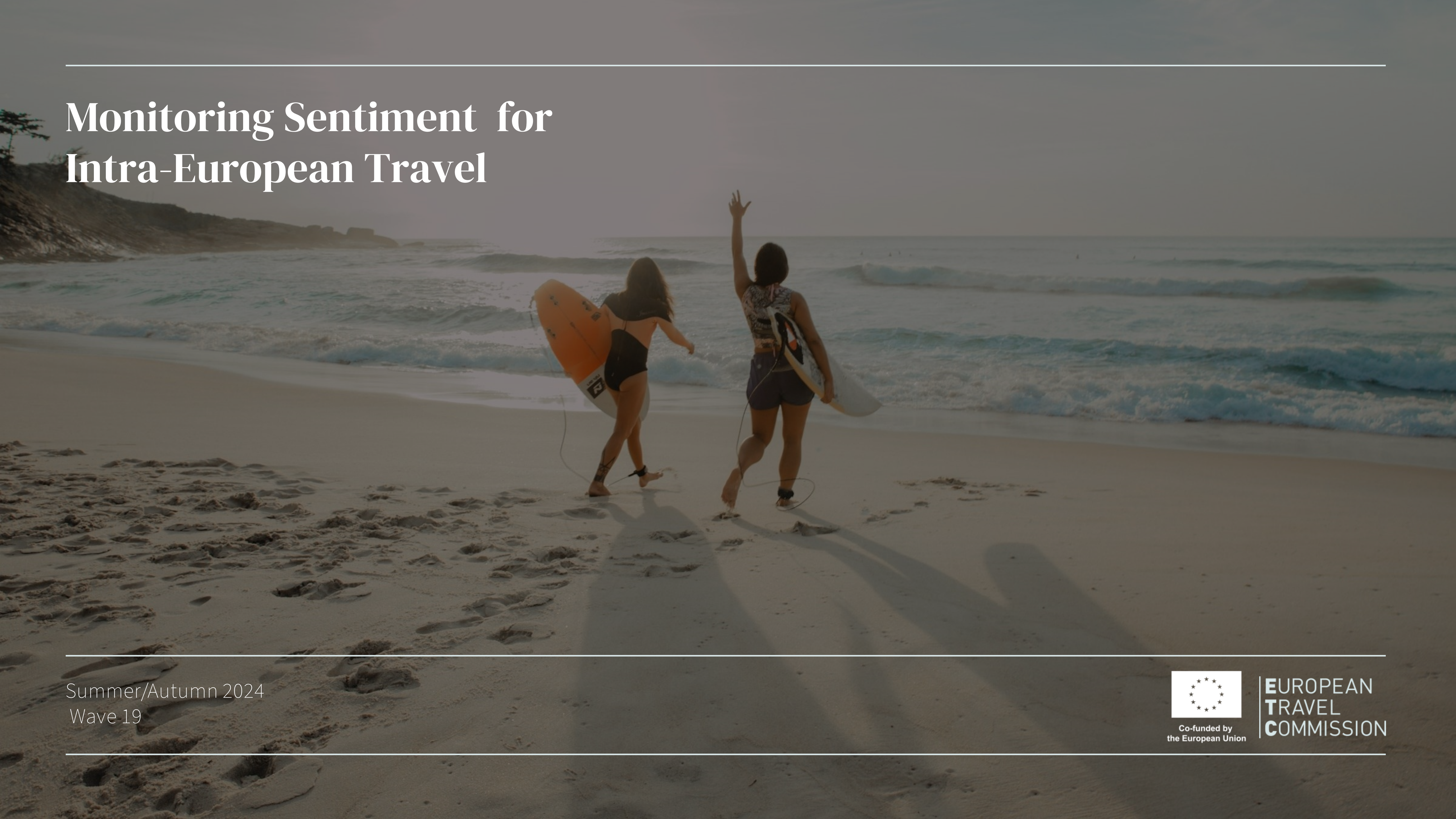
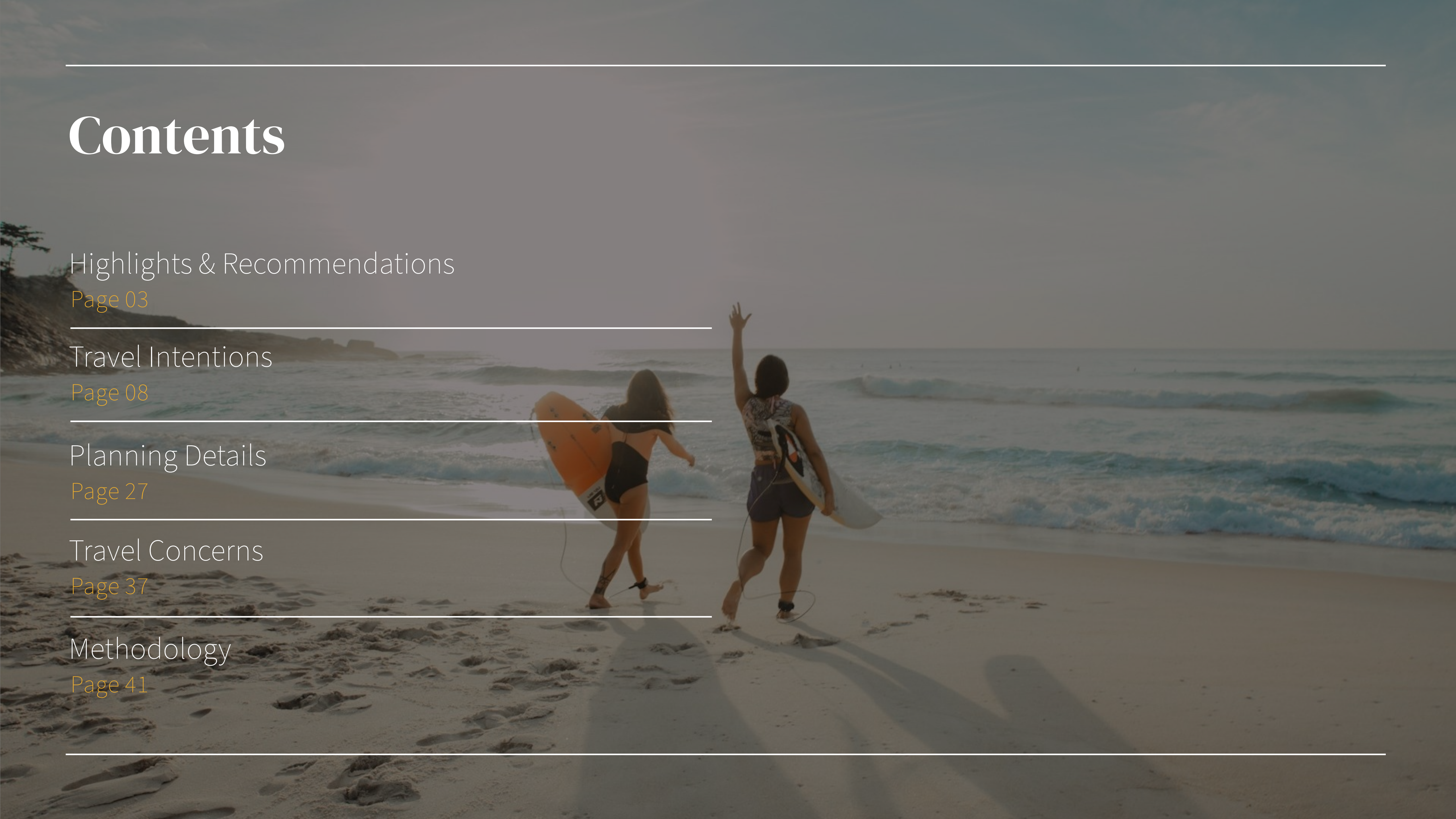


Monitoring Sentiment for Intra-European Travel

Summer/Autumn 2024
Wave 19

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION



Contents

Research highlights

WAVE 19

This report monitors sentiment and short-term plans for domestic and intra-European travel and is the 19th wave of a market research project which began in September 2020. The findings are drawn from data collected in May and early June 2024 from individuals across 10 key European markets for the June-November 2024 travel period.

EUROPEAN
TRAVEL
COMMISSION

TRAVEL INTENTIONS

- European tourism is set to reach new heights, with 76% of Europeans planning to travel between June and November 2024, up by 6% over last year. Leisure is the key motivation for 70%, while 14% will travel to visit friends/relatives, and 8% plan a business trip.
- Travel will peak with the heat of the summer - 45% of respondents intend to travel in June and July (+6% compared to last year), and an additional 39% will do so during August and September. Visiting another European country remains the most popular choice for 58% of travellers, while 28% will travel domestically.
- As in previous summers, Sun & Beach trips have the lead (19%), followed by Culture & Heritage (17%) and Nature & Outdoors (14%). Europeans' most desired travel experiences include admiring natural landscapes, savouring local gastronomy and indulging in local cultures.

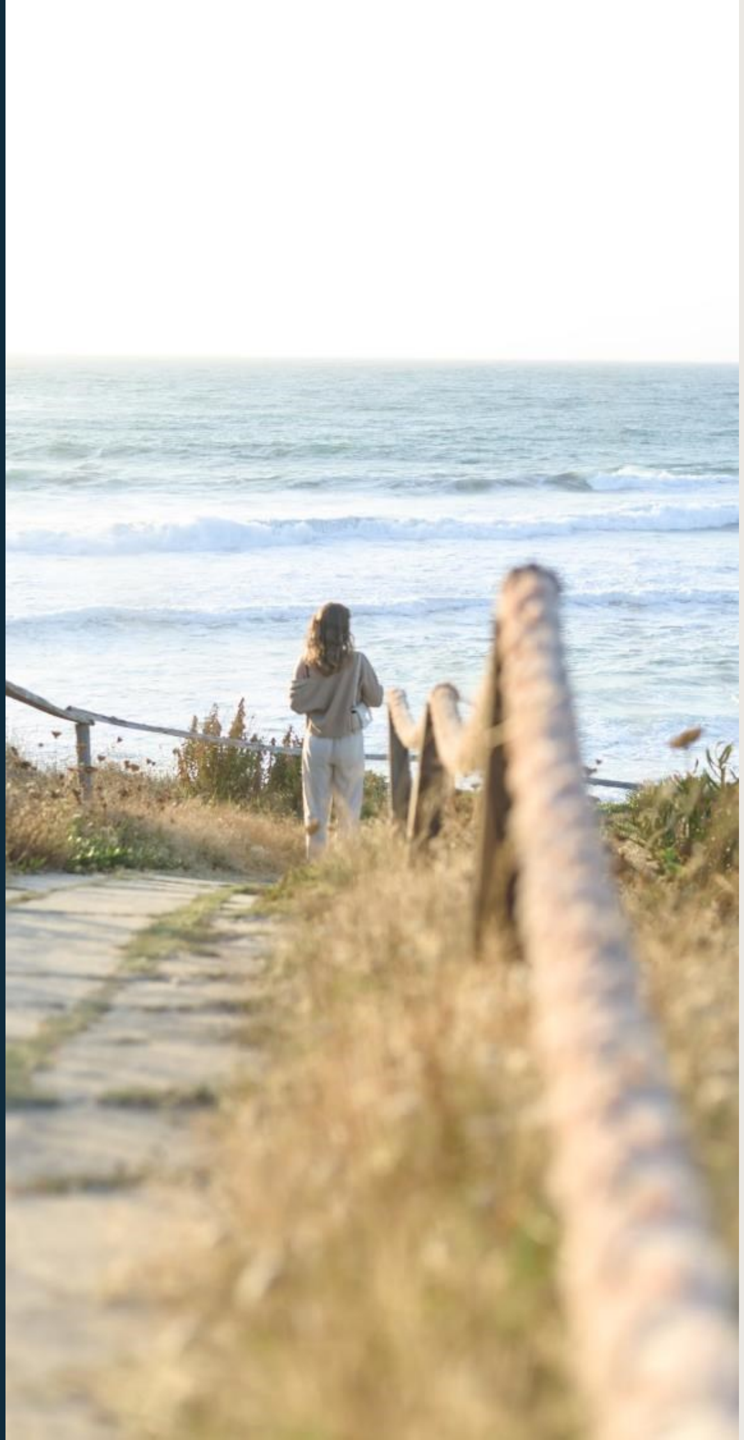
TRIP PLANNING

- Nearly equal shares of travellers plan to take a single trip (36%) and two trips (33%) in the upcoming months, with the former increasing by 6% compared to last year, possibly due to economic concerns.
- A larger share of Europeans (56%) have already booked their upcoming trip, gearing up towards travelling high season.
- 54% of Europeans will fly to their next destination, up by 5% over a year ago. Travel by train remains stable at 11%.
- As for accommodation, hotels remain Europeans' first choice (53%, +3% compared to last year), followed by short-term rentals (17%).

Research highlights

WAVE 19

EUROPEAN
TRAVEL
COMMISSION



TRIP PLANNING

- Taking advantage of the 'Grandes Vacances', half of travellers are planning trips that extend for at least one week. This trend is particularly prominent among Europeans aged 45 and above, who show a notable preference (52%) for extended vacations lasting beyond seven days.
- Despite price inflation, Europeans' travel budgets and intended length of stay for the coming months remain unchanged.
- Europeans aged 25-34 are the most likely to splurge on their upcoming trip, with 46% planning on spending over 1,500 euros per trip.

TRAVEL CONCERNS

- In times of geopolitical tension, climate crisis, and high travel costs, safety (16%), pleasant weather (13%), and bargains (11%) are Europeans' leading criteria for choosing a destination in the coming six months.
- Consequently, price inflation (21%) and personal finances (16%) are travellers' leading concerns, followed by geo-political tensions resulting from the war in Ukraine (11%) and the Middle East (10%).
- Additionally, some Europeans have reported changing their travel habits due to the evolving climate. A third of them now shared to be avoiding destinations where temperatures might reach extreme levels, opting instead for locations with more stable weather conditions. Travellers above the age of 55 are particularly determined to avoid the heat.

