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Seizing Opportunities in Europe

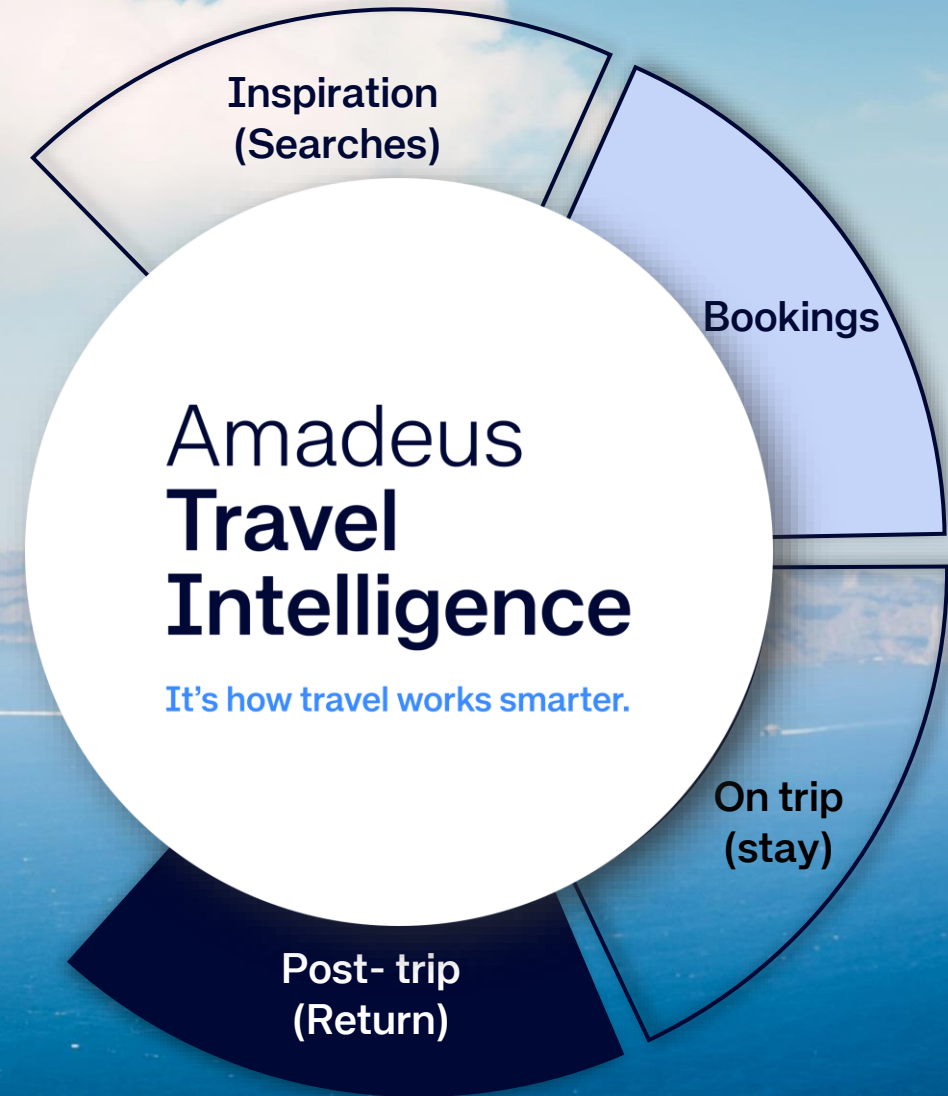
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Global Head of Hospitality Account Management

Travel Intelligence Ambassador

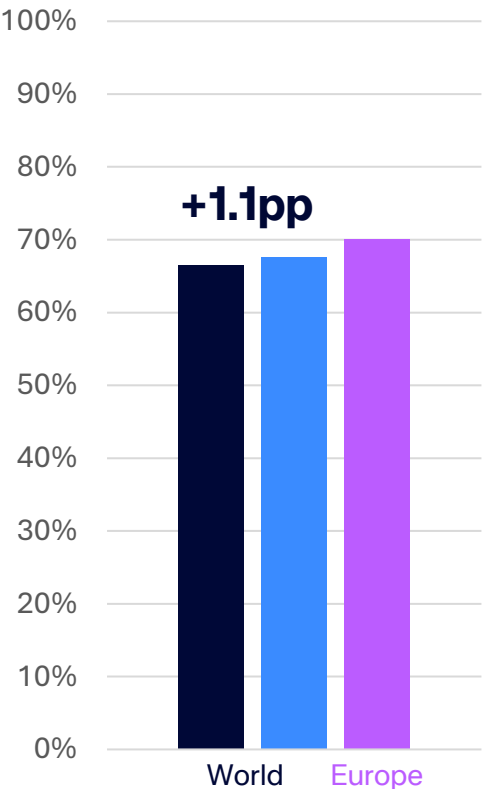
Understand the entire Traveler Journey

Data-driven insights that fuel the travel ecosystem



Hospitality market indicators

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



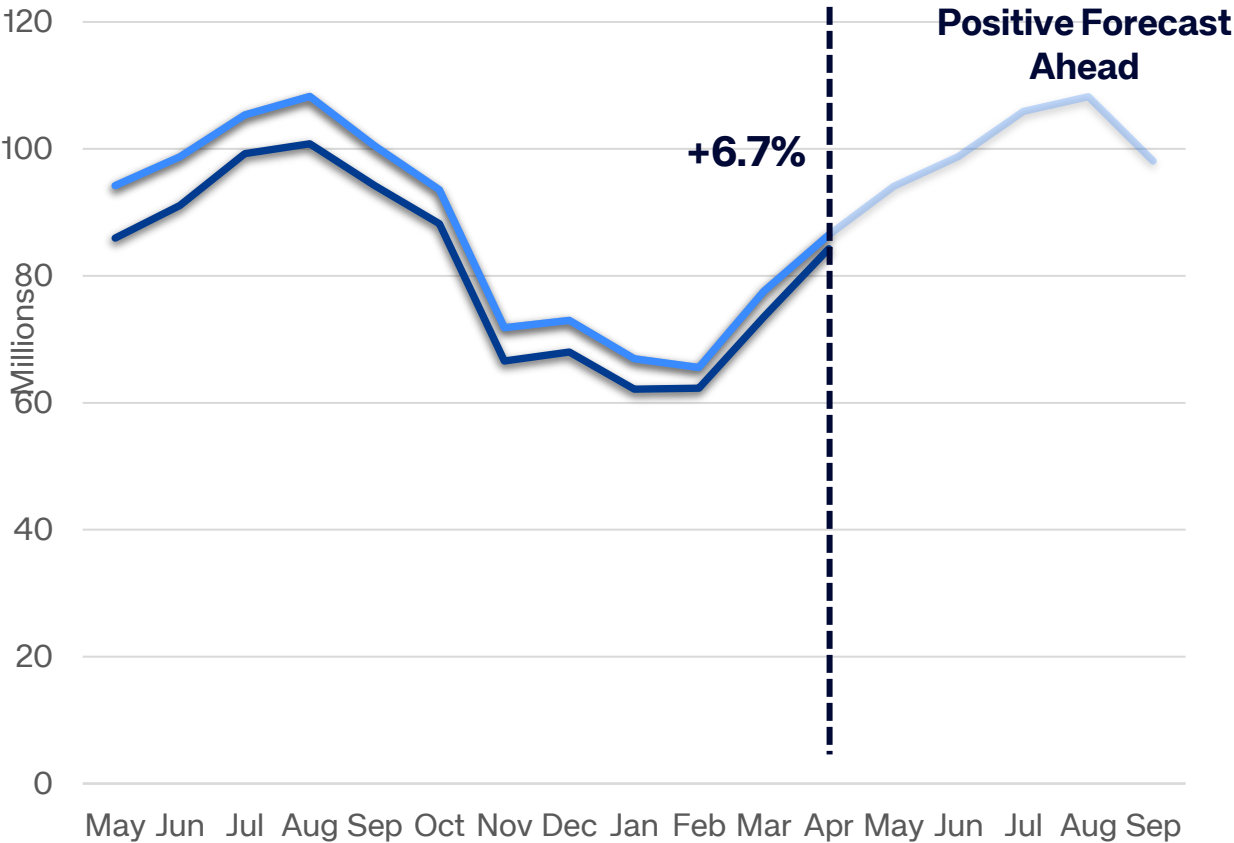
Average Daily Rate (“ADR”) evolution by year
(Average over the last 12 months)



