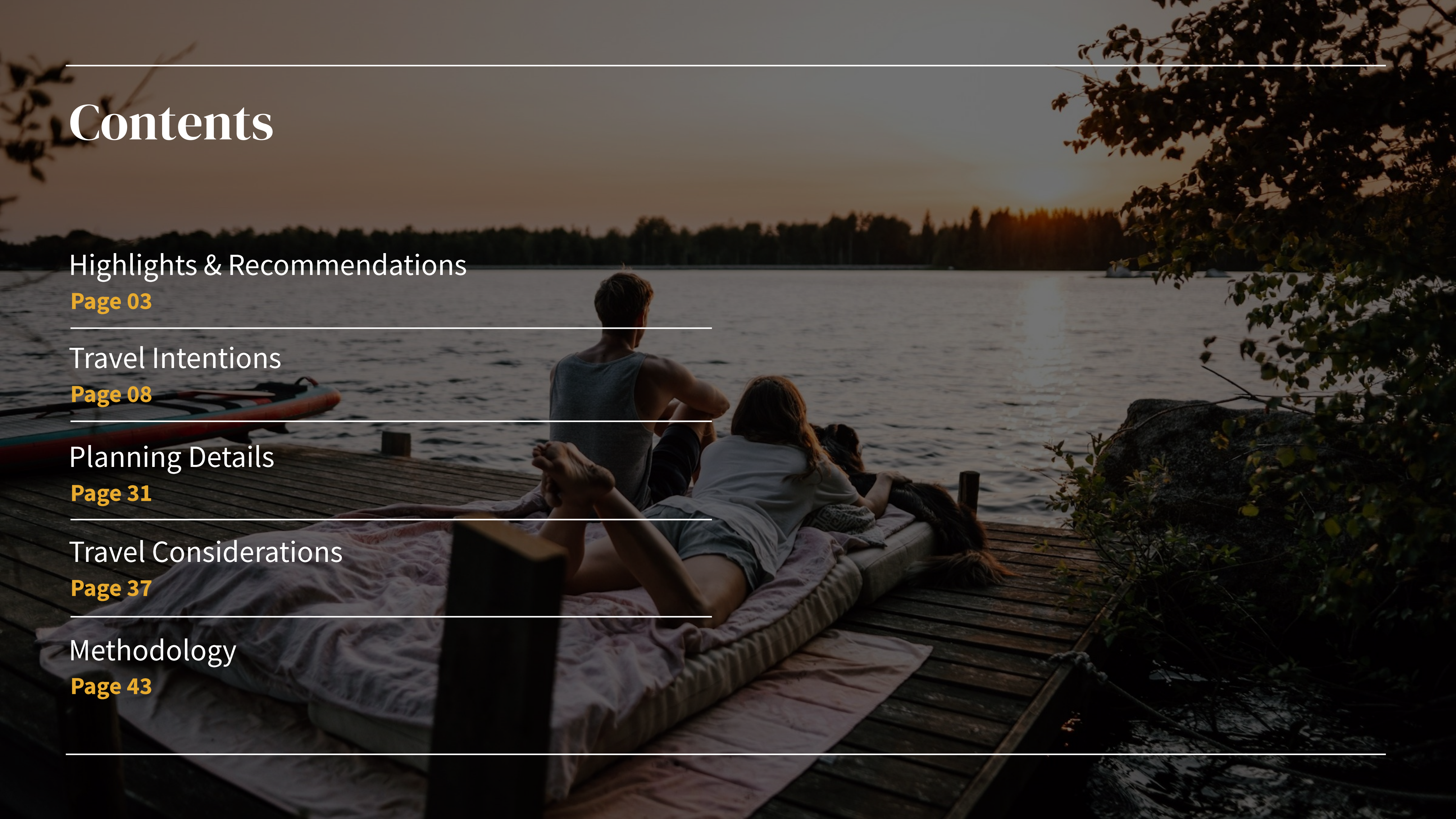
Monitoring Sentiment for Intra-European Travel

Summer & Autumn
2025

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION



Contents

Research highlights

WAVE 22

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

This report is the 22nd update since the series began in September 2020.

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

It focuses on their travel plans between June and November 2025.

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TRAVEL INTENTIONS

- 77% of Europeans plan a trip in the next six months – the highest level of travel intent recorded since the post-Covid surge in December 2022.
- With summer on the way, leisure travel is the leading choice for 76% of Europeans, up by 6% over last summer, while the sentiment for business trips has dipped to 5% (-4%).
- 47% of Europeans consider late-summer getaways in August and September, up by 8% compared to 2024.
- Intra-European travel is the top choice for 65% of the surveyed Europeans. Of those, 33% intend to visit neighbouring countries, while 32% consider non-neighbouring destinations - a noticeable 5% increase from last year.
- Southern and Mediterranean Europe remain the top choice for summer holidays, drawing in 57% of travellers (+7% vs 2024).
- 55% of Europeans plan to holiday in less touristy or off-the-beaten-path destinations, while 45% are heading to well-known tourist hotspots.
- Over half (53%) intend to stay in one location, while 42% are likely to explore multiple spots within the same country.

Comparisons vs a year ago (May 2024)

Research highlights

WAVE 22

TRIP PLANNING

- 43% of travellers anticipate just one getaway over the next six months (+6%), while planning multiple trips has dropped to 53% (-7%) compared to summer 2024.
- A larger share of Europeans (40%) continue to favour trips lasting 7 to 12 nights. Meanwhile, the share of travellers planning to spend mid-to-high range budgets (€1,500–€2,000 per person) has risen notably from 25% last summer to 28% now.
- The perceived safety of a destination (19%), pleasant weather (15%) and attractive deals (14%) top the list of criteria when picking a holiday spot.
- For 32% of European travellers, accommodation is expected to be the most significant expense during their next trip, followed by food and drinks (24%).

TRAVEL CONCERNS AND CONSIDERATIONS

- With peak-season travel costs running high, trip expenses and personal budgets are a key concern for 39% of Europeans, similar to the same season, a year ago.
- Nearly half of European travellers (48%) indicate they would avoid destinations experiencing geopolitical tensions, even if there is no direct threat to their safety.

Comparisons vs a year ago (May 2024)

WAVE 22

Recommendations for destinations

- This summer, 55% of Europeans favour less popular or off-the-beaten-path destinations. To make the most of this growing interest, these places are encouraged to invest in areas such as booking visibility, low-impact tourism infrastructure, clear visitor information, and experience quality, ensuring balanced demand and high visitor satisfaction without compromising authenticity.

- With about half of Culture & Heritage travellers planning multi-stop itineraries, destinations should facilitate partnerships between towns, cultural sites, and transport operators ahead of the season, to offer more seamless, curated experiences that reflect actual travel patterns. Such a strategy would support smarter visitor flows, ease pressure on hotspots, and ensure cultural value is shared more evenly without increasing volumes.

- As safety becomes even more of a priority (+3%), destinations would benefit from visibly reinforcing their security measures, through clearly identified tourism police and health-related services, well-marked emergency signage, access to fast and reliable internet and multilingual support staff in high-traffic areas.

- With climate change increasingly influencing travel decisions, destinations prone to extreme weather conditions should further develop weather-resilient experiences. This could include shifting opening hours to cooler parts of the day and investing in cooling infrastructure, like shaded rest areas, water stations, and green spaces, designed not only for visitors but also to support residents and businesses operating in high temperatures. Destinations can also promote shoulder-season travel or cooler micro-regions to help spread demand, while coordinating with businesses and transport providers to adapt services during periods of extreme heat.

Recommendations for businesses

- With more travellers choosing to travel in September, businesses have a timely opportunity to sustain late-season demand. Prioritising staff retention through flexible scheduling, short-term contract extensions, or end-of-season incentives is key to maintaining service quality. Keeping core amenities, attractions, and services like transport, guided tours, and food outlets running is equally important, avoiding the common pitfall of scaling down too early. Close collaboration with DMOs could also help position September as a valuable and vibrant part of the tourism calendar.

- Destinations such as Spain, Italy, and France attract a high share of repeat visitors, giving local businesses a valuable opportunity to run targeted direct marketing campaigns. Through newsletters and email outreach, companies can promote shoulder-season offers or highlight sister properties within their portfolio, thus encouraging return visits to different spots.

- For businesses offering local activities, from cooking classes and city tours to guided nature walks, Gen Z travellers (aged 18–24) represent a high-potential segment as they are more interested than the average traveller in getting involved. To convert this interest into bookings, businesses should prioritise mobile-first booking, a strong social media presence, and flexible, affordable offers. Engaging this group can help generate organic visibility and foster long-term loyalty.

- As car travel picks up speed (+4%), on-route businesses can transform passersby into guests by offering ‘stop and discover’ moments, complete with restful stays, authentic local food, and warm hospitality that transforms a drive into a destination.

WAVE 22

Reading the data

Data collection periods

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
Wave 18	2-17 April 2024

Travel timings for Wave 22

Use these time periods as a reference for the desired travel period:

In 1-2 months:	June-July 2025
In 3-4 months:	August-September 2025
In 5-6 months:	October-November 2025

Analysed samples

- Total respondents: 6,001
- Respondents most likely to travel in the next six months: 4,635
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 4,715

Significant changes

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

Increase ▲ Decrease ▼

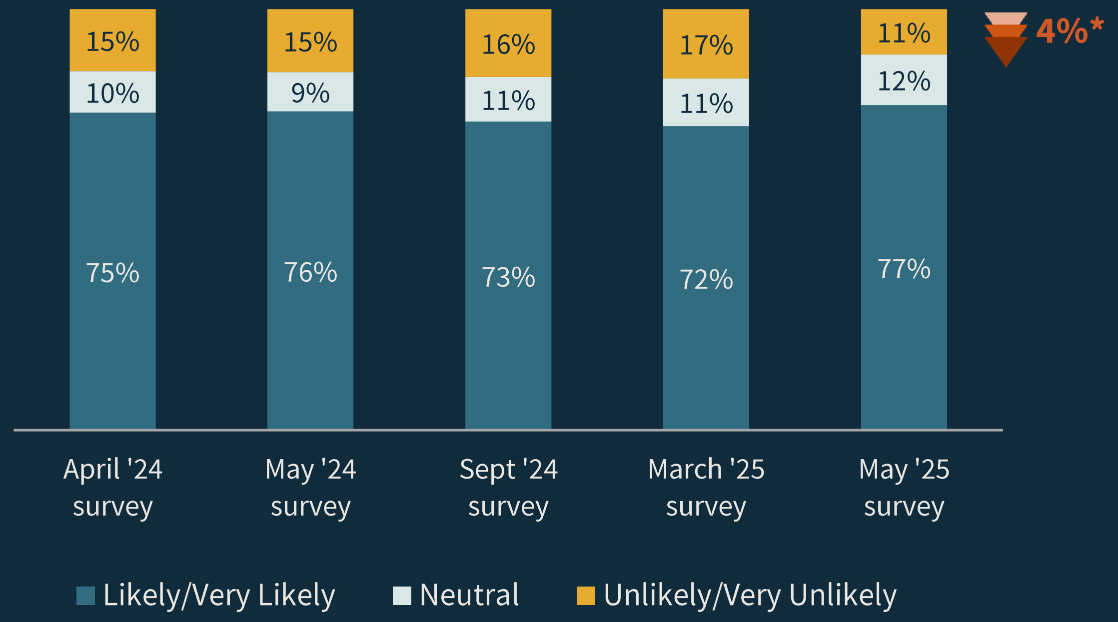
All data and insights refer to domestic and intra-European travel unless otherwise stated.

Travel intentions

01

77% of Europeans plan to travel in the coming six months

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

SPAIN

85% 4%*

ITALY

84% 3%*

NETHERLANDS

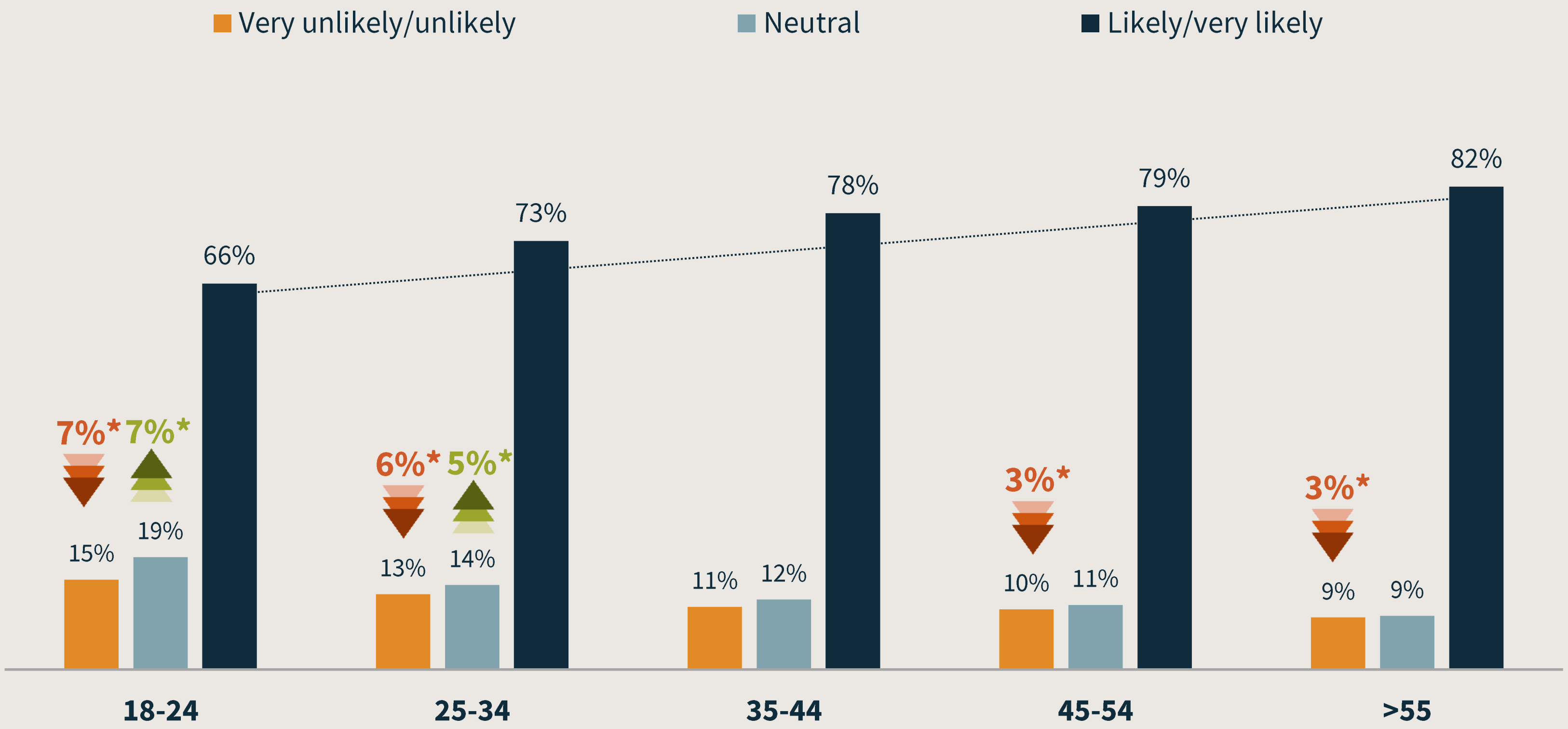
83% 6%*

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

No. of respondents: 6,001

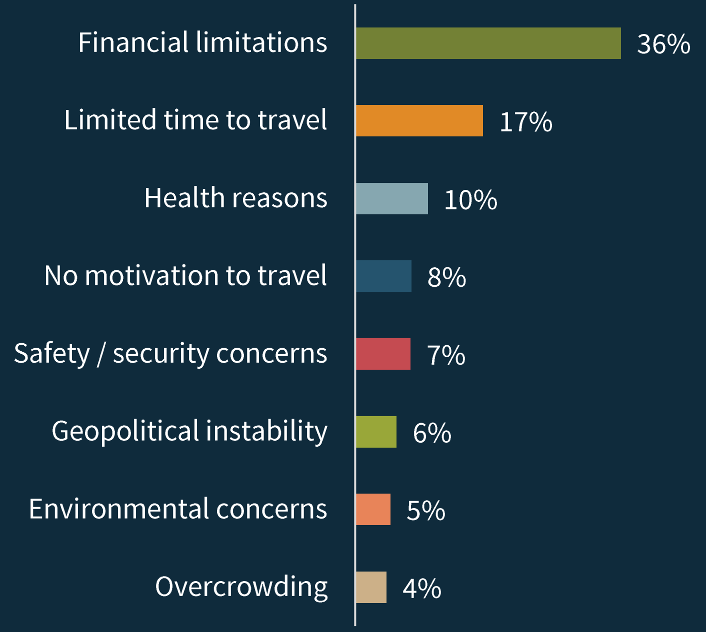
Travel reluctance drops across age groups. Europeans over 34 lead in travel intent

