MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 8 | 09/21
WAVE 8

RESEARCH HIGHLIGHTS

This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the 8th wave of market research initiated in September 2020. Responses are collected from Europeans in 10 high-volume source markets, in light of the COVID-19 crisis.

- Travel sentiment remains high, with 68% of Europeans planning to travel between July 2021 and January 2022.
- The COVID-19 vaccine is key to tourism recovery: half (50%) of Europeans plan to book a trip once vaccinated and over half (54%) confirm that the vaccine made them more optimistic and confident regarding travel.
- 57% of respondents strongly agree/agree that the introduction of the EU digital COVID-19 certificate will facilitate travel planning.
- When planning a trip, Europeans primarily desire enjoying life in a relaxing environment (17%), escaping from routine (16%) and spending quality time with family or friends (14%).

1 The data collection and research methodology are detailed in the methodological annex (slide 44).
Europeans’ desire for leisure travel reached its highest share of all research waves over the summer months (72% of ‘early-bird’ travellers).

53% of Europeans planning to travel in the next 6 months aim to visit another European country – the highest level since September 2020. 56% of ‘early-bird’ travellers focused on July-September, while 37% plan to travel between October 2021 and January 2022.

Europeans with short-term travel plans shared preferences for spending their next holiday out in the fresh air, whether on sun & beach (23%), coast & sea (15%) or nature & outdoors trips (13%).

At the same time, an increasing number of respondents favour travelling by car (40%), while their preference for air travel dropped to its lowest point (46%) since September 2020, partially due to the strong interest in domestic travel (35%) and visiting neighbouring countries (30%).

1 in 3 of ‘travel-ready’ Europeans are planning a 4–6-night trip, and half will invest 500–1,500 euros on their next holiday. A third (34%) of them have chosen a destination, but not yet booked, and 29% have fully booked their next trip.

1 ‘Early-bird’ travellers/ ‘travel-ready’ Europeans refer to survey respondents who are most likely to travel in the next 6 months/ have short term travel plans.
Slowly adjusting to living alongside COVID-19, the share of respondents who refrained from planning a trip dropped to its lowest point (16%).

The top 3 factors boosting travellers' confidence in planning a trip between October-November are getting vaccinated (37%), pre-travel COVID-19 tests (20%) and destinations’ effectiveness in managing COVID-19 (20%).

The most worrisome parts of a journey in relation to personal health and safety remain the air travel (17%), in-destination transport (15%) and food & beverage (13%).
The strong link between vaccination and travel confidence endures. **Destinations should maintain their focus on countries that top the vaccination uptake list and on age groups with a high share of fully vaccinated consumers**.  

Destinations should further enhance strict health & safety protocols and **highlight their positive performance in limiting the spread of COVID-19** in response to travellers’ acute concerns about destinations’ COVID-19 case levels and effective management of the pandemic.

With increasing interest in road trips and in outdoor holidays, destinations could co-create **themed intra-regional car routes based on visitors’ interests** to help disperse visitor flows and build inter-regional tourism partnerships.

Responding to Europeans’ taste for 4-6-night city breaks, **urban destinations can promote in-depth experiences, such as local cultural events, multi-day workshops and day trips to nearby places** to attract longer stays that result in greater economic contributions.

* Up-to-date data on vaccination by country and age group can be found at the [ECDC website](https://www.ecdc.europa.eu/en).
Taking advantage of Europeans’ positive travel sentiment, businesses could offer early-bird deals for Q4 2021 that focus on driving-distance audiences and that have flexible booking terms.

Businesses catering for families should highlight their offer as a way to spend quality time together and re-connect, while businesses focusing on couples should spotlight romantic leisure time and enjoying life in a relaxing environment.

Hotels should focus on short booking windows, as 44% of ‘early-bird’ travellers have chosen where they want to go but have not yet booked their accommodation.

Utilising unsold room inventory through negotiating with carefully selected content creators could be a way for independent hotels and resorts to further communicate their brand, provide engaging content and drive direct sales.

In response to Europeans’ concerns and declining interest in air travel, aviation stakeholders should promote last-minute deals, flexible cancellation policies and the strict implementation of health & safety protocols at airports and in-flight.
CONTENTS

01. TRAVEL INTENTIONS P. 9
02. TRIP PLANNING P. 29
03. TRAVEL CONCERNS P. 37
04. METHODOLOGICAL ANNEX P. 43
1. Dates on the graphs refer to the following data collection periods for each research wave:

<table>
<thead>
<tr>
<th>Surveys dates</th>
<th>Wave 5</th>
<th>Wave 6</th>
<th>Wave 7</th>
<th>Wave 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 Dec ’20 – 7 Jan ’21</td>
<td>5-19 Feb ’21</td>
<td>19-29 May ’21</td>
<td>13-23 July 2021</td>
<td></td>
</tr>
</tbody>
</table>

2. To present Wave 8 timings in which respondents are most likely to take their next trip, the following time periods should be used as a reference:
   - This month; July 2021.
   - In 1-2 months; August – September 2021.
   - In 3-4 months; October – November 2021.
   - In 5-6 months; December 2021 – January 2022.

