



TOTAL  
All countries

# TGM Global Travel Survey 2023

The world's largest survey on travel consumer behaviour



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Explore how people plan for their travelling



## Traveling Activities

Discover the diverse travelling experiences across regions.



## Favorite Airline Brands

Discover the favorite airline brands across regions.

Click on the image to jump directly to the specific section of the report.



## Time to Travel

# About the survey:

TGM Research embarks on a worldwide exploration, surveying 21 countries, to unravel fascinating travel behavior as depicted in the Global Travel Report 2023.

**21**

countries studied

**8,100**

consumers asked



**Schedule:**

01st October - 17th October, 2022



**Sample:**

a representative sample of N = 8,100+ of surveyed countries, age: 18-64



**Methodology:**

Internet interviews (CAWI), research project was entirely conducted by TGM Research



# TRAVEL: Data Pill

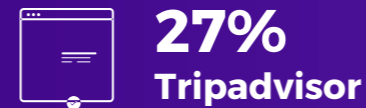
## TOTAL

TOTAL



of people likely will travel overseas for leisure in the next 12 months

### Top 3 sources to learn about new destinations



### Most often travel companions



### Lodging preferences



### 3 key factors for planning international trips



### Essential travel needs TOP 3



### Common travel activities TOP 3





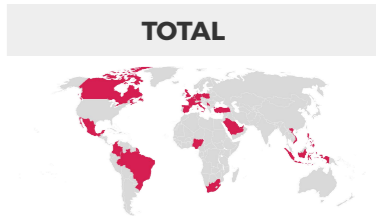
# Traveling: Plan & Behaviour

Explore how people plan for their travelling

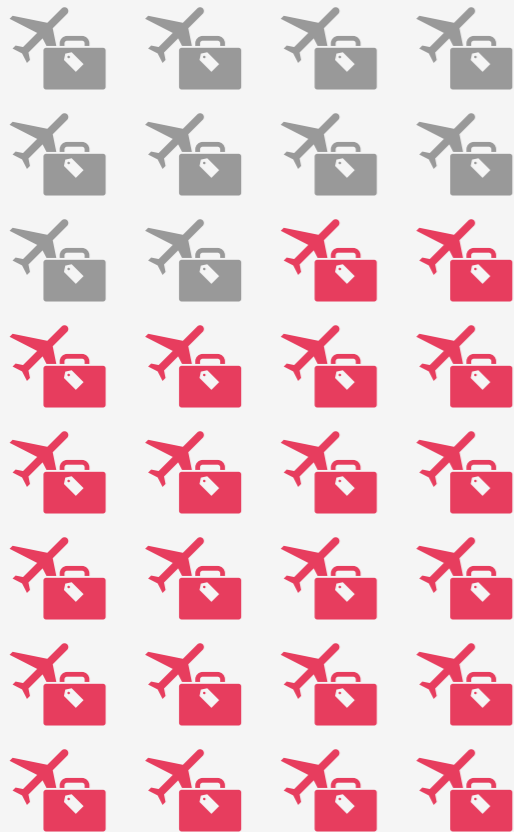


# 50%+ individuals globally likely will travel overseas in the next 12M.

## Regional focus: **TOTAL**

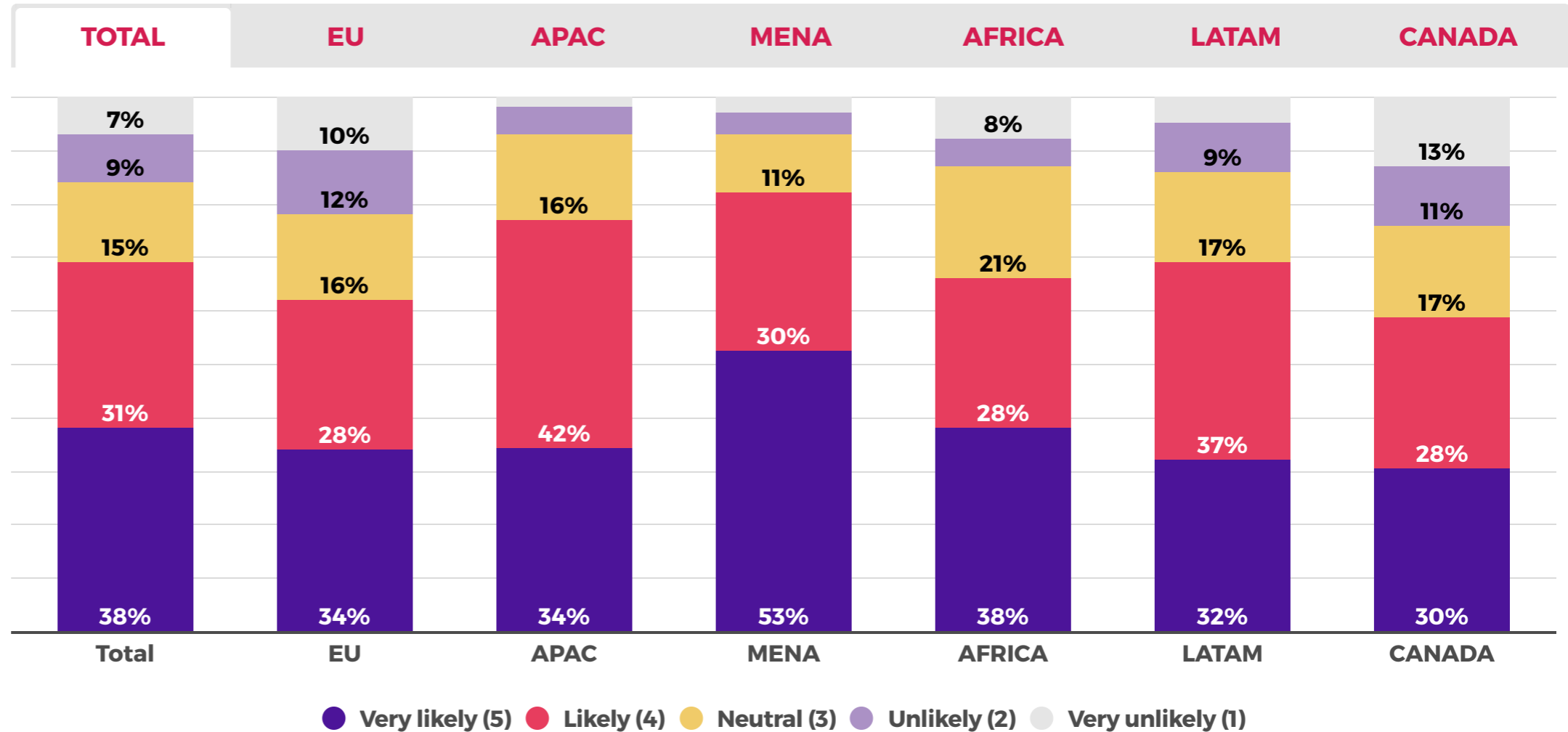


% of people likely will travel overseas in the next 12M  
(Top 2 boxes)



