# Long-Haul Travel Barometer 2/2025

Travel horizon:
May-August 2025

eurail

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

# Contents

Methodology
Page 03

Travel intentions and barriers
Pages 04 - 11

Planning details
Pages 12-20



# Methodology

## Target

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

## Data collection period

- 7-20 April 2025
- Travel horizon: May-August 2025

## Frequency

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

## Analysed samples

- Total respondents: 7,100
- Respondents likely to travel long-haul to Europe: 2,809
- Respondents likely to travel long-haul but not to Europe: 1,261
- Respondents not likely to travel long-haul: 3,030

## Method

1,000 online interviews with national representatives (18-70 years old), per market, per wave.

## Significant changes

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

Increase ▲ Decrease ▼

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

# Travel intentions and barriers

Travel horizon:
May-August 2025

Sample size
per market 1,000

01

# Global turbulence hampers travel sentiment in key markets

- While global tourism continues to show resilience in 2025, the persistent economic uncertainty, geopolitical tensions, and growing cost concerns are weighing on travel decisions. **57% of respondents in major markets plan to travel overseas between May and August 2025.** This marks a slight but statistically significant drop of 1% from last year.
- Intentions to visit Europe have also declined, falling from 41% in 2024 to 39% in 2025. This drop is mainly driven by respondents in the US (-7%), Brazil (-6%), Canada, and Japan (both -5%), where interest in Europe has softened notably ahead of the summer season.
- On the other end of the spectrum, **China stands out as a major exception.** Driven by a strong economic rebound and expectations for a record-breaking outbound travel, 72% of Chinese respondents now say they plan to visit Europe this summer - a remarkable 10% increase over last year.

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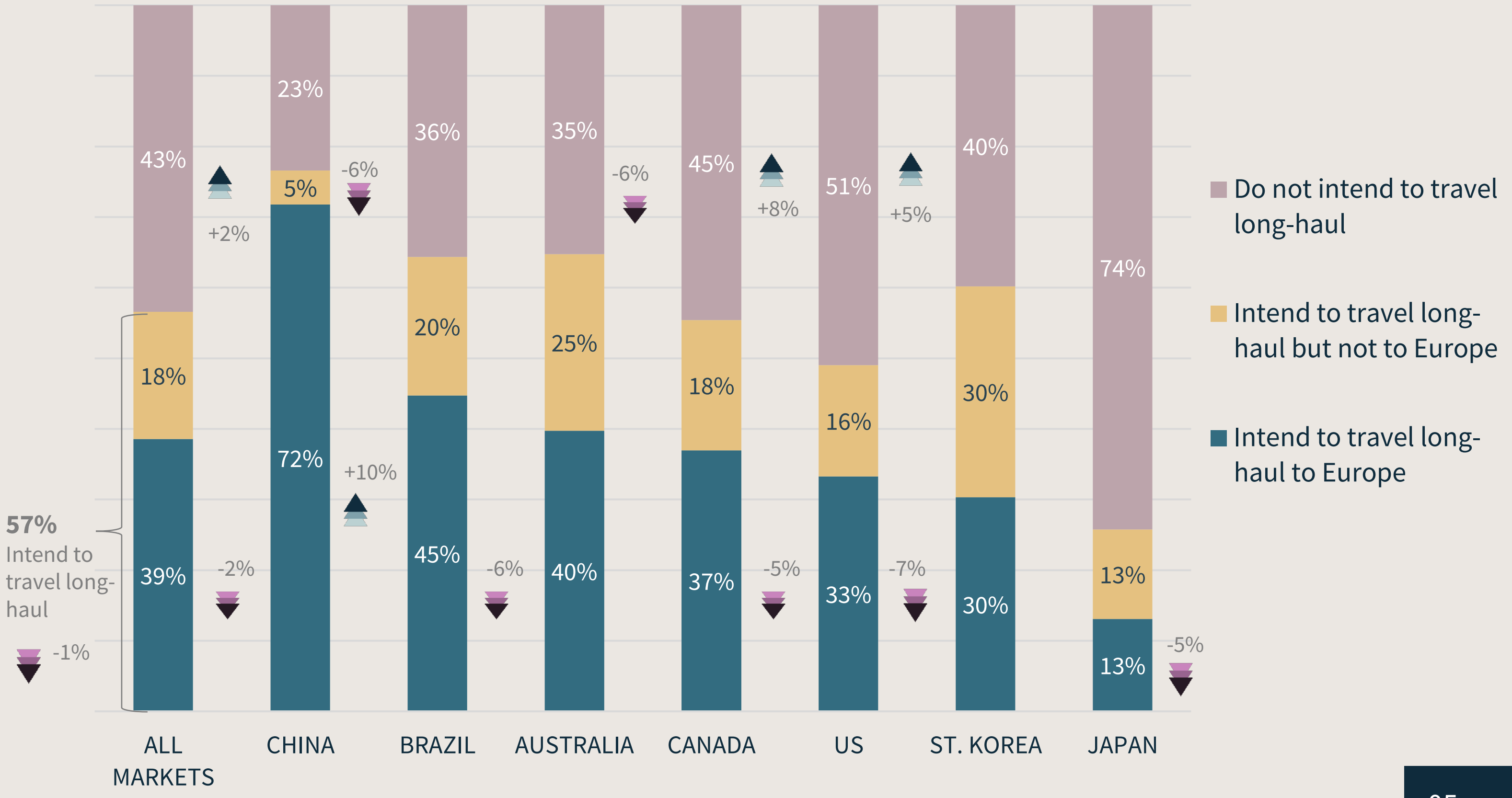
## Intentions for long-haul travel in summer 2025

