



# MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 14 | 02/23

**EUROPEAN  
TRAVEL  
COMMISSION**



Co-funded by the  
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# WAVE 14

## RESEARCH HIGHLIGHTS



This report monitors sentiment and short-term intentions for domestic and intra-European travel and is the **14<sup>th</sup> wave of a market research**<sup>1</sup> initiated in September 2020. Results are based on data collected in December 2022 from Europeans in 10 high-volume source markets.

- **77% of Europeans plan to travel between January - June 2023, representing a 16% surge over the same period last year.** Furthermore, 58% of respondents intend to take multiple trips in the next 6 months (+6% over the previous wave in September 2022).
- **Visiting another European country is the preferred choice for 63% of Europeans** (+13% compared to a year ago): 35% plan to visit a neighbouring destination, and 28% will travel to a non-neighbouring one. Interest in **domestic** tourism dropped **to its lowest level (25%) since August 2020**.
- **Sun & Beach is once again Europeans' preferred type of leisure trip (17%), followed by City Breaks (16%) and Culture & Heritage (15%).** Enjoying natural landscapes (19%), tasting the local cuisine (17%) and immersing in the local culture (15%) are now travellers' most sought-after experiences.

# WAVE 14

## RESEARCH HIGHLIGHTS

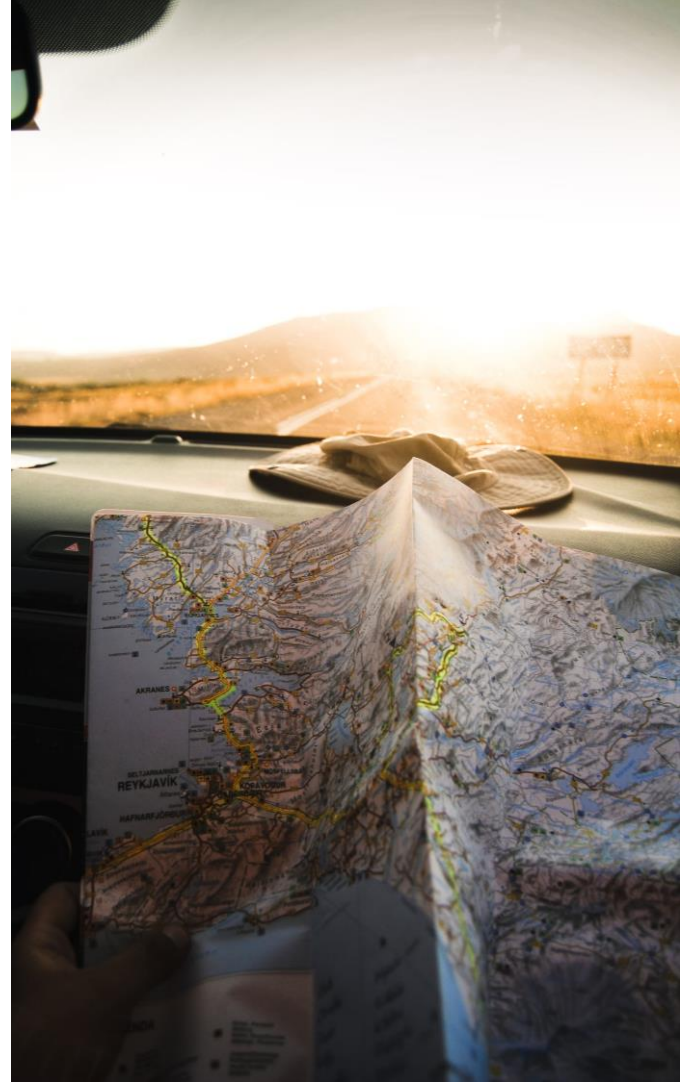


- **72% of Europeans will travel for leisure purposes**, 15% will visit friends or relatives, 7% will attend an event, and 5% will take a business trip.
- **The top three criteria for choosing the next travel destination are pleasant weather (18%), travel bargains and deals (17%) and friendly locals (12%).** For travellers aged 25-44, attractive offers are the most important decision factor. Only 6% of respondents consider destinations' actions to preserve natural and cultural heritage as a primary choice factor.
- The number of travellers planning to fly to their destination (54%) **is the highest since 2020 and up 10% from the same period in 2021.** 29% of Europeans plan to drive their car and another 10% will take the train for their next trip.
- **44% of Europeans have fully/partly booked their upcoming trip**, a 7% year-on-year increase. Among examined markets, the Austrians (27%) and the British (25%) have fully booked to a higher extent, along with the Dutch and the Belgians (24% each).
- Despite current economic concerns, Europeans will spend **similar time and budget on holidays**, as per one year ago: **39% are planning trips of 4-6 nights** (+6% compared to a year ago), while **500-1,500 euros is still the most common allocated budget (29%)**

# WAVE 14

## RESEARCH HIGHLIGHTS

- **23% of Europeans mention increased trip costs**, and **18% their personal finances** as a major travel concern.
- On the positive side, **59% of Europeans plan to spend the same budget on holidays** as they would normally do, demonstrating a **strong resilience compared to other spending categories**. For instance, around 40% of respondents intend to reduce their budget for retail shopping (clothes, electronics, etc.), leisure activities, sport and self care.
- While travel desire remains strong, Europeans are adapting their in-destination behaviour due to increased costs: **18% will reduce their shopping activities**, **16% will select cheaper accommodation** and **15% will be settling for less expensive restaurants/self-catering**. Affordable all-inclusive packages (12%) and fewer activities with admission fees are also considered (10%) .
- Concerns over the war in Ukraine (11%) increase slightly compared to September 2022, causing **31% of respondents to make changes to their next trip** (+5%).



# WAVE 14

## RECOMMENDATIONS FOR DESTINATIONS



- 80% of Europeans over the age of 55 plan to travel by June 2023; destinations can **attract this segment by addressing their interest for culture & heritage attractions (38%), and outdoor experiences to explore the natural landscape (19%), and by promoting travel itineraries for trips longer than 7 nights (50%).**
- Considering the importance of bargains and deals in choosing a destination, DMOs can bring local businesses together to **create affordable travel packages, promote free-entrance attractions and the inexpensive accommodations and eateries at the destination.**
- Friendly and welcoming locals are now the 3<sup>rd</sup> most important factor in choosing a destination. Thus, DMOs could **promote the human aspects of the destination (e.g., by involving locals in campaigns) and create local experiences that allow travellers to engage with residents.**
- As the preference for air travel grows (+10% compared to a year ago), CO2 emissions increase accordingly. To support the sector in its critical journey to reduce carbon emissions, destinations are encouraged to **promote train travel further and create holiday packages based on train transportation**, which are currently favoured by only 10% of European travellers.

# WAVE 14

## RECOMMENDATIONS FOR BUSINESSES



- 58% of Europeans have either partly booked their next trip or have chosen a destination but have not yet booked. To encourage these consumers to take a step further and complete their booking, **businesses could employ re-marketing and lead-nurturing tactics** to re-engage with audiences who have already interacted with the brand, (e.g., by displaying ads to prospective customers who visited a site without checking out).
- 32% of Europeans planning to travel in May-June have already fully/partially booked their trip. In response to the high level of interest in travel bargains and deals and in order to capitalise on this momentum, businesses can **promote affordable packages for this period and reward early-bookers**.
- As Europeans consider less expensive accommodation, hotels can **offer room-only stays, cheaper accommodation that excludes hotel amenities and daily housekeeping, and discounts for booking multiple nights**. They can also offer **all-inclusive packages** that allow visitors to have better control over their spending.
- 32% of Europeans over the age of 55 plan a domestic trip by June 2023, and **businesses targeting local travellers can promote culture and heritage attractions (38%)** and experiences that focus on **enjoying nature (19%)**, **tasting the local cuisine (18%)** and **exploring the local culture (17%)** - the preferred activities of this age group.

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# How to read

## Wave 14

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

	<a href="#">Wave 10</a>	<a href="#">Wave 11</a>	<a href="#">Wave 12</a>	<a href="#">Wave 13</a>	<a href="#">Wave 14</a>
Survey dates	23-31 Dec '21	1-9 March '22	9-12 May '22	13-23 Sept '22	15-29 Dec '22

2. To present Wave 14 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: January - February 2023
  - In 3-4 months: March - April 2023
  - In 5-6 months: May - June 2023
3. To present data and insights, the following distinct groups have been analysed:
  - Total respondents: 6,000
  - Respondents most likely to travel in the next 6 months: 4,606
  - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,655
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.

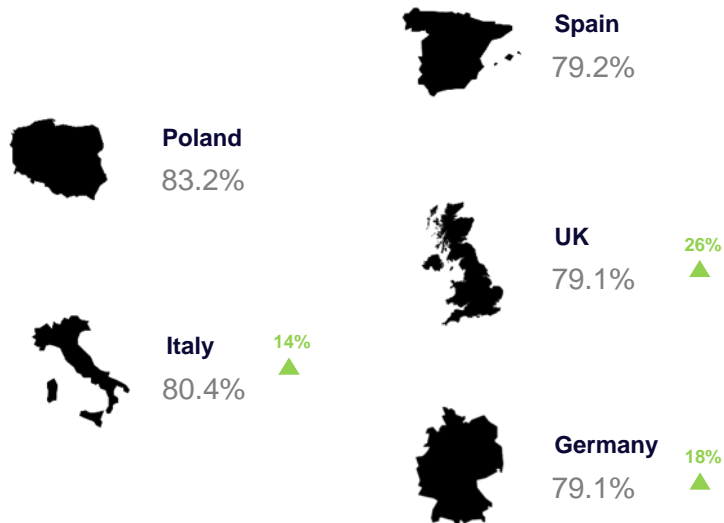
A man and a woman are smiling and looking at each other in a historical setting. They are standing in front of large, ornate statues. The man is wearing a light-colored shirt and the woman is wearing a denim jacket. The background shows a city square with other people and buildings.

# TRAVEL INTENTIONS

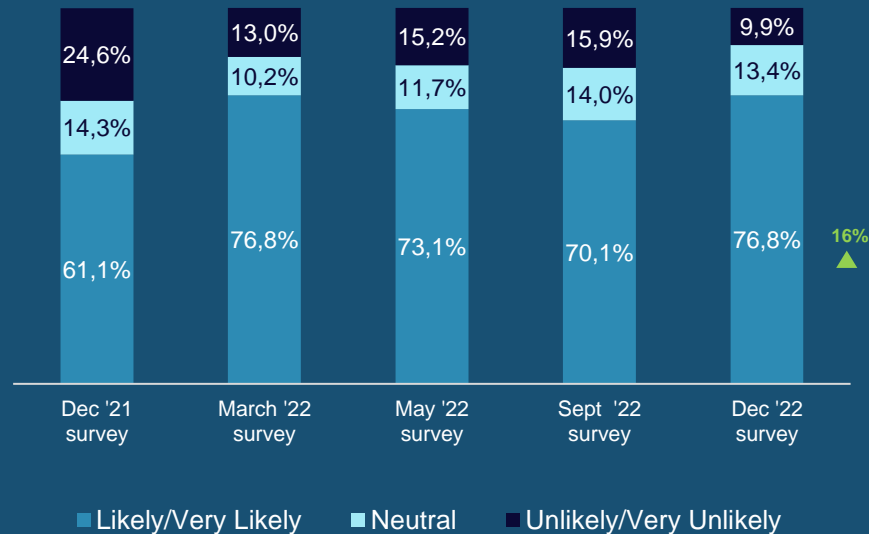
# 01

## Steady travel enthusiasm among Europeans: 77% plan to take a trip by June 2023

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



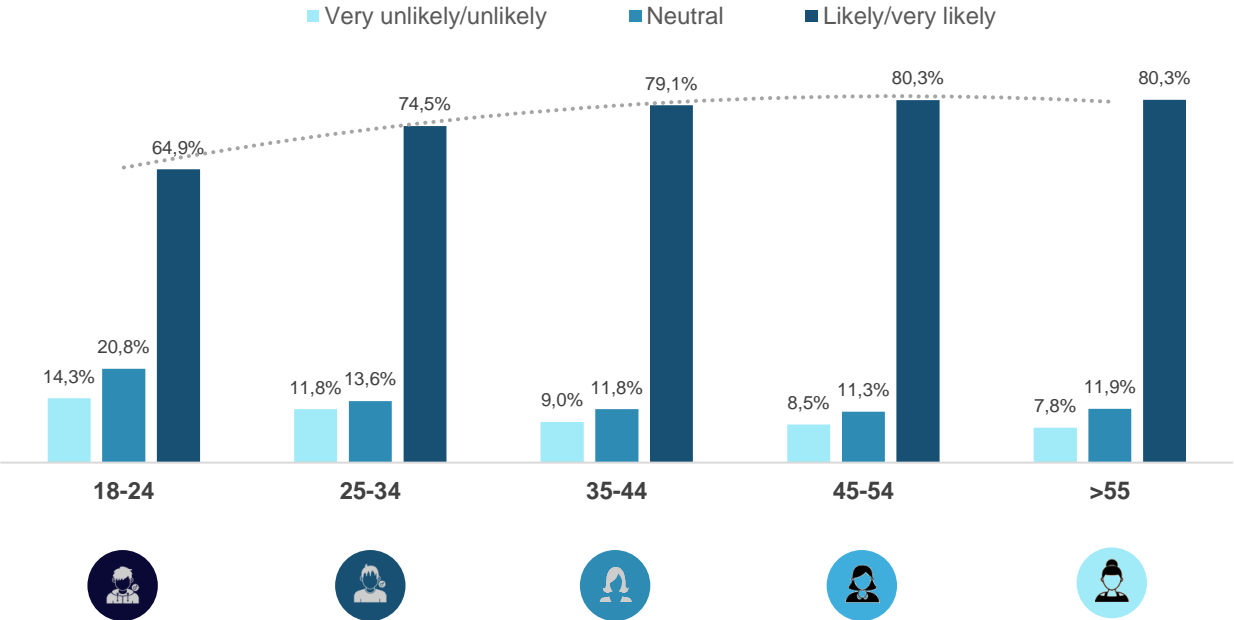
### Intention to travel in the next 6 months