May 2024-Apr 2025 May 2024-Apr 2025 May 2023-Apr 2024

Rising Air Traffic in Europe

Worldwide to Europe: Passenger traffic

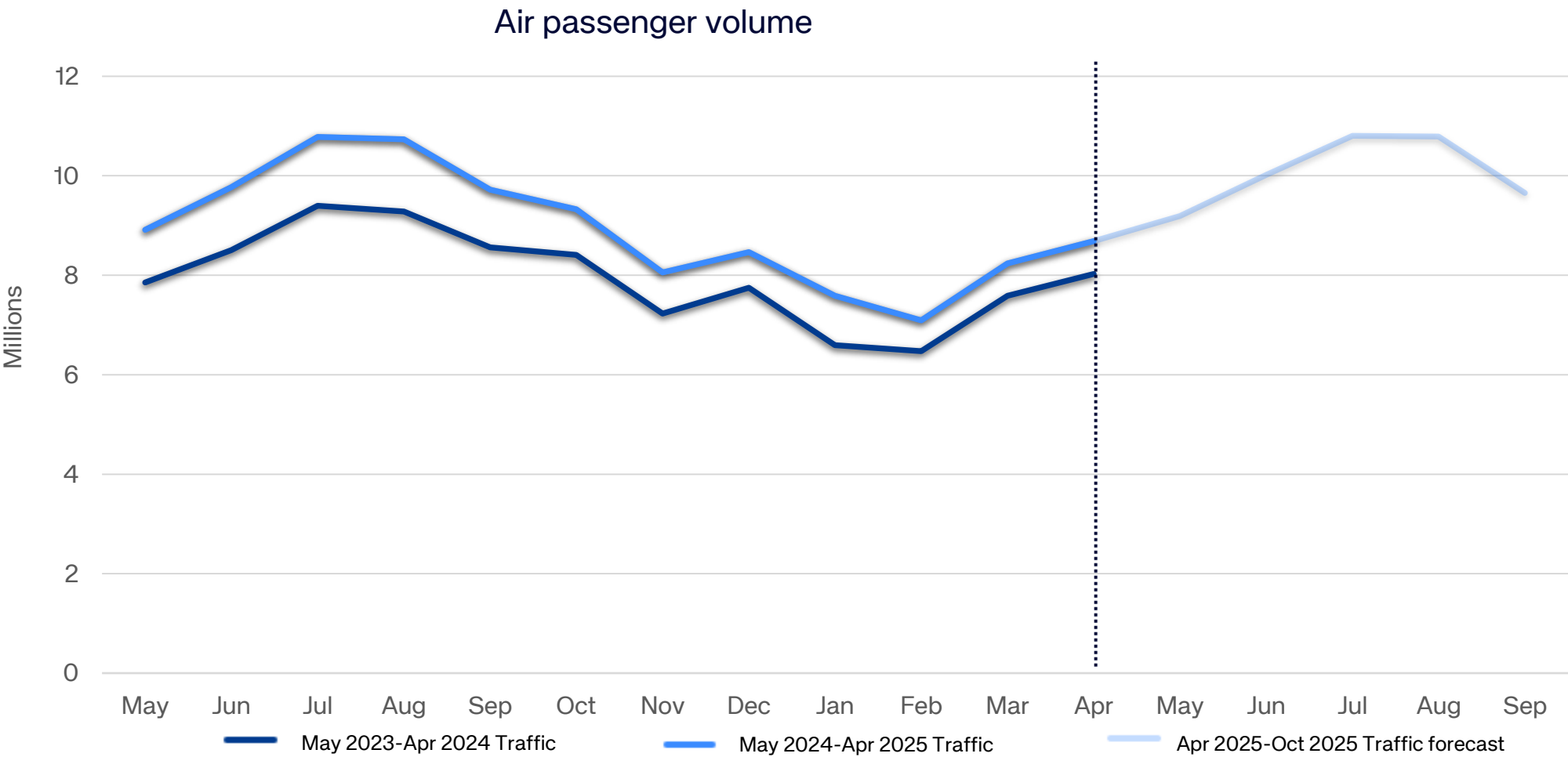


May 2023-Apr 2024 Traffic May 2024-Apr 2025 Traffic Apr 2025-Oct 2025 Traffic forecast

Central and Eastern Europe



Worldwide to Central and Eastern Europe



12.2% YOY
growth

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for Central/Eastern Eur.

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United Kingdom	2	1
Germany	3	2
China	14	4
Italy	5	5
United States	4	6
Spain	7	7
Türkiye	6	8
France	9	9
Kazakhstan	8	10

Top 10 origin markets travelling to Central/Eastern Eur.

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking	May.24-Apr.25 vs May.23-Apr.24
Kazakhstan	1	1	7%
United States	3	2	-2%
Germany	4	3	0%
Türkiye	2	4	-18%
Israel	6	5	11%
France	7	7	6%
Romania	8	8	0%
United Kingdom	9	9	3%
Spain	11	10	10%
Total	58.7%	57.2%	

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

Top 10 origin markets searching for Central and Eastern Europe with the highest growth (among the TOP 30)

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

Top 10 origin markets travelling to Central and Eastern Europe with the highest growth (among the TOP 30)

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

What type of visitors travel to Central and Eastern Europe?

