MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 14 | 02/23

EUROPEAN TRAVEL COMMISSION

Co-funded by the European Union

WAVE 14

RESEARCH HIGHLIGHTS

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

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

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

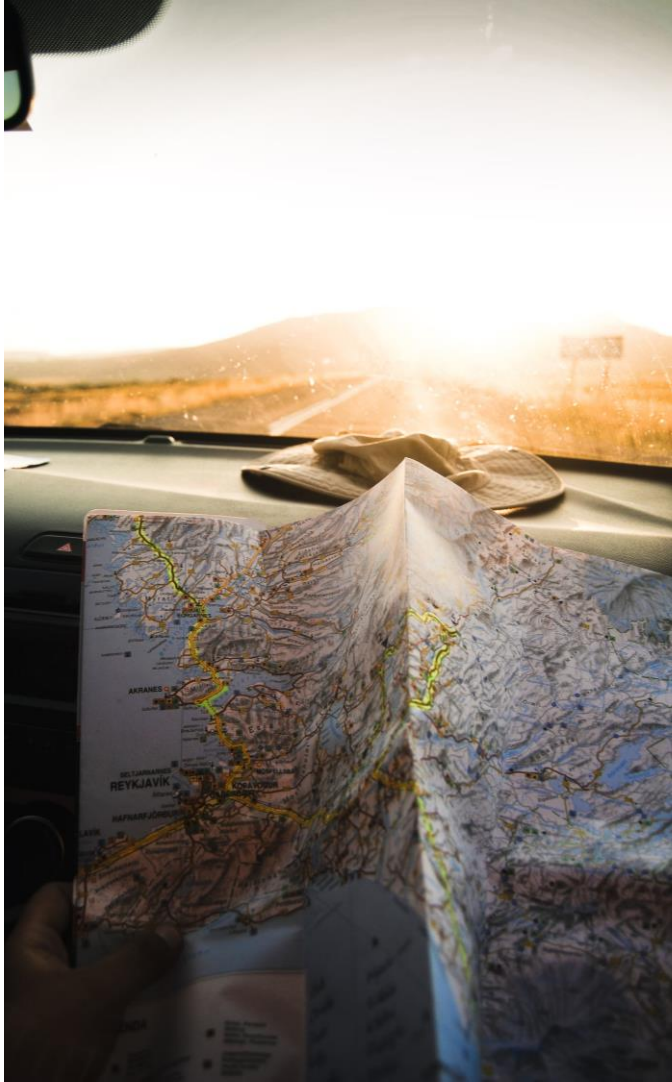
WAVE 14

RESEARCH HIGHLIGHTS

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

WAVE 14
RESEARCH HIGHLIGHTS

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



WAVE 14

RECOMMENDATIONS FOR DESTINATIONS

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

WAVE 14

RECOMMENDATIONS FOR BUSINESSES

- 58% of Europeans have either partly booked their next trip or have chosen a destination but have not yet booked. To encourage these consumers to take a step further and complete their booking, **businesses could employ re-marketing and lead-nurturing tactics** to re-engage with audiences who have already interacted with the brand**,** (e.g., by displaying ads to prospective customers who visited a site without checking out).

- 32% of Europeans planning to travel in May-June have already fully/partially booked their trip. In response to the high level of interest in travel bargains and deals and in order to capitalise on this momentum, businesses can **promote affordable packages for this period and reward early-bookers**.

- As Europeans consider less expensive accommodation, hotels can **offer room-only stays, cheaper accommodation that excludes hotel amenities and daily housekeeping, and discounts for booking multiple nights**. They can also offer **all-inclusive packages** that allow visitors to have better control over their spending.

- 32% of Europeans over the age of 55 plan a domestic trip by June 2023, and **businesses targeting local travellers can promote culture and heritage attractions (38%)** and experiences that focus on **enjoying nature** (19%), **tasting the local cuisine** (18%) and **exploring the local culture** (17%) - the preferred activities of this age group.

CONTENTS

How to read

Wave 14

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

	Wave 10	Wave 11	Wave 12	Wave 13	Wave 14
Survey dates	23-31 Dec ‘21	1-9 March ‘22	9-12 May ‘22	13-23 Sept ‘22	15-29 Dec ‘22

2. **To present Wave 14 timings in which respondents are ’most likely to take their next trip’, the following time periods should be used as a reference:**
   - In 1-2 months: January - February 2023
   - In 3-4 months: March - April 2023
   - In 5-6 months: May - June 2023
3. **To present data and insights, the following distinct groups have been analysed:**
   - Total respondents: 6,000
   - Respondents most likely to travel in the next 6 months: 4,606
   - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,655
4. **Significant changes between current and previous waves are calculated on a 2.5% significance level. Statistically significant differences are marked using the following symbols:**
   - Increasing ▲, decreasing ▼
   - Numbers next to the arrows reflect the actual change in the share of respondents selecting a specific response between current and previous waves

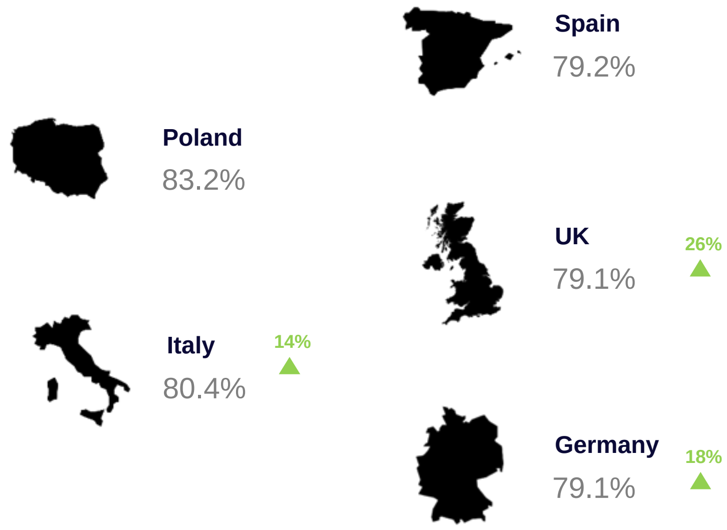
6. **All data and insights refer to domestic and intra-European travel, unless otherwise stated.**

