MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

TRAVEL HORIZON: JUNE - NOVEMBER 2023

EUROPEAN TRAVEL COMMISSION

Co-funded by the European Union

WAVE 16 RESEARCH HIGHLIGHTS

Europeans want to travel, but less than a year ago

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

- **69% of Europeans plan to travel between June and November 2023, a slight decrease of 4% compared to last year.** Europeans aged 25-44 are the most eager to travel (71%), while Gen Z – aged 18-24– are the most hesitant (63%).
- Among Europeans with travel plans, the majority (77%) intend to take a trip **between June-September**. **Visiting a non-neighbouring European country emerges as the top preference**, capturing 29% of interest, the highest level since August 2020.
- Non-leisure travel grows in popularity: **interest in business travel** and **event trips both increased by 4%** over 2022.
- Europeans' most desired types of leisure trips for this summer and autumn are **Sun & Beach holidays (18%), Culture & Heritage getaways (16%) and City Beaks (14%).**

[1]The data collection and research methodology are detailed in the methodological annex (slide 43)

WAVE 16 RESEARCH HIGHLIGHTS

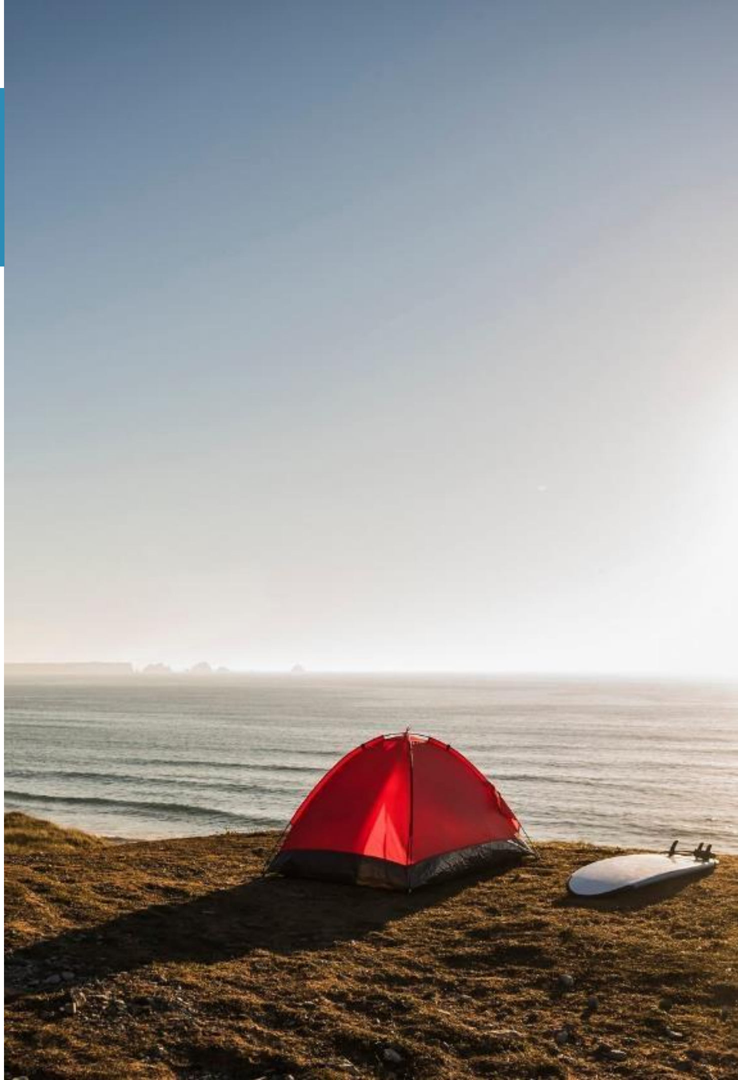
The share of travellers intending to use public transport reaches an all time high

- **60% of European travellers plan to take at least two trips** this summer and autumn, while a considerable **12% intend to head for four or more trips** (an increase of 5% compared to a year ago).
- Similar to 2022, the intended lengths of stay at the destination remain 4-6 nights (36%), and 7-9 nights (27%), while **the intended budget has increased by 8% compared to a year ago:** 41% of travellers plan to spend more than 1,500 euros.
- The share of Europeans who intend to travel by **train or bus** has reached an **all-time high of 16%.** Yet, taking a flight remains the most popular option for **48%** of respondents, while driving a personal car appeals to **25**% of people with travel plans (down by 10% compared to a year ago).
- For the first time, preference for hotel accommodation drops below the 50% threshold (currently 49%), while **interest in short-term rentals peaks to 17%.**
- **56% of Europeans have already fully or partially booked their upcoming trip** - a 4% rise compared to the same period last year.
- **Pleasant weather (17%), attractive deals (17%) and welcoming locals (12%)** remain Europeans' top criteria for choosing a travel destination.

WAVE 16 RESEARCH HIGHLIGHTS

Financial worries still impact travel decisions

- **High travel prices** and **personal finances are consolidated as the primary travel concerns** for Europeans, with respective increases of 6% and 4% compared to the same period in 2022.
- Responding to the ongoing financial challenges, **17% of Europeans will consider off-season travel, 14% will opt for destinations they perceive as more affordable,** and **14% will book activities well in advance**.
- During their next trip, **17% of Europeans plan to cut down on shopping, 15% will opt for less-expensive accommodation establishments,** while **15% will select less-expensive restaurants or settle for self-catering.**
- While concerns regarding the war between Russia and Ukraine slightly drop (decreasing by 3%), its impact on Europeans' travel-related decisions has increased by 9%, **affecting 44% of travellers**.



WAVE 16 RESEARCH HIGHLIGHTS
RECOMMENDATIONS FOR DESTINATIONS

- To leverage the growing interest in travelling for events, which is particularly appealing among 18–24-year-old Europeans, destinations could **organise small-to-medium pop-up events and festivals aimed at young people.** This could further enhance their interest to travel after the summer season.
- Now is also a good time for destinations to proactively **design and organize larger-scale events for late autumn** plus **sponsor already-planned events for the same period**, to boost awareness in such events.
- As the interest in short-term rentals continues to increase, destinations should put efforts to **responsibly manage this growing trend** and **its social and economic implications** for the host communities. Potential measures may include requiring licensing, applying tourism tax, or limiting the number of days a property could be rented.
- European tourism returns to full capacity, and so do Europeans' concerns about over-crowded destinations. This is a prime **opportunity for lesser-known destinations to promote themselves**, through, for instance, **cooperation with highly-popular destinations** that want to better manage their tourism flows.
- Travellers' interest in using public transportation peaks for City Breaks (27%), Culture & Heritage trips (26%) and Sun & Beach holidays (25%). Destinations offering such kind of trips are recommended to **highlight their accessibility by rail and bus.** Besides, they can **create holiday packages that include a transportation ticket**.

WAVE 16

RECOMMENDATIONS FOR BUSINESSES

- The increasing travel costs and the economic situation are prime concerns in the coming summer and autumn. **Special bargains, early-booking deals and price promotion offerings (such as ‘travel now and pay later’)** are now an essential element in winning the hearts - and pockets - of European travellers.
- As the share of Europeans who prefer to book their next trip in advance (in full or at least one out of transportation or accommodation) surges by 4% compared to a year ago, businesses can **promote early-bird packages for October-November, offering a ‘life jacket’ against cost increases**.
- Europeans’ top experiences include tasting the local cuisine (16%), diving into the local life (15%) and learning about history and culture (13%). Tour companies are therefore encouraged to **promote going beyond the ordinary and offer unique, immersive experiences.** Some examples could be joining meal preparation hosted by a local family, art workshops with local craftsmen, or family-oriented agritourism activities in a local farm.
- In response to the slight decrease in the preference for hotel stays, **hotels should focus on targeting segments which are most likely to opt for this type of stay;** these include Europeans travelling with their partner (52%) or family (49%) and who are taking a Sun & Beach holiday (56%) or a City Break (54%).

CONTENTS

Reading the data

Wave 16

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

	Wave 12	Wave 13	Wave 14	Wave 15	Wave 16
Survey dates	9-12 May '22	13-23 Sept '22	15-29 Dec '22	1-7 March '23	8 May-4 June '23*

2. To present Wave 16 timings in which respondents are 'most likely to take their next trip', the following time periods should be used as a reference:
   - In 1-2 months: June - July 2023
   - In 3-4 months: August - September 2023
   - In 5-6 months: October - November 2023
3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents: 6,002
   - Respondents most likely to travel in the next 6 months: 4,165
   - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,967
4. Significant changes between current and previous waves are calculated on a 2.5% significance level. Statistically significant differences are marked using the following symbols:
   - Increasing ▲, decreasing ▼
   - Numbers next to the arrows reflect the actual change in the share of respondents selecting a specific response between current and previous waves

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

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

TRAVEL PLANS

01

69% of Europeans plan to travel between June and November 2023, a slight decrease of 4% compared to 2022