WAVE 19

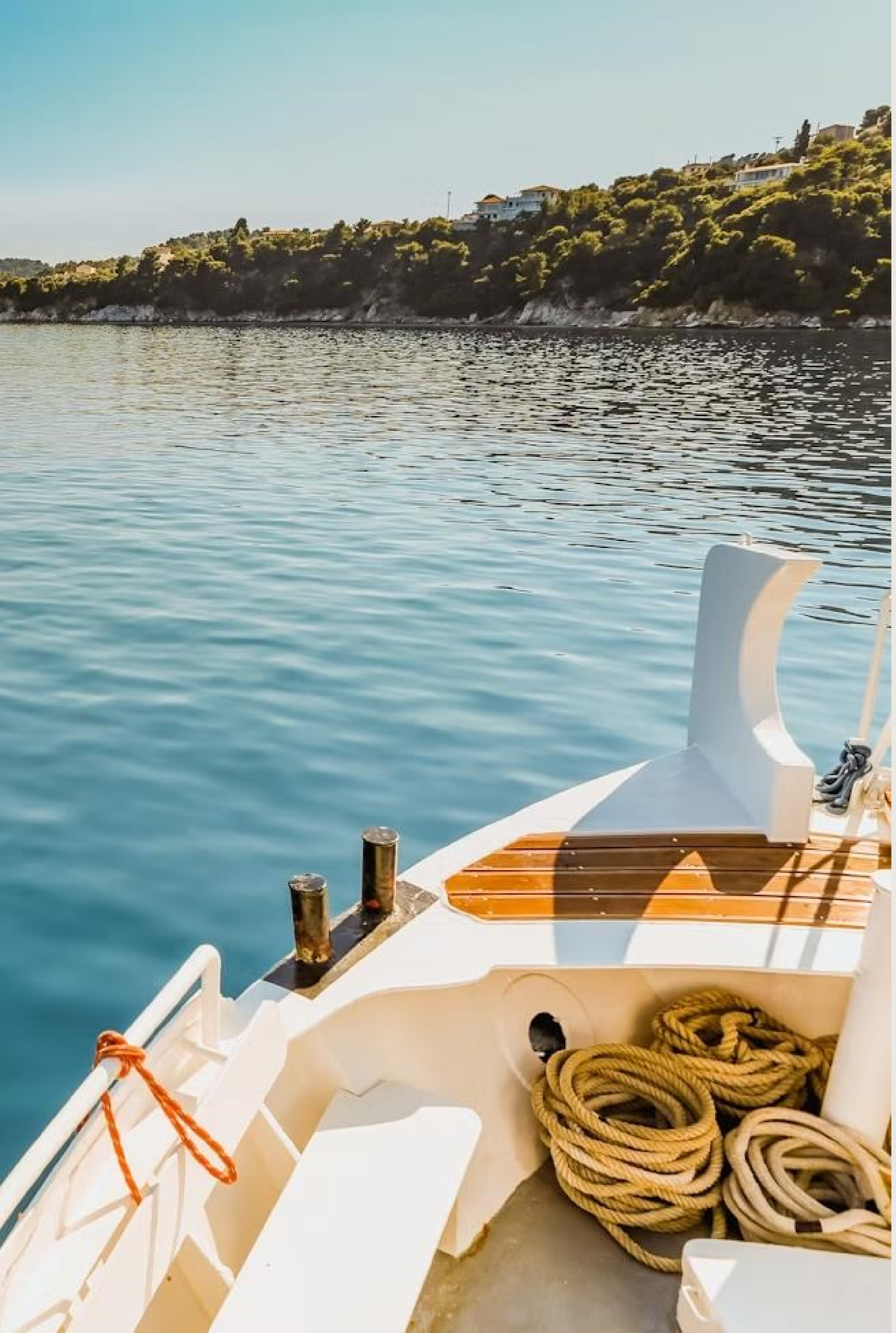
Recommendations for destinations

- As European travel demand peaks, a growing number of destinations are called upon to prevent overtourism, by implementing visitors' management tools. These include limiting further expansion of tourism infrastructure, capping visitor numbers, applying visitors' taxes, and directing tourism development to second tier destinations.
- Europeans' growing concern about extreme temperatures is a prime opportunity for Coast & Sea getaways, which could market themselves as a pleasant and less crowded alternative to hot and jam-packed Sun & Beach destinations.
- Europeans' demand for air travel soars – especially for Culture & Heritage (61%) and Sun & Beach (59%) trips. To encourage these travellers to take a train, destinations should act to make train travel more affordable, enhance the supply of direct trains between key demand areas and popular destinations, and offer rewards to travellers who choose to travel by train.
- To aid travellers with an aversion to extreme weather, destinations should mitigate the impact of such events by establishing cooling areas in tourist spots, increasing the availability of shaded areas, and investing in heat-resilient infrastructure (e.g., heat-reflective pavements).

WAVE 19

Recommendations for businesses

- 29% of Europeans plan to immerse themselves in the local lifestyle or learn new things about their next destinations. To meet this interest, local businesses could provide walking tours, culinary experiences, workshops, and visits to local homes—activities that would allow visitors to get an insider's perspective while promoting cross-cultural understanding and more respectful behaviours.
- To attract couples who prefer staying in hotels, these establishments could offer romantic packages, create activities specifically for couples, and emphasise privacy and intimacy.
- 38% of Cruise travellers and 32% of Sun & Beach travellers have already fully booked their trip, and travel agencies targeting these travellers should market well in advance. In contrast, 33% of Europeans planning a City Break and 32% of those taking a Culture & Heritage trip have not yet booked, and campaigns for these segments could be launched at a later stage.
- Responding to Europeans' economic concerns and the interest in destinations with lower costs of living, businesses in more affordable destinations should highlight both their attractive pricing and the overall low cost of travelling in their region. This is especially important when targeting households of average or below-average income.



WAVE 19

Reading the data

Data collection periods

Wave 15	1-7 March 2023
Wave 16	8 May- 4 June 2023
Wave 18	2-17 April 2024
Wave 19	25 May -7 June 2024

Analysed samples

- Total respondents: 5,955
- Respondents most likely to travel in the next six months: 4,508
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 4,560

Travel timings for Wave 19

The following time periods should be used as a reference when interpreting the desired travel period

In 1-2 months:	June-July 2024
In 3-4 months:	August-September 2024
In 5-6 months	October-November 2024

Significant changes

Changes are assessed with a 2.5% threshold for significance and marked with the following symbols:

Increase ▲ Decrease ▼

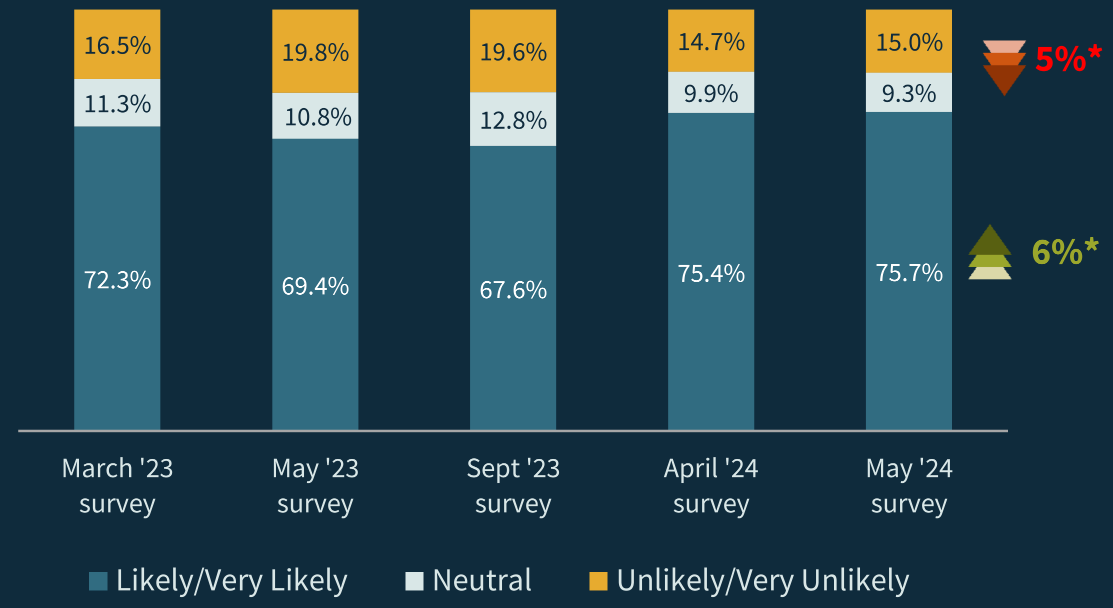
All data and insights refer to domestic and intra-European travel unless otherwise stated.

Travel intentions

01

76% of Europeans are eager to travel in the next six months, up 6% in a year

Intention to travel in the next six months



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

Top three markets most likely to travel in the next six months

SPAIN

81% 10%*

ITALY

81% 10%*

UK

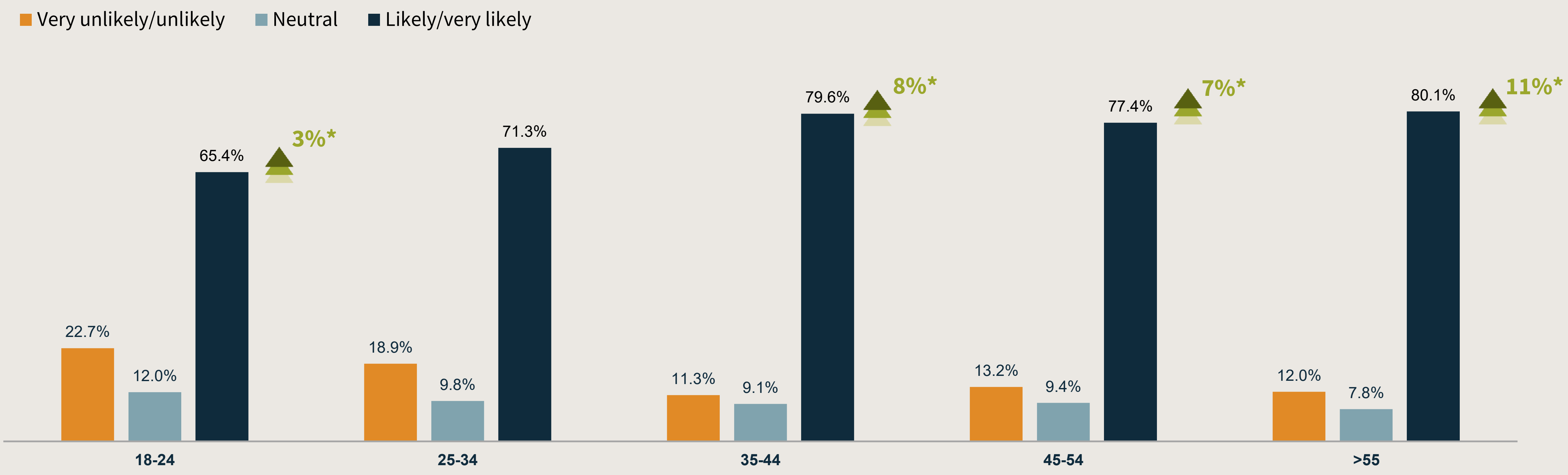
80% 6%*

* Statistically significant difference vs a year ago (May 2023)

No. of respondents: 5,955

Travel sentiment is stronger among Europeans over the age of 35, with an increase of 9% over a year ago

Intention to travel in the next six months by age group

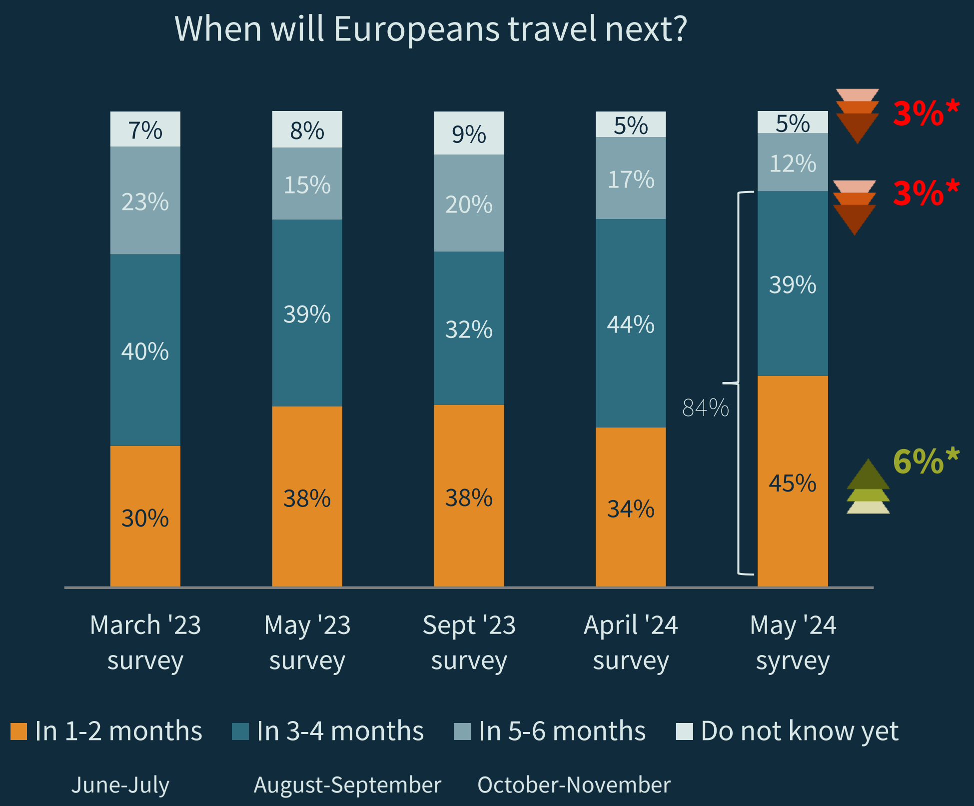


* Statistically significant difference vs a year ago (May 2023)

