MONITORING SENTIMENT FOR INTRA-EUROPEAN TRAVEL

Travel horizon: May 2024 – October 2024 | Wave 18th

EUROPEAN
TRAVEL
COMMISSION

Co-funded by the European Union

WAVE 18 RESEARCH HIGHLIGHTS

TRAVEL INTENTIONS

This report monitors sentiment and short-term plans for domestic and intra-European travel and is the **18th wave of a market research project**[1] which began in September 2020. The findings are drawn from data collected in April 2024 from individuals across 10 key European markets.

- 75% of Europeans plan to travel between May and October 2024, representing an increase of 3% compared to last year. Europeans over the age of 55 share the strongest travel sentiment (81%).
- Most Europeans plan to take at least one trip within the region (60%), and July and August are the most popular months (44%).
- As summer approaches, Europeans are increasingly drawn to Sun & Beach holidays (20%) and City Break trips (16%). Their most desired travel experiences include enjoying scenic beauties (19%), savouring local cuisine (17%), engaging with local cultures (15%), and admiring famous landmarks (15%).
- With the upcoming summer season, the desire for leisure travel rises to 74% (a 5% increase over summer 2023), while interest in business travel declines by 3%, reaching 12%.

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[1] The data collection and research methodology are detailed in the methodological annex (slide 48)

WAVE 18 RESEARCH HIGHLIGHTS

TRIP PLANNING

- 57% of Europeans plan multiple trips in the coming six months. Solo travellers (61%) and those travelling with their friends (58%) are the most likely to take two trips or more.
- Over half of travellers (52%) have already fully or partially booked their next trip. A significant 35% have chosen their destination but have not made any arrangements yet.
- 55% are choosing to fly to their next destination, marking a 5% increase compared to the same period last year. This figure represents the highest level since 2020. Meanwhile, the eco-friendlier options, like train or bus, are preferred by 13% of respondents.
- In terms of accommodation, hotels, being part of a chain or independent, remain the top choice for 56% of Europeans. Short-term rentals follow and maintain another significant market share (17%).
- In a turbulent world, safety (16%) is the foremost criterion for Europeans when selecting a travel destination, followed by pleasant weather (13%). Attractive deals (11%) and cost of living at the destination (8%) are also significant factors for European travellers to consider.
- The key digital tools for trip planning are search engines (23%), travel websites (21%) and online maps (16%). Despite the hype, the share of Europeans using generative AI tools and AI-based apps for trip planning is currently only 4%.

WAVE 18
RESEARCH HIGHLIGHTS

- High inflation (22%) and personal financial situations (17%) continue to be the primary concerns for Europeans. Worries about the conflicts in Ukraine (12%) and the Middle East (10%) follow.
- To manage increasing travel costs, Europeans are adopting several strategies, including opting for off-season trips (17%), selecting more budget-friendly destinations (13%), and booking trips well in advance (12%). Additionally, while at their destination, travellers are cutting back on shopping (19%), choosing more affordable accommodation options (15%), and dining at less expensive restaurants (15%).
- 74% of Europeans adapt their travel behaviour to the climate crisis, mainly by avoiding extreme temperatures (17%), seeking destinations with more stable weather conditions (15%), and monitoring weather forecasts (15%) before finalising plans.

WAVE 18
RECOMMENDATIONS FOR DESTINATIONS

- Europeans aged over 55 are the keenest to travel during this spring and summer. Destinations aiming to attract this group should promote Culture & Heritage (35%), Coast & Sea (30%), and Nature & Outdoors (29%) trips, which they recognise as most attractive.
- Safety is a top priority for Europeans. Destinations with a strong reputation for safety (as evidenced by other visitors) or proactive measures should emphasise this in their messaging. Safety is particularly important for a third of travellers over the age of 55.

WAVE 18

RECOMMENDATIONS FOR DESTINATIONS

- Compared to other travellers, Sun & Beach travellers cite more often worries about high trip costs (52%) and personal finances (37%). This is a prime opportunity for affordable accommodation providers, travel agencies, and budget-conscious destinations to promote their value-for-money proposition, offering travellers the opportunity to enjoy the summer sun without breaking the bank.

- Nearly half (48%) of Europeans have not yet booked their next trip. People over the age of 55 and those looking for city breaks are among the least decisive, with 61% and 57%, respectively, yet to book. Destinations and businesses seeking to attract more travellers and maximise revenue should focus their marketing efforts on these two groups.

- With financial worries persisting, Europeans are trying to limit costs at the destination. Restaurants and cafes can offer and promote fixed-price set menus – or even pre-packed picnic baskets for travellers who prefer self-catering.

CONTENTS

Reading the data

Wave 18

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

	Wave 14	Wave 15	Wave 16	Wave 17	Wave 18
Survey dates	15-29 Dec ‘22	1-7 March ‘23	8 May-4 June ’23*	11-26 Sept ‘23	2-17 April ‘24

2. **To present Wave 18 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:	May-June 2024
In 3-4 months:	July-August 2024
In 5-6 months:	September-October 2024

3. **To present data and insights, the following distinct groups have been analysed:**
   - Total respondents: 5,859
   - Respondents most likely to travel in the next 6 months: 4,419
   - Respondents planning to travel internationally within Europe (not necessarily in the next 6 months): 4,583

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 for Wave 18 was conducted prior to Iran's attack on Israel on April 13th, 2024

TRAVEL PLANS

01

European travel intentions surge: a 3% increase in planned trips between May and October 2024

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

Italy

81.6%

UK

78.4%

4% ▼

Spain

80.2%

Netherlands

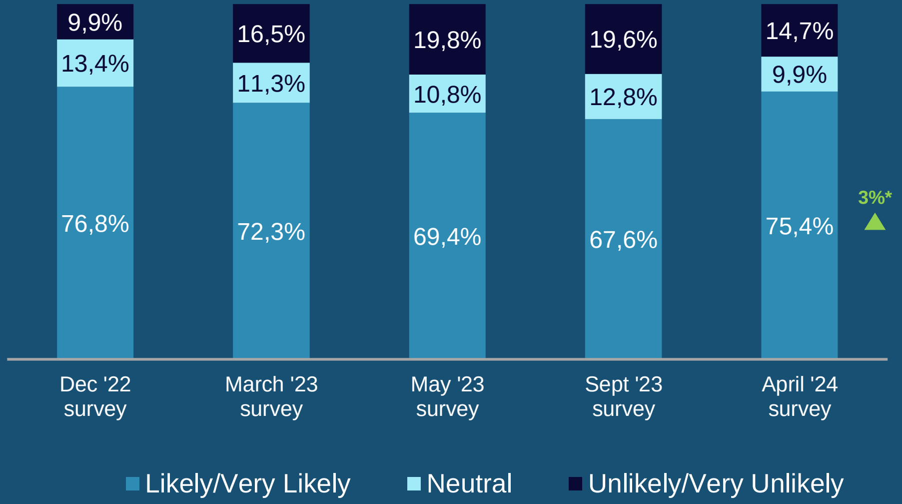
76.2%

Poland

79.4%

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

Intention to travel in the next six months

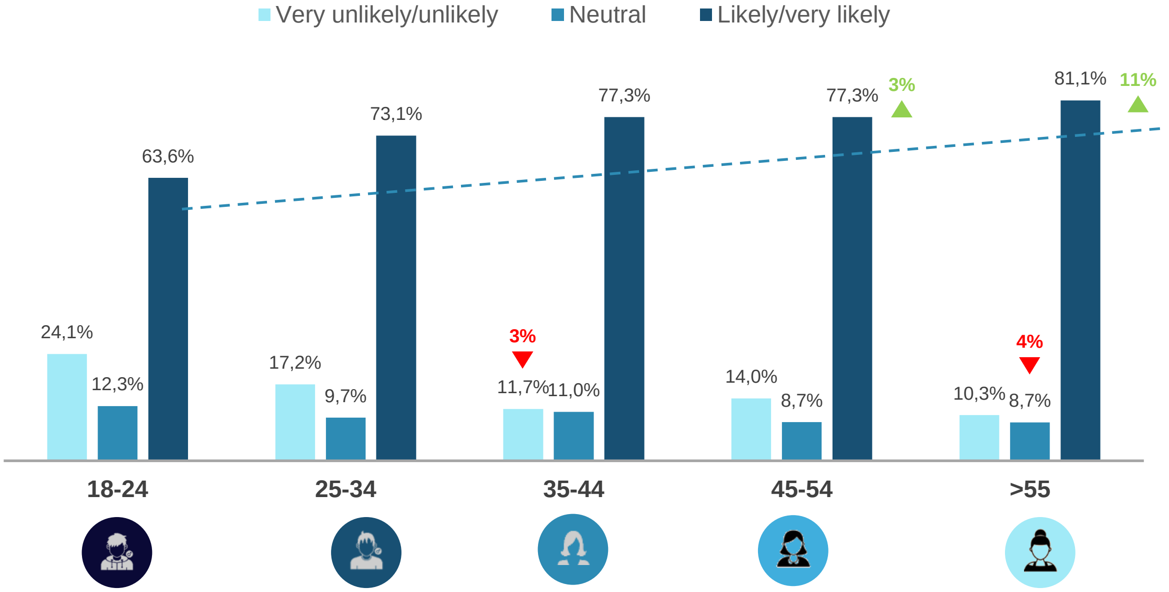


* Statistically significant difference vs a year ago (March 2023)

No. of respondents: 5,859

Travel sentiment for this spring and summer is higher among those aged 35+. 4 out of 5 Europeans over the age of 55 plan to travel (+11%)

Intention to travel in the next six months by age group

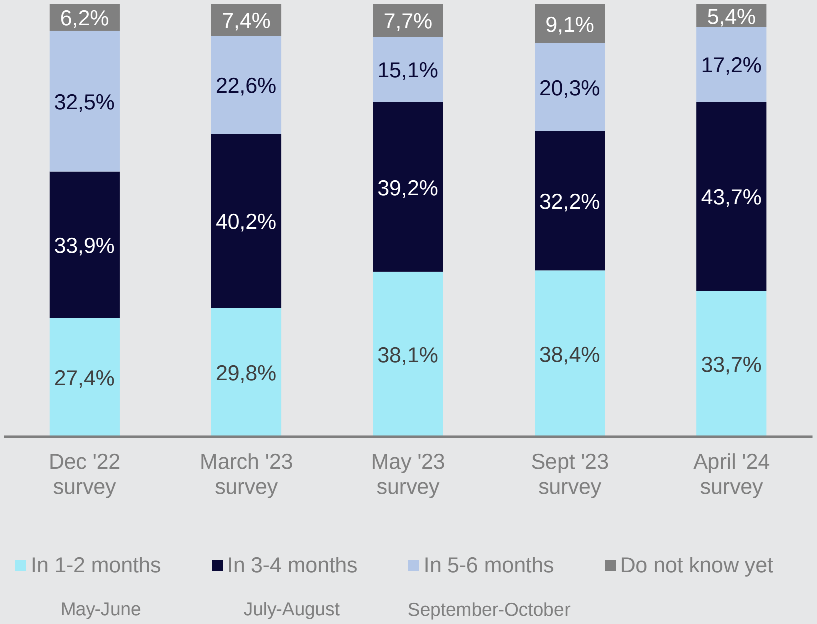


* Statistically significant difference vs a year ago (March 2023)

