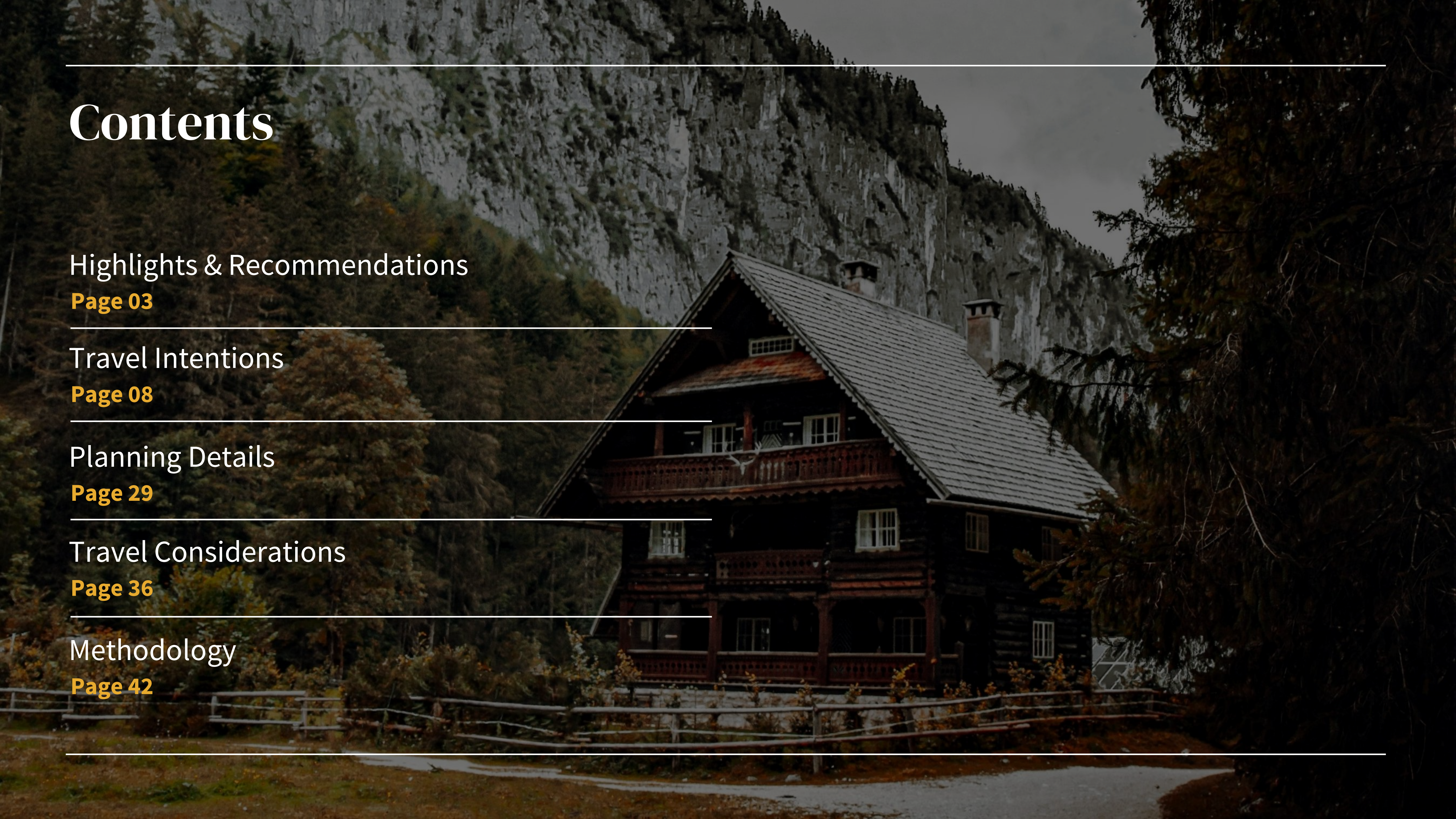
Monitoring Sentiment for Intra-European Travel

Autumn 2025 & Winter 2026

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION



Contents

Research highlights

WAVE 23

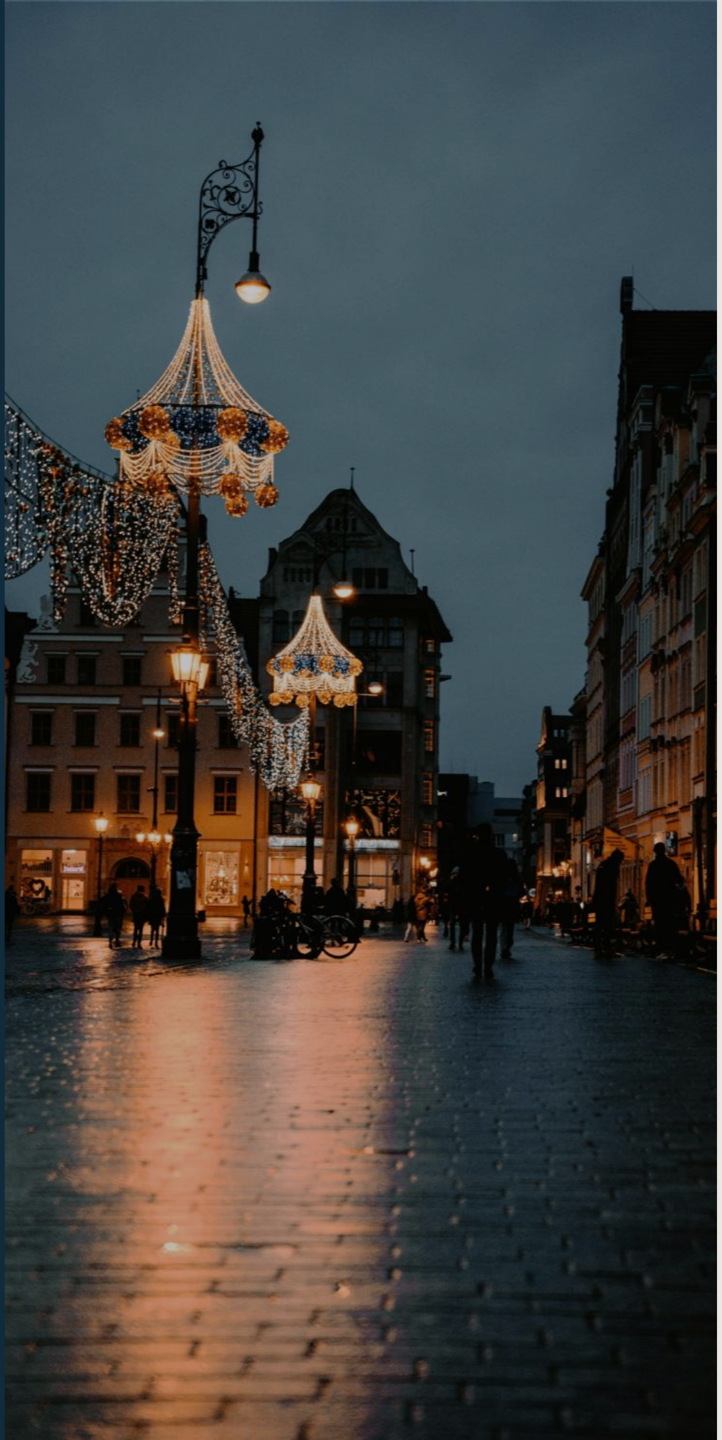
This report monitors intentions and short-term plans for domestic and intra-European travel.

This report is the 23rd update since the series began in September 2020.

The findings are based on data collected in September 2025 from respondents in 10 key European markets.

It focuses on their travel plans between October 2025 and March 2026.

EUROPEAN TRAVEL COMMISSION



TRAVEL INTENTIONS

- Europeans' travel sentiment remains strong, with **73%** planning to travel this autumn and winter. Travellers aged **45–54 are the most eager to travel** (76%, +3%), while travel sentiment among Europeans aged 18–24 (60%) has significantly declined (–4%).
- Europeans' travel interest peaks in **October** (24%) and **December** (23%) 2025, mirroring last year's trend, with **intra-European trips preferred by 64% of travellers** (+3%).
- For 52% of travellers, **Southern Europe and the Mediterranean have risen as the preferred destinations** (+7%), while interest in Eastern Europe has slumped to 4% (–6%).
- Half of Europeans plan to visit **major tourist destinations**, while the rest seek less popular or off-the-beaten-path locations.
- Travel motivations are holding steady, with **leisure trips accounting for 71% of plans**, followed by visiting friends and relatives (16%) and business travel (7%).
- As autumn arrives, **City Breaks once again rank as Europeans' most preferred type of trip** (20%), while Sun & Beach holidays surge (19%, +5%), with travellers chasing the last rays of sun.

Comparisons vs a year ago (October 2024)

Research highlights

WAVE 23

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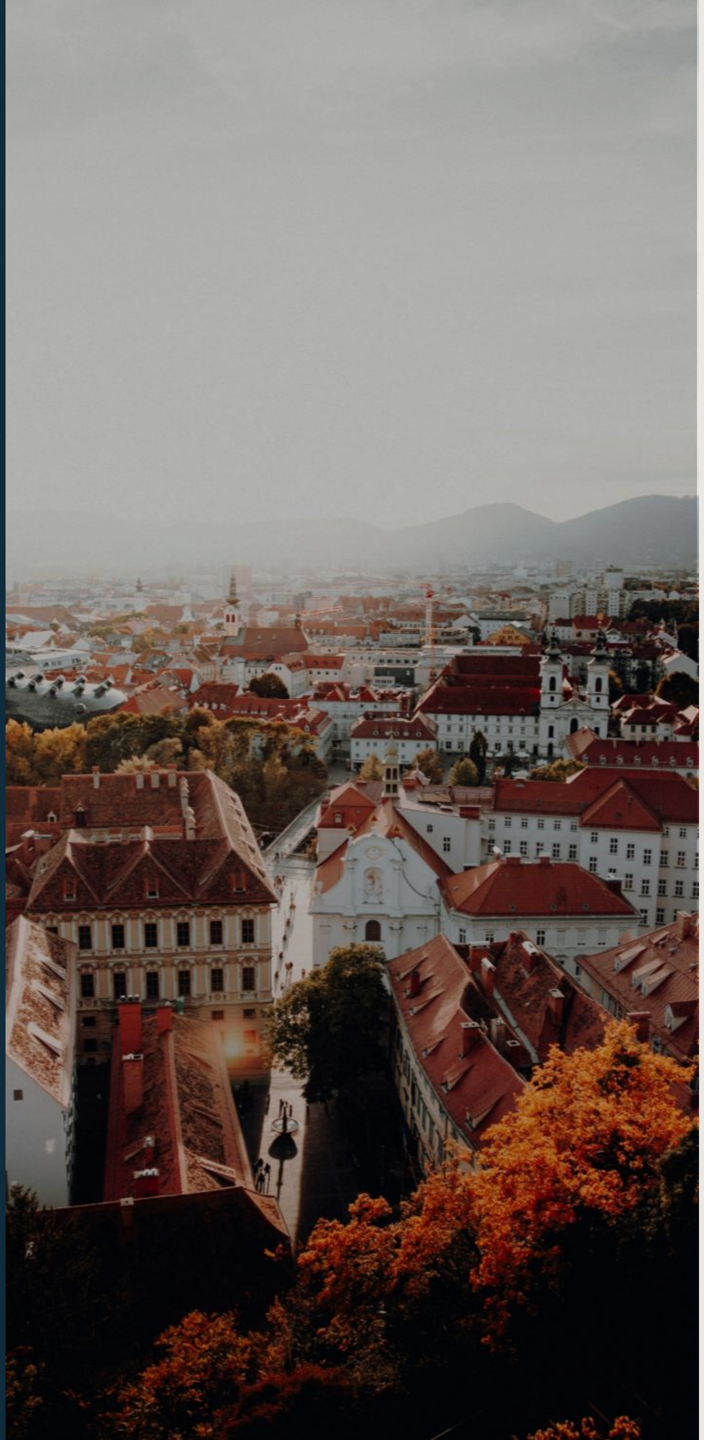


TRIP PLANNING

- **More Europeans are planning a single trip for the coming autumn and winter (45%, +7%)**, while plans to take multiple trips have declined (50%, –6%).
- **Trips of 4–6 nights remain the top choice** for 43% of Europeans, whereas **the share of travellers planning to spend over €1,500 has decreased** (35%, –4%).
- Europeans' demand for **air travel has risen to 57%** (+4%), while train journeys remain stable at 13%.

TRAVEL CONCERNS AND CONSIDERATIONS

- Travellers' destination choice criteria remain steady, with **safety** (20%), **pleasant weather** (15%, +3%), and **attractive deals** (13%) topping the list. In contrast, **rising travel costs** (21%) and the **personal financial situation** (16%) are Europeans' leading concerns, followed by the Russia–Ukraine war (14%) and destination overcrowding (11%).
- Geopolitical tensions impact the travel choices of **89%** of Europeans.
- Over three in four Europeans (76%) adapt their travel behaviour to the climate crisis, mainly by choosing destinations with **milder temperatures** (16%) and **checking the weather before booking** (16%).

Comparisons vs a year ago (October 2024)

Recommendations for destinations

- The rise in travel intentions for Southern Europe and Mediterranean destinations this autumn and winter offers an opportunity to extend the season and **ease summer pressure**. Destinations should capitalise on this trend by promoting **off-peak experiences**, diversifying products beyond the summer offer, and engaging local communities to ensure benefits are shared year-round.
- Half of Europeans intend to visit quieter, less popular places. To spread tourism benefits more evenly, these locations should be **strategically promoted** for their genuine charm, friendly locals, smaller crowds, and better prices compared to top tourist spots.
- As demand for air travel soars, cutting flight emissions relies on **promoting train travel**. This can be done by improving regional links, connecting trains with flights, offering train-and-hotel deals, and providing incentives for visitors who travel by train.
- Geopolitical tensions influence the travel choices of 89% of Europeans, and incidents such as drone disruptions can undermine safety and confidence. To protect their image and reassure visitors, destinations should **adopt proactive crisis communication** with clear response plans, trained spokespeople, and unified messaging across airports, airlines, and tourism partners.

WAVE 23

Recommendations for businesses

- With family travel expected to peak in December, businesses, museums, and local attractions are encouraged to offer **family-friendly Christmas experiences and packages** – including themed guided tours, festive arts and crafts workshops for children, and discounted family tickets.
- As Europeans continue to seek Sun & Beach trips in cooler months, **coastal businesses should promote off-season value**, mild weather, and the opportunity to enjoy less crowded beaches and ensure they have the capacity to meet a potential increase in off-season demand.
- With two in five Europeans opting for less-popular destinations, local businesses can develop **authentic, experience-based products** – such as craftsmen tours, artisan workshops, or cooking classes featuring local flavours – to attract visitors seeking genuine encounters.
- Considering the moderate trip length and restrained spending intentions for this autumn and winter, businesses should adopt **pricing strategies and tailored packages** that incentivise longer stays and higher expenditure, helping to maximise visitor value amid shorter travel plans.
- Many Europeans check the weather before booking trips as a key method of adapting to climate change. To support this, businesses should offer **flexible booking**, **easy-to-use online systems** that let customers change dates or rebook, and provide **accurate real-time weather updates** to keep travellers informed.

