

Long– Haul Travel Barometer 3/2026

Travel horizon:
September– December 2026



Co-funded by
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Methodology

Target

Travel population in Australia, Brazil, Canada, China, Japan, South Korea and the US.

Frequency

Interviews are conducted 3 times per year and provide insights into the travel horizons: January– December, January– April, May– August and September– December.

Method

1,000 online interviews with respondents aged 18–70, representative of the travel population in each market

Data collection period

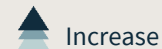
- 7– 19 August 2026
- Travel horizon: September– December 2026

Analysed samples

- Total respondents: 5,799
- Respondents likely to travel long– haul to Europe: 1,944
- Respondents likely to travel long– haul but not to Europe: 710
- Respondents not likely to travel long– haul: 2,914
- Respondents classified as “undecided”: 231
- Where a different base applies, it is stated on the slide.

Significant changes

Statistically significant changes, measured as year– on– year differences in percentage points, are indicated by the following symbols:



Increase



Decrease

Notes on this wave

From autumn 2026, the survey will be conducted with a new panel provider. The questionnaire, the structure and size of the samples and the seven markets are unchanged (except for Australia, see below). Long-term trends have been reviewed across all markets and remain consistent with previous waves.

The Australian sample previously leaned towards higher-income households and is now more evenly distributed across income groups, better reflecting the broader travel population. As interest in European travel rises with income, part of the sentiment movement recorded in Australia is likely to reflect this.

Only 76 Japanese respondents intend to travel to Europe, giving a margin of error of about ± 11 percentage points. Japanese figures are indicative: levels can be read, but changes should be treated with caution.



The survey is meant to gauge travellers’ attitudes and intentions and not to quantify demand levels.

Travel intention and barriers

Travel horizon:
September– December 2026

Sample size
per market 1,000, unless
otherwise specified

01

Travel sentiment highlights

Appetite for long-haul travel has eased this autumn: the share of respondents intending to make such a trip has fallen from 55% to 50%, while the intention to visit Europe has declined in parallel, from 38% to 34%. Both decreases are significant and broadly similar in scale. As a result, Europe's share of overall long-haul travel intention remains unchanged at around two-thirds. The situation, however, varies by market:

Significant falls: China falls 15 points, from 69% to 54%, the largest movement in this wave, but remains the strongest market by a wide margin. What looks like a steep fall is a market settling back to its long-run level, after a surge that peaked in 2024. The decline is not specific to Europe — fewer Chinese travellers are planning to go overseas at all. At the same time, the share who have already booked a flight has risen.

Australia drops 10 points to 27%, although its different sample composition means this result should be interpreted with caution. Japan falls 8 points to 12%, the lowest of the seven, with 78% not planning any long-haul trip. Canada declines by 5 points to 30%.

Broadly unchanged: Brazil is broadly stable at 45% and the United States at 27%, while South Korea rises slightly from 33% to 36% — the only market showing an increase, although not a significant one.



Commitment holds. Cost concerns soften

Although travel intentions to Europe have eased, the share of travellers already holding a flight booking remains unchanged from this time last year at 17%.

Cost remains the single largest obstacle to travel, but its grip is loosening. It is named by 44% of those planning no long-haul trip at all (-5pp) and by 30% of those travelling elsewhere instead of Europe (-12pp).

The second most cited reason is choosing another destination: 18% of those with no long-haul plans prefer to stay closer to home, while 23% of those bypassing Europe are heading to another world region.“

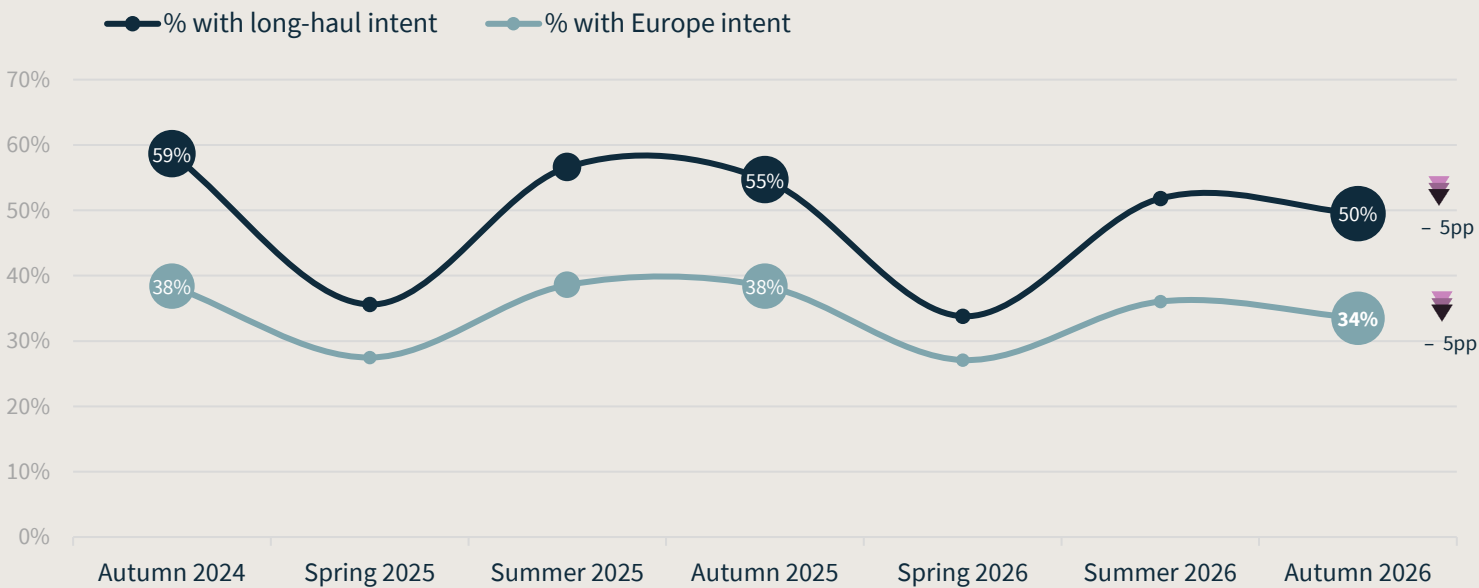
Limited holiday time follows in both lists (14% and 16%) and weighs most heavily on South Korea, while geopolitical concerns and administrative burden are comparatively small but edging up, especially in China.

Long-haul travel intentions continue to cool, but Europe maintains its share

Around two-thirds of those planning to travel overseas intend to visit Europe, similar to last autumn

Evolution of long-haul and Europe travel intent, 2024-2026

% of respondents with positive travel intent across all markets. Like-for-like season comparison

