Press Release

EU Sustainable Tourism Strategy adopted against background of increasing resilience and reducing seasonality

- 3% increase in international tourist arrivals to Europe; geopolitical and climate challenges ahead: over the summer, arrivals grew compared with the same period in 2025, with 80% of European destinations recording an increase in foreign visits.
- Smaller and value-for-money destinations lead on growth, though starting from a lower base, with Malta, Slovakia and Ireland at the forefront.
- Higher energy prices, Middle East airspace restrictions and tighter household budgets are expected to make travellers more price-sensitive this winter and into 2027.

Brussels, 5 November 2026: European tourism demand held firm over the summer despite ongoing global uncertainty, according to the European Travel Commission's (ETC) latest European Tourism: Trends & Prospects quarterly report (Q3/2026). International tourist arrivals increased by 3% compared with the same period in 2025, and the vast majority of destinations (80%) recorded more foreign visits than last year.

The outlook, however, is increasingly shaped by forces beyond the sector's control. Geopolitical and climate instability is pushing up prices and weakening travel confidence, while higher energy costs are set to squeeze household budgets and change how people travel in the months ahead.

It is against this backdrop that the European Commission published its Sustainable Tourism Strategy on 4 November 2026, demonstrating a commitment to support the competitiveness, sustainability and resilience of the travel industry. ETC warmly welcomes this Strategy as a positive first step towards increased multi-level governance, and deeper cooperation between the European institutions and tourism stakeholders. The results European Tourism: Trends & Prospects quarterly report (Q3/2026) indicate the centrality of tourism to the European economy and way of life, and demonstrate that Europe maintains its position as the world's leading tourism destination.

Northern and value-for-money destinations lead growth

Northern Europe led regional growth over the summer, followed by Central and Eastern Europe, which continued to attract travellers looking for value for money.

Nights in Northern Europe climbed 7.2%, ahead of a 6.2% rise in arrivals. Greater affordability encouraged more cross-border travel, helping to lift visitor numbers in Sweden.

Malta (+18%), Slovakia (+15%), Ireland (+13%) and Poland (+11%) recorded double-digit increases in arrivals, as did Romania and Montenegro (both +10%). Growth was more moderate in Europe's largest destinations, with arrivals up 5% in Spain, 3% in France and 1% in Italy.

Geopolitical and climate risks weigh on the outlook

Europe's tourism outlook remains exposed to geopolitical developments. Risks to Middle East airspace threaten connectivity between Europe and Asia, increasing the likelihood of longer flight times, higher operating costs and further disruption to international air travel. A prolonged disruption to oil and gas supplies could keep energy prices high, raising travel costs and adding pressure on household incomes, tourism businesses and economic growth.

Some destinations are already feeling the effects. In Cyprus, arrivals fell 7% as flight disruptions linked to the Middle East conflict and safety concerns following a drone incident weighed on demand, despite a strong start to the year.

Wildfires, particularly in Spain and France, caused some disruption to tourism at regional level, though not enough to affect national figures. In Spain, arrivals rose 5.4% and nights 1.2% in the year to August. Timely communication and visitor guidance from national tourism authorities helped limit disruption in affected areas. In France, arrivals and nights were both up 2.7% in July. With the fires peaking in August, however, their full impact may not yet be apparent.

Rising costs set to make travellers more price-conscious

Inbound travel spending has risen in most destinations this year, partly reflecting higher prices. Hungary saw the widest gap, with spending up 20.1% against a 2.5% increase in arrivals, helped by a stronger forint. Spending also outpaced arrivals in Greece, Belgium, Spain, France, Germany, Portugal and Italy.

Pressure on household finances is expected to build. Higher gas prices will limit travel budgets just as operating costs and airfares rise, while eurozone wage growth is expected to fall slightly below inflation this winter. With savings already falling, the effect on consumer spending is likely to become more visible over Q4 2026 and Q1 2027. Destinations may see greater price sensitivity and later bookings this winter and into 2027, with those offering good value and easy access better placed to maintain demand.

Rising costs are also the industry's main worry, cited by 50% of surveyed tourism professionals. Financial concerns overall eased slightly to 83%, down from 87% in the Q2 survey, but a continued rise in fuel prices into Q4 could push airfares higher at a time when household budgets are already stretched.

A longer tourism season

Foreign visits to Europe are becoming more evenly spread across the year, a shift that high summer prices and congestion could accelerate. The gap between the share of visits in Q1, the quietest quarter, and Q3, the peak travel period, is expected to narrow from an average of 22.5% in 2010-15 to 20.4% in 2027. The shift towards year-round tourism is most visible in Central and Eastern Europe, where the gap is set to narrow to 13.6% from 19.0%, as the region continues to attract travellers seeking value-for-money throughout the year

Mediterranean destinations are recording the strongest growth in winter demand, albeit from a lower base than other regions, as interest in winter-sun trips continues to rise. Northern European destinations, meanwhile, could

see stronger demand in summer, as hotter weather elsewhere boosts their appeal as a cooler alternative in peak season.

This gradual shift towards year-round travel is in line with the Sustainable Tourism Strategy's target of balancing tourist flows across the year, indicating the positive potential of the Commission's long-term goal. A more even spread of visitors over the year and across regions could help reduce seasonal pressure on popular destinations and open new opportunities for less-visited ones, which is a central theme of the Strategy.

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

"European tourism has continued to show resilience this summer, despite a more volatile global environment. While rising costs mean travellers will be more selective in where and how they spend on travel, it is particularly encouraging to see smaller destinations growing and visits spreading more evenly across the year. A longer tourism season can deliver more balanced benefits across Europe, supporting local economies and communities beyond the summer peak."

The full report can be downloaded from: https://etc-corporate.org/reports/european-tourism-trends-prospects-q3-2026/

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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.

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