MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

TRAVEL HORIZON: JUNE - NOVEMBER 2023
Europeans want to travel, but less than a year ago

This report monitors sentiment and short-term plans for domestic and intra-European travel and is the 16th wave of a market research project\(^1\) which began in September 2020. Results are based on data collected in May 2023 from Europeans in 10 high-volume source markets.

- 69% of Europeans plan to travel between June and November 2023, a slight decrease of 4% compared to last year. Europeans aged 25-44 are the most eager to travel (71%), while Gen Z – aged 18-24 – are the most hesitant (63%).

- Among Europeans with travel plans, the majority (77%) intend to take a trip between June-September. Visiting a non-neighbouring European country emerges as the top preference, capturing 29% of interest, the highest level since August 2020.

- Non-leisure travel grows in popularity: interest in business travel and event trips both increased by 4% over 2022.

- Europeans’ most desired types of leisure trips for this summer and autumn are Sun & Beach holidays (18%), Culture & Heritage getaways (16%) and City Beaks (14%).

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\(^1\)The data collection and research methodology are detailed in the methodological annex (slide 43)
WAVE 16 RESEARCH HIGHLIGHTS

The share of travellers intending to use public transport reaches an all time high

- 60% of European travellers plan to take at least two trips this summer and autumn, while a considerable 12% intend to head for four or more trips (an increase of 5% compared to a year ago).

- Similar to 2022, the intended lengths of stay at the destination remain 4-6 nights (36%), and 7-9 nights (27%), while the intended budget has increased by 8% compared to a year ago: 41% of travellers plan to spend more than 1,500 euros.

- The share of Europeans who intend to travel by train or bus has reached an all-time high of 16%. Yet, taking a flight remains the most popular option for 48% of respondents, while driving a personal car appeals to 25% of people with travel plans (down by 10% compared to a year ago).

- For the first time, preference for hotel accommodation drops below the 50% threshold (currently 49%), while interest in short-term rentals peaks to 17%.

- 56% of Europeans have already fully or partially booked their upcoming trip - a 4% rise compared to the same period last year.

- Pleasant weather (17%), attractive deals (17%) and welcoming locals (12%) remain Europeans’ top criteria for choosing a travel destination.
• High travel prices and personal finances are consolidated as the primary travel concerns for Europeans, with respective increases of 6% and 4% compared to the same period in 2022.

• Responding to the ongoing financial challenges, 17% of Europeans will consider off-season travel, 14% will opt for destinations they perceive as more affordable, and 14% will book activities well in advance.

• During their next trip, 17% of Europeans plan to cut down on shopping, 15% will opt for less-expensive accommodation establishments, while 15% will select less-expensive restaurants or settle for self-catering.

• While concerns regarding the war between Russia and Ukraine slightly drop (decreasing by 3%), its impact on Europeans’ travel-related decisions has increased by 9%, affecting 44% of travellers.
To leverage the growing interest in travelling for events, which is particularly appealing among 18–24-year-old Europeans, destinations could *organise small-to-medium pop-up events and festivals aimed at young people*. This could further enhance their interest to travel after the summer season.

Now is also a good time for destinations to proactively *design and organize larger-scale events for late autumn plus sponsor already-planned events for the same period*, to boost awareness in such events.

As the interest in short-term rentals continues to increase, destinations should put efforts to *responsibly manage this growing trend and its social and economic implications* for the host communities. Potential measures may include requiring licensing, applying tourism tax, or limiting the number of days a property could be rented.

European tourism returns to full capacity, and so do Europeans’ concerns about over-crowded destinations. This is a prime *opportunity for lesser-known destinations to promote themselves*, through, for instance, *cooperation with highly-popular destinations* that want to better manage their tourism flows.

Travellers’ interest in using public transportation peaks for City Breaks (27%), Culture & Heritage trips (26%) and Sun & Beach holidays (25%). Destinations offering such kind of trips are recommended to *highlight their accessibility by rail and bus*. Besides, they can *create holiday packages that include a transportation ticket*. 
WAVE 16
RECOMMENDATIONS FOR BUSINESSES

- The increasing travel costs and the economic situation are prime concerns in the coming summer and autumn. Special bargains, early-booking deals and price promotion offerings (such as ‘travel now and pay later’) are now an essential element in winning the hearts - and pockets - of European travellers.

- As the share of Europeans who prefer to book their next trip in advance (in full or at least one out of transportation or accommodation) surges by 4% compared to a year ago, businesses can promote early-bird packages for October-November, offering a ‘life jacket’ against cost increases.

- Europeans’ top experiences include tasting the local cuisine (16%), diving into the local life (15%) and learning about history and culture (13%). Tour companies are therefore encouraged to promote going beyond the ordinary and offer unique, immersive experiences. Some examples could be joining meal preparation hosted by a local family, art workshops with local craftsmen, or family-oriented agritourism activities in a local farm.

- In response to the slight decrease in the preference for hotel stays, hotels should focus on targeting segments which are most likely to opt for this type of stay; these include Europeans travelling with their partner (52%) or family (49%) and who are taking a Sun & Beach holiday (56%) or a City Break (54%).
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Wave 16

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

<table>
<thead>
<tr>
<th>Survey dates</th>
<th>Wave 12</th>
<th>Wave 13</th>
<th>Wave 14</th>
<th>Wave 15</th>
<th>Wave 16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>9-12 May ‘22</td>
<td>13-23 Sept ‘22</td>
<td>15-29 Dec ‘22</td>
<td>1-7 March ‘23</td>
<td>8 May-4 June ‘23*</td>
</tr>
</tbody>
</table>

2. To present Wave 16 timings in which respondents are ‘most likely to take their next trip’, the following time periods should be used as a reference:
   - In 1-2 months: June - July 2023
   - In 3-4 months: August - September 2023
   - In 5-6 months: October - November 2023

3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents: 6,002
   - Respondents most likely to travel in the next 6 months: 4,165
   - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,967

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.

*Fieldwork in France, Belgium, the Netherlands and Switzerland stopped on May 19th and was relaunched on May 31st
69% of Europeans plan to travel between June and November 2023, a slight decrease of 4% compared to 2022.

