

The **New Climate Reality** in the Mediterranean: How Heatwaves Are Reshaping **Traveller** **Perceptions**

August 2026



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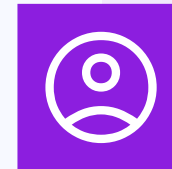
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DEMAND & MARKETS

- GLOBAL DEMAND TRENDS
- VISITORS' PROFILE
- PRESENCE AND MOBILITY



Traveller Experience & Sentiment

- TRAVELLER INTERESTS & SENTIMENT
- TRAVELLERS' INTEREST & SENTIMENT
- DESTINATION PERCEPTION: SAFETY, CLIMATE, ETC.
- SATISFACTION WITH HOTELS & HOLIDAY RENTALS



IMPACT: SPEND & SUSTAINABILITY

- VISITOR SPEND
- SUSTAINABILITY
- RESIDENTS' SENTIMENT



Supply & Competitiveness

- DESTINATION PULSE: POIs MAPPING AND MONITORING
- TOURISM ACTIVITIES & EXPERIENCES SUPPLY
- HOTELS & HOLIDAY RENTALS SUPPLY
- EVENTS: CALENDAR & IMPACT FORECAST
- COMPETITIVE ANALYSIS

What are we analysing?

Perception of Climate Index

Evolution of climate perception on key Mediterranean destinations during summer months (May to September), since 2023

Heatwaves Periods

Based on official national authority declarations, shown according to the week in which the event occurred

Destinations

Spain, Portugal, France Italy, Greece

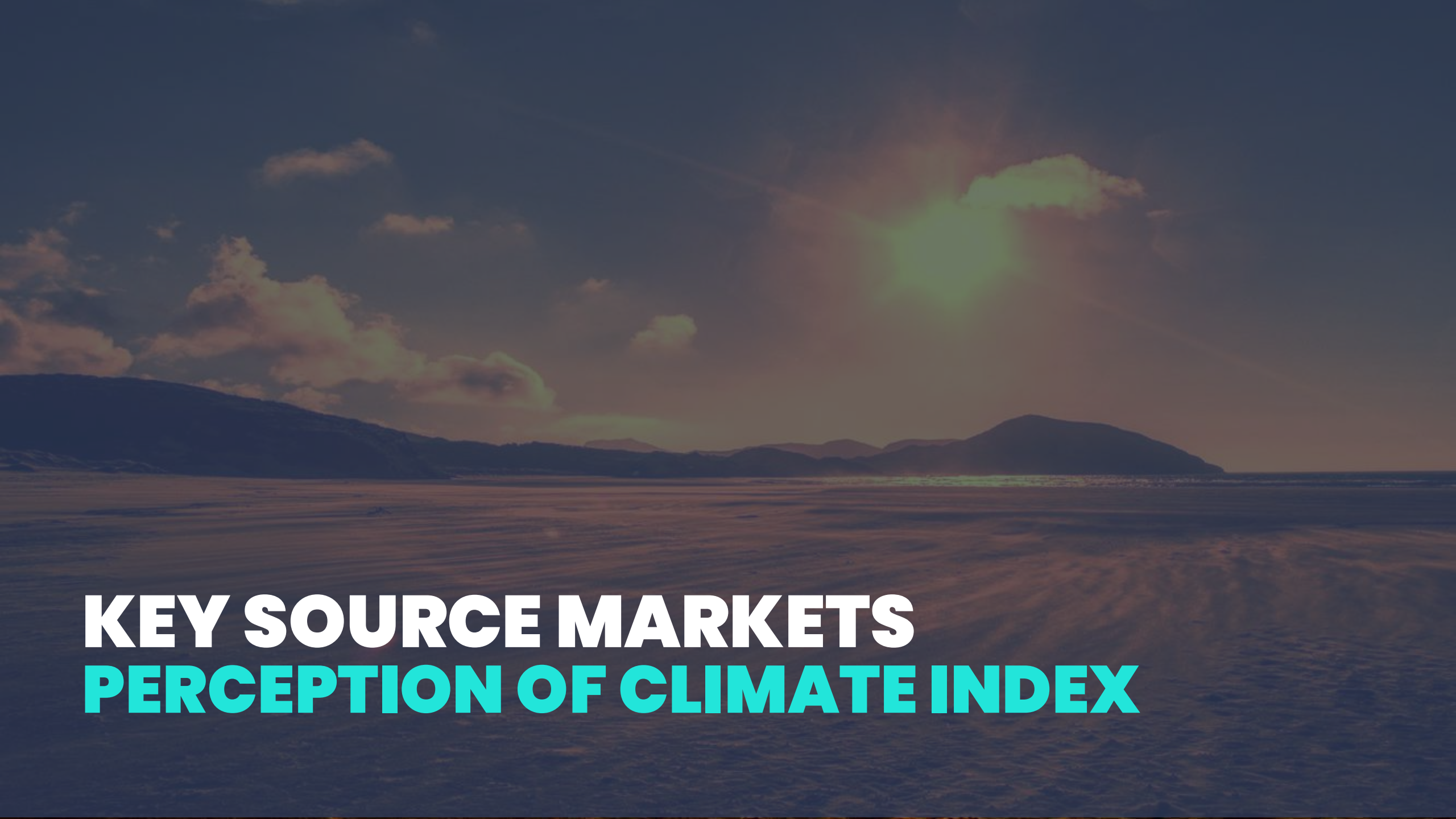
Source markets

Global Index (All Source Markets), plus United Kingdom, United States, Spain, and France