WAVE 23

Reading the data

Data collection periods

Wave 23	6-26 September 2025
Wave 22	27 May-10 June 2025
Wave 21	3-17 March 2025
Wave 20	7-23 September 2024
Wave 19	25 May -7 June 2024

Analysed samples

- Total respondents: 5,963
- Respondents most likely to travel in the next six months: 4,332
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 4,646

Travel timings for Wave 23

In the context of this report, the travel periods are as follow:

In 1-2 months:	October-November 2025
In 3-4 months:	December 2025-January 2026
In 5-6 months:	February-March 2026

Significant changes

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

Increase Decrease

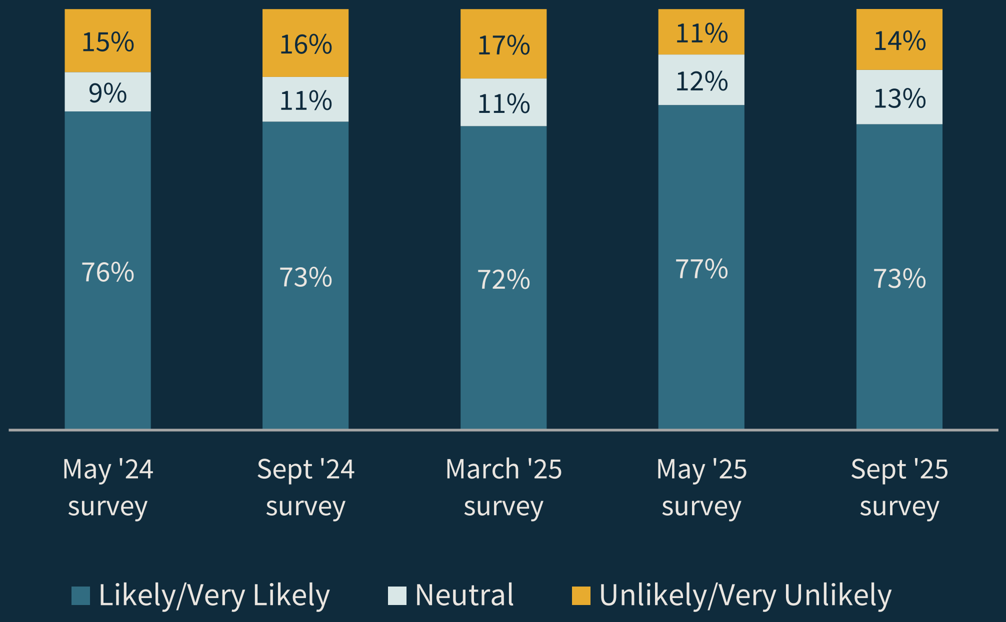
All data and insights refer to domestic and intra-European travel unless otherwise stated.

Travel intentions

01

Europeans' travel intentions remain strong, with 73% planning to travel this autumn and winter

Intention to travel in the next six months



Q5. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

Top three markets most likely to travel in the next six months

POLAND

82% 12%*

SPAIN

80% 4%*

UK

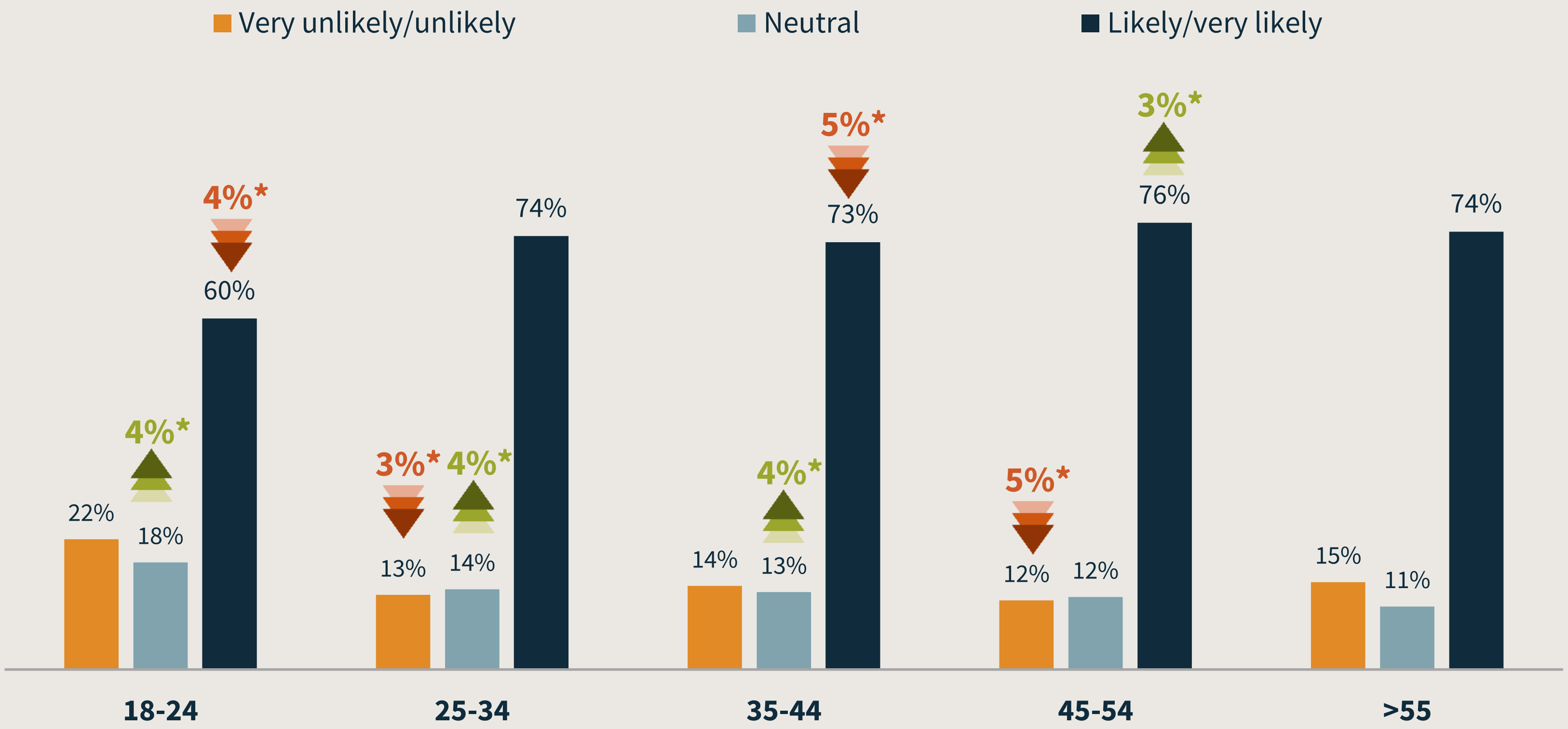
80% 4%*

* Statistically significant difference vs a year ago (October 2024)

No. of respondents: 5,963

Travel intentions rise among 45–54-year-olds (+3%) but decline among travellers aged 18–24 (–4%)

Intention to travel in the next six months by age group

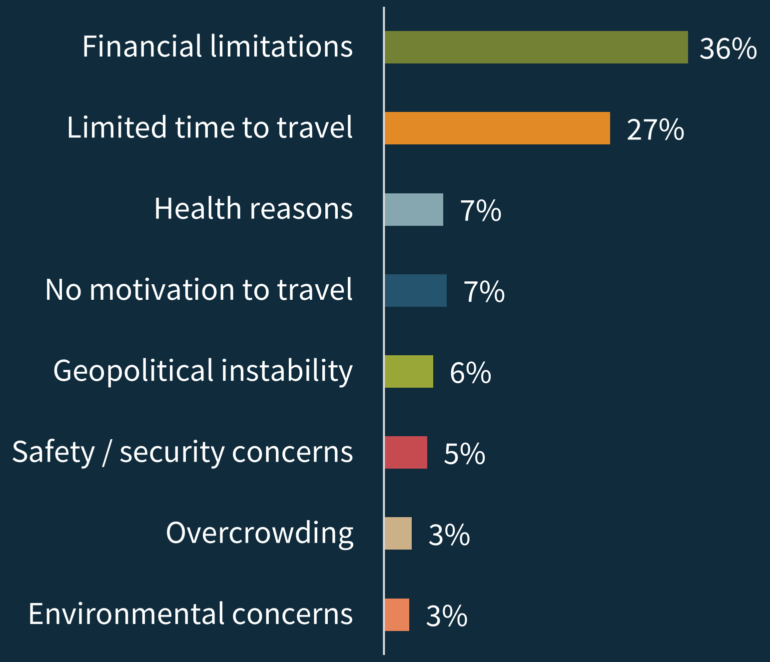


No. of respondents: 5,963

* Statistically significant difference vs a year ago (October 2024)

Q5. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

Key barriers to travel



Limited time is the main barrier for 37% of Europeans aged 18–24 who are not planning to travel, compared to just 16% of those over 54.

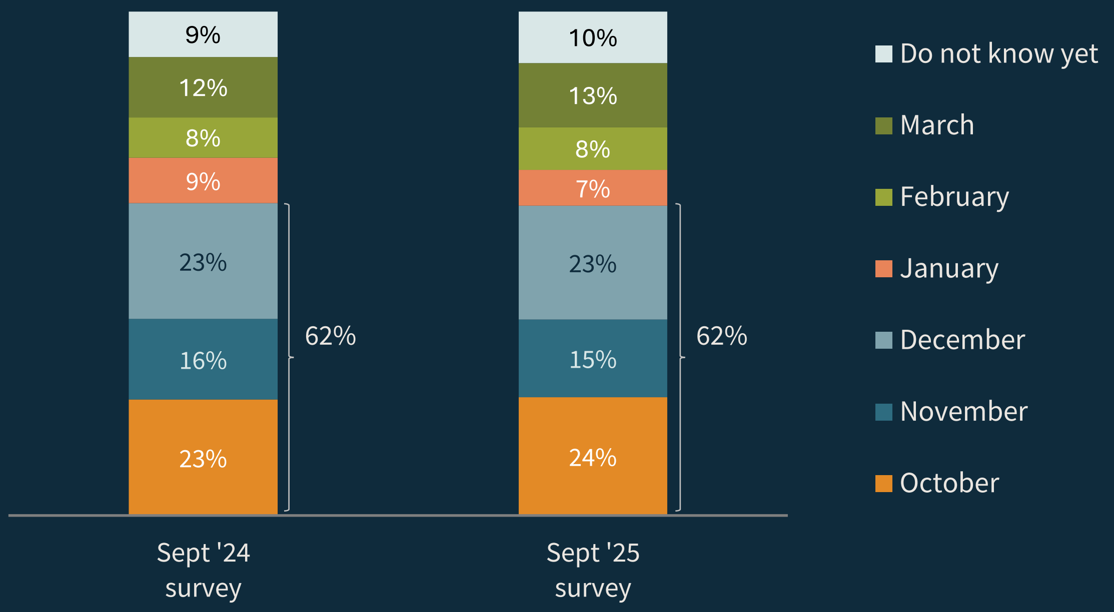
No. of respondents: 864

Q6. You mentioned that you will not travel in the next 6 months. What is the main reason behind this decision?

Europeans' travel interest peaks in October and December, mirroring last year's trend

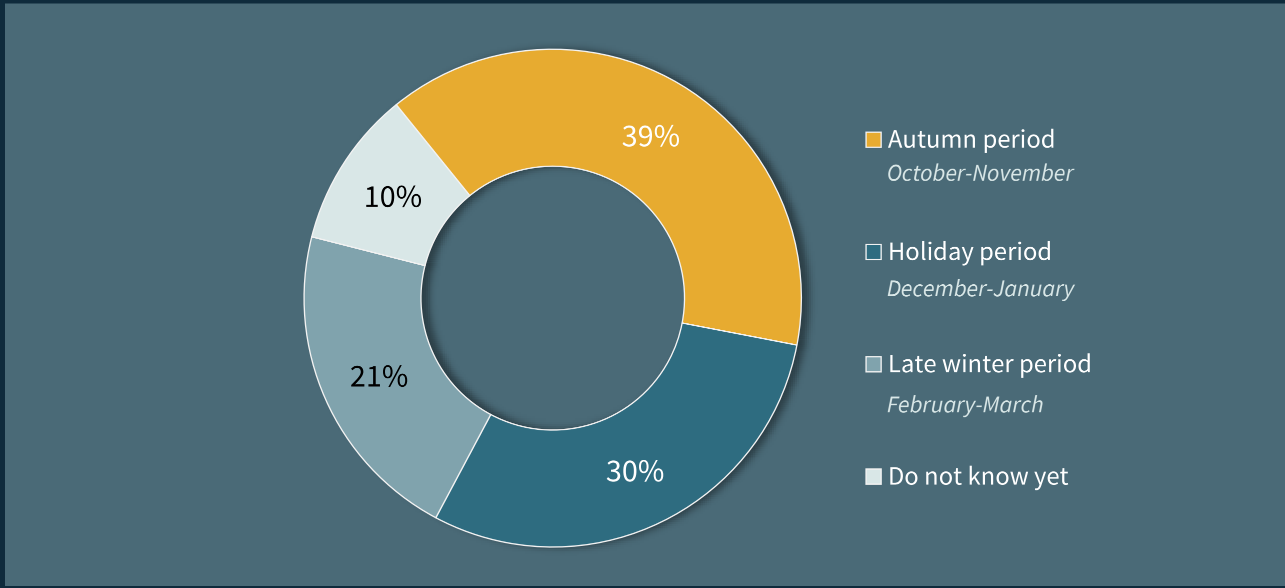
When will Europeans travel next?

Travel month



When will Europeans travel next?

Travel period



Family travel peaks around Christmas, accounting for 42% of all December trips compared to 34% in other months.

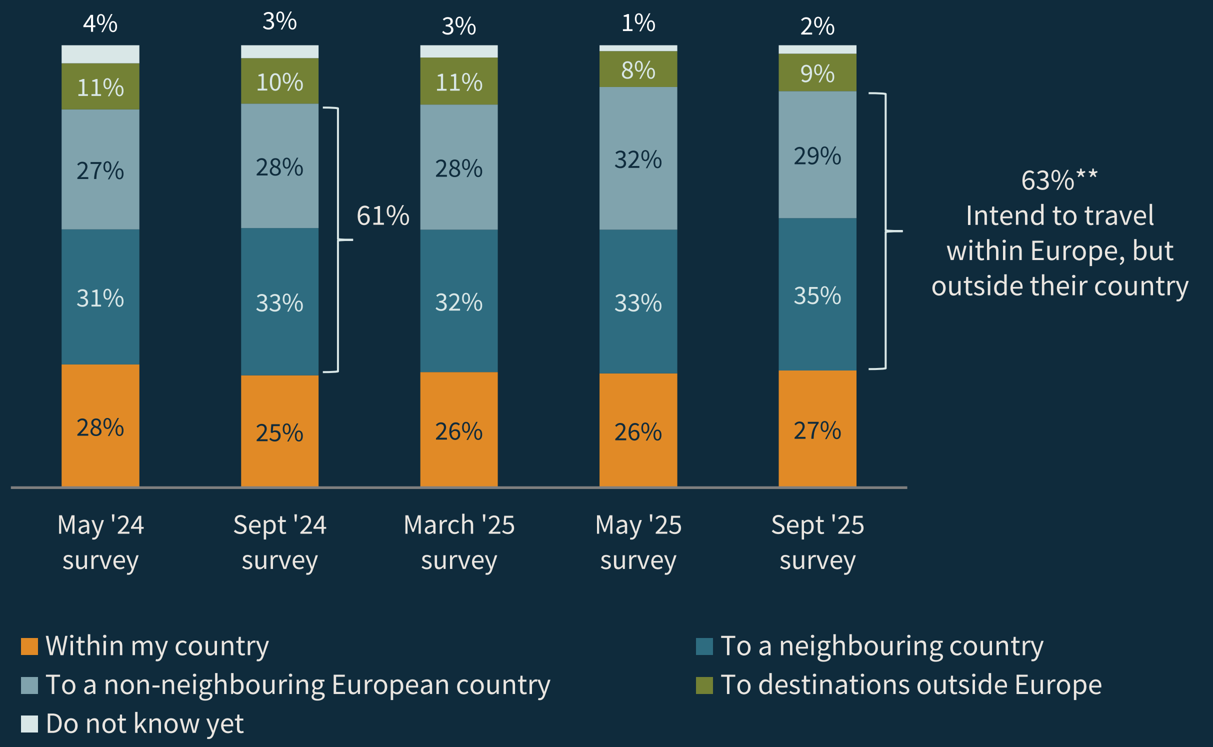
Q9. When are you most likely to go on your next trip either in your country or within Europe?

