



MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

09/20 | WAVE 1

Co-funded by
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EUROPEAN
TRAVEL
COMMISSION

WAVE 1

RESEARCH HIGHLIGHTS



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

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

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RESEARCH HIGHLIGHTS

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



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RESEARCH HIGHLIGHTS



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

WAVE 1

RESEARCH HIGHLIGHTS

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



WAVE 1

RECOMMENDATIONS FOR DESTINATIONS



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

WAVE 1

RECOMMENDATIONS FOR BUSINESSES



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



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How to read

1. To present insights, findings and statistics, the following distinct groups have been analysed depending on the topic and should be used as a reference:
 - Total respondents; 5,762
 - Respondents with short-term travel plans/ most likely to travel in the next 6 months; 3,086
 - Respondents selecting outbound European destinations; 3,915
2. To present the timing in which respondents are most likely to take their next trip, the following time periods should be used as a reference:
 - This month; August – September 2020.
 - In 1-2 months; during September – November 2020.
 - In 3-4 months; during November 2020 – January 2021.
 - In 5-6 months; during January - March 2021.
3. All data, statistics, findings and insights refer to domestic and intra-European travel, unless otherwise stated.

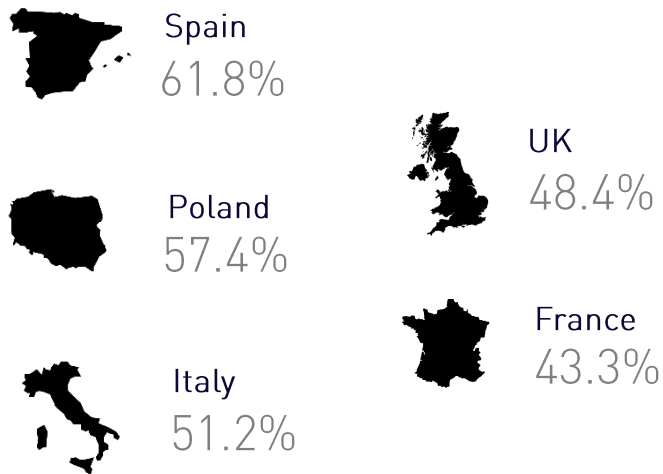
TRAVEL INTENTIONS



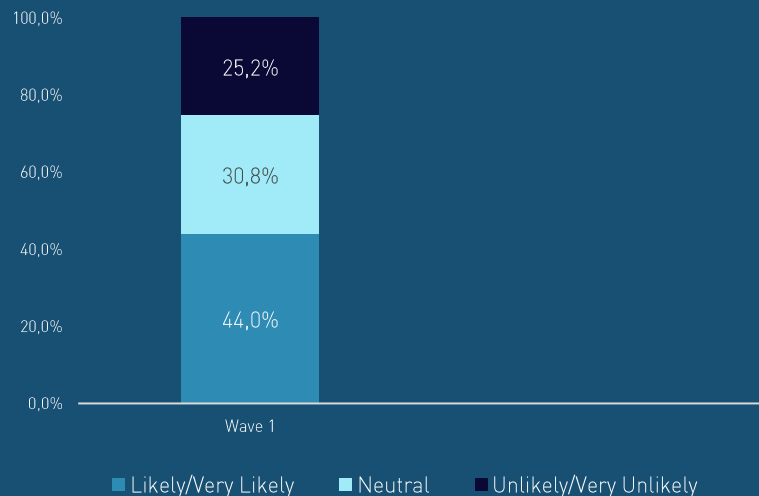
01

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

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

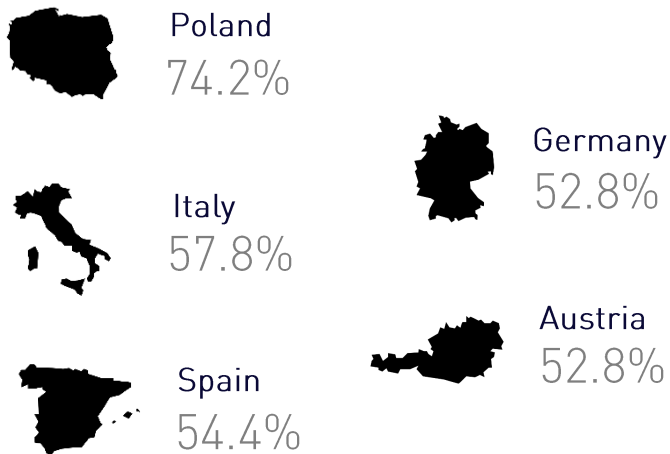


Intention to re-schedule a pre COVID-19 trip immediately after a treatment/ vaccine is found

