MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 9 | 10/21
WAVE 9
RESEARCH HIGHLIGHTS

This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the 9th wave of market research\(^1\) initiated in September 2020. Responses are collected from Europeans in 10 high-volume source markets, in light of the COVID-19 crisis.

- Two-thirds of Europeans plan to travel during autumn and until March 2022, supporting a positive tourism outlook for the coming 6 months.
- COVID-19 vaccination retains its key role in travel: 58% of Europeans are in favour of the EU Digital COVID Certificate, 55% state that the availability of a vaccine boosts their confidence to travel, and 48% intend to plan a trip once they are vaccinated.
- When it comes to travel, Europeans steadily miss enjoying life in a relaxing environment (16%), escaping from routine (16%) and spending quality time with family or friends (14%).
- 2 in 5 Europeans will travel with their family, particularly for sun & sea holidays (45%), while city breaks remain a strong choice when travelling with a partner (34%).

\(^1\) The data collection and research methodology are detailed in the methodological annex (slide 44)
WAVE 9
RESEARCH HIGHLIGHTS

• 26% of ‘travel-ready’ Europeans intend to hit the road in October-November 2021, 28% in December 2021-January 2022, and 25% in February-March 2022, demonstrating a rather even distribution. 55% of them aim to visit another European country – the highest share since September 2020 and another indicator of the gradual return to normalcy.

• As autumn advances, ‘early-bird’ travellers’ interest drops in sun & beach travel (17%) and rises for city breaks (18%) as the most preferred type of trip.

• Half of ‘early-bird’ travellers prefer to fly to their next travel destination rather than take ground transportation — a 13% increase after three waves of a negative trend.

• As summer fades, plans for trips longer than 10 nights are decreasing, and shorter trips of 1-3 nights are surging by 63%. Shorter trips also lower travellers’ budgets: the share of ‘travel-ready’ Europeans planning to spend only up to 500 Euros has grown by 20%.

• 2 in 5 ‘early-bird’ travellers have chosen their destination but have not yet booked their trip (+23%), while the share of those who have fully booked their next trip dropped by 24%.

*‘Early-bird’/‘travel-ready’ Europeans refer to survey respondents who are most likely to travel in the next 6 months/have short term travel plans
WAVE 9 RESEARCH HIGHLIGHTS

- The share of Europeans who expect that COVID-19 will not affect their upcoming trips has reached 20% - the highest number since September 2020.

- Getting vaccinated for COVID-19, flexible cancellation policies and fully-lifted travel restrictions are the top three factors improving travellers’ confidence. The two most worrisome touchpoints during a trip are air travel (18%) and in-destination transportation (15%).

- The preference for stricter health and safety protocols at destinations endures among 63% of ‘travel-ready’ Europeans.
WAVE 9
RECOMMENDATIONS FOR DESTINATIONS

• City breaks are on the rise, therefore urban destinations should now promote shorter trips for both families and couples. To reduce visitors’ carbon footprints, cities can team up with transportation providers and offer ‘city-pass’ cards with incentives for travelling to or from the destination by bus/train.

• With the winter holiday season in-sight, destinations can start promoting COVID-safe outdoor activities, such as open-air Christmas markets, nature activities and winter sports.

• Responding to the growing interest in air travel and in visiting other European countries, destinations could expand their marketing efforts by implementing seasonal joint actions and co-branded campaigns with air carriers, especially for culture & heritage as well as city break themes.

• Although ‘travel-ready’ Europeans favour shorter booking windows, they decide where to go much earlier; destinations should therefore offer inspiring touring suggestions well in advance to fill the prospective visitor marketing funnel.
WAVE 9
RECOMMENDATIONS FOR BUSINESSES

- Reacting to the positive outlook for Q4 2021 and Q1 2022, tourism businesses can move into growth mode, expanding their inventories, staffing and marketing investment. However, planning should be done cautiously as the pandemic is still a reality and trends can reverse unexpectedly.

- As interest in urban vacations peaks, hotels in urban destinations should now promote city break packages.

- Business travel is well below its pre-pandemic share of 11%*; urban business hotels should also partially focus on leisure city travellers for the coming months.

- Despite the upcoming winter, sun & beach trips maintain their popularity. Businesses in seaside areas should focus on families and highlight opportunities to enjoy life in a relaxing environment and escape from routine (19% and 17% respectively of sun & beach travellers).

- Half of ‘travel-ready’ Europeans will book their trip within one month of departure; businesses should promote last-minute deals as well as incentives for early bookings with flexible cancellation policies.

- As health & safety concerns regarding attractions, tours and activities persist, businesses should continue to adhere to strict health & safety protocols and communicate their efforts on their websites, social media channels, leading travel apps and in response to customers’ reviews.