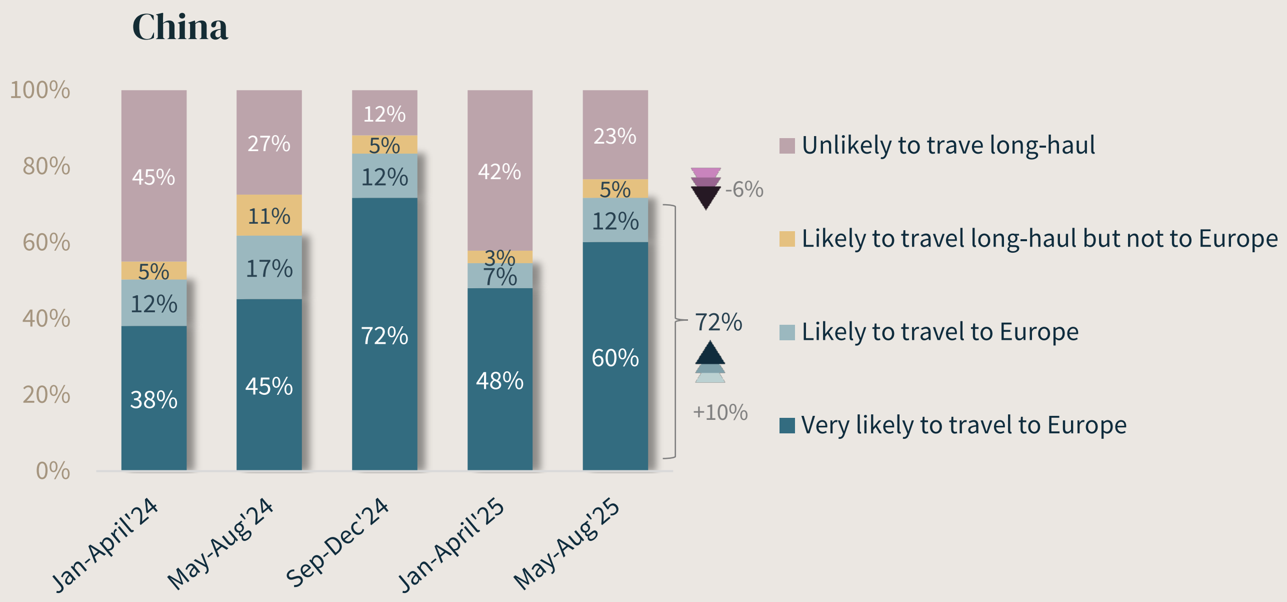
Horizon: May-August



# Evolution of travel intention to Europe in selected markets

### Europe gains ground in Chinese summer travel plans

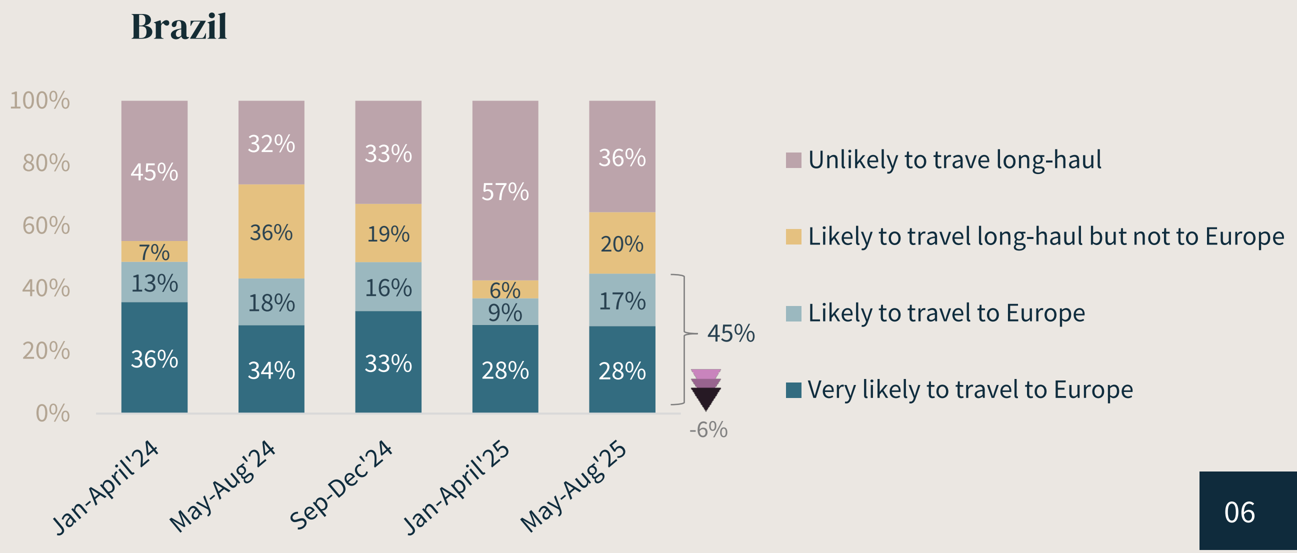
Chinese interest in Europe surges for the May–August period, with 72% of respondents planning to visit the region, a 10% increase over last summer. The strong sentiment is supported by growing disposable incomes, favourable travel policies, and a consumer shift toward prioritising personal fulfilment and lifestyle experiences such as tourism. In addition, the May Day holiday (1–5 May 2025), falling within the analysed period, may have alleviated concerns over limited vacation time and allowed more Chinese travellers to consider long-haul trips.




### Cost concerns dampen Brazil's interest in European travel

Brazilian interest in travel to Europe is down 6% from last year. Nevertheless, 45% of respondents still plan to visit the region in the coming months. The strongest enthusiasm continues to be seen among younger travellers aged 18–24 and those in the higher income brackets.

Overall, consumer confidence in Brazil remains subdued so far in 2025, despite recent improvements. Ongoing economic pressures, particularly high inflation and interest rates, continue to strain household budgets, especially for lower-income groups. These financial constraints significantly impact travel behaviour: among Brazilians not planning any long-haul journeys in the coming months, 65% cite high travel costs as the primary barrier.




*Respondents are asked to use a slider ranging from 1 to 100 (1 - definitely not, 100 - definitely yes) to express their intention to travel to Europe in the next four months. The category 'very likely' comprises the share of people who place the slider between 70 and 100, indicating a high level of confidence in their travel plans.*

# Evolution of travel intention to Europe in selected markets

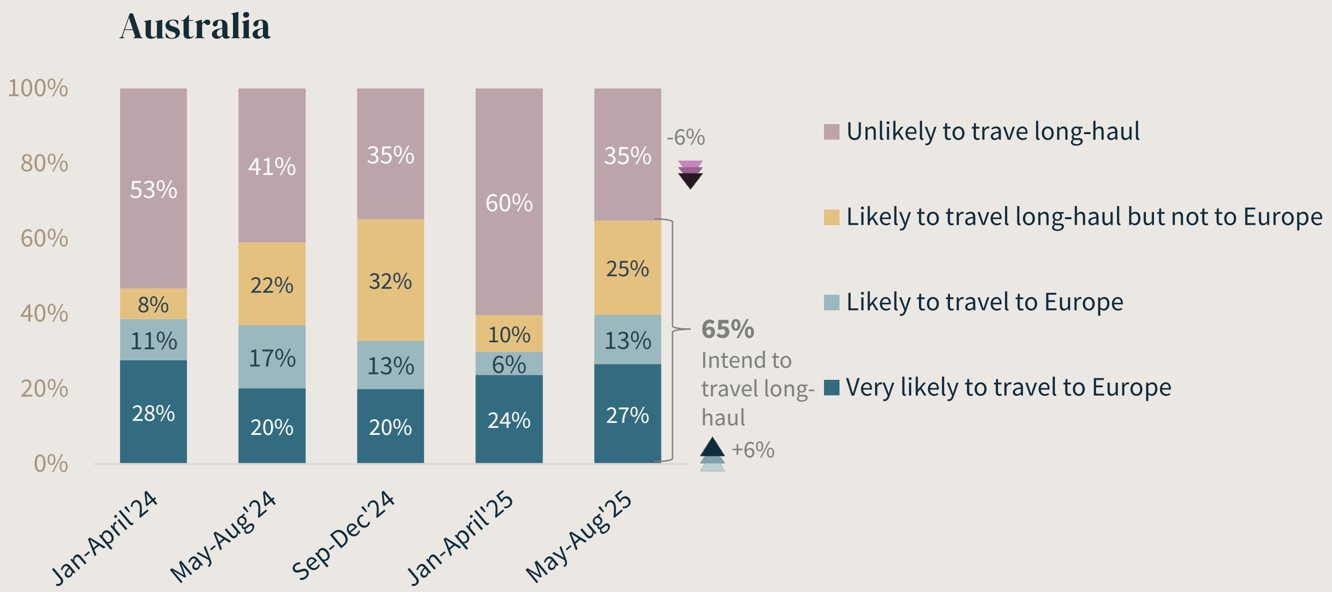
## Australians open to long-haul travel

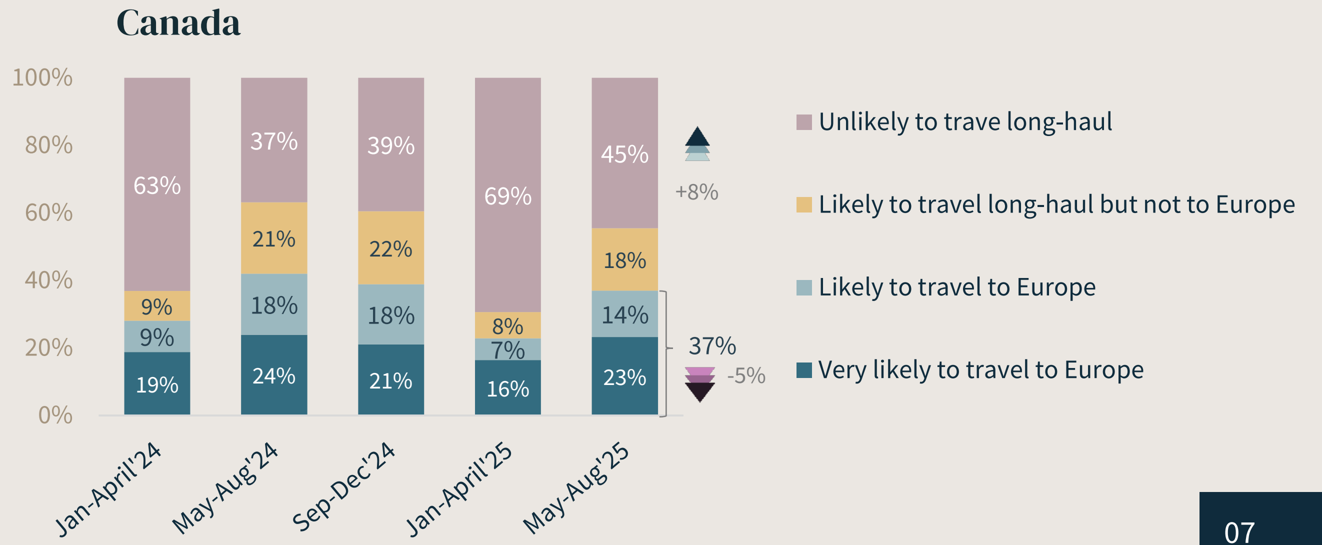
Despite concerns around international trade tensions, cost-of-living pressures, and unstable consumer confidence, Australia is one of the two overseas markets (alongside China) showing increased interest in long-haul travel this summer, rising from 59% in 2024 to 65% now. This growing momentum is also reflected in the intentions to visit Europe, which have climbed up to 40% (+3%) from last year.

