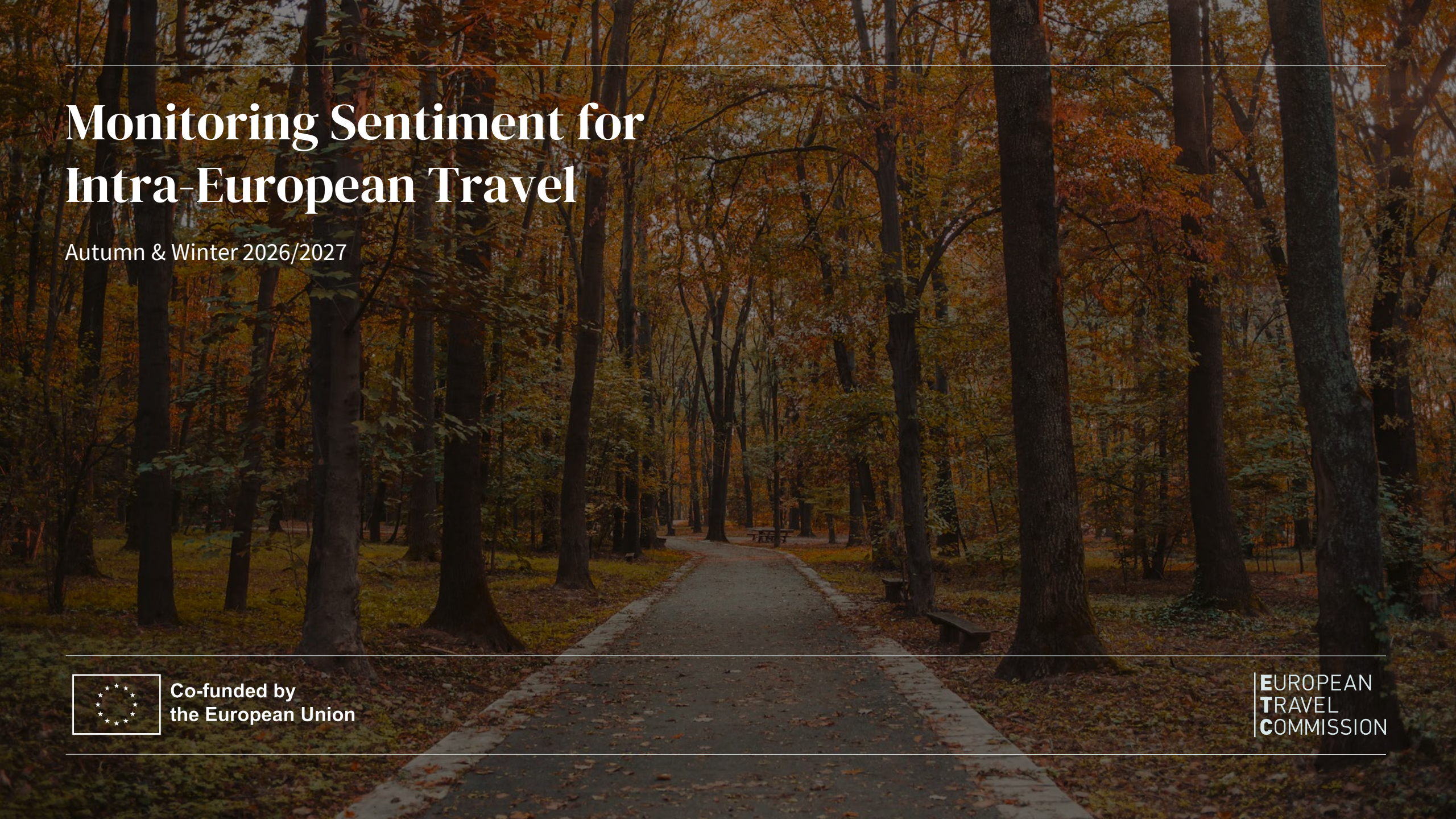
Monitoring Sentiment for Intra-European Travel

Autumn & Winter 2026/2027



Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

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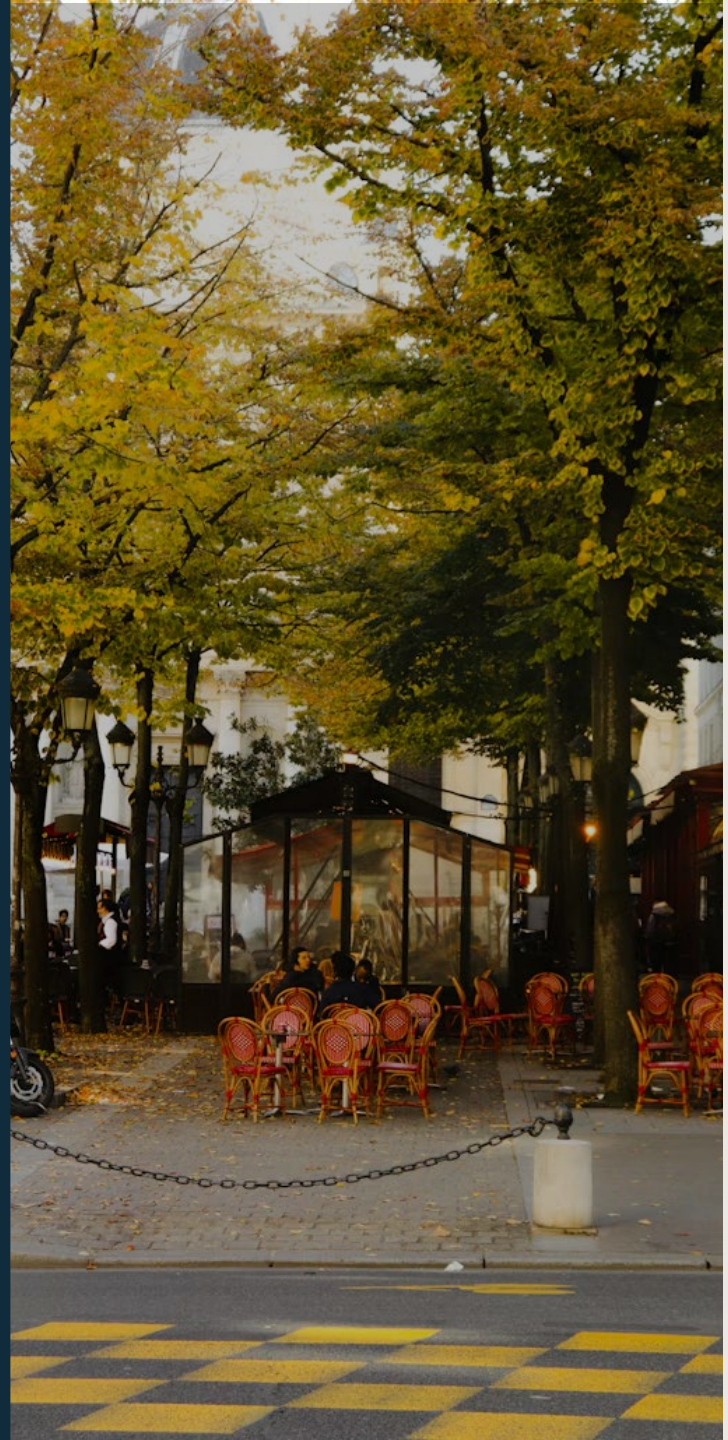
WAVE 26

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

It is the 26th update since the series began in September 2020.

The findings are based on data collected in September 2026 from respondents in 10 key European markets, focusing on their travel plans for the period October 2026 to March 2027.

EUROPEAN TRAVEL COMMISSION



TRAVEL INTENTIONS

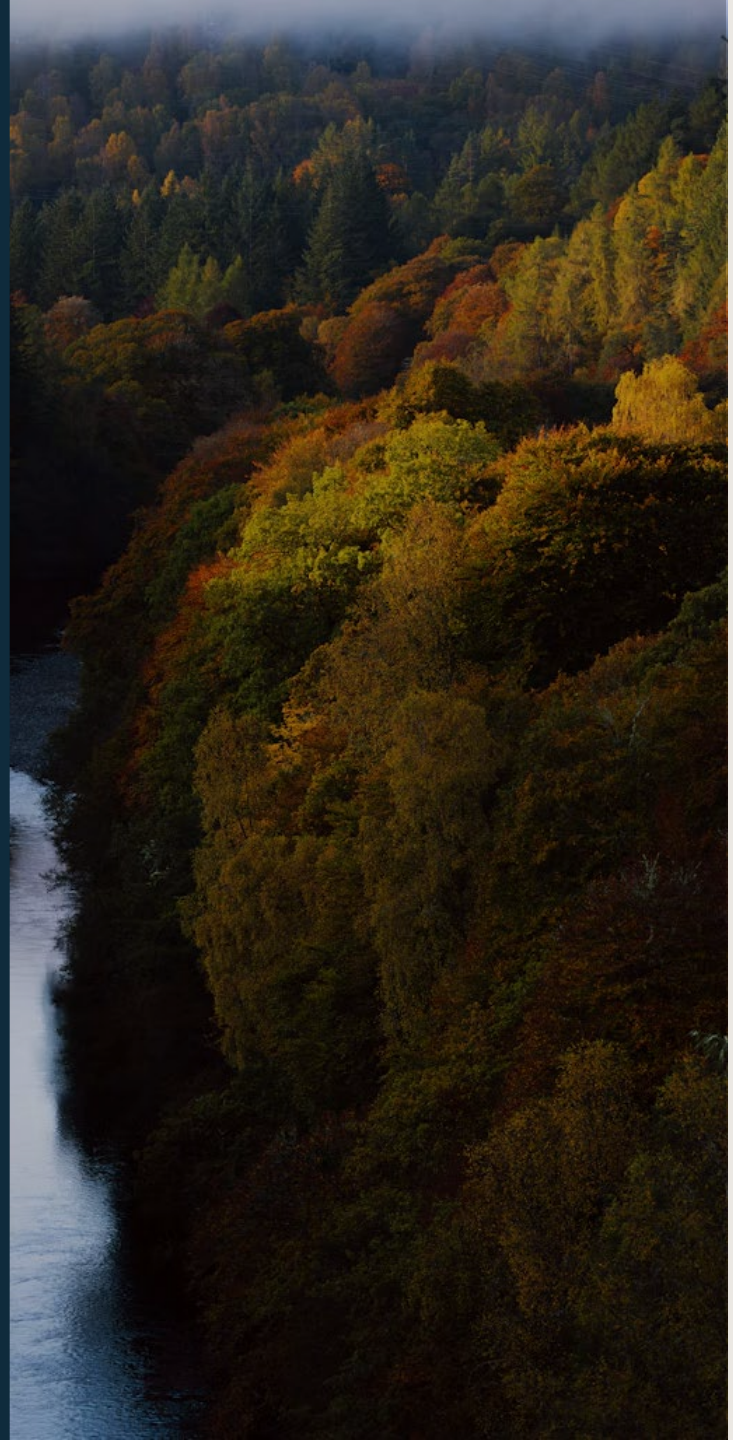
- Over **three in four Europeans** (76%) plan to travel this autumn and winter, up 3% on last year.
- **Travel intentions peak around Christmas** (23%) and rise again in March (+6%). Visiting friends and relatives accounts for 32% of December trips, compared with an average of 10% during other travel months.
- **Intra-European travel maintains its strong appeal**, with 64% planning a trip within Europe, stable across recent waves.
- **Southern and Mediterranean Europe remains the preferred region** for over half of travellers (53%), while 23% plan to visit Western European destinations (+5%).
- **City Breaks** (19%) and **Culture & Heritage** trips (18%) retake the lead as winter approaches, while Sun & Beach holidays maintain their appeal (18%).
- **Less popular and off-the-beaten-track destinations gain traction**, attracting 54% of travellers (+4%).
- **Staying in one destination remains the preferred trip format** (60%), particularly for Sun & Beach (69%), Skiing (67%) and City Break (66%) trips.

Comparisons vs. a year ago (September 2025)

Research highlights

WAVE 26

EUROPEAN
TRAVEL
COMMISSION



TRIP PLANNING

- **56% of Europeans plan multiple trips** this autumn and winter, up 6%.
- Intended **trip length holds steady**, with 43% planning stays of 4–6 nights, while 49% budget €1,001–€2,500.
- **55% of Europeans plan to travel by air**, 25% by car and a notable 14% by train.
- **Search engines** (59%) and **travel websites** (57%) lead Europeans' digital travel journey across inspiration, planning and booking stages, while **AI tools and platforms are being used by 40%,** and to a considerably higher extent among younger generations.

TRAVEL CONCERNS AND CONSIDERATIONS

- **Safety** (20%), **pleasant weather** (15%) and **attractive prices** (14%) continue to shape Europeans' destination choices.
- **Financial pressures top travellers' concerns** (37%), followed by **geopolitical instability** (23%), extreme weather events (10%) and destination overcrowding (9%).

Comparisons vs. a year ago (September 2025)



WAVE 26

Recommendations for destinations

- **Disperse visitor flows through local connections:** Europeans' preference for single-destination stays (60%) and growing interest in less popular destinations (54%) create an opportunity to disperse visitor flows from a convenient base. Destinations can **connect nearby towns and rural attractions through themed day trips, reliable public transport and bookable excursions**. This approach can spread tourism flows and spending more widely, while helping to ease overcrowding and tourism pressures at popular sites.
- **Strengthen affordability and value:** As financial pressures remain travellers' leading concern (37%), destinations can **strengthen value through traveller cards offering discounts** on transport and attractions, low-cost activities and tours, and affordable winter packages. These initiatives can help visitors manage their budgets while positioning the destination as an affordable travel choice.
- **Build seasonal appeal around local culture:** The seasonal appeal of City Breaks (19%) and Culture & Heritage trips (18%) supports **distinctive autumn and winter experiences built around local culture**. Destinations can combine local markets, food experiences, heritage sites and themed walks into coherent seasonal programmes. Christmas and March travel peaks offer clear opportunities for targeted campaigns and bookable packages.
- **Improve visibility in AI-driven travel planning:** With 56% of travellers aged 18–34 and 50% of those aged 35-44 using AI for trip planning, destinations should make their tourism offer easier to discover through AI tools and platforms by **investing in Generative Engine Optimisation (GEO)**. This coordinated approach to digital promotion aims to improve destinations' visibility in AI-generated travel recommendations. Practical actions include developing well-structured and AI-appropriate website content, answering travellers' specific planning questions and maintaining consistent information across platforms.



WAVE 26

Recommendations for businesses

- **Use gastronomy to enrich authentic experiences:** Spending on food and drinks is a top priority among travellers interested in local cuisine, culture and heritage, creating an opportunity to use gastronomy as a gateway to authentic experiences. Restaurants, accommodation providers and tour operators can develop and further promote **tasting menus, guided market tours, cooking workshops and producer visits, pairing food with storytelling and cultural activities** to differentiate their offer and increase visitor spending.
- **Invite residents and guests to celebrate together:** Visiting friends and relatives accounts for 32% of December trips, and businesses can invite residents and guests to celebrate together, **turning gatherings into demand for dining, attractions and shared activities**. Festive group menus, multigenerational experiences and family activities can encourage joint bookings, supported by messaging that emphasises quality time together and the ease of organising holiday gatherings.
- **Simplify booking and target later bookers:** With 55% of travellers yet to book, businesses should make it easier to move from interest to reservation. **Transparent total prices, straightforward cancellation terms, a simple booking process and early-booking discounts** can address practical barriers to purchase and improve conversion. Furthermore, **targeted offers should also focus on travellers aged 55+**, who are more likely to book later and favour stays of seven nights or longer.
- **Build confidence through flexibility and support:** Travellers' preference for stable weather conditions, alongside concerns about geopolitical disruptions, highlights the value of **flexible booking, cancellation policies, rebooking options and responsive customer support**. Businesses can prepare indoor alternatives, adaptable activity schedules and clear procedures for weather or transport disruption. Communicating these arrangements clearly before booking and ahead of arrival can help travellers manage uncertainty and feel more confident about their plans.