**69% of people in TOTAL likely will travel in the next 12M**

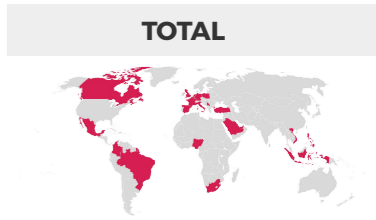
How likely you will travel overseas for leisure over the next 12M? (%)



Q: 'How likely you will travel overseas for leisure over the next 12M?' - Total N=4119

# Top planned air travel destinations in the next 12M.

## Regional focus: TOTAL



Which of the following locations do you intend to travel by plane within the next 12 months? (%)

< TOTAL >



	18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	Male	Female
North America	19%	21%	20%	15%	14%	18%	18%
Central and South America	10%	14%	9%	9%	10%	10%	10%
Western Europe	21%	22%	24%	22%	25%	24%	22%
North Europe / Scandinavia / Baltics	13%	13%	9%	9%	7%	10%	10%
Central and Eastern Europe	16%	16%	13%	13%	9%	13%	14%
Southern Europe / Balkans	10%	11%	12%	11%	10%	10%	11%
North Africa	7%	7%	7%	5%	3%	6%	6%
Rest of Africa	5%	5%	3%	3%	2%	4%	4%
Middle East	9%	15%	16%	13%	4%	15%	10%
Central Asia	5%	7%	5%	4%	4%	5%	5%
Southeast Asia	11%	12%	12%	10%	5%	10%	11%
East Asia	6%	9%	8%	6%	3%	7%	7%
Australia / Oceania	7%	6%	7%	5%	4%	6%	7%
None of the above	17%	12%	14%	19%	31%	17%	18%

Q: 'Which of the following locations do you intend to travel by plane within the next 12 months?' - Total N=4104

# Travel company websites are the preferred source for discovering new destinations across almost all regions.



TOTAL    EUROPE    APAC    MENA    AFRICA    LATAM    CANADA

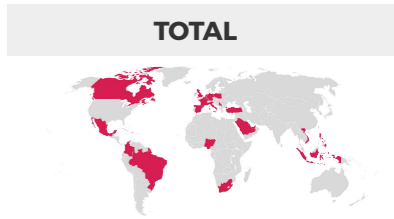


	TOTAL	EUROPE	APAC	MENA	AFRICA	LATAM	CANADA
YouTube	27%	20%	40%	39%	27%	29%	26%
Tripadvisor	27%	30%	23%	19%	31%	21%	40%
Travel Blogs	25%	26%	29%	24%	32%	19%	20%
facebook	23%	19%	30%	27%	26%	26%	20%
Instagram	23%	21%	21%	27%	16%	26%	21%
SnapChat	8%	7%	8%	11%	9%	7%	4%
TikTok	6%	6%	9%	4%	6%	9%	7%
twitter	5%	3%	5%	11%	12%	3%	3%

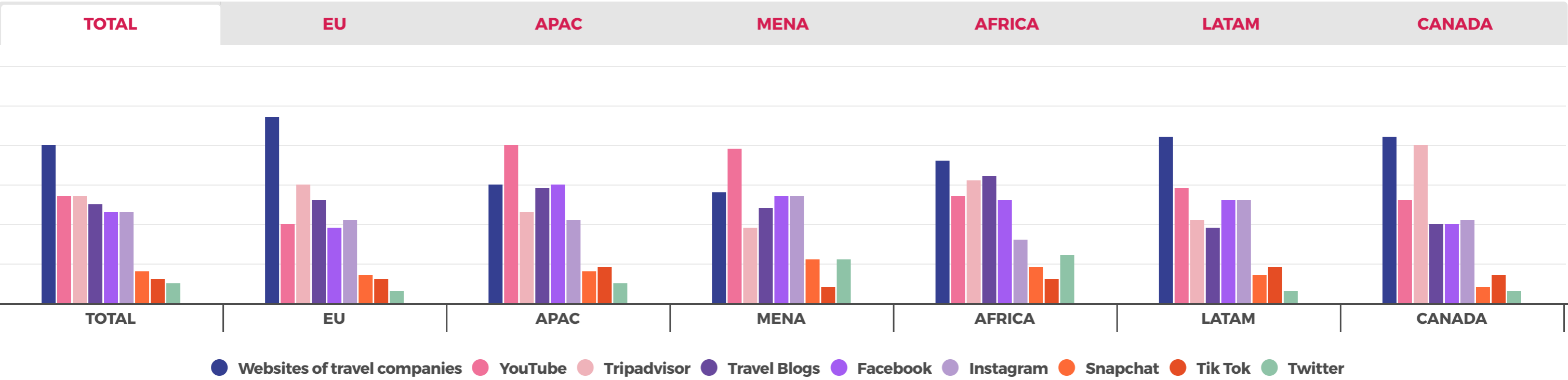


# Popular go-to-sources for exploring new destinations.

## Regional focus: **TOTAL**



Which source of information you are using most often when it comes to learning about new destinations? (%)



● Websites of travel companies 
 ● YouTube 
 ● Tripadvisor 
 ● Travel Blogs 
 ● Facebook 
 ● Instagram 
 ● Snapchat 
 ● Tik Tok 
 ● Twitter

Q: 'Which source of information you are using most often when it comes to learning about new destinations?' - Summary Top' - Total N=4107

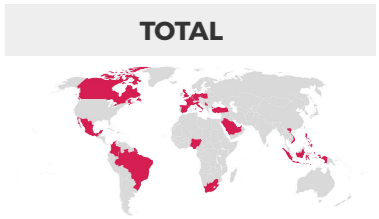
With an abundance of online platforms, social media channels, and user-generated content, travelers now have a myriad of sources to turn to when seeking inspiration and insights. Based on our survey findings, 40% of respondents worldwide primarily rely on travel agency websites for destination exploration. YouTube and Tripadvisor emerge as equally popular choices, each garnering a 27% preference among individuals seeking information about new locations.





