



ETOA

BETTER TOURISM IN EUROPE

DESTINATIONS EXCHANGE EUROPE 2025

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Emerging Trends in Travel Demand | Inbound Domestic Trends & Insights

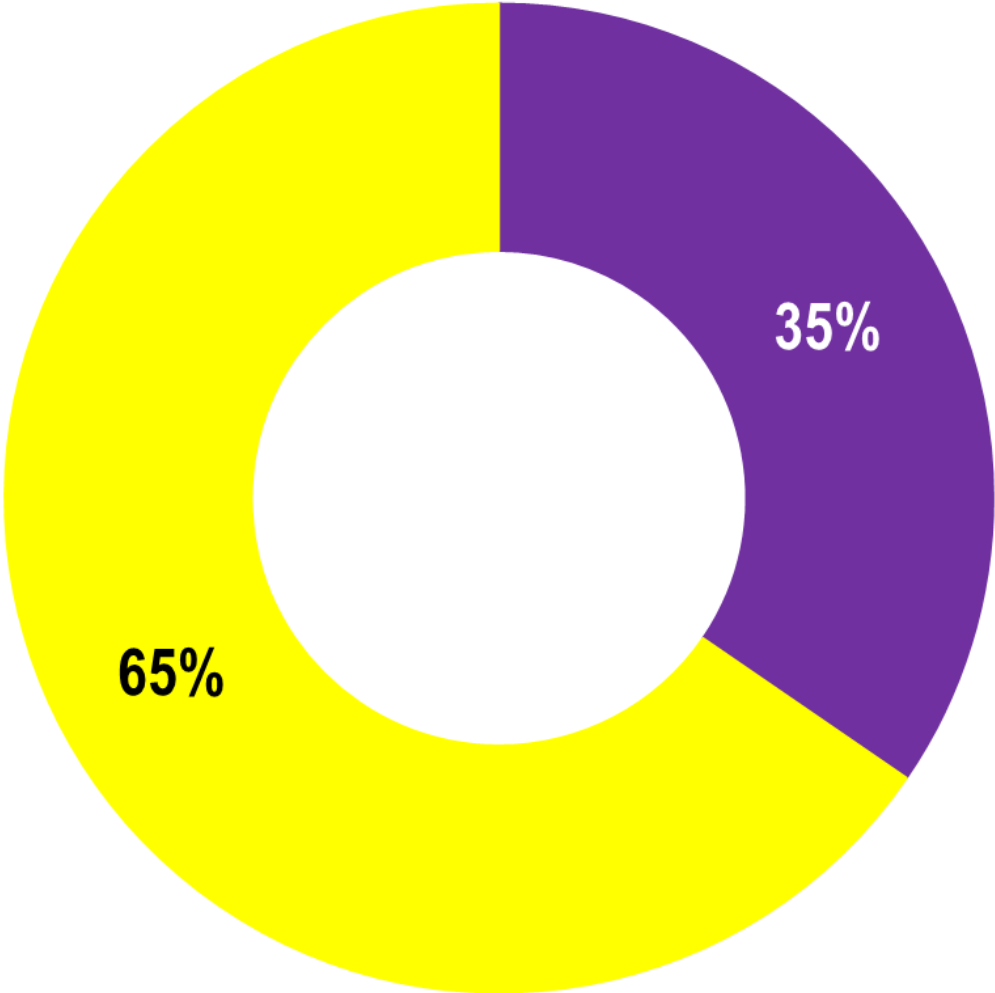
- David Edwards, Tourism Insight Expert, ETOA

Inbound and domestic trends and insights

June 2025



Visitor spending in Europe (2024 estimates)

