Press Release

Europeans Seek City Breaks and Culture & Heritage Trips, as Three in Four Plan to Travel this Autumn and Winter

- 76% of Europeans plan to take an overnight trip between October 2026 and March 2027, up 3% compared to last year.
- Despite lower travel intention for October-November (-11%), Europeans show a growing interest (+8%) in travelling during February-March 2027.
- 40% of Europeans planning to travel use AI tools in the inspiration, planning, or booking stage. This increases to 56% for 18-24 year-olds.

Brussels, **9 November 2026:** Three quarters of Europeans (76%) intend to travel between October 2026 and March 2027, up 3% compared to the same period last year, according to the latest "Monitoring Sentiment for Intra-European Travel" report (Wave 26) by the European Travel Commission (ETC). **Poland** records the strongest intention (87%), representing a 5% increase, followed by **Spain** (82%), and **Germany** and **the Netherlands**, which both stand at 79%.

Travel appetite extends across age groups. Travellers aged **35-44** lead with 79%, ahead of those aged 45-54 and 55+ (both 76%). Travellers aged **18-24** record the largest year-on-year increase in travel intentions, surging 10%. **Southern Europe** remains by far the most popular destination region (53%), followed by **Western Europe** (23%), which is seeing a 5% increase in interest.

Christmas leads demand as more Europeans plan several trips

December is the most popular month to travel during this period (23%), driven by the Christmas season. During December, visiting friends and family is a more prominent reason for travelling at 32%, compared to 18% overall. Autumn holidays in **October and November** are less popular in 2026 than in 2025, but intentions rise again in the new year, as Europeans show a growing interest in **March** (+6%) getaways.

56% of those planning to travel are now looking at taking two or more trips by March, with the share of travellers planning just one trip decreasing by 7%. This reinforces the strong sentiment to travel amongst Europeans and provides a positive outlook for winter destinations.

Less-visited destinations gain ground, while safety, stable weather, and costs remain central to destination appeal

Though established destinations with well-known attractions still draw in 47% of travellers, interest **in less-known locations** is catching up. 44% of surveyed European favour locations that are less popular among tourists, up by 4% year-on-year, while a further 10% prefer remote or off-the-beaten-track destinations for their next trip.

Safety is the leading destination-selection criterion (20%), followed by pleasant and stable seasonal weather (15%) and attractive deals (14%). Looking at European's main concerns in relation to travel, financial pressures lead (37%), followed by geopolitical instability (23%).

Travellers choose city and heritage trips, with digital tools central to discovery

As winter approaches, **city breaks** (19%) and **culture and heritage** trips (18%) again rise to the fore of Europeans' travel intentions. **Sun and beach** holidays maintain their appeal as winter sun destinations, favoured by 18% of intended travellers.

Most Europeans are now using digital tools, including AI platforms, to find information, compare prices and build itineraries. Younger Europeans are at the forefront of **AI-assisted travel inspiration, planning and booking**. Among travellers aged 18 – 34, 56% used generative AI or AI trip-planning platforms when preparing their trips, against 40% of the overall sample, and just 26% of those aged over 55. Online search engines (59%) and travel websites (57%) remain the most widely used digital tools among European travellers.

Budgets edge up, but costs will influence final booking decisions

Trip lengths remain steady, with 43% planning **four to six nights**, and 32% seven to twelve nights. However, planned budgets are edging upwards, as 49% of travellers allocate **€1,000-€2,500 per person**. Slightly higher budgets alongside stable trip lengths may reflect an allowance for rising costs rather than longer holidays. 55% of travellers have yet to book their trip, meaning that many plans may remain provisional. Final spending and trip arrangements may therefore remain sensitive to costs as plans take shape.

Responding to the report, **Eduardo Santander, Chief Executive Officer of the European Travel Commission**, said:

"The findings of this report underline the ambition of the Commission's new Sustainable Tourism Strategy: travel remains at the heart of the European way of life, but traveller behaviour and industry dynamics are constantly shaped by external factors. It is particularly encouraging to see an increase in intention during February and March, typically quieter periods of the year, as well as a growing interest in off-the-beaten track destinations. These two trends combined could be leveraged to reduce tourism congestion and create new opportunities for local businesses in established and developing destinations alike. At the same time, concerns around cost and safety are clearly shaping travellers' choices, highlighting the importance of offering reliable experiences and services for all budgets."

Discover more at: https://etc-corporate.org/reports/monitoring-sentiment-for-intra-european-travel-autumn-winter-2026-2027/

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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 europeantravelcommission.com.

The Wave 26 findings are based on fieldwork carried out from 15 to 30 September 2026 among a total sample of 6,000 respondents across ten European source markets, including 4,555 respondents most likely to travel in the next six months.

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