



# 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 **17<sup>th</sup> wave of a market research project**<sup>1</sup> 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.

# WAVE 17 RESEARCH HIGHLIGHTS

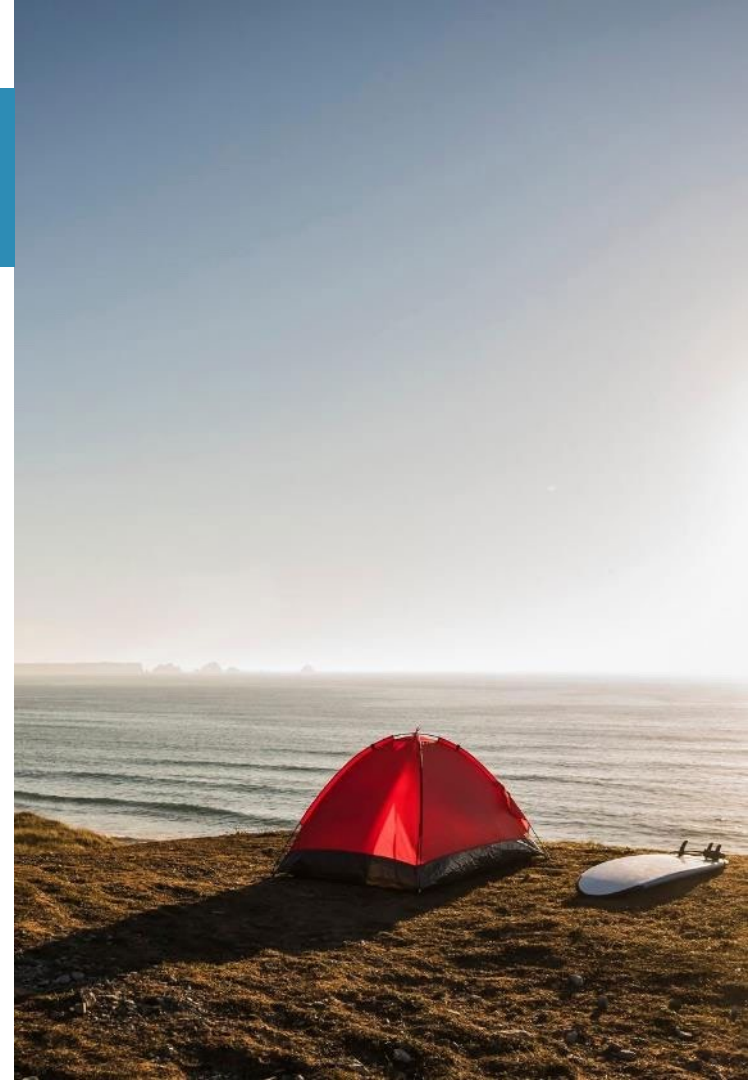
## Use of greener transport options rises to an all-time high

- **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), ~~servicing 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.**



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# Reading the data

## Wave 17

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

	<a href="#">Wave 13</a>	<a href="#">Wave 14</a>	<a href="#">Wave 15</a>	<a href="#">Wave 16</a>	<a href="#">Wave 17</a>
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



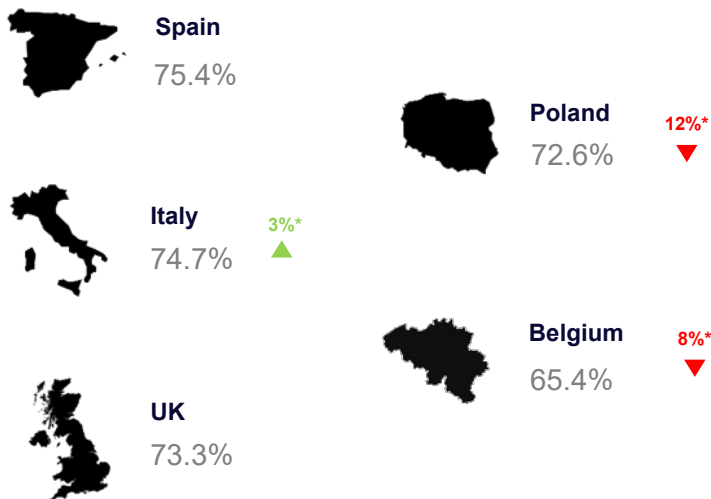
A blue-tinted landscape photograph of a mountain valley. In the foreground, there is a grassy field. In the middle ground, several wooden huts or chalets are visible, some with balconies. The background features steep, rocky mountains under a cloudy sky. The text 'TRAVEL PLANS' is overlaid on the left side, and a large white number '01' is overlaid on the bottom right. A small cyan vertical bar is on the far left edge.

# TRAVEL PLANS

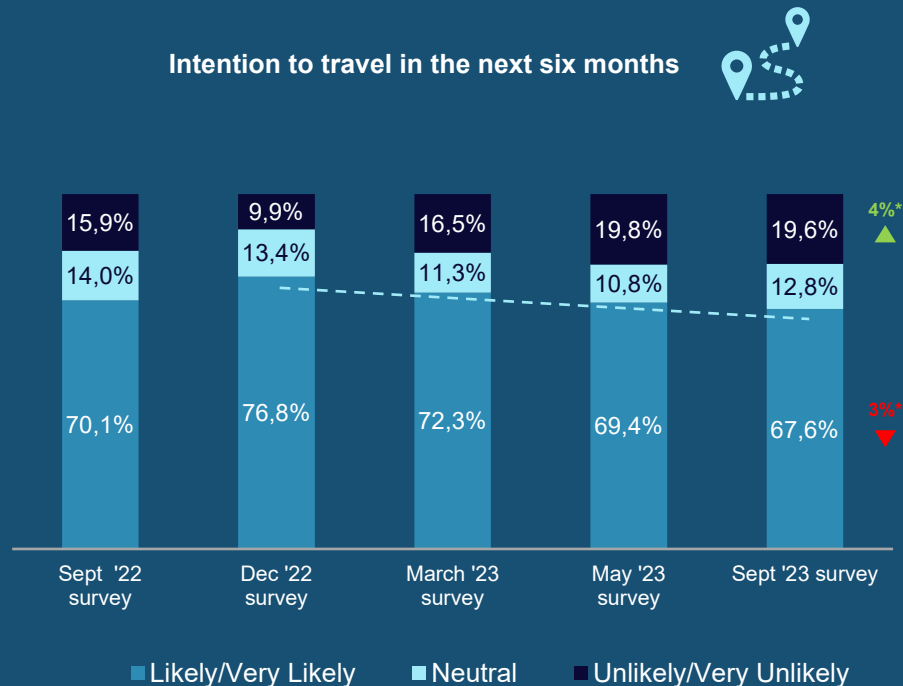
01

# 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



## Intention to travel in the next six months



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

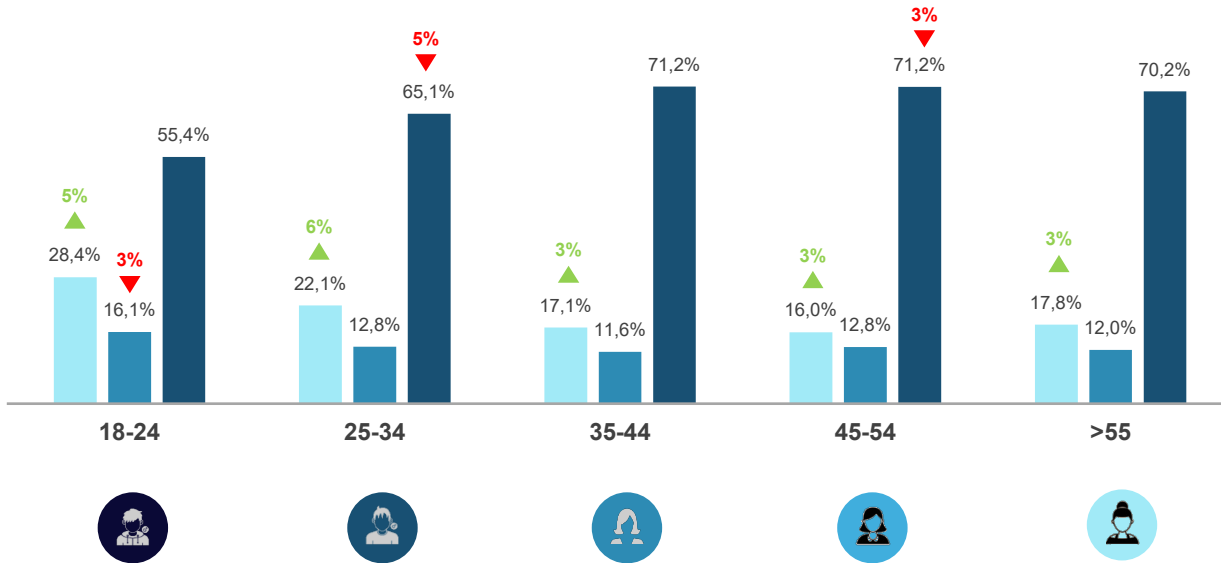
\* Statistically significant difference vs a year ago (Sept' 2022)

No. of respondents: 5,993

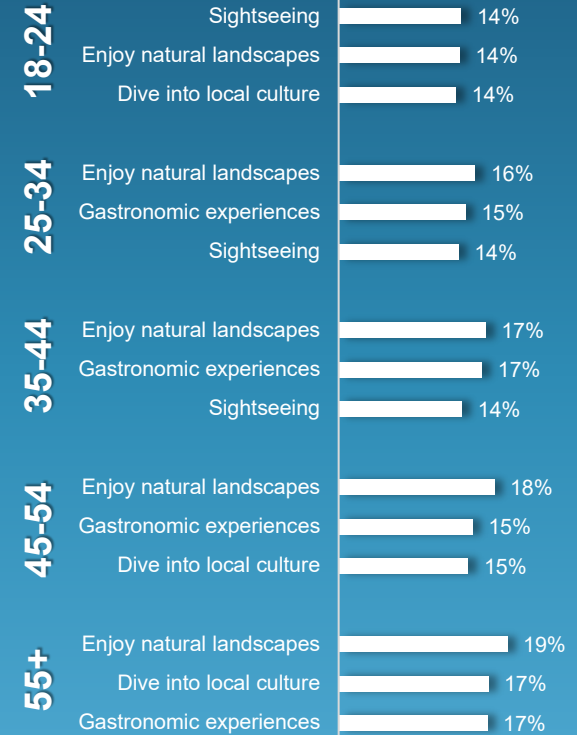
# Europeans over the age of 35 are the most eager to travel; desire to travel drops by 5% among those aged 25-34

## Intention to travel in the next six months by age group

Very unlikely/unlikely Neutral Likely/very likely



## TOP TRAVEL EXPERIENCES BY AGE GROUP:

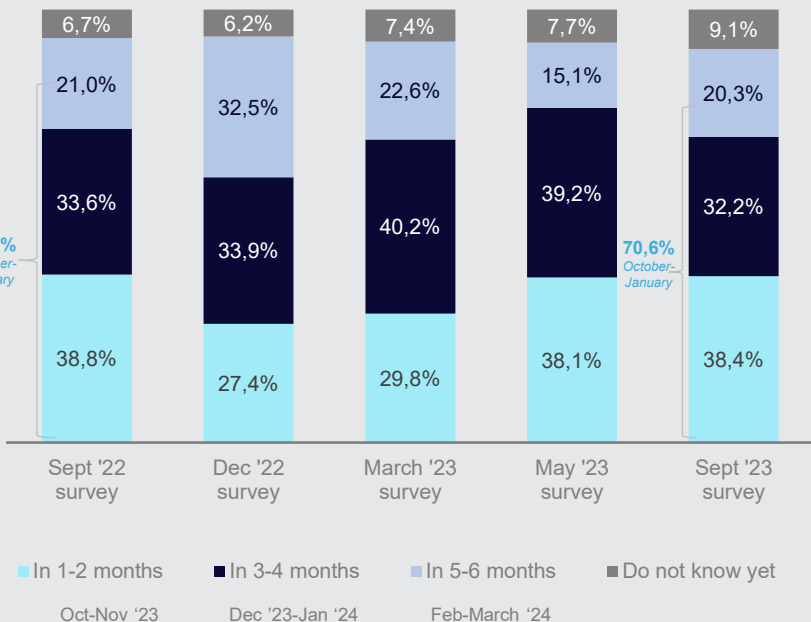


11 Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?  
Q6. What criteria will play the most important role in choosing your next holiday destination?

