MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

11/20 | WAVE 3

Co-funded by the European Union
WAVE 3
RESEARCH HIGHLIGHTS

This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the third out of six waves of market research, initiated in September 2020. Responses are collected from European citizens from 10 high-volume source markets in light of the COVID-19 crisis.

• As Europe experiences a spike in COVID-19 cases, respondents’ sentiment towards domestic and intra-regional travel deteriorated; 49.4% of Europeans intend to travel in the next six months¹ (an 8% drop compared to wave 2), with only a small proportion of respondents (17.1%) intending to make a trip by the end of January 2021.

• Due to the ongoing effect of COVID-19, the proportion of respondents who are not making any travel plans is currently 18.1%. This represents an increase of 17% compared to the results from wave 2.

• Still 45% of Europeans expect to re-schedule their pre-pandemic trip once a vaccine is found, a figure relatively consistent with all previous research waves. The positive progress with COVID-19 vaccine trials may reignite travel sentiment.

¹ Between November 2020 and May 2021
WAVE 3
RESEARCH HIGHLIGHTS

• The sentiment for domestic versus intra-European travel remains constant across all the research waves; **38.2% of respondents will travel domestically** and **37.8% will choose to visit another European country** for their next trip.

• Despite the pandemic’s effect on cities, **city breaks are still the most favoured type of trips** among 19.3% of respondents. However, with new travel restrictions, it will be a challenge for this positive sentiment to be translated into an actual demand.

• Other leading preferences include holidays in **nature and the outdoors** (15%), and trips for **culture and heritage** (14.4%). For Europeans willing to travel by the end of January 2021, a **trip in nature and the outdoors is slightly more popular** (17%).

• **50.8% of “early-bird” travellers¹** intend to fly, compared to 49.7% in the second research wave. **Travelling by car is the second most popular choice among 37.3% of respondents** with short-term travel plans.

¹ “Early-bird” travellers refers to survey respondents that are most likely to travel in the next 6 months
WAVE 3
RESEARCH HIGHLIGHTS

- Air travel continues to be the most worrisome part of a journey regarding personal health among 18.6% of Europeans, slightly down on the 20.0% of research wave 2.
- Restaurants and Bars were, for the first time, included in the top 5 most concerning parts of a journey for 11.3% respondents.
- Quarantine measures, fear of getting ill at the destination and rising COVID-19 cases continue to be major concerns for 15.4%, 12.8% and 12.6% of “early-bird” travellers respectively.
WAVE 3
RESEARCH HIGHLIGHTS

• Travel behaviours regarding the purpose of a trip, travel partner, type of accommodation and information sources retain similar positions to the previous research waves: Leisure and VFR are still the primary purposes of travel for 63.1% and 22.0% of respondents respectively.
• However, VFR is more popular among 27% of Europeans willing to travel for this season’s holidays.
• Europeans appear to display a similar preferences for travel with their partner (35.4%) and family (34.8%). Solo travel is preferred among 15% of “early-bird” travellers however is more popular for respondents intending to take a trip by the end of January 2021 (21%).
• The majority of respondents will stay at a branded (31.3%) or independent (23.3%) hotel and resort.
WAVE 3
RESEARCH HIGHLIGHTS

• A COVID-19 vaccine and flexible cancellation policies maintain a similar level of prominence among the factors for travel decision-making among 11.3% and 10.7% of respondents, respectively. Fully lifting travel restrictions (10.2%) and pre-travel COVID-19 tests (9.7%) follow closely behind them.

• “Health and Safety” is a key consideration for any sought-after travel experience for 21.6% of respondents. Its importance is even greater among Europeans over 55 years old (26%) and slightly lower for those under 24 years old (19%).

• Gen Z is looking more for Adventure (9%) and Fun (7%) experiences especially compared to older respondents (both experiences 3%, for respondents over the age of 55).
The report is also complemented by insights on travellers’ online sentiment for major European destinations for the period of October 2020 compared to October 2019.

