



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 remains low at 6%.

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.



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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.

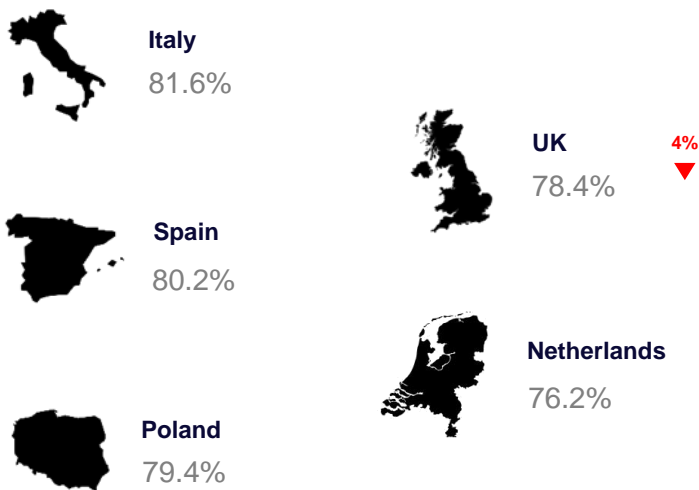
TRAVEL PLANS

01

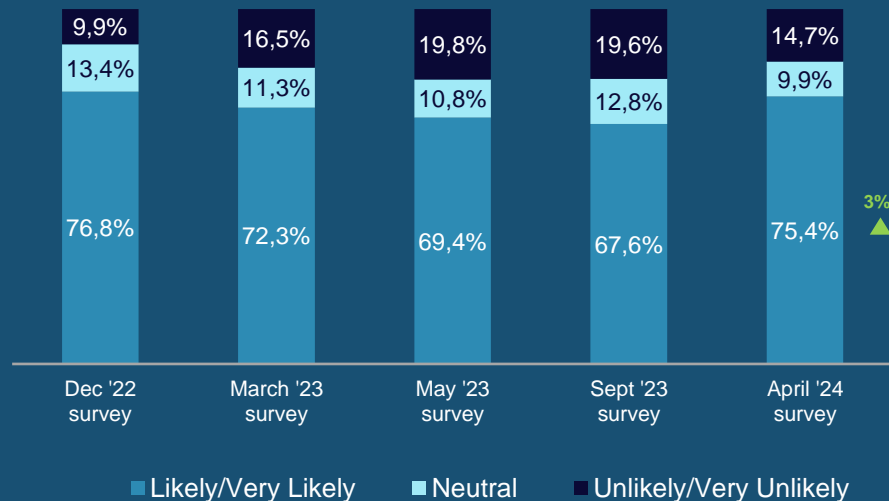


European travel intentions surge: a 3% increase in planned trips between May and October 2024

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



Intention to travel in the next six months



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

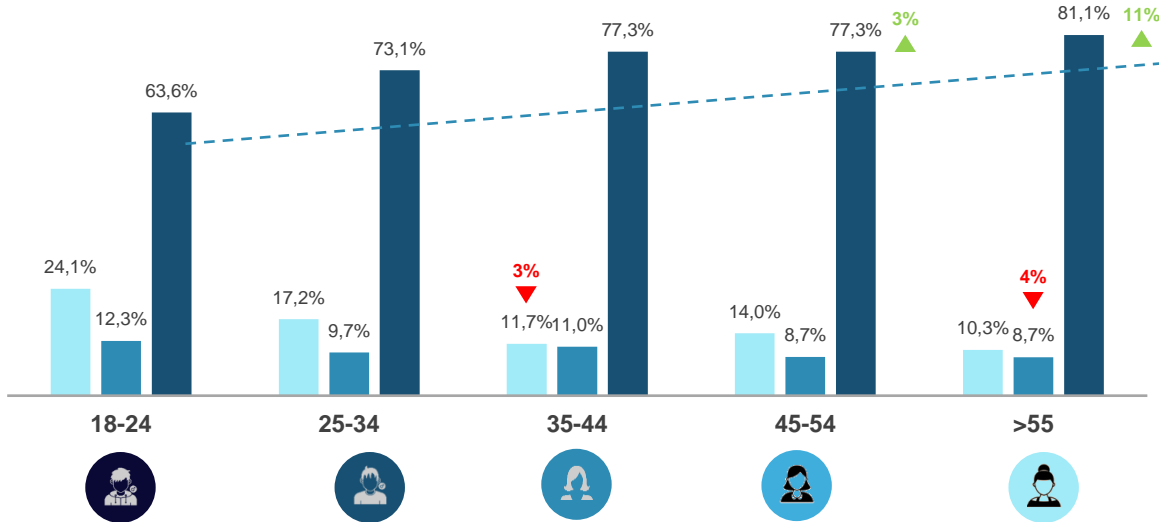
* Statistically significant difference vs a year ago (March 2023)

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%)

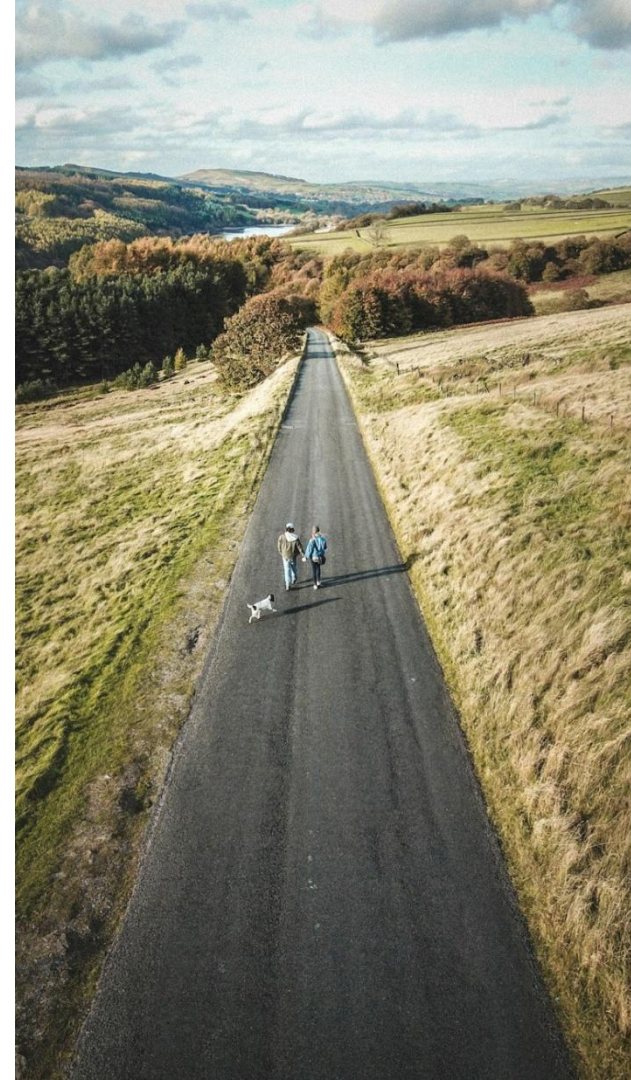
Intention to travel in the next six months by age group

Very unlikely/unlikely Neutral Likely/very likely



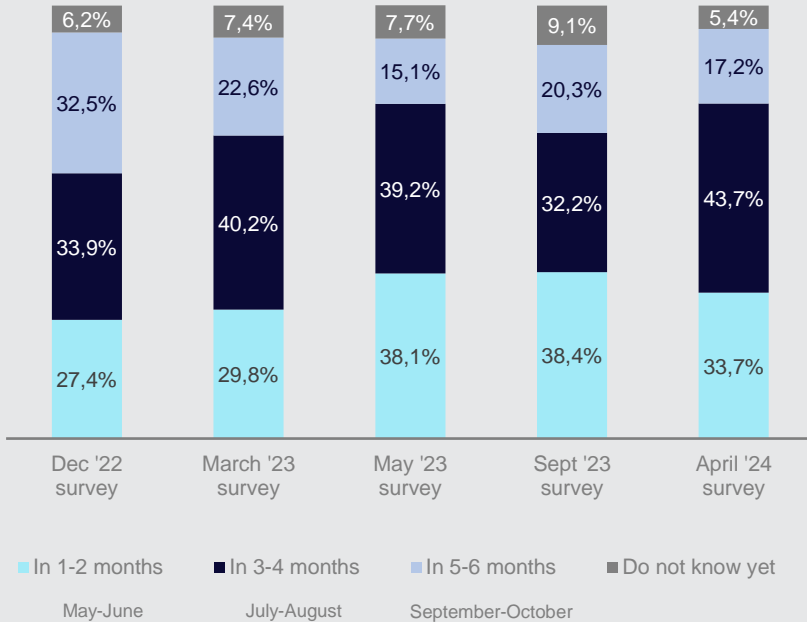
* Statistically significant difference vs a year ago (March 2023)

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?



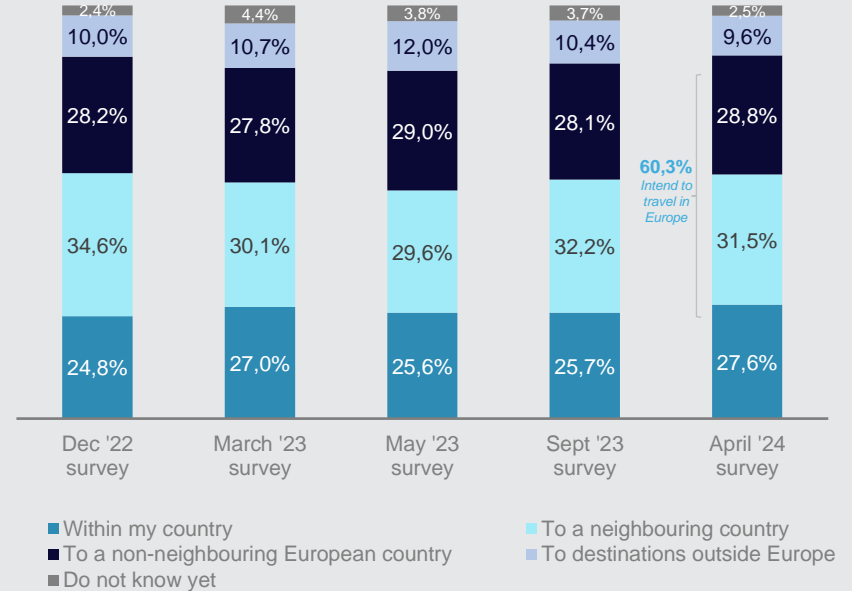
60% of Europeans are planning to travel within Europe. July and August are the preferred travel months for a large share (44%) of them

When will Europeans travel next?



Q11. 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?



