MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

09/20 | WAVE 1

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

WAVE 1
RESEARCH HIGHLIGHTS

This report examines and monitors sentiment and short-term intentions for domestic and intra-regional travel of European citizens from 10 high-volume source markets in light of the COVID-19 crisis, and is the first out of six waves of market research, conducted in August 2020 onwards.

- Europeans demonstrate an **optimistic sentiment towards travel;** 54% of respondents intend to take a trip in the next 6 months while 26% state that they plan to travel until November 2020. Travel in Europe is a top choice with 41% intending to travel within their own country and 39% to other European destinations. Only 11% consider a trip outside Europe in the next months.
- The large majority of respondents who are more eager to travel, domestically or within Europe, in the next 6 months, will plan a **leisure** trip (66%)**.** Other purposes include **Visiting Friends and Relatives** (19%) and **Business** Travel (9%).

WAVE 1
RESEARCH HIGHLIGHTS

- **Sea, sun and beach** (25%), **city break** (19%) as well as **nature and outdoors** (16%) are the most appealing types of leisure trips among respondents eager to travel in the next 6 months.
- Respondents exhibiting a greater interest in **city breaks** are the ones most likely to travel sooner.
- The majority of respondents who planning short-term trips intend to travel, domestically or within Europe, either with their **partner** (37%) or with their **family** (36%). Only, a fragment will travel with friends (13%) or solo (10%).

WAVE 1
RESEARCH HIGHLIGHTS

- Finding a **treatment/vaccine for COVID-19** is expected to have only a mildly positive impact on travel, at least for the short-term, as only 44% of respondents state that they intend to plan their pre COVID-19 trip immediately after a treatment or vaccine has been found.
- **Quarantine measures** during a trip (15%), rising numbers of **COVID-19 cases** (12%) or getting **ill at the destination** (11%) as well as **changing travel restrictions** (10%), are the primary concerns for "early bird" travellers.
- With regard to personal health, **air travel** is considered the less safe part of a journey (20%) with fewer than 50% of respondents stating that they intend to travel by plane on their next trip*.
- The **substantial climate of uncertainty** is also highlighted by the large part of respondents (32%) that have not yet made a decision as to when they will take their next trip.

*According to UNWTO data, in 2018 the share of air travel in tourism was 58%.

WAVE 1
RESEARCH HIGHLIGHTS

- No factor is more important than flexible cancellation policies (11%) for travel decision making among respondents with short-term plans.
- Europeans ask primarily for **health and safety (21%)** for their next travels but **peace of mind & relaxation (14%)** as well as **affordability (13%)** of a trip are also keys for a highly sought-after travel experience.
- **Travel motivation** is resilient; as countries heavily affected by COVID-19 (i.e. Spain, Italy) are still among the most popular destinations and their citizens have a strong intention to travel, a COVID-19 outbreak does not necessarily mean that desire for travel has faded away.

WAVE 1

RECOMMENDATIONS FOR DESTINATIONS

- European destinations should **focus on existing demand for domestic and intra-European travel**. Destinations heavily dependent on air travel will need to rethink their short-term marketing strategies, source markets and target/niche audiences.
- To make travelling simple and reduce uncertainty, destinations should proactively communicate information regarding travel restrictions, health and safety measures as well as conveying a "business as usual" message, through NTBs and DMOs digital assets.
- Strong destination brands lead to image resilience and enhanced travel demand. NTOs should **further invest in branding and marketing**, to ensure optimal resilience amidst present and future crises, despite potentially reduced budgets.
- With two-thirds of travellers using online data sources for trip planning, destinations should increase the share of digital marketing focusing on travel review websites and encouraging visitors to share **positive experiences online**.

WAVE 1
RECOMMENDATIONS FOR BUSINESSES

- **Flexibility is now the new luxury** and having flexible and straightforward cancellation policies will be critical for both B2C and B2B. Businesses that are able to maximise flexibility will emerge stronger compared to their competitors.
- With **'peace of mind'** as a top travel quality, businesses that can manage the customer experience accordingly throughout the entire visitor journey and ensure **'carefree travel'** are expected to recover faster.
- As different markets and segments respond differently to the COVID-19 crisis, **data-driven marketing** is now becoming more important than ever. One segment with particularly strong potential is family travellers, especially among consumers aged 35-54.
- With digital bookings on the rise, businesses should insist in investing in digital marketing and in engaging with travellers along all stages of the **digital visitor journey**.

CONTENTS

01.

TRAVEL INTENTIONS

P. 10

02.

TRIP PLANNING

P. 30

03.

TRAVEL CONCERNS

P. 37

04.

METHODOLOGICAL ANNEX

P. 44

How to read

1. **To present insights, findings and statistics, the following distinct groups have been analysed depending on the topic and should be used as a reference:**
    - Total respondents; 5,762
    - Respondents with short-term travel plans/ most likely to travel in the next 6 months; 3,086
    - Respondents selecting outbound European destinations; 3,915

2. **To present the timing in which respondents are most likely to take their next trip, the following time periods should be used as a reference:**
    - This month; August – September 2020.
    - In 1-2 months; during September – November 2020.
    - In 3-4 months; during November 2020 – January 2021.
    - In 5-6 months; during January - March 2021.

3. **All data, statistics, findings and insights refer to domestic and intra-European travel, unless otherwise stated.**

TRAVEL INTENTIONS

01

The impact of COVID-19 vaccine will not be instant; less than half of respondents plan to re-schedule their pre-COVID-19 trip immediately after a vaccine is found

Top 5 markets most likely to resume travel when a COVID-19 treatment is found

Spain
61.8%

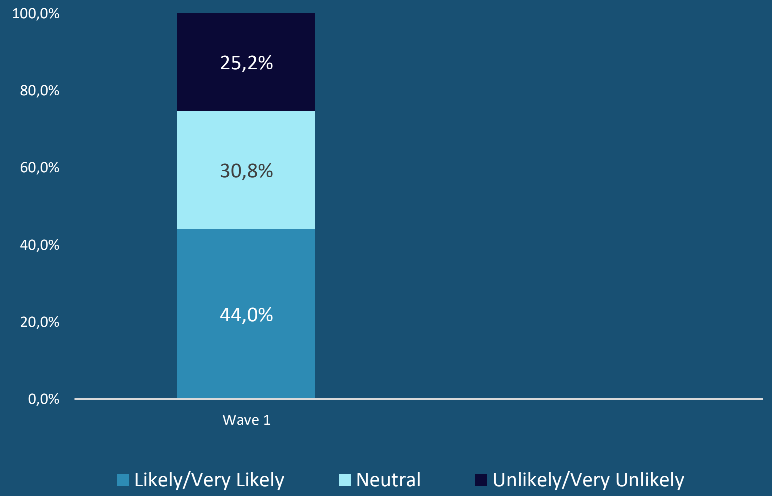
Poland
57.4%

Italy
51.2%

UK
48.4%

France
43.3%

Intention to re-schedule a pre COVID-19 trip immediately after a treatment/ vaccine is found



Q6.To what extent do you agree/ disagree with the following statement: “when a treatment/ vaccine for COVID-19 is found, I will immediately book or reschedule the trip I had planned pre-COVID 19”

No. of respondents: 5,762

Optimism about travel remains with over half of respondents intending to take a trip, domestically or within Europe, in the next 6 months