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Wave 9

1. Dates on the graphs refer to the following data collection periods for each research wave:

<table>
<thead>
<tr>
<th></th>
<th>Wave 6</th>
<th>Wave 7</th>
<th>Wave 8</th>
<th>Wave 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surveys dates</td>
<td>5-19 Feb '21</td>
<td>19-29 May '21</td>
<td>13-23 July '21</td>
<td>10-18 Sep '21</td>
</tr>
</tbody>
</table>

2. To present Wave 9 timings in which respondents are most likely to take their next trip, the following time periods should be used as a reference:

- This month; September 2021
- In 1-2 months; October – November 2021
- In 3-4 months; December 2021 – January 2022
- In 5-6 months; February – March 2022

3. To present data and insights, the following distinct groups have been analysed:

- Total respondents; 5,769
- Respondents with short-term travel plans/most likely to travel in the next 6 months (‘early-bird’ travellers/’travel-ready’ Europeans); 3,822
  - Respondents selecting outbound European destinations; 4,149

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

5. All data and insights refer to domestic and intra-European travel, unless otherwise stated.
TRAVEL INTENTIONS
2 in 3 Europeans plan to travel in the coming 6 months, which supports the positive outlook for Q4 2021 and Q1 2022

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

- **Poland**: 73.0% (8%*)
- **Netherlands**: 68.2%
- **Spain**: 72.0%
- **Germany**: 67.5% (7%*)
- **Italy**: 68.3%

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

* % change vs previous survey period

No. of respondents: 5,769
The COVID-19 vaccine enhances the confidence to plan trips for over half of Europeans

**Europeans’ likelihood to book a trip once vaccinated**

<table>
<thead>
<tr>
<th></th>
<th>May ’21 survey</th>
<th>July ’21 survey</th>
<th>Sep ’21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>19.5%</td>
<td>22.4%</td>
<td>21.5%</td>
</tr>
<tr>
<td>Neutral</td>
<td>54.2%</td>
<td>49.8%</td>
<td>48.0%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>26.3%</td>
<td>27.9%</td>
<td>30.8%</td>
</tr>
</tbody>
</table>

**COVID-19 vaccine rollout supports travellers’ confidence**

<table>
<thead>
<tr>
<th></th>
<th>May ’21 survey</th>
<th>July ’21 survey</th>
<th>Sep ’21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree/Strongly agree</td>
<td>17.7%</td>
<td>24.8%</td>
<td>20.7%</td>
</tr>
<tr>
<td>Neutral</td>
<td>57.4%</td>
<td>54.4%</td>
<td>54.8%</td>
</tr>
<tr>
<td>Disagree/Strongly disagree</td>
<td>24.8%</td>
<td>24.7%</td>
<td>24.4%</td>
</tr>
</tbody>
</table>

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”.

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”.

* % change vs previous survey period

No. of respondents: 5,769
THE EU DIGITAL COVID CERTIFICATE REMAINS AN IMPORTANT FACTOR IN FACILITATING TRAVEL ACCORDING TO 58% OF EUROPEANS

The importance of the EU Digital COVID Certificate correlates positively with respondents’ attitudes towards strict health and safety protocols: 69% of those who strongly agree/agree with the COVID Certificate’s utility feel much safer with such measures vs. only 11% of those who strongly disagree/disagree.

*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: 5,769
Interest in intra-European travel is at an all-time-high, and holiday plans for ‘travel-ready’ Europeans’ are equally distributed from October 2021 through March 2022

When will Europeans travel next?

<table>
<thead>
<tr>
<th>Month</th>
<th>This month</th>
<th>In 1-2 months</th>
<th>In 3-4 months</th>
<th>Do not know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb '21 survey</td>
<td>10,9%</td>
<td>46,0%</td>
<td>29,0%</td>
<td>2,6%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>16,3%</td>
<td>40,6%</td>
<td>31,0%</td>
<td>4,4%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>14,5%</td>
<td>22,0%</td>
<td>40,2%</td>
<td>15,5%</td>
</tr>
<tr>
<td>Sep '21 survey</td>
<td>10,8%</td>
<td>25,3%</td>
<td>25,7%</td>
<td>10,6%</td>
</tr>
</tbody>
</table>

Where will Europeans travel within the next 6 months?

<table>
<thead>
<tr>
<th>Month</th>
<th>Within my country</th>
<th>To destinations outside Europe</th>
<th>Do not know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb '21 survey</td>
<td>2,8%</td>
<td>25,2%</td>
<td>35,8%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>2,5%</td>
<td>27,6%</td>
<td>36,1%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>2,4%</td>
<td>24,4%</td>
<td>35,1%</td>
</tr>
<tr>
<td>Sep '21 survey</td>
<td>2,8%</td>
<td>25,3%</td>
<td>31,5%</td>
</tr>
</tbody>
</table>

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?