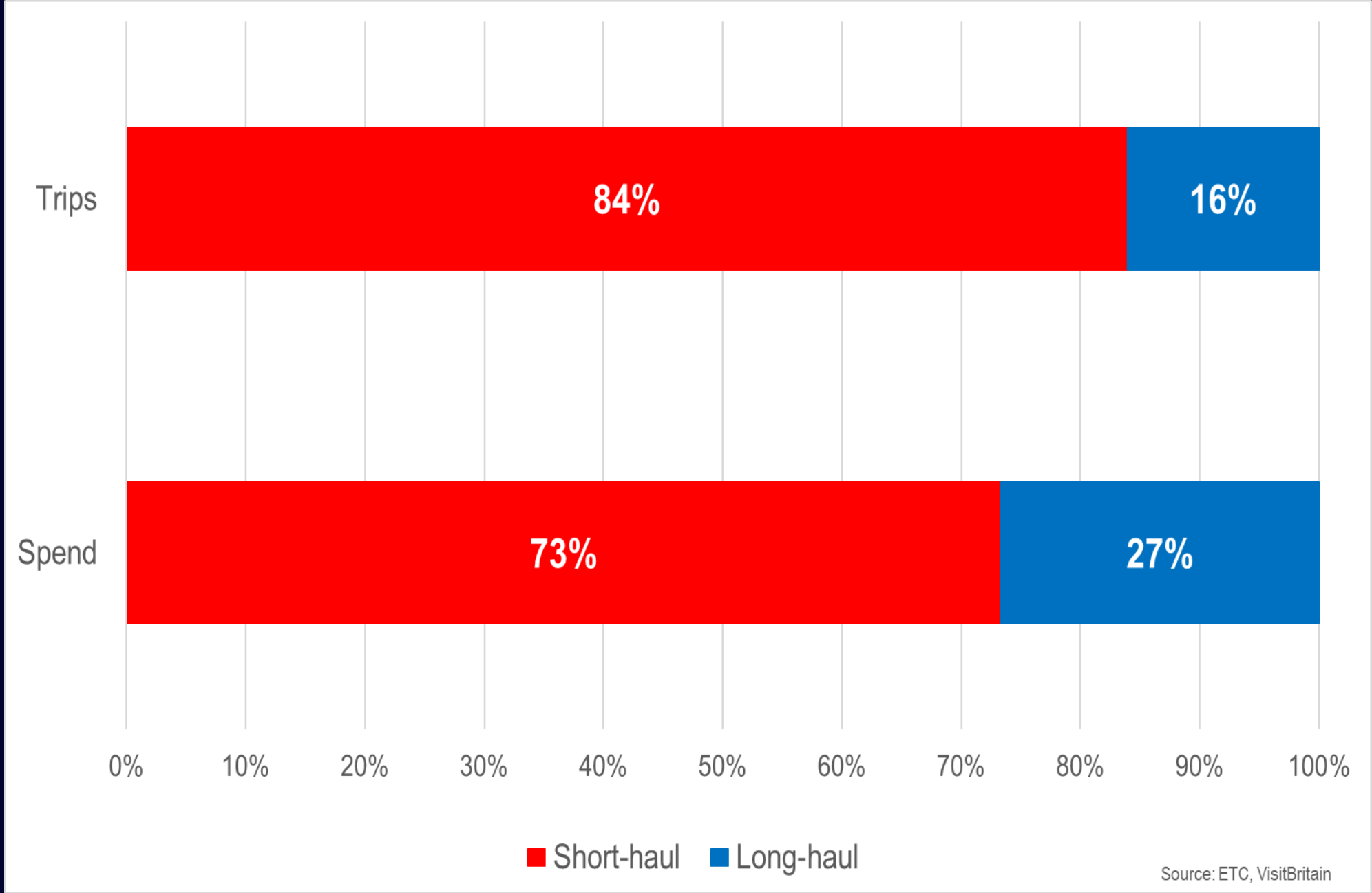


■ International visitor spending

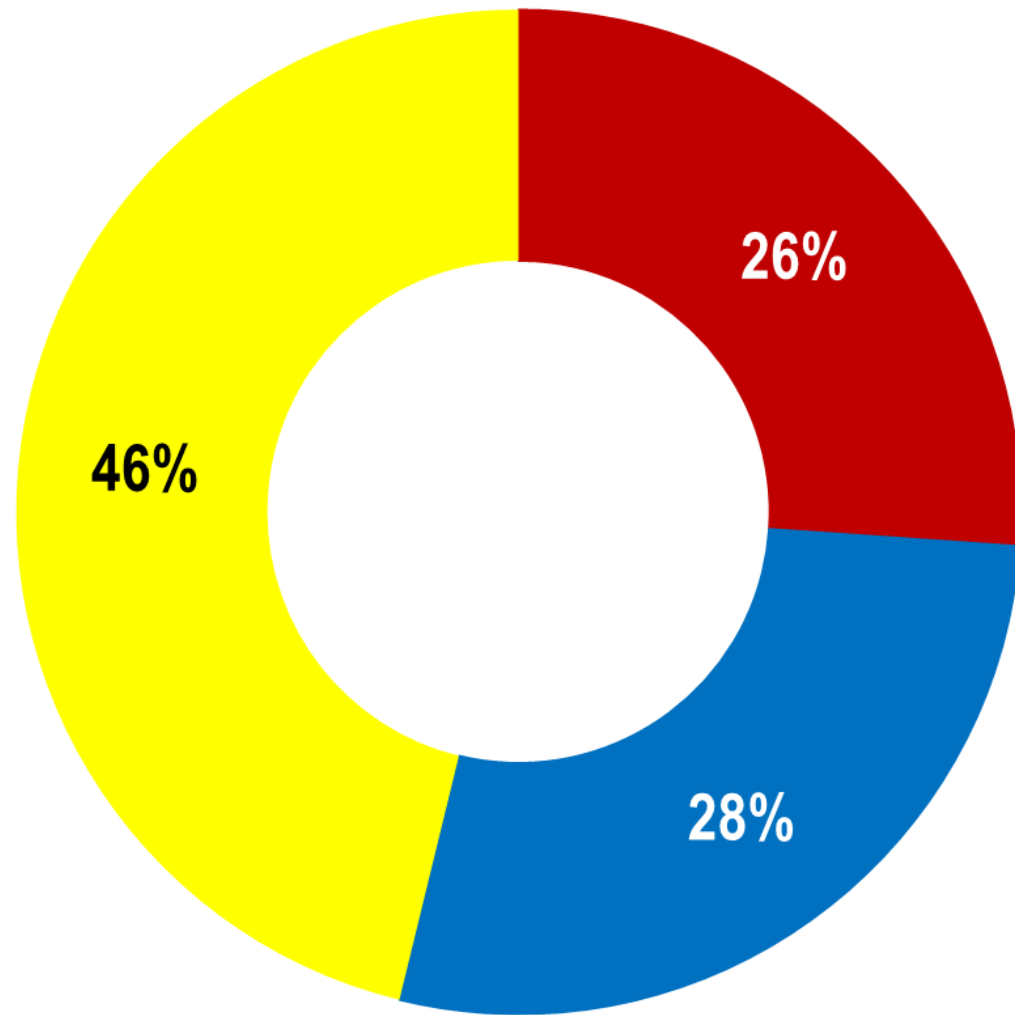
■ Domestic visitor spending

Source: WTTC

Origin of international trips and expenditure in Europe