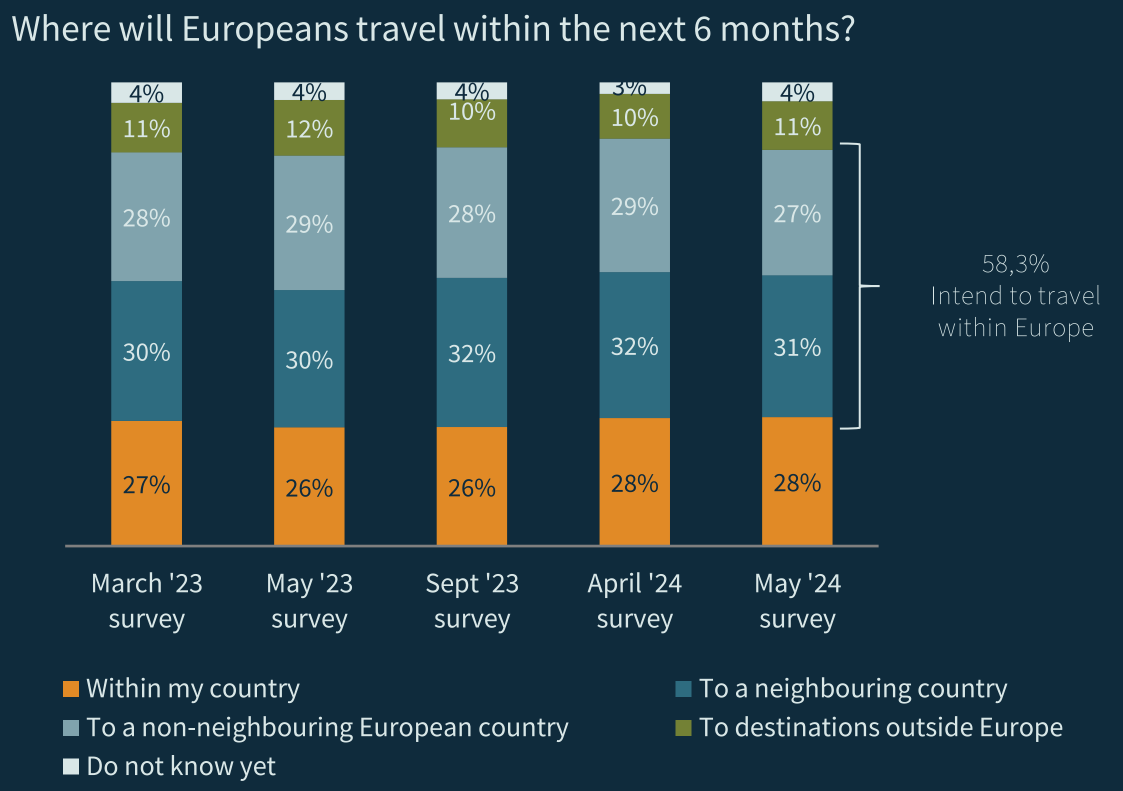
Q8. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

No. of respondents: 5,955

45% of Europeans are planning to travel between June-July, with more than half (58%) opting to visit other countries within Europe



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

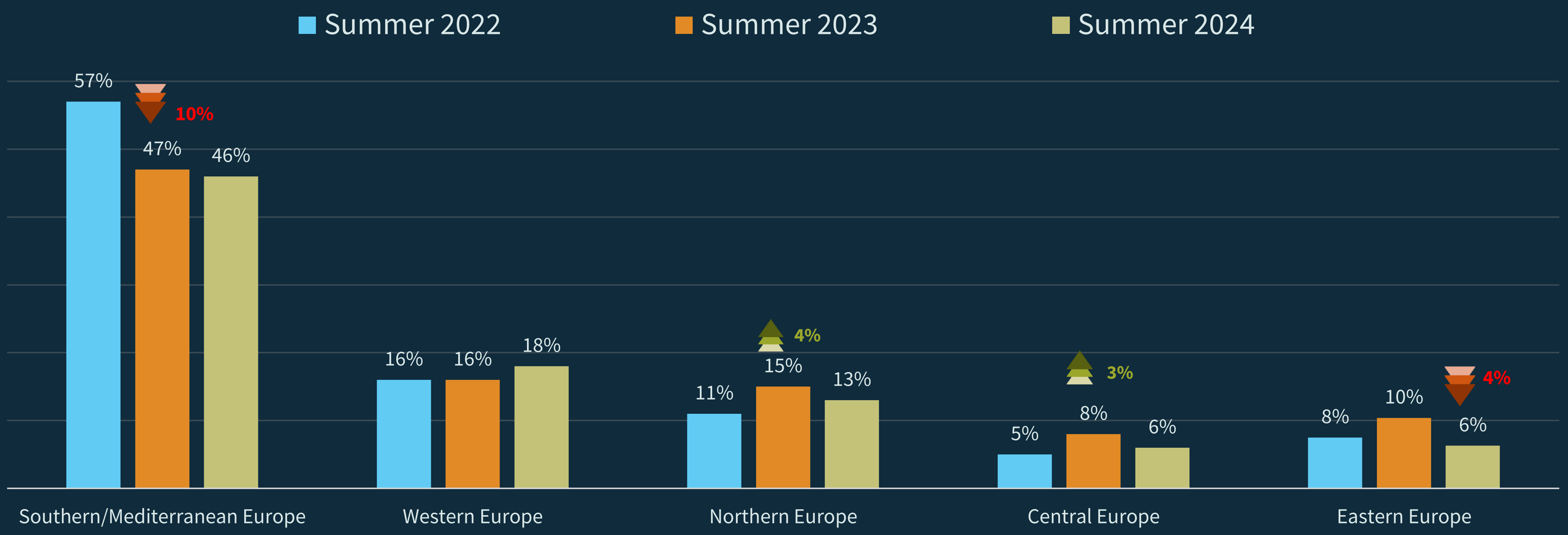


Q12. Where do you plan to travel in the next 6 months?

* Statistically significant difference vs a year ago (May 2023)

No. of respondents: 4,508

European regions favoured for travel in the summer



Statistically significant difference vs the previous year

Definitions of the regions can be seen in the Methodology

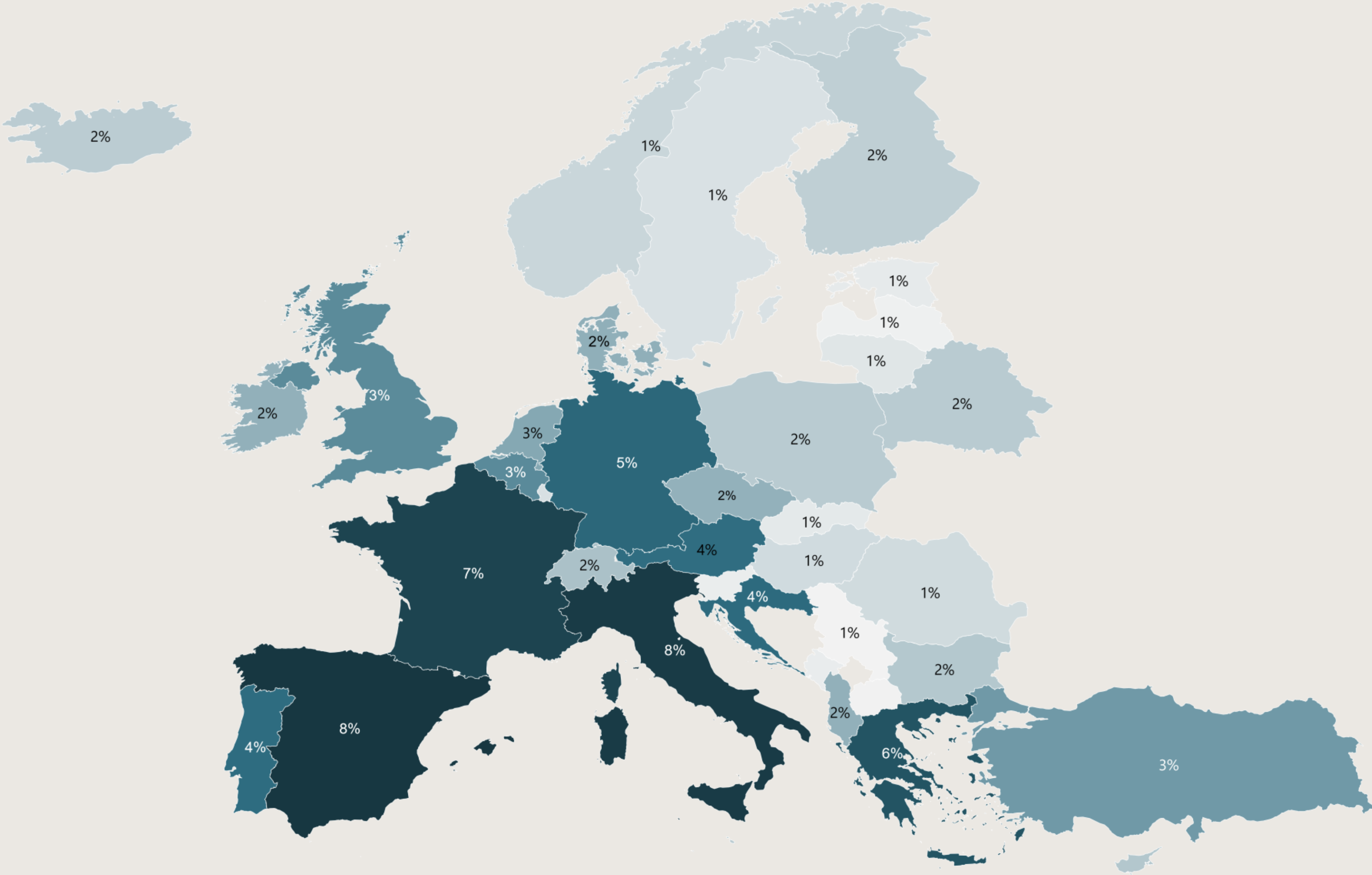
No. of respondents: 4,560

Preferred countries for the next intra-European trip

Horizon June –November '24

TOP 10 COUNTRIES

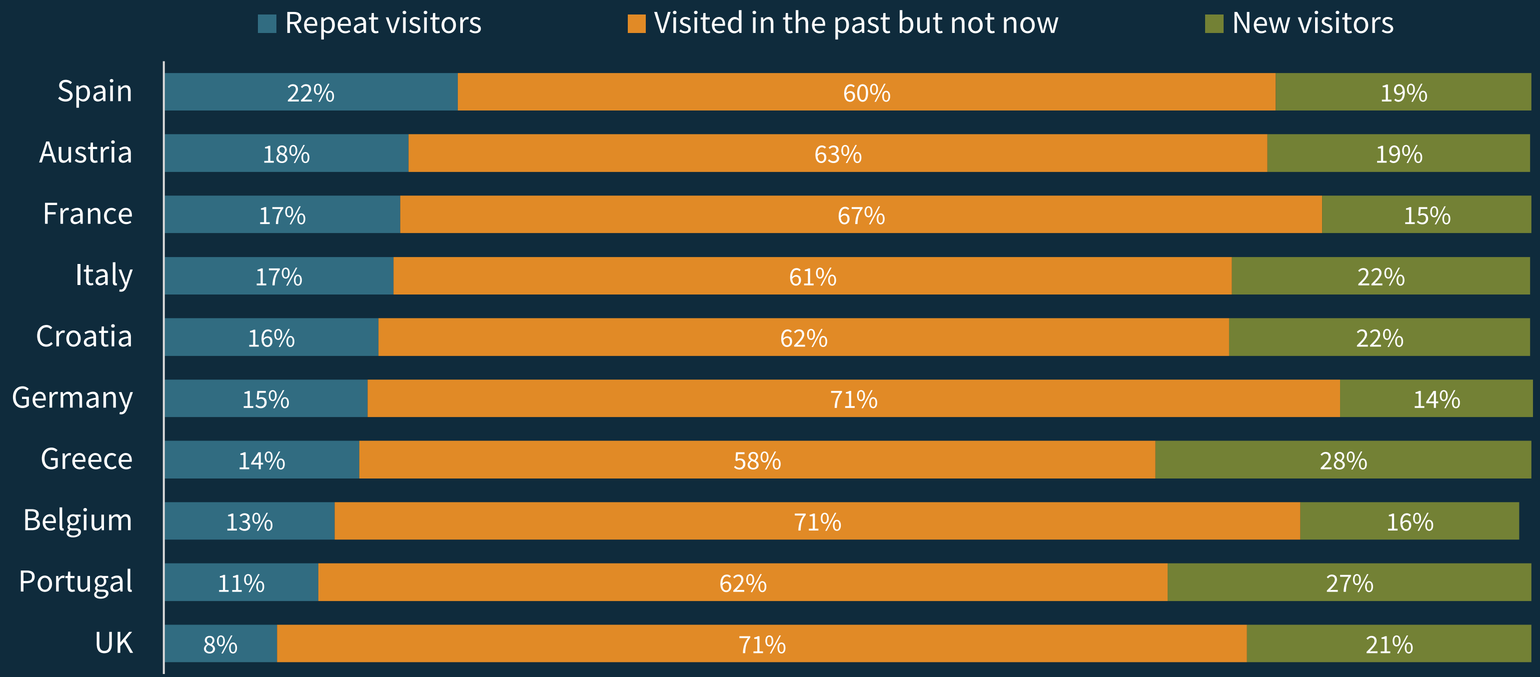
Spain	**7,8%**
Italy	**7,6%**
France	**7,0%**
Greece	**5,9%**
Germany	**4,6%**
Croatia	**4,3%**
Portugal	**4,2%**
Austria	**4,2%**
Belgium	**3,4%**
United Kingdom	**3,4%**



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

Spain and Austria lead in visitor loyalty, Greece and Portugal draw in fresh enthusiasts

Past and future visitors per destination (Top 10 most popular destinations)



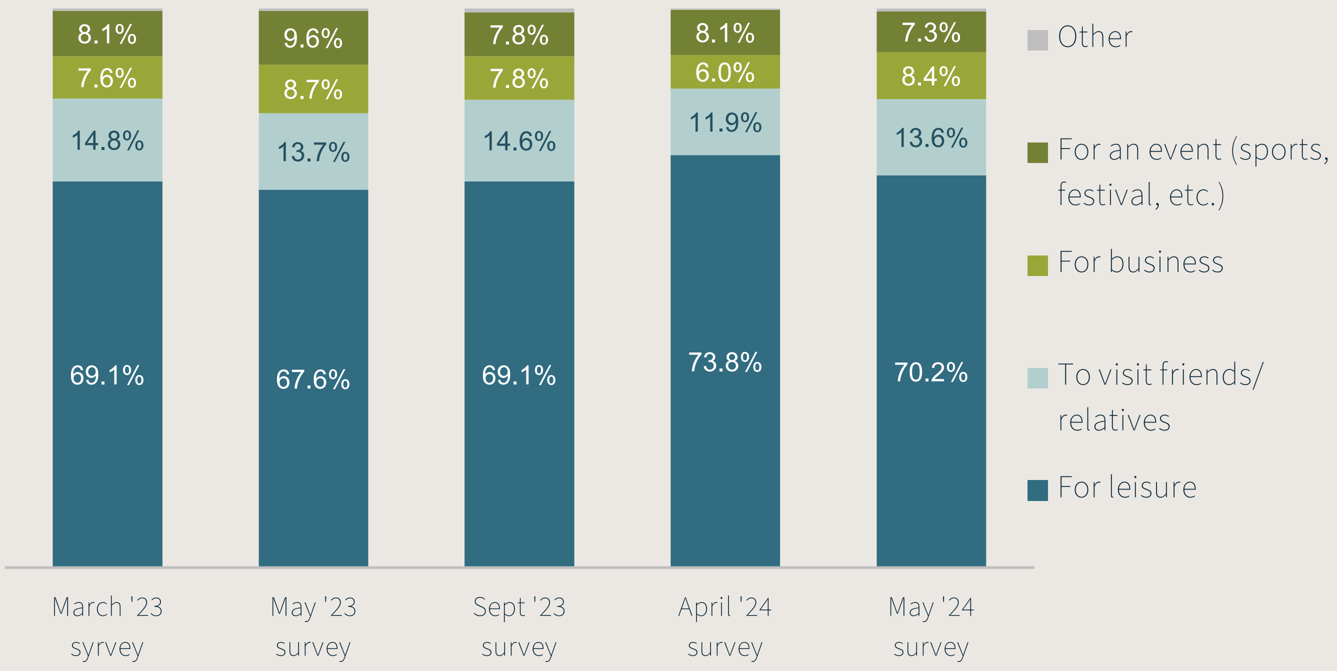
Q1. Which European countries have you visited in the past three years (2022-2023-24)?
Q13. To which country(ies) do you plan to travel next?

