2022

Portrait *of* European Travellers™

MMGY Travel Intelligence

Methodology

MMGY Global conducted a survey of European travellers to learn about their travel behaviours, including travel spend, destination preferences, post-pandemic travel behaviour, sources used during travel planning, motivators for travelling internationally, flight preferences and attitudes toward safety, amongst other topics.

In order to qualify for the survey, respondents had to:

- Be aged 18 or older
- Intend to travel internationally for leisure within the next 12 months (within or outside Europe)

An online survey was conducted from 10 Oct. through 19 Oct. 2022 and received a total of 4,019 responses. Respondents were selected randomly and participated in a 20-minute online survey. The sample has been weighted based on age and gender.

Country of Residence	# of Respondents
France	800
Germany	800
Italy	800
Spain	805
U.K.	814

International Travel Outlook

MMGY Travel Intelligence

INTERNATIONAL TRAVEL OUTLOOK

Whilst these travellers are most concerned about the rising cost of travel when planning international holidays, it doesn't appear to be deterring their international travel plans.

When viewing this report, it is important to keep in mind that these results are amongst travellers who have indicated that they plan to travel internationally (inside or outside of Europe) during the next 12 months.

In October of 2022, these travellers reported an intent to take 2.3 international holidays during the next 12 months and spend an average of $3,975 during that time. This anticipated spend is similar to their pre-pandemic average annual spend.

When planning international travel, these travellers' biggest concerns are related to the costs of travel, the economy and concerns of personal safety due to violence/unrest, whilst COVID-19 ranks at the bottom of this list. Overall the European traveller is not as concerned about COVID-19 when travelling internationally, although some groups are more impacted by it than others, including travellers from Spain, Millennials and those making over $125K, with many of these travellers indicating they have changed travel behaviours because of it. Despite their concerns, these travellers are still planning to travel internationally. These trips may just look a little different than they would have pre-pandemic, namely in the choice to visit less-crowded destinations.

These travellers are motivated to travel internationally primarily to experience different cultures, as well as to get away, unplug and explore the outdoors. They are looking for destinations with beautiful scenery, natural attractions and historic/cultural sites but are still influenced by the safety of a destination as it relates to violence/unrest and finding a good deal on the holiday.

The majority of these travellers prefer to visit multiple destinations on their international holidays to experience as much as possible. They are most interested in visiting other places in Europe, with the highest interest in Italy and Spain, followed by the United States, the Caribbean and Canada.

Source: MMGY Global's 2022 *Portrait of European Travellers*™

INTERNATIONAL TRAVEL OUTLOOK

Key Findings

1. Despite concerns around the cost of travel and the economy, European international travellers are planning to take 2.3 trips during the next 12 months and are planning to spend an average of $3,975 on travel during that time.

2. French and British travellers plan to take the most international trips during that time, but spending on a per trip basis is highest for British, Spanish and Italian travellers.

3. European travellers are most impacted by the cost of airfare/lodging and concerns about personal safety related to violence/unrest, whilst they are least impacted by concerns about their personal health related to COVID-19. It is important to note that half of these travellers are still concerned about COVID-19 despite it ranking at the bottom of impacting factors.

Source: MMGY Global's 2022 *Portrait of European Travellers*™

Travel and Spending Intentions of European International Travellers Over Next 12 Months

2.3

International holidays during the next 12 months

$3,975

Anticipated spend on international holidays during the next 12 months*, up 1% from reported pre-pandemic average annual spend.

COUNTRY DIFFERENCES

- On a per trip basis, British, Spanish and Italian respondents intend to spend more than French and German respondents.

See page 8 for more detail.

GENERATIONAL DIFFERENCES

- Younger generations plan to take more trips, but spending intentions increase with age, which results in spending per trip being highest for Boomers and lowering as age decreases.

See page 9 for more detail.

INCOME DIFFERENCES

- The number of international trips travellers expect to take in the next 12 months and the amount they plan to spend increases as household income increases.

See page 10 for more detail.

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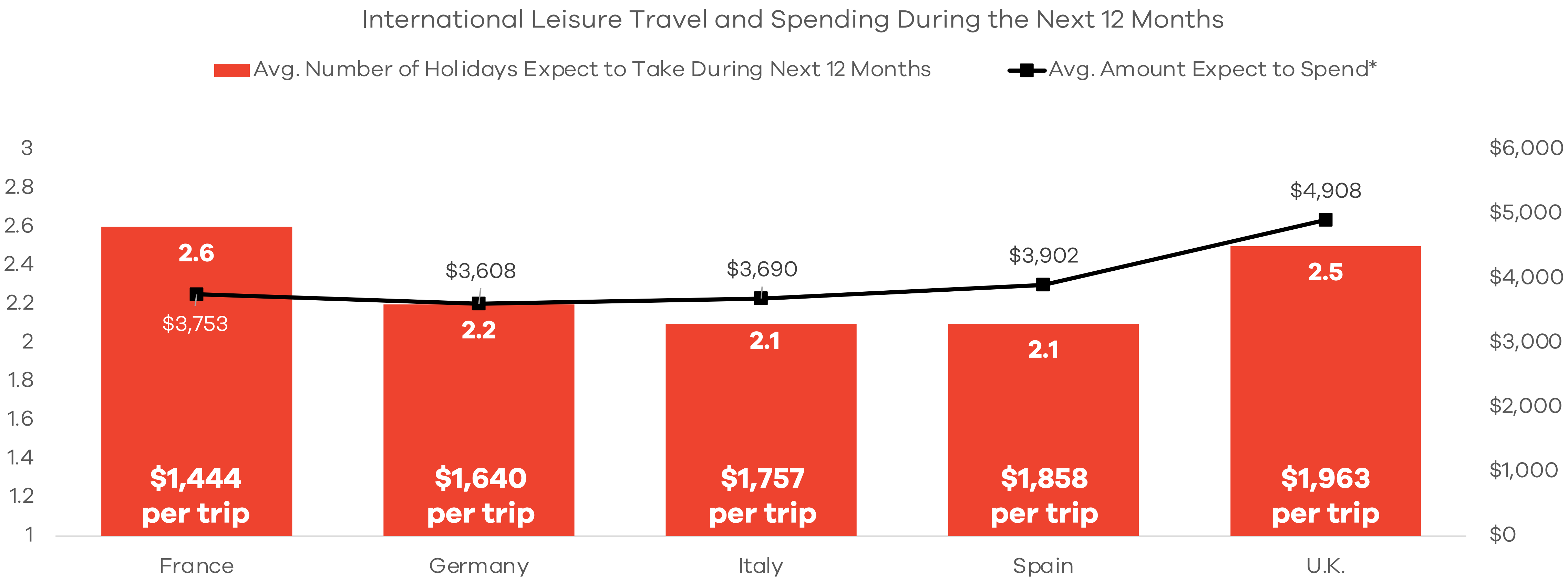
*GBP and ECU have been converted to USD on 24 Oct. 2022.

Source: MMGY Global's 2022 *Portrait of European Travellers*™

On a per trip basis, British, Spanish and Italian respondents intend to spend more than French and German respondents.



*GBP and ECU have been converted to USD on 24 Oct. 2022.
Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

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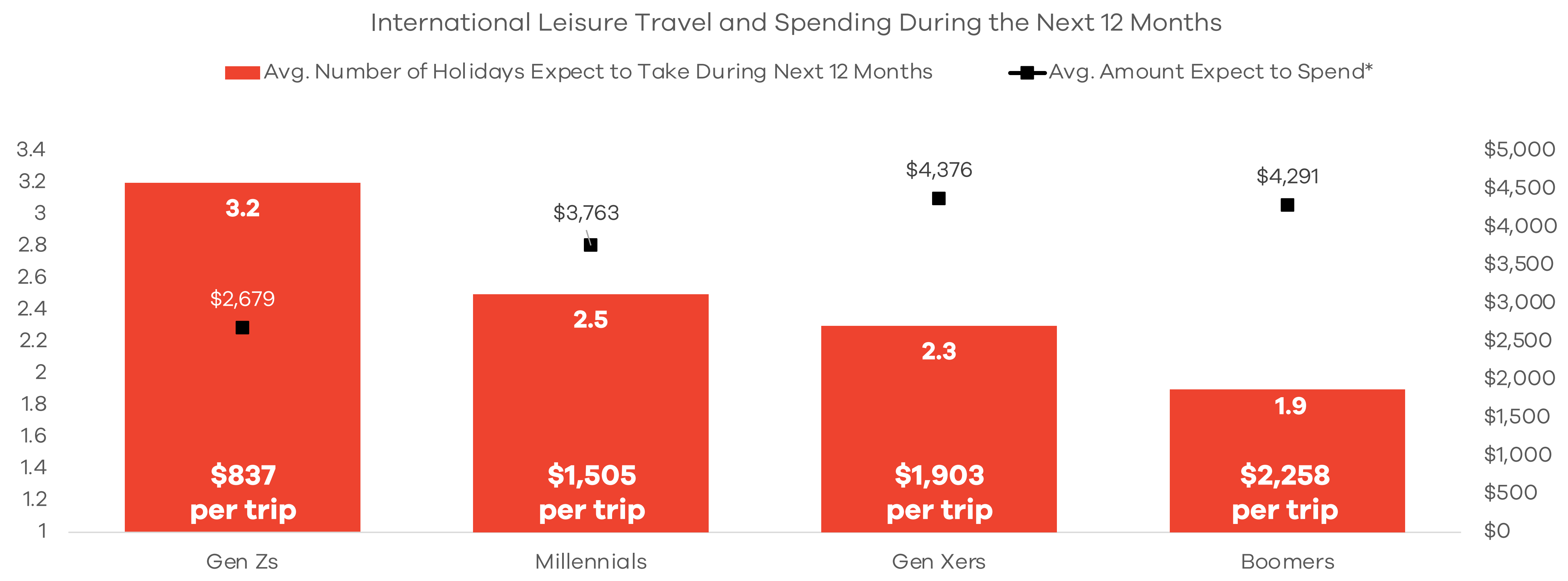
Spending per trip increases with age.



*GBP and ECU have been converted to USD on 24 Oct. 2022.
Base: European travellers (Gen Zs: n=460; Millennials: n=1,106; Gen Xers: n=1,094; Boomers: n=1,276)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

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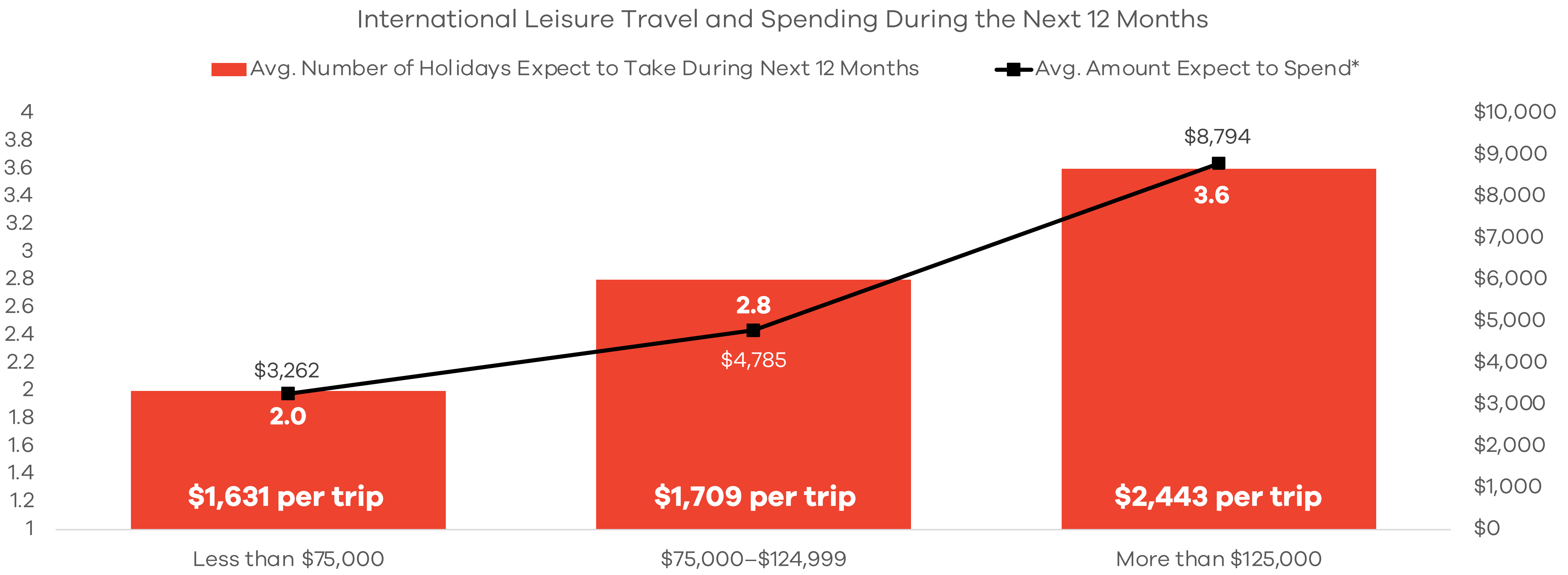
Expected international travel spend increases significantly amongst travellers with household incomes of $125,000 or more.



*GBP and ECU have been converted to USD on October 24, 2022.
Base: European travellers (Less than $75K: n=2,852; $75,000–$124,999: n=902; $125K+: n=265)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

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Concerns about COVID-19 rank at the bottom of factors that impact European travellers' international travel plans.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

See page 12 for more detail.

GENERATIONAL DIFFERENCES

- Millennials and Gen Xers are more impacted by the cost of travel, inflation and personal finances than the other generations.

INCOME DIFFERENCES

- The cost of airfare, inflation and personal finances are more impactful on those making less than $75K than on those with higher household incomes, whilst those making $125K+ are more impacted by COVID-19.

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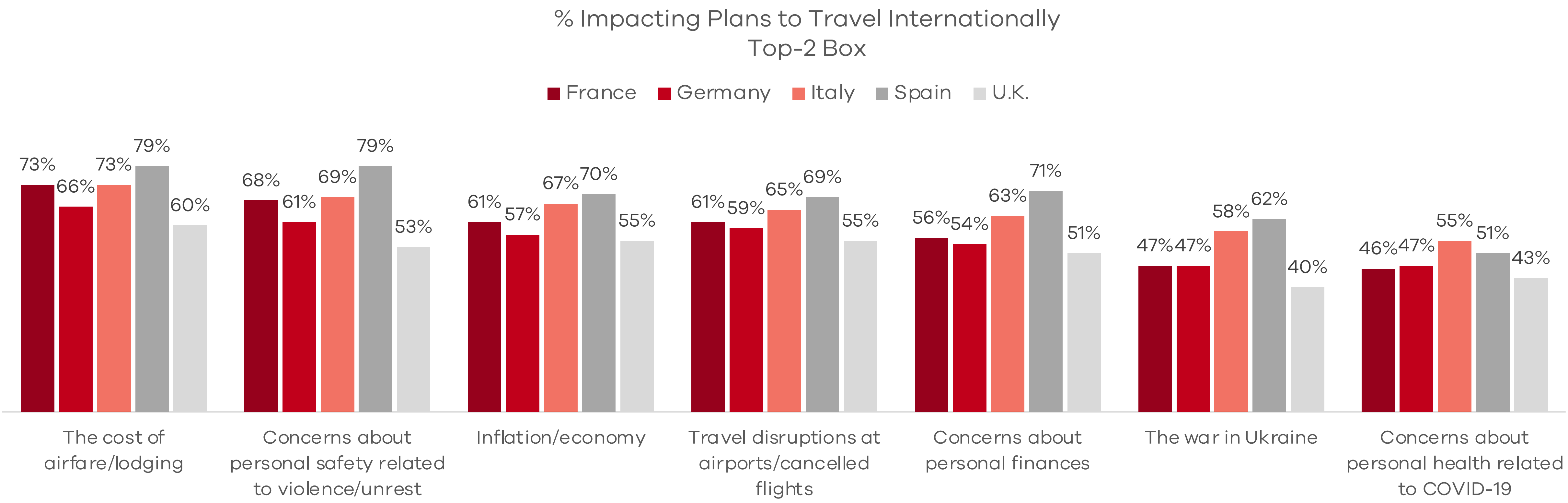
Italian and Spanish travellers are most impacted by each of these factors when planning travel, whilst British travellers are least impacted.

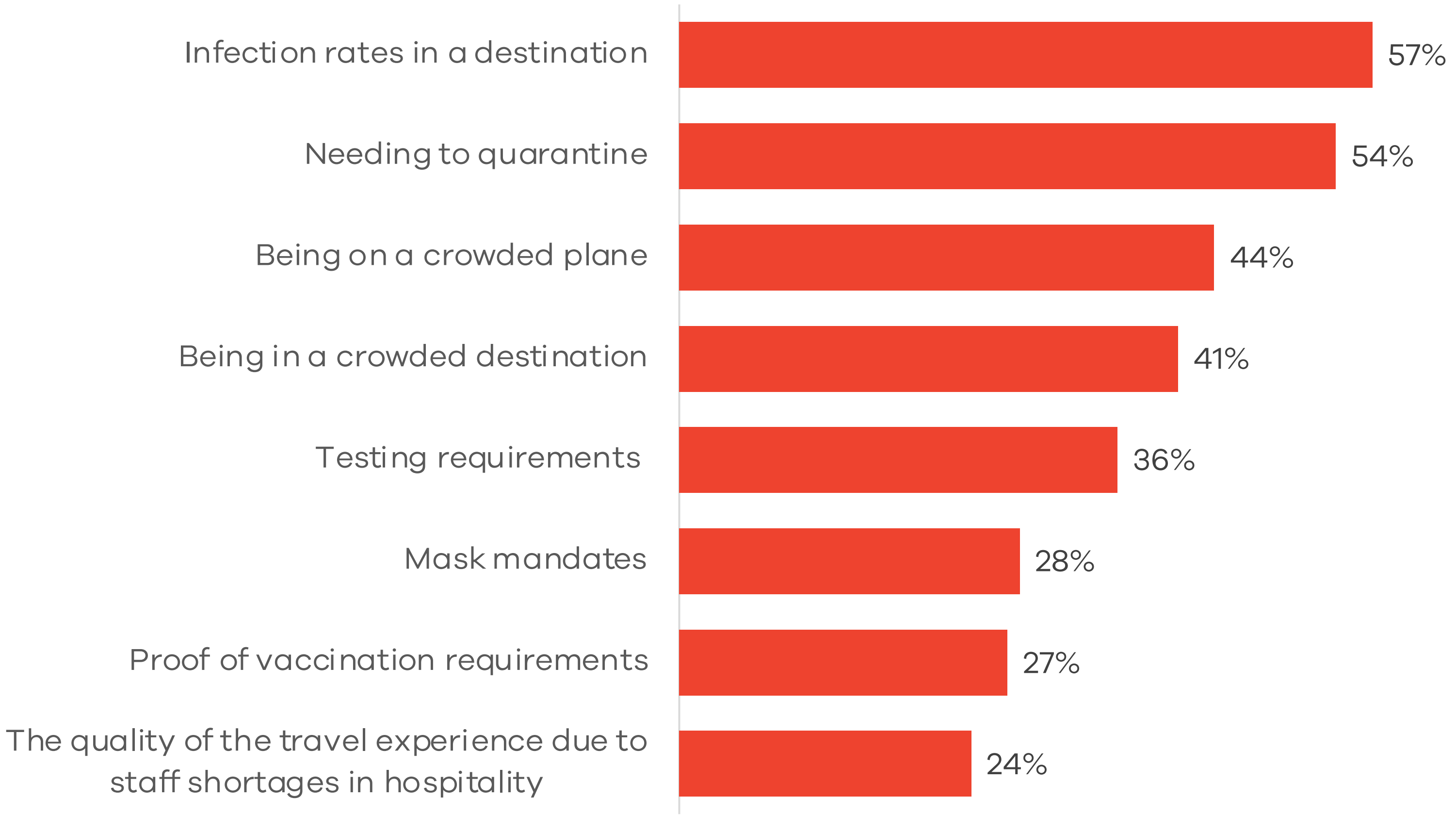


Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Most travellers aren't *too* concerned about COVID-19.

Seventy-two percent of international travellers indicate they are not concerned or are only somewhat concerned about COVID-19 when making travel plans.

Specific Concerns Related to COVID-19*



Base: European travellers with COVID-19 concerns* (n=2,474)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

See page 14 for more detail.