Top 5 markets most likely to travel in the next six months:

- **France**: 80.0% (7%*)
- **Belgium**: 79.1% (6%*)
- **Netherlands**: 73.4% (4%*)
- **UK**: 74.9% (7%*)
- **Poland**: 74.2% (13%*)

*Statistically significant difference vs a year ago (May 2022)
Europeans over the age of 25 share a high sentiment for travelling, despite a drop in intentions among travellers over the age of 45.

**Intention to travel in the next six months by age group**

- **Very unlikely/unlikely**
  - 18-24: 22.9%
  - 25-34: 18.0%
  - 35-44: 10.4%
  - 45-54: 10.0%
  - >55: 9.9%

- **Neutral**
  - 18-24: 62.6%
  - 25-34: 71.3%
  - 35-44: 71.2%
  - 45-54: 70.5%
  - >55: 69.2%

- **Likely/very likely**
  - 18-24: 14.5%
  - 25-34: 4%
  - 35-44: 18.4%
  - 45-54: 19.5%
  - >55: 21.0%

**TOP TRAVEL EXPERIENCES BY AGE GROUP:**

- **Enjoy natural landscapes**
  - 18-24: 15%
  - 25-34: 17%
  - 35-44: 16%
  - 45-54: 17%
  - >55: 17%

- **Gastronomic experiences**
  - 18-24: 13%
  - 25-34: 14%
  - 35-44: 16%
  - 45-54: 16%
  - >55: 16%

- **Sightseeing**
  - 18-24: 15%
  - 25-34: 15%
  - 35-44: 13%
  - 45-54: 14%
  - >55: 15%

- **Dive into local culture**
  - 18-24: 6%
  - 25-34: 8%
  - 35-44: 7%
  - 45-54: 8%
  - >55: 7%

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

11 Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

12 Q6. What criteria will play the most important role in choosing your next holiday destination?
### Q10. When are you most likely to go on your next trip either in your country or within Europe?

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Within my country</th>
<th>To a neighbouring country</th>
<th>To a non-neighbouring European country</th>
<th>To destinations outside Europe</th>
<th>Do not know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '22 survey</td>
<td>41,4%</td>
<td>10,4%</td>
<td>21,0%</td>
<td>27,4%</td>
<td>5,9%</td>
</tr>
<tr>
<td>Sept '22 survey</td>
<td>33,6%</td>
<td>14,0%</td>
<td>27,4%</td>
<td>29,8%</td>
<td>6,7%</td>
</tr>
<tr>
<td>Dec '22 survey</td>
<td>27,4%</td>
<td>18,7%</td>
<td>32,5%</td>
<td>30,2%</td>
<td>6,2%</td>
</tr>
<tr>
<td>March '23 survey</td>
<td>29,8%</td>
<td>15,1%</td>
<td>40,2%</td>
<td>39,2%</td>
<td>7,4%</td>
</tr>
<tr>
<td>May '23 survey</td>
<td>38,1%</td>
<td>15,1%</td>
<td>40,2%</td>
<td>39,2%</td>
<td>7,7%</td>
</tr>
</tbody>
</table>

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

### Q11. Where do you plan to travel in the next 6 months?

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Within my country</th>
<th>To a neighbouring country</th>
<th>To a non-neighbouring European country</th>
<th>To destinations outside Europe</th>
<th>Do not know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '22 survey</td>
<td>57,5%</td>
<td>6%</td>
<td>30,5%</td>
<td>11,4%</td>
<td>42,3%</td>
</tr>
<tr>
<td>Sept '22 survey</td>
<td>58,6%</td>
<td>3%</td>
<td>35,5%</td>
<td>7,7%</td>
<td>33,6%</td>
</tr>
<tr>
<td>Dec '22 survey</td>
<td>58,6%</td>
<td>3%</td>
<td>34,6%</td>
<td>7,7%</td>
<td>33,9%</td>
</tr>
<tr>
<td>March '23 survey</td>
<td>58,6%</td>
<td>3%</td>
<td>30,1%</td>
<td>7,7%</td>
<td>33,9%</td>
</tr>
<tr>
<td>May '23 survey</td>
<td>58,6%</td>
<td>3%</td>
<td>29,6%</td>
<td>7,7%</td>
<td>33,9%</td>
</tr>
</tbody>
</table>

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

77% of European travellers plan to take a trip during June-September. With interest in visiting a non-neighbouring country reaching the highest level (29%) since May 2022.
Q13. To which country(ies) do you plan to travel next?

PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

TOP 10 COUNTRIES

Spain 7,6%
France 7,2% 3%
Italy 7,0%
Greece 5,4%
Croatia 4,6%
Germany 4,3%
Portugal 3,8%
Czech Republic 3,2%
United Kingdom 2,9%
Austria 2,8%

*Please use this map as a reference only

No. of respondents: 4,967
While leisure remains a primary motive for travel this summer, business travel (9%) and events trips (10%) gain popularity.

Top 3 markets to take a leisure trip:
- France: 76.6%
- Belgium: 78.5%
- UK: 75.1%

Top 3 markets to take a business trip:
- Austria: 20.0%
- Switzerland: 18.7%
- Netherlands: 10.8%

Q9. For what reason are you most likely to travel within Europe next?

- For leisure
- To visit friends/relatives
- For business
- For an event (sports, festival, etc.)

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

* Statistically significant difference vs a year ago (May 2022)
Q16. What type of leisure trip within Europe are you most likely to undertake next?

Q6. Which of the following travel experiences will you look for during your next trip to Europe?

