
Long-Haul Travel Barometer 2/2026



Travel horizon:
May-August 2026



EUROPEAN
TRAVEL
COMMISSION

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Methodology

Target

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

Data collection period

- 7-19 April 2026
- Travel horizon: May-August 2026

Frequency

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

Analysed samples

- Total respondents: 7,117
- Respondents likely to travel long-haul to Europe: 2, 612
- Respondents likely to travel long-haul but not to Europe: 1,126
- Respondents not likely to travel long-haul: 3,379

Method

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

Significant changes

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

Increase ▲ Decrease ▼



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

Travel intention and barriers

Travel horizon:
May-August 2026

Sample size
per market 1,000, unless
otherwise specified

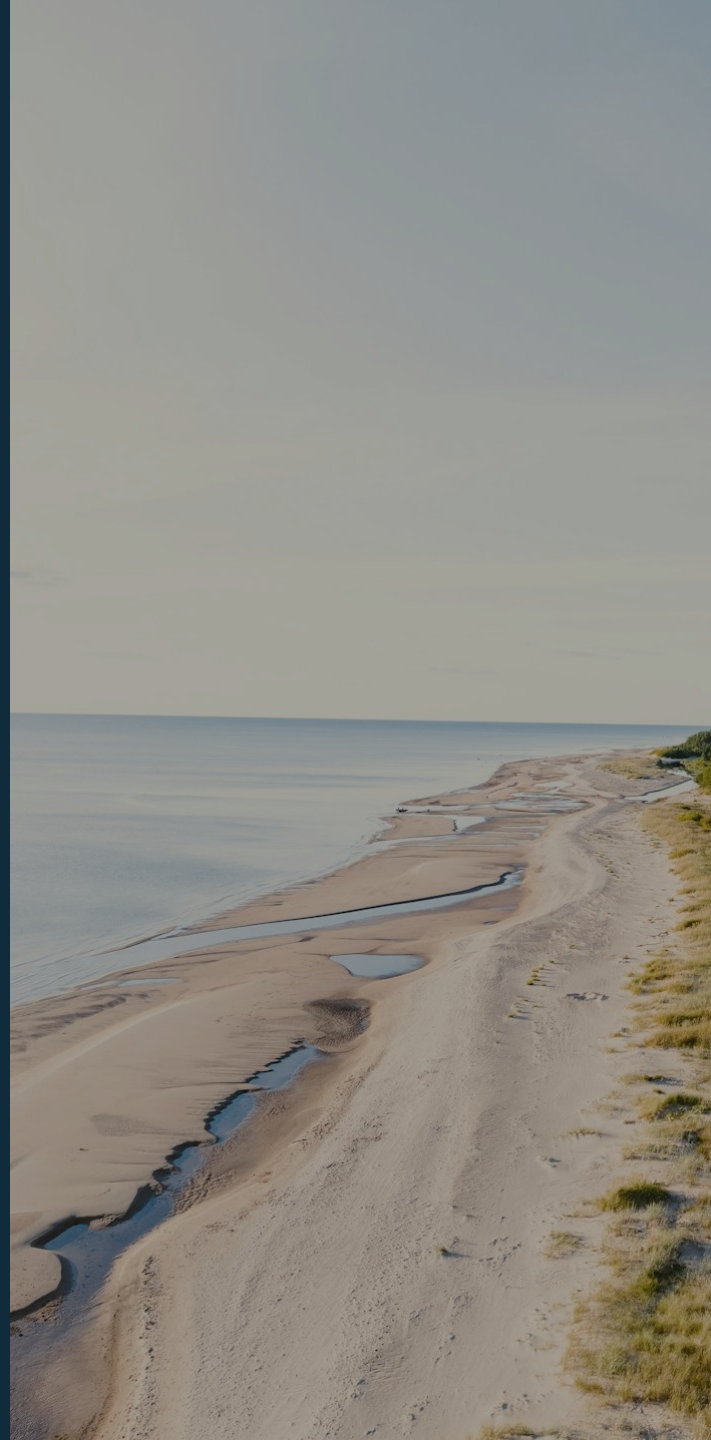


01

Travel sentiment highlights

Global appetite for long-haul travel continues to soften, down from 57% last summer to 52% now. While Europe has not escaped this trend, the region continues to capture a substantial share of long-haul demand and remains highly competitive relative to other world regions.

The slowdown appears to reflect broader caution around long-haul travel, driven by rising costs and geopolitical uncertainty, rather than any deterioration in Europe's attractiveness.



Travel intent highly uneven across markets

- China (63%) and Brazil (47%) continue to record the strongest intention to visit Europe, remaining well above the seven-market average (36%).
- Travel sentiment remains stable in Canada (40%) and Japan (14%), where intention to visit Europe has either held steady or improved marginally compared to summer 2025.
- By contrast, the US (28%) and South Korea (28%) have now recorded declines for a third consecutive summer, while Australia (33%) also posts a marked year-on-year decrease.

Not all travel intent converts equally

The extent to which travel intentions translate into bookings also varies across markets.

- China combines the highest travel intent with the strongest conversion rate, with around 60% of intending travellers already having booked a flight to Europe. Brazil and South Korea also show relatively strong conversion (48% and 50%, respectively).
- In contrast, Canada presents the largest gap between intention and booking despite recording the third-highest travel intent, only one-third of prospective travellers have booked so far.
- Conversion rates in the US, Japan and Australia fall in the mid-range, suggesting that a substantial share of travellers in these markets are still considering or planning their trips.

Travel barriers Highlights

Cost remains the primary reason travellers opt out of Europe, though its influence is easing year on year. Nearly 40% of those planning a long-haul trip but not considering Europe cite travel costs they cannot afford (-9%).

