



Travel Insights 2026

Focus on Europe

May 2025 - April 2026

amadeus



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Amadeus Foreword

Unlocking Europe's tourism opportunities through data and partnership

In 2026, while travel across Europe carries its share of uncertainty due to the macro context, demand for European tourism continues to hold up well overall, and the patterns we see are best described as steady evolution rather than sudden change. Travelers are still coming — and while preferences have shifted, demand tends to redirect to stable areas rather than recede.

The latest figures reflect this picture. Comparing May 2025–April 2026 with the prior twelve months, European passenger traffic grew 2.3% year-over-year, hotel occupancy edged up by 2 percentage points, and ADR rose a further 7%. Taken together, we are seeing a sector that is growing modestly but consistently, with travelers adapting their choices in line with the global environment.

These gradual shifts — slightly different source markets, a broader spread of destinations, evolving booking habits — are meaningful precisely because they are unfolding within an otherwise familiar landscape. Reading them carefully helps destinations stay ahead of demand without overcorrecting and turn small signals into well-timed decisions.

At Amadeus, we believe data-driven insight is most valuable in moments like this, when the headline story is one of continuity but the details still matter. This report offers a clear view of the trends shaping European tourism today. Where are travelers coming from, how are they booking, and where is demand gently moving? Data can answer these questions to support strategic planning, day-to-day operations, and the search for new opportunities.

Amadeus is pleased to partner with UN Tourism to produce this report, a collaboration designed to support member destinations with comprehensive, industry-leading insights. We hope it provides a useful reference point: a way to read the year ahead with confidence and to welcome travelers well, whatever form their journeys take.

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

Sincerely,

Javier Campo,

SVP Europe, Hospitality, Amadeus

UN Tourism Foreword

When we launched the first edition of this report with Amadeus last year, the response from our Members and from the private sector settled one question: in a tourism landscape changing this fast, good data is no longer optional. Good decisions depend upon it.

Nowhere are the stakes clearer than in Europe, the world's largest tourism destination. In 2025, the region welcomed 809 million international arrivals, 53% of the global total. More telling, European destinations earned EUR 707 billion in tourism export revenue, up 8% on 2019 levels in real terms. Behind those figures are jobs, livelihoods and communities held together by travel.

This report is our second with Amadeus, one of our Affiliate Members. It tracks the signals shaping 2026, from destination searches to airline bookings and hotel occupancy, and shows where the market is heading.

My hope is a simple one: that it helps our Members see what is coming a little sooner, and act with the confidence to grow tourism in a way that lasts and that benefits more places, just not the familiar few. That is how a sector meets what is next rather than just reacting to it.

Shaikha Al Nuwais
Secretary-General UN Tourism

Methodology | data sources

All figures in this report are powered by Amadeus Travel Intelligence.

Data source	What it includes
Air traffic <i>Amadeus Traffic Analytics</i>	Estimated passengers flown — by origin and destination, routes, booked seats and how full flights are.
Flight schedules <i>Amadeus Schedule Analytics</i>	Worldwide airline capacity and flight schedules.
Flight searches <i>Amadeus Master Pricer</i>	Flight searches from online travel agencies, meta-search and other sellers — not from airlines' own sites.
Flight bookings <i>Processed MIDT</i>	Travel-agency passengers booked (online & offline) through any GDS, (online & offline) but excluding direct bookings.
Traveler profile	Who visits the destination — demographic and profile breakdown, where available.
Hotels <i>Amadeus Demand360</i>	Hotel occupancy and average room price (ADR), recent and looking ahead.

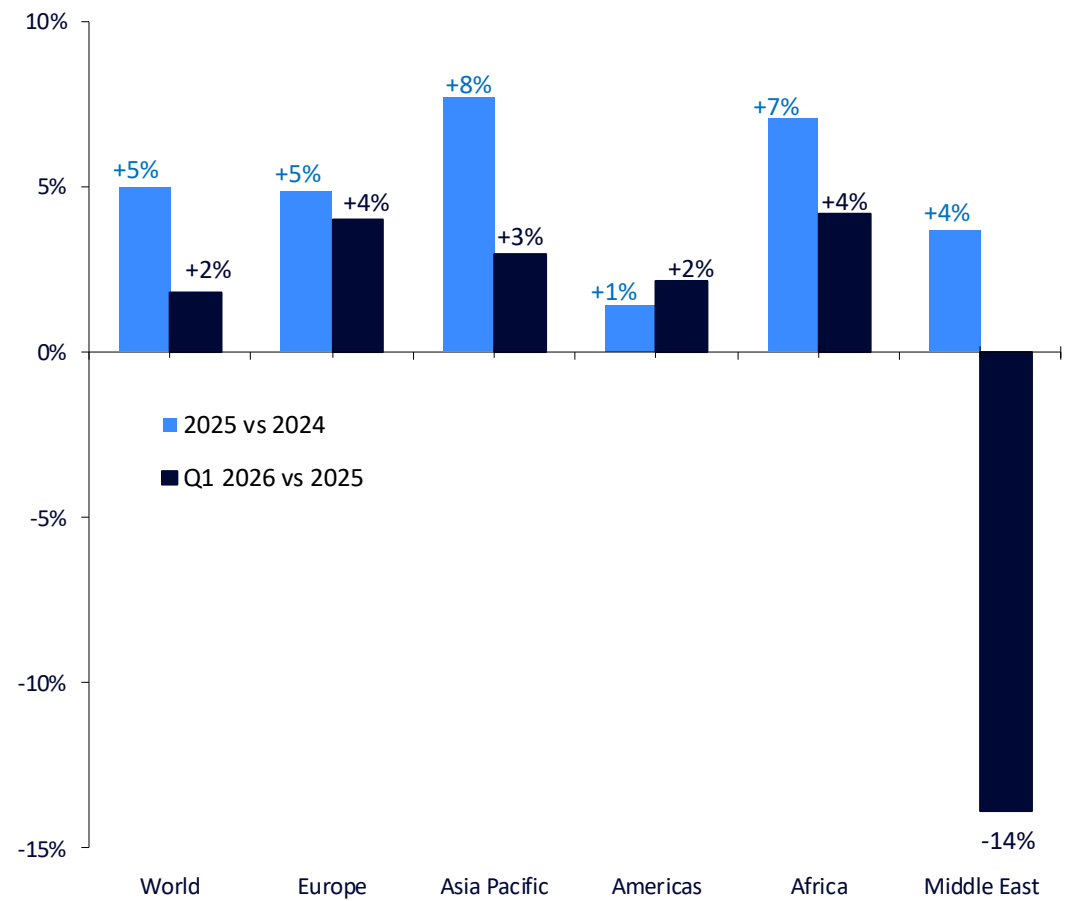
All figures are anonymized and aggregated. Each chart shows its exact reporting period.

Global Market Indicators



UN Tourism indicators

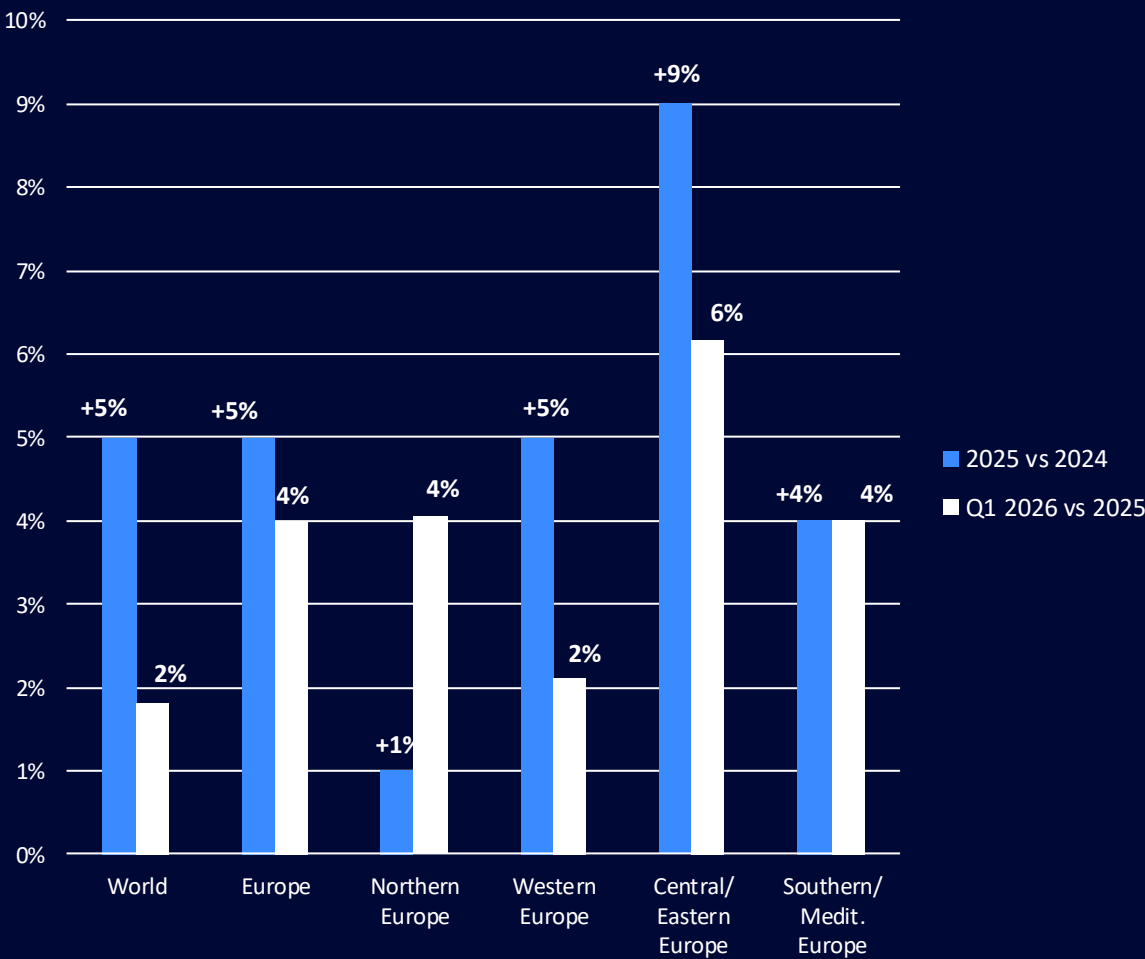
International tourist arrivals by region, 2025 and Q1 2026*
% change (year-on-year)



Source: World Tourism Organization (UN Tourism)
(Data as of May 2026)

* Provisional data

International tourist arrivals by subregion, 2025 and Q1 2026*
% change (year-on-year)



Source: World Tourism Organization (UN Tourism)
(Data as of May 2026)

* Provisional data

International tourism results January-March 2026

- International tourist arrivals (overnight visitors) grew 2% in the first quarter of 2026, despite disruption caused by the crisis in the Middle East in March.
- Some 307 million tourists travelled internationally in the first quarter of 2026, about 6 million more than in the same period of 2024.
- While the start of the year saw sustained demand overall (+2.5% cumulative growth in January and February), the Middle East conflict impacted performance in March (+0.4%).
- The conflict is expected to reduce growth in international arrivals by 1 to 2 percentage points below UN Tourism's initial forecast of 3% to 4% for 2026, depending on the conflict's duration and scope.
- By region, Europe and Africa saw strongest performance in the first quarter.
- Europe, the world's largest destination region, saw over 130 million international tourists in Q1 2026, a 4% increase, building on the strong momentum of 2025 (+5%). Some European destinations benefitted from the redirection of tourism flow in March. Southern Mediterranean Europe and Northern Europe both saw a 4% increase in arrivals in Q1 2026, while Central Eastern Europe (+6%) consolidated its rebound. Arrivals in Western Europe recorded 2% growth in Q1 2026.
- Africa saw a 4% increase in arrivals these first three months of 2026 compared to the same period of 2025, while Asia and the Pacific recorded 3% growth. In the Middle East international arrivals dropped 14% in Q1 2026, impacted by the conflict in the region.
- Monthly data on international tourism receipts show strong visitor spending in several destinations in the first quarter of 2026.
- The latest UN Tourism Confidence Index reflects cautiously positive prospects for the period May-August 2026, amid a challenging geopolitical environment. The Middle East crisis and rising travel costs among major concerns expressed by tourism experts.

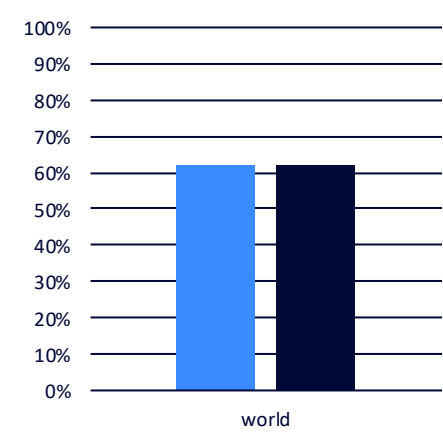
For more information please visit:

[World Tourism Barometer](#)

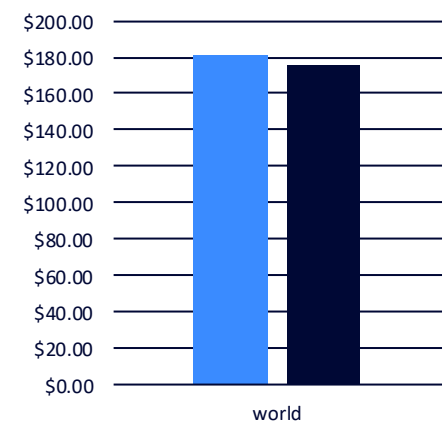
[UN Tourism Data Dashboard](#)

Hospitality market indicators

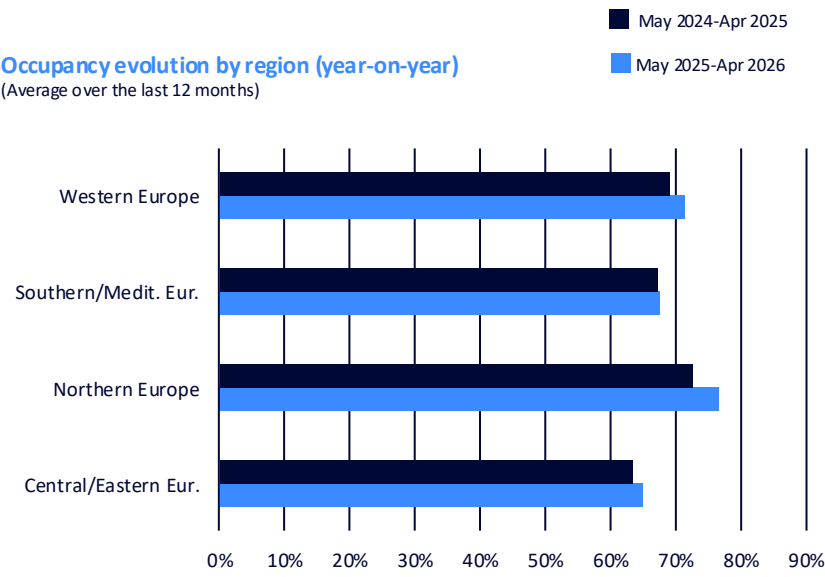
Occupancy evolution by year
(Average over the last 12 months in %)



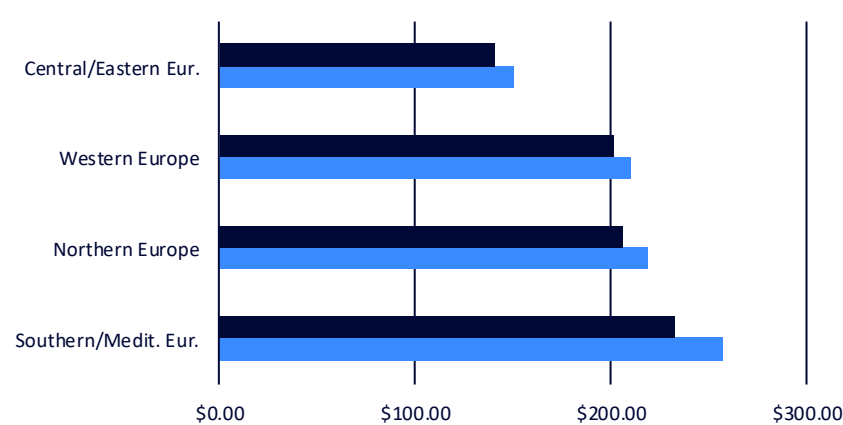
Average Daily Rate ("ADR") evolution by year
(Average over the last 12 months)



Occupancy evolution by region (year-on-year)
(Average over the last 12 months)

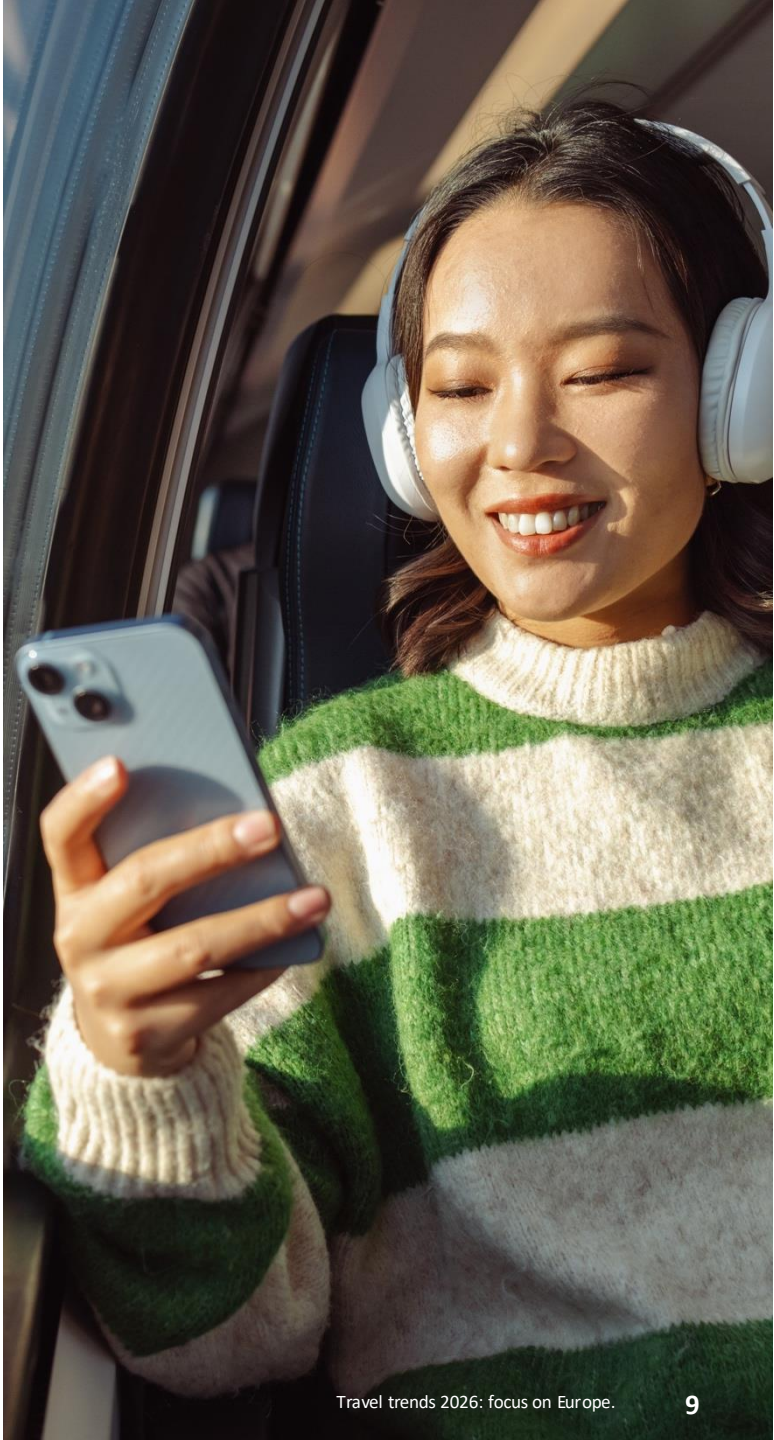


Average Daily Rate ("ADR") evolution by region (year-on-year)
(Average over the last 12 months)



Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2025

(1) Rev PAR: Revenue Per Available Room, calculated as Occupancy multiplied by Average Daily Rate



Europe

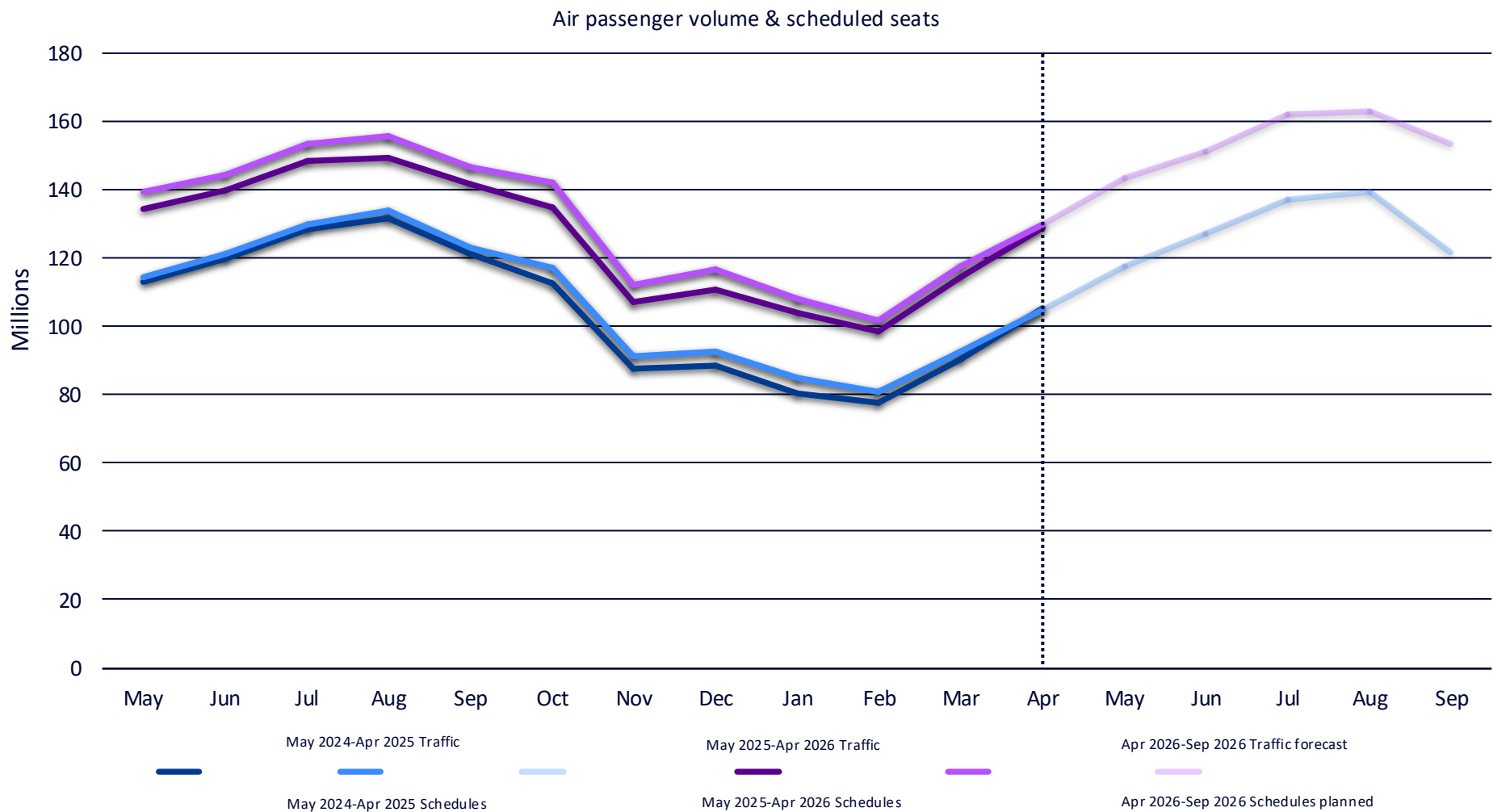


Air Travel Overview



Worldwide to Europe

Passenger traffic and capacity



2.3%

year-on-year growth
in passenger traffic

Passenger traffic to Europe continues to grow at a measured pace, with volumes increasing in line with planned capacity. Seat deployment into summer 2026 suggests airlines are maintaining a balanced supply approach, focused on supporting demand levels rather than driving accelerated growth across the region.

Where do visitors come from?

Reality vs. aspirations

Top origin markets **searching** for Europe

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
United States	1	1
United Kingdom	2	2
Germany	3	3
Spain	5	4
Italy	4	5
France	6	6
China	7	7
Türkiye	8	8
Canada	11	9
Poland	9	10

Top origin markets **traveling** to Europe*

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
United States	1	1
Spain	2	2
Germany	3	3
Italy	4	4
Kazakhstan	6	5
France	5	6
United Kingdom	7	7
Norway	8	8
India	9	9
Sweden	11	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



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

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

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Russian Federation	1	85%
Japan	2	62%
Saudi Arabia	3	56%
Thailand	4	49%
Republic of Korea	5	42%
China	6	41%
United States	7	37%
Canada	8	33%
India	9	33%
Portugal	10	28%

Top origin markets **traveling** to Europe* with the highest growth (among the TOP 30)

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Japan	1	19%
Denmark	2	11%
Egypt	3	8%
Algeria	4	5%
Morocco	5	5%
Australia	6	4%
Poland	7	4%
Spain	8	4%
Kazakhstan	9	3%
Norway	10	3%

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



Where do people travel to in Europe?

Reality vs aspirations

Top **searched** destinations in Europe

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Spain	1	1
United Kingdom	2	2
Italy	3	3
France	4	4
Germany	5	5
Türkiye	6	6
Greece	7	7
Portugal	8	8
Netherlands	9	9
Poland	10	10

Top **booked** destinations in Europe*

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Spain	1	1
Italy	3	2
France	4	3
United Kingdom	2	4
Germany	5	5
Kazakhstan	8	6
Türkiye	6	7
Portugal	7	8
Norway	9	9
Greece	10	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



Top performing destinations in Europe

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Uzbekistan	1	64%
Russian Federation	2	60%
Israel	3	46%
Kazakhstan	4	40%
Switzerland	5	36%
Sweden	6	36%
Denmark	7	34%
Ireland	8	33%
Belgium	9	32%
Norway	10	31%

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Czechia	1	18%
Iceland	2	11%
Denmark	3	8%
Kazakhstan	4	6%
Norway	5	5%
Finland	6	5%
Israel	7	5%
Sweden	8	4%
Spain	9	1%

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Air Travel overview analysis

Capacity expansion is broad-based across all European subregions

Available seats to Europe are increasing across every UN Tourism subregion — Central/Eastern at +6%, Southern/Mediterranean at +5%, and Northern and Western both at +2%, alongside 2.3% YoY passenger traffic growth. This synchronized expansion gives destinations a confident runway across the entire continent.

