Issue Brief

Destination Europe – Where to from here?

Executive Summary

Europe has long been the world's most visited region – a mosaic of iconic cities, quiet villages, ancient cultures, and striking landscapes that continues to capture the imagination of travellers and those yet to join their ranks. Yet its long-standing leadership can no longer be taken for granted.

Global competition for long-haul visitors is intensifying, traveller expectations are shifting, and digital discovery is reshaping how people choose where to go. The question is no longer whether travellers want to visit Europe, but why they should choose it over an ever-growing range of options – and what will inspire them to return.

New research conducted by Statista in partnership with Booking.com shows that for many long-haul travellers, Europe is not experienced as a single destination, but rather as a collection of individual countries, cities, and iconic places. This distinction becomes more pronounced with travel experience, as familiarity shifts attention from the idea of Europe to the characteristics of particular destinations.

Market differences also matter. In most countries surveyed – from the United States to Brazil and China – travellers gravitate towards specific destinations, while Japan stands out as an exception, with a greater share of respondents viewing Europe as a single cultural space.

What draws travellers to Europe is strikingly consistent. Its cities, heritage, cultural depth and culinary traditions continue to set it apart. What has changed is how that appeal is interpreted.

Travellers approach Europe through the lens of the experience economy, seeking meaning, immersion and individual relevance rather than off-the-shelf sightseeing. In this context, Europe's diversity becomes its greatest strength. The continent does not offer a single narrative, but the potential for highly personalised journeys. What was once an unrealistic ambition has become a baseline expectation, particularly among Millennials, Gen Z and the emerging Gen Alpha.

The way travellers discover Europe has transformed as well. Online channels now shape the earliest stages of decision-making: search engines, social media, online reviews, and creator content guide expectations long before a trip is booked. As a result, Europe is increasingly explored digitally before it is experienced physically, with travellers arriving already oriented towards specific places rather than a broad continental ideal.

Taken together, these shifts point to a clear implication: Europe's competitiveness increasingly depends on how well its diversity is made legible to travellers. A compelling continental narrative still matters, but it must work alongside strong destination-level differentiation.

Local authenticity, distinctiveness, and ease of exploration will shape travel choices, while seamless mobility and reliable digital information will influence how confidently visitors move between places. For policymakers and industry leaders alike, the task is not to redefine Europe's appeal, but to enable its discovery and navigation in ways that keep pace with changing travel expectations.

The World's Favourite Continent – For Now

With its wealth of culture, history, natural landscapes and relative ease of accessibility, Europe has naturally established itself as one of the most popular tourism destinations in the world. Its great diversity also supports a well-established intra-European travel scene that reinforces a common European identity. Together, these factors contribute to travel a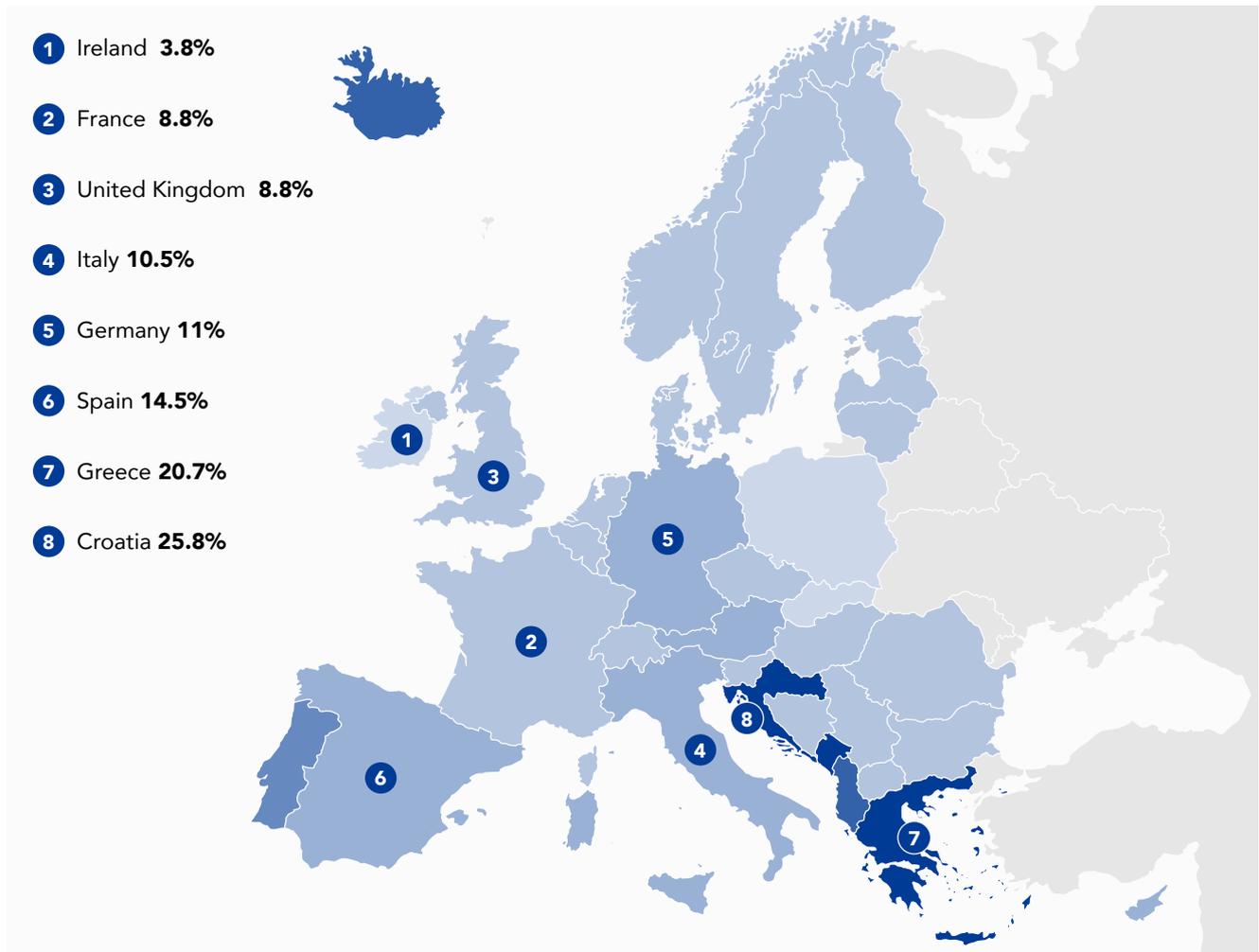nd tourism's status as a key pillar of the European economy – generating jobs and income, stimulating regional development, and supporting local communities.

