MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 12 | 06/22
This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the 12th wave of market research\(^1\) initiated in September 2020. Responses are collected from Europeans in 10 high-volume source markets.

- Travel sentiment remains strong, with 73% of surveyed Europeans planning to travel in the next 6 months, out of which 60% intend to travel more than once.
- 84% of travellers intend to take a trip during June-September, with peak interest in visiting Mediterranean destinations.
- The war in Ukraine did not affect the holiday plans of 44% of Europeans, while it caused 31% to make some changes to their original plans, and 4% cancelled their trip completely.
- Over one-third of Europeans state that their travel plans are unaffected by COVID-19 — the largest share since August 2020.

\(^1\)The data collection and research methodology are detailed in the methodological annex (slide 45)
WAVE 12
RESEARCH HIGHLIGHTS

- Sun & Beach (22%), Nature & Outdoors (15%) and City Break (15%) are the most preferred types of leisure trips for Europeans for summer 2022.

- Spending time in the great outdoors, seeing scenic European landscapes (19%), immersion in the local lifestyle (16%), and learning more about local gastronomy and delicacies (16%) are travellers’ most coveted experiences for their upcoming summer trip.

- 39% of Europeans will embark on a family vacation in the next six months, and 37% will travel with their partner.

- 47% of European travellers will take a plane to their next holiday destination, while 38% will drive.

- The 4-6 nights holidays are the most popular (34%), followed by 7-9 nights (27%); 31% of survey respondents plan to invest 500-1,000 euros per person on their upcoming trip.

- Over half of European travellers (52%) favour hotel stays, while interest in short-term rentals (15%) increases slightly compared to last summer (13%).
Pleasant weather, attractive deals and fewer crowds are the key criteria for the selection of a travel destination.

Europeans’ travel confidence rises, as indicated by the increase in the share of Europeans who have fully booked their upcoming trip (+6%) and the decrease in the level of uncertainty regarding the destination of their next trip (-4%).

Economic concerns regarding price inflation and personal finances are travellers’ key source of distress (31%), while the war in Ukraine (14%) emerges as an additional concern.

Although sentiment towards strict health & safety protocols drops (-12%) to its lowest point, the protocols remain essential for the comfort of 55% of European travellers.
• The expected travel peak from June to September, together with travellers’ preference for less crowded destinations, is an opportunity to promote lesser-known sites and attractions with better value for money deals.

• Considering the popularity of nature and outdoors trips, destinations could target, both domestic visitors and travellers from neighbouring countries: 35-54-year-old travellers on family trips and couples aged 54+ who want to enjoy nature and the landscape.

• In response to the high intentions to travel more than once in the warmer months, destinations are advised to plan campaigns aimed at attracting the first and subsequent waves of summer trips, with special offerings for return visits.

• ‘Localhood’ is of prime interest to Europeans; destinations are urged to promote local experiences that enable visitors’ immersion in the local culture and foster a positive interaction between local communities and visitors.
Coastal hotels/resorts targeting families may consider promoting packages of 4-9 nights complemented by travel experiences revolving around nature and the local cuisine, based on this segment’s high level of interest in such activities.

Bargains and attractive deals are now the second-most important criteria for Europeans when choosing a holiday destination. Businesses are encouraged to bundle tour packages at a reduced price or enhance their value with added experiences at no extra cost.

As Europeans’ travel confidence grows and the booking window elongates, businesses can already launch campaigns for the shoulder months since 75% of trips planned for the next 3-4 months are not yet fully booked.

Tourism businesses should maintain strict health & safety protocols, which remain highly important for over half of Europeans, even though travel concerns, specifically related to COVID-19, drop.
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1. Dates on the graphs refer to the following data collection periods for each research wave:

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<tr>
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<th>Wave 9</th>
<th>Wave 10</th>
<th>Wave 11</th>
<th>Wave 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey dates</td>
<td>10-18 Sep '21</td>
<td>23-31 Dec '21</td>
<td>1-9 March '22</td>
<td>9-12 May 2022</td>
</tr>
</tbody>
</table>

2. To present Wave 12 ‘timings in which respondents are most likely to take their next trip’, the following time periods should be used as a reference:
   - In 1-2 months; June-July 2022
   - In 3-4 months; August-September 2022
   - In 5-6 months; October-November 2022

3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents; 6,005
   - Respondents with short-term travel plans/most likely to travel in the next 6 months (‘early-bird’ travellers/ ‘travel-ready’ Europeans); 4,391
   - Respondents selecting outbound European destinations; 4,463

4. Significant changes between current and previous waves are calculated on a 2.5% significance level. Statistically significant differences are marked using the following symbols:
   - Increasing ▲, decreasing ▼
   - Numbers next to the arrows reflect the actual change in the share of respondents selecting a specific response between current and previous waves

6. All data and insights refer to domestic and intra-European travel, unless otherwise stated.
TRAVEL INTENTIONS
With summer coming, Europeans’ travel sentiment remains strong despite a minor drop (-4%).

Top 5 markets that are most likely to travel in the next 6 months:

- Poland 86.9%
- Spain 78.8%
- Italy 77.1% (7.5%* decrease)
- Netherlands 77.8%
- Germany 77.2%

Q9. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

**Intention to travel in the next 6 months**

- Poland: 86.9% (66.3% in Sep ’21, 61.1% in Dec ’21, 76.8% in March ’22, 73.1% in May ’22)
- Spain: 78.8% (16% in Sep ’21, 14% in Dec ’21, 10% in March ’22, 12% in May ’22)
- Italy: 77.1% (18.0% in Sep ’21, 24.6% in Dec ’21, 13.0% in March ’22, 15.2% in May ’22)
- Netherlands: 77.8% (7.5%* decrease in March ’22, 4.7%* increase in May ’22)

* Statistically significant difference vs previous survey period

No. of respondents: 6,005
Europeans aged 45+ remain the most eager to travel (78%), while sentiment among the youngest travellers (18–24 years old) is slightly weaker (62%).