NOTE: The sample includes respondents with past experience or future intentions to visit the destinations. It excludes domestic travellers. Total No. of cases: 7,487

70% of Europeans plan leisure trips for the next 6 months

Interest in travelling for an event remains similar to a year ago, despite the upcoming Olympic Games, the EURO 2024 games and the Taylor Swift Eras Tour in Europe

Purpose of travel



Q10. For what reason are you most likely to travel within Europe next?

* Statistically significant difference vs a year ago (May 2023)

No. of respondents: 4,508

Top 3 markets to take a leisure trip

SPAIN

80%

ITALY

77%

FRANCE

74%

Top 3 markets to take a business trip

NETHERLANDS

16% 10%*

BELGIUM

10%

SWITZERLAND

10% 9%*

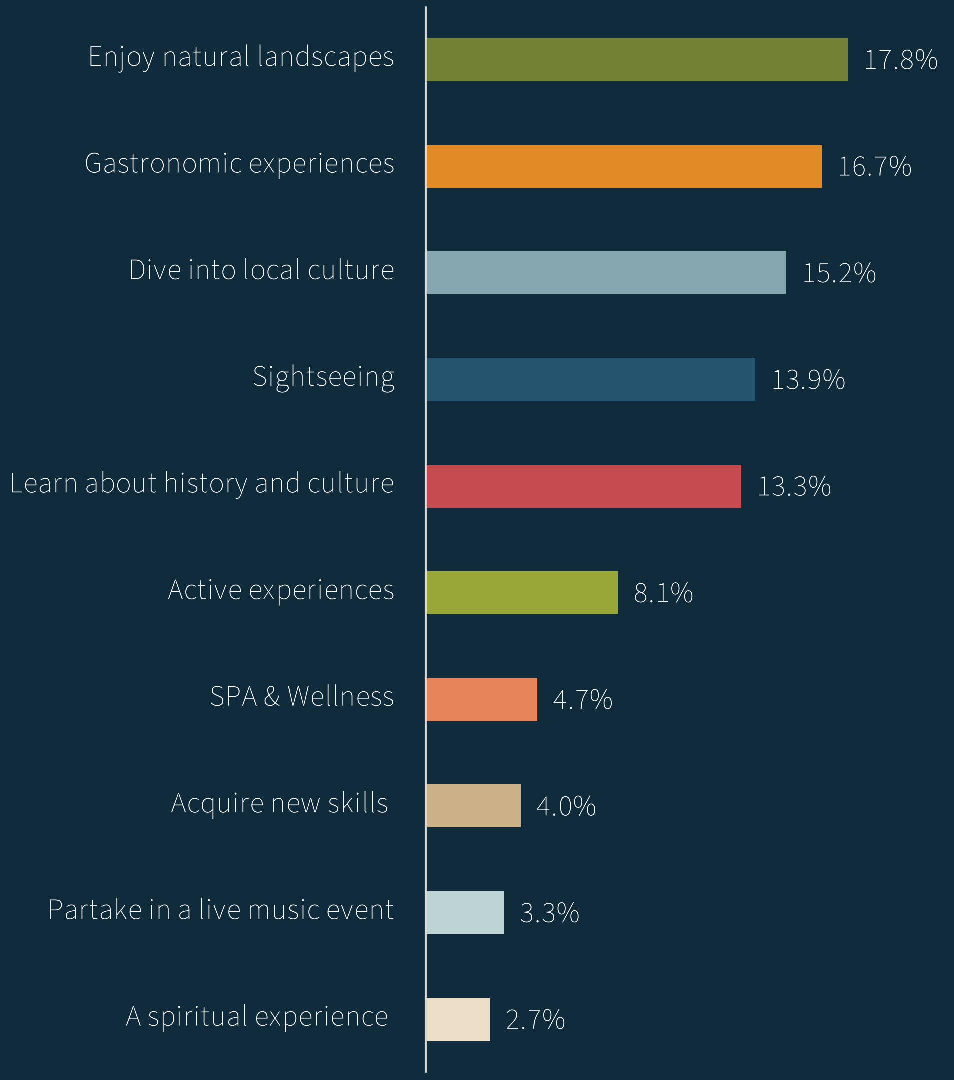
Results for business trip per country are indicative due to small sample bases

Sun & Beach trips are the undisputed king of summer travel

Europeans’ preference for enjoying nature, gastronomy and culture remains stable compared to summer 2023

Preferred type of leisure trip in the next six months

PREFERRED EXPERIENCES IN THE NEXT 6 MONTHS



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

No. of respondents: 4,508

Popular types of trips and experiences

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

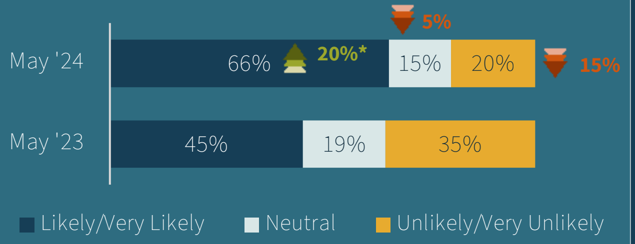
	Sun & Beach		Culture & Heritage		Nature & Outdoors		City Break	
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	27% >55	21% 35-44	38% >55	21% 25-34	37% >55	22% 45-54	29% >55	20% 25-34 & 35-44
MOST COMMON LENGTH OF STAY & BUDGET	34% 7-9 nights 27% 4-6 nights	25% 500-1000 € 24% 1001-1500 €	43% 4-6 nights 22% 7-9 nights	24% 500-1000 € 20% 1001-1500 €	38% 4-6 nights 26% 7-9 nights	30% 500-1000 € 21% 1001-1500 €	41% 4-6 nights 28% up to 3 nights	33% 500-1000 € 19% up to 500€
TOP EXPERIENCES TO TRY	18% Enjoy natural landscapes 18% Gastronomic experiences 15% Dive into local culture 13% Sightseeing		22% Learn about history 17% Dive into local culture 16% Sightseeing 14% Gastronomic experience		26% Enjoy natural landscapes 16% Gastronomic experiences 15% Dive into local culture 11% Learn about history		20% Sightseeing 17% Gastronomic experiences 16% Dive into local culture 16% Enjoy natural landscapes	
TOP DESTINATIONS	17% Spain 11% Greece 9% Italy 6% France		8% France 7% Italy 6% Austria 5% Spain		10% France 6% Italy 6% Austria 6% Germany		10% Italy 8% France 7% Germany 6% UK	

No. of respondents: 4,508

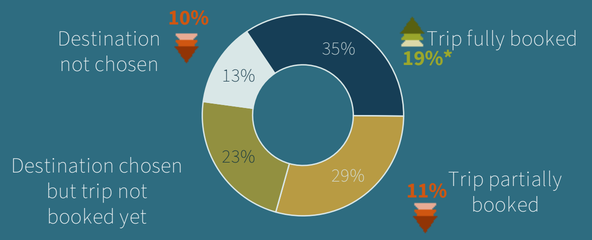
Austrians' travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL



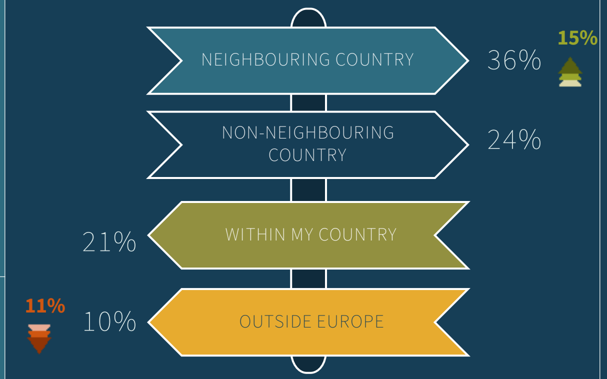
TRAVEL READINESS



POPULAR TRAVEL PERIODS

39%	June-July '24	13%*
32%	August-September '24	8%*
11%	October-November '24	12%

WHERE TO?



TRAVELLING WITH?

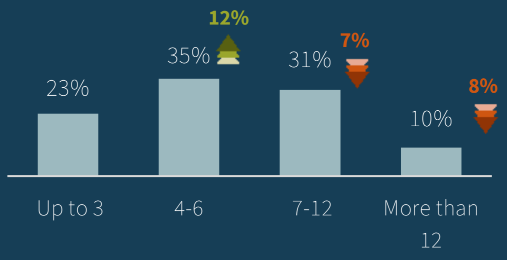
With family	With partner	Solo
32% (10%)	30% (15%)	15%

TOP 3 TYPES OF TRIPS

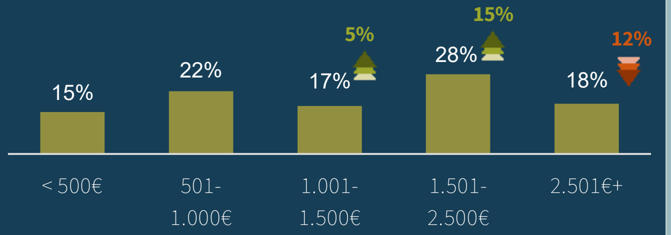
18%	Sun & Beach	6%
15%	Nature & Outdoors	5%
14%	Coast & Sea	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Italy	10% (5%)	10%
Croatia	7%	9%
Germany	6%	7%
Greece	5%	3%
Belgium	4%	3%

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

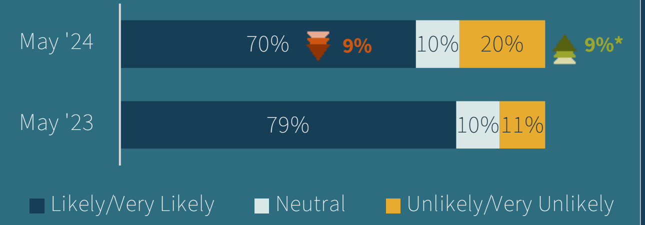
* Statistically significant difference vs a year ago (May 2023)

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

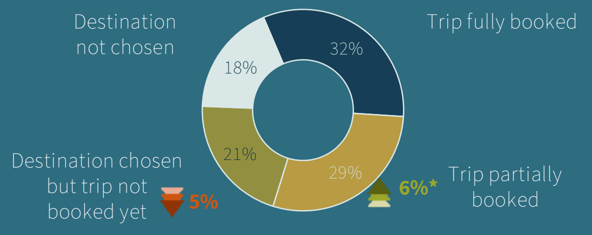
Belgians' travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL



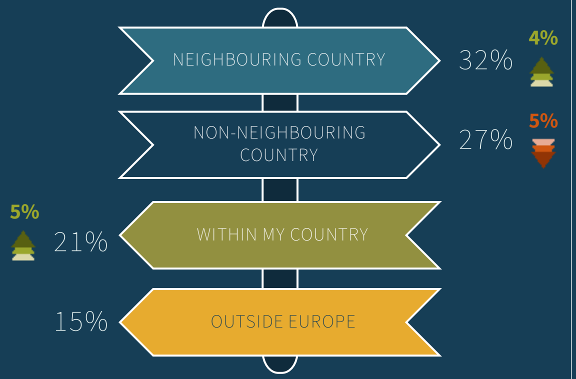
TRAVEL READINESS



POPULAR TRAVEL PERIODS

38%	June-July '24	
36%	August-September '24	3%*
15%	October-November '24	5%*

WHERE TO?



TRAVELLING WITH?

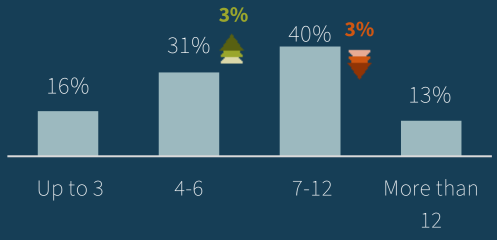
With partner	With family	Solo
31% (4%)	28% (8%)	12%

TOP 3 TYPES OF TRIPS

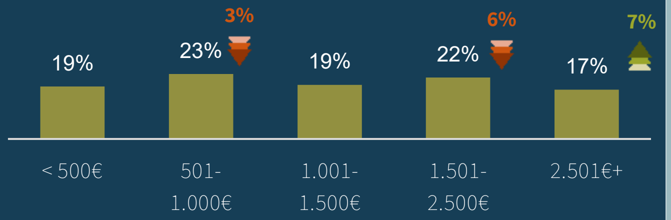
18%	Sun & Beach	
16%	Culture & Heritage	4%
15%	Nature & Outdoor	5%

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
France	13% (7%)	8%
Spain	8%	5%
Italy	7%	4%
Austria	5%	3%
Netherlands	5%	5%

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

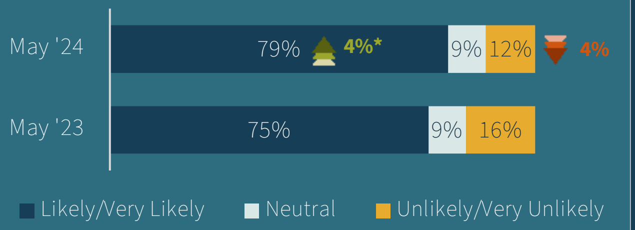
* Statistically significant difference vs a year ago (May 2023)

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

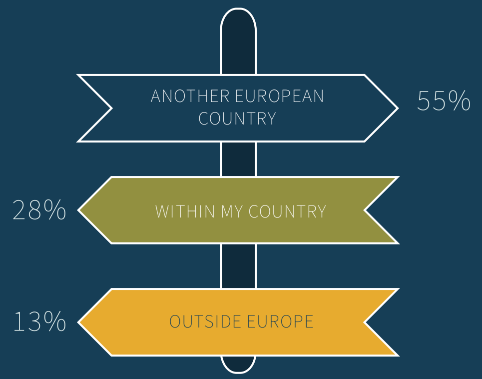
Britons’ travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL



WHERE TO?



