What is the demand for outbound tourism on the European market?

Last updated:
17 March 2026

Global outbound tourism has recovered from the pandemic. There is continued growth in the first half of 2025. Germany and the UK are the largest European markets, and demand from all source markets is high. The highest growth in arrivals to South America, Africa and Asia was between January and June 2025. Traditional destinations are still popular among Europeans, including Türkiye, Egypt and Morocco. Emerging destinations that are becoming more popular include Vietnam, Sri Lanka, Jordan, Tunisia and Indonesia. Popular niches are adventure, community-based tourism, culture, food, nature and wellness.

Contents of this page

1. What makes Europe an interesting market to target?
2. Which European markets offer the most opportunities for tourism suppliers in developing countries?
3. Which tourism products from developing countries are most in demand from European markets?

1. What makes Europe an interesting market to target?

Europe is an interesting market to target because it is the largest outbound travel market. It makes up over half of all international outbound regional markets in 2024 (51.6%). Now that the sector has recovered, growth is expected to slow to a new normal.

There is increased demand for off-the-beaten-track destinations like Paraguay, Brazil and Mongolia. But the state of the global economy makes growth more difficult. It creates uncertainty among consumers. Making sustainability a part of all aspects of a tourism business is still a major requirement.

Current status of worldwide tourism

The tourism sector achieved made a full recovery in 2024 as international tourist arrivals reached 1.47 billion. This was slightly lower than arrivals in 2019 (1.68 billion), although the effect of this on each region varies. Growth has continued into the first half of 2025 (January to June) with overall growth of 5.1%. This is despite ongoing geopolitical crises and trade tensions that are having global impacts on many sectors.

Table 1: Status of International Tourism Arrivals 2022 to 2024

Region	2019 (millions)	2023 (millions)	2024 (millions)	% change 2019-2024	% change 2024 vs 2025 (Jan-June)

Region	2019 (millions)	2023 (millions)	2024 (millions)	% change 2019-2024	% change 2024 vs 2025 (Jan-June)
World	1,468.0	1,307.0	1,470.0	0.1%	5.1%
Europe	745.8	710.6	758.6	1.7%	3.9%
Asia and the Pacific	362.1	237.8	317.8	-12.2%	10.7%
North America	146.6	126.6	137.3	-6.3%	0.2%
Central America/Caribbean	37.0	39.7	44.3	19.7%	0.2%
South America	35.9	33.8	36.7	2.2%	13.9%
Africa	68.8	65.2	73.9	7.4%	12.4%
Middle East	71.6	93.4	101.2	41.3%	-4.2%

Source: UN Tourism, 2025

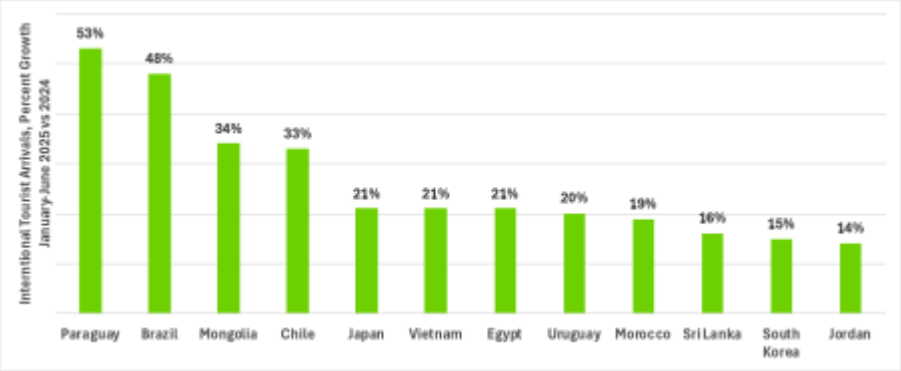
Analysis of tourism statistics by region shows the following:

- Middle East: the fastest-growing region in international arrivals during 2024, 41.3% higher than 2019 arrivals. But arrivals went down by 4.2% between January and June 2025. This was probably because of geopolitical tensions in the region.
- Central America/Caribbean: international tourism was 19.7% higher in 2024 than in 2019. This was the second-highest growing region, even though there was flat growth in the first half of 2025 (0.2%).
- Africa: tourism growth in 2024 was 7.4% above levels reached in 2019. Between January and June 2025, there was a 12.4% increase in international arrivals – the second-highest growing region. Both North Africa and sub-Saharan Africa had double-digit growth of 14% and 11%, respectively.
- South America: has recovered from the pandemic as international arrivals were 2.2% higher than those of 2019. In the first half of 2025, the region reported the highest growth among all regions in tourist arrivals (13.9%).
- Europe: international tourist arrivals in 2024 were 1.7% higher than in 2019. The region reported 3.9% growth between January and June 2025.
- North America: international tourist arrivals have not yet recovered to 2019 levels. There was still flat growth in the first 6 months of 2025 (0.2%). The region also reported flat growth in the first half of 2024 (0.2%).
- Asia and the Pacific: the region has not yet fully recovered from the pandemic. Tourist arrivals in 2024 were still 12.2% below 2019 figures. This was the slowest recovery worldwide because the region reopened to tourism later than other regions. But in the first half of 2025, international arrivals grew by 10.7%. They reached 92% of pre-pandemic figures. Intra-regionally, Northeast Asia had the highest growth (20.1%) compared to South Asia, which saw a 5.4% decline.