Although modest, this upward trend aligns with the ETC's latest Quarterly Report, which highlights Australia as the sole long-haul market with year-on-year growth in either tourist arrivals or nights across all reporting European destinations in Q1/2025.

## Canadian travel sentiment to Europe rebounds slightly after early 2025 dip but remains below summer 2024 levels

Geopolitical developments, particularly rising tensions between Canada and the US, are having a notable impact on Canadians' travel intentions so far in 2025. Following a significant dip in long-haul travel sentiment earlier in the year, interest in overseas travel among Canadians is recovering ahead of the summer season, though it remains relatively restrained. Currently, 37% of Canadian respondents express a desire to visit Europe between May and August 2025, representing a 5% decline compared to the same period last year. At the same time, a growing share of Canadians (45%) are opting out of overseas journeys. The main reasons cited include high travel costs (45%), preference for domestic travel (16%), and concerns over geopolitical tensions (12%), with the latter increasingly shaping travel choices in this market.

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# Evolution of travel intention to Europe in selected markets

## US travel sentiment clouded by international friction

Long-haul travel sentiment in the US has improved slightly since the start of 2025, but it remains weaker compared to summer 2024. An increasing share of Americans (+5%) plan to skip overseas travel between May and August. High travel costs (54%) and plans for domestic holidays (16%) are the most cited barriers. Worries about being negatively perceived overseas under Trump's confrontational foreign policy may also be a key factor dampening travel sentiment.

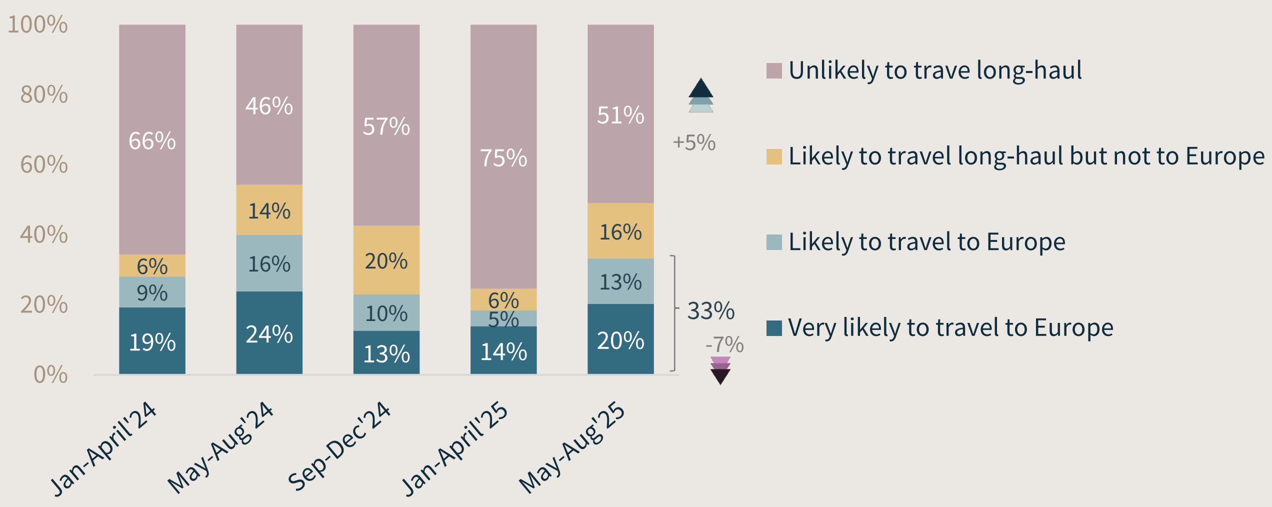
Among those planning to travel, a third (33%) intend to visit Europe, accounting for a 7% decline from last year. Travel sentiment is strongest among Americans from the Northeast (43% vs. 33% in the total sample), a region that typically leans Democratic and diverges politically from Trump. And while the US remains crucial for European tourism, the strained international relations and economic turbulence make the travel outlook hard to predict.

## Japan's outbound travel slump deepens

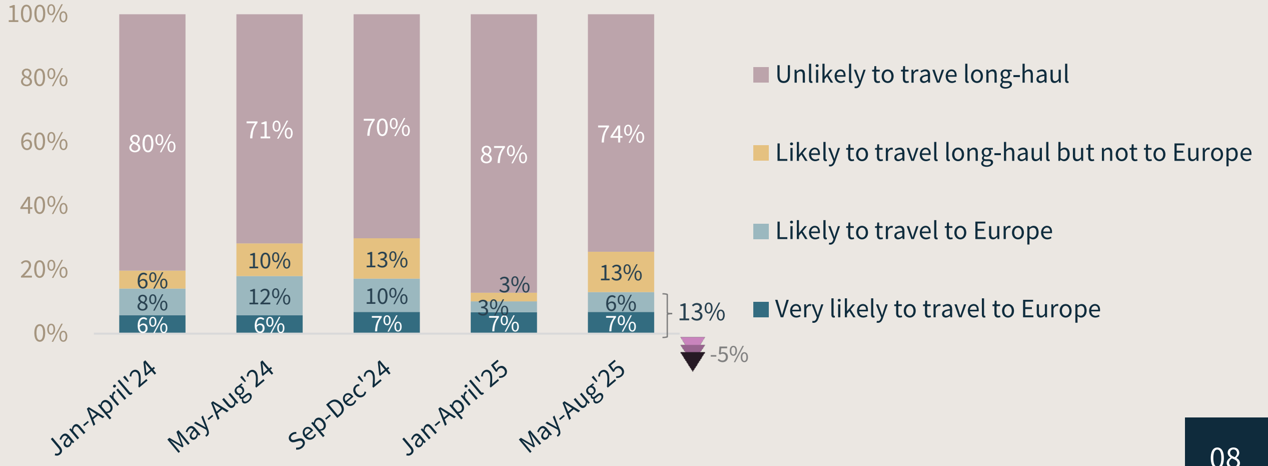
Reluctance to travel abroad remains high among Japanese travellers, primarily due to cost concerns (49%), a preference for domestic travel (22%), and limited vacation time (18%) - despite the country's economy showing signs of moderate recovery. This hesitancy is further reinforced by a weak yen and declining consumer confidence, which recently reached its lowest level in over two years, dampening discretionary spending on travel.

Between May and August 2025, the share of Japanese respondents not considering travel outside East Asia rose to 74% (up from 71% in 2024). At the same time, interest in visiting Europe declined to 13%, marking a 5% drop year-on-year.

## US




## Japan

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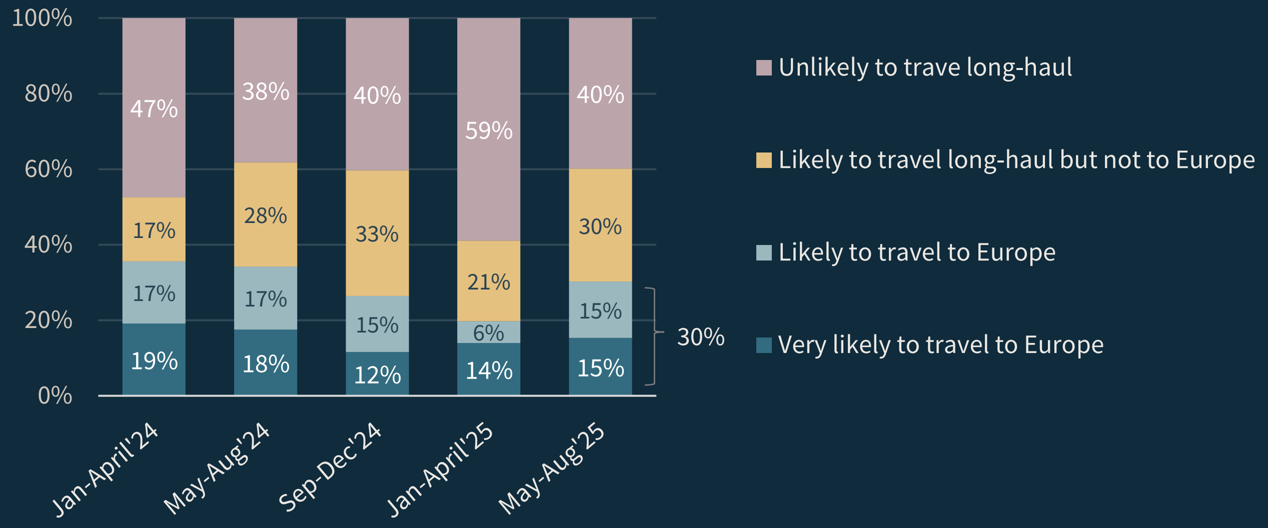
## South Koreans remain open to overseas travel in summer

60% of South Korean respondents plan to take an overseas trip between May and August 2025, similar to last summer's intentions. Of these, 30% are considering travel to Europe, while another 30% are looking at other long-haul destinations.

