MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

Travel horizon: October 2023 – March 2024
WAVE 17 RESEARCH HIGHLIGHTS

Europeans still want to travel, but less than a year ago – leisure trips are slightly down while business trips have increased

This report monitors sentiment and short-term plans for domestic and intra-European travel and is the 17th wave of a market research project\(^1\) which began in September 2020. Results are based on data collected in September 2023 from Europeans in 10 high-volume source markets.

- **68% of Europeans plan to travel between October 2023 and March 2024**, representing a 3% decrease compared to a year ago. The desire to travel is strongest among Europeans aged over 35 (71%) and comparatively lower (61%) among the 18-34-year-olds.

- **38% of Europeans plan to travel during the autumn months** (October-November), and another **32% during the Christmas period** (December-January).

- **Visiting a neighbouring country is the leading choice** for 32% of travellers, followed by visiting a non-neighbouring European country (28%).

- **Intentions for leisure trips** (69%) **slightly decrease** compared to a year ago (72%), while the share of travellers planning a business trip rises to 8% (+3% compared to the same period in 2022).

- With summer behind, Sun & Beach trips give way to **City Breaks** (19%), **Culture & Heritage** (17%), and **Nature & Outdoor** (14%) trips as the leading choice for the colder months.

\(^1\)The data collection and research methodology are detailed in the methodological annex (slide 43)
Use of greener transport options rises to an all-time high

• **Half of Europeans will fly** to their next travel destination. At the same time, the **use of train or bus services for travelling rises to the highest-recorded level** (17%, up by 5% compared to a year ago), serving as a greener alternative to driving (25%, down by 7% compared to 2022).

• The share of travellers planning to **spend up to 1,000 euros (44%) drops** (-9%) compared to a year ago, while the share of those with a budget of **over 1,500 euros increases by 7% (34%)**. Interestingly, the **intended length of stay remains similar to the same period last year** – despite travel price inflation.

• **4-6 nights remains the most common length of stay** for Europeans (29%). The share of travellers who plan trips for more than 7 nights increases with age - from 36% among Europeans aged 18-24 to 42% in the +54 age group.

• **Hotels remain the leading accommodation choice for 53% of Europeans and have strengthened their position compared to the summer 2023 (+3%),** being followed by short-term rentals (15%).

• **45% of travellers have partially or fully booked their next trip,** down by 11% compared to the pre-summer booking rush recorded in the previous wave (conducted in May 2023).

• **Pleasant weather (19%), attractive deals (17%) and friendly locals (12%) remain Europeans’ top criteria for choosing their next travel destination.**
Travel price inflation (22%) and personal finances (16%) top Europeans’ travel-related worries, followed by a 7% surge in concerns regarding extreme weather events (14%) compared to the summer.

As economic pressures remain, 22% of Europeans will opt for off-season trips, 13% will travel to more affordable destinations, and 13% will book activities and flights in advance.

While at the destination, 17% will limit their shopping, and 15% will select less expensive accommodation and more affordable restaurants.

Travellers aged 35-44 and those over 55 both pursue value for money actively, with the former booking flights and activities in advance and the latter favouring more affordable choices.

The ongoing war in Ukraine affected the travel plans of 37% of Europeans, and a considerable 13% will avoid countries close to the conflict zone (+3% compared to a year ago).
RECOMMENDATIONS FOR DESTINATIONS
Rise in off-season travel and less popular destinations

- Extreme weather events are now Europeans’ third biggest travel-related concern. Destinations can enhance their tourism resilience level by reviewing the destination’s crisis management plan, revamping their tourism crisis handbook, creating self-assessment crisis-readiness tools and workshops for SMEs, and launching projects for a climate-resilient infrastructure (i.e., sea walls, flood defences, managing vegetation for reducing the risk of wildfires).

- Destinations that attract the senior travel segment, especially those seeking longer stays, should prioritise promoting favourable weather conditions (32%), low crowd levels (31%), and convenient transportation options (31%) - the top criteria for this segment when selecting a destination.

- A growing share of Europeans plan to travel beyond Europe’s tourism hotspots, with a rising interest in more affordable destinations (13%). More affordable destinations are advised to highlight their price attractiveness and their offering of higher value for the travellers’ budget.

- Off-season trips are a rising trend among Europeans adapting to travel-cost inflation (22%). By launching off-season campaigns, destinations can better spread tourism loads, provide a much-desired crowd-free experience, and offer attractive deals.
RECOMMENDATIONS FOR BUSINESSES

Destinations for Christmas and New Year are chosen but not yet booked

- 44% of Europeans planning to travel around Christmas and New Year (December 2023-January 2024) have chosen their destination but have not yet booked. These travellers are more concerned by travel price inflation (49% vs 34% of Europeans who have partially/fully booked their next trip) and by the economic situation (35% vs 26%). In response to these concerns, marketing campaigns for this audience should reassure Europeans’ confidence in early booking as the right financial decision, by promoting early-bird deals and ‘book now pay later’ offers.

- As trips by train gain popularity, tourism businesses close to train stations can join efforts to create driving-free travel itineraries that match the top interests of railway travellers: enjoying nature (37%), experiencing the local culture (35%) and seeing famous landmarks (33%).

- Preference for hotel stays is higher among more mature travellers; hoteliers can target Europeans over the age of 54, emphasising the opportunity to visit famous landmarks, explore the local culture, and learn about the destination’s culture and history - in addition to the hotel experience.

- 26% of travellers concerned by their environmental footprint are aged over 54 (vs only 15% among travellers aged 18-24), and businesses with a sustainable tourism certificate could target Europeans in this more-mature age cohort.
1. Dates on the graphs refer to the following data collection periods for each research wave:

<table>
<thead>
<tr>
<th>Wave 13</th>
<th>Wave 14</th>
<th>Wave 15</th>
<th>Wave 16</th>
<th>Wave 17</th>
</tr>
</thead>
</table>

2. To present Wave 17 timings in which respondents are ‘most likely to take their next trip’, the following time periods should be used as a reference:
   - In 1-2 months: October-November 2023
   - In 3-4 months: December 2023 - January 2024
   - In 5-6 months: February - March 2024

3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents: 5,993
   - Respondents most likely to travel in the next 6 months: 4,062
   - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,852

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.