Measuring Heatwaves: Country-Based Frameworks Comparison

Country	Entity in Charge	Criteria
Spain	AEMET	A period of at least 3 consecutive days during which at least 10% of the reference weather stations simultaneously exceed their 95th percentile of daily maximum temperature (based on the local climatology of July and August).
France	Météo-France	Based on the National Thermal Indicator. A heatwave is declared when the indicator remains at 23.4°C or higher for at least 3 consecutive days and reaches 25.3°C or higher on at least one of those days.
Italy	Several	The official system is based on heat-health warnings issued city by city ("yellow", "orange", "red"), with thresholds tailored to local climatic and health conditions. No nationwide climatological definition is defined.
Portugal	IPMA	At least 6 consecutive days during which the daily maximum temperature is more than 5°C above the climatological monthly average for the reference period (currently 1991-2020).
Greece	HNMS/EMY, based on local climate	No nationwide climatological definition is defined. Operational warnings are impact-based and use local percentile thresholds to identify heatwaves.



KEY SOURCE MARKETS **PERCEPTION OF CLIMATE INDEX**

Which Source Markets Are Most Sensitive To Heatwaves?

Across all destinations, source markets share four common behaviours:

- **Heatwaves affect perception most** when they are early, prolonged or exceptional.
- **Temporary declines are far more common** than permanent deterioration.
- **Recovery tends to occur quickly** once temperatures normalise.
- Climate **expectations strongly influence sensitivity** levels.



Which Source Markets Are Most Sensitive To Heatwaves?



Most Sensitive: French Travellers

Compared to other source markets studied, **French travellers appear significantly more sensitive to climate discomfort in the Mediterranean destinations analysed**, showing stronger, more frequent and more persistent declines in destination climate perceptions during prolonged heat events. **French visitors consistently register lowest average PCI levels in all destinations studied compared with most other markets**, showing greater evidence of perception of climate deterioration in France, Italy and Greece.



Highly Sensitive: Domestic Markets

Domestic travellers in the two markets analysed—France and Spain—show greater sensitivity to extreme heat than international visitors. PCI data indicates that travellers visiting destinations within their own country tend to respond more negatively to unusually high temperatures, potentially reflecting their **stronger ability to benchmark current conditions against established climate expectations** and historical experience.



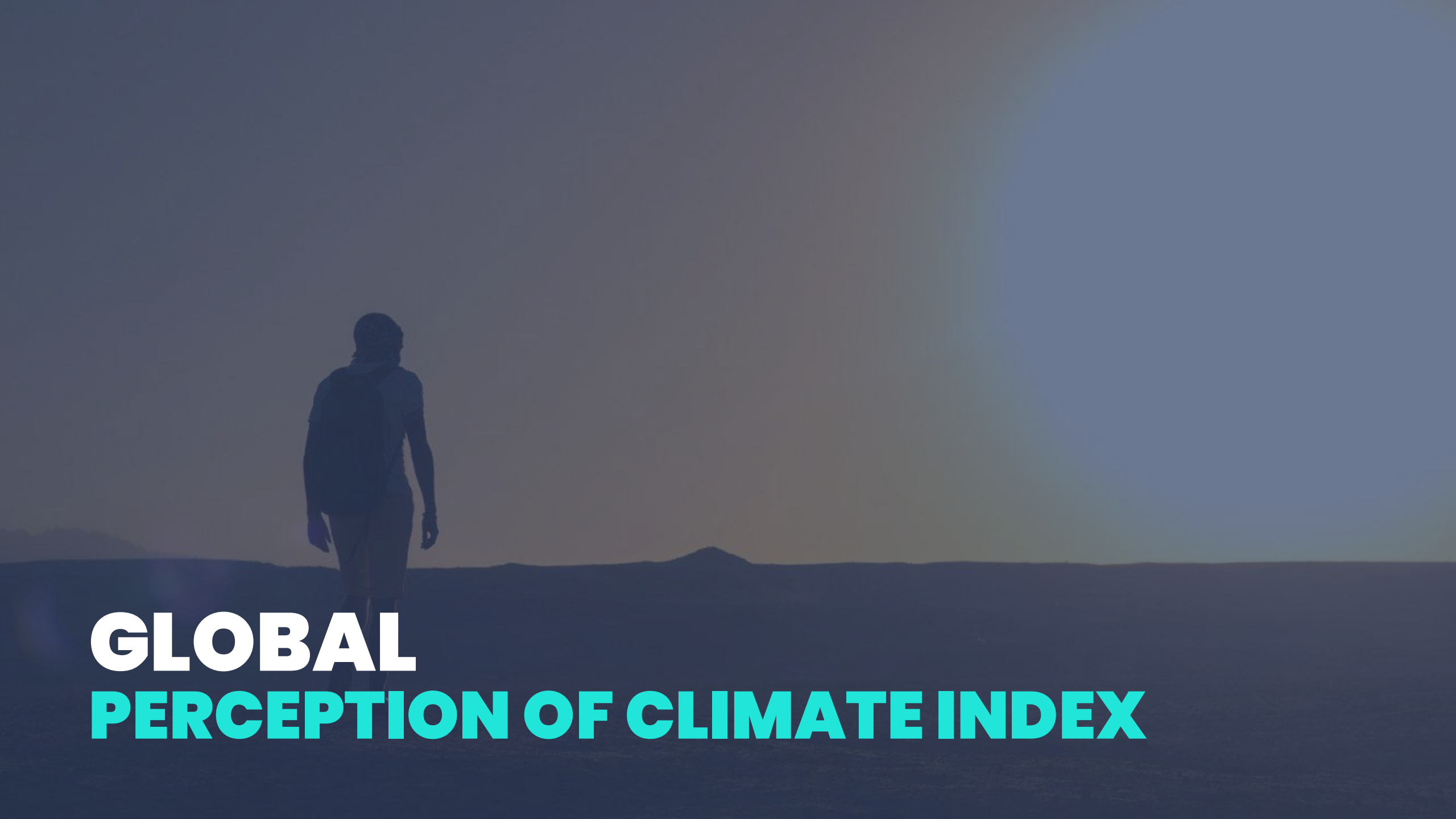
Moderately Sensitive: British Travellers