# Premium and deluxe lodging options are highly favoured when traveling.

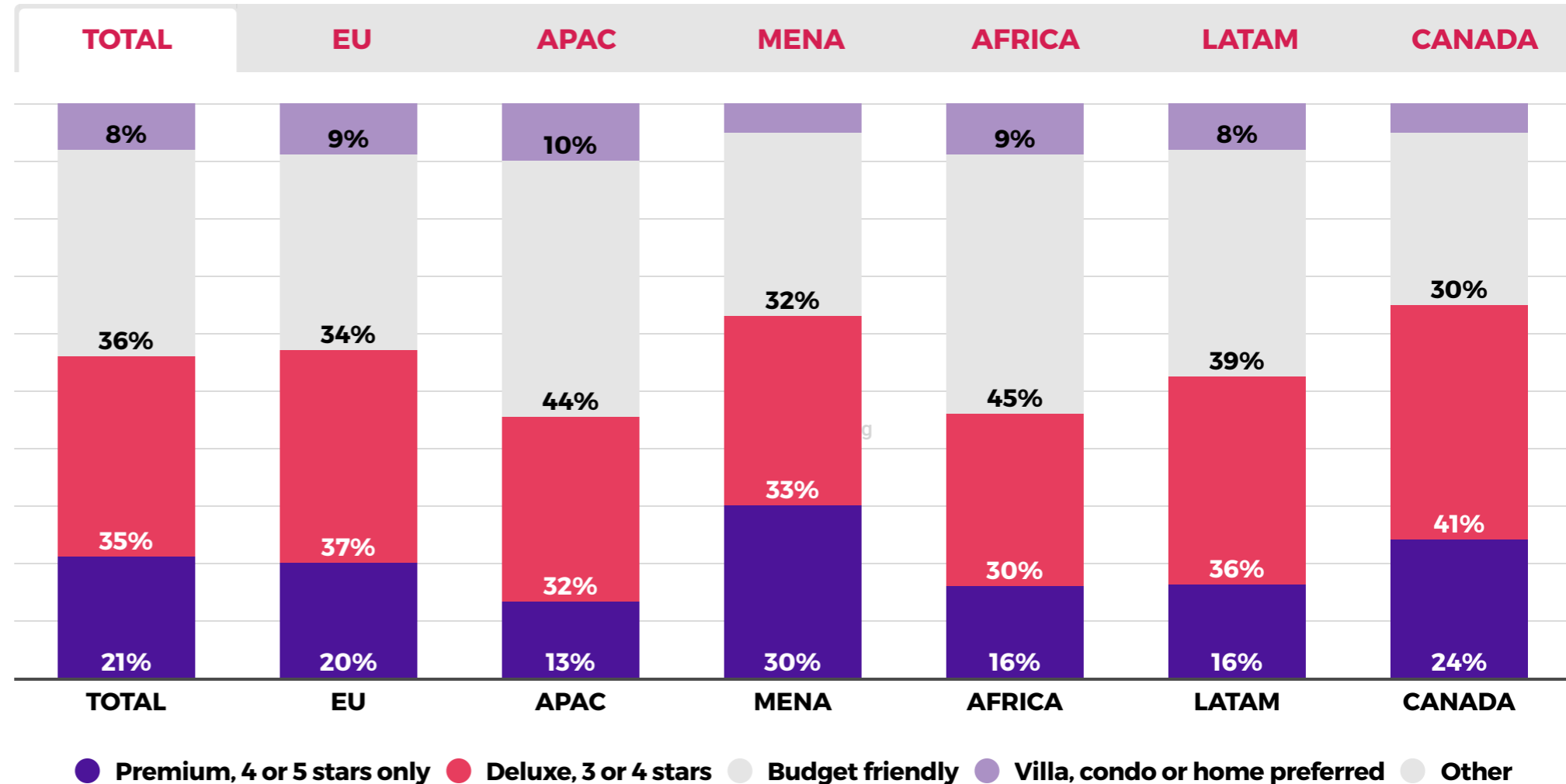
## Regional focus: **TOTAL**



-  **56%** of people in TOTAL often travel with family
-  **17%** of people in TOTAL often travel with friends
-  **17%** of people in TOTAL often travel with partner
-  **10%** of people in TOTAL often travel as solo

Q: 'With whom do you travel most often?' - Total N=2123

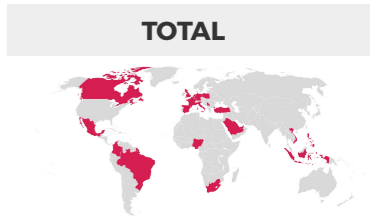
### What are your lodging preferences when traveling for leisure? (%)



Q: 'What are your lodging preferences when traveling for leisure?' - Total N=2096

# Lodging preferences when traveling vary across ages & gender.

## Regional focus: **TOTAL**



**67%**

of travel bookings in **TOTAL** are made via Internet or website



**33%**

of travel bookings in **TOTAL** are made via travel agencies/tour operators

Q: 'How do you book your travels?' - Total N=2124

A notable majority of participants globally, comprising a significant 60%, disclosed that their travel experiences are most often shared with their family members. This inclination is particularly pronounced among individuals aged 35 to 54. However, as the pages of life turn, those between the ages of 55 to 64 display a distinct preference for embarking on captivating sojourns hand-in-hand with their partners.

When it comes to lodging preferences, the general consensus leans towards modest and affordable accommodations, typically ranging between three and four stars and budget-friendly options, emphasizing the desire for comfort without excessive extravagance.