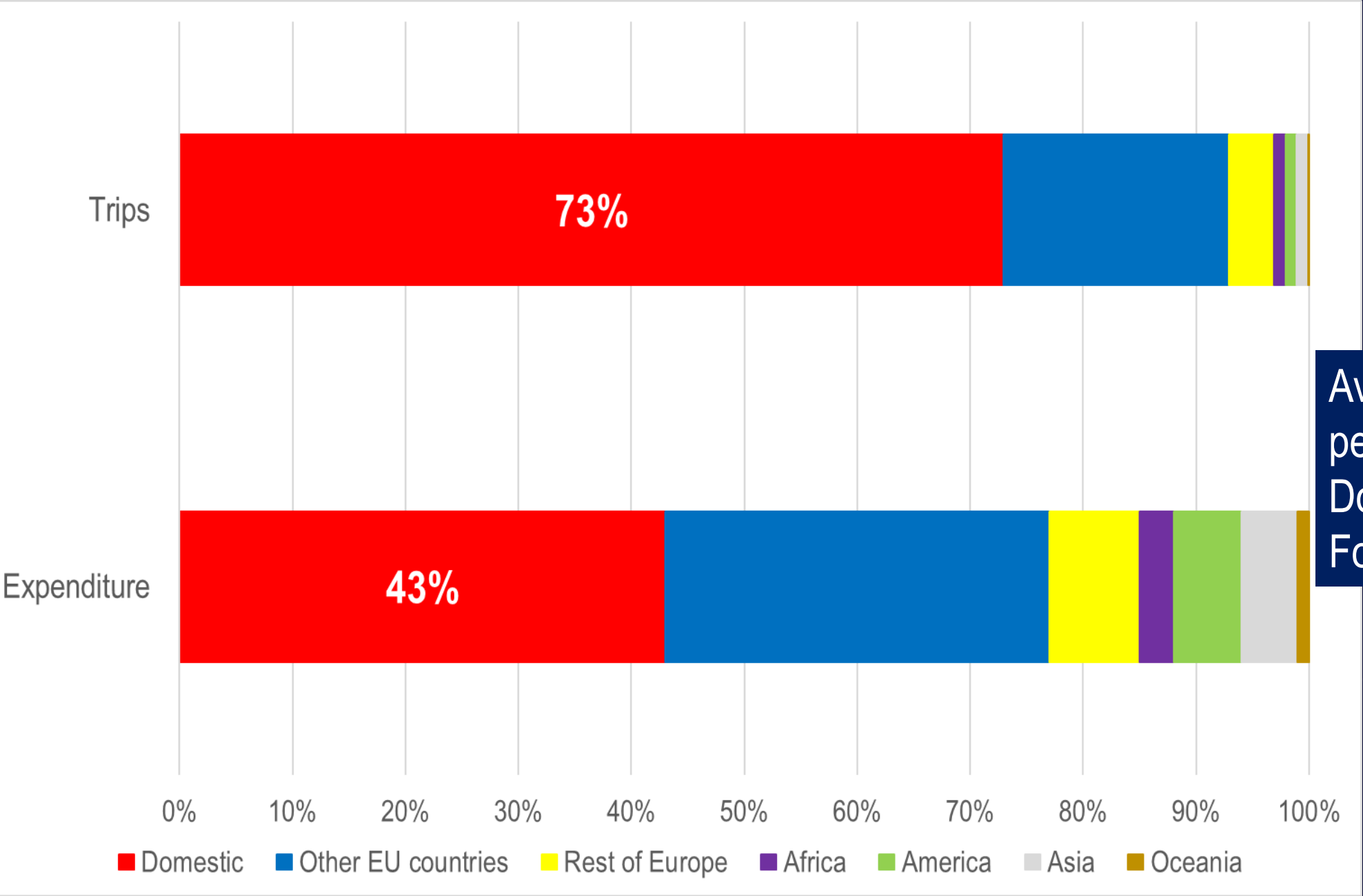
Visitor spending in Great Britain



■ Inbound tourism (Yr to Jun 24) ■ Domestic overnight tourism (2024) ■ Domestic tourism day visits (2024)