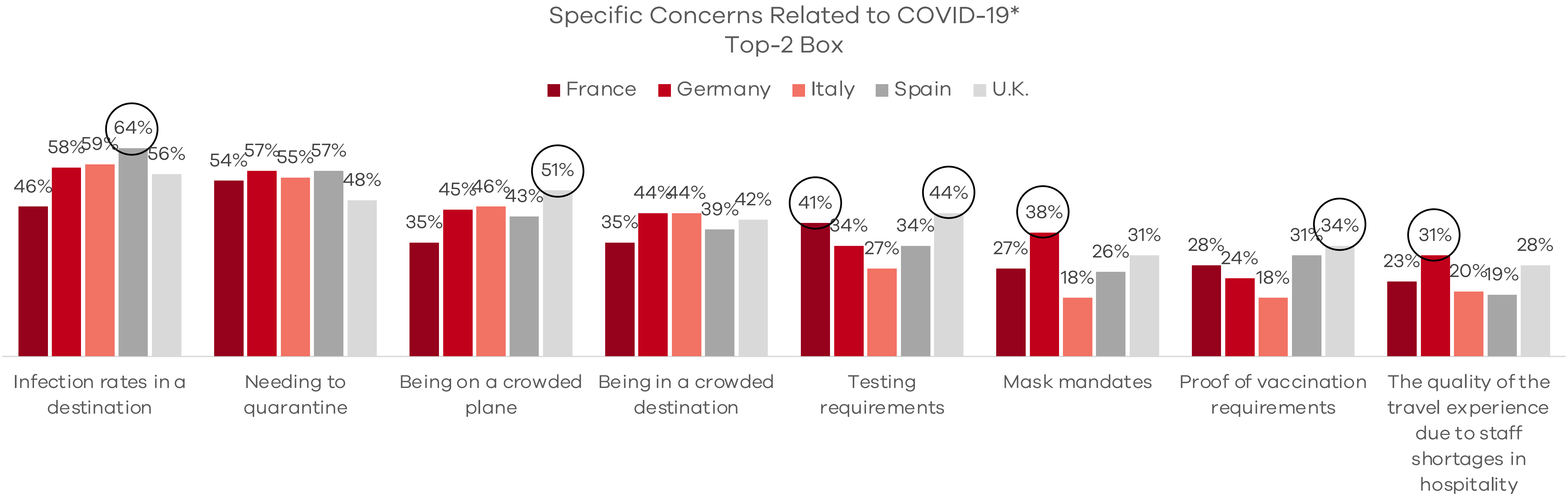
GENERATIONAL DIFFERENCES

- A higher percentage of Boomers, Gen Xers and Millennials express concerns about COVID-19 than Gen Zs, whilst Gen Zs are more concerned about the quality of their travel experience due to staffing shortages.

INCOME DIFFERENCES

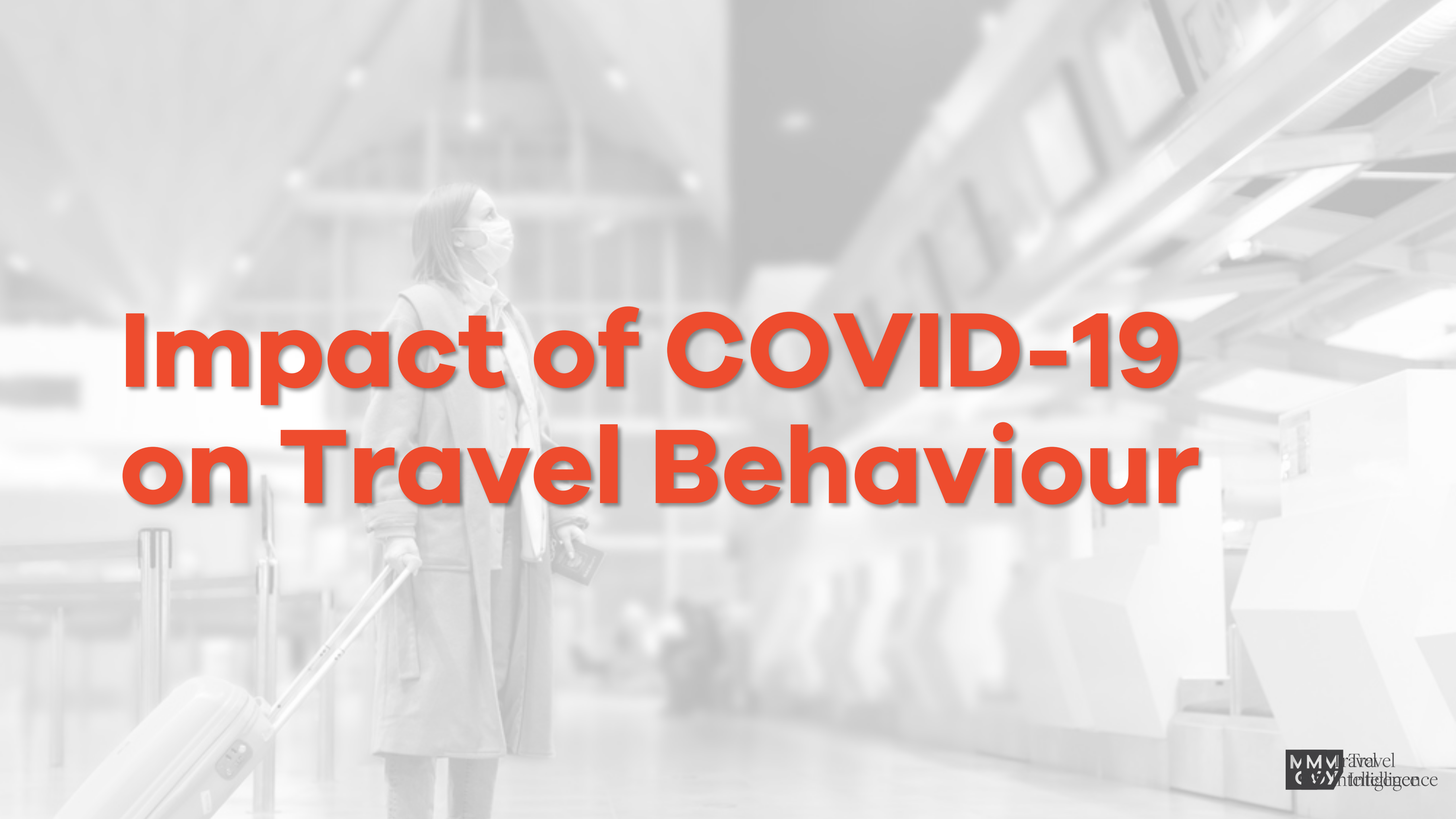
- A higher percentage of those making less than $75K are concerned about infection rates in a destination, quarantine requirements and being on a crowded plane, whilst more of those making $125K+ are concerned about mask mandates and the quality of their travel experience due to staffing shortages.

COVID-19 concerns vary by country of origin.



Base: European travellers with COVID-19 concerns* (France: n=444; Germany: n=476; Italy: n=507; Spain: n=540; U.K.: n=507)

Source: MMGY Global's 2022 *Portrait of European Travellers*™



Impact of COVID-19 on Travel Behaviour

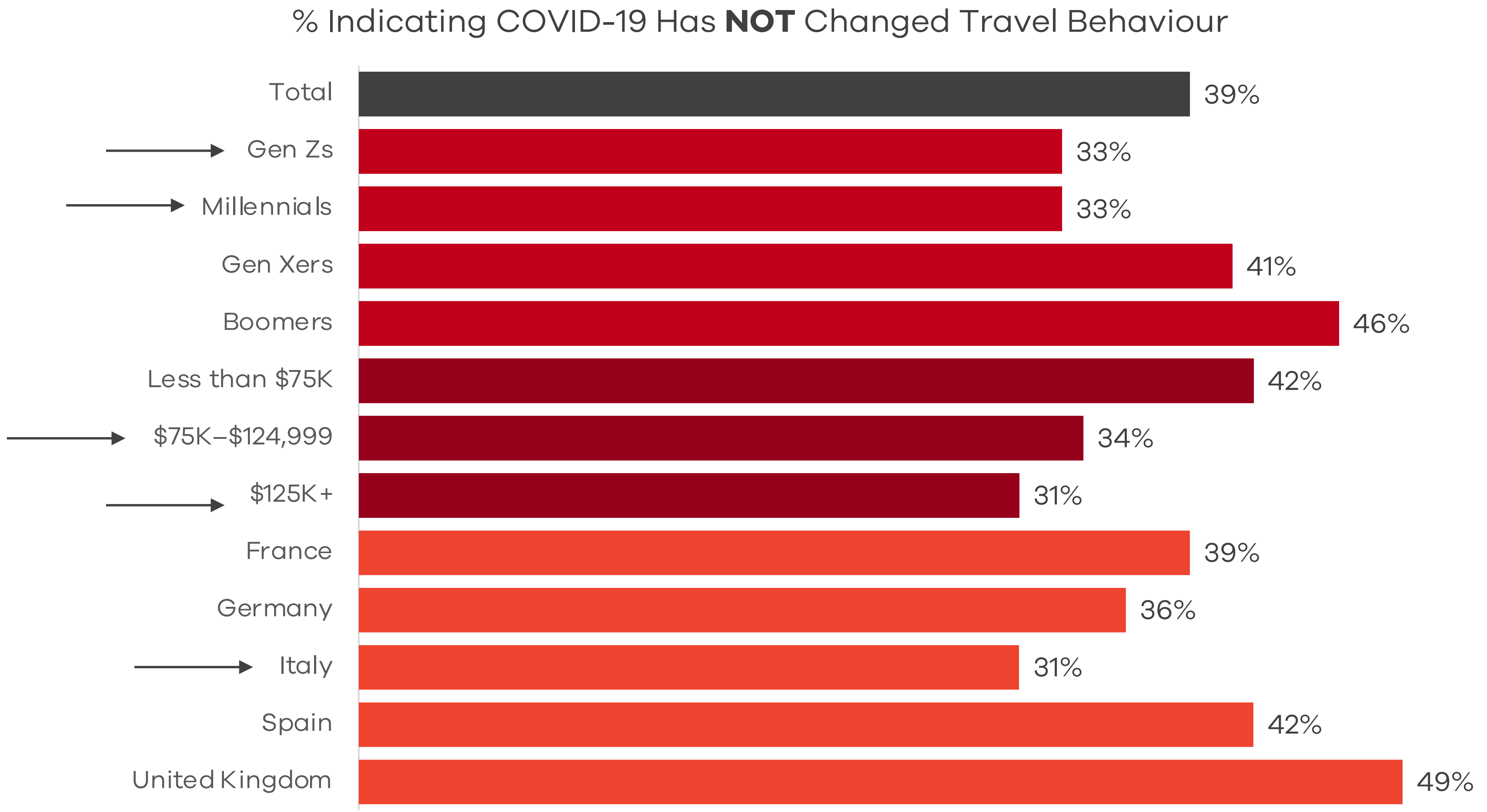
Impact of COVID-19 on Travel Behaviour

Key Findings

1. Six in 10 (61%) European travellers indicate that COVID-19 has changed their travel behaviour, but it has not impacted everyone equally. For example, only 51% of British travellers report that their travel behaviour has changed compared to 69% of Italian travellers.
2. Amongst those who say their travel behaviour has changed, European travellers are most likely to indicate that they are choosing to visit less-crowded destinations, particularly amongst German, Italian and British travellers.
3. Nearly half of European travellers indicate that COVID-19 has not changed their international travel planning window. More so than any other country of origin, 55% of British travellers indicate it has not changed their travel planning window, whilst those from France and Italy are more likely to say their window has changed.

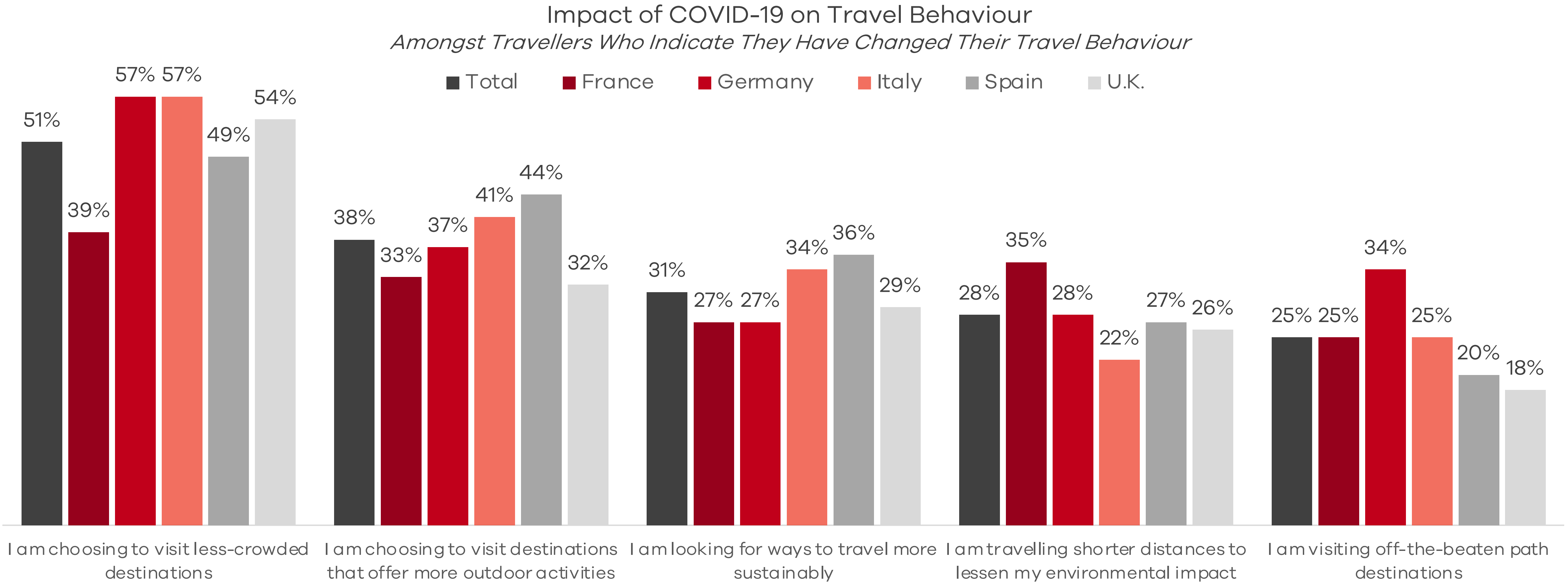
 Source: MMGY Global's 2022 *Portrait of European Travellers*™

COVID-19 is more likely to have changed the travel behaviour of Millennials, higher income households and travellers from Italy.



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Choosing to visit less-crowded destinations is the number one behavioural change travellers are making as a result of COVID-19.



Base: European travellers who have changed their travel behaviour
(Total: n=4,019; France: n=491; Germany: n=514; Italy: n=549; Spain: n=468; U.K.: n=416)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

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Nearly half of European travellers say that the pandemic has not changed their planning window for international travel.

How has the pandemic changed the lead time of planning an international holiday?

Planning International Holidays	2022
Less than 3 months	24%
3–6 months	50%
6–12 months	23%
More than 12 months	4%

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

- Those from France and Italy are more likely to say that their planning window for international holidays has changed due to the pandemic while those from the U.K. are more likely to say that it hasn't.

GENERATIONAL DIFFERENCES

- Younger generations are more likely to say that their planning window for international holidays has changed due to the pandemic while Boomers and Gen Xers are more likely to say that it hasn't.

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Travel Motivators & Activities

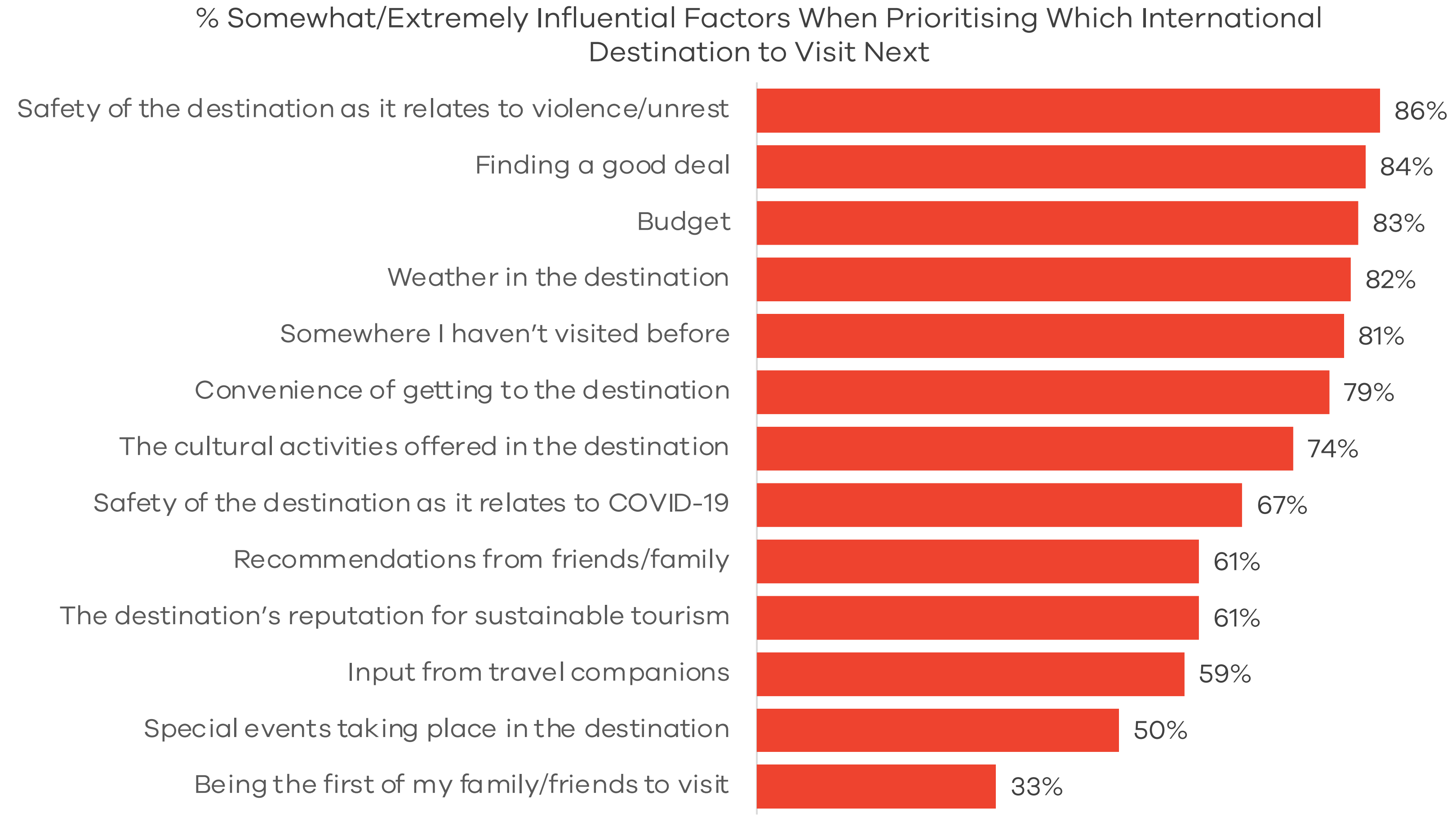
TRAVEL MOTIVATORS & ACTIVITIES
Key Findings

1. When selecting an international destination, European travellers are influenced by the safety of the destination, finding a good deal and their budget.

2. Experiencing different cultures is the primary motivator for travelling internationally across all countries of origin, generations and income levels, followed by the desire to get away and unplug, and to explore nature and the outdoors.

Source: MMGY Global's 2022 *Portrait of European Travellers*™

The safety of the destination is the biggest factor when deciding where to travel, followed by finding a good deal and the budget for the holiday.