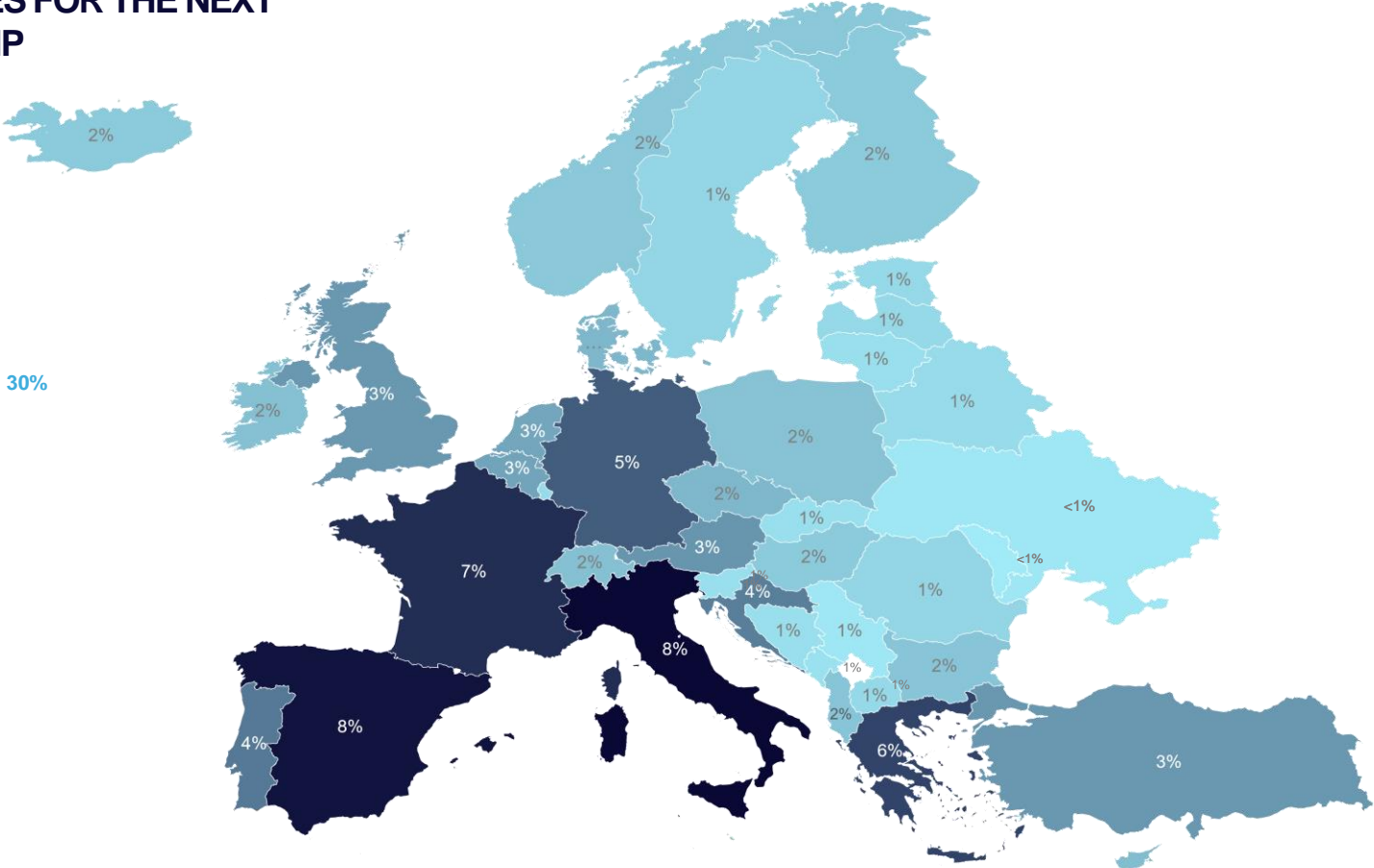
Q12. Where do you plan to travel in the next 6 months?

PREFERRED COUNTRIES FOR THE NEXT INTRA – EUROPEAN TRIP

April '24 survey

TOP 10 COUNTRIES

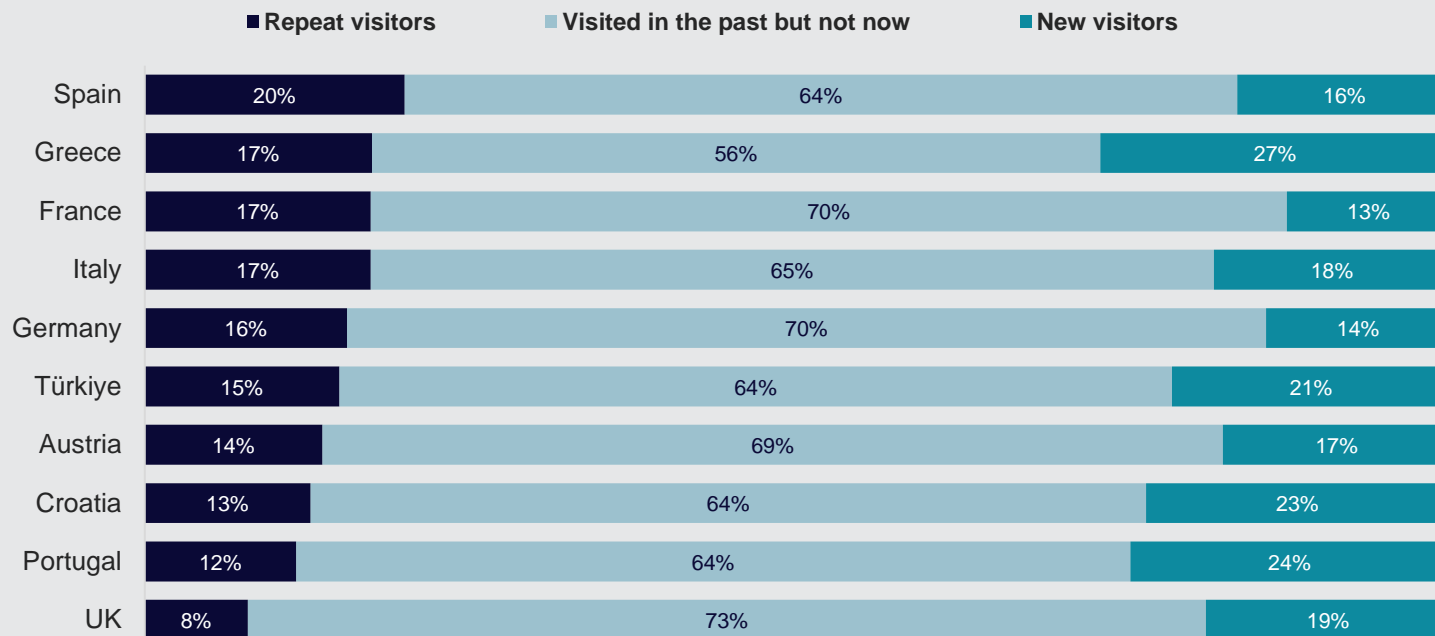
Italy	8,4%	}	30%
Spain	8,1%		
France	7,1%		
Greece	6,3%		
Germany	5,4%		
Portugal	4,4%		
Croatia	4,2%		
Austria	3,4%		
United Kingdom	3,3%		
Türkiye	3,0%		



* Please use this map as a reference only
 No. of respondents: 4,583

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)

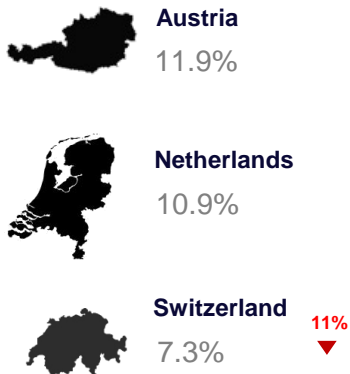
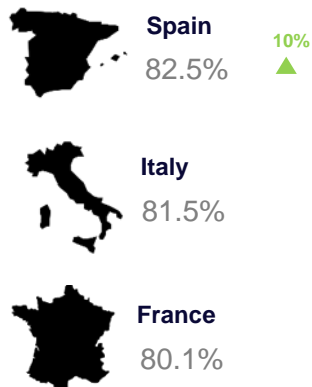


Total No. of cases: 7,188

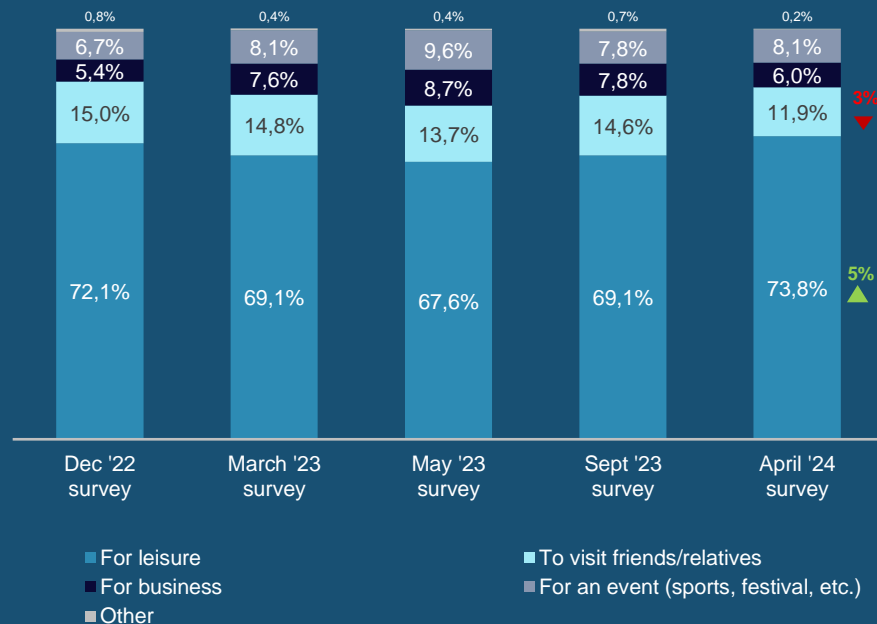
Q1. Which European countries have you visited in the past three years (2022-2023-24)?
Q13. To which country(ies) do you plan to travel next?

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



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







16 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)

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 500-1000 €	49% 4-6 nights 500-1000 €	45% 4-6 nights 500-1000 €	37% 4-6 nights 500-1000 €
	25% 4-6 nights 1001-1500 €	30% Up to 3 nights Up to 500 €	24% 7-9 nights 1001-1500 €	22% 7-9 nights 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

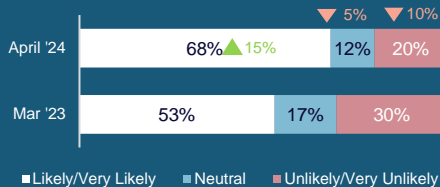
SNAPSHOT: AUSTRIAN TRAVEL PLANS

Travel horizon: May 2024-October 2024

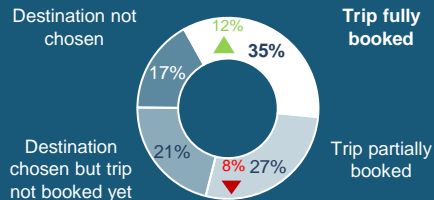


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

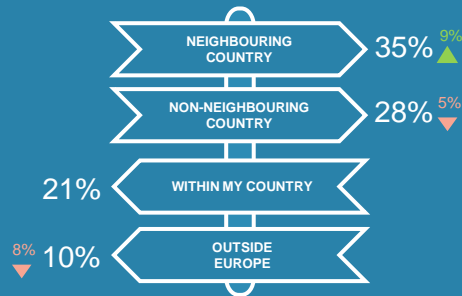


POPULAR TRAVEL PERIODS

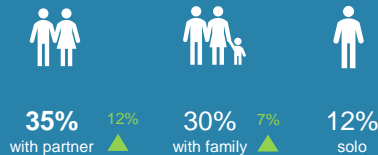


TRAVEL PLANNING

WHERE TO?

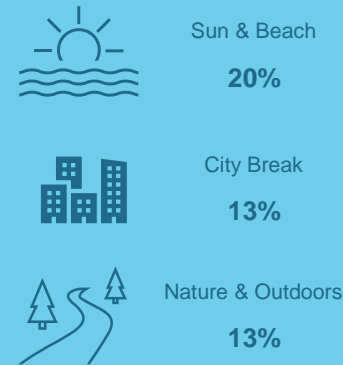


TRAVELLING WITH?