For those planning trips beyond Europe, the popular picks include the US (14%), New Zealand (11%), and Australia (9%). Within Europe, interest remains focused on established destinations, with France (35%), Spain (26%), and Italy (25%) leading the list.

### South Korea







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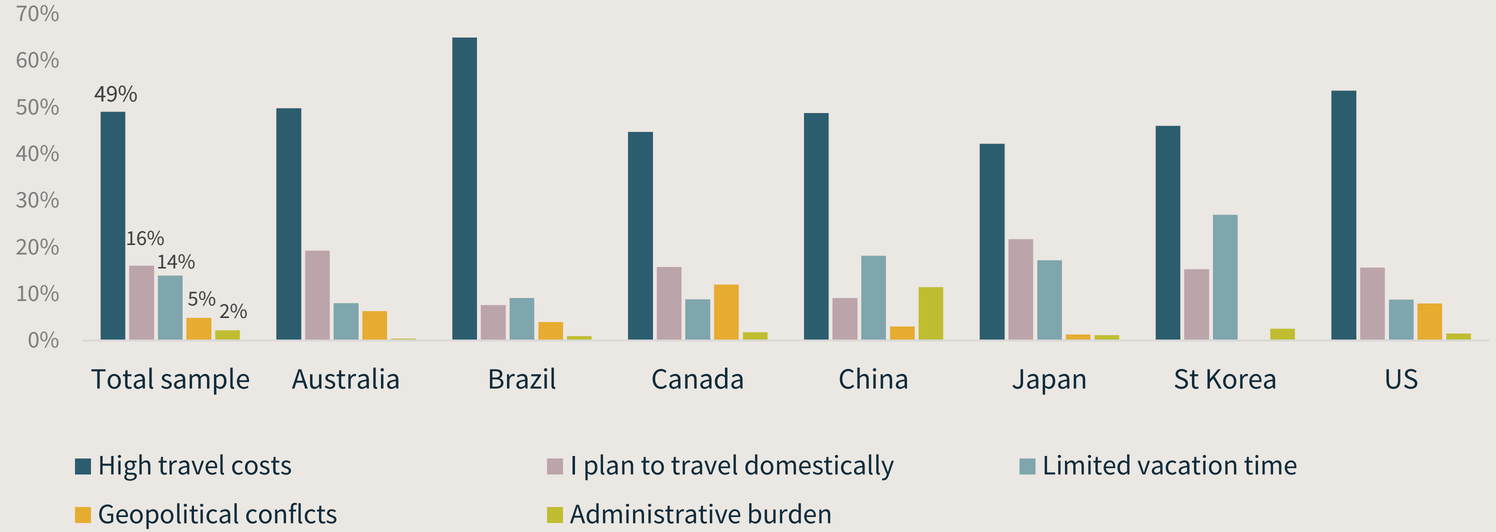
# High costs continue to curb long-haul travel intent

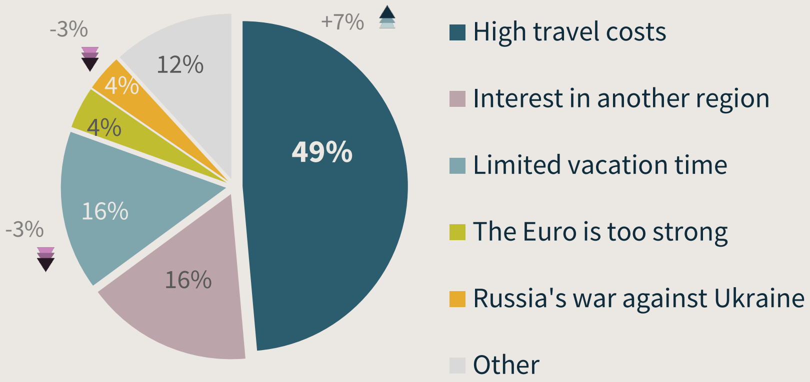
- Several barriers continue to discourage people from travelling overseas: The cost of travel tops the list, cited by around half of all respondents. This concern cuts across all age groups and regions but is especially pronounced among travellers under 50 and those from Brazil and the US, where economic uncertainty and cost sensitivity are more acute.
- In addition, one in five respondents cite plans for domestic travel as a reason for not pursuing long-haul trips in the coming months, a trend most common among senior travellers (over 50 years of age) and citizens in Japan and Australia. But it does not all finish with budget; limited vacation time also remains a major barrier, especially in South Korea, China, and Japan, where work culture and shorter holiday allowances often restrict opportunities for far-away trips.
- Focusing on **barriers to travel to Europe**, the perception of high costs is again at the top of the minds of 49% of respondents - a significant 7% increase from last summer. This shift may reflect growing perceptions of Europe as a premium-priced destination, especially given recent currency exchange trends and inflation. Travellers might also be reacting to higher accommodation and service prices in major European cities during peak season, further reinforcing the image of Europe as expensive. On a more reassuring note, concerns about the war in Ukraine have significantly declined. This summer, only 4% of respondents mentioned it as a barrier to travelling to Europe.

**Barriers to travelling long-haul in summer 2025***




*The sample comprises *respondents not planning to travel overseas in summer 2025.*
Comparison to 2024 is not available as the question was introduced later in Winter 2024/2025

**Barriers to travelling to Europe in summer 2025****

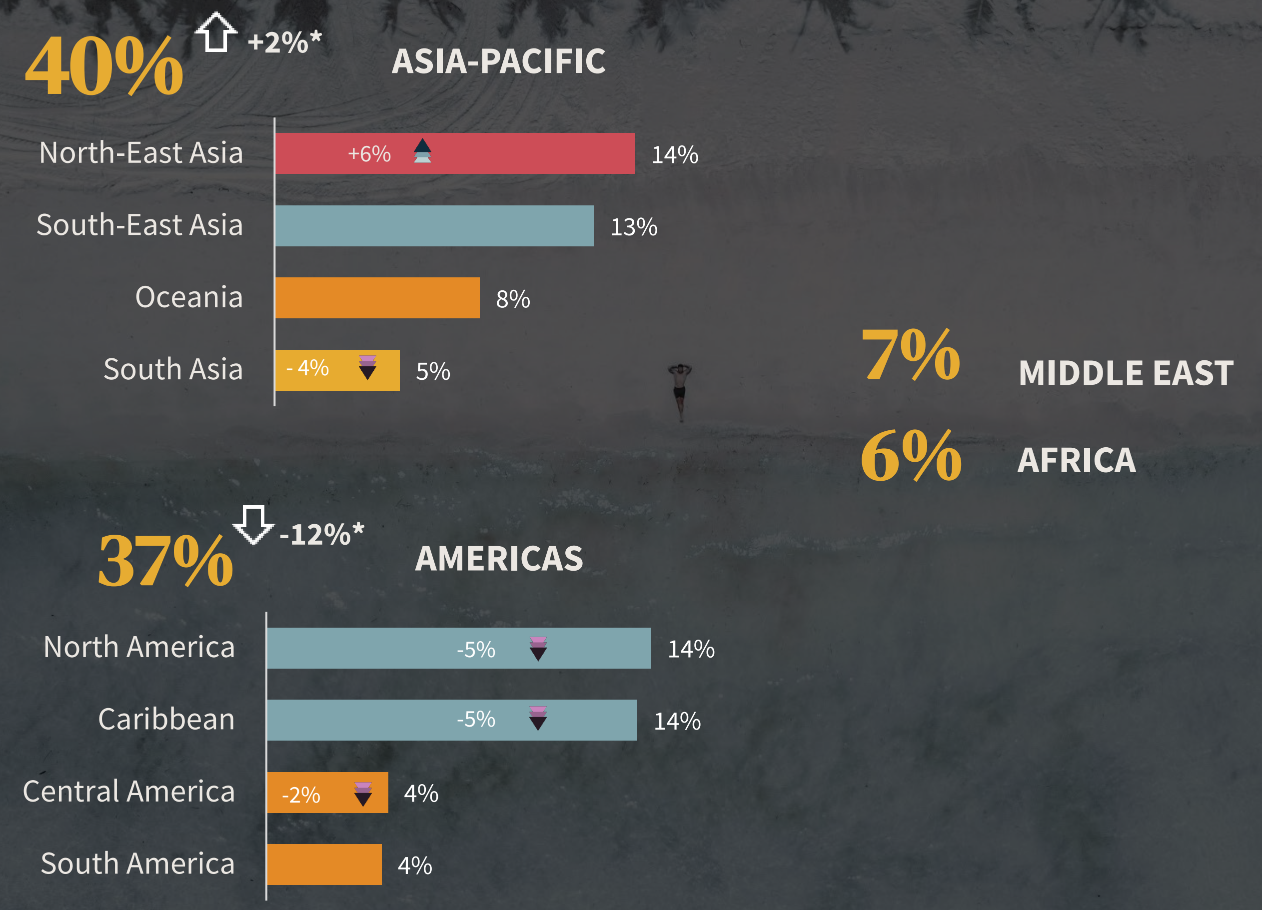



** The sample comprises ***respondents from all markets who intend to travel long-haul in summer 2025, but not to Europe***.