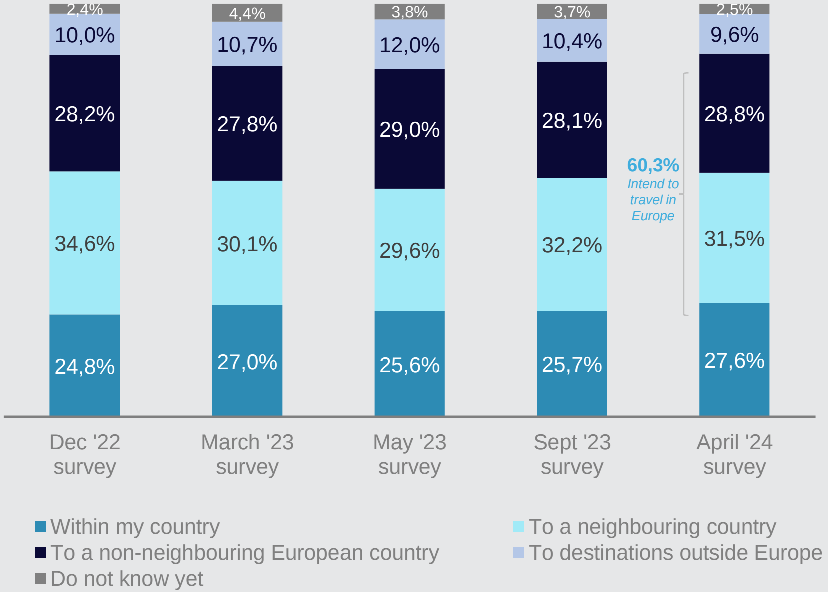
Q8. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?
Q6. What criteria will play the most important role in choosing your next holiday destination?

60% of Europeans are planning to travel within Europe.
July and August are the preferred travel months for a large share (44%) of them

When will Europeans travel next?



Where will Europeans travel within the next 6 months?



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

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

No. of respondents: 4,419

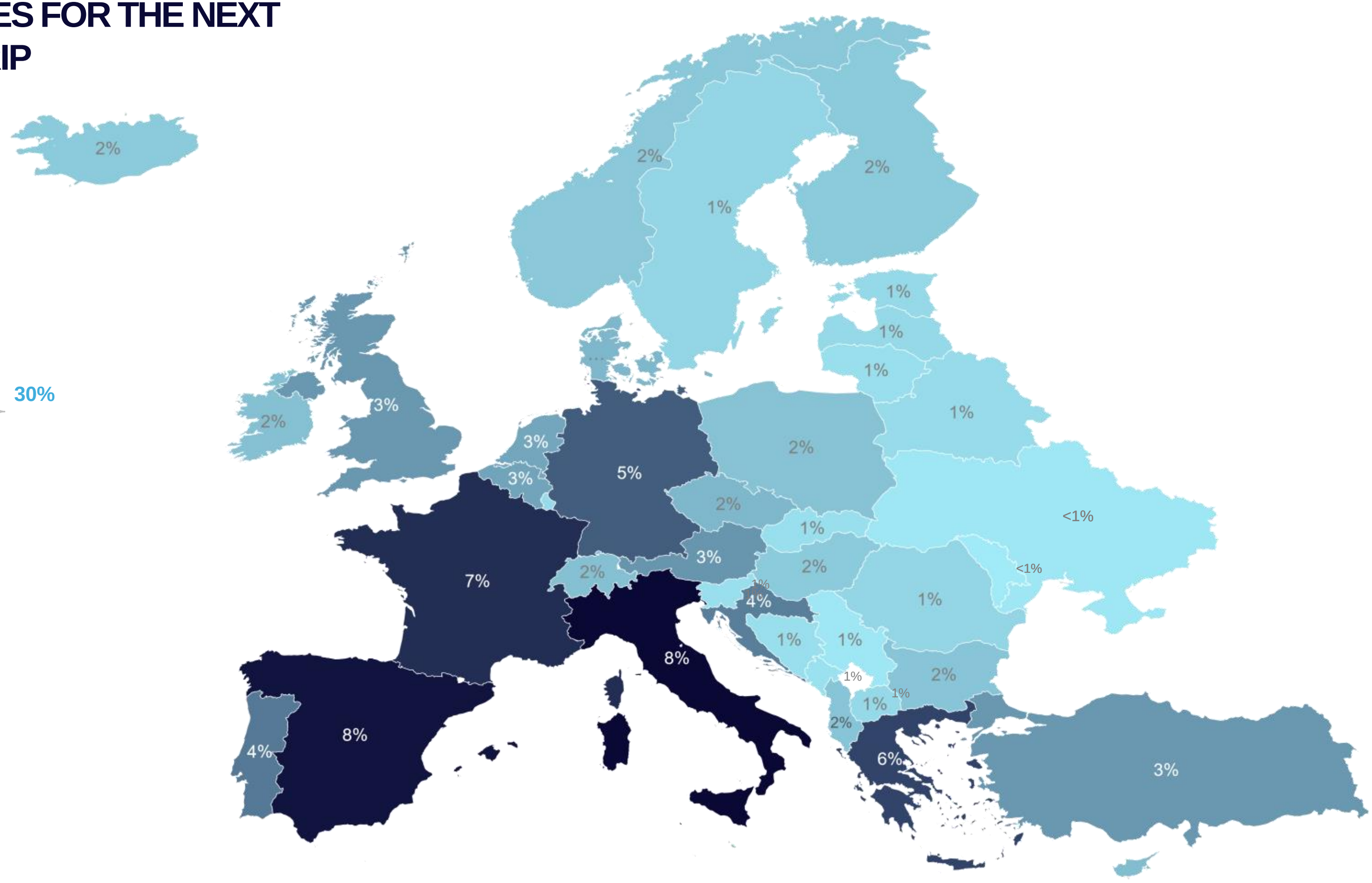
PREFERRED COUNTRIES FOR THE NEXT INTRA – EUROPEAN TRIP

April '24 survey

TOP 10 COUNTRIES

Italy	8,4%
Spain	8,1%
France	7,1%
Greece	6,3%
Germany	5,4%
Portugal	4,4%
Croatia	4,2%
Austria	3,4%
United Kingdom	3,3%
Türkiye	3,0%

30%



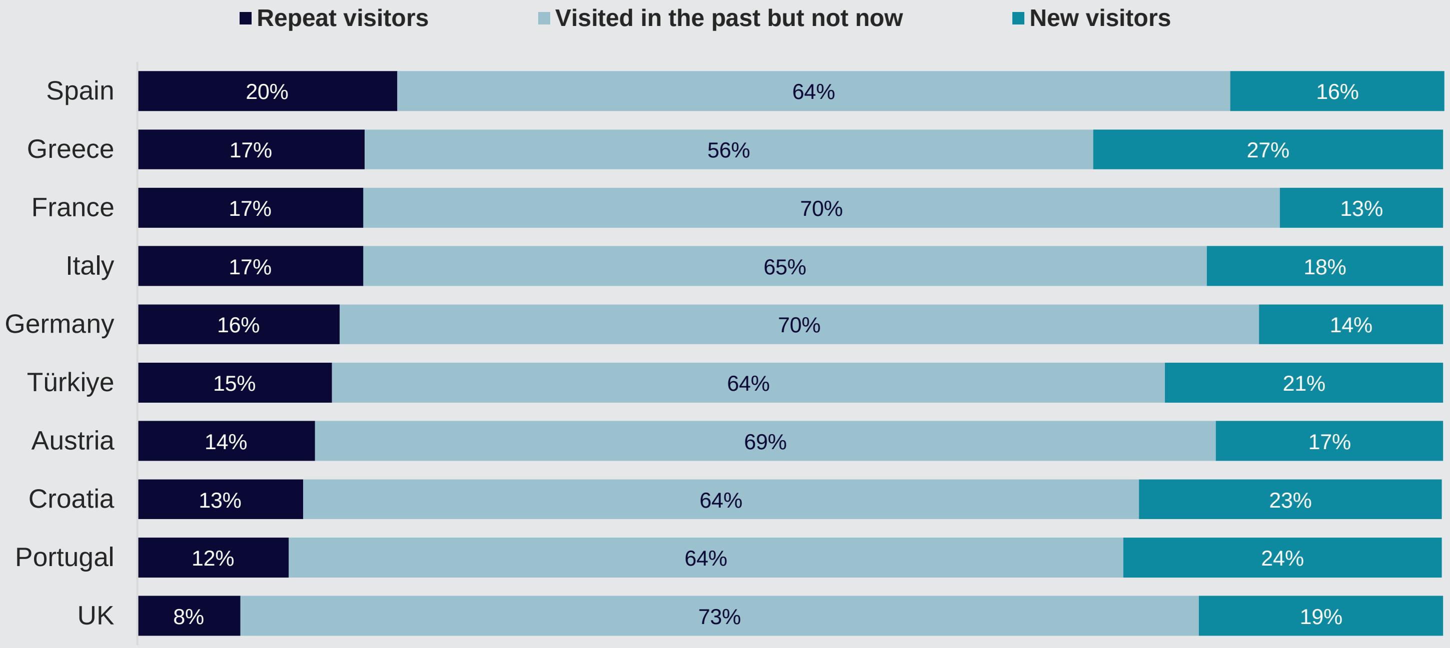
* Please use this map as a reference only

No. of respondents: 4,583

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

Spain attracts the highest number of repeat visitors, followed by Greece, Italy and France. Greece, Portugal and Croatia will host more new visitors than other destinations this spring and summer.

Destination focus: past and future visitors per destination (top-10 destinations)



Total No. of cases: 7,188

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

NOTE: The sample includes respondents with past experience or future intentions to visit the destinations. It excludes domestic travellers.

Most Europeans plan leisure trips over the next months, while sentiment for business trips remains sluggish

Top 3 markets to take a leisure trip

Spain

82.5% 10% ▲

Italy

81.5%

France

80.1%

Top 3 markets to take a business trip

Austria

11.9%

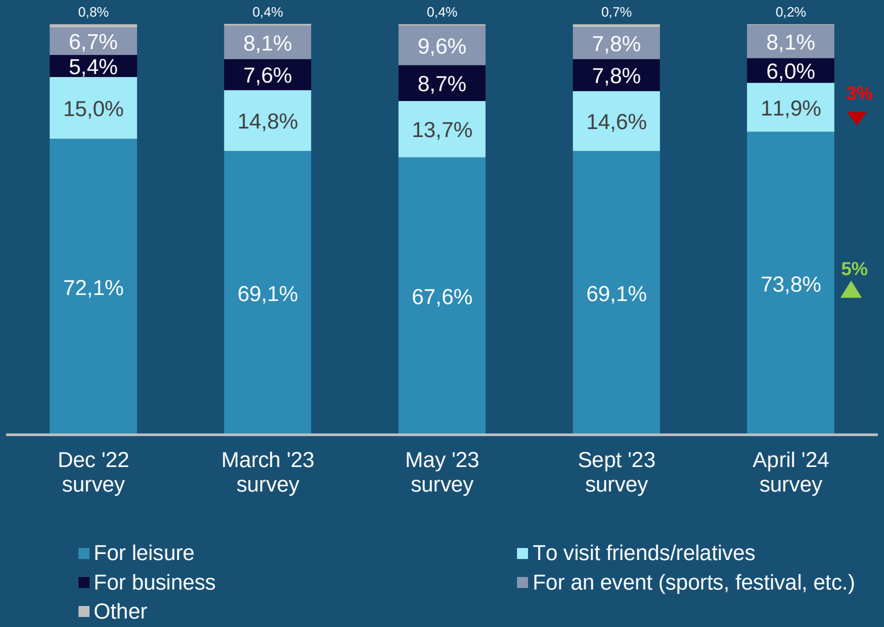
Netherlands

10.9%

Switzerland

7.3% 11% ▼

Purpose of travel for respondents most likely to travel in the next six 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 (March 2023)

No. of respondents: 4,419

As summer draws near, Europeans' desire for Sun & Beach trips prevails. City Breaks and Cultural trips follow. Travellers look forward to enjoying the nature, gastronomy and culture of European destinations

Preferred type of leisure trip in the next six months

Preferred type of experiences in the next six 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?

