MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 15 | 04/23

EUROPEAN
TRAVEL
COMMISSION

Co-funded by the
European Union

WAVE 15 RESEARCH HIGHLIGHTS

TRAVEL INTENTIONS

This report monitors sentiment and short-term intentions for domestic and intra-European travel and is the **15th wave of a market research project**[1] which began in September 2020. Results are based on data collected in March 2023 from Europeans in 10 high-volume source markets.

- **72% of Europeans plan to travel between April - September 2023 (-5% compared to the same period in 2022).** A stronger sentiment is shared by Europeans over the age of 25 (74%), while, among younger travellers (18-24), 61% intend to take a trip during this period.
- **More Europeans are planning getaways this spring and early summer.** Almost 30% intend to take an overnight trip between April and May (up 6% from 2022). **40% consider travelling in June or July**, while only 23% expect to travel in August and September (down 9% from last year),
- **Travelling within Europe remains the top choice**: 30% of travellers plan to visit a neighbouring European country, and 28% are heading to a non-neighbouring one. At the same time, only 11% of respondents plan trips outside the region.
- **Europeans' preference for leisure travel (69%) falls by 7%,** compared to a year ago, while other reasons to travel gain ground. **Interest in business travel is slowly increasing** (+3% year on year).
- **Sun & Beach keeps its top spot as Europeans' most preferred type of leisure trip (19%)**, followed by City Break (15%) and Culture & Heritage (14%).

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[1] The data collection and research methodology are detailed in the methodological annex (slide 42)

WAVE 15 RESEARCH HIGHLIGHTS

TRIP PLANNING

- **59% of Europeans plan to take multiple trips by September 2023.** This trend is led by solo travellers, with 34% planning at least 3 trips (+8% compared to a year ago).
- The percentage of **Europeans who prefer to use public transportation** (train or bus) on their next trip has **increased to 14%, up 6% from a year ago**. Meanwhile, driving own car (26%) has dropped to its lowest level since the start of this research. The normalisation of travel behaviour post-COVID-19 could be a possible factor behind this change, resulting in a wider range of available and preferred transportation modes.
- 35% of Europeans plan trips of 4-to-6 nights with an average budget of 501-1,000 euros. The share of **those planning to spend more than 1,500 euros has increased by 7% compared to 2022**, reaching 37%. Among age groups, mature travellers (aged 54+) show a stronger interest in longer and more expensive trips.
- **52% of Europeans have already fully or partially booked their next trip** (up 8% from 2022) - a sign of growing consumer confidence. Data shows that a larger share of bookings (53%) are being made for intra-European trips compared to domestic travel (45%).
- **Pleasant weather conditions (18%)** and **attractive deals (17%) top Europeans' criteria** for choosing a destination, while the **preference for uncrowded destinations** climbs to third place (11%).

WAVE 15

RESEARCH HIGHLIGHTS

- For the next months**, 50% of Europeans** plan to maintain their regular travel budget, while a considerable **19%** plan **to invest more than usual.**
- Nevertheless, people remain concerned about the **increased travel costs (24%)** and **their personal finances (17%)**
- Efforts to keep travel expenses within the disposable budget include spending less on **shopping** (17%), choosing cheaper **accommodation** (16%) and opting for **less expensive restaurants** or **self-catering** (15%) at the destination.
- Erratic weather and one of the warmest European winters on record have made an impact – **uneasiness about extreme weather events climbs to the sixth place of travel concerns (7%)**.
- **The war in Ukraine is still a worry,** impacting trip-related decisions of half of the European travellers (+4% on last year).

WAVE 15

RECOMMENDATIONS FOR DESTINATIONS

- As **3 in 5 Europeans plan to take multiple trips by September 2023**, destinations could target Europeans planning their second or third summer trip with **multi-wave marketing campaigns.** These could run to the end of the season.
- **Destinations focusing on high-value segments could target travellers over the age of 54** by highlighting tourism products that allow **indulging in natural landscapes, savouring local cuisine and relishing culture**. Trips for this demographic group are more likely to be longer and more expensive – 24% plan to spend over 2,000 euros per person on their next trip.
- As the preference for uncrowded destinations rises (especially for Nature & Outdoors and City Break travellers), **second-tier cities and more remote natural areas can leverage their position.** They could be marketed as 'hidden gems', offering authentic, off-the-beaten-path experiences.
- Europeans' increasing concerns about inflation and personal finances create an opportunity for more affordable destinations **to gain popularity and penetrate new segments by offering greater value for money**.

WAVE 15

RECOMMENDATIONS FOR BUSINESSES

- **Sentiment for business travel strengthens** (+3%) compared to 2022. **Hotels could now refocus on this segment** by getting back in touch with business customers. Offering coworking spaces for remote work and reintroducing loyalty programs for returning business customers could be attractive.
- **Immersion in the local culture is an important travel experience for Europeans.** Tourism businesses are encouraged to promote cultural activities such as crafts workshops, local cuisine cooking classes, and homestay experiences for both leisure and business travellers.
- **Europeans are less inclined to travel by private car** (-7% down from 2022). Transport businesses (e.g., car rentals, shared mobility, and transport apps) could now **offer tourists greener, easy-to-use and affordable alternatives for getting from A to B.**
- The percentage of Europeans who have fully or partially booked their next trip varies widely depending on the timing. For trips in April-May, 68% have already booked, while **only 40% have booked trips planned for August-September**. This presents an opportunity for airlines and hotels to **target the latter with attractive early-booking deals for the late summer months.**

CONTENTS

Reading the data

Wave 15

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

	Wave 11	Wave 12	Wave 13	Wave 14	Wave 15
Survey dates	1-9 March ‘22	9-12 May ‘22	13-23 Sept ‘22	15-29 Dec ‘22	1-7 March ‘23

2. **To present Wave 15 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:	April - May 2023
In 3-4 months:	June - July 2023
In 5-6 months:	August - September 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: 4,337
   - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,889

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 intention is strong, at 72%, despite a slight year-on-year decrease

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

Germany

79.6%

UK

82.8%

Spain

77.8%

6%* ▼

Italy

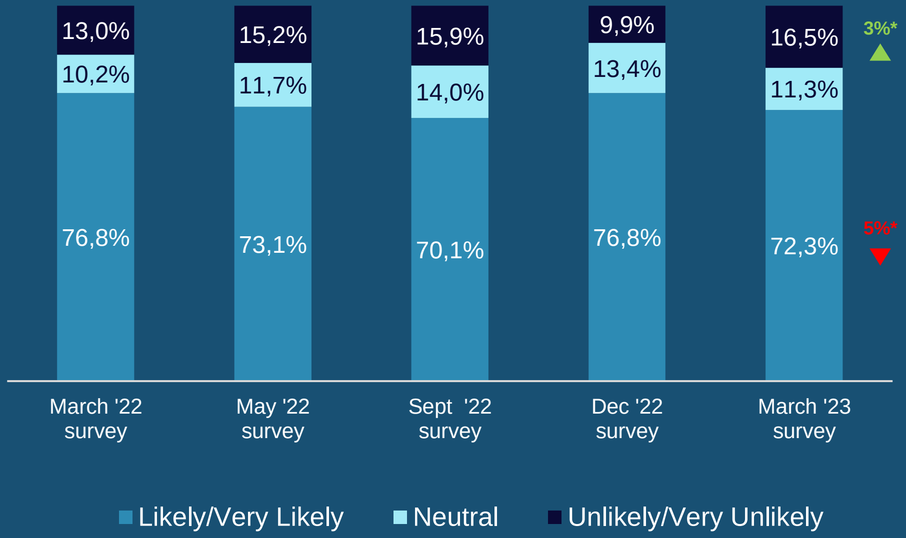
81.9%

Poland

77.0%

5%* ▼

Intention to travel in the next 6 months



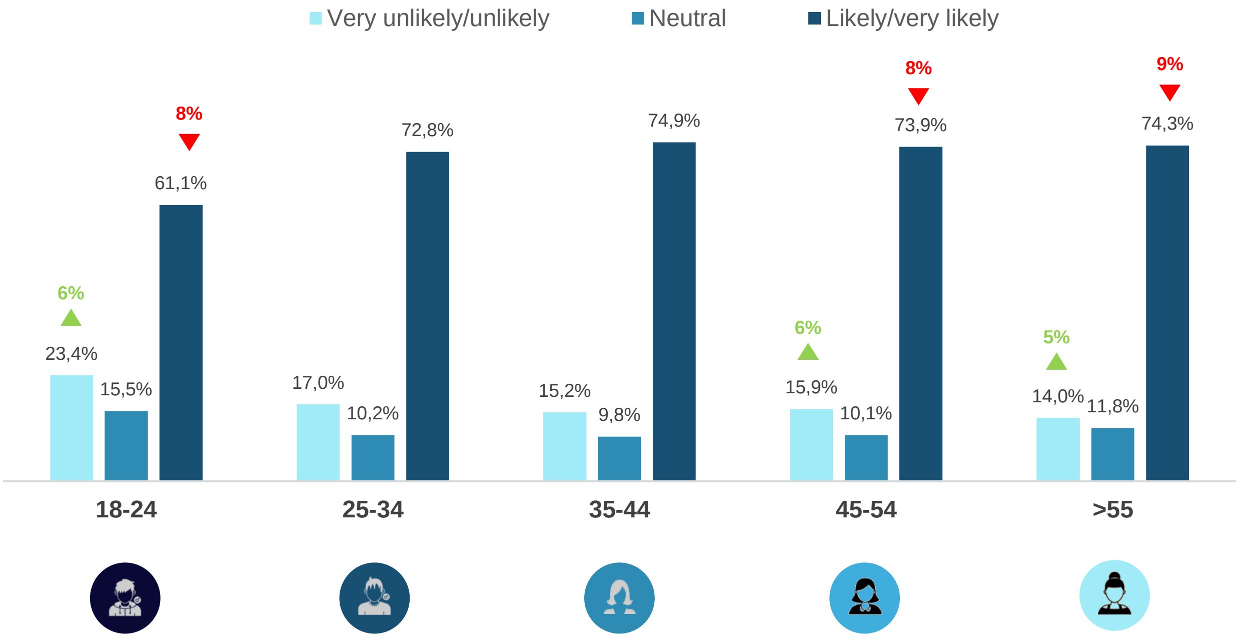
*Statistically significant difference vs a year ago (March 2022)