Intention to travel in the next six months by age group



No. of respondents: 6,001

Key barriers to travel



No. of respondents: 639

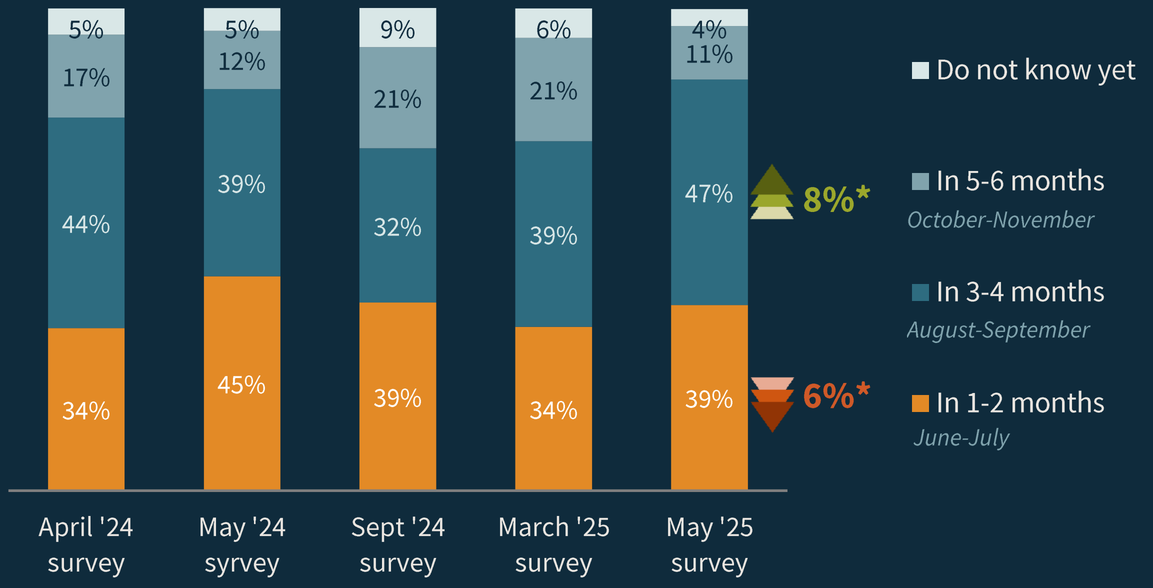
Travellers aged 18–24 most frequently cite financial limitations as a barrier to travel (36%), consistent with other age groups. However, a greater share of them indicate time constraints (23% vs 17% in the total sample), while fewer mention health-related reasons (8% vs. 10%).

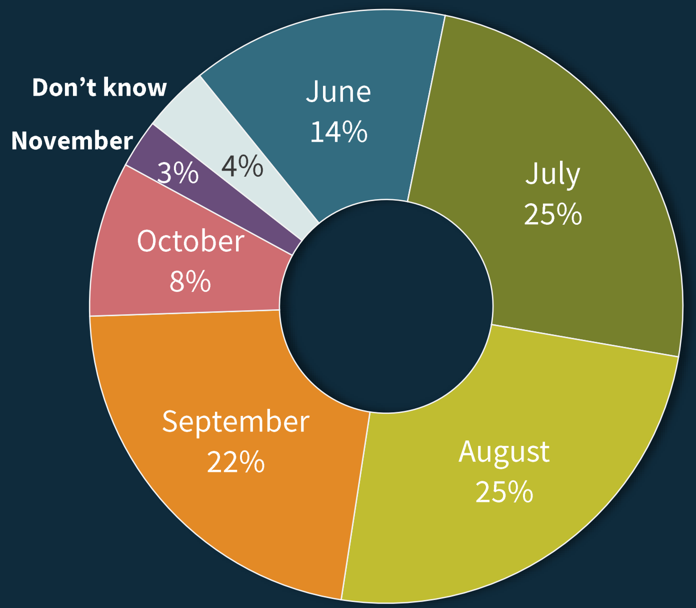
* Statistically significant difference vs a year ago (May 2024)

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

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

A growing share of Europeans are favouring summer holidays in August or September, over trips in June or July





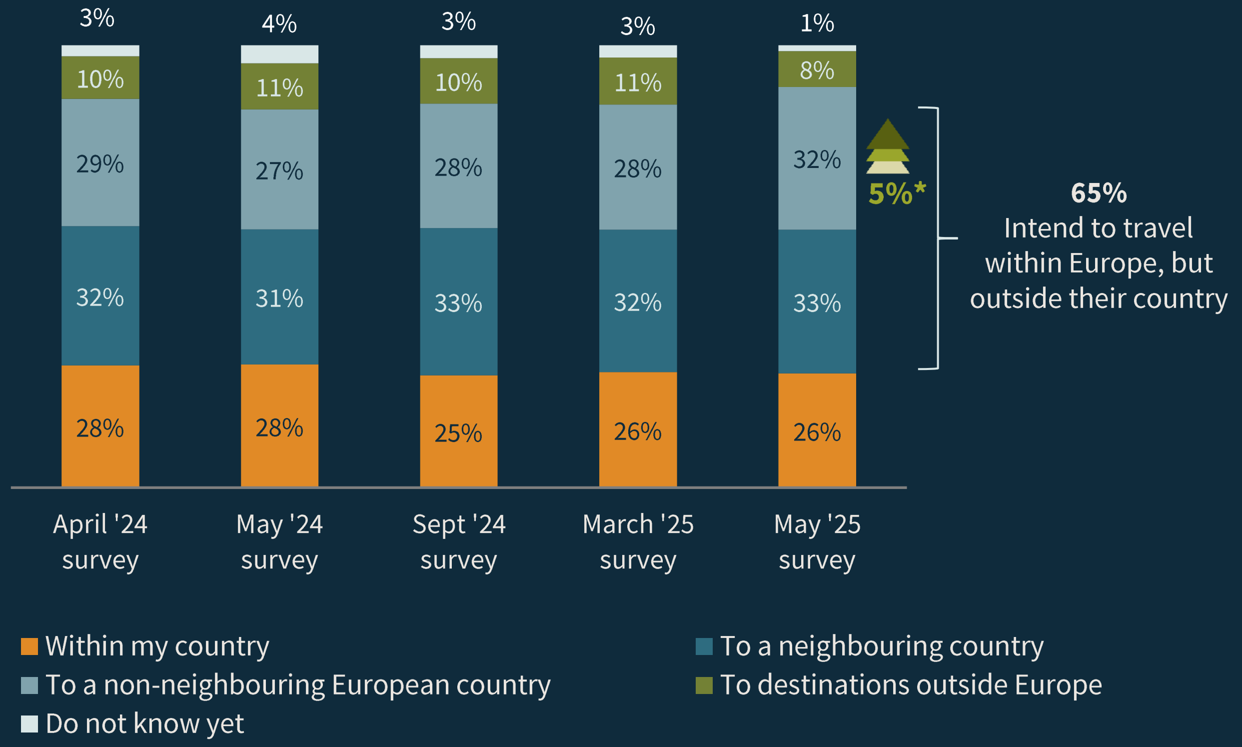
Q9. When are you most likely to go on your next trip either in your country or within Europe?

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

No. of respondents: 4,635

Interest in visiting non-neighbouring destinations within Europe is higher this summer (+5%)

Where will Europeans travel within the next six months?

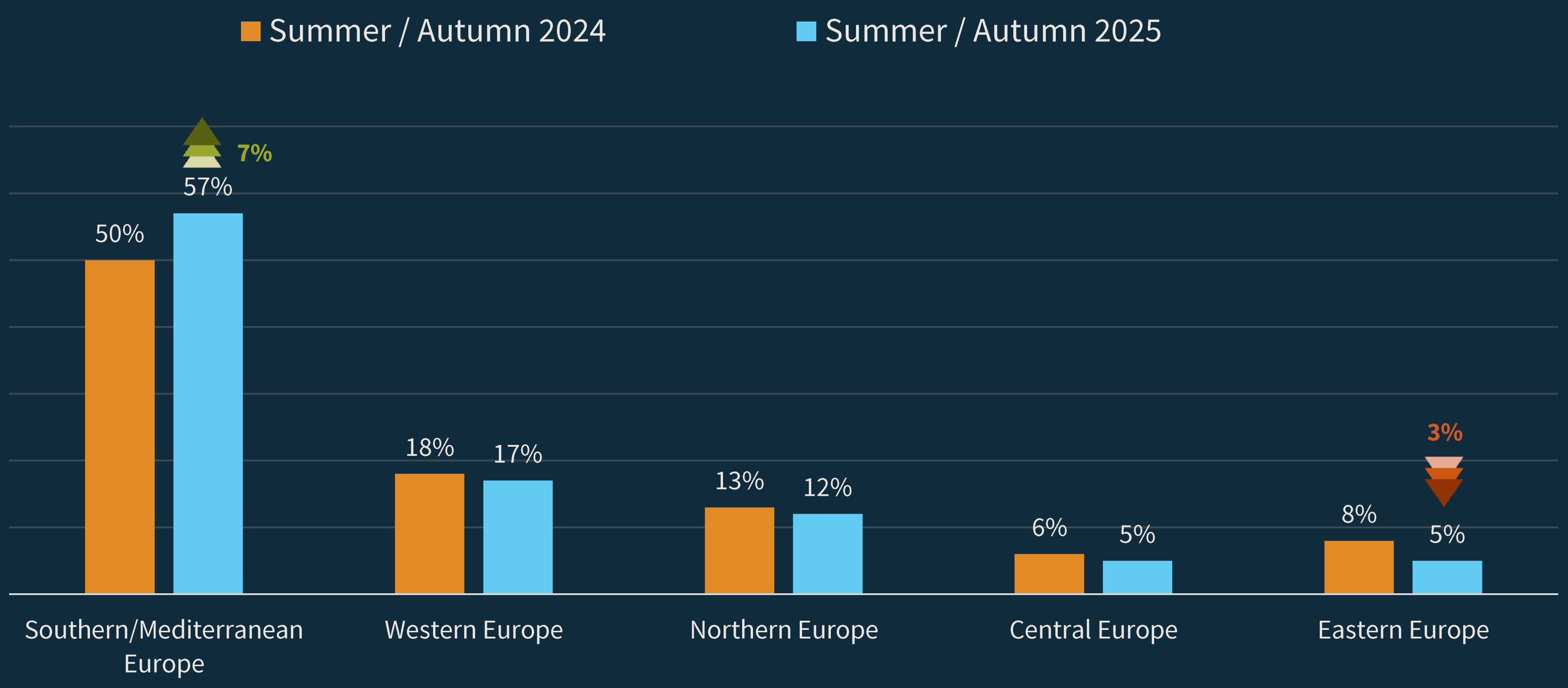


Q10. Where do you plan to travel in the next six months?

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

No. of respondents: 4,635

Southern/ Mediterranean destinations top summer travel plans, with a 7% increase compared to summer 2024



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

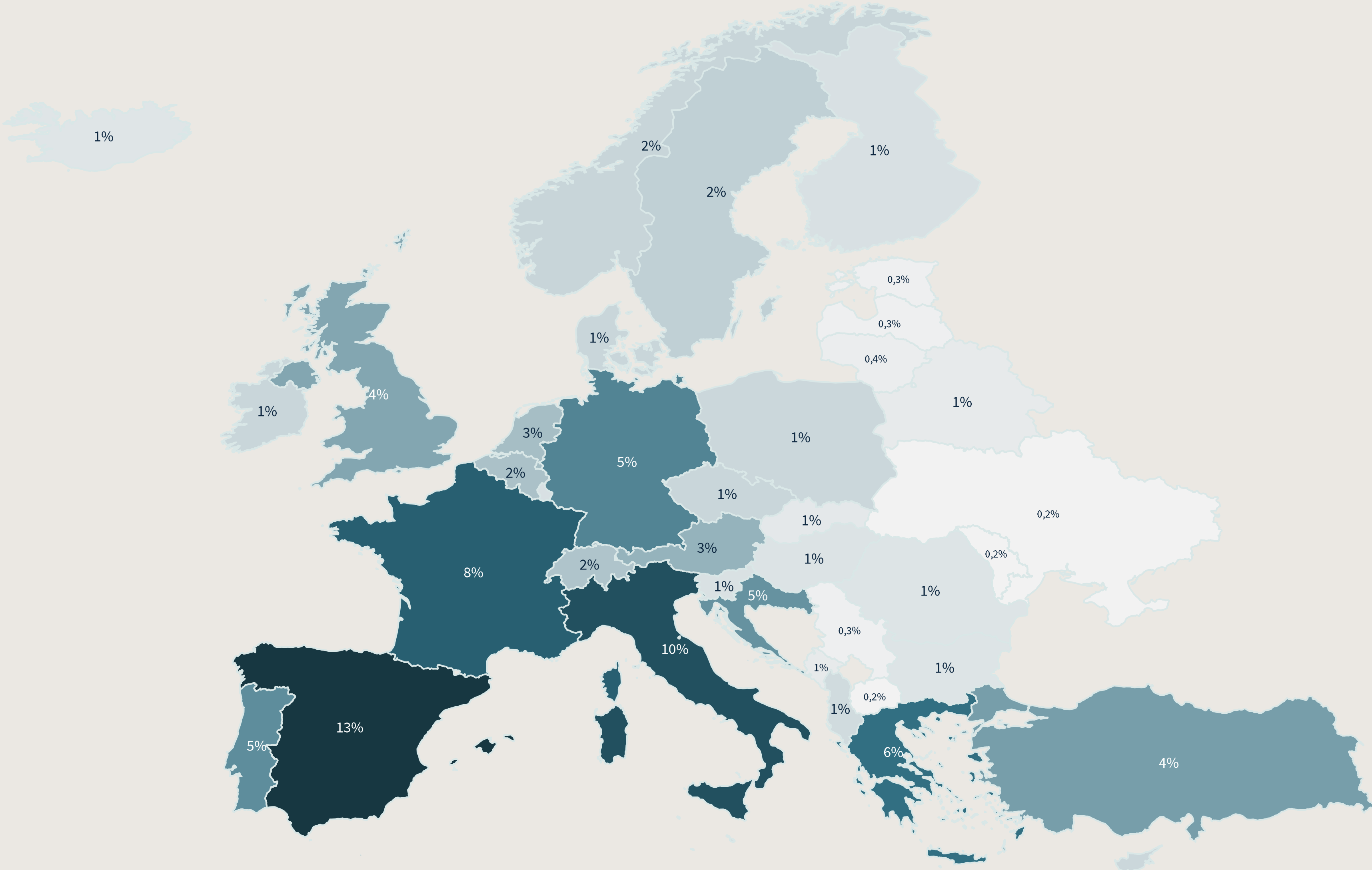
No. of respondents: 4,715

Preferred countries for the next intra-European trip

Horizon June-November ‘25

TOP 10 COUNTRIES

Spain	**13%**	▲ 5%
Italy	**10%**	
France	**8%**	
Greece	**6%**	
Germany	**5%**	
Portugal	**5%**	
Croatia	**5%**	
Türkiye	**4%**	
UK	**4%**	
Austria	**3%**	