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

No. of respondents: 4,419

POPULAR TYPE OF TRIPS AND EXPERIENCES

Travel horizon: May 2024-October 2024

	Sun & Beach	City Break	Culture & Heritage	Nature & Outdoors
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	**27%** >55 **20%** 45-54	**26%** >55 **25%** 25-34	**37%** >55 **23%** 45-54	**30%** >55 **21%** 35-44
MOST COMMON LENGTH OF STAY & BUDGET	**33%** 7-9 nights **27%** 500-1000 € **25%** 4-6 nights **24%** 1001-1500 €	**49%** 4-6 nights **35%** 500-1000 € **30%** Up to 3 nights **21%** Up to 500 €	**45%** 4-6 nights **26%** 500-1000 € **24%** 7-9 nights **24%** 1001-1500 €	**37%** 4-6 nights **32%** 500-1000 € **22%** 7-9 nights **20%** 1001-1500 €
TOP 4 EXPERIENCES TO TRY	**20%** Enjoy natural landscapes **19%** Gastronomic experiences **14%** Dive into local culture **14%** Sightseeing	**20%** Sightseeing **18%** Dive into local culture **17%** Gastronomic experiences **15%** Learn about history	**22%** Learn about history **18%** Sightseeing **18%** Dive into local culture **15%** Gastronomic experiences	**28%** Enjoy natural landscapes **15%** Gastronomic experiences **14%** 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

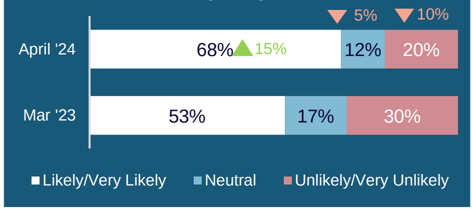
No. of respondents: 4,419

SNAPSHOT: AUSTRIAN TRAVEL PLANS

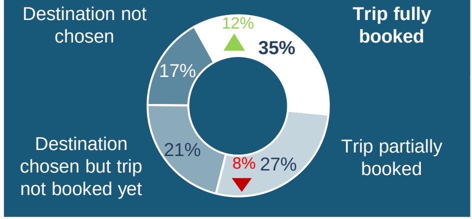
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

42%	34%	15%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

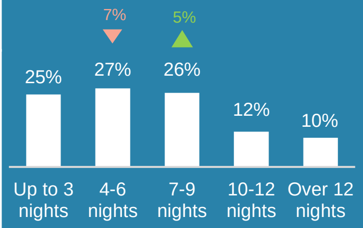
WHERE TO?

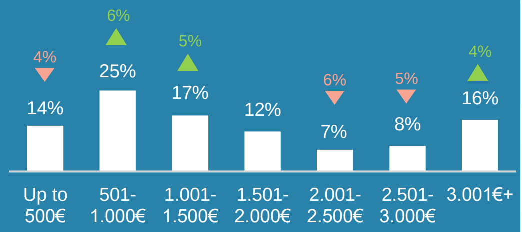
- NEIGHBOURING COUNTRY 35% ▲ 9%
- NON-NEIGHBOURING COUNTRY 28% ▼ 5%
- WITHIN MY COUNTRY 21%
- OUTSIDE EUROPE 10% ▼ 8%

TRAVELLING WITH?

- **35%** with partner ▲ 12%
- 30% with family ▲ 7%
- 12% solo

INTENDED LENGTH OF STAY AND BUDGET





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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach **20%**
- City Break **13%**
- Nature & Outdoors **13%**

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Italy	12% ▲ 6%	13%
Germany	9% ▲ 4%	10%
France	7%	8%
Croatia	6%	2%
Greece	5%	5%

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

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

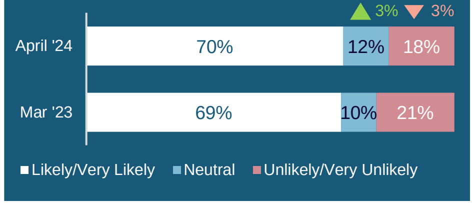
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: BELGIAN TRAVEL PLANS

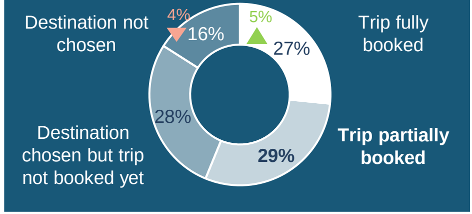
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

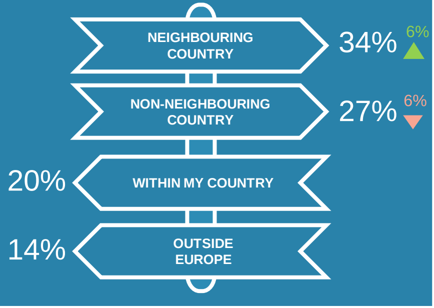


POPULAR TRAVEL PERIODS

26%	40%	22%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

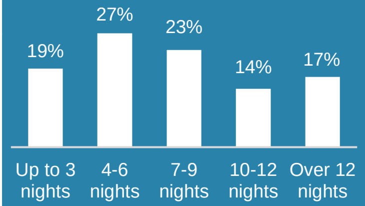
WHERE TO?

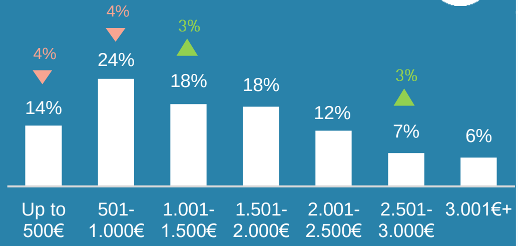


TRAVELLING WITH?

33% with partner	30% with family 5% ▼	13% solo 5%* ▲

INTENDED LENGTH OF STAY AND BUDGET





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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach

20%

Nature & Outdoors

18%

Coast & Sea

12%

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
France	16%	6%
Spain	9%	4%
Italy	8%	4%
Netherlands	6%	4%
Germany	5%	4%

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

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

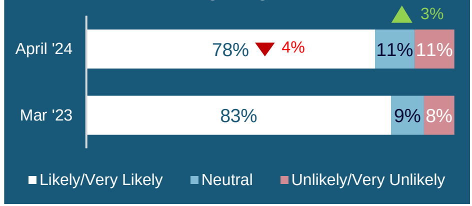
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: BRITISH TRAVEL PLANS

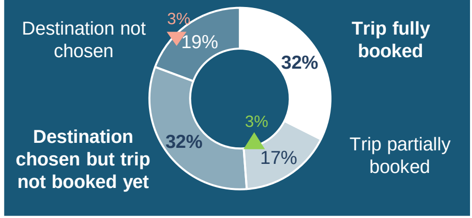
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

33%	35%	18%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

WHERE TO?

ANOTHER EUROPEAN COUNTRY 55%

WITHIN MY COUNTRY 28%

OUTSIDE EUROPE 12%

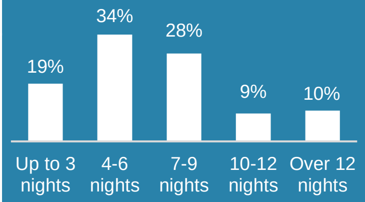
TRAVELLING WITH?

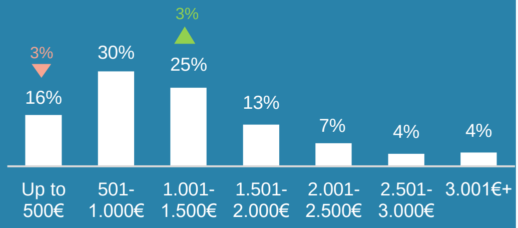
35% with partner

33% ▼ 7%* with family

16% solo

INTENDED LENGTH OF STAY AND BUDGET





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%** 3% ▼

City Break **23%** 3% ▲

Coast & Sea **10%**

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Spain	14%	14%
Italy	8%	8%
Greece	7%	6%
France	7% ▼ 5%	9%
Portugal	6%	4%

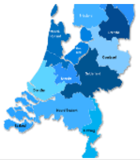
*** Significant increase ▲ or decrease ▼ vs the same time last year**

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

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

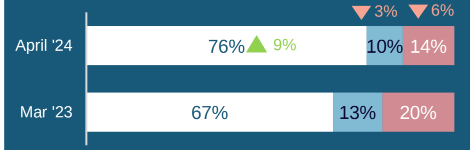
SNAPSHOT: DUTCH TRAVEL PLANS

Travel horizon: May 2024-October 2024



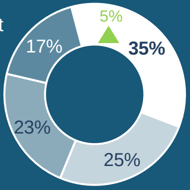
TRAVEL SENTIMENT

INTENTION TO TRAVEL



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

TRAVEL READINESS



Destination not chosen

Trip fully booked

Destination chosen but trip not booked yet

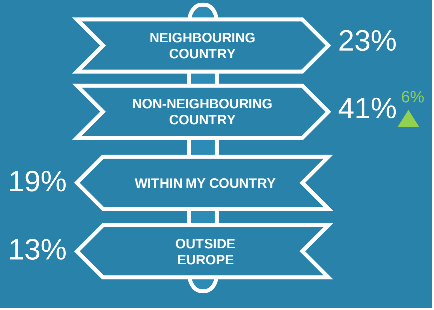
Trip partially booked

POPULAR TRAVEL PERIODS

36%	37%	17%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

WHERE TO?



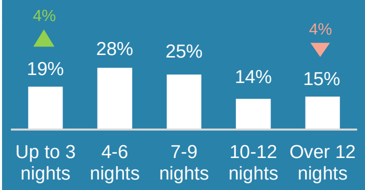
TRAVELLING WITH?