**Preferred type of leisure trip in the next six months**

- **17.9%** Sun & beach
- **13.5%** Nature & Outdoors
- **13.9%** City Break
- **5.1%** Touring / Road trip
- **12.4%** Coast & Sea
- **11.9%** Cultural & Heritage
- **7.4%** Wellness & Relaxation

**Preferred type of experiences in the next six months**

- **17.4%** Enjoy natural landscapes
- **16.3%** Gastronomic experiences
- **15.3%** Dive into local culture
- **13.6%** Sightseeing
- **13.4%** Learn about history and culture
- **8.5%** Active experiences
- **4.6%** SPA & Wellness
- **4.5%** Acquire new skills
- **2.7%** A spiritual experience
- **2.6%** Luxury shopping

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

No. of respondents: 4,165
## EUROPEANS’ MOST IN-DEMAND TRIP TYPES AND EXPERIENCES

**Travel horizon: June-November 2023**

<table>
<thead>
<tr>
<th>Age Groups Most Interested in This Type of Trip</th>
<th>Sun &amp; Beach</th>
<th>Culture &amp; Heritage</th>
<th>City Break</th>
<th>Nature &amp; Outdoors</th>
</tr>
</thead>
<tbody>
<tr>
<td>23% &gt;55</td>
<td>22% 45-54</td>
<td>30% &gt;55</td>
<td>25% 25-34</td>
<td>27% &gt;55 35-44</td>
</tr>
<tr>
<td>25% &gt;55</td>
<td>25% 25-34</td>
<td>25% &gt;55</td>
<td>27% &gt;55</td>
<td>25% &gt;55 35-44</td>
</tr>
<tr>
<td>Most Common Length of Stay &amp; Budget</td>
<td>34% 7-9 nights</td>
<td>29% 500-1000 €</td>
<td>29% 500-1000 €</td>
<td>37% 4-6 nights 500-1000 €</td>
</tr>
<tr>
<td>45% 4-6 nights</td>
<td>29% 500-1000 €</td>
<td>45% 4-6 nights</td>
<td>37% 4-6 nights 500-1000 €</td>
<td></td>
</tr>
<tr>
<td>25% 7-9 nights</td>
<td>20% 1001-1500 €</td>
<td>25% 7-9 nights</td>
<td>25% 7-9 nights 1001-1500 €</td>
<td></td>
</tr>
<tr>
<td>18% Enjoy natural landscapes</td>
<td>17% Gastronomic experiences</td>
<td>19% Sightseeing</td>
<td>25% Enjoy natural landscapes</td>
<td></td>
</tr>
<tr>
<td>17% Gastronomic experiences</td>
<td>17% Dive into local culture</td>
<td>18% Dive into local culture</td>
<td>15% Dive into local culture</td>
<td></td>
</tr>
<tr>
<td>15% Dive into local culture</td>
<td>16% Sightseeing</td>
<td>17% Gastronomic experiences</td>
<td>15% Gastronomic experiences</td>
<td></td>
</tr>
<tr>
<td>16% Sightseeing</td>
<td>16% Gastronomic experiences</td>
<td>14% Learn about history</td>
<td>13% Learn about history</td>
<td></td>
</tr>
<tr>
<td>14% Learn about history</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No. of respondents: 4,165

Analysis of preferred type of leisure trip by age, length of stay, budget and types of experiences
SNAPSHOT: AUSTRIAN TRAVEL PLANS
Travel horizon: June-November 2023

<table>
<thead>
<tr>
<th>TRAVEL SENTIMENT</th>
<th>TRAVEL PLANNING</th>
<th>PREFERRED TYPES OF TRIPS &amp; DESTINATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INTENTION TO TRAVEL</strong></td>
<td><strong>WHERE TO?</strong></td>
<td><strong>TOP 3 TYPES OF TRIPS</strong></td>
</tr>
<tr>
<td>May '23</td>
<td>Neighbouring Country</td>
<td>Sun &amp; Beach</td>
</tr>
<tr>
<td>45%</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>May '22</td>
<td>Non-Neighbouring Country</td>
<td>City Break</td>
</tr>
<tr>
<td>65%</td>
<td>22%</td>
<td>11%</td>
</tr>
<tr>
<td>May '23</td>
<td>Within My Country</td>
<td>Nature &amp; Outdoors</td>
</tr>
<tr>
<td>13%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>May '22</td>
<td>Outside Europe</td>
<td></td>
</tr>
<tr>
<td>22%</td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>TRAVEL READINESS</strong></th>
<th><strong>INTENDED LENGTH OF STAY AND BUDGET</strong></th>
<th><strong>TOP 5 EUROPEAN DESTINATIONS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination not chosen</td>
<td><strong>TRAVELLING WITH?</strong></td>
<td>Italy</td>
</tr>
<tr>
<td>21%</td>
<td>22%</td>
<td>5%</td>
</tr>
<tr>
<td>Destination chosen but trip not booked yet</td>
<td></td>
<td>Germany</td>
</tr>
<tr>
<td>13%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Trip fully booked</td>
<td></td>
<td>Croatia</td>
</tr>
<tr>
<td>40%</td>
<td>14%</td>
<td>4%</td>
</tr>
<tr>
<td>Trip partially booked</td>
<td></td>
<td>Norway</td>
</tr>
<tr>
<td>23%</td>
<td>14%</td>
<td>4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>POPULAR TRAVEL PERIODS</th>
<th>INTENDED LENGTH OF STAY AND BUDGET</th>
<th>Serbia</th>
</tr>
</thead>
<tbody>
<tr>
<td>June-July '23</td>
<td>Up to 3 nights</td>
<td>21%</td>
</tr>
<tr>
<td>August-September '23</td>
<td>4-6 nights</td>
<td>29%</td>
</tr>
<tr>
<td>October-November '23</td>
<td>7-9 nights</td>
<td>18%</td>
</tr>
</tbody>
</table>

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

* 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: BELGIAN TRAVEL PLANS
Travel horizon: June-November 2023

## Travel Sentiment

### Intention to Travel

<table>
<thead>
<tr>
<th></th>
<th>May '23</th>
<th>May '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>79%</td>
<td>73%</td>
</tr>
<tr>
<td>Neutral</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

## Travel Planning

### Where To?

- **Neighbouring Country**: 36%
- **Non-Neighbouring Country**: 32%
- **Within My Country**: 16%
- **Outside Europe**: 11%

### Travelling With?

- **Solo**: 14%
- **38% with family**
- **5% with partner**

## Travel Readiness

- **Trip fully booked**: 35%
- **Trip partially booked**: 26%
- **Destination chosen but trip not booked yet**: 23%
- **Destination not chosen**: 16%

## Popular Travel Periods

- **40%**: June-July '23
- **39%**: August-September '23
- **10%**: October-November '23