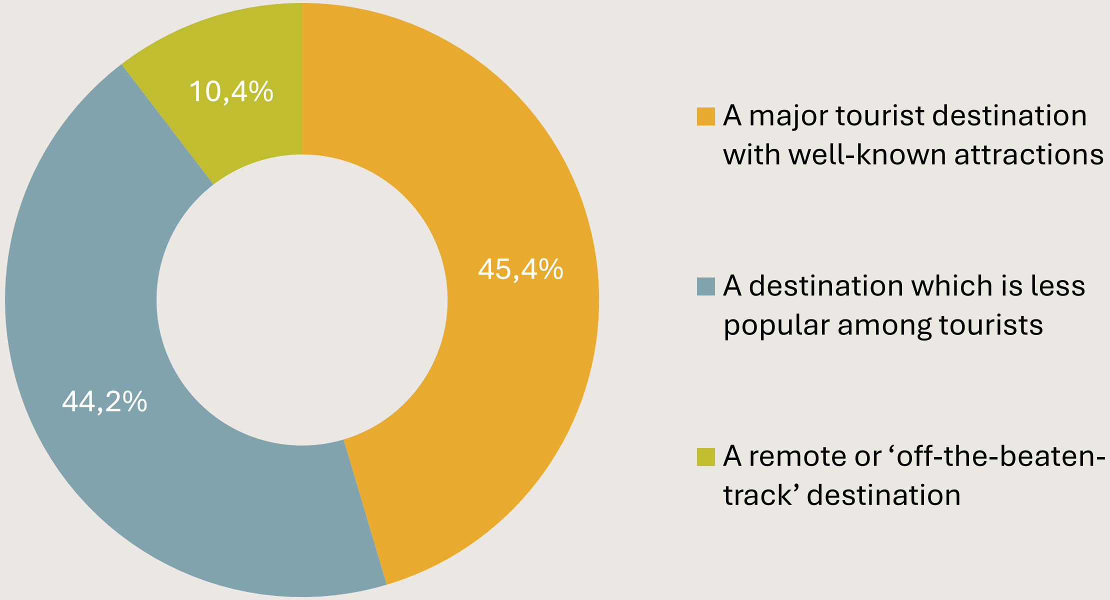
Q12. To which country(ies) do you plan to travel next?

No. of respondents: 4,715

55% of travellers choose less popular or off-the-beaten-track destinations

45% of travellers will head to major tourist destinations, a -7% drop compared to March 2025

Type of destination for the coming trip



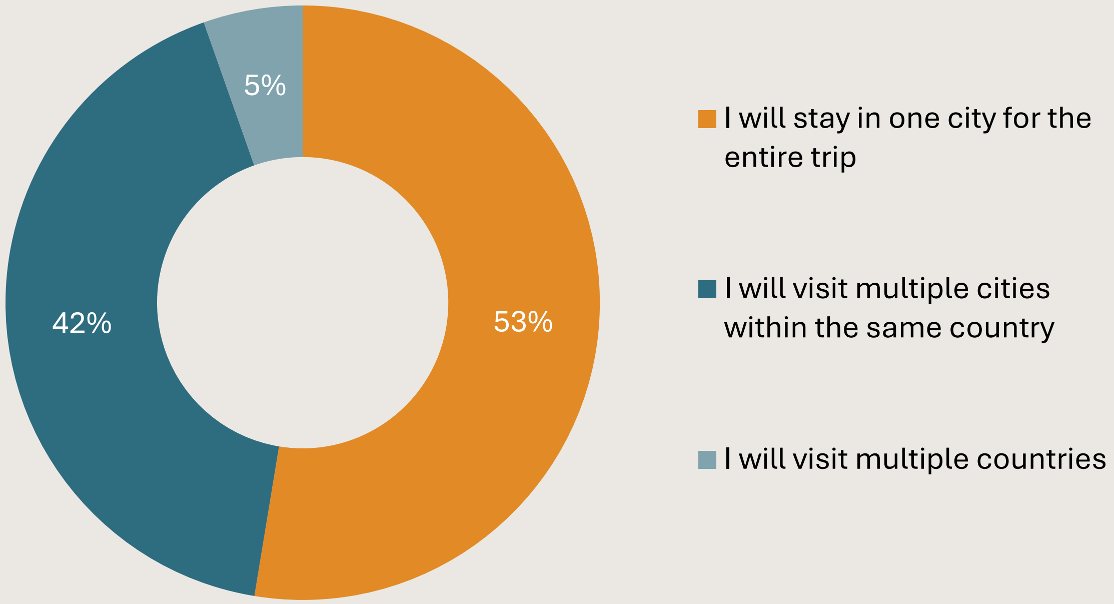
Q13. Thinking of the next country you intend to visit, in what type of destination, within it, do you plan to spend most of your time?

No. of respondents: 4,635

Top five markets favouring tourism hotspots		Top five markets favouring lesser-known or remote locations	
UK	55%	Austria	62%
Italy	51%	Belgium	60%
France	48%	Netherlands	60%
Germany	46%	Poland	59%
Spain	46%	Switzerland	59%

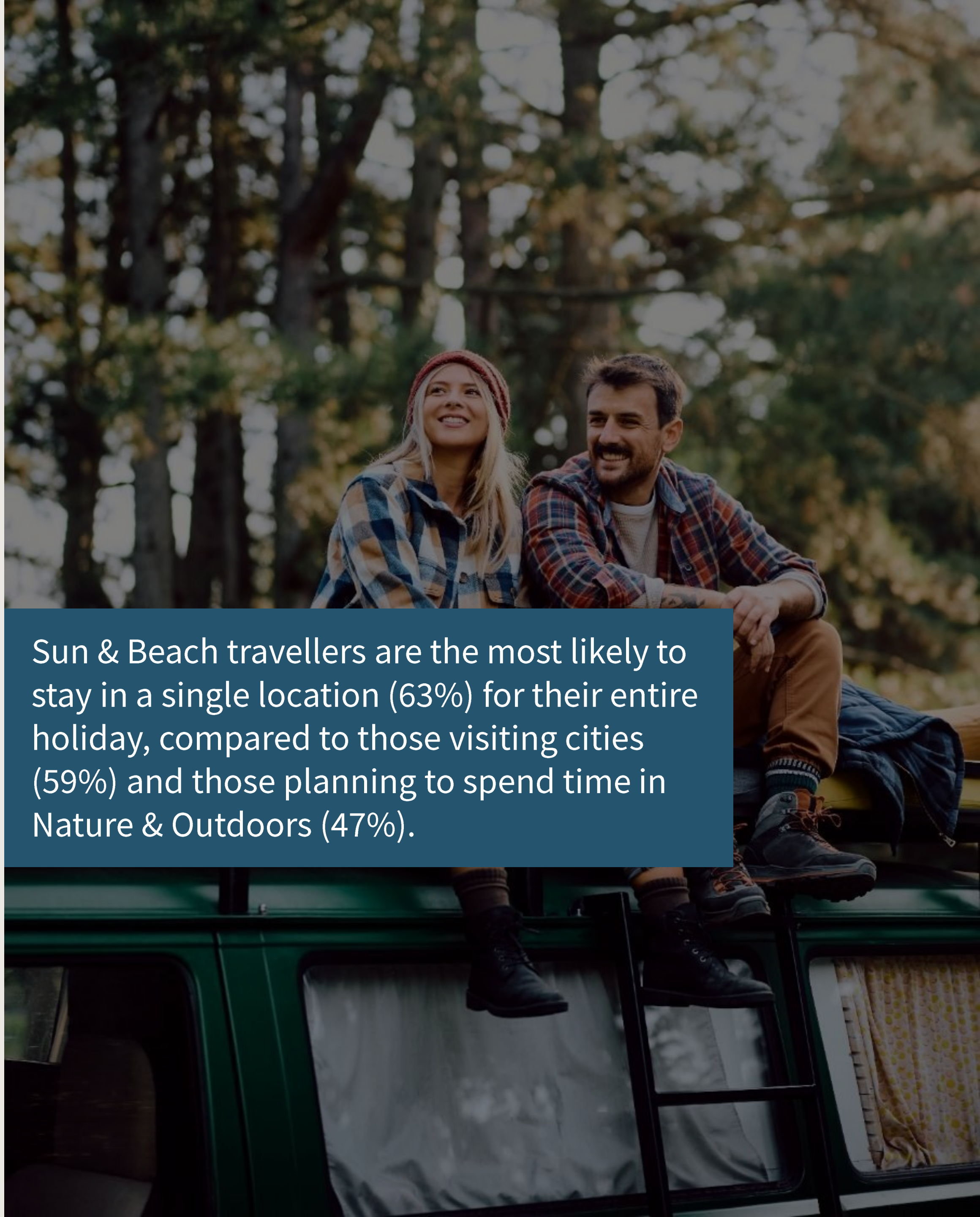
53% of Europeans plan to spend their holiday in a single location, while another 42% will visit multiple places within the same country

Planned itinerary for the next trip



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

No. of respondents: 4,635



Sun & Beach travellers are the most likely to stay in a single location (63%) for their entire holiday, compared to those visiting cities (59%) and those planning to spend time in Nature & Outdoors (47%).

Travellers’ patterns by destination type

Major tourist destination

Popular destinations with well-known attractions

Less popular destination

Destinations that are less popular among tourists

Off-the-beaten-track destination

Remote destinations, with minimal tourist infrastructure

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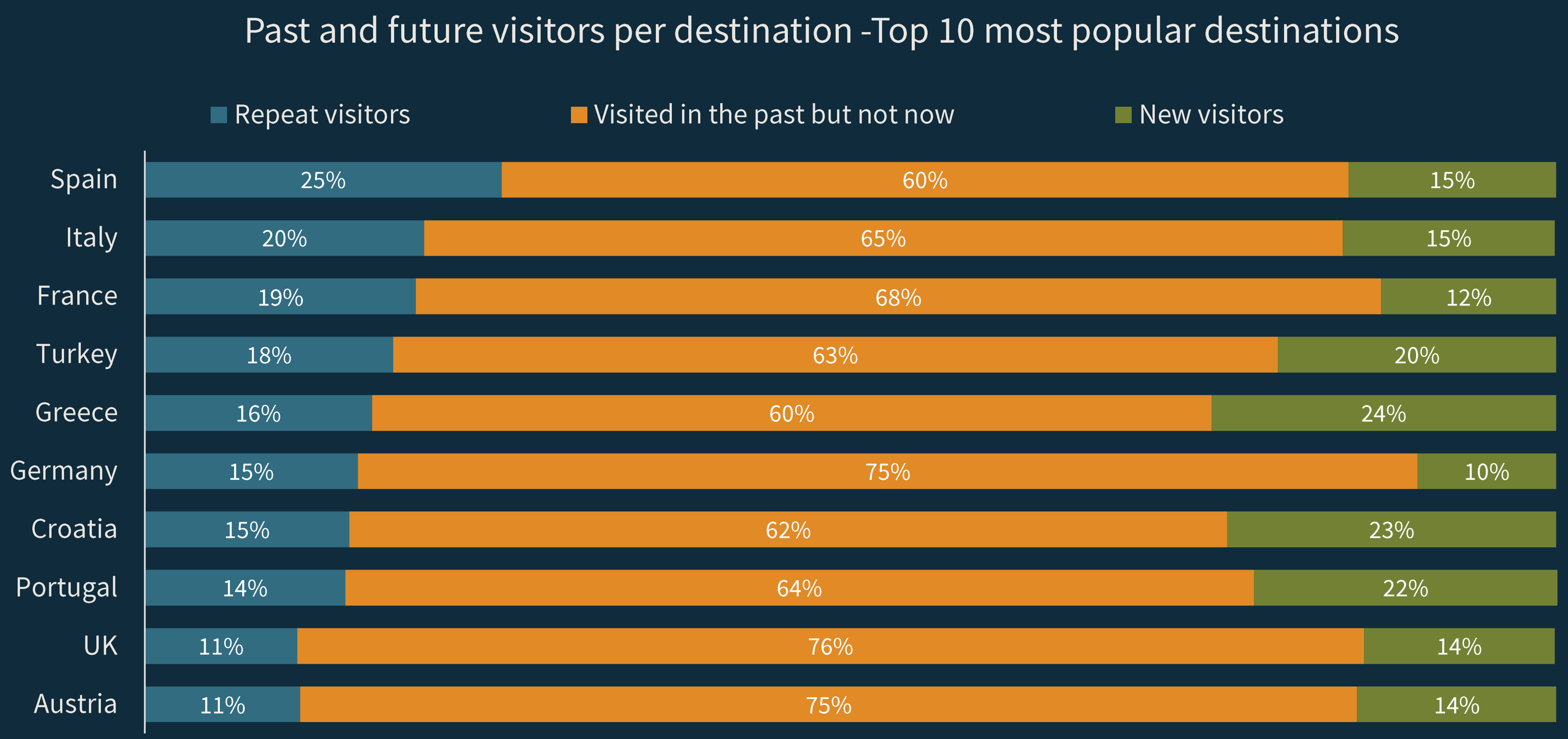
No. of respondents: 4,635

Spain, Italy and France draw the most repeat visitors, while Greece, Croatia and Portugal appeal to first-time travellers