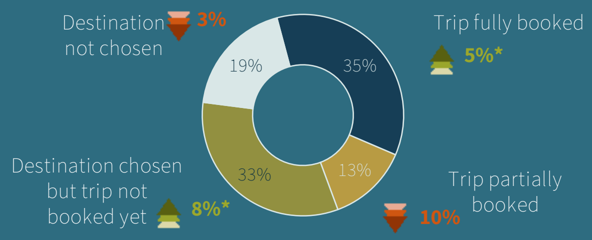
TRAVELLING WITH?

36% (3%)	36% (4%)	13%
With partner	With family	Solo

TOP 3 TYPES OF TRIPS

29%	Sun & Beach	4%
19%	City Break	
11%	Nature & Outdoor	

TRAVEL READINESS

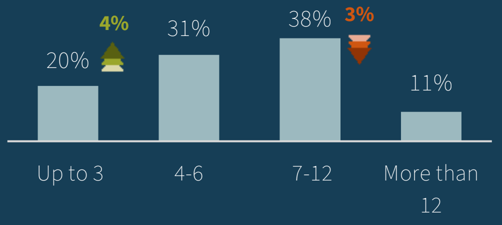


POPULAR TRAVEL PERIODS

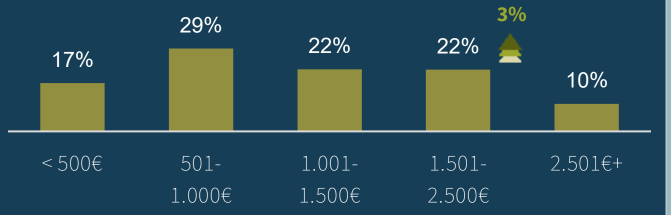
36%	June-July ‘24	5%*
37%	August-September ‘24	
16%	October-November ‘24	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Spain	14%	15%
France	11%	9%
Italy	9%	6%
Greece	8%	7%
Germany	6%	6%

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

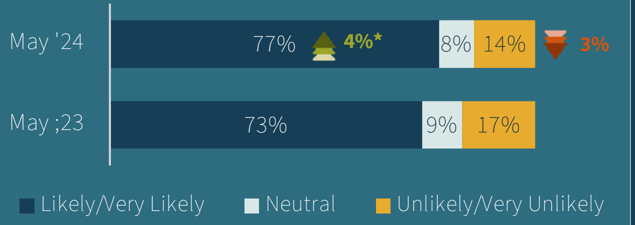
* Statistically significant difference vs a year ago (May 2023)

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

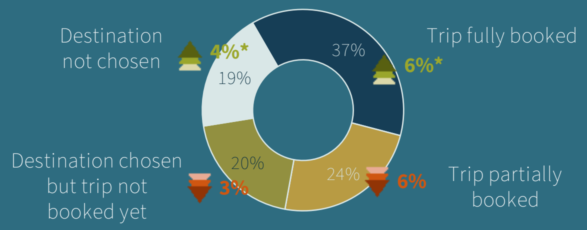
Dutch travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL



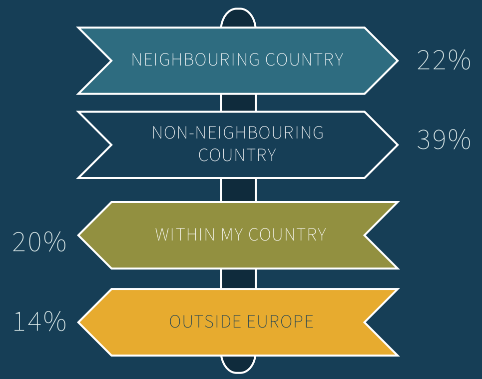
TRAVEL READINESS



POPULAR TRAVEL PERIODS

41%	June-July ‘24	8%*
38%	August-September ‘24	
12%	October-November ‘24	8%

WHERE TO?



TRAVELLING WITH?

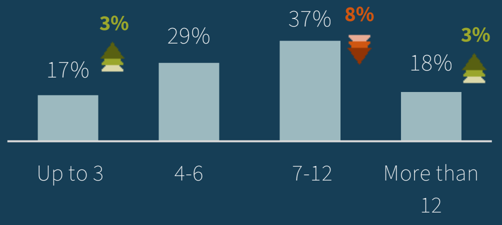
36%	25%	14%
With partner	With family	Solo

TOP 3 TYPES OF TRIPS

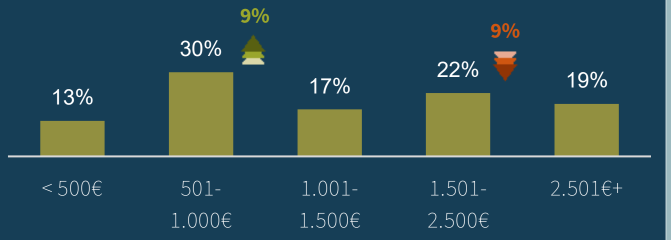
19%	Nature & Outdoors	
18%	City Break	3%
16%	Sun & Beach	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Belgium	8%	7%
France	8%	6%
Spain	7%	5%
Germany	7%	7%
Italy	7%	5%

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

* Statistically significant difference vs a year ago (May 2023)

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

French travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '24	77% 3%	7%	16%
May '23	80%	6%	14%

Likely/Very Likely · Neutral · Unlikely/Very Unlikely

TRAVEL READINESS

Destination not chosen 23%

Trip fully booked 23% 3%

Destination chosen but trip not booked yet 28%

Trip partially booked 26%

POPULAR TRAVEL PERIODS

30%	June-July '24
42%	August-September '24
17%	October-November '24

WHERE TO?

NEIGHBOURING COUNTRY 33%

NON-NEIGHBOURING COUNTRY 15% 3%

WITHIN MY COUNTRY 35%

OUTSIDE EUROPE 14%

TRAVELLING WITH?

With partner	With family	Solo
38% 6%	37%	12% 4%

TOP 3 TYPES OF TRIPS

24%	Culture & Heritage
21%	Sun & Beach 3%
15%	Nature & Outdoors

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
11%	36%	42%	10%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
16%	25% 4%	17%	27% 4%	15%

TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Italy	10%	7%
Greece	9%	5%
Spain	8%	8%
Croatia	6%	4%
Portugal	6%	5%

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

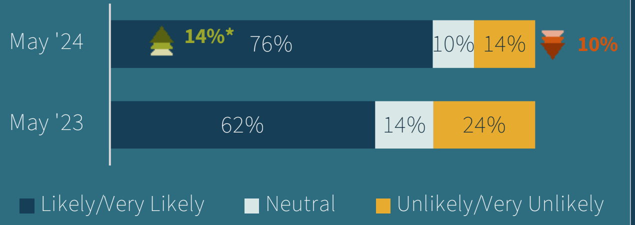
* Statistically significant difference vs a year ago (May 2023)

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

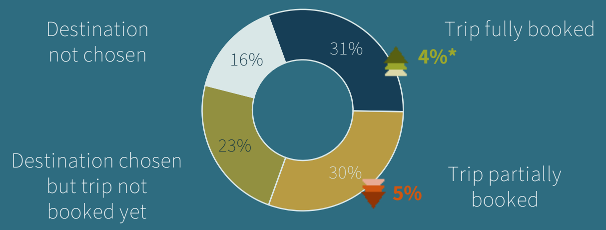
Germans' travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL



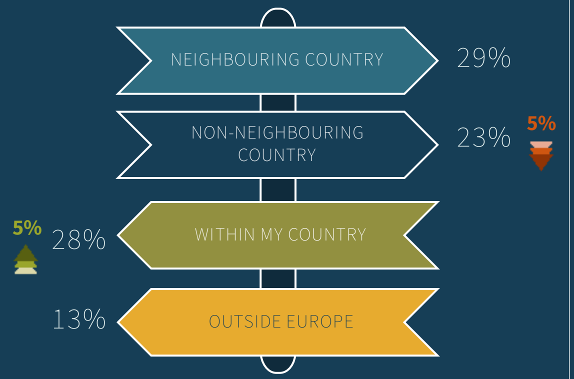
TRAVEL READINESS



POPULAR TRAVEL PERIODS

46%	June-July '24	9%*
33%	August-September '24	
16%	October-November '24	4%

WHERE TO?



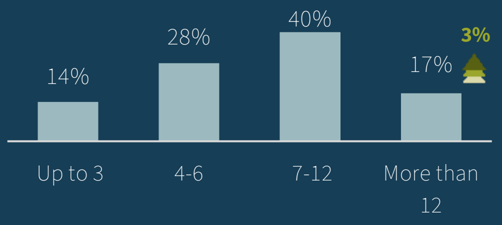
TRAVELLING WITH?

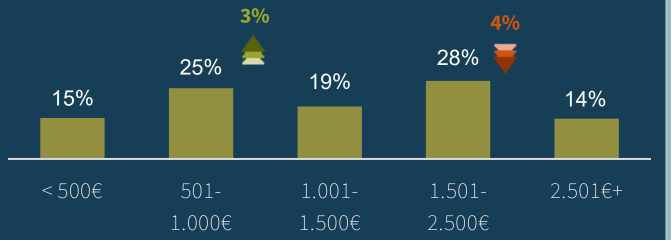
With family	With partner	Solo
36% (7%)	29% (4%)	13%

TOP 3 TYPES OF TRIPS

20%	Sun & Beach	6%
17%	Coast & Sea	4%
16%	Nature & Outdoors	

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Spain	8% (3%)	7%
Austria	8% (4%)	9%
Italy	7%	7%
France	6%	9%
Türkiye	5%	5%

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

* Statistically significant difference vs a year ago (May 2023)

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

Italians' travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '24	81% ▲ 9%*	8% ▼ 4%	11% ▼ 6%
May '23	72%	12%	17%

■ Likely/Very Likely ■ Neutral ■ Unlikely/Very Unlikely

TRAVEL READINESS

- Trip fully booked: 26%
- Trip partially booked: 18% ▼ 7%
- Destination chosen but trip not booked yet: 34% ▲ 4%
- Destination not chosen: 22%

POPULAR TRAVEL PERIODS

44%	June-July '24	▲ 9%*
37%	August-September '24	
10%	October-November '24	▼ 5%

WHERE TO?

- NEIGHBOURING COUNTRY: 24%
- NON-NEIGHBOURING COUNTRY: 28%
- WITHIN MY COUNTRY: 37% ▲ 5%
- OUTSIDE EUROPE: 7% ▼ 3%

TRAVELLING WITH?

39%	34% ▲ 5%	7%
With partner	With family	Solo

TOP 3 TYPES OF TRIPS

35%	Culture & Heritage	▲ 6%
14%	Sun & Beach	
13%	Coast & Sea	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
16%	43% ▲ 3%	32%	8%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
16%	31% ▲ 4%	24% ▲ 7%	19% ▼ 5%	10% ▼ 6%

TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Spain	12%	9%
France	10%	9%
Greece	6%	6%
UK	6%	5%
Portugal	5%	3%

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

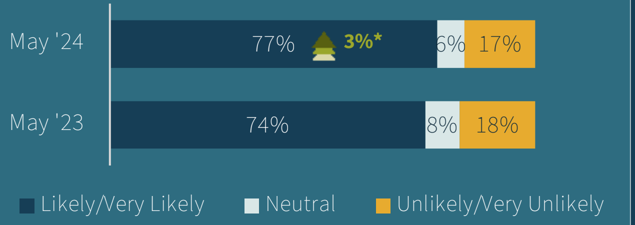
* Statistically significant difference vs a year ago (May 2023)

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

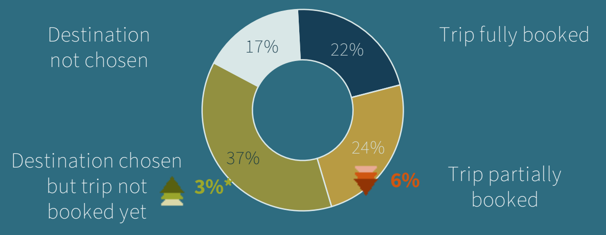
Poles' travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL



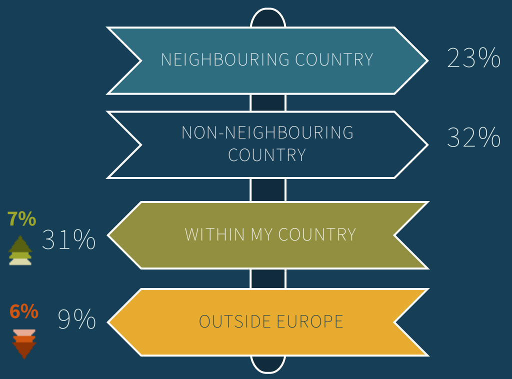
TRAVEL READINESS



POPULAR TRAVEL PERIODS

44%	June-July '24
32%	August-September '24
11%	October-November '24 3%*

WHERE TO?



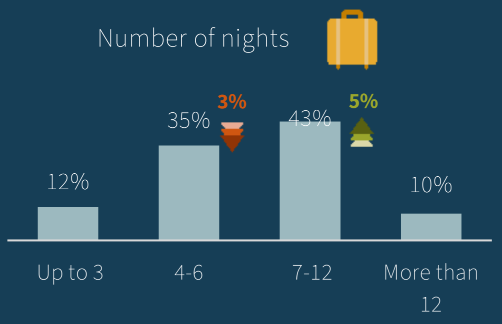
TRAVELLING WITH?

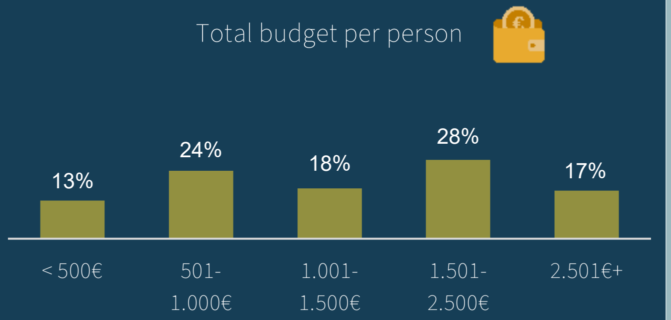
37%	27%	11%
With family	With partner	Solo

TOP 3 TYPES OF TRIPS

18%	Culture & Heritage	5%
15%	Coast & Sea	
15%	City Break	7%

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Croatia	7%	6%
Germany	6%	6%
Italy	6% 4%	5%
Greece	5%	4%
Spain	5%	4%

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

* Statistically significant difference vs a year ago (May 2023)

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

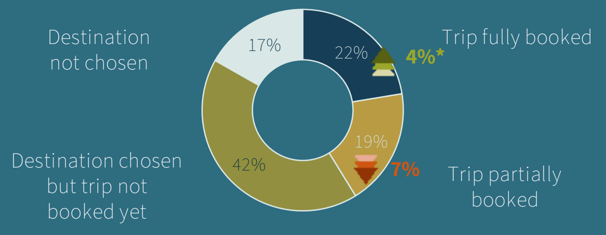
Spaniards' travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '24	81% ▲ 10%*	7%	11% ▼ 10%
May '23	71%	8%	21%

TRAVEL READINESS



POPULAR TRAVEL PERIODS

38%	June-July '24	▲ 5%*
43%	August-September '24	▲ 4%*
12%	October-November '24	▼ 5%

WHERE TO?

