



MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 13 | 10/22

**EUROPEAN
TRAVEL
COMMISSION**



Co-funded by the
European Union

WAVE 13

RESEARCH HIGHLIGHTS



This report monitors sentiment and short-term intentions for domestic and intra-European travel and is the **13th wave of market research**¹ initiated in September 2020. Results are based on data collected in September 2022 from Europeans in 10 high-volume source markets.

- Positive travel sentiment continues; **70% of Europeans plan to travel in the next six months** (+4% compared to September 2021); **75% of Europeans aged 45-54 are eager to take a trip over the next six months**, compared to 58% among Europeans aged 18-24.
- **Over half of respondents (52%) plan to travel at least twice in the next six months** (-6% compared to May 2022), while the share of those planning only one trip (41%) has increased by 7% over the same period.
- **62% of Europeans intending to travel will visit another European country** - the highest level recorded since September 2020 and a 7% increase compared to a year ago.
- Europeans' greatest travel desires are to **enjoy nature** (18%), **taste the local cuisine** (17%) and **experience the local culture** (16%).

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RESEARCH HIGHLIGHTS



- **Leisure trips remain the leading travel choice (72%),** while only 5% of respondents plan a business trip.
- **Most often, Europeans prefer travelling with a partner (38%) or family (37%).**
- Despite operational difficulties during the summer, **air travel is still the preferred transportation mode for over half of travel-ready Europeans (51%),** while preference for train/bus travel (12%) has grown by 3% compared to September 2021.
- **63% of Europeans are planning trips of up to six nights.** Travellers' **most common budget remains at 500-1,000 euros (32%),** while the share of Europeans planning to spend up to 500 euros (21%) is up by 4% compared to May 2022.
- **The share of Europeans who have fully/partly booked their trip (45%) drops by 8%.** This decline is a trend reversal from previous research waves and can potentially be explained by increased economic concerns leading to a desire for last-minute bookings.
- **City Breaks (20%) are now Europeans' most preferred type of leisure trip,** while interest in Sun & Beach holidays (14%) drops — similar to September 2021.
- **Good weather (18%), attractive deals (17%) and less crowded places (11%)** remain Europeans' leading criteria for selecting a travel destination.

WAVE 13

RESEARCH HIGHLIGHTS

- **Financial issues are the leading concern for 2 in 5 Europeans (+10% since May 2022):** 23% of respondents are concerned by the rising travel costs and 17% by personal finances.
- **Only 9% of travel-ready Europeans are concerned by the war in Ukraine (-6%, compared to May 2022),** while the war has had no effect on the travel plans of 52% of respondents (+8% compared to May 2022).
- **The effect of COVID-19 on Europeans' travel behaviour drops to its lowest point since September 2020:** 41% of respondents report no change in their travel plans due to the pandemic (+7% compared to May 2022 and +21% compared to September 2021).



WAVE 13

RECOMMENDATIONS FOR DESTINATIONS



- The coming months are a prime time for City Breaks. Therefore, **campaigns for urban destinations should highlight famous landmarks and the local culture, lifestyles, cuisine and gastronomy.**
- Although interest in domestic travel declines, destinations relying on the local markets can **focus on audiences and activities with an above-average interest in domestic trips. These are usually Europeans over the age of 55 (36%); and travellers interested in Nature and the Outdoors (35%), Wellness and Relaxation (32%) and Culture and Heritage (31%) experiences.**
- **Destinations can also promote their accessibility by public transportation,** as the preferences for travelling by train or bus strengthen, especially among travellers aged 18-24 (17%) and travellers with a budget of under 500 Euros (17%).
- Although less than previously, over 30% of Europeans are still concerned about COVID-19 issues, thus **destinations should maintain and carefully promote their safe-destination measures.**

WAVE 13

RECOMMENDATIONS FOR BUSINESSES



- Hotels are the leading accommodation choice for City Break travellers; **urban hotels could target Europeans travelling with their partner** (39%), offering short vacations of 4-6 nights (45%) and romantic getaways of up to 3 nights (37%).
- As a response to the surge in concerns over inflation and personal finances and their effect on bookings, businesses can **offer bargains and attractive deals in order to boost bookings and pull consumers through the sales funnel**.
- Businesses catering for **Gen Z travellers** (aged 18-24) **should offer experiences for groups of friends** (1 in 3 trips), looking to explore famous local landmarks, enjoy scenic landscapes and taste the local cuisine.
- **Cultural attractions and heritage sites should target baby boomers** (aged over 55), as they demonstrate the highest level of interest in such attractions; these travellers also tend to travel with their partner to a greater extent (52%) and put increased emphasis on strict health & safety protocols (63%).



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How to read

Wave 13

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

	Wave 9	Wave 10	Wave 11	Wave 12	Wave 13
Survey dates	10-18 Sep '21	23-31 Dec '21	1-9 March '22	9-12 May '22	13-23 Sept '22

2. To present Wave 13 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: October - November 2022
 - In 3-4 months: December 2022 - January 2023
 - In 5-6 months: February - March 2023
3. To present data and insights, the following distinct groups have been analysed:
 - Total respondents: 5,988
 - Respondents most likely to travel in the next 6 months: 4,199
 - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,467
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

Europeans' travel intentions remain strong, growing by 4% compared to the September 2021 survey

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



Poland

84.6%

▲ 13%



Spain

74.7%



Belgium

73.0%



Italy

71.6%

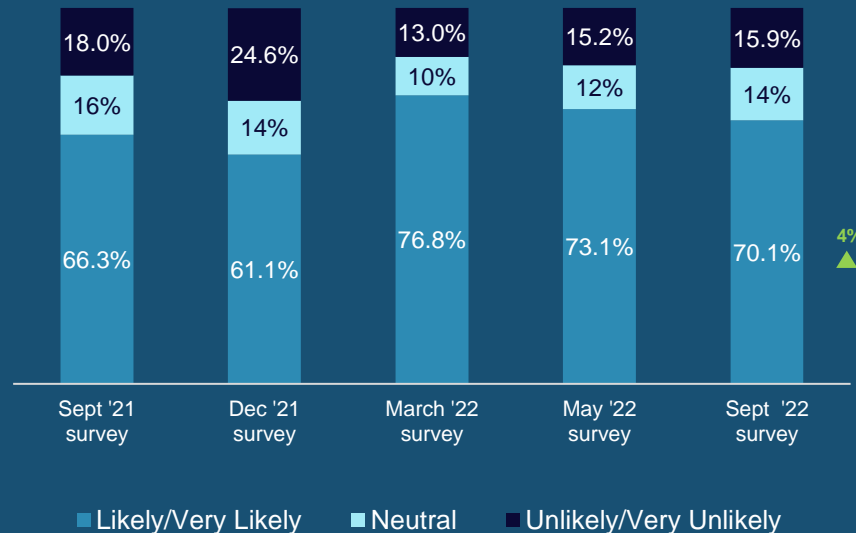
▲ 3%



UK

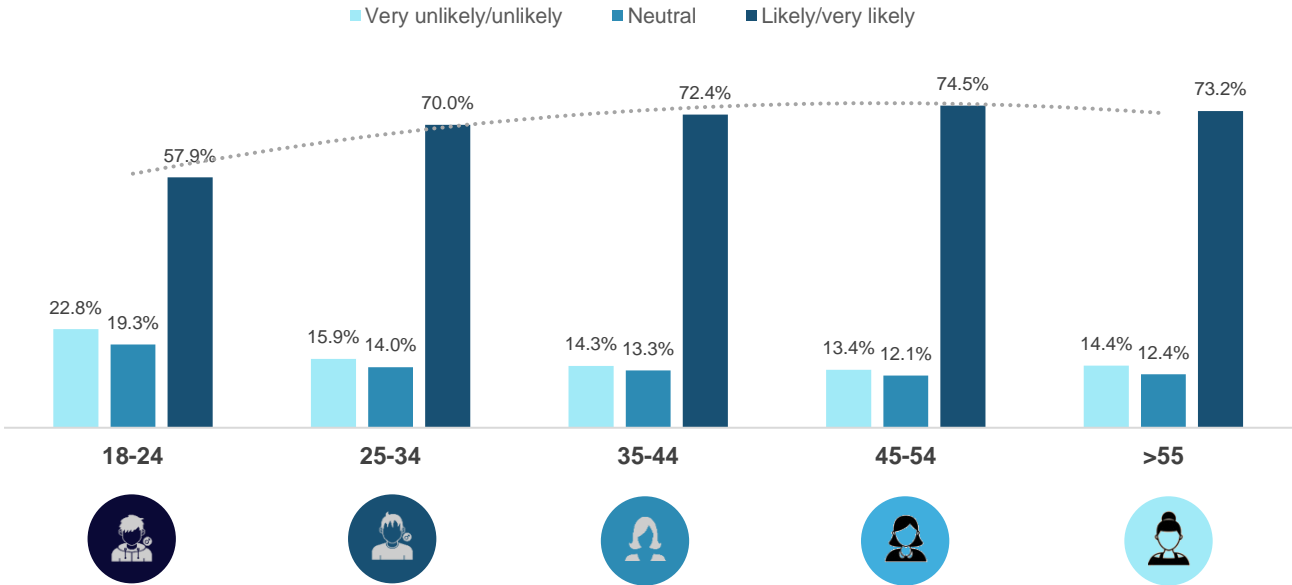
71.2%

Intention to travel in the next 6 months



Europeans over the age of 35 maintain the highest travel intentions, while Gen Z Europeans (aged 18-24) continue to be the most hesitant to travel

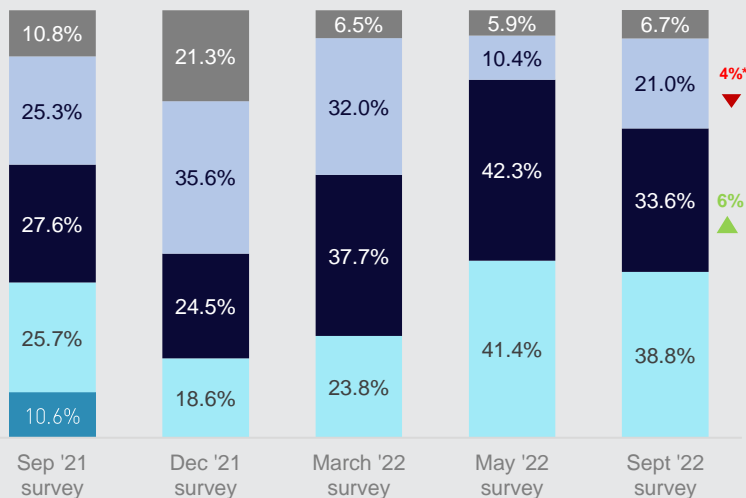
Intention to travel in the next 6 months by age group



26% of senior Europeans (55+ years old) consider crowding at destinations as an essential criterion when choosing a holiday spot. At the same time, only 15% of the younger travellers (18-24 years old) seem to think about it.

2 in 5 Europeans plan to travel between October-November 2022 and interest in intra-European travel surges by 7% compared to September 2021

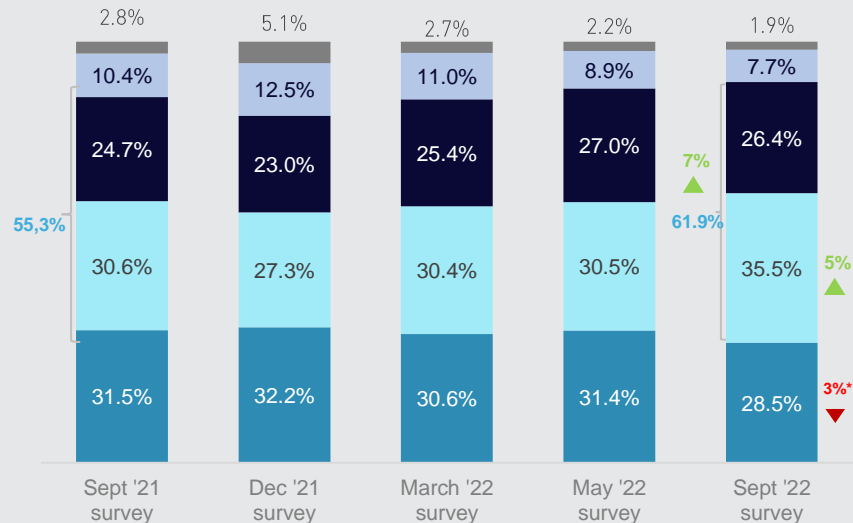
When will Europeans travel next?



■ This month* ■ In 1-2 months ■ In 3-4 months
 ■ In 5-6 months ■ Do not know yet

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?



