Travel Insights 2025
Focus on Europe

May 2024 - April 2025

amadeus | In collaboration with UN Tourism

Contents

Unlocking Europe's tourism opportunities through data and collaboration

Europe stands at a pivotal crossroads for travel and tourism. As international travel demand steadily returns, we are seeing a more dynamic, diversified, and data-driven landscape emerge. Today's travellers are not only revisiting iconic cities but also exploring alternative destinations, travelling across seasons, and engaging in new ways of discovering Europe.

This is more than a recovery—it's a transformation. From shifting source markets and new air routes to evolving booking behaviours and hotel performance, the signs point to a European tourism sector that is rebuilding itself for greater resilience and inclusivity.

At Amadeus, we believe that data-driven insight is essential to making smart, future-ready decisions. This report provides a comprehensive look at the key trends shaping European tourism today—illuminating where travellers are coming from, how they are booking, and where demand is growing. These insights are not just informative; they're instrumental for building strategic plans, optimising operations, and identifying untapped opportunities.

Europe's tourism success now depends on its ability to adapt quickly, act collaboratively, and invest wisely. Whether it's leveraging the growth of air connectivity, activating interest in emerging destinations, or refining digital strategies across hotel channels, this report aims to serve as a practical roadmap for the future of European travel.

Amadeus is pleased to partner with UN Tourism to produce this report, a collaboration to support member destinations in achieving their goals backed by comprehensive industry leading insights. We hope destinations will find the information indispensable as they build an effective strategy to prepare to welcome travellers.

We remain committed to fostering partnerships and providing the tools that enable progress — for travellers, for communities, and for the future of tourism across Europe.

Sincerely,

Javier Campo

amadeus

It is a great honour to present the first “Travel insights 2025 - Focus on Europe”, the outcome of a joint collaboration by Amadeus and UN Tourism.

The competitiveness and sustainability of our sector increasingly lies in actionable data-driven market analysis. At UN Tourism, we are committed to strengthening the capacity of our members to access strategic data and enhance market intelligence. Reliable and up-to-date data is more critical than ever for the effective management of tourism and to be better prepared in an ever-evolving tourism landscape.

Europe is the world’s largest destination. In 2024, the region welcomed 756 million international tourist arrivals, 52% of world’s total. But more significantly, European destinations earned EUR 670 billion (USD 725 billion) in export revenues from international tourism, a remarkable 20% increase over 2019 levels (in real terms).

We are pleased to collaborate once again with Amadeus, one of our valuable Affiliate Members, in making this report a reality. It covers key trends for the first four months of 2025 and provides valuable insights based on different sources, as well as industry indicators such as destination searches, airline bookings, and hotel occupancy rates.

I trust this report and its valuable insights will contribute to a better understanding of the market dynamics of the region and support the adequate strategies to achieve a resilient and sustainable tourism.

Sincerely,

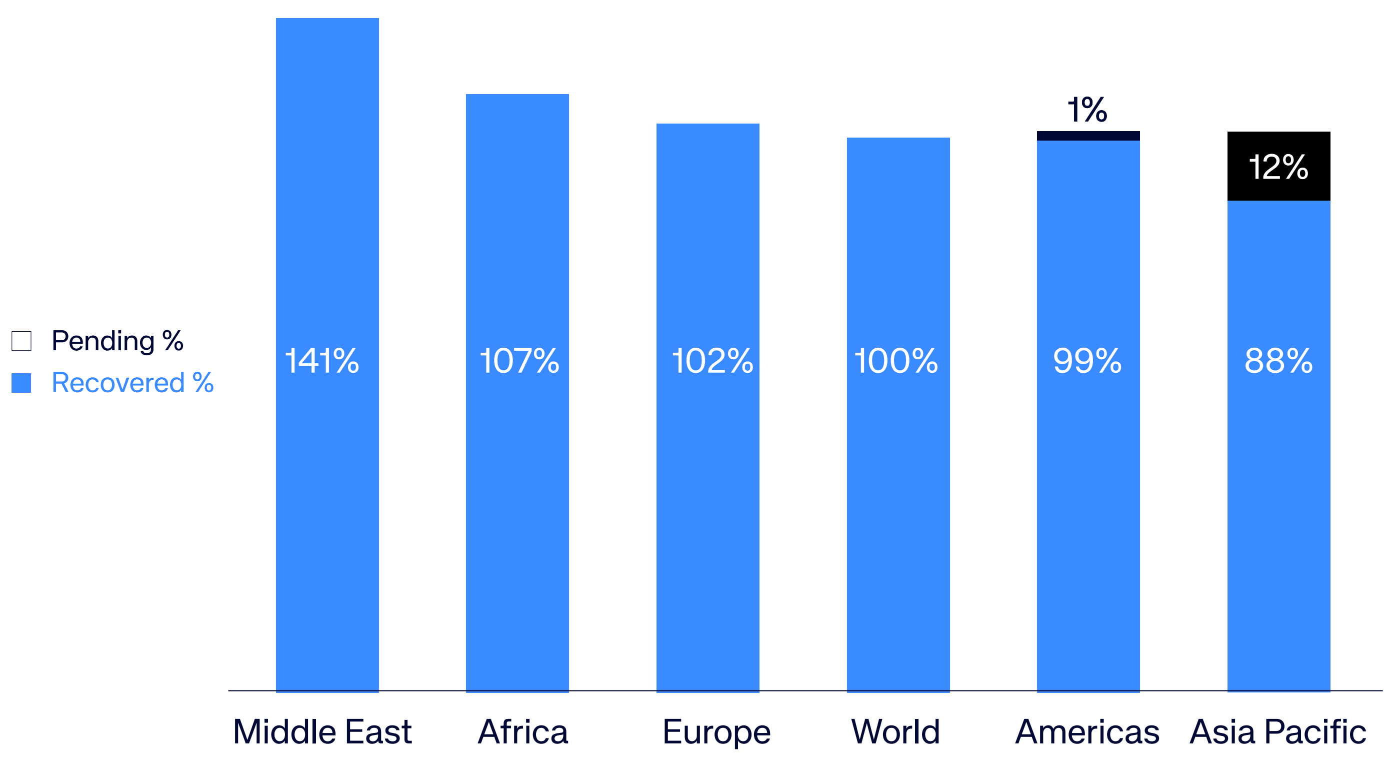
Zurab Pololikashvili
Secretary-General

UN Tourism

Global Market Indicators

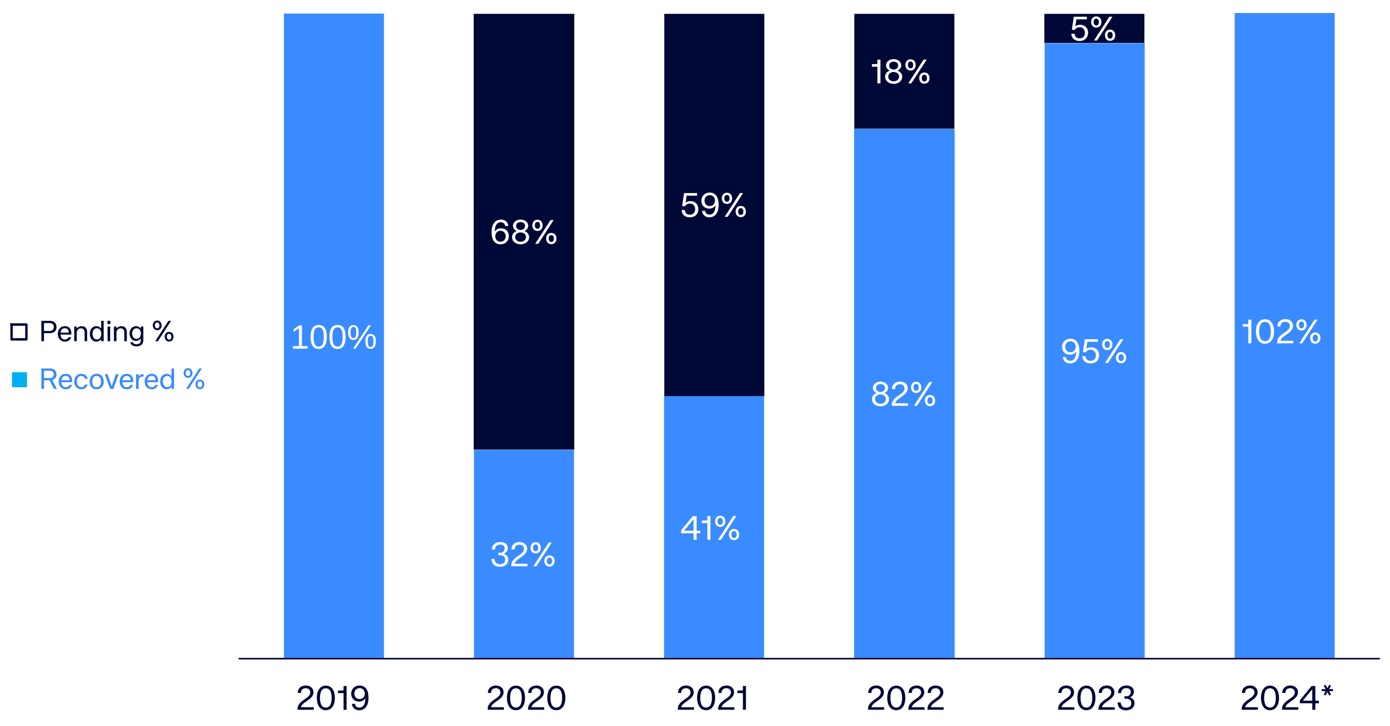
UN Tourism: key international tourism indicators

Recovery of international tourist arrivals by world region in 2024* (% of 2019 levels)



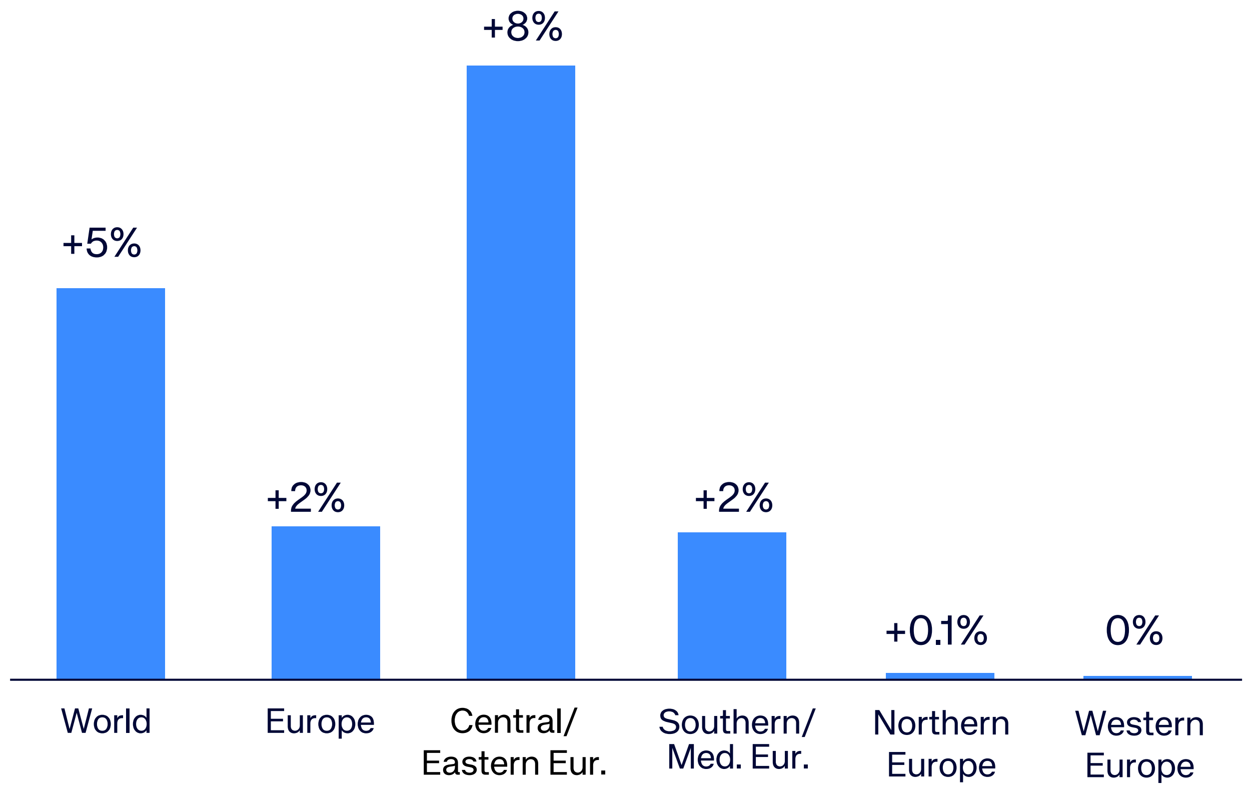
Source: World Tourism Organization (UN Tourism)
Date as of May 2025
*Provisional data.

Recovery of international tourist arrivals in Europe (% of 2019 levels)



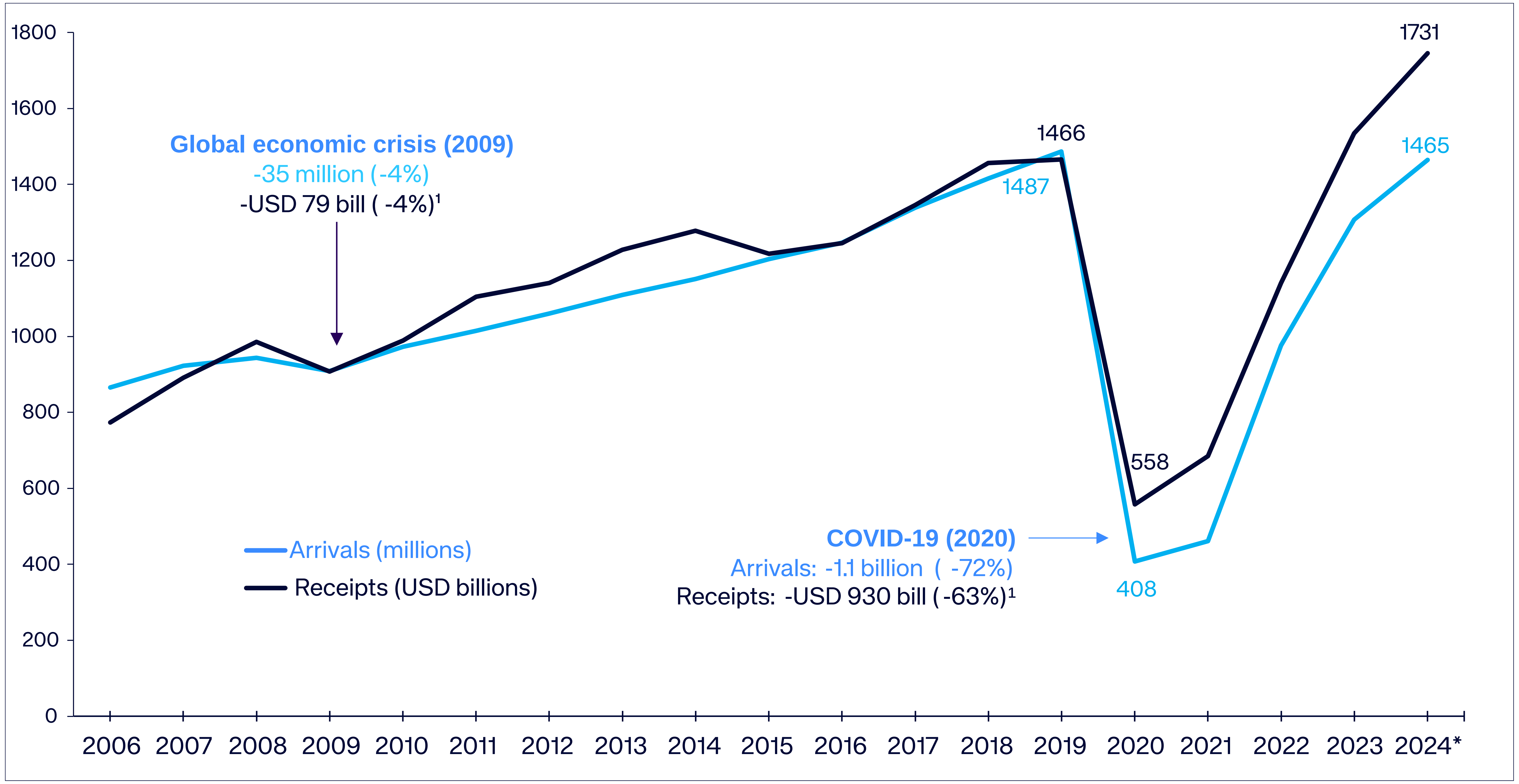
Source: World Tourism Organization (UN Tourism)
Date as of May 2025
*Data for 2024 are provisional.

International tourist arrivals in Europe, Q1 2025* (% change over 2024)



Source: World Tourism Organization (UN Tourism)
Date as of May 2025
*Data are provisional.

International tourist arrivals and tourism receipts, 2006-2024*



Source: World Tourism Organization (UN Tourism)
Date as of May 2025
*Data for 2024 are provisional estimates

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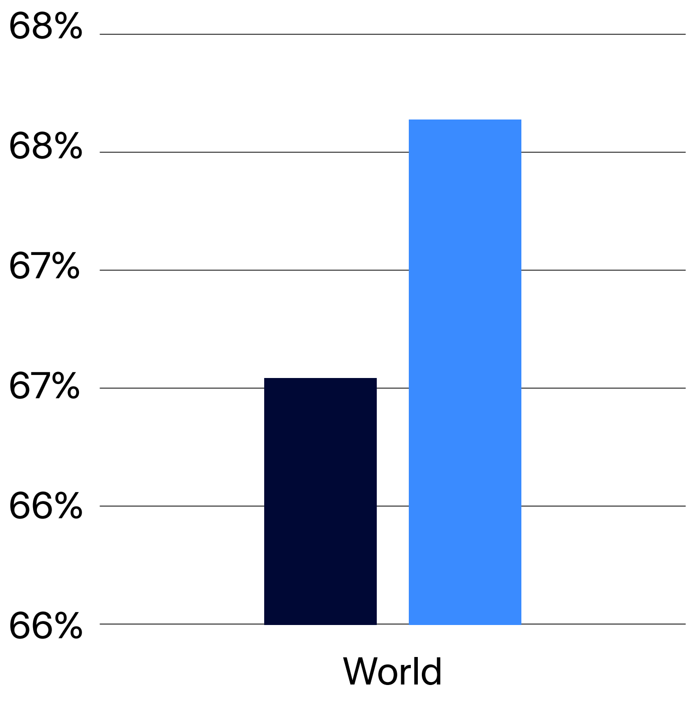
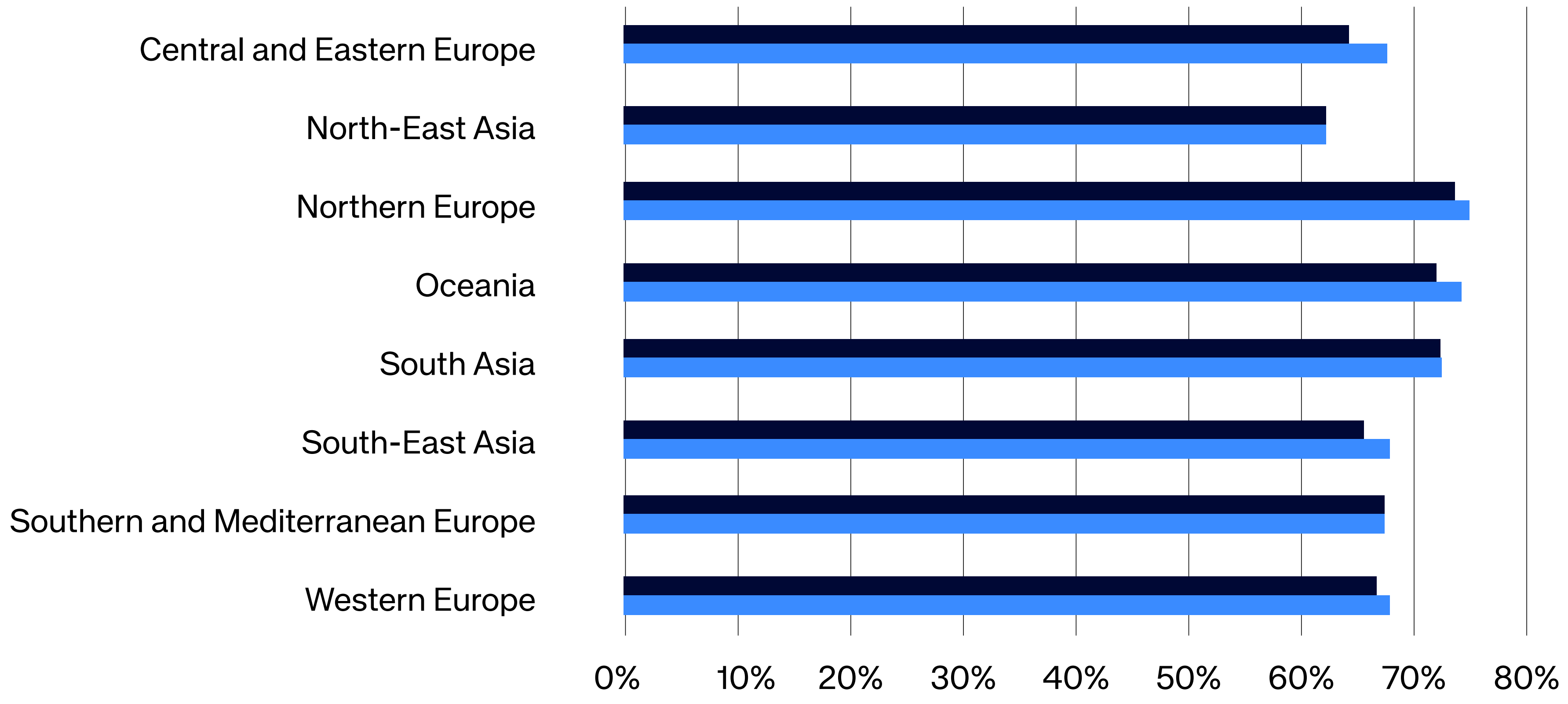
Hospitality market indicators

Occupancy by year

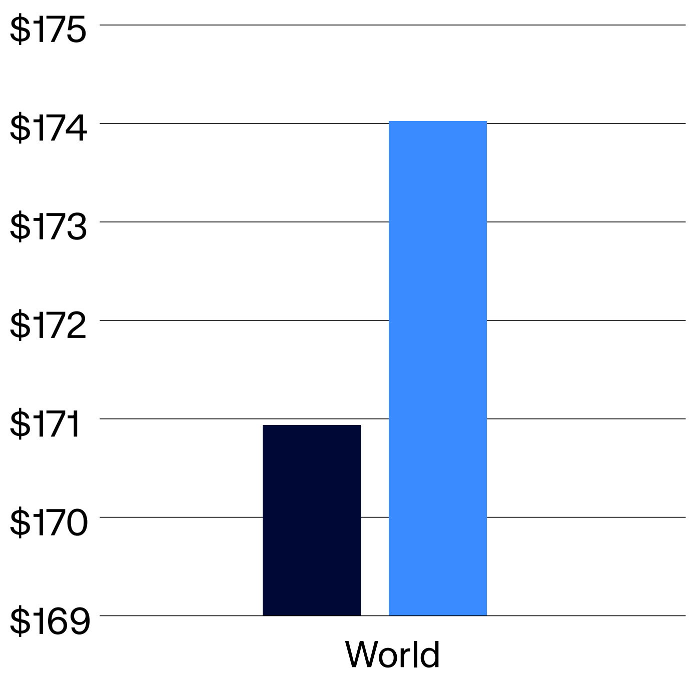
(Average over the last 12 months)

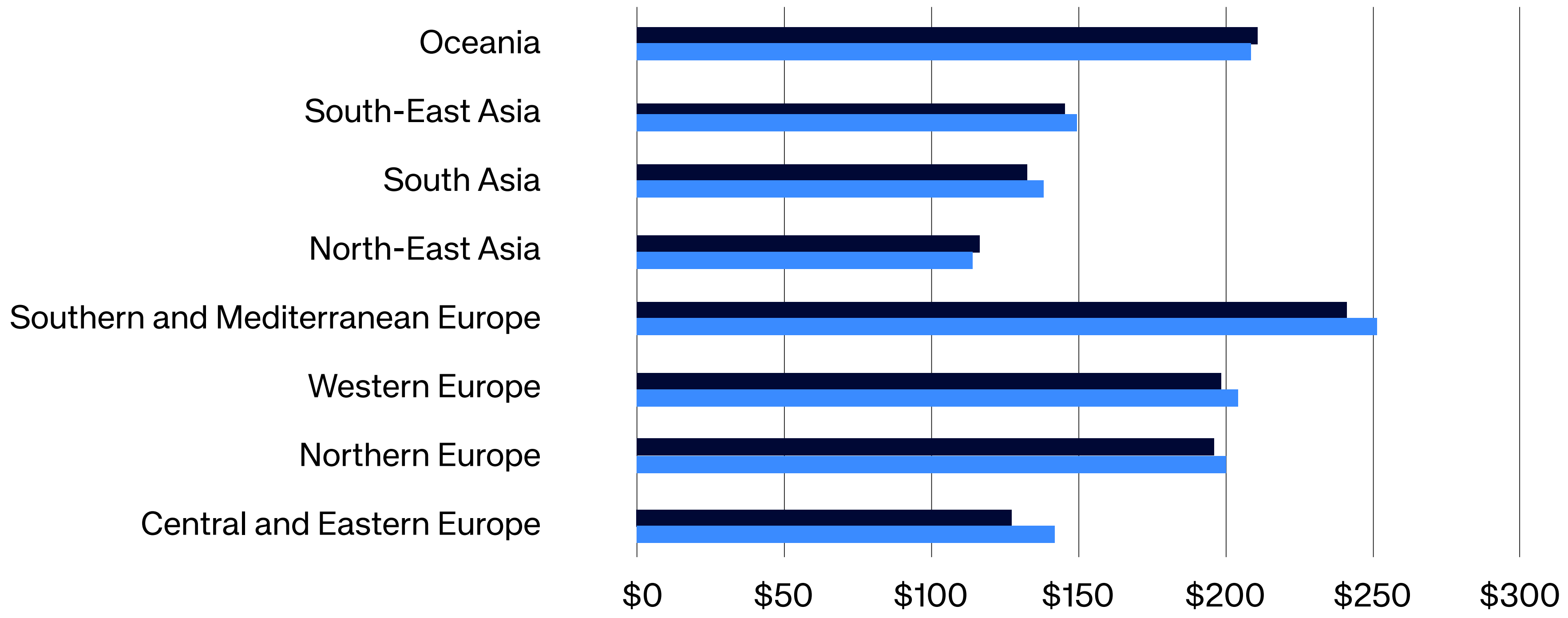




Average Daily Rate ("ADR") evolution by year in USD

(Average over the last 12 months)





■ May 2023 - April 2024 ■ May 2024 - April 2025

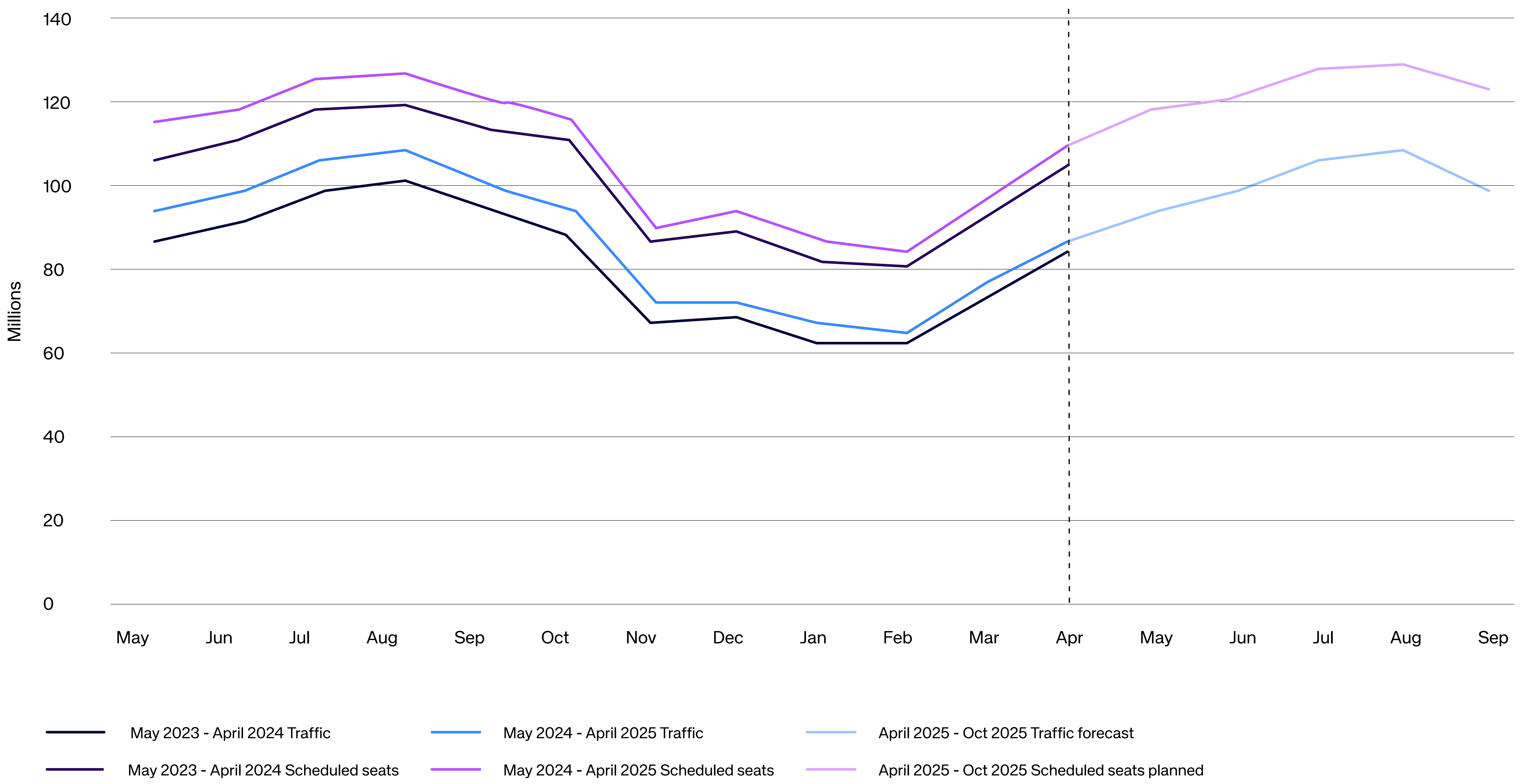
Source: Navigator360™ as of Monday, 5 May 2025

Europe

Air travel overview

Worldwide to Europe

Air passenger volume and scheduled seats



Source: Navigator360™ as of Monday, 5 May 2025

6.7% growth

Passenger traffic and capacity analysis

Positive year-on-year trend recovery:
Passenger traffic to Europe shows a positive trend, with a 6.7% year-on-year growth projected for the April-October 2025 period, signaling a positive trend and renewed traveller interest across global markets.

Seasonal demand remains consistent:
Both traffic and capacity follow a familiar seasonal pattern, peaking in July and August, reflecting strong summer travel demand.

Capacity leads traffic:
For most of the timeline, scheduled seats (capacity) are consistently higher than actual passenger traffic, especially for the upcoming April-September 2025 period. This indicates that airlines are planning ahead of demand, perhaps anticipating continued growth or attempting to stimulate it.

Recommendation for DMOs:
It may be worth considering initiatives that support year-round tourism development, particularly in the shoulder and off-peak seasons, to help better align with available airline capacity and smooth demand throughout the year.

Where do visitors come from? Reality vs. aspirations

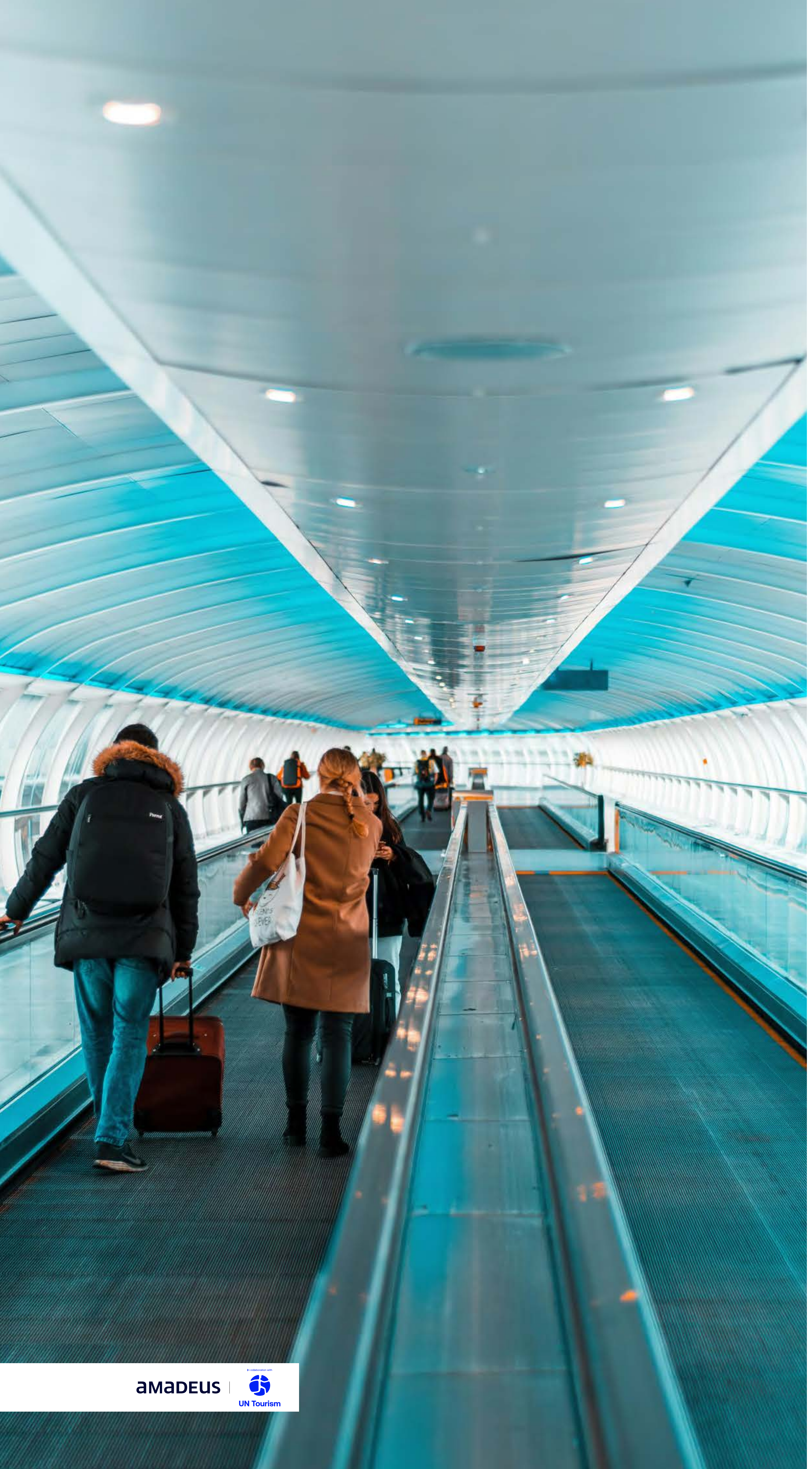
Top origin markets searching for Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
United States	1	1
United Kingdom	2	2
Germany	3	3
Italy	5	4
Spain	4	5
France	6	6
China	23	7
Türkiye	8	8
Poland	12	9
Brazil	9	10

Top origin markets travelling to Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
United States	1	1
Spain	2	2
Germany	3	3
Italy	4	4
France	5	5
Kazakhstan	7	6
United Kingdom	6	7
Norway	8	8
India	9	9
Portugal	11	10

Source: Navigator360™ as of Monday, 5 May 2025



Are travellers from these markets to Europe already on your radar?

Top origin markets searching for Europe
with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
China	1	196%
Japan	2	44%
Norway	3	26%
India	4	25%
Poland	5	25%
Korea (ROK)	6	23%
Germany	7	16%
Switzerland	8	16%
Italy	9	13%
Denmark	10	12%

Top origin markets travelling to Europe
with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Japan	1	20%
Egypt	2	7%
Denmark	3	5%
Kazakhstan	4	5%
Saudi Arabia	5	4%
Italy	6	2%
Korea (ROK)	7	2%
Portugal	8	1%
Norway	9	1%
Spain	10	0%

Source: Navigator360™ as of Monday, 5 May 2025

Who is searching and visiting Europe analysis

Gap between travel interest and actual bookings:
Some markets, like India and Norway, appear among the top 10 both in searches and actual bookings, while others (e.g. Korea (ROK)) show high search interest but only moderate booking growth. This suggests varied levels of travel conversion across regions.

Emerging markets are gaining traction:
Japan stands out for showing growth in both interest and bookings. These could represent a market that is gaining momentum and may become more strategic in the near term.

Established markets show strong signals:
Traditional leaders like the United States, United Kingdom, and Germany continue to generate strong inbound volumes.

Recommendation for DMOs:
There may be value in diversifying source market strategies by complementing core markets with emerging ones-especially where search interest is growing-offering a potential path to more resilient and distributed visitor flows.

Where do people from Europe travel to? Reality vs. aspirations

Top searched destinations in Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Spain	1	1
United Kingdom	2	2
Italy	3	3
France	4	4
Germany	5	5
Greece	6	6
Portugal	7	7
Netherlands	8	8
Poland	9	9
Switzerland	10	10

Top booked destinations in Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Spain	1	1
United Kingdom	2	2
Italy	3	3
France	4	4
Germany	5	5
Türkiye	6	6
Portugal	7	7
Kazakhstan	8	8
Norway	9	9
Greece	10	10

Source: Navigator360™ as of Monday, 5 May 2025

Top performing destinations in Europe

Top searched destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Norway	1	39%
Finland	2	36%
Georgia	3	33%
Albania	4	30%
Sweden	5	25%
Denmark	6	24%
Hungary	7	24%
Malta	8	21%
Poland	9	20%
Czech Republic	10	19%

Top booked destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Azerbaijan	1	26%
Kazakhstan	2	7%
Czech Republic	3	6%
Uzbekistan	4	4%
Norway	5	4%
Croatia	6	3%
Hungary	7	3%
Greece	8	1%
Italy	9	1%

Source: Navigator360™ as of Monday, 5 May 2025

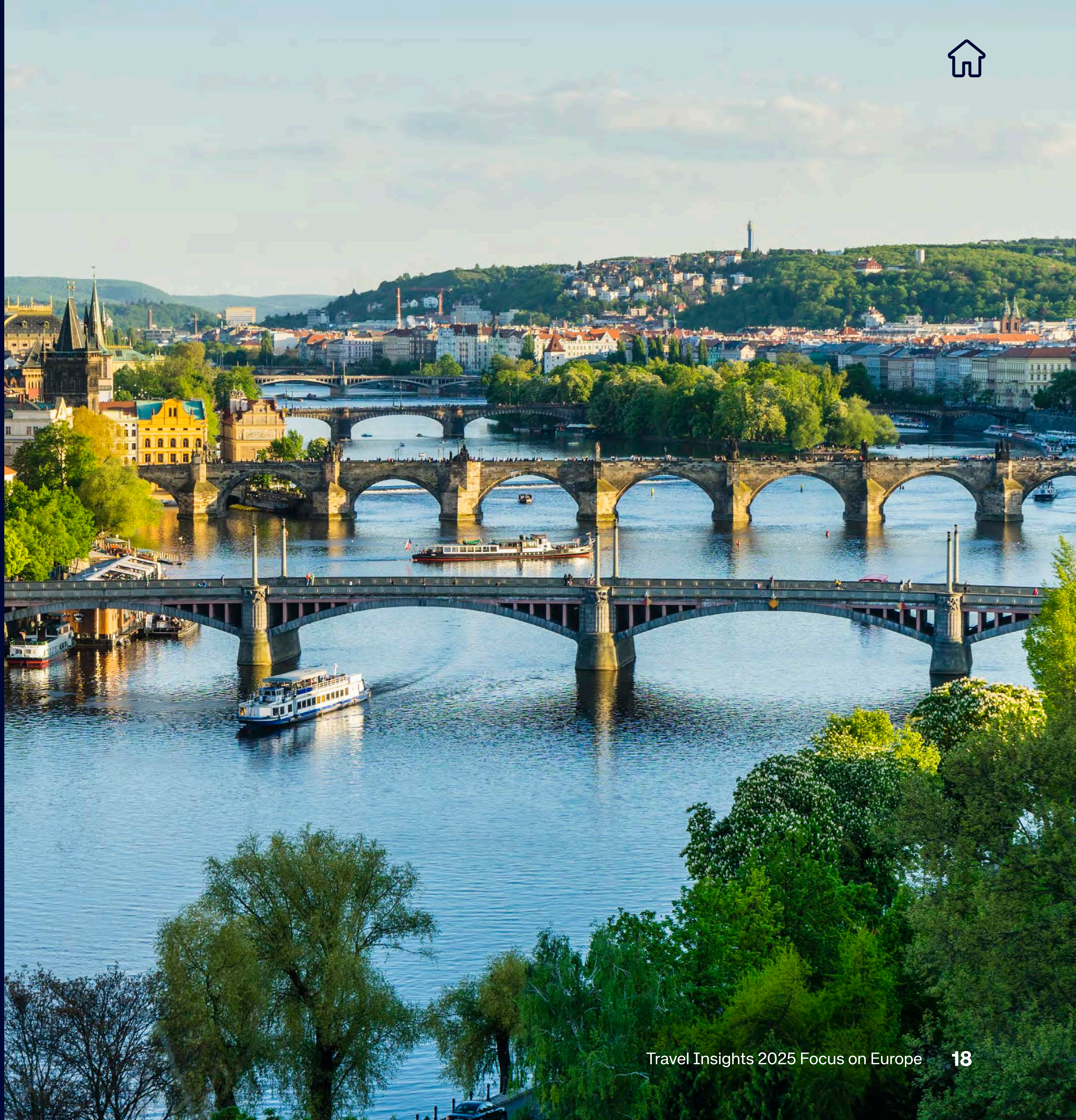
Preferred destinations in Europe

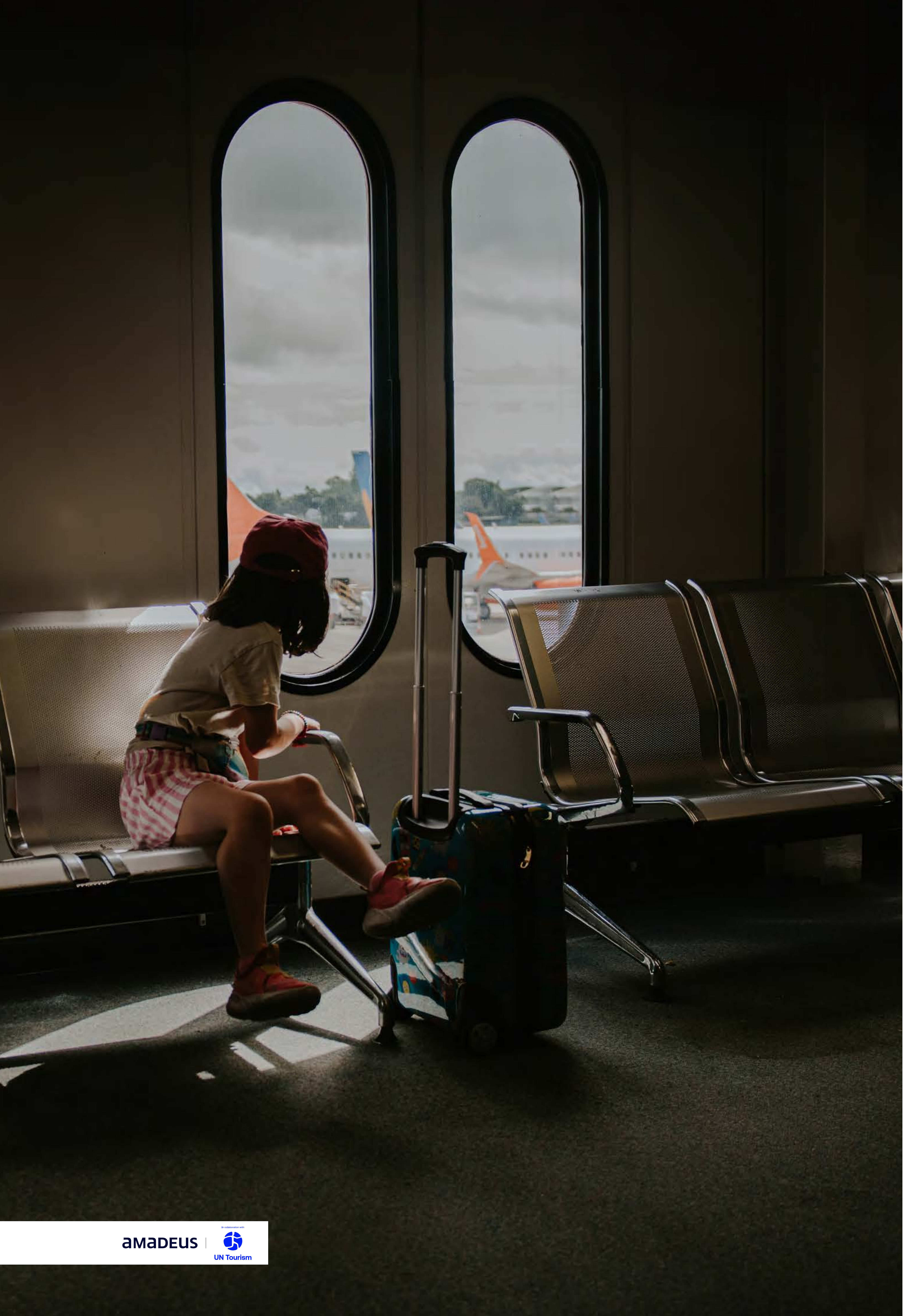
Classic destinations dominate, but growth is shifting elsewhere:
Spain, the United Kingdom, and Italy continue to lead both in searches and bookings, maintaining stability in Europe's top travel spots. However, the most dynamic growth is happening outside these traditional leaders, with destinations like Norway, Georgia, and Finland seeing the sharpest increases in travel interest.