3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents; 5,778
   - Respondents with short-term travel plans/most likely to travel in the next 6 months (‘early-bird’ travellers/’travel-ready’ Europeans); 3,923
   - Respondents selecting outbound European destinations; 4,003

4. Significant changes between current and previous waves refer to >2.5% in the overall/ ‘early bird’ sample, and >5% in the countries’ sample. Some of these changes were marked using the following symbols:
   - 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. All data and insights refer to domestic and intra-European travel, unless otherwise stated.
Despite the Delta variant, travel intention remains high: 68% of Europeans plan to travel within the next 6 months.

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

- **Poland**: 79.0%
- **Spain**: 73.0%  (*8%*)
- **Austria**: 70.8%
- **Italy**: 72.5%
- **Germany**: 72.5%  (*9%*)

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

- ** Likely/Very Likely**
  - Dec ’20 - Jan ’21 survey: 26.7%
  - Feb ’21 survey: 26.6%
  - May 21’ survey: 14.6%
  - July 21’ survey: 16.7%
- **Neutral**
  - Dec ’20 - Jan ’21 survey: 54.4%
  - Feb ’21 survey: 55.6%
  - May 21’ survey: 70.3%
  - July 21’ survey: 67.9%
- **Unlikely/Very Unlikely**
  - Dec ’20 - Jan ’21 survey: 18.8%
  - Feb ’21 survey: 17.8%
  - May 21’ survey: 15.2%
  - July 21’ survey: 15.4%

* % change vs previous survey period

No. of respondents: 5,778

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?
The COVID-19 vaccine is still key to travellers’ confidence and booking behaviour, yet it no longer has a great assurance effect.

Q7. To what extent do you agree/ disagree with the following statement: "Once I’ll get vaccinated for COVID-19, I would soon book a trip".

- Likely/Very Likely: 49.8%
- Neutral: 26.3%
- Unlikely/Very Unlikely: 22.4%

Q8. To what extent do you agree/ disagree with the following statement: "Now that a vaccine for COVID-19 has been rolled out, I feel much more optimistic and confident about planning trips in the next six months".

- Agree/Strongly agree: 54.4%
- Neutral: 17.7%
- Disagree/Strongly disagree: 20.9%

* % change vs previous survey period

No. of respondents: 5,778
TREND CONTINUES: OVER 50% OF EUROPEANS COUNT ON DIGITAL COVID CERTIFICATE TO EASE TRAVEL

Two-thirds of early-bird travellers deem the EU Digital COVID Certificate very important, although among respondents with no short-term travel plans, only one-third agree/strongly agree with the certificate’s importance.

Q9. To what extent do you agree/disagree with the following statement: “The introduction of harmonised EU certificates (EU Digital COVID Certificate) to prove vaccination, COVID-19 recovery or testing status will facilitate travel/planning my next trip.”

No. of respondents: 5,778
Milder weather accelerates peoples’ desire for an extended summer travel season. 22% of ‘travel-ready’ Europeans plan to embark on a journey between September and November.

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?
Q15. To which country(ies) do you plan to travel next?

PREFERRED COUNTRIES FOR FUTURE TRIPS

Mediterranean destinations and their sunny beaches topped Europeans’ wish list for summer/autumn 2021

TOP 10 COUNTRIES

<table>
<thead>
<tr>
<th>Country</th>
<th>Respondents (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>8.9%</td>
</tr>
<tr>
<td>Spain</td>
<td>8.1% ▼29%*</td>
</tr>
<tr>
<td>France</td>
<td>8.0%</td>
</tr>
<tr>
<td>Greece</td>
<td>6.8%</td>
</tr>
<tr>
<td>Croatia</td>
<td>6.4%</td>
</tr>
<tr>
<td>Germany</td>
<td>6.0%</td>
</tr>
<tr>
<td>Portugal</td>
<td>3.8%</td>
</tr>
<tr>
<td>Belgium</td>
<td>3.6%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>3.6%</td>
</tr>
<tr>
<td>Austria</td>
<td>3.6%</td>
</tr>
</tbody>
</table>

*Please use this map as a reference only

No. of respondents: 4,003
Summer is the time to unwind, when 72% of ‘travel-ready’ Europeans plan leisure trips

Top 3 markets to take a leisure trip
- Italy: 82.4%
- Poland: 78.5%
- France: 76.9% (up 7%)

Top 3 markets to take a business trip
- Switzerland: 10.4%
- UK: 8.4%
- Netherlands: 8.2%

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For Leisure
- Dec ‘20 - Jan ‘21: 64.2%
- Feb ‘21: 65.8%
- May ‘21: 71.0%
- July ‘21: 71.7%

For Business
- Dec ‘20 - Jan ‘21: 19.6%
- Feb ‘21: 19.2%
- May ‘21: 18.8%
- July ‘21: 17.6%