WAVE 26

Reading the data

Data collection periods

Wave 26	15-30 September 2026
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

Analysed samples

- Total respondents: 6,000
- Respondents most likely to travel in the next six months: 4,555
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 5,402

Significant changes

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

Increase

Decrease

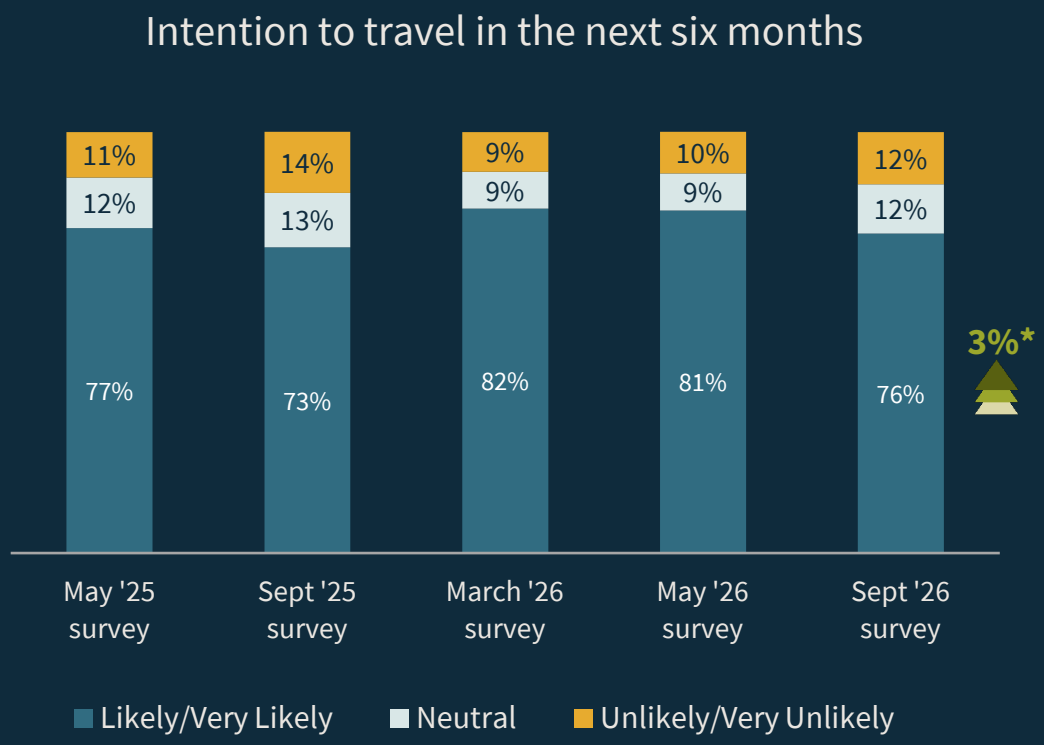
All data and insights refer to domestic and intra-European travel unless otherwise stated.



Travel intentions

01

Europeans' travel sentiment is strong for this autumn and winter, up 3%



Top markets most likely to travel in the next six months

POLAND
87% 5%*

SPAIN
82%

NETHERLANDS
79%

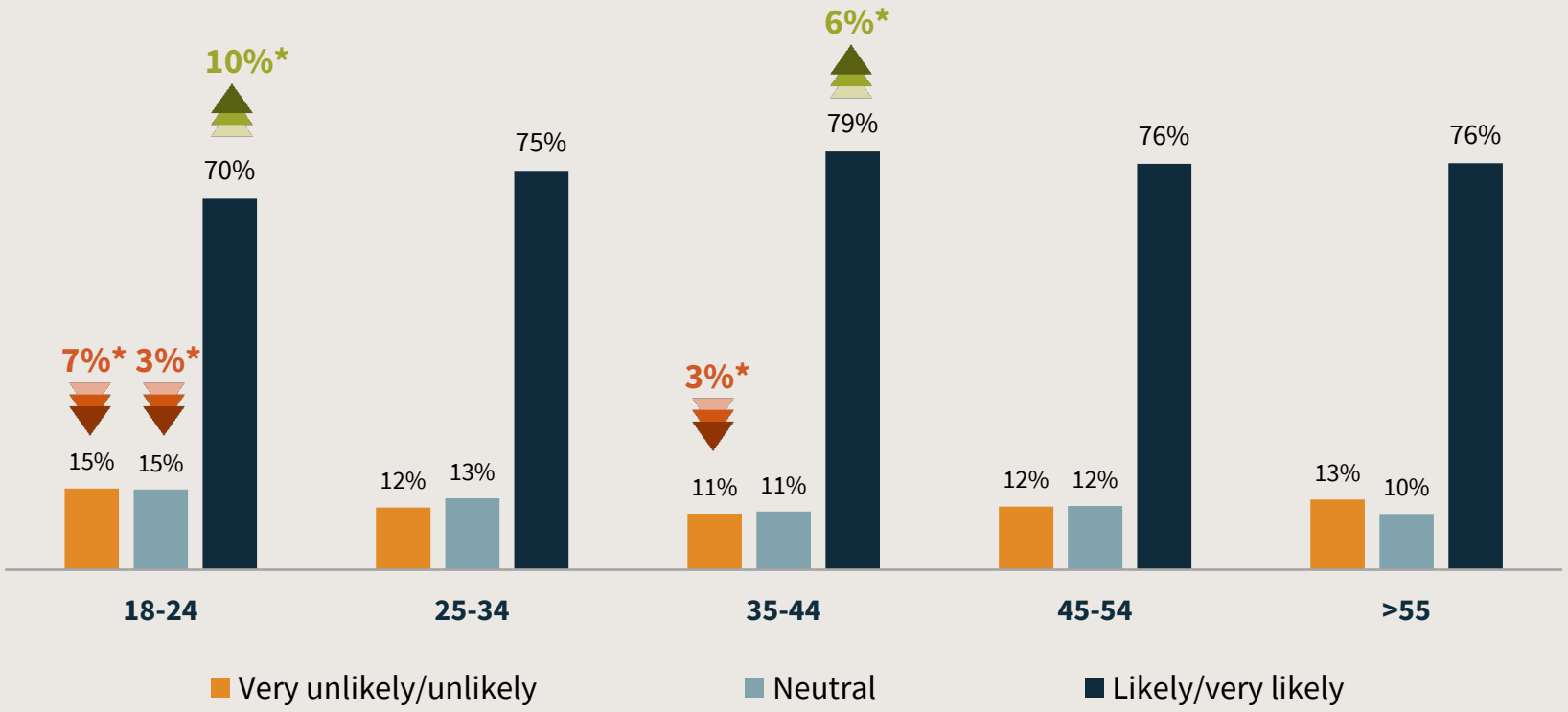
GERMANY
79%

Q4. 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 (September 2025)
No. of respondents: 6,000

Europeans aged 35–44 lead travel intentions (+6%), while Gen Z records a 10% surge

Intention to travel in the next six months by age group



* Statistically significant difference vs a year ago (September 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: 6,000

Key barriers to travel

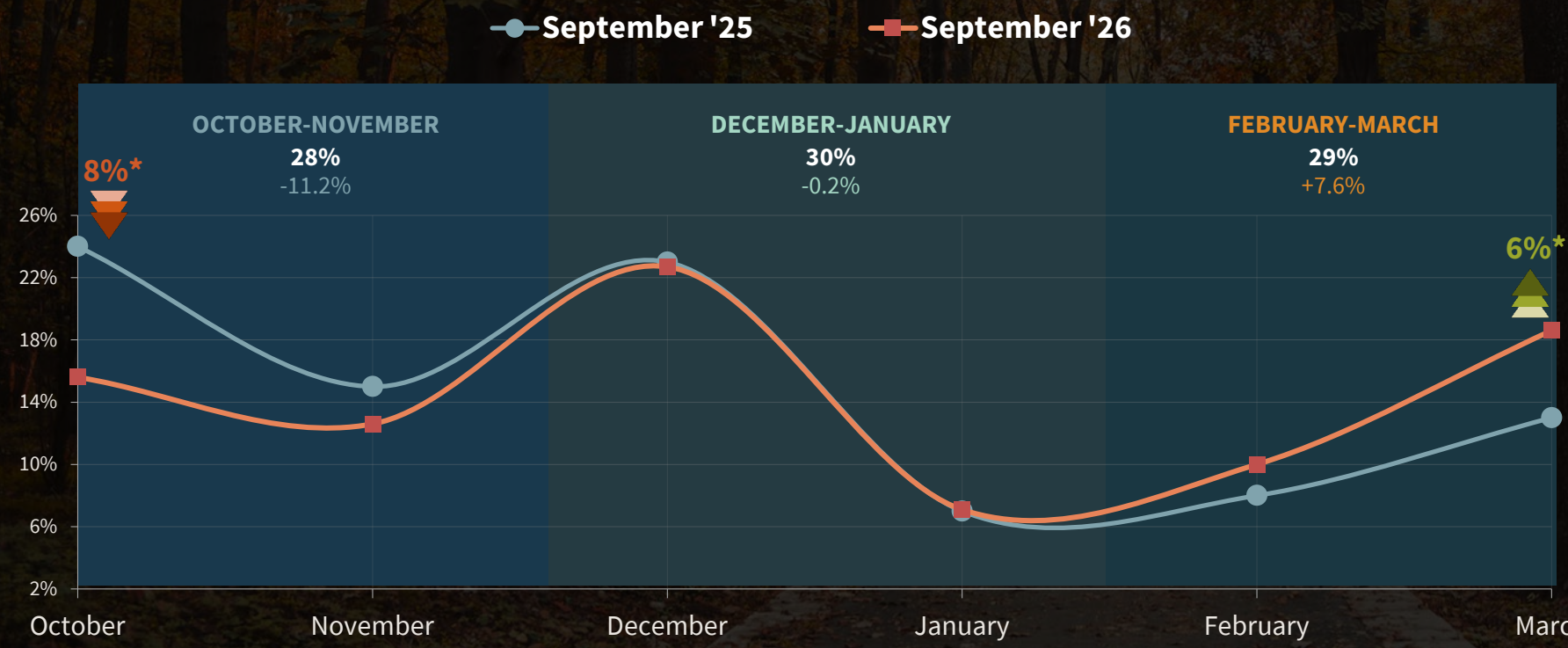


Q5. You mentioned that you will not travel in the next 6 months. What is the main reason behind this decision?

No. of respondents: 743

Europeans' travel intentions are modest in autumn, but peak around Christmas and rise again in March (+6%)

When will Europeans travel next?



Visiting friends and relatives accounts for 32% of planned December trips, compared with an average of 10% among other months.

Q9. 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 September 2026. Planning certainty naturally decreases for months further from the survey date; absolute monthly distributions should therefore be interpreted with caution

No. of respondents: 4,555

How do Europeans' trip characteristics vary by travel period?

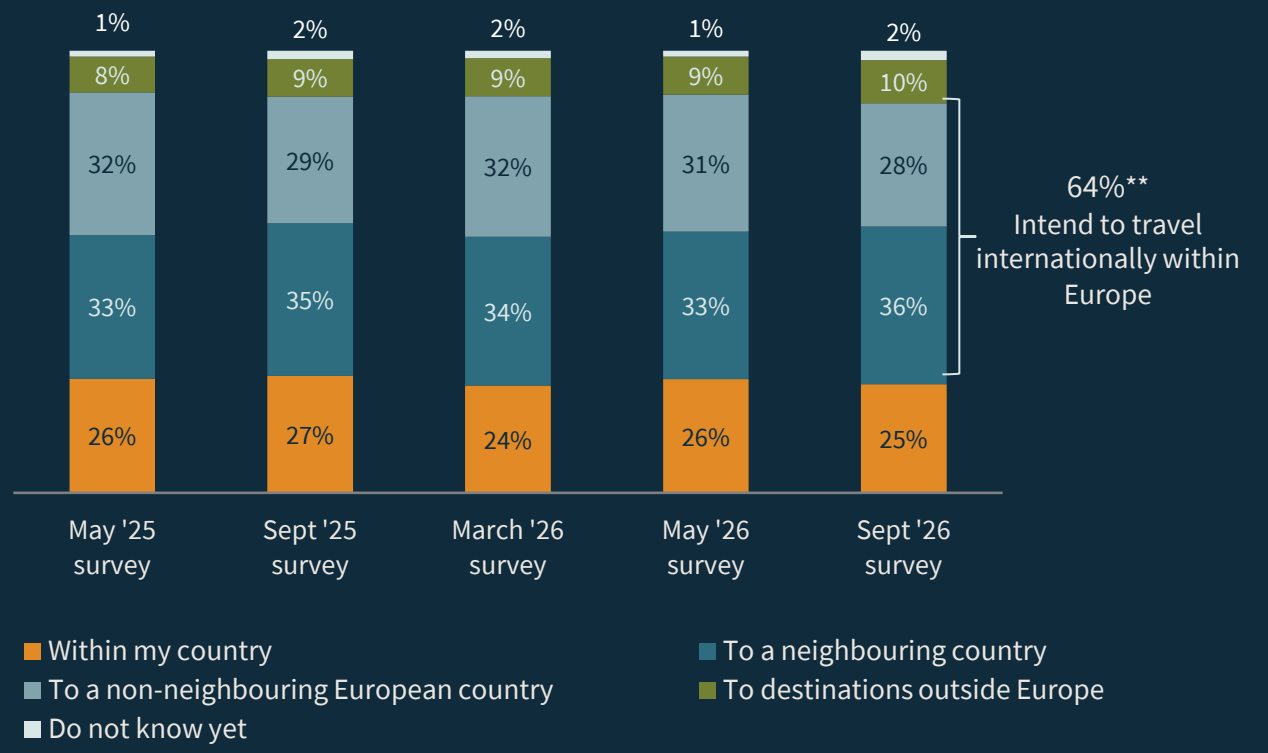
Short city-breaks are favoured for October-November, while February-March sees higher budgets and culture-led trips

	OCTOBER-NOVEMBER travellers	DECEMBER-JANUARY travellers	FEBRUARY-MARCH travellers
TOP-3 TYPES OF PREFERRED TRIPS	**23%** City Break **20%** Sun & Beach **14%** Nature & Outdoors	**19%** City Break **16%** Sun & Beach **14%** Nature & Outdoors	**21%** Culture & Heritage **18%** Sun & Beach **14%** Nature & Outdoors
MOST COMMON LENGTH OF STAY	**39%** 4-6 nights **24%** Up to 3 nights	**43%** 4-6 nights **26%** 7-9 nights	**46%** 4-6 nights **25%** 7-9 nights
MOST COMMON BUDGET (per person)	**30%** 501-1000 € **21%** 1001-1500 €	**25%** 501-1000 € **25%** 1001-1500 €	**28%** 501-1000 € **22%** 1501-2000 €

No. of respondents: October-November 1,448 | December-January 1,648 | February-March 1,600

A stable 64% of Europeans favour intra-European trips

Where will Europeans travel within the next six months?