Intention to travel in the next 6 months by age group:

Concerns regarding the economic situation, COVID-19 and the war in Ukraine are similar among all age groups, regardless of their travel sentiment.

May '22 survey:

Q9. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 6,005
Desire to travel is equally distributed between June-July (41%) and August-September (42%), with strong interest in intra-European travel.

Q12. When are you most likely to go on your next trip either in your country or within Europe?

- **June-September**
  - Sep ’21 survey: 69.7%
  - Dec ’21 survey: 83.7%
  - March ’22 survey: 55.3%
  - May ’22 survey: 50.3%

- **Within my country**
  - Sep ’21 survey: 28%
  - Dec ’21 survey: 51%
  - March ’22 survey: 27%
  - May ’22 survey: 25%

- **To a non-neighbouring European country**
  - Sep ’21 survey: 31.5%
  - Dec ’21 survey: 32.2%
  - March ’22 survey: 30.6%
  - May ’22 survey: 31.4%

- **To destinations outside Europe**
  - Sep ’21 survey: 10.8%
  - Dec ’21 survey: 12.5%
  - March ’22 survey: 11.0%
  - May ’22 survey: 8.9%

- **Do not know yet**
  - Sep ’21 survey: 10.4%
  - Dec ’21 survey: 11.0%
  - March ’22 survey: 10.2%
  - May ’22 survey: 9.5%

Q13. Where do you plan to travel in the next 6 months?

- **Within Europe**
  - Sep ’21 survey: 55.8%
  - Dec ’21 survey: 57.5%
  - March ’22 survey: 55.3%
  - May ’22 survey: 57.5%

- **Within my country**
  - Sep ’21 survey: 28%
  - Dec ’21 survey: 51%
  - March ’22 survey: 27%
  - May ’22 survey: 25%

- **To a non-neighbouring European country**
  - Sep ’21 survey: 31.5%
  - Dec ’21 survey: 32.2%
  - March ’22 survey: 30.6%
  - May ’22 survey: 31.4%

- **To destinations outside Europe**
  - Sep ’21 survey: 10.8%
  - Dec ’21 survey: 12.5%
  - March ’22 survey: 11.0%
  - May ’22 survey: 8.9%

- **Do not know yet**
  - Sep ’21 survey: 10.4%
  - Dec ’21 survey: 11.0%
  - March ’22 survey: 10.2%
  - May ’22 survey: 9.5%

**NOTE:** ‘This month’ is excluded from answering options from Wave 10 onwards.

**No statistically significant differences between waves were recorded.**
Q14. To which country(ies) do you plan to travel next?

PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

Croatia reaches the top 5 list, while Belgium enters the top 10 for the first time

TOP 10 COUNTRIES

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>10.2%</td>
</tr>
<tr>
<td>France</td>
<td>10.1%</td>
</tr>
<tr>
<td>Italy</td>
<td>9.6%</td>
</tr>
<tr>
<td>Greece</td>
<td>6.6%</td>
</tr>
<tr>
<td>Croatia</td>
<td>5.6%</td>
</tr>
<tr>
<td>Germany</td>
<td>5.2%</td>
</tr>
<tr>
<td>Portugal</td>
<td>4.9%</td>
</tr>
<tr>
<td>Turkey</td>
<td>4.0%</td>
</tr>
<tr>
<td>Austria</td>
<td>3.2%</td>
</tr>
<tr>
<td>Belgium</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

*Please use this map as a reference only

No. of respondents: 4,463

* No statistically significant differences between waves were recorded
Despite a minor decline, the vast majority of Europeans (73%) will still travel for leisure purposes in the following months.

Top 3 markets to take a leisure trip:
- Italy: 80.3%
- Netherlands: 80.0% (↑ 10.5%)
- Spain: 77.7%

Top 3 markets to take a business trip:
- Switzerland: 12.6%
- Austria: 6.7%
- Poland: 4.6%

Purpose of travel for respondents most likely to travel in the next 6 months:

- For leisure:
  - Sep '21 survey: 71.0%
  - Dec '21 survey: 63.4%
  - March '22 survey: 76.0%
  - May '22 survey: 73.3%

- To visit friends/relatives:
  - Sep '21 survey: 3.9%
  - Dec '21 survey: 5.3%
  - March '22 survey: 2.9%
  - May '22 survey: 2.4%

- For business:
  - Sep '21 survey: 6.5%
  - Dec '21 survey: 8.2%
  - March '22 survey: 4.6%
  - May '22 survey: 4.6%

- For conference or event:
  - Sep '21 survey: 18.6%
  - Dec '21 survey: 14.5%
  - March '22 survey: 14.2%

- For an event (sports, festival, etc.):
  - Sep '21 survey: 76.0%
  - Dec '21 survey: 70.4%
  - March '22 survey: 74.0%
  - May '22 survey: 70.2%

Results for business trip per country are indicative due to small sample bases.

Q11. For what reason are you most likely to travel within Europe next?

*Statistically significant change vs previous survey period

**In May '22, 'For an event for personal reasons' replaced 'For a conference or event'
Sun & Beach holidays are the most popular type of holidays; Nature & Outdoors and City Breaks climb to second place for the next 6 months.