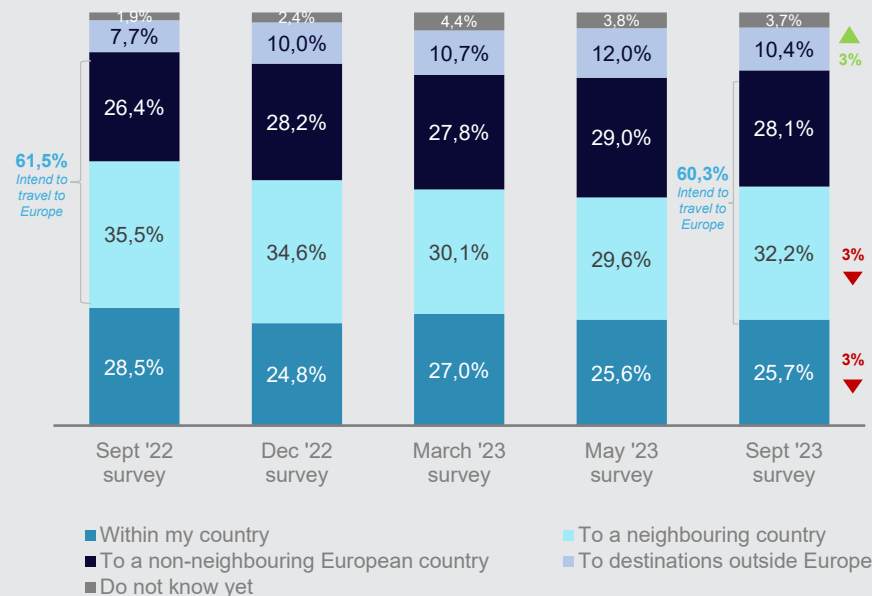
\* Statistically significant difference vs a year ago (Sept' 2022)

# 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?



### Where will Europeans travel within the next 6 months?



Q10. When are you most likely to go on your next trip either in your country or within Europe?

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

Sept '23 survey

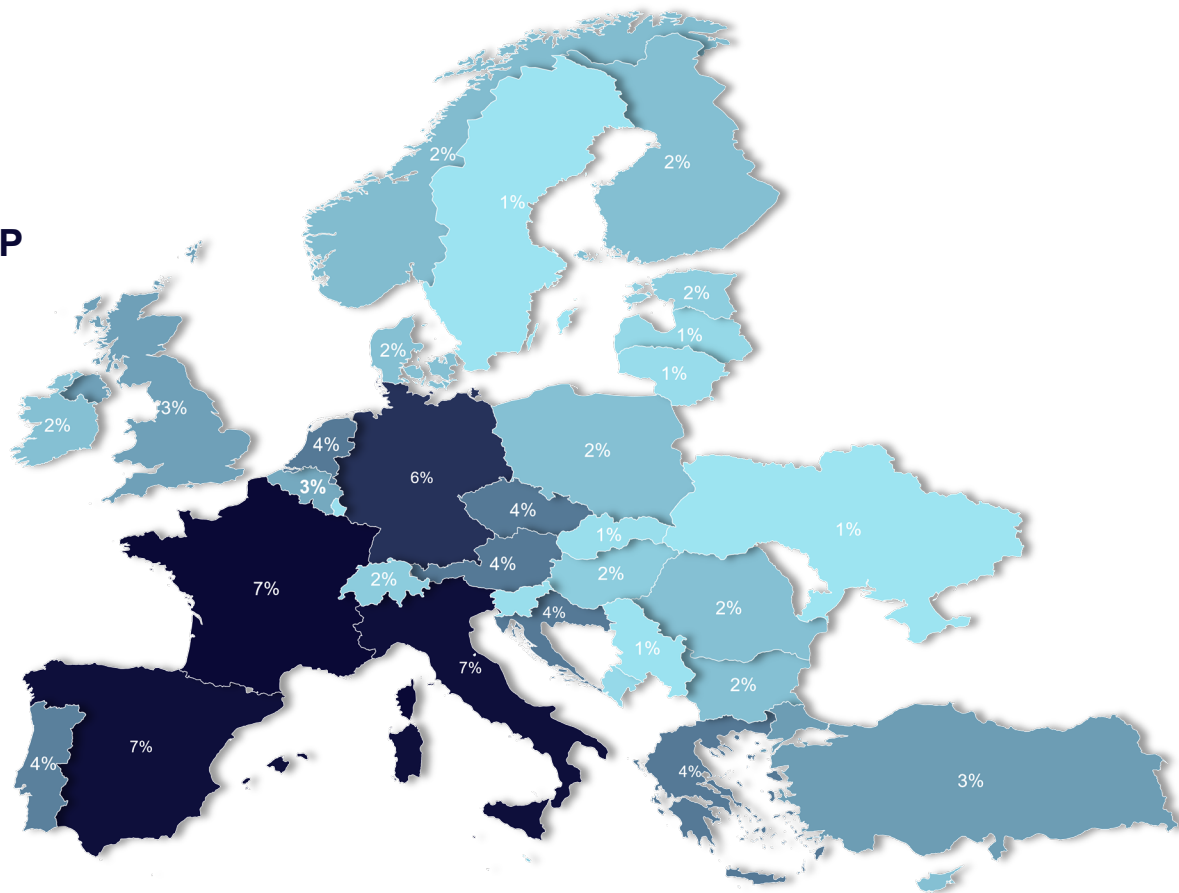
## PREFERRED COUNTRIES FOR EUROPEANS' NEXT INTERNATIONAL TRIP

### TOP 10 COUNTRIES

France	▼ 3%	7,4%
Italy	21%	7,0%
Spain	▼ 8%	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%

\* Please use this map as a reference only

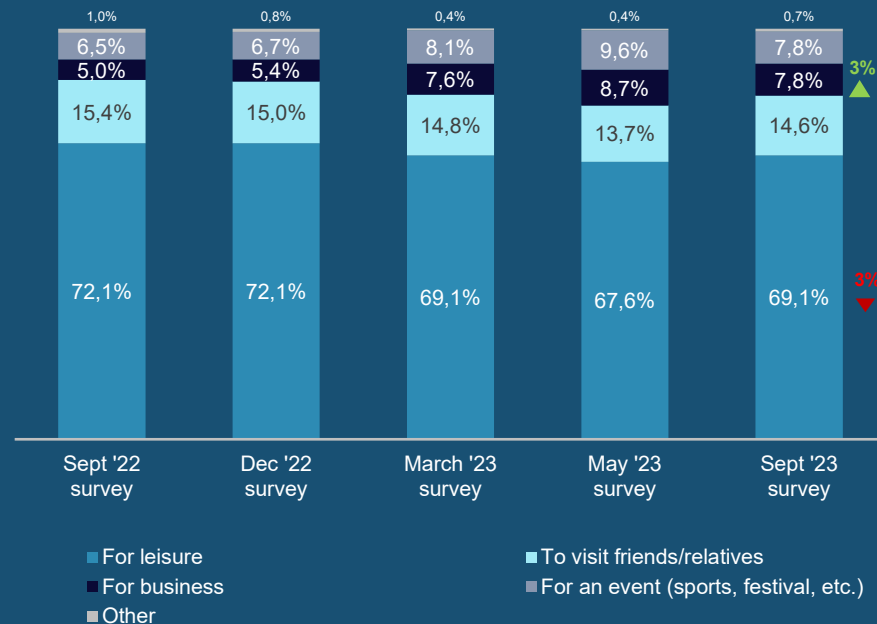
No. of respondents: 4,852



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



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



## 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



# 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	<b>27%</b> >55	<b>21%</b> 25-34	<b>36%</b> >55	<b>22%</b> 45-54	<b>29%</b> >55	<b>23%</b> 35-44	<b>24%</b> 25-34	<b>24%</b> 35-44
MOST COMMON LENGTH OF STAY & BUDGET	<b>45%</b> 4-6 nights <b>36%</b> Up to 3 nights	<b>36%</b> 500-1000 € <b>21%</b> Up to 500 €	<b>46%</b> 4-6 nights <b>21%</b> Up to 3 nights	<b>26%</b> 500-1000 € <b>22%</b> 1001-1500 €	<b>41%</b> 4-6 nights <b>28%</b> 7-9 nights	<b>28%</b> 500-1000 € <b>24%</b> 1001-1500 €	<b>31%</b> 4-6 nights <b>31%</b> 7-9 nights	<b>31%</b> 500-1000 € <b>20%</b> 1001-1500 €
TOP 4 EXPERIENCES TO TRY	<b>20%</b> Sightseeing <b>17%</b> Learn about history <b>17%</b> Dive into local culture <b>17%</b> Gastronomic experiences	<b>22%</b> Learn about history <b>18%</b> Dive into local culture <b>16%</b> Sightseeing <b>15%</b> Enjoy natural landscapes	<b>26%</b> Enjoy natural landscapes <b>15%</b> Gastronomic experiences <b>14%</b> Dive into local culture <b>12%</b> Active experiences	<b>19%</b> Enjoy natural landscapes <b>17%</b> Gastronomic experiences <b>15%</b> Dive into local culture <b>14%</b> Sightseeing				

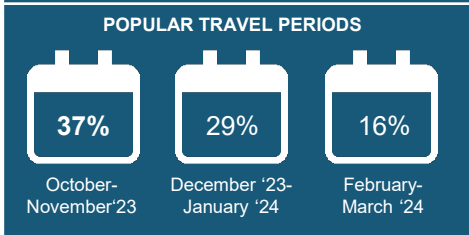
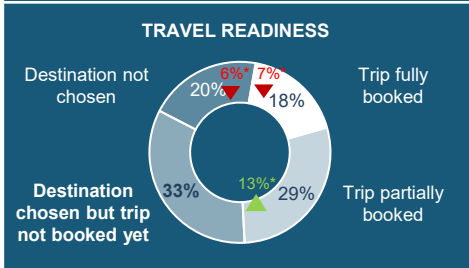
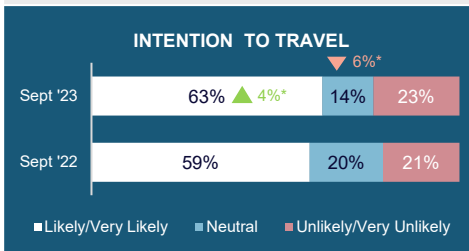


# SNAPSHOT: AUSTRIAN TRAVEL PLANS

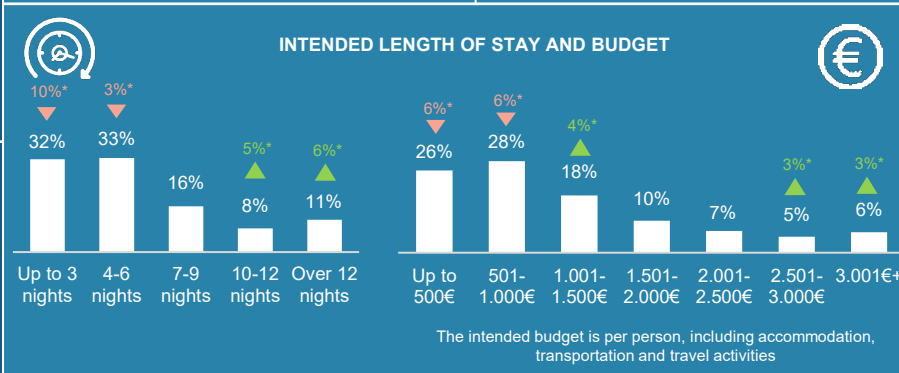
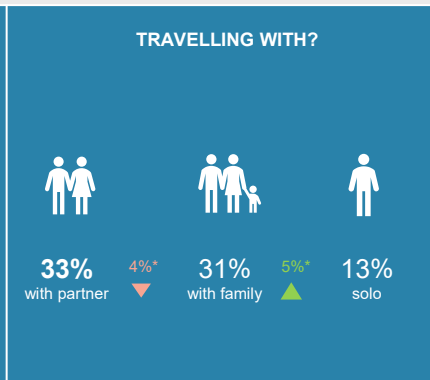
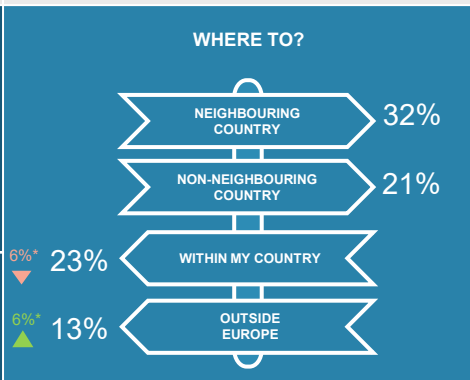
Travel horizon: October 2023-March 2024