1

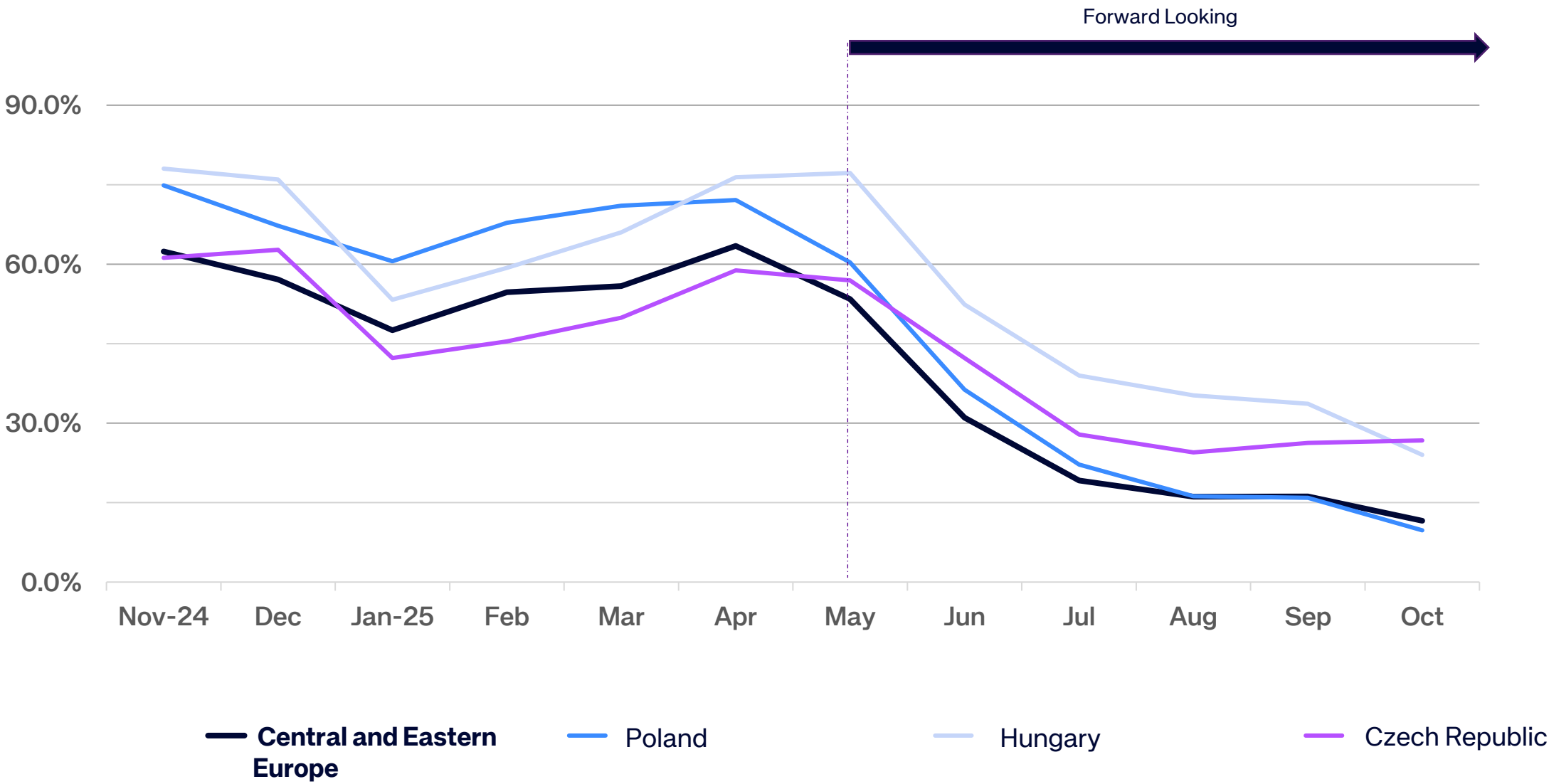
Most bookings (30%) were made within 1–7 days before departure, showing a clear preference for last-minute travel planning.

2

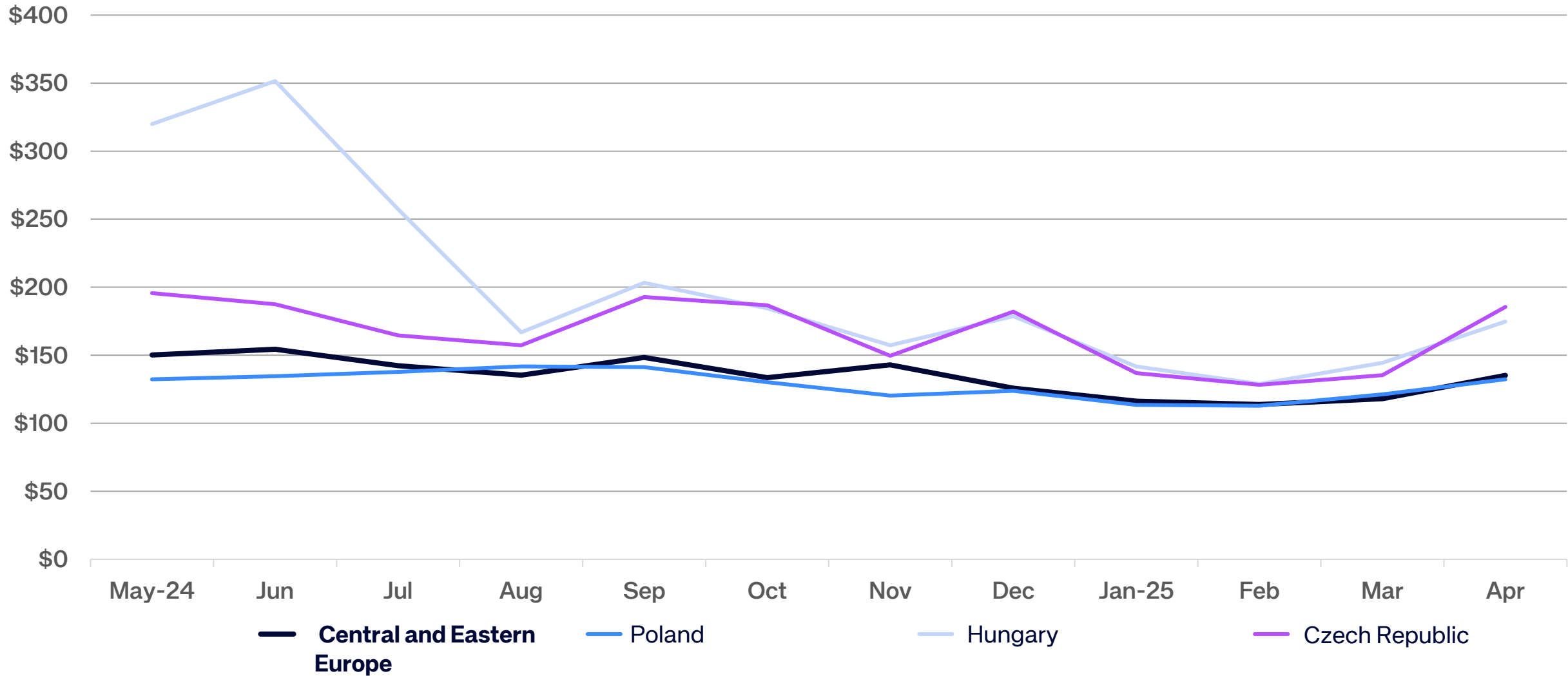
The 46–65 age group consistently holds the highest share of bookings across all regions, indicating it is the most travel-active demographic across Central/Eastern Europe.