* Statistically significant difference vs a year ago (October 2024)

No. of respondents: 4,332

63% of travellers are planning an intra-European trip, up 3% from last year

Where will Europeans travel within the next six months?



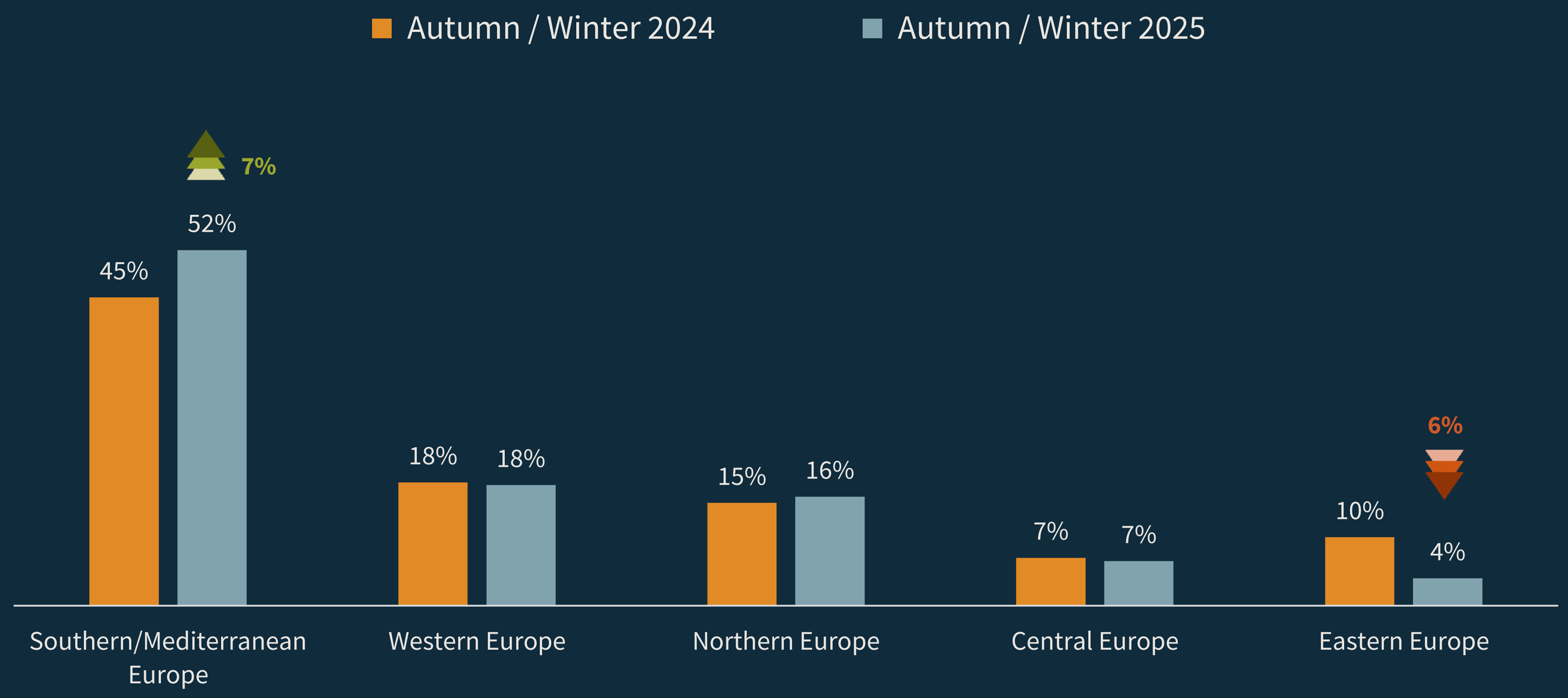
Q10. Where do you plan to travel in the next six months?

* Statistically significant difference vs a year ago (October 2024)

**Minor discrepancies in totals are the result of rounding

No. of respondents: 4,332

European travellers increasingly favour Southern Europe and Mediterranean destinations in the coming months (+7%)



NOTE:

Due to a broader regional scope, the figures for summer 2024 in this report may differ slightly from those published in last year's edition.

In 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 summer 2022 and 2023 are excluded from this analysis.

Statistically significant difference vs the previous year

Definitions of the regions can be seen in the Methodology

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

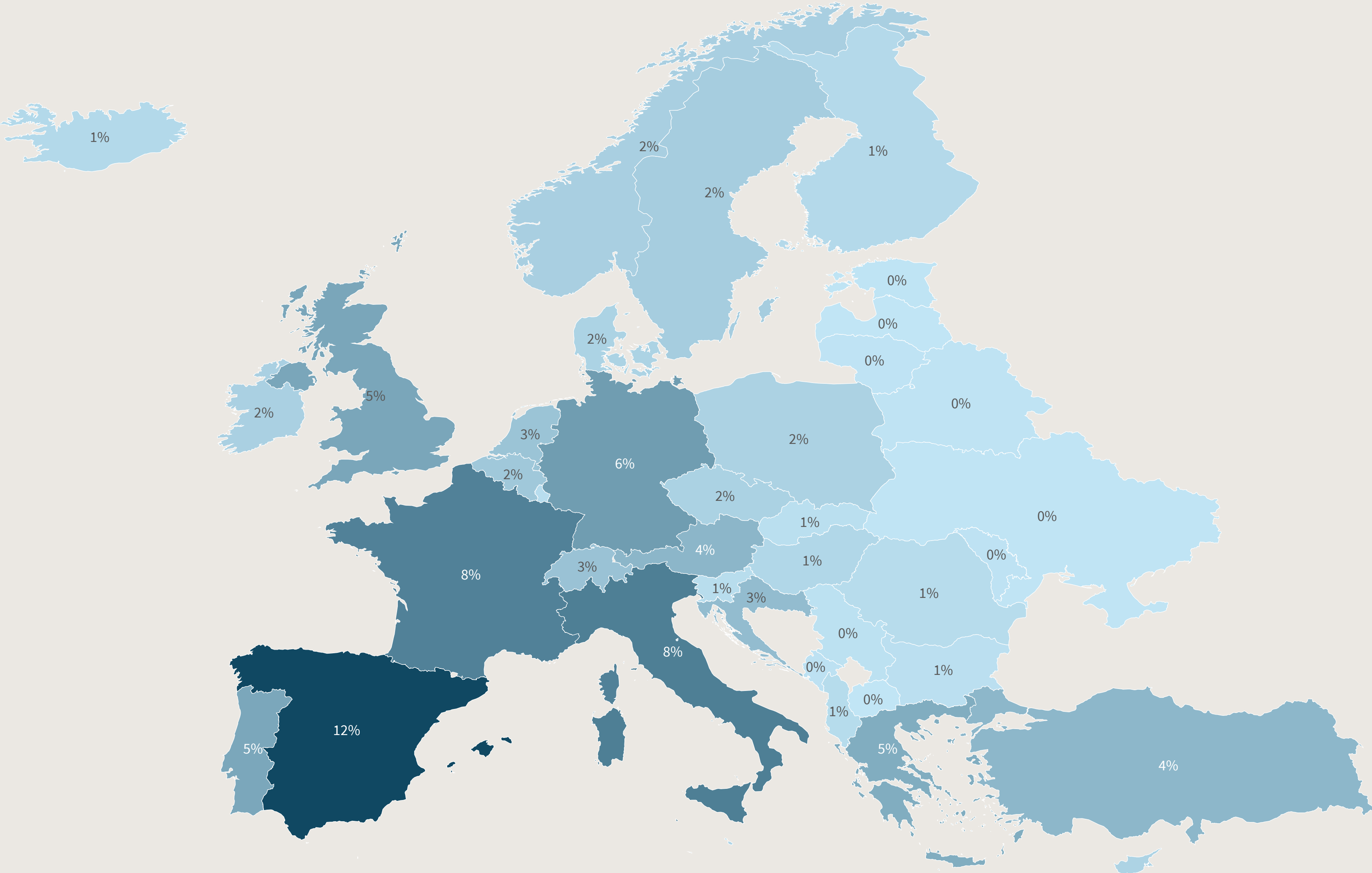
No. of respondents: 4,646

Preferred countries for the next intra-European trip

Horizon October ‘25 - March ‘26

TOP 10 COUNTRIES

Spain	**12%**	▲ 5%
Italy	**8%**	
France	**8%**	
Germany	**6%**	
UK	**5%**	
Portugal	**5%**	
Greece	**5%**	
Austria	**4%**	
Türkiye	**4%**	
Croatia	**3%**	

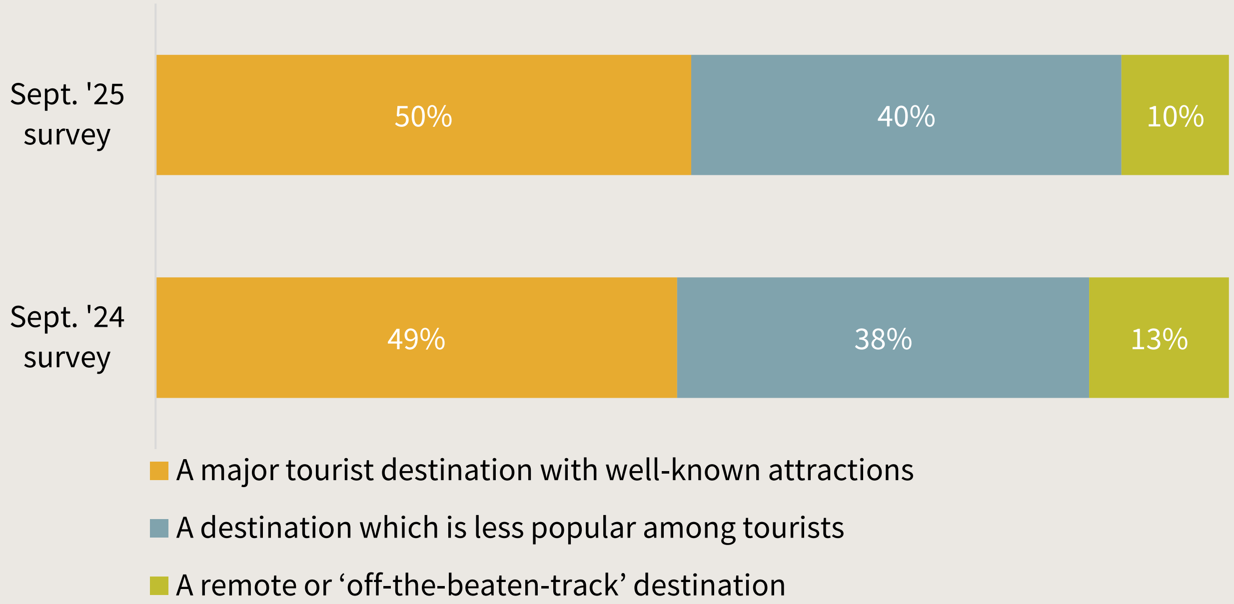


Q12. To which country(ies) do you plan to travel next?

No. of respondents: 4,646

Half of Europeans plan to visit major tourist destinations, while the rest seek less popular or off-the-beaten-track locations

Type of destination for the coming trip



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 (October 2024)

No. of respondents: 4,332

Top five markets favouring tourism hotspots

Italy **60%**

UK **58%**

Belgium **50%**

France **49%**

Spain **49%**

Top five markets favouring lesser-known or remote locations

Switzerland **60%**

Austria **57%**

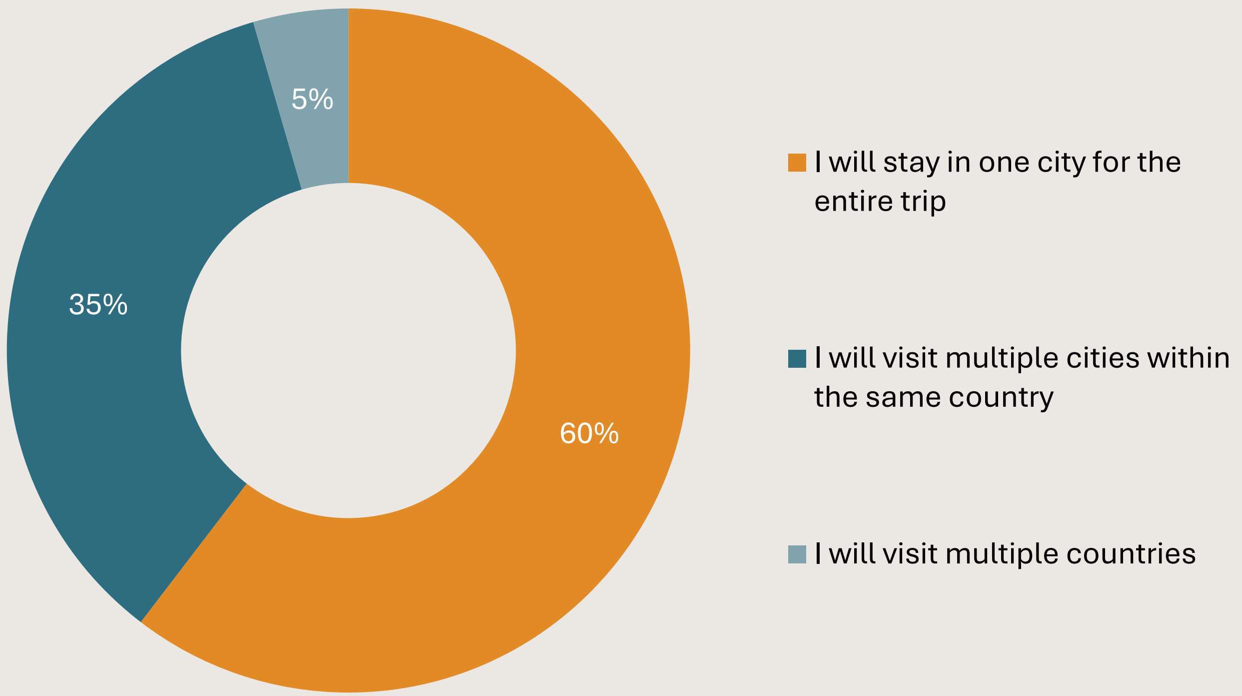
Netherlands **54%**

Poland **53%** 10%

Germany **53%**

Three in five Europeans plan to stay in a single destination for their entire trip

