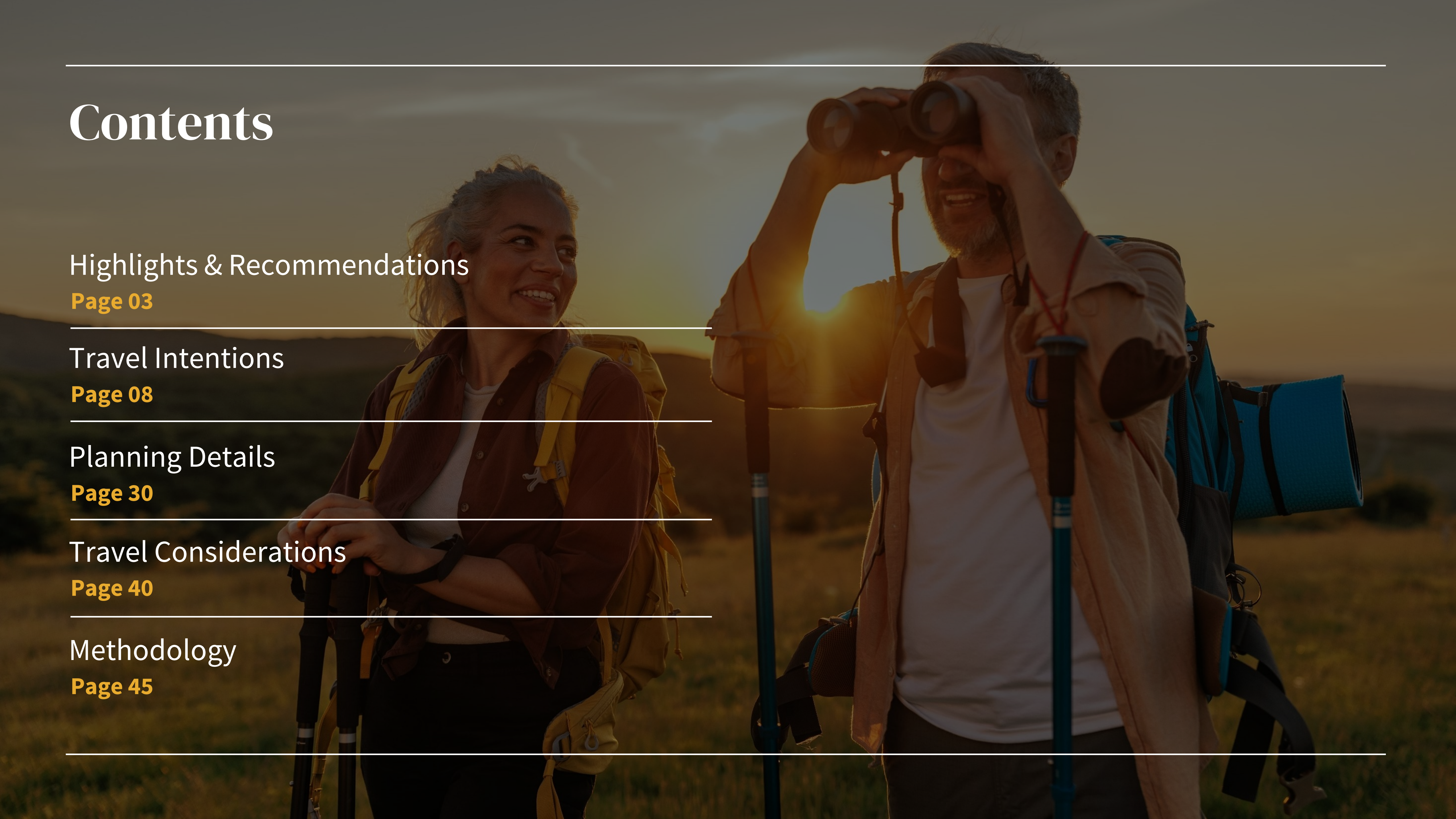
Monitoring Sentiment for Intra-European Travel

Autumn & Winter
2024/2025

Co-funded by
the European Union

EUROPEAN
TRAVEL
COMMISSION



Contents

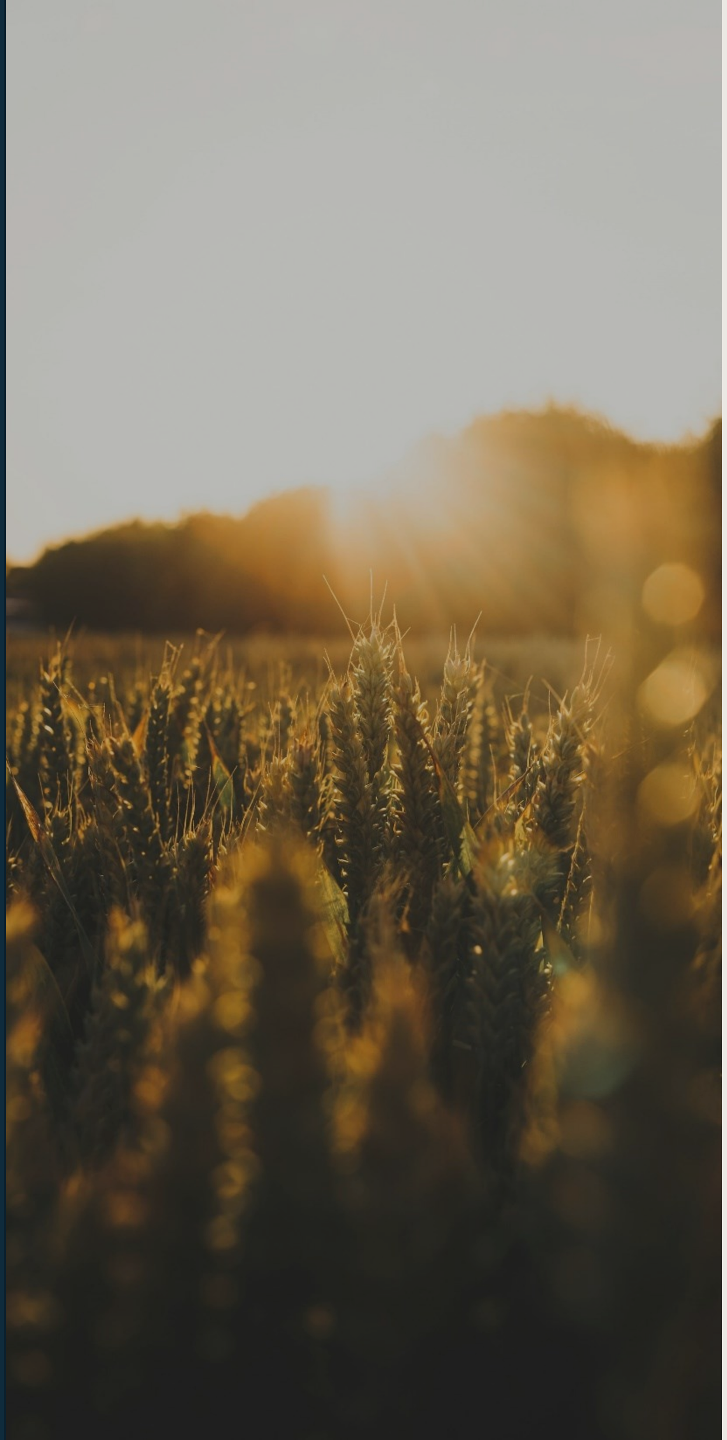
Research highlights

WAVE 20

This report tracks intentions and short-term plans for domestic and intra-European travel. It represents the 20th update of an ETC research project initiated in September 2020.

The findings are based on data collected in September 2024 from respondents in ten key European markets, focusing on travel plans from October 2024 to March 2025.

EUROPEAN TRAVEL COMMISSION



TRAVEL INTENTIONS

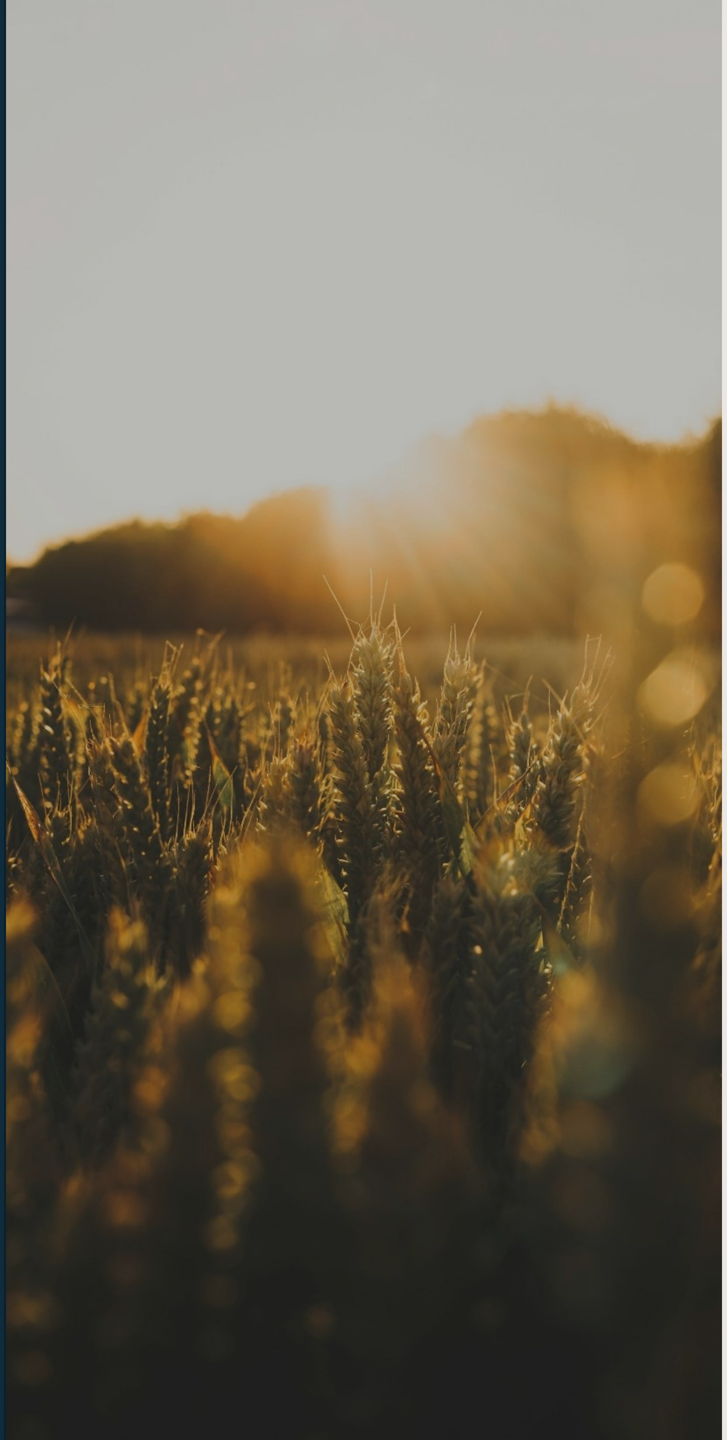
- European **travel intentions remain high**, with 73% of respondents planning to travel between October 2024 and March 2025, an **increase of 6% compared to last year**.
- Travel intention is strong across all generations; the most notable yearly increase is among Europeans aged under 45, with **those aged 35-44 being the most likely to travel (78%).**
- 39% of Europeans plan to travel between October and November 2024, and **33% consider visiting a neighbouring country**. October (23%) and December (23%) are the most popular travel months.
- **Half of Europeans (51%) plan to explore less-touristic destinations** in the countries they will visit.
- Among those planning to travel in the next six months, **68% intend to take a leisure trip**, 15% will visit friends or relatives, and 8% will travel for business.
- As autumn arrives, **Culture & Heritage (18%) and City Break (17%) trips take the lead,** while Sun & Beach trips (14%) have dropped to the third place.

TRIP PLANNING

- In the upcoming months, 38% of Europeans will take a single trip, while a significant **56% plan to travel multiple times**.
- **Younger Europeans** (18-24 years old) are **most likely to embark on several journeys** (60% vs. 42% for those 55+).

Research highlights

WAVE 20



TRIP PLANNING

- **44% of Europeans have fully or partially booked their next trip**, same as last autumn and 12% below the pre-summer booking rush recorded in May 2024 (56%).
- **Trips lasting 4-6 nights remain the most popular** choice of Europeans (43%, up by 3% compared to last year) while travel budgets increase, with 39% of travellers planning on spending over 1,500 euros (+5%).
- **Air travel remains in high demand (53%)**, while car travel has dropped to its lowest recorded level (26%) since September 2020.
- **Hotels are the top choice for 54% of Europeans,** and short-term rentals steadily hold the second place (17%).
- The leading digital touchpoints for planning trips are travel websites (21%), search engines (21%), and online maps (15%). Meanwhile, **the share of travellers using AI tools and platforms has grown to 7%,** since spring 2024 (+3%).

TRAVEL CONCERNS

- **Destination safety is the top consideration** for Europeans when choosing a travel destination **(18%),** followed by stable weather and attractive bargains or deals (12% for both).
- **The cost of travel remains the leading concern for European travellers (19%)**, although decreased for three consecutive research waves (-3% compared to last year).
- Almost 4 out of 5 Europeans **(79%) reported making some adjustments to their travel habits due to the changing climate**. The most common habit is checking weather forecasts before finalising the travel plans (18%).

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WAVE 20

Recommendations for destinations

- Travel intention has increased among travellers aged 18-24 (+8%), along with the interest in taking multiple trips. This should encourage **Sun & Beach and City Break destinations to target this demographic segment**, attracting 17% and 16%, respectively. Despite being labelled as the “TikTok Generation”, focus should be placed on their preferred digital platforms: **search engines (40%), travel websites (33%),** and **online maps (29%).**
- The high level of interest in lesser-known destinations (51%) and concerns about overtourism (9%) brings a great opportunity for **'off-the-beaten-path' locations to highlight (and use as key marketing assets) both their welcoming local community and cultural uniqueness.**
- Car travel is particularly popular for Nature & Outdoor holidays (41%). To reduce the need for personal vehicles, destinations could offer **efficient shuttle services that run between key locations**, **popular nature sites**, and **trailheads**.
- Safety is a key factor for travelers when choosing a destination (18%), and destinations should improve safety by implementing and reinforcing **health regulations**, **training employees** on safety measures well as developing **crisis management plans**. Equally important is **communicating these measures through the destination’s website and social media**, ensuring travelers are informed and feel reassured when deciding to visit.

WAVE 20

Recommendations for businesses

- Two out of five Europeans have chosen their destination but have not yet booked it (+3% compared to a year ago). Travel businesses should target this segment by **offering limited-time attractive deals**, **exclusive benefits that require advance registration**, and other **incentives for early-bird bookings**.
- As Europeans increase their travel budgets, businesses can further **develop premium sustainable experiences**, such as **buy-local luxury shopping**, **farm-to-table fine dining**, **upscale eco-lodges**, or **glamping in remote natural reserves**.
- In response to unpredictable climate events and travellers' sensitivity to such conditions, businesses can implement **flexible cancellation policies, offering full or partial refunds** in the event of extreme weather.
- Among Europeans who prefer LGBTQ+ friendly destinations, 53% have a travel budget exceeding 1,500 euros. Businesses catering for these high-value travellers can strengthen their LGBTQ+ profile by **fostering a welcoming and inclusive environment**, offering LGBTQ+ **sensitivity training for staff**, and **partnering with LGBTQ+ organizations and travel influencers**.