Preferred type of leisure trip for respondents most likely to travel in the next 6 months:

- **21.8%** Sun & Beach
- **14.3%** Coast & Sea
- **14.6%** City Break
- **4.0%** Culinary / Food & Wine
- **4.2%** Touring & Road Trip
- **14.6%** Nature & Outdoors
- **7.5%** Wellness & Relaxation

Compared to Sun & Beach holidaymakers, Nature & Outdoors travellers are more likely to travel domestically (48% vs. 35%) or to a neighbouring country (41% vs. 35%).

May '22 survey

* "Coast & Sea" and "Sun & Beach" holidays are separated in this survey because some destinations like the Netherlands, Denmark, the Baltic countries, etc., offer coast & sea experiences and sports (e.g. sailing) but they are not necessarily associated with sun & beach vacations and experiences like Spain, Italy, Greece, etc.*
Sun and Beach holidays are more alluring to younger and middle-aged travellers (18-44 years old), while those 55+ demonstrate a stronger preference for Culture and Heritage trips.
WHAT ARE THE TRAVEL STYLES OF EUROPEANS MOST WILLING TO TRAVEL IN THE NEXT MONTHS?

- 1 in 3 Europeans who intend to travel in the next 6 months describe themselves as City Life Enthusiasts who love visiting metropolitan areas and enjoying the variety of experiences they offer.
- The Sun & Beach Lovers and the Immersive Explorers are the other two big travel segments among Europeans planning to travel in the coming months.

The travel style reveals the true interest of travellers, regardless of the season or destination. It should be considered by destinations and tourism products and service developers as it can help optimise the travel experience.
## A Snapshot of German Travel Plans

**Travel horizon: June–November 2022**

### Travel Sentiment

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely</th>
<th>Very Likely</th>
<th>Neutral</th>
<th>Unlikely</th>
<th>Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '22</td>
<td>77%</td>
<td>11%</td>
<td>12%</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>Mar '22</td>
<td>81%</td>
<td>8%</td>
<td>12%</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>Dec '21</td>
<td>61%</td>
<td>16%</td>
<td>24%</td>
<td>16%</td>
<td>24%</td>
</tr>
</tbody>
</table>

**Travel Readiness**

- Destination not chosen: 10%
- Destination chosen but trip not booked yet: 28%
- Trip partially booked: 22%
- Trip fully booked: 40%

### Travel Planning

**Where To?**

- Neighbouring Country: 31%
- Non-Neighbouring Country: 26%
- Within my Country: 32%
- Outside Europe: 9%

**And with Whom?**

- With family: 45%
- With partner: 33%
- Solo: 10%

### Intended Length of Stay and Budget

<table>
<thead>
<tr>
<th>Length</th>
<th>Up to 3 nights</th>
<th>4-6 nights</th>
<th>7-9 nights</th>
<th>10-12 nights</th>
<th>Over 12 nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>Up to 500€</td>
<td>501-1.000€</td>
<td>1.001-1.500€</td>
<td>1.501-2.000€</td>
<td>2.001-2.500€</td>
</tr>
<tr>
<td></td>
<td>2.501-3.000€</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The intended budget is per person, including accommodation, transportation and travel activities.

### Popular Travel Periods

- June–July '22: 48%
- August–September '22: 35%
- October–November '22: 11%

### Top 3 Types of Trips

- Sun & Beach: 31%
- Nature & Outdoors: 19%
- Coast & Sea: 18%

### Top 5 European Destinations

- Italy: 11%
- Spain: 10%
- Austria: 9%
- Greece: 8%
- Turkey: 8%

*Significant increase or decrease vs previous survey period

**Based on total sample, without reference to domestic trips**

No. of respondents: 751 (total sample of respondents per country)
A SNAPSHOT OF BRITISH TRAVEL PLANS
Travel horizon: June-November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely</th>
<th>Very Likely</th>
<th>Neutral</th>
<th>Unlikely</th>
<th>Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '22</td>
<td>68%</td>
<td>14%</td>
<td>14%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Mar '22</td>
<td>82%</td>
<td></td>
<td>9%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Dec '21</td>
<td>53%</td>
<td></td>
<td>19%</td>
<td>29%</td>
<td></td>
</tr>
</tbody>
</table>

TRAVEL READINESS

- Destination not chosen: 33%
- Trip fully booked: 24%
- Destination chosen but trip not booked yet: 25%
- Trip partially booked: 18%

TRAVEL PLANNING

WHERE TO?

- ANOTHER EUROPEAN COUNTRY: 51%
- WITHIN MY COUNTRY: 33%
- OUTSIDE EUROPE: 11%

AND WITH WHOM?

- 43% with family
- 35% with partner
- 9% solo

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 18%
- 4-6 nights: 31%
- 7-9 nights: 32%
- 10-12 nights: 9%
- Over 12 nights: 10%

- Up to 500€: 23%
- 501-1,000€: 34%
- 1,001-1,500€: 17%
- 1,501-2,000€: 11%
- 2,001-2,500€: 7%
- 2,501-3,000€: 4%
- Over 3,000€: 4%

The intended budget is per person, including accommodation, transportation, and travel activities.