It is interesting to analyse international tourist arrivals by country to see how regional growth is being driven.

The chart below shows countries outside Europe where international tourist arrivals were strongest in the first half of 2025.

Figure 1: Countries outside Europe reporting the most growth in January- July 2025 compared to 2024



Source: UN Tourism, 2025

Other countries reporting notable growth in this period include Bahrain (13%) Tunisia and South Africa (12% each), Uzbekistan and Laos (11% each), Malaysia and Indonesia (9% each), and Mexico (7%).

Future projections and challenges

Industry experts like UN Tourism, the World Travel & Tourism Council (WTTC) and investment research organisations say that international arrivals will grow more slowly. The growth rate will be 3-5% from 2026 onwards, after a positive rebound following the pandemic during 2024 and early 2025. Growth will vary by region.

The International Air Transport Association (IATA) also expects growing revenues and increased passenger numbers in 2025. Passenger growth will probably be at 5.8%, a slower rate than in 2024. This is another sign that post-pandemic catch-up is now fading. Tourism will settle into a new normal.

But there are still global challenges to tourism growth. These are linked to the state of the global economy. Global growth was estimated at 3.0% in 2025 and 3.1% in 2026 according to the IMF. Uncertainties like high inflation, higher trade tariffs and geopolitics will keep having an impact on global and regional economies in the coming months. There is low economic growth in many European countries. High inflation affects spending on things like holidays.

Other challenges to tourism growth include current conflicts occurring around the world. The Russia-Ukraine war has now been going on for almost 4 years. Both countries' tourism sectors have been severely impacted. Russian airspace is still closed to most Western airlines. This makes flights more expensive and longer.

There is instability in the Middle East because of the conflict between Israel and Hamas. It is still causing security concerns in the region. International tourist arrivals to Israel continued to fall in 2024. But arrivals to Jordan went up in the first half of 2025.

There are also other geopolitical factors affecting tourism. Like the trade tensions between the US and China, tensions in the South China Sea and disruptions to trade in the Red Sea. They all have the power to disrupt tourism, raise costs and create uncertainty.

Tip:

Keep up to date on global, regional and national issues that might impact tourism in your destination. Make sure you understand these issues. This will help you confidently reassure your buyers when they are worried. Be sure to take suitable actions to deal with issues when necessary.

Keep your risk management policy up to date. It is important to be prepared for as many crises as you can imagine. Use the CBI study How to manage risks in tourism to help you.

Sustainability requirements

At a global level, doing business in a sustainable way to deal with the effects of climate change has never been more important. 107 countries have pledged to net-zero targets, including the European Union (27 countries) and the UK. There has been a lot of publicity around this issue and people throughout Europe are very aware of it.