The direct and indirect contributions from the European tourism ecosystem amount to around 10% of the region's GDP[1] but this share is much higher in well-known tourist hotspots like Greece, Portugal, and Croatia.

The latter of which sees a direct and indirect tourism contribution of more than 25%. Not only do travellers from around the world flock to European destinations each year for their own leisure, the well-established tourism industry is relied upon by thousands of businesses and millions of local employees.

Share of national GDP generated by travel and tourism in 2023

0% 30%

1. Ireland **3.8%**
2. France **8.8%**
3. United Kingdom **8.8%**
4. Italy **10.5%**
5. Germany **11%**
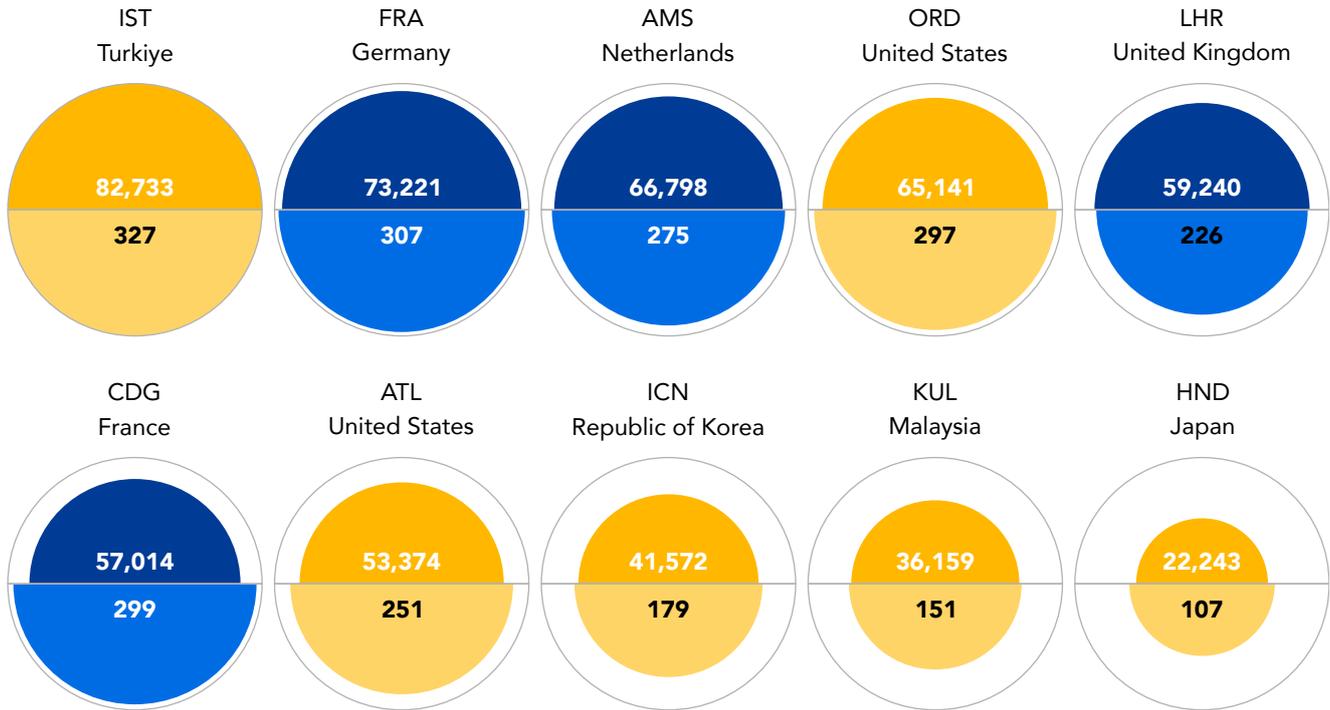6. Spain **14.5%**
7. Greece **20.7%**
8. Croatia **25.8%**

Note: Direct and indirect tourism contributions not only include visitor spending on accommodation, transport, food services, and attractions, but also capital investment in tourism-related infrastructure, government spending on tourism-supporting services, supply-chain purchases by tourism industries, and the consumption spending of workers whose jobs are supported by tourism activity.
Source: World Travel & Tourism Council (WTTC)

1. WTTC, Travel & Tourism Economic Impact Research

Top 10 most connected airports worldwide

● Europe ● Rest of world ◉ Connections ◉ Destinations

IST Turkiye	FRA Germany	AMS Netherlands	ORD United States	LHR United Kingdom
82,733 / 327	73,221 / 307	66,798 / 275	65,141 / 297	59,240 / 226

CDG France	ATL United States	ICN Republic of Korea	KUL Malaysia	HND Japan
57,014 / 299	53,374 / 251	41,572 / 179	36,159 / 151	22,243 / 107

Source: OAG, Top 10 Megahubs 2025 (sorted by number of connections)

In addition to the countries and regions with a high reliance on tourism for their economy, Europe has a number of "hero" locations and cities that command a higher tourism density, such as Dubrovnik, Venice, and the Balearic Islands. These locations act as important international draw cards for intra-European and international travel throughout the region – not just as popular locations, but as "jumping off points" or hubs for international visitors throughout the region. London, Frankfurt, and Amsterdam are examples of such hubs as they boast major international airports with extensive connecting flights, road, and public transport infrastructure that allow travellers to get to other locations in Europe with relative ease.

Europe's shifting position in the global travel landscape

It is precisely this accessibility that has been a cornerstone of Europe's long-held status of the top travel destination – further supported by a healthy domestic and intra-European tourism industry. However, as the world becomes increasingly globalized

and the middle class expands in leaps and bounds, international travel is gaining popularity further bolstering domestic and intraregional tourism flows.[2] The end result is a growing share of international components in a growing market and many destinations are becoming increasingly more accessible in a way that directly competes with Europe's attraction.