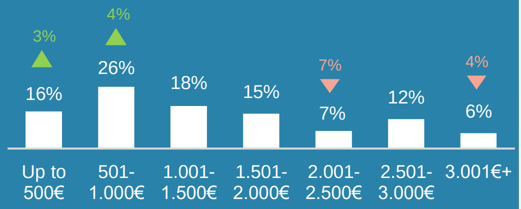
34% with partner 4% ▲

25% with family 7% ▼

10% solo

INTENDED LENGTH OF STAY AND BUDGET





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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach

20%

Nature & Outdoors

19% 3% ▲

City Break

17%

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Spain	10%	5%
Germany	10%	7%
France	7%	4%
Belgium	6%	5%
Italy	6%	4%

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

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

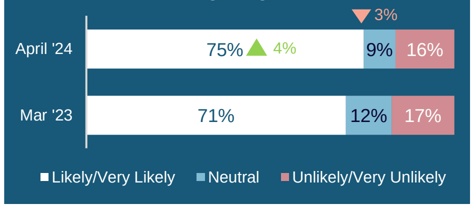
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: FRENCH TRAVEL PLANS

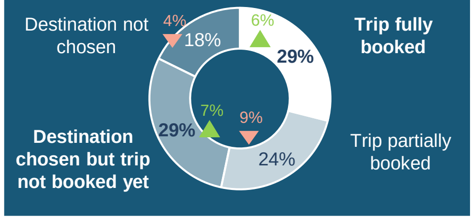
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

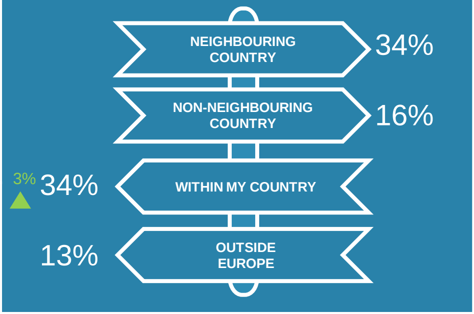


POPULAR TRAVEL PERIODS

26%	41%	19%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

WHERE TO?



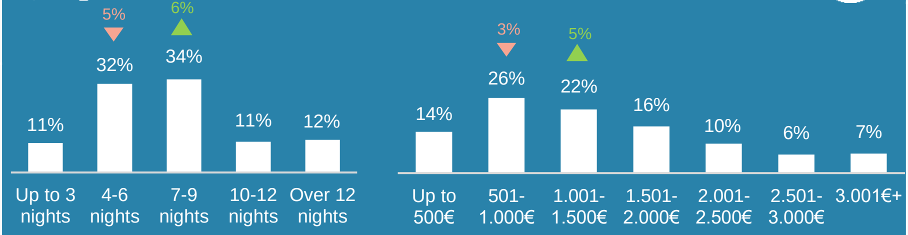
TRAVELLING WITH?

38% with partner

38% with family 8% ▲

9% solo 3% ▼

INTENDED LENGTH OF STAY AND BUDGET



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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach 25% 8% ▲

Culture & Heritage 19%

Coast & Sea 16%

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Italy	11% ▲ 3%	10%
Greece	9% ▲ 4%	6%
Spain	9%	10%
Portugal	7%	5%
Croatia	5%	5%

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

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

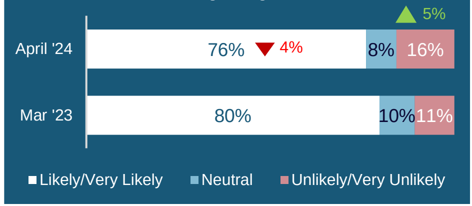
No. of respondents: 750 (total sample of respondents per country)

SNAPSHOT: GERMAN TRAVEL PLANS

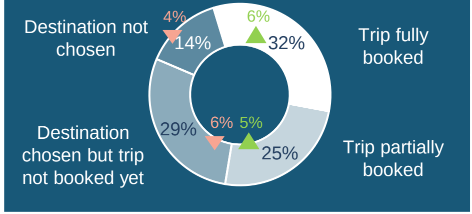
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

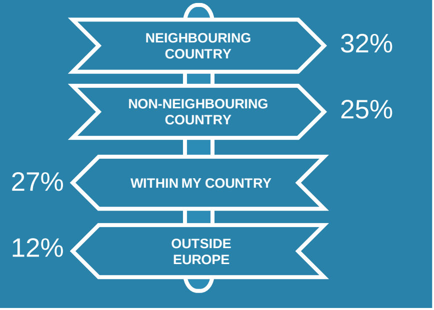


POPULAR TRAVEL PERIODS

37%	37%	16%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

WHERE TO?



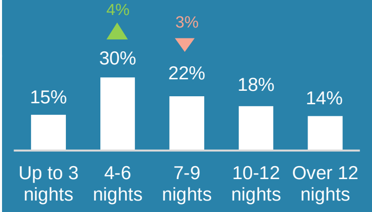
TRAVELLING WITH?

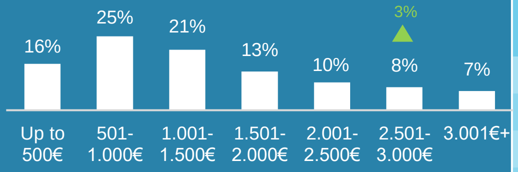
33% with partner

32% with family ▼ 6%

15% solo ▲ 5%

INTENDED LENGTH OF STAY AND BUDGET





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% ▼ 3%

Nature & Outdoors
19% ▲ 3%

Coast & Sea
15%

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Austria	9%	10%
Italy	8%	11%
Spain	7%	8%
France	6%	8%
Greece	5%	5%

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

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

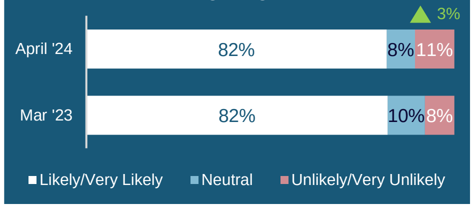
No. of respondents: 750 (total sample of respondents per country)

SNAPSHOT: ITALIAN TRAVEL PLANS

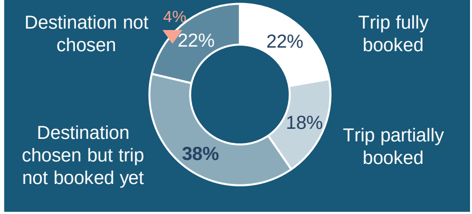
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

26%	47%	18%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

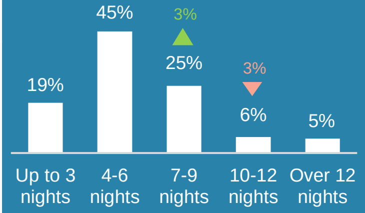
WHERE TO?

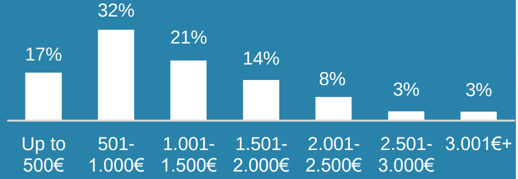
- NEIGHBOURING COUNTRY 22%
- NON-NEIGHBOURING COUNTRY 30%
- WITHIN MY COUNTRY 37%
- OUTSIDE EUROPE 7%

TRAVELLING WITH?

- **40%** with partner
- 34% with family ▲ 3%
- 8% solo

INTENDED LENGTH OF STAY AND BUDGET





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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Culture & Heritage **33%** ▲ 4%
- Sun & Beach **17%** ▲ 3%
- Coast & Sea **13%**

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Spain	13%	9%
France	9% ▼ 3%	12%
Greece	7%	7%
UK	5%	6%
Germany	5%	6%

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

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

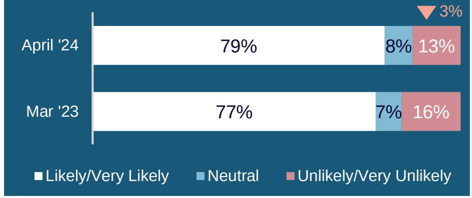
No. of respondents: 750 (total sample of respondents per country)

SNAPSHOT: POLISH TRAVEL PLANS

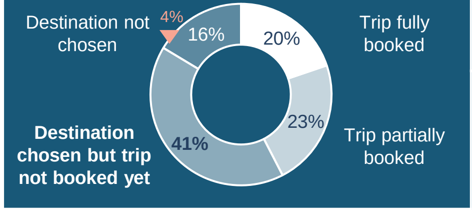
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

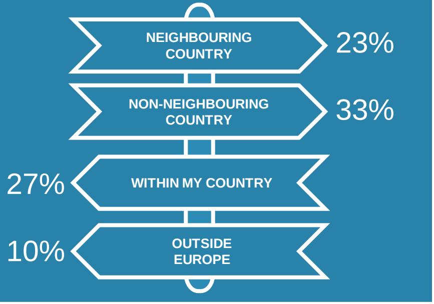


POPULAR TRAVEL PERIODS

28%	**45%**	15%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

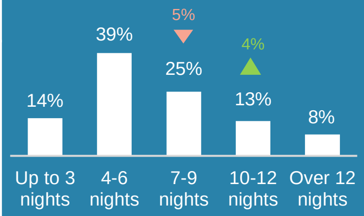
WHERE TO?

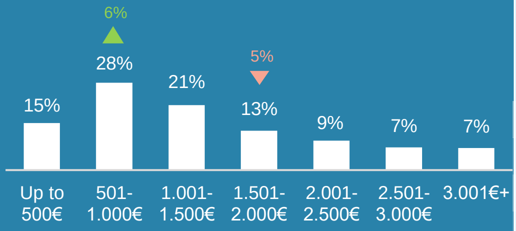


TRAVELLING WITH?

28% with partner	**41%** with family	9% solo

INTENDED LENGTH OF STAY AND BUDGET





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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

City Break
16% ▼ 6%

Coast & Sea
15%

Culture & Heritage
15%

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Italy	7% ▼ 3%	5%
Greece	7%	4%
Croatia	6%	7%
Germany	6%	7%
Czech Republic	5%	5%

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

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

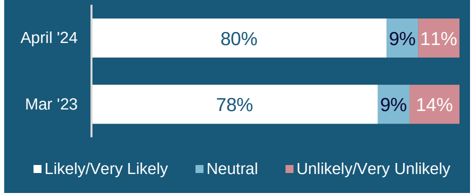
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: SPANISH TRAVEL PLANS

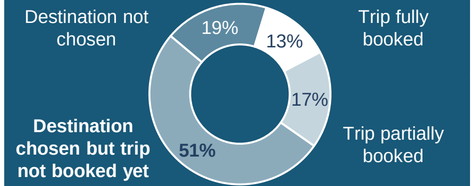
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

17%	48%	22%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

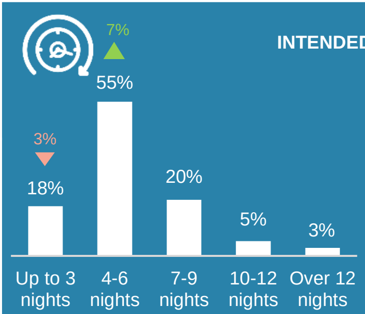
WHERE TO?