Planned itinerary for the next trip



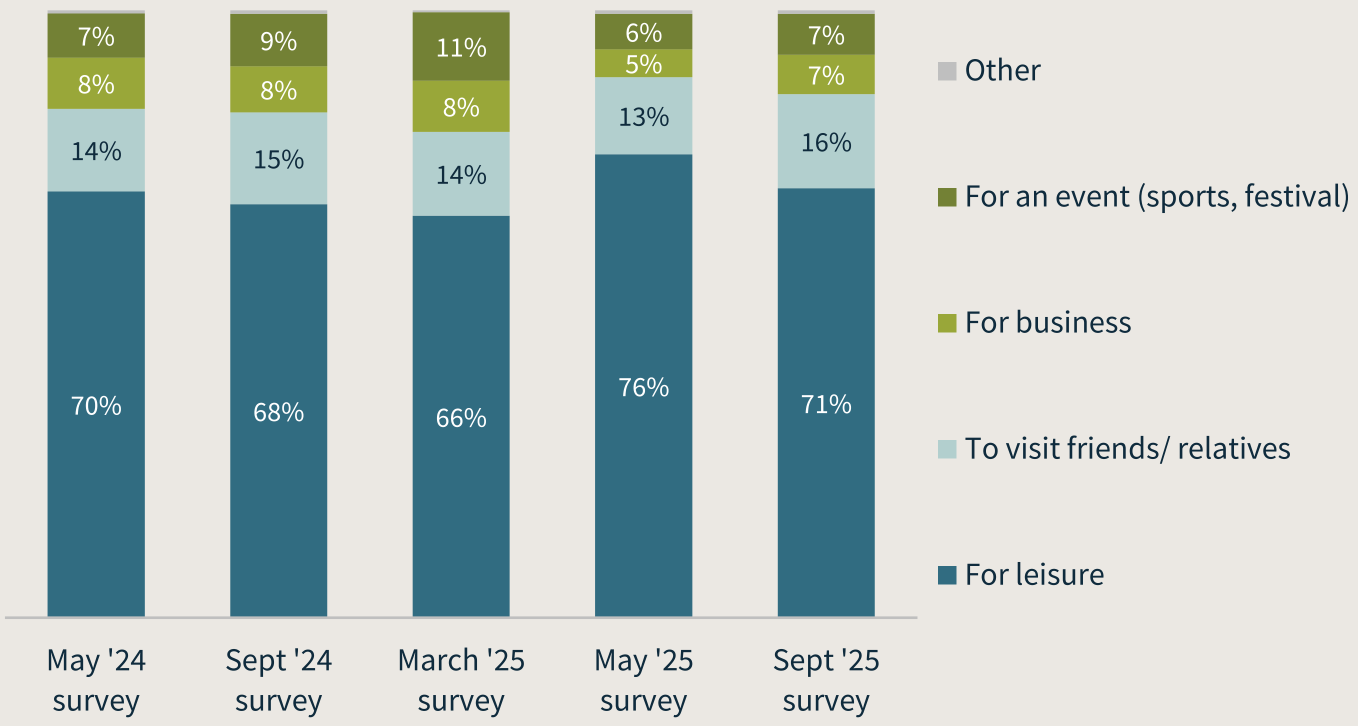
Single-destination travel dominates among city break (71%) and sun & beach (68%) trips, whereas culture & heritage (44%) and nature & outdoors (42%) travellers are more likely to explore multiple places within one country.

Q11. What kind of itinerary do you plan for your next trip within Europe?

No. of respondents: 4,332

Travel motivations hold steady, with leisure trips accounting for 71% of visits

Purpose of travel



Q8. For what reason are you most likely to travel within Europe next?

* Statistically significant difference vs a year ago (October 2024)

No. of respondents: 4,332

Top three markets to take a leisure trip

Netherlands

77%

Italy

76% 3%*

France

76%

Top three markets to take a business trip

Italy

8%

Spain

8%

UK

7%

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

City Breaks lead autumn travel, followed by Sun & Beach trips (+5%) as Europeans seek the last rays of sunshine

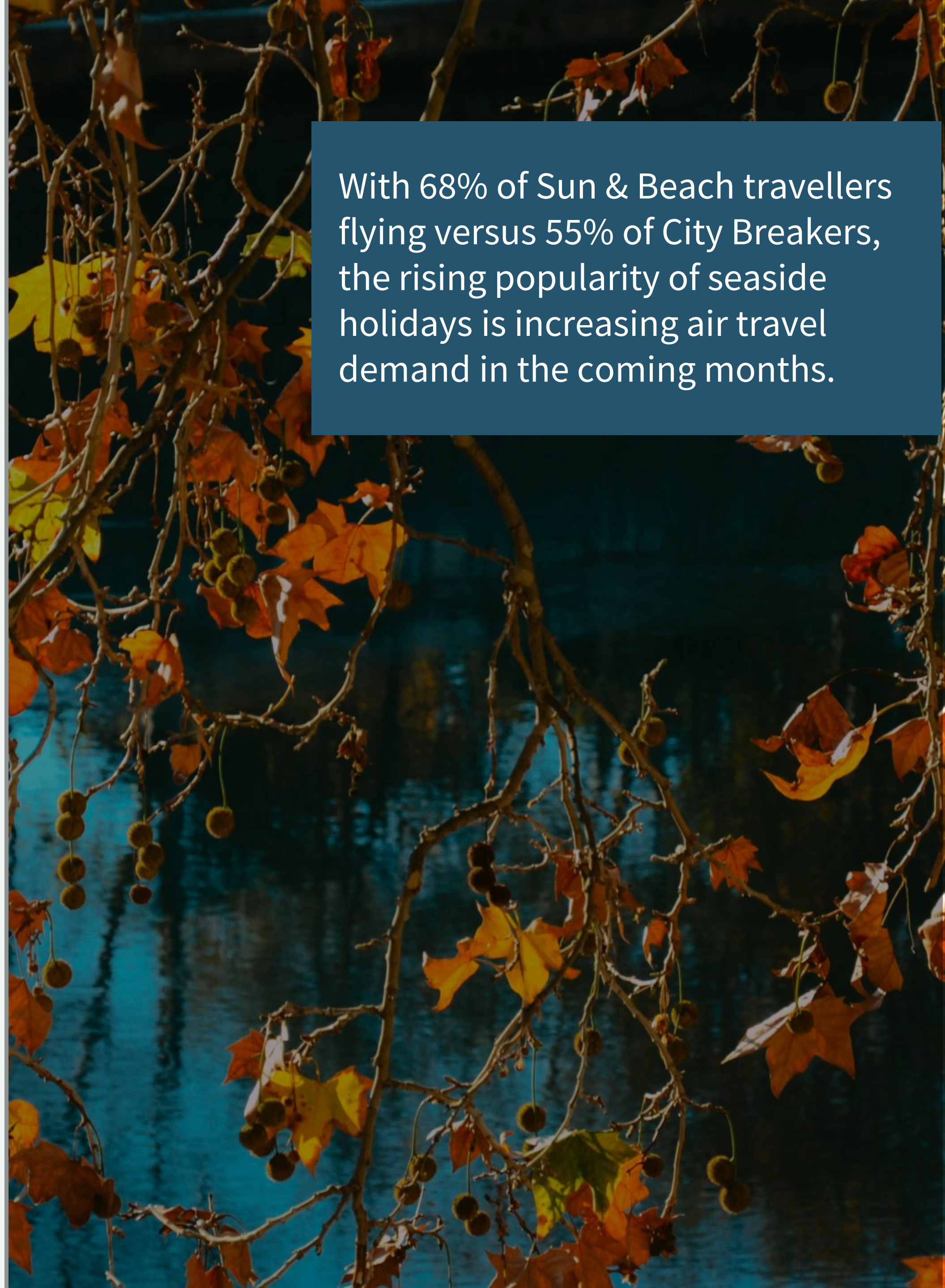
Preferred type of leisure trip in the next six months

NOTE: Please note that, due to changes in coastal travel classifications in the 2025 survey questionnaire, the value for "Sun & Beach" is not directly comparable with the values reported in previous editions of this research.

Q16. What type of leisure trip within Europe are you most likely to undertake next?

* Statistically significant difference vs a year ago (October 2024)

No. of respondents: 4,332

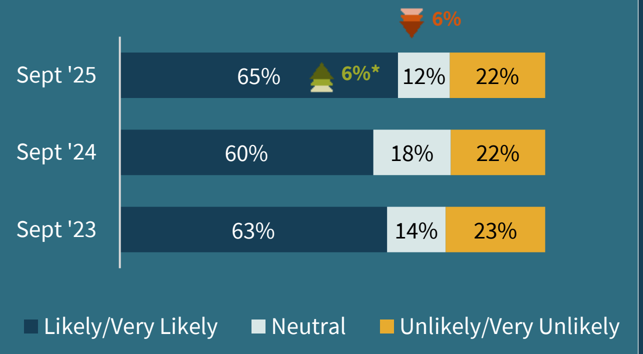


With 68% of Sun & Beach travellers flying versus 55% of City Breakers, the rising popularity of seaside holidays is increasing air travel demand in the coming months.

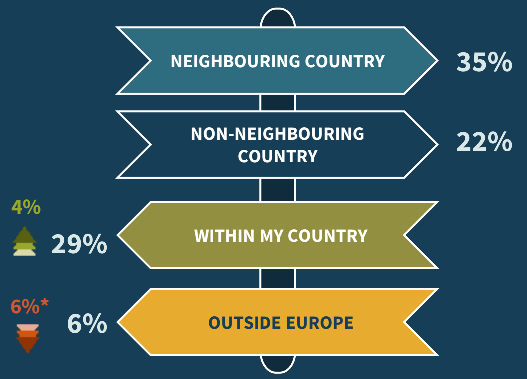
Austrians' travel plans

Travel horizon: October 2025-March 2026

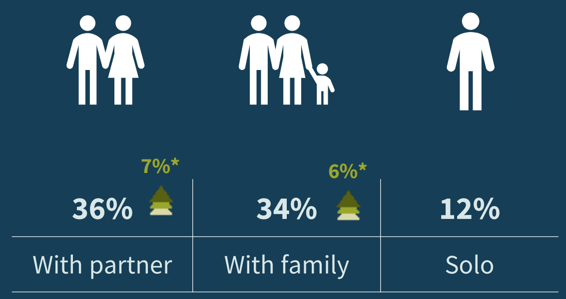
INTENTION TO TRAVEL



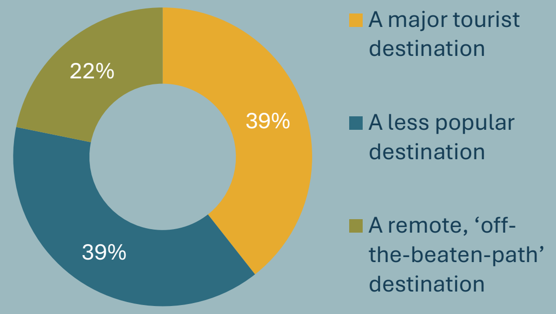
WHERE TO?



TRAVELLING WITH?



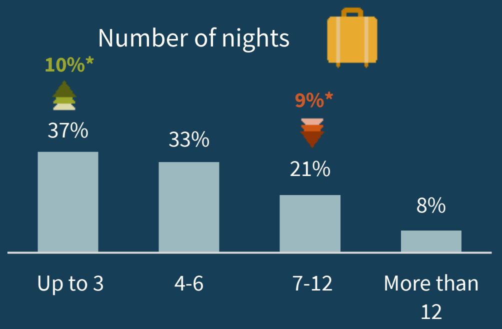
TYPE OF DESTINATION

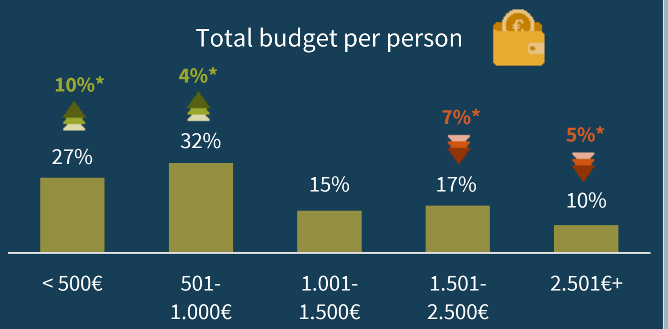


TOP SPENDING PRIORITIES

	34%	Accommodation
	22%	Food & Drinks
	16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Germany	13% 4%*
Italy	10%
Croatia	8%
Spain	6%
Greece	5%

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

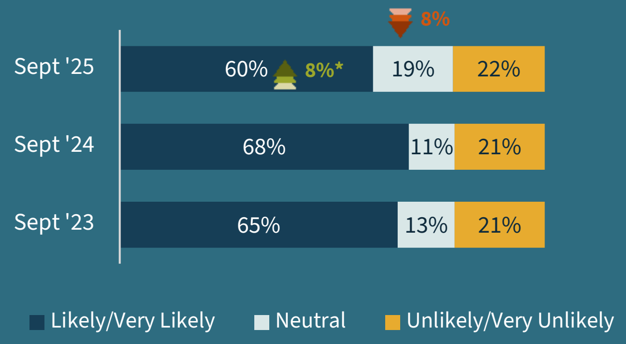
* Statistically significant difference vs a year ago (September 2024)

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

Belgians' travel plans

Travel horizon: October 2025-March 2026

INTENTION TO TRAVEL



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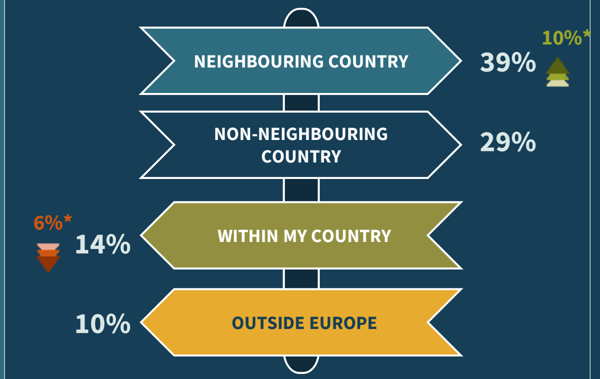

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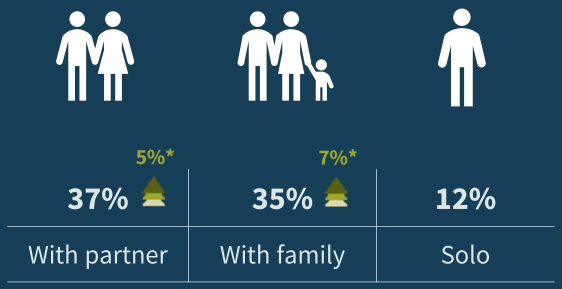
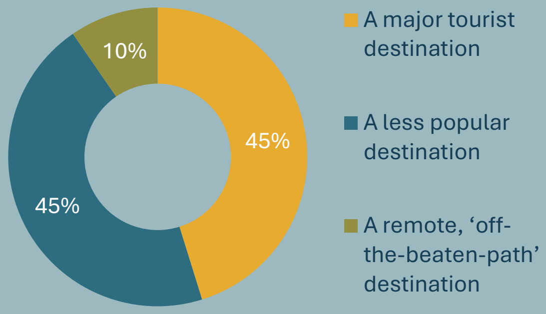