The UK market reacts noticeably to heatwaves, but mainly through short-term discomfort. The UK market appears highly aware of heat events, but also highly resilient once conditions improve. Across destinations, high PCI values recover quickly, and declines tend to coincide closely with heatwave periods. Moreover, data on PCI evolution shows **little evidence of structural deterioration of climate perception across the Mediterranean destinations analysed.**



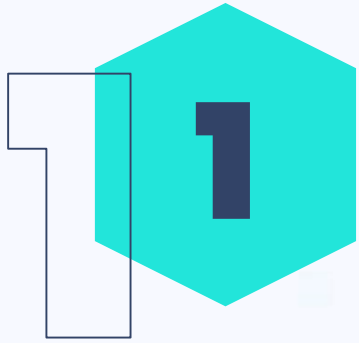
Less Sensitive: U.S. Travellers

Compared to the European source markets analysed, the **American travellers appear considerably more tolerant of Mediterranean summer heat, maintaining consistently positive climate perceptions across most destinations studied.** In general, PCI values are high and correlation between heatwaves and PCI drops are less evident. In fact, even **when destination-level PCI declines occur, US traveller sentiment tends to remain relatively stable.**



GLOBAL PERCEPTION OF CLIMATE INDEX

Key Takeaways: Short-term discomfort drives volatility, while unexpected extremes shape long-term perception



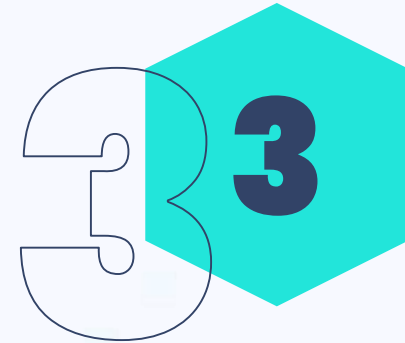
The impact of immediate climate experience

Across Mediterranean destinations studied, climate perception remains primarily influenced by travellers' immediate experiences, explaining the overall stability of the Perception of Climate Index (PCI) trends despite increasingly frequent heatwaves.



Spain, Portugal and Greece: Stronger short-term reactions

Spain and Greece experience the stronger short-term reactions, with distinct PCI fluctuations reflecting higher sensitivity to episodes of extreme discomfort. Portugal displays more stable responses, suggesting that elevated temperatures have become increasingly normalised within traveller expectations.