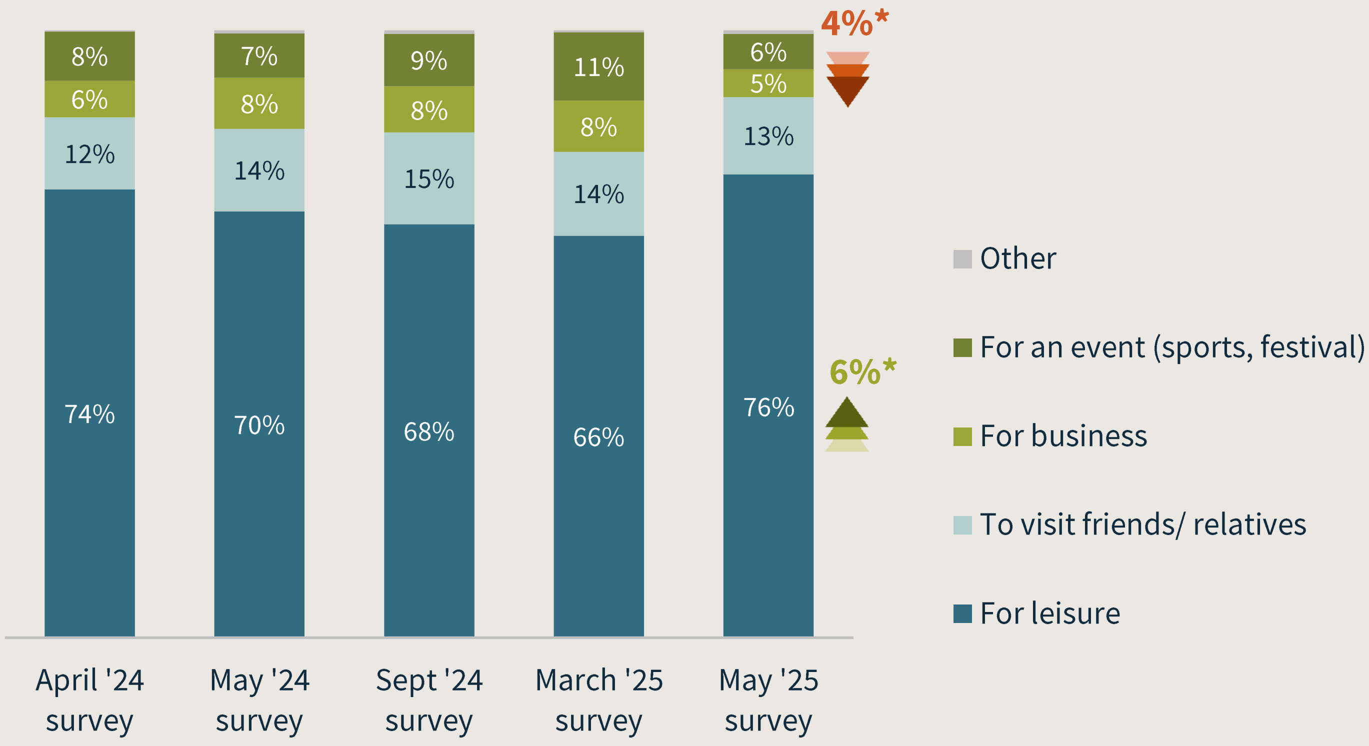


Q1. Which European countries have you visited in the past three years (2023-20234/25)?
Q12. To which country(ies) do you plan to travel next?

NOTE: The sample includes respondents with past experience or future intentions to visit the destinations. It excludes domestic travellers. Total No. of cases: 7,120

As summer nears, leisure travel surges (+6%) while business travel declines (-4%)

Purpose of travel



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

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

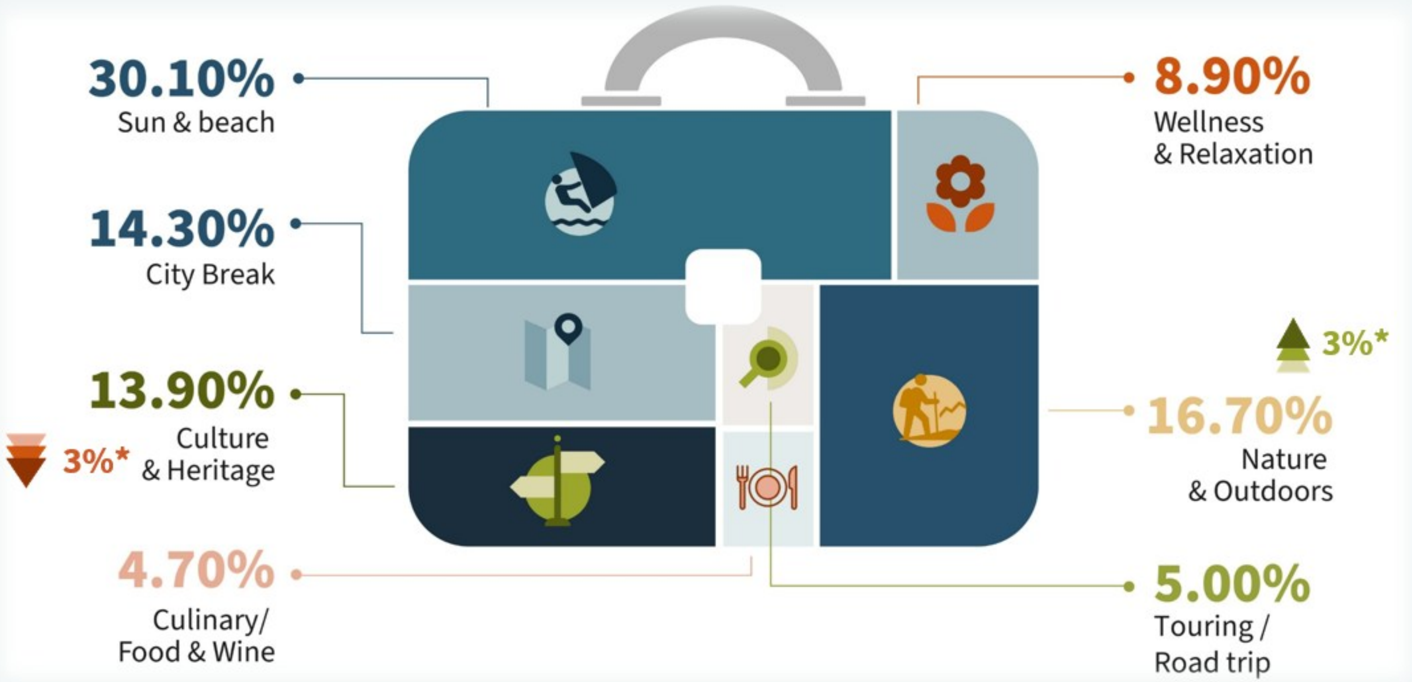
No. of respondents: 4,635

Top three markets to take a leisure trip	Top three markets to take a business trip
Netherlands 85%	Austria 7% ▲ 8%*
Belgium 83%	UK 6%
Poland 83% ▼ 8%*	Germany 5%

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

Sun & Beach leads Europeans’ summer travel choices, while interest in Nature & Outdoors trips grows

Preferred type of leisure trip in the next six months

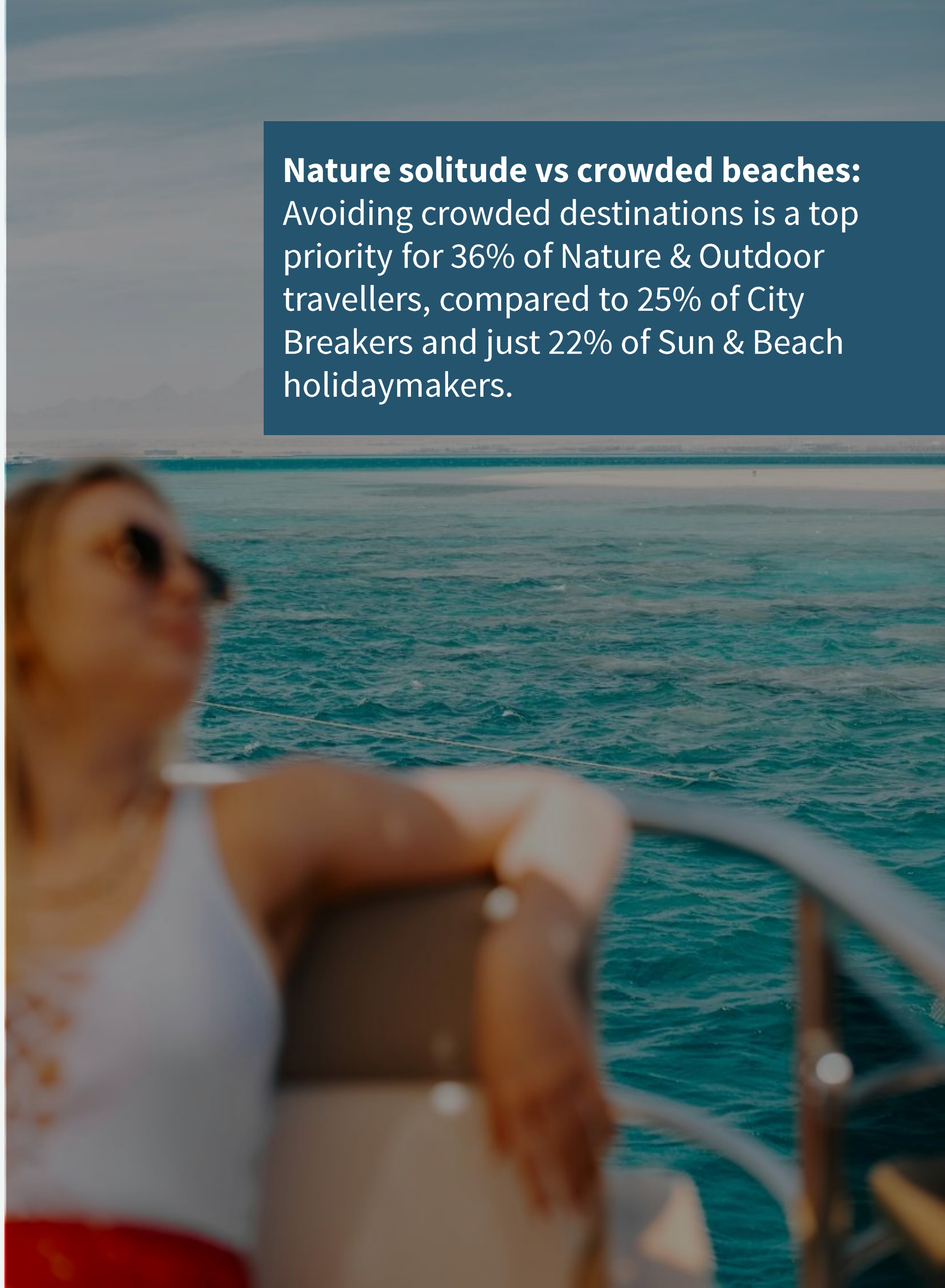


NOTE: Please note that, due to changes in coastal travel classifications in the 2025 survey questionnaire, the value for “Sun & Beach” is not directly comparable with the values reported in previous editions of this research.

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

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

No. of respondents: 4,635

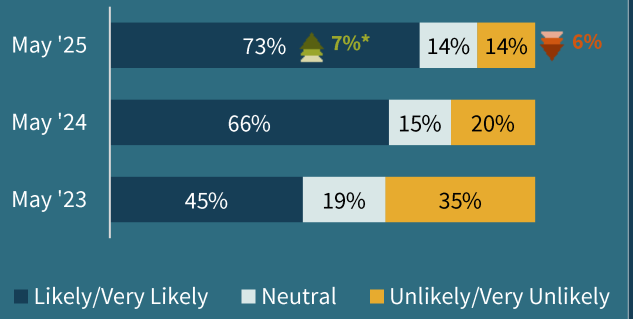


Nature solitude vs crowded beaches: Avoiding crowded destinations is a top priority for 36% of Nature & Outdoor travellers, compared to 25% of City Breakers and just 22% of Sun & Beach holidaymakers.

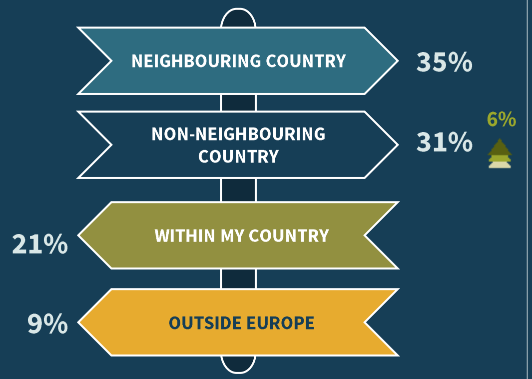
Austrians' travel plans

Travel horizon: June-November 2025

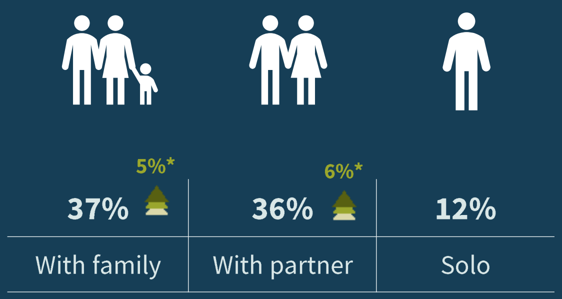
INTENTION TO TRAVEL



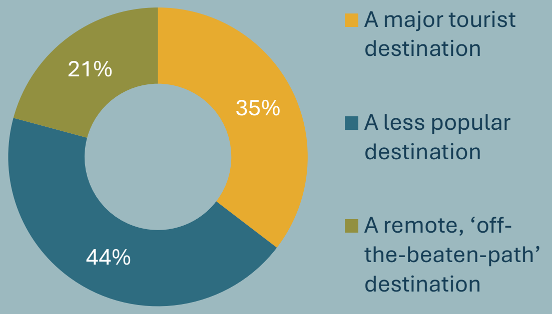
WHERE TO?



TRAVELLING WITH?