■ Within my country ■ To a non-neighbouring European country ■ To a neighbouring country
 ■ To destinations outside Europe ■ Do not know yet

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

PREFERRED COUNTRIES FOR EUROPEANS' NEXT INTERNATIONAL TRIP

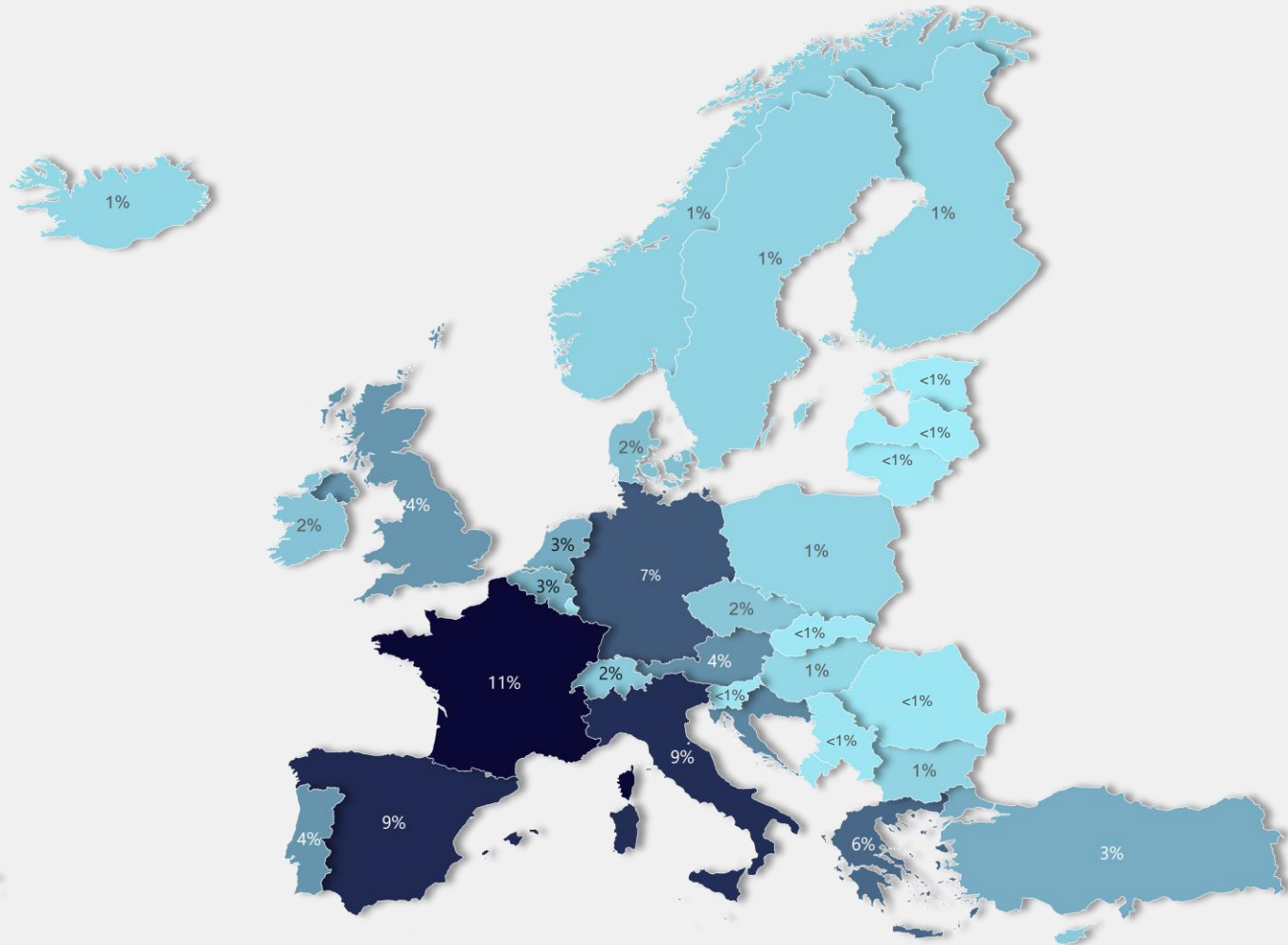
As autumn arrives, Germany
climbs to 4th place, leaving
Croatia outside the top-5 list

TOP 10 COUNTRIES

France	10.9%
Spain	9.3%
Italy	9.1%
Germany	7.0%
Greece	6.4%
Croatia	4.9%
Austria	4.4%
Portugal	4.2%
UK	4.2%
Netherlands	3.2%

*Please use this map as a reference only

No. of respondents: 4,467



* No statistically significant differences between waves were recorded

Although summer has ended, Europeans' preference for leisure travel remains strong



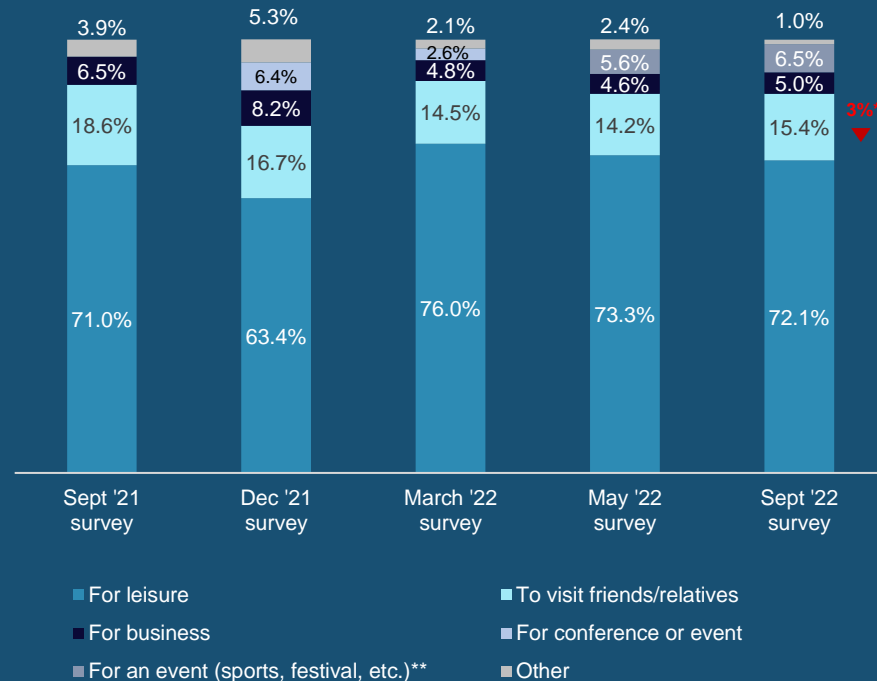
Top 3 markets to take a leisure trip



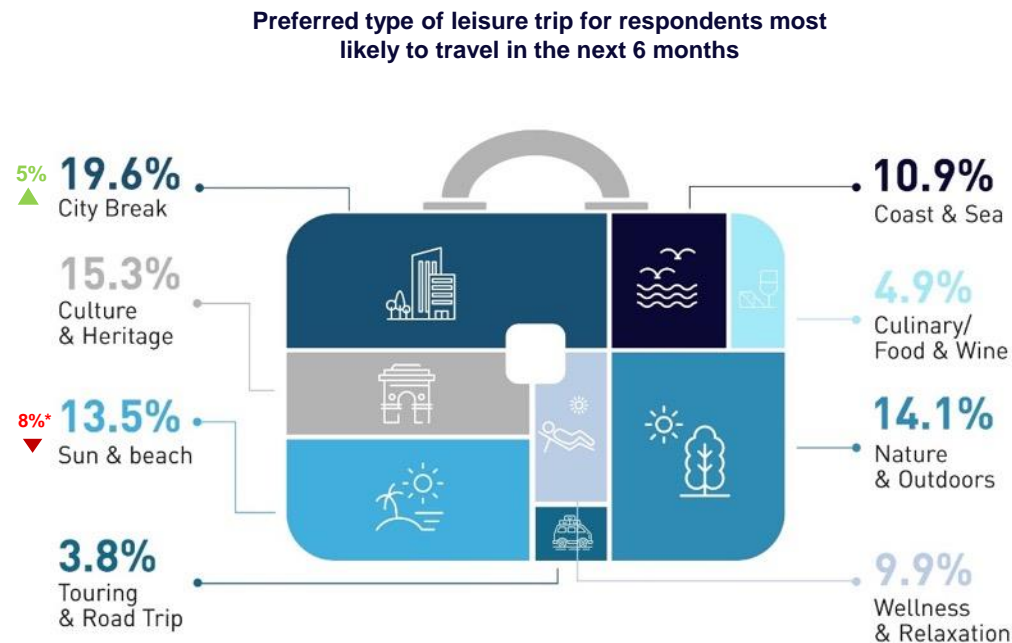
Top 3 markets to take a business trip



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



Travel preferences change according to the season: demand for City Breaks surges (+5%), while Sun & Beach drops by 8% compared to May 2022



Sept '22 survey

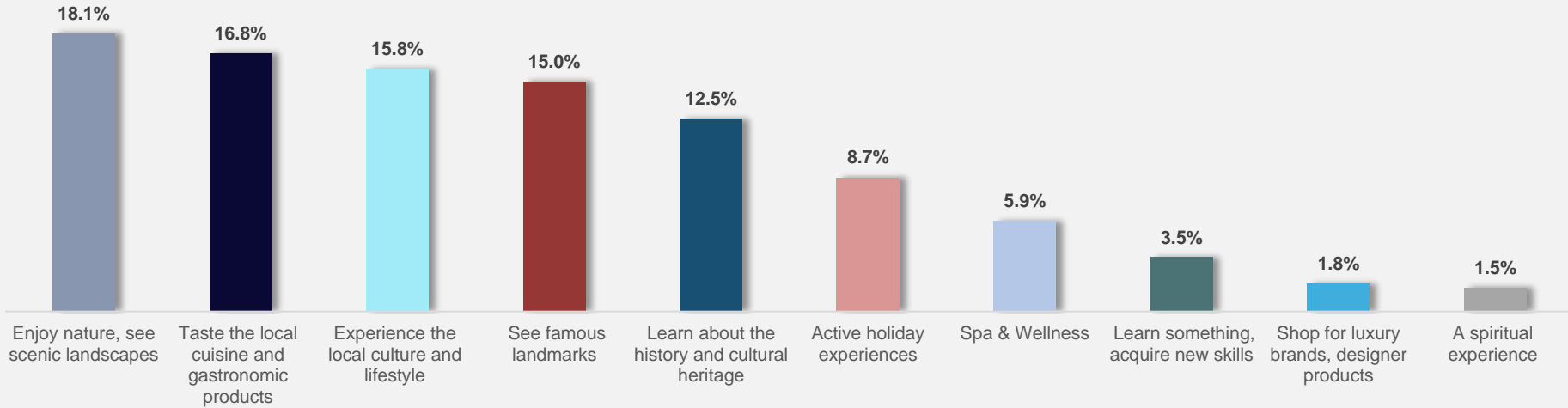
'Coast & Sea' and 'Sun & Beach' holidays are separated in this survey because some destinations such as the Netherlands, Denmark, the Baltic countries, etc., offer coast & sea experiences and sports (e.g. sailing) but they are not necessarily associated with sun & beach vacations and experiences as in Spain, Italy, Greece, etc.



Domestic travel is particularly popular among Europeans planning a leisure trip focused on Nature and the Outdoors (35%), Wellness and Relaxation (32%) and Culture and Heritage (31%).

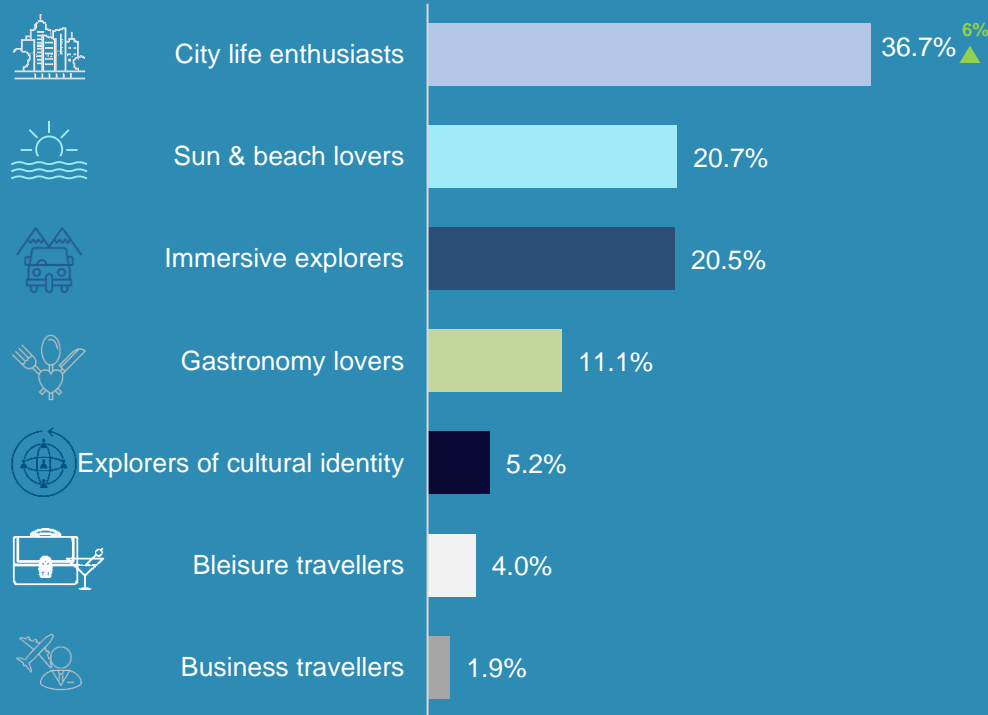
Europeans' greatest desires are to enjoy nature, taste the local cuisine and connect with the host community

The top 3 experiences for City Break travellers are: seeing famous landmarks, experiencing the local culture, and enjoying the local cuisine



Sept '22 survey

WHAT TRAVELLER STYLES DO EUROPEANS MAINLY ENDORSE?



