

European Travel Trends **Summer 2025**

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For many, summer in Europe evokes sun-soaked beaches, seaside escapes, and Mediterranean flavours.

But that's only part of the story.

There are travellers turning to Europe's vibrant cities—especially during shoulder months—for their culture, creativity, and urban energy. From iconic museums and gourmet dining to summer festivals and sporting events, these cultural hubs continue to draw global attention.

In fact, nearly **1 in 3 Europeans** plan to take a **city break or cultural trip** within the continent over the next six months (source: **ETC**).

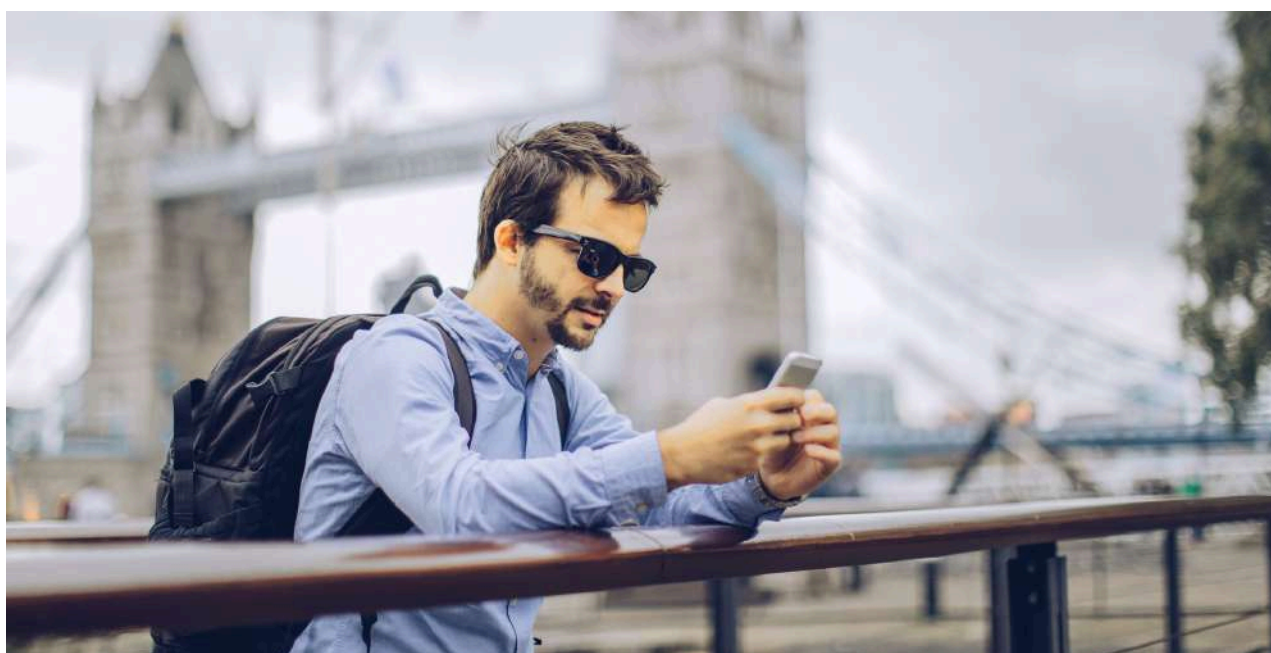


To explore the latest shifts in markets and behaviours, The Data Appeal Company—using its **D / AI Destinations** platform for destination management and marketing—has analysed key summer 2025 tourism trends in partnership with Mabrian. Both companies are part of the Almawave Group. The analysis focuses on seven of Europe's leading urban destinations: **Barcelona, Berlin, Copenhagen, Helsinki, London, Paris, and Rome.**

This report answers essential questions:

- What is the current **traveller sentiment** toward each city?
- What are the **main motivations** driving trips?
- How are **hotel rates and OTA prices** expected to evolve?
- Which **summer events** will generate the greatest interest and spending?

With short-term trends acting as early signals, this analysis offers **actionable insights for DMOs and travel professionals** looking to understand evolving traveler expectations, benchmark price trends vs. 2024, and plan sustainable growth strategies aligned with real-time market dynamics.



Traveller sentiment: How do visitors really feel?

Where travellers choose to go depends not only on flights and prices, but also on how a destination makes them feel—in short, on perception.

By analysing millions of online reviews, we've captured the emotional pulse of seven major European cities and translated it into one of our most powerful and reliable indicators: the **Sentiment Score**.

Between April 2024 and April 2025, we examined sentiment trends across key tourism sectors—**hospitality, short-term rentals (STR), attractions, and food & beverage**. While all cities show strong overall performance, the differences across categories and traveller origin reveal distinct strengths, weaknesses, and emerging patterns.

Sentiment Score overview

April 2024 – April 2025

City	Hotels	STR	Attractions	F&B	Overall
Barcelona	83.9	86.3	91.4	90	88.5
Rome	83.6	90.5	91.3	87.9	87.2
Paris	82.8	78.9	92.2	88.7	87
London	80.6	81.7	92.6	90	86.6
Helsinki	86.1	87	89.2	86.3	86.5
Berlin	81.9	82.9	89.8	86.5	84.9
Copenhagen	80.7	90.4	90.3	85.2	83

Source:



Needs improvement Great Excellent

Sentiment is measured using the Sentiment Score, rated on a scale of 0 to 100

Barcelona and Rome lead in overall traveller sentiment, driven by strong reviews in food, culture, and short-term rentals, while **Paris shows a gap between heritage appeal and hotel satisfaction**.

Copenhagen and Berlin receive lower marks, especially from domestic travellers—more specifically in the accommodation and F&B sectors—indicating local expectations may be rising faster than supply adaptation.

