MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

Travel horizon: October 2023 – March 2024

EUROPEAN TRAVEL COMMISSION

Co-funded by the European Union

WAVE 17 RESEARCH HIGHLIGHTS

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

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

- **68% of Europeans plan to travel between October 2023 and March 2024,** representing a 3% decrease compared to a year ago. The desire to travel is strongest among Europeans aged over 35 (71%) and comparatively lower (61%) among the 18-34-year-olds.
- **38% of Europeans plan to travel during the autumn months** (October-November), and another **32% during the Christmas period** (December-January).
- **Visiting a neighbouring country is the leading choice** for 32% of travellers, followed by visiting a non-neighbouring European country (28%).
- **Intentions for leisure trips** (69%) **slightly decrease** compared to a year ago (72%), while the share of travellers planning a business trip rises to 8% (+3% compared to the same period in 2022).
- With summer behind, Sun & Beach trips give way to **City Breaks** (19%), **Culture & Heritage** (17%), and **Nature & Outdoor** (14%) trips as the leading choice for the colder months.

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

WAVE 17 RESEARCH HIGHLIGHTS

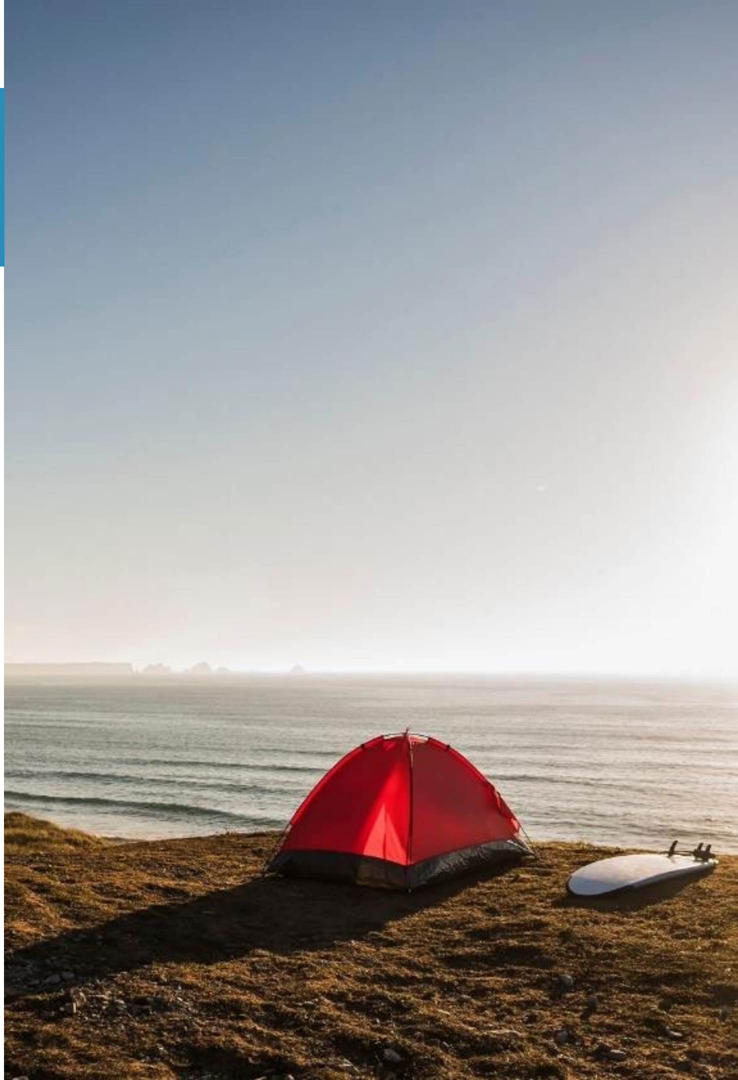
Use of greener transport options rises to an all-time high

- **Half of Europeans will fly** to their next travel destination. At the same time, the **use of train or bus services for travelling rises to the highest-recorded level** (17%, up by 5% compared to a year ago), ~~serving as~~ a greener alternative to driving (25%, down by 7% compared to 2022).
- The share of travellers planning to **spend up to 1,000 euros (44%) drops** (-9%) compared to a year ago, while the share of those with a budget of **over 1,500 euros increases by 7%** (34%). Interestingly, the **intended length of stay remains similar to the same period last year** – despite travel price inflation.
- **4-6 nights remains the most common length of stay** for Europeans (29%). The share of travellers who plan trips for more than 7 nights increases with age - from 36% among Europeans aged 18-24 to 42% in the +54 age group.
- **Hotels remain the leading accommodation choice for 53%** of Europeans and have strengthened their position compared to the summer 2023 (+3%), being followed by short-term rentals (15%).
- **45% of travellers have partially or fully booked their next trip**, down by 11% compared to the pre-summer booking rush recorded in the previous wave (conducted in May 2023).
- **Pleasant weather** (19%), **attractive deals** (17%) and **friendly locals** (12%) remain Europeans' top criteria for choosing their next travel destination.

WAVE 17 RESEARCH HIGHLIGHTS

Financial worries and extreme weather concerns shape European travel patterns

- **Travel price inflation** (22%) and **personal finances** (16%) top Europeans’ travel-related worries, followed by a 7**% surge in concerns regarding extreme weather** events (14%) compared to the summer.
- As economic pressures remain, **22% of Europeans will opt for off-season trips**, **13% will travel to more affordable destinations**, and **13% will book activities and flights in advance.**
- While at the destination, **17% will limit their shopping**, and **15% will select less expensive accommodation** and **more affordable restaurants**.
- Travellers aged 35-44 and those over 55 both **pursue value for money actively**, with the former booking flights and activities in advance and the latter favouring more affordable choices.
- The ongoing war in Ukraine affected the travel plans of 37% of Europeans, and a considerable **13% will avoid countries close to the conflict zone** (+3% compared to a year ago).



RECOMMENDATIONS FOR DESTINATIONS

Rise in off-season travel and less popular destinations

- Extreme weather events are now Europeans' third biggest travel-related concern. Destinations can enhance their tourism resilience level by **reviewing the destination's crisis management plan, revamping their tourism crisis handbook**, creating **self-assessment crisis-readiness tools and workshops** for SMEs, and launching projects for a **climate-resilient infrastructure** (i.e., sea walls, flood defences, managing vegetation for reducing the risk of wildfires).
- Destinations that attract the senior travel segment, especially those seeking longer stays, should prioritise promoting **favourable weather conditions** (32%), **low crowd levels** (31%), and **convenient transportation options** (31%) - the top criteria for this segment when selecting a destination.
- A growing share of Europeans plan to travel beyond Europe's tourism hotspots, with a rising interest in more affordable destinations (13%). More affordable destinations are advised to **highlight their price attractiveness and their offering of higher value for the travellers' budget**.
- Off-season trips are a rising trend among Europeans adapting to travel-cost inflation (22%). By **launching off-season campaigns**, destinations can better spread tourism loads, provide a much-desired crowd-free experience, and offer attractive deals.

RECOMMENDATIONS FOR BUSINESSES

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

- 44% of Europeans planning to travel around Christmas and New Year (December 2023-January 2024) have chosen their destination but have not yet booked. These travellers are more concerned by **travel price inflation** (49% vs 34% of Europeans who have partially/ fully booked their next trip) and by **the economic situation** (35% vs 26%). In response to these concerns, **marketing campaigns for this audience should reassure Europeans' confidence in early booking as the right financial decision, by promoting early-bird deals and 'book now pay later' offers.**
- As trips by train gain popularity, tourism businesses close to train stations can join efforts to **create driving-free travel itineraries that match the top interests of railway travellers**: enjoying nature (37%), experiencing the local culture (35%) and seeing famous landmarks (33%).
- Preference for hotel stays is higher among more mature travellers; hoteliers can target Europeans over the age of 54, **emphasising the opportunity to visit famous landmarks, explore the local culture, and learn about the destination's culture and history** - in addition to the hotel experience.
- 26% of travellers concerned by their environmental footprint are aged over 54 (vs only 15% among travellers aged 18-24), and **businesses with a sustainable tourism certificate could target Europeans in this more-mature age cohort**.

CONTENTS

Reading the data

Wave 17

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

	Wave 13	Wave 14	Wave 15	Wave 16	Wave 17
Survey dates	13-23 Sept '22	15-29 Dec '22	1-7 March '23	8 May-4 June '23*	11-26 Sept '23

2. **To present Wave 17 timings in which respondents are 'most likely to take their next trip', the following time periods should be used as a reference:**
   - In 1-2 months: October-November 2023
   - In 3-4 months: December 2023 - January 2024
   - In 5-6 months: February - March 2024
3. **To present data and insights, the following distinct groups have been analysed:**
   - Total respondents: 5,993
   - Respondents most likely to travel in the next 6 months: 4,062
   - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,852
4. **Significant changes between current and previous waves are calculated on a 2.5% significance level. Statistically significant differences are marked using the following symbols:**
   - Increasing ▲, decreasing ▼
   - Numbers next to the arrows reflect the actual change in the share of respondents selecting a specific response between current and previous waves

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

NOTE: Fieldwork for Wave 17 was conducted before the Israeli-Palestinian conflict, ignited in early October 2023

TRAVEL PLANS

01

Over 2 in 3 Europeans plan to travel in the coming 6 months - a third consecutive decrease since the beginnings of 2023 and 3% below September 2022, possibly due to inflation