Hotel Occupancy On-the-Books

For Central and Eastern Europe and its TOP 3 markets



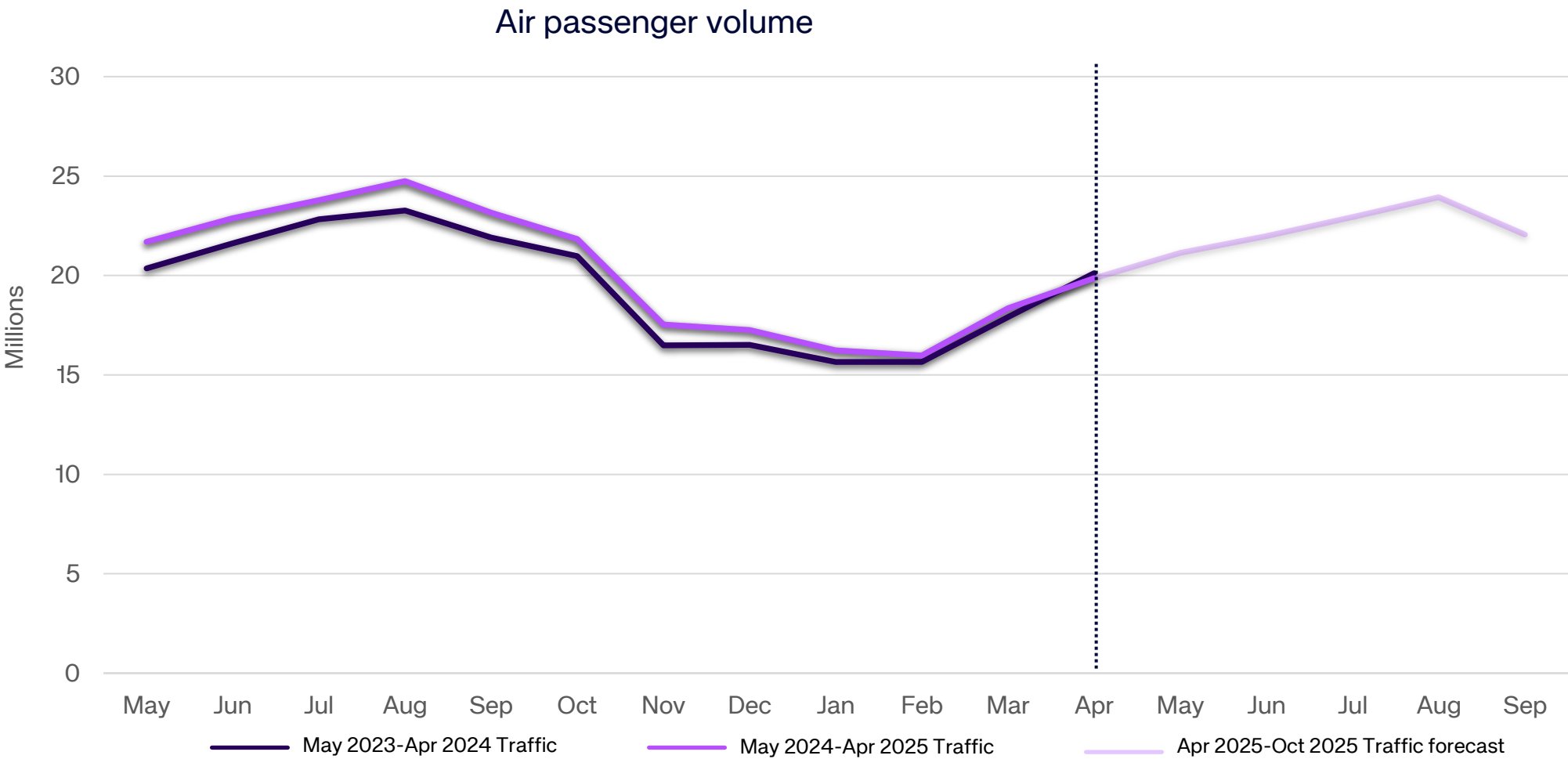
Average Daily Rate (ADR) in USD



Northern Europe



Worldwide to Northern Europe



4.3% YOY
growth

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for travel to Northern Europe

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

Top 10 origin markets travelling to Northern Europe

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
Norway	1	1
United States	2	2
United Kingdom	5	3
Sweden	3	4
Germany	6	5
India	4	6
Denmark	7	7
Spain	9	8
Australia	8	9
Italy	11	10
Total	56.6%	57.2%

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

Top 10 origin markets searching for travel to Northern Europe with the highest growth (among the TOP 30)

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

Top 10 origin markets travelling to Northern Europe with the highest growth (among the TOP 30)

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

What type of visitors travel to Northern Europe?

1

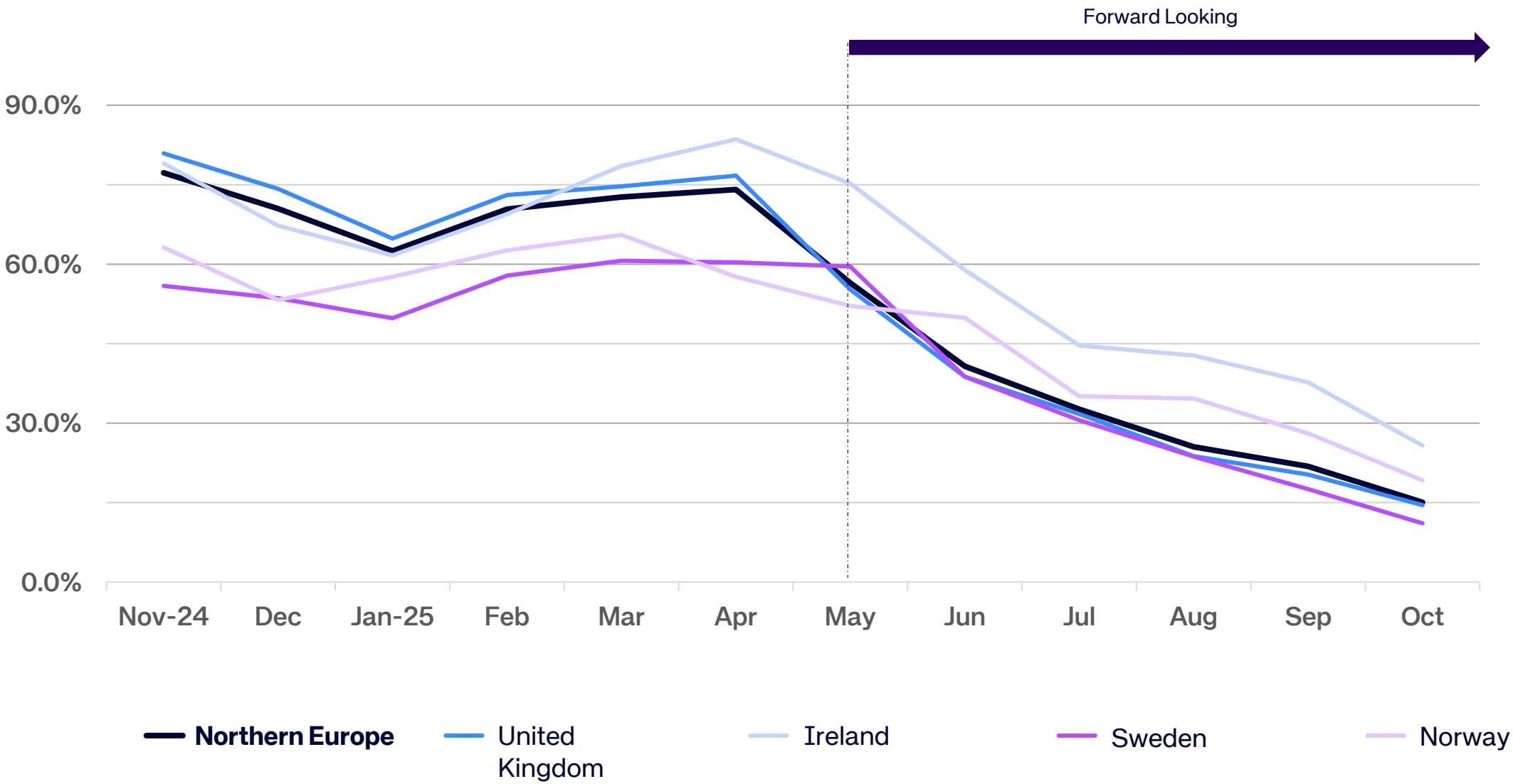
Most passengers (25%) booked their trips 61–180 days in advance, showing early planning