No. of respondents: 6,000

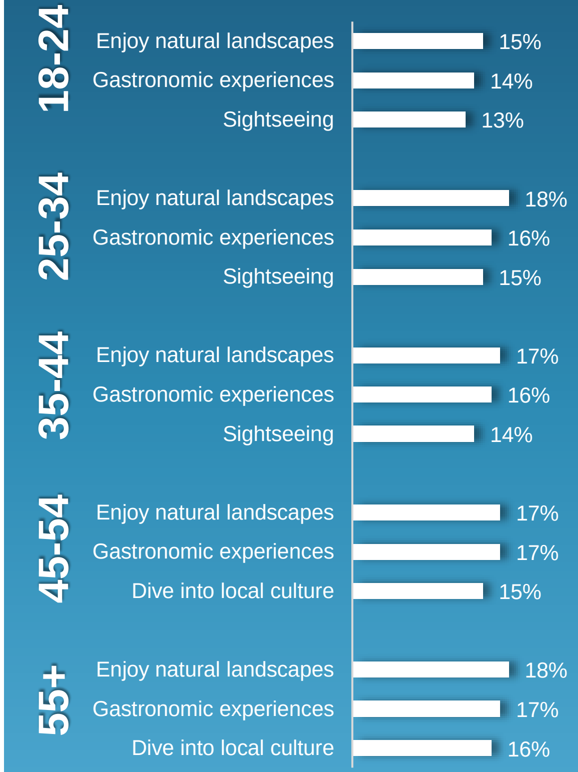
Q8. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

While Europeans over the age of 25 are brimming with wanderlust, the younger Gen Z crowd (18-24) remains more hesitant about travelling

Intention to travel in the next 6 months by age group



TOP TRAVEL EXPERIENCES BY AGE GROUP:



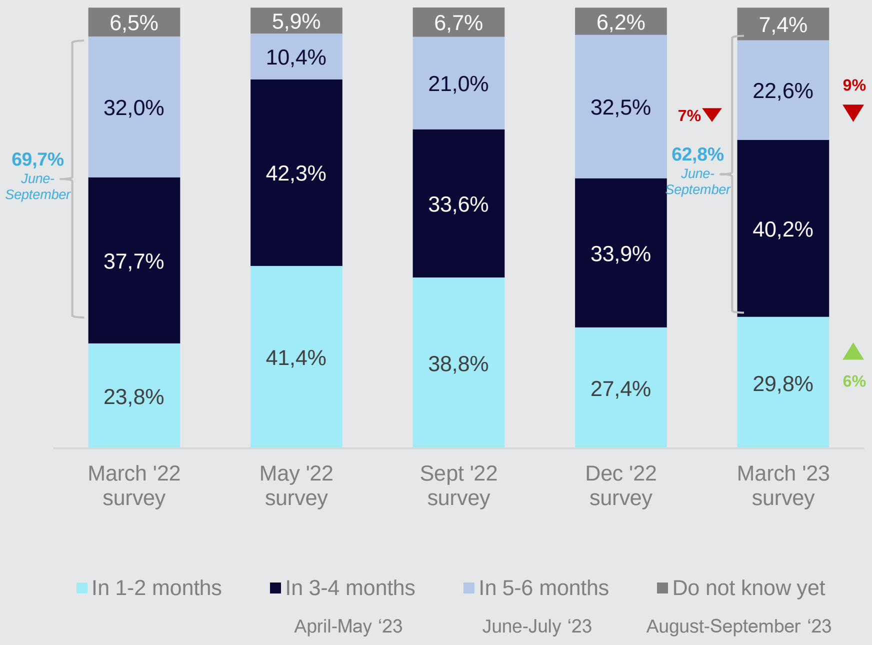
Q8. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?
Q6. What criteria will play the most important role in choosing your next holiday destination?

* Statistically significant difference vs a year ago (March 2022)

No. of respondents: 6,000

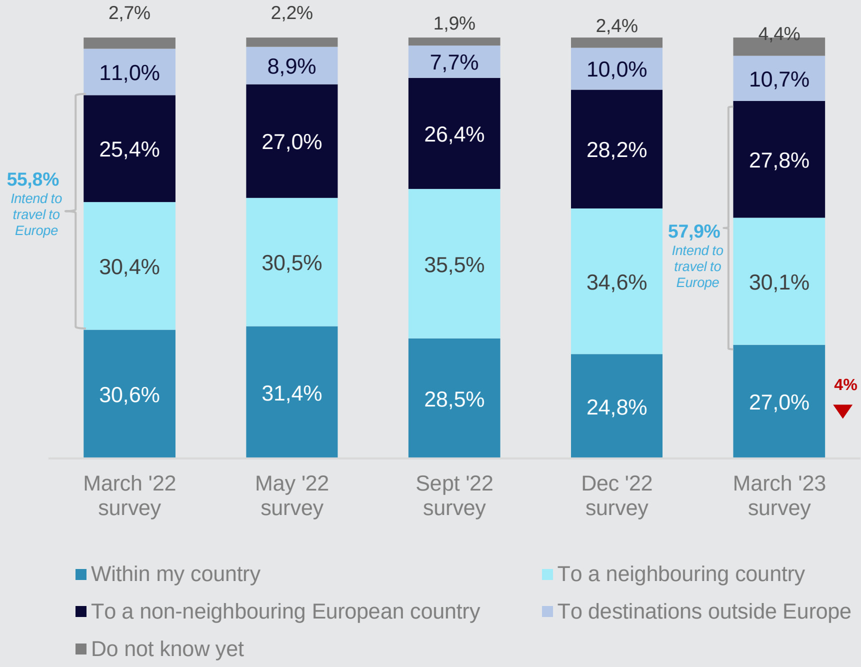
About 63% of Europeans are gearing up to take their next trip in summer 2023.
40% of respondents have plans for June or July, similar to a year ago, and almost 58% plan intra-European trips

When will Europeans travel next?



Q11. 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?



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

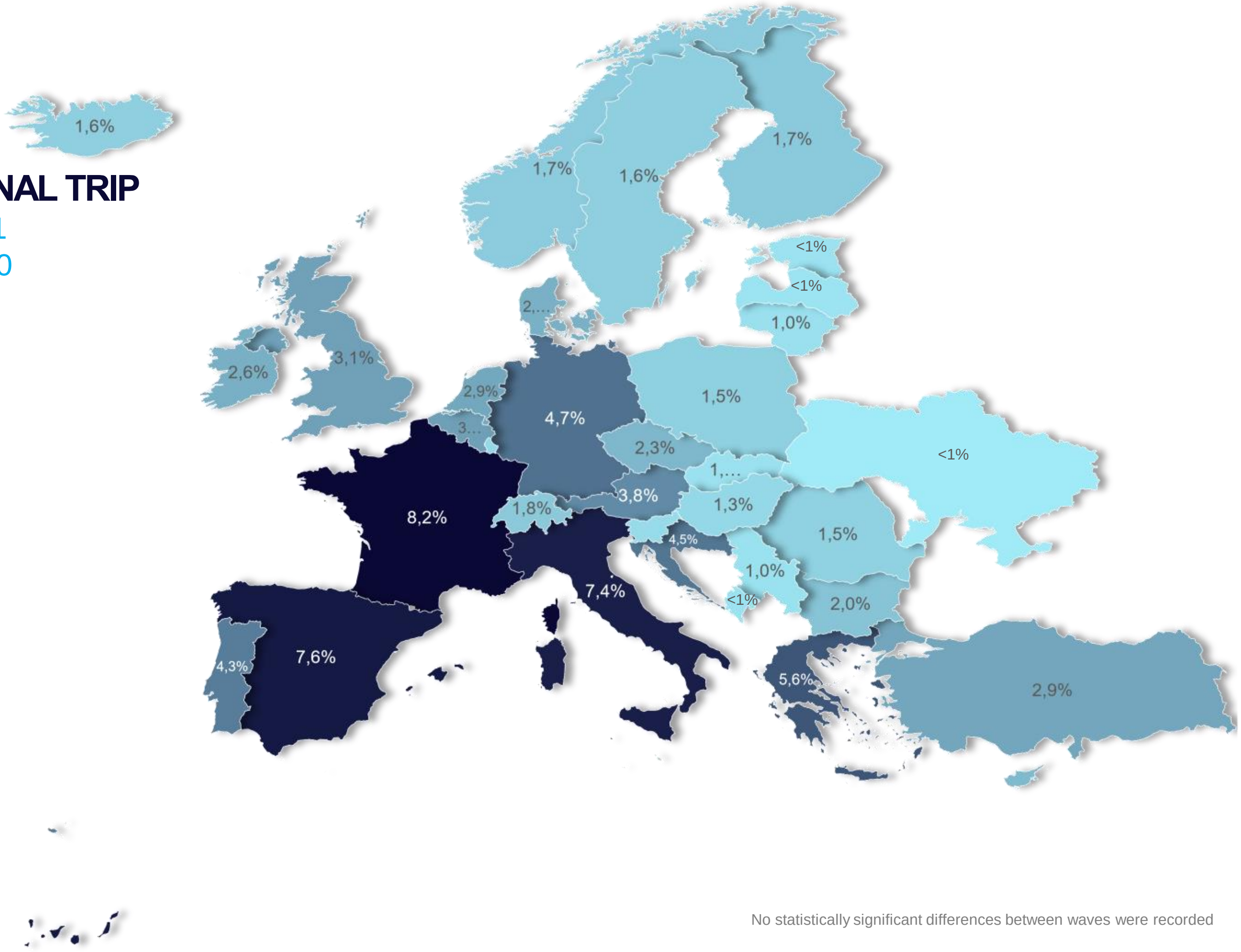
* Statistically significant difference vs a year ago (March 2022)

No. of respondents: 4,337

March ‘23 survey

PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

As the summer arrives, France keeps its no 1 position, the Netherlands falls out of the top 10 and Belgium is a new entrant



TOP 10 COUNTRIES

France	8.2%
Spain	7.6%
Italy	7.4%
Greece	5.6%
Germany	4.7%
Croatia	4.5%
Portugal	4.3%
Austria	3.8%
Belgium	3.1%
United Kingdom	3.1%

*Please use this map as a reference only

No. of respondents: 4,889

Q13. To which country(ies) do you plan to travel next?