Plans to visit other destinations (16%) and limited vacation time (11%) account for most of the remaining responses.



Cost remains a stronger barrier than geopolitics

- Among travellers who have ruled out Europe, 15% cite a geopolitical factor, including tensions in the Middle East (8%) or the war in Ukraine (7%).
- In the markets whose flight routes to Europe are among the most affected (Japan, St. Korea and Australia) - results suggest that concerns about higher airfares or longer flight times are present but relatively limited: around 14% of Japanese and 12% of Australians cite either increased costs or longer journey times as a barrier, suggesting that even in the most exposed markets, affordability remains a more important barrier than conflict-related disruptions.

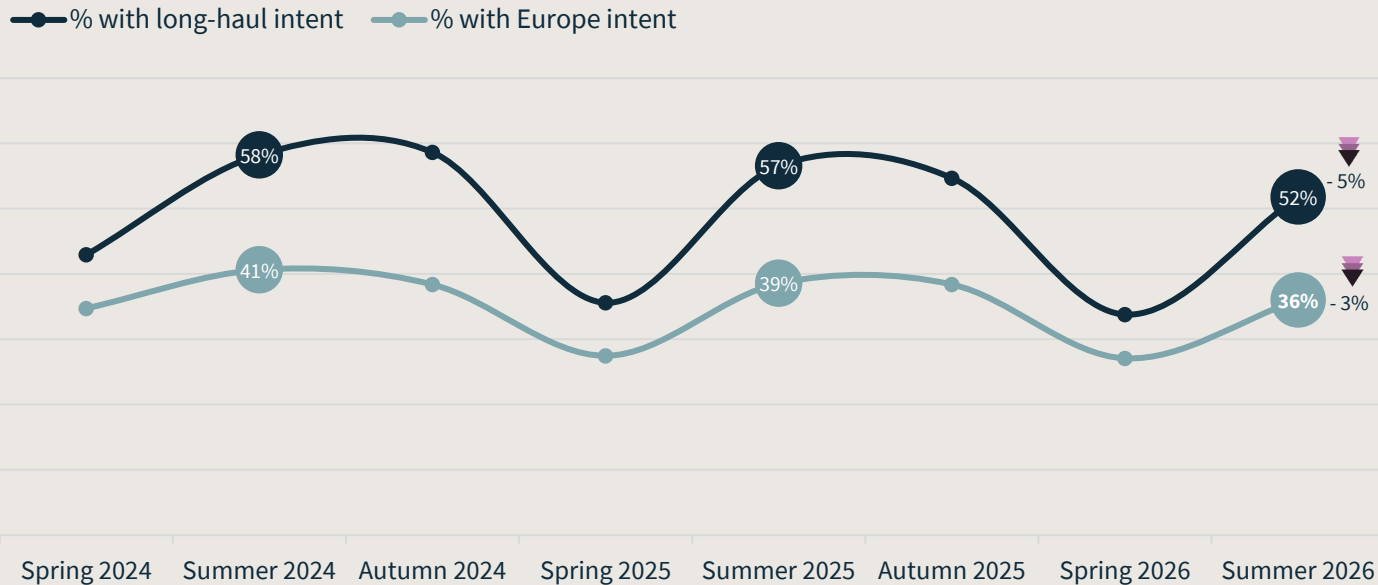
Europe's safety advantage remains intact

- Despite the heightened geopolitical uncertainty, Europe continues to be perceived as the safest region globally, across every one of the five safety dimensions measured - political stability, personal safety, conflict/terrorism, tourist-local tensions and natural hazards.

Global sentiment for long-haul travel keeps cooling, Europe included, but less so

Evolution of long-haul and Europe travel intent, 2024–2026

% of respondents with positive travel intent across all markets



How to read the chart: The dark line shows the share of all respondents with positive long-haul intent, while the light line shows the share with positive intent toward Europe, weighted to the total sample. The gap between the lines is long-haul travel intent, not directed at Europe. Significant differences are reported year-on-year.