# If not Europe, where to?

## Preferred long-haul destinations for holidays in summer 2025

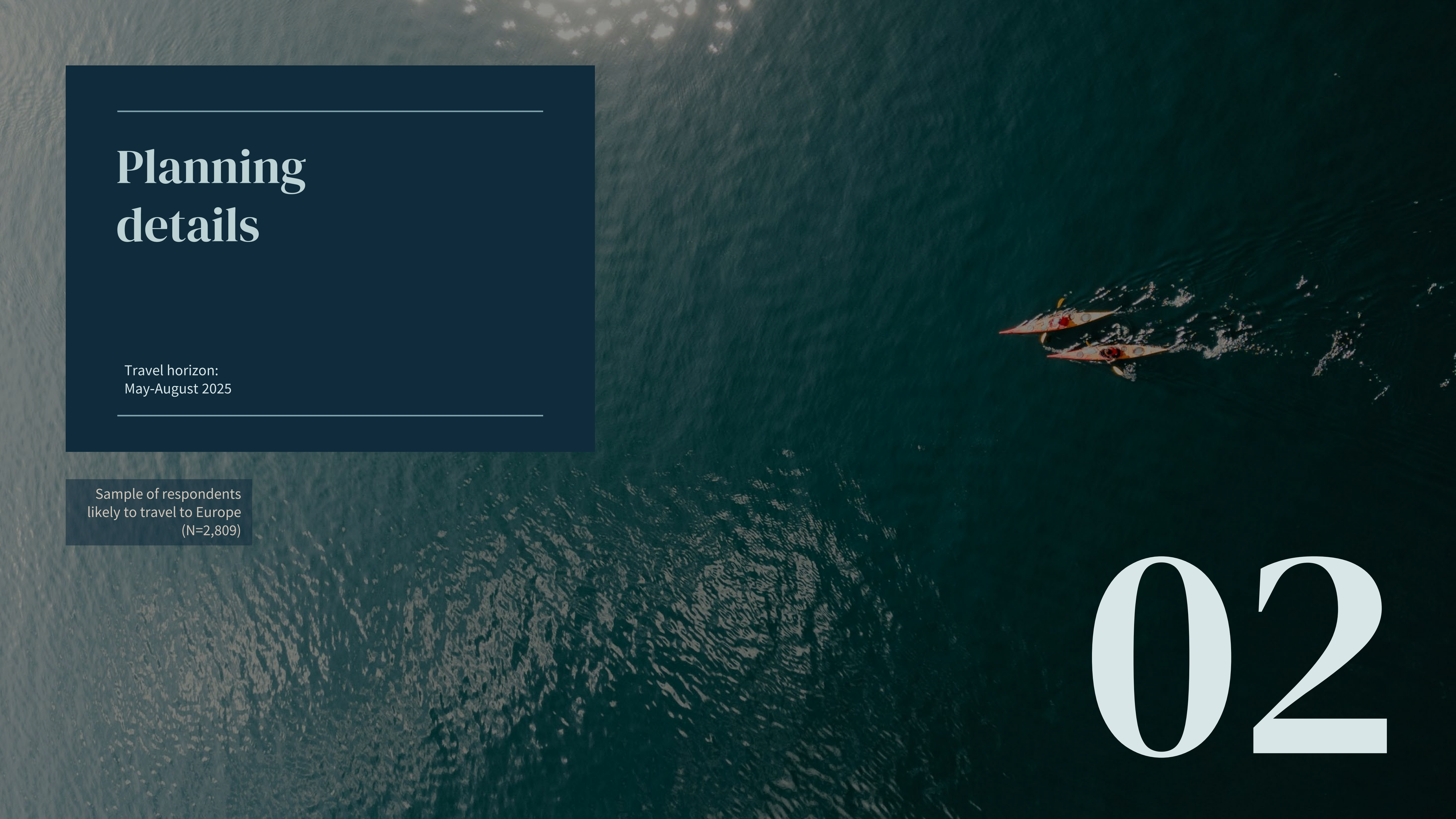
*Sample of respondents who intend to travel long-haul, but not to Europe.*




**Significant difference vs 2024*
*The remaining share of respondents have either not chosen or not disclosed their intended destination*

## Other world regions also see changes in travellers' interest

- 40% of respondents selected Asia-Pacific as the leading alternative to Europe this summer - a modest yet significant 2% increase compared to last year. Destinations in Northeast Asia showed the strongest growth in interest. The positive trend can be linked to improved air connectivity, competitive pricing, and growing regional cooperation in tourism.
- In contrast, the Americas, traditionally a top choice, has sharply declined, with traveller interest dropping by 12% year-on-year. This slump is particularly strong for North American and Caribbean destinations. Experts suggest it reflects a shift in perception, as international sentiment toward the US, in particular, becomes more cautious and politically influenced.
- Meanwhile, sentiment toward the Middle East and Africa remains comparatively stable but modest, with only 7% and 6% of respondents, respectively, naming these regions as top choices. While not seeing major shifts, these regions continue to face challenges related to geopolitical volatility and perceived safety, which may limit their broader appeal among long-haul travellers.



# Planning details

Travel horizon:
May-August 2025

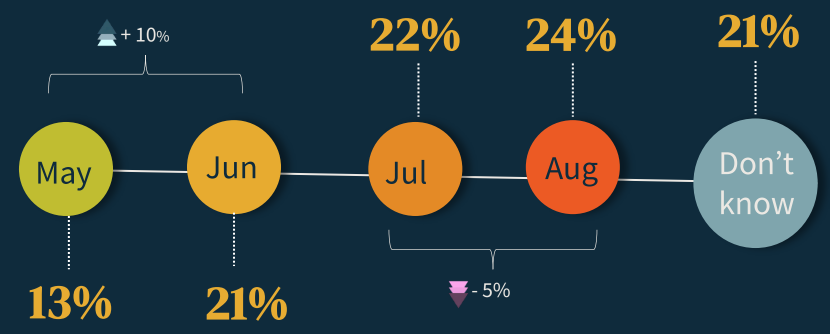
Sample of respondents likely to travel to Europe (N=2,809)