* % change vs previous survey period
No. of respondents: 3,822
PREFERRED COUNTRIES FOR EUROPEANS’ NEXT TRIP

Seasons change, but Europeans’ preference for Mediterranean destinations endures

TOP 10 COUNTRIES

Spain 9.2%
Italy 9.1%
France 8.2%
Greece 6.8%
Germany 6.2%
Croatia 5.4%
Portugal 4.2%
Turkey 3.9%
Austria 3.8%
United Kingdom 3.5%

*Please use this map as a reference only

No. of respondents: 4,149

Q15. To which country[ies] do you plan to travel next?

* No significant changes between waves were recorded for this question
Leisure is undisputedly the primary reason for travel, while the limited share of business trips remains.

Top 3 markets to take a leisure trip:
- Italy: 80.5%
- Netherlands: 77.4%
- France: 74.4%

Top 3 markets to take a business trip:
- Italy: 19.2%
- Switzerland: 18.8%
- Netherlands: 17.6%

Purpose of travel for respondents most likely to travel in the next 6 months:
- Feb '21 survey: 65.8% For Leisure, 71.0% For Business, 71.7% To Visit Friends/Relatives, 71.0% Other
- May '21 survey: 4.1% For Leisure, 4.5% For Business, 6.2% To Visit Friends/Relatives, 6.5% Other
- July '21 survey: 4.5% For Leisure, 4.5% For Business, 6.2% To Visit Friends/Relatives, 6.5% Other
- Sep '21 survey: 3.9% For Leisure, 4.1% For Business, 6.1% To Visit Friends/Relatives, 6.5% Other

Q12. For what reason are you most likely to travel within Europe next? Results for business trip per country are indicative due to small sample bases.

* No significant changes between waves were recorded for this question.
No. of respondents: 3,822
As autumn arrives, sun & beach travel intentions drop (-31%) and city breaks (+43%) receive increased attention.

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

- **18.0%** City Break
- **12.2%** Nature & Outdoors
- **12.9%** Coast & Sea
- **4.3%** Touring & Road Trip
- **12.5%** Culture & Heritage
- **3.7%** Culinary/Food & Wine
- **17.3%** Sun & Beach
- **11.4%** Wellness & Relaxation

* % change vs previous survey period

1 in 4 ‘travel-ready’ Europeans planning a city break will use a train/bus on their next trip, more than any other traveller.

Sep ’21 survey

Q19. What type of leisure trip within Europe are you most likely to undertake next?
# Q19. What type of leisure trip within Europe are you most likely to undertake next?

Dutch and British travellers are the most eager to catch the last rays of sun before winter.

<table>
<thead>
<tr>
<th>Sun &amp; Beach</th>
<th>Coast &amp; Sea</th>
<th>Cruising</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Netherlands</strong></td>
<td><strong>Germany</strong></td>
<td><strong>UK</strong></td>
</tr>
<tr>
<td>27.8%</td>
<td>17.6%</td>
<td>5.6%</td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td><strong>Poland</strong></td>
<td><strong>Italy</strong></td>
</tr>
<tr>
<td>25.9%</td>
<td>17.0%</td>
<td>3.9%</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td><strong>Switzerland</strong></td>
<td><strong>France</strong></td>
</tr>
<tr>
<td>22.8%</td>
<td>16.3%</td>
<td>2.5%</td>
</tr>
<tr>
<td><strong>Belgium</strong></td>
<td><strong>France</strong></td>
<td><strong>Germany</strong></td>
</tr>
<tr>
<td>22.6%</td>
<td>14.5%</td>
<td>2.3%</td>
</tr>
<tr>
<td><strong>France</strong></td>
<td><strong>Austria</strong></td>
<td><strong>Spain</strong></td>
</tr>
<tr>
<td>20.7%</td>
<td>12.8%</td>
<td>2.0%</td>
</tr>
</tbody>
</table>

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 27.8% of respondents from Netherlands are most likely to undertake a sun and beach trip. 

No. of respondents: 5,769
Spanish travellers’ passion for city life and Italians’ interest in culture & heritage surge

Sep ’21 survey

City Break
- Spain: 37.8% (43%*)
- Poland: 22.8% (50%*)
- Netherlands: 21.2% (34%*)
- UK: 19.5%
- Austria: 15.2%

Nature & Outdoors
- Germany: 17.9%
- Austria: 17.2%
- Belgium: 14.4%
- Netherlands: 14.0% (31%*)
- Switzerland: 13.7%

Culture & Heritage
- Italy: 28.4% (29%*)
- France: 17.3%
- Spain: 13.6%
- Poland: 13.4%
- Belgium: 9.2%

* % change vs previous survey period

Q19. What type of leisure trip within Europe are you most likely to undertake next?