Japan stands out as the clearest converter of interest into trips

Japan posted 62% search growth alongside 19% booking growth — the standout Top 30 origin converting rising interest into actual visits at meaningful scale. Destinations can confidently court this high-conversion audience with targeted campaigns and dedicated route promotion.

Long-haul search momentum opens fresh route and campaign opportunities

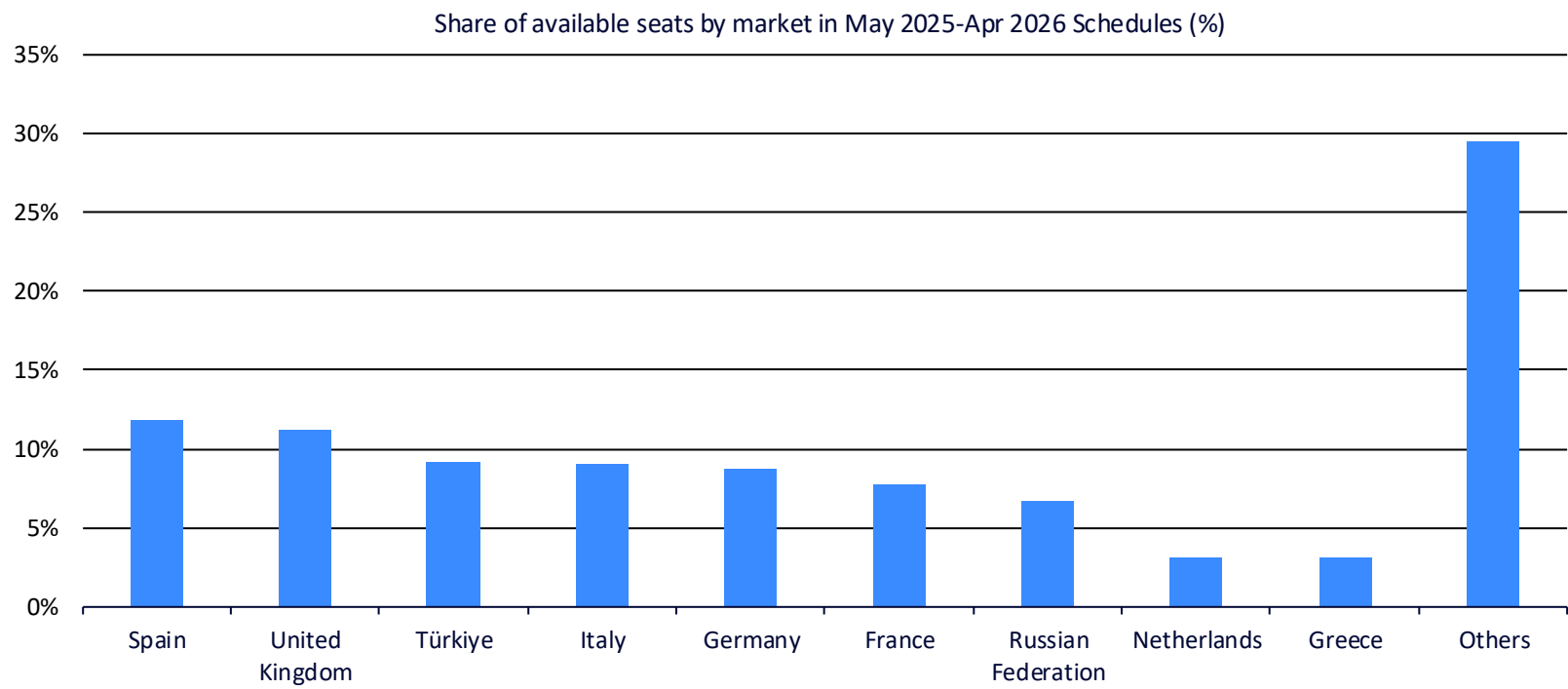
Search interest from Russian Federation (+85%), Japan (+62%) and Saudi Arabia (+56%) is rising sharply within the Top 30, joined by Thailand, Republic of Korea, China and the United States all above +37%. This visible long-haul interest gives destinations clear targets for new route partnerships and tailored content.

Searched-destination growth spans Europe's full geographic and cultural breadth

Top search growth among European destinations was led by Uzbekistan (+64%), the Russian Federation (+60%) and Israel (+46%), joined by Kazakhstan, Switzerland, Sweden, Denmark, Ireland, Belgium and Norway all in the +30-40% range. Caucasus, Alpine and Nordic destinations alike are gaining momentum.



Share of available seats in flights to Europe



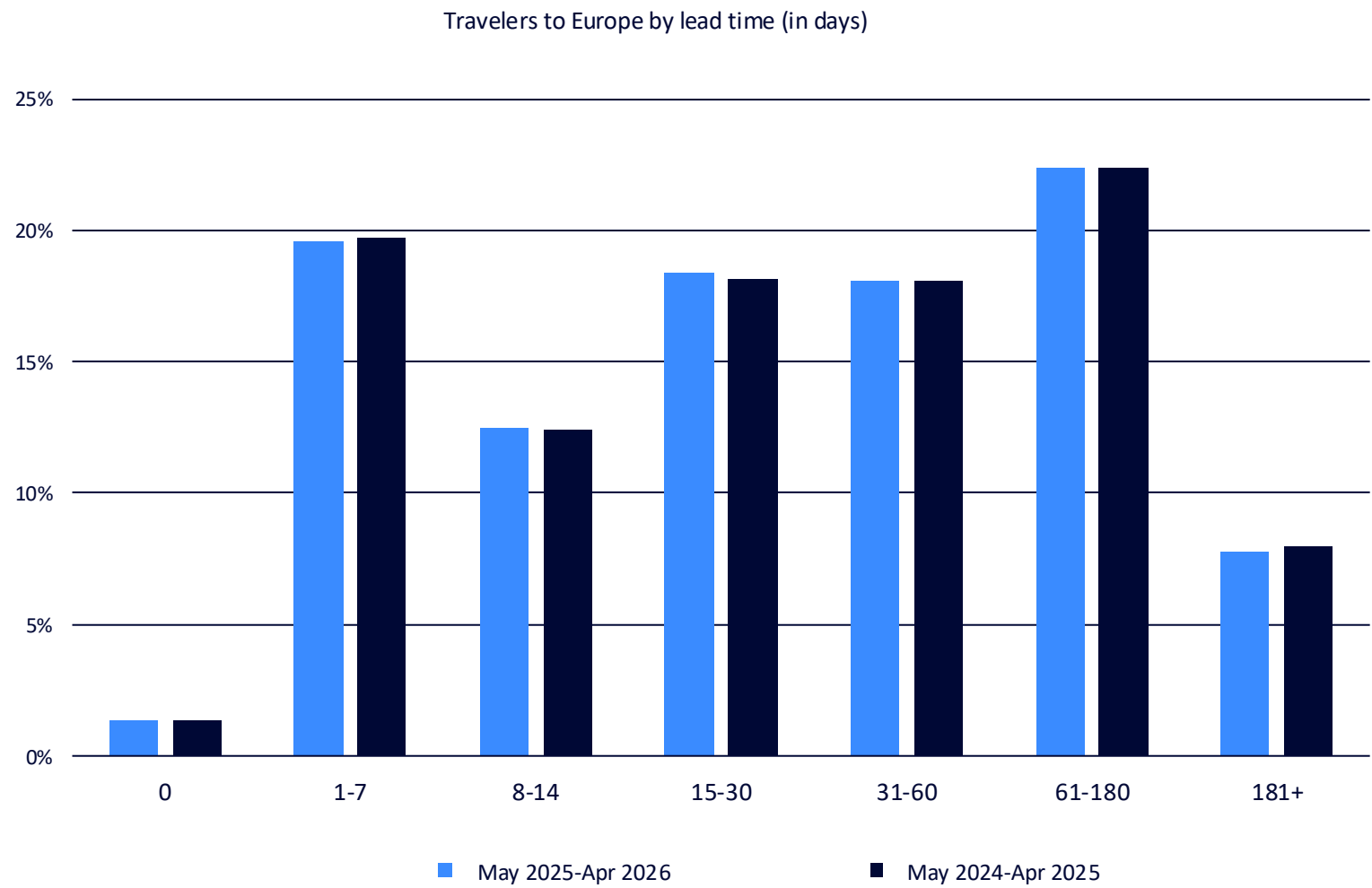
YoY* Capacity by subregion

UN Tourism subregion	YoY Growth
Central/Eastern Europe	6%
Southern/Mediterranean Europe	5%
Northern Europe	2%
Western Europe	2%

* May 2025-Apr 2026 vs May 2024-Apr 2025

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026

Air Travel Bookings to Europe by Lead Time



Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026

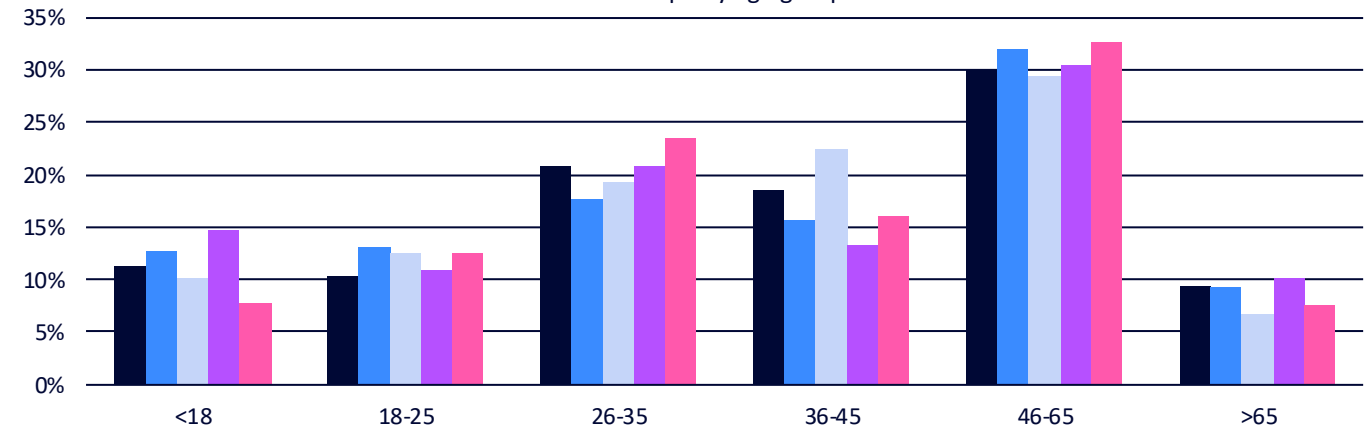




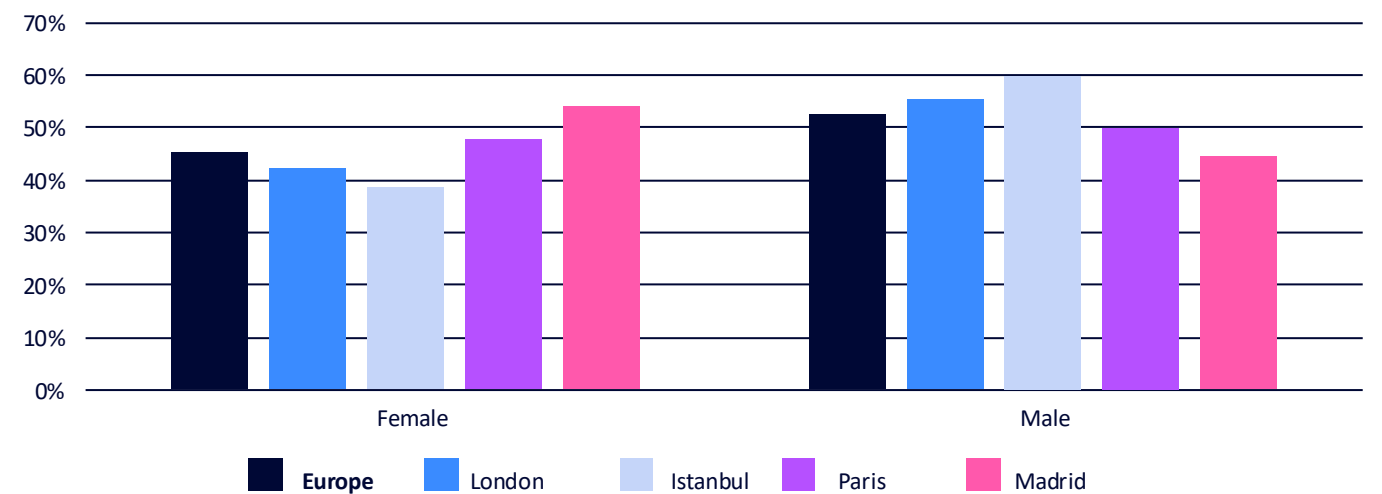
What type of Travelers travel to Europe

Top destinations

Travelers to Europe by age groups



Travelers to Europe by gender



Lead time, profile and connectivity analysis

Lead-time patterns are virtually unchanged YoY, offering destinations a stable planning canvas

Across every booking window, the 2025-26 share matches 2024-25 within fractions of a percent. The 31+ day window now represents ~48% of bookings, giving destinations a predictable runway to optimize strategies and marketing pushes ahead of peak demand.

Long-lead bookings hold steady, supporting confident forward planning

The 181+ day window remained stable at ~8% of all bookings YoY, while 61-180 day bookings held firm at ~22%. This consistency in early-decision behavior gives destinations a reliable horizon for capacity planning and early-season campaigns.

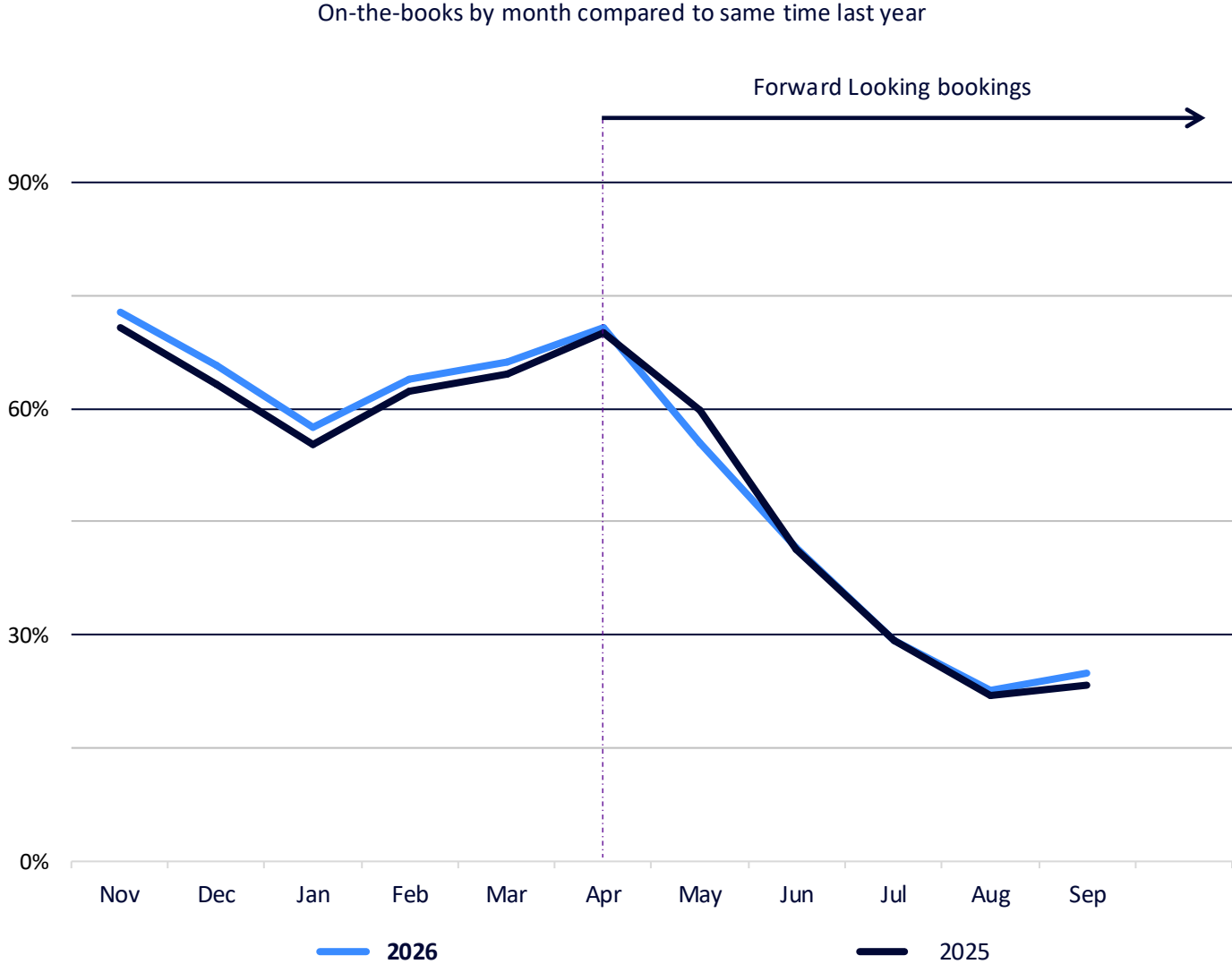
Travelers aged 46-65 anchor European city demand at ~30%

The 46-65 age group leads the visitor mix across Madrid, Paris, London and Istanbul, peaking at ~33% in Madrid and ~32% in London. This mature, high-spending audience is well aligned with premium experiences and cultural offerings, while younger groups still hold meaningful share to support a multigenerational visitor mix.