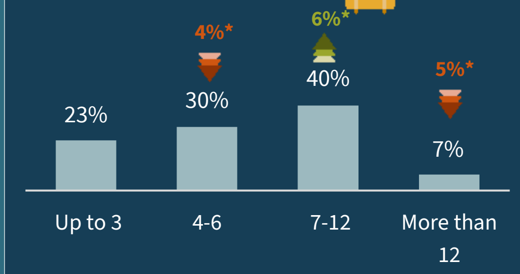
TYPE OF DESTINATION

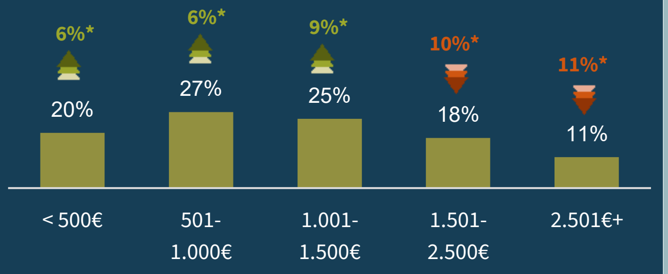


TOP SPENDING PRIORITIES

	29%	Accommodation
	25%	Food & Drinks
	16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
France	17%	5%*
Spain	16%	10%
Italy	7%	
Netherlands	5%	
Germany	5%	

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

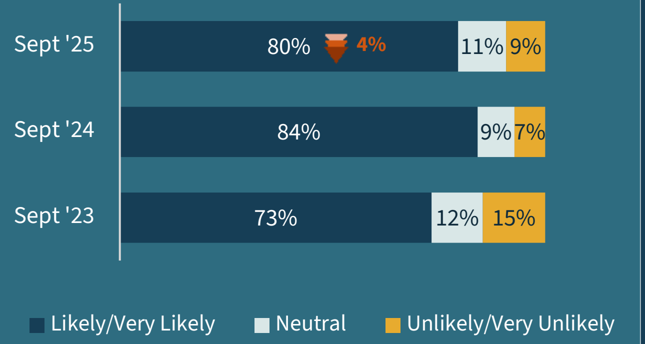
* Statistically significant difference vs a year ago (September 2024)

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

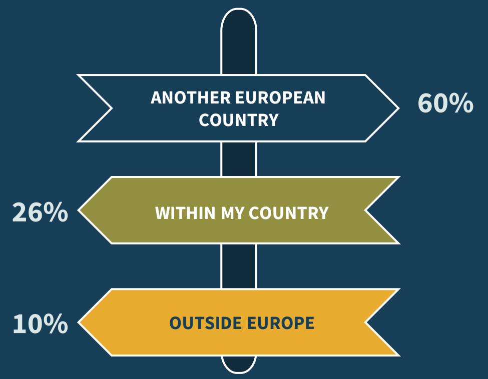
Britons' travel plans

Travel horizon: October 2025-March 2026

INTENTION TO TRAVEL



WHERE TO?



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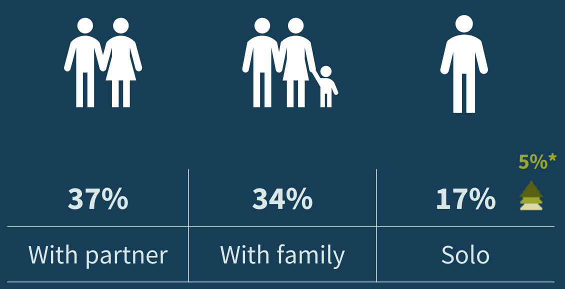
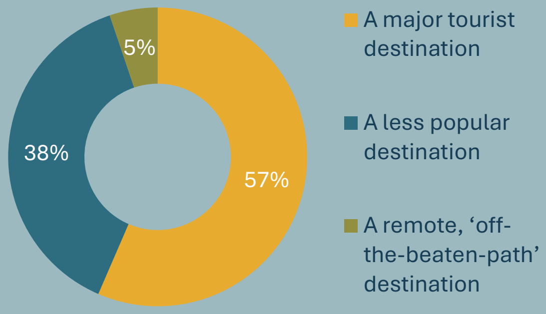


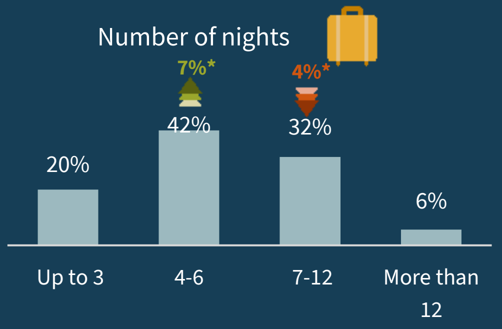
TYPE OF DESTINATION

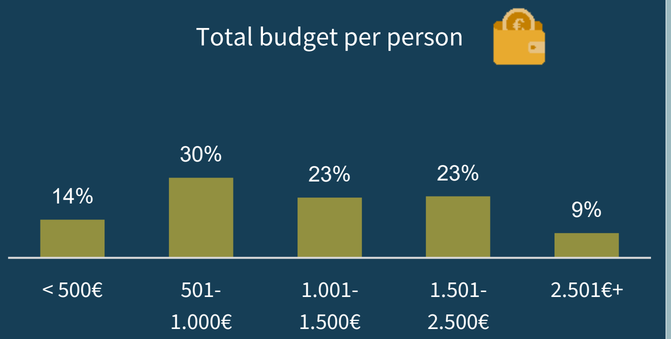


TOP SPENDING PRIORITIES

31%	Accommodation
24%	Food & Drinks
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	17%
France	10%
Italy	8%
Portugal	5%
Greece	5%

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

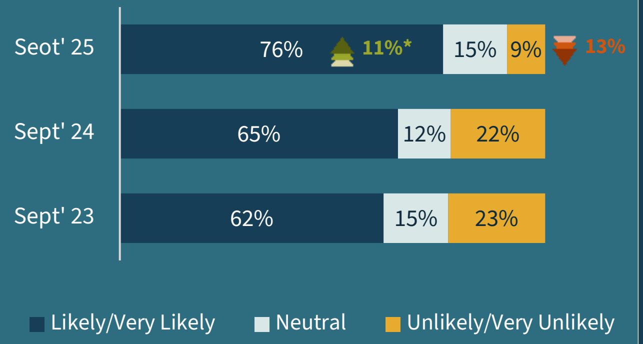
* Statistically significant difference vs a year ago (September 2024)

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

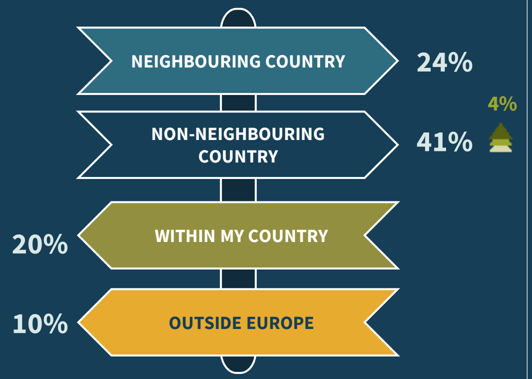
Dutch travel plans

Travel horizon: October 2025-March 2026

INTENTION TO TRAVEL



WHERE TO?



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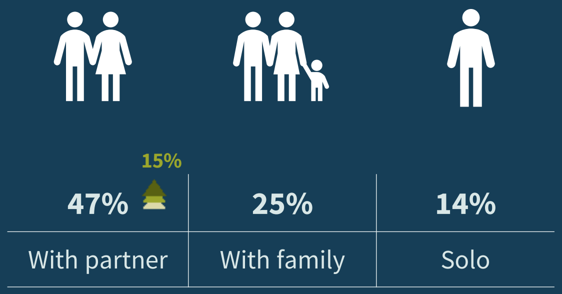
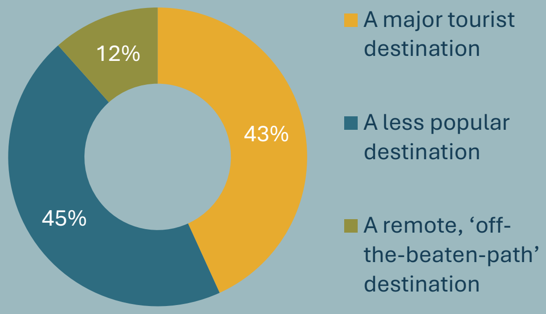


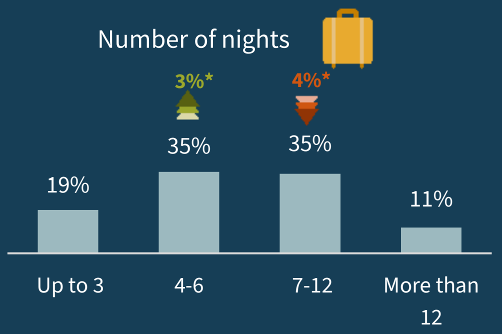
TYPE OF DESTINATION

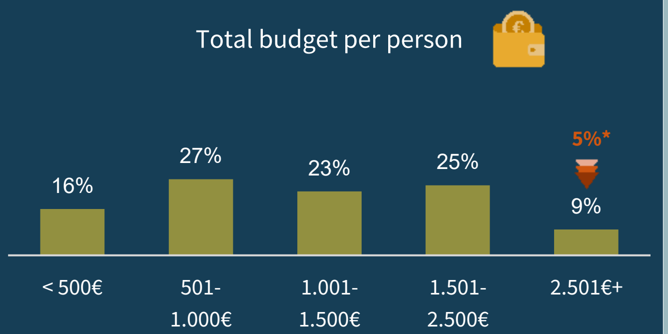


TOP SPENDING PRIORITIES

34%	Accommodation
27%	Food & Drinks
1%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	17% ▲10%
Germany	13% ▲5%*
France	9%
Belgium	7%
Italy	6%

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

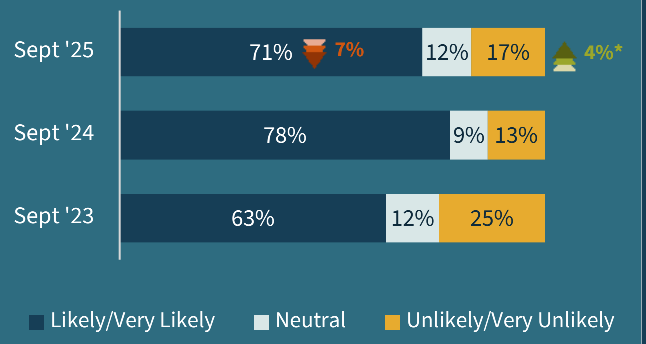
* Statistically significant difference vs a year ago (September 2024)

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

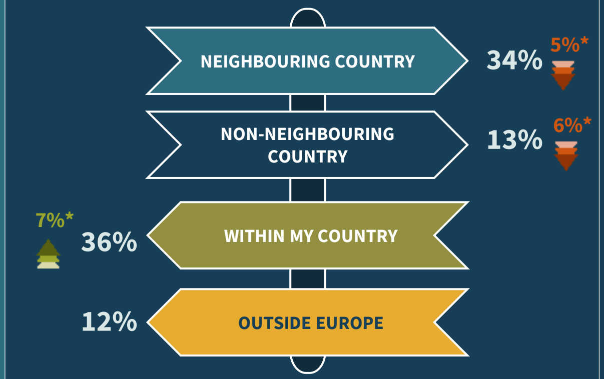
French travel plans

Travel horizon: October 2025-March 2026

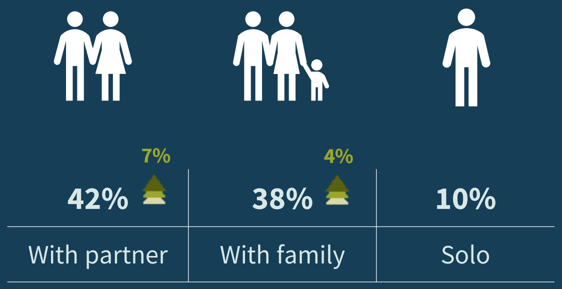
INTENTION TO TRAVEL



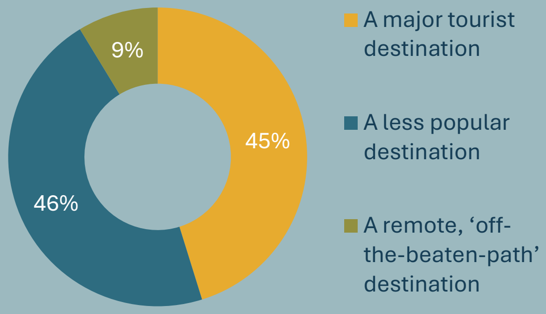
WHERE TO?



TRAVELLING WITH?



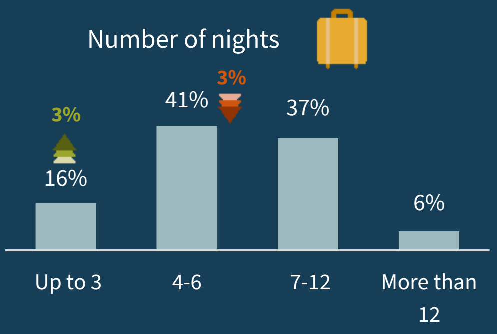
TYPE OF DESTINATION

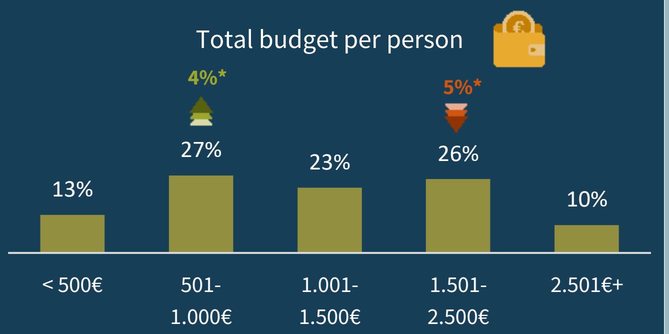


TOP SPENDING PRIORITIES

33%	Accommodation
19%	Food & Drinks
18%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	13% 6%*
Italy	11%
Portugal	8% 4%*
Greece	7%
UK	7%

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

* Statistically significant difference vs a year ago (September 2024)

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

Germans' travel plans

Travel horizon: October 2025-March 2026

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '25	73% (▼ 6%)	14%	13% (▲ 6%*)
Sept '24	79%	8%	13%
Sept '23	62%	13%	24%

WHERE TO?

NEIGHBOURING COUNTRY	35%
NON-NEIGHBOURING COUNTRY	24% (▼ 4%*)
WITHIN MY COUNTRY	28% (▲ 3%*)
OUTSIDE EUROPE	8% (▼ 4%*)

TRAVELLING WITH?