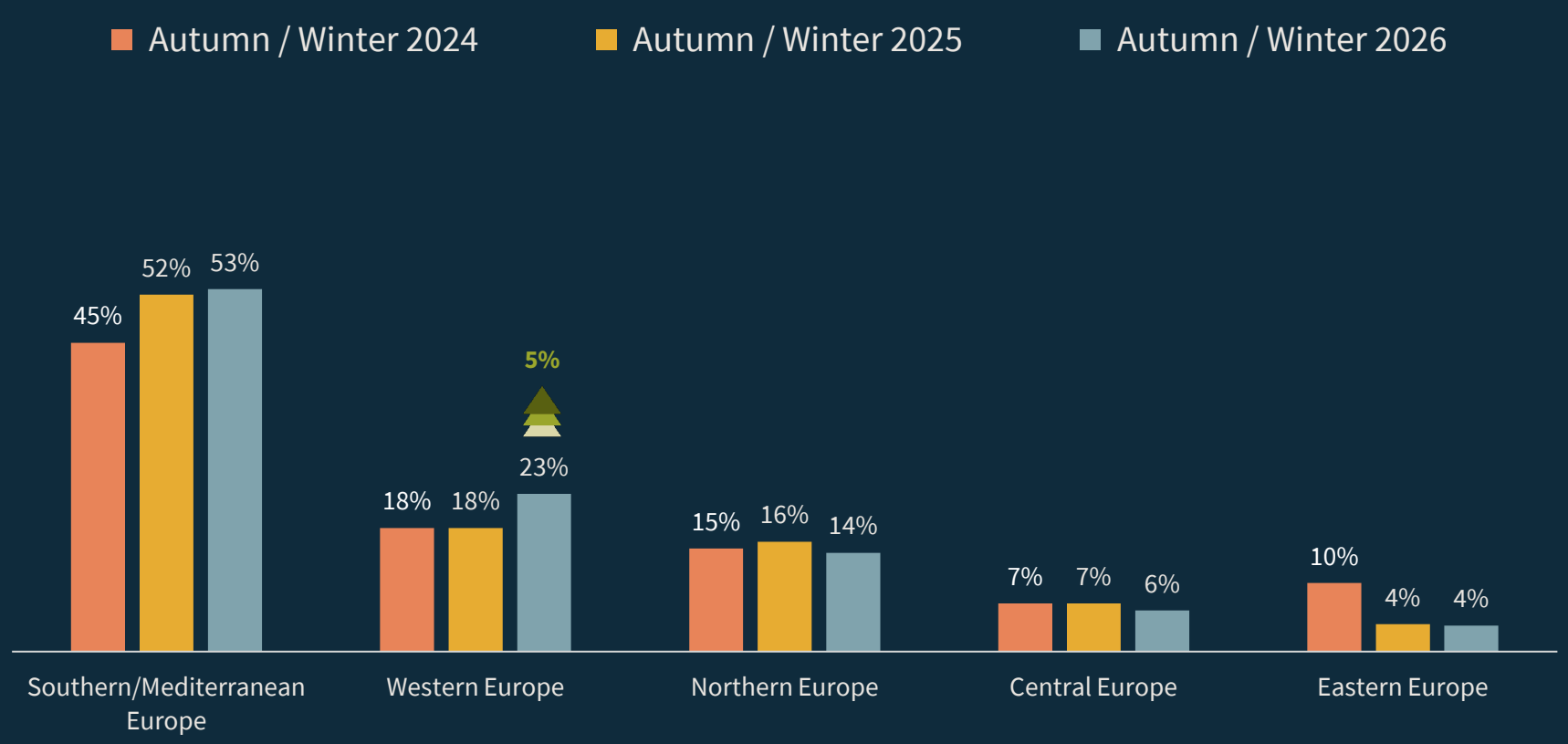
Q10. Where do you plan to travel in the next six months?

**Minor discrepancies in totals are the result of rounding

No. of respondents: 4,555



Southern and Mediterranean Europe attracts over half of travellers, while sentiment for Western Europe increases by 5%



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 autumn / winter 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

Q12. To which country(ies) do you plan to travel next?

No. of respondents: 5,402

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	▲ **25%** Sun & Beach **18%** Culture & Heritage **16%** City Break	▲ **23%** City Break ▲ **16%** Nature & Outdoors **16%** Culture & Heritage	▲ **22%** Culture & Heritage **18%** City Break **16%** Nature & Outdoors	▲ **25%** City Break ▲ **22%** Culture & Heritage **13%** Nature & Outdoors	**18%** City Break ▲ **17%** Nature & Outdoors **15%** Culture & Heritage
MOST COMMON LENGTH OF STAY	**42%** 4-6 nights **27%** 7-9 nights	**43%** 4-6 nights ▲ **24%** up to 3 nights	**44%** 4-6 nights **27%** 7-9 nights	▲ **47%** 4-6 nights **22%** up to 3 nights	**42%** 4-6 nights ▲ **29%** 7-9 nights
MOST COMMON BUDGET (per person)	**27%** 501-1000 € **24%** 1001-1500 €	▲ **30%** 501-1000 € **21%** 1001-1500 €	**23%** 1001-1500 € **22%** 501-1000 €	▲ **33%** 501-1000 € **19%** 1001-1500 €	**25%** 501-1000 € **22%** 1501-2000 €

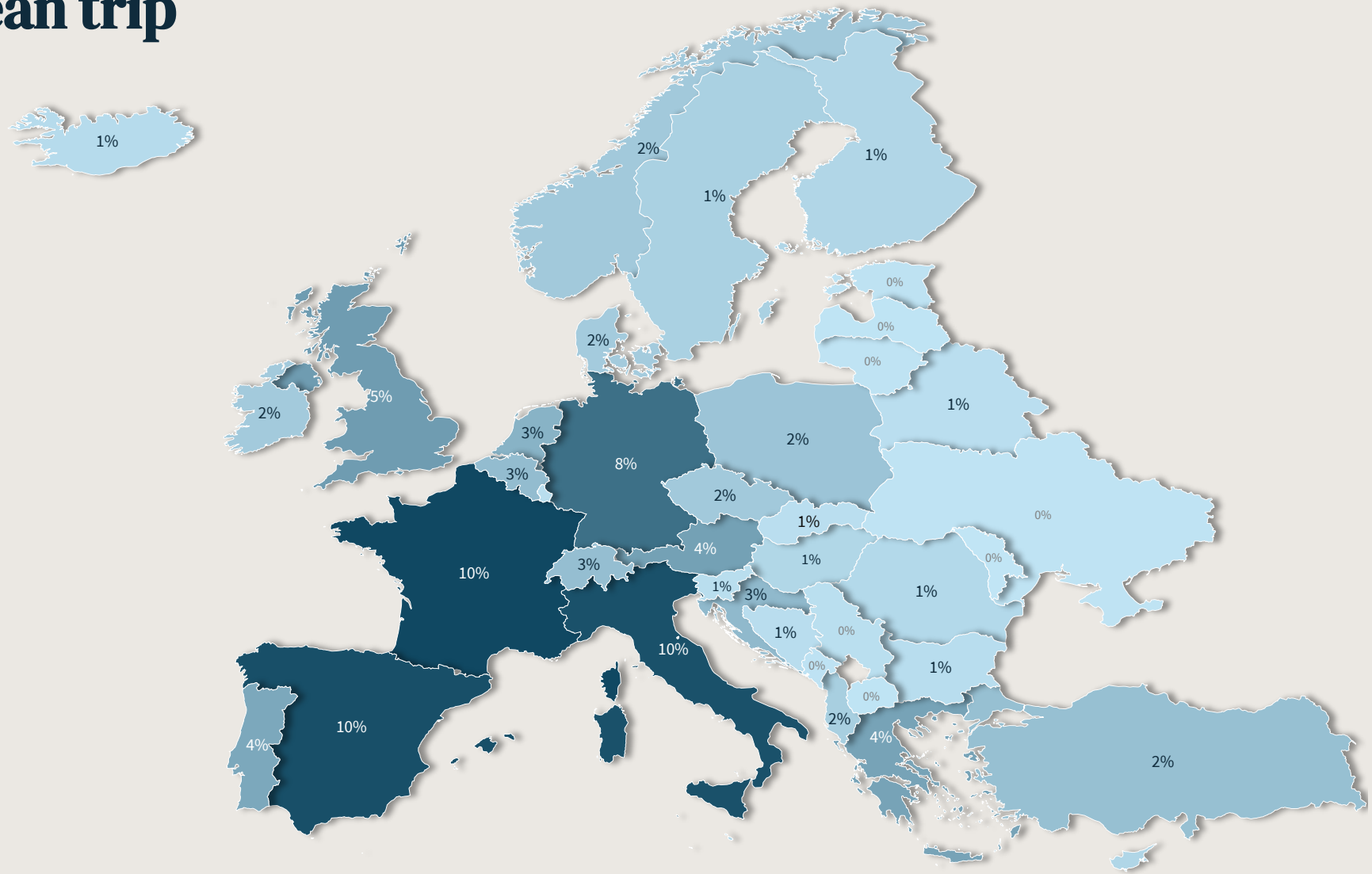
▲ Definitions of the regions can be seen in the Methodology
% indicates a statistically significant increase vs total travellers

No. of travellers per region: Southern Europe 2,863 | Western Europe 1,242 | Northern Europe 756 | Central Europe 324 | Eastern Europe 216
NOTE: Results on Eastern Europe should be treated with caution, due to small sample base

Most popular countries for the next intra-European trip

TOP 10 COUNTRIES

France	**10%**
Spain	**10%**
Italy	**10%**
Germany	**8%**
UK	**5%**
Austria	**4%**
Greece	**4%**
Portugal	**4%**
Netherlands	**3%**
Croatia	**3%**

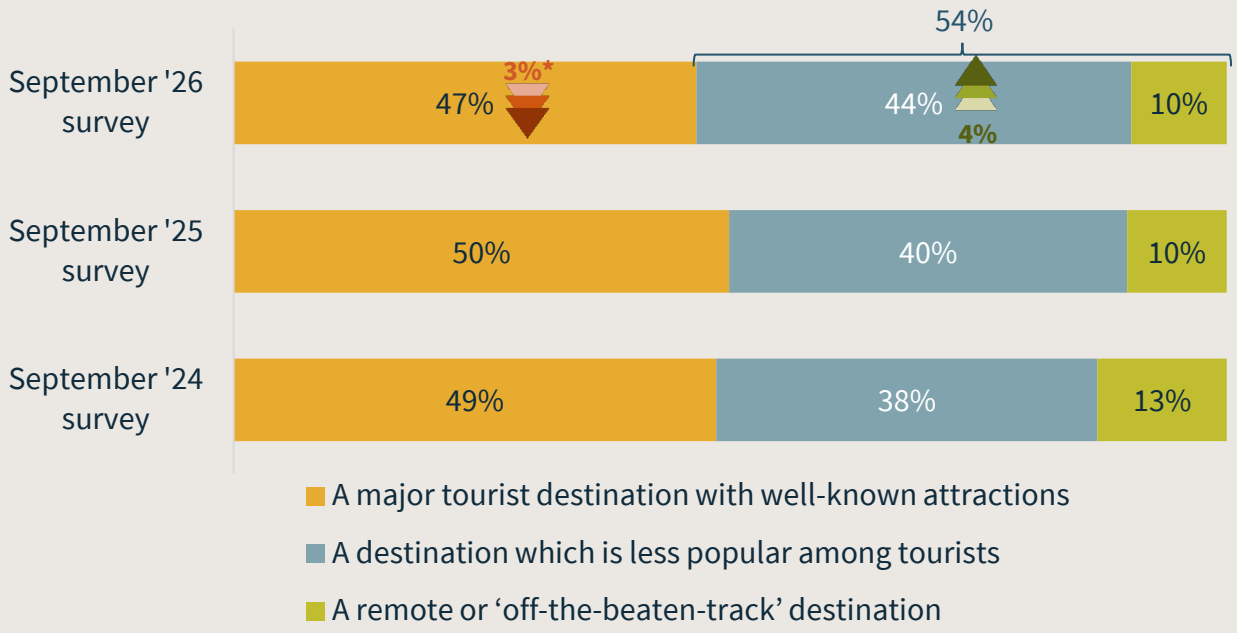


Q12. To which country(ies) do you plan to travel next?
**Minor discrepancies in totals are the result of rounding

No. of respondents: 5,402

54% of travellers favour less popular destinations, up 4%

Type of destination for the coming trip



Top five markets favouring tourism hotspots

Italy	54%	6%*
UK	53%	5%*
Spain	50%	
France	50%	
Germany	45%	

Top five markets favouring lesser-known or remote locations

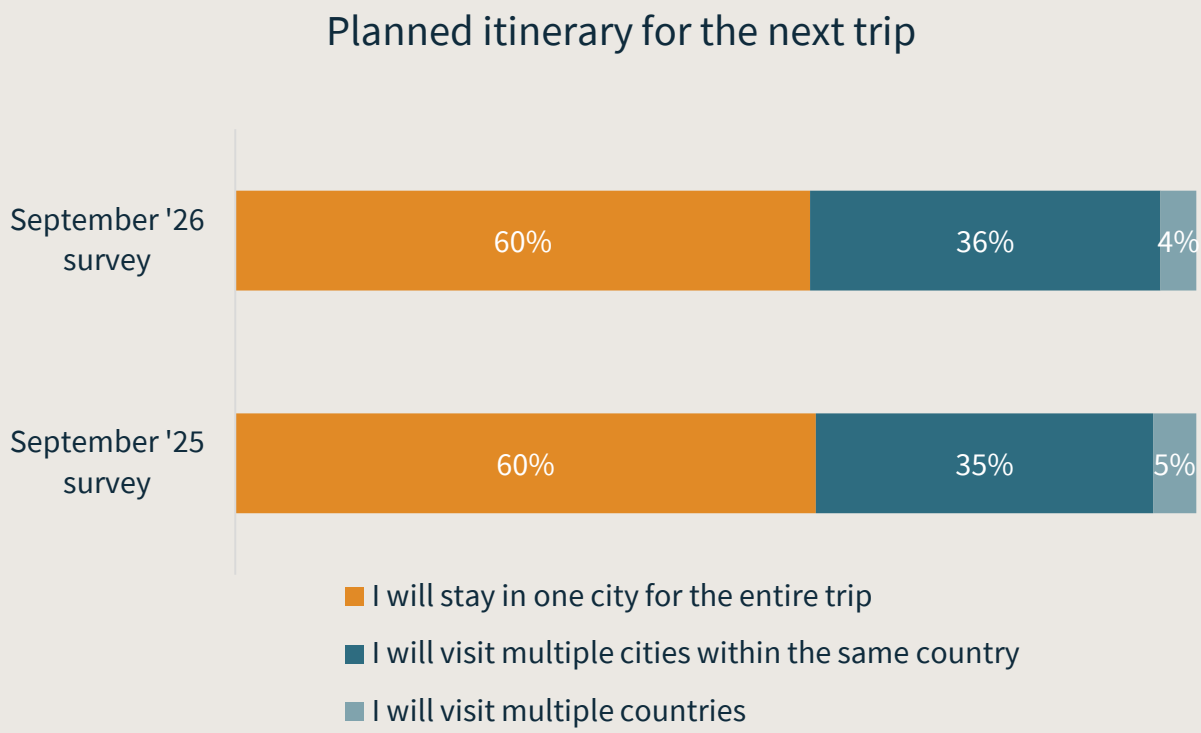
Netherlands	61%	7%
Switzerland	60%	
Poland	60%	7%
Belgium	57%	7%
Austria	57%	

Q13. 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 (September 2025)