## Intended Length of Stay and Budget

<table>
<thead>
<tr>
<th>Length of Stay</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 3 nights</td>
<td>16%</td>
</tr>
<tr>
<td>4-6 nights</td>
<td>34%</td>
</tr>
<tr>
<td>7-9 nights</td>
<td>25%</td>
</tr>
<tr>
<td>10-12 nights</td>
<td>12%</td>
</tr>
<tr>
<td>Over 12 nights</td>
<td>13%</td>
</tr>
<tr>
<td>Up to 500€</td>
<td>17%</td>
</tr>
<tr>
<td>501-1.000€</td>
<td>26%</td>
</tr>
<tr>
<td>1.001-1.500€</td>
<td>19%</td>
</tr>
<tr>
<td>1.501-2.000€</td>
<td>15%</td>
</tr>
<tr>
<td>2.001-2.500€</td>
<td>13%</td>
</tr>
<tr>
<td>2.501-3.000€</td>
<td>6%</td>
</tr>
<tr>
<td>3.001€+</td>
<td>4%</td>
</tr>
</tbody>
</table>

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%
- **Sun & Beach**: 18%
- **City Break**: 13%

### Top 5 European Destinations

- **France**: 20% (4%* decrease vs the same time last year)
- **Spain**: 10%
- **Italy**: 9%
- **Greece**: 5%
- **Netherlands**: 5%

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

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

No. of respondents: 502 (total sample of respondents per country)
SNAPSHOT: BRITISH TRAVEL PLANS
Travel Travel horizon: June-November 2023

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>INTENTION TO TRAVEL</th>
<th>May '23</th>
<th>May '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>75%</td>
<td>68%</td>
</tr>
<tr>
<td>Neutral</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>9%</td>
<td>18%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?
- ANOTHER EUROPEAN COUNTRY: 53%
- WITHIN MY COUNTRY: 29%
- OUTSIDE EUROPE: 13%

TRAVELLING WITH?
- 40% with family
- 33% with partner
- 11% solo

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS
- Sun & Beach: 31%
- City Break: 18%
- Coast & Sea: 12%

TOP 5 EUROPEAN DESTINATIONS**
- Spain: 16%
- France: 9%
- Italy: 8%
- Greece: 7%
- Germany: 5%

TRAVEL READINESS
- Destination not chosen: 22%
  - Trip fully booked: 31%
  - Trip partially booked: 49%
  - Destination chosen but trip not booked yet: 24%

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 16%
- 4-6 nights: 33%
- 7-9 nights: 32%
- 10-12 nights: 9%
- Over 12 nights: 11%

- Up to 500€: 20%
- 501-1,000€: 30%
- 1,001-1,500€: 23%
- 1,501-2,000€: 12%
- 2,001-2,500€: 6%
- 2,501-3,000€: 4%
- Over 3,000€: 5%

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

* 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: DUTCH TRAVEL PLANS
Travel horizon: June-November 2023

### TRAVEL SENTIMENT

#### INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '23</td>
<td>73%</td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td>May '22</td>
<td>78%</td>
<td>13%</td>
<td>9%</td>
</tr>
</tbody>
</table>

#### TRAVEL PLANNING

- **WHERE TO?**
  - Neighbouring Country: 23%
  - Non-Neighbouring Country: 39%
  - Within My Country: 19%
  - Outside Europe: 16%

- **TRAVELLING WITH?**
  - With partner: 36%
  - With family: 26% (14%* decrease)
  - Solo: 12% (9%* decrease)

### TRAVEL READINESS

- Destination not chosen: 15%
- Destination chosen but trip not booked yet: 23%
- Trip partially booked: 10%
- Trip fully booked: 32%

### POPULAR TRAVEL PERIODS

- June-July '23: 33%
- August-September '23: 38% (5%* increase)
- October-November '23: 20% (8%* decrease)

### INTENDED LENGTH OF STAY AND BUDGET

- **WHERE TO?**
  - Up to 3 nights: 14%
  - 4-6 nights: 27%
  - 7-9 nights: 28%
  - 10-12 nights: 16%
  - Over 12 nights: 15%

- **TRAVELLING WITH?**
  - Up to 500€: 11%
  - 501-1,000€: 8% (21%* decrease)
  - 1,001-1,500€: 19% (16%* decrease)
  - 1,501-2,000€: 16% (6%* decrease)
  - 2,001-2,500€: 15% (7%* decrease)
  - 2,501-3,000€: 12% (6%* decrease)
  - Over 3,000€: 6%

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

### PREFERRED TYPES OF TRIPS & DESTINATIONS

- **TOP 3 TYPES OF TRIPS**
  - Nature & Outdoors: 19%
  - City Break: 15%
  - Sun & Beach: 15% (12%* decrease)

- **TOP 5 EUROPEAN DESTINATIONS**
  - France: 8% (4%* decrease)
  - Spain: 7% (6%* decrease)
  - Italy: 6%
  - Germany: 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: 500 (total sample of respondents per country)
**SNAPSHOT: FRENCH TRAVEL PLANS**  
Travel horizon: June-November 2023

### Intention to Travel

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '23</td>
<td>80% ▲ 7%*</td>
<td>6% ▼ 14%</td>
<td></td>
</tr>
<tr>
<td>May '22</td>
<td>73%</td>
<td>10% ▲ 17%</td>
<td></td>
</tr>
</tbody>
</table>

### Travel Readiness

- **Destination not chosen**: 22%  
- **Trip fully booked**: 25%  
- **Destination chosen but trip not booked yet**: 28%  
- **Trip partially booked**: 25%

### Popular Travel Periods

- June-July '23: 32%  
- August-September '23: 41%  
- October-November '23: 15%

### Intended Length of Stay and Budget

- **Up to 3 nights**: 11%  
- **4-6 nights**: 29%  
- **7-9 nights**: 13%  
- **10-12 nights**: 11%  
- **Over 12 nights**: 16%

- **Up to 500€**: 16%  
- **501-1,000€**: 29%  
- **1,001-1,500€**: 20%  
- **1,501-2,000€**: 16%  
- **2,001-2,500€**: 8%  
- **2,501-3,000€**: 6%  
- **Over 3,000€**: 5%