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 37.8% of respondents from Spain are most likely to undertake a city break trip.
GERMANY

Two-thirds of Germans plan to travel in the coming 6 months, a slight 7% decline from the peak travel interest during the summer

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th></th>
<th>Feb '21 survey</th>
<th>May '21 survey</th>
<th>July '21 survey</th>
<th>Sep '21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>25.5%</td>
<td>18.3%</td>
<td>13.5%</td>
<td>17.9%</td>
</tr>
<tr>
<td>Neutral</td>
<td>17.3%</td>
<td>16.0%</td>
<td>14.0%</td>
<td>14.7%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>56.3%</td>
<td>66.7%</td>
<td>72.5%</td>
<td>67.5%</td>
</tr>
</tbody>
</table>

↓ 7%*

When will Germans travel?

- **Feb '21 survey**
  - This month: 22.9%
  - In 1-2 months: 35.6%
  - In 3-4 months: 18.3%
  - In 5-6 months: 17.1%
  - I don’t know yet: 12.5%

- **May '21 survey**
  - This month: 17.1%
  - In 1-2 months: 27.6%
  - In 3-4 months: 24.1%
  - In 5-6 months: 25.7%
  - I don’t know yet: 19.9%

- **July '21 survey**
  - This month: 12.0%
  - In 1-2 months: 25.7%
  - In 3-4 months: 36.0%
  - In 5-6 months: 13.7%
  - I don’t know yet: 17.9%

- **Sep '21 survey**
  - This month: 10.5%
  - In 1-2 months: 22.9%
  - In 3-4 months: 25.7%
  - In 5-6 months: 19.9%
  - I don’t know yet: 20.9%

Where will Germans travel within the next 6 months?

- **Within my country**
  - Feb '21 survey: 35.1%
  - May '21 survey: 29.7%
  - July '21 survey: 32.8%
  - Sep '21 survey: 67% (7% increase)

- **To another European country**
  - Feb '21 survey: 17.5%
  - May '21 survey: 20.8%
  - July '21 survey: 13.0%
  - Sep '21 survey: 42.1% (7% increase)

- **To destinations outside Europe**
  - Feb '21 survey: 35.3%
  - May '21 survey: 51.5%
  - July '21 survey: 47.6%
  - Sep '21 survey: 50.9% (7% increase)

- **Do not know yet**
  - Feb '21 survey: 15.7%
  - May '21 survey: 6.6%
  - July '21 survey: 10.5%
  - Sep '21 survey: 8.3% (7% increase)

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?

* % change vs previous survey period

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

Despite a 9% increase in travel plans, the British demonstrate lower willingness to travel compared to other markets

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th>Survey Period</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb '21</td>
<td>41.5%</td>
<td>57.7%</td>
<td>5.2%</td>
</tr>
<tr>
<td>May '21</td>
<td>20.7%</td>
<td>57.7%</td>
<td>22.5%</td>
</tr>
<tr>
<td>July '21</td>
<td>24.8%</td>
<td>52.4%</td>
<td>27.2%</td>
</tr>
<tr>
<td>Sep '21</td>
<td>27.2%</td>
<td>44.4%</td>
<td>24.8%</td>
</tr>
</tbody>
</table>

When will the British 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>Feb '21 survey</td>
<td>5.2%</td>
<td>7.1%</td>
<td>9.9%</td>
<td>18.8%</td>
<td>27.6%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>9.9%</td>
<td>17.1%</td>
<td>19.5%</td>
<td>25.9%</td>
<td>29.1%</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>17.2%</td>
<td>21.9%</td>
<td>22.3%</td>
<td>27.6%</td>
<td>31.7%</td>
</tr>
<tr>
<td>Sep '21 survey</td>
<td>19.7%</td>
<td>26.3%</td>
<td>26.9%</td>
<td>31.7%</td>
<td>34.4%</td>
</tr>
</tbody>
</table>

Where will the British travel within the next 6 months?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Feb '21</th>
<th>May '21</th>
<th>July '21</th>
<th>Sep '21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within my country</td>
<td>34.3%</td>
<td>37.3%</td>
<td>38.8%</td>
<td>36.8%</td>
</tr>
<tr>
<td>To another European country</td>
<td>41.7%</td>
<td>38.2%</td>
<td>40.1%</td>
<td>34.3%</td>
</tr>
<tr>
<td>To destinations outside Europe</td>
<td>12.2%</td>
<td>13.5%</td>
<td>11.0%</td>
<td>13.3%</td>
</tr>
<tr>
<td>Do not know yet</td>
<td>11.8%</td>
<td>11.5%</td>
<td>9.1%</td>
<td>17.6%</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)

* % change vs previous survey period
French travellers are willing to travel, but uncertainty regarding the timing of their next trip surges by 31%, to the highest level among all countries surveyed.