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

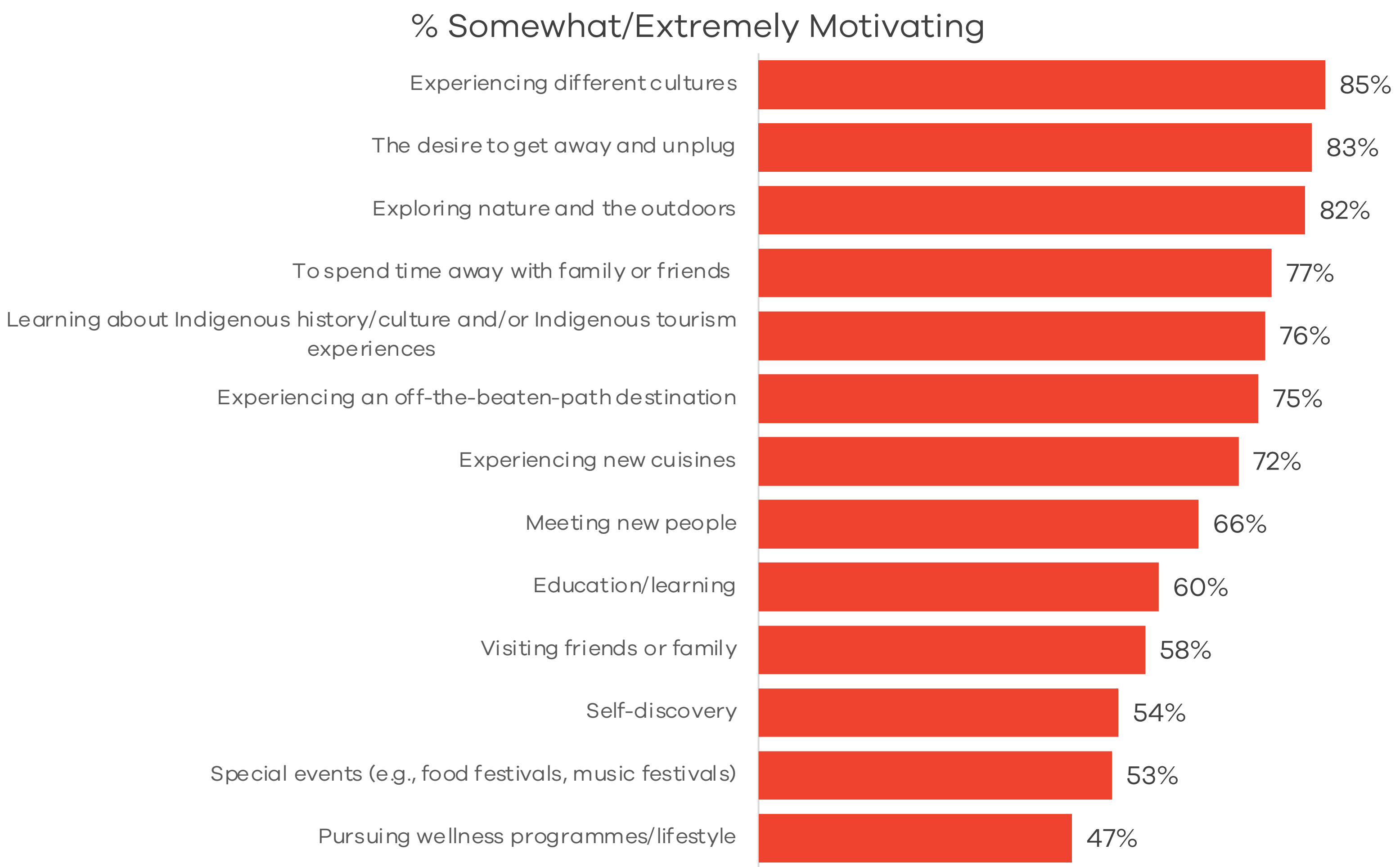
COUNTRY DIFFERENCES

- The safety of the destination is the biggest factor for German, Italian, Spanish and British travellers, while going somewhere they haven't visited before is the biggest factor for French travellers.

GENERATIONAL DIFFERENCES

- Millennials, Gen Xers and Boomers are most influenced by the safety of the destination when selecting an international destination, while Gen Zs are most influenced by a destination they haven't visited before.

Experiencing different cultures is the primary motivator to travel internationally, followed by the desire to get away and to explore nature and the outdoors.



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

- The top motivations to travel internationally differ by country of origin, but all are motivated by the ability to experience different cultures.

See page 24 for more detail.

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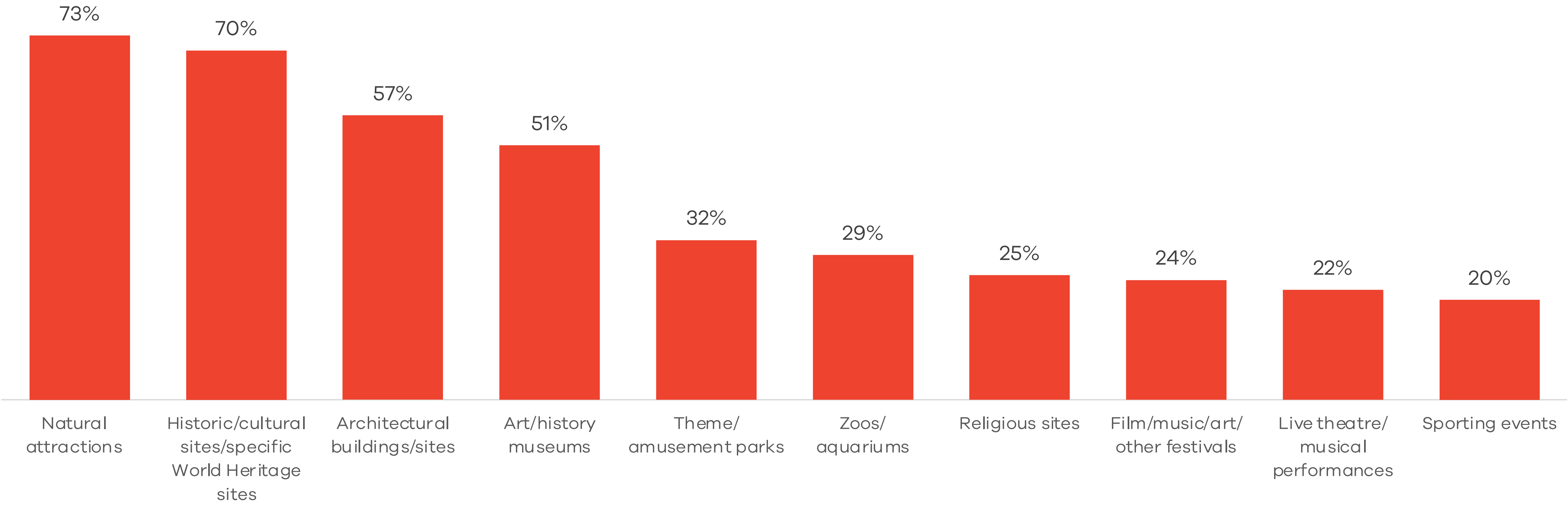
Top Motivations by Country of Origin

Top three motivations for each country of origin are shaded in black.

	France	Germany	Italy	Spain	U.K.
Experiencing different cultures	88%	78%	91%	89%	79%
The desire to get away and unplug	80%	81%	87%	87%	80%
Exploring nature and the outdoors	83%	81%	89%	83%	74%
To spend time away with family or friends	78%	71%	78%	78%	80%
Learning about Indigenous history/culture and/or Indigenous tourism experiences	82%	63%	89%	79%	65%
Experiencing an off-the-beaten path destination	82%	67%	84%	85%	58%
Experiencing new cuisines	79%	50%	79%	79%	74%
Meeting new people	74%	57%	73%	69%	56%
Education/learning	61%	41%	92%	61%	46%
Visiting friends or family	62%	48%	56%	65%	58%
Self-discovery	50%	41%	70%	60%	51%
Special events (e.g., food festivals, music festivals)	53%	38%	58%	62%	52%
Pursuing wellness programs	44%	35%	55%	63%	38%

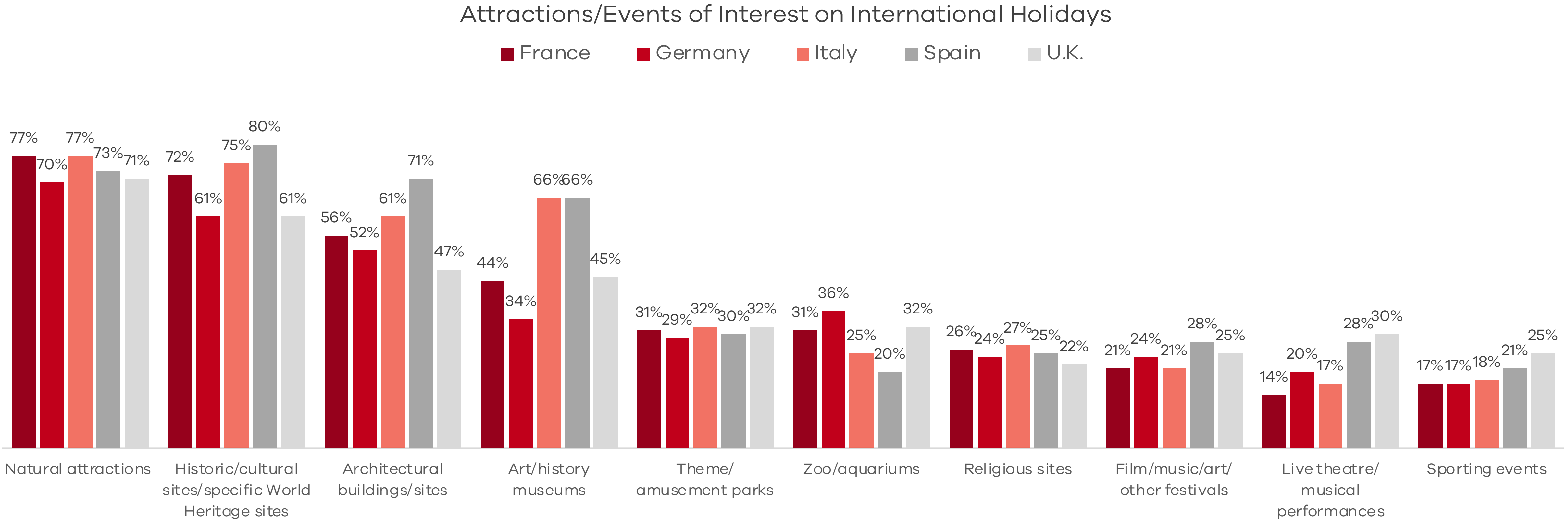
Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Attractions/Events of Interest on International Holidays



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Interest in attractions/events varies by country.



Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Top Activities of Interest on International Holidays

	% Interested
Enjoying beautiful scenery	72%
Historic sites	65%
Restaurant/food experiences	59%
Museums	49%
Local experiences I can plan/discover for myself	48%
Walking tours	45%
Guided tours with access to local experiences that are otherwise inaccessible	44%
Shopping at local boutiques	33%
Day cruises (dinner cruise, sightseeing cruise, etc.)	32%
Hiking/climbing/biking/other outdoor adventures	31%
Adventure travel (safaris, mountain climbing, trekking holidays, etc.)	29%
Family-friendly activities	27%
Vibrant nightlife	22%
Live theatre or musical performances	20%
Participating in water sports (waterskiing, surfing, scuba diving, kayaking, sailing, etc.)	18%
Exploring family's background/past on a heritage holiday	16%
Shopping at high-end retailers	14%
Skiing/snowboarding	8%
Playing golf	5%

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

See page 28 for details.

Top Activities of Interest by Country of Origin

Top five activities of interest for each country are shaded in black.

	France	Germany	Italy	Spain	U.K.
Enjoying beautiful scenery	73%	69%	74%	72%	71%
Historic sites	64%	62%	70%	75%	54%
Restaurant/food experiences	56%	57%	54%	60%	67%
Museums	43%	38%	59%	60%	44%
Local experiences I can plan/discover for myself	39%	48%	46%	54%	53%
Walking tours	44%	39%	48%	60%	34%
Guided tours with access to local experiences that are otherwise inaccessible	44%	40%	47%	51%	38%
Shopping at local boutiques	38%	30%	32%	29%	33%
Day cruises (dinner cruise, sightseeing cruise, etc.)	27%	30%	29%	34%	39%
Hiking/climbing/biking/other outdoor adventures	40%	35%	20%	35%	26%
Adventure travel (safaris, mountain climbing, trekking holidays, etc.)	29%	26%	32%	33%	26%
Family-friendly activities	31%	25%	17%	33%	28%
Vibrant nightlife	23%	17%	26%	25%	19%
Live theater or musical performances	14%	16%	16%	28%	25%
Participating in water sports (waterskiing, surfing, scuba diving, kayaking, sailing, etc.)	18%	21%	15%	17%	18%
Exploring family's background/past on a heritage holiday	14%	20%	16%	15%	17%
Shopping at high-end retailers	12%	17%	14%	10%	19%
Skiing/snowboarding	9%	10%	8%	7%	9%
Playing golf	4%	6%	4%	4%	7%

Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

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Travellers are most interested in authentic and local dining experiences.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

- Spanish travellers are more interested in hard-to-find dishes unique to the destination, brand-new dining experiences and food tours compared to travellers from the remaining countries of origin, whilst French travellers are more interested in authentic foods eaten by locals.

GENERATIONAL DIFFERENCES

- Millennials and Gen Xers are more interested than Boomers in brand-new dining experiences and food tours whilst Boomers are more interested in authentic food eaten by locals and winery tours.

MMGY Travel Intelligence

Sources of Travel Information

SOURCES OF TRAVEL INFORMATION

Key Findings

1. When planning international travel, online travel agencies, destination websites and travel review sites are the top sources travellers consider, even more so than friends and family.

2. Online travel agencies and destination websites are the top sources for those in France, Germany and Italy, but those in Spain and the U.K. are turning to friends and family as well as travel review websites.

3. The sources used vary by generation, with older audiences more likely to use the destination websites as well as online and printed visitor guides, whilst video sharing websites and social media are more important to younger audiences.

4. Booking.com is the top website used by European travellers to obtain international travel information, followed by Tripadvisor. Younger generations are more likely to use YouTube, Skyscanner, Google Travel and Kayak, whilst older generations are more likely to use specific travel service providers and destination websites.

 Source: MMGY Global's 2022 *Portrait of European Travellers*™

65%

indicate that they are relying on more sources of advice than ever before when making travel decisions.

France	Germany	Italy	Spain	U.K.	Gen Zs	Millennials	Gen Xers	Boomers	Under $75K	$75K+
<u>70%</u>	56%	<u>68%</u>	<u>81%</u>	49%	67%	<u>71%</u>	64%	60%	65%	65%

Steps in the Travel Planning Process

Ranking of Travel Planning Steps ***(1 First step, 9 Last step)***	**Mean**
Select the destination	2.6
Set holiday budget	3.3
Pick type of holiday (cruise, beach, golf, etc.)	3.8
Compare prices/features for possible travel service providers (accommodations, flights, rental cars, etc.)	3.9
Research online travel reviews/ratings	4.2
Talk to friends and family about possible holiday plans	4.5
Book accommodations/transportation	4.9
Decide on holiday activities (theme parks, restaurants, shopping, etc.)	5.5
Talk to a traditional travel advisor	5.8

COUNTRY DIFFERENCES

Setting the holiday budget is typically done earlier in the process for travellers in France than those from the remaining countries, with travellers from the U.K. setting the holiday budget later than all other countries.

INCOME DIFFERENCES

Setting the holiday budget is typically done earlier in the process for travellers making less than $75K.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Online travel agencies, destination websites and travel review sites are the top sources for European travellers.

Sources Considered When Planning Travel	
Online travel agencies (Expedia, Booking.com, etc.)	45%
The destination's website	44%
Travel review websites	42%
Friends and family	40%
Online visitor guides	30%
Printed travel guidebooks	28%
Traditional travel advisor	23%
Video-sharing websites (YouTube, etc.)	21%
Travel service provider websites (Hilton, Delta Air Lines, etc.)	20%
Television shows	19%
Social media posts from destinations or travel service providers	16%
Non-digital magazine/newspaper articles	13%
Digital newspaper/magazine	13%
Online/social media advertising	12%
Television advertising	11%
Email from the travel service provider	10%
Streaming TV services (Netflix, Amazon Prime Video, etc.)	10%
Social media influencers	9%
Email from the destination	9%
Content from publishers (The Times, Der Spiegel, Le Figaro, etc.)	8%
Non-digital magazine/newspaper advertisements	8%
Direct mail	7%
Podcasts	6%
Radio shows/advertising	5%
Billboards	5%
Streaming audio (Pandora, Spotify, etc.)	5%

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES
See page 35 for details.

GENERATIONAL DIFFERENCES
See page 36 for details.

Online travel agencies and destination websites are the top sources for those in France, Germany and Italy, but those in Spain and the U.K. are also turning to friends and family and travel review websites.

Top five sources considered by each generation are shaded in black.

Sources Considered When Planning Travel	France	Germany	Italy	Spain	U.K.
Online travel agencies	39%	44%	52%	48%	41%
The destination's website	44%	36%	48%	49%	44%
Travel review websites	30%	35%	50%	47%	46%
Friends and family	34%	40%	36%	49%	42%
Online visitor guides	35%	15%	33%	38%	29%
Printed travel guidebooks	31%	32%	32%	24%	22%
Traditional travel advisor	24%	20%	22%	30%	17%
Video-sharing websites	19%	21%	22%	28%	15%
Travel service provider websites	18%	22%	19%	22%	19%
Television shows	14%	25%	16%	21%	18%
Social media posts from destinations or travel service providers	11%	18%	13%	22%	16%
Non-digital magazine/newspaper articles	14%	13%	15%	13%	9%
Digital newspaper/magazine	11%	12%	16%	14%	9%
Online/social media advertising	8%	11%	9%	17%	13%
Television advertising	9%	13%	10%	10%	13%
Email from the travel service provider	9%	12%	9%	12%	10%
Streaming TV services	7%	8%	12%	12%	10%
Social media influencers	6%	8%	10%	10%	11%
Email from the destination	8%	10%	8%	9%	8%
Content from publishers	16%	10%	8%	9%	10%
Non-digital magazine/newspaper advertisements	10%	9%	8%	9%	6%
Direct mail	3%	7%	10%	8%	7%
Podcasts	5%	7%	7%	8%	5%
Radio shows/advertising	6%	6%	5%	5%	5%
Billboards	5%	5%	4%	6%	4%
Streaming audio	4%	4%	6%	5%	4%

Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

MMGY Travel Intelligence

Online travel agencies, destination websites, travel review websites, and friends and family are top sources used for all generations.

Top five sources considered by each generation are shaded in black.

Sources Considered When Planning Travel	Gen Zs	Millennials	Gen Xers	Boomers
Online travel agencies	38%	40%	47%	49%
The destination's website	34%	35%	47%	52%
Travel review websites	37%	40%	46%	41%
Friends and family	48%	39%	37%	40%
Online visitor guides	24%	26%	31%	35%
Printed travel guidebooks	14%	21%	28%	38%
Traditional travel advisor	14%	15%	22%	32%
Video-sharing websites	30%	26%	20%	15%
Travel service provider websites	17%	19%	23%	20%
Television shows	15%	16%	20%	21%
Social media posts from destinations or travel service providers	21%	21%	16%	10%
Non-digital magazine/newspaper articles	6%	11%	13%	16%
Digital newspaper/magazine	9%	11%	14%	13%
Online/social media advertising	18%	18%	10%	6%
Television advertising	15%	13%	11%	8%
Email from the travel service provider	7%	11%	10%	11%
Streaming TV services	17%	15%	8%	5%
Social media influencers	20%	15%	7%	1%
Email from the destination	11%	11%	8%	6%
Content from publishers	13%	10%	8%	6%
Non-digital magazine/newspaper advertisements	10%	8%	8%	8%
Direct mail	9%	8%	8%	5%
Podcasts	13%	9%	5%	3%
Radio shows/advertising	9%	7%	4%	4%
Billboards	7%	8%	5%	2%
Streaming audio	10%	7%	4%	2%

Base: European travellers (Gen Zs: n=460; Millennials: n=1,106; Gen Xers: n=1,094; Boomers: n=1,276)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

GENERATIONAL DIFFERENCES

- Gen Zs are most likely to turn to family and friends whilst the remaining generations are using online travel agencies, destination websites and travel review websites.
- Younger generations are using video sharing websites and social media more than older generations.
- Older audiences are more likely to use the destination's website, online visitor guides and printed visitor guides.

MMGY Travel Intelligence

Booking.com is the top website used for international travel information.

Specific Websites Used to Obtain International Travel Information	
Booking.com	57%
Tripadvisor	45%
Trivago	35%
Expedia	32%
YouTube	25%
Specific airline brand website (such as Delta Air Lines/British Airways)	21%
Specific destination website (such as Visit London)	21%
Skyscanner	19%
Specific hotel brand website (such as Hilton/Marriott)	17%
Google Travel	15%
Travel blogs	14%
lastminute.com	14%
Kayak	14%
eDreams ODIEGO	7%
None of the above	6%

GENERATIONAL DIFFERENCES

- Younger generations are significantly more likely than older generations to use YouTube, Skyscanner, Google Travel and Kayak.
- Boomers are significantly more likely than younger generations to go straight to the travel service provider or destination website when booking travel.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Four in 10 European travellers indicate they use social media for travel planning, and Instagram is used most often for this purpose.

Social Media Platforms Used When Planning Travel *Among All European travellers*	
Instagram	20%
YouTube	18%
Facebook/Meta	14%
TikTok	7%
Twitter	5%
Pinterest	4%
Telegram	4%
Snapchat	3%
LinkedIn	2%
Twitch	2%
Tumblr	1%
None of these	43%
Do not have a profile/page on social media	14%

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

COUNTRY DIFFERENCES

- More French, German and Italian travellers are using social media when planning travel compared to those from Spain and the U.K.

GENERATIONAL DIFFERENCES

- Significantly fewer Boomers indicate they use social media for travel planning.
- Whilst Instagram and YouTube are the most used by both Gen Zs and Millennials, significantly more Millennials are using Facebook/Meta whilst significantly more Gen Zs are using TikTok.

INCOME DIFFERENCES

- Significantly more travellers with incomes of $75K+ than travellers with incomes <$75K indicate they use social media for travel planning.

Social media is playing a role in travel decision-making.

