MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 11 | 04/22

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

WAVE 11
RESEARCH OUTLINE

This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe. Results in this report are based on data collected in early March, during the 2nd and 3rd weeks of the war in Ukraine*. However, this does not seem to have significantly affected Europeans' travel sentiment and behaviour. More specifically:

- **The survey results are optimistic and reflect a solid desire to travel**. A slight increase in Europeans' concern over the economic situation and their personal finances is not statistically significant compared to previous survey periods.
- Europeans' most preferred destinations continue to be Western and Southern European countries, especially for spring & summer vacations. **Travel preference to Eastern European countries remains similar to a year ago** (February 2021).
- Analysis of trip timings and destinations does not reveal any significant differences compared to previous periods.

NOTE: Polish respondents (n=501) express above-European-average travel intentions (82% vs 77%) in Wave 11. Their interest in travelling during the summer months is similar to other markets, and their slightly higher interest in domestic travel (34% vs 31%) is parallel to Wave 10 (December 2021).

* The data collection and research methodology are detailed in the methodological annex (slide 44)

WAVE 11
RESEARCH HIGHLIGHTS

- **Europeans' travel sentiment climbs to new heights, with 3 in 4 Europeans planning to travel by September 2022**. Furthermore, leisure travel reaches its highest level (76%) since August 2020.
- Despite the drop in COVID-19 cases during the data collection, **the importance of the EU Digital Covid Certificate (60%) and vaccine roll-out (59%) in enabling travel increases**.
- In contrast, and for the first time since August 2020, COVID-19 vaccination is no longer the leading confidence booster for travelling, having been replaced by **flexible cancellation policies and fully-lifted travel restrictions**.
- As Europeans are learning to live with the pandemic and travel restrictions are being lifted, **the share of those realising their travel plans without any change (27%) achieves an all-time-high**.

WAVE 11
RESEARCH HIGHLIGHTS

- With summer holidays in mind, **70% of 'travel-ready' Europeans* will travel between June and September 2022; intra-European tourism is the preferred choice for 56% of them**.
- Europeans' interest in Mediterranean destinations peaks, with **Spain, Italy and France featuring as the most popular countries**.
- **Sun & Beach holidays (22%) are Europeans' top choice** for the upcoming summer, followed by City Breaks (15%) and Coast & Sea trips (15%).
- As summer approaches, **family travel (40%) is gaining popularity over travelling with one's partner (37%)**; 49% of Sun & Beach travellers will go on vacation with their families.
- **Europeans' preferences for air travel increased by 7%**, compared to the December 2021 survey, At the same time, the interest in train and bus travel (8%) has dropped to their lowest levels since August 2020, a prerequisite for increasing tourism-transportation generated CO^2 emissions for the first time since 2019.

* 'Travel-ready' Europeans refers to respondents planning to travel in the next 6 months

WAVE 11
RESEARCH HIGHLIGHTS

- **Trips of 4-6 nights remain the top choice for 33% of Europeans who plan to travel**, whereas 25% will opt for trips of 10 nights or longer.
- The share of travellers planning to spend 500-1,500 euros rises by 8%, while **the share of those ready to spend over 2,000 euros drops by 8%,** potentially due to inflation concerns.
- **Just 25% of travel-ready Europeans have fully booked their next trip**, indicating a limited level of travel commitment and some potential impact of the war in Ukraine.
- Despite the drop in COVID-19 cases during data collection, **2 in 3 travel-ready Europeans still feel safer and more relaxed with strict health & safety protocols** (+8%).

WAVE 11
RECOMMENDATIONS FOR DESTINATIONS

- Destinations and companies using age-based segmentation should recognise **the stronger travel intention of the over 45s market** (82% vs. 72% in the 18-44 age group). This segment of travellers is particularly interested in domestic travel (36% vs. 26% in the 18-44 age group) and trips that revolve around culture & history and relaxing at the coast.
- **Campaigns targeting different age groups are advised to highlight different holiday attributes:** travellers aged 18-24 care most about creating lasting memories; the 25-44 age group focuses on escaping from routine; and Europeans over 45 years old put the highest importance on enjoying life in a relaxing environment.
- To mitigate the environmental impacts of travel during the peak summer season, destinations may focus on **cooperation with rail companies** and promote **alternatives to air travel** for domestic visitors and visitors from neighbouring countries.
- As the war in Ukraine continues, NTBs and DMOs will need to closely follow up its impacts on travel, e.g., **prepare a crisis management plan, and target domestic travellers and foreign source markets that are less likely to be affected by the war.**

WAVE 11
RECOMMENDATIONS FOR BUSINESSES

- Tourism destinations and businesses targeting families, should consider the higher interest of this segment in Sun & Beach vacations (49%) over the following months. Most family travellers are looking for **4–9-night vacations (62%)** and have plans to spend between **500-1,500 euros (49%)**.
- 56% of Europeans have already chosen their next destination but have only partially booked their trips or not yet booked at all. By offering **appealing deals and bargains** and **using re-marketing tools, businesses can trace back late bookers and assist them in the conversion process**.
- The importance of flexible cancellations policies increased significantly compared to the previous survey. Given the uncertainty ignited by the war in Ukraine, **businesses are advised to provide even more flexible cancellation policies, especially when promoting travel products for June-July**.
- **Strict health & safety protocols should remain of high importance**, particularly for spas and wellness centres, cultural attractions and heritage sites.

CONTENTS

How to read

Wave 10

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

	Wave 8	Wave 9	Wave 10	Wave 11
Surveys dates	13-23 July 2021	10-18 Sep '21	23-31 Dec '21	1-9 March '22

2. To present Wave 11 '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; April-May 2022
    - In 3-4 months; June-July 2022
    - In 5-6 months; August-September 2022
3. To present data and insights, the following distinct groups have been analysed:
    - Total respondents; 5,998
    - Respondents with short-term travel plans/most likely to travel in the next 6 months ('early-bird' travellers/ 'travel-ready' Europeans); 4,606
    - Respondents selecting outbound European destinations; 4,401
4. Significant changes between current and previous waves are calculated on a 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.

01 TRAVEL INTENTIONS

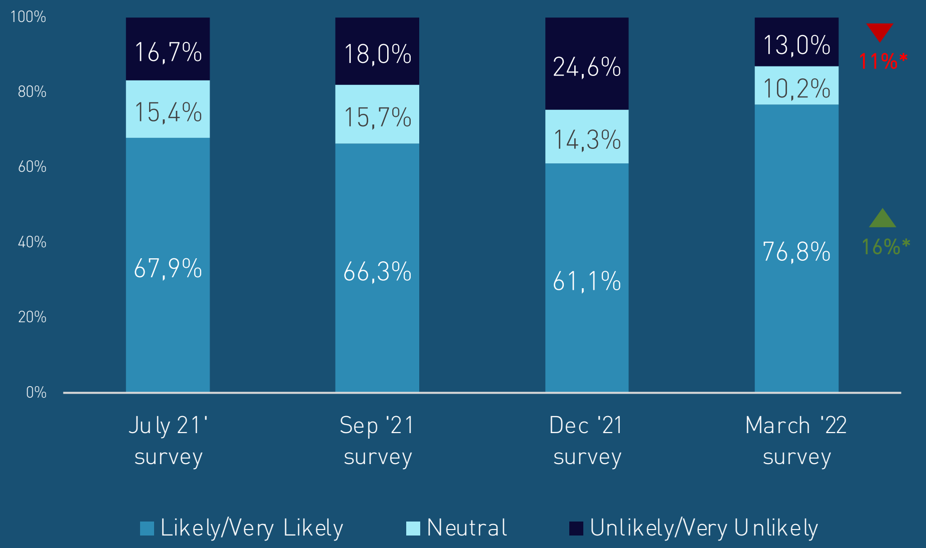
Despite the ongoing war in Ukraine, Europeans' travel sentiment climbs to new heights: over 3 in 4 Europeans plan to travel by September 2022 (+16%)

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

Italy	84.6%	▲ 18%*
Spain	83.6%	▲ 8%*
Poland	82.4%	
UK	81.8%	▲ 29%*
Germany	80.8%	▲ 20%*

Poland's travel sentiment holds steady, although it has dropped 2 places compared to the December '21 survey

Intention to travel in the next 6 months



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

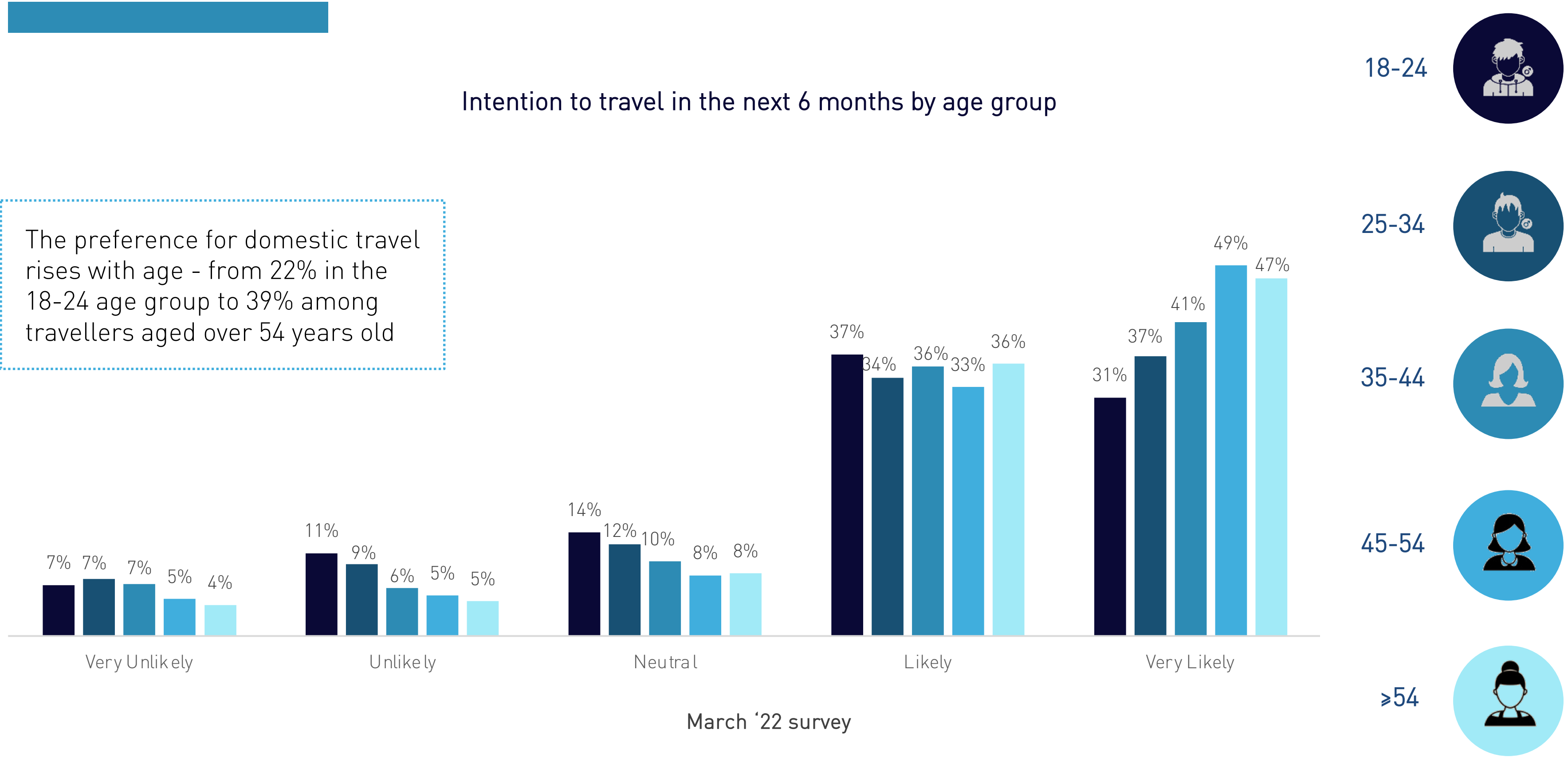
* Statistically significant difference vs previous survey period