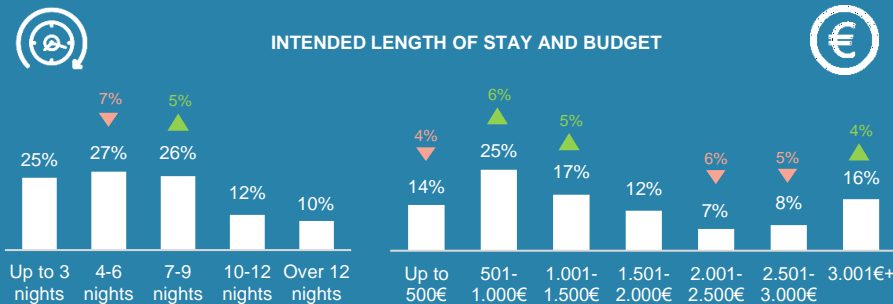


PREFERRED TYPES OF TRIPS & DESTINATIONS

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**

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

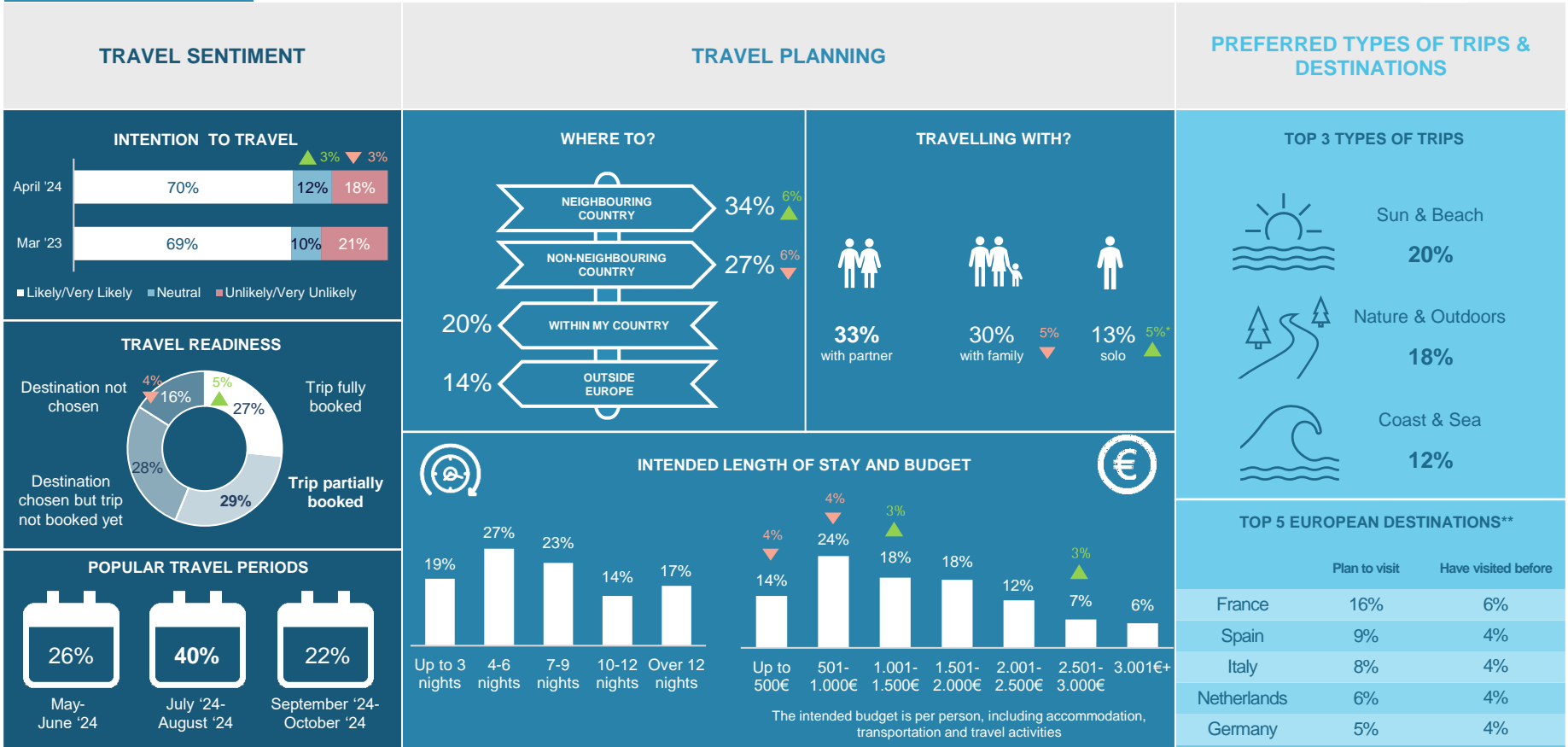
¹⁸ * Significant increase ▲ or decrease ▼ vs the same time last year

** 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



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

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

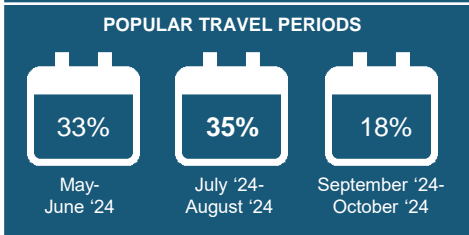
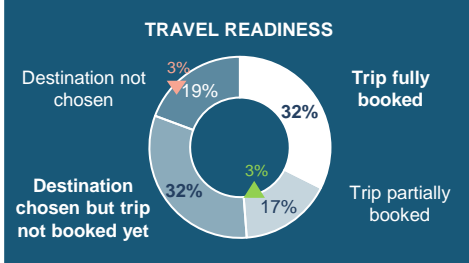
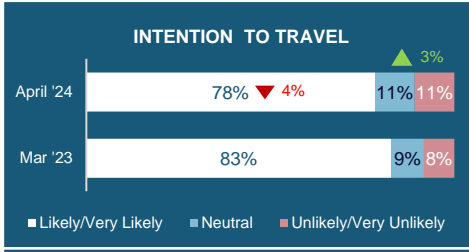
No. of respondents: 500 (total sample of respondents per country)

SNAPSHOT: BRITISH TRAVEL PLANS

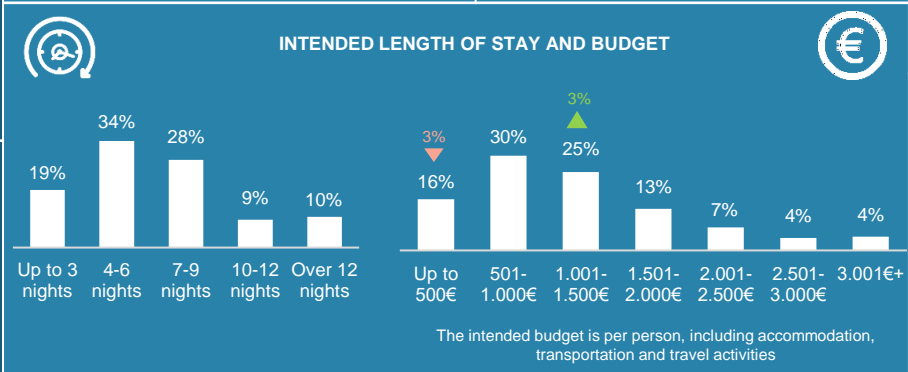
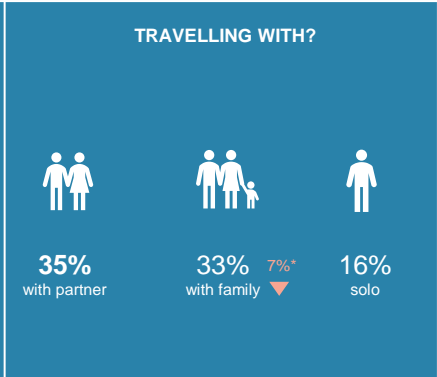
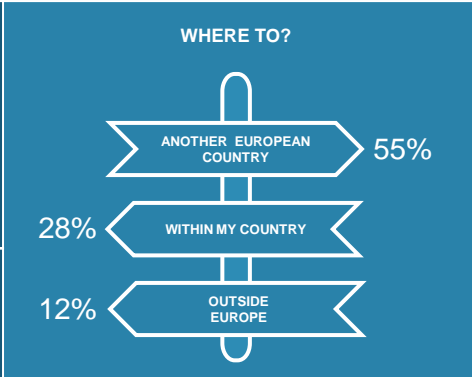
Travel horizon: May 2024-October 2024



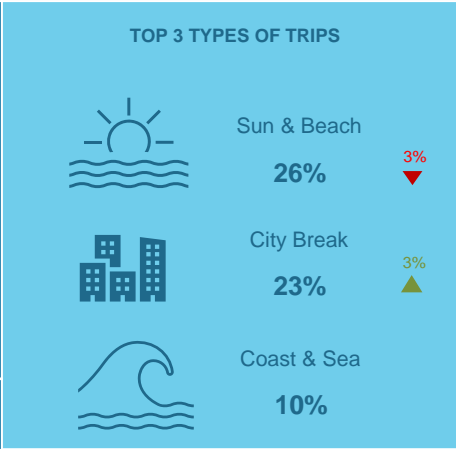
TRAVEL SENTIMENT



TRAVEL PLANNING



PREFERRED TYPES OF TRIPS & DESTINATIONS



TOP 5 EUROPEAN DESTINATIONS**

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

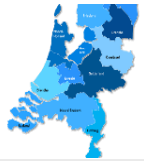
* Significant increase ▲ or decrease ▼ vs the same time last year

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

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

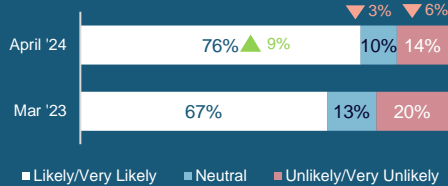
SNAPSHOT: DUTCH TRAVEL PLANS

Travel horizon: May 2024-October 2024

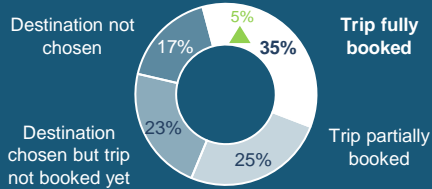


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

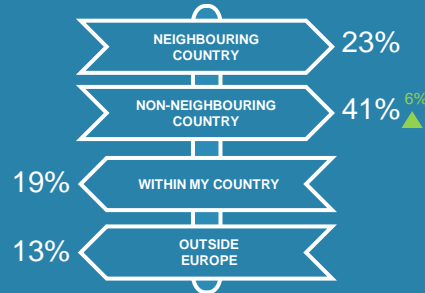


POPULAR TRAVEL PERIODS

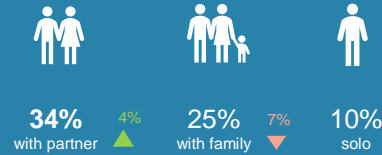


TRAVEL PLANNING

WHERE TO?

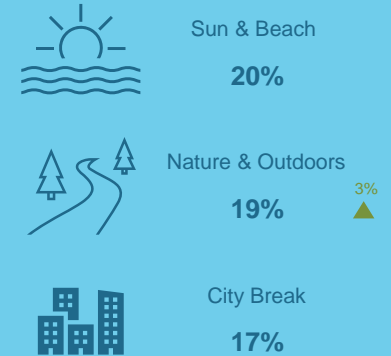


TRAVELLING WITH?