Hospitality Occupancy Overview



Hotel Occupancy in Europe

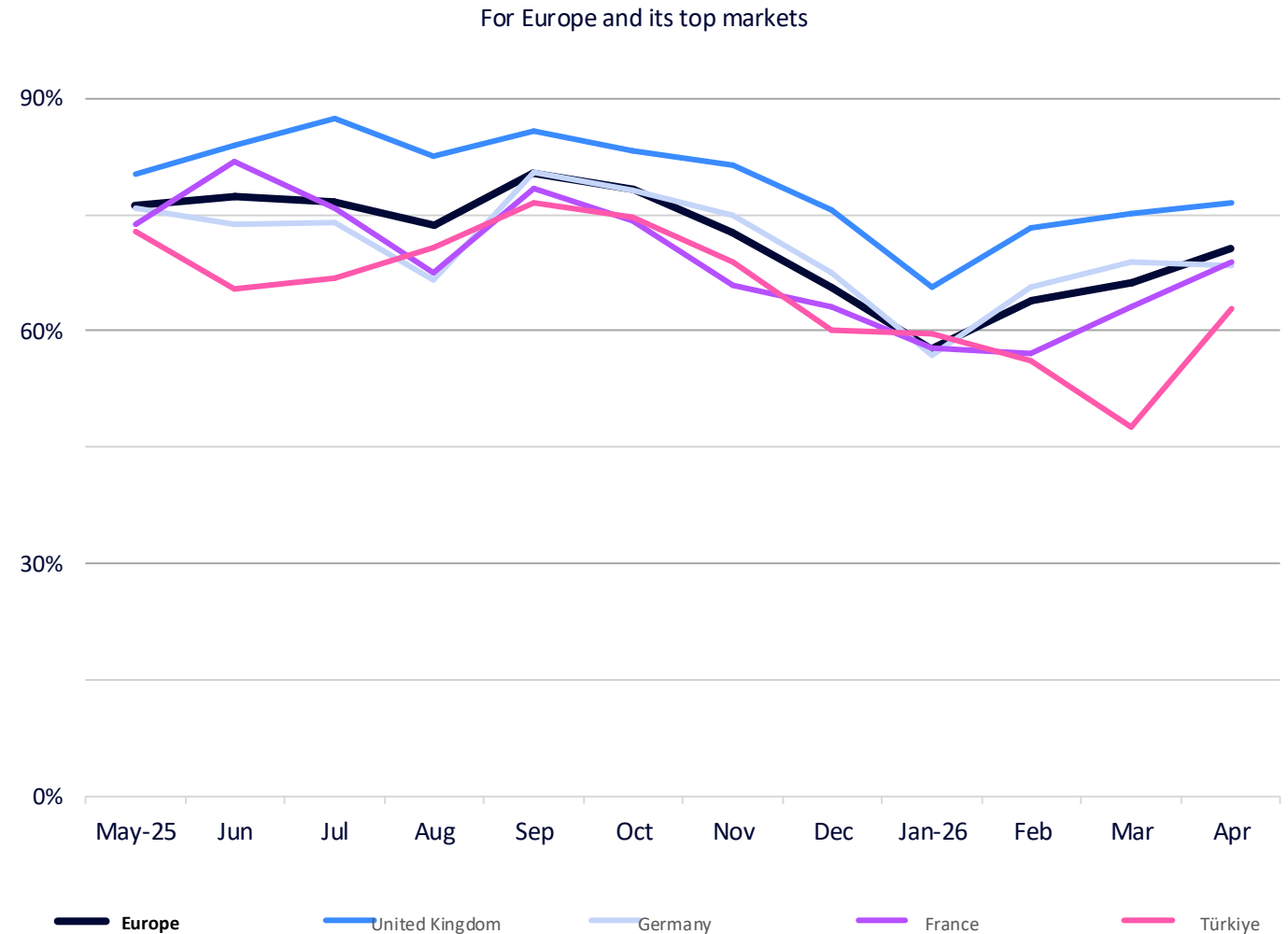


Source: Amadeus Destination Gateway® as of Sunday, 3 May 2026



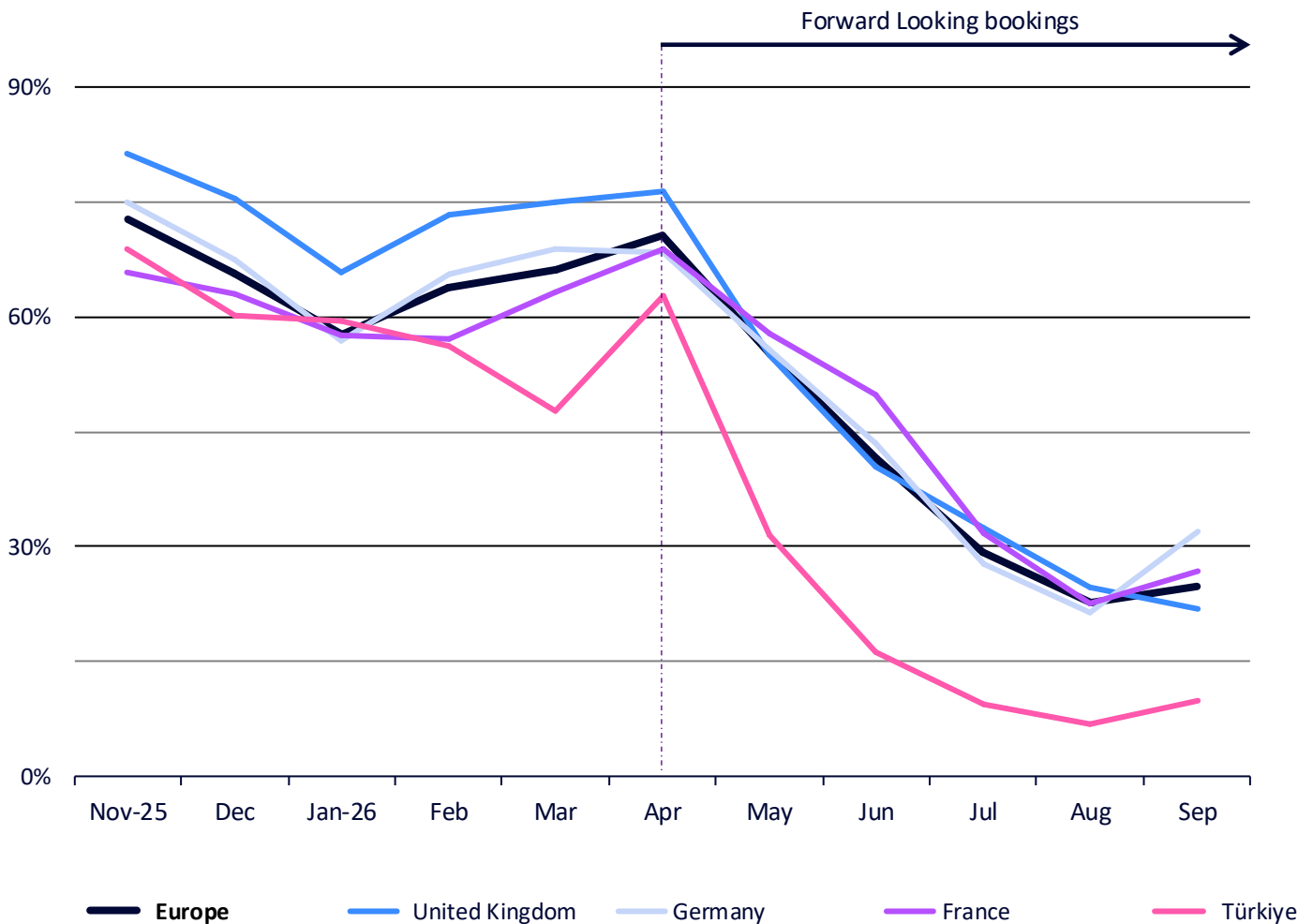


Hotel Occupancy for the past 12 months



Hotel Occupancy On-the-Books

For Europe and its top markets

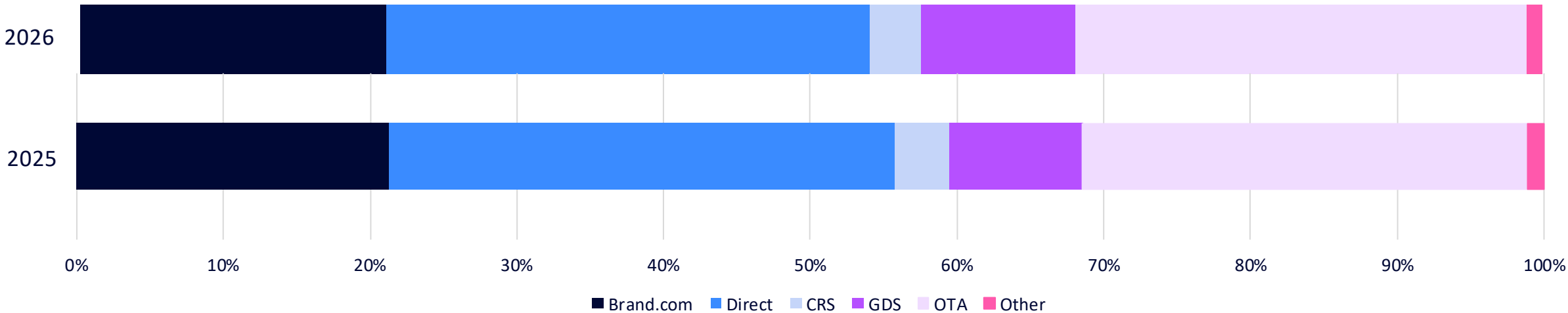


Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



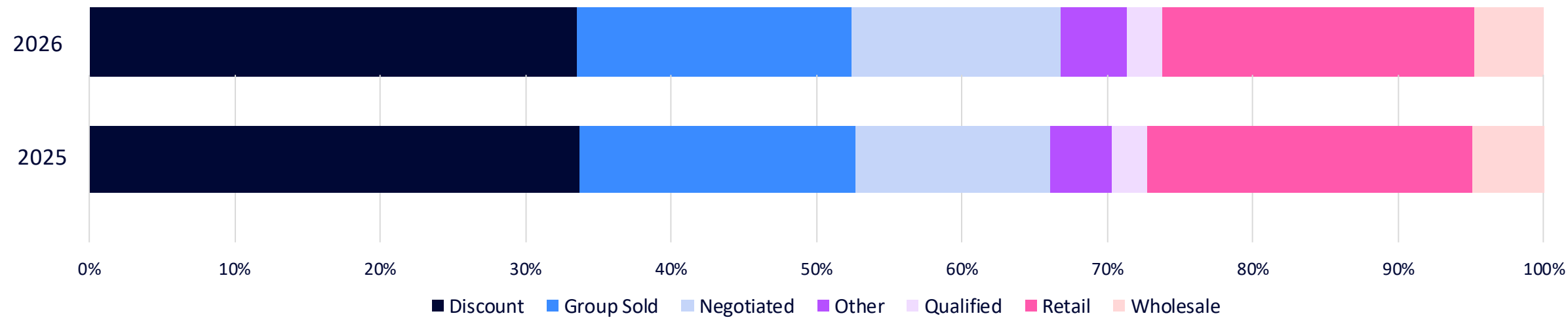
Hotel Channel mix in Europe

On-the-books distribution for May 2026 vs May 2025

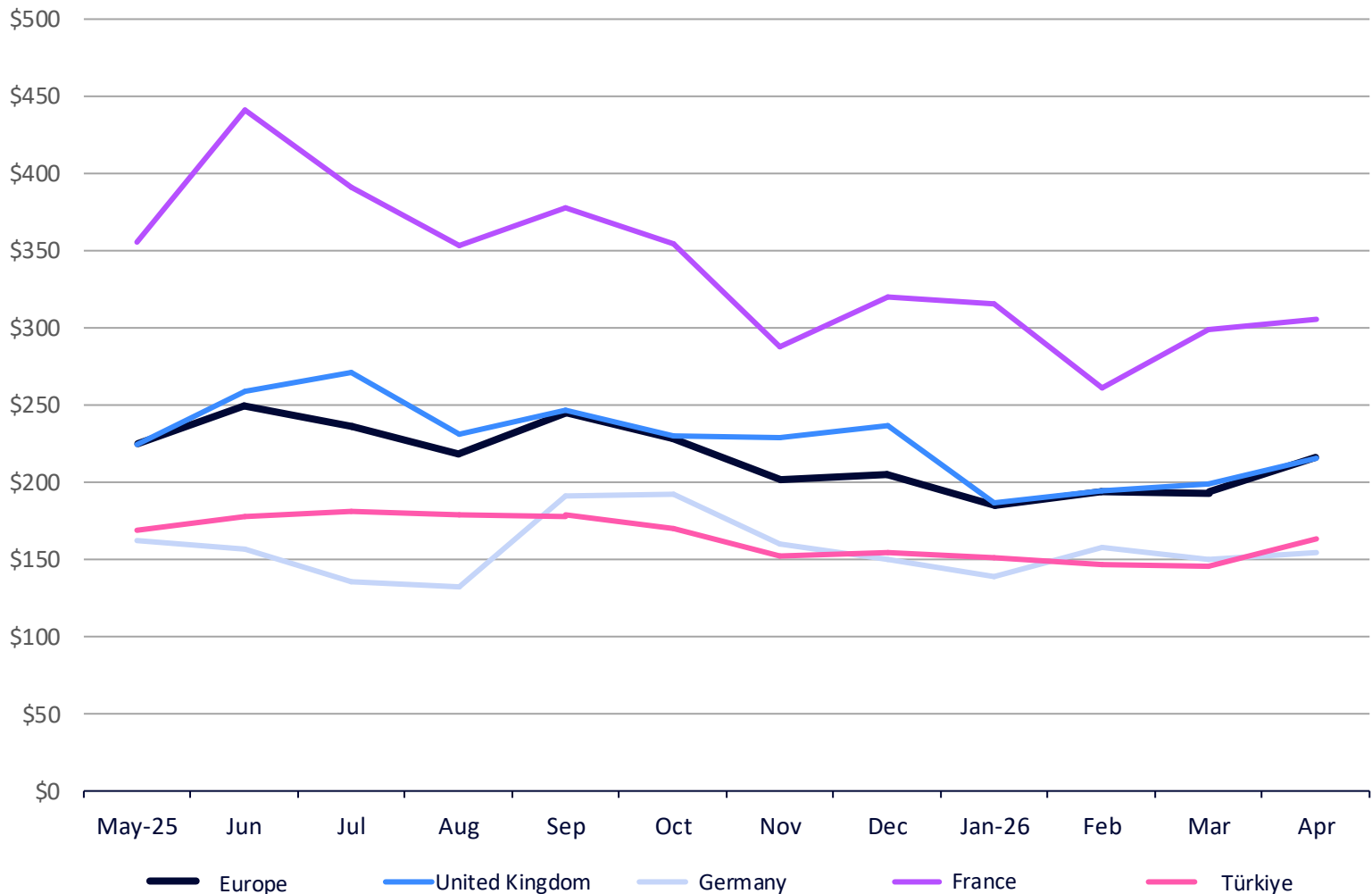


Hotel Segmentation in Europe

On-the-books distribution for May 2026 vs May 2025



Average Daily Rate (ADR) in USD



Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



Occupancy overview analysis

Hotel occupancy peaked at ~80% in September 2025, with strong consistency through summer

Europe-wide occupancy held at or above 73% from May through October 2025, peaking at ~80% in September. This consistent high-season window gives destinations a reliable runway for revenue optimization and high-impact campaigns across the region.

United Kingdom leads peak-season occupancy among Europe's top markets

The United Kingdom reached 87% occupancy in July 2025, with France at 82% in June and Germany at 81% in September. This top-market strength reinforces Europe's standing as a premier hospitality region across summer demand peaks, with Türkiye also delivering a healthy 76% peak in September.

Forward-looking bookings are tracking ahead during summer 2026

On-the-books occupancy for September 2026 stands at 25% vs 22% — early signals of good booking pace heading to summer.

ADR holds firm at ~\$215 region-wide, with France commanding premium summer pricing

Average daily rate averaged ~\$215 across Europe over the past 12 months, peaking at \$249 in June, with France leading top markets at \$441 in June and \$391 in July. Stable, premium-anchored pricing gives destinations room to innovate around value, experience and tiered premium offers.

Central/Eastern Europe

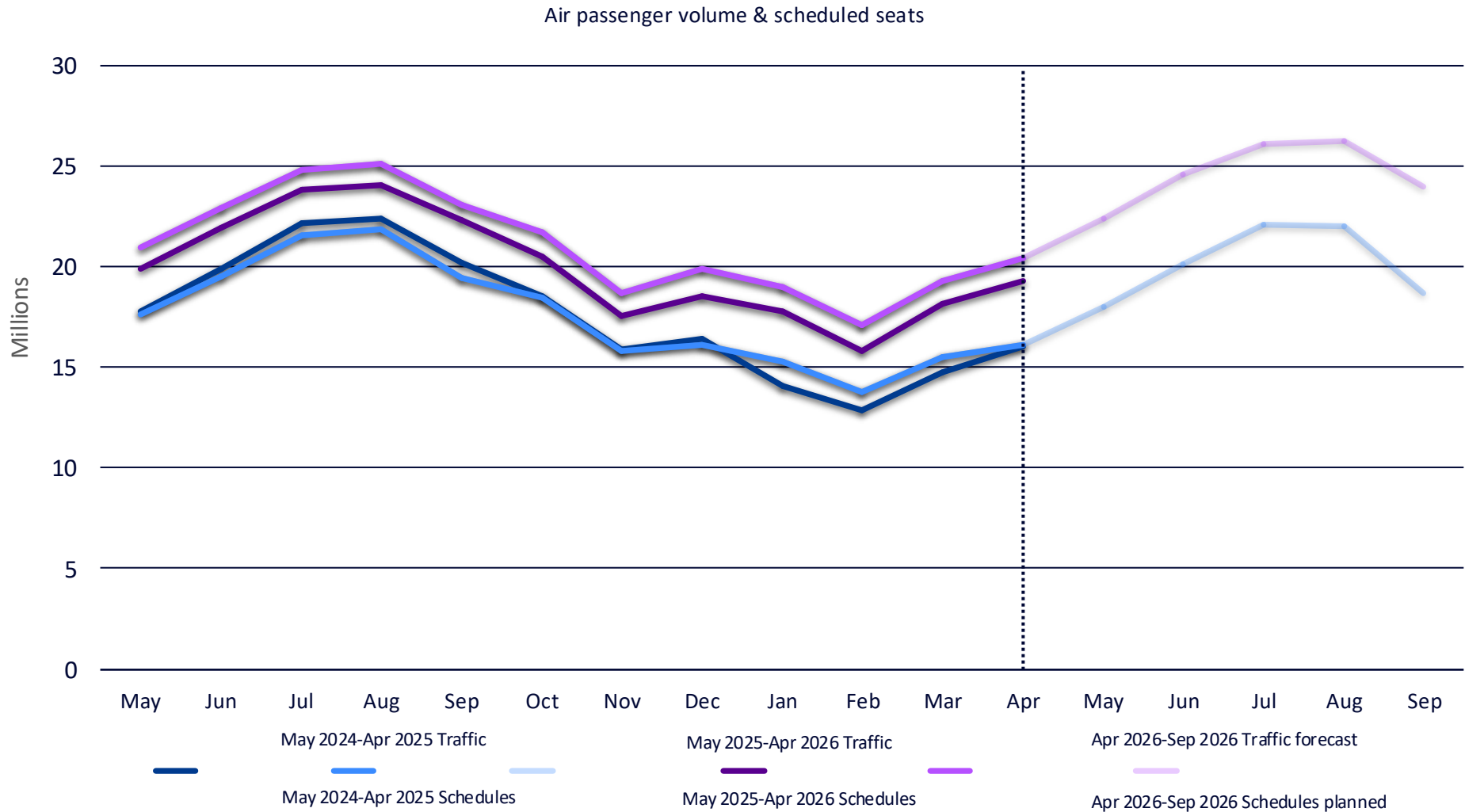


Air Travel Overview



Worldwide to Central/Eastern Europe

Passenger traffic and capacity



Travel demand to Central/Eastern Europe remains well-matched with airline capacity, and the planned seat expansion in early 2026 underscores carrier confidence in the market. This alignment sets the stage for destinations across the region to achieve stable, long-term growth.

Where do visitors come from?

Reality vs. aspirations

Top origin markets **searching** for Central/Eastern Europe

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Russian Federation	3	1
United Kingdom	1	2
China	5	3
Italy	4	4
Germany	2	5
United States	6	6
Spain	7	7
Türkiye	8	8
Kazakhstan	10	9
France	9	10

Top origin markets **traveling** to Central/Eastern Europe*

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Kazakhstan	1	1
United States	2	2
Germany	3	3
Türkiye	4	4
Israel	5	5
France	7	6
Russian Federation	6	7
China	10	8
Spain	12	9
India	14	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



Are travelers from these markets to Central/Eastern Europe already on your radar?

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

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Russian Federation	1	107%
Japan	2	67%
Saudi Arabia	3	61%
Republic of Korea	4	52%
Uzbekistan	5	50%
Thailand	6	46%
China	7	38%
Portugal	8	38%
United States	9	37%
Greece	10	34%

Top origin markets **traveling** to Central/Eastern Europe* with the highest growth (among the TOP 30)

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
China	1	29%
India	2	20%
Denmark	3	18%
Georgia	4	18%
Saudi Arabia	5	13%
Spain	6	11%
Republic of Korea	7	10%
Sweden	8	10%
Vietnam	9	7%
Belgium	10	7%

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026





Where do people from Central/Eastern Europe travel to?

Reality vs aspirations

Top **searched** destinations in Central/Eastern Europe

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Poland	1	1
Russian Federation	2	2
Hungary	3	3
Czechia	5	4
Romania	4	5
Kazakhstan	6	6
Uzbekistan	9	7
Georgia	7	8
Bulgaria	8	9
Azerbaijan	10	10

Top **booked** destinations in Central/Eastern Europe*

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Kazakhstan	1	1
Poland	2	2
Russian Federation	3	3
Romania	4	4
Czechia	5	5
Azerbaijan	6	6
Hungary	7	7
Uzbekistan	8	8
Georgia	9	9
Bulgaria	10	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Top performing destinations in Central/Eastern Europe

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Uzbekistan	1	64%
Tajikistan	2	64%
Russian Federation	3	60%
Moldova	4	51%
Slovakia	5	44%
Kazakhstan	6	40%
Armenia	7	33%
Latvia	8	33%
Czechia	9	31%
Georgia	10	30%

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking
Belarus	1
Czechia	2
Slovakia	3
Tajikistan	4
Estonia	5
Georgia	6
Latvia	7
Kazakhstan	8
Russian Federation	9
Poland	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Air Travel overview analysis

A stable origin mix anchors with a dependable demand base

The top 5 booked source markets —Kazakhstan, United States, Germany, Türkiye and Israel — held their exact ranking year-on-year, while overall passenger traffic edged up 0.2% in line with planned capacity. This consistency lets destinations confidently lock in long-term marketing and air-service strategies around proven demand.

Long-haul search momentum signals fresh opportunity

Searches from the Russian Federation (+107%), Japan (+67%) and Saudi Arabia (+61%) surged within the Top 30 origin markets, with the Republic of Korea (+52%) and Uzbekistan (+50%) close behind. China now leads booked-origin growth at +29% (and is up +38% in searches), showing genuine conversion potential beyond traditional source markets.

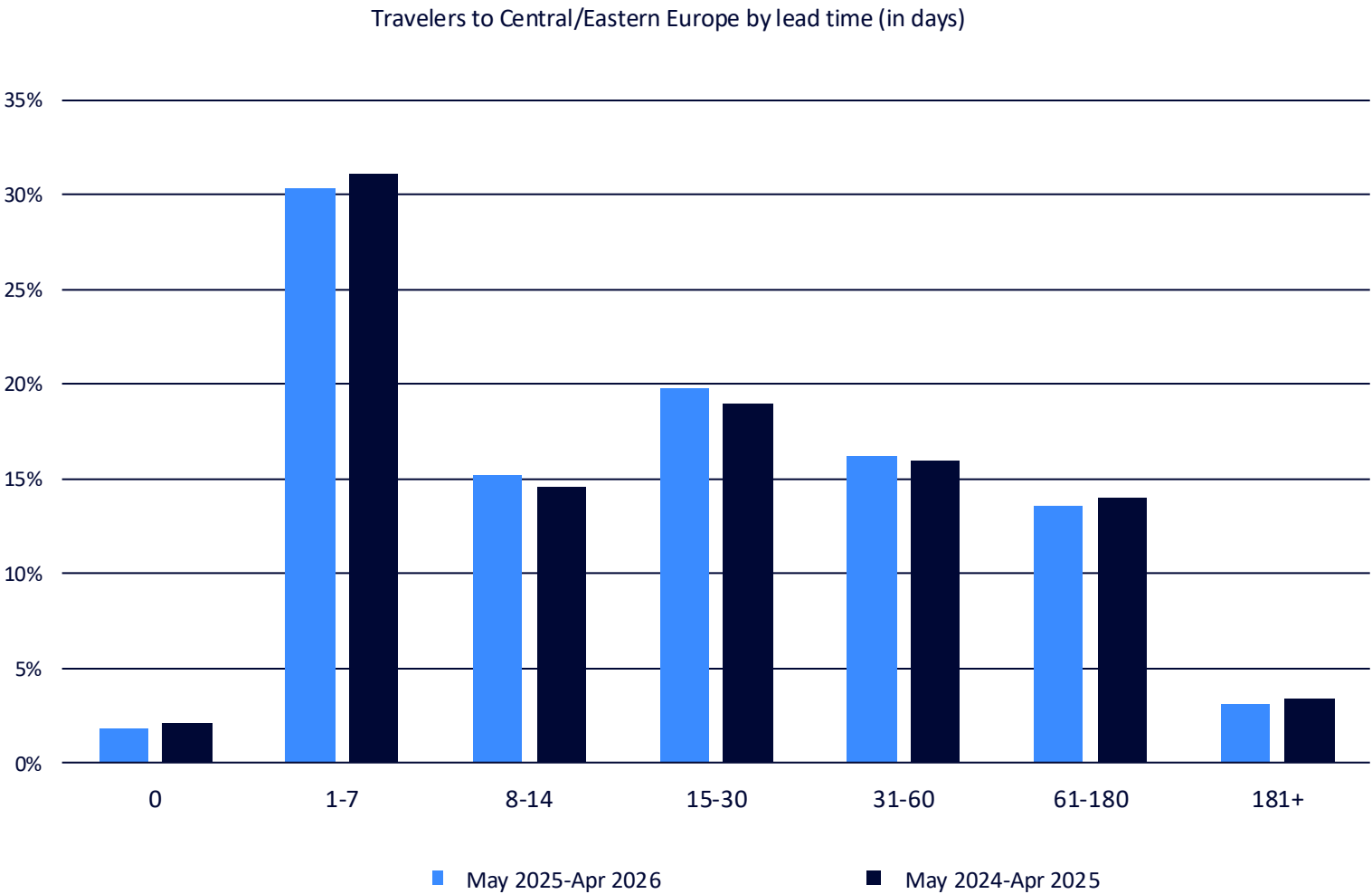
Search interest broadens toward a wider set of destinations across the subregion

Searches for Uzbekistan (+64%), Tajikistan (+64%), Moldova (+51%), Slovakia (+44%) and Kazakhstan (+40%) are climbing fast — yet booked-destination growth is led by Belarus (+16%) and Czechia (+9%), with these high-search markets not yet converting at the same pace. This points to a clear search-to-visit conversion opportunity for off-the-beaten-path, culturally rich travel.

Czechia leads destination growth on both searches and bookings

Among the Top 30 destinations, Czechia leads on both fronts (+31% searches, +9% bookings) and climbed in the searched ranking (from #5 to #4), alongside Uzbekistan (#9 → #7), pointing to renewed appetite for city-break and culturally distinct destinations across the subregion. This consistent interest gives these markets room to develop differentiated positioning and build on growing visitor engagement.

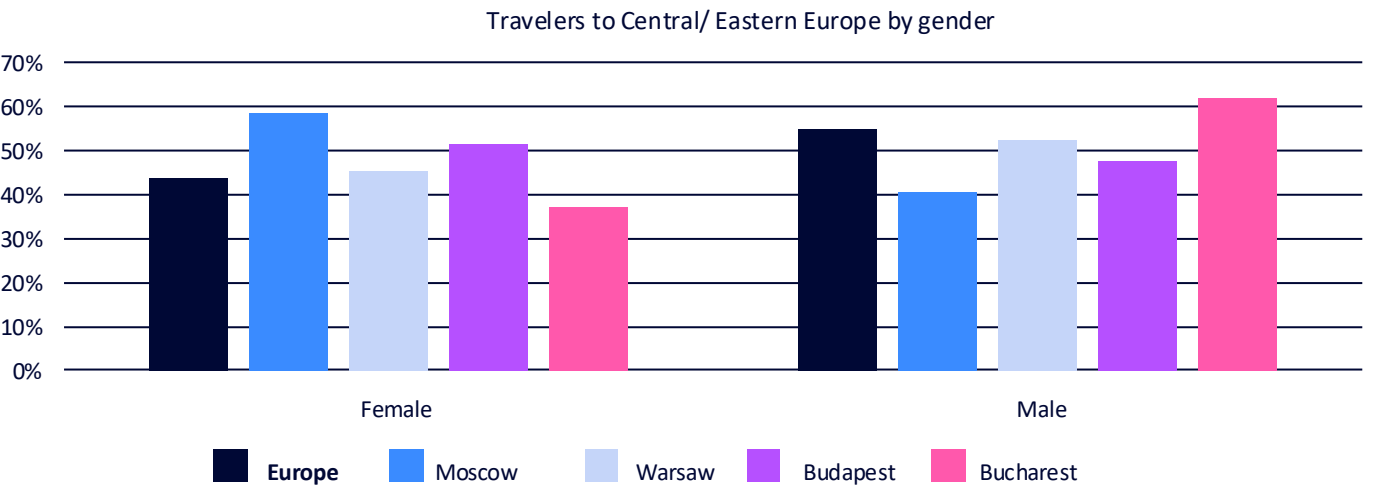
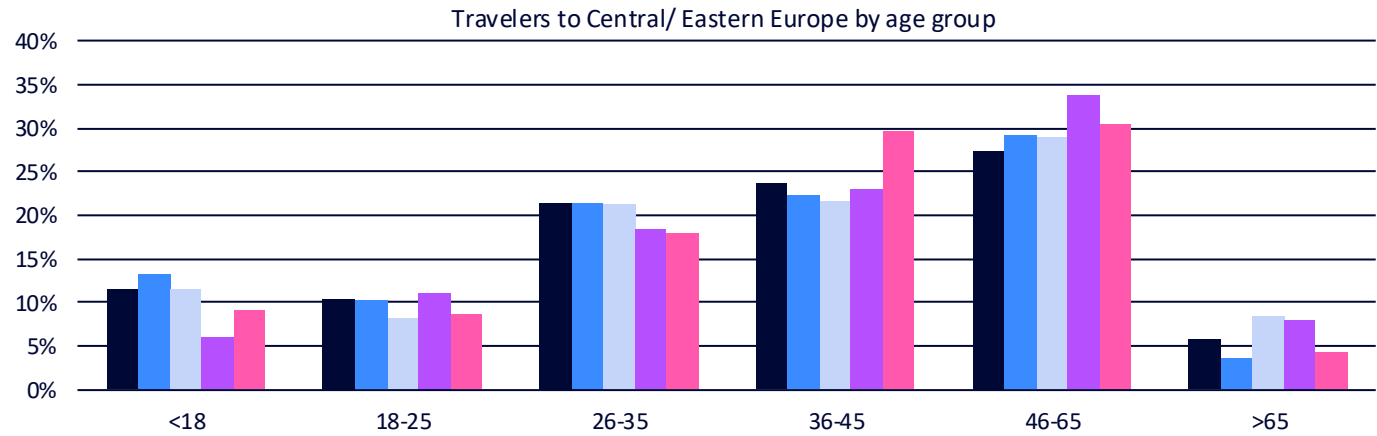
Air Travel Bookings to Central/Eastern Europe by Lead Time





What type of Travelers travel to Central/ Eastern Europe

Top destinations



1052 new routes in Central/Eastern Europe

Top new international routes (based on seat capacity)

Origin market	New routes
Italy	54
Russian Federation	50
Germany	43
Spain	41
China	33
Türkiye	32
Uzbekistan	32
Egypt	29
Kazakhstan	27
Vietnam	24
France	23
United Arab Emirates	18

New routes	Origin market	Destination market
EVN-KRR	Armenia	Russian Federation
KRR-EVN	Russian Federation	Armenia
BCN-BTS	Spain	Slovakia
AUH-WAW	United Arab Emirates	Poland
AUH-PRG	United Arab Emirates	Czechia
IST-KRR	Türkiye	Russian Federation
NHA-SVX	Vietnam	Russian Federation
SOF-KRK	Bulgaria	Poland
KRK-SOF	Poland	Bulgaria
SOF-WMI	Bulgaria	Poland
WMI-SOF	Poland	Bulgaria
BUD-VNO	Hungary	Lithuania



Lead time, profile and connectivity analysis

Booking lead times split into two clear opportunity windows

Roughly ~33% of bookings to Central/Eastern Europe are made 31+ days ahead, with the long-runway and 1-7 day windows both growing year-on-year. This dual-peak pattern lets destinations run forward-loaded campaigns for committed planners alongside flash offers for spontaneous Travelers.

Mature, high-spend Travelers anchor the regional visitor mix

The 46-65 age group leads with ~27% share, with 36-45s close behind at ~24%. Together these higher-spending life stages account for over half of all visits, supporting premium positioning, longer stays and culture-led experience packages.