Top 5 markets which are most likely to travel in the next 6 months

Poland
74.2%

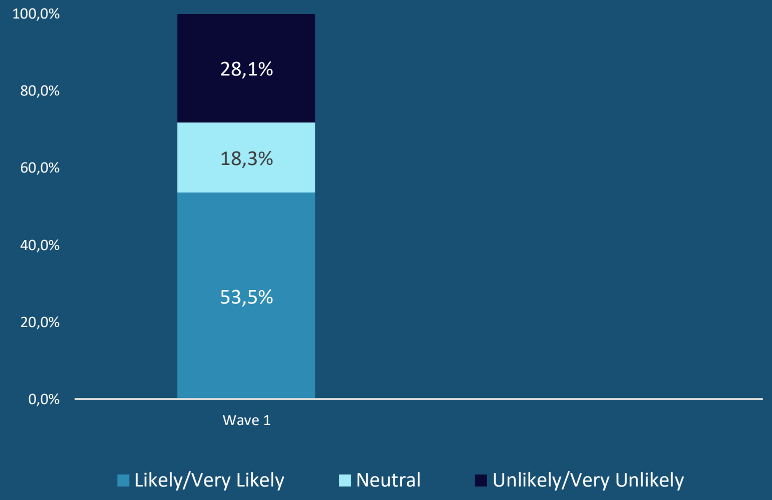
Germany
52.8%

Italy
57.8%

Austria
52.8%

Spain
54.4%

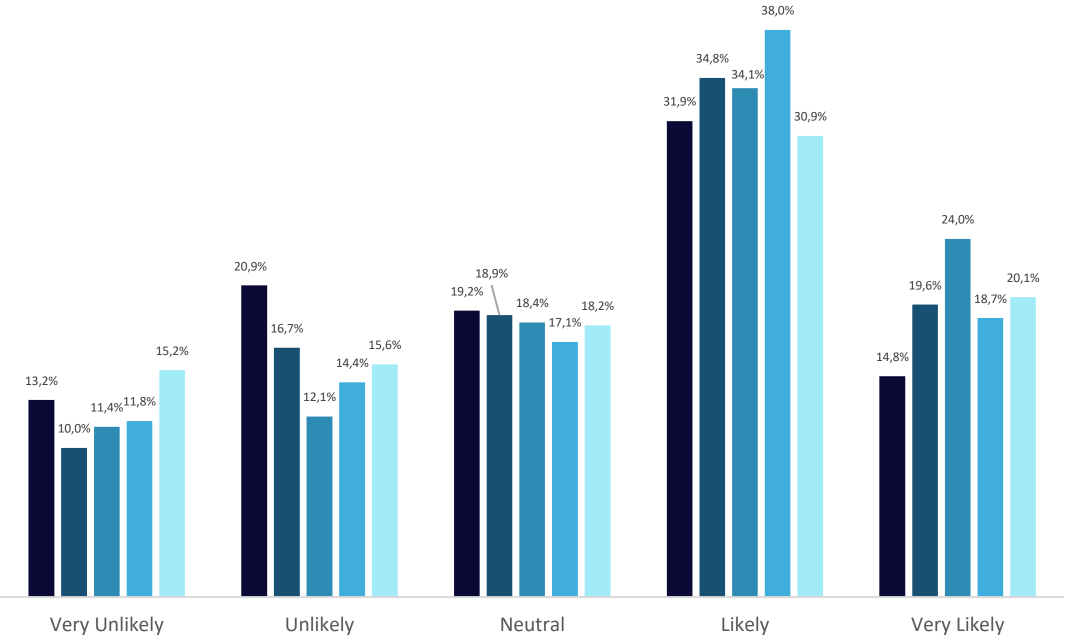
Intention to travel in the next 6 months



Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 5,762

All age groups – other than Gen Z (aged 18-24) – exhibit the same desire to travel in the next 6 months

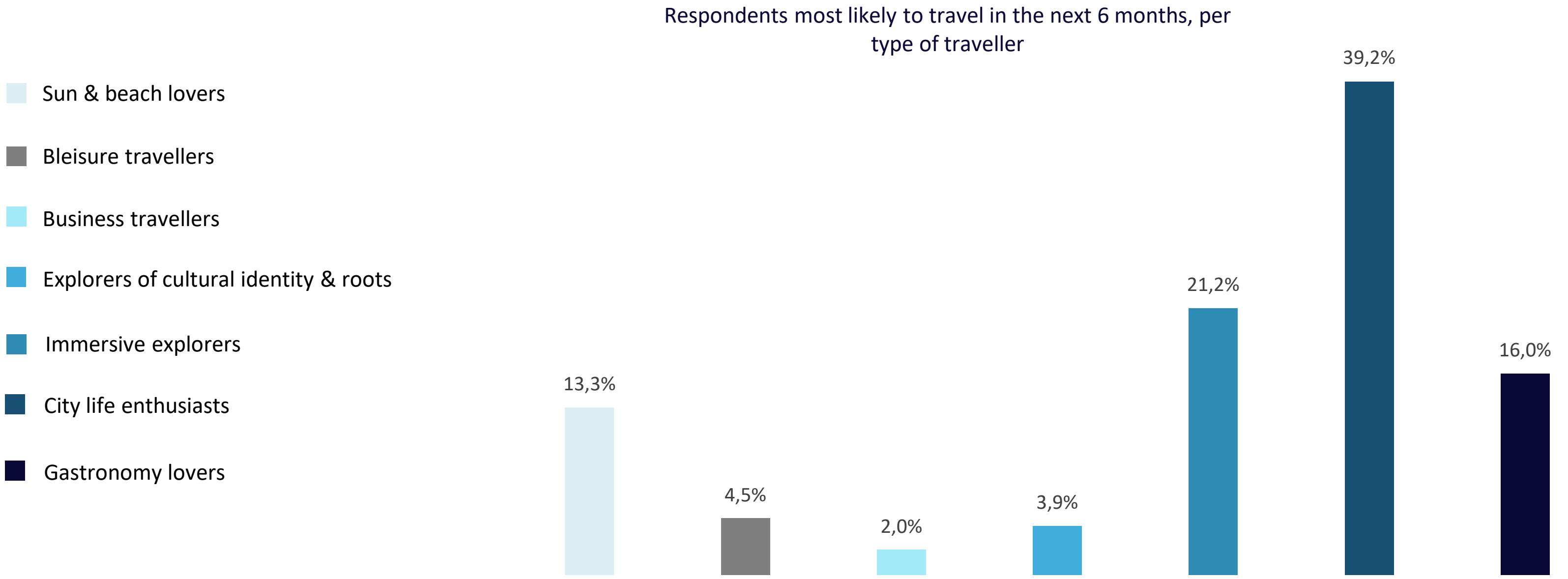


By comparison with other age groups, **Gen Z respondents (aged 18-24)** seem the least likely to travel. Gen Zers prize **fun** and **adventure** in their travel experiences and for many destinations both of these elements are currently a challenge

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 5,762

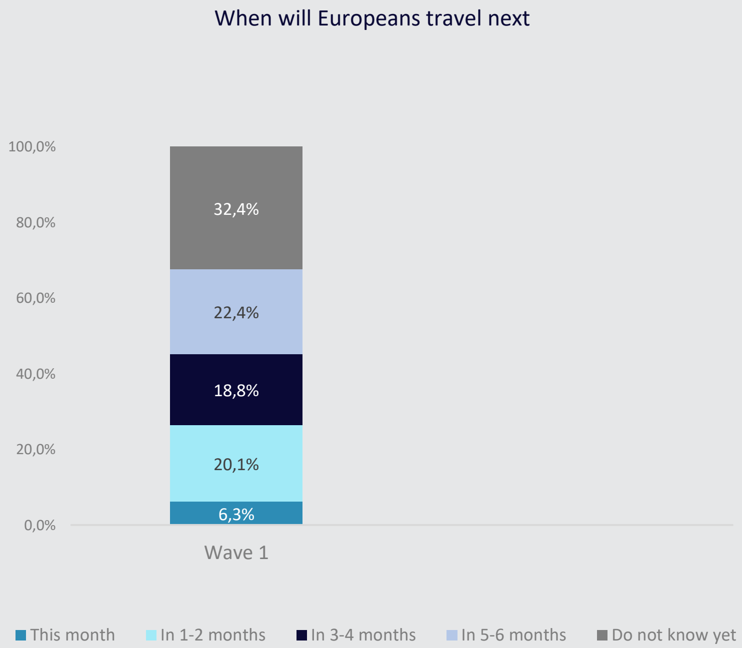
“City life enthusiasts” (respondents that enjoy city breaks) are the most likely to resume travel first



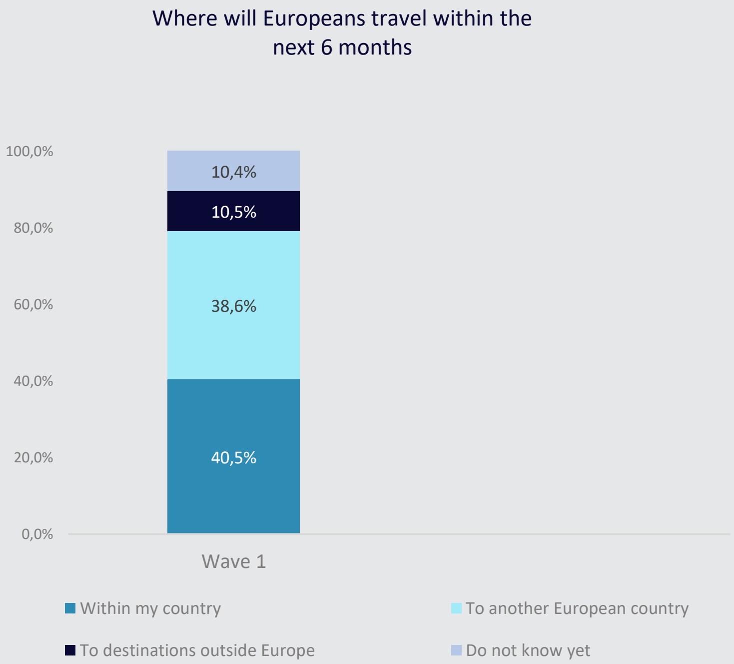
Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 3,086

More than 1 out 4 respondents intend to travel until November 2020 having either domestic or intra-European trips as top choices