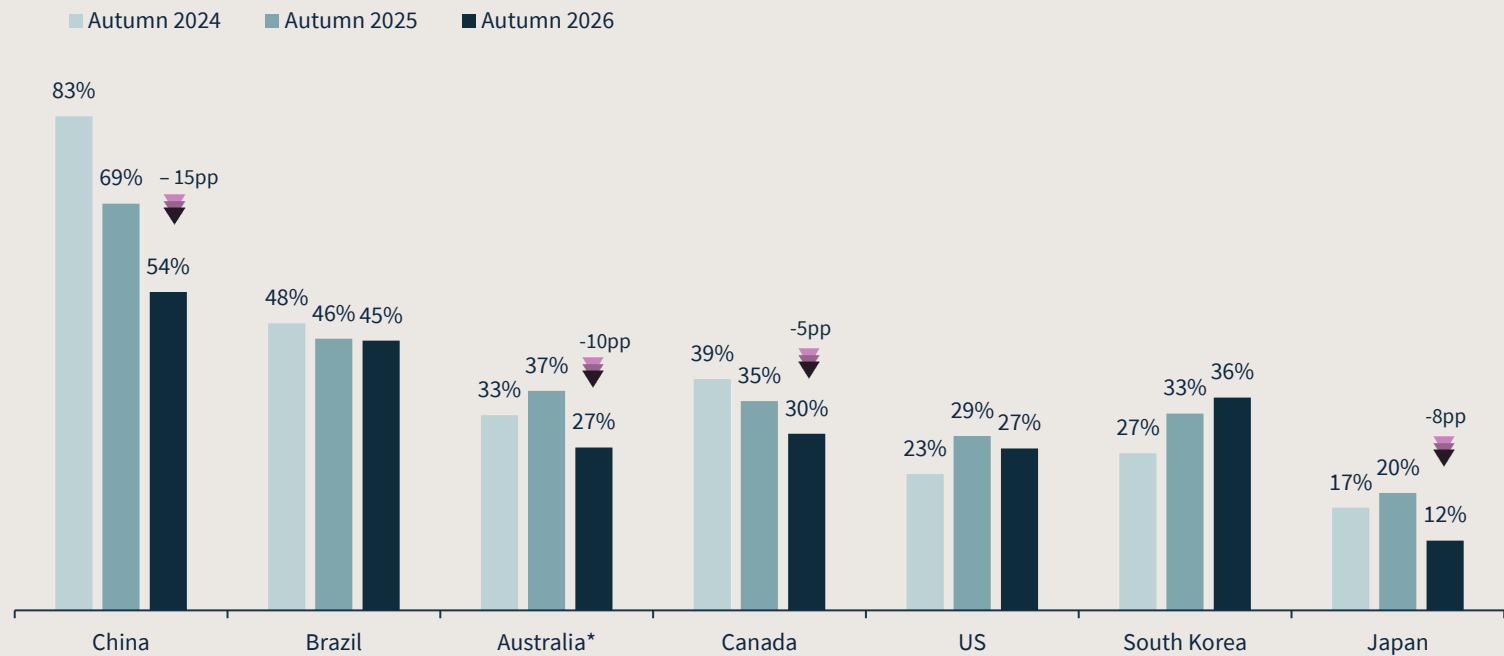


How to read the chart: The dark line shows the share of all respondents with positive long-haul intent, while the light line shows the share with positive intent towards Europe, weighted to the total sample. The gap between the lines indicates long-haul intent toward destinations beyond Europe. Figures are rounded (autumn sentiment in 2025=38.4%, in 2026=33.5%)

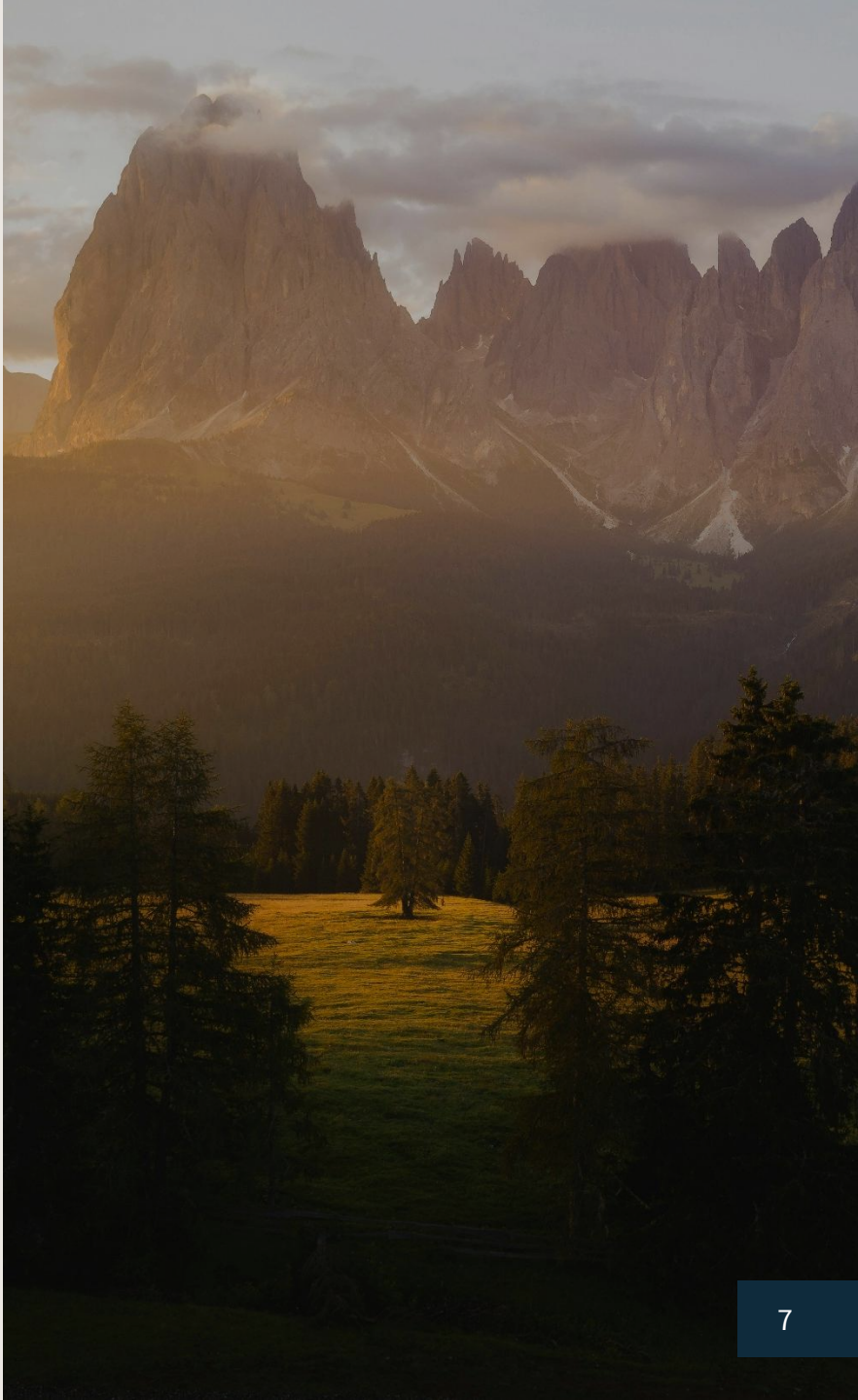
Across three autumns, most markets record softer sentiment

China still records the highest intention to visit Europe, though the share has fallen in successive seasons. South Korea is the only market to have risen in each of the past autumns.

Travel intention to Europe – Autumn horizon (% likely to visit Europe)



Australia: Some of Australia's decline may be linked to the change in sample composition (see methodological note)



China's steep fall returns interest to where it was before the pandemic, while commitment sits well above it

China spent the pandemic years largely closed to overseas travel and reopened with a burst of pent-up demand. Interest in Europe then climbed for three successive years: to 64% in 2022, when intention was running well ahead of the flights available, and on to a record 83% in 2024, as direct routes returned and consumer spending recovered. That burst has now worked its way through.

At 54%, interest in Europe is back within the 50–56% band the market held in every autumn from 2015 to 2019, and the share planning no overseas trip at all has returned to 39%, likewise inside its pre-pandemic range. What looks like a steep fall is a market settling back to its long-run level.

One measure has not gone back. 37% of Chinese respondents have already booked a flight to Europe, against 26% in autumn 2019 and 33% last year. Fewer Chinese travellers are planning to come, but a much higher share of them have already paid for their tickets.

Chinese respondents, autumn waves (September–December travel horizon). Share of all respondents surveyed.