No. of respondents: 5,998

Travel intentions increase with age, rising from 69% among Gen Z (18-24) to 83% among Baby Boomers (over 54)

The preference for domestic travel rises with age - from 22% in the 18-24 age group to 39% among travellers aged over 54 years old

Intention to travel in the next 6 months by age group



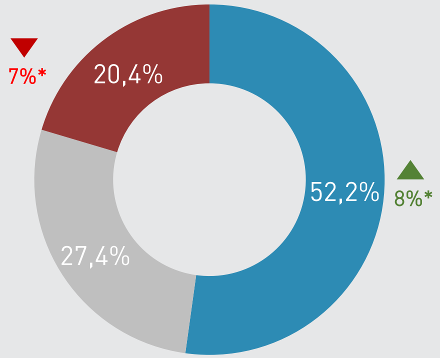
March '22 survey

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 5,998

The importance of getting vaccinated (+8%), vaccine roll-outs (+13%) and a harmonised EU Digital Covid Certificate (+8%) have increased, despite the drop in Covid-19 cases during the data collection period

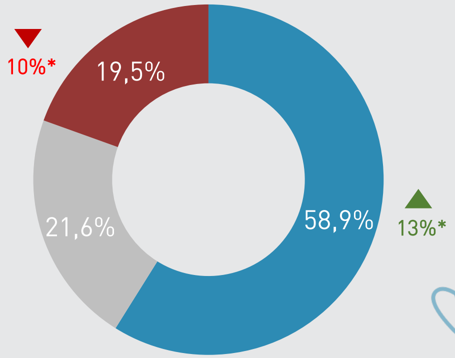
Europeans' likelihood to book a trip once vaccinated



Spain 66.2%
Italy 57.9%
Germany 56.0%

Q7. To what extent do you agree/disagree with the following statement: 'Once I get vaccinated for COVID-19, I would soon book a trip.

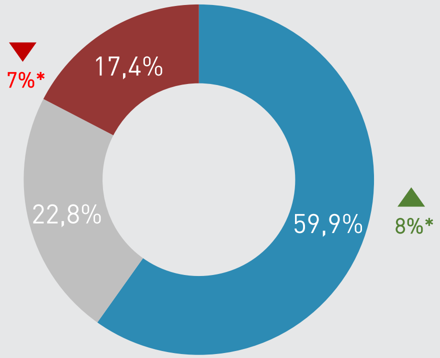
COVID-19 vaccine rollout's effect on travellers' confidence



Spain 75.2%
Italy 72.2%
UK 71.5%

Q8. To what extent do you agree/disagree with the following statement: 'Now that a vaccine for COVID-19 has been rolled out, I feel much more optimistic and confident about planning trips in the next six months'.

Sentiment of respondents towards the harmonized EU Digital Covid certificate



Spain 71.6%
Italy 71.0%
Germany 66.6%

Q9. To what extent do you agree/disagree with the following statement: 'The introduction of harmonized EU certificates [EU Digital Covid Certificate] to prove vaccination, COVID-19 recovery or testing status will facilitate travel/planning my next trip'.

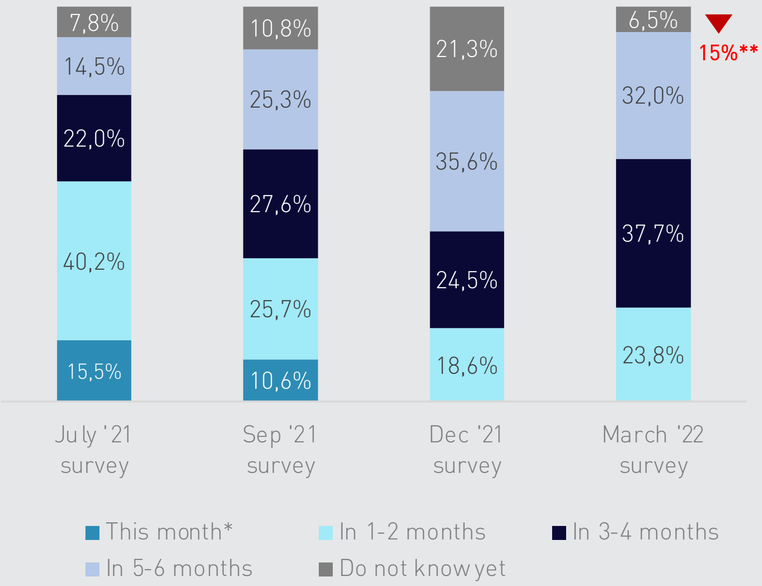
Likely/very likely Agree/Strongly agree | Neutral | Unlikely/Very unlikely Disagree/Strongly disagree

*Statistically significant difference vs previous survey period
Top-3 markets that 'Agree/Strongly agree' per question are depicted

No. of respondents: 5,998

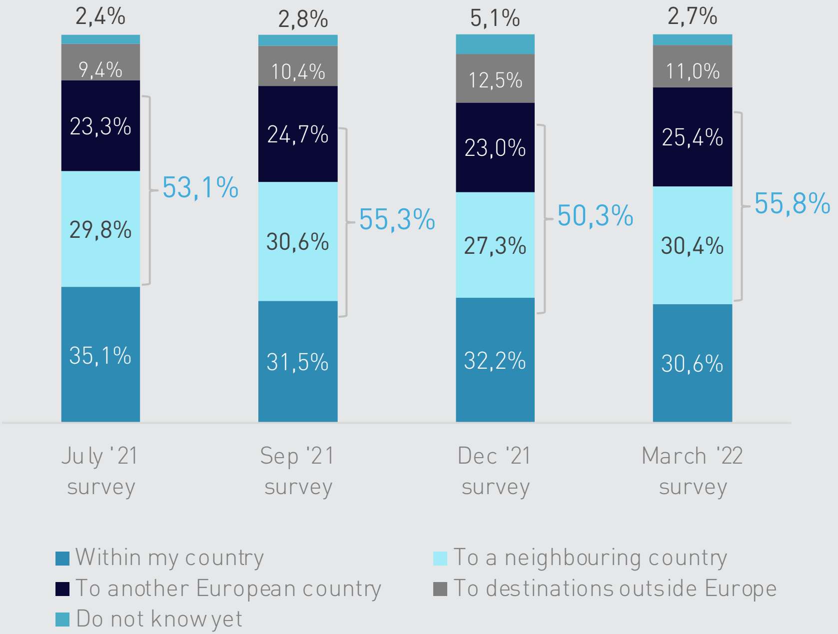
70% of Europeans choose to travel between June and September 2022, with intra-regional travel as the leading choice (56%). Uncertainty regarding the trip's timing drops to its lowest point (6.5%)

When will Europeans travel next?



Q13. When are you most likely to go on your next trip either in your country or within Europe?

Where will Europeans travel within the next 6 months?



Q14. Where do you plan to travel in the next 6 months?

* NOTE: 'This month' is excluded from answering options from Wave 10 onwards   ** Statistically significant change vs previous survey period