International travel is expanding faster than domestic travel

● Interregional ● Intraregional ● Domestic

2023

16%	25%	59%	27.4bn

2030

19%	30%	51%	38.7bn
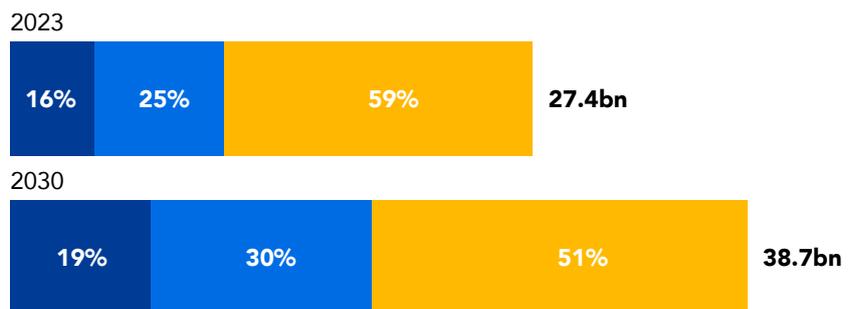
Source: McKinsey, 2024

2. McKinsey, The State of Tourism and Hospitality

European Tourism stands at a juncture. The reality is that European tourism is not isolated from the global market and is experiencing increasing competition from other destinations for modern tourists. Many elements that have made Europe unique in the past, such as its safety, accessibility and cultural mix are no longer key differentiators in the modern – post-internet – travel ecosystem. To remain relevant European tourism must look outwardly at its competitors, understand what travellers want from their destination experience, and create points of differentiation, rather than selling a generic European ideal.

More than one way to define global tourism leadership

France
World's leading destination – over 100 million international visitors in 2024[3]

United States
Number 1 in tourism revenue – $181 billion in international visitor spending in 2024[4]

China
Major contributor to international tourism – $140 billion in outbound tourism expenditure in 2024[5]

Brazil
Tourism growth contributor in Latin America – Visitors to Brazil grew 45% in the first three quarters of 2025 compared to the same time in 2024[6]

United Arab Emirates
Heavy investment in tourism development – in 2024, hotels and tourism accounted for 14% of foreign direct investment in Dubai, the equivalent of $2 billion[7]

Source: French Tourism Ministry; OAG; WTTC; Global news wire; Visit Latin America, Skift, Money-tourism

3. French Tourism Ministry, Press Release
4. WTTC, Press Release
5. Global news wire, China's Outbound Tourism Trends and Future Projections 2025-2033
6. Visit Latin America, Tourism in Latin America: growth confirmed, maturity taking hold
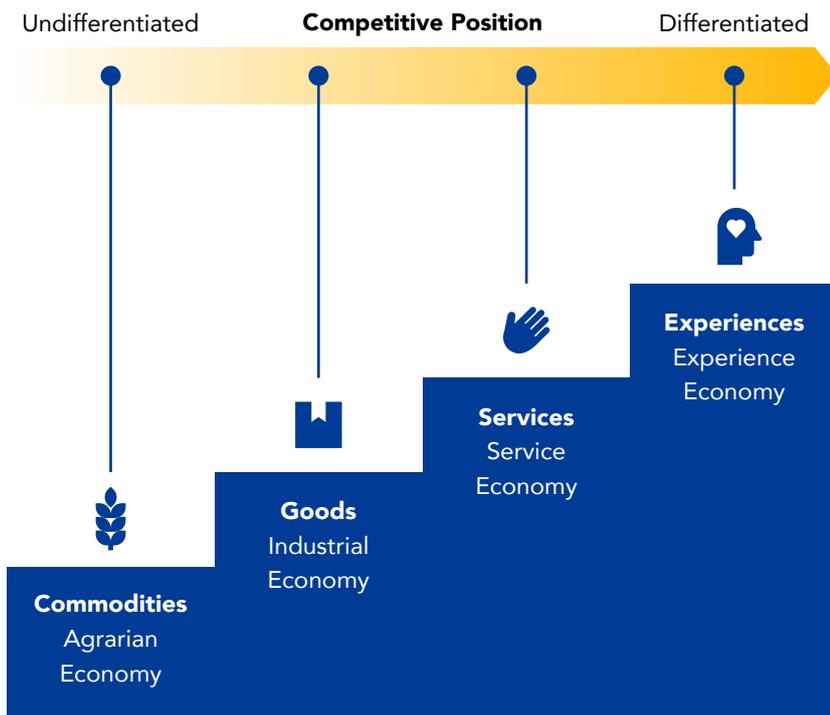7. Skift, Dubai Attracts Record Foreign Investment; Money-tourism, Dubai attracts $2 billion in tourism investments

Europe: One Idea, Many Destinations, More Experiences

As the Harvard Business Review's landmark article "Welcome to the Experience Economy" argues, economies evolve from extracting commodities to providing goods and services, to ultimately staging experiences – each step adding personalization, immersion, and emotional resonance. Tourism exemplifies this shift. Leisure travel – distinct from transport, retail, or agriculture's utilitarian origins – exists to deliver enjoyment, inspiration, and exploration. Its core value has always been experiential.

With economic competitiveness waning and growth slowing, it is time to reignite Europe's momentum within the experience economy. The recent Draghi report has underscored the urgency of structural reforms and renewed investment to restore Europe's leadership in the global economy. As the EU's fifth largest sector in terms of employment and value added[8] a revised model for European tourism should focus on delivering high-quality, authentic experiences, powered by a skilled workforce. Furthermore, it should be naturally integrated into local economies, and leading in technology adoption and sustainability. Such a model should adapt to the changing tastes of travellers in a globalized, post-COVID world, react to global competition for tourism, and serve to diversify from the tried and tested tourist attractions of the past.