2

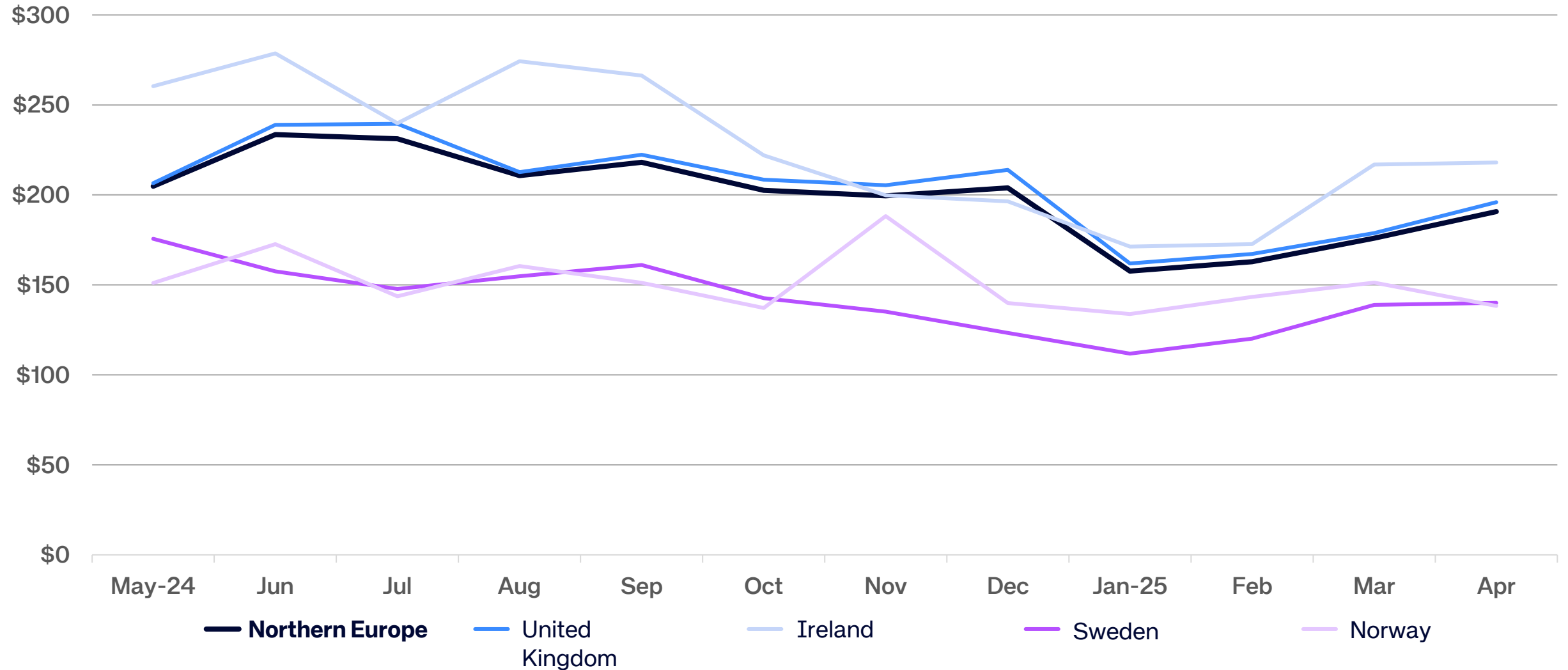
The 46–65 age group leads bookings across all destinations, making them the primary audience for Northern Europe travel

Hotel Occupancy On-the-Books

For Northern Europe and its TOP 4 markets



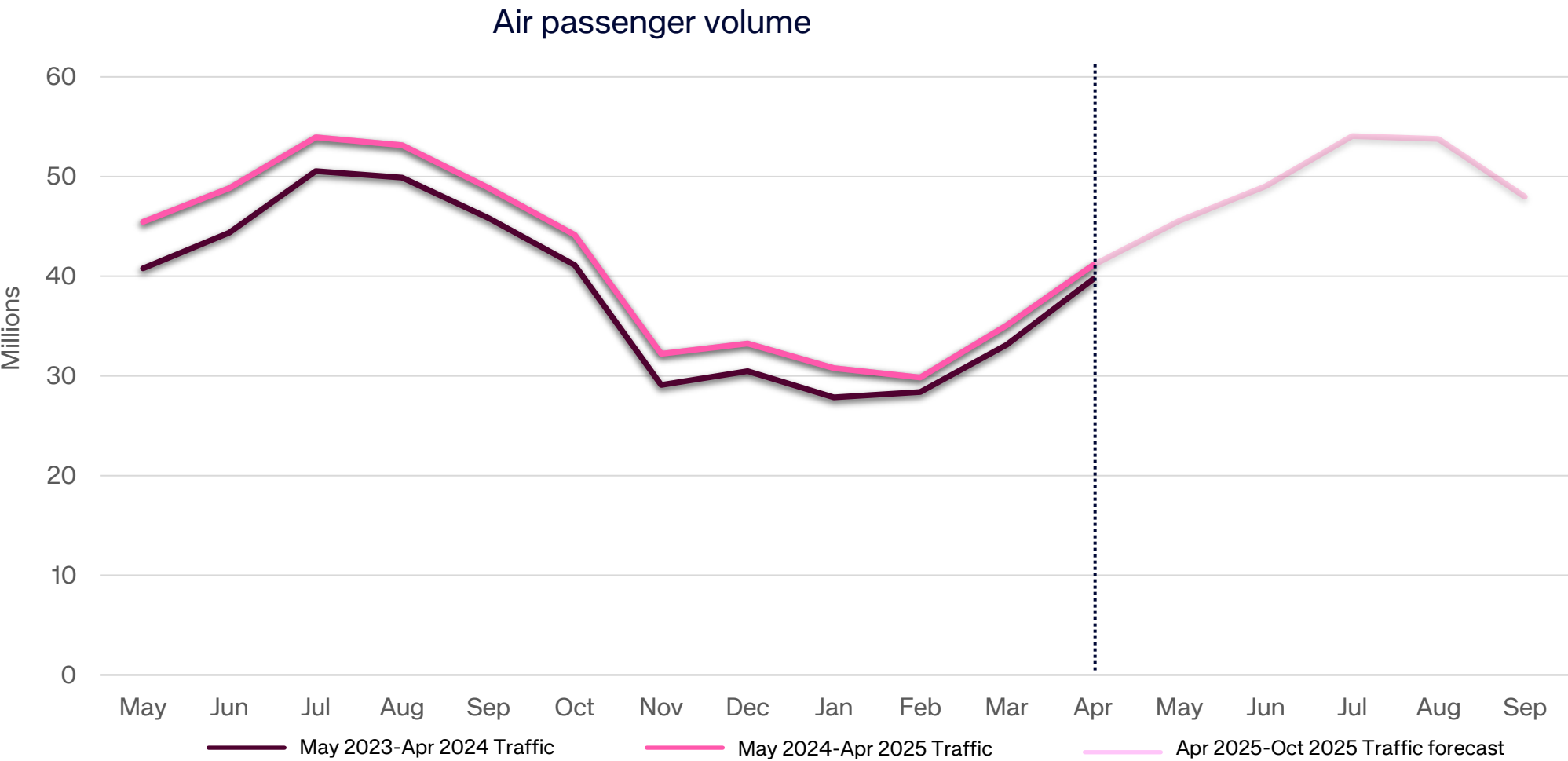
Average Daily Rate (ADR) in USD



Southern and Mediterranean Europe



Worldwide to Southern and Mediterranean Europe



7.7% YOY growth

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for travel to Southern/Medit. Eur.