Looking back at trends

2022

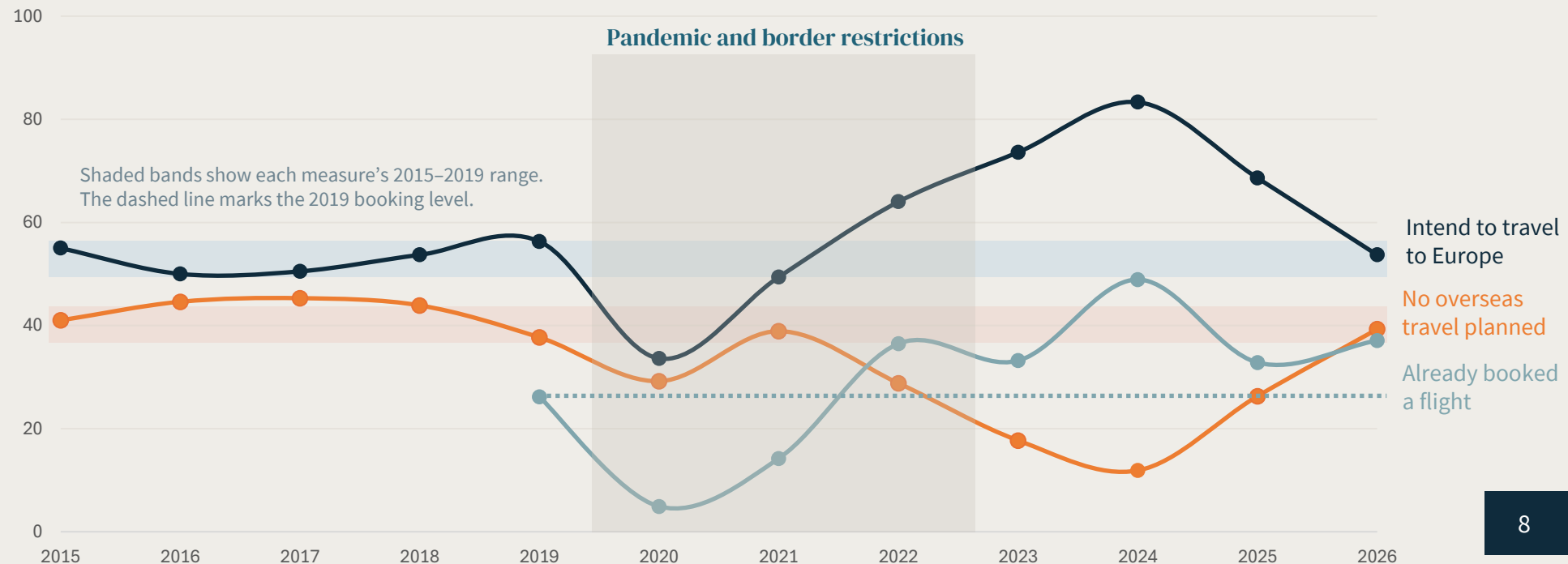
Intention ran ahead of capacity: around 100 flights a day between China and Europe, against more than 2,600 before 2020.¹

2023

Pent-up demand, “revenge spending” and a rebound in Chinese consumer spending.

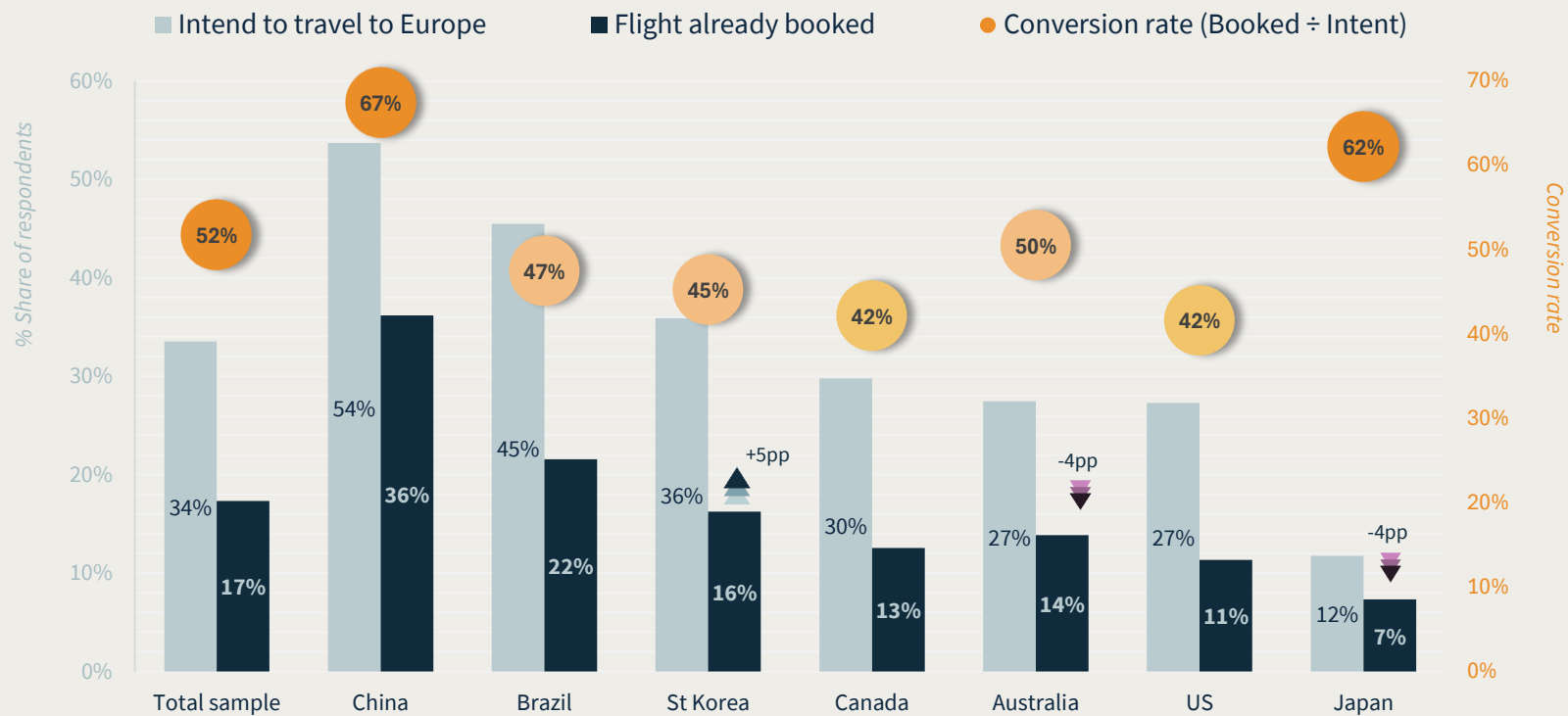
2024

Direct routes between China and Europe are reinstated, reviving interest.