For specific dates please refer to slide 9



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

No. of respondents: 5,762

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

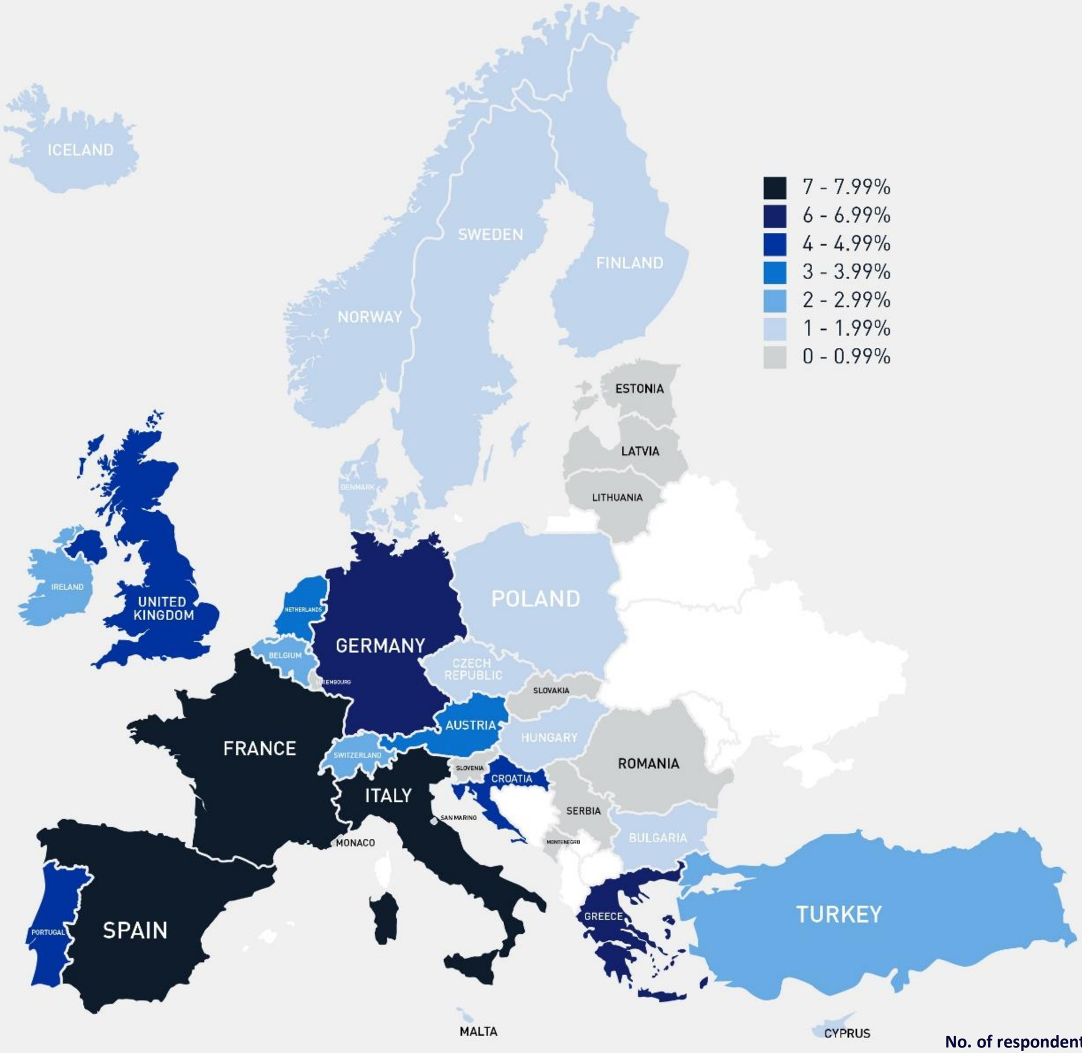
No. of respondents: 5,762

PREFERRED COUNTRIES FOR INTRA-EUROPEAN TRAVEL

Which countries respondents intend to visit next

TOP 10 COUNTRIES

Spain	7.8%
France	7.3%
Italy	7.3%
Greece	6.2%
Germany	6.0%
Portugal	4.6%
United Kingdom	4.2%
Croatia	4.1%
Austria	3.4%
Netherlands	3.3%



No. of respondents: 3,915

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

Vacations only; respondents choose leisure and visiting friends and relatives for their next trip

Top 3 markets to resume leisure travel

Poland

50.2%

Italy

43.3%

Spain

35.2%

Top 3 markets to resume business travel

Spain

7.2%

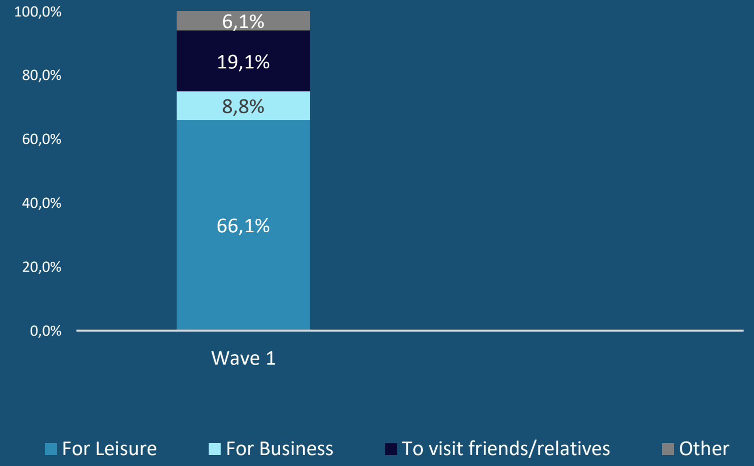
Poland

6.2%

Austria

6.0%

Purpose of travel for respondents most likely to travel in the next 6 months



No. of respondents: 3,086

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

Respondents are still dreaming of their summer vacations with sea, sun and beach being on top of mind for their next holiday

Preferred type of leisure trip for respondents most likely to travel in the next 6 months

The most popular destinations for sea, sun and beach are Spain, Italy and France

The most sought-after destinations for city break are Germany, France and Italy

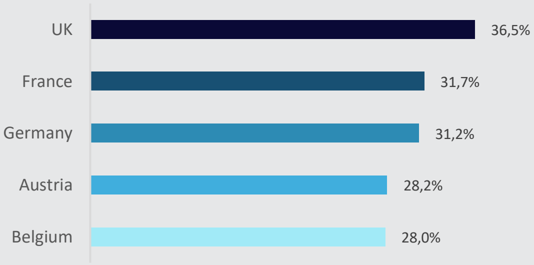
The most preferred destinations for nature and outdoors are France, Italy and Germany

No. of respondents: 3,086

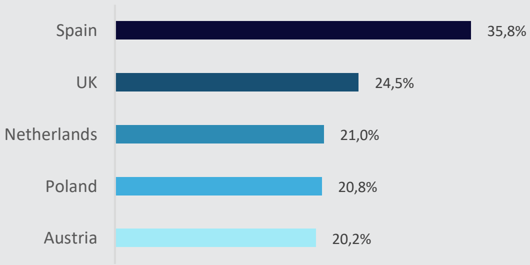
Q17.What type of leisure trip within Europe are you most likely to undertake next?

Sea, sun and beach is more popular among UK respondents, city breaks among respondents from Spain. Nature is top of mind among Germans while Italians favor culture the most

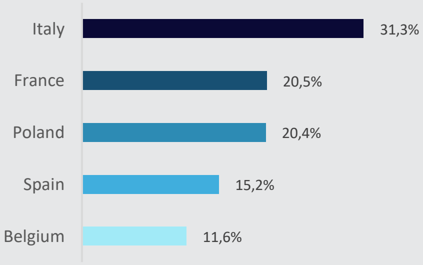
Sea, Sun, & Beach



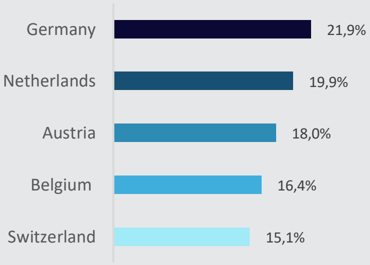
City Break



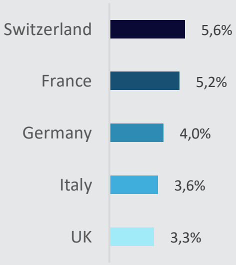
Culture & Heritage



Nature & Outdoors



Cruising



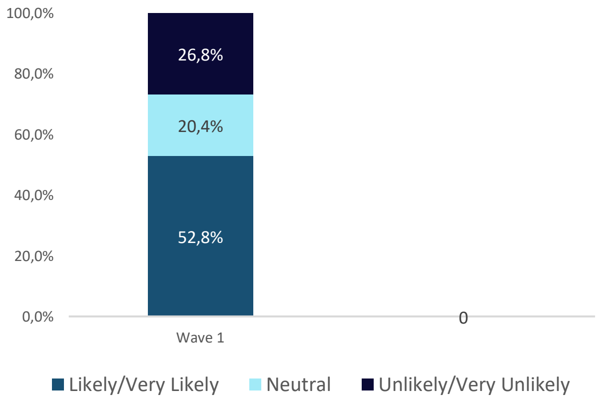
Q17.What type of leisure trip within Europe are you most likely to undertake next?

No. of respondents: 5,762

GERMANY

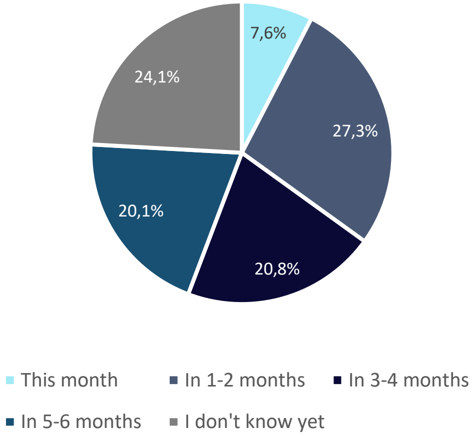
More than 1 in 2 respondents intend to travel in the next 6 months having similar preference for domestic and European destinations