PREFERRED TYPES OF TRIPS & DESTINATIONS

- TOP 3 TYPES OF TRIPS
  - Sun & Beach: 30%
  - City Break: 20%
  - Coast & Sea: 13%

- TOP 5 EUROPEAN DESTINATIONS
  - Spain: 17%
  - Italy: 9%
  - France: 8%
  - Greece: 7%
  - Portugal: 5%

* Significant increase or decrease vs previous survey period
** Based on total sample, without reference to domestic trips

No. of respondents: 751 (total sample of respondents per country)
# A Snapshot of French Travel Plans

Travel horizon: June-November 2022

## Intention to Travel

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely / Very Likely</th>
<th>Neutral</th>
<th>Unlikely / Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '22</td>
<td>73%</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>Mar '22</td>
<td>75%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Dec '21</td>
<td>63%</td>
<td>12%</td>
<td>24%</td>
</tr>
</tbody>
</table>

## Travel Plans

### Where to?

- Neighbouring Country: 34%
- Non-Neighbouring Country: 14%
- Within My Country: 37%
- Outside Europe: 11%

### And with Whom?

- Trip fully booked: 37% (with family)
- Trip partially booked: 36% (with partner)
- Destination chosen but trip not booked yet: 11% (solo)

## Top 3 Types of Trips

- Culture & Heritage: 19%
- Sun & Beach: 18% (5% decrease)
- Coast & Sea: 17%

## Popular Travel Periods

- June-July '22: 33%
- August-September '22: 42%
- October-November '22: 13%

## Intended Length of Stay and Budget

- Up to 3 nights: 14%
- 4-6 nights: 32%
- 7-9 nights: 26%
- 10-12 nights: 12%
- Over 12 nights: 15%

- Budget:
  - Up to 500€: 17%
  - 501-1,000€: 28%
  - 1,001-1,500€: 20%
  - 1,501-2,000€: 15%
  - 2,001-2,500€: 8%
  - 2,501-3,000€: 7%
  - Over 3,000€: 5%

The intended budget is per person, including accommodation, transportation and travel activities.

## Top 5 European Destinations**

- Italy: 12%
- Spain: 11%
- Croatia: 6%
- Greece: 9%
- Portugal: 8%

**Based on total sample, without reference to domestic trips

No. of respondents: 750 (total sample of respondents per country)

* Significant increase or decrease vs previous survey period

** Based on total sample, without reference to domestic trips
A SNAPSHOT OF DUTCH TRAVEL PLANS
Travel horizon: June–November 2022

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely</th>
<th>Neutral</th>
<th>Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May ’22</td>
<td>78%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Mar ’22</td>
<td>71%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Dec ’21</td>
<td>52%</td>
<td>16%</td>
<td>32%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 19%
- Non-Neighbouring Country: 44%
- Within My Country: 18%
- Outside Europe: 14%

AND WITH WHOM?

- 40% with family
- 36% with partner
- 11% solo

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 15%
- 4-6 nights: 27%
- 7-9 nights: 25%
- 10-12 nights: 17%
- Over 12 nights: 16%

- Up to 500€: 13%
- 501-1,000€: 29%
- 1,001-1,500€: 21%
- 1,501-2,000€: 17%
- 2,001-2,500€: 9%
- 2,501-3,000€: 5%
- Over 3,000€: 6%

PREFERRED TYPES OF TRIPS & DESTINATIONS

- Top 3 Types of Trips:
  - Sun & Beach: 27%
  - Nature & Outdoors: 19%
  - City Break: 17%

- TOP 5 European Destinations**:
  - Spain: 13%
  - France: 12%
  - Germany: 8%
  - Italy: 8%
  - Belgium: 8%

* Significant increase ▲ or decrease ▼ vs previous survey period
** Based on total sample, without reference to domestic trips

No. of respondents: 501 (total sample of respondents per country)
A SNAPSHOT OF ITALIAN TRAVEL PLANS
Travel horizon: June-November 2022

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th></th>
<th>Intention to Travel</th>
<th>Travel Readiness</th>
<th>Popular Travel Periods</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May '22</td>
<td>77% ▼ 8%*</td>
<td>25%</td>
<td>35%</td>
</tr>
<tr>
<td>Mar '22</td>
<td>85%</td>
<td>40%</td>
<td>44%</td>
</tr>
<tr>
<td>Dec '21</td>
<td>67%</td>
<td>17%</td>
<td>11%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

<table>
<thead>
<tr>
<th>Where to?</th>
<th>Neighbouring Country</th>
<th>Non-Neighbouring Country</th>
<th>Within My Country</th>
<th>Outside Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>24%</td>
<td>23%</td>
<td>45%</td>
<td>6%</td>
</tr>
</tbody>
</table>

AND WITH WHOM?

<table>
<thead>
<tr>
<th>And with whom?</th>
<th>38%</th>
<th>38%</th>
<th>13%</th>
</tr>
</thead>
<tbody>
<tr>
<td>with family</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>with partner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>solo</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

INTENDED LENGTH OF STAY AND BUDGET

<table>
<thead>
<tr>
<th>Intended Length of Stay and Budget</th>
<th>Up to 500€</th>
<th>501-1.000€</th>
<th>1.001-1.500€</th>
<th>1.501-2.000€</th>
<th>2.001-2.500€</th>
<th>2.501-3.000€+</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%*</td>
<td>18%</td>
<td>29%</td>
<td>21%</td>
<td>15%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>47%</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>23%</td>
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<tr>
<td>9%</td>
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<td></td>
</tr>
<tr>
<td>7%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PREFERRED TYPES OF TRIPS & DESTINATIONS

<table>
<thead>
<tr>
<th>Top 3 Types of Trips</th>
<th>Cultural &amp; Heritage</th>
<th>28%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sun &amp; Beach</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>Coast &amp; Sea</td>
<td>13%</td>
</tr>
</tbody>
</table>

