

European Tourism: Trends & Prospects **Q2/2026**

European tourism holds firm despite rising uncertainty and changing traveller preferences.



International tourist arrivals increased **5.0%** year-to-date over the same period in 2025, while overnights increased **4.8%**.

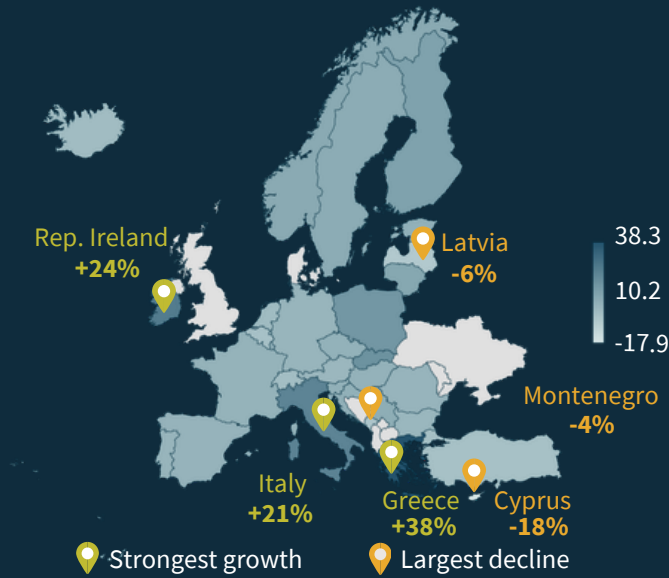


Northern Europe outperformed all other European subregions so far this year. **Southern & Mediterranean Europe** held up well, while **Central European** destinations continued to attract travellers seeking new experiences and better value for money.



Destination performance remained largely stable, with almost **80%** of reporting destinations reporting year-on-year growth and around **1 in 5** achieving double-digit increases in arrivals.

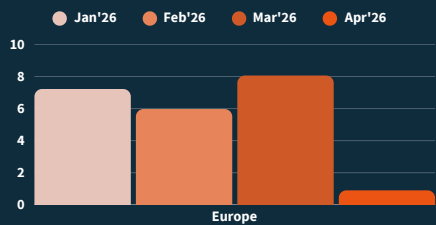
YTD Foreign arrivals to European destinations
% change relative to 2025



Aviation

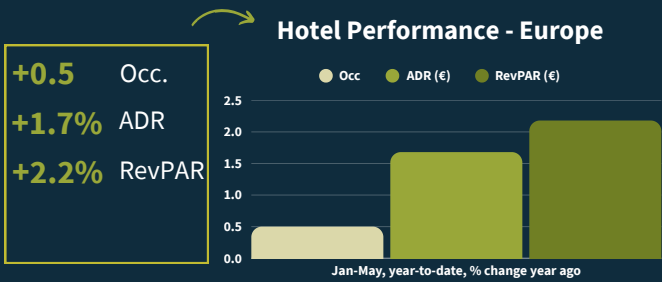
Air passenger activity remained strong in Q1 2026, but momentum slowed as the US–Israel conflict with Iran disrupted travel. Air passenger demand rose 8.0% year-on-year in March, but growth slowed to 1.0% in April, while the average passenger **load factor** in Q1 2026 was 79.0% — up 1.6ppts from Q1 2025.

International Monthly Air Passenger Growth (RPK, % Year)



Accommodation

Europe saw stronger hotel performance than last year, with with **ADR up 1.7%** and **RevPAR growth of 2.2%**, ahead of all other regions.

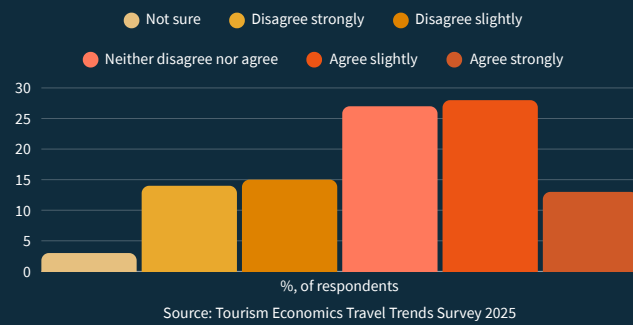


Special Focus: Trends ahead of the 2026 summer season

European travellers will increasingly favour nearby destinations. For many travellers, destinations closer to home feel more familiar, are easier to reach, and offer greater flexibility.

In addition, **climate and sustainability considerations may impact European travel choices**, with shoulder months becoming more important in the European travel calendar.

Likelihood of changing travel behaviour to limit carbon footprint



European Travel Sentiment

Which topics sparked great interest in online discussions in Q2?

Positive Drivers



Rail travel



Cultural experiences, beyond sightseeing



Major cultural events

Negative Drivers



Travel disruptions



Extreme weather



Public health concerns

Value of European Tourism

Travel spending outpaced arrivals in most reporting destinations, suggesting higher spend per visitor than a year earlier.

Inbound travel spend, 2026 YTD (% change vs 2025)



Risks to European Tourism Growth

The top challenges in 2026 include increasing **costs of flights, business, and accommodation**. Travel disruptions linked to the Middle East conflict remain a major challenge, but European sentiment is less negative than global sentiment.

Key Source Market Performance *

Intra-European



+38%
Arrivals
-13%
Arrivals

Croatia (**+38%**) and Ireland (**+32%**) recorded the highest growth in arrivals. Iceland experienced the largest decrease in German arrivals.



+49%
Arrivals
-22%
Arrivals

Greece experienced the strongest growth in arrivals, followed by Slovenia (**+38%**). Bulgaria saw the steepest decline in British arrivals.

Non-European



+82%
Arrivals
-26%
Arrivals

Luxembourg was the best performing destination in arrivals. Cyprus recorded the largest decrease in American arrivals, followed by Greece (**-9%**).



+125%
Arrivals
-21%
Arrivals

Romania recorded the highest number of arrivals, followed by Slovakia (**+78%**). Montenegro posted high drops in arrivals.

* Visits to selected destinations, 2026 YTD (% Year). All data are relative to 2025 levels.

To access the full report and dive deeper into the detailed results, click here to download your copy.



FULL REPORT