TRAVEL INTENTIONS

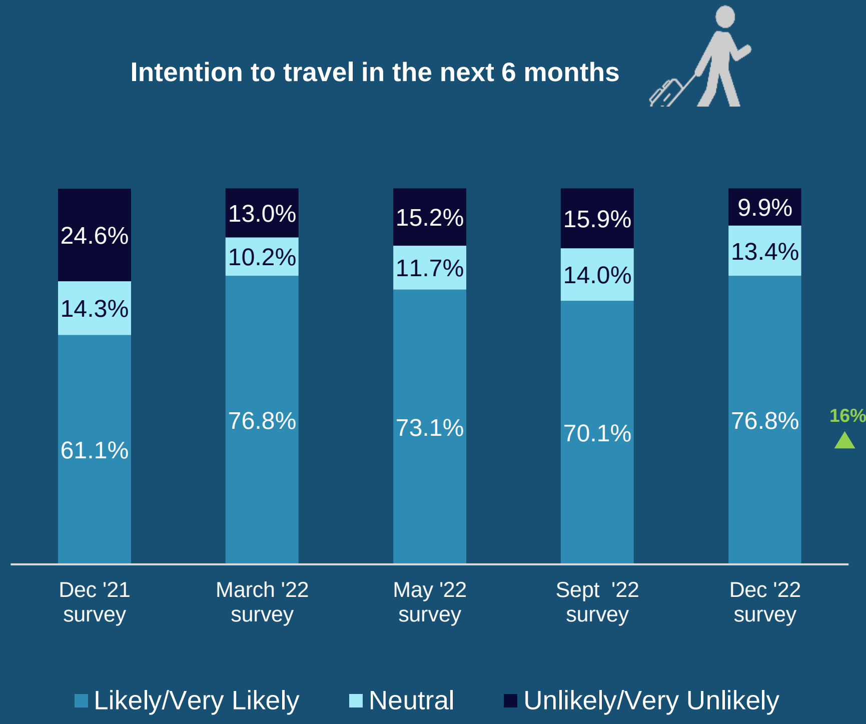
01

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

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



Intention to travel in the next 6 months

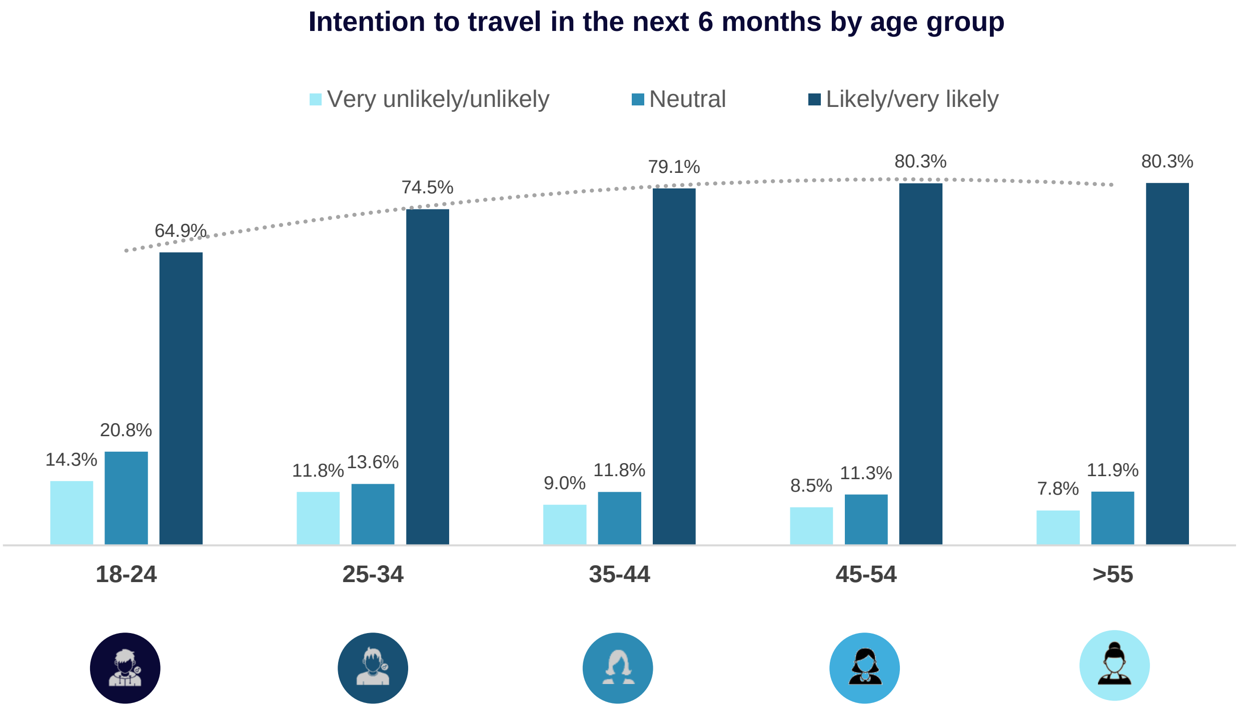


*Statistically significant difference vs a year ago (December 2021)

No. of respondents: 6,000

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

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



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

Top travel experiences by age group:

18-24
16% enjoy natural landscapes
15% sightseeing
13% dive into local culture

25-34
17% enjoy natural landscapes
16% sightseeing
16% taste local cuisine

35-44
19% enjoy natural landscapes
17% taste local cuisine
14% dive into local culture

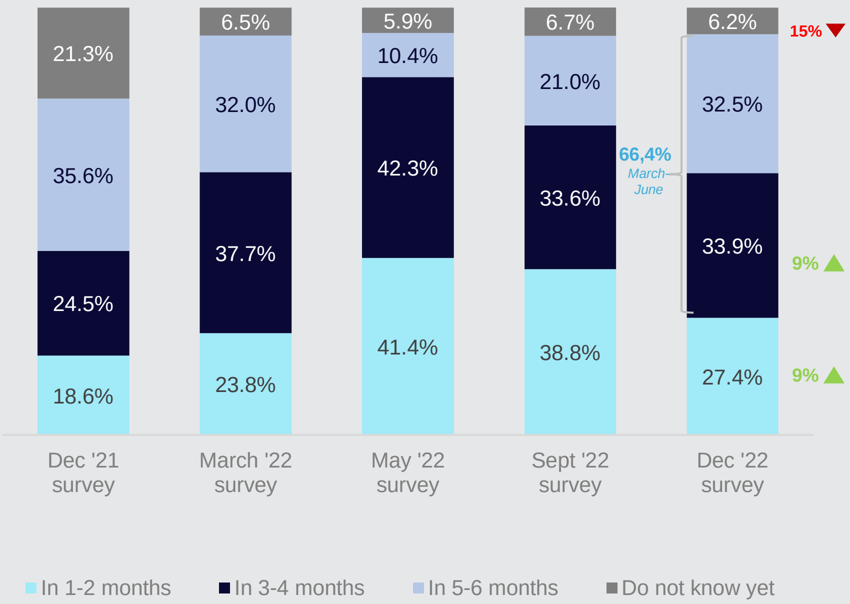
45-54
20% enjoy natural landscapes
17% taste local cuisine
15% the dive into local culture

55+
19% enjoy natural landscapes
18% taste local cuisine
17% dive into local culture

No. of respondents: 6,000

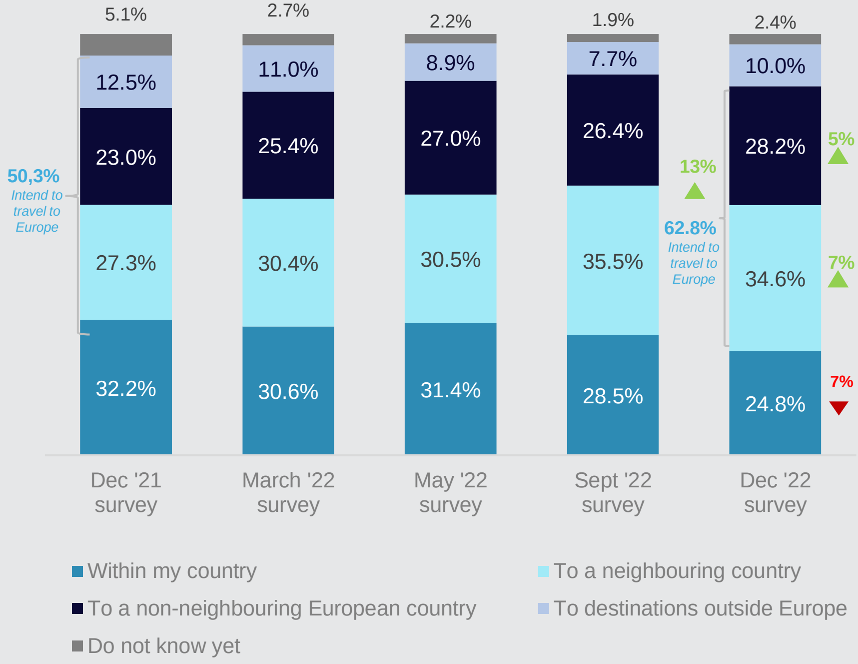
The majority of Europeans (66%) plan trips from March onwards.
Interest in visiting non-neighbouring destinations grows significantly compared to a year ago

When will Europeans travel next?



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

Where will Europeans travel within the next 6 months?



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

* Statistically significant difference vs a year ago (December 2021)