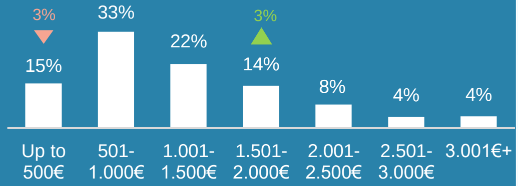
NEIGHBOURING COUNTRY	34% ▼5%
NON-NEIGHBOURING COUNTRY	18%
WITHIN MY COUNTRY	▲8% 40%
OUTSIDE EUROPE	6%

TRAVELLING WITH?

45% with partner ▲5%	37% with family	7% solo

INTENDED LENGTH OF STAY AND BUDGET





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

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

City Break
38% ▲4%

Culture & Heritage
20% ▲4%

Sun & Beach
11%

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Italy	17% ▲3%	15%
France	13% ▼3%	20%
Portugal	10%	13%
Germany	9%	7%
UK	5%	7%

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

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

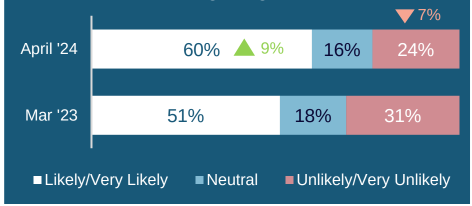
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: SWISS TRAVEL PLANS

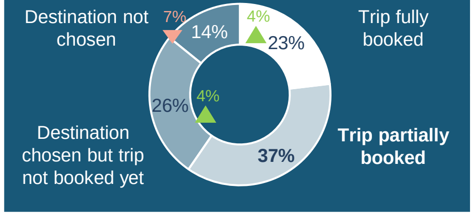
Travel horizon: May 2024-October 2024

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

32%	35%	22%
May-June '24	July '24-August '24	September '24-October '24

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING COUNTRY 36% ▲ 8%

NON-NEIGHBOURING COUNTRY 24%

WITHIN MY COUNTRY 17%

OUTSIDE EUROPE 15% ▼ 5%

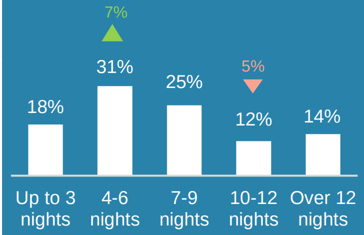
TRAVELLING WITH?

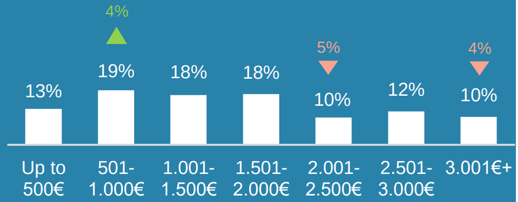
27% with partner ▲ 8%

28% with family ▲ 9%

14% solo

INTENDED LENGTH OF STAY AND BUDGET





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% ▲ 7%

Nature & Outdoors 14%

City Break 13%

TOP 5 EUROPEAN DESTINATIONS**

	Plan to visit	Have visited before
Italy	8%	8%
Germany	8% ▲ 4%	7%
France	7%	7%
Greece	5%	3%
Austria	5%	5%

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

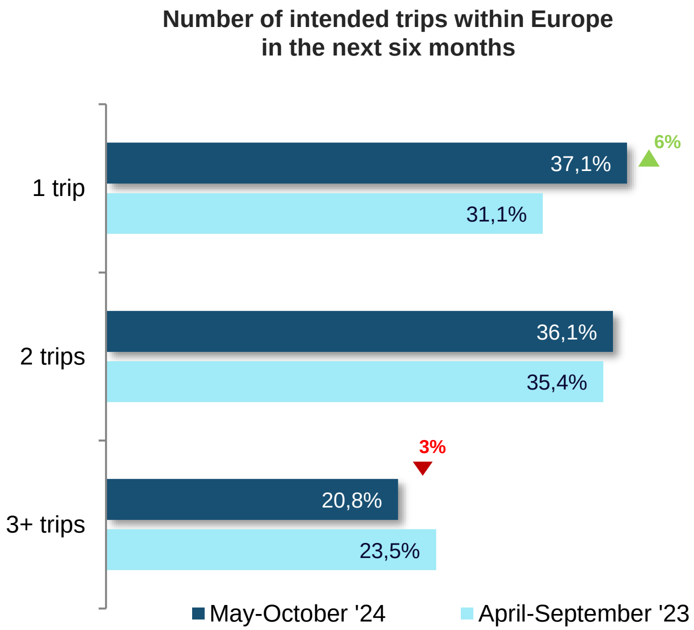
** Based on total sample, without reference to domestic trips

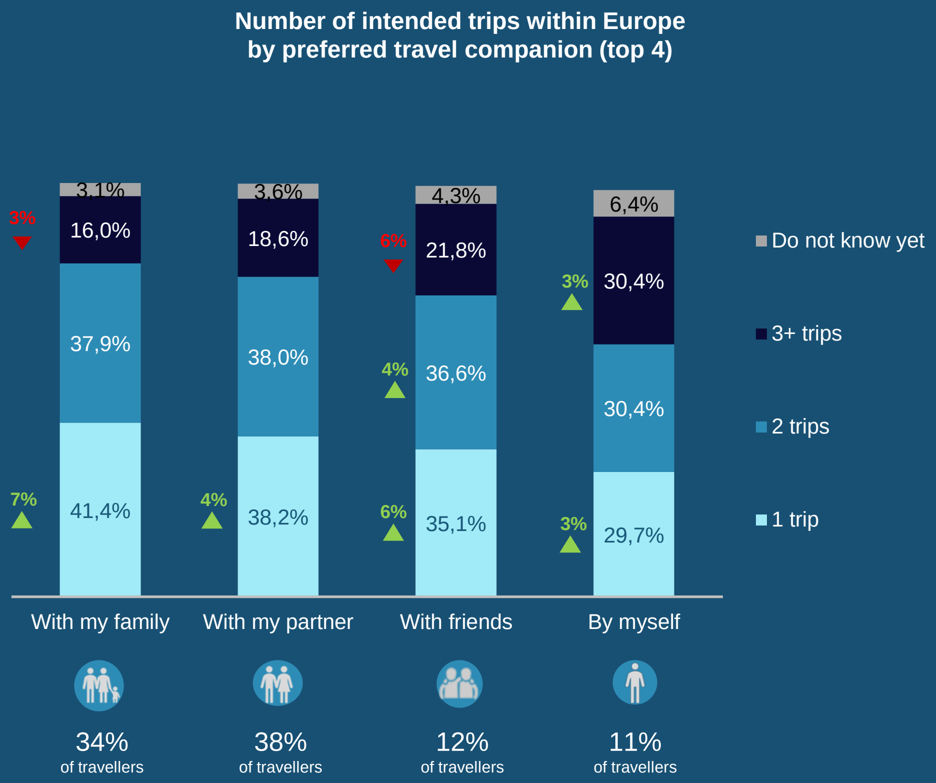
No. of respondents: 359 (total sample of respondents per country)

PLANNING THE DETAILS

02

57% of Europeans plan to travel multiple times between May and October. Solo travellers and those travelling with their friends are the most likely to take numerous trips





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

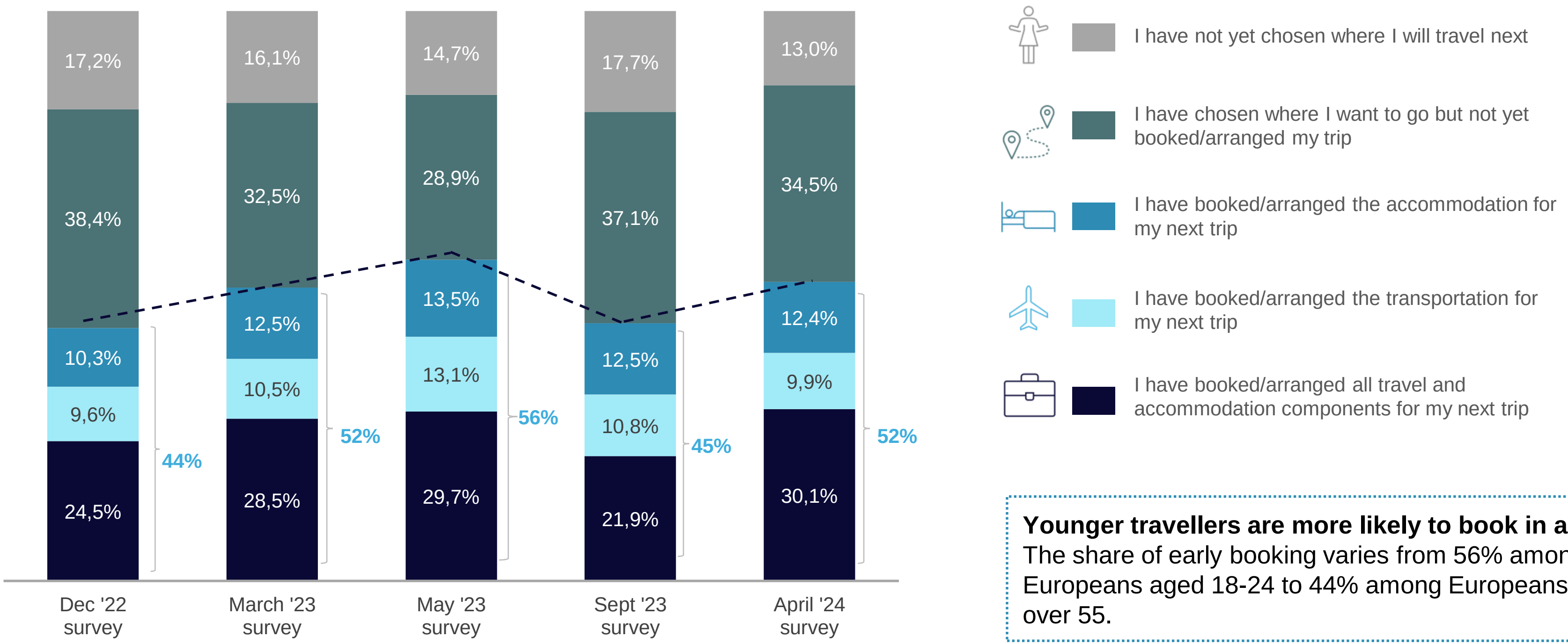
* Statistically significant difference vs a year ago (March 2023)

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

No. of respondents: 4,419

As the peak travel season approaches, more Europeans make advanced bookings for their trip(s)