France and Italy: The unexpected episodes affect long-term perception

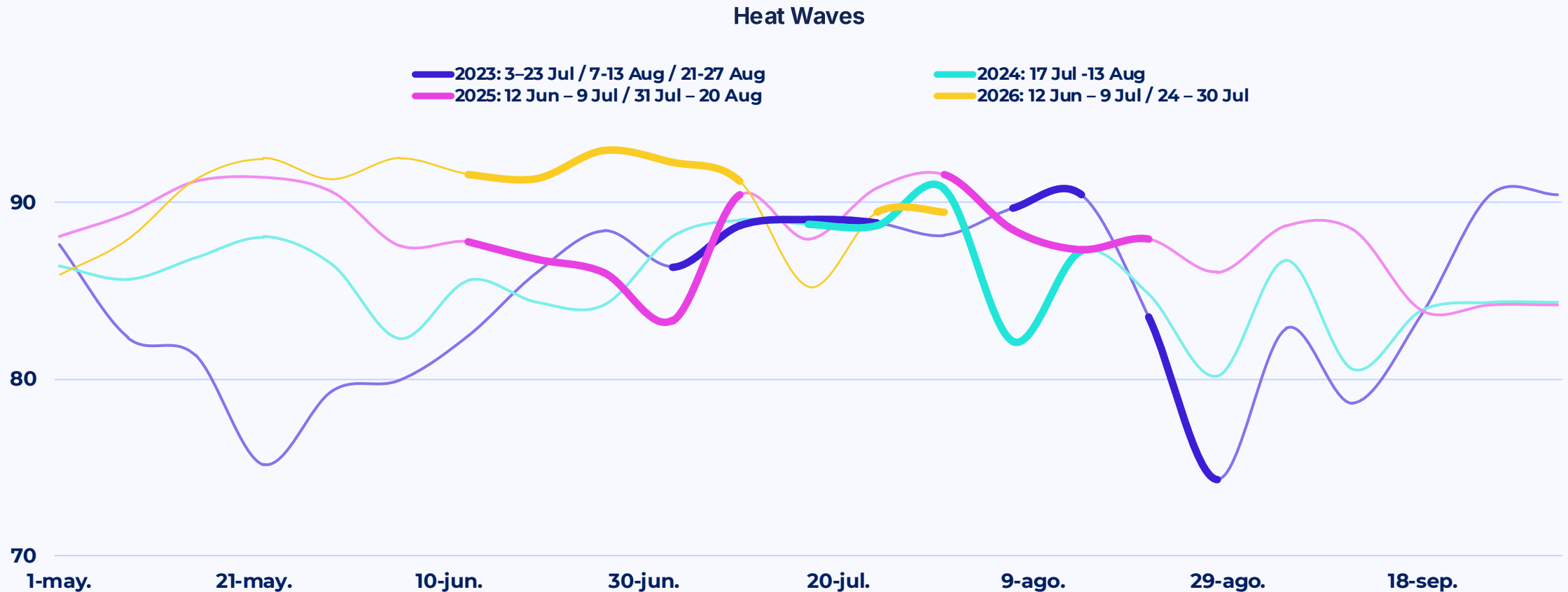
Even though up to 2026, Italy shows a more stable PCI evolution over the last years, long-term perception effects emerge when extreme conditions become unusually early, prolonged or severe, attracting sustained social attention and sharp immediate reactivity. This is also particularly visible in France, where the summer seasons repeated departures from expected climate patterns.

Spain: Heatwaves Drive Strong Short-Term Reactions, Not Lasting Perception Losses

Perception of Climate Index vs. Heat Waves. Destination: Spain. Source Market: All Source Markets.

Summer Weekly Performance and Year-On-Year Evolution

Summer Season: May to September. Years Analysed: 2023, 2024, 2025, and May to July 2026.



Spain: Acute Weather Events Trigger Short-Term Volatility in Climate Perception

The evolution, since 2023, of Spain's Perception of Climate Index among travellers visiting the country during summer demonstrates that **their reaction to climate conditions remains largely short term and closely linked to immediate comfort**. While heatwave episodes consistently coincide with declines in climate perception, with drops ranging from -3 to -16 PCI points, these impacts tend to be temporary. **Traveller sentiment typically rebounds once temperatures return to expected seasonal levels**, resulting in a relatively stable summer climate perception over time. Across the summer seasons analysed, Spain maintained an average PCI of 87.2 out

of 100, highlighting the destination's ability to absorb episodes of extreme heat without experiencing lasting reputational damage.

The comparison across years suggests that **what matters most is not only the occurrence of extreme heat, but also its timing and persistence**. The stronger declines observed when heatwaves arrive earlier in the season or extend for longer periods indicate that travelers are particularly sensitive to disruptions of expected summer conditions.

Spain also exhibits some of the most pronounced weekly fluctuations among Mediterranean destinations, reflecting a **higher level of responsiveness to acute weather events rather than a lasting deterioration of its climate reputation**.



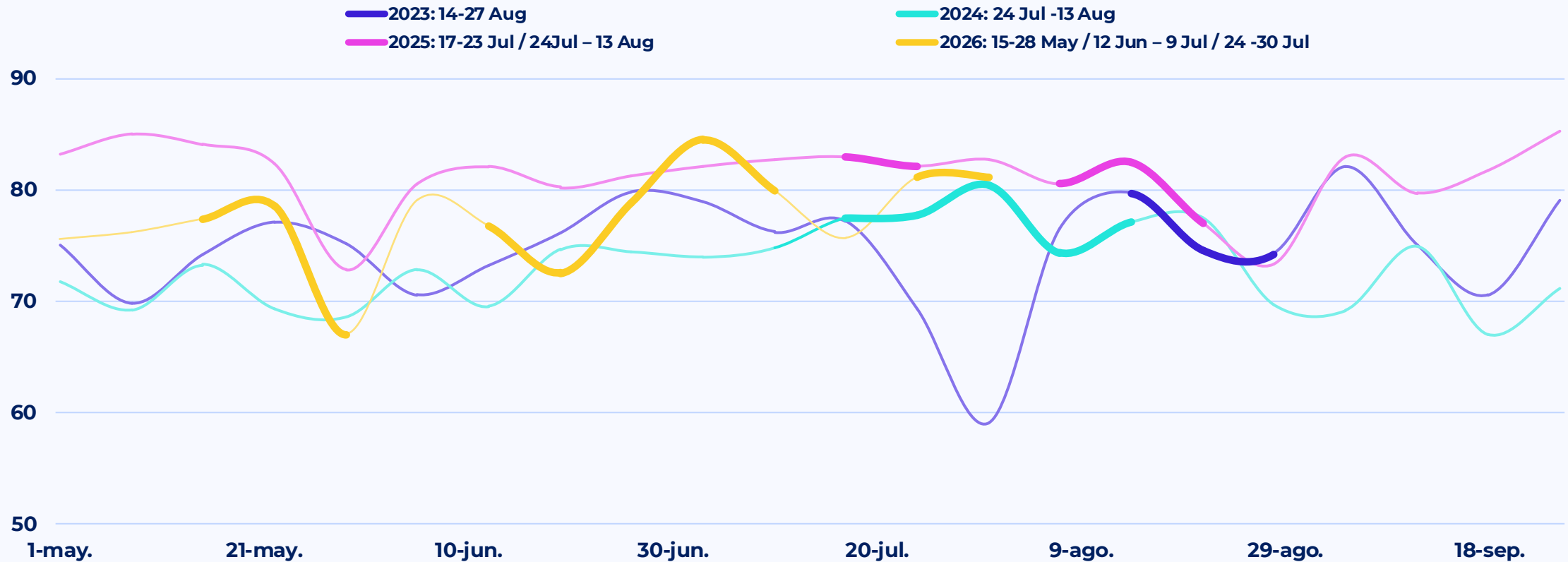
France: Unexpected Extreme Heat in 2026 Erodes Climate Appeal