NEIGHBOURING COUNTRY	34%	
NON-NEIGHBOURING COUNTRY	17%	▼ 3%
WITHIN MY COUNTRY	41%	▲ 10%
OUTSIDE EUROPE	6%	▼ 5%

TRAVELLING WITH?

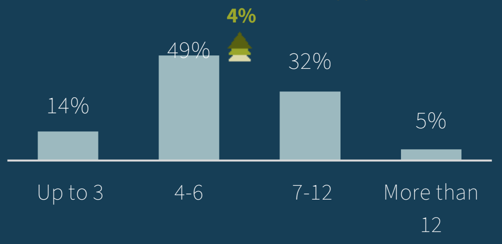
With family	With partner	Solo
42% ▲ 12%	40%	6% ▼ 3%

TOP 3 TYPES OF TRIPS

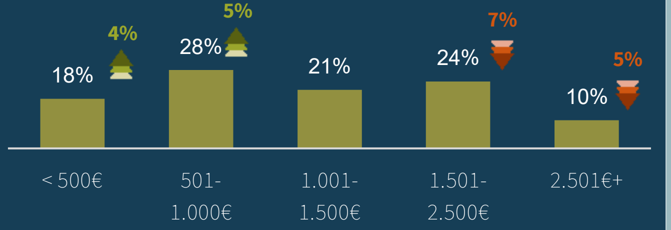
30%	City Break	
21%	Culture & Heritage	▲ 5%
15%	Sun & Beach	

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Italy	15% ▲ 5%	13%
France	13%	20%
Portugal	8%	13%
Germany	7%	10%
UK	6%	5%

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

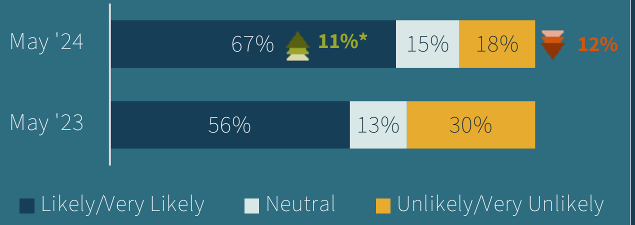
* Statistically significant difference vs a year ago (May 2023)

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

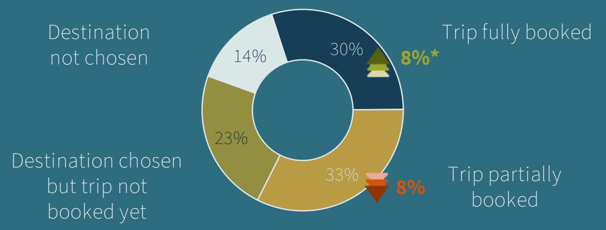
Swiss travel plans

Travel horizon: June 2024-November 2024

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

42%	June-July '24	9%*
33%	August-September '24	5%
16%	October-November '24	5%

WHERE TO?

NEIGHBOURING COUNTRY	33%	5%
NON-NEIGHBOURING COUNTRY	28%	3%
WITHIN MY COUNTRY	17%	
OUTSIDE EUROPE	13%	5%

TRAVELLING WITH?

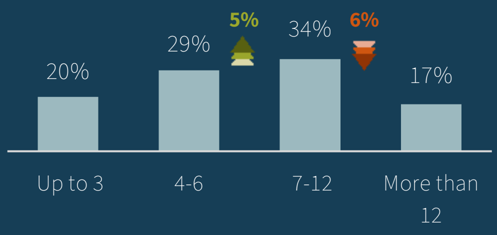
With family	With partner	Solo
30% (3%)	28% (7%)	18%

TOP 3 TYPES OF TRIPS

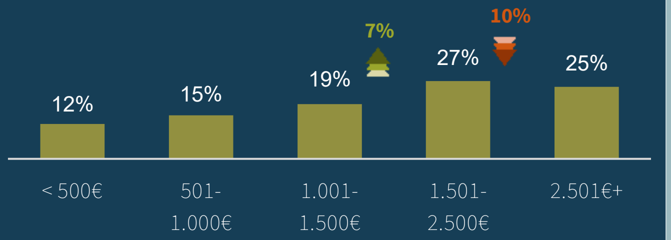
15%	Sun & Beach	
13%	Nature & Outdoors	
13%	Wellness & Relaxation	3%

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS ATTRACTING NEW AND REPEAT VISITORS**

	Plan to visit	Have visited before
Austria	8%	6%
Italy	7%	7%
Germany	6%	7%
France	6%	7%
Spain	5%	4%

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

* Statistically significant difference vs a year ago (May 2023)

No. of respondents: 455 (total sample of respondents per country)

Planning the details

02

36% of Europeans concerned by the economic situation are planning a single trip, vs. only 6% of those planning 3 trips or more.

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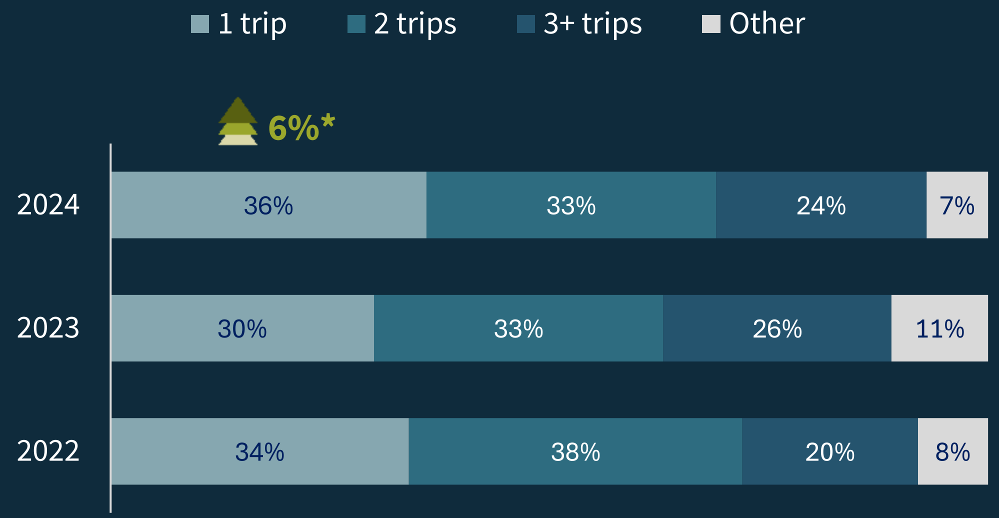
More travellers (+6%) plan to travel only once - possibly due to economic concerns

Number of intended trips within Europe in the next six months



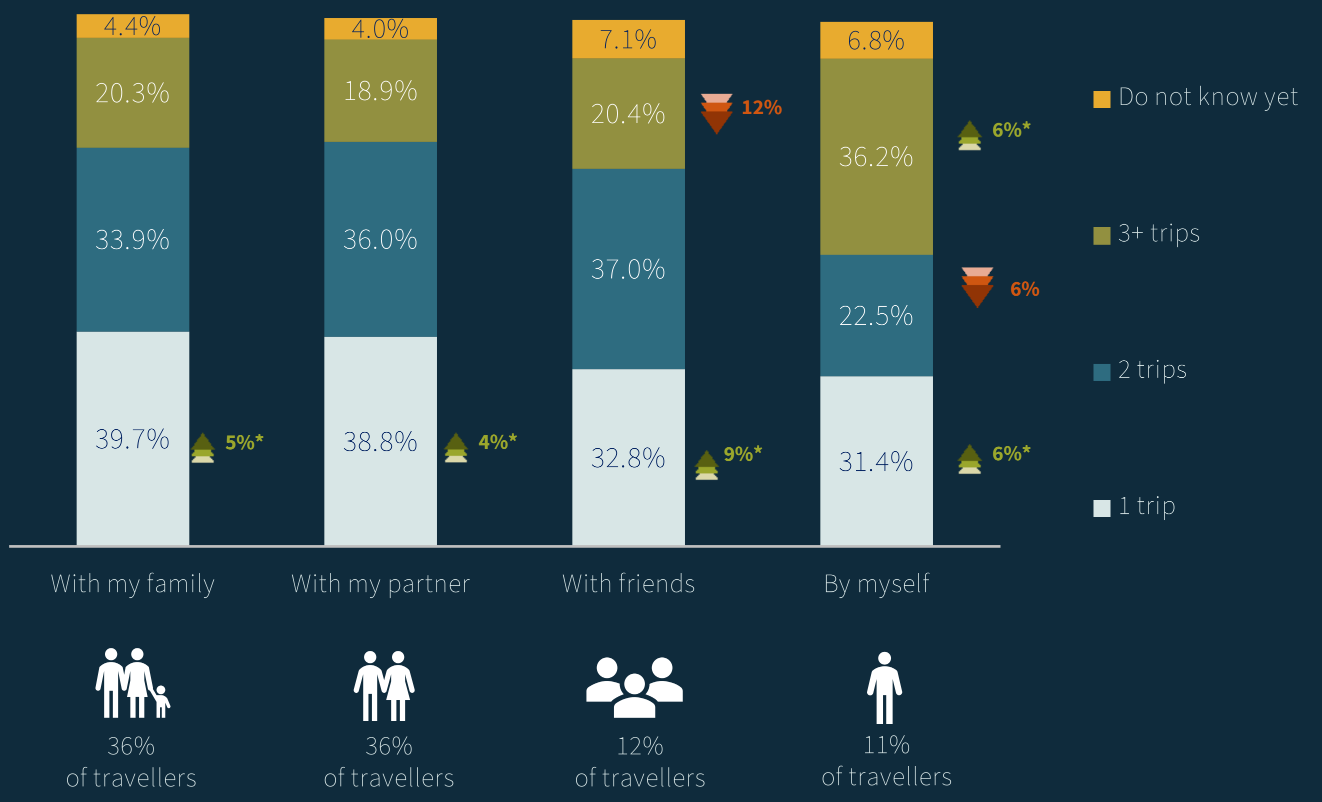
Q9. How many trips do you plan to take in the next 6 months, within Europe?

* Statistically significant difference vs a year ago (May 2023)

No. of respondents: 4,508

Most Europeans will travel with their family or partner; those travelling solo are most likely to take 3 trips or more (+6%)

Number of intended trips within Europe by preferred travel companion

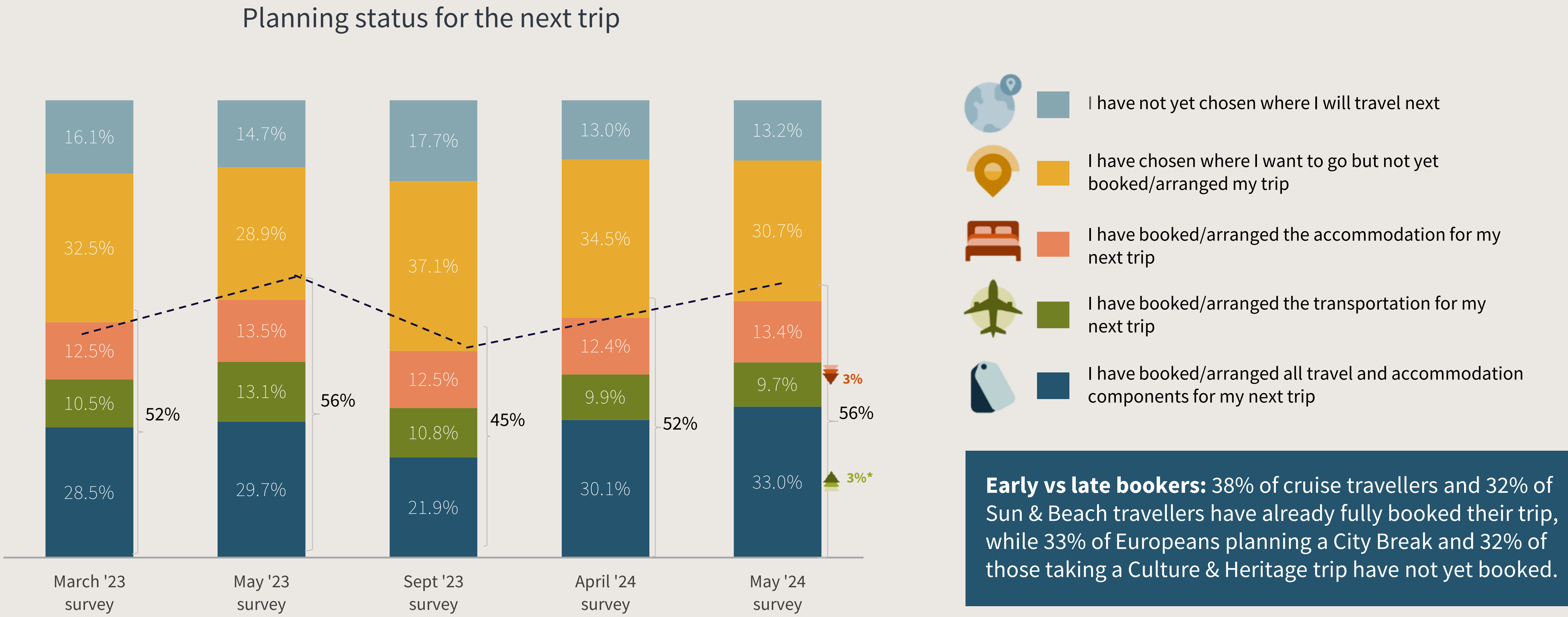


* Statistically significant difference vs a year ago (May 2023)

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

No. of respondents: 4,508

56% of Europeans have already booked their next trip, preparing for the upcoming high season