Connectivity expansion broadens the region's reach for new visitor flows

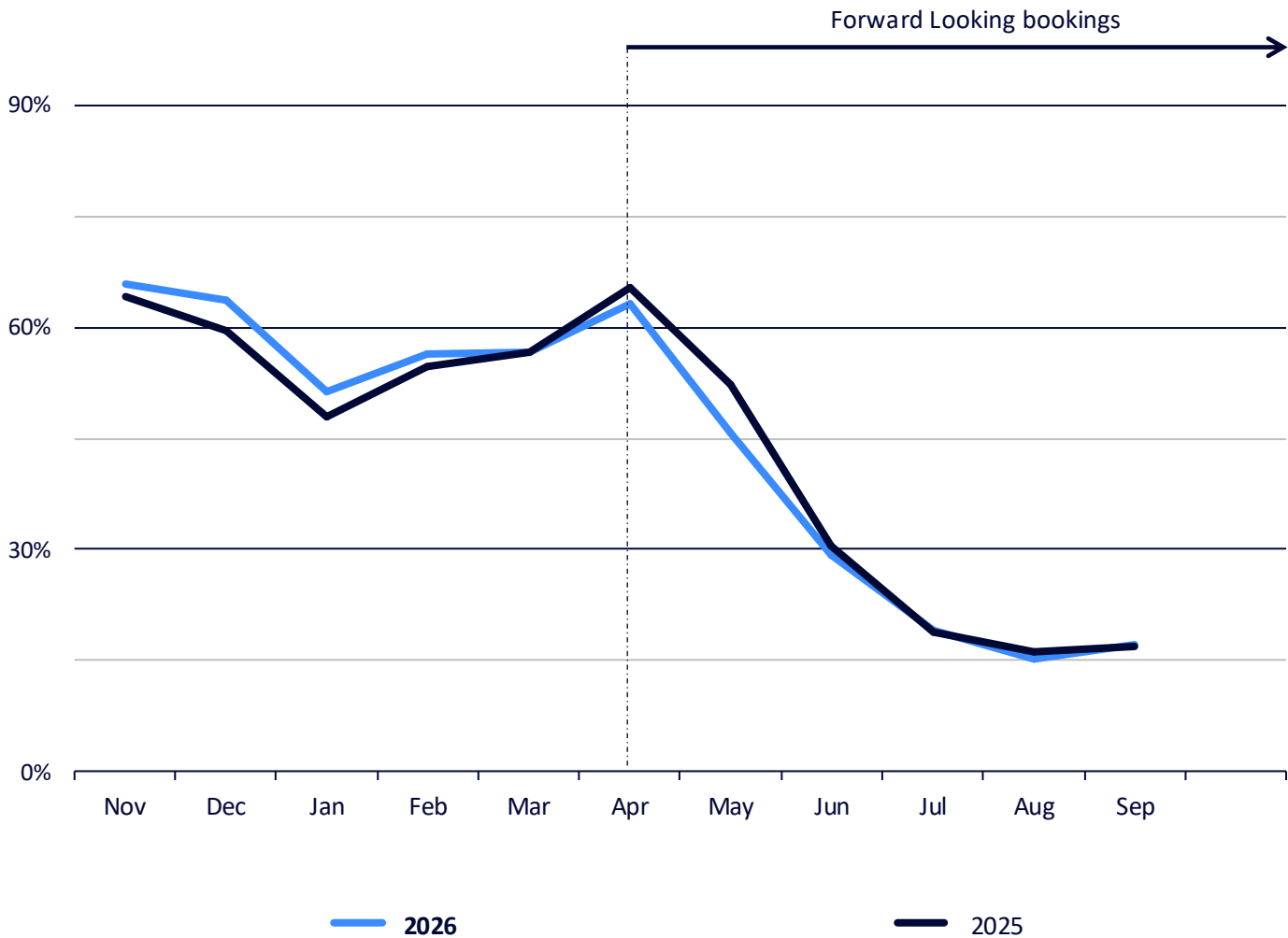
A total of 1,052 new international routes launched across Central/Eastern Europe over the past year, alongside stable passenger traffic and rising planned capacity for early 2026 — opening fresh gateways for both core and high-growth source markets.

Hospitality Occupancy Overview



Hotel Occupancy in Central/Eastern Europe

On-the-books by month compared to same month last year



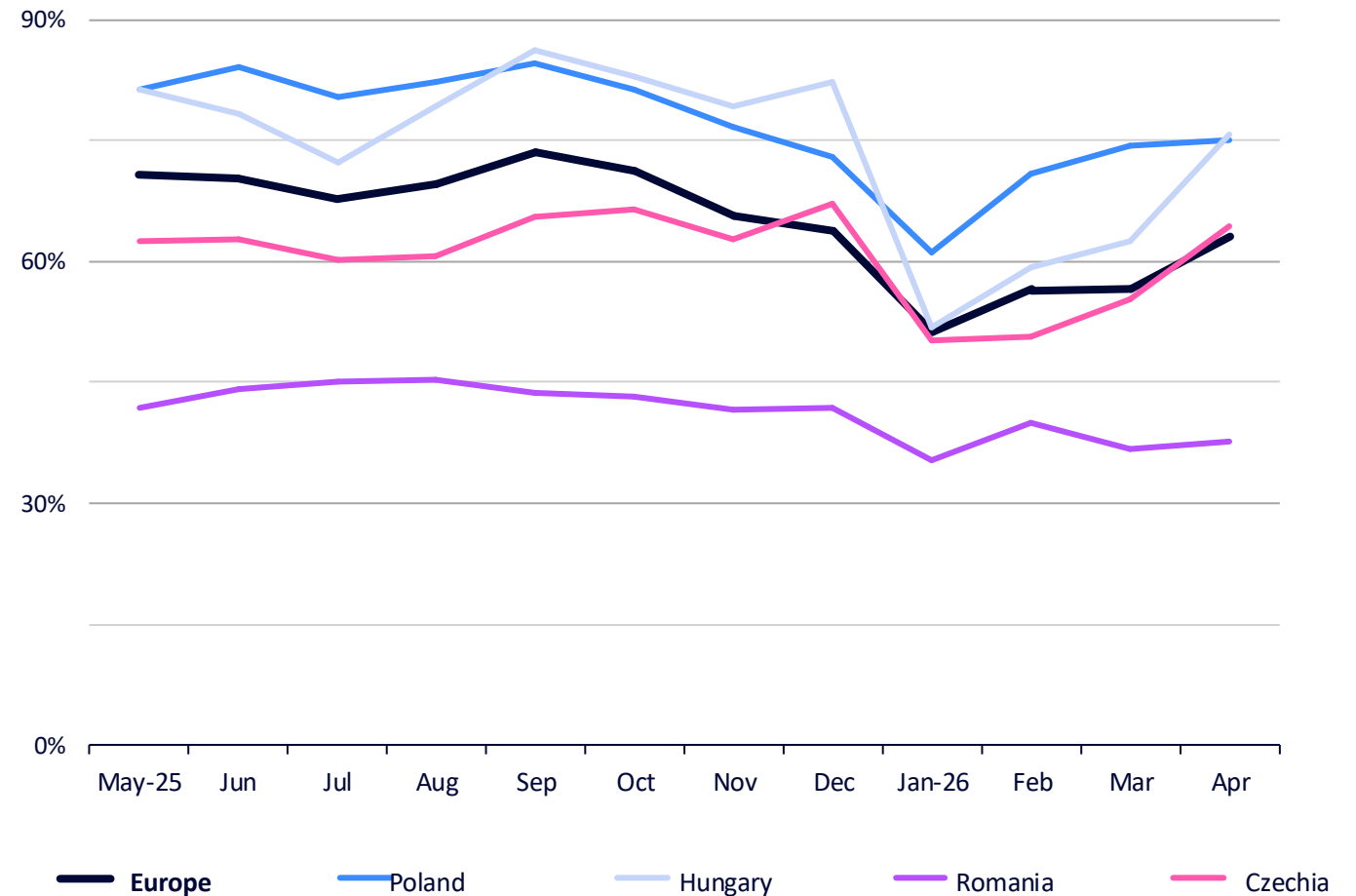
Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026





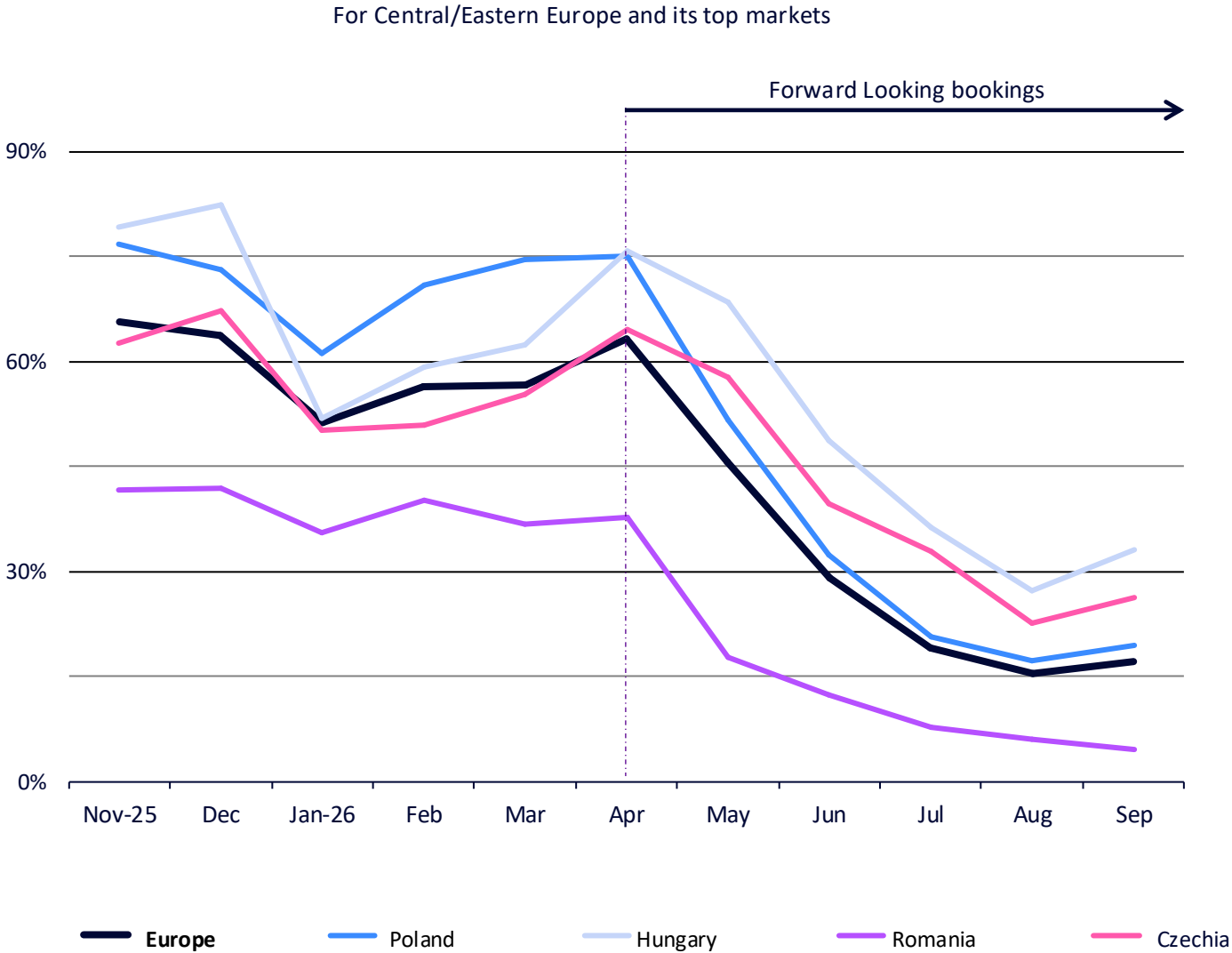
Hotel Occupancy for the past 12 months

For Central/Eastern Europe and its top markets



Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026

Hotel Occupancy On-the-Books

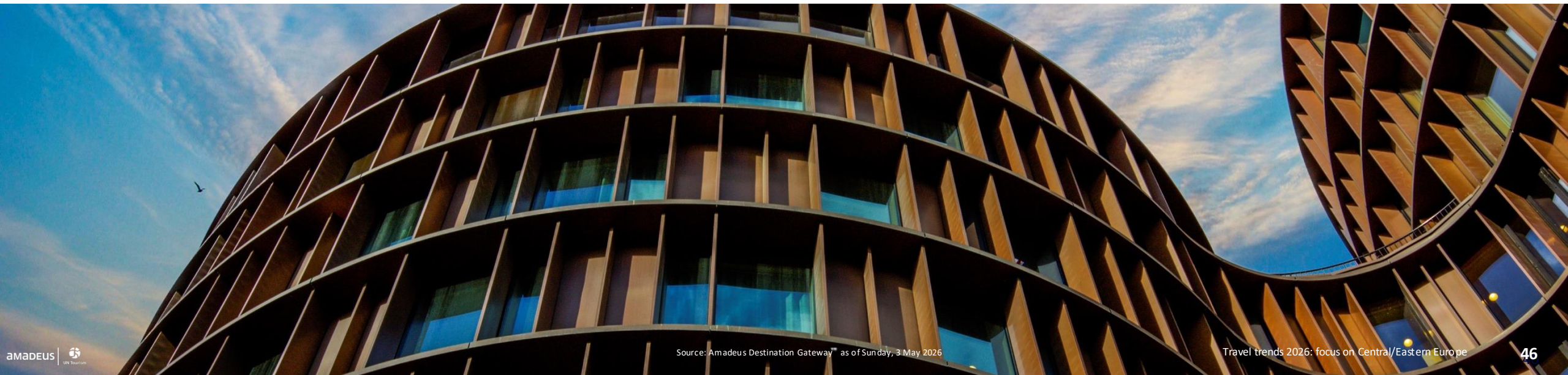
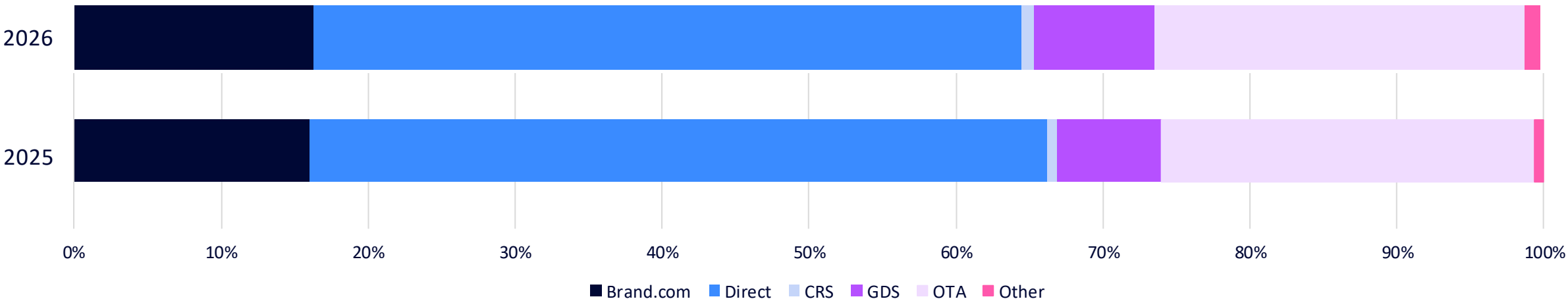


Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



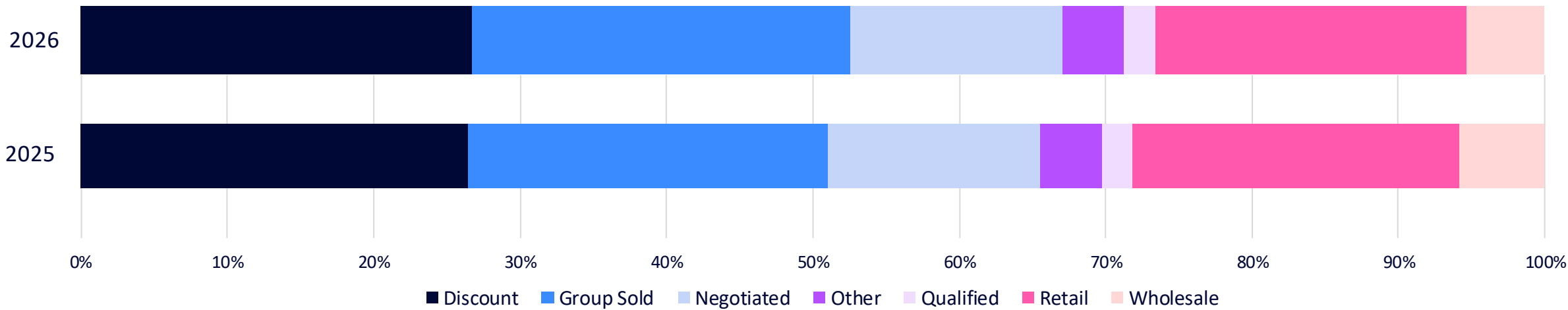
Hotel Channel mix in Central/Eastern Europe

On-the-books distribution for May 2026 vs May 2025

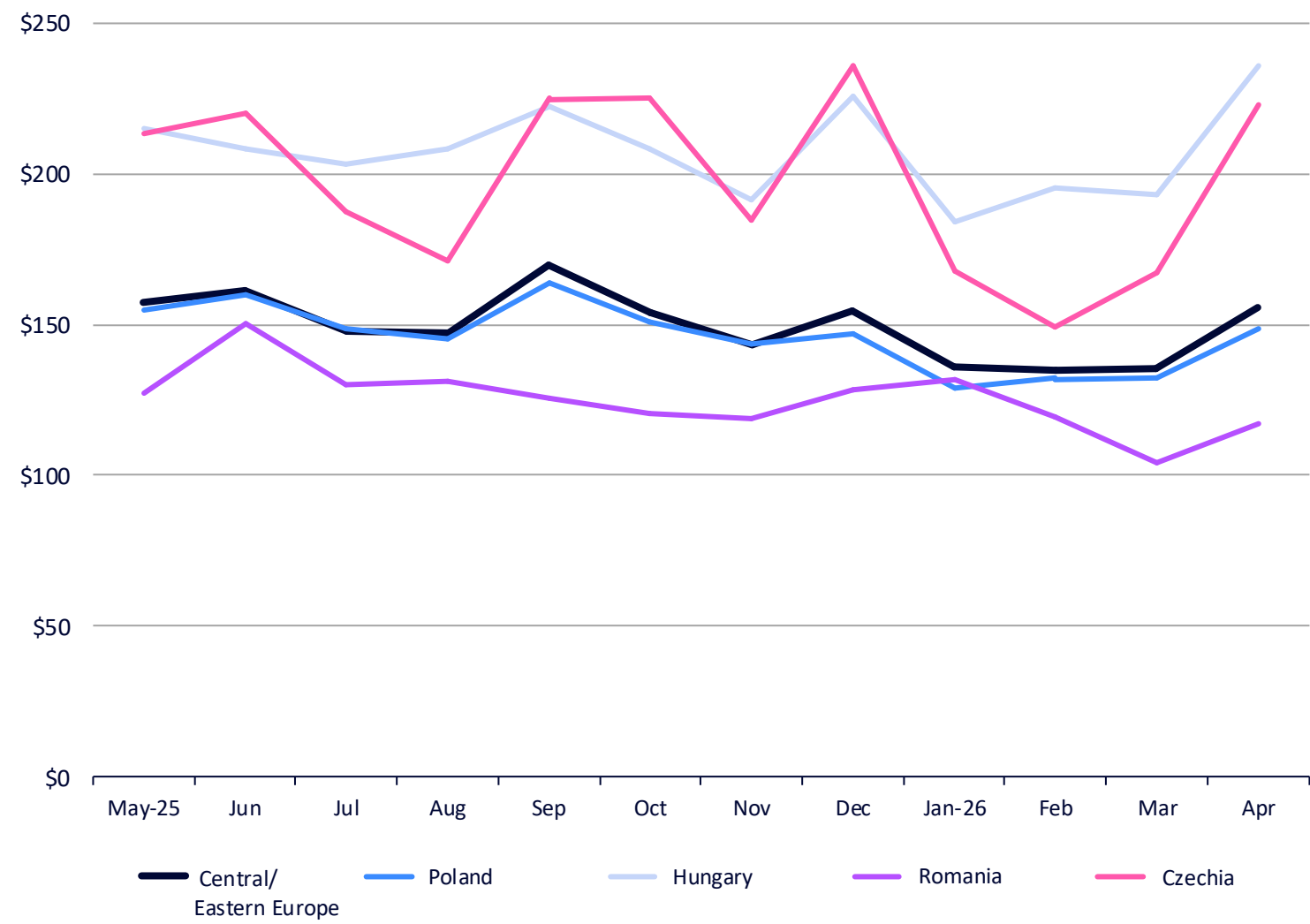


Hotel Segmentation in Central/Eastern Europe

On-the-books distribution for May 2026 vs May 2025



Average Daily Rate (ADR) in USD



Occupancy overview analysis

Central & Eastern Europe follows a clear and consistent seasonal occupancy pattern

Hotel occupancy in Hungary reached ~86%, with Poland close behind at ~85%, while regional occupancy held around 70% from May through October. This gives leading markets a reliable seasonal window for planning, though the performance stays concentrated in a handful of countries rather than broad-based across the region.

Forward-looking demand stays closely aligned with prior year

June 2026 on-the-books occupancy holds at ~30% across the region — with good forward signals from Czechia (~40%), Poland (~32%) and Hungary (~48%).

GDS and Brand.com gain ground as channel mix broadens further

GDS bookings rose to 8.2% for May 2026 (from 7.1% in 2025), while Brand.com edged up to ~16% and OTAs held a steady ~25% share alongside direct at ~48%. This broadening mix gives hotels and destinations multiple healthy pathways to reach corporate, leisure and direct guests alike.

Rates held firmest in peak season

Regional ADR peaked at ~\$170 in September 2025, with ADR in Czechia and Hungary reaching \$213-235 in peak months. That rate strength held up but is concentrated in peak season and a few destinations, leaving room for value-led packaging and differentiated experiences across the wider region.

Glossary for Central/Eastern Europe

Destination name	Subregion
Armenia	Central/Eastern Europe
Azerbaijan	Central/Eastern Europe
Bulgaria	Central/Eastern Europe
Czechia	Central/Eastern Europe
Estonia	Central/Eastern Europe
Georgia	Central/Eastern Europe
Hungary	Central/Eastern Europe
Kazakhstan	Central/Eastern Europe
Latvia	Central/Eastern Europe
Lithuania	Central/Eastern Europe
Poland	Central/Eastern Europe
Romania	Central/Eastern Europe
Russian Federation	Central/Eastern Europe
Slovakia	Central/Eastern Europe
Ukraine	Central/Eastern Europe
Uzbekistan	Central/Eastern Europe



Northern Europe



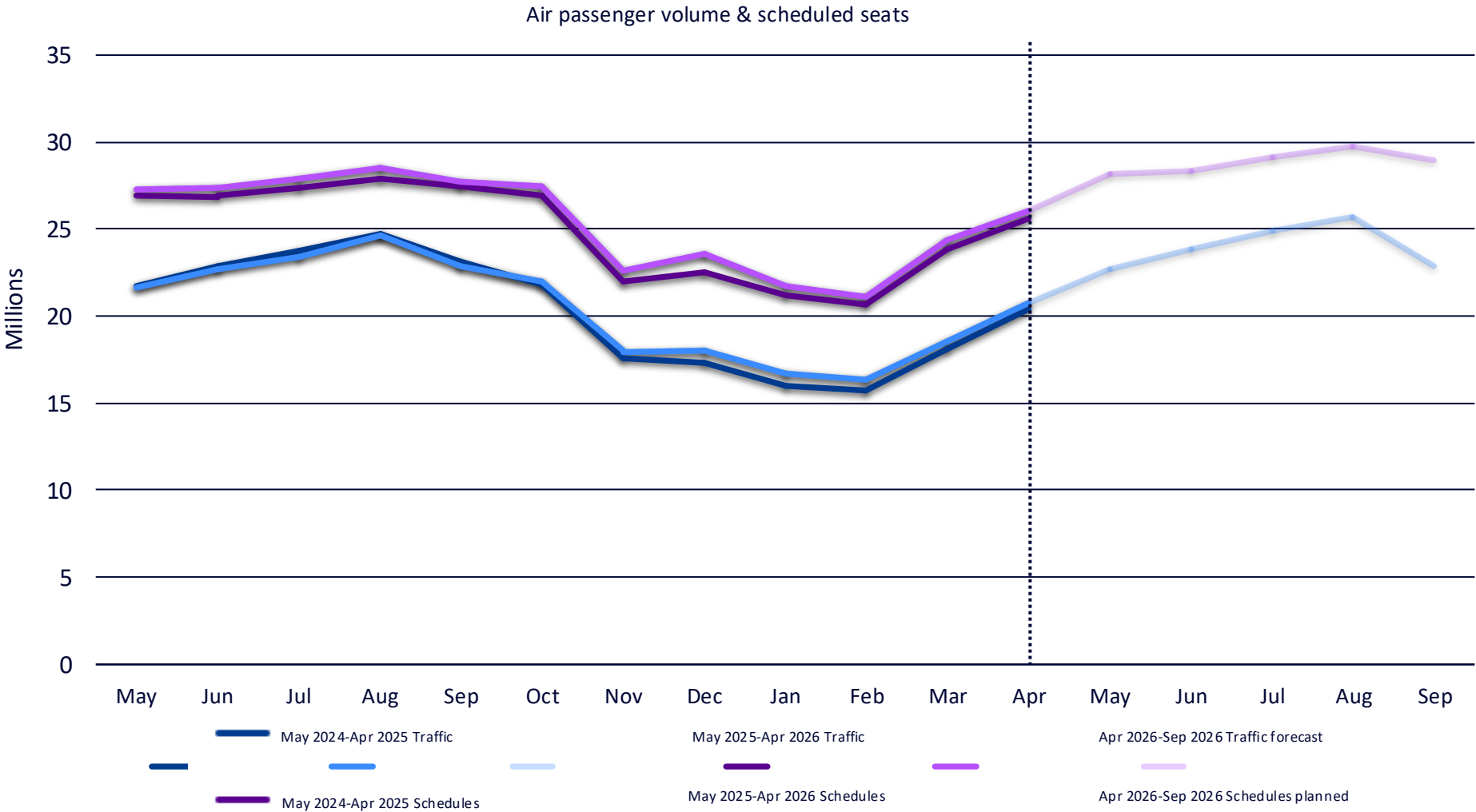
51

Air Travel Overview

A close-up, low-angle shot of a person's hands pressed against the circular frame of an airplane window. The person is looking out at a bright, cloudy sky. The window glass is covered in condensation droplets. The interior of the plane is dimly lit, with the light from the window illuminating the person's hands and the window frame.