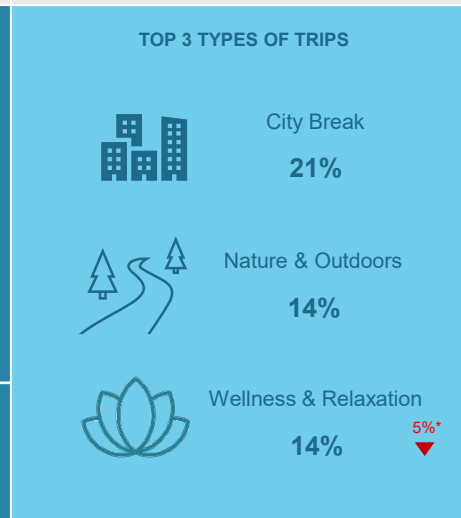
## TRAVEL SENTIMENT



## TRAVEL PLANNING



## PREFERRED TYPES OF TRIPS & DESTINATIONS



### TOP 5 EUROPEAN DESTINATIONS\*\*

Destination	Percentage
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)

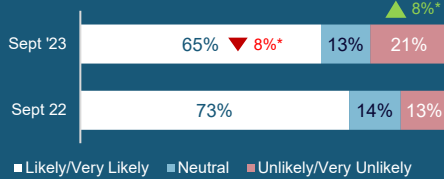
# SNAPSHOT: BELGIAN TRAVEL PLANS

Travel horizon: October 2023-March 2024

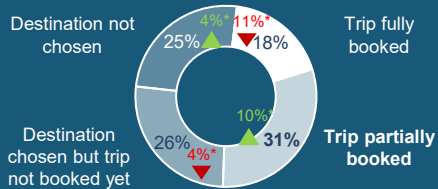


## TRAVEL SENTIMENT

### INTENTION TO TRAVEL



### TRAVEL READINESS

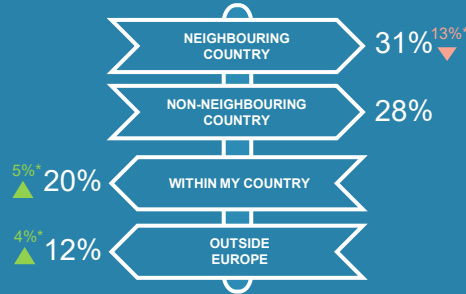


### POPULAR TRAVEL PERIODS

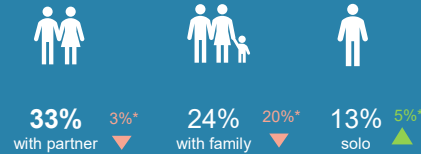


## TRAVEL PLANNING

### WHERE TO?

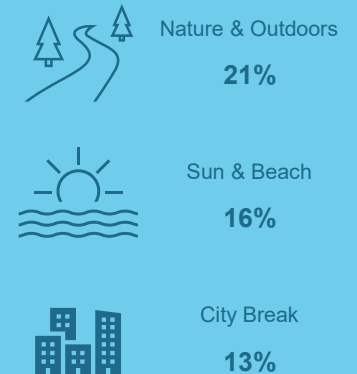


### TRAVELLING WITH?

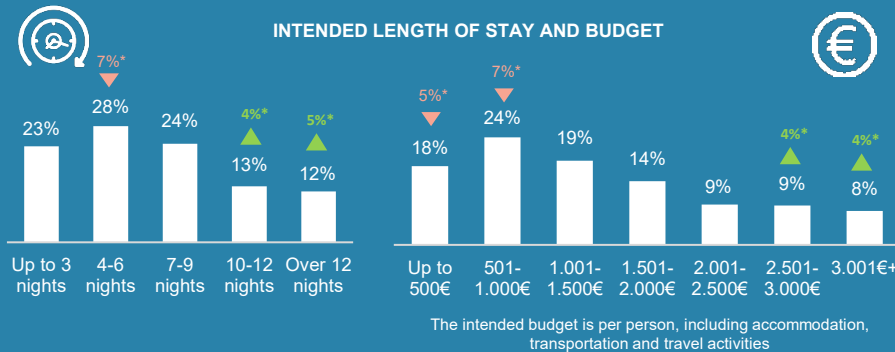


## PREFERRED TYPES OF TRIPS & DESTINATIONS

### TOP 3 TYPES OF TRIPS



### INTENDED LENGTH OF STAY AND BUDGET



### TOP 5 EUROPEAN DESTINATIONS\*\*

France	14% <span style="color:red">▼ 8%*</span>
Italy	7%
Spain	7% <span style="color:red">▼ 5%*</span>
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)

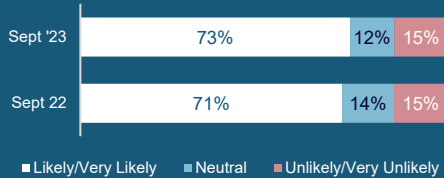
# SNAPSHOT: BRITISH TRAVEL PLANS

Travel horizon: October 2023-March 2024

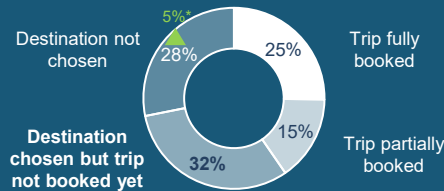


## TRAVEL SENTIMENT

### INTENTION TO TRAVEL



### TRAVEL READINESS

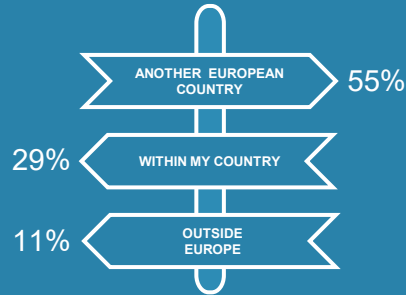


### POPULAR TRAVEL PERIODS

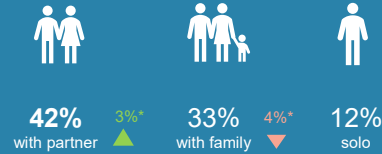


## TRAVEL PLANNING

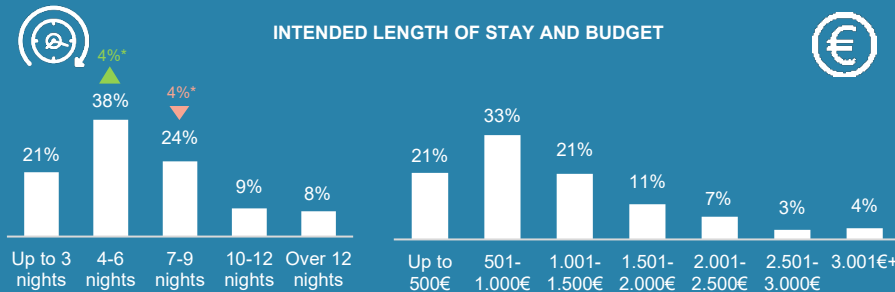
### WHERE TO?



### TRAVELLING WITH?



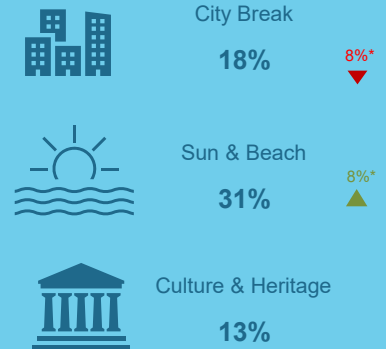
### INTENDED LENGTH OF STAY AND BUDGET



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

## PREFERRED TYPES OF TRIPS & DESTINATIONS

### TOP 3 TYPES OF TRIPS



### TOP 5 EUROPEAN DESTINATIONS\*\*

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

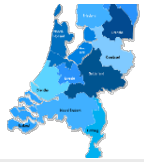
\* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

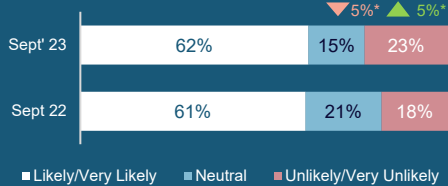
# SNAPSHOT: DUTCH TRAVEL PLANS

Travel horizon: October 2023-March 2024

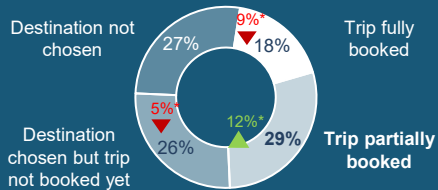


## TRAVEL SENTIMENT

### INTENTION TO TRAVEL



### TRAVEL READINESS

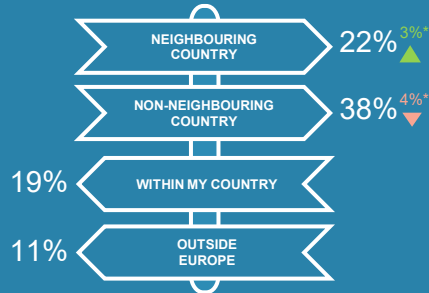


### POPULAR TRAVEL PERIODS

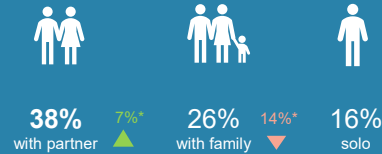


## TRAVEL PLANNING

### WHERE TO?

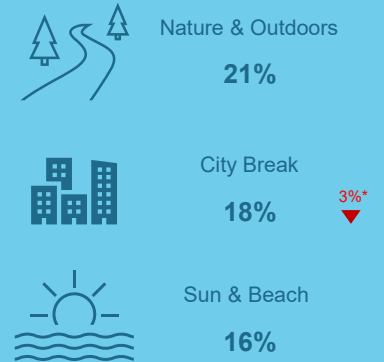


### TRAVELLING WITH?

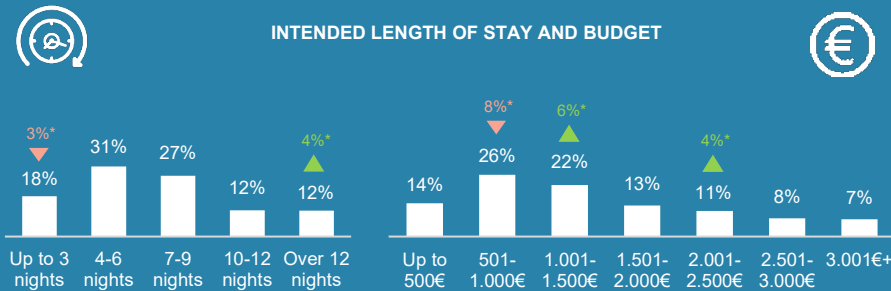


## PREFERRED TYPES OF TRIPS & DESTINATIONS

### TOP 3 TYPES OF TRIPS



### INTENDED LENGTH OF STAY AND BUDGET



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

### TOP 5 EUROPEAN DESTINATIONS\*\*

Germany	10%
France	8%
Belgium	7%
Spain	7%
Austria	5%

▼ 3%\*

\* 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)