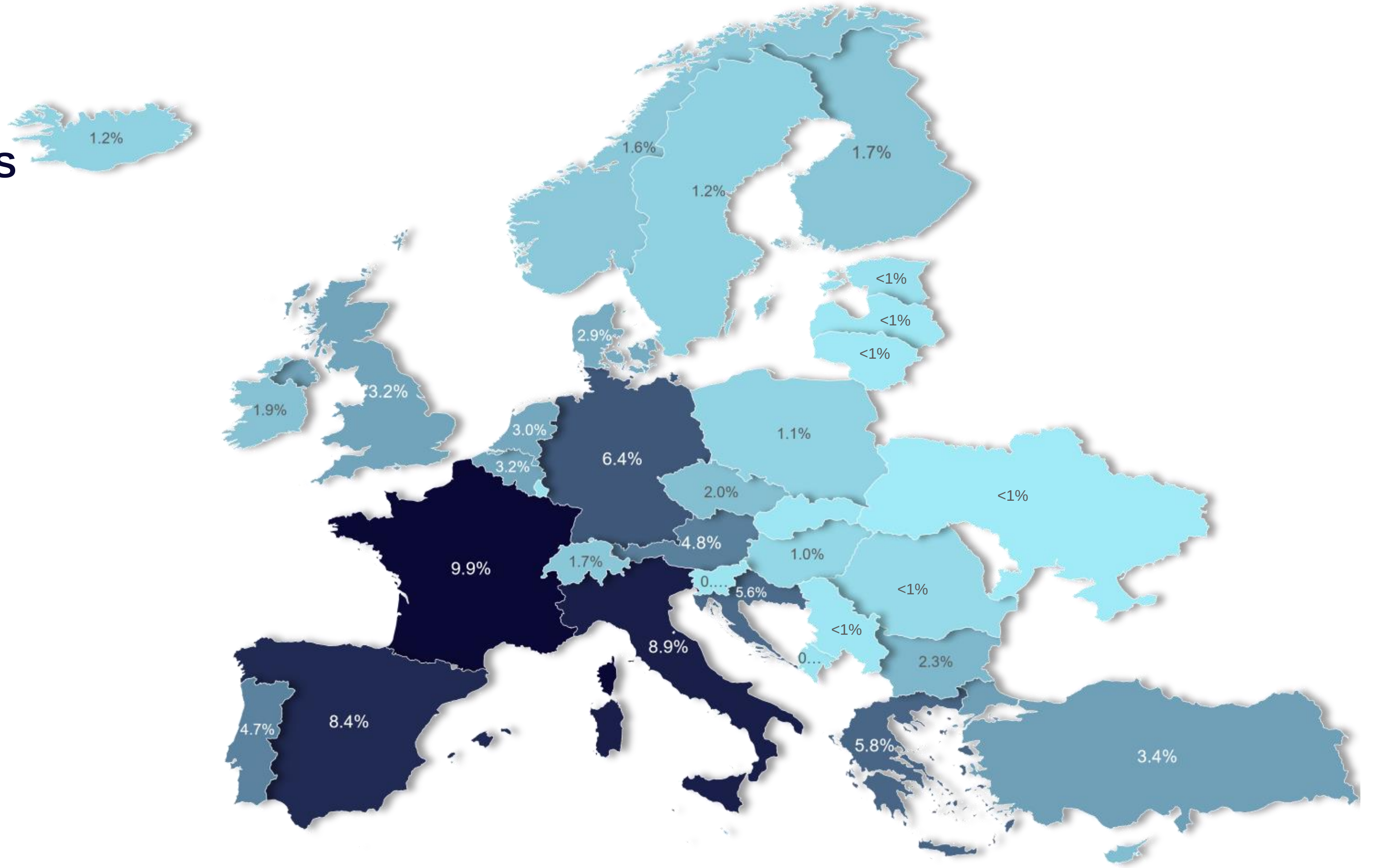
No. of respondents: 4,606

Dec ‘22 survey

PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

TOP 10 COUNTRIES

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



*Please use this map as a reference only

No. of respondents: 4,655

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

* No statistically significant differences between waves were recorded

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

Top 3 markets to take a leisure trip

France
79.1%

Belgium
78.9%

Poland
76.9%

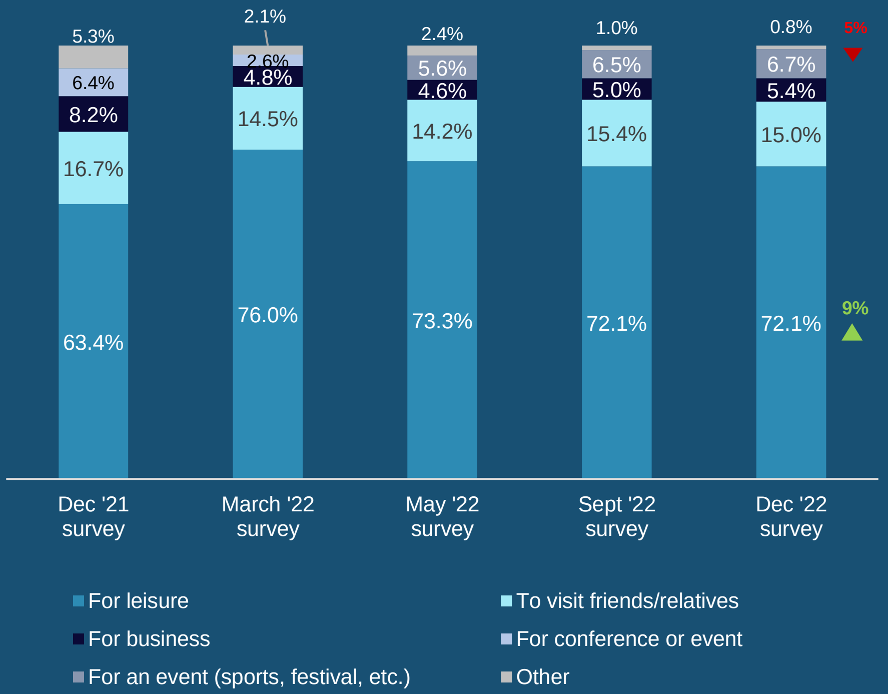
Top 3 markets to take a business trip

Switzerland
9.2%

Austria
7.7%

Netherlands
7.3%

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



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

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

* Statistically significant difference vs a year ago (December 2021)

No. of respondents: 4,606

Sun & Beach, City Break and Culture & Heritage trips are Europeans' leading choices for January-June 2023. Travellers look forward to enjoy nature or explore the culture and gastronomy of European destinations.

Preferred type of leisure trip in the next 6 months

Preferred type of experiences in the next 6 months

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?

* The question was introduced in May'22.

No. of respondents: 4,606

EUROPEANS' PREFERENCES FOR TRIP TYPES AND EXPERIENCES

Travel horizon: January-June 2023

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

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

No. of respondents: 4,606

A SNAPSHOT OF GERMAN TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec '22	79% ▲ 19%*	12%	9% ▼ 15%*
Dec 21	61%	16%	24%

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

TRAVEL READINESS

- Destination not chosen: 17% ▼ 6%*
- Trip fully booked: 22% ▲ 6%*
- Trip partially booked: 23%
- Destination chosen but trip not booked yet: 38%

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
25%	33%	32%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 27%
- NON-NEIGHBOURING COUNTRY: 25% ▲ 3%*
- WITHIN MY COUNTRY: 34% ▲ 5%*
- OUTSIDE EUROPE: 9%

AND WITH WHOM?

- 41% with family ▲ 11%*
- 36% with partner
- 13% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
17%	33% ▲ 11%*	27%	13%	10% ▼ 8%*

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
18%	30% ▲ 3%*	20%	15%	7%	6%	3%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 24% ▲ 7%*
- Nature & Outdoors: 17%
- Coast & Sea: 15%

TOP 5 EUROPEAN DESTINATIONS**

Austria	12% ▲ 6%*
Italy	10%
Spain	9%
Türkiye	8%
Greece	7%

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

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

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

A SNAPSHOT OF BRITISH TRAVEL PLANS

Travel Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	79% ▲ 27%*	14%	7% ▼ 22%*
Dec 21	53%	19%	29%

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

TRAVEL READINESS

- Trip fully booked: 25% ▲ 10%*
- Trip partially booked: 24% ▼ 6%*
- Destination chosen but trip not booked yet: 31%
- Destination not chosen: 20% ▼ 8%*

POPULAR TRAVEL PERIODS

- January-February '23: 20%
- March-April '23: 40% ▲ 17%*
- May-June '23: 29%

TRAVEL PLANNING

WHERE TO?

- ANOTHER EUROPEAN COUNTRY: 60% ▲ 29%*
- WITHIN MY COUNTRY: 26%
- OUTSIDE EUROPE: 11% ▼ 7%*

AND WITH WHOM?

- 42% with family ▲ 13%*
- 38% with partner ▲ 14%*
- 9% solo

INTENDED LENGTH OF STAY AND BUDGET

Length of stay	%
Up to 3 nights	19%
4-6 nights	37% ▲ 8%*
7-9 nights	29% ▲ 7%*
10-12 nights	9% ▼ 6%*
Over 12 nights	7% ▼ 9%*

Budget	%
Up to 500€	17%
501-1.000€	31% ▲ 7%*
1.001-1.500€	22%
1.501-2.000€	16%
2.001-2.500€	8%
2.501-3.000€	4%
3.001€+	2% ▼ 9%*

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 26% ▲ 11%*
- City Break: 20% ▲ 6%*
- Coast & Sea: 11%

TOP 5 EUROPEAN DESTINATIONS**

Spain	12% ▲ 4%*
France	10%
Italy	7%
Cyprus	6% ▲ 4%*
Belgium	5%

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

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

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

A SNAPSHOT OF FRENCH TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	75% ▲ 12%*	12%	13% ▼ 11%*
Dec 21	63%	12%	24%

TRAVEL READINESS

Destination not chosen	23% ▼ 5%*
Trip fully booked	22% ▲ 6%*
Trip partially booked	18% ▼ 12%*
Destination chosen but trip not booked yet	**37%**

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
18%	30% ▲ 7%*	40%

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	38% ▲ 9%*
NON-NEIGHBOURING COUNTRY	15%
WITHIN MY COUNTRY	30% ▼ 7%*
OUTSIDE EUROPE	15%

AND WITH WHOM?

with family	with partner	solo
40% ▲ 6%*	41%	7%

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
11%	37% ▲ 7%*	31%	11%	9% ▼ 6%*

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
17%	27%	20%	14%	11%	6%	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	21% ▲ 5%*
Sun & Beach	19%
Coast & Sea	14%

TOP 5 EUROPEAN DESTINATIONS**

Italy	12%
Spain	11%
Portugal	9%
Greece	8%
Croatia	6%

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

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

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

A SNAPSHOT OF DUTCH TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	71% ▲19%*	19%	10% ▼22%*
Dec 21	52%	16%	32%

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

TRAVEL READINESS

- Trip fully booked: 24% ▲6%*
- Trip partially booked: 26% ▼5%*
- Destination chosen but trip not booked yet: 30%
- Destination not chosen: 20%

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
24%	33%	32%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 24%
- NON-NEIGHBOURING COUNTRY: 42% ▲14%*
- WITHIN MY COUNTRY: 19%
- OUTSIDE EUROPE: 11% ▼8%*

AND WITH WHOM?

- 34% with family ▲14%*
- 40% with partner ▲17%*
- 8% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
13%	34% ▲13%*	28% ▲5%*	13% ▼4%*	12% ▼7%*

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
11%	27% ▲8%*	24%	18% ▲8%*	12%	4% ▼8%*	4% ▼9%*

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 22% ▲9%*
- Nature & Outdoors: 21% ▲9%*
- City Break: 18% ▲6%*

TOP 5 EUROPEAN DESTINATIONS**

Germany	9%
Spain	9%
France	8%
Belgium	7%
Austria	7%

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

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

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

A SNAPSHOT OF ITALIAN TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	80% ▲ 14%*	12%	7% ▼ 10%*
Dec 21	67%	16%	17%

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

TRAVEL READINESS

- Destination not chosen: 23% ▼ 13%*
- Trip fully booked: 22% ▲ 9%*
- Trip partially booked: 20% ▲ 10%*
- **Destination chosen but trip not booked yet**: 35% ▼ 6%*

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
25% ▲ 11%*	35% ▲ 14%*	27% ▼ 9%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 26% ▲ 6%*
- NON-NEIGHBOURING COUNTRY: 26%
- WITHIN MY COUNTRY: 36% ▼ 12%*
- OUTSIDE EUROPE: 8%

AND WITH WHOM?