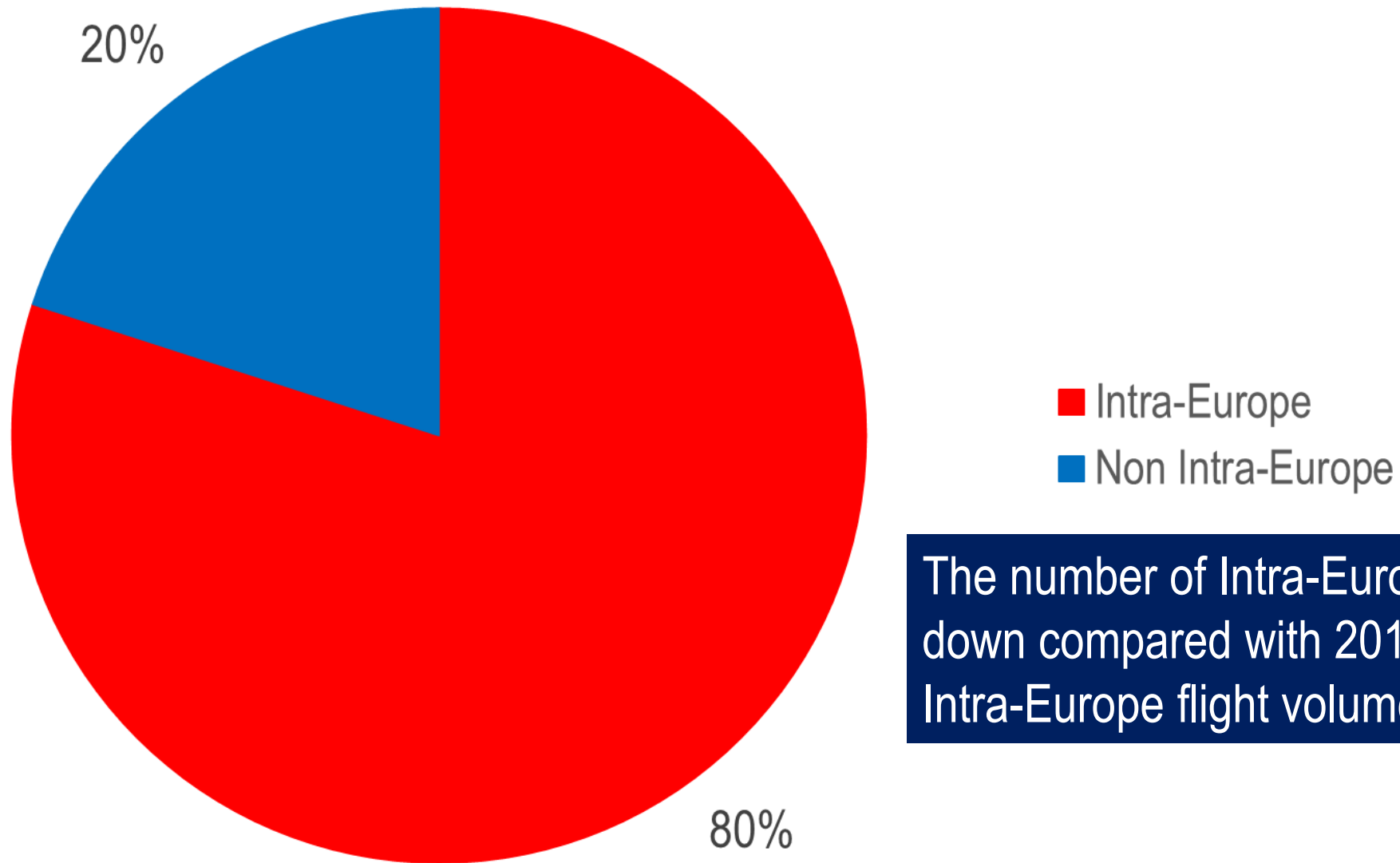
Source: VisitBritain

Trips and expenditure by EU citizens, by destination in 2023



Average expenditure
per trip:
Domestic €289
Foreign €1,013

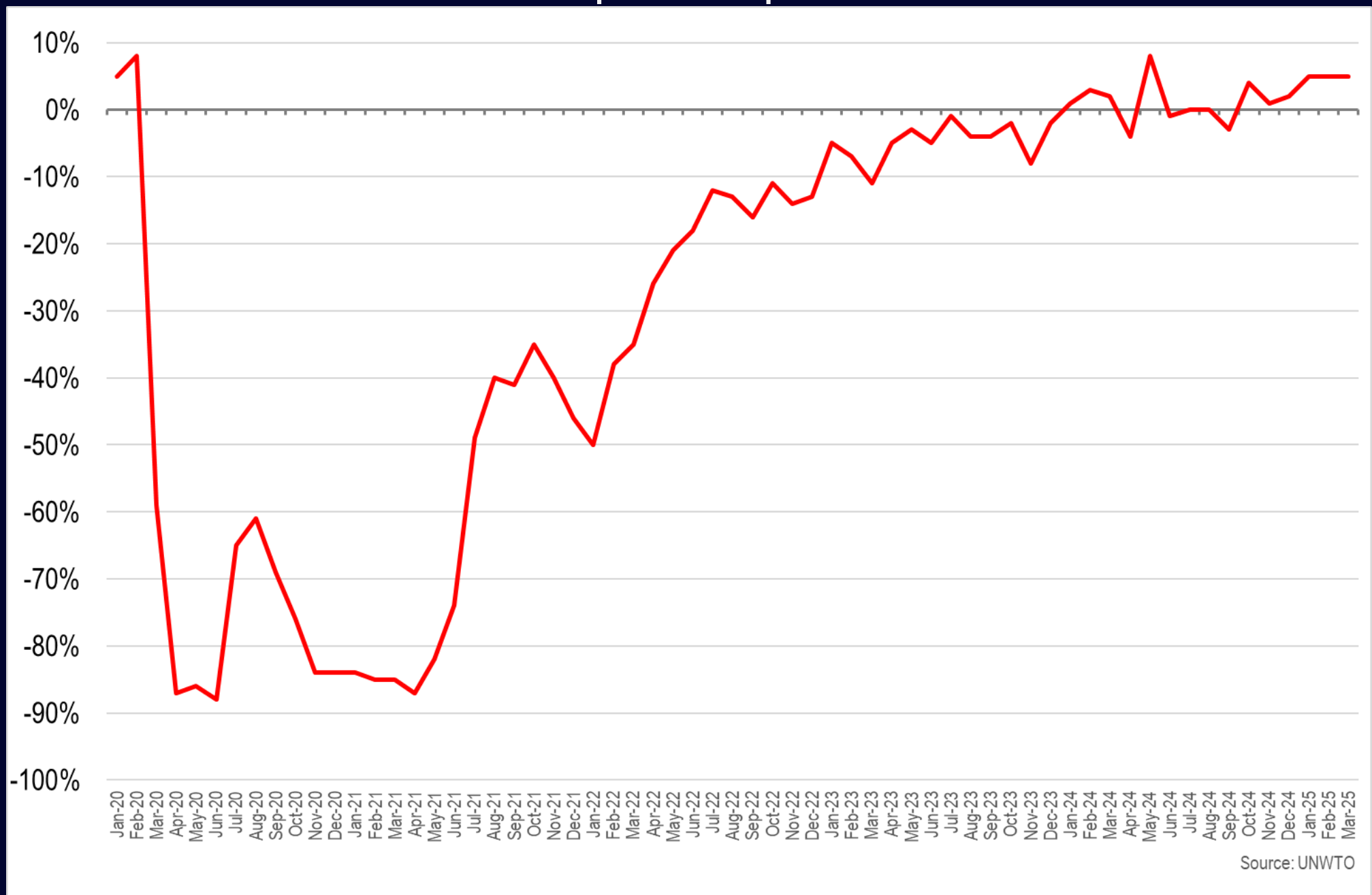
Flight arrivals/departures in Europe (1 January – 11 May 2025)