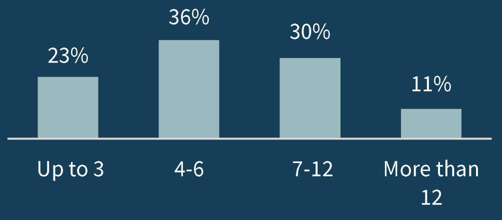
TYPE OF DESTINATION

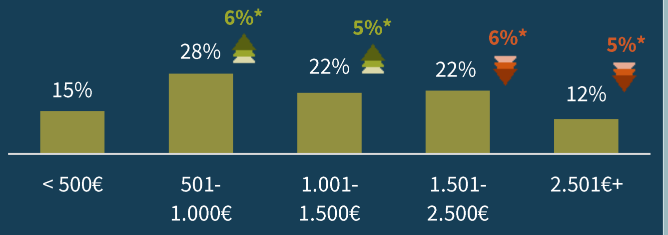


TOP SPENDING PRIORITIES

34%	Accommodation
22%	Food & Drinks
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	15% (5%*)
Croatia	12% (4%*)
Spain	9%
Germany	7%
Greece	6%

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

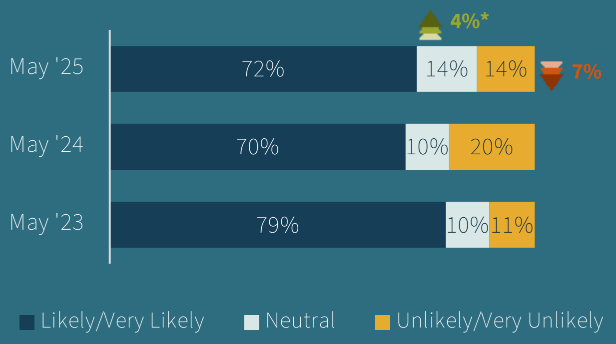
* Statistically significant difference vs a year ago (May 2024)

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

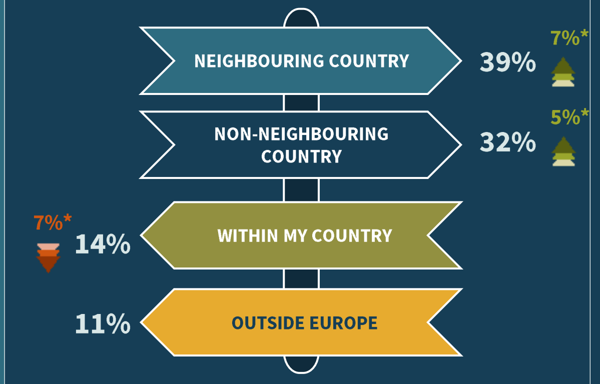
Belgians' travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



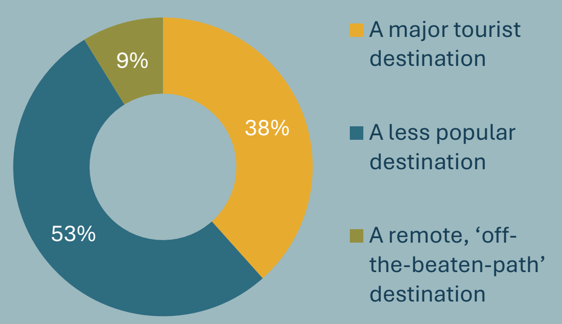
WHERE TO?



TRAVELLING WITH?

With partner	With family	Solo
41% (10%*)	34% (6%*)	10%

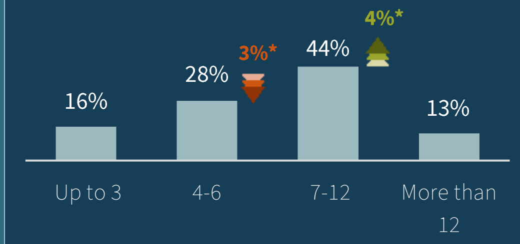
TYPE OF DESTINATION

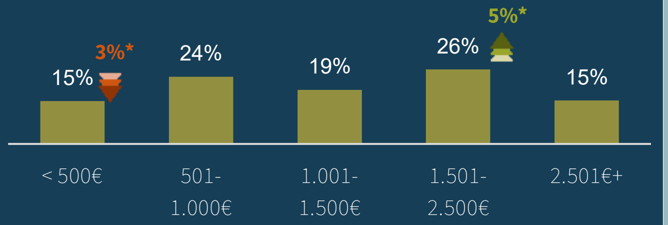


TOP SPENDING PRIORITIES

31%	Accommodation
27%	Food & Drinks
14%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	20% (7%*)
Spain	13% (5%*)
Italy	8%
Greece	6%
Türkiye	6%

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

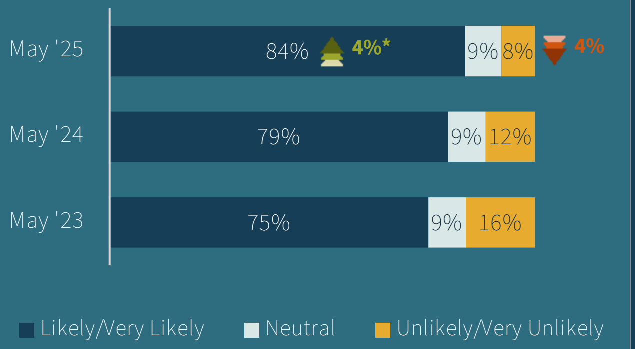
* Statistically significant difference vs a year ago (May 2024)

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

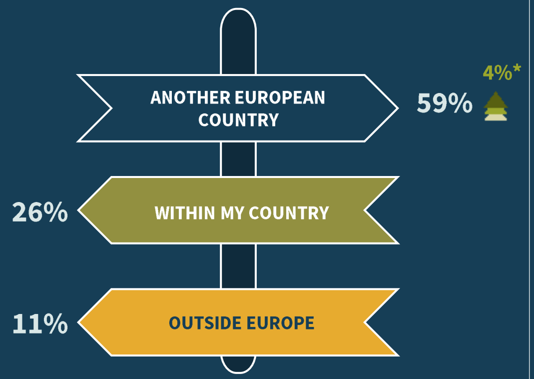
Britons' travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



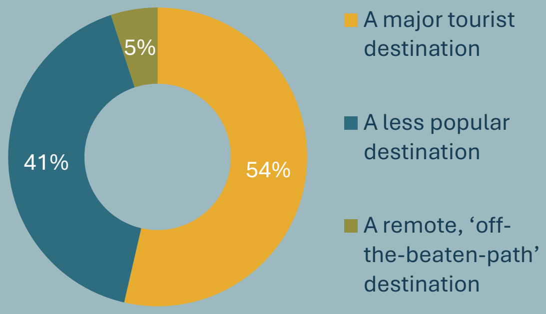
WHERE TO?



TRAVELLING WITH?

41% (5%*)	34%	13%
With family	With partner	Solo

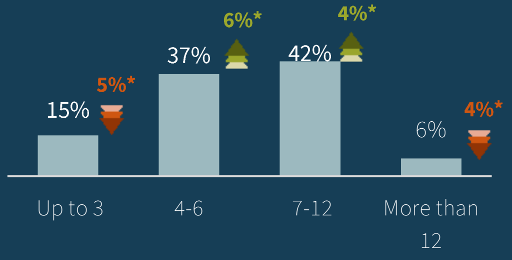
TYPE OF DESTINATION

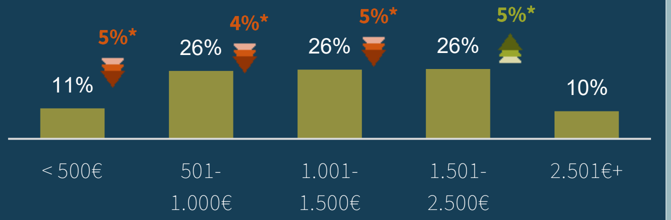


TOP SPENDING PRIORITIES

30%	Accommodation
25%	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	
Spain	18%	4%*
Italy	8%	
Greece	8%	
France	7%	4%*
Portugal	6%	

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

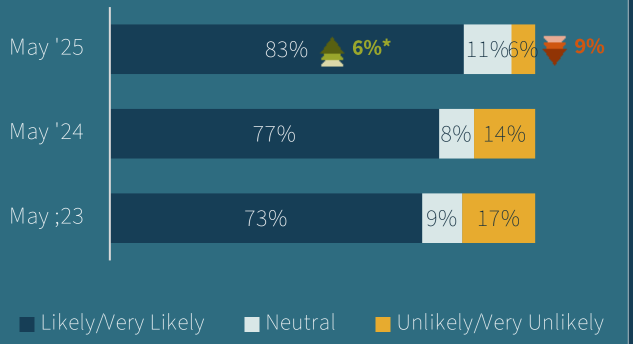
* Statistically significant difference vs a year ago (May 2024)

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

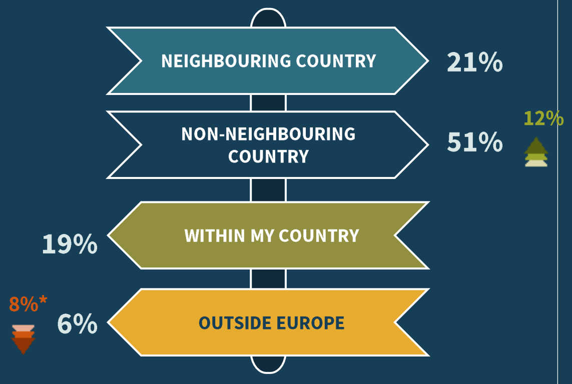
Dutch travel plans

Travel horizon: June-November 2025

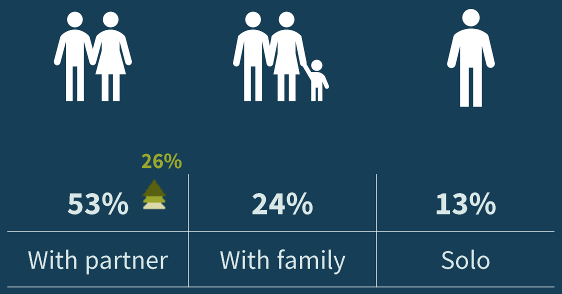
INTENTION TO TRAVEL



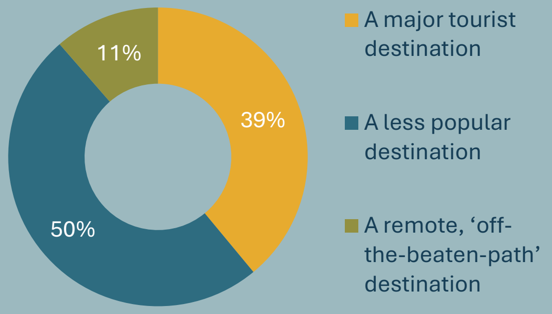
WHERE TO?



TRAVELLING WITH?



TYPE OF DESTINATION

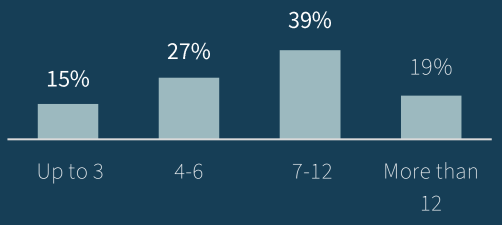


TOP SPENDING PRIORITIES

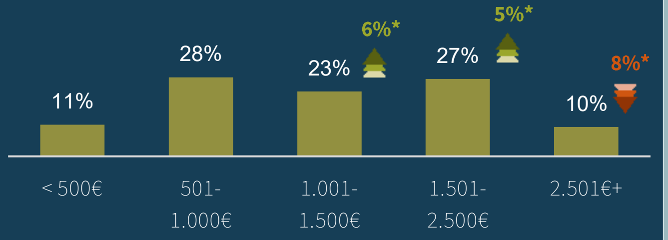
32%	Accommodation
28%	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	18% (10%)
Germany	11%
France	10%
Italy	8%
Greece	7%

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

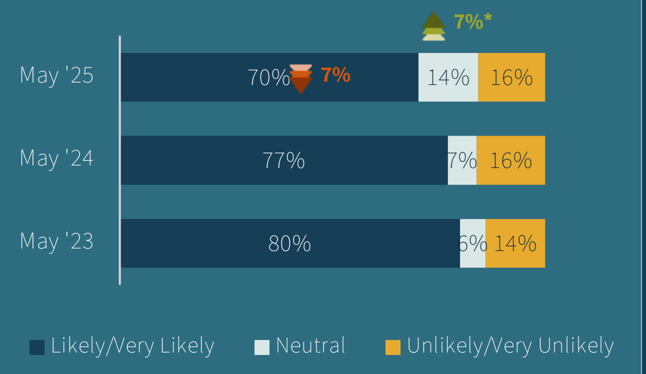
* Statistically significant difference vs a year ago (May 2024)

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

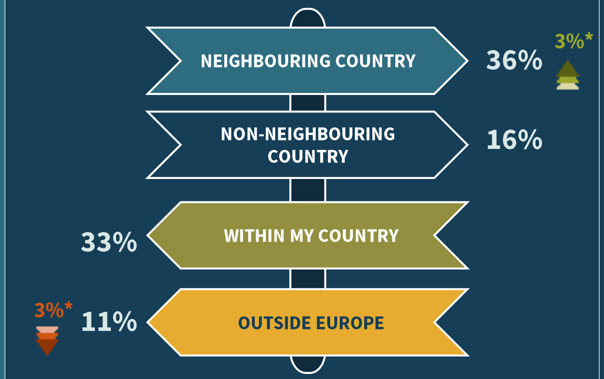
French travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



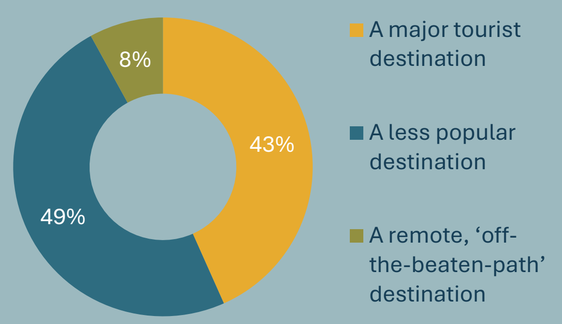
WHERE TO?



TRAVELLING WITH?

