türkiye	6%

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

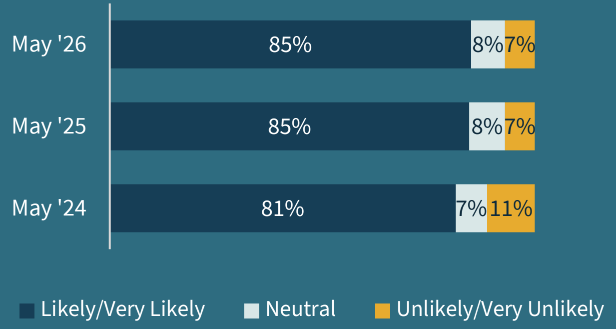
* Statistically significant difference vs a year ago (May 2025)

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

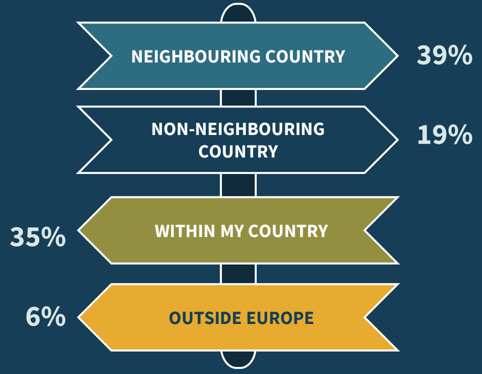
Spaniards' travel plans

Travel horizon: June-November 2026

INTENTION TO TRAVEL



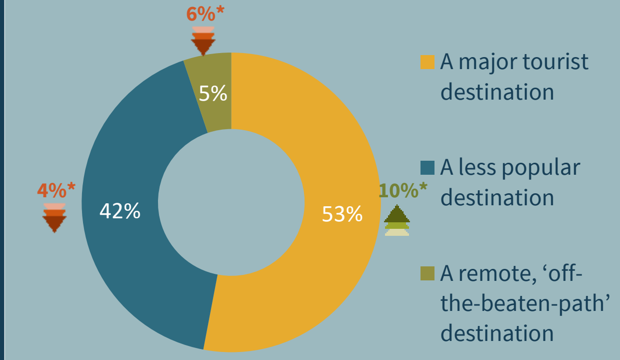
WHERE TO?



TRAVELLING WITH?

42%	37% 3%*	6%
With partner	With family	Solo

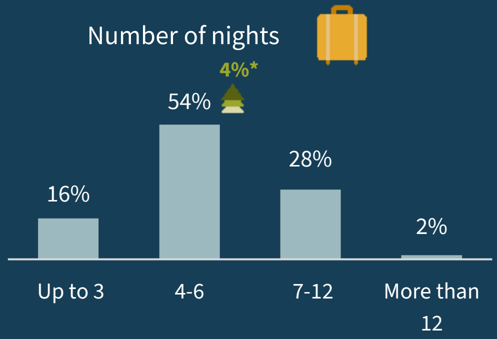
TYPE OF DESTINATION

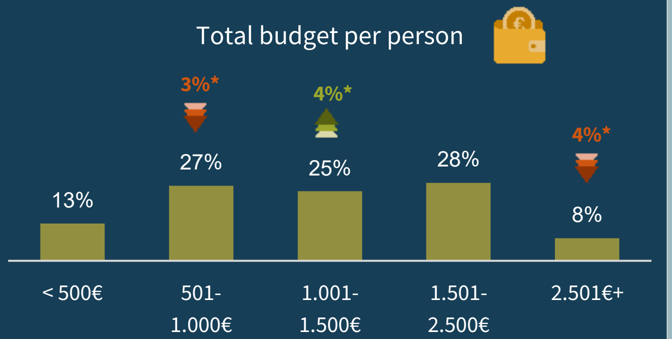


TOP SPENDING PRIORITIES

31%	Accommodation	
27%	Food & Drinks	3%*
17%	Activities at the destination	

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
Italy	19%	7%*
France	12%	3%*
Portugal	10%	
Germany	7%	
UK	6%	

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

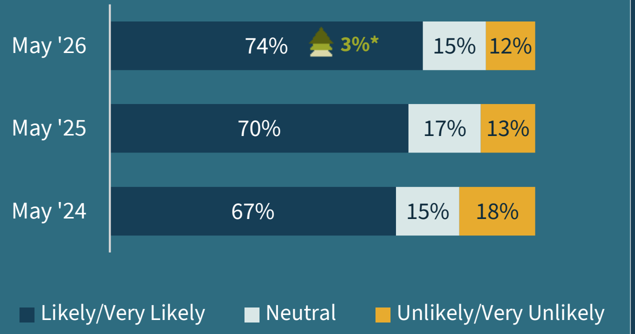
* Statistically significant difference vs a year ago (May 2025)