Perception of Climate Index vs. Heat Waves. Destination: France. Source Market: All Source Markets.

Summer Weekly Performance and Year-On-Year Evolution

Summer Season: May to September. Years Analysed: 2023, 2024, 2025, and May to July 2026.

Heat Waves



France: Persistent heatwaves create early signs of a perception drag

France stands out as the destination most affected by prolonged and atypical heatwave conditions among the markets analysed, with its Perception of Climate Index (PCI) **showing greater vulnerability to sustained periods of extreme heat during summer 2026**. Between May and July 2026, France registered an average PCI of 77.2 points, significantly below the levels observed in Portugal (93.5), Italy (91.6), Spain (90.4) and Greece (89.9). This performance suggests that repeated episodes of early and persistent heat are beginning to exert a tangible influence on travellers' overall assessment of France's summer climate conditions.

Up to 2026, France presented a similar behaviour as other destinations, where traveller reactions were primarily short term. Extreme heatwaves experienced in this destination in early summer this year had a clear impact on its PCI: this year suggests that **recurring and persistent heatwaves in 2026 are beginning to influence broader perceptions of summer climate conditions compared to years prior**. The impact is particularly visible when extreme temperatures arrive earlier than expected and remain present over multiple weeks, generating greater social concern and sustained traveler awareness.

As a result, the destination shows signs of **an early deterioration in climate perception, illustrating how exceptional weather events could translate into longer-term reputation effects** when they challenge established expectations.



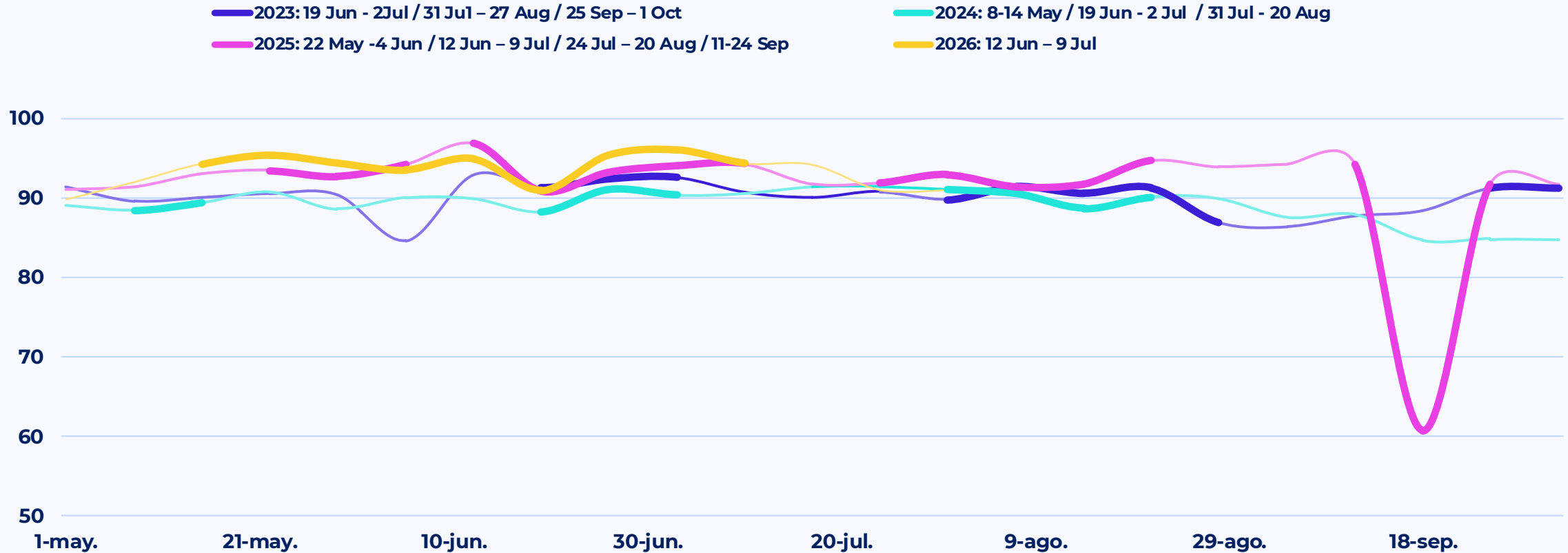
Portugal: Climate Perception Remains Stable as Heat Becomes the New Normal

Perception of Climate Index vs. Heat Waves. Destination: Portugal. Source Market: All Source Markets.