Experiences are a means to differentiation in the global economy

Source: Harvard Business Review, Welcome to the experience economy

Island Mainau, Lake Constance, Germany

8. European Commission, Statista
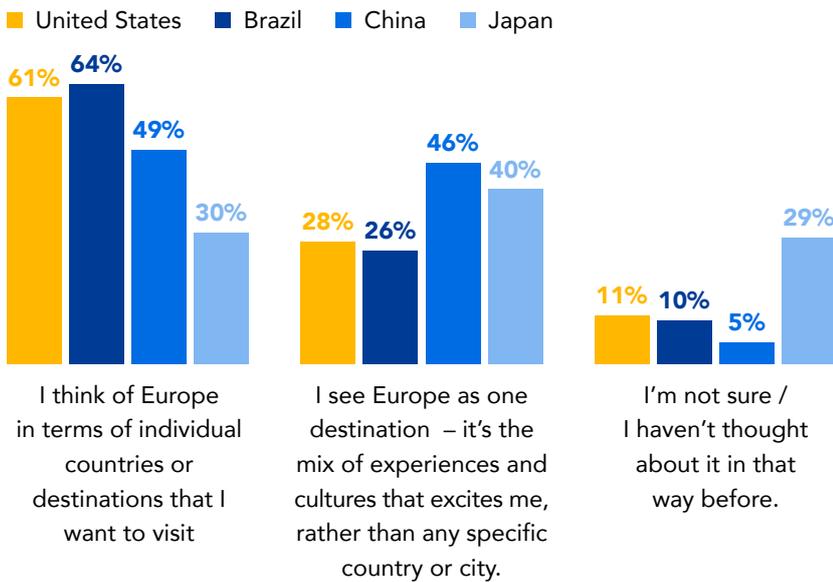
How travellers perceive Europe

In partnership with Booking.com, Statista surveyed long-haul travellers to understand how people around the world conceptualize a trip to Europe. The findings show that most visitors from the U.S., China, and Brazil think of Europe primarily through individual countries or iconic destinations – Swiss Alps, Athens, Colosseum – rather than as a single, unified place.

Japan stands out as the exception: Japanese respondents were more likely to view Europe as one destination defined by its cultural mix rather than by specific countries. These patterns suggest that while a broad "Europe" brand has value for some markets, destination marketers will be most effective when they emphasise the distinctiveness of individual countries and cities, and reserve continent-wide branding for areas where Europe's cohesion matters – such as cross-border rail, heritage routes, or nature networks.

A similar divide emerges when comparing travellers by their level of experience. Those who have visited Europe before are far more likely to think in terms of individual destinations: 60% say they associate Europe with specific countries or cities, compared with 46% of people who have travelled abroad but not to Europe, and 38% of those who have never travelled at all.

Meanwhile, first-time or inexperienced travellers are more likely to think of Europe in generalised terms, or to admit they have not considered the distinction. This suggests that familiarity with the region reinforces destination-specific thinking: the more travellers explore Europe, the more they differentiate between and seek out particular experiences. For attracting repeat visitors, promoting individual destinations – and the variety between them – appears especially important.

51% of all respondents thought of Europe in terms of the individual countries they wanted to visit compared to 35% who were attracted by Europe as a homogenized concept.

Perception of Europe, by nationality

■ United States ■ Brazil ■ China ■ Japan

Note: n=2,038
Source: Statista, Destination Europe Survey 2025

Perception of Europe, by experience of Europe

■ Visited Europe previously
■ Never been to Europe but has travelled abroad
■ Never travelled abroad

I think of Europe in terms of individual countries or destinations that I want to visit

38% 46% 60%

I see Europe as one destination – it's the mix of experiences and cultures that excites me, rather than any specific country or city.

22% 39% 41%

I'm not sure /
I haven't thought about it in that way before.

2% 13% 40%

Note: n=2,038
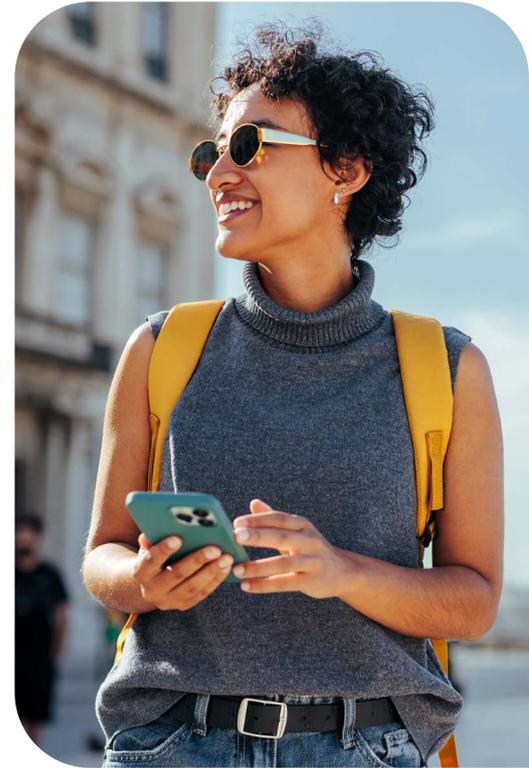Source: Statista, Destination Europe Survey 2025

What Motivates Long-Haul Travellers to Visit Europe?