Disconnect between interest and conversion in emerging destinations:
Countries such as Norway and Georgia rank high in search growth, but their booking growth is more moderate. This gap could suggest barriers such as price sensitivity, limited connectivity, or perceived accessibility.

Eastern and Non-Schengen Europe gains visibility:
Growth in bookings is particularly notable in destinations like Azerrbaijan, Kazakhstan, which, while outside the usual core of Western Europe travel, are becoming more attractive. This could reflect a diversification in traveller preferences or targeted regional marketing.

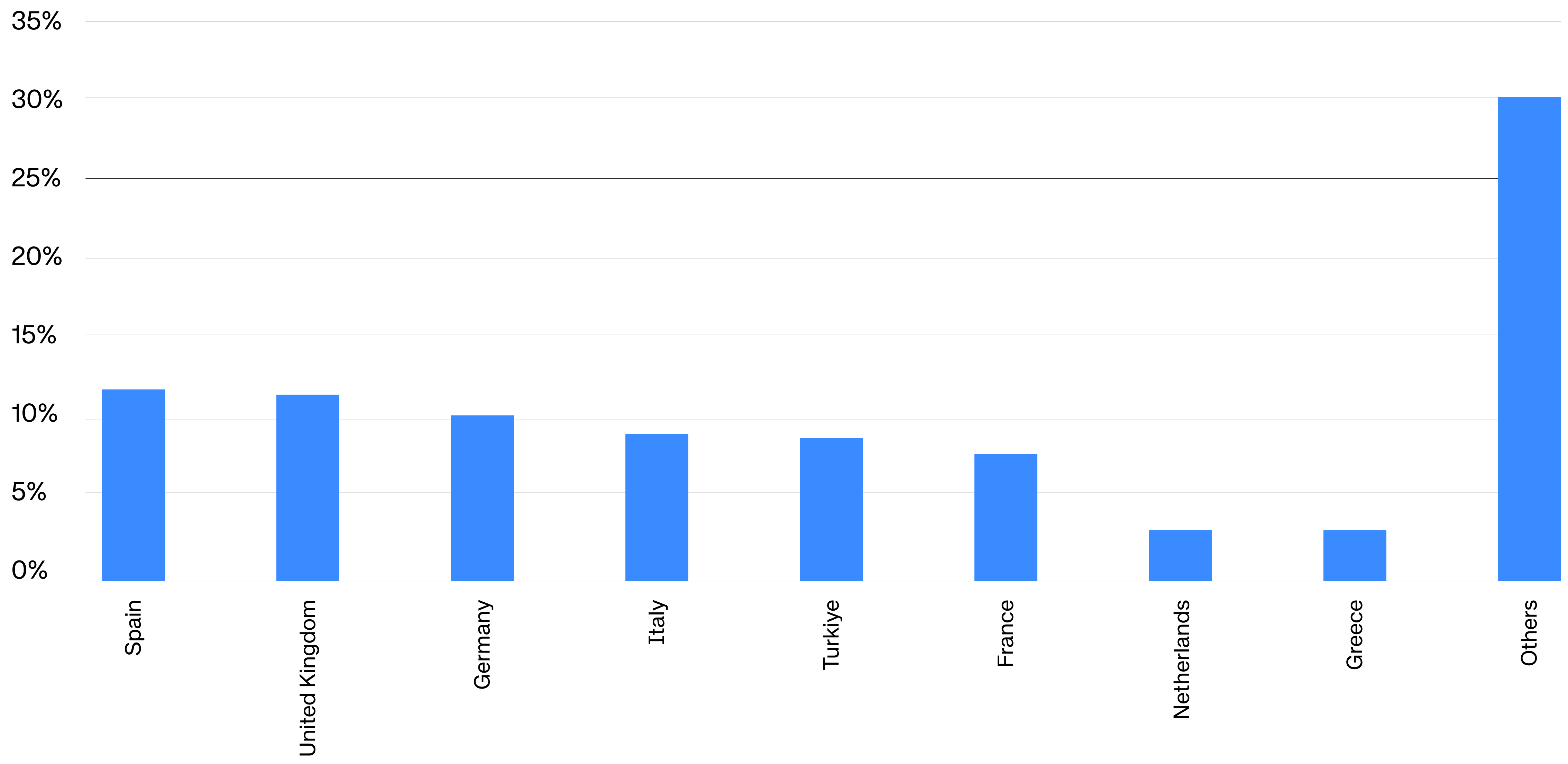
Recommendation for DMOs:
There may be value in exploring how rising interest in lesser-known or emerging destinations can be supported through accessibility, storytelling, or regional collaboration-helping turn growing curiosity into confirmed visits.





Share of available seats in flights to Europe, by market

Share of available seats by market in May 2024 - April 2025 schedules (%)



YoY* capacity growth by sub region

UN Tourism sub region	YoY growth
Central and Eastern Europe	7%
Southern and Mediterranean Europe	7%
Western Europe	4%
Northern Europe	3%

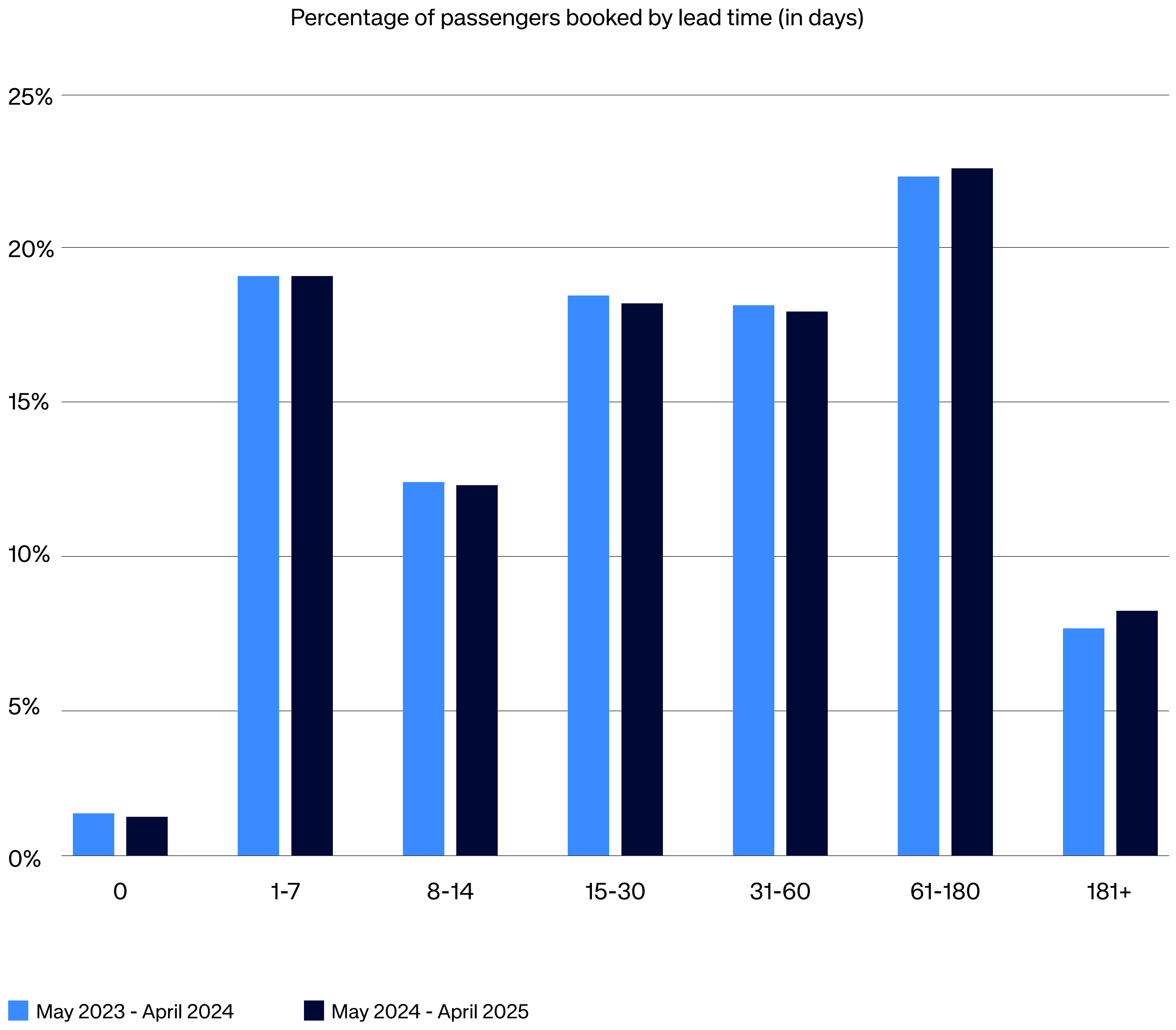
Capacity remains concentrated in a few markets:
Spain and the United Kingdom together account for a significant share of scheduled air capacity to Europe for May 2024-April 2025, highlighting their continued dominance as European gateways.

Central/Eastern/Southern and Mediterranean Europe are driving growth:
These European areas are experiencing the highest year-on-year growth (+12%), indicating a strategic expansion inconnectivity to these regions.

* May 2024 - April 2025 vs May 2023 - April 2024

Source: Navigator360™ as of Sunday, 11 May 2025

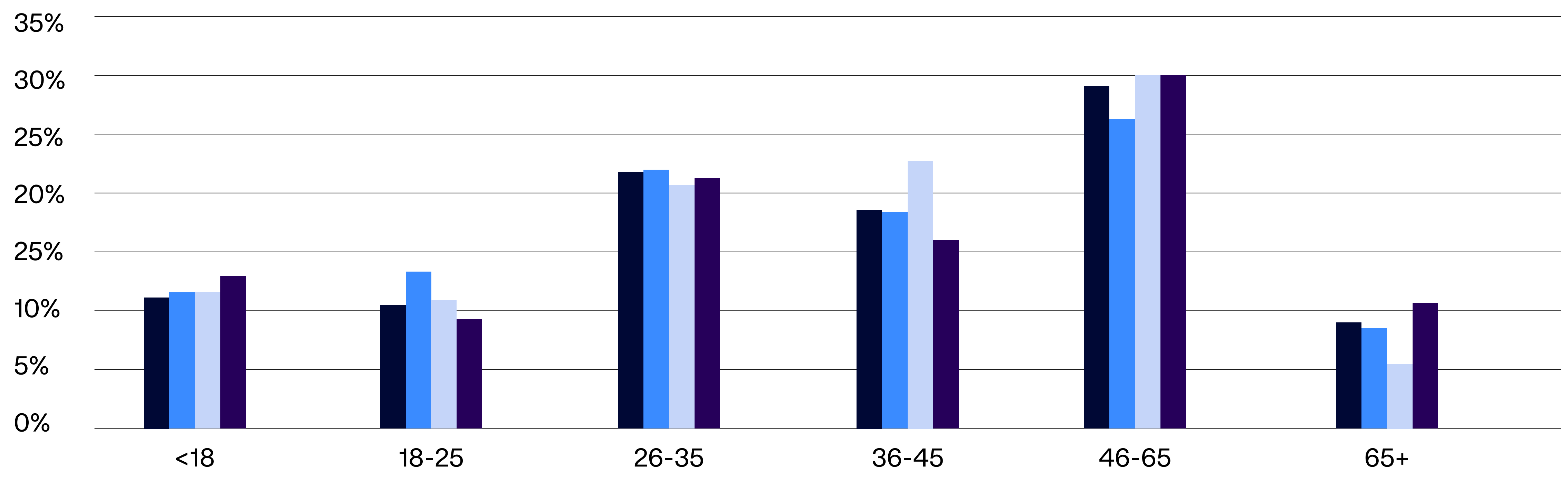
Air travel bookings to Europe by lead time



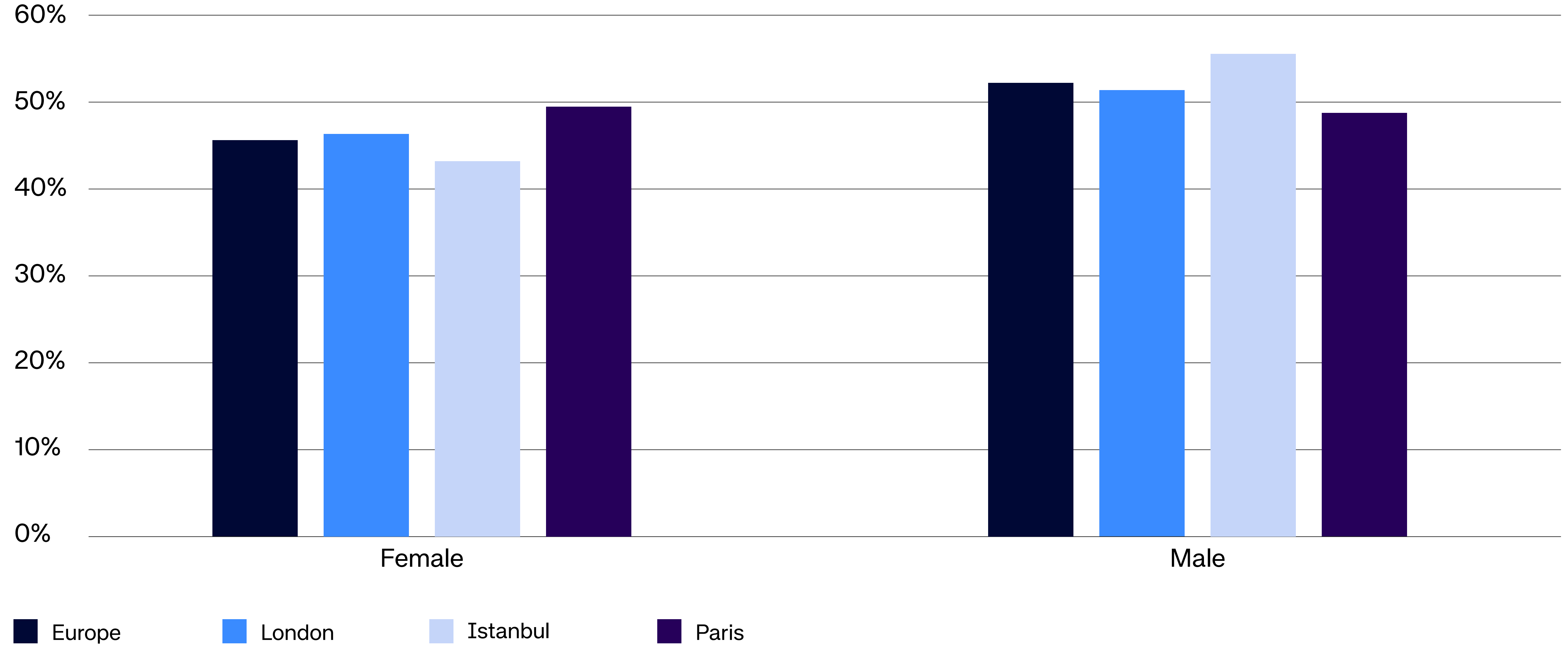
Source: Navigator360™ as of Monday, 5 May 2025

What type of travellers travel to Europe: top destinations

Percentage of passengers booked by age category



Percentage of passengers booked by gender



Source: Navigator360™ as of as of Sunday, 11 May 2025

Lead time and profile analysis

Longer lead times dominate travel planning:
Most passengers are booking their travel to Europe well in advance-over 40% book more than 60 days ahead, with little year-on-year change. This trend indicates continued traveller confidence and structured planning, especially for long-haul or high-investment trips.

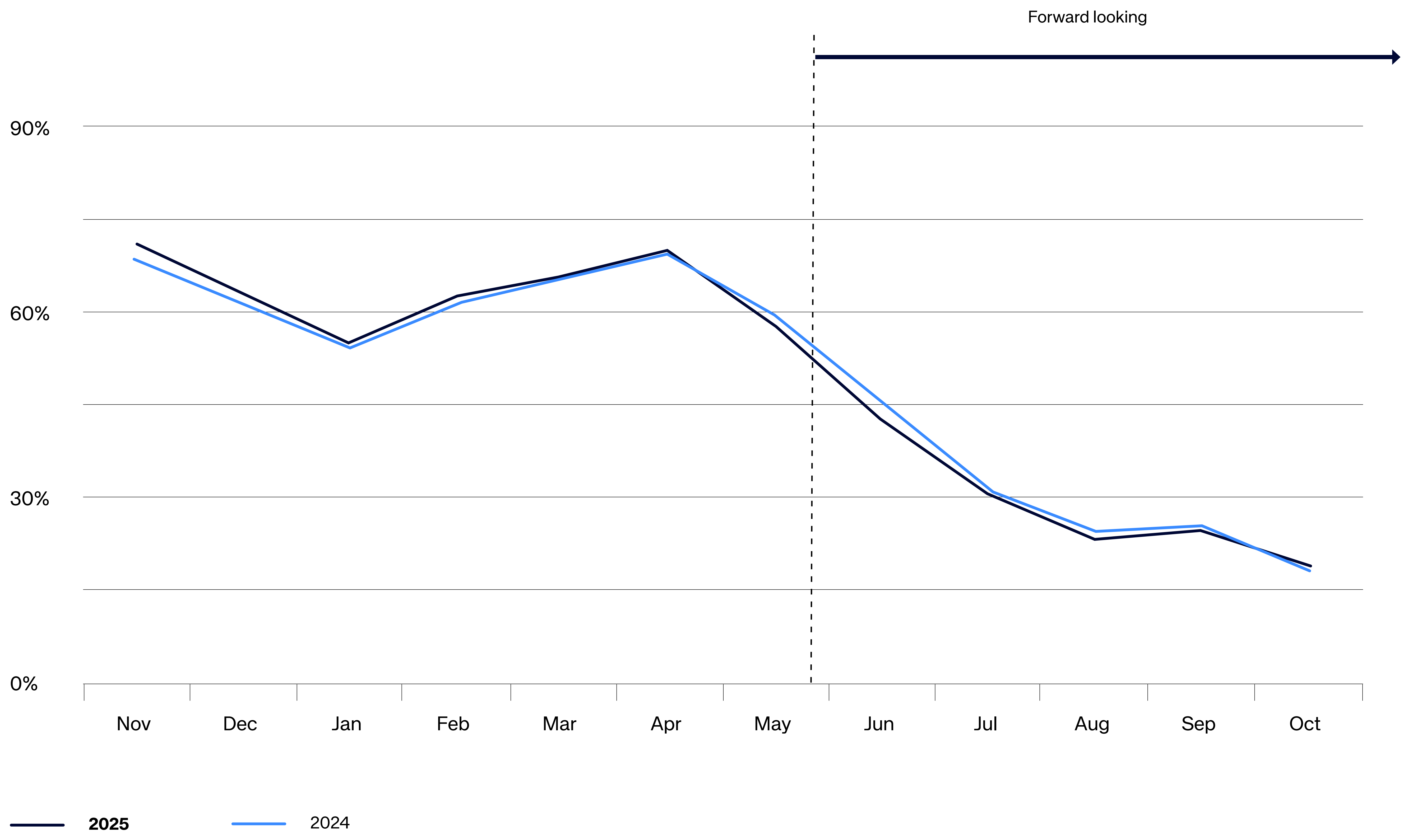
Older age groups are the largest travel segment:
Travellers aged 46-65 years represent the largest share across all major European destinations, followed by the 36-45 and 26-35 brackets. This highlights a demographic with both disposable income and flexibility, often associated with cultural or leisure travel.

Recommendation for DMOs:
It could be helpful to tailor seasonal campaigns to align with the longer lead times typical of Europe-bound travellers-especially those in older age brackets-ensuring travel inspiration and planning tools are available early and targeted toward their preferences.

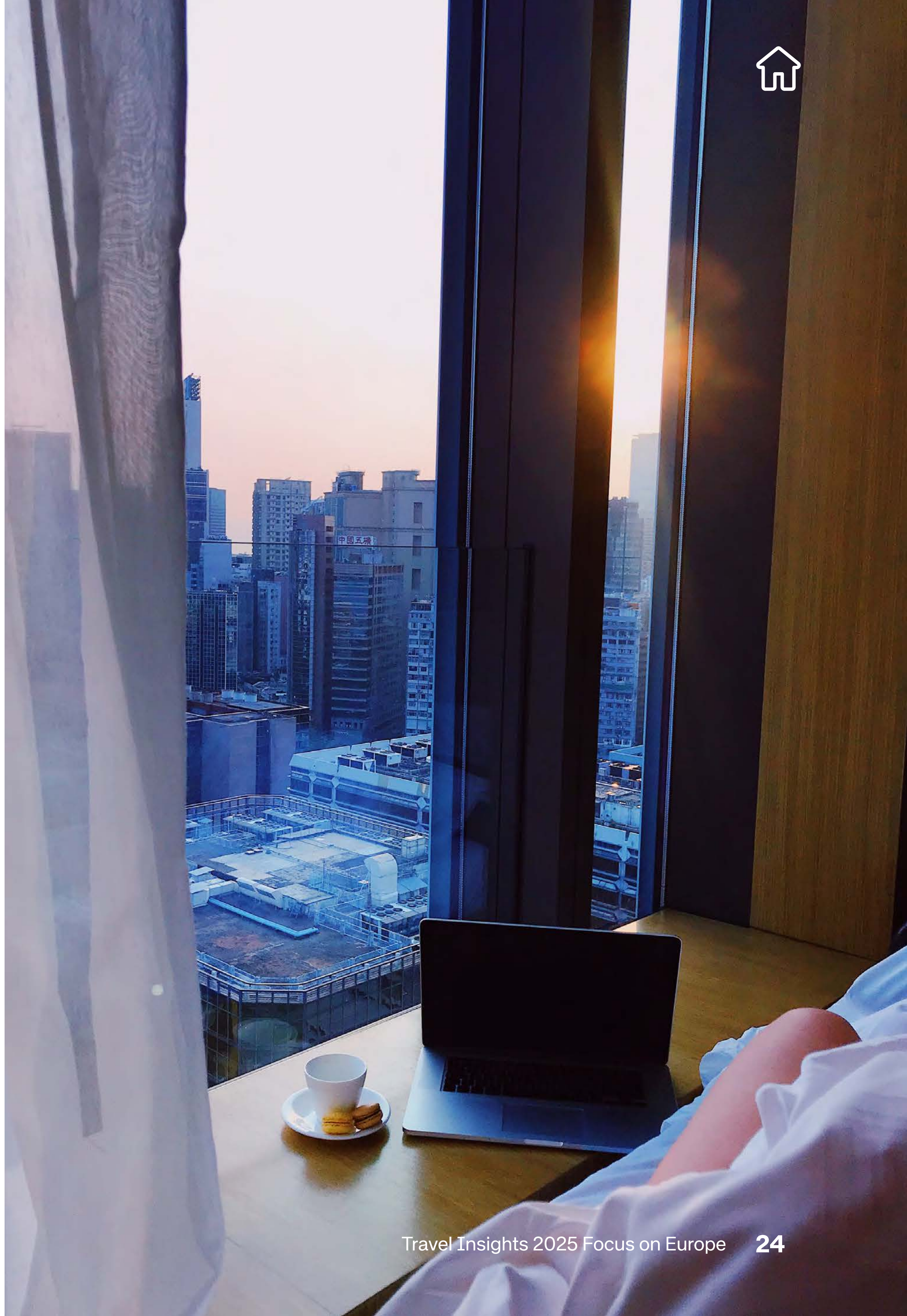
Hospitality occupancy overview

Hotel occupancy in Europe

On-the-books by month compared to same month last year (%)

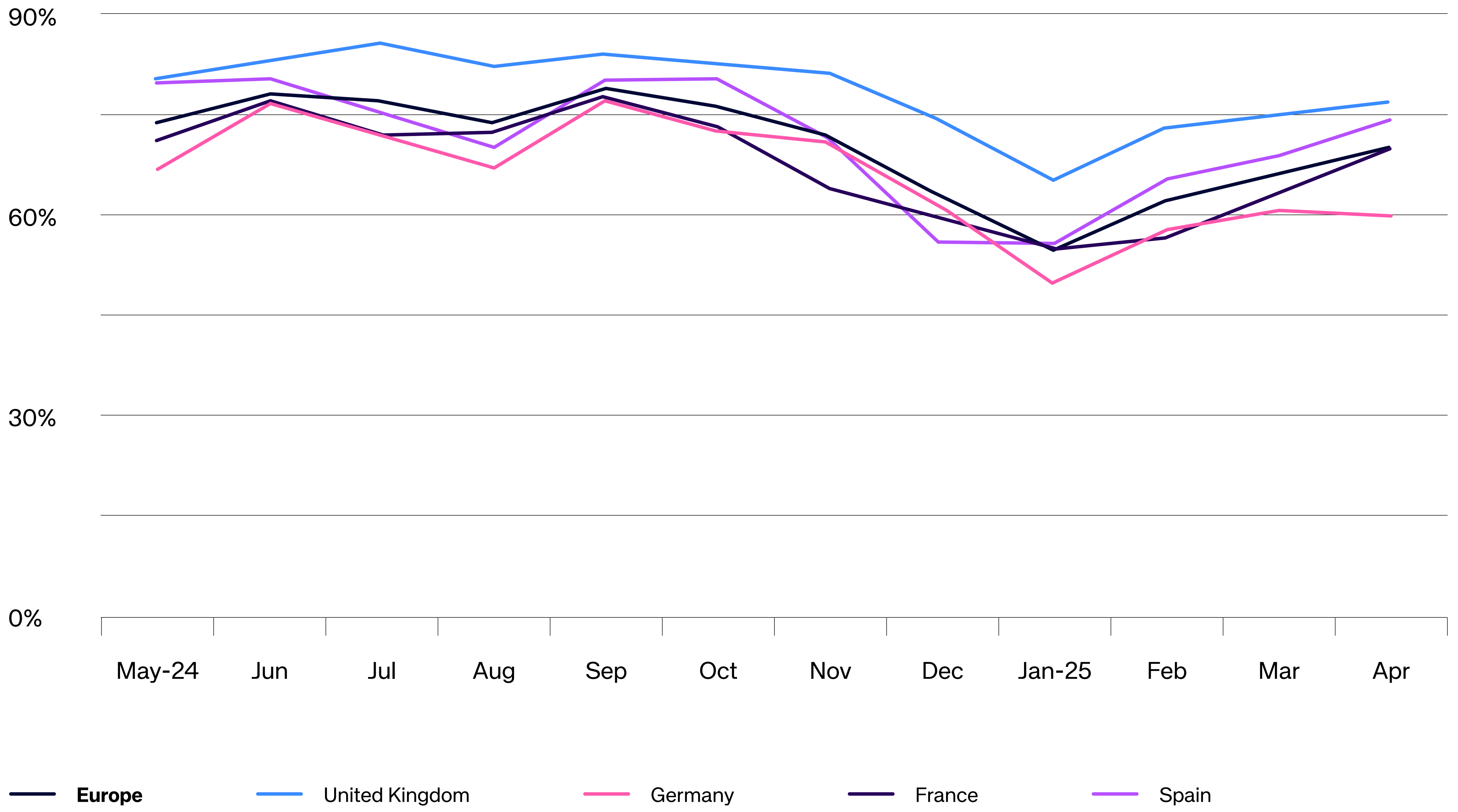


Source: Navigator360™ as of Monday, 5 May 2025



Hotel occupancy for the past 12 months

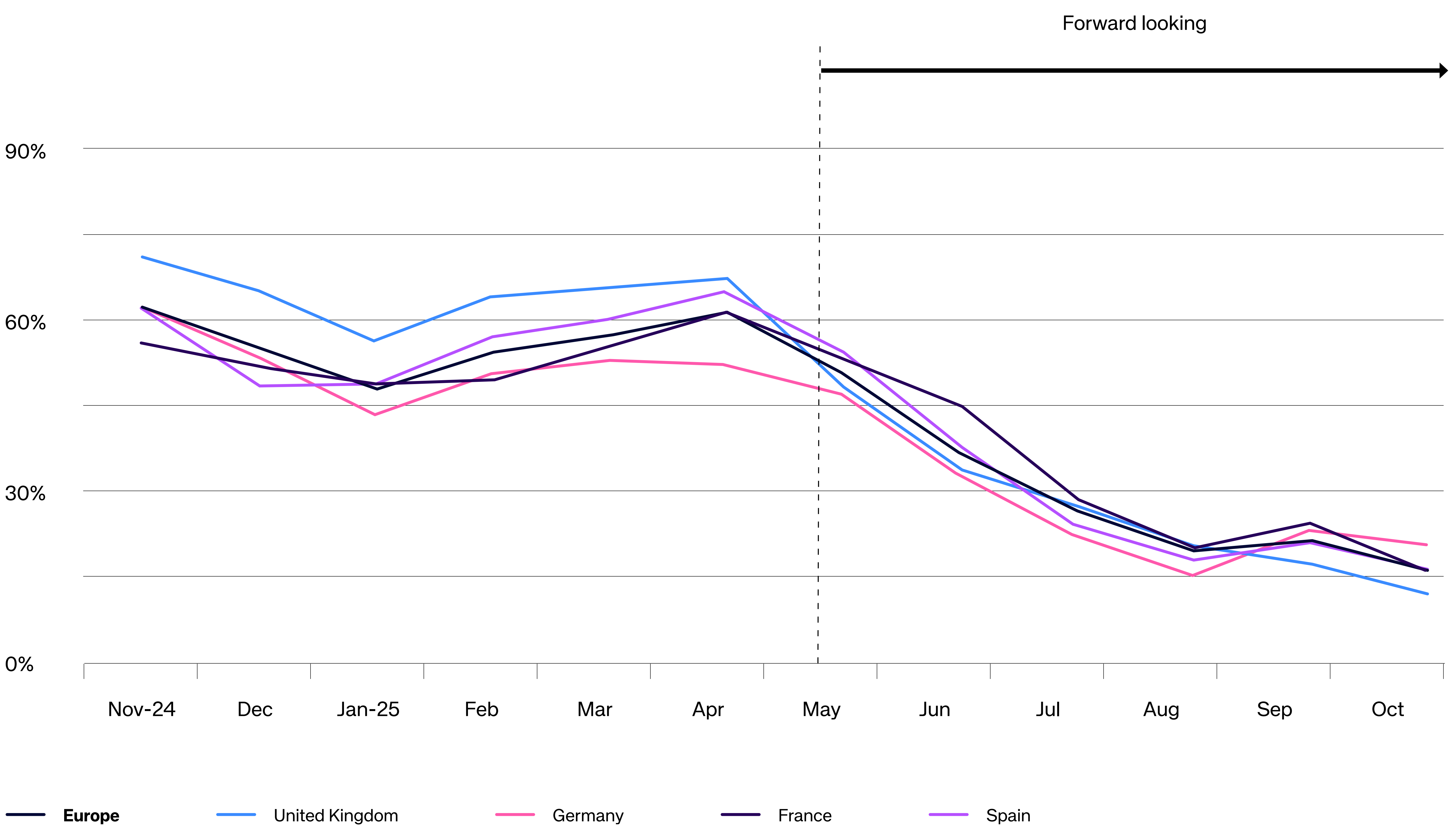
For Europe and its Top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy on-the-books

For Europe and its top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy analysis

Forward-looking occupancy reflects normal booking behaviour:
While current forward-looking data from May-October 2025 shows lower occupancy levels, this aligns with typical shorter booking lead times observed among many travellers. Looking at past trends suggests that bookings are likely to build up progressively closer to travel dates.

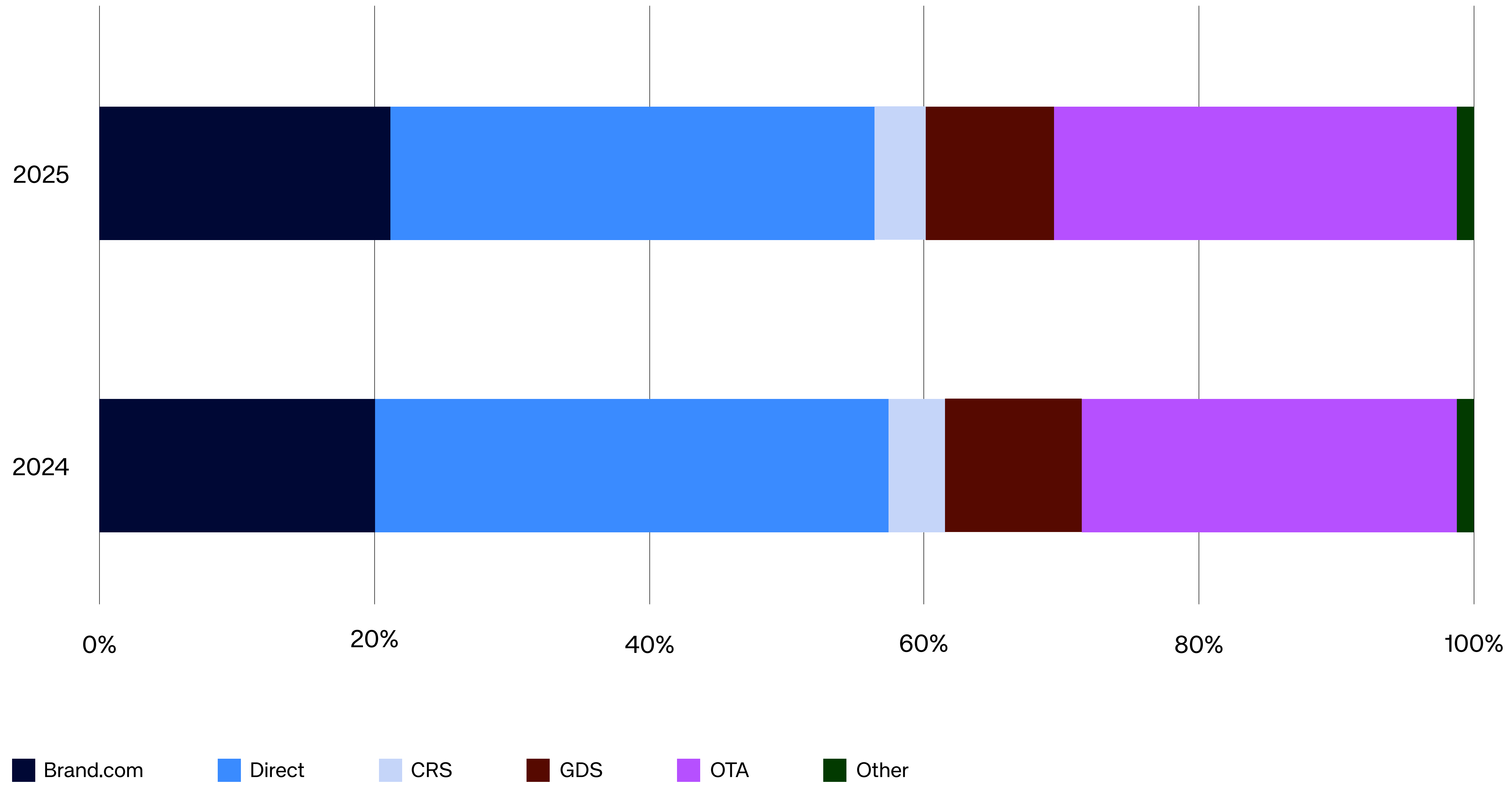
Seasonality continues to shape demand patterns:
Both historical and upcoming data confirm clear seasonal rhythms, with peak occupancy in spring and early summer, followed by a decline into autumn. This pattern remains stable across major European markets, supporting consistent planning cycles for the industry.

United Kingdom shows stable hotel demand:
The United Kingdom has maintained relatively higher occupancy over the past 12 months, especially during winter and early spring. This may point to a stronger domestic base or year-round visitor appeal compared to more seasonal destinations.

Recommendation for DMOs:
There could be value in continuing to monitor short-term booking trends closely and aligning promotional efforts with typical lead times-helping to convert late planners and maintain momentum through the post-summer months.