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

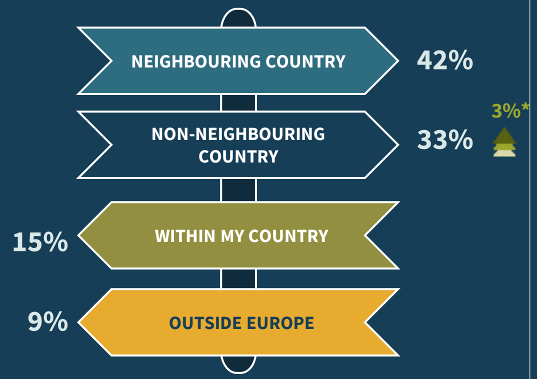
Swiss travel plans

Travel horizon: June-November 2026

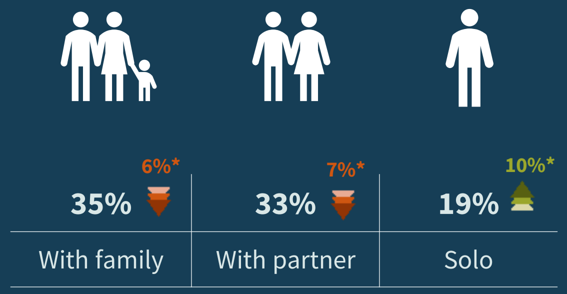
INTENTION TO TRAVEL



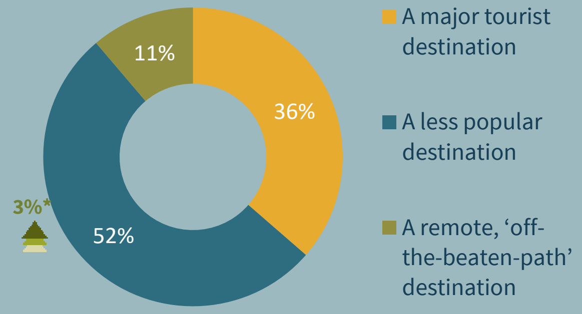
WHERE TO?



TRAVELLING WITH?



TYPE OF DESTINATION

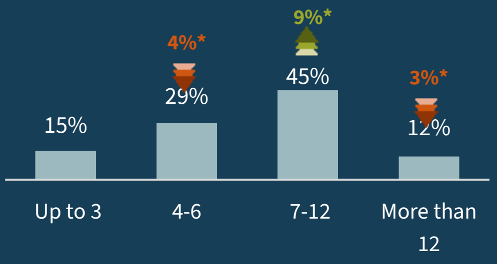


TOP SPENDING PRIORITIES

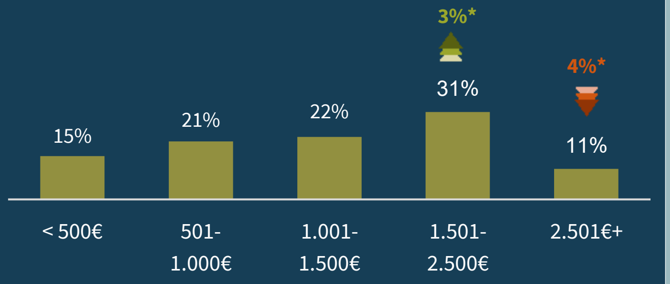
28%	Accommodation 3%*
24%	Food & Drinks
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	17%
France	11%
Spain	11%
Germany	11%
Greece	6%