KEY INSIGHTS

What truly moves travellers: Attractions lead, hospitality lags

Attractions are clearly the strongest and most consistent sentiment driver: across all seven cities, the “Attractions” category consistently ranks among the highest-scoring sectors—often above 90.

This underlines that **cultural heritage, iconic landmarks, and local experiences** are not only central to the tourist offer—they’re the core emotional hook that generates satisfaction and memory-making.

On the contrary, **hospitality sentiment is positive, but slightly lower than other sectors**. Even high-performing cities like Rome (83.6) and Barcelona (83.9) show a gap between hotel sentiment and overall city sentiment. This could depend on detachment between high expectations and rising price sensitivity driven by growing economic pressure in many European countries.

Short-term rentals gain positive sentiment in the vast majority of cities. Even if the number of reviews for hotels strongly outpaces STR’s content, **they demonstrate offering good value, authenticity, and location convenience-especially** for longer stays and group/family travel.

Share of searches and air capacity: Where are travellers coming from?

Every summer, travel across Europe takes on a new shape—not just through flight paths, but through the places people long to visit. In this section, we look beyond bookings to explore **two of the clearest signals of travel intent from April to September 2025, provided by Mabrian**: flights share of searches, and the real-world seat capacity airlines make available.

The **Share of Searches**⁽¹⁾ Index is based on the total volume of spontaneous flight searches to a destination from a market compared to the total flight searches from this market to any destination in the world.

What people **search for shows where they want to go**. What airlines schedule shows where they **believe people will actually go**.

When both line up, that's when a real trend starts to take shape.



^[1] Mabrian's assessment of the Share of Searches Index performance applies a three-point scale for increase or decrease (minor, moderate, significant), based on the magnitude of percentage point variations and their relative impact on the overall index value. For a detailed explanation of the Share of Searches Index methodology, visit: <https://mabrian.com/blog/share-of-searches-index/>




KEY INSIGHTS

American travellers continue to show strong interest in European culture

The recent tariffs announced by the Trump administration on Europe, Canada, and China initially stirred diplomatic tensions and impacted travel sentiment towards the United States, particularly in February and March.

Fortunately, the reverse effect doesn't seem to have impacted American's interest in European cultural hotspots.

Long considered one of the most important inbound markets for the continent, **American travellers continue to show a strong bond with Europe's cultural capitals**. According to data from **Mabrian**, the **share of flight searches** from the U.S. has risen steadily—if not dramatically—across several key destinations.

-  **Paris, Rome, and Barcelona** each gained +0.04 percentage points in U.S. search share compared to the same period last year.
-  Interest in **Berlin (+0.02)** and **Copenhagen (+0.03)** has also increased, suggesting a broader appetite for destinations beyond the usual trio.
-  Travel intent to London shows a drop by -0.12 percentage points compared to summer 2024. Nevertheless, **U.S. inspirational demand to the UK's capital is the highest** when compared to the rest of European capitals studied.

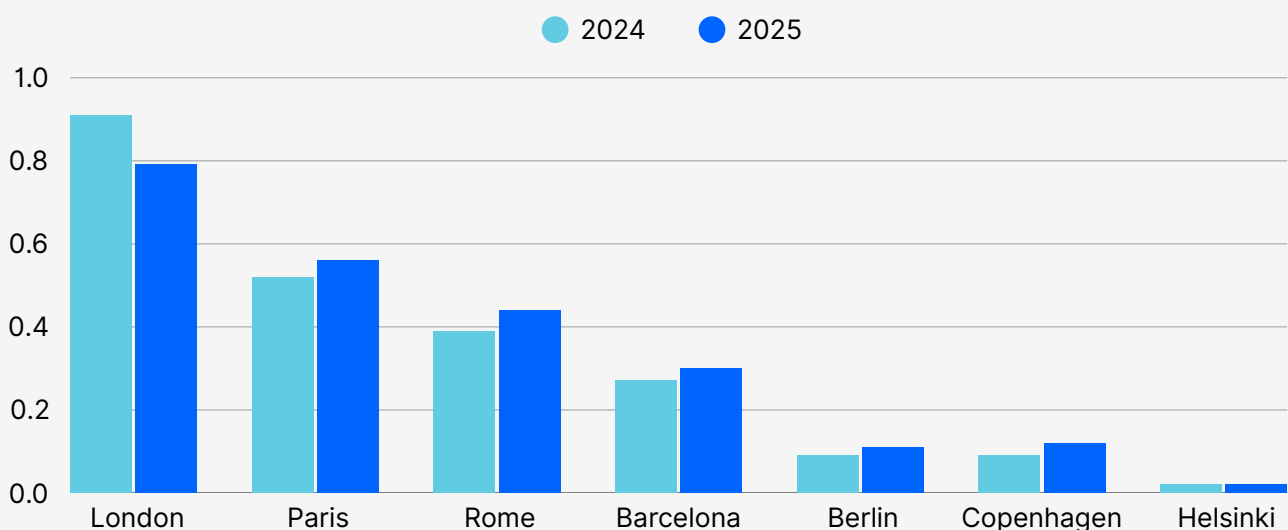
These figures reveal significant trends when considering the scale of the data, which measures travel demand across Europe by analysing millions of flight searches. **It does so by weighing the number of queries from a given market to specific destinations across the continent.**

The trend shows a renewed desire for cultural discovery, urban sophistication, and iconic experiences.

With **air capacity from the U.S. also increasing toward these destinations**—especially Barcelona (+14.4%), Rome (+4.3%), and Paris (+1.9%)—the potential for this intent to convert into real arrivals is more than plausible.

US Travel Intent to European Cities (Share of Searches Index)

Summer 2024 vs 2025



Source:



City recap:

Travel intent and air connectivity – Summer 2025



Paris

Paris confirms its status as one of Europe's most searched-for destinations, especially among long-haul travellers.