### With whom do you travel most often? (%)

TOTAL	EU	APAC	MENA	AFRICA	LATAM	CANADA							
							18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	Male	Female
with friends							25%	25%	16%	12%	14%	19%	17%
with family							50%	39%	59%	62%	40%	48%	54%
solo							15%	12%	9%	5%	5%	13%	5%
couple travels (with my partner only)							10%	24%	16%	20%	41%	20%	25%

Q: 'With whom do you travel most often?' - Total N=2123

### What are your lodging preferences when traveling for leisure? (%)

	18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	Male	Female
Premium, 4 or 5 stars only	22%	24%	22%	16%	15%	20%	22%
Deluxe, 3 or 4 stars	31%	36%	36%	36%	38%	36%	34%
Budget friendly	39%	35%	35%	37%	36%	37%	35%
Villa, condo or home preferred	8%	6%	7%	11%	11%	7%	9%

Q: 'What are your lodging preferences when traveling for leisure?' - Total N=2096



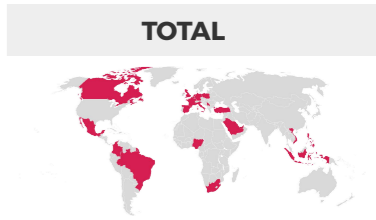
# Traveling Activities

Discover the diverse travelling experiences across regions.

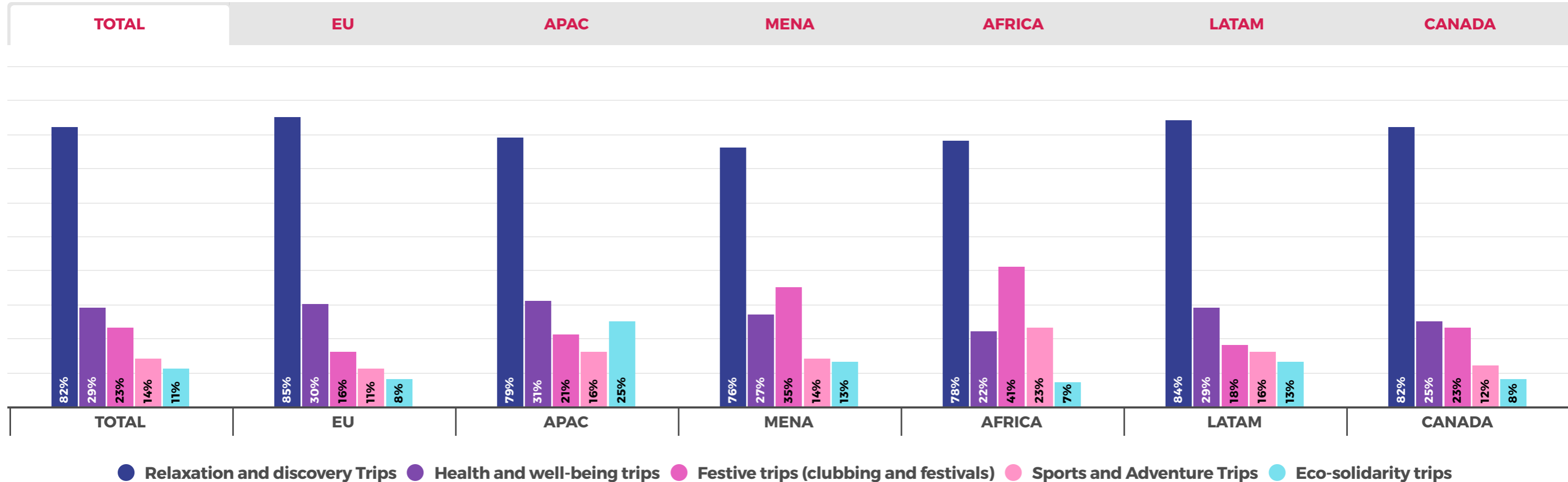


# Relaxation trip & discovery trip are generally the most popular trip/travel types.

Regional focus: **TOTAL**



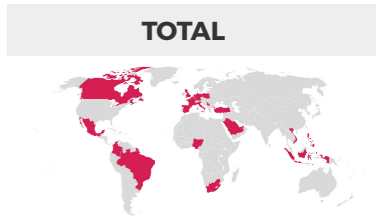
Which types of trips/ travel styles are most suitable for you? (%)



Q: 'Which types of trips \ travel styles are most suitable for you? - Summary Top' - Total N=2121

# Cost and affordability are crucial factors in planning international trips, except for the LATAM region.

## Regional focus: TOTAL



### TOP 3 factors when planning international trips - REGIONs Total



**41%**

of people in TOTAL choose cost & affordability



**29%**

of people in TOTAL choose free time to relax



**28%**

of people in TOTAL choose local culture & history experience



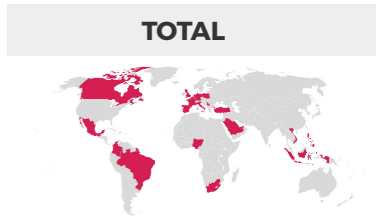
### What are the 3 most important factors to you when planning your international trip? (%)

TOTAL	EU	APAC	MENA	AFRICA	LATAM	CANADA							
							18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	Male	Female
Top rated hotel accommodations							9%	12%	13%	11%	9%	11%	12%
All-inclusive experiences							19%	22%	22%	23%	21%	20%	23%
Excellent dining options							18%	17%	16%	16%	22%	17%	18%
Experiencing local culture and history							21%	26%	28%	31%	38%	27%	30%
Incorporating excursions, tours and activities							17%	19%	24%	21%	22%	20%	21%
A detailed schedule/itinerary							9%	11%	9%	11%	11%	10%	10%
Flexible schedule							18%	14%	14%	13%	18%	15%	14%
Free time to relax							26%	28%	29%	30%	30%	30%	27%
Breakfast included with hotel							16%	15%	15%	20%	21%	15%	19%
Cost and affordability							37%	37%	40%	45%	49%	40%	41%
Nightlife and entertainment							16%	14%	11%	9%	3%	14%	9%
Centrally located accommodations							11%	15%	15%	18%	22%	14%	18%
Child-friendly							10%	17%	23%	15%	2%	16%	15%
Adult only resorts/accommodations/cruises							9%	14%	7%	5%	8%	10%	8%
Access to gym							9%	6%	4%	3%	2%	6%	3%
Access to spa							10%	8%	6%	5%	4%	7%	6%
Pet-friendly							6%	6%	5%	6%	4%	5%	6%