NOTE: Fieldwork for Wave 17 was conducted before the Israeli-Palestinian conflict, ignited in early October 2023
Over 2 in 3 Europeans plan to travel in the coming 6 months - a third consecutive decrease since the beginnings of 2023 and 3% below September 2022, possibly due to inflation.

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

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

- **Spain**: 75.4%
- **Poland**: 72.6%
- **Italy**: 74.7%
- **Belgium**: 65.4%
- **UK**: 73.3%

Intention to travel in the next six months:

<table>
<thead>
<tr>
<th>Country</th>
<th>Sept '22 survey</th>
<th>Dec '22 survey</th>
<th>March '23 survey</th>
<th>May '23 survey</th>
<th>Sept '23 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>15.9%</td>
<td>9.9%</td>
<td>16.5%</td>
<td>19.8%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Poland</td>
<td>14.0%</td>
<td>13.4%</td>
<td>11.3%</td>
<td>10.8%</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>70.1%</td>
<td>76.8%</td>
<td>72.3%</td>
<td>69.4%</td>
<td>67.6%</td>
</tr>
<tr>
<td>Belgium</td>
<td>7.4%</td>
<td>8%</td>
<td>3%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>UK</td>
<td>65.4%</td>
<td>67.6%</td>
<td>72.3%</td>
<td>69.4%</td>
<td>67.6%</td>
</tr>
</tbody>
</table>

*Statistically significant difference vs a year ago (Sept' 2022)
Europeans over the age of 35 are the most eager to travel; desire to travel drops by 5% among those aged 25-34

Intention to travel in the next six months by age group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Very unlikely/unlikely</th>
<th>Neutral</th>
<th>Likely/very likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>28.4%</td>
<td>65.1%</td>
<td>5.5%</td>
</tr>
<tr>
<td>25-34</td>
<td>16.1%</td>
<td>22.1%</td>
<td>6%</td>
</tr>
<tr>
<td>35-44</td>
<td>12.8%</td>
<td>11.6%</td>
<td>3%</td>
</tr>
<tr>
<td>45-54</td>
<td>11.6%</td>
<td>16.0%</td>
<td>3%</td>
</tr>
<tr>
<td>&gt;55</td>
<td>12.0%</td>
<td>17.8%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Statistically significant difference vs a year ago (Sept' 2022)
### When will Europeans travel next?

<table>
<thead>
<tr>
<th></th>
<th>Sept '22 survey</th>
<th>Dec '22 survey</th>
<th>March '23 survey</th>
<th>May '23 survey</th>
<th>Sept '23 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>In 1-2 months</td>
<td>21,0%</td>
<td>32,5%</td>
<td>33,9%</td>
<td>39,2%</td>
<td>38,4%</td>
</tr>
<tr>
<td>In 3-4 months</td>
<td>33,6%</td>
<td>40,2%</td>
<td>29,8%</td>
<td>32,2%</td>
<td>33,6%</td>
</tr>
<tr>
<td>In 5-6 months</td>
<td>38,1%</td>
<td>22,6%</td>
<td>7,4%</td>
<td>15,1%</td>
<td>9,1%</td>
</tr>
<tr>
<td>Do not know yet</td>
<td>6,7%</td>
<td>7,7%</td>
<td>7,4%</td>
<td>7,7%</td>
<td>9,1%</td>
</tr>
</tbody>
</table>

### Where will Europeans travel within the next 6 months?

<table>
<thead>
<tr>
<th></th>
<th>Sept '22 survey</th>
<th>Dec '22 survey</th>
<th>March '23 survey</th>
<th>May '23 survey</th>
<th>Sept '23 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within my country</td>
<td>38%</td>
<td>32%</td>
<td>33%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>To a neighbouring country</td>
<td>27%</td>
<td>30%</td>
<td>29%</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>To a non-neighbouring European country</td>
<td>15%</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>To destinations outside Europe</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Do not know yet</td>
<td>12%</td>
<td>4%</td>
<td>7%</td>
<td>6%</td>
<td>9%</td>
</tr>
</tbody>
</table>

38% of Europeans plan to travel in the autumn months (October-November 2023); visiting a neighbouring country is the preferred choice (32%), slightly down compared to a year ago (-3%).

Q10. When are you most likely to go on your next trip either in your country or within Europe?

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

*Statistically significant difference vs a year ago (Sept’ 2022)*

No. of respondents: 4,052
PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

TOP 10 COUNTRIES

France  7.4%
Italy   7.0%
Spain   6.8%
Germany 5.7%
Greece  4.4%
Austria 3.8%
Croatia 3.7%
Czech Republic 3.7%
Portugal 3.7%
United Kingdom 3.2%

* Please use this map as a reference only
No. of respondents: 4,852
Top 3 markets to take a leisure trip

- Italy: 78.6%
- UK: 76.4%
- Poland: 73%

Top 3 markets to take a business trip

- Germany: 11.7% (5%*)
- Spain: 11.5% (5%*)
- Switzerland: 11%

Business trips register a 3% annual increase, mainly driven by German, Spanish and Swiss travellers.