PREFERRED TYPES OF TRIPS & DESTINATIONS

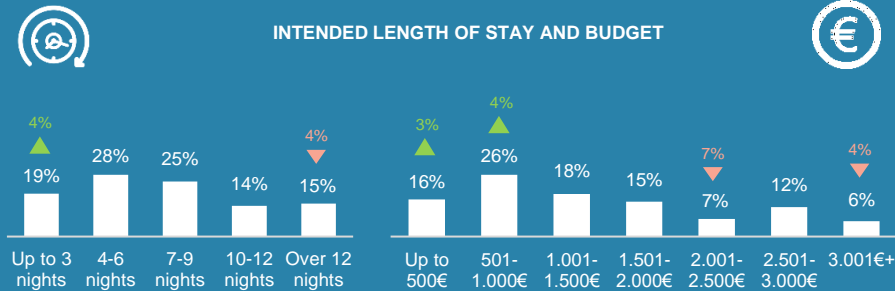
TOP 3 TYPES OF TRIPS



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%

INTENDED LENGTH OF STAY AND BUDGET



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

* 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)

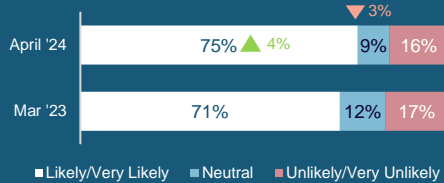
SNAPSHOT: FRENCH TRAVEL PLANS

Travel horizon: May 2024-October 2024

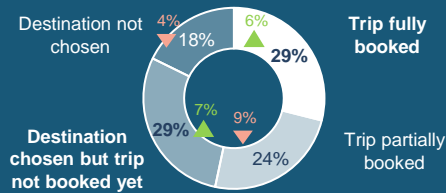


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

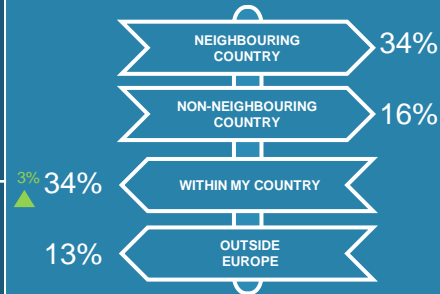


POPULAR TRAVEL PERIODS

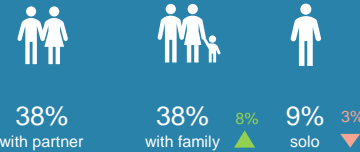


TRAVEL PLANNING

WHERE TO?

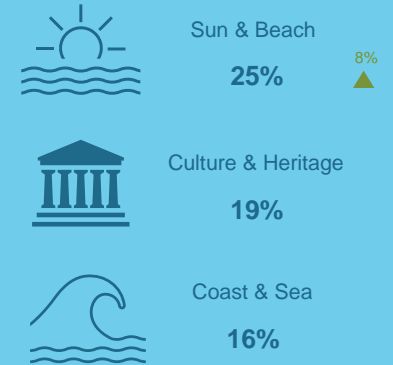


TRAVELLING WITH?



PREFERRED TYPES OF TRIPS & DESTINATIONS

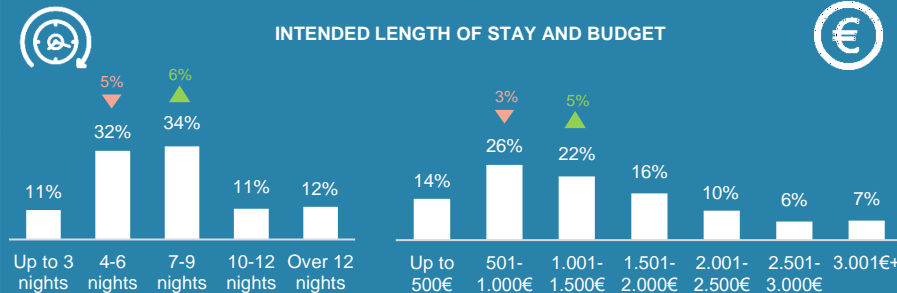
TOP 3 TYPES OF TRIPS



TOP 5 EUROPEAN DESTINATIONS**

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

INTENDED LENGTH OF STAY AND BUDGET



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

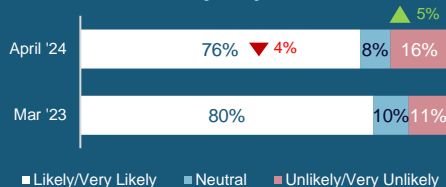
SNAPSHOT: GERMAN TRAVEL PLANS

Travel horizon: May 2024-October 2024

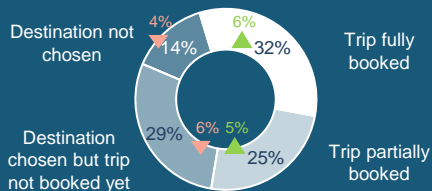


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

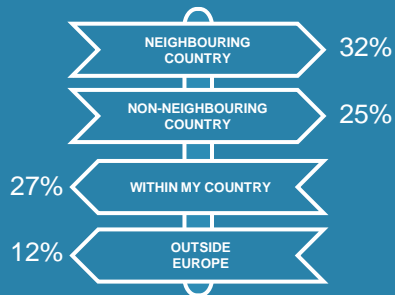


POPULAR TRAVEL PERIODS

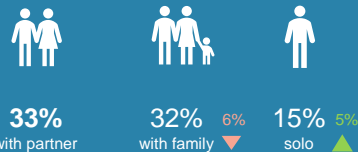


TRAVEL PLANNING

WHERE TO?

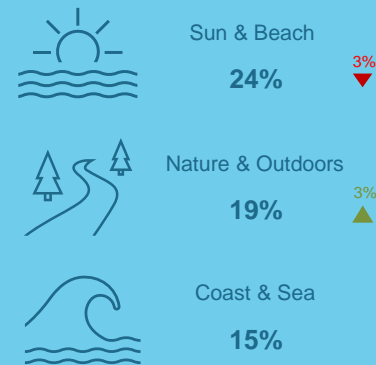


TRAVELLING WITH?



PREFERRED TYPES OF TRIPS & DESTINATIONS

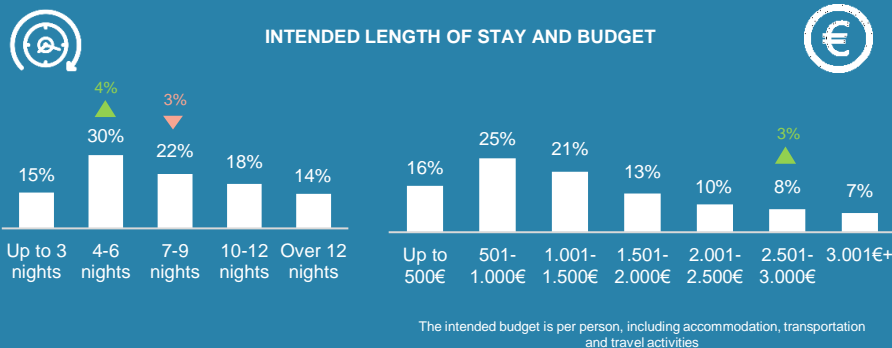
TOP 3 TYPES OF TRIPS



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%

INTENDED LENGTH OF STAY AND BUDGET



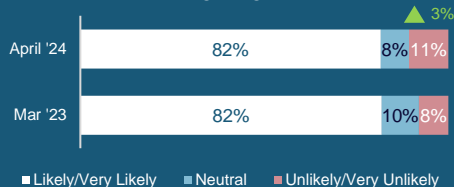
SNAPSHOT: ITALIAN TRAVEL PLANS

Travel horizon: May 2024-October 2024

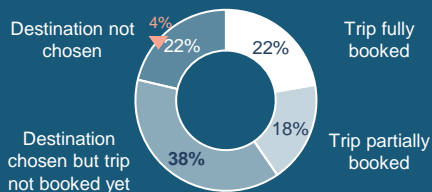


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

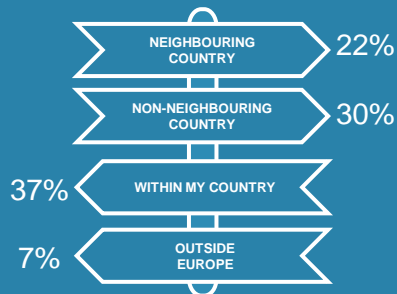


POPULAR TRAVEL PERIODS

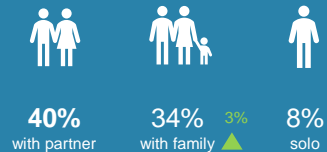


TRAVEL PLANNING

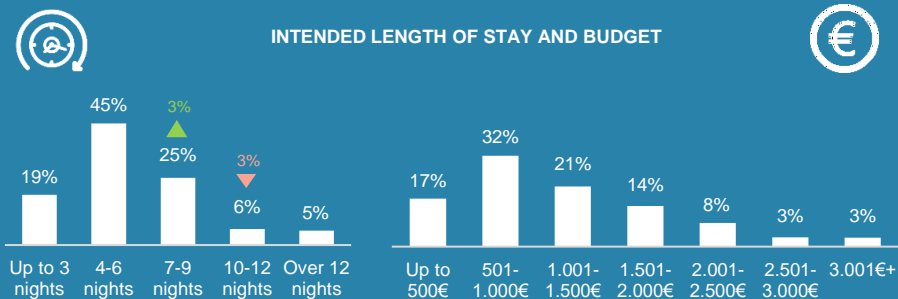
WHERE TO?



TRAVELLING WITH?