At the heart of a renewed European tourism model is a clearer understanding of what international travellers want as individuals – not only when they consider Europe, but when they plan any trip at all.
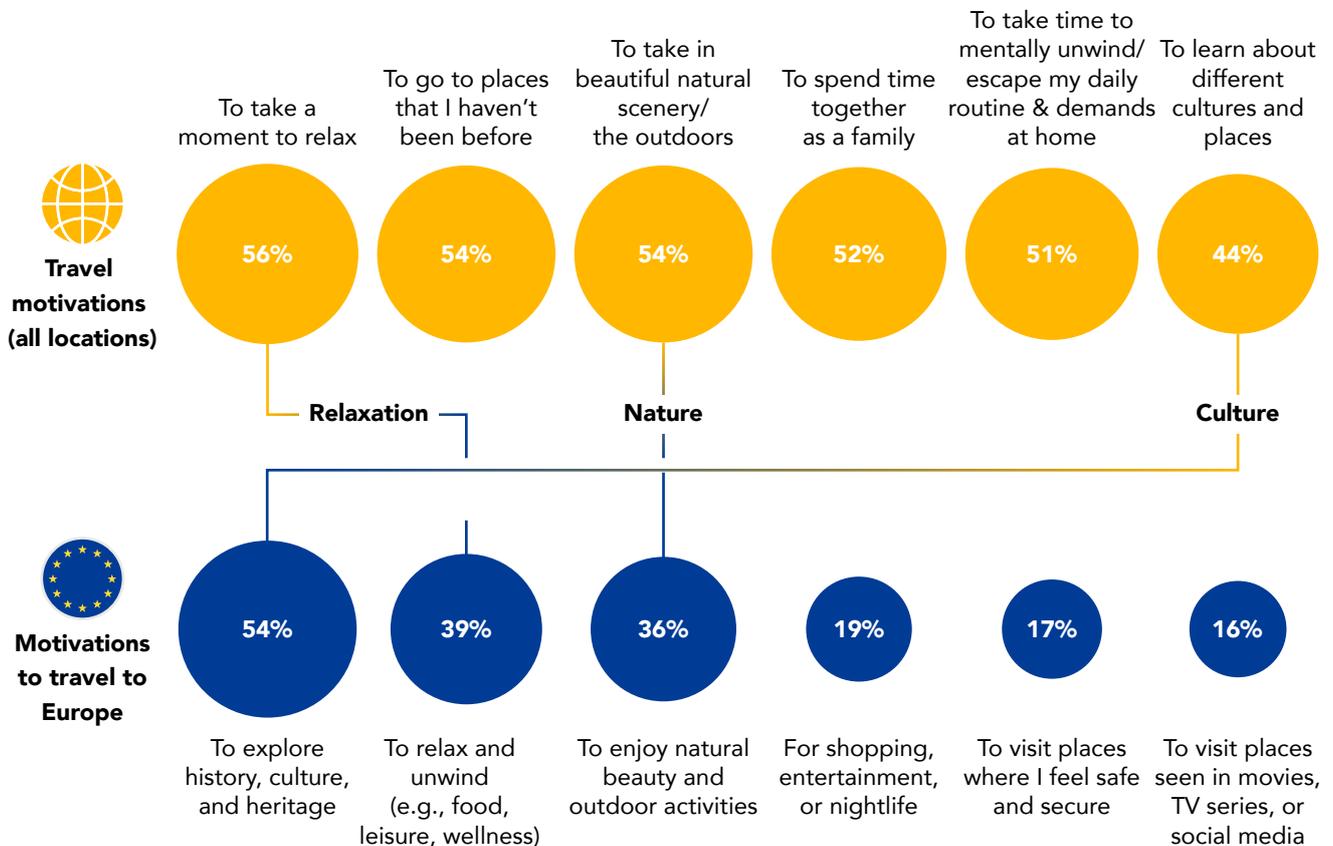
The survey findings show that, much like their perceptions of Europe itself, travellers also carry preconceived notions about what a European trip entails, whether or not they have visited the region before. While many of these expectations are positive, long-standing ideas about "European travel" can also obscure lesser-known aspects of the region that may resonate with a broader and more diverse audience. In other words,

much of Europe's untapped tourism potential remains under-recognised rather than absent.

This becomes evident when comparing two traveller surveys conducted in 2025. When asked specifically about Europe, history and culture emerge as the dominant motivations for travel, reinforcing Europe's traditional image. Yet when travellers reflect on their travel motivations more generally, relaxation and enjoying the outdoors rank ahead of cultural experiences. This contrast suggests that Europe is often associated with a narrower set of experiences than travellers seek overall.

Leading travel motivations vs motivations to visit Europe

	To take a moment to relax	To go to places that I haven't been before	To take in beautiful natural scenery/ the outdoors	To spend time together as a family	To take time to mentally unwind/ escape my daily routine & demands at home	To learn about different cultures and places
Travel motivations (all locations)	56%	54%	54%	52%	51%	44%
	Relaxation		Nature			Culture
Motivations to travel to Europe	54%	39%	36%	19%	17%	16%
	To explore history, culture, and heritage	To relax and unwind (e.g., food, leisure, wellness)	To enjoy natural beauty and outdoor activities	For shopping, entertainment, or nightlife	To visit places where I feel safe and secure	To visit places seen in movies, TV series, or social media

The Enduring Allure of Cities, Culture, and Cuisine

Europe's reputation as a historical and cultural destination continues to elevate its most iconic cities and countries as must-see locations, reinforcing established travel patterns and concentrating demand. At the same time, this reputation can overshadow alternative and lesser-known attractions, potentially discouraging travellers whose interests lie elsewhere – particularly those unfamiliar with the region.
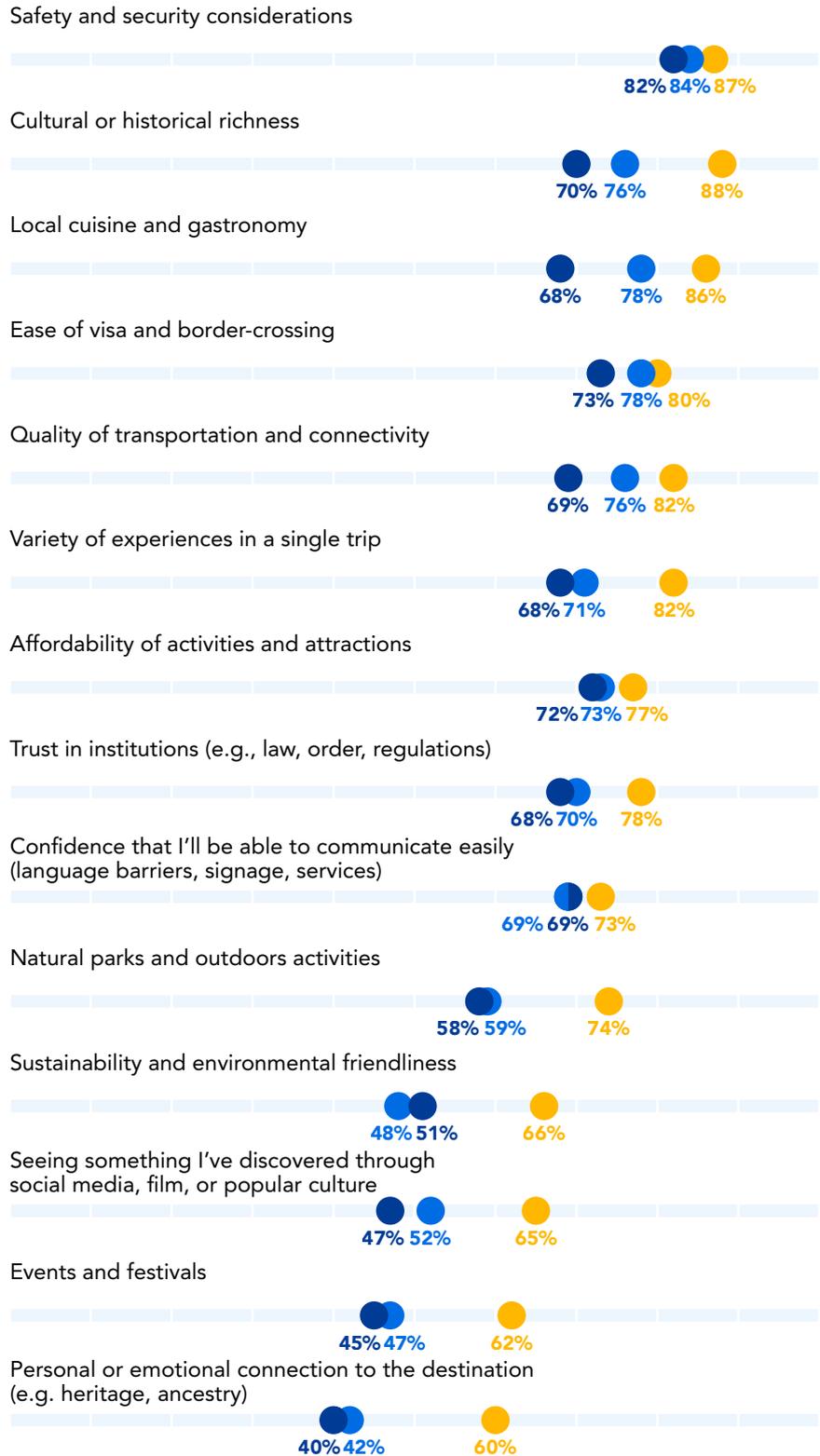
The gap is most pronounced when it comes to nature-based tourism. Among respondents who have visited Europe, 74% cite national parks and outdoor activities as factors in choosing to travel to the region, compared with just 59% of those who have not. Similar disparities appear in perceptions of events, festivals, and sustainability.