- 39% with family
- 39% with partner
- 7% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
21% ▲ 4%*	46%	23%	6%	4%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
17% ▼ 6%*	31%	23%	14%	7%	6%	2%

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%** ▲ 6%*
- Sun & Beach: **10%**
- Wellness & relaxation: **10%**

TOP 5 EUROPEAN DESTINATIONS**

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

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

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

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

A SNAPSHOT OF BELGIAN TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	74% ▲18%*	13%	13% ▼16%*
Dec 21	56%	15%	29%

TRAVEL READINESS

Destination not chosen	24%
Trip fully booked	24% ▲5%*
Trip partially booked	22% ▼7%*
Destination chosen but trip not booked yet	**30%**

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
25%	30% ▲9%*	31%

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	40% ▲12%*
NON-NEIGHBOURING COUNTRY	29%
WITHIN MY COUNTRY	14% ▼6%*
OUTSIDE EUROPE	11%

AND WITH WHOM?

with family	with partner	solo
38% ▲7%*	36% ▲7%*	13%

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
21%	33% ▲8%*	26%	10% ▼7%*	10%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
20%	32% ▲7%*	21% ▲7%*	11%	8%	5% ▼5%*	3% ▼6%*

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Nature & Outdoors	22% ▲10%*
Sun & Beach	17%
City Break	15%

TOP 5 EUROPEAN DESTINATIONS**

France	23% ▲8%*
Italy	10% ▲4%*
Spain	9%
Netherlands	7%
Greece	5%

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

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

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

A SNAPSHOT OF SWISS TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	68% ▲21%*	17%	14% ▼24%*
Dec 21	48%	14%	38%

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

TRAVEL READINESS

- Destination not chosen: 20%
- Trip fully booked: 22% ▲7%*
- Trip partially booked: 35% ▼4%*
- **Destination chosen but trip not booked yet**: 23%

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
28%	34% ▲8%*	28%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 37% ▲13%*
- NON-NEIGHBOURING COUNTRY: 30% ▲10%*
- WITHIN MY COUNTRY: 17% ▼5%*
- OUTSIDE EUROPE: 12% ▼7%*

AND WITH WHOM?

- 34% with family ▲14%*
- 32% with partner ▲13%*
- 13% solo ▼6%*

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
21%	34% ▲11%*	23%	13%	9% ▼10%*

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
13%	24% ▲6%*	21% ▲8%*	19% ▲5%*	9% ▼6%*	7% ▼7%*	7%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: **16%** ▲16%*
- Nature & Outdoors: **14%**
- City Break: **13%** ▲5%*

TOP 5 EUROPEAN DESTINATIONS**

Italy	11% ▲6%*
Germany	10% ▲5%*
France	9% ▲5%*
Spain	7%
Austria	6%

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

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

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

A SNAPSHOT OF SPANISH TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	79%	13%	8%
Dec 21	76%	11%	14%

TRAVEL READINESS

- Destination not chosen: 19%
- Trip fully booked: 11%
- Trip partially booked: 16% (▲ 5%*)
- Destination chosen but trip not booked yet: 54%

POPULAR TRAVEL PERIODS

- January-February '23: 24% (▲ 9%*)
- March-April '23: 32% (▲ 5%*)
- May-June '23: 30% (▼ 14%*)

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 41% (▲ 10%*)
- NON-NEIGHBOURING COUNTRY: 18%
- WITHIN MY COUNTRY: 31% (▼ 13%*)
- OUTSIDE EUROPE: 6%

AND WITH WHOM?

- 38% with family
- 39% with partner
- 9% solo

INTENDED LENGTH OF STAY AND BUDGET

Length of stay	%
Up to 3 nights	20%
4-6 nights	51% (▲ 6%*)
7-9 nights	22% (▼ 4%*)
10-12 nights	5%
Over 12 nights	2%

Budget	%
Up to 500€	19%
501-1.000€	28%
1.001-1.500€	23% (▲ 4%*)
1.501-2.000€	12%
2.001-2.500€	9%
2.501-3.000€	5%
3.001€+	3%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break: 39% (▲ 8%*)
- Culture & Heritage: 18%
- Nature & Outdoors: 10%

TOP 5 EUROPEAN DESTINATIONS**

France	21%	▲ 7%*
Italy	14%	▲ 4%*
Germany	10%	▲ 4%*
Portugal	9%	
UK	6%	

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

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

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

A SNAPSHOT OF POLISH TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	83%	8%	9%
Dec 21	80%	7%	13%

TRAVEL READINESS

Destination not chosen	23% (75%* ▼)
Trip fully booked	14%
Trip partially booked	20% (8%* ▲)
Destination chosen but trip not booked yet	43%

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
21% (9%* ▲)	29% (6%* ▲)	36% (8%* ▼)

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	27% (7%* ▲)
NON-NEIGHBOURING COUNTRY	35% (8%* ▲)
WITHIN MY COUNTRY	25% (11%* ▼)
OUTSIDE EUROPE	9%

AND WITH WHOM?

with family	with partner	solo
42%	38%	7%

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
10%	42% (4%* ▲)	32%	10% (6%* ▼)	6%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
15%	23% (10%* ▼)	20%	18% (6%* ▲)	13%	6%	5%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

City Break	22%
Culture & Heritage	17% (4%* ▲)
Coast & Sea	14%

TOP 5 EUROPEAN DESTINATIONS**

Italy	12% (6%* ▲)
Croatia	11%
Greece	7%
Spain	7%
France	7%

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

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

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

A SNAPSHOT OF AUSTRIAN TRAVEL PLANS

Travel horizon: January-June 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Dec 22	74% ▲17%*	16%	10% ▼18%*
Dec '21	57%	15%	28%

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

TRAVEL READINESS

- Destination not chosen: 22% ▼8%*
- Trip fully booked: 27% ▲9%*
- Trip partially booked: 23%
- Destination chosen but trip not booked yet: 28%

POPULAR TRAVEL PERIODS

January-February '23	March-April '23	May-June '23
31% ▲10%*	27%	28% ▼4%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 35% ▲10%*
- NON-NEIGHBOURING COUNTRY: 26%
- WITHIN MY COUNTRY: 22%
- OUTSIDE EUROPE: 11%

AND WITH WHOM?

- 32% with family ▲6%*
- 36% with partner ▲7%*
- 11% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
32% ▲10%*	34%	20%	8% ▼5%*	6% ▼5%*

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
23%	30%	19% ▲6%*	12%	7%	5%	3% ▼6%*

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break: 28% ▲12%*
- Sun & Beach: 18%
- Wellness & Relaxation: 15%

TOP 5 EUROPEAN DESTINATIONS**

Germany	15% ▲7%*
Italy	9%
Croatia	7%
Greece	7%
Hungary	5%

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

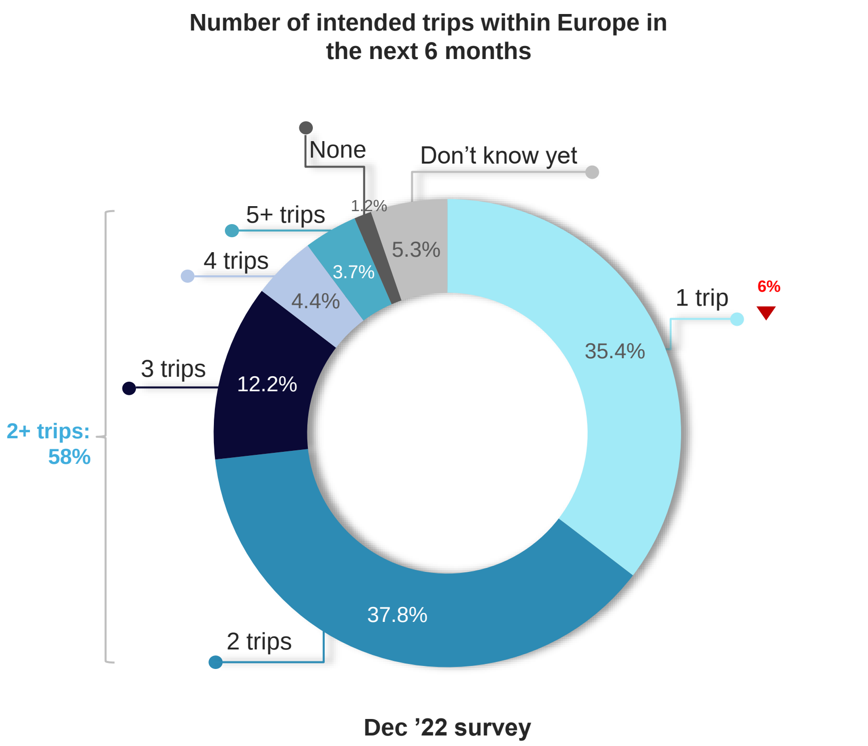
** Based on total sample, without reference to domestic trips