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

For leisure
- Sept '22 survey: 72.1%
- Dec '22 survey: 72.1%
- March '23 survey: 69.1%
- May '23 survey: 67.6%
- Sept '23 survey: 69.1%

To visit friends/relatives
- Sept '22 survey: 6.5%
- Dec '22 survey: 6.7%
- March '23 survey: 8.1%
- May '23 survey: 9.6%
- Sept '23 survey: 7.8%

For an event (sports, festival, etc.)
- Sept '22 survey: 5%
- Dec '22 survey: 5%
- March '23 survey: 5%
- May '23 survey: 5%
- Sept '23 survey: 3%

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

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

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

No. of respondents: 4,052
City Breaks, Culture & Heritage travels, and Nature & Outdoors getaways continue to hold sway as the most sought-after holiday types among Europeans in the coming months.
## EUROPEANS’ MOST IN-DEMAND TRIP TYPES AND EXPERIENCES

**Travel horizon: October 2023 - March 2024**

<table>
<thead>
<tr>
<th></th>
<th>City Break</th>
<th>Culture &amp; Heritage</th>
<th>Nature &amp; Outdoors</th>
<th>Sun &amp; Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP</strong></td>
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<tr>
<td>&gt;55</td>
<td>27%</td>
<td>21%</td>
<td>29%</td>
<td>24%</td>
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<td>25-34</td>
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<td>45-54</td>
<td>36%</td>
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<table>
<thead>
<tr>
<th><strong>MOST COMMON LENGTH OF STAY &amp; BUDGET</strong></th>
<th>City Break</th>
<th>Culture &amp; Heritage</th>
<th>Nature &amp; Outdoors</th>
<th>Sun &amp; Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-6 nights</td>
<td>45%</td>
<td>36%</td>
<td>41%</td>
<td>31%</td>
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<td>500-1000 €</td>
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<td>500-1000 €</td>
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<tr>
<td>Up to 3 nights</td>
<td>36%</td>
<td>21%</td>
<td>28%</td>
<td>31%</td>
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<td>500-1000 €</td>
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<td>Up to 500 €</td>
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<table>
<thead>
<tr>
<th><strong>TOP 4 EXPERIENCES TO TRY</strong></th>
<th>City Break</th>
<th>Culture &amp; Heritage</th>
<th>Nature &amp; Outdoors</th>
<th>Sun &amp; Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>20%</td>
<td></td>
<td>26%</td>
<td>19%</td>
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<tr>
<td>Learn about history</td>
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<td></td>
<td>15%</td>
<td></td>
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<tr>
<td>Dive into local culture</td>
<td>17%</td>
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<td>15%</td>
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<tr>
<td>Gastronomic experiences</td>
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<td>17%</td>
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<tr>
<td>Enjoy natural landscapes</td>
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<td>14%</td>
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<td>18%</td>
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</tbody>
</table>

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

No. of respondents: 4,052
SNAPSHOT: AUSTRIAN TRAVEL PLANS
Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>INTENTION TO TRAVEL</th>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>63%</td>
<td>59%</td>
</tr>
<tr>
<td>Neutral</td>
<td>4%</td>
<td>20%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>14%</td>
<td>21%</td>
</tr>
</tbody>
</table>

| TRAVEL PLANNING            |          |
| WHERE TO?                  |          |
| Neighbouring Country      | 32%      |
| Non-Neighbouring Country  | 21%      |
| Within My Country          | 20%      |
| Outside Europe             | 14%      |

| TRAVELLING WITH?           |          |
| Trip fully booked          | 33%      |
| Trip partially booked      | 4%       |
| Destination chosen but trip not booked yet | 31% |
| Destination not chosen     | 13%      |

* Significant increase or decrease vs the same time last year

TRAVEL READINESS

POPULAR TRAVEL PERIODS

- October-November '23: 37%
- December '23-January '24: 29%
- February-March '24: 16%

TRAVELLING WITH?

<table>
<thead>
<tr>
<th>TRAVELLING WITH</th>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip fully booked with partner</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Trip partially booked with partner</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Destination chosen but trip not booked yet</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Destination not chosen</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 32% of Sept '22
- 4-6 nights: 33% of Sept '22
- 7-9 nights: 16% of Sept '22
- 10-12 nights: 8% of Sept '22
- Over 12 nights: 5% of Sept '22

- Up to 500€: 26% of Sept '22
- 501-1.000€: 6% of Sept '22
- 1.001-1.500€: 18% of Sept '22
- 1.501-2.000€: 10% of Sept '22
- 2.001-2.500€: 7% of Sept '22
- 2.501-3.000€: 5% of Sept '22
- 3.001€+: 6% of Sept '22

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

PREFERRED TYPES OF TRIPS

- City Break: 21%
- Nature & Outdoors: 14%
- Wellness & Relaxation: 14%

NEW TO THE QUESTIONNAIRE

<table>
<thead>
<tr>
<th>TOP 3 TYPES OF TRIPS</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>City Break</td>
<td>21%</td>
</tr>
<tr>
<td>Nature &amp; Outdoors</td>
<td>14%</td>
</tr>
<tr>
<td>Wellness &amp; Relaxation</td>
<td>14%</td>
</tr>
</tbody>
</table>

TOP 5 EUROPEAN DESTINATIONS**

- Germany: 12%
- Italy: 8%
- Croatia: 6%
- Hungary: 5%
- France: 5%

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

No. of respondents: 500 (total sample of respondents per country)
SNAPSHOT: BELGIAN TRAVEL PLANS
Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>Intention to Travel</th>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>65%</td>
<td>73%</td>
</tr>
<tr>
<td>Neutral</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>21%</td>
<td>13%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 31%
- Non-neighbouring Country: 28%
- Within My Country: 20%
- Outside Europe: 11%

TRAVELLING WITH?