Europeans aged 35 or older have a stronger desire to travel in the next months than their younger counterparts, who demonstrate higher levels of travel uncertainty



Intention to travel in the next 6 months by age group



Top travel experiences by age group:

18-24

- 16% enjoy natural landscapes
- 15% sightseeing
- 13% dive into local culture

25-34

- 17% enjoy natural landscapes
- 16% sightseeing
- 16% taste local cuisine

35-44

- 19% enjoy natural landscapes
- 17% taste local cuisine
- 14% dive into local culture

45-54

- 20% enjoy natural landscapes
- 17% taste local cuisine
- 15% the dive into local culture

55+

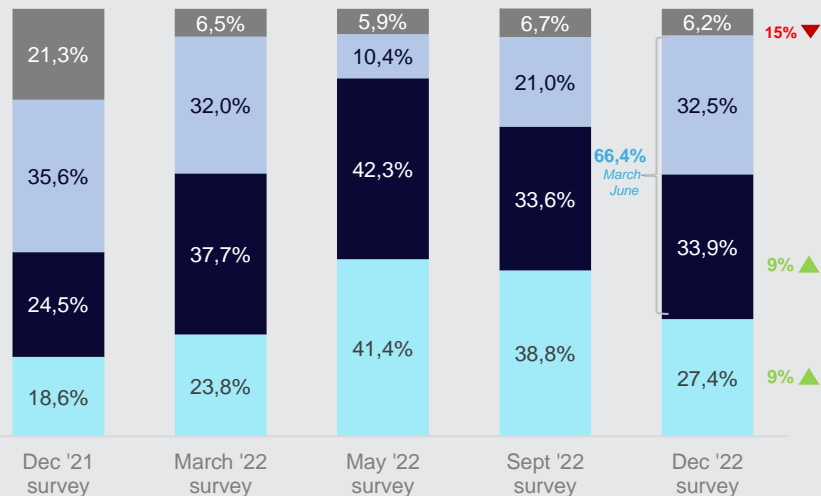
- 19% enjoy natural landscapes
- 18% taste local cuisine
- 17% dive into local culture

Q8. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?  
\*Q6. What criteria will play the most important role in choosing your next holiday destination?

# The majority of Europeans (66%) plan trips from March onwards.

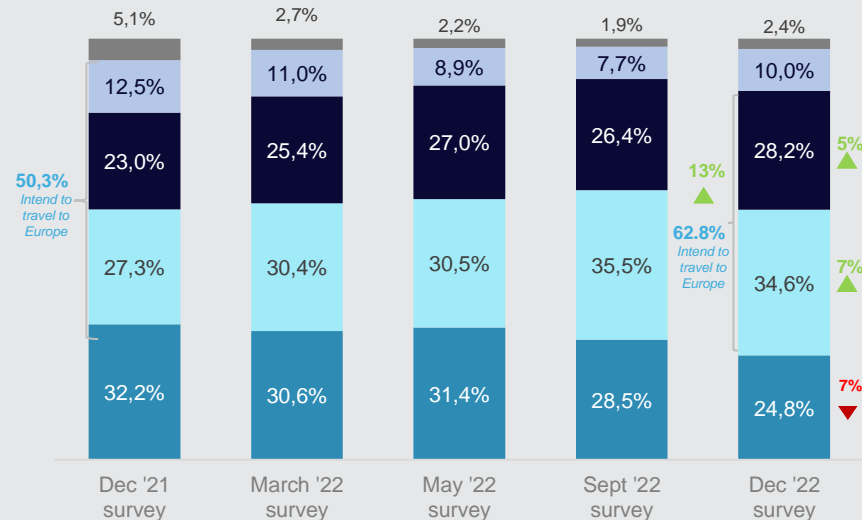
## Interest in visiting non-neighbouring destinations grows significantly compared to a year ago

When will Europeans travel next?



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

Where will Europeans travel within the next 6 months?



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

Q11. When are you most likely to go on your next trip either in your country or within Europe?

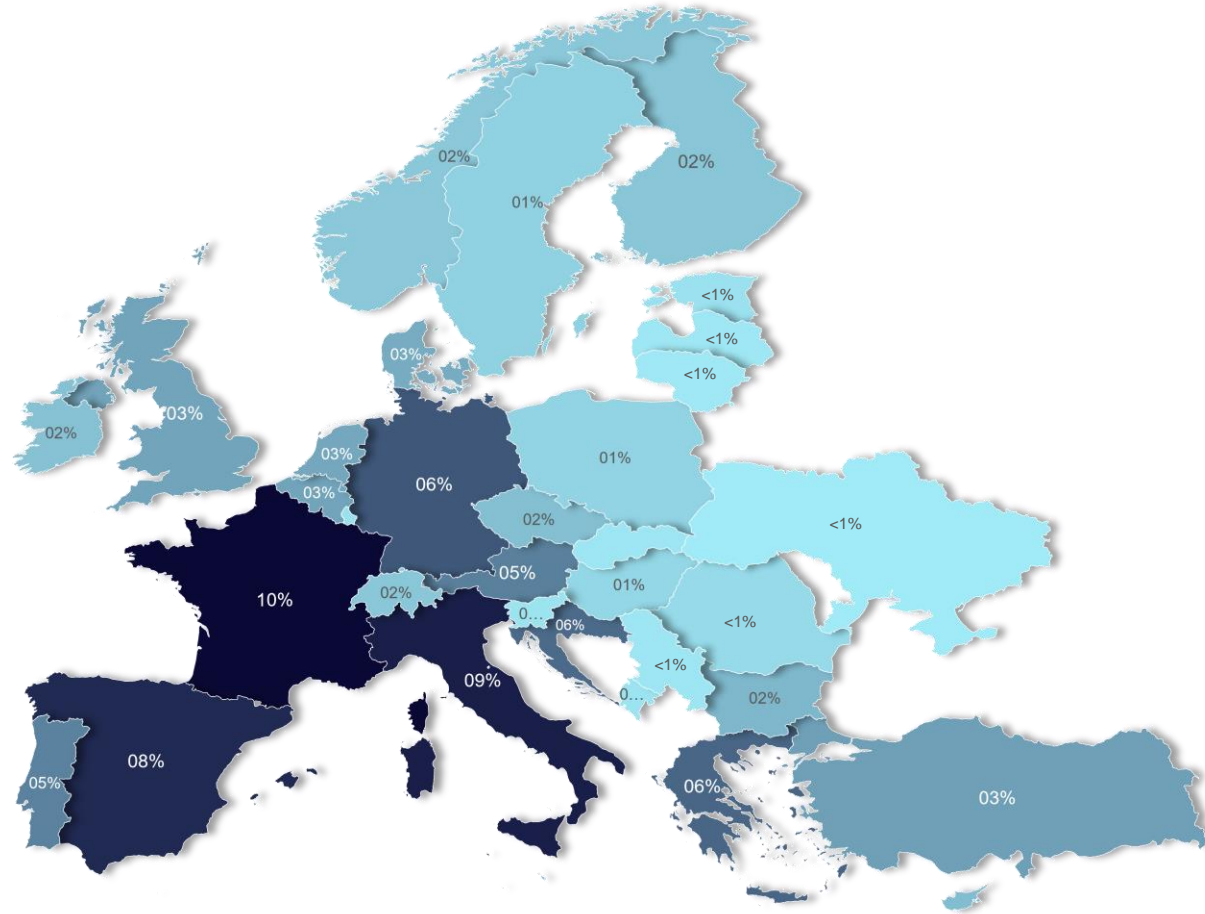
Q12. Where do you plan to travel in the next 6 months?

Dec '22 survey

## PREFERRED COUNTRIES FOR EUROPEANS' NEXT INTERNATIONAL TRIP

### TOP 10 COUNTRIES

France	9.9%
Italy	8.9%
Spain	8.4%
Germany	6.4%
Greece	5.8%
Croatia	5.6%
Austria	4.8%
Portugal	4.7%
Türkiye	3.4%
Belgium	3.2%