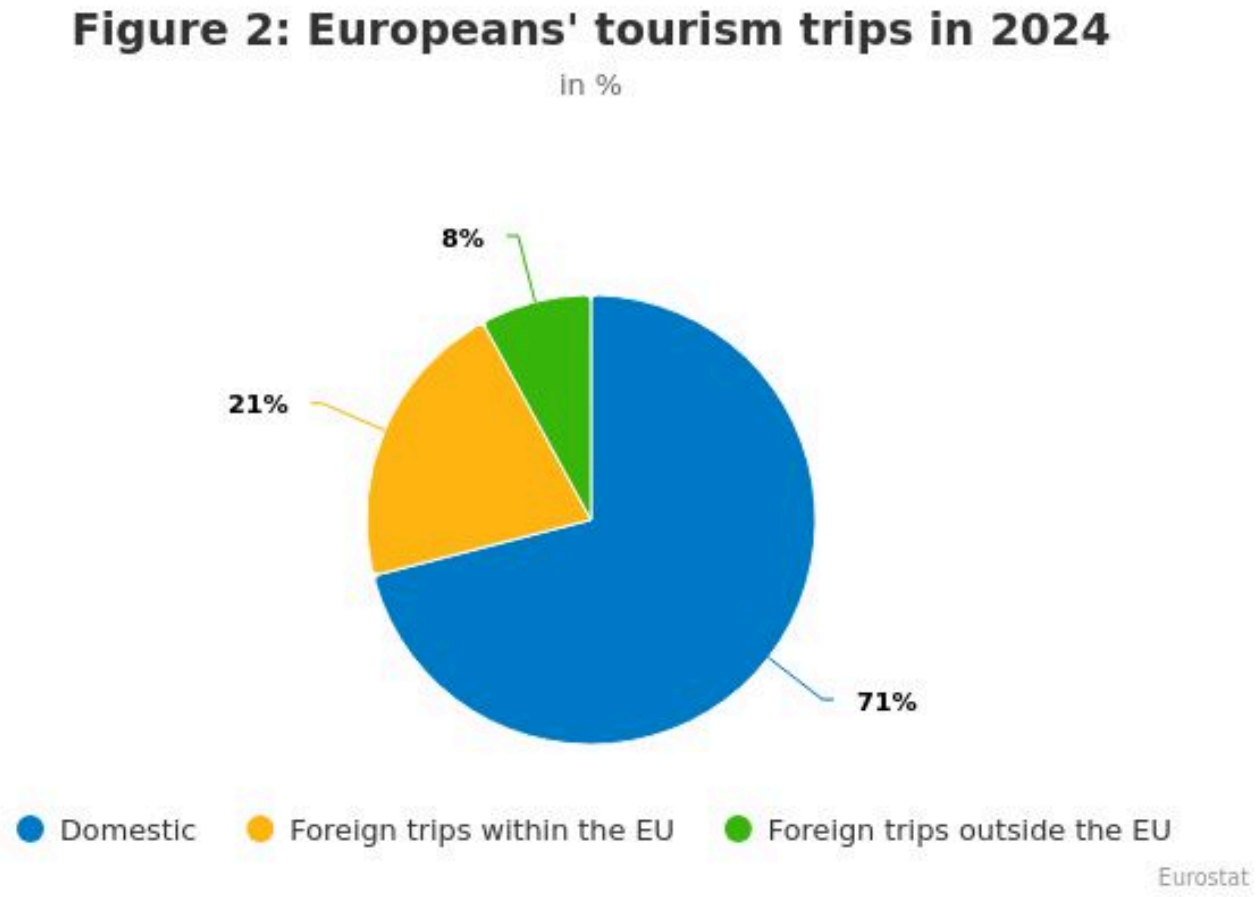
Regulations around sustainability in tourism are changing in Europe and requirements for businesses are becoming stricter. The EU Sustainability Regulations White Paper 2025 explains 3 new EU laws that will change how tourism businesses talk about and report sustainability. They are: the Corporate Sustainability Reporting Directive (CSRD), the Empowering Consumers for the Green Transition Directive (ECGTD) and the Green Claims Directive (GCD). Learn more about sustainability in tourism and how the sector is responding. The CBI study Which trends offer opportunities or pose threats on the European market? explains more.

To find out how to start taking sustainable actions in your business, read the CBI study How to be a sustainable tourism business.

Analysis of outbound tourism volumes from Europe

Europe makes up 51.7% of global outbound tourism (1,470 million international arrivals in 2024). In 2024, there were 758.6 million international arrivals from Europe. This number was up 1.7% compared to 2019. Every European region reported growth in outbound tourists.

Europeans made 1.19 billion trips in 2024, up 4.4% compared to 2023. Of these, 850 million were domestic tourism trips (71%) and 250 million were taken within the EU (21%). This is not surprising: most Europeans prefer travelling to short-haul destinations. There are many neighbouring countries that are easily accessible, are familiar to Europeans and have excellent tourism offers. The remaining 90 million trips (8%) were made outside the EU.



Source: CBI, 2025

Online sales channels are becoming more important in the German market. In 2024, over 54% of all holiday trips were booked online, compared to 51.3% in 2023. This is in line with current trends. At the same time, face-to-face bookings fell to 35%. This is another long-term downward trend.

German characteristics and travel motivations

Germans are especially motivated by nature. They enjoy beautiful scenery and wildlife, and going to the beach is a top pastime. They like to be active too, with walking/hiking and cycling as important activities. Culture is also important, and visiting cities, shopping and enjoying local food and wine are key appealing activities. Other motivations include:

- Relaxation and escape from routine (51.5%);

- Spending time with friends or family (50.3%);
- Being immersed in local cultures and people (45.2%).

Sustainability is important, and Germans like to minimise their impact on destinations when they travel. Research conducted by CBI in 2025 found that among German tourists:

- 59.7% felt that choosing local activities to benefit locals was either important or very important;
- 44.5% think that their environmental impact when they travel to a destination is either very important or important.

Other research conducted by the EU in 2021 found that:

- 54% would choose to consume locally sourced products while on holiday;
- 47% would be prepared to pay to protect the natural environment;
- 45% planned to reduce waste while on holiday;
- 43% would travel to less-visited destinations.

United Kingdom

The UK has a population of about 69.9 million. Its economy is one of the largest in Europe and worldwide. The International Monetary Fund (IMF) predicts GDP growth of around 1.3% for both 2025 and 2026. This is one of the highest percentages of all source markets. But inflation also remains the highest in the G7 (Group of Seven – Canada, France, Germany, Italy, Japan, the UK and the US).

British people enjoy a high standard of living. But growth in living standards is widely reported to be the slowest among major Western economies, and consumer confidence is weak.

UK residents were expected to travel abroad more in 2025, with 70% adults planning overseas holidays. But 75% of those planned to actively seek spending less. They choose shorter breaks, look for cheaper (or free) options, find lower-cost airlines, cheaper hotels etc.