WAVE 20

Reading the data

Data collection periods

Wave 17	8 May- 4 June 2023
Wave 18	2-17 April 2024
Wave 19	25 May -7 June 2024
Wave 20	7-23 September 2024

Analysed samples

- Total respondents: 6,001
- Respondents most likely to travel in the next six months: 4,399
- Respondents planning to travel internationally within Europe (not necessarily in the next six months): 4,901

Travel timings for Wave 20

The following time periods should be used as a reference when interpreting the desired travel period

In 1-2 months:	October-November 2024
In 3-4 months:	December 2024-January 2025
In 5-6 months:	February-March 2025

Significant changes

Changes are assessed with a 2.5% threshold for significance and marked with the following symbols:

Increase ▲ Decrease ▼

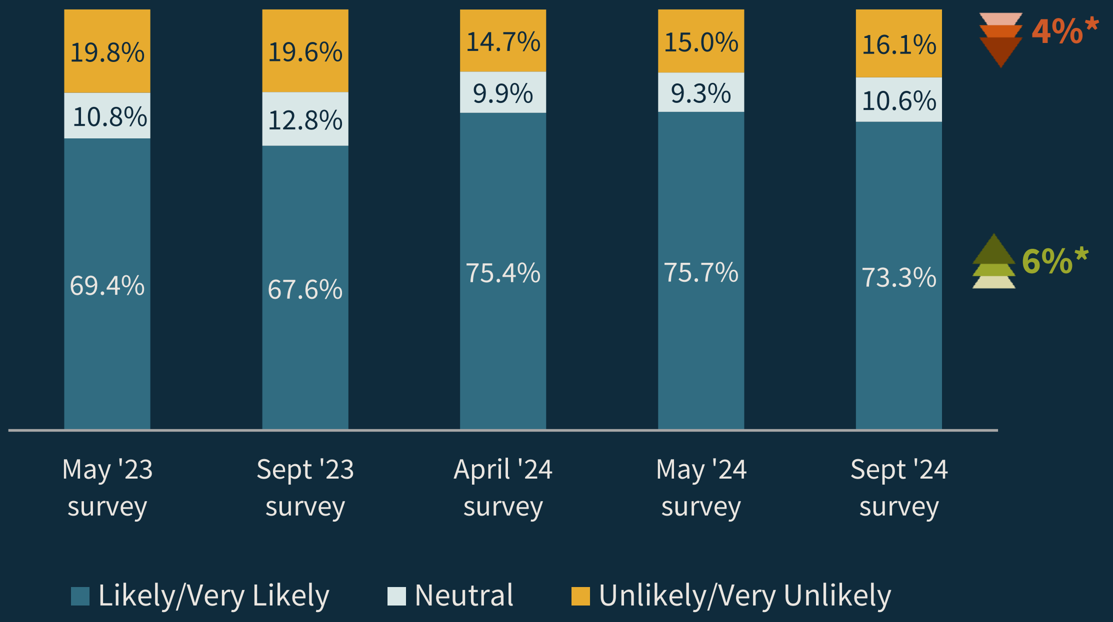
All data and insights refer to domestic and intra-European travel unless otherwise stated.

Travel intentions

01

Europeans' travel intention is up by 6% over September 2023

Intention to travel in the next six months



Q6. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

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

UK

84% 11%*

GERMANY

79% 15%*

FRANCE

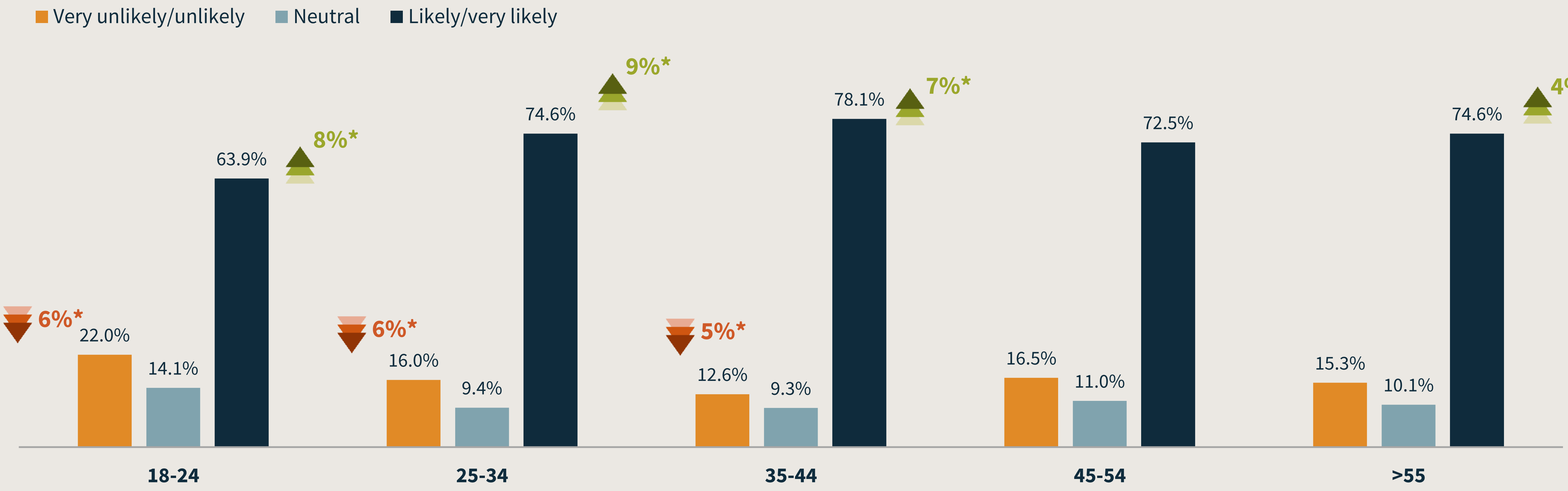
78% 15%*

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

No. of respondents: 6,001

Travel sentiment is strong across all generations, with the most notable yearly increase among Europeans aged below 45

Intention to travel in the next six months by age group



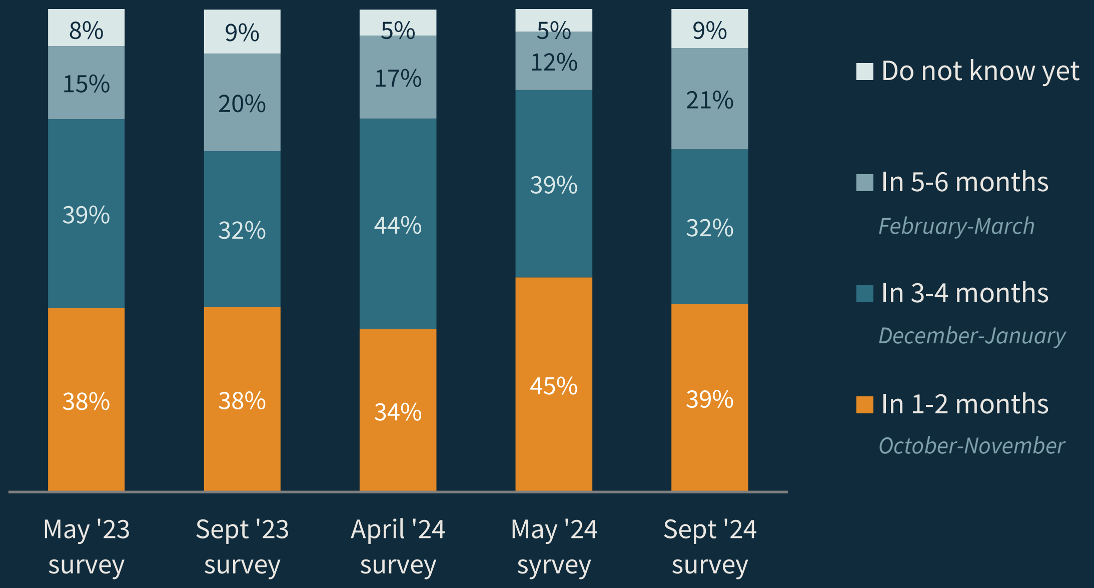
***** Statistically significant difference vs a year ago (September 2023)

Q6. Do you plan to take an overnight trip domestically or within Europe in the next six months, either for personal or professional purposes?

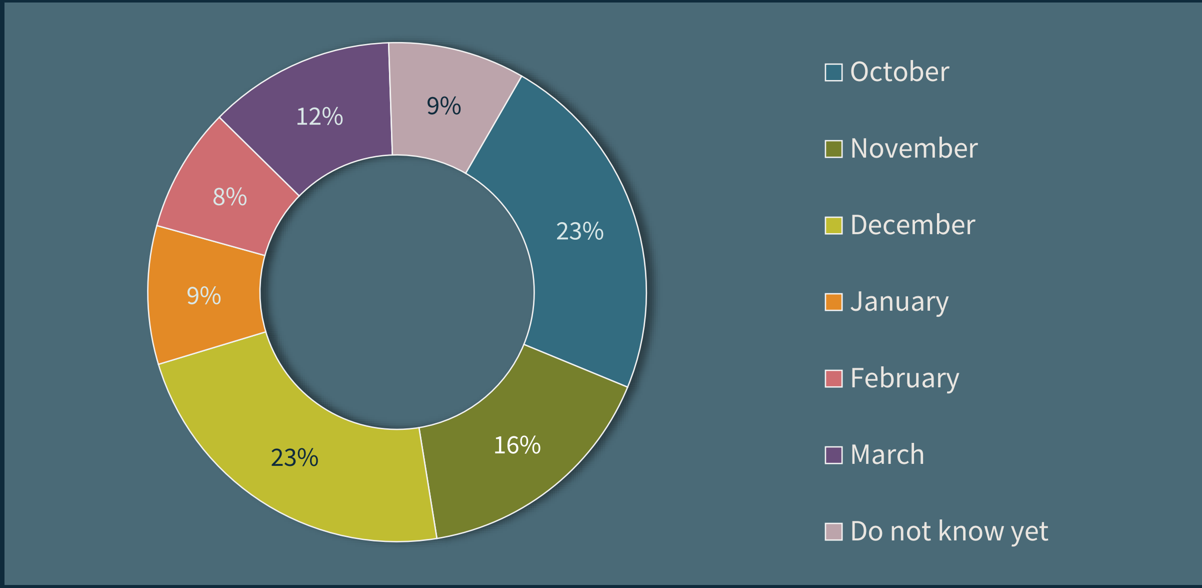
No. of respondents: 6,001

71% of Europeans will travel by the end of the year

Travel period



Travel month



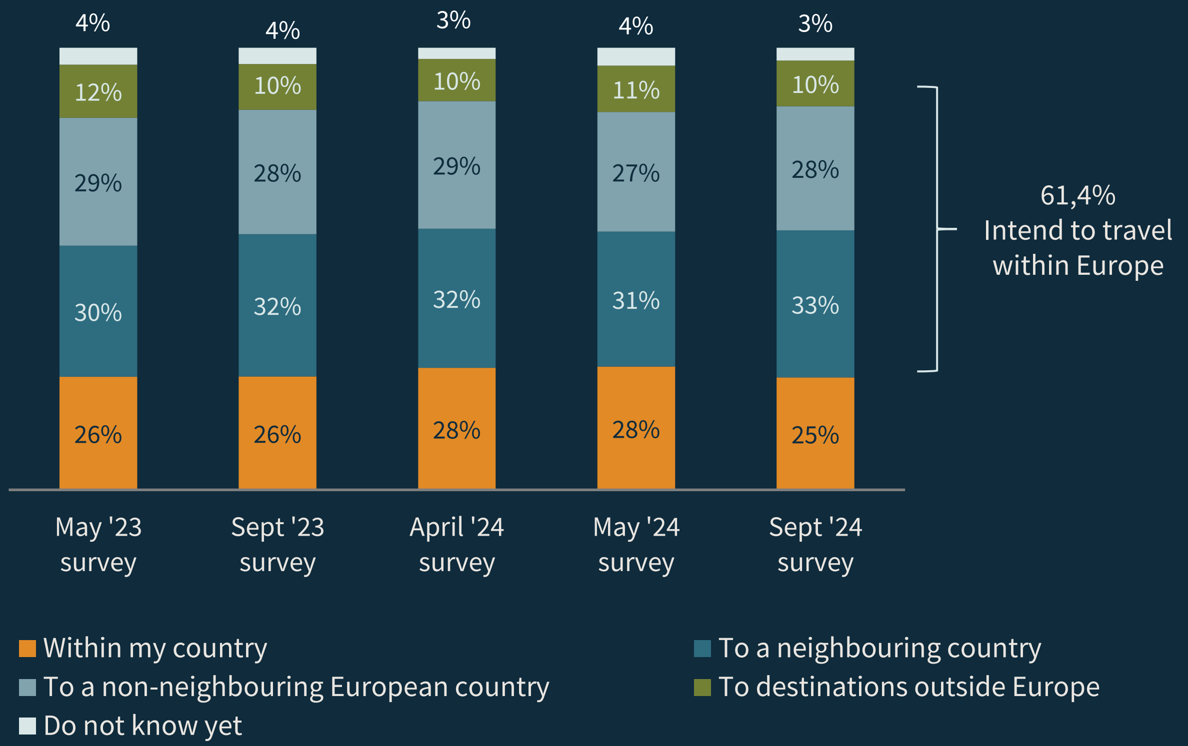
* Statistically significant difference vs a year ago (September 2023)

Q9. When are you most likely to go on your next trip either in your country or within Europe?

No. of respondents: 4,399

Visiting a neighbouring country is the most popular choice (33%)

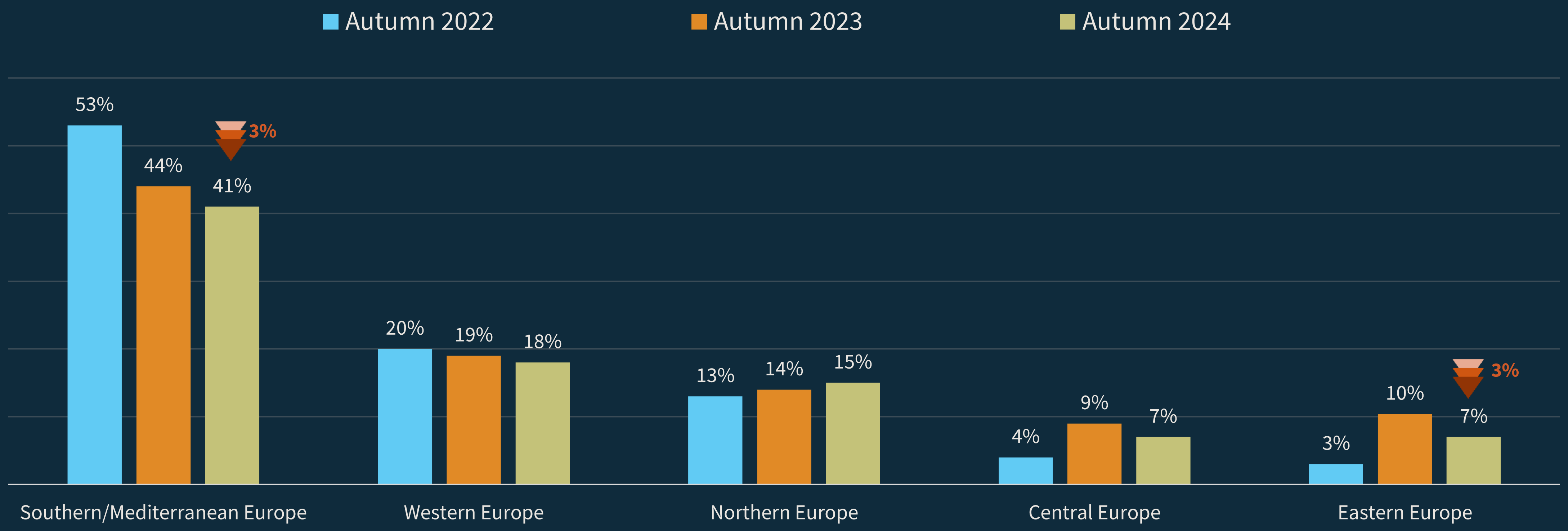
Where will Europeans travel within the next 6 months?



Q10. Where do you plan to travel in the next 6 months?