To Visit Friends/Relatives
- Dec ‘20 - Jan ‘21: 4.1%
- Feb ‘21: 6.1%
- May ‘21: 4.5%
- July ‘21: 4.5%

Other
- Dec ‘20 - Jan ‘21: 10.8%
- Feb ‘21: 10.8%
- May ‘21: 10.8%
- July ‘21: 10.8%

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Q12. For what reason are you most likely to travel within Europe next?
Sea & beach holidays are the preferred holiday for 38% of ‘early-bird’ travellers

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

- **22.6%** Sun & Beach
- **13.2%** Nature & Outdoors
- **13.0%** City Break
- **4.4%** Touring & Road Trip
- **11.3%** Culture & Heritage
- **3.4%** Culinary/Food & Wine
- **15.1%** Coast & Sea
- **10.2%** Wellness & Relaxation

Europeans are going after the sun: Interest in sun & beach holidays peaked in July (25%) and remains popular through Oct-Nov (20%) and Dec ’21-Jan ’22 (21%), creating an opportunity for off-season travel to sunny destinations

* No significant changes between waves were recorded for this question

Q19. What type of leisure trip within Europe are you most likely to undertake next?
Travellers from DACH countries* are the most eager to take sun & beach trips

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 28.1% of respondents from Switzerland are most likely to undertake a sun and beach trip.

*The term “DACH countries” refers to Germany, Austria and Switzerland.
Q19. What type of leisure trip within Europe are you most likely to undertake next?

No. of respondents: 5,778

Preferences for types of trips are similar to previous waves

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 26.4% of respondents from Spain are most likely to undertake a city break trip.
GERMANY

Germans’ travel intentions are on the rise (+9%); 1 in 4 respondents are planning a trip between October-November

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec '20- Jan '21 survey</td>
<td>25.3%</td>
<td>51.3%</td>
<td>23.4%</td>
</tr>
<tr>
<td>Feb '21 survey</td>
<td>25.5%</td>
<td>56.3%</td>
<td>18.3%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>17.3%</td>
<td>66.7%</td>
<td>16.0%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>13.5%</td>
<td>72.5%</td>
<td>14.0%</td>
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</table>

% change vs previous survey period

Where will Germans travel within the next 6 months?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within my country</td>
<td>32.5%</td>
<td>32.6%</td>
<td>34.2%</td>
</tr>
<tr>
<td>To another European country</td>
<td>51.5%</td>
<td>50.9%</td>
<td>40.2%</td>
</tr>
<tr>
<td>To destinations outside Europe</td>
<td>10.8%</td>
<td>13.0%</td>
<td>17.5%</td>
</tr>
<tr>
<td>Do not yet</td>
<td>5.2%</td>
<td>6.4%</td>
<td>7.8%</td>
</tr>
</tbody>
</table>

When will Germans travel?

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
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</thead>
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<tr>
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<td>29.8%</td>
<td>35.0%</td>
<td>22.4%</td>
</tr>
<tr>
<td>Feb '21 survey</td>
<td>22.9%</td>
<td>35.6%</td>
<td>27.6%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>17.1%</td>
<td>38.1%</td>
<td>24.1%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>12.5%</td>
<td>36.0%</td>
<td>12.0%</td>
</tr>
</tbody>
</table>

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?

No. of respondents: 750 [total sample of respondents per country]
UNITED KINGDOM

Travel intentions decrease in the UK (-9%), perhaps due to the COVID-19 upsurge in UK coinciding with the survey period

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

For specific dates please refer to slide 8

Q14. Where do you plan to travel in the next 6 months?

% change vs previous survey period

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

French travel intention dropped by 14% and uncertainty regarding when to travel surged by 53%

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th>Survey</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec '20- Jan '21 survey</td>
<td>33.6%</td>
<td>51.2%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Feb '21 survey</td>
<td>33.9%</td>
<td>51.2%</td>
<td>14.9%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>14.5%</td>
<td>75.1%</td>
<td>10.4%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>22.0%</td>
<td>64.5%</td>
<td>13.5%</td>
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</tbody>
</table>

When will the French travel?

<table>
<thead>
<tr>
<th>Survey</th>
<th>In 6 months</th>
<th>In 5-6 months</th>
<th>In 3-4 months</th>
<th>In 1-2 months</th>
<th>This month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec '20- Jan '21 survey</td>
<td>33.6%</td>
<td>51.2%</td>
<td>14.5%</td>
<td>14.5%</td>
<td>22.0%</td>
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<tr>
<td>Feb '21 survey</td>
<td>33.9%</td>
<td>51.2%</td>
<td>14.9%</td>
<td>14.9%</td>
<td>22.0%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>14.5%</td>
<td>75.1%</td>
<td>10.4%</td>
<td>10.9%</td>
<td>28.2%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>22.0%</td>
<td>64.5%</td>
<td>13.5%</td>
<td>13.5%</td>
<td>28.5%</td>
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</table>

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?