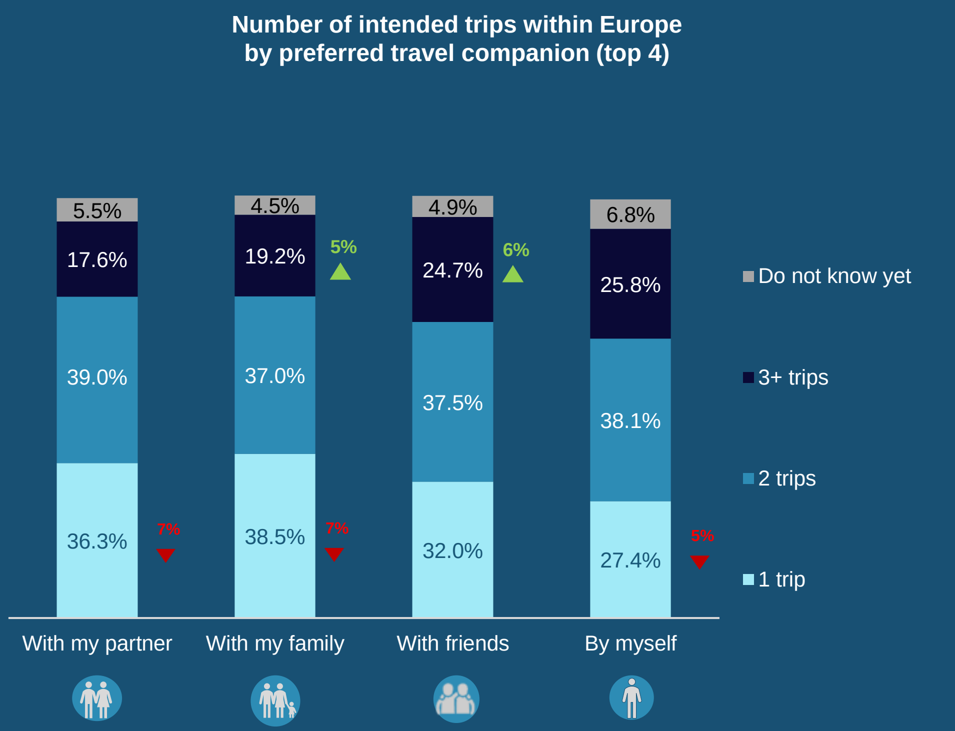
No. of respondents: 501 (total sample of respondents per country)

TRIP PLANNING

02

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





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

Statistically significant difference vs the previous wave 13

*** The question was introduced in May 2022**

No. of respondents: 4,606

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

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

Spain
73.7% ▲ 14%*

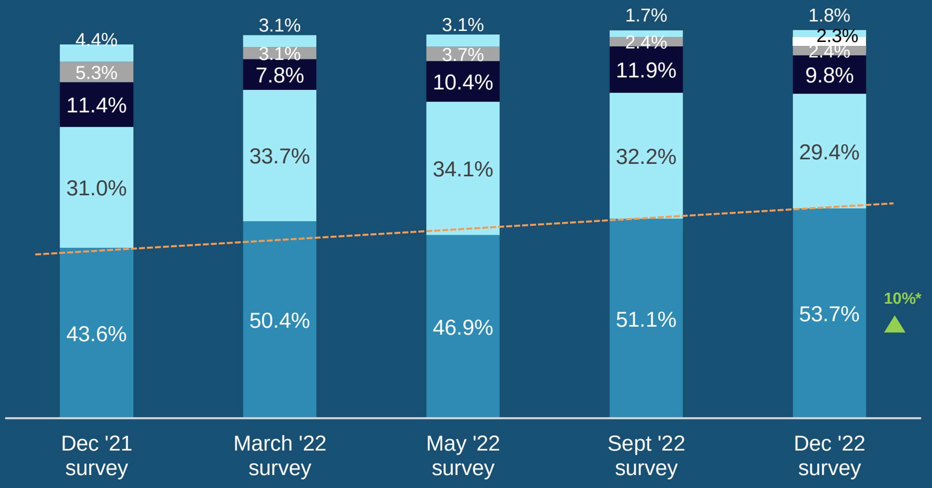
France
61.6% ▲ 11%*

Italy
68.3% ▲ 11%*

Poland
56.3% ▲ 9%*

UK
68.2% ▲ 22%*

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



*Statistically significant difference vs a year ago (December 2021)

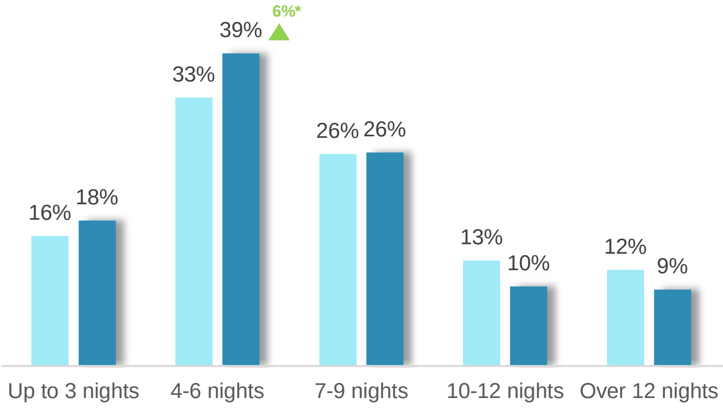
**Up to September '22, 'By train/bus' was recorded as one answer

No. of respondents: 4,606

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

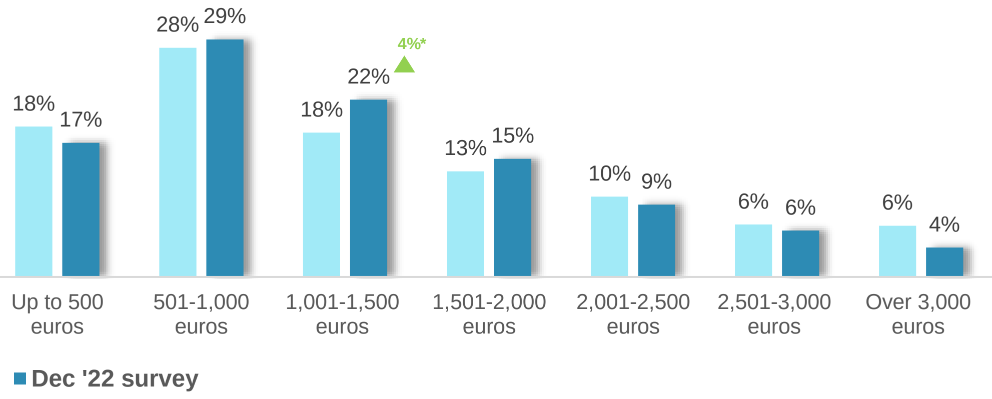
Despite economic concerns, Europeans expect to spend the same time and budget on holidays as last year

Intended length of stay (nights)



Envisaged budget

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



LOOKING FOR THE BIG SPENDERS?

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

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: 4,606

MORE NIGHTS AND HIGHER BUDGETS

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

Budget allocation by trip length

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

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

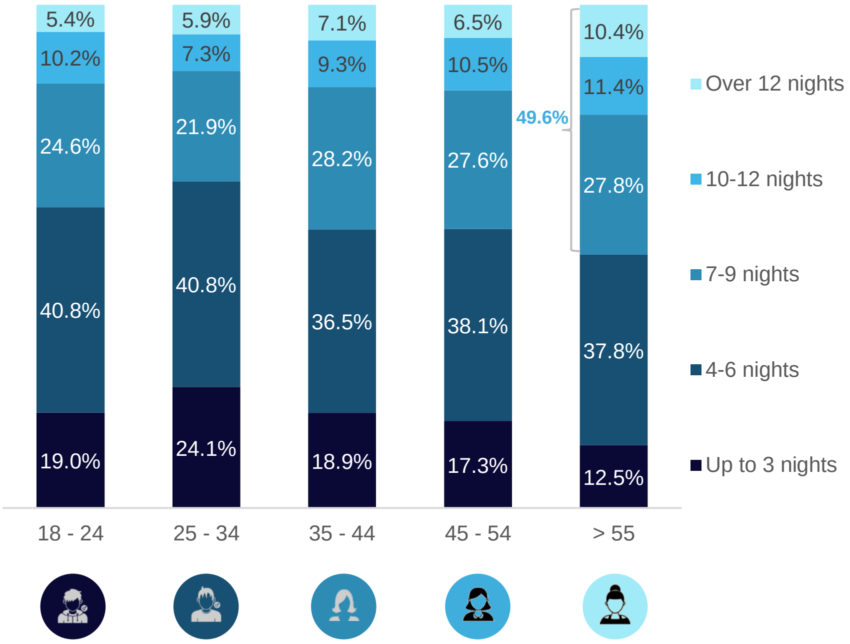
No. of respondents: 4,606

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)?