\*Please use this map as a reference only

No. of respondents: 4,655

## The vast majority (72%) of Europeans plan to travel for leisure purposes in the short-term



### Top 3 markets to take a leisure trip



**France**

79.1%



**Belgium**

78.9%



**Poland**

76.9%



### Top 3 markets to take a business trip



**Switzerland**

9.2%



**Austria**

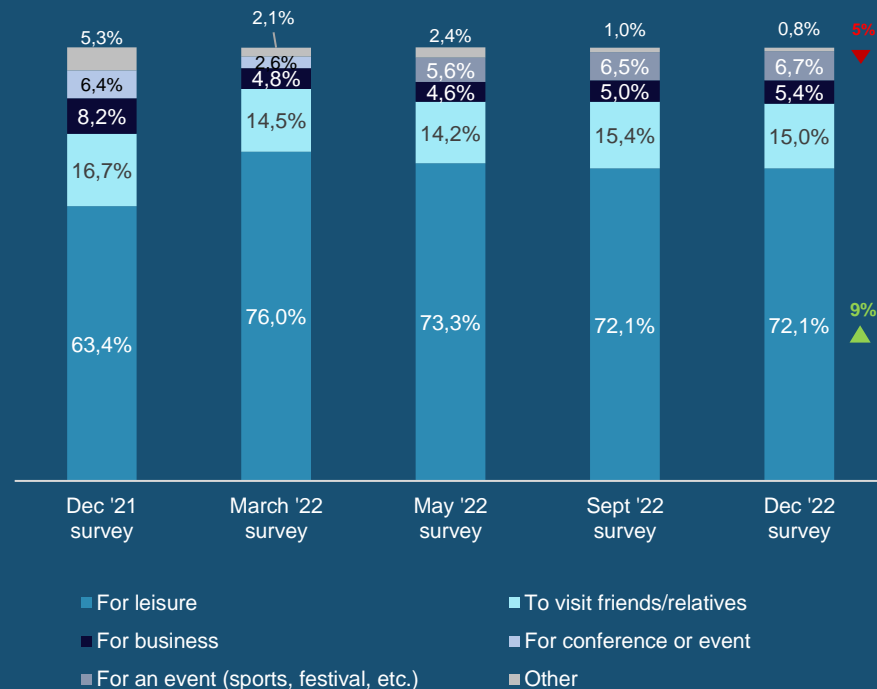
7.7%



**Netherlands**

7.3%

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



## Sun & Beach, City Break and Culture & Heritage trips are Europeans' leading choices for January-June 2023.

### Travellers look forward to enjoy nature or explore the culture and gastronomy of European destinations.

Preferred type of leisure trip in the next 6 months







Preferred type of experiences in the next 6 months



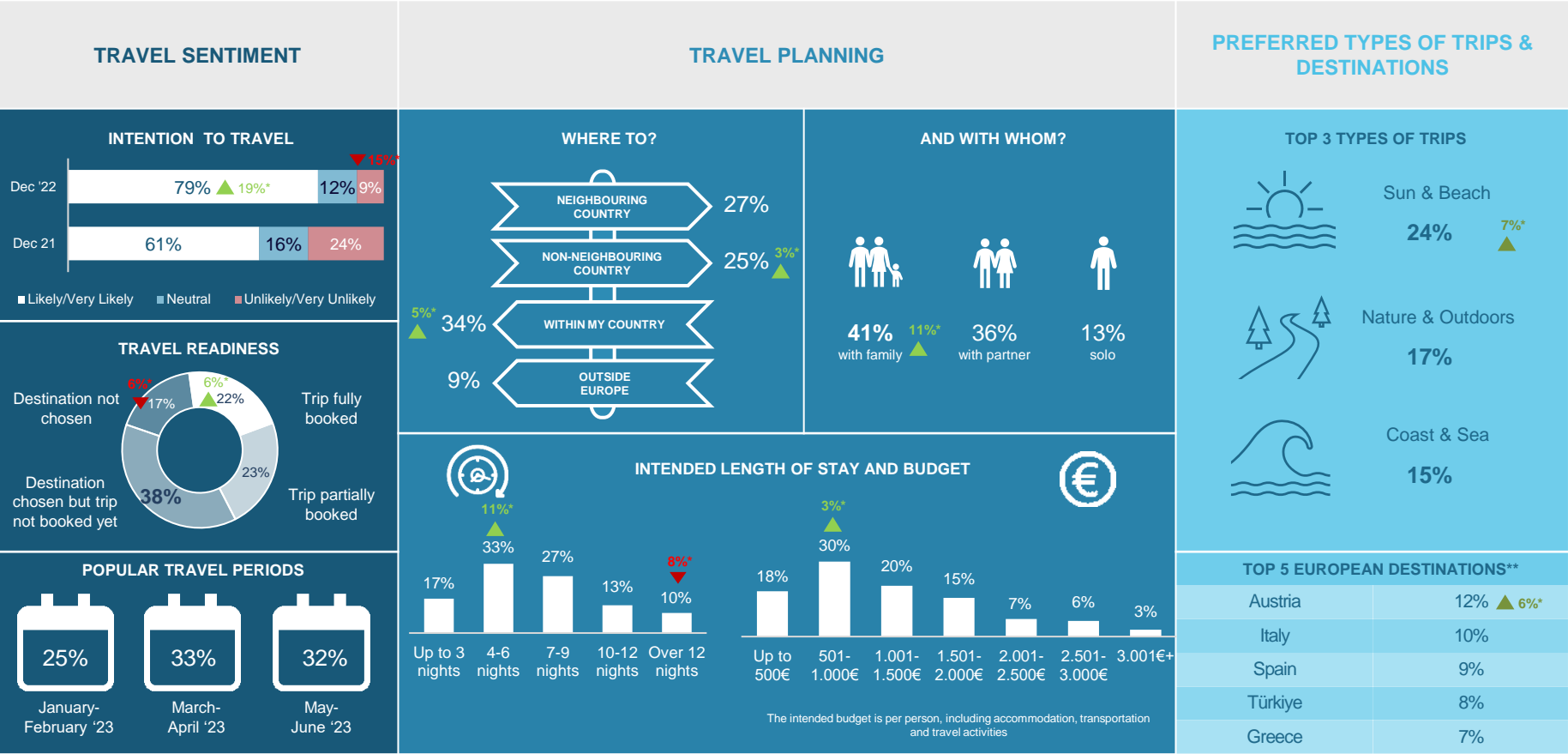
# EUROPEANS' PREFERENCES FOR TRIP TYPES AND EXPERIENCES

Travel horizon: January-June 2023

	 Sun & Beach	 City Break	 Culture & Heritage	 Nature & Outdoors
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	<div><div>25%</div><div>&gt;55</div></div> <div><div>23%</div><div>35-44</div></div>	<div><div>26%</div><div>25-34</div></div> <div><div>22%</div><div>35-44</div></div>	<div><div>38%</div><div>&gt;55</div></div> <div><div>21%</div><div>45-54</div></div>	<div><div>26%</div><div>&gt;55</div></div> <div><div>23%</div><div>35-44</div></div>
MOST COMMON LENGTH OF STAY & BUDGET	<div><div>37%</div><div>7-9 nights</div></div> <div><div>29%</div><div>500-1000 €</div></div> <div><div>26%</div><div>4-6 nights</div></div> <div><div>24%</div><div>1001-1500 €</div></div>	<div><div>45%</div><div>4-6 nights</div></div> <div><div>33%</div><div>500-1000 €</div></div> <div><div>37%</div><div>Up to 3 nights</div></div> <div><div>27%</div><div>Up to 500 €</div></div>	<div><div>48%</div><div>4-6 nights</div></div> <div><div>32%</div><div>500-1000 €</div></div> <div><div>22%</div><div>7-9 nights</div></div> <div><div>23%</div><div>1001-1500 €</div></div>	<div><div>41%</div><div>4-6 nights</div></div> <div><div>29%</div><div>500-1000 €</div></div> <div><div>23%</div><div>7-9 nights</div></div> <div><div>21%</div><div>Up to 500 €</div></div>
TOP 4 EXPERIENCES TO TRY	<div><div>19%</div>Enjoy natural landscapes</div> <div><div>18%</div>Gastronomic experiences</div> <div><div>14%</div>Dive into local culture</div> <div><div>14%</div>Sightseeing</div>	<div><div>21%</div>Sightseeing</div> <div><div>17%</div>Dive into local culture</div> <div><div>16%</div>Enjoy natural landscapes</div> <div><div>15%</div>Gastronomic experiences</div>	<div><div>22%</div>Learn about history</div> <div><div>19%</div>Dive into local culture</div> <div><div>17%</div>Sightseeing</div> <div><div>15%</div>Gastronomic experiences</div>	<div><div>28%</div>Enjoy natural landscapes</div> <div><div>16%</div>Gastronomic experiences</div> <div><div>15%</div>Dive into local culture</div> <div><div>12%</div>Active holiday experiences</div>

# A SNAPSHOT OF GERMAN TRAVEL PLANS

Travel horizon: January-June 2023



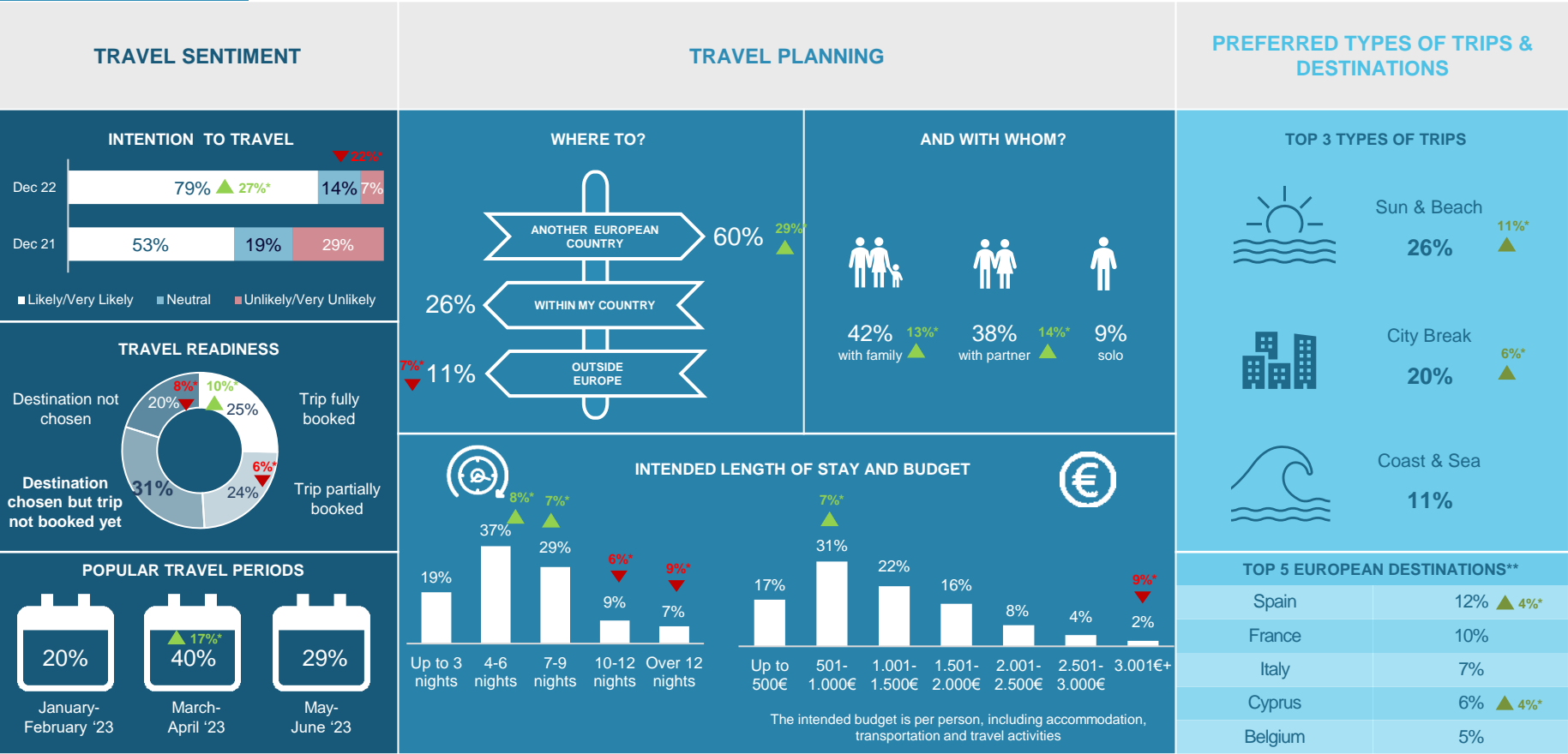
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 2023



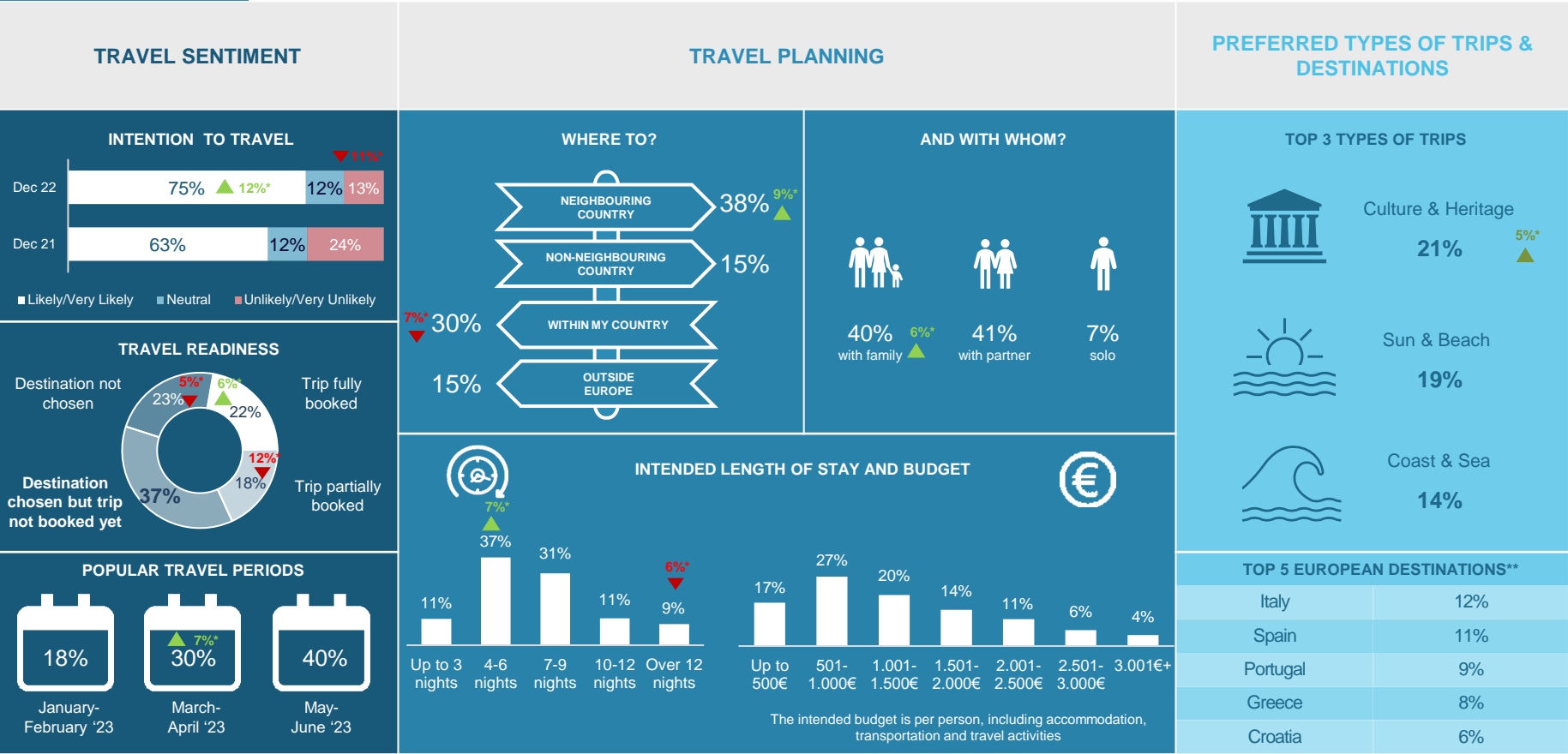
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 2023