Taken together, these findings point to a disconnect between Europe's image and the full range of experiences it offers. They also highlight a missed opportunity for individual destinations to position themselves more clearly around nature, outdoor activities, and cultural events – and, in doing so, to broaden Europe's appeal beyond its most familiar narratives.

69% of travellers are more likely to visit Europe when they learn that Europe has the world's most extensive **networks of national and regional parks.**

Key factors shaping Europe's appeal over other destinations

- ■ Never travelled abroad
- ■ Never been to Europe but travelled abroad
- ■ Visited Europe previously

Safety and security considerations
82% 84% 87%

Cultural or historical richness
70% 76% 88%

Local cuisine and gastronomy
68% 78% 86%

Ease of visa and border-crossing
73% 78% 80%

Quality of transportation and connectivity
69% 76% 82%

Variety of experiences in a single trip
68% 71% 82%

Affordability of activities and attractions
72% 73% 77%

Trust in institutions (e.g., law, order, regulations)
68% 70% 78%

Confidence that I'll be able to communicate easily (language barriers, signage, services)
69% 69% 73%

Natural parks and outdoors activities
58% 59% 74%

Sustainability and environmental friendliness
48% 51% 66%

Seeing something I've discovered through social media, film, or popular culture
47% 52% 65%

Events and festivals
45% 47% 62%

Personal or emotional connection to the destination (e.g. heritage, ancestry)
40% 42% 60%

Note: n=2,038, Multipick question, Q: When deciding whether to travel to Europe instead of another destination, how much do the following factors matter to you?
Source: Statista, Destination Europe Survey 2025

Europe, Searched Before It's Seen

With unprecedented access to online research tools, social media, and personalised recommendations, many travellers now pre-select the activities, neighbourhoods, and experiences they want long before they embark on a journey. Increasingly, travellers define the type of experience they are seeking first and only then choose the destination that best fits those preferences.

Europe is therefore increasingly "discovered from home," with visitors arriving already oriented towards specific places rather than an abstract European ideal. As a result, destination marketing that presents Europe as a single, undifferentiated whole is less aligned with modern travel behaviour. What resonates instead is the continent's diversity – and the ability to help travellers navigate that diversity in ways that feel tailored, relevant, and meaningful.

Tourism messaging about Europe must meet travellers where they conduct their research – predominantly online – whether through search engines, travel blogs, social media, or increasingly large language models, often referred to as generative AI. This shift is widely recognised across the European tourism industry. In both the 2022 and 2023 European Accommodation Barometer, social media, as a source of inspiration, was only surpassed by advice from friends and family.[9]

Leading sources of travel information

Advice from friends and/or family
45%

Social media
39%

Search engine results
35%

Travel booking website
35%

Travel guide websites/books/apps
29%

Google maps or Google street view
24%

TV shows or movies
21%

Traditional travel agencies or tour operators
17%

Newspaper or magazine articles
14%

Podcasts
10%

Note: n = 32,000 travellers from 32 countries
Source: Booking.com

9. Statista & Booking.com, European Accommodation Barometer 2023

From Volume to Value in Travel Choices

An increasingly important influence on travel choices is travellers' growing awareness of the impact their journeys have on the places they visit. This concern spans environmental considerations as well as concern for local communities and ecosystems. Recent travel trends reflect this shift.

The emergence of "coolcation"[10] for example, illustrates how travellers are responding to changing weather patterns while also seeking alternatives to traditional peak-season destinations. Choosing cooler locations can offer relief from extreme heat, but it also often aligns with a desire to travel outside the busiest periods and explore less familiar places.

This heightened awareness is part of a broader reassessment of how people travel. Survey findings show that many travellers want to reduce the footprint of their trips, whether by being more mindful of resource use, transport choices, or the way destinations manage waste and natural habitats. For the most impact conscious travellers, these considerations are becoming part of the decision-making process rather than an afterthought – shaping not only where they go, but how they experience a destination.

Most travellers want to leave a positive impression

73%
of travellers want their spending to go back into the local community

69%
of travellers want to leave the places they visit better than they arrived

54%
of locals say visitors often or always support local businesses

53%
of locals say visitors often or always respect local customs and traditions

Note: n=32,000 respondents from 34 countries
Sources: Booking.com, Travel and Sustainability Report 2025

10. Forbes, The coolcation trend is heating up an the numbers prove it

Policy in Action

Every destination faces a distinct set of opportunities and constraints, shaped by local geography, infrastructure, and social context. The following case studies – drawn from the *Destination Always*[11], a report by Economist Impact commissioned by Booking.com – illustrate how local authorities are approaching issues such as mobility, housing, and resource management, offering practical reference points rather than templates to be replicated.