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

Intentions to visit the Mediterranean and Eastern Europe this autumn and winter slightly drop



Statistically significant difference vs the previous year

Definitions of the regions can be seen in the Methodology

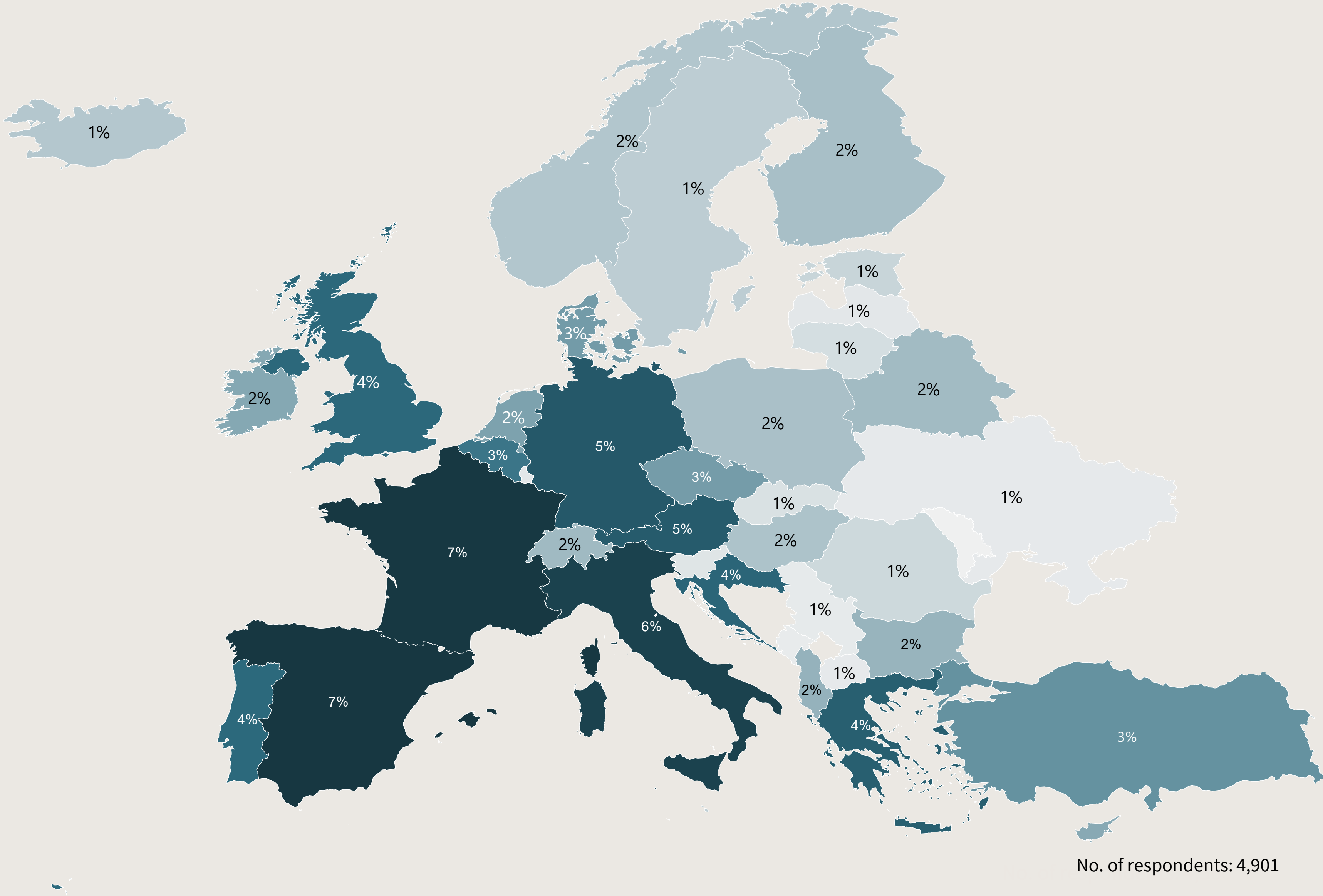
No. of respondents: 4,901

Preferred countries for the next intra-European trip

Horizon October ‘24-March ‘25

TOP 10 COUNTRIES

Spain	**6.9%**
France	**6.8%**
Italy	**6.2%**
Germany	**4.8%**
Austria	**4.7%**
Greece	**4.5%**
Croatia	**4.1%**
United Kingdom	**3.9%**
Portugal	**3.8%**
Belgium	**3.4%**

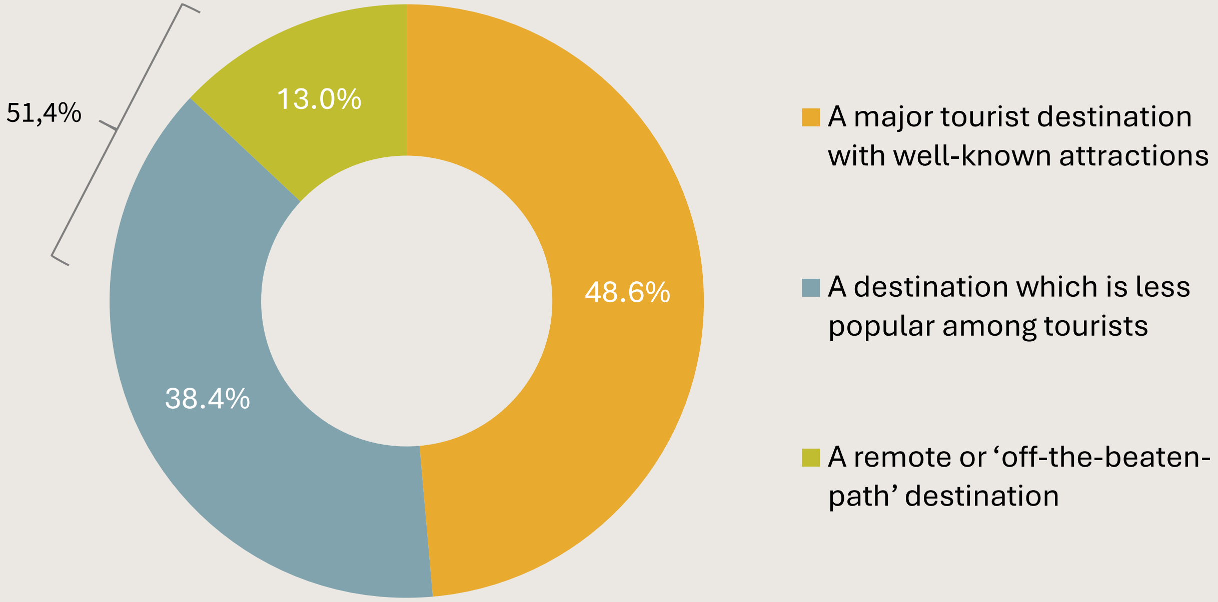


Q11. To which country(ies) do you plan to travel next?

No. of respondents: 4,901

Over half of Europeans plan to explore lesser-known destinations within the countries they will visit

Type of destination for the coming trip

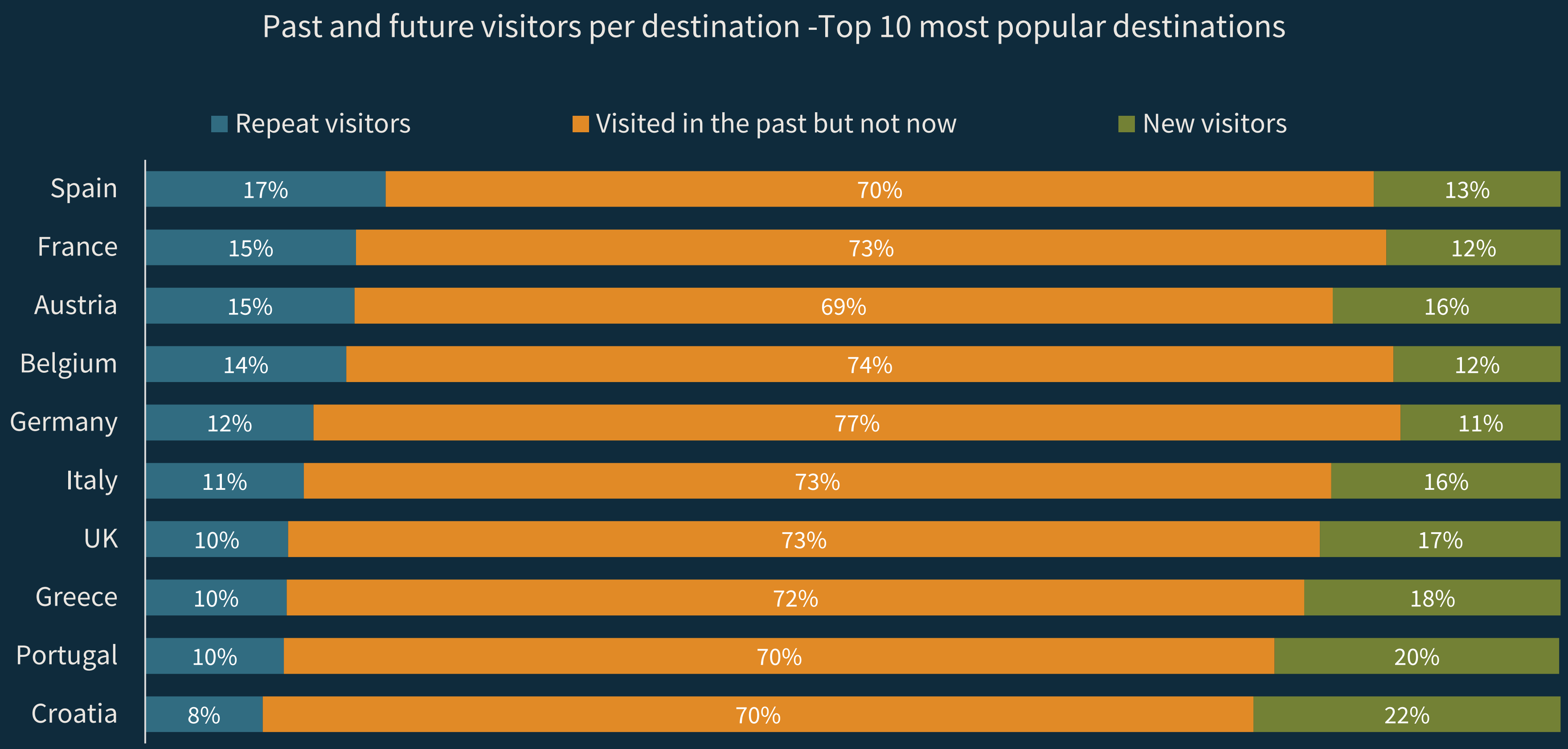


Q12. Thinking of the next country you intend to visit, in what type of destination, within it, do you plan to spend most of your time?

No. of respondents: 4,399

Top 5 markets favouring tourism hotspots		Top 5 markets favouring lesser-known or remote locations	
Italy	59%	Poland	64%
UK	56%	Austria	57%
Switzerland	48%	Netherlands	56%
France	48%	Germany	54%
Belgium	48%	Spain	53%

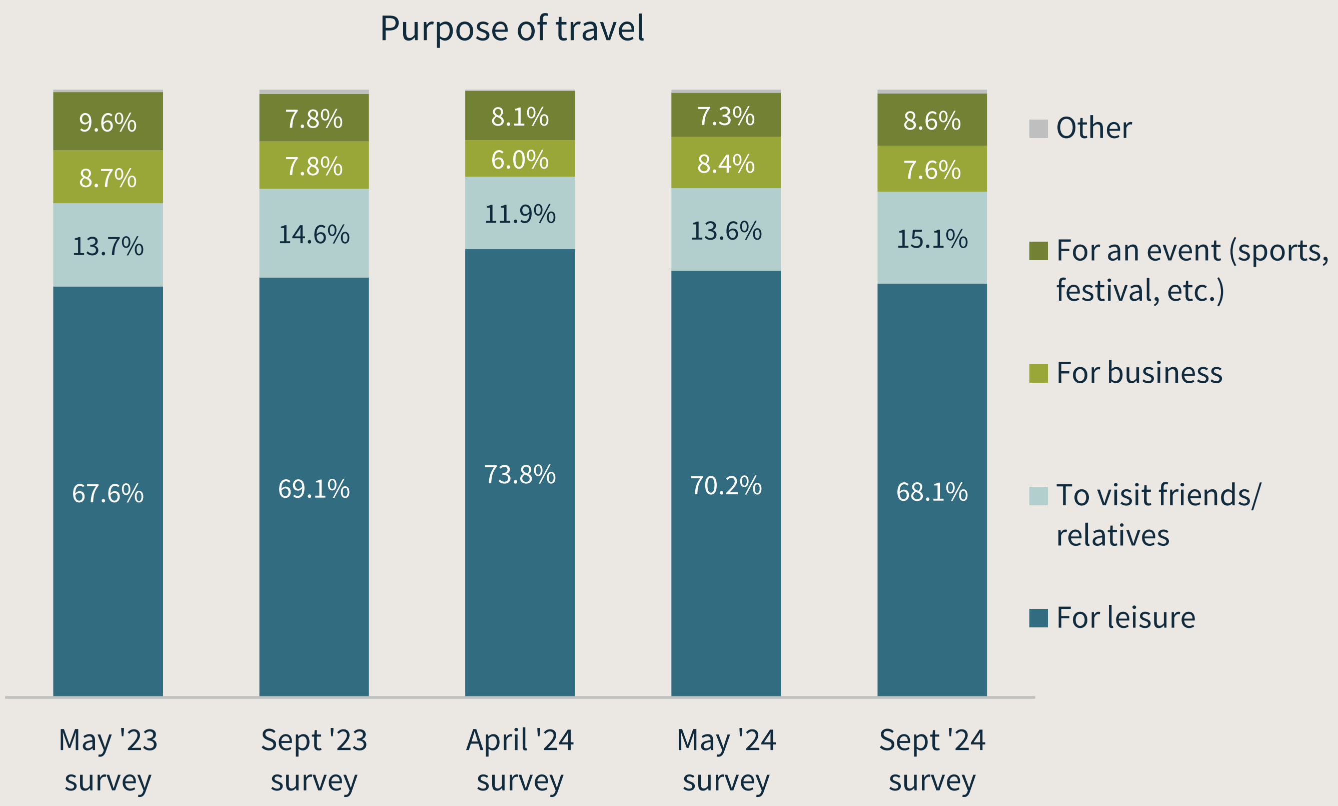
Croatia, Portugal, and Greece draw new travellers, while Spain, France, and Austria maintain interest among the repeat visitors



Q1. Which European countries have you visited in the past three years (2022-2023-24)?
Q11. 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. Total No. of cases: 7,428

68% of Europeans plan leisure trips in the next 6 months, while only 8% will travel for business



Q8. For what reason are you most likely to travel within Europe next?

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

No. of respondents: 4,399

Top 3 markets to take a leisure trip	Top 3 markets to take a business trip
Italy 79%	Switzerland 13%
UK 78%	Belgium 12% 5%*
France 77% 4%*	Austria 10%

Results for business trip per country are indicative due to small sample bases

As autumn arrives, culture & heritage and city break trips take the lead

Europeans' desire to enjoy nature, gastronomy and culture remains stable compared to September 2023

Preferred type of leisure trip in the next six months

Q16. What type of leisure trip within Europe are you most likely to undertake next?
Q5. Which of the following travel experiences will you look for during your next trip to Europe?