- 33% with partner
- 24% with family
- 13% solo

INTENDED LENGTH OF STAY AND BUDGET

<table>
<thead>
<tr>
<th>Intended 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>

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

<table>
<thead>
<tr>
<th>Top 3 Types of Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature &amp; Outdoors</td>
</tr>
<tr>
<td>Sun &amp; Beach</td>
</tr>
<tr>
<td>City Break</td>
</tr>
</tbody>
</table>

TOP 5 EUROPEAN DESTINATIONS**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>14%</td>
</tr>
<tr>
<td>Italy</td>
<td>7%</td>
</tr>
<tr>
<td>Spain</td>
<td>5%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>5%</td>
</tr>
<tr>
<td>Germany</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: 500 (total sample of respondents per country)
SNAPSHOT: BRITISH TRAVEL PLANS
Travel horizon: October 2023-March 2024

**INTENTION TO TRAVEL**

- Sept '23: 73% Likely/Very Likely, 12% Neutral, 15% Unlikely/Very Unlikely
- Sept '22: 71% Likely/Very Likely, 14% Neutral, 15% Unlikely/Very Unlikely

**TRAVEL READINESS**

- Destination not chosen: 28%
- Trip fully booked: 25%
- Trip partially booked: 32%
- Destination chosen but trip not booked yet: 15%

**POPULAR TRAVEL PERIODS**

- October-November '23: 32%
- December '23-January '24: 29%
- February-March '24: 19%

**WHERE TO?**

- Another European Country: 55%
- Within My Country: 29%
- Outside Europe: 11%

**TRAVELLING WITH?**

- 42% with partner
- 33% with family
- 12% solo
- 3%* with partner
- 4%* with family
- 4%* solo

**INTENDED LENGTH OF STAY AND BUDGET**

- Up to 3 nights: 21%
- 4-6 nights: 38%
- 7-9 nights: 24%
- 10-12 nights: 9%
- Over 12 nights: 8%
- Up to 500€: 21%
- 501-1,000€: 33%
- 1,001-1,500€: 21%
- 1,501-2,000€: 11%
- 2,001-2,500€: 7%
- 2,501-3,000€: 3%
- 3,001€+: 4%

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

**TOP 3 TYPES OF TRIPS**

- City Break: 18%
- Sun & Beach: 31%
- Culture & Heritage: 13%

**TOP 5 EUROPEAN DESTINATIONS**

- Spain: 13%
- France: 10%
- Italy: 9%
- Greece: 7%
- Türkiye: 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: DUTCH TRAVEL PLANS
Travel horizon: October 2023-March 2024

**TRAVEL SENTIMENT**

<table>
<thead>
<tr>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>62%</td>
<td>61%</td>
</tr>
<tr>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td>23%</td>
<td>18%</td>
</tr>
</tbody>
</table>

* Likely/Very Likely  Neutral  Unlikely/Very Unlikely

**TRAVEL PLANNING**

<table>
<thead>
<tr>
<th>WHERE TO?</th>
<th>TRAVELLING WITH?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neighbouring Country</td>
<td>22% 3%*</td>
</tr>
<tr>
<td>Non-Neighbouring Country</td>
<td>38% 4%*</td>
</tr>
<tr>
<td>Within My Country</td>
<td>19%</td>
</tr>
<tr>
<td>Outside Europe</td>
<td>11%</td>
</tr>
</tbody>
</table>

38% with partner  26% with family  16% solo

**TRAVEL READINESS**

- Destination not chosen: 27% (20% up)
- Destination chosen but trip not booked yet: 26% (12% up)
- Trip partially booked: 29% (18% up)
- Trip fully booked: 9% (11% up)

**TOP 3 TYPES OF TRIPS**

- Nature & Outdoors 21%
- City Break 18% (3% down)
- Sun & Beach 16%

**POPULAR TRAVEL PERIODS**

- October-November '23: 28% (26% up)
- December '23-January '24: 24% (20% up)
- February-March '24: 26% (26% up)

**INTENDED LENGTH OF STAY AND BUDGET**

- Up to 3 nights: 3% (8% down)
- 4-6 nights: 18% (1% up)
- 7-9 nights: 31% (2% up)
- 10-12 nights: 27% (4% up)
- Over 12 nights: 12% (12% up)

- Up to 500€: 14% (8% up)
- 501-1.000€: 26% (6% up)
- 1.001-1.500€: 22% (13% up)
- 1.501-2.000€: 13% (11% up)
- 2.001-2.500€: 8% (7% up)
- 2.501-3.000€: 7% (3% up)

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

**TOP 5 EUROPEAN DESTINATIONS**

- Germany: 10%
- France: 8%
- Belgium: 7%
- Spain: 7% (3% up)
- Austria: 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: October 2023-March 2024

**TRAVEL SENTIMENT**

<table>
<thead>
<tr>
<th>Intention to Travel</th>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>63%</td>
<td>67%</td>
</tr>
<tr>
<td>Neutral</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>25%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**TRAVEL PLANNING**

<table>
<thead>
<tr>
<th>Where to?</th>
<th>Neighbouring Country</th>
<th>Non-Neighbouring Country</th>
<th>Within My Country</th>
<th>Outside Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>31%</td>
<td></td>
<td></td>
<td></td>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travelling with?</th>
<th>36% with partner</th>
<th>5%*</th>
<th>30% with family</th>
<th>11%*</th>
<th>13% solo</th>
<th>7%*</th>
</tr>
</thead>
</table>

**TRAVEL READINESS**

<table>
<thead>
<tr>
<th>Destination not chosen</th>
<th>29%</th>
<th>32%</th>
<th>25%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip fully booked</td>
<td>14%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Trip partially booked</td>
<td>7%</td>
<td>25%</td>
<td>3%</td>
</tr>
<tr>
<td>Destination chosen but trip not booked yet</td>
<td>29%</td>
<td>14%</td>
<td>32%</td>
</tr>
</tbody>
</table>

**POPULAR TRAVEL PERIODS**

- October-November '23: 22%
- December '23-January '24: 26%
- February-March '24: 29%