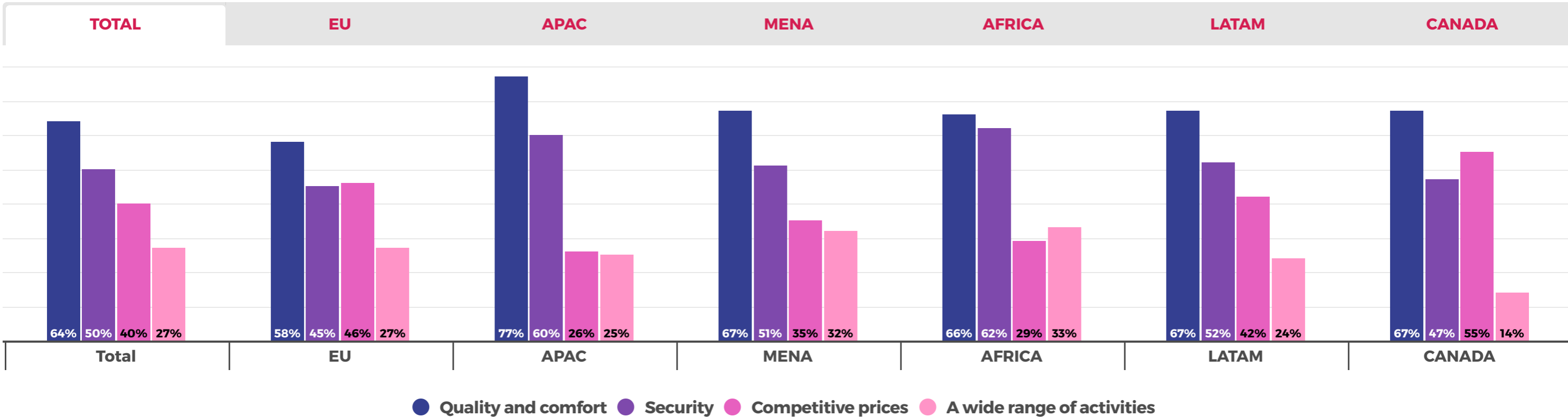
Q: 'What are the 3 most important factors to you when planning your international trip?' - Summary Top' - Total N=2119

# The most important needs/requirements when traveling.

## Regional focus: **TOTAL**



What are your most important needs / requirements when traveling? (%)



Q: 'What are your most important needs / requirements when traveling?' - Summary Top' - Total N=2116

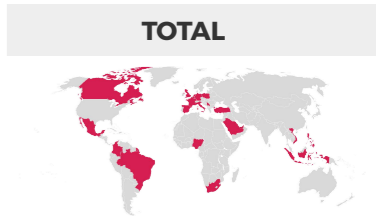
A prevailing trend among 64% of global respondents is their emphasis on prioritizing high-quality and comfortable travel experiences. Security-related matters are the second most important factor for half of the global respondents, reflecting the fundamental need for travelers to feel safe and secure throughout their trips. Additionally, competitive prices also hold significant weight, particularly in Canada, where travelers rank this factor as their second priority.



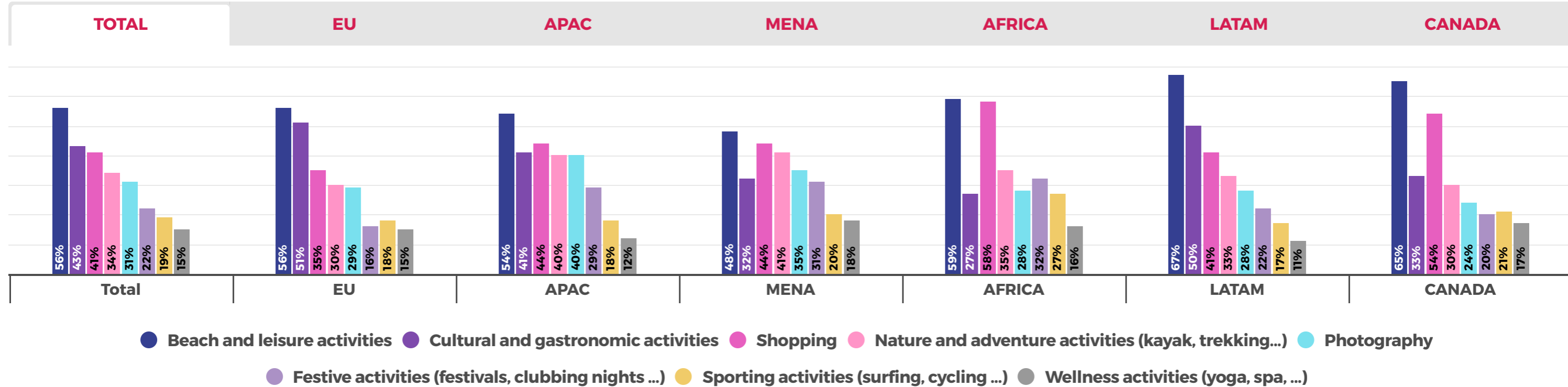


# Beach and leisure activities tend to be the top preferences when it comes to traveling.

## Regional focus: **TOTAL**



What activities do you usually do while traveling? REGION (%)



Q: 'What activities do you usually do while traveling?' - Summary Top' - Total N=2112

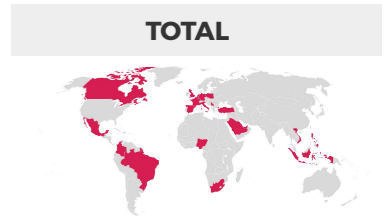
A significant inclination towards beach and leisure activities emerges when people travel, as indicated by 56% of respondents surveyed worldwide. This preference is commonly shared across various regions, particularly in Latin America, where 67% of regional respondents express a high preference for this option. While cultural and gastronomic activities are commonly favored as the second choice, notable regional differences exist. Africa and Canada, specifically, demonstrate higher enthusiasm for shopping.