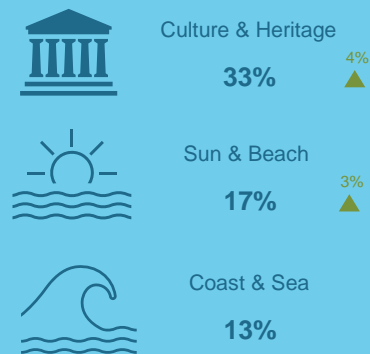


INTENDED LENGTH OF STAY AND BUDGET



PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS



TOP 5 EUROPEAN DESTINATIONS**

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

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

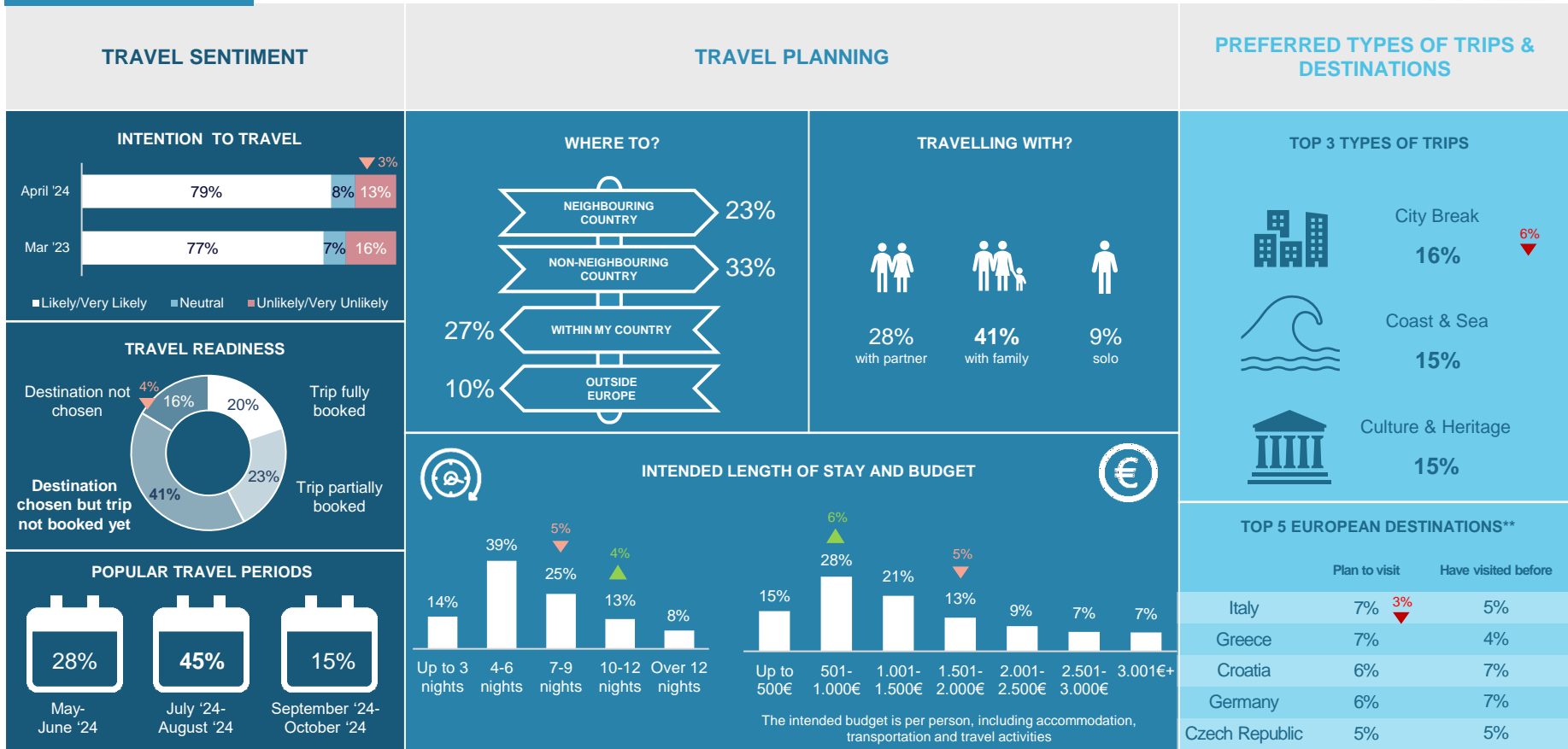
No. of respondents: 750 (total sample of respondents per country)

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

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

SNAPSHOT: POLISH TRAVEL PLANS

Travel horizon: May 2024-October 2024



25 * 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)

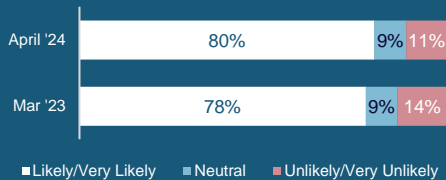
SNAPSHOT: SPANISH TRAVEL PLANS

Travel horizon: May 2024-October 2024

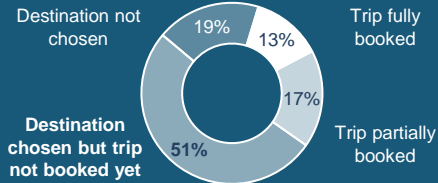


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

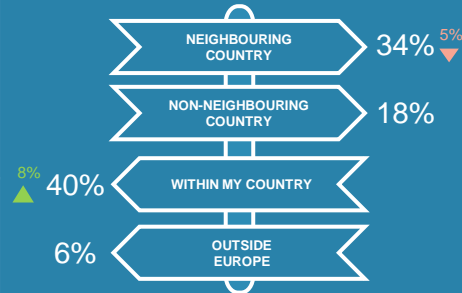


POPULAR TRAVEL PERIODS

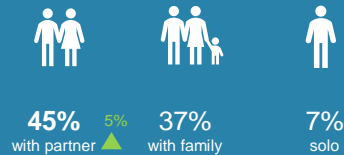


TRAVEL PLANNING

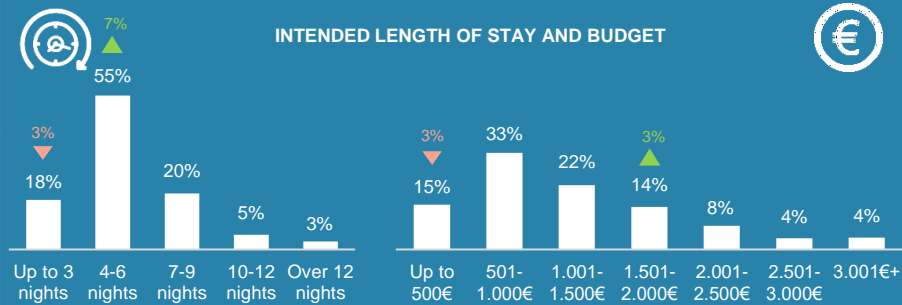
WHERE TO?



TRAVELLING WITH?



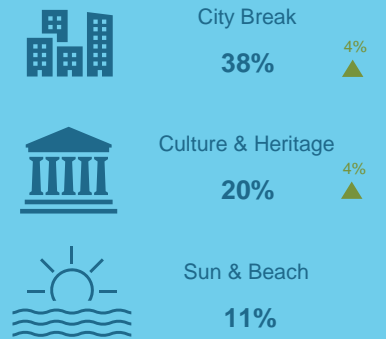
INTENDED LENGTH OF STAY AND BUDGET



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**

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

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

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

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

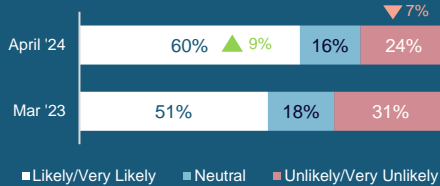
SNAPSHOT: SWISS TRAVEL PLANS

Travel horizon: May 2024-October 2024

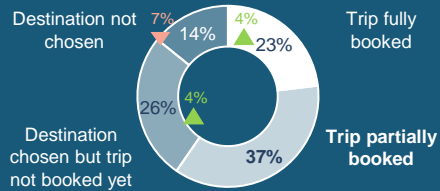


TRAVEL SENTIMENT

INTENTION TO TRAVEL



TRAVEL READINESS

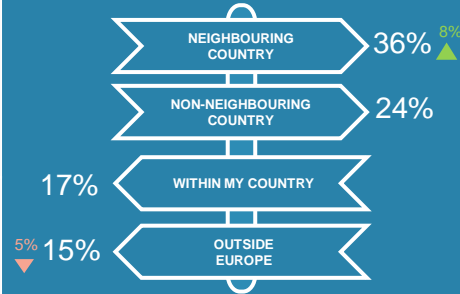


POPULAR TRAVEL PERIODS

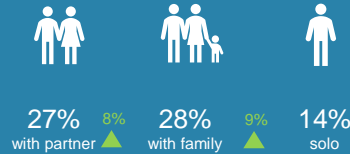


TRAVEL PLANNING

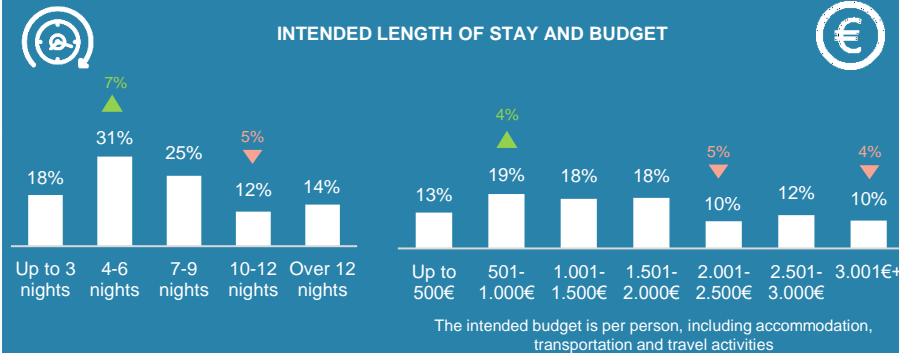
WHERE TO?



TRAVELLING WITH?

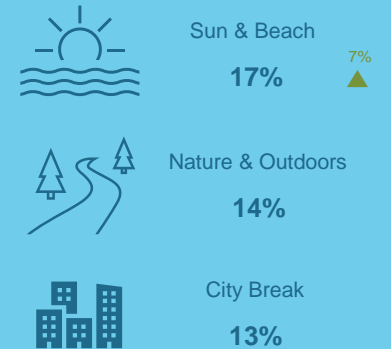


INTENDED LENGTH OF STAY AND BUDGET



PREFERRED TYPES OF TRIPS & DESTINATIONS

TOP 3 TYPES OF TRIPS



TOP 5 EUROPEAN DESTINATIONS**

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

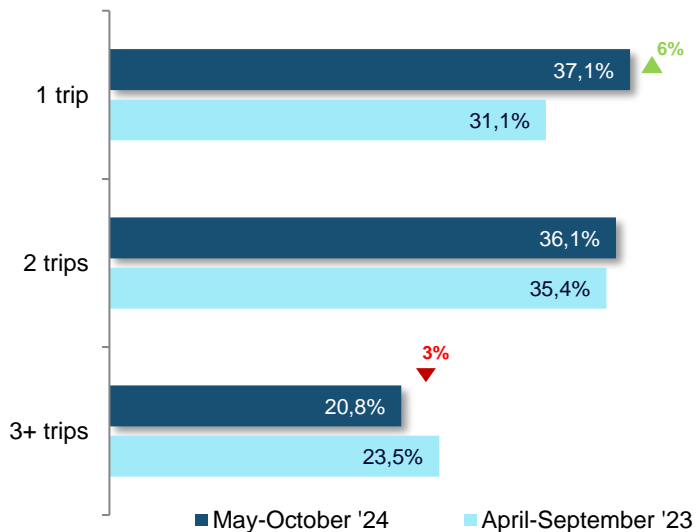
PLANNING THE DETAILS

02

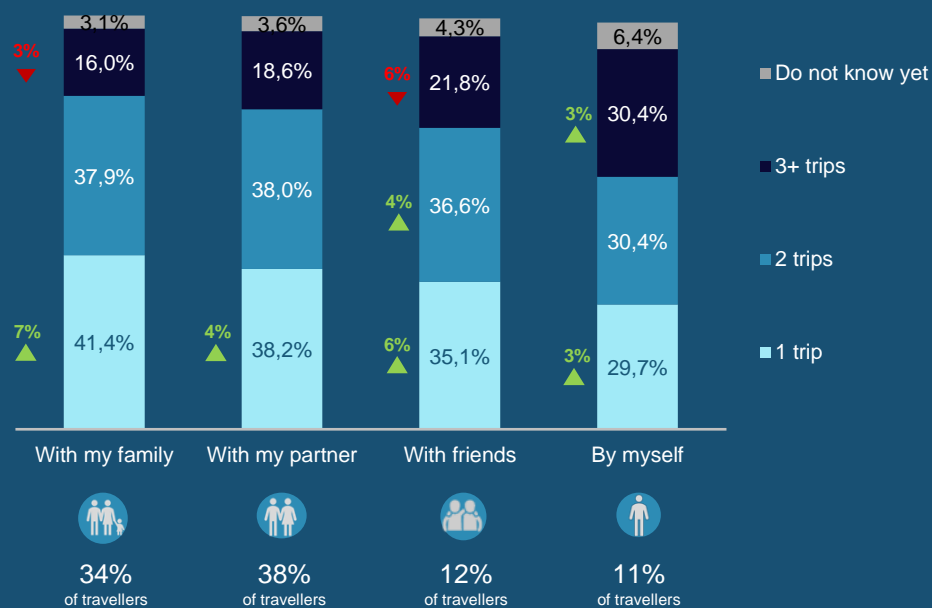
57% of Europeans plan to travel multiple times between May and October. Solo travellers and those travelling with their friends are the most likely to take numerous trips



