MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 12 | 06/22

EUROPEAN TRAVEL COMMISSION

Co-funded by the European Union

WAVE 12
RESEARCH HIGHLIGHTS

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%)

WAVE 12
RESEARCH HIGHLIGHTS

- **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.

WAVE 12
RECOMMENDATIONS FOR DESTINATIONS

- 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**.

WAVE 12
RECOMMENDATIONS FOR BUSINESSES

- 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.

CONTENTS

How to read

Wave 12

1. Dates on the graphs refer to the following data collection periods for each research wave:

	Wave 9	Wave 10	Wave 11	Wave 12
Survey dates	10-18 Sep '21	23-31 Dec '21	1-9 March '22	9-12 May 2022

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

01

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%

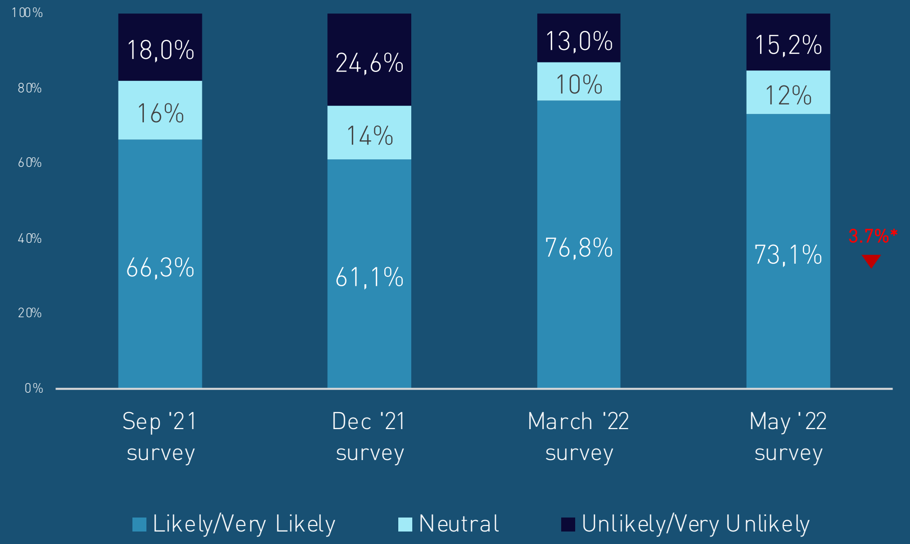
Spain
78.8%

Netherlands
77.8%
7%*

Germany
77.2%

Italy
77.1%
7.5%*

Intention to travel in the next 6 months



* Statistically significant difference vs previous survey period

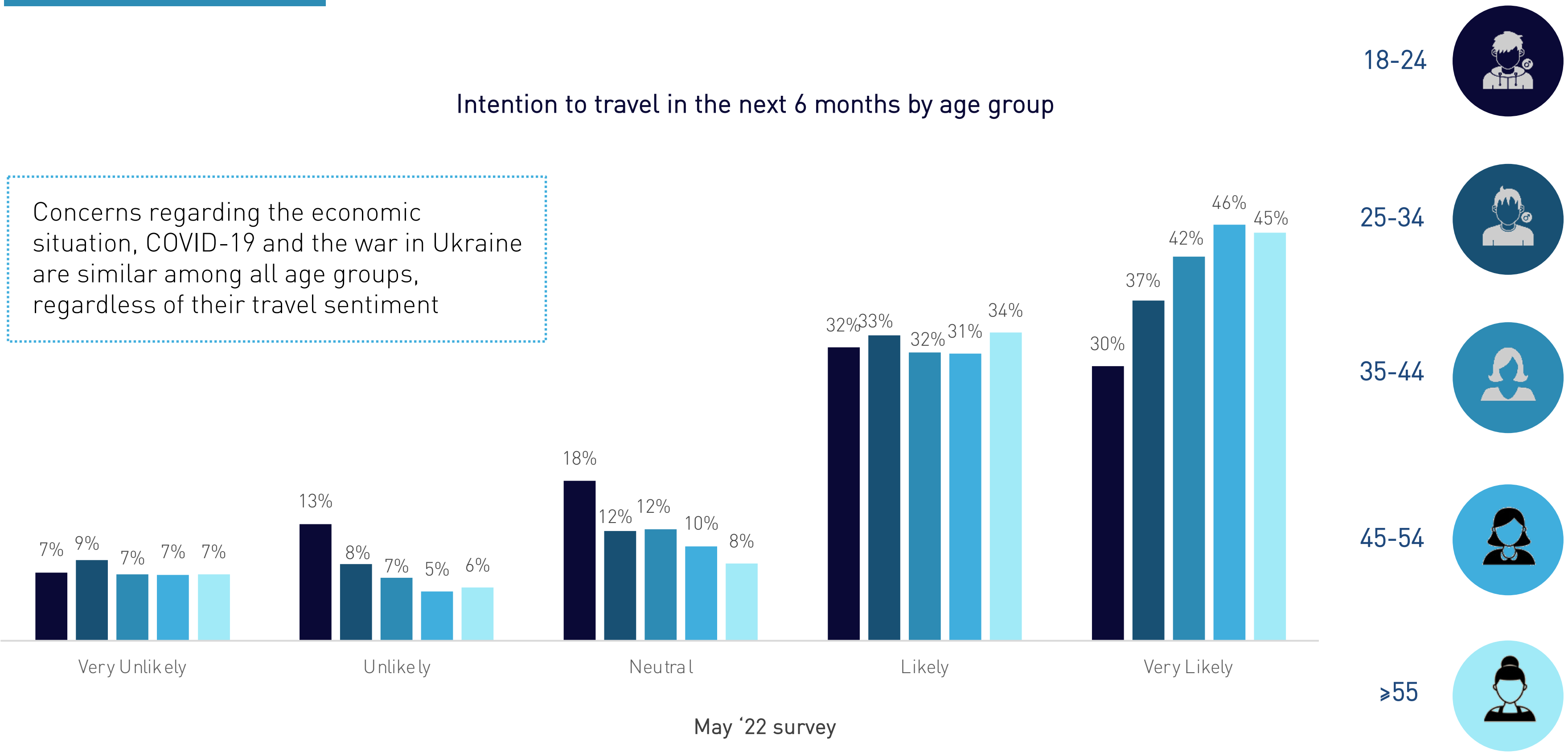
No. of respondents: 6,005

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

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



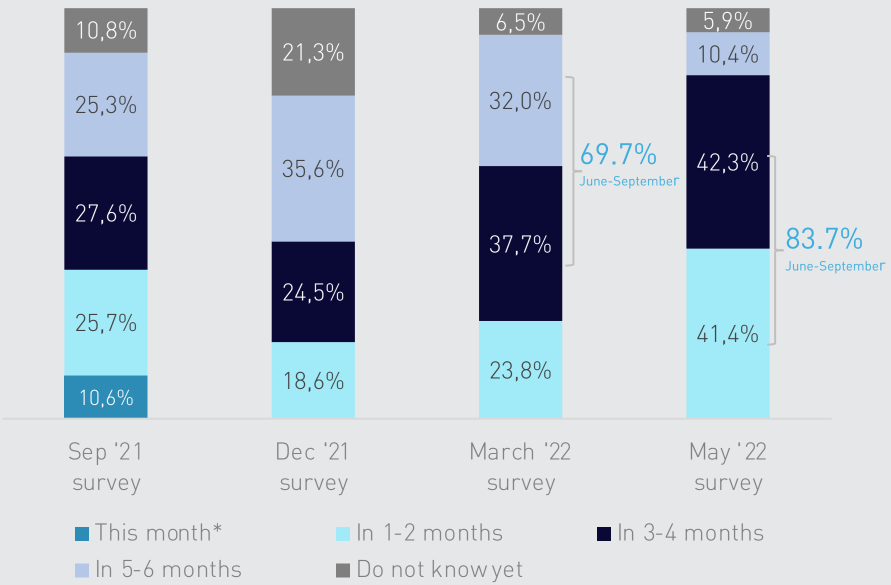
May '22 survey

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

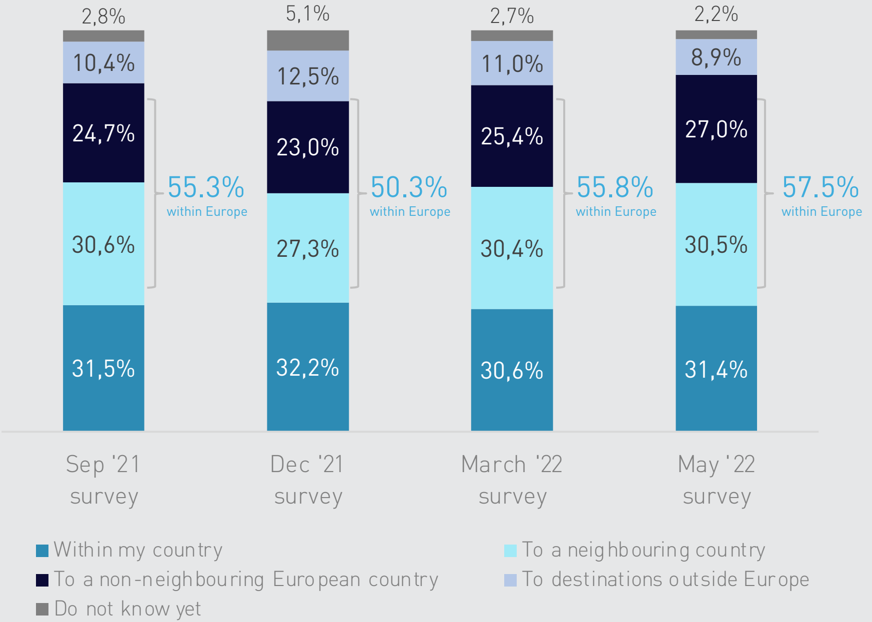
Desire to travel is equally distributed between June-July (41%) and August-September (42%), with strong interest in intra-European travel

When will Europeans travel next?