British outbound travel market

The UK is the second-largest outbound tourism market in Europe. In 2024, British nationals took 91.4 million trips, representing 6.1% growth compared to 2023. But this is still lower than 2019 levels (93.1 million). Still, British tourists spent £77,396 billion in 2024, up 6.8% from 2023.

The future for outbound tourism is expected to be strong despite economic difficulties. The UK outbound travel market is estimated to be worth US$94.24 billion by 2025. It is projected to reach US$224.17 billion by 2035 – a CAGR of 8.6%. But ongoing economic uncertainties may affect the recovery of tourism. Affordability is now a big factor for British tourists when deciding where to go on holiday.

British outbound travellers spent 9.6 nights on trips overseas in 2024, down from 10.4 nights in 2023. Still, overall spending went up by 6.8% year-on-year, and by 0.7% per trip.

Table 3: British outbound travel – trips, nights, length of stay and spending, 2024

Year	Total trips	Total nights	Average length of stay	Spent, £ million	Average spent per trip, £
2019	93,086,000	904,905,000	9.7	62,325	669.54

Year	Total trips	Total nights	Average length of stay	Spent, £ million	Average spent per trip, £
2023	86,205,000	895,965,000	10.4	72,436	840.28
2024	91,435,000	880,833,000	9.6	77,396	846.46

Source: ONS, 2025

British people travel to a many different countries. They have the highest preference out of all main source markets for visiting developing destinations. Türkiye has kept on being the most popular long-haul destination for British tourists for many years, followed by India. India and many African countries like Kenya and Tanzania are traditionally popular destinations for UK nationals because of historical ties.

The table below shows especially good growth in 2024 to Egypt (209.2%), Morocco (30.6%) and Türkiye (27.4%). You can see that arrivals to the top-5 destinations are higher than they were in 2019. Other destinations that British people liked in 2024 include Japan, Tunisia, Jamaica, Brazil and Sri Lanka.

Table 4: Outbound arrivals of British nationals to developing countries, 2019-2024

Country	2019	2023	2024	% Change 2023-2024
Türkiye	2,288,000	3,204,000	4,082,000	27.4%
India	1,606,000	1,942,000	2,053,000	5.7%
United Arab Emirates	1,293,000	1,305,000	1,400,000	7.3%
Morocco	808,000	951,000	1,242,000	30.6%
Egypt	171,000	249,000	770,000	209.2%
Pakistan	768,000	641,000	625,000	-2.5%
Thailand	520,000	506,000	593,000	17.2%
Mexico	685,000	538,000	567,000	5.4%
Australia	550,000	418,000	565,000	35.2%
Hong Kong (China)	342,000	331,000	369,000	11.5%

Country	2019	2023	2024	% Change 2023-2024
South Africa	487,000	377,000	346,000	-8.2%
Nigeria	265,000	332,000	251,000	-24.4%

Source: ONS, 2025

British Travel Trade

There are more than 7,500 travel agencies and tour operators in the UK. The market size is estimated at £28.7 billion. Some of the leading tour operators are Jet2holidays, loveholidays and On the Beach Travel.

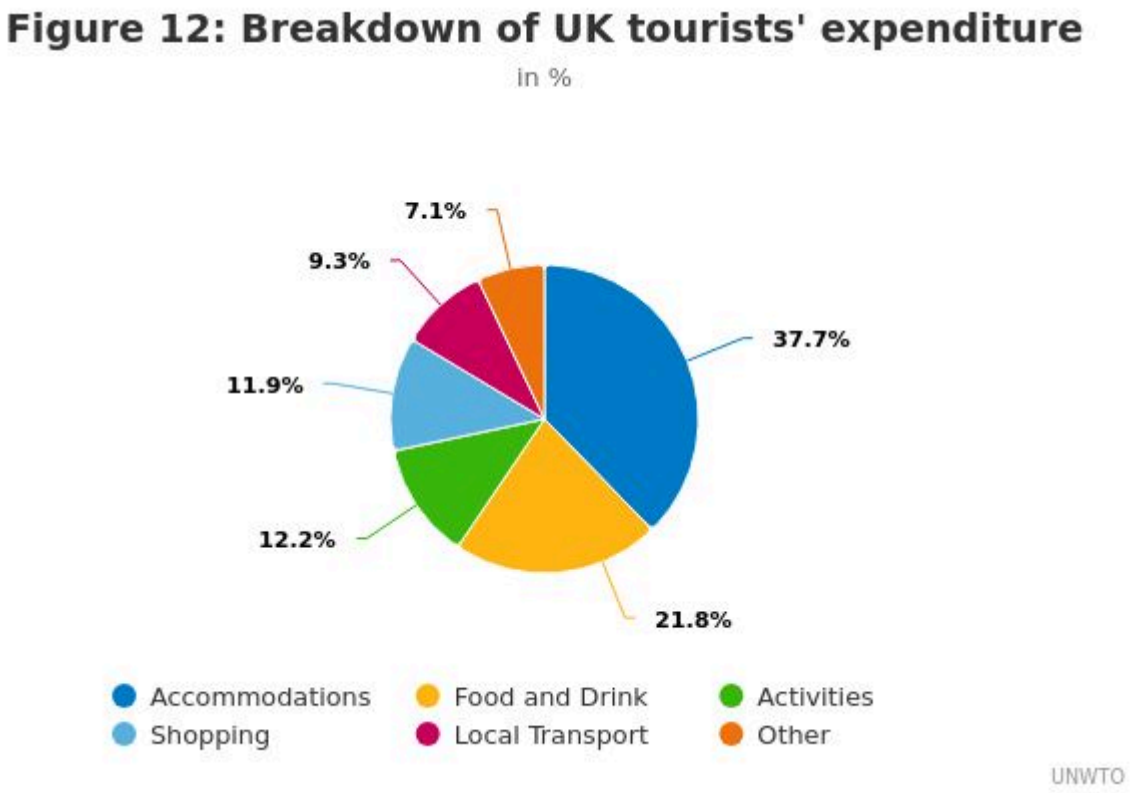
The market of tour operators in the UK that specialise in holidays to developing countries is large. Tour operators have global reach. This means their customer base extends further than the UK, to Europe and North America.