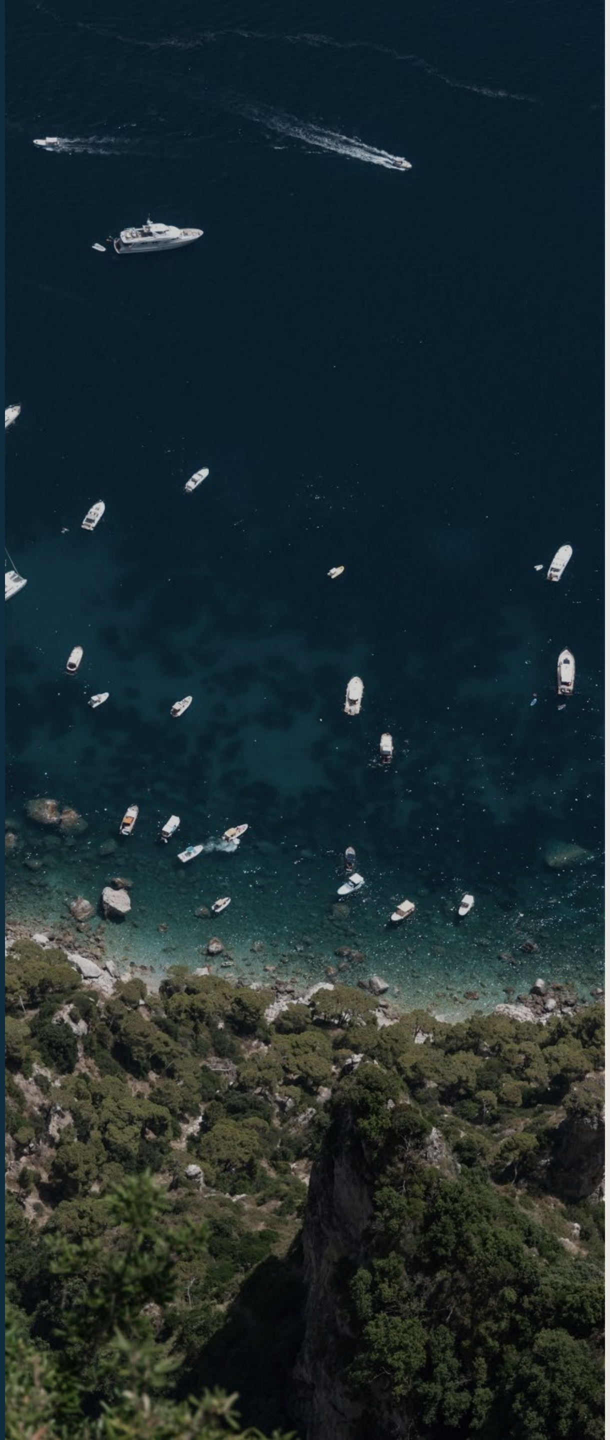
02

# Interest in earlier summer travel is on the rise

Prospective travellers show a growing interest in visiting Europe earlier this summer. While July and August remain the most popular months (46%), their dominance has softened by 5% from last year. Meanwhile, **interest in May and June travel has surged**, rising from 24% in 2024 to 34% now.

**Preferred travel month**



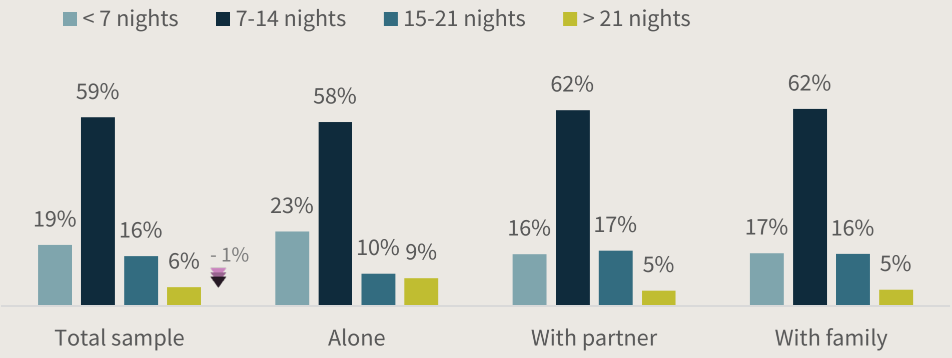



## One to two weeks remains the sweet spot for European holidays

While interest in earlier summer travel is on the rise, the expected length of stay remains broadly in line with past patterns**. The majority of travellers (59%) plan to spend 1–2 weeks in Europe**, while just 6% intend to stay longer than three weeks- a slight decline compared to summer 2024.

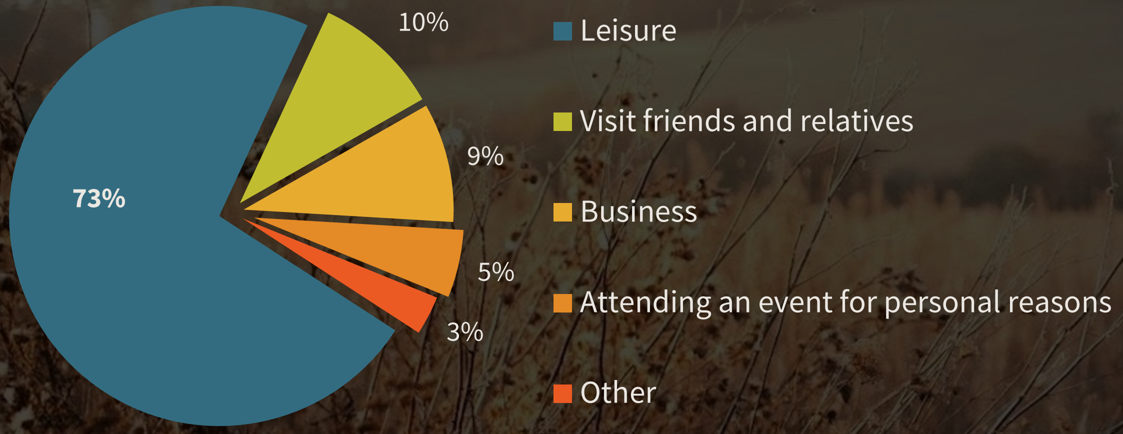
These trends hold true across different travel groups, though some nuances emerge: solo travellers, for instance, are more likely to opt for short getaways of under a week (23% vs. 19% overall), or to embark on extended stays over three weeks. Meanwhile, those travelling with a partner or family tend to favour the 2-3-week holidays more than the solo travellers.

**Intended length of stay per travel group**

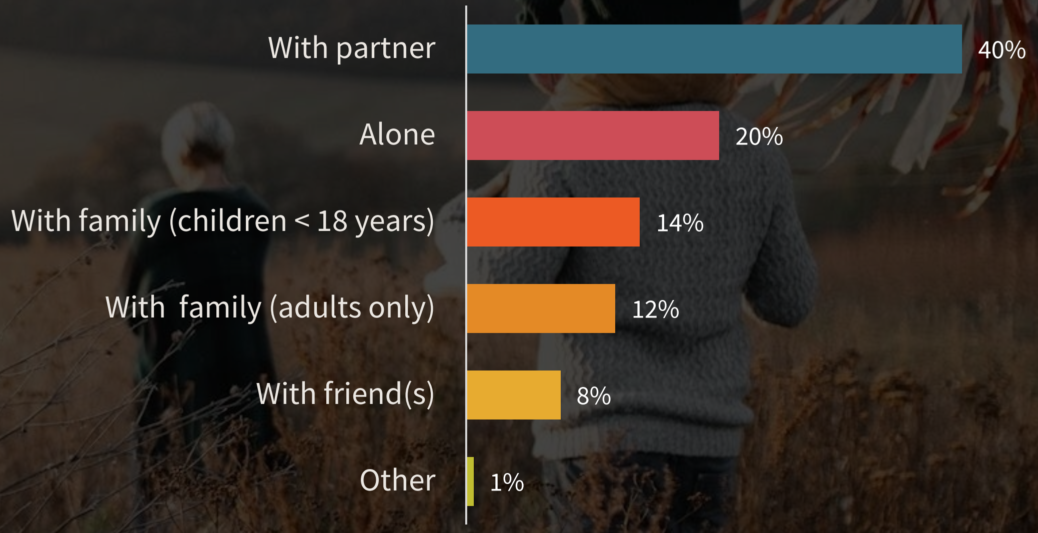


# Travelling for leisure with loved ones remains a top choice for those planning summer trips in Europe

**Purpose of travel**




**Travel party**




*Observations:*

- **Leisure** remains the dominant driver for travel to Europe this summer, cited by 73% of respondents, a stable trend across all travel party types, from solo adventurers to families and groups.
- **Visiting friends and relatives** is the next most common travel purpose, particularly among Australians (17%), Canadians and Brazilians (12%), and solo travellers(13%).
- **Business travel**, despite being a small share of total demand (9%), stands out among U.S. respondents (17%) and group travellers (25%), suggesting that work-related trips are more frequently planned in company, rather than alone.
- When it comes to travel party preferences, most respondents plan to travel to Europe with their **spouse or partner (40%).**
- **Family travel** follows closely, accounting for over a quarter of planned trips, with Australians (22%) and Brazilians (20%) the most likely to bring children along (vs 14% in the total sample).
- **Solo travel** ranks third at 20%, with a slightly higher share among Chinese travellers (23%). Meanwhile, travelling with friends is especially popular among Japanese (17%) and South Korean (15%) respondents.

# Most popular ways to book travel to Europe

**Couples and families favour convenience through packages, while solo travellers lean more toward flexibility and independence**

*Per travel party:*

**43%** — **Full package from a tour operator** (flights, accommodation, food excursions, entrance fees, etc.)

**Full packages** are the top choice across all travel groups. Those travelling with a **spouse are most likely (49%) to choose this option** compared to families (40%) and solo travellers (39%)

**36%** — **Separate bookings** of different travel aspects (flights, accommodation, excursions, events, etc.) **from various providers**.