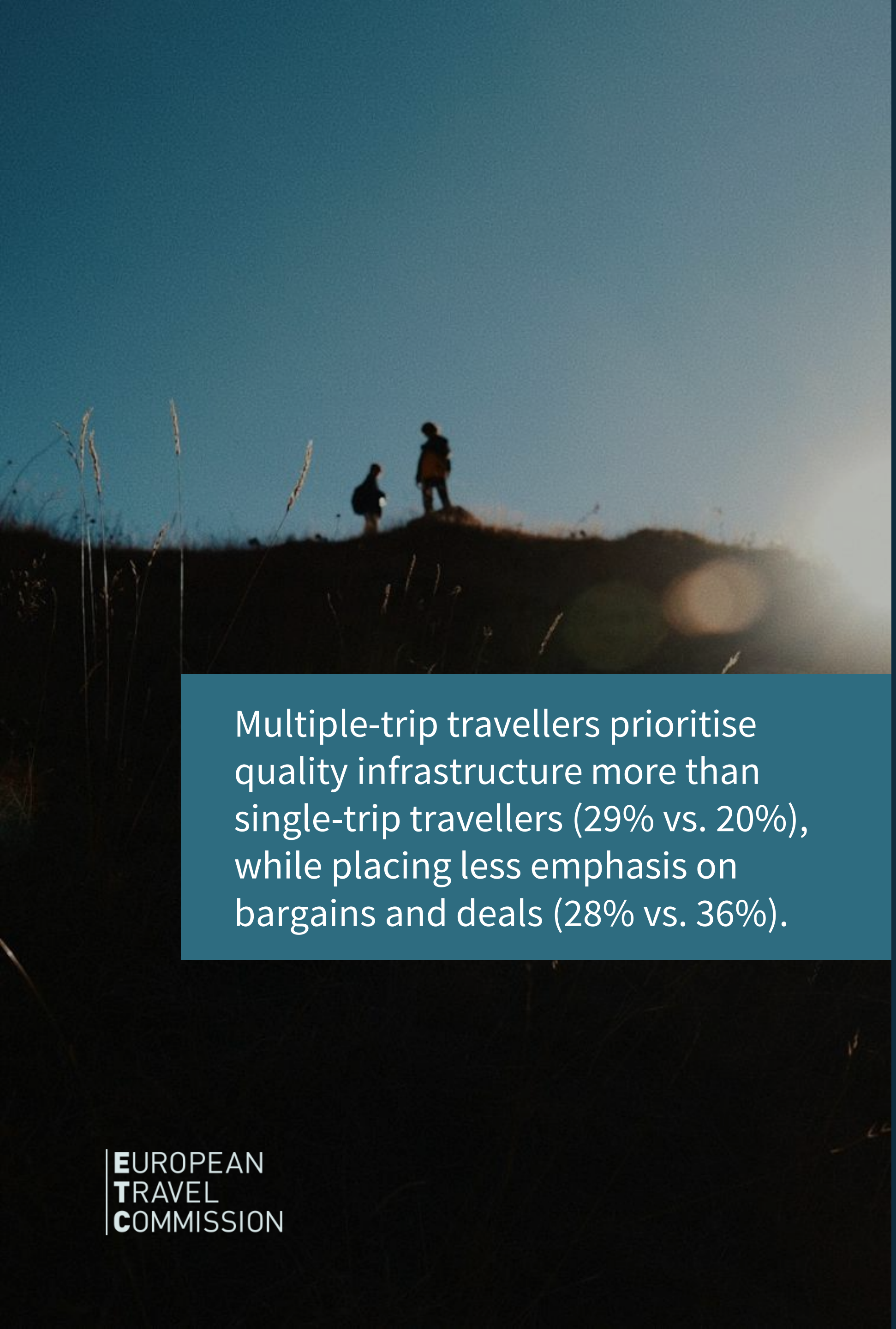
** Based on total sample, without reference to domestic trips

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

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

Planning the details

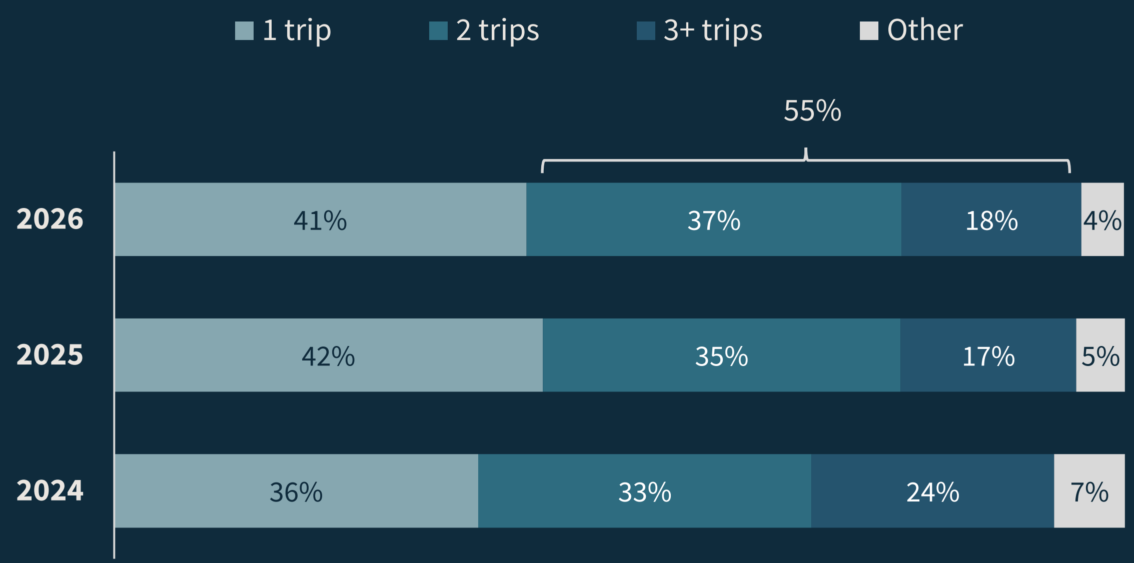
02



Over half of European travellers will take 2+ trips, signalling a strong travel season ahead

Multiple-trip travellers prioritise quality infrastructure more than single-trip travellers (29% vs. 20%), while placing less emphasis on bargains and deals (28% vs. 36%).