With partner	With family	Solo
34% (▲ 4%*)	34%	19% (▲ 8%*)

TYPE OF DESTINATION

A major tourist destination	47%
A less popular destination	34%
A remote, 'off-the-beaten-path' destination	19%

TOP SPENDING PRIORITIES

33%	Accommodation
21%	Food & Drinks
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
21% (▲ 4%)	37%	33% (▼ 4%)	8%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
19% (▲ 5%*)	27%	19%	25% (▼ 5%)	10%

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	12% (▲ 5%*)
Austria	10%
Italy	8%
Türkiye	7%
France	7%

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

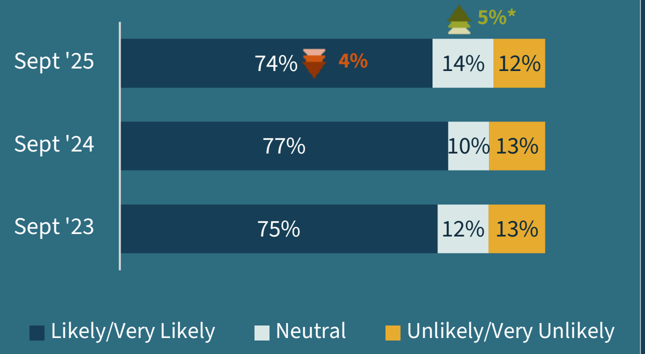
* Statistically significant difference vs a year ago (September 2024)

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

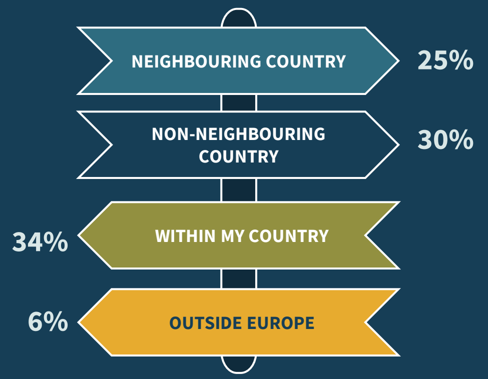
Italians' travel plans

Travel horizon: October 2025-March 2026

INTENTION TO TRAVEL



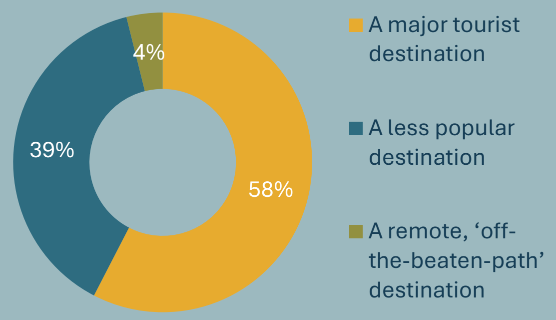
WHERE TO?



TRAVELLING WITH?

38%	36%	9%
With family	With partner	Solo

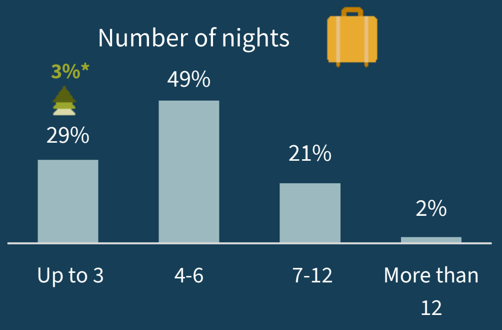
TYPE OF DESTINATION

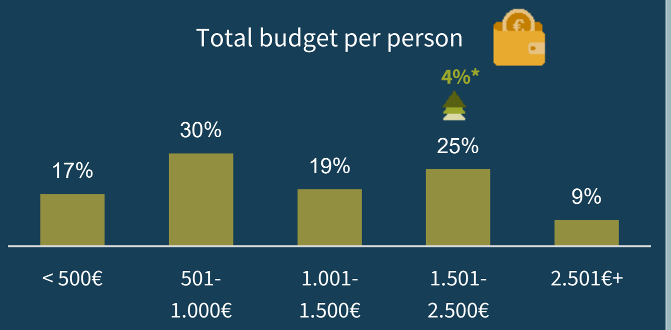


TOP SPENDING PRIORITIES

29%	Accommodation
22%	Food & Drinks
19%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	14% 5%*
France	11%
UK	10% 4%*
Austria	5%
Germany	5%

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

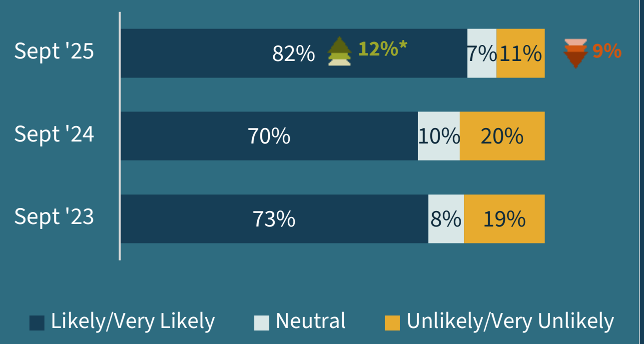
* Statistically significant difference vs a year ago (September 2024)

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

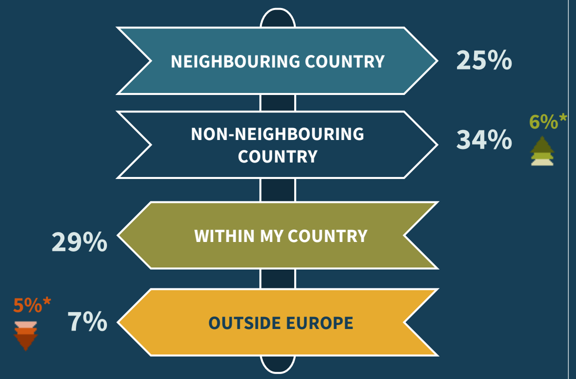
Poles' travel plans

Travel horizon: October 2025-March 2026

INTENTION TO TRAVEL



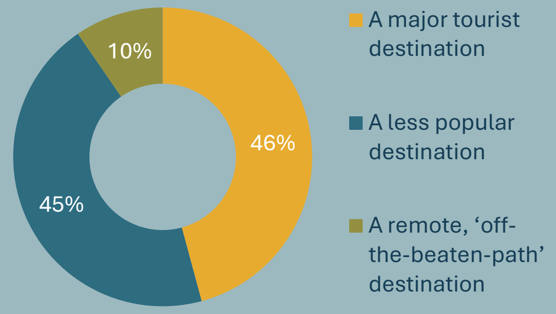
WHERE TO?



TRAVELLING WITH?

With family	With partner	Solo
44% (7%*)	30%	12%

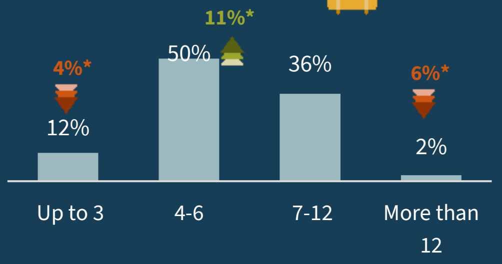
TYPE OF DESTINATION

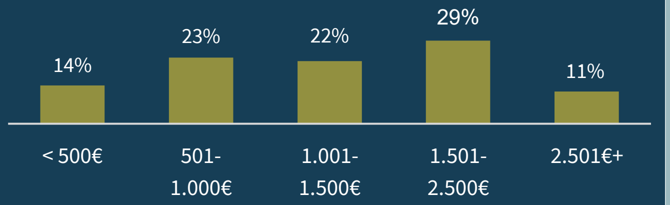


TOP SPENDING PRIORITIES

30%	Accommodation
20%	Food & Drinks
19%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	11% (5%*)
Italy	10% (3%*)
Germany	6%
Greece	6%
Portugal	5%

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

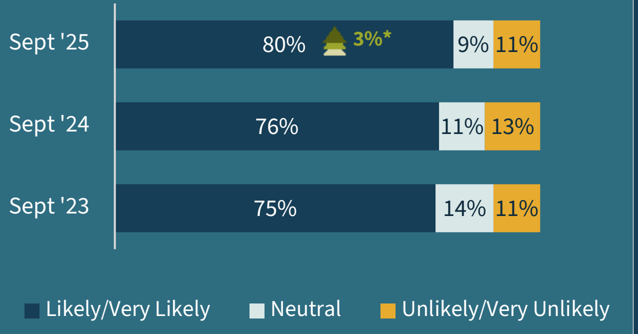
* Statistically significant difference vs a year ago (September 2024)

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

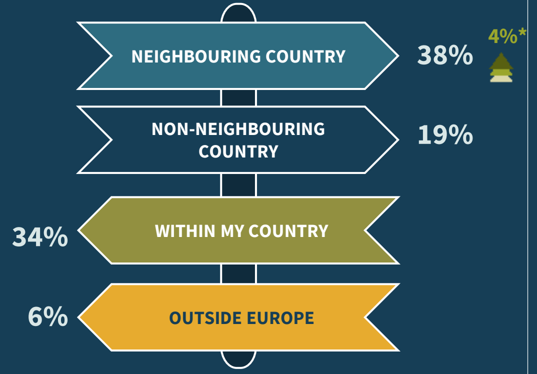
Spaniards' travel plans

Travel horizon: October 2025-March 2026

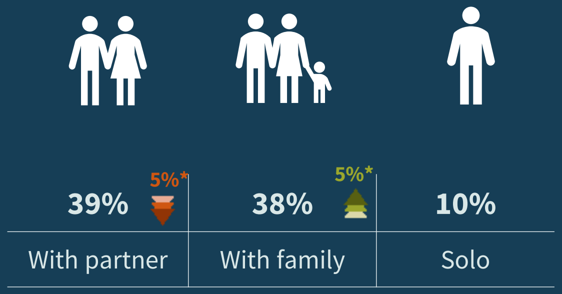
INTENTION TO TRAVEL



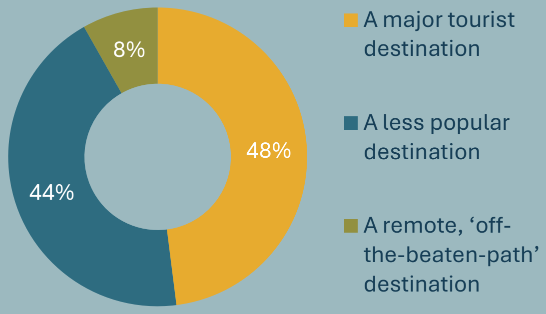
WHERE TO?



TRAVELLING WITH?



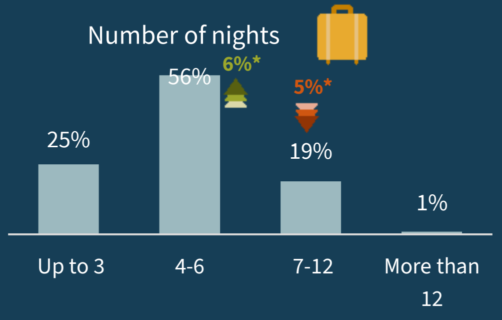
TYPE OF DESTINATION

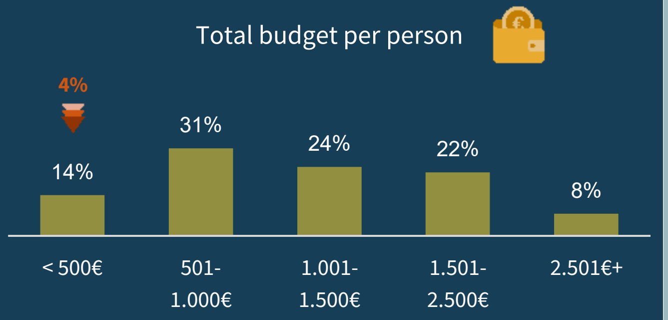


TOP SPENDING PRIORITIES

29%	Accommodation
27%	Food & Drinks
17%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	14%
Italy	11%
Portugal	9%
UK	8%
Germany	6%

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

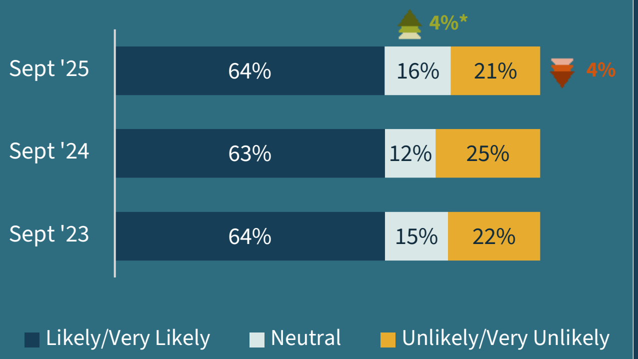
* Statistically significant difference vs a year ago (September 2024)

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

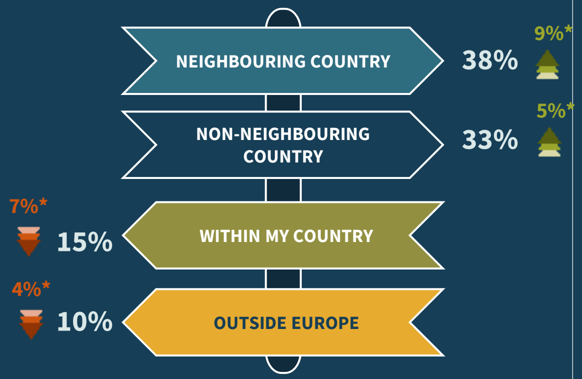
Swiss travel plans

Travel horizon: October 2025-March 2026

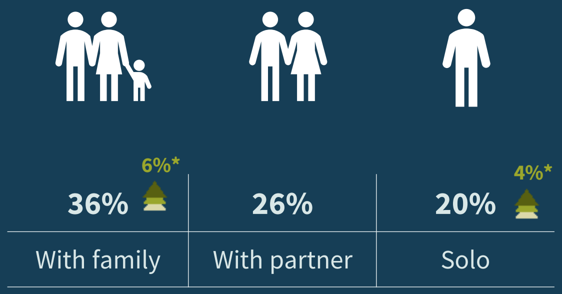
INTENTION TO TRAVEL



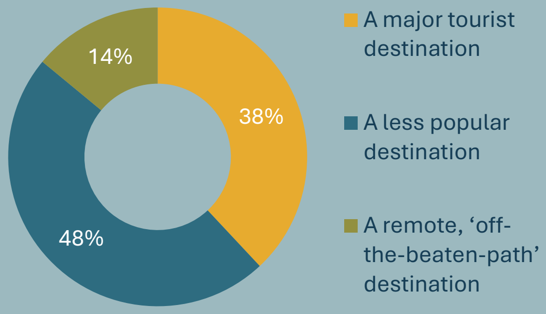
WHERE TO?



TRAVELLING WITH?



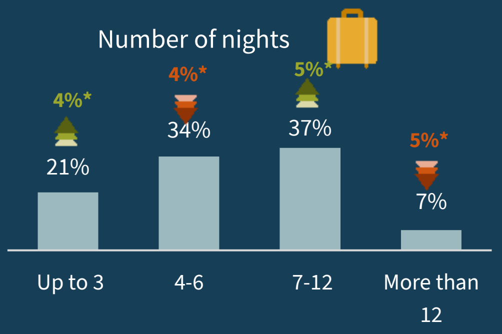
TYPE OF DESTINATION

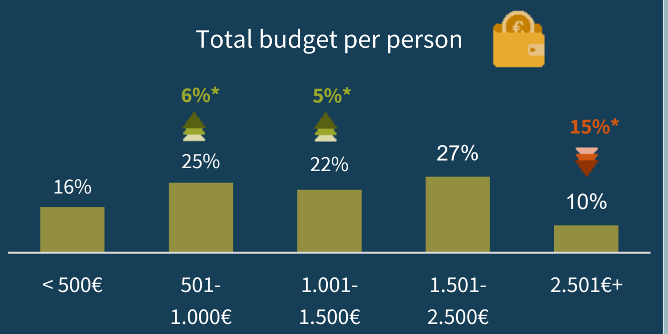


TOP SPENDING PRIORITIES

28%	Accommodation
21%	Food & Drinks
15%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	12% 7%*
Spain	10% 5%*
Germany	9% 4%*
France	8%
Portugal	6%

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

* Statistically significant difference vs a year ago (September 2024)

No. of respondents: 463 (total sample of respondents per country)

Planning the details

02

Fewer trips: More Europeans (+7%) plan less frequent travel this autumn and winter

As Europeans get older, more prefer single trips, rising from 32% at ages 18–24 to 46% at over 55.