Summer Weekly Performance and Year-On-Year Evolution

Summer Season: May to September. Years Analysed: 2023, 2024, 2025, and May to July 2026.

Heat Waves

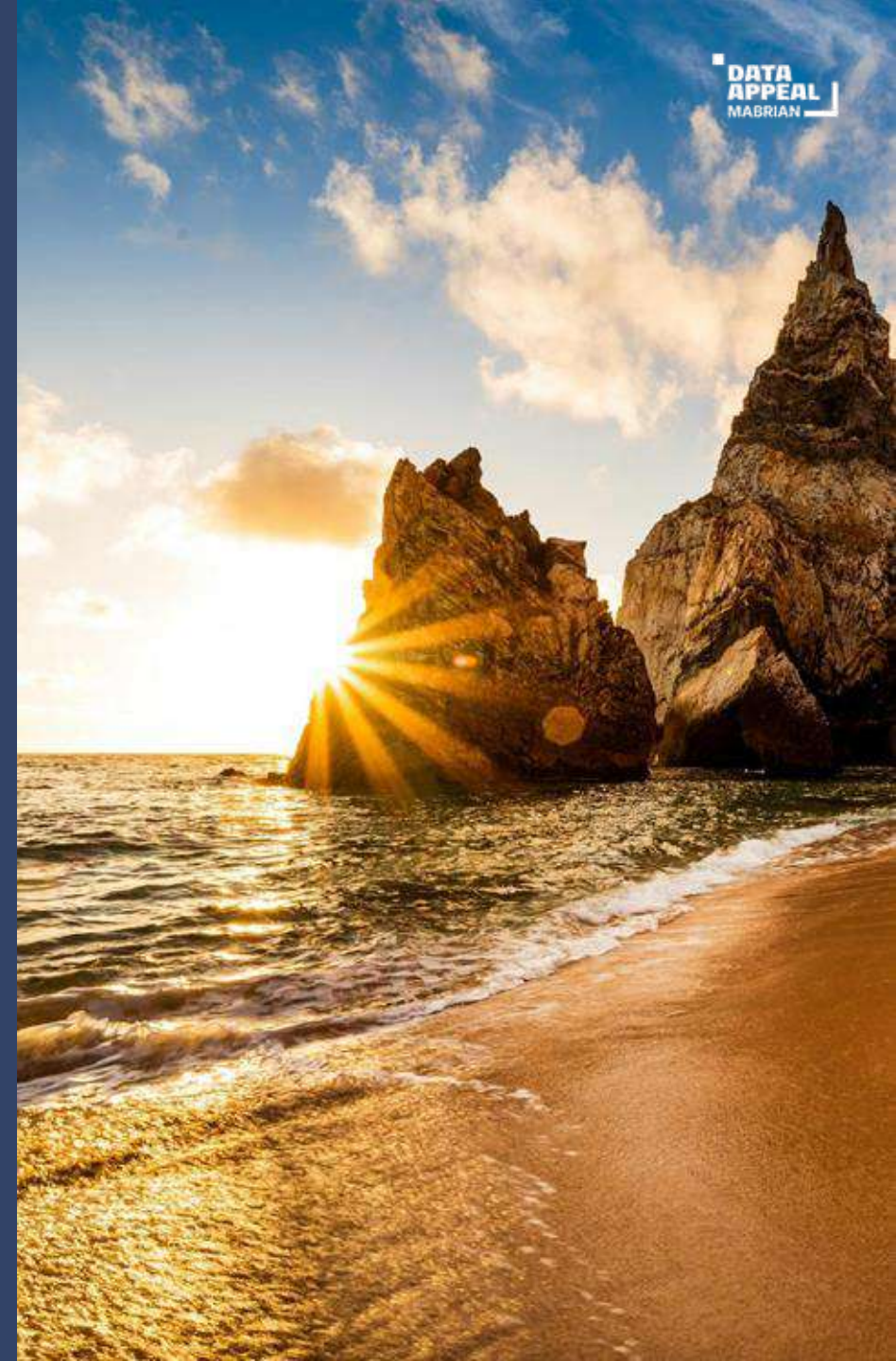


Portugal: High Resilience to Summer Heat Sustains Positive Climate Perceptions

Portugal shows one of the most stable Perception of Climate Index (PCI) across all summer periods in all Mediterranean destinations analysed, achieving an average score of 91.1 out of 100 across the summer seasons studied and showing relatively limited fluctuations during heatwave periods compared with neighbouring markets. While travellers do respond to episodes of extreme heat, these reactions tend to be less intense and shorter-lived, suggesting that warmer summer conditions have become increasingly integrated into the destination's climate image and visitor expectations.