Many specialise in adventure travel or in regions, like Africa or Asia. Others specialise in activities like cycling trips or hiking. Some focus on luxury, budget or solo travel. Examples include Explore UK, Intrepid Travel, World Expeditions and Kuoni. Use the ABTA member search listing to find UK tour operators, or use internet listings like this one from TourRadar.

There are some interesting travel trade shows hosted in the UK. World Travel Market (WTM) is a global B2B (business to business) trade show that hosts more than 40,000 professionals from 184 countries yearly in November. It is a good way to network with other businesses. There are regional WTM shows in the Middle East, Latin America and Africa. LATA Expo and Experience Africa want to link buyers from the UK and Europe with suppliers from each continent.

British travel behaviour

By share, British tourists spent more than one-third of their budget to accommodations (37.7%). They spent one-fifth on food and drink (21.8%), less than all other source markets. They also spent less on activities than other source markets (12.2%).



Source: CBI, 2025

Online booking platforms are the preferred method of research among French travellers. 81.0% of respondents used them either frequently or sometimes. But word of mouth is almost as important to them (71.4%). This shows how important good reviews are. French people also like to use websites and guide books. For booking, online platforms are also the preferred method for services and experiences. But French travellers also like to book directly with providers or use retail agencies.

French characteristics and travel motivations

French tourists especially value the natural environment of a destination. Off-the-beaten-track destinations are becoming more popular. Cultural offerings are very important to French tourists, and so are sites of religious importance.

The French are known for their independent nature. Many French tourists like to make their own decisions and prefer to travel individually rather than as part of a group. Travelling solo is relatively popular among the French population. The French are more formal and demanding of respect. They often speak English less well than other nations. If you can speak to them in French it will be appreciated. Reassurance about health and safety precautions are important for French holiday choices and decision-making.

Other motivations that are important to French travellers include:

- Relaxation and escape from routine (45.5%);
- Being immersed in local cultures and people (44.6%);
- Spending time with friends and family (43.7%).

Like other European markets, sustainability is becoming a way of life. Choosing local activities while on holiday was the most popular sustainability action for French respondents. Almost two-thirds (63.5%) said it was either very important or important.

According to EU research in 2021, almost half of French people (48%) feel that sustainably certified accommodations are important. Individually, French tourists are more often deciding to travel less but stay longer. They might also make different travel choices – like taking the train instead of flying. They also have a strong preference to:

- Eat locally sourced products while on holiday (52%);
- Take steps to reduce waste while on holiday (45%);
- Know that more of their money directly benefits local communities (39%);
- Take holidays outside of the main tourist season (39%).