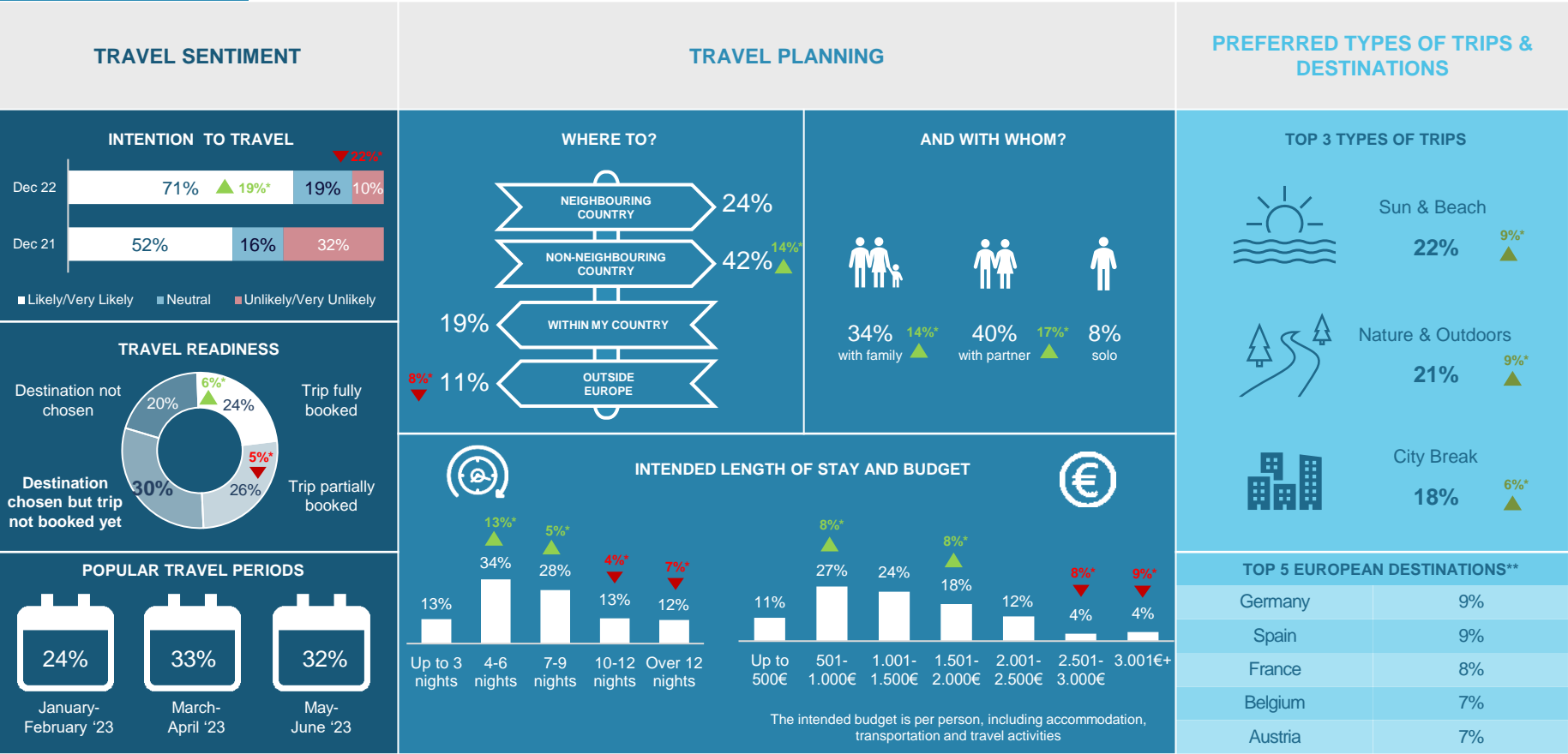
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 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)

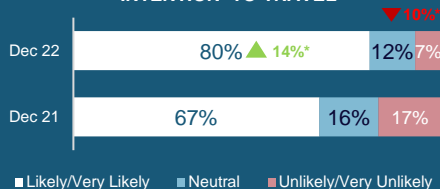
# A SNAPSHOT OF ITALIAN TRAVEL PLANS

Travel horizon: January-June 2023

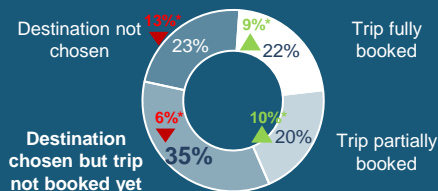


## TRAVEL SENTIMENT

### INTENTION TO TRAVEL



### TRAVEL READINESS

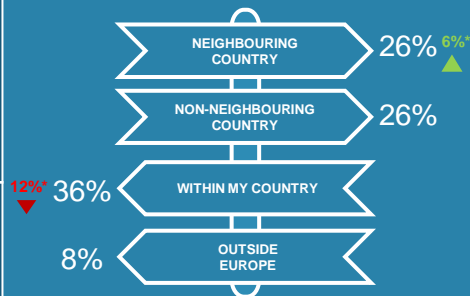


### POPULAR TRAVEL PERIODS

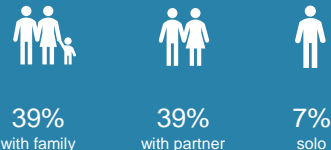


## TRAVEL PLANNING

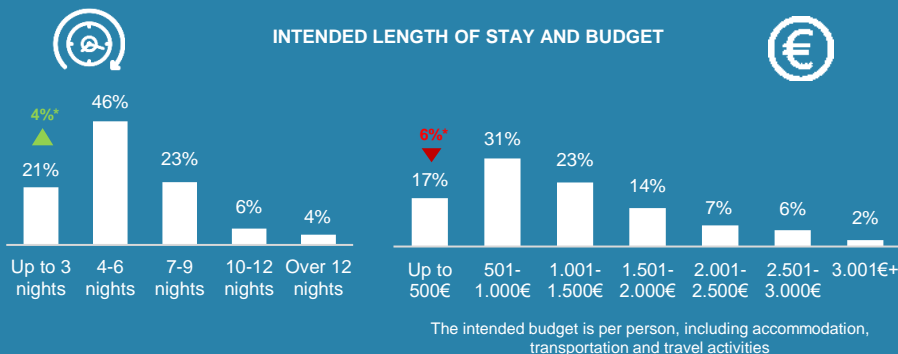
### WHERE TO?



### AND WITH WHOM?



### INTENDED LENGTH OF STAY AND BUDGET



## PREFERRED TYPES OF TRIPS & DESTINATIONS

### TOP 3 TYPES OF TRIPS



### TOP 5 EUROPEAN DESTINATIONS\*\*

France	13%
Spain	12% ▲ 4%*
Germany	7%
Austria	7%
UK	7%

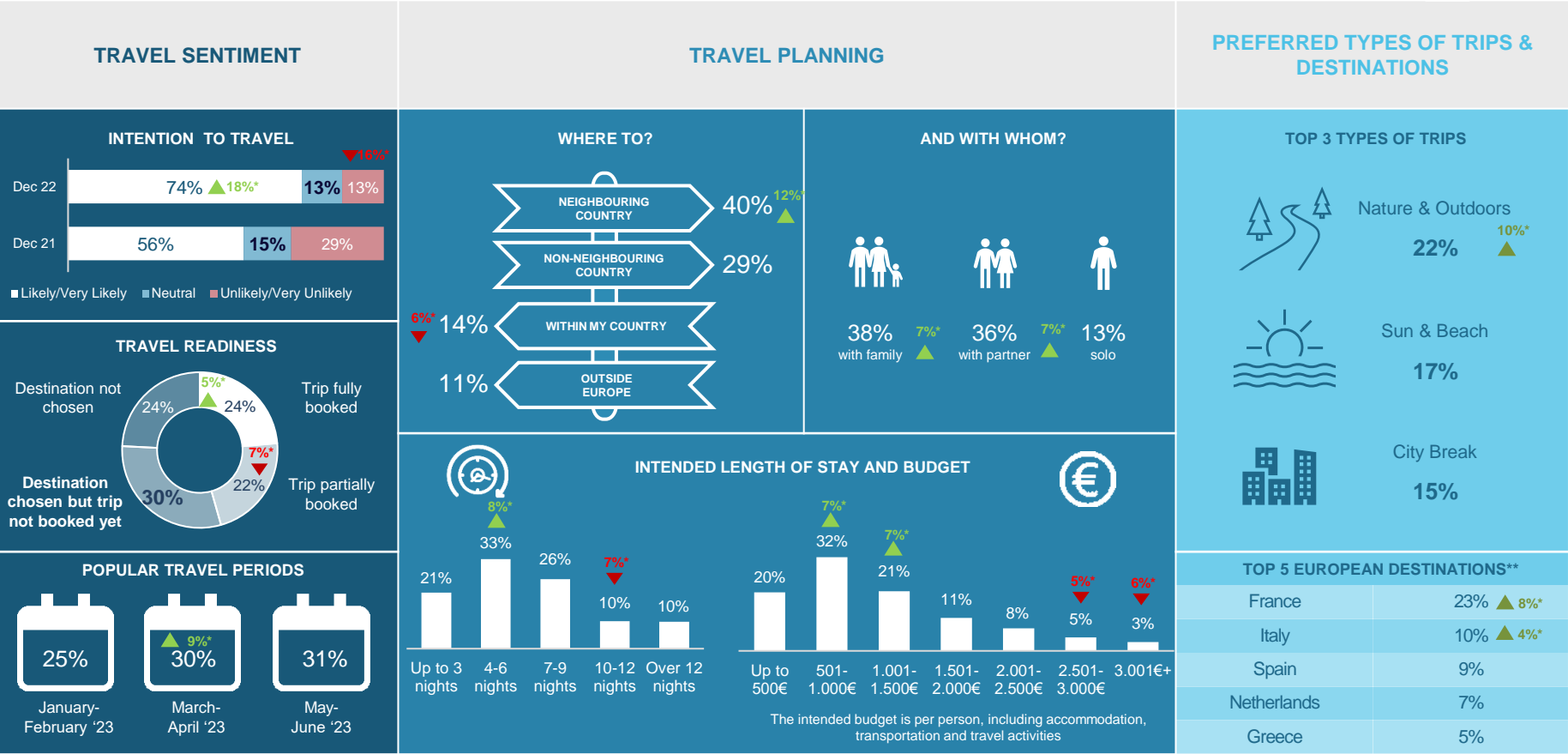
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 2023



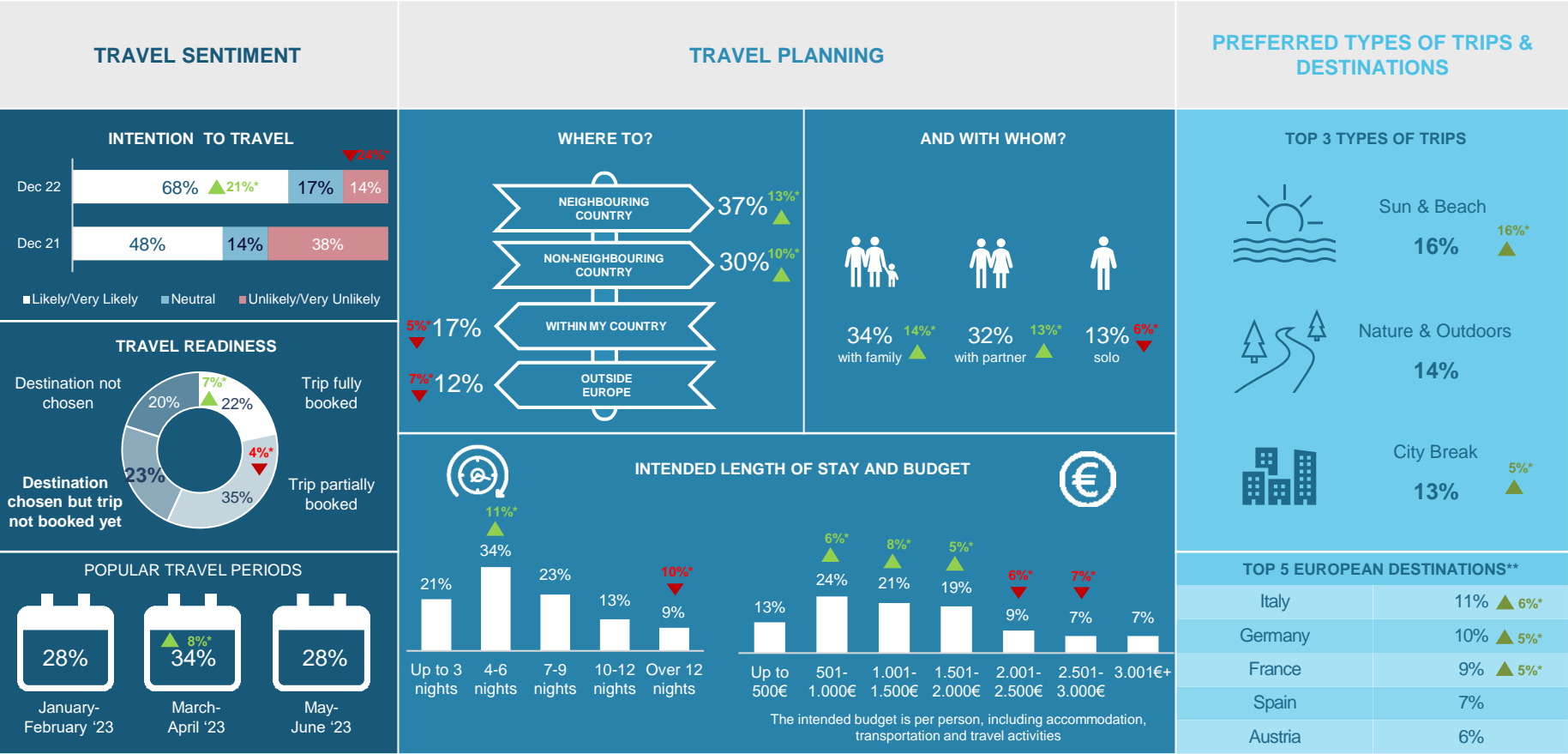
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 2023



