EUROPEAN TRAVEL COMMISSION

EUROPEAN TRAVEL COMMISSION
Rue du Marché aux Herbes 61
1000 Brussels – Belgium
Tel +32 2 548 90 00 – Fax +32 2 514 18 43
www.etc-corporate.org

INTRA-EUROPEAN TRAVEL MONITORING

Executive Briefing – Wave 12 (May 2022)

This **Executive Briefing** reports on sentiment and short-term intentions for domestic and intra-regional travel within Europe and refers to the **12th wave of market research**, conducted in May 2022. Responses are collected from European citizens from 10 high-volume source markets[1] in light of COVID-19 and the ongoing conflict in Ukraine.

The main findings of Wave 12 are as follows:

- Europeans' travel sentiment in the coming six months remains high. Of all surveyed **Europeans (N=6.005), 73.1% intend to travel between June and November 2022**. The desire to travel is 62.2% among 18-24 years old and 78.4% among 55+ years old.

The findings below refer only to Europeans who intend to travel between June and November 2022 (N=4.391).

- **Of those respondents who are open to travelling in the following months, 34% will take one trip**, while **37.9% say they will travel twice**. 19.9% will head for more than three trips.
- **57.5% plan to travel within Europe** (vs 55.8% in the previous wave): 30.5% will head towards a neighbouring country and 27% to a non-neighbouring one. 31.4% opt for domestic trips.
- The **travel intention is stronger for the summer months**: **41.4%** will take a trip in June or July, **42.3%** in August-September and **10.4%** in October or November.
- **Spain remains the most popular destination** (10.2%) and is currently caught up by **France** (10.1%). Italy (9.6%), Greece (6.6%) and Croatia (5.6%) complete the top 5.
- **Most Europeans (73.3%) will travel for leisure,** and 14.2% will visit friends or family. 5.6% will attend an event for personal purposes (e.g., sports, educational event, exhibition, festival, etc.), while 4.6% will travel for business.
- In line with the approaching summer, **21.8% of Europeans will head for Sun & Beach holidays,** and **another 14.3% opt for Coast and Sea[2]**. City Breaks and Nature & Outdoors journeys are equally preferred (14.6% each), while Culture & Heritage trips are the choice of 13% of respondents.
- **39.3% of Europeans will embark on a family vacation** in the next six months, and **36.9% will travel with their partner**; 10.9% will take a trip with friends, and 9% opt for solo holidays.
- **Air transport is the choice of 46.9%** of respondents (vs 50.4% in wave 11). 34.1% will drive their car, and 10.4% will take a train or bus to their next destination.
- **Hotels and resorts are the leading accommodation options for 51.8% of respondents** (27.4% prefer renowned chains, while 24.4% favour independent hotel brands). 15.3% will choose short-term rentals,

[1] Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria.

[2] "Coast & Sea" and "Sun & Beach" holidays are separated 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.

and another 11.7% will stay with friends or family.

- **34.4% of Europeans intend to stay for 4-6 nights** at the destination, while 26.7% will opt for a 7-to-9-day trip. **Longer trips of 10+ nights** are planned by **23.7% of respondents**
- **In terms of intended spending per person[3]:**
  - **30,6%** of Europeans plan to spend **€501-€1,000**;
  - **19.9%** envisage a budget of **€1,001 to €1,500**
  - **32.2%** plan to spend more **than €1,500** (vs 29.7% in the previous wave).
- Travel readiness increases before summer: **32.2% of Europeans have made all needed arrangements** for their next trip[4] (vs 26,1% in the previous wave). However, **33.7% of Europeans have chosen the destination but have not yet booked flights or accommodation.** 13.4% of respondents have not yet decided where to travel next.
- Although it is a concern for 14.4% of Europeans (see the next bullet point), **the ongoing conflict in Ukraine does not seem to impact Europeans' travel plans too strongly.** 29.2% of Europeans had to modify their trip due to the war, but a larger share **of respondents (43.9%) have not altered any trip component** (e.g., itinerary, date, etc.)**.**
- **The cost of travel is currently the most acute concern for travel-ready Europeans**: **17.9% worry about the rising trip costs** due to inflation and **12.6% about the economic situation** and their finances (vs 8.7% in the previous wave). The war in Ukraine is another source of concern regarding travelling, for **14.4**%. **COVID-19 still worries European travellers, though to a lesser extent**: 10.7% of respondents refer to sudden quarantine measures during the trip (vs 17% in the previous wave), and 9.5% point out rising COVID-19 cases at the destination (close to 9.9% in the last wave).
- Regarding the criteria for choosing their next holiday spot, Europeans look for destinations with **pleasant weather conditions (16.9%)** and **attractive deals and bargains** (14.9%). **Less crowded destinations (10.6%)** and places with **friendly, welcoming local communities** (9.8%) are also prioritised.
- In terms of sought-after experiences, Europeans' are most eager to **enjoy nature & scenic landscapes** (18%), **taste the local cuisine** (16%) and **experience the local culture & lifestyle** (15.1%). Finally, **seeing famous landmarks** (13.3%) and **getting to know the history & heritage of the destination** (11.9%) complete the top-6 of most valued travel experiences.

NB:

1. **Wave 12 data collection period**: 09/05/2022 - 12/05/2022
2. **Wave 12 sample size**: 6,005 (total) – 4.391 (most likely to travel in the next six months) – 4,463 (selecting outbound destinations within Europe)

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[3] Includes: accommodation, transportation, and travel activities
[4] Refers to booking transportation to and accommodation at the destination