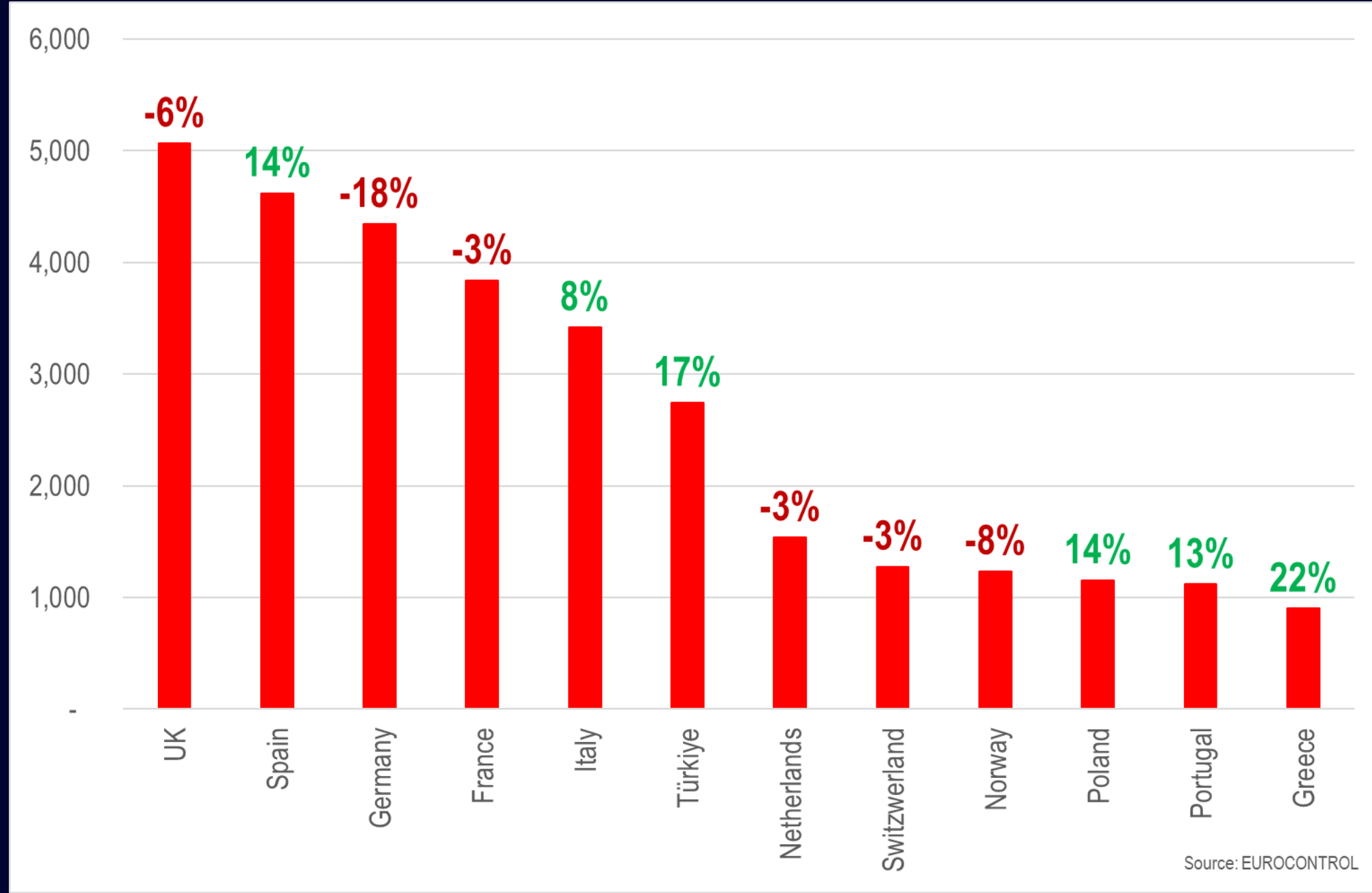
The number of Intra-Europe flights is 1% down compared with 2019, whereas Non Intra-Europe flight volumes are up 4%