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

France
80.0%
7%* ▲

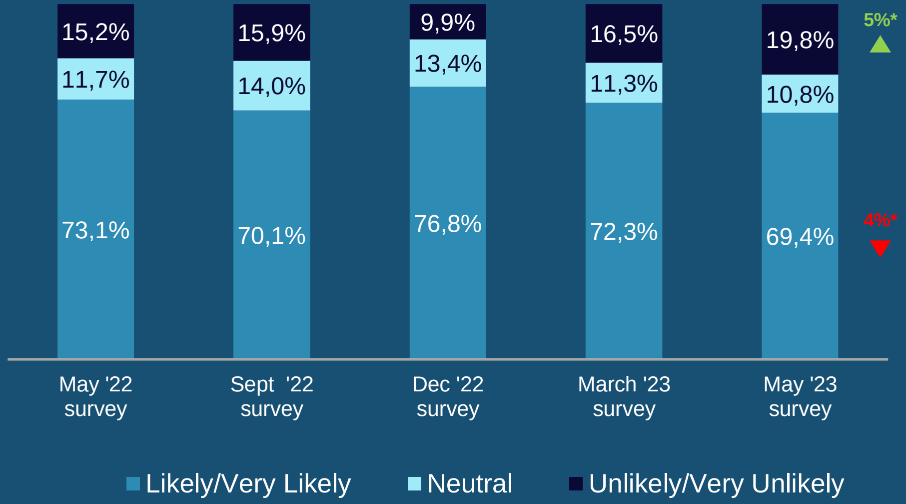
Poland
74.2%
13%* ▼

Belgium
79.1%
6%* ▲

Netherlands
73.4%
4%* ▼

UK
74.9%
7%* ▲

Intention to travel in the next six months

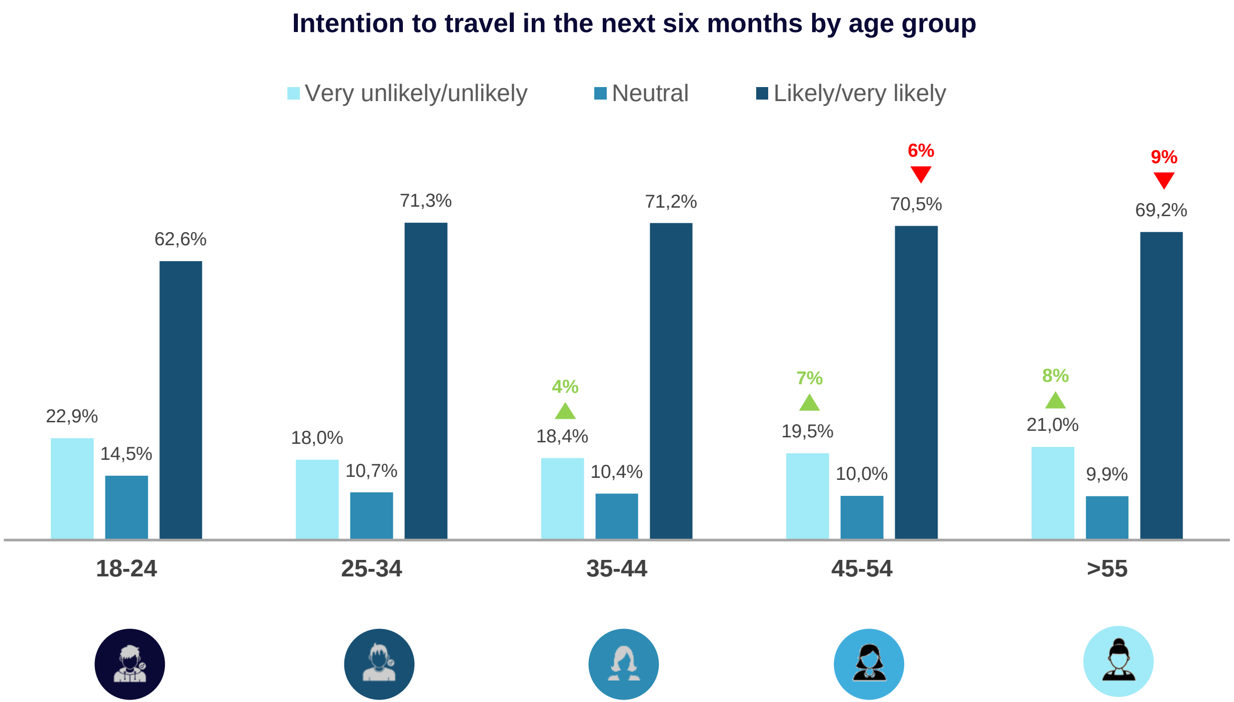


*Statistically significant difference vs a year ago (May 2022)

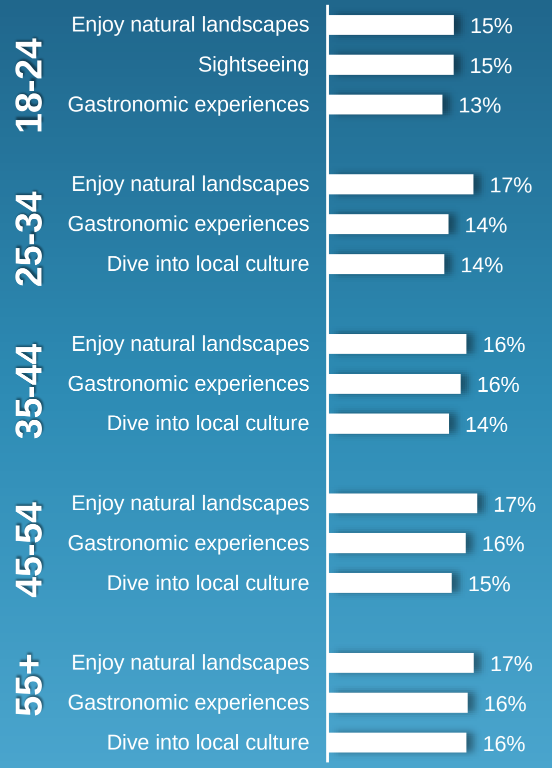
No. of respondents: 6,002

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

Europeans over the age of 25 share a high sentiment for travelling, despite a drop in intentions among travellers over the age of 45



TOP TRAVEL EXPERIENCES BY AGE GROUP:



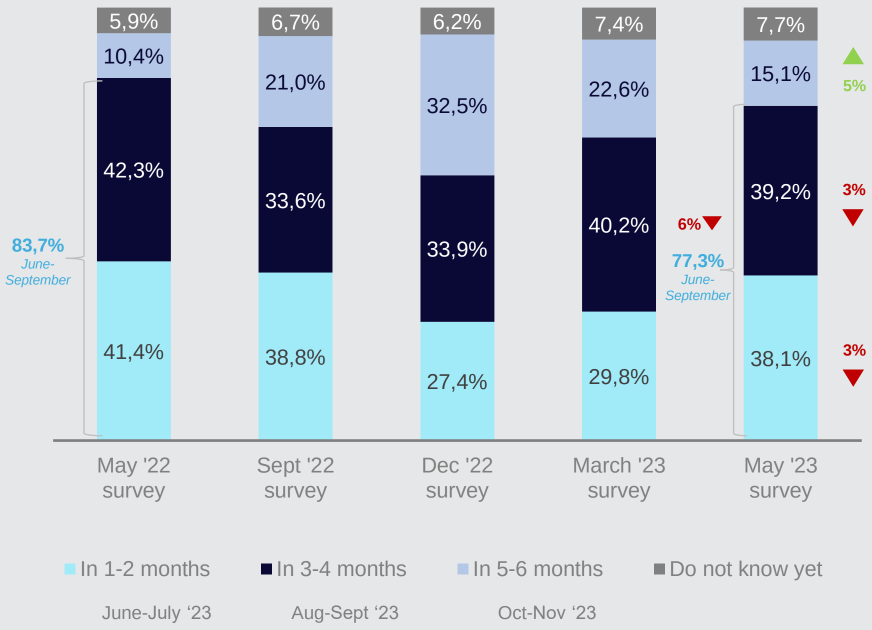
Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?
Q6. What criteria will play the most important role in choosing your next holiday destination?

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

No. of respondents: 6,002

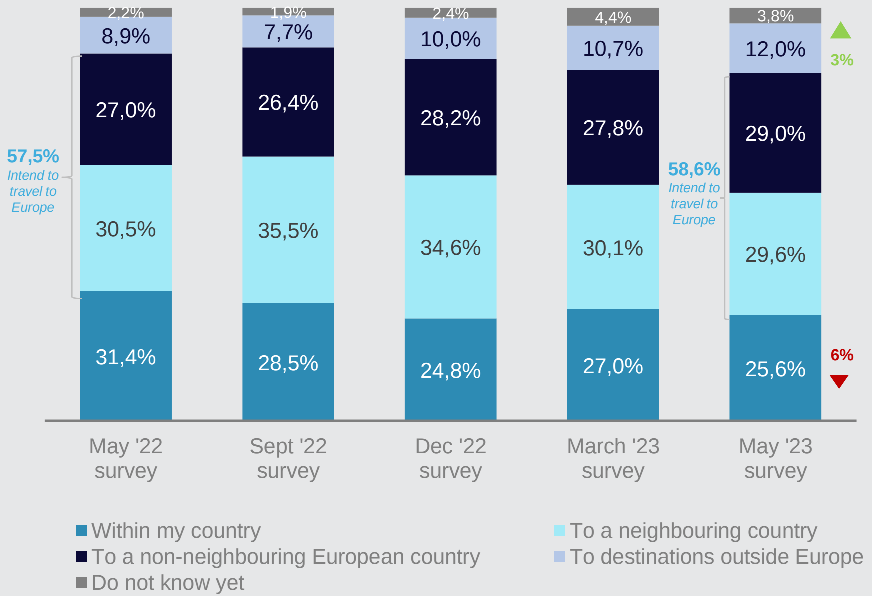
77% of European travellers plan to take a trip during June-September
With interest in visiting a non-neighbouring country reaching the highest level (29%) since May 2022

When will Europeans travel next?



Q10. 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?