**PREFERRED TYPES OF TRIPS & DESTINATIONS**

**TOP 3 TYPES OF TRIPS**

- Culture & Heritage: 23%
- Nature & Outdoors: 16%
- Sun & Beach: 13%

**TOP 5 EUROPEAN DESTINATIONS**

- Italy: 9% (4%*)
- Spain: 7% (4%*)
- Greece: 6% (4%*)
- Portugal: 5%
- Croatia: 4%

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: GERMAN TRAVEL PLANS
Travel horizon: October 2023-March 2024

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>Sept '23</td>
<td>62%</td>
<td>13%</td>
<td>24%</td>
</tr>
<tr>
<td>Sept '22</td>
<td>71%</td>
<td>14%</td>
<td>16%</td>
</tr>
</tbody>
</table>

**TRAVEL READINESS**

- Destination not chosen: 17%
- Trip fully booked: 5%
- Destination chosen but trip not booked yet: 30%
- Trip partially booked: 15%

**POPULAR TRAVEL PERIODS**

- 34% in October-November '23
- 27% in December '22-January '24
- 21% in February-March '24

**TRAVEL PLANNING**

**WHERE TO?**

- Neighbouring Country: 27%
- Non-Neighbouring Country: 27%
- Within My Country: 9%
- Outside Europe: 24%

**TRAVELLING WITH?**

- 31% with partner
- 23% with family
- 17% solo

**INTENDED LENGTH OF STAY AND BUDGET**

- Up to 3 nights: 19%
- 4-6 nights: 30%
- 7-9 nights: 21%
- 10-12 nights: 15%
- Over 12 nights: 14%

- Up to 500€: 6%
- 501-1,000€: 10%
- 1,001-1,500€: 17%
- 1,501-2,000€: 18%
- 2,001-2,500€: 24%
- 2,501-3,000€: 14%
- Over 3,000€: 9%

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

**PREFERRED TYPES OF TRIPS & DESTINATIONS**

**TOP 3 TYPES OF TRIPS**

- Nature & Outdoors: 15%
- Sun & Beach: 15%
- City Break: 14%

**TOP 5 EUROPEAN DESTINATIONS**

- Spain: 6%
- Italy: 6%
- Czech Republic: 6%
- Austria: 6%
- France: 5%

* Significant increase \(\uparrow\) or decrease \(\downarrow\) 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: October 2023-March 2024

### TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>Intention to Travel</th>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>75%</td>
<td>72%</td>
</tr>
<tr>
<td>Neutral</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>13%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### TRAVEL PLANNING

#### Where to?

- Neighbouring Country: 24%
- Non-Neighbouring Country: 29%
- Within My Country: 33%
- Outside Europe: 7%

#### Travelling With?

- With partner: 38%
- With family: 33%
- Solo: 8%

### TRAVEL READINESS

- Destination not chosen: 14%
- Trip fully booked: 37%
- Trip partially booked: 9%
- Destination chosen but trip not booked yet: 15%

### POPULAR TRAVEL PERIODS

- October-November '23: 30%
- December '23-January '24: 32%
- February-March '24: 20%

### INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 7%
- 4-6 nights: 18%
- 7-9 nights: 5%
- 10-12 nights: 6%
- Over 12 nights: 3%

- Up to 500€: 7%
- 501-1.000€: 32%
- 1.001-1.500€: 23%
- 1.501-2.000€: 12%
- 2.001-2.500€: 7%
- 2.501-3.000€: 5%
- Over 3.000€: 4%

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

### PREFERRED TYPES OF TRIPS & DESTINATIONS

#### Top 3 Types of Trips

- Culture & Heritage: 36%
- Nature & Outdoors: 12%
- Wellness & Relaxation: 9%

#### Top 5 European Destinations**

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>10%</td>
</tr>
<tr>
<td>Spain</td>
<td>10%</td>
</tr>
<tr>
<td>Germany</td>
<td>6%</td>
</tr>
<tr>
<td>Austria</td>
<td>6%</td>
</tr>
<tr>
<td>Greece</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

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

No. of respondents: 750 (total sample of respondents per country)
SNAPSHOT: POLISH TRAVEL PLANS

Travel horizon: October 2023-March 2024

No. of respondents: 500

TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>INTENTION TO TRAVEL</th>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>73%</td>
<td>85%</td>
</tr>
<tr>
<td>Neutral</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>19%</td>
<td>11%</td>
</tr>
</tbody>
</table>

TRAVEL PLANNING

WHERE TO?

- Neighbouring Country: 26% (up 6%)
- Non-Neighbouring Country: 26% (down 6%)
- Within My Country: 31% (down 7%)
- Outside Europe: 10% (up 7%)

TRAVELLING WITH?

- 35% with family
- 9%* with partner
- 13% solo

INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 15% (up 4%)
- 4-6 nights: 40% (down 7%)
- 7-9 nights: 27% (up 9%)
- 10-12 nights: 9% (up 4%)
- Over 12 nights: 4%* (down 6%)

- Up to 500€: 18% (down 4%)
- 501-1.000€: 23% (up 6%)
- 1.001-1.500€: 16% (down 4%)
- 1.501-2.000€: 18% (down 6%)
- 2.001-2.500€: 12% (up 8%)
- 2.501-3.000€: 6% (down 4%)
- 3.001€+: 7% (up 7%)

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

TOP 3 TYPES OF TRIPS

- City Break: 20%
- Culture & Heritage: 16%
- Coast & Sea: 11%

TOP 5 EUROPEAN DESTINATIONS**

- Italy: 8%
- Czech Republic: 7%
- Germany: 6% (down 4%)
- Greece: 6%
- Spain: 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: SPANISH TRAVEL PLANS
Travel horizon: October 2023-March 2024

### TRAVEL SENTIMENT

- **Intention to Travel**
  - Sept '23: 75% Likely/Very Likely, 14% Neutral, 11% Unlikely/Very Unlikely
  - Sept '22: 75% Likely/Very Likely, 13% Neutral, 13% Unlikely/Very Unlikely