- With **Gen Z respondents maintaining a hesitant travel sentiment**, their share of tourism-related social media mentions has fallen from 16% in October 2019 to 8.3% in October 2020.
- In October 2020, tourists’ satisfaction with the offering of European destinations fell by 8.2% compared to October 2019 and by 5.0% compared to September 2020. However, the current level of the **Tourism Product Index**\(^2\) (**65.7%**) still indicates a relatively high satisfaction level.
- The **Hotel Satisfaction Index**\(^2\) during October 2020 was **67%**, indicating a good level of satisfaction with accommodation in destinations. The October 2020 index demonstrates a positive momentum with a 2.7% increase on the October 2019 figure and a rise of 7.2% when compared to September 2020.

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\(^1\) Benchmark report for major European destinations, October 2020 compared to October 2019 (Mabrian Technologies, November 2020)

\(^2\) **Tourist Product/Hotel Satisfaction Indexes**, measure satisfaction levels of visitors to a destination with its offering (culture, gastronomy, sun and sea) & accommodation respectively.
WAVE 3
RECOMMENDATIONS FOR DESTINATIONS

• Although many urban destinations are under lockdown, city-breaks remain very popular. Destinations can capitalise and further enhance their digital offering with virtual tours and activities, live videos as well as Christmas soundtracks and podcasts, partnering with travel start-ups and media platforms.
• With VFR tourism on the rise, destinations could focus their campaigns on the desire of Europeans to responsibly visit their loved ones. Messaging should also stimulate and inspire emotions rather than over-emphasizing the Health and Safety angle.
• Destinations could develop staycation or business packages specifically designed for residents, including the use of hotels rooms as temporary offices.
• In-destination transport is a significant concern for travellers. Destinations should start developing a dedicated action plan for Spring – Summer 2021, focusing on H&S and widely communicate their initiatives.
WAVE 3
RECOMMENDATIONS FOR BUSINESSES

- Businesses may need to further invest in digital marketing and content development to maintain brand awareness, despite lockdowns. This could include creative content (such as DIY tips) based on “peacefulness” and fun or leveraging users’ testimonials. They may also promote branded products (i.e. amenities, apparel) or virtual services (i.e. meditation, cooking classes).
- Travel agents/designers could focus on adjusting their 2021 offering to respondents over the age of 55. This group is more likely to be interested in travel agent/designer services.
- As a way to capitalise on VFR tourism, attractions, Food & Beverage outlets and retail could deploy location-based ad campaigns, as well as discounts through social media platforms, to attract visitors.
- Businesses could plan and deploy internal communication campaigns as a meaningful way to stay connected with their employees and maintain personnel morale, engagement and build mental resilience.
Wave 3


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; October – November 2020.
   - In 3-4 months; January – March 2021.
   - In 5-6 months; March - May 2021.

3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents; 5,832
   - Respondents with short-term travel plans/ most likely to travel in the next 6 months (“early-bird travellers”); 2,880
   - Respondents selecting outbound European destinations; 3,951

4. Only significant changes between current and previous waves are shown; Significant changes refer to >2.5% for the total sample and >5% for the smaller samples, in absolute numbers. To indicate these changes, the following symbols were used:
   - Increasing ▲, decreasing ▼
   - Numbers next to the arrows reflect the percentage of change in the share of respondents selecting a specific response between current and previous waves

6. When mention of new COVID-19 cases is made, it refers to the data collection period.

7. All data and insights refer to domestic and intra-European travel, unless otherwise stated.
The share of Europeans planning to book a trip once a vaccine or treatment is found holds steady at 45%

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

- **Spain**: 63.8%
- **Poland**: 59.5%
- **UK**: 44.8% (13% increase)
- **Belgium**: 43.6% (19% increase)
- **Italy**: 52.8%

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

- **Wave 1**: Likely/Very Likely: 30.8%, Neutral: 44.0%, Unlikely/Very Unlikely: 25.2%
- **Wave 2**: Likely/Very Likely: 30.2%, Neutral: 45.1%, Unlikely/Very Unlikely: 24.7%
- **Wave 3**: Likely/Very Likely: 29.8%, Neutral: 45.4%, Unlikely/Very Unlikely: 24.8%

No. of respondents: 5,832

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”
As Europe experiences a spike in COVID-19 cases, travel sentiment shows a slight decline: the proportion of respondents intending to travel in the next 6 months drops by -8%.