No statistically significant differences between waves were recorded

Europeans diversify their travel preferences: leisure decreases (-7%) while business trips increase (+3%)

Top 3 markets to take a leisure trip

Italy
79.4%

UK
76.1%

Spain
71.8%

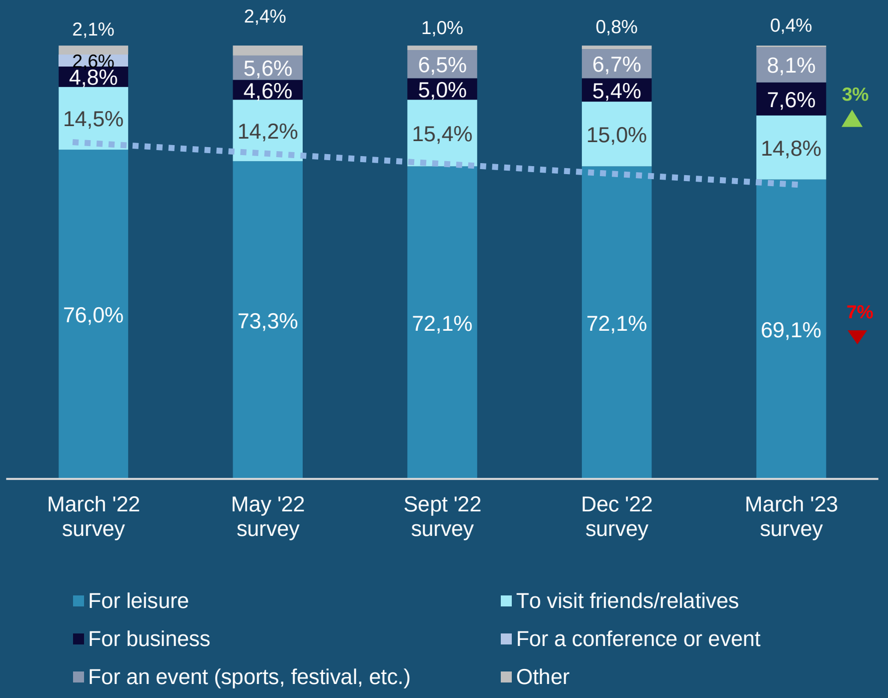
Top 3 markets to take a business trip

Switzerland
19.6%

Austria
13.0%

Netherlands
9.0%

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



* Statistically significant difference vs a year ago (March 2022)

No. of respondents: 4,337

Q10. 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 is still the most preferred leisure trip despite a small year-on-year drop (-4%) Nothing beats the allure of enjoying the beautiful nature, gastronomy, and interesting local traditions while on holiday in Europe

Preferred type of leisure trip in the next 6 months

Preferred type of experiences in the next 6 months

Q17. What type of leisure trip within Europe are you most likely to undertake next?
Q7. Which of the following travel experiences will you look for during your next trip to Europe?

* Statistically significant difference vs a year ago (March 2022)

No. of respondents: 4,337

EUROPEANS’ MOST IN-DEMAND TRIP TYPES AND EXPERIENCES

Travel horizon: April-September 2023

	Sun & Beach	City Break	Culture & Heritage	Nature & Outdoors
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	**25%** >55 **23%** 35-44	**24%** >55 **23%** 25-34	**32%** >55 **23%** 45-54	**31%** >55 **23%** 35-44
MOST COMMON LENGTH OF STAY & BUDGET	**37%** 7-9 nights **29%** 500-1000 € **26%** 4-6 nights **21%** 1001-1500 €	**43%** 4-6 nights **33%** 500-1000 € **31%** Up to 3 nights **23%** Up to 500 €	**42%** 4-6 nights **28%** 500-1000 € **24%** 7-9 nights **21%** 1001-1500 €	**39%** 4-6 nights **32%** 500-1000 € **23%** 7-9 nights **18%** 1001-1500 €
TOP 4 EXPERIENCES TO TRY	**19%** Gastronomic experiences **18%** Enjoy natural landscapes **15%** Dive into local culture **14%** Sightseeing	**20%** Sightseeing **17%** Gastronomic experiences **15%** Dive into local culture **15%** Enjoy natural landscapes	**20%** Learn about history **18%** Sightseeing **17%** Dive into local culture **16%** Gastronomic experiences	**28%** Enjoy natural landscapes **15%** Gastronomic experiences **14%** Dive into local culture **12%** Active holiday experiences

Analysis of preferred type of leisure trip by age, length of stay, budget and types of experiences

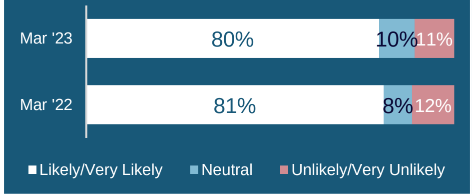
No. of respondents: 4,337

SNAPSHOT: GERMAN TRAVEL PLANS

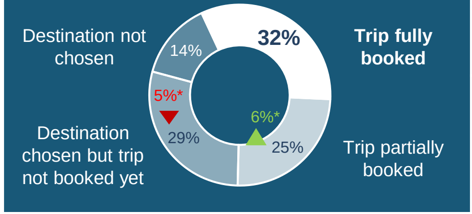
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

▲ 7%*		▼ 27%
31%	37%	22%
April-May '23	June-July '23	August-September '23

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY 31%

NON-NEIGHBOURING COUNTRY 27% 3%* ▲

WITHIN MY COUNTRY 25% 4%* ▲

OUTSIDE EUROPE 12%

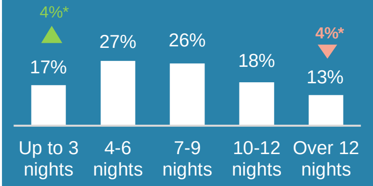
TRAVELLING WITH?

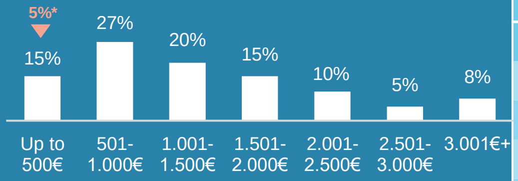
38% with family

31% with partner 4%* ▲

10% 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 **27%**

Nature & Outdoors **16%**

Coast & Sea **16%** 5%* ▼

TOP 5 EUROPEAN DESTINATIONS**

Italy	8%	
Spain	7%	
France	7%	
Austria	7%	
Greece	6%	4%* ▼

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

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

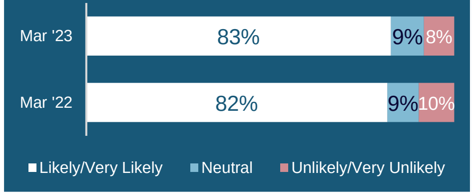
No. of respondents: 750 (total sample of respondents per country)

SNAPSHOT: BRITISH TRAVEL PLANS

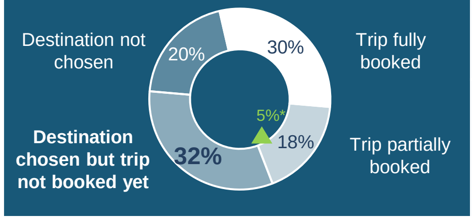
Travel Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

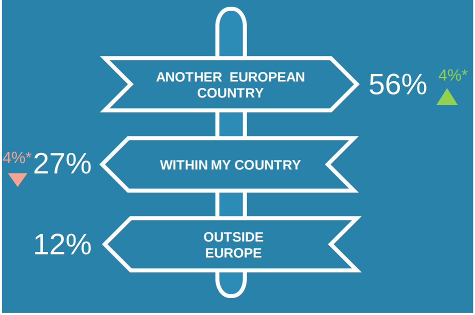
▲ 6%*
29%
April-May '23

▲ 6%*
38%
June-July '23

▼ 10%*
20%
August-September '23

TRAVEL PLANNING

WHERE TO?



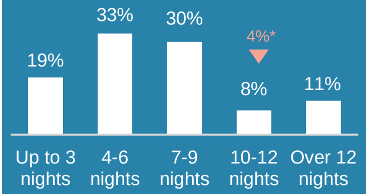
TRAVELLING WITH?

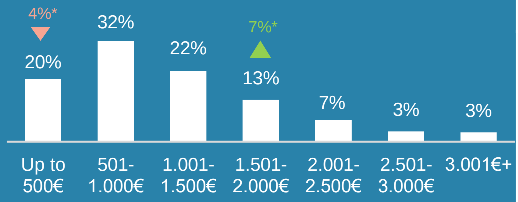
40%
with family

34%
with partner

14% 6%* ▲
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
29% 5%* ▼

City Break
20%

Coast & Sea
11%

TOP 5 EUROPEAN DESTINATIONS**

Spain	14% 8%* ▼
France	12%
Italy	10%
Greece	8%
Germany	5%

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

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

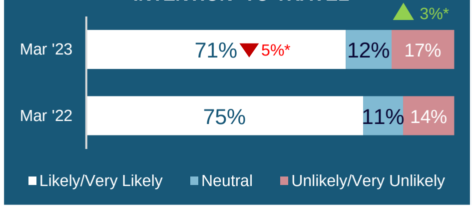
No. of respondents: 750 (total sample of respondents per country)

SNAPSHOT: FRENCH TRAVEL PLANS

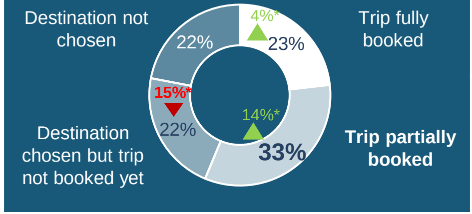
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

▲ 6%* 23%	37%	▼ 8%* 27%
April-May '23	June-July '23	August-September '23

TRAVEL PLANNING

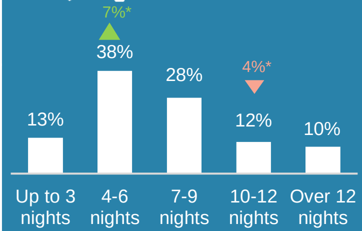
WHERE TO?

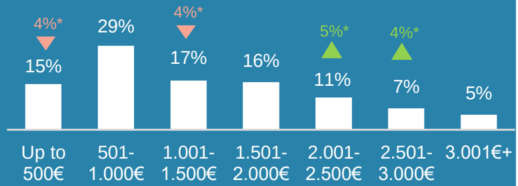
NEIGHBOURING COUNTRY	34%
NON-NEIGHBOURING COUNTRY	17% ▲ 5%*
WITHIN MY COUNTRY	31% ▼ 3%*
OUTSIDE EUROPE	13%

TRAVELLING WITH?

30% ▼ 14%*	37%	12% ▲ 4%*
with family	with partner	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	18%
Nature & Outdoors	17%
Sun & Beach	17% ▼ 6%*

TOP 5 EUROPEAN DESTINATIONS**

Spain	8%	▼ 8%*
Italy	8%	▼ 6%*
Croatia	7%	
Belgium	6%	
Greece	5%	

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

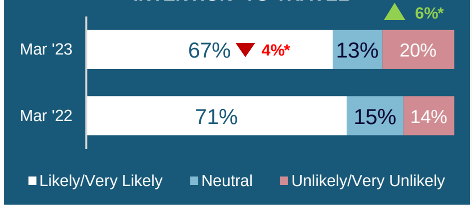
** Based on total sample, without reference to domestic trips

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

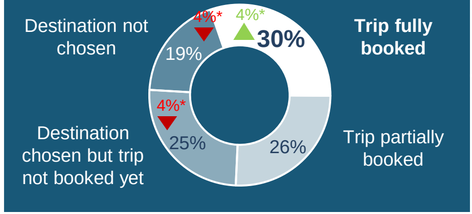
SNAPSHOT: DUTCH TRAVEL PLANS
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

▲ 7%* 27%
April-May '23

▲ 4%* **39%**
June-July '23

▼ 10%* 20%
August-September '23

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY 23% ▲ 7%*

NON-NEIGHBOURING COUNTRY 35% ▼ 5%*

WITHIN MY COUNTRY 22%

OUTSIDE EUROPE 14%

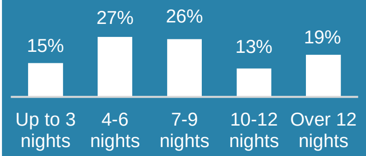
TRAVELLING WITH?