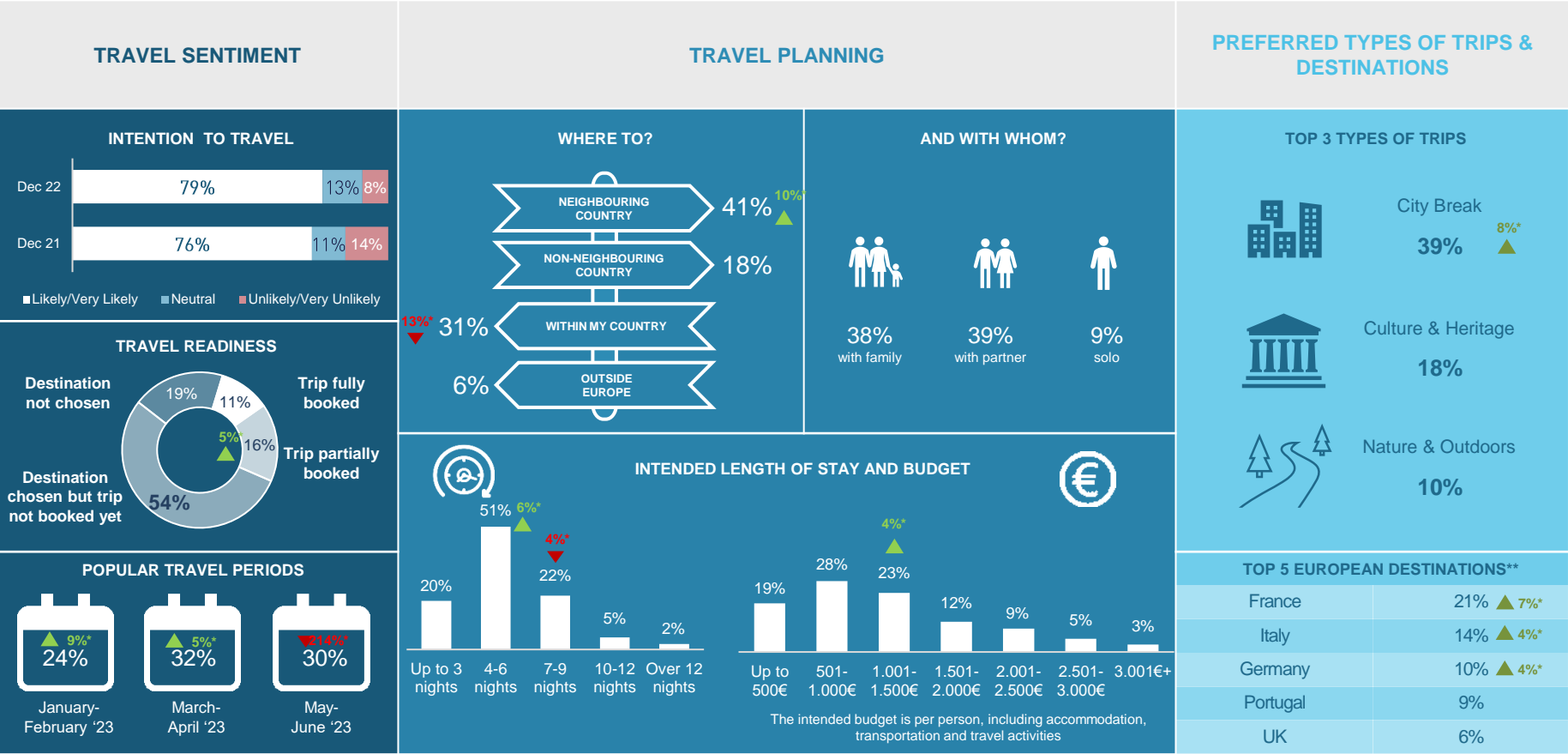
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 2023



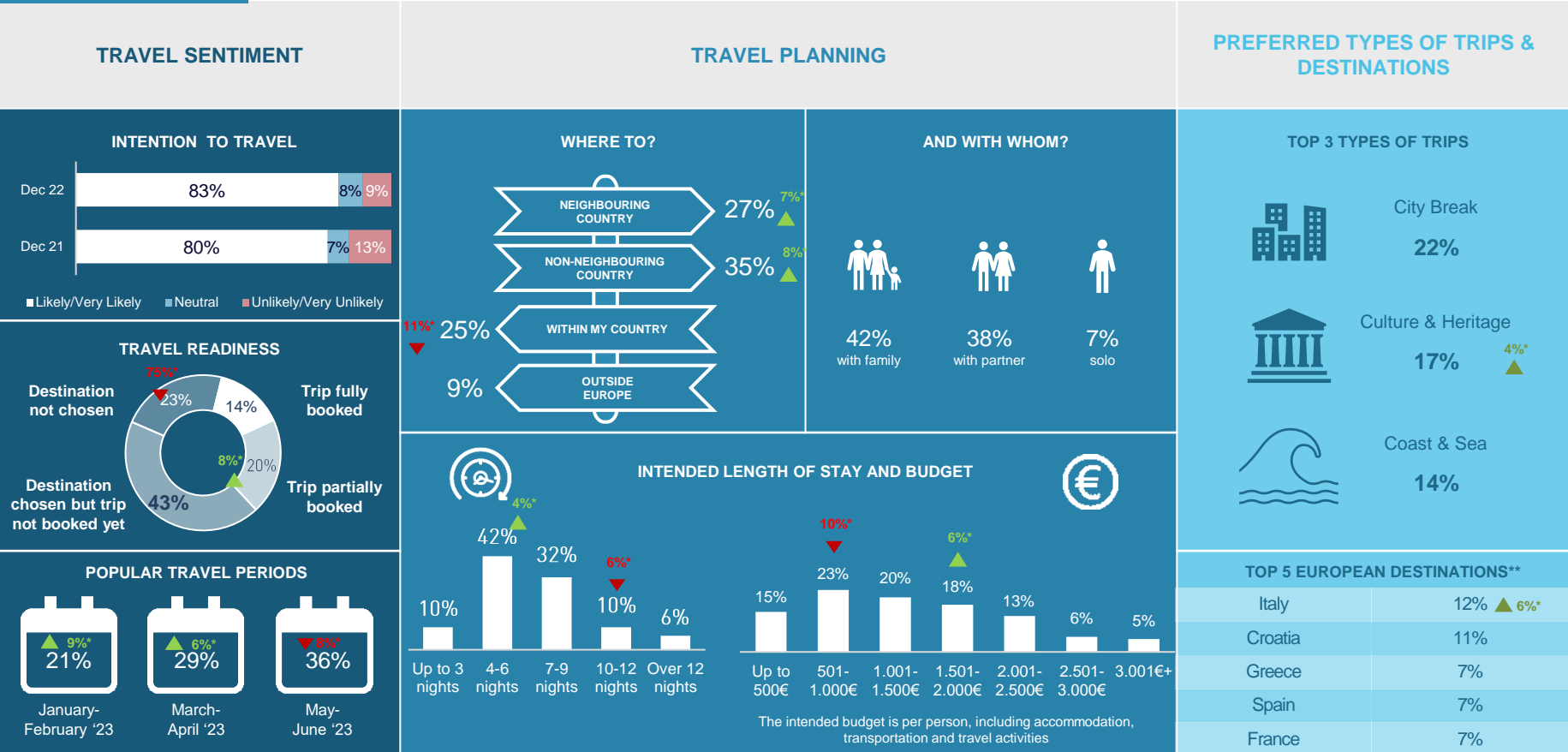
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 2023



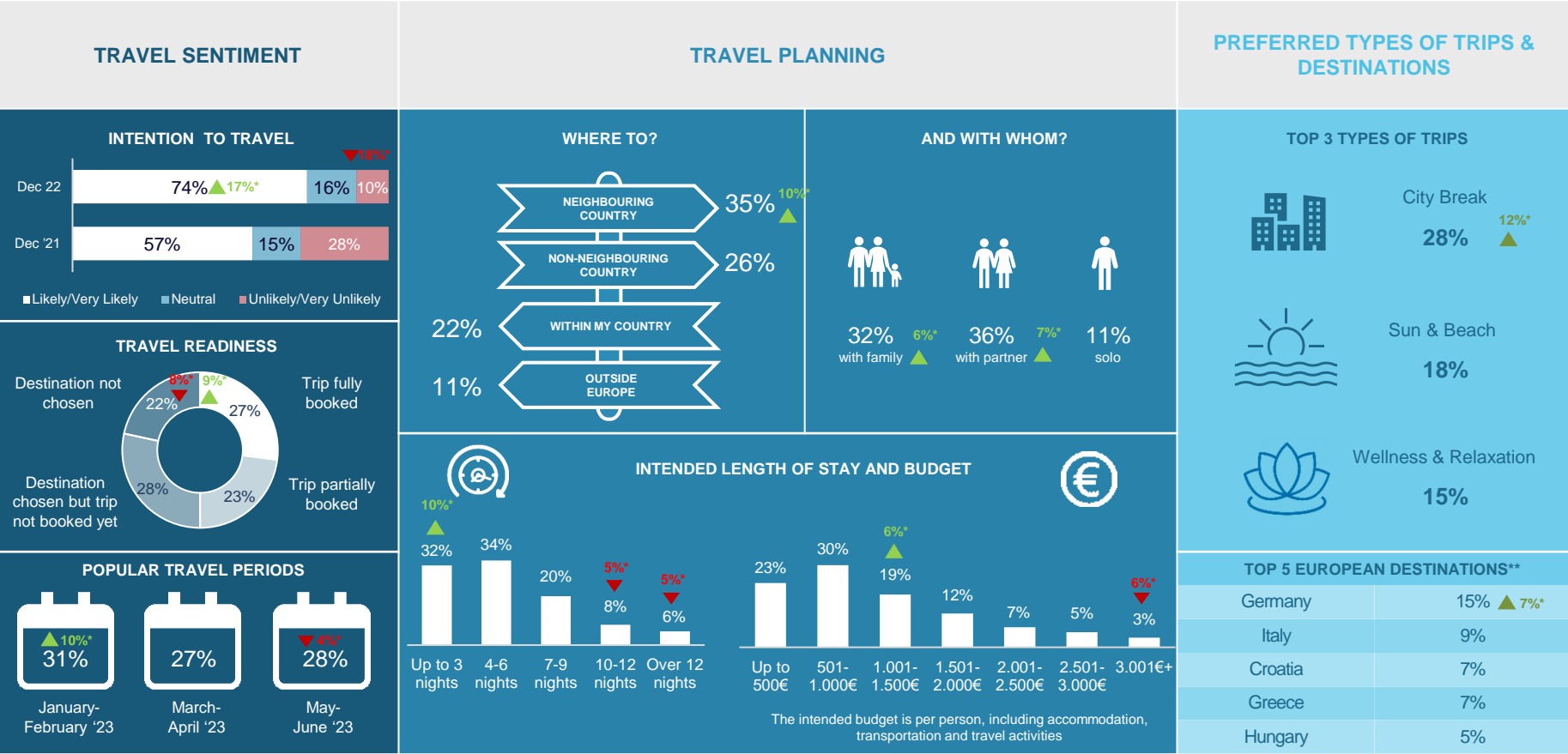
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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: January-June 2023



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

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

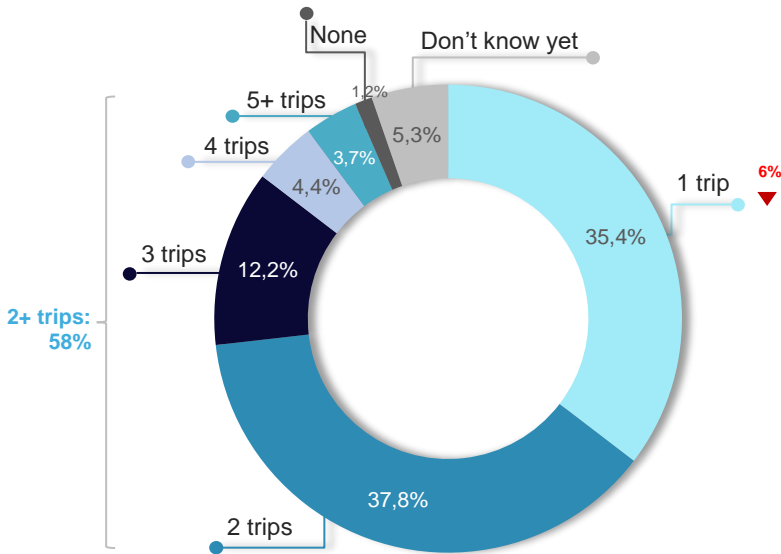
No. of respondents: 501 (total sample of respondents per country)