Hotel channel mix in Europe

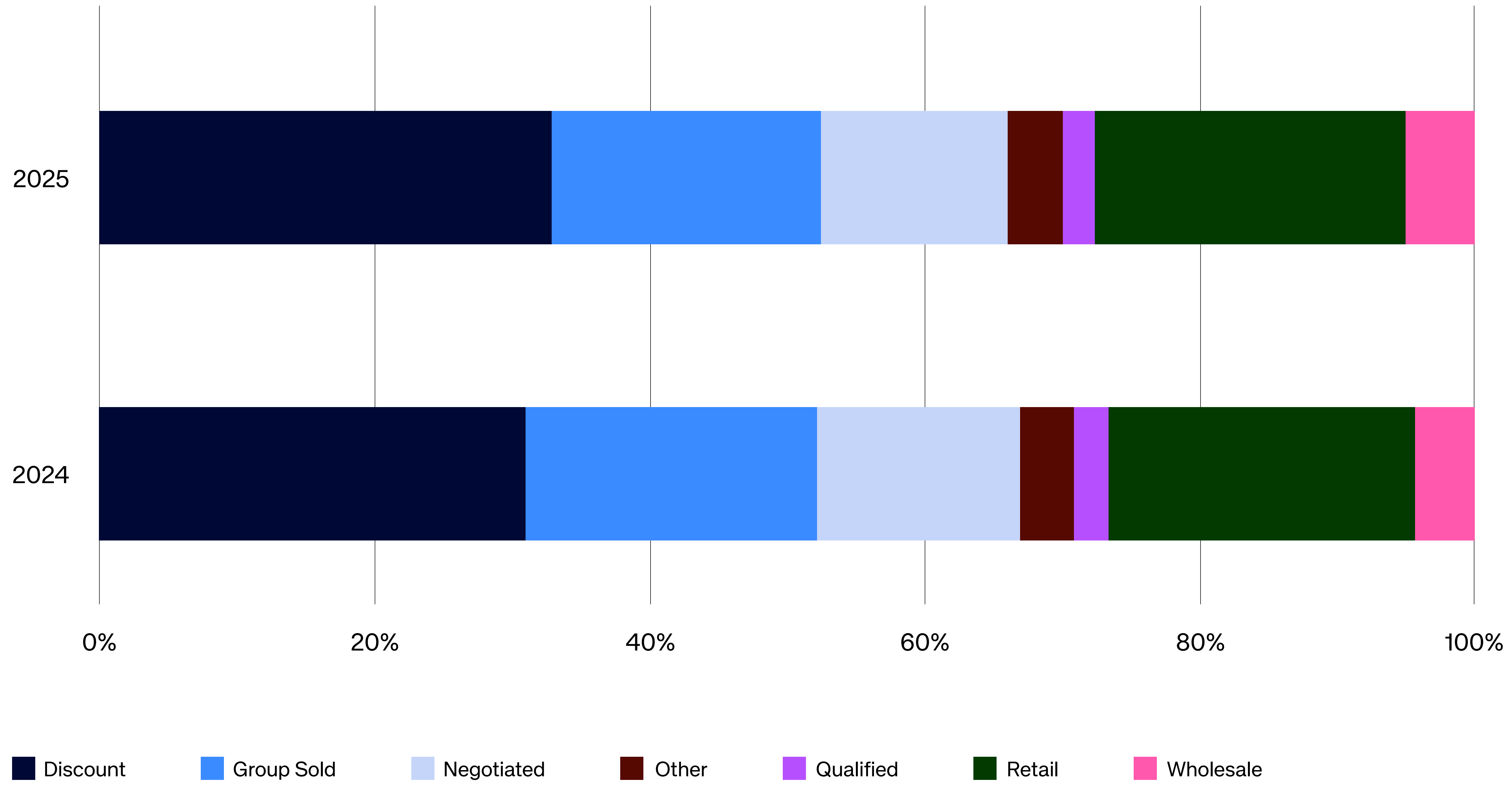
On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Sunday, 11 May 2025

Hotel segmentation in Europe

On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Sunday, 11 May 2025

Hotel mix and segmentation analysis

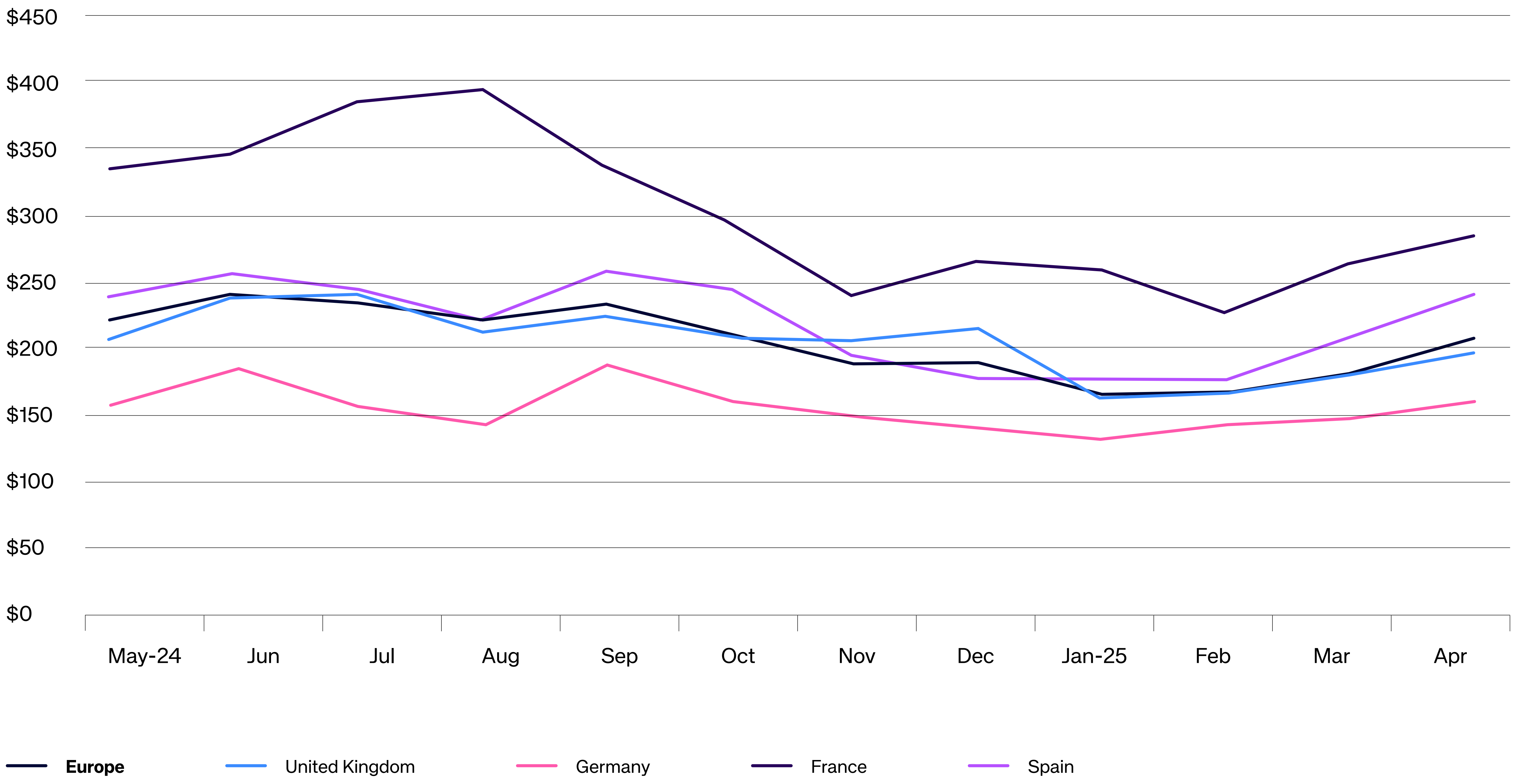
OTA channels continue to strengthen:
The proportion of bookings coming through Online Travel Agencies (OTAs) has increased year over year, reinforcing the influence of digital platforms in hotel distribution. This trend may reflect changing traveller habits or greater OTA marketing reach.

Slight uptick in brand.com bookings:
Despite the OTA growth, there is also a modest increase in brand.com bookings, indicating that brand loyalty and owned channels are continuing to hold relevance, particularly among returning or value-conscious travellers.

Discount and negotiated segments dominate hotel bookings:
Discounted rates and negotiated segments make up a substantial portion of the mix for May 2025, showing ongoing demand for value-driven offers, especially during early booking windows. The retail segment and wholesale appears to be growing year over year.

Recommendation for DMOs:
It might be useful to explore collaborative campaigns with both OTAs and direct hotel channels, aligning promotional strategies with traveller preferences while also supporting partners across different distribution models.

Average daily rate (ADR) in USD



Source: Navigator360™ as of Monday, 5 May 2025

Hotel ADR in Europe analysis

United Kingdom maintains premium positioning:
The United Kingdom consistently shows the highest ADR throughout the year, peaking close to $400 in August, suggesting a strong positioning as a high-value market, likely driven by demand in key urban centers and the strength of the British pound.

Clear seasonal rate trends across markets:
ADR peaks during the summer months (June-August) across all countries, then drops through the winter, before slowly rising again in early spring. This reflects well-established seasonality and price elasticity tied to travel demand.

Germany remains a more affordable option:
Germany consistently shows the lowest ADR, staying below $200 throughout the year.
This may reflect broader affordability or competitive pricing in the market, which could appeal to cost-sensitive segments.

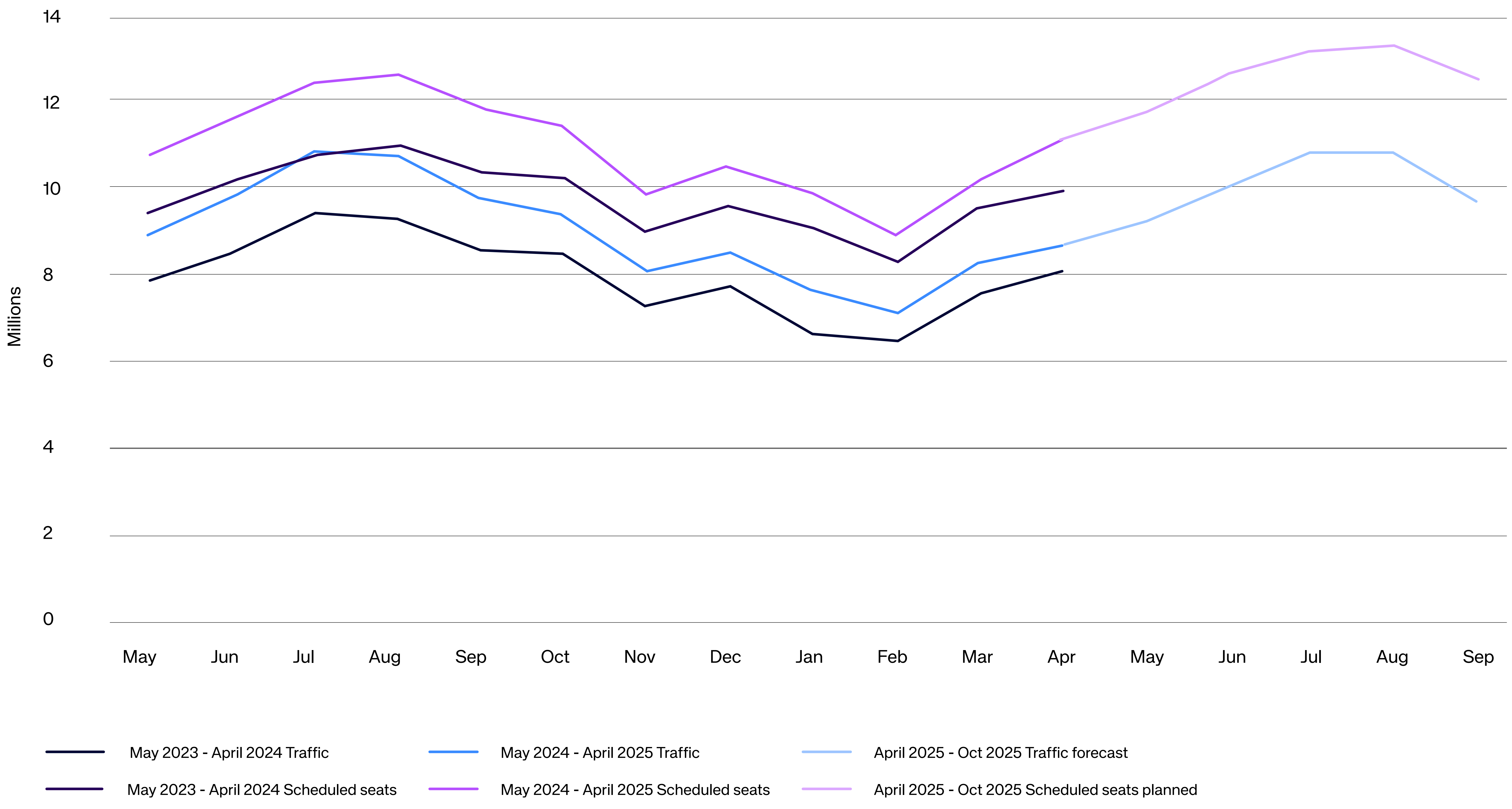
Recommendation for DMOs:
There may be opportunities to highlight pricing dynamics as part of destination messaging- emphasising premium experiences in high-ADR markets or value-for-money positioning in more affordable destinations, depending on target audiences and seasonal windows.

Europe - Central and Eastern Europe

Air travel overview

Worldwide to Central and Eastern Europe

Air passenger volume and scheduled seats



Source: Navigator360™ as of Monday, 5 May 2025

12.2% growth

Passenger traffic and capacity analysis

Robust growth ahead:
A 12.2% year-on-year increase in passenger traffic to Central and Eastern Europe is projected for the April-October 2025 period-well above the European average-highlighting the region's growing appeal and expanding air connectivity.

Air capacity expanding faster than demand:
Scheduled seats are increasing at a slightly higher pace than actual traffic, especially in the summer months. This suggests that airlines are proactively investing in the region, potentially expecting rising future demand or seeking to stimulate it.

Seasonality follows broader European patterns:
Passenger volumes and capacity peak in the summer months (June-August), consistent with leisure-driven travel patterns. Notably, capacity and traffic appear more balanced during the shoulder seasons, indicating potential for extended-season tourism.

Recommendation for DMOs:
It may be worth building on the region's current momentum by promoting Central and Eastern Europe as a well-connected and increasingly sought-after destination-especially by capitalising on shoulder-season opportunities to spread demand more evenly.

Where do visitors come from? Reality vs. aspirations

Top origin markets searching for Central and Eastern Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
United Kingdom	1	1
Germany	2	2
China	13	3
Italy	4	4
United States	3	5
Spain	6	6
Türkiye	5	7
France	8	8
Kazakhstan	7	9

Top origin markets travelling to Central and Eastern Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking	May 24 - Apr 25 vs May 23 - Apr 24
Kazakhstan	1	1	7%
United States	3	2	-2%
Germany	4	3	0%
Türkiye	2	4	-18%
Israel	5	5	11%
France	6	6	6%
Romania	7	7	0%
United Kingdom	8	8	3%
Spain	10	9	10%

Source: Navigator360™ as of Monday, 5 May 2025

Are travellers from these markets to Central and Eastern Europe already on your radar?

Top origin markets searching for Central and Eastern Europe with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
China	1	263%
Saudi Arabia	2	68%
India	3	65%
Georgia	4	36%
Romania	5	34%
Poland	6	30%
Switzerland	7	29%
Korea (ROK)	8	28%
Denmark	9	22%
Italy	10	19%

Top origin markets travelling to Central and Eastern Europe with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
China	1	43%
Saudi Arabia	2	40%
India	3	29%
Georgia	4	26%
Azerbaijan	5	20%
Vietnam	6	14%
Denmark	7	11%
Israel	8	11%
Spain	9	10%
Belgium	10	10%

Source: Navigator360™ as of Monday, 5 May 2025

Who is searching and visiting Central and Eastern Europe analysis

High search growth is not always matched by travel volume:
Markets like India show very high growth in search activity (India +69%), yet their ranking in actual travel remain modest-likely due to longer lead times, infrastructure, or booking preferences.

Emerging markets are fueling growth:
Countries such as Azerbaijan, Georgia, and Saudi Arabia are driving a notable share of the increase in actual visitors to Central and Eastern Europe. Their strong performance suggests growing regional connectivity and rising interest in lesser-known destinations.

Recommendation for DMOs:
It may be worth nurturing interest from fast-growing long-haul markets-like China, India and Saudi Arabia-through targeted visibility and partnerships, while also reinforcing air access and travel readiness to help convert rising intent into future bookings.

Where do people from Central and Eastern Europe travel to? Reality vs. aspirations

Top origin markets searching for Central and Eastern Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Poland	1	1
Hungary	3	2
Romania	2	3
Czech Republic	4	4
Kazakhstan	5	5
Georgia	7	6
Bulgaria	6	7
Uzbekistan	8	8
Azerbaijan	9	9

Top origin markets travelling to Central and Eastern Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking	May 24 - Apr 25 vs May 23 - Apr 24
Kazakhstan	1	1	7%
Poland	2	2	-4%
Romania	3	3	0%
Czech Republic	4	4	6%
Azerbaijan	5	5	26%
Hungary	6	6	3%
Uzbekistan	7	7	4%
Georgia	8	8	5%
Bulgaria	9	9	6%

Source: Navigator360™ as of Monday, 5 May 2025

Top performing destinations in Central and Eastern Europe

Top searched destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Azerbaijan	1	42%
Turkmenistan	2	36%
Georgia	3	33%
Hungary	4	24%
Poland	5	20%
Czech Republic	6	19%
Estonia	7	18%
Kazakhstan	8	16%
Belarus	9	15%
Rep. Moldova	10	15%

Top booked destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Azerbaijan	1	26%
Turkmenistan	2	11%
Slovakia	3	10%
Rep. Moldova	4	9%
Tajikistan	5	7%
Kazakhstan	6	7%
Bulgaria	7	6%
Czech Republic	8	6%
Georgia	9	5%

Source: Navigator360™ as of Monday, 5 May 2025

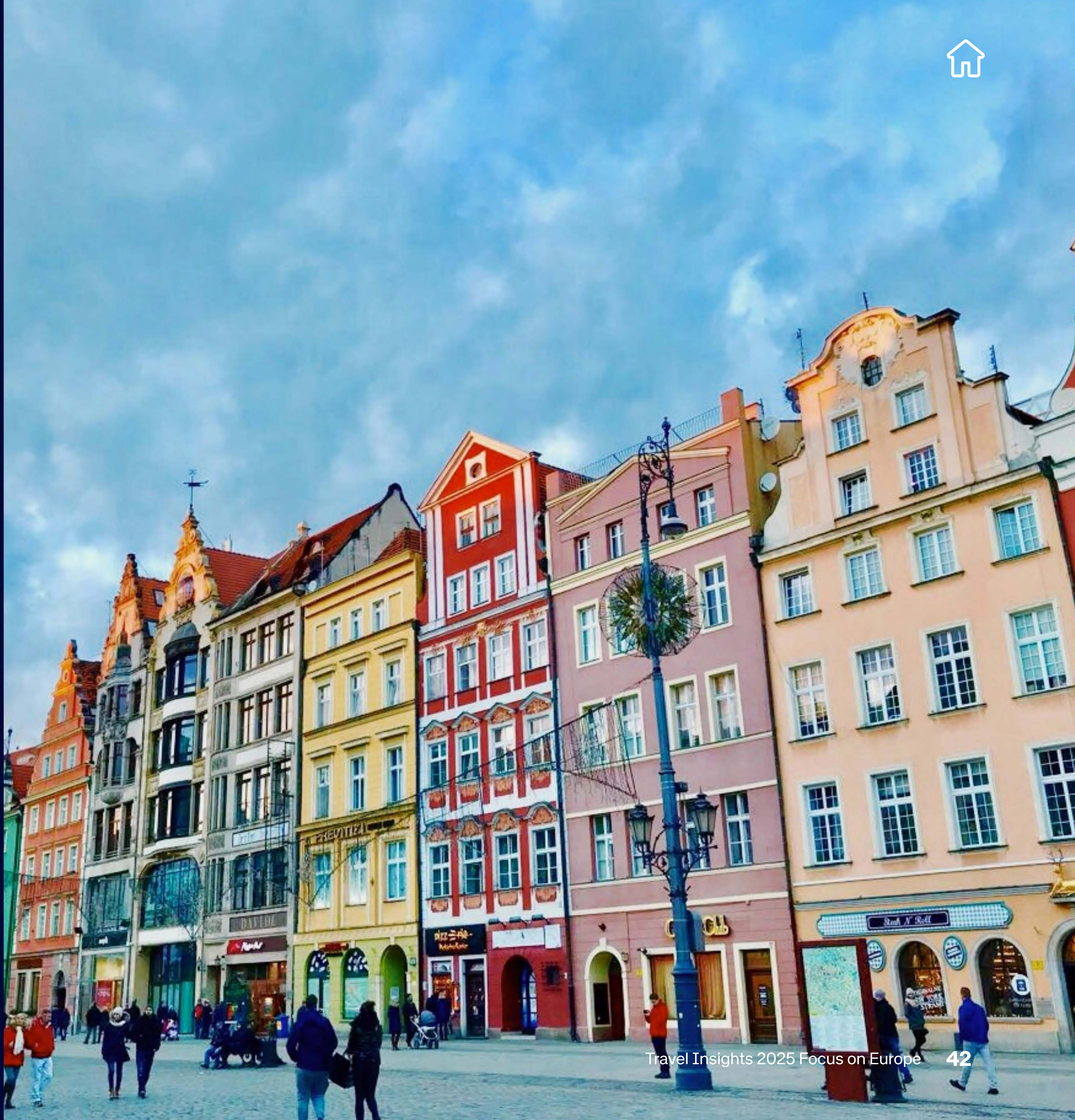
Where visitors are going in Central and Eastern Europe analysis

Poland and Kazakhstan remain key anchors:
Poland continues to lead in travel intent (searches), while Kazakhstan holds the top spot in actual bookings, reflecting strong regional dynamics and repeat visitation or connectivity strength.

Azerbaijan and Turkmenistan stand out in growth:
Both destinations show high year-on-year increases in searches and bookings, particularly Azerbaijan, which tops the charts in both categories. This suggests growing visibility and appeal, potentially linked to regional promotion or improved air links.

Rising momentum across a diverse set of markets:
From Slovakia and Rep. Moldova in bookings to Georgia and Hungary in searches, a broad mix of destinations are gaining traction-highlighting how interest in Central and Eastern Europe is becoming more geographically diverse and dynamic.

Recommendation for DMOs:
There could be value in nurturing collaborative storytelling across the region-positioning Central and Eastern Europe not only through individual destinations but also as a multi-country travel experience, capitalising on shared growth and rising traveller curiosity.



Where do visitors go? Reality vs. aspirations

Top searched destination cities in Central and Eastern Europe

Destination cities	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Budapest (HU)	1	1
Prague (CZ)	2	2
Warsaw (PL)	3	3
Bucharest (RO)	4	4
Krakow (PL)	5	5
Tbilisi (GE)	6	6
Baku (AZ)	7	7
Tashkent (UZ)	9	8
Sofia (BG)	8	9

Top booked destination cities in Central and Eastern Europe

Destination cities	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking	May 24 - Apr 25 vs May 23 - Apr 24
Almaty (KZ)	1	1	12%
Astana (KZ)	2	2	4%
Prague (CZ)	4	3	6%
Warsaw (PL)	3	4	-6%
Baku (AZ)	7	5	26%
Bucharest (RO)	5	6	1%
Budapest (HU)	6	7	2%
Tashkent (UZ)	9	8	6%
Tbilisi (GE)	8	9	3%

Source: Navigator360™ as of Monday, 5 May 2025

Top performing destinations in Central and Eastern Europe

Top searched destination cities with the highest growth (among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Baku (AZ)	1	44%
Tbilisi (GE)	2	38%
Batumi (GE)	3	33%
Almaty (KZ)	4	31%
Poznan (PL)	5	26%
Budapest (HU)	6	25%
Tashkent (UZ)	7	24%
Krakow (PL)	8	24%
Gdansk (PL)	9	23%
Warsaw (PL)	10	20%

Top booked destination cities with the highest growth (among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Baku (AZ)	1	26%
Batumi (GE)	2	26%
Ust-Kamenogorsk (KZ)	3	23%
Shymkent (KZ)	4	14%
Almaty (KZ)	5	12%
Aktobe (KZ)	6	12%
Chisinau (MD)	7	9%
Varna (BG)	8	8%
Shevchenko (KZ)	9	7%

Source: Navigator360™ as of Monday, 5 May 2025

Where are visitors going in Central and Eastern Europe?

Azerbaijan and Georgia cities are driving urban growth:
Baku (BAK) and Tbilisi (TBS) are leading both in search and booking growth, each showing over 35% year-on-year increase. This reflects growing traveller interest in culturally rich but previously underexplored urban hubs.

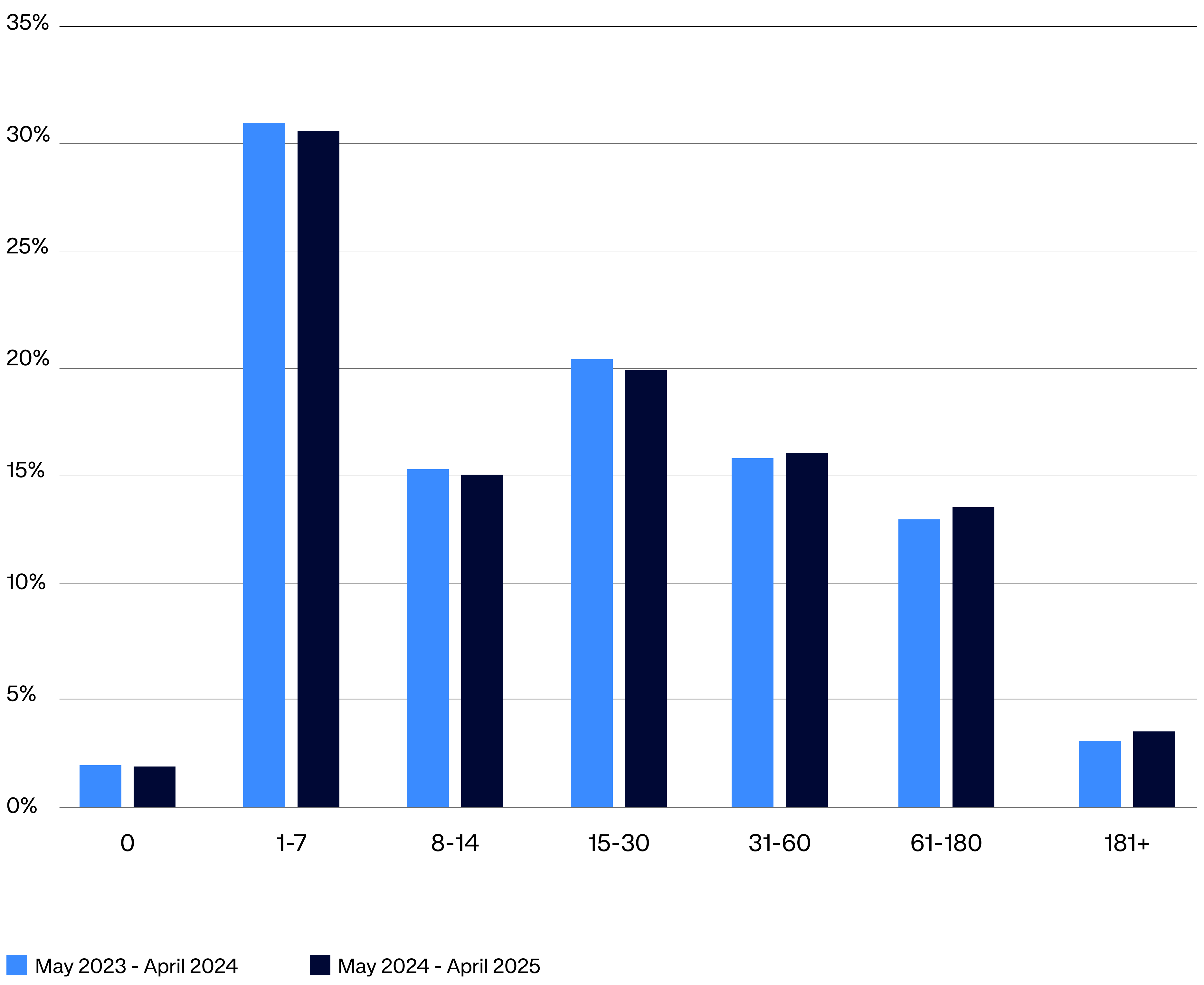
Kazakhstan dominates the bookings chart:
Two cities-Almaty, Astana, rank among the top 10 for bookings, indicating that Kazakhstan is becoming a regional powerhouse for travel, especially in terms of intra-regional connectivity and interest.

Polish cities show strong aspirational appeal:
Warsaw, Kraków, and Gdańsk appear across the top 10 searched cities, with Gdańsk and Poznań showing 20-26% year-on-year search growth. While not all of this demand is converting yet, it highlights potential for continued urban tourism development in Poland.

Recommendation for DMOs:
It may be worthwhile to spotlight rising second-tier and non-capital cities in marketing campaigns-particularly those showing strong year-on-year growth in interest or bookings-to diversify urban travel and distribute visitation more evenly across regions.

Air travel bookings to Central and Eastern Europe by lead time

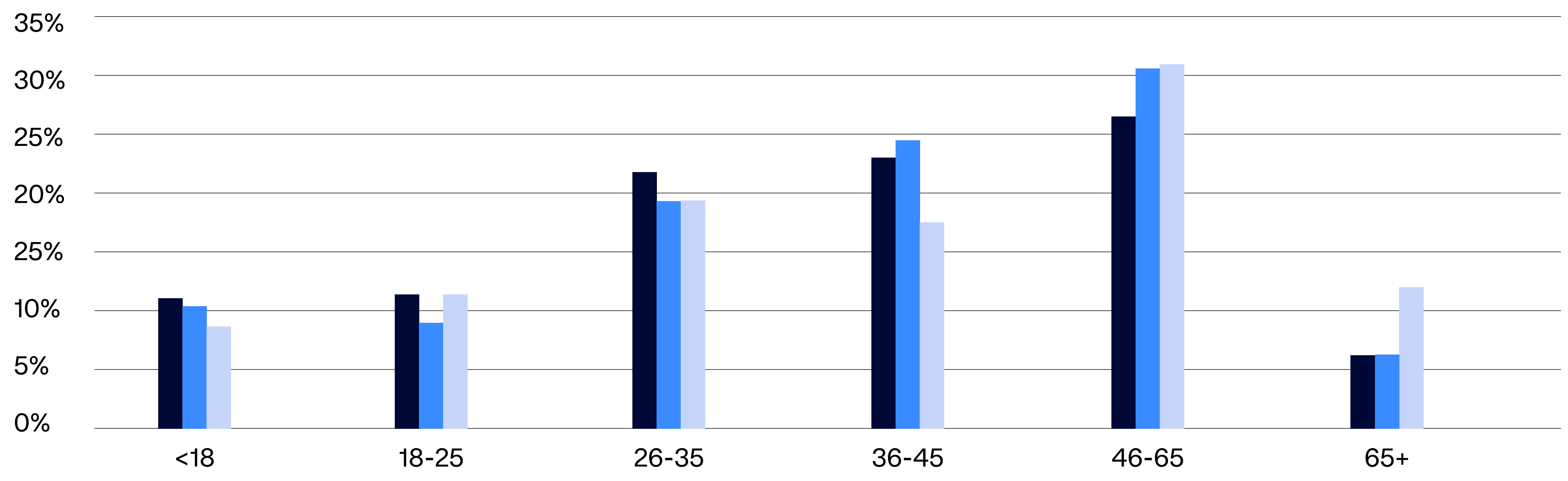
Percentage of passengers booked by lead time (in days)



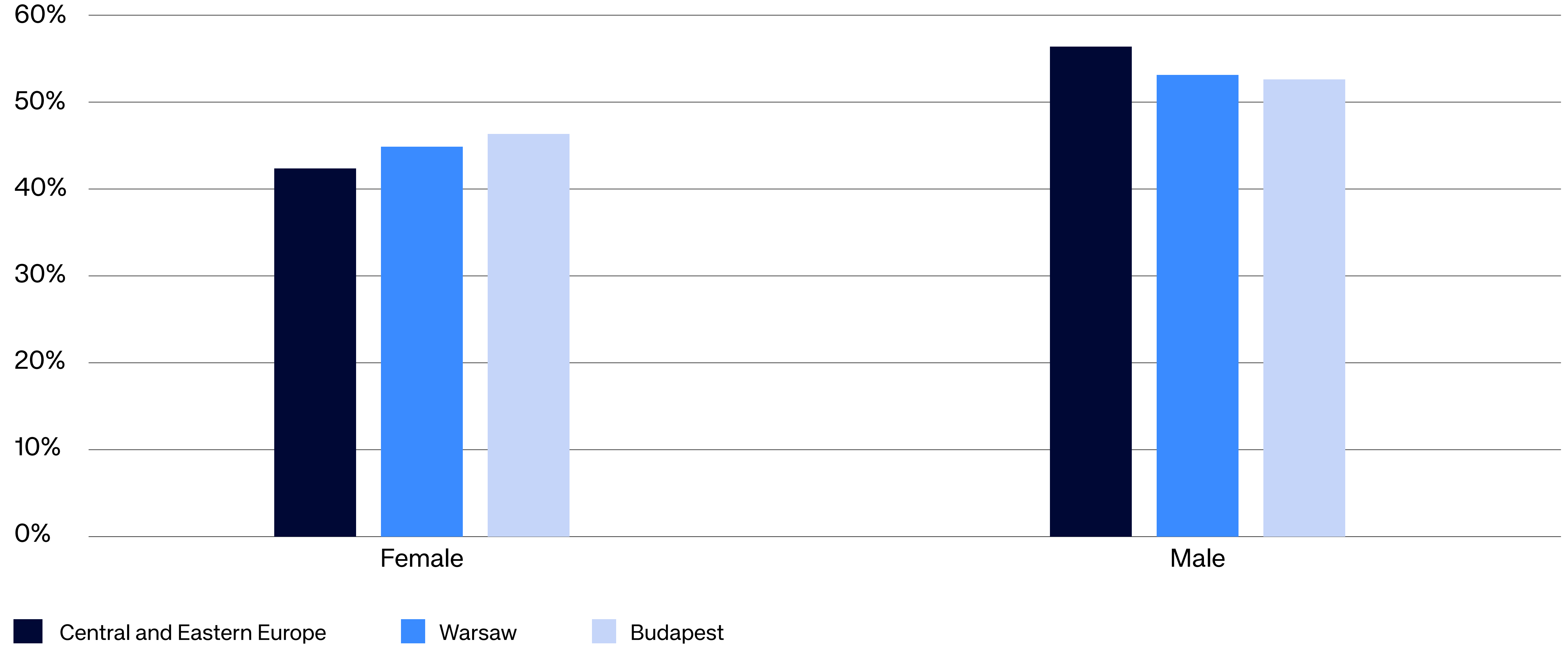
Source: Navigator360™ as of Monday, 5 May 2025

What type of travellers travel to Central and Eastern Europe: top destination cities

Percentage of passengers booked by age category



Percentage of passengers booked by gender



Source: Navigator360™ as of Sunday, 25 May 2025

Lead time and profile analysis

Short booking windows remain the norm:
Nearly 1 in 3 travellers to Central and Eastern Europe book their trip within 1-7 days of departure, showing a clear preference for spontaneous or last-minute travel-similar to previous years.

Older travellers make up the largest segment:
The 46-65 age group dominates travel to the region, followed by the 36-45 bracket. This indicates that Central and Eastern Europe attracts more mature travellers, possibly due to cultural, historical, or affordability factors.

Recommendation for DMOs:
It may be helpful to consider messaging that speaks to both spontaneous travellers and mature audiences-emphasising flexible offers, cultural depth, and ease of travel to encourage short lead-time bookings while nurturing return visits.

631 new routes in Central and Eastern Europe

Origin country	New routes
China	55
Türkiye	53
Greece	43
Spain	43
Italy	42
Germany	41
Egypt	34
Tunisia	24
Kazakhstan	17

Top new international routes (based on seat capacity)

New routes	Origin market	Destination market
CAN-BUD	China	Hungary
SHJ-KRK	United Arab Emirates	Poland
BJS-PRG	China	Czech Republic
NBE-PRG	Tunisia	Czech Republic
NYC-BUH	United States	Romania
ADD-WAW	Ethiopia	Poland
IST-BTS	Türkiye	Slovakia
BUD-XHV	Hungary	Romania

Source: Navigator360™ as of Sunday, 11 May 2025

New routes analysis

Significant network expansion:
Central and Eastern Europe saw the introduction of 1033 new routes, indicating major investment in regional accessibility and air connectivity. This positions the region for continued tourism growth and improved international reach.

Türkiye is leading new route origins
Türkiye is a key contributor to the region's expanded connectivity, followed closely by Greece, Italy, and Spain. This suggests strong intra-regional travel potential, and cultural and tourism ties.

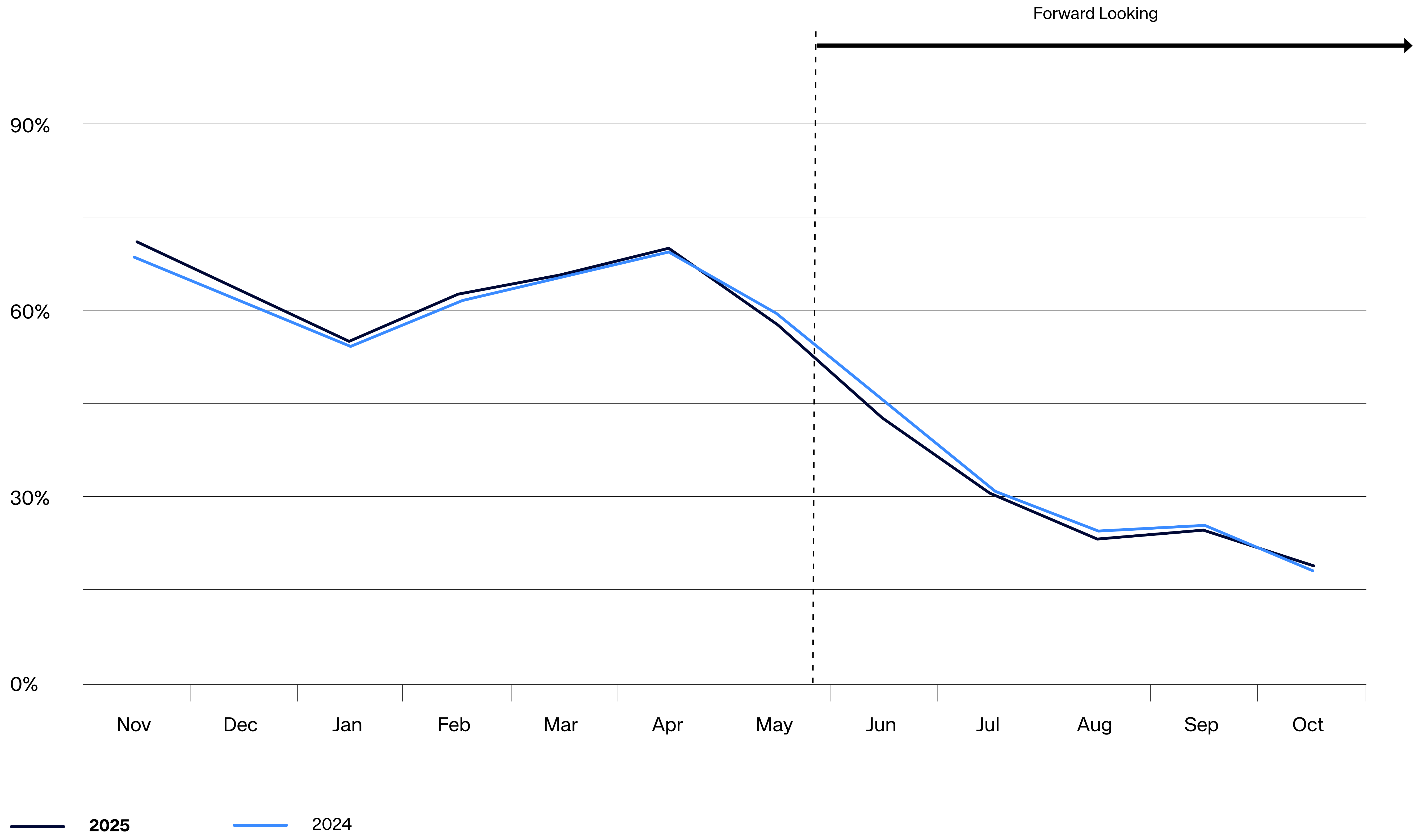
China and long-haul markets strengthen presence:
New routes from China (e.g. Beijing–Prague, Guangzhou–Budapest) and the United States (New York-Bucharest) highlight growing interest from long-haul markets and suggest increased opportunities for transcontinental tourism.

Recommendation for DMOs:
It might be beneficial to align marketing efforts with newly opened routes-especially from long-haul or high-capacity markets-to capitalise on increased accessibility and stimulate demand in areas connected by these recent air service expansions.