Fewer people plan to travel, but more of those who do have already booked their flights

The share of travellers already holding a flight booking remains unchanged from this time last year at 17%, regardless of the declining sentiment



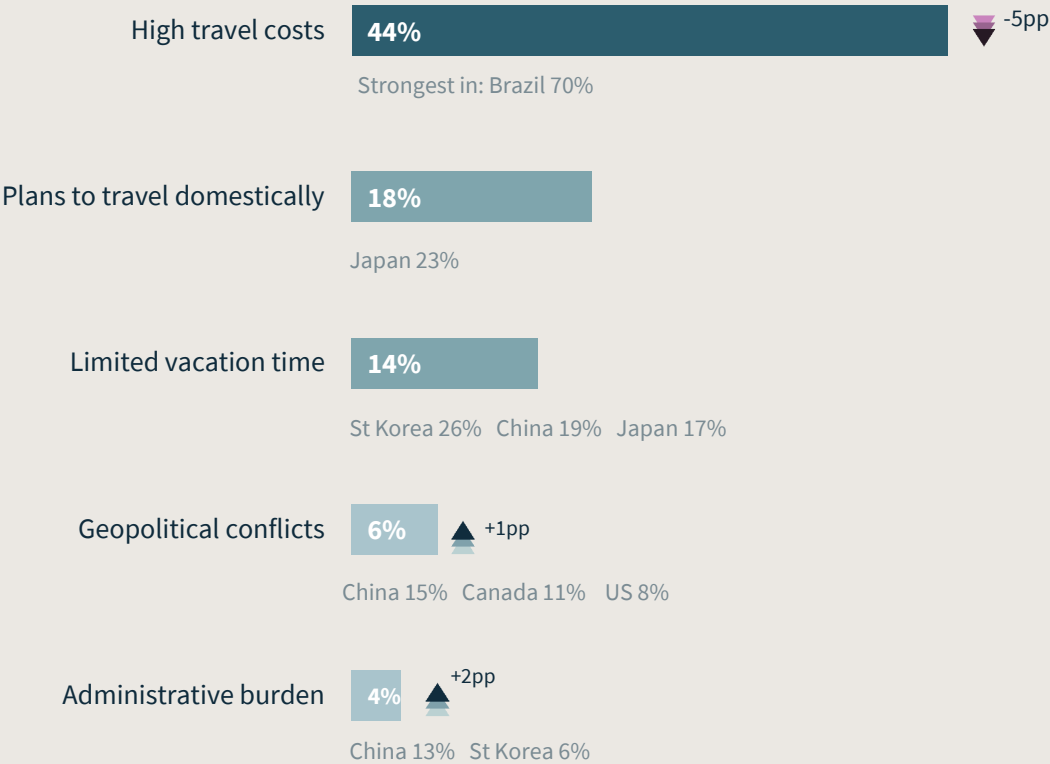
How to read the chart. For each market, the graph shows two figures: the share of respondents who intend to travel to Europe (light blue) and the share who have already booked a flight (dark blue), which is a subset of those who intend to travel. Conversion rate = Booked ÷ Intent

Australia: Some of Australia's decline may be linked to the change in sample composition (see methodological note)

Cost keeps 44% from travelling long-haul and steers 30% away from Europe – but it is easing on both counts

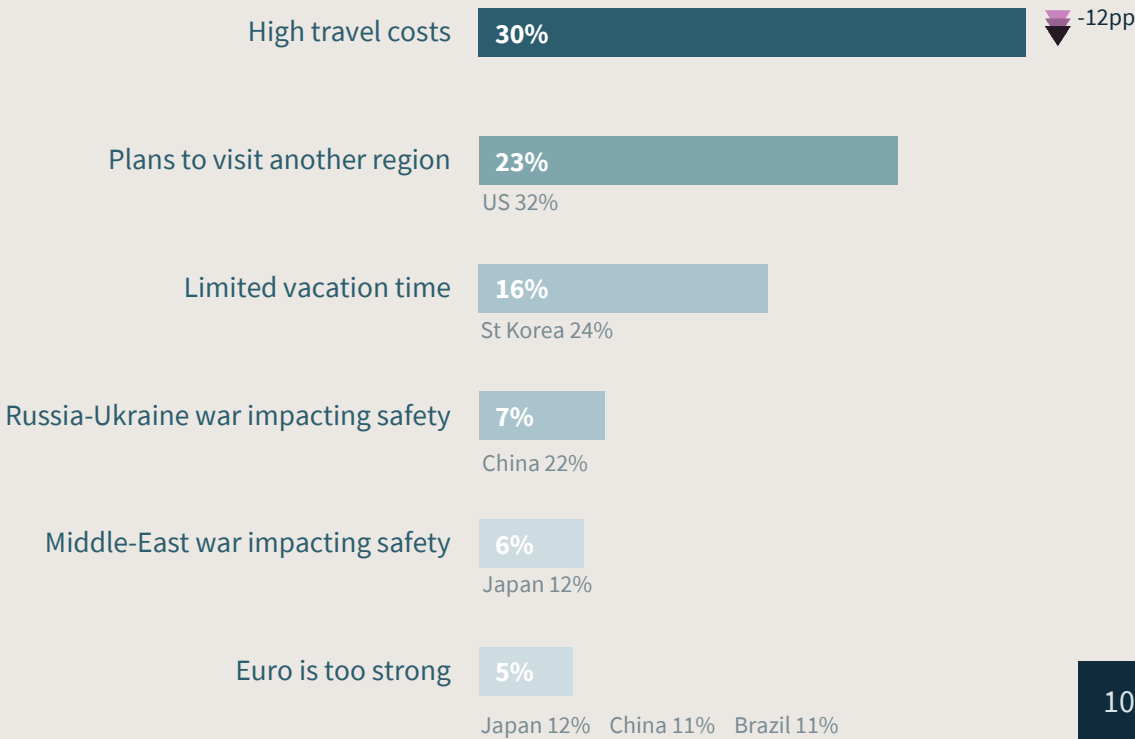
Why they are not travelling long-haul at all

Main reason given by those not planning a long-haul trip (n = 2,914)



Why they are travelling long-haul but not to Europe

Main reason given by those going elsewhere instead (n = 710)



Autumn/Winter Outlook

Travel horizon:
September– December 2026

Sample of respondents likely to travel to Europe (N=1,944).
Australia (226), Brazil (396), Canada (244), China (487), Japan (76), St Korea
(292), US (223). Where a different base applies, it is stated on the slide.

02

Autumn/Winter Outlook Highlights

Europe enters the autumn drawing newcomers and returning visitors in almost equal measure: 53% of those planning a trip will be setting foot on the continent for the first time, and 47% will be returning.

Leisure (73%) is the overwhelming reason for the journey, while the share travelling for business has grown by 3pp on last autumn, to 11%.

Attention is firmly on the south. Two-thirds of travellers name a Southern or Mediterranean country as their desired destination for September to December, confirming that its appeal extends well beyond summer. France and Italy are not only the top choices in Southern Europe but also the most popular destinations overall, followed by Germany, the United Kingdom and Spain.



Few travellers come to Europe for one country alone

66% of travel intenders plan to visit more than one country on the same trip, with the average itinerary covering 2.7 countries. Trips are long enough to allow for it, with the most common length of stay at 7–14 nights (58%) and a further 21% planning more than 14 nights, similar to last autumn.

Air transport leads cross-border travel (low-cost 45%, full-service 44%), with rail passes close behind at 40%. Within a single country, the picture changes: rental cars and rail passes are equally popular, at 32% each.

The main attractions are often free to visit; the spending goes elsewhere

Most of what travellers want to experience costs little or nothing to enjoy: architectural landmarks (36%), urban places (36%), natural attractions (35%) and culinary venues (32%) lead the list, and many of these can be explored without an entrance fee.

Instead, budgets go mainly to food and drink (50%) and accommodation (47%), the most cited spending priorities. The most common daily budget remains €100–€200 per person (37%), but a growing share (28%) now plan to spend €50–€100, up 6pp on last autumn.

