
Press Release

Travel demand remains strong as safety and value shape Europeans' holiday choices

- More than four in five Europeans (81%) plan to travel between June and November 2026, up four percentage points compared to last year.
- Safety, affordability and climate considerations are shaping destination choices for the next six months.
- Most Europeans plan to holiday within Europe, while Southern and Mediterranean Europe continues to lead in travel demand.

Brussels, 2 July 2026: Europeans continue to prioritise travel despite economic pressures, geopolitical tensions and climate-related challenges. According to the European Travel Commission's (ETC) latest *Monitoring Sentiment for Intra-European Travel (Wave 25)*, 81% of Europeans intend to take a trip between June and November 2026, four percentage points higher than during the same period last year.

Travel intentions have increased across nearly all age groups, reaching their highest level among travellers aged 45–54 (86%). Europeans also continue to favour travel within the region, with almost two-thirds (64%) planning trips across Europe and more than half (55%) intending to take two or more holidays over the next six months.

Southern Europe remains Europe's favourite, while travellers seek more balanced experiences

Southern and Mediterranean Europe continues to be Europeans' preferred holiday region, attracting 61% of intended travellers, up four percentage points compared to last year. Spain (14%), Italy (12%), France (8%) and Greece (7%) remain the most popular destinations, reflecting continued demand for sun-and-beach holidays, followed by culture and city experiences.

Travellers are also becoming more selective about the type of experiences they seek. While interest in major tourist destinations has increased slightly to 48%, most Europeans (52%) prefer lesser-known or off-the-beaten-path destinations. Additionally, 11% say avoiding crowded destinations is an important factor in choosing where to travel, while 9% cite overcrowding as one of their main travel concerns.

These findings suggest that Europe's established destinations continue to enjoy a strong appeal, while travellers are increasingly looking for opportunities to experience them in different ways, whether by exploring beyond the main attractions or discovering lesser-known places.

Safety, affordability and geopolitics increasingly influence travel decisions

While Europeans remain eager to travel, they are weighing a broader range of factors before choosing their destination.

Safety remains the most important consideration, cited by 20% of travellers, followed by pleasant weather (15%) and attractive deals (14%). Financial considerations also continue to play a central role, with rising trip costs

(22%) and personal finances (17%) remaining Europeans' biggest travel concerns.

Geopolitical developments are also playing a greater role in travel decisions. Worries linked to the conflict in the Middle East have doubled compared to last year, increasing from 7% to 14%, while 11% of Europeans remain concerned about the war in Ukraine. Despite higher fuel prices and the resulting pressure on travel costs, air travel remains the preferred mode of transport, chosen by 53% of travellers.

Climate increasingly shapes where and how Europeans travel

Climate considerations are becoming an integral part of travel planning. More than three-quarters (76%) of Europeans say climate-related factors influence their travel behaviour.

Among those adapting their plans, 16% actively seek destinations with milder temperatures, while 15% avoid destinations prone to extreme heat or check weather forecasts before booking. Looking ahead, two in three Europeans say they would modify their travel plans in response to climate-related disruptions or official safety advisories, highlighting the growing importance of climate resilience in destination choice.

Summer remains the peak season, while value continues to drive travel decisions

Summer continues to dominate Europeans' travel plans, with 86% intending to travel between June and September. Early summer is becoming increasingly attractive, with demand for June trips rising by three percentage points year-on-year.

Despite continued concerns over travel costs, spending intentions remain stable. A budget of €1,500–€2,500 remains the most common spending range (29%), while accommodation, food and beverages, and activities account for the largest share of planned expenditure.

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

Europeans continue to place a high value on travel, even as the global environment becomes more complex. Rather than travelling less, they are travelling more thoughtfully – carefully weighing safety, affordability and climate considerations when deciding where and how to travel.

At the same time, demand remains strong for Europe's most established destinations, while many travellers are also looking for hidden gems and new experiences. This presents an opportunity for destinations to diversify their offer, encourage visitors to explore more widely and year-round, and create seamless, high-quality experiences that respond to changing traveller expectations.

The full report can be downloaded from: <https://etc-corporate.org/reports/monitoring-sentiment-for-intra-european-travel-summer-autumn-2026/>

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Note to editors

The project ***Monitoring Sentiment for Intra-European Travel*** analyses sentiment, motivations, and behaviours related to domestic and intra-European travel across ten major European source markets: Germany, the United Kingdom, France, the Netherlands, Italy, Belgium, Switzerland, Spain, Poland, and Austria. Since September 2020, the research has provided key findings and recommendations for destinations and tourism authorities in regular reports. To access previous editions, please visit this [link](#).

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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