TOP 5 EUROPEAN DESTINATIONS

<table>
<thead>
<tr>
<th>European Destination</th>
<th>16%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
</tr>
</tbody>
</table>

* Significant increase ▲ or decrease ▼ vs previous survey period
** Based on total sample, without reference to domestic trips

No. of respondents: 750 (total sample of respondents per country)
A SNAPSHOT OF BELGIAN TRAVEL PLANS
Travel horizon: June–November 2022

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>INTENTION TO TRAVEL</th>
<th>May ’22</th>
<th>Mar ’22</th>
<th>Dec ’21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely / Very Likely</td>
<td>73%</td>
<td>72%</td>
<td>56%</td>
</tr>
<tr>
<td>Neutral</td>
<td>13%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Unlikely / Very Unlikely</td>
<td>14%</td>
<td>16%</td>
<td>29%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?
- Neighbouring Country: 37%
- Non-Neighbouring Country: 30%
- Within My Country: 16%
- Outside Europe: 12%

AND WITH WHOM?
- 43% with family
- 32% with partner
- 13% solo

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 17%
- 4-6 nights: 27%
- 7-9 nights: 24%
- 10-12 nights: 16%
- Over 12 nights: 16%

- Up to 500€: 17%
- 501-1000€: 27%
- 1001-1500€: 24%
- 1501-2000€: 16%
- 2001-2500€: 16%
- 2501-3000€: 12%
- Over 3001€: 4%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS
- Sun & Beach: 22%
- Nature & Outdoors: 18%
- Coast & Sea: 16%

TOP 5 EUROPEAN DESTINATIONS**
- France: 24%
- Spain: 13%
- Italy: 11%
- Portugal: 5%
- Turkey: 5%

* Significant increase ▲ or decrease ▼ vs previous survey period
** Based on total sample, without reference to domestic trips

No. of respondents: 500 (total sample of respondents per country)
A SNAPSHOT OF SWISS TRAVEL PLANS
Travel horizon: June–November 2022

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '22</td>
<td>53%</td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
<td>Mar '22</td>
<td>54%</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>Dec '21</td>
<td>48%</td>
<td>14%</td>
<td>38%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 29%
- Non-Neighbouring Country: 23%
- Within My Country: 23%
- Outside Europe: 16%

AND WITH WHOM?

- With family: 26%
- With partner: 22%
- Solo: 17%

COMBINED WITH WHOM?

- Trip fully booked: 34%
- Trip partially booked: 24%
- Destination not chosen: 18%
- Destination chosen but trip not booked yet: 23%

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 19%
- 4-6 nights: 25%
- 7-9 nights: 21%
- 10-12 nights: 19%
- Over 12 nights: 17%
- Up to 500€: 14%
- 501-1,000€: 20%
- 1,001-1,500€: 15%
- 1,501-2,000€: 15%
- 2,001-2,500€: 12%
- 2,501-3,000€: 13%
- Over 3,000€: 10%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 17%
- Coast & Sea: 12%
- Nature & Outdoors: 11%

TOP 5 EUROPEAN DESTINATIONS**

- Italy: 10%
- France: 7%
- Germany: 7%
- Spain: 6%
- Portugal: 6%

* Significant increase ▲ or decrease ▼ vs previous survey period

** Based on total sample, without reference to domestic trips

No. of respondents: 500 (total sample of respondents per country)
A SNAPSHOT OF SPANISH TRAVEL PLANS
Travel horizon: June–November 2022

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>Intention to Travel</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May ’22</td>
<td>79%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Mar ’22</td>
<td>84%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Dec ’21</td>
<td>76%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 35%
- Non-neighbouring Country: 17%
- Within my Country: 41%
- Outside Europe: 4%

AND WITH WHOM?

- 37% with family
- 43% with partner
- 11% solo

TRAVEL READINESS

- Destination not chosen: 16% (fully booked: 16%, partially booked: 52%)
- Destination chosen but trip not booked yet: 15%

POPULAR TRAVEL PERIODS

- June–July ‘22: 25%
- August–September ‘22: 51%
- October–November ‘22: 13%

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 13%
- 4-6 nights: 47%
- 7-9 nights: 28%
- 10-12 nights: 8%
- Over 12 nights: 5%

- Up to 500€: 16%
- 501-1,000€: 36%
- 1,001-1,500€: 22%
- 1,501-2,000€: 13%
- 2,001-2,500€: 7%
- 2,501-3,000€: 4%
- Over 3,001€: 2%

The intended budget is per person, including accommodation, transportation and travel activities.

TOP 5 EUROPEAN DESTINATIONS**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>20%</td>
</tr>
<tr>
<td>Italy</td>
<td>13%</td>
</tr>
<tr>
<td>Portugal</td>
<td>10%</td>
</tr>
<tr>
<td>Germany</td>
<td>7%</td>
</tr>
<tr>
<td>UK</td>
<td>4%</td>
</tr>
</tbody>
</table>

** Based on total sample, without reference to domestic trips

* No. of respondents: 500 (total sample of respondents per country)
A SNAPSHOT OF POLISH TRAVEL PLANS
Travel horizon: June–November 2022

INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '22</td>
<td>87%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>Mar '22</td>
<td>82%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Dec '21</td>
<td>80%</td>
<td>13%</td>
<td>7%</td>
</tr>
</tbody>
</table>

TRAVEL READINESS

- Destination not chosen: 18%
- Trip fully booked: 31%
- Trip partially booked: 21%
- Destination chosen but trip not booked yet: 40%

POPULAR TRAVEL PERIODS

- June–July '22: 40%
- August–September '22: 43%
- October–November '22: 6%

TRAVEL SENTIMENT

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 24%
- Non-Neighbouring Country: 31%
- Within My Country: 34%
- Outside Europe: 6%

AND WITH WHOM?