Copenhagen
Waste management

The number of visitors to Copenhagen has grown by 50% in less than a decade. Amidst this phenomenal growth, Denmark had to contend with high per capita municipal waste levels and desperately needed to find a more sustainable way forward. The answer came in the form of the Circular Copenhagen initiative, which targeted a figure of 70% recycled waste by 2024. Innovative policy-making paired with a sharp focus on synergy and deployment of the latest technology is what made a difference. By incinerating trash and generating electricity from it, Copenhagen addressed two issues with one solution – it improved its energy security while tackling the waste management conundrum.

And this is just the tip of the iceberg. The city has declared its ambition to become "the world's most sustainable destination". Such strategies are both good business in an increasingly competitive global tourism landscape and the right thing to do.

Paris
Reducing carbon emissions and road traffic

In a short ten years, Paris succeeded in reducing car use by an impressive 40% and embraced sustainability through initiatives like the Street Code, promoting eco-friendly transportation. The city demonstrated its commitment to pedestrian safety by introducing car-free zones around schools and doubling down on bike lanes – a vast 1,120km network of which has now been created.

This extensive reshaping of urban transportation significantly reduced the carbon footprint and improved the quality of life for Parisians and visitors alike.

Vienna
Affordable housing

Vienna is one of the fastest growing cities in the EU and recorded 18.9 million overnight stays in 2024[12], most of which were international visitors. The influx of new residents and visitors has posed challenges, particularly in housing supply and affordability. In response, Vienna offered a policy master class in social housing – worthy of mayoral attention the world over. At present, approximately half of the city's residents live in municipal or subsidised housing units.

Vienna's city authorities set municipal rent levels and use limited-profit associations as a way to increase housing supply while keeping prices in check. The rents those entities can charge are cost-based, which leads to figures 30% below the market average.

11. Economist impact, Destination Always: Future-proofing destinations to capture the benefits of visitors without trade-offs
12. Vienna Tourist Board, Best Ever Year for Tourism Delivers Record Revenue

A Revised Model for European Tourism: Unity in Diversity

Europe has an opportunity to re-examine how its tourism model delivers value – both for local communities and for travellers whose expectations are evolving. As interest in experiences grows, there is scope to augment mass tourism with approaches that place greater emphasis on cultural depth, awareness of local impact, and regional distinctiveness.

Today, an estimated 95% of tourism activity is concentrated in less than 5% of the EU's landmass. This concentration creates visible pressure in some destinations, while leaving significant potential elsewhere under-explored. Public debate tends to focus on the former, but doing so risks overlooking the opportunity presented by the latter – particularly in regions with the capacity, ambition, and assets to welcome visitors.

By developing more targeted offerings – including nature-based tourism, cultural festivals, heritage experiences, and outdoor activities – Europe can encourage a broader distribution of visitor flows, open up new economic opportunities, and support local development. In doing so, it can reinforce its position in a fast-growing sector distinguished by hyper-local employment, income generation, and strong linkages to local supply chains.

Responding to this shift does not mean replacing one tourism model with another. It means expanding Europe's offerings in ways that reflect how travellers now choose destinations: as individuals seeking experiences that align with their interests and values. Iconic cities and landmarks will continue to attract many visitors, but growing numbers are also looking to discover less familiar places and more personal ways of experiencing Europe.

Unlocking Nature-Based and Regional Tourism

Nature-based tourism represents a significant opportunity for Europe. Compared with the United States – where national parks are widely recognised as destinations in their own right – Europe's extensive network of national and regional parks remains relatively under-explored by international visitors, despite its biodiversity, cultural landscapes, and proximity to major population centres and transport hubs.

Booking.com travel data from 2015 to 2024 shows that destinations located within five kilometres of a natural park have grown at a rate five to six times faster than the EU tourism sector overall. Nature-based experiences also rank among the ten most popular and fastest-growing trip highlights on Booking.com, based on verified traveller feedback. Together, these indicators point to strong and sustained demand for travel rooted in nature.

Realising this opportunity will depend less on new institutional structures and more on how effectively Europe's natural destinations are integrated into travel planning and discovery. While protected areas are widespread, many remain peripheral in international travel itineraries and search behaviour. Practical steps that improve how these destinations are surfaced – from clearer categorisation and storytelling to better connections with transport and nearby services – could help bring them into travellers' consideration sets without altering local governance or conservation frameworks.

National parks and protected areas in Europe
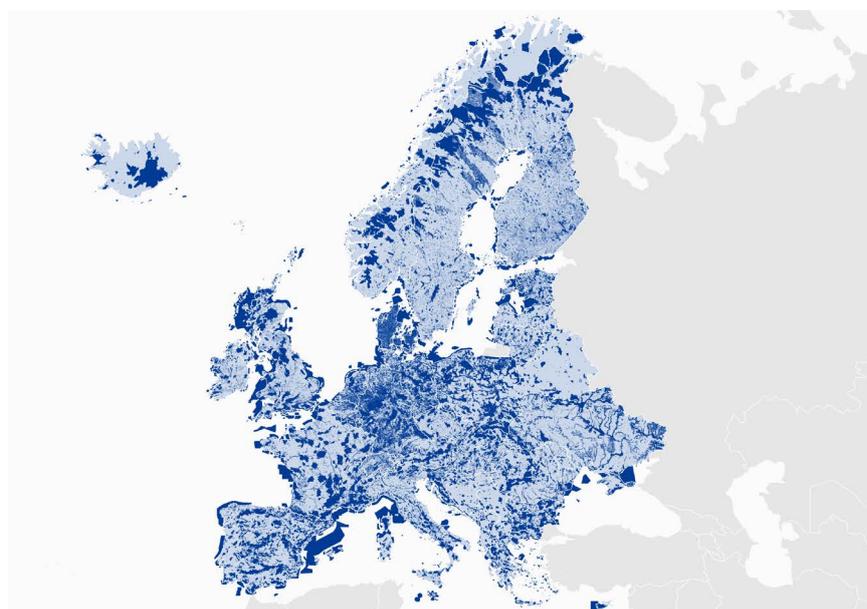
Source: World Database on Protected Areas (WDPA)

Aligning Tourism with Local Priorities

Interest in regional and nature-based travel also creates an opportunity to better align tourism with local development priorities. By encouraging travel beyond established urban centres and peak seasons, destinations can create new revenue streams for rural and secondary regions while supporting broader economic and social objectives.