No. of respondents: 4,606

March ‘22 survey

PREFERRED COUNTRIES FOR EUROPEANS’ NEXT INTERNATIONAL TRIP

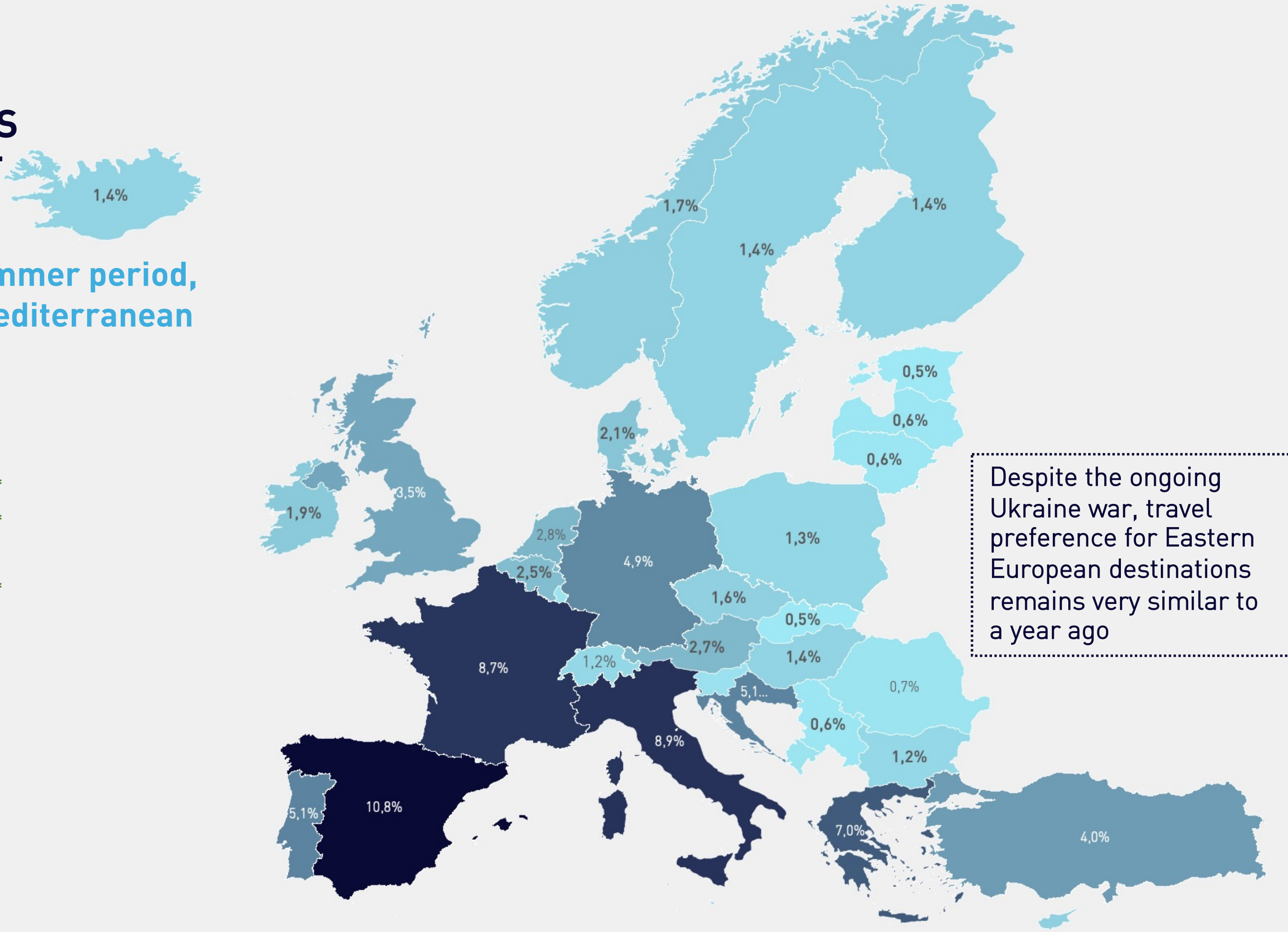
With the approaching summer period, Europeans’ interest in Mediterranean destinations peaks

TOP 10 COUNTRIES

Spain	10.8%	▲ 4%*
Italy	8.9%	▲ 3%*
France	8.7%	
Greece	7.0%	▲ 3%*
Portugal	5.1%	
Croatia	5.1%	
Germany	4.9%	
Turkey	4.0%	
UK	3.5%	
Netherlands	2.8%	

*Please use this map as a reference only

No. of respondents: 4,401



Despite the ongoing Ukraine war, travel preference for Eastern European destinations remains very similar to a year ago

* Statistically significant change vs previous survey period

Q15. To which country(ies) do you plan to travel next?

Leisure travel reaches its highest level since August 2020 (+13%), while business travel shrinks

Top 3 markets to take a leisure trip

Poland

83.5%

France

82.6% 11%*

UK

80.4% 30%*

Top 3 markets to take a business trip

Switzerland

12.2%

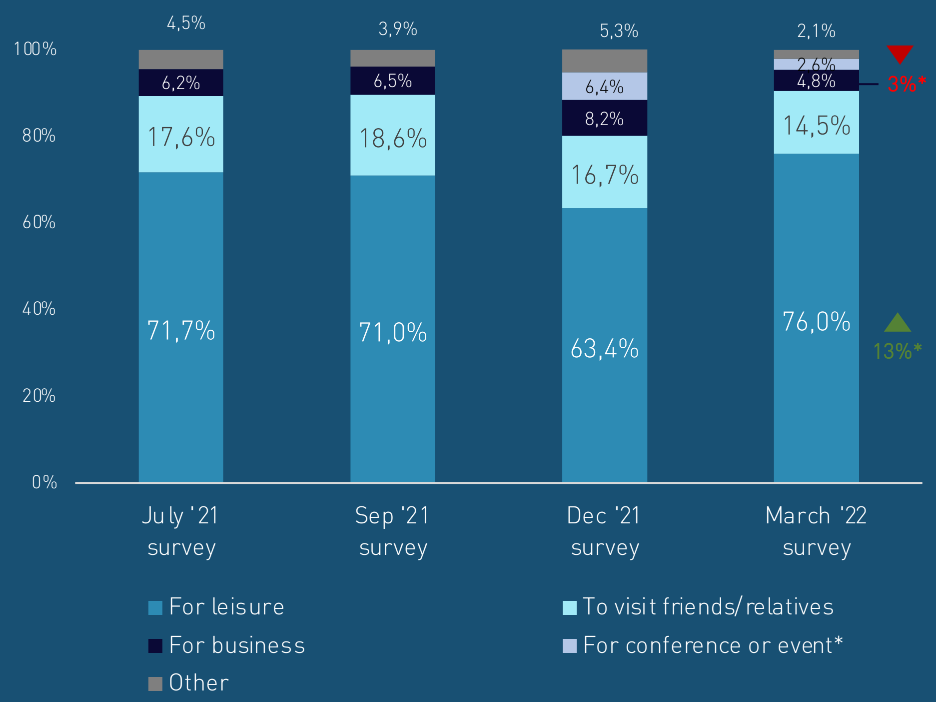
Austria

8.2%

Netherlands

5.4%

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

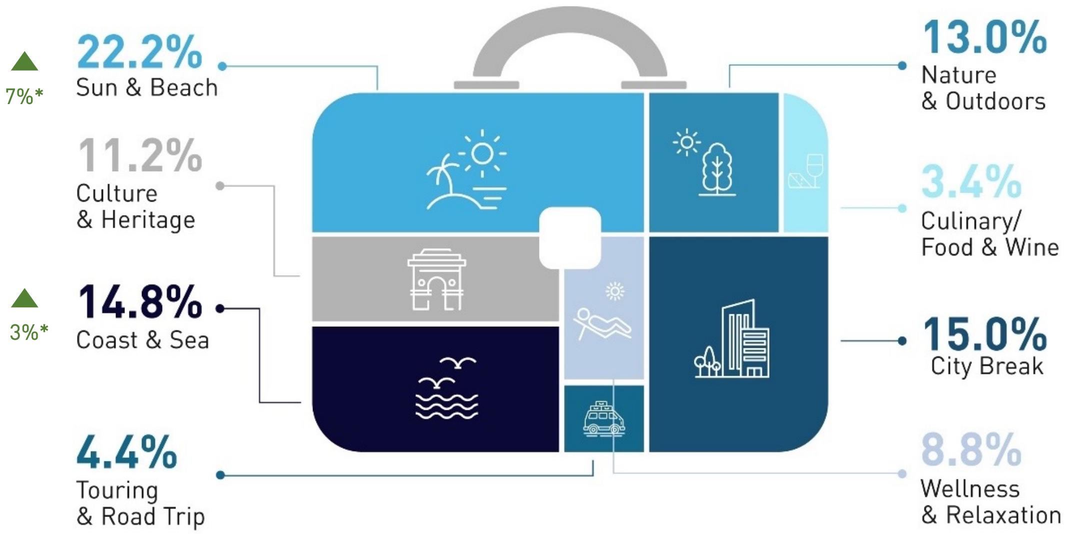


* Statistically significant difference vs previous survey period
**Up to September '21. 'For conference or event' was included in 'Other'
No. of respondents: 4,606

Q12. 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

Sun & Beach holidays (+7%) are Europeans' leading choice for the summer, followed by City Breaks and Coast & Sea trips (+3%)

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



March '22 survey

43% of Europeans travelling with their family will opt for Sun & Beach and Coast & Sea holidays

"Coast & Sea" and "Sun & Beach" holidays are separated in this survey because some destinations like the Netherlands, Denmark, the Baltic countries, etc., offer coast & sea experiences and sports (e.g. sailing) but they are not necessarily associated with sun & beach vacations and experiences like Spain, Italy, Greece, etc..

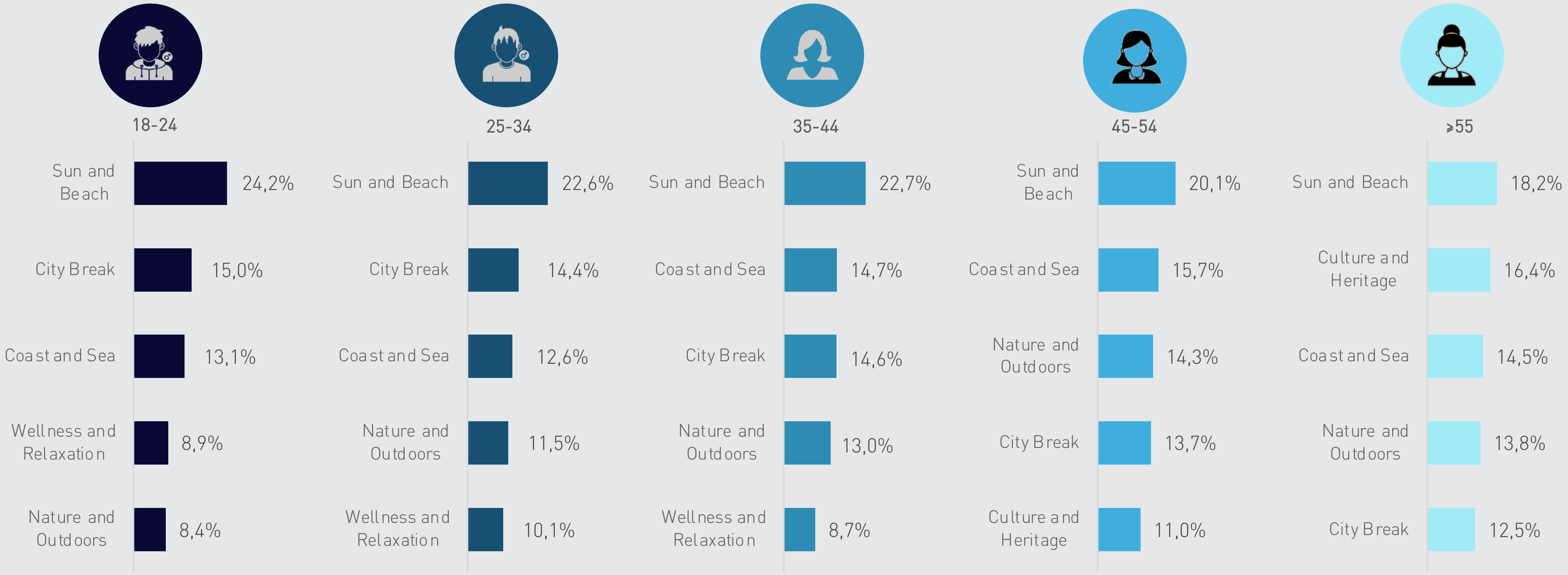
Q19. What type of leisure trip within Europe are you most likely to undertake next?