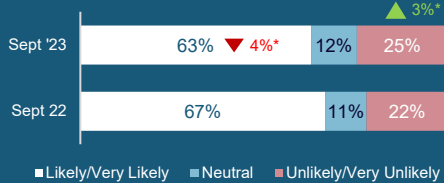
# SNAPSHOT: FRENCH TRAVEL PLANS

Travel horizon: October 2023-March 2024

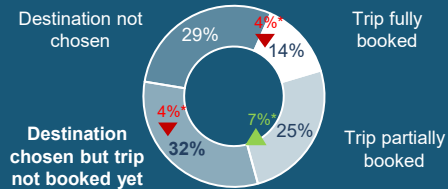


## TRAVEL SENTIMENT

### INTENTION TO TRAVEL



### TRAVEL READINESS

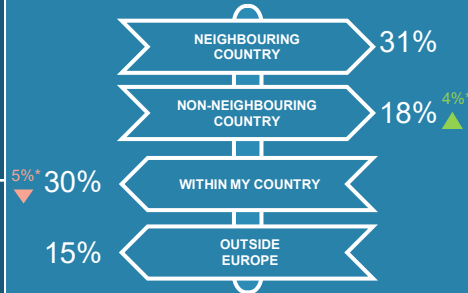


### POPULAR TRAVEL PERIODS

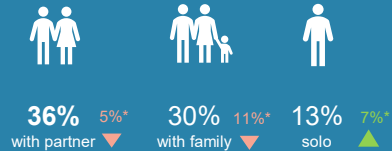


## TRAVEL PLANNING

### WHERE TO?

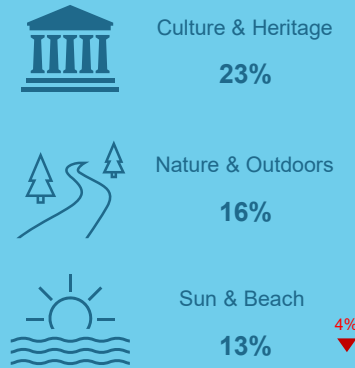


### TRAVELLING WITH?

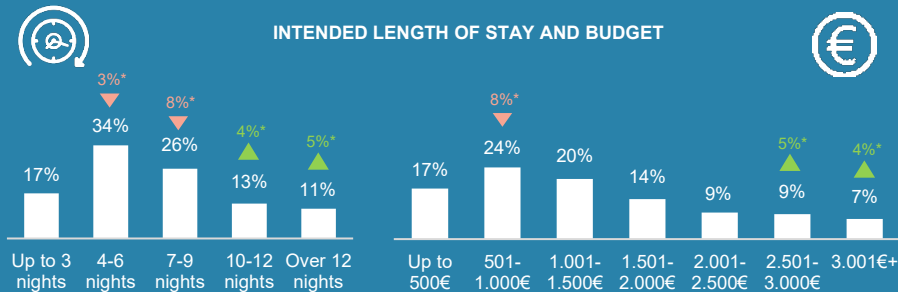


## PREFERRED TYPES OF TRIPS & DESTINATIONS

### TOP 3 TYPES OF TRIPS



### INTENDED LENGTH OF STAY AND BUDGET



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

### TOP 5 EUROPEAN DESTINATIONS\*\*

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

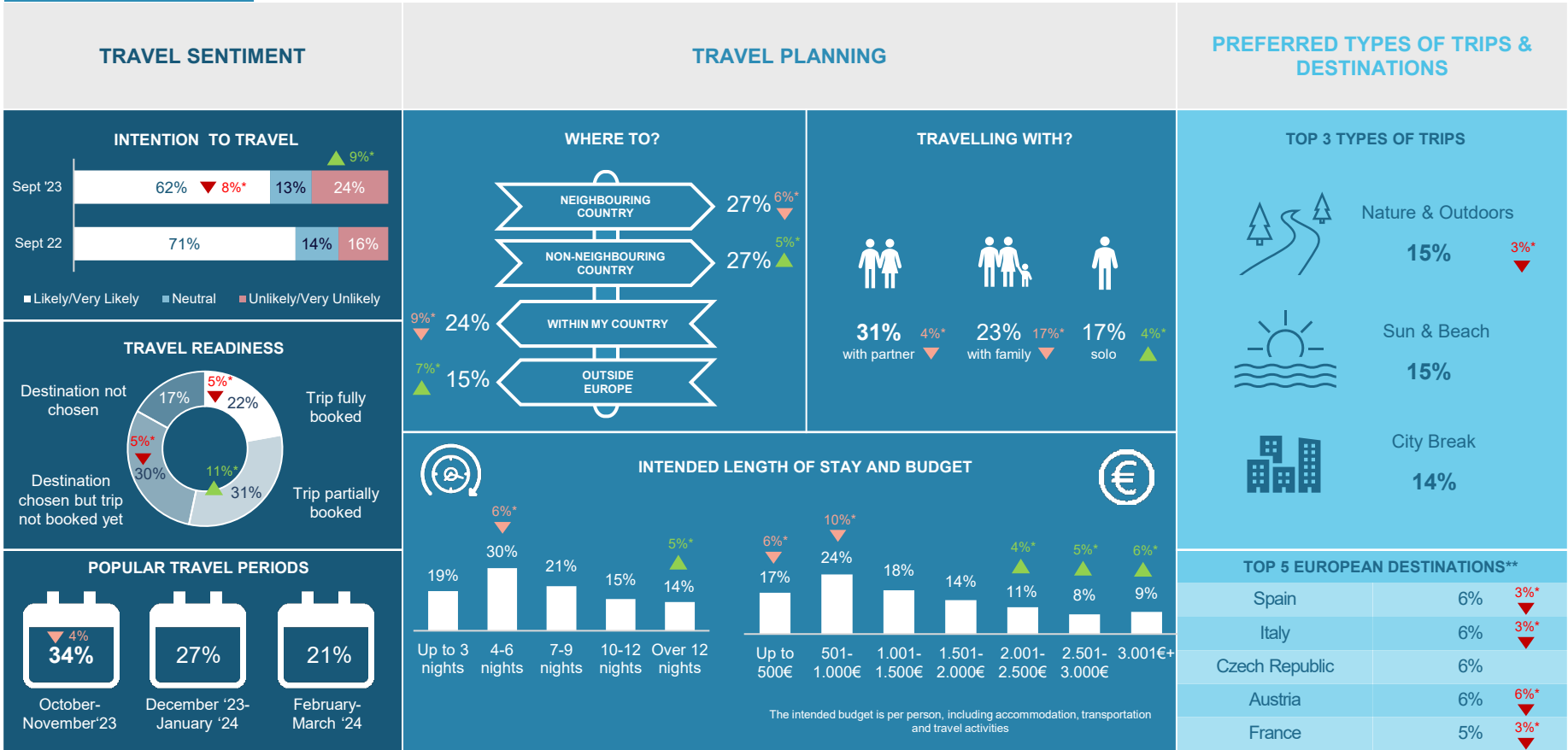
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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



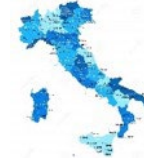
\* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

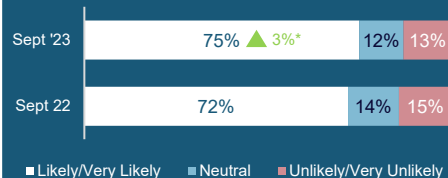
# SNAPSHOT: ITALIAN TRAVEL PLANS

Travel horizon: October 2023-March 2024

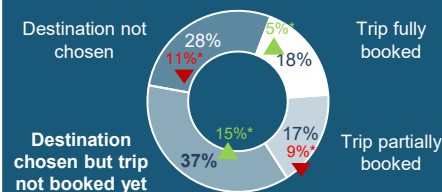


## TRAVEL SENTIMENT

### INTENTION TO TRAVEL



### TRAVEL READINESS

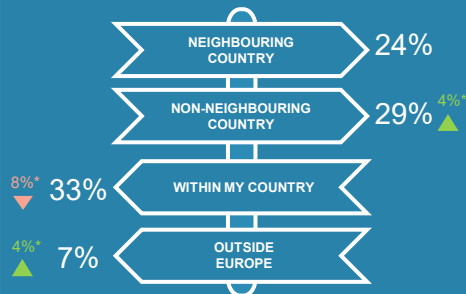


### POPULAR TRAVEL PERIODS

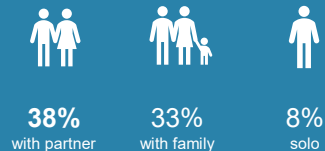


## TRAVEL PLANNING

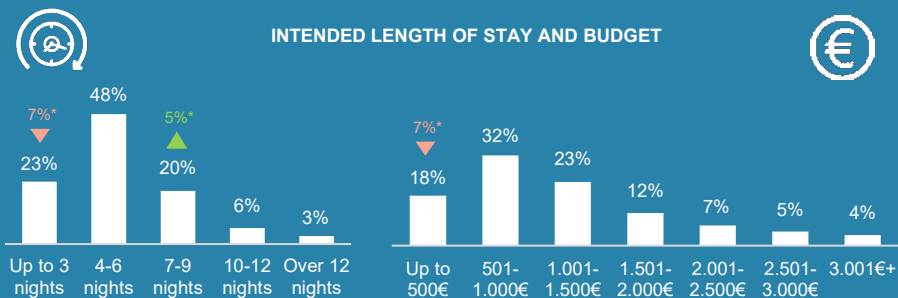
### WHERE TO?



### TRAVELLING WITH?



### 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



### TOP 5 EUROPEAN DESTINATIONS\*\*

France	10%	▼ 4%*
Spain	10%	
Germany	6%	▼ 3%*
Austria	6%	
Greece	5%	

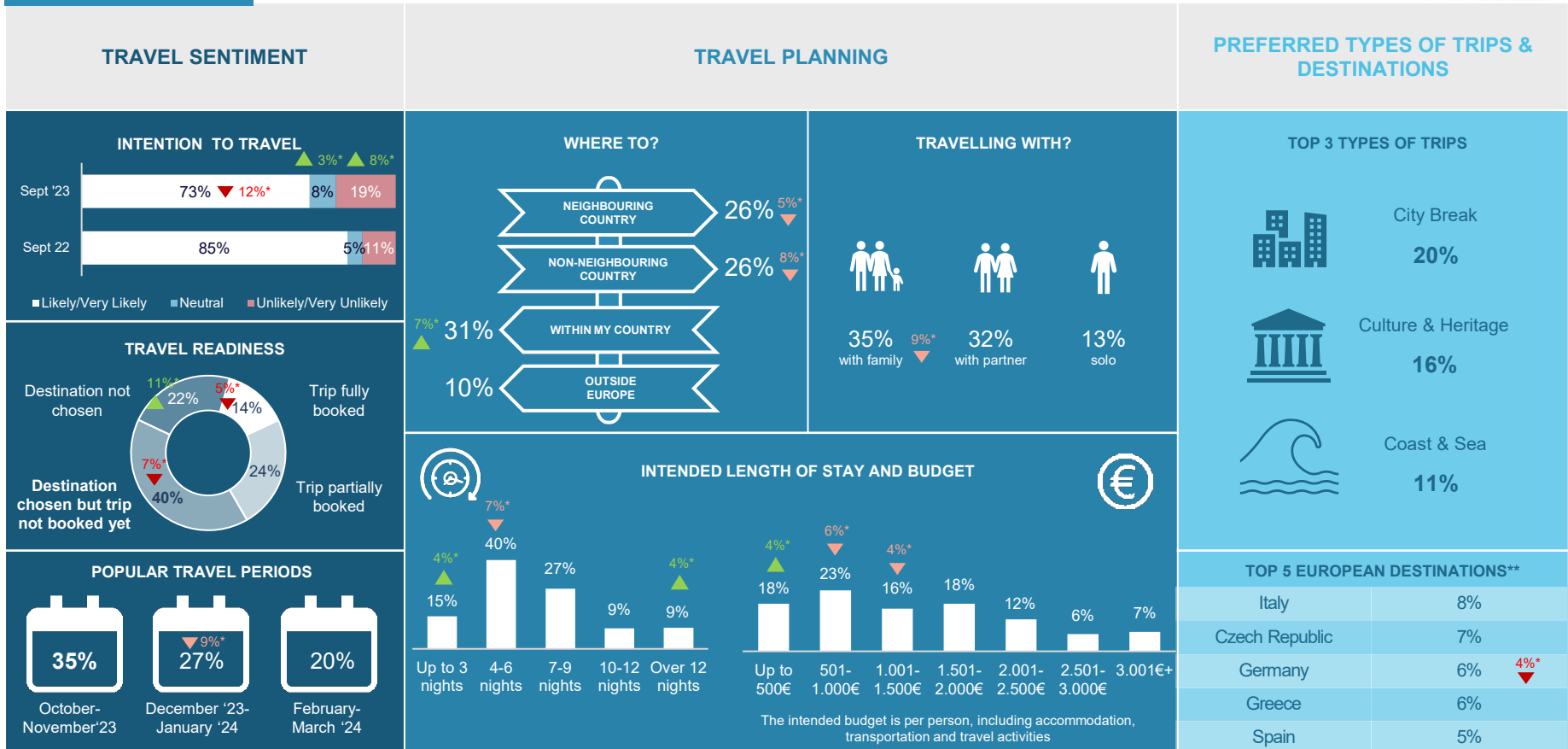
\* Significant increase ▲ or decrease ▼ vs the same time last year