# TRIP PLANNING

02

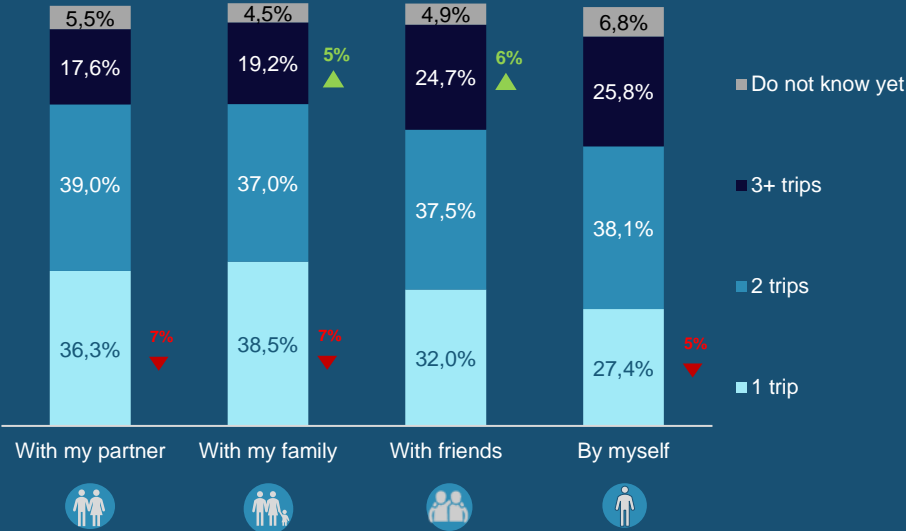
Most Europeans will take multiple trips in the first half of 2023;  
Solo travellers are the most likely to travel more frequently

Number of intended trips within Europe in the next 6 months



Dec '22 survey

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



# The share of Europeans planning to fly to their next destination increases gradually, reaching new heights

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



**Spain**

73.7%

14%\* ▲



**France**

61.6%

11%\* ▲



**Italy**

68.3%

11%\* ▲



**Poland**

56.3%

9%\* ▲

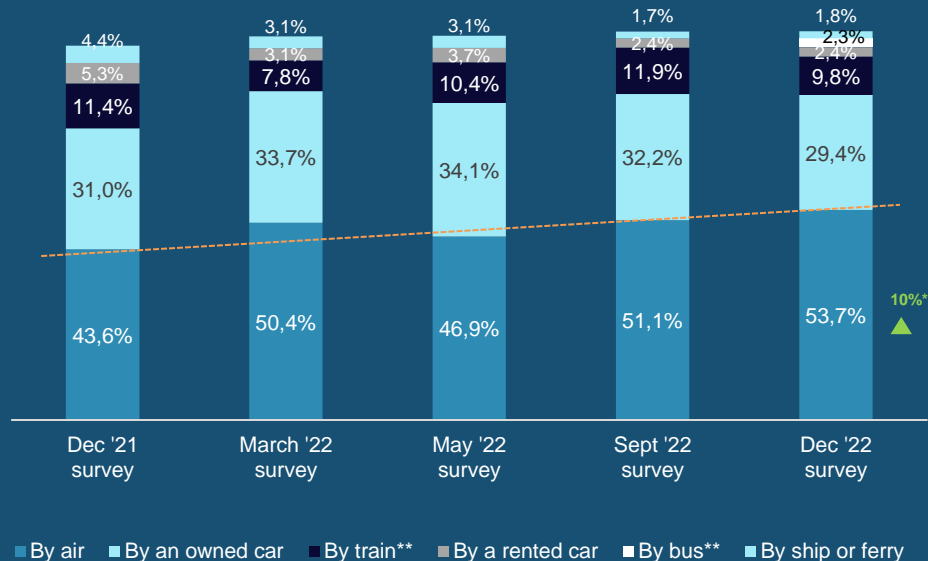


**UK**

68.2%

22%\* ▲

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



Q14. 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 (December 2021)

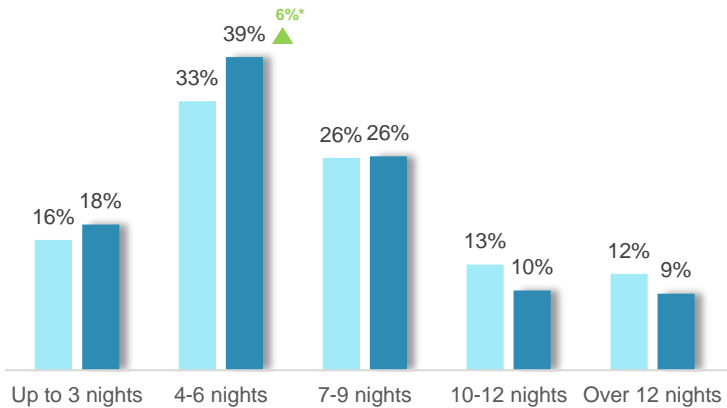
\*\*Up to September '22, 'By train/bus' was recorded as one answer

No. of respondents: 4,606

# Despite economic concerns, Europeans expect to spend the same time and budget on holidays as last year

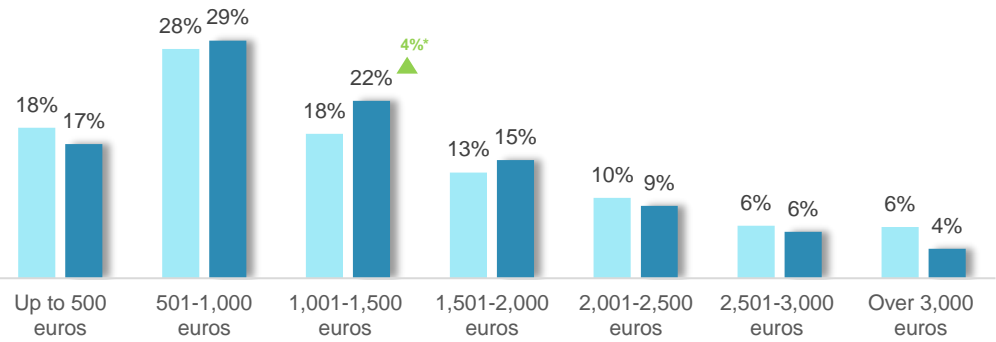


Intended length of stay (nights)



Envisaged budget

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



■ Dec '21 survey   ■ Dec '22 survey

## LOOKING FOR THE BIG SPENDERS?

35% of Sun & Beach travellers will spend over 1,500 euros on their next holiday, vs. 29% among Nature & Outdoors and 21% among City Break travellers

## MORE NIGHTS AND HIGHER BUDGETS

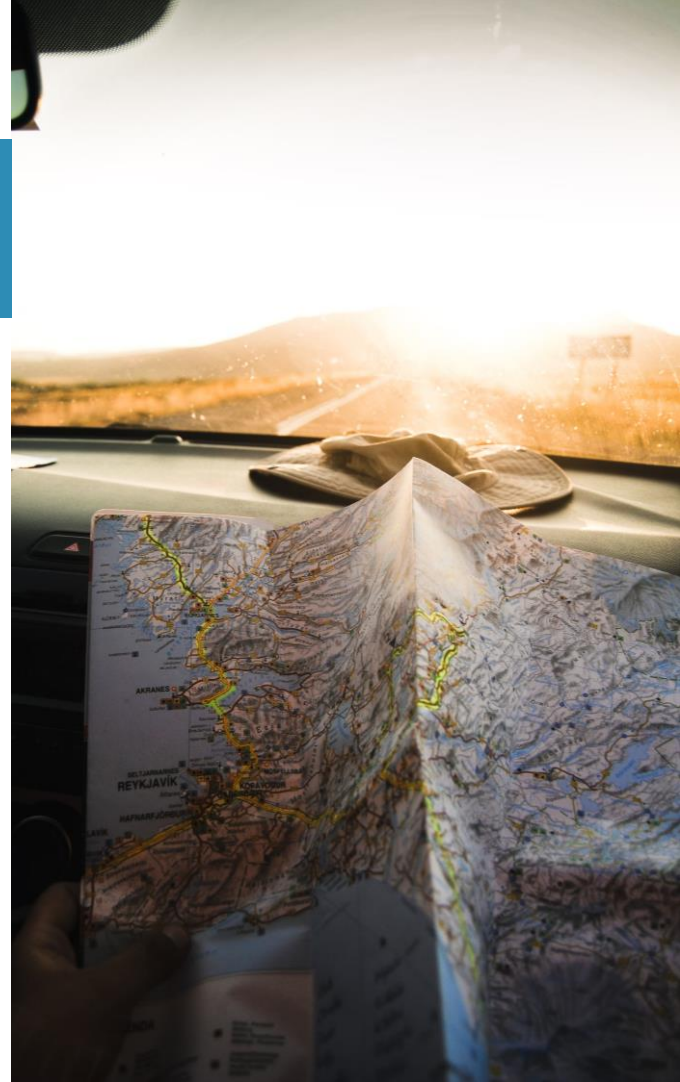
For Europeans who intend to take longer trips, the planned budget increases proportionally

### Budget allocation by trip length

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

	< 3 nights	4-6 nights	7-9 nights
< 500 euros	43%	15%	8%
501 - 1,000 euros	36%	35%	26%
1,001 - 1,500 euros	12%	24%	25%
1,501 - 2,000 euros	5%	15%	18%
2,001 - 2,500 euros	1%	7%	14%

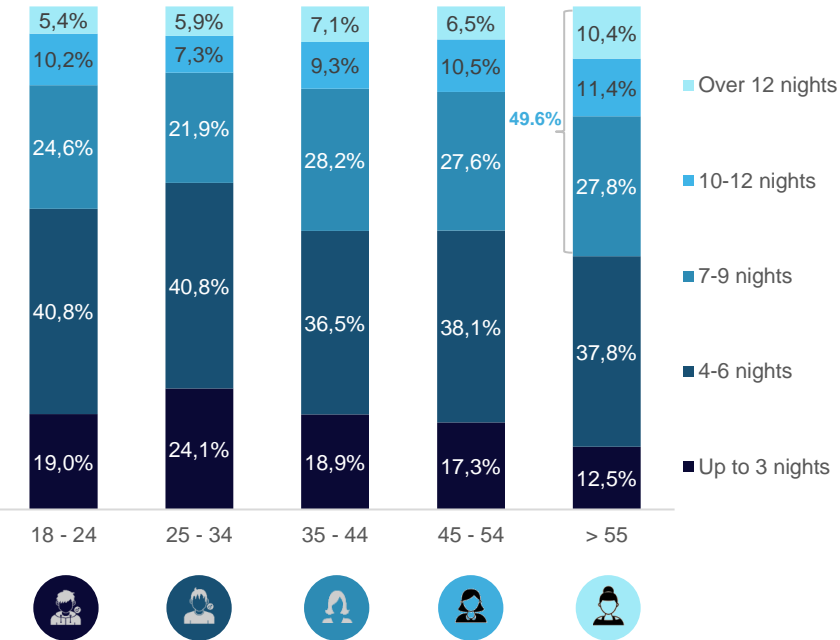
No. of respondents: 4,606



Among age groups, +54 year old Europeans are most likely to take longer holidays and to set aside a budget of over 2,000 euros

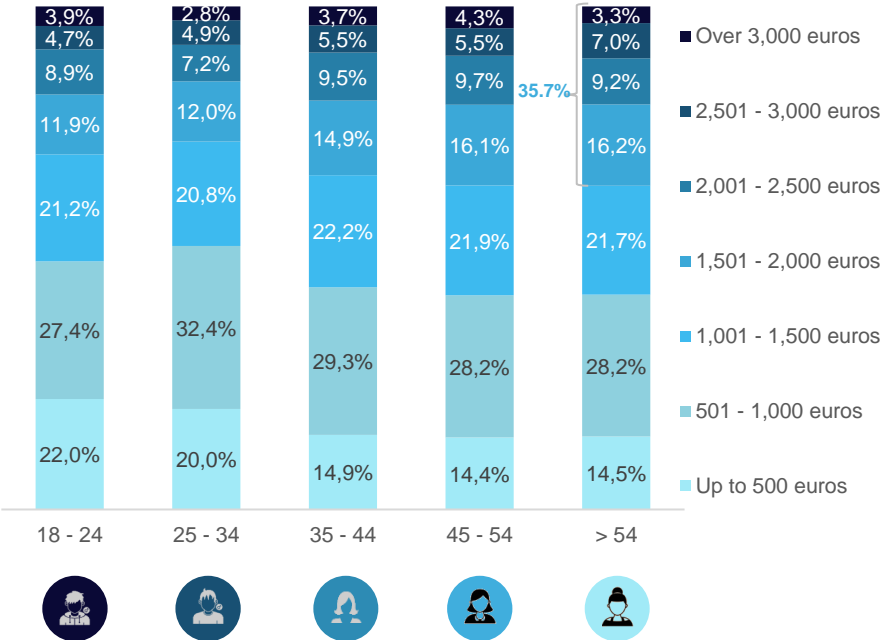


Intended length of stay (nights)