53%

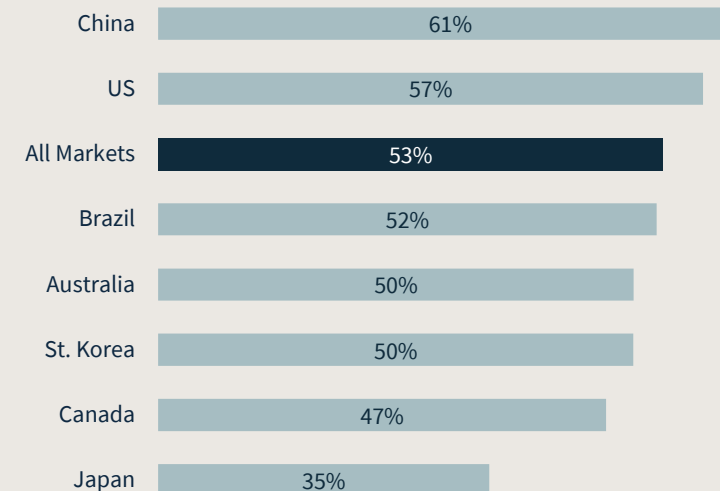
of respondents planning a European trip this autumn have never been to Europe before

First-timers lean towards packages; repeat visitors split evenly between packages and booking services separately



Share of first- time visitors

The remaining shares are repeat visitors

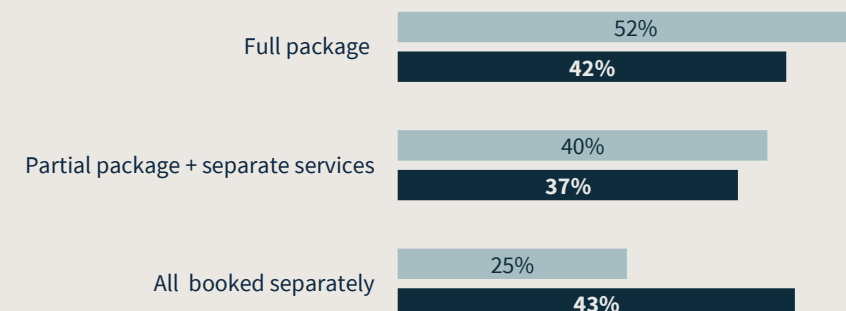


Japanese base under 100 – read as indicative only

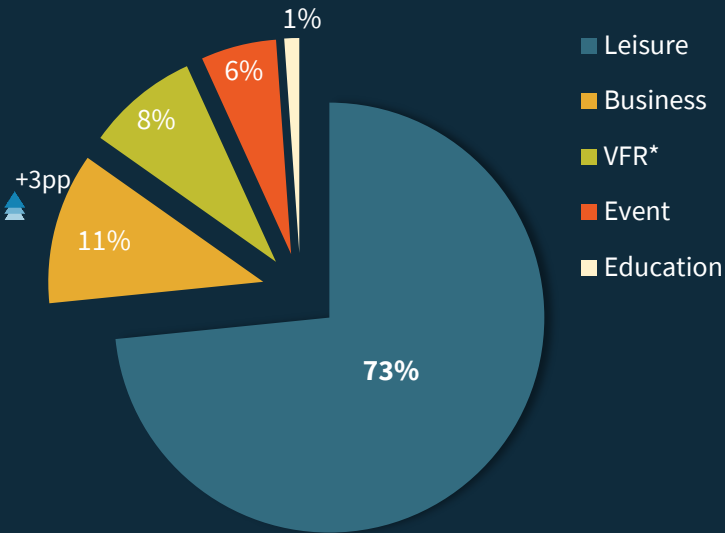
How each group intends to purchase the trip

Multiple answers allowed

■ First-time visitors
■ Repeat visitor



Leisure dominates, while travelling for business grows this autumn

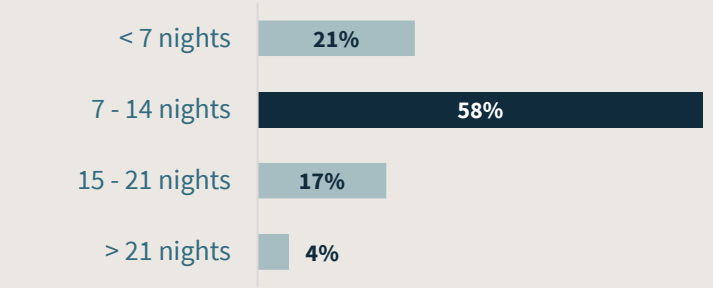


*VFR - Visiting friends and relatives

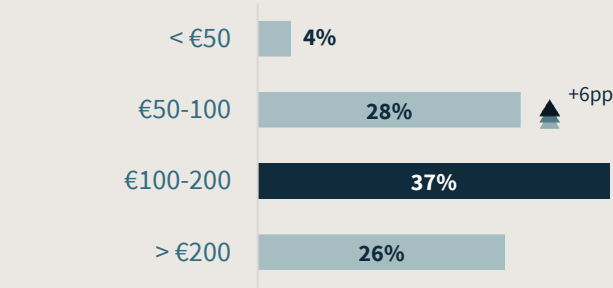


One to two weeks in Europe at €100–200 a day, per person

Intended number of nights



Intended daily spending





Staying the longest does not mean spending the most

Australians stretch their trips the furthest. Japanese and Brazilian travellers spend the most per day.

Brazil outperforms the average on both nights stayed and daily spend

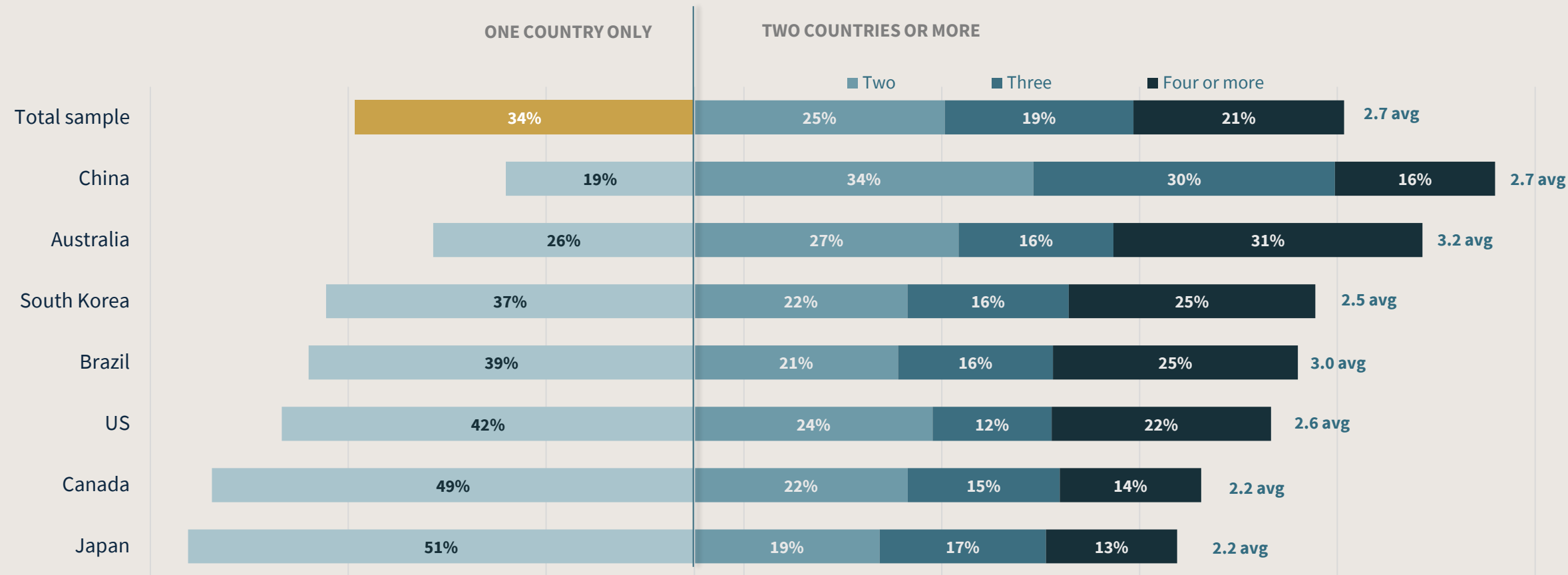
Avg. nights to spend in Europe – 11 nights	Avg. intended daily spend – €150
Australia	
13.3	€144
Brazil	
11.7	€170
China	
11.0	€149
Canada	
10.9	€131
South Korea	
9.9	€147
United States	
9.8	€143
Japan*	
9.2	€170

* Japan n=76 — read as indicative only.