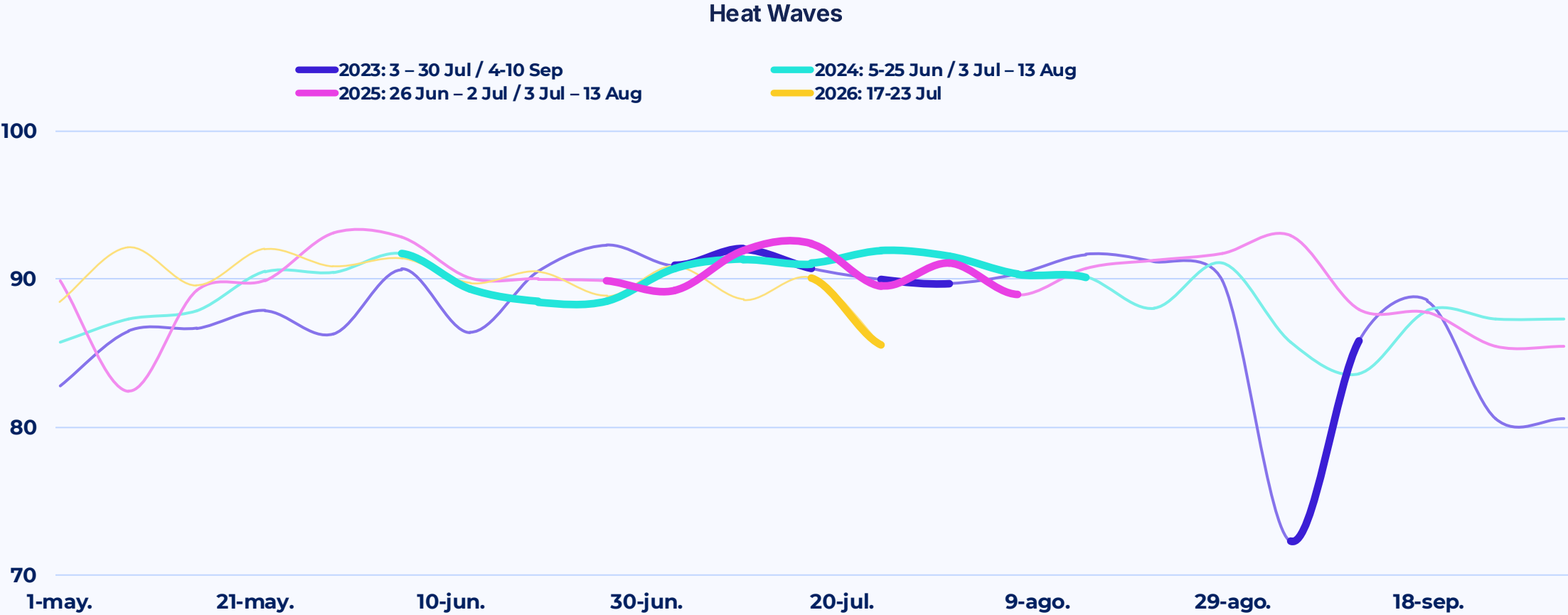
The consistency of PCI levels throughout the period analysed indicates that traveller expectations remain largely aligned with actual summer climate conditions, reducing the potential for long-term perception impacts from extreme weather events. Notable exceptions remain rare and highly event-specific. The most significant example was the 33.5-point drop recorded during the mid-September 2025 heatwave, an unusually severe and unexpected episode that temporarily affected traveller sentiment. However, the impact proved transient, with climate perception returning to normal levels within a week, further highlighting Portugal's resilience to extreme heat events.

This resilience highlights Portugal's ability to sustain positive climate perceptions even during periods of elevated temperatures.



Greece: Climate Perception Closely Mirrors Heatwave Intensity

Perception of Climate Index vs. Heat Waves. Destination:Greece. Source Market: All Source Markets.
Summer Weekly Performance and Year-On-Year Evolution
Summer Season: May to September. Years Analysed:..2023, 2024, 2025, and May to July 2026.



Greece: Climate Perception Remains Stable, Despite a Softer 2026 Performance

Greece maintains a consistently strong Perception of Climate Index (PCI) across all summer seasons analysed, with scores generally remaining close to or above 90 points out of 100 (89.2 on average) despite recurring heatwave episodes. This performance suggests that **travellers continue to associate the destination with favourable summer climate conditions, even during periods of extreme heat.**

The data indicates **that climate perception remains closely linked to heatwave intensity, with PCI levels tending to soften during periods of sustained high temperatures.** However, unlike destinations where individual heatwave episodes trigger

severe perception swings, the impact in Greece has generally remained moderate and temporary, with traveller sentiment recovering as conditions return to seasonal norms. This swift recovery once conditions improve indicates that climate-related dissatisfaction is often linked to specific events rather than a structural reassessment of Greece as a summer destination.

Nevertheless, **2026 introduces a different dynamic. While PCI levels remain positive overall, performance during the summer months analysed to date has generally underperformed compared with previous years, particularly during** key periods in June and July. This softer trend may signal a growing sensitivity among travellers to recurring heatwave conditions and highlights the importance of monitoring climate perception closely. Should these patterns persist over time, they could increase the risk of longer-term impacts on destination sentiment and climate appeal.