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

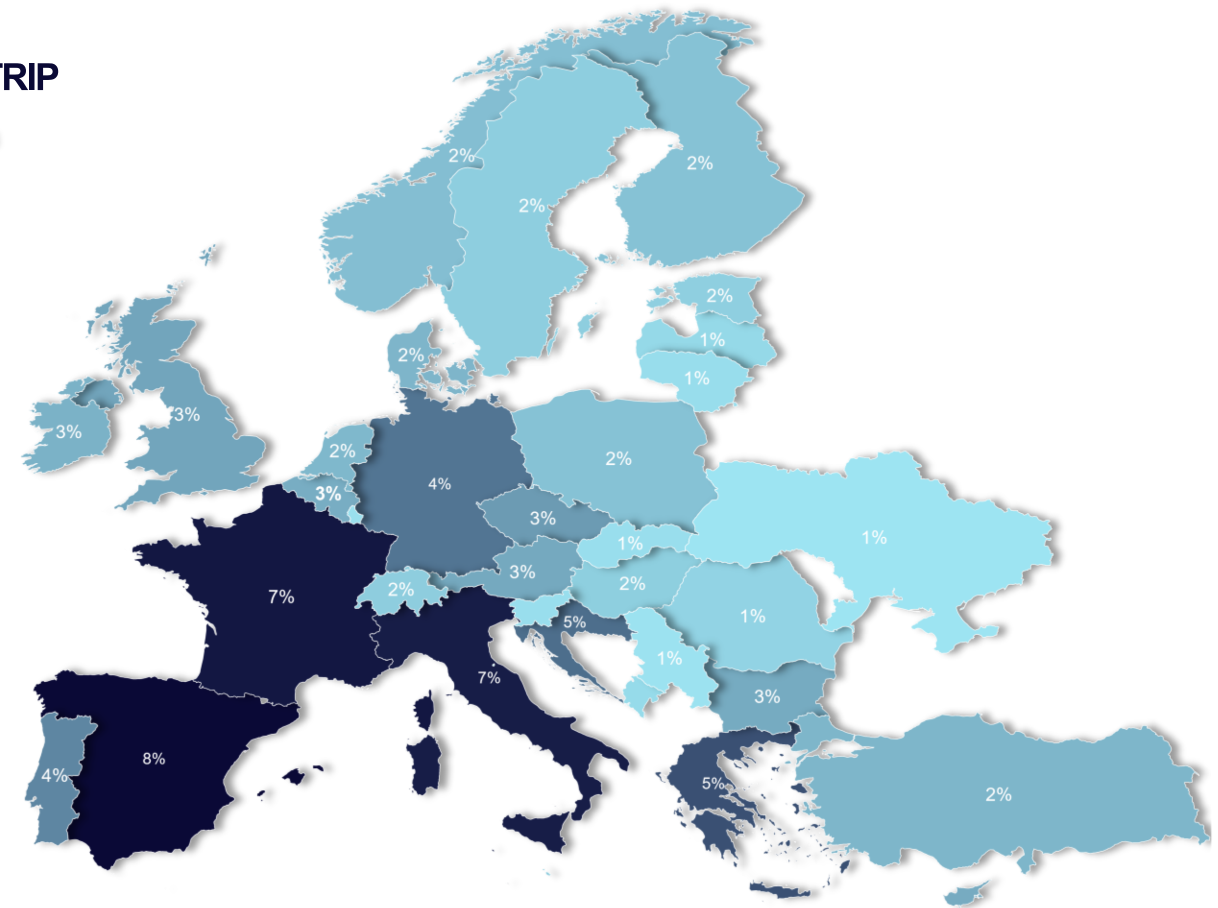
* Statistically significant difference vs a year ago (May 2022)

No. of respondents: 4,165

PREFERRED COUNTRIES FOR EUROPEANS' NEXT INTERNATIONAL TRIP

TOP 10 COUNTRIES

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



*Please use this map as a reference only

No. of respondents: 4,967

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

While leisure remains a primary motive for travel this summer, business travel (9%) and events trips (10%) gain popularity

Top 3 markets to take a leisure trip

France
76.6%

Belgium
78.5%

UK
75.1%

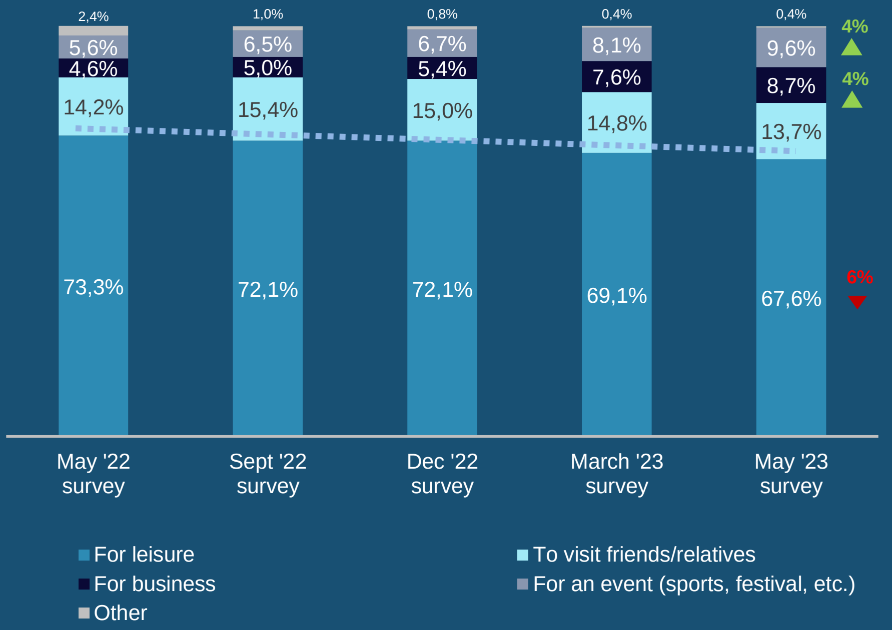
Top 3 markets to take a business trip

Austria
20.0%
13% ▲

Switzerland
18.7%
6% ▲

Netherlands
10.8%
6%

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



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

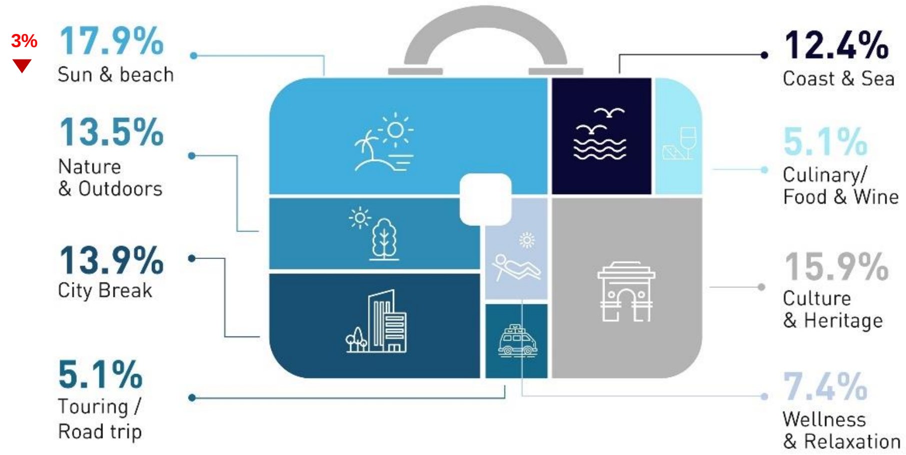
No. of respondents: 4,165

Q9. 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

European summer escapes: unveiling the everlasting appeal of sun, beach, and cultural delights

Preferred type of leisure trip in the next six months



Preferred type of experiences in the next six months

Q16. What type of leisure trip within Europe are you most likely to undertake next?
Q6. Which of the following travel experiences will you look for during your next trip to Europe?

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

No. of respondents: 4,165

EUROPEANS' MOST IN-DEMAND TRIP TYPES AND EXPERIENCES

Travel horizon: June-November 2023

	Sun & Beach	Culture & Heritage	City Break	Nature & Outdoors
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	**23%** >55 **22%** 45-54	**30%** >55 **24%** 45-54	**25%** 25-34 **23%** >55	**27%** >55 **23%** 35-44
MOST COMMON LENGTH OF STAY & BUDGET	**34%** 7-9 nights **29%** 500-1000 € **27%** 4-6 nights **20%** 1001-1500 €	**45%** 4-6 nights **29%** 500-1000 € **25%** 7-9 nights **18%** 1001-1500 €	**45%** 4-6 nights **29%** 500-1000 € **25%** Up to 3 nights **21%** 1001-1500 €	**37%** 4-6 nights **26%** 500-1000 € **25%** 7-9 nights **19%** 1001-1500 €
TOP 4 EXPERIENCES TO TRY	**18%** Enjoy natural landscapes **17%** Gastronomic experiences **15%** Dive into local culture **13%** Sightseeing	**22%** Learn about history **17%** Dive into local culture **16%** Sightseeing **16%** Gastronomic experiences	**19%** Sightseeing **18%** Dive into local culture **17%** Gastronomic experiences **14%** Learn about history	**25%** Enjoy natural landscapes **15%** Dive into local culture **15%** Gastronomic experiences **13%** Learn about history

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

No. of respondents: 4,165

SNAPSHOT: AUSTRIAN TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	45% ▼20%*	19% ▲7%*	35% ▲13%*
May '22	65%	13%	22%

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

TRAVEL READINESS

- Destination not chosen: 23% ▲6%*
- Trip fully booked: 16% ▼15%*
- Destination chosen but trip not booked yet: 21% ▼4%*
- **Trip partially booked**: 40% ▲13%*

POPULAR TRAVEL PERIODS

June-July '23	August-September '23	October-November'23
26% ▼15%*	24% ▼13%*	23% ▲13%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 21% ▼10%*
- NON-NEIGHBOURING COUNTRY: 22% ▼4%*
- WITHIN MY COUNTRY: 21% ▼5%*
- OUTSIDE EUROPE: 21% ▲11%*

TRAVELLING WITH?

- 22% with family ▼8%*
- 15% solo ▲4%*
- 14% with partner 15%*

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
20%	23% ▼13%*	18%	20% ▲8%*	19% ▲9%*

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
14% ▼5%*	17% ▼12%*	12% ▼6%*	13%	14% ▲5%*	16% ▲9%*	14% ▲8%*

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach **12%** ▼9%*
- City Break **11%**
- Nature & Outdoors **10%** ▼6%*

TOP 5 EUROPEAN DESTINATIONS**

Italy	5%	▼8%*
Germany	4%	▼4%*
Croatia	4%	▼4%*
Norway	4%	
Serbia	3%	

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

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

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

SNAPSHOT: BELGIAN TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	79% ▲ 6%*	10% ▼ 3%*	11% ▼ 3%*
May 22	73%	13%	14%

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

TRAVEL READINESS

- Destination not chosen: 16%
- Trip fully booked: 35%
- Trip partially booked: 23% ▼ 8%*
- Destination chosen but trip not booked yet: 26% ▲ 5%*

POPULAR TRAVEL PERIODS

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

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 36%
- NON-NEIGHBOURING COUNTRY: 32%
- WITHIN MY COUNTRY: 16%
- OUTSIDE EUROPE: 11%

TRAVELLING WITH?