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

Spain
75.4%

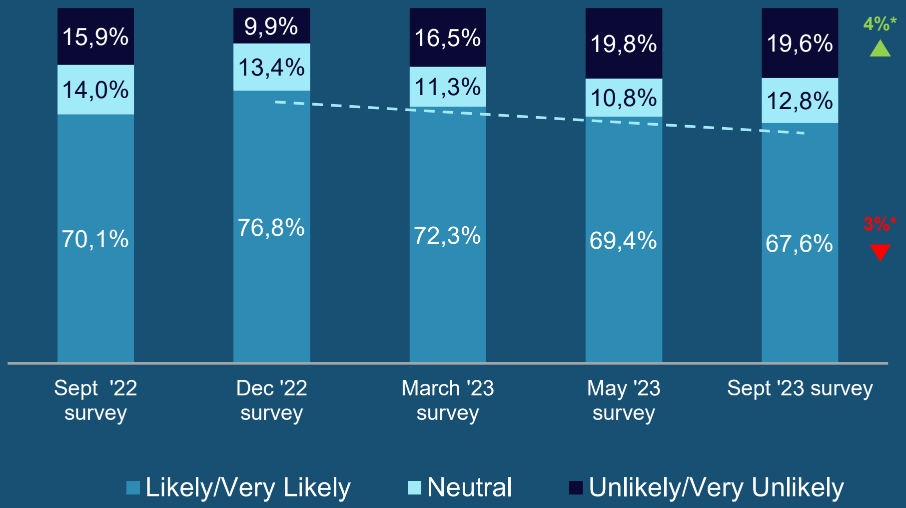
Poland
72.6%
12%* ▼

Italy
74.7%
3%* ▲

Belgium
65.4%
8%* ▼

UK
73.3%

Intention to travel in the next six months



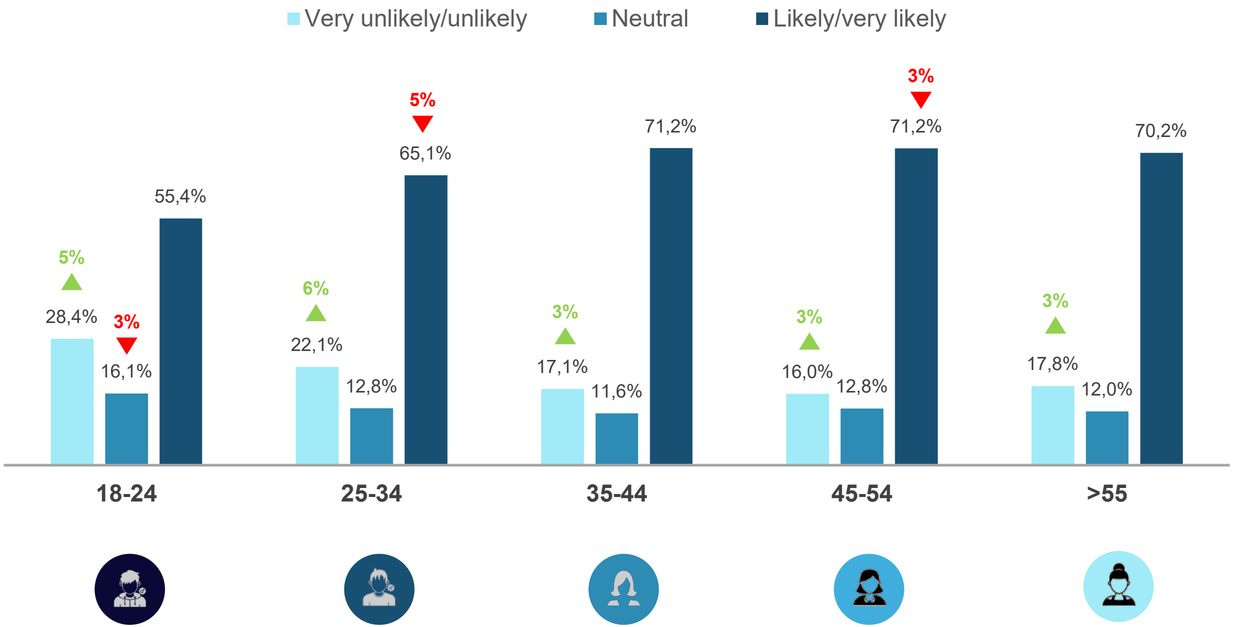
* Statistically significant difference vs a year ago (Sept' 2022)

No. of respondents: 5,993

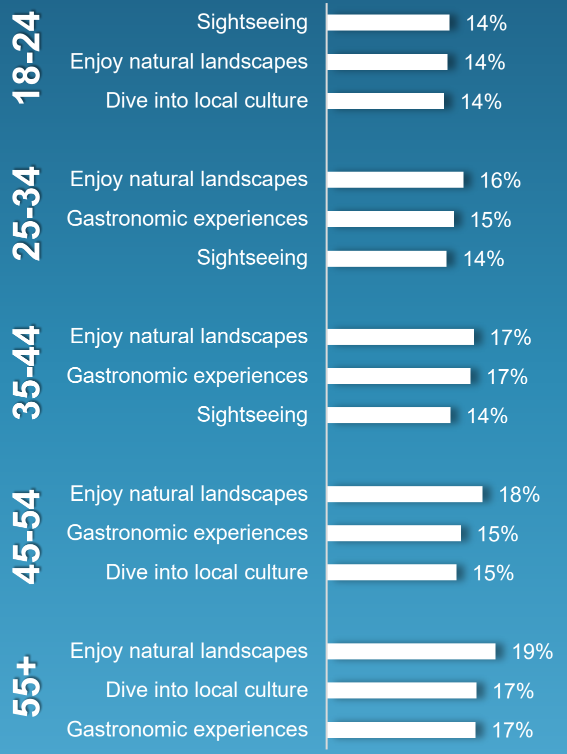
Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Europeans over the age of 35 are the most eager to travel; desire to travel drops by 5% among those aged 25-34

Intention to travel in the next six months by age group



TOP TRAVEL EXPERIENCES BY AGE GROUP:



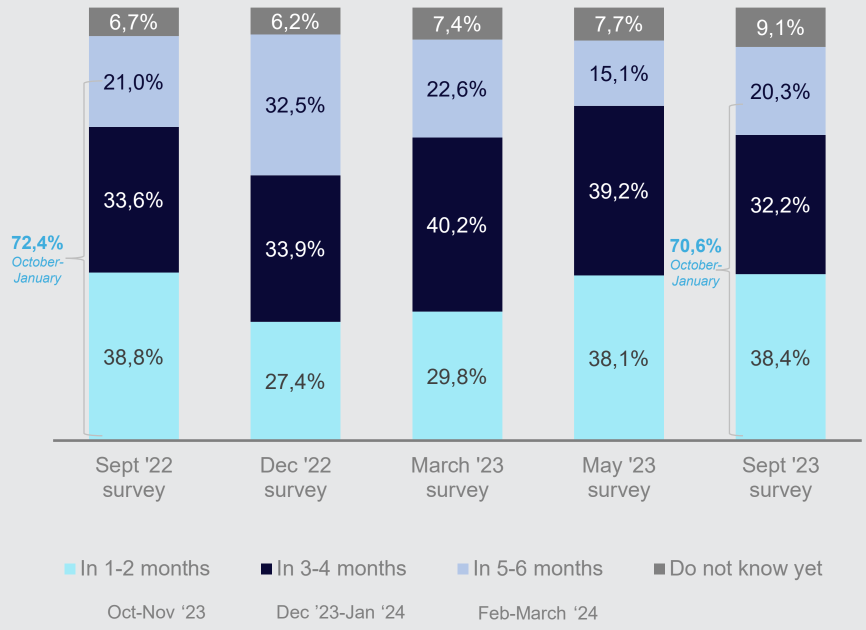
Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?
Q6. What criteria will play the most important role in choosing your next holiday destination?

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

No. of respondents: 5,993

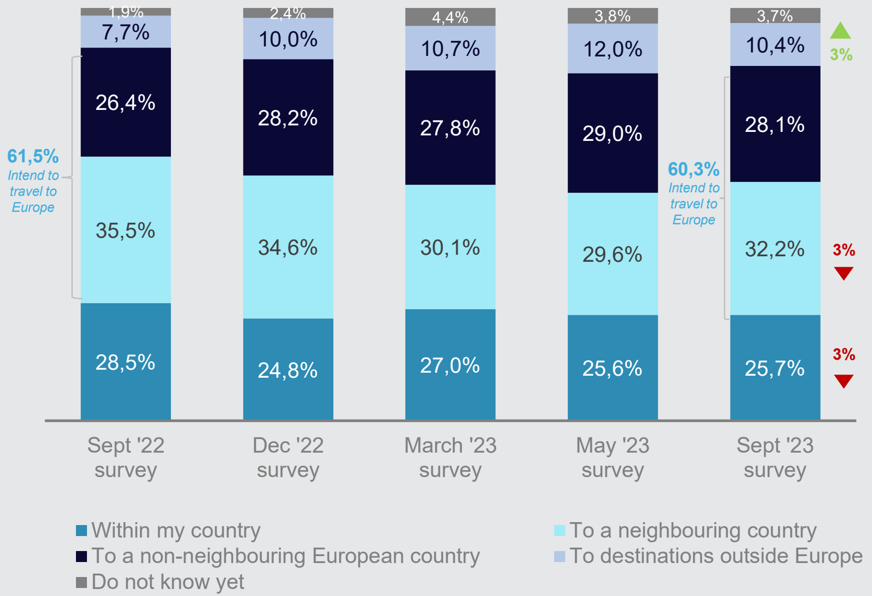
38% of Europeans plan to travel in the autumn months (October-November 2023); visiting a neighbouring country is the preferred choice (32%), slightly down compared to a year ago (-3%)

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 (Sept' 2022)