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

### Top 3 Types of Trips

- **Culture & Heritage**: 26% ▲ 7%*  
- **Sun & Beach**: 18%  
- **Coast & Sea**: 14%

### Top 5 European Destinations**

- **Italy**: 12%  
- **Spain**: 10%  
- **Greece**: 9%  
- **Portugal**: 8%  
- **Croatia**: 6%  

* 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: GERMAN TRAVEL PLANS
Travel horizon: June-November 2023

### INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '23</td>
<td>62%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>May '22</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### TRAVEL READINESS

- Destination not chosen: 13%
- Trip fully booked: 35%
- Trip partially booked: 37%
- Destination chosen but trip not booked yet: 22%

### POPULAR TRAVEL PERIODS

- June-July '23: 37%
- August-September '23: 41%
- October-November '23: 20%

### TRAVEL PLANNING

#### WHERE TO?

- Neighbouring Country: 28%
- Non-Neighbouring Country: 28%
- Within My Country: 23%
- Outside Europe: 9%

#### TRAVELLING WITH?

- With partner: 29%
- With family: 25%
- Solo: 15%

#### INTENDED LENGTH OF STAY AND BUDGET

<table>
<thead>
<tr>
<th>Length of Stay</th>
<th>Budget (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 3 nights</td>
<td>Up to 500</td>
</tr>
<tr>
<td>4-6 nights</td>
<td>501-1,000</td>
</tr>
<tr>
<td>7-9 nights</td>
<td>1,001-1,500</td>
</tr>
<tr>
<td>10-12 nights</td>
<td>1,501-2,000</td>
</tr>
<tr>
<td>Over 12 nights</td>
<td>2,001-2,500</td>
</tr>
<tr>
<td></td>
<td>2,501-3,000</td>
</tr>
<tr>
<td></td>
<td>Over 3,000€+</td>
</tr>
</tbody>
</table>

### PREFERRED TYPES OF TRIPS & DESTINATIONS

#### TOP 3 TYPES OF TRIPS

- Nature & Outdoors: 18%
- Sun & Beach: 15%
- Coast & Sea: 13%

#### TOP 5 EUROPEAN DESTINATIONS**

<table>
<thead>
<tr>
<th>Country</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>6%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>6%</td>
</tr>
<tr>
<td>Spain</td>
<td>5%</td>
</tr>
<tr>
<td>Cyprus</td>
<td>5%</td>
</tr>
<tr>
<td>Austria</td>
<td>4%</td>
</tr>
</tbody>
</table>

* 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: ITALIAN TRAVEL PLANS
Travel horizon: June-November 2023

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th></th>
<th>May '23</th>
<th>May '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>72%</td>
<td>77%</td>
</tr>
<tr>
<td>Neutral</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>

INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th></th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '23</td>
<td>72%</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>May '22</td>
<td>77%</td>
<td>10%</td>
<td>13%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 24%
- Non-Neighbouring Country: 28%
- Within My Country: 32%
- Outside Europe: 13%

TRAVELLING WITH?

- Neighbouring Country: 37% with partner
- Non-Neighbouring Country: 29% with family
- Outside Europe: 9% with family
- Within My Country: 12% solo

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 17%
- 4-6 nights: 24%
- 7-9 nights: 10%
- 10-12 nights: 9%
- Over 12 nights: 16%
- Up to 500€: 27%
- 501-1,000€: 17%
- 1,001-1,500€: 12%
- 1,501-2,000€: 12%
- 2,001-2,500€: 9%
- 2,501-3,000€: 5%
- 3,001€+: 7%

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: 15%
  - Coast & Sea: 13%

- Top 5 European Destinations:
  - Spain: 12%
  - France: 11%
  - Greece: 7%
  - Germany: 6%
  - Austria: 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: POLISH TRAVEL PLANS
Travel horizon: June-November 2023

**TRAVEL SENTIMENT**

**INTENTION TO TRAVEL**

- May '23: 74% Likely/Very Likely, 13% Neutral, 8% Unlikely/Very Unlikely
- June '22: 87% Likely/Very Likely, 10% Neutral, 3% Unlikely/Very Unlikely

**TRAVEL PLANNING**

- **WHERE TO?**
  - Neighbouring Country: 24%
  - Non-Neighbouring Country: 31%
  - Within My Country: 24%
  - Outside Europe: 9%

- **TRAVELLING WITH?**
  - 38% with family
  - 8% with partner
  - 9% solo

**TRAVEL READINESS**

- Destination not chosen: 16%
- Destination chosen but trip not booked yet: 34%
- Trip partially booked: 9%
- Trip fully booked: 31%

**POPULAR TRAVEL PERIODS**

- June-July '23: 43%
- August-September '23: 32%
- October-November '23: 14%

**INTENDED LENGTH OF STAY AND BUDGET**

- **Up to 3 nights:** 38%
- **4-6 nights:** 25%
- **7-9 nights:** 13%
- **10-12 nights:** 10%
- **Over 12 nights:** 9%

- **Up to 500€:** 9%
- **501-1,000€:** 24%
- **1,001-1,500€:** 11%
- **1,501-2,000€:** 17%
- **2,001-2,500€:** 16%
- **2,501-3,000€:** 12%
- **Over 3,000€:** 8%

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

**PREFERRED TYPES OF TRIPS & DESTINATIONS**

- **TOP 3 TYPES OF TRIPS**
  - City Break: 22%
  - Coast & Sea: 15%
  - Culture & Heritage: 13%

- **TOP 5 EUROPEAN DESTINATIONS**
  - Italy: 10%
  - Croatia: 9%
  - France: 6%
  - Czech Republic: 6%
  - Spain: 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: SPANISH TRAVEL PLANS
Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Likely/Very Likely vs Neutral</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '23</td>
<td>71%</td>
<td>8%</td>
<td>+9%</td>
</tr>
<tr>
<td>May '22</td>
<td>79%</td>
<td>10%</td>
<td>+2%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 33%
- Non-Neighbouring Country: 20%
- Within My Country: 31%
- Outside Europe: 10%

TRAVELLING WITH?