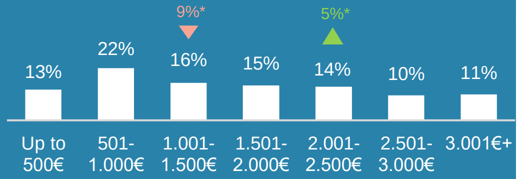
32% with family

30% with partner ▼ 7%*

12% 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
18% ▼ 5%*

Nature & Outdoors
16%

City Break
15%

TOP 5 EUROPEAN DESTINATIONS**

Belgium	8%
Germany	8%
Spain	8%
France	7%
Italy	6%

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

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

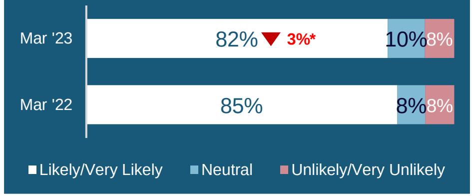
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: ITALIAN TRAVEL PLANS

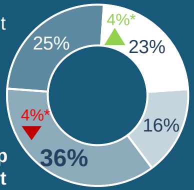
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

7%* ▲ 28%	5%* ▲ 40%	10%* ▼ 24%
April-May '23	June-July '23	August-September '23

TRAVEL PLANNING

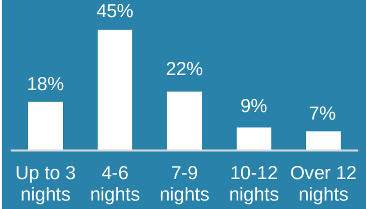
WHERE TO?

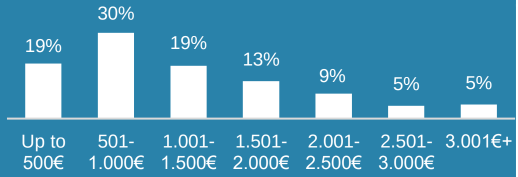
NEIGHBOURING COUNTRY	23%	
NON-NEIGHBOURING COUNTRY	28%	6%* ▲
WITHIN MY COUNTRY	36%	8%* ▼
OUTSIDE EUROPE	8%	

TRAVELLING WITH?

31% with family	40% with partner	10% solo
6%* ▼	5%* ▲	

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	29%
Sun & Beach	14%
Nature & Outdoors	12%

TOP 5 EUROPEAN DESTINATIONS**

France	12%	
Spain	11%	4%* ▼
Greece	7%	
Germany	6%	
Portugal	5%	

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

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

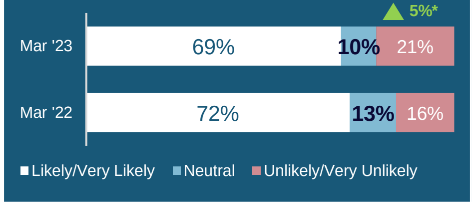
No. of respondents: 750 (total sample of respondents per country)

SNAPSHOT: BELGIAN TRAVEL PLANS

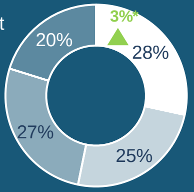
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

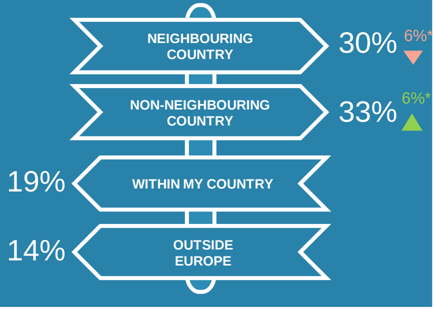


POPULAR TRAVEL PERIODS

26%	36%	▼ 6%* 23%
April- May '23	June- July '23	August- September '23

TRAVEL PLANNING

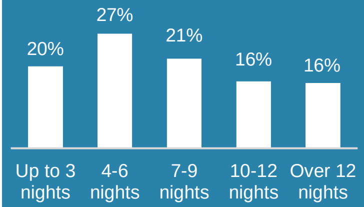
WHERE TO?

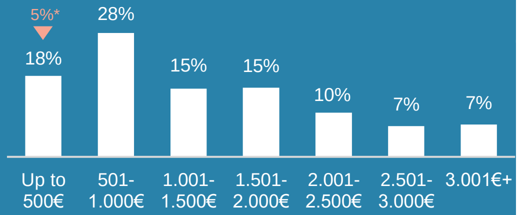


TRAVELLING WITH?

35% with family ▼ 6%*	31% with partner	13% 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

Nature & Outdoors	20%	4%* ▲
Sun & Beach	19%	
Coast & Sea	13%	4%* ▼

TOP 5 EUROPEAN DESTINATIONS**

France	16%
Spain	10%
Italy	8%
Netherlands	6%
Greece	6%

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

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

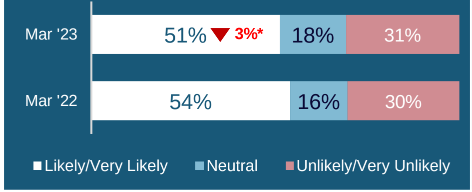
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: SWISS TRAVEL PLANS

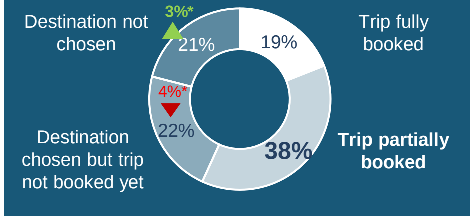
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

27%	28%	26%
April-May '23	June-July '23	August-September '23

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY 24% 6%*

NON-NEIGHBOURING COUNTRY 23%

WITHIN MY COUNTRY 19%

OUTSIDE EUROPE 20% 6%*

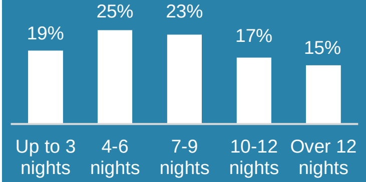
TRAVELLING WITH?

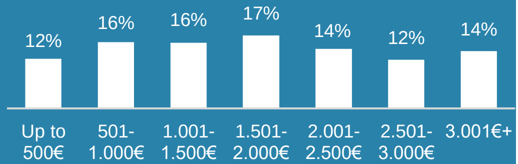
22% with family 5%*

19% with partner

14% 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

Nature & Outdoors 13% 4%*

Coast & Sea 12%

Sun & Beach 10% 6%*

TOP 5 EUROPEAN DESTINATIONS**

Italy	6%
Germany	4%
Spain	4%
Ireland	4%
Czech Republic	4%

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

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

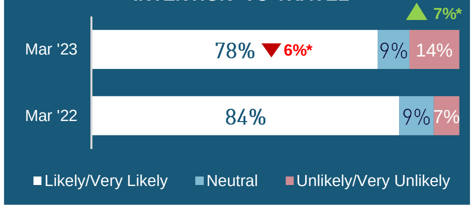
No. of respondents: 485 (total sample of respondents per country)

SNAPSHOT: SPANISH TRAVEL PLANS

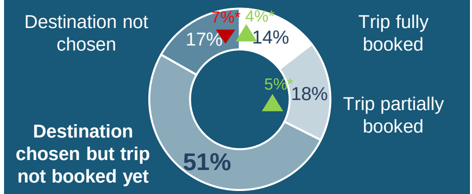
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

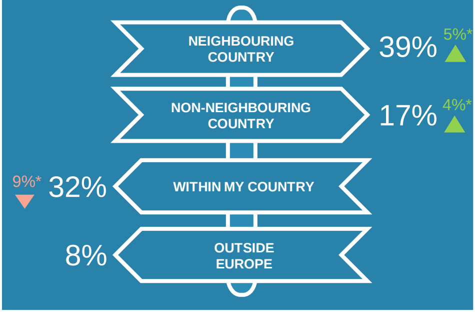


POPULAR TRAVEL PERIODS

▲ 13%*		▼ 12%*
29%	39%	22%
April-May '23	June-July '23	August-September '23

TRAVEL PLANNING

WHERE TO?



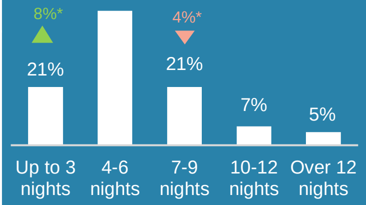
TRAVELLING WITH?

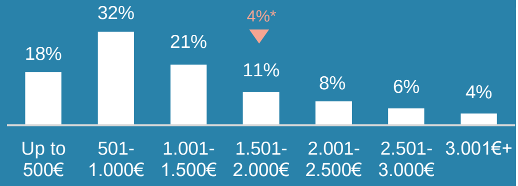
35% with family 5%* ▼

40% with partner

8% 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

City Break **34%**

Culture & Heritage **17%**

Nature & Outdoors **11%**

TOP 5 EUROPEAN DESTINATIONS**

France	18%
Italy	14%
Portugal	10%
Germany	7%
UK	6%

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

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

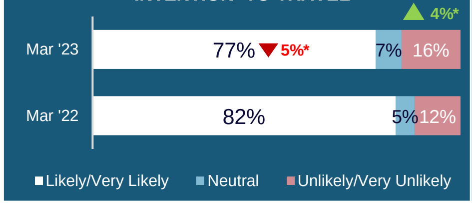
No. of respondents: 501 (total sample of respondents per country)

SNAPSHOT: POLISH TRAVEL PLANS

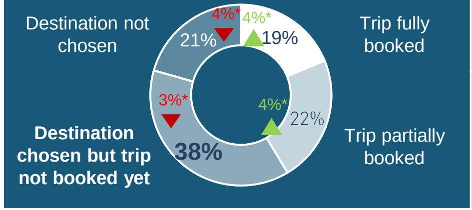
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

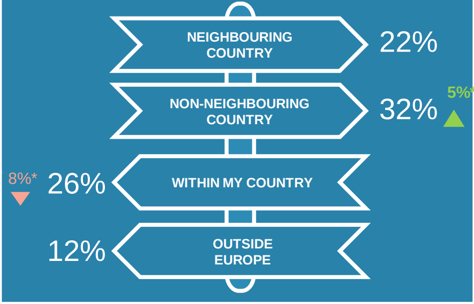
▲ 13%*
25%
April-May '23

42%
June-July '23

▼ 8%*
21%
August-September '23

TRAVEL PLANNING

WHERE TO?