No. of respondents: 4,052

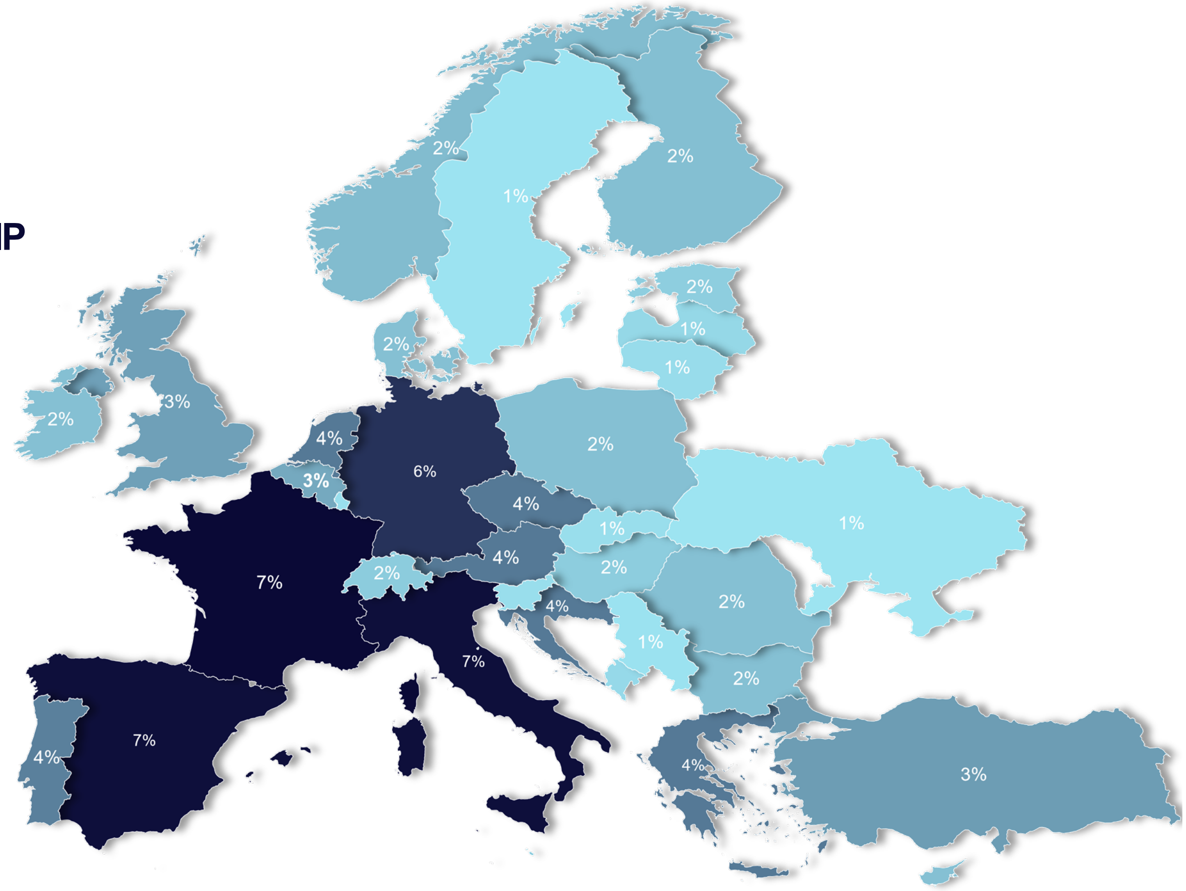
Sept ‘23 survey

PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

TOP 10 COUNTRIES

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

21% 8% ▼



* Please use this map as a reference only

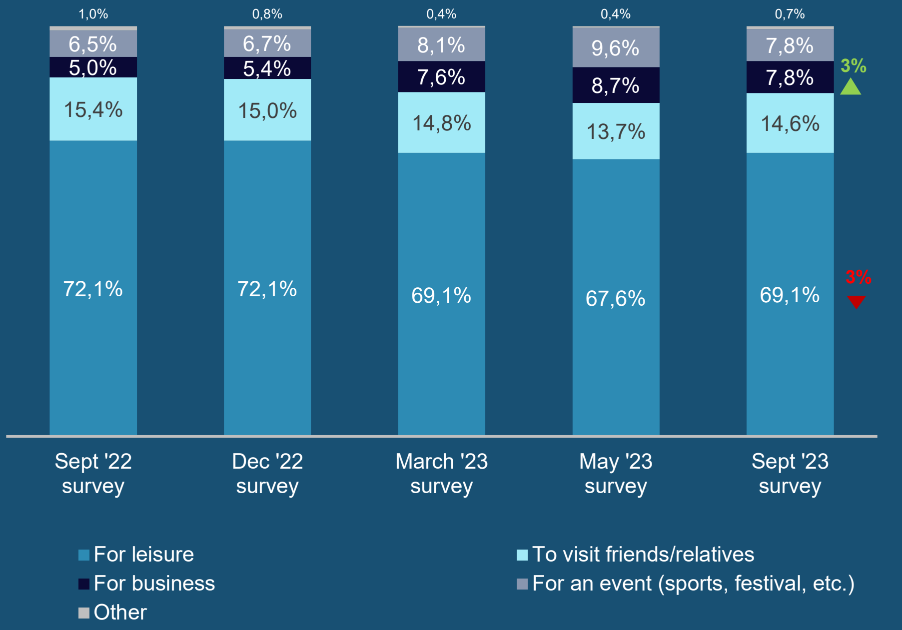
No. of respondents: 4,852

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

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

Top 3 markets to take a leisure trip		Top 3 markets to take a business trip	
Italy	78.6%	Germany	11.7% (5%* ▲)
UK	76.4%	Spain	11.5% (5%* ▲)
Poland	73%	Switzerland	11%

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



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

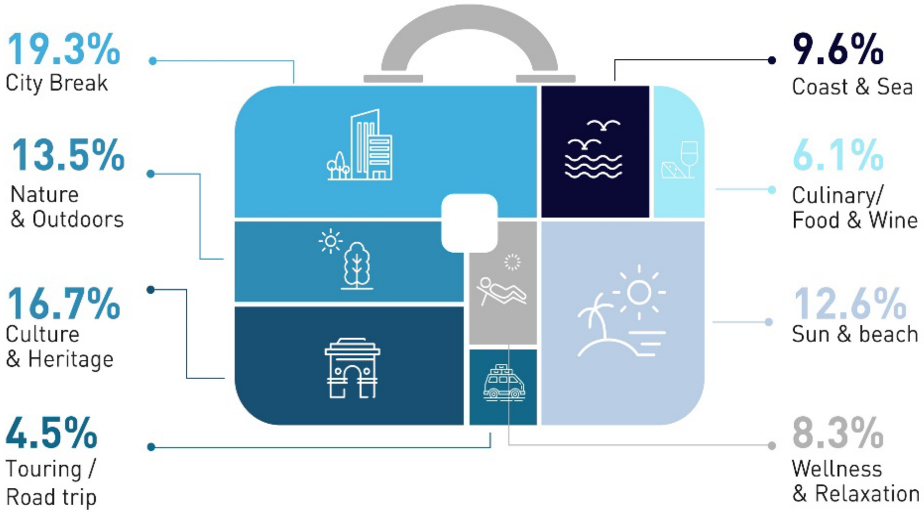
Results for business trip per country are indicative due to small sample bases

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

No. of respondents: 4,052

City Breaks, Culture & Heritage travels, and Nature & Outdoors getaways continue to hold sway as the most sought-after holiday types among Europeans in the coming months

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 (Sept 2022)

No. of respondents: 4,052

EUROPEANS' MOST IN-DEMAND TRIP TYPES AND EXPERIENCES

Travel horizon: October 2023 - March 2024

	City Break	Culture & Heritage	Nature & Outdoors	Sun & Beach
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	**27%** >55 **21%** 25-34	**36%** >55 **22%** 45-54	**29%** >55 **23%** 35-44	**24%** 25-34 **24%** 35-44
MOST COMMON LENGTH OF STAY & BUDGET	**45%** 4-6 nights **36%** 500-1000 € **36%** Up to 3 nights **21%** Up to 500 €	**46%** 4-6 nights **26%** 500-1000 € **21%** Up to 3 nights **22%** 1001-1500 €	**41%** 4-6 nights **28%** 500-1000 € **28%** 7-9 nights **24%** 1001-1500 €	**31%** 4-6 nights **31%** 500-1000 € **31%** 7-9 nights **20%** 1001-1500 €
TOP 4 EXPERIENCES TO TRY	**20%** Sightseeing **17%** Learn about history **17%** Dive into local culture **17%** Gastronomic experiences	**22%** Learn about history **18%** Dive into local culture **16%** Sightseeing **15%** Enjoy natural landscapes	**26%** Enjoy natural landscapes **15%** Gastronomic experiences **14%** Dive into local culture **12%** Active experiences	**19%** Enjoy natural landscapes **17%** Gastronomic experiences **15%** Dive into local culture **14%** Sightseeing

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

No. of respondents: 4,052

SNAPSHOT: AUSTRIAN TRAVEL PLANS

Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	63% ▲4%*	14%	23% ▼6%*
Sept '22	59%	20%	21%

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

TRAVEL READINESS

- Destination not chosen: 20% ▼6%*
- Trip fully booked: 18% ▼7%*
- Trip partially booked: 29%
- Destination chosen but trip not booked yet: 33% ▲13%*

POPULAR TRAVEL PERIODS

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

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 32%
- NON-NEIGHBOURING COUNTRY: 21%
- WITHIN MY COUNTRY: 23% ▼6%*
- OUTSIDE EUROPE: 13% ▲6%*

TRAVELLING WITH?

- 33% with partner ▼4%*
- 31% with family ▲5%*
- 13% 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%*	33% ▼3%*	16%	8% ▲5%*	11% ▲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€+
26% ▼6%*	28% ▼6%*	18% ▲4%*	10%	7%	5% ▲3%*	6% ▲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 21%
- Nature & Outdoors 14%
- Wellness & Relaxation 14% ▼5%*

TOP 5 EUROPEAN DESTINATIONS**

Germany	12%	
Italy	8%	▼4%*
Croatia	6%	▼3%*
Hungary	5%	
France	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: BELGIAN TRAVEL PLANS

Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	65% ▼ 8%*	13%	21% ▲ 8%*
Sept 22	73%	14%	13%

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

TRAVEL READINESS

- Destination not chosen: 25% ▲ 4%*
- Trip fully booked: 18% ▼ 11%*
- Trip partially booked: 31% ▲ 10%*
- Destination chosen but trip not booked yet: 26% ▼ 4%*

POPULAR TRAVEL PERIODS

October-November'23	December '23-January '24	February-March '24
34%	25% ▼ 8%*	21%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 31% ▼ 13%*
- NON-NEIGHBOURING COUNTRY: 28%
- WITHIN MY COUNTRY: 20% ▲ 5%*
- OUTSIDE EUROPE: 12% ▲ 4%*

TRAVELLING WITH?

- 33% with partner ▼ 3%*
- 24% with family ▼ 20%*
- 13% solo ▲ 5%*

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
23%	28% ▼ 7%*	24%	13% ▲ 4%*	12% ▲ 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€+
18% ▼ 5%*	24% ▼ 7%*	19%	14%	9%	9% ▲ 4%*	8% ▲ 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 **21%**
- Sun & Beach **16%**
- City Break **13%**

TOP 5 EUROPEAN DESTINATIONS**

France	14%	▼ 8%*
Italy	7%	
Spain	7%	▼ 5%*
Netherlands	5%	
Germany	4%	

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

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

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

SNAPSHOT: BRITISH TRAVEL PLANS

Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

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

TRAVEL READINESS

- Destination not chosen: 28% (5%* increase)
- Trip fully booked: 25%
- Trip partially booked: 15%
- Destination chosen but trip not booked yet: 32%

POPULAR TRAVEL PERIODS

October-November'23	December '23-January '24	February-March '24
32%	29%	19% (5%* decrease)

TRAVEL PLANNING

WHERE TO?