Italy

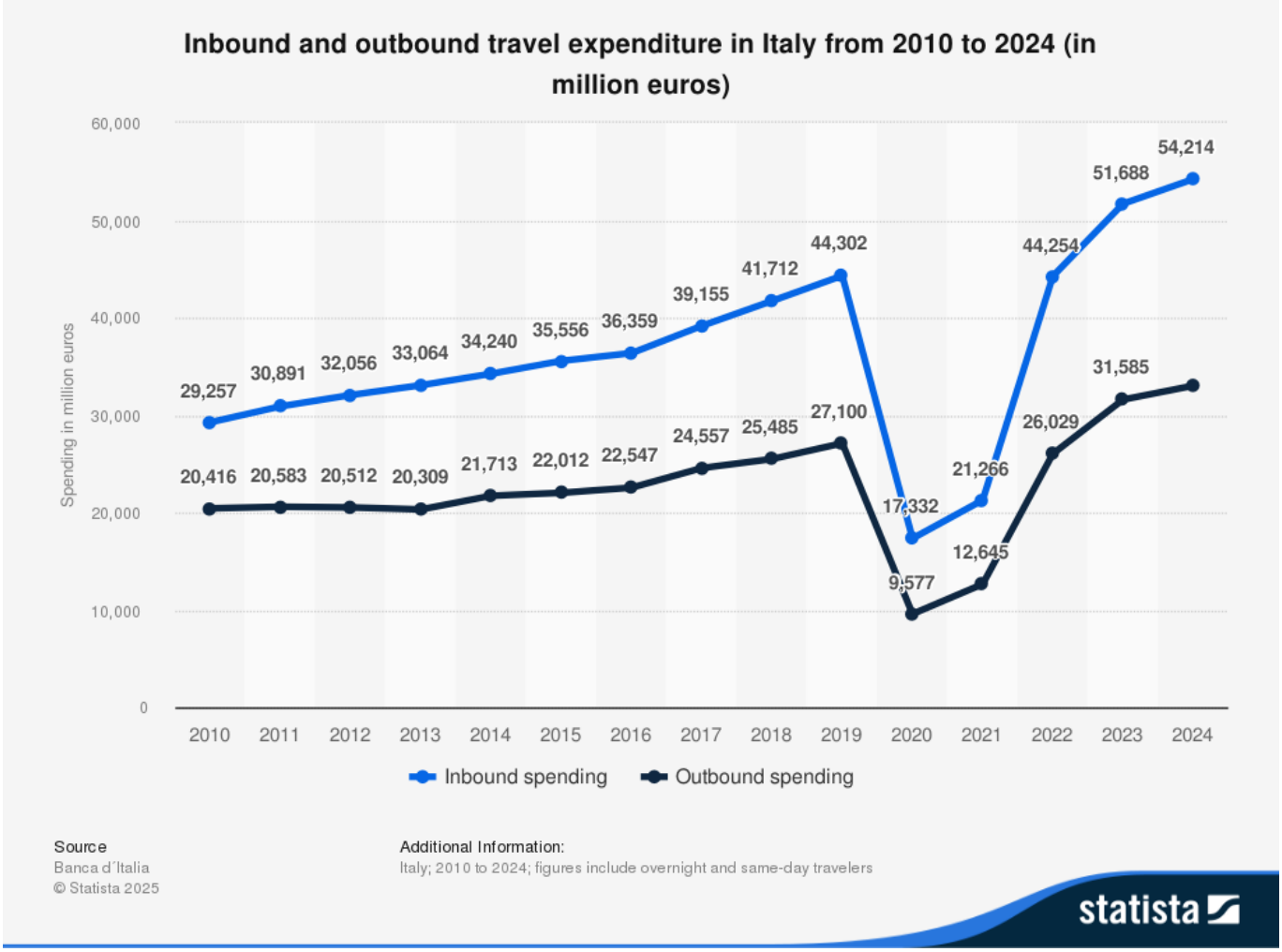
Italy has a population of around 59 million. Its economy is the eighth-largest in the world and the third-largest in the eurozone. Italy is an advanced country, although economic growth is weak and there are long-term challenges around high public debt and an older workforce. GDP is projected to grow by around 0.5% in 2025.

Italy's standard of living is high by global standards. But income growth is slow and there are regional gaps between the richer north and poorer south. Most Italians are well-educated and often speak English at a good level. But they appreciate information being made available in Italian.

Italian outbound travel market

Italian outbound travellers – overnight and day visitors – made 34.6 million outbound trips in 2024. They spent €33 billion, up 4.5% from 2023. Outbound expenditure has been rising since the end of the pandemic and is now 50.4% higher than spending reported in 2019.

Figure 14: Inbound and outbound travel expenditure from Italy, 2010-2024



Source: Banco d’Italia, Statista, 2025

Europe made up 87.1% of outbound travel in 2024. Outside of Europe, Asia was the most popular region for Italian outbound travellers in both 2023 and 2024, with 2024 arrivals increasing by 4.7%. In 2024, arrivals to Africa went up by more than one-quarter (26.2%) and spending in the continent by over 35.8%.

Italians stay the longest in the Caribbean and the Central and South American regions (13.9 nights), and the shortest in Africa (10.8). This is probably because it is relatively easy to reach the popular North African countries (Morocco, Egypt, Tunisia). These are the most popular destinations for Italian travellers.

Table 5: Outbound tourism from Italy, 2023-2024

Continent visited	Traveller numbers (millions)		% Change 2023-2024	Expenditure (€ millions)		% Change 2023-2024	Average length of stay	
	2023	2024		2023	2024		2023	2024
Caribbean, Central & South America	1.0	1.1	7.9%	1,566	1,601	2.3%	13.6	13.9
Asia	2.2	2.3	4.7%	3,661	4,275	16.8%	12.5	11.5
Oceania	0.7	0.7	-0.4%	1,408	1,527	8.4%	11.7	11.9
Africa	0.6	0.7	26.2%	527	715	35.8%	9.6	10.8

Source: Banco d'Italia, 2025

Other popular destinations for Italian tourists are Madagascar, Indonesia, Jordan, Vietnam and South Africa.

Italian travel trade

Italy's travel trade is large and mixed, with around 9,000-10,000 registered agencies and operators. Most are based in northern and central Italy, where incomes and travel demand are higher. The market is worth about €10 billion a year, and online sales have grown quickly since the pandemic. Many Italians still use travel agents for long-haul trips or complex holidays. But online booking and digital platforms are now a big part of the business.