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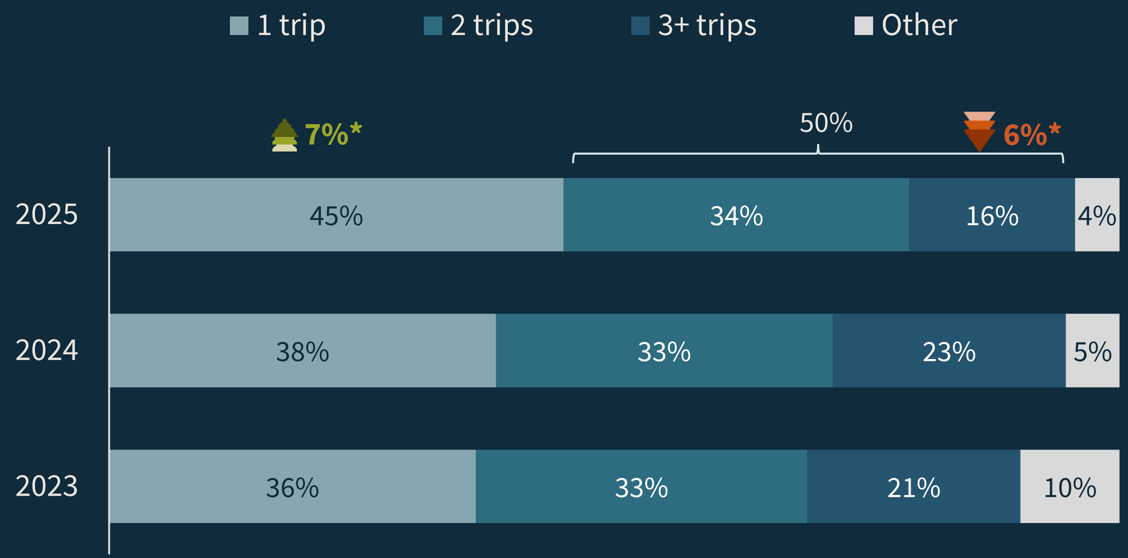
Number of intended trips within Europe in the next six months



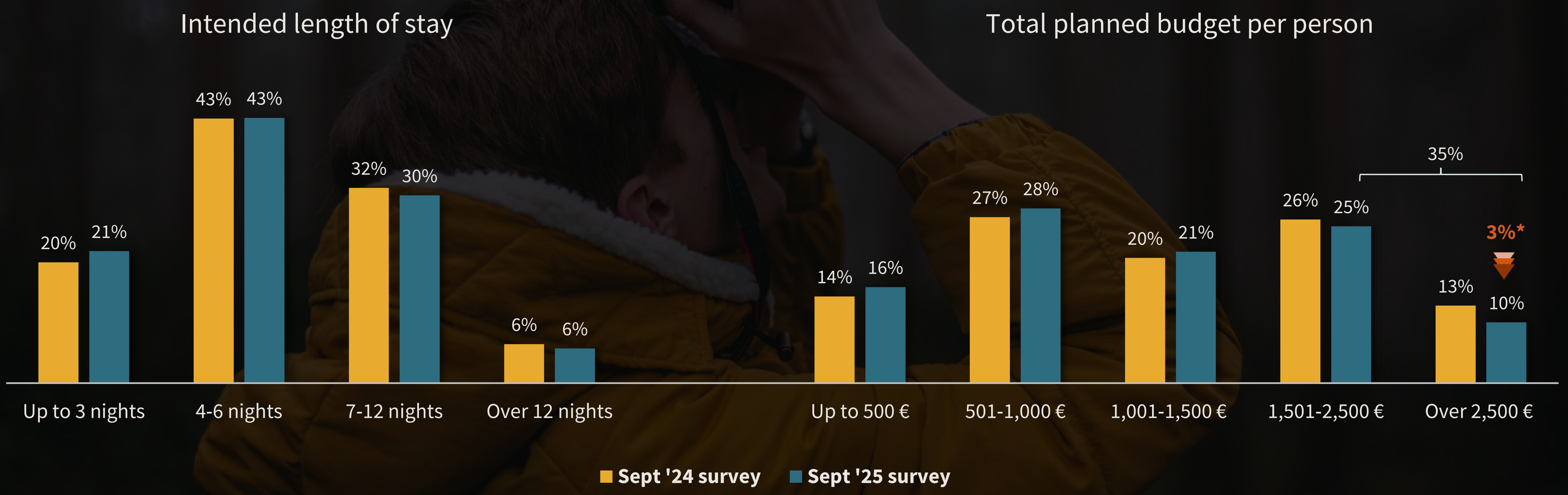
Q7. How many trips do you plan to take in the next 6 months, within Europe?

* Statistically significant difference vs a year ago (October 2024)

No. of respondents: 4,332

European travellers are maintaining their travel habits, but their budgets are somewhat tighter

Trips of 4–6 nights remain Europeans' top choice, while spending over €1,500 slightly declines (–4%)



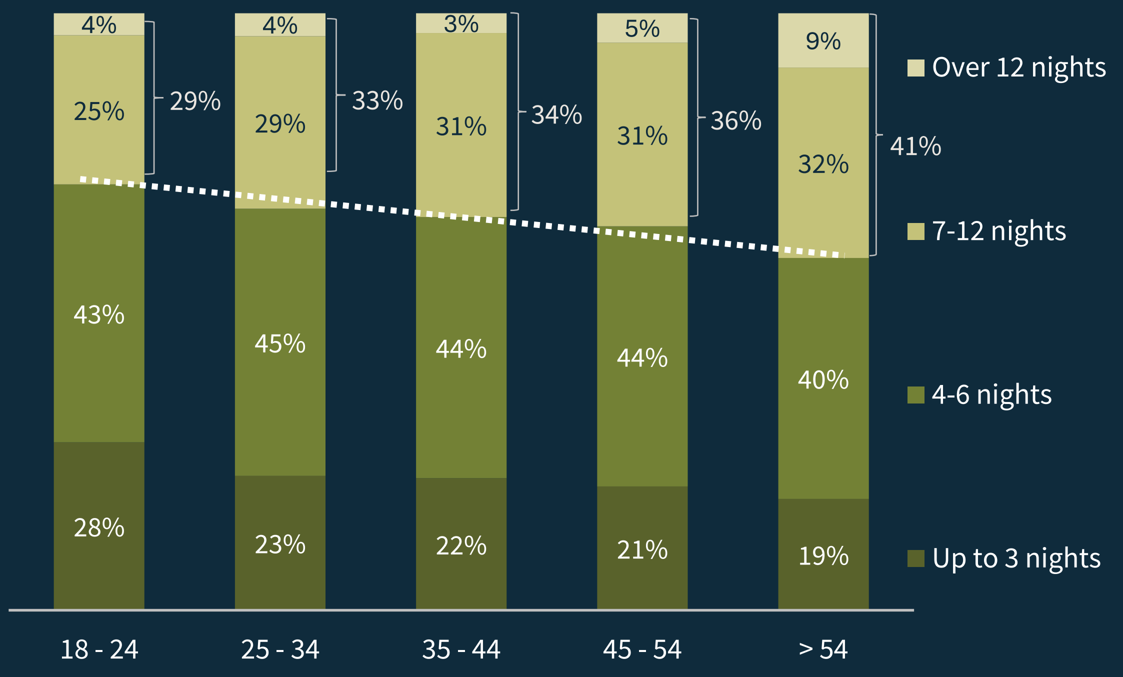
Q18. What would be the length of your next overnight trip?
Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

* Statistically significant difference vs a year ago (October 2024)

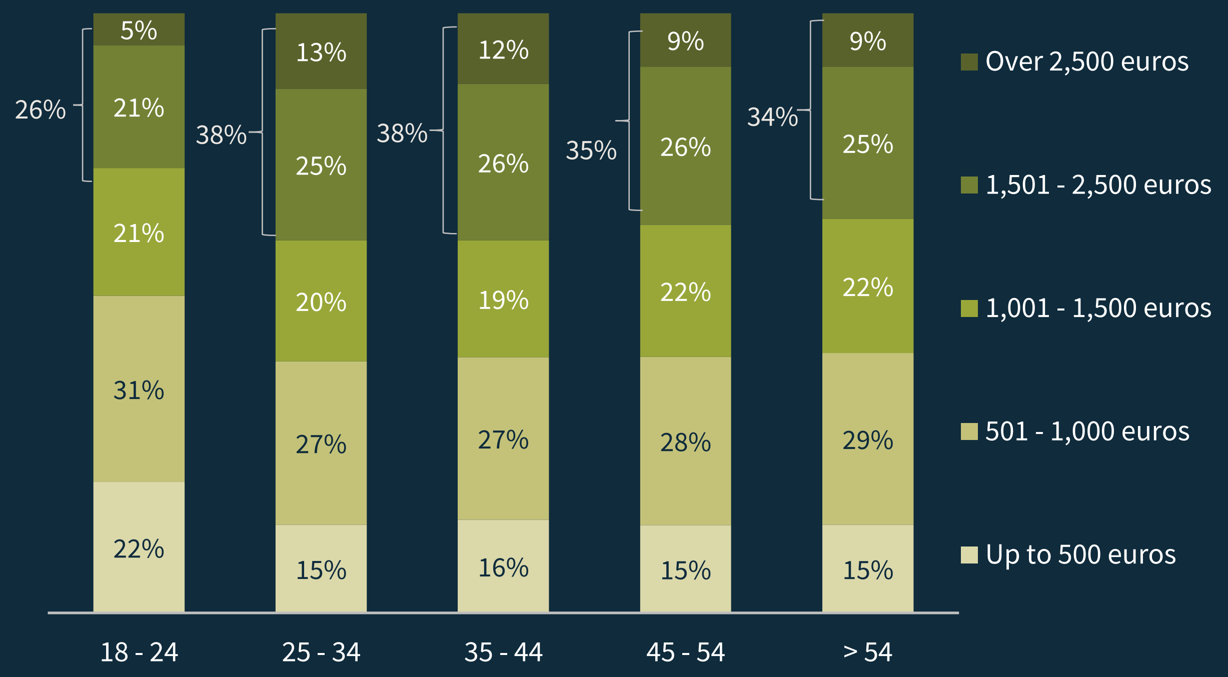
No. of respondents: 4,332

Trip length increases with age, while travellers aged 25–44 are most likely to spend over €1,500

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)?

No. of respondents: 4,332

How do Europeans shape their travel plans per region?

Analysis of type of preferred holidays, length of stay and budget within each destination region

	Southern / Mediterranean Europe	Western Europe	Northern Europe	Central Europe	Eastern Europe
TOP-3 TYPES OF PREFERRED TRIPS	**28%** Sun & Beach **17%** Culture & Heritage **16%** City Break	**21%** City Break **18%** Culture & Heritage **15%** Nature & Outdoors	**23%** Culture & Heritage **21%** City Break **17%** Nature & Outdoors	**27%** City Break **20%** Culture & Heritage **12%** Wellness & Relaxation	**20%** City Break **20%** Culture & Heritage **13%** Wellness & Relaxation
MOST COMMON LENGTH OF STAY	**41%** 4-6 nights **28%** 7-9 nights	**42%** 4-6 nights **24%** up to 3 nights	**46%** 4-6 nights **25%** 7-9 nights	**41%** 4-6 nights **29%** up to 3 nights	**39%** 4-6 nights **33%** 7-9nights
MOST COMMON BUDGET (per person)	**28%** 1501- 2500 € **26%** 500-1000 €	**29%** 1501- 2500 € **24%** 500-1000 €	**27%** 1501- 2500 € **26%** 500-1000 €	**30%** 500-1000 € **24%** 1001-1500 €	**30%** 1501-2500 € **25%** 500-1000 €

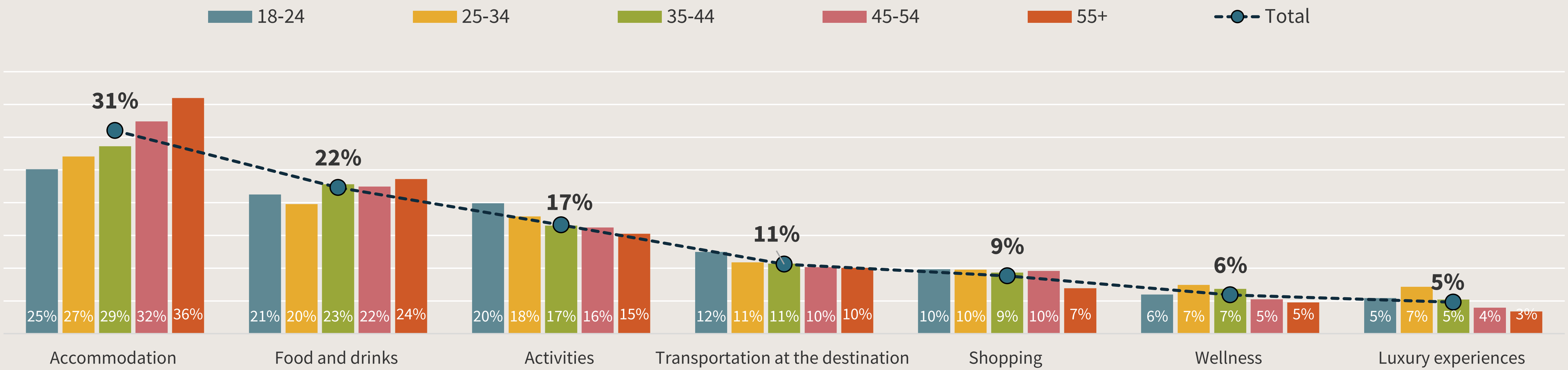
Definitions of the regions can be seen in the Methodology

NOTE: Results on Eastern Europe should be treated with caution, due to small sample base (N=200)

No. of respondents: 4,646

On which category will travellers spend the most?

Spending on accommodation rises with age, while spending on activities declines



Different budgets, similar priorities: accommodation, food & drinks, and activities remain the top spending categories across all budget levels.