Number of intended trips within Europe in the next six months



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



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

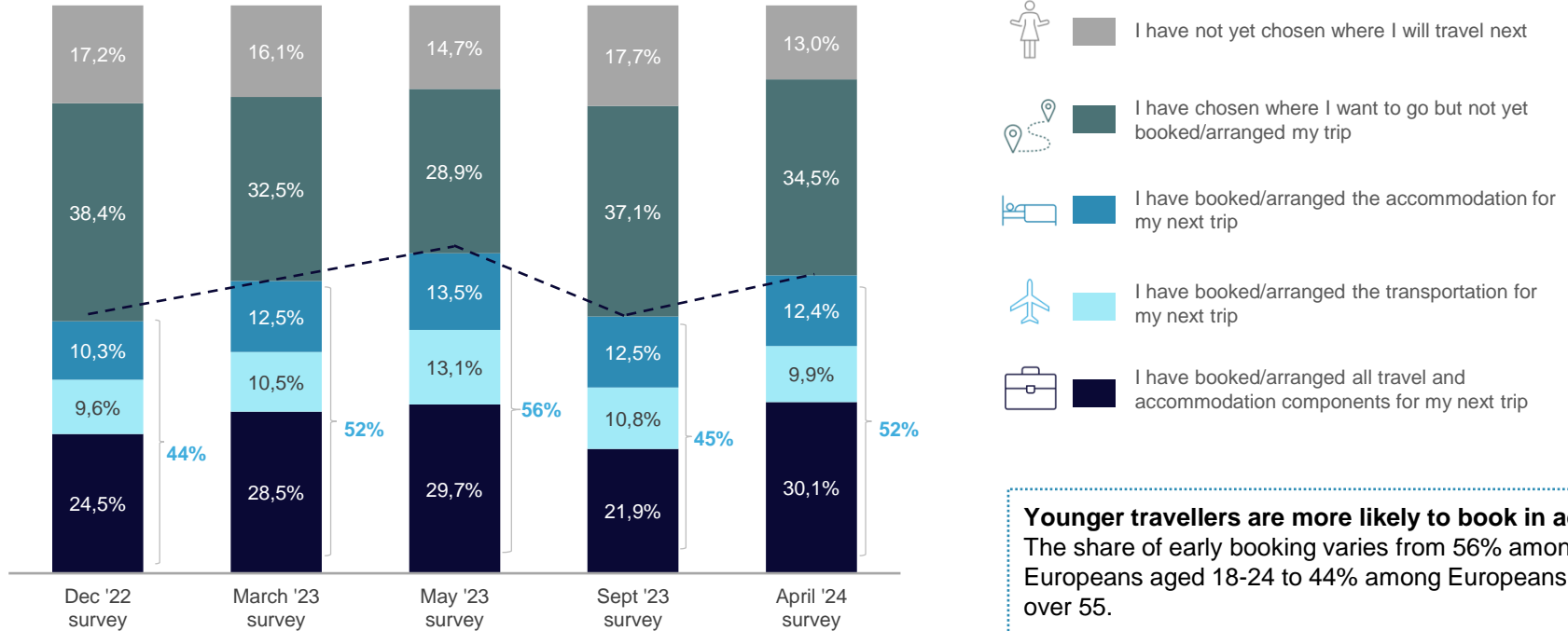
* Statistically significant difference vs a year ago (March 2023)






* 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)

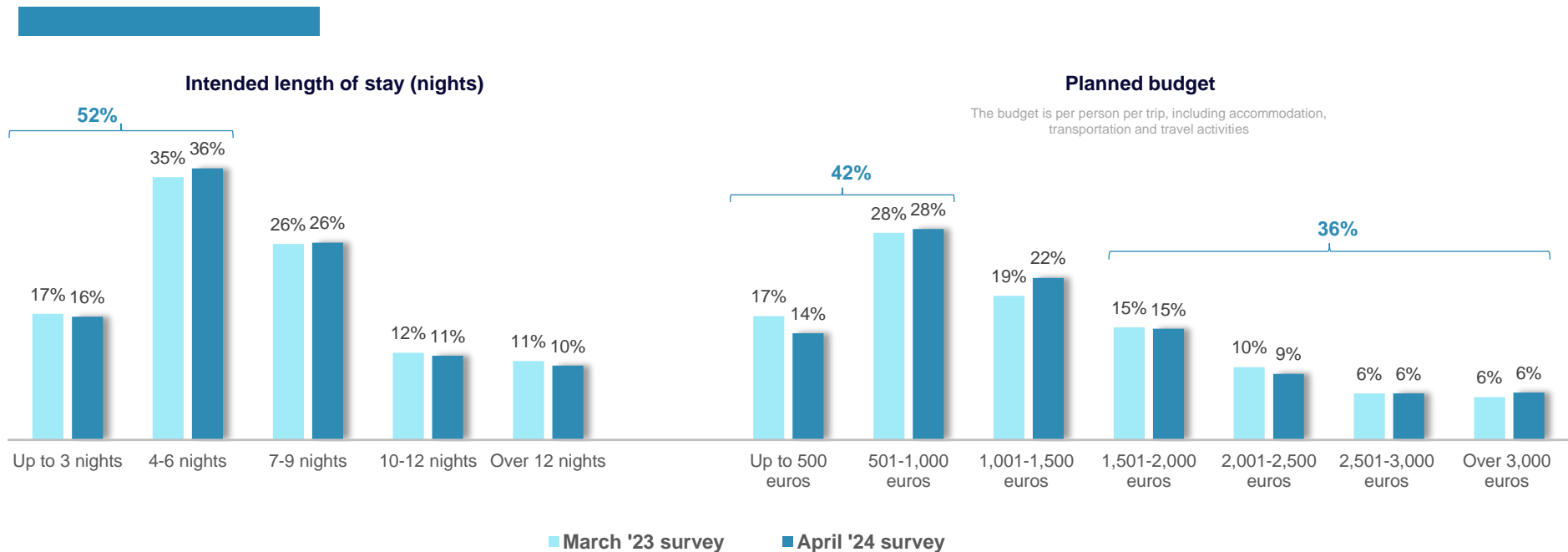
Planning status for the next trip



-  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

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.

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)?

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

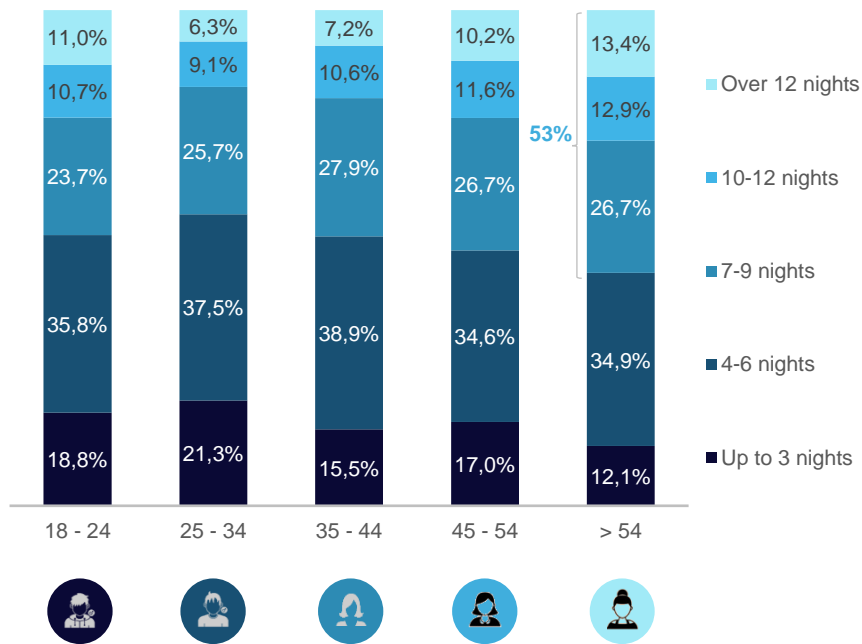
Q18. What would be the length of your next overnight trip?

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



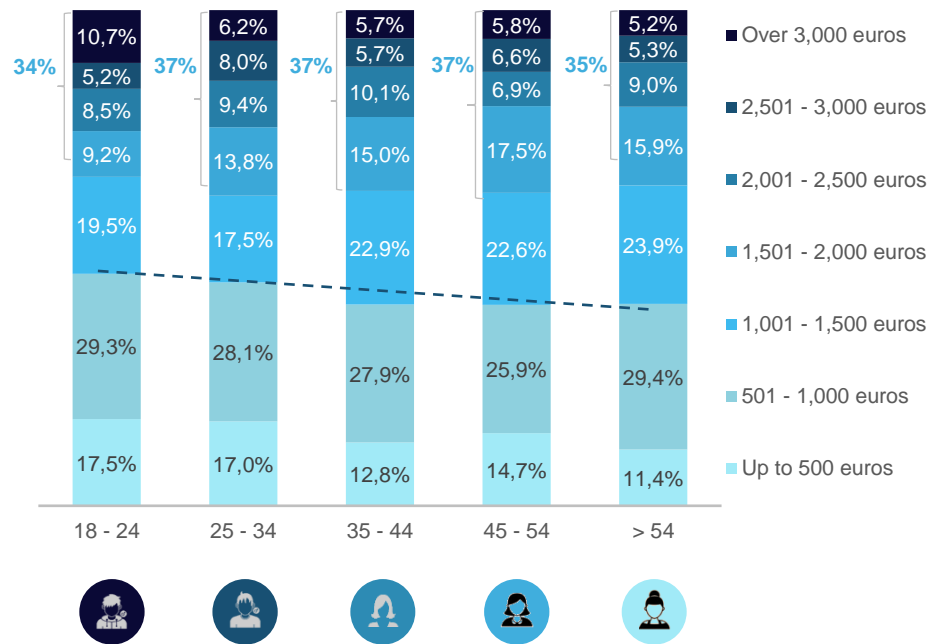
Mature Europeans, over the age of 55, are the most likely to take longer trips and spend over 1,000 euros

Intended length of stay (nights)



Envisaged budget

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



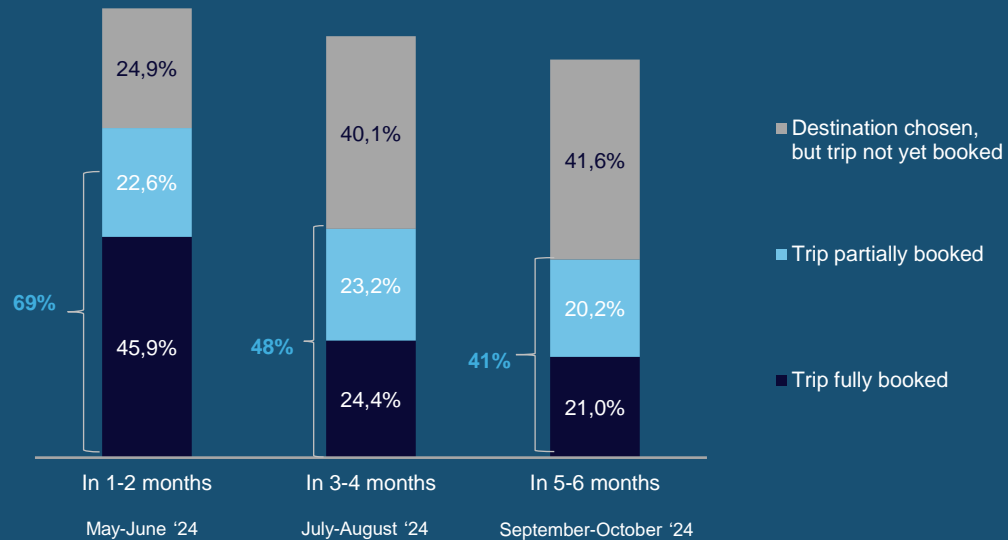
Q18. What would be the length of your next overnight trip?