- **37% of 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 remain the other two big travel segments** among Europeans planning to travel in the coming months.

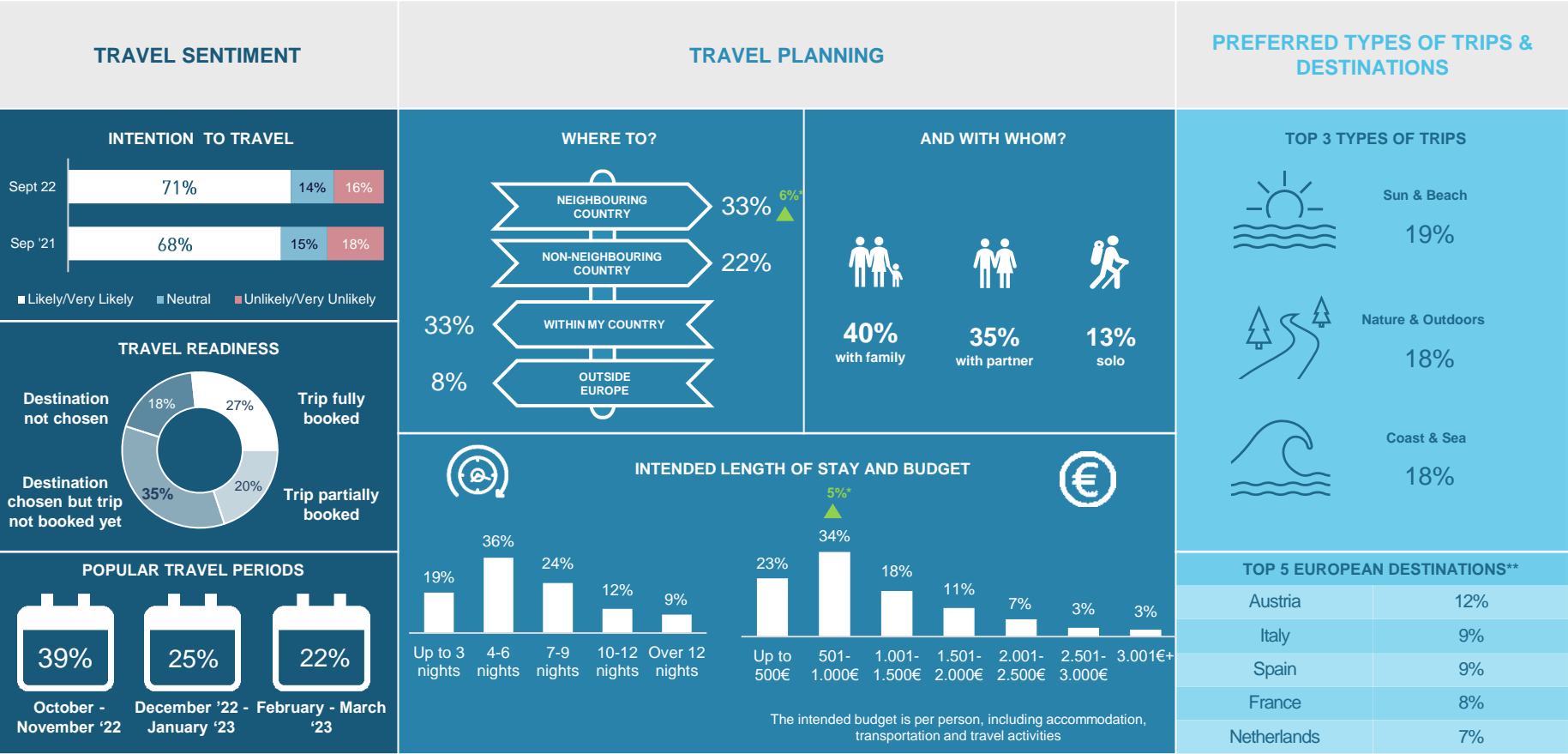
The travel style reveals the true interest of travellers, regardless of the season or destination.

It should be considered by destinations and tourism products and service developers as it can help optimise the travel experience.

* Statistically significant difference vs previous survey period
No. of respondents: 4,199

A SNAPSHOT OF GERMAN TRAVEL PLANS

Travel horizon: October 2022-March 2023



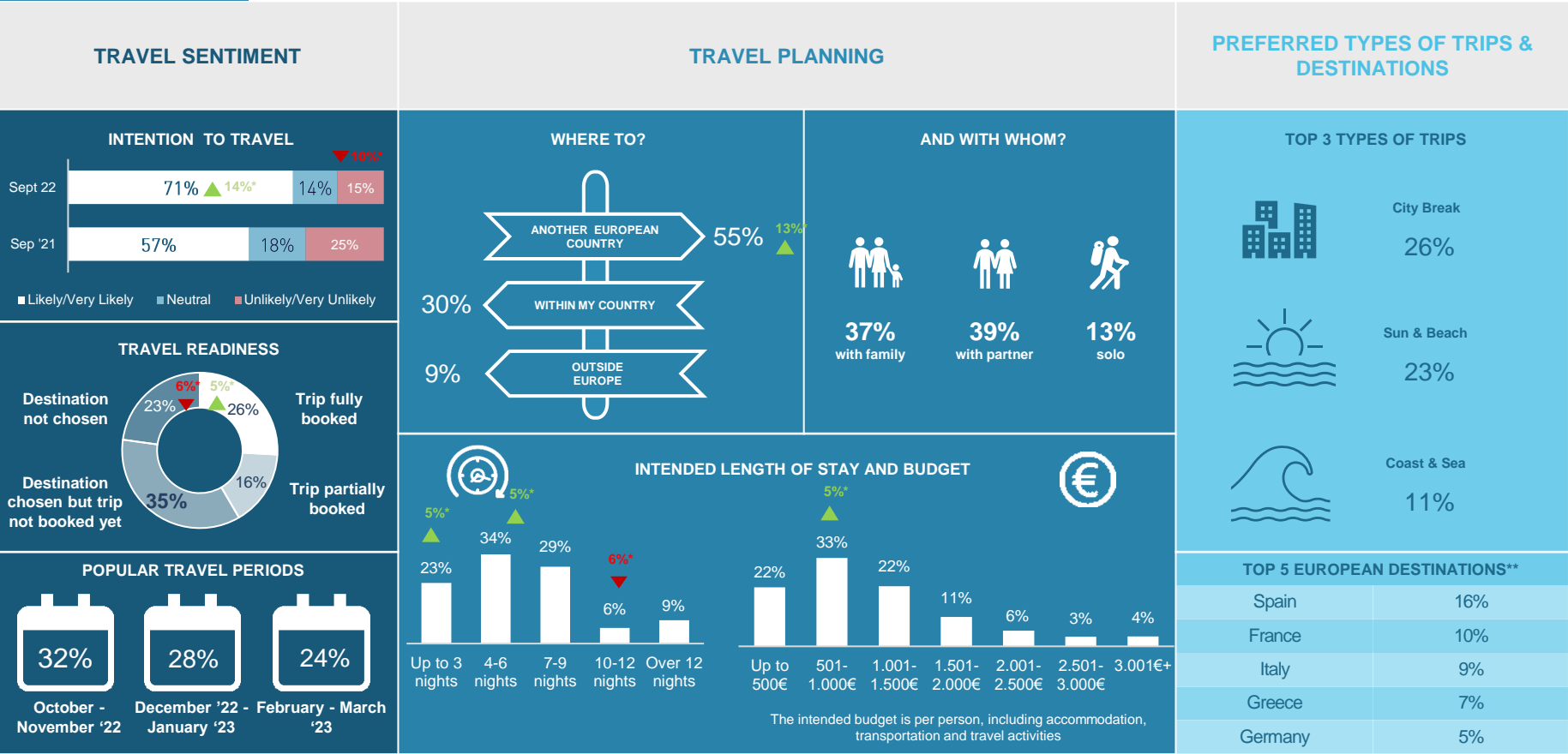
* Significant increase▲ or decrease▼ vs the same time last year

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

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

A SNAPSHOT OF BRITISH TRAVEL PLANS

Travel horizon: October 2022-March 2023



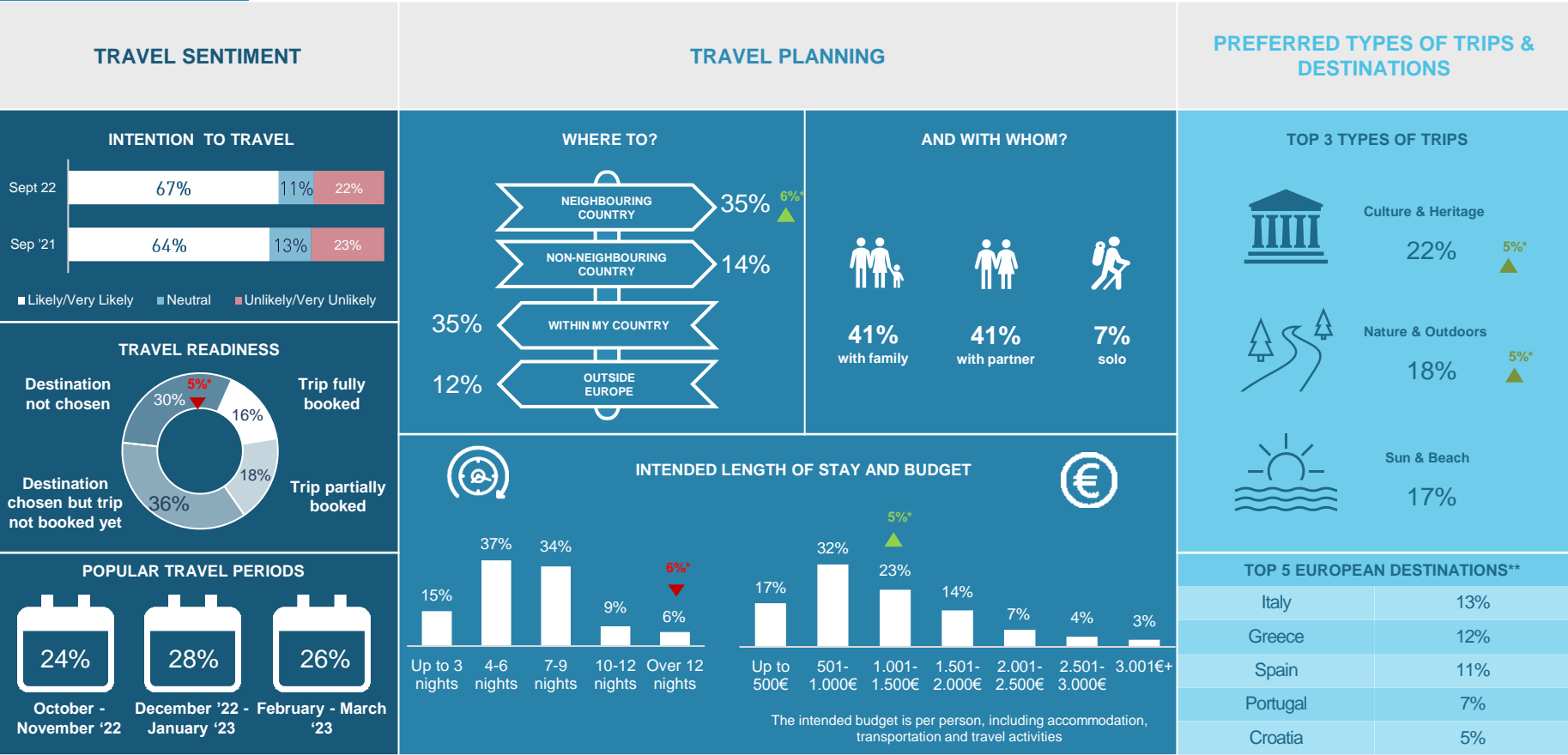
* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