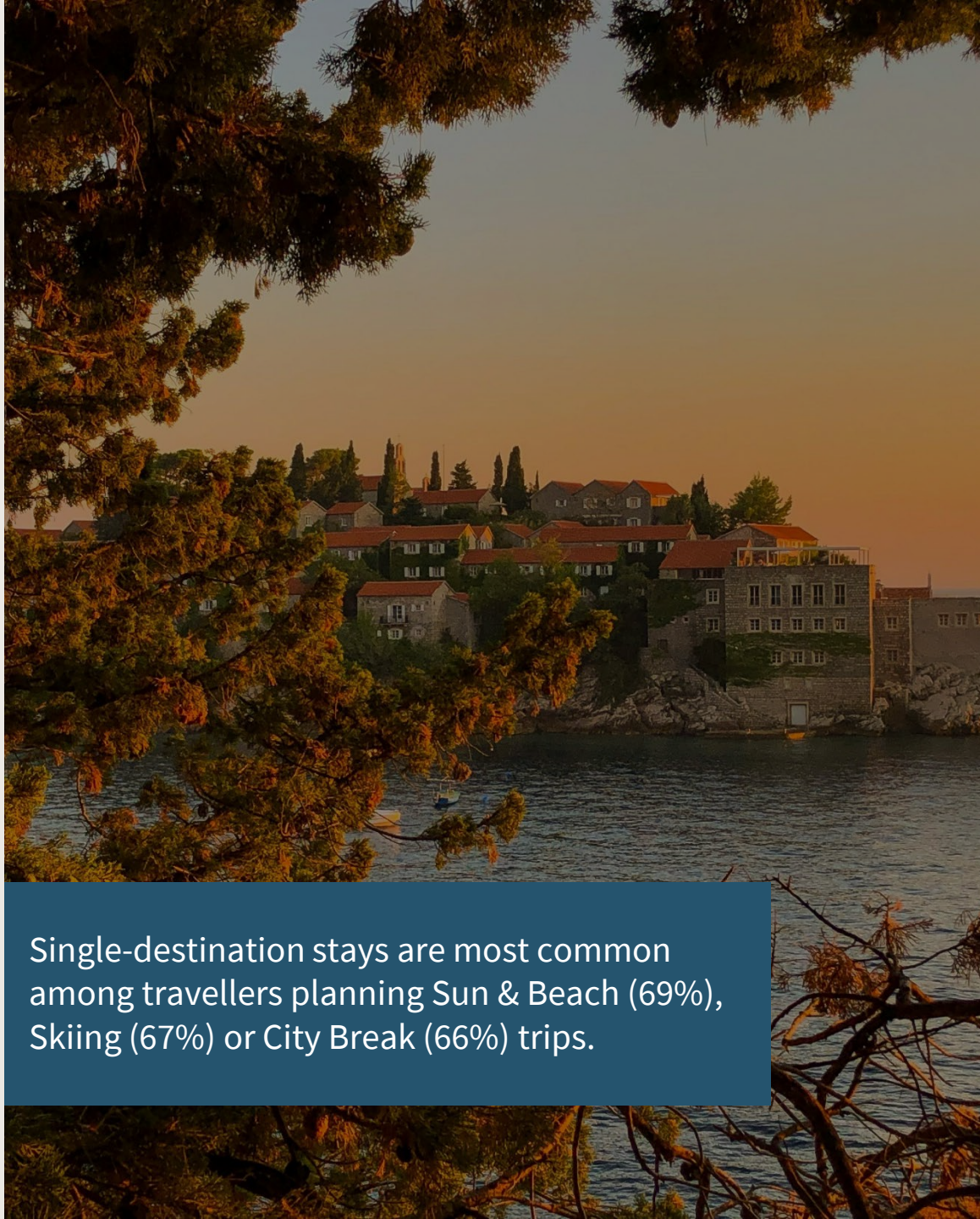
No. of respondents: 4,555

A stable 60% of Europeans plan to stay in one destination this autumn and winter



Q11. What kind of itinerary do you plan for your next trip within Europe?
* Statistically significant difference vs a year ago (September 2025)

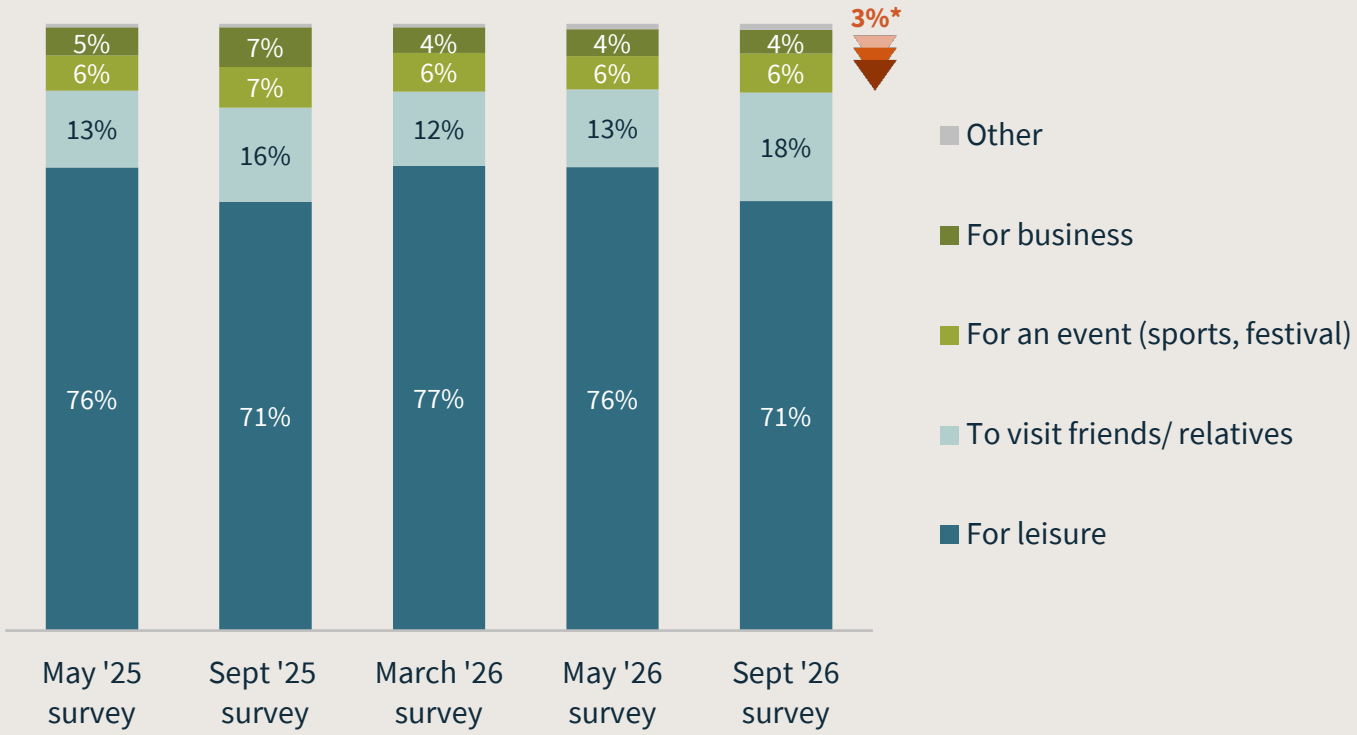
No. of respondents: 4,555



Single-destination stays are most common among travellers planning Sun & Beach (69%), Skiing (67%) or City Break (66%) trips.

Leisure continues to drive travel intentions, while a considerable 18% plan to visit friends and relatives ahead of the holiday season

Purpose of travel



Q8. For what reason are you most likely to travel within Europe next?
Minor discrepancies in totals are the result of rounding
* Statistically significant difference vs a year ago (September 2025)

No. of respondents: 4,555

Top three markets to take a leisure trip

Italy
79% ▲ 3%

Belgium
77%

Netherlands
76%

Top three markets to take a business trip

Germany
5%

Austria
5%

France
4%

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

As winter approaches, City Breaks and Culture & Heritage trips regain the lead

Preferred type of leisure trip in the next six months



Q17. What type of leisure trip within Europe are you most likely to undertake next?

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

No. of respondents: 4,555

Preferred type of experiences in the next six months

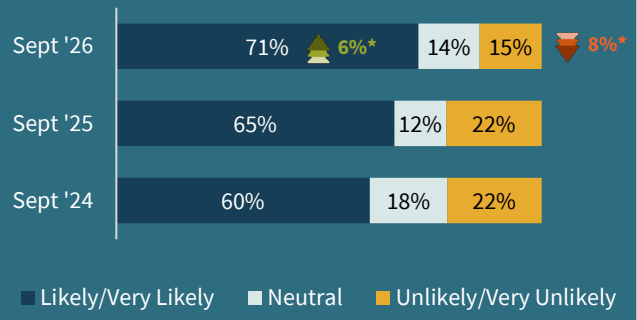


Q3. Which of the following travel experiences will you look for during your next trip in Europe?

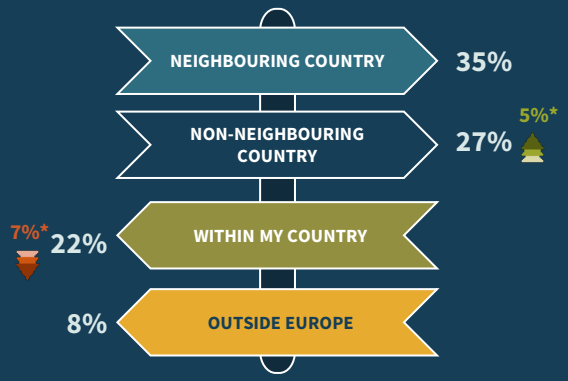
Austrians' travel plans

Travel horizon: October 2026-March 2027

INTENTION TO TRAVEL



WHERE TO?

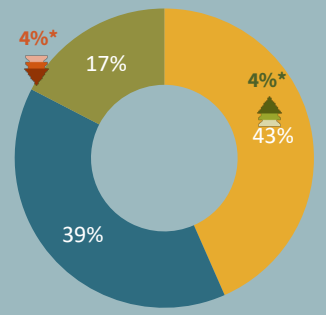


TRAVELLING WITH?



34%	35%	16% 4%*
With partner	With family	Solo

TYPE OF DESTINATION

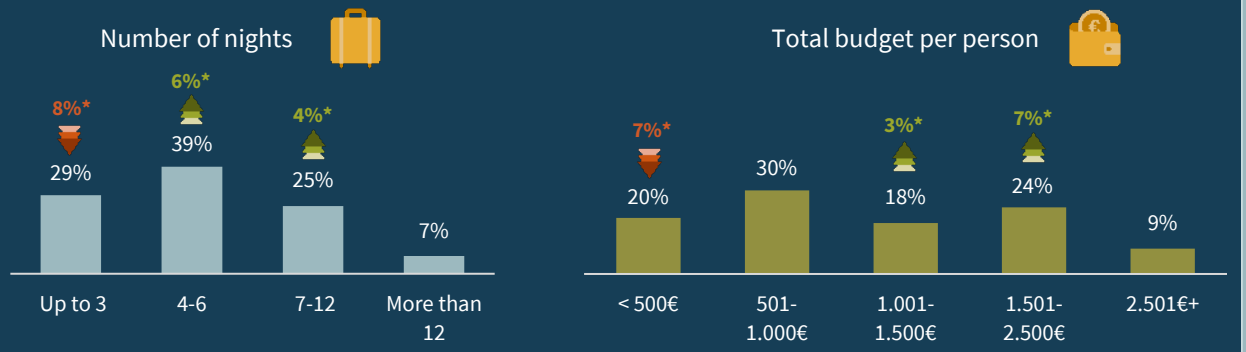


- A major tourist destination
- A less popular destination
- A remote, 'off-the-beaten-path' destination

TOP SPENDING PRIORITIES

31% 3%*	Accommodation
23%	Food & Drinks
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Germany	16% 3%*
Italy	14% 4%*
Spain	9%
Croatia	6%
Greece	4%

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

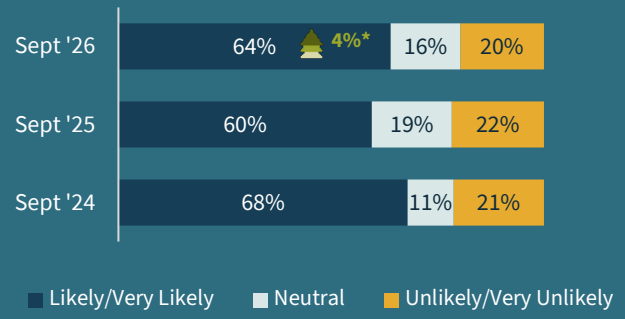
* Statistically significant difference vs a year ago (September 2025)

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

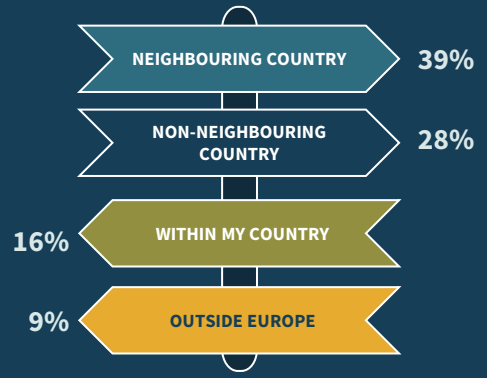
Belgians' travel plans

Travel horizon: October 2026-March 2027

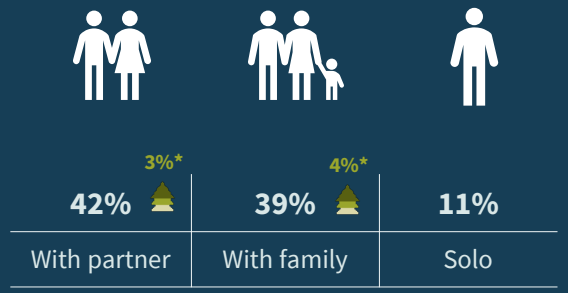
INTENTION TO TRAVEL



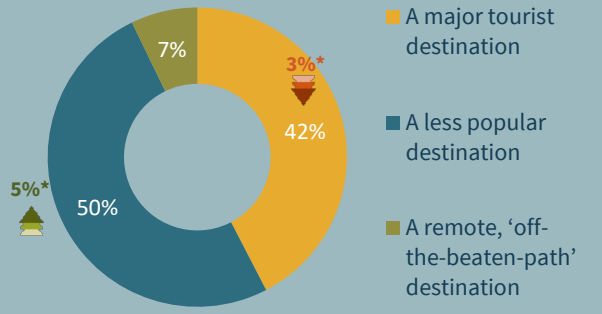
WHERE TO?



TRAVELLING WITH?



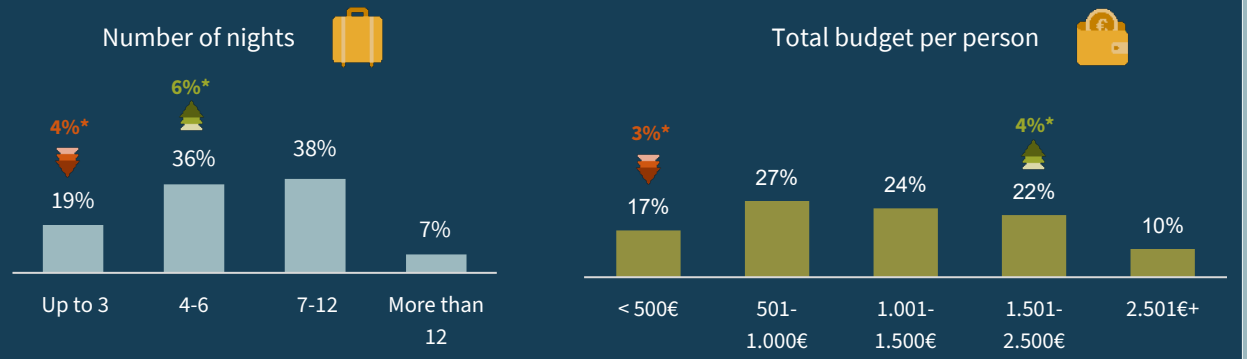
TYPE OF DESTINATION



TOP SPENDING PRIORITIES

27%	Accommodation
24%	Food & Drinks
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	26% 8%*
Spain	11% 5%*
Netherlands	8% 3%*
Italy	8%
Germany	6%

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

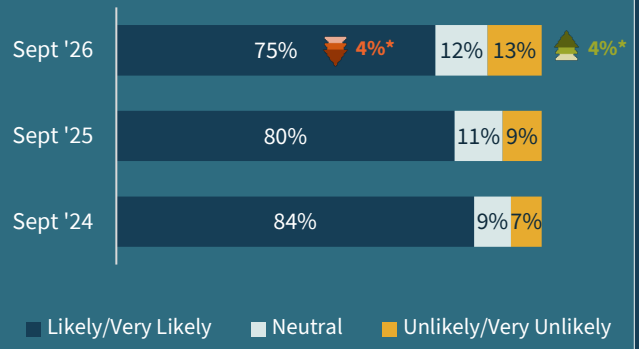
* Statistically significant difference vs a year ago (September 2025)

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

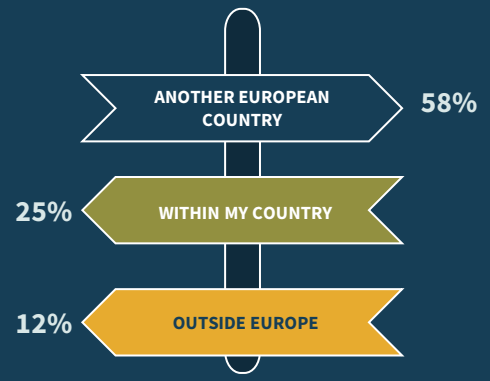
Britons' travel plans

Travel horizon: October 2026-March 2027

INTENTION TO TRAVEL



WHERE TO?