Hospitality occupancy overview

Hotel occupancy in Central and Eastern Europe

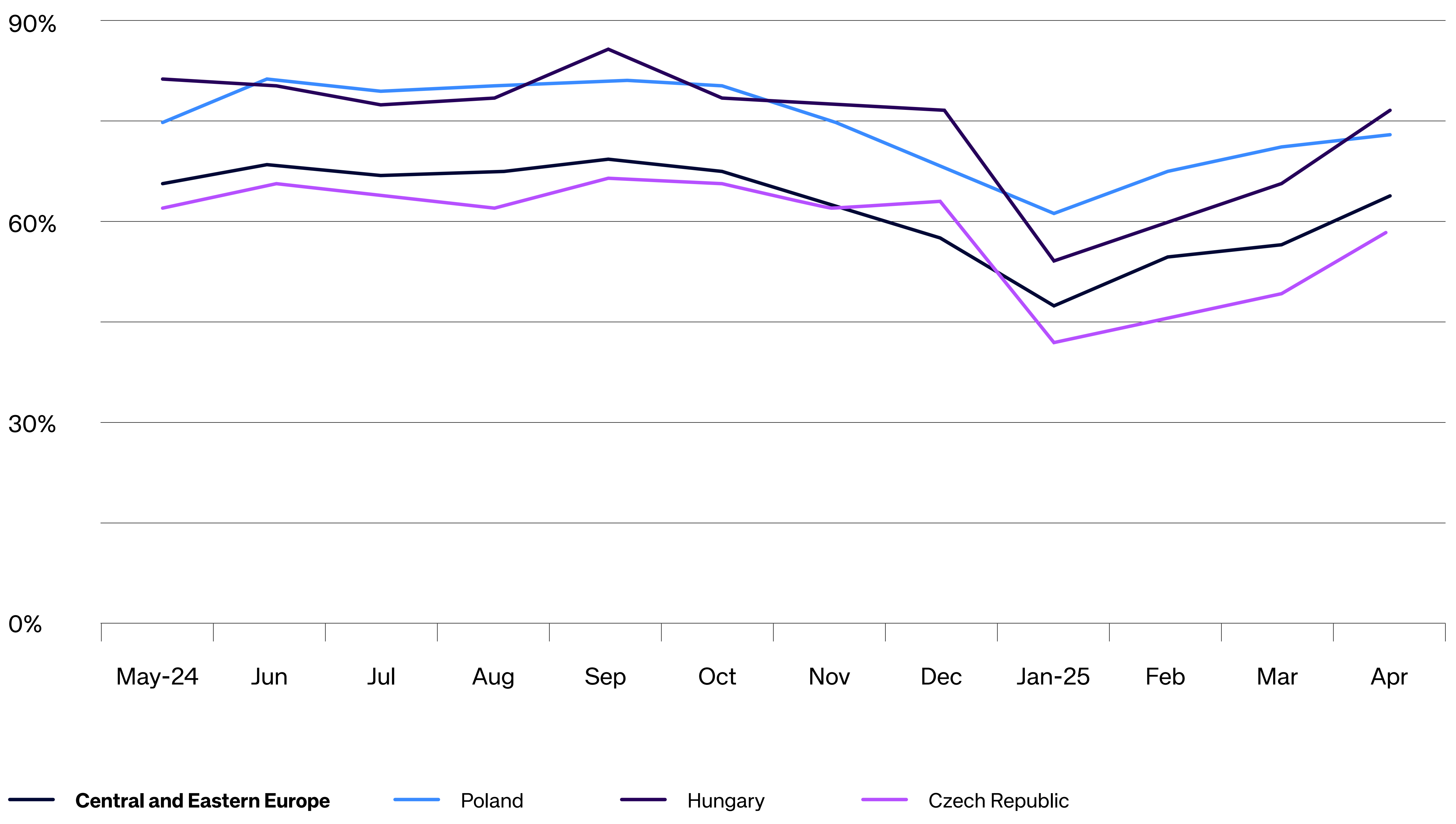
On-the-books by month compared to same month last year (%)



Source: Navigator360™ as of Monday, 11 May 2025

Hotel occupancy for the past 12 months

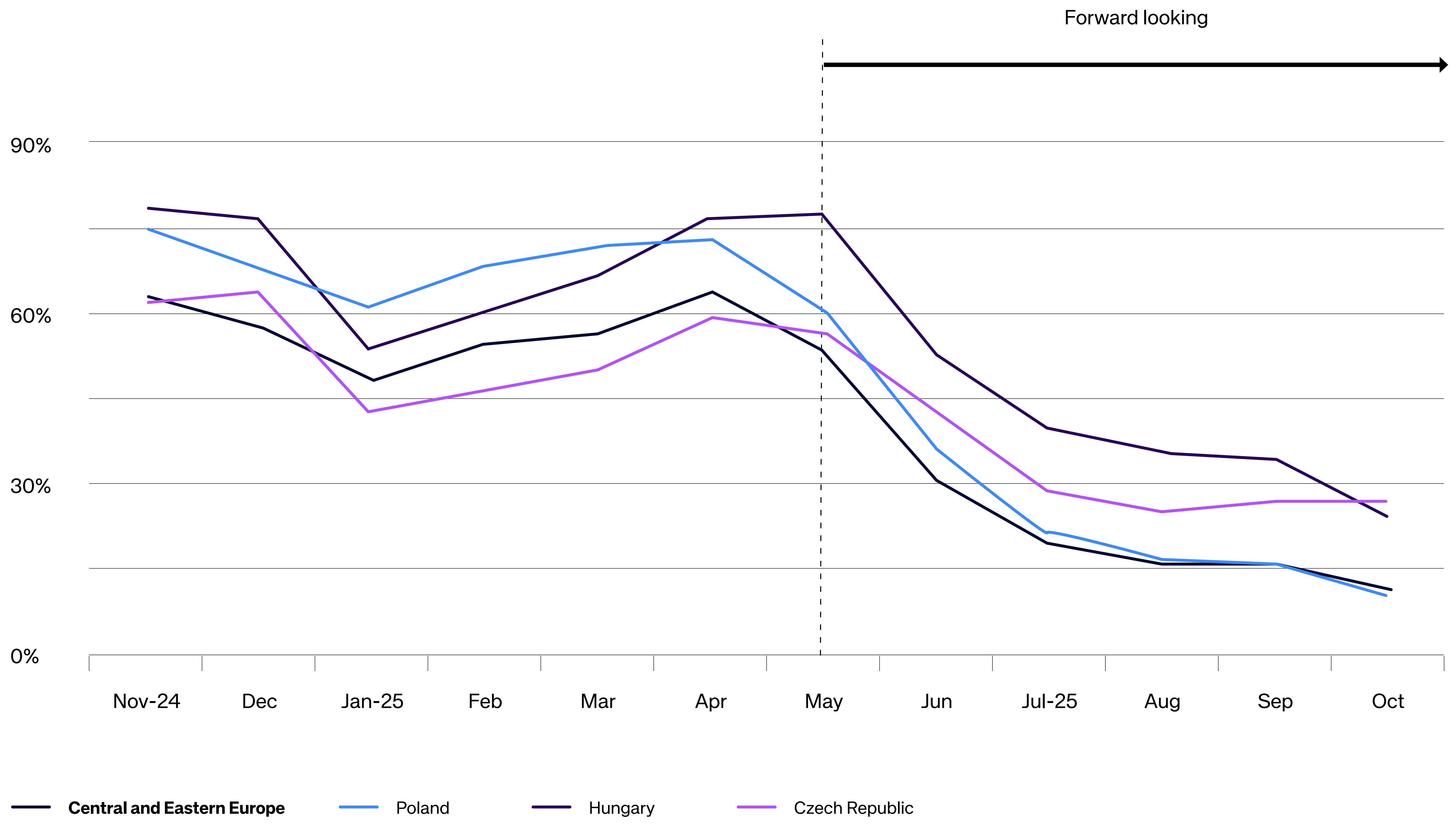
For Central and Eastern Europe and its Top markets



Source: Navigator360™ as of Sunday, 11 May 2025

Hotel occupancy on-the-books

For Central and Eastern Europe and its Top markets



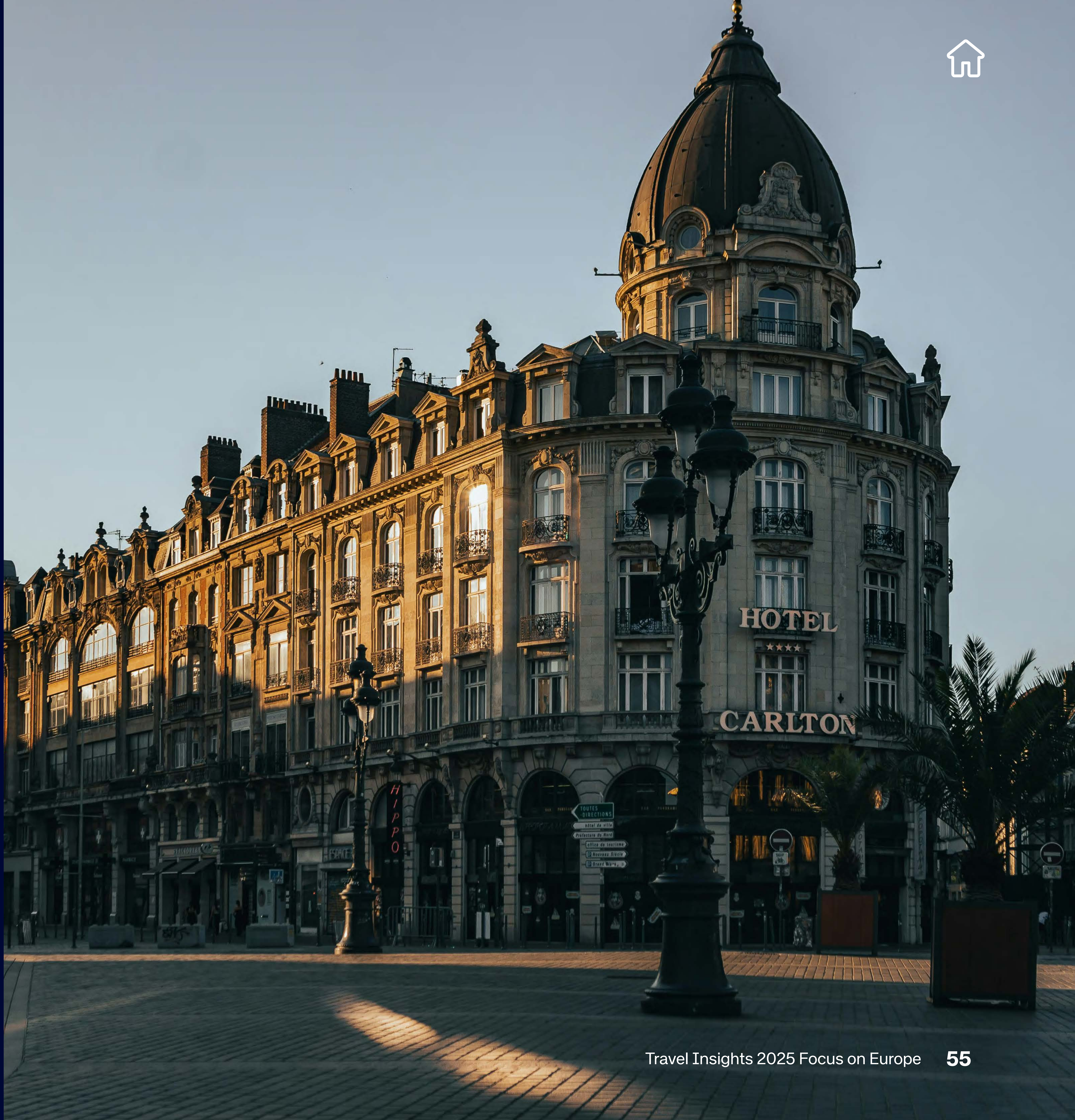
Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy in Central and Eastern Europe analysis

Forward-looking bookings still building:
As seen in past booking behaviour, forward-looking occupancy currently appears lower from May onward, which is typical given short lead times. Based on historical patterns, booking activity tends to ramp up as travel dates approach.

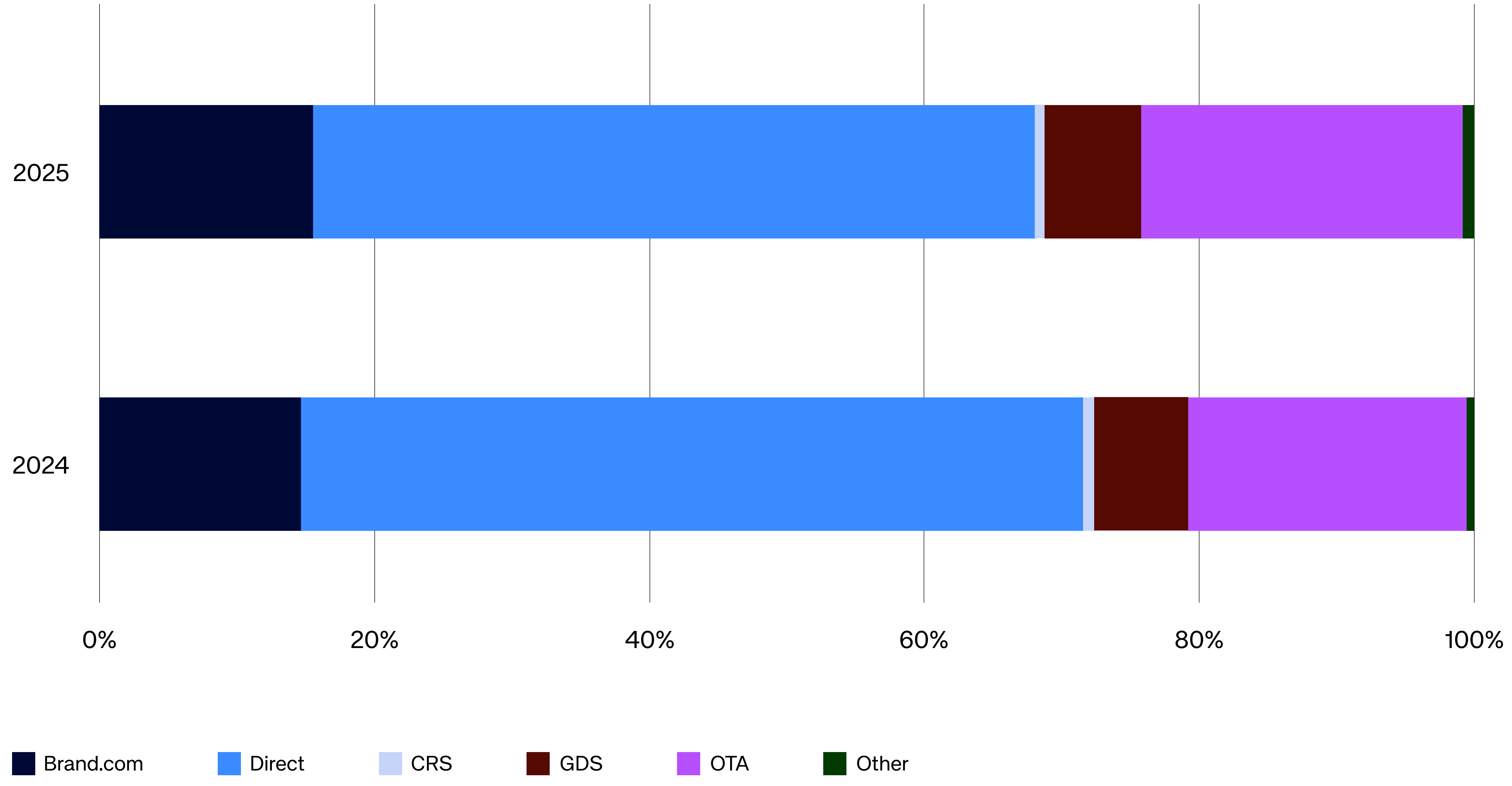
Hungary and Poland leads among key markets:
Hungary and Poland consistently outperformed other markets in hotel occupancy over the past 12 months and continues to show resilience into the forward-looking window, suggesting strong appeal or a well-balanced mix of demand drivers.

Recommendation for DMOs:
It may be valuable to time campaigns and tactical offers around short booking windows-especially for summer-while highlighting regional standouts like Hungary and Poland as success stories for year-round travel.



Hotel channel mix in Central/ Eastern Europe

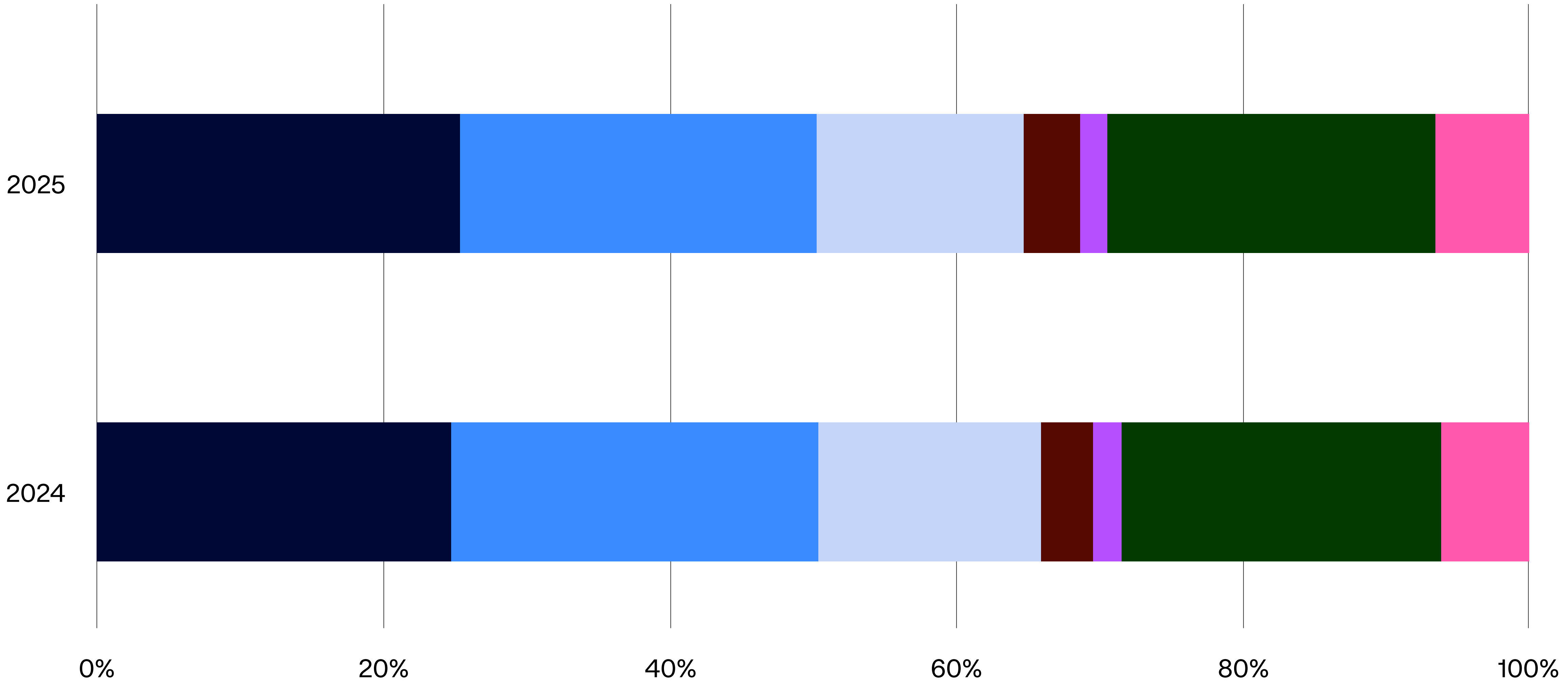
On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Sunday, 11 May 2025

Hotel segmentation in Central and Eastern Europe

On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Sunday, 11 May 2025

Hotel segmentation and channel analysis in Central and Eastern Europe

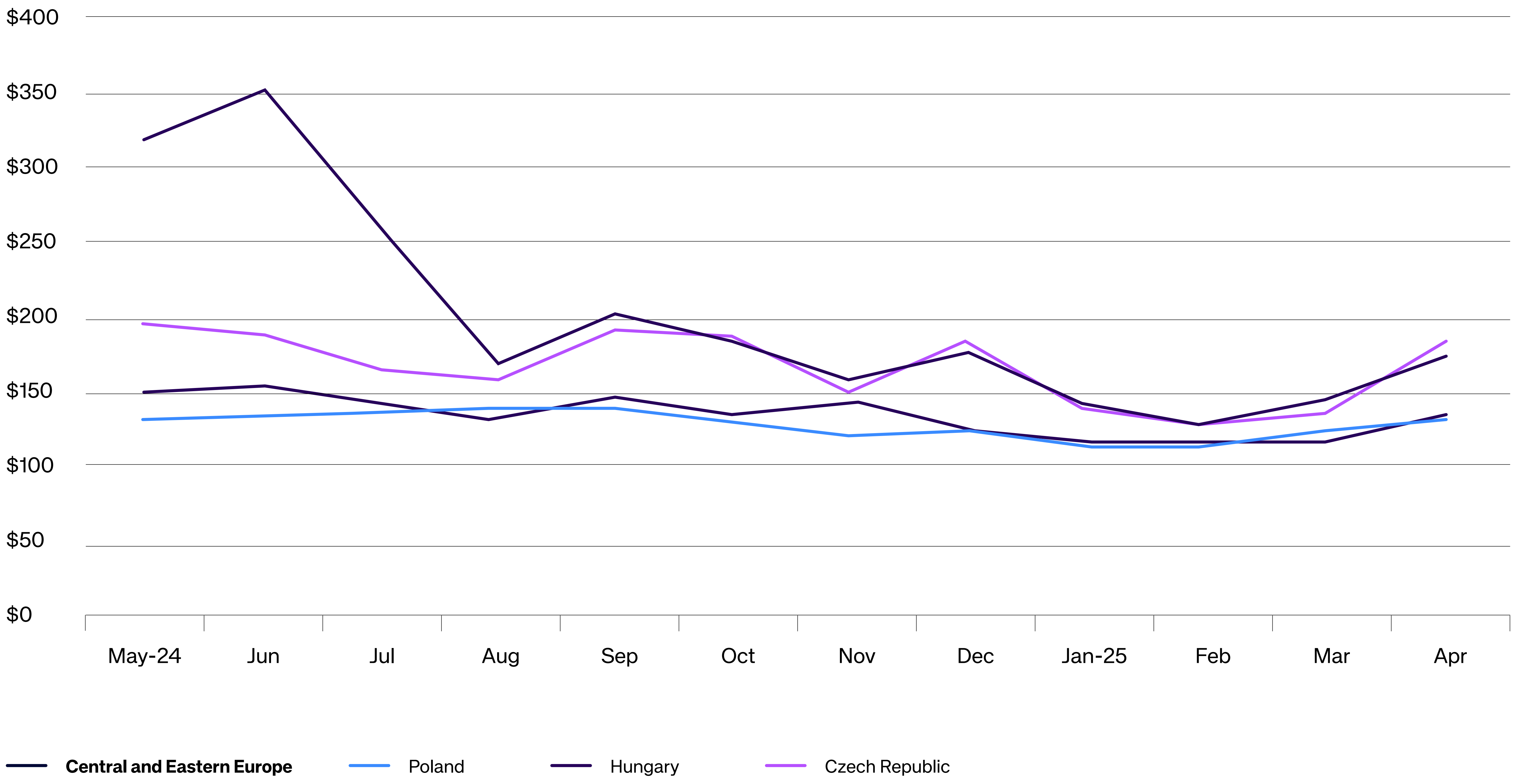
OTAs growth:
Online Travel Agencies (OTAs) show a good increase in bookings year-over-year. This underscores their ongoing importance for visibility and volume, particularly for international travellers.

Growth in direct channels:
There is a slight increase in brand.com bookings, suggesting growing consumer confidence in booking directly, possibly driven by loyalty programs, pricing transparency, or improved user experience on brand platforms.

Group and negotiated segments are expanding:
In the segmentation breakdown, the group sold and negotiated segments have grown slightly, indicating a rise in structured or corporate-driven travel, which may complement the broader leisure market.

Recommendation for DMOs:
It could be useful to support both OTA visibility and direct booking initiatives-ensuring that destination content and promotional offers are optimised across all key touchpoints to reach both spontaneous travellers and planned group segments.

Average daily rate (ADR) in USD



Source: Navigator360™ as of Sunday, 11 May 2025

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Hotel ADR analysis

Hungary shows strong ADR peaks:
Hungary stands out with significantly higher ADRs in the early summer months-reaching above $350 in June-which may reflect premium demand in Budapest or seasonal events driving up prices.

General price stability across the region:
ADR for Poland, remain consistently between $120-$150, suggesting affordable positioning and potential appeal to price-sensitive segments, even during peak months.

Recommendation for DMOs:
There could be value in communicating the region's diverse pricing landscape-from high-end seasonal offerings in hubs like Budapest to year-round value in other cities-to attract a wide range of travellers and support tailored positioning per destination.

Central and Eastern Europe destinations included in this analysis

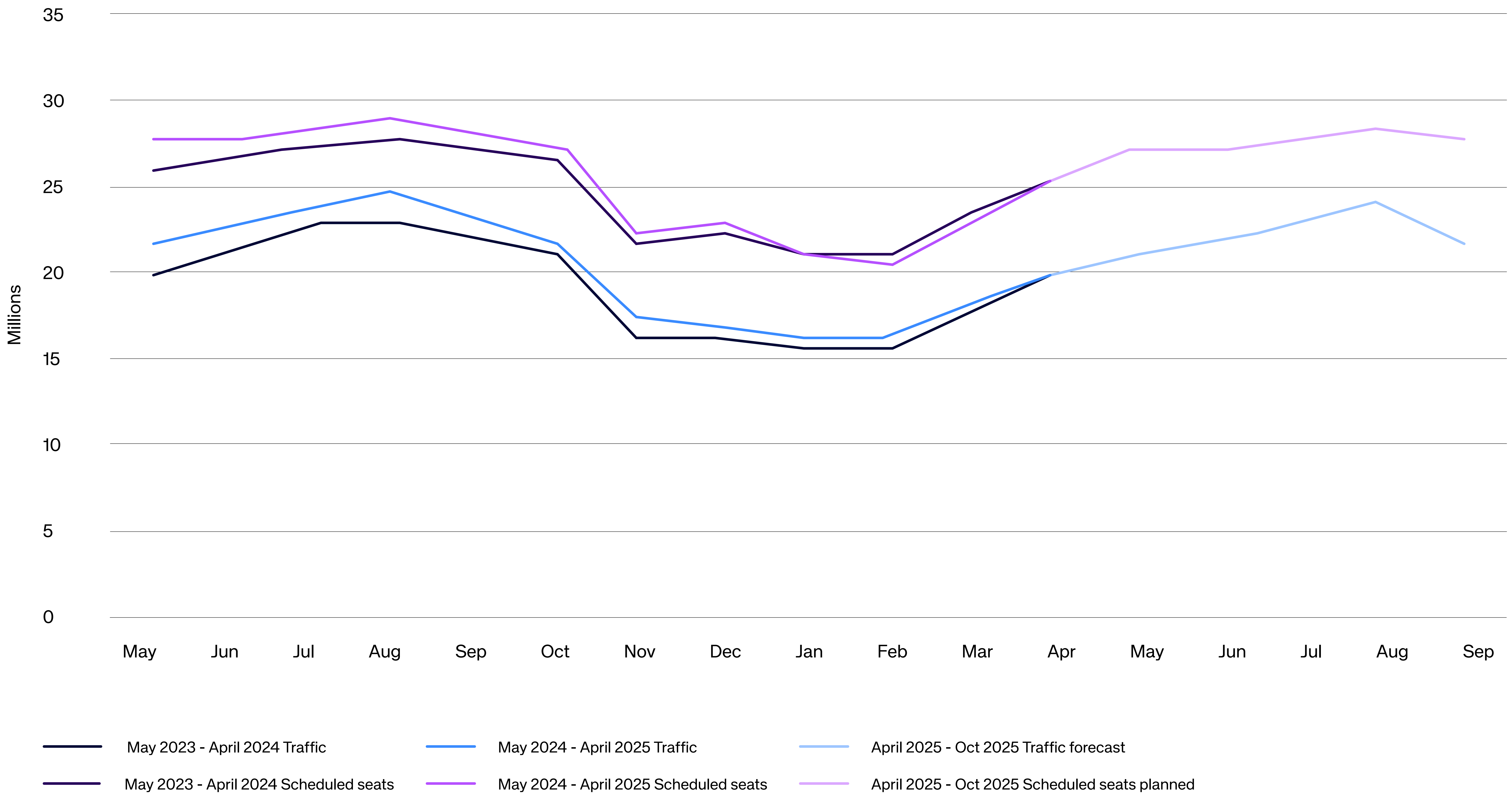
Destination country name	Sub region
Armenia	Central and Eastern Europe
Azerbaijan	Central and Eastern Europe
Belarus	Central and Eastern Europe
Bulgaria	Central and Eastern Europe
Czech Republic	Central and Eastern Europe
Estonia	Central and Eastern Europe
Georgia	Central and Eastern Europe
Hungary	Central and Eastern Europe
Kazakhstan	Central and Eastern Europe
Kyrgyzstan	Central and Eastern Europe
Latvia	Central and Eastern Europe
Lithuania	Central and Eastern Europe
Rep. Moldova	Central and Eastern Europe
Poland	Central and Eastern Europe
Romania	Central and Eastern Europe
Slovakia	Central and Eastern Europe
Tajikistan	Central and Eastern Europe
Ukraine	Central and Eastern Europe
Uzbekistan	Central and Eastern Europe

Europe - Northern Europe

Air travel overview

Worldwide to Northern Europe

Air passenger volume and scheduled seats



Source: Navigator360™ as of Monday, 5 May 2025

4.3% growth

Passenger traffic and capacity analysis in Northern Europe

Moderate growth trajectory:
Passenger traffic to Northern Europe is expected to grow by 4.3% year-on-year-a more modest increase compared to other European regions. This suggests a stable but mature market, potentially driven by consistent demand rather than emerging expansion.

Capacity growth outpaces demand:
From May-September 2025, scheduled air capacity rises more sharply than forecast traffic, especially in peak months like July and August. This may indicate airlines' confidence in demand recovery, or strategic deployment to capture market share.

Typical seasonal drop evident in winter:
The winter months continue to show the usual dip in both traffic and capacity, reaffirming Northern Europe's strong seasonal appeal-with summer clearly driving the bulk of annual visitor volumes.

Recommendation for DMOs:
It could be helpful to strengthen demand during shoulder and off-peak seasons-by promoting unique seasonal experiences or niche travel themes-to help maximise the value of increasing capacity throughout the year.

Where do visitors come from? Reality vs. aspirations

Top origin markets searching for travel to Northern Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
United States	1	1
United Kingdom	2	2
Spain	3	3
Germany	4	4
Italy	5	5
France	6	6
India	7	7
China	21	8
Canada	8	9
Norway	12	10

Top origin markets travelling to Northern Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Norway	1	1
United States	2	2
United Kingdom	5	3
Sweden	3	4
Germany	6	5
India	4	6
Denmark	7	7
Spain	9	8
Australia	8	9
Italy	11	10

Source: Navigator360™ as of Monday, 5 May 2025

Are travellers from these origin markets to Northern Europe already on your radar?

Top origin markets searching for travel to Northern Europe with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
China	1	155%
Japan	2	48%
Saudi Arabia	3	47%
Norway	4	37%
Germany	5	22%
Finland	6	21%
Thailand	7	19%
Hong Kong (China)	8	19%
Korea (ROK)	9	17%
Denmark	10	16%

Top origin markets travelling to Northern Europe with the highestrowth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Japan	1	18%
Saudi Arabia	2	10%
Ireland	3	10%
Poland	4	7%
Italy	5	6%
Spain	6	3%
Portugal	7	2%
Norway	8	1%
Denmark	9	0%
France	10	0%

Source: Navigator360™ as of Monday, 5 May 2025

Who is searching and visiting Northern Europe analysis

United States and United Kingdom lead in searches and arrivals:
The United States and United Kingdom remain top origin markets both in terms of searches and actual arrivals, highlighting their consistent demand and travel conversion for Northern Europe.

Emerging interest from Asia and the Middle East:
Several Asian and Middle Eastern markets-China, Japan, Saudi Arabia, Korea (ROK)-are among the fastest-growing in terms of search activity, with some, like Japan and Saudi Arabia, also showing double-digit booking growth. These markets could present high-potential future demand.

Mismatch between search and arrival rankings:
Countries like France appear high in the search rankings but are not yet reflected among the top arriving markets, suggesting interest not fully converting to bookings yet, which may point to barriers in accessibility, marketing, or distribution.

Recommendation for DMOs:
There may be value in exploring more targeted engagement in high-growth aspirational markets like Japan, China, and Saudi Arabia-particularly through partnerships or campaigns that address booking conversion and promote accessibility to Northern Europe.

Where do travellers go in Northern Europe? Reality vs. aspirations

Top searched destinations in Northern Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
United Kingdom	1	1
Norway	5	2
Denmark	3	3
Ireland	2	4
Sweden	4	5
Finland	7	6
Iceland	6	7

Top booked destinations in Northern Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking	May 24 - Apr 25 vs May 23 - Apr 24
United Kingdom	1	1	-9%
Norway	2	2	4%
Sweden	3	3	-2%
Denmark	4	4	-2%
Ireland	5	5	1%
Finland	6	6	-3%
Iceland	7	7	-2%

Source: Navigator360™ as of Monday, 5 May 2025

Top performing destinations being searched and booked in Northern Europe

Top searched destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Norway	1	39%
Finland	2	36%
Sweden	3	25%
Denmark	4	24%
Iceland	5	13%
Ireland	6	7%
United Kingdom	7	5%

Top booked destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Norway	1	4%
Ireland	2	1%
Iceland	3	-2%
Denmark	4	-2%
Sweden	5	-2%
Finland	6	-3%
United Kingdom	7	-9%

Source: Navigator360™ as of Monday, 5 May 2025

Where are travellers going in Northern Europe analysis

Strong aspiration for Norway, Denmark and Finland:
Norway is not only the most searched destination in Northern Europe but also leads in booking growth (+4%), suggesting strong and growing appeal. Finland and Denmark also show significant search growth (+36% and +24%, respectively), despite more modest booking changes.

United Kingdom remains the top booked destination but lags in growth:
Although the United Kingdom maintains the #1 spot in both searches and bookings, its year-on-year booking growth is the weakest at -9%, indicating potential saturation or softening demand.

Balanced alignment between aspirations and bookings:
Most destinations maintain consistent rankings between searches and actual bookings, pointing to alignment between traveller interest and final travel decisions-especially true for Denmark and Iceland.

Recommendation for DMOs:
Capitalise on high search growth destinations (e.g. Norway, Finland, Sweden). These countries show strong aspirational interest and positive booking momentum. Consider targeted marketing campaigns to convert high interest into bookings-especially leveraging the seasonal draw of Northern Europe's natural attractions (e.g. fjords, aurora, summer festivals).

Where do visitors go? Reality vs. aspirations

Top searched destinations in Northern Europe

Destination cities	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
London (GB)	1	1
Dublin (IE)	2	2
Copenhagen (DK)	4	3
Manchester (GB)	3	4
Stockholm (SE)	5	5
Oslo (NO)	8	6
Edinburgh (GB)	6	7
Reykjavik (IS)	7	8
Helsinki (FI)	9	9
Birmingham (GB)	10	10

Top booked destinations in Northern Europe

Destination cities	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking	May 24 - Apr 25 vs May 23 - Apr 24
London (GB)	1	1	-8%
Copenhagen (DK)	2	2	-1%
Oslo (NO)	3	3	2%
Stockholm (SE)	4	4	0%
Dublin (IE)	5	5	0%
Manchester (GB)	6	6	-10%
Helsinki (FI)	7	7	-4%
Reykjavik (IS)	8	8	-1%
Bergen (NO)	9	9	3%
Edinburgh (GB)	10	10	1%

Source: Navigator360™ as of Monday, 5 May 2025

Top performing destinations in Northern Europe

Top searched destinations with the highest growth
(among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Tromso (NO)	1	64%
Rovaniemi (FI)	2	63%
Bergen (NO)	3	41%
Oslo (NO)	4	36%
Helsinki (FI)	5	34%
Stavanger (NO)	6	31%
Trondheim (NO)	7	30%
Copenhagen (DK)	8	30%
Stockholm (SE)	9	27%
Goeteborg (SE)	10	23%

Top booked destinations with the highest growth
(among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Harstad (NO)	1	13%
Kristiansund (NO)	2	13%
Bodo (NO)	3	11%
Rovaniemi (FI)	4	7%
Tromso (NO)	5	7%
Bergen (NO)	6	3%
Alesund (NO)	7	3%
Oslo (NO)	8	2%
Edinburgh (GB)	9	1%
Dublin (IE)	10	0%

Source: Navigator360™ as of Monday, 5 May 2025

Which cities do travellers visit in Northern Europe?

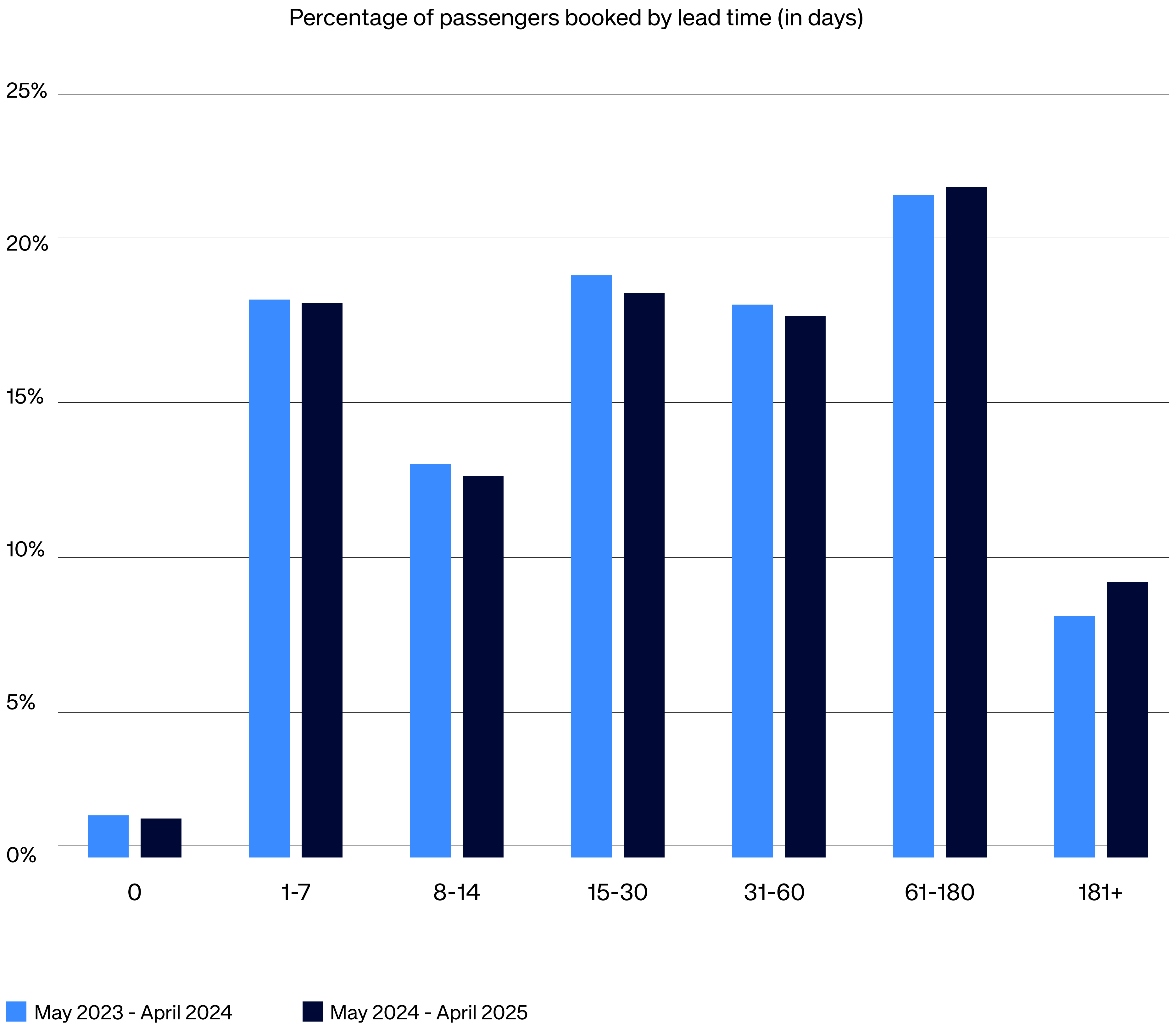
London remains the top destination by far:
London continues to lead both in search interest and bookings, maintaining its #1 position in both categories year-over-year. This confirms its role as the anchor city for Northern Europe travel.

Rising interest in secondary Norwegian and Finnish cities:
Several emerging Nordic cities-like Tromsø (TOS), Rovaniemi (RVN), and Bergen (BGO)-are seeing strong year-on-year growth in searches (up to 64%) and bookings, indicating increasing traveller appetite for nature-based and seasonal destinations.

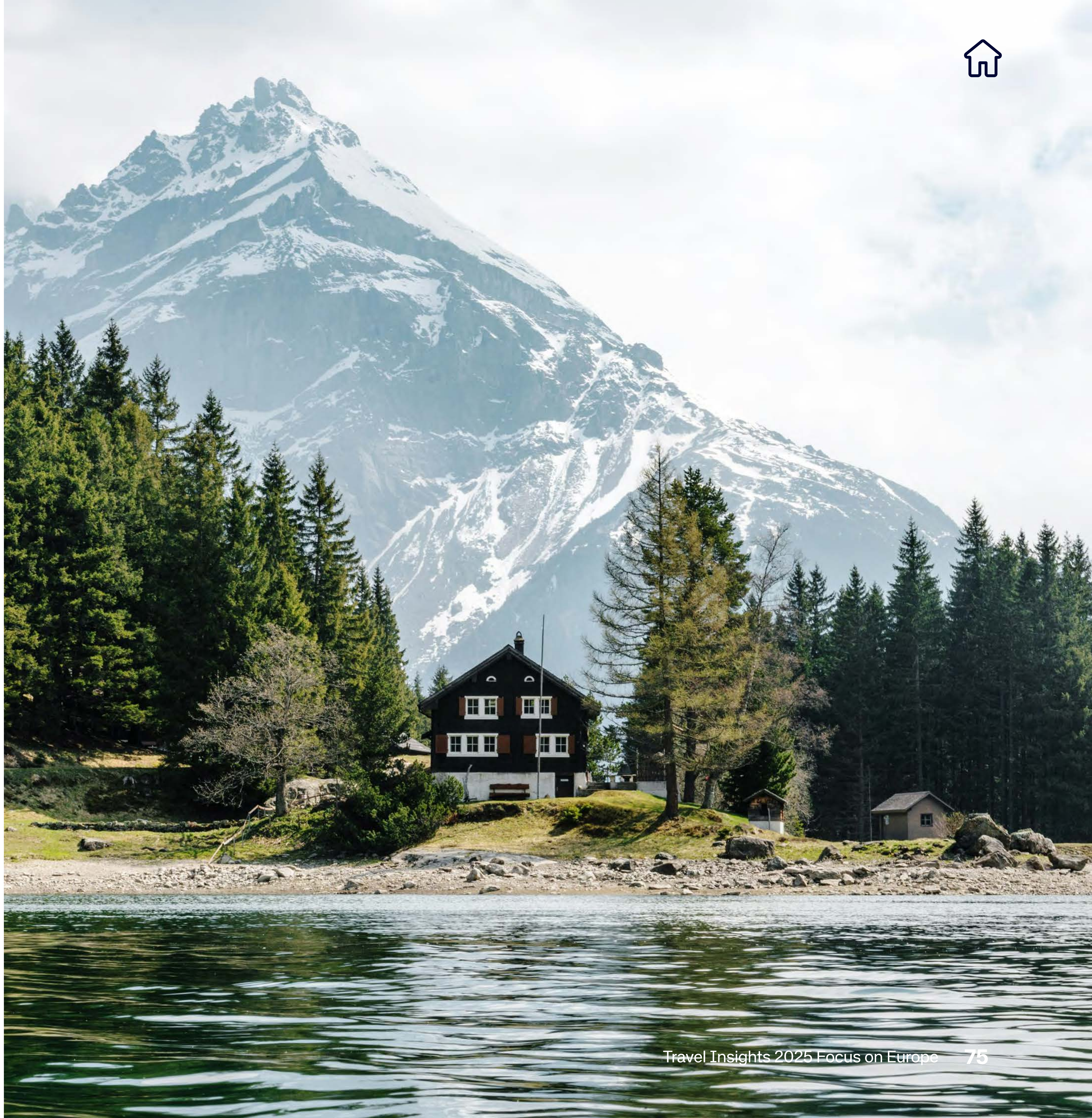
Opportunity gap in high-growth search cities:
Destinations such as Stavanger (SVG), Trondheim (TRD), and Gothenburg (GOT) appear in the top 10 for search growth but are not yet reflected in the fastest-growing bookings list, highlighting conversion potential if supported by the right access and promotion.