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

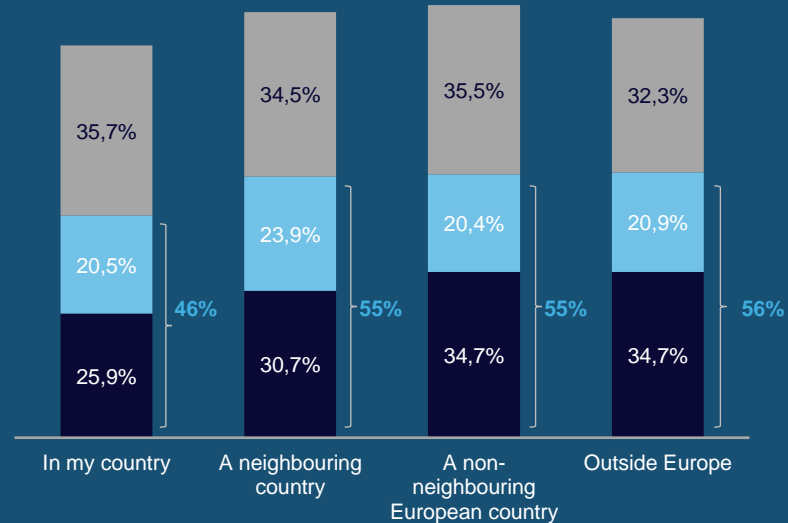
48% of Europeans have already booked their trip for the coming summer. Travellers heading for domestic trips are the least likely to pre-book.



Booking status and timing of next trip



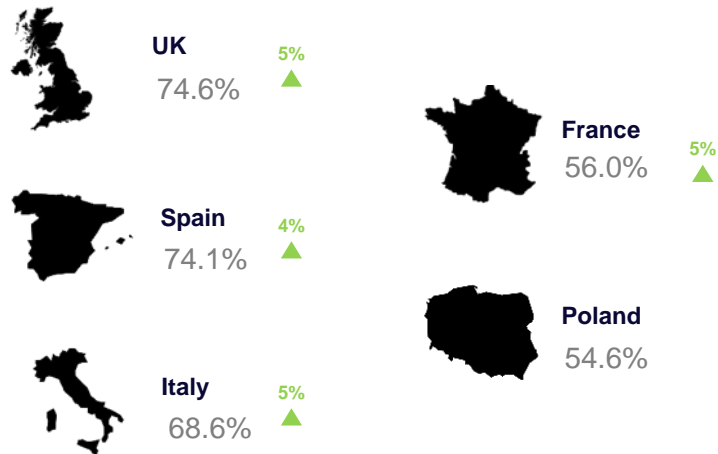
Booking status and travel destination



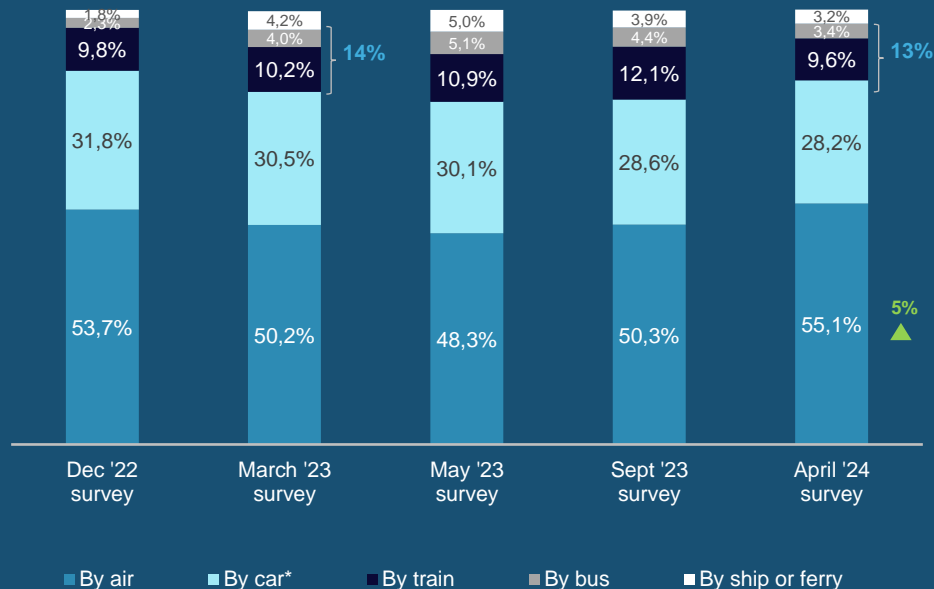
April '24 survey

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



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



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

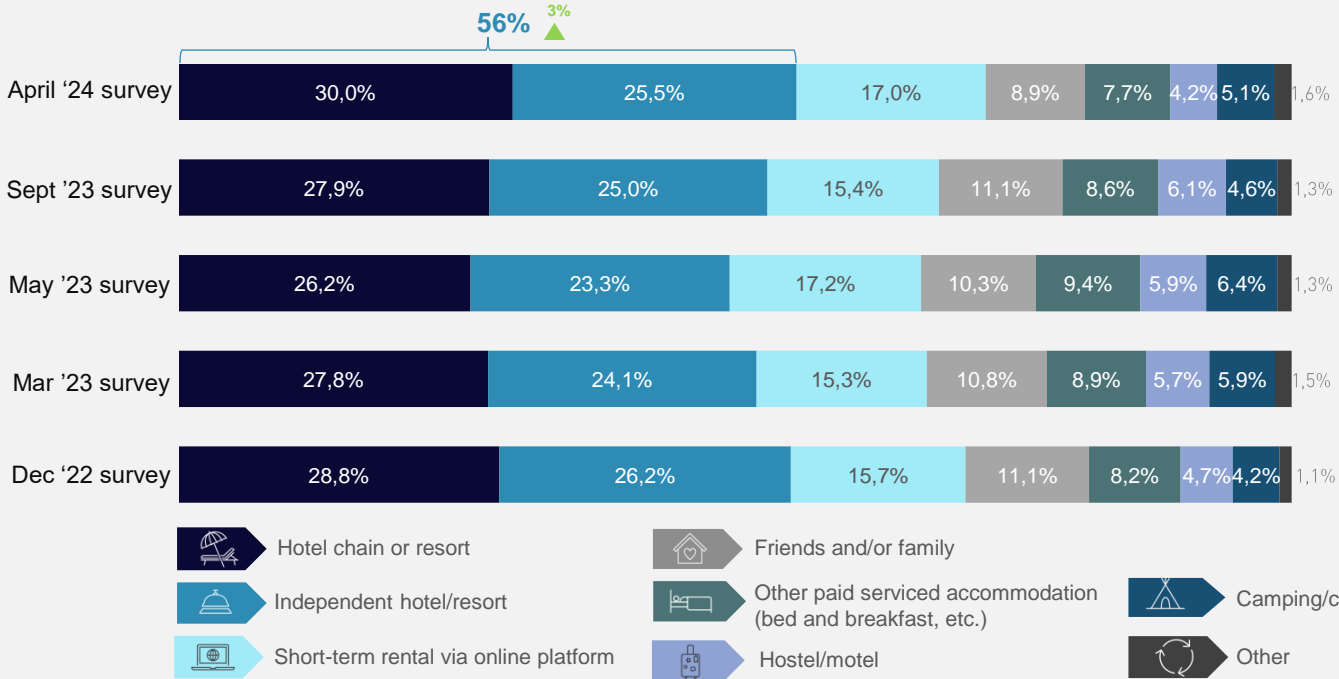
Statistically significant difference vs a year ago (March 2023)

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

No. of respondents: 4,419

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



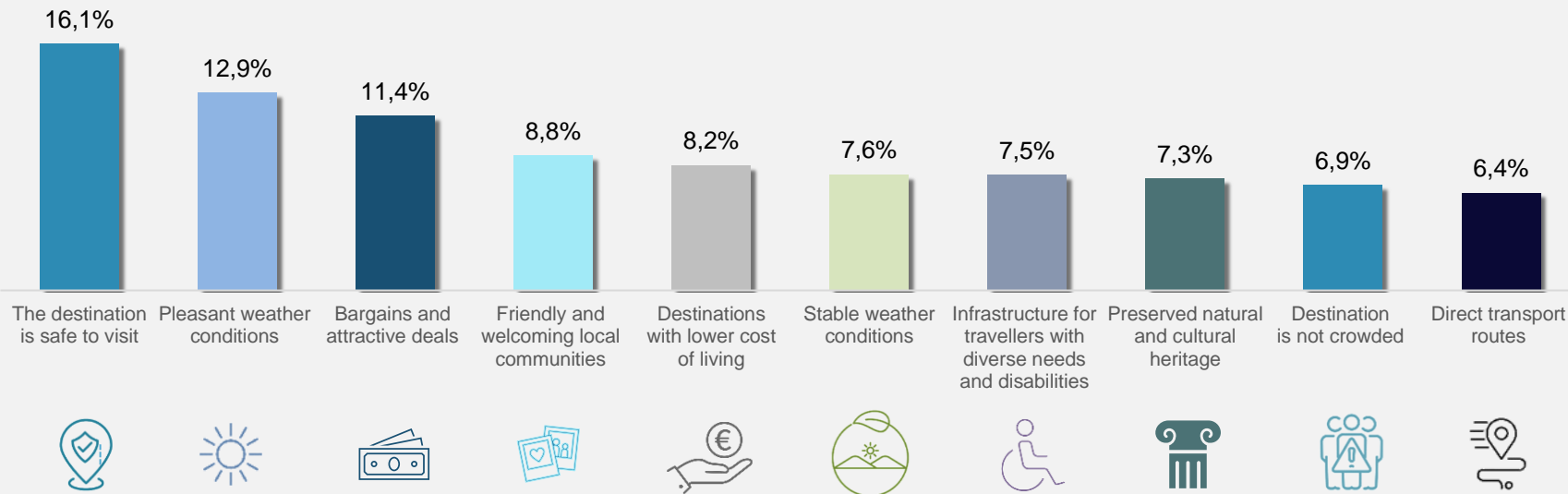
Europeans aged 18-34 are more likely to stay in short-term rentals (21% vs. 15% among older age groups); travellers aged over 35 are more likely to opt for a hotel (56% vs. 46% among younger age groups).

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)

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

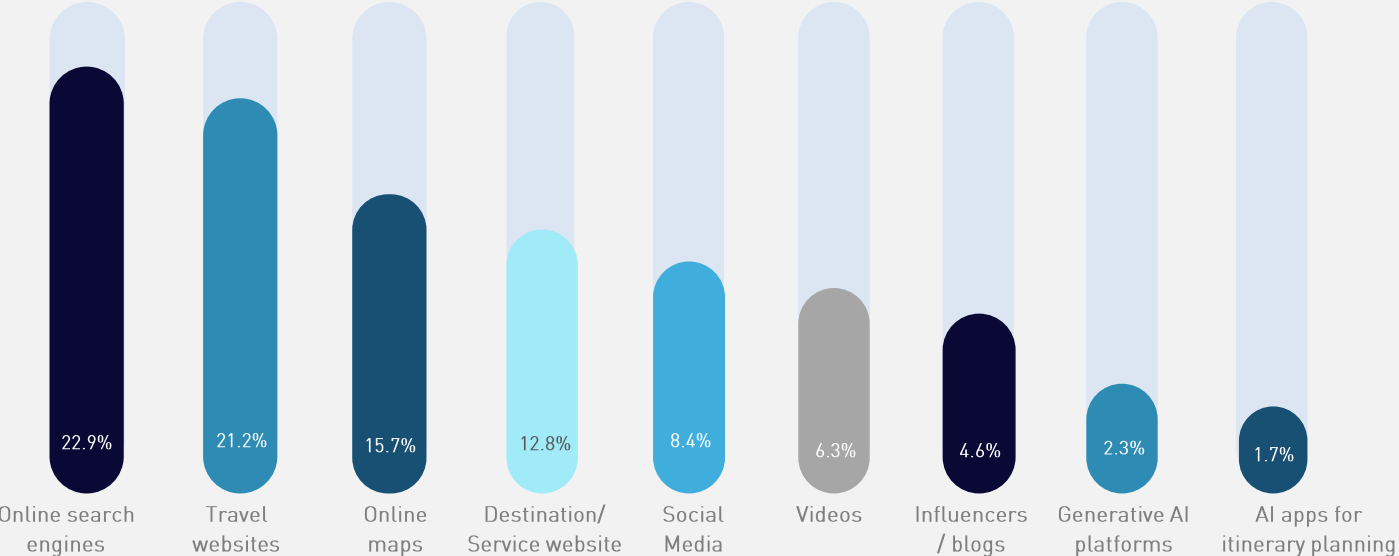
Top 10 criteria for choosing the next travel destination*



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.