\*\* 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



\* 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)



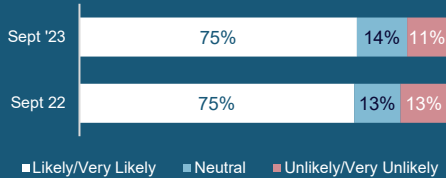
# SNAPSHOT: SPANISH TRAVEL PLANS

Travel horizon: October 2023-March 2024

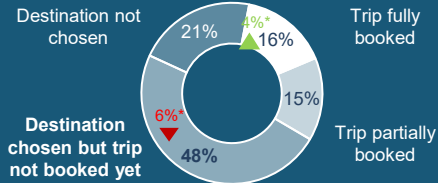


## TRAVEL SENTIMENT

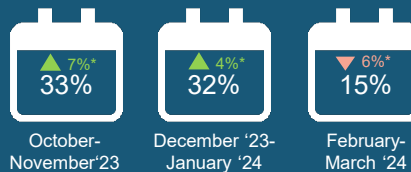
### INTENTION TO TRAVEL



### TRAVEL READINESS

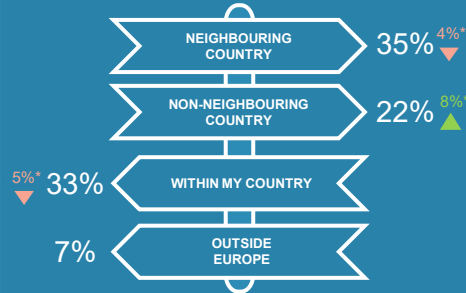


### POPULAR TRAVEL PERIODS

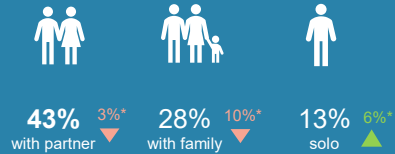


## TRAVEL PLANNING

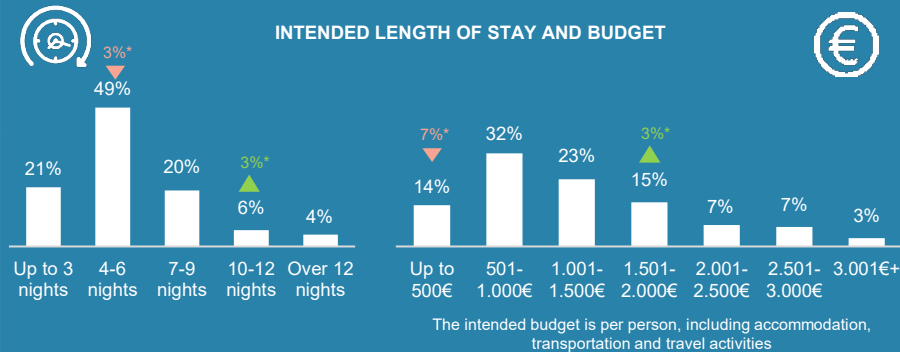
### WHERE TO?



### TRAVELLING WITH?

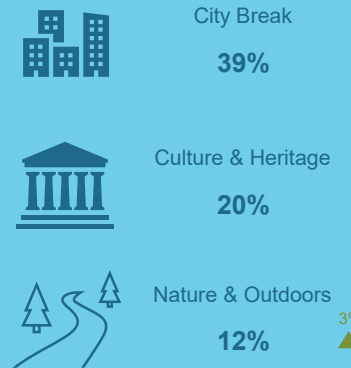


### INTENDED LENGTH OF STAY AND BUDGET



## PREFERRED TYPES OF TRIPS & DESTINATIONS

### TOP 3 TYPES OF TRIPS



### TOP 5 EUROPEAN DESTINATIONS\*\*

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

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

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

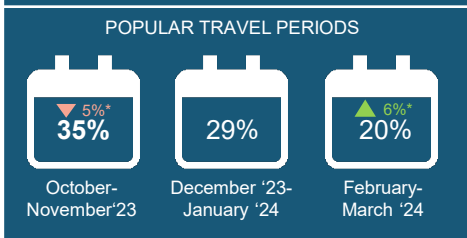
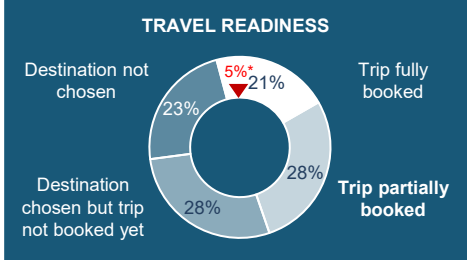
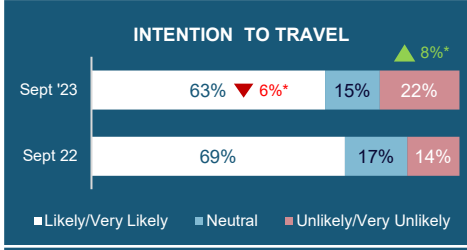
No. of respondents: 500 (total sample of respondents per country)

# SNAPSHOT: SWISS TRAVEL PLANS

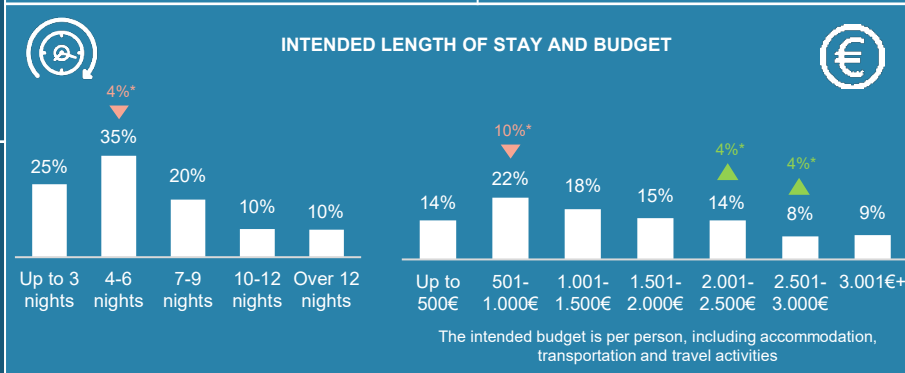
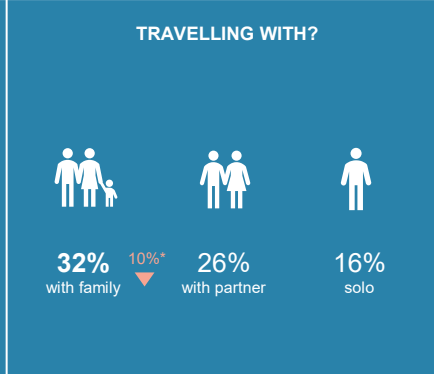
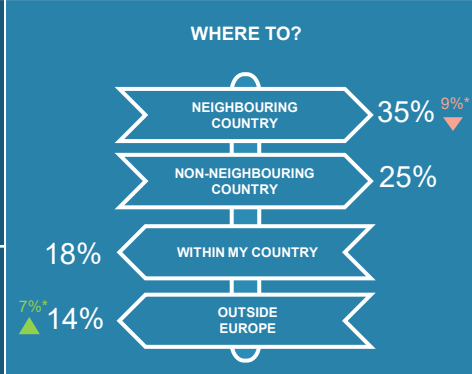
Travel horizon: October 2023-March 2024



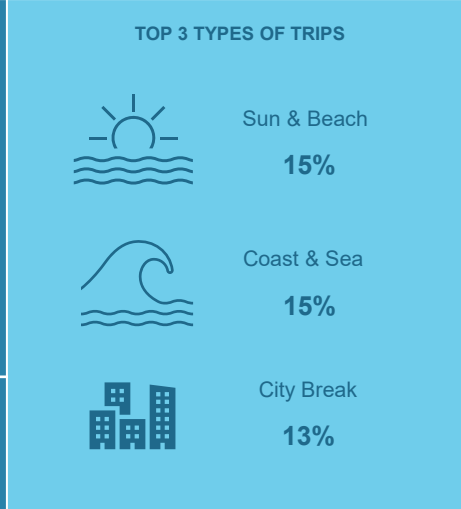
## TRAVEL SENTIMENT



## TRAVEL PLANNING



## PREFERRED TYPES OF TRIPS & DESTINATIONS



### TOP 5 EUROPEAN DESTINATIONS\*\*

Destination	Percentage
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)

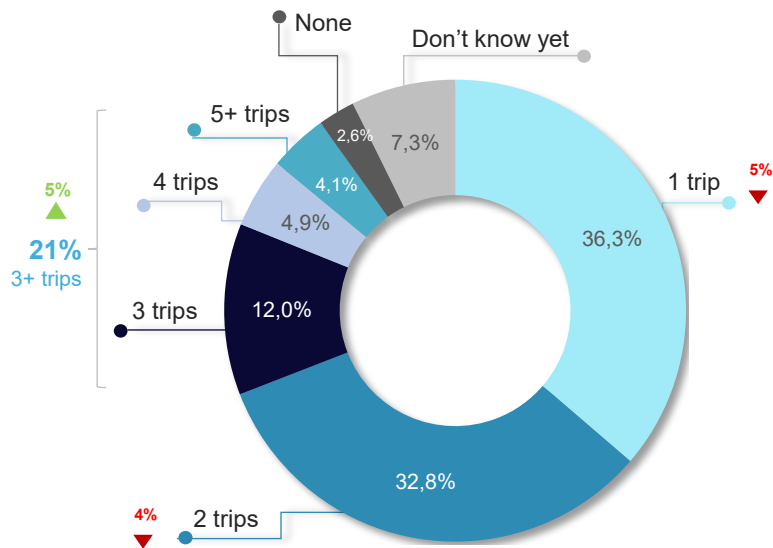
A blue-tinted photograph of a mountain valley. In the foreground, there is a grassy field. In the middle ground, several wooden huts or chalets are visible, some with balconies. The background features steep, rocky mountains under a cloudy sky. A large, white, stylized graphic element, resembling a double '0' or a heart shape, is overlaid on the right side of the image. A small teal vertical bar is on the left edge.