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

Top 10 origin markets travelling to Southern/Medit. Eur.

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
Spain	1	1
United States	2	2
Italy	3	3
Germany	4	4
France	5	5
Portugal	6	6
United Kingdom	7	7
Brazil	8	8
Greece	11	9
Canada	10	10
Total	52.3%	52.4%

Are travellers from these markets to Southern/Medit. Eur. already on your radar ?

Top 10 origin markets searching for travel to Southern and Mediterranean Europe with the highest growth (among the TOP 30)

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

Top 10 origin markets travelling to Southern and Mediterranean Europe with the highest growth (among the TOP 30)

Origin markets	May.24-Apr.25 vs May.23-Apr.24 ranking	YoY Growth
Poland	1	12%
Korea (ROK)	2	11%
Denmark	3	11%
Egypt	4	8%
Sweden	5	6%
Portugal	6	3%
Italy	7	2%
India	8	2%
Norway	10	1%

What type of visitors travel to Southern and Mediterranean Europe?

1

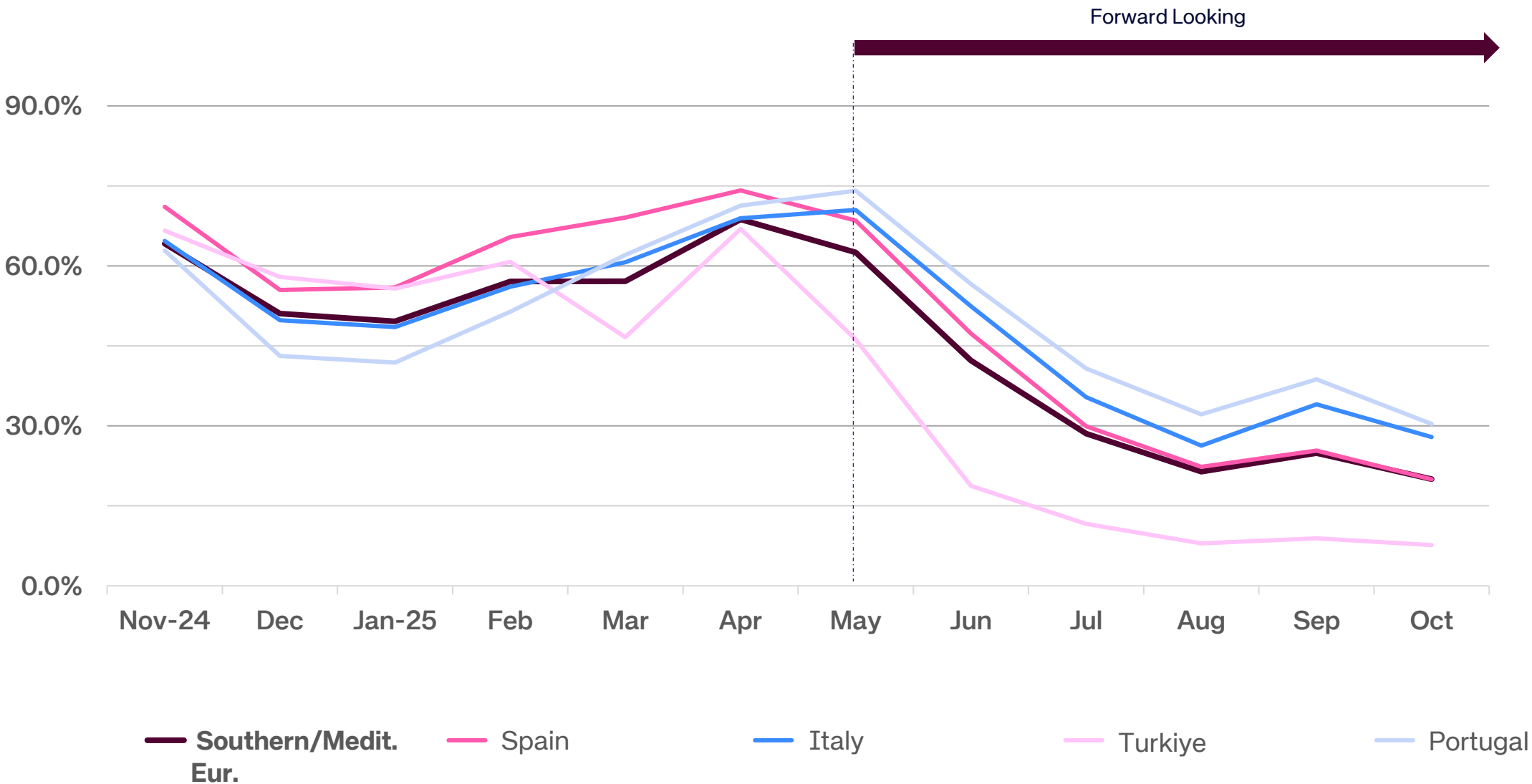
The highest share of passengers (25%) booked their trips between **61 and 180 days in advance**. This indicates a strong preference for early planning during this period