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

- **Poland**: 67.8% (12%) decrease
- **France**: 51.7%
- **Austria**: 49.6% (17%) increase
- **Switzerland**: 48.5% (6%)
- **Spain**: 50.8% (17%)

![Intention to travel in the next 6 months chart](chart.png)

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: 5,932
Respondents aged 35-44 demonstrate a slightly greater desire to travel, while Gen Z respondents (aged 18-24) remain the least likely to take a trip in the coming months.

Domestic travelling is an alternative considered more by respondents over the age of 45, while travelling to another European country is more appealing for the 25-44 age groups.
Despite the effect of COVID-19 on urban areas, respondents more interested in city trips still show the strongest desire to travel.

Respondents most likely to travel in the next 6 months, per type of traveller:

- **Sun & beach lovers**
- **Bleisure travellers**
- **Business travellers**
- **Explorers of cultural identity & roots**
- **Immersive explorers**
- **City life enthusiasts**
- **Gastronomy lovers**

Wave 1:
- Sun & beach lovers: 13.3%
- Bleisure travellers: 4.5%
- Business travellers: 2.0%
- Explorers of cultural identity & roots: 3.9%
- Immersive explorers: 16.0%
- City life enthusiasts: 13.3%
- Gastronomy lovers: 4.5%

Wave 2:
- Sun & beach lovers: 13.3%
- Bleisure travellers: 4.3%
- Business travellers: 2.0%
- Explorers of cultural identity & roots: 4.2%
- Immersive explorers: 16.0%
- City life enthusiasts: 13.3%
- Gastronomy lovers: 4.2%

Wave 3:
- Sun & beach lovers: 13.3%
- Bleisure travellers: 5.5%
- Business travellers: 2.1%
- Explorers of cultural identity & roots: 4.7%
- Immersive explorers: 20.6%
- City life enthusiasts: 12.8%
- Gastronomy lovers: 15.4%

07. 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: 2,880
Lockdowns put Europeans’ travel plans on hold; respondents report a sharp -21% decline in intention to travel by the end of January 2021

Q9. When are you most likely to go on your next trip either in your country or within Europe?
No. of respondents: 5,832

Q10. Where do you plan to travel in the next 6 months?
No. of respondents: 5,832
PREFERRED COUNTRIES FOR THE NEXT INTRA-EUROPEAN TRAVEL

Spain, Italy and France continue to head the wish list; top 10 countries remain unchanged compared to Wave 2

TOP 10 COUNTRIES

Spain  8.2%
Italy   8.1%
France  7.1%
Germany 6.3%
Greece  5.6%
Portugal 4.6%
United Kingdom 4.4%
Croatia 3.8%
Austria 3.3%
Netherlands 3.1%

Please use this map as a reference only

*No significant changes between waves were recorded for this question.

No. of respondents: 3,951

Q11. To which country(ies) do you plan to travel next?
Leisure remains the leading purpose for travel, followed by visiting friends and relatives

Top 3 markets to resume leisure travel
- Poland: 73.2%
- Italy: 68.5%
- Belgium: 67.8%

Top 3 markets to resume business travel
- Austria: 12.1%
- France: 11.6%
- Spain: 11.0%

Purpose of travel for respondents most likely to travel in the next 6 months
- Wave 1:
  - For Leisure: 66.1%
  - For Business: 19.1%
  - To Visit Friends/Relatives: 8.8%
  - Other: 5.0%
- Wave 2:
  - For Leisure: 64.9%
  - For Business: 20.9%
  - To Visit Friends/Relatives: 8.7%
  - Other: 6.5%
- Wave 3:
  - For Leisure: 63.1%
  - For Business: 22.0%
  - To Visit Friends/Relatives: 9.3%
  - Other: 5.7%

No. of respondents: 2,880
Despite many European cities facing a new lockdown, the city break is still the top leisure trip preference.