A SNAPSHOT OF FRENCH TRAVEL PLANS

Travel horizon: October 2022-March 2023



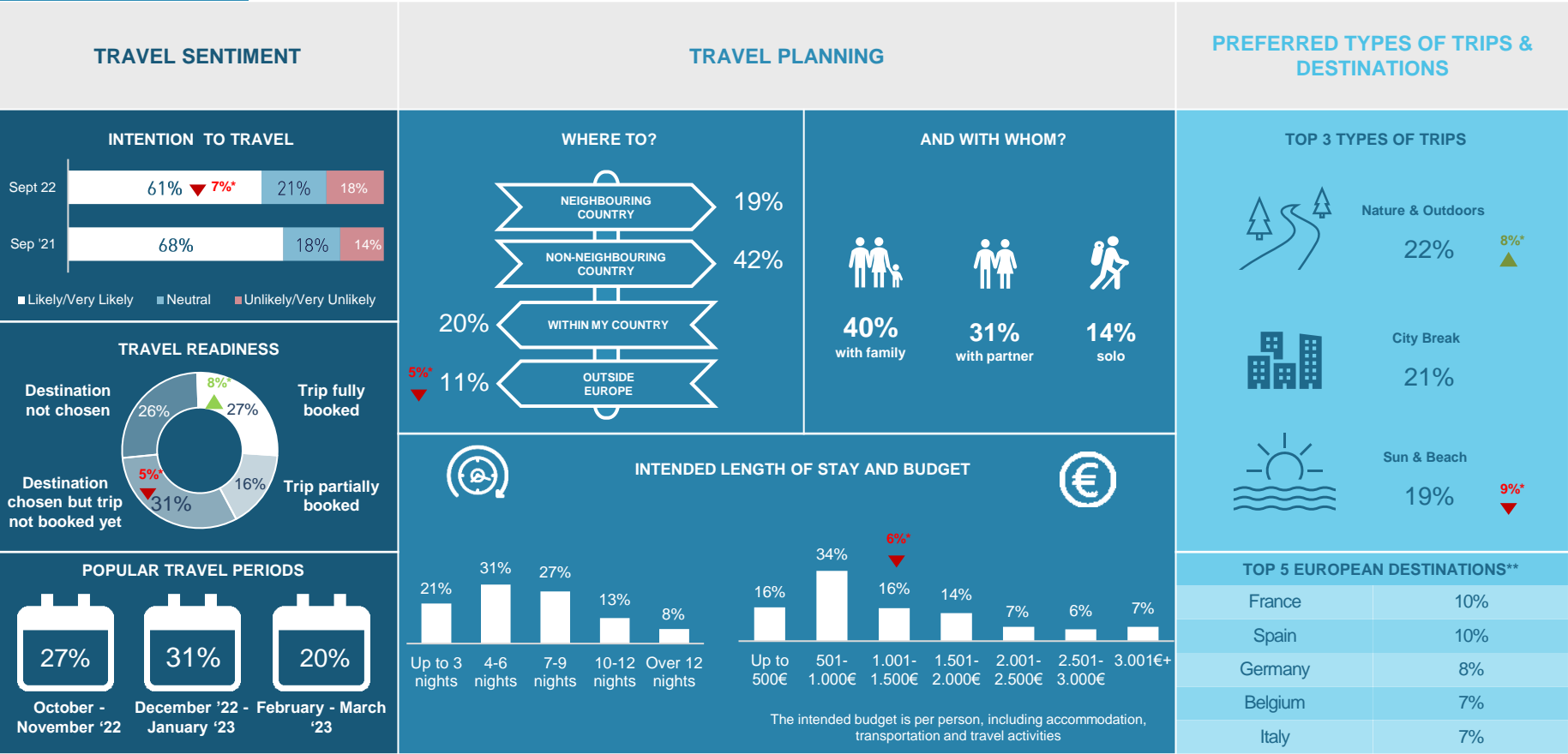
* Significant increase▲ or decrease▼ vs the same time last year

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

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

A SNAPSHOT OF DUTCH TRAVEL PLANS

Travel horizon: October 2022-March 2023



* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

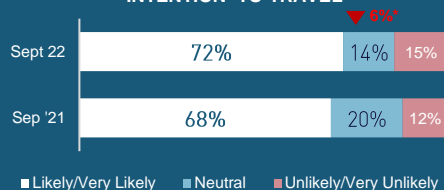
A SNAPSHOT OF ITALIAN TRAVEL PLANS

Travel horizon: October 2022-March 2023

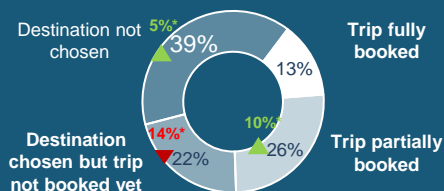


TRAVEL SENTIMENT

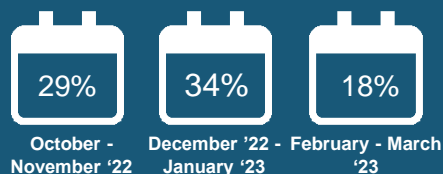
INTENTION TO TRAVEL



TRAVEL READINESS

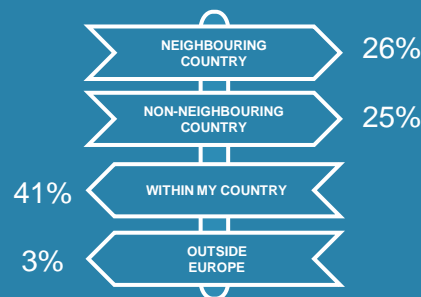


POPULAR TRAVEL PERIODS



TRAVEL PLANNING

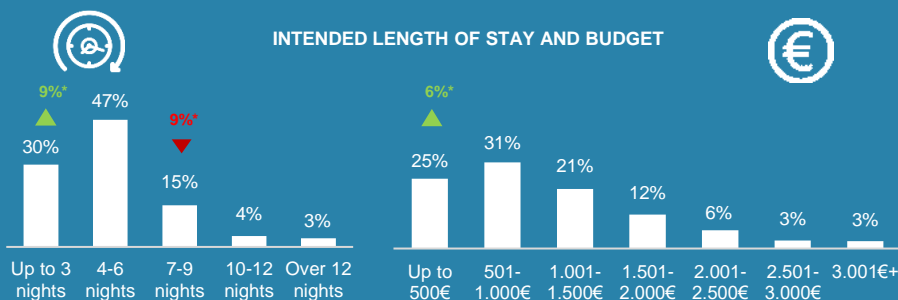
WHERE TO?



AND WITH WHOM?



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



TOP 5 EUROPEAN DESTINATIONS**

France	14%
Spain	9%
Germany	9%
Austria	7%
Greece	6%

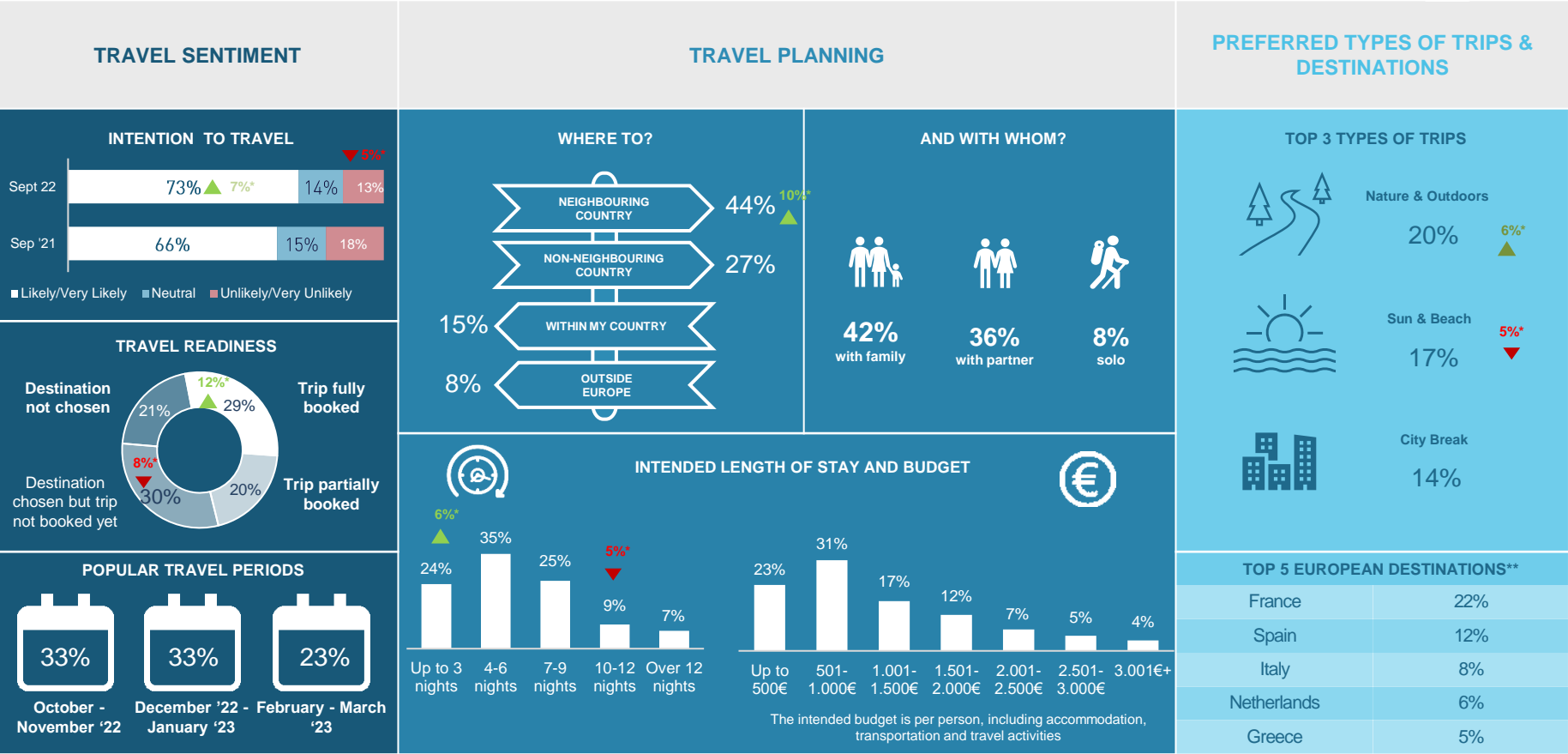
* Significant increase ▲ or decrease ▼ vs the same time last year

** 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: October 2022-March 2023



* Significant increase▲ or decrease▼ vs the same time last year

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

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

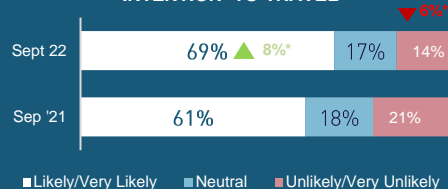
A SNAPSHOT OF SWISS TRAVEL PLANS

Travel horizon: October 2022-March 2023

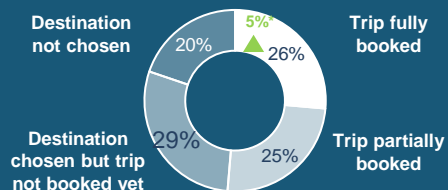


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

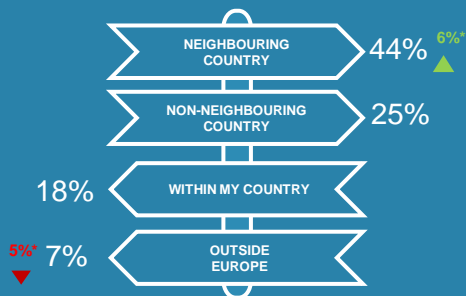


POPULAR TRAVEL PERIODS



TRAVEL PLANNING

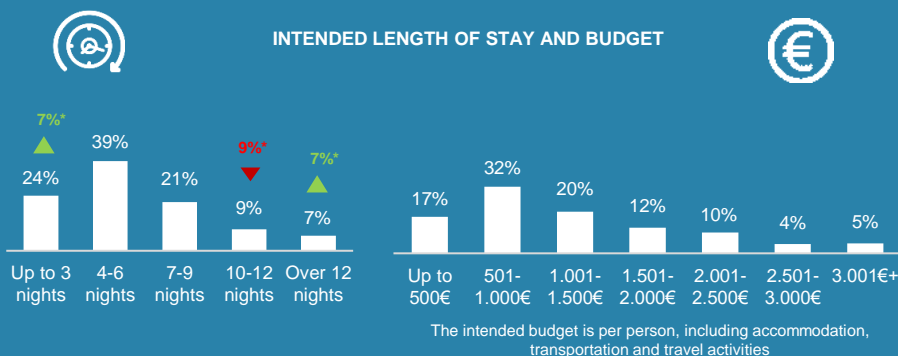
WHERE TO?



AND WITH WHOM?