- ANOTHER EUROPEAN COUNTRY: 55%
- WITHIN MY COUNTRY: 29%
- OUTSIDE EUROPE: 11%

TRAVELLING WITH?

- 42% with partner (3%* increase)
- 33% with family (4%* decrease)
- 12% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
21%	38% (4%* increase)	24% (4%* decrease)	9%	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€+
21%	33%	21%	11%	7%	3%	4%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break: 18% (8%* decrease)
- Sun & Beach: 31% (8%* increase)
- Culture & Heritage: 13%

TOP 5 EUROPEAN DESTINATIONS**

Spain	13%	3%* decrease
France	10%	
Italy	9%	
Greece	7%	
Türkiye	4%	

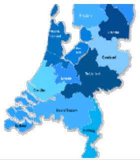
* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

SNAPSHOT: DUTCH TRAVEL PLANS

Travel horizon: October 2023-March 2024



TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept' 23	62%	15% ▼5%*	23% ▲5%*
Sept 22	61%	21%	18%

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

TRAVEL READINESS

- Destination not chosen: 27%
- Trip fully booked: 18% ▼9%*
- Trip partially booked: 29% ▲12%*
- Destination chosen but trip not booked yet: 26% ▼5%*

POPULAR TRAVEL PERIODS

October-November'23	December '23-January '24	February-March '24
28%	26% ▼5%*	24% ▲4%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 22% ▲3%*
- NON-NEIGHBOURING COUNTRY: 38% ▼4%*
- WITHIN MY COUNTRY: 19%
- OUTSIDE EUROPE: 11%

TRAVELLING WITH?

- 38% with partner ▲7%*
- 26% with family ▼14%*
- 16% solo

INTENDED LENGTH OF STAY AND BUDGET

Length of stay	%
Up to 3 nights	18% ▼3%*
4-6 nights	31%
7-9 nights	27%
10-12 nights	12%
Over 12 nights	12% ▲4%*

Budget	%
Up to 500€	14%
501-1.000€	26% ▼8%*
1.001-1.500€	22% ▲6%*
1.501-2.000€	13%
2.001-2.500€	11% ▲4%*
2.501-3.000€	8%
3.001€+	7%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Nature & Outdoors **21%**
- City Break **18%** ▼3%*
- Sun & Beach **16%**

TOP 5 EUROPEAN DESTINATIONS**

Germany	10%
France	8%
Belgium	7%
Spain	7% ▼3%*
Austria	5%

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

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

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

SNAPSHOT: FRENCH TRAVEL PLANS
Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	63% ▼4%*	12%	25% ▲3%*
Sept 22	67%	11%	22%

TRAVEL READINESS

- Destination not chosen: 29% ▼4%*
- Trip fully booked: 14%
- Trip partially booked: 25% ▲7%*
- Destination chosen but trip not booked yet: 32% ▼4%*

POPULAR TRAVEL PERIODS

- October-November'23: 22%
- December '23-January '24: 26%
- February-March '24: 29% ▲3%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 31%
- NON-NEIGHBOURING COUNTRY: 18% ▲4%*
- WITHIN MY COUNTRY: 30% ▼5%*
- OUTSIDE EUROPE: 15%

TRAVELLING WITH?

- 36% with partner ▼5%*
- 30% with family ▼11%*
- 13% solo ▲7%*

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
17%	34% ▼3%*	26% ▼8%*	13% ▲4%*	11% ▲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€+
17%	24% ▼8%*	20%	14%	9%	9% ▲5%*	7% ▲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: 23%
- Nature & Outdoors: 16%
- Sun & Beach: 13% ▼4%*

TOP 5 EUROPEAN DESTINATIONS**

Italy	9%	▼4%*
Spain	7%	▼4%*
Greece	6%	▼6%*
Portugal	5%	
Croatia	4%	

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

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

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

SNAPSHOT: GERMAN TRAVEL PLANS

Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	62% ▼ 8%*	13%	24% ▲ 9%*
Sept 22	71%	14%	16%

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

TRAVEL READINESS

Trip fully booked	22% ▼ 5%*
Trip partially booked	31% ▲ 11%*
Destination chosen but trip not booked yet	30% ▼ 5%*
Destination not chosen	17%

POPULAR TRAVEL PERIODS

October-November'23	December '23-January '24	February-March '24
34% ▼ 4%	27%	21%

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY	27% ▼ 6%*
NON-NEIGHBOURING COUNTRY	27% ▲ 5%*
WITHIN MY COUNTRY	24% ▼ 9%*
OUTSIDE EUROPE	15% ▲ 7%*

TRAVELLING WITH?

with partner	with family	solo
31% ▼ 4%*	23% ▼ 17%*	17% ▲ 4%*

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
19%	30% ▼ 6%*	21%	15%	14% ▲ 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€+
17% ▼ 6%*	24% ▼ 10%*	18%	14%	11% ▲ 4%*	8% ▲ 5%*	9% ▲ 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	15% ▼ 3%*
Sun & Beach	15%
City Break	14%

TOP 5 EUROPEAN DESTINATIONS**

Spain	6%	▼ 3%*
Italy	6%	▼ 3%*
Czech Republic	6%	
Austria	6%	▼ 6%*
France	5%	▼ 3%*

* 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: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	75% ▲ 3%*	12%	13%
Sept 22	72%	14%	15%

TRAVEL READINESS

- Destination not chosen: 28% (▼ 11%*)
- Trip fully booked: 18% (▲ 5%*)
- Trip partially booked: 17% (▼ 9%*)
- **Destination chosen but trip not booked yet**: 37% (▲ 15%*)

POPULAR TRAVEL PERIODS

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

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 24%
- NON-NEIGHBOURING COUNTRY: 29% (▲ 4%*)
- WITHIN MY COUNTRY: 33% (▼ 8%*)
- OUTSIDE EUROPE: 7% (▲ 4%*)

TRAVELLING WITH?

- **38%** with partner
- 33% 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
23% (▼ 7%*)	48%	20% (▲ 5%*)	6%	3%

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% (▼ 7%*)	32%	23%	12%	7%	5%	4%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

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

TOP 5 EUROPEAN DESTINATIONS**

France	10%	▼ 4%*
Spain	10%	
Germany	6%	▼ 3%*
Austria	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: 750 (total sample of respondents per country)

SNAPSHOT: POLISH TRAVEL PLANS

Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	73% ▼ 12%*	8% ▲ 3%*	19% ▲ 8%*
Sept 22	85%	5%	11%

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

TRAVEL READINESS

- Destination not chosen: 22% ▲ 11%*
- Trip fully booked: 14% ▼ 5%*
- Trip partially booked: 24%
- **Destination chosen but trip not booked yet**: 40% ▼ 7%*

POPULAR TRAVEL PERIODS

October-November'23	December '23-January '24	February-March '24
35%	27% ▼ 9%*	20%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 26% ▼ 5%*
- NON-NEIGHBOURING COUNTRY: 26% ▼ 8%*
- WITHIN MY COUNTRY: 31% ▲ 7%*
- OUTSIDE EUROPE: 10%

TRAVELLING WITH?

- 35% with family ▼ 9%*
- 32% 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
15% ▲ 4%*	40% ▼ 7%*	27%	9%	9% ▲ 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€+
18% ▲ 4%*	23% ▼ 6%*	16% ▼ 4%*	18%	12%	6%	7%

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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

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

TOP 5 EUROPEAN DESTINATIONS**

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

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

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

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

SNAPSHOT: SPANISH TRAVEL PLANS

Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	75%	14%	11%
Sept 22	75%	13%	13%

TRAVEL READINESS

- Destination not chosen: 21%
- Trip fully booked: 16% (4%* ▲)
- Trip partially booked: 15%
- Destination chosen but trip not booked yet: 48% (6%* ▼)

POPULAR TRAVEL PERIODS

October-November'23	December '23-January '24	February-March '24
33% (▲ 7%*)	32% (▲ 4%*)	15% (▼ 6%*)

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 35% (4%* ▼)
- NON-NEIGHBOURING COUNTRY: 22% (8%* ▲)
- WITHIN MY COUNTRY: 33% (5%* ▼)
- OUTSIDE EUROPE: 7%

TRAVELLING WITH?

- 43% with partner (3%* ▼)
- 28% with family (10%* ▼)
- 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%	49% (3%* ▼)	20%	6% (3%* ▲)	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€+
14% (7%* ▼)	32%	23%	15% (3%* ▲)	7%	7%	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%
- Culture & Heritage: 20%
- Nature & Outdoors: 12% (3%* ▲)

TOP 5 EUROPEAN DESTINATIONS**

France	15%	6%* ▼
Italy	11%	
Germany	9%	
Portugal	6%	3%* ▼
UK	6%	

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

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

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

SNAPSHOT: SWISS TRAVEL PLANS

Travel horizon: October 2023-March 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Sept '23	63% ▼ 6%*	15%	22% ▲ 8%*
Sept 22	69%	17%	14%

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

TRAVEL READINESS

- Destination not chosen: 23%
- Trip fully booked: 21% ▼ 5%*
- Trip partially booked: 28%
- Destination chosen but trip not booked yet: 28%

POPULAR TRAVEL PERIODS

October-November'23	December '23-January '24	February-March '24
35% ▼ 5%*	29%	20% ▲ 6%*

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING COUNTRY: 35% ▼ 9%*
- NON-NEIGHBOURING COUNTRY: 25%
- WITHIN MY COUNTRY: 18%
- OUTSIDE EUROPE: 14% ▲ 7%*

TRAVELLING WITH?