- 46% with family
- 34% with partner
- 9% solo

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 13%
- 4-6 nights: 41%
- 7-9 nights: 30%
- 10-12 nights: 10%
- Over 12 nights: 6%

- Up to 500€: 20%
- 501-1,000€: 31%
- 1,001-1,500€: 19%
- 1,501-2,000€: 13%
- 2,001-2,500€: 10%
- 2,501-3,000€: 4%
- Over 3,001€: 4%

The intended budget is per person, including accommodation, transportation and travel activities.

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break: 19%
- Coast & Sea: 17%
- Culture & Heritage: 14%

TOP 5 EUROPEAN DESTINATIONS

- Croatia: 12%
- Italy: 10%
- Greece: 8%
- Germany: 7%
- Czech Republic: 7%

* Significant increase or decrease vs previous survey period
** Based on total sample, without reference to domestic trips

No. of respondents: 502 (total sample of respondents per country)
A SNAPSHOT OF AUSTRIAN TRAVEL PLANS
Travel horizon: June–November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May ’22</td>
<td>65%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Mar ’22</td>
<td>76%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Dec ’21</td>
<td>57%</td>
<td>15%</td>
<td>28%</td>
</tr>
</tbody>
</table>

TRAVEL READINESS

- Destination not chosen: 25%
- Trip fully booked: 31%
- Trip partially booked: 27%
- Destination chosen but trip not booked yet: 17%

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 31%
- Non-neighbouring Country: 26%
- Within My Country: 26%
- Outside Europe: 10%

AND WITH WHOM?

- With family: 30%
- With partner: 32%
- Solo: 11%

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 23%
- 4-6 nights: 36%
- 7-9 nights: 20%
- 10-12 nights: 12%
- Over 12 nights: 9%

The intended budget is per person, including accommodation, transportation and travel activities.

- Up to 500€: 19%
- 501-1.000€: 29%
- 1.001-1.500€: 17%
- 1.501-2.000€: 12%
- 2.001-2.500€: 9%
- 2.501-3.000€: 7%
- Over 3.000€: 6%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 21%
- Nature & Outdoors: 16%
- City Break: 13%

TOP 5 EUROPEAN DESTINATIONS**

- Italy: 14%
- Croatia: 8%
- Germany: 8%
- Spain: 6%
- Greece: 4%

* Significant increase or decrease vs previous survey period
** Based on total sample, without reference to domestic trips

No. of respondents: 500 (total sample of respondents per country)
TRIP PLANNING
58% of Europeans plan to take at least two trips by November 2022

Top 5 markets to take 2 or more trips within Europe in the next 6 months

- Austria: 64.0%
- Switzerland: 63.8%
- Belgium: 59.4%
- Germany: 61.9%
- Poland: 53.8%

Number of intended trips within Europe in the next 6 months

- 1 trip: 34.0%
- 2 trips: 37.9%
- 3 trips: 12.7%
- 4 trips: 4.0%
- 5+ trips: 4.0%
- Don’t know yet: 5.5%
- None: 7.7%

Travellers under 34 years of age are more likely to embark on multiple trips compared to their older counterparts (45+ years old)

Q10. How many trips do you plan to take in the next 6 months, within Europe?
Family trips maintain the lead for the upcoming months, especially for seaside holidays, while travellers who plan City Breaks or Culture & Heritage prefer to travel with their partner.
47% of European travellers intend to fly to their next destination, while 38% expect to drive.

Top 5 markets most likely to travel by plane in the next 6 months:

- **Spain** 63.7%
- **Poland** 49.5%
- **UK** 63.1% (8.7% decrease)
- **France** 46.2%
- **Italy** 57.3%

Q15. Which of the following modes of transport would you most consider using during your next trip within Europe?

- **By air**
- **By an owned car**
- **By train/bus**
- **By a rented car**
- **By ship or ferry**

*Up to September '21, 'By ship or ferry' were included in 'Other'.
**Statistically significant difference vs previous survey period.

No. of respondents: 4,391
The most popular length of stay for trips this summer is 4-9 nights.

32% of Sun & Beach holiday makers will stay for 7-9 nights, whereas Nature & Outdoors and City Break travellers prefer shorter trips, up to 6 nights.

Europeans planning Cruise, Culture & Heritage or Sun & Beach trips are more likely to spend 1,001-2,000 euros than the average traveller, who budgets <1,000 euros.

Q19. What would be the length of your next overnight trip?
Q20. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,391
Q16. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

- Hotel chain or resort
- Independent hotel/resort
- Friends and/or family
- Other paid serviced accommodation (bed and breakfast, etc.)
- Hostel/motel
- Camping/caravan
- Short-term rental via online platform
- Other

Over half of travel-ready Europeans favour hotel stays

Preferred type of accommodation for respondents most likely to travel in the next 6 months

- **May ’22 survey**: 52% preferred hotel stays, followed by independent hotels/resorts (24.4%), friends and/or family (15.3%), and other paid serviced accommodation (11.7%).
- **Mar ’22 survey**: 29.7% preferred hotel stays, followed by independent hotels/resorts (25.0%), friends and/or family (14.3%), and other paid serviced accommodation (11.1%).
- **Dec ’21 survey**: 26.5% preferred hotel stays, followed by independent hotels/resorts (23.4%), friends and/or family (13.5%), and other paid serviced accommodation (12.3%).
- **Sep ’21 survey**: 32.1% preferred hotel stays, followed by independent hotels/resorts (25.2%), friends and/or family (13.0%), and other paid serviced accommodation (14.2%).