**Booking services separately** is more commonly chosen by solo travellers (39%), which ties in with earlier findings that solo travellers are more likely to visit friends or relatives.

**35%** — **Partial package from a tour operator** (only flight tickets, flight tickets and accommodation only, etc.)

**Partial packages** are most popular among those **travelling with a partner** (41%) and **family travellers** (35%). In contrast, solo travellers show much less interest in this option (26%)

*Multiple answer question*

# What matters when choosing a holiday destination?

**Destination selection criteria**


## Leisure travellers prioritise landmarks, people travelling for business prioritise access

Safety remains the top priority for long-haul travellers planning a European trip. But beyond safety, travellers are increasingly (+5%) motivated to visit destinations home to Europe’s iconic landmarks. In fact, famous sights have now surpassed tourism infrastructure as a key factor in destination choice. Stable weather also plays a notable role in the choice of destination, cited by around a third of respondents, a reminder of how climate and seasonality continue to shape travel plans. Interestingly, concerns that were more prominent last summer, including costs at the destination, crowd levels, and proximity to the war in Ukraine, have declined in importance by 4%, suggesting a more confident and less risk-averse outlook among travellers in 2025.

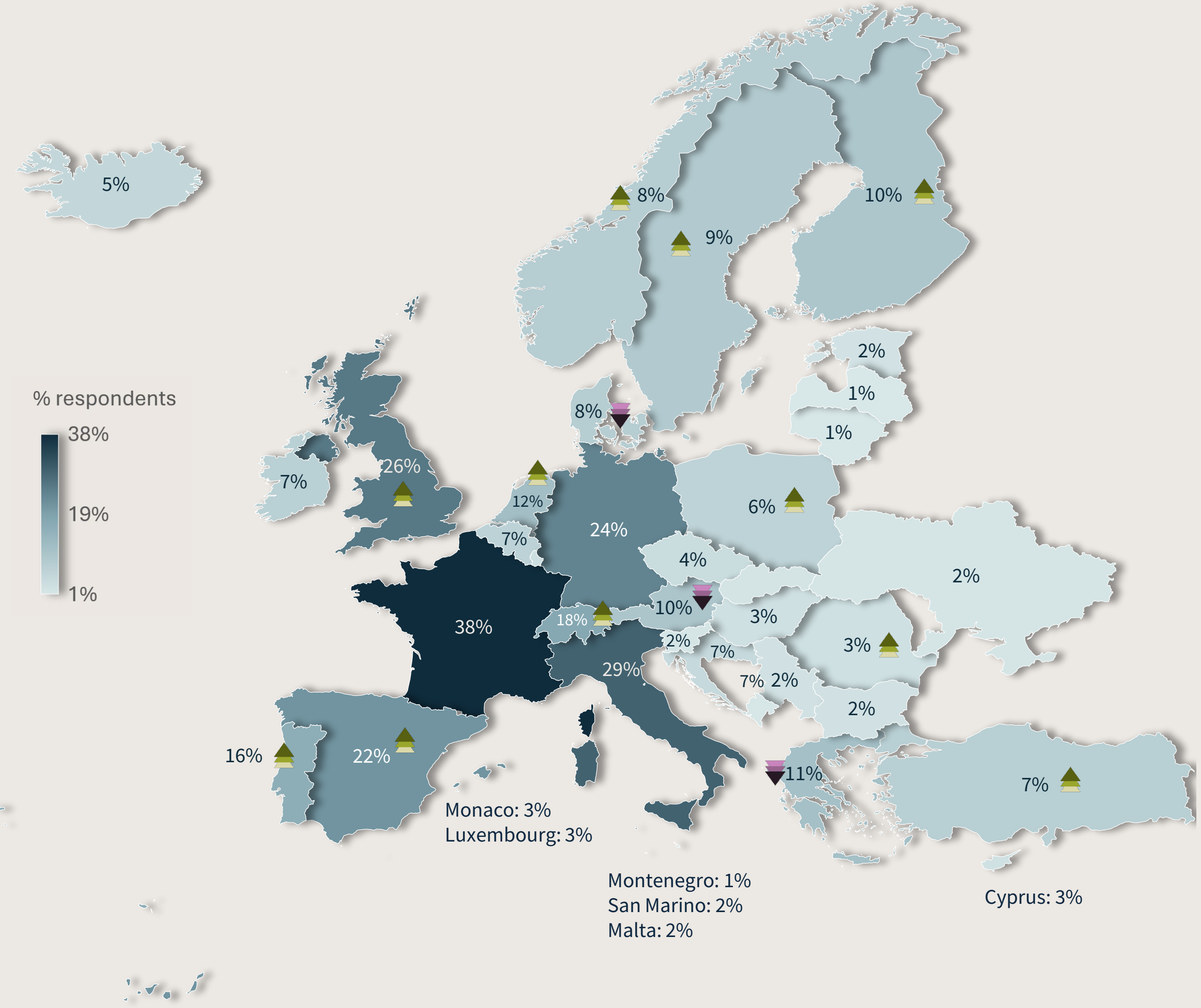
However, selecting a destination varies significantly depending on why people are travelling. While landmark attractions and heritage preservation resonate most with leisure travellers (45%), they carry far less weight for business travellers (34%) or those visiting friends and relatives (28%). For these segments, convenience factors come to the forefront, such as direct flight access and strong rail connectivity. Business travellers, in particular, place minimal importance on crowd levels (9%) and cultural preservation, instead favouring efficient, well-connected destinations. Similarly, travellers coming for events or visiting friends/family tend to focus more on accessibility and logistics than sightseeing or cultural immersion.*



**The detailed results are available to ETC members and project partners*

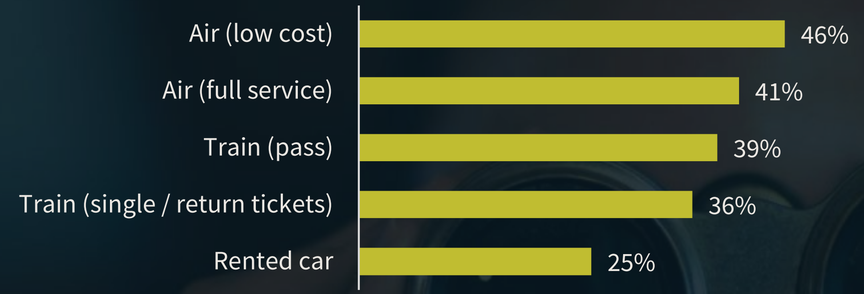
# Where to?

## Preferred European destinations for holidays in summer 2025

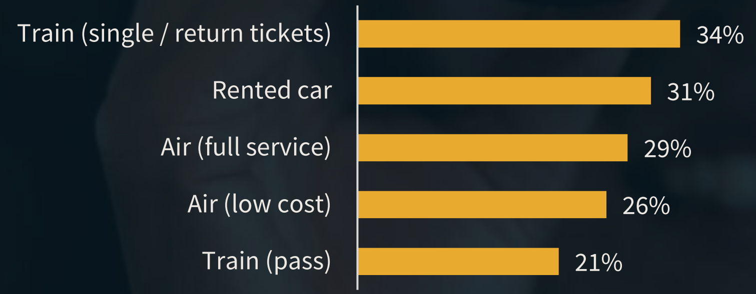



## Modal choices reflect travel scale: Air across borders, rail within countries

### Top transport services for cross-border travel



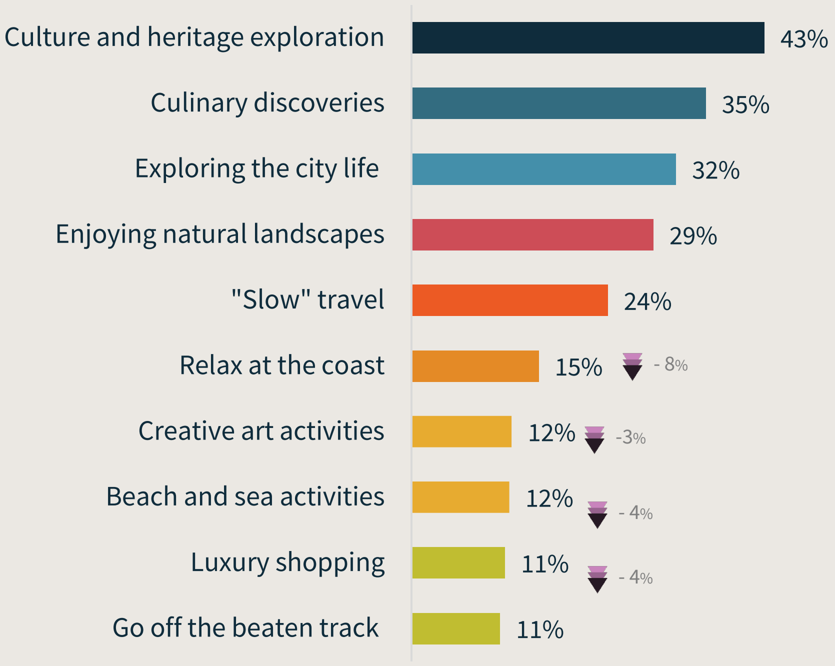

### Top transport services to travel within a single country




*Significantly **more** ▲ **less** ▼ respondents plan to visit this country compared to a year ago (May-August 2024)*