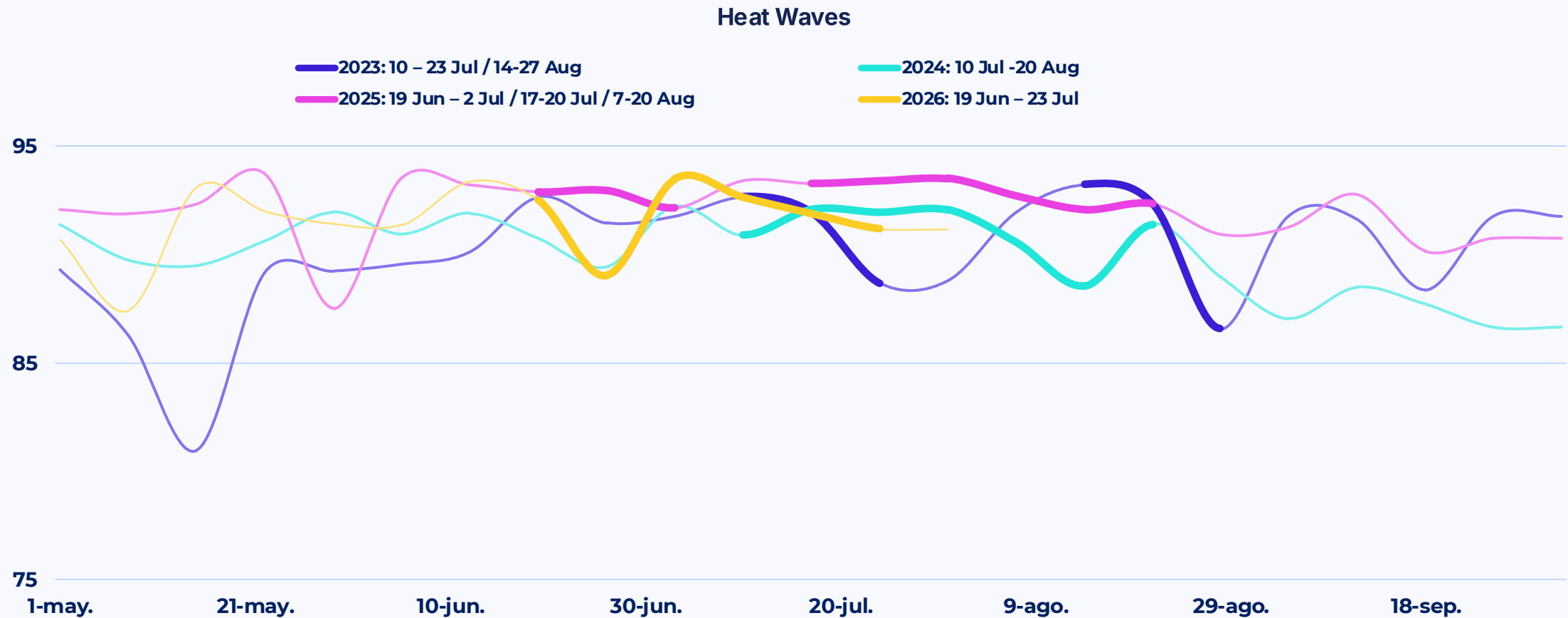


Italy: Cumulative Exposure to Heatwaves Is Starting to Influence Traveller Perception

Perception of Climate Index vs. Heat Waves. Destination: Italy. Source Market: All Source Markets.

Summer Weekly Performance and Year-On-Year Evolution

Summer Season: May to September. Years Analysed: 2023, 2024, 2025, and May to July 2026.



Italy: Growing sensitivity to prolonged heat episodes points to emerging long-term effects

Italy combines relatively stable weekly Perception of Climate Index (PCI) levels with emerging signs of a gradual weakening in overall climate perception compared with previous years.

Following a particularly strong and consistent summer in 2025, when the destination achieved an average PCI of 92.2 out of 100, improving on both 2023 and 2024 performance, **the summer of 2026 is showing a less consistent trajectory, with**

declines concentrated in specific periods rather than across the season as a whole.

While the deterioration remains limited, Italy's average PCI between May and July 2026 stands -0.9 points below the equivalent period in 2025, suggesting that recurrent heatwave exposure may be starting to exert a cumulative effect on travellers' assessment of summer climate conditions.

Compared with Spain or Greece, **travellers' Italy's perception of climate tends to be less volatile during individual heatwave events**, indicating that short-term discomfort generates a more moderate response. However, **the repeated occurrence of high temperatures over extended periods, particularly during the early stages of summer, appears to be exerting a cumulative effect on destination perception** that is starting to show this year that could eventually translate into travellers increasingly considering climate-related experiences into their broader assessment of the destination. In this context, perception of climate should be monitored to prevent long-term perception risks for this destination.





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Help Desk Examples

What is the Sentiments Index and how to read it?

How does the "Spoken Languages" widget work?

Destination Management Examples

What factors influence the marketing and image of a tourist destination?

How can cultural tourism offer a meaningful and authentic experience?

Smart Insights



Digital footprint
summary



Most discussed
topics



General
recommendations



Issue
management



Process
and service
improvements



Communication
and marketing

Which attractions are generating
the most positive word of mouth?

Ask