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).

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

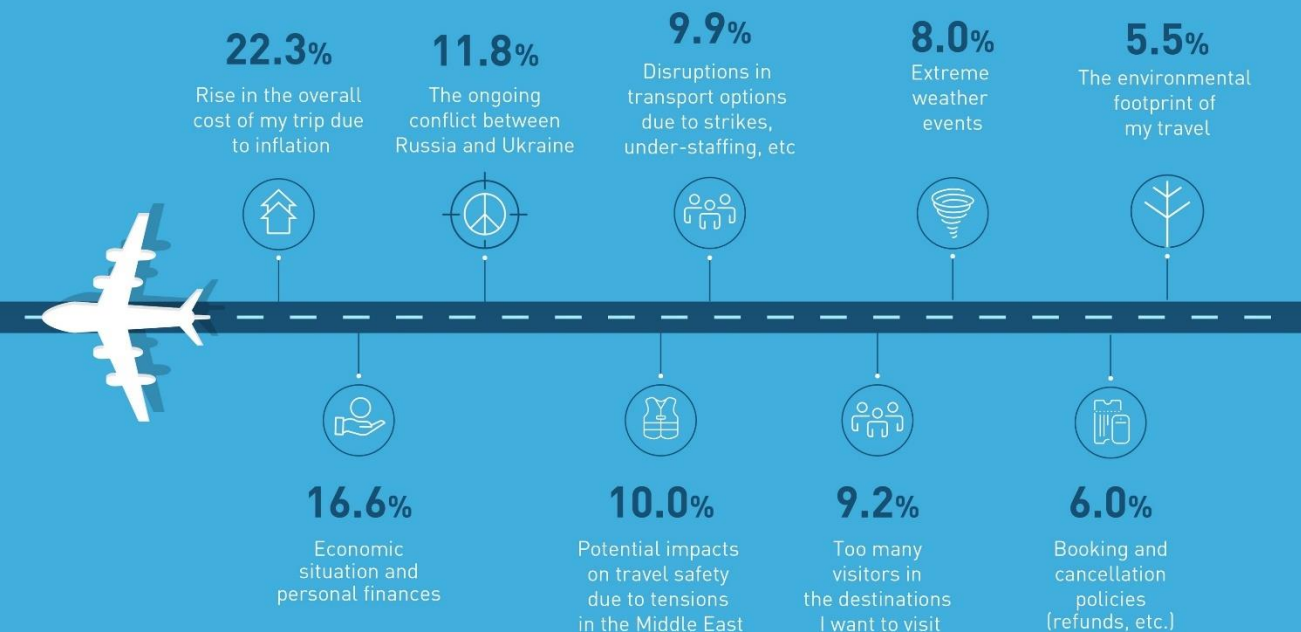
No. of respondents: 5,859

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

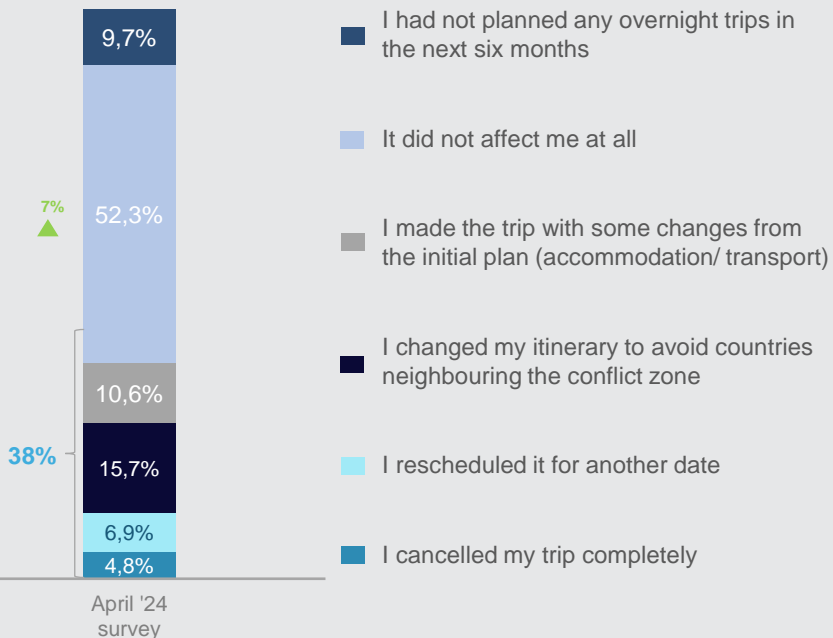
Spain	25%	3% ▼
France	23%	
Italy	23%	
UK	22%	3% ▼

Top 4 markets concerned with personal finances

Spain	17%	3% ▼
Germany	17%	
UK	17%	
Belgium	17%	

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



Switzerland

51.7%

6% ▲



Poland

50.2%

7% ▲



Italy

42.4%



Netherlands

40.0%



Belgium

39.4%

Most often mentioned change:

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

17%

18%

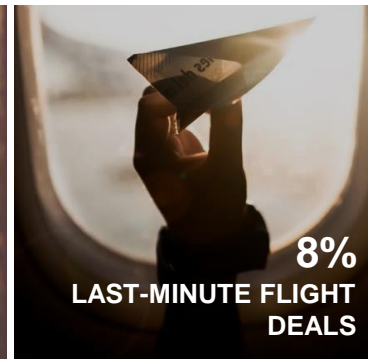
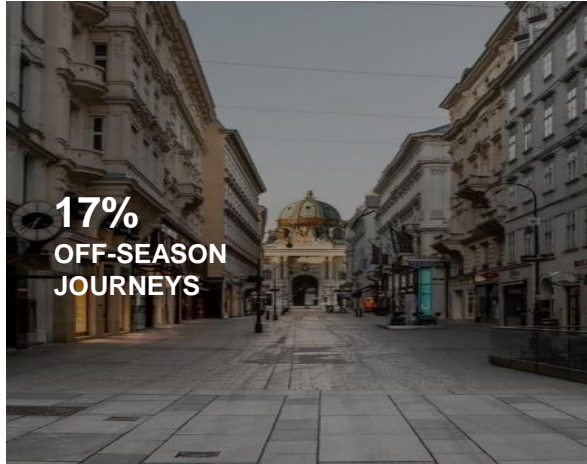
23%

16%

11%

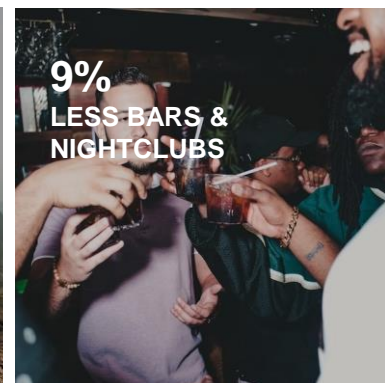
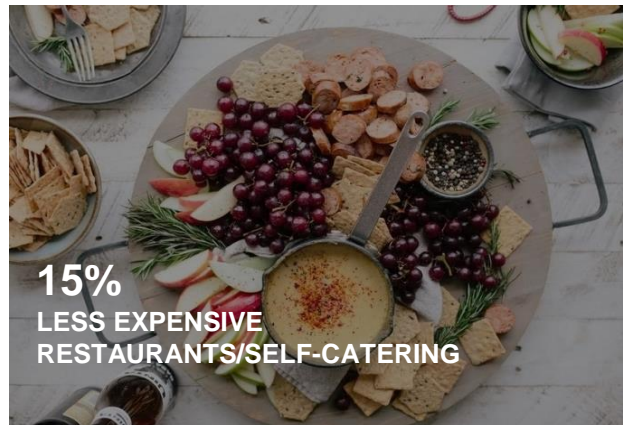
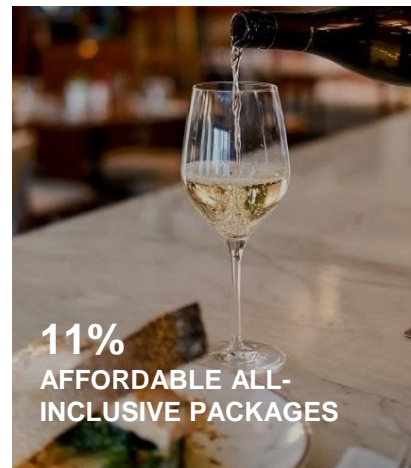
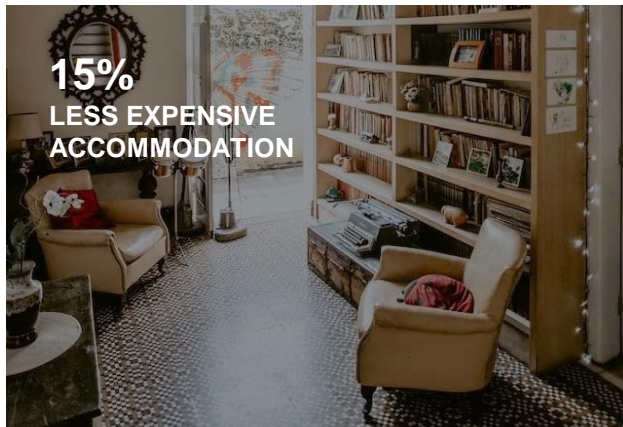
EUROPEANS ARE ADAPTING TRAVEL PREFERENCES PRIOR TO REACHING THEIR DESTINATIONS

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



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

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

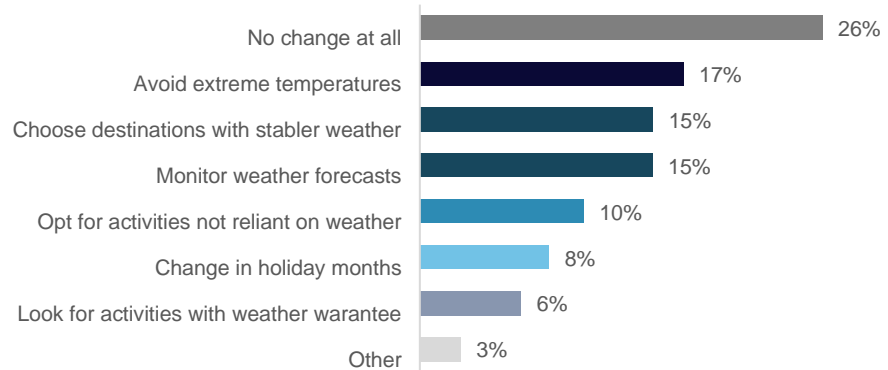


Europeans adjusting travel habits according to changing climate

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

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Study on Monitoring Sentiment for Intra-European Travel

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

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

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