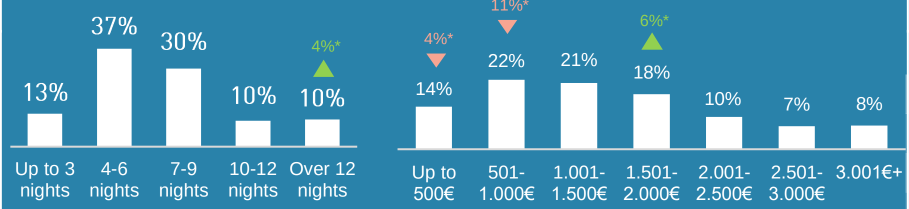
TRAVELLING WITH?

42% with family ▼ 5%*

26% with partner ▼ 8%*

10% 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

City Break
22% ▼ 8%*

Culture & Heritage
15%

Coast & Sea
14%

TOP 5 EUROPEAN DESTINATIONS**

Italy	10%
Croatia	9%
Germany	6%
Greece	6%
France	6%

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

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

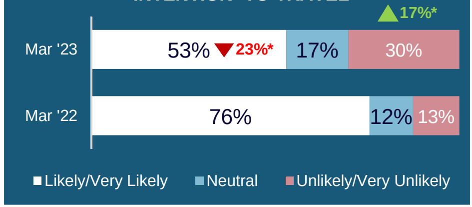
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: AUSTRIAN TRAVEL PLANS

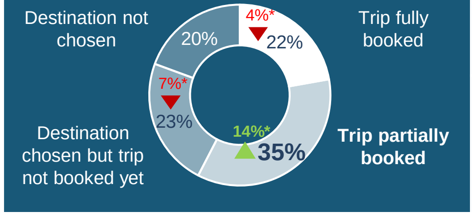
Travel horizon: April-September 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

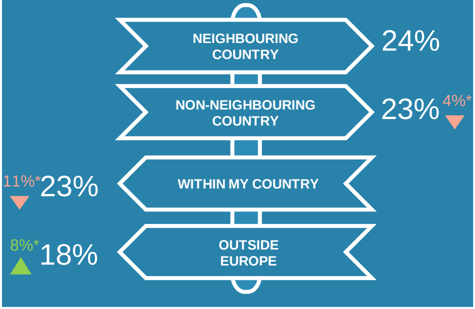


POPULAR TRAVEL PERIODS

▲3%*	▼3%*	
31%	29%	26%
April-May '23	June-July '23	August-September '23

TRAVEL PLANNING

WHERE TO?



NEIGHBOURING COUNTRY 24%

NON-NEIGHBOURING COUNTRY 23% ▼4%*

WITHIN MY COUNTRY 23% ▼11%*

OUTSIDE EUROPE 18% ▲8%*

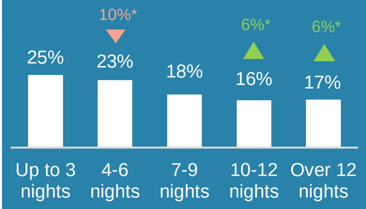
TRAVELLING WITH?

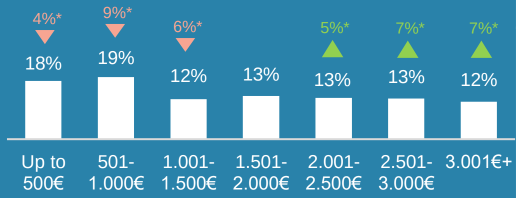
23% with family ▼9%*

20% with partner ▼12%*

14% solo ▲4%*

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

City Break **14%** ▼20%*

Food & Wine **11%**

Coast & Sea **10%**

TOP 5 EUROPEAN DESTINATIONS**

Italy	6%	▼9%*
Croatia	5%	▼6%*
Germany	5%	
Turkyie	4%	
Greece	3%	

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

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

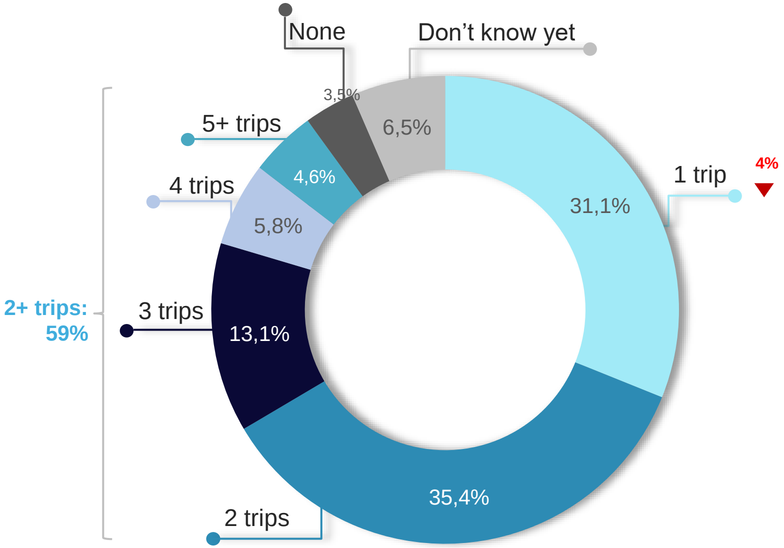
No. of respondents: 501 (total sample of respondents per country)

TRIP PLANNING

02

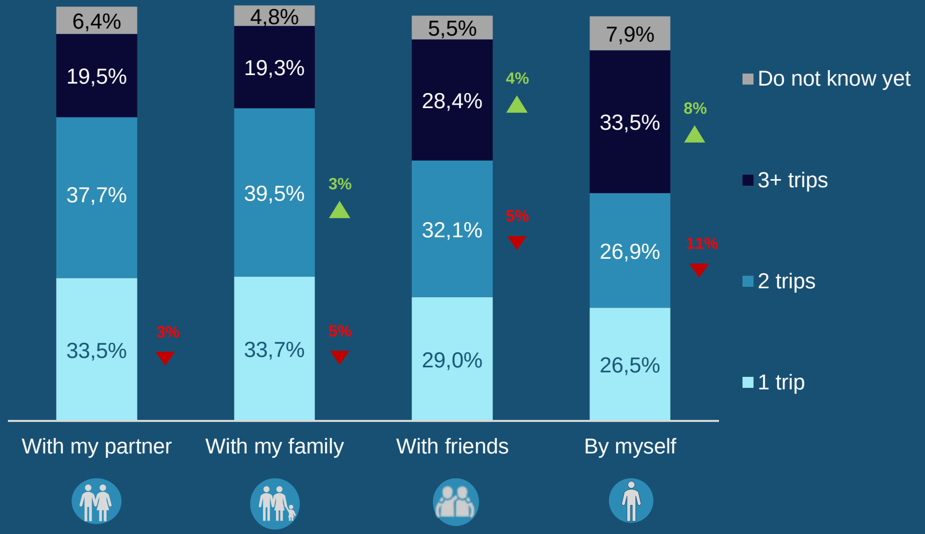
Multiple trips are popular: 59% of Europeans plan two or more trips by the end of September 2023. Solo travellers lead the way, with 34% planning to take at least three trips.

Number of intended trips within Europe in the next 6 months



March '23 survey

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



Q9. How many trips do you plan to take in the next 6 months, within Europe?

Statistically significant difference vs the previous wave (December '22)

No. of respondents: 4,337

Compared to a year ago, Europeans are more likely to opt for bus and train services during their next trip, while the reliance on personal cars is slightly declining

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

Spain

70.6%

3%* ▲

UK

70.0%

Italy

63.4%

8%* ▲

Poland

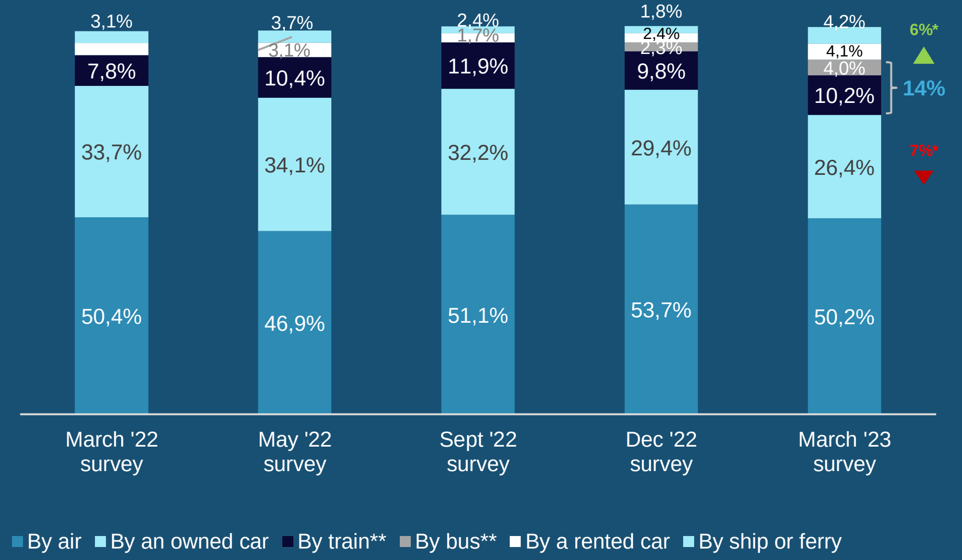
54.5%

France

51.3%

4%* ▲

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



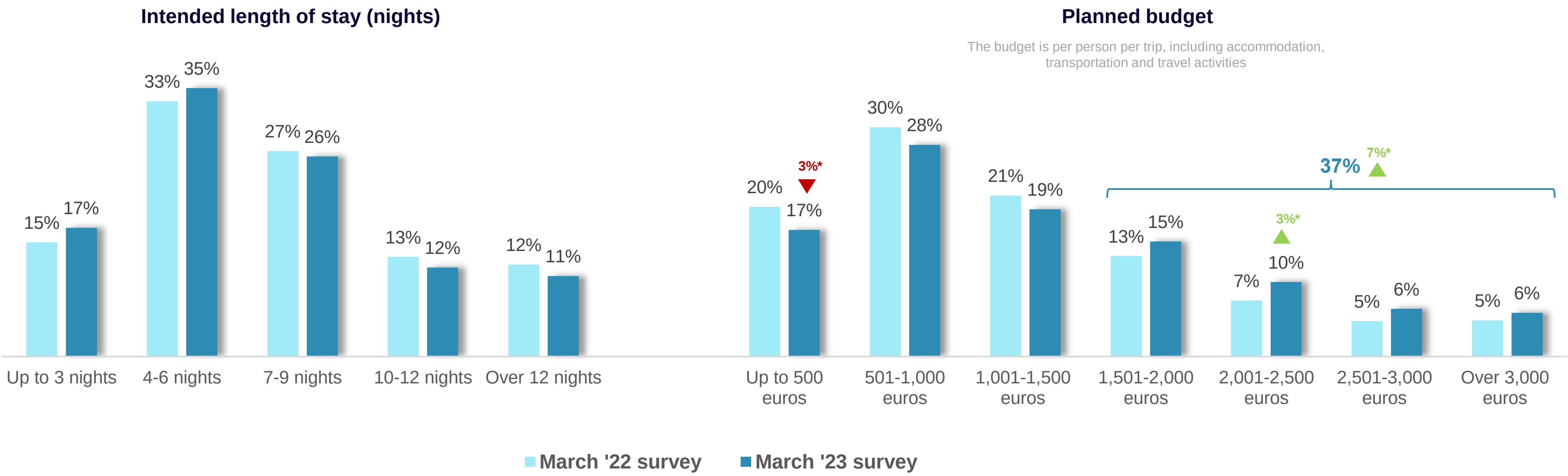
*Statistically significant difference vs a year ago (March 2022)

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

No. of respondents: 4,337

Q14. Which of the following modes of transport would you most consider using during your next trip within Europe?