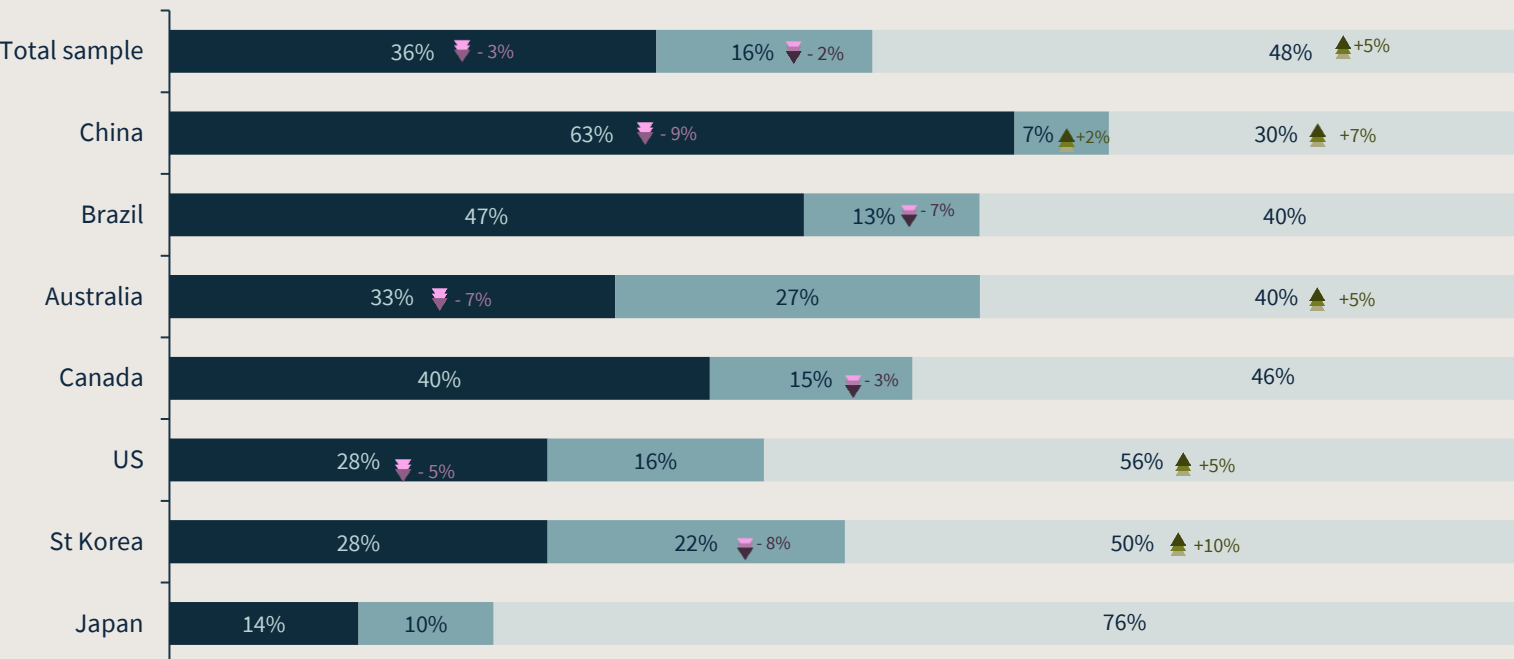


Europe remains competitive, but the bigger challenge is the broader decline in long-haul travel appetite

In the US and Japan, low travel appetite is a bigger barrier to European demand than competition from other long-haul destinations, while Australia and South Korea show stronger diversion to alternative destinations

Long-haul travel intention by market, summer 2026 vs summer 2025

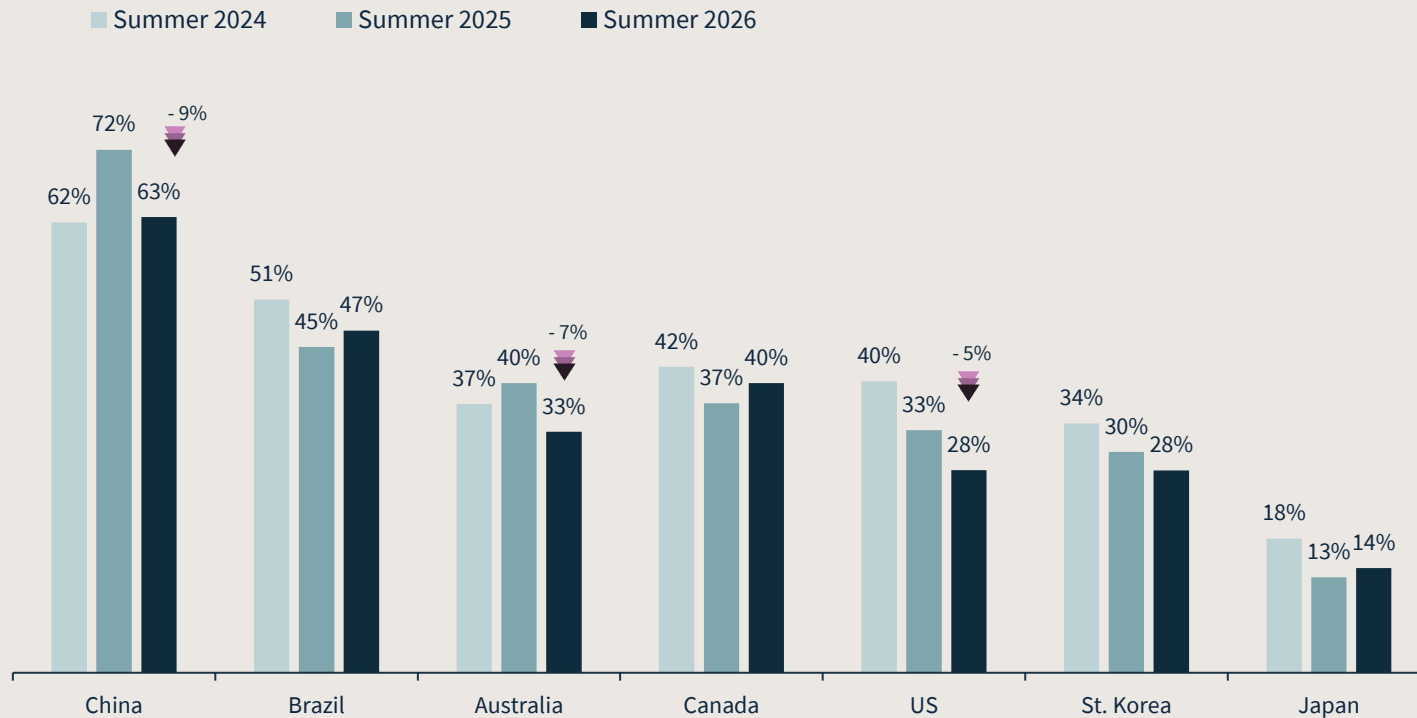
■ Intend to travel to Europe ■ Intend to travel to another long-haul destination ■ Do not intend to travel long-haul