Willingness to travel in the next 6 months



No. of respondents: 750

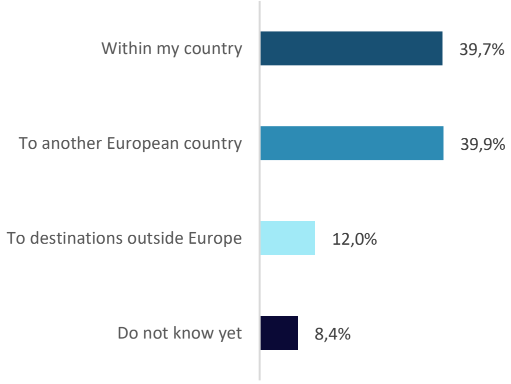
When will Germans travel



No. of respondents: 750

For specific dates please refer to slide 9

Where will Germans travel within the next 6 months



No. of respondents: 750

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

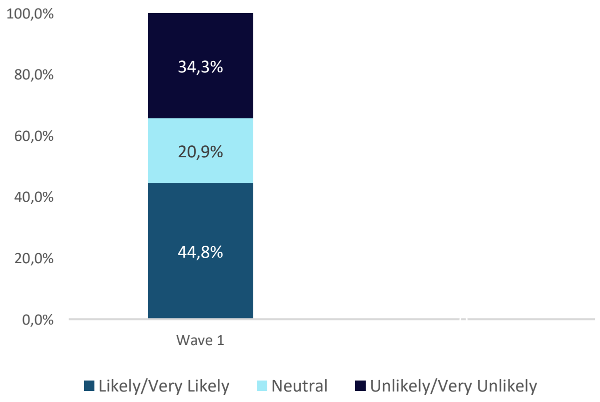
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

UNITED KINGDOM

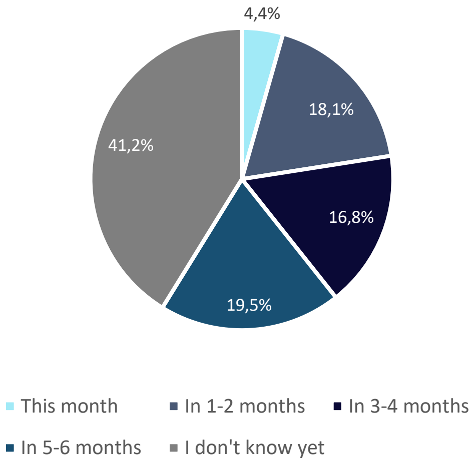
More than 4 in 10 respondents are uncertain as to the timing of their next trip, while they show a stronger preference for domestic destinations

Willingness to travel in the next 6 months



No. of respondents: 750

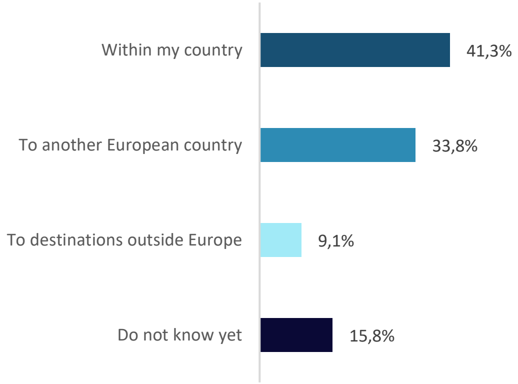
When will British travel



No. of respondents: 750

For specific dates please refer to slide 9

Where will British travel within the next 6 months



No. of respondents: 750

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

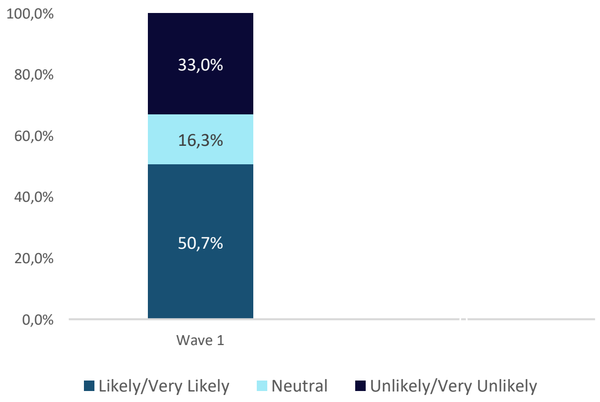
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

FRANCE

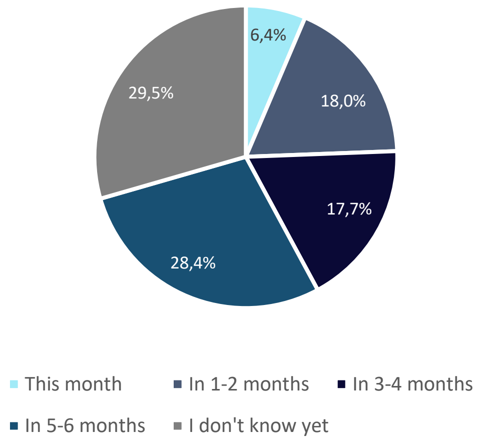
1 in 2 respondents intend to travel in the next 6 months, mostly in their own country

Willingness to travel in the next 6 months



No. of respondents: 750

When will French travel



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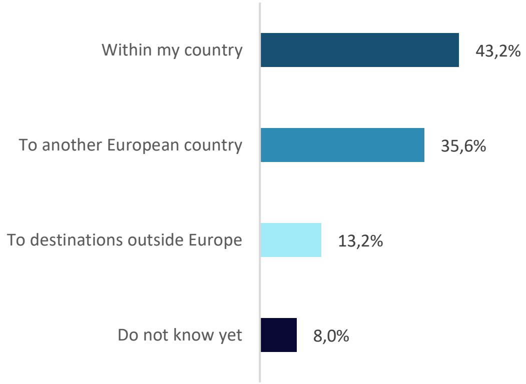
Where will French travel within the next 6 months



No. of respondents: 750

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

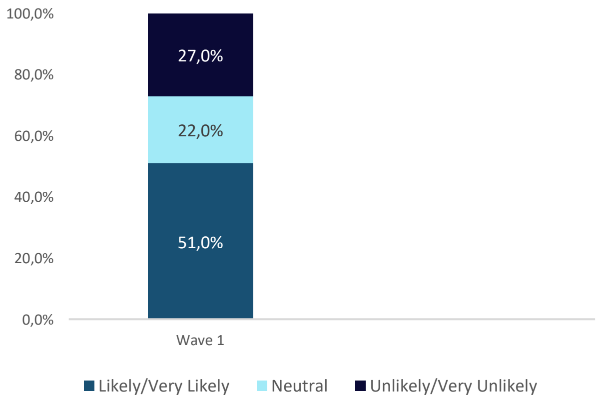
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

NETHERLANDS

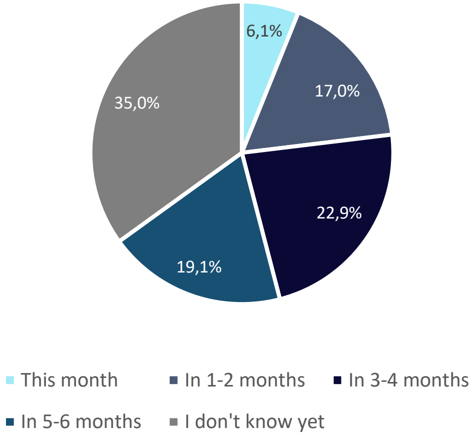
More than 1 in 2 respondents intend to travel in the next 6 months and by a large majority will visit other European destinations

Willingness to travel in the next 6 months



No. of respondents: 477

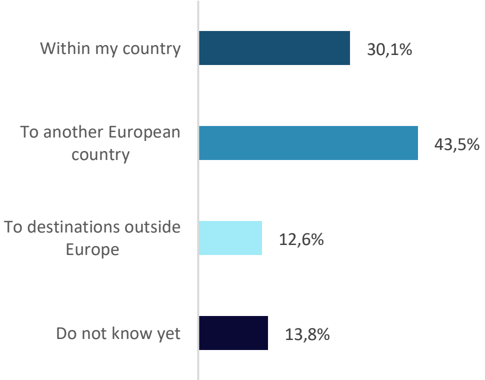
When will Dutch travel



No. of respondents: 477

For specific dates please refer to slide 9

Where will Dutch travel within the next 6 months



No. of respondents: 477

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

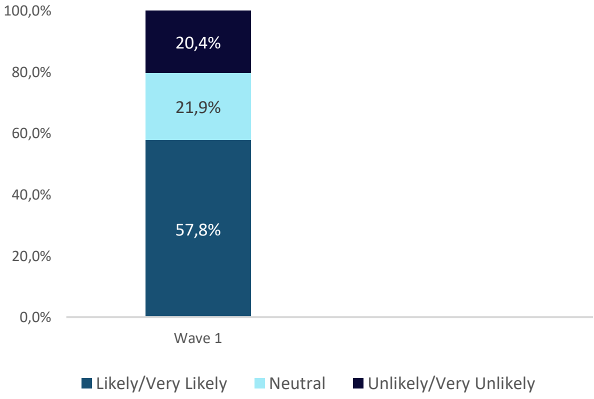
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

ITALY

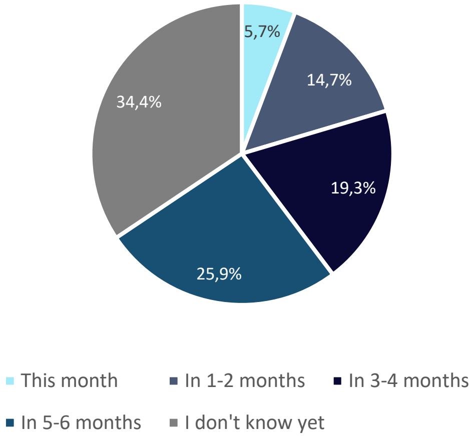
Almost 6 in 10 respondents intend to travel in the next 6 months, by a vast majority inside their own country