Worldwide to Northern Europe

Passenger traffic and capacity



1.0%

year-on-year growth
in passenger traffic

Passenger demand to Northern Europe remains broadly stable, tracking closely with airline capacity. The limited increase in planned seats for early 2026 suggests measured airline confidence rather than expansionary intent, pointing to a market focused on maintaining volumes rather than driving accelerated growth.

Where do visitors come from?

Reality vs. aspirations

Top origin markets **searching** for Northern Europe

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
United States	1	1
United Kingdom	2	2
Spain	3	3
Germany	4	4
Italy	5	5
India	7	6
France	6	7
China	8	8
Canada	9	9
Norway	10	10

Top origin markets **traveling** to Northern Europe*

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Norway	1	1
United States	2	2
United Kingdom	3	3
Sweden	4	4
Germany	5	5
India	6	6
Denmark	7	7
Spain	8	8
Italy	10	9
Australia	9	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"



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

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

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Japan	1	66%
Saudi Arabia	2	57%
Thailand	3	56%
Portugal	4	40%
Hong Kong (China)	5	36%
Republic of Korea	6	34%
China	7	34%
United States	8	33%
Canada	9	31%
India	10	31%

Top origin markets **traveling** to Northern Europe* with the highest growth (among the TOP 30)

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Japan	1	15%
Ireland	2	14%
Denmark	3	13%
Poland	4	13%
Finland	5	12%
Spain	6	12%
Italy	7	9%
United Kingdom	8	6%
Thailand	9	5%
Canada	10	5%

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026





Where do people travel to in Northern Europe?

Reality vs aspirations

Top **searched** destinations in Northern Europe

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
United Kingdom	1	1
Denmark	4	2
Ireland	3	3
Norway	2	4
Sweden	5	5
Finland	6	6
Iceland	7	7

Top **booked** destinations in Northern Europe*

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
United Kingdom	1	1
Norway	2	2
Sweden	3	3
Denmark	4	4
Ireland	5	5
Finland	6	6
Iceland	7	7

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"



Top performing destinations in Northern Europe

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Sweden	1	36%
Denmark	2	34%
Ireland	3	33%
Norway	4	31%
United Kingdom	5	27%
Finland	6	26%
Iceland	7	16%

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Iceland	1	11%
Denmark	2	8%
Finland	3	5%
Sweden	4	4%
Norway	5	5%

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Air Travel overview analysis

Top origin markets stay stable, anchoring a predictable demand base

The top 5 booked origin markets - Norway, the United States, the United Kingdom, Sweden and Germany - held their year-on-year positions, while top searches led by the United States and the United Kingdom showing similar consistency at the top. This alignment gives destinations a reliable demand base to anchor long-term capacity and marketing plans.

Long-haul search interest is surging, signaling fresh opportunities

Searches from Japan (+66%), Saudi Arabia (+57%) and Thailand (+56%) lead Top 30 growth, with Hong Kong (China) (+36%), the Republic of Korea(+34%) and China (+34%) close behind. Japan also tops booked-origin growth at +15% YoY, showing curiosity is already converting into trips and opening a runway for diversification.

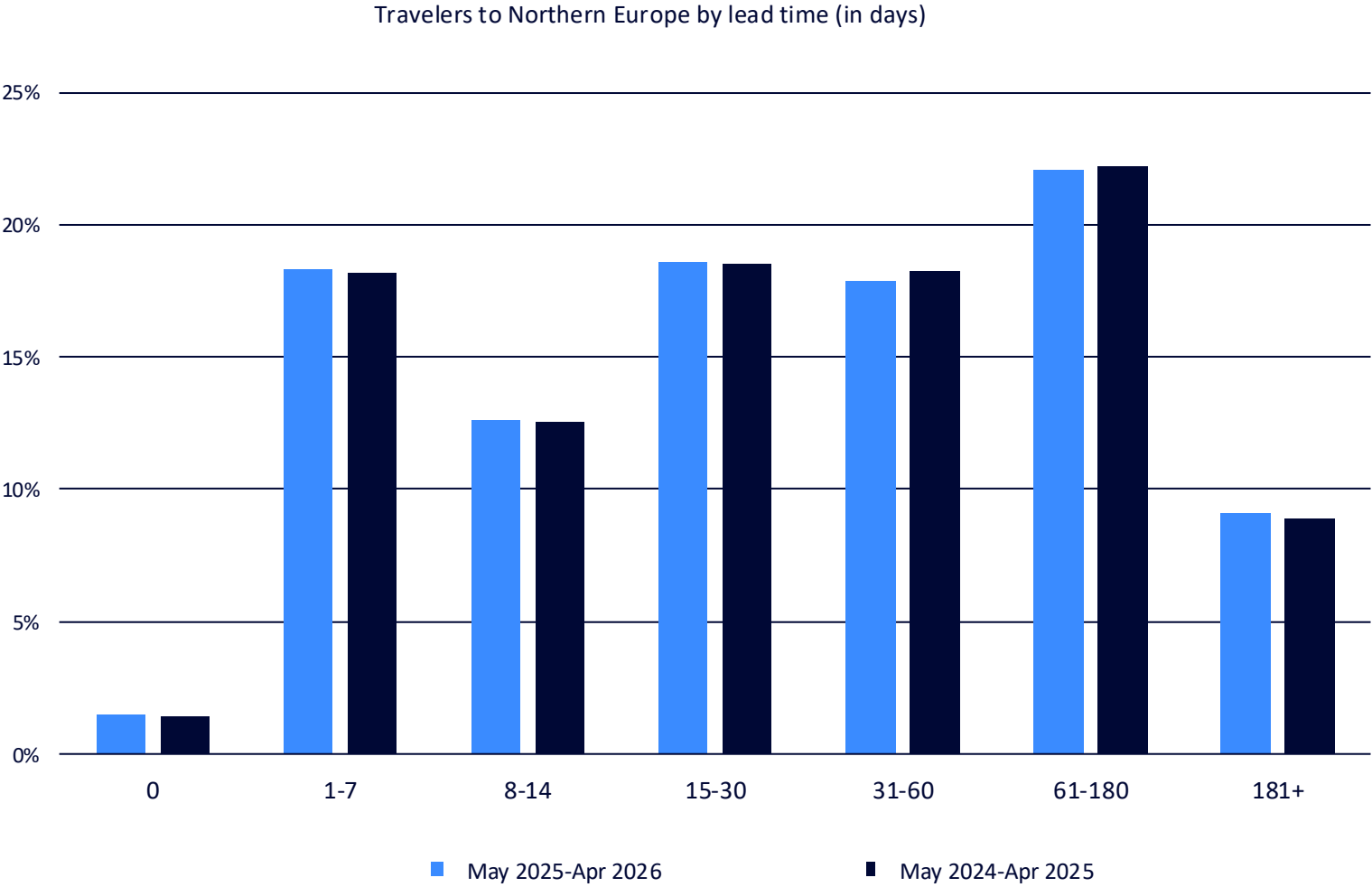
Search interest is broad-based across every Northern Europe destination

Every Top 30 destination posted strong YoY search growth, led by Sweden (+36%), Denmark (+34%) and Ireland (+33%), with Norway (+31%), the United Kingdom (+27%) and Finland (+26%) close behind. This region-wide interest means every destination has room to grow visibility within an expanding consideration set.

Iceland leads on combined search and booking momentum

Iceland tops booking growth among Top 30 markets at +11%, paired with +16% search growth — and with Denmark, Sweden, Norway and Finland also positive on both, the region shows broad-based momentum. This points to a consumer pull toward nature-led experiences, giving the region a anchor for authentic, immersive storytelling.

Air Travel Bookings to Northern Europe by Lead Time



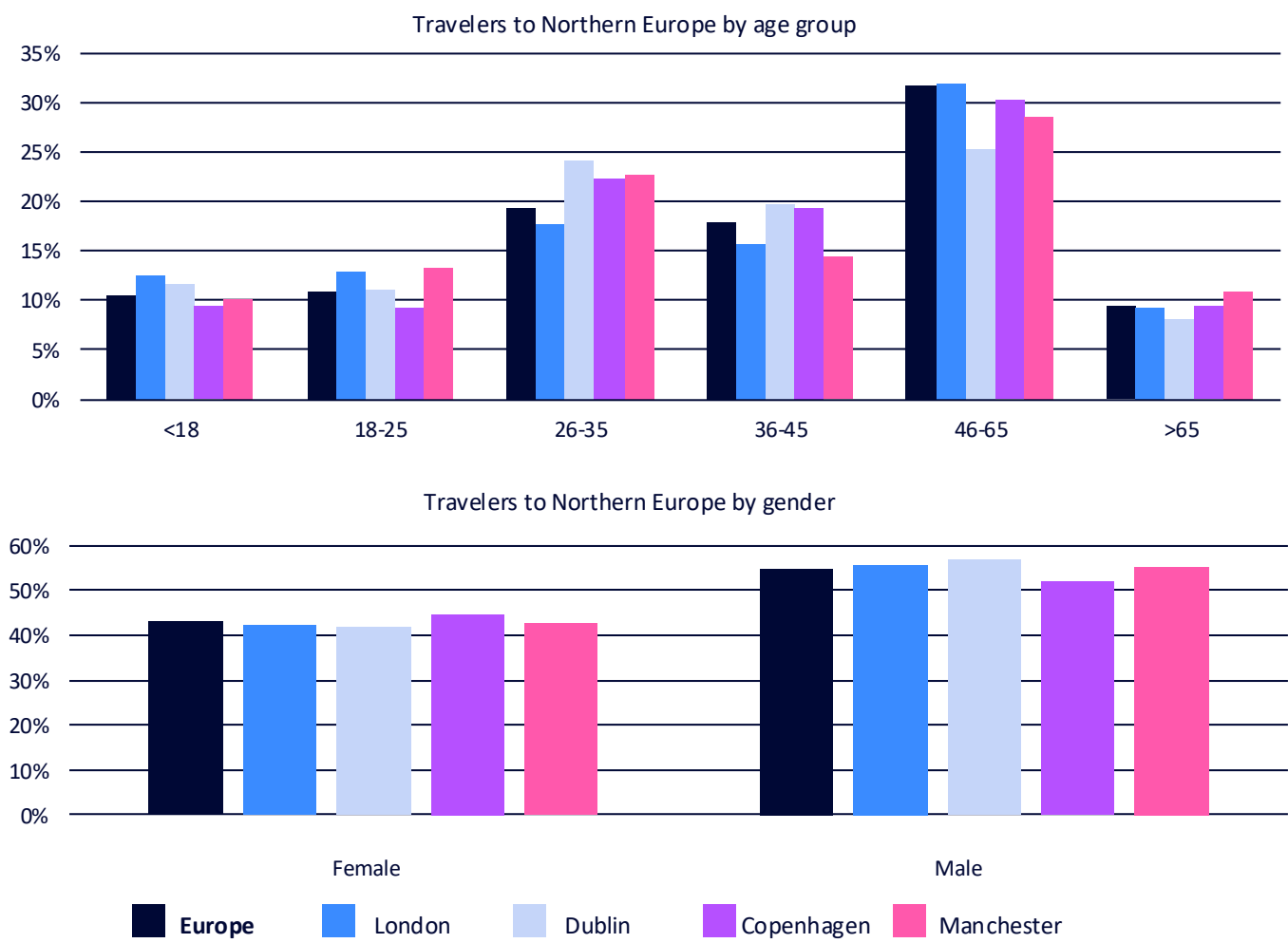
Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026





What type of Travelers travel to Northern Europe

Top destinations



334 new routes in Northern Europe

Top new international routes (based on seat capacity)

Origin market	New routes
Spain	32
Italy	23
Germany	16
France	14
Greece	14
Norway	13
Finland	12
Poland	11
United States	10
Austria	8
Romania	8
Türkiye	8

New routes	Origin market	Destination market
MED-LON	Saudi Arabia	United Kingdom
BOM-MAN	India	United Kingdom
EBB-LON	Uganda	United Kingdom
PHL-EDI	United States	United Kingdom
IND-DUB	United States	Ireland
SEL-CPH	Republic of Korea	Denmark
DEL-MAN	India	United Kingdom
SEA-CPH	United States	Denmark
VNO-BGO	Lithuania	Norway
DMM-LON	Saudi Arabia	United Kingdom
ISB-MAN	Pakistan	United Kingdom
DTT-DUB	United States	Ireland



Lead time, profile and connectivity analysis

Long-lead planning is gaining ground, giving destinations more visibility

Roughly 49% of bookings to Northern Europe are made 31+ days in advance, with the 61-180 day window leading at 22.2% - slightly above last year.

Mid-window and short-lead bookings hold steady, supporting flexible campaigns

Another ~31% of trips fall within the 1-14 day window and ~18.5% in the 15-30 day window, showing many Travelers also book on shorter notice. Destinations can capture this segment with quick-turnaround offers, weekend packages and flash campaigns.

Northern Europe attracts a mature, high-spend visitor mix with multigenerational appeal

Travelers aged 46-65 lead the visitor mix at ~32%, with the 26-45 segment combining for another ~37%. This experienced, higher-spend audience supports premium experiences while younger Travelers add meaningful balance to the mix.

Route expansion signals broadening global access into Northern Europe

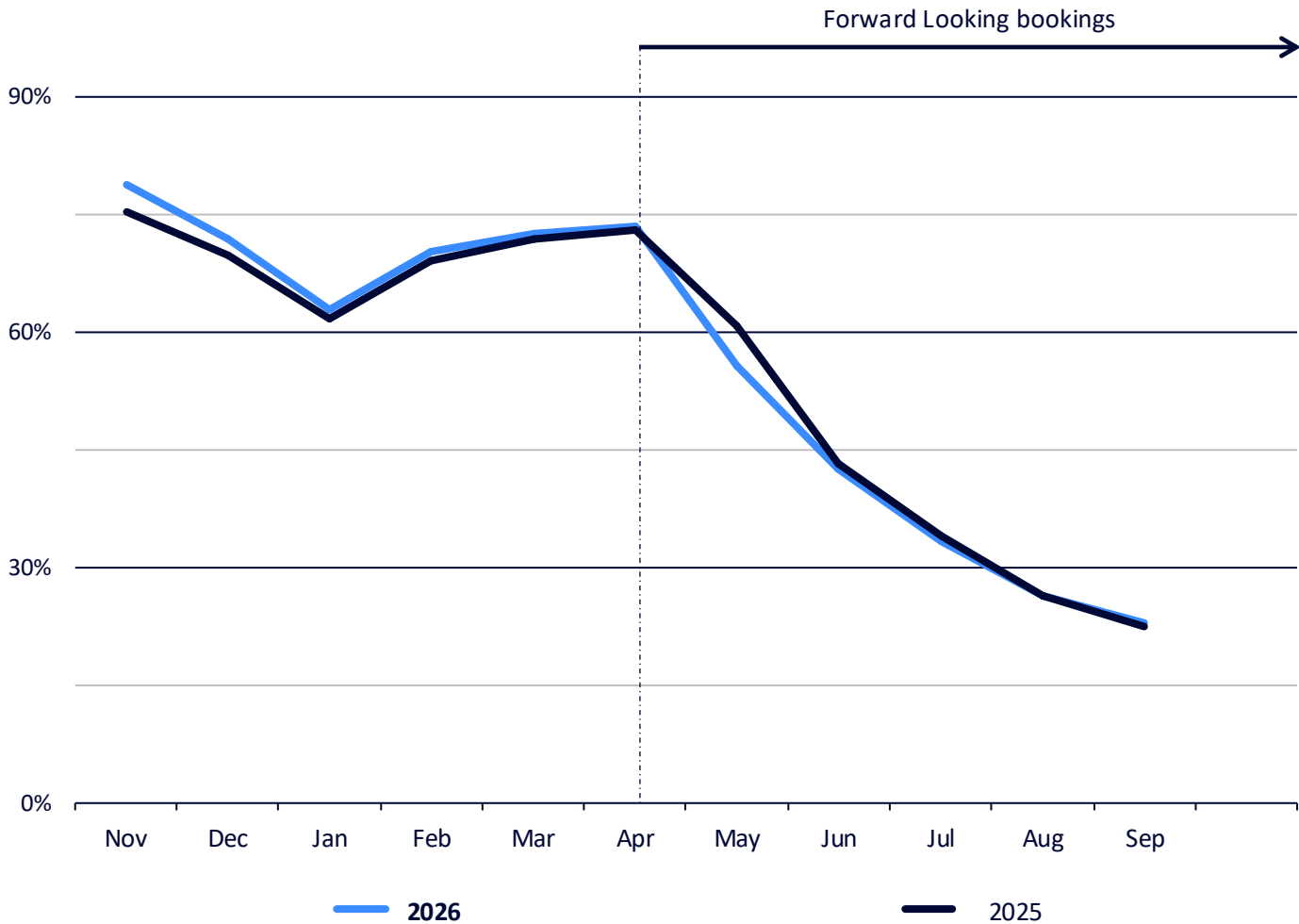
334 new routes have launched into Northern Europe, with Spain (32), Italy (23) and Germany (16) as the top origin markets, followed by France and Greece (14 each). Notably, long-haul connections from India, Saudi Arabia, the US and South Korea are opening new corridors — particularly into the UK, Ireland and Denmark — diversifying the inbound mix and extending the region's reach well beyond its traditional European feeder markets.