- 39% with partner
- 30% with family
- 9% solo

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 14% (2022: 16%)
- 4-6 nights: 22% (2022: 22%)
- 7-9 nights: 10% (2022: 7%)
- 10-12 nights: 10% (2022: 16%)
- Over 12 nights: 7% (2022: 10%)

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

- Up to 500€: 14% (2022: 13%)
- 501-1,000€: 22% (2022: 16%)
- 1,001-1,500€: 18% (2022: 13%)
- 1,501-2,000€: 17% (2022: 17%)
- 2,001-2,500€: 7% (2022: 16%)
- Over 2,500€: 8% (2022: 7%)

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break: 28% (2022: 39%)
- Culture & Heritage: 16% (2022: 13%)
- Sun & Beach: 13% (2022: 13%)

TOP 5 EUROPEAN DESTINATIONS**

- France: 12% (2022: 8%)
- Italy: 10% (2022: 10%)
- Germany: 6% (2022: 13%)
- Portugal: 6% (2022: 13%)
- UK: 5% (2022: 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: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>May '23</td>
<td>56%</td>
<td>4%</td>
<td>30%</td>
</tr>
<tr>
<td>May '22</td>
<td>53%</td>
<td>20%</td>
<td>27%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 28%
- NON-NEIGHBOURING COUNTRY: 25%
- WITHIN MY COUNTRY: 20%
- OUTSIDE EUROPE: 18%

TRAVELLING WITH?

- 27% with family
- 21% with partner
- 15% solo

TRAVEL READINESS

- Destination not chosen: 16%
- Destination chosen but trip not booked yet: 23%
- Trip fully booked: 21%
- Trip partially booked: 6%
- 40%

POPULAR TRAVEL PERIODS

- June-July '23: 33%
- August-September '23: 28%
- October-November '23: 21%

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 17%
- 4-6 nights: 24%
- 7-9 nights: 21%
- 10-12 nights: 21%
- Over 12 nights: 17%

- Up to 500€: 10%
- 501-1.000€: 16%
- 1.001-1.500€: 13%
- 1.501-2.000€: 17%
- 2.001-2.500€: 20%
- 2.501-3.000€: 13%
- Over 3.000€: 11%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 17%
- Culture & Heritage: 11%
- Nature & Outdoors: 10%

TOP 5 EUROPEAN DESTINATIONS

- Italy: 6% (4%*)
- France: 5%
- Germany: 5%
- Croatia: 5%
- Denmark: 4%

* 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)
PLANNING THE DETAILS
60% of Europeans plan multiple trips this summer and autumn, and out of them, 12% intend to take four or more trips.

Number of intended trips within Europe in the next six months

- None: 3.5%
- Don’t know yet: 6.6%
- 1 trip: 30.3%
- 2 trips: 33.2%
- 3 trips: 14.5%
- 4 trips: 6.2%
- 5+ trips: 3.5%

May '23 survey

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

- With my partner: 35.3%
- With my family: 34.7%
- With friends: 32.1%
- By myself: 28.9%

No. of respondents: 4,165

Q8. How many trips do you plan to take in the next 6 months, within Europe?

* Statistically significant difference vs a year ago (May 2022)
The share of Europeans who plan to use public transportation in their next trip reaches an all-time high (16%) while driving a personal car slumps by -10% compared to a year ago.

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

- UK: 68.8% (↑ 6%)
- France: 57.0% (↑ 10%)
- Spain: 65.4%
- Poland: 49.2%
- Italy: 57.8%

Q13. Which of the following modes of transport would you most consider using during your next trip within Europe?

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

*Statistically significant difference vs a year ago (May 2022)
**Up to September '22, 'By train/bus' was recorded as one answer

No. of respondents: 4,165
Europeans plan to enjoy similar lengths of holidays as last year, while the share of travellers planning to spend over 1,500 euros increases by 8%, perhaps due to the soaring rise in travel costs.

### Intended length of stay (nights)

- **Up to 3 nights**: May '22 survey: 15%, May '23 survey: 14%
- **4-6 nights**: May '22 survey: 34%, May '23 survey: 36%
- **7-9 nights**: May '22 survey: 27%, May '23 survey: 27%
- **10-12 nights**: May '22 survey: 12%, May '23 survey: 12%
- **Over 12 nights**: May '22 survey: 12%, May '23 survey: 12%

### Planned budget

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

<table>
<thead>
<tr>
<th>Intended Length of Stay</th>
<th>May '22 survey</th>
<th>May '23 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 3 nights</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>4-6 nights</td>
<td>34%</td>
<td>36%</td>
</tr>
<tr>
<td>7-9 nights</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>10-12 nights</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Over 12 nights</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Range</th>
<th>May '22 survey</th>
<th>May '23 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 500 euros</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>501-1,000 euros</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>1,001-1,500 euros</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>1,501-2,000 euros</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>2,001-2,500 euros</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>2,501-3,000 euros</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Over 3,000 euros</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>

### FINANCIAL CONCERNS AND TRAVEL BUDGETS

39% of Europeans with a planned budget of up to 1,000 Euros are concerned with the economic situation, compared to only 22% of Europeans with a travel budget over 2,000 Euros.

Q17. What would be the length of your next overnight trip?

Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,165
## BUDGET ALLOCATION BY TRIP LENGTH

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

<table>
<thead>
<tr>
<th>Budget Range</th>
<th>&lt; 3 nights</th>
<th>4-6 nights</th>
<th>7-9 nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 500 euros</td>
<td>36%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>501 - 1,000 euros</td>
<td>28%</td>
<td>30%</td>
<td>26%</td>
</tr>
<tr>
<td>1,001 - 1,500 euros</td>
<td>13%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>1,501 - 2,000 euros</td>
<td>8%</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>2,001 - 2,500 euros</td>
<td>4%</td>
<td>11%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Compared to ‘high-spending’ Europeans with a travel budget of more than 2,000 euros, those who plan to spend up to 1,000 euros are more likely to:

- Travel off-season (31% vs. 24% of ‘high-spenders’)
- Visit destinations that are perceived as cheaper (29% vs. 21% of ‘high-spenders’)
- Fly with low-cost airlines (23% vs. 16% of ‘high-spenders’)

No. of respondents: 4,165

Q17. What would be the length of your next overnight trip?
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?
The older the travellers are, the higher their budgets and lengths of stay at the destination: Gen X (aged 45-54) and Baby Boomers (aged >54) plan to spend the most and stay longer.