# PLANNING THE DETAILS



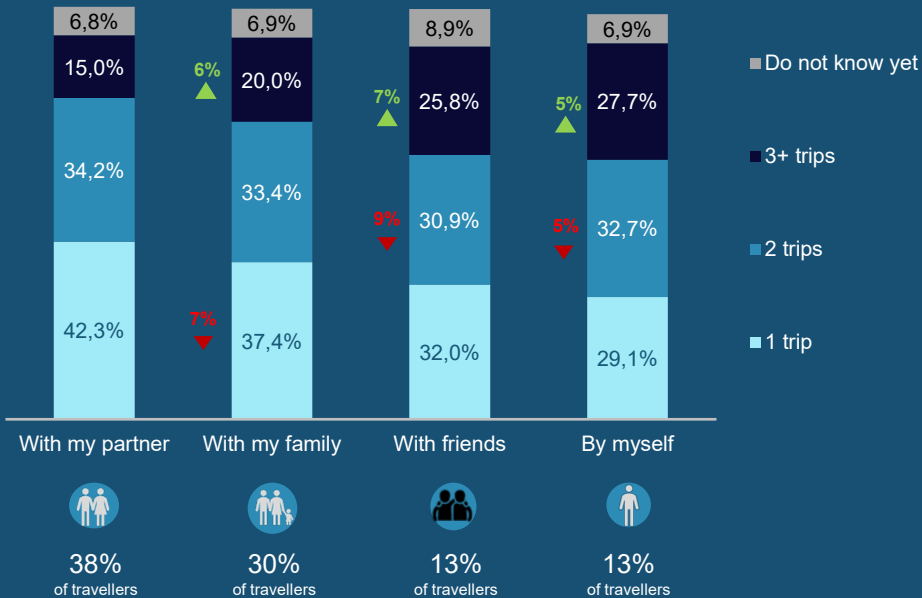
**36% of Europeans plan to travel once by March 2024 (-5% vs a year ago); taking three or more trips is up by 5% - mainly among Europeans travelling solo or with their friends**

**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)**



18 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%\*



**France**

49.4%

▼ 8%\*



**UK**

71.3%

▲ 5%\*



**Poland**

45.9%

▼ 5%\*

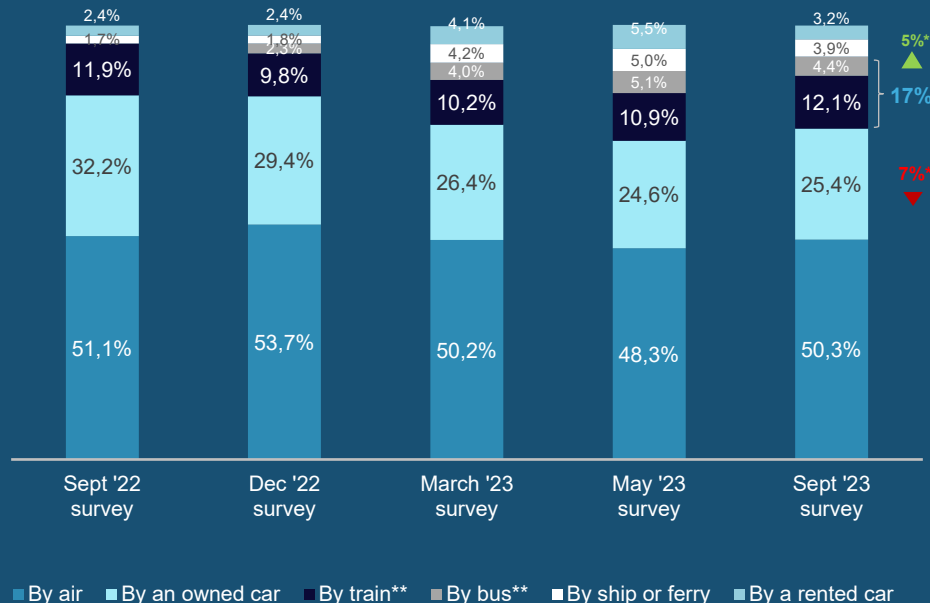


**Italy**

68.6%

▲ 3%\*

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

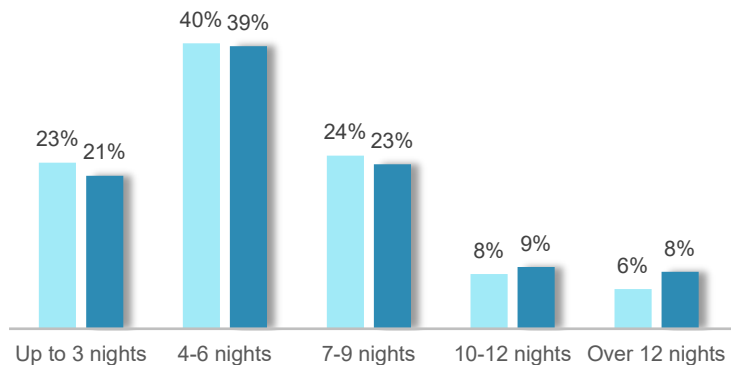


\*Statistically significant difference vs a year ago (Sept 2022)

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

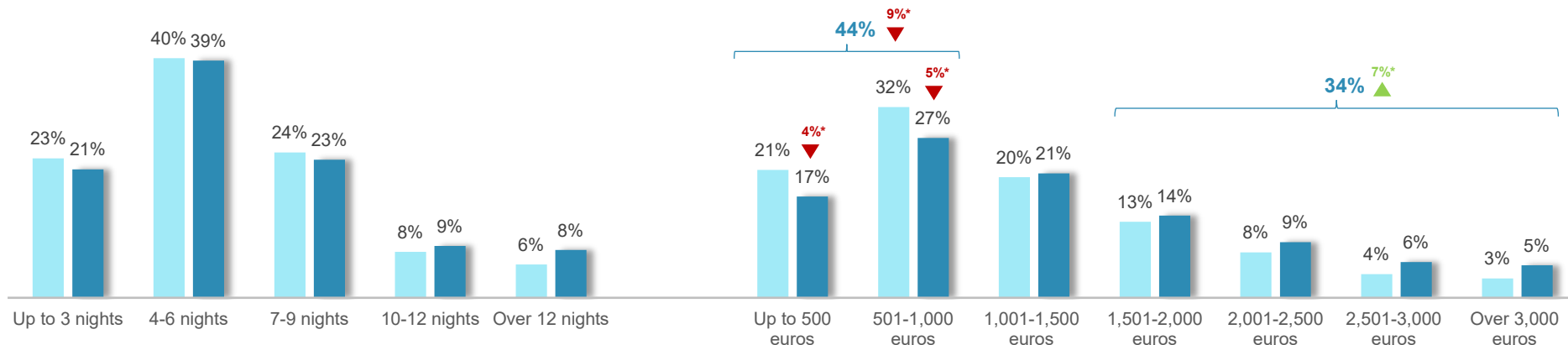
## The anticipated duration of holidays remains the same while spending increases: more travellers are budgeting over 1,500 euros per trip, while budgets of up to 1,000 euros are on the decline

### Intended length of stay (nights)



### Planned budget

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



■ Sept '22 survey

■ Sept '23 survey

### 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

## 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

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

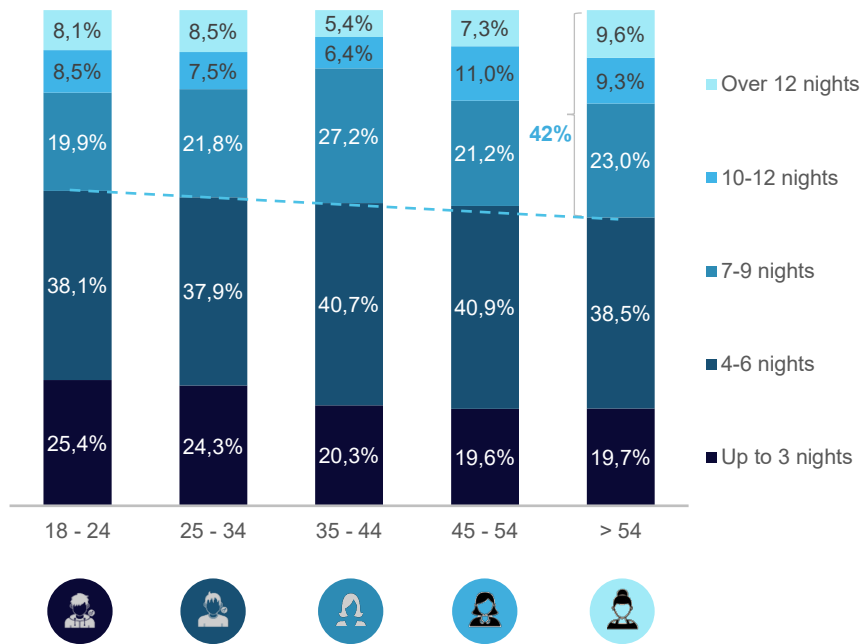
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?



## The mature travellers are the ones envisaging longer stays



### Intended length of stay (nights)

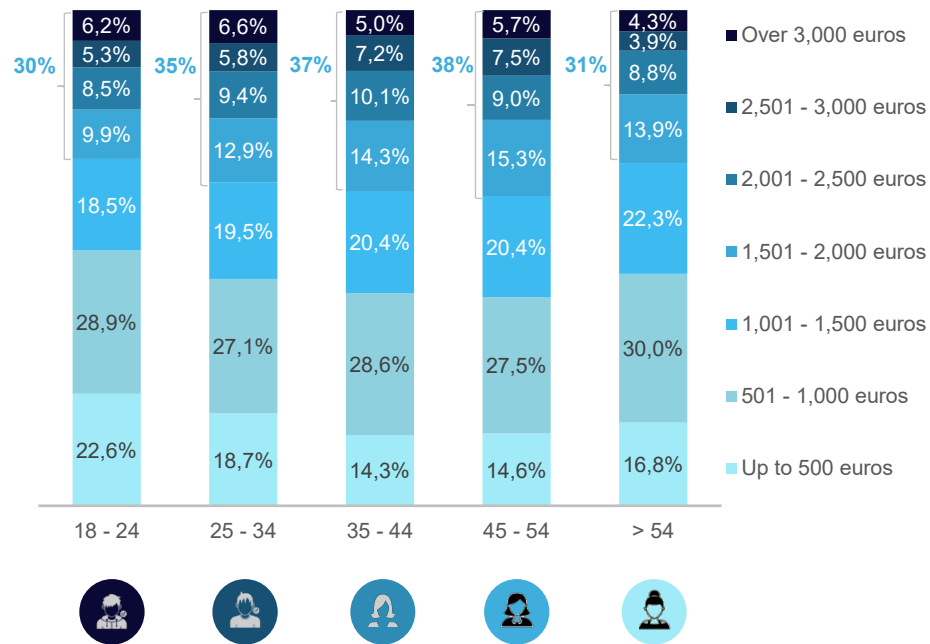


## Europeans aged 25-54 are more likely to spend over 1,500 euros on their trip



### Envisaged budget

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



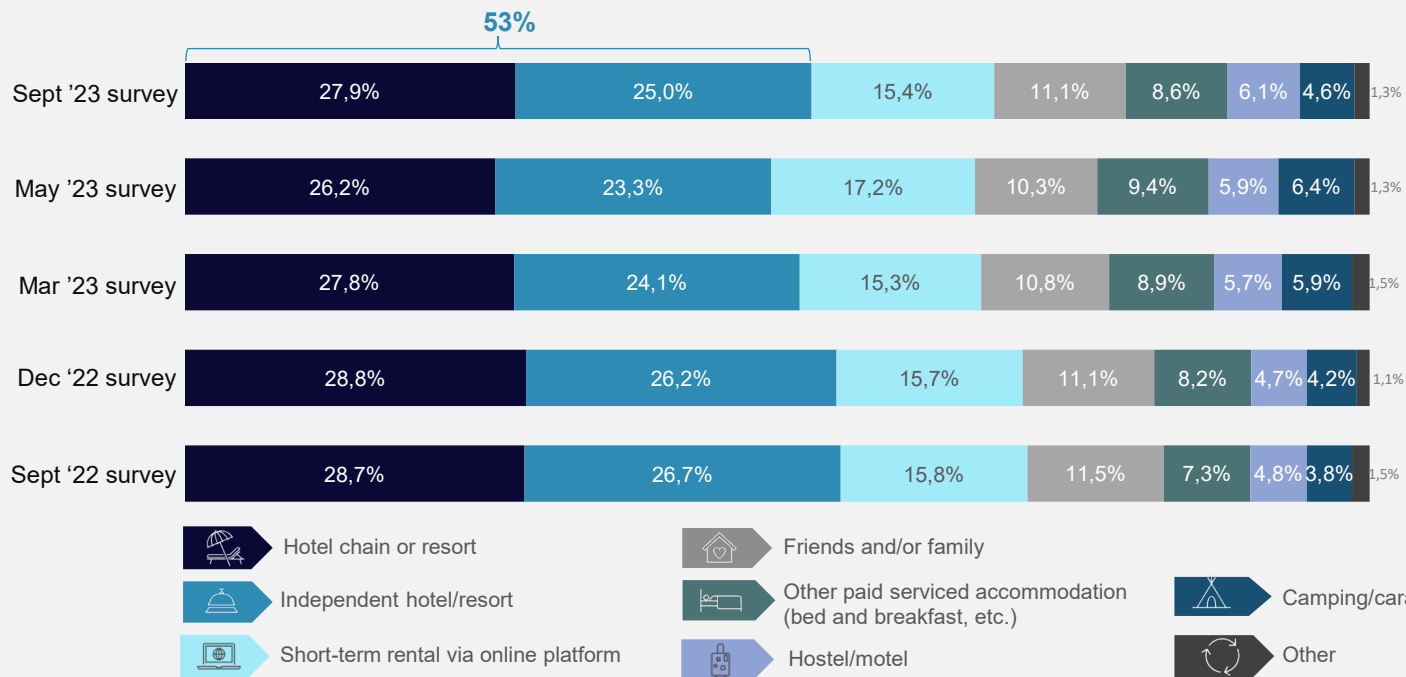
22 Q17. What would be the length of your next overnight trip?