Recommendation for DMOs:
Capitalise on rising interest in secondary Nordic destinations by aligning marketing campaigns and air connectivity with these emerging hotspots. Highlighting unique seasonal experiences and improving booking pathways could help convert aspirational demand into actual arrivals.

Air travel bookings to Northern Europe by lead time

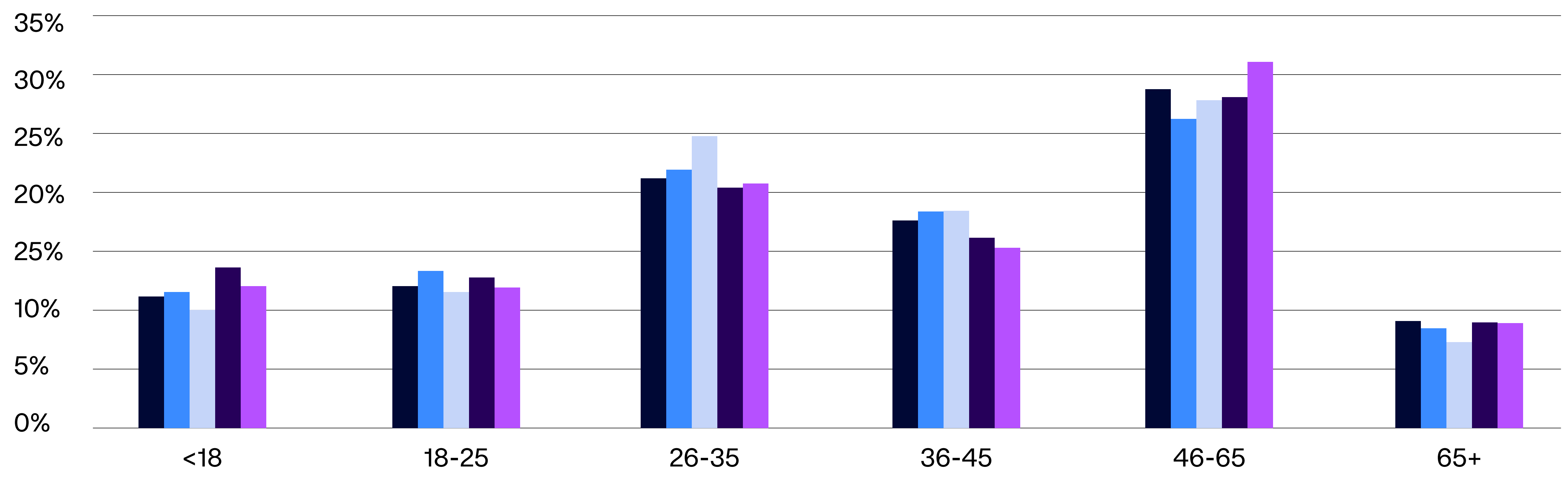


Source: Navigator360™ as of Monday, 5 May 2025

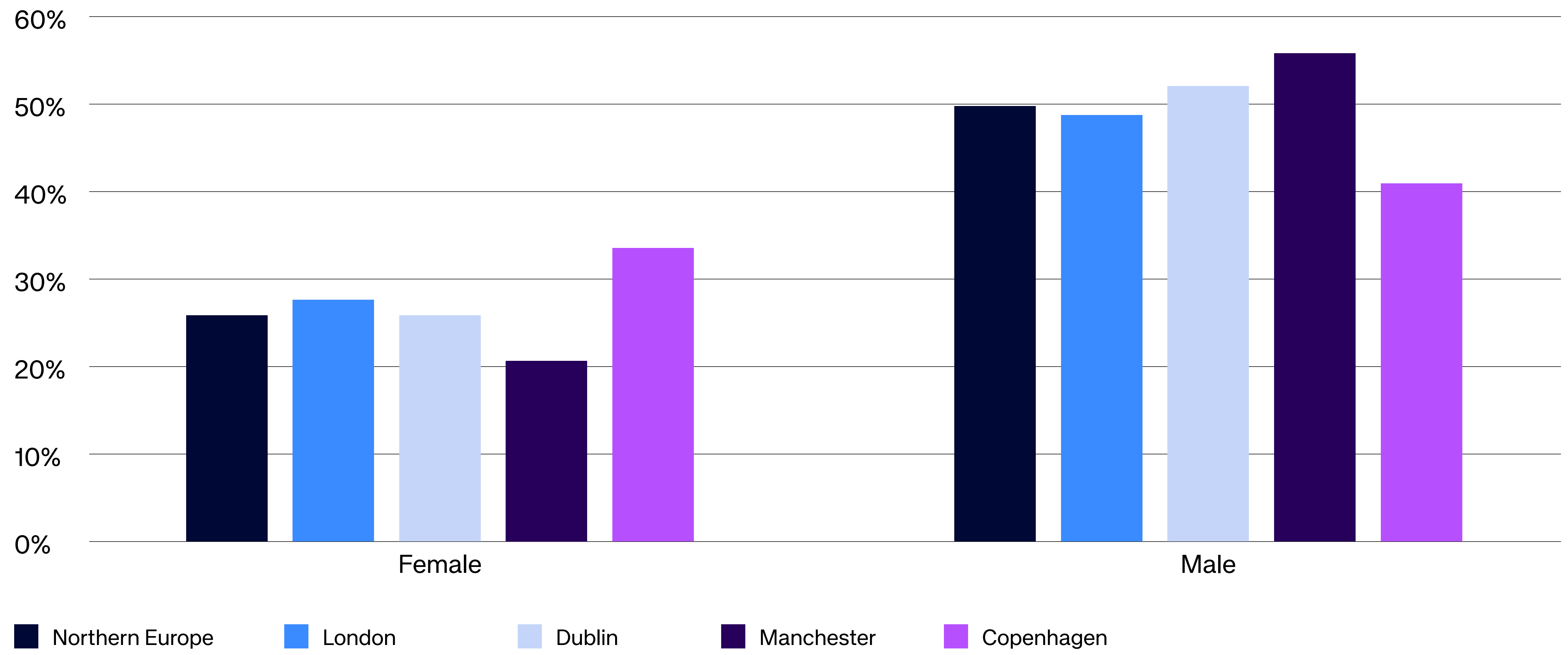


What type of travellers travel to Northern Europe: top destinations

Percentage of passengers booked by age category



Percentage of passengers booked by gender



Source: Navigator360™ as of Sunday, 25 May 2025

Lead time and traveller profile analysis

Travellers are booking well in advance, especially for Northern Europe:
The most common lead time for bookings remains 61–180 days, showing a preference for early planning. This pattern has held steady year-on-year, with a slight increase in bookings made over 6 months in advance (+181 days), indicating growing long-haul or complex travel itineraries.

Northern Europe appeals to older age groups, especially in cities like Manchester and Copenhagen:
Passengers aged 46–65 make up the largest share of bookings overall, particularly in Manchester and Copenhagen where their share exceeds 30%. This suggests these destinations may be especially attractive for mature or retiree travellers.

Recommendation for DMOs:
Capitalise on the long booking windows by launching targeted marketing and conversion campaigns 3–6 months ahead of peak periods.

392 new routes in Northern Europe

Origin market	New routes
Germany	44
France	32
Spain	31
Italy	21
Morocco	16
Greece	15
Türkiye	13
Bulgaria	12
United States	11
United Kingdom	10

Top new international routes (based on seat capacity)

New routes	Origin market	Destination market
ATL-CPH	United States	Denmark
HAK-BOH	China	United Kingdom
DXB-EDI	United Arab Emirates	United Kingdom
URC-BOH	China	United Kingdom
SHA-MAN	China	United Kingdom
GOH-CPH	Greenland	Denmark
PHL-CPH	United States	Denmark
DEN-DUB	United States	Ireland
VIE-BOH	Austria	United Kingdom
STR-MAN	Germany	United Kingdom

Source: Navigator360™ as of Sunday, 25 May 2025

Key insights on new routes to Northern Europe

Germany, France and Spain lead in new route additions to Northern Europe:
Germany alone accounts for 44 new routes, making it the top origin market in terms of air connectivity growth. France and Spain follow closely, suggesting a strategic focus on strengthening intra-European travel links to Northern Europe.

The United States market continues to grow its footprint:
Five of the top new international routes by seat capacity originate from the United States confirming the growing importance of United States-Northern Europe transatlantic connectivity and demand.

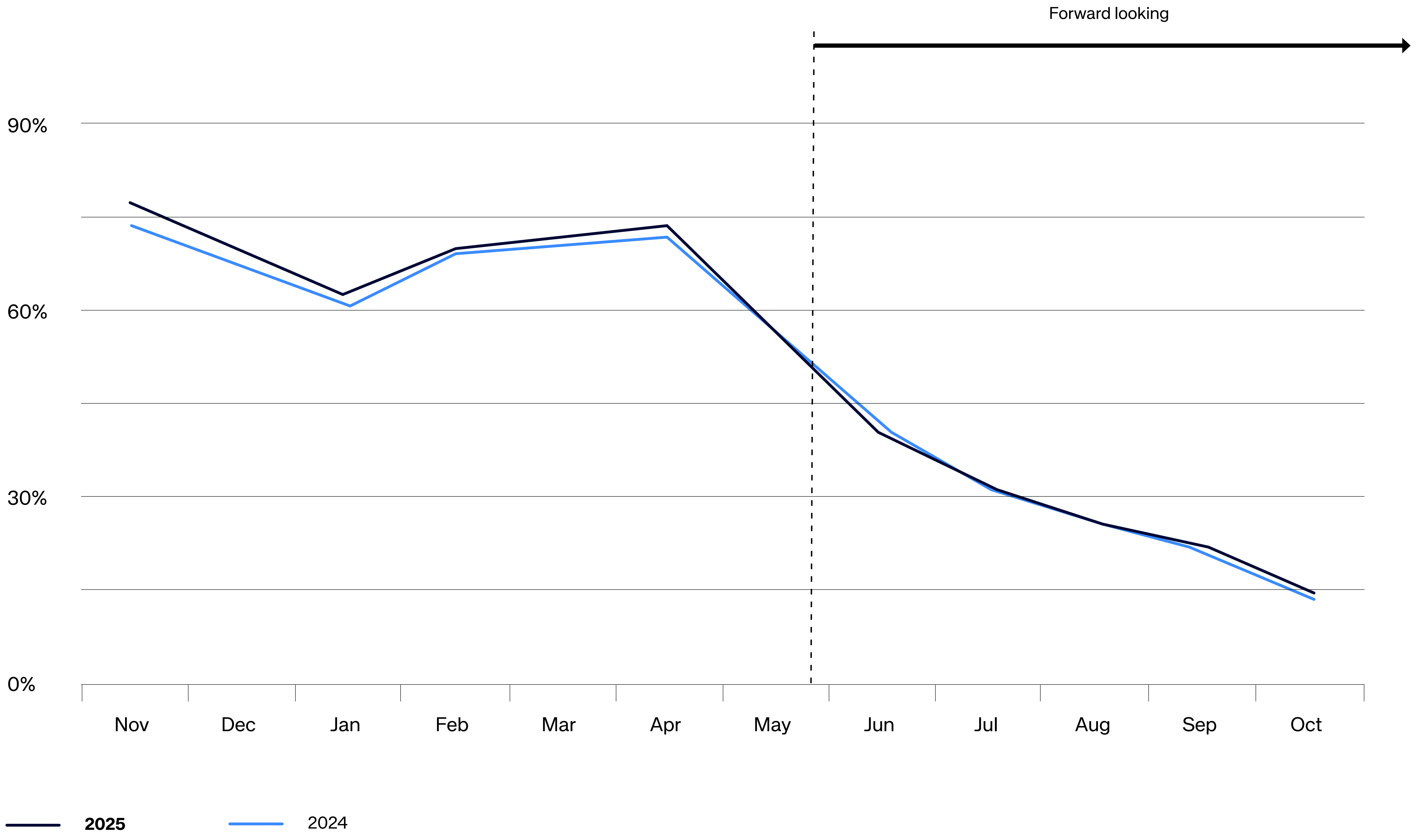
New strategic routes are emerging from Asia and the Middle East:
Notable high-capacity routes such as DXB-EDI (United Arab Emirates to United Kingdom), and SHA-MAN (China to United Kingdom) show a diversification in source markets and further validate the growing interest from long-haul travellers in Asia and the Middle East.

Recommendation for DMOs:
Leverage the launch of these new routes to plan co-marketing campaigns with airlines, targeting both leisure and business travellers in these newly connected markets-particularly the United States, United Arab Emirates, and China. These efforts can boost awareness and accelerate visitor conversion from high-potential, long-haul source region.

Hospitality occupancy overview

Hotel occupancy in Northern Europe

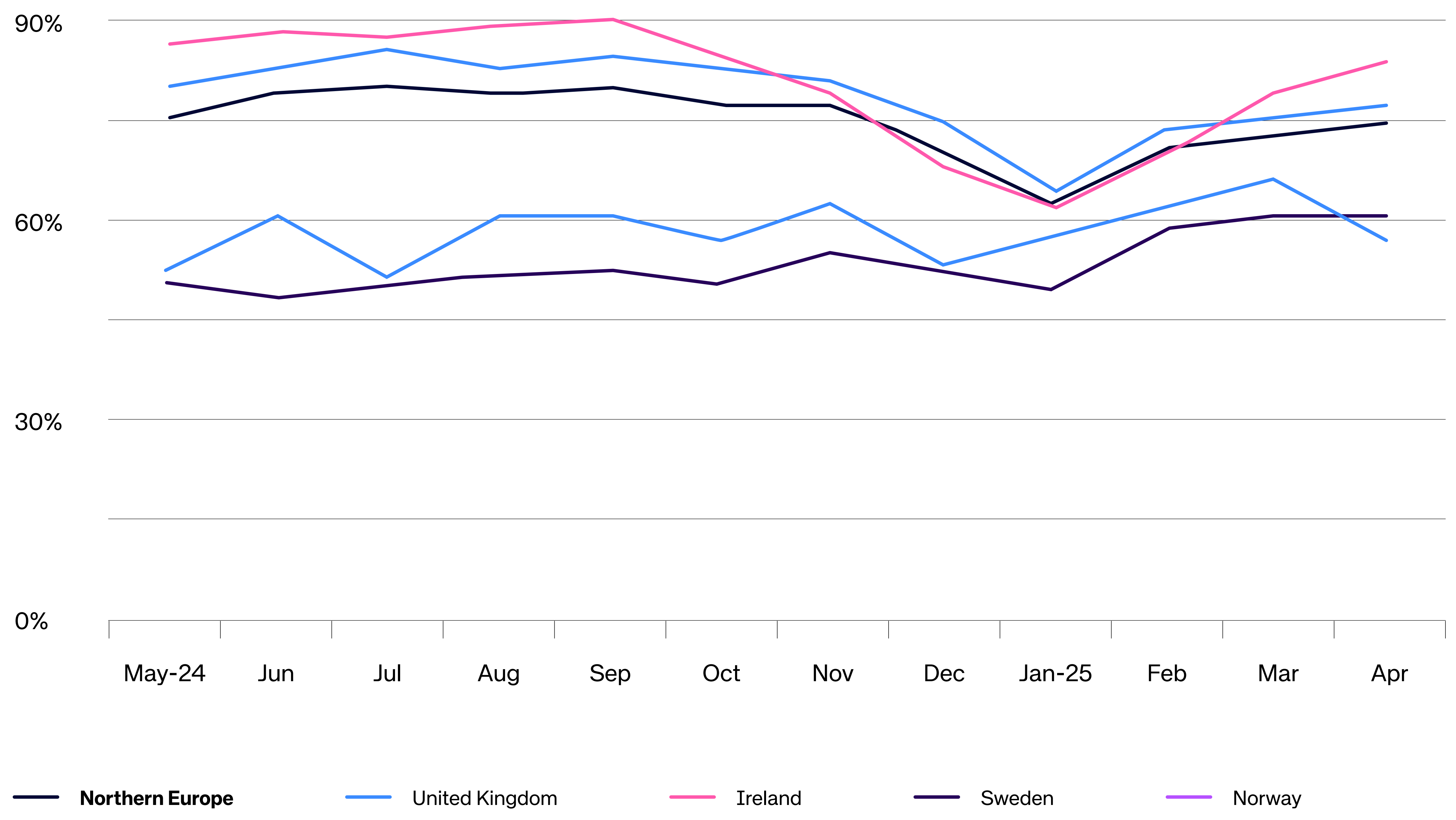
On-the-books by month compared to same month last year (%)



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy for the past 12 months

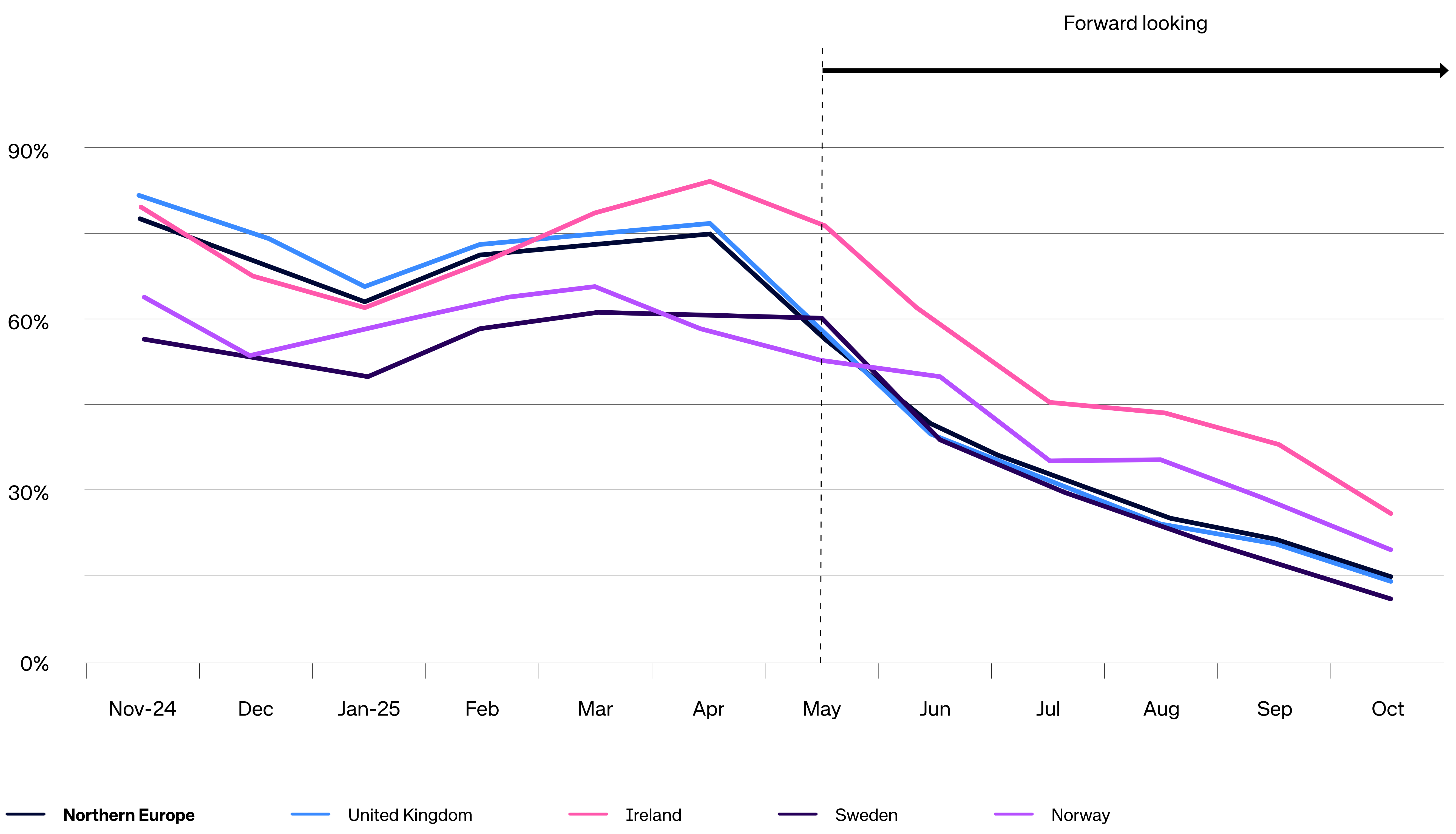
For Northern Europe and its Top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy on-the-books

For Northern Europe and its Top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy analysis

Booking patterns remain aligned, with opportunities to boost summer conversions:
Hotel occupancy in 2025 follows a similar trend to 2024 through spring, suggesting stable early-year performance. While forward-looking bookings for summer are currently pacing behind last year, this presents a timely opportunity for targeted campaigns to drive late-stage conversions and capture demand.

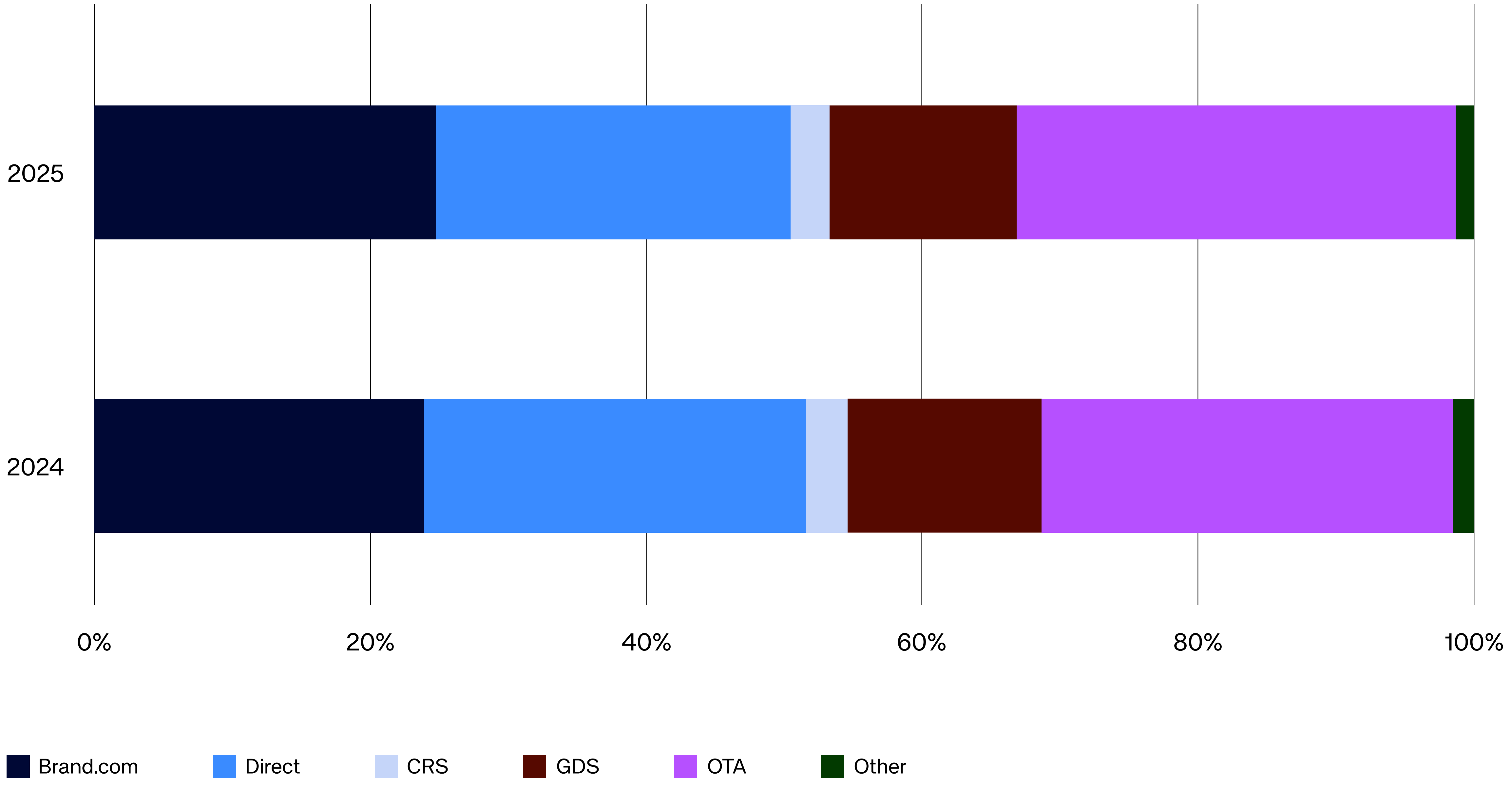
Ireland is the regional standout in occupancy recovery:
In the country breakdown, Ireland leads all markets with the highest hotel occupancy both historically and in forward-looking data. This suggests stronger demand and potentially more resilient domestic or inbound segments compared to peers like Sweden or Norway.

Regional compression seen in summer months:
All top markets (United Kingdom, Ireland, Sweden, Norway) and the Northern Europe aggregate show a notable drop in bookings after April, reaching levels below 40% by July and declining further. This aligns with a potential gap in summer tourism planning or promotional activity.

Recommendation for DMOs:
Double down on mid- and late-summer promotional efforts, especially for July-October, where occupancy is trending significantly below last year. Leverage Ireland's performance to identify success factors (e.g. event calendars, air connectivity, pricing) and apply those learnings across other Northern European markets.

Hotel channel mix in Northern Europe

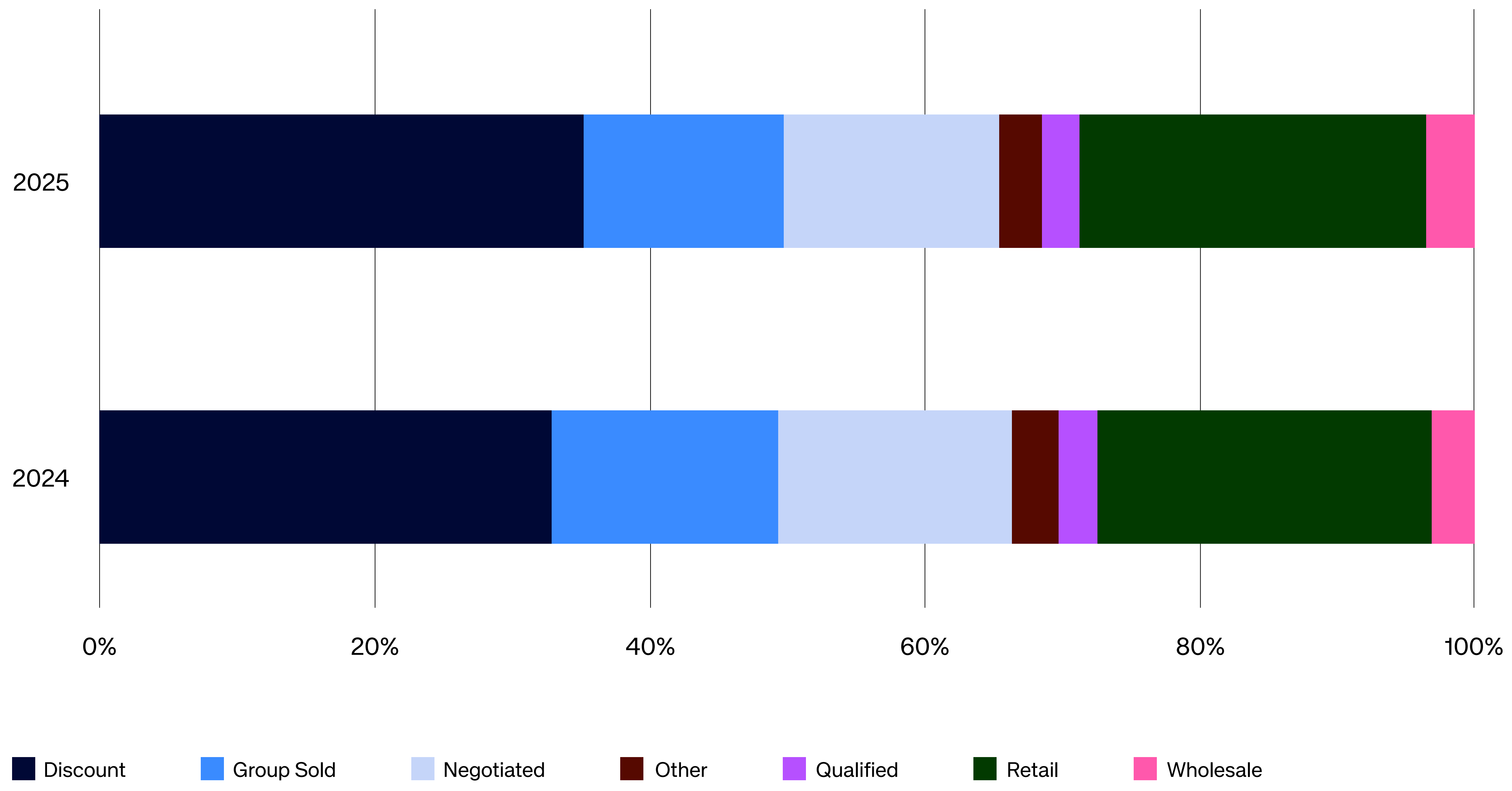
On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Monday, 5 May 2025

Hotel segmentation in Northern Europe

On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Monday, 5 May 2025

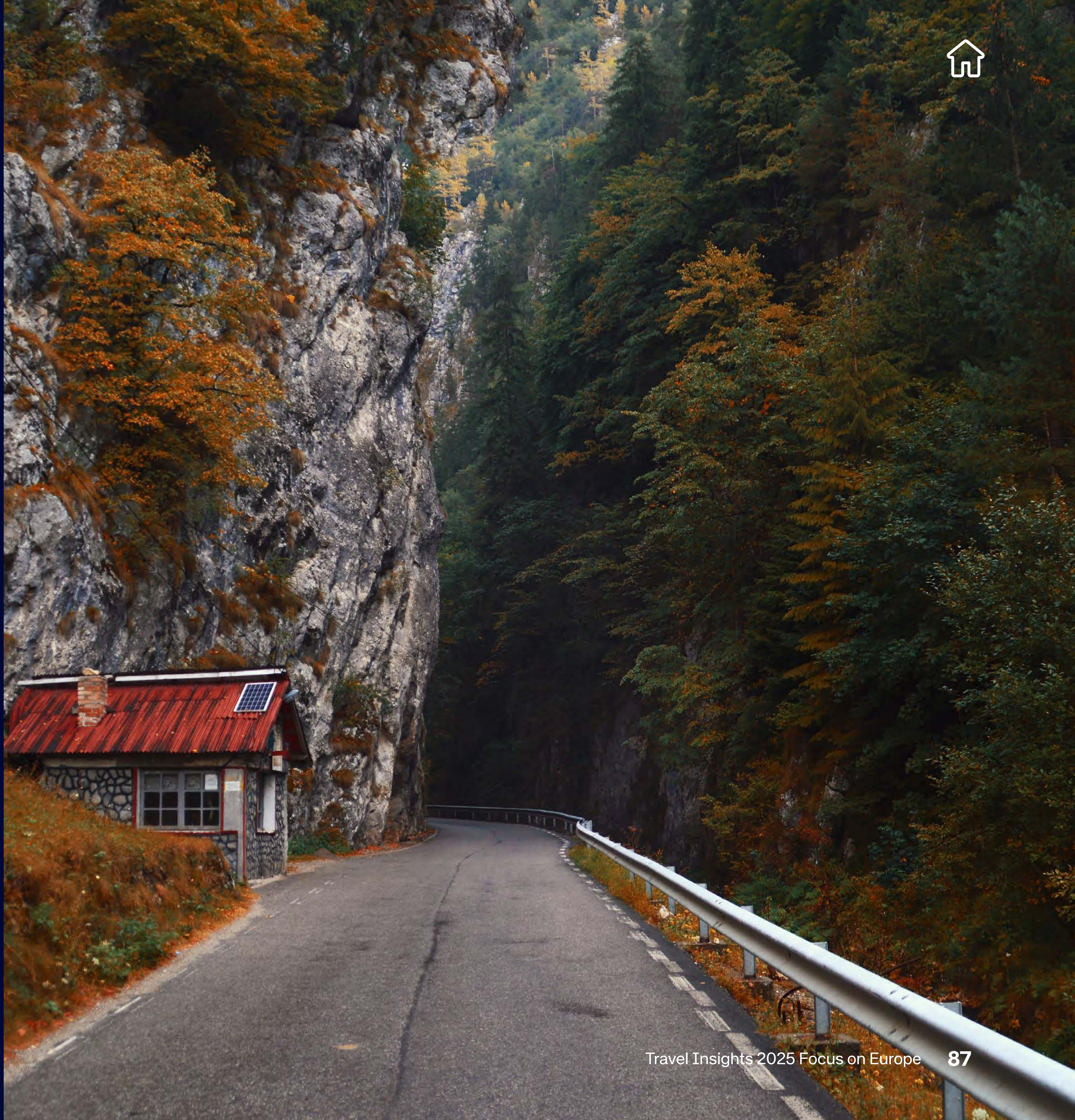
Hotel segmentation and channel analysis in Northern Europe

Stable channel mix with strong direct and OTA presence:
The overall channel mix in Northern Europe has remained consistent year-over-year, with Direct and OTA channels continuing to dominate. This reflects ongoing consumer confidence in both direct booking options and third-party platforms.

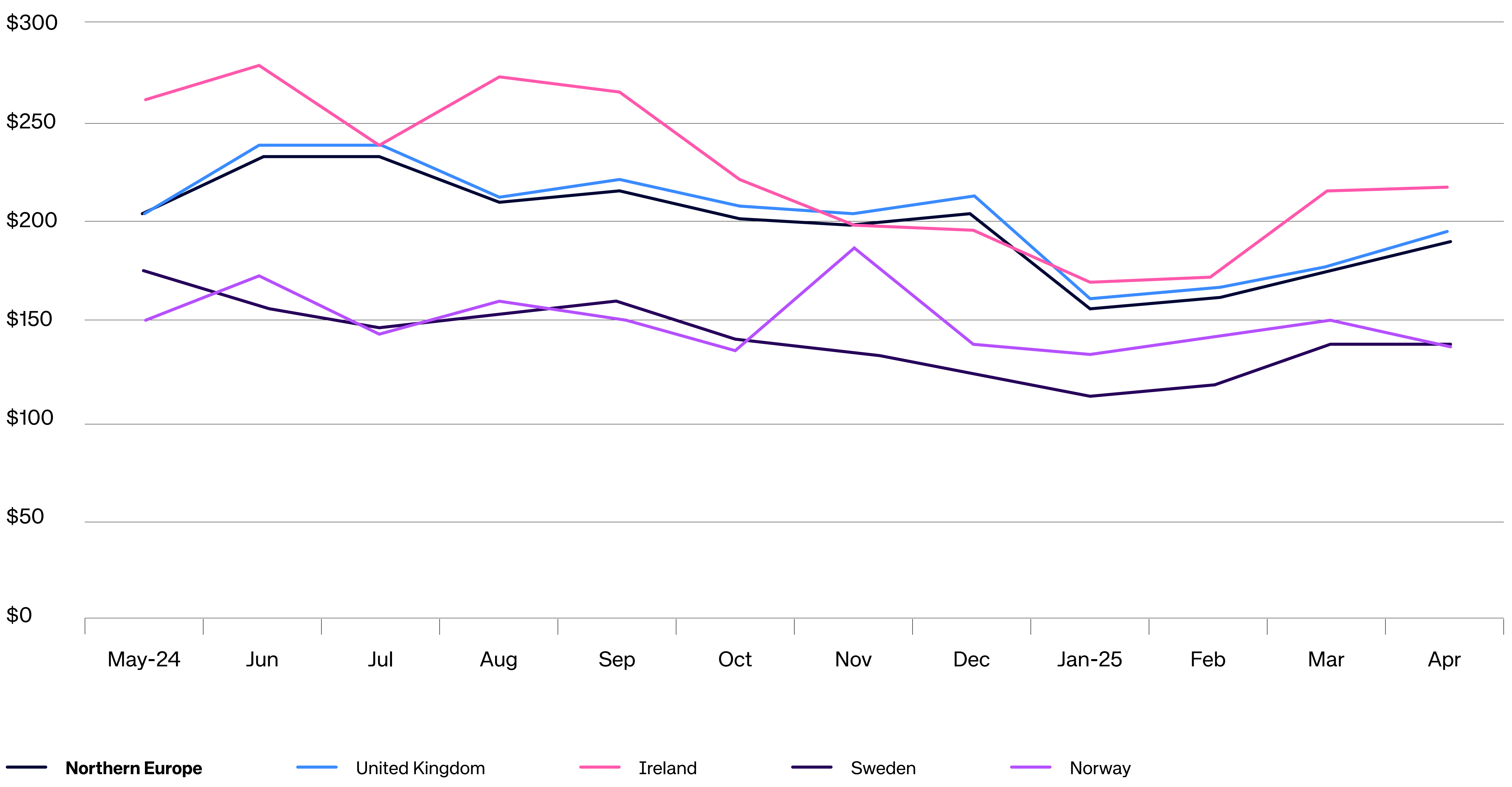
Brand.com gains slight traction:
There is a subtle uptick in brand.com bookings in 2025, suggesting that some travellers are turning to hotel-branded sites, possibly influenced by loyalty programs or targeted offers.

Discount and group segments strengthen:
On the segmentation side, discount and group sold segments have slightly increased, which may reflect continued interest from price-sensitive travellers and organised group travel-possibly business or events related demand recovery.

Recommendation for DMOs:
To sustain growth and diversify demand, consider tailoring packages for both direct and group channels-especially combining attractive price points with loyalty incentives. Reinforcing brand presence through direct channels can help mitigate OTA dependency and drive higher-margin bookings.



Average daily rate (ADR) in USD



Source: Navigator360™ as ofMonday, 5 May 2025

Hotel ADR analysis in Northern Europe

Ireland maintains premium positioning:
Ireland consistently records the highest ADR among Northern Europe's top markets, often surpassing $250, indicating strong pricing power and likely demand for higher-end or limited-supply accommodations.

Northern Europe and the United Kingdom show stability:
ADR in Northern Europe overall-and in the United Kingdom specifically-remains relatively stable throughout the year, hovering between $190-$230. This suggests well-managed rate strategies that may be cushioning against seasonal dips.

Sweden and Norway remain price-competitive:
Sweden and Norway have the lowest ADR levels in the region, often below $160. This price positioning may appeal to budget-conscious travellers but also suggests opportunity for yield optimisation, particularly during peak travel months.

Recommendation for DMOs:
Focus on value-driven messaging for lower-ADR markets like Sweden and Norway to convert aspirational travel interest into bookings. Simultaneously, benchmark Ireland and the United Kingdom as premium case studies-identify what drives their strong rates (events, experiences, business travel) and explore how similar factors can be leveraged across other destinations.