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?

Minor discrepancies in totals are the result of rounding

No. of respondents: 4,943

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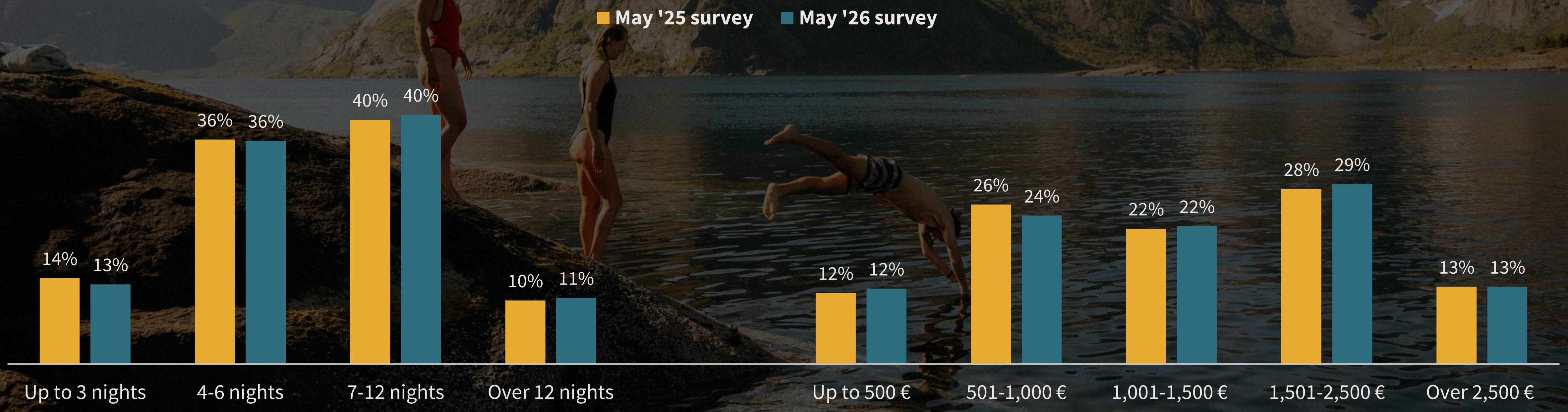
Summer travel plans remain remarkably stable year-on-year

Most summer trips are planned for 4–12 nights with budgets between €1,000 and €2,500

Intended length of stay

Total planned budget per person

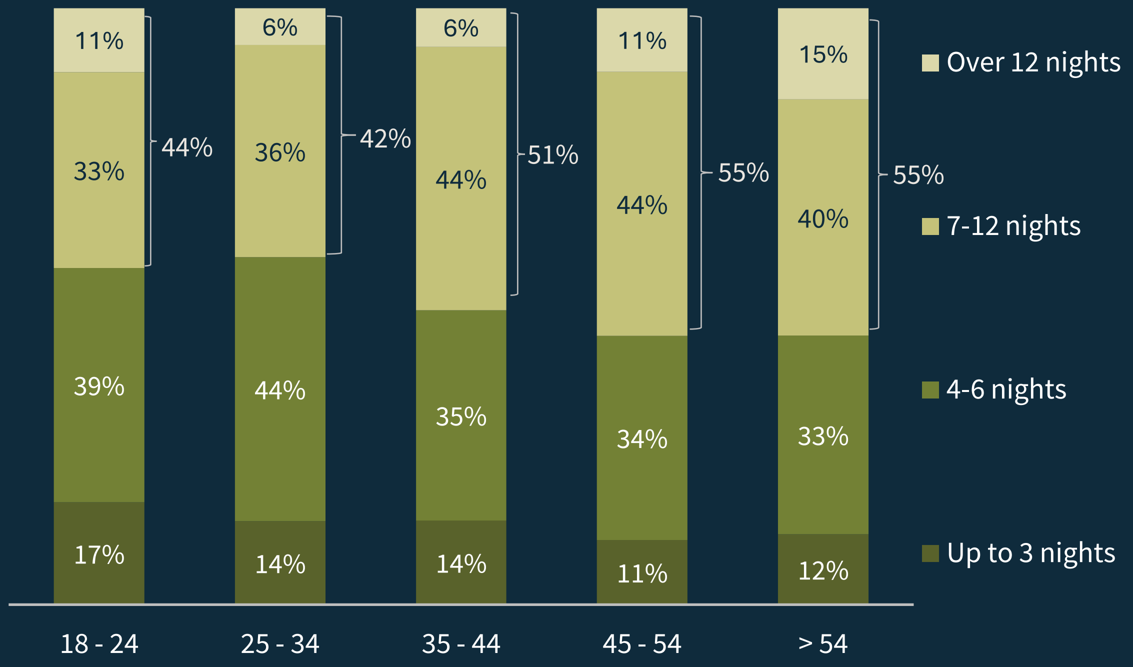


Q15. What would be the length of your next overnight trip?
Q16. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?
Minor discrepancies in totals are the result of rounding