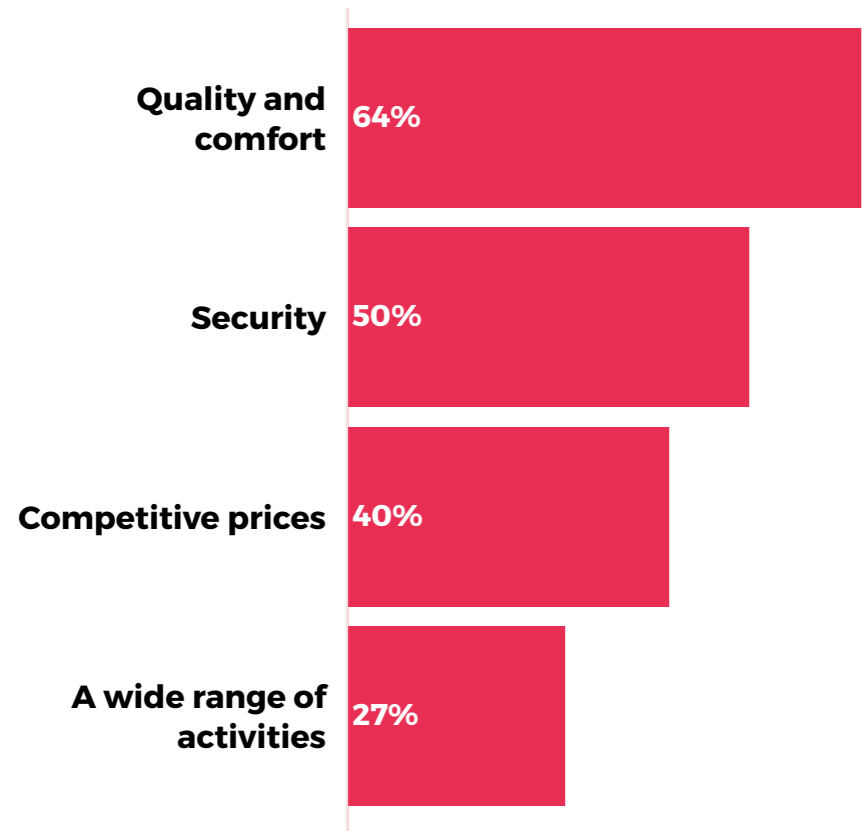
# Preferred Travel Activities: Exploring Top Choices across regions

## Age & gender differences

### Regional focus: **TOTAL**



What are your most important needs / requirements when traveling? (%)



Q: 'What are your most important needs / requirements when traveling?' - Summary Top' - Total N=2116

What activities do you usually do while traveling? Age & Gender differences (%)

	TOTAL	EU	APAC	MENA	AFRICA	LATAM	CANADA
	18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	Male	Female
Wellness activities (yoga, spa, ...)	15%	17%	15%	15%	11%	15%	16%
Cultural and gastronomic activities	31%	39%	41%	50%	58%	41%	46%
Festive activities (festivals, clubbing nights ...)	31%	26%	22%	18%	11%	25%	19%
Shopping	37%	42%	39%	45%	42%	37%	46%
Beach and leisure activities	53%	51%	55%	61%	70%	54%	58%
Photography	33%	34%	31%	26%	30%	32%	31%
Nature and adventure activities (kayak, trekking...)	25%	37%	38%	34%	28%	34%	34%
Sporting activities (surfing, cycling ...)	24%	22%	21%	12%	11%	22%	16%

Q: 'What activities do you usually do while traveling?' - Summary Top' - Total N=2112



# Favorite Airline Brands

Discover the favorite airline brands across regions.