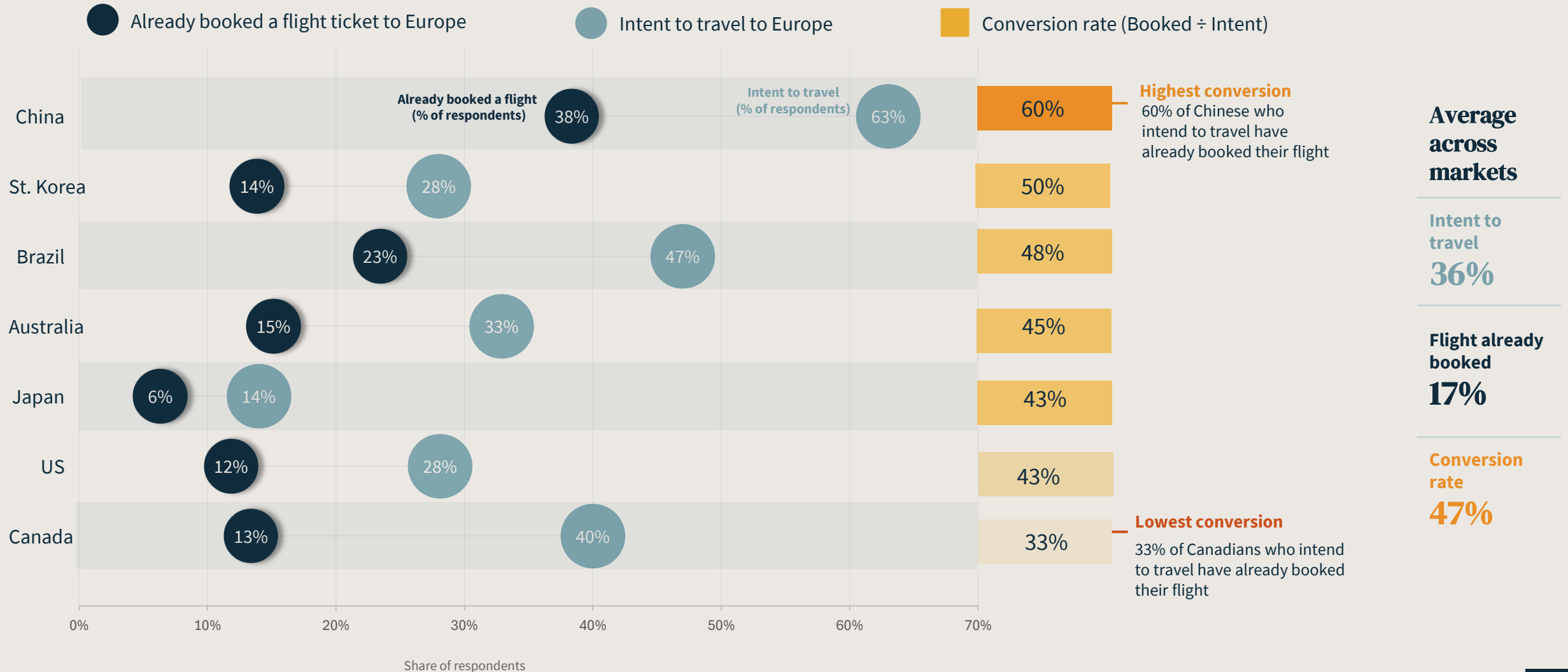
Interest in visiting Europe varies significantly across source markets

China and Brazil continue to lead demand, while travel sentiment softens in the US, South Korea and Australia

Travel intention to Europe — Summer horizon (% likely to visit Europe)



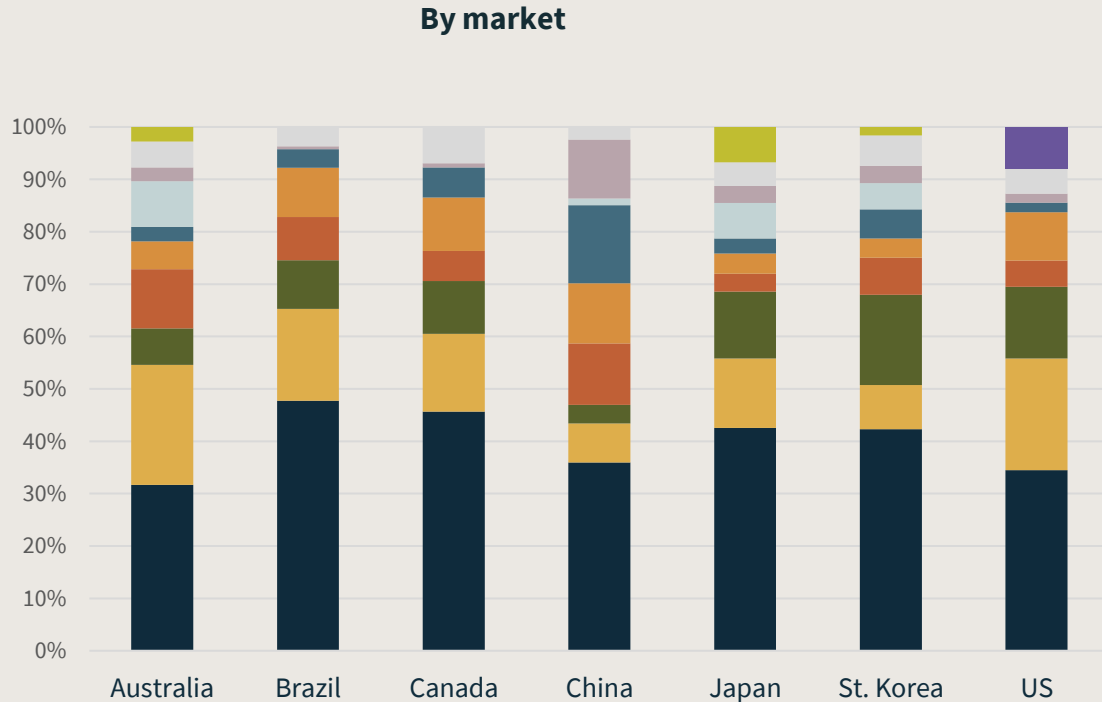
Chinese travellers show the highest conversion of interest into bookings, while Canadians remain in planning mode



How to read the chart. For each market, the graph shows two figures: the share of respondents who intend to travel to Europe (light blue) and the share who have already booked a flight (dark blue), which is a subset of those who intend to travel. Conversion rate = Booked ÷ Intent (e.g. China: 38 ÷ 63 = 60%).