**Intended length of stay (nights)**

- **18 - 24 years**:
  - Gen X: 12.4%
  - Baby Boomers: 13.5%
- **25 - 34 years**:
  - Gen X: 8.3%
  - Baby Boomers: 17.0%
- **35 - 44 years**:
  - Gen X: 9.1%
  - Baby Boomers: 24.3%
- **45 - 54 years**:
  - Gen X: 11.4%
  - Baby Boomers: 36.9%
- **> 54 years**:
  - Gen X: 10.9%
  - Baby Boomers: 30.3%

**Envisaged budget**

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

- **Gen X (aged 45-54)**
  - Over 3,000 euros: 8.2%
  - 2,501 - 3,000 euros: 7.2%
  - 2,001 - 2,500 euros: 6.0%
  - 1,501 - 2,000 euros: 6.0%
  - 1,001 - 1,500 euros: 5.7%
  - 501 - 1,000 euros: 6.5%
  - Up to 500 euros: 6.5%

- **Baby Boomers (aged >54)**
  - Over 3,000 euros: 18.6%
  - 2,501 - 3,000 euros: 17.4%
  - 2,001 - 2,500 euros: 16.0%
  - 1,501 - 2,000 euros: 15.3%
  - 1,001 - 1,500 euros: 14.7%
  - 501 - 1,000 euros: 14.0%
  - Up to 500 euros: 14.0%

No. of respondents: 4,165
An increasing number of Europeans opt for stays in short-term rentals (17%), while preference for hotels drops below the 50% threshold.

Q14. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

<table>
<thead>
<tr>
<th>Type of Accommodation</th>
<th>May '23 Survey</th>
<th>Mar '23 Survey</th>
<th>Dec '22 Survey</th>
<th>Sept '22 Survey</th>
<th>May '22 Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain or resort</td>
<td>26.2%</td>
<td>27.8%</td>
<td>28.8%</td>
<td>28.7%</td>
<td>27.4%</td>
</tr>
<tr>
<td>Independent hotel/resort</td>
<td>23.3%</td>
<td>24.1%</td>
<td>26.2%</td>
<td>26.7%</td>
<td>24.4%</td>
</tr>
<tr>
<td>Short-term rental via online platform</td>
<td>17.2%</td>
<td>15.3%</td>
<td>15.7%</td>
<td>15.8%</td>
<td>15.3%</td>
</tr>
<tr>
<td>Friends and/or family</td>
<td>10.3%</td>
<td>10.8%</td>
<td>11.1%</td>
<td>11.5%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Other paid serviced accommodation (bed and breakfast, etc.)</td>
<td>9.4%</td>
<td>8.9%</td>
<td>8.2%</td>
<td>7.3%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Hostel/motel</td>
<td>6.4%</td>
<td>5.9%</td>
<td>4.2%</td>
<td>3.8%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Camping/caravan</td>
<td>5.9%</td>
<td>5.7%</td>
<td>4.7%</td>
<td>4.8%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Other</td>
<td>3.4%</td>
<td>2.6%</td>
<td>1.1%</td>
<td>0.5%</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

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

31% of Europeans booking short-term rentals will opt for less expensive restaurants and self-catering options, compared to 25% of travellers who prefer hotels.

*No statistically significant difference vs a year ago (May 2022)*

No. of respondents: 4,165
European travellers are becoming more proactive in relation to their trip bookings: 56% have already partially or fully booked, up by 4% compared to 2022.

**Planning status for the next trip**

<table>
<thead>
<tr>
<th>May '22 survey</th>
<th>Sept '22 survey</th>
<th>Dec '22 survey</th>
<th>March '23 survey</th>
<th>May '23 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have not yet chosen where I will travel next</td>
<td>I have chosen where I want to go but not yet booked/arranged my trip</td>
<td>I have booked/arranged the accommodation for my next trip</td>
<td>I have booked/arranged the transportation for my next trip</td>
<td>I have booked/arranged all travel and accommodation components for my next trip</td>
</tr>
<tr>
<td>32.2%</td>
<td>38.4%</td>
<td>38.2%</td>
<td>32.5%</td>
<td>28.9%</td>
</tr>
<tr>
<td>13.4%</td>
<td>17.2%</td>
<td>17.2%</td>
<td>16.1%</td>
<td>14.7%</td>
</tr>
<tr>
<td>33.7%</td>
<td>8.6%</td>
<td>10.3%</td>
<td>12.5%</td>
<td>13.1%</td>
</tr>
<tr>
<td>11.4%</td>
<td>10.0%</td>
<td>9.6%</td>
<td>10.5%</td>
<td>13.5%</td>
</tr>
<tr>
<td>9.2%</td>
<td>24.5%</td>
<td>28.5%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>53%</td>
<td>4%*</td>
<td>4%*</td>
<td>3%*</td>
<td>4%*</td>
</tr>
</tbody>
</table>

**FINANCIAL CONCERNS IGNITE CONTRADICTING BEHAVIOUR**

Europeans who have chosen their destination but not yet booked and those who have fully booked their next trip, have demonstrated a higher level of concern (47% for both) regarding rising costs of travel.

Travellers who have only booked their transportation or accommodation have shown lower levels of concern (31% and 35% respectively).

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

No. of respondents: 4,165

Q21. Please select a response which best describes the planning for your next trip:
50% of Europeans planning off-season journeys in October-November have already fully or partially booked their trip. Holidays to non-neighbouring European countries have the highest share of early booking (60%).

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

May '23 survey

* Statistically significant difference vs a year ago (May 2022)
Europeans’ top criteria for choosing a travel destination remain stable: pleasant weather, attractive deals and welcoming locals

<table>
<thead>
<tr>
<th>Top 8 criteria for choosing the next travel destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasant weather conditions</td>
</tr>
<tr>
<td>17.3%</td>
</tr>
</tbody>
</table>

For approximately one-third (31%) of Europeans gearing up for Nature & Outdoors trips in the coming months, the primary factor influencing their destination choice is the crowd level at the location.
TRAVEL CONCERNS
WHAT DO EUROPEAN TRAVELLERS WORRY ABOUT?