Willingness to travel in the next 6 months



No. of respondents: 750

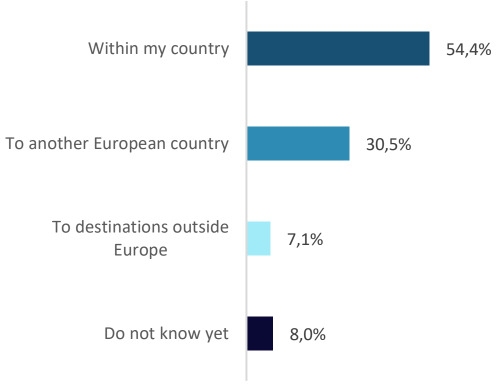
When will Italians travel



No. of respondents: 750

For specific dates please refer to slide 9

Where will Italians travel within the next 6 months



No. of respondents: 750

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

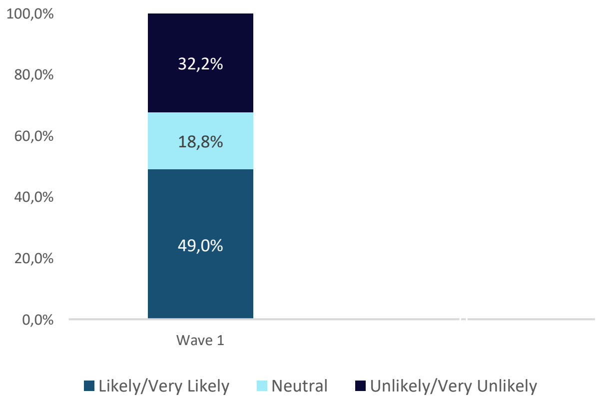
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

BELGIUM

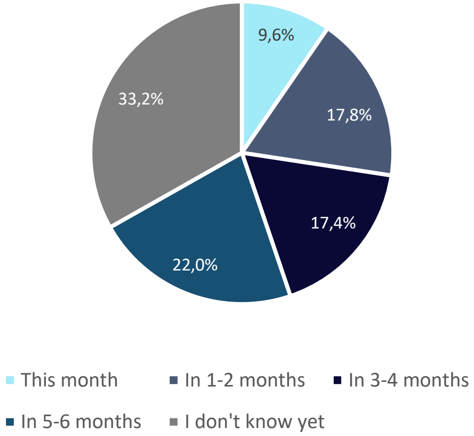
Almost 1 in 2 respondents intend to travel in the next 6 months, and the majority are eager to visit another European country

Willingness to travel in the next 6 months



No. of respondents: 500

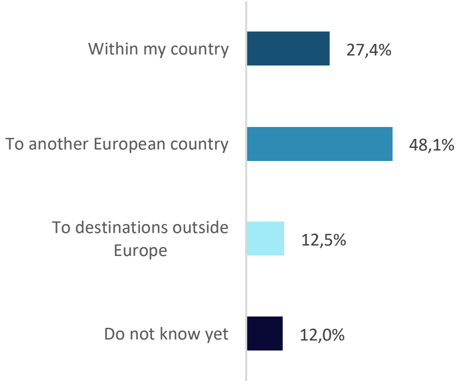
When will Belgians travel



No. of respondents: 500

For specific dates please refer to slide 9

Where will Belgians travel within the next 6 months



No. of respondents: 500

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

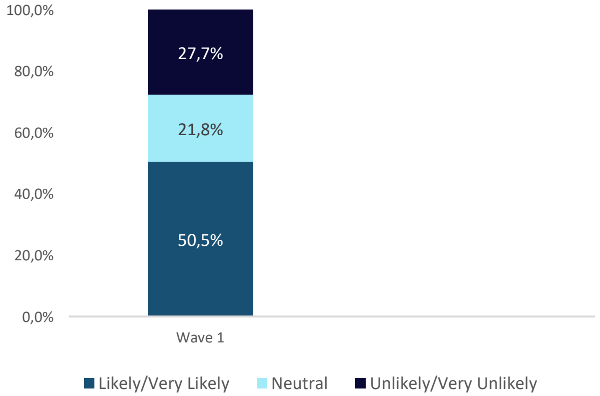
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

SWITZERLAND

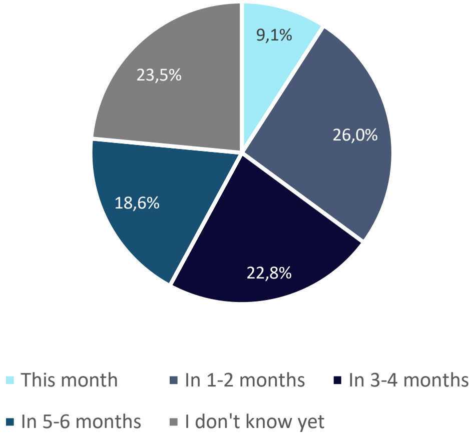
Nearly 1 in 2 respondents intend to travel in the next 6 months and tend to be more confident with respect to the timing of the trips planned

Willingness to travel in the next 6 months



No. of respondents: 285

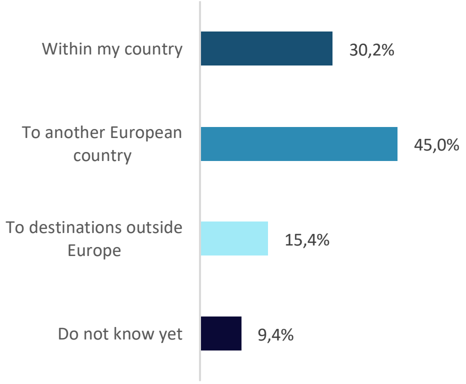
When will Swiss travel



No. of respondents: 285

For specific dates please refer to slide 9

Where will Swiss travel within the next 6 months



No. of respondents: 285

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

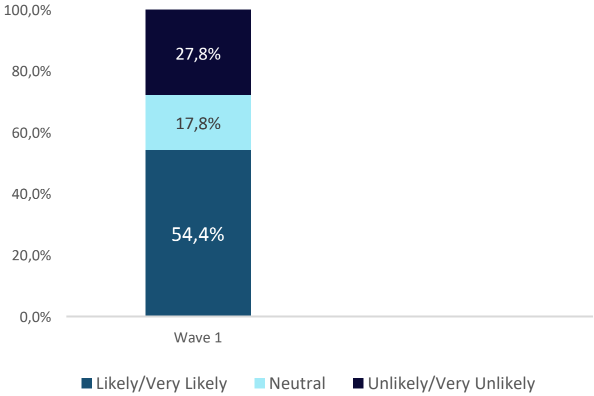
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

SPAIN

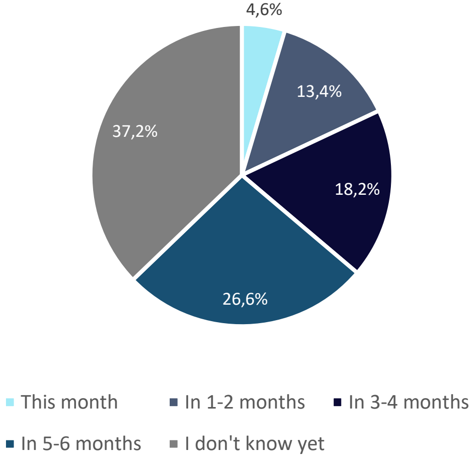
More than 1 in 2 respondents intend to travel over the next 6 months, mainly favoring domestic destinations

Willingness to travel in the next 6 months



No. of respondents: 500

When will Spanish travel



No. of respondents: 500

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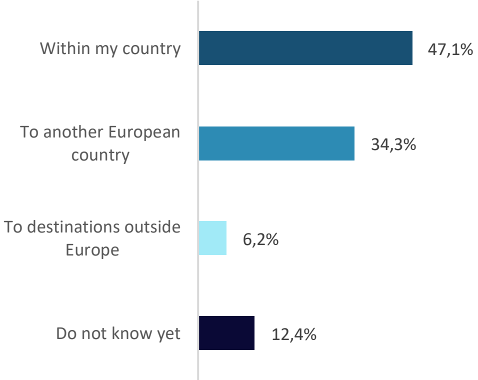
Where will Spanish travel within the next 6 months



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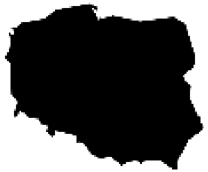
Q9.When are you most likely to go on your next trip either in your country or within Europe?

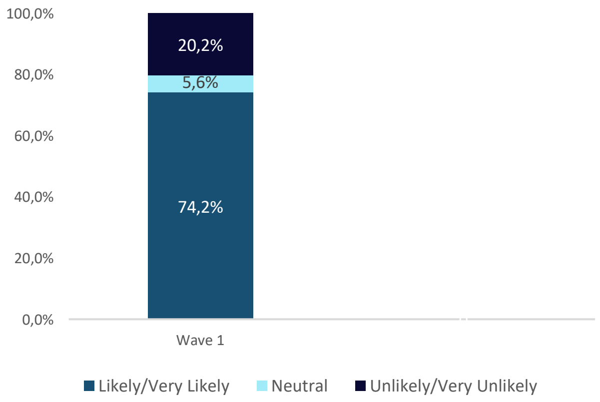
Q10.Where do you plan to travel in the next 6 months?