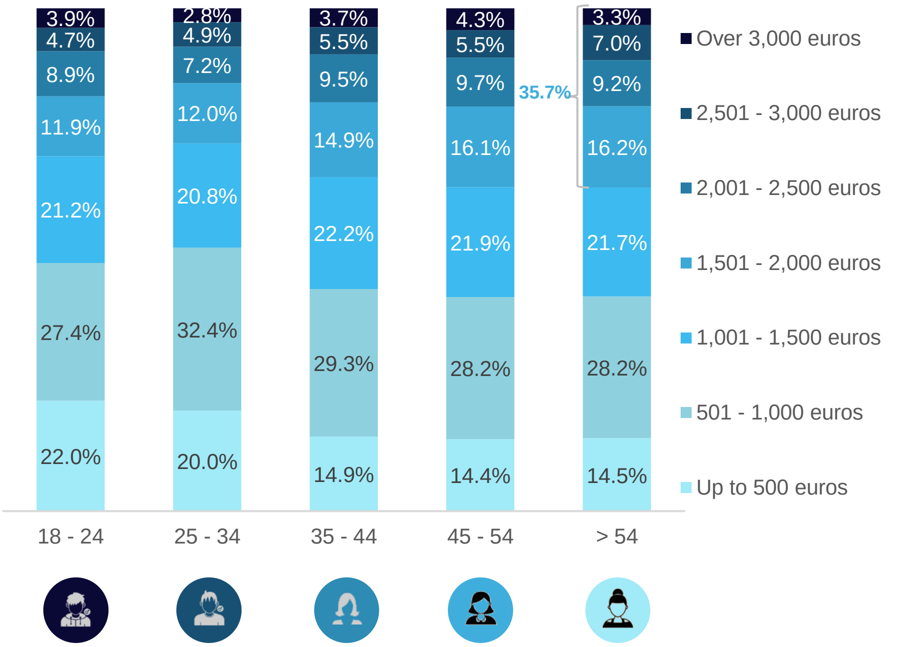
Among age groups, +54 year old Europeans are most likely to take longer holidays and to set aside a budget of over 2,000 euros

Intended length of stay (nights)



Envisaged budget

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

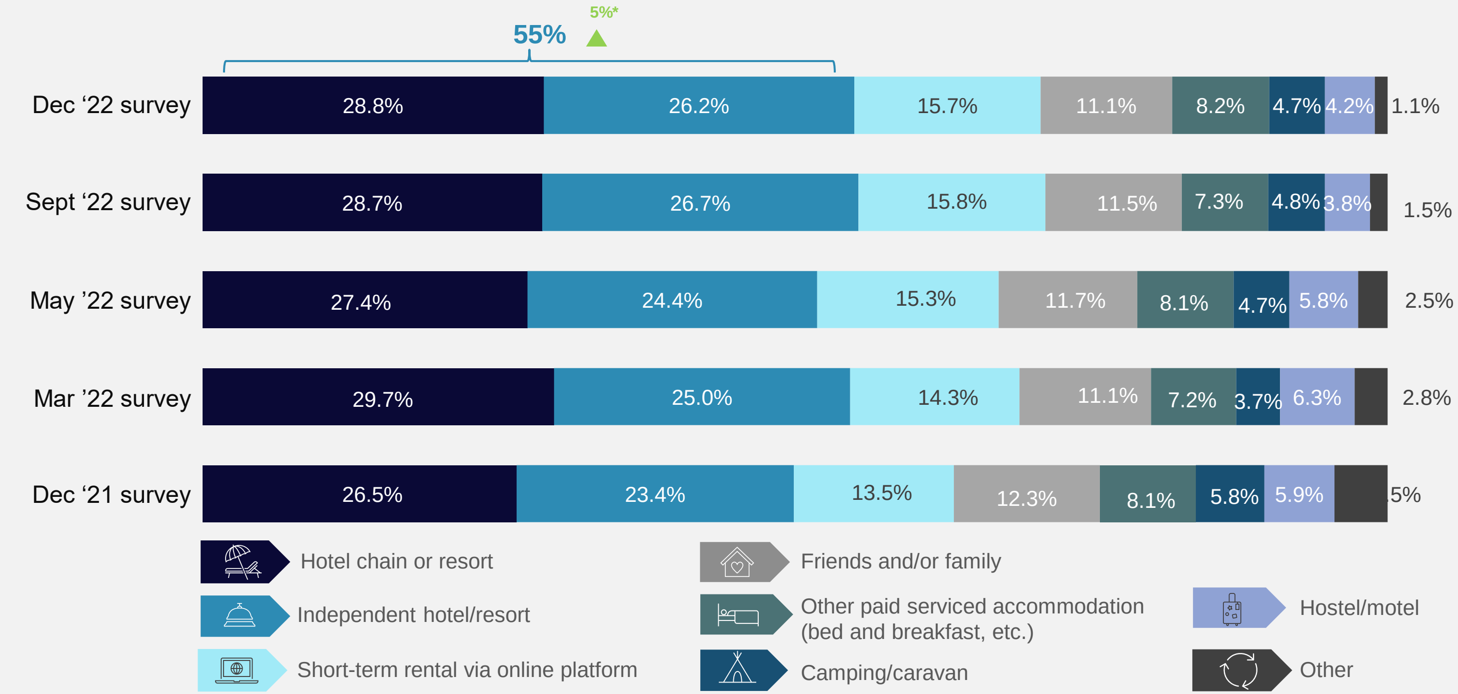


Q18. What would be the length of your next overnight trip?
Q19. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,606

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

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



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

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

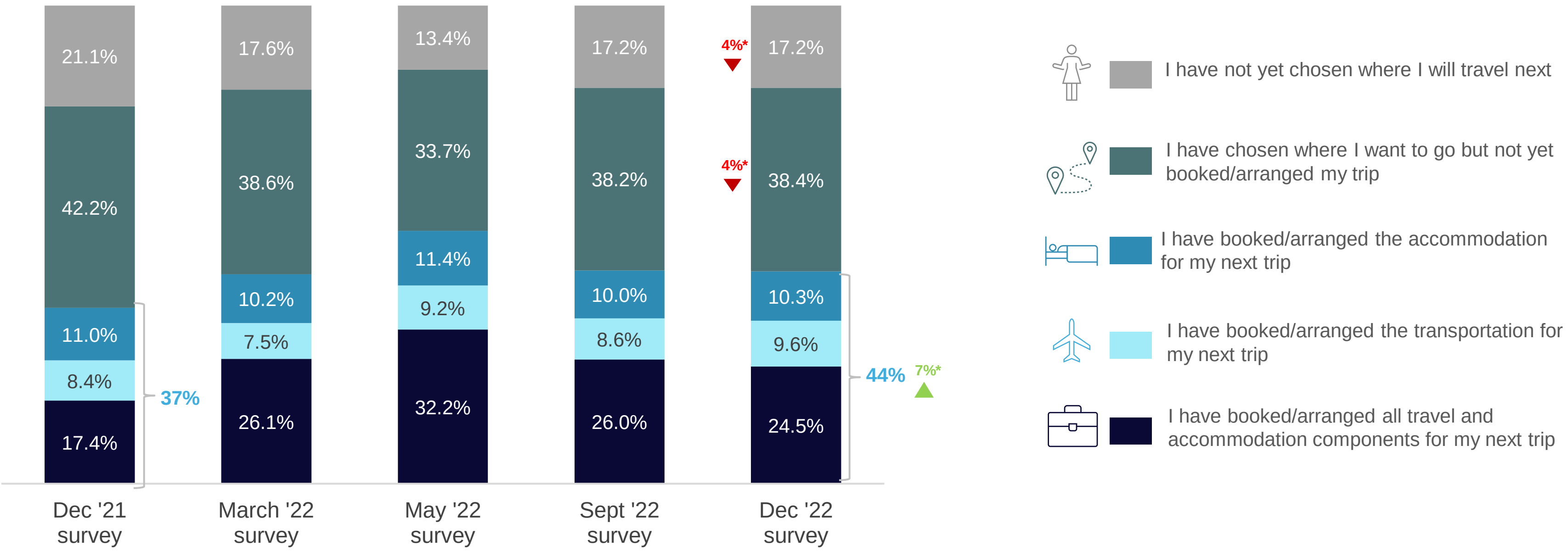
*Statistically significant difference vs a year ago (December 2021)