Source: EUROCONTROL

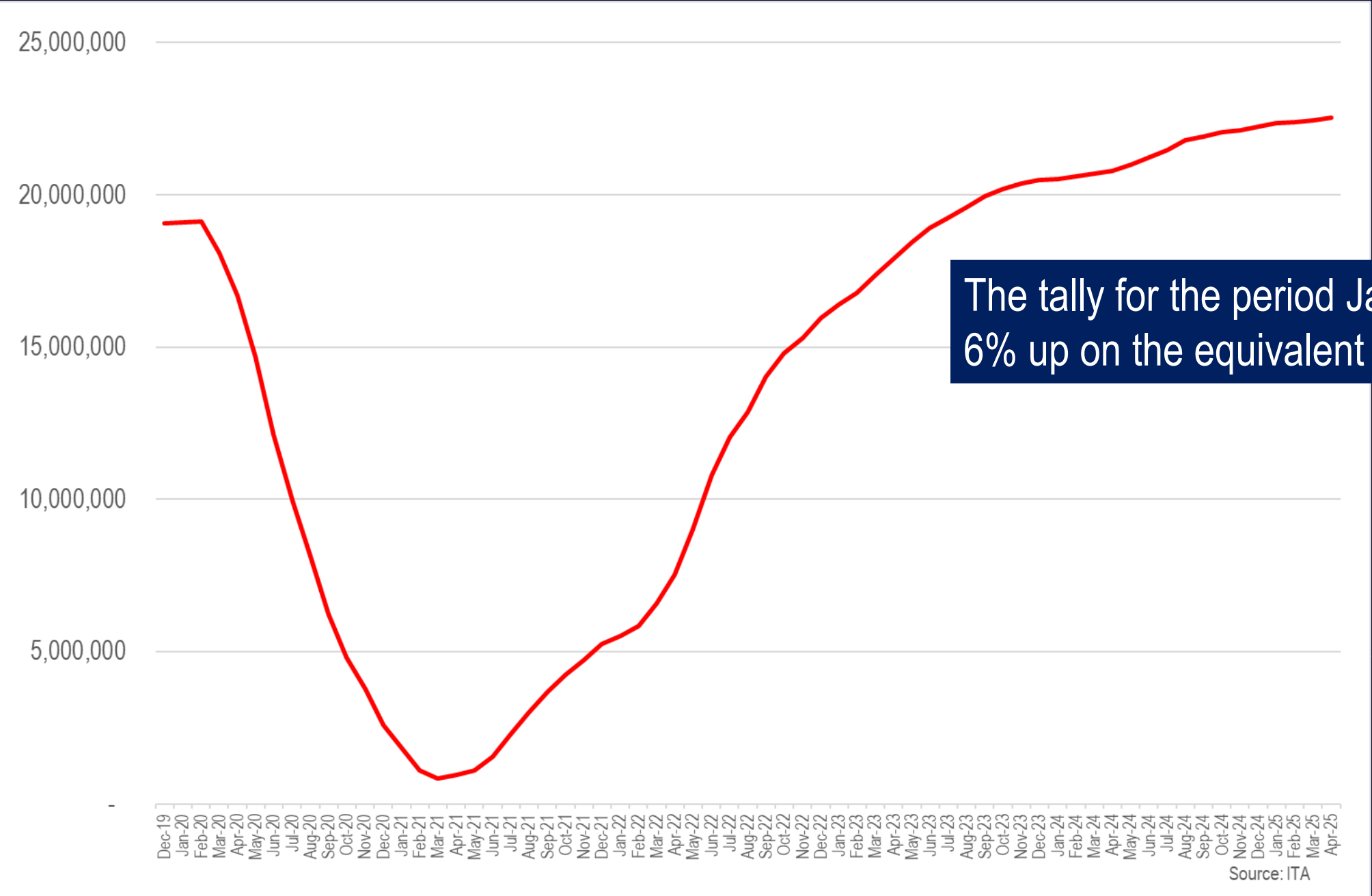
International arrivals in Europe vs equivalent month in 2019