Follow a destination on social media	31%
Have selected a holiday destination at least partially on information, photos or videos viewed on social media	49%
Social media influencers have a great deal/somewhat of an influence on travel decisions	35%
Content Considered to Be the Most Inspirational	
Authentic images of the destination taken by other travellers	57%
Beautiful pictures taken by professional photographers in the destination	47%
Stories from/about fellow travellers	47%
Special offers/promotions from travel service providers in the destination	43%
Insider information/access from the destination	38%
Sustainability initiatives	23%
Contests/sweepstakes	18%

Base: European travellers who have social media (n=3,471)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

- More travellers from Spain and Italy than the other countries follow a destination on social media.

GENERATIONAL DIFFERENCES

- The percentage of travellers who follow a destination on social media decreases with age.

MMGY Travel Intelligence

International Travel Preferences

INTERNATIONAL TRAVEL PREFERENCES

Key Findings

1. The vast majority of international travellers prefer to visit multiple destinations on a single holiday as opposed to staying in one destination as they want to experience as much as possible on one trip.

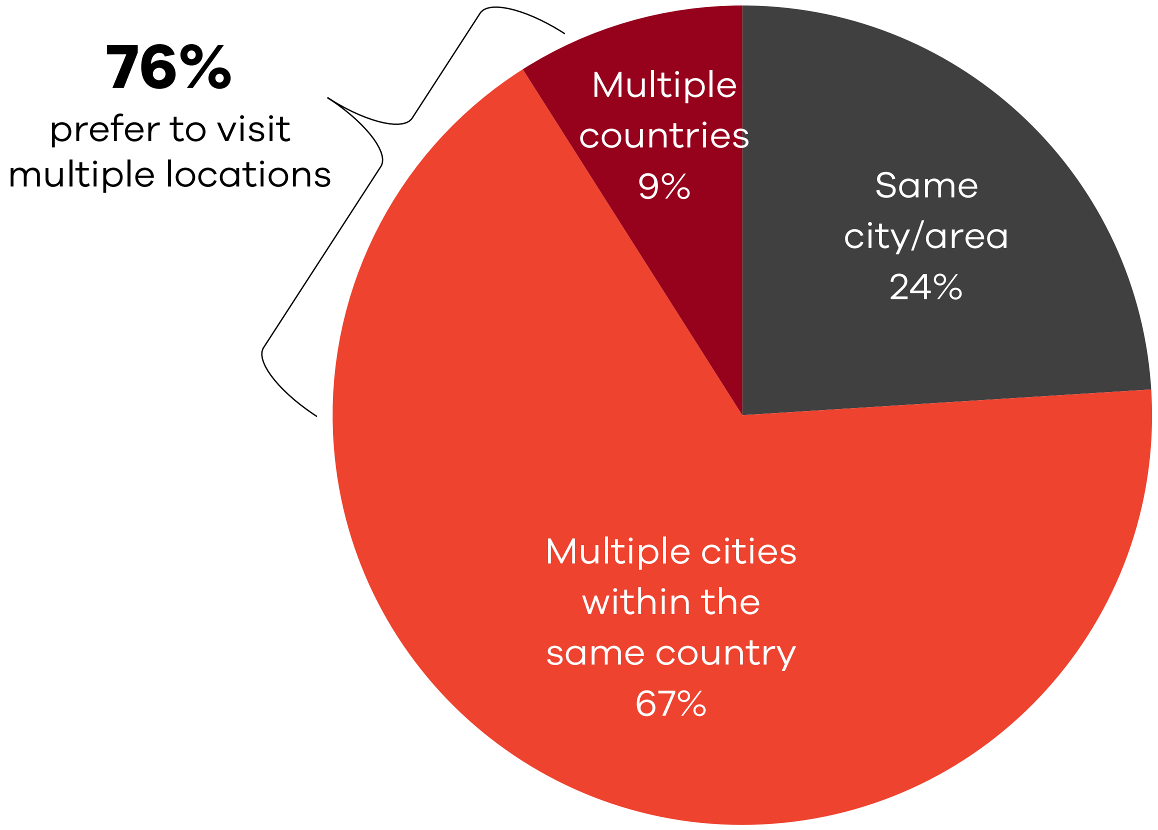
2. Although all European travellers agree on their top choice of accommodations being traditional chain-affiliated hotels, their second choice varies by country of origin with Spanish and British travellers choosing to stay in resorts, French travellers choosing short-term holiday rentals, and Italian travellers choosing bed-and-breakfast accommodations.

3. A traditional, chain-affiliated hotel is by far the preferred accommodation type for Millennials, Gen Xers and Boomers, but Gen Zs are most likely to stay in short-term holiday rentals.

4. Travelling with a significant other is the most popular type of travel party – this is the typical travel party for 68% of European travellers. One-quarter (24%) typically travel internationally with friends, the second most popular travel-party composition.

Source: MMGY Global's 2022 *Portrait of European Travellers*TM

The vast majority of European travellers prefer to visit multiple destinations on one holiday.



COUNTRY DIFFERENCES

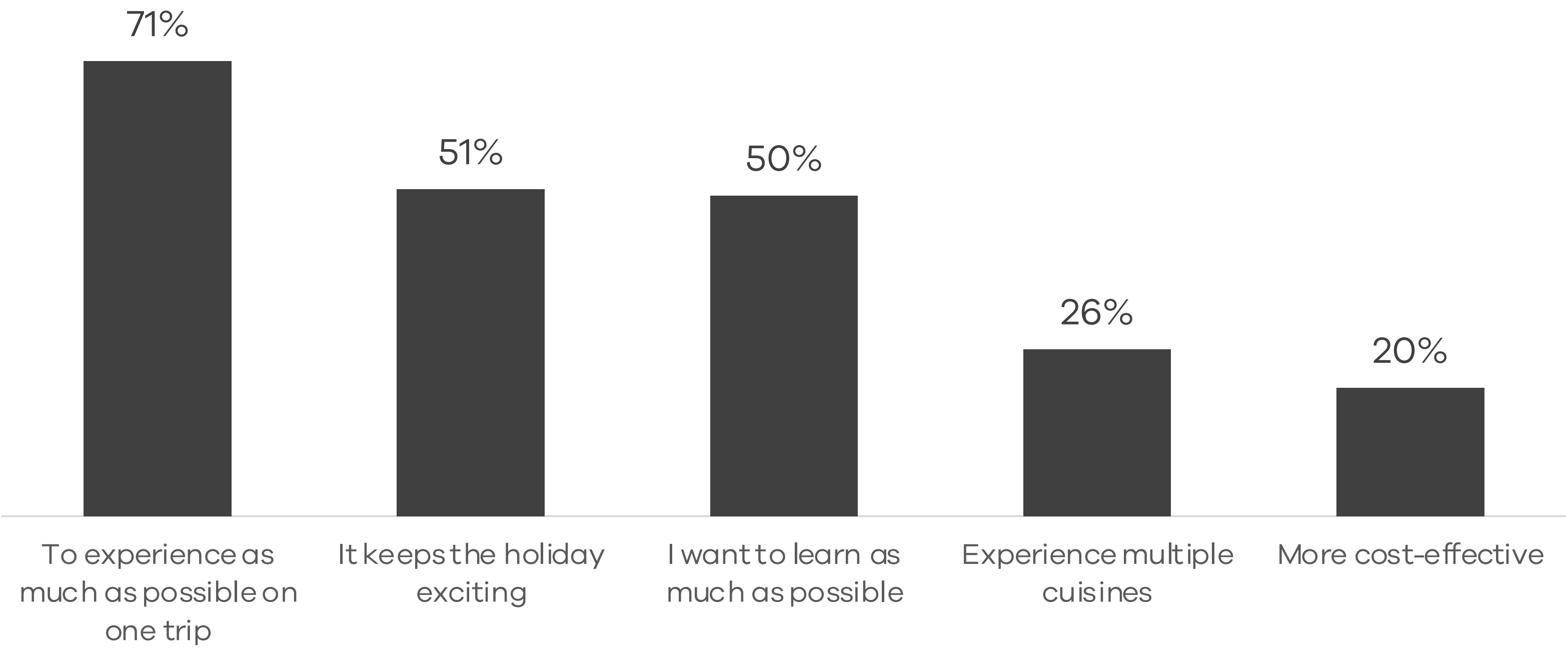
- More travellers from France, Italy and Spain than those from the U.K. and Germany prefer to visit multiple destinations on one holiday.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

MMGY Travel Intelligence

European travellers are choosing to visit multiple destinations on their international holidays to experience as much as possible on one trip.

Reasons for Preference of Visiting Multiple Destinations



Base: European travellers who prefer to visit multiple destinations (n=3,052)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

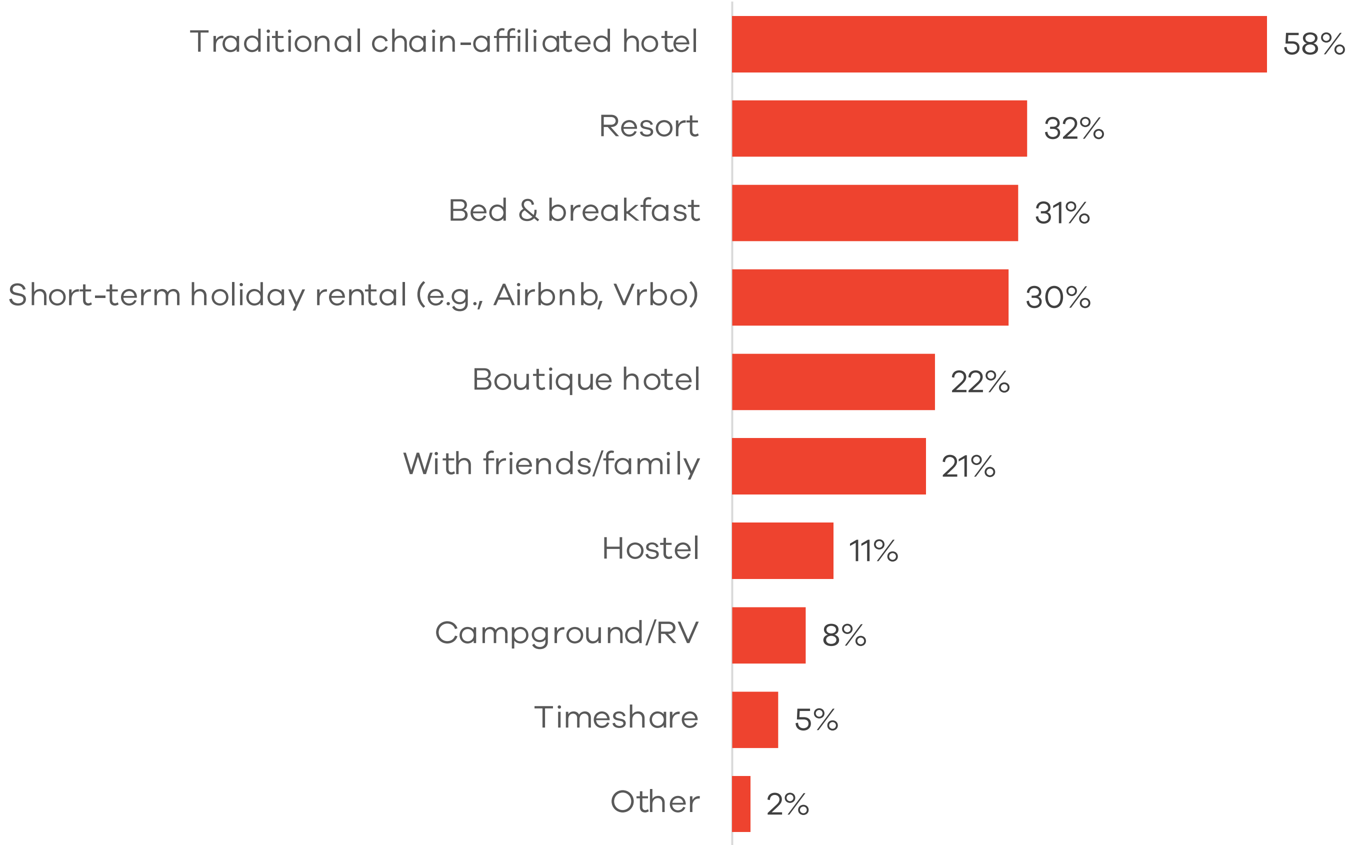
GENERATIONAL DIFFERENCES

- Older generations are more likely to choose to visit multiple destinations on one holiday to experience as much as possible on one trip, while younger generations are more likely to do so because it is more cost-effective.

MMGY Travel Intelligence

A traditional hotel is the most used accommodation type.

Accommodation Type Likely to Use on International Holidays



Base: European travellers (n=4,019)

Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

See page 45 for details.

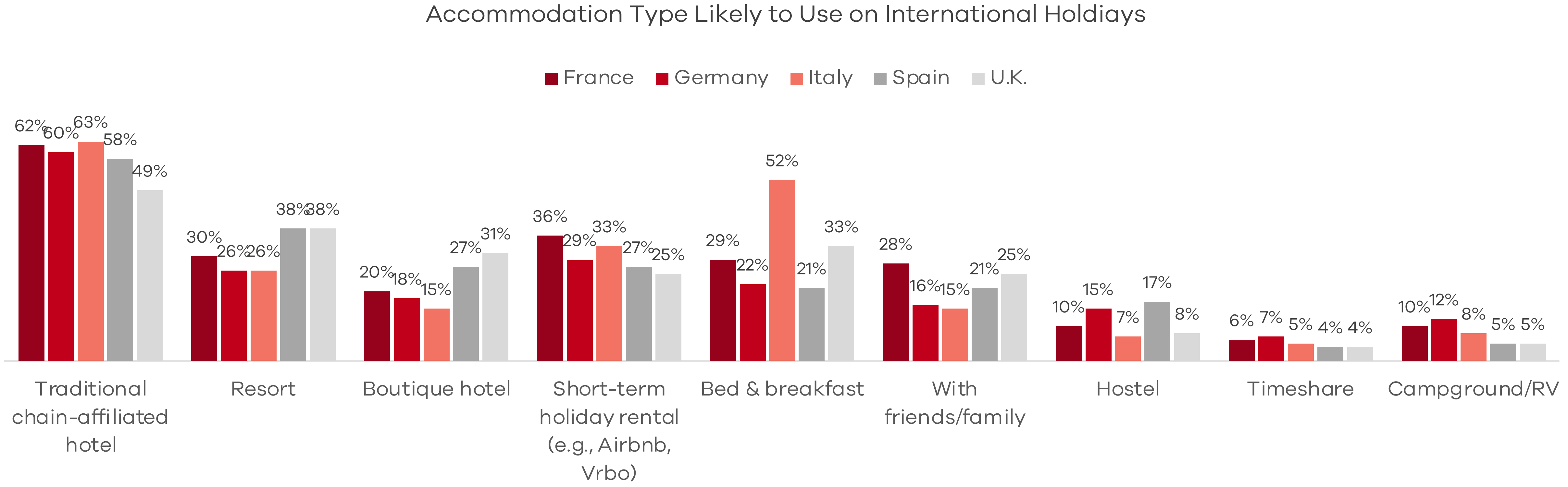
GENERATIONAL DIFFERENCES

- While traditional chain-affiliated hotels are the top choice of Millennials, Gen Xers and Boomers, Gen Zs are most likely to use a short-term holiday rental on an international holiday.

INCOME DIFFERENCES

- Higher-income travellers ($75K+) are more likely to stay in boutique hotels than lower income travellers (<$75K).

Although all European travellers agree on their top choice of accommodations being traditional chain-affiliated hotels, their second choice varies by country of origin.

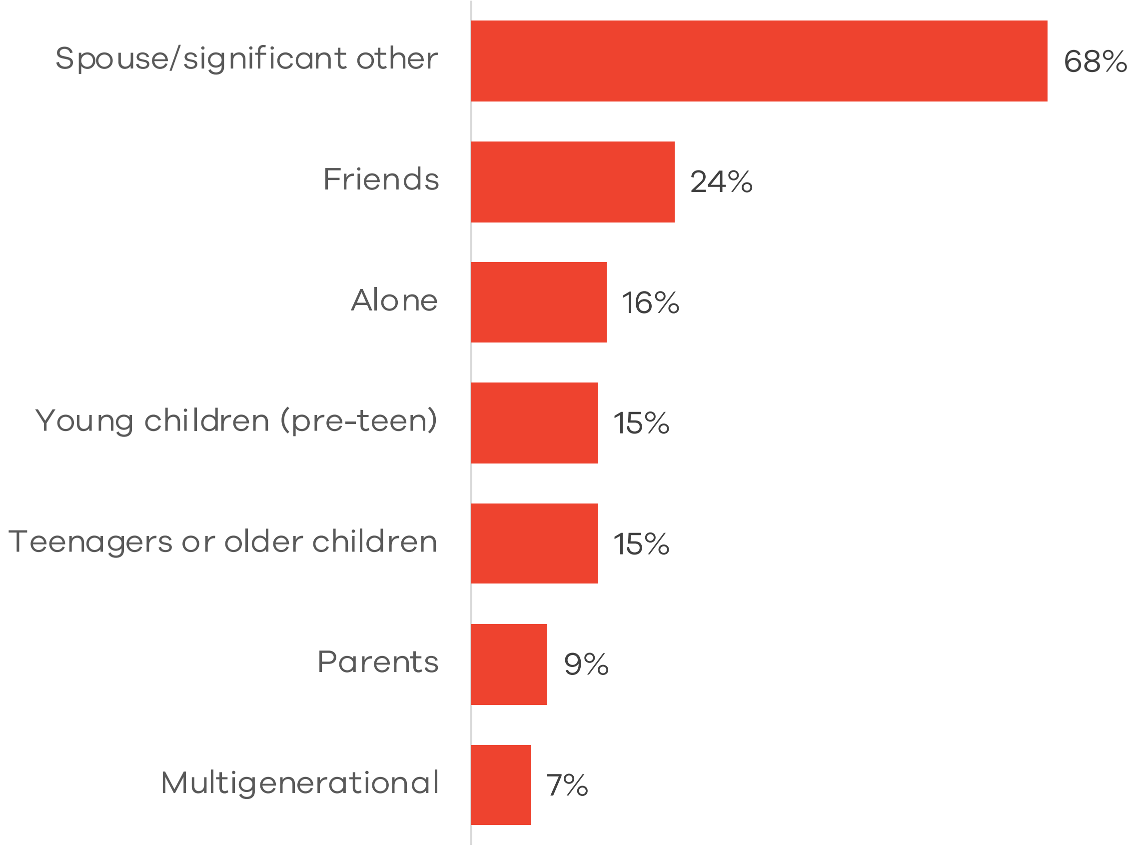


Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

Seven in 10 European travellers are travelling internationally with their significant other.

Typical Travel Party Composition When Travelling Internationally



GENERATIONAL DIFFERENCES

- Younger generations are more likely than older generations to travel with children, to travel with friends and to travel with parents on an international holiday.

INCOME DIFFERENCES

- Higher-income travellers ($75K+) are more likely than lower-income travellers (<$75K) to travel with their spouse/significant other or with children, whilst those with lower incomes are likely to travel with friends or alone.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

Sustainability in Travel

SUSTAINABILITY IN TRAVEL

Key Findings

1. The sustainability efforts of a travel service provider or a destination are impacting travel decisions primarily for younger generations, those with higher household incomes and Italian travellers. About 6 in 10 Gen Zs (61%), Millennials (58%), Italian travellers (58%) and those making $75K+ (55%) indicate that a travel service provider's focus on sustainability impacts their travel decision-making.

2. There is opportunity for travel providers to educate consumers on ways to travel more sustainably. Only 12% of European travellers say they are "very familiar" with how to do this, and 60% say they are interested in learning more, with younger travellers expressing the most interest.

3. Bringing awareness to how eating and buying local impacts the community is a good place to start as most travellers are already doing this to some extent, and it also helps to build resident support.

4. Younger generations are more likely than older generations to support the cause with their wallets. More Gen Zs and Millennials than other generations say they are willing to pay more to patronise travel providers who are focusing on this issue. More Gen Zs and Millennials also agree that they are willing to pay an extra $100 for a flight to help reduce their carbon footprint.

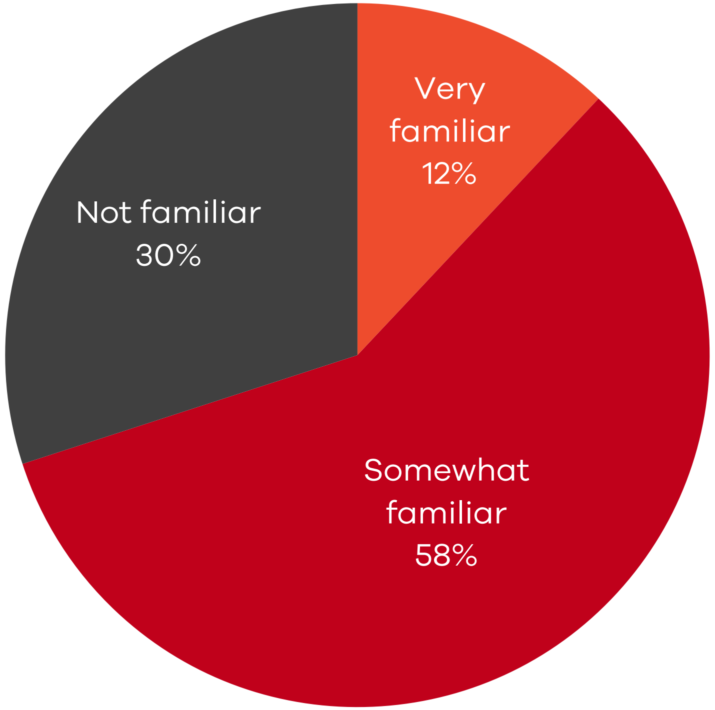
 Source: MMGY Global's 2022 *Portrait of European Travellers*™

30%

indicate that they have <u>avoided</u> a destination or transportation option because they felt that it was not committed to sustainable practices.