FRANCE

French travel intention dropped by 14% and uncertainty regarding when to travel surged by 53%

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

Dutch travel sentiment remains positive, while uncertainty about when to travel drops by 25%, to its lowest point yet

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th>Period</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec ’20- Jan ’21 survey</td>
<td>28.9%</td>
<td>55.8%</td>
<td>11.8%</td>
</tr>
<tr>
<td>Feb ’21 survey</td>
<td>20.0%</td>
<td>24.2%</td>
<td>55.8%</td>
</tr>
<tr>
<td>May ’21 survey</td>
<td>11.8%</td>
<td>66.8%</td>
<td>21.4%</td>
</tr>
<tr>
<td>July ’21 survey</td>
<td>13.0%</td>
<td>66.2%</td>
<td>20.8%</td>
</tr>
</tbody>
</table>

When will the Dutch travel?

<table>
<thead>
<tr>
<th>Period</th>
<th>This month</th>
<th>In 1-2 months</th>
<th>In 3-4 months</th>
<th>In 5-6 months</th>
<th>I don’t know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec ’20- Jan ’21 survey</td>
<td>29.3%</td>
<td>32.8%</td>
<td>15.2%</td>
<td>7.8%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Feb ’21 survey</td>
<td>35.0%</td>
<td>32.8%</td>
<td>21.4%</td>
<td>8.8%</td>
<td>25.2%</td>
</tr>
<tr>
<td>May ’21 survey</td>
<td>32.8%</td>
<td>35.2%</td>
<td>21.4%</td>
<td>7.8%</td>
<td>19.6%</td>
</tr>
<tr>
<td>July ’21 survey</td>
<td>25.2%</td>
<td>16.6%</td>
<td>12.2%</td>
<td>4.2%</td>
<td>19.0%</td>
</tr>
</tbody>
</table>

Where will the Dutch travel within the next 6 months?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Dec ’20- Jan ’21 survey</th>
<th>Feb ’21 survey</th>
<th>May ’21 survey</th>
<th>July ’21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within my country</td>
<td>23.6%</td>
<td>25.0%</td>
<td>25.0%</td>
<td>25.0%</td>
</tr>
<tr>
<td>To another European country</td>
<td>52.7%</td>
<td>44.3%</td>
<td>42.5%</td>
<td>9%</td>
</tr>
<tr>
<td>To destinations outside Europe</td>
<td>11.1%</td>
<td>13.7%</td>
<td>15.1%</td>
<td>17.4%</td>
</tr>
<tr>
<td>Do not know yet</td>
<td>7.7%</td>
<td>8.5%</td>
<td>10.0%</td>
<td>17.4%</td>
</tr>
</tbody>
</table>

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?

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

* % change vs previous survey period
Almost a third (31%) of Italians are planning to enjoy their own country between October 2021-January 2022

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel within the next 6 months?
BELGIUM

2 in 3 Belgians will travel by January 2022, with the majority (61%) being most interested in intra-European trips

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>55.3%</td>
<td>53.1%</td>
<td>67.4%</td>
<td>66.0%</td>
</tr>
<tr>
<td>Neutral</td>
<td>28.3%</td>
<td>28.5%</td>
<td>15.2%</td>
<td>16.4%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>16.4%</td>
<td>18.4%</td>
<td>17.4%</td>
<td>17.6%</td>
</tr>
</tbody>
</table>

When will Belgians travel?

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<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>29.2%</td>
<td>29.3%</td>
<td>16.6%</td>
<td>16.8%</td>
</tr>
<tr>
<td>Neutral</td>
<td>31.8%</td>
<td>38.1%</td>
<td>34.6%</td>
<td>36.8%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>21.0%</td>
<td>19.2%</td>
<td>4.2%</td>
<td>14.4%</td>
</tr>
</tbody>
</table>

Where will Belgians travel within the next 6 months?

<table>
<thead>
<tr>
<th></th>
<th>Within my country</th>
<th>To another European country</th>
<th>To destinations outside Europe</th>
<th>Do not know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec ‘20- Jan ‘21 survey</td>
<td>22.3%</td>
<td>22.9%</td>
<td>23.6%</td>
<td>25.4%</td>
</tr>
<tr>
<td>Feb ‘21 survey</td>
<td>60.8%</td>
<td>61.8%</td>
<td>50.0%</td>
<td>61.8%</td>
</tr>
<tr>
<td>May ‘21 survey</td>
<td>52.4%</td>
<td>10.2%</td>
<td>9.8%</td>
<td>15.3%</td>
</tr>
<tr>
<td>July ‘21 survey</td>
<td>16.2%</td>
<td>16.8%</td>
<td>8.8%</td>
<td>16.2%</td>
</tr>
</tbody>
</table>

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

For specific dates please refer to slide 8

Q14. Where do you plan to travel in the next 6 months?