* Statistically significant difference vs previous survey period

No. of respondents: 4,606

Travellers of all ages favour Sun & Beach holidays for the next months. These preferences are particularly strong among younger generations who are also intrigued by City Breaks, while mature travellers show more variety in their desired trip type

Top 5 types of trip by age group



Q19. What type of leisure trip within Europe are you most likely to undertake next?

No. of respondents: 5,998

A SNAPSHOT OF GERMAN TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar 22	81% ▲20%*	8%	12%
Dec '21	61%	16%	24%
Sep '21	68%	15%	18%

TRAVEL READINESS

Trip fully booked	32% (18%* ▲)
Trip partially booked	19%
Destination chosen but trip not booked yet	33%
Destination not chosen	16%

POPULAR TRAVEL PERIODS

April-May '22	June-July '22	August-September '22
24%	38%	30%

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING EUROPEAN COUNTRY	32%
NON-NEIGHBOURING EUROPEAN COUNTRY	24%
WITHIN MY COUNTRY	29%
OUTSIDE EUROPE	10%

AND WITH WHOM?

with family	40%
with partner	35%
solo	11%

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
13%	30% (7%* ▲)	25%	16%	16%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
20%	30%	23%	12%	7%	5% (3%* ▼)	4%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach	25% (8%* ▲)
Coast & Sea	21%
Nature & Outdoors	18%

TOP 5 EUROPEAN DESTINATIONS**

Greece	10%
Italy	10%
Spain	8%
Turkey	7%
Austria	7%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

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

A SNAPSHOT OF BRITISH TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	82% ▲ 29%*	9%	10%
Dec '21	53%	19%	29%
Sep '21	57%	18%	25%

TRAVEL READINESS

- Destination not chosen: 22%
- Trip fully booked: 31% ▲ 17%*
- Trip partially booked: 13%
- Destination chosen but trip not booked yet: 34%

POPULAR TRAVEL PERIODS

April-May '22	June-July '22	August-September '22
23%	32%	30%

TRAVEL PLANNING

WHERE TO?

- ANOTHER EUROPEAN COUNTRY: 52%
- WITHIN MY COUNTRY: 31%
- OUTSIDE EUROPE: 13%

AND WITH WHOM?

- 42% with family
- 37% with partner
- 8% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
16%	31%	31% ▲ 9%*	11%	11%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
23%	33% ▲ 9%*	22%	10%	6%	2%	3% ▼ 8%*

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 34% ▲ 19%*
- City Break: 21%
- Coast & Sea: 13%

TOP 5 EUROPEAN DESTINATIONS**

Spain	21%
France	11%
Greece	8%
Italy	8%
Portugal	5%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

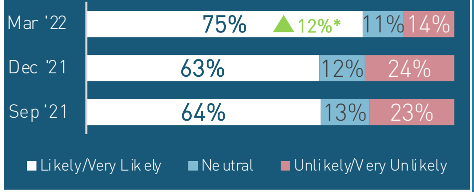
No. of respondents: 750 (total sample of respondents per country)

A SNAPSHOT OF FRENCH TRAVEL PLANS

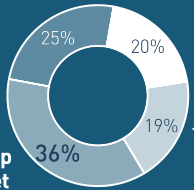
Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

17%	34%	35%
April-May '22	June-July '22	August-September '22

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING EUROPEAN COUNTRY	34%
NON-NEIGHBOURING EUROPEAN COUNTRY	12%
WITHIN MY COUNTRY	35%
OUTSIDE EUROPE	14%

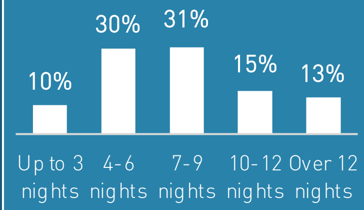
AND WITH WHOM?

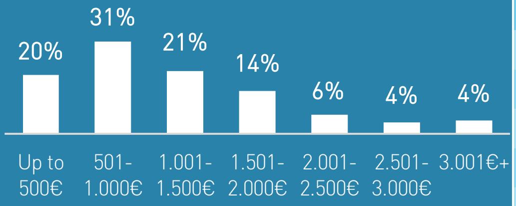
44% with family

36% with partner

8% solo

INTENDED LENGTH OF STAY AND BUDGET





PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach **23%**

Coast & Sea **17%**

Culture & Heritage **16%**

TOP 5 EUROPEAN DESTINATIONS**

Spain	16%
Italy	14%
Greece	9%
Portugal	8%
Croatia	6%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

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

A SNAPSHOT OF DUTCH TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	71% ▲19%*	15%	14%
Dec '21	52%	16%	32%
Sep '21	68%	18%	14%

TRAVEL READINESS

- Trip fully booked: 26%
- Trip partially booked: 22%
- Destination chosen but trip not booked yet: 29%
- Destination not chosen: 23%

POPULAR TRAVEL PERIODS

- April-May '22: 20%
- June-July '22: 35%
- August-September '22: 30%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING EUROPEAN COUNTRY: 16%
- NON-NEIGHBOURING EUROPEAN COUNTRY: 40%
- WITHIN MY COUNTRY: 22%
- OUTSIDE EUROPE: 17%

AND WITH WHOM?

- 35% with family
- 37% with partner
- 12% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	12% ▼8%*
4-6 nights	25%
7-9 nights	27%
10-12 nights	17%
Over 12 nights	19%

Up to 500€	16%
501-1.000€	21%
1.001-1.500€	24%
1.501-2.000€	14%
2.001-2.500€	9%
2.501-3.000€	7%
3.001€+	9% ▼5%*

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 23% ▲9%*
- Nature & Outdoors: 18%
- City Break: 17%

TOP 5 EUROPEAN DESTINATIONS**

Spain	11%
France	8%
Turkey	8%
Germany	7%
Greece	7%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

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

A SNAPSHOT OF ITALIAN TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	85% ▲ 18%*	8%	8%
Dec '21	67%	16%	17%
Sep '21	68%	20%	12%

TRAVEL READINESS

- Destination not chosen: 25%
- Trip fully booked: 19%
- Trip partially booked: 15%
- Destination chosen but trip not booked yet: 41%

POPULAR TRAVEL PERIODS

- April-May '22: 21%
- June-July '22: 35%
- August-September '22: 34%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING EUROPEAN COUNTRY: 24%
- NON-NEIGHBOURING EUROPEAN COUNTRY: 22%
- WITHIN MY COUNTRY: 44%
- OUTSIDE EUROPE: 7%

AND WITH WHOM?

- 38% with family
- 35% with partner
- 10% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
20%	38% ▼ 8%*	24%	10%	9%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
22%	32%	20%	13%	6%	4%	3%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Culture & Heritage: 27%
- Sun & Beach: 16%
- Coast & Sea: 12%

TOP 5 EUROPEAN DESTINATIONS**

Spain	15%
France	13%
UK	7%
Greece	7%
Germany	6%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

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

A SNAPSHOT OF BELGIAN TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	72% ▲16%*	13%	16%
Dec '21	56%	15%	29%
Sep '21	66%	15%	18%

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

TRAVEL READINESS

- Trip fully booked: 26%
- Trip partially booked: 26%
- Destination chosen but trip not booked yet: 29%
- Destination not chosen: 19%

POPULAR TRAVEL PERIODS

April-May '22	June-July '22	August-September '22
25%	34%	29%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING EUROPEAN COUNTRY: 36%
- NON-NEIGHBOURING EUROPEAN COUNTRY: 27%
- WITHIN MY COUNTRY: 18%
- OUTSIDE EUROPE: 15%

AND WITH WHOM?

- 41% with family
- 29% with partner
- 10% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
20%	24%	24%	15%	17%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
23%	26%	15%	14%	10%	6% (▼4%*)	6%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- Sun & Beach: 21%
- Coast & Sea: 17%
- Nature & Outdoors: 16%

TOP 5 EUROPEAN DESTINATIONS**

France	17%
Spain	12%
Italy	8%
Greece	6%
Portugal	6%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

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

A SNAPSHOT OF SWISS TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	54%	16%	30%
Dec '21	48%	14%	38%
Sep '21	61%	18%	21%

TRAVEL READINESS

Trip fully booked	20%
Trip partially booked	36%
Destination chosen but trip not booked yet	26%
Destination not chosen	18%

POPULAR TRAVEL PERIODS

April-May '22	June-July '22	August-September '22
28%	30%	24%

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING EUROPEAN COUNTRY	30%
NON-NEIGHBOURING EUROPEAN COUNTRY	26%
WITHIN MY COUNTRY	18%
OUTSIDE EUROPE	14%

AND WITH WHOM?

27% with family

18% with partner

12% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
20%	25%	21%	15%	19%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
13%	19%	17%	15%	11%	11%	14%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach 16% ▲ 6%*

Coast & Sea 11%

Nature & Outdoors 9%

TOP 5 EUROPEAN DESTINATIONS**

Italy	9%
Germany	7%
France	6%
Spain	5%
Greece	5%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

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

A SNAPSHOT OF SPANISH TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	84% ▲ 8%*	9%	7%
Dec '21	76%	11%	14%
Sep '21	72%	16%	12%

TRAVEL READINESS

- Destination not chosen: 23%
- Trip fully booked: 11%
- Trip partially booked: 13%
- Destination chosen but trip not booked yet: 53%

POPULAR TRAVEL PERIODS

- April-May '22: 16%
- June-July '22: 37%
- August-September '22: 34%

TRAVEL PLANNING

WHERE TO?

- NEIGHBOURING EUROPEAN COUNTRY: 34%
- NON-NEIGHBOURING EUROPEAN COUNTRY: 13%
- WITHIN MY COUNTRY: 43%
- OUTSIDE EUROPE: 7%

AND WITH WHOM?