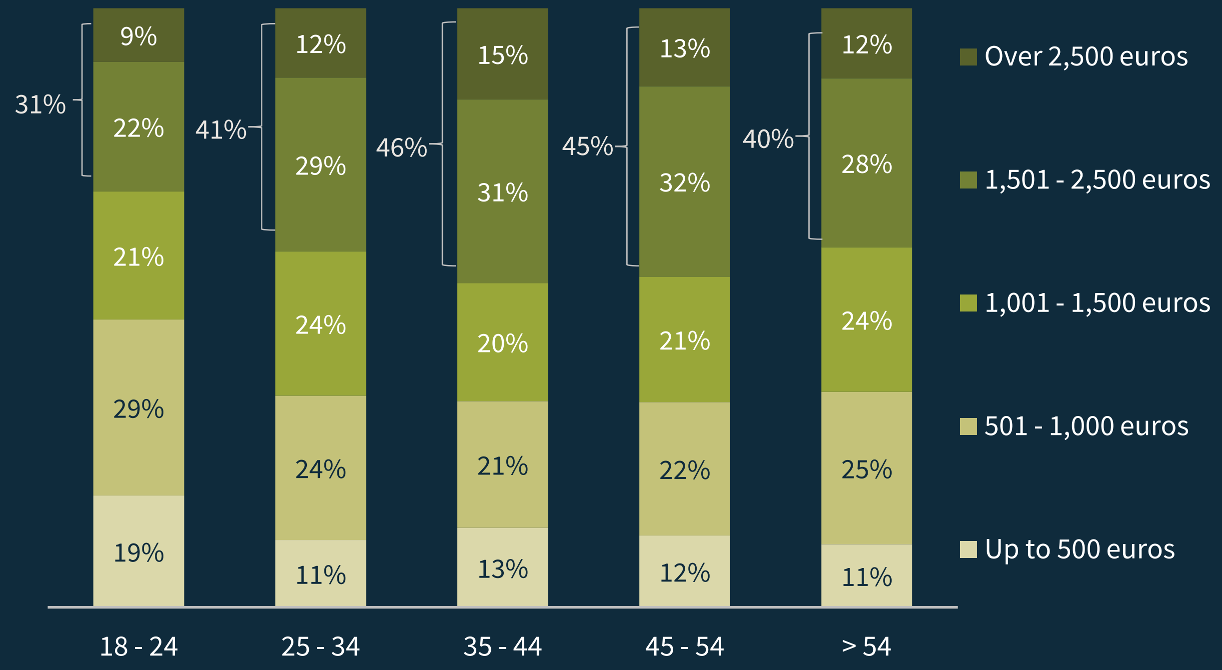
No. of respondents: 4,943

Travellers 35-54 combine longer stays with higher planned budgets this summer and autumn

Intended length of stay by age group (nights)



Projected budget by age group (euros)

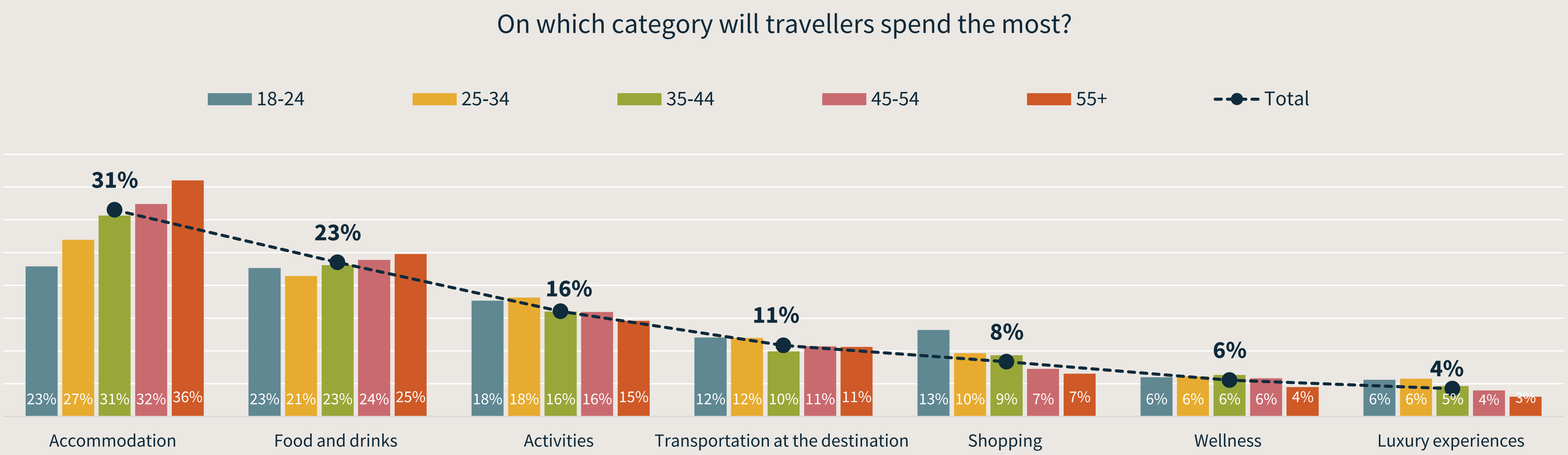


The budget is per person per trip, including accommodation, transportation and travel activities

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)?
Minor discrepancies in totals are the result of rounding

No. of respondents: 4,943

More than half of Europeans' travel budgets go to accommodation and food



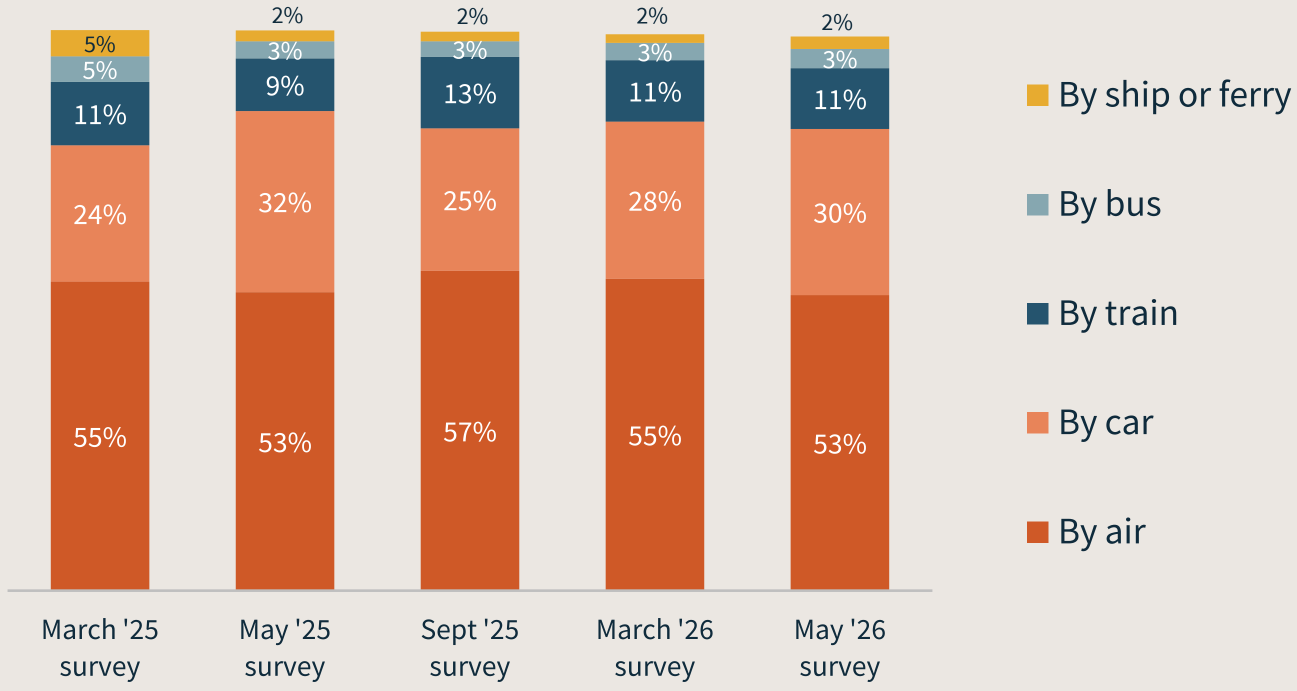
Culture & Heritage travellers are more activity-led, with 44% citing activities as a top spending category, compared to 25% of Sun & Beach holidaymakers

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

No. of respondents: 4,943

Air travel demand prevails despite hike in jet fuel costs

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 (May 2025)

Top three reasons for flying	Top three reasons for driving
Speed 30%	**Comfort** 28% ▲7%*
Value for money 22%	**Easy to plan & book** 21% ▲3%*
Comfort 15%	**Value for money** 19%

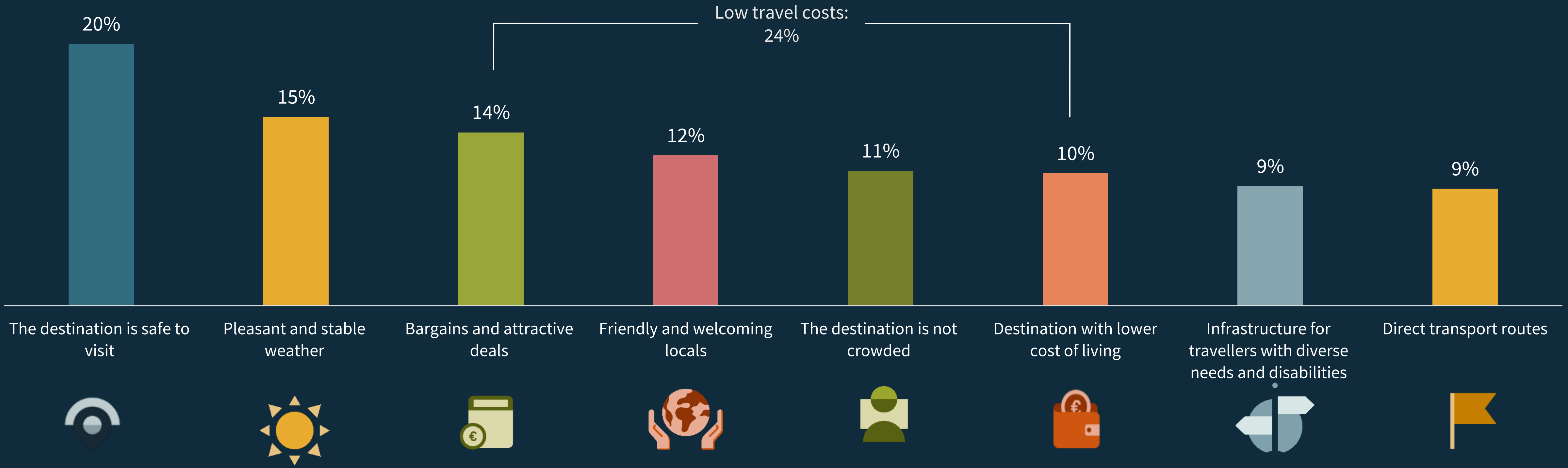
No. of respondents: 4,943

Travel considerations

03

Safety, pleasant weather and affordability remain key drivers of Europeans’ destination choices

Europeans’ top criteria in choosing a travel destination



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

No. of respondents: 6,076

What do European travellers worry about?

Rising trip costs and personal finance remain travellers' top concerns, followed by growing worries over the Middle East conflict

22%
Rise in the overall cost of my trip due to inflation

17%
Economic situation and personal finances

14% ▲ 7%*
Potential impact on travel safety due to tensions in the Middle East

11%
The ongoing conflict between Russia and Ukraine

10%
Disruptions in transport options due to strikes or under-staffing

9% ▼ 3%*
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

Sun & Beach travellers show heightened concern over the Middle East conflict (33% vs. 7% across other trip types), likely linked to their greater reliance on air travel (61%).

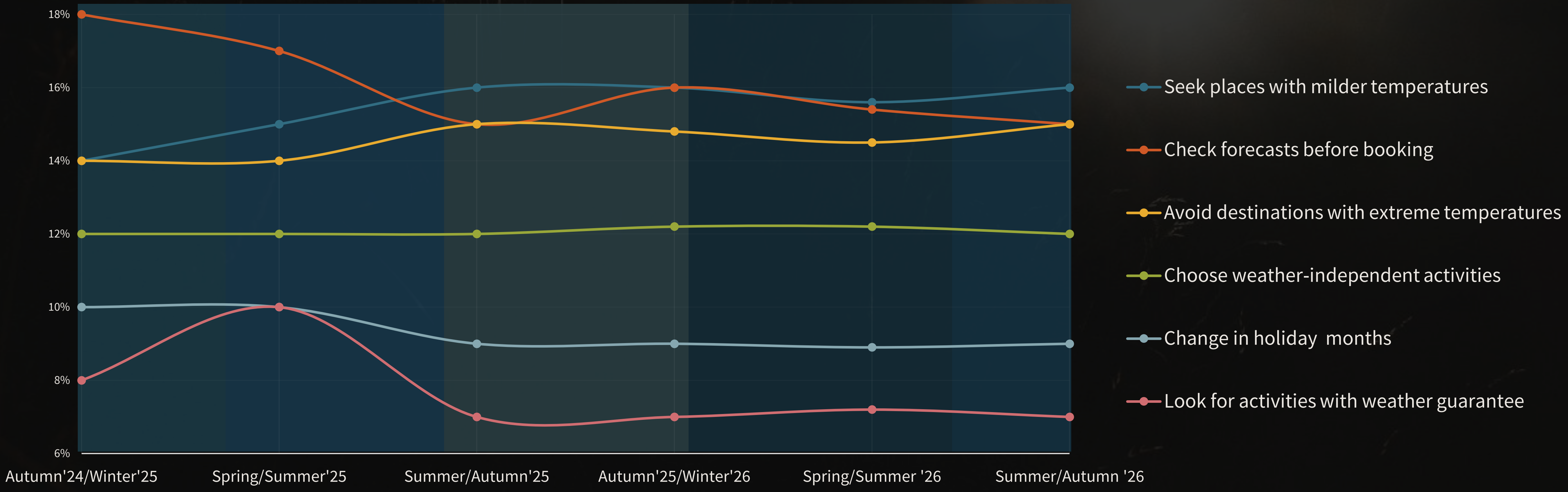
* Statistically significant difference vs a year ago (May 2025)

No. of respondents: 6,076

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

In response to the climate crisis, travellers seek milder temperatures, avoid extreme heat and check weather forecasts

Climate adaptation behaviours across travel seasons

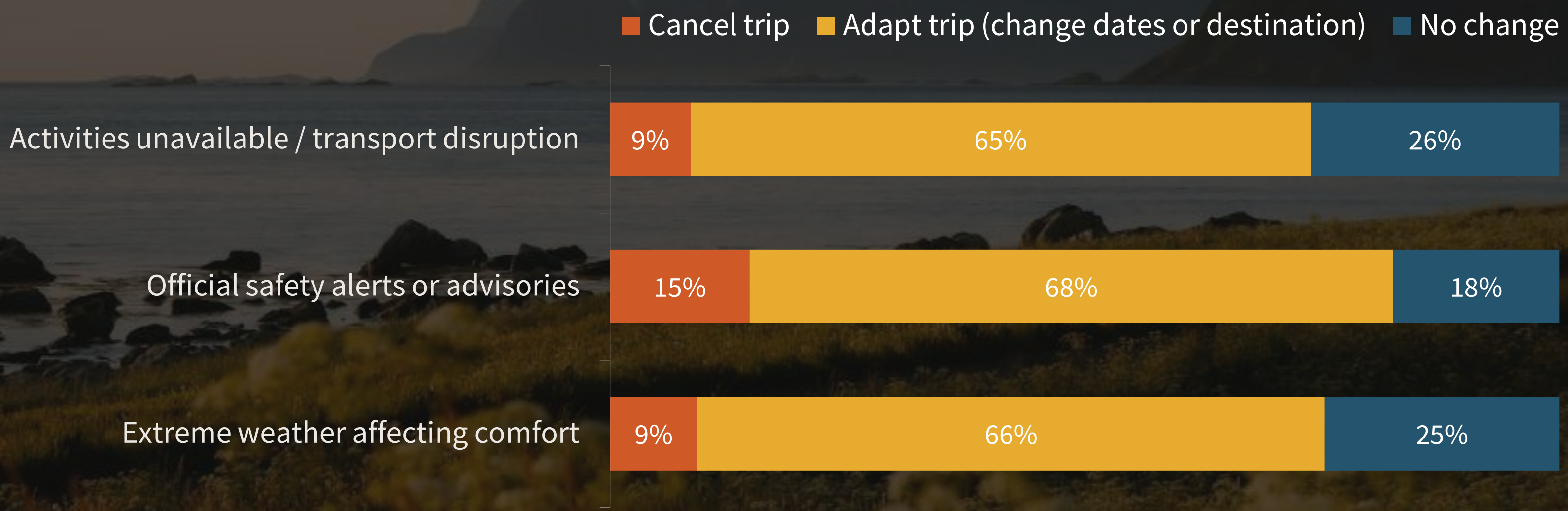


Q19. How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) been influencing your travel habits?

No. of respondents: 6,076

Two in three Europeans would adapt their trip in response to climate-related disruptions, with official safety alerts the most triggering

Intended response to climate-related disruptions



Intended responses to safety alerts remain similar across trip types, suggesting that travellers' reactions are shaped by personal risk perceptions regardless of the type of trip planned.

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: 6,076

Responsible travel behaviours panel

Visiting less touristic destinations and staying longer are Europeans’ go-to ways to travel more sustainably

- **52%** Intend to visit less touristy, off-the-beaten-track destinations
- **51%** Plan to stay at their next destination(s) for 7 nights or longer
- **11%** Opt to travel by train to their next destination
- **11%** Consider how crowded a destination is
- **4%** Worry about the environmental footprint of their trip

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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 (2023-2025/26)
- Distribution/data collection period:
  - **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 / **Wave 25**: 16-30 May 2026, sample = 6,076
  - **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)
- 52% of the Wave 25 survey respondents are male and 48% 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	68	81	47	53	43	51	20	**565**
25 - 34	136	112	73	79	140	101	117	66	106	77	**1,007**
35 - 44	126	134	103	130	158	135	139	100	108	86	**1,219**
45 - 54	138	168	105	97	158	172	98	121	91	102	**1,250**
≥55	262	266	175	126	289	295	93	170	144	215	**2,035**
Total	**750**	**750**	**500**	**500**	**826**	**750**	**500**	**500**	**500**	**500**	**6,076**

- **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.

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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