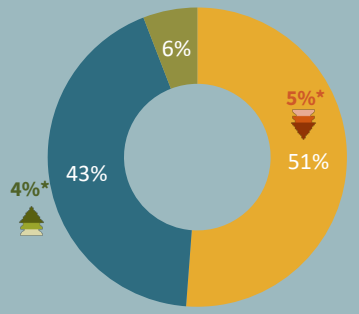


TRAVELLING WITH?



39%	35%	14% 3%*
With family	With partner	Solo

TYPE OF DESTINATION



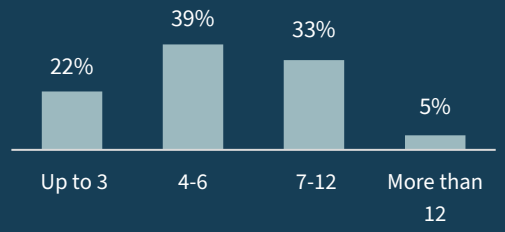
- A major tourist destination
- A less popular destination
- A remote, 'off-the-beaten-path' destination

TOP SPENDING PRIORITIES

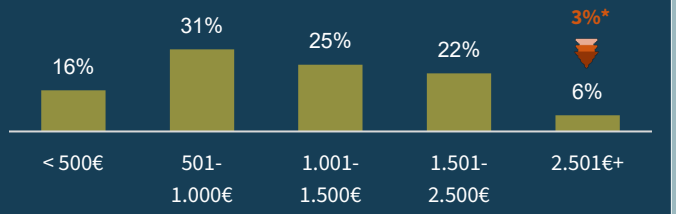
27%	Accommodation 4%*
27%	Food & Drinks 3%*
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	12% 5%*
France	11%
Italy	9%
Greece	7%
Germany	6%

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

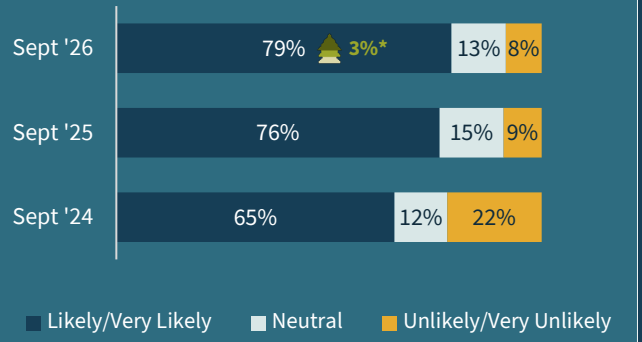
* Statistically significant difference vs a year ago (September 2025)

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

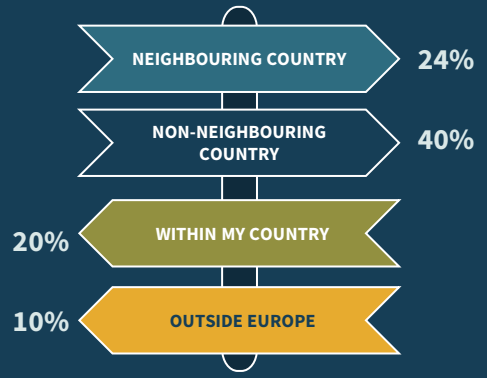
Dutch travel plans

Travel horizon: October 2026-March 2027

INTENTION TO TRAVEL



WHERE TO?

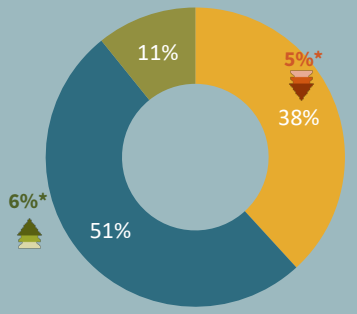


TRAVELLING WITH?



47%	28% 3%*	16%
With partner	With family	Solo

TYPE OF DESTINATION

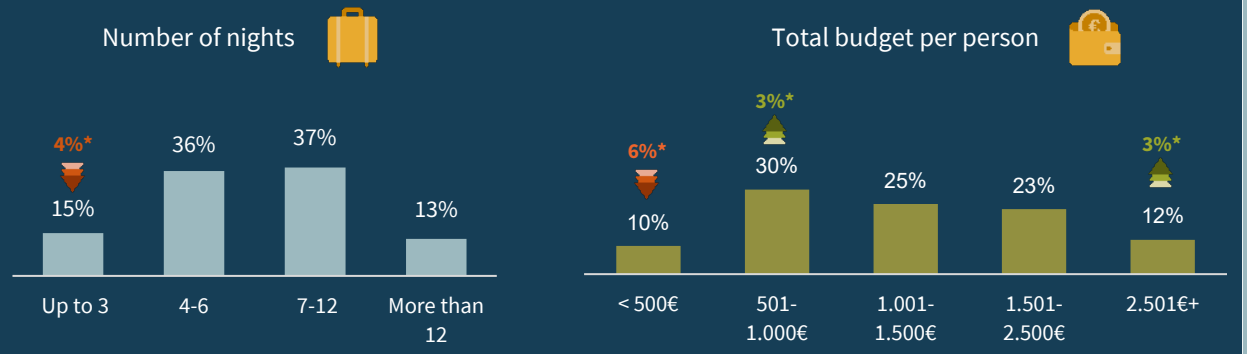


- A major tourist destination
- A less popular destination
- A remote, 'off-the-beaten-path' destination

TOP SPENDING PRIORITIES

30%	Accommodation 4%*
25%	Food & Drinks
12%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	16%
Germany	14%
France	9%
Belgium	9%
Italy	7%

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

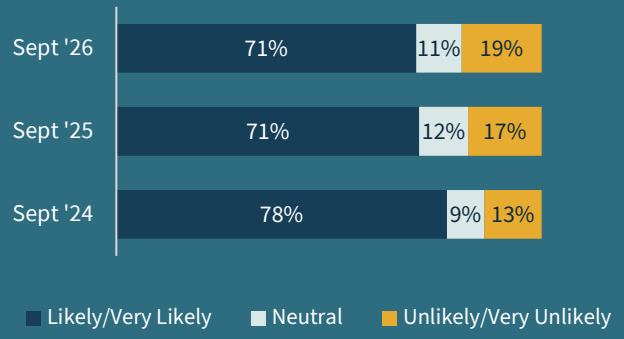
* Statistically significant difference vs a year ago (September 2025)

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

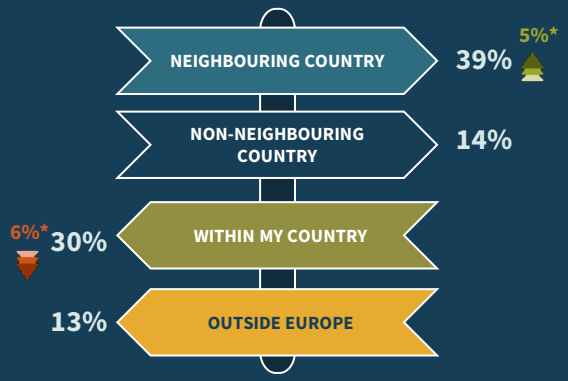
French travel plans

Travel horizon: October 2026-March 2027

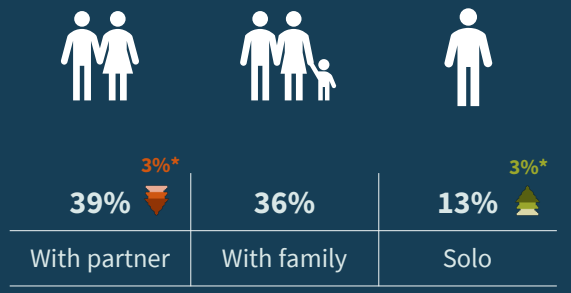
INTENTION TO TRAVEL



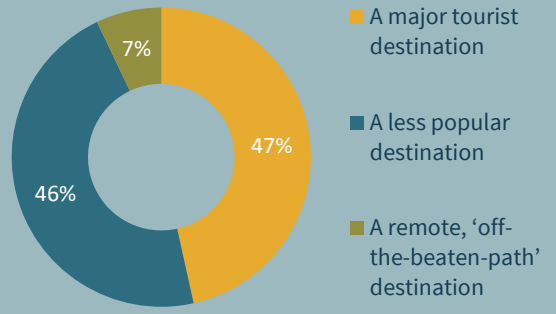
WHERE TO?



TRAVELLING WITH?



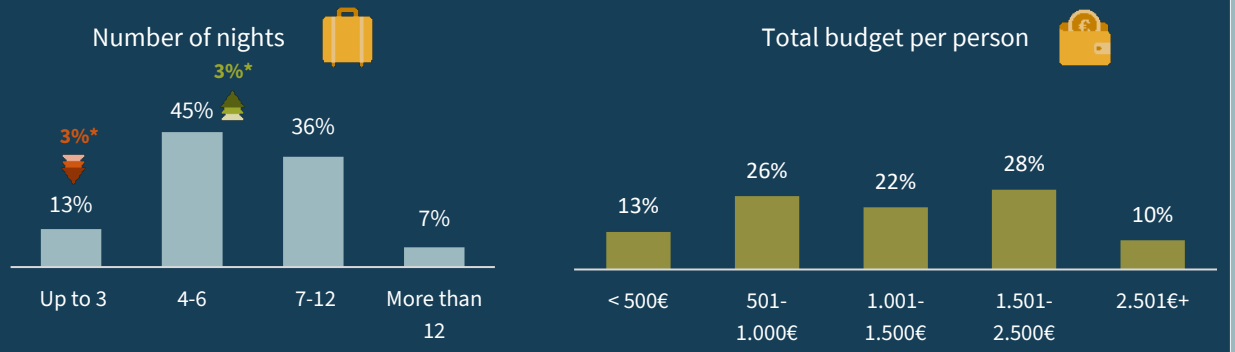
TYPE OF DESTINATION



TOP SPENDING PRIORITIES



INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	15% 4%*
Spain	11%
Portugal	7%
Greece	6%
UK	6%

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

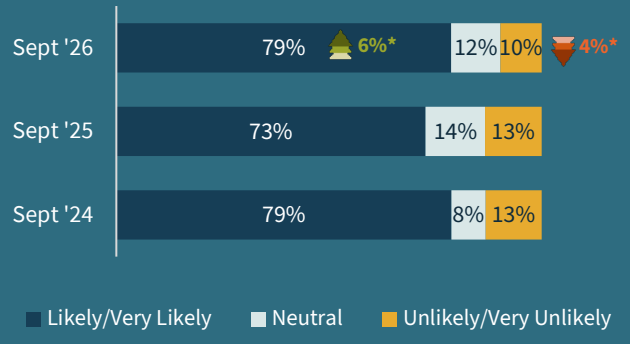
* Statistically significant difference vs a year ago (September 2025)

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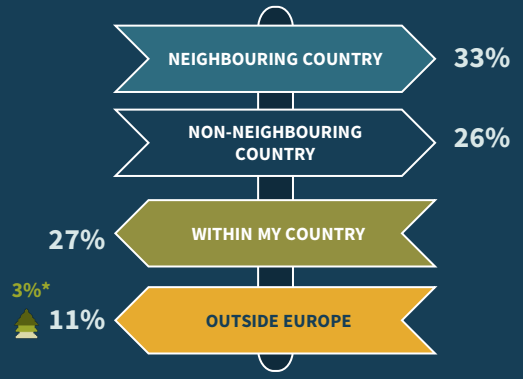
Germans' travel plans

Travel horizon: October 2026-March 2027

INTENTION TO TRAVEL



WHERE TO?

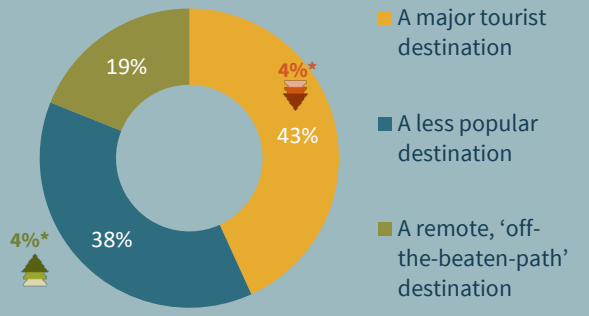


TRAVELLING WITH?



39% 5%*	32%	18%
With partner	With family	Solo

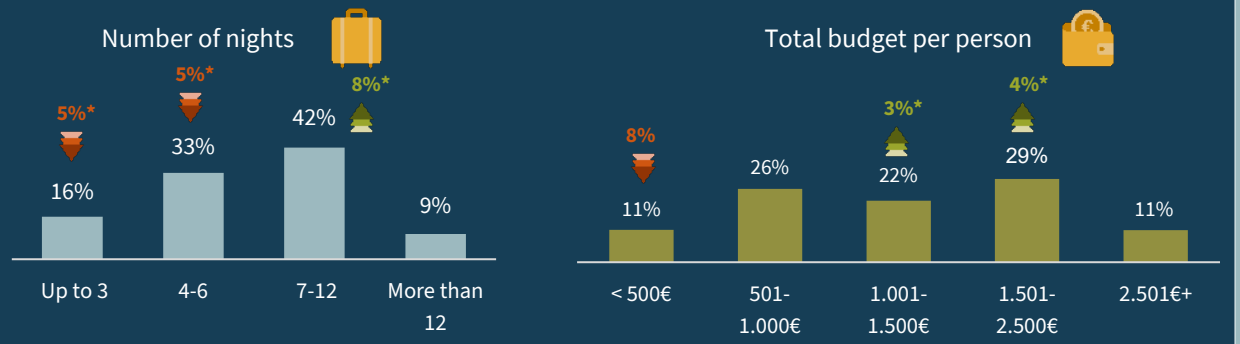
TYPE OF DESTINATION



TOP SPENDING PRIORITIES

29%	Accommodation 4%*
19%	Food & Drinks
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Austria	11%
Spain	10%
Italy	8%
France	8%
Netherlands	7%

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

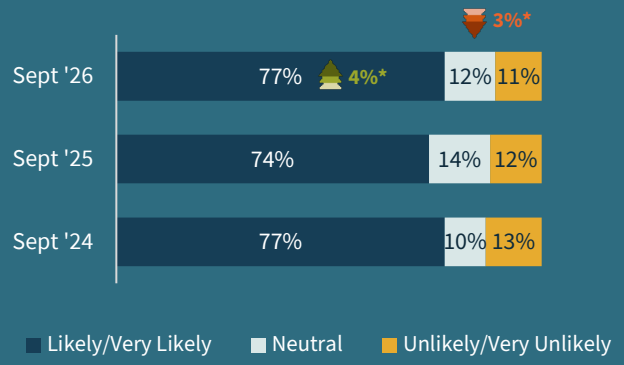
* Statistically significant difference vs a year ago (September 2025)

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

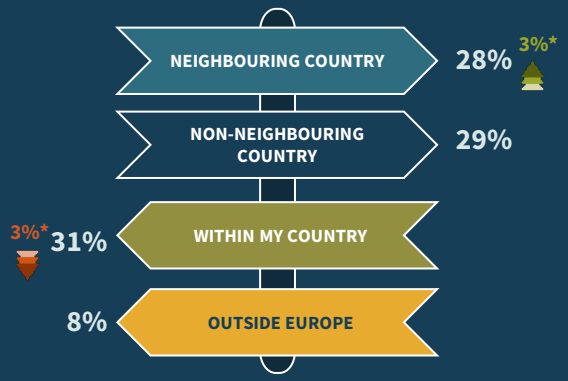
Italians' travel plans

Travel horizon: October 2026-March 2027

INTENTION TO TRAVEL



WHERE TO?

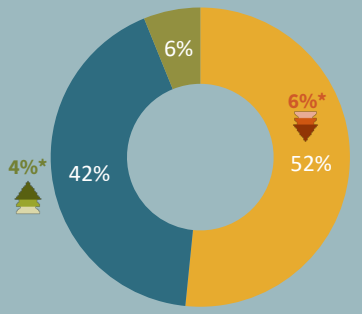


TRAVELLING WITH?