No. of respondents: 4,606

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

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

Status of planning for the next trip

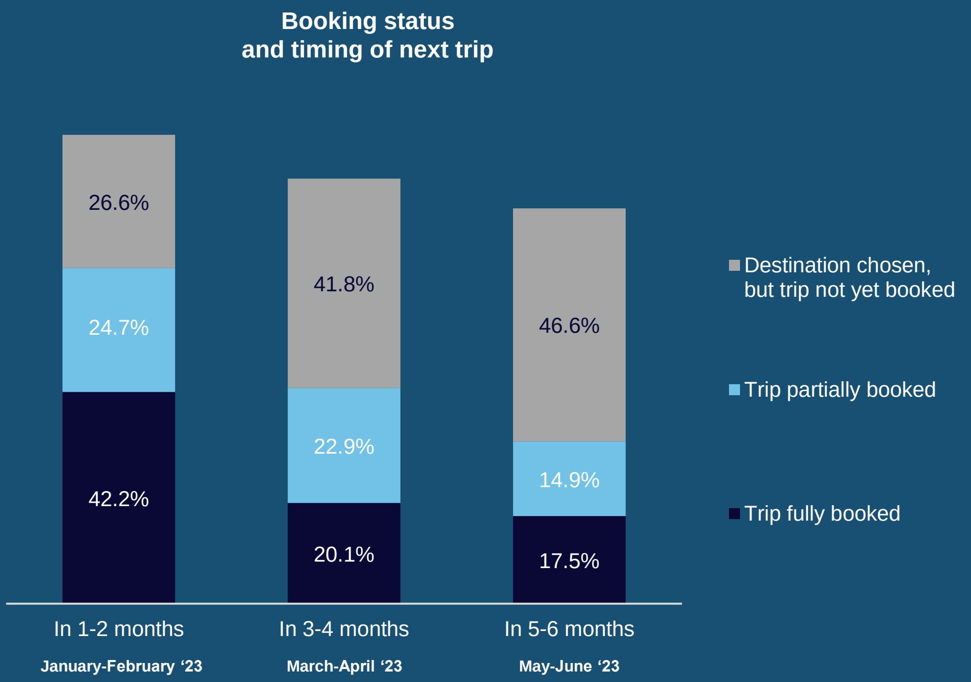


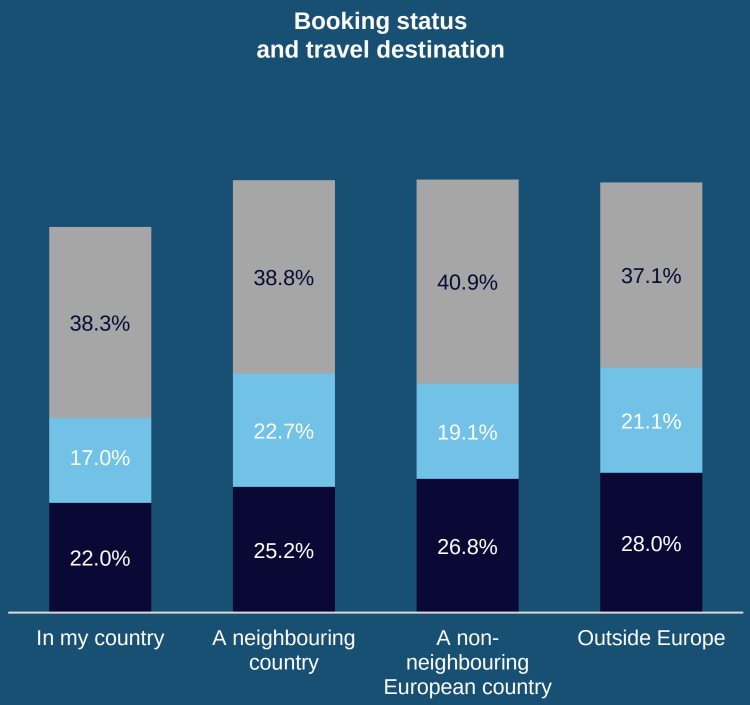
Q21. Please select a response which best describes the planning for your next trip:

* Statistically significant difference vs a year ago (December 2021)

No. of respondents: 4,606

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





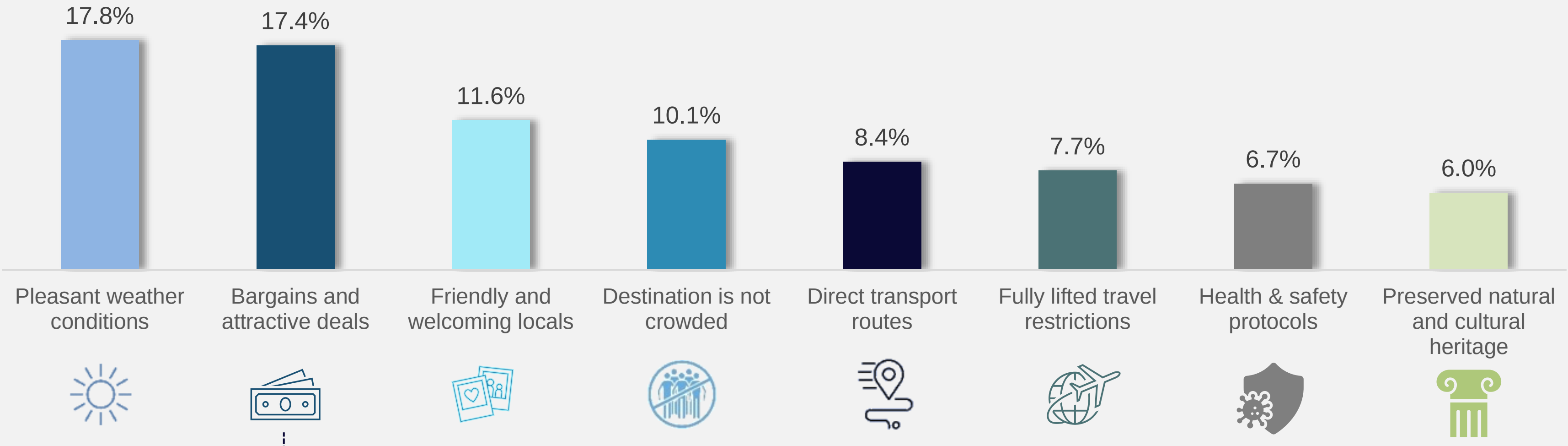
Dec '22 survey

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

No. of respondents: 4,606

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

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



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

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

* The question was introduced in May'22.
Statistically significant differences vs the previous wave 13

No. of respondents: 6,000

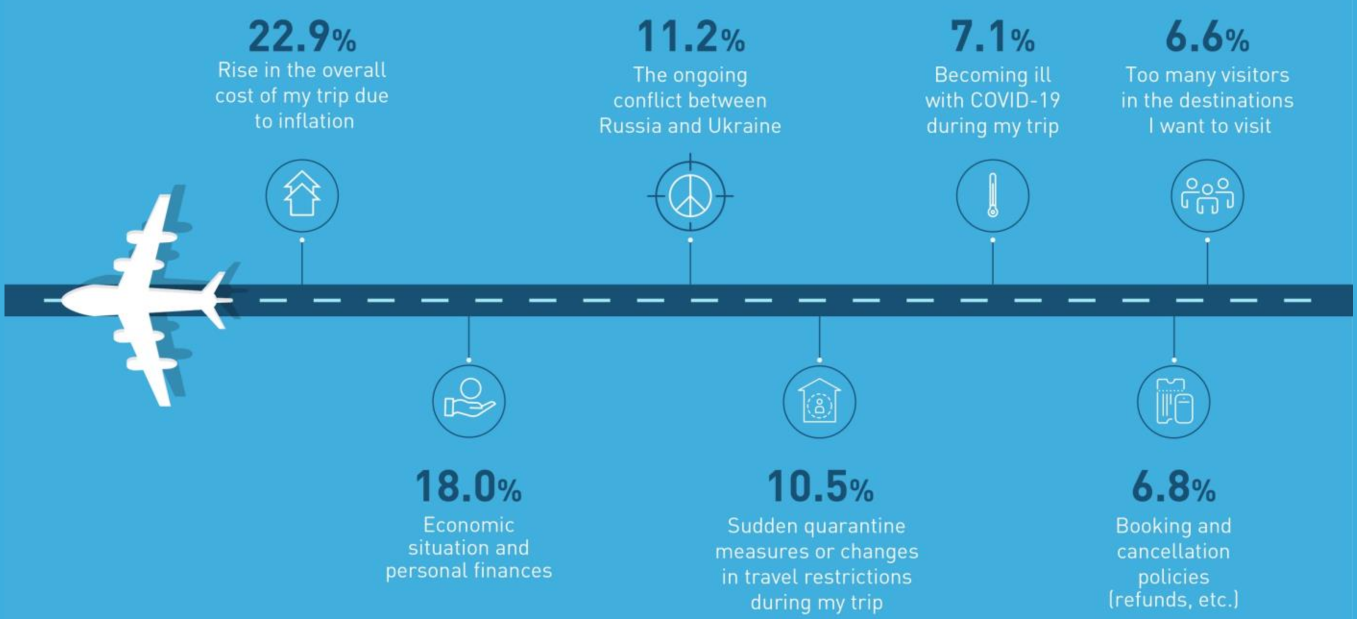
TRAVEL CONCERNS

03

EUROPEAN TRAVELLERS' CONCERNS

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

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



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

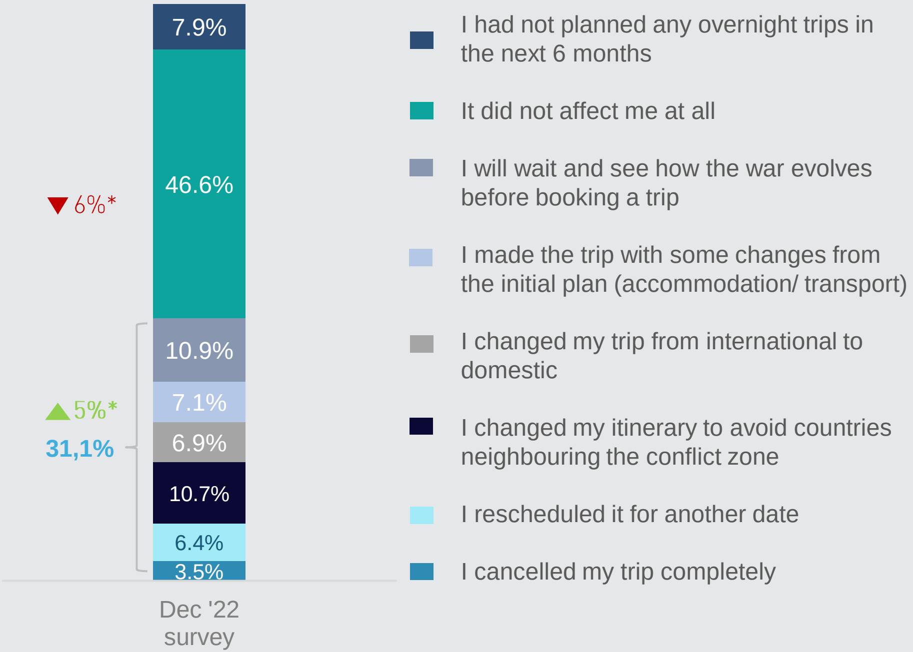
Top travel concerns are shared equally by Europeans of all age groups.