Travel budgets are going up: the share of Europeans planning to spend over 1,500 euros for their next trip Increases by 7% compared to a year ago. More than a third of travellers (35%) plan trips of 4-6 nights.



AFFLUENT TRAVELLERS ARE FREQUENT TRAVELLERS

Europeans planning more trips tend to have a higher budget per person per trip: 20% of travellers planning 3 trips, and 30% of those planning 4 trips will have a budget of 2,000-3,000 euros, while only 13% of travellers who plan a single trip will spend the same per trip.

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)?

No. of respondents: 4,337

LONGER TRIPS COME WITH HIGHER BUDGETS

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	40%	16%	9%
501 - 1,000 euros	32%	34%	24%
1,001 - 1,500 euros	10%	23%	22%
1,501 - 2,000 euros	6%	14%	19%
2,001 - 2,500 euros	5%	7%	13%

Key characteristics of trips over 7 nights

Age: 30% of these trips are taken by travellers over the age of 54

Trip type: 22% of these trips are Sun & Beach holidays

Companions: 33% are family trips and 29% with a partner

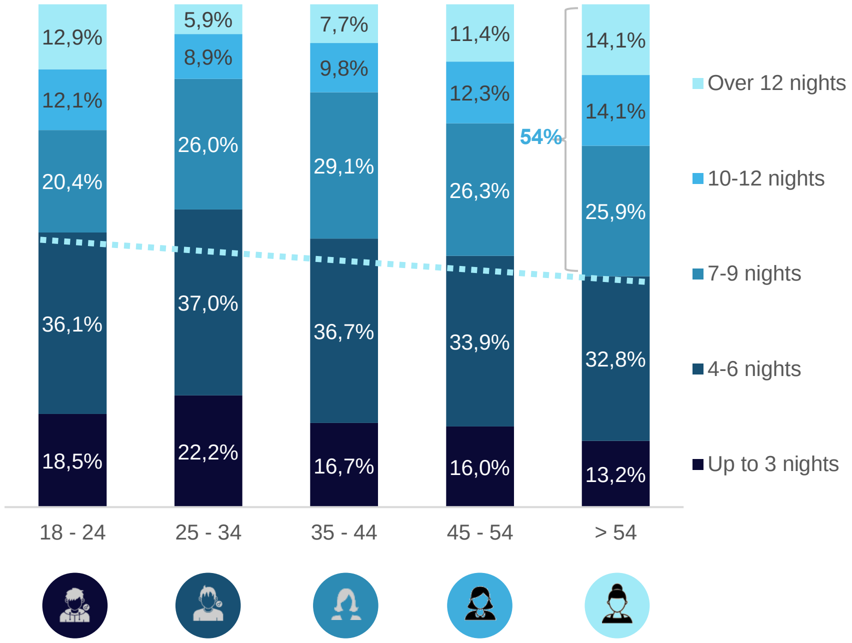
No. of respondents: 4,337

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)?

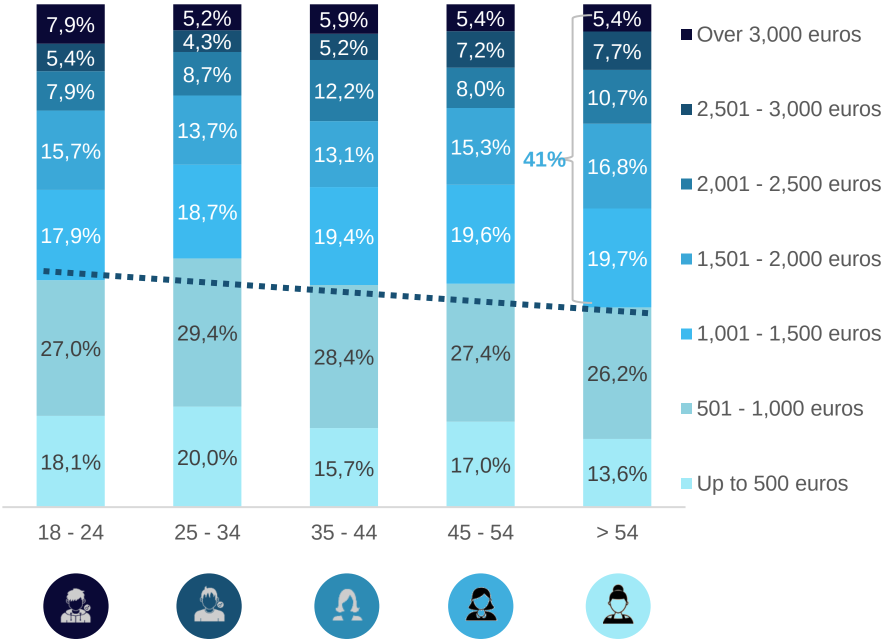
Over half of mature travellers (54+) are planning trips of at least 7 nights and have the highest budget among all age groups

Intended length of stay (nights)



Envisaged budget

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



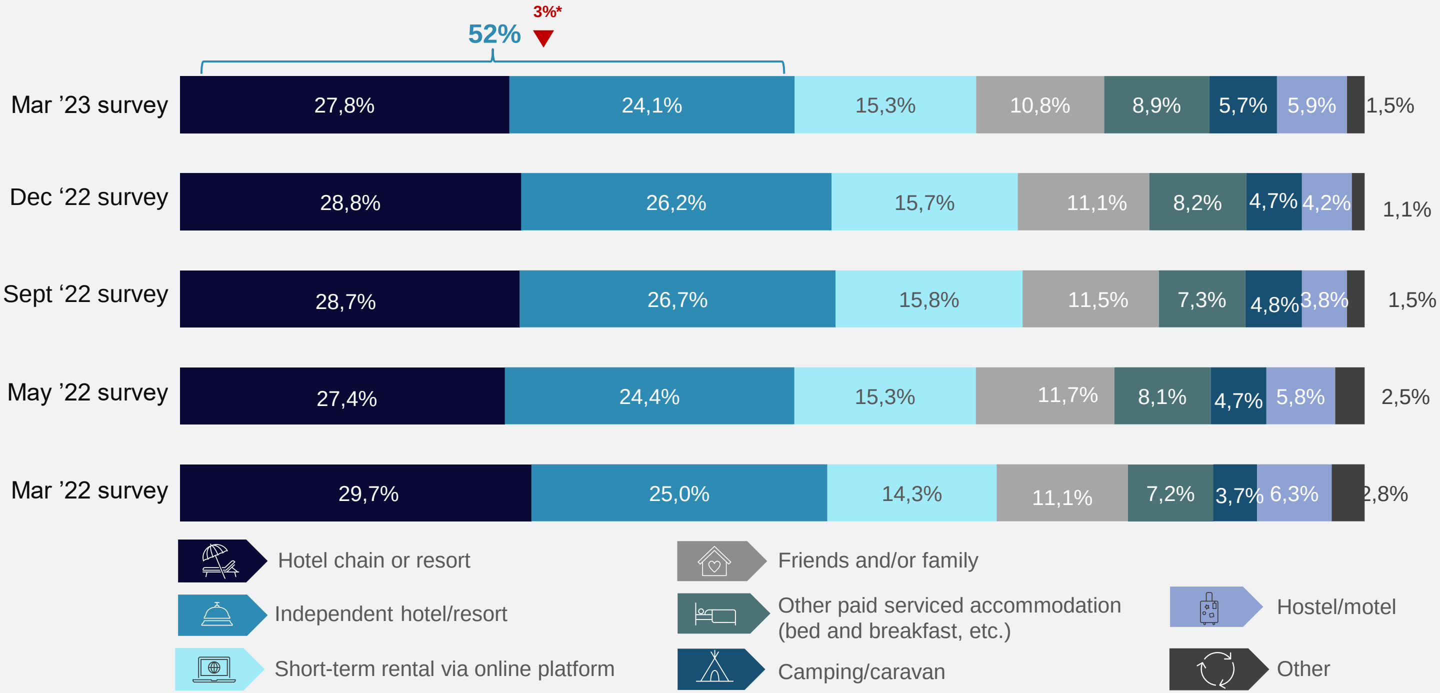
Q18. What would be the length of your next overnight trip?