France	Germany	Italy	Spain	U.K.	Gen Zs	Millennials	Gen Xers	Boomers	Under $75K	$75K+
32%	30%	33%	32%	23%	43%	41%	27%	19%	25%	40%

There is an opportunity for educating travellers on sustainable travel practices.



60%

agree that they are interested in learning about ways in which they can travel more sustainably.

COUNTRY DIFFERENCES

- More travellers from France and the U.K. indicate they are not familiar with sustainable travel practices, while Italian travellers are the most open to learning about ways to travel more sustainably.

GENERATIONAL DIFFERENCES

- Younger generations are more likely than older generations to be familiar with ways to travel sustainably, and they are also more open to learning even more about it.

INCOME DIFFERENCES

- Higher-income travellers ($75K+) are more likely to be familiar with sustainable travel, but the desire for learning more is similar across all income groups.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

48%

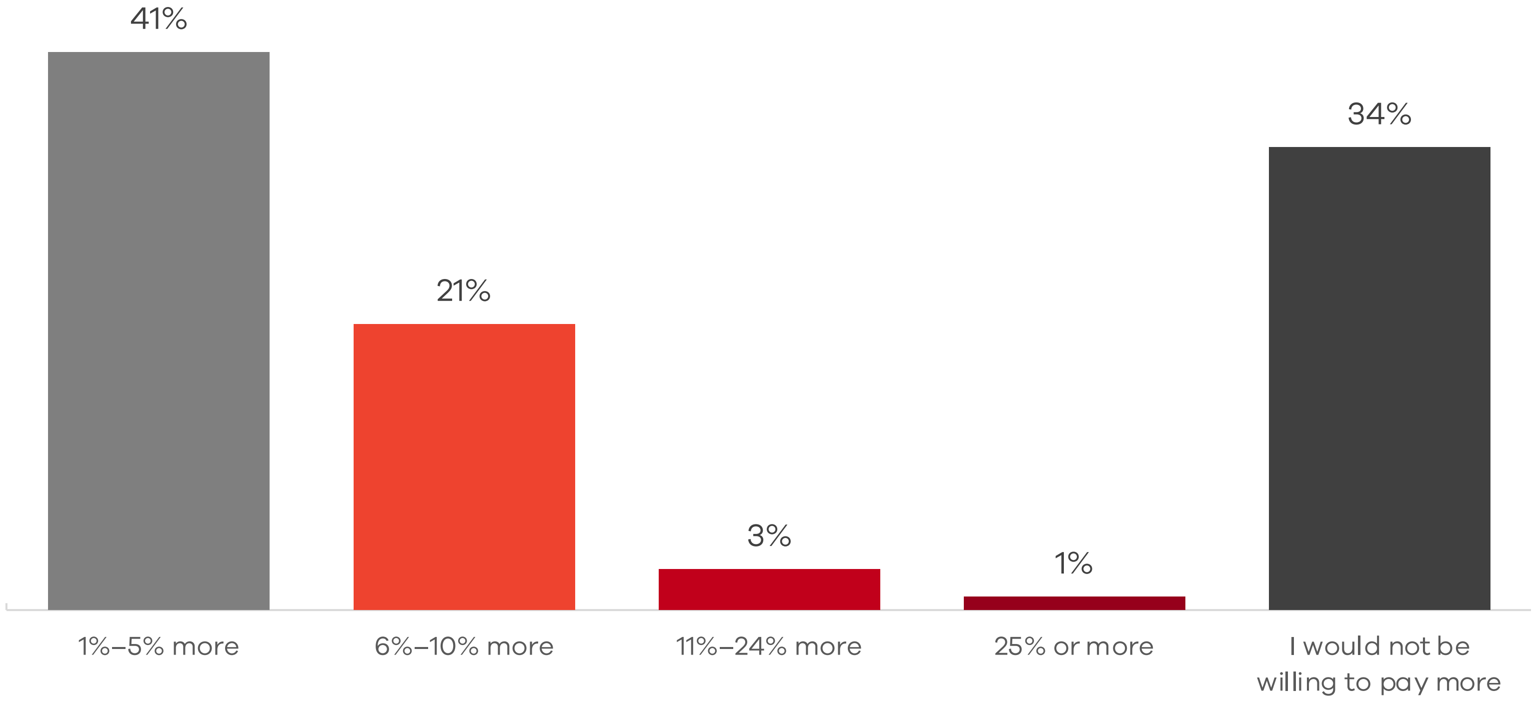
indicate that a travel provider's focus on sustainability and environmental considerations impacts their travel decision-making.

France	Germany	Italy	Spain	U.K.	Gen Zs	Millennials	Gen Xers	Boomers	Under $75K	$75K+
50%	45%	58%	48%	40%	61%	58%	45%	38%	45%	55%

MMGY Travel Intelligence

Two-thirds are willing to pay a higher rate to support providers who demonstrate environmental responsibility.

Willingness to Pay a Higher Rate to Patronise Travel Providers Who Demonstrate Environmental Responsibility



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Amongst travellers who are willing to pay more, the majority (93%) is willing to pay a maximum of 10% more.

COUNTRY DIFFERENCES

- Travellers from Germany and Italy are more willing to pay extra to patronise an environmentally responsible travel service provider compared to travellers from the other countries.

GENERATIONAL DIFFERENCES

- Younger generations are more willing to pay extra compared to older generations.

INCOME DIFFERENCES

- Those with higher household incomes ($75K+) are more willing to pay extra than those making less (<$75K).

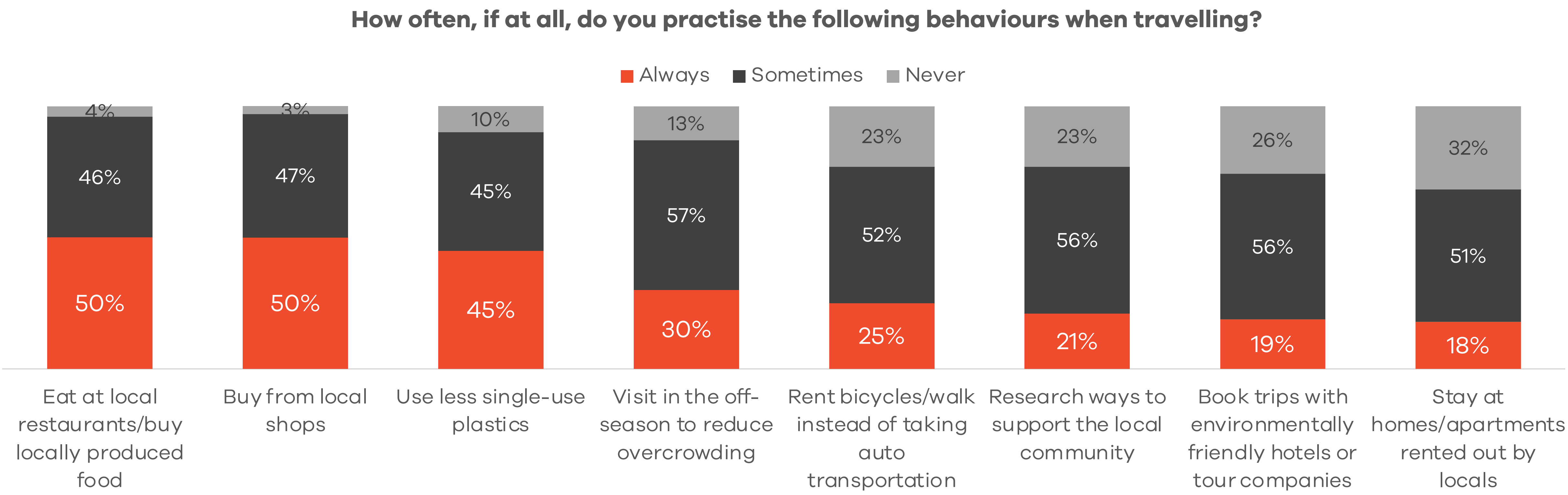
MMGY Travel Intelligence

29%

agree that they would be willing to pay an extra £/€100 for a flight to help reduce their carbon footprint.

France	Germany	Italy	Spain	U.K.	Gen Zs	Millennials	Gen Xers	Boomers	Under $75K	$75K+
29%	28%	34%	28%	26%	36%	36%	28%	22%	25%	38%

Sustainable Behaviours Whilst Travelling



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

Cruising

CRUISING

Key Findings

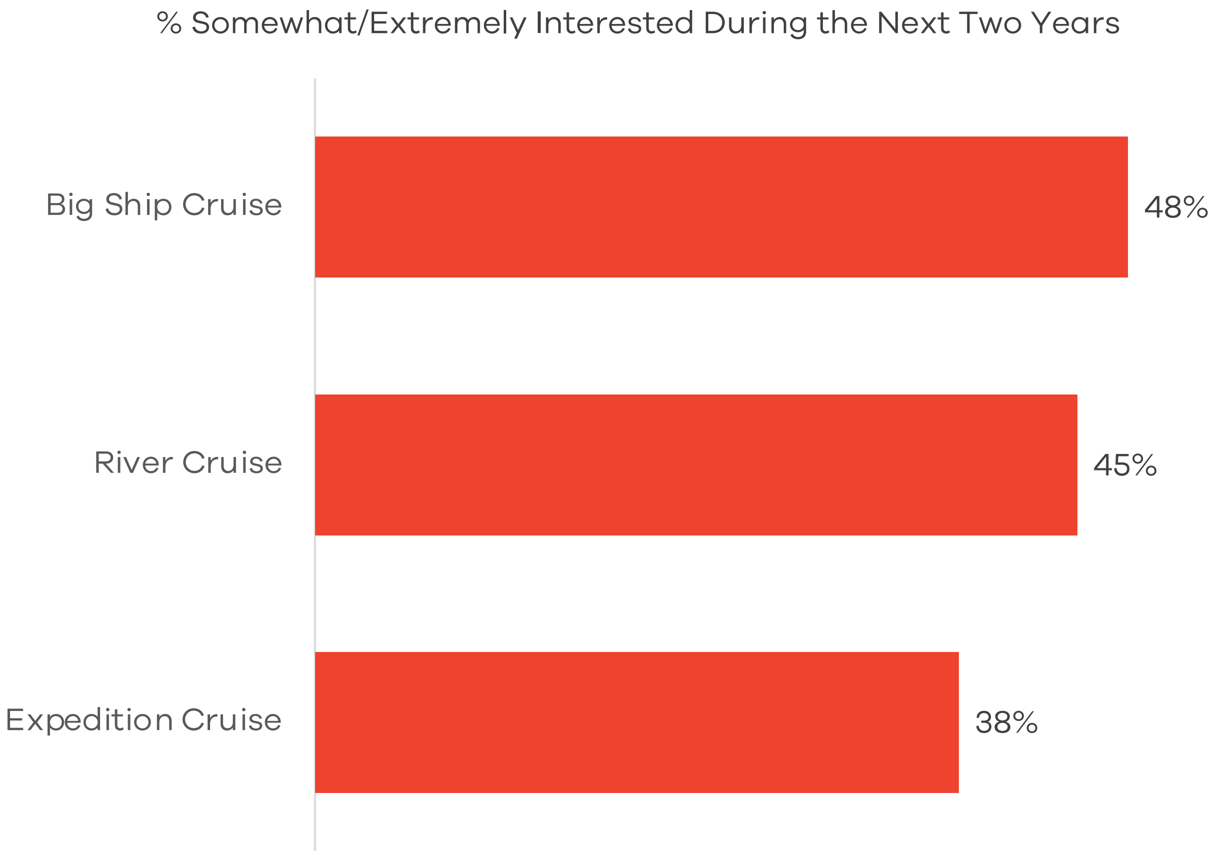
1. A similar percentage of European travellers are interested in taking big ship and river cruises.

2. Millennials and travellers with household incomes of $250K+ express the most interest in all types of cruises.

3. European and Caribbean cruises are by far the most popular, followed closely by cruises in the Mediterranean.

 Source: MMGY Global's 2022 *Portrait of European Travellers*™

Nearly half of European travellers are interested in taking both a big ship cruise and a river cruise.



COUNTRY DIFFERENCES

- Italian and Spanish travellers are most interested in taking a big ship cruise, whilst French travellers are most interested in taking a river cruise.

GENERATIONAL DIFFERENCES

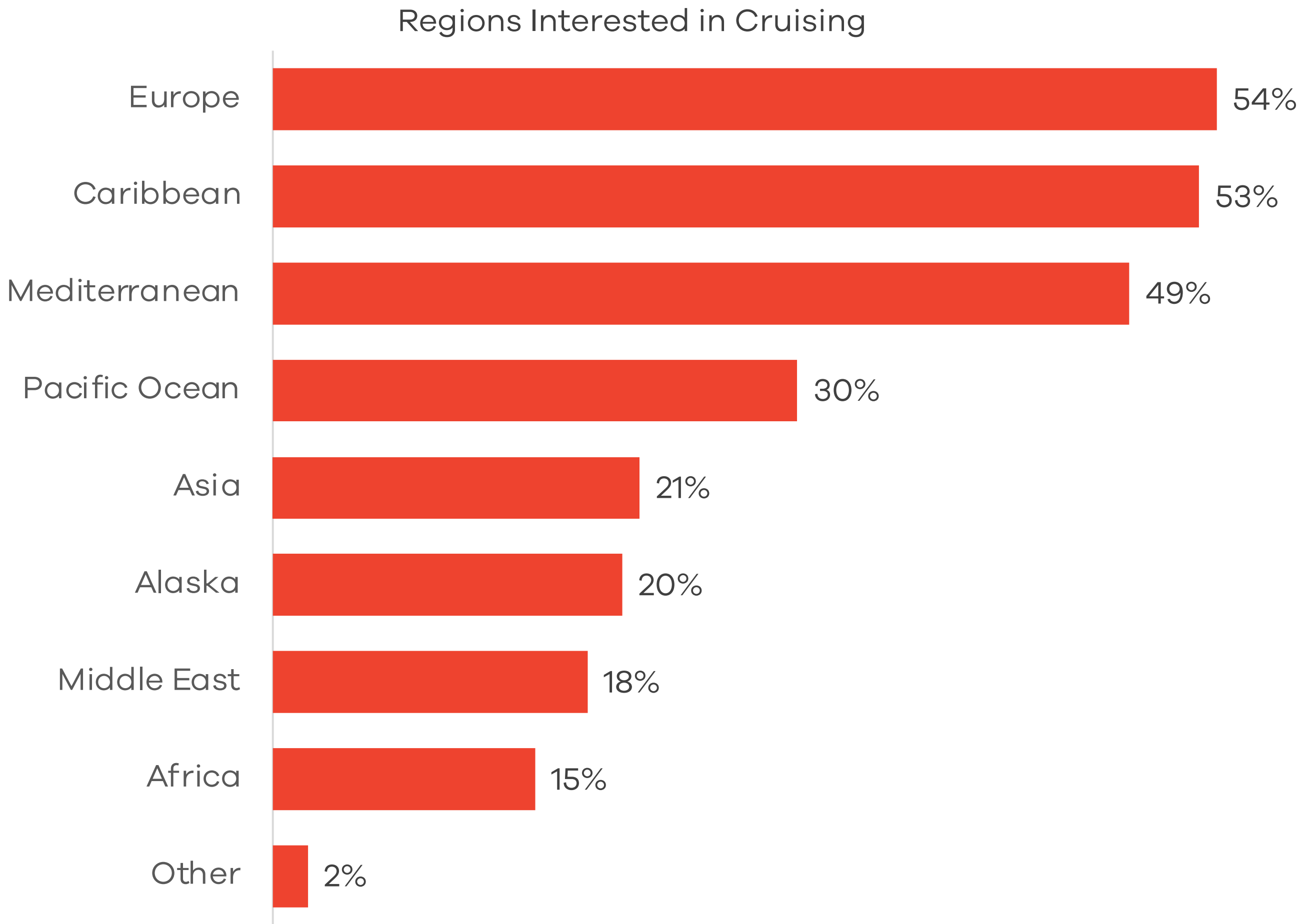
- Millennials display the highest interest for each type of cruise.

INCOME DIFFERENCES

- More higher-income travellers ($75K+) express interest in taking each type of cruise.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Regions in Europe, the Caribbean and the Mediterranean garner the most interest from cruisers.



Base: European travellers interested in taking a cruise (n=2,636)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Travel Advisors

TRAVEL ADVISORS

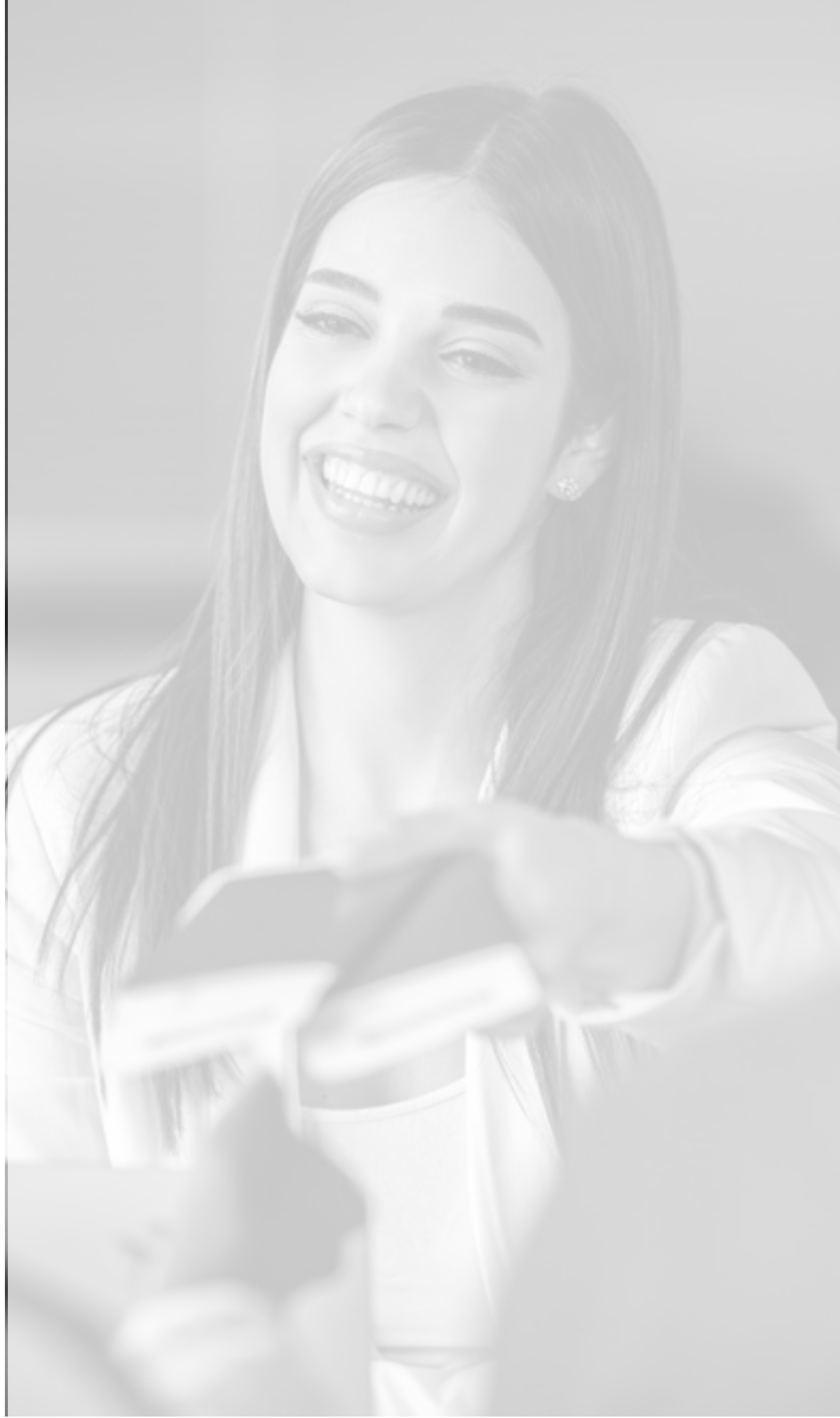
Key Findings

1. Nearly half of European travellers are planning to use a traditional travel advisor for an international holiday during the next 12 months – a similar percentage to those who indicated they have used a traditional travel advisor during the past three years.