- **14.4%** Sun & Beach
- **4.3%** Culinary/ Food & Wine
- **15.0%** Nature & Outdoors
- **10.3%** Coast & Sea
- **14.4%** Culture & Heritage
- **4.5%** Ski/Snowboard Trip in the Mountains
- **19.3%** City Break
- **8.8%** Wellness & Relaxation

*No significant changes between waves were recorded for this question.*

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

18% of respondents over the age of 55 are interested in culture and heritage as opposed to 11% of respondents aged 18-24.
Markets remain loyal to specific tourism products; Spaniards show the strongest interest in City Breaks, Germans and Belgians in Nature and Outdoors, while Italians favour Culture & Heritage.

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip, i.e. 37.2% of respondents from Spain are most likely to undertake a city break trip.
While Britons maintain a strong preference for Sun and Beach, Poles are now more interested in Coast and Sea; Swiss and Austrians keen on taking a ski/snowboard trip

<table>
<thead>
<tr>
<th>Country</th>
<th>Sun &amp; Beach</th>
<th>Coast &amp; Sea</th>
<th>Cruising</th>
<th>Ski/Snowboard trip in the mountains</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>26.0%</td>
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<tr>
<td>France</td>
<td>19.3%</td>
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<tr>
<td>Netherlands</td>
<td>18.2%</td>
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<tr>
<td>Germany</td>
<td>17.9%</td>
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<tr>
<td>Austria</td>
<td>17.4%</td>
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<td>Poland</td>
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<td>13.8%</td>
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<tr>
<td>Germany</td>
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<td>12.0%</td>
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<tr>
<td>Belgium</td>
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<td>11.0%</td>
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<td>France</td>
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<td>3.6%</td>
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<tr>
<td>France</td>
<td></td>
<td></td>
<td>4.6%</td>
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</tr>
</tbody>
</table>

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip, i.e. 26% of respondents from UK are most likely to undertake a sun and beach trip.

No. of respondents: 5,832
GERMANY

Willingness to travel declines, with Germans now more uncertain than ever about the exact timing of their trip

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>Neutral</td>
<td>Unlikely/Very Unlikely</td>
</tr>
<tr>
<td>26.8%</td>
<td>20.4%</td>
<td>52.8%</td>
</tr>
<tr>
<td>22.4%</td>
<td>20.1%</td>
<td>57.5%</td>
</tr>
<tr>
<td>29.9%</td>
<td>24.0%</td>
<td>46.1%</td>
</tr>
</tbody>
</table>

When will Germans travel?

- This month: 33%
- In 1-2 months: 20.1%
- In 3-4 months: 28.8%
- In 5-6 months: 20.8%
- I don’t know yet: 21.3%
- Do not know yet: 15.1%
- This month: 30%
- In 1-2 months: 26.5%
- In 3-4 months: 17.6%
- In 5-6 months: 16.1%
- I don’t know yet: 7.6%
- Do not know yet: 6.3%

Where will Germans travel within the next 6 months?

- Within my country: 39.7%
- To another European country: 36.9%
- To destinations outside Europe: 12.0%
- Do not know yet: 11.4%

For specific dates please refer to slide 10

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?

No. of respondents: 750
UNITED KINGDOM
Of all markets analysed, British respondents consistently display the least desire to travel in the next 6 months

![Graph showing willingness to travel](image)

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?

For specific dates please refer to slide 10

No. of respondents: 750
FRANCE
The French demonstrate a stable and quite positive travel sentiment, with domestic destinations being their most popular choice.

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

The Dutch register a slight increase in their willingness to travel, greatly favouring international over domestic trips.