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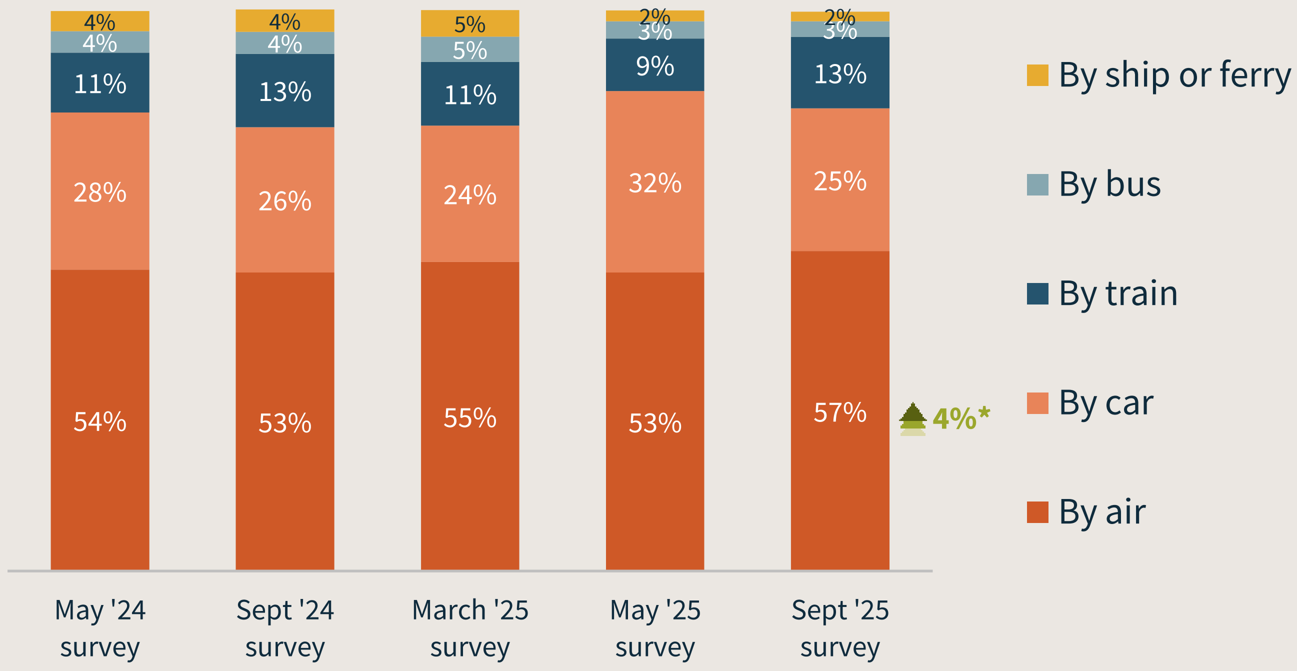
Q21. For your next trip to Europe, which of the following categories do you expect to spend the most on?

No. of respondents: 4,332

High demand for air travel across Europe (+4%), with train journeys holding at 13%

Preferred modes of transport for intra-European travel



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

Statistically significant difference vs a year ago (October 2024)

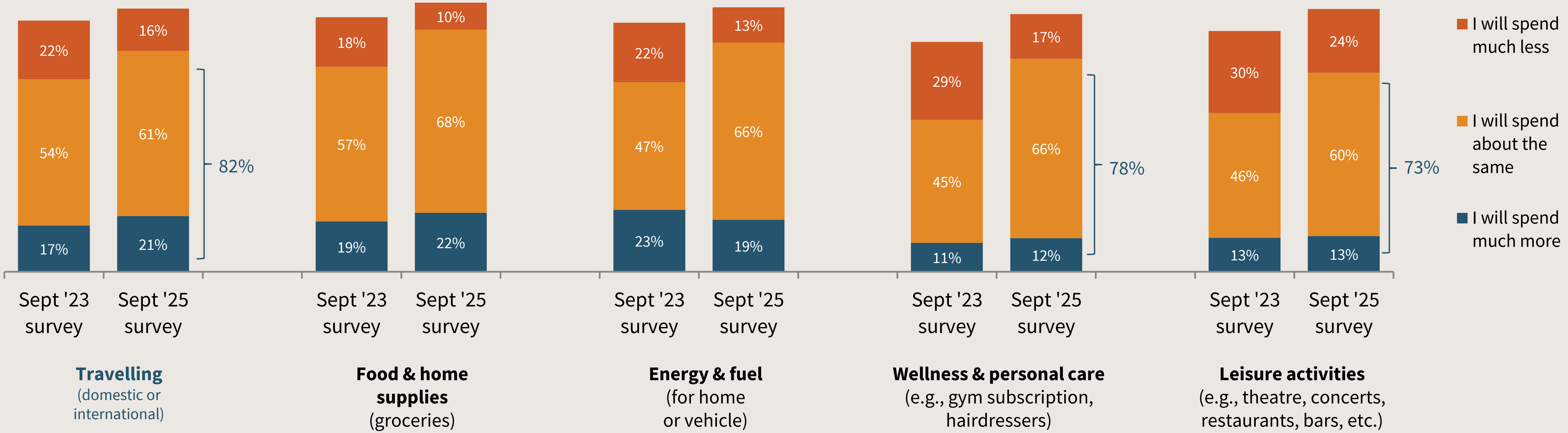
Top three reasons for flying	Top three reasons for driving
Speed 26%	**Comfort** 19%
Value for money 22%	**Easy to plan & book** 17%
Easy to plan & book 14%	**Value for money** 17%

No. of respondents: 4,332

Travel considerations

03

Travel remains a key priority, with 82% of Europeans maintaining or increasing their travel budget – well above their spending on leisure or wellness activities



Europeans cutting their travel budget are more likely to travel domestically (34%) compared to 22% of those planning to spend more.

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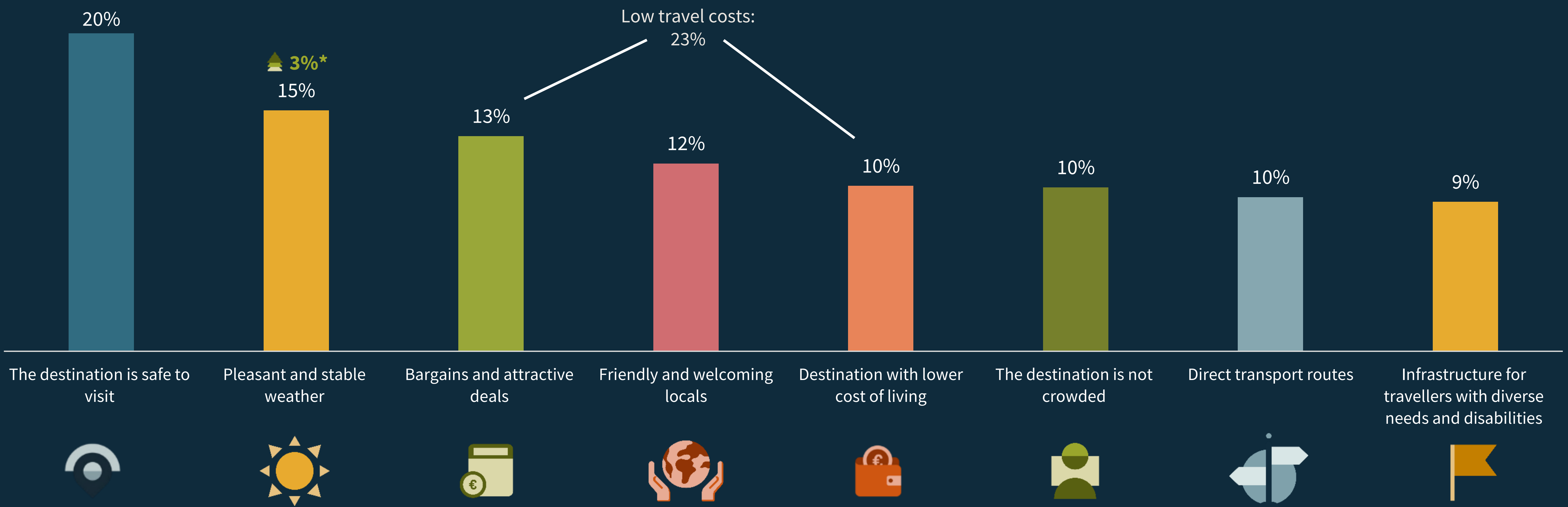
NOTE: The question was included in the 2023 survey waves, discontinued in 2024, and reintroduced in Wave 22 — results are therefore comparable only with the same period in 2023.

Q4. Thinking about the next six months, do you foresee any changes in your budget for each of the following categories?

No. of respondents: 5,963

Safety and value remain top priorities for European travellers, together with a rise in destinations with favourable weather (+3%)

Europeans’ top criteria in choosing a travel destination



* Statistically significant difference vs a year ago (October 2024)

No. of respondents: 5,963

Q3 What criteria will play the most important role in choosing your next holiday destination?

What do European travellers worry about?

Finance-related issues remain Europeans' leading travel concern, followed by geopolitical tensions and overcrowded destinations

21%
Rise in the overall cost of my trip due to inflation

16%
Economic situation and personal finances

14%
The ongoing conflict between Russia and Ukraine

11%
Too many visitors at the destinations I want to visit

10%
Extreme weather events

9%
Disruptions in transport options due to strikes or under-staffing

9%
Potential impact on travel safety due to tensions in the Middle East

5%
The environmental footprint of my travel

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

Young travellers (18–24) show greater concern than those over 54 about both environmental impact (16% vs. 10%) and strict booking policies (14% vs. 7%).

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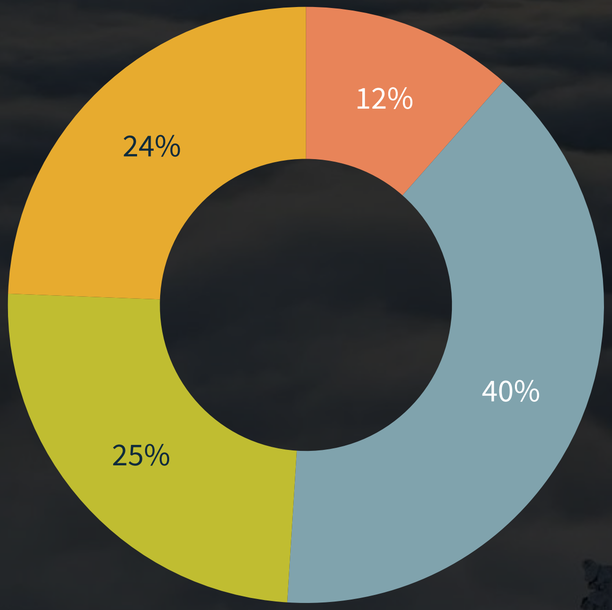
No. of respondents: 5,963

Q2. What currently concerns you the most about travelling within Europe?

The impact of geopolitical conflicts on travel decisions

Geopolitical tensions influence travel choices for 89% of Europeans – mainly by avoiding unsafe destinations

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		Top three markets that avoid any disruption to their travel experience	
Poland	**48%**	**Switzerland**	**28%**
UK	**44%**	**Germany**	**28%**
Switzerland	**40%**	**Italy**	**27%**

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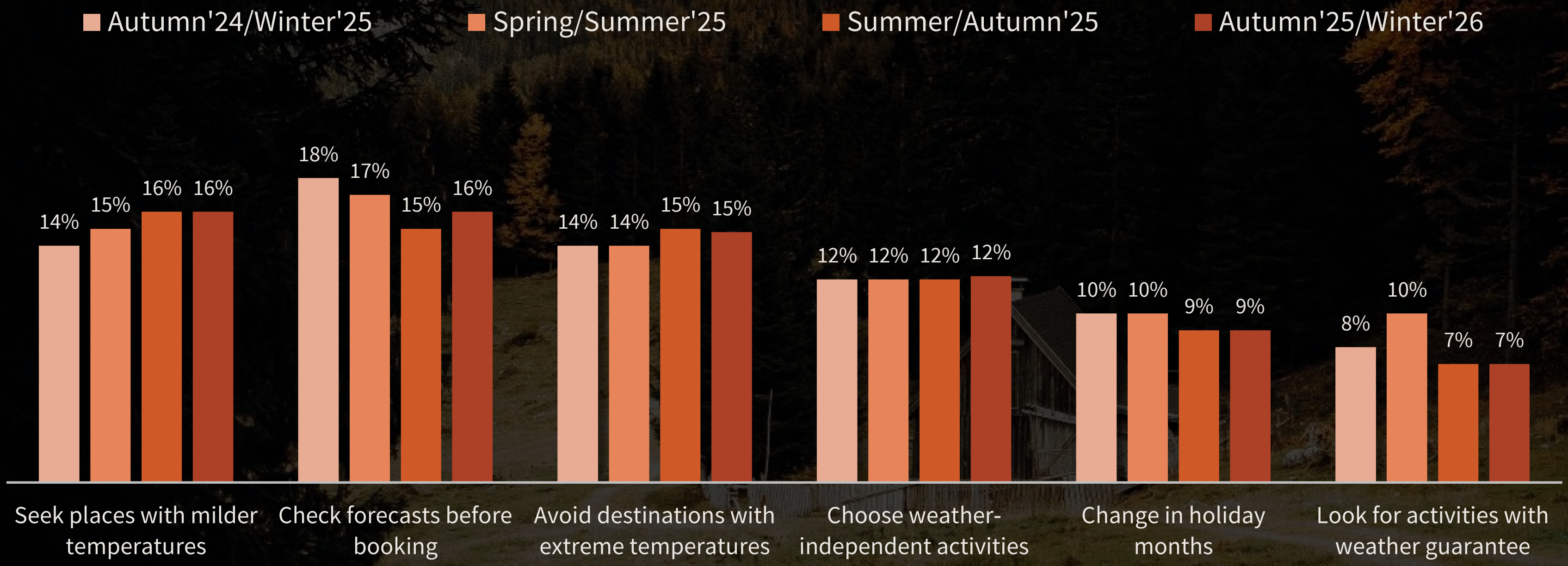
No. of respondents: 5,963

Q23. 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?

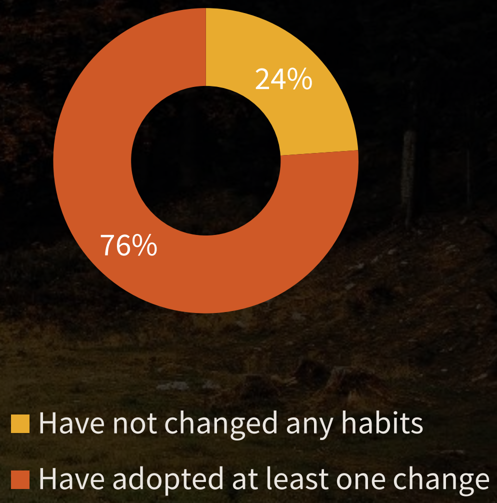
Travel in the era of climate change

More than three in four Europeans adapt their travel plans because of the climate crisis, mainly by picking places with milder weather and checking the forecast before booking

Most popular changes of habits



Does the changing climate impact Europeans' travel habits?



Q22. How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) have been influencing your travel habits?

No. of respondents: 5,963

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 (2023-2024/25)
- Distribution/data collection period:
  - **Wave 19**: 25 May-7 June 2024; sample = 5,955 / **Wave 20**: 07-23 September 2024, sample = 6,001 / **Wave 21**: 3-17 March 2025; sample = 5,974 / **Wave 22**: 27 May-10 June 2025, sample = 6,001 / **Wave 23**: 06-26 September 2025, sample = 5,963
  - **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 (nine questions), and travel intentions, preferences and trip planning (14 questions)
- 50% of the Wave 23 survey respondents are male, and 50% are female. Sample size and age groups are listed below:

Age	Country										Total
	UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
18 - 24	88	70	44	76	34	91	56	58	81	39	637
25 - 34	136	112	73	112	78	152	106	79	87	90	1,025
35 - 44	126	134	103	125	152	151	120	114	121	93	1,239
45 - 54	138	168	105	76	186	168	92	108	89	103	1,233
≥55	262	266	175	111	300	188	126	141	85	175	1,829
Total	750	750	500	500	750	750	500	500	463	500	5,963

- **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

Study on Monitoring Sentiment for Intra-European Travel

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

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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