Preferred travel experiences in the next 6 months

No. of respondents: 4,399

Popular types of trips and experiences

Analysis of preferred types of leisure trip by age, length of stay, budget, types of experiences and preferred destinations

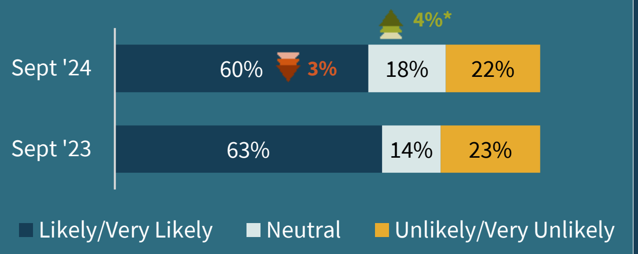
	Culture & Heritage	City Break	Sun & Beach	Nature & Outdoors
AGE GROUPS MOST INTERESTED IN THIS TYPE OF TRIP	**31%** >55 **22%** 35-44	**23%** >55 **22%** 25-34 & 35-44	**27%** >55 **20%** 25-34	**30%** >55 **22%** 35-44
MOST COMMON LENGTH OF STAY & BUDGET	**51%** 4-6 nights **28%** 500-1000 € **20%** up to 3 nights **20%** 1001-1500 €	**50%** 4-6 nights **34%** 500-1000 € **33%** up to 3 nights **22%** up to 500 €	**35%** 7-9 nights **26%** 500-1000 € **34%** 4-6 nights **24%** 1001-1500 €	**40%** 4-6 nights **28%** 500-1000 € **25%** 7-9 nights **20%** 1001-1500 €
TOP EXPERIENCES TO TRY	**21%** Learn about history **18%** Sightseeing **17%** Dive into local culture **15%** Gastronomic experiences	**18%** Sightseeing **16%** Gastronomic experiences **16%** Enjoy natural landscapes **16%** Dive into local culture	**18%** Enjoy natural landscapes **16%** Gastronomic experiences **14%** Dive into local culture **14%** Sightseeing	**25%** Enjoy natural landscapes **15%** Gastronomic experiences **13%** Dive into local culture **12%** Learn about history
TOP DESTINATIONS	**8%** France **7%** Italy **6%** Spain **5%** UK	**11%** France **8%** Italy **8%** Germany **5%** Spain	**15%** Spain **9%** Greece **6%** Italy **6%** Türkiye	**6%** Austria **5%** France **5%** Germany **5%** Croatia

No. of respondents: 4,399

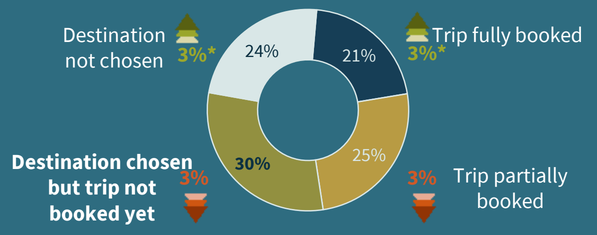
Austrians' travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



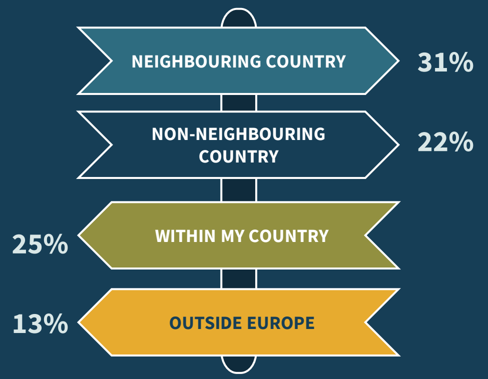
TRAVEL READINESS



POPULAR TRAVEL PERIODS

34%	October-November '24	3%*
26%	December '24-January '25	3%*
21%	February-March '25	5%*

WHERE TO?



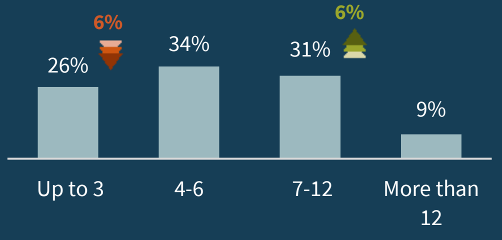
TRAVELLING WITH?

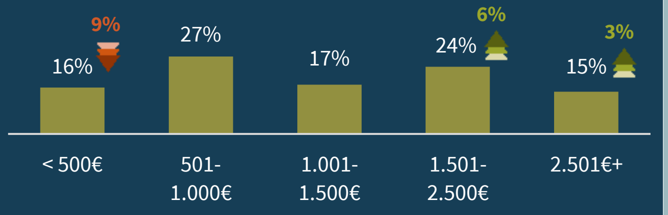
29%	28% 5%	14%
With family	With partner	Solo

TOP 3 TYPES OF TRIPS

16%	City Break	5%
16%	Wellness & Relaxation	
15%	Nature & Outdoors	

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Germany	8% 4%	4%
Italy	7%	4%
Croatia	5%	4%
Greece	5%	4%
France	4%	3%

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

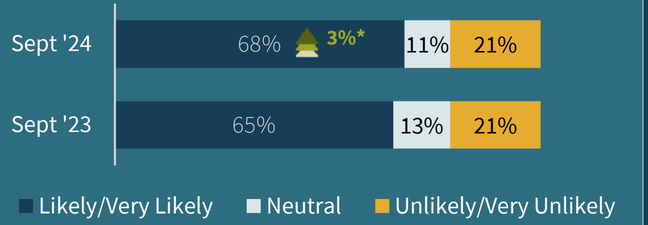
* Statistically significant difference vs a year ago (September 2023)

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

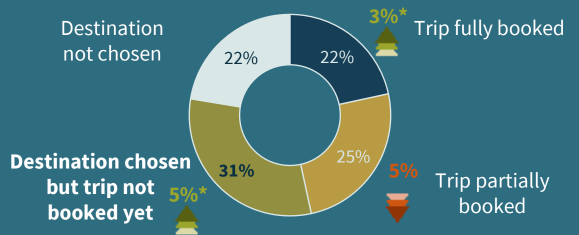
Belgians' travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



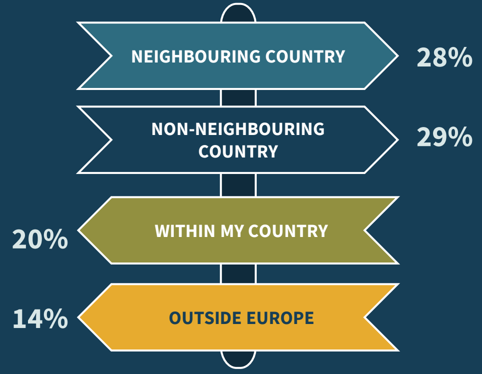
TRAVEL READINESS



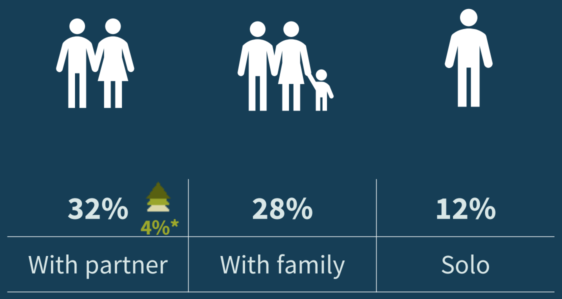
POPULAR TRAVEL PERIODS

32%	October-November '24
27%	December '24-January '25
19%	February-March '25

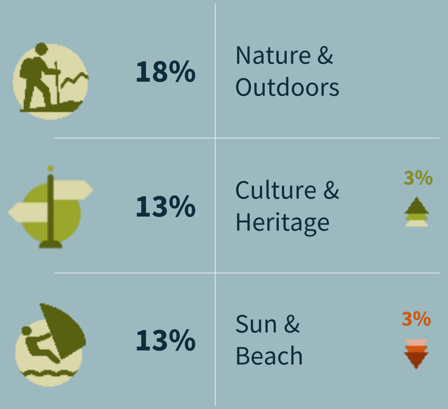
WHERE TO?



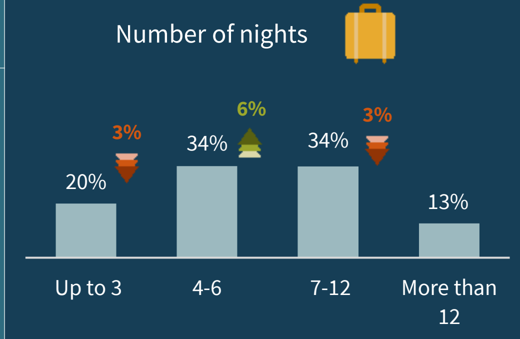
TRAVELLING WITH?

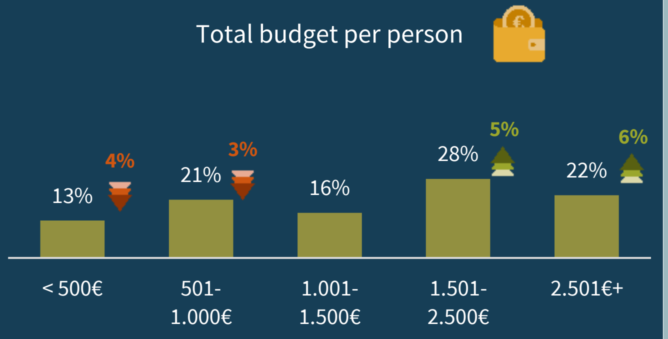


TOP 3 TYPES OF TRIPS



INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
France	12%	6%
Italy	7%	4%
Germany	5%	4%
Spain	5%	4%
Netherlands	5%	3%

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

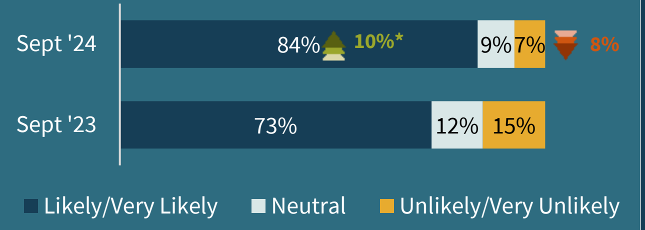
* Statistically significant difference vs a year ago (September 2023)

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

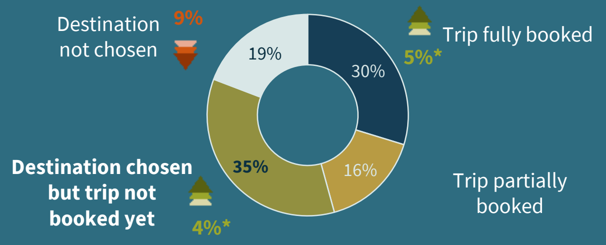
Britons' travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



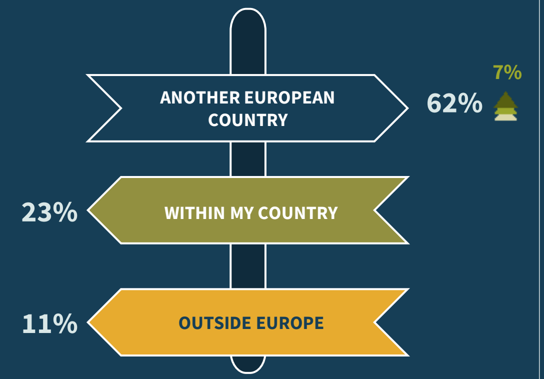
TRAVEL READINESS



POPULAR TRAVEL PERIODS

41%	October-November '24	9%*
27%	December '24-January '25	
26%	February-March '25	7%*

WHERE TO?



TRAVELLING WITH?

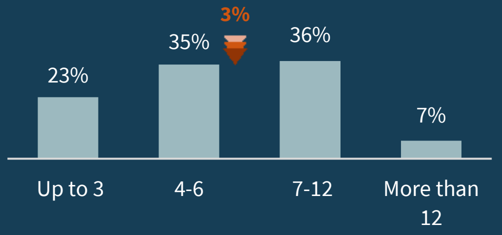
40%	33%	12%
With partner	With family	Solo

TOP 3 TYPES OF TRIPS

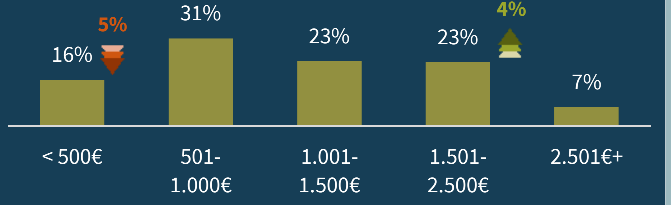
31%	City Break
24%	Sun & Beach
9%	Culture & Heritage

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Spain	14%	14%
France	9%	9%
Italy	8%	7%
Greece	7%	7%
Germany	6%	4%

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

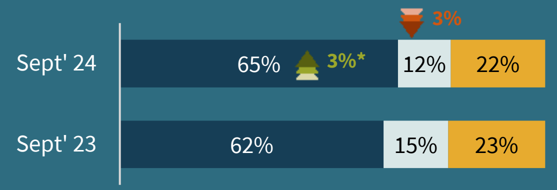
* Statistically significant difference vs a year ago (September 2023)

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

Dutch travel plans

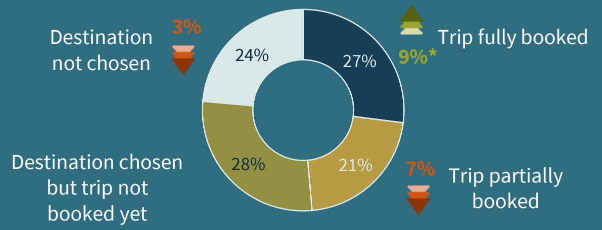
Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



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

TRAVEL READINESS



POPULAR TRAVEL PERIODS

33%	October-November ‘24 (5%*)
24%	December ‘24-January ‘25
23%	February-March ‘25

WHERE TO?

NEIGHBOURING COUNTRY	20%
NON-NEIGHBOURING COUNTRY	37%
WITHIN MY COUNTRY	19%
OUTSIDE EUROPE	13%

TRAVELLING WITH?

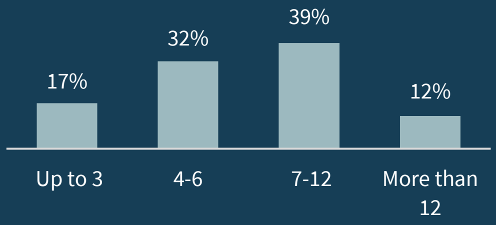
With partner	With family	Solo
30% (8%)	28%	15%

TOP 3 TYPES OF TRIPS

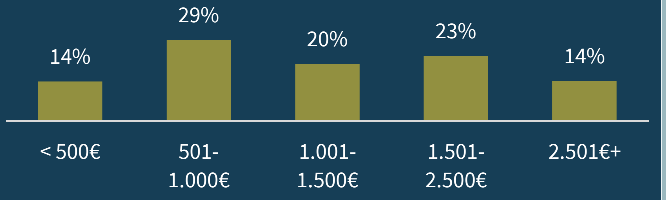
19%	Sun & Beach	4%
17%	City Break	
16%	Nature & Outdoors	5%

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Spain	7%	3%
Germany	7% (3%)	6%
Belgium	6%	6%
Austria	6%	4%
UK	6%	2%

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

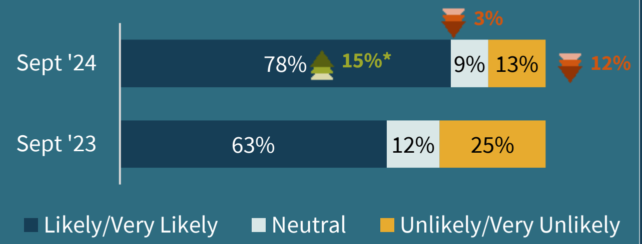
* Statistically significant difference vs a year ago (September 2023)

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

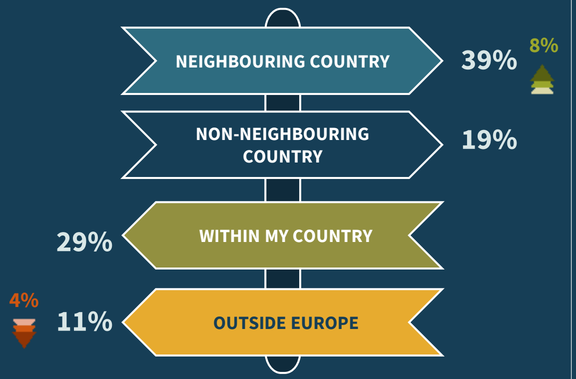
French travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



WHERE TO?