39%	37%	9%
With partner	With family	Solo

TYPE OF DESTINATION

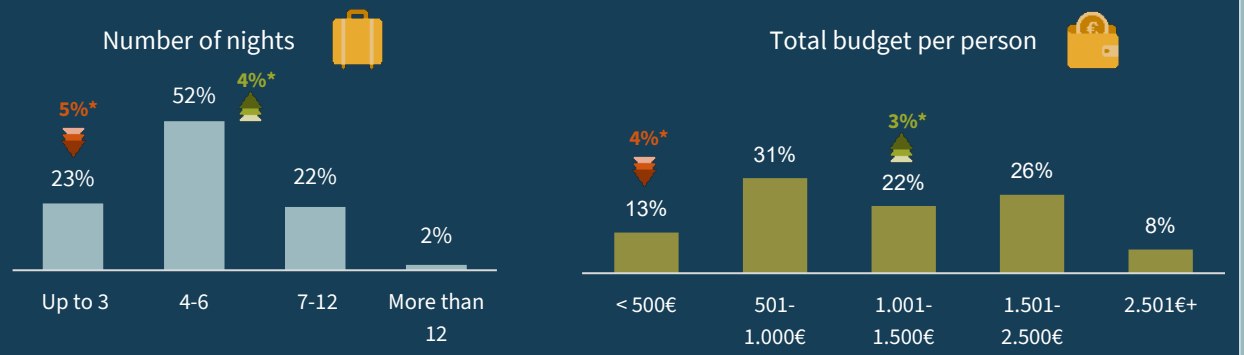


- A major tourist destination
- A less popular destination
- A remote, 'off-the-beaten-path' destination

TOP SPENDING PRIORITIES

27%	Accommodation
23%	Food & Drinks
17%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	14% 3%*
Spain	12%
UK	7% 3%
Austria	7%
Germany	6%

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

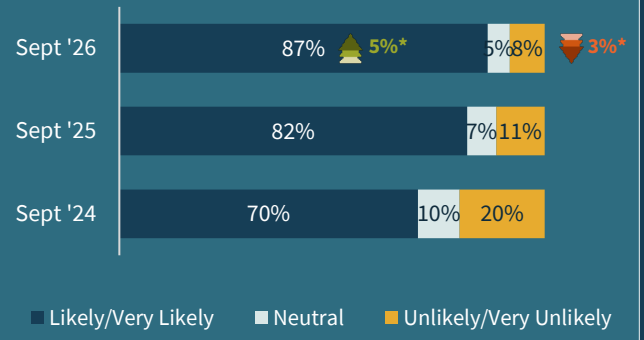
* Statistically significant difference vs a year ago (September 2025)

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

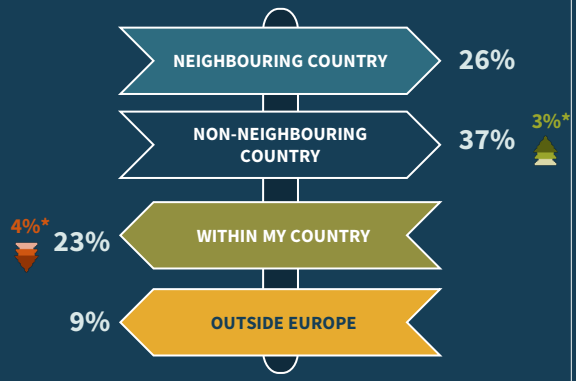
Poles' travel plans

Travel horizon: October 2026-March 2027

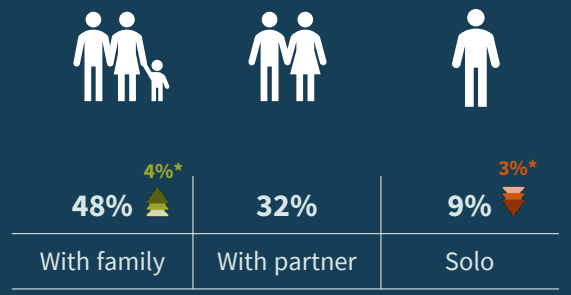
INTENTION TO TRAVEL



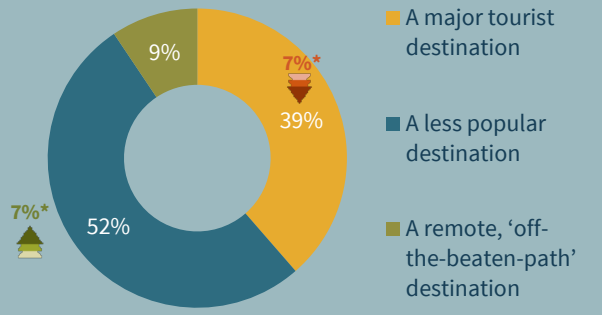
WHERE TO?



TRAVELLING WITH?



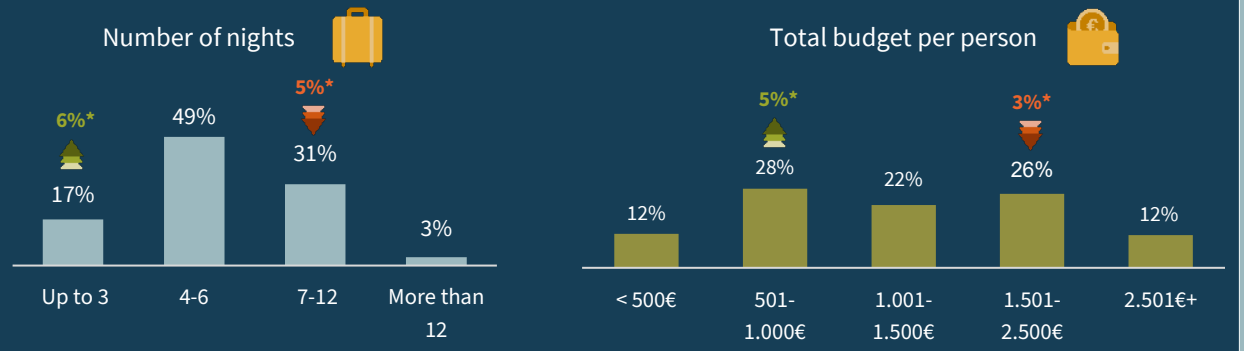
TYPE OF DESTINATION



TOP SPENDING PRIORITIES

28%	Accommodation 5%*
20%	Food & Drinks
18%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	13% 3%*
Germany	9% 3%*
Spain	8% 3%*
Czech Republic	7%
Austria	4%

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

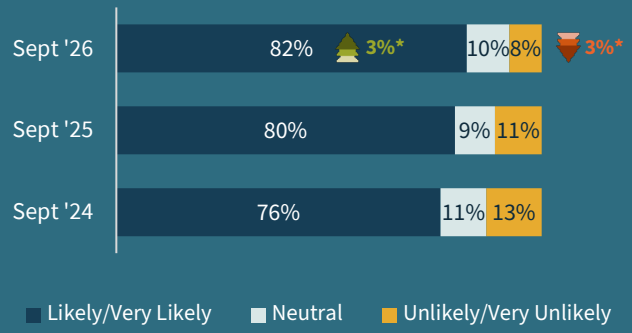
* Statistically significant difference vs a year ago (September 2025)

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

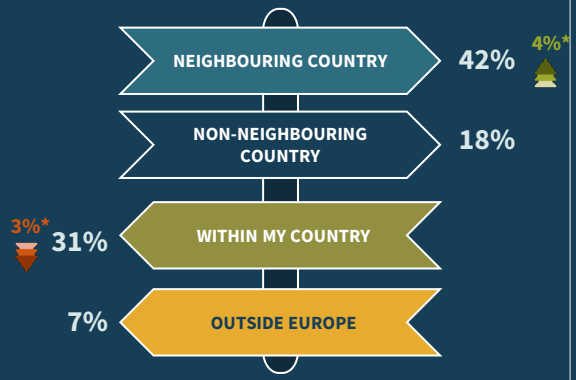
Spaniards' travel plans

Travel horizon: October 2026-March 2027

INTENTION TO TRAVEL



WHERE TO?

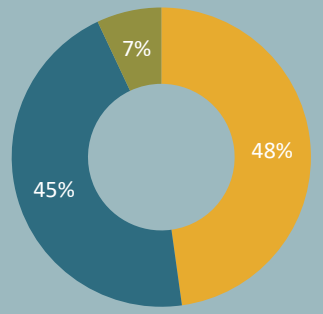


TRAVELLING WITH?



41%	37%	11%
With partner	With family	Solo

TYPE OF DESTINATION

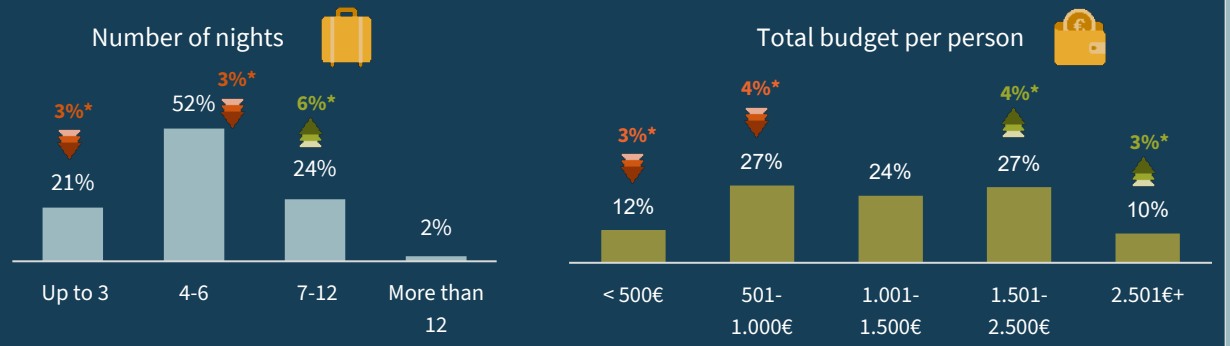


- A major tourist destination
- A less popular destination
- A remote, 'off-the-beaten-path' destination

TOP SPENDING PRIORITIES

27%	Accommodation
24% 3%*	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	17% 3%*
Italy	13%
UK	10%
Germany	8%
Portugal	7%

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

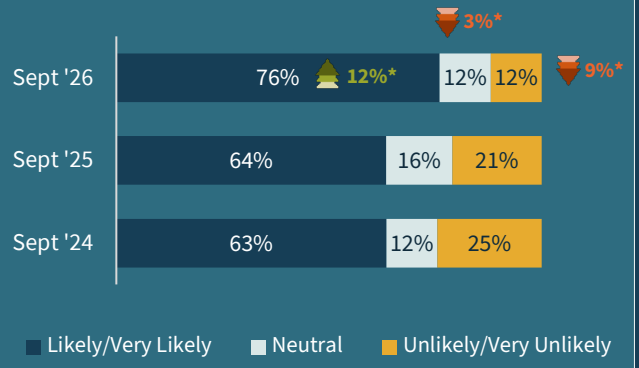
* Statistically significant difference vs a year ago (September 2025)

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

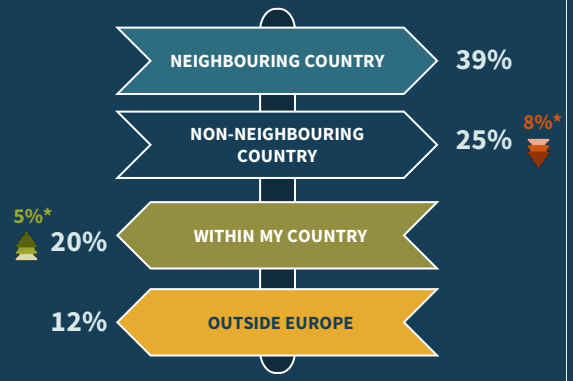
Swiss travel plans

Travel horizon: October 2026-March 2027

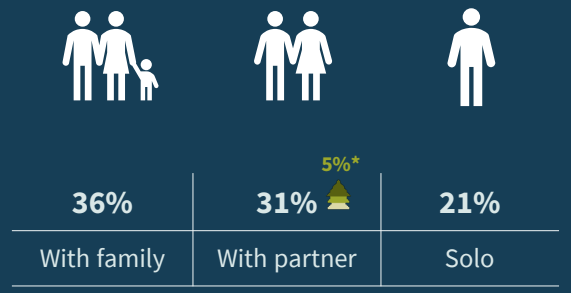
INTENTION TO TRAVEL



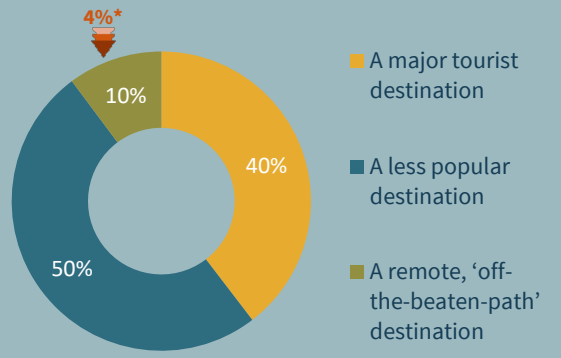
WHERE TO?



TRAVELLING WITH?



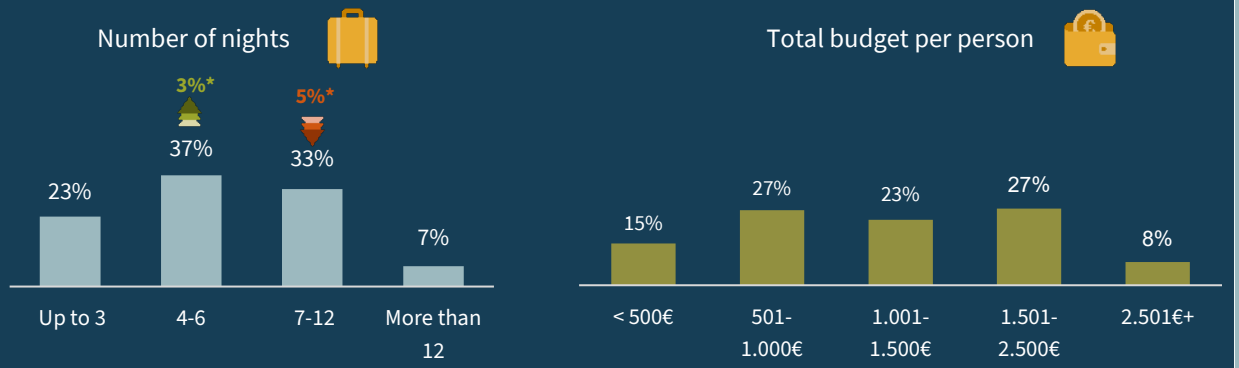
TYPE OF DESTINATION



TOP SPENDING PRIORITIES



INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	14% 6%*
Italy	14%
Germany	12% 3%*
Austria	7%
Spain	5% 5%*

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

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

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



Planning the details

02

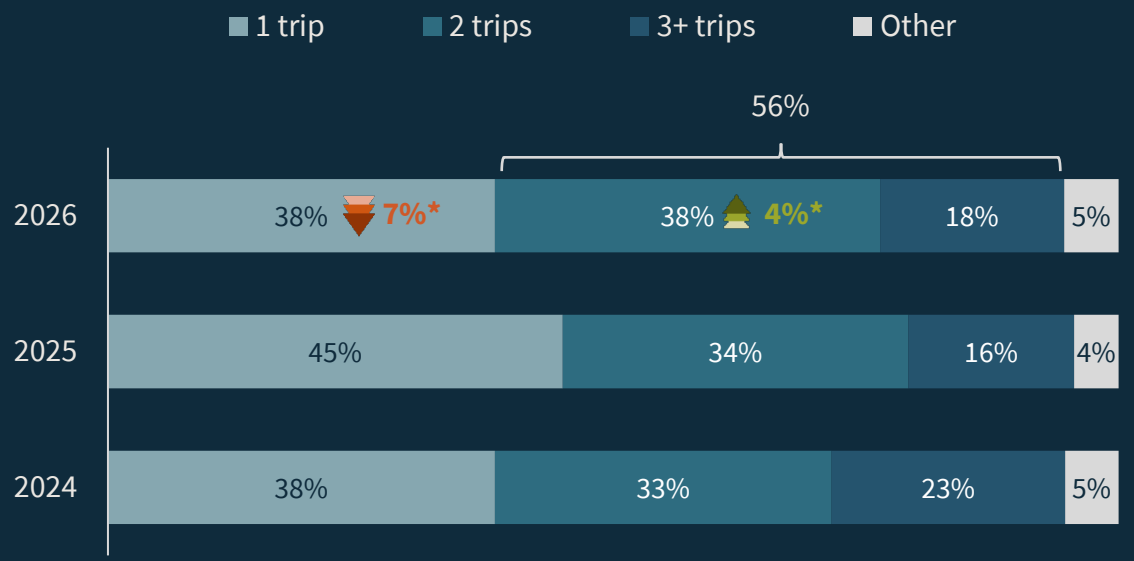


The share of Europeans planning multiple trips this autumn and winter rises by 6%

The share of travellers planning three or more trips declines with age, from 27% among those aged 18–24 to 11% among those aged 55+.