European cities and regions vary widely in how tourism interacts with housing, infrastructure, and public services. In many cases, pressures attributed to tourism – particularly in housing markets – are more closely linked to long-standing supply constraints and planning frameworks. Policy responses that address these underlying challenges can ensure that tourism revenues contribute to improvements that benefit residents, such as public transport, public spaces, and community services.

At EU level, funding instruments and policy frameworks can support integrated destination strategies that align visitor activity with local capacity and ambition. Positioning tourism as a contributor to wider urban and regional development – rather than as a stand-alone sector – helps build community support and strengthens the long-term resilience of destinations.

Making Multimodal Travel Work

Seamless mobility is a core enabler of more balanced tourism patterns. For Europe, this depends on fair, responsible, and non-discriminatory access to real-time transport data across rail, air, and other modes. Today, fragmented data access limits the viability of integrated booking solutions and undermines the fluid experience travellers seek.

Public opinion data illustrates the challenge. Among EU citizens who rarely or never combine transport modes, 17% report being unable to find a suitable connection, while 14% do not know where to look for the information. Even among frequent users of multimodal transport, 35% describe the booking process as difficult or very difficult.

Recent enforcement actions – including the Bundeskartellamt ruling requiring Deutsche Bahn to provide non-discriminatory access to real-time data[13] – demonstrate how these barriers can be addressed. Building on this, the forthcoming Multimodal Digital Mobility Services (MDMS) regulation offers an opportunity to establish consistent data access principles across transport modes. To be effective, MDMS should ensure that integrated travel options can compete with single-mode journeys on both price and time. According to Flash Eurobarometer 551, the strongest incentives for choosing lower-carbon travel are cost parity (46%) and journey time that fits travellers' needs (29%).[14]

Therefore, the MDMS must go beyond merely enabling booking; it must ensure that real-time data allows digital service providers to price and present integrated journey options that are genuinely comparable to, or better than, alternatives in terms of total cost, duration, or carbon footprint. This focus on price and time-efficiency is the critical next step to successfully shifting consumer behaviour toward more sustainable forms of travel and bolstering Europe's long-term leadership on this topic.

Multimodal trip combinations in the EU

Bus + Train

42%

Train + Flight

36%

Flight + Bus

29%

Source: European Commission, Flash Eurobarometer FL551: Multimodal digital mobility service

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13. EU Travel Tech, Position paper: Multimodal Digital Mobility Services
14. European Commission, Flash Eurobarometer FL551: Multimodal digital mobility service

Enabling Trusted Digital Discovery

Digital discovery plays a growing role in shaping where travellers go. Search engines, social media, online travel platforms, and large language models increasingly enable bottom-up discovery by unique sets of criteria rather than top-down by region.

Evidence suggests the use of digital tools could play a role in widening distribution of tourism activity. An Oxford Economics study[15] shows that online travel platform users are significantly more likely to book accommodation in rural areas than the market average. While 16% of European accommodation sales overall are in rural locations, more than one-third of platform-based bookings are for countryside properties.

This reflects both the breadth of supply available and the way platform features shape traveller
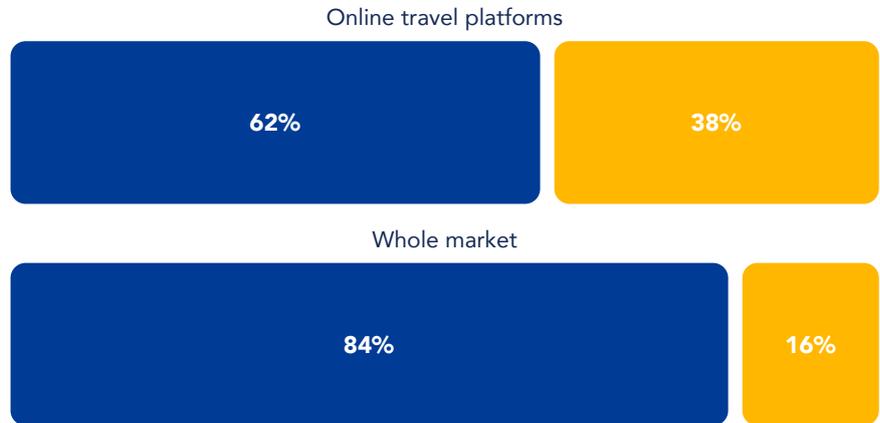
Rural properties are better represented on online travel platforms

■ Urban   ■ Rural

Online travel platforms

| 62% | 38% |

Whole market

| 84% | 16% |

Source: Oxford Economics, The economic impact of online travel agencies in Europe 2019–2021

decision-making. By aggregating accommodation and experiences across regions, and enabling easy comparison through pricing, availability, and verified reviews, platforms lower the barriers to considering less familiar destinations. As a result, accommodation and

experiences in rural or less-visited areas can gain visibility alongside those in established destinations.[16] Supporting trusted and transparent digital discovery therefore helps make Europe's diversity more legible to travellers and can contribute to more balanced patterns of visitation.

Looking Ahead

Europe's strength lies in the diversity of its destinations and the people who shape them. That diversity is not a weakness to be managed, but an asset to be used more deliberately.

As travel choices become more individual and more informed, Europe's competitiveness will depend on how well its destinations can be discovered, connected, and experienced – in ways that support

local communities as much as visitors. This is not about changing what Europe is, but about making its full range of places more visible and accessible.

If Europe gets this right, tourism can continue to be a source of opportunity: for regions beyond the usual routes, for local economies, and for travellers looking to experience Europe in all its richness.

15. Oxford Economics, The economic impact of online travel agencies in Europe 2019–2021
16. Hospitality Net, Platforms like Booking.com distribute tourism more equitably

Methodology

This issue brief is based on the findings of a survey conducted by Statista in collaboration with Booking.com. The online survey gathered responses from 2,038 respondents divided equally over four countries (USA, Japan, China and Brazil) and was conducted between 14.07.2025 and 16.07.2025.

Data from the following sources was used to supplement Barometer findings:
World Travel & Tourism Council (WTTC), McKinsey, Harvard Business Review, European Commission, Forbes, Economist Impact, Oxford Economics, Skift, Visit Latin America, Global news wire, French Tourism Ministry, Vienna Tourist Board, WDPA, EU Travel Tech and Hospitality Net.

Booking.com

statista