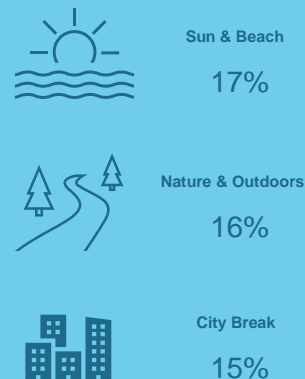


INTENDED LENGTH OF STAY AND BUDGET



PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS



TOP 5 EUROPEAN DESTINATIONS**

Germany	14%
Italy	13%
France	12%
Spain	9%
Austria	7%

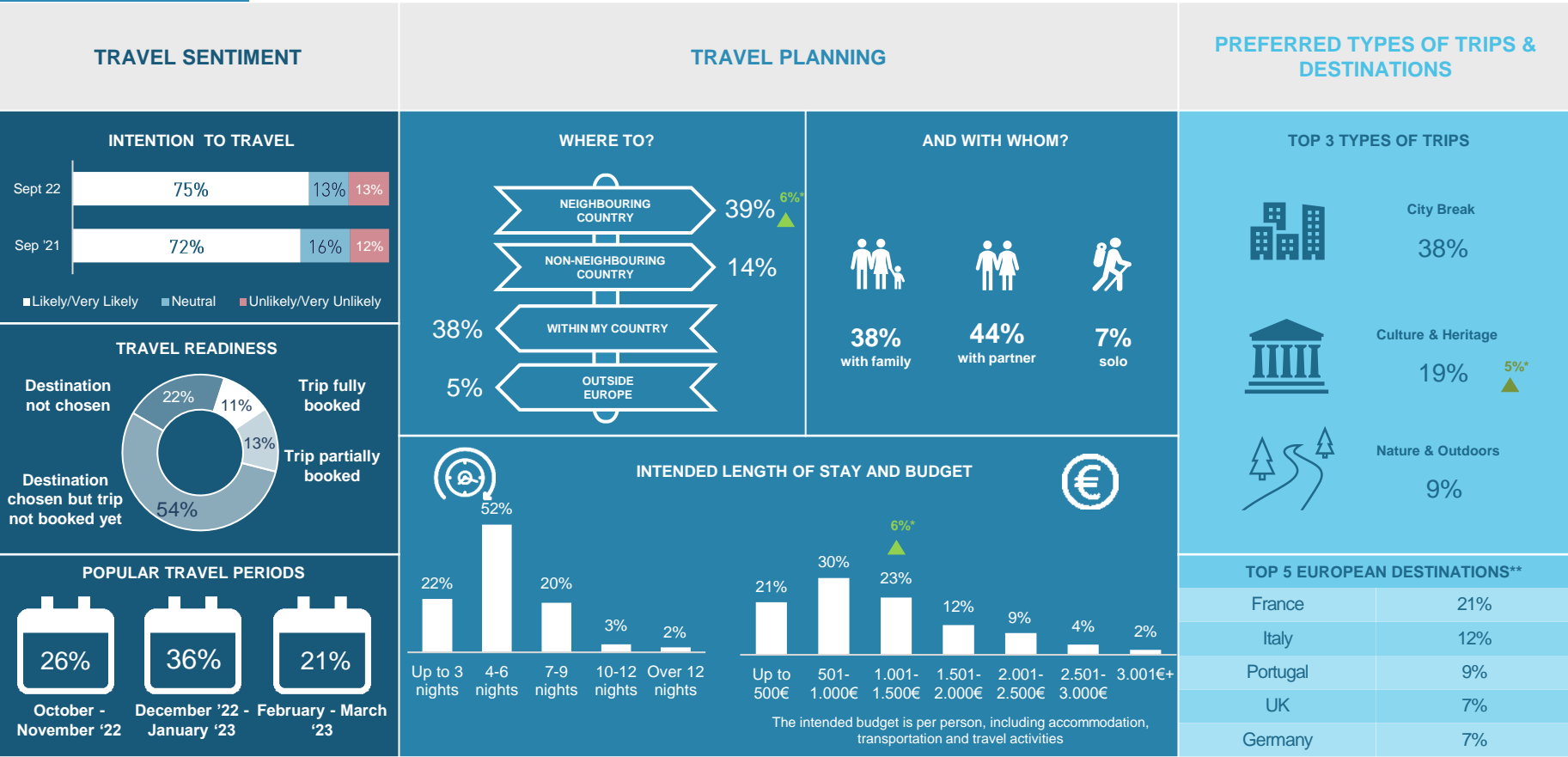
* Significant increase ▲ or decrease ▼ vs the same time last year

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

No. of respondents: 485 (total sample of respondents per country)

A SNAPSHOT OF SPANISH TRAVEL PLANS

Travel horizon: October 2022-March 2023



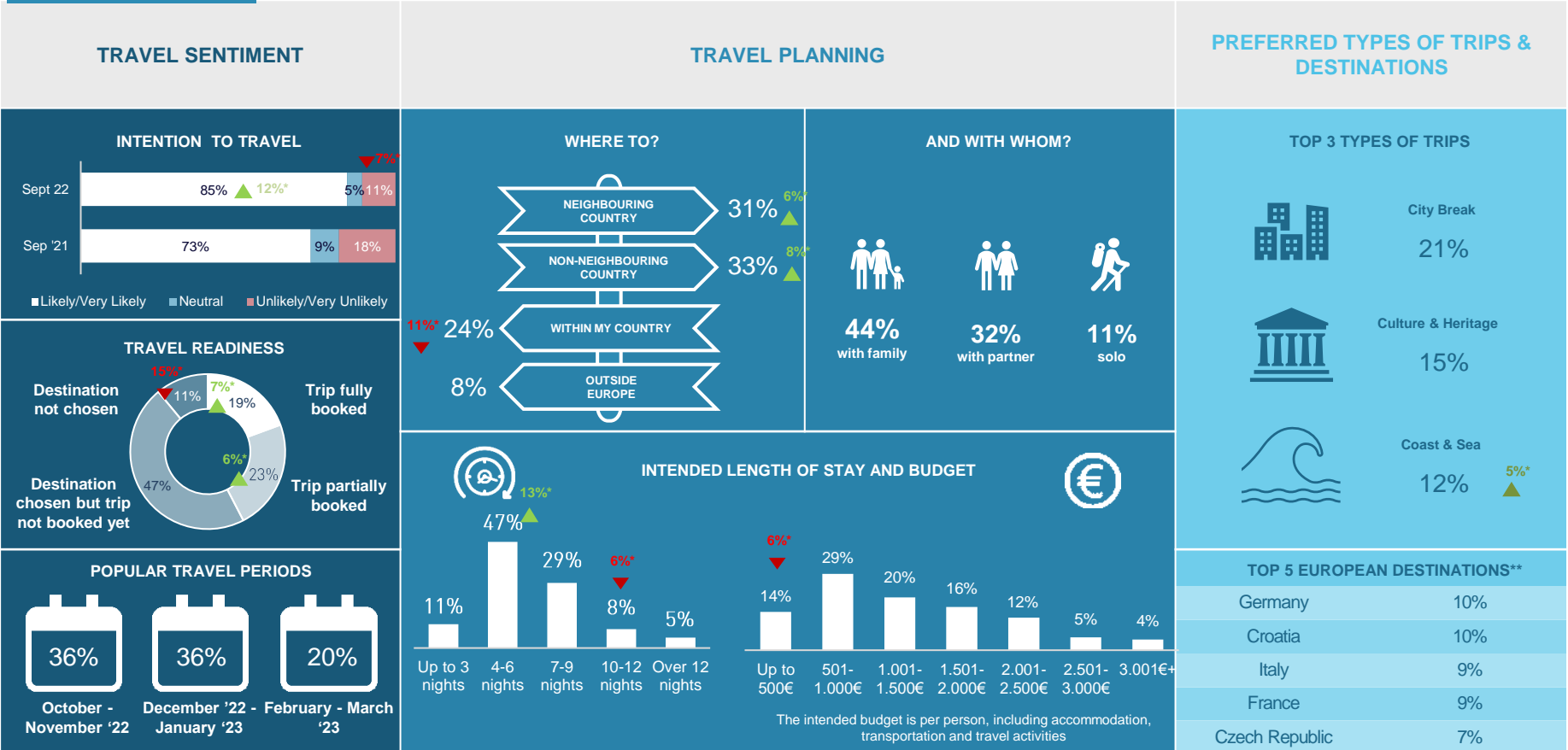
* Significant increase▲ or decrease▼ vs the same time last year

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

No. of respondents: 501 (total sample of respondents per country)

A SNAPSHOT OF POLISH TRAVEL PLANS

Travel horizon: October 2022-March 2023



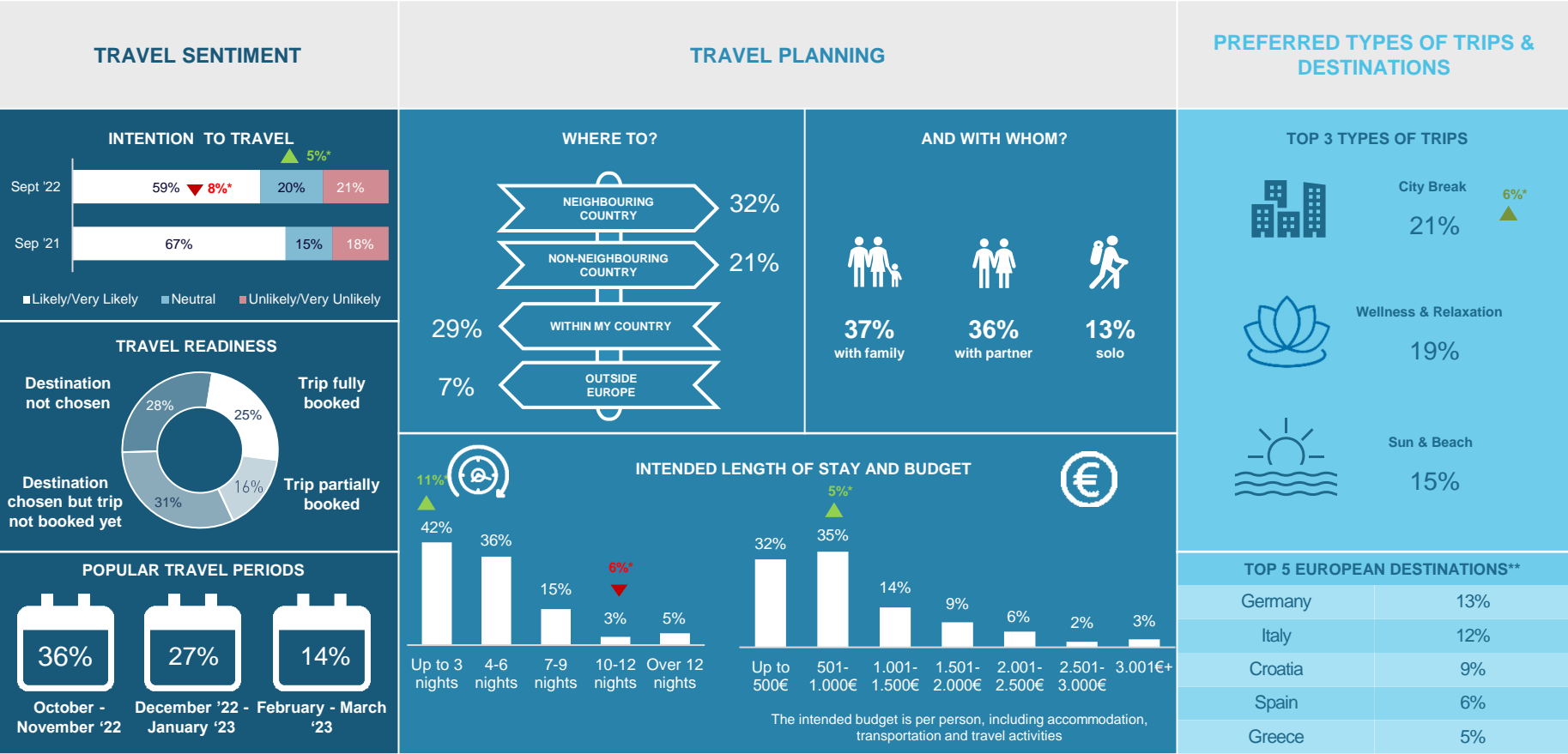
* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

A SNAPSHOT OF AUSTRIAN TRAVEL PLANS

Travel horizon: October 2022-March 2023



* Significant increase ▲ or decrease ▼ vs the same time last year

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

No. of respondents: 501 (total sample of respondents per country)