Hospitality Occupancy Overview



Hotel Occupancy in Northern Europe

On-the-books by month compared to same month last year

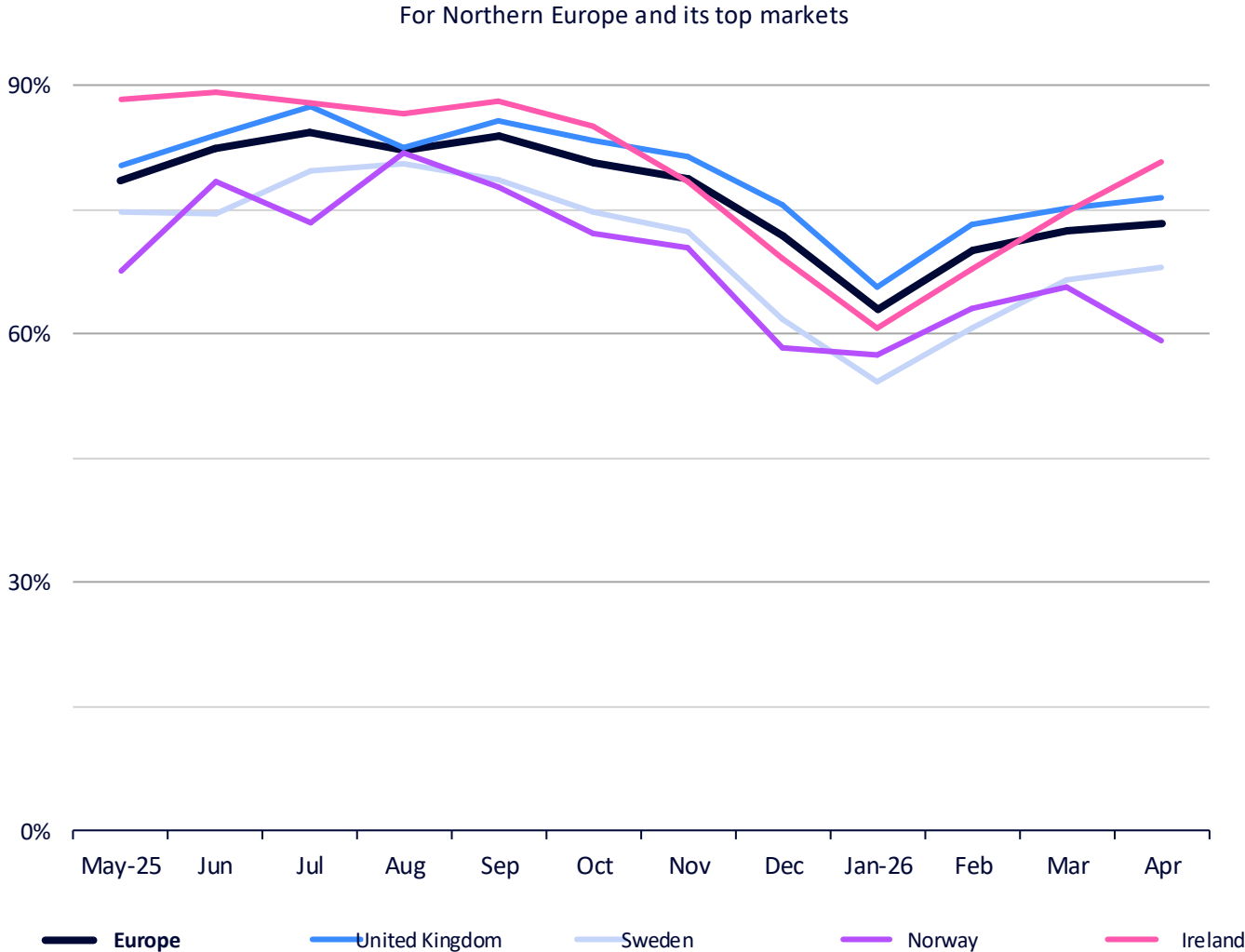


Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



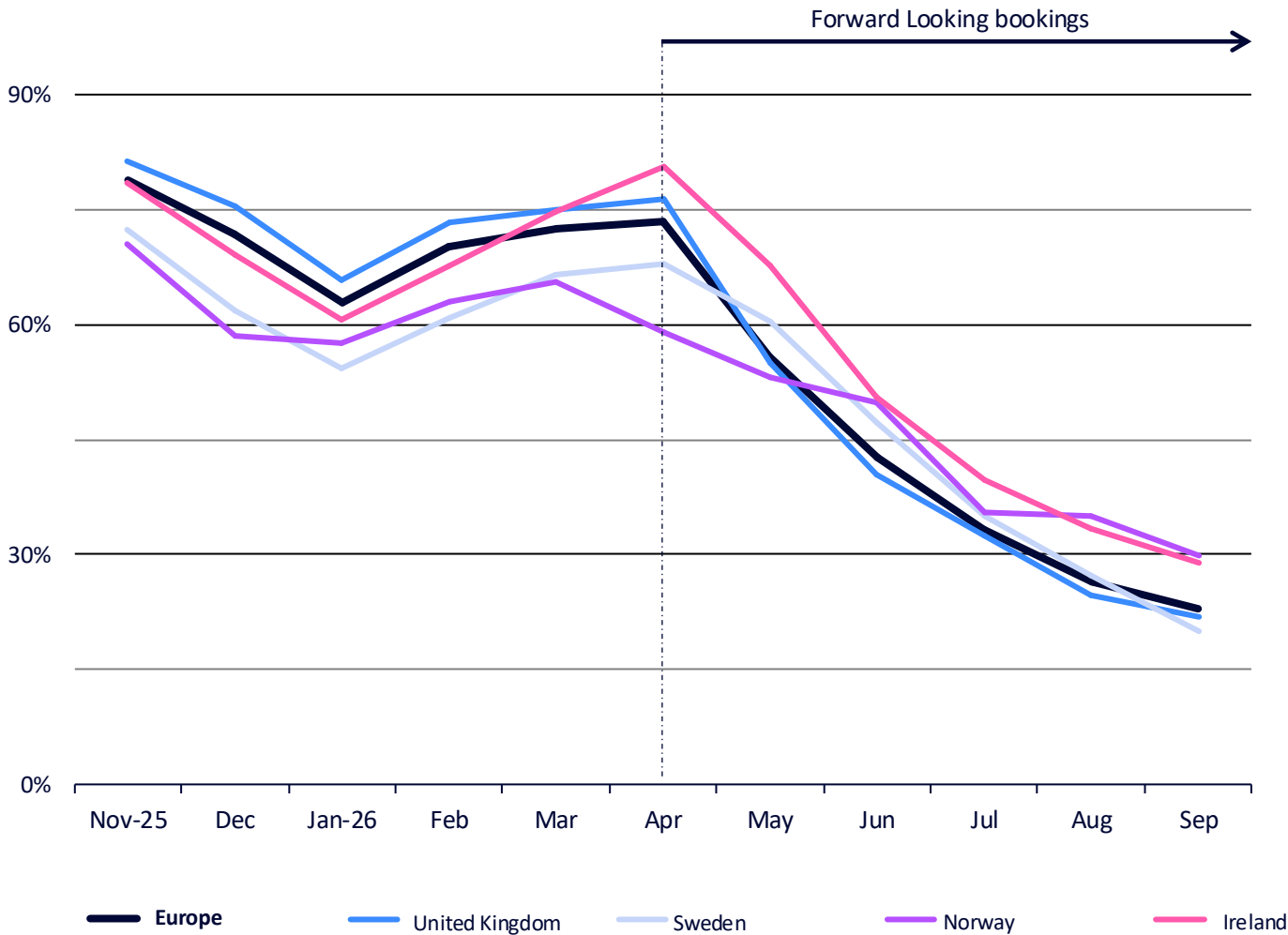


Hotel Occupancy for the past 12 months



Hotel Occupancy On-the-Books

For Northern Europe and its top markets

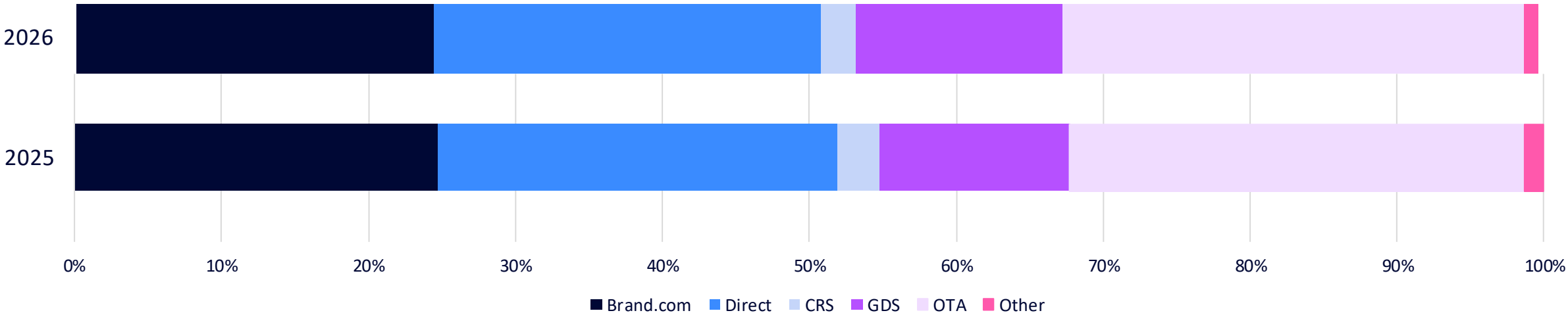


Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



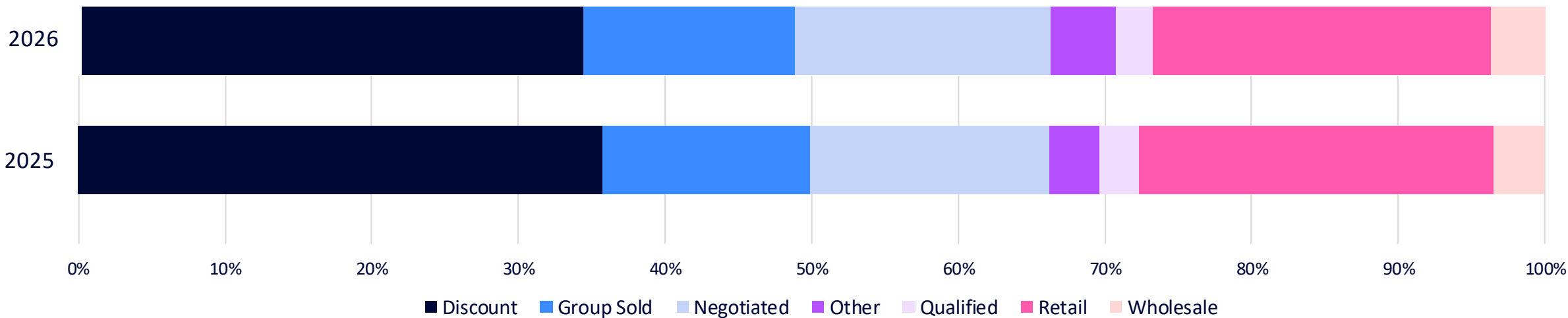
Hotel Channel mix in Northern Europe

On-the-books distribution for May 2026 vs May 2025

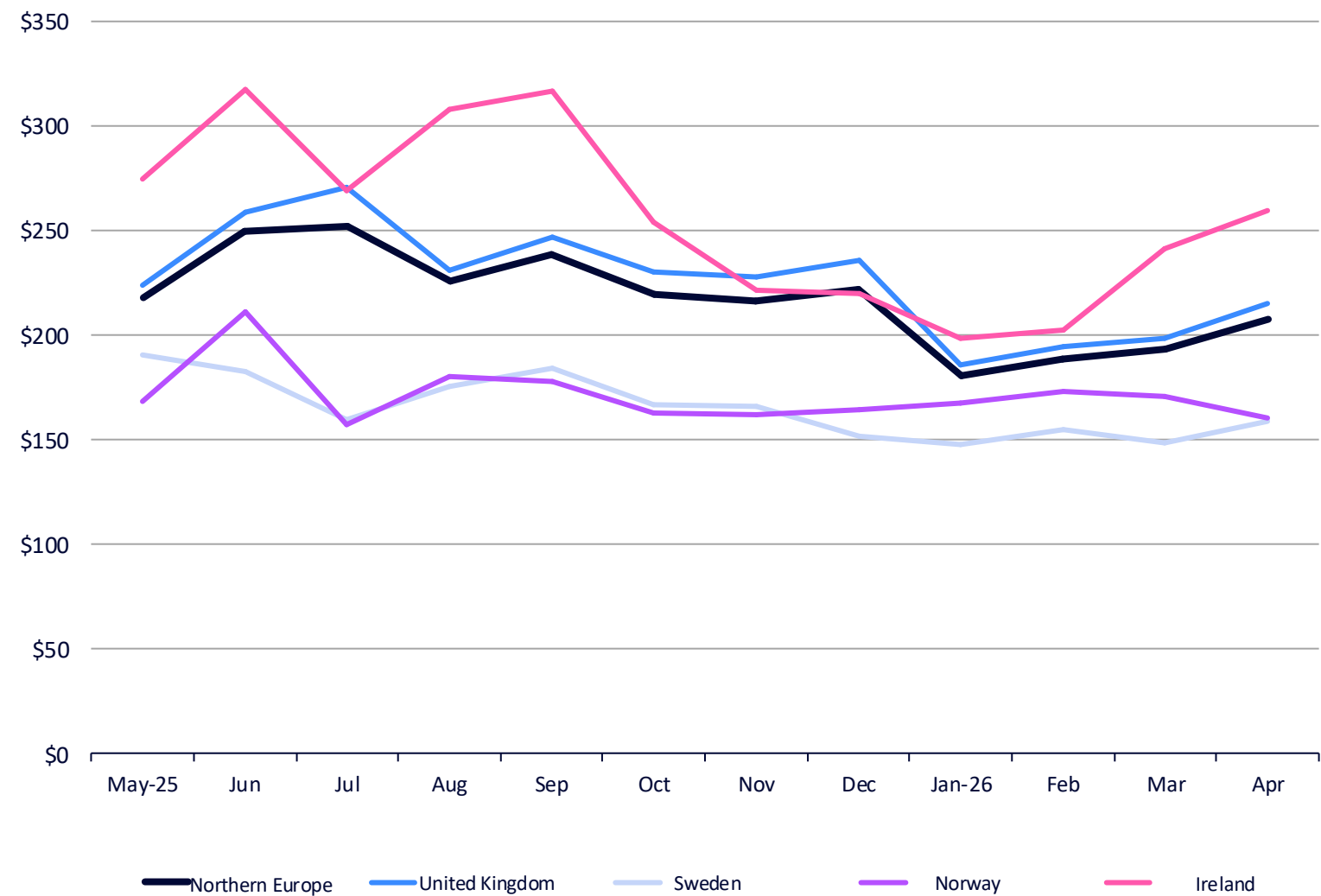


Hotel Segmentation in Northern Europe

On-the-books distribution for May 2026 vs May 2025



Average Daily Rate (ADR) in USD



Occupancy overview analysis

Northern Europe follows a consistent and well-defined seasonal occupancy pattern

Occupancy builds steadily into spring peaks (~70–75%), followed by a gradual decline into summer months and a later stabilization. This clear and repeatable pattern supports accurate forecasting and planning across markets.

Forward booking trends show aligned recovery patterns across all Northern markets

On-the-books data highlights a shared post-April decline followed by gradual recovery toward September, consistent across the UK, Sweden, Norway, and Ireland. This alignment creates clear timing windows to activate demand and optimize performance.

Channel mix stays balanced, keeping multiple paths open to Travelers

Distribution remains highly consistent year-over-year, with OTA (~32%), Direct (~26%) and Brand.com (~25%) as the three leading channels — around 82% of distribution combined — while Discount, Retail and Negotiated segments dominate. This stability provides a reliable foundation for commercial and revenue strategies.

Diverse pricing across markets highlights strong opportunities for value optimization

ADR varies significantly across Northern Europe, with Ireland reaching the highest price points (~\$300+) and the UK following at (~\$190-210). This spread creates clear opportunities to refine pricing strategies and maximize revenue by market.

Glossary for Northern Europe

Destination name	Subregion
Denmark	Northern Europe
Finland	Northern Europe
Iceland	Northern Europe
Ireland	Northern Europe
Norway	Northern Europe
Sweden	Northern Europe
United Kingdom	Northern Europe



Southern/Mediterranean Europe



Air Travel Overview



Worldwide to Southern/Mediterranean Europe

Passenger traffic and capacity



4.2%

year-on-year growth
in passenger traffic

Passenger demand to Southern/Mediterranean Europe remains consistently aligned with airline capacity, and the planned increase in seats for early 2026 signals strong confidence from carriers—creating a solid foundation for destinations to capture sustained, stable growth across the region.

Where do visitors come from?

Reality vs. aspirations

Top origin markets searching for Southern/Mediterranean Europe		
Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Germany	1	1
United Kingdom	2	2
United States	4	3
Italy	3	4
Spain	5	5
France	6	6
Brazil	7	7
Poland	8	8
Türkiye	10	9
Netherlands	9	10

Top origin markets traveling to Southern/Mediterranean Europe*		
Origin market	May.24-Apr.25 ranking	May.25-Apr.26 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
Denmark	12	9
Sweden	11	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



Are travelers from these markets to Southern/Mediterranean Europe already on your radar?

Top origin markets **searching** for Southern/Mediterranean Europe with the highest growth (among the TOP 30)

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Japan	1	60%
Russian Federation	2	49%
China	3	47%
Republic of Korea	4	46%
Saudi Arabia	5	45%
United States	6	39%
Canada	7	31%
Türkiye	8	29%
India	9	26%
Portugal	10	25%

Top origin markets **traveling** to Southern/Mediterranean Europe* with the highest growth (among the TOP 30)

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Algeria	1	17%
Poland	2	14%
Denmark	3	10%
Republic of Korea	4	9%
Egypt	5	6%
Australia	6	2%
Spain	7	2%
Norway	8	1%

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



Travel trends 2026: focus on Southern/Mediterranean Europe



Where do people travel to in Southern/Mediterranean Europe?

Reality vs aspirations

Top **searched** destinations in Southern/Mediterranean Europe

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
Spain	1	1
Italy	2	2
Türkiye	3	3
Greece	4	4
Portugal	5	5
Croatia	6	6
Israel	7	7
Cyprus	8	8
Albania	10	9
Malta	9	10

Top **booked** destinations in Southern/Mediterranean Europe*

Destination	May.24-Apr.25 ranking	May.25-Apr.26 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	9	9
Serbia	10	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Top performing destinations in the Southern/Mediterranean Europe

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Israel	1	46%
Albania	2	27%
Slovenia	3	26%
Spain	4	26%
Portugal	5	26%
Italy	6	25%
Bosnia and Herzegovina	7	23%
Türkiye	8	21%
Montenegro	9	21%
Malta	10	21%

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking
Israel	1
Spain	2
Croatia	3
Slovenia	4
Italy	5
Albania	6
Greece	7
Portugal	8
Cyprus	9
Malta	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Air Travel overview analysis

Stable origin core anchors a 4.2% YoY traffic uplift to the region

Passenger traffic to Southern/Mediterranean Europe is up **4.2% YoY**, with airline capacity moving in lock-step. The top booked origin markets — Spain, the United States, Italy, Germany and France — remain the region's core demand base year on year, giving destinations a dependable foundation for long-term marketing and air-connectivity planning.

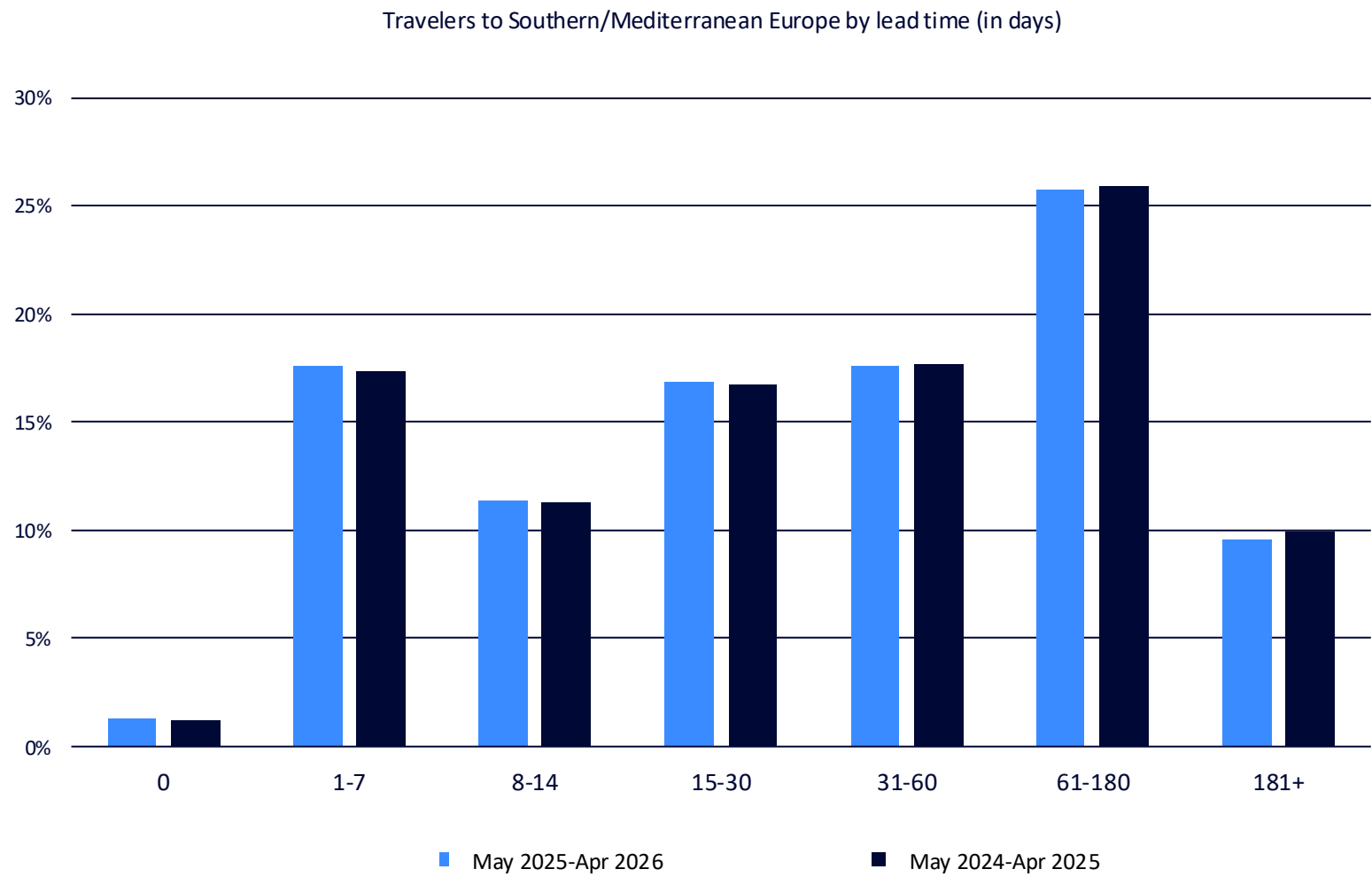
Long-haul and intra-regional search momentum unlocks fresh demand pools

Searches from Japan (+60%), the Russian Federation (+49%), China (+47%) and the Republic of Korea (+46%) post the strongest YoY gains within the Top 30 origin markets, while booked-origin growth is led by nearer markets — Algeria (+17%), Poland (+14%) and Denmark (+10%). This gap signals a clear opportunity to convert surging long-haul search interest into actual visits and diversify the visitor mix beyond traditional European feeders.

Emerging destinations capture rising traveler curiosity

Israel (+46%), Albania (+27%) and Slovenia (+26%) lead YoY search growth across the region, with Spain, Portugal and Italy also posting +25-26% search gains. This mix of established and lesser-explored destinations confirms Travelers are actively looking beyond the obvious — opening room for cultural, nature and authentic-experience positioning.

Air Travel Bookings to Southern/ Mediterranean Europe by Lead Time



Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026

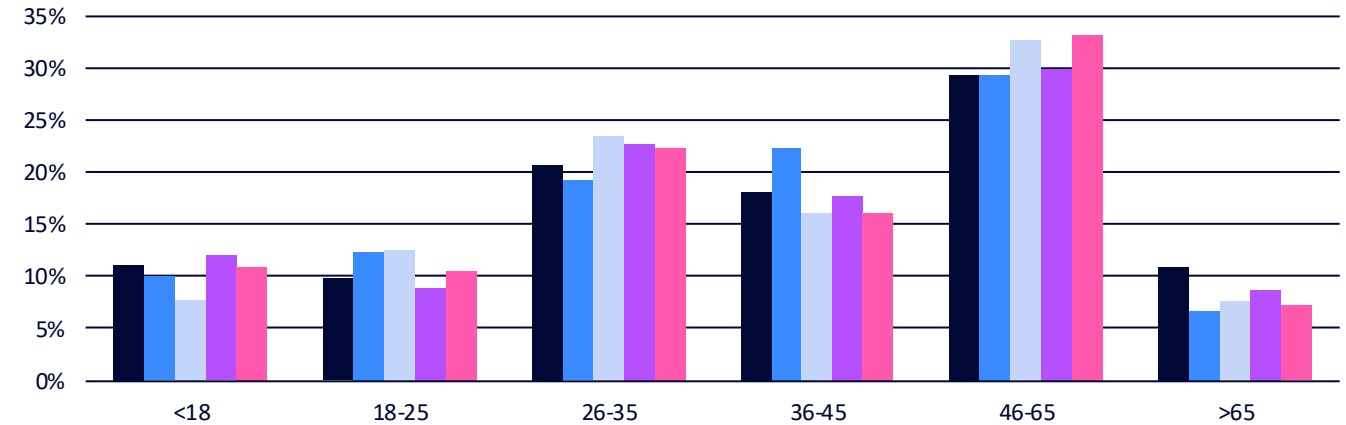




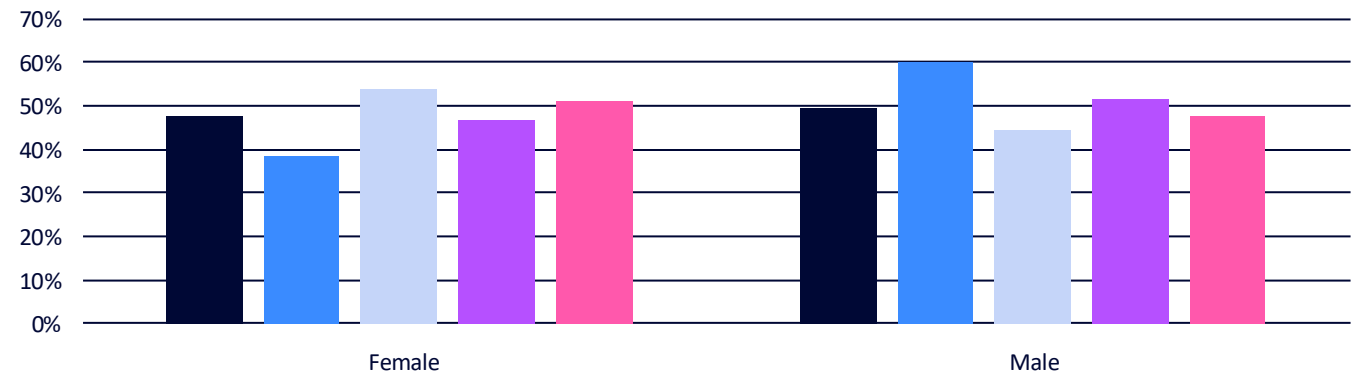
What type of Travelers travel to Southern/Mediterranean Europe

Top destinations

Travelers to Southern/Mediterranean Europe by age group



Travelers to Southern/Mediterranean Europe by gender



Europe Istanbul Madrid Milan Barcelona

1100 new routes in Southern/Mediterranean Europe

Top new international routes (based on seat capacity)

Origin market	New routes
Germany	96
France	58
Italy	51
Spain	51
Egypt	49
Romania	43
United Kingdom	39
Poland	38
Sweden	30
Saudi Arabia	24
Morocco	22
United States	21

New routes	Origin market	Destination market
BTS-BCN	Slovakia	Spain
ALP-IST	Syria	Türkiye
KRR-IST	Russian Federation	Türkiye
ADD-OPO	Ethiopia	Portugal
LAX-LIS	United States	Portugal
CTU-ATH	China	Greece
DEN-ROM	United States	Italy
REC-MAD	Brazil	Spain
CHI-NAP	United States	Italy
WMI-PMO	Poland	Italy
NYC-CTA	United States	Italy
HAN-MIL	Vietnam	Italy



Lead time, profile and connectivity analysis

Long lead-time planning gives destinations a predictable demand runway

Roughly ~53% of bookings to Southern/Mediterranean Europe are made 31+ days in advance, with the 61-180 day window alone accounting for ~26% — the largest single bucket. This deep advance-purchase pattern lets destinations time pricing, marketing and capacity decisions with confidence.

Short-window demand stays healthy at ~29%, opening room for last-minute capture

Around ~29% of trips fall inside the 1-14 day window, with another ~17% landing 15-30 days out. Travelers are actively booking close to departure, creating space for flash promotions, weekend packages and dynamic pricing aimed at flexible last-minute demand.

Mature age mix powers spending across the region's flagship cities

Travelers aged 46-65 lead the visitor base at ~29-33% across Barcelona, Milan, Istanbul and Madrid, while the 26-35 cohort holds a steady ~21-23%. This balanced multi-generational mix supports both premium experience offers and family or active-traveler positioning.

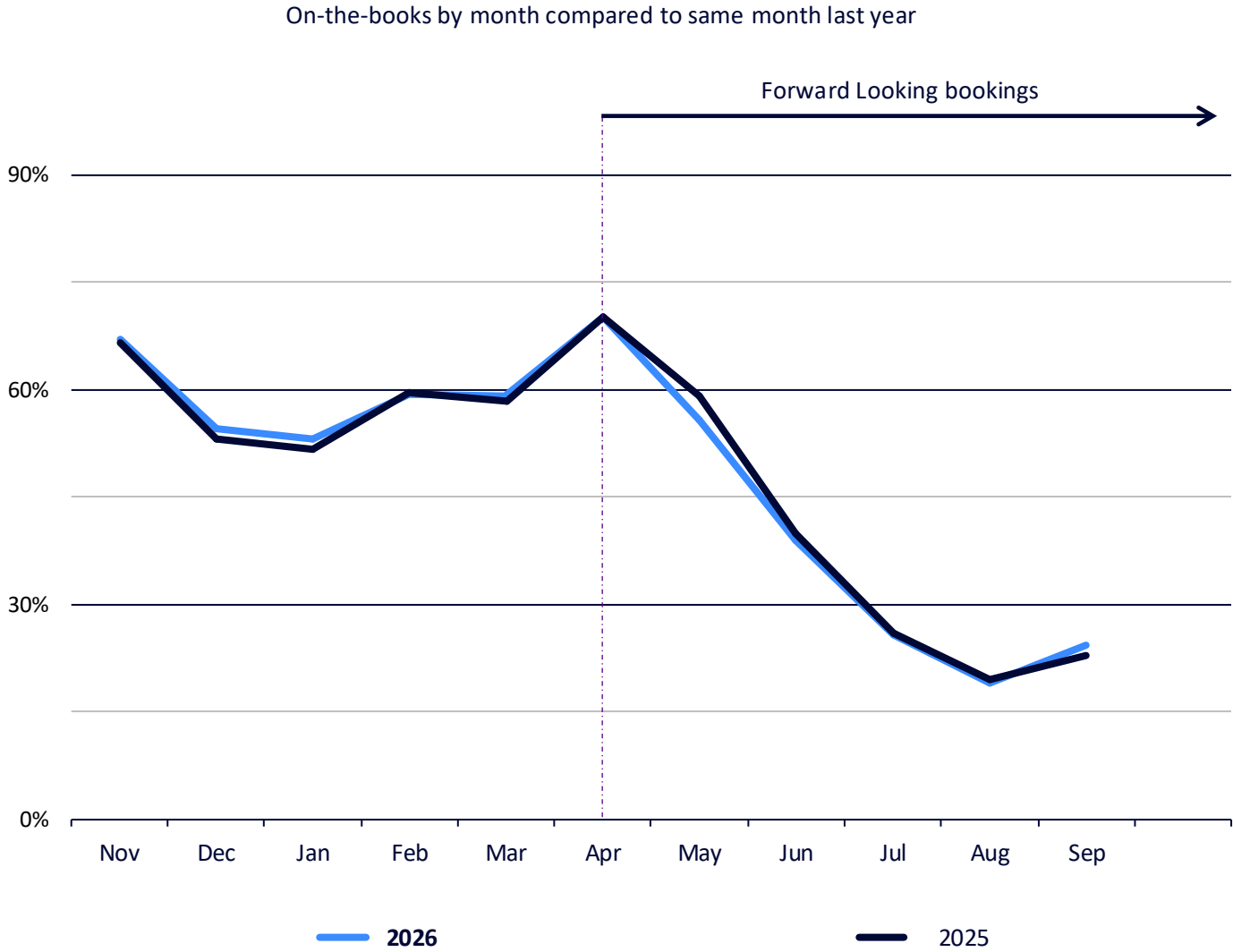
New route launches broaden the region's reach for diverse source markets

A total of 1,100 new international routes launched across Southern/Mediterranean Europe over the past year, opening fresh gateways for both established source markets such as Germany and the United States and fast-rising origins including Japan and the Republic of Korea.