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

Where will Europeans travel within the next 6 months?



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

* NOTE: 'This month' is excluded from answering options from Wave 10 onwards

** No statistically significant differences between waves were recorded

No. of respondents: 4,391

May ‘22 survey

PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

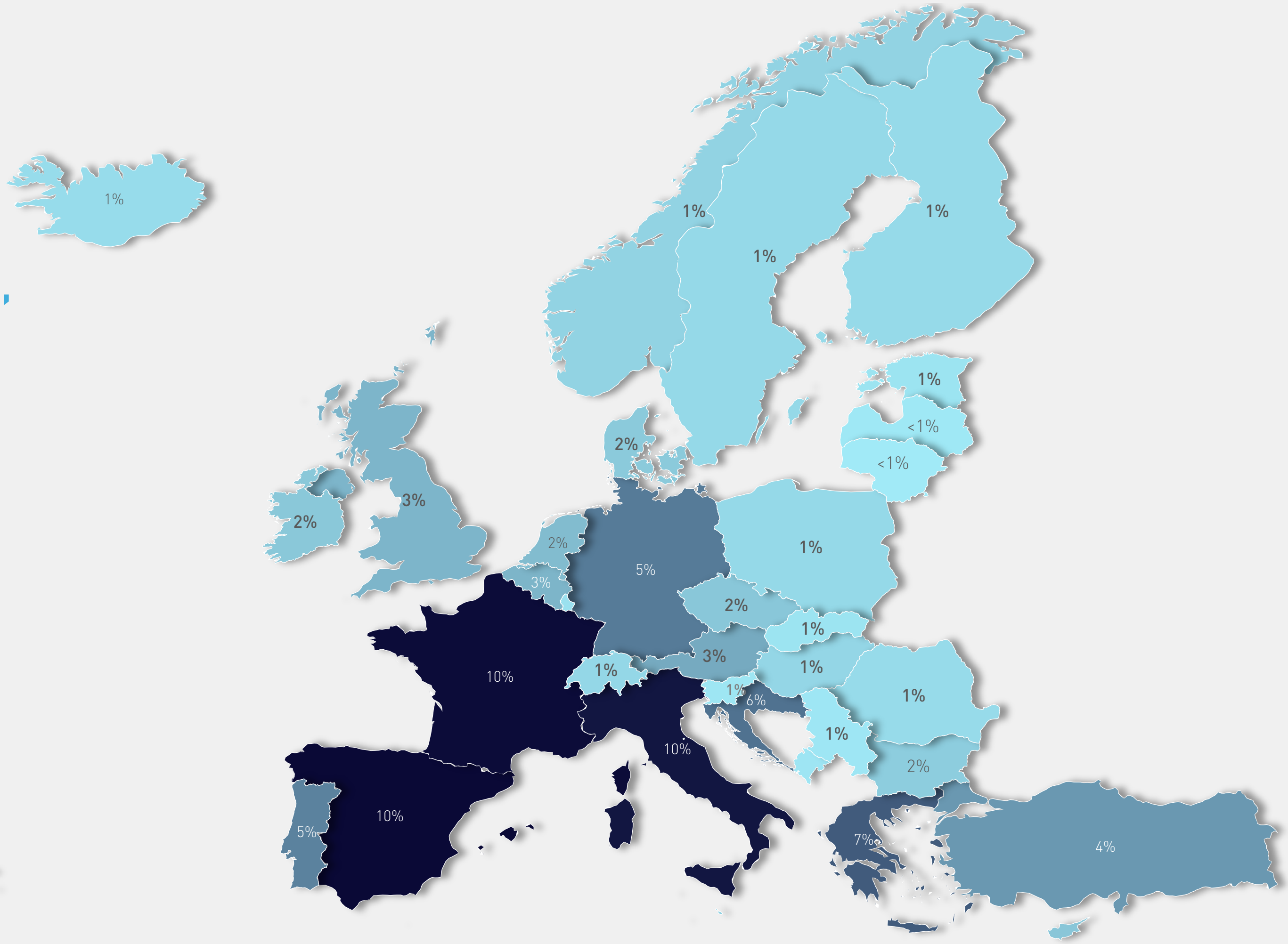
Croatia reaches the top 5 list, while Belgium enters the top 10 for the first time

TOP 10 COUNTRIES

Spain	10.2%
France	10.1%
Italy	9.6%
Greece	6.6%
Croatia	5.6%
Germany	5.2%
Portugal	4.9%
Turkey	4.0%
Austria	3.2%
Belgium	2.7%

*Please use this map as a reference only

No. of respondents: 4,463



* No statistically significant differences between waves were recorded

 Q14. To which country(ies) do you plan to travel next?

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%

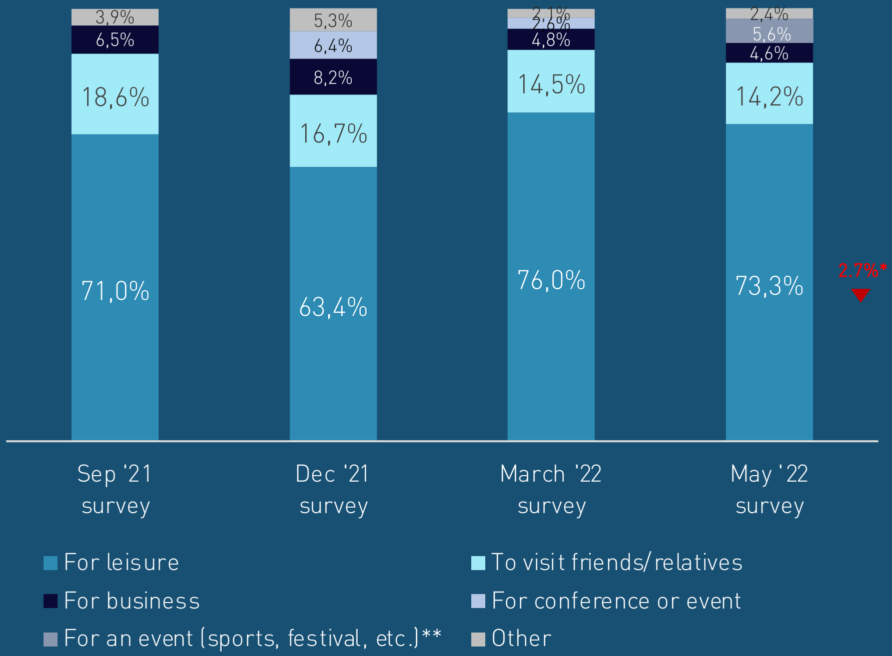
Top 3 markets to take a business trip

Switzerland
12,6%

Austria
6,7%

Poland
4,6%

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



* Statistically significant change vs previous survey period
**In May '22, 'For an event for personal reasons' replaced 'For a conference or event'
No. of respondents: 4,391

Q11. For what reason are you most likely to travel within Europe next?
Results for business trip per country are indicative due to small sample bases

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

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.

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%)

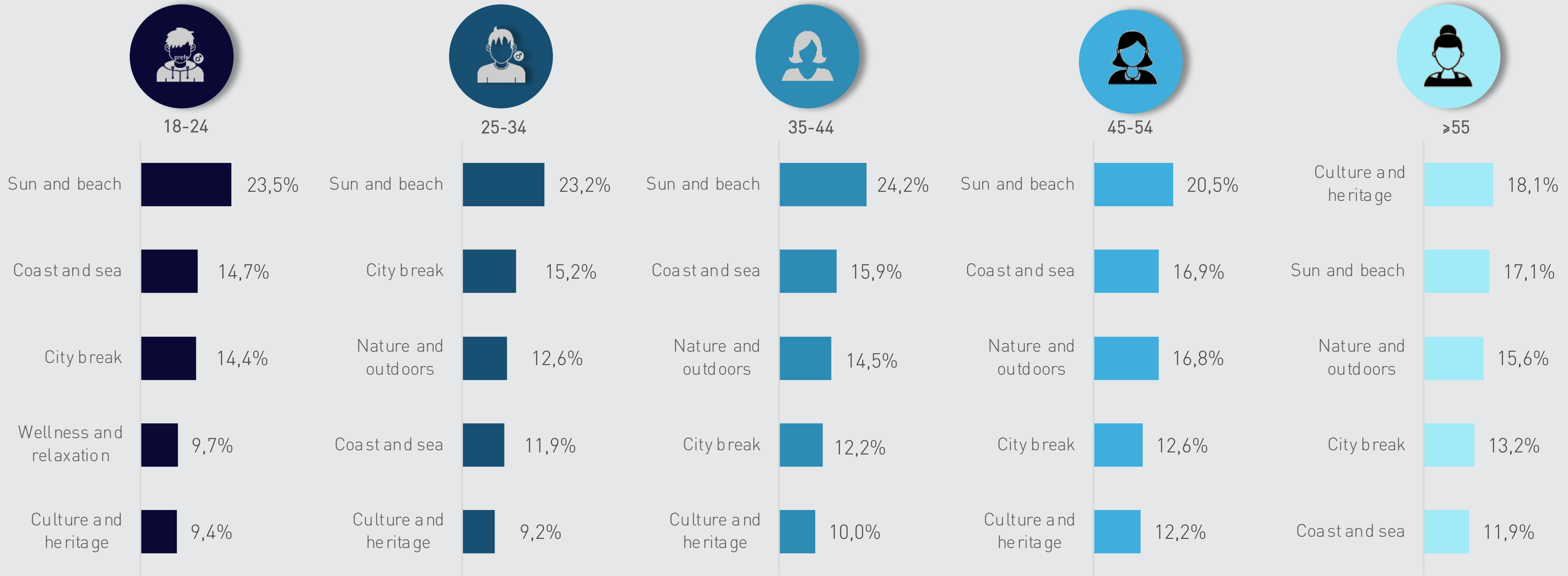
Q18. What type of leisure trip within Europe are you most likely to undertake next?

* Statistically significant difference vs previous survey period

No. of respondents: 4,391

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

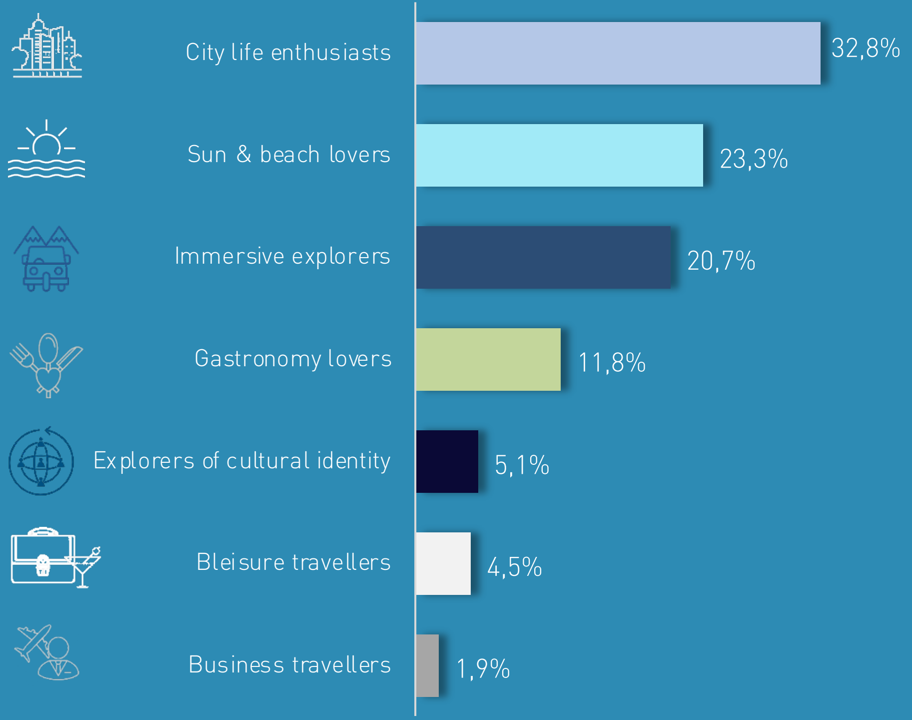
Top 5 types of trip by age group



Q18. What type of leisure trip within Europe are you most likely to undertake next?

No. of respondents: 6,005

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.

Q1. Which of the following statements best describes your travel preferences?

No. of respondents: 4,391

A SNAPSHOT OF GERMAN TRAVEL PLANS

Travel horizon: June-November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May 22	77%	11%	12%
Mar 22	81%	8%	12%
Dec '21	61%	16%	24%

TRAVEL READINESS

Trip fully booked	40% (7%* increase)
Trip partially booked	22%
Destination chosen but trip not booked yet	28%
Destination not chosen	10%

POPULAR TRAVEL PERIODS

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

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	31%
NON-NEIGHBOURING COUNTRY	26%
WITHIN MY COUNTRY	32%
OUTSIDE EUROPE	9%

AND WITH WHOM?

with family	45% (5%* increase)
with partner	33%
solo	10%

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
16%	30%	27%	14%	13%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
20%	32%	19%	12%	8%	4%	3%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach	31% (6%* increase)
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

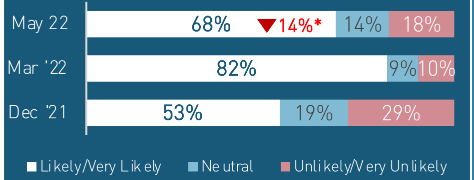
No. of respondents: 751 (total sample of respondents per country)

A SNAPSHOT OF BRITISH TRAVEL PLANS

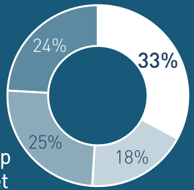
Travel horizon: June-November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



Destination not chosen

Trip fully booked

Destination chosen but trip not booked yet

Trip partially booked

POPULAR TRAVEL PERIODS

31%	33%	16%
June-July '22	August-September'22	October-November '22

TRAVEL PLANNING

WHERE TO?

51% ANOTHER EUROPEAN COUNTRY

33% WITHIN MY COUNTRY

11% OUTSIDE EUROPE

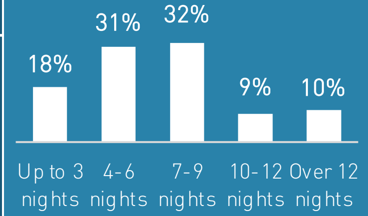
AND WITH WHOM?

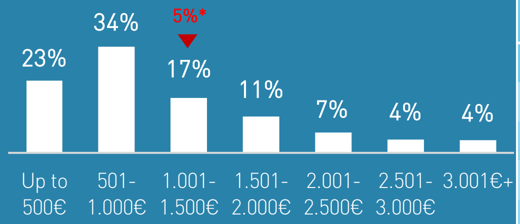
43% with family

35% with partner

9% solo

INTENDED LENGTH OF STAY AND BUDGET





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

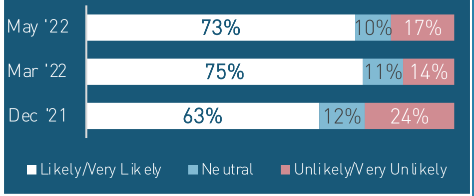
** Based on total sample, without reference to domestic trips

No. of respondents: 751 (total sample of respondents per country)

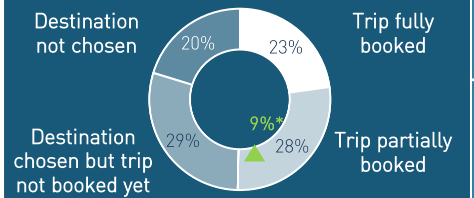
A SNAPSHOT OF FRENCH TRAVEL PLANS
Travel horizon: June-November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

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

TRAVEL PLANNING

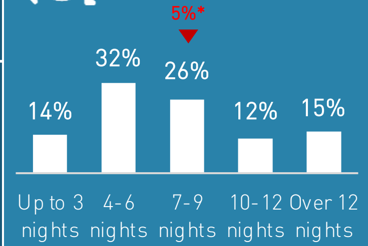
WHERE TO?

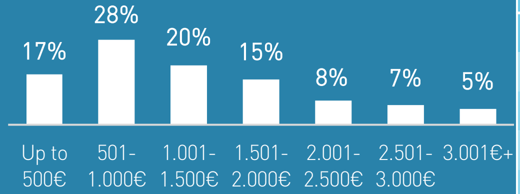
NEIGHBOURING COUNTRY	34%
NON-NEIGHBOURING COUNTRY	14%
WITHIN MY COUNTRY	37%
OUTSIDE EUROPE	11%

AND WITH WHOM?

8%* 37% with family	36% with partner	11% solo

INTENDED LENGTH OF STAY AND BUDGET





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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Culture & Heritage	19%
Sun & Beach	18% (5%*)
Coast & Sea	17%

TOP 5 EUROPEAN DESTINATIONS**

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

* 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 DUTCH TRAVEL PLANS

Travel horizon: June-November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '22	78% ▲ 7%*	13%	9%
Mar '22	71%	15%	14%
Dec '21	52%	16%	32%

TRAVEL READINESS

- Trip fully booked: 35% ▲ 9%*
- Trip partially booked: 20%
- Destination chosen but trip not booked yet: 27%
- Destination not chosen: 18%

POPULAR TRAVEL PERIODS

June-July '22	August-September'22	October-November '22
35%	43%	12%

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	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
15%	27%	25%	17%	16%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
13%	29% ▲ 8%*	21%	17%	9%	5%	6%

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

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

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '22	77% ▼ 8%*	10%	13%
Mar '22	85%	8%	8%
Dec '21	67%	16%	17%

TRAVEL READINESS

- Trip fully booked: 25%
- Trip partially booked: 17%
- Destination chosen but trip not booked yet: 40%
- Destination not chosen: 18%

POPULAR TRAVEL PERIODS

June-July '22	August-September'22	October-November '22
35%	44%	11%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 24%
- NON-NEIGHBOURING COUNTRY: 23%
- WITHIN MY COUNTRY: 45%
- OUTSIDE EUROPE: 6%

AND WITH WHOM?

- 38% with family
- 38% with partner
- 13% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
14% ▼ 5%*	47% ▲ 9%*	23%	9%	7%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
18%	29%	21%	15%	9%	5%	2%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Culture & Heritage: 28%
- Sun & Beach: 18%
- Coast & Sea: 13%

TOP 5 EUROPEAN DESTINATIONS**

France	16%
Spain	15%
Greece	9%
Germany	7%
Croatia	5%

* 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

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '22	73%	13%	14%
Mar '22	72%	13%	16%
Dec '21	56%	15%	29%

TRAVEL READINESS

- Trip fully booked: 36% (10%* ▲)
- Trip partially booked: 30%
- Destination chosen but trip not booked yet: 21%
- Destination not chosen: 13%

POPULAR TRAVEL PERIODS

June-July '22	August-September'22	October-November '22
42%	40%	9%

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	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
17%	27%	24%	16%	16%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
17%	27%	21% (6%* ▲)	12%	9%	8%	7%

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

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

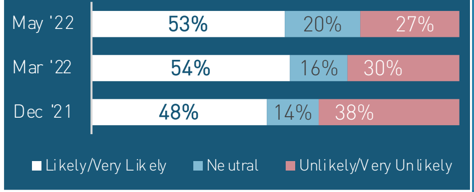
No. of respondents: 500 (total sample of respondents per country)

A SNAPSHOT OF SWISS TRAVEL PLANS

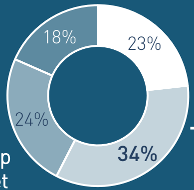
Travel horizon: June-November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

30%	33%	17%
June-July '22	August-September'22	October-November '22

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	29%
NON-NEIGHBOURING COUNTRY	23%
WITHIN MY COUNTRY	23%
OUTSIDE EUROPE	16%

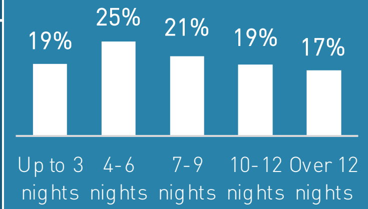
AND WITH WHOM?

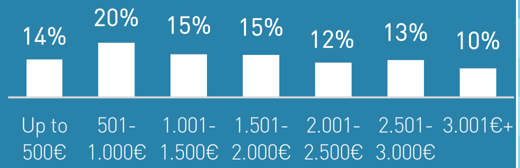
26% with family

22% with partner

17% solo

INTENDED LENGTH OF STAY AND BUDGET





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

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

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '22	79%	10%	12%
Mar '22	84%	9%	7%
Dec '21	76%	11%	14%

TRAVEL READINESS

- Destination not chosen: 16%
- Trip fully booked: 16%
- Trip partially booked: 15%
- **Destination chosen but trip not booked yet**: 52%

POPULAR TRAVEL PERIODS

June-July '22	August-September'22	October-November '22
25%	51%	13%

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

INTENDED LENGTH OF STAY AND BUDGET

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

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
16%	36% (▲ 7%*)	22%	13%	7%	4%	2%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break: 33%
- Sun & Beach: 15%
- Culture & Heritage: 15%

TOP 5 EUROPEAN DESTINATIONS**

France	20%
Italy	13%
Portugal	10%
Germany	7%
UK	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)

A SNAPSHOT OF POLISH TRAVEL PLANS

Travel horizon: June-November 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '22	87%	4%	10%
Mar '22	82%	5%	12%
Dec '21	80%	7%	13%

TRAVEL READINESS

Trip fully booked	21% (6%*)
Trip partially booked	21%
Destination chosen but trip not booked yet	40%
Destination not chosen	18%

POPULAR TRAVEL PERIODS

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

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	24%
NON-NEIGHBOURING COUNTRY	31%
WITHIN MY COUNTRY	34%
OUTSIDE EUROPE	6%

AND WITH WHOM?

with family	with partner	solo
46%	34%	9%

INTENDED LENGTH OF STAY AND BUDGET

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

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
20%	31%	19%	13%	10%	4%	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

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '22	65% ▼10%*	13%	22%
Mar '22	76%	12%	13%
Dec '21	57%	15%	28%

TRAVEL READINESS

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

POPULAR TRAVEL PERIODS

- 41% June-July '22
- 37% August-September'22
- 10% October-November '22

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 31%
- NON-NEIGHBOURING COUNTRY: 26%
- WITHIN MY COUNTRY: 26%
- OUTSIDE EUROPE: 10%

AND WITH WHOM?

- 30% with family
- 32% with partner
- 11% solo

INTENDED LENGTH OF STAY AND BUDGET

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

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
19%	29%	17%	12%	9%	7%	6%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach 21% ▲6%*
- 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

02

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%

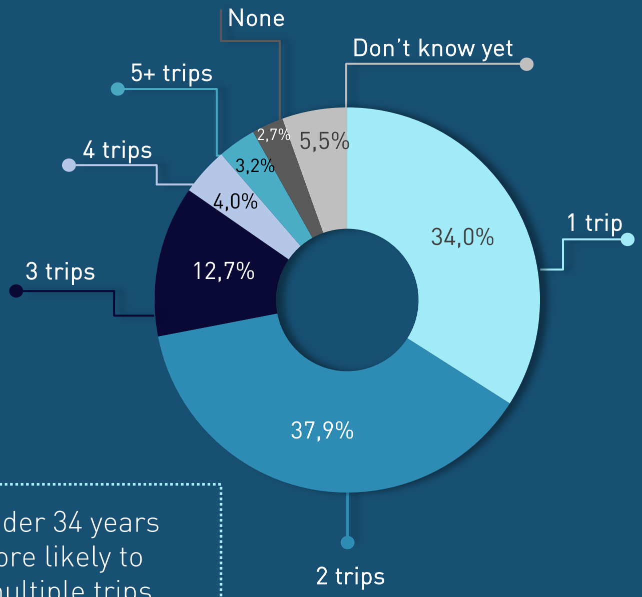
Belgium
59.4%

Switzerland
63.8%

Poland
53.8%

Germany
61.9%

Number of intended trips within Europe in the next 6 months



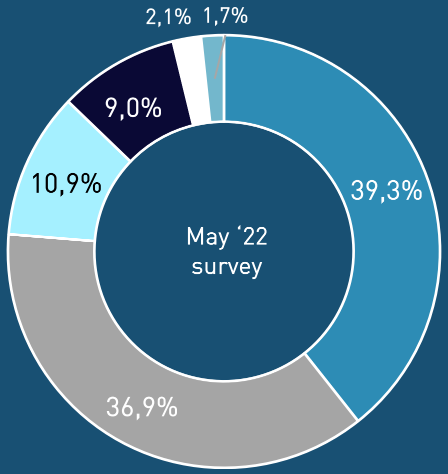
Travellers under 34 years of age are more likely to embark on multiple trips compared to their older counterparts (45+ years old)

No. of respondents: 4,391
* New question

Q10. How many trips do you plan to take in the next 6 months, within Europe?

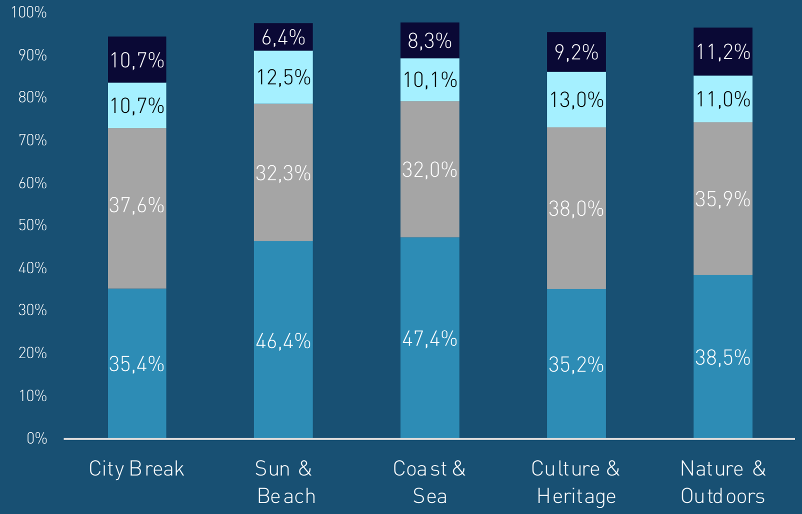
Family trips maintain the lead for the upcoming months, especially for seaside holidays, while travellers who plan City Breaks or Culture & Heritage prefer to travel with their partner

Preferred travel companion for respondents who are most likely to travel in the next 6 months



No. of respondents: 4,391

Preferred travel companion (top 4) vs preferred type of holiday



May '22 survey

No. of respondents: 6,005

Q17. With whom are you most likely to travel during your next trip within Europe?

* Statistically significant difference vs previous survey period

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%

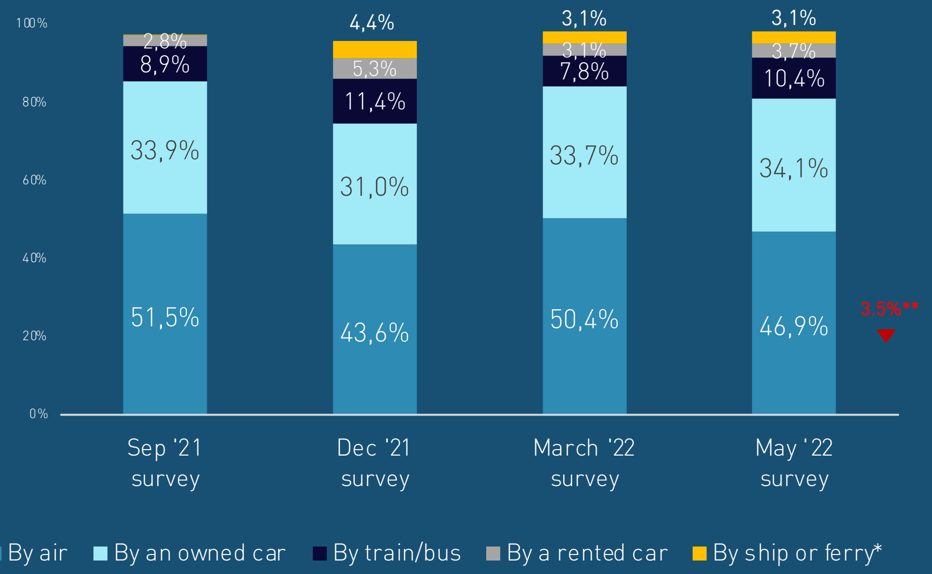
Poland
49.5%

UK
63.1%
8.7%*

France
46.2%

Italy
57.3%

Preferred modes of transport for respondents most likely to travel in the next 6 months



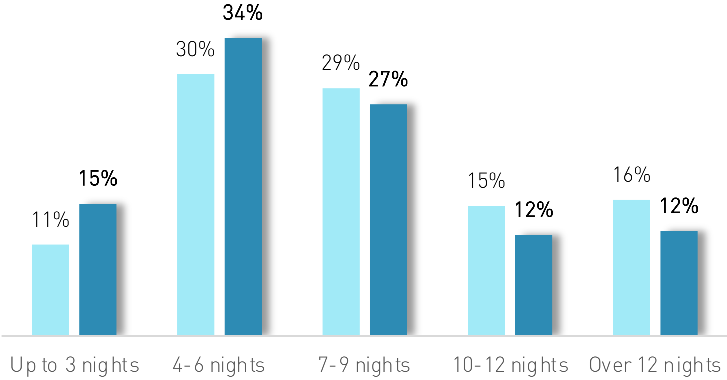
*Up to September '21. 'By ship or ferry' were included in 'Other'
**Statistically significant difference vs previous survey period

No. of respondents: 4,391

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

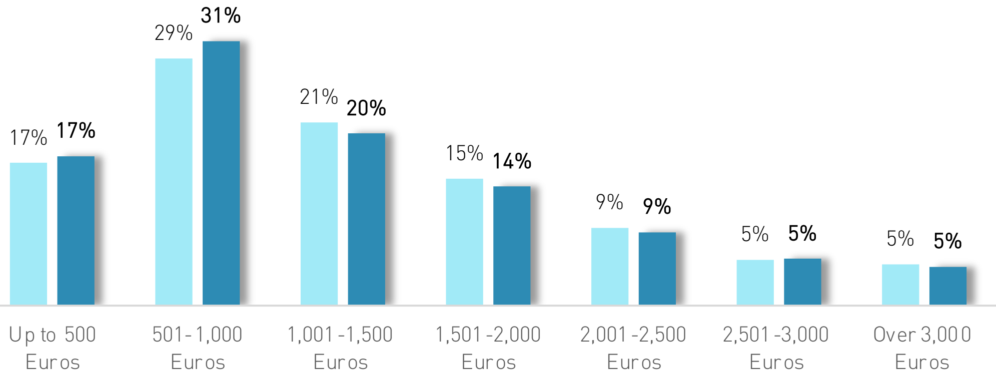
The most popular length of stay for trips this summer is 4-9 nights

Intended length of stay (nights)



Envisaged budget

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



May'21 survey   May'22 survey

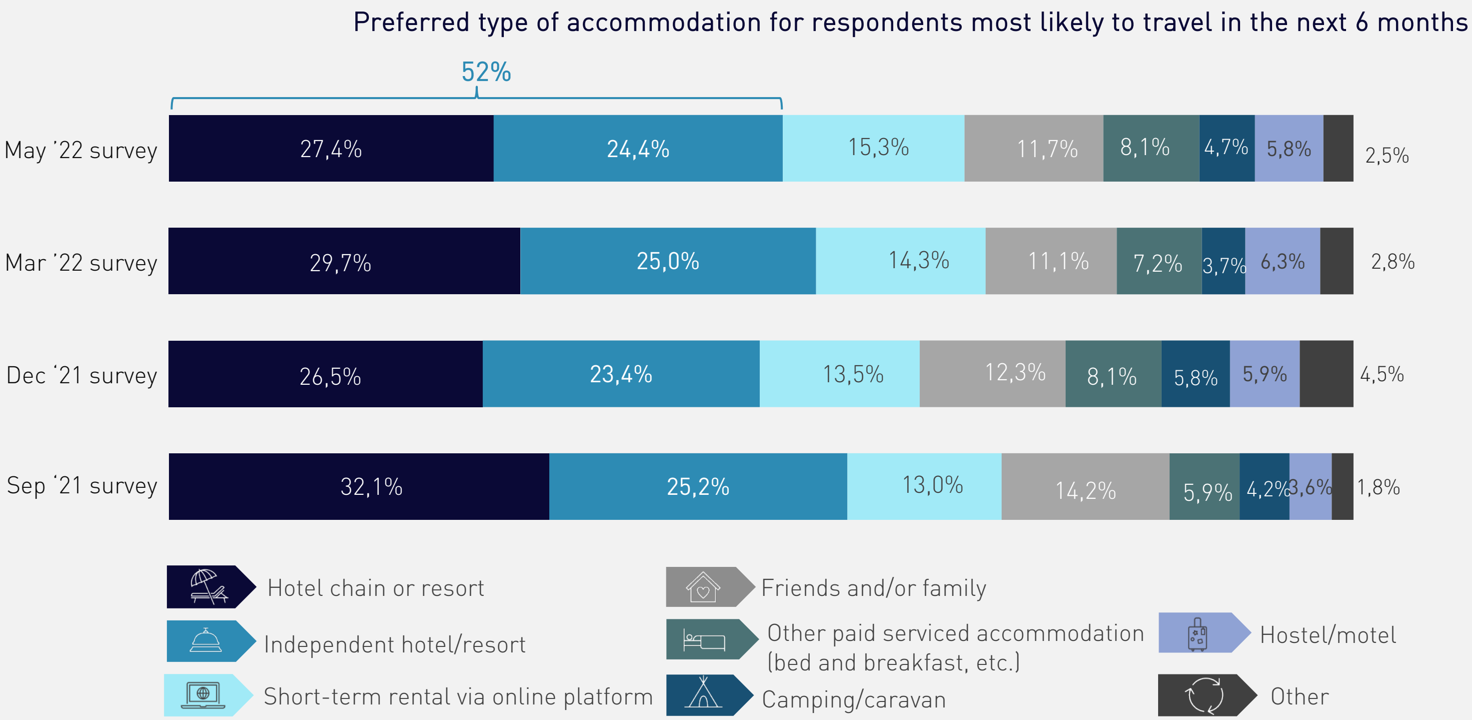
32% of Sun & Beach holiday makers will stay for 7-9 nights, whereas Nature & Outdoors and City Break travellers prefer shorter trips, up to 6 nights

Europeans planning Cruise, Culture & Heritage or Sun & Beach trips are more likely to spend 1,000-2,000 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

Over half of travel-ready Europeans favour hotel stays



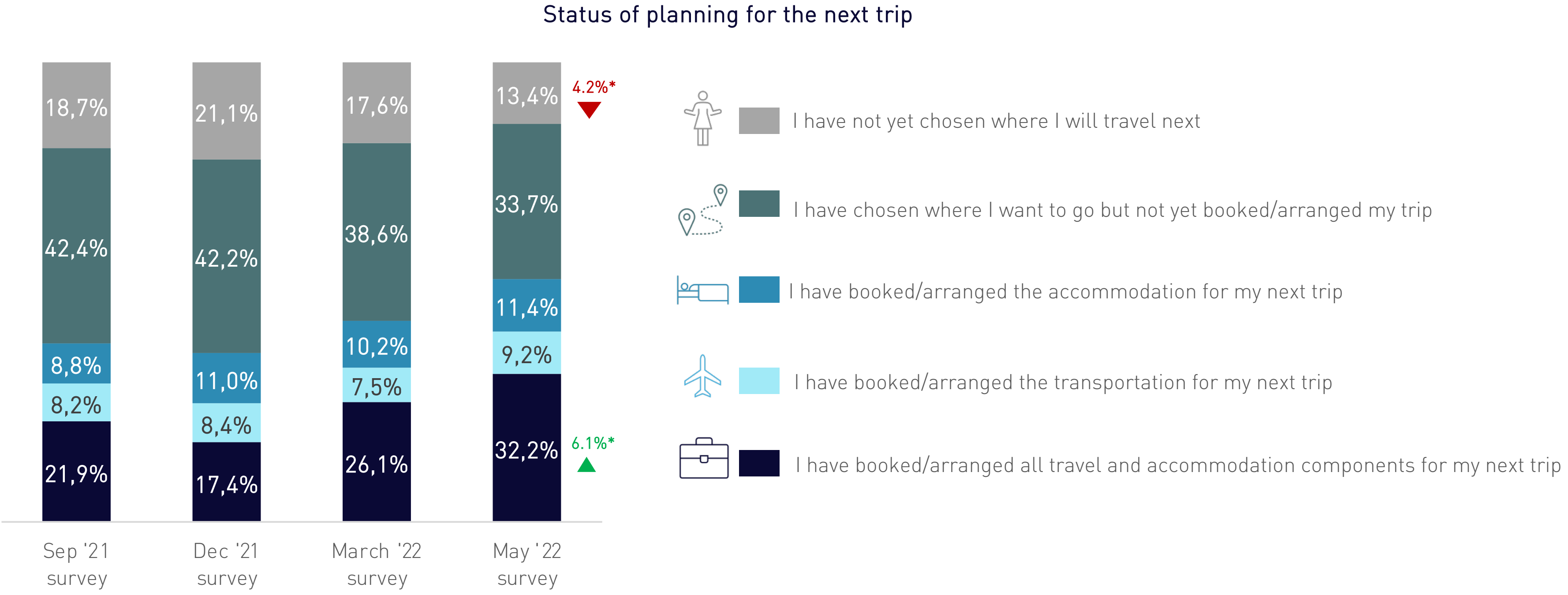
52% of guests in short-term rentals will spend up to 1,000 euros on their next trip, compared to 41% among those staying at chain hotels or at resorts

*Statistically significant difference vs previous survey period

Q16. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

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%)

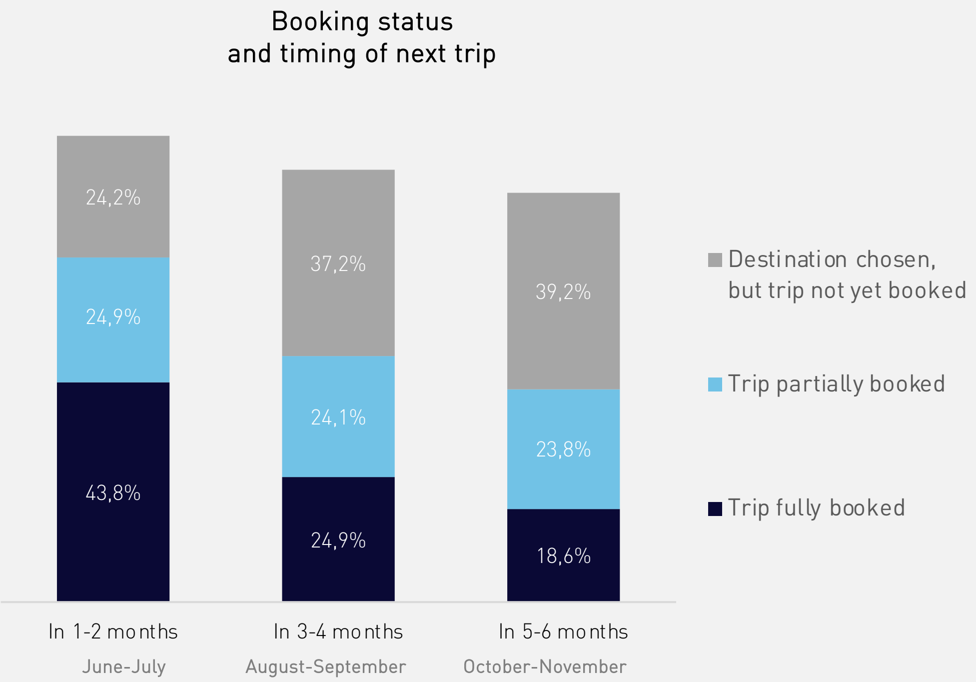


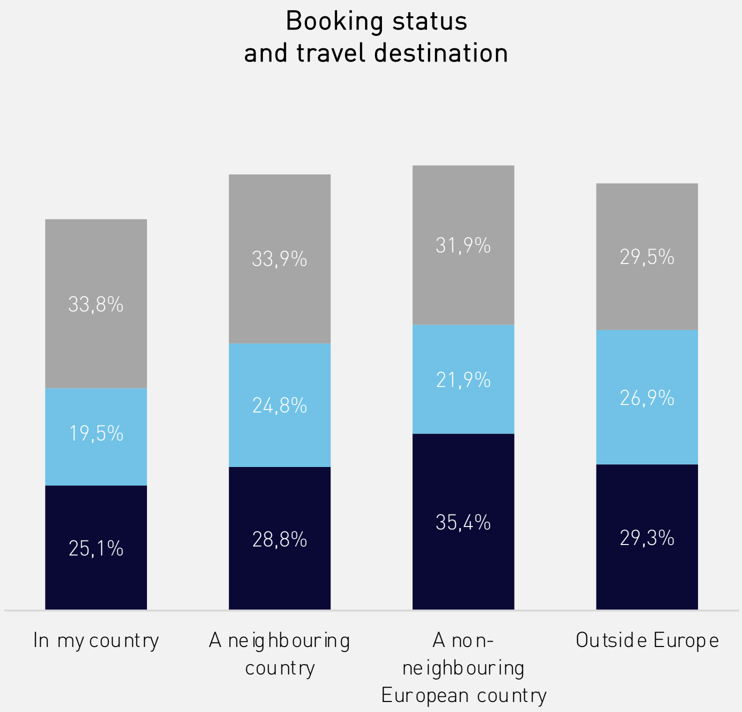
Q21. Please select a response which best describes the planning for your next trip:

* Statistically significant difference vs previous survey period

No. of respondents: 4,606

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





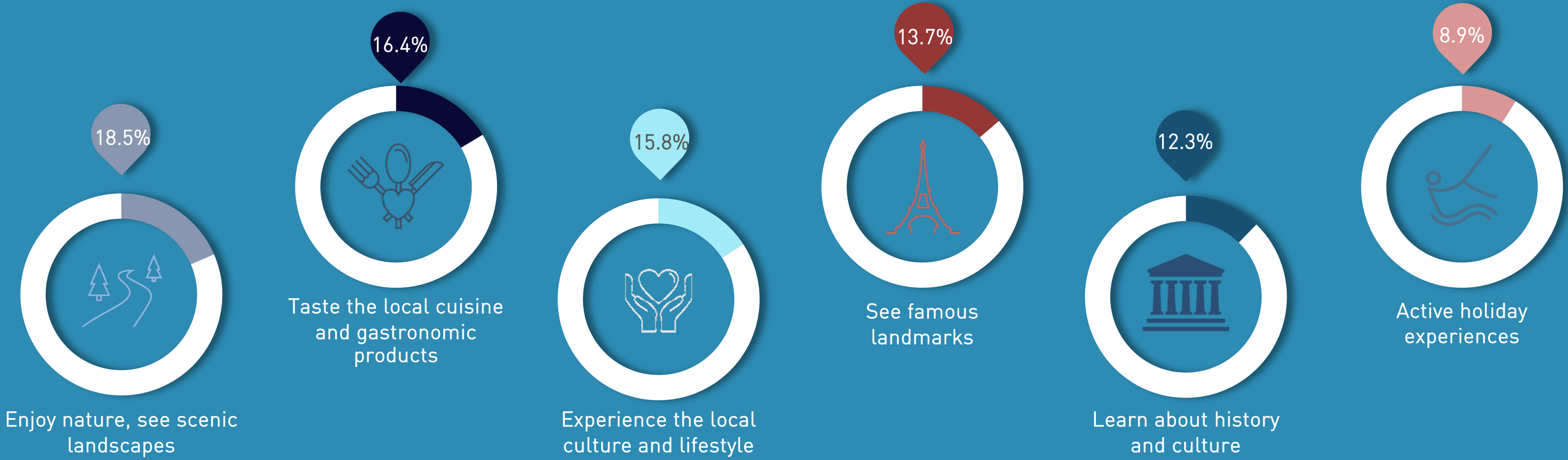
May '22 survey

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

No. of respondents: 6,005

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

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



May '22 survey

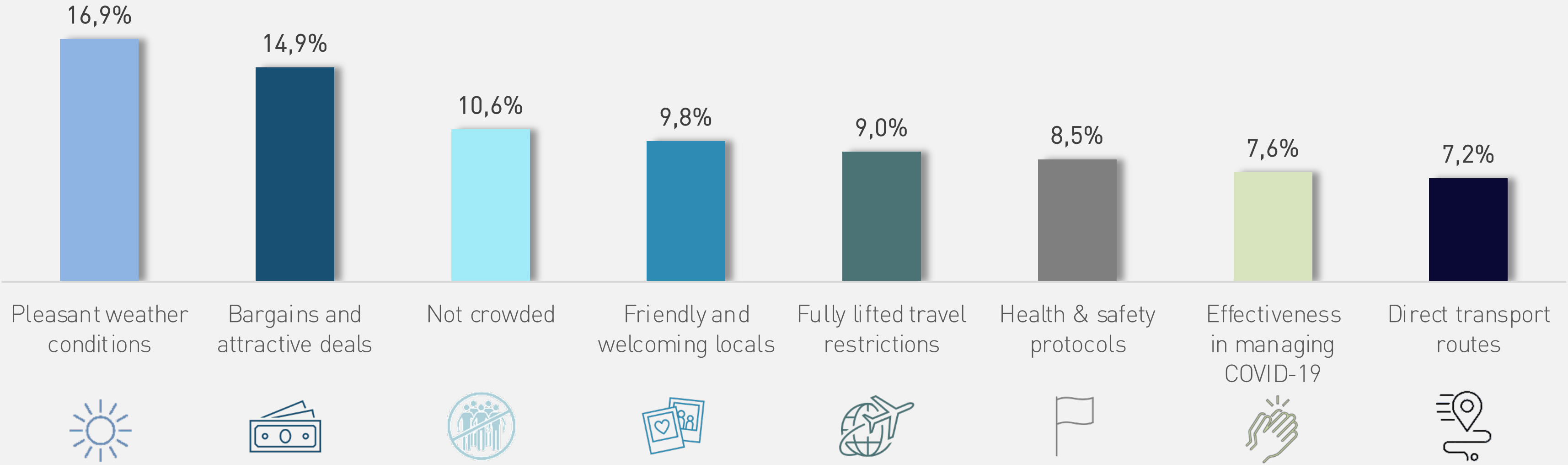
Q8. Which of the following travel experiences will you look for during your next trip in Europe?

* New question

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



May '22 survey

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

* New question

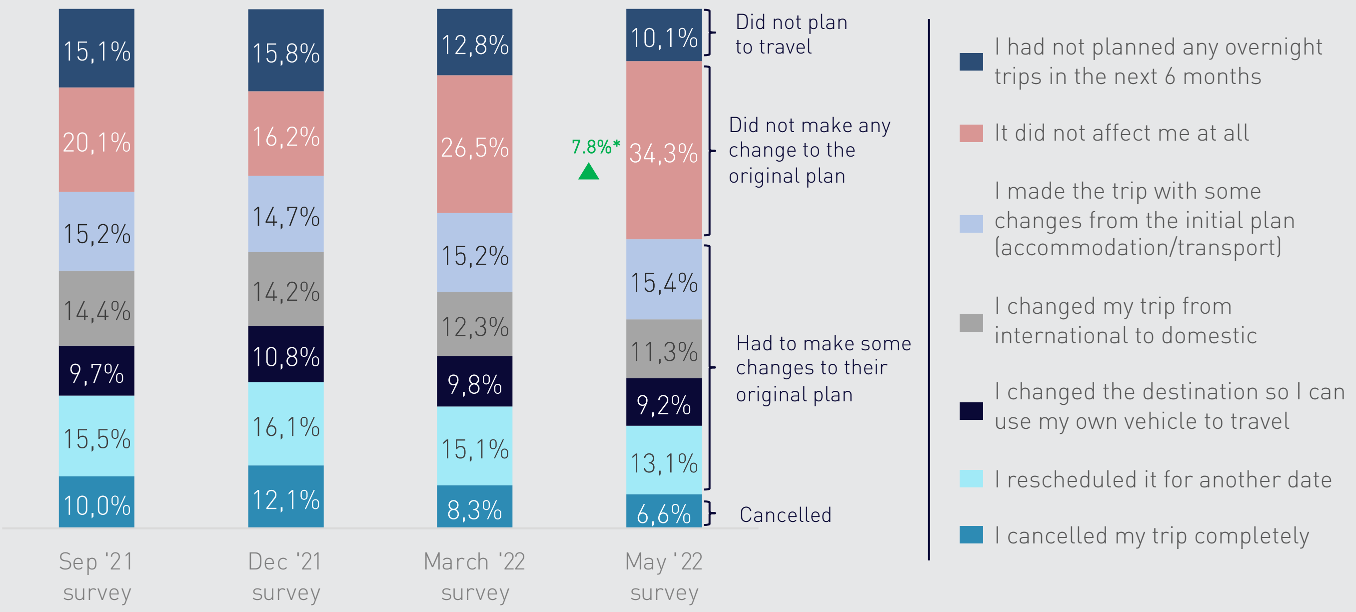
No. of respondents: 6,005

TRAVEL CONCERNS

03

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?



Top 5 markets choosing domestic over international travel

Italy 17.3%

Poland 14.7%

Spain 13.9%

Austria 12.4%

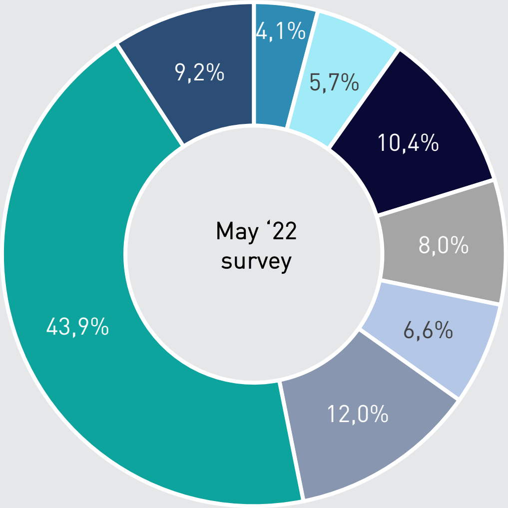
Germany 12.3%

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

* Statistically significant difference vs previous survey period
No. of respondents: 6,005

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
- It did not affect me at all
- I will wait and see how the war evolves before booking a trip
- I made the trip with some changes from the initial plan (accommodation/ transport)
- I changed my trip from international to domestic
- I changed my itinerary to avoid countries neighbouring the conflict zone
- I rescheduled it for another date
- I cancelled my trip completely

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%

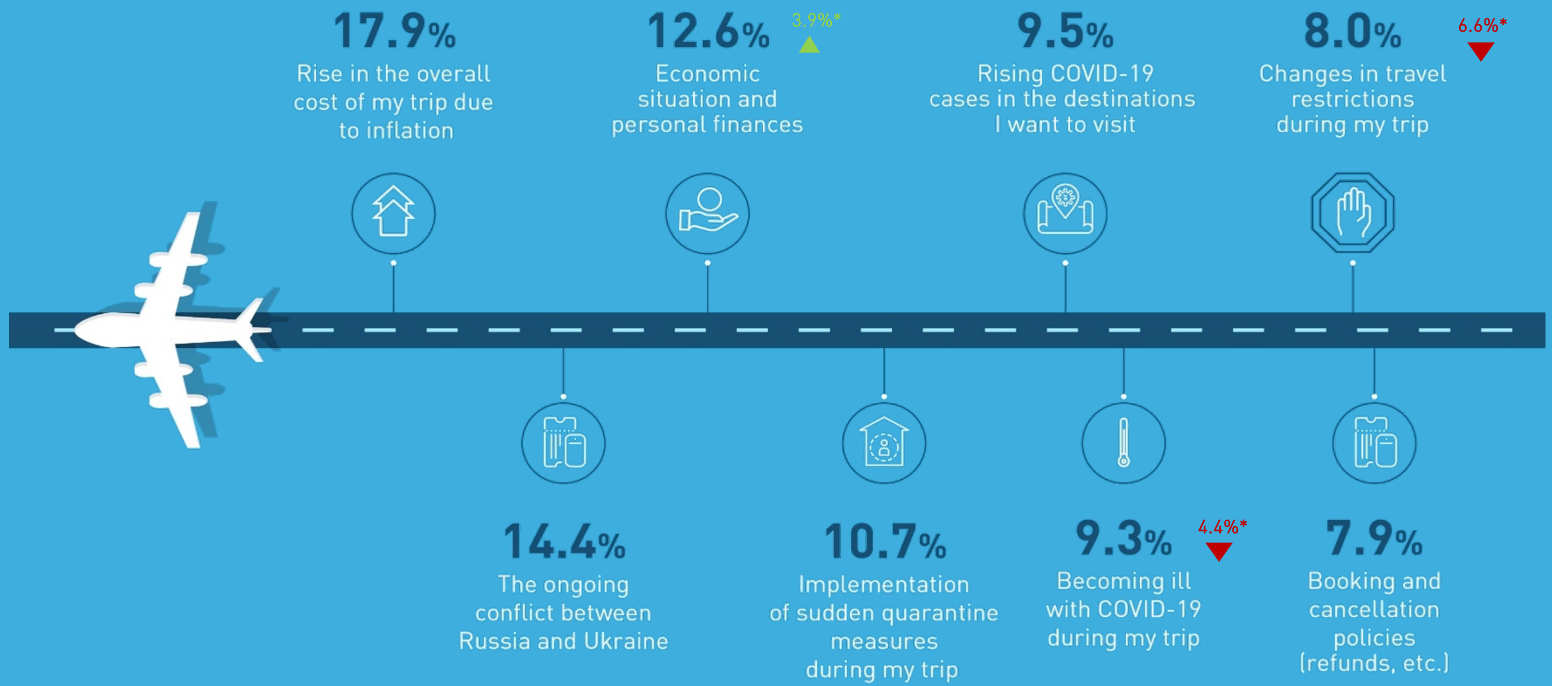
Q3. How has the ongoing war between Russia and Ukraine affected your plans to travel within Europe in the next 6 months?

* New question

No. of respondents: 6,005

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

Leading concerns for those who are most likely to travel next

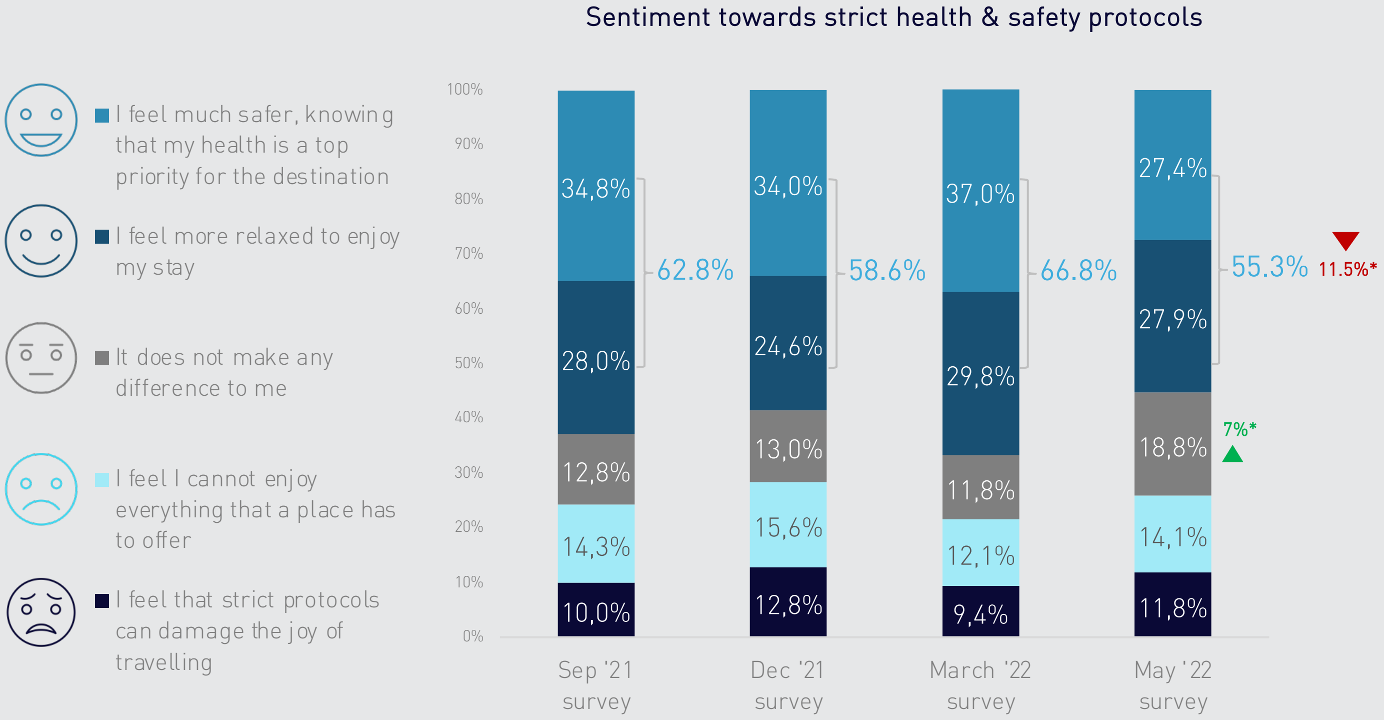


May '22 survey

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.

No. of respondents: 4,391

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

Q7. Please select a response which describes you the most:
"When I travel to places with strict health and safety protocols..."

METHODOLOGICAL ANNEX

04

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:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	80	96	93	56	106	119	112	868
	25 - 34	135	112	74	159	129	153	107	128	173	151	1,321
	35 - 44	126	135	101	139	141	150	120	111	133	111	1,267
	45 - 54	139	167	105	65	146	168	94	98	52	57	1,091
	≥55	263	263	175	57	238	187	125	57	23	70	1,458
Total		**751**	**750**	**500**	**500**	**750**	**751**	**502**	**500**	**500**	**501**	**6,005**

Study on Monitoring Sentiment for Intra-European Travel

Data sources: This report is based on research conducted by MINDHAUS (www.mindhaus.gr) and should be interpreted by users according to their needs.

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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