OTAs are well-established in the market. Italian consumers especially like to use Booking.com, Expedia, Lastminute.com and eDreams. One of the largest tour operators in Italy is Alpitour. It has a turnover 6 times larger than the next biggest player, Gattinoni. Tour operators specialising in travel to developing destinations include The Labyrinth, Yana Viaggi and Viaggi Solidali. The Italian Federturismo Confindustria represents tourism businesses. You can find members in the listing on its website.

BIT Milan is the largest B2B travel trade show in Italy, with more than 2,000 exhibitors and 50,000 visitors. It is organised every year in February.

To find out more about the Italian travel trade and how to work with Italian tour operators, download Visit Britain's Italy Market Profile.

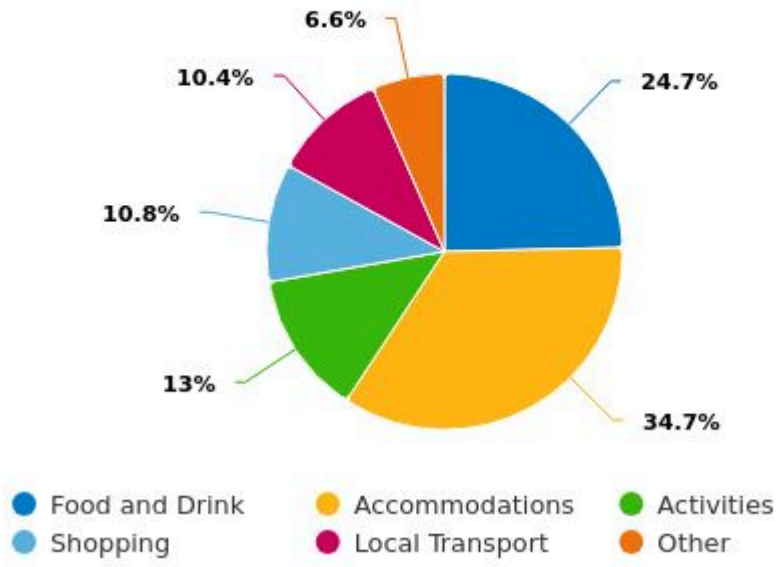
Italian travel behaviour

Like other markets, especially France, Italians spend the largest share of their travel budget on accommodation and food and drink (34.7% and 24.7% respectively). It is the top-spending market for food and drink. Around

13.0% of budgets is spent on activities. This is the highest among the source markets along with France and Germany.

Figure 15: Breakdown of Italian tourists' expenditure

in %



When planning a trip, the Dutch rely heavily on word of mouth from friends, colleagues and relatives (53%). They also use their own personal experiences to help shape their decisions (40%). As tech-savvy consumers, Dutch tourists also use websites that collect customer reviews and ratings, like Tripadvisor, to gather information.

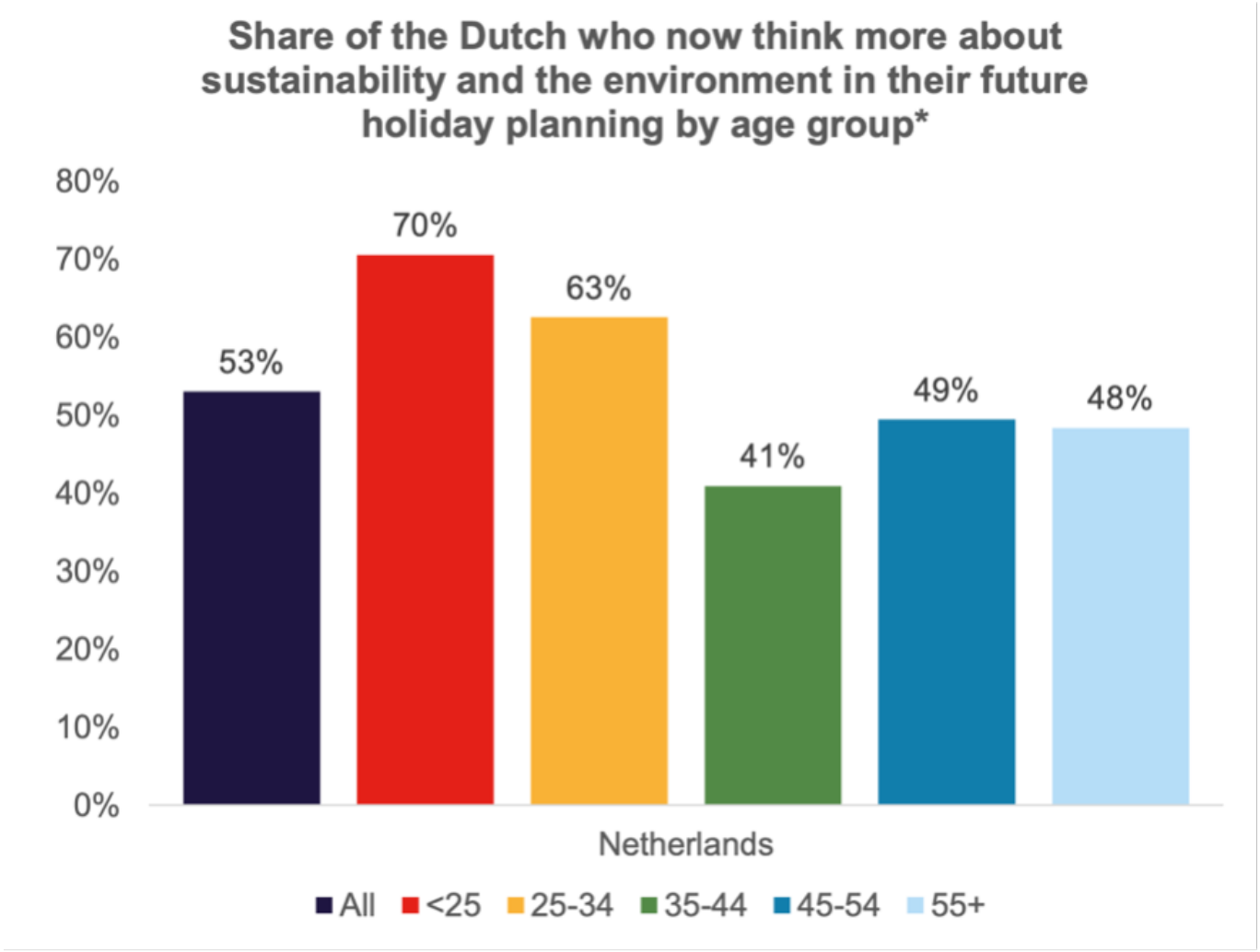
Dutch characteristics and travel motivations