Hospitality Occupancy Overview



Hotel Occupancy in Southern/Mediterranean Europe

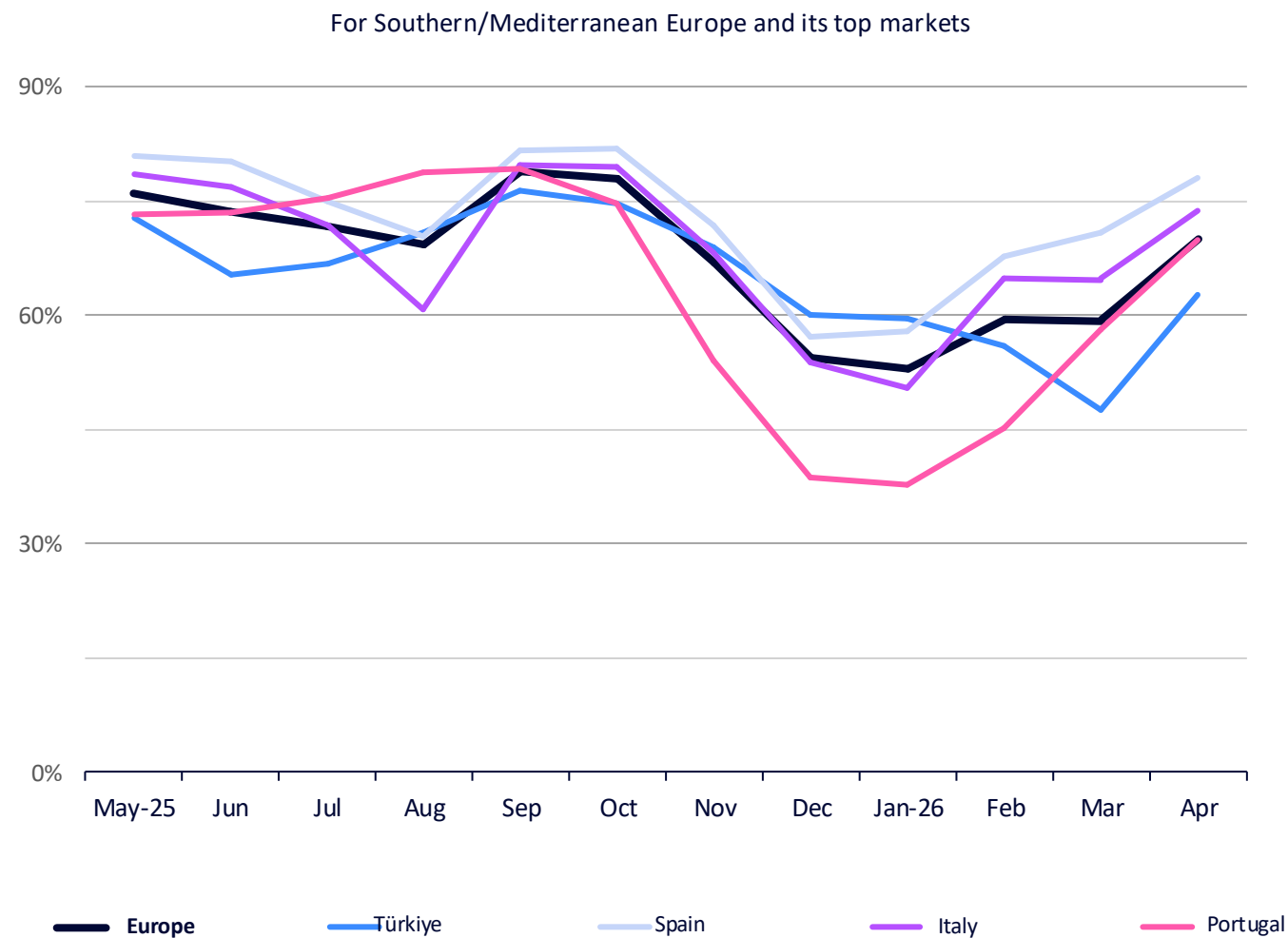


Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



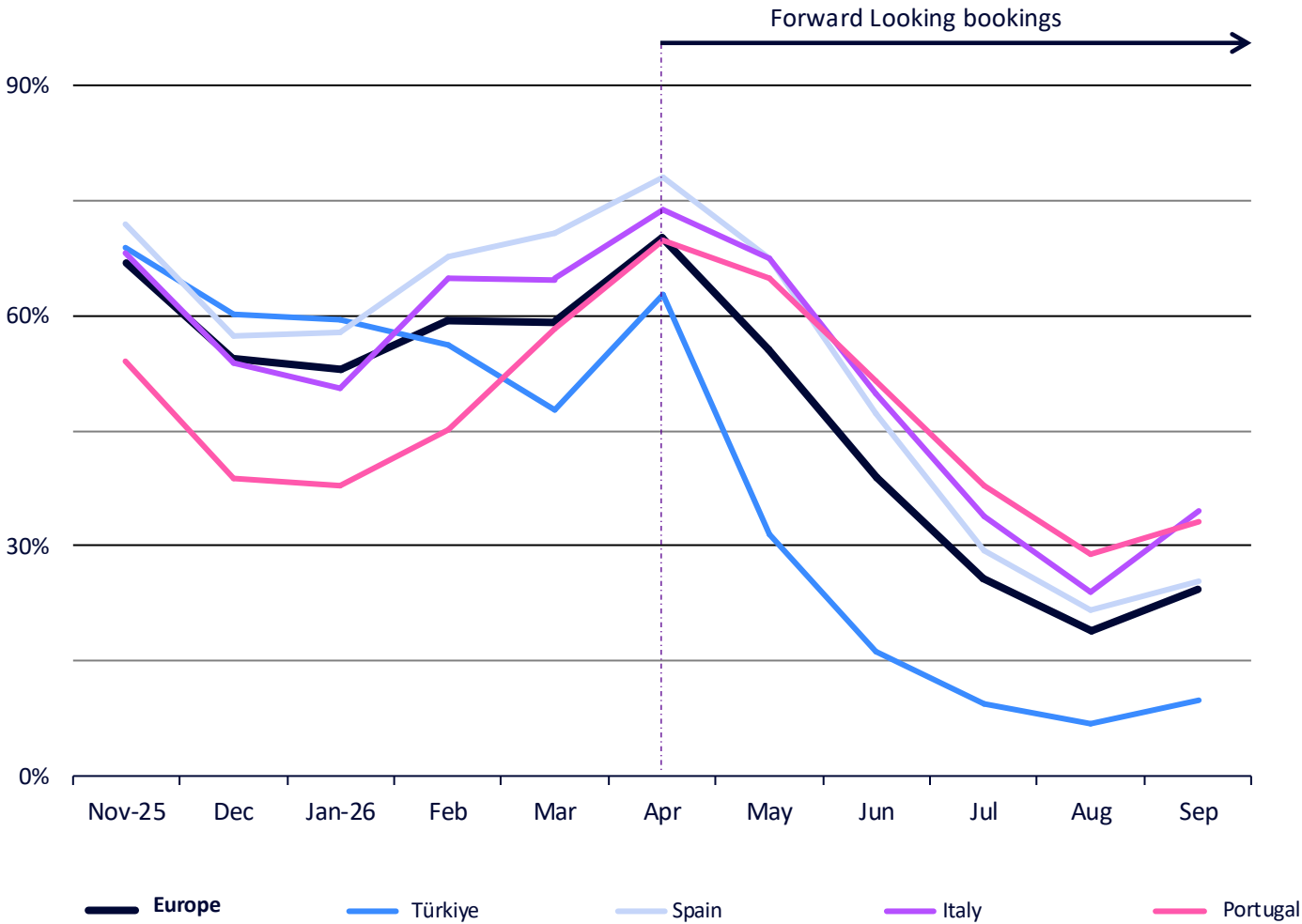


Hotel Occupancy for the past 12 months



Hotel Occupancy On-the-Books

For Southern/Mediterranean Europe and its top markets

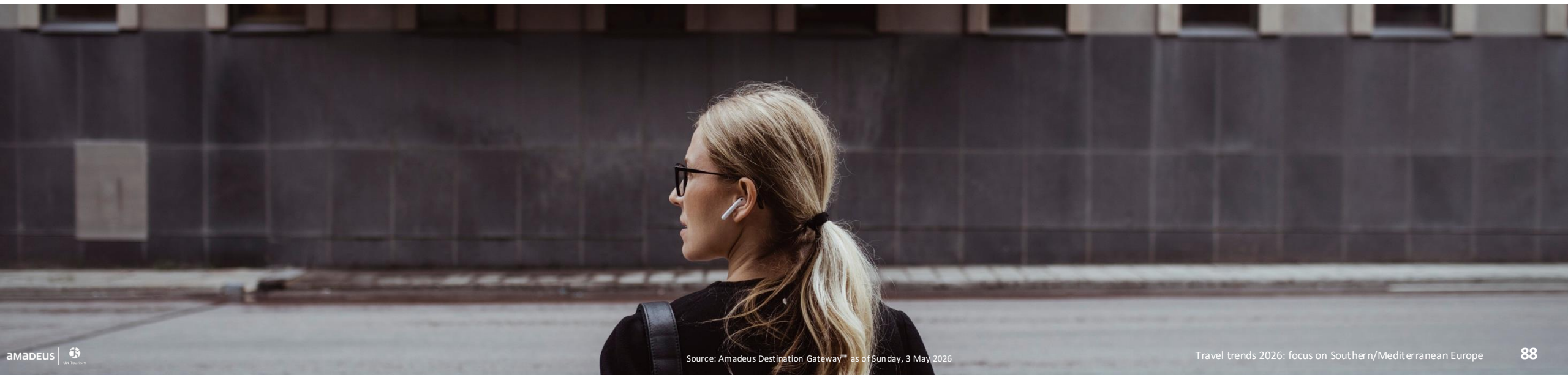
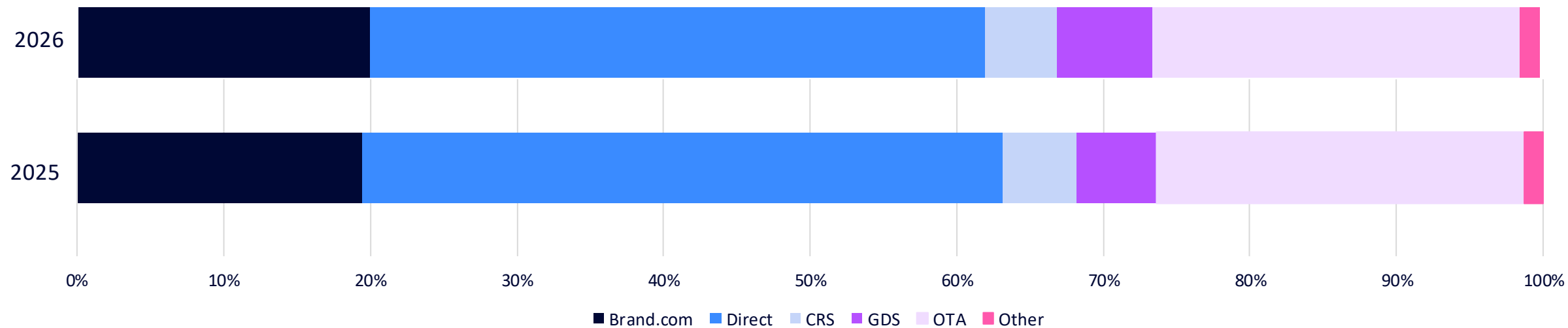


Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



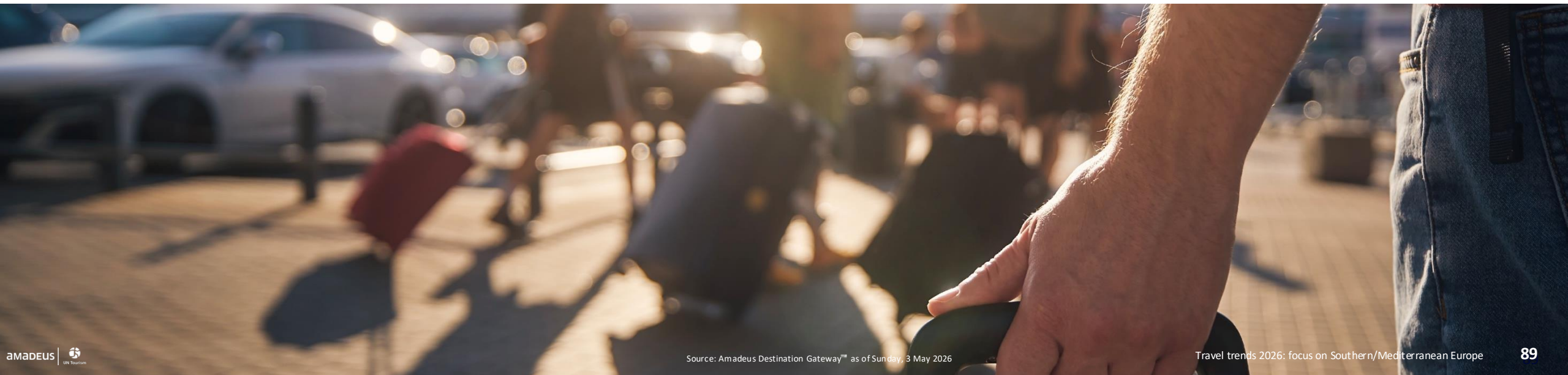
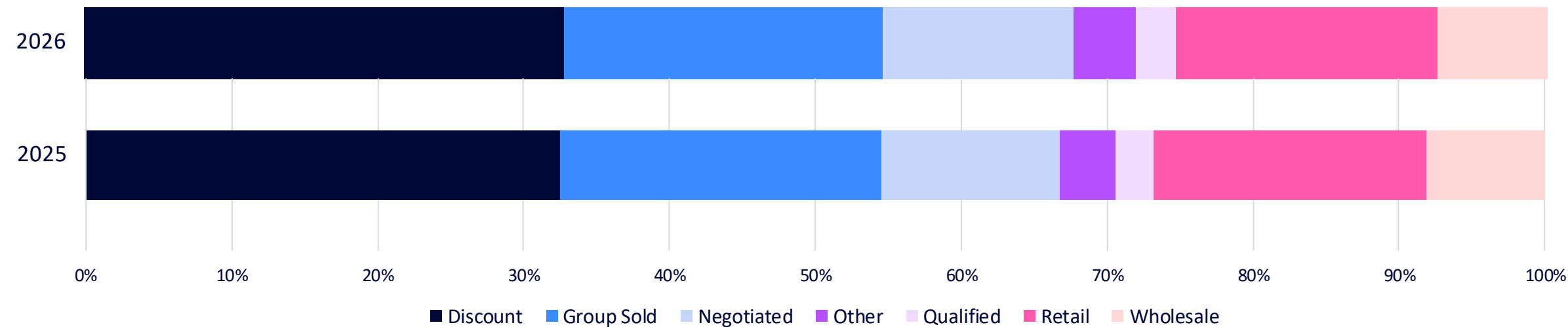
Hotel Channel mix in Southern/Mediterranean Europe

On-the-books distribution for May 2026 vs May 2025

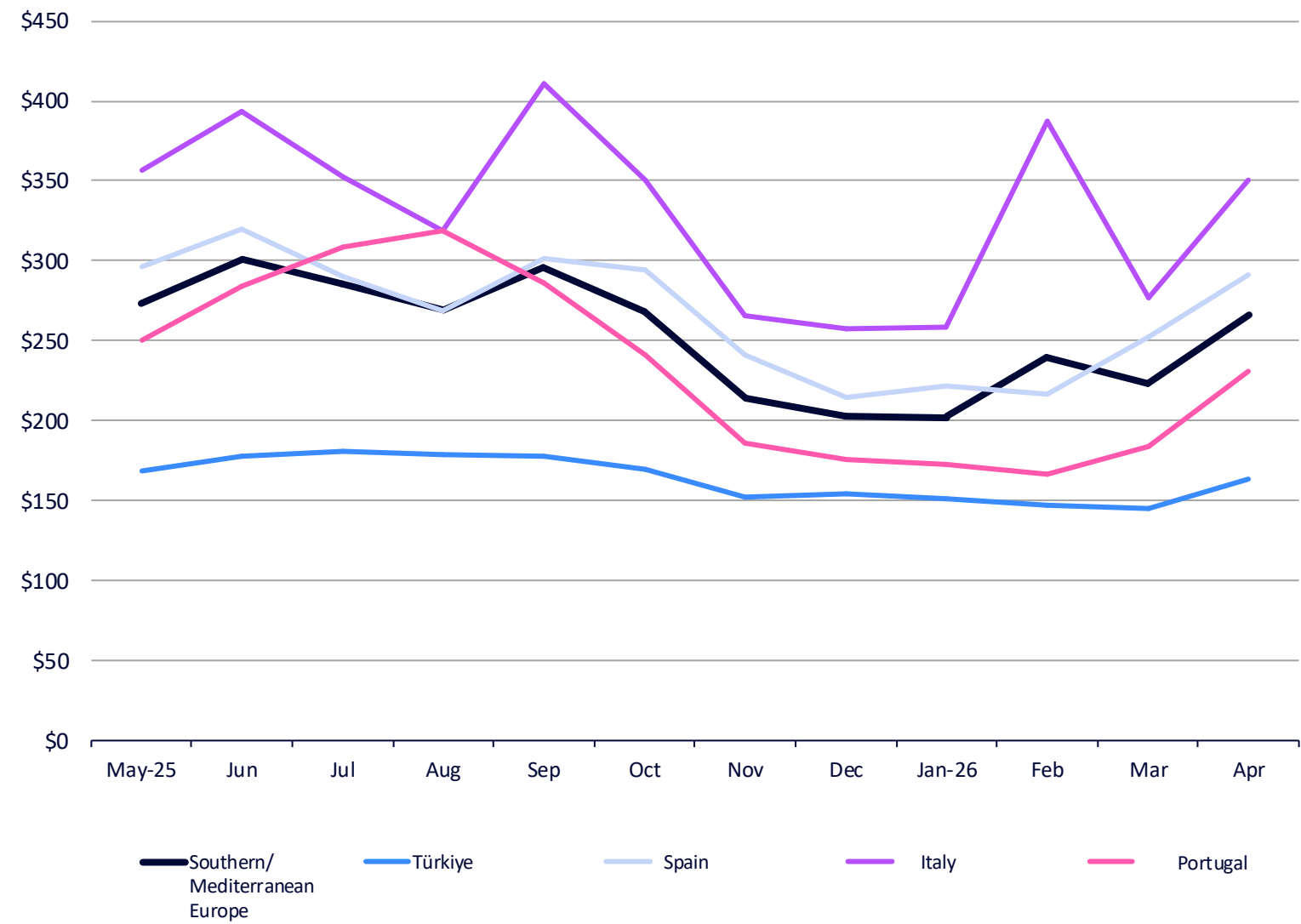


Hotel Segmentation in Southern/Mediterranean Europe

On-the-books distribution for May 2026 vs May 2025



Average Daily Rate (ADR) in USD



Occupancy overview analysis

Occupancy peaks in early autumn, in line with the region's seasonal pattern

Regional occupancy held in the ~70–79% range from May through October, peaking at ~79% in September before easing to its winter low (~53% in January). This gives Mediterranean destinations a clear high-season window for performance optimization.

Southern Europe demand remains well-balanced across channels, with direct channels driving a large share

The channel mix remains highly stable year-over-year, with Direct and Brand.com representing the majority of bookings (~65–70%). This strong reliance on direct channels highlights effective distribution strategies and continued opportunities to drive higher-margin bookings.

Segmentation remains consistent, supporting predictable demand and revenue planning

The segment mix shows minimal variation year-over-year, with Discount, Group, and Retail continuing to dominate the distribution. This stability reinforces a reliable demand structure, enabling more precise forecasting and targeted commercial actions.

Dynamic pricing across Mediterranean markets highlights strong optimization potential

ADR trends vary significantly by country, with markets like Italy reaching higher peaks (up to ~\$400+), while others such as Türkiye operate at lower price points. This variation, alongside stable demand, creates clear opportunities to refine pricing strategies and maximize revenue across different market profiles.

Glossary for Southern/ Mediterranean Europe

Destination name	Subregion
Croatia	Southern/Mediterranean Europe
Greece	Southern/Mediterranean Europe
Israel	Southern/Mediterranean Europe
Italy	Southern/Mediterranean Europe
Malta	Southern/Mediterranean Europe
Portugal	Southern/Mediterranean Europe
Serbia	Southern/Mediterranean Europe
Slovenia	Southern/Mediterranean Europe
Spain	Southern/Mediterranean Europe
Türkiye	Southern/Mediterranean Europe



Western Europe

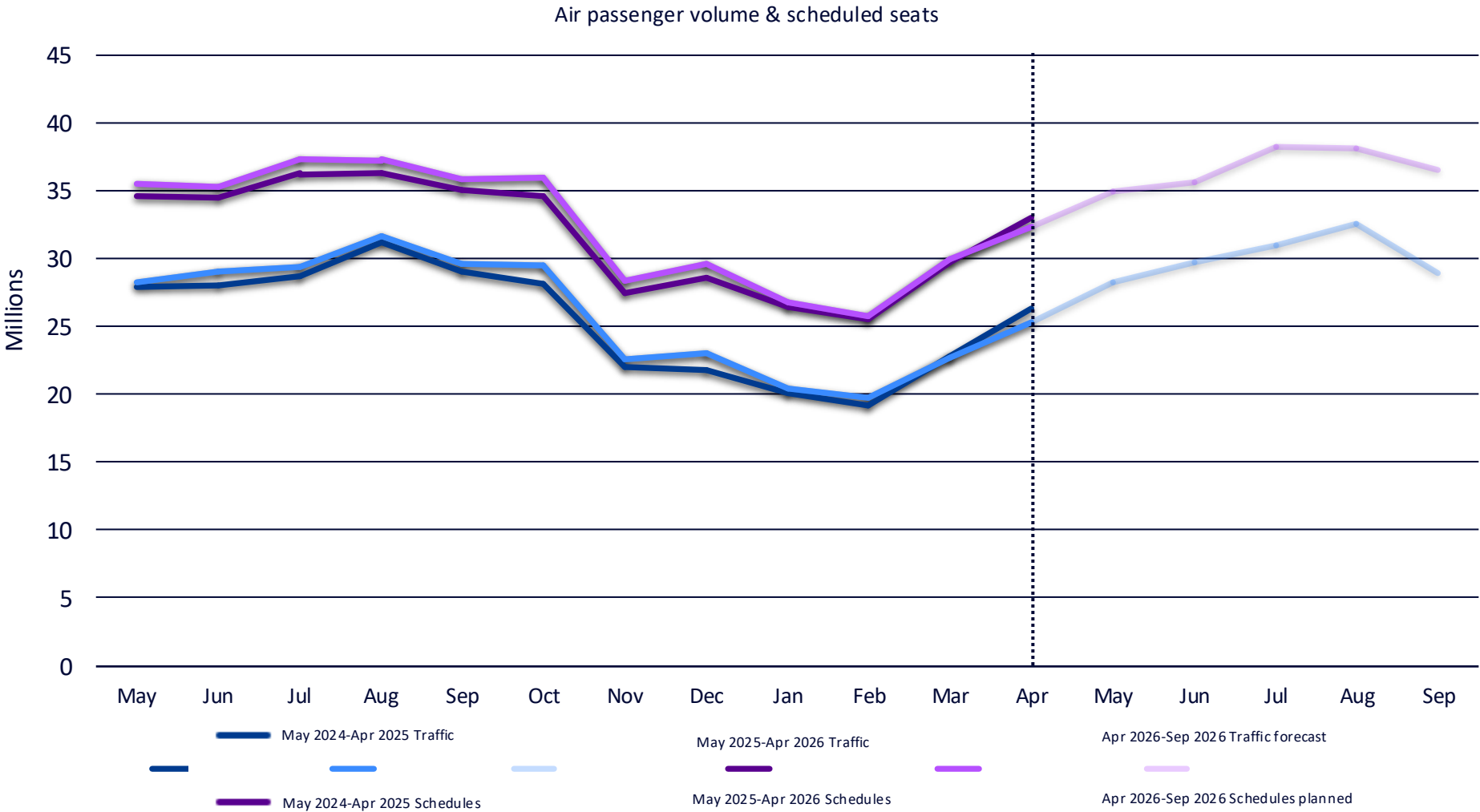


Air Travel Overview



Worldwide to Western Europe

Passenger traffic and capacity



1.9%

year-on-year growth
in passenger traffic

Passenger traffic to Western Europe ticked up 1.9% year-on-year, recovering gradually after the winter. The incremental capacity being added into summer 2026 suggests airlines are sizing supply to moderate demand signals rather than anticipating a stronger rebound.

Where do visitors come from?

Reality vs. aspirations

Top origin markets **searching** for Western Europe

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 ranking
United States	1	1
United Kingdom	2	2
Spain	3	3
Italy	4	4
France	5	5
Germany	6	6
Türkiye	7	7
China	8	8
Canada	9	9
India	13	10

Top origin markets **traveling** to Western Europe*

Origin market	May.24-Apr.25 ranking	May.25-Apr.26 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	8	8
Portugal	9	9
Morocco	11	10

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"



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

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

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Japan	1	60%
Egypt	2	55%
India	3	49%
Thailand	4	48%
China	5	45%
Indonesia	6	42%
Canada	7	41%
Morocco	8	41%
United States	9	37%
Republic of Korea	10	37%

Top origin markets **traveling** to Western Europe* with the highest growth (among the TOP 30)

Origin market	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Japan	1	17%
Egypt	2	12%
Denmark	3	10%
Australia	4	8%
Morocco	5	8%
United Emirates	6	7%
Spain	7	5%
Canada	8	4%
Thailand	9	2%
Switzerland	10	2%

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026





Where do people travel to in Western Europe?

Reality vs aspirations

Top **searched** destinations in Western Europe

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
France	1	1
Germany	2	2
Netherlands	3	3
Switzerland	4	4
Austria	5	5
Belgium	6	6
Luxembourg	7	7
Monaco	8	8
Liechtenstein	9	9

Top **booked** destinations in Western Europe*

Destination	May.24-Apr.25 ranking	May.25-Apr.26 ranking
France	1	1
Germany	2	2
Netherlands	3	3
Switzerland	4	4
Belgium	5	5
Austria	6	6
Luxembourg	7	7
Liechtenstein	8-9	8-9
Monaco	8-9	8-9

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Top performing destinations in Western Europe

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking	YoY Growth
Switzerland	1	36%
Belgium	2	32%
Netherlands	3	30%
Germany	4	29%
Austria	5	28%
Luxembourg	6	25%
France	7	24%
Liechtenstein	8	13%
Monaco	9	7%

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

Destination	May.25-Apr.26 vs May.24-Apr.25 ranking
Belgium	1
Luxembourg	2
France	3
Germany	4
Netherlands	5
Switzerland	6
Austria	7

* The above ranking of origin markets is based on bookings through GDS and therefore not representative of the full market"

Air Travel overview analysis

Passenger traffic and airline capacity are expanding in lockstep, signalling sustained carrier confidence

Western Europe logs ~1.9% year-on-year passenger traffic growth, with airline schedules for Apr-Sep 2026 showing planned seat increases that match demand.

A consistent top-5 origin base anchors demand while emerging markets gain ground

The top booked origins — the United States, France, Germany, the United Kingdom and Italy — kept their rankings year on year, while Morocco climbed from #11 to #10. This stability at the top, combined with healthy entry from regional gateways, gives destinations a predictable revenue base with fresh upside from new entrants to plan around.