2

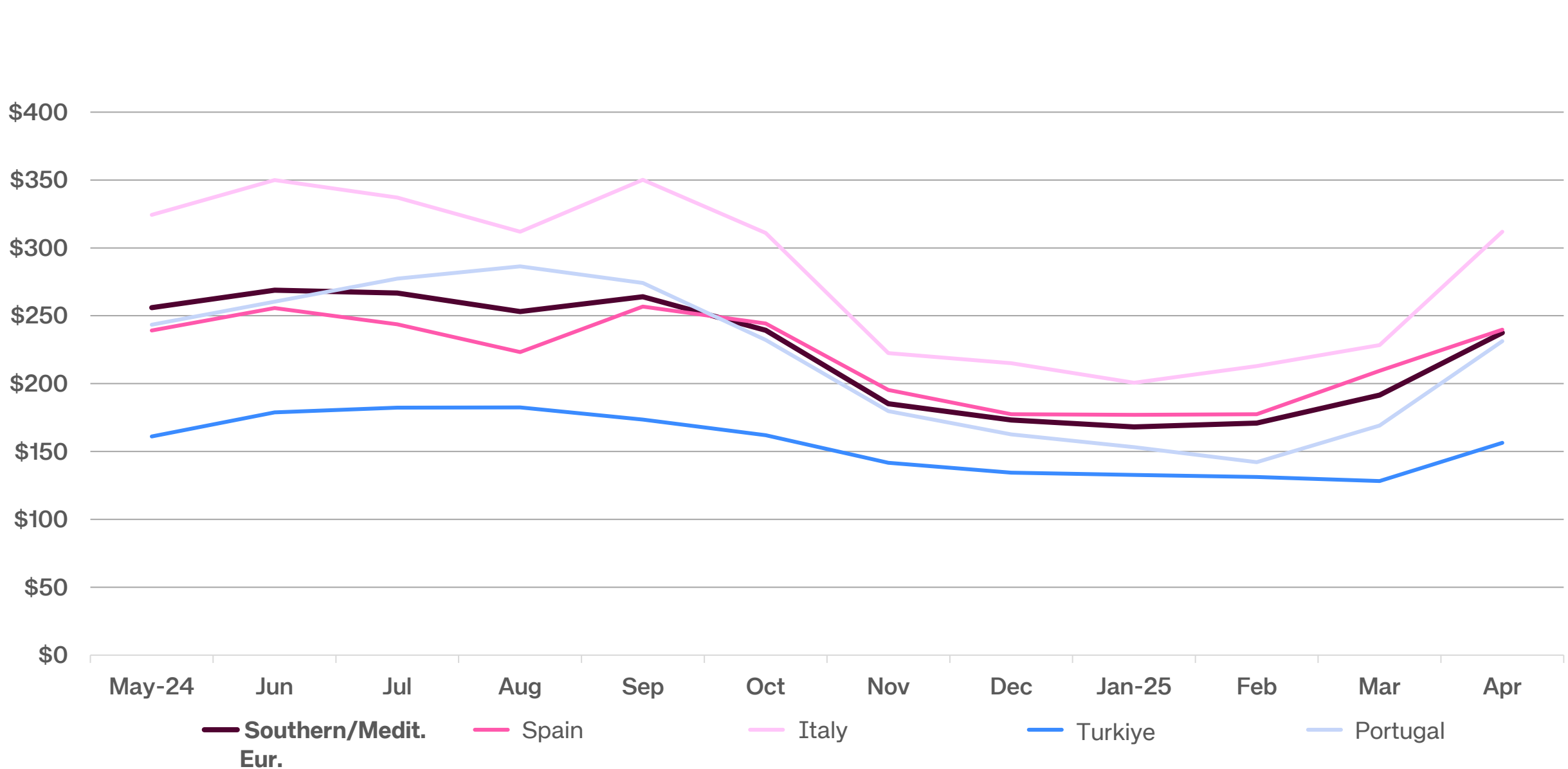
The 46–65 age group leads bookings across all Southern/Mediterranean destinations, especially Barcelona—highlighting mature travelers as the key market.

Hotel Occupancy On-the-Books

For Southern and Mediterranean Europe and its TOP 4 markets



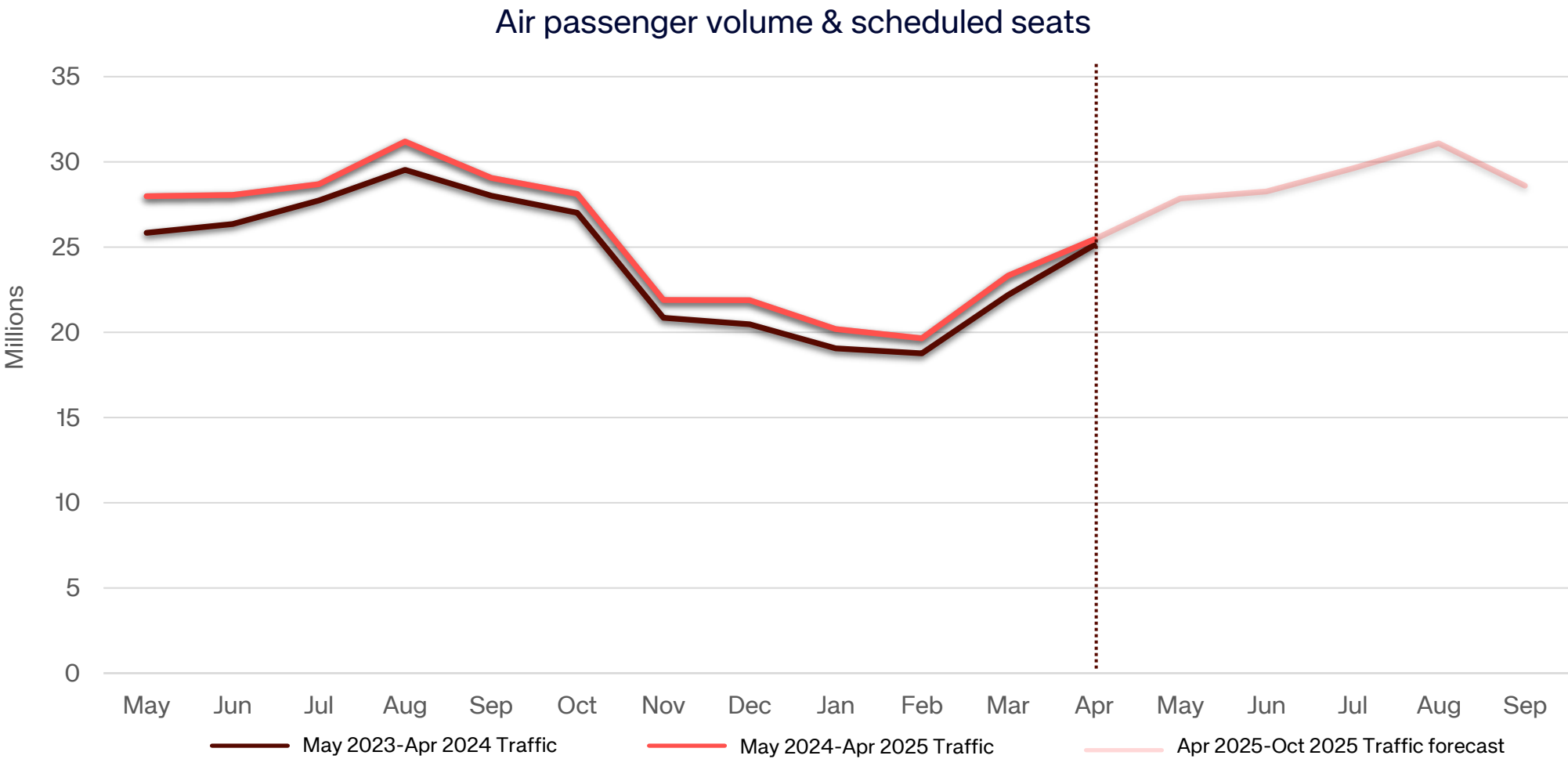
Average Daily Rate (ADR) in USD



Western Europe



Worldwide to Western Europe



5% YOY growth

Where do visitors come from? Reality vs. aspirations

Top 10 origin markets searching for travel to Western Europe

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

Top 10 origin markets travelling to Western Europe

Origin markets	May.23-Apr.24 ranking	May.24-Apr.25 ranking
United States	1	1
France	2	2
Germany	3	3
United Kingdom	4	4
Italy	5	5
Spain	6	6
India	7	7
Algeria	9	8
Portugal	10	9
Türkiye	8	10
Total	47.3%	46.1%

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

Top 10 origin markets searching to Western Europe with the highest growth (among the TOP 30)

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

Top 10 origin markets travelling to Western Europe with the highest growth (among the TOP 30)

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

What type of visitors travel to Western Europe?