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

Of all surveyed markets, Swiss travellers demonstrate the strongest interest in visiting another European country

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th>Period</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec '20- Jan '21 survey</td>
<td>29.3%</td>
<td>50.6%</td>
<td>20.1%</td>
</tr>
<tr>
<td>Feb '21 survey</td>
<td>28.7%</td>
<td>47.6%</td>
<td>23.7%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>19.0%</td>
<td>61.4%</td>
<td>19.7%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>12.2%</td>
<td>65.8%</td>
<td>21.9%</td>
</tr>
</tbody>
</table>

When will the Swiss travel?

<table>
<thead>
<tr>
<th>Period</th>
<th>December '20-January '21 survey</th>
<th>February '21 survey</th>
<th>May '21 survey</th>
<th>July '21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>This month</td>
<td>30.9%</td>
<td>24.4%</td>
<td>16.8%</td>
<td>14.0%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>27.0%</td>
<td>32.0%</td>
<td>28.4%</td>
<td>25.2%</td>
</tr>
<tr>
<td>3-4 months</td>
<td>17.0%</td>
<td>29.2%</td>
<td>34.6%</td>
<td>27.0%</td>
</tr>
<tr>
<td>5-6 months</td>
<td>18.4%</td>
<td>11.3%</td>
<td>16.2%</td>
<td>17.6%</td>
</tr>
<tr>
<td>I don't know</td>
<td>6.7%</td>
<td>4.5%</td>
<td>4.5%</td>
<td>17.6%</td>
</tr>
</tbody>
</table>

For specific dates please refer to slide 8

Where will the Swiss travel within the next 6 months?

- **Within my country**
  - Dec '20-Jan '21 survey: 19.4%
  - Feb '21 survey: 26.3%
  - May '21 survey: 28.4%
  - July '21 survey: 28.4%

- **To another European country**
  - Dec '20-Jan '21 survey: 64.0%
  - Feb '21 survey: 53.3%
  - May '21 survey: 46.2%
  - July '21 survey: 46.2%

- **To destinations outside Europe**
  - Dec '20-Jan '21 survey: 12.2%
  - Feb '21 survey: 13.1%
  - May '21 survey: 13.1%
  - July '21 survey: 16.8%

- **Do not know yet**
  - Dec '20-Jan '21 survey: 6.7%
  - Feb '21 survey: 7.2%
  - May '21 survey: 8.9%
  - July '21 survey: 8.5%

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?

No. of respondents: 278 (total sample of respondents per country)

Due to the limited sample size, results should be used as indicators.

* % change vs previous survey period
Spanish travel intentions are among the highest of all respondents, with 50% of travellers planning domestic trips.

**Q11.** Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

**Q13.** When are you most likely to go on your next trip either in your country or within Europe?

**Q14.** Where do you plan to travel in the next 6 months?

<table>
<thead>
<tr>
<th>When will the Spanish travel?</th>
<th>Dec ’20- Jan ’21 survey</th>
<th>Feb ’21 survey</th>
<th>May ’21 survey</th>
<th>July ’21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>45.2%</td>
<td>39.8%</td>
<td>18.0%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Neutral</td>
<td>30.0%</td>
<td>33.2%</td>
<td>33.5%</td>
<td>34.2%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>24.2%</td>
<td>17.4%</td>
<td>21.4%</td>
<td>14.2%</td>
</tr>
</tbody>
</table>

- 8%* change vs previous survey period

<table>
<thead>
<tr>
<th>Where will the Spanish travel within the next 6 months?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within my country</td>
</tr>
<tr>
<td>Dec ’20- Jan ’21 survey: 51.8%</td>
</tr>
<tr>
<td>Feb ’21 survey: 53.8%</td>
</tr>
<tr>
<td>May ’21 survey: 79.0%</td>
</tr>
<tr>
<td>July ’21 survey: 73.0%</td>
</tr>
</tbody>
</table>

- Dec ’20- Jan ’21 survey: 45.2%
- Feb ’21 survey: 49.7%
- May ’21 survey: 48.4%
- July ’21 survey: 48.7%

- To another European country: 38.0%
- To destinations outside Europe: 30.2%
- Do not know yet: 15.1%

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

*% change vs previous survey period*
**POLAND**

Polish travellers remain the most eager to travel; one quarter are planning to take trips between October 2021 and January 2022

---

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

<table>
<thead>
<tr>
<th>Month</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec '20- Jan '21 survey</td>
<td>14.0%</td>
<td>5.8%</td>
<td>80.2%</td>
</tr>
<tr>
<td>Feb '21 survey</td>
<td>14.8%</td>
<td>6.0%</td>
<td>79.2%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>9.8%</td>
<td>8.4%</td>
<td>81.8%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>12.8%</td>
<td>8.2%</td>
<td>79.0%</td>
</tr>
</tbody>
</table>

---

**When will the Polish travel?**

For specific dates please refer to [slide 8](#).