Average daily flight arrivals/departures: year-to-date 2025 and change vs 2019

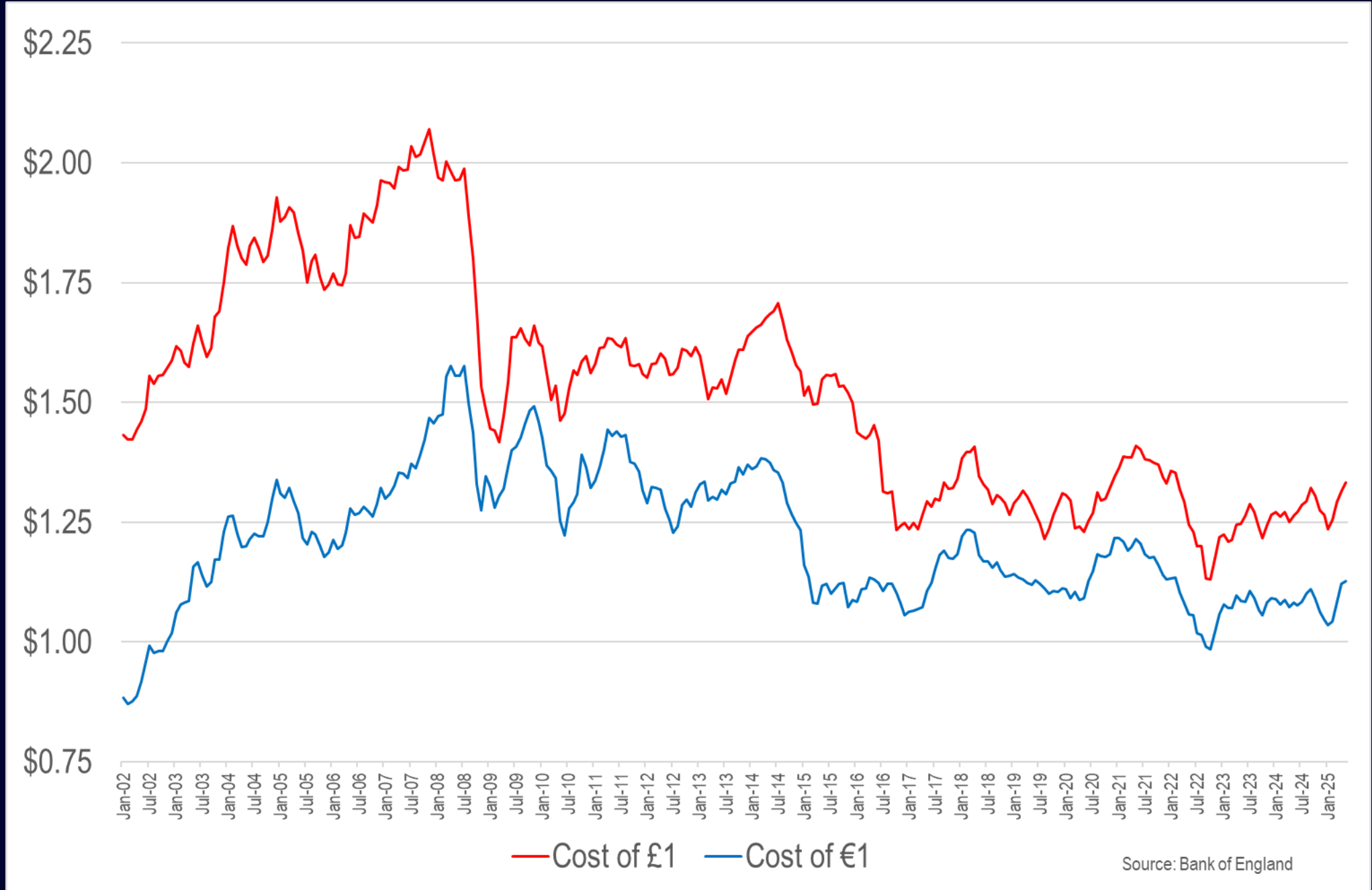


US citizens boarding a plane in the US destined to land in Europe (rolling 12-month tally)



The tally for the period January to April was 6% up on the equivalent period of last year

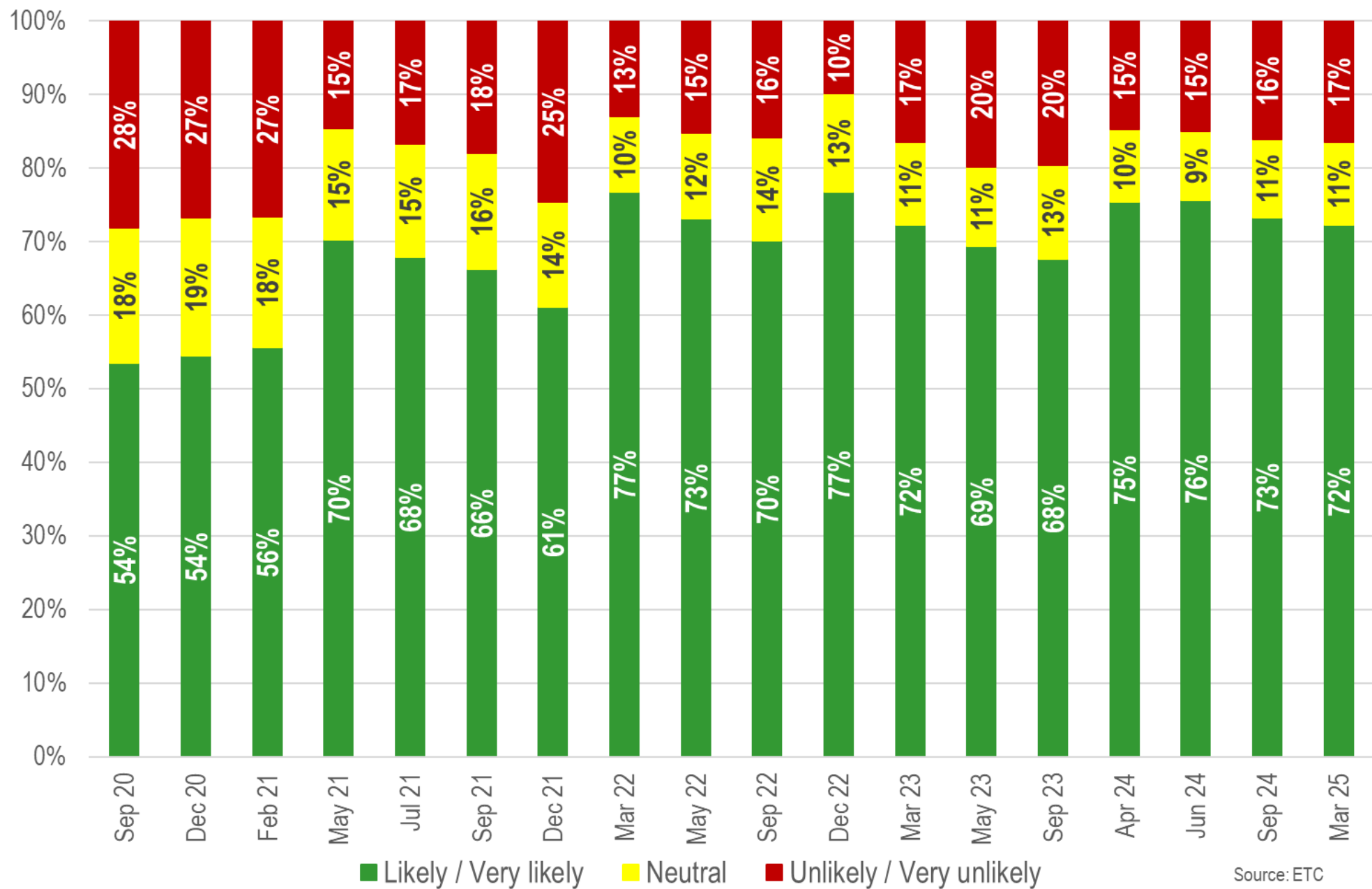
How much it costs Americans to buy pounds or euros