Averages estimated from the midpoints of answer bands, with 25 nights and €250 assumed for the open top bands. Daily spend excludes “don’t know”; bases after exclusion – Australia 214, Brazil 378, China 485, Canada 224, South Korea 292, United States 194, Japan 76 – read as indicative only.

Few travellers come to Europe to visit one country alone

China has the highest share of multi-country trip intenders; Australians visit the most countries. Japan is the only market where half plan to visit a single destination.



Base: 1,889 European intenders naming at least one country.

Getting around Europe

Between countries, the choice is about speed; inside a country, there is no dominant mode of transport. Rail is the only option that sits near the top of both.

Single– country trips

n = 647

10 nights
on average

< 7 nights	32%
7 – 14 nights	53%
15 – 21 nights	10%
>21 nights	5%

Multi– country trips

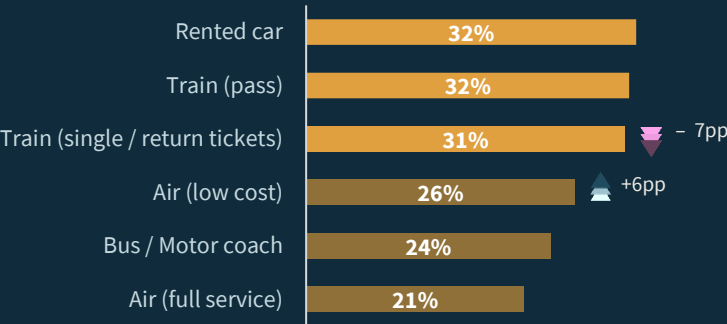
n = 1,248

12 nights
on average

< 7 nights	14%
7 – 14 nights	62%
15 – 21 nights	21%
>21 nights	3%

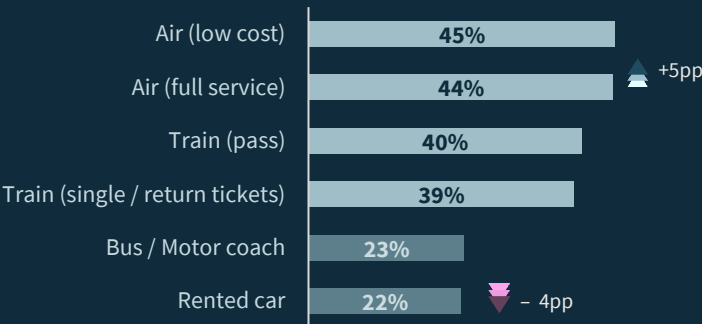
Preferred modes of transportation for single-country trips

n = 581 (single-country trips where the respondent also plans to travel around inside the country)

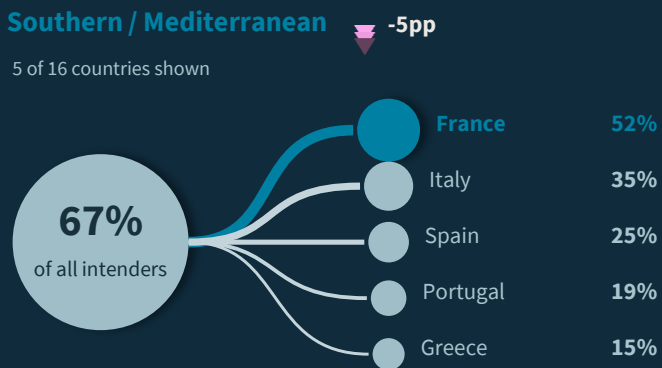


Preferred modes of transportation for cross-country trips

n = 1,248

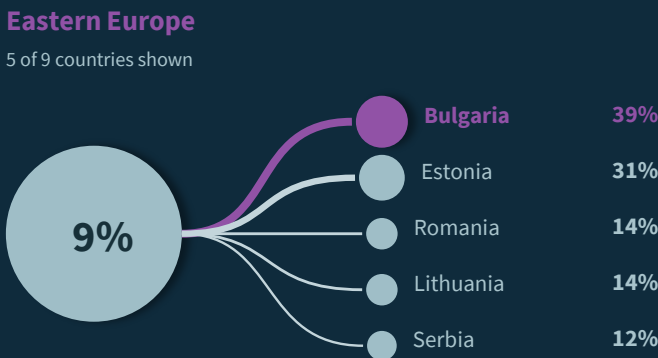
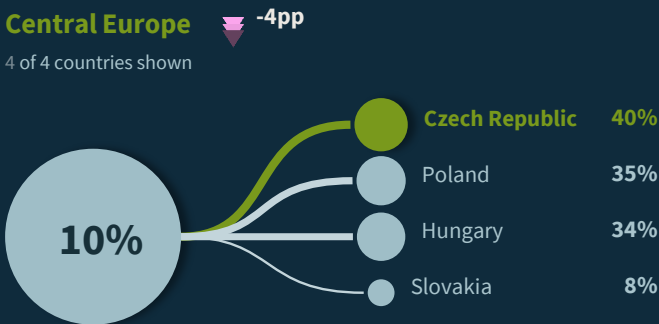
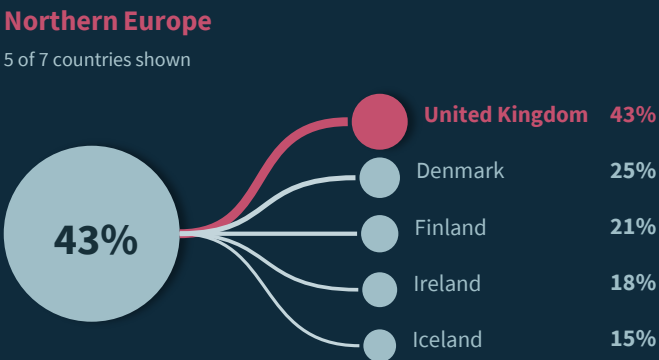
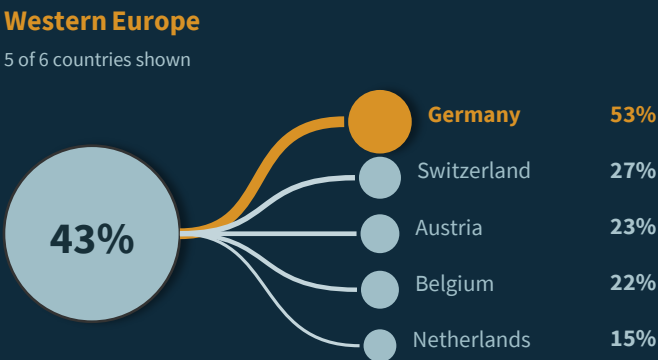


Europe's most sought-after regions – and the destination leading within them



Even after summer, intentions still point south

67% of intenders name a Southern or Mediterranean country for September– December. France leads the region, named by 52%, and Italy following at 35%.