Geopolitical concerns are becoming more visible, but costs remain the main barrier

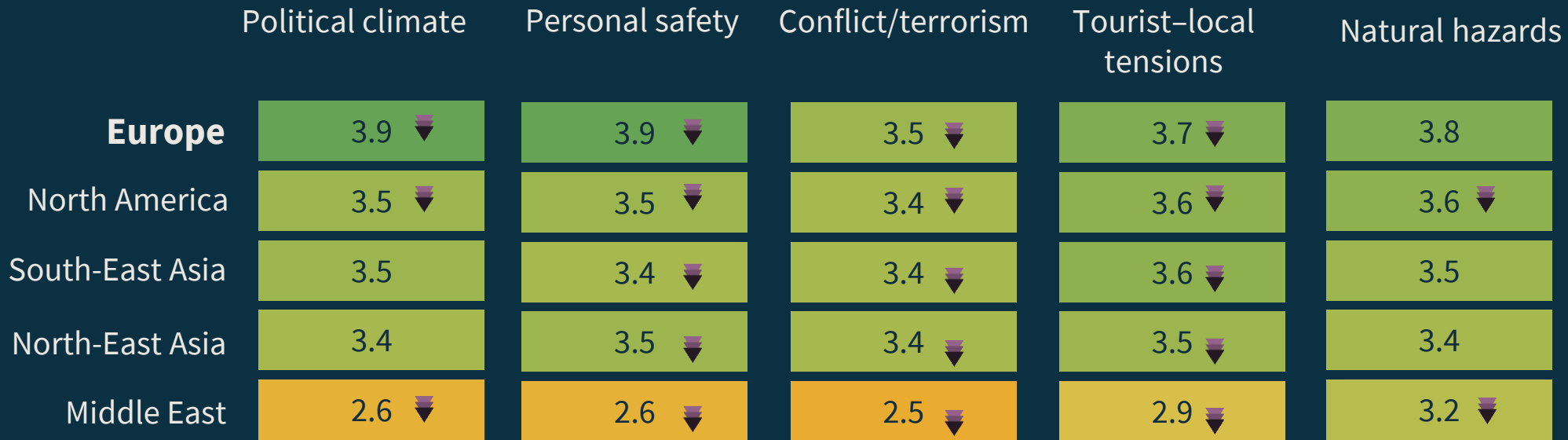
Barriers to travelling to Europe in summer 2026



* Answer option only given to respondents from Japan, St Korea and Australia | ** Answer option for US respondents only

The sample comprises respondents from all markets who intend to travel long-haul in summer 2026, but not to Europe.

Europe remains the world's safest-rated region despite geopolitical tensions



**Significant differences on this slide are measured against LHTB 1/2026, conducted before the Middle East escalation and resulting Europe-Asia airspace disruptions in March 2026. The sample consists of respondents who intend to travel long-haul between May-August 2026, N= 3738*

Summer Outlook

Travel horizon:
May-August 2026

Sample of respondents
likely to travel to Europe
(N=2,612)

02

Summer outlook Highlights

For those who intend to travel, the summer trip to Europe is, above all, a holiday. Most travellers still plan to stay for one to two weeks and spend €100–200 per person per day, but compared to summer 2025, there are signs of growing budget awareness.

The share expecting to spend €100–200 per day has declined, while more travellers now anticipate spending €50–100. At the same time, shorter trips are becoming more common, with the proportion planning stays of less than a week increasing from 16% to 22%.

Safety leads destination choice (44%), ahead of renowned attractions (39%) and good tourism infrastructure (38%), while the importance of good train connections is a rising factor (23%, up 3 points on last summer).



Connectivity is becoming a more important part of Europe's appeal

- Nearly three in four travellers (74%) plan to visit multiple countries during their trip, averaging close to four destinations and reinforcing Europe's unique appeal as a seamless multi-country destination.
- While low-cost air remains the most popular transport option (47%), rail is gaining momentum: both rail passes (42%) and point-to-point tickets (40%) increased significantly year-on-year.
- Value for money, reliability and safety are driving rail's growing appeal, while better rail connectivity is also becoming a more important factor when choosing a destination.

Experience-led travel continues to shape spending

- Culture and history remain Europe's strongest draw (43%), followed by city life (32%), gastronomy (32%) and nature (28%).
- Spending intentions mirror these preferences, with food and drinks (67%) and activities (49%) attracting the largest share of travellers' budgets.
- Year-on-year, planned spending on shopping and accommodation has declined (-5% and -3% respectively), while wellness spending has increased (+2%), signalling a continued shift towards experiences, personal enrichment and wellbeing.