2. The likelihood to use a travel advisor during the next 12 months increases with household income.

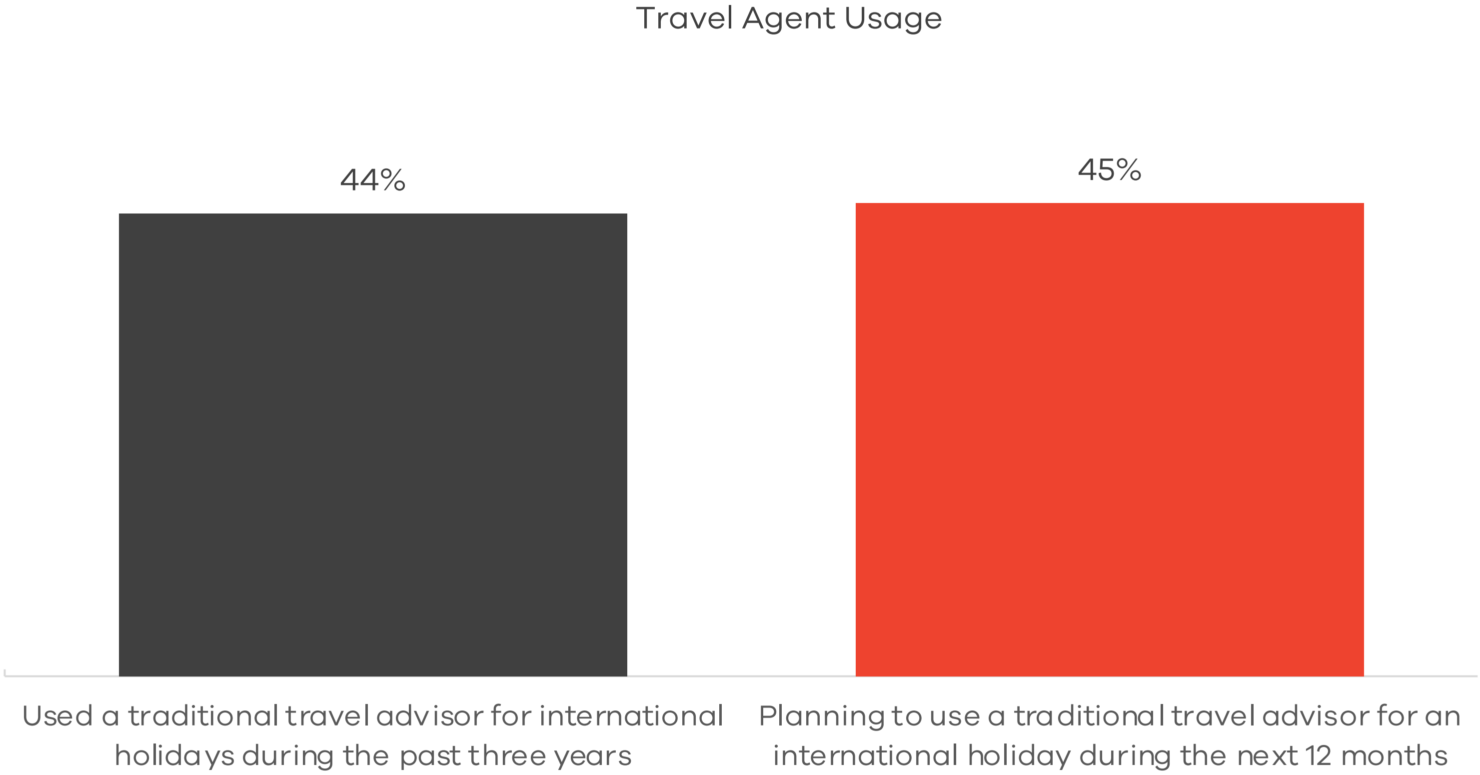
3. Spanish travellers are most likely to use a travel advisor during the next 12 months. This is followed by French travellers – and both Spanish and French travellers are more likely to use a travel advisor than travellers from the remaining countries.

4. European travellers are most likely to use a travel advisor to book holidays with complex itineraries. This is followed by using a travel advisor to plan multicity holidays, to get access to activities or places they cannot get to on their own, or to confirm bookings.



 Source: MMGY Global's 2022 *Portrait of European Travellers*™

Nearly half of European travellers are planning to use a traditional travel agent for their international holidays during the next 12 months.



COUNTRY DIFFERENCES

- Spanish travellers are most likely to use a travel advisor during the next 12 months. This is followed by French travellers – and both Spanish and French travellers are more likely to use a travel advisor than travellers from the remaining countries.

INCOME DIFFERENCES

- Travellers with higher household incomes ($125K+) are more likely than lower-income households to use a travel advisor during the next 12 months.

Base: European travellers (n=4,019)

Source: MMGY Global's 2022 *Portrait of European Travellers*™

Travellers are most likely to use a travel advisor to help with complex itineraries.

Situations in Which Travellers Would Consider Using a Travel Advisor	
Complex itineraries	33%
Planning multicity holidays	24%
To get access to activities/places I cannot get to on my own	23%
To confirm bookings	22%
For the ability to make changes, cancellations, etc.	21%
Expensive holidays	21%
Planning a multiday tour	19%
Organising a group holiday (e.g., extended family get-together)	17%
Planning special occasion holidays (e.g., anniversaries, honeymoons)	16%
For education on the latest intel on a destination	16%
Perceived language barriers	13%
Special interest trips (e.g., photography, bird-watching, sports)	12%
Planning a day tour	12%
None of the above	19%

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

See page 63 for details.

MMGY Travel Intelligence

Each country has a different secondary reason as to why they would use a travel advisor.

The number one situation for each country is shaded in red, while the remaining of the top three are shaded in black.

Situations in Which Travellers Would Consider Using a Travel Advisor	France	Germany	Italy	Spain	U.K.
Complex itineraries	28%	30%	39%	39%	27%
Planning multicity holidays	24%	21%	21%	31%	22%
To get access to activities/places I cannot get to on my own	19%	23%	28%	23%	21%
To confirm bookings	27%	21%	17%	25%	21%
For the ability to make changes, cancellations, etc.	17%	19%	23%	27%	20%
Expensive holidays	16%	21%	19%	22%	26%
Planning a multiday tour	19%	17%	24%	20%	15%
Organising a group holiday (e.g., extended family get-together)	16%	12%	17%	24%	16%
Planning special occasion holidays (e.g., anniversaries, honeymoons)	13%	12%	17%	22%	15%
For education on the latest intel on a destination	18%	22%	9%	20%	9%
Perceived language barriers	15%	10%	15%	17%	9%
Special interest trips (e.g., photography, bird-watching, sports)	11%	13%	11%	14%	12%
Planning a day tour	15%	11%	10%	12%	11%
None of the above	19%	23%	15%	13%	26%

Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

While complex itineraries is the top reason to use a travel advisor for travellers from each country, their secondary reasons differ:

- French travellers would do so to confirm booking.
- German and Italian travellers would do so to get access to activities or places they cannot get to on their own.
- Spanish travellers would do so to plan a multicity holiday.
- British travellers would do so for expensive holidays.

MMGY Travel Intelligence

Organised Group Tours

ORGANISED GROUP TOURS

Key Findings

1. One-third of European travellers are likely to take a multiday, organised group tour in the next 12 months. Likelihood is highest amongst Italian and Spanish travellers, Gen Zs, Millennials and those with a household income of $125K or more.

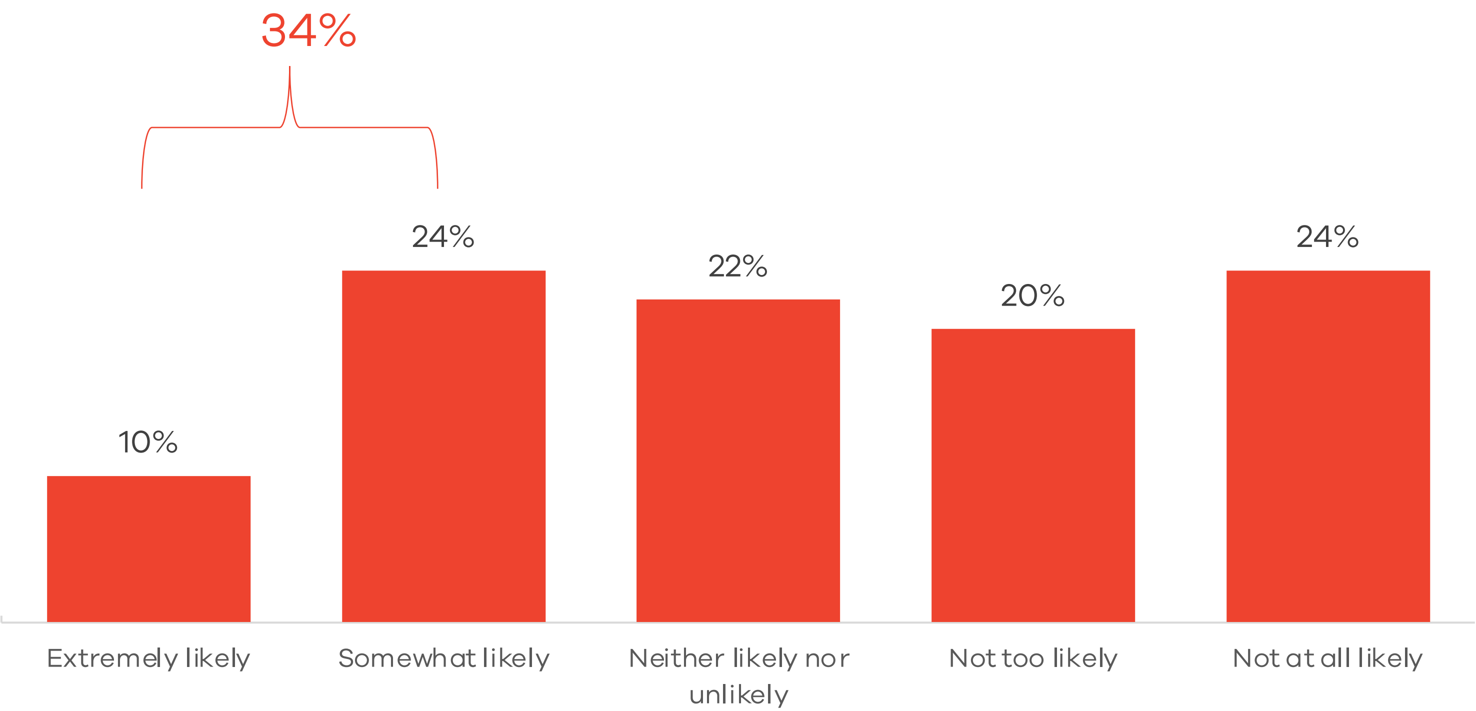
2. Whilst European travellers are most influenced to take an organised group tour in order to see multiple sites on one trip and to take the planning off their plate, many are also influenced by the destination and feel that group tours provide the security to travel to foreign places they would be wary to visit on their own.

3. When planning an organised group tour, travellers are most likely to choose a destination first and then search for tour companies. Travel review sites and online travel agencies are the top sources used to research tour companies, and travellers prefer to see all-inclusive costs.

 Source: MMGY Global's 2022 *Portrait of European Travellers*™

One-third of European travellers are likely to take an organised group tour whilst travelling internationally during the next 12 months.

Likelihood to Take a Holiday as Part of a Multiday Organised Group Tour Whilst Travelling Internationally During the Next 12 Months



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

- Italian and Spanish travellers are most likely to indicate they will take a multiday group tour during the next 12 months.

GENERATIONAL DIFFERENCES

- Gen Zs and Millennials are the generations most likely to indicate they will take a multiday group tour during the next 12 months.

INCOME DIFFERENCES

- Likelihood to take a multiday group tour increases with household income.

MMGY Travel Intelligence

Four in 10 European travellers consider travelling with a tour company because of their knowledge of the destinations and for a better price for the total holiday experience.

Base: European travellers who have taken or are likely to take a group tour (n=1,527)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

- The safety aspect is the top reason travellers from Italy would consider travelling with a tour company, whilst those from Germany, Spain and the U.K. would do so for the tour operator's knowledge of the destination. Those from France are doing so for better prices for the total experience.

GENERATIONAL DIFFERENCES

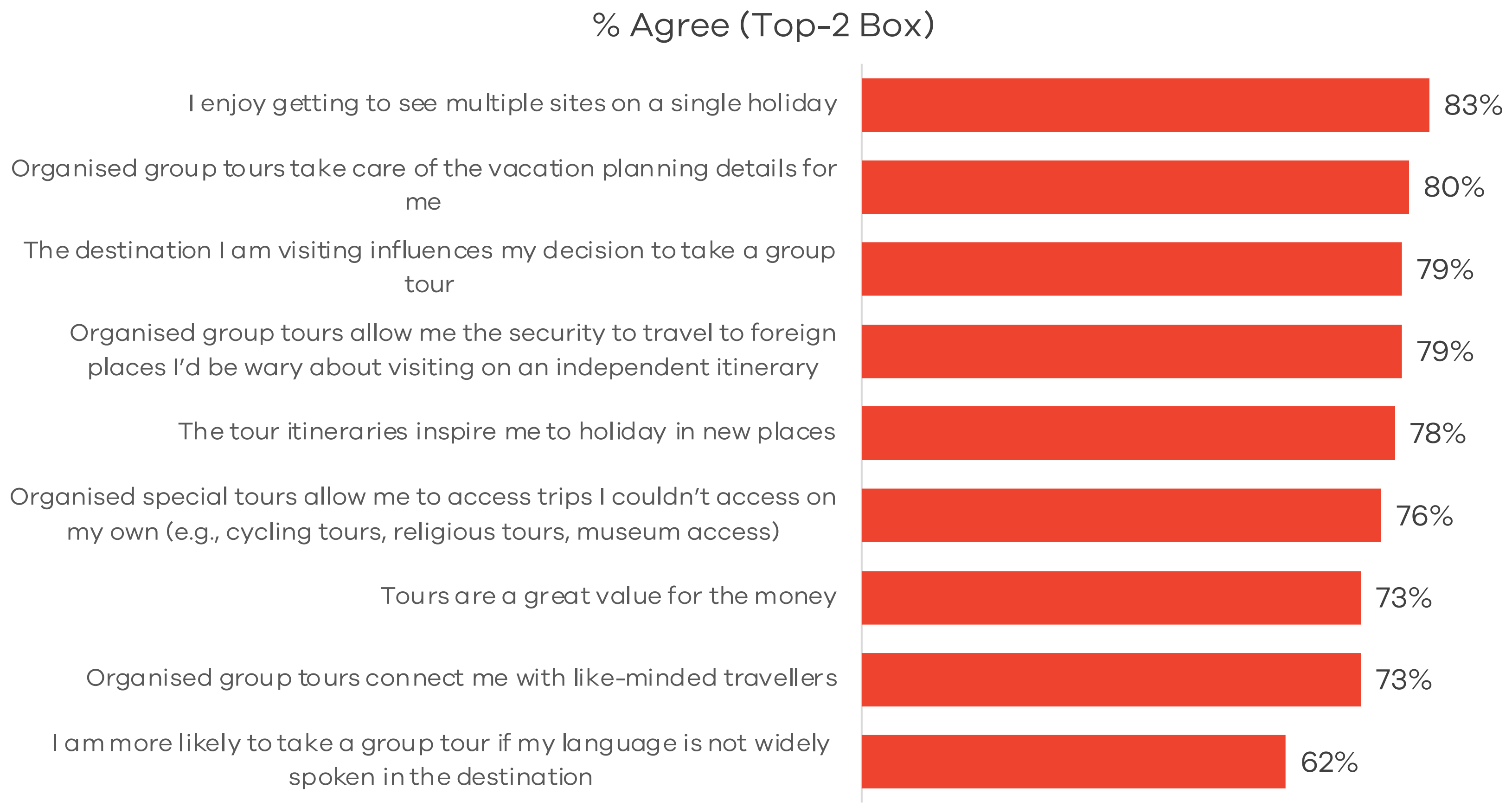
- Millennials and Boomers consider travelling with a tour company for better prices for the total holiday, whilst Gen Zs believe they'll provide an extra level of service if things go wrong, and Gen Xers would consider for their knowledge of the destinations.

INCOME DIFFERENCES

- Those making <$125K consider travelling with a tour company for their knowledge of destinations, whilst those making $125K+ believe they would see more with the tour company than they would on their own.

MMGY Travel Intelligence

The decision to take a group tour is influenced by getting to see multiple sites on a single holiday, planning details being taken care of, the destination and added security.



Base: European travellers who have taken or are likely to take a group tour (n=1,527)

Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

European travellers are using travel review sites and online travel agencies to research tour companies.

Sources Considered When Researching Tour Companies	
Travel review sites (e.g., Tripadvisor)	44%
Online travel agencies (e.g., Expedia)	43%
Travel advisors	41%
The company's own website	37%
Friends/family	32%
Destination websites (e.g., Visit London)	29%
Other	1%

COUNTRY DIFFERENCES

- Travellers from Italy, Spain and the U.K. are turning to travel review sites, whilst those from France and Germany are most likely to use online travel agencies.

GENERATIONAL DIFFERENCES

- Gen Xers and Boomers are more likely than younger generations to use travel advisors to research tour companies.

Base: European travellers who have taken or are likely to take a group tour (n=1,527)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

These factors are about equally influential when choosing a tour company.

Influential When Choosing a Tour Company *Amongst those likely to take a group tour*	
Reputation of the company	86%
Departure dates that suit me	86%
Value for the price	85%
Convenient communication with the company	84%
Range of itineraries	84%

Base: European travellers who have taken or are likely to take a group tour (n=1,527)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

GENERATIONAL DIFFERENCES

- Value for the price is the most influential factor for Boomers, followed by a range of itineraries. Younger generations are more focused on reputation of the tour company and suitable departure dates.

INCOME DIFFERENCES

- Value for the price is the most influential factor for travellers making less than $75K, whilst those making more than $75K are more focused on the reputation of the tour company and suitable departure dates.

Organised Group Tour Preferences

Planning Group Tours	
Do First	
Choose a destination and see what companies go there	72%
Choose a company and see what destinations they offer	28%
Pricing Preferences	
Prefer to see all-inclusive costs	65%
Prefer to see separate land and air costs	35%
Maximum Number of Fellow Passengers Would Want on an Organised Group Tour	
Fewer than 20	52%
20–30	28%
31–40	11%
41 or more	2%
It doesn't matter	7%

Base: European travellers who have taken or are likely to take a group tour (n=1,527)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Flight Preferences

MMGY Travel Intelligence

FLIGHT PREFERENCES

Key Findings

1. Flying economy accounts for the largest share of international flights (73%). This is followed by premium economy (16%), which is highest amongst French and Italian travellers compared to travellers from other countries of origin. Millennials are also more likely than other generations to fly premium economy when travelling internationally.

2. Booking on an airline's website is the most popular method for booking international flights for European travellers, followed by booking through an OTA. British and Spanish travellers are most likely to book through the airline's website, whilst German travellers are most likely to book through an OTA.

Source: MMGY Global's 2022 *Portrait of European Travellers*™

Three-quarters of European travellers are flying economy when travelling internationally.

Percentage of International Flights Flown	
Economy	73%
Premium economy	16%
Business	7%
First class	3%

COUNTRY DIFFERENCES

- More travellers from France and Italy than the remaining origin countries fly premium economy when travelling internationally.

GENERATIONAL DIFFERENCES

- Millennials are more likely than other generations to fly premium economy when travelling internationally.

Base: European travellers (n=4,019)

Source: MMGY Global's 2022 *Portrait of European Travellers*™

Airline websites and online travel agencies are the most used methods for booking international flights with just slightly more respondents choosing airline websites.

Typical Method of Booking International Flights	
Through the airline's website	31%
Through an online travel agency	26%
Through a traditional travel advisor	17%
Through the airline's app	13%
Through a third-party reseller	7%
Calling the airline directly	4%
Other	2%

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

COUNTRY DIFFERENCES

- More travellers in Spain and the U.K. prefer to book through the airline website, whilst more travellers in Germany prefer to book through an OTA.