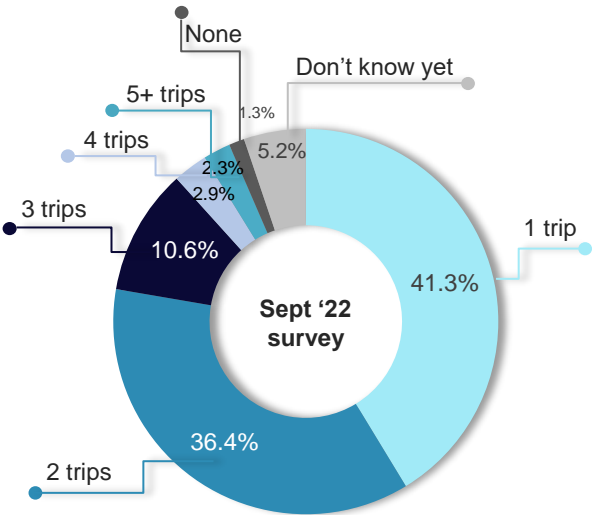
TRIP PLANNING

02

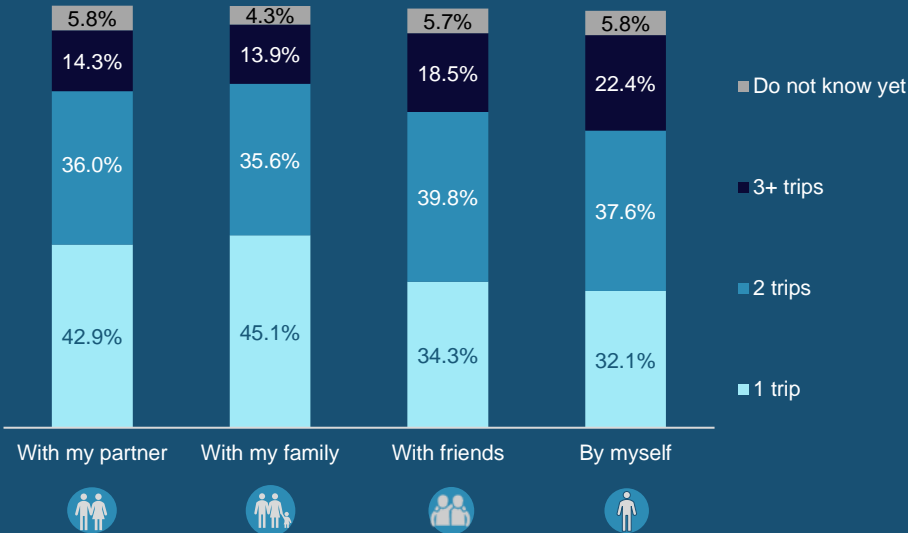
Europeans travelling solo or with friends are most likely to go on several trips in the coming 6 months



Number of intended trips within Europe in the next 6 months



Number of intended trips within Europe vs. preferred travel companion (top 4)



Despite operational difficulties over the summer, air travel remains Europeans' most preferred transportation mode, while train/bus travel slightly grows by 3% compared to September 2021

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



Spain

71.1%

5%* ▲



France

57.2%



UK

65.7%

7%* ▲

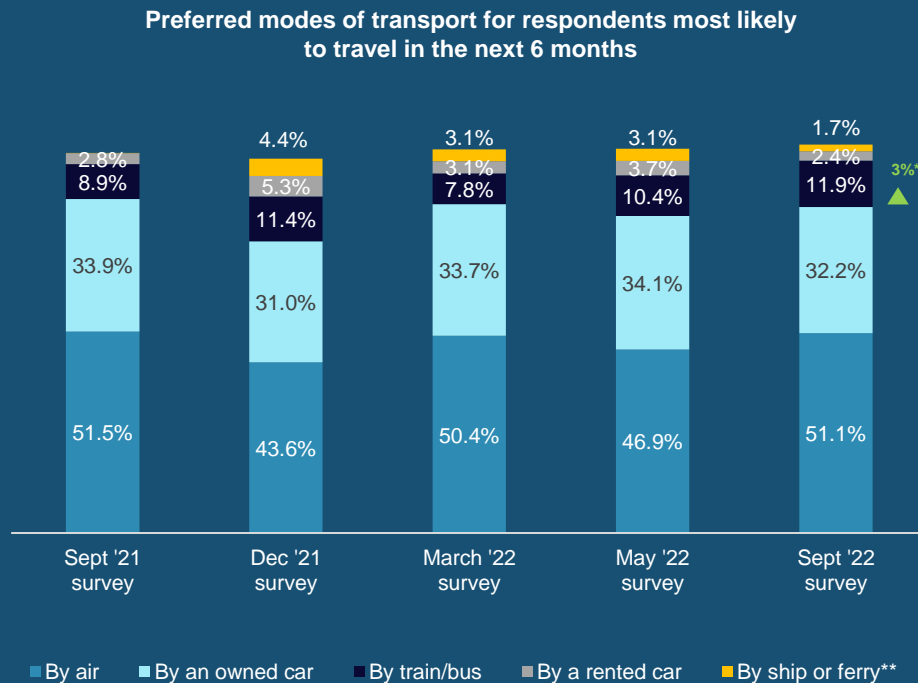


Poland

50.4%

Italy

65.0%



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

*Statistically significant difference vs a year ago (September 2021)

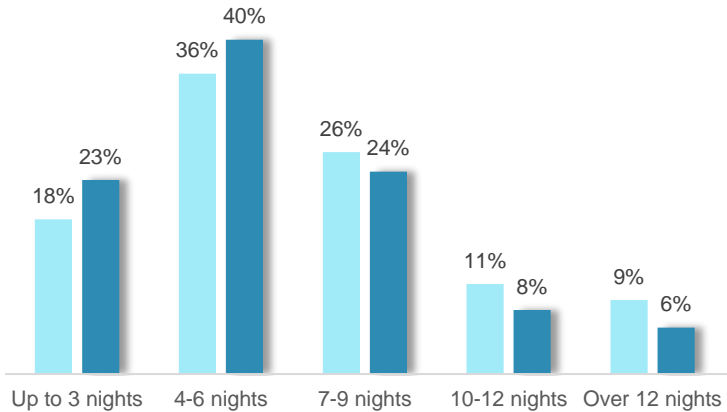
**Up to September '21, 'By ship or ferry' were included in 'Other'

No. of respondents: 4,199

63% of Europeans plan trips of up to 6 nights (+9% compared to September 2021);
500-1,000 euros remains the most common budget

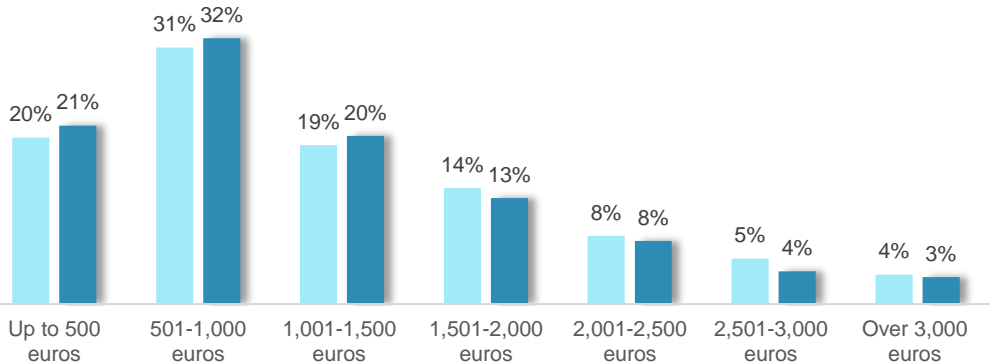


Intended length of stay (nights)



Envisaged budget

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



■ Sept '21 survey ■ Sept '22 survey

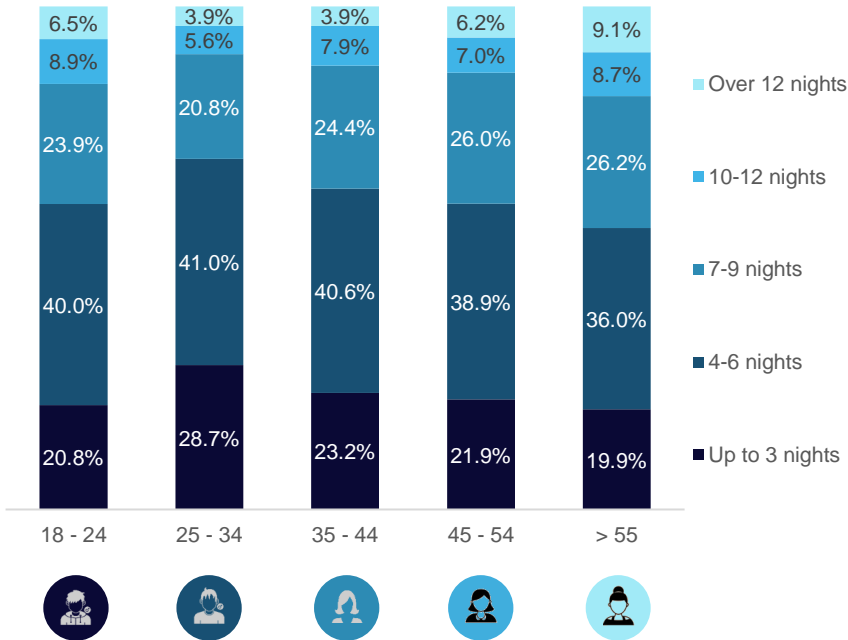


Travellers from Austria (66%) and Germany (57%) plan to spend up to 1,000 euros to a greater extent. Polish (21%), Dutch (20%) and Swiss (19%) travellers expect to spend 2,000+ euros more than other source markets

Baby boomers (aged above 55) are more willing to plan trips of over 12 nights (9%), while Gen Z (aged 18-24) are the ones most likely to spend over 2,000 euros (19%)

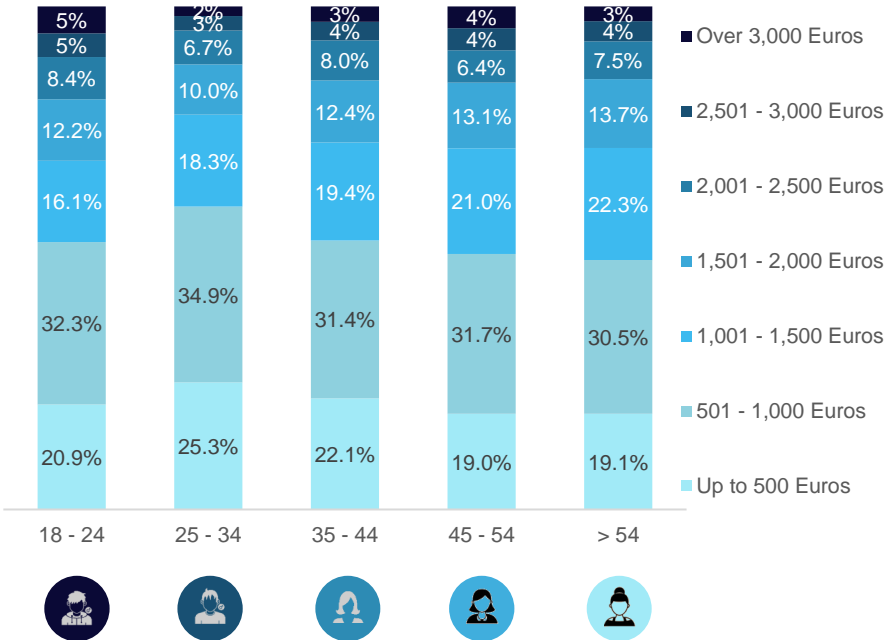


Intended length of stay (nights)



Envisaged budget

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

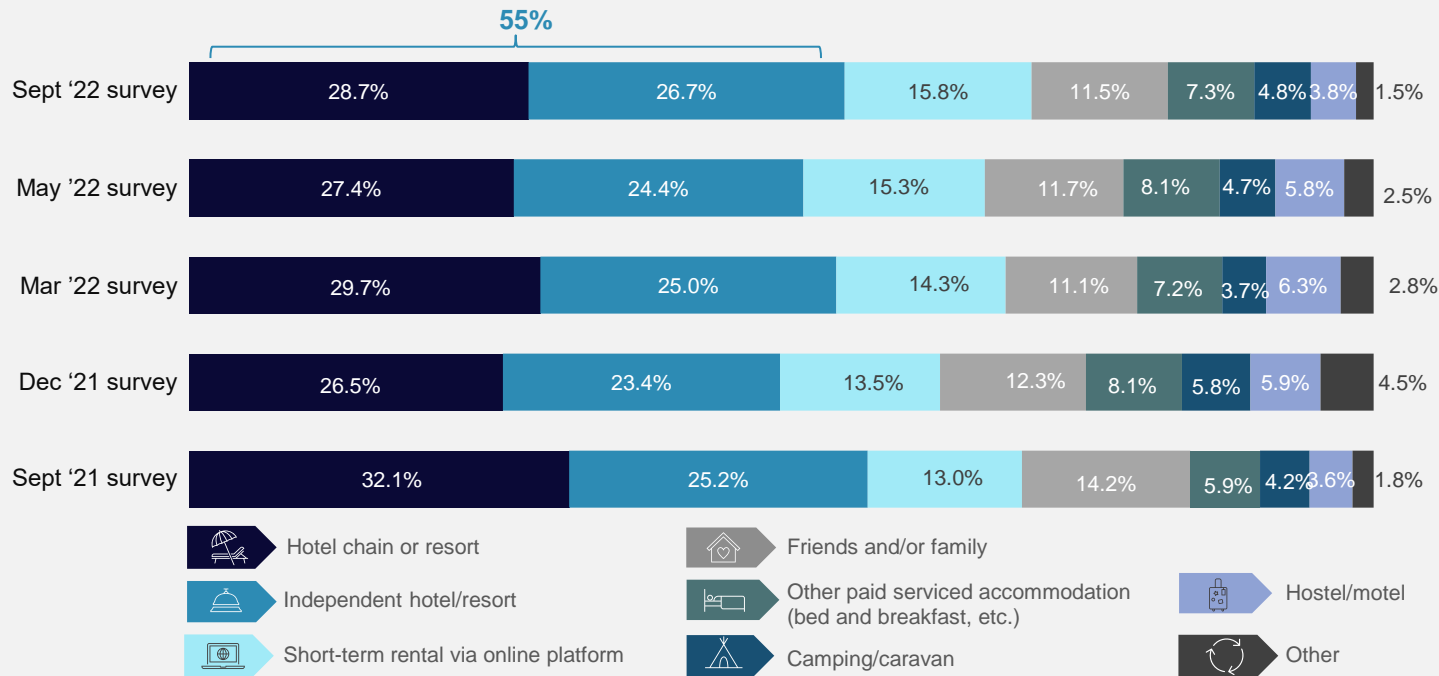


Q19. What would be the length of your next overnight trip?