Summer is a
leisure season

Leisure

71%

Business

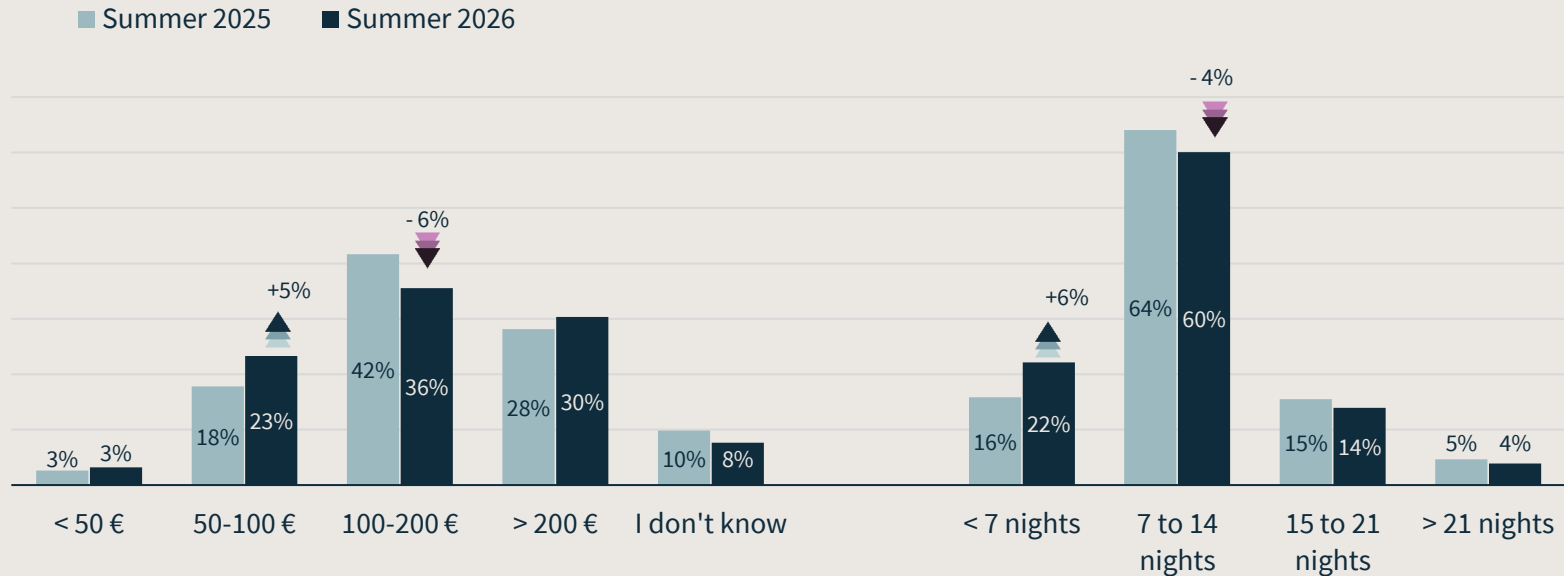
11%

Visiting friends
and relatives

9%

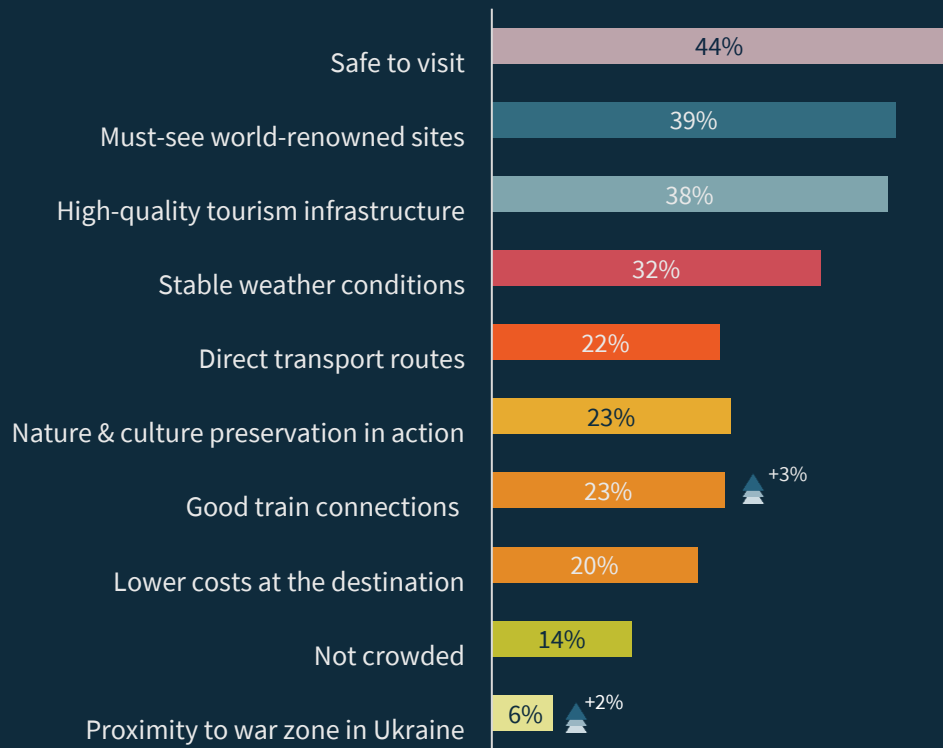
Leisure travellers are shortening their stays and spending more cautiously

Intended daily budget and length of stay of leisure travellers - summer 2026 vs 2025



Destinations are chosen for safety first and, increasingly, for good rail links

Destination selection criteria



What signals safety to travellers?