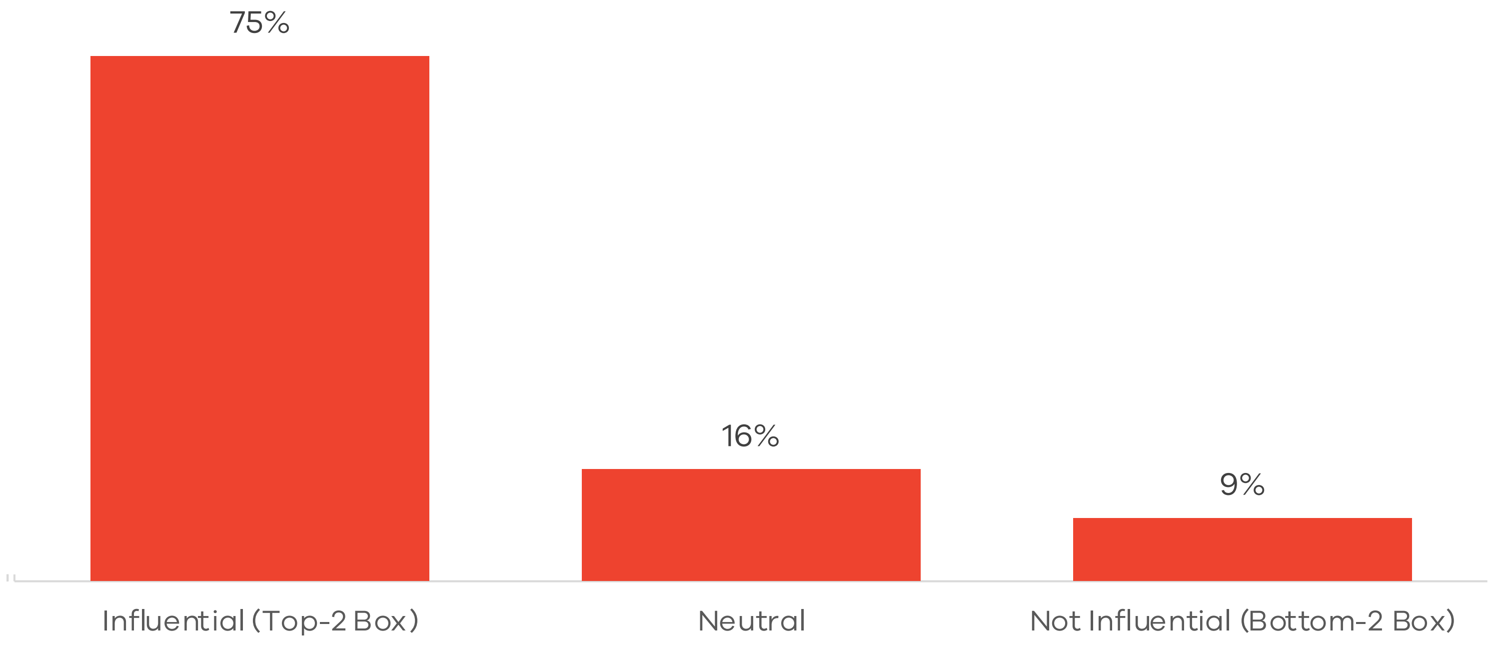
GENERATIONAL DIFFERENCES

- Boomers are more likely to book through the airline's website, whilst Millennials are more likely to book through an OTA or through the airline's app.

MMGY Travel Intelligence

Cost of airfare is influential when selecting a destination.

Extent to Which Cost of Airfare Influences International Destination Selection



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

COUNTRY DIFFERENCES

- More travellers from Spain, Italy and France than Germany and the U.K. are influenced by the cost of airfare when selecting an international travel destination.

GENERATIONAL DIFFERENCES

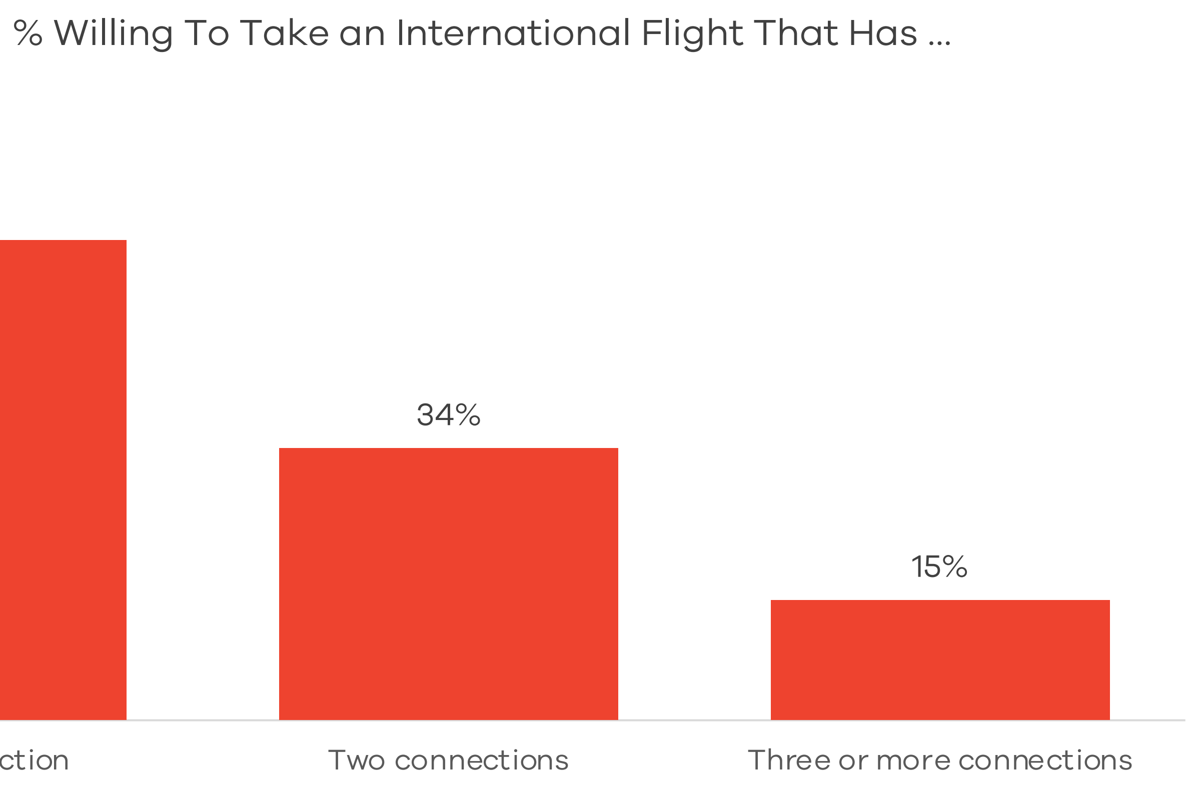
- More Millennials and Gen Xers than the remaining generations are influenced by the cost of airfare.

INCOME DIFFERENCES

- More travellers with lower household incomes are influenced by the cost of airfare.

MMGY Travel Intelligence

Six in 10 European travellers are willing to take an international flight that has at least one connection.



COUNTRY DIFFERENCES

- More travellers from Spain, Italy and the U.K. than France and Germany are willing to take an international flight that has at least one connection.

GENERATIONAL DIFFERENCES

- Boomers are the least willing to take an international flight with at least one connection.

INCOME DIFFERENCES

- More travellers with higher household incomes than those with lower incomes are willing to take a flight with at least one connection.

Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

International Business Travel

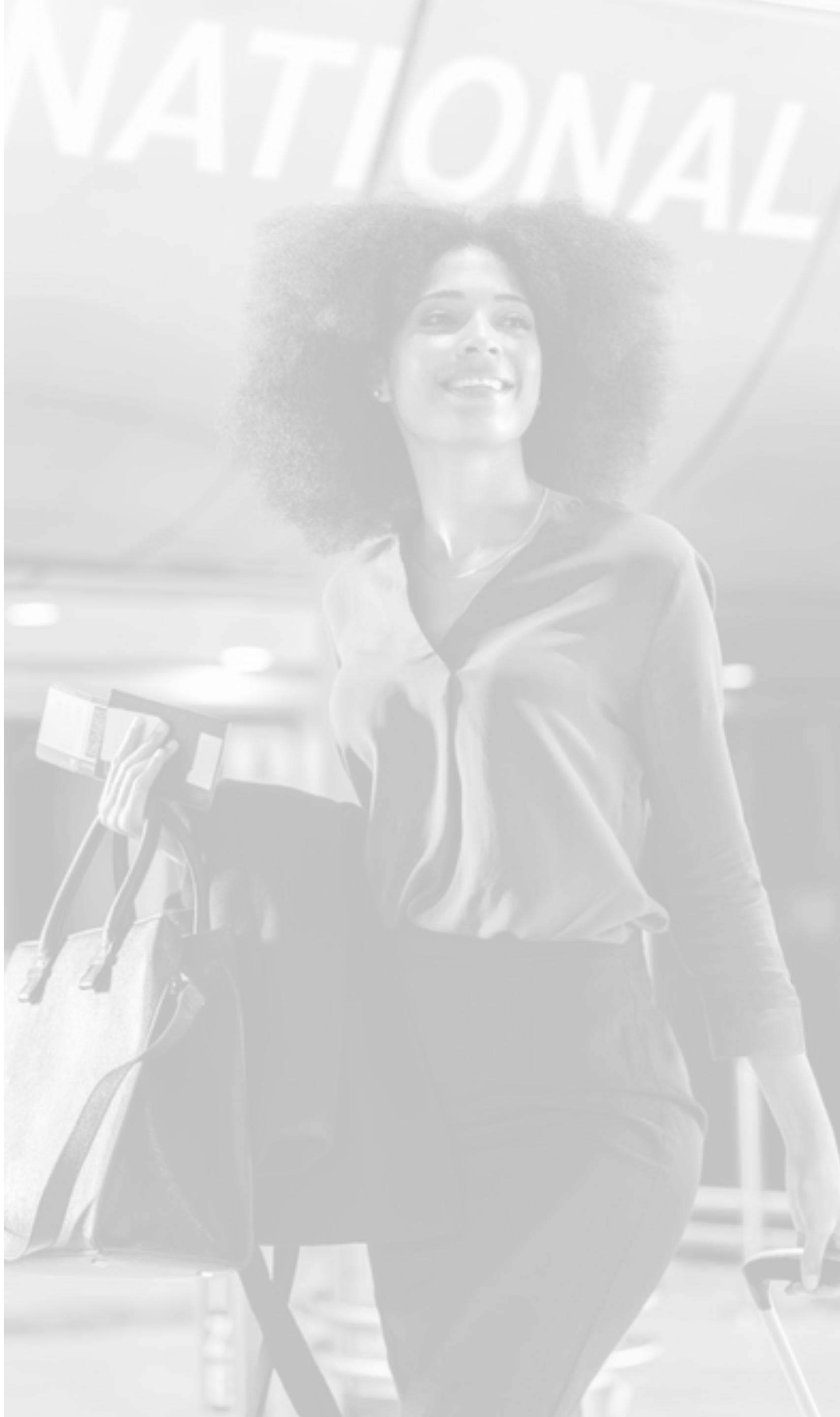
MMGY Travel Intelligence

INTERNATIONAL BUSINESS TRAVEL

Key Findings

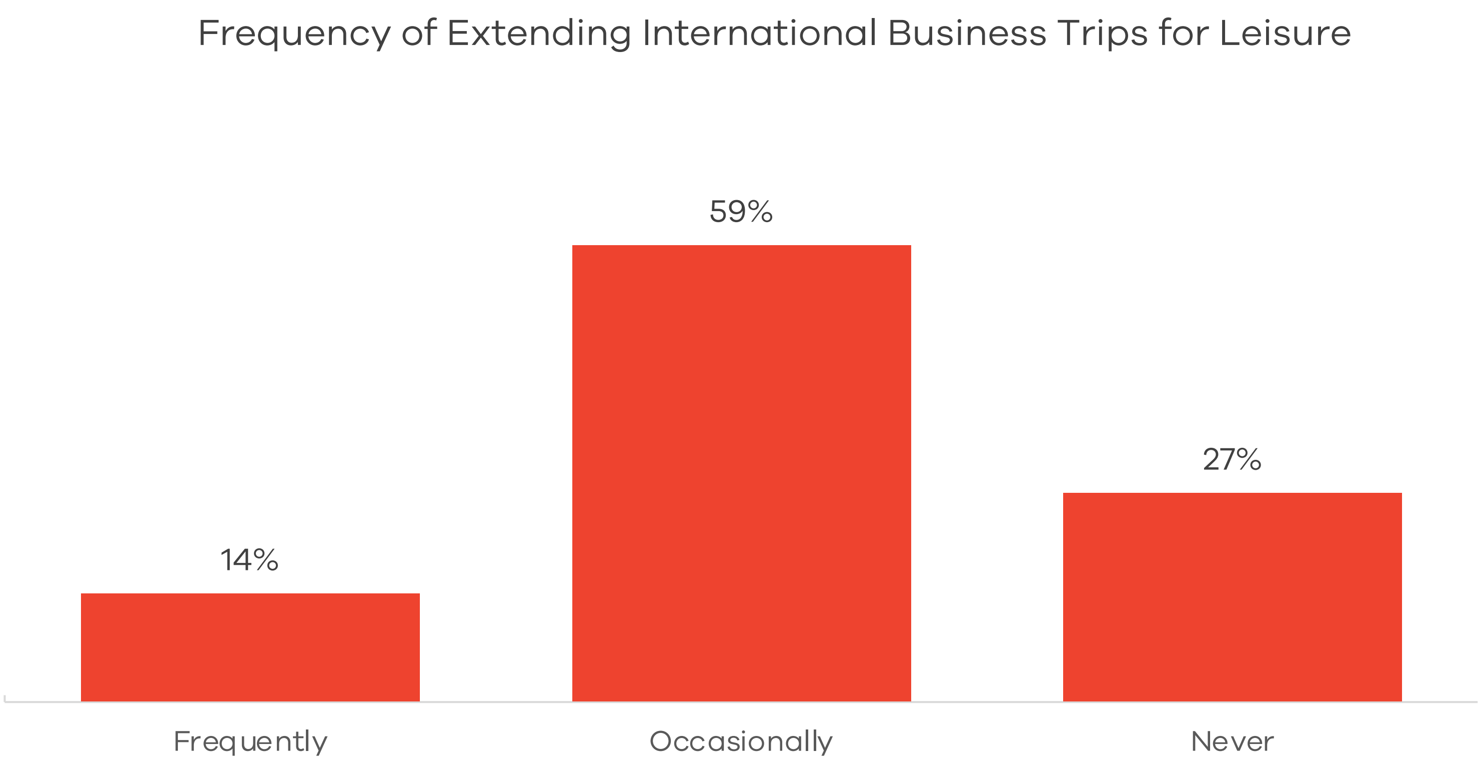
1. Three-quarters (73%) of European international business travellers indicate that they occasionally or frequently extend their international business trip for leisure purposes. On average, they will extend their trip for 3.6 days.

2. The activities that the destination has to offer and the cost of accommodations are the most influential factors when a traveller is deciding whether to extend their business trip for leisure. There are also top influencers when deciding whether or not to have friends or family join them.



 Source: MMGY Global's 2022 *Portrait of European Travellers*™

Three-quarters of European international business travellers have extended these trips for leisure.



COUNTRY DIFFERENCES

- More British travellers than travellers from the other countries of origin indicate they "frequently" extend international business trips for leisure.

GENERATIONAL DIFFERENCES

- More Gen Zs and Millennials than older generations have extended their business trips for leisure.

INCOME DIFFERENCES

- More higher-income travellers ($125K+) than lower-income travellers (<$125K) indicate that they "frequently" extend their business trips for leisure.

Base: European international business travellers (n=840)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

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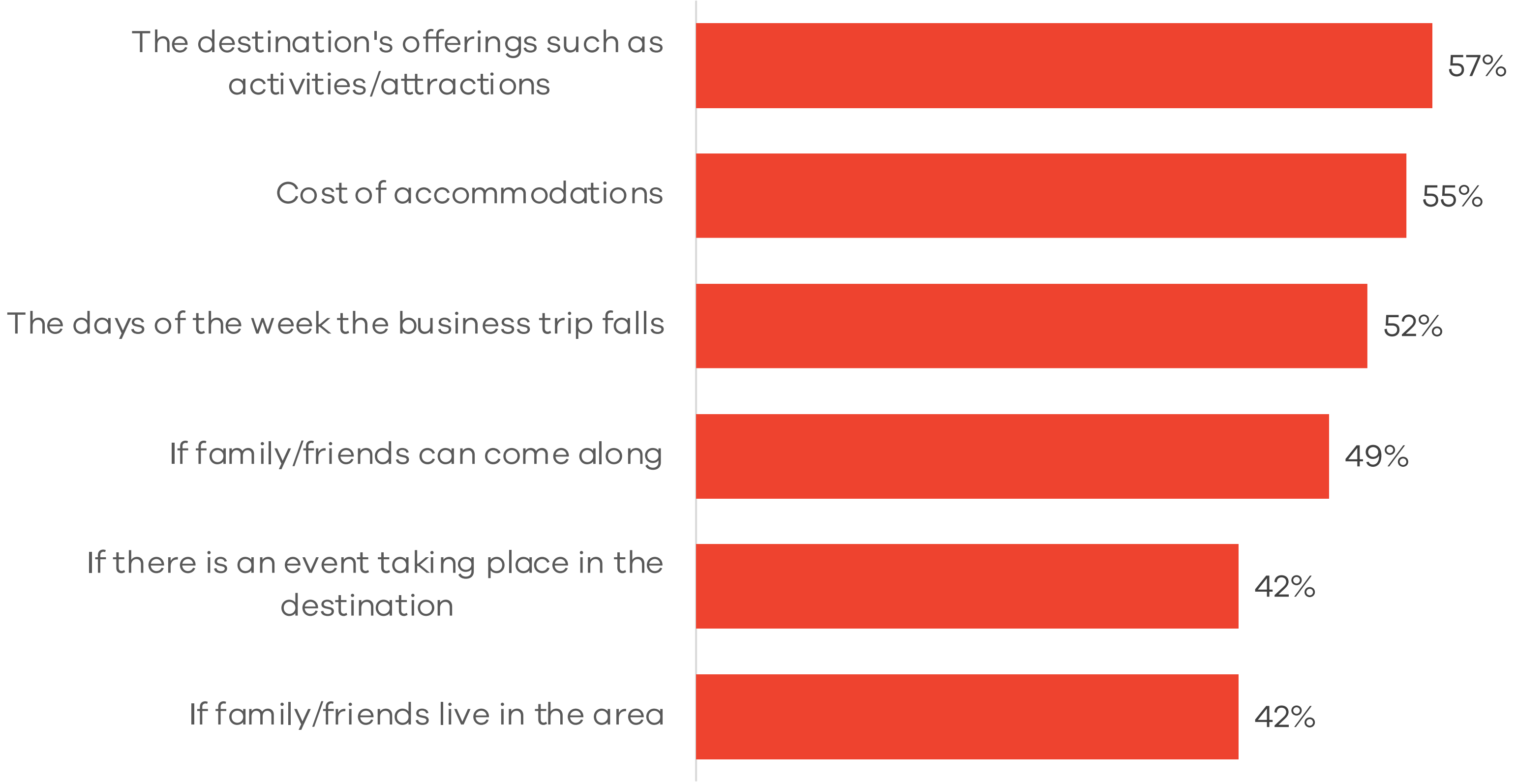
The activities available in the destination and cost of accommodations are the most influential when deciding to extend a business trip.

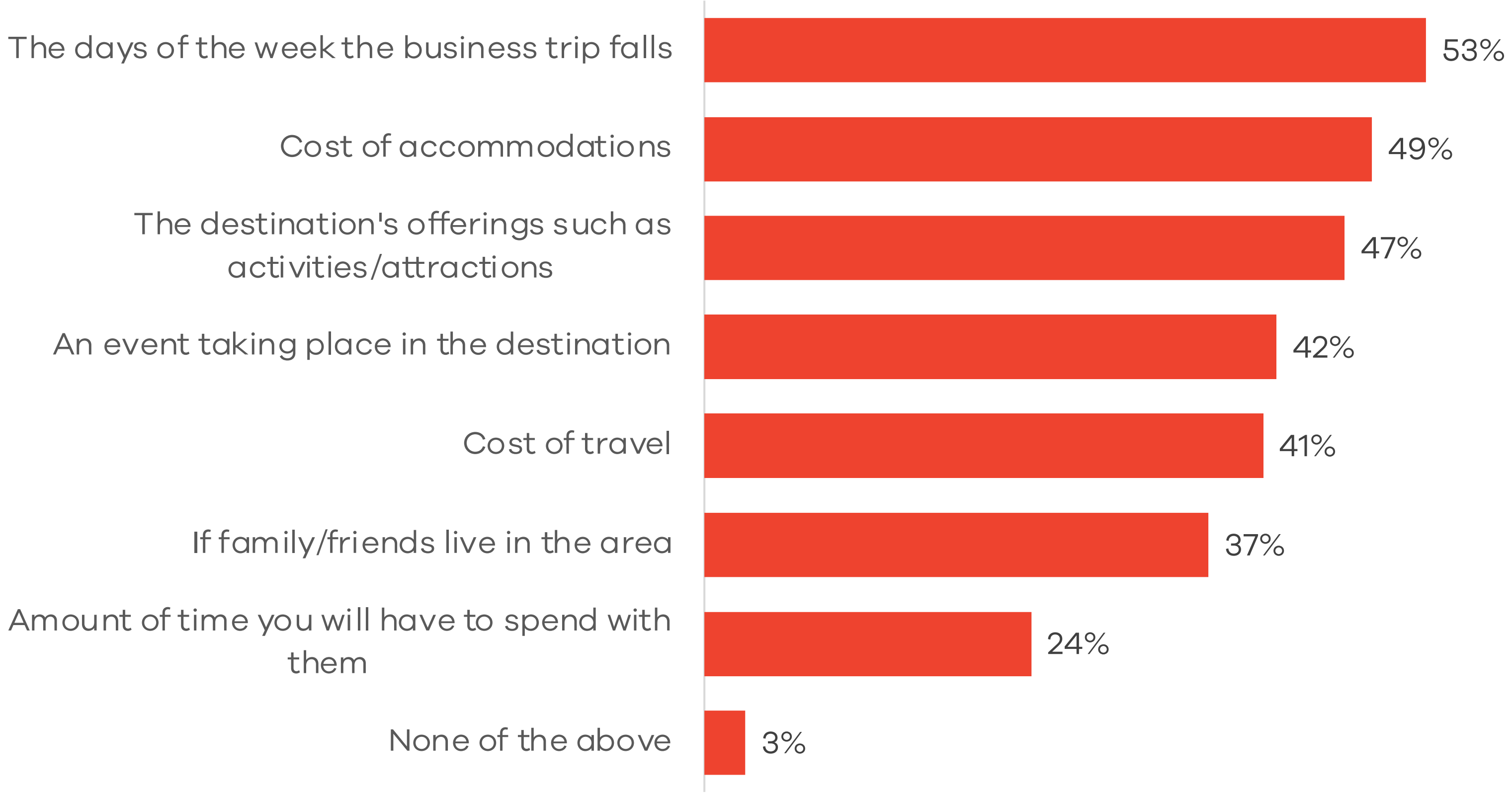
Influential When Deciding to Extend Business for Leisure



Base: European international business travellers who extend for leisure (n=612)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

When deciding to have friends or family join, the days of the week the business trip falls is the number one influence.