Nature and culture are important to Dutch tourists. They are an adventurous market but look for destinations that are less crowded, with good sustainable credentials. Authentic experiences and value for money are also important to them. They value relaxation and the opportunity to get away from the stresses of everyday life.

Many Dutch people speak multiple languages at a good level, especially English. They are interested in other cultures and are careful with their money. They are direct and straightforward in their business dealings, and Dutch tourists behave in a similar way. Dutch tourists are well-organised when it comes to planning their holidays. They often research trips up to 6 months in advance. They are very comfortable using the internet to book their trips. Few Dutch tourists use traditional travel agents to book their trips these days.

The Dutch are very concerned about the environment and like to travel sustainably. The younger age groups show the strongest intention to change their behaviour when travelling. Actions include using other forms of transport rather than flying and minimising their use of plastic to help the environment. More Dutch people are becoming vegetarians (11% of the population), especially in the younger generation aged 18-24. Destinations with good vegetarian cuisines will be popular choices for conscious consumers.

Figure 17: Importance of sustainability to the Dutch



Source: Visit Britain, 2025

Dutch travellers also like to take in part in local activities that benefit local communities (51.3%). Other EU research found that Dutch tourists like to take practical action to travel sustainably. They aim to:

- Take holidays outside of the high tourist season (45%);
- Eat locally sourced products while on holiday (44%);
- Reduce waste while on holiday (44%);
- Travel to less-visited destinations (43%).

Spain

Spain has a large population (48.8 million) and a well-diversified and resilient economy. It has the fourth-largest economy in the EU. The economy is expected to experience GPD growth of 2.9% in 2025 and 2.3% in 2026. But, like other European consumers, Spanish tourists look for good-value experiences as the cost of living continues to decide how much they spend.

Spanish outbound travel market

Spanish tourists made 19.9 million outbound tourism trips in 2024, spending a total of US$29.3 billion. Spanish-speaking countries are popular outbound destinations for Spanish tourists: Mexico, Colombia, Costa Rica and Chile are among the most visited. But arrivals to these places are still below those achieved in 2019.

Arrivals to Morocco, Türkiye and Egypt all went up in recent years. This probably happened because they are the most convenient destinations. Other destinations that appeal to Spanish tourists are Vietnam, South Africa and Tunisia.

Spanish travel trade

The Spanish travel trade is made up of 'mayoristas' (tour operators), 'mayoristas-minoristas' (tour operators/retailers) and 'minoristas' (retail travel agents). 20% of them are in Madrid and there were around 9,700 businesses in 2020. Personal relationships are very important to Spanish business people, and take time to develop.

The top tour operators in Spain are Travelplan, Tourmundial and Catai Tours. You can find out more about the Spanish travel trade in this Trade Market Profile. CEAV is the Spanish federation of tour operators and travel agents. There is a useful members list on their website.

FITUR (Feria Internacional de Turismo) is the leading international tourism fair in Spain. It is organised every year in January, and aimed at B2B and B2C. The fair attracts lots of visitors (155,000) and exhibitors (9,500+) from over 150 different countries.

Spanish travel behaviour

According to Arival, Spanish travellers' average length of stay was 7.2 days. This number is lower than the other source markets. They also spent less than other markets – €1,928 per trip. Spanish tourists spend about one-third of their budget on accommodation (36.9%) and a quarter on food and drink (23.8%). This is broadly in line with other European nations.