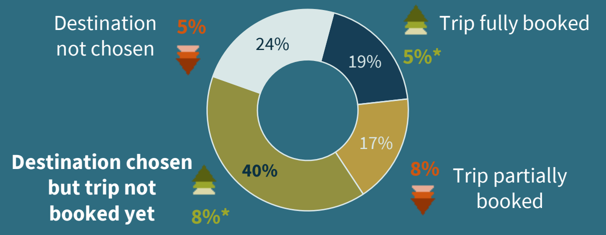
TRAVELLING WITH?

35%	34% 5%	10%
With partner	With family	Solo

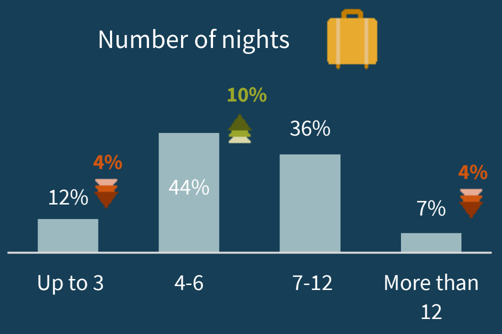
TOP 3 TYPES OF TRIPS

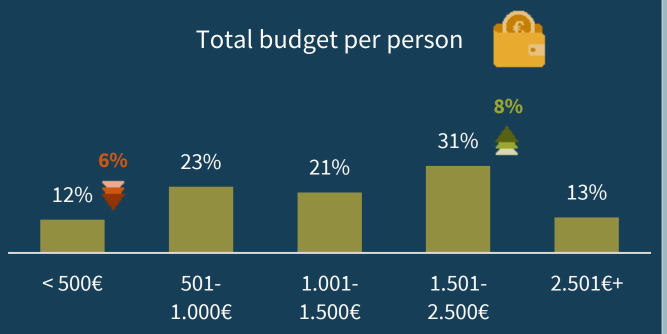
24%	Culture & Heritage
18%	Nature & Outdoors
14%	Sun & Beach

TRAVEL READINESS



INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Italy	8%	7%
Spain	7%	8%
Croatia	7%	5%
Greece	5%	4%
UK	5%	4%

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

POPULAR TRAVEL PERIODS

26%	October-November '24	4%*
32%	December '24-January '25	6%*
25%	February-March '25	4%

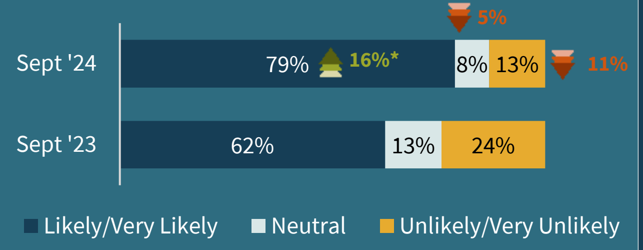
* Statistically significant difference vs a year ago (September 2023)

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

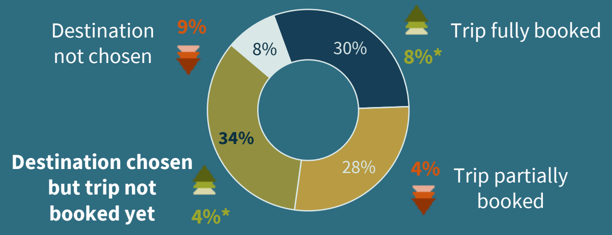
Germans' travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



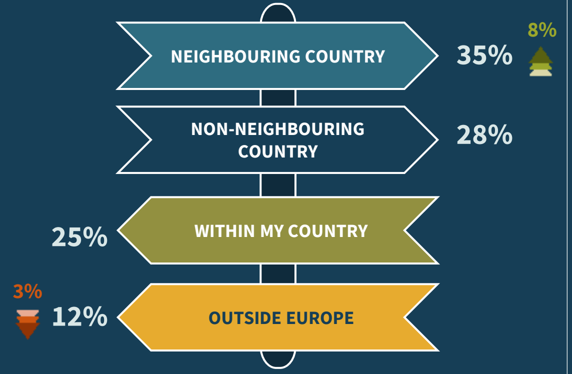
TRAVEL READINESS



POPULAR TRAVEL PERIODS

47%	October-November '24	13%*
33%	December '24-January '25	6%*
17%	February-March '25	5%

WHERE TO?



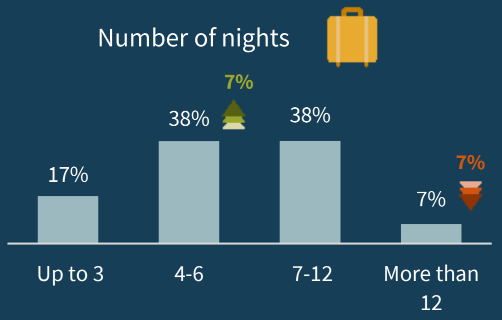
TRAVELLING WITH?

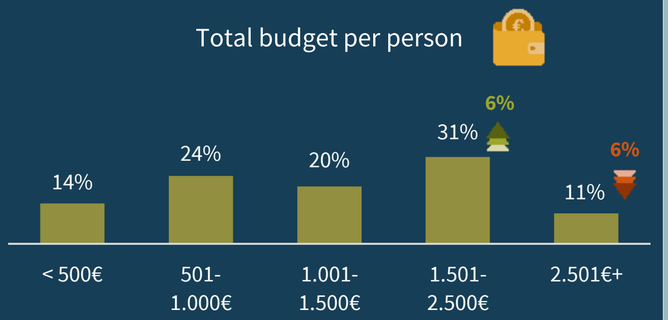
With partner	With family	Solo
38% (8%)	35% (11%)	10% (6%)

TOP 3 TYPES OF TRIPS

20%	Sun & Beach	5%
14%	Nature & Outdoors	
13%	Wellness & Relaxation	3%

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Austria	10% 4%*	8%
Spain	7%	5%
Italy	6%	6%
Türkiye	5%	4%
France	5%	7%

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

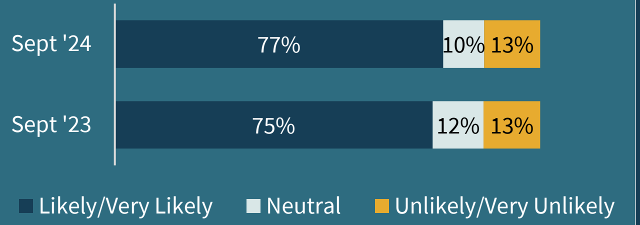
* Statistically significant difference vs a year ago (September 2023)

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

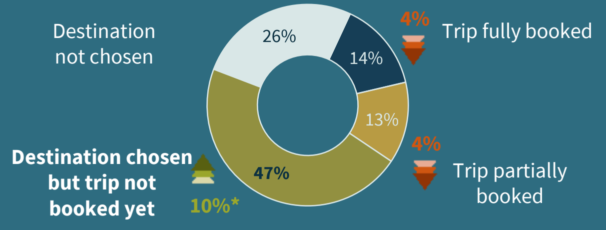
Italians’ travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



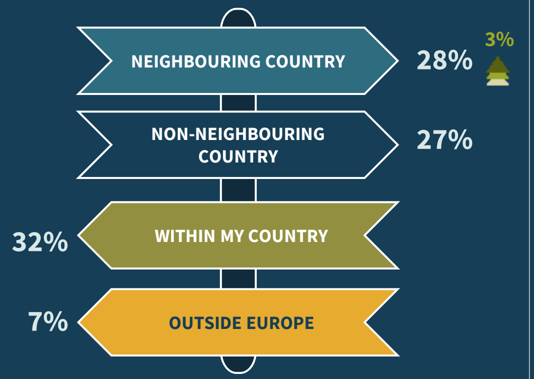
TRAVEL READINESS



POPULAR TRAVEL PERIODS

27%	October-November ‘24	3%
35%	December ‘24-January ‘25	3%*
21%	February-March ‘25	

WHERE TO?



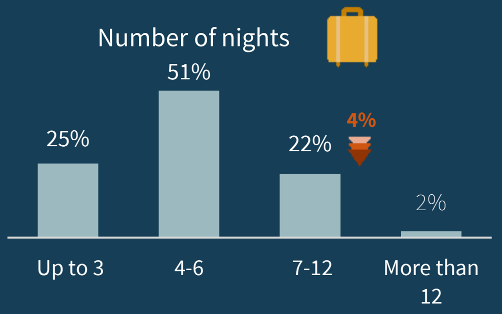
TRAVELLING WITH?

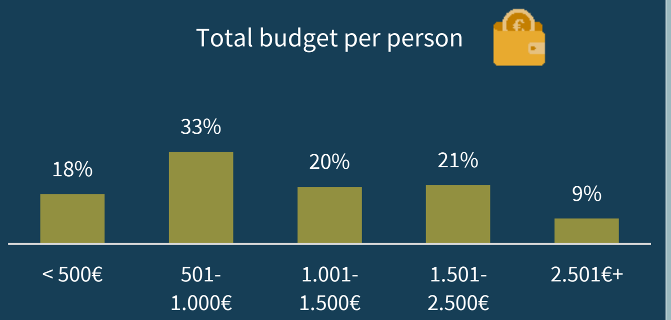
41% (4%)	34%	7%
With partner	With family	Solo

TOP 3 TYPES OF TRIPS

41%	Culture & Heritage	5%
10%	Nature & Outdoors	
8%	Sun & Beach	

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
France	12%	10%
Spain	9%	8%
UK	6%	5%
Germany	6%	6%
Austria	5%	4%

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

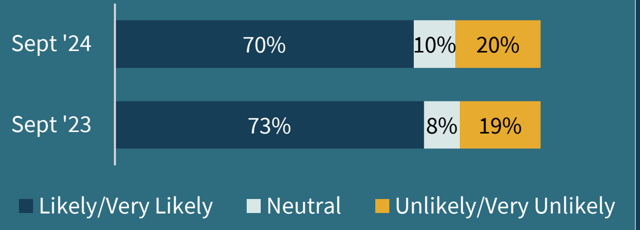
* Statistically significant difference vs a year ago (September 2023)

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

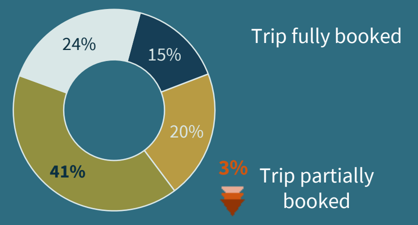
Poles' travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



TRAVEL READINESS



POPULAR TRAVEL PERIODS

29%	October-November '24	6%
24%	December '24-January '25	
23%	February-March '25	3%*

WHERE TO?

NEIGHBOURING COUNTRY	24%
NON-NEIGHBOURING COUNTRY	27%
WITHIN MY COUNTRY	30%
OUTSIDE EUROPE	12%

TRAVELLING WITH?

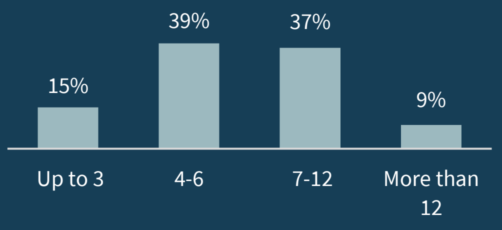
37%	28% (4%)	11%
With family	With partner	Solo

TOP 3 TYPES OF TRIPS

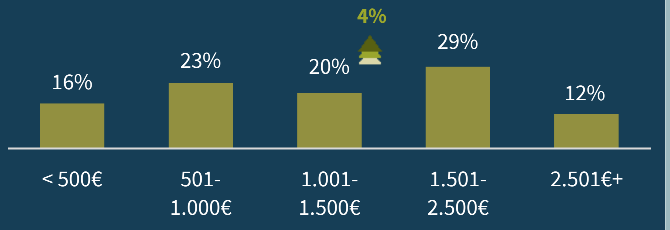
19%	City Break
16%	Culture & Heritage
11%	Coast & Sea

INTENDED LENGTH OF STAY AND BUDGET

Number of nights



Total budget per person



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Italy	7%	5%
Germany	6%	5%
Spain	6%	3%
Czech Republic	5%	5%
Croatia	5%	5%

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

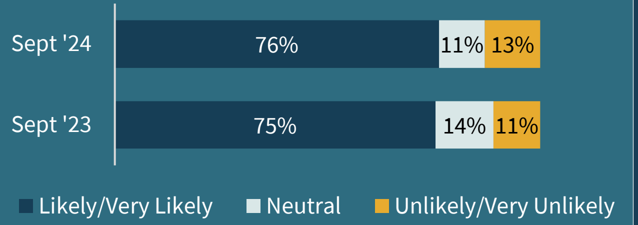
* Statistically significant difference vs a year ago (September 2023)

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

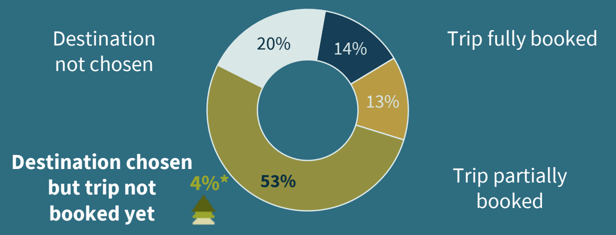
Spaniards' travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL



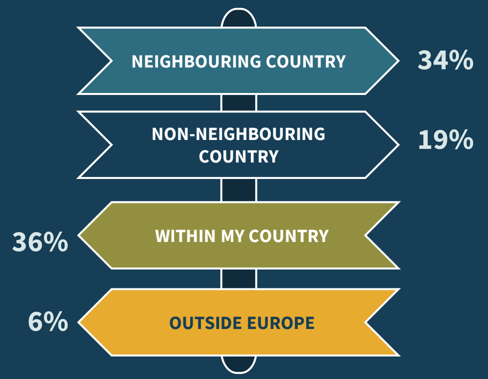
TRAVEL READINESS



POPULAR TRAVEL PERIODS

28%	October-November '24	5%
33%	December '24-January '25	
20%	February-March '25	5%*

WHERE TO?



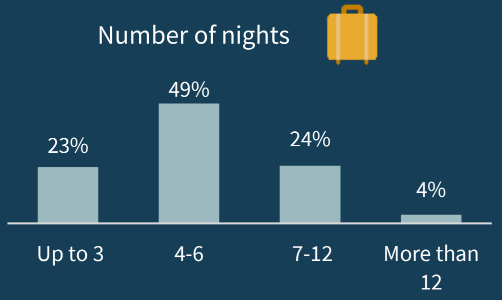
TRAVELLING WITH?

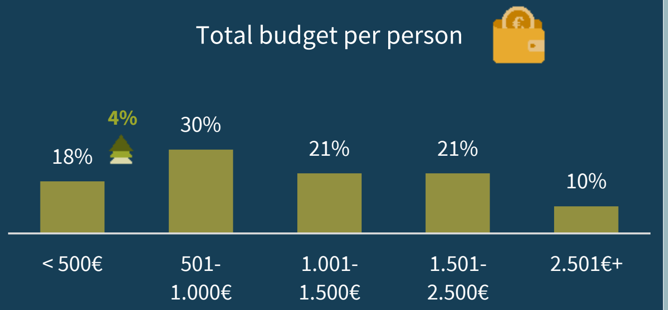
With partner	With family	Solo
44%	33% (5%)	7% (6%)

TOP 3 TYPES OF TRIPS

33%	City Break	6%
25%	Culture & Heritage	5%
10%	Nature & Outdoors	

INTENDED LENGTH OF STAY AND BUDGET





TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
France	13%	15%
Italy	12%	12%
Portugal	9% 3%*	10%
UK	7%	4%
Germany	5% 4%	6%

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

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

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

Swiss travel plans

Travel horizon: October 2024-March 2025

INTENTION TO TRAVEL

	Likely/Very Likely	Neutral	Unlikely/Very Unlikely	
Sept '24	63%	12%	25%	3%*
Sept '23	64%	15%	22%	

Likely/Very Likely · Neutral · Unlikely/Very Unlikely

TRAVEL READINESS

- Trip fully booked: 24%
- Trip partially booked: 33% (5%*)
- Destination chosen but trip not booked yet: 28%
- Destination not chosen: 15% (8%)

POPULAR TRAVEL PERIODS

39%	October-November ‘24	4%*
30%	December ‘24-January ‘25	
18%	February-March ‘25	

WHERE TO?