Envisaged budget

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

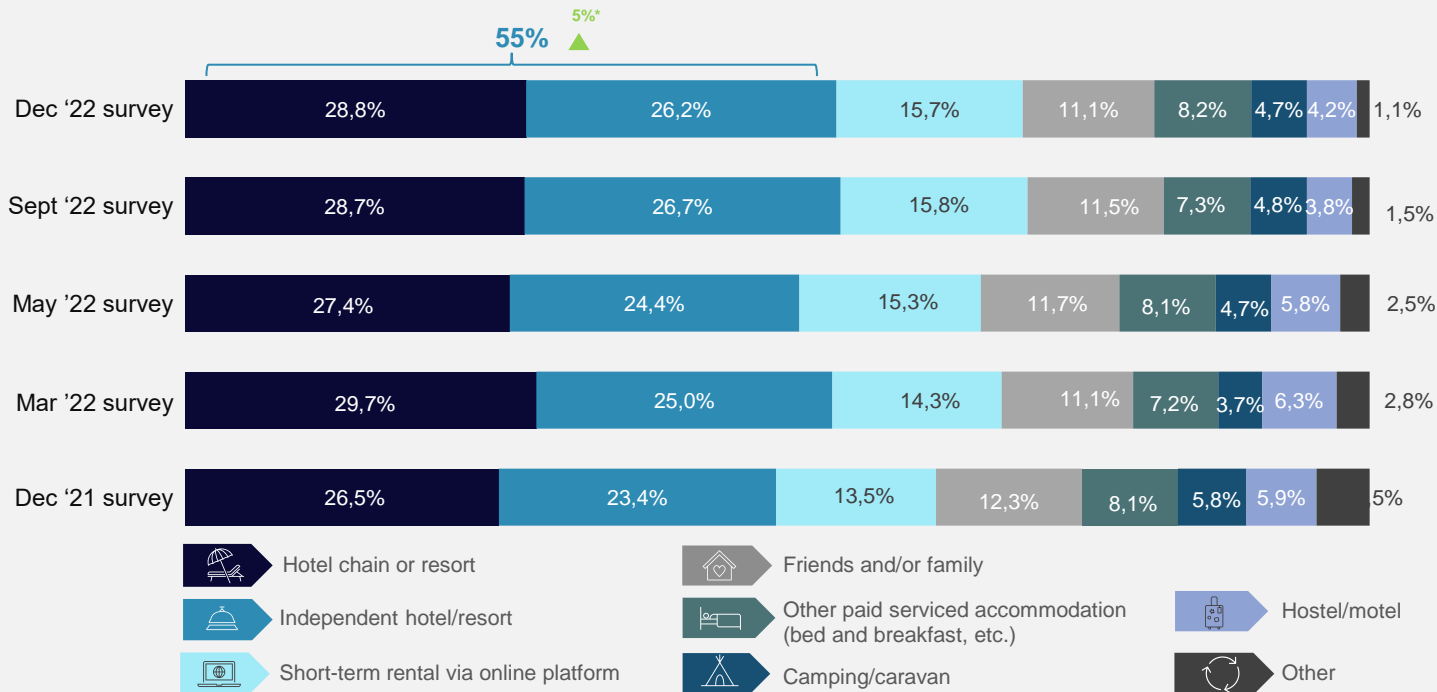


Q18. What would be the length of your next overnight trip?

Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

## An increasing number of Europeans plan to stay in a hotel during their next trip; short-term rental accommodations are the second most preferred option

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

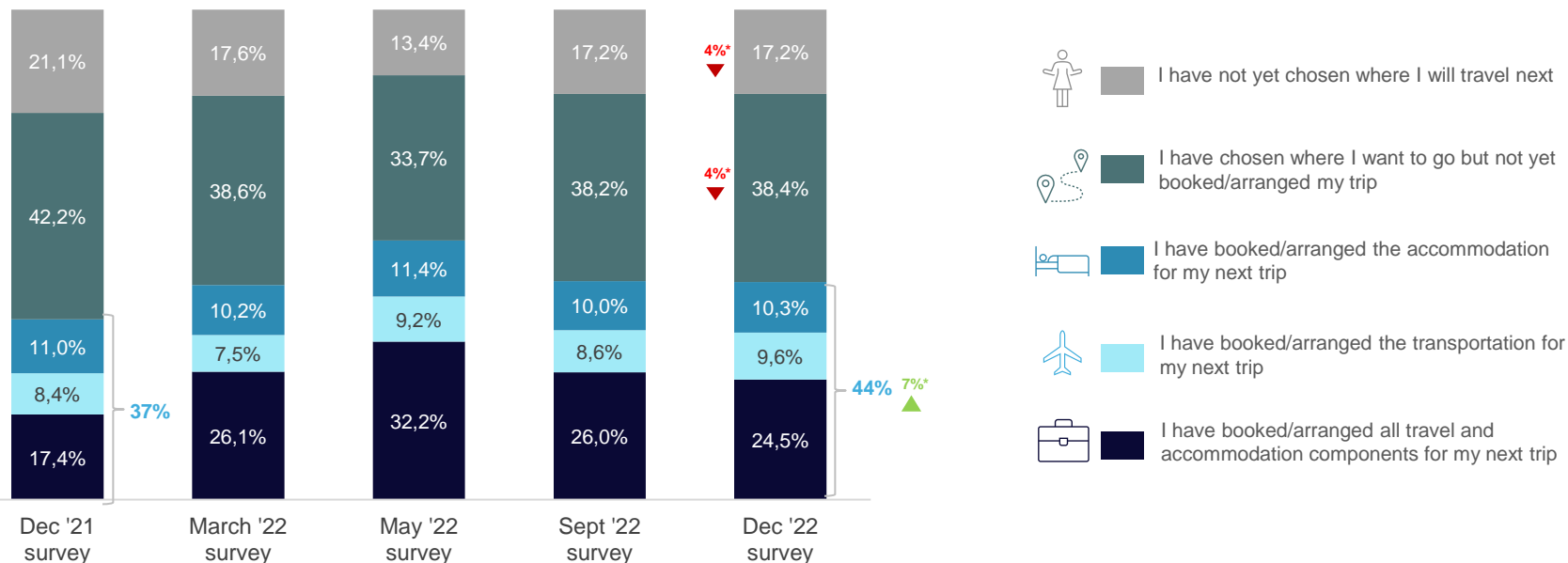


Gen Z Europeans (18-24 years old) are more likely to stay in short-term rentals (17%) and hostels (8%), and are less likely to favour hotels (47%)

## The share of Europeans who have fully/partially booked their next trip (44%) has increased by 7% compared to a year ago

Results reflect improved travel confidence and a potential desire to reduce overall travel costs by purchasing early-bird deals.

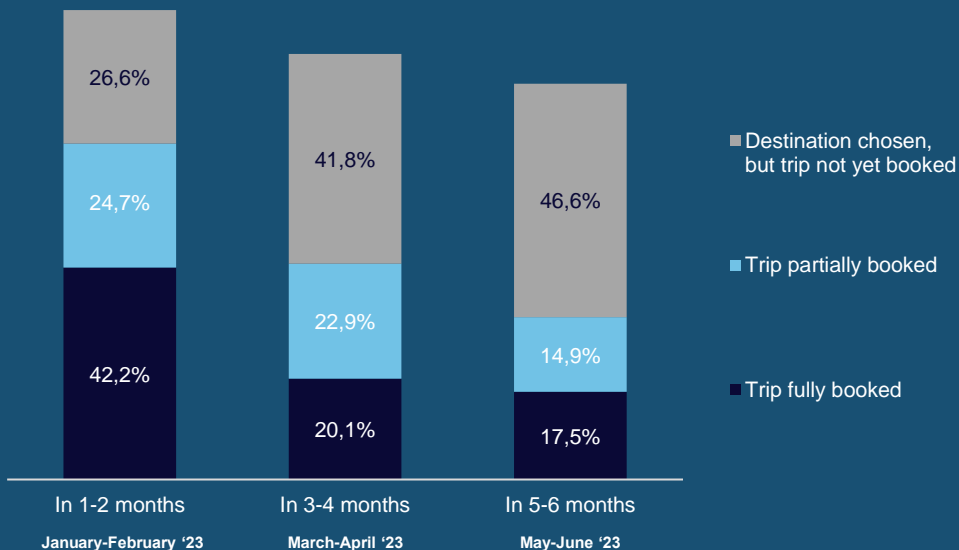
### Status of planning for the next trip



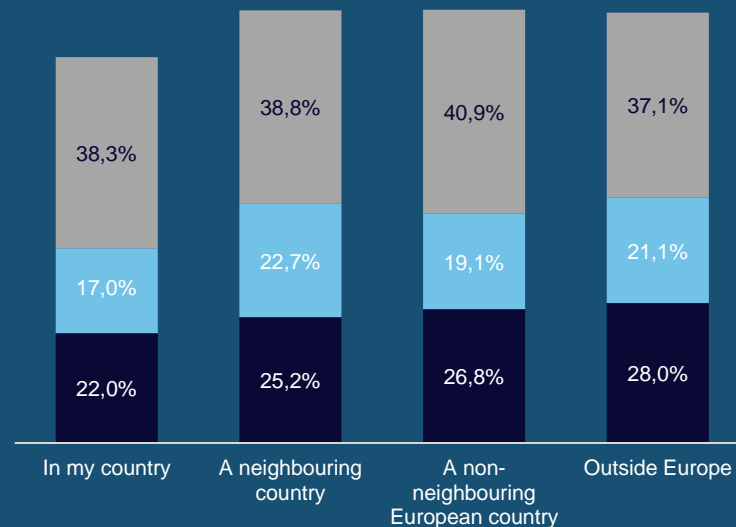
## 47% of Europeans have chosen their early summer destination but have not yet booked; The share of fully booked trips is the lowest among Europeans who plan domestic holidays



Booking status  
and timing of next trip



Booking status  
and travel destination



Dec '22 survey

## Friendly and welcoming locals are now the third most important factor in choosing a destination, after the ever-popular good weather and attractive bargains & deals

Top 8 criteria for choosing the next travel destination (Dec '22 survey)



Bargains & attractive deals is the no.1 criterion for domestic travellers, being considered by 41% of them, vs. 35% among travellers planning a non-domestic trip in Europe

A blue-tinted photograph of a smiling couple standing in a park. The man is on the left, wearing a denim shirt, and the woman is on the right, wearing a denim jacket. They are both looking towards the right. In the background, there is a large, ornate fountain with multiple tiers and water spraying upwards. The scene is set in a park with trees and a path visible in the distance.

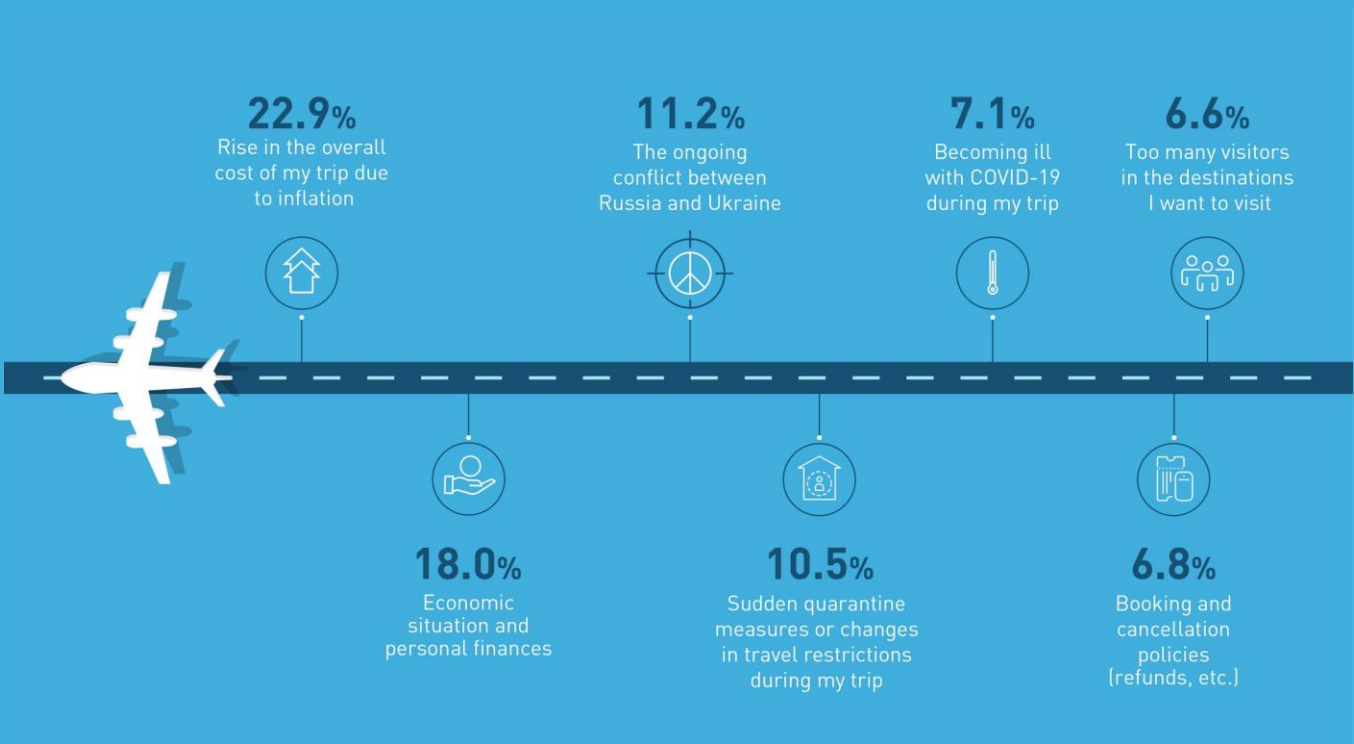
# TRAVEL CONCERNS

03

# EUROPEAN TRAVELLERS' CONCERNS

For 23% of Europeans, increased travel costs are a primary source of concern, while 18% are mainly worried about their financial situation