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

Italians are more uncertain than ever about the exact timing of their trip, with their willingness to travel also dropping sharply.

Willingness to travel in the next 6 months

When will Italians travel?

For specific dates please refer to slide 10

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?

No. of respondents: 750
Belgium respondents are increasingly in favour of staycations, as their appetite for travel further shrinks.

**Willingness to travel in the next 6 months**

<table>
<thead>
<tr>
<th>Wave 1</th>
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<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>Neutral</td>
<td>Unlikely/Very Unlikely</td>
</tr>
<tr>
<td>32.2%</td>
<td>18.8%</td>
<td>49.0%</td>
</tr>
<tr>
<td>29.8%</td>
<td>16.6%</td>
<td>53.6%</td>
</tr>
<tr>
<td>31.8%</td>
<td>21.0%</td>
<td>47.2%</td>
</tr>
</tbody>
</table>

**When will Belgians travel?**

- Wave 1:
  - This month: 37.0%
  - In 1-2 months: 7.2%
  - In 3-4 months: 16.6%
  - In 5-6 months: 23.8%
  - I don’t know yet: 9.6%

- Wave 2:
  - This month: 39.8%
  - In 1-2 months: 7.2%
  - In 3-4 months: 19.8%
  - In 5-6 months: 17.8%
  - I don’t know yet: 6.6%

- Wave 3:
  - This month: 33.3%
  - In 1-2 months: 9.6%
  - In 3-4 months: 16.8%
  - In 5-6 months: 17.4%
  - I don’t know yet: 12.0%

**Where will Belgians travel within the next 6 months?**

- Within my country:
  - Wave 1: 28.9%
  - Wave 2: 22.5%
  - Wave 3: 27.4%
  - Total: 28%

- To another European country:
  - Wave 1: 44.6%
  - Wave 2: 50.3%
  - Wave 3: 48.1%
  - Total: 49.4%

- To destinations outside Europe:
  - Wave 1: 14.5%
  - Wave 2: 13.8%
  - Wave 3: 12.5%
  - Total: 14.8%

- Do not know yet:
  - Wave 1: 11.9%
  - Wave 2: 13.4%
  - Wave 3: 12.0%
  - Total: 14.3%

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

For the Swiss, although desire for travel bounces back, uncertainty about the exact timing and destination for their next trip grows

Willingness to travel in the next 6 months

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<tr>
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</tr>
<tr>
<td>50.5%</td>
<td>41.6%</td>
<td>48.5%</td>
</tr>
<tr>
<td>21.8%</td>
<td>27.3%</td>
<td>20.4%</td>
</tr>
</tbody>
</table>

When will Swiss travel?

- This month: 19% (Wave 1), 17% (Wave 2), 16% (Wave 3)
- In 1-2 months: 23% (Wave 1), 25% (Wave 2), 24% (Wave 3)
- In 3-4 months: 19% (Wave 1), 20% (Wave 2), 18% (Wave 3)
- In 5-6 months: 27% (Wave 1), 25% (Wave 2), 27% (Wave 3)
- I don’t know yet: 6% (Wave 1), 4% (Wave 2), 5% (Wave 3)

Where will Swiss travel within the next 6 months?

- Within my country: 27.5% (Wave 1), 34.2% (Wave 2), 30.0% (Wave 3)
- To another European country: 15.6% (Wave 1), 15.9% (Wave 2), 15.4% (Wave 3)
- To destinations outside Europe: 43.6% (Wave 1), 42.0% (Wave 2), 43.0% (Wave 3)
- Do not know yet: 13.3% (Wave 1), 8.0% (Wave 2), 9.4% (Wave 3)

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?
1 in 2 Spanish respondents have a positive sentiment towards travel, showing a consistently high interest in domestic trips.

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?

For specific dates please refer to slide 10.

SPAIN

Willingness to travel in the next 6 months

When will Spaniards travel?

Where will Spaniards travel within the next 6 months?