- NEIGHBOURING COUNTRY: 29% (6%)
- NON-NEIGHBOURING COUNTRY: 27%
- WITHIN MY COUNTRY: 22% (4%)
- OUTSIDE EUROPE: 14%

TRAVELLING WITH?

30%	26%	16%
With family	With partner	Solo

TOP 3 TYPES OF TRIPS

13%	City Break
12%	Sun & Beach
11%	Wellness & Relaxation

INTENDED LENGTH OF STAY AND BUDGET

Number of nights

Up to 3	4-6	7-12	More than 12
17% (8%)	39% (3%)	32%	12%

Total budget per person

< 500€	501-1.000€	1.001-1.500€	1.501-2.500€	2.501€+
14%	19% (3%)	17%	24% (4%)	26% (8%)

TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Belgium	6% 3%*	4%
France	6%	4%
Austria	5%	4%
Germany	5%	4%
Italy	5% 6%	3%

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

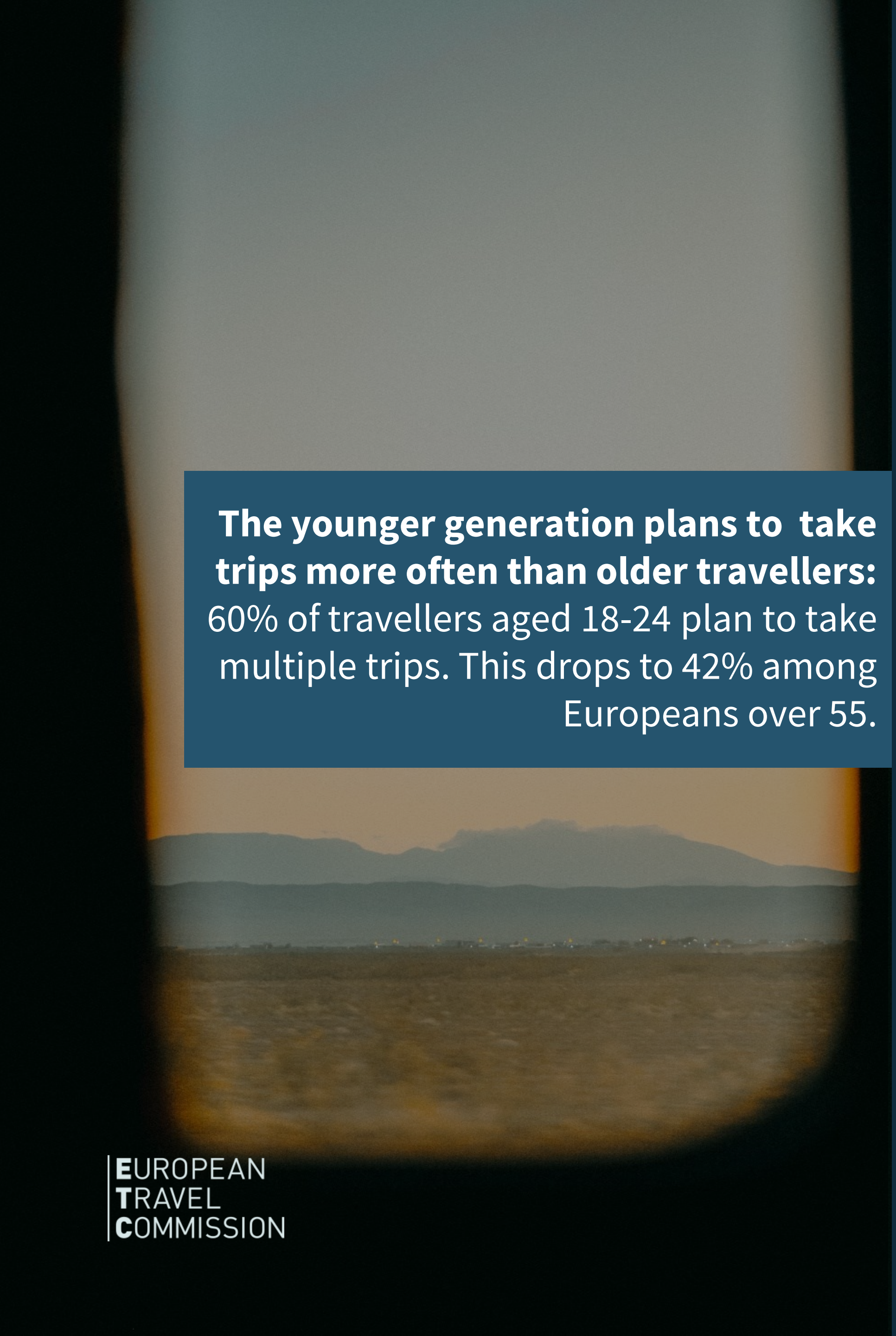
* Statistically significant difference vs a year ago (September 2023)

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

Planning the details

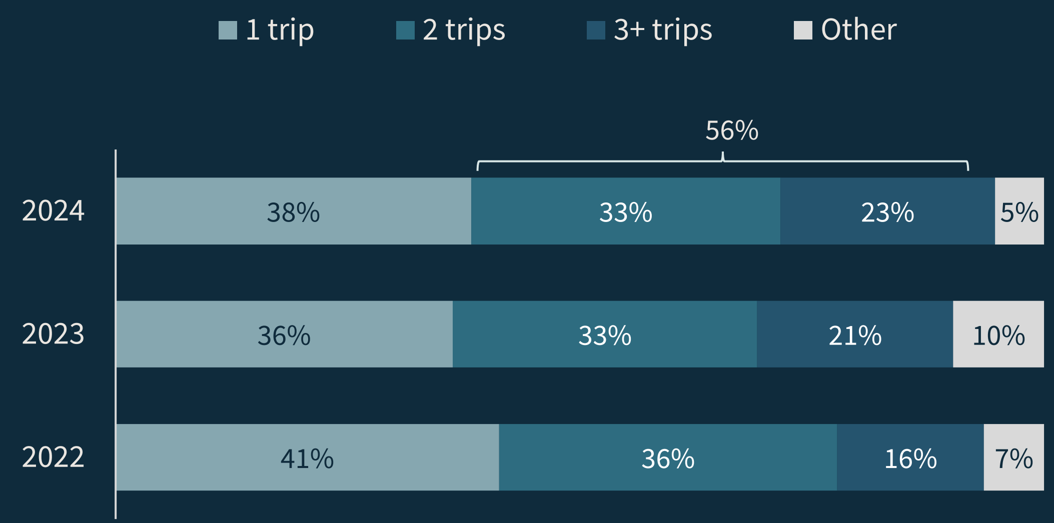
02

56% of Europeans plan to take multiple trips in the coming 6 months



The younger generation plans to take trips more often than older travellers: 60% of travellers aged 18-24 plan to take multiple trips. This drops to 42% among Europeans over 55.

Number of intended trips within Europe in the next six months



Q7. How many trips do you plan to take in the next 6 months, within Europe?

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

No. of respondents: 4,399

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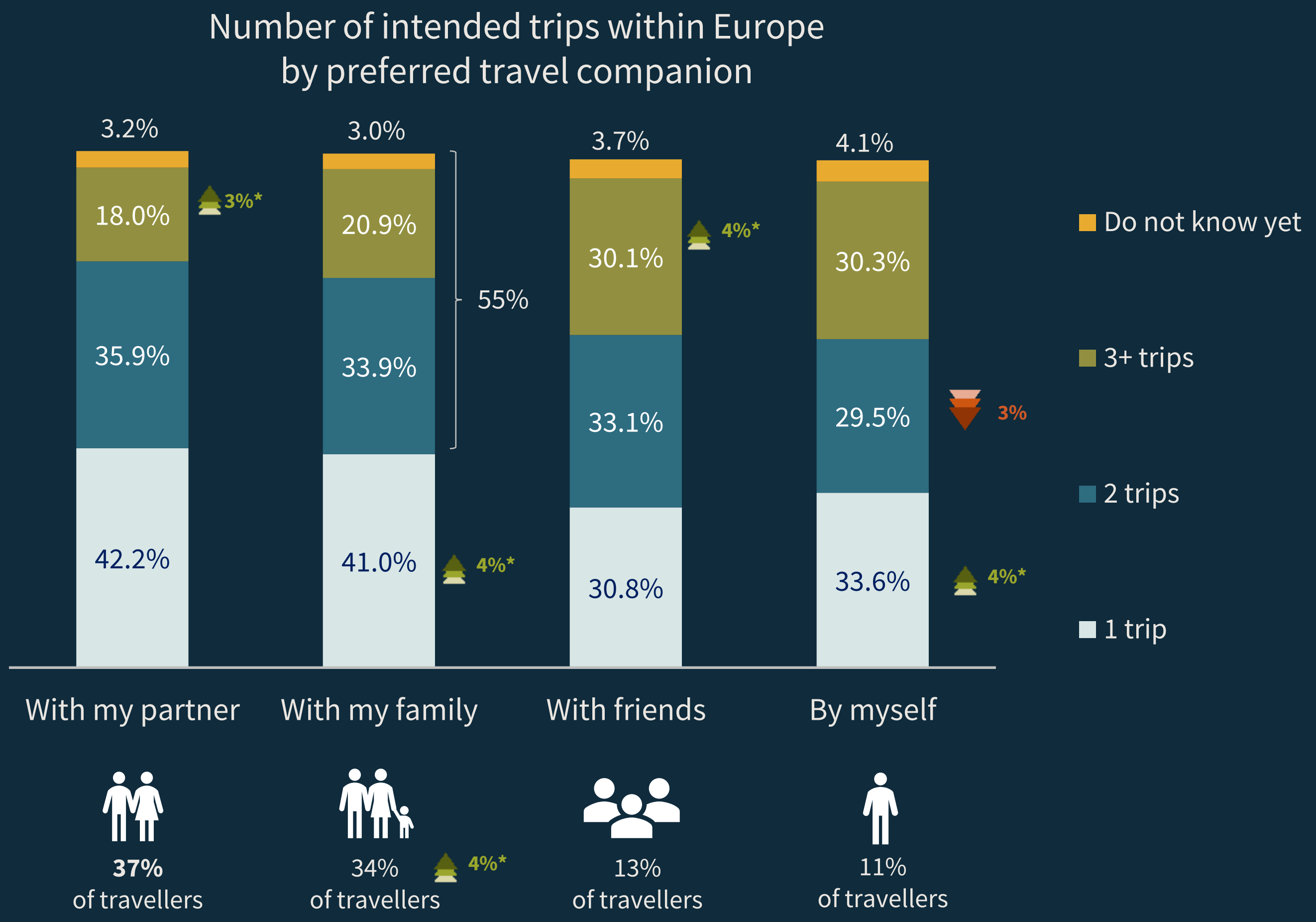
More Europeans plan to travel with family, and 55% of families are planning to take multiple trips

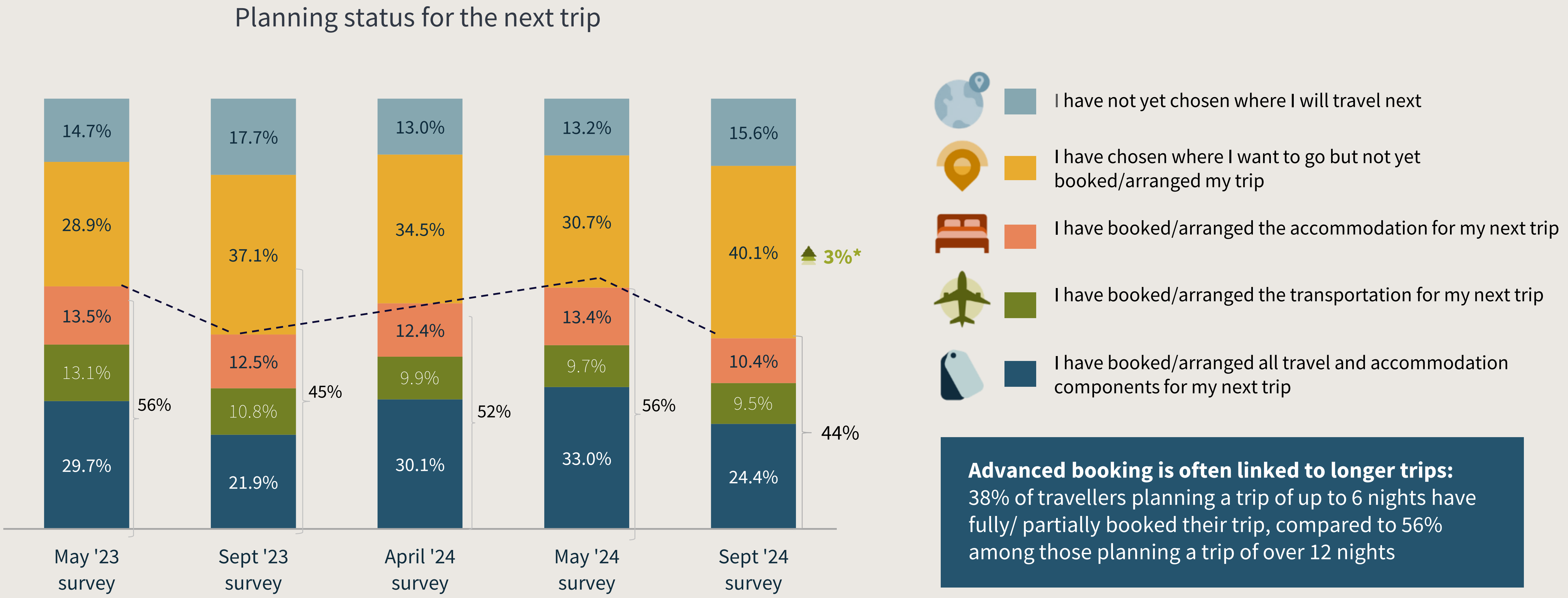


* Statistically significant difference vs a year ago (September 2023)

Q7. How many trips do you plan to take in the next 6 months, within Europe?