Northern Europe destinations included in this analysis

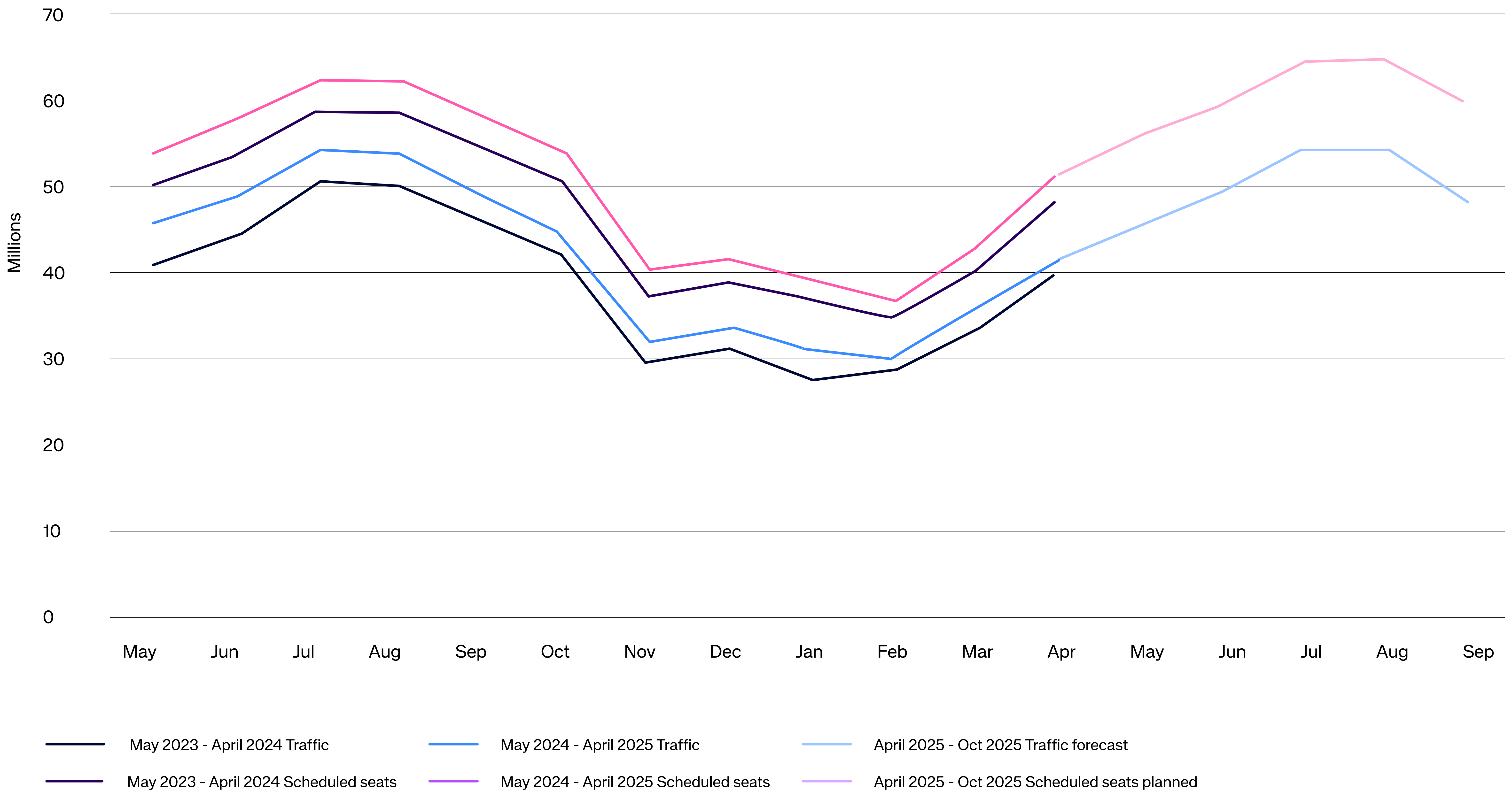
Destination market	Sub region
Denmark	Northern Europe
Finland	Northern Europe
Iceland	Northern Europe
Ireland	Northern Europe
Norway	Northern Europe
Sweden	Northern Europe
United Kingdom	Northern Europe

Europe - Southern and Mediterranean Europe

Air travel overview

Worldwide to Southern and Mediterranean Europe

Air passenger volume and scheduled seats



Source: Navigator360™ as of Sunday, 11 May 2025

7.7% growth

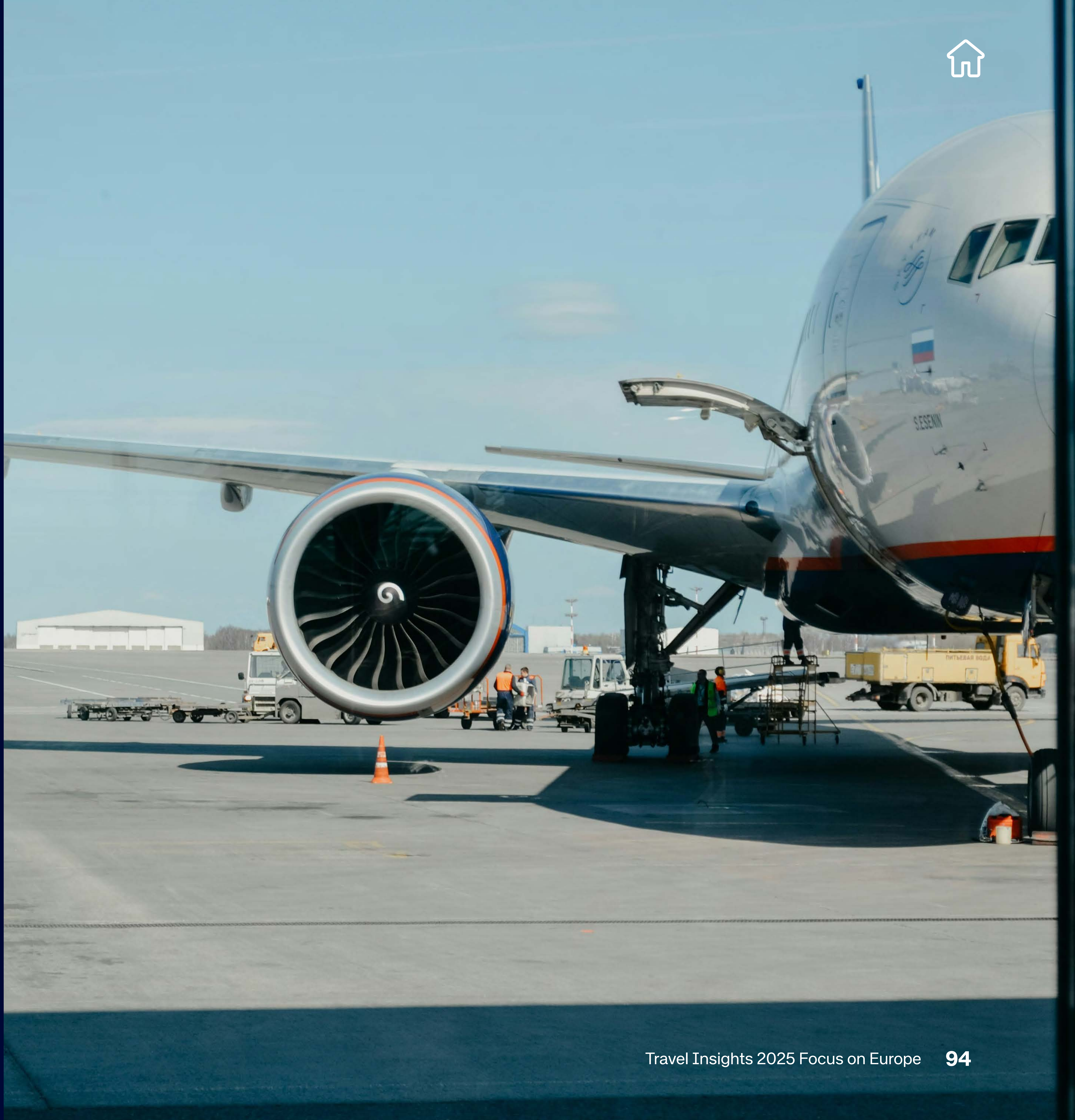
Passenger traffic and capacity analysis

Sustained growth momentum in travel demand:
Passenger traffic to Southern and Mediterranean Europe continues on an upward trajectory, with an 7.7% year-over-year increase, reflecting strong global demand and reinforcing the region's appeal as a top leisure destination.

Capacity expansion signals market confidence:
Scheduled seat capacity outpaces traffic growth, particularly from May onward, indicating airlines are proactively investing in additional routes and frequencies in anticipation of peak summer demand.

Clear seasonal travel pattern:
Travel volume follows a distinct seasonal curve with summer peaks and winter troughs-emphasising the importance of strategic pricing, staffing, and promotions aligned with these demand cycles.

Recommendation for DMOs:
Capitalise on the strong summer forecast by amplifying promotional campaigns in key source markets now, particularly those with new or expanded air connectivity. Additionally, use the lower off-season months to diversify offerings (e.g. wellness, cultural events, remote work packages) and attract new segments to smooth demand year-round.



Where do visitors go? Reality vs. aspirations

Top origin markets searching for travel
to Southern and Mediterranean Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Germany	1	1
United Kingdom	2	2
Italy	4	3
United States	5	4
Spain	3	5
France	6	6
Brazil	7	7
Poland	10	8
Netherlands	8	9
Türkiye	11	10

Top origin markets travelling
to Southern and Mediterranean Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Spain	1	1
United States	2	2
Italy	3	3
Germany	4	4
France	5	5
Portugal	6	6
United Kingdom	7	7
Brazil	8	8
Greece	11	9
Canada	10	10

Source: Navigator360™ as of Sunday, 25 May 2025

Are travellers from these markets to Southern and Mediterranean Europe already on your radar?

Top origin markets searching for travel to Southern and Mediterranean Europe with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
China	1	218%
Saudi Arabia	2	39%
Korea (ROK)	3	33%
Poland	4	32%
India	5	31%
Hungary	6	28%
Norway	7	21%
Germany	8	17%
Argentina	9	17%
Switzerland	10	16%

Top origin markets travelling to Southern and Mediterranean Europe with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Poland	1	12%
Korea (ROK)	2	11%
Denmark	3	11%
Egypt	4	8%
Sweden	5	6%
Portugal	6	3%
Italy	7	2%
India	8	2%
Norway	9	1%

Source: Navigator360™ as of Monday, 5 May 2025

Who is searching and visiting Southern and Mediterranean Europe analysis

Strong interest from Central European markets is converting well:
Germany, Italy, and the United Kingdom consistently rank in the top origin markets for both searches and arrivals, showing stable demand and effective conversion into actual visits.

Emerging growth from Eastern and Asian markets:
Countries like China (+218%), Korea (ROK) (+33%), and Saudi Arabia (39%) are seeing rapid growth in search interest, with some already improving in arrivals-such as Korea (ROK)-indicating rising outbound travel momentum toward Southern Europe.

Recommendation for DMOs:
Invest in tailored outreach and conversion strategies in fast-growing aspirational markets like China, Korea (ROK), India and Saudi Arabia. These efforts could include localised campaigns, multilingual content, and partnerships with OTAs or airlines to ease the path to booking and turn search interest into confirmed travel.

Where do visitors go? Reality vs. aspirations

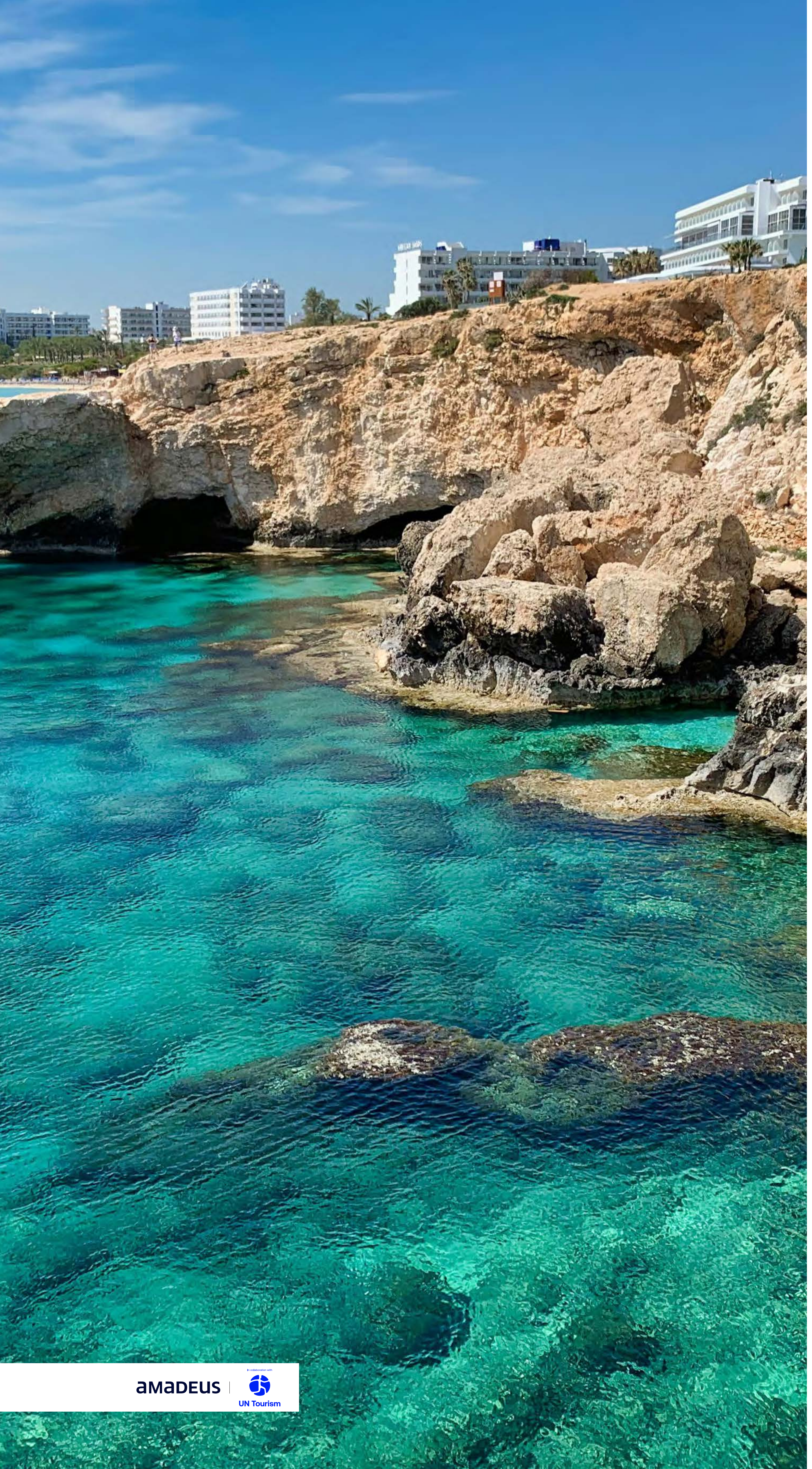
Top searched destinations in
Southern and Mediterranean Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Spain	1	1
Italy	2	2
Türkiye	3	3
Greece	4	4
Portugal	5	5
Croatia	7	6
Cyprus	8	7
Israel	6	8
Malta	9	9
Albania	10	10

Top booked destinations in
Southern and Mediterranean Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Spain	1	1
Italy	2	2
Türkiye	3	3
Portugal	4	4
Greece	5	5
Israel	6	6
Croatia	7	7
Malta	8	8
Cyprus	10	9
Serbia	9	10

Source: Navigator360™ as of Monday, 5 May 2025



Top performing destinations in Southern and Mediterranean Europe

Top searched destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Albania	1	30%
Serbia	2	23%
Slovenia	3	21%
Malta	4	21%
Bosnia and Herzegovina	5	20%
Montenegro	6	16%
Italy	7	15%
Croatia	8	14%
Greece	9	11%
Portugal	10	9%

Top booked destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Albania	1	3%
Croatia	2	3%
Greece	3	1%
Italy	4	1%
Montenegro	5	0%
Spain	6	0%
Portugal	7	0%
Cyprus	8	-1%
Slovenia	9	-3%
Malta	10	-6%

Source: Navigator360™ as of Monday, 5 May 2025

Where are travellers going in Southern and Mediterranean Europe

Albania and Serbia are gaining strong aspirational momentum:
Albania (+30%) and Serbia (+23%) are the top two fastest growing destinations in terms of searches, suggesting a rising interest in less traditional destinations. Both countries also remain stable in booking rankings, indicating early signs of growing competitiveness.

Established destinations maintain strong booking presence:
Spain and Italy continue to hold the top three booking positions, with Italy also registering search and booking growth (+15%), reflecting steady demand and reliable market conversion.

Recommendation for DMOs:
Capitalise on the growing interest in emerging destinations like Albania, Serbia, and Slovenia by improving the booking infrastructure and traveller readiness-through enhanced online presence, partnerships with OTAs, and targeted marketing-helping convert rising search volumes into actual stays.

Where do visitors go? Reality vs. aspirations

Top searched destinations in
Southern and Mediterranean Europe

Destination cities	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
Istanbul (TR)	1	1
Rome (IT)	2	2
Madrid (ES)	4	3
Barcelona (ES)	3	4
Milan (IT)	5	5
Lisbon (PT)	6	6
Athens (GR)	7	7
Palma (ES)	8	8
Malaga (ES)	9	9
Santa Cruz De Tenerife (ES)	11	10

Top booked destinations in
Southern and Mediterranean Europe

Destination cities	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking	May 24 - Apr 25 vs May 23 - Apr 24
Istanbul (TR)	1	1	-19%
Madrid (ES)	2	2	-1%
Rome (IT)	3	3	-1%
Barcelona (ES)	4	4	-2%
Milan (IT)	5	5	0%
Lisbon (PT)	6	6	-2%
Athens (GR)	7	7	1%
Tel Aviv (IL)	8	8	-24%
Venice (IT)	9	9	4%
Palma (ES)	12	10	10%

Source: Navigator360™ as of Sunday, 25 May 2025

Top performing destinations in Southern and Mediterranean Europe

Top searched destinations with the highest growth
(among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Tirana (AL)	1	31%
Belgrade (RS)	2	25%
Funchal (PT)	3	24%
Milan (IT)	4	20%
Luqa (MT)	5	20%
Rome (IT)	6	19%
Madrid (ES)	7	17%
Athens (GR)	8	16%
Istanbul (TR)	9	15%
Florence (IT)	10	15%

Top booked destinations with the highest growth
(among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Alicante (ES)	1	15%
Ponta Delgada (PT)	2	10%
Palma (ES)	3	10%
Palermo (IT)	4	6%
Santa Cruz De Tenerife (ES)	5	6%
Venice (IT)	6	4%
Zagreb (HR)	7	4%
Split (HR)	8	3%
Las Palmas De Gran Canaria (ES)	9	3%
Athens (GR)	10	1%

Source: Navigator360™ as of Sunday, 25 May 2025

Which cities are travellers visiting in Southern and Mediterranean Europe

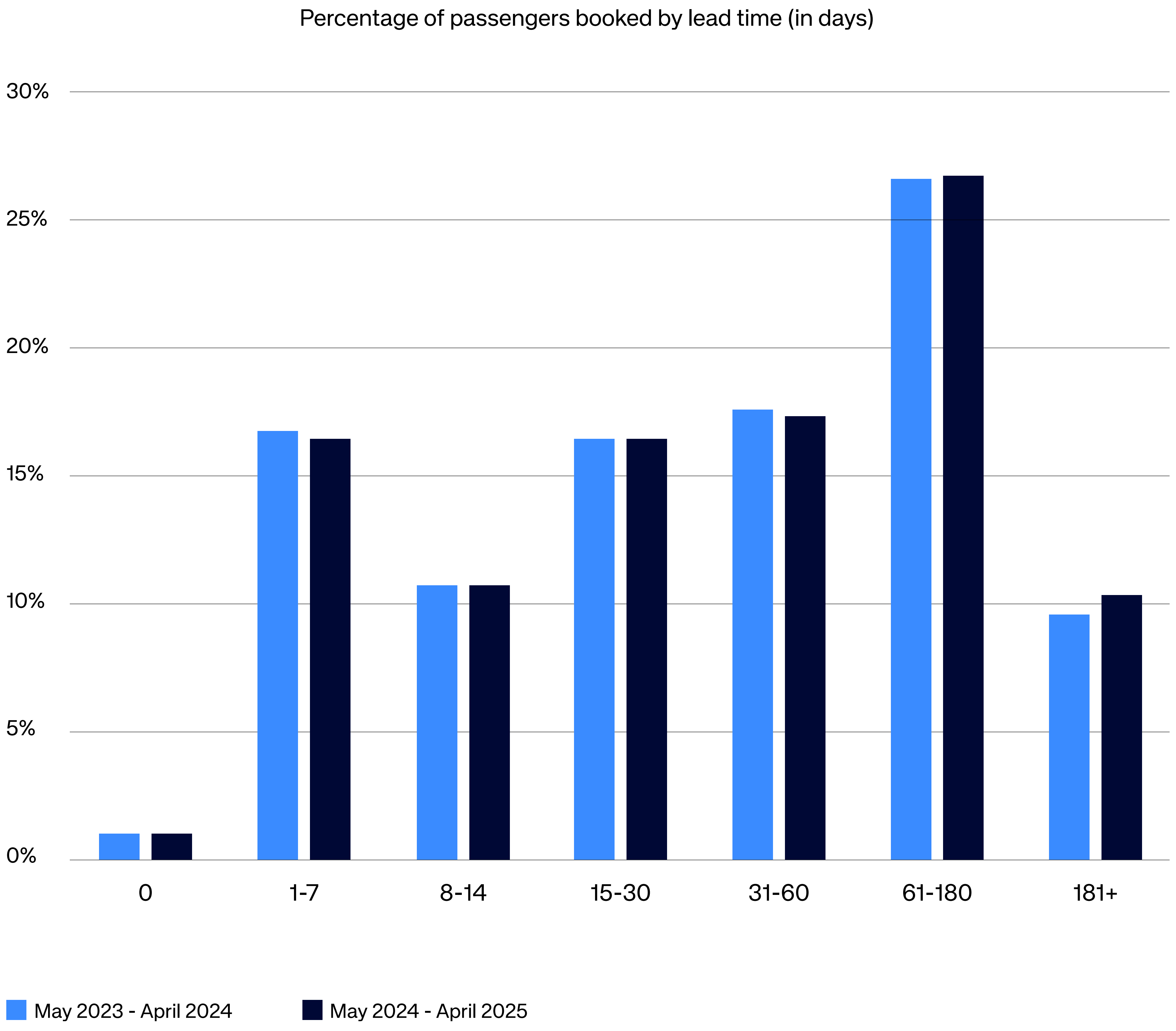
High aspirational interest matches booking reality:
Rome, Madrid and Istanbul remain top-of-mind and top-of-booked destinations, ranking in the top 2 across both searches and bookings consistently. This alignment indicates strong brand equity and reliable conversion for these cities.

Emerging destinations gaining visibility in search:
Cities like Tirana (Albania), Belgrade (Serbia), and Funchal (Portugal) are experiencing substantial growth in search interest-with year-on-year increases between 24-31%-but are not yet reflected in the top booked destinations. This gap signals strong future potential.

Diverse booking growth beyond traditional hubs:
Cities like Alicante, Palma, and Ponta Delgada are among the top 10 fastest-growing booked destinations. This highlights a dispersion of demand from traditional capitals to regional or leisure-focused hubs.

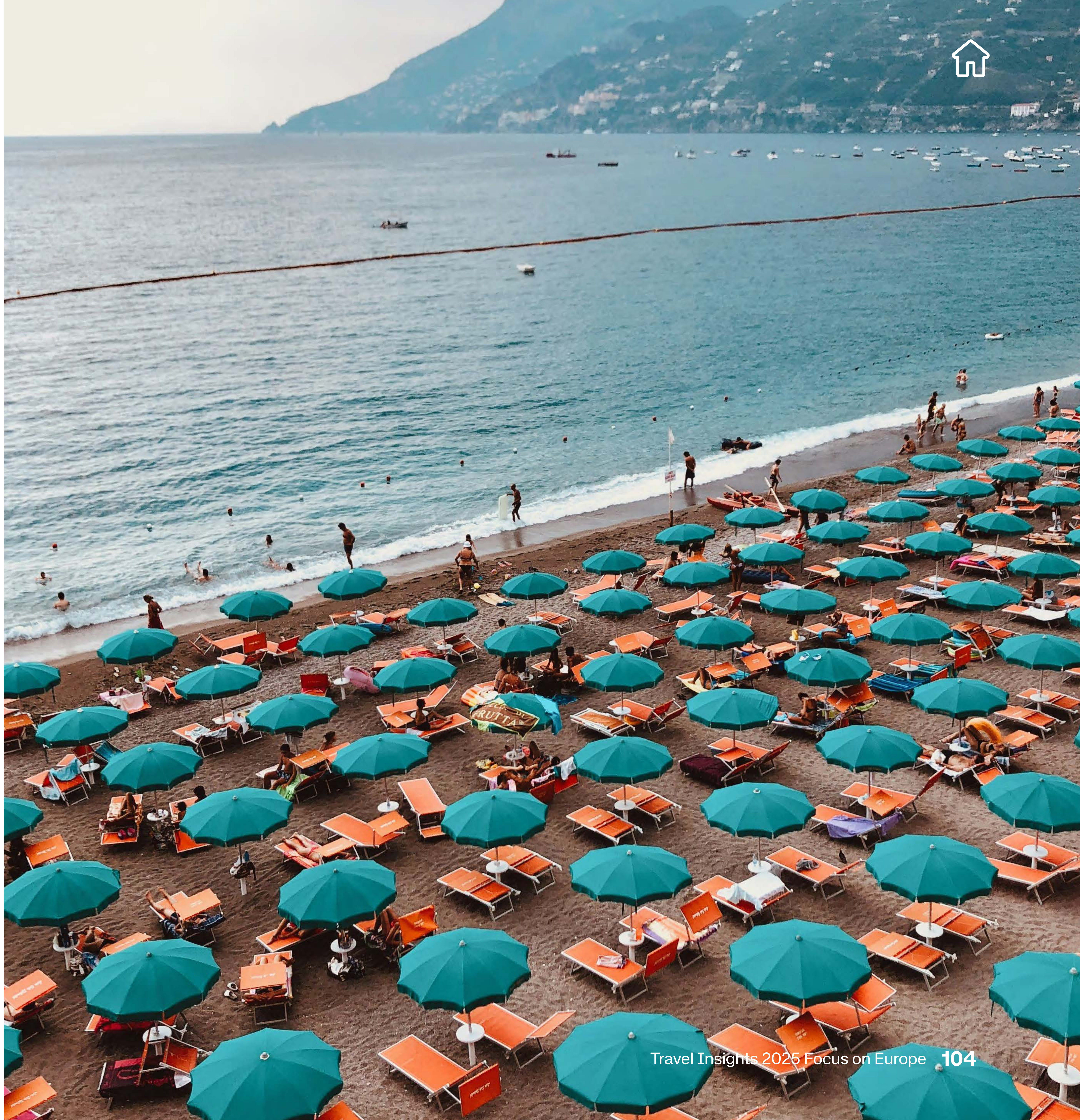
Recommendation for DMOs:
Capitalise on rising aspirational interest in lesser-known cities (e.g. Tirana, Belgrade, Funchal) by launching targeted promotional campaigns and ensuring seamless booking options. Simultaneously, support continued demand to secondary high-performing hubs by enhancing air connectivity and local tourism offerings.

Air travel bookings to Southern and Mediterranean Europe by lead time

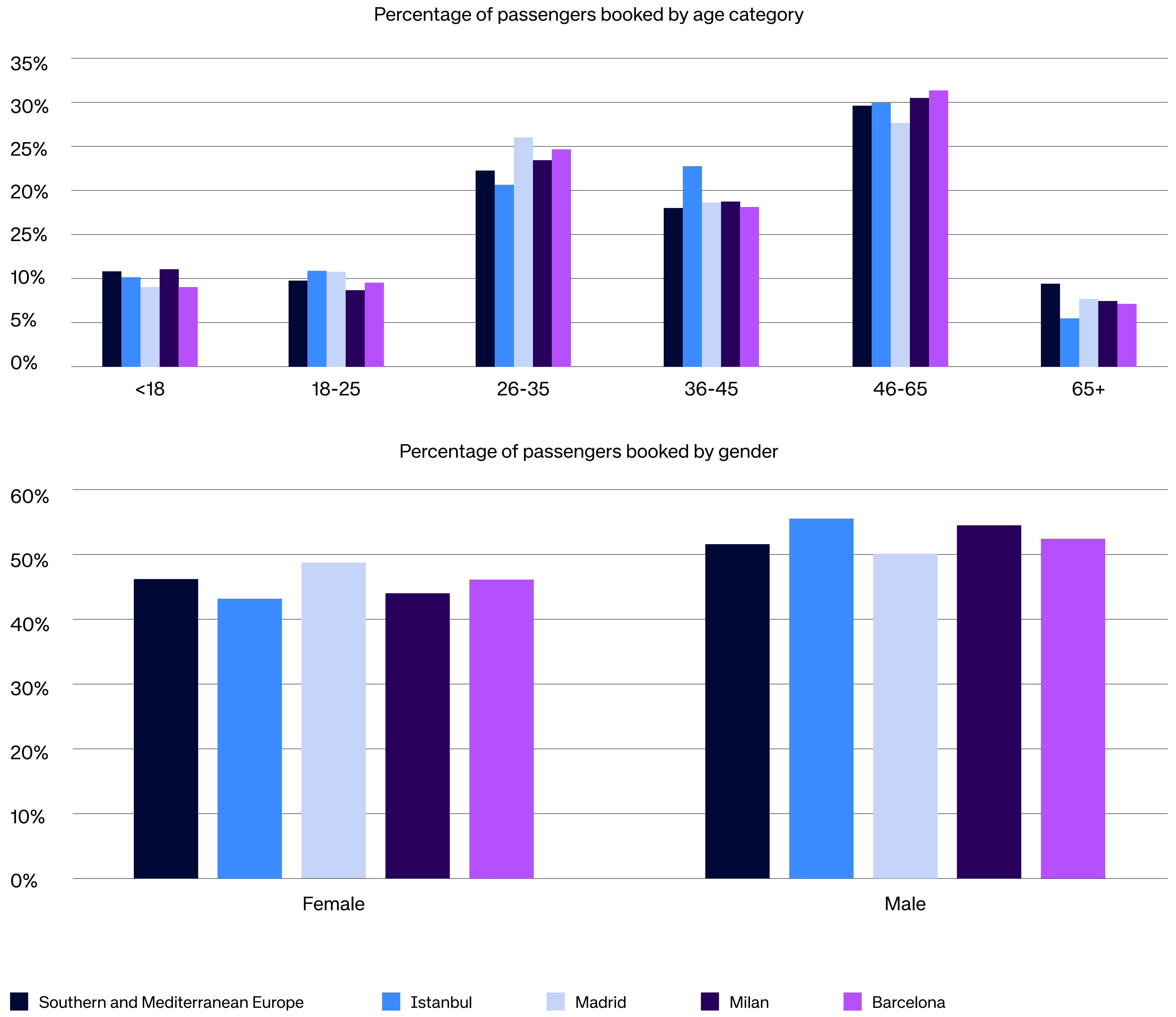


Source: Navigator360™ as of Monday, 5 May 2025

amadeus | UN Tourism



What type of travellers travel to Southern and Mediterranean Europe: top destinations



Source: Navigator360™ as of Sunday, 25 May 2025

Lead time and traveller profile analysis

Strong advance booking behaviour sustained:
Over 44% of passengers book their trips to Southern and Mediterranean Europe more than 60 days in advance, maintaining consistent behaviour year over year-an opportunity to activate campaigns well ahead of peak seasons.

Older and mid-age travellers dominate demand:
Travellers aged 46–65 represent the largest booking segment across the region. This group outpaces younger demographics, indicating a more mature audience with greater travel intent and spending power.

Recommendation for DMOs:
Consider launching early, demographically targeted campaigns tailored to high-value mid-age travellers-especially for cities with longer booking lead times like Milan and Istanbul. Highlight premium experiences, cultural depth, and ease of planning well in advance to convert this audience earlier in the journey.

931 new routes in Southern and Mediterranean Europe

Origin market	New routes
Germany	121
Czech Republic	66
France	52
Italy	42
Spain	37
United Kingdom	35
Poland	34
Romania	33
Morocco	29
Egypt	26

Top new international routes (based on seat capacity)

New routes	Origin market	Destination market
ECN-QIN	Cyprus	Türkiye
QIN-ECN	Türkiye	Cyprus
BKK-MIL	Thailand	Italy
DOH-VCE	Qatar	Italy
DOH-LIS	Qatar	Portugal
DEN-IST	United States	Türkiye
TRN-IST	Italy	Türkiye
IST-TRN	Türkiye	Italy
KWE-MIL	China	Italy
CHI-VCE	United States	Italy

Source: Navigator360™ as of Sunday, 11 May 2025

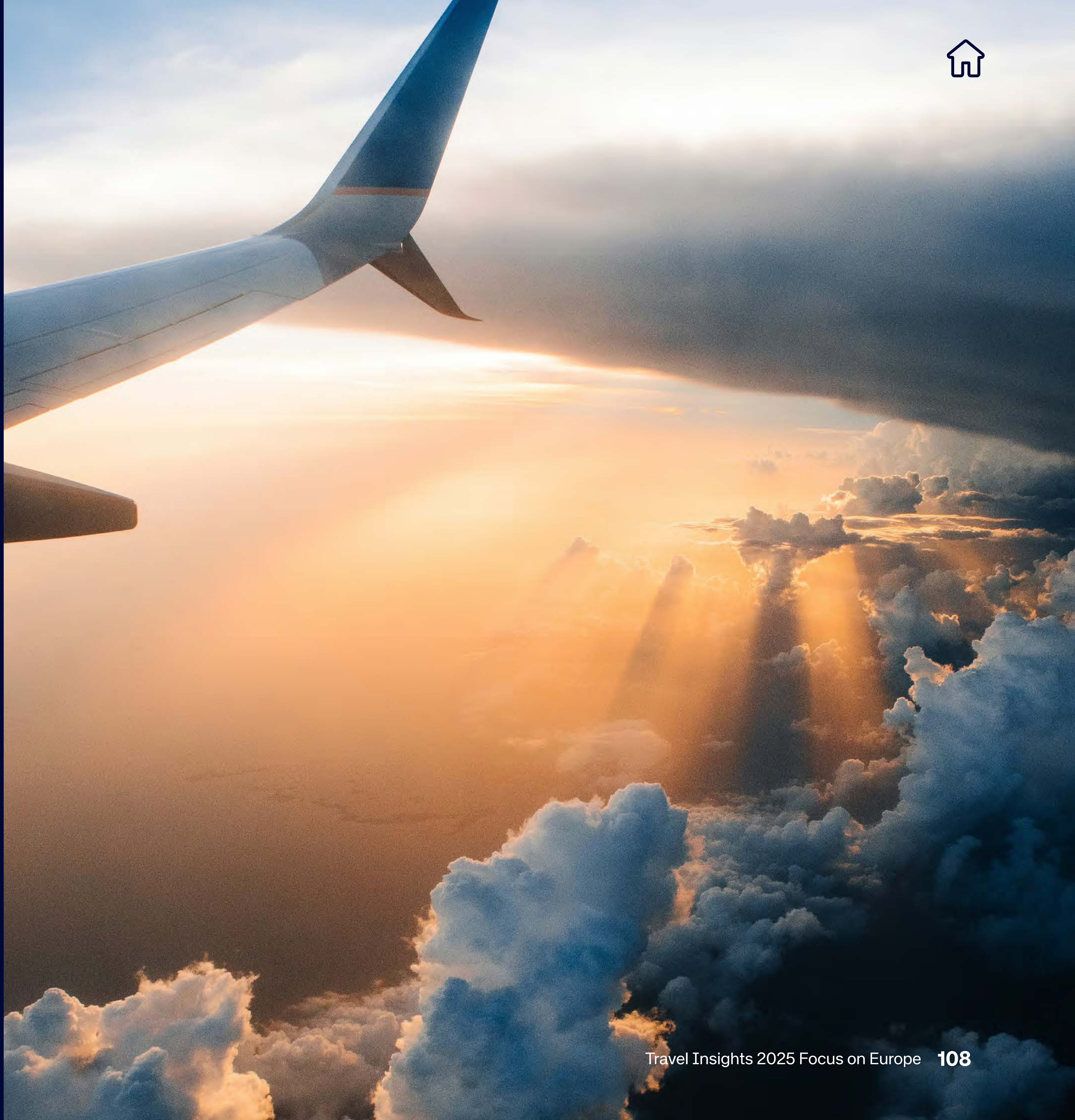
New routes analysis in Southern and Mediterranean Europe

Germany drives connectivity growth:
Germany leads with 121 new routes to Southern and Mediterranean Europe, significantly ahead of all other origin countries. This suggests strong outbound travel demand and potential for deepening partnerships with German carriers and tour operators.

Italy and Türkiye as strategic hubs:
Italy and Türkiye are key beneficiaries of the top new international routes by seat capacity-highlighting their role as strategic air travel gateways in the region.

Emerging long-haul links fuel access:
Several high-capacity new routes originate from long-haul markets like Thailand, Qatar, China and the United States. This reflects growing intercontinental interest and opens the door for DMOs to attract long-stay or high-value travellers.

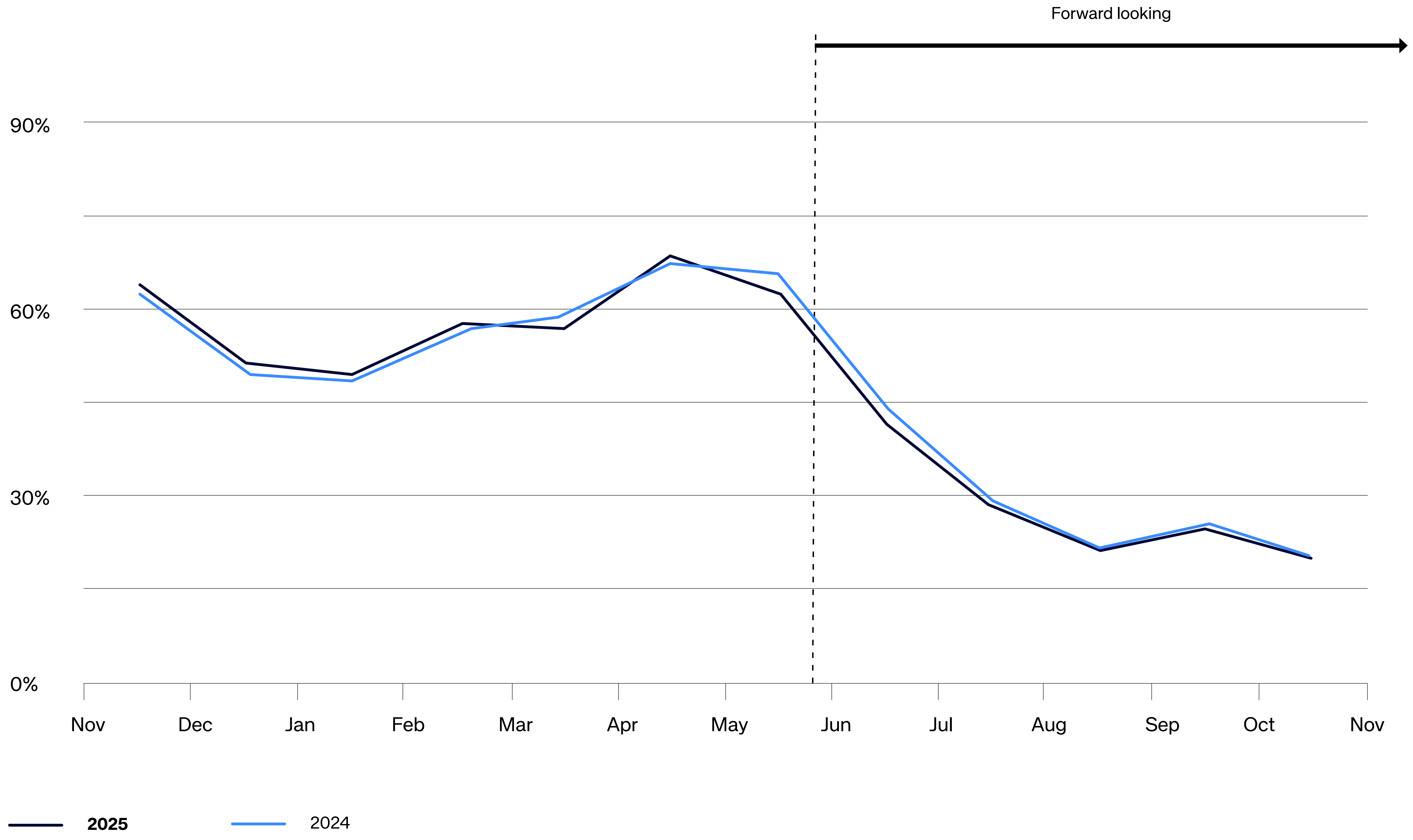
Recommendation for DMOs:
Capitalise on the surge in air connectivity by launching coordinated marketing efforts in top origin countries-particularly Germany, the United States, and Asia-emphasising ease of access, unique seasonal experiences, and premium offerings in cities like Milan, Venice and Istanbul.