- 40% with family
- 44% with partner
- 6% solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
13%	52% ▲ 7%*	25%	6%	5%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
19%	28%	22%	15%	7%	5%	3%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break: 34%
- Culture & Heritage: 14%
- Nature & Outdoors: 13%

TOP 5 EUROPEAN DESTINATIONS**

France	18%
Italy	12%
Portugal	11%
Germany	6%
UK	6%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

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

A SNAPSHOT OF POLISH TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	82%	5%	12%
Dec '21	80%	7%	13%
Sep '21	73%	9%	18%

TRAVEL READINESS

- Destination not chosen: 25%
- Trip fully booked: 15%
- Trip partially booked: 19%
- **Destination chosen but trip not booked yet**: 41%

POPULAR TRAVEL PERIODS

- **12%** April-May '22
- **43%** June-July '22
- **29%** August-September '22

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING EUROPEAN COUNTRY	25%
NON-NEIGHBOURING EUROPEAN COUNTRY	27%
WITHIN MY COUNTRY	34%
OUTSIDE EUROPE	10%

AND WITH WHOM?

- **47%** with family
- **34%** with partner
- **7%** solo

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
12%	39%	30%	12%	7%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
18%	33%	20%	11%	9%	4%	6%

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

- City Break **19%**
- Coast & Sea **16%**
- Culture & Heritage **13%**

TOP 5 EUROPEAN DESTINATIONS**

Croatia	12%
Italy	9%
Greece	7%
Germany	7%
UK	6%

* Significant increase or decrease vs previous survey period

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

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

A SNAPSHOT OF AUSTRIAN TRAVEL PLANS

Travel horizon: April-September 2022

TRAVEL SENTIMENT

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely
Mar '22	76% ▲19%*	12%	13%
Dec '21	57%	15%	28%
Sep '21	67%	15%	18%

TRAVEL READINESS

Destination not chosen	22%
Trip fully booked	26% (▲8%*)
Trip partially booked	22%
Destination chosen but trip not booked yet	30%

POPULAR TRAVEL PERIODS

April-May '22	June-July '22	August-September '22
28%	32%	27%

TRAVEL PLANNING

WHERE TO?

NEIGHBOURING EUROPEAN COUNTRY	30%
NON-NEIGHBOURING EUROPEAN COUNTRY	28%
WITHIN MY COUNTRY	24%
OUTSIDE EUROPE	13%

AND WITH WHOM?

with family	32%
with partner	33%
solo	11%

INTENDED LENGTH OF STAY AND BUDGET

Up to 3 nights	4-6 nights	7-9 nights	10-12 nights	Over 12 nights
24%	34%	21%	10%	11%

Up to 500€	501-1.000€	1.001-1.500€	1.501-2.000€	2.001-2.500€	2.501-3.000€	3.001€+
22%	28%	19% (▲6%*)	13%	8%	6%	5% (▼4%*)

PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS

Sun & Beach	15% (▲10%*)
Coast & Sea	15%
City Break	14%

TOP 5 EUROPEAN DESTINATIONS**

Italy	15%
Croatia	12%
Germany	7%
Spain	7%
Greece	5%

* Significant increase ▲ or decrease ▼ vs previous survey period

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

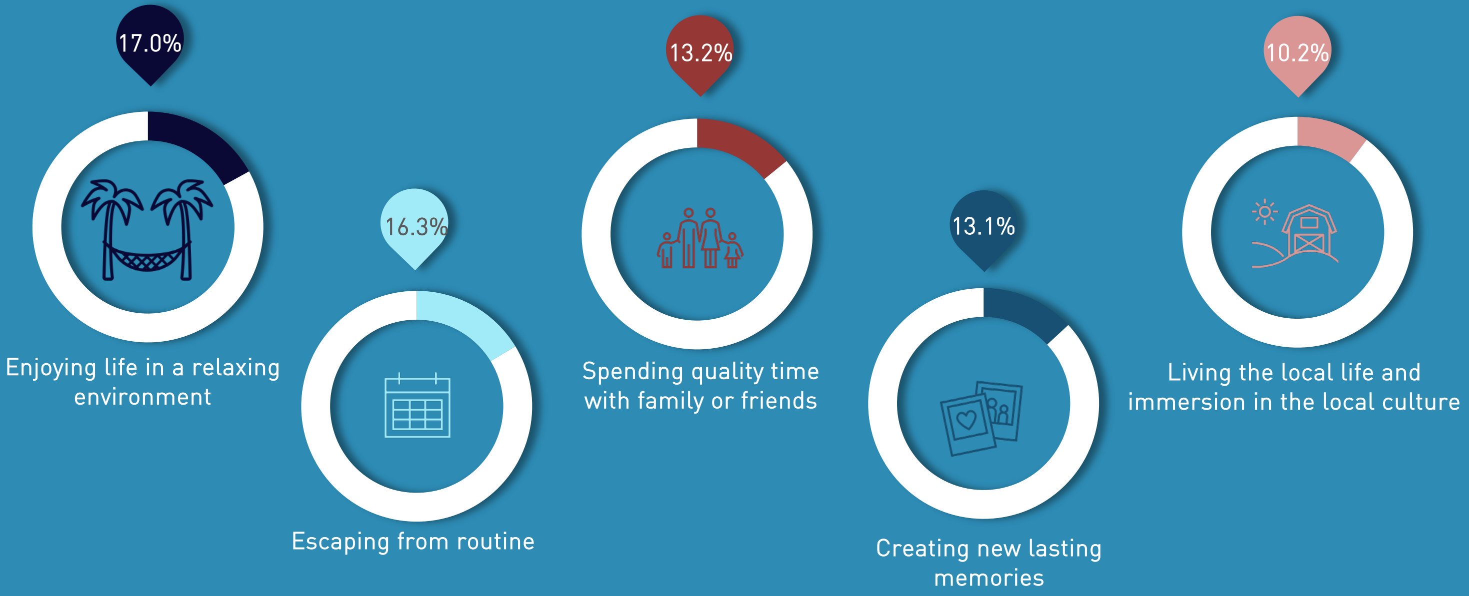
No. of respondents: 501 (total sample of respondents per country)

TRIP PLANNING

02

WHAT DO EUROPEANS MISS THE MOST ABOUT TRAVELLING?

Gen Z travellers (18-24 years old) mostly miss the chance to create new lasting memories; the 25-44 age group long to escape from routine; and Europeans over 45 years of age miss enjoying life in a relaxing environment the most



March '22 survey

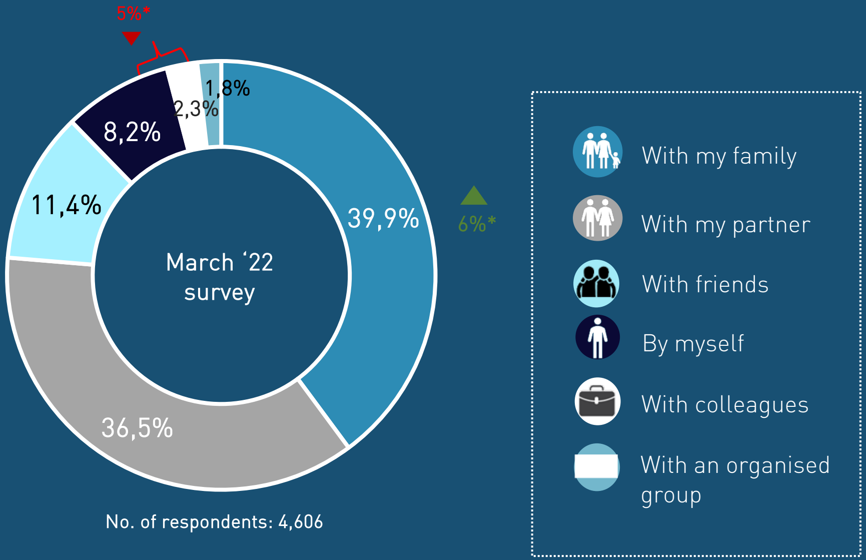
* No significant changes between waves were recorded for this question

Q10. What is it that you miss the most about travelling and cannot wait to experience it again?

No. of respondents: 5,998

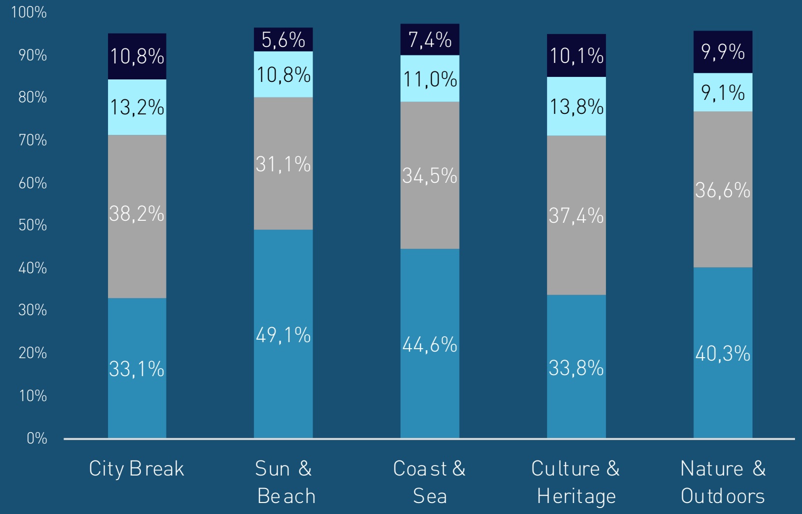
As summer approaches, family travel is once again Europeans' leading choice (40%). Plans for solo travel and business trips drop

Preferred travel companion for respondents who are most likely to travel in the next 6 months



No. of respondents: 4,606

Preferred travel companion (Top 4) vs preferred type of holiday



March '22 survey

No. of respondents: 5,998

Q18. With whom are you most likely to travel during your next trip within Europe?