No. of respondents: 4,399

44% of Europeans have fully/ partially booked their trip – 12% below this year's pre-summer booking rush



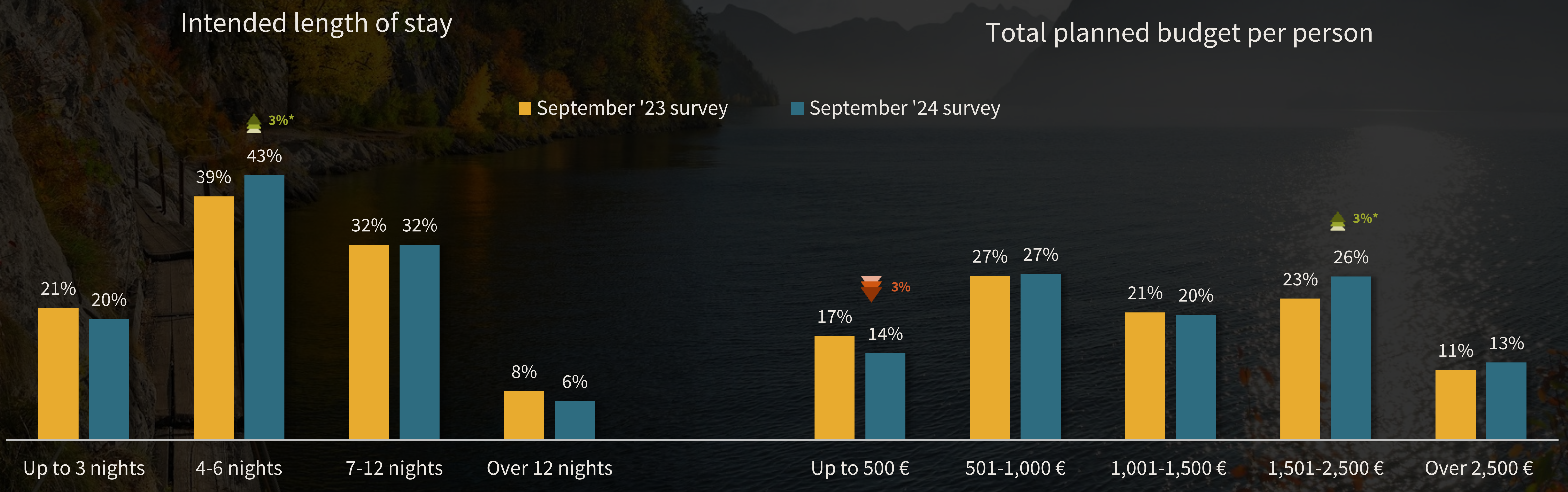
Advanced booking is often linked to longer trips: 38% of travellers planning a trip of up to 6 nights have fully/ partially booked their trip, compared to 56% among those planning a trip of over 12 nights

Q19. Please select a response which best describes the planning for your next trip

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

No. of respondents: 4,399

A growing number of Europeans are planning trips of 4-6 nights (+3%) and the share of travellers planning to spend over 1,500 euros rises by 5%



Q17. What would be the length of your next overnight trip?
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

* Statistically significant difference vs a year ago (September 2023)
No. of respondents: 4,399

Budget allocation by length of trip

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

	< 3 nights	4-6 nights	7-12 nights
< 500 €	40%	10%	10%
501 - 1,000 €	35%	32%	33%
1,001 - 1,500 €	11%	23%	43%
1,501 - 2,500 €	10%	27%	71%

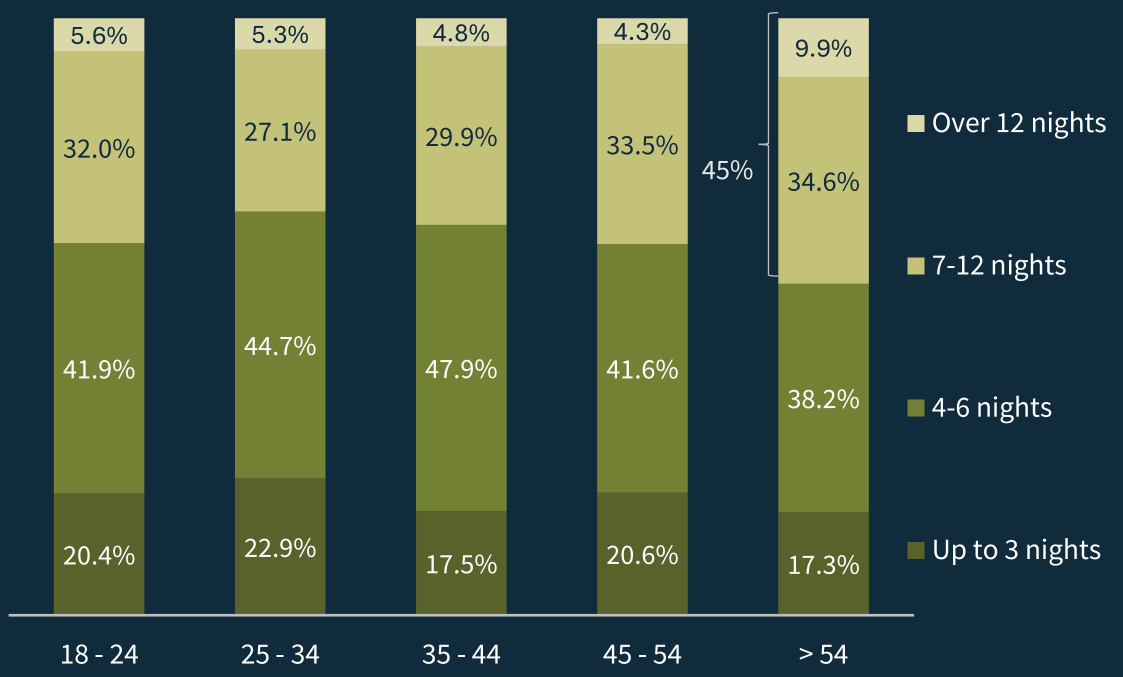
No. of respondents: 4,399

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

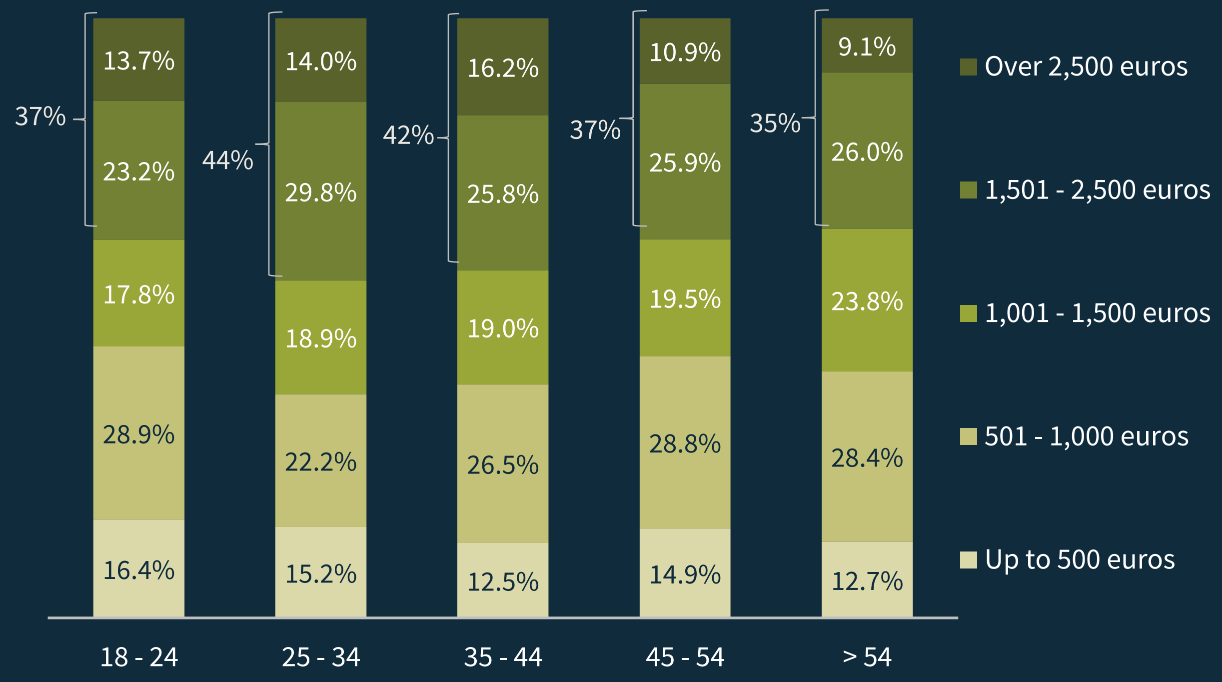
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

Mature travellers plan longer trips, while the younger ones intend to spend the most

Intended length of stay



Projected budget



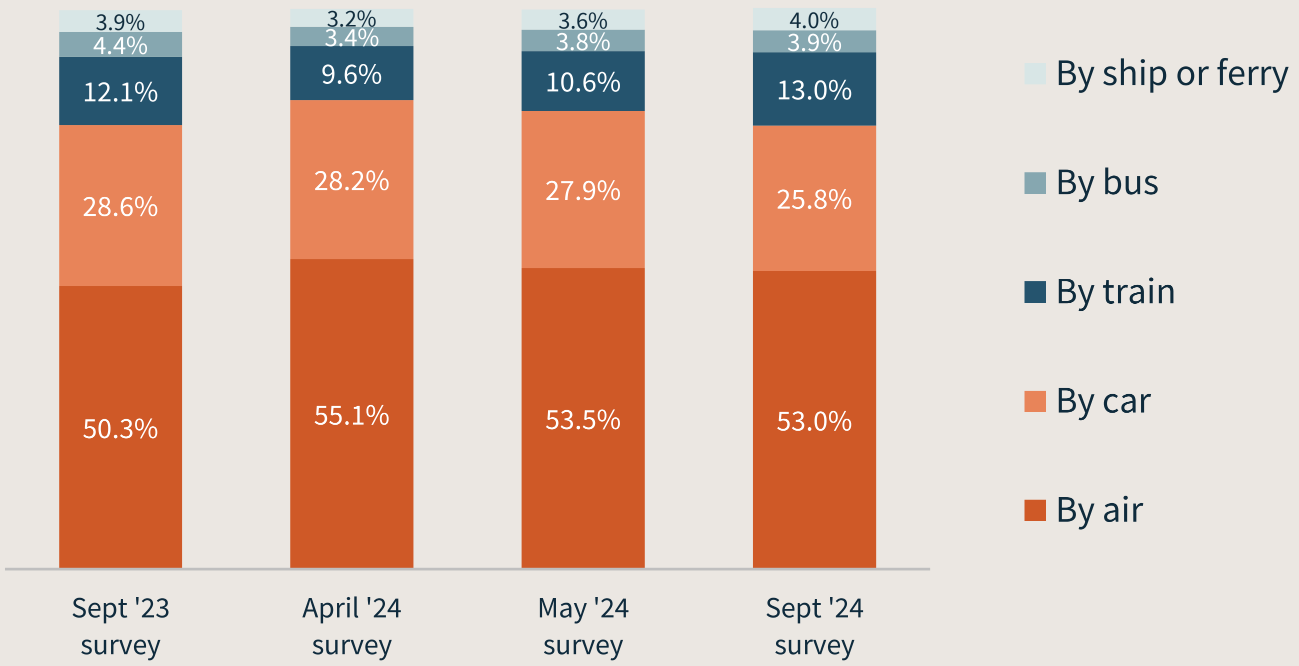
The budget is per person per trip, including accommodation, transportation and travel activities

Q17. What would be the length of your next overnight trip?
Q18. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 4,399

Air travel remains in high demand, while car travel drops to its lowest-recorded level (26%)

Preferred modes of transport for intra-European travel



Top driving markets		Top markets to take a plane	
Austria	42%	UK	74%
Germany	38%	Spain	71%
Netherlands	35%	Italy	65%

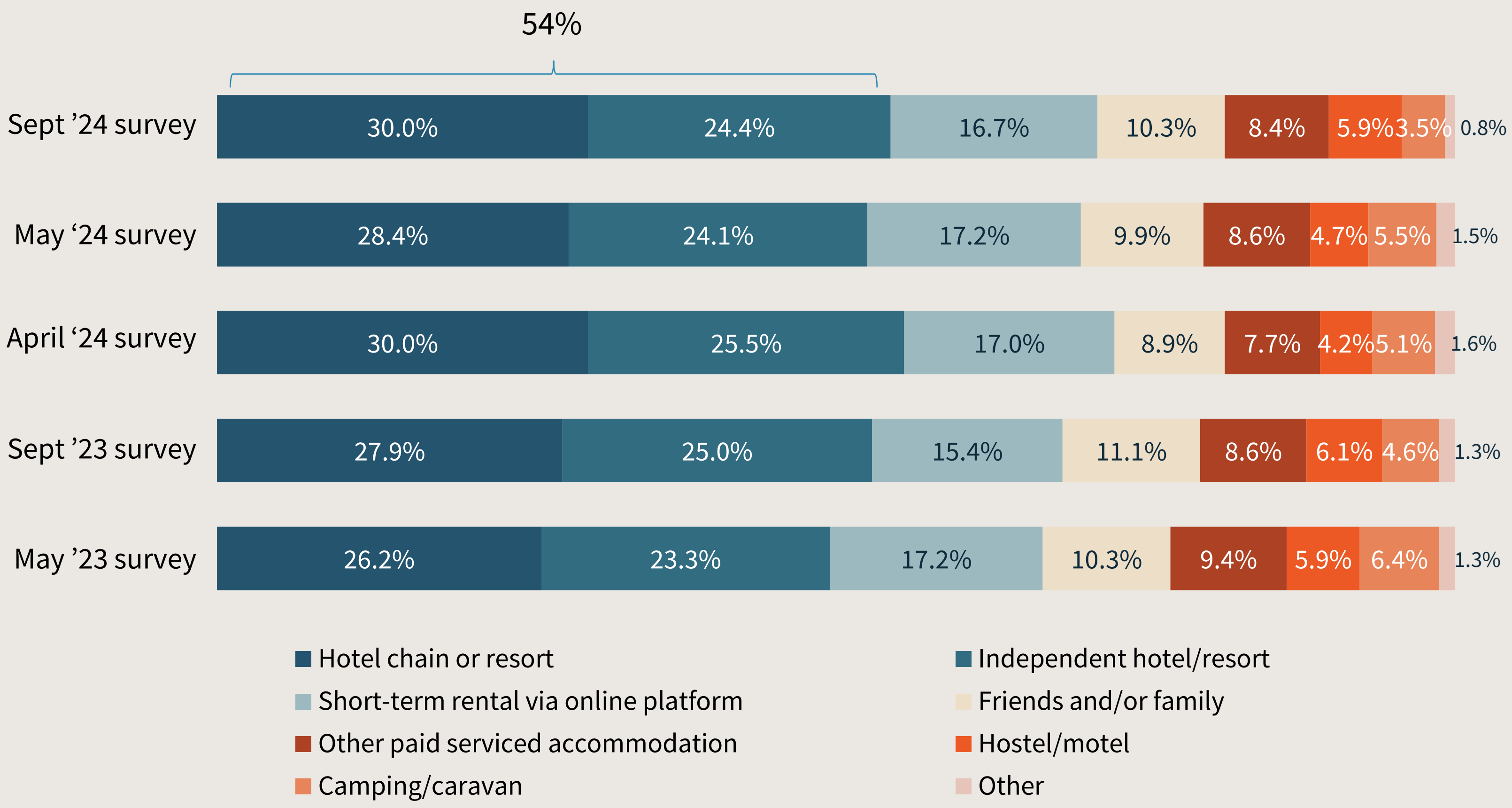
Q13. Which of the following modes of transport would you most consider using during your next trip within Europe?