Hospitality occupancy overview

Hotel occupancy in Southern/ Mediterranean Europe

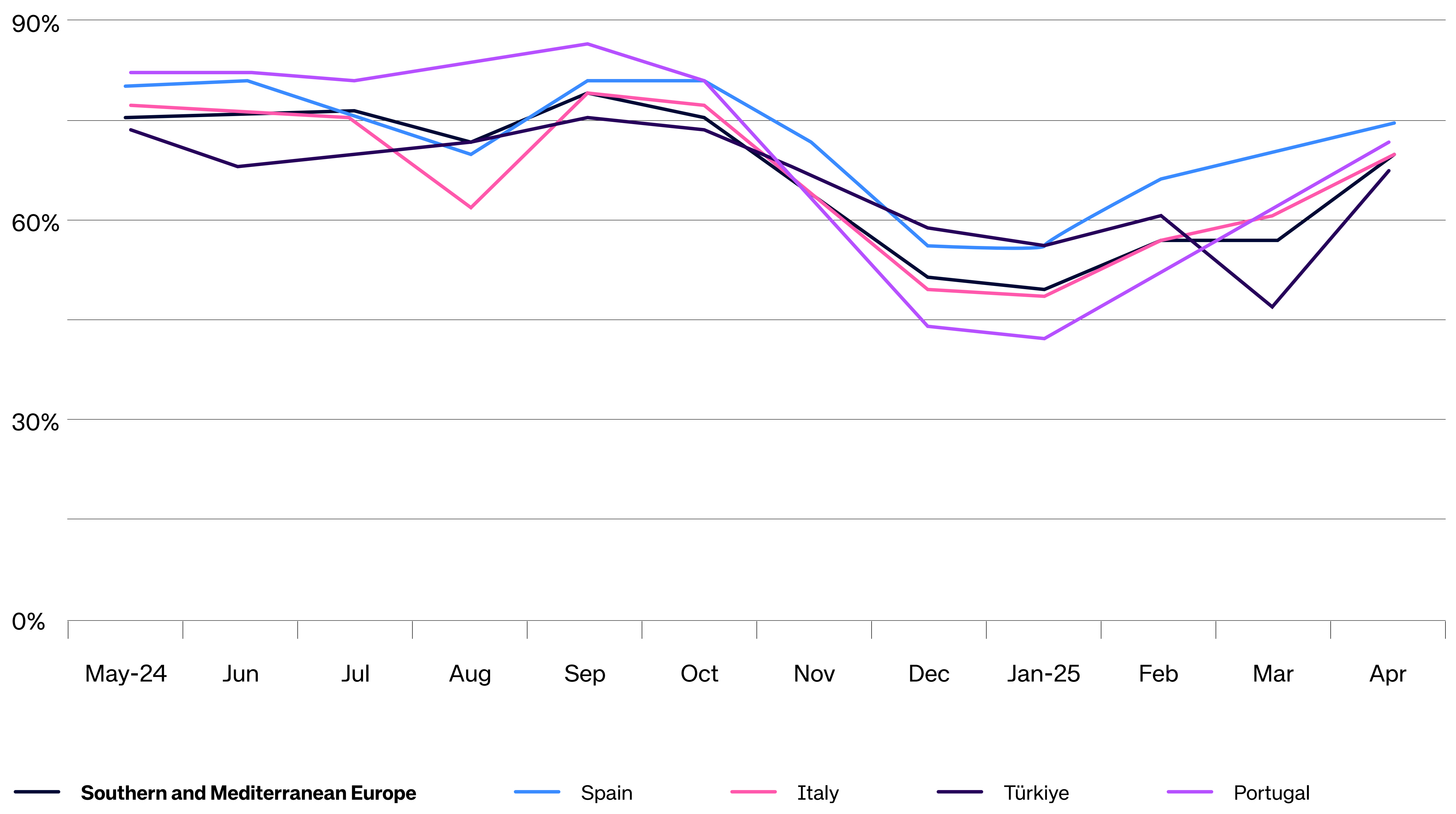
On-the-books by month compared to same month last year (%)



Source: Navigator360™ as of Sunday, 11 May 2025

Hotel occupancy for the past 12 months

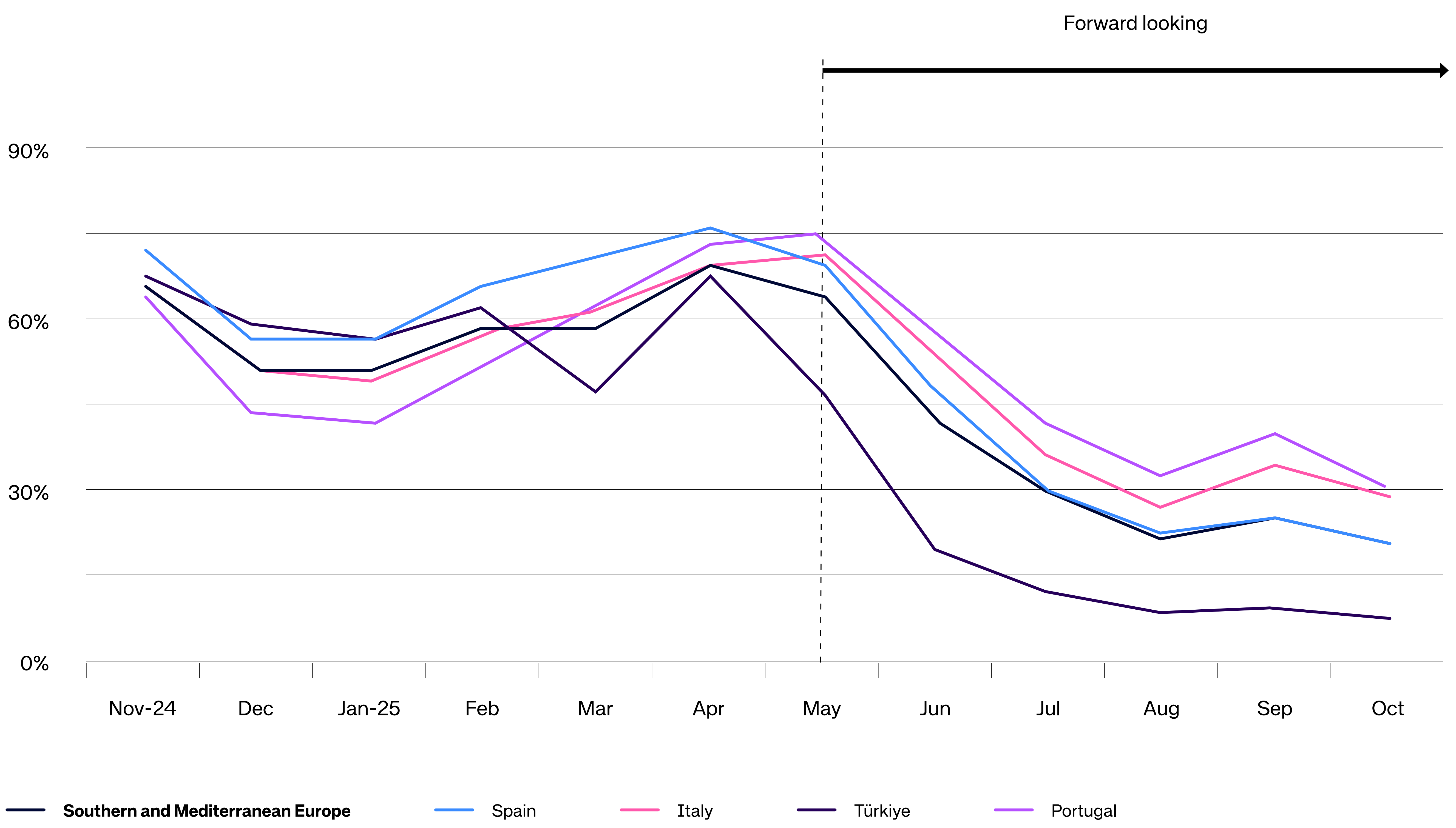
For Southern and Mediterranean Europe and its Top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy on-the-books

For Southern and Mediterranean Europe and its Top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy analysis

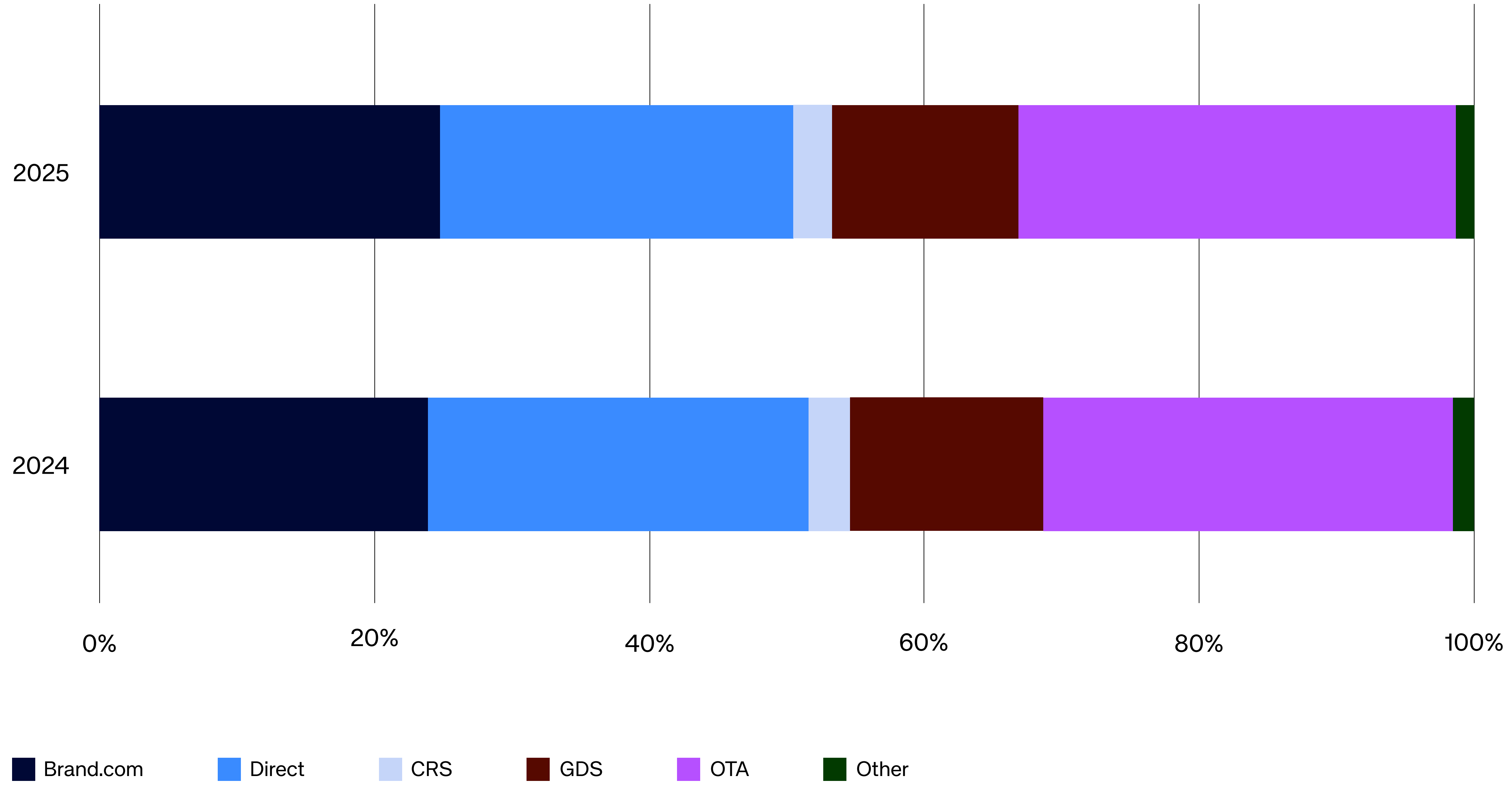
Occupancy recovery remains resilient:
Hotel occupancy across Southern and Mediterranean Europe is pacing close to 2024 levels through May 2025, with spring months showing comparable or slightly higher performance year over year-indicating steady demand and planning confidence.

Moderate variance among markets:
Italy and Portugal closely mirror the regional curve, with slight underperformance post summer-showing room for targeted late-season promotions to sustain momentum.

Recommendation for DMOs:
Leverage the current forward momentum for spring and early summer to solidify demand through promotional partnerships, then pivot toward late-season recovery strategies (August-October) with tailored offers. Emphasise local experiences, cultural authenticity, and mild climate to extend interest beyond peak months-particularly for markets like Portugal that show booking softness. Spain and Italy can serve as best-practice benchmarks for timing and messaging.

Hotel channel mix in Southern/ Mediterranean Europe

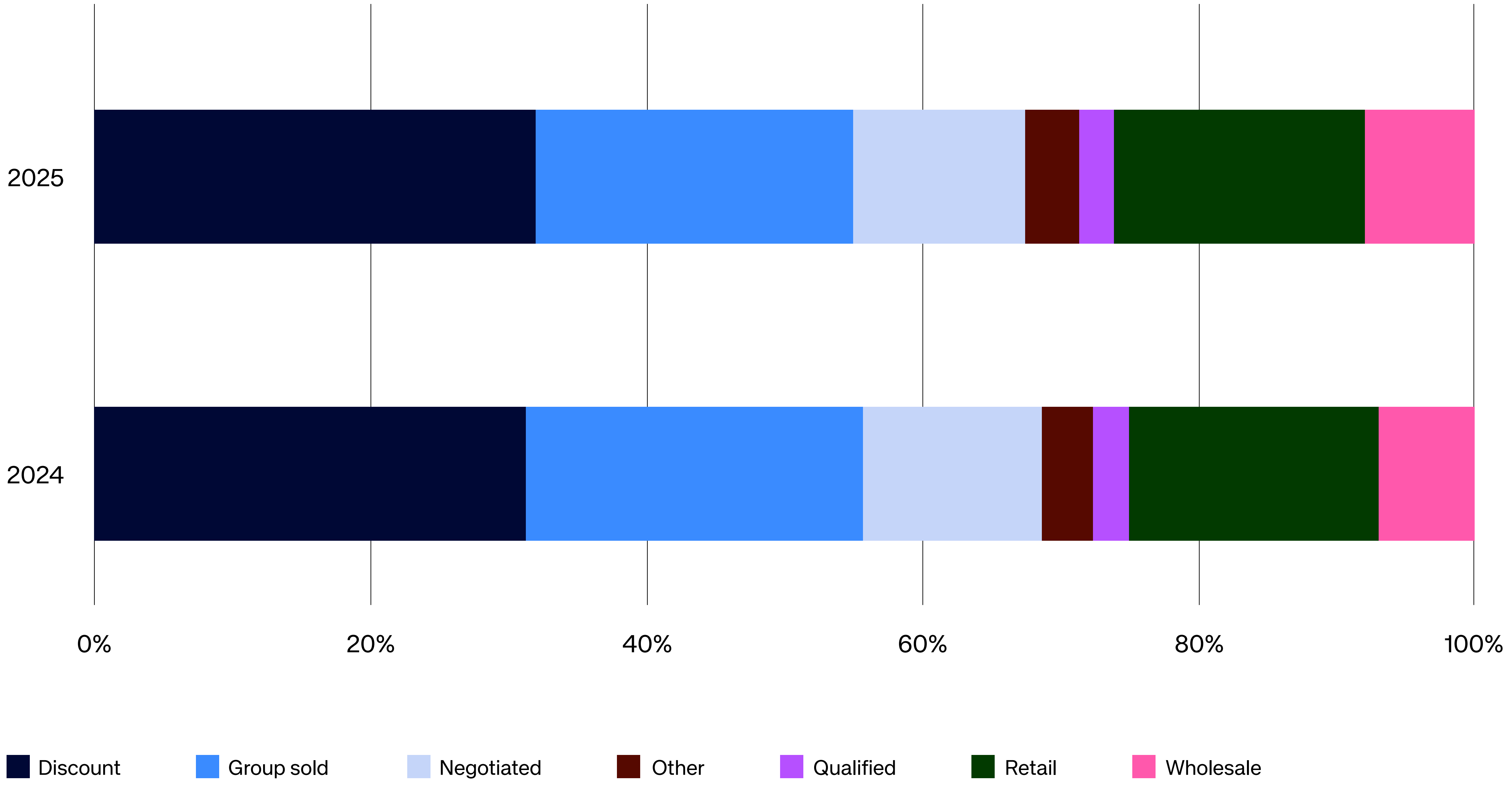
On-the-books distribution for May 2025 vs May 2024



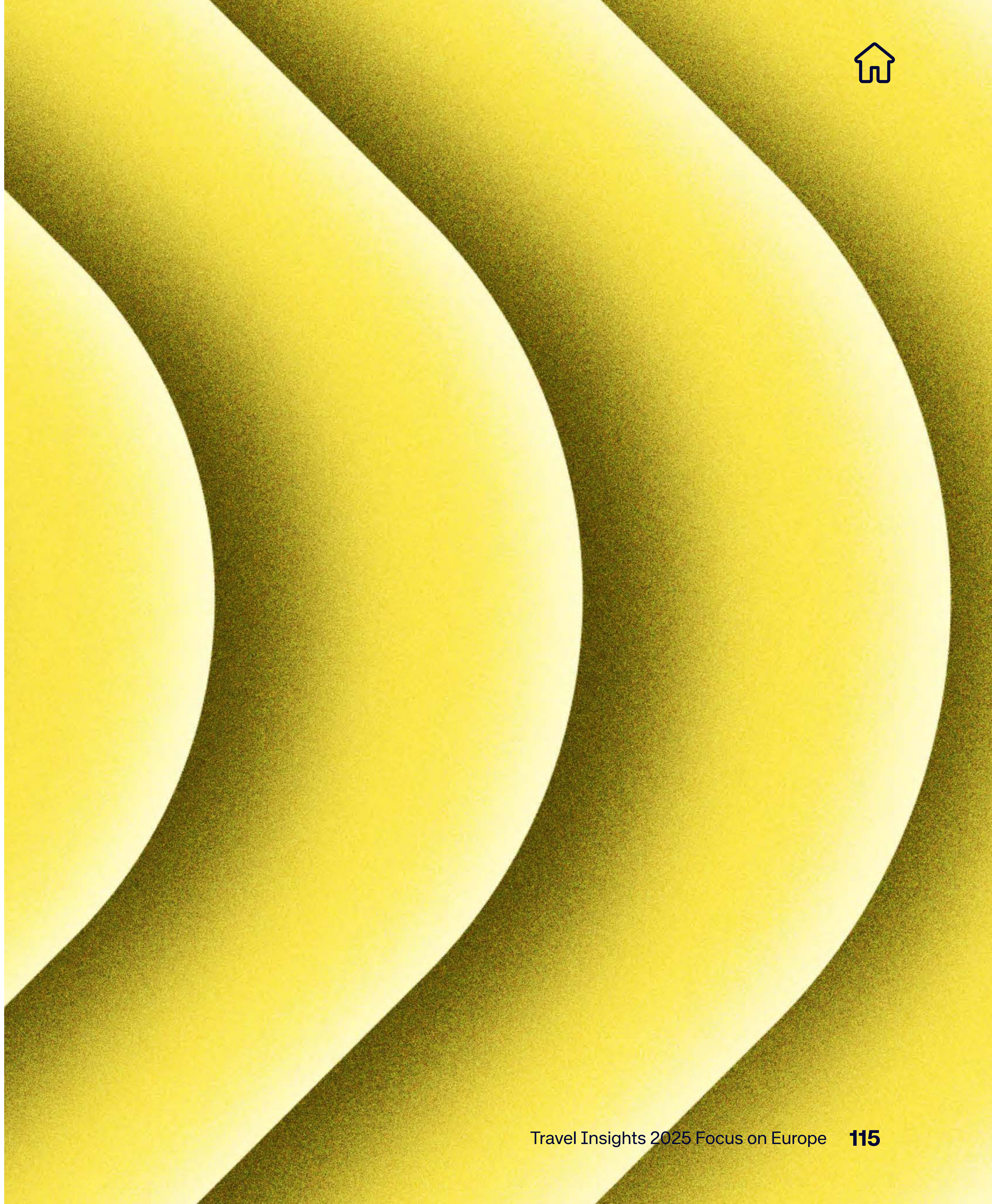
Source: Navigator360™ as of Monday, 5 May 2025

Hotel segmentation in Southern and Mediterranean Europe

On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Monday, 5 May 2025



Hotel segmentation and channel analysis in Southern and Mediterranean Europe

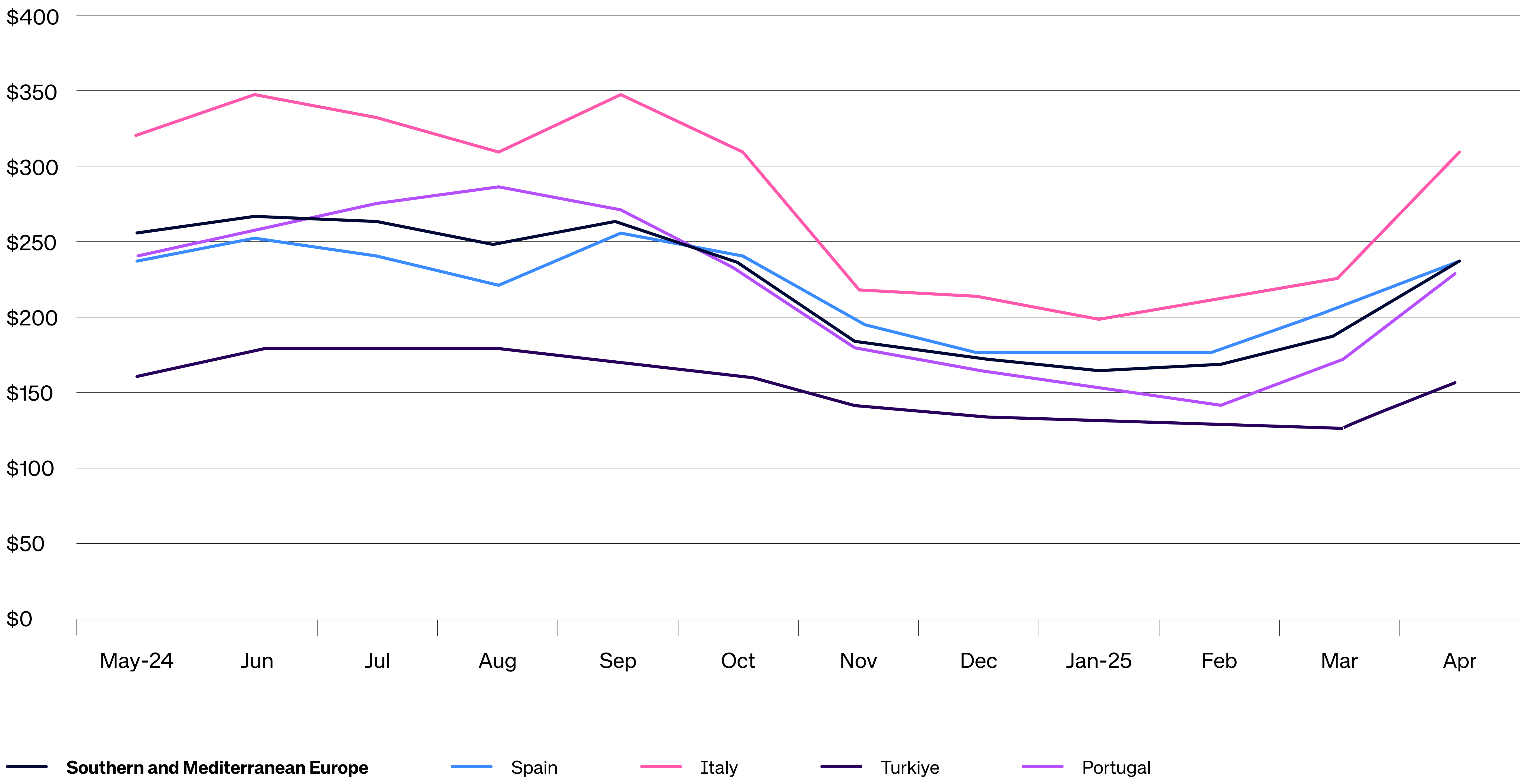
Direct channels see modest growth:
The share of bookings via direct and brand.com channels in Southern and Mediterranean Europe slightly increased year-over-year for May 2025. This suggests growing consumer confidence or brand loyalty, offering hoteliers better margins and more customer ownership.

OTA remains dominant, but stable:
Despite industry efforts to shift bookings direct, OTAs continue to hold a large share-indicating strong traveller preference for comparison platforms. Their consistent volume underlines the importance of visibility and competitive positioning on these channels.

Discount and group segments lead demand:
Discounted and group sold segments make up a significant majority of hotel bookings, with discounted slightly increasing year-over-year.

Recommendation for DMOs:
Double down on supporting local hotel partners through cooperative campaigns across both OTAs and direct channels. At the same time, consider creating tailored marketing for group travellers-such as family reunions, school trips, or cultural tours-who continue to drive a large portion of bookings in this region.

Average daily rate (ADR) in USD



Source: Navigator360™ as of Sunday, 11 May 2025

Hotel ADR analysis in Southern and Mediterranean Europe

Italy maintains consistently high ADR:
Italy shows strong year-round pricing resilience, outperforming the Southern and Mediterranean average even in off-peak periods. This stability reflects its balanced mix of leisure and business demand.

Price compression in winter months across all markets:
ADRs drop significantly across the board from November through February. This seasonal lull presents a clear window for discount-based promotions or off-season campaigns.

Recommendation for DMOs:
Capitalise on Italy's pricing power by promoting high-value, experience-driven stays during summer. Simultaneously, support off-season travel to Portugal, Spain and Türkiye with targeted campaigns focusing on mild weather, affordability, and cultural experiences to boost occupancy during lower-ADR months.

Southern and Mediterranean Europe destinations included in this analysis

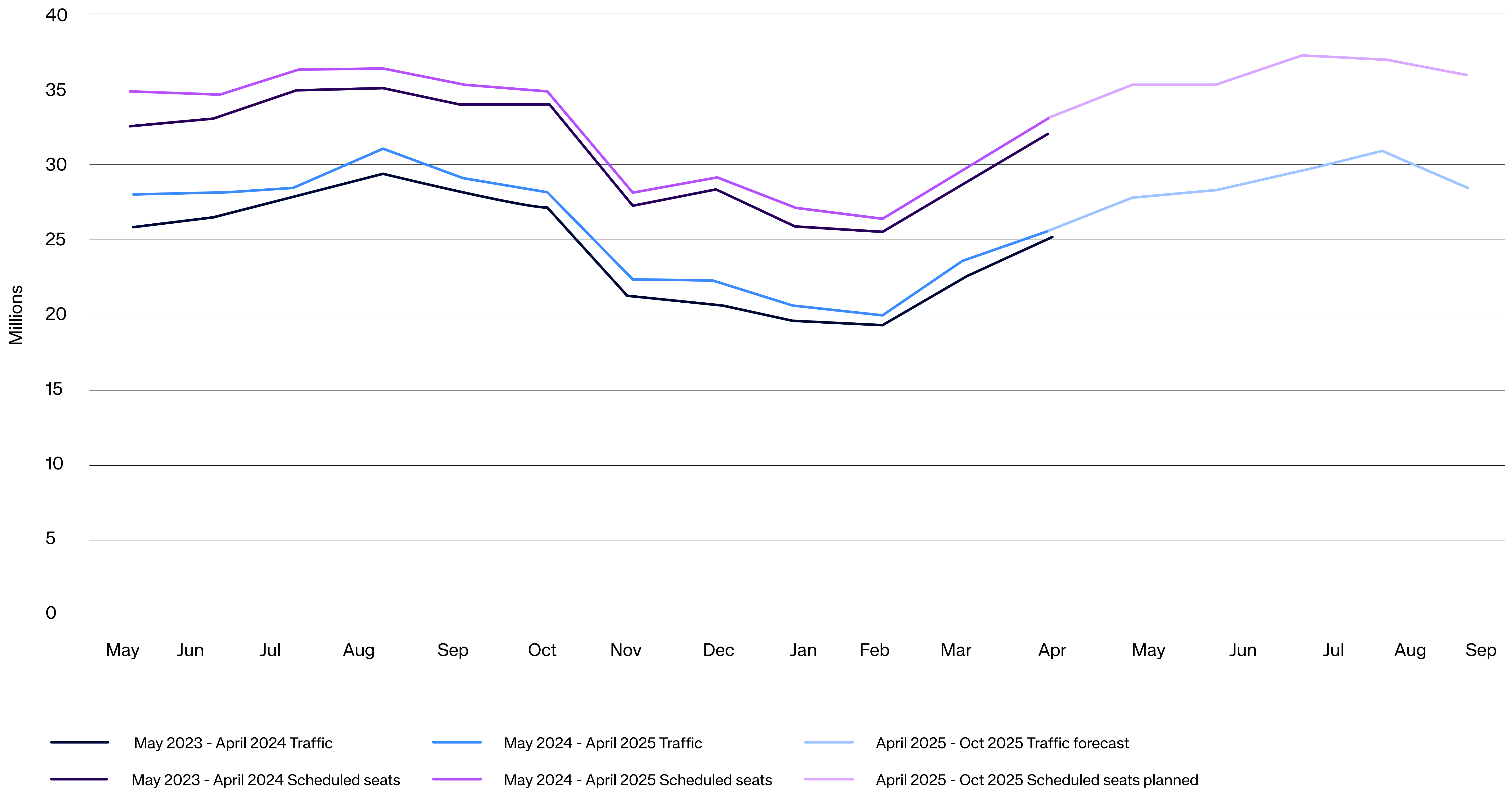
Destination country name	Sub region
Albania	Southern and Mediterranean Europe
Bosnia and Herzegovina	Southern and Mediterranean Europe
Croatia	Southern and Mediterranean Europe
Cyprus	Southern and Mediterranean Europe
Greece	Southern and Mediterranean Europe
Israel	Southern and Mediterranean Europe
Italy	Southern and Mediterranean Europe
Malta	Southern and Mediterranean Europe
Montenegro	Southern and Mediterranean Europe
North Macedonia	Southern and Mediterranean Europe
Portugal	Southern and Mediterranean Europe
Serbia	Southern and Mediterranean Europe
Slovenia	Southern and Mediterranean Europe
Spain	Southern and Mediterranean Europe
Turkiye	Southern and Mediterranean Europe

Europe - Western Europe

Air travel overview

Worldwide to Western Europe

Air passenger volume and scheduled seats



Source: Navigator360™ as of Monday, 5 May 2025

5.0% growth

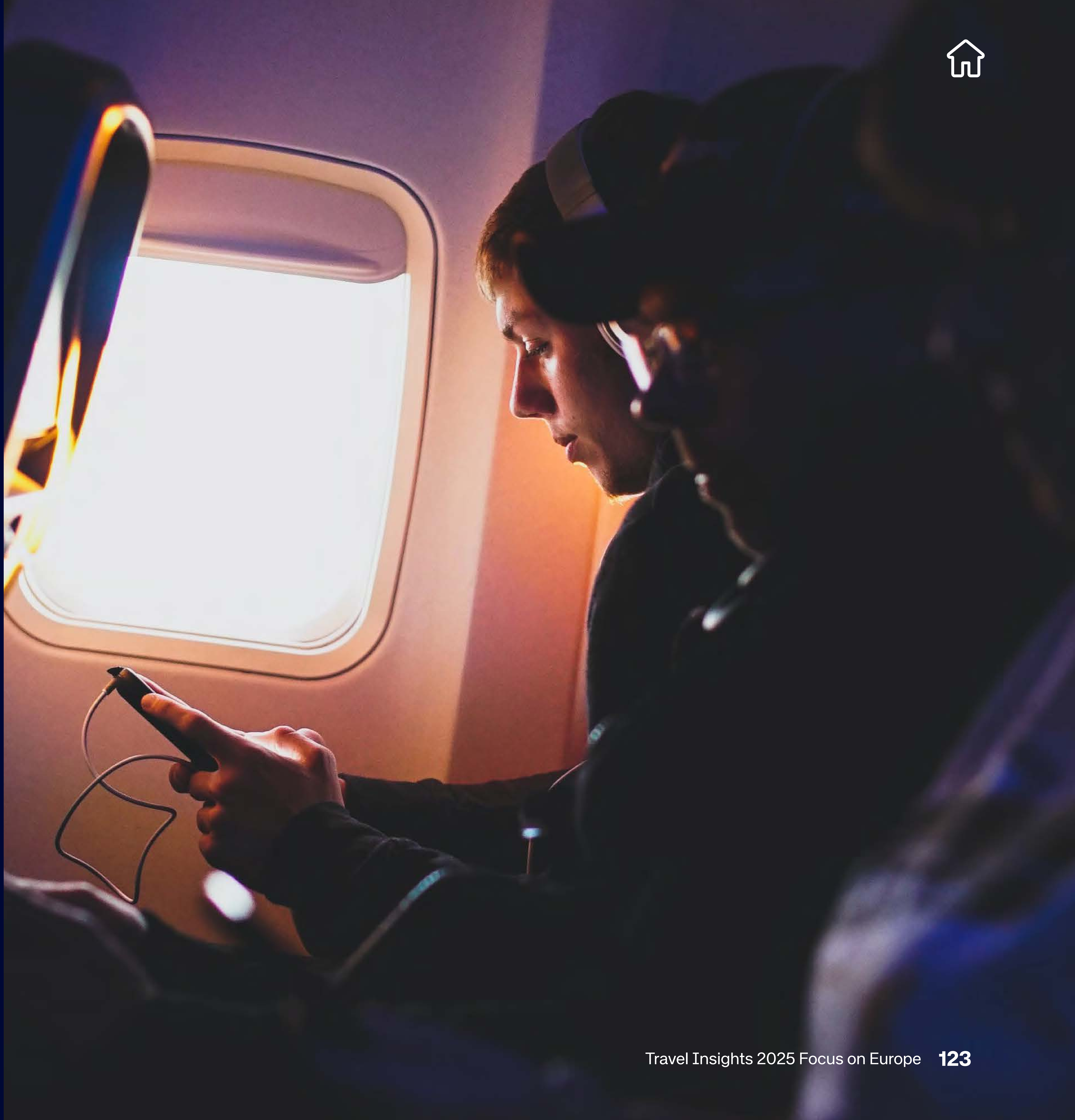
Passenger traffic and capacity analysis in Western Europe

Steady passenger recovery continues:
Passenger traffic to Western Europe recorded a 5.0% year-on-year growth, with current volumes closely tracking 2023 trends. This stable increase signals a healthy recovery trajectory without dramatic surges or lags.

Capacity outpaces demand in forecast:
Forward-looking scheduled seat capacity (April-September 2025) is rising faster than forecasted traffic. This gap suggests a competitive market environment ahead, where destinations will need to stimulate demand to match supply growth.

Summer remains the anchor season:
Peak months (June-August) maintain strong seat and passenger volumes, reinforcing summer's dominance. However, September also shows robust capacity-an opportunity for late-season promotions to extend the peak.

Recommendation for DMOs:
To maintain momentum and avoid missed opportunities, DMOs could focus on demand stimulation tactics-especially for the shoulder season in September. Consider partnering with airlines or OTAs to fill the growing capacity gap and promote value-driven travel before autumn decline sets in.



Where do visitors come from? Reality vs. aspirations

Top origin markets searching for travel to Western Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
United States	1	1
United Kingdom	3	2
Spain	2	3
Italy	5	4
France	4	5
Germany	6	6
Türkiye	7	7
China	19	8
Canada	10	9
Brazil	11	10

Top origin markets travelling to Western Europe

Origin markets	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
United States	1	1
France	2	2
Germany	3	3
United Kingdom	4	4
Italy	5	5
Spain	6	6
India	7	7
Algeria	9	8
Portugal	10	9
Türkiye	8	10

Source: Navigator360™ as of Monday, 5 May 2025

Are travellers from these markets to Western Europe already on your radar?

Top origin markets searching to Western Europe with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
China	1	159%
Japan	2	34%
India	3	22%
Norway	4	19%
Poland	5	16%
Korea (ROK)	6	15%
United Kingdom	7	14%
Denmark	8	14%
United States	9	12%
Switzerland	10	10%

Top origin markets travelling to Western Europe with the highest growth (among the Top 30)

Origin markets	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Japan	1	14%
Tunisia	2	5%
Egypt	3	5%
Denmark	4	4%
Lebanon	5	3%
Norway	6	3%
Sweden	7	1%
Switzerland	8	1%
Algeria	9	0%
Morocco	10	0%

Source: Navigator360™ as of Monday, 5 May 2025

Who is searching and visiting Western Europe analysis

The United States maintains its top spot as demand powerhouse:
The United States continues to lead both in search interest and actual travel to Western Europe, solidifying its position as the region's most valuable long-haul market.

Rise of China and Japan in search trends:
China jumped from 19th to 8th in search interest (YoY +159%), while Japan ranked 2nd in search growth, signaling a revival of long-haul interest from Asia-though actual travel volumes remain relatively modest.

Stable core European demand, with modest growth:
Western Europe continues to rely on nearby markets like France, Germany, and the United Kingdom, which remain in the top five for actual travel.

Recommendation for DMOs:
Double down on promotional efforts in the United States and United Kingdom, focusing on high-value travellers. Meanwhile, activate awareness-building and partnership campaigns in high-growth aspirational markets like China and Japan to convert future demand. Consider also nurturing regional travel from nearby North African markets, offering targeted value-based propositions that align with cultural proximity and affordability.

Where do visitors go? Reality vs. aspirations

Top searched destinations in Western Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
France	1	1
Germany	2	2
Netherlands	3	3
Switzerland	4	4
Austria	5	5
Belgium	6	6
Luxembourg	7	7

Top booked destinations in Western Europe

Destinations	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking
France	1	1
Germany	2	2
Netherlands	3	3
Switzerland	4	4
Belgium	5	5
Austria	6	6
Luxembourg	7	7

Source: Navigator360™ as of Monday, 5 May 2025

Top performing destinations in Western Europe

Top searched destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Switzerland	1	14%
Netherlands	2	11%
Austria	3	10%
Germany	4	3%
Belgium	5	3%
France	6	2%
Luxembourg	7	2%

Top booked destinations with the highest growth
(among the Top 30)

Destinations	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Luxembourg	1	1%
Switzerland	2	-2%
Netherlands	3	-2%
Belgium	4	-3%
France	5	-4%
Austria	6	-4%
Germany	7	-5%

Source: Navigator360™ as of Monday, 5 May 2025

Where are travellers going to in Western Europe

Aspirations align with reality:
The top 7 destinations-France, Germany, Netherlands, Switzerland, Austria, Belgium, and Luxembourg-consistently rank highest in both searches and bookings. This alignment between interest and conversion indicates strong brand awareness and competitive positioning.

Switzerland, Netherlands, and Austria see strongest growth:
Among searched destinations, Switzerland leads with +14% year-on-year growth, followed by Netherlands (+11%) and Austria (+10%). This shows rising interest, especially from markets likely drawn to alpine tourism and culture.

Luxembourg stands out in bookings:
Despite lower search volume growth (+2%), Luxembourg ranks as the top growth destination in bookings, potentially indicating effective conversion strategies (pricing, accessibility, or targeted campaigns).

Recommendation for DMOs:
Capitalise on rising momentum in Switzerland, Netherlands, and Austria by amplifying visibility through seasonal packages, cultural storytelling, and nature-based experiences. For countries like Luxembourg, explore how booking intent is being captured effectively, and replicate best practices in lower-performing yet well-searched markets like France and Belgium. Collaboration between neighbouring countries could also unlock shared visitor growth through regional itineraries.

Where do visitors go? Reality vs. aspirations

Top searched destinations in Western Europe

Destination cities	May 23 - Apr 24 ranking	May. 24-Apr.25 ranking
Paris (FR)	1	1
Amsterdam (NL)	2	2
Frankfurt Am Main (DE)	3	3
Berlin (DE)	4	4
Munich (DE)	5	5
Vienna (AT)	6	6
Zurich (CH)	8	7
Brussels (BE)	7	8
Düsseldorf (DE)	9	9
Nice (FR)	10	10

Top booked destinations in Western Europe

Destination cities	May 23 - Apr 24 ranking	May 24 - Apr 25 ranking	May 24 - Apr 25 vs May 23 - Apr 24
Paris (FR)	1	1	-4%
Amsterdam (NL)	2	2	-2%
Frankfurt Am Main (DE)	3	3	-5%
Munich (DE)	4	4	-1%
Zurich (CH)	5	5	-1%
Brussels (BE)	6	6	-3%
Vienna (AT)	7	7	-3%
Berlin (DE)	8	8	-2%
Geneve (CH)	9	9	-3%
Nice (FR)	10	10	0%

Source: Navigator360™ as of Sunday, 25 May 2025

Top performing destinations in Western Europe

Top searched destinations with the highest growth (among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Basel (CH)	1	42%
Zurich (CH)	2	15%
Munich (DE)	3	14%
Amsterdam (NL)	4	14%
Vienna (AT)	5	12%
Paris (FR)	6	11%
Berlin (DE)	7	9%
Nice (FR)	8	9%
Salzburg (AT)	9	7%
Geneve (CH)	10	7%

Top booked destinations with the highest growth (among the Top 30)

Destination cities	May 24 - Apr 25 vs May 23 - Apr 24 ranking	YoY growth
Bastia (FR)	1	1%
Nantes (FR)	2	1%
Luxembourg (LU)	3	1%
Nice (FR)	4	0%
Munich (DE)	5	-1%
Lille (FR)	6	-1%
Ajaccio (FR)	7	-1%
Zurich (CH)	8	-1%
Berlin (DE)	9	-2%
Amsterdam (NL)	10	-2%

Source: Navigator360™ as of Sunday, 25 May 2025

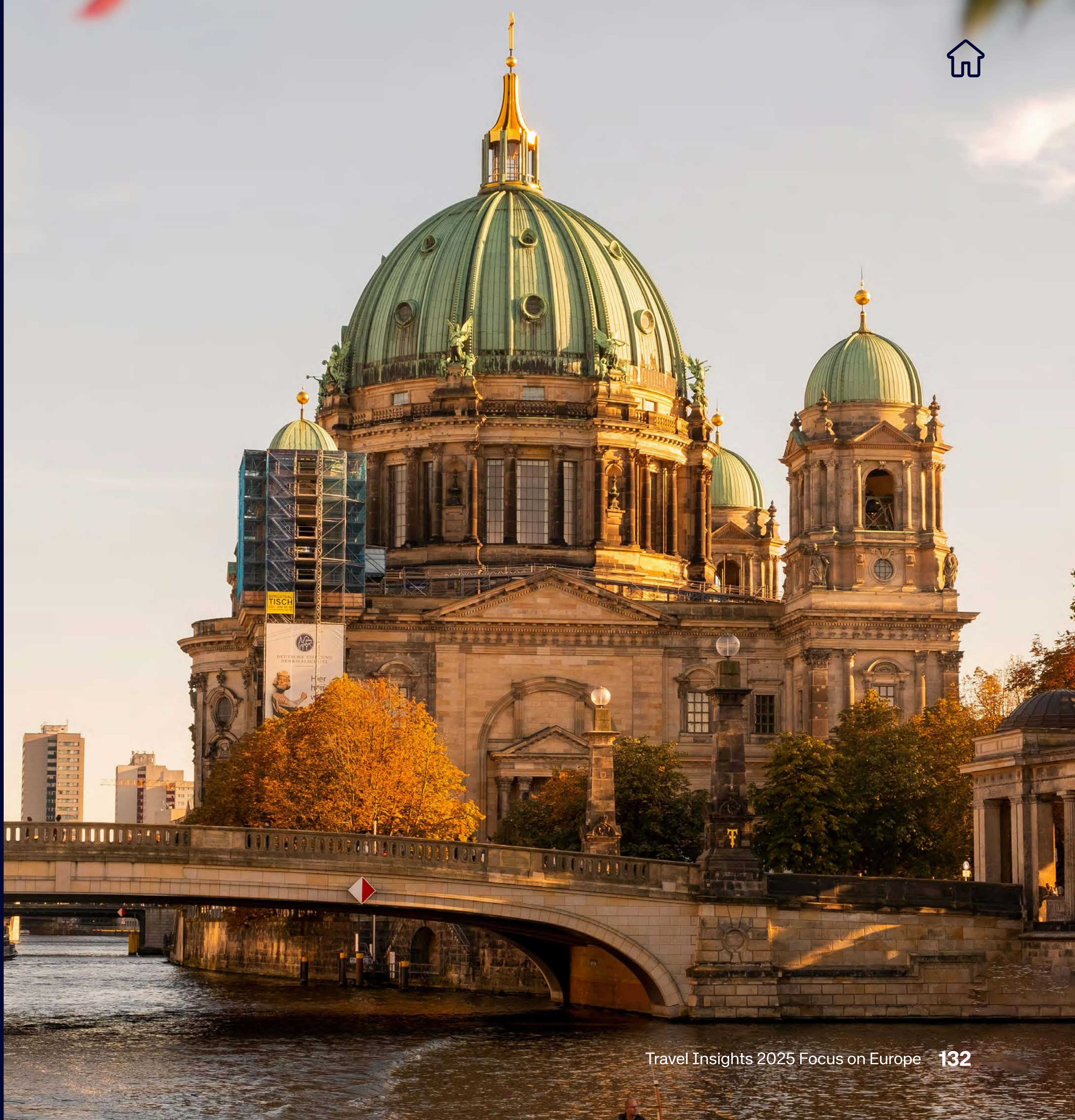
Which cities travellers are going to in Western Europe

Paris and Amsterdam maintain leadership:
Paris and Amsterdam continue to dominate both search and booking rankings for Western Europe, showing strong alignment between aspiration and actual travel behaviour. This reinforces their position as key anchors in regional tourism demand.