39%	37%	11%
With partner	With family	Solo

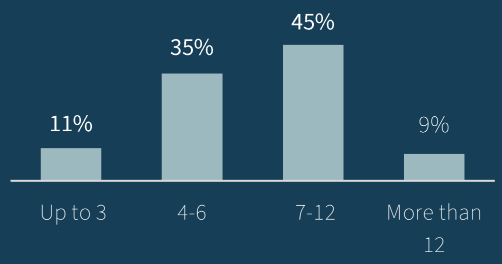
TYPE OF DESTINATION

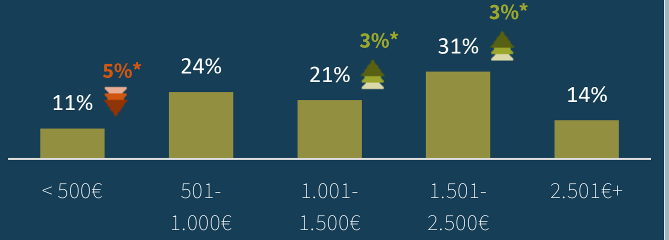


TOP SPENDING PRIORITIES

30%	Accommodation
19%	Food & Drinks
18%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	14% 6%*
Italy	12%
Portugal	7%
Greece	6%
Croatia	5%

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

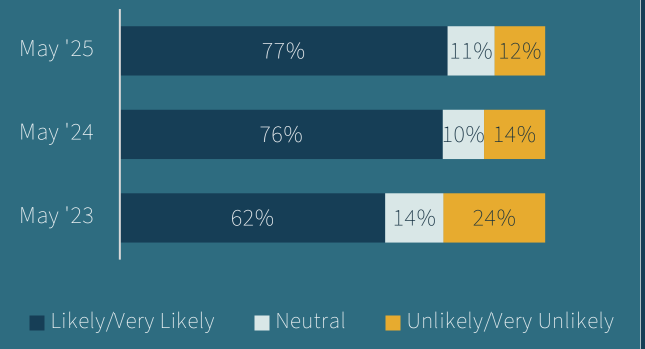
* Statistically significant difference vs a year ago (May 2024)

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

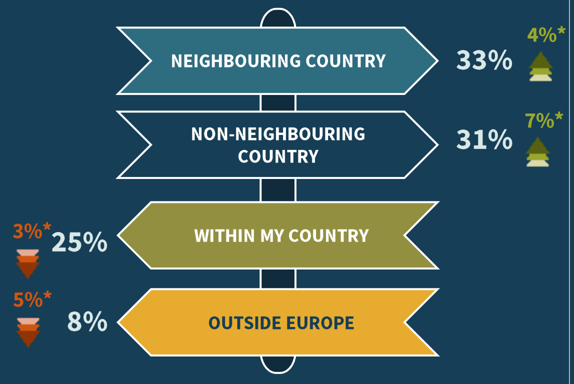
Germans’ travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



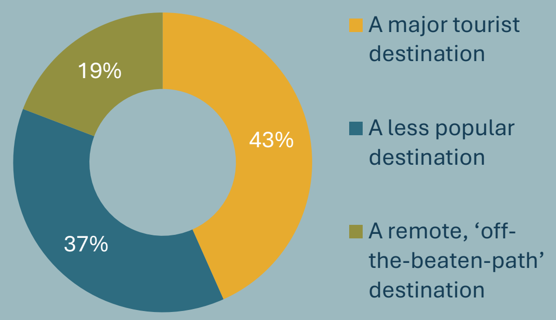
WHERE TO?



TRAVELLING WITH?

With family	With partner	Solo
39% (3%*)	32% (3%*)	15%

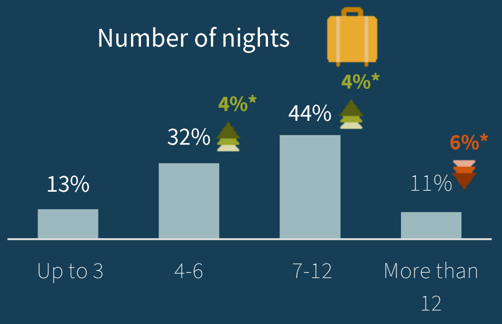
TYPE OF DESTINATION

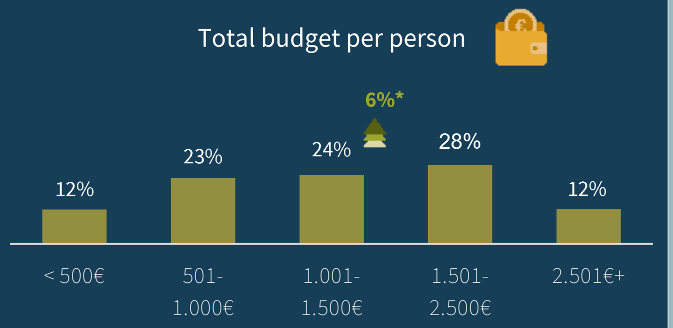


TOP SPENDING PRIORITIES

34%	Accommodation
21%	Food & Drinks
16%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	12% (4%*)
Italy	10% (3%*)
Austria	8%
Türkiye	7%
Greece	6%

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

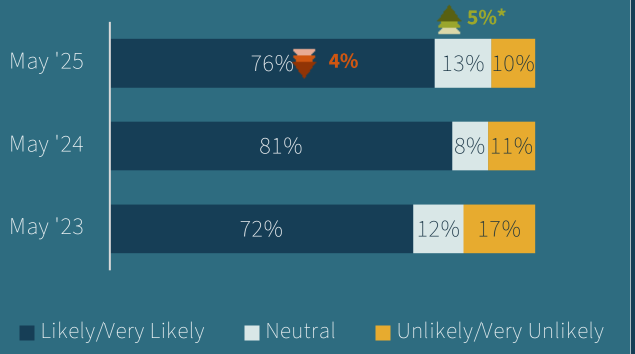
* Statistically significant difference vs a year ago (May 2024)

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

Italians' travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



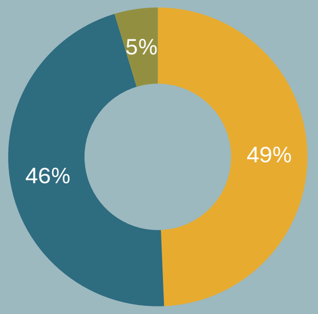
WHERE TO?

NEIGHBOURING COUNTRY	22%
NON-NEIGHBOURING COUNTRY	33% (5%*)
WITHIN MY COUNTRY	36%
OUTSIDE EUROPE	6%

TRAVELLING WITH?

With partner	With family	Solo
37%	36%	10% (3%*)

TYPE OF DESTINATION



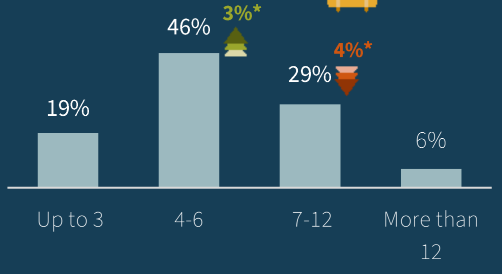
- A major tourist destination
- A less popular destination
- A remote, 'off-the-beaten-path' destination

TOP SPENDING PRIORITIES

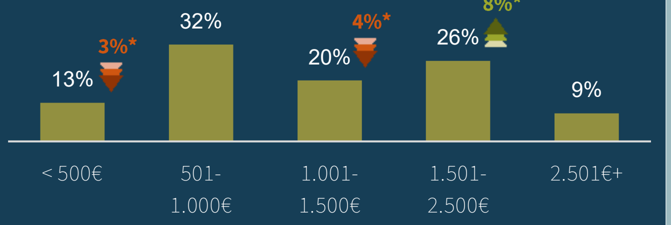
28%	Accommodation
22%	Food & Drinks
17%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	17% (5%*)
France	11%
UK	6%
Greece	5%
Portugal	5%

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

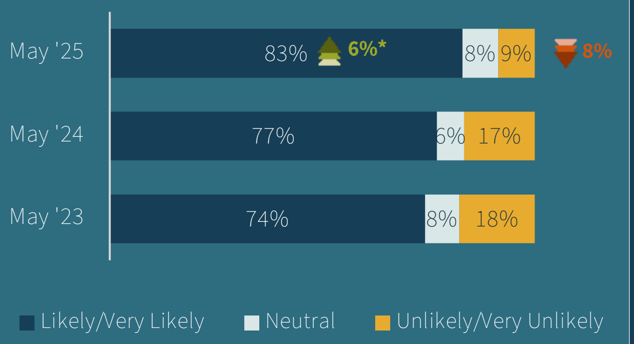
* Statistically significant difference vs a year ago (May 2024)

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

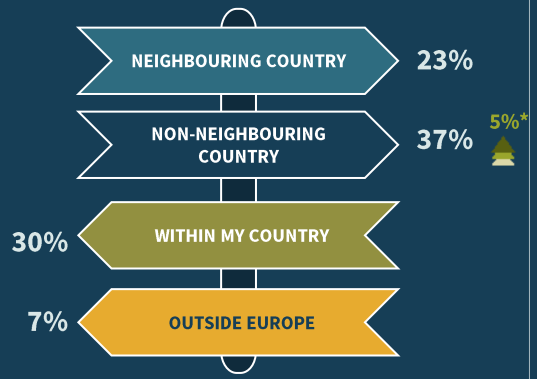
Poles' travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



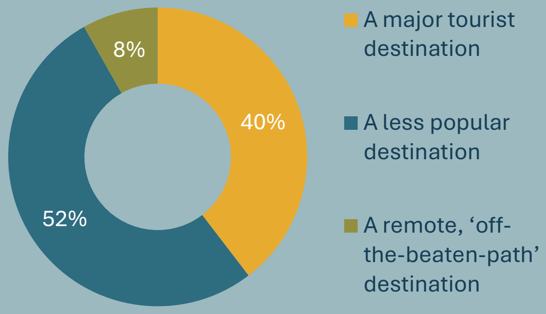
WHERE TO?



TRAVELLING WITH?

With family	With partner	Solo
48% (11%*)	30% (3%*)	11%

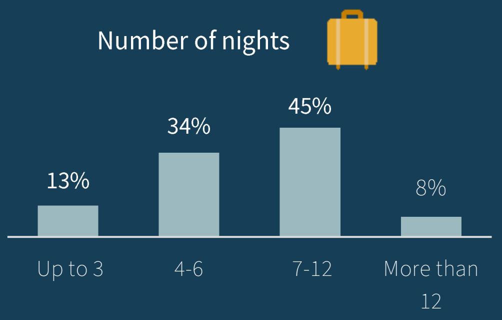
TYPE OF DESTINATION

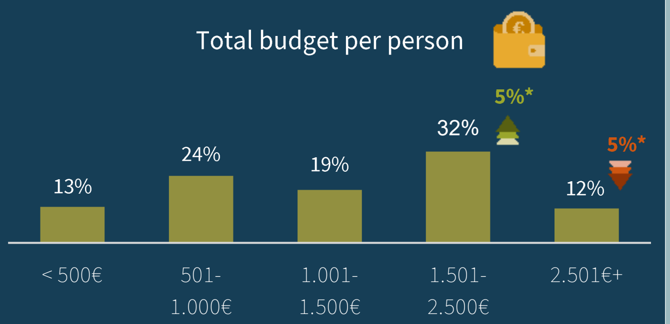


TOP SPENDING PRIORITIES

29%	Accommodation
23%	Food & Drinks
20%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Spain	9% (4%*)
Italy	9% (3%*)
Greece	9% (4%*)
Croatia	7%
Türkiye	5%

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

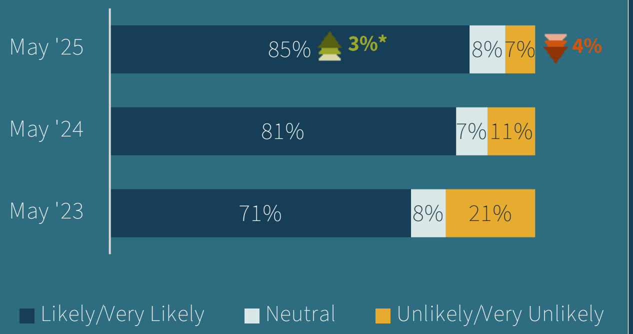
* Statistically significant difference vs a year ago (May 2024)

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

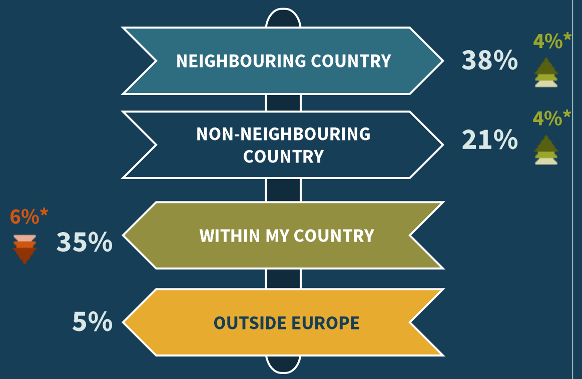
Spaniards’ travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



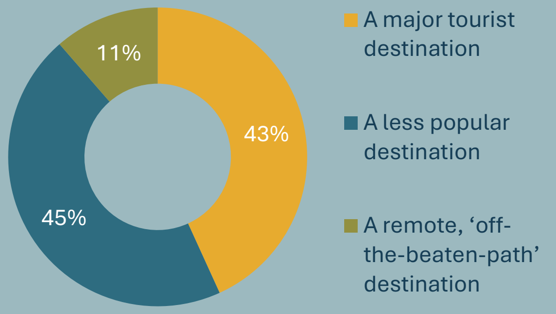
WHERE TO?



TRAVELLING WITH?

42%	40%	8%
With partner	With family	Solo

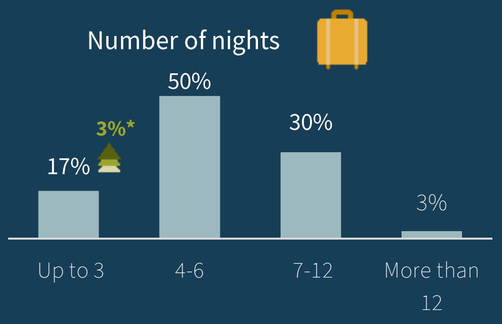
TYPE OF DESTINATION

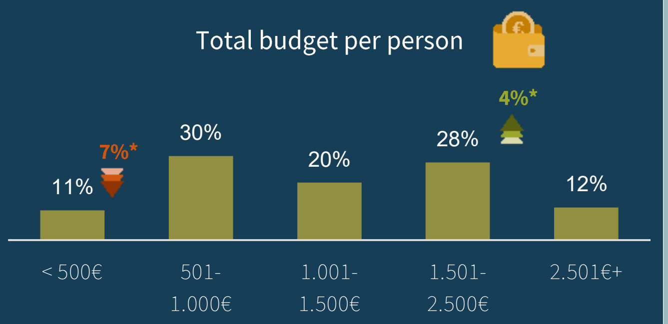


TOP SPENDING PRIORITIES

30%	Accommodation
25%	Food & Drinks
17%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
France	15%
Italy	12% 3%*
Portugal	8%
UK	7%
Germany	6%

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

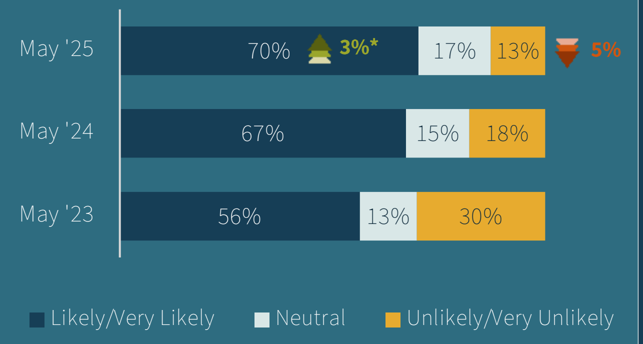
* Statistically significant difference vs a year ago (May 2024)

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

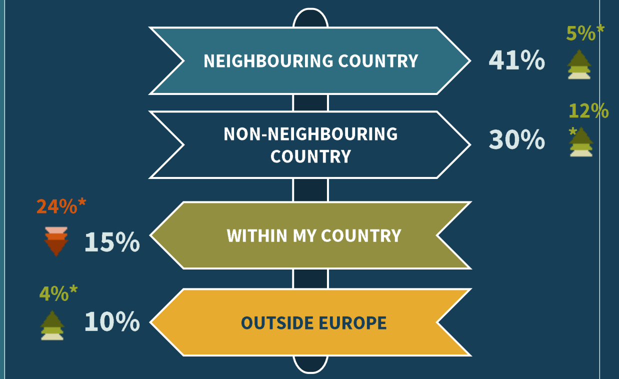
Swiss travel plans

Travel horizon: June-November 2025

INTENTION TO TRAVEL



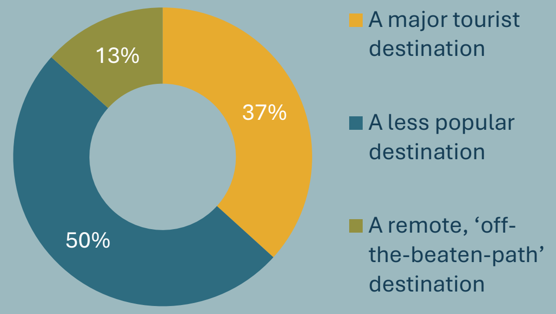
WHERE TO?