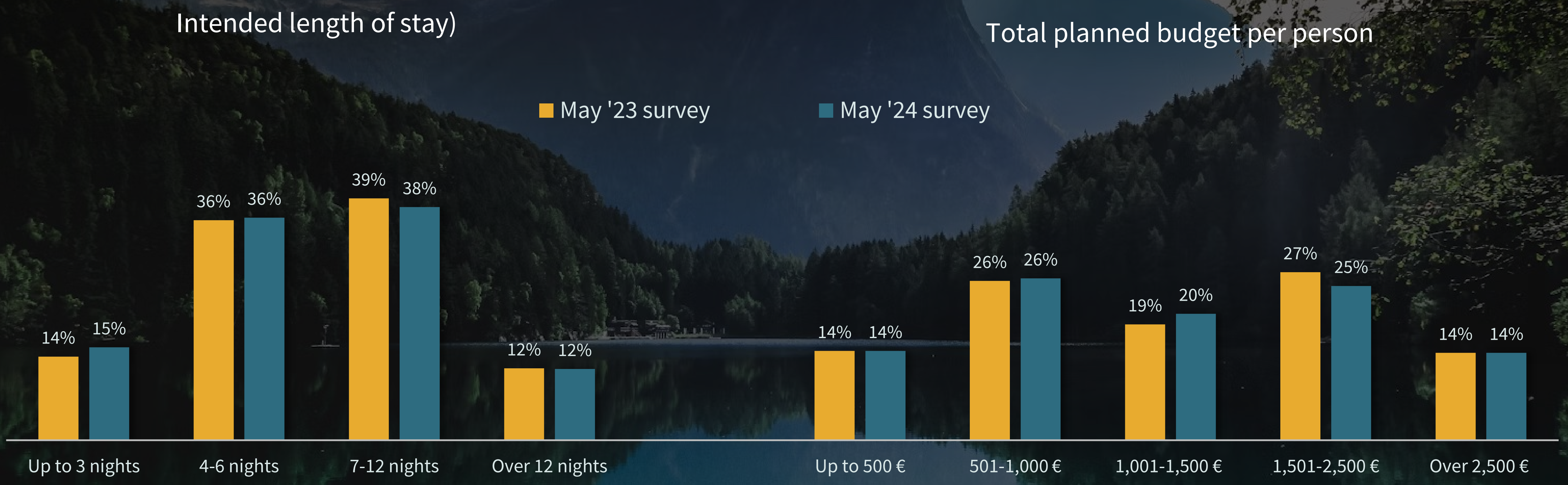
Early vs late bookers: 38% of cruise travellers and 32% of Sun & Beach travellers have already fully booked their trip, while 33% of Europeans planning a City Break and 32% of those taking a Culture & Heritage trip have not yet booked.

Q23. Please select a response which best describes the planning for your next trip

* Statistically significant difference vs a year ago (May 2023)

No. of respondents: 4,508

Despite high prices, Europeans' travel budgets and length of stay remain unchanged for the coming months



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Q18. What would be the length of your next overnight trip?
Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,508

62% of travellers planning yachting trips and 55% planning cruise trips are considering a budget of over 1,500 euros.

Budget allocation by length of trip

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

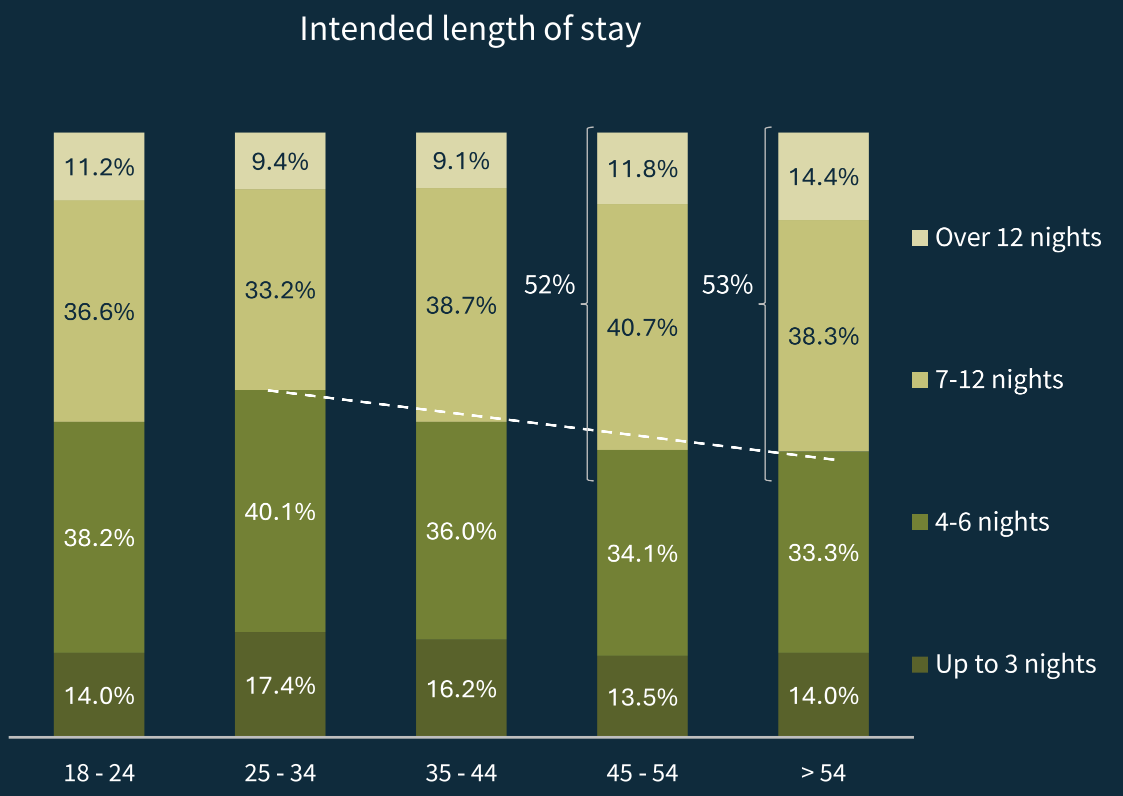
	< 3 nights	4-6 nights	7-12 nights
< 500 €	41%	13%	14%
501 - 1,000 €	30%	33%	39%
1,001 - 1,500 €	12%	23%	44%
1,501 - 2,500 €	8%	24%	63%

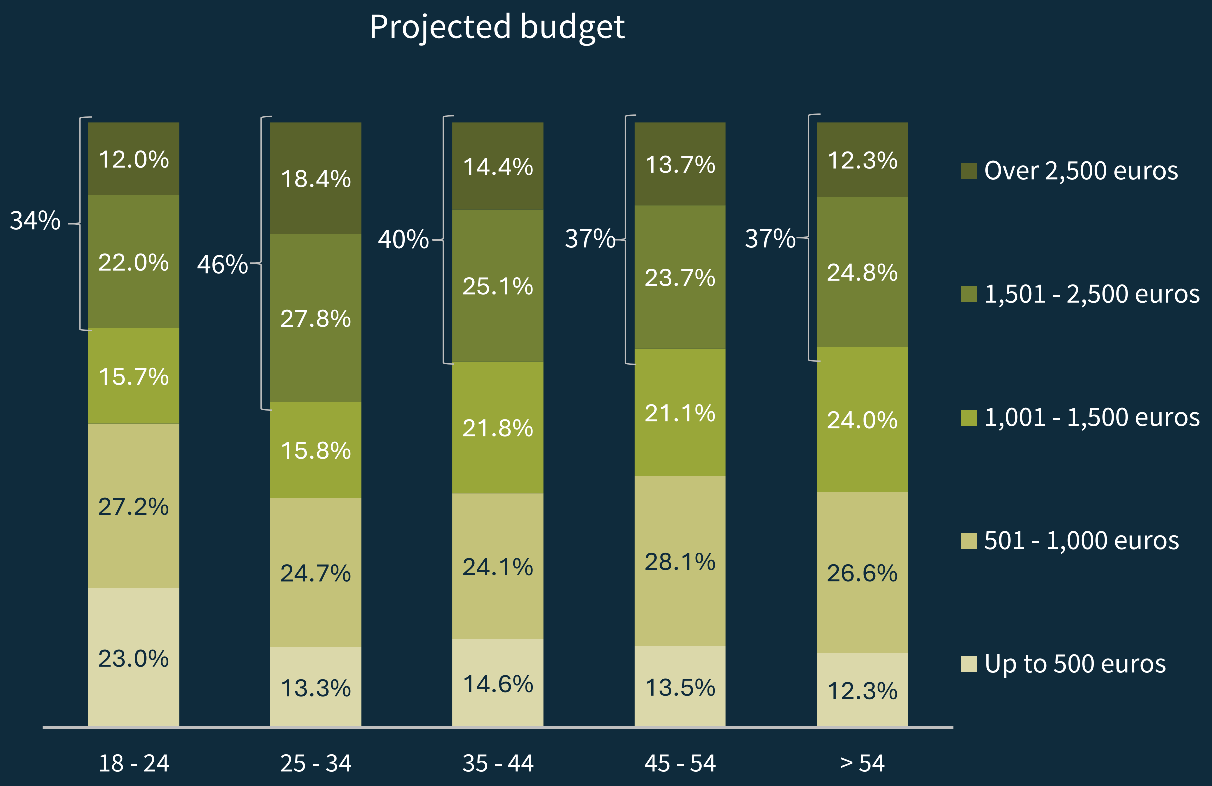
No. of respondents: 4,508

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

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

Europeans over the age of 45 are the most likely to take longer trips, while younger Europeans (aged 25-34) are the most likely to splurge





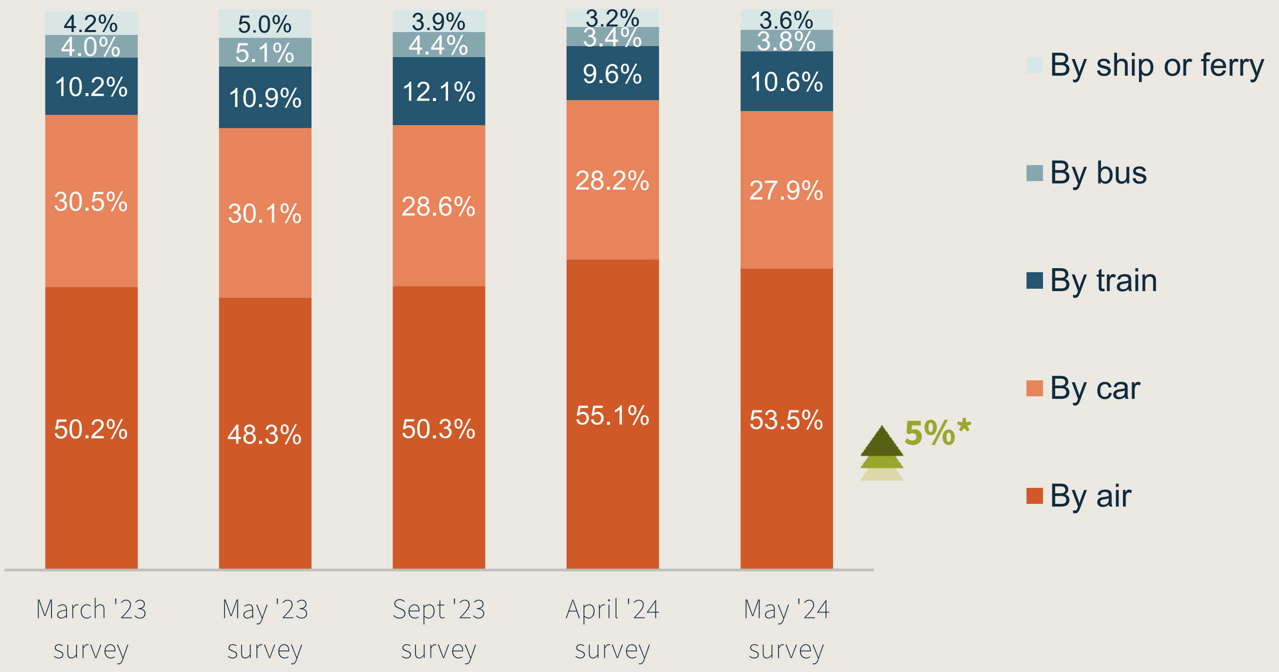
The budget is per person per trip, including accommodation, transportation and travel activities

Q18. What would be the length of your next overnight trip?
Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,508

Over half of Europeans will fly to their next travel destination (+5%)

Preferred modes of transport for intra-European travel



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

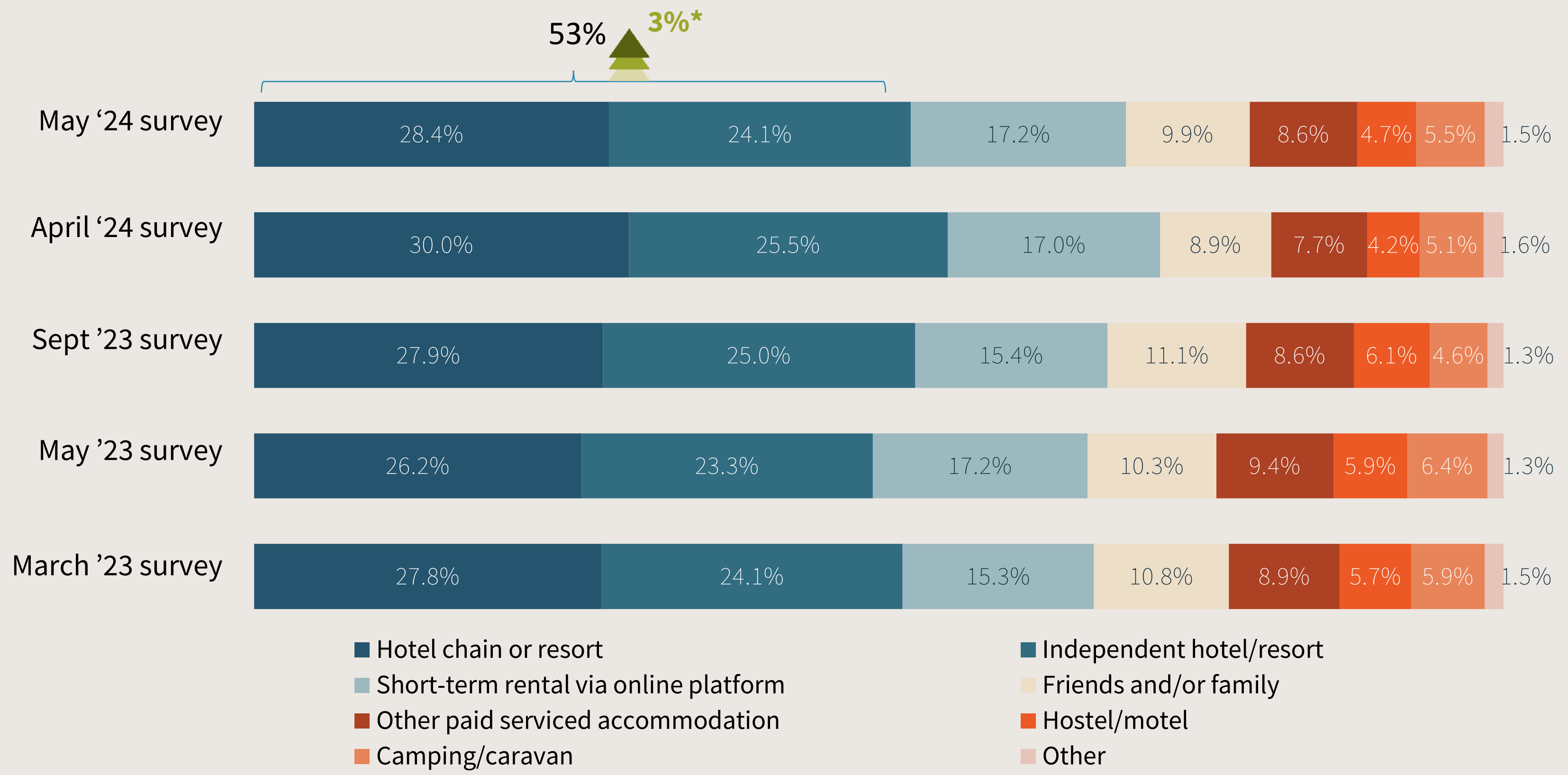
Statistically significant difference vs a year ago (May 2023)