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

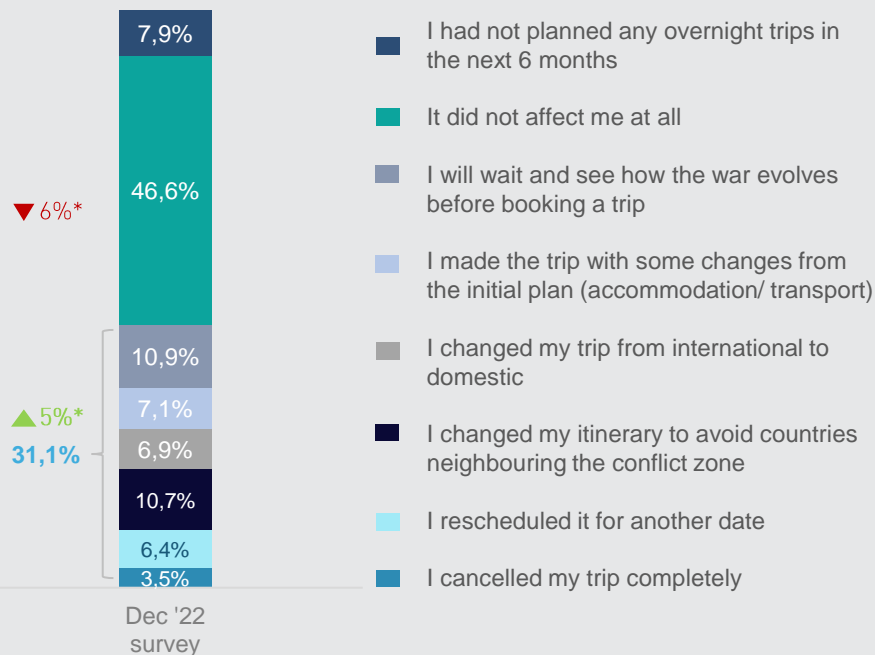


Top 4 markets concerned with rising travel costs	Top 4 markets concerned with personal finances
Austria 25%	Belgium 22%
Spain 25%	Germany 20%
Poland 24.4%	Spain 19%
Belgium 24%	Poland 19%

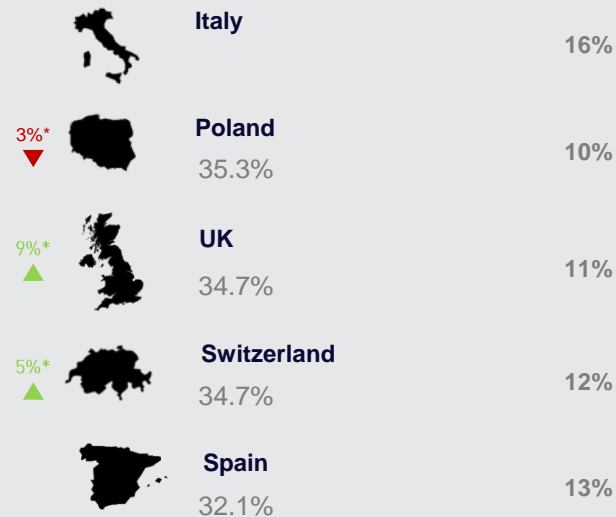
Top travel concerns are shared equally by Europeans of all age groups.

## Europeans remain cautious about the war in Ukraine: 31% of respondents will make changes to their upcoming trip due to the conflict

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



### Top 5 markets to change their trip planning



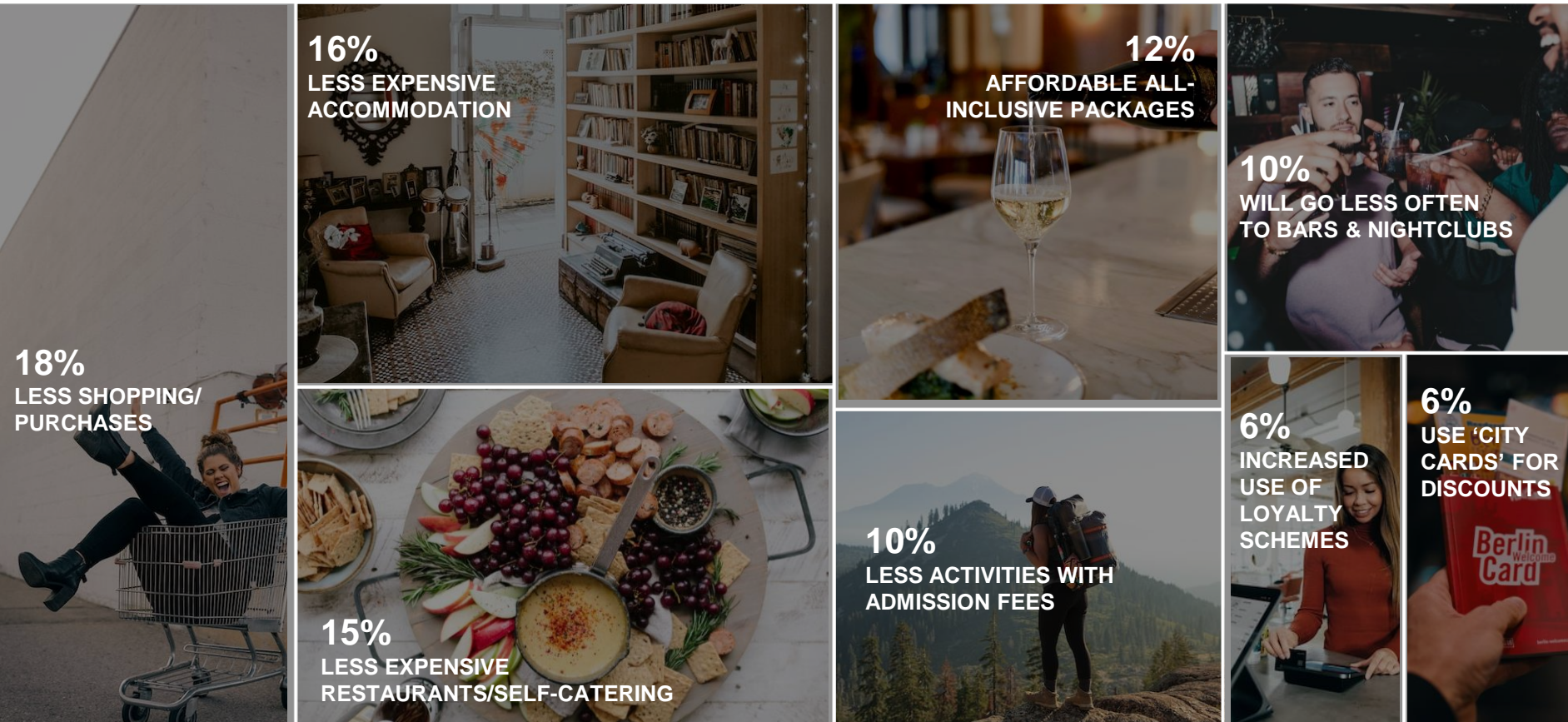
### Most often mentioned type of change:

'I changed my itinerary to avoid countries neighbouring the conflict zone'

\* Statistically significant difference vs the previous wave (September 2022)

\* The question was introduced in May 2022 No. of respondents: 6,000

# HOW WILL EUROPEANS ADAPT TO THE ECONOMIC CHALLENGES WHILE TRAVELLING?

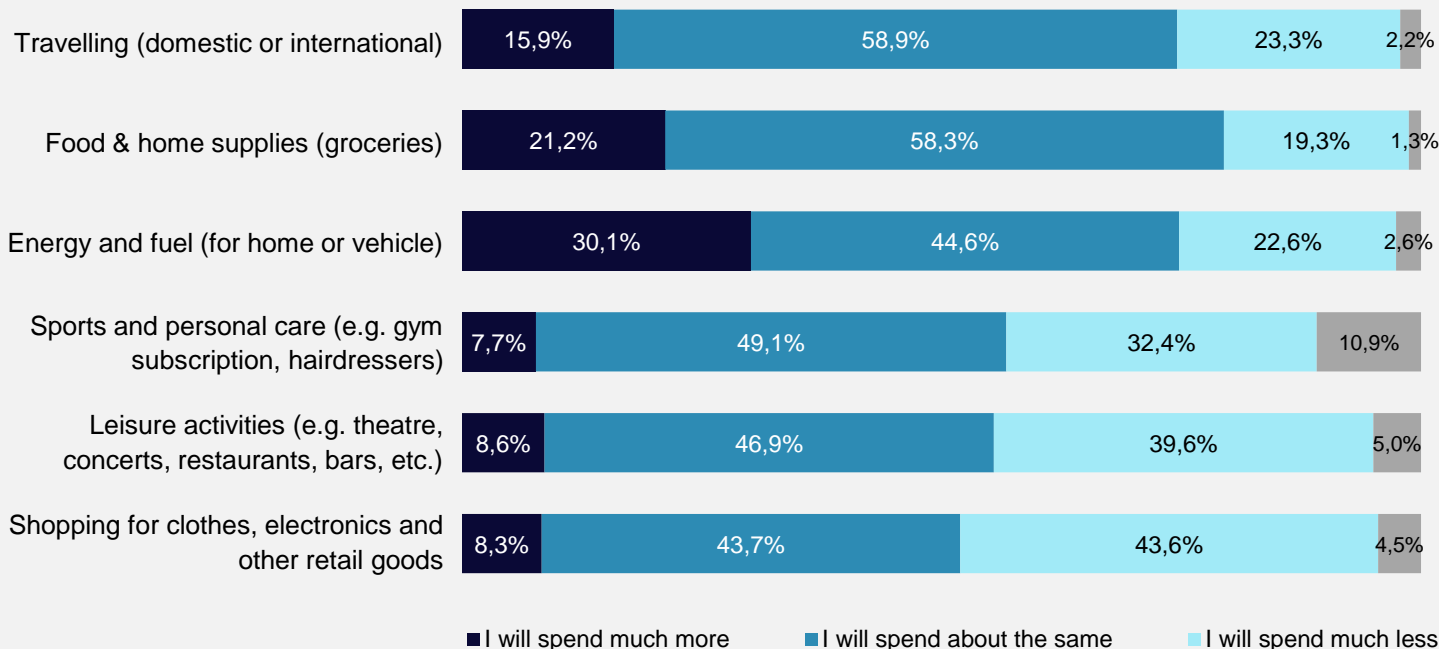


Q20. In the context of inflation and rising costs of travel, which of the following travel behaviours are you most likely to adopt during your next vacation?

No. of respondents: 4,606

## 59% of Europeans plan to spend the same as usual on travel in the first half of 2023 - demonstrating a strong resilience compared to other spending categories

### Anticipated changes in spending on traveling, in the coming six months



**Gen Z is ready to splurge**  
21% of Gen Z travellers (aged 18-24) plan to increase their travel budget, compared to an average of 15% among Europeans in other age groups.



# 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 (2020-2022)
- Distribution/data collection period:
  - **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 / **Wave 14:** 15-29 December 2022; sample = 6,000
  - **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 (8 questions), and Travel intentions, preferences and trip planning (13 questions)
- 46% of the Wave 13 survey respondents are male and 54% 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	70	44	100	96	92	56	120	62	99	827
	25 - 34	136	112	73	133	128	152	106	103	119	147	1,209
	35 - 44	126	134	103	1114	140	150	120	105	130	128	1,250
	45 - 54	138	168	105	87	146	168	92	91	111	74	1,180
	≥55	262	266	175	66	240	188	126	81	78	52	1,534
Total		750	750	500	500	750	750	500	500	500	500	6,000

## 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 eliminate every margin of error.

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Cover photo: Black cheerful happy couple in love visiting Paris city centre and Eiffel Tower - African American tourists travelling in Europe and dating outdoors

Photo ID: 2173930499

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