POLAND

The most avid travellers with 3 in 4 of respondents intending to travel soon and with a strong desire for outbound travel

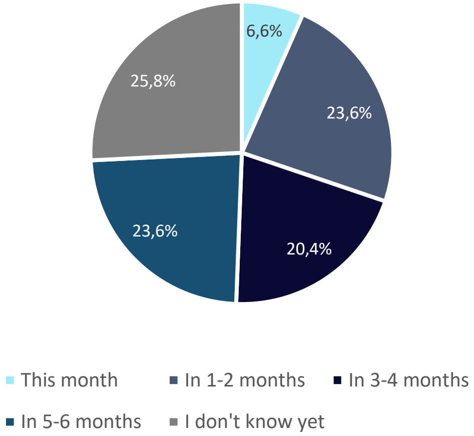


Willingness to travel in the next 6 months



No. of respondents: 500

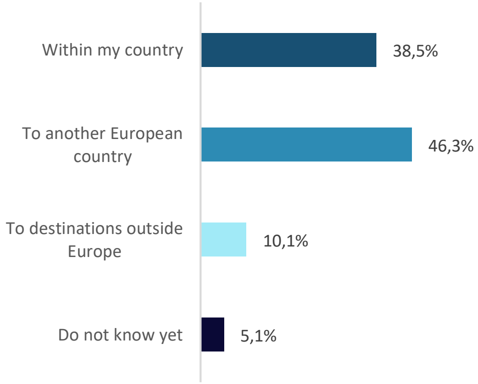
When will Polish travel



No. of respondents: 500

For specific dates please refer to slide 9

Where will Polish travel within the next 6 months



No. of respondents: 500

Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

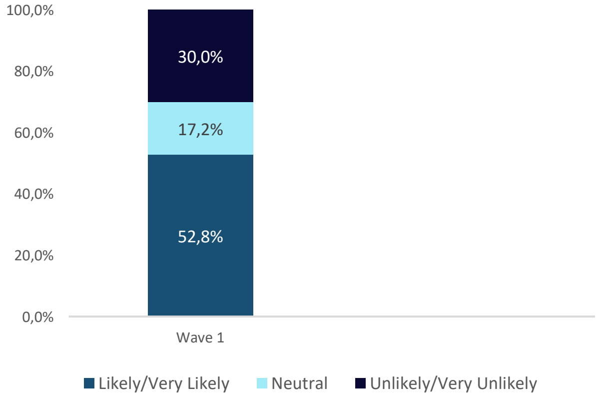
Q9.When are you most likely to go on your next trip either in your country or within Europe?

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

AUSTRIA

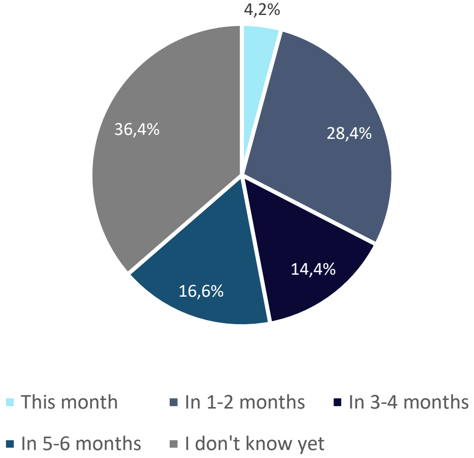
More than 1 in 2 respondents intend to travel in the next 6 months showing a similar preference for domestic and European destinations

Willingness to travel in the next 6 months



No. of respondents: 500

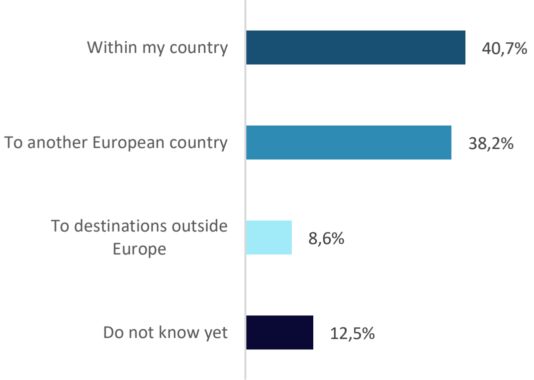
When will Austrians travel



No. of respondents: 500

For specific dates please refer to slide 9

Where will Austrians travel within the next 6 months



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

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

TRIP PLANNING

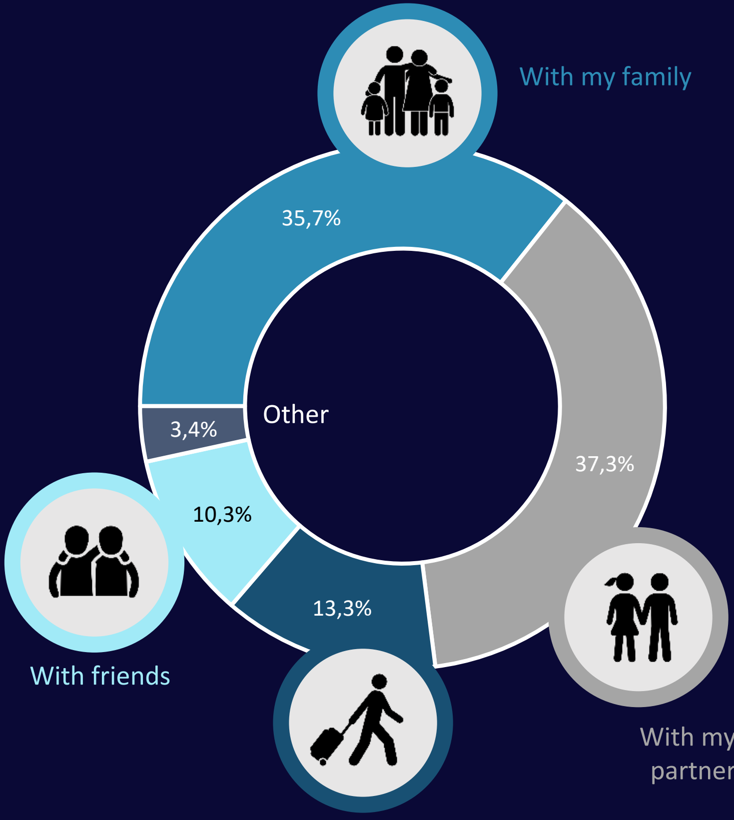
02

The majority of respondents with short-term travel plans, intend to travel either with their partner or family

Respondents between the ages of **35-54** are most likely to travel with their family, while respondents **over the age of 55** with their partner

Travelling with family (39%) or a partner (38%) is more common for **domestic** trips, while solo travel is strongly preferred (20%) among respondents who intend to visit destinations **outside of Europe**

Preferred travel companion for respondents most likely to travel in the next 6 months



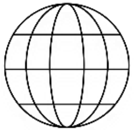
No. of respondents: 3,086

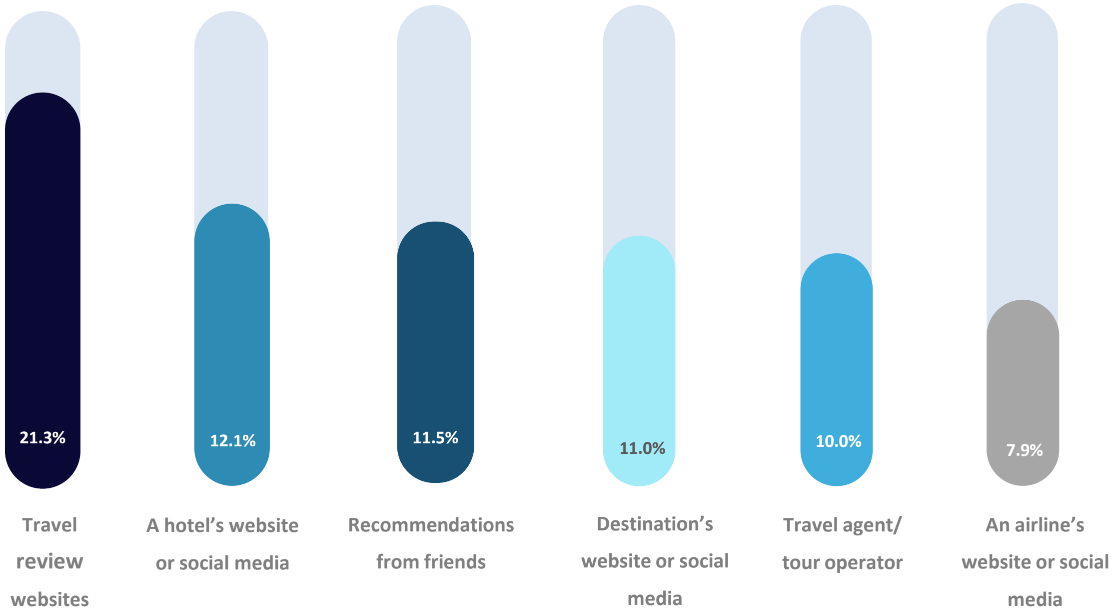
Q16.With whom are you most likely to travel during your next trip within Europe?

Travel review websites are the major source of information but hotels/ destinations' digital assets and recommendations from friends are also taken into account

2 out of 3

respondents will rely on digital sources when planning their next trip





NB: Sampling carried out through online survey thus it may contain bias towards digital usage

No. of respondents: 3,086

Q12.What sources of information will you use the most when planning your next trip?