Top driving markets	Top markets to take a plane
GERMANY 40%	UK 73%
BELGIUM 38%	SPAIN 68%
AUSTRIA 35%	ITALY 62%

No. of respondents: 4,508

Hotels are favoured by Europeans as their top choice for accommodation, showing a 3% rise compared to last year

Preferred type of accommodation



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

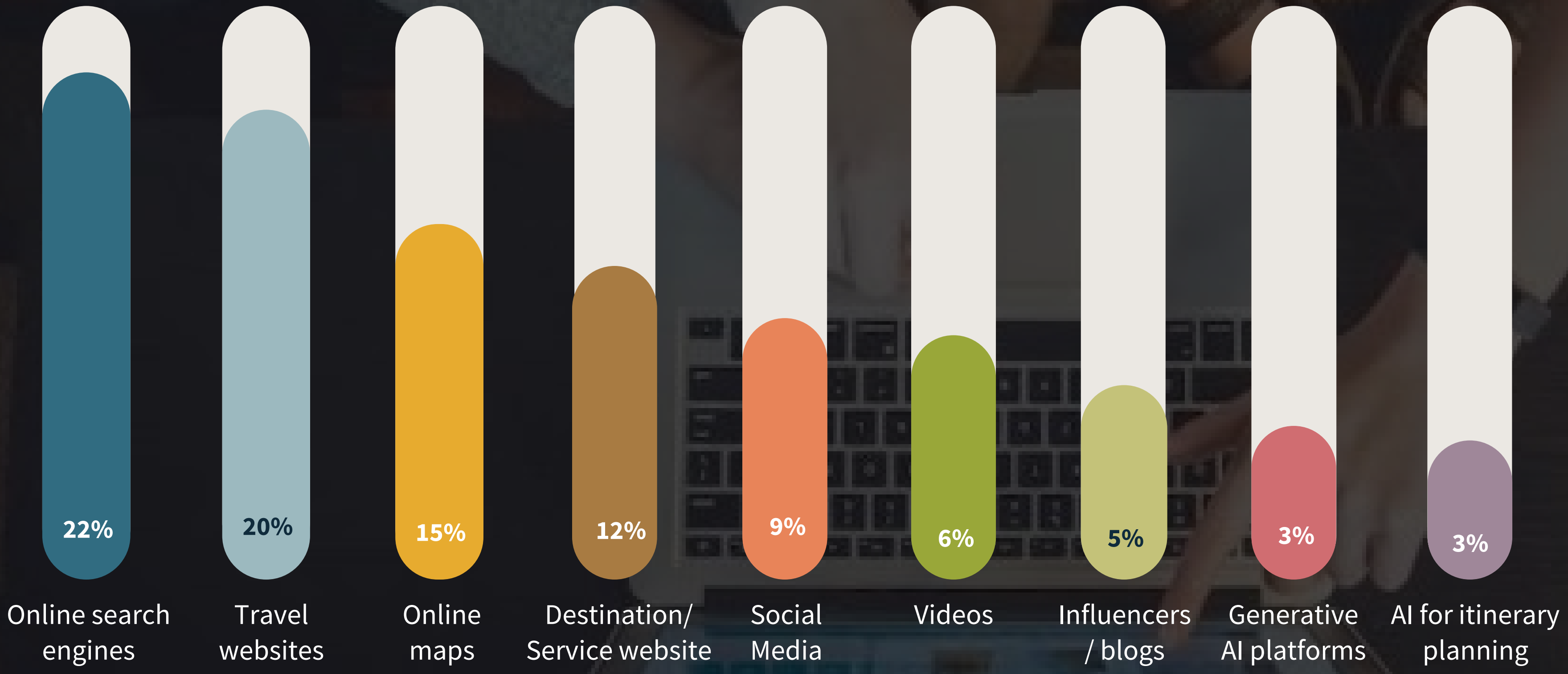
* Statistically significant difference vs a year ago (May 2023)

The leading audience for short-term rentals are families (37%), while the leading audience for hotels are couples (39%).

No. of respondents: 4,508

Search engines and travel websites are the leading digital touchpoint for European travellers

Preferred digital tools for planning next trip



AI early adopters: 42% of travellers using AI apps for itinerary planning, and 35% of those employing Generative AI platforms for travel purposes are young Millennials, aged 25-34.

Q20. Which digital tools have you used (or will use) to plan your trip within Europe in the next 6 months?

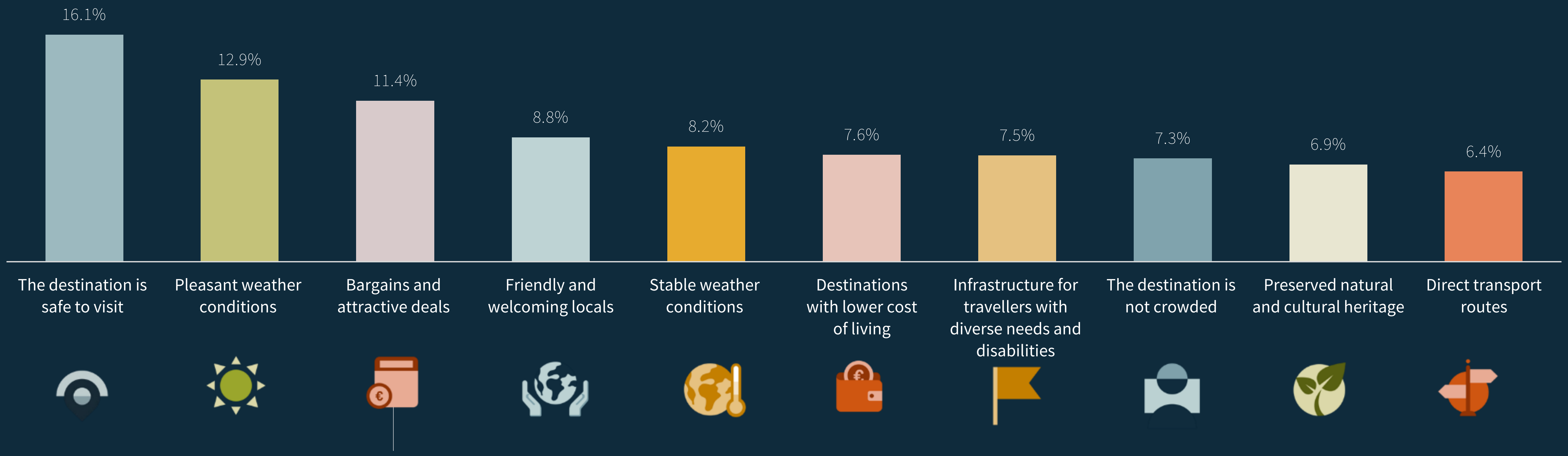
No. of respondents: 4,508

Travel concerns

03

Pleasant weather and stable temperatures are key destination choice factors for 21% of travellers, while safety continues to play a vital role

Europeans’ top criteria in choosing a travel destination



Of those looking for bargains and deals, 45% have below-average income, while only 17% have above-average income.

Q6. What criteria will play the most important role in choosing your next holiday destination?
* This question was changed from W18 onwards

No. of respondents: 5,955

What do European travellers worry about?

Price inflation and personal finances remain the leading concerns for 37% of travellers, followed by geo-political tensions

20.8% 3%

Rise in the overall cost of my trip due to inflation

16.1%

Economic situation and personal finances

11.4%

The ongoing conflict between Russia and Ukraine

10.2%

Potential impacts on travel safety due to tensions in the Middle East

10.1%

Extreme weather events

9.7%

Disruptions in transport options due to strikes, under-staffing , etc.

9.3%

Too many visitors at the destinations I want to visit

6.4%

Booking and cancellation policies (refunds, etc.)

5.2%

The environmental footprint of my travel

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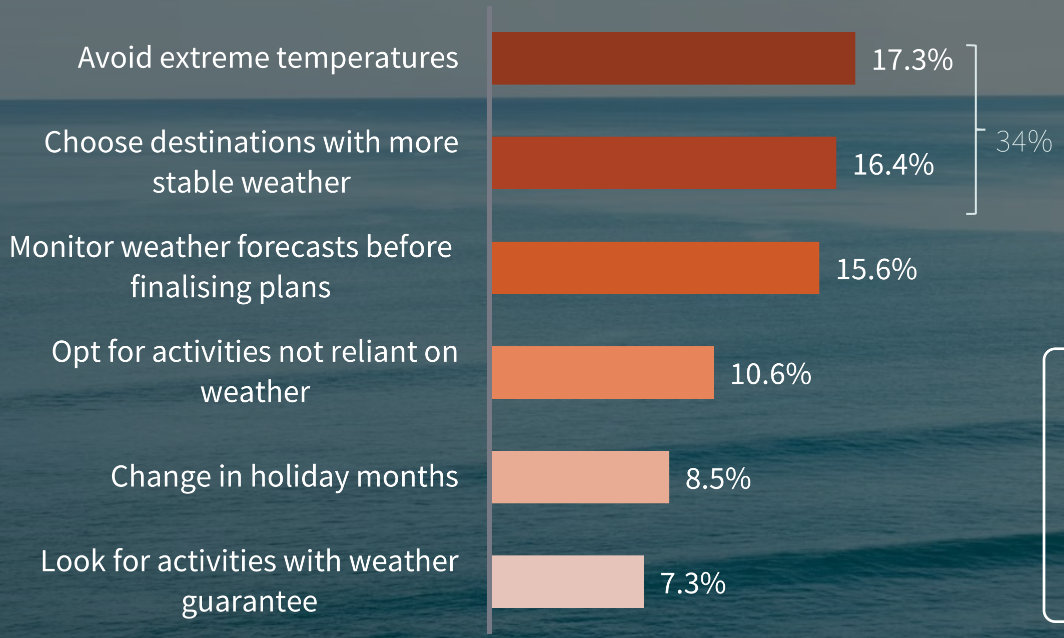
Q5. What currently concerns you the most about travelling within Europe?

No. of respondents: 5,955

Europeans are adjusting their travel habits according to climate change

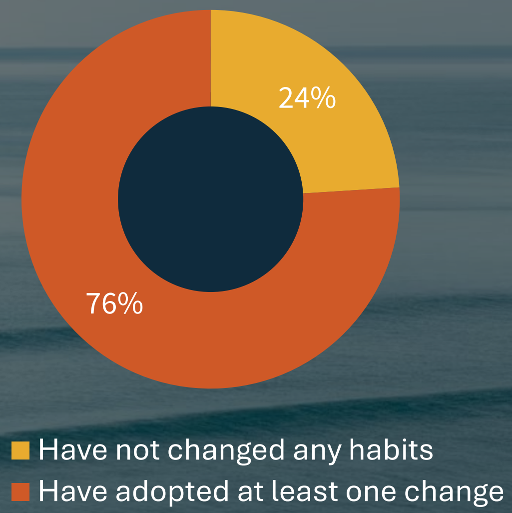
One in three travellers will refrain from extreme weather events, either by avoiding destinations where temperatures could soar to extremes or by choosing a destination with stabler weather

Most popular changes of habits due to climate change



32% of travellers avoiding destinations with extreme temperatures are over the age of 55, compared to only 11% of those aged 18-24.

Europeans who changed their behaviours due to climate change



Q24. How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) have been influencing your travel habits?

No. of respondents: 5,859

Methodology

Methodology

- The report is the result of online market research of Europeans who took at least two overnight trips during the last three years (2021-2023/24)
- Distribution/data collection period:
  - **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 / **Wave 18**: 2-17 April 2024; sample = 5,859 / **Wave 19**: 25 May-7 June 2024; sample = 5,955
  - **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 (eight questions), and travel intentions, preferences and trip planning (fourteen questions)
- 46% of the Wave 19 survey respondents are male, and 54% are female. Sample size and age groups are listed below:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	70	44	84	96	92	56	99	70	78	**777**
	25 - 34	136	112	73	122	128	152	106	138	112	181	**1,260**
	35 - 44	126	134	103	119	140	150	120	61	104	60	**1,117**
	45 - 54	138	168	105	75	146	168	92	79	87	83	**1,141**
	≥55	262	266	175	100	240	188	126	123	82	98	**1,660**
Total		**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**455**	**500**	**5,955**

- **European regions:**
  - Southern/Mediterranean Europe: France, Croatia, Cyprus, Greece, Italy, Malta, Monaco, Montenegro, Portugal, San -Marino, Slovenia, Spain, Türkiye.
  - Western Europe: Austria, Belgium, Germany, Luxembourg, Netherlands, Switzerland
  - Northern Europe: Denmark, Finland, Iceland, Ireland, Norway, Sweden, the UK
  - Central Europe: Czech Republic, Hungary, Poland, Slovakia

Albania, Bosnia-Herzegovina, North Macedonia, Belarus and Moldova are excluded from the regional analysis for comparability reasons since they were introduced in 2024

Study on Monitoring Sentiment for Intra-European Travel

Data sources: This report is based on research conducted by MINDHAUS (www.mindhaus.gr) and should be interpreted by users according to their needs.

Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to eliminate every margin of error.

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