For specific dates please refer to slide 10.
POLAND

The Polish desire for travel holds top spot among the surveyed markets, despite a minor drop.

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?

For specific dates please refer to slide 10.
AUSTRIA

Austrians’ overall attitude to travel remains consistent over time, with intra-European and domestic trips equally popular

Willingness to travel in the next 6 months

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<tr>
<td>Neutral</td>
<td>52.8%</td>
<td>51.2%</td>
<td>49.6%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>17.2%</td>
<td>19.2%</td>
<td>18.6%</td>
</tr>
</tbody>
</table>

When will Austrians travel?

Wave 1
- This month: 42.0%
- In 1-2 months: 22.0%
- In 3-4 months: 14.4%
- In 5-6 months: 14.4%
- I don’t know yet: 14.4%

Wave 2
- This month: 42.0%
- In 1-2 months: 22.0%
- In 3-4 months: 14.4%
- In 5-6 months: 14.4%
- I don’t know yet: 14.4%

Wave 3
- This month: 42.0%
- In 1-2 months: 22.0%
- In 3-4 months: 14.4%
- In 5-6 months: 14.4%
- I don’t know yet: 14.4%

Where will Austrians travel within the next 6 months?

- Within my country: 37.2% (Wave 1), 37.5% (Wave 2), 37.5% (Wave 3)
- To another European country: 36.4% (Wave 1), 37.1% (Wave 2), 38.2% (Wave 3)
- To destinations outside Europe: 9.5% (Wave 1), 7.2% (Wave 2), 8.6% (Wave 3)
- Do not know yet: 15.8% (Wave 1), 14.3% (Wave 2), 12.5% (Wave 3)

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?
More than 2 in 3 Europeans surveyed will travel with their partner or family, a consistent fact across all research waves.

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

- With my family: 35.4%
- With my partner: 34.8%
- With friends: 15.0%
- By myself: 11.5%
- Other: 3.4%

38% of respondents that consider a city break trip will be joined by their partner, while only 30% will be accompanied by their family.

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

No. of respondents: 2,880
The ranking of various sources of information remains the same over time; 2 in 3 Europeans intend to plan their next trip online.

Top 10 preferred sources of information for respondents most likely to travel in the next 6 months:

- **Travel review websites**: 20.8%
- **Recommendations from friends**: 12.2%
- **A hotel website or social media**: 11.8%
- **Destination website or social media**: 10.9%
- **Travel agent/tour operator**: 10.5%
- **An airline website or social media**: 7.7%
- **An online travel video on YouTube, Facebook, etc.**: 7.1%
- **Newspaper/magazine articles**: 5.8%
- **Digital content from someone followed on Social Media**: 4.5%
- **TV show/OnDemand/podcast**: 3.8%

* No significant changes between waves were recorded for this question.

Q12. What sources of information will you use the most when planning your next trip?
Over 7 out of 10 Europeans will book their next trip through digital platforms, while the preference for the travel agent/designer is stable.

19% of respondents planning to travel outside Europe will book via a travel agent/designer.

46.5% Online booking engine

25.5% Direct booking via accommodation/airline website

14.6% Travel agent/travel designer

8.0% Package holiday through a Tour Operator

5.3% Corporate travel office

NB: Sampling carried out through online survey thus it may contain bias towards digital usage.
No. of respondents: 2,880
While half of respondents are planning to fly on their next trip, air travel demand in Europe is still well below its 2019 level*

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

- **UK** 69.8%
- **Spain** 69.7%
- **France** 58.6%
- **Poland** 50.2%
- **Italy** 62.9%

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

*According to IATA’s report for Europe, November 2020

No. of respondents: 2,880

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

<table>
<thead>
<tr>
<th></th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>By Air</td>
<td>33.6%</td>
<td>34.0%</td>
<td>33.8%</td>
</tr>
<tr>
<td>By Owned Car</td>
<td>49.3%</td>
<td>49.7%</td>
<td>50.8%</td>
</tr>
<tr>
<td>By Train</td>
<td>9.0%</td>
<td>9.2%</td>
<td>9.2%</td>
</tr>
<tr>
<td>By Rented Car</td>
<td>8.7%</td>
<td>9.2%</td>
<td>9.2%</td>
</tr>
</tbody>
</table>
Accommodation preferences remain steady across research waves, with over half of respondents favouring a stay at a hotel or resort