Planning status for the next trip

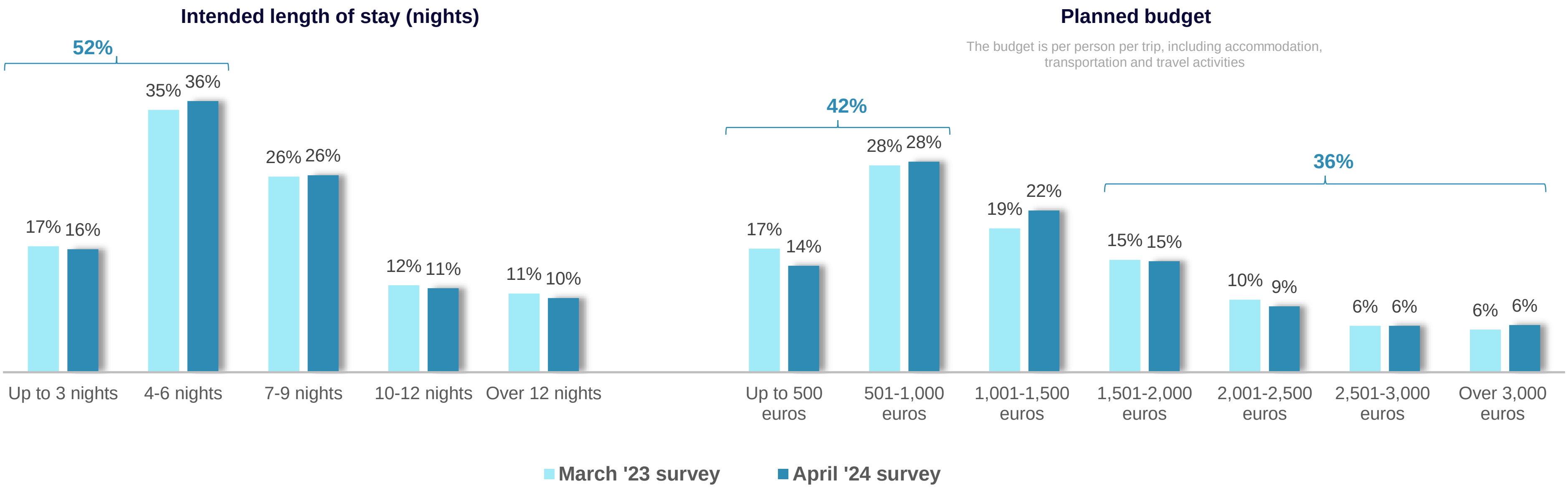


Younger travellers are more likely to book in advance: The share of early booking varies from 56% among Europeans aged 18-24 to 44% among Europeans aged over 55.

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

No. of respondents: 4.419

52% of Europeans are planning trips lasting up to 6 nights, with a budget of 500-1,000 euros, which remains consistent with the figures from a year ago



Although Sun & Beach travellers intend to stay longer, the planned budget is similar to other types of trips: 33% of travellers planning a Sun & Beach trip are likely to stay for 7-9 nights at the destination (vs. 26% of all travellers). Yet, the share of beach holidaymakers with a budget of 500-1,000 euros is 28% - similar to all other 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: 4,419

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	38%	13%	7%
501 - 1,000 euros	32%	37%	23%
1,001 - 1,500 euros	9%	24%	27%
1,501 - 2,000 euros	7%	13%	18%
2,001 - 2,500 euros	5%	7%	10%

Looking for high-value travellers?
Europeans spending over 1,500 euros on their next trip are most likely to opt for yachting and sailing (60%), embark on a cruise (51%), or take a culinary trip (50%).

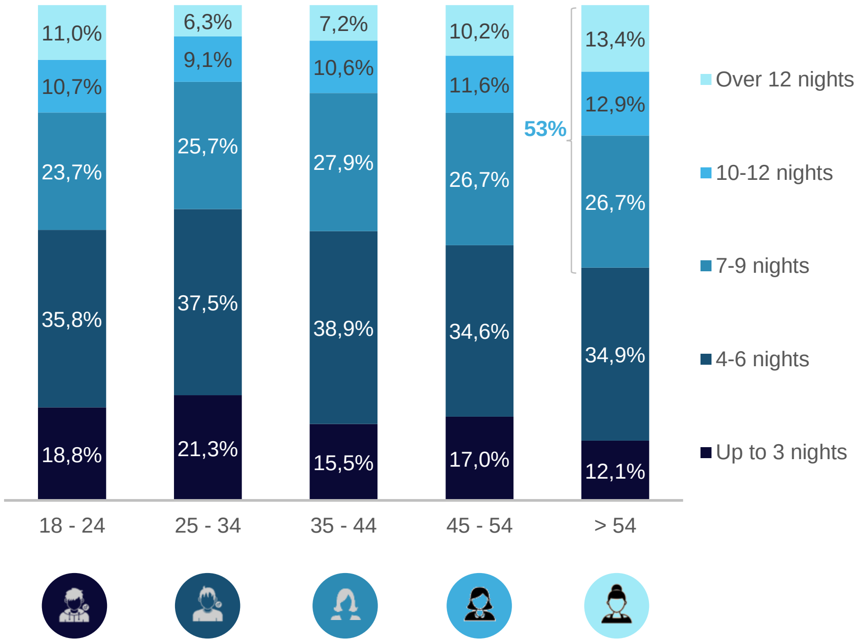
No. of respondents: 4,419

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)?

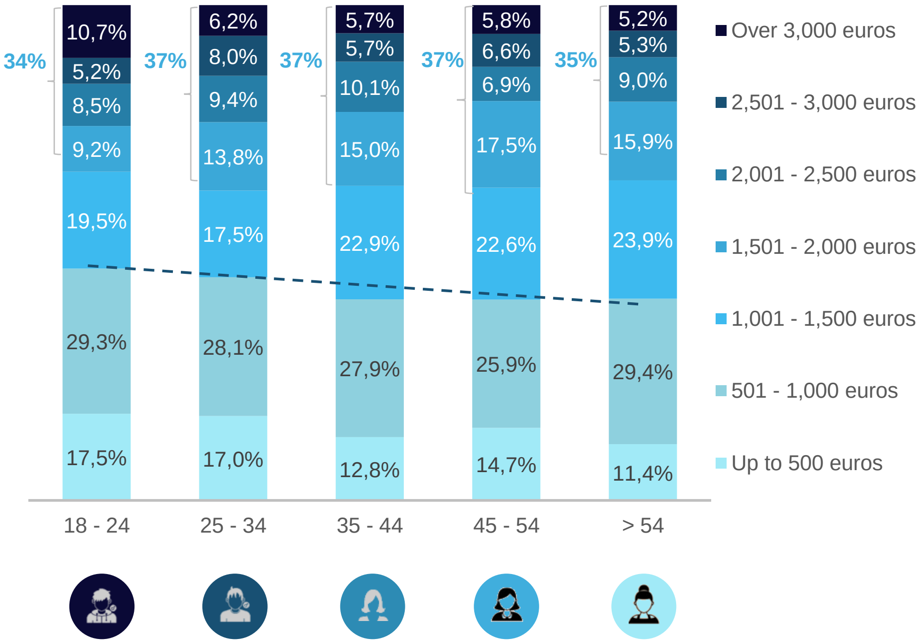
Mature Europeans, over the age of 55, are the most likely to take longer trips and spend over 1,000 euros

Intended length of stay (nights)



Envisaged budget

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

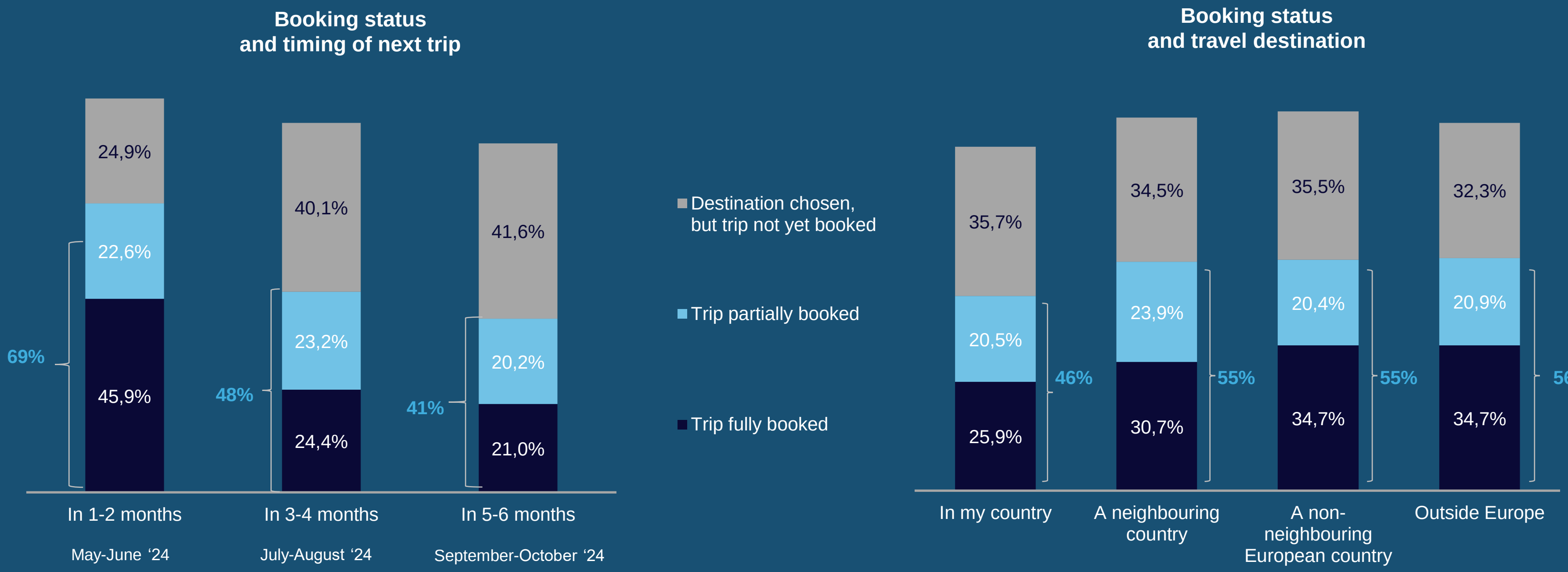


Q18. What would be the length of your next overnight trip?

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

No. of respondents: 4,419

48% of Europeans have already booked their trip for the coming summer. Travellers heading for domestic trips are the least likely to pre-book.



April ‘24 survey

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

No. of respondents: 4,419

Europeans' intentions to fly hit 2020 highs - more than 1 in 2 people consider taking a plane to reach their next destination. Travelling by car remains the second most popular option for travelling within the region.