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?
THE NETHERLANDS
Despite their willingness to travel, especially to other European countries, Dutch uncertainty regarding trip timing rises by 32%

Willingness to travel in the next 6 months

<table>
<thead>
<tr>
<th></th>
<th>Feb '21 survey</th>
<th>May '21 survey</th>
<th>July '21 survey</th>
<th>Sep '21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely/Very Likely</td>
<td>20,0%</td>
<td>11,8%</td>
<td>13,0%</td>
<td>13,8%</td>
</tr>
<tr>
<td>Neutral</td>
<td>24,2%</td>
<td>21,4%</td>
<td>20,8%</td>
<td>18,0%</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
<td>55,8%</td>
<td>66,8%</td>
<td>66,2%</td>
<td>68,2%</td>
</tr>
</tbody>
</table>

When will the Dutch travel?

<table>
<thead>
<tr>
<th></th>
<th>Feb '21 survey</th>
<th>May '21 survey</th>
<th>July '21 survey</th>
<th>Sep '21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>This month</td>
<td>8,8%</td>
<td>4,2%</td>
<td>19,6%</td>
<td>8,4%</td>
</tr>
<tr>
<td>In 1-2 months</td>
<td>21,4%</td>
<td>18,8%</td>
<td>28,4%</td>
<td>19,4%</td>
</tr>
<tr>
<td>In 3-4 months</td>
<td>35,0%</td>
<td>35,2%</td>
<td>25,2%</td>
<td>32%</td>
</tr>
<tr>
<td>In 5-6 months</td>
<td>16,6%</td>
<td>12,2%</td>
<td>21,4%</td>
<td>25,0%</td>
</tr>
<tr>
<td>I don’t know yet</td>
<td>32%*</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Where will the Dutch 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>Feb '21 survey</td>
<td>18,9%</td>
<td>23,6%</td>
<td>28,0%</td>
<td>56,4%</td>
</tr>
<tr>
<td>May '21 survey</td>
<td>11,1%</td>
<td>57,6%</td>
<td>46,3%</td>
<td>-</td>
</tr>
<tr>
<td>July '21 survey</td>
<td>11,6%</td>
<td>13,9%</td>
<td>15,6%</td>
<td>-</td>
</tr>
<tr>
<td>Sep '21 survey</td>
<td>7,7%</td>
<td>8,5%</td>
<td>10,0%</td>
<td>-</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?

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

* % change vs previous survey period

For specific dates please refer to slide 8.
ITALY

Italians demonstrate a particularly high interest in travelling around the Christmas/New Year period, and a slight decline (-13%) in their strong preference for domestic travel.

Willingness to travel in the next 6 months

- Feb '21 survey: 63.7% Likely/Very Likely, 18.0% Neutral, 18.3% Unlikely/Very Unlikely
- May '21 survey: 74.8% Likely/Very Likely, 15.6% Neutral, 9.6% Unlikely/Very Unlikely
- July '21 survey: 72.5% Likely/Very Likely, 14.7% Neutral, 12.8% Unlikely/Very Unlikely
- Sep '21 survey: 68.3% Likely/Very Likely, 19.5% Neutral, 12.3% Unlikely/Very Unlikely

When will Italians travel?

- Feb '21 survey: 27.3% This month, 18.0% In 1-2 months, 12.4% In 3-4 months, 7.7% In 5-6 months, 2.1% I don’t know yet
- May '21 survey: 43.2% This month, 14.9% In 1-2 months, 19.1% In 3-4 months, 18.0% In 5-6 months, 2.4% I don’t know yet
- July '21 survey: 35.7% This month, 14.9% In 1-2 months, 16.8% In 3-4 months, 19.1% In 5-6 months, 2.5% I don’t know yet
- Sep '21 survey: 26.1% This month, 13.9% In 1-2 months, 24.0% In 3-4 months, 19.1% In 5-6 months, 2.4% I don’t know yet

Where will Italians travel within the next 6 months?

- Within my country: 53.0% Feb '21 survey, 52.7% May '21 survey, 53.0% July '21 survey, 52.7% Sep '21 survey
- To another European country: 39.0% Feb '21 survey, 33.8% May '21 survey, 34.8% July '21 survey, 33.8% Sep '21 survey
- To destinations outside Europe: 5.0% Feb '21 survey, 5.0% May '21 survey, 5.0% July '21 survey, 5.0% Sep '21 survey
- Do not know yet: 13.0% Feb '21 survey, 13.0% May '21 survey, 13.0% July '21 survey, 13.0% Sep '21 survey

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)
BELGIUM

Almost two-thirds of Belgians plan to visit another European country, showing the highest sentiment for intra-European trips among all surveyed markets.

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
SWITZERLAND

Swiss travel sentiment cools down, with a 69% surge in those unlikely/very unlikely to travel and a 47% increase in uncertainty regarding trip timing

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?