Share of searches is up from key markets like the U.S. (+0.04 pp) and France (+0.03 pp), while there is a strong decline from Spain (-0.06).

Air capacity shows signs of confidence from Germany (+6.18%) and Greece (+4.58%).

Rome

So far, the Jubilee doesn't seem to be having much of an impact on Italy's capital. Rome still stands out as a cultural heavyweight, but summer travellers seem to be leaning more toward classic holiday spots—especially along the coast. The city sees a **surge in flight search share from Canada (+0.09) and more modest increases from the U.S., Spain, and the UK**. In contrast, share of searches declines from Germany.

The UAE shows one of the largest increases in air capacity (+10.82%), only outpaced by Poland, which records an impressive +20.61% growth in available seats, signaling opportunities to increase travel intent and demand from both markets.

Search interest and air capacity from **Italy** are also declining, likely reflecting the economic pressures facing domestic travelers. In line with trends already visible in 2024, many Italians seem to be opting for **more affordable foreign destinations** during the summer months.





Barcelona

Barcelona shows one of the clearest success stories: sharp growth in air capacity (+5.7%), especially from the U.S. and Portugal, even if share of searches unveils a slight decline across all core markets, except from Portugal and US. Reflecting the domestic market customary habits in summer, leaning towards coastal destinations, the Spanish market travel intent sees a reduction (−0.09).

London

London summer appeal is stable. Share of searches data shows a decrease in interest from key markets like Spain (−0.11 pp), Italy (−0.07), and the U.S. (−0.12). At the same time, air capacity from key markets shows modest increase (+0.39%), with reductions from France, the UK, and Germany.



Copenhagen

Copenhagen is quietly positioning itself as **one of the best-connected Nordic capitals**, with a +6% increase in air capacity, particularly from Northern and Central European markets such as Sweden, Denmark, Spain, and Poland. As the data shows, **Nordic countries continue to act as strategic hubs for long-haul travel, especially toward Asia**. In this context, well-connected source markets like Spain often exhibit travel behaviour that extends beyond the core summer months. Transatlantic connectivity is also improving, with air capacity from the United States up by +10%. However, **travel intent remains relatively flat**, aside from a modest gain from the U.S. (+0.03 percentage points).

Berlin

Berlin sees a slight year-over-year **decline in air capacity (-1.1%)**, with the most notable drop from Italy (-27.3%), followed by Austria and the Netherlands—likely due to adjustments by low-cost carriers.

In fact, 57.1% of Berlin's scheduled air connectivity from April to September this year is set to be operated by low-cost carriers, which will reduce seat availability by -10.4% year over year—primarily driven by cuts from Ryanair and EasyJet.

Travel intent also dips slightly from key markets like the UK, Spain, and Italy (-0.02 to -0.03). That said, Berlin is **more of an urban escape than a summer holiday hotspot, with demand peaking in shoulder months like June and September.**



Helsinki

Helsinki records a **+4.7% increase in air capacity**, with notable growth from Japan (+25%) and the UK (+27.8%)—maybe a sign of growing airline confidence and the city's appeal as a cool-climate summer destination. For many Japanese travellers, Helsinki serves as a convenient **stopover on the way to other European cities**—and for Europeans traveling to Asia, the route often works in reverse. While overall travel intent remains stable, there are clear signs of diversification.

Travel drivers: What motivates tourists to choose a destination?

In a rapidly evolving travel landscape, understanding **why** people travel is just as critical as knowing **where** they go. This section explores the primary drivers influencing traveller decision-making—and how these motivations have shifted in comparison to the pre-pandemic period.

Beyond iconic monuments and picture-perfect landmarks, today's urban travellers are increasingly guided by **experiential and emotional factors**. Culture remains a pillar, but interest is expanding into new domains—**active pursuits, nature experiences**, and wellness.

Thanks to a detailed comparative analysis by **Mabrian**, we can now track these evolving preferences for five key cities: **Rome, London, Barcelona, Paris**, and **Berlin**.

** Available data on Copenhagen and Helsinki are not statistically relevant.*



KEY INSIGHTS

Culture remains the cornerstone—but outdoor and active experiences are on the rise

Culture is still the top motivator across all cities

Unsurprisingly, **culture continues to be the primary driver** for city travel in Europe. More notably, in 2024 it grew compared to 2019 levels—indicating a deepening appreciation for cultural capital in the post-pandemic era.

Rome leads with **51%** of travellers citing culture as their main reason for visiting (+**2.6 pp** vs. 2019)

Berlin follows closely with **48.2%**, up **+2.9 pp**

Paris holds steady at a high level: **49.5%**, with a slight increase from 2019

Gastronomy loses ground to active and outdoor experiences

In most of the cities analysed, **gastronomy remains the second most common travel motivation**, yet we observed a declining trend versus 2019.

Berlin is the only exception, where culinary interest shows a slight uptick, **food tours and tastings experiences are losing appeal**, with the sharpest drop recorded in **London (-4 percentage points)**.