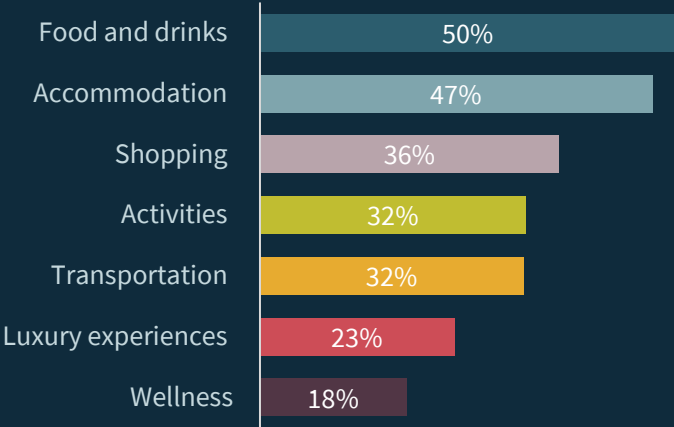


Base: 1,889 European intenders naming at least one country. Regional bases: Southern/Mediterranean 1,312; Northern 842; Western 830; Central 190; Eastern 183. Respondents could name as many countries as they wished. **Country figures are shown as a share of the respective region's total.** Country shares within each region do not sum to 100% because travellers can express interest in multiple countries in the same region.

Food and accommodation lead in five of seven markets

...with shopping next, ahead of activities and transport.

Holiday spending priorities



East Asian travellers prioritise shopping; travellers from the Americas and Australia prioritise activities

Holiday spending priorities by market

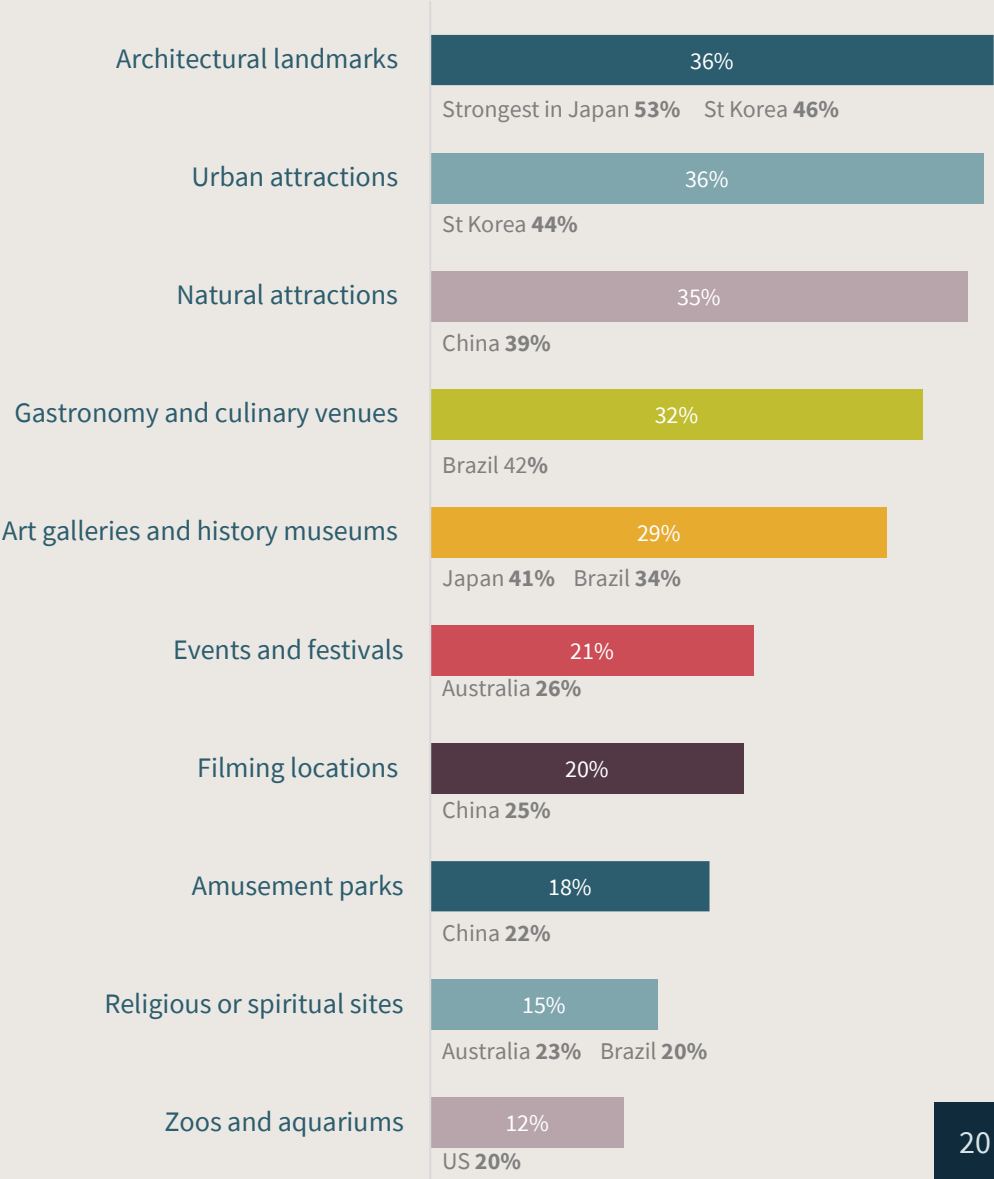
	Food	Stay	Shopping	Activities	Transport	Luxury	Wellness
Australia	49%	49%	27%	39%	35%	23%	18%
Brazil	55%	46%	35%	43%	31%	20%	23%
Canada	50%	48%	25%	32%	32%	17%	17%
China	46%	45%	47%	24%	36%	30%	18%
Japan	59%	61%	40%	17%	30%	14%	10%
St Korea	49%	54%	39%	23%	27%	26%	10%
US	51%	39%	31%	40%	28%	23%	22%



In autumn, the attraction
is the place itself,
not a single site...

...and much of it is free
to enjoy

Preferred type of attractions to visit in autumn



Perception of Europe's brand

Travel horizon:
September– December 2026

Sample of respondents likely to travel to Europe (N=1,944).
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03

Perception of Europe's brand

Across all seven markets, Europe is most strongly associated with its history, culture and heritage, cited by 25% of travellers. Safety and stability follow at 17%, while 13% associate Europe primarily with authentic cultures.

By contrast, just 1% associate Europe first with modernity and innovation, 2% with welcoming people and hospitality, and 9% with value for money.

Sustainability offers a more encouraging signal. At 10%, it is a more prominent association than landscapes, uniqueness, hospitality and innovation, suggesting it is already part of Europe's image rather than a niche attribute.



The more of Europe people know, the less it is considered as one destination

Except for Japanese and Koreans, most markets see Europe as a collection of distinct countries (61%) rather than as a single destination (39%), and this view hardens with experience: 43% of first-time visitors see Europe as one place, falling to 35% among those who have been before.

The same pattern appears across markets, and it follows how people actually travel. Japan, the only market in which most respondents plan to visit a single country, is also the most likely to describe Europe as a single destination. China and Australia, where travellers cross the most borders, are the least likely.