52% of guests in short-term rentals will spend up to 1,000 euros on their next trip, compared to 41% among those staying at chain hotels or at resorts.

*Statistically significant difference vs previous survey period*

No. of respondents: 4,391
Europeans’ travel confidence rises: The number of travellers who have fully booked their next trip increases (+6%), while uncertainty over which destination to visit decreases (-4%).

Q21. Please select a response which best describes the planning for your next trip:

- I have not yet chosen where I will travel next
- I have chosen where I want to go but not yet booked/arranged my trip
- I have booked/arranged the accommodation for my next trip
- I have booked/arranged the transportation for my next trip
- I have booked/arranged all travel and accommodation components for my next trip

No. of respondents: 4,606

<table>
<thead>
<tr>
<th>Status of planning for the next trip</th>
<th>Sep ‘21 survey</th>
<th>Dec ‘21 survey</th>
<th>March ‘22 survey</th>
<th>May ‘22 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have not yet chosen where I will travel next</td>
<td>18,7%</td>
<td>21,1%</td>
<td>17,6%</td>
<td>13,4%</td>
</tr>
<tr>
<td>I have chosen where I want to go but not yet booked/arranged my trip</td>
<td>42,4%</td>
<td>42,2%</td>
<td>38,6%</td>
<td>33,7%</td>
</tr>
<tr>
<td>I have booked/arranged the accommodation for my next trip</td>
<td>8,8%</td>
<td>11,0%</td>
<td>10,2%</td>
<td>11,4%</td>
</tr>
<tr>
<td>I have booked/arranged the transportation for my next trip</td>
<td>8,2%</td>
<td>8,4%</td>
<td>7,5%</td>
<td>9,2%</td>
</tr>
<tr>
<td>I have booked/arranged all travel and accommodation components for my next trip</td>
<td>21,9%</td>
<td>17,4%</td>
<td>26,1%</td>
<td>32,2%</td>
</tr>
</tbody>
</table>

* Statistically significant difference vs previous survey period

No. of respondents: 3,822
Despite the growth in travel confidence, the booking window remains relatively narrow: almost half of the trips planned for June-July are only partially booked or are not yet booked.

**Booking status and timing of next trip**

- In 1-2 months (June-July):
  - Destination chosen, but trip not yet booked: 43.8%
  - Trip partially booked: 24.9%
  - Trip fully booked: 24.2%

- In 3-4 months (August-September):
  - Destination chosen, but trip not yet booked: 37.2%
  - Trip partially booked: 24.1%
  - Trip fully booked: 39.2%

- In 5-6 months (October-November):
  - Destination chosen, but trip not yet booked: 39.2%
  - Trip partially booked: 23.8%
  - Trip fully booked: 18.6%

**Booking status and travel destination**

- In my country:
  - Destination chosen, but trip not yet booked: 33.8%
  - Trip partially booked: 25.1%
  - Trip fully booked: 29.5%

- A neighbouring country:
  - Destination chosen, but trip not yet booked: 33.9%
  - Trip partially booked: 28.8%
  - Trip fully booked: 26.9%

- A non-neighbouring European country:
  - Destination chosen, but trip not yet booked: 31.9%
  - Trip partially booked: 21.9%
  - Trip fully booked: 29.3%

- Outside Europe:
  - Destination chosen, but trip not yet booked: 29.5%
  - Trip partially booked: 22.8%
  - Trip fully booked: 26.4%

**May ’22 survey**

Q21. Please select a response which best describes the planning for your next trip:

No. of respondents: 6,005
Q8. Which of the following travel experiences will you look for during your next trip in Europe?

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste the local cuisine and gastronomic products</td>
<td>16.4%</td>
</tr>
<tr>
<td>See famous landmarks</td>
<td>13.7%</td>
</tr>
<tr>
<td>Learn about history and culture</td>
<td>12.3%</td>
</tr>
<tr>
<td>Active holiday experiences</td>
<td>8.9%</td>
</tr>
<tr>
<td>Experience the local culture and lifestyle</td>
<td>15.8%</td>
</tr>
<tr>
<td>Enjoy nature, see scenic landscapes</td>
<td>18.5%</td>
</tr>
</tbody>
</table>

Baby boomers (over 54 years old) demonstrate higher interest in tasting the local cuisine, experiencing the local culture and learning about history and culture, while Gen Z travellers (18-24 years old) care more about active holidays and spa & wellness.

Spending time in the great European outdoors, (19%), immersion in a destination’s lifestyle (16%), and learning more about local gastronomy are travellers’ most anticipated experiences for the next months.

* New question

May ‘22 survey

No. of respondents: 4,391
Pleasant weather, attractive deals and fewer crowds are the key elements for the selection of a holiday destination this summer.