# Which airline brands are the most known?

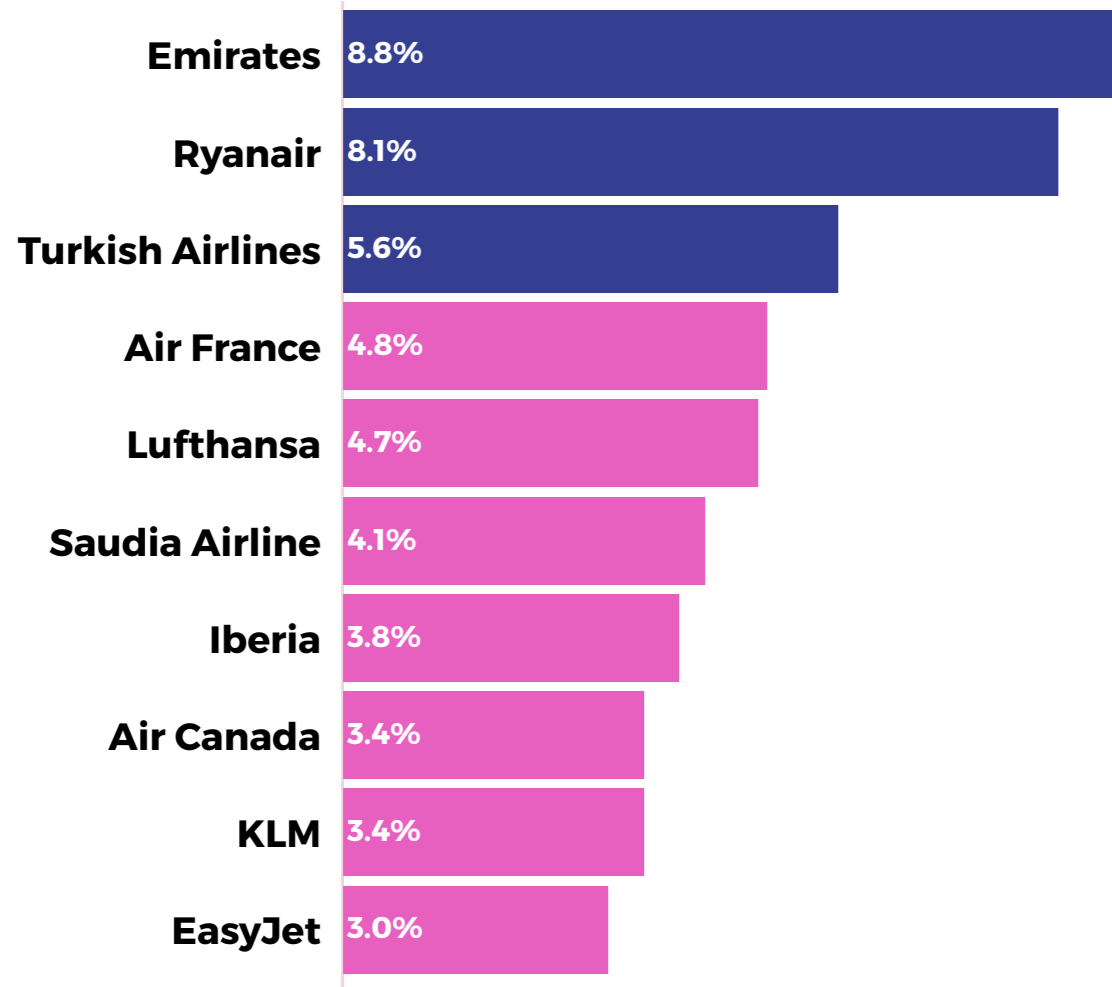
TOTAL



## TOTAL

### What are your favorite airline brands?

(All countries, Top10):



Q: 'What are your favorite airline brands?' - TOTAL N = 6080

### Why do you like this airline the most?

(All countries, Top10):

Reasons	TOTAL
Price	13.4%
Good Service	11.3%
Comfortable	8.2%
National Airline	5.6%
Quality	3.7%
Good experience	3.0%
Reliable	2.9%
Safety	2.6%
Convenient	2.5%
Friendly	2.3%

Q: 'Why do you like this airline the most?' - TOTAL N = 6060

Brands with the highest level of unaided brand awareness



# Which **airline brands** are the most known?

## Regional focus: **Europe**

### What are your favorite airline brands?

Ranking	EU	APAC	MENA	AFRICA	LATAM	CANAADA
1st	Ryanair	Garuda Indonesia Airlines	Emirates	Emirates	Avianca	Air Canada
2nd	Air France	Vietnam Airlines	Turkish Airlines	South African Airways	LATAM Airlines	WestJet
3rd	Lufthansa	Philippines Airlines	Saudia Airline	British Airways	Aeroméxico	Air Transat
4th	Iberia	AirAsia	Pegasus Airlines	Air Peace	Gol Linhas Aéreas Inteligentes	KLM
5th	easyJet	Cebu Pacific	Air Arabia	Mango	Volaris	Sunwing

Q: 'What are your favorite airline brands?' - TOTAL N = 6080



On a global scale, Emirates and Ryanair have emerged as the top two globally recognized airline brands. However, when delving into regional observations, distinct preferences among passengers become evident. Furthermore, national airlines are gaining prominence, serving as popular options for both domestic and regional passengers. These insights emphasize the dynamic airline preferences across regions, highlighting the significance of regional offerings and prominent national carriers in the evolving aviation landscape.



# Appendix: Methodology

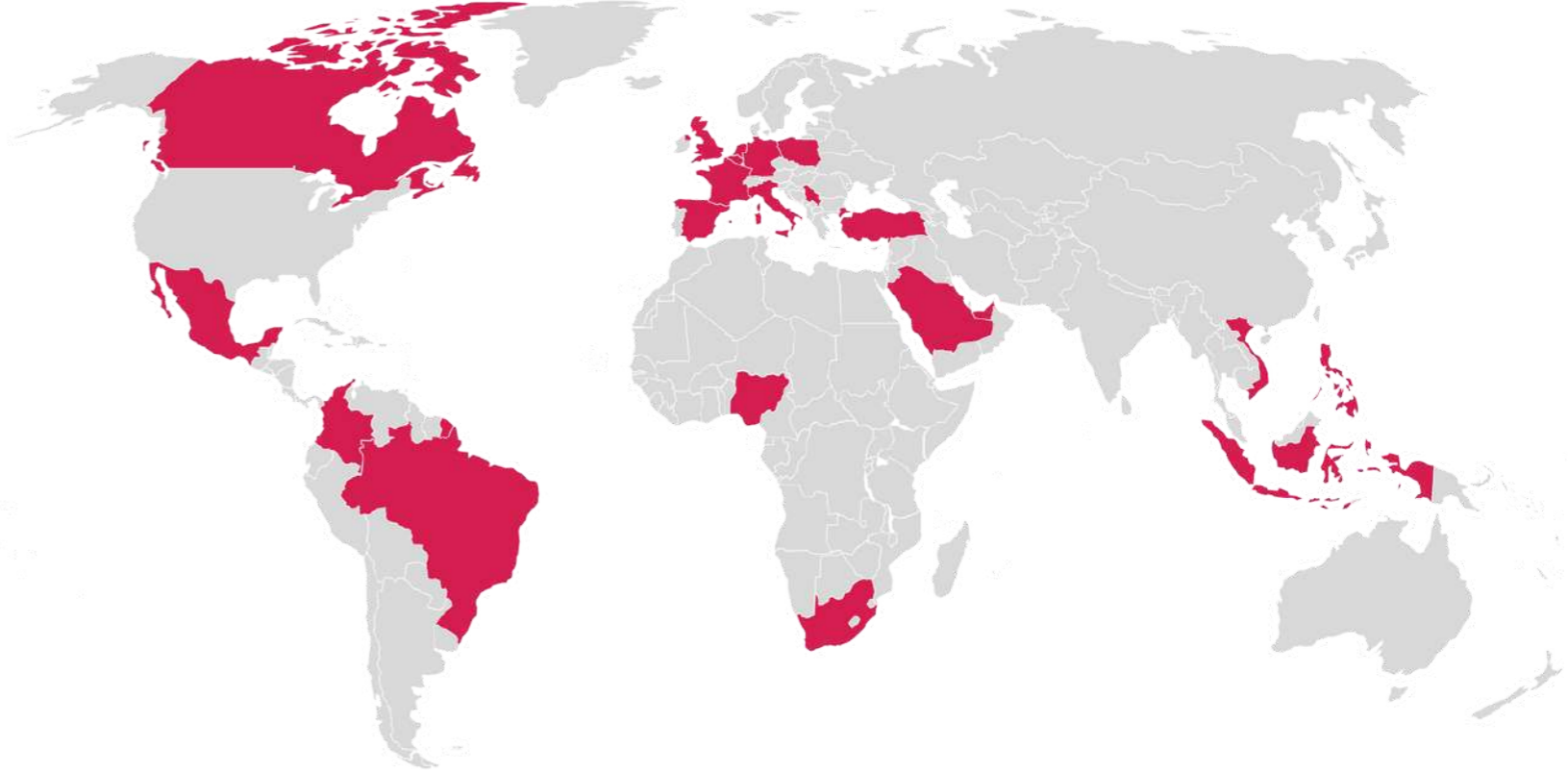
Methodological notes about the  
TGM Global Travel Survey 2023