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

- Hotel chain or resort: 31.3%
- Independent hotel/resort: 24.7%
- Friends and/or family: 23.3%
- Short-term rental via online platform: 14.1%
- Hostel /motel: 13.7%
- Other paid serviced accommodation (i.e. bed and breakfast, parador, etc.): 10.3%
- Camping/caravan: 9.1%

26% of respondents travelling as a couple prefer independent hotels/resorts compared to 22% of family travellers

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

No. of respondents: 2,880
Health and safety, peace of mind and affordability have consolidated their positions as leading travel qualities during the persisting pandemic.

- **21.6%** Health & Safety
- **13.7%** Relaxation & Peace of mind
- **11.6%** Affordability
- **9.8%** Comfort
- **6.1%** Discovery
- **5.3%** Adventure

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

* No statistically significant changes between waves were recorded for this question.

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

No. of respondents: 5,832
The proportion of Europeans not planning any trips in the next 6 months grows (+17%), as the second wave of COVID-19 infections persists.

1 out of 4 respondents over the age of 55 do not plan to travel in the next 6 months.

Top 5 markets which chose a domestic trip over international because of COVID-19:

- **Austria**: 19.6%
- **Poland**: 19.0% (-13%)
- **Italy**: 14.7%
- **Netherlands**: 14.6% (+26%)
- **Germany**: 14.3% (-23%)

Q2. If you had planned an overnight trip in the next 6 months within Europe, how does COVID-19 affect your plans?
“Finding a vaccine for COVID-19” and “flexible cancellation policies” remain key to travel decision-making among Europeans

- Finding a vaccine: 11.3%, 10.0%, 10.1%
- Flexible cancellation policies: 10.7%, 10.4%, 9.9%
- Fully lifted travel restrictions: 10.2%, 9.5%, 9.6%
- Pre-travel COVID-19 tests: 9.7%, 9.1%, 9.3%
- Destinations’ effectiveness managing COVID-19: 8.9%, 8.4%, 8.5%
- Social distancing on flights/public transport: 7.8%, 9.2%, 9.3%

* No significant changes between waves were recorded for this question.

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

No. of respondents: 5,832
SIZING UP TRAVEL ANXIETIES

Europeans position quarantine measures as the leading concern when travelling within Europe with personal finances still less of a worry

Leading concerns for travelling in Europe

- **14.7%** Quarantine measures during my trip
- **13.3%** Rising COVID-19 cases in the destinations I want to visit
- **8.5%** Transport and accommodation safety measures
- **7.8%** Economic situation and personal finances
- **13.4%** Becoming ill at the destination
- **10.5%** Becoming ill in transit
- **8.4%** Changes in travel restrictions to and from my country during my trip
- **7.8%** Booking and cancellation policies

*No significant changes between waves were recorded for this question.
Q4. What currently concerns you the most about travelling within Europe?
TRAVEL CONCERNS OF “EARLY BIRD” TRAVELLERS

Top concerns for “early-bird” travellers include a combination of health and administrative issues

Leading concerns for those who are most likely to travel next

15.4% Quarantine measures during my trip
12.6% Becoming ill at the destination
9.8% Becoming ill in transit
8.6% Booking and cancellation policies
7.7% Economic situation and personal finances
12.8% Rising COVID-19 cases in the destinations I want to visit
9.1% Changes in travel restrictions to and from my country during my trip
8.4% Transport and accommodation safety measures

* No significant changes between waves were recorded for this question.
Q4. What currently concerns you the most about travelling within Europe?

No. of respondents: 2,880
Nearly 1 in 3 respondents feel anxious about getting on a plane or using public transport at the destination.