- 32% with family ▼ 10%*
- 26% with partner
- 16% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
25%	35% ▼ 4%*	20%	10%	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€+
14%	22% ▼ 10%*	18%	15%	14% ▲ 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 **15%**
- Coast & Sea **15%**
- City Break **13%**

TOP 5 EUROPEAN DESTINATIONS**

Italy	11%	
Germany	8%	6%* ▼
France	6%	6%* ▼
Austria	6%	
Spain	6%	

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

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

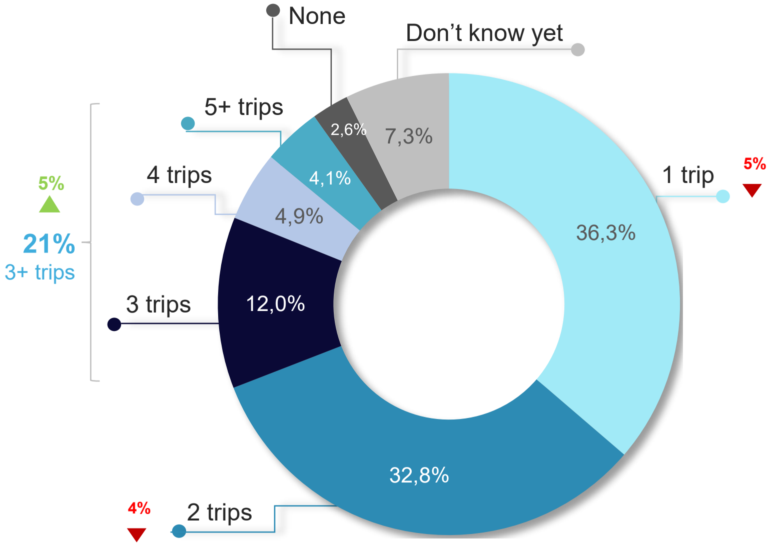
No. of respondents: 493 (total sample of respondents per country)

PLANNING THE DETAILS

02

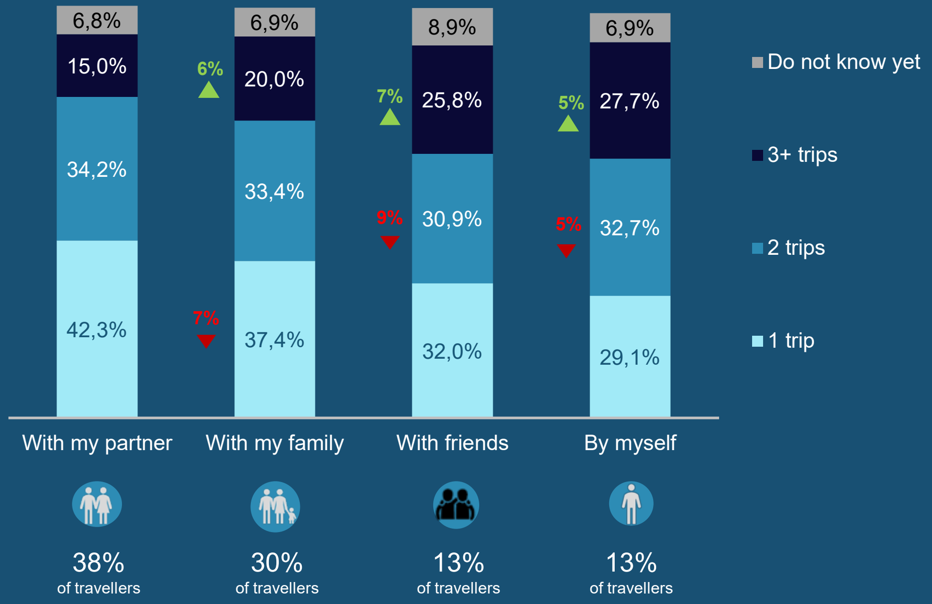
36% of Europeans plan to travel once by March 2024 (-5% vs a year ago); taking three or more trips is up by 5% - mainly among Europeans travelling solo or with their friends

Number of intended trips within Europe in the next six months



Sept '23 survey

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



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

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

No. of respondents: 4,052

Interest in train and bus travel (17%) increases; these transport options serve as a green alternative to driving, which drops by 7% compared to a year ago

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

Spain
76.1% ▲ 5%*

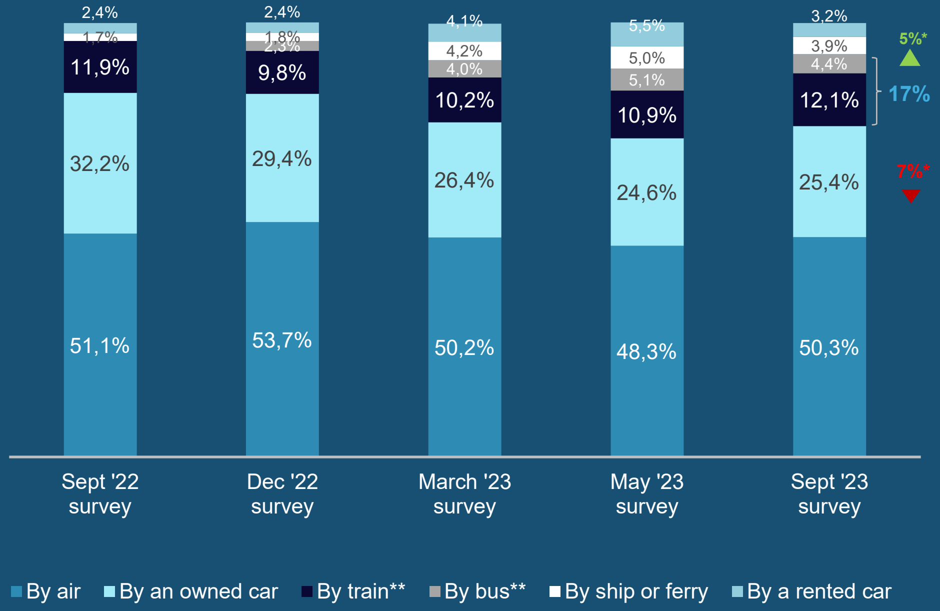
UK
71.3% ▲ 5%*

Italy
68.6% ▲ 3%*

France
49.4% ▼ 8%*

Poland
45.9% ▼ 5%*

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

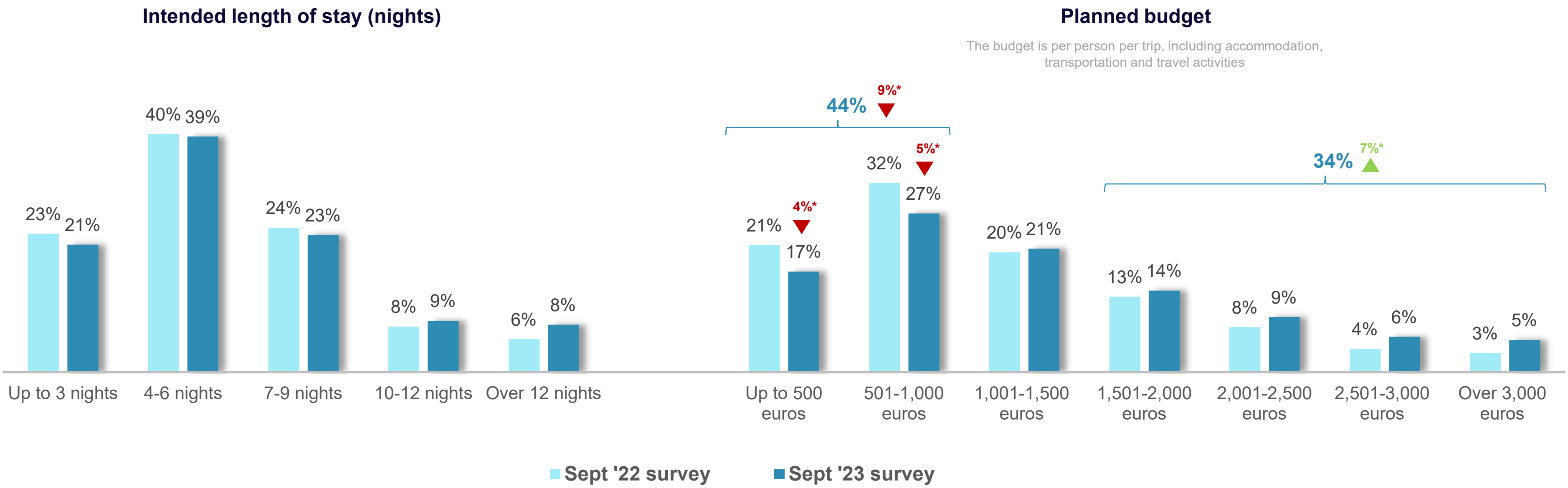


*Statistically significant difference vs a year ago (Sept 2022)
**Up to September '22, 'By train/bus' was recorded as one answer

No. of respondents: 4,052

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

The anticipated duration of holidays remains the same while spending increases: more travellers are budgeting over 1,500 euros per trip, while budgets of up to 1,000 euros are on the decline



TRAVELLERS IN ORGANISED GROUPS AND FOR BUSINESS PURPOSES SPEND MORE

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

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

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

No. of respondents: 4,052

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	39%	14%	7%
501 - 1,000 euros	34%	34%	23%
1,001 - 1,500 euros	12%	25%	24%
1,501 - 2,000 euros	6%	12%	19%
2,001 - 2,500 euros	3%	7%	14%

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

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

No. of respondents: 4,165

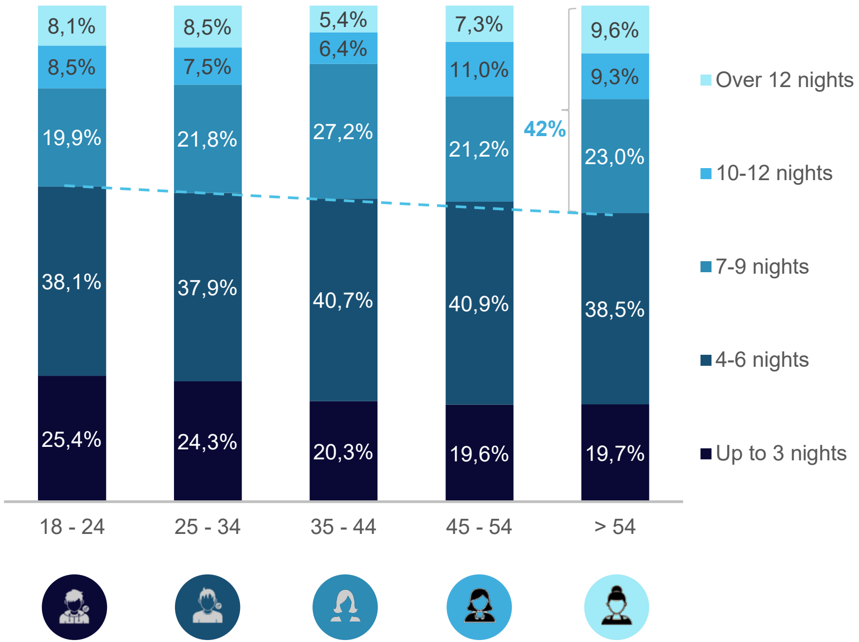
Q17. What would be the length of your next overnight trip?