TRAVELLING WITH?

With family	With partner	Solo
37% (7%*)	27%	20%

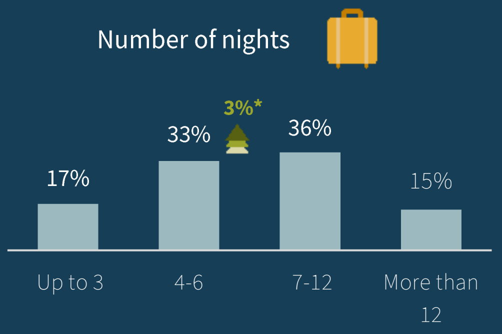
TYPE OF DESTINATION

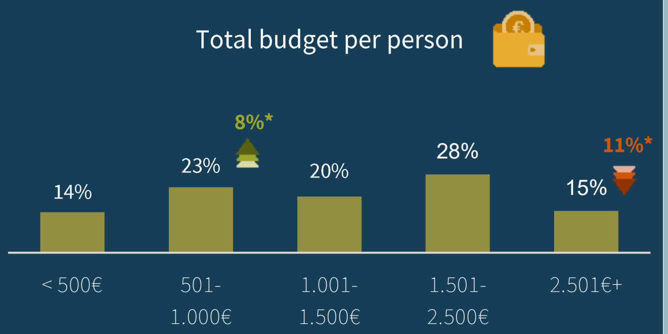


TOP SPENDING PRIORITIES

31%	Accommodation
24%	Food & Drinks
13%	Activities at the destination

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT
Italy	17% (10%*)
Germany	11% (5%*)
Spain	10% (5%*)
France	8%
Austria	7%

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

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

No. of respondents: 501 (total sample of respondents per country)

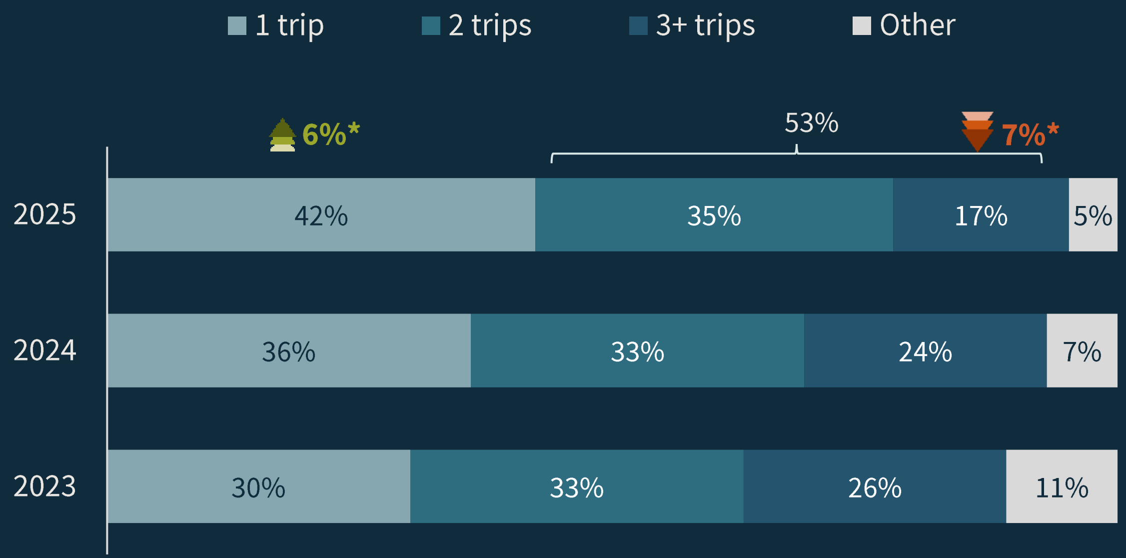
Planning the details

02

More Europeans are limiting themselves to a single trip, likely due to economic reasons

38% of Europeans planning a single trip are concerned about their economic situation, compared to an average of 25% among those planning three or more trips.

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 (May 2024)

No. of respondents: 4,635

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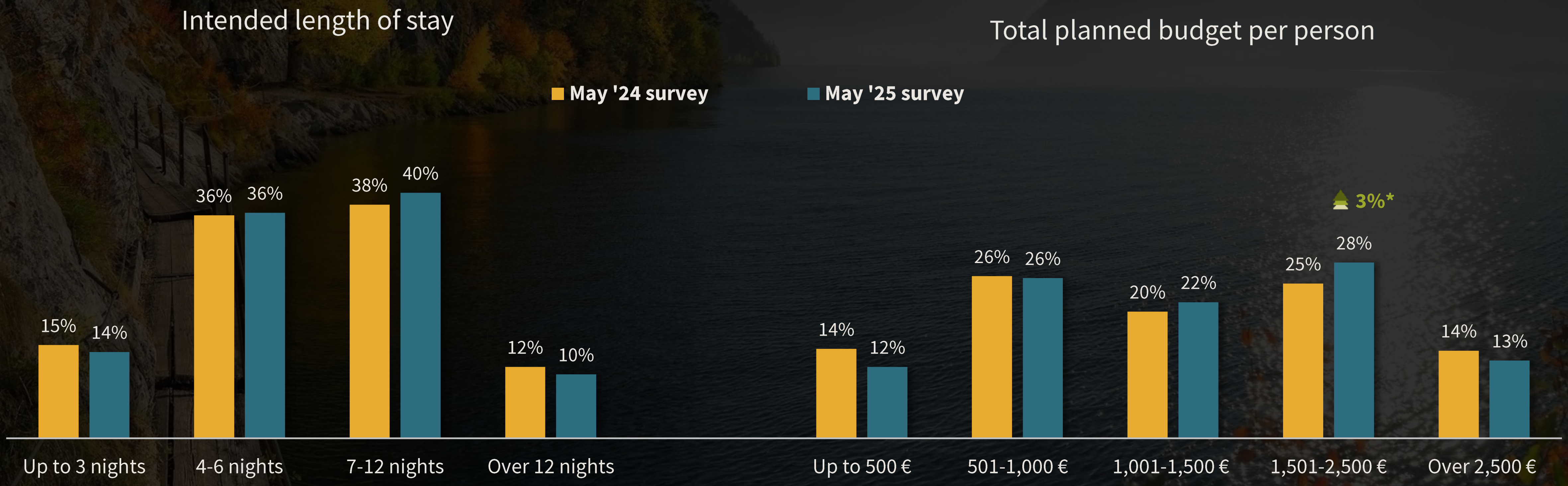
European travellers continue to favour 7–12 night stays, with a growing share planning budgets of €1,500–€2,500 (+3%)



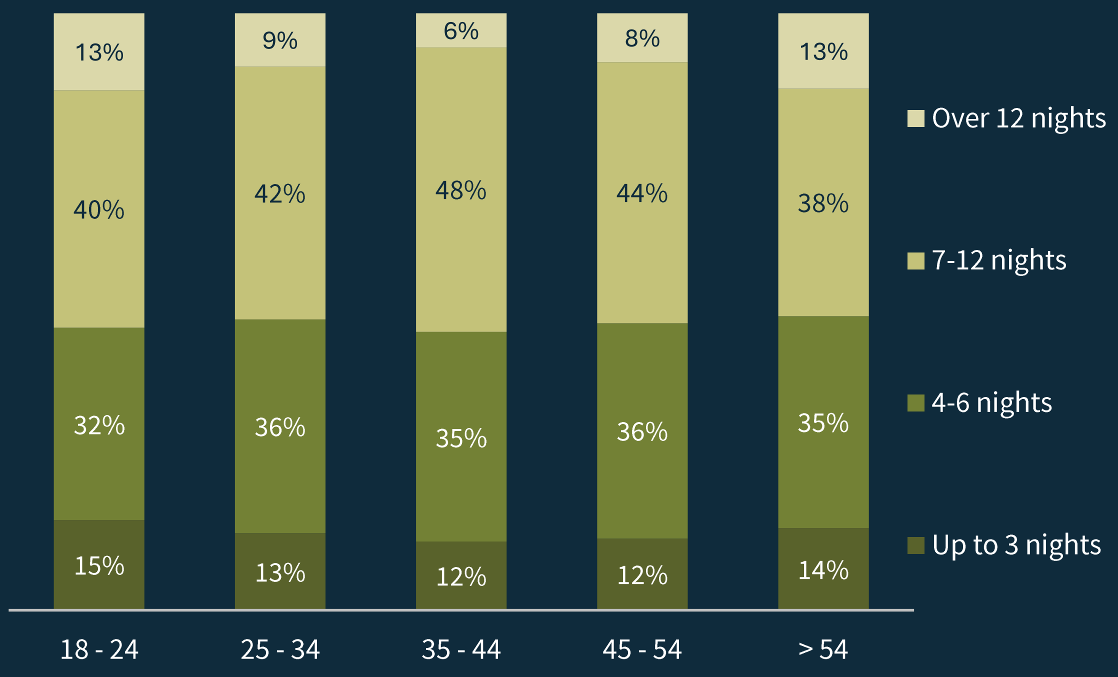
Q18. What would be the length of your next overnight trip?
Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

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

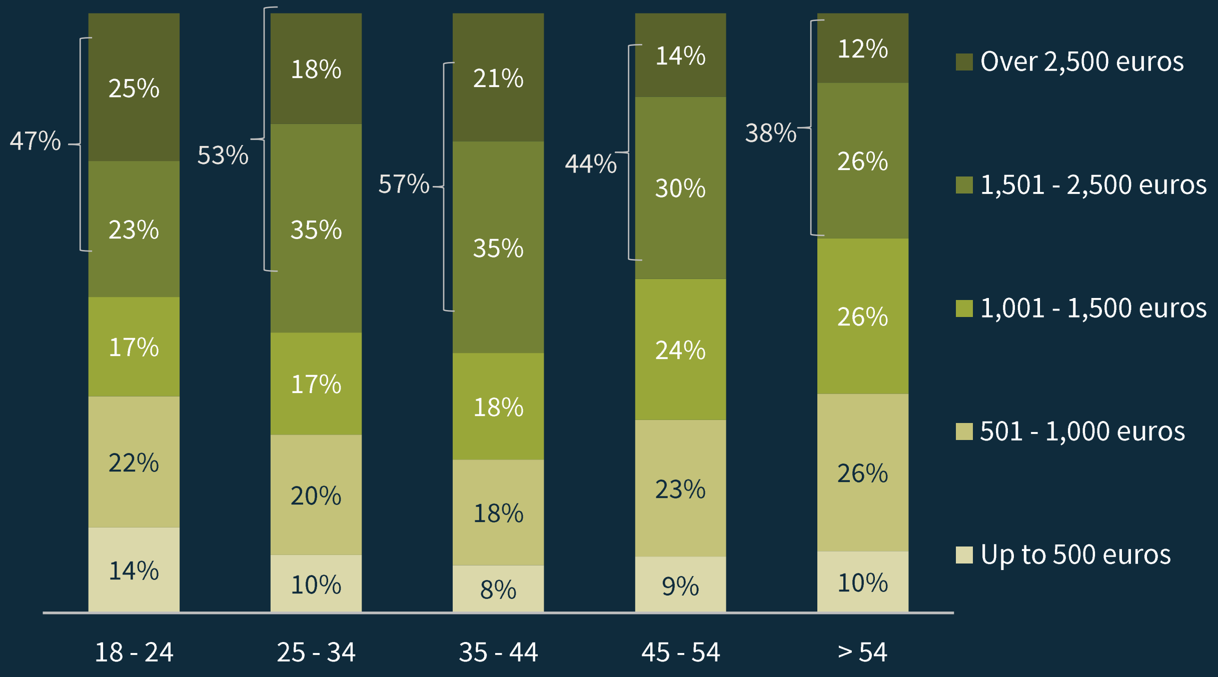
No. of respondents: 4,635

Europeans aged 35–44 are most likely to take longer trips and spend over €1,500

Intended length of stay by age group (nights)



Projected budget by age group (euros)



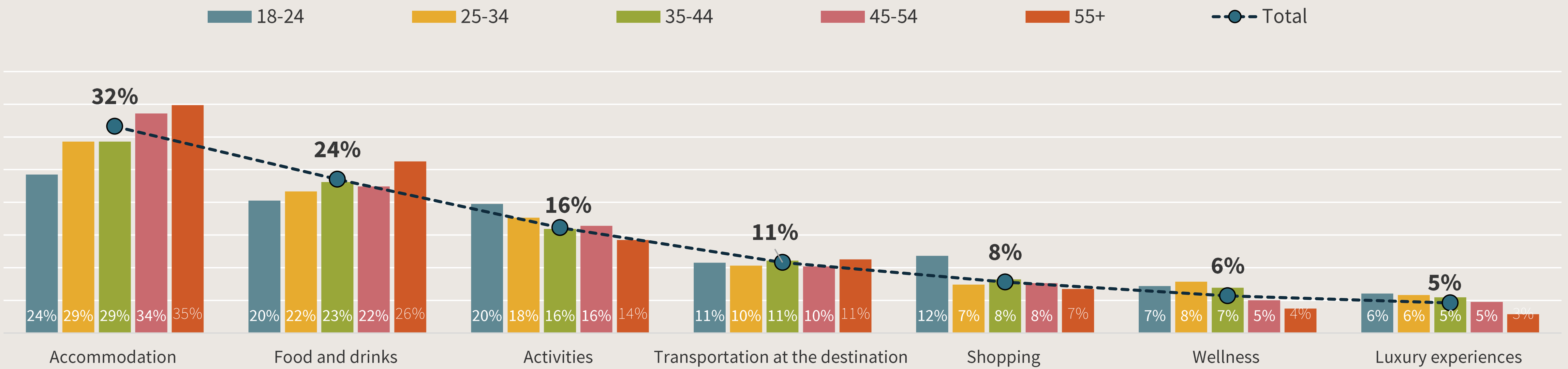
The budget is per person per trip, including accommodation, transportation and travel activities

Q17. What would be the length of your next overnight trip?
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,635

Europeans prioritise spending on accommodation, food, and activities; Shopping and luxury experiences take a back seat amid economic strains

Travellers over 55 spend more on accommodation and food, while 18–24-year-olds prioritise tourist activities and shopping



Travellers planning Culture & Heritage trips (44%), Nature & Outdoors holidays (34%), or City Breaks (30%) are most likely to prioritise spending on tourism activities.