For specific dates please refer to slide 8

* % change vs previous survey period
SPAIN

Spanish respondents maintain a strong willingness to travel, with a change in preferences from domestic (-19%) to intra-European (+26%) travel

<table>
<thead>
<tr>
<th>Willingness to travel in the next 6 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb '21 survey</td>
</tr>
<tr>
<td>Likely/Very Likely</td>
</tr>
<tr>
<td>Neutral</td>
</tr>
<tr>
<td>Unlikely/Very Unlikely</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>When will the Spanish travel?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb '21 survey</td>
</tr>
<tr>
<td>This month</td>
</tr>
<tr>
<td>In 1-2 months</td>
</tr>
<tr>
<td>In 3-4 months</td>
</tr>
<tr>
<td>In 5-6 months</td>
</tr>
<tr>
<td>I don’t know yet</td>
</tr>
</tbody>
</table>

<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>To another European country</td>
</tr>
<tr>
<td>To destinations outside Europe</td>
</tr>
<tr>
<td>Do not know yet</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?

* % change vs previous survey period

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

While Polish travellers remain the most eager to travel, both domestically and to other European countries, their level of uncertainty regarding trip timing rises by 58%.

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?

For specific dates please refer to slide 8

* % change vs previous survey period

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

Austrians’ uncertainty regarding trip timing rises by 79%, and the preference for intra-European trips loses ground by 11%, perhaps due to the rise in COVID-19 cases in the country during 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?

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

No. of respondents: 500 (total sample of respondents per country)
What do Europeans miss the most about travelling?

While seasons and preferences for different types of trips change, Europeans remain unanimous about the added value of travelling.

16.4%  Enjoying life in a relaxing environment
16.2%  Escaping from routine
14.0%  Spending quality time with family or friends
12.5%  Creating lasting new memories
9.9%  Living the local life and immersion in the local culture

Sep '21 survey

* 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: 5,769
Two in five Europeans will travel with their family, while travelling with a partner drops by 7%.

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

- 39.1% With my family
- 33.0% With my partner
- 12.3% By myself
- 7%* With friends
- 11.8% Other

No. of respondents: 3,822

**Preferred travel companion vs preferred type of holiday**

- City Break: 36.2% With my family, 44.1% With my partner, 46.3% By myself, 41.3% With friends, 44.1% Other
- Sun & Beach: 33.9% With my family, 29.9% With my partner, 30.6% By myself, 32.3% With friends, 31.5% Other
- Coast & Sea: 11.3% With my family, 10.0% With my partner, 10.3% By myself, 11.1% With friends, 9.8% Other
- Culture & Heritage: 11.1% With my family, 11.1% With my partner, 11.1% By myself, 11.1% With friends, 9.8% Other
- Nature & Outdoors: 12.3% With my family, 12.3% With my partner, 12.3% By myself, 12.3% With friends, 9.8% Other

No. of respondents: 5,769

* % change vs previous survey period
Following three waves of a negative trend, the preference for air travel finally takes off (+13%), mainly to the detriment of using one’s car.

Top 5 markets that are most likely to travel by plane in the next 6 months:
- **Spain**: 65.8% (18%*)
- **France**: 57.4%
- **Italy**: 62.5% (21%*)
- **Netherlands**: 52.8% (28%*)
- **UK**: 58.4% (13%*)

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

- **By Air**
  - Feb ’21 survey: 4.1% (8.5%)
  - May ’21 survey: 3.4% (8.0%)
  - July ’21 survey: 2.8% (8.5%)
  - Sep ’21 survey: 2.8% (8.9%)
- **By an Owned Car**
  - Feb ’21 survey: 31.6%
  - May ’21 survey: 39.0%
  - July ’21 survey: 39.7%
  - Sep ’21 survey: 33.9%
- **By Train/Bus**
  - Feb ’21 survey: 52.3%
  - May ’21 survey: 46.7%
  - July ’21 survey: 45.7%
  - Sep ’21 survey: 51.5%
- **By a Rented Car**

* % change vs previous survey period

No. of respondents: 3,822
The preference for shorter trips surges by 63%, while 4- to 6-night trips remain the preferred length of stay for one third of the Europeans who intend to travel in the coming months.

Length of next overnight trip

- Up to 3 nights: May ’21 survey: 10.5%, July ’21 survey: 11.3%, Sep ’21 survey: 18.4%
- 4-6 nights: May ’21 survey: 30.2%, July ’21 survey: 34.3%, Sep ’21 survey: 35.7%
- 7-9 nights: May ’21 survey: 28.6%, July ’21 survey: 27.6%, Sep ’21 survey: 26.4%
- 10-12 nights: May ’21 survey: 15.0%, July ’21 survey: 14.0%, Sep ’21 survey: 10.7%
- Over 12 nights: May ’21 survey: 15.7%, July ’21 survey: 12.8%, Sep ’21 survey: 8.8%

* % change vs previous survey period

Much of the rise in shorter trips could be attributed to the greater demand for city breaks, which accounts for 28% of all trips of up to 3 nights.
As Europeans’ intentions for shorter trips rises, the share of those planning to spend up to 500 Euros grows by 20%