---

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

<table>
<thead>
<tr>
<th>Destination</th>
<th>Dec '20- Jan '21 survey</th>
<th>Feb '21 survey</th>
<th>May '21 survey</th>
<th>July '21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within my country</td>
<td>36.8%</td>
<td>33.8%</td>
<td>32.3%</td>
<td>32.2%</td>
</tr>
<tr>
<td>To another European country</td>
<td>9.4%</td>
<td>8.1%</td>
<td>9.8%</td>
<td>6.0%</td>
</tr>
<tr>
<td>To destinations outside Europe</td>
<td>52.4%</td>
<td>52.9%</td>
<td>49.8%</td>
<td>52.4%</td>
</tr>
<tr>
<td>Do not know yet</td>
<td>5.1%</td>
<td>5.1%</td>
<td>6.5%</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

---

**Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?**

**Q13. When are you most likely to go on your next trip either in your country or within Europe?**

**Q14. Where do you plan to travel within the next 6 months?**

* % change vs previous survey period

No. of respondents: 500 (total sample of respondents per country)
AUSTRIA
71% of Austrians will travel in the coming 6 months, mostly to other European countries (+15%)

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel within the next 6 months?

For specific dates please refer to slide 8

No. of respondents: 500 (total sample of respondents per country)
TRIP PLANNING
Europeans travelling with their family long to spend quality time together, re-connecting, while those travelling with their partner focus on enjoying romantic leisure time and enjoying life in a relaxing environment.

The importance of ‘creating new memories’ is greater among younger respondents while ‘escaping from routine’ is more important for the 45+ age groups.

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

Q10. What is it that you miss the most about travelling and cannot wait to experience it again?

No. of respondents: 5,778
Family travel leads Europeans’ travel preferences in general, and for coast & beach holidays in particular

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

- With my family: 39.4%
- With my partner: 11.2%
- By myself: 10.2%
- With friends: 3.6%
- Other: 35.6%

No. of respondents: 3,923

Gen Z travellers (18-24 years old) are the most likely to travel with friends (24%), while baby boomers (54+ years old) are the most likely to travel with their partner (48%)

* No significant changes between waves were recorded for this question

Q18. With whom are you most likely to travel during your next trip within Europe?

Preferred travel companion vs preferred type of holiday

<table>
<thead>
<tr>
<th>Holiday Type</th>
<th>With my family</th>
<th>With my partner</th>
<th>By myself</th>
<th>With friends</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun &amp; Beach</td>
<td>46.3%</td>
<td>11.6%</td>
<td>33.2%</td>
<td>11.6%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Coast &amp; Sea</td>
<td>45.1%</td>
<td>10.4%</td>
<td>33.6%</td>
<td>10.4%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Nature &amp; Outdoors</td>
<td>40.0%</td>
<td>9.9%</td>
<td>38.4%</td>
<td>9.9%</td>
<td>0.0%</td>
</tr>
<tr>
<td>City Break Culture</td>
<td>34.7%</td>
<td>13.1%</td>
<td>34.8%</td>
<td>13.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Culture &amp; Heritage</td>
<td>35.2%</td>
<td>14.4%</td>
<td>36.0%</td>
<td>14.4%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

No. of respondents: 5,778

July '21 survey
2 in 5 Europeans will drive on their next trip; the preference for air travel drops to its lowest point so far

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

- **Spain**: 55.9%
- **France**: 55.4%
- **UK**: 51.9% (9% change vs previous survey period)
- **Italy**: 51.8%
- **Poland**: 52.2%

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

- **By Air**: 4.5% (Dec '20 - Jan '21 survey)
- **By an Owned Car**: 31.2% (Dec '20 - Jan '21 survey)
- **By Train/Bus**: 53.5% (Dec '20 - Jan '21 survey)
- **By a Rented Car**: 7.9% (Dec '20 - Jan '21 survey)

Percent changes:
- By Air: 53.5% (Dec '20 - Jan '21) to 4.5% (Feb '21)
- By an Owned Car: 31.2% (Dec '20 - Jan '21) to 31.6% (Feb '21)
- By Train/Bus: 53.5% (Dec '20 - Jan '21) to 52.3% (Feb '21)
- By a Rented Car: 7.9% (Dec '20 - Jan '21) to 9% (Feb '21)

Q16. Which of the following modes of transport would you most consider using during your next trip within Europe?

No. of respondents: 3,923
One third of ‘travel-ready’ Europeans plan 4–6–night trips (+14%), and as summer ends, stays of 12+ nights drops by 18% overall

Europeans’ planned length of stay is in line with the existing benchmark of 6.6 nights**

The most common length of stay for travellers on city break/nature & outdoors trips is 4-6 nights, while those on coast & sea/sun & beach escapes are most likely to stay for 7-9 nights

* % change vs previous survey period
** UNWTO, 2018
Half of ‘travel-ready’ Europeans will invest 500-1,500 euros on their next trip, an increase from the pre-COVID benchmark of 595 euros per trip**