The most worrisome touch points during travel in relation to personal health & safety (Top 5):

- **Food and beverage**
- **Accommodation – hotels and resorts**
- **Public areas in the destination (i.e. streets, neighbourhoods)**
- **Attractions, tours, and activities (i.e. museums, theme parks)**
- **In-destination transport (i.e. metro, bus, taxi)**
- **Air Travel**

"Accommodation – hotels and resorts" remains steady (10.5%) but is outnumbered by the importance of "Food and Beverage outlets" in the top-5.
THE UNCERTAINTY CONTROL PANEL

The second wave of COVID-19 as well as new lockdowns across Europe, weighs on Europeans’ confidence to travel

4 KPIs illustrating the level of uncertainty for domestic and intra-European travel

10.7% of respondents consider flexible cancellation policies as an important factor in travel decision-making

7.8% of respondents position booking and cancellation policies as one of the main concerns related to travelling

38.8% of respondents state that they do not know when they will travel next

12.8% of respondents state that they do not know where they intend to travel to in the next 6 months

No. of respondents: 5,832
METHODOLOGICAL ANNEX
Online market research. Survey participants are consumers with at least 2 overnight trips in 2019.

Distribution/data collection period:
- Wave 1: 27 August 2020 - 15 September 2020; sample = 5,762
- Wave 2: 21 September 2020 – 9 October 2020; sample = 5,876
- Wave 3: 19 October 2020 – 6 November 2020; sample = 5,832
- 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)

Wave 3: 50% of respondents are male and 50% are female

Wave 3 - Number of respondents and age group per source country:

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<th>ES</th>
<th>AT</th>
<th>FR</th>
<th>DE</th>
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<td>25-34</td>
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<td>500</td>
<td>715</td>
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<td>479</td>
<td>500</td>
<td>388</td>
<td>500</td>
<td>5,832</td>
</tr>
</tbody>
</table>
METHODOLOGICAL ANNEX

TRAVELLERS’ ONLINE SENTIMENT

- **Objective:** Benchmark major European tourism destinations in terms of tourist satisfaction and interests based on social media mentions.
- **Destinations:** United Kingdom, France, Netherlands, Croatia, Belgium, Germany, Italy, Greece, Portugal, and Spain.
- **Origin markets:** Germany, United Kingdom, France, Spain, Italy, Switzerland, Belgium, Netherlands, Poland, and Austria.
- The following indicators are analysed:
  - **TPI > The Tourist Products Index**, measures the level of satisfaction with the offer [products] of the destination in its various categories: Cultural, Gastronomic, etc. This index is obtained by analysing the distribution of positive, negative and neutral comments on Twitter and TripAdvisor.
  - **HIS > The Hotel Satisfaction Index**, measures the level of visitor satisfaction with the entire accommodation sector of a destination based on relevant comments that guests make on TripAdvisor, Expedia, and Booking.
  - Indexes are calculated by using advanced Natural Language Processing, Artificial Intelligence and Machine Learning techniques to analyse millions of spontaneous tourist interactions on social media or reviews sites.
  - **Index scoring system:** The calculated indices show values between 0 and 100 points as follow:
    - 0 to 24 points: **Very low levels of satisfaction and confidence** and therefore a priority area for reconfiguration.
    - 25 to 49 points: **Relatively low level of satisfaction and confidence.** Considerable potential for improvement.
    - 50 to 74 points: **Good to very good satisfaction level.** Moderate potential for improvement.
    - 75 to 100 points: **Excellent satisfaction and confidence** levels. In some cases there are margins for improvement, although most of them constitute level to maintain and consolidate.

For a more detailed description about the specific indices please visit the following link.
Co-funded by the European Union

Study on Monitoring Sentiment for Intra-European Travel

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Data sources: This report is based on research conducted by MINDHAUS (www.mindhaus.eu) in collaboration with Mabrian Technologies (www.mabrian.com) 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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