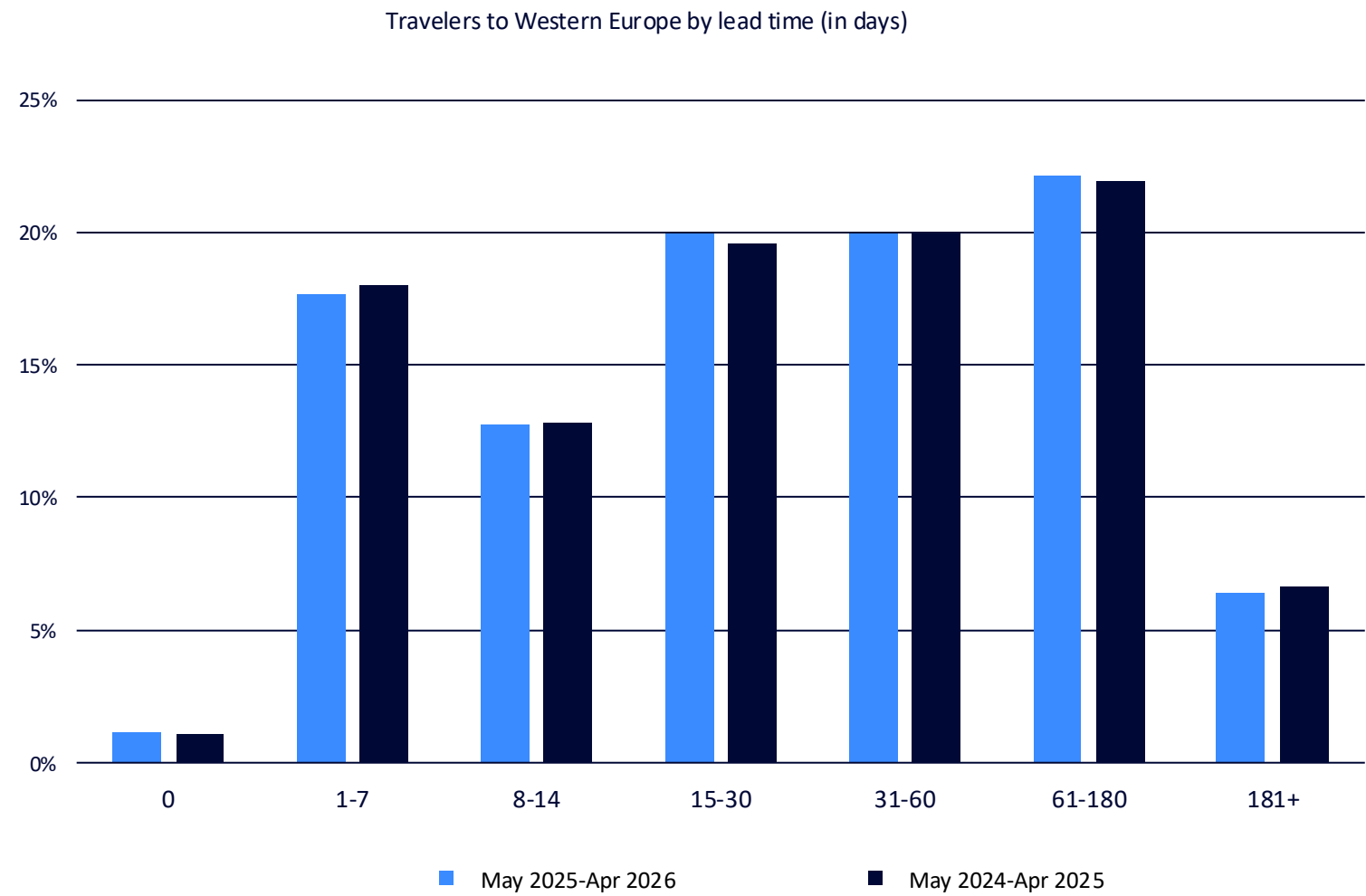
Long-haul search momentum points to a major opportunity to broaden the visitor mix

Searches for Western Europe are surging from Japan (+60%), Egypt (+55%), India (+49%), Thailand (+48%) and China (+45%), with Japan also showing booking traction at +17% YoY. This is a clear long-horizon opportunity to convert rising search interest into sustained, diversified visitor growth.

Search interest is strongest across Switzerland, Belgium and the Netherlands

Searches for Switzerland (+36%), Belgium (+32%) and the Netherlands (+30%) lead growth across the region's top destinations, with Germany (+29%), Austria (+28%) and Luxembourg (+25%) close behind. Travelers are exploring across the region, creating room for every destination to showcase its distinct positioning and expand visibility.

Air Travel Bookings to Western Europe by Lead Time



Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026

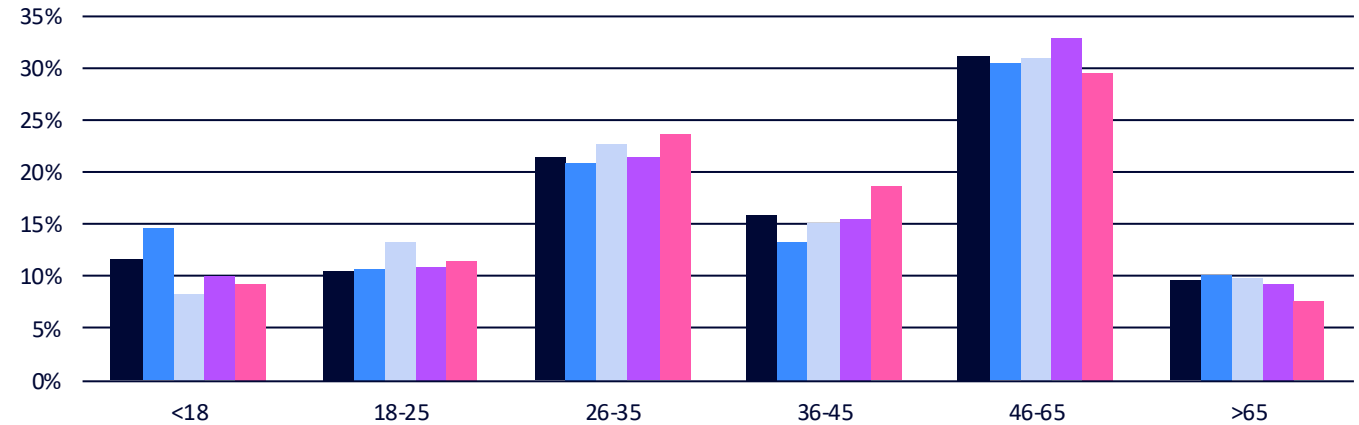




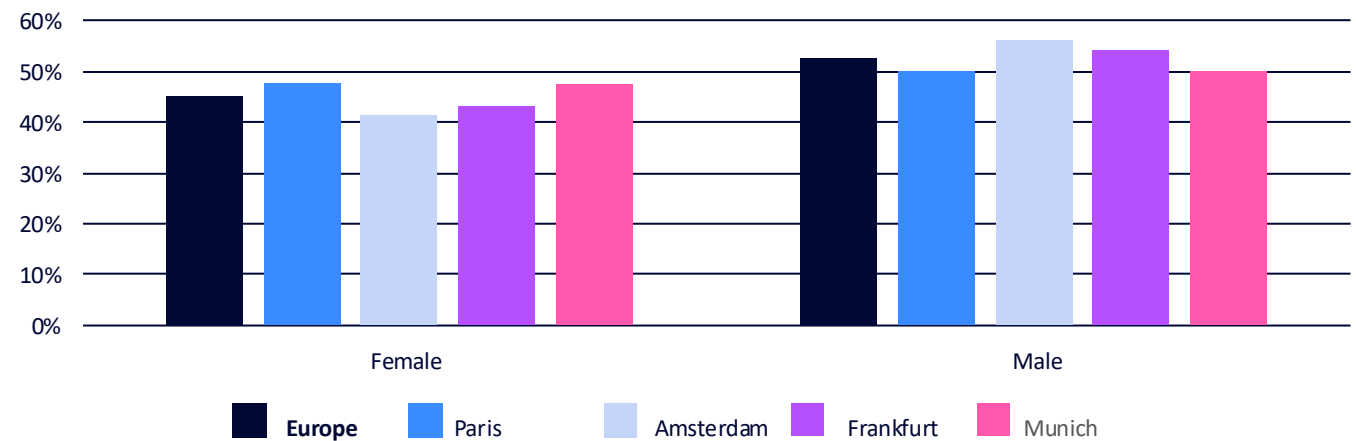
What type of Travelers travel to Western Europe

Top destinations

Travelers to Western Europe by age category



Travelers to Western Europe by gender



636 new routes in Western Europe

Top new international routes (based on seat capacity)

Origin market	New routes
Italy	53
Spain	37
Greece	29
Germany	28
Morocco	28
France	25
Romania	25
Saudi Arabia	22
United Kingdom	22
Türkiye	19
Poland	18
Austria	16

New routes	Origin market	Destination market
ORL-PAR	United States	France
SFO-VIE	United States	Austria
HKG-MUC	Hong Kong (China)	Germany
MCT-AMS	Oman	Netherlands
SHA-GVA	China	Switzerland
SIN-VIE	Singapore	Austria
HKG-BRU	Hong Kong	Belgium
HYD-AMS	India	Netherlands
GEO-AMS	Guyana	Netherlands
SYX-FRA	China	Germany
SAN-AMS	United States	Netherlands
PTY-FRA	Panama	Germany



Lead time, profile and connectivity analysis

Long-lead bookings dominate, giving destinations strong forward-planning visibility

Around ~49% of trips to Western Europe are booked 31+ days ahead, with the 61-180 day window forming the single largest bracket at ~22%. This early-decision behavior translates into clearer pricing power, well-timed campaign investment and confident capacity allocation.

Mid-window bookings form the conversion sweet spot for marketing campaigns

Roughly ~40% of trips fall within the 15-60 day window, the optimal range for remarketing, dynamic packaging and themed weekend offers. Destinations can engage Travelers exactly as they finalize their itineraries.

Western Europe's traveler profile skews experienced and high-spend

The 46-65 age group leads the mix at ~31%, with strong representation across Munich, Frankfurt, Paris and Amsterdam. Combined with the 26-35 cohort at ~21%, this blend signals higher purchasing power alongside engaged younger Travelers — a strong foundation for premium, cultural and experiential offers.

Route expansion signals accelerating connectivity growth into Western Europe

636 new routes have launched into Western Europe, with Italy (53), Spain (37) and Greece (29) leading origin markets alongside Germany (28) and Morocco (28). Long-haul connections from the US, China, Hong Kong (China) and Singapore further diversify the inbound mix, reinforcing the region's growing appeal as a global destination.

Hospitality Occupancy Overview



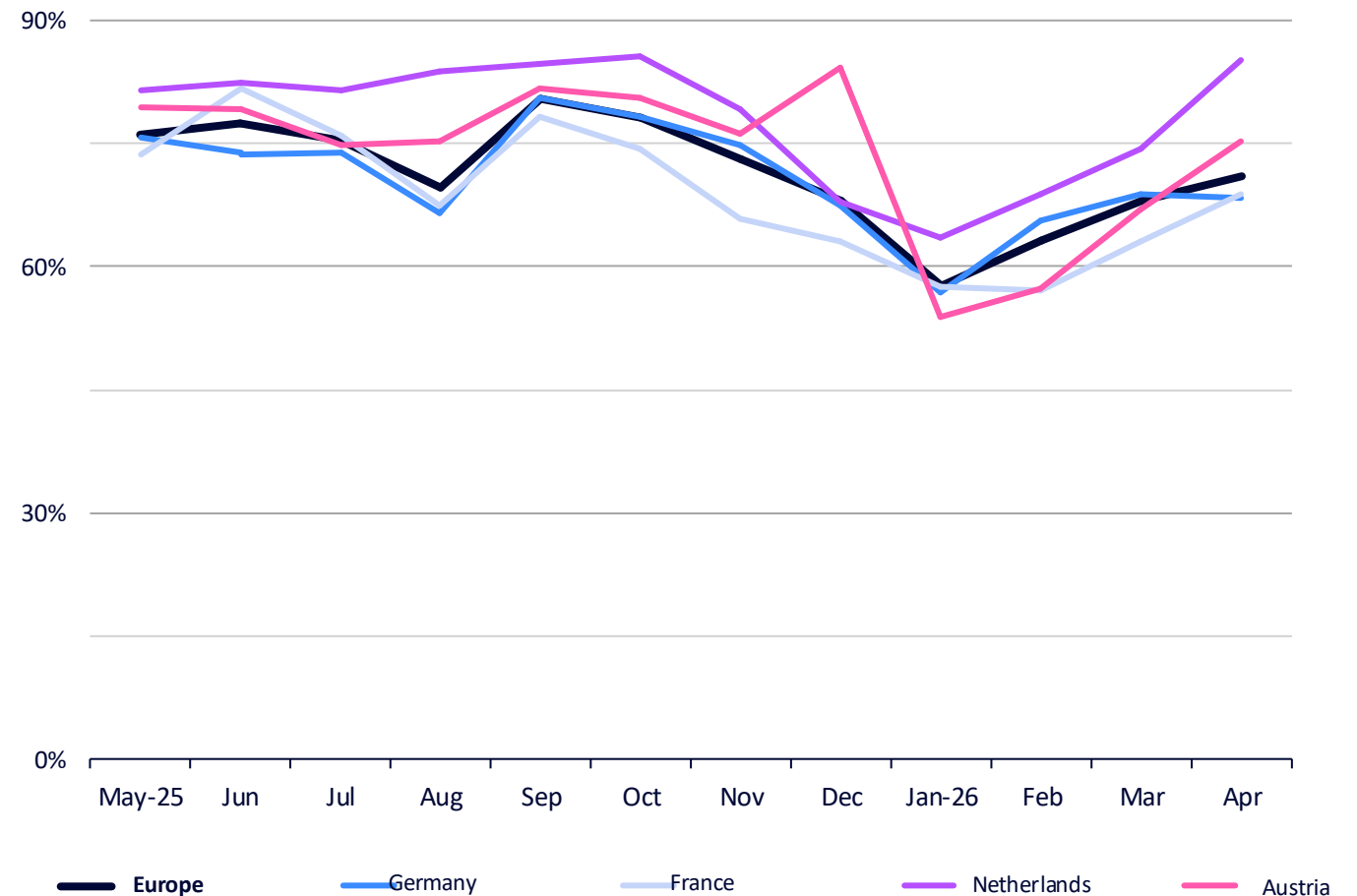
Hotel Occupancy in Western Europe



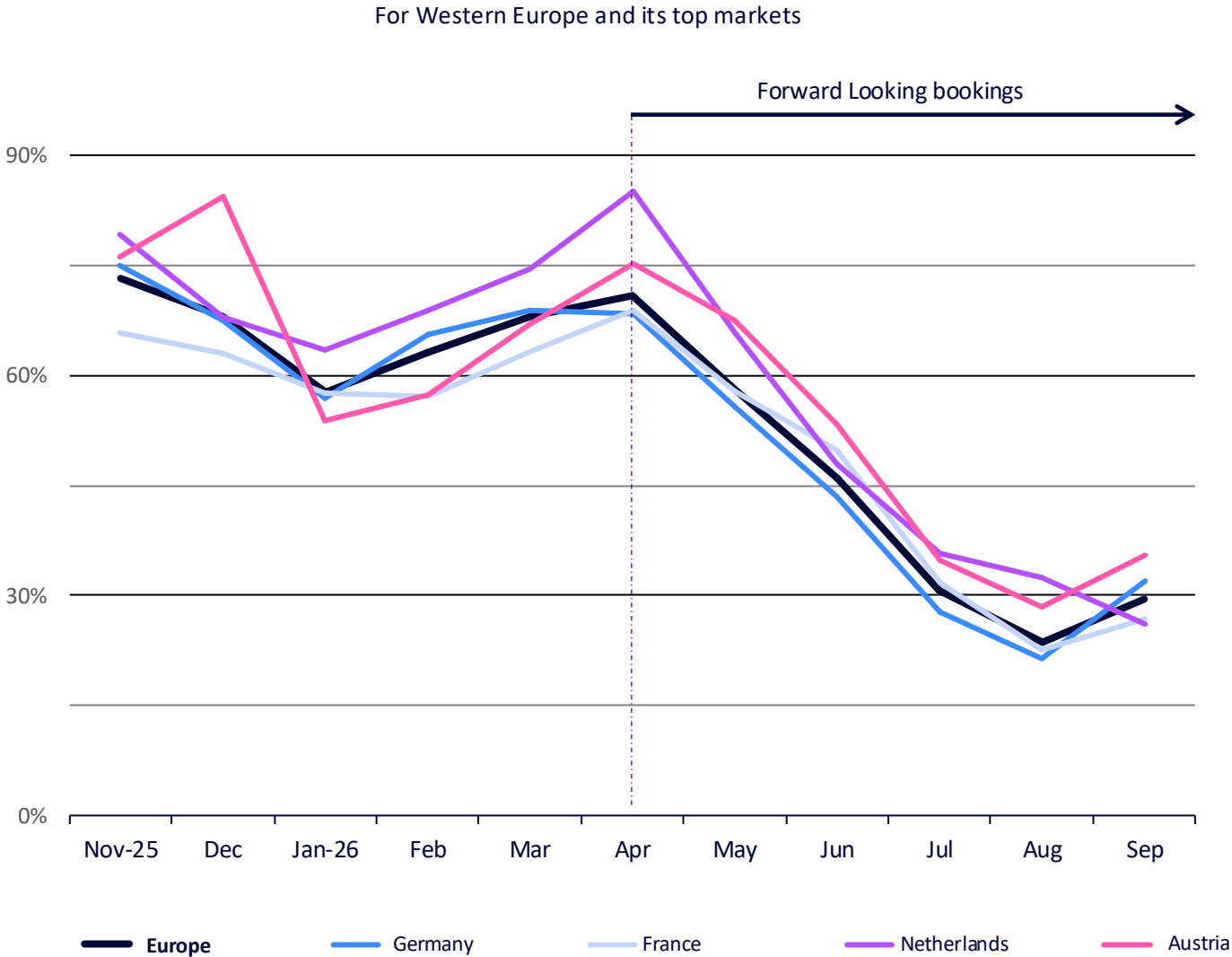


Hotel Occupancy for the past 12 months

For Western Europe and its top markets



Hotel Occupancy On-the-Books

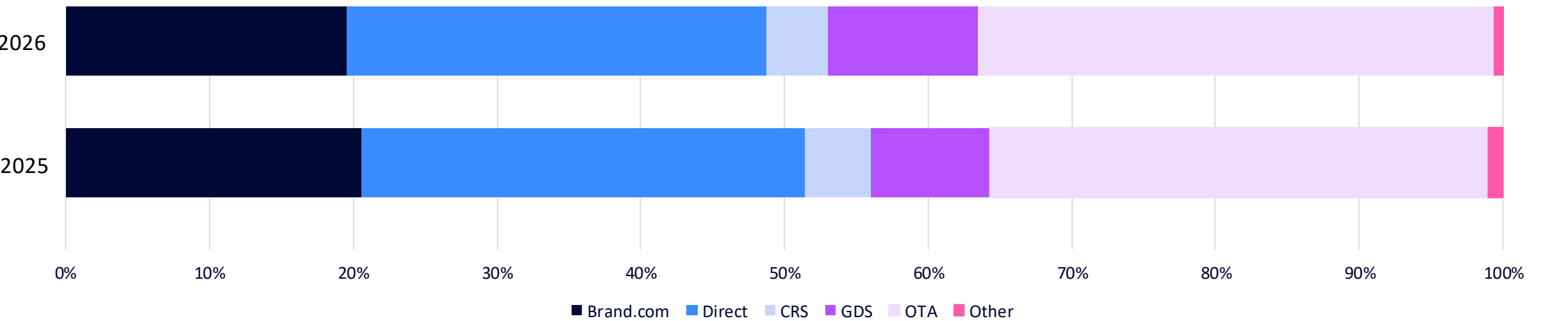


Source: Amadeus Destination Gateway™ as of Sunday, 3 May 2026



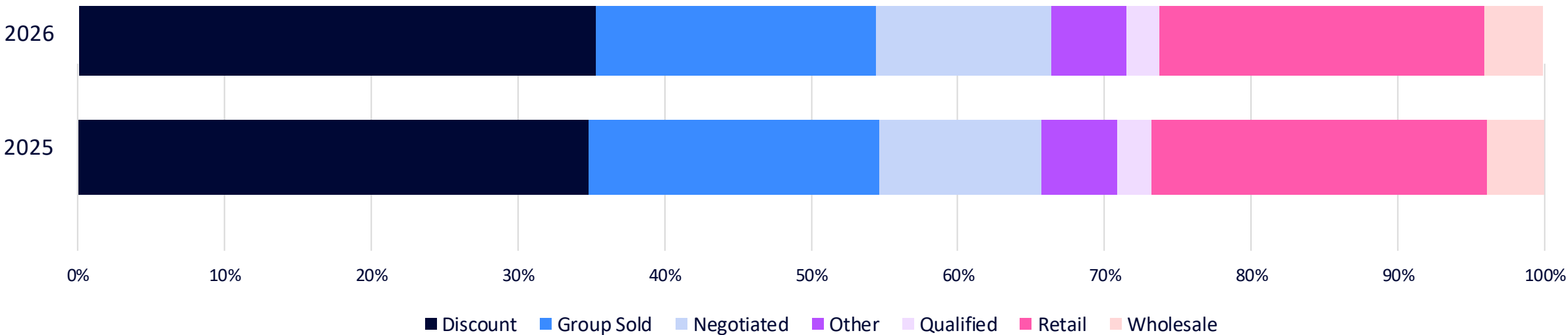
Hotel Channel mix in Western Europe

On-the-books distribution for May 2026 vs May 2025

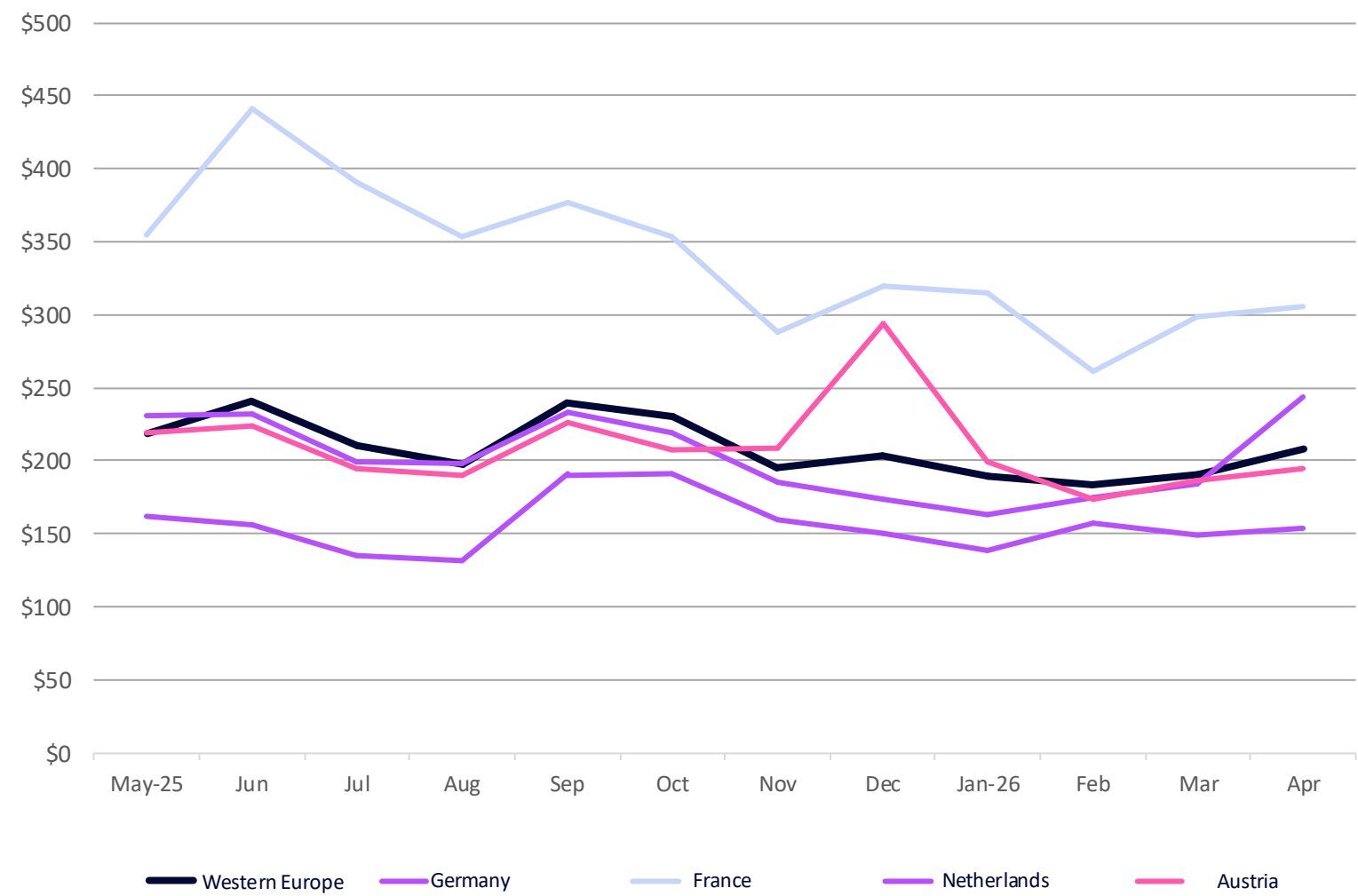


Hotel Segmentation in Western Europe

On-the-books distribution for May 2026 vs May 2025



Average Daily Rate (ADR) in USD



Occupancy overview analysis

Western Europe maintains stable occupancy with clear seasonal structure

Occupancy levels remain consistent across the year (~60–75%), with well-defined peaks in late summer and early autumn and a dip at the start of the year. This predictable pattern reinforces a stable demand environment and supports planning and forecasting.

Forward bookings show consistent patterns across markets, with recovery building after summer

On-the-books data highlights a synchronized dip across all key markets post-April, followed by a gradual pickup toward September. This indicates a common booking curve across the region, offering clear timing windows for demand stimulation.

Demand is well-balanced across segments, with slight shifts creating optimization opportunities

Segment distribution remains largely stable year-over-year, with Discount and Retail continuing to represent the largest shares. Minor shifts across segments suggest opportunities to fine-tune mix strategies and maximize revenue performance.

ADR remains dynamic across markets, reflecting strong pricing opportunities despite variability

Average Daily Rate varies significantly by market, with France consistently leading at higher price points and other markets showing more fluctuation. This variability highlights opportunities for targeted pricing strategies depending on market positioning and demand cycles.

Glossary for Western Europe

Destination name	Subregion
Austria	Western Europe
Belgium	Western Europe
France	Western Europe
Germany	Western Europe
Luxembourg	Western Europe
Netherlands	Western Europe
Switzerland	Western Europe