Top 8 criteria for choosing the next travel destination:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasant weather conditions</td>
<td>16.9%</td>
</tr>
<tr>
<td>Bargains and attractive deals</td>
<td>14.9%</td>
</tr>
<tr>
<td>Not crowded</td>
<td>10.6%</td>
</tr>
<tr>
<td>Friendly and welcoming locals</td>
<td>9.8%</td>
</tr>
<tr>
<td>Fully lifted travel restrictions</td>
<td>9.0%</td>
</tr>
<tr>
<td>Health &amp; safety protocols</td>
<td>8.5%</td>
</tr>
<tr>
<td>Effectiveness in managing COVID-19</td>
<td>7.6%</td>
</tr>
<tr>
<td>Direct transport routes</td>
<td>7.2%</td>
</tr>
</tbody>
</table>

May '22 survey

Q6. What criteria will play the most important role in choosing your next holiday destination?

No. of respondents: 6,005
Over one-third of Europeans (34%) — the highest level since August 2020 — will execute their travel plans without any impact from COVID-19.

**How has COVID-19 affected travel plans?**

- **Did not plan to travel**
  - Sep '21: 15.1%
  - Dec '21: 15.8%
  - March '22: 12.8%
  - May '22: 10.1%

- **Did not make any change to the original plan**
  - Sep '21: 20.1%
  - Dec '21: 16.2%
  - March '22: 26.5%
  - May '22: 34.3%

- **Had to make some changes to their original plan**
  - Sep '21: 15.2%
  - Dec '21: 14.7%
  - March '22: 15.2%
  - May '22: 15.4%

- **Cancelled**
  - Sep '21: 14.4%
  - Dec '21: 9.7%
  - March '22: 9.8%
  - May '22: 9.2%

**Top 5 markets choosing domestic over international travel**

- **Italy**
  - May '22: 17.3%

- **Poland**
  - May '22: 14.7%

- **Spain**
  - May '22: 13.9%

- **Austria**
  - May '22: 12.4%

- **Germany**
  - May '22: 12.3%

* Statistically significant difference vs previous survey period

**No. of respondents:** 6,005

**Q2. If you were planning to take an overnight trip in the next 6 months within Europe, how has COVID-19 affected your plans?**

- I had not planned any overnight trips in the next 6 months
- It did not affect me at all
- I made the trip with some changes from the initial plan (accommodation/transport)
- I changed my trip from international to domestic
- I changed the destination so I can use my own vehicle to travel
- I rescheduled it for another date
- I cancelled my trip completely

Over one-third of Europeans (34%) — the highest level since August 2020 — will execute their travel plans without any impact from COVID-19.
The war in Ukraine had no effect on the travel plans of 44% of Europeans, but it caused 31% to make some changes to their original planning and 4% to completely cancel their trip.

How has the ongoing war between Russia and Ukraine affected your travel plans?

- I had not planned any overnight trips in the next 6 months (43.9%)
- It did not affect me at all (10.4%)
- I will wait and see how the war evolves before booking a trip (8.0%)
- I made the trip with some changes from the initial plan (accommodation/transport) (6.6%)
- I changed my trip from international to domestic (12.0%)
- I changed my itinerary to avoid countries neighbouring the conflict zone (4.1%)
- I rescheduled it for another date (5.7%)
- I cancelled my trip completely (9.2%)

Top 5 markets to make changes in their trip planning:

- Switzerland: 50.9%
- Italy: 44.3%
- Spain: 37.3%
- Austria: 37.1%
- Poland: 35.9%

Q3. How has the ongoing war between Russia and Ukraine affected your plans to travel within Europe in the next 6 months?

* New question

No. of respondents: 6,005
No. of respondents: 4,391

**EUROPEAN TRAVELLERS’ CONCERNS**

Economic concerns regarding price inflation (18%) and personal finances (13%) are travellers’ key sources of distress, while the war in Ukraine (14%) is an additional major concern.

**Q4. What currently concerns you the most about travelling within Europe?**

The answers to this question have been enriched in May ‘22, to include references to the war in Ukraine and cost & inflation issues.

---

** Leading concerns for those who are most likely to travel next **

- **17.9%**
  - Rise in the overall cost of my trip due to inflation

- **12.6%**
  - Economic situation and personal finances

- **9.5%**
  - Rising COVID-19 cases in the destinations I want to visit

- **8.0%**
  - Changes in travel restrictions during my trip

- **14.4%**
  - The ongoing conflict between Russia and Ukraine

- **10.7%**
  - Implementation of sudden quarantine measures during my trip

- **9.3%**
  - Becoming ill with COVID-19 during my trip

- **7.9%**
  - Booking and cancellation policies (refunds, etc.)

---

May ‘22 survey
Although sentiment towards strict health & safety protocols drops (-12%), the protocols remain essential for the comfort of 55% of European travellers.

The sentiment towards strict health & safety protocols is particularly high among travellers from Italy (77%) and Spain (71%), compared to 55% in the overall sample.

**This refers to the total sample**

* No significant changes between waves were recorded for this question

No. of respondents: 4,391
METHODOLOGICAL ANNEX

THE SURVEY

• The report is the result of online market research of Europeans who took at least 2 overnight trips during the last three years (2019-2022)

• Distribution/data collection period:
  - Wave 9: 10-18 September 2021; sample = 5,769 / Wave 10: 23-31 December 2021; sample = 6,002 / Wave 11: 01-09 March 2022; sample = 5,998 / Wave 12: 09-12 May 2022; sample = 6,005
  - Countries: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - Languages: English, French, German, Italian, Spanish, Polish and Dutch

• Research themes examined: Travel personas (1 question), Travel concerns and impact of external shocks on travel (7 questions) and Travel intentions, preferences and trip planning (13 questions)

• 47% of the Wave 12 survey respondents are male and 53% are female. Sample size and age groups are listed below:

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Study on Monitoring Sentiment for Intra-European Travel

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Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to completely eliminate every margin of error.

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