41%

Low crime rates

as communicated in the media

38%

Visible security presence

police, security cameras

37%

Clean, well-maintained

hotels, attractions, transport

35%

Political stability

as communicated by media and government reports

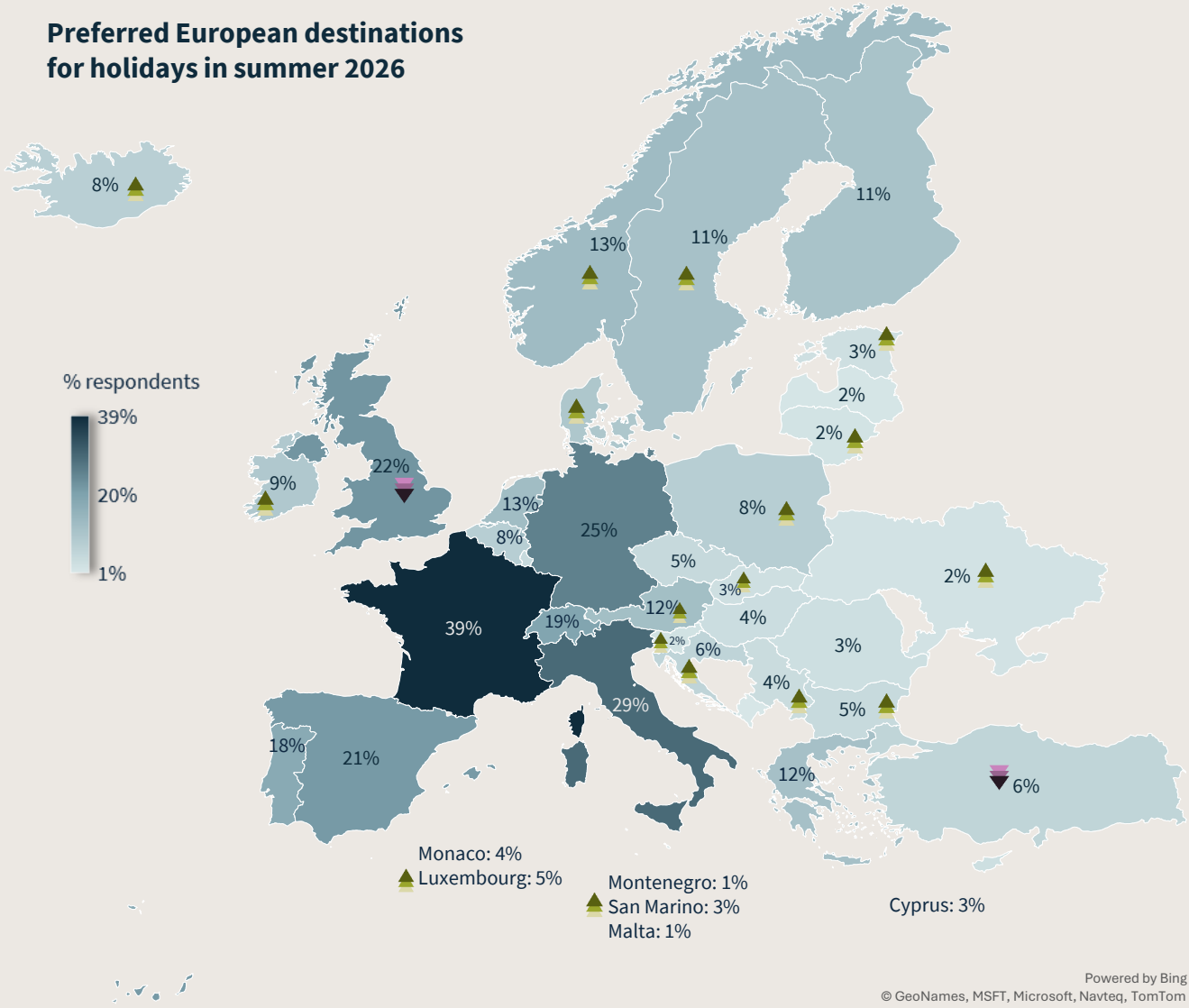
32%

Friendly locals

traveller reviews and recommendations

Travellers are increasingly looking beyond Europe's traditional favourites

Preferred European destinations for holidays in summer 2026



Significantly **more** ▲ **less** ▼ respondents plan to visit this country compared to a year ago (May-August 2025)

Regional interest

Southern/ Mediterranean Europe	73%
Western Europe	49%
Northern Europe	48%
Central Europe	16% ▲ +3%
Eastern Europe	13% ▲ +5%

Respondents can select more than one country, so figures show the share of travellers naming at least one destination in each region and do not add up to 100%

One trip,
many countries

74%

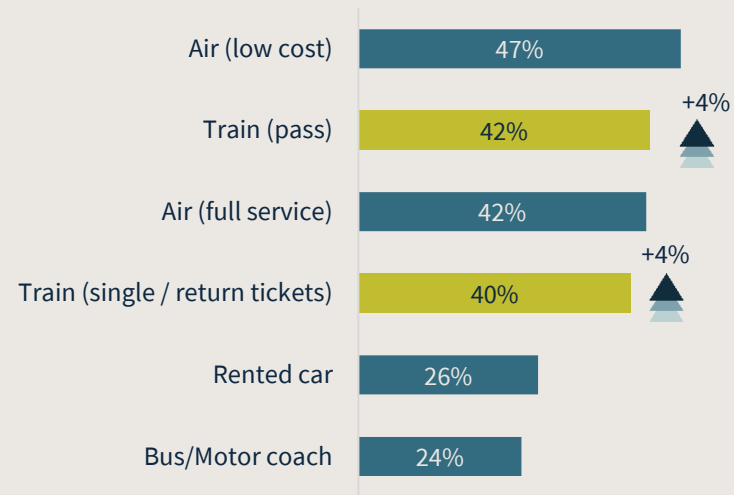
plan multiple-
country trips

3.6

average number of
countries mentioned

Increasingly by train

Preferred modes of transportation for
cross-country trips



For value, reliability and safety

Top reasons for choosing train travel
between European countries

43% **Good value for money**
Especially important for Australians,
Brazilians, and Canadians