# About TGM Global Travel 2023 Project

The survey was carried out between the 01st October - 17th October, 2022, using the method of online interviews in 21 countries on a nationally representative sample.

The sample is a representative population of the given countries in terms of gender and age (details below).



-  **Schedule:** 01st October - 17th October, 2022
-  **Sample:** a representative sample of N = 8,100+ of surveyed countries, age: 18-64
-  **Methodology:** Internet interviews (CAWI), research project was entirely conducted by TGM Research



# About TGM Global Travel 2023 Project

Canada		Belgium	France	Germany	Italy	Netherlands	Poland	Serbia	Spain	England	Region Total
POPULATION	38M	11M	67M	83M	60M	17M	38M	7M	47M	56M	386M
SAMPLE SIZE	414	356	463	426	445	318	515	344	417	366	3650
DEMOGRAPHIC	18-64	18-64									

Indonesia		Philippines	Vietnam	Region Total	Nigeria	South Africa	Region Total
POPULATION	271M	108M	96M	475M	220M	59M	279M
SAMPLE SIZE	396	308	261	965	398	356	754
DEMOGRAPHIC	18-64	18-64	18-54		18-64		

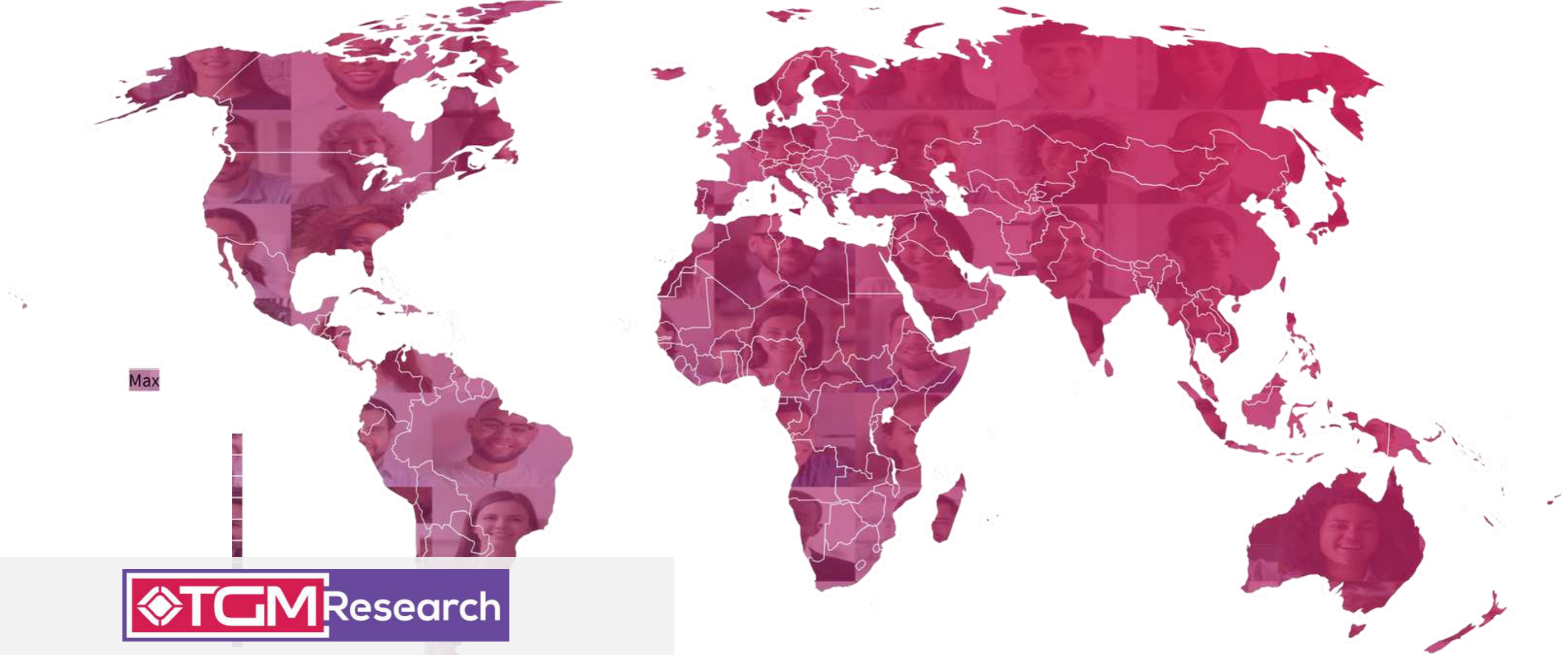
Saudi Arabia		Turkey	UAE	Region Total	Brazil	Colombia	Mexico	Region Total
POPULATION	34M	83M	10M	127M	211M	50M	128M	389M
SAMPLE SIZE	401	428	412	1241	354	348	377	1079
DEMOGRAPHIC	18-54	18-64	18-54		18-64			





# About TGM Research





Max



**TGM Research (TGM) is a technology-driven market research company specialising in global online data collection and innovative survey technology.**

**TGM provides agile insights for better decisions, using the most comprehensive Res-Tech to spearhead the use of digital for better market research. TGM is a remote-first company with a team of 50+ members, having a presence on five continents.**



# Agile Research for Better Decisions

3 billion people in 130+ countries at your fingertips