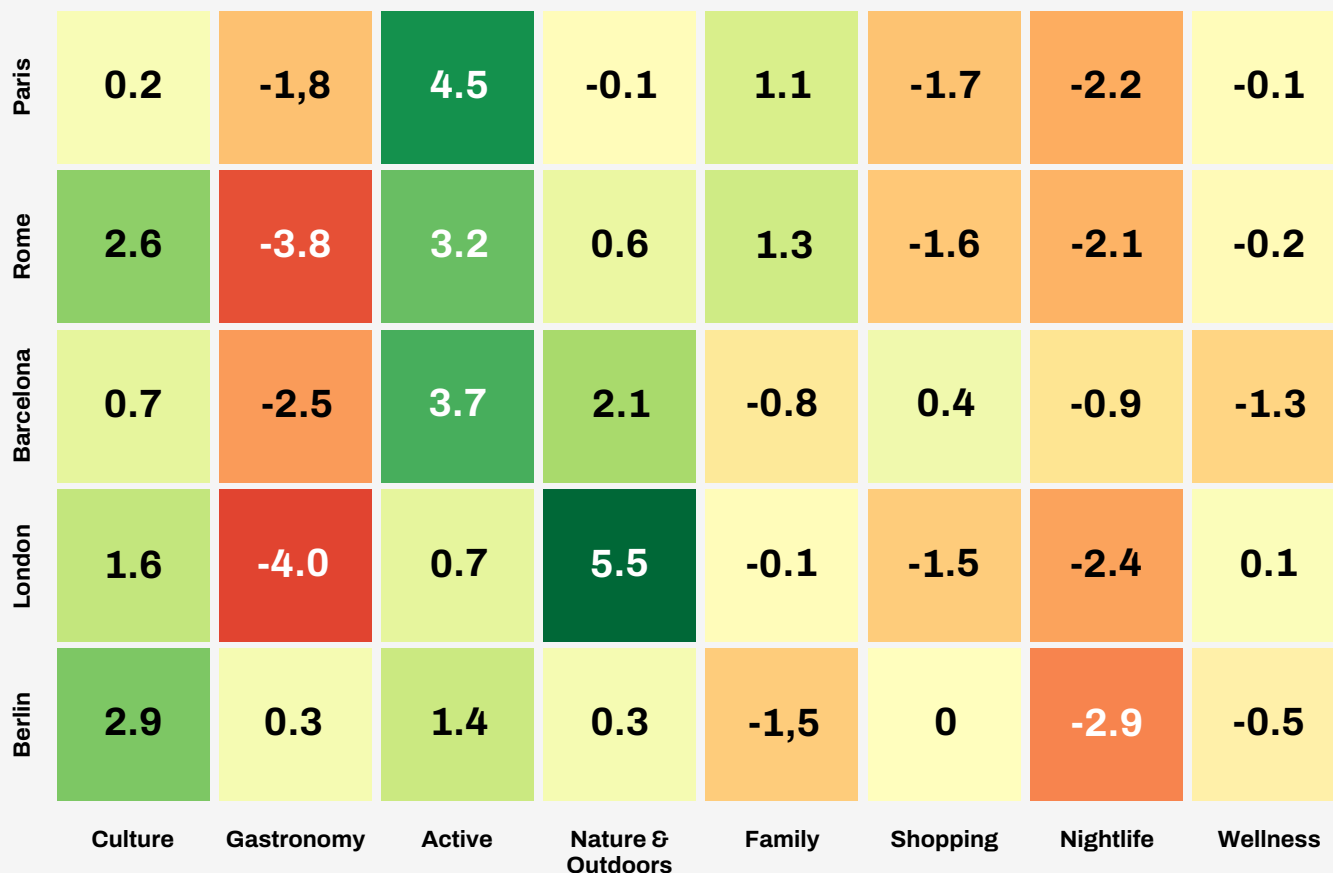
In contrast, interest in **active and nature tourism** is on the rise.

The “**Nature & Outdoors**” driver—as parks, by-the-river strolling,—has gained considerable traction, particularly in **London**, where it has increased by **+5.5 percentage points** since 2019, now ranking as the city's third most relevant travel driver.

Similarly, **active experiences** —such cycling— have seen meaningful growth in **Paris (+4.5 pp)**, as well as in **Rome and Barcelona**, confirming a broader trend toward **movement, mood-boosting environments, and meaningful interaction with the destination.**

Variation in travel drivers: Top 5 cities

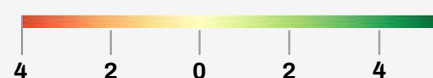
(2024 vs 2019)



Source:



Change in % Points



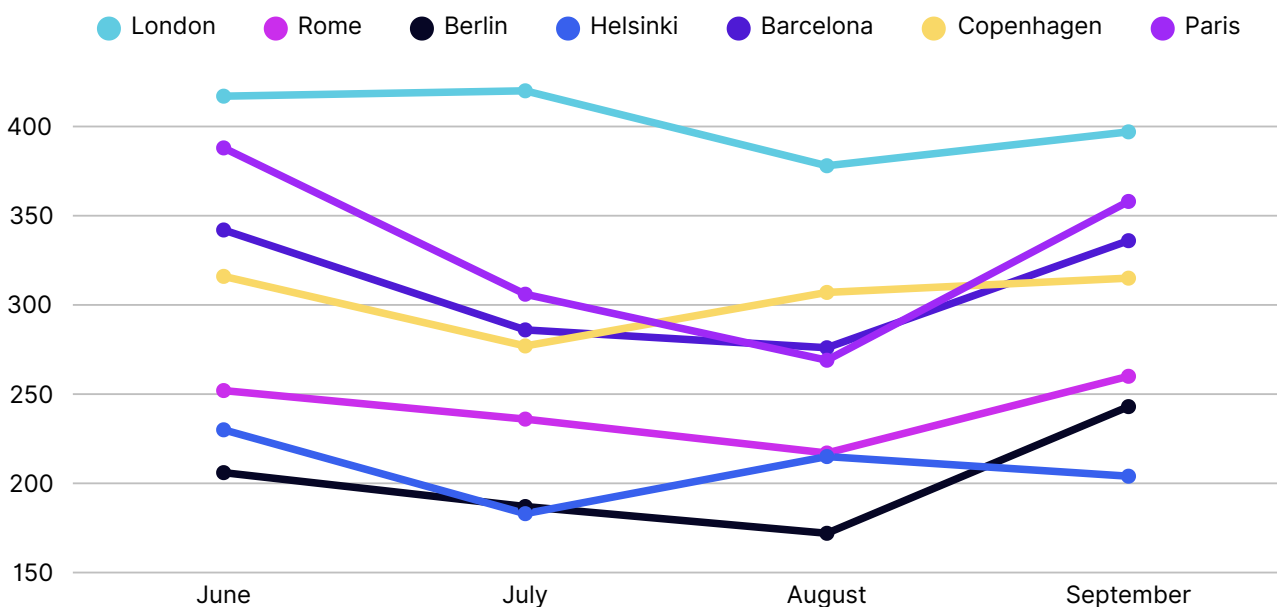
OTA rates: When do tourists really arrive?