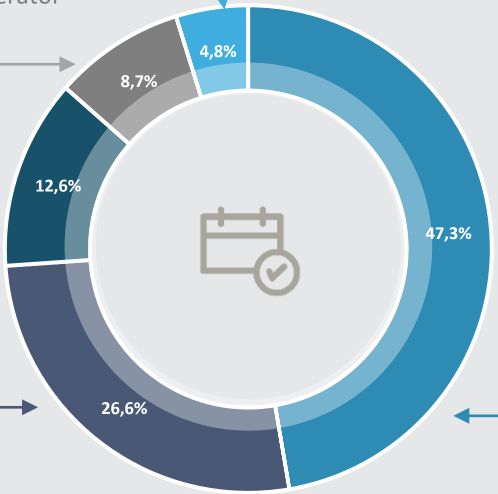
Online booking through OTAs and search engines prevails followed by direct bookings via accommodation/ airline websites

While digital booking is equally common among all age groups, the respondents over the age of 54 show a slightly higher preference for direct online booking

8.7%
Package holiday through a Tour Operator

4.8%
Corporate travel office

12.6%
Travel agent/ travel designer



47.3%
Online booking engine

26.6%
Direct booking via accommodation/ airline website

NB: Sampling carried out through online survey thus it may contain bias towards digital usage

No. of respondents: 3,086

Q13.How will you book your next trip within Europe?

While air flight remains the leading mode of transport, driving an owned car is not falling far behind

Top 5 markets which are most likely to travel by plane in the next 6 months

Spain
71.7%

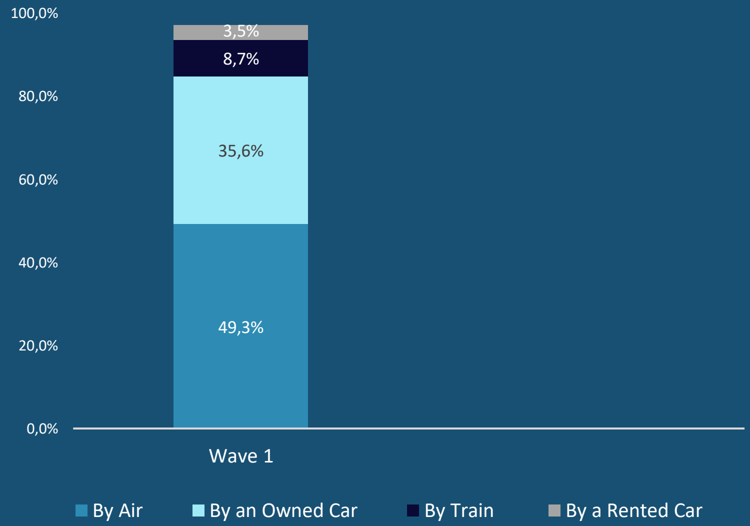
UK
67.0%

Italy
61.2%

France
56.6%

Poland
52.6%

Top 4 modes of transport for respondents most likely to travel in the next 6 months

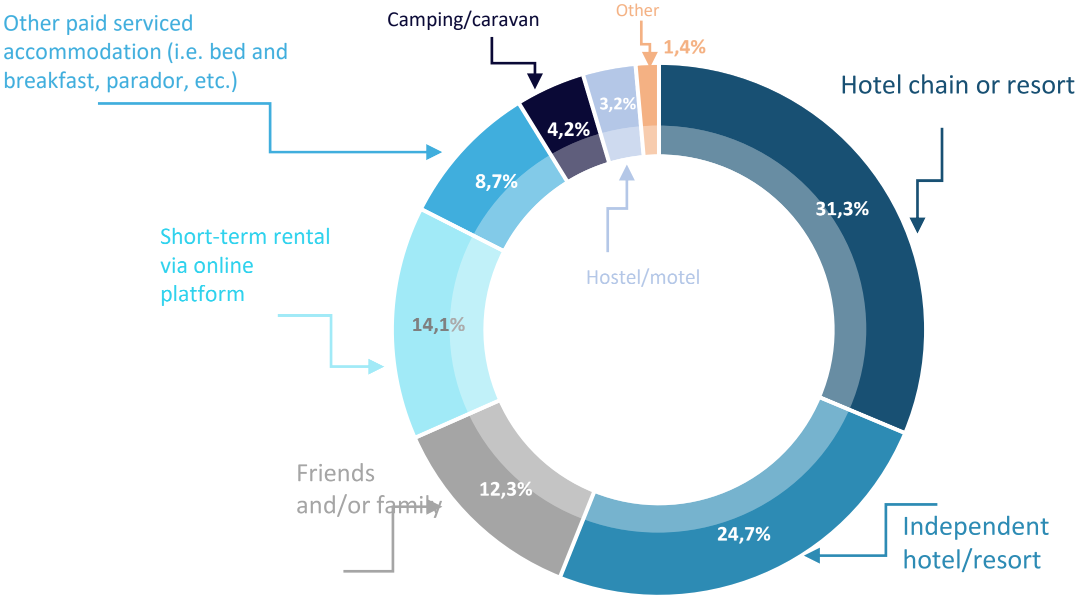


Q14.Which of the following modes of transport would you most consider using during your next trip within Europe?

No. of respondents: 3,086

Hotel or resort chains are the top choice of accommodation

Preferred type of accommodation for respondents most likely to travel in the next 6 months



Respondents from Spain, Austria, UK and Italy are the most likely to stay at a hotel or a resort (chain/ independent)

Camping and caravan travel are most popular among respondents from the Netherlands, Belgium and Germany

Q15.Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

No. of respondents: 3,086

Health and safety are by far the most important travel qualities while peace of mind, relaxation and affordability are also rated highly

The term "Travel Qualities" refers to the nature, traits and characteristics of the travel experience sought by consumers.

Q19.Which of the following qualities regarding travel are more important to you now compared to last year?

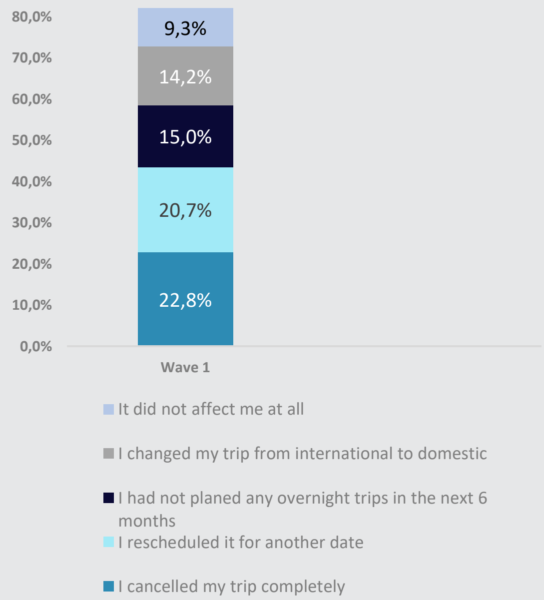
No. of respondents: 5,762

TRAVEL CONCERNS

03

Is COVID-19 truly a trip killer? While a majority of respondents cancelled their short-term travel plans, a significant portion either rescheduled or pivoted trips to domestic destinations

How has COVID-19 affected travel plans



Respondents aged 35-44 are the most resilient age group, taking their initial trip or making only a few changes

Top 5 markets which chose a domestic trip over international

Austria

26.2%

Poland

22.0%

Italy

20.0%

Spain

19.8%

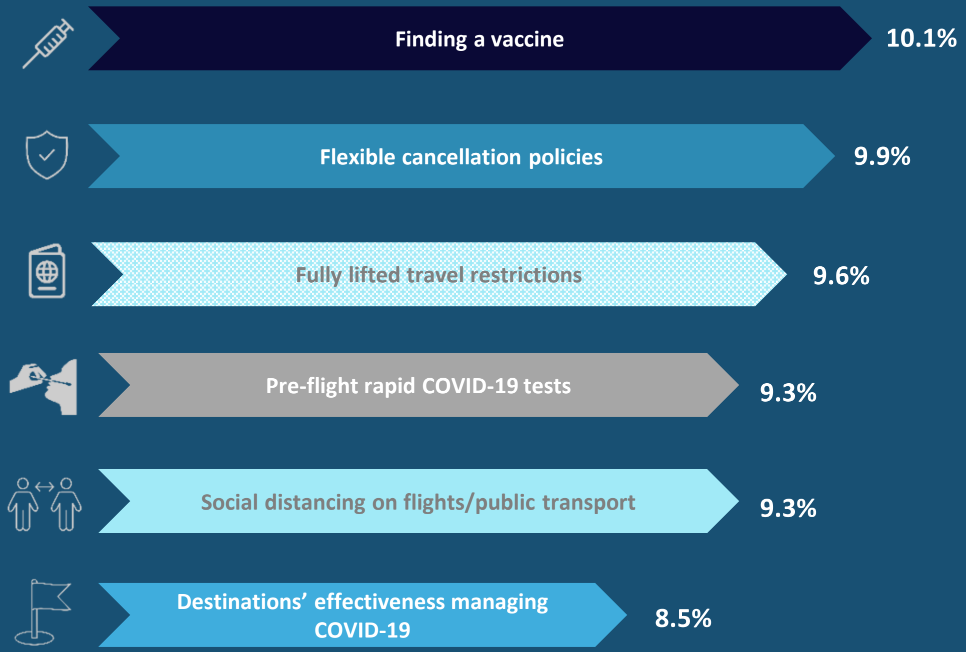
Germany

19.1%

Q2.If you had planned an overnight trip in the next 6 months within Europe, how does COVID-19 affect your plans?

No. of respondents: 5,762

Finding a vaccine for COVID-19 tops the list of factors in travel decision – making, followed very closely by flexible cancellation policies and the complete lifting in travel/ quarantine restrictions



In an era of uncertainty, **flexible cancellations policies** are a priority for encouraging consumers to book and much more important than offers and deals.