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



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

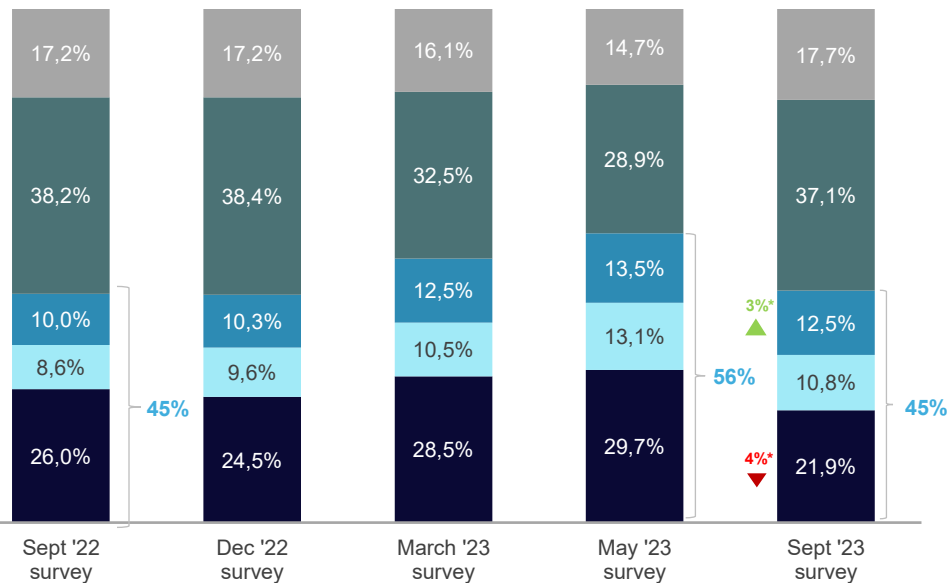
Preferred type of accommodation for respondents most likely to travel in the next 6 months



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

## 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

### Planning status for the next trip



I have not yet chosen where I will travel next



I have chosen where I want to go but not yet booked/arranged my trip



I have booked/arranged the accommodation for my next trip



I have booked/arranged the transportation for my next trip



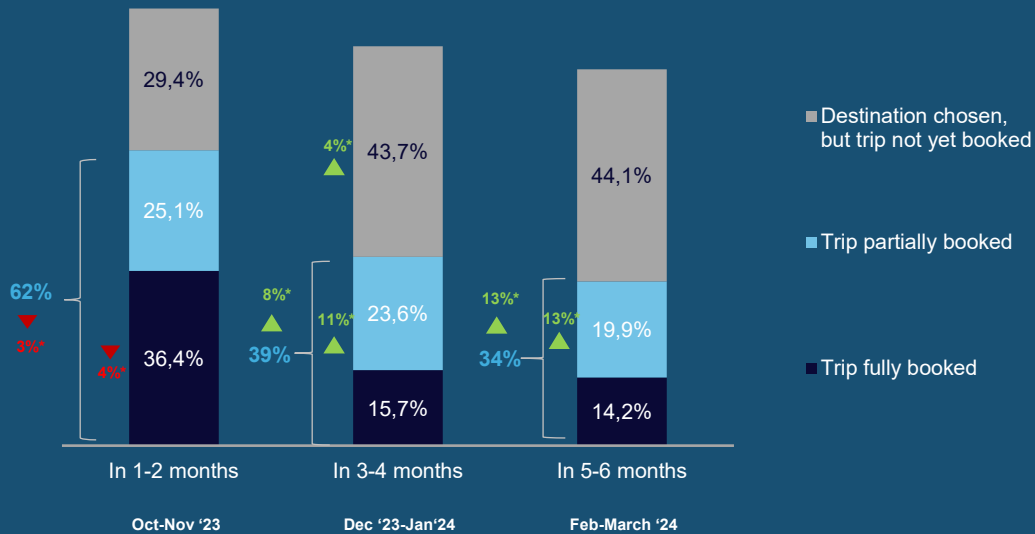
I have booked/arranged all travel and accommodation components for my next trip

### The type of trip may determine the time of booking

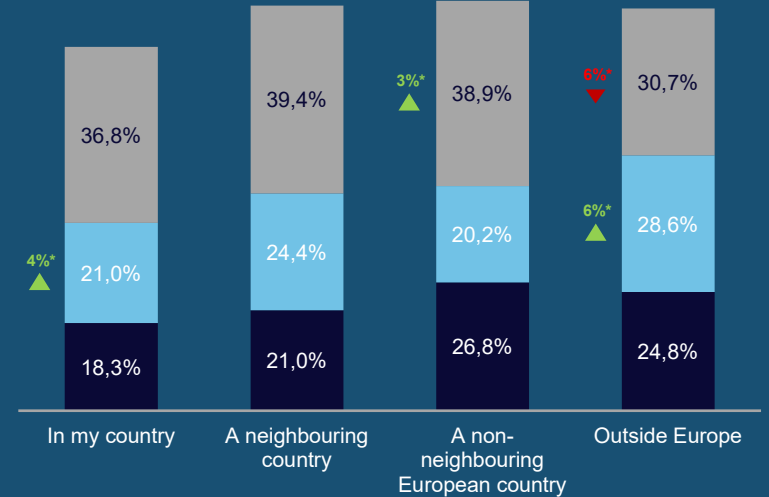
Those who choose cruises (56%), beach breaks (44%) and wellness trips (44%) are more likely to book ahead, compared to holiday makers who prefer culture and heritage (37%) or city breaks (38%).

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

## Booking status and timing of next trip



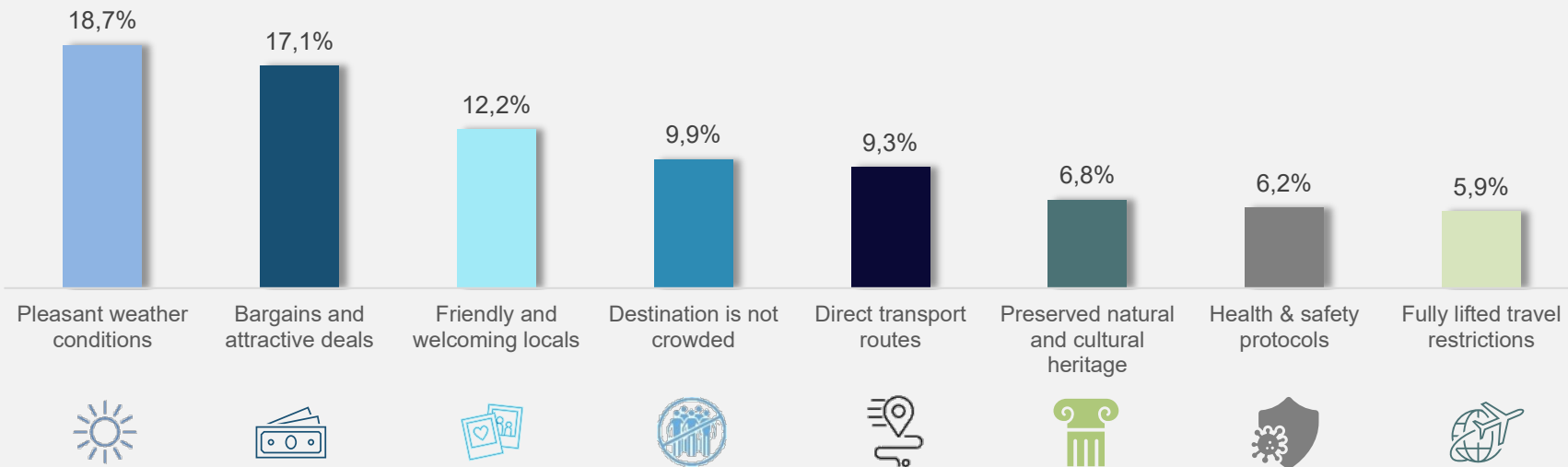
## Booking status and travel destination



Sept '23 survey

## 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)

No. of respondents: 5,993



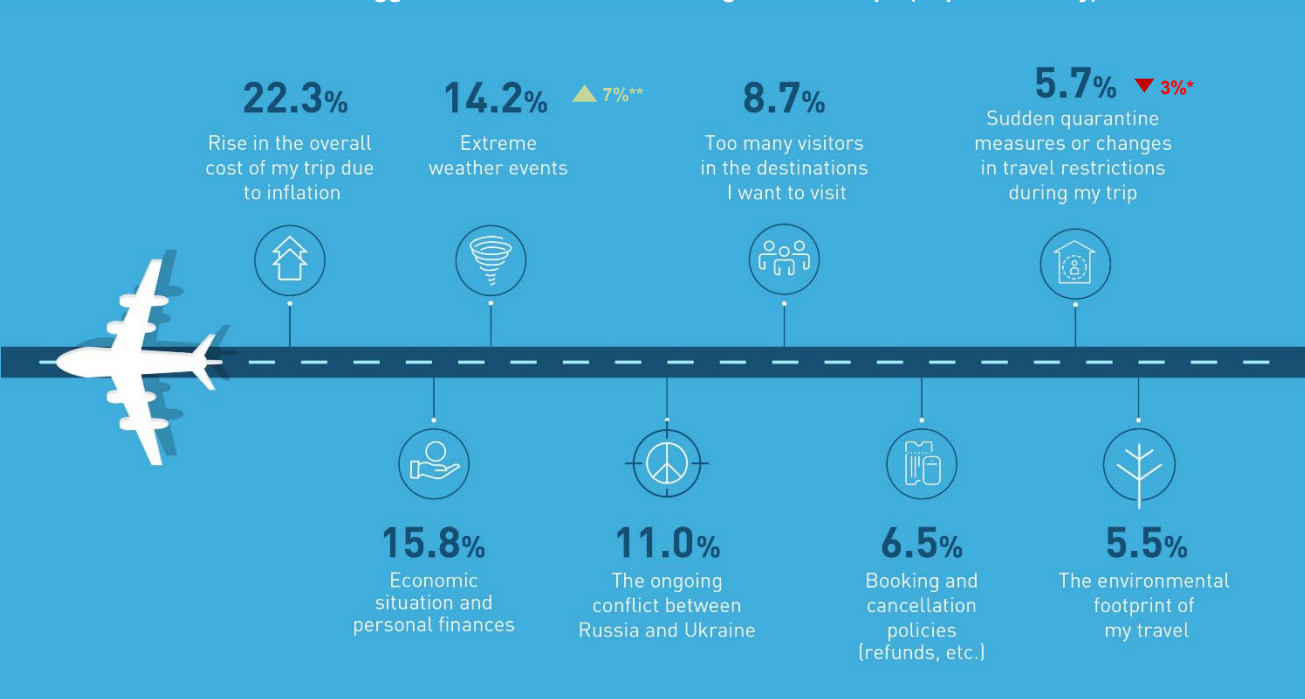
TRAVEL  
CONCERNS

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

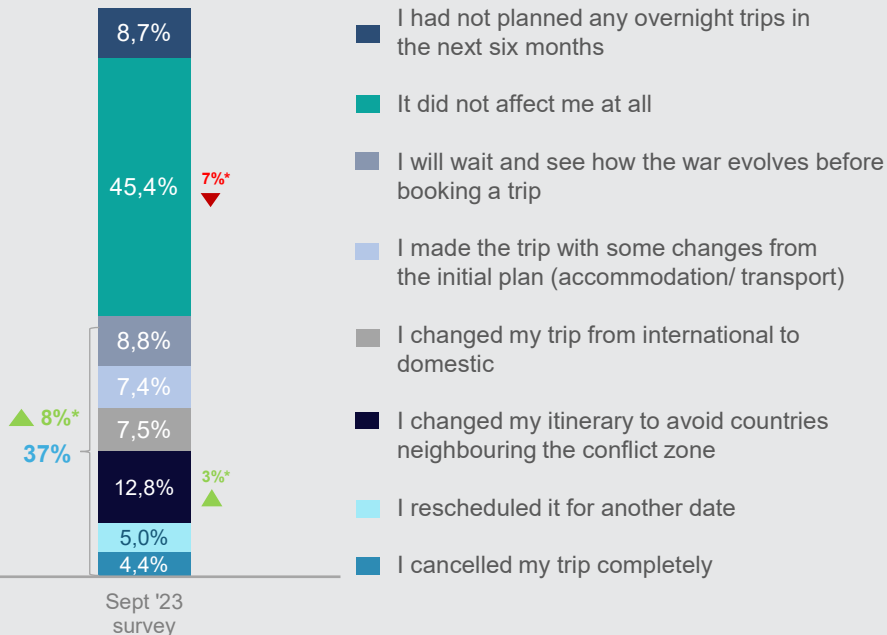
- Poland 27%
- Spain 24%
- Italy 24%
- France 24%