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

The mature travellers are the ones envisaging longer stays

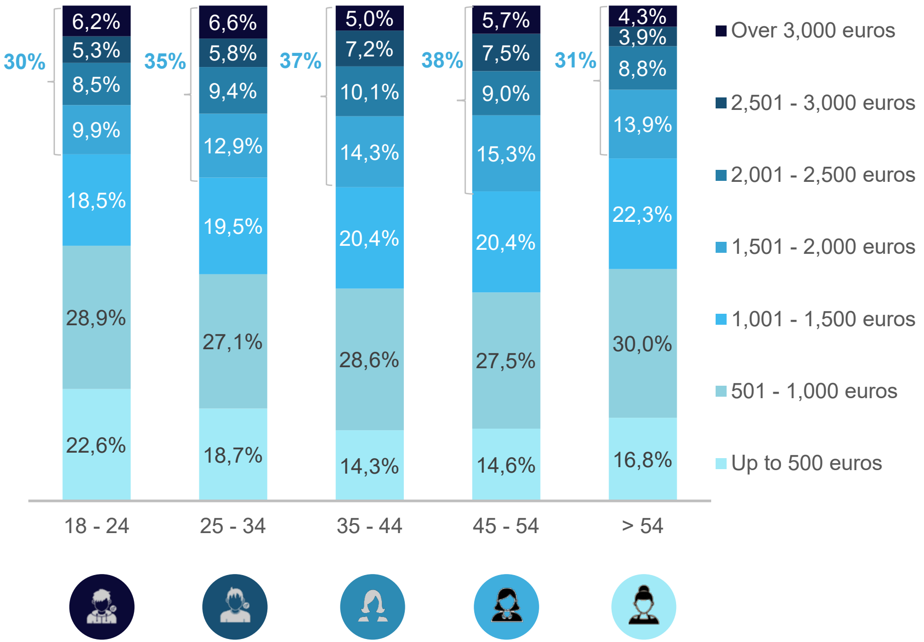
Europeans aged 25-54 are more likely to spend over 1,500 euros on their trip

Intended length of stay (nights)



Envisaged budget

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



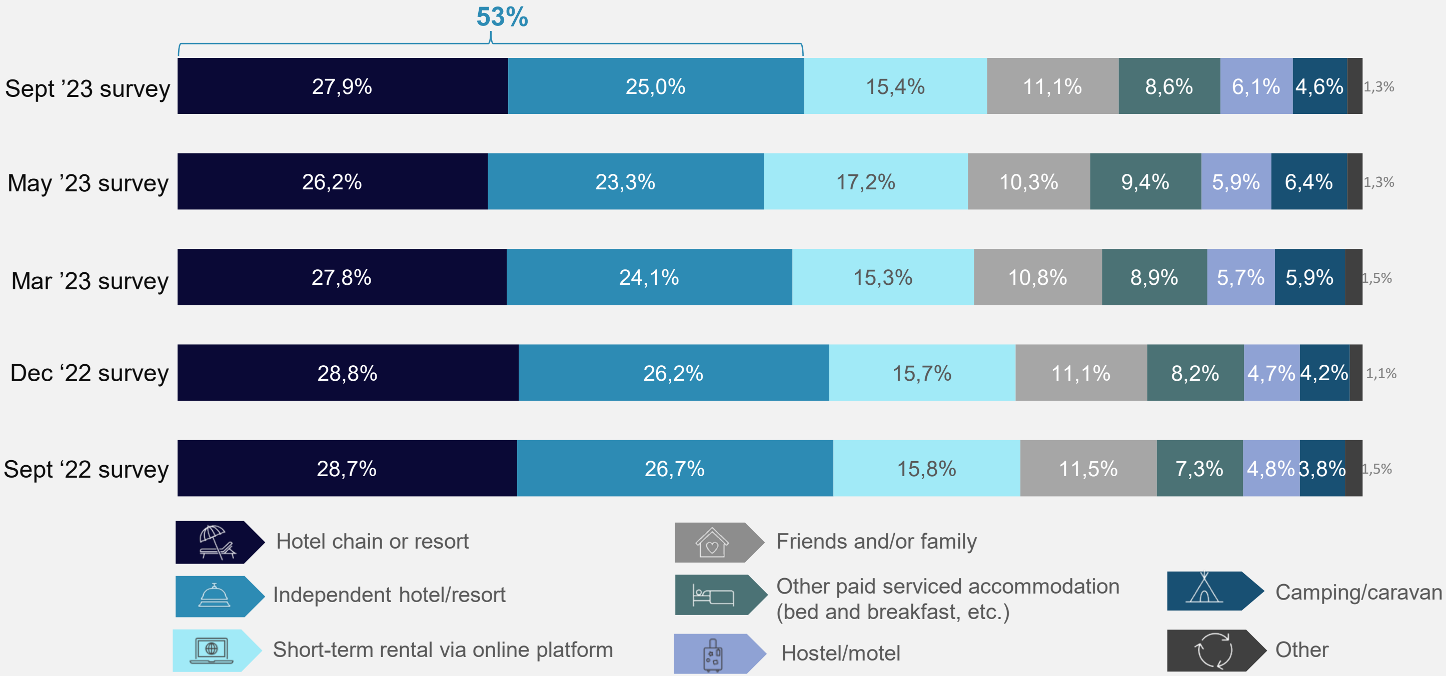
Q17. What would be the length of your next overnight trip?

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

No. of respondents: 4,052

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

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



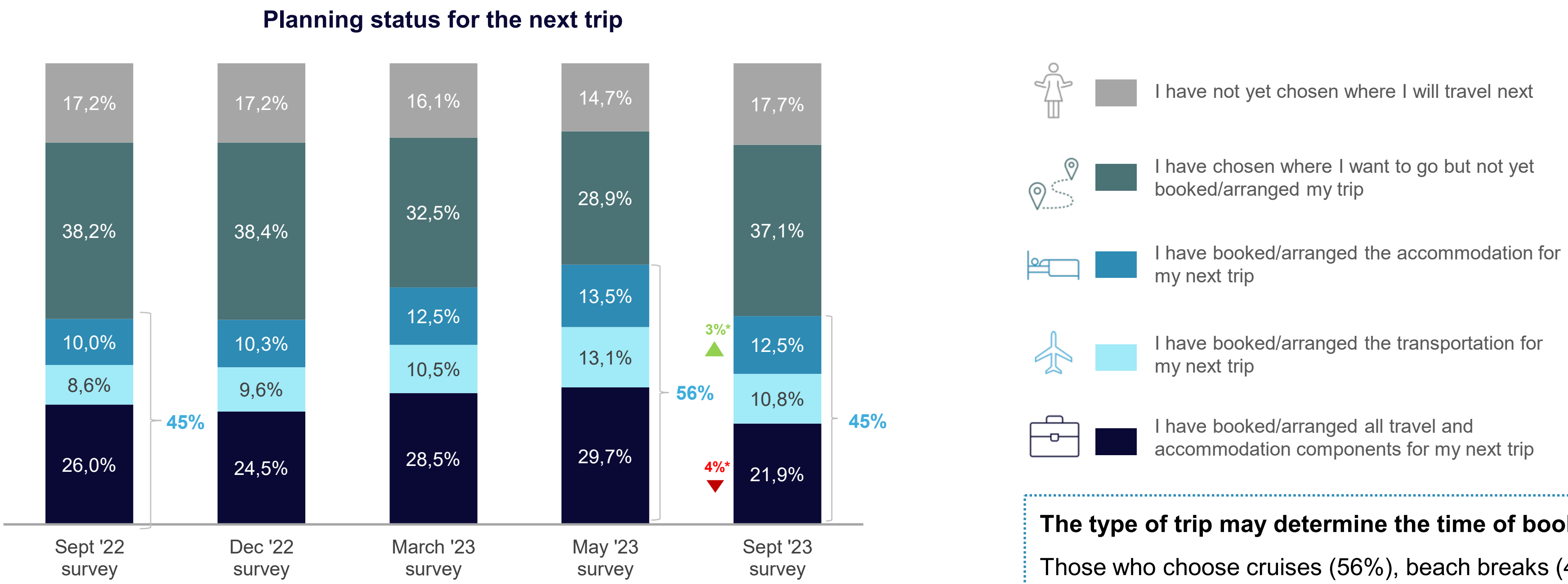
Travellers staying in hotels are more likely to **visit famous landmarks** (39% vs 29%), **experience the local culture** (40% vs 31%), and learn about the destination's **culture and history** (35% vs 28%), compared to non-hotel guests

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

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

No. of respondents: 4,052

45% of travellers have already partially or fully booked their next trip - same as last year and down by 11% compared to the pre-summer booking rush



The type of trip may determine the time of booking

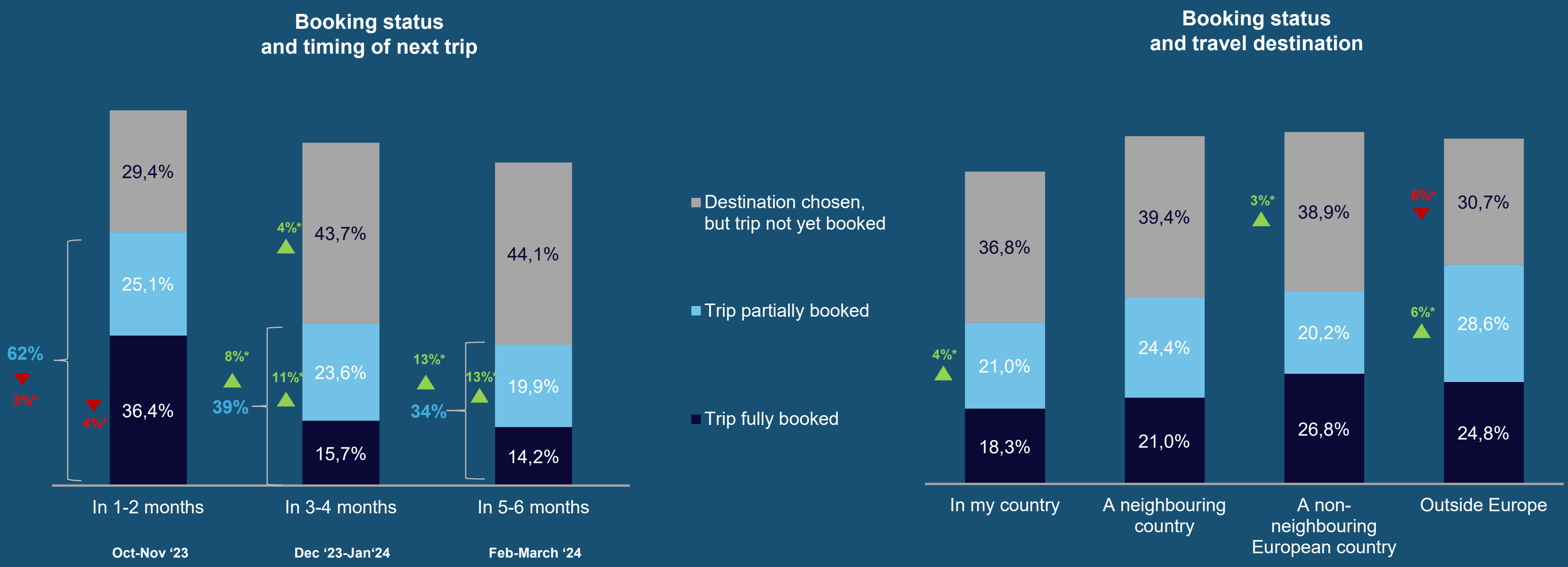
Those who choose cruises (56%), beach breaks (44%) and wellness trips (44%) are more likely to book ahead, compared to holiday makers who prefer culture and heritage (37%) or city breaks (38%).