Tracking hotel prices on major Online Travel Agencies (OTAs) offers destinations a valuable lens into travel demand. As room availability shrinks and interest grows, prices react—particularly around weekends, national holidays, and major events.

Analysing OTA rates from **June to September 2025** across the seven major European cultural capitals reveals not only wide price differences between destinations, but also **clear seasonal patterns** and demand signals that highlight when—and why—travellers are arriving.

Monthly average rates by city (EUR)

Analysis period: June 1 – September 30, 2025



KEY INSIGHTS

London leads the summer pricing race, while Berlin and Helsinki remain affordable

London commands the highest rates throughout the entire summer season, with an average **year-on-year increase of +10.6%**. Even as prices dip in August, they remain well above other cities—likely reflecting the city’s **uninterrupted appeal** and an **extensive calendar of cultural and entertainment events**.

Rome registers the **highest overall rate increase vs. 2024 (+13.2%)**, with the sharpest spikes between **mid-July and mid-August**. However, **the most expensive months remain June and September**, confirming a growing preference for travel at the edge of peak season.

At the other end of the spectrum, **Berlin and Helsinki offer the most budget-friendly options**.

Berlin’s rates bottom out in **August at €172**, before rising sharply at the end of September—likely in connection with the opening of **Oktoberfest in Berlin**, which usually drives high international demand.

Helsinki shows a dramatic **drop in late July**, with rates falling **by as much as 31–33%** compared to the same period in 2024. A likely factor is Coldplay’s “Music of the Spheres” Tour in 2024, which drove prices above €300 a night. With no comparable event this year, the market has remained stable.

Shoulder seasons are the new high season

Although August is traditionally considered peak season across Europe, major cultural cities often **experience a drop in visitor numbers—and, as a result, hotel rates—during this month**. This trend is largely driven by traveller preferences for coastal destinations during the hottest weeks of the year, as well as a decline in business travel.

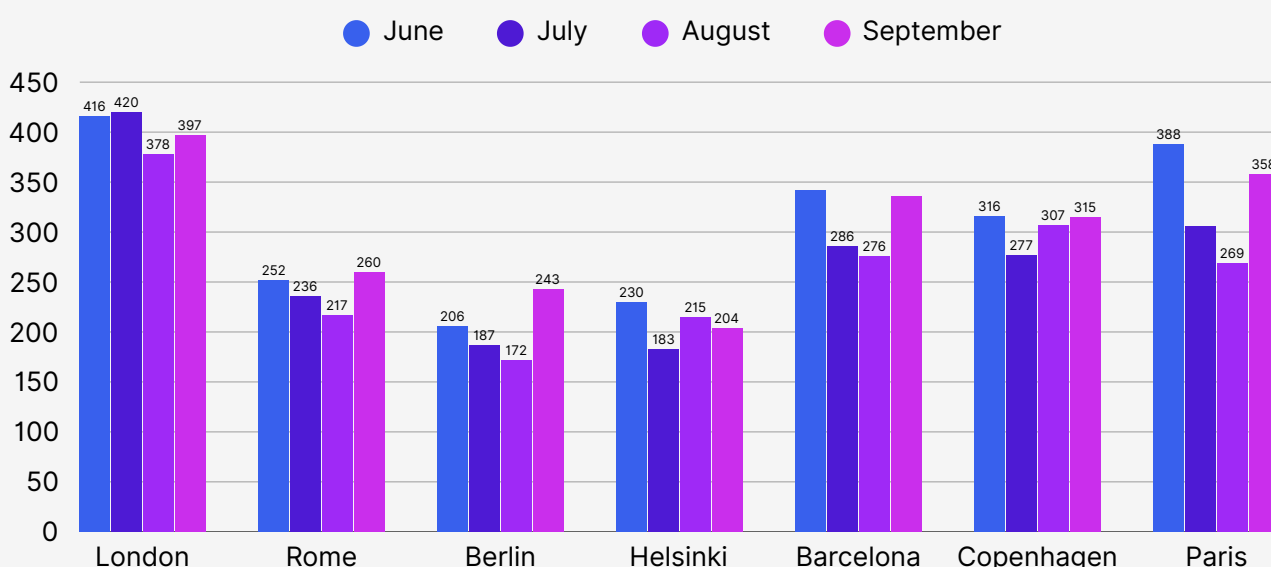
The data in this report confirms this seasonal pattern.

August is the most affordable month in most cities surveyed. Only **Helsinki and Copenhagen** break this trend, offering their lowest prices in July.

By contrast, **June and September see the highest average rates** across the board. This reinforces a trend already visible in 2024: a growing number of travellers are opting for **early- or late-summer getaways**, often to avoid extreme heat and heavy crowds, or inflated high-season flight costs.

This shift is particularly noticeable in **Paris and Barcelona**.

Average rates



Events and urban pulse: How festivals shape travel demand

Sudden spikes in arrivals are often driven not just by the weather but by the calendar.

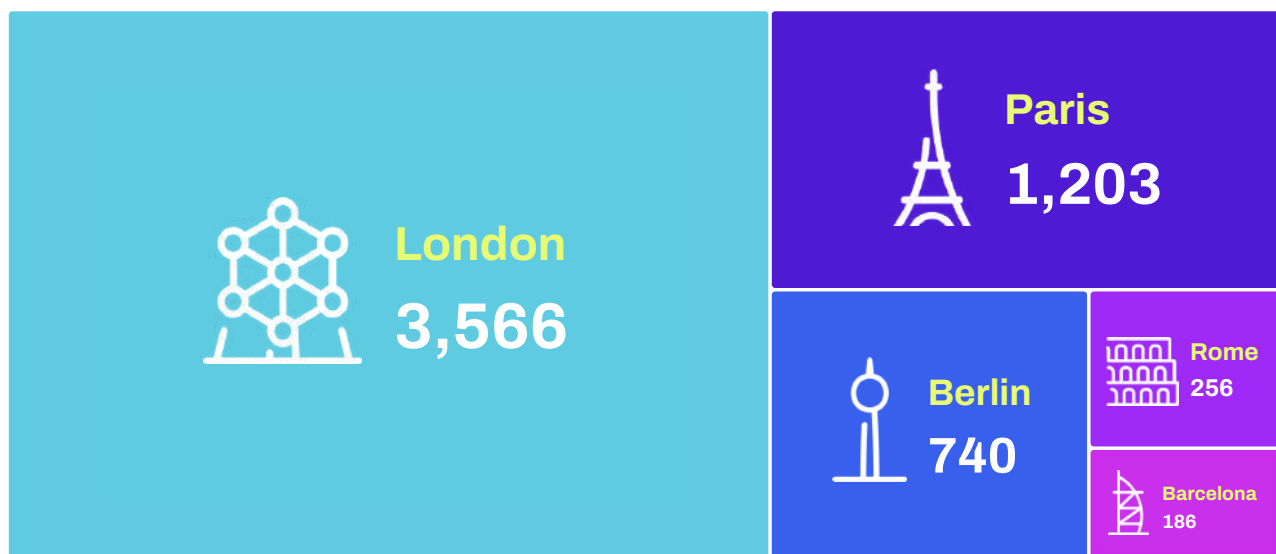
Events are among the most powerful magnets for tourism: they concentrate attention, compress demand, and amplify visibility far beyond the city itself. Concerts, festivals, sporting competitions, and cultural parades not only fill hotel rooms—they influence **pricing, sentiment, and even perception** of the destination.

By analysing data from the Event Module in **D/Al Destinations**, we can better understand how cities perform as cultural stages—and when.

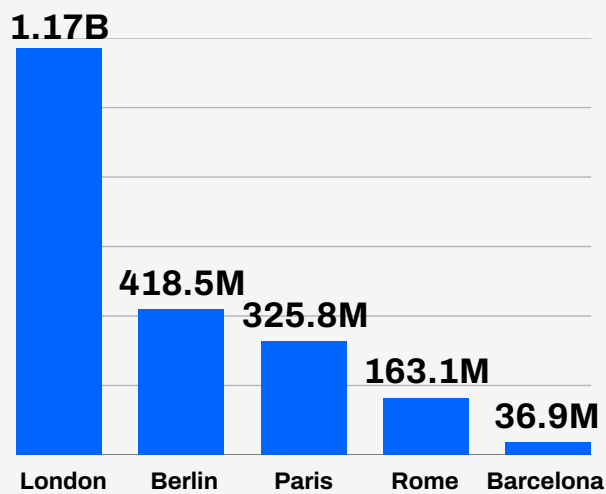
Event performance at a glance

Analysis period: June 1 – September 30, 2025

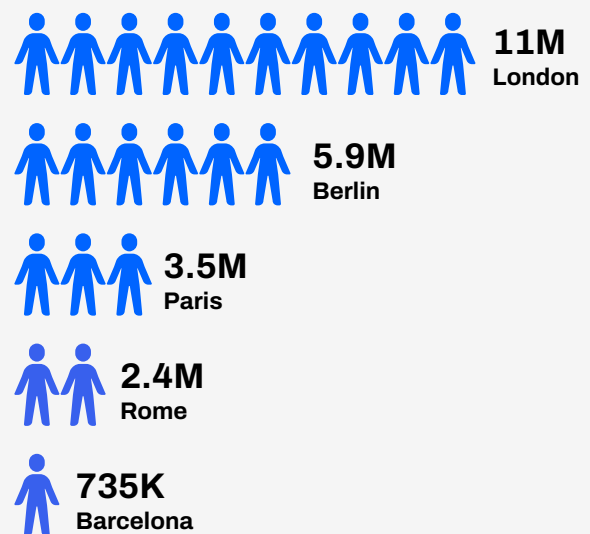
Number of events



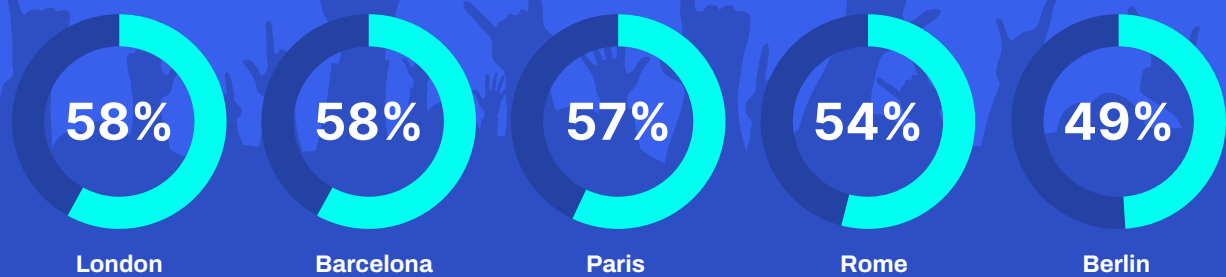
Estimated spend (€)



Attendance



Dominant format: **Concerts**



Peak months



Most profitable type of event (€)



KEY INSIGHTS

June and September are the new power months

In nearly every city analysed, the peak in both **attendance and OTA prices occurs in June or September**—months once considered “shoulder” periods.

Paris, Berlin, and London all see their most lucrative events and pricing surges outside the core holiday season.

In **Rome and Barcelona**, June is the clear launchpad for summer tourism.

These months now combine **pricing leverage** with **experience quality**: fewer crowds, better weather, and a higher density of events.

Concerts dominate attention, but festivals drive deeper value

Concerts are by far the most frequent event type across all cities. But when it comes to economic impact, **festivals consistently outperform**—especially in **Berlin and London**, where fewer but longer events drive **extended stays**, and attendees generate **higher tourism spending**.

In Berlin, **festivals account for nearly half of total event spend (€200.4M)**. In London, they generate over €533 million, making up the single largest share of the city's €1.17 billion total event economy.

Concert attendance and frequency have not only returned to normal but have surpassed previous levels too.

Destinations stand to gain the most from this boom. Download our exclusive eBook to discover how to host successful concerts and music festivals using destination data.

[Download](#)

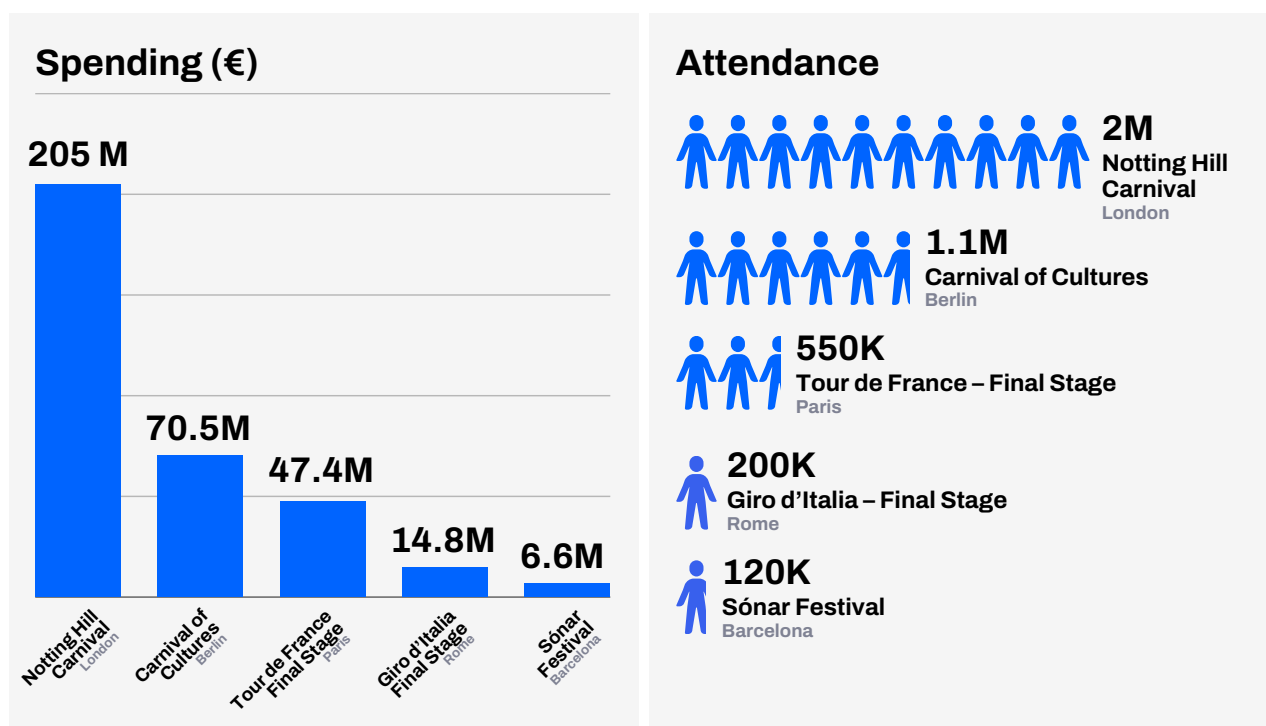
Flagship events that attract the most visitors and revenue

Every city has its iconic moments—the festivals, races, and gatherings that shape its seasonal pulse and leave a lasting mark on both visitors and local economies. While some events stand out for their sheer scale, others punch above their weight in terms of **tourism spending and international reach**.

Let's compare the **top-performing events** in each destination, based on attendance and estimated tourism impact.

Top events by city – Attendance and tourism spending

Analysis period: June 1 – September 30, 2025



Cycling sets the pace in Paris and Rome: In both capitals, it's two cycling giants—the **Tour de France** and the **Giro d'Italia**—that generate the greatest impact in terms of footfall and economic return. The Tour de France Grand Finale on the 27th of July clearly will draw an estimated 550 thousand spectators and generating over €47 million in tourism-related revenue.

Carnival magic powers London and Berlin: Bright costumes, music, street food, and a global atmosphere—this is the winning formula behind the most impactful summer events in London and Berlin. In London, the **Notting Hill Carnival attracts 2 million attendees** and stands as the single most powerful tourism driver among the cities analyzed, drawing in more than 205 million revenues. **In Berlin, the Carnival of Cultures** draws over 1.1 million visitors, celebrating multiculturalism and creativity with high tourism value.

Barcelona bets on smaller, high-quality events: Compared to its peers, Barcelona hosts fewer large-scale events—but this appears to be a conscious strategic choice. As one of the most visited cities in the world, and one of the most exposed to overtourism risk, Barcelona seems to **prioritise curated, lower-impact experiences that offer cultural value without exacerbating crowding.**

The Sónar Festival—a leading event in electronic music and digital culture—is the city’s flagship moment. Though far smaller in scale than the giants of Paris or London, it attracts around 120,000 attendees and generates €6.6 million in tourism spending, balancing brand impact with urban sustainability.



Strategic takeaways for destinations and tourism managers

Tourism is evolving—and destinations that want to stay ahead must move beyond intuition. **They need real-time signals, credible insights, and a clear understanding of how travellers behave, spend, and respond to experiences.**

The data in this report is more than just a snapshot of summer 2025. It's a blueprint for smarter strategy—one that balances growth with livability, and visitor satisfaction with long-term impact.

So, what should destinations do with this knowledge?

Based on the trends we've identified, and our experience working with leading DMOs across Europe, we've distilled a set of practical takeaways for tourism professionals—especially in urban, high-density destinations.

Every city is different. Context matters. But one thing holds true: the more strategic and data-informed the decisions, the stronger and more resilient the outcomes.



1 - Double down on attractions

Attractions consistently receive the highest sentiment scores across all cities (often >90), acting as the emotional and experiential heart of a trip.

What to do:

- Invest in **maintenance and enhancement** of cultural landmarks, museums, parks, and historical sites.
- Expand access through **digital guides, city passes, or skip-the-line experiences**.
- Curate **thematic itineraries** to deepen engagement and storytelling.

2 - Improve Traditional Hospitality Experiences

Hotel sentiment lags behind STRs in nearly every city analysed. Travellers—especially locals—expect more than the basics.

What to do:

- **Offer training** for hotel owners and staff, particularly in 3–4 star categories.
- **Share Sentiment reports with operators and stakeholders**, to better understand and address visitors' preferences and meets their expectations.

3 - Use Sentiment as a dynamic KPI for destination management

Sentiment isn't static—it responds to infrastructure, service levels, pricing, and events. It's one of the clearest signals of perception and readiness.

What to do:

- Track sentiment **not only by city but by sector and nationality**, to identify early warning signs or areas of opportunity.
- Include sentiment in **annual performance reviews and event impact reports**.
- Use it to **prioritise funding, guide marketing focus**, or benchmark progress year over year.

4 – Invest in active and nature-based experiences

Even in urban settings, more and more travelers are seeking opportunities to **move, recharge, and reconnect with nature**. Active and outdoor experiences aren't just for countryside escapes—they're becoming central to the city break as well.

What to do:

- **Provide clear, accessible guides** to walking routes, cycling paths, and outdoor activities available within the city.
- Organize **free or low-cost guided tours** in parks and green spaces to tap into the growing demand for light activity and urban relaxation.
- Invest in the **green revitalisation of under-visited neighbourhoods**—reducing pressure on the historic centre while creating new points of interest and pride.

5 – Spread events more evenly across the summer

Many cities concentrate their major events in June and September—while **August often sees a drop in both activity and visitor satisfaction**.

Meanwhile, destinations like London maintain consistent cultural programming throughout the entire season, keeping demand high and better distributed.

A more balanced event calendar helps avoid overcrowding, supports local businesses across a longer window, and keeps both visitors and residents engaged—even during traditionally quiet weeks.

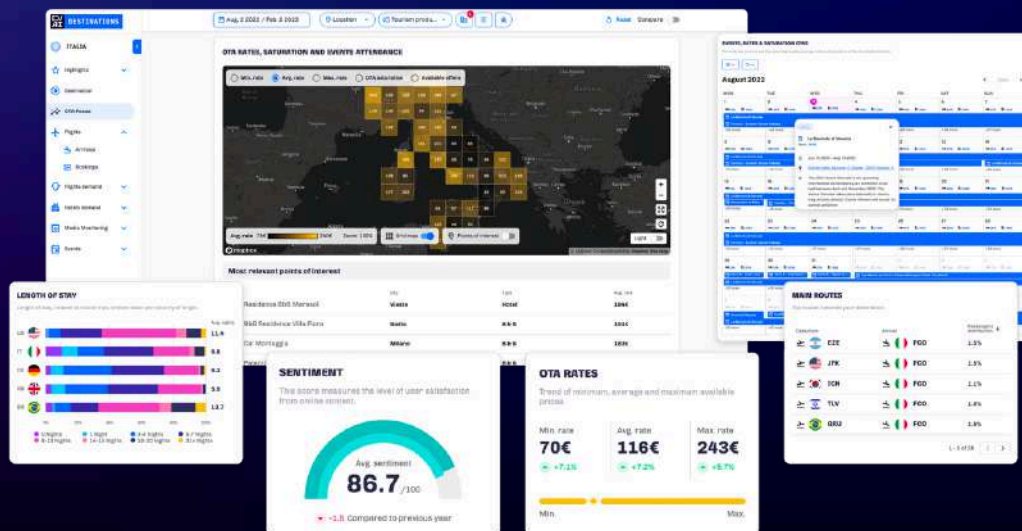
What to do:

- **Audit your current event calendar:** identify gaps in July and August and explore how they could be filled with smaller-scale concerts, community events, or wellness and food festivals.
- Promote lesser-known districts by hosting events in off-centre locations, which can help **redistribute footfall** and reveal new stories within the city.

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to help you make the most strategic decisions

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- **Traveller behaviours and preferences**
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- **Comparisons:** year-on-year and against competitors
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The Data Appeal Company

The Data Appeal Company SpA (formerly Travel Appeal) was founded in 2014 and acquired in 2022 by Almaxwave SpA, a company listed on the Euronext Growth Milan market of the Italian Stock Exchange and part of the Almaxviva group.

Utilising a proprietary algorithm based on artificial intelligence, machine learning, and semantic analysis, Data Appeal collects, measures, and analyses all publicly posted feedback online.

It merges this feedback with geographical and contextual data, helping businesses across industries leverage insights to guide decisions and gain a competitive edge.

The company's goal is to democratise and simplify the use and comprehension of data, assisting businesses and institutions in making effective and informed decisions.

This, in turn, aims to accelerate progress towards a more sustainable and inclusive world.

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