### TRAVEL PLANNING

- **Where to?**
  - Neighbouring Country: 35%
  - Non-Neighbouring Country: 22%
  - Within my Country: 33%
  - Outside Europe: 7%

- **Travelling with?**
  - 43% with partner
  - 28% with family
  - 13% solo

- **Popular travel periods**
  - October-November 2023: 21%
  - December '23-January '24: 49%
  - February-March 2024: 15%

### TRAVEL READINESS

- Destination not chosen: 21%
- Trip fully booked: 16%
- Trip partially booked: 48%
- Destination chosen but trip not booked yet: 15%

### PREFERRED TYPES OF TRIPS & DESTINATIONS

- **TOP 3 TYPES OF TRIPS**
  - City Break: 39%
  - Culture & Heritage: 20%
  - Nature & Outdoors: 12%

- **TOP 5 EUROPEAN DESTINATIONS**
  - France: 15%
  - Italy: 11%
  - Germany: 9%
  - Portugal: 6%
  - UK: 6%

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

- **INTENDED LENGTH OF STAY AND BUDGET**
  - Up to 3 nights: 7%
  - 4-6 nights: 14%
  - 7-9 nights: 32%
  - 10-12 nights: 23%
  - Over 12 nights: 15%

* 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: October 2023-March 2024

### TRAVEL SENTIMENT

<table>
<thead>
<tr>
<th>Intention to Travel</th>
<th>Sept '23</th>
<th>Sept '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>63%</td>
<td>69%</td>
</tr>
<tr>
<td>Neutral</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>22%</td>
<td>14%</td>
</tr>
</tbody>
</table>

### TRAVEL PLANNING

#### WHERE TO?

- Neighbouring Country: 35% (up 8%)
- Non-neighbouring Country: 25%
- Within My Country: 18%
- Outside Europe: 14%

#### TRAVELLING WITH?

- 32% with family (down 10%)
- 26% with partner
- 16% solo

### INTENTION TO TRAVEL

Sept 22
- Likely/Very Likely: 69%
- Neutral: 17%
- Unlikely/Very Unlikely: 14%

### TRAVEL READINESS

- Destination not chosen: 23%
- Trip fully booked: 5%
- Trip partially booked: 28%
- Destination chosen but trip not booked yet: 28%

### POPULAR TRAVEL PERIODS

- October-November '23: 35%
- December '22-January '23: 29%
- February-March '24: 20%

### INTENDED LENGTH OF STAY AND BUDGET

- Up to 3 nights: 25%
- 4-6 nights: 35%
- 7-9 nights: 20%
- 10-12 nights: 10%
- Over 12 nights: 10%

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

- Up to 500€: 14%
- 501-1,000€: 22%
- 1,001-1,500€: 18%
- 1,501-2,000€: 15%
- 2,001-2,500€: 14%
- 2,501-3,000€: 8%
- Over 3,000€: 9%

### PREFERRED TYPES OF TRIPS

- Sun & Beach: 15%
- Coast & Sea: 15%
- City Break: 13%

### TOP 5 EUROPEAN DESTINATIONS

- Italy: 11%
- Germany: 8% (up 6%)
- France: 6% (down 6%)
- Austria: 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: 493 (total sample of respondents per country)
PLANNING THE DETAILS
36% of Europeans plan to travel once by March 2024 (-5% vs a year ago); taking three or more trips is up by 5% - mainly among Europeans travelling solo or with their friends.

**Sept '23 survey**

- **3 trips**: 12.0%
- **4 trips**: 4.9%
- **5+ trips**: 2.6%
- **None**: 7.3%
- **Don’t know yet**: 21.0%
- **2 trips**: 4.1%
- **1 trip**: 36.3%
- **0 trips**: 5%

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

- **With my partner**
  - 3+ trips: 7%
  - 2 trips: 6%
  - 1 trip: 5%
  - None: 4%
  - 21.0% of travellers

- **With my family**
  - 3+ trips: 7%
  - 2 trips: 6%
  - 1 trip: 5%
  - None: 4%
  - 30.0% of travellers

- **With friends**
  - 3+ trips: 7%
  - 2 trips: 6%
  - 1 trip: 5%
  - None: 4%
  - 13% of travellers

- **By myself**
  - 3+ trips: 7%
  - 2 trips: 6%
  - 1 trip: 5%
  - None: 4%
  - 13% of travellers

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

**Number of respondents**: 4,052

Q8. How many trips do you plan to take in the next 6 months, within Europe?
Preferred modes of transport for respondents most likely to travel in the next six months

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

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

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

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

Interest in train and bus travel (17%) increases; these transport options serve as a green alternative to driving, which drops by 7% compared to a year ago
The anticipated duration of holidays remains the same while spending increases: more travellers are budgeting over 1,500 euros per trip, while budgets of up to 1,000 euros are on the decline.

### Intended length of stay (nights)

- **Up to 3 nights**: 23% (Sept '22) vs 21% (Sept '23)
- **4-6 nights**: 40% (Sept '22) vs 39% (Sept '23)
- **7-9 nights**: 24% (Sept '22) vs 23% (Sept '23)
- **10-12 nights**: 8% (Sept '22) vs 9% (Sept '23)
- **Over 12 nights**: 6% (Sept '22) vs 8% (Sept '23)

### Planned budget

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

- **Up to 500 euros**: 21% (Sept '22) vs 17% (Sept '23)
- **501-1,000 euros**: 4%* (Sept '22) vs 5%* (Sept '23)
- **1,001-1,500 euros**: 32% (Sept '22) vs 27% (Sept '23)
- **1,501-2,000 euros**: 20% (Sept '22) vs 21% (Sept '23)
- **2,001-2,500 euros**: 13% (Sept '22) vs 14% (Sept '23)
- **2,501-3,000 euros**: 8% (Sept '22) vs 9% (Sept '23)
- **Over 3,000 euros**: 4% (Sept '22) vs 6% (Sept '23)
- **Over 5000 euros**: 3% (Sept '22) vs 5% (Sept '23)

### TRAVELLERS IN ORGANISED GROUPS AND FOR BUSINESS PURPOSES SPEND MORE

39% of Europeans travelling with an organised group or with a business colleague plan to spend over 2,000 euros, compared to only 22% among Europeans travelling with their family.