Investing in the next overnight trip

<table>
<thead>
<tr>
<th>Range</th>
<th>May ’21 survey</th>
<th>July ’21 survey</th>
<th>Sep ’21 survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 500 Euros</td>
<td>16.5%</td>
<td>16.5%</td>
<td>19.8%</td>
</tr>
<tr>
<td>501 - 1,000 Euros</td>
<td>28.6%</td>
<td>29.2%</td>
<td>28.6%</td>
</tr>
<tr>
<td>1,001 - 1,500 Euros</td>
<td>21.2%</td>
<td>20.6%</td>
<td>21.2%</td>
</tr>
<tr>
<td>1,501 - 2,000 Euros</td>
<td>14.7%</td>
<td>14.3%</td>
<td>18.9%</td>
</tr>
<tr>
<td>2,001 - 2,500 Euros</td>
<td>9.0%</td>
<td>8.8%</td>
<td>9.0%</td>
</tr>
<tr>
<td>2,501 - 3,000 Euros</td>
<td>5.3%</td>
<td>5.7%</td>
<td>5.3%</td>
</tr>
<tr>
<td>Over 3,000 Euros</td>
<td>4.8%</td>
<td>4.8%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

22% of all up-to-500 Euros trips are city breaks, and over half (62%) of city break travellers will spend up to 1,000 Euros

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

No. of respondents: 3,822
### Preference for staying in a hotel chain/resort (+13%) rises to its highest level since September 2020

<table>
<thead>
<tr>
<th>Survey</th>
<th>Hotel chain or resort</th>
<th>Independent hotel/resort</th>
<th>Friends and/or family</th>
<th>Short-term rental via online platform</th>
<th>Other paid serviced accommodation (bed and breakfast, etc.)</th>
<th>Camping/caravan</th>
<th>Hostel/motel</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep ’21 survey</td>
<td>32.1%</td>
<td>25.2%</td>
<td>14.2%</td>
<td>13.0%</td>
<td>5.9%</td>
<td>4.2%</td>
<td>6.6%</td>
<td>1.8%</td>
</tr>
<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>4.6%</td>
<td>6.7%</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>5.0%</td>
<td>6.3%</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>4.9%</td>
<td>6.3%</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

* % change vs previous survey period

No. of respondents: 3,822

Q17. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?
2 out of 5 ‘early-bird’ travellers have chosen their destination but have not yet booked (+23%), while the share of those who have fully booked drops by 24%
TRAVEL CONCERNS
The share of Europeans who expect to travel without being affected by COVID-19 (+39%) has increased to its highest level since September 2020

How has COVID-19 affected travel plans?

- **Did not plan to travel**
  - Feb '21 survey: 19.3%
  - May '21 survey: 16.1%
  - July '21 survey: 14.7%
  - Sep '21 survey: 15.1%
- **Did not make any change to the original plan**
  - Feb '21 survey: 8.8%
  - May '21 survey: 12.1%
  - July '21 survey: 14.5%
  - Sep '21 survey: 20.1%
  - Change: 39%* increase
- **Had to make some change to their original plan**
  - Feb '21 survey: 10.5%
  - May '21 survey: 11.9%
  - July '21 survey: 13.3%
  - Sep '21 survey: 15.2%
- **Cancelled**
  - Feb '21 survey: 11.4%
  - May '21 survey: 14.2%
  - July '21 survey: 16.2%
  - Sep '21 survey: 15.5%
  - Change: 24%* decrease

Top 5 markets choosing domestic over international travel:

- **Italy**: 21.2%
- **Spain**: 20.6%
- **Austria**: 16.2%
- **Poland**: 15.6%
- **UK**: 14.0%

* % change vs previous survey period

No. of respondents: 5,769

Q2. If you were planning to take an overnight trip in the next 6 months within Europe, how has COVID-19 affected your plans?
The top 5 factors boosting Europeans’ travel confidence remain unchanged, with vaccine rollout being no.1, followed by flexible cancellation policies.

- **Getting vaccinated for COVID-19**: 15.4%
- **Flexible cancellation policies**: 12.2%
- **Fully-lifted travel restrictions**: 9.9%
- **Destinations’ effectiveness in managing COVID-19**: 8.9%
- **Health & safety protocols at the destination**: 8.3%
- **Bargains and attractive deals**: 8.0%

The importance of destinations’ effectiveness in managing COVID-19 is double (16%) among Europeans over 54 years old, compared to the 18-24 age group (8%).

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

Q3. Which factors will make you feel more confident to start planning a trip in the next months within Europe? 

No. of respondents: 5,769
TRAVEL-READY EUROPEANS’ CONCERNS

Going into quarantine tops respondents’ list of concerns, followed by changes in travel restrictions and rising COVID-19 cases at the destination

Leading concerns for those who are most likely to travel next

18.6%  
Quarantine measures during my trip

13.9%  
Rising COVID-19 cases in the destinations I want to visit

10.0%  
Booking and cancellation policies (refunds, etc.)