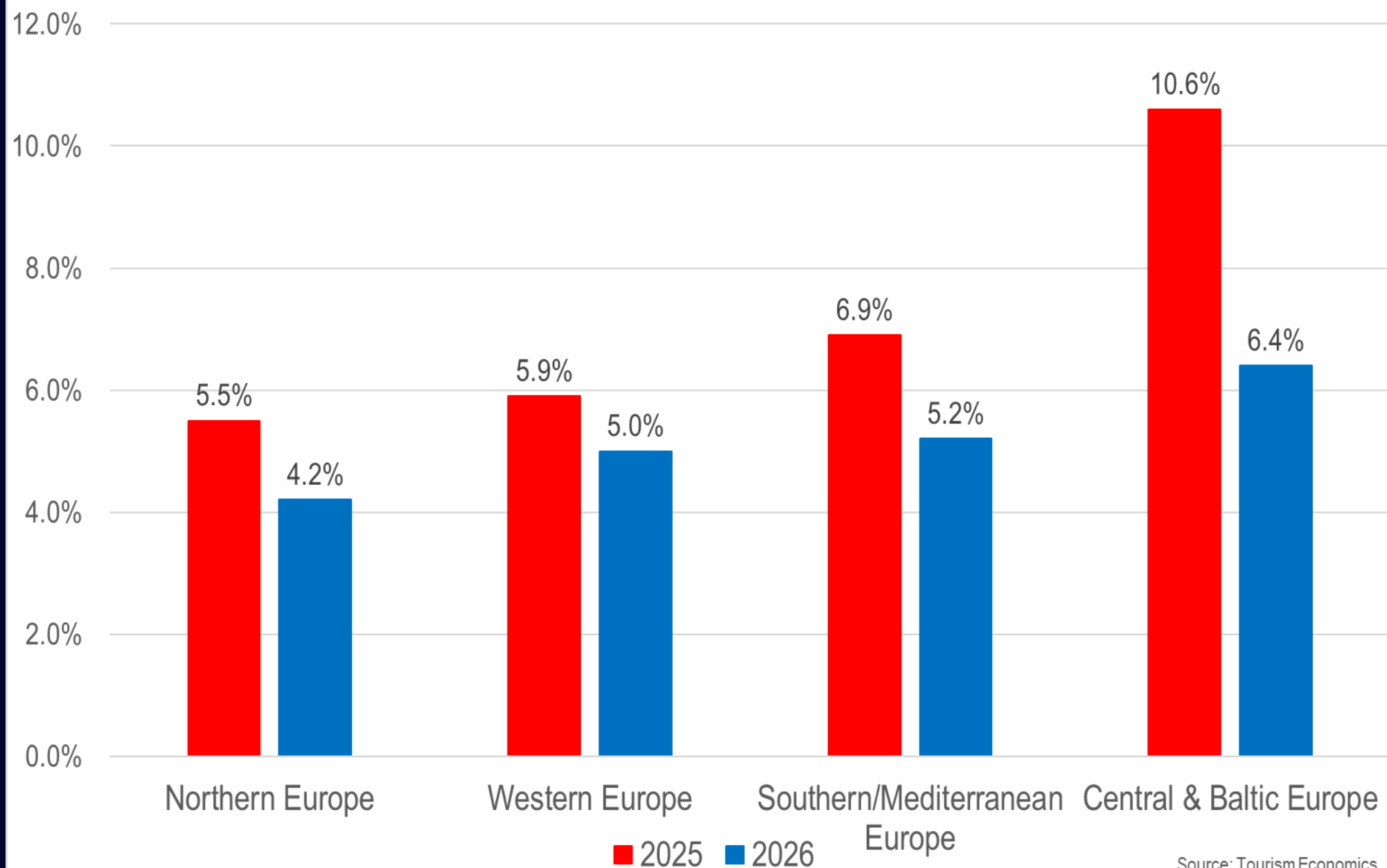
What the IMF is forecasting for real GDP growth

	2025	2026
Australia	1.6%	2.1%
Brazil	2.0%	2.0%
Canada	1.4%	1.6%
China	4.0%	4.0%
France	0.6%	1.0%
Germany	-0.1%	0.9%
India	6.2%	6.3%
Italy	0.4%	0.8%
Japan	0.6%	0.6%
Korea	1.0%	1.4%
Netherlands	1.4%	1.4%
New Zealand	1.4%	2.7%
Saudi Arabia	3.0%	3.7%
South Africa	1.0%	1.3%
Spain	2.5%	1.8%
United Arab Emirates	4.0%	5.0%
United Kingdom	1.1%	1.4%
United States	1.8%	1.7%

Europeans' intention to travel for leisure within Europe



Tourism Economics forecast for inbound tourism growth



Considerations seen as “Extremely important” when deciding on a destination

Offers good value for money	66%
Is a welcoming place to visit	64%
Is good for relaxing, resting, recharging	61%
There is beautiful coast and countryside to explore	61%
I can roam around visiting many types of places	60%
It's easy to get around once there	60%
There is a good variety of food and drink to try	57%
It's easy to get to	55%
Is a place where I can explore history and heritage	54%
Offers lots of different experiences in one destination	54%
It has experiences I can't have anywhere else	53%
There are vibrant towns and cities to explore	53%
for seeing famous sites, places, ticking off the 'must do' list	52%
Is inclusive and accessible for visitors like me	51%
Is good to visit at any time of year	50%
It has surprising and unexpected experiences	48%
Is a mixture of old and new	47%
Has an interesting mix of cultures from around the world	46%
There are interesting local people to meet	45%
It offers the opportunity to travel sustainably/responsibly	44%
Has a thriving arts and contemporary culture scene	41%
A good place for treating myself	40%
A place recommended by friends or family	40%
If I don't visit soon, I'd miss out	35%
Offers experiences I want to share on social media	34%

Findings based on research undertaken by VisitBritain, with percentages being the proportion who scored each aspect as 5, 6 or 7 on a 7-point scale from “not at all important” to “extremely important”



European travellers preferred digital tool to plan their next trip