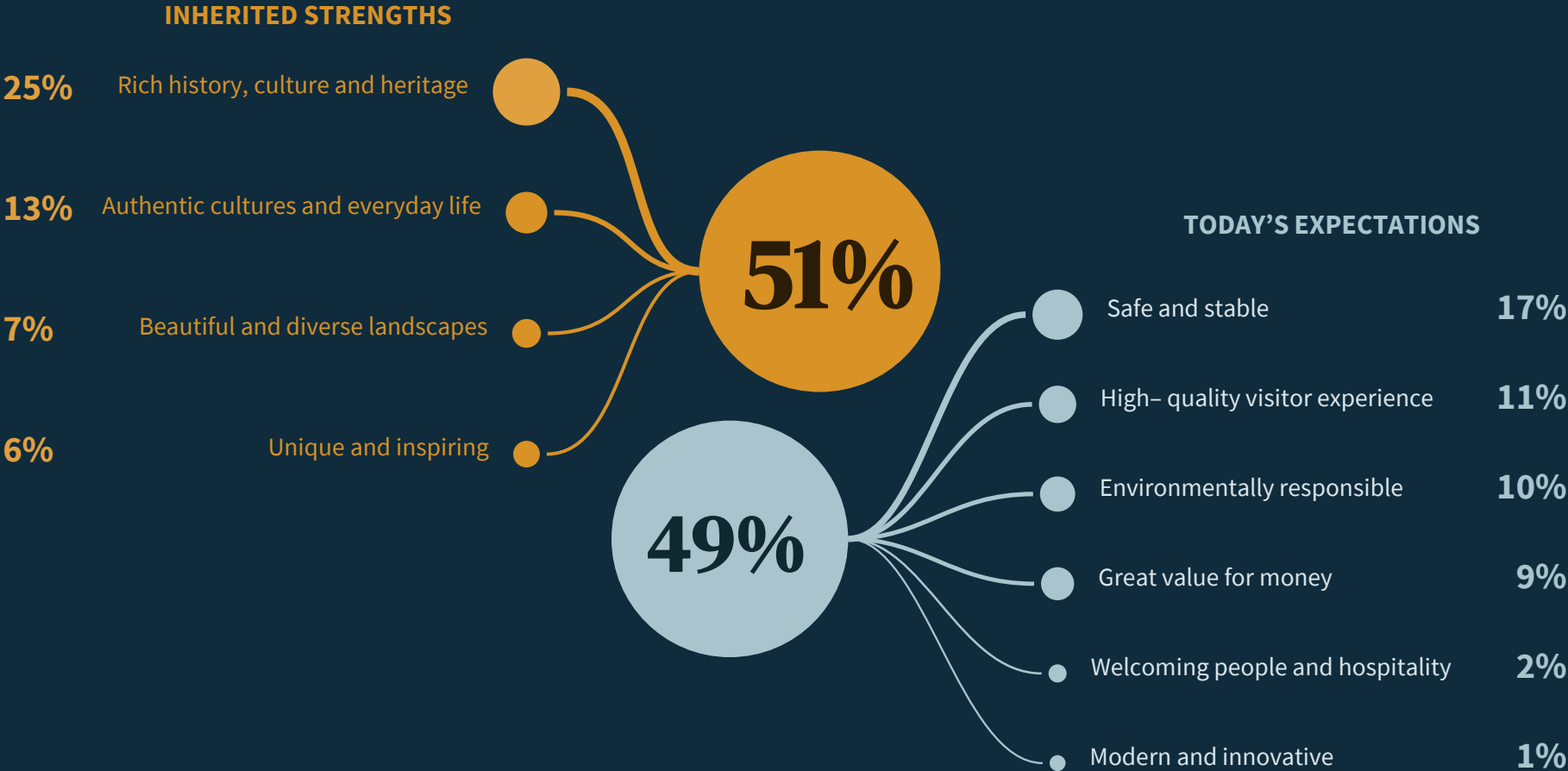
What makes it feel like one place?

Among those who do see Europe as a single destination, the reasons are practical rather than emotional. Around half relate to ease of movement – air connections (19%), rail (17%) and roads (15%). Common rules account for a further 30% through a single visa (17%) and the shared currency (13%), while shared history accounts for 20%.

For travellers, Europe becomes one destination when it is easy to cross, not when it feels culturally uniform. Connectivity is thus a brand asset, not only a logistical detail

What makes Europe appealing: what it has always been, or how it performs today?

Which of the following best captures what makes Europe most appealing to you as a travel destination?



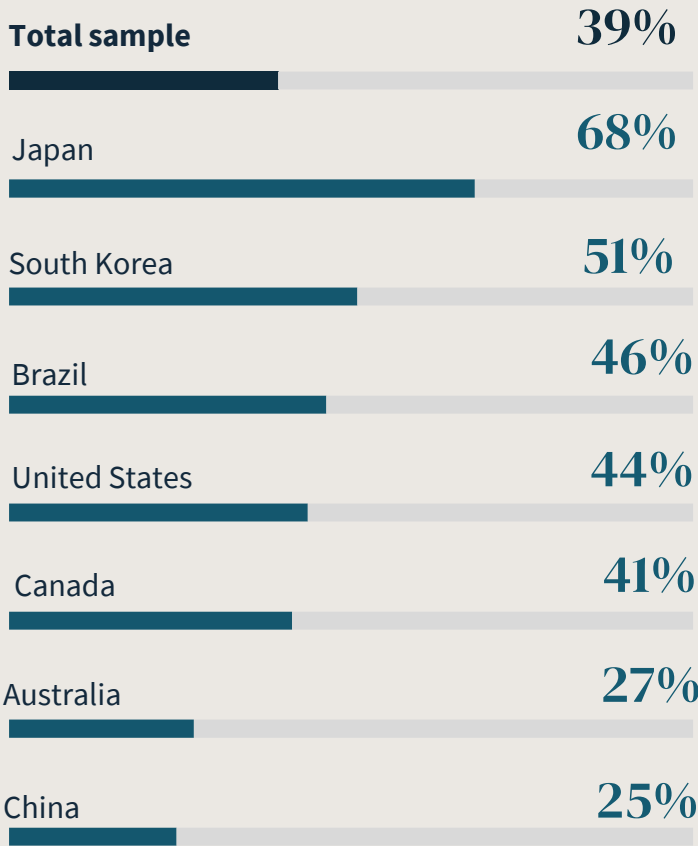
Some figures may not sum due to rounding

Four in ten
see Europe as one
destination – one
connected experience

The majority (61%) see a
collection of distinct countries
offering unique experiences

SEEING EUROPE AS ONE DESTINATION

The remaining shares see Europe as a collection
of distinct countries.

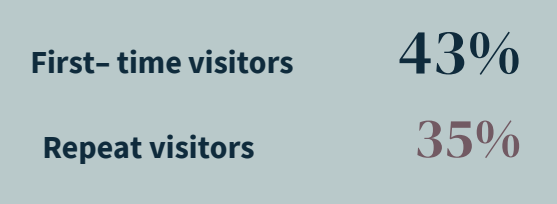


Japanese base under 100 – read as indicative only

...and it looks most like one
place to those who have not
yet visited it

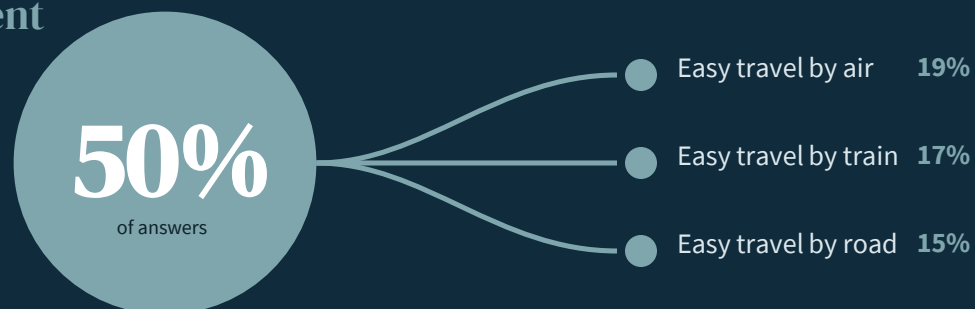
SEEING EUROPE AS ONE DESTINATION

By travel experience



Elements contributing to Europe's image as a unified destination

Ease of movement



Policies



Shared culture



Connectivity is a brand asset, not a logistics detail. It produces the perception of a collective Europe

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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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