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

UK
74.6%
5% ▲

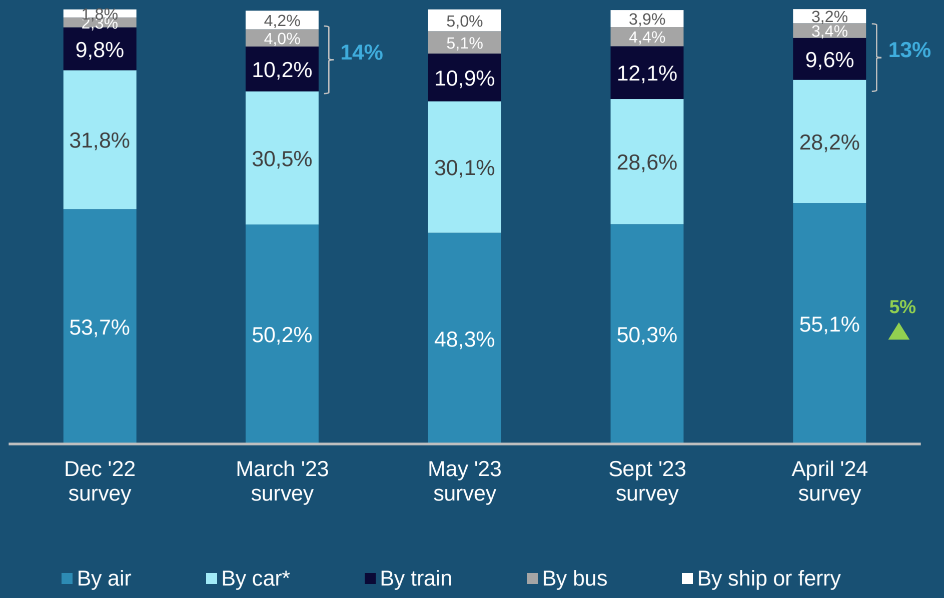
France
56.0%
5% ▲

Spain
74.1%
4% ▲

Poland
54.6%

Italy
68.6%
5% ▲

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



Statistically significant difference vs a year ago (March 2023)

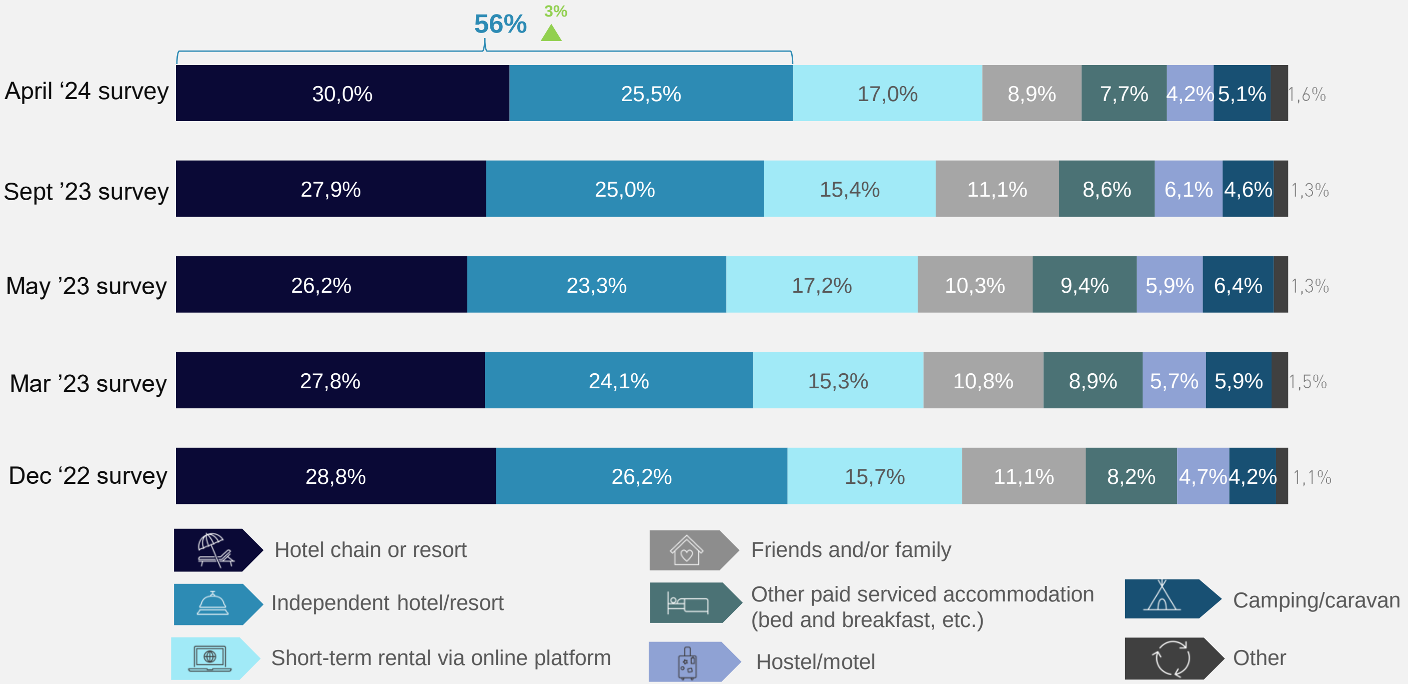
*Up to September '23, 'By car' was recorded as two separate answers (own vs. rented)

No. of respondents: 4,419

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

Hotels are the preferred accommodation for 56% of Europeans during the upcoming travel season, followed by short-term rentals (17%)

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



Europeans aged 18-34 are more likely to stay in short-term rentals (21% vs. 15% among older age groups); travellers aged over 35 are more likely to opt for a hotel (56% vs. 46% among younger age groups).

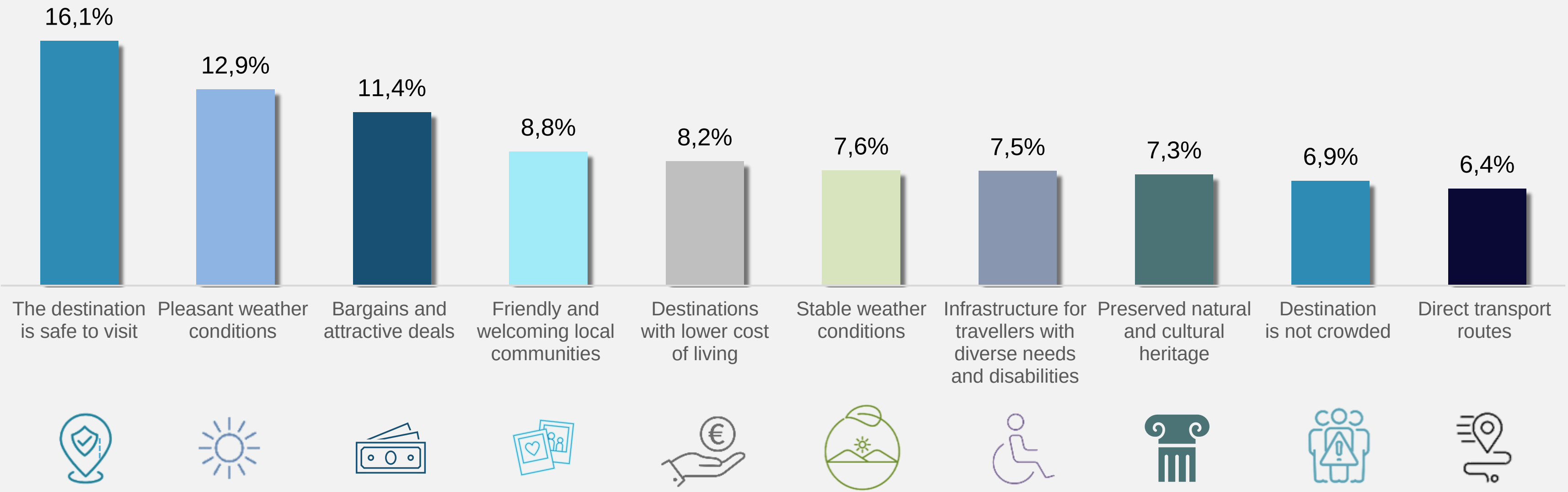
Q15. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

*No statistically significant difference vs a year ago (March 2023)

No. of respondents: 4,419

Amidst geopolitical tensions, destination' safety is a prime consideration among 16% of European travellers. Another 13% prioritise the weather conditions.

Top 10 criteria for choosing the next travel destination*



Safety is more important for mature travellers: 31% of travellers who prioritise the destination's safety are over the age of 55, vs. only 12% among travellers aged 18-24.

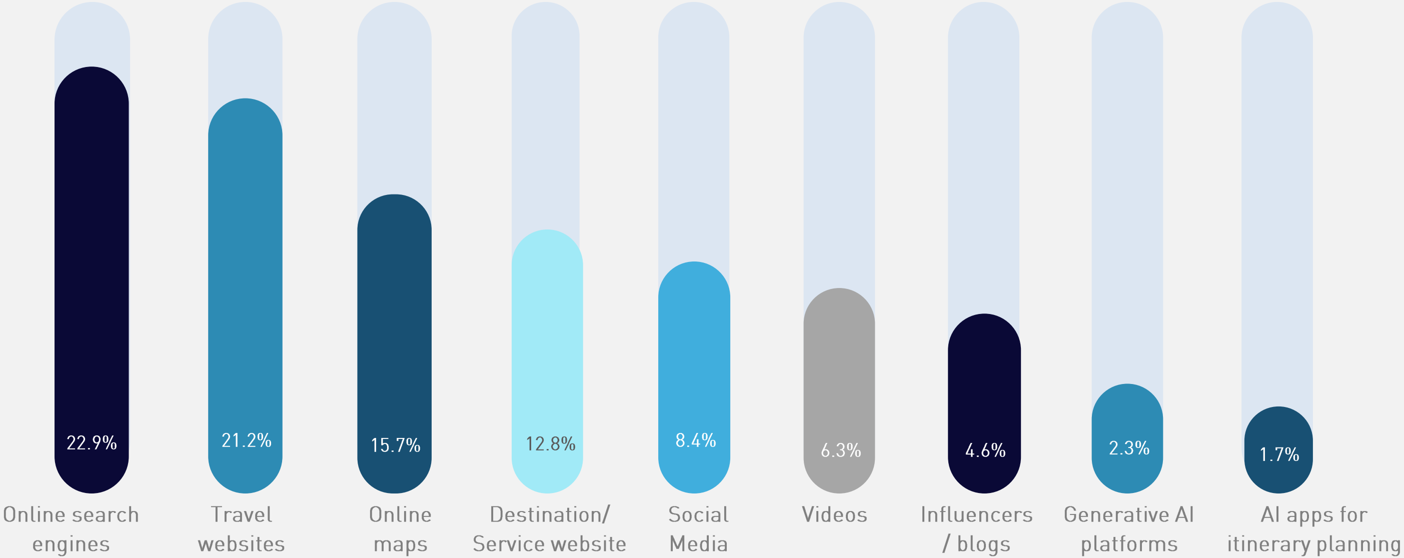
Q6. What criteria will play the most important role in choosing your next holiday destination?
* This question was changed from W18 onwards

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

No. of respondents: 5,859

European travellers mainly rely on search engines and travel websites for their trip planning. AI tools have a limited reach yet, and only 4% use them.

Preferred digital tools for planning next trip



Preferences by generation

Travellers aged 18-34 favour audiovisual, personalised content, on SoMe, YouTube videos or by travel bloggers (29% vs 12% of travellers aged 55+). Mature travellers use search engines and websites more (78%, vs. 64% of 18-24).