# Culture, food, and urban energy drive overseas travellers' interest in Europe

**Most wanted activity types to try in Europe in summer 2025**




## Type of attractions topping travellers' wishlists

**44%** UNESCO sites, historical buildings, modern architecture, and unique design structures

**41%** National parks, mountains and lakes

Urban attractions like city squares and famous shopping streets

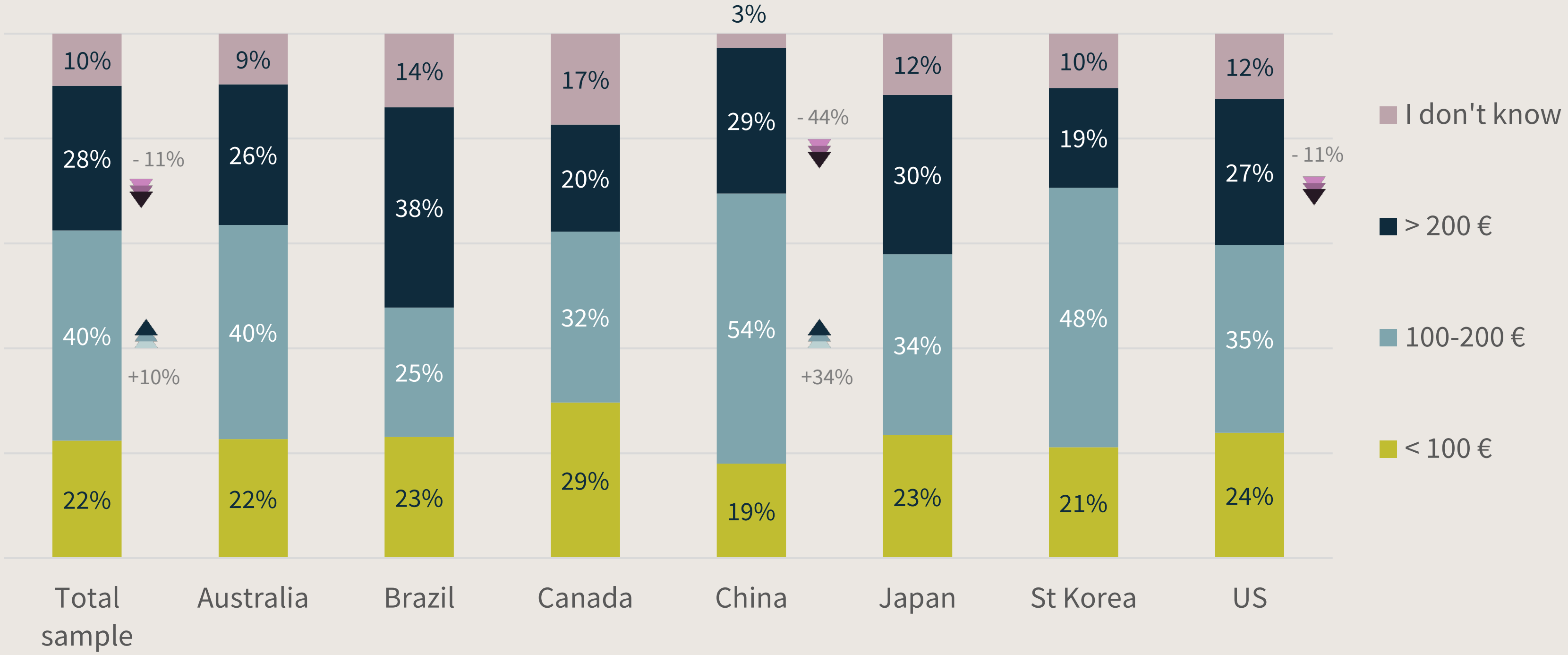
**34%** Gastronomy and culinary venues like food markets and wineries

**33%** Art and history museums, national galleries and historical exhibitions

# Summer 2025 is shaping up to be more budget-conscious than last year

While Europe remains the top destination in many travellers' minds, a broader recalibration of spending expectations is underway. Rising travel costs, inflation, and currency fluctuations are increasingly squeezing spending power, prompting many travellers across the globe to reassess their budget plans.

## Intended daily budget




- Against this backdrop and the growing price sensitivity, the share of respondents planning to spend more than €200 per day has fallen by 11% over the same period last year. The downturn in higher daily budgets is especially strong among Chinese and US respondents. Simultaneously, a larger share (40%) of respondents now expect to spend between €100–€200 per day during their next European trip, a 10% increase compared to summer 2024.
- Budget expectations also differ depending on the purpose of travel. Business travellers remain the highest spenders, with 36% expecting to spend more than €200 per day, notably higher than the 28% average across other segments. This likely reflects employer-covered costs, preferences for premium accommodation, and the tendency for business trips to be shorter but more concentrated in activity and value. By contrast, those visiting friends or relatives expect to spend less, with just 18% anticipating a daily spend above €200.

*Expenditure is per person and includes accommodation, food and other activities - excluding flight tickets to Europe*

# From dining to transport:
## What travellers plan to spend on in Europe this summer?

**Dining** is the leading spending category chosen by 65% of respondents and prioritised especially by Canadians (77%) and Japanese (76%). In contrast, travellers from China and the US are less likely to spend heavily on food.

**Tourist activities** come second, widely valued across markets  (49%) except in South Korea (28%), where travellers prioritise transport, shopping, and accommodation.

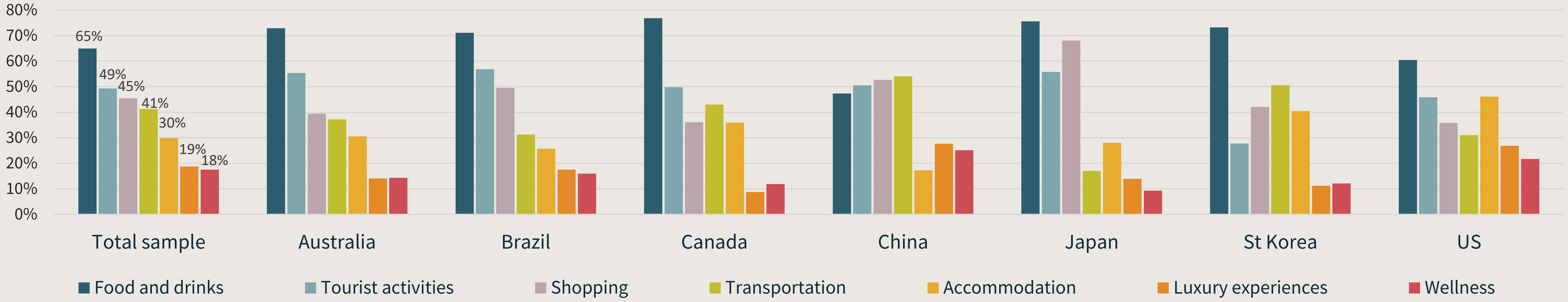
**Shopping** ranks third, with strong interest from Japanese (68%) and Chinese (53%) travellers, while it plays a smaller role for those from the US, Canada, and Australia.

**Transport** is another key budget item, particularly for Chinese (54%) and South Korean (51%) respondents, confirming their known interest in multi-destination travel.

**Accommodation** rounds out the top five, with notable variation: 46% of Americans plan to invest heavily in lodging, compared to just 17% of Chinese travellers.

While **luxury and wellness** are niche spending areas overall, they remain important for Chinese and US travellers, indicating continued demand for premium and wellness-focused experiences in these markets.

**Which of the following categories do you expect to spend the most on during your next trip to Europe?**



**Long-Haul Travel Barometer 2/2025**



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