Q20. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

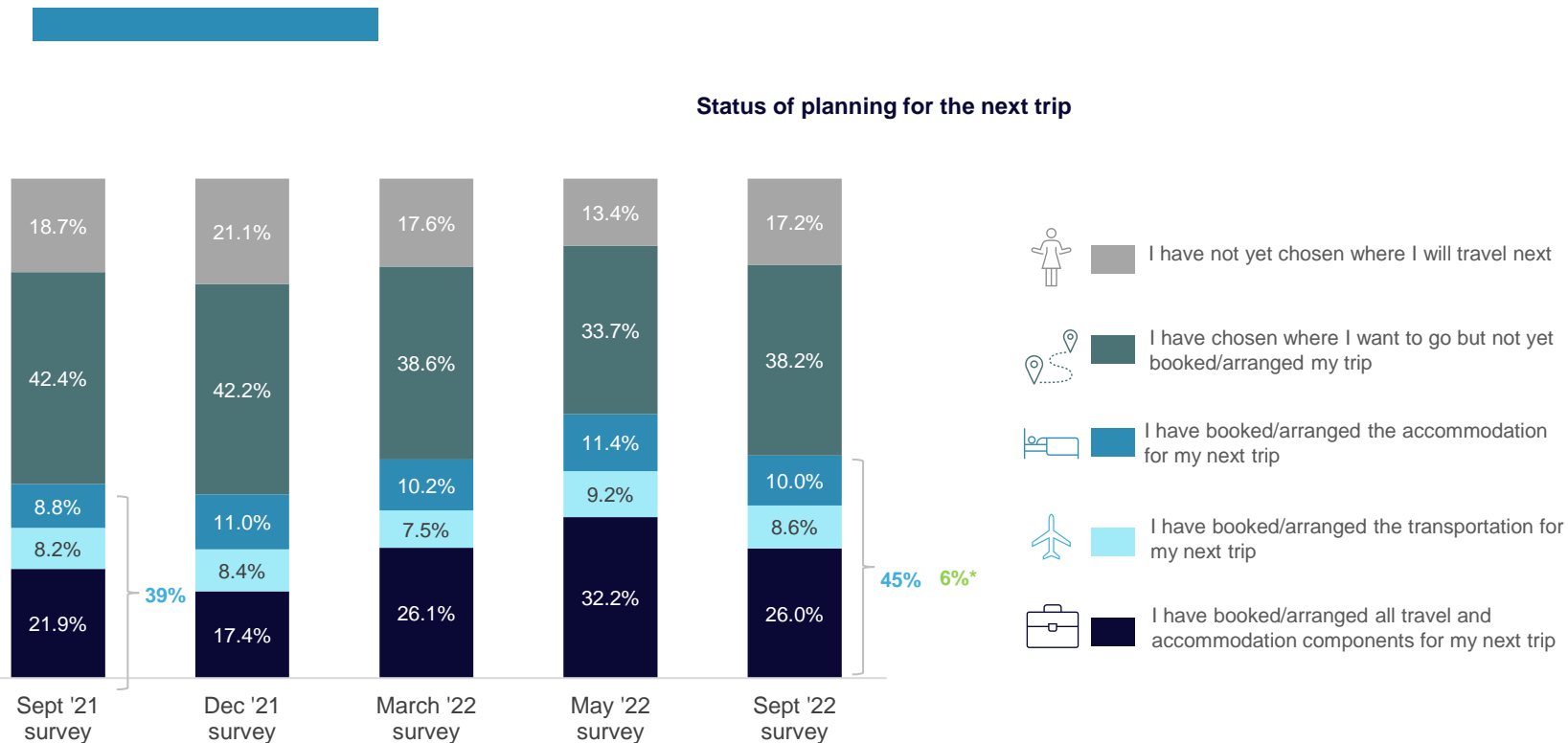
As interest in City Breaks rises, Europeans' preference for hotels increases by 4% (compared to May 2022), while the preference for short-term rentals climbs to its highest level (16%) since September 2020

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



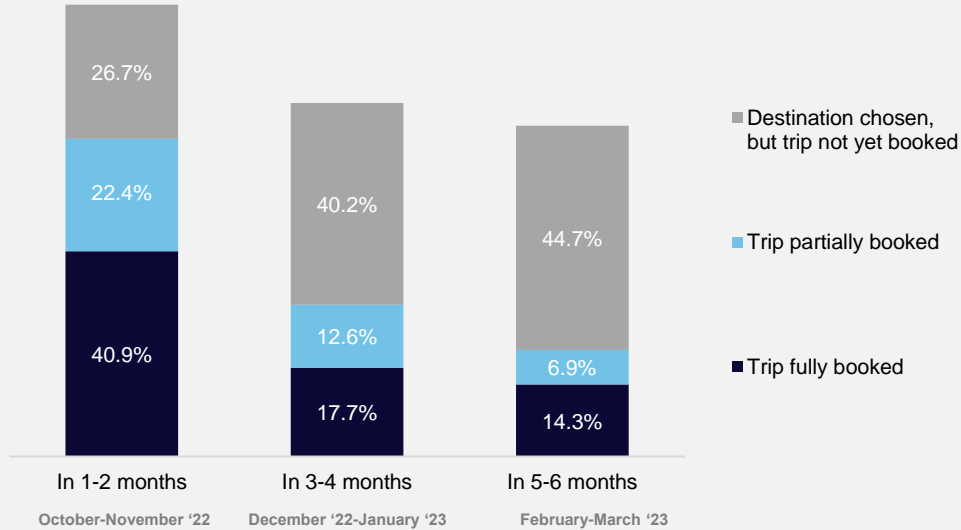
Hotels are the most popular accommodation option for City Break (59%) and Sun & Beach (61%) travellers

The share of Europeans who have fully/partly booked their trip (45%) increased by 6% compared to a year ago

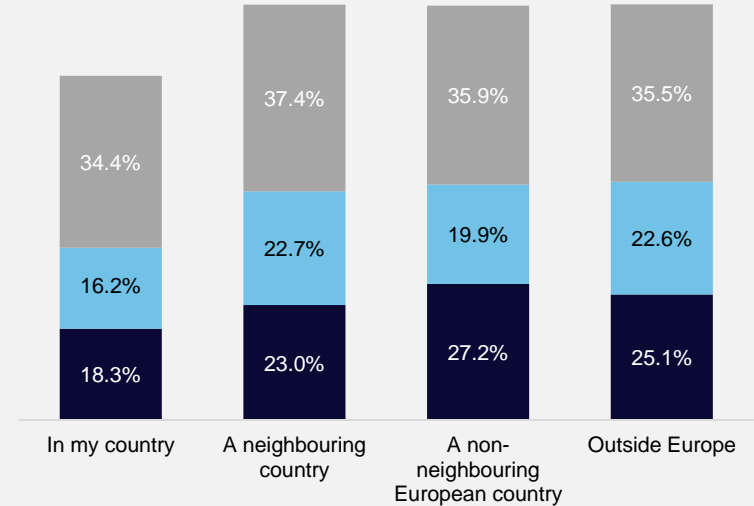


2 in 5 trips planned for the next 1-2 months have been fully booked,
compared to less than 15% of the trips planned for February-March 2023

**Booking status
and timing of next trip**



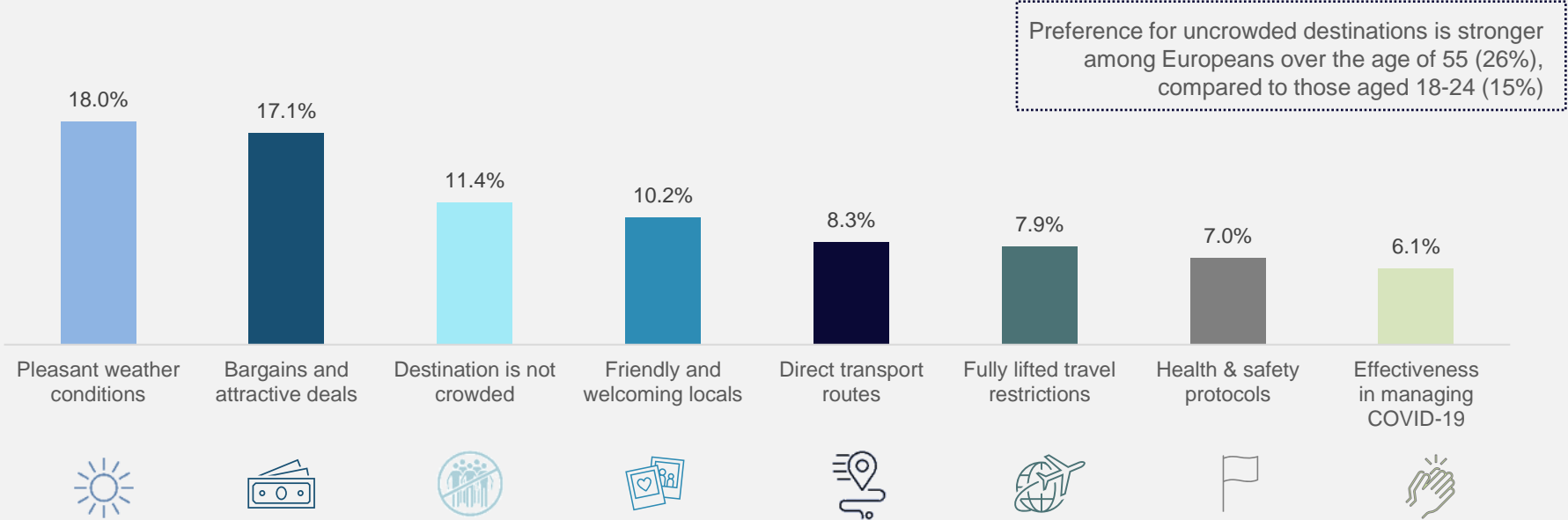
**Booking status
and travel destination**



Sept '22 survey

Good weather, attractive prices and fewer crowds
remain Europeans' leading criteria for selecting a travel destination