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

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

No. of respondents: 4,052

Trip bookings for December - January (+8%) and February-March (+13%) surge, perhaps due to increased interest in early-bird deals



Sept '23 survey

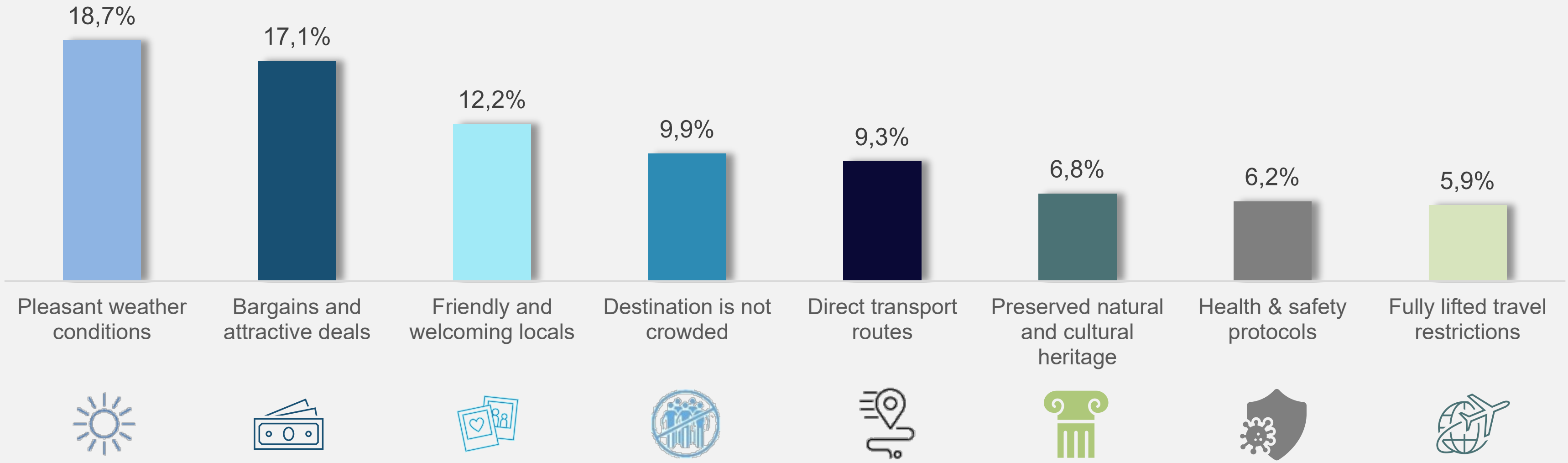
Q21. Please select a response which best describes the planning for your next trip:

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

No. of respondents: 4,052

Pleasant weather, good deals and friendly locals are still top criteria for Europeans choosing a travel destination

Top 8 criteria for choosing the next travel destination



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

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

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

No. of respondents: 5,993

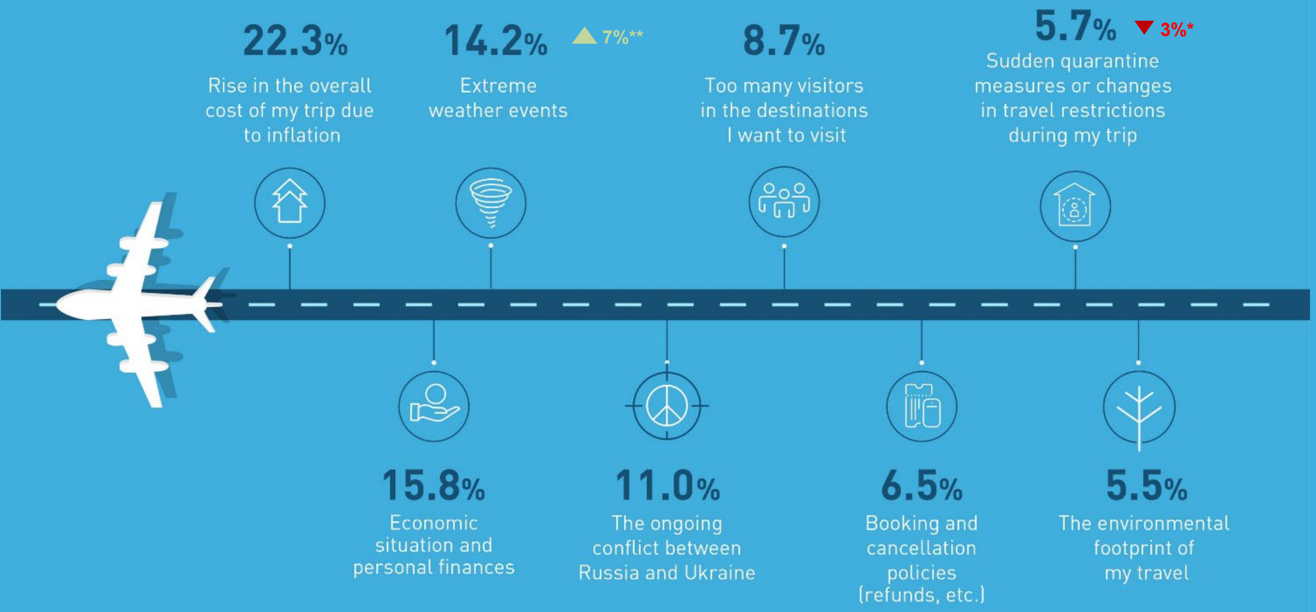
TRAVEL CONCERNS

03

WHAT DO EUROPEAN TRAVELLERS WORRY ABOUT?

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

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



Top 4 markets concerned with rising travel costs	Top 4 markets concerned with personal finances
Poland 27%	Poland 17%
Spain 24%	UK 17%
Italy 24%	Spain 16%
France 24%	Belgium 16%

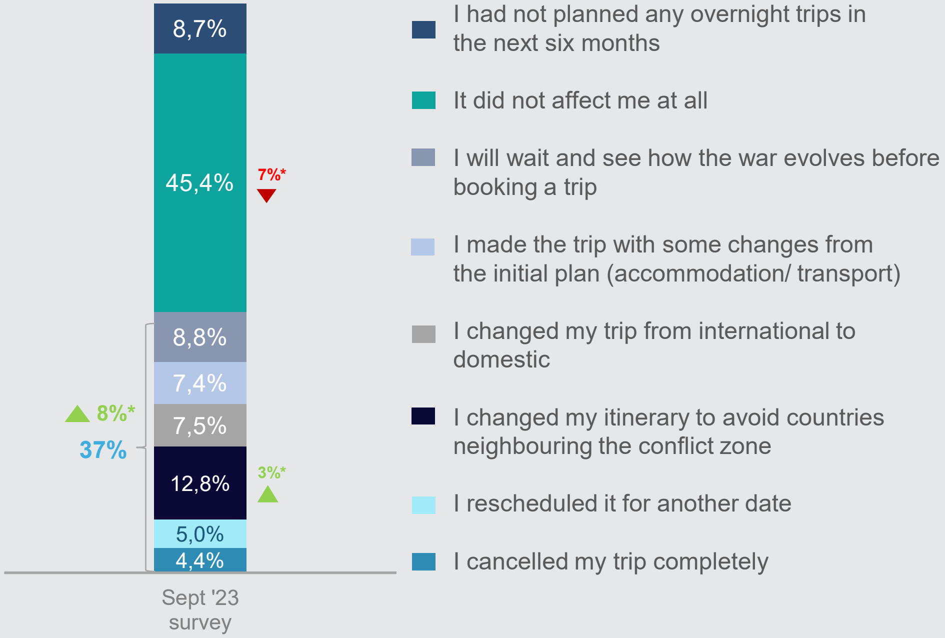
Q4. What currently concerns you the most about travelling within Europe?