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

No. of respondents: 4,337

Despite the rise of alternative types of accommodation, hotels continue to be the preferred option for 52% of Europeans, while short-term rentals are the next best contender

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



51% of travellers staying in short-term rentals plan to spend up to 1,000 euros per person per trip, compared to 38% of hotel chain guests

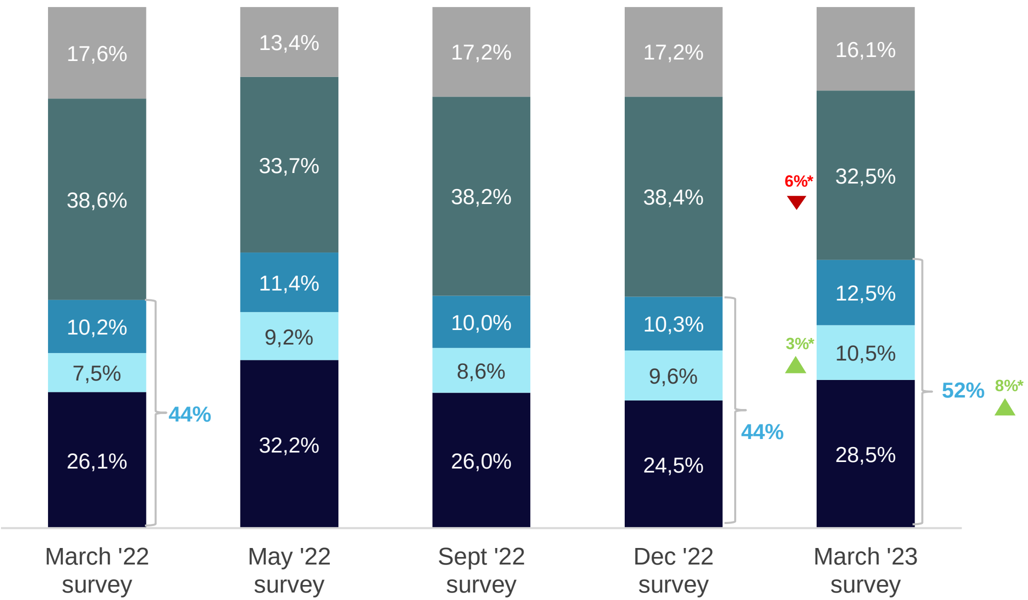
Q15. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

*Statistically significant difference vs a year ago (March 2022)

No. of respondents: 4,337

Better prepared than a year ago: Over half of Europeans have already fully or partially secured their upcoming holidays, with a significant 8% surge in bookings compared to 2022

Planning status for the next trip



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

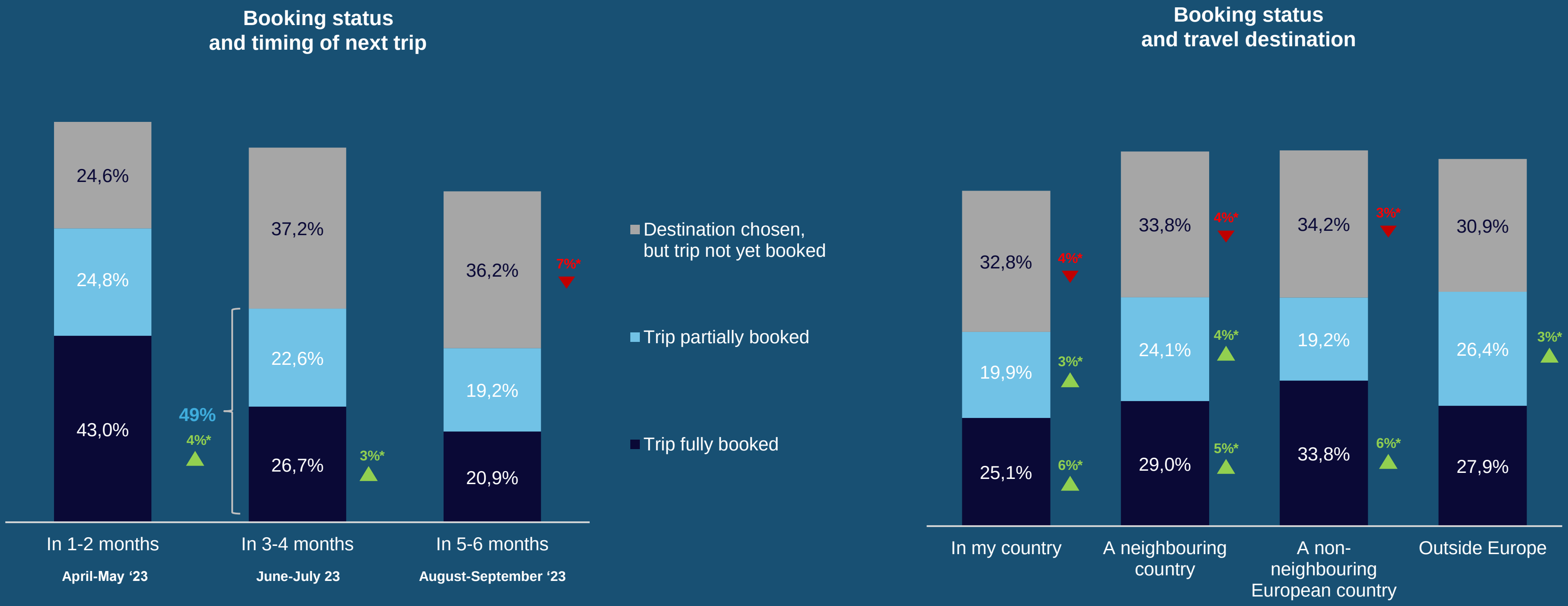
Younger travellers are more likely to book in advance
56% of Gen Z travellers (aged 18-24) have fully or partially booked their next trip compared to 50% of travellers aged 25-54, and 45% of those aged over 54

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

* Statistically significant difference vs a year ago (March 2022)

No. of respondents: 4,337

49% of Europeans have already fully or partially booked their trip for June-July; the percentage of fully-booked trips is higher among travellers heading to non-neighbouring European countries



March '23 survey

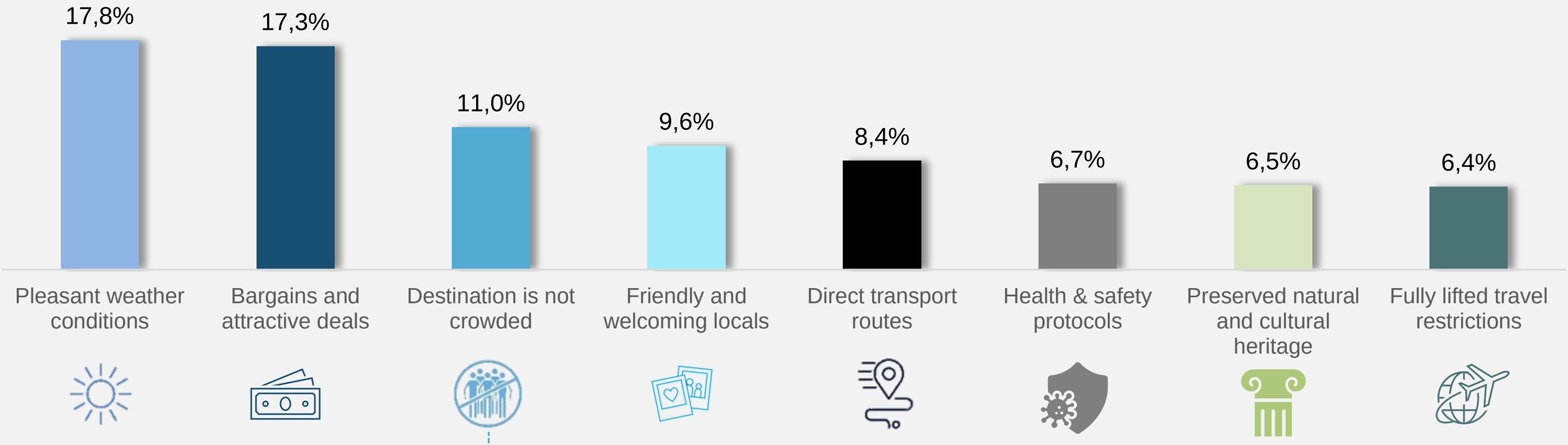
Q21. Please select a response which best describes the planning for your next trip:

*** Statistically significant difference vs a year ago (March 2022)**

No. of respondents: 4,337

While good weather and tempting bargains remain the top priorities for Europeans when selecting their holiday destination, a new contender has emerged - tranquillity and uncrowdedness of destinations

Top 8 criteria for choosing the next travel destination



An uncrowded destination is important for 28% of travellers who are planning Nature & Outdoors trips, and 24% of travellers planning a City Break

Q5. What criteria will play the most important role in choosing your next holiday destination?

* The question was introduced in May'22.

No. of respondents: 6,000

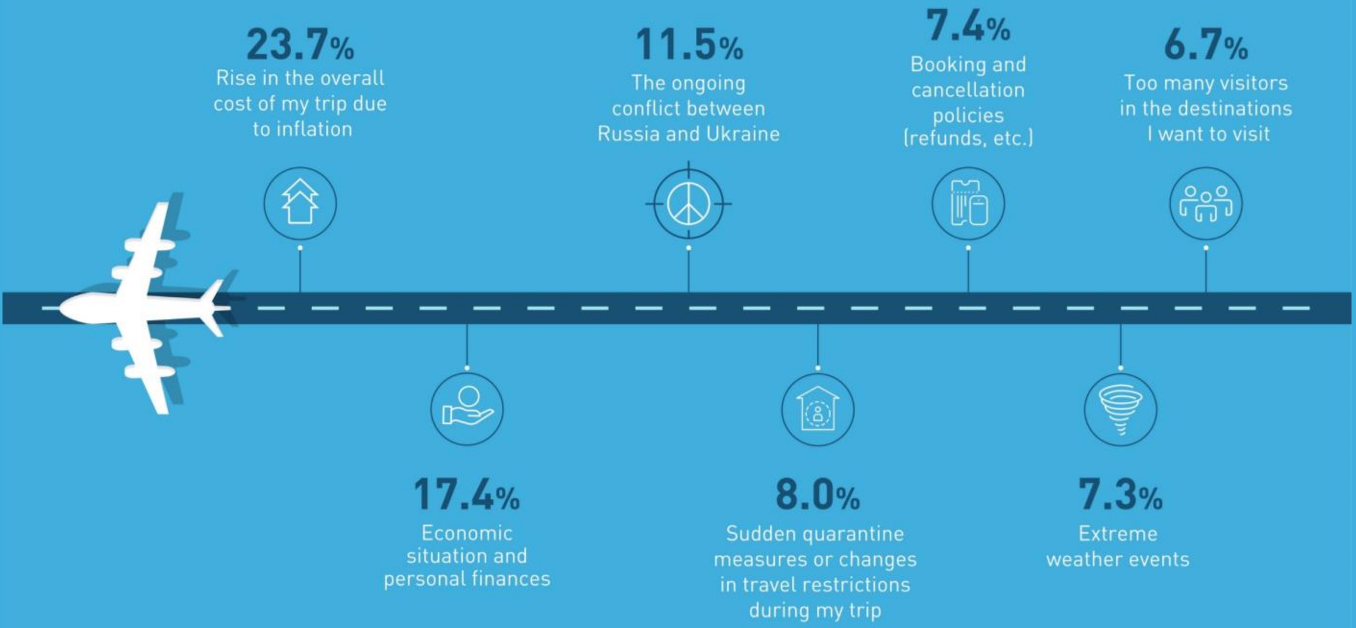
TRAVEL CONCERNS

03

WHAT DO EUROPEAN TRAVELLERS WORRY ABOUT?