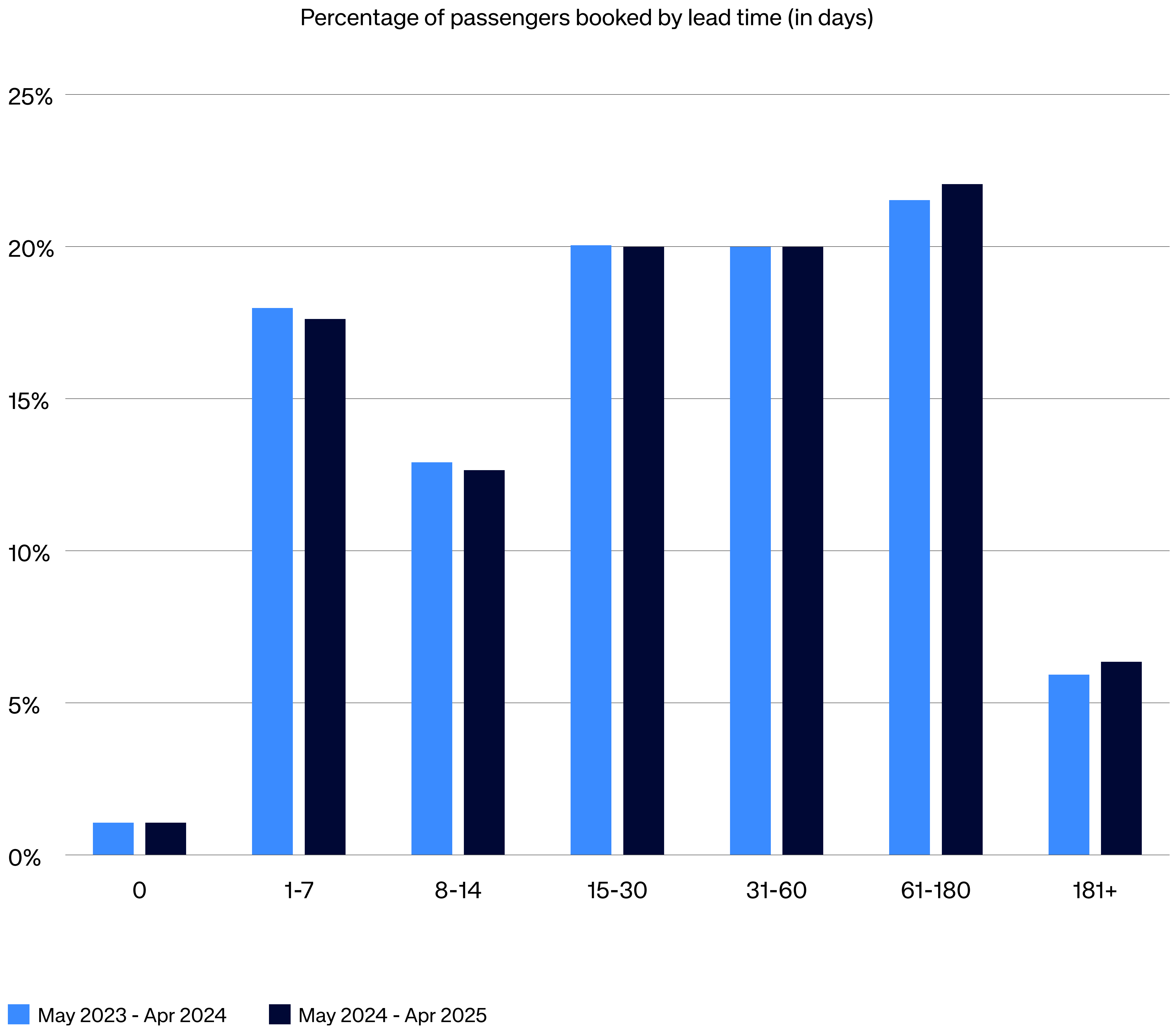
Growth in Swiss and German cities:
Cities like Basel (+42%) and Zurich (+15%) lead year-on-year search growth, while Munich (+14%) and Berlin (+9%) also rank among the top risers-indicating renewed interest in urban, possibly business or multi-purpose travel. Zurich and Geneva also saw steady bookings.

Regional France on the rise:
Regional French cities-Bastia (BIA), Nantes (NTE), stand out in booking growth, signaling that travellers are increasingly exploring beyond the capital. This suggests interest in secondary destinations, especially among repeat visitors or those seeking less crowded experiences.

Recommendation for DMOs:
Destinations could double down on marketing efforts in rising Swiss and German cities (like Basel and Munich) while supporting regional France's momentum through themed campaigns (e.g. gastronomy, heritage, wellness). Encourage longer itineraries that pair iconic hubs like Paris with lesser-known gems, boosting dispersion and revenue.



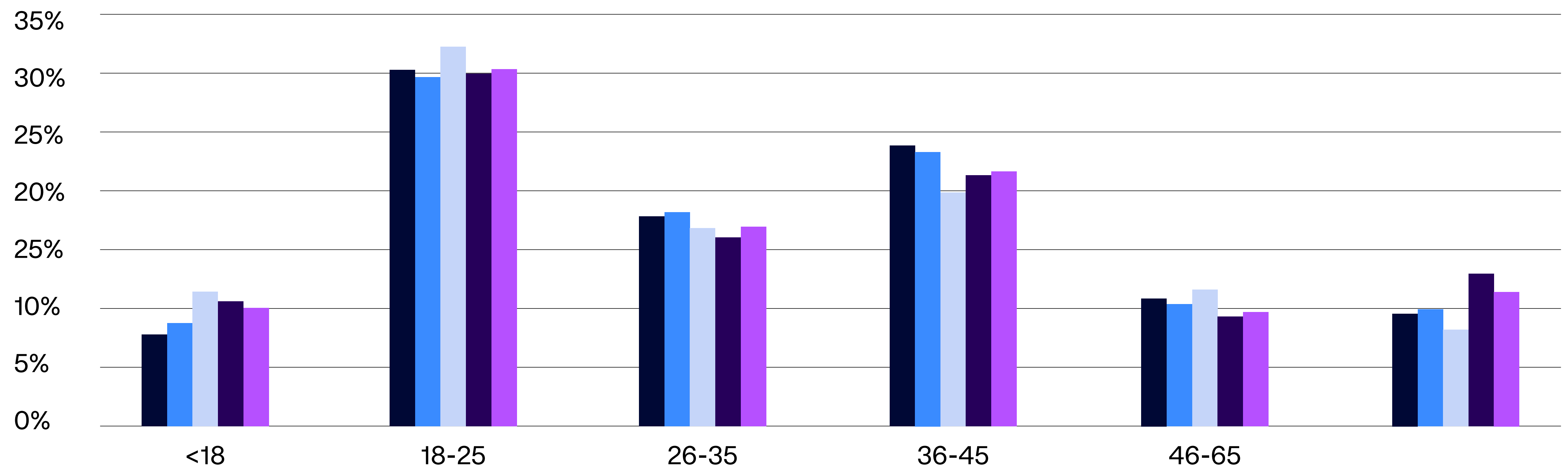
Air travel bookings to Western Europe by lead time



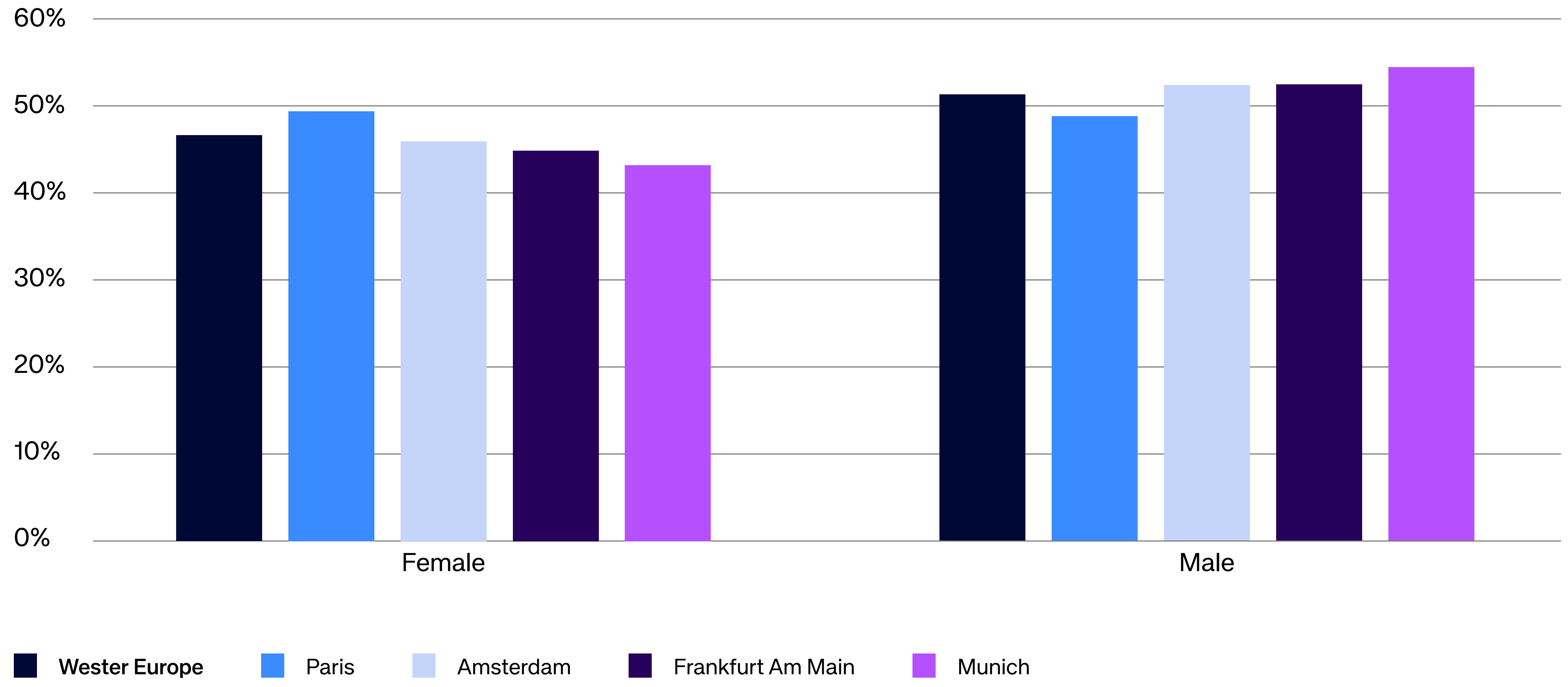
Source: Navigator360™ as of Monday, 5 May 2025

What type of travellers travel to Western Europe: top destinations

Percentage of passengers booked by age category



Percentage of passengers booked by gender



Source: Navigator360™ as of Monday, 5 May 2025

Lead time and profile analysis

Stable long-lead booking patterns persist:
Nearly 45% of passengers continue to book trips to Western Europe more than 60 days in advance, with very little shift year over year. This consistency offers predictability for early marketing and pricing strategies, especially for long-haul travellers.

Older age groups drive travel demand:
Travellers aged 46–65 are the leading age group across the region and especially in cities like Munich and Amsterdam. This mature segment shows higher intent and planning behaviour, suggesting greater purchasing power and longer stays.

Recommendation for DMOs:
Destinations could bet on early-in-the-season campaigns targeting the 46-65 age group, especially for cities like Munich and Amsterdam where booking lead times align with long-haul and high-intent travellers. Use messaging that resonates with mature audiences-think curated cultural itineraries, luxury comfort, and longer-stay value. Additionally, leverage gender insights for city-level personalisation in paid media and partner campaigns.

715 new routes in Western Europe

Origin country	New routes
Italy	65
Spain	53
Türkiye	33
United Kingdom	32
Finland	26
Morocco	25
Germany	24
Greece	22
Portugal	19
United States	18

Top new international routes (based on seat capacity)

New routes	Origin market	Destination market
SHA-BRU	China	Belgium
DOH-HAM	Qatar	Germany
NBO-BRU	Kenya	Belgium
TPA-AMS	United States	Netherlands
RDU-FRA	United States	Germany
PHX-PAR	United States	France
PHL-NCE	United States	France
SEA-MUC	United States	Germany
BKK-BRU	Thailand	Belgium
QIN-DUS	Türkiye	Germany

Source: Navigator360™ as of Sunday, 25 May 2025

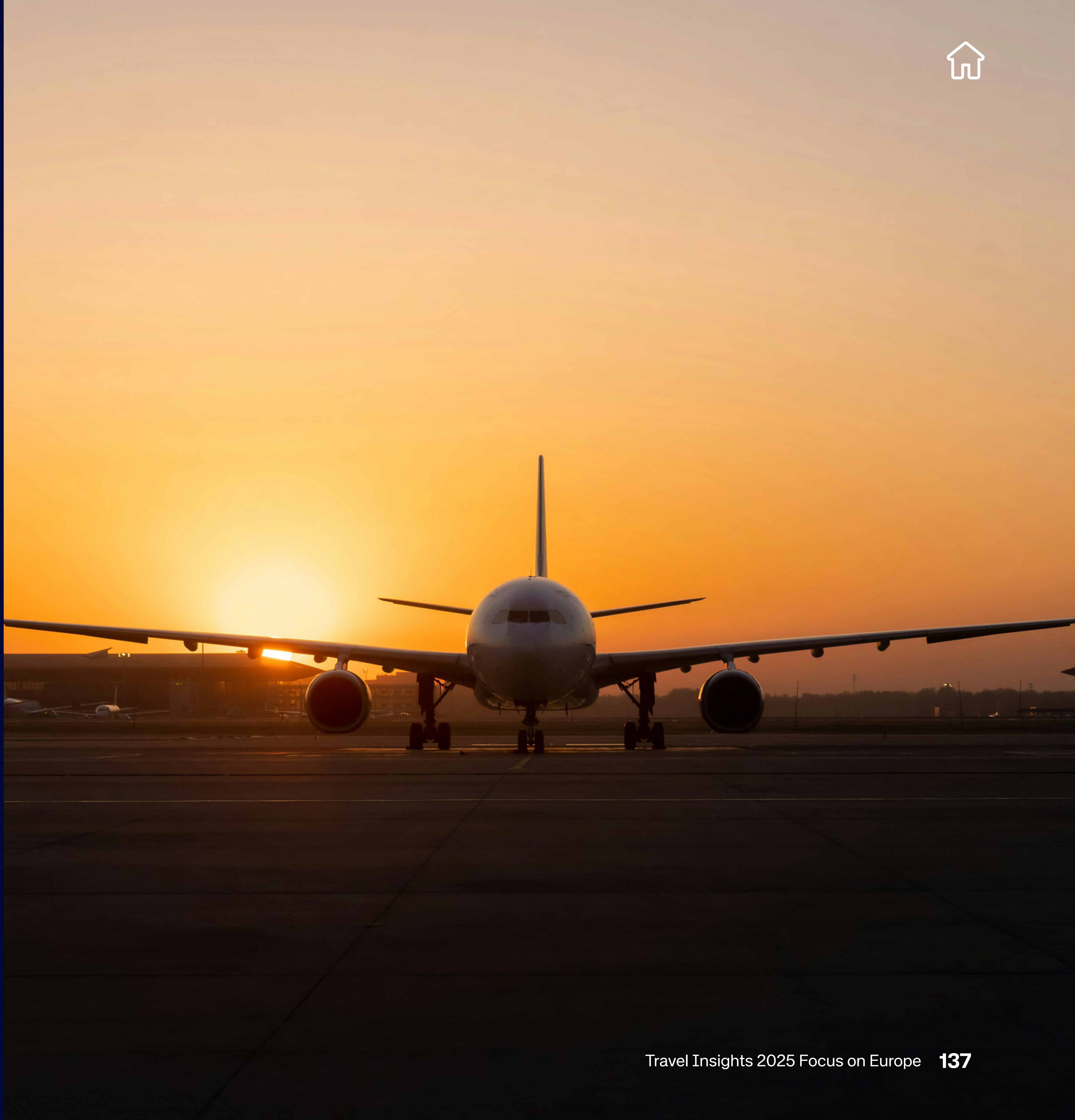
Key insights on new routes in Western Europe

Major route expansion anchored in southern hubs:
Italy and Spain lead new route creation in Western Europe with 65 and 53 additions, respectively-highlighting continued investment in these popular outbound hubs. Türkiye and the United Kingdom also contribute significantly, each adding 30+ new routes.

Emerging long-haul connectivity trends:
The top new international routes include significant long-haul links from Asia (Thailand, China, Qatar) and Africa (Kenya) into Belgium. This underscores Western Europe's growing appeal to high-growth source markets.

Brussels gains strategic importance:
Belgium stands out as a top recipient of new international connections, with Brussels (BRU) linked directly to major Asian cities like Bangkok (BKK) and Shanghai (SHA), as well as to Kenya (NBO). This positions Brussels as a rising international gateway.

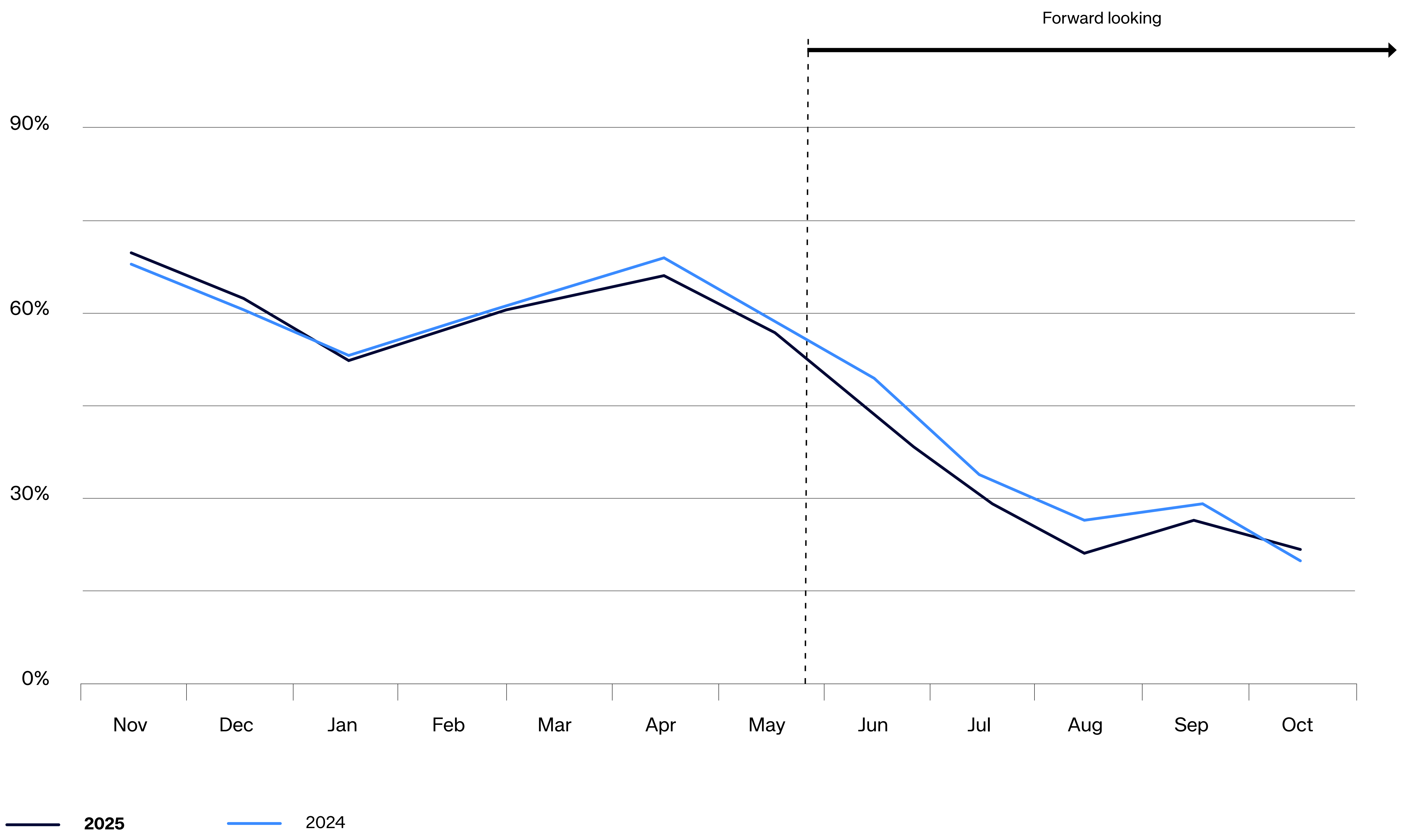
Recommendation for DMOs:
Consider capitalising on new air connectivity by launching cooperative marketing campaigns and partnership programs with airlines and tour operators in newly linked origin markets, especially in Asia and Africa. For cities gaining new intra-European routes, local DMOs could prepare tailored offers to boost short-stay demand and highlight proximity to regional experiences.



Hospitality occupancy overview

Hotel occupancy in Western Europe

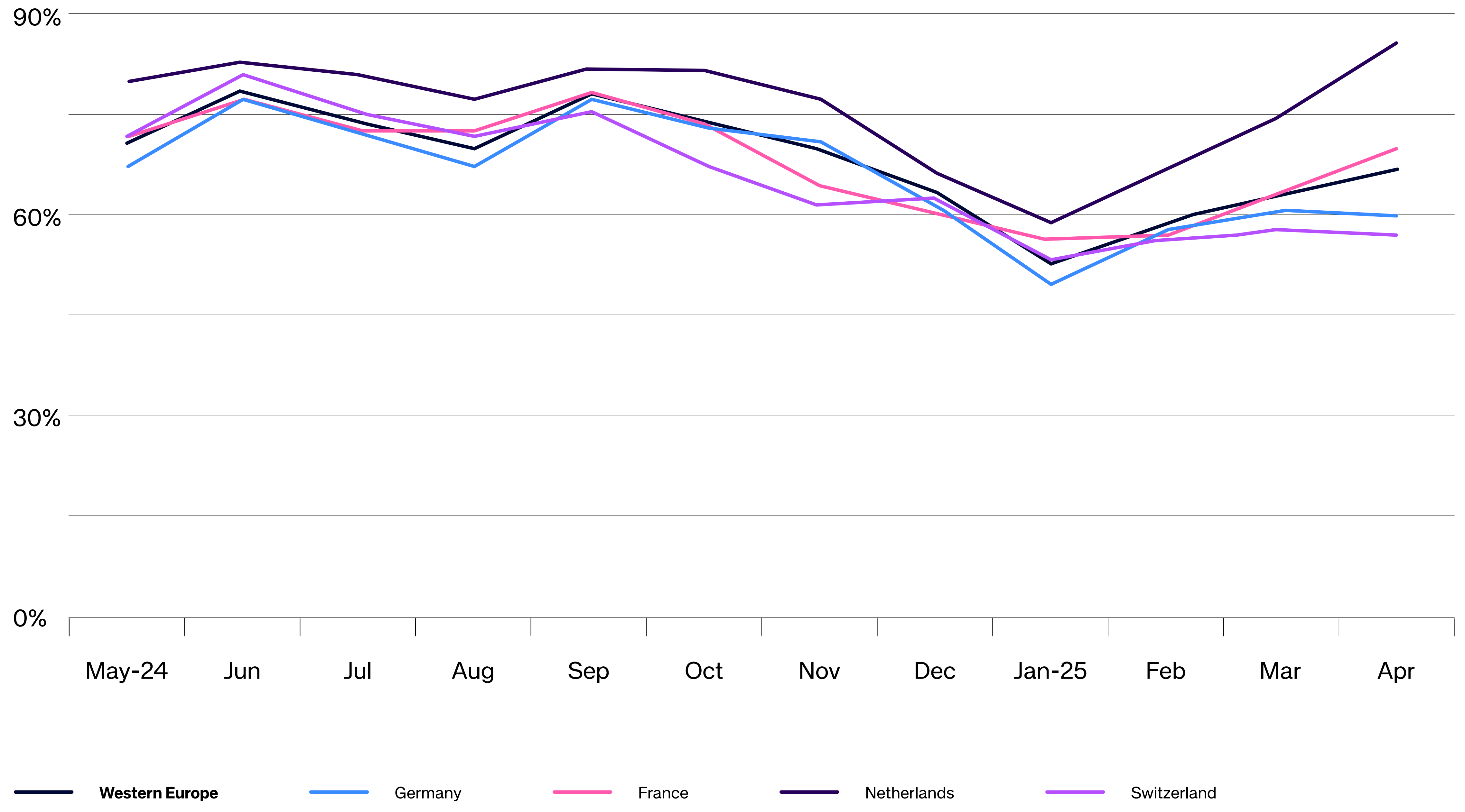
On-the-books by month compared to same month last year (%)



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy for the past 12 months

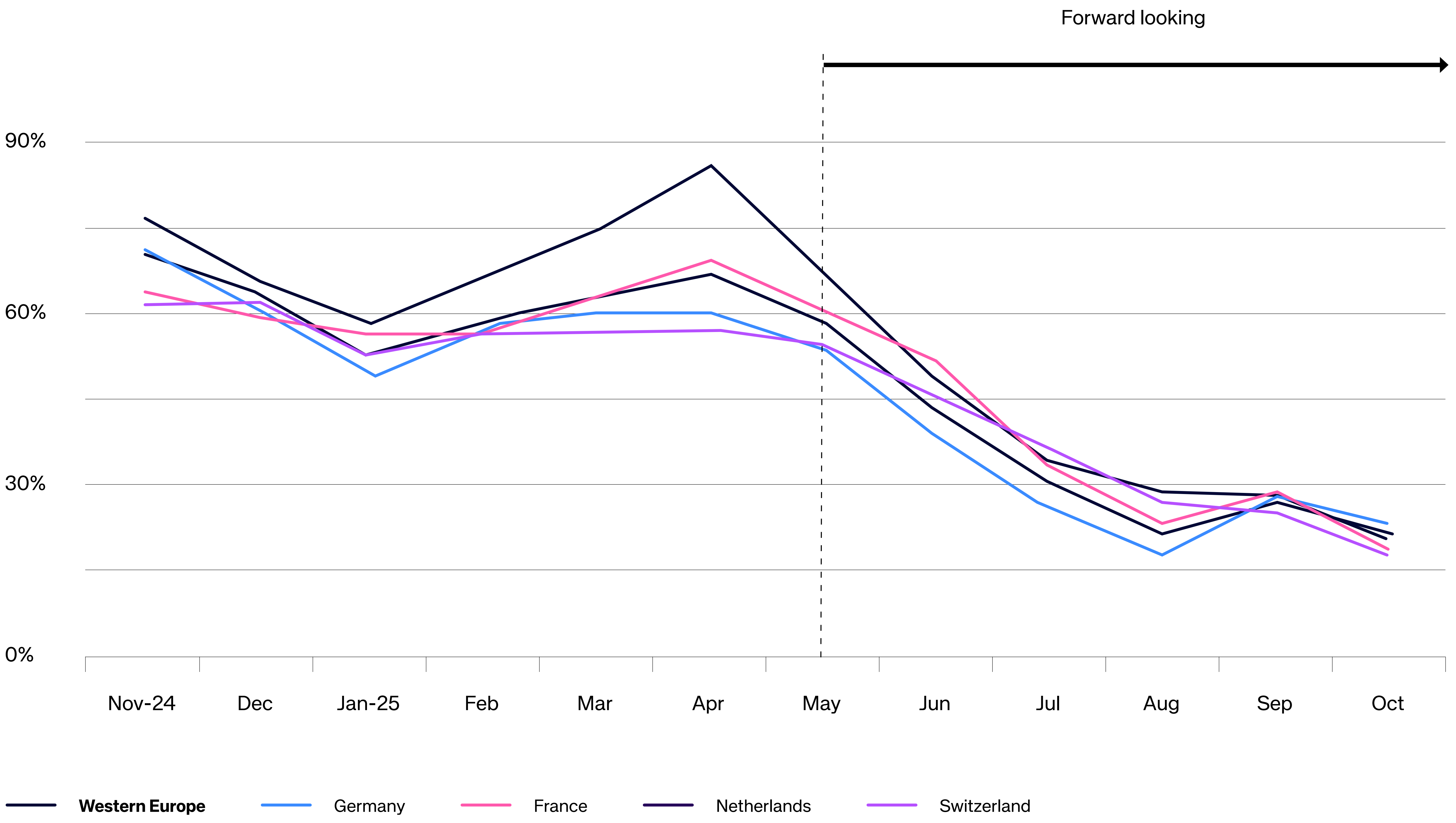
For Western Europe and its Top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy on-the-books

For Western Europe and its Top markets



Source: Navigator360™ as of Monday, 5 May 2025

Hotel occupancy analysis

April 2025 saw the peak before the decline:
Occupancy peaked in April 2025 across all countries and the region overall. This mirrors last year's trend but appears to drop off more steeply into the summer, particularly for France and Switzerland.

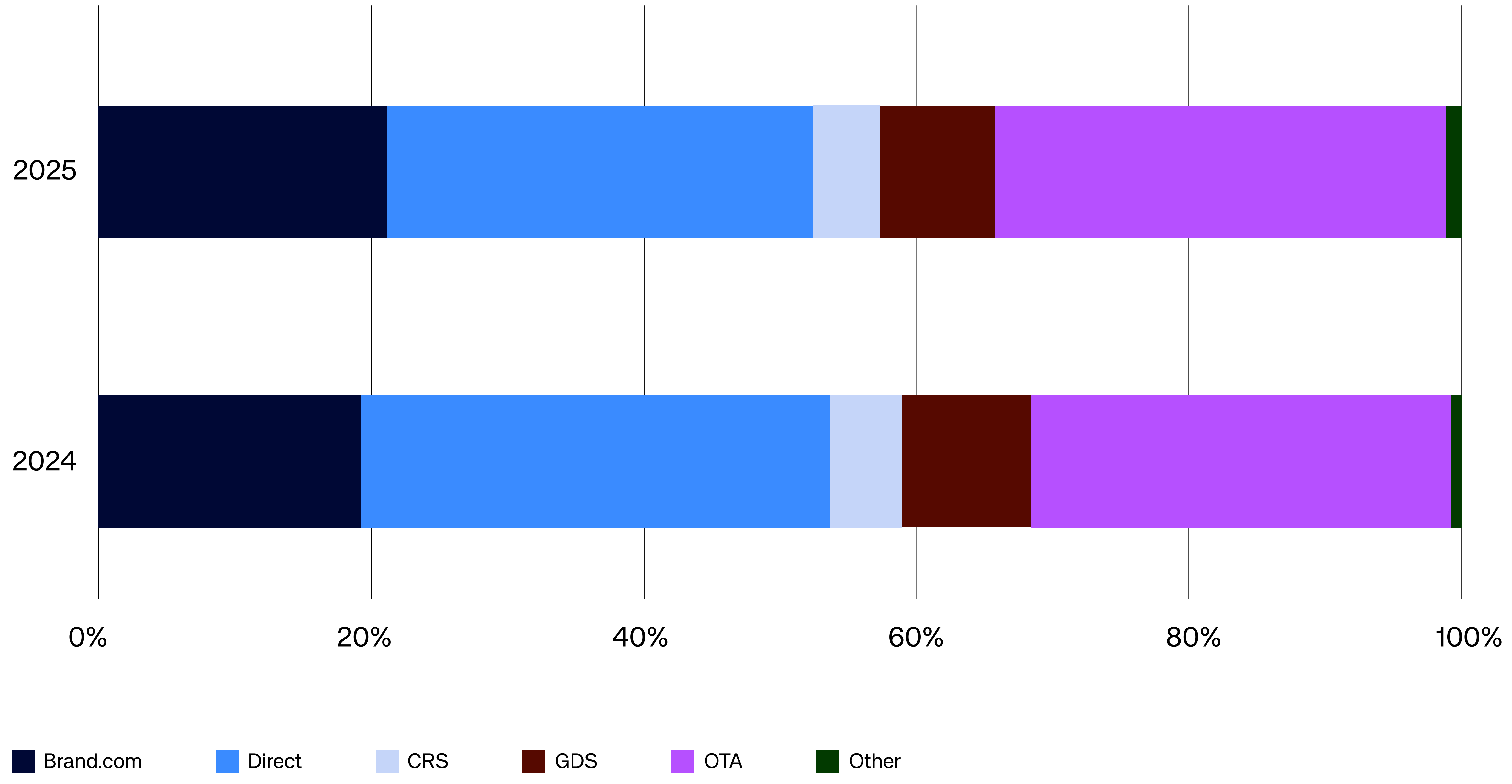
Netherlands shows strong momentum:
Among the top markets, Netherlands consistently outperforms the regional average in both past and forward-looking occupancy. It maintained a stronger recovery and holds the highest forward-booked levels from May onwards, indicating robust domestic and international demand.

Year-round patterns show winter low points, steady spring recovery:
The typical seasonal pattern is visible: low occupancy from December-February, with steady recovery beginning in March. However, 2025 appears to be slightly flatter in recovery, which may reflect caution in booking behaviour or pricing dynamics.

Recommendation for DMOs:
Consider starting to move now to boost summer conversion-particularly in markets like France and Switzerland-by launching urgency-driven campaigns that target travellers already searching but not yet booking.

Hotel channel mix in Western Europe

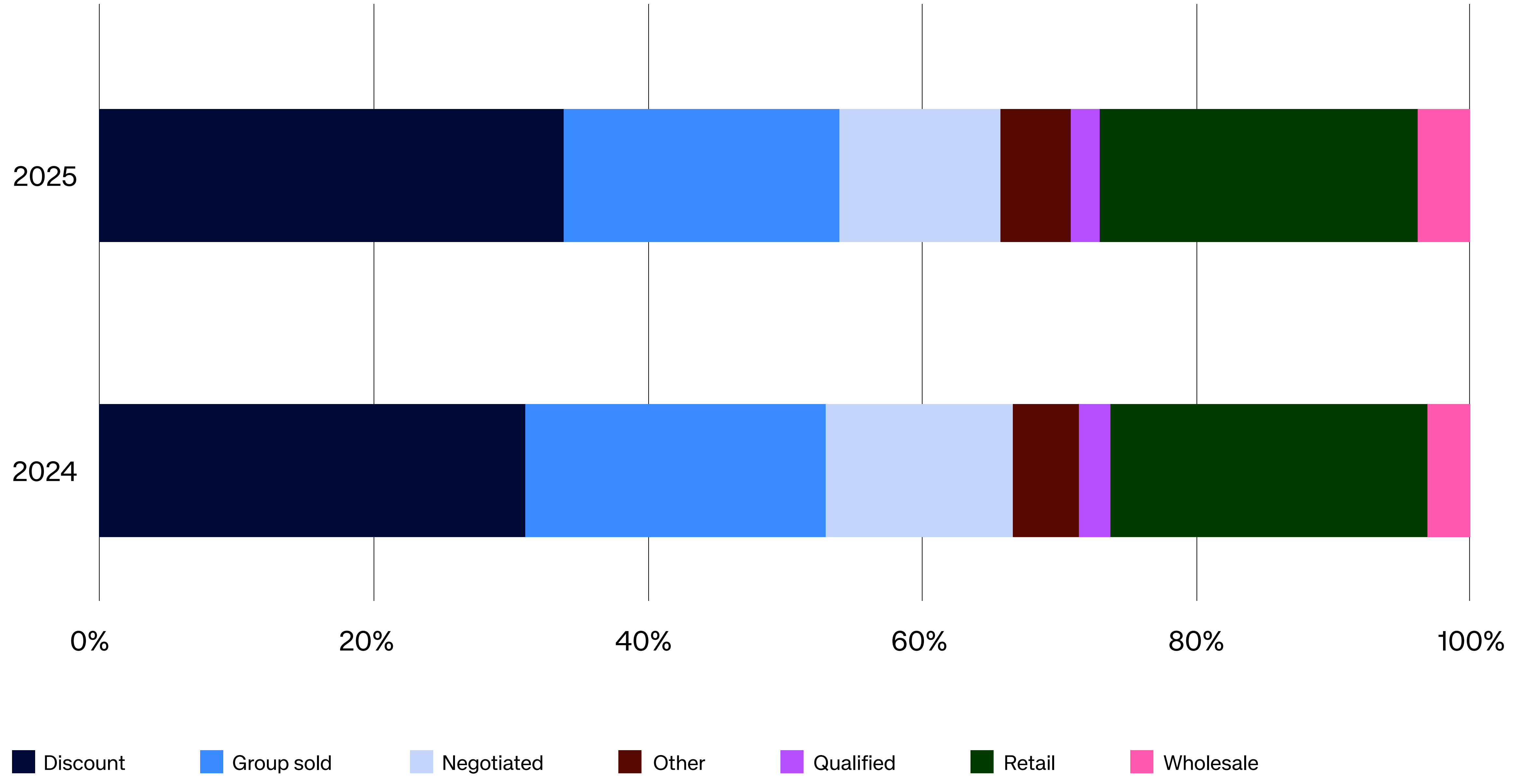
On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Monday, 5 May 2025

Hotel segmentation in Western Europe

On-the-books distribution for May 2025 vs May 2024



Source: Navigator360™ as of Monday, 5 May 2025

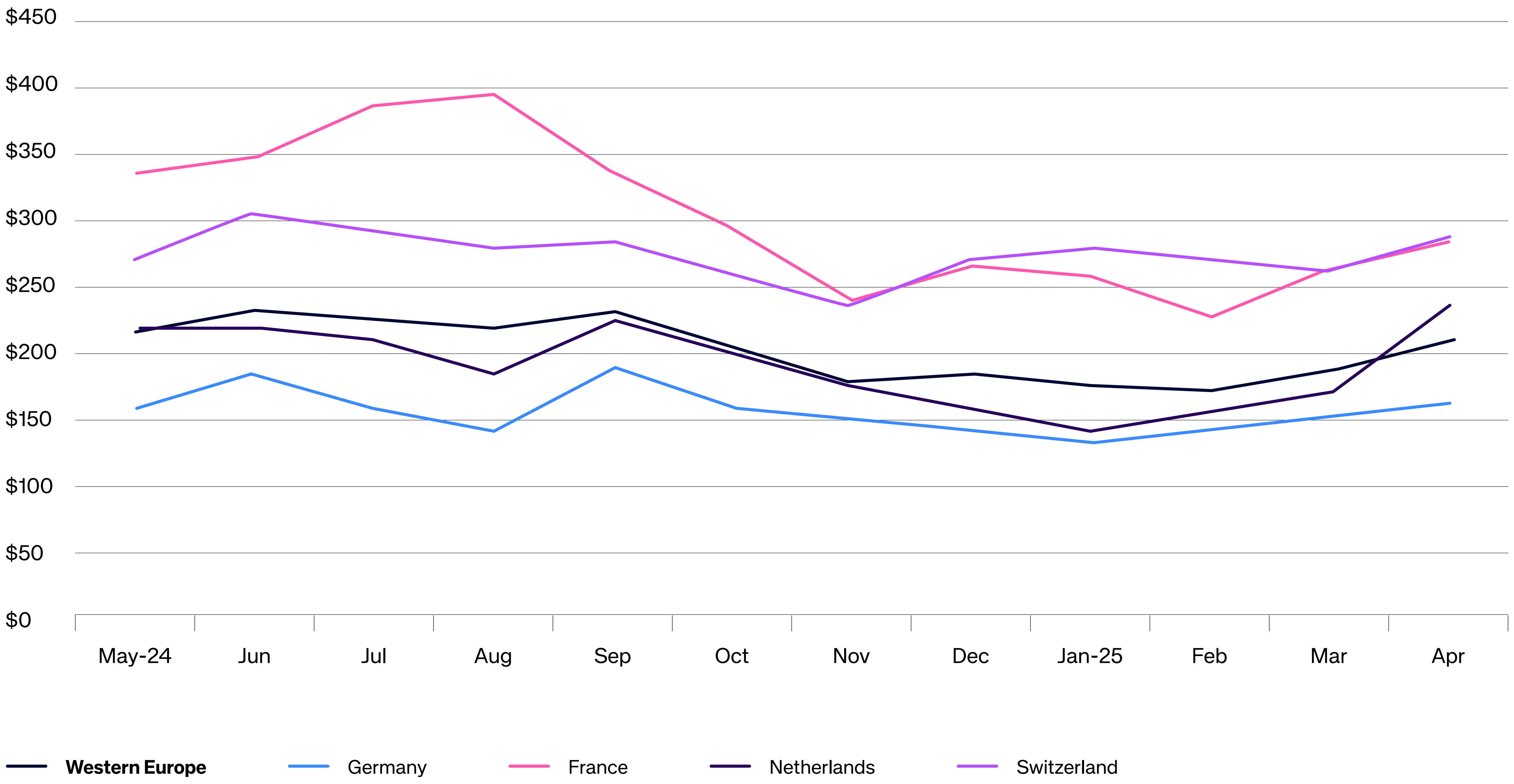
Hotel segmentation and channel analysis in Western Europe

Direct booking channels hold strong:
Direct bookings (including direct and brand.com) remain the dominant channel in May 2025, sustaining their lead from 2024. This indicates continued traveller preference for booking direct with the property.

Discount and group segments gain share:
Both discount and group sold segments increased their share in May 2025, while retail and wholesale saw a minor decline. This suggests hotels are leveraging bulk or value-driven strategies to drive occupancy.

Recommendation for DMOs:
Consider capitalising on the strong performance of direct and group/discount channels by aligning campaigns with hotel partners' value propositions-such as exclusive group experiences or direct booking perks-to attract price sensitive and organised travel groups.

Average daily rate (ADR) in USD



Source: Navigator360™ as of Monday, 5 May 2025

Hotel ADR analysis in Western Europe

France commands premium ADR:
France consistently leads Western Europe with the highest ADR, peaking around $390 in August 2024, suggesting strong demand and pricing power in the market during peak season.

Switzerland maintains pricing stability:
Switzerland shows the most stable ADR throughout the year, ranging between $260-$300, indicating sustained value perception and a steady upscale market.

Germany lags behind in rate recovery:
Germany remains the lowest among the top markets in terms of ADR, with a muted recovery and relatively flat growth, highlighting potential pricing pressure or slower demand.

Recommendation for DMOs:
DMOS can promote value-rich experiences in lower-ADR markets like Germany to compete with premium destinations, while supporting France and Switzerland with campaigns that justify their higher price point-focusing on exclusivity, culture, and seasonal demand surges.

Western Europe destinations in the analysis

Destination	Sub region
Austria	Western Europe
Belgium	Western Europe
France	Western Europe
Germany	Western Europe
Liechtenstein	Western Europe
Luxembourg	Western Europe
Monaco	Western Europe
Netherlands	Western Europe
Switzerland	Western Europe

In collaboration with