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

No. of respondents: 4,419

EUROPEANS’ TRIP PLANNING PATTERNS, ACCORDING TO INCOME

Travel horizon: May 2024-October 2024

	€ Low	€ € Mid	€€€ High
TRAVEL INTENTIONS	**72%** intend to travel	**76%** intend to travel	**82%** intend to travel
NUMBER OF TRIPS	**37%** 1 trip **47%** 2+ trips	**34%** 1 trip **55%** 2+ trips	**27%** 1 trip **65%** 2+ trips
PREFERRED TYPE OF HOLYDAY	**19%** Sun & Beach **15%** Culture & Heritage	**21%** Sun & Beach **15%** City Break	**18%** Sun & Beach **14%** Culture & Heritage
LENGTH OF STAY AT THE DESTINATION	**18%** up to 3 nights **82%** 4+ nights	**16%** up to 3 nights **88%** 4+ nights	**19%** up to 3 nights **82%** 4+ nights
AVAILABLE BUDGET (per person)	**50%** up to 1.000 € **50%** 1.000+ €	**39%** up to 1.000 € **60%** 1.000+ €	**28%** up to 1.000 € **72%** 1.000+ €

Analysis of is based on the sample’s sociodemographic data; actual amounts cannot be provided, since household incomes are different in each market
Low: 2,322, Mid: 2,102, High: 1,089

No. of respondents: 5,859

TRAVEL CONCERNS

03

WHAT DO EUROPEAN TRAVELLERS WORRY ABOUT?

Inflation and personal finances are once again the leading concerns for 39% of Europeans, while growing geopolitical conflicts worry another 22% of them

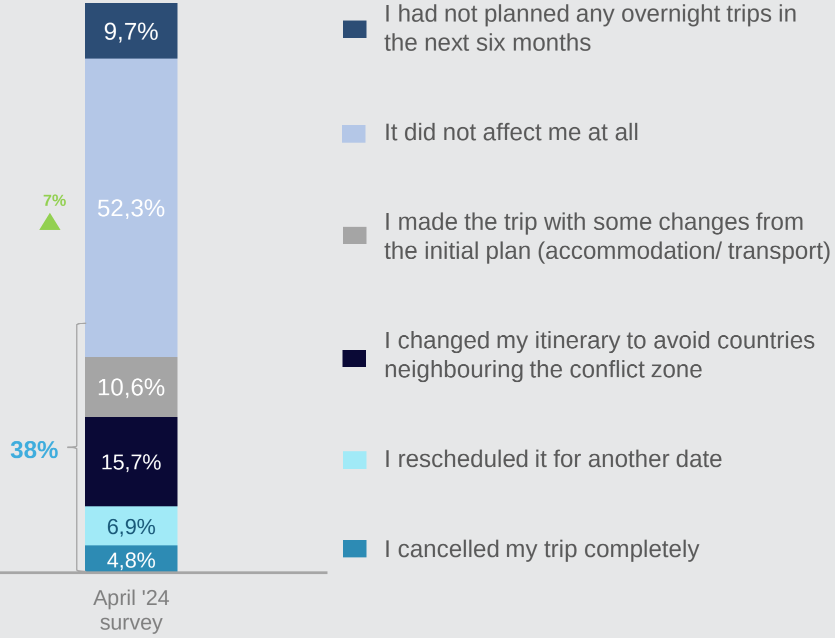
Top 4 markets concerned with rising travel costs		Top 4 markets concerned with personal finances	
Spain 25%	3% ▼	Spain 17%	3% ▼
France 23%		Germany 17%	
Italy 23%		UK 17%	
UK 22%	3% ▼	Belgium 17%	

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

No. of respondents: 4,419

More than half of Europeans are continuing with their travel plans, despite the ongoing war in Ukraine.

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** 51.7%	6% ▲	17%
	**Poland** 50.2%	7% ▲	18%
	**Italy** 42.4%		23%
	**Netherlands** 40.0%		16%
	**Belgium** 39.4%		11%

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

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

No. of respondents: 5,859

EUROPEANS ARE ADAPTING TRAVEL PREFERENCES PRIOR TO REACHING THEIR DESTINATIONS

Off-season trips, affordable destinations, and early bookings are the most common coping strategies

17%
OFF-SEASON JOURNEYS

13%
MORE AFFORDABLE DESTINATIONS

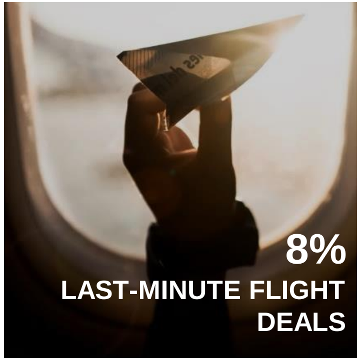
12%
EARLY BOOKING OF ACTIVITIES

12%
EARLY BOOKING OF FLIGHTS

11%
LOW-COST FLIGHTS

8%
SHORTER TRIPS

10%
PACK LIGHT



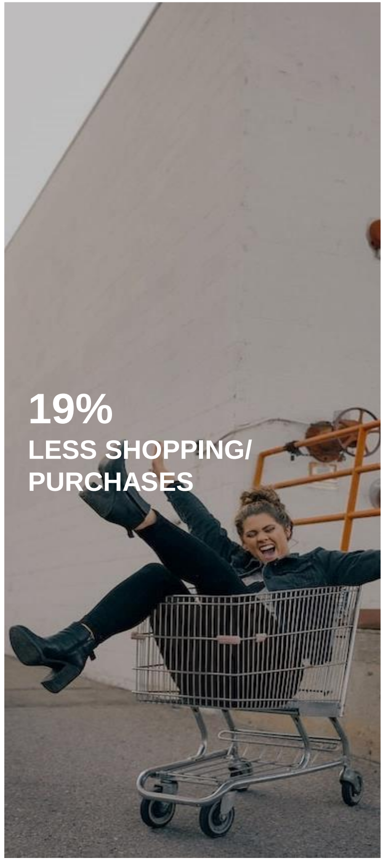
8%
LAST-MINUTE FLIGHT DEALS

Q21. 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?

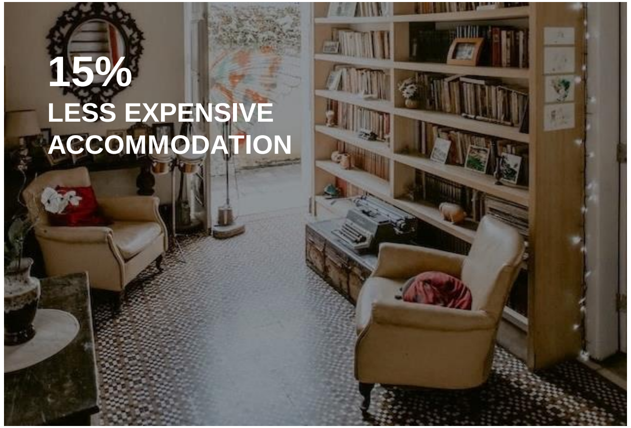
No. of respondents: 4,419

THE IN-DESTINATION BEHAVIOUR IS CHANGING TOO, TO FIT WITH TIGHTER BUDGETS

Less shopping, affordable accommodation, and meals top Europeans’ cost-cutting options



19%
LESS SHOPPING/ PURCHASES

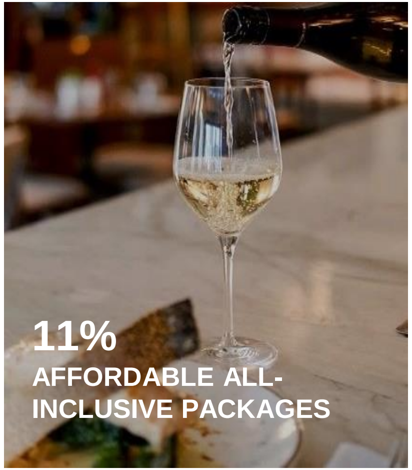


15%
LESS EXPENSIVE ACCOMMODATION

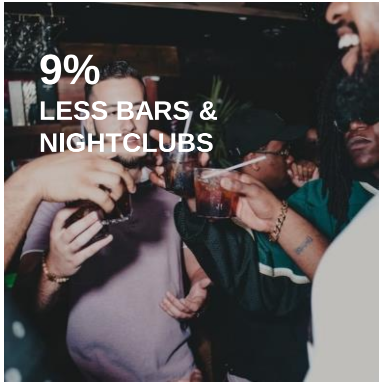
15%
LESS EXPENSIVE RESTAURANTS/SELF-CATERING

11%
USE OF PUBLIC TRANSPORT OR BIKE RENTALS

10%
LESS ACTIVITIES WITH ADMISSION FEES



11%
AFFORDABLE ALL-INCLUSIVE PACKAGES



9%
LESS BARS & NIGHTCLUBS

Q22. 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?

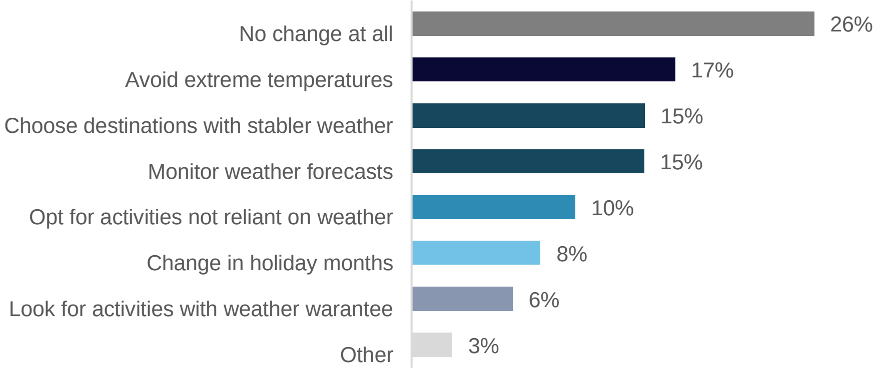
No. of respondents: 4,419

Europeans adjusting travel habits according to changing climate

When questioned about adjusting their travel behaviours due to the changing climate, a quarter of surveyed Europeans indicated they maintain their current habits, while another large proportion have begun adopting some new practices. 17% of respondents shared that they avoid destinations where temperatures can soar to extremes. 47% seek some form of weather reassurance by opting for stable weather destinations, monitoring weather forecasts, or choosing weather-independent activities. Additionally, a smaller percentage shifts their travel timing, while very few prioritise travel services that offer weather guarantees.

Important: Future research waves will provide a better understanding of how these trends evolve.

Effect of the changing climate on travel habits



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

No. of respondents: 5,859

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 (2021-2023/24)
- Distribution/data collection period:
    - **Wave 15**: 1-7 March 2023; sample = 6,000 / **Wave 16**: 8 May-4 June 2023; sample = 6,002 / **Wave 17**: 11 -26 September 2023; sample = 5,993 / **Wave 18**: 2-17 April 2024; sample = 5,859
    - **Countries**: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
    - **Languages**: English, French, German, Italian, Spanish, Polish and Dutch
- **Research themes examined**: travel personas (one question), travel concerns and impact of external shocks on travel (eight questions), and travel intentions, preferences and trip planning (fourteen questions)
- 45% of the Wave 18 survey respondents are male and 55% 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	130	96	92	56	89	68	136	**869**
	25 - 34	136	112	73	142	128	152	106	121	85	173	**1,228**
	35 - 44	126	134	103	77	140	150	120	73	76	64	**1,063**
	45 - 54	138	168	105	82	146	168	92	99	70	61	**1,129**
	≥55	262	266	175	69	240	188	126	118	60	66	**1,570**
Total		**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**359**	**500**	**5,859**

Study on Monitoring Sentiment for Intra-European Travel

While we encourage distribution via publicly accessible websites, this should be done via a link to ETC's corporate website, www.etc-corporate.org

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

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