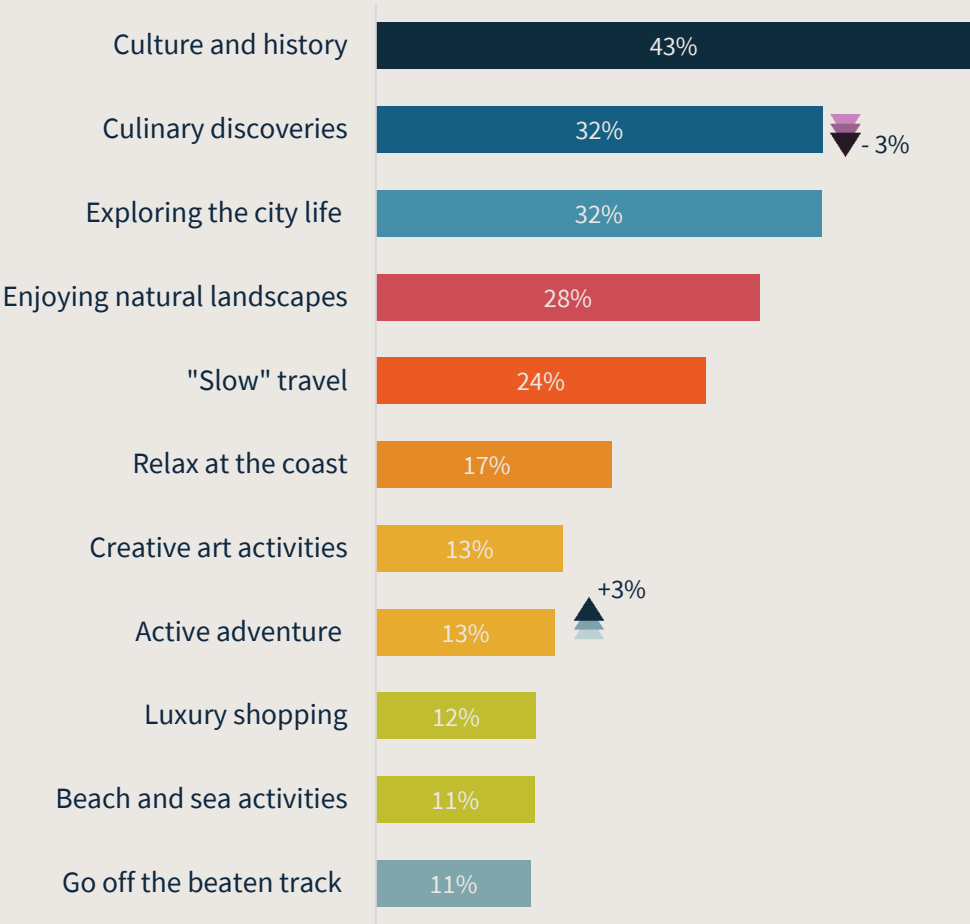
30% **Reliability**
Most valued by the Chinese,
Japanese and Koreans

30% **Safety**
Most valued by the Chinese,
Japanese and Koreans



Europe's pull: stories to explore and tables to discover

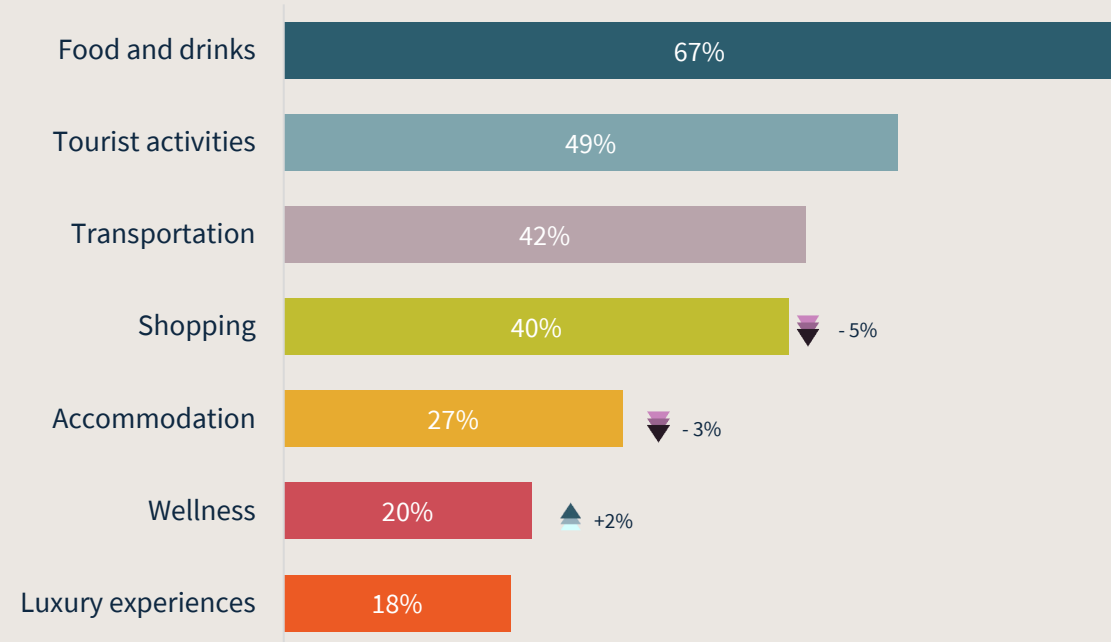
Most wanted activity types to try in Europe this summer





Travellers continue to prioritise spending on food, activities and mobility, while becoming more selective about shopping & accommodation expenditure

Holiday spending priorities



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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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