14.2%  
Changes in travel restrictions during my trip

12.6%  
Becoming ill during my trip

9.6%  
Limited options at the destination (closed restaurants/attractions, etc.)

Gen Z travellers (aged 18-24) tend to be slightly more concerned about limited options at the destination (closed restaurants/attractions), booking and cancellation policies, and organising all travel documents before the trip, compared to the overall sample**

**This refers to the total sample

Q4. What currently concerns you the most about travelling within Europe?
No. of respondents: 3,822

* No significant changes between waves were recorded for this question
Air travel and in-destination transportation top Europeans’ concerns regarding personal health and safety during trips

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

- Sep ’21 survey: Air travel 18.3%, In destination transport (metro, bus, taxi) 15.2%, Attractions, tours and activities (i.e., museums, theme parks) 12.2%, Food & beverage 11.8%, Public areas in destinations (i.e., streets, neighborhoods) 11.4%, Accommodation – hotels and resorts 11.1%
- July ’21 survey: Air travel 17.3%, In destination transport (metro, bus, taxi) 14.6%, Attractions, tours and activities (i.e., museums, theme parks) 12.7%, Food & beverage 13.0%, Public areas in destinations (i.e., streets, neighborhoods) 11.8%, Accommodation – hotels and resorts 11.3%
- May ’21 survey: Air travel 18.0%, In destination transport (metro, bus, taxi) 15.3%, Attractions, tours and activities (i.e., museums, theme parks) 11.8%, Food & beverage 13.1%, Public areas in destinations (i.e., streets, neighborhoods) 11.3%, Accommodation – hotels and resorts 10.7%
- Feb ’21 survey: Air travel 16.8%, In destination transport (metro, bus, taxi) 12.7%, Attractions, tours and activities (i.e., museums, theme parks) 10.8%, Food & beverage 13.2%, Public areas in destinations (i.e., streets, neighborhoods) 11.0%, Accommodation – hotels and resorts 11.1%

* 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?
The preference of 63% of ‘travel-ready’ Europeans for strict health and safety protocols remains strong, despite the massive roll out of COVID-19 vaccines.

Sentiment towards strict health & safety protocols

- I feel much safer, knowing that my health is a top priority for the destination: 37.6% Feb ’21 survey, 36.7% May ’21 survey, 35.9% July ’21 survey, 34.8% Sep ’21 survey
- I feel more relaxed to enjoy my stay: 29.7% Feb ’21 survey, 27.7% May ’21 survey, 28.9% July ’21 survey, 28.0% Sep ’21 survey
- It does not make any difference to me: 10.1% Feb ’21 survey, 10.8% May ’21 survey, 11.8% July ’21 survey, 12.8% Sep ’21 survey
- I feel I cannot enjoy everything that a place has to offer: 13.4% Feb ’21 survey, 15.2% May ’21 survey, 13.9% July ’21 survey, 14.3% Sep ’21 survey
- I feel that strict protocols can damage the joy of travelling: 9.1% Feb ’21 survey, 9.6% May ’21 survey, 9.5% July ’21 survey, 10.0% Sep ’21 survey

A preference for strict health & safety protocols is highest among Europeans planning to go on a cruise (71%) or take a culture & heritage trip (70%).

*No significant changes between waves were recorded for this question.
**This refers to the total sample.
No. of respondents: 3,822.
METHODOLOGICAL ANNEX

THE SURVEY

- The report is based on an online market research of Europeans with at least 2 overnight trips during the last three years (2019-2021)
- Distribution / data collection period:
  - 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)
- 45% of the survey’s respondents are male and 55% are female. Sample size and age groups are listed below:

<table>
<thead>
<tr>
<th>Age</th>
<th>UK</th>
<th>IT</th>
<th>ES</th>
<th>AT</th>
<th>FR</th>
<th>DE</th>
<th>PL</th>
<th>BE</th>
<th>CH</th>
<th>NL</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
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<td>73</td>
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<td>95</td>
<td>96</td>
<td>92</td>
<td>56</td>
<td>179</td>
<td>123</td>
<td>190</td>
<td>1,037</td>
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<tr>
<td>25-34</td>
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<td>126</td>
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<td>106</td>
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<td>35-44</td>
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<tr>
<td>45-54</td>
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<td>167</td>
<td>105</td>
<td>83</td>
<td>146</td>
<td>168</td>
<td>93</td>
<td>76</td>
<td>43</td>
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<td>1,057</td>
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<td>263</td>
<td>263</td>
<td>175</td>
<td>79</td>
<td>163</td>
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<td>675</td>
<td>750</td>
<td>500</td>
<td>500</td>
<td>344</td>
<td>500</td>
<td>5,769</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.
Study on Monitoring Sentiment for Intra-European Travel

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