EUROPEAN TRAVEL COMMISSION

Number of intended trips within Europe in the next six months

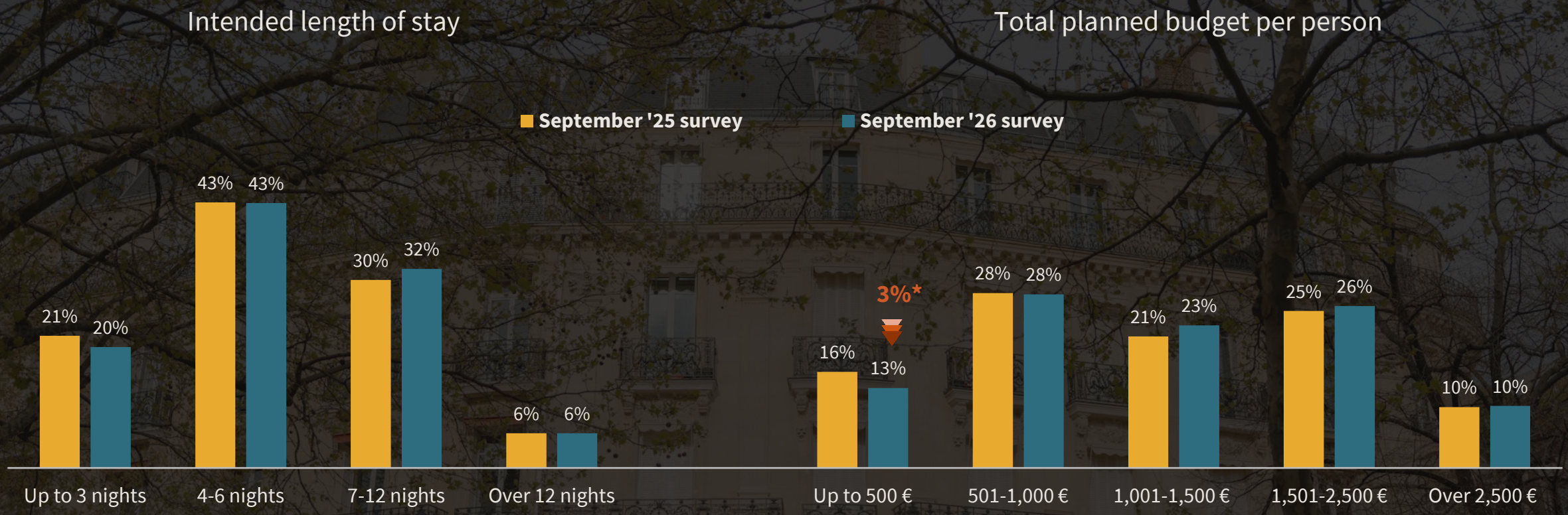


Q7. How many trips do you plan to take in the next 6 months, within Europe?
Minor discrepancies in totals are the result of rounding
* Statistically significant difference vs a year ago (September 2025)

No. of respondents: 4,555

Europeans' length of stay and planned budget hold steady

Stays of 4–6 nights remain the most popular option, while the share of trips budgeted below €500 falls by 3%



Q18. What would be the length of your next overnight trip?
Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

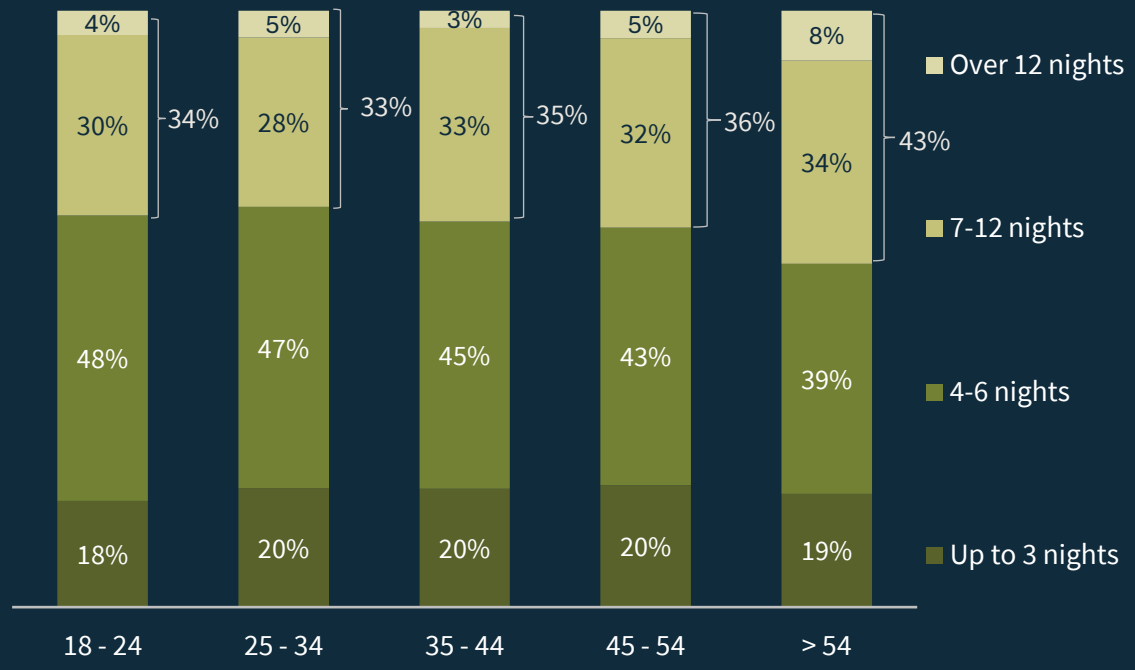
Minor discrepancies in totals are the result of rounding

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

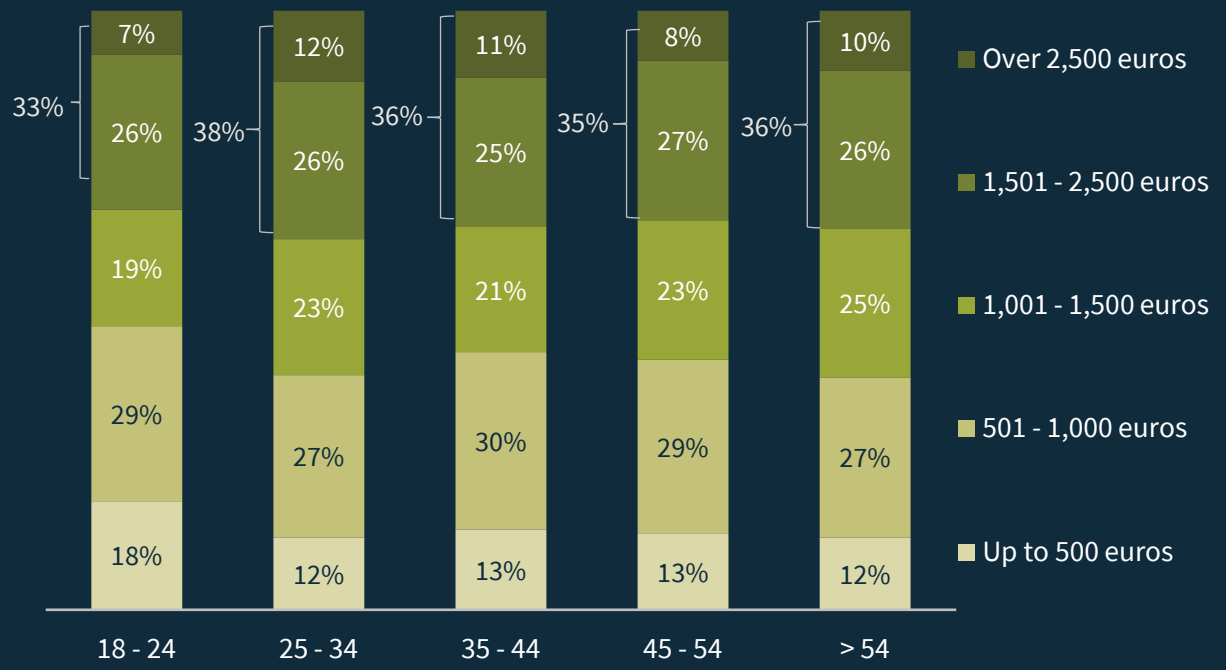
No. of respondents: 4,555

Travellers aged 55+ are most likely to stay over a week, while budgets are broadly similar among travellers over 25

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

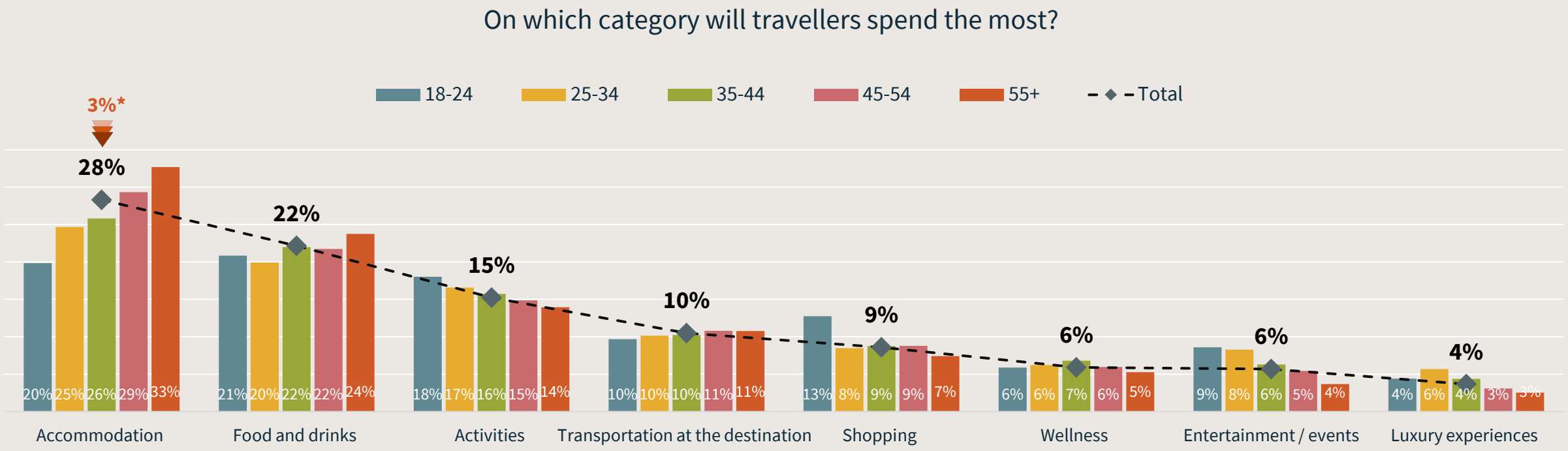
Q18. What would be the length of your next overnight trip?
Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

Minor discrepancies in totals are the result of rounding

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

No. of respondents: 4,555

Planned accommodation spending rises with age, while younger travellers lead spending on activities, shopping and entertainment





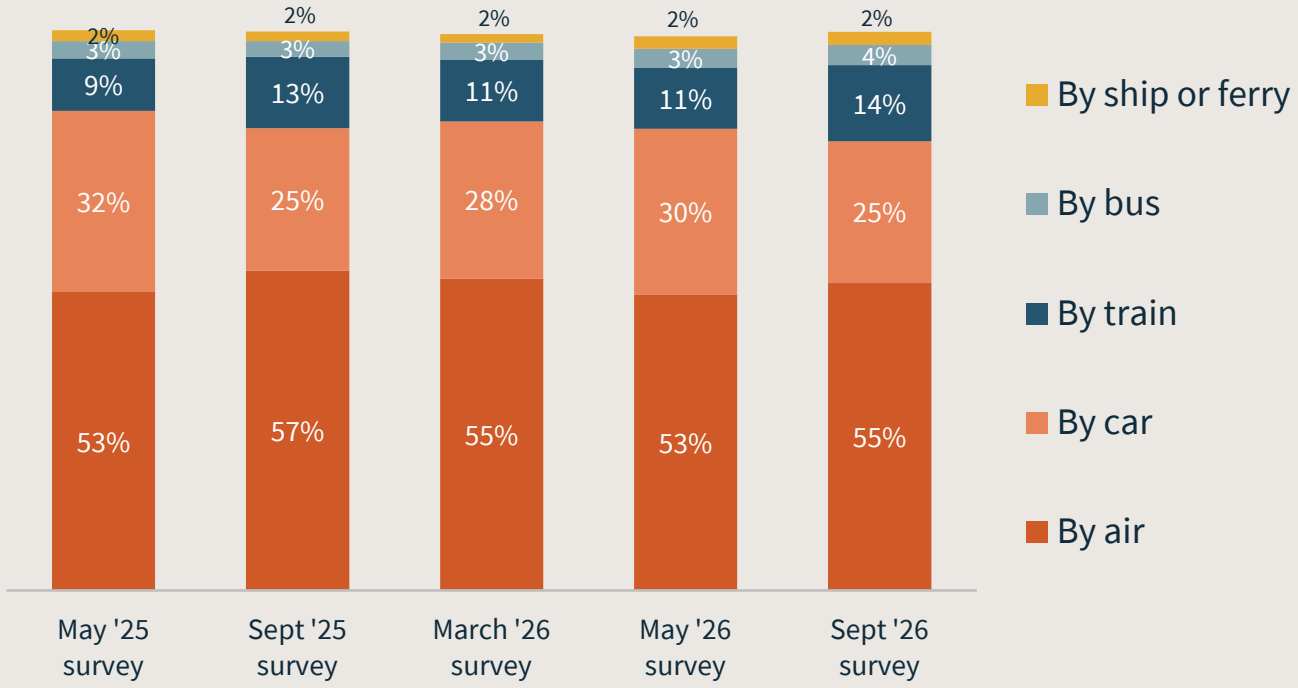
Spending on food and drinks is a top priority among travellers seeking to taste local cuisine, experience local culture and learn about history and cultural heritage - highlighting culinary offerings as a gateway to authentic local experiences.

Q21. For your next trip to Europe, which of the following categories do you expect to spend the most on?