Europeans remain anxious about the financial burden of their voyages (24%) and their personal finances (17%) Adding to their worries is the growing unease over extreme weather conditions (7%), which is climbing up the list of top concerns

The biggest concerns about travelling within Europe (March ’ 23 survey)



Top 4 markets concerned with rising travel costs	Top 4 markets concerned with personal finances
Spain 28%	Spain 20%
UK 25%	Poland 19%
Germany 25%	Germany 19%
Italy 25%	UK 19%

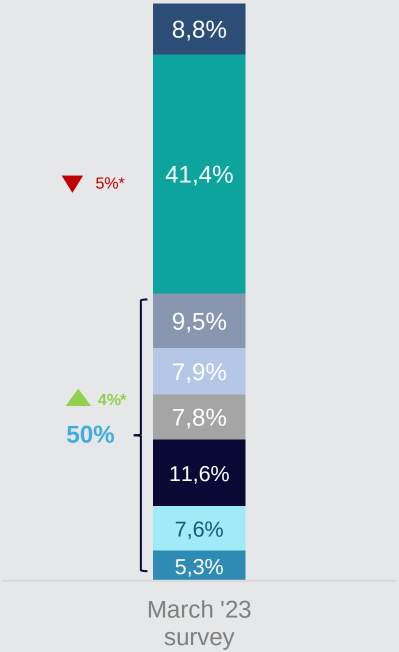
Q4. What currently concerns you the most about travelling within Europe?

* Statistically significant difference vs the previous wave (December 2022)

No. of respondents: 4,337

The ongoing war in Ukraine continues to impact travel-related decisions for half of Europeans (+4% compared to December 2022)

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 changing their travel plans

Most often mentioned change:

‘I changed my itinerary to avoid countries neighbouring the conflict zone’

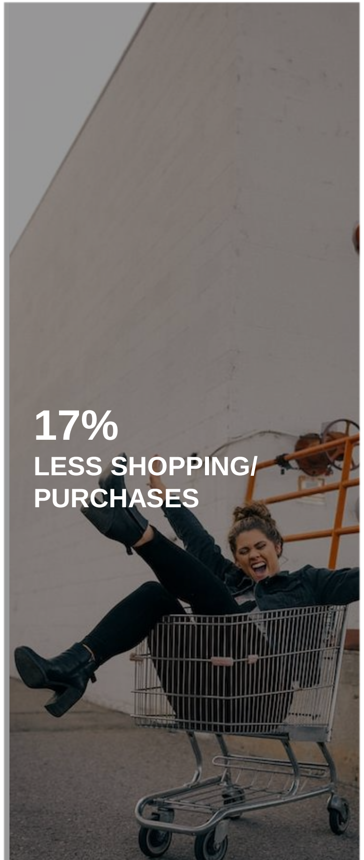
▲ 10%*	**Switzerland** 45.1%	**12%**
▲ 7%*	**Poland** 42.8%	**15%**
▲ 17%*	**Austria** 41.4%	**12%**
	Italy 39.1%	**15%**
▲ 10%*	**Netherlands** 37.9%	**10%**

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

* Statistically significant difference vs the previous wave 14 (December 2022)

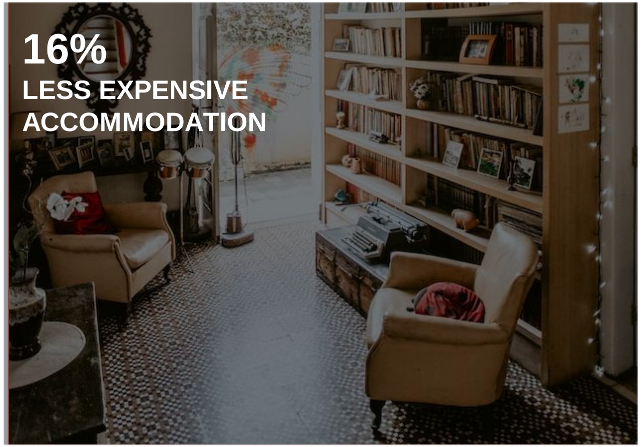
* The question was introduced in May 2022 No. of respondents: 6,000

HOW WILL EUROPEANS ADAPT THEIR TRAVEL BEHAVIOUR IN LIGHT OF THE ECONOMIC CHALLENGES?



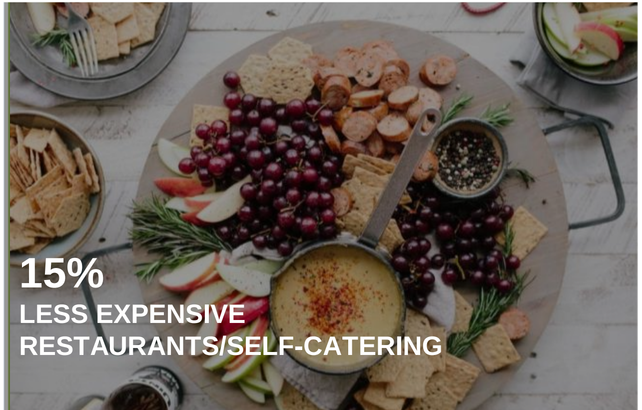
17%

LESS SHOPPING/ PURCHASES



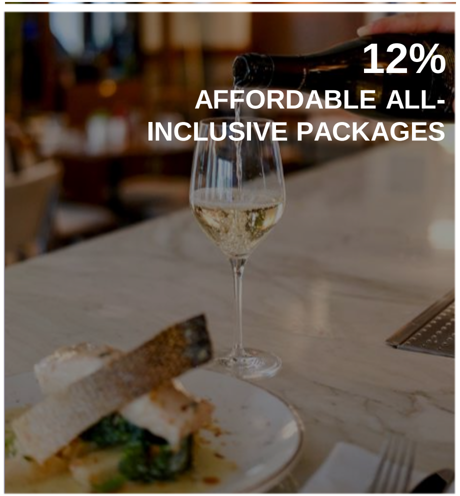
16%

LESS EXPENSIVE ACCOMMODATION



15%

LESS EXPENSIVE RESTAURANTS/SELF-CATERING

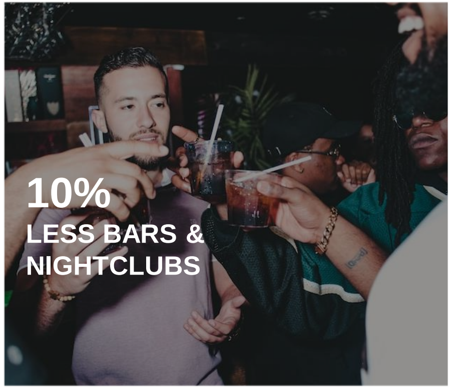


12%

AFFORDABLE ALL-INCLUSIVE PACKAGES

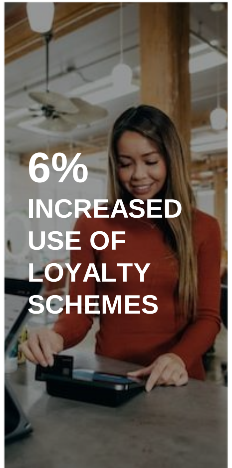
10%

LESS ACTIVITIES WITH ADMISSION FEES



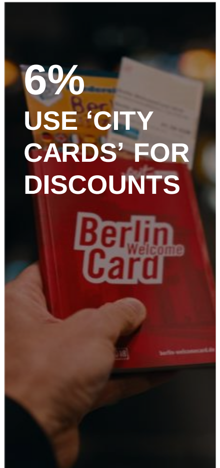
10%

LESS BARS & NIGHTCLUBS



6%

INCREASED USE OF LOYALTY SCHEMES



6%

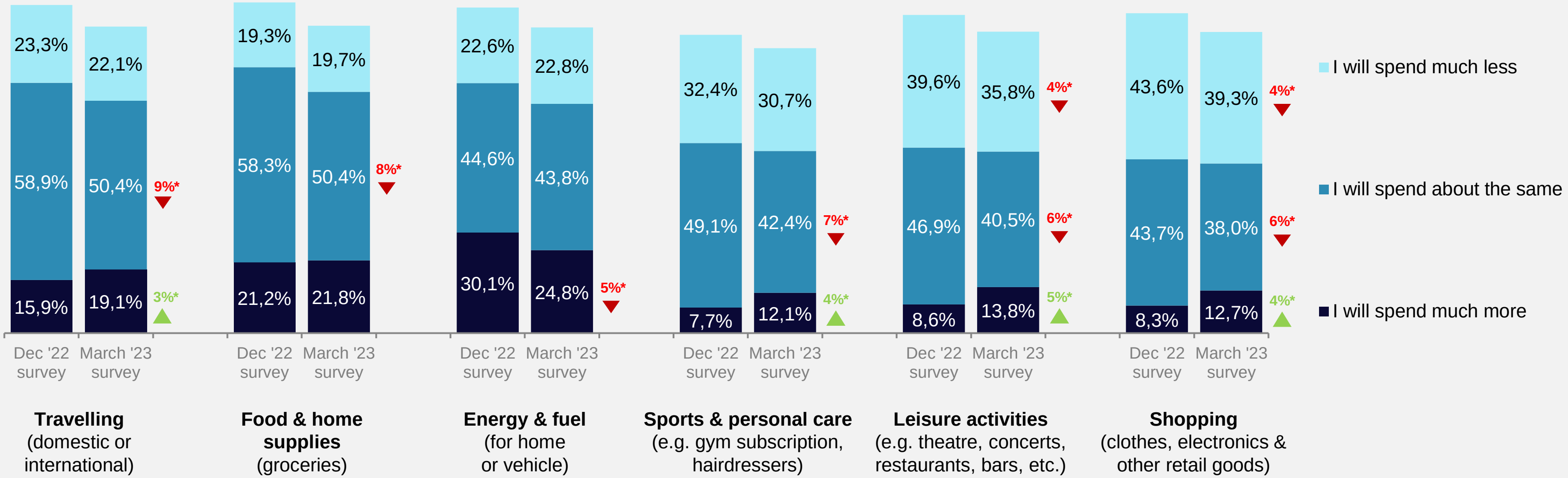
USE ‘CITY CARDS’ FOR DISCOUNTS

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: 4,337

Travel expenditure stays quite resilient compared to other spending categories: half of Europeans will spend the same as usual, and 19% will spend even more

Anticipated changes in spending, in the coming six months



24% of business travellers plan to spend much more on travel in the next six months compared to 17% of leisure travellers

Q22. Thinking about the next six months, do you foresee any changes in your budget for each of the following categories?

No. of respondents: 6,000

METHODOLOGICAL ANNEX

04

METHODOLOGICAL DETAILS

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 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 / **Wave 15**: 1-7 March 2023; 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)
- 45% of the Wave 13 survey respondents are male and 55% 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	104	96	92	56	90	84	88	812
	25 - 34	136	112	73	88	128	152	106	116	88	112	1,111
	35 - 44	126	134	103	115	140	150	120	112	113	116	1,229
	45 - 54	138	168	105	102	146	168	92	91	126	96	1,232
	≥55	262	266	175	91	240	188	126	91	89	88	1,616
Total		**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**500**	**500**	**6,000**

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 eliminate every margin of error.

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