Increased travel costs (+6%) and the economic situation (+4%) strengthen their position as Europeans’ key concerns, while worries regarding the war in Ukraine slightly drop (-3%).

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

- **23.7%** Rise in the overall cost of my trip due to inflation
- **11.5%** The ongoing conflict between Russia and Ukraine
- **8.5%** Booking and cancellation policies (refunds, etc.)
- **6.7%** Sudden quarantine measures or changes in travel restrictions during my trip
- **16.9%** Economic situation and personal finances
- **8.6%** Too many visitors in the destinations I want to visit
- **7.6%** Extreme weather events

Top 4 markets concerned with rising travel costs:
- UK: 27%
- Poland: 27%
- Italy: 26%
- Spain: 25%

Top 4 markets concerned with personal finances:
- UK: 19%
- Spain: 18%
- Poland: 18%
- Italy: 17%

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

No. of respondents: 4,165
Q2. How has the ongoing war between Russia and Ukraine affected your plans to travel within Europe in the next 6 months?

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

- 8.6% I had not planned any overnight trips in the next six months
- 37.1% It did not affect me at all
- 10.3% I will wait and see how the war evolves before booking a trip
- 9.4% I made the trip with some changes from the initial plan (accommodation/transport)
- 8.8% I changed my trip from international to domestic
- 13.5% I changed my itinerary to avoid countries neighbouring the conflict zone
- 7.1% I rescheduled it for another date
- 5.4% I cancelled my trip completely

Top 5 markets changing their travel plans:

- Switzerland: 60.1% (15%)
- Austria: 58.6% (12%)
- Poland: 54.2% (16%)
- Germany: 51.3% (14%)
- Spain: 49.7% (17%)

Most often mentioned change: 'I changed my itinerary to avoid countries neighbouring the conflict zone.'

Despite the overall decrease in concerns regarding the Russia-Ukraine conflict, the impact of the war on Europeans’ travel-related decisions increased by +9% compared to a year ago.

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

No. of respondents: 6,000
Q19. In the context of inflation and rising travel costs, which of the following travel behaviours are you most likely to adopt before reaching your next destination?

- Off-season journeys: 17%
- More affordable destinations: 14%
- Early booking of flights: 13%
- Early booking of activities: 13%
- Low-cost flights: 12%
- Pack light: 11%
- Last-minute flight deals: 9%

No. of respondents: 4,165

AMID RISING COSTS, EUROPEANS ADAPT TRAVEL PREFERENCES AND BOOKING BEHAVIOR PRIOR TO REACHING THEIR DESTINATIONS
THE IN-DESTINATION BEHAVIOR IS ALTERED TOO TO FIT WITHIN THE AVAILABLE BUDGET

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?

- 17% LESS SHOPPING/PURCHASES
- 15% LESS EXPENSIVE ACCOMMODATION
- 15% LESS EXPENSIVE RESTAURANTS/SELF-CATERING
- 12% USE OF PUBLIC TRANSPORT OR BIKE RENTALS
- 11% AFFORDABLE ALL-INCLUSIVE PACKAGES
- 10% LESS ACTIVITIES WITH ADMISSION FEES
- 10% LESS BARS & NIGHTCLUBS

No. of respondents: 4,165
Q22. Thinking about the next six months, do you foresee any changes in your budget for each of the following categories?

The travel budget of Europeans stays firm: 69% plan to spend the same or much more than usual on travelling.

The share of travellers planning to spend more-than-usual decreases with age, from 26% among Europeans aged 18-24 to 18% among Europeans over the age of 54.

No. of respondents: 6,002
THE SURVEY

- The report is the result of online market research of Europeans who took at least two overnight trips during the last three years (2020-2022)
- Distribution/data collection period:
  - 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 / Wave 16: 8 May-4 June 2023*; sample = 6,002
- 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 (one question), travel concerns and impact of external shocks on travel (8 questions), and travel intentions, preferences and trip planning (13 questions)
- 47% of the Wave 16 survey respondents are male and 53% are female. Sample size and age groups are listed below:

<table>
<thead>
<tr>
<th>Age</th>
<th>UK</th>
<th>IT</th>
<th>ES</th>
<th>AT</th>
<th>FR</th>
<th>DE</th>
<th>PL</th>
<th>BE</th>
<th>CH</th>
<th>NL</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>88</td>
<td>70</td>
<td>44</td>
<td>91</td>
<td>96</td>
<td>92</td>
<td>56</td>
<td>89</td>
<td>87</td>
<td>82</td>
<td>795</td>
</tr>
<tr>
<td>25-34</td>
<td>136</td>
<td>112</td>
<td>73</td>
<td>99</td>
<td>128</td>
<td>152</td>
<td>106</td>
<td>101</td>
<td>114</td>
<td>149</td>
<td>1,170</td>
</tr>
<tr>
<td>35-44</td>
<td>126</td>
<td>134</td>
<td>103</td>
<td>92</td>
<td>140</td>
<td>150</td>
<td>120</td>
<td>97</td>
<td>124</td>
<td>114</td>
<td>1,200</td>
</tr>
<tr>
<td>45-54</td>
<td>138</td>
<td>168</td>
<td>105</td>
<td>104</td>
<td>146</td>
<td>168</td>
<td>92</td>
<td>113</td>
<td>94</td>
<td>87</td>
<td>1,215</td>
</tr>
<tr>
<td>≥55</td>
<td>262</td>
<td>266</td>
<td>175</td>
<td>114</td>
<td>240</td>
<td>188</td>
<td>126</td>
<td>102</td>
<td>81</td>
<td>68</td>
<td>1,622</td>
</tr>
<tr>
<td>Total</td>
<td>750</td>
<td>750</td>
<td>500</td>
<td>500</td>
<td>750</td>
<td>750</td>
<td>500</td>
<td>502</td>
<td>500</td>
<td>500</td>
<td>6,002</td>
</tr>
</tbody>
</table>

*Fieldwork in France, Belgium, the Netherlands and Switzerland stopped on May 19th and was relaunched on May 31st*
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.

Published by the European Travel Commission

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Cover photo: Photo by Ground Picture on Shutterstock
Design: MINDHAUS

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