* Statistically significant difference vs a year ago (Sept 2022)
** Statistically significant difference vs the pre-summer period (May 2023)

No. of respondents: 4,052

The effect of the ongoing war in Ukraine on the travel plans of Europeans increases (+8%), and a considerable 13% have avoided countries neighbouring the conflict zone (+3%)

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



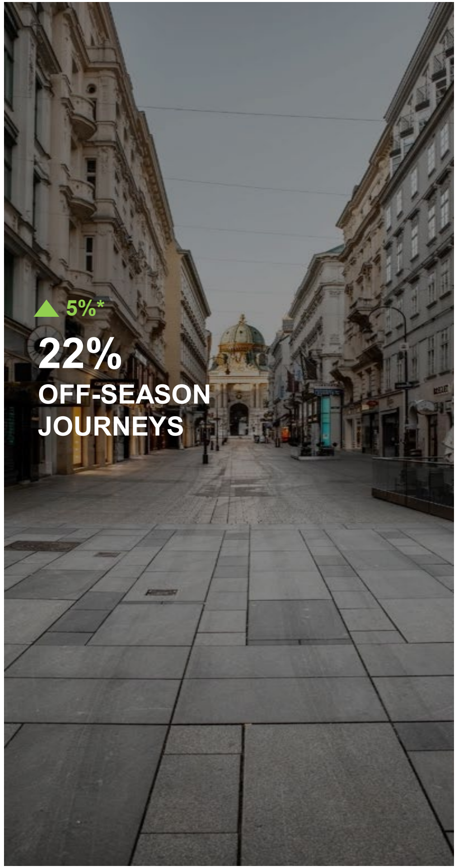
Top 5 markets changing their travel plans		Most often mentioned change: 'I changed my itinerary to avoid countries neighbouring the conflict zone'
	**Poland** 46.4%	15%
	**Italy** 44.5%	19%
	**Germany** 40.2%	15%
	**Switzerland** 39.8%	12%
	**Austria** 38.1%	13%

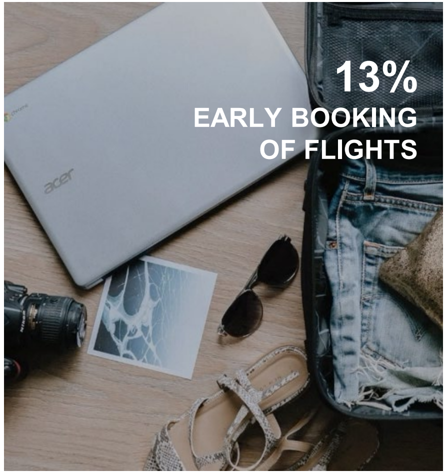
* Statistically significant difference vs a year ago (Sept 2022)

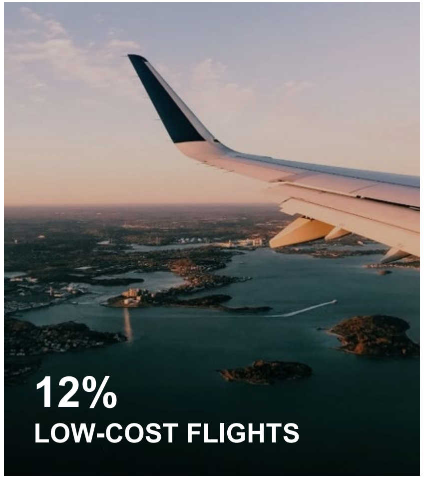
Q2. How has the ongoing war between Russia and Ukraine affected your plans to travel within Europe in the next 6 months?

No. of respondents: 5,993

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





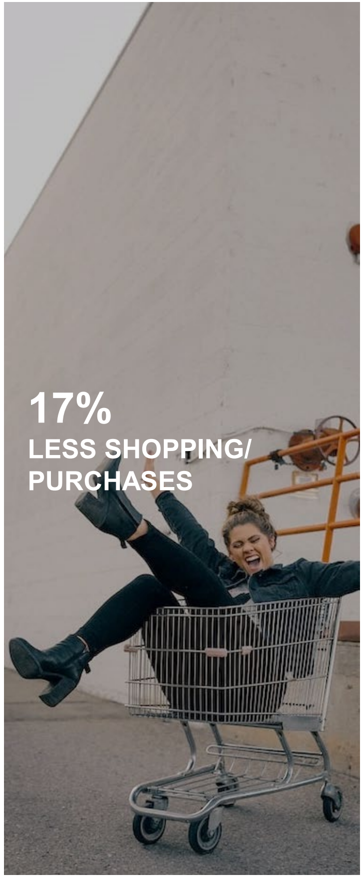


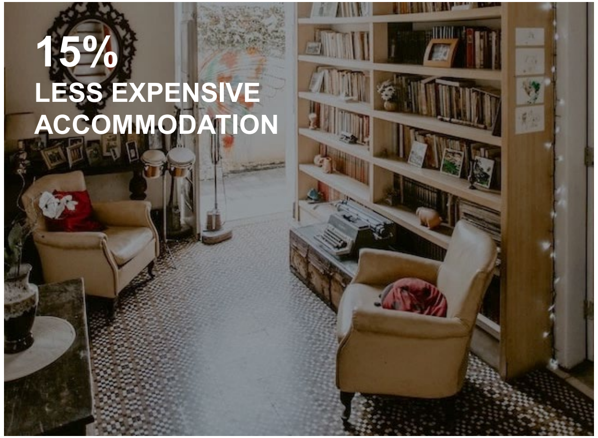
Q19. In the context of inflation and rising travel costs, which of the following travel behaviours are you most likely to adopt before reaching your next destination?

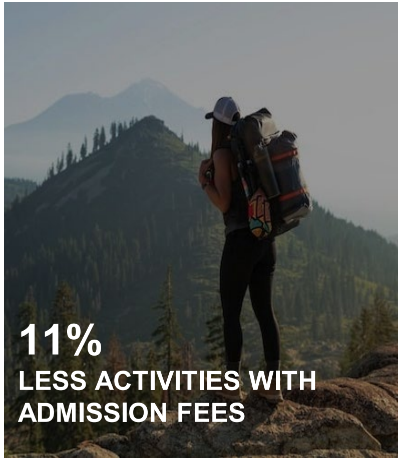
* Statistically significant difference vs May 2023

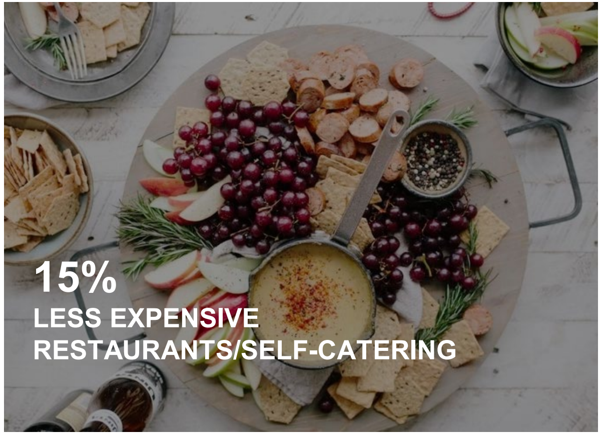
No. of respondents: 4,052

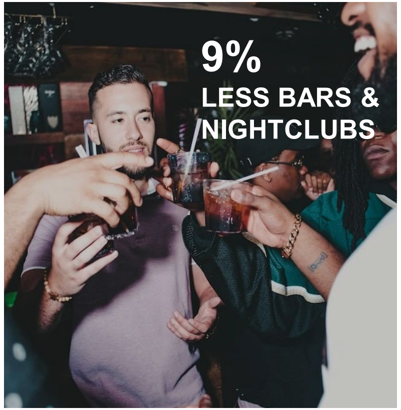
THE IN-DESTINATION BEHAVIOR IS CHANGING TOO
TO FIT WITHIN THE AVAILABLE BUDGET









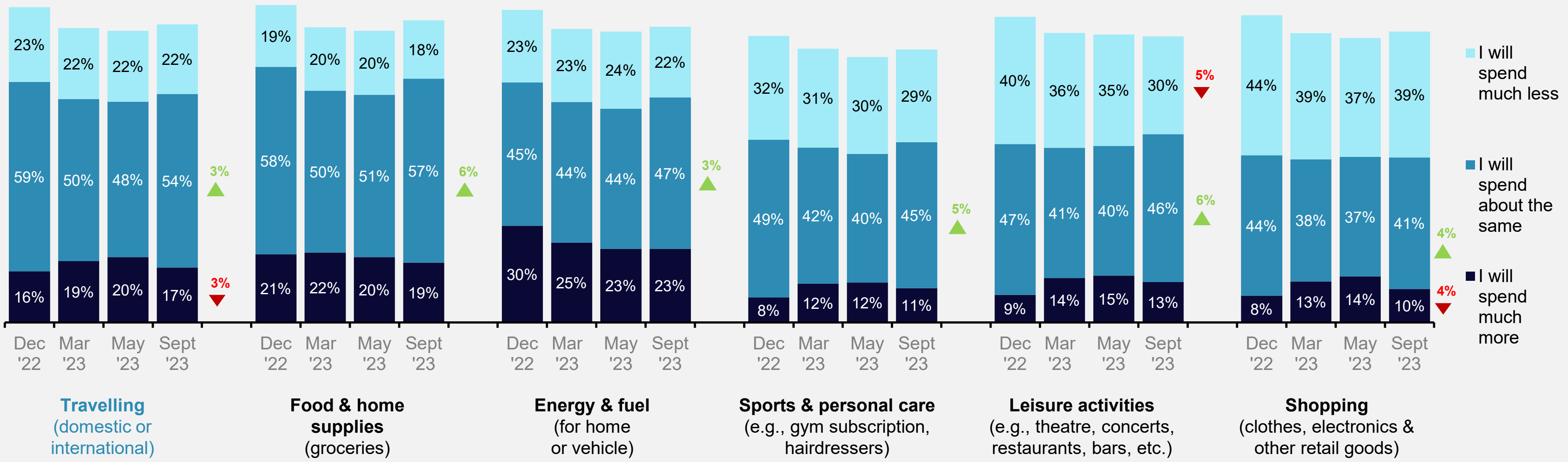


Q20. In the context of inflation and rising costs of travel, which of the following travel behaviours are you most likely to adopt during your next vacation?

No. of respondents: 4,052

Travel remains a key necessity in Europeans' life: 54% of the respondents aim to maintain a similar travel budget in the next months, while 17% intend to increase it

Anticipated changes in spending, in the coming six months



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

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

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

No. of respondents: 5,993

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 13**: 13-23 September 2022; sample = 5,988 / **Wave 14**: 15-29 December 2022; sample = 6,000 / **Wave 15**: 1-7 March 2023; sample = 6,000 / **Wave 16**: 8 May-4 June 2023; sample = 6,002 / **Wave 17**: 11 -26 September 2023; sample = 5,993
  - **Countries**: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - **Languages**: English, French, German, Italian, Spanish, Polish and Dutch
- **Research themes examined**: travel personas (one question), travel concerns and impact of external shocks on travel (8 questions), and travel intentions, preferences and trip planning (13 questions)
- 47% of the Wave 17 survey respondents are male and 53% are female. Sample size and age groups are listed below:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	70	44	88	96	92	56	79	81	87	**781**
	25 - 34	136	112	73	143	128	152	106	129	133	139	**1,251**
	35 - 44	126	134	103	115	140	150	120	82	105	93	**1,168**
	45 - 54	138	168	105	76	146	168	92	111	103	84	**1,191**
	≥55	262	266	175	78	240	188	126	99	71	97	**1,602**
Total		**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**493**	**500**	**5,993**

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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MINDHAUS
Tourism Marketing Strategy

EUROPEAN TRAVEL COMMISSION

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