Top 4 markets concerned with personal finances

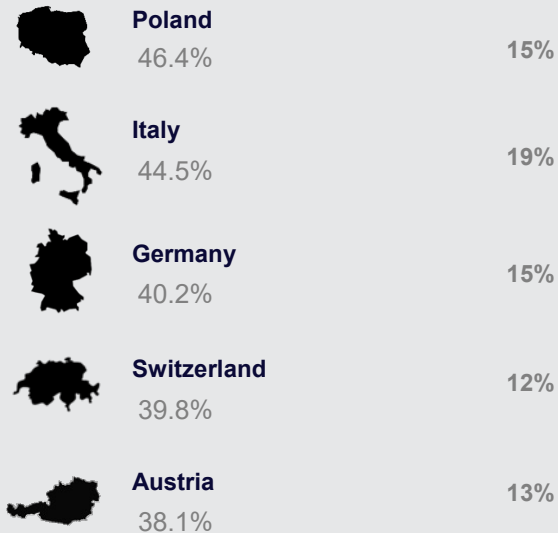
- Poland 17%
- UK 17%
- Spain 16%
- Belgium 16%

# 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?



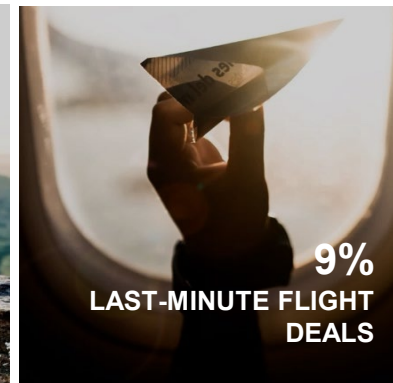
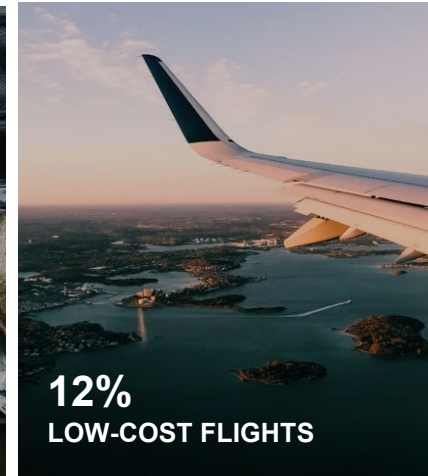
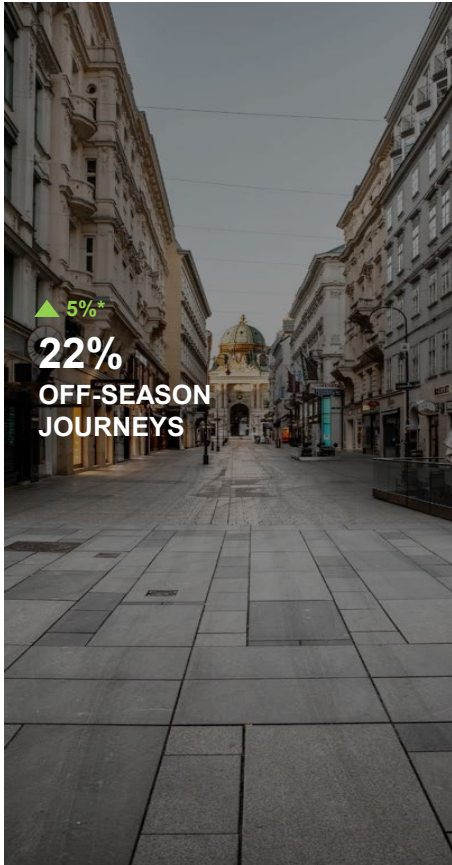
## Top 5 markets changing their travel plans



## Most often mentioned change:

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

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



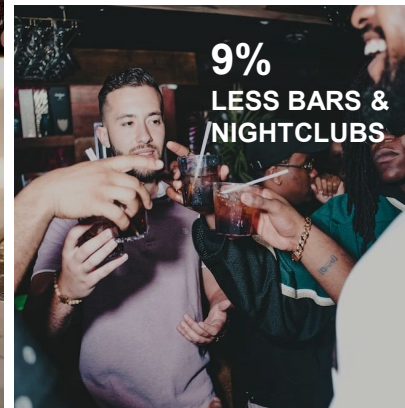
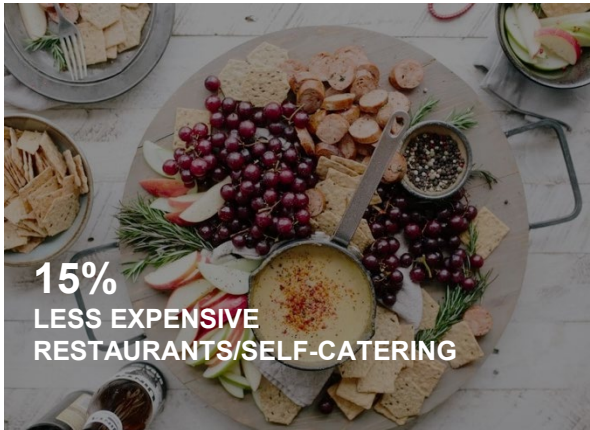
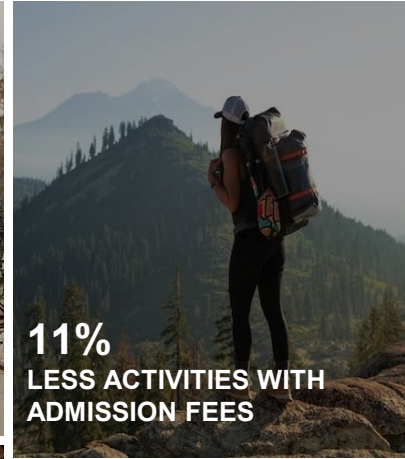
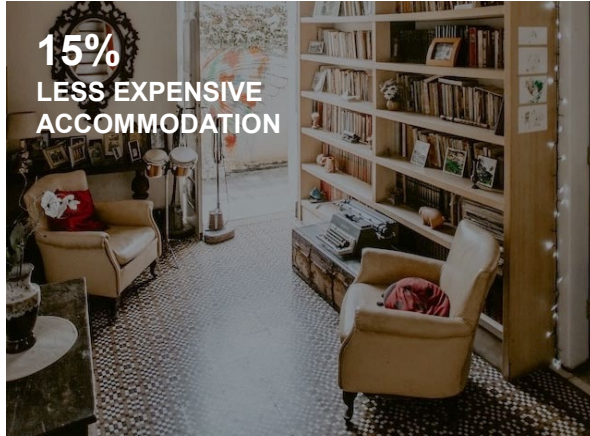
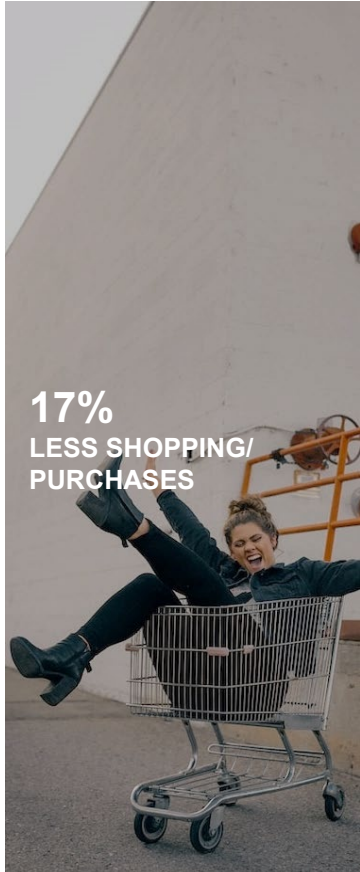
Q19. In the context of inflation and rising travel costs, which of the following travel behaviours are you most likely to adopt before reaching your next destination?

\* Statistically significant difference vs May 2023

No. of respondents: 4,052

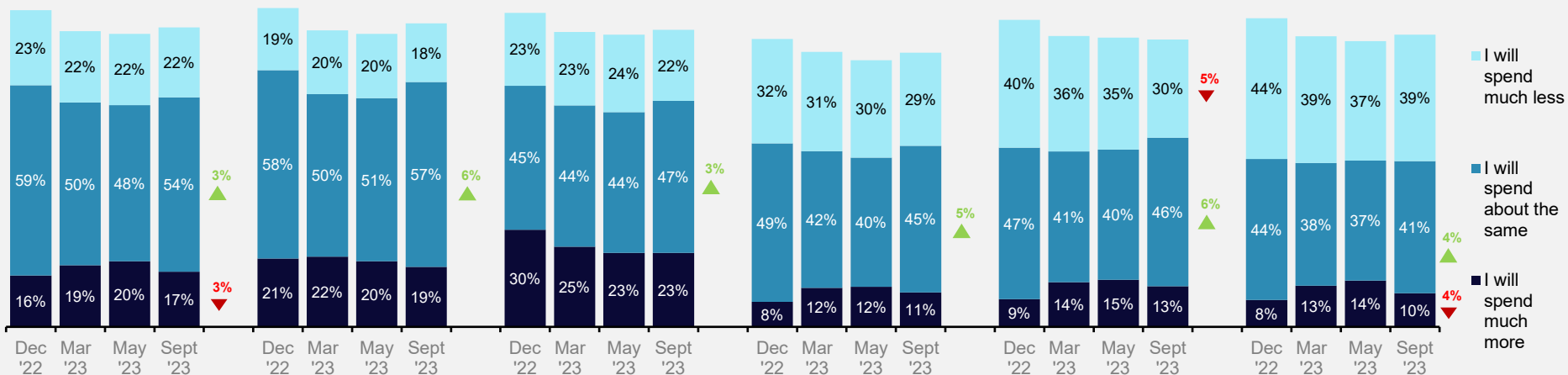


# THE IN-DESTINATION BEHAVIOR IS CHANGING TOO TO FIT WITHIN THE AVAILABLE BUDGET



# 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



**Travelling**  
(domestic or international)

**Food & home supplies**  
(groceries)

**Energy & fuel**  
(for home or vehicle)

**Sports & personal care**  
(e.g., gym subscription, hairdressers)

**Leisure activities**  
(e.g., theatre, concerts, restaurants, bars, etc.)

**Shopping**  
(clothes, electronics & other retail goods)



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)



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	<b>781</b>
	25 - 34	136	112	73	143	128	152	106	129	133	139	<b>1,251</b>
	35 - 44	126	134	103	115	140	150	120	82	105	93	<b>1,168</b>
	45 - 54	138	168	105	76	146	168	92	111	103	84	<b>1,191</b>
	≥55	262	266	175	78	240	188	126	99	71	97	<b>1,602</b>
Total		<b>750</b>	<b>750</b>	<b>500</b>	<b>500</b>	<b>750</b>	<b>750</b>	<b>500</b>	<b>500</b>	<b>493</b>	<b>500</b>	<b>5,993</b>

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## Study on Monitoring Sentiment for Intra-European Travel

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