Influential When Deciding to Have Family/Friends Join



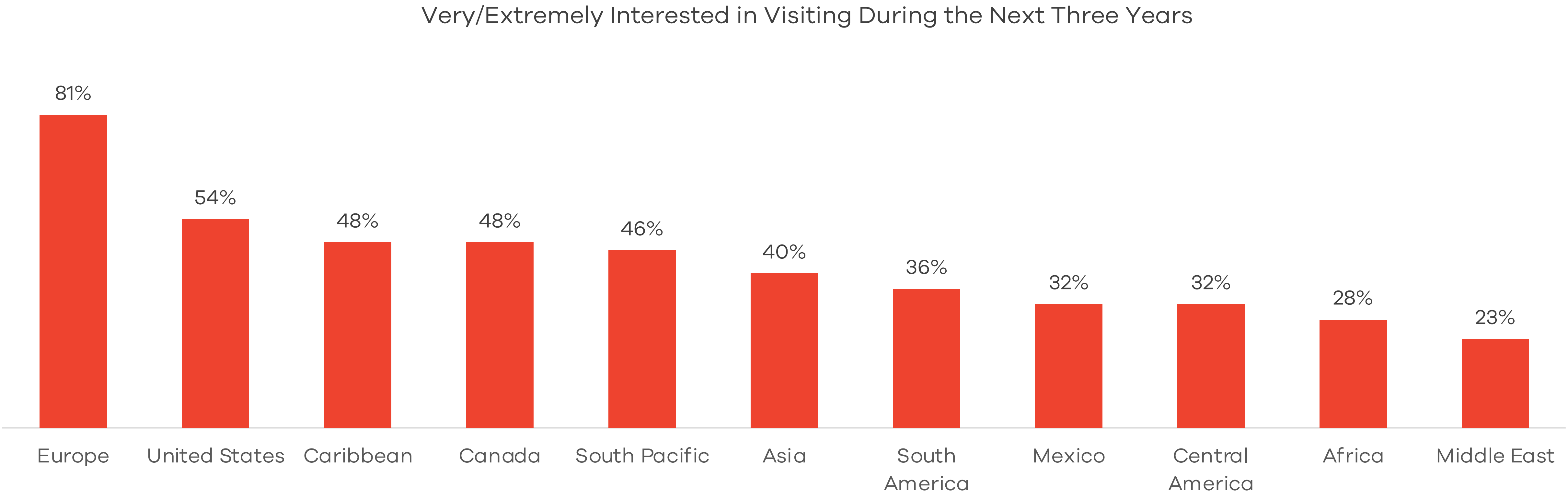
More than 8 in 10 European international business travellers (84%) will have family or friends accompany them on business trips at least occasionally or frequently. This is highest amongst German and British travellers and those making $125K+.

Base: European international business travellers who extend for leisure (n=612)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

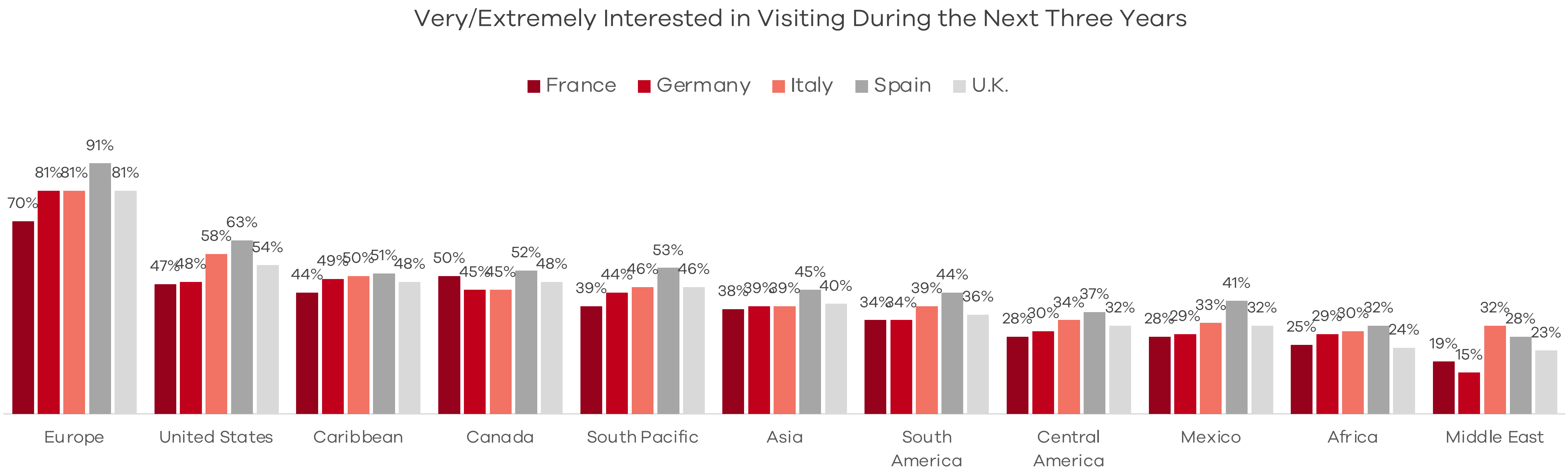
Interest in Destinations

European travellers are most interested in visiting other places in Europe during the next three years, followed by the United States, the Caribbean and Canada.



Base: European travellers (n=4,019)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

More Spanish travellers are interested in visiting nearly all destinations than travellers from the remaining countries.



Base: European travellers (France: n=800; Germany: n=800; Italy: n=800; Spain: n=805; U.K.: n=814)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

European Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting Europe	
Italy	50%
Spain	48%
France	41%
Greece	41%
Portugal	38%
England	34%
Germany	31%
Scotland	28%
Ireland	27%
Norway	26%
The Netherlands	26%
Croatia	25%
Iceland	24%

Asked amongst travellers interested in visiting Europe (Continued)	
Switzerland	23%
Sweden	22%
Austria	22%
Turkey	21%
Denmark	19%
Finland	19%
Eastern Europe (Bulgaria, Czech Republic, Hungary, Poland, Romania, Slovakia)	18%
Malta	18%
Belgium	16%
Baltic region (Estonia, Latvia, Lithuania)	10%
Russia	5%
Other	3%

Base: European travellers interested in visiting Europe (n=3,864)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

U.S. Destinations of Interest During the Next Three Years

Asked amongst travellers interested in visiting the United States	
New York City	57%
Los Angeles	45%
San Francisco	45%
Miami	42%
Las Vegas	36%
Washington, D.C.	28%
Orlando	27%
Honolulu	25%
New Orleans	25%
Florida Keys/Key West	24%

Asked amongst travellers interested in visiting the United States (Continued)	
Chicago	23%
San Diego	22%
Boston	21%
Philadelphia	16%
Denver	14%
Nashville	12%
Ft. Myers/Sanibel/Captiva	8%
Other	5%

Base: European travellers interested in visiting the United States (n=3,115)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

South Pacific Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting the South Pacific	
Australia	66%
New Zealand	64%
Tahiti	34%
Fiji	30%
Papua New Guinea	19%
Cook Islands	16%
Other	4%

Note: Papua New Guinea was asked to both those interested in Asia and the South Pacific
Base: European travellers interested in visiting the South Pacific (n=2,873)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Caribbean Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting the Caribbean	
The Bahamas	44%
Cuba	44%
Jamaica	38%
Dominican Republic	37%
Barbados	30%
Puerto Rico	28%
Bermuda	23%
Cayman Islands	20%
St. Maarten/St. Martin	19%
British Virgin Islands	15%
Antigua	15%
Dominica	15%
U.S. Virgin Islands	14%
Aruba	13%
Other	5%

Base: European travellers interested in visiting the Caribbean (n=3,037)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Canadian Provinces of Interest During the Next Three Years

Asked amongst travellers interested in visiting Canada	
Québec	56%
Ontario	48%
British Columbia	38%
Nova Scotia	21%
Newfoundland and Labrador	21%
Alberta	13%
Prince Edward Island	12%
Manitoba	9%
Saskatchewan	8%
New Brunswick	8%
Other	6%

Base: European travellers interested in visiting Canada (n=3,061)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

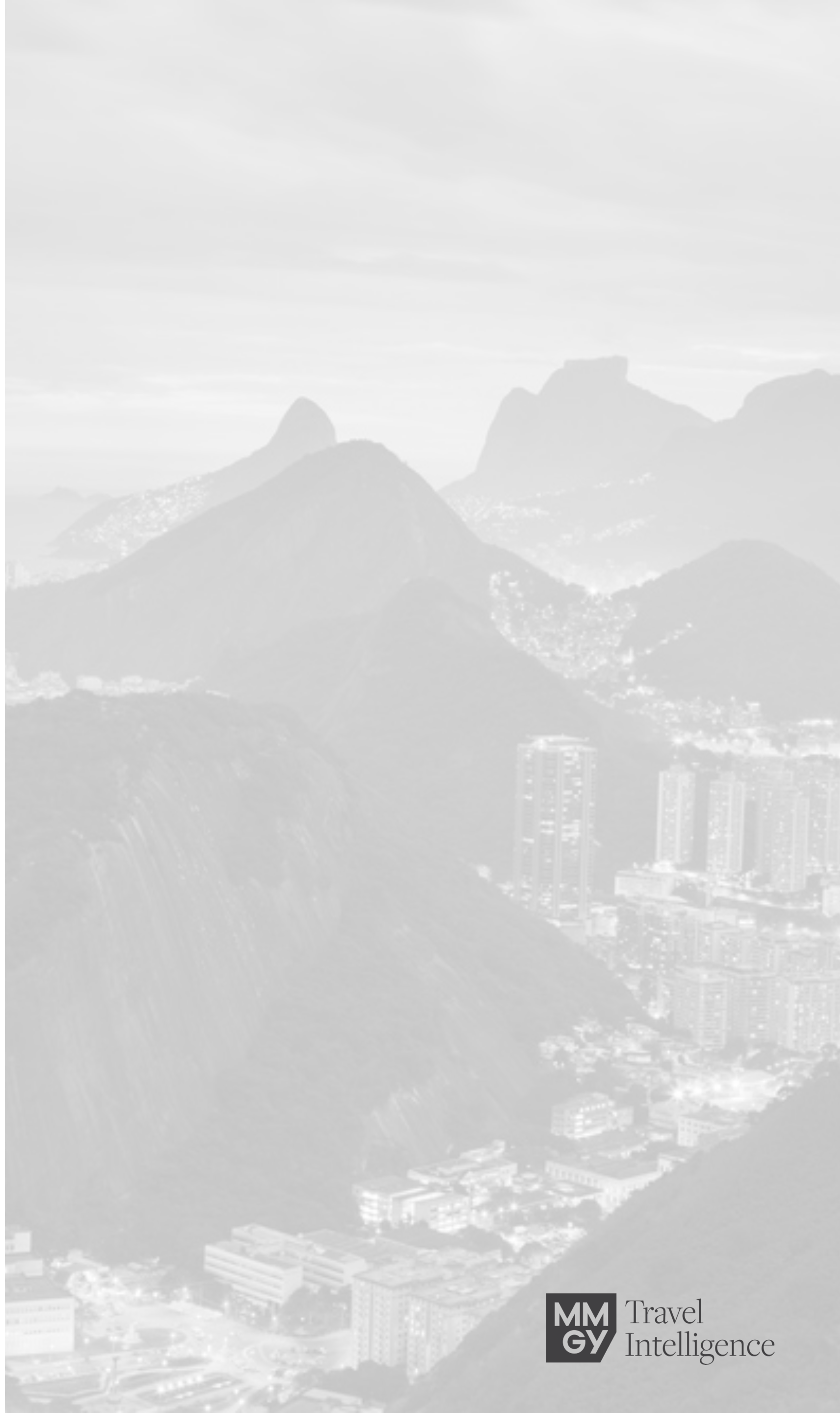
Asian Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting Asia	
Japan	51%
Thailand	44%
Singapore	27%
Vietnam	27%
China	23%
Philippines	22%
Indonesia	22%
India	22%
South Korea	21%
Malaysia	18%
Sri Lanka	18%
Cambodia	17%
Taiwan	12%
Papua New Guinea	11%
Macao	7%
Other	5%

Note: Papua New Guinea was asked to both those interested in Asia and the South Pacific
Base: European travellers interested in visiting Asia (n=2,676)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

South American Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting South America	
Brazil	55%
Argentina	51%
Peru	40%
Chile	30%
Colombia	27%
Venezuela	22%
Ecuador	19%
Bolivia	15%
Other	7%



Base: European travellers interested in visiting South America (n=2,590)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

Central American Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting Central America	
Costa Rica	71%
Panama	39%
Honduras	24%
Guatemala	25%
Belize	17%
Nicaragua	17%
Other	12%

Base: European travellers interested in visiting Central America (n=2,559)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

Middle Eastern Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting the Middle East	
Egypt	46%
Dubai	42%
Turkey	40%
Abu Dhabi	30%
Jordan	28%
Israel	27%
Qatar	21%
Saudi Arabia	19%
Oman	16%
Lebanon	13%
Other	4%

Note: Egypt was asked to both those interested in Africa and the Middle East
Base: European travellers interested in visiting the Middle East (n=1,867)
Source: MMGY Global's 2022 *Portrait of European Travellers*TM

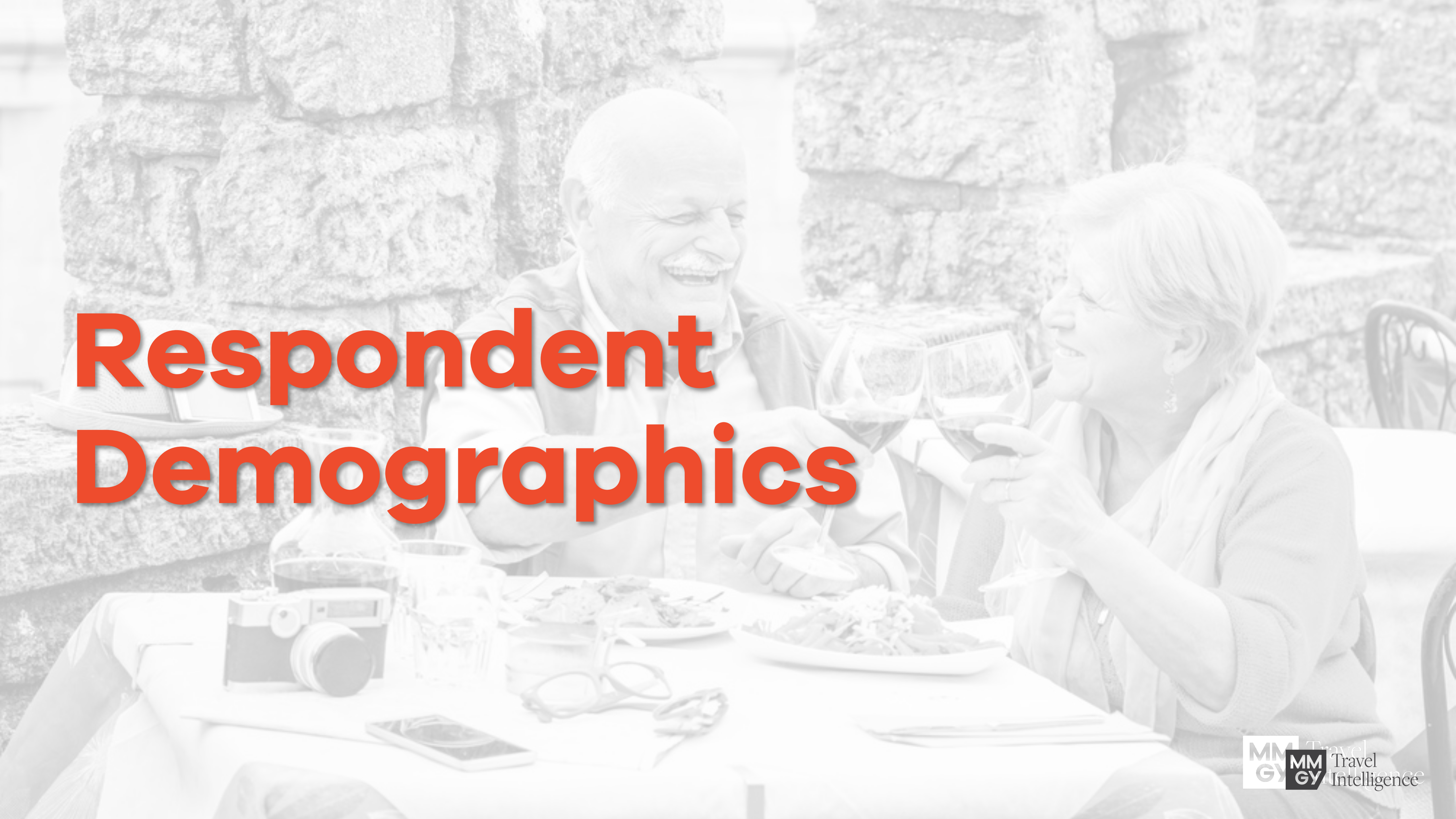
African Countries of Interest During the Next Three Years

Asked amongst travellers interested in visiting Africa	
Egypt	44%
South Africa	36%
Morocco	36%
Kenya	32%
Seychelles	31%
Mauritius	31%
Tanzania	22%
Namibia	16%
Ethiopia	12%
Zimbabwe	11%
Nigeria	11%
Zambia	10%
Botswana	10%
Uganda	7%
Rwanda	7%
Other	7%

Note: Egypt was asked to both those interested in Africa and the Middle East
Base: European travellers interested in visiting Africa (n=2,214)
Source: MMGY Global's 2022 *Portrait of European Travellers*™

MMGY Travel Intelligence

Respondent Demographics



MMGY Travel Intelligence

Respondent Demographics

	All European Travellers	France	Germany	Italy	Spain	U.K.
Male	49%	48%	50%	48%	49%	49%
Female	51%	52%	50%	52%	51%	51%
Other	0%	0%	0%	0%	0%	0%
Gen Zs	11%	13%	11%	11%	9%	14%
Millennials	28%	27%	25%	27%	29%	30%
Gen Xers	27%	25%	27%	29%	29%	26%
Boomers	32%	34%	32%	31%	32%	29%
Less than $75,000	71%	72%	63%	74%	76%	71%
$75,000–$124,999	22%	22%	28%	21%	20%	22%
$125,000 or more	7%	7%	9%	5%	5%	8%

Source: MMGY Global's 2022 *Portrait of European Travellers*™

Respondent Demographics (Continued)

	All European Travellers	France	Germany	Italy	Spain	U.K.
Married/living together	67%	69%	66%	65%	74%	62%
Never married	22%	20%	21%	24%	18%	27%
Divorced/separated/widowed	11%	11%	13%	11%	8%	10%
Secondary school or less	34%	25%	41%	50%	13%	41%
University degree	46%	52%	54%	25%	56%	41%
Postgraduate degree	21%	23%	5%	24%	31%	19%
Employed (full-time or part-time)	65%	61%	67%	64%	69%	65%
Retired	22%	27%	23%	19%	20%	22%
Temporarily unemployed	3%	3%	1%	4%	4%	3%
Homemaker (full-time)	4%	2%	3%	6%	3%	5%
Student	6%	6%	6%	7%	5%	5%

 Source: MMGY Global's 2022 *Portrait of European Travellers*™

THANK YOU

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