Investing in the next overnight trip

<table>
<thead>
<tr>
<th>Up to 500 Euros</th>
<th>501 - 1,000 Euros</th>
<th>1,001 - 1,500 Euros</th>
<th>1,501 - 2,000 Euros</th>
<th>2,001 - 2,500 Euros</th>
<th>2,501 - 3,000 Euros</th>
<th>Over 3,000 Euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>May ’21 survey</td>
<td>July ’21 survey</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16.5%</td>
<td>16.5%</td>
<td>28.6%</td>
<td>29.2%</td>
<td>21.2%</td>
<td>20.6%</td>
<td>14.7%</td>
</tr>
<tr>
<td>14.7%</td>
<td>14.3%</td>
<td>9.0%</td>
<td>8.8%</td>
<td>5.3%</td>
<td>5.7%</td>
<td>4.8%</td>
</tr>
<tr>
<td>9.0%</td>
<td>8.8%</td>
<td>5.3%</td>
<td>5.7%</td>
<td>4.8%</td>
<td>4.8%</td>
<td></td>
</tr>
</tbody>
</table>

Spend grows with distance: The share of travellers spending over 1,000 euros is 47% in domestic tourism, 56% in cross-border tourism, and up to 64% when visiting a non-bordering European country.

** UNWTO, 2018 | Updated for 2020 prices

* No significant changes between waves were recorded for this question

Q21. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

No. of respondents: 3,923
Europeans show a consistent preference for staying in hotels on their next trip

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

<table>
<thead>
<tr>
<th>Survey</th>
<th>Hotel chain or resort</th>
<th>Independent hotel/resort</th>
<th>Friends and/or family</th>
<th>Other paid serviced accommodation (bed and breakfast, etc.)</th>
<th>Short-term rental via online platform</th>
<th>Hostel/motel</th>
<th>Camping/caravan</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>July ’21 survey</td>
<td>28.3%</td>
<td>25.2%</td>
<td>13.2%</td>
<td>12.6%</td>
<td>7.3%</td>
<td>6.7%</td>
<td>4.6%</td>
<td>2.0%</td>
</tr>
<tr>
<td>May ’21 survey</td>
<td>27.4%</td>
<td>24.0%</td>
<td>15.1%</td>
<td>13.2%</td>
<td>6.9%</td>
<td>6.3%</td>
<td>5.0%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Feb ’21 survey</td>
<td>29.1%</td>
<td>22.7%</td>
<td>14.0%</td>
<td>13.4%</td>
<td>8.0%</td>
<td>6.3%</td>
<td>4.9%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Dec ‘20- Jan ’21 survey</td>
<td>30.7%</td>
<td>24.8%</td>
<td>14.2%</td>
<td>12.1%</td>
<td>7.3%</td>
<td>4.5%</td>
<td>5.0%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

* No significant changes between waves were recorded for this question

Q17. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?
The share of ‘early-bird’ travellers who have booked all their travel components is up by 31%, while uncertainty regarding their destination choice has declined by 20%.

Q22. Please select a response which best describes the planning for your next trip:

Status of planning for the next trip

- I have not yet chosen where I will travel next
- I have chosen where I want to go but not yet booked/arranged my trip
- I have booked/arranged the transportation for my next trip
- I have booked/arranged all the travel and accommodation components for my next trip
- I have booked/arranged the accommodation for my next trip
- Jul ’21 survey
- May ’21 survey

Cautiousness about making travel decisions increases with age: 32% of Europeans over 54 have not yet chosen where they will travel next**

**This refers to the total sample

* % change vs previous survey period

No. of respondents: 3,923
TRAVEL CONCERNS
Having learned to enjoy travel despite COVID-19 limitations, the share of Europeans refraining from planning trips drops to its lowest point yet.

How has COVID-19 affected travel plans?

Top 5 markets choosing domestic over international travel

- **Italy**: 25.3% (26%*)
- **Spain**: 20.4%
- **Poland**: 17.7%
- **Germany**: 16.6%
- **Austria**: 15.9%

* % change vs previous survey period

Q2. If you were planning to take an overnight trip in the next 6 months within Europe, how has COVID-19 affected your plans?

- **Did not plan to travel**
- **Did not make any change to the original plan**
- **Had to make some change to their original plan**
- **Cancelled**

- I had not planned any overnight trips in the next 6 months
- It did not affect me at all
- I made the trip with some changes from the initial planning
- I changed my trip from international to domestic
- I changed the destination so I can use my own vehicle to travel
- I rescheduled it for another date
- I cancelled my trip completely

- **Dec ’20- Jan ’21 survey**
- **Feb ’21 survey**
- **May ’21 survey**
- **July ’21 survey**
**Q3.** Which factors will make you feel more confident to start planning a trip in the next months within Europe?