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)?
**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>39%</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>501 - 1,000 euros</td>
<td>34%</td>
<td>34%</td>
<td>23%</td>
</tr>
<tr>
<td>1,001 - 1,500 euros</td>
<td>12%</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>1,501 - 2,000 euros</td>
<td>6%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>2,001 - 2,500 euros</td>
<td>3%</td>
<td>7%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Compared to Culture & Heritage travellers, City Break travellers are more likely to take a micro trip of up to 3 nights (36% vs. 21%) and to spend up to 1,000 euros (56% vs. 42%).

Furthermore, 50% of Europeans with a passion for city tourism will spend up to 1,000 euros, compared to 44% among food lovers and 38% among explorers of cultural identity and roots.

No. of respondents: 4,165
The mature travellers are the ones envisaging longer stays

Intended length of stay (nights)

- **Over 12 nights**: 30%
- **10-12 nights**: 35%
- **7-9 nights**: 37%
- **4-6 nights**: 38%
- **Up to 3 nights**: 31%

---

Europeans aged 25-54 are more likely to spend over 1,500 euros on their trip

Envisaged budget

- **Over 3,000 euros**: 30%
- **2,501 - 3,000 euros**: 35%
- **2,001 - 2,500 euros**: 37%
- **1,501 - 2,000 euros**: 38%
- **1,001 - 1,500 euros**: 31%
- **501 - 1,000 euros**: 8,8%
- **Up to 500 euros**: 13,9%

---

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)?
53% of Europeans prefer to stay in a hotel, and 15% opt for short-term rentals - similar to a year ago

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

- Hotel chain or resort: 53%
- Independent hotel/resort: 25.0%
- Friends and/or family: 15.4%
- Other paid serviced accommodation (bed and breakfast, etc.): 11.1%
- Hostel/motel: 8.6%
- Short-term rental via online platform: 6.1%
- Other/Unknown: 4.6%
- Other: 1.3%

Sept '23 survey
- Hotel chain or resort: 27.9%
- Independent hotel/resort: 25.0%
- Friends and/or family: 15.4%
- Other paid serviced accommodation (bed and breakfast, etc.): 11.1%
- Hostel/motel: 8.6%
- Short-term rental via online platform: 6.1%
- Other: 1.3%

May '23 survey
- Hotel chain or resort: 26.2%
- Independent hotel/resort: 23.3%
- Friends and/or family: 17.2%
- Other paid serviced accommodation (bed and breakfast, etc.): 10.3%
- Hostel/motel: 9.4%
- Short-term rental via online platform: 5.9%
- Other: 6.4%

Mar '23 survey
- Hotel chain or resort: 27.8%
- Independent hotel/resort: 24.1%
- Friends and/or family: 15.3%
- Other paid serviced accommodation (bed and breakfast, etc.): 10.8%
- Hostel/motel: 8.9%
- Short-term rental via online platform: 5.7%
- Other: 5.9%

Dec '22 survey
- Hotel chain or resort: 28.8%
- Independent hotel/resort: 26.2%
- Friends and/or family: 15.7%
- Other paid serviced accommodation (bed and breakfast, etc.): 11.1%
- Hostel/motel: 8.2%
- Short-term rental via online platform: 4.7%
- Other: 4.2%

Sept '22 survey
- Hotel chain or resort: 28.7%
- Independent hotel/resort: 26.7%
- Friends and/or family: 15.8%
- Other paid serviced accommodation (bed and breakfast, etc.): 11.5%
- Hostel/motel: 7.3%
- Short-term rental via online platform: 4.8%
- Other: 3.8%

Travellers staying in hotels are more likely to visit famous landmarks (39% vs 29%), experience the local culture (40% vs 31%), and learn about the destination’s culture and history (35% vs 28%), compared to non-hotel guests.

Q14. Which of the following types of accommodation would you most consider staying at during your next trip within Europe? *No statistically significant difference vs a year ago (Sept 2022)
45% of travellers have already partially or fully booked their next trip - same as last year and down by 11% compared to the pre-summer booking rush.

Planning status for the next trip:

- I have not yet chosen where I will travel next: 45%
- I have chosen where I want to go but not yet booked/arranged my trip: 38.2%
- I have booked/arranged the accommodation for my next trip: 32.5%
- I have booked/arranged the transportation for my next trip: 28.5%
- I have booked/arranged all travel and accommodation components for my next trip: 14.7%

The type of trip may determine the time of booking:
Those who choose cruises (56%), beach breaks (44%) and wellness trips (44%) are more likely to book ahead, compared to holiday makers who prefer culture and heritage (37%) or city breaks (38%).
Trip bookings for December - January (+8%) and February-March (+13%) surge, perhaps due to increased interest in early-bird deals.

**Booking status and timing of next trip**
- In 1-2 months: 29.4%
- In 3-4 months: 25.1%
- In 5-6 months: 24.4%

**Booking status and travel destination**
- In my country: 36.8%
- A neighbouring country: 39.4%
- A non-neighbouring European country: 38.9%
- Outside Europe: 30.7%

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

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

<table>
<thead>
<tr>
<th>Booking status and travel destination</th>
<th>percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>In my country</td>
<td>36.8%</td>
</tr>
<tr>
<td>A neighbouring country</td>
<td>39.4%</td>
</tr>
<tr>
<td>A non-neighbouring European country</td>
<td>38.9%</td>
</tr>
<tr>
<td>Outside Europe</td>
<td>30.7%</td>
</tr>
</tbody>
</table>

No. of respondents: 4,052
Pleasant weather, good deals and friendly locals are still top criteria for Europeans choosing a travel destination

Top 8 criteria for choosing the next travel destination

- Pleasant weather conditions: 18.7%
- Bargains and attractive deals: 17.1%
- Friendly and welcoming locals: 12.2%
- Destination is not crowded: 9.9%
- Direct transport routes: 9.3%
- Preserved natural and cultural heritage: 6.8%
- Health & safety protocols: 6.2%
- Fully lifted travel restrictions: 5.9%

The importance of pleasant weather increases with age: 32% of respondents aged over 54 take weather into consideration when deciding on their next holiday destination vs only 10% among travellers aged 18-24.