1

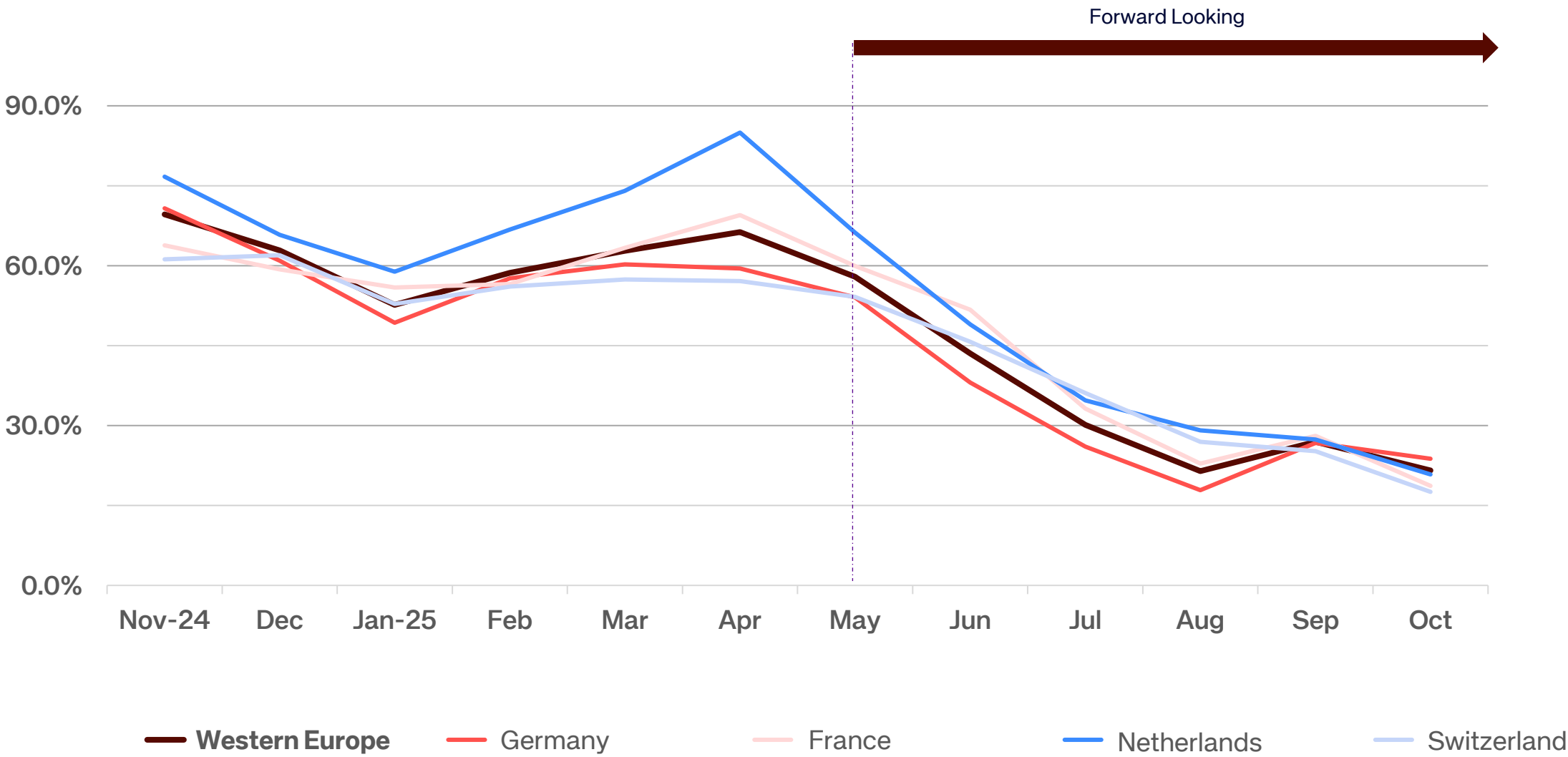
Advance bookings (2–6 months ahead) have grown year over year, showing a clear shift toward early travel planning.

2

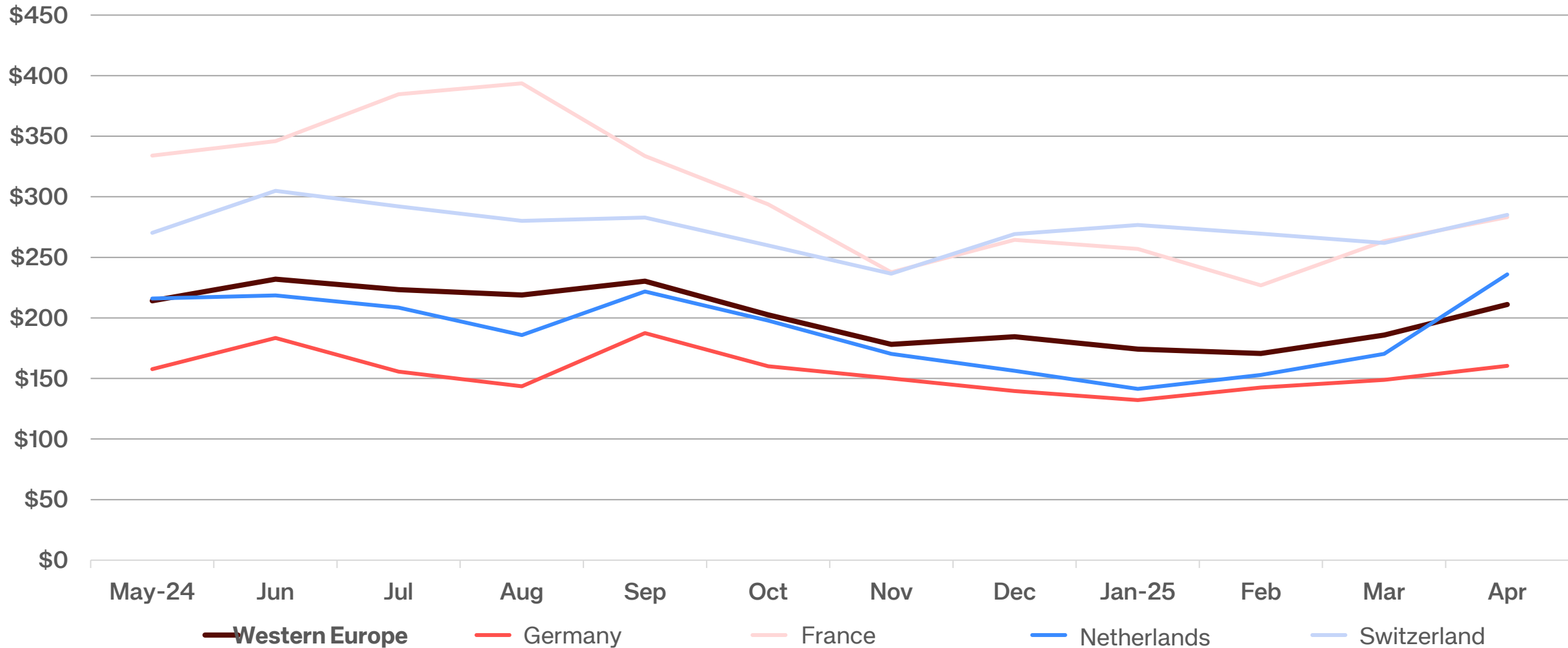
The 46–65 age group consistently leads bookings across Western Europe's top destinations.

Hotel Occupancy On-the-Books

For Western Europe and its TOP 4 markets



Average Daily Rate (ADR) in USD



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Request your own market landscape report to know:



2025 Travel Trends

Who is searching and visiting your destination

What was your Hotel occupancy and ADR (12 months)

Thank you