No. of respondents: 4,555

Transport preferences remain stable across recent waves, with air travel firmly in the lead

Preferred modes of transport for intra-European travel



Top three reasons for flying

Speed

26%

Value for money

22%

Easy to plan & book

13%

Top three reasons for driving

Comfort

21%

Easy to plan & book

18%

Value for money

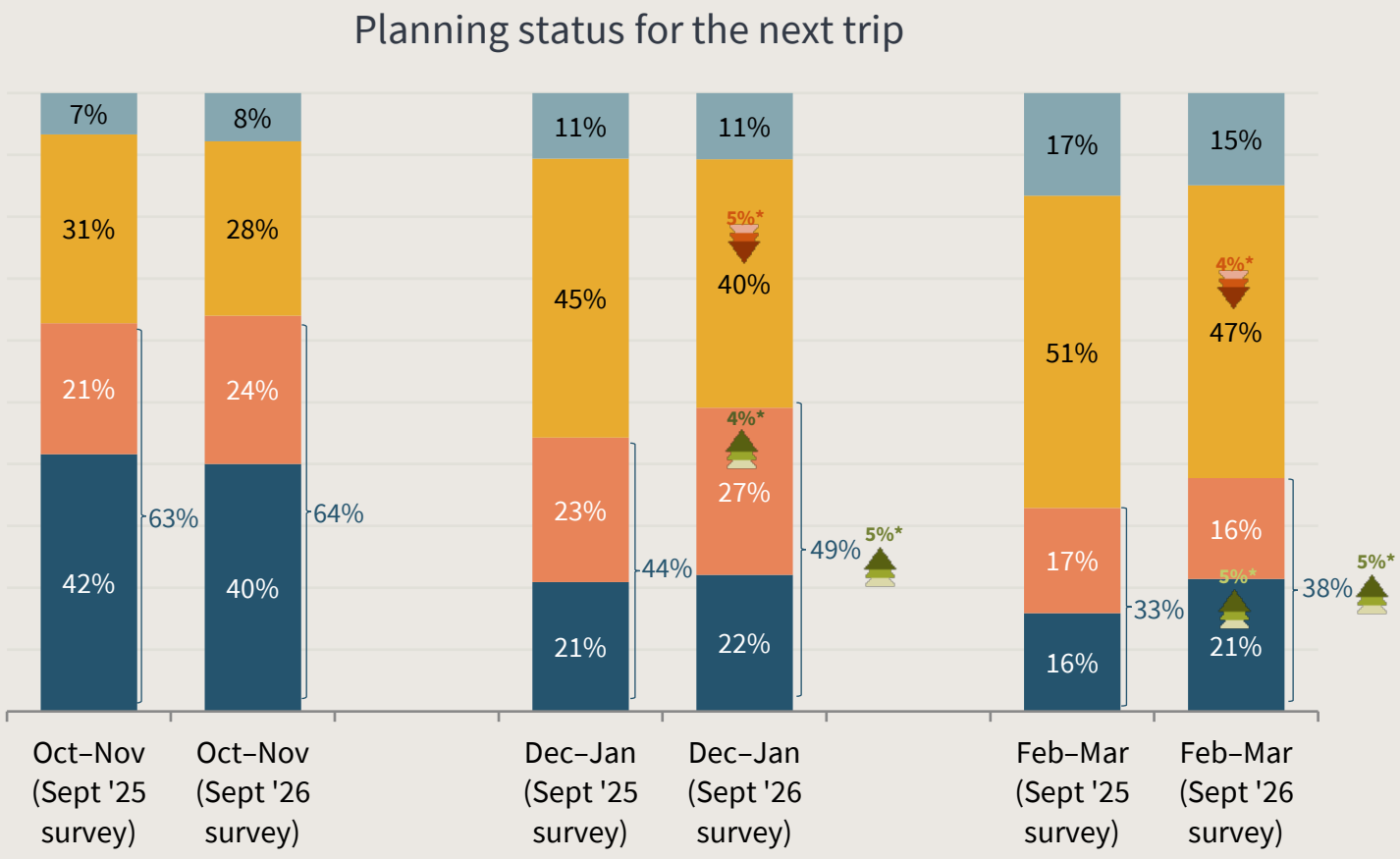
18%

Q14. Which of the following modes of transport would you most consider using during your next trip within Europe?

No. of respondents: 4,555

Travellers are booking earlier this year: +5% for winter (49%) and early spring trips (38%), where travel intentions are also up

55% of travellers are yet to book any component of their trip between October and March



I have not yet chosen where I will travel next

I have chosen where I want to go but not yet booked/arranged my trip

I have partially booked/arranged my next trip (accommodation or transport only)

I have booked/arranged all travel and accommodation components for my next trip

Among total travellers, 50% of those aged 18–44 have fully or partially booked their next trip, compared with 40% of older travellers, potentially reflecting preference for early-bird deals among younger age groups.

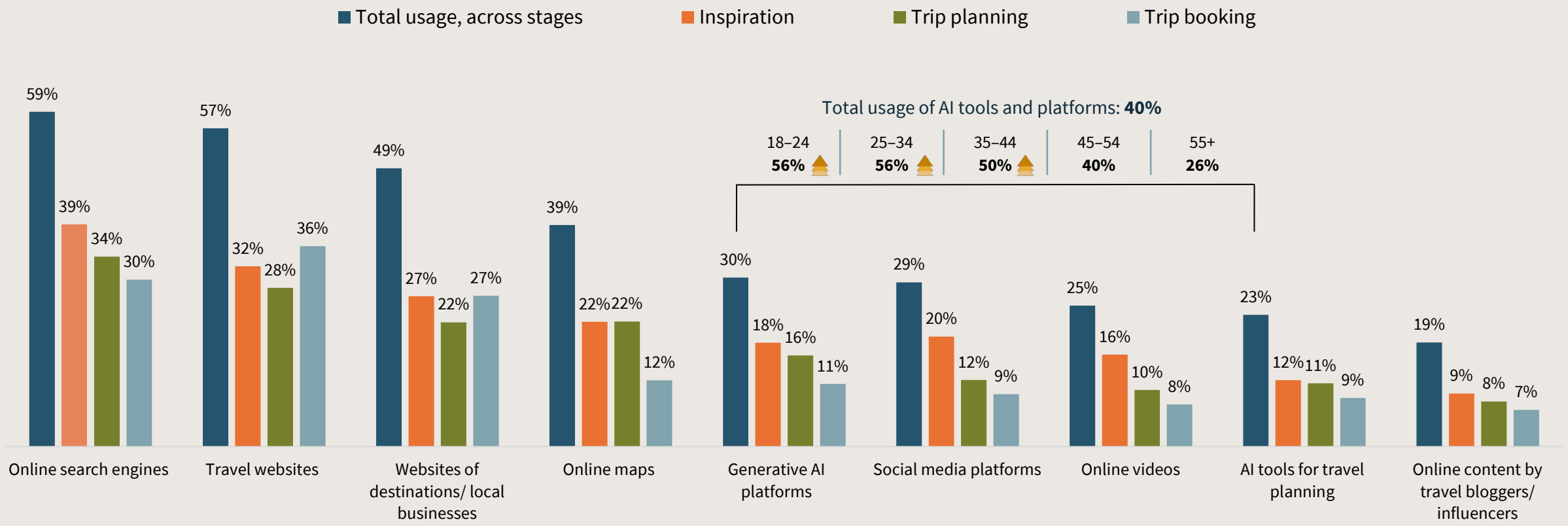
Q20. Please select a response which best describes the planning for your next trip

**Minor discrepancies in totals are the result of rounding * Statistically significant difference vs a year ago (September 2025)

No. of respondents: 4,555

Which digital tools do European travellers use for their trips?

Search engines and travel websites lead Europeans' digital travel journey,
while AI tools and platforms are being used by 40%, and to a considerably higher extent among younger generations



At the trip planning stage, 21% of travellers aged 18–44 use generative AI, compared with 10% of those aged 55+

NOTE: This is a new question, included in the September 2026 wave

Q22. Which digital tools have you used (or will use) when planning a trip to Europe?

% indicates a statistically significant increase vs total travellers

No. of respondents: 4,555

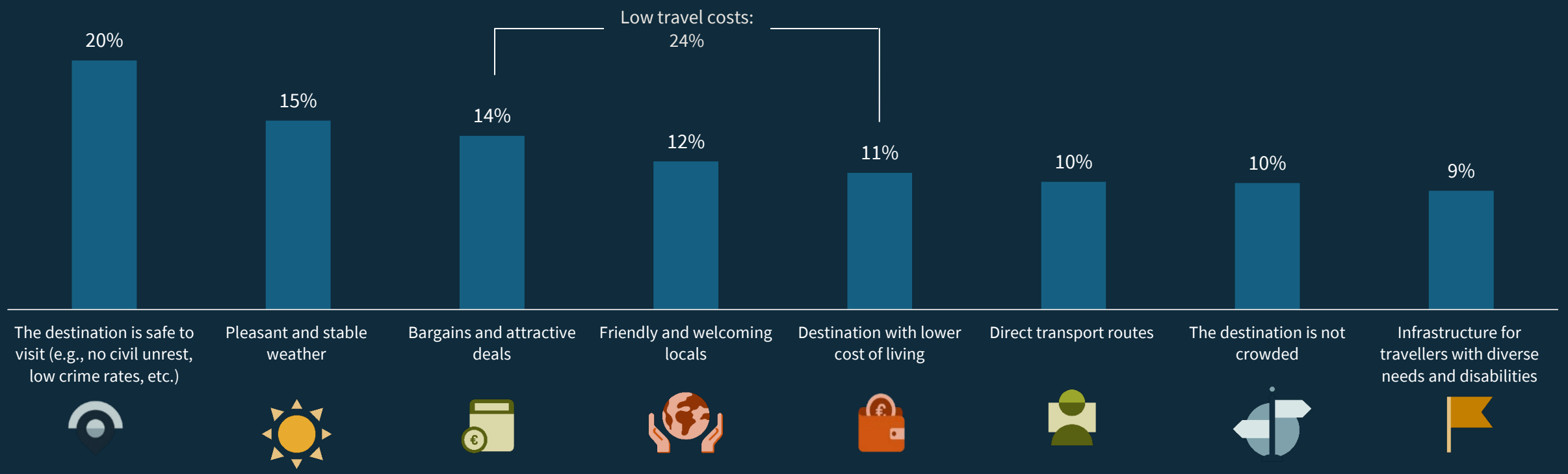


Travel considerations

03

Europeans consistently prioritise safety, pleasant weather and affordability when choosing destinations

Europeans' top criteria in choosing a travel destination



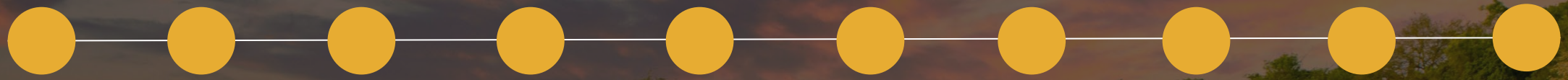
Q2. What criteria will play the most important role in choosing your next holiday destination?

Minor discrepancies in totals are the result of rounding

No. of respondents: 6,000

What do European travellers worry about?

Financial pressures remain travellers' leading concern (37%), followed by geopolitical instability (23%)



20% Rise in the overall cost of my trip due to inflation

16% Economic situation and personal finances

12% The ongoing conflict between Russia and Ukraine

11% Potential impact on travel safety due to tensions in the Middle East

10% Extreme weather events

9% Too many visitors at the destinations I want to visit

8% Disruptions in transport options due to strikes or under-staffing

4% Booking and cancellation policies (refunds, etc.)

4% The environmental footprint of my travel

3% Local demonstrations against tourism

Potential travel disruptions due to Middle East tensions concerns 58% of Europeans planning to fly, compared with just 8% of those using other modes of transport.

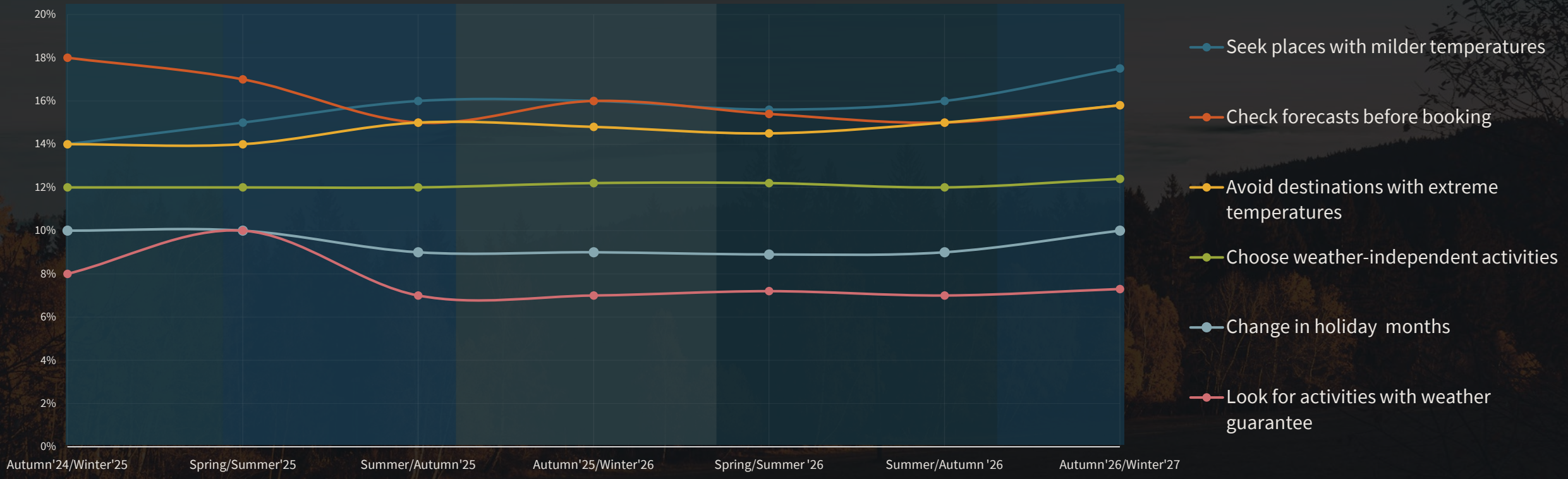
* Statistically significant difference vs a year ago (September 2025)
Minor discrepancies in totals are the result of rounding

No. of respondents: 6,000

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

Europeans seek milder temperatures and fewer weather extremes, prioritising stable conditions at the destination

Climate adaptation behaviours across travel seasons



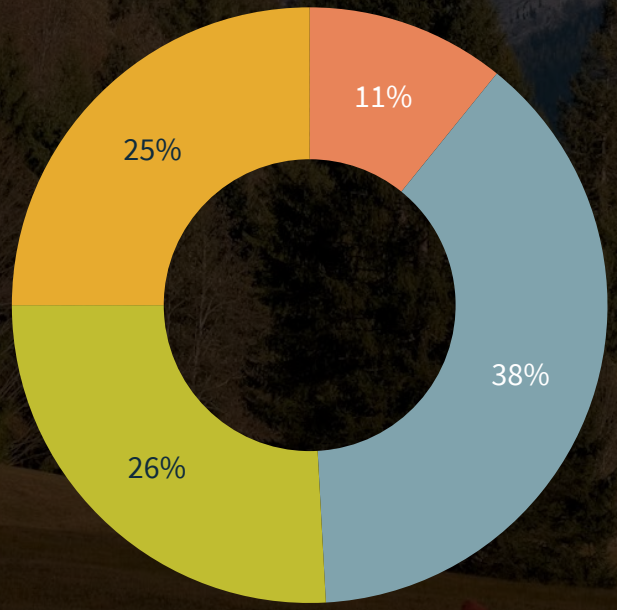
Q23. How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) been influencing your travel habits?

No. of respondents: 6,000

The impact of geopolitical conflicts on travel decisions

89% of Europeans adapt their travel choices to geopolitical tensions, primarily by avoiding destinations perceived as unsafe

Impact of geopolitical tensions on destination choice



- Do not consider geo-conflicts at all when choosing a destination
- Avoid destinations where geo-conflicts may pose direct risks to my safety
- Avoid destinations where geo-conflicts may disrupt my travelling experience
- Avoid all destinations with geo-conflicts, regardless of risk type or severity

Top three markets that only avoid direct safety risks

Poland 45%

UK 43%

Spain 43%

Top three markets that avoid any disruption to their travel experience

Germany 28%

France 27%

Netherlands 26%

Q24. To what extent do geopolitical conflicts, such as diplomatic tensions, trade disputes, immigration barriers, or travel restrictions between countries (excluding war), influence your travel decisions?

No. of respondents: 6,000



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 (2024-2025/26)
- Distribution/data collection period:
  - **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 / **Wave 26**: 15-30 September 2026, sample = 6,000
  - **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 (7 questions) and travel intentions, preferences and trip planning (16 questions)
- 50% of the Wave 26 survey respondents are male and 50% are female. Sample size and age groups are listed below:

Age	UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	Total
18–24	80	70	45	37	85	65	66	27	36	20	**531**
25–34	125	100	65	89	110	105	121	48	88	66	**917**
35–44	125	110	85	118	115	120	141	90	108	98	**1,110**
45–54	120	140	100	106	120	110	108	150	108	111	**1,173**
55+	300	330	205	150	320	350	64	185	160	205	**2,269**
Total	**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**500**	**500**	**6,000**

- **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

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Study on Monitoring Sentiment for Intra-European Travel

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Data sources: This report is based on research conducted by MINDHAUS (www.mindhaus.gr) and should be interpreted by users according to their needs.

MINDHAUS
Tourism Marketing Strategy

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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