* Statistically significant difference vs previous survey period

The share of Europeans planning to travel by plane rises by 7%, while preferences for train and bus travel drop by 4% to the lowest level since August 2020. This trend may potentially lead to higher tourism transportation CO^2 emissions during the peak travel season, compared to the last two years

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

UK
71.8% ▲ 26%*

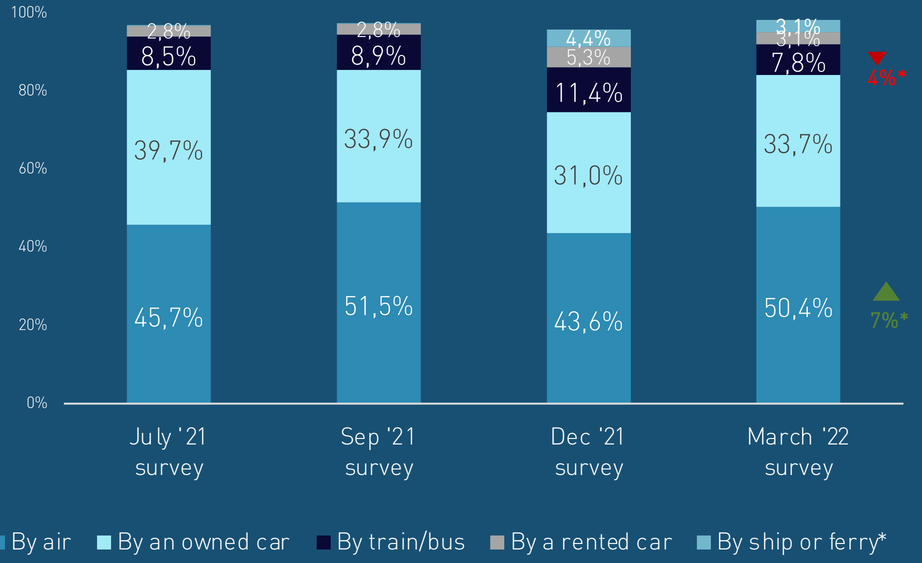
Italy
55.3%

Spain
67.7% ▲ 8%*

Poland
52.5%

France
55.3%

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



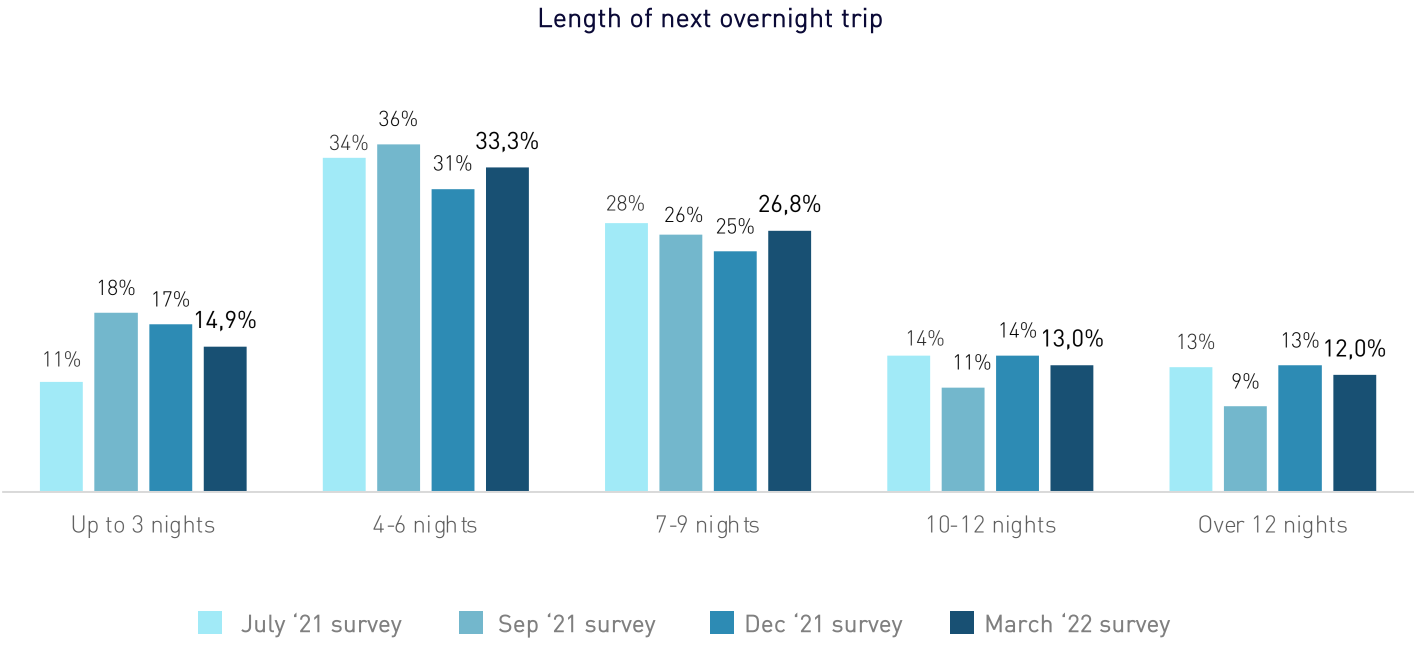
*Up to September '21. 'By ship or ferry' were included in 'Other'

* Statistically significant difference vs previous survey period

No. of respondents: 4,606

Q16. Which of the following modes of transport would you most consider using during your next trip within Europe?

The majority of Europeans with travel plans intend to take 4–6-night (33%) or 7-9-night (27%) vacations. 25% will opt for trips of 10 nights or longer



Micro-trips (up to 3 nights) are the most common for couples, while 10+ night-trips are the most common among families

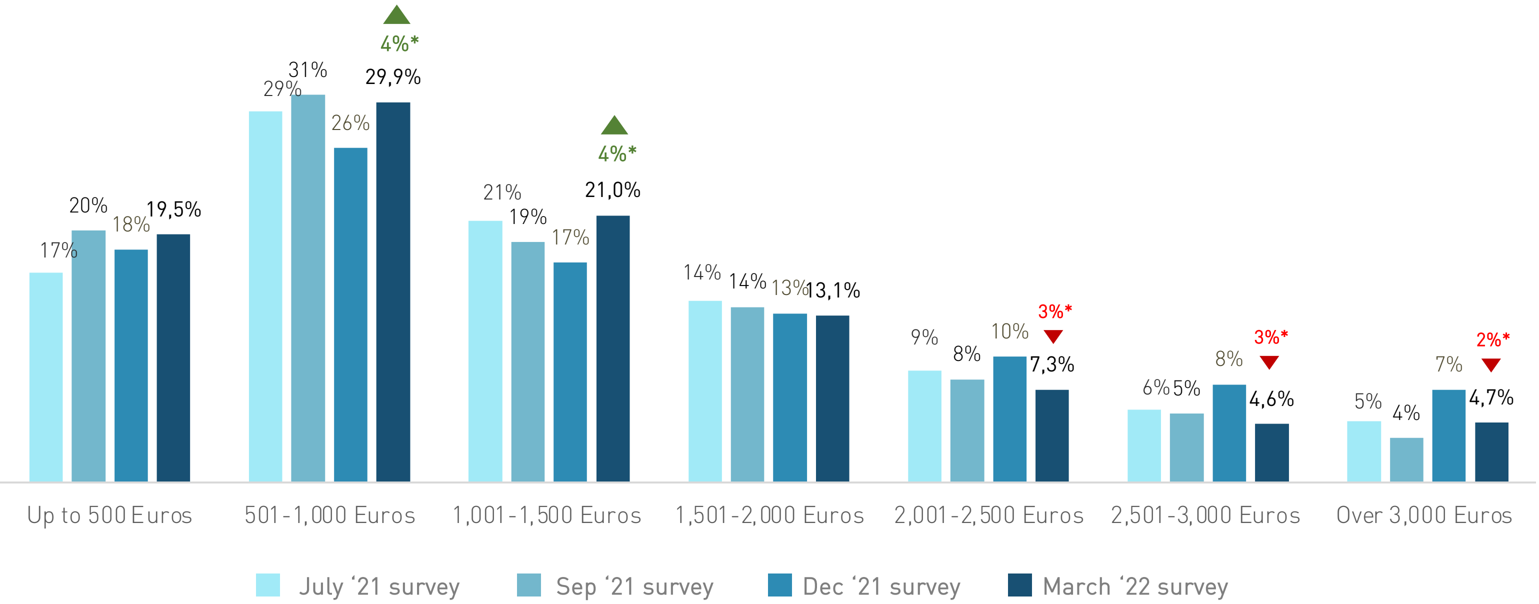
Q20. What would be the length of your next overnight trip?

* No significant changes between waves were recorded for this question

No. of respondents: 4,606

The share of Europeans planning to spend 500-1,500 euros rises by 8%, while the share of those budgeting over 2,000 euros drops by 8%, potentially due to rising concerns over inflation

Investing in the next overnight trip



Spending habits remain stable across all age groups, and there are no significant differences in the willingness to spend between younger and more mature travellers

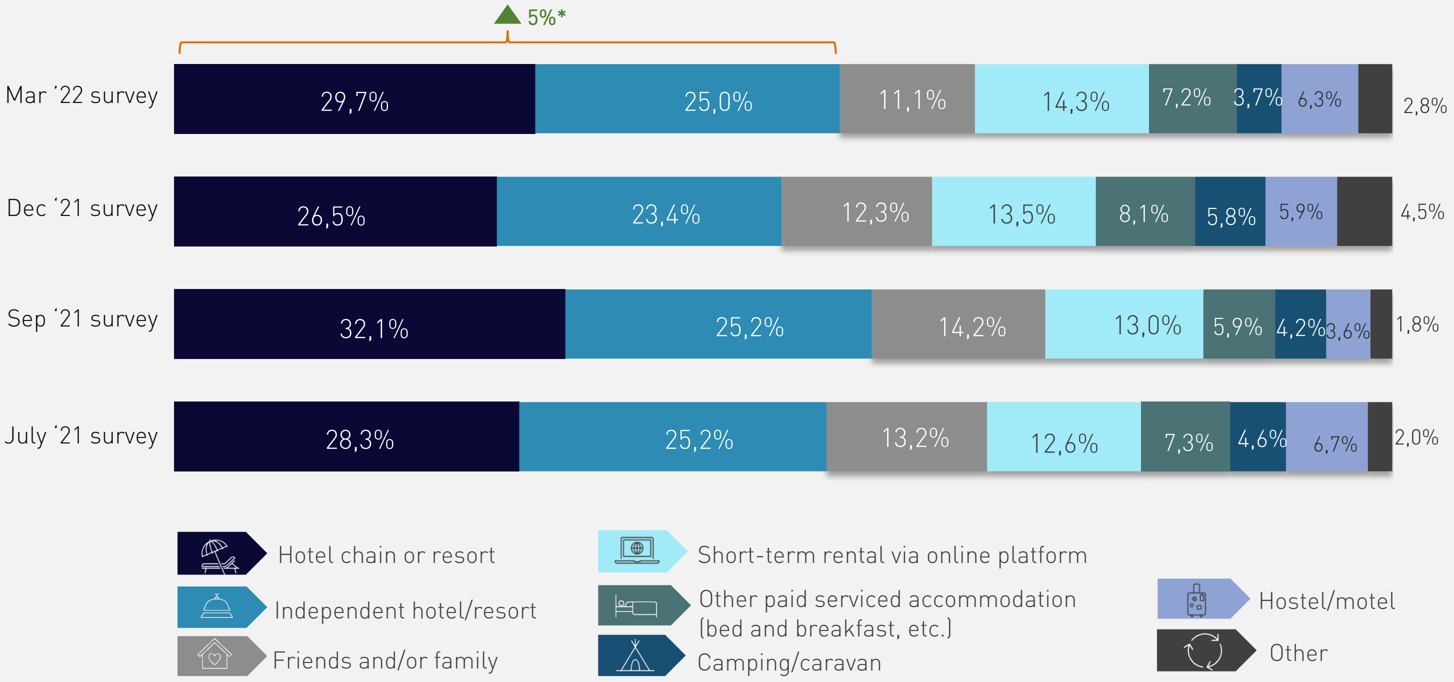
Q21. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