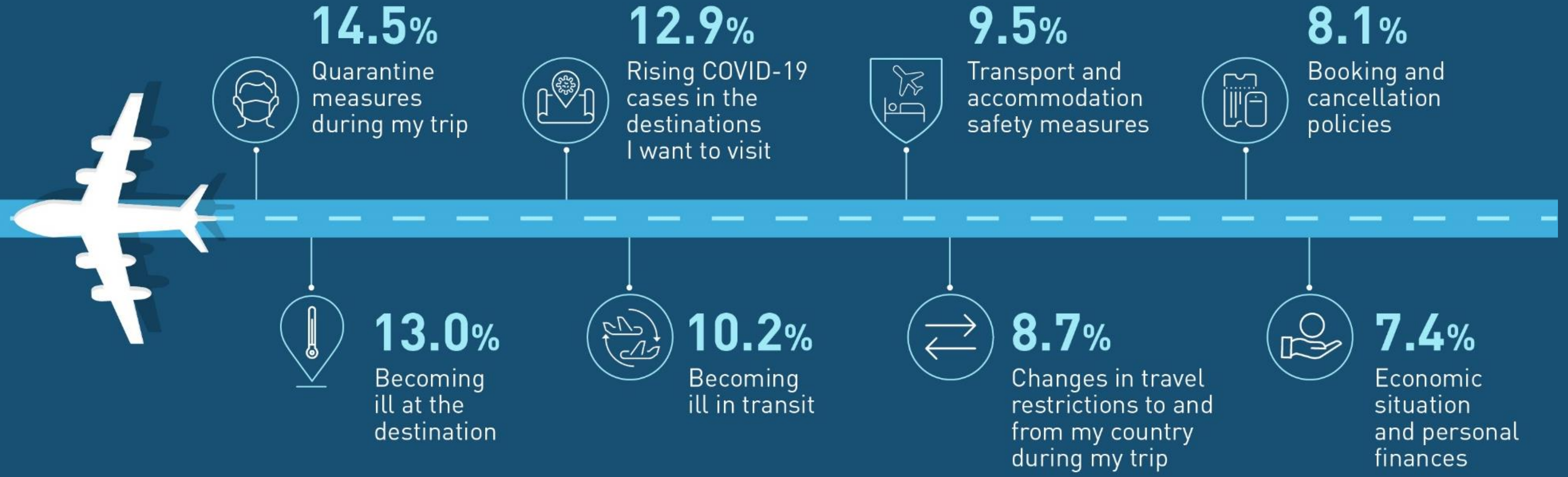
Especially among respondents more eager to travel in the next 6 months, flexibility in cancellation is the single most important factor (10.6%), followed by social distancing in flights/ public transport (9.2%) and only then followed by finding a vaccine (8.8%) and fully lifted travel restrictions (8.8%)

Q3.Which factors are currently most important to you when travelling within Europe?

No. of respondents: 5,762

SIZING UP TRAVEL ANXIETIES

While quarantine measures is the major issue impacting choices about travelling, health concerns at the destination also figure prominently

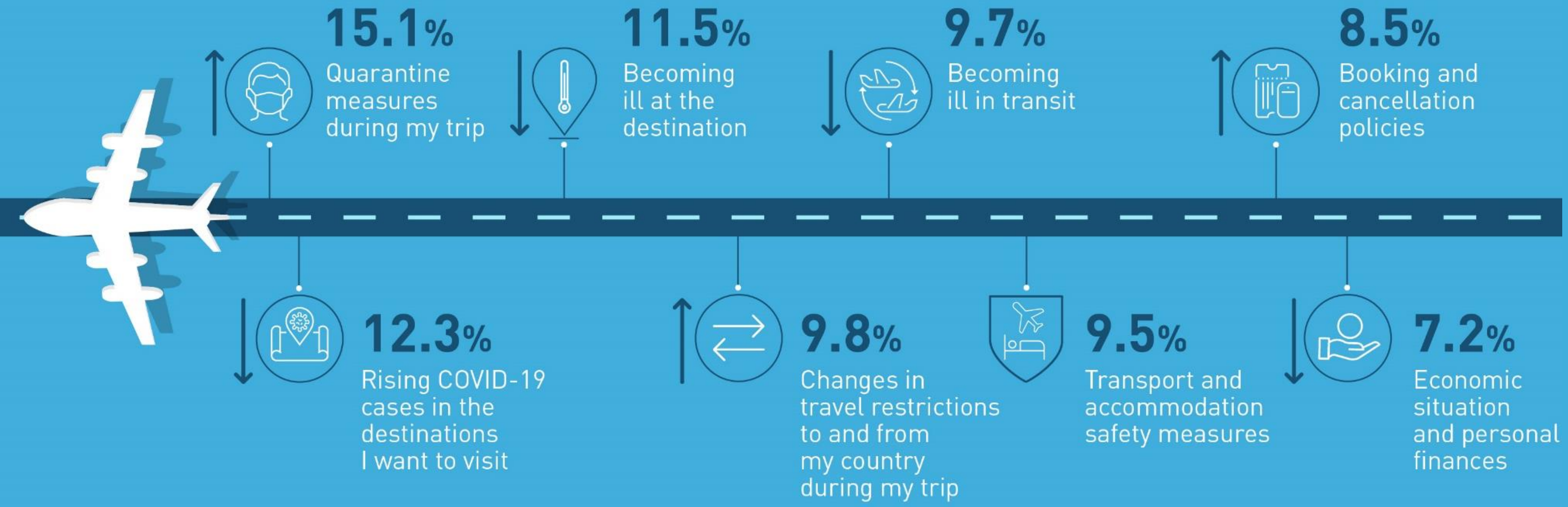


Q4.What currently concerns you the most about travelling within Europe?

No. of respondents: 5,762

TRAVEL CONCERNS OF "EARLY BIRD" TRAVELLERS

Bureaucratic/ administrative processes (i.e. quarantine, changes in travel restrictions, booking & cancellation policies) pose a greater concern for respondents with short-term travel plans

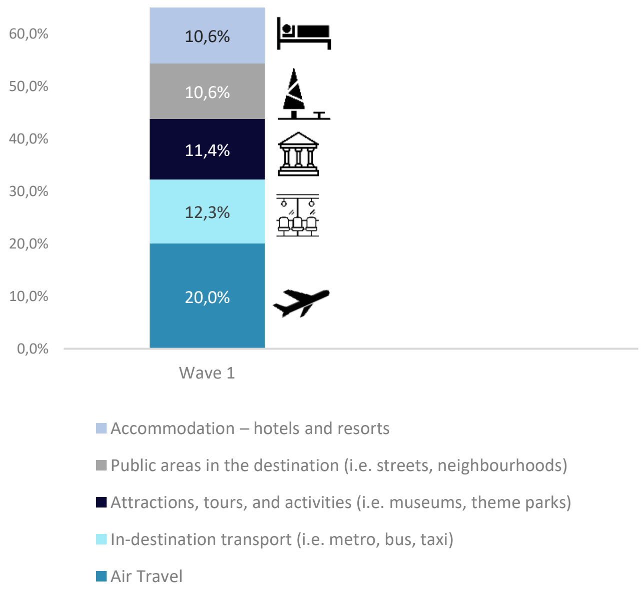


Q4.What currently concerns you the most about travelling within Europe?

No. of respondents: 3,086

By a wide margin, air travel is considered the least safe part of a trip, healthwise

Top 5 touch points of concern during travel in relation to personal health & safety



Concern regarding air travel increases with age: 51.2% of respondents aged 54+ are concerned by air travel, versus 39.5% in the 18-24 age group

In-destination transport (i.e. metro, bus, taxi), attractions, tours and activities as well as public spaces and accommodation are also considered important

Q5.In relation to your personal health and safety, which parts of your journey will concern you the most?

No. of respondents: 5,762

THE UNCERTAINTY CONTROL PANEL

4 KPIS SHOWCASE THE LEVEL OF UNCERTAINTY FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

The tourism industry has been impacted by high uncertainty regarding travellers' intentions and preferences as well as the ability for cross border travel. As the sector will move towards recovery, values of these KPI's are expected to lower

9.9%

9.9% of respondents state that they consider flexible cancellation policies as an important factor when travelling

8.1%

8.1% of respondents state that they consider booking and cancellation policies, a major concern about travelling

32.4%

32.4% of respondents state that they do now know when they intend to go on their next trip

10.4%

10.4% of respondents state that they do now know where they intend to travel in the next 6 months

No. of respondents: 5,762

METHODOLOGICAL ANNEX

04

METHODOLOGICAL ANNEX

THE SURVEY

- Online market research survey
- Distribution/ data collection period: 27 August 2020 - 15 September 2020
- Consumers with at least 2 overnight trips in 2019 participated in the survey
- 5,762 respondents in total, from 10 high-volume source markets
    - 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 (1 question), Travel concerns and COVID-19 impact on travel (6 questions), Travel intentions, preferences and trip planning (10 questions), COVID-19 and responsible travel (3 questions)
- 51% of respondents are male and 49% are female
- Number of respondents and age group per source country:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	74	96	100	75	183	92	145	**971**
	25 - 34	135	112	74	133	129	167	131	130	71	140	**1,222**
	35 - 44	126	135	101	143	141	161	132	87	53	110	**1,189**
	45 - 54	138	167	105	98	146	168	96	77	41	58	**1,094**
	>54	263	263	175	52	238	154	66	23	28	24	**1,286**
Total		**750**	**750**	**500**	**500**	**750**	**750**	**500**	**500**	**285**	**477**	**5,762**

This project is co-funded by the European Union

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 completely eliminate every margin of error.

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