Q5. What criteria will play the most important role in choosing your next holiday destination?
WHAT DO EUROPEAN TRAVELLERS WORRY ABOUT?

Inflation and personal finances continue to top Europeans’ concerns, while concerns regarding extreme weather events spike by 7% after a volatile summer across Europe.

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

- **22.3%** Rise in the overall cost of my trip due to inflation
- **14.2%** Extreme weather events (↑ 7%**)
- **8.7%** Too many visitors in the destinations I want to visit
- **5.7%** Sudden quarantine measures or changes in travel restrictions during my trip (↓ 3%*)
- **15.8%** Economic situation and personal finances
- **11.0%** The ongoing conflict between Russia and Ukraine
- **6.5%** Booking and cancellation policies [refunds, etc.]
- **5.5%** The environmental footprint of my travel

Top 4 markets concerned with rising travel costs:
- Poland: 27%
- Spain: 24%
- Italy: 24%
- France: 24%

Top 4 markets concerned with personal finances:
- Poland: 17%
- UK: 17%
- Spain: 16%
- Belgium: 16%

* Statistically significant difference vs a year ago (Sept 2022)
** Statistically significant difference vs the pre-summer period (May 2023)
The effect of the ongoing war in Ukraine on the travel plans of Europeans increases (+8%), and a considerable 13% have avoided countries neighbouring the conflict zone (+3%).

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

- I had not planned any overnight trips in the next six 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:

- Poland: 46.4% (15%)
- Italy: 44.5% (19%)
- Germany: 40.2% (15%)
- Switzerland: 39.8% (12%)
- Austria: 38.1% (13%)

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

* Statistically significant difference vs a year ago (Sept 2022)
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?

- **22%** Off-season journeys
- **13%** More affordable destinations
- **13%** Early booking of flights
- **13%** Early booking of activities
- **12%** Low-cost flights
- **11%** Pack light
- **9%** Last-minute flight deals

*Statistically significant difference vs May 2023*
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
- 11% Less activities with admission fees
- 9% Less bars & nightclubs

No. of respondents: 4,052
Q22. Thinking about the next six months, do you foresee any changes in your budget for each of the following categories?

<table>
<thead>
<tr>
<th>Category</th>
<th>Dec '22</th>
<th>Mar '23</th>
<th>Apr '23</th>
<th>May '23</th>
<th>Jun '23</th>
<th>Jul '23</th>
<th>Aug '23</th>
<th>Sep '23</th>
<th>Oct '23</th>
<th>Nov '23</th>
<th>Dec '23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travelling (domestic or international)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>19%</td>
<td>20%</td>
<td>17%</td>
<td>3%</td>
<td>23%</td>
<td>22%</td>
<td>22%</td>
<td>19%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Food &amp; home supplies (groceries)</td>
<td>59%</td>
<td>50%</td>
<td>48%</td>
<td>54%</td>
<td>6%</td>
<td>3%</td>
<td>21%</td>
<td>19%</td>
<td>19%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>Energy &amp; fuel (for home or vehicle)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports &amp; personal care (e.g., gym subscription, hairdressers)</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
<td>23%</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Leisure activities (e.g., theatre, concerts, restaurants, bars, etc.)</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Shopping (clothes, electronics &amp; other retail goods)</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

27% of Europeans concerned by the economic situation will spend much less on travelling, and 60% of those concerned by travel price inflation will maintain their past travel budget.

Anticipated changes in spending, in the coming six months

- I will spend much less
- I will spend about the same
- I will spend much more

* Statistically significant difference vs the pre-summer period (May 2023)

No. of respondents: 5,993
METHODOLOGICAL ANNEX
### METHODOLOGICAL DETAILS

#### 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 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 / Wave 17: 11 -26 September 2023; sample = 5,993
- 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 17 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>88</td>
<td>96</td>
<td>92</td>
<td>56</td>
<td>79</td>
<td>81</td>
<td>87</td>
<td>781</td>
</tr>
<tr>
<td>25 - 34</td>
<td>136</td>
<td>112</td>
<td>73</td>
<td>143</td>
<td>128</td>
<td>152</td>
<td>106</td>
<td>129</td>
<td>133</td>
<td>139</td>
<td>1,251</td>
</tr>
<tr>
<td>35 - 44</td>
<td>126</td>
<td>134</td>
<td>103</td>
<td>115</td>
<td>140</td>
<td>150</td>
<td>120</td>
<td>82</td>
<td>105</td>
<td>93</td>
<td>1,168</td>
</tr>
<tr>
<td>45 - 54</td>
<td>138</td>
<td>168</td>
<td>105</td>
<td>76</td>
<td>146</td>
<td>168</td>
<td>92</td>
<td>111</td>
<td>103</td>
<td>84</td>
<td>1,191</td>
</tr>
<tr>
<td>≥55</td>
<td>262</td>
<td>266</td>
<td>175</td>
<td>78</td>
<td>240</td>
<td>188</td>
<td>126</td>
<td>99</td>
<td>71</td>
<td>97</td>
<td>1,602</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>500</td>
<td>493</td>
<td>500</td>
<td>5,993</td>
</tr>
</tbody>
</table>