

## INTRA-EUROPEAN TRAVEL MONITORING Executive Briefing – Wave 13

Travel horizon October 2022 – March 2023

**Brussels, 3 October 2022:** This **Executive Briefing** reports on sentiment and short-term intentions for domestic and intra-regional travel within Europe and refers to the **thirteenth wave of market research** conducted in September 2022. Responses are collected from European citizens from 10 high-volume source markets<sup>1</sup> in the aftermath of COVID-19 and the context of new challenges for the travel industry, such as the ongoing conflict in Ukraine, rising inflation rates and the energy crisis.

The main findings of wave 13 are as follows:

- Europeans' travel sentiment remains high: **70.1%** of surveyed Europeans plan to travel in the next six months. The desire to travel is **stronger among 45-54 y.o. (74.5%) and 55+ y.o. (73.2%)**; while among the **Gen Z** respondents (18-24 y.o.), the percentage is lower but yet over half of them (**57.9%**) plan to travel between October 2022 and March 2023/
- Neither the pandemic nor the war in Ukraine seems to impede Europeans' travel plans at this moment seriously: **41.3% of respondents will proceed with their plans unaffected by COVID 19** (vs 34.3% in May 2022), while 52.1% of Europeans ( versus 43.9% in May 2022) shared that **the war in Ukraine has no impact on their planning**.
- However, financial challenges are of increasing concern: **rising costs of travel worries 22.8%** of Europeans and **the economic situation and personal finances 17.9%** (17.9% and 12.6% respectively in May 2022); as said, concerns about the ongoing conflict in Ukraine and implementation of sudden quarantine measures follow at a long distance (9% each).
- In this context, **bargains and attractive deals increase in importance** for European travellers (**17.1%**, compared to 14.9% in May 2022); pleasant weather conditions (18%) and less crowded places (11.4%) complete the top 3 criteria for choosing a holiday destination.
- **41.3% of Europeans will take one trip** between October 2022 and March 2023, and **36.4% will aim for two journeys** during the same period. **15.8%** of Europeans plan to head to three or more getaways.

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<sup>1</sup> Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria.

- **38.8% of travel intenders will take a trip in October or November, and 33.6% during Christmas** (December or January). Finally, **21% will travel in early 2023** (February or March).
- **72.1% will travel for leisure, 15.4%** will visit friends or relatives, 6.5% will attend an event, and 5% will embark on a business trip.
- **61.9% of respondents plan to travel outside their country but within Europe** (vs 57.5% in May 2022): 35.5% will head to a neighbouring country and 26.4% to a non-neighbouring one. **28.5% intend to take a domestic trip** (vs 31.4% in May 2022).
- **France is considered the most popular destination** for this autumn and winter (10.9%), followed by **Spain** (9.3%) and **Italy** (9.1%). Germany (7%) and Greece (6.4%) complete the top 5.
- For the upcoming months, Europeans tend to favour **City Breaks** (19.6%), **Culture and Heritage** (15.3%) and **Nature and Outdoors** (14.1%) trips. 13.5% will head for Sun and Beach holidays, and 10.9% opt for Coast and Sea getaways.
- **39.7% of European travellers will stay at the destination for 4 - 6 nights** and **24.1%** for 7 - 9 nights. **23.1%** will head for shorter trips of up to 3 nights.
- The share of **respondents** planning to spend **up to €500 per person increased** from 17.3% in May 2022 to 21.2% now. **€500-€1,000 is the most common budget (31.6%)**. **20%** will spend €1,000 - €1,500, and **27.2%** have a budget higher than €1,500.
- The booking window is widening since **only 26% of Europeans who plan to travel until March 2023 have arranged the bookings for their trip**.
- Among those concerned with the cost of travel and/or personal finances, **only 19.2% have fully arranged** their next trip, while **27.1% have not yet decided on the destination** (vs 17.2% among all Europeans with short-term travel plans).

ENDS

**NB:**

1. **Wave 13 data collection period:** 13/09/2022 - 23/09/2022
2. **Wave 13 sample size:** 5,988 (total) – 4,199 (most likely to travel in the next six months) – 4,467 (selecting outbound destinations within Europe)

This executive briefing is based on research conducted by MINDHAUS ([www.mindhaus.gr](http://www.mindhaus.gr) and [www.vando.gr](http://www.vando.gr))

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