Top 8 criteria for choosing the next travel destination



Sep '22 survey

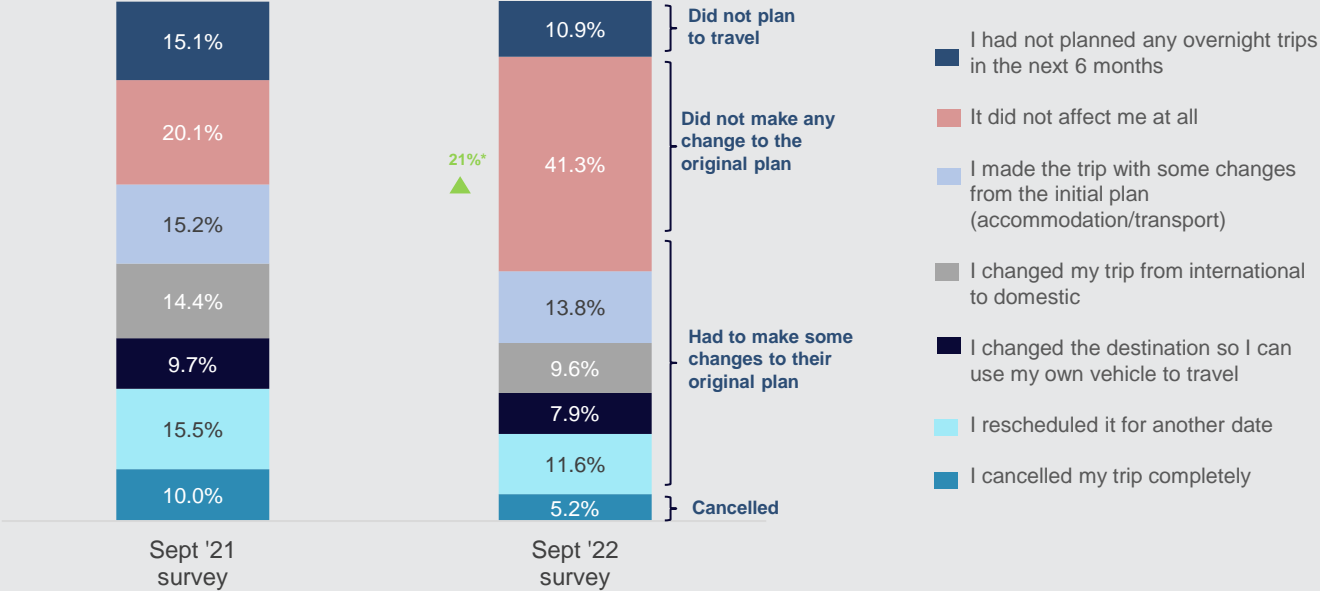
TRAVEL CONCERNS

03

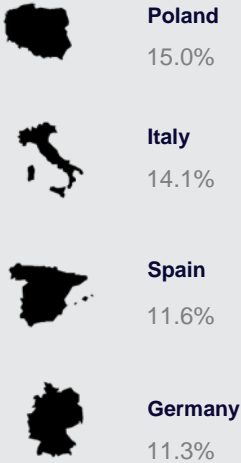
The impact of COVID-19 on Europeans' travel behaviour drops to its lowest point since September 2020, resulting in no changes to the travel plans of 41% of respondents (+21% compared to September 2021)



How has COVID-19 affected travel plans?

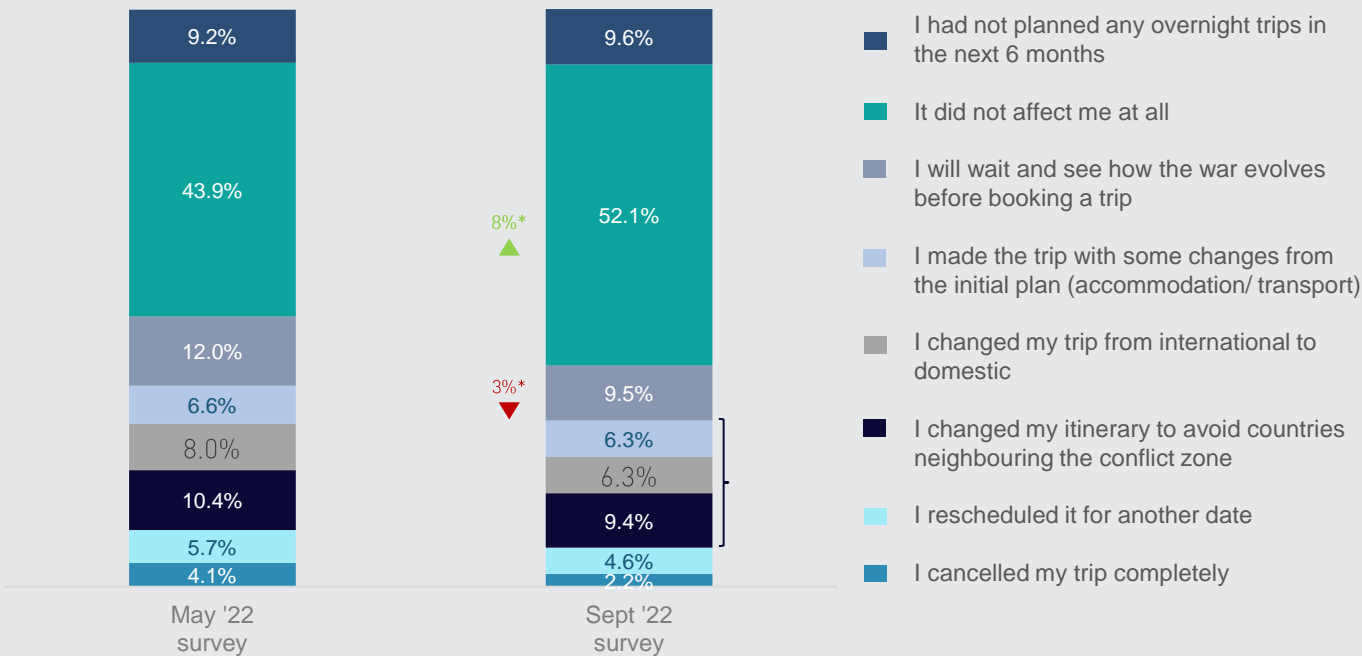


Top 4 markets choosing domestic over international travel

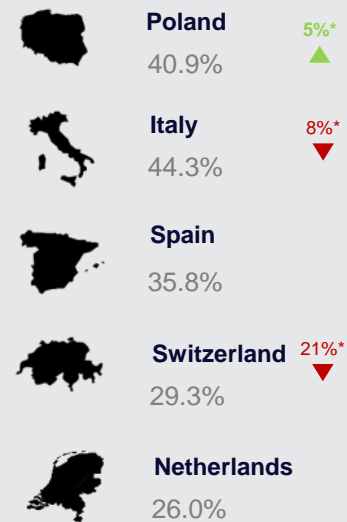


As the war in Ukraine continues, its effects on the travel plans of Europeans decreases, having no impact on any travel arrangements for 52% of respondents (+8% compared to May 2022)

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



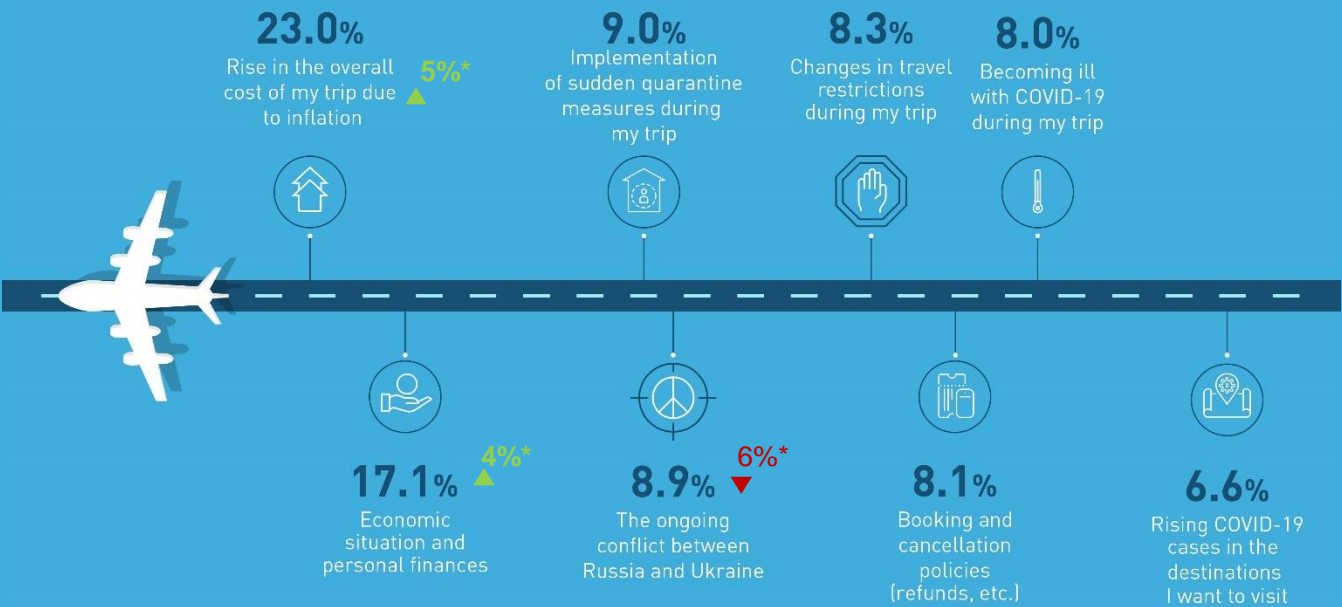
Top 5 markets to make changes in their trip planning



EUROPEAN TRAVELLERS' CONCERNS

Travel price inflation and the economic situation are what worry Europeans the most, while concerns over the war in Ukraine fade (-6%)

Leading concerns for those who are most likely to travel next (Sept'22 survey)



Top 4 markets concerned with rising travel costs

Spain 12%
28.0% ▲

Poland
25.3%

Belgium 7%
24.7% ▲

Italy 7%
23.5% ▲

Top 4 markets concerned with personal finances

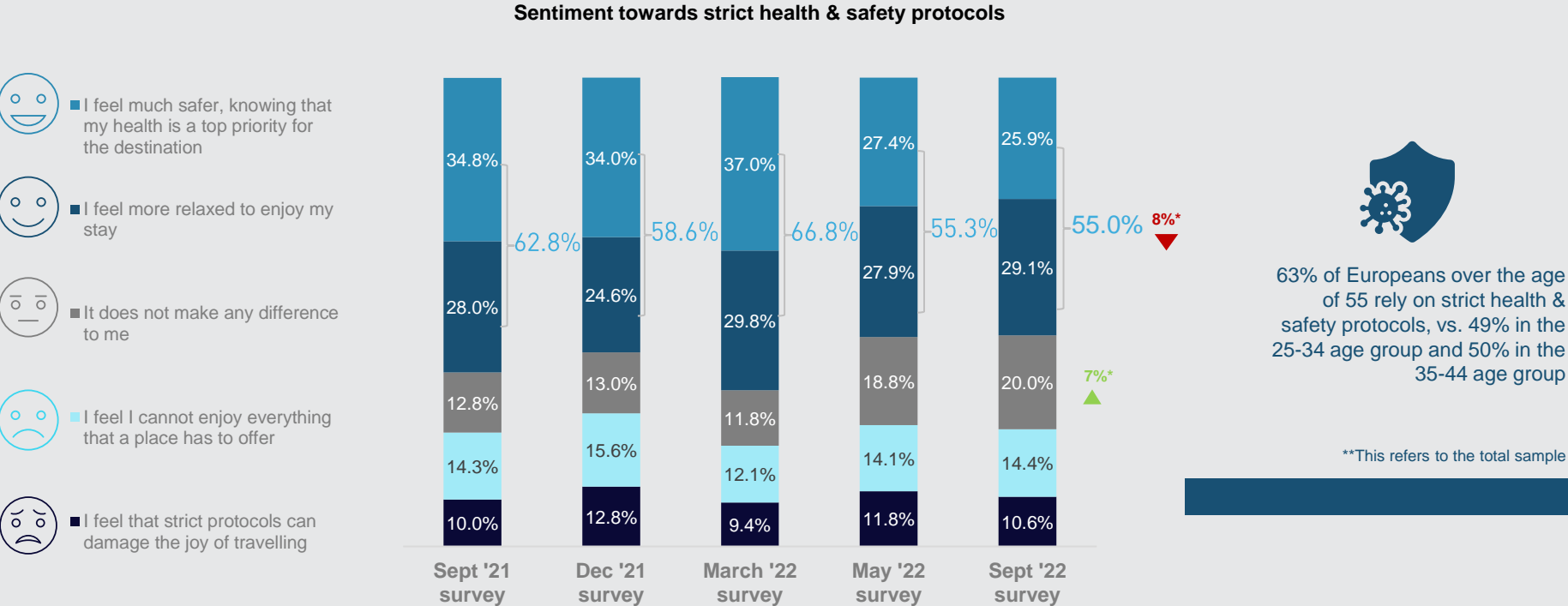
Belgium 5%
19.9% ▲

Germany 7%
19.6% ▲

Poland
18.7%

UK 7%
18.3% ▲

Strict health and safety protocols maintain their importance despite the drop in COVID-19-related concerns



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

*Statistically significant difference vs a year ago (September 2021)
No. of respondents: 4,199

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 / **Wave 13:** 13-23 September 2022; sample = 5,988
 - **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 13 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	120	97	92	56	124	95	206	996
	25 - 34	136	112	74	142	129	153	106	115	119	119	1,205
	35 - 44	126	135	101	107	141	150	120	124	132	79	1,215
	45 - 54	138	167	106	78	146	168	93	92	80	50	1,118
	≥55	262	263	175	54	238	187	125	45	59	46	1,454
Total		750	750	501	501	751	750	500	500	485	500	5,988

Study on Monitoring Sentiment for Intra-European Travel

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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 eliminate every margin of error.

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