* Statistically significant difference vs previous survey period

No. of respondents: 4,606

With beach holidays in mind, the preference for hotels over other types of accommodation goes up by 5%

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



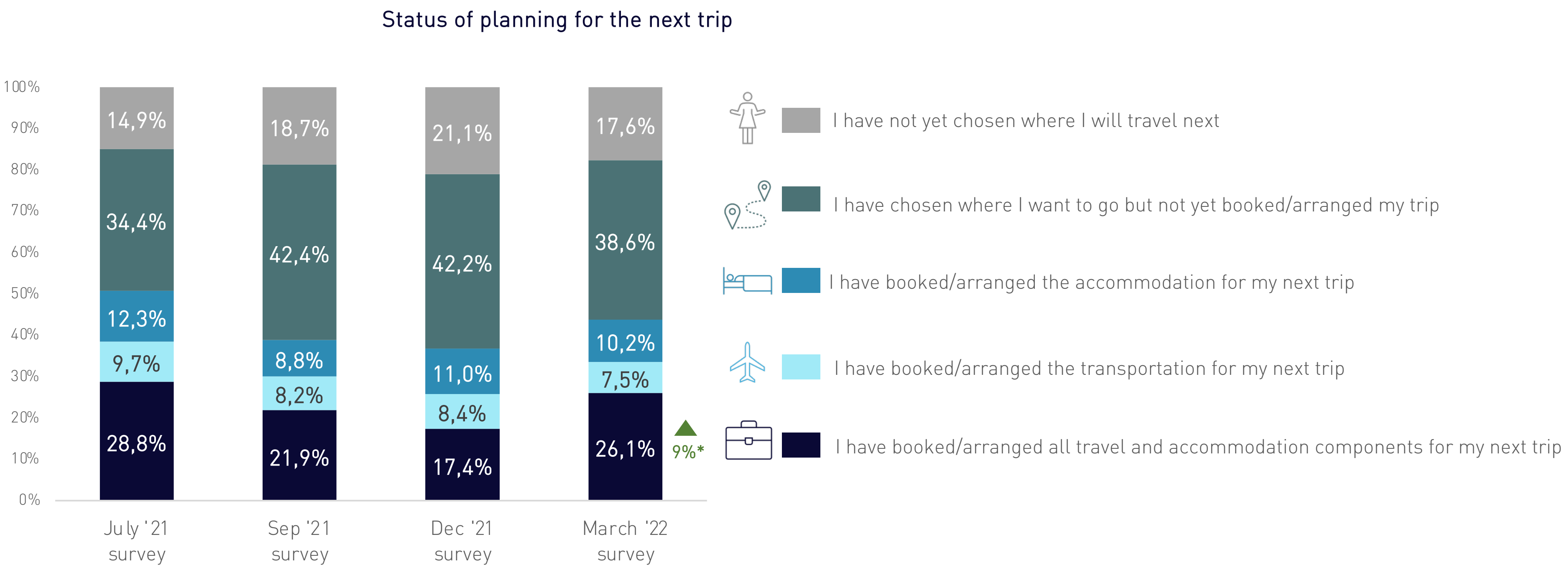
The preference for staying in hotels (chain / independent) grows with age: from 46% among Europeans aged 18-24 to 55% for travellers in the 54+ age group

* Statistically significant difference vs previous survey period

Q17. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

No. of respondents: 4,606

Despite the surge in travel sentiment, only 1 in 4 Europeans have fully booked their next trip, indicating a limited level of consumer commitment and some potential impact of the war in Ukraine

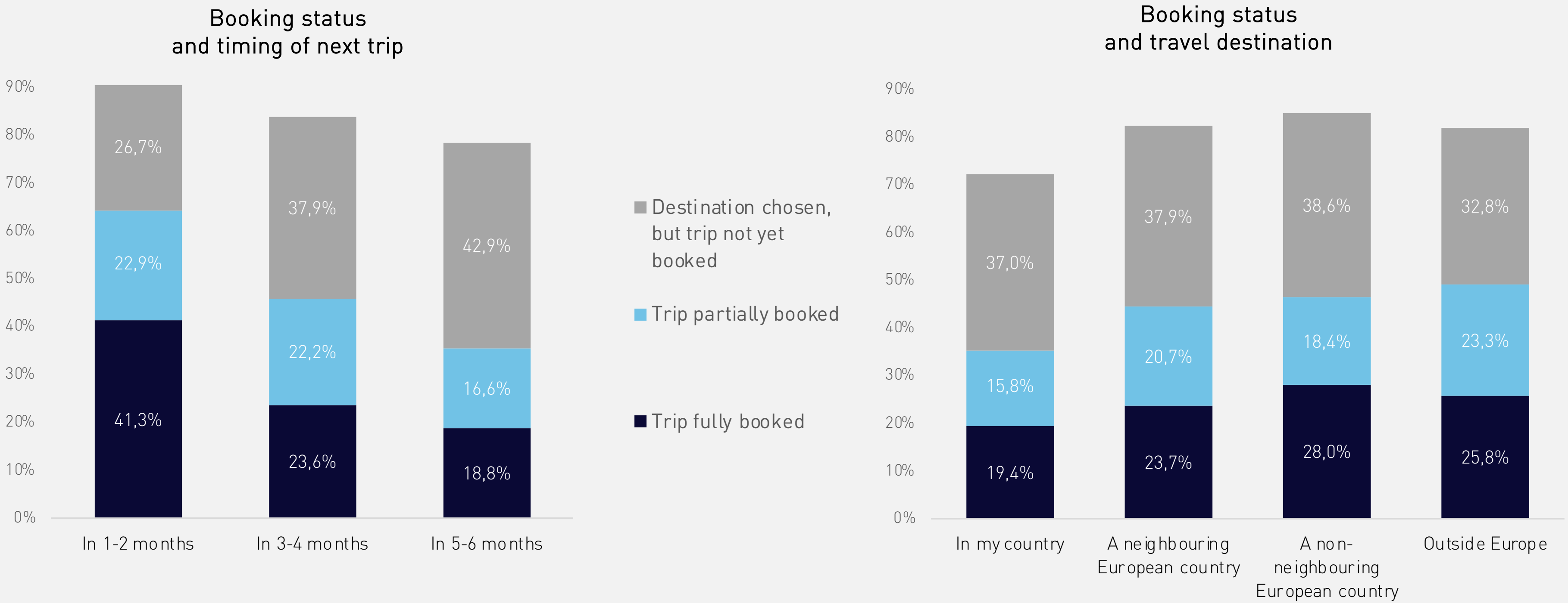


Q22. Please select a response which best describes the planning for your next trip:

* Statistically significant difference vs previous survey period

No. of respondents: 4,606

Europeans have made full or partial bookings, mainly for trips in April or May; their commitment is slightly stronger for international travel than for domestic trips



March '22 survey

Q22. Please select a response which best describes the planning for your next trip:

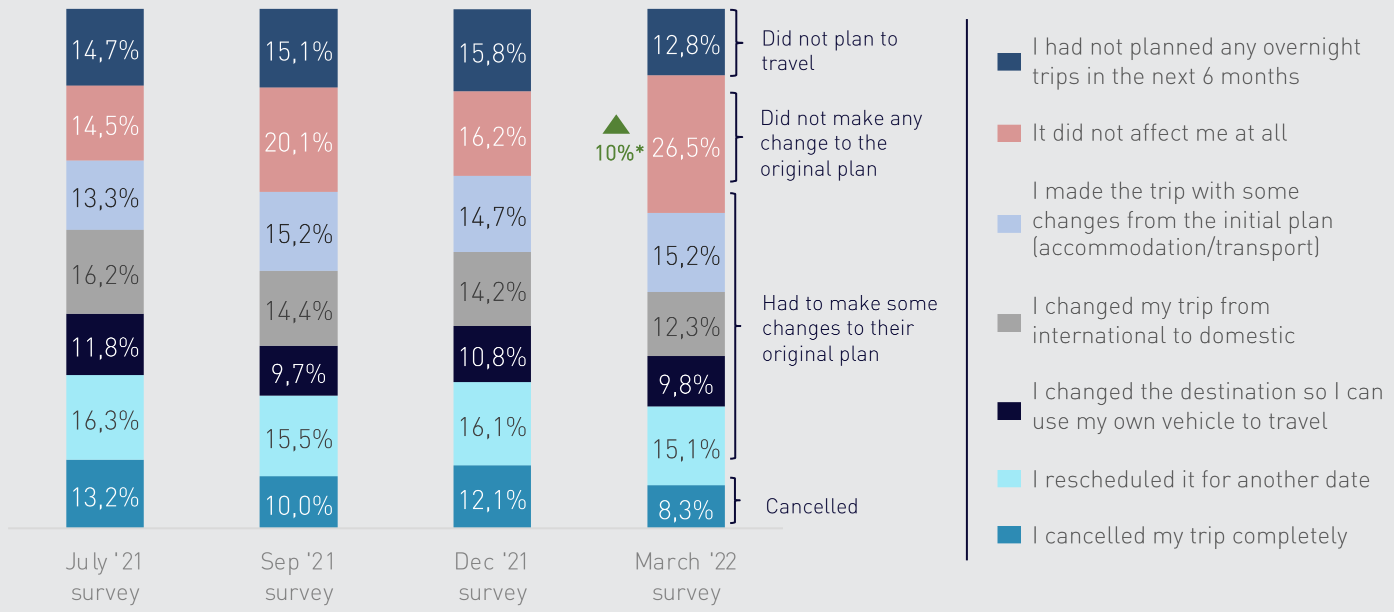
No. of respondents: 5,998

TRAVEL CONCERNS

03

As Europeans learn to live with COVID-19 and travel restrictions are eased, the number of those who realise their original travel plans continues to increase steadily

How has COVID-19 affected travel plans?