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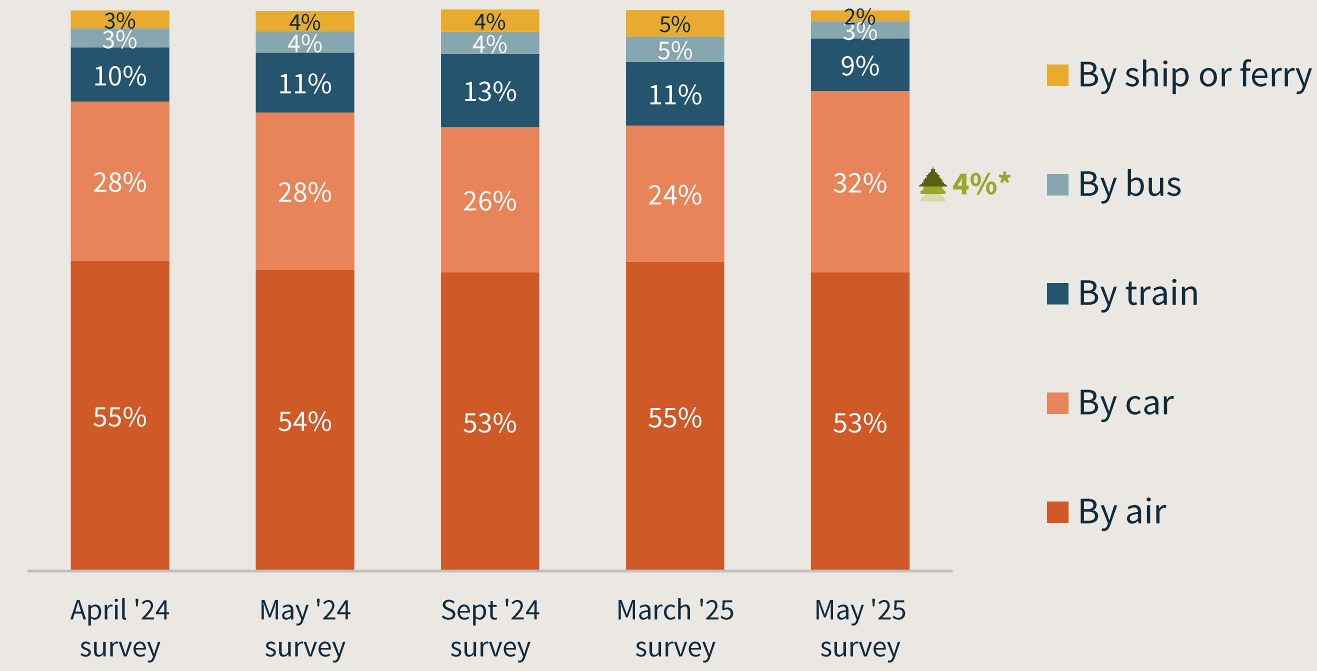
TRAVEL
COMMISSION

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

No. of respondents: 4,635

Air travel still leads, while car travel reaches its highest level in two years

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 (May 2024)

Top three reasons for flying	Top three reasons for driving
Speed 27%	**Comfort** 21%
Value for money 21%	**Value for money** 20%
Easy to plan & book 15%	**Easy to plan & book** 18%

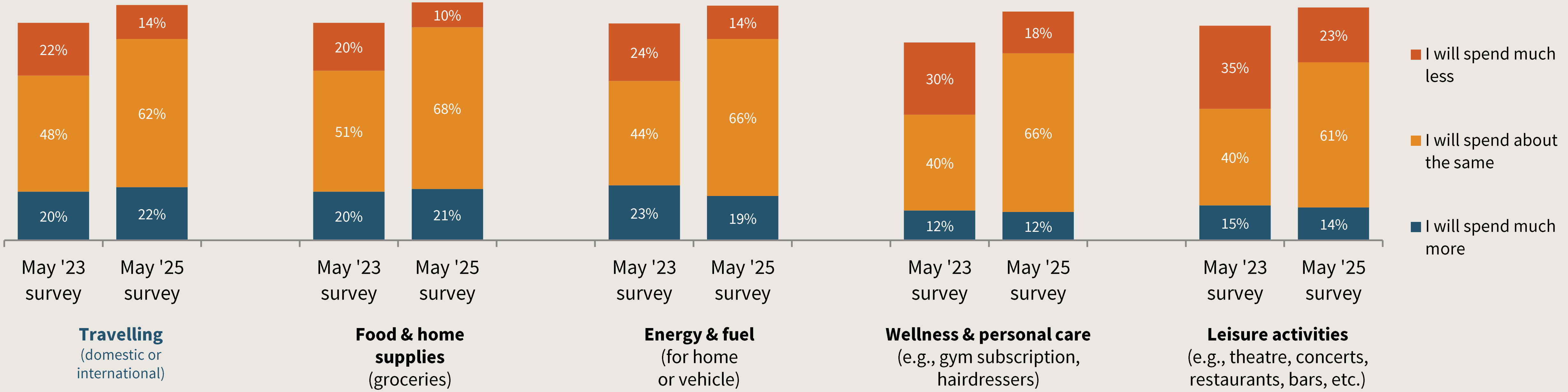
No. of respondents: 4,635

Travel considerations

03

Holidays matter to Europeans: Travel budgets on par with food and energy

84% plan to maintain or increase their travel budget through November 2025



Youngsters plan to spend more on travel
A higher share of 18–24-year-olds (32%) foresee spending significantly more on travel, compared to just 18% among those aged 55 and over.

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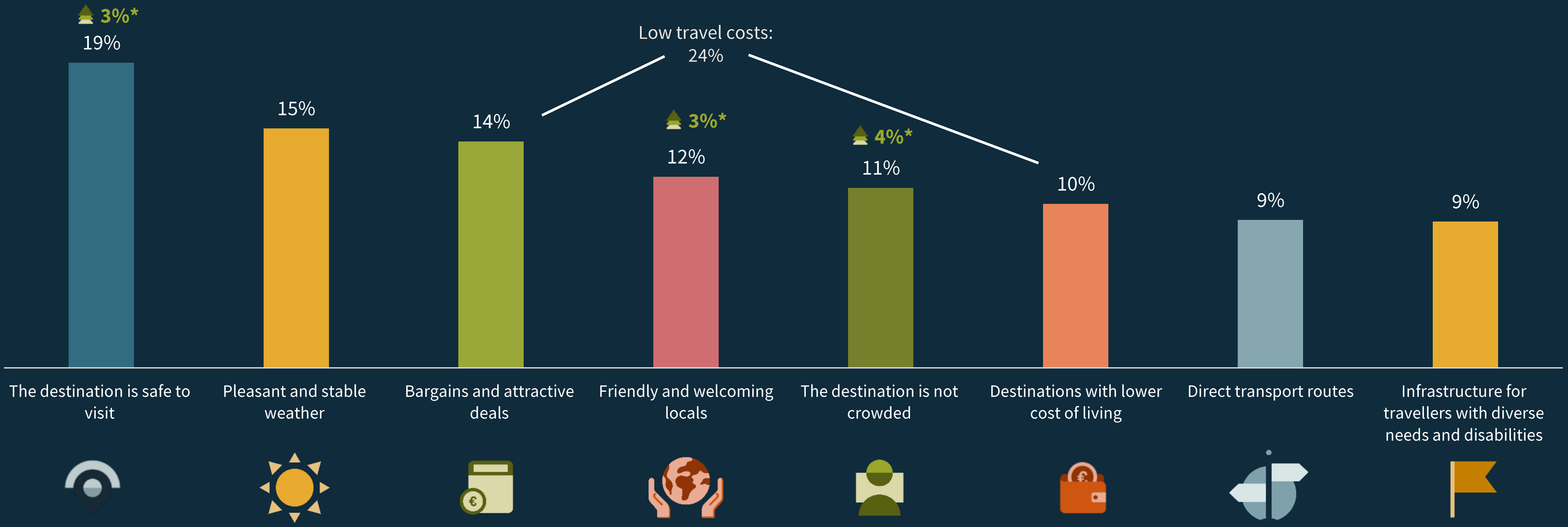
Q4. Thinking about the next six months, do you foresee any changes in your budget for each of the following categories?

No. of respondents: 6,001

Destination safety, stable weather, and attractive deals remain the top factors influencing Europeans' destination choices

Europeans' top criteria in choosing a travel destination



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

No. of respondents: 6,001

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

What do European travellers worry about?

Concerns about overcrowding have risen from the 7th to the 3rd place, in one year

22%
Rise in the overall cost of my trip due to inflation

17%
Economic situation and personal finances

12% ▲ 3%*
Too many visitors at the destinations I want to visit

12%
The ongoing conflict between Russia and Ukraine

10%
Extreme weather events

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

8% ▼ 6%*
Potential impact on travel safety due to tensions in the Middle East

5%
The environmental footprint of my travel

5%
Booking and cancellation policies (refunds, etc.)

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NOTE: The survey was conducted prior to the recent escalation in tensions between Israel and Iran.

No. of respondents: 6,001

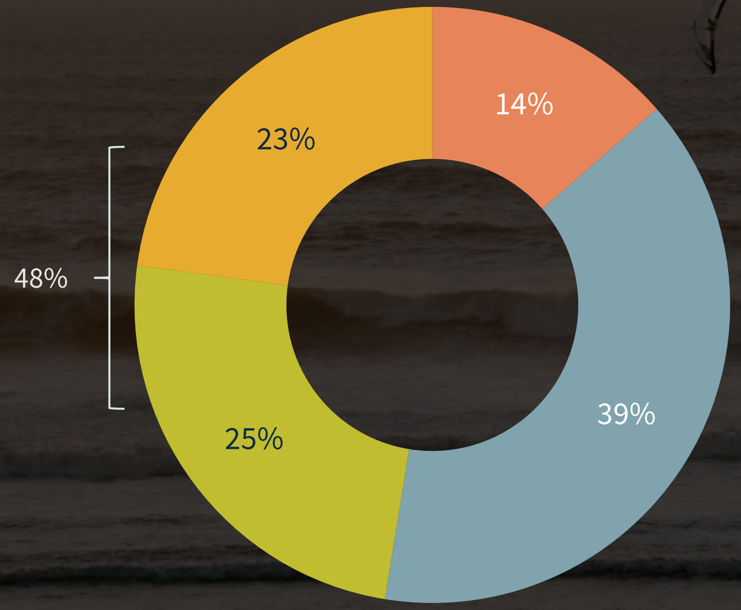
* Statistically significant difference vs a year ago (May 2024)

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

The impact of geopolitical conflicts on travel decisions

48% of Europeans would avoid destinations affected by conflict or conflict-related travel disruption

Impact of geopolitical tensions on destination choice



Top three markets that only avoid direct safety risks		Top three markets that avoid any disruption on travel experience	
Poland	48%	Austria	31%
Spain	46%	Italy	28%
France	42%	Germany	27%

No. of respondents: 6.001

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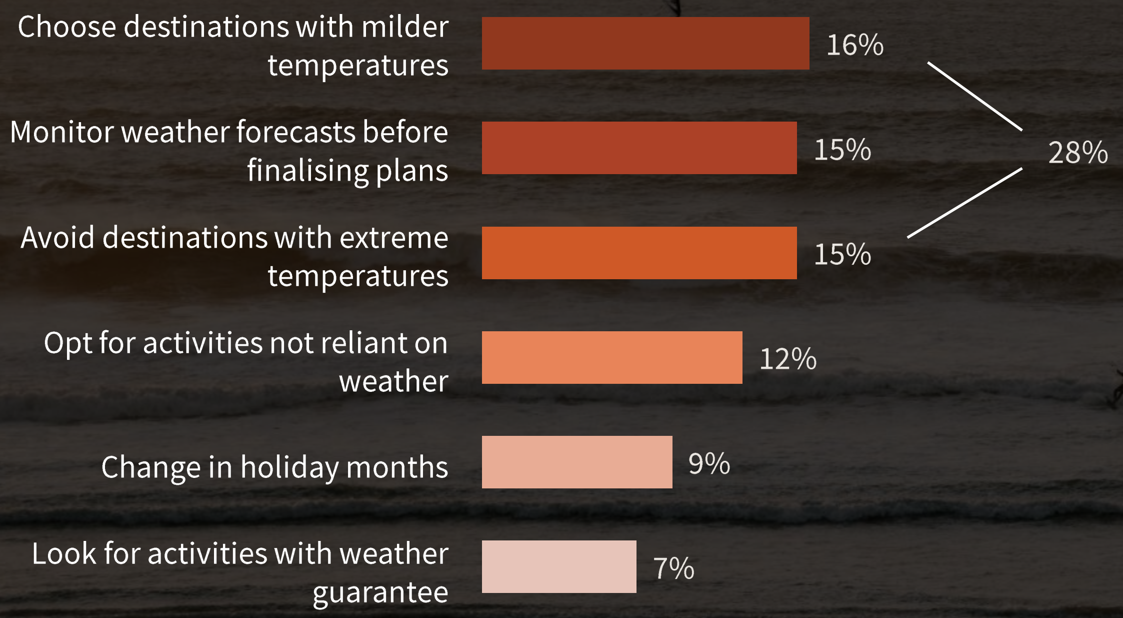
NOTE: The survey was conducted prior to the recent escalation in tensions between Israel and Iran.

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?

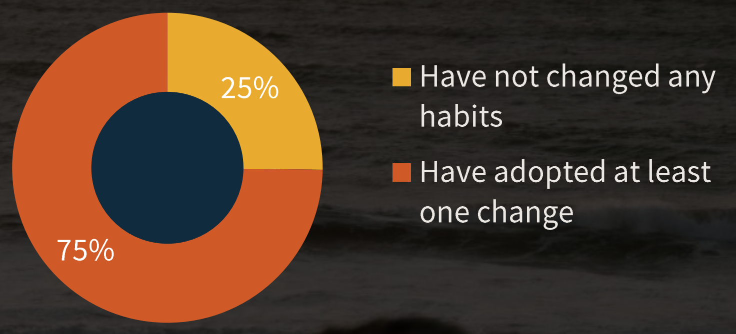
Travel in the era of climate change

Gen Z Europeans are most likely to change their travel habits due to climate change

Most popular changes of habits due to climate change



Does the changing climate impact Europeans' travel habits?



79% of Europeans aged 18–24 have adjusted their travel behaviour in response to climate change, compared to 61% of those over 55.

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

No. of respondents: 6.001

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 18**: 2-17 April 2024; sample = 5,859 / **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
  - **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)
- 54% of the Wave 22 survey respondents are male, and 46% 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	54	96	92	56	30	46	26	**602**
25 - 34	136	112	73	100	128	152	106	71	84	54	**1,016**
35 - 44	126	134	103	117	143	150	120	108	135	84	**1,220**
45 - 54	138	168	105	106	137	168	92	101	112	102	**1,229**
≥55	262	266	175	123	246	188	126	190	124	234	**1,934**
Total	**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**501**	**500**	**6,001**

- **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.

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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