- 38% with family ▼ 5%*
- 35% with partner ▲ 3%*
- 14% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
16%	34% ▲ 7%*	25%	12% ▼ 4%*	13%

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%	26%	19%	15%	13% ▲ 4%*	6%	4%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Nature & Outdoors: 20%
- Sun & Beach: 18% ▼ 4%*
- City Break: 13%

TOP 5 EUROPEAN DESTINATIONS**

France	20%	▼ 4%*
Spain	10%	
Italy	9%	
Greece	5%	
Netherlands	5%	

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

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

No. of respondents: 502 (total sample of respondents per country)

SNAPSHOT: BRITISH TRAVEL PLANS

Travel Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	75% ▲ 7%*	9%	16% ▼ 6*
May 22	68%	14%	18%

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

TRAVEL READINESS

- Trip fully booked: **31%**
- Trip partially booked: 23%
- Destination chosen but trip not booked yet: 24% ▲ 4%*
- Destination not chosen: 22%

POPULAR TRAVEL PERIODS

June-July '23	August-September '23	October-November'23
31%	**37%** ▲ 4%*	17%

TRAVEL PLANNING

WHERE TO?

- ANOTHER EUROPEAN COUNTRY: 53%
- WITHIN MY COUNTRY: 29% ▼ 4%*
- OUTSIDE EUROPE: 13%

TRAVELLING WITH?

- **40%** with family
- 33% with partner
- 11% solo

INTENDED LENGTH OF STAY AND BUDGET

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

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%	30% ▼ 4%*	23% ▲ 6%*	12%	6%	4%	5%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach **31%**
- City Break **18%**
- Coast & Sea **12%**

TOP 5 EUROPEAN DESTINATIONS**

Spain	16%
France	9%
Italy	8%
Greece	7%
Germany	5%

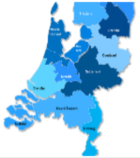
* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

SNAPSHOT: DUTCH TRAVEL PLANS

Travel horizon: June-November 2023



TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May ;23	73% ▼ 4%*	9% ▼ 4%*	17% ▲ 8%*
May 22	78%	13%	9%

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

TRAVEL READINESS

- Trip fully booked: 32% (▼ 3%*)
- Trip partially booked: 30% (▲ 10%*)
- Destination chosen but trip not booked yet: 23% (▼ 4%*)
- Destination not chosen: 15%

POPULAR TRAVEL PERIODS

June-July '23	August-September '23	October-November'23
33%	38% ▼ 5%*	20% ▲ 8%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 23% ▲ 4%*
- NON-NEIGHBOURING COUNTRY: 39% ▼ 5%*
- WITHIN MY COUNTRY: 19%
- OUTSIDE EUROPE: 16%

TRAVELLING WITH?

- 36% with partner
- 26% with family ▼ 14%*
- 12% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
14%	27%	28% ▲ 4%*	16%	15%

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%	21% ▼ 8%*	19%	16%	15% ▲ 6%*	12% ▲ 7%*	6%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Nature & Outdoors: 19%
- City Break: 15%
- Sun & Beach: 15% ▼ 12%*

TOP 5 EUROPEAN DESTINATIONS**

France	8%	▼ 4%*
Spain	7%	▼ 6%*
Italy	6%	
Germany	6%	
Greece	5%	

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

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

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

SNAPSHOT: FRENCH TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	80% ▲ 7%*	6% ▼ 4%*	14% ▼ 3%*
May '22	73%	10%	17%

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

TRAVEL READINESS

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

POPULAR TRAVEL PERIODS

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

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 34%
- NON-NEIGHBOURING COUNTRY: 18% ▲ 4%*
- WITHIN MY COUNTRY: 32% ▼ 5%*
- OUTSIDE EUROPE: 12%

TRAVELLING WITH?

- 44% with partner ▲ 7%*
- 36% with family
- 8% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
11% ▼ 3%*	36% ▲ 4%*	29%	13%	11%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
16%	29%	20%	16%	8%	6%	5%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

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

TOP 5 EUROPEAN DESTINATIONS**

Italy	12%
Spain	10%
Greece	9%
Portugal	8%
Croatia	6%

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

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

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

SNAPSHOT: GERMAN TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	62% ▼15%*	14%	24% ▲12%*
May 22	77%	11%	12%

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

TRAVEL READINESS

Destination not chosen	16% ▲6%*
Trip fully booked	27% ▼13%*
Trip partially booked	35% ▲12%*
Destination chosen but trip not booked yet	22% ▼5%*

POPULAR TRAVEL PERIODS

June-July '23	August-September '23	October-November'23
37% ▼11%	31% ▼4%	20% ▲9%*

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	28% ▲3%*
NON-NEIGHBOURING COUNTRY	28%
WITHIN MY COUNTRY	23% ▼9%*
OUTSIDE EUROPE	14% ▲4%*

TRAVELLING WITH?

with family	with partner	solo
29% ▼16%*	25% ▼8%*	15% ▲5%*

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
15%	30%	24% ▼3%*	16%	15%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
14% ▼6%*	23% ▼10%*	17%	19% ▲6%*	13% ▲5%*	7%	8% ▲5%*

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Nature & Outdoors	18%
Sun & Beach	14% ▼15%*
Coast & Sea	13% ▼5%*

TOP 5 EUROPEAN DESTINATIONS**

Italy	6%	▼5%*
Czech Republic	6%	
Spain	5%	▼4%*
Cyprus	5%	
Austria	4%	▼5%*

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

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

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

SNAPSHOT: ITALIAN TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	72% ▼ 6%*	12%	17% ▲ 4%*
May '22	77%	10%	13%

TRAVEL READINESS

- Trip fully booked: 26%
- Trip partially booked: 24% ▲ 8%*
- Destination chosen but trip not booked yet: 30%
- Destination not chosen: 20%
- 10%* ▼

POPULAR TRAVEL PERIODS

June-July '23	August-September '23	October-November'23
35%	38% ▼ 6%*	15% ▲ 4%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 24%
- NON-NEIGHBOURING COUNTRY: 28% ▲ 5%*
- WITHIN MY COUNTRY: 32% ▼ 13%*
- OUTSIDE EUROPE: 10% ▲ 4%*

TRAVELLING WITH?

- 37% with partner
- 29% with family ▼ 9%*
- 9% solo ▼ 4%*

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
17%	40% ▼ 6%*	24%	10%	9%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
16%	27%	17% ▼ 5%*	12%	12%	9% ▲ 4%*	7% ▲ 5%*

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Culture & Heritage 29%
- Sun & Beach 15%
- Coast & Sea 13%

TOP 5 EUROPEAN DESTINATIONS**

Spain	12%	▼ 3%*
France	11%	▼ 5%*
Greece	7%	
Germany	6%	
Austria	5%	

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

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

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

SNAPSHOT: POLISH TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	74% ▼13%*	8% ▲4%*	18% ▲8%*
May '22	87%	4%	10%

TRAVEL READINESS

- Trip fully booked: 19%
- Trip partially booked: 31% ▲9%*
- Destination chosen but trip not booked yet: 34% ▼6%*
- Destination not chosen: 16%

POPULAR TRAVEL PERIODS

- June-July '23: 43%
- August-September '23: 32% ▼11%*
- October-November'23: 14% ▲8%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 24%
- NON-NEIGHBOURING COUNTRY: 31%
- WITHIN MY COUNTRY: 24% ▼10%*
- OUTSIDE EUROPE: 15% ▲9%*

TRAVELLING WITH?

- 38% with family ▼8%*
- 25% with partner ▼9%*
- 10% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
14%	38% ▼3%*	25% ▼6%*	13%	10% ▲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€+
11% ▼9%*	24% ▼7%*	19%	16%	12%	9% ▲5%*	8%

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%
- Coast & Sea: 15%
- Culture & Heritage: 13%

TOP 5 EUROPEAN DESTINATIONS**

Italy	10%
Croatia	9%
France	6%
Czech Republic	6%
Spain	6%

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

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

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

SNAPSHOT: SPANISH TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	71% ▼8%*	8%	21% ▲9%*
May '22	79%	10%	12%

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

TRAVEL READINESS

- Destination not chosen: 15%
- Trip fully booked: 18%
- Trip partially booked: 26% ▲10%*
- **Destination chosen but trip not booked yet**: **41%** ▼11%*

POPULAR TRAVEL PERIODS

- June-July ‘23: 33% ▲8%*
- August-September ‘23: **39%** ▼12%*
- October-November‘23: 17% ▲4%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 33%
- NON-NEIGHBOURING COUNTRY: 20% ▲3%*
- WITHIN MY COUNTRY: 31% ▼10%*
- OUTSIDE EUROPE: 11% ▲7%*

TRAVELLING WITH?

- 39% with partner ▼4%*
- 30% with family ▼7%*
- 9% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
16% ▲3%*	45% ▼3%*	22% ▼5%*	10%	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€+
14%	22% ▼13%*	18%	17%	14% ▲7%*	8%	7% ▲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 **28%** ▼5%*
- Culture & Heritage **16%**
- Sun & Beach **13%**

TOP 5 EUROPEAN DESTINATIONS**

France	12%	▼8%*
Italy	10%	
Germany	6%	
Portugal	6%	▼4%*
UK	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: SWISS TRAVEL PLANS

Travel horizon: June-November 2023

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
May '23	56% ▲ 4%*	13% ▼ 7%*	30% ▲ 3%*
May 22	53%	20%	27%

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

TRAVEL READINESS

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

POPULAR TRAVEL PERIODS

June-July '23	August-September '23	October-November'23
33%	28% ▼ 5%*	21% ▲ 4%*

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	28%
NON-NEIGHBOURING COUNTRY	25%
WITHIN MY COUNTRY	20% ▼ 3%*
OUTSIDE EUROPE	18%

TRAVELLING WITH?

with family	with partner	solo
27%	21%	15%

INTENDED LENGTH OF STAY AND BUDGET

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

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
10%	16% ▼ 4%*	13%	17%	20% ▲ 7%*	13%	11%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