Top 5 markets choosing domestic over international travel

Italy 18.9%

Spain 14.8% (5%*)

Germany 14.2%

Poland 13.9%

Switzerland 11.9%

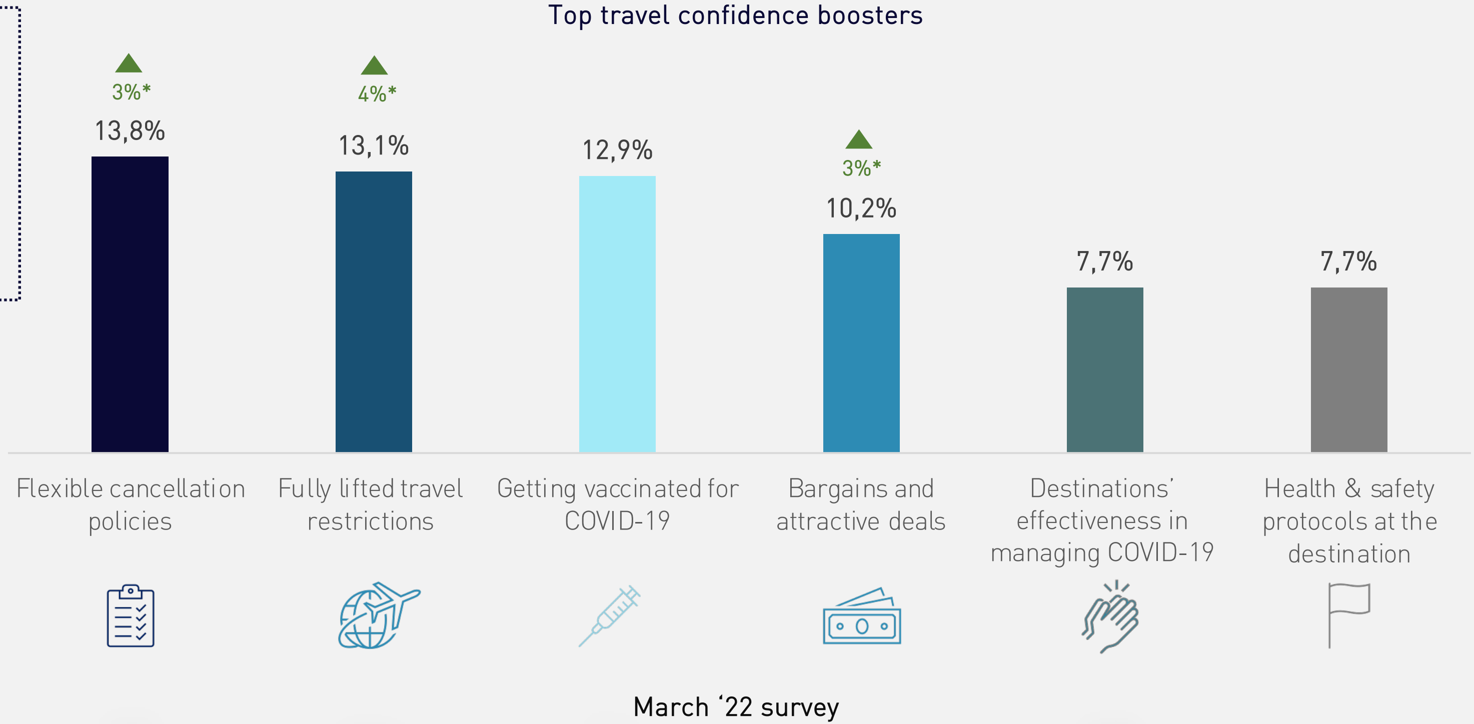
Q2. If you were planning to take an overnight trip in the next 6 months within Europe, how has COVID-19 affected your plans?

* Statistically significant difference vs previous survey period

No. of respondents: 5,998

As Europeans are already vaccinated to a great extent, COVID-19 vaccination is no longer the top travel confidence booster; flexible cancellation policies and lifted travel restrictions have taken the lead, while the importance of bargains and attractive deals also increased, potentially leading to more last-minute bookings

Flexible cancellation policies are important to 35% of Europeans planning to travel in June-July, compared to only 23% among those who will travel in April-May



* Statistically significant difference vs previous survey period

Q3. Which factors will make you feel more confident to start planning a trip in the next months within Europe?

No. of respondents: 5,998

‘TRAVEL-READY’ EUROPEANS’ CONCERNS

Quarantine measures remain Europeans’ most critical concern, while Covid-19 case numbers in the destination drops from second to fifth place; the economic situation is still of relatively low concern

Leading concerns for those who are most likely to travel next

March ‘22 survey

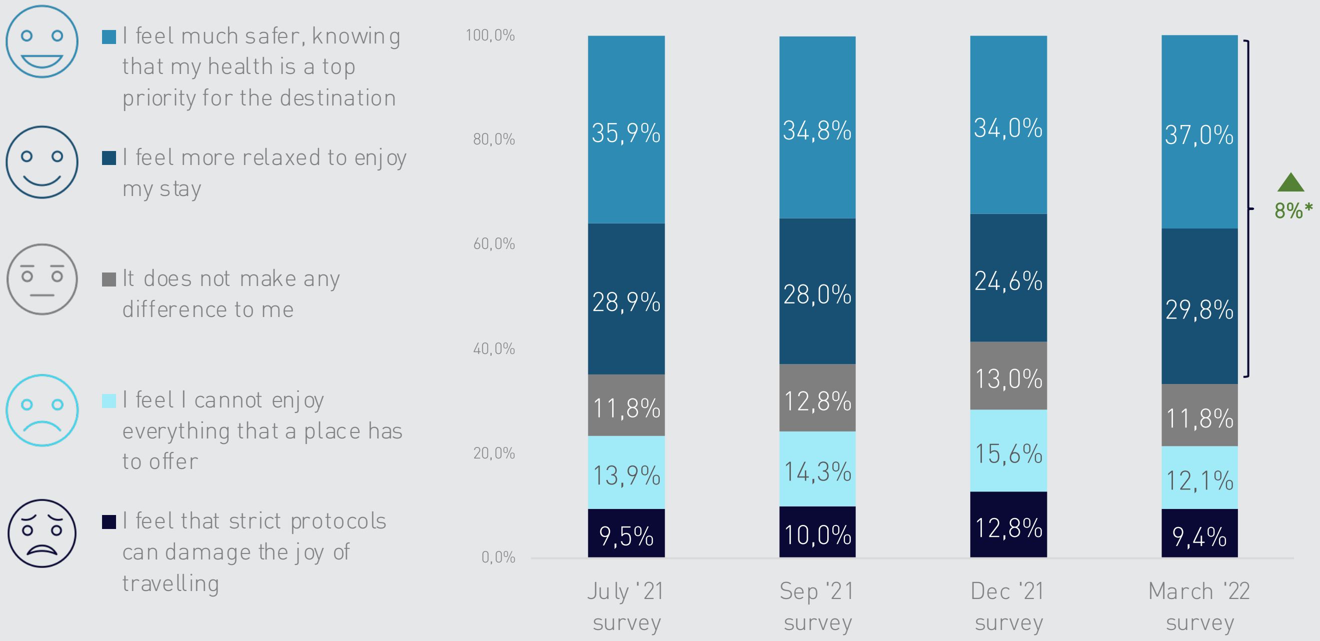
Q4. What currently concerns you the most about travelling within Europe?
The answers to this question did not include an option referring to the Russia-Ukraine war. Future research waves will examine this aspect.

* No significant changes between waves were recorded for this question

No. of respondents: 4,606

Despite the drop in COVID-19 cases during data collection, travel-ready Europeans feel both safer and more relaxed with strict health & safety protocols

Sentiment towards strict health & safety protocols



Travellers favouring Wellness & Relaxation and Culture & Heritage trips put the greatest importance on strict health & safety protocols

**This refers to the total sample

Q6. Please select a response which describes you the most:
"When I travel to places with strict health and safety protocols…"

* No significant changes between waves were recorded for this question

No. of respondents: 4,606

METHODOLOGICAL ANNEX

04

METHODOLOGICAL ANNEX
THE SURVEY

- The report is the result of online market research of Europeans who took at least 2 overnight trips during the last three years (2019-2021)
- Distribution/data collection period:
  - **Wave 8:** 13-23 July 2021; sample = 5,778 / **Wave 9:** 10-18 September 2021; sample = 5,769 / **Wave 10**: 23-31 December 2021; sample = 6,002 / **Wave 11**: 01-09 March 2022; sample = 5,998
  - **Countries**: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - **Languages**: English, French, German, Italian, Spanish, Polish and Dutch
- Research themes examined: Travel personas (1 question), Travel concerns and COVID-19 impact on travel (9 questions) and Travel intentions, preferences and trip planning (12 questions)
- 45% of the Wave 11 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	73	45	103	96	92	56	85	135	88	861
	25 - 34	135	112	74	140	129	155	106	134	161	161	1,307
	35 - 44	126	135	101	130	141	151	120	137	137	126	1,304
	45 - 54	138	168	105	74	146	168	93	87	48	59	1,086
	⩾55	254	263	175	54	238	188	126	57	19	66	1,440
Total		**741**	**751**	**500**	**501**	**750**	**754**	**501**	**500**	**500**	**500**	**5,998**

Study on Monitoring Sentiment for Intra-European Travel

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

Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to completely eliminate every margin of error.

Published by the European Travel Commission

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Website: www.etc-corporate.org
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ISBN No: 978-92-95107-60-1
Cover photo : @febiyanrt
Design: MINDHAUS

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION