

2025 – Updates & Trends

ITALY:

Nordic countries remain trendy destinations for Italian travelers.
Shoulder season travel is growing.

'Coolcations' appear to be a lasting trend.

Early bookers

Return of the Italian groups

Direct investment from TOs

Over tourism in some destinations

Italy ranks first in train travel among European countries.



2025 - Travel patterns & Insights

ITALY

Outbound growth of 12% expected in 2025, with increasing spending.

Long-distance travel becoming a priority.

Luxury segment: €6,000+ travel growth of 15%, especially among 45-65 year-olds.

Real signs of slow, sustainable, off-season tourism and authentic experiences.

Increase in sustainable products in the region drives sustainable travel demand



2025 - Updates & Trends

SPAIN:

Finland is the top destination choice for Spaniards in winter.

Norway is the most popular summer option.

Spain is the 3rd largest market worldwide, for visitors to Finnish Lapland in December

Spain now has the highest expected growth rate of all markets to Finland.

New direct flight routes (2025): Bilbao–Stockholm, Valencia–Oslo, Alicante–Riga

Spain is the hub for LATAM travelers to Europe

2025 - Travel patterns & Insights

SPAIN

Moderate growth follows record growth.

After 2024, a more moderate increase in 2025

Personalisation, AI technology and tailor-made itineraries are gaining ground.

Short breaks, 1-3 day trips dominate the market

A real preference for more local destinations.

Seasonal adjustment – some holidays shifted to autumn season, September/October!

New trendy destinations for Spain: Japan, Thailand, Argentina, and Switzerland



2026 – Outlook & Indicators

ITALY

Italian outbound tourism to the Nordic and Baltic region is rapidly expanding

Travelers seek authenticity, nature, sustainability, and seasonality

Destinations are responding with diverse offerings, extraordinary natural environments, and a growing infrastructure

SPAIN

Continued interest in coolcations: +30% in bookings to Scandinavia and Iceland

Adventure tourism to Finland is looking really positive

Nordic region in general is booming and looks set to continue throughout the year



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