No. of respondents: 5,778

Vaccine rollout, flexible cancellation policies and fully-lifted travel restrictions are the factors enhancing Europeans’ travel confidence the most

<table>
<thead>
<tr>
<th>Top travel confidence boosters</th>
<th>No. (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting vaccinated for COVID-19</td>
<td>17.4%</td>
</tr>
<tr>
<td>Flexible cancellation policies</td>
<td>10.4%</td>
</tr>
<tr>
<td>Fully-lifted travel restrictions</td>
<td>9.1%</td>
</tr>
<tr>
<td>Destinations’ effectiveness in managing COVID-19</td>
<td>8.9%</td>
</tr>
<tr>
<td>Health &amp; safety protocols at the destination</td>
<td>8.4%</td>
</tr>
<tr>
<td>Getting an EU Digital COVID Certificate</td>
<td>8.0%</td>
</tr>
<tr>
<td>Getting pre-travel COVID-19 tests</td>
<td>19.1%</td>
</tr>
</tbody>
</table>

For travellers planning a trip between October-November, **pre-travel COVID-19 tests** are the 2nd most important factor (while ranked 8th among the total sample) and should be made highly accessible by destinations and businesses.

*No significant changes between waves were recorded for this question*
TRAVEL-READY EUROPEANS’ CONCERNS
Quarantine measures remain travellers’ greatest worry, while anxiety about rising COVID-19 cases at the destination has surged by 20%

Leading concerns for those who are most likely to travel next

17.9% Quarantine measures during my trip
14.6% Changes in travel restrictions during my trip
9.4% Limited options at the destination (closed restaurants/attractions, etc.)
15.9% Rising COVID-19 cases in the destinations I want to visit
11.7% Becoming ill during my trip
8.6% Booking and cancellation policies (refunds, etc.)

Travellers aged 54+ tend to show higher levels of concern about getting ill at the destination (30% compared to 18% among 18–24-year-olds) and regarding possible changes in travel restrictions (29% compared to 18% among travellers aged 18–24)**

*This refers to the total sample

Q4. What currently concerns you the most about travelling within Europe?
No. of respondents: 3,923

* % change vs previous survey period
Healthwise, Europeans perceive using public transportation (air or ground) to be the riskiest part of their travel journey, and they are now more concerned about attractions, tours and activities.

The most worrisome touch points during travel in relation to personal health & safety

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

* No significant changes between waves were recorded for this question

Q5. In relation to your personal health and safety, which parts of your journey will concern you the most?
Destinations’ strict health and safety protocols make people with travel plans feel safer and more relaxed

No. of respondents: 3,923

66% of travellers planning to travel by air have a favourable sentiment towards strict health and safety protocols, compared to 60% among those planning to travel by car.

Q6. Please select a response which describes you the most: “When I travel to places with strict health and safety protocols...”

- I feel much safer, knowing that my health is a top priority for the destination
- I feel more relaxed to enjoy my stay
- It does not make any difference to me
- I feel I cannot enjoy everything that a place has to offer
- I feel that strict protocols can damage the joy of travelling

* No significant changes between waves were recorded for this question.
• The report is based on an online market research of Europeans with at least 2 overnight trips in 2019.
• Distribution/data collection period:
  • Wave 5: 18 December 2020 – 7 January 2021; sample = 5,855/
  Wave 6: 5-19 February 2021; sample = 5,837/
  Wave 7: 19-29 May 2021; sample = 5,921 /
  Wave 8: 13-23 July 2021
  • 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 (9 questions) and Travel intentions, preferences and trip planning (12 questions)
• 50% of the survey’s respondents are male and 50% are female. Sample size and age groups are listed below:

<table>
<thead>
<tr>
<th>Age</th>
<th>Country</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>UK  88</td>
<td>IT  73</td>
</tr>
<tr>
<td>25 - 34</td>
<td>UK 135</td>
<td>IT 112</td>
</tr>
<tr>
<td>35 - 44</td>
<td>UK 126</td>
<td>IT 135</td>
</tr>
<tr>
<td>45 - 54</td>
<td>UK 138</td>
<td>IT 167</td>
</tr>
<tr>
<td>55+</td>
<td>UK 263</td>
<td>IT 263</td>
</tr>
<tr>
<td>Total</td>
<td>750</td>
<td>750</td>
</tr>
</tbody>
</table>
V+O GROUP

V+O Group is a leading, independent and integrated communication agency in Southeast Europe.

Our +160 professionals give modern leaders the actionable intelligence, insightful analysis, strategic counsel and practical tools they need to enable their organizations to thrive. The group has 13 companies, +210 clients and offices in Athens, Belgrade, Bucharest, Sofia, Tirana, Nicosia and Skopje, addressing a market of 62 million consumers.

In Greece, the V+O Group comprises the following four (4) companies: V+O COMMUNICATION, a holistic & multidisciplinary strategic comms & PR services agency, UNLIMITED CREATIVITY a creative powerhouse, Curious Ahead, the digital agency of the Group, and MINDHAUS, a Tourism Marketing consulting agency.

MINDHAUS

MINDHAUS is a tourism marketing agency and member of V+O Group.

We are dedicated to developing, managing, and marketing destinations, supporting & strengthening organisations, businesses, and brands, and successfully connecting them to the Visitor Economy. Our services range from consumer insights and strategy development to outsource marketing management, integrated communication campaigns, and tourism crisis communications.