Statistically significant difference vs a year ago (September 2023)

No. of respondents: 4,399

54% of Europeans prefer hotels, while short-term rentals maintain steady demand at 17%

Preferred type of accommodation



Q14. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

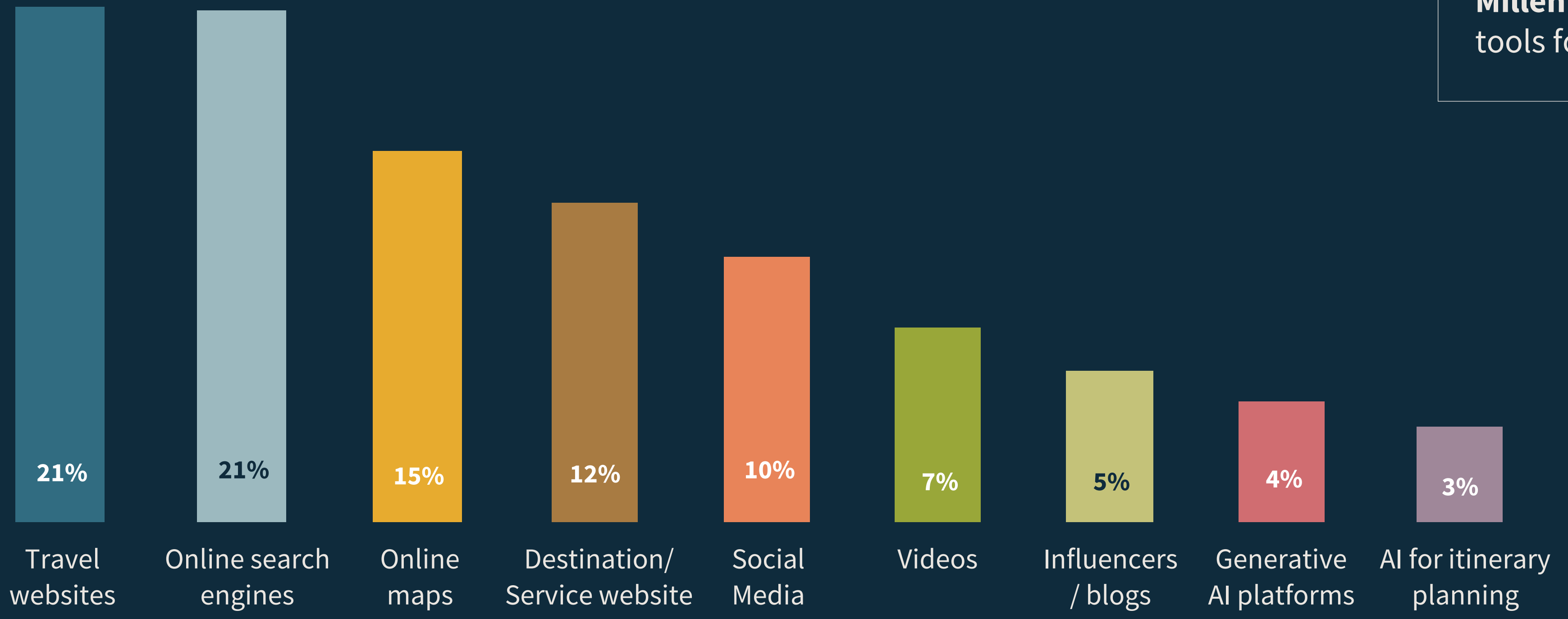
* Statistically significant difference vs a year ago (September 2023)

Of those travelling to visit friends and relatives, 55% will choose paid accommodation and 39% will stay with friends/ family.

No. of respondents: 4,508

Travel websites and search engines are top digital tools for Europeans planning trips

Preferred digital tools for planning the next trip



AI for trip planning appeals more to Millennials: 53% of travellers using AI tools for trip planning are aged 25-44.

Q20. Which digital tools have you used (or will use) to plan your trip within Europe in the next 6 months?

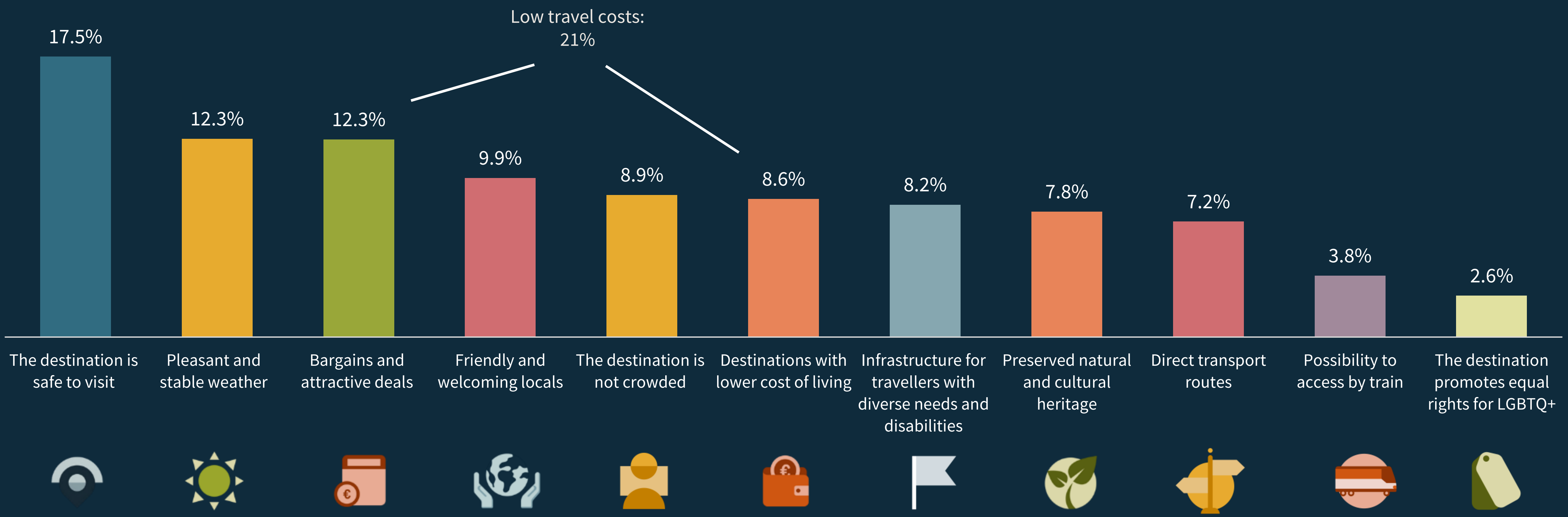
No. of respondents: 4,399

Travel considerations

03

Destination safety is crucial for 18% of Europeans, while 21% prioritise bargains and costs at destinations

Europeans’ top criteria in choosing a travel destination



Q4 What criteria will play the most important role in choosing your next holiday destination?
* This question was changed from W18 onwards

No. of respondents: 6,001

What do European travellers worry about?

Concerns about travel price inflation decreased (-3%) for the third straight wave

18.8% 3%
Rise in the overall cost of my trip due to inflation

14.8%
Economic situation and personal finances

13.2%
The ongoing conflict between Russia and Ukraine

9.8% 4%
Extreme weather events

9.2%
Too many visitors at the destinations I want to visit

8.8%
Disruptions in transport options due to strikes or under-staffing

8.6%
Potential impacts on travel safety due to tensions in the Middle East

6.4%
Booking and cancellation policies (refunds, etc.)

5.2%
The environmental footprint of my travel

5.0%
Demonstrations and protests against tourism

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

Q3. What currently concerns you the most about travelling within Europe?

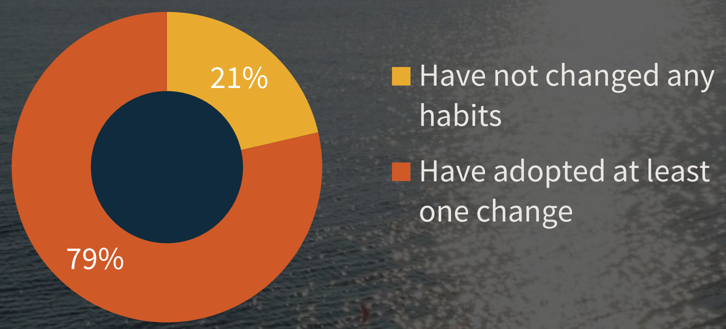
No. of respondents: 6,001

Europeans are adjusting their travel habits according to climate change

As autumn arrives, concerns about extreme temperatures cool down, and travellers focus more on checking weather forecasts.

Most popular changes of habits due to climate change

Europeans who changed their behaviours due to climate change

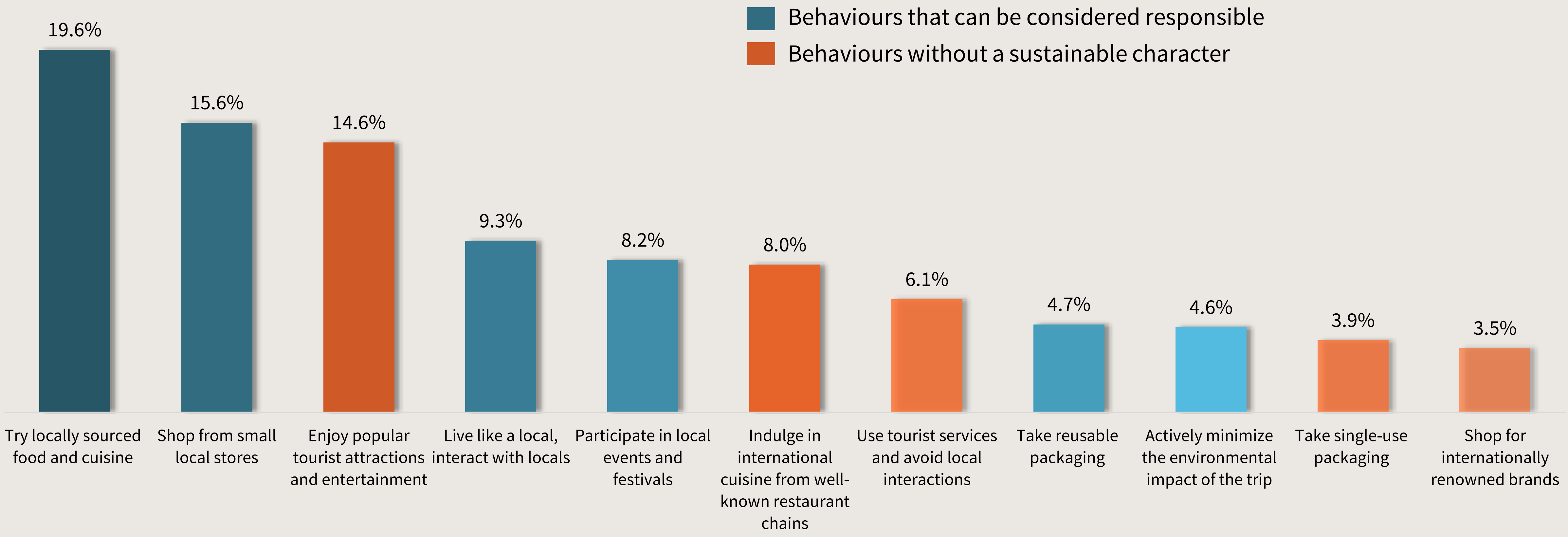


Travel habits of older Europeans tend to be less affected by the climate: 36% of Europeans aged over 55 have not changed their habits due to climate change, vs. 12% among travellers aged 18-24

Q21. How has the changing climate (heavy rains, heatwaves, wildfires, lack of snow, etc.) have been influencing your travel habits?

No. of respondents: 6,001

Projected travel behaviours of Europeans for their next holiday



Q22. Which of the following actions are you most likely to take during your next trip in Europe?

No. of respondents: 6,001

Methodology

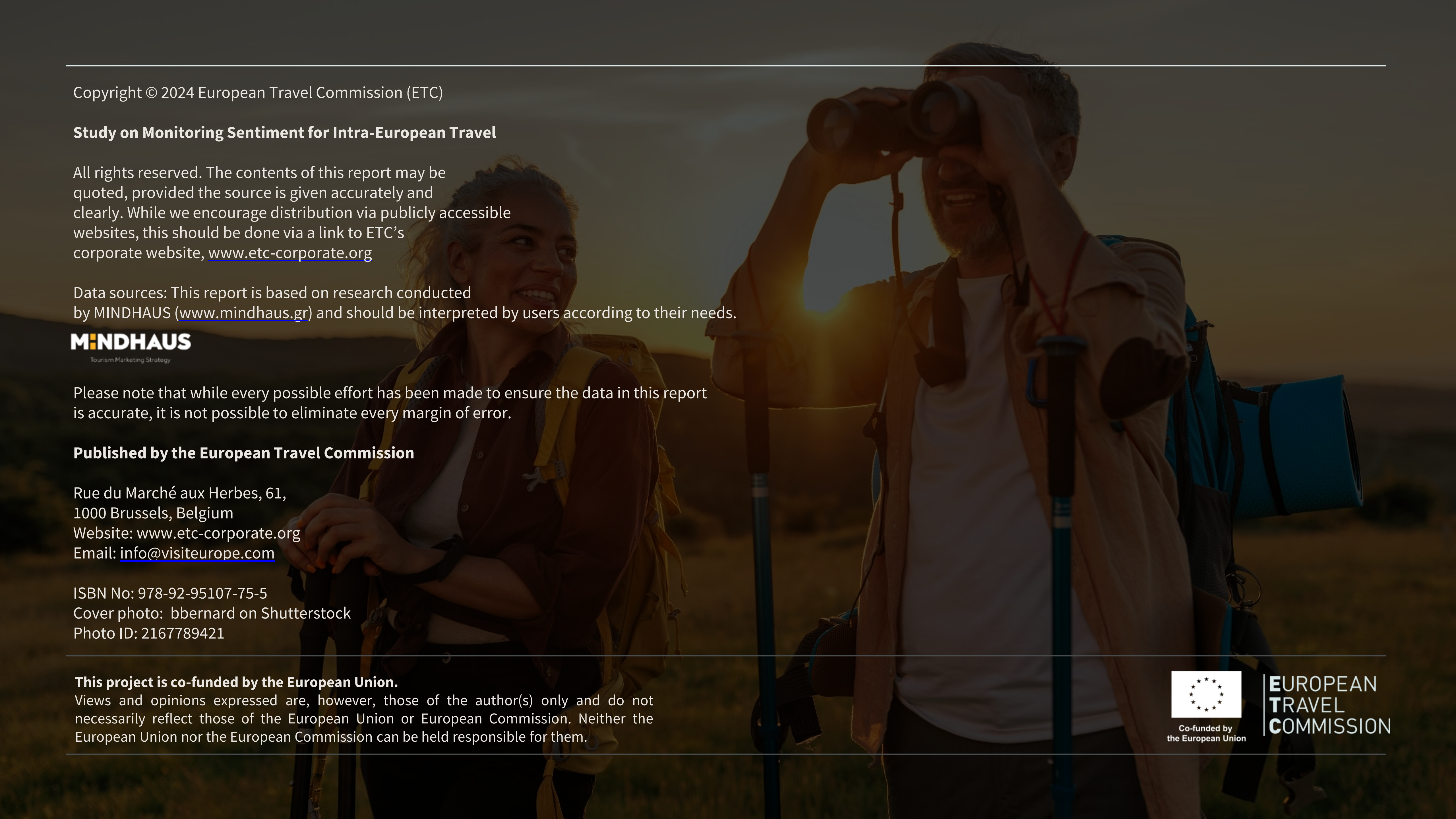
Methodology

- 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 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 / **Wave 19**: 25 May-7 June 2024; sample = 5,955 / **Wave 20**: 07-23 September 2024, sample = 6,001
  - **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)
- 48% of the Wave 20 survey respondents are male, and 52% are female. Sample size and age groups are listed below:

Age	Country										Total
	UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
18 - 24	88	70	44	104	96	92	56	85	125	129	**889**
25 - 34	136	112	73	114	128	152	106	125	112	180	**1,238**
35 - 44	126	134	103	109	140	150	120	103	109	86	**1,180**
45 - 54	138	168	105	72	146	168	92	75	82	66	**1,112**
≥55	262	266	175	101	240	188	126	112	73	39	**1,582**
Total	**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**501**	**500**	**6,001**

- **European regions:**
  - Southern/Mediterranean Europe: France, Croatia, Cyprus, Greece, Italy, Malta, Monaco, Montenegro, Portugal, San-Marino, Slovenia, Spain, Türkiye.
  - Western Europe: Austria, Belgium, Germany, Luxembourg, Netherlands, Switzerland
  - Northern Europe: Denmark, Finland, Iceland, Ireland, Norway, Sweden, the UK
  - Central Europe: Czech Republic, Hungary, Poland, Slovakia

Albania, Bosnia-Herzegovina, North Macedonia, Belarus and Moldova are excluded from the regional analysis for comparability reasons since they were introduced in 2024



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 eliminate every margin of error.

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