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

No. of respondents: 4,606

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

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



Top 5 markets to change their trip planning

Most often mentioned type of change:

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

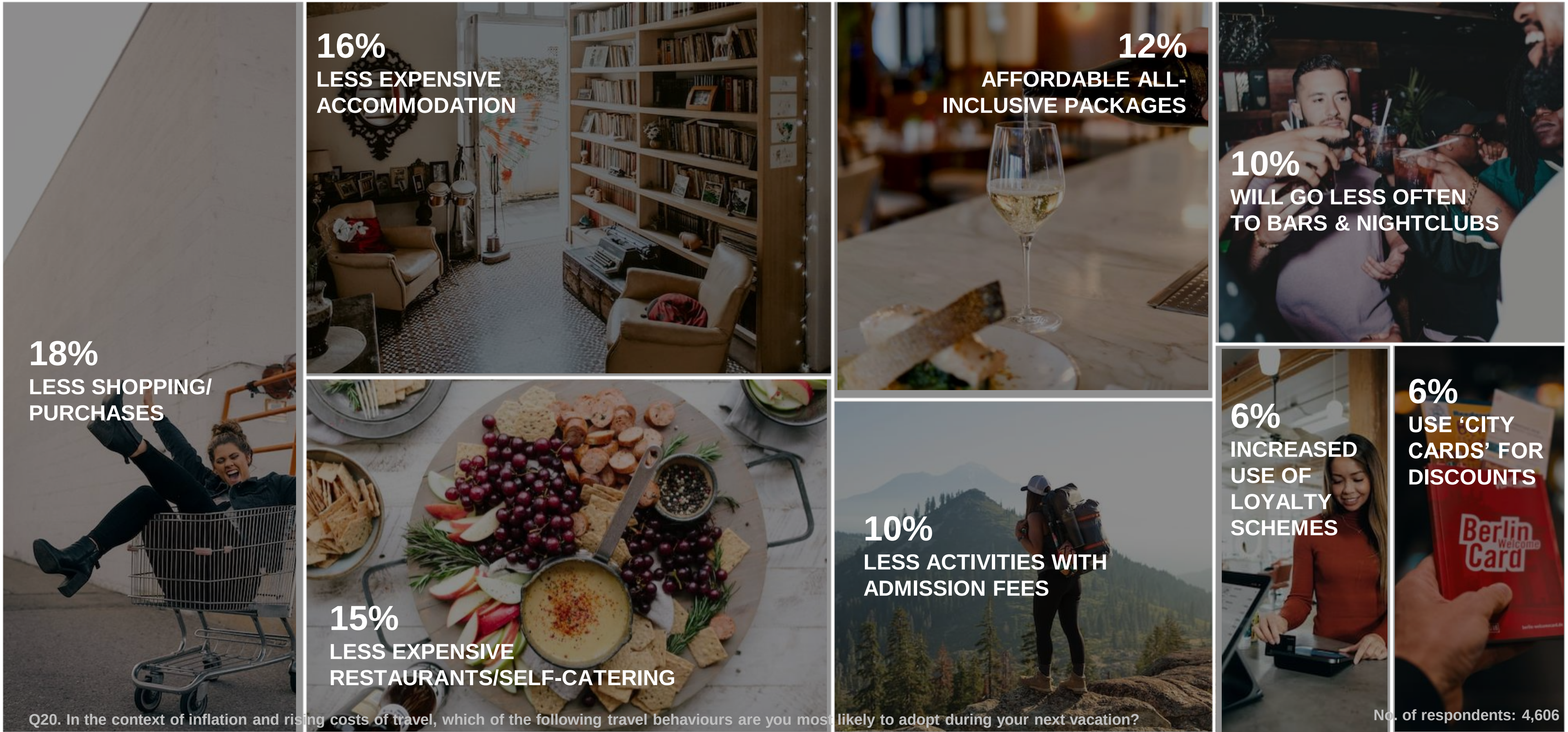
			Most often mentioned type of change
Italy			16%
Poland	▼ 3%*	35.3%	10%
UK	▲ 9%*	34.7%	11%
Switzerland	▲ 5%*	34.7%	12%
Spain		32.1%	13%

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

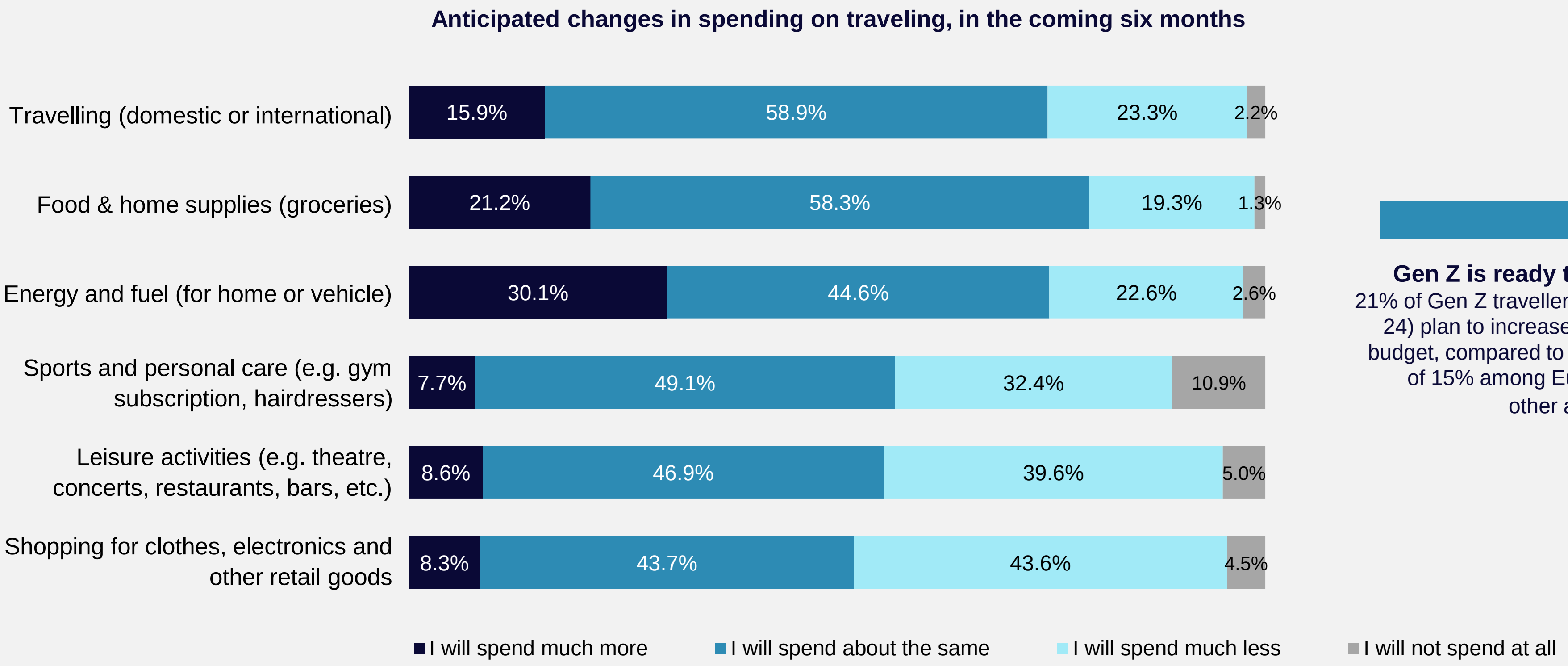
Q3. How has the ongoing war between Russia and Ukraine affected your plans to travel within Europe in the next 6 months?

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

HOW WILL EUROPEANS ADAPT TO THE ECONOMIC CHALLENGES WHILE TRAVELLING?



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



Gen Z is ready to splurge

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

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

* New question, introduced in December 2022

No. of respondents: 6,000

METHODOLOGICAL ANNEX

04

METHODOLOGICAL ANNEX

THE SURVEY

- The report is the result of online market research of Europeans who took at least 2 overnight trips during the last three years (2020-2022)
- Distribution/data collection period:
  - **Wave 10**: 23-31 December 2021; sample = 6,002 / **Wave 11**: 01-09 March 2022; sample = 5,998 / **Wave 12**: 09-12 May 2022; sample = 6,005 / **Wave 13**: 13-23 September 2022; sample = 5,988 / **Wave 14**: 15-29 December 2022; sample = 6,000
  - **Countries**: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - **Languages**: English, French, German, Italian, Spanish, Polish and Dutch
- **Research themes examined**: Travel personas (1 question), Travel concerns and impact of external shocks on travel (8 questions), and Travel intentions, preferences and trip planning (13 questions)
- 46% of the Wave 13 survey respondents are male and 54% are female. Sample size and age groups are listed below:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	70	44	100	96	92	56	120	62	99	827
	25 - 34	136	112	73	133	128	152	106	103	119	147	1,209
	35 - 44	126	134	103	1114	140	150	120	105	130	128	1,250
	45 - 54	138	168	105	87	146	168	92	91	111	74	1,180
	≥55	262	266	175	66	240	188	126	81	78	52	1,534
Total		**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**500**	**500**	**6,000**

Study on Monitoring Sentiment for Intra-European Travel

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

Photo ID: 2173930499

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