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

TOP 5 EUROPEAN DESTINATIONS**

Italy	6% ▼ 4%*
France	5%
Germany	5%
Croatia	5%
Denmark	4%

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

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

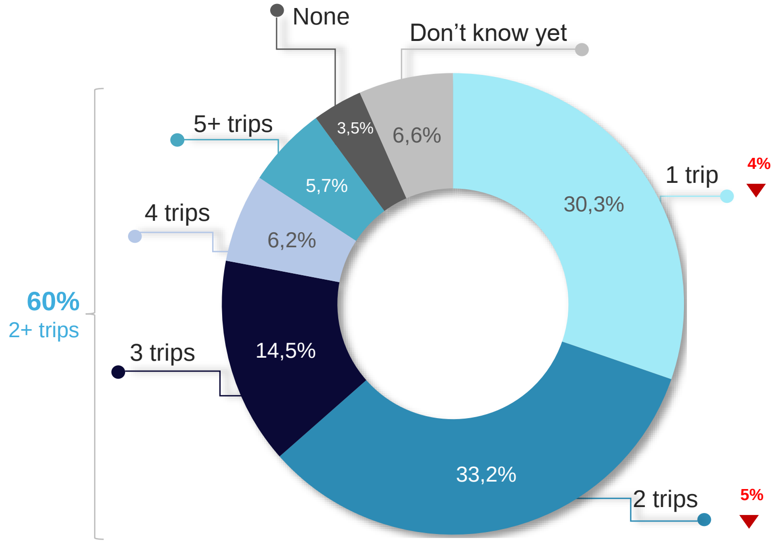
No. of respondents: 485 (total sample of respondents per country)

PLANNING THE DETAILS

02

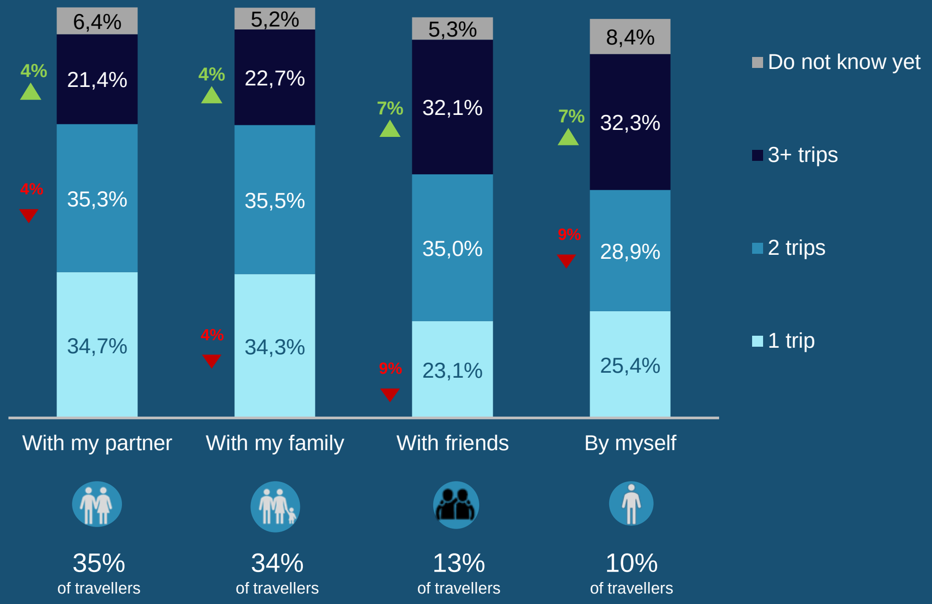
60% of Europeans plan multiple trips this summer and autumn, and out of them, 12% intend to take four or more trips

Number of intended trips within Europe in the next six months



May '23 survey

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



No. of respondents: 4,165

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

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

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

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

UK
68.8% ▲ 6%*

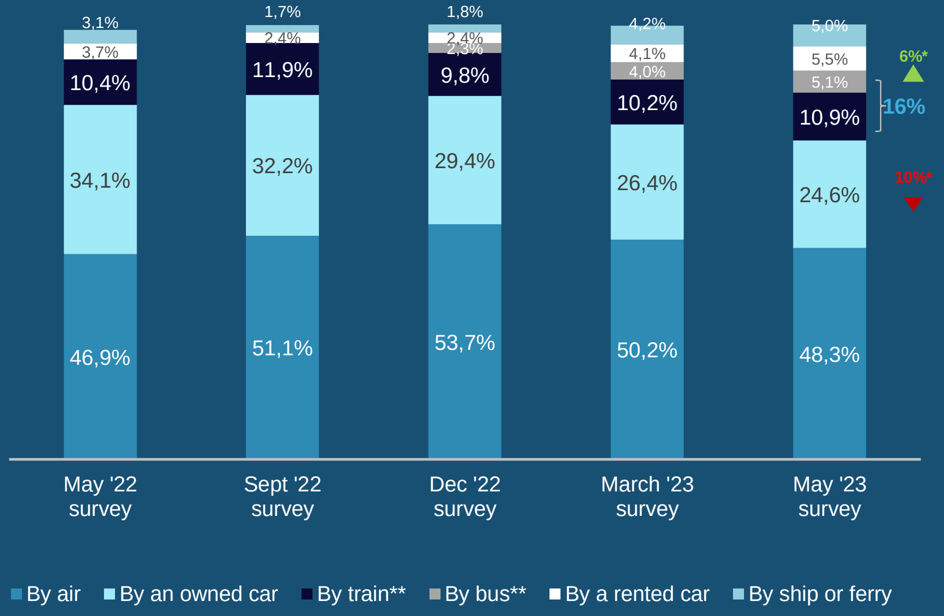
France
57.0% ▲ 10%*

Spain
65.4%

Poland
49.2%

Italy
57.8%

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

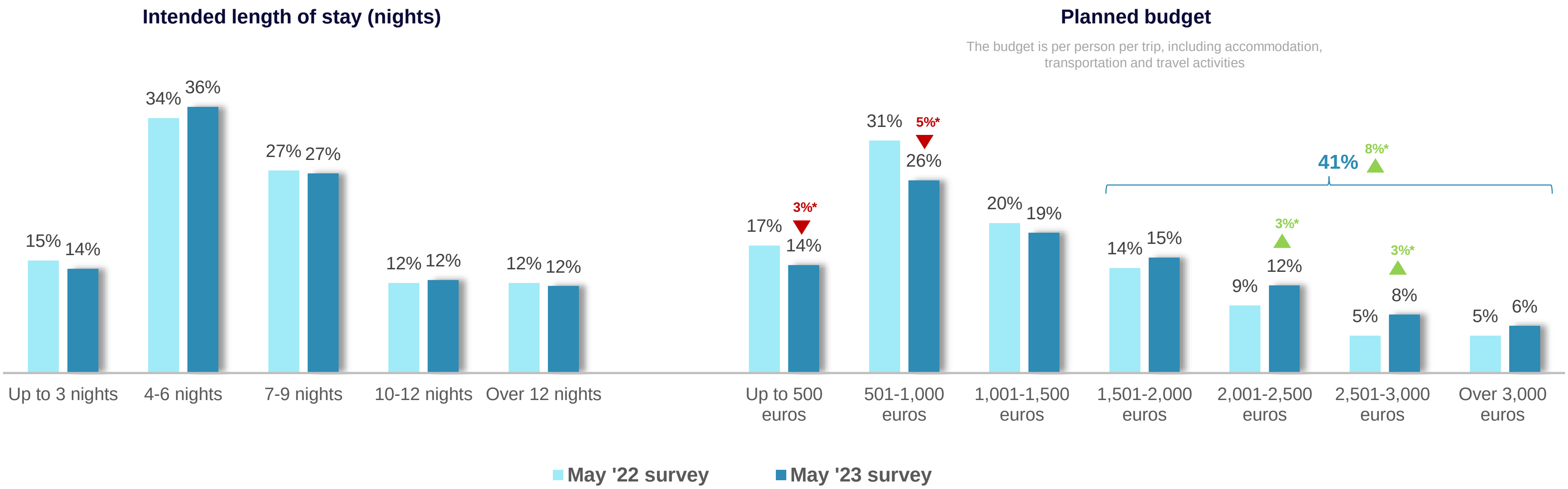


Q13. Which of the following modes of transport would you most consider using during your next trip within Europe?

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

No. of respondents: 4,165

Europeans plan to enjoy similar lengths of holidays as last year, while the share of travellers planning to spend over 1,500 euros increases by 8%, perhaps due to the soaring rise in travel costs



FINANCIAL CONCERNS AND TRAVEL BUDGETS

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

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

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

No. of respondents: 4,165

BUDGET ALLOCATION BY TRIP LENGTH

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

	< 3 nights	4-6 nights	7-9 nights
< 500 euros	36%	14%	9%
501 - 1,000 euros	28%	30%	26%
1,001 - 1,500 euros	13%	20%	20%
1,501 - 2,000 euros	8%	16%	18%
2,001 - 2,500 euros	4%	11%	13%

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

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

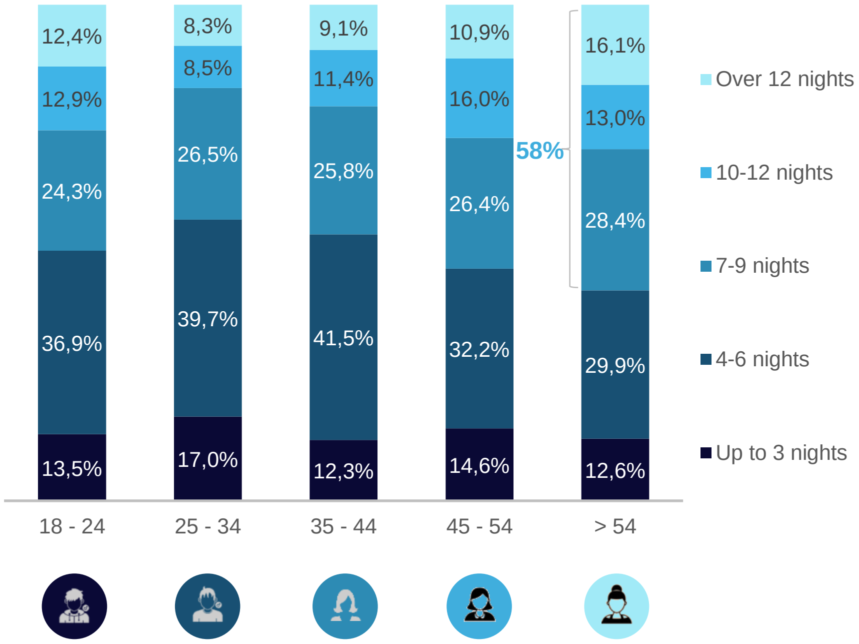
No. of respondents: 4,165

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

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

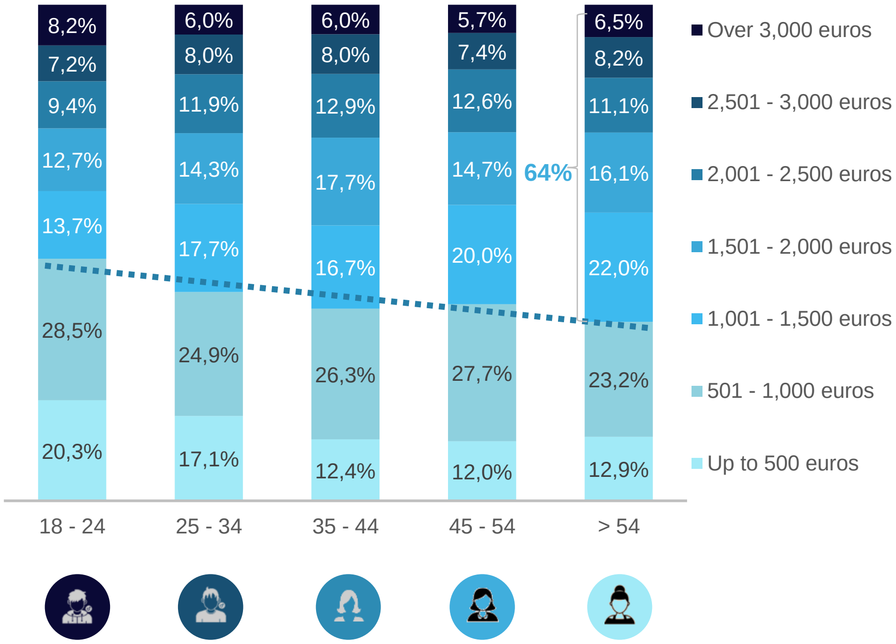
The older the travellers are, the higher their budgets and lengths of stay at the destination: Gen X (aged 45-54) and Baby Boomers (aged >54) plan to spend the most and stay longer

Intended length of stay (nights)



Envisaged budget

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



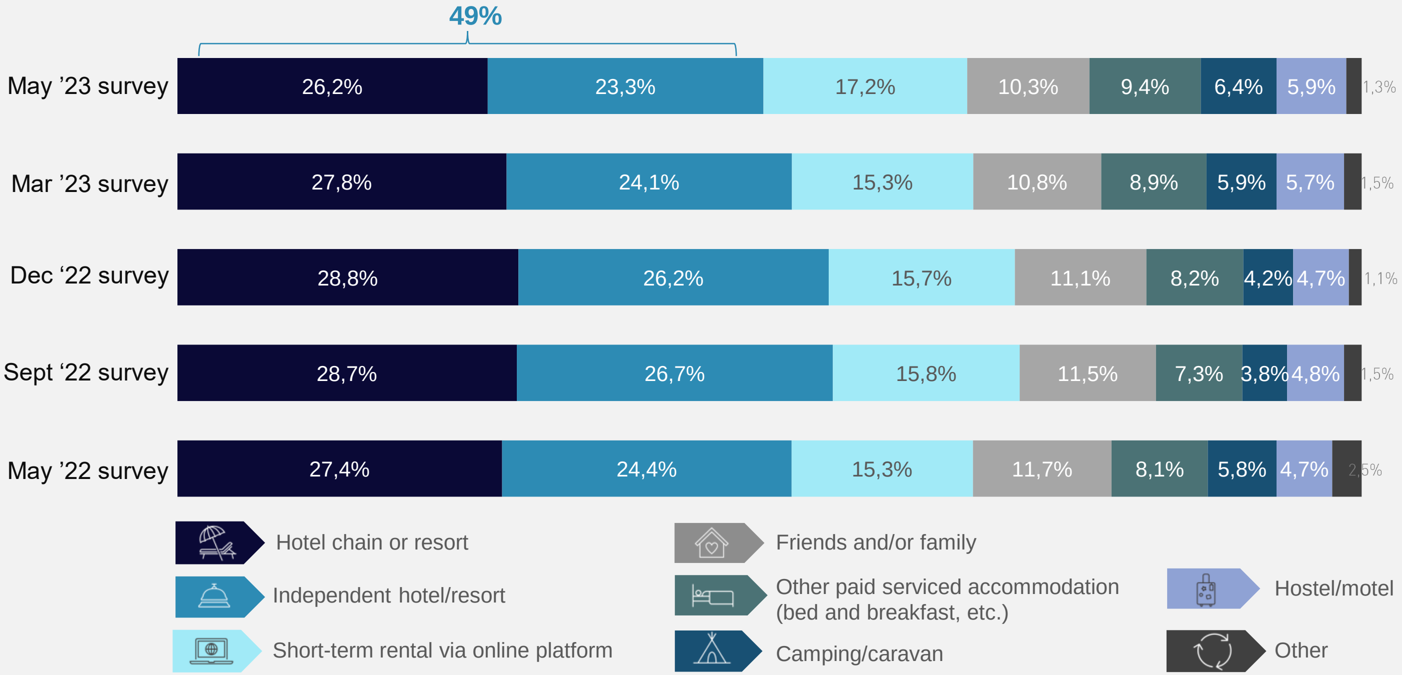
Q17. What would be the length of your next overnight trip?

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

No. of respondents: 4,165

An increasing number of Europeans opt for stays in short-term rentals (17%), while preference for hotels drops below the 50% threshold

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



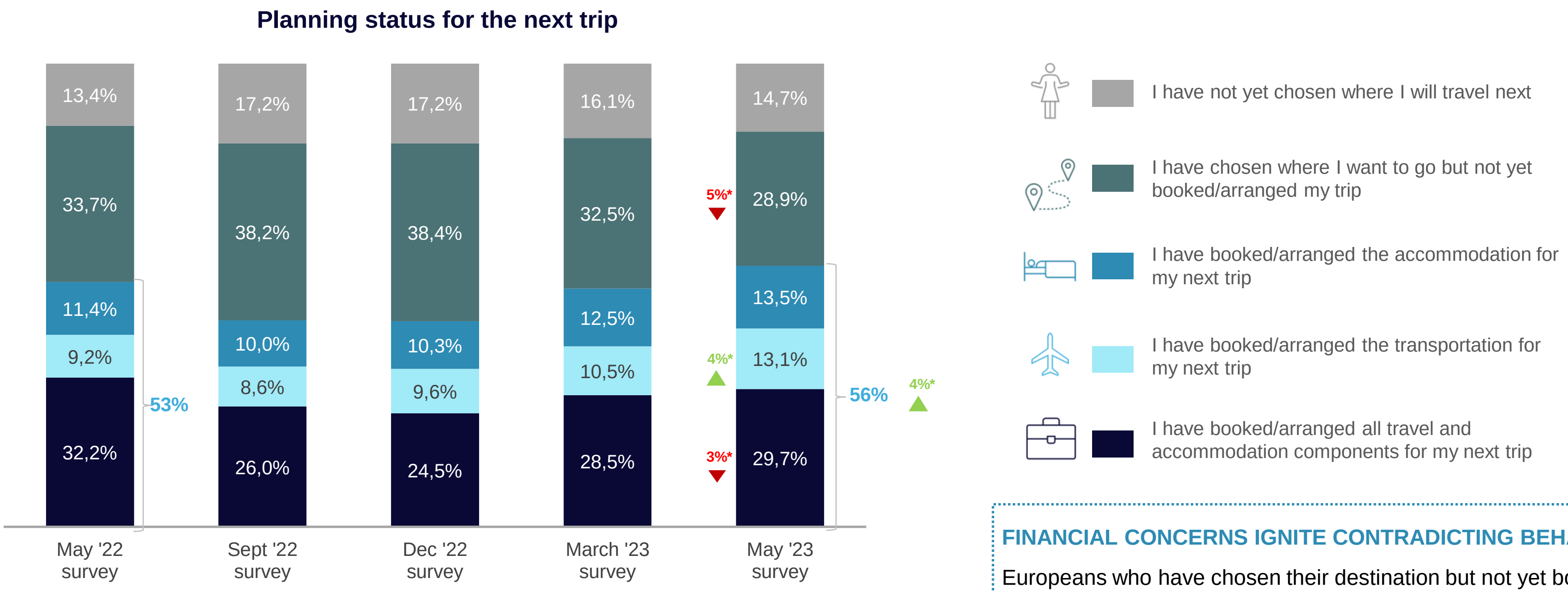
31% of Europeans booking short-term rentals will opt for less expensive restaurants and self-catering options, compared to 25% of travellers who prefer hotels

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 (May 2022)

No. of respondents: 4,165

European travellers are becoming more proactive in relation to their trip bookings: 56% have already partially or fully booked, up by 4% compared to 2022



FINANCIAL CONCERNS IGNITE CONTRADICTING BEHAVIOUR

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

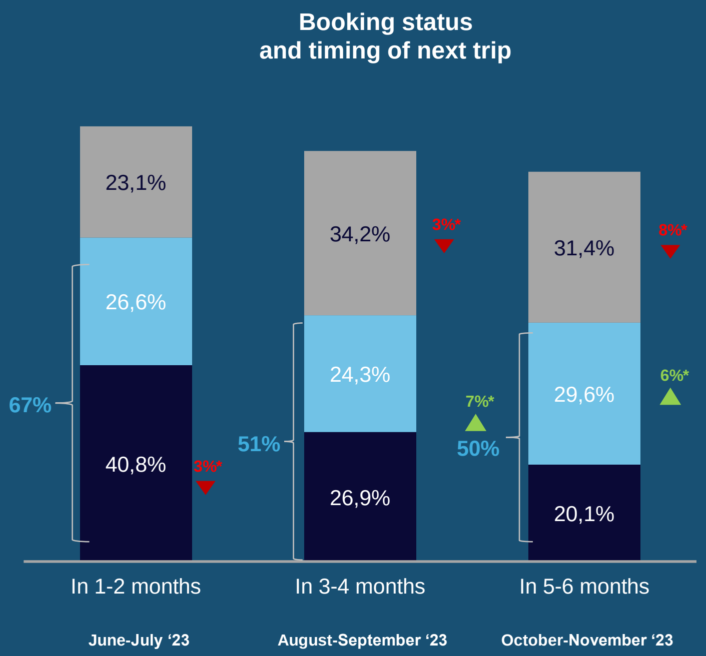
Travellers who have only booked their transportation or accommodation have shown lower levels of concern (31% and 35% respectively).

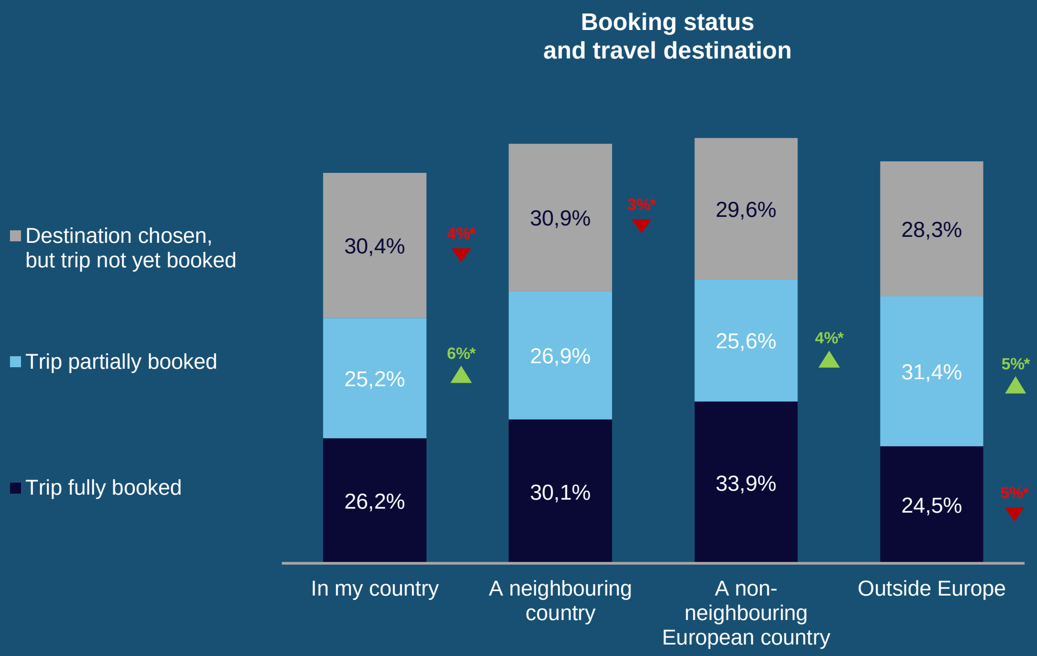
 Q21. Please select a response which best describes the planning for your next trip:

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

No. of respondents: 4,165

50% of Europeans planning off-season journeys in October-November have already fully or partially booked their trip. Holidays to non-neighbouring European countries have the highest share of early booking (60%).





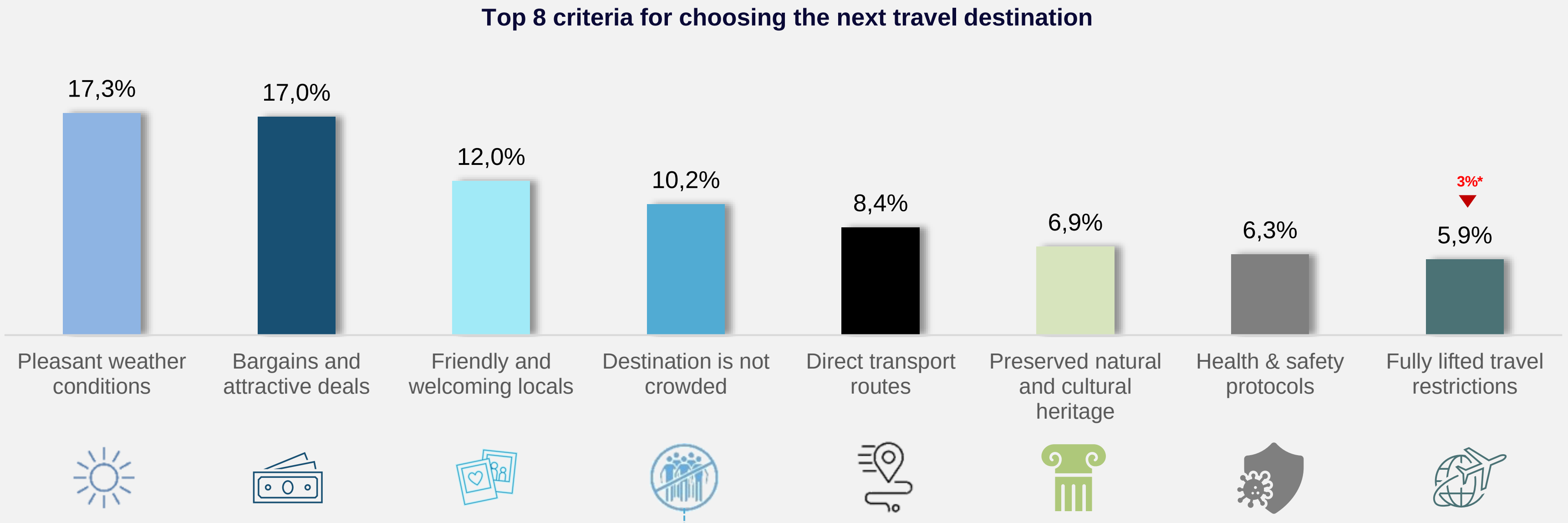
May '23 survey

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

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

No. of respondents: 4,165

Europeans' top criteria for choosing a travel destination remain stable: pleasant weather, attractive deals and welcoming locals



For approximately one-third **(31%) of Europeans** gearing up for **Nature & Outdoors trips** in the coming months, the primary factor influencing their destination choice is the **crowd level** at the location.

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

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

No. of respondents: 6,002

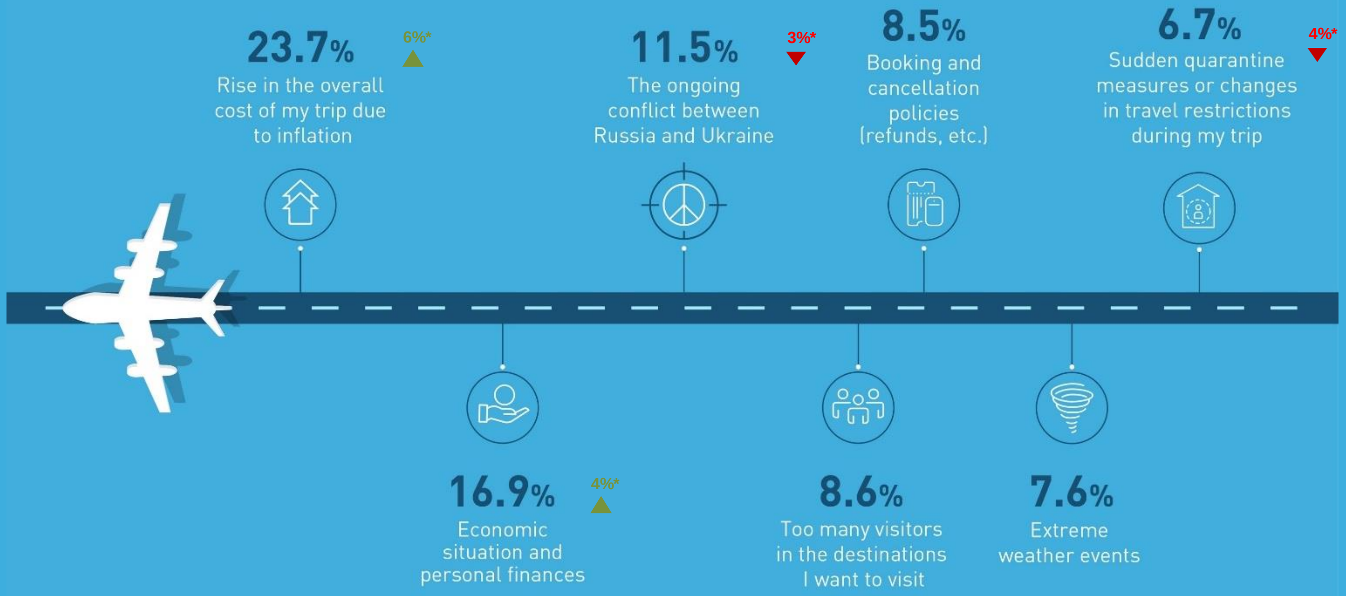
TRAVEL CONCERNS

03

WHAT DO EUROPEAN TRAVELLERS WORRY ABOUT?

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

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



Top 4 markets concerned with rising travel costs	Top 4 markets concerned with personal finances
UK 27%	UK 19%
Poland 27%	Spain 18%
Italy 26%	Poland 18%
Spain 25%	Italy 17%

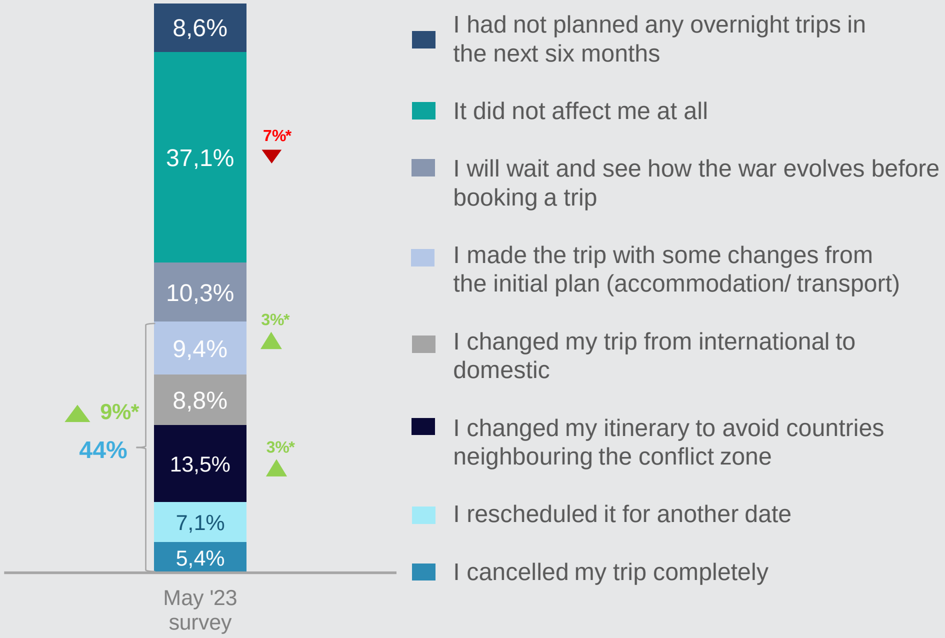
Q4. What currently concerns you the most about travelling within Europe?

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

No. of respondents: 4,165

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

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



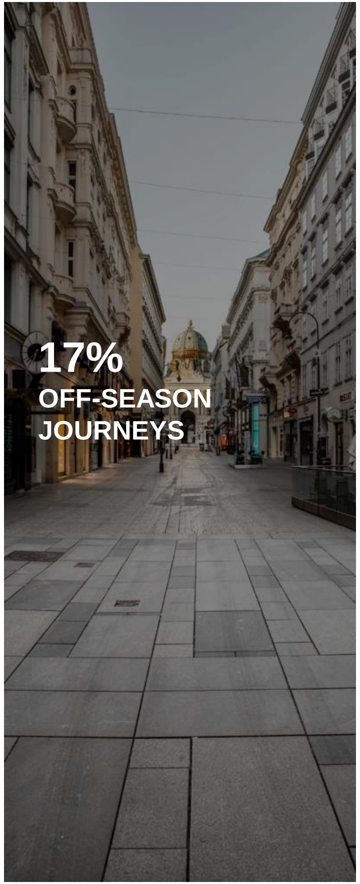
Top 5 markets changing their travel plans		Most often mentioned change: 'I changed my itinerary to avoid countries neighbouring the conflict zone'
Switzerland	60.1%	15%
Austria	58.6%	12%
Poland	54.2%	16%
Germany	51.3%	14%
Spain	49.7%	17%

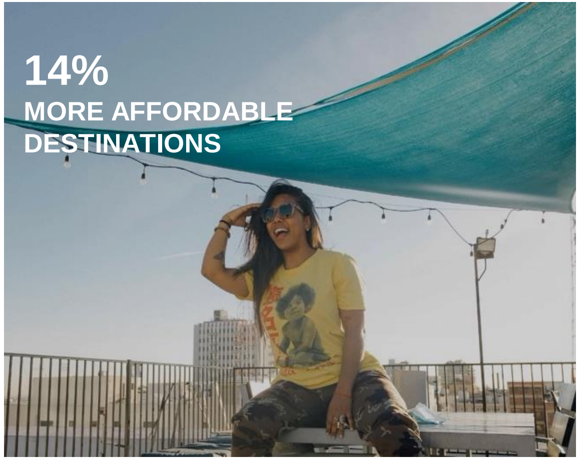
* Statistically significant difference vs a year ago(May 2022)

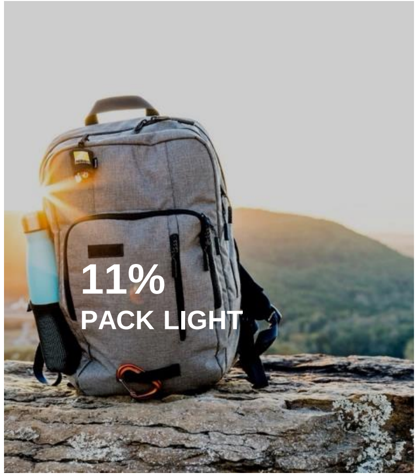
Q2. How has the ongoing war between Russia and Ukraine affected your plans to travel within Europe in the next 6 months?

No. of respondents: 6,000

AMID RISING COSTS, EUROPEANS ADAPT TRAVEL PREFERENCES AND BOOKING BEHAVIOR PRIOR TO REACHING THEIR DESTINATIONS



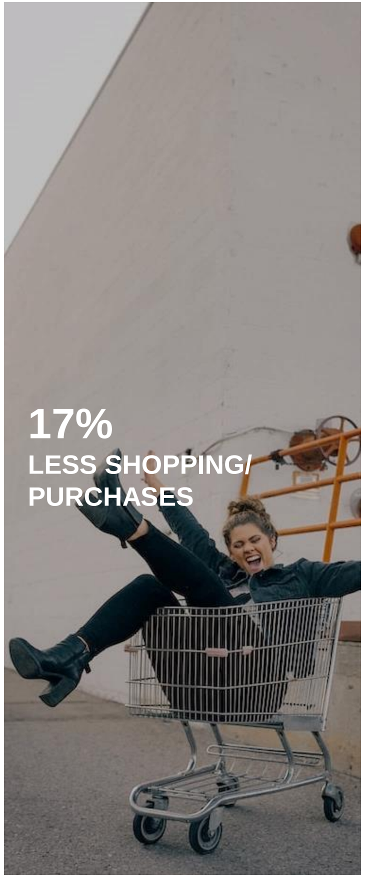


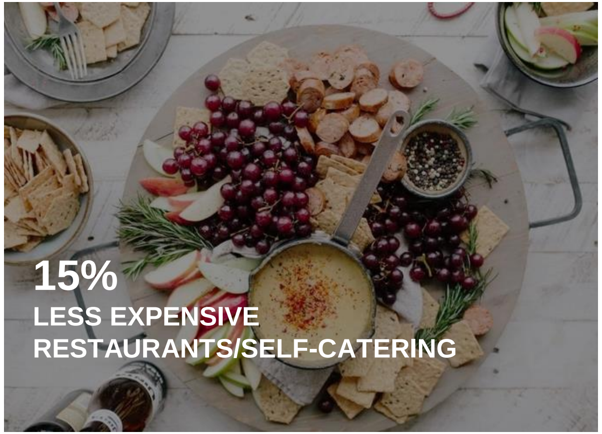


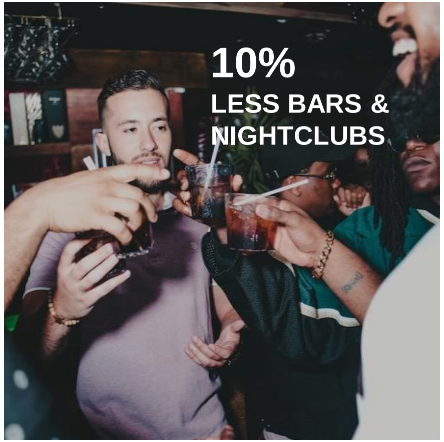
Q19. In the context of inflation and rising travel costs, which of the following travel behaviours are you most likely to adopt before reaching your next destination?

No. of respondents: 4,165

THE IN-DESTINATION BEHAVIOR IS ALTERED TOO
TO FIT WITHIN THE AVAILABLE BUDGET





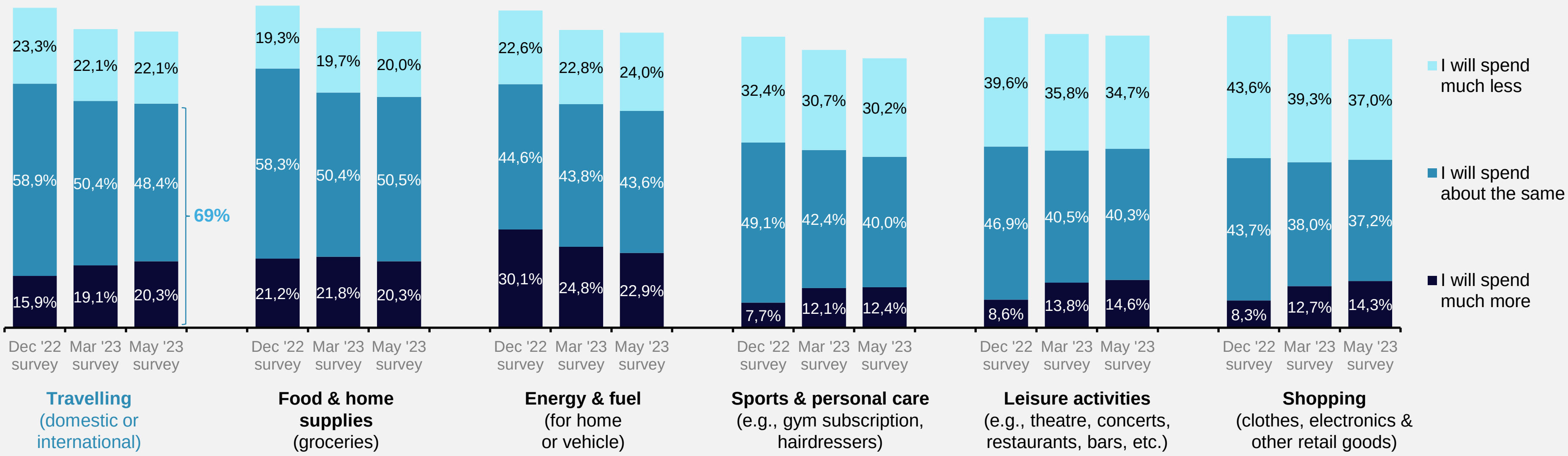


Q20. In the context of inflation and rising costs of travel, which of the following travel behaviours are you most likely to adopt during your next vacation?

No. of respondents: 4,165

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

Anticipated changes in spending, in the coming six months



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

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

No. of respondents: 6,002

METHODOLOGICAL ANNEX

04

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 12**: 09-12 May 2022; sample = 6,005 / **Wave 13**: 13-23 September 2022; sample = 5,988 / **Wave 14**: 15-29 December 2022; sample = 6,000 / **Wave 15**: 1-7 March 2023; sample = 6,000 / / **Wave 16**: 8 May-4 June 2023*; sample = 6,002
  - **Countries**: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - **Languages**: English, French, German, Italian, Spanish, Polish and Dutch
- **Research themes examined**: travel personas (one question), travel concerns and impact of external shocks on travel (8 questions), and travel intentions, preferences and trip planning (13 questions)
- 47% of the Wave 16 survey respondents are male and 53% are female. Sample size and age groups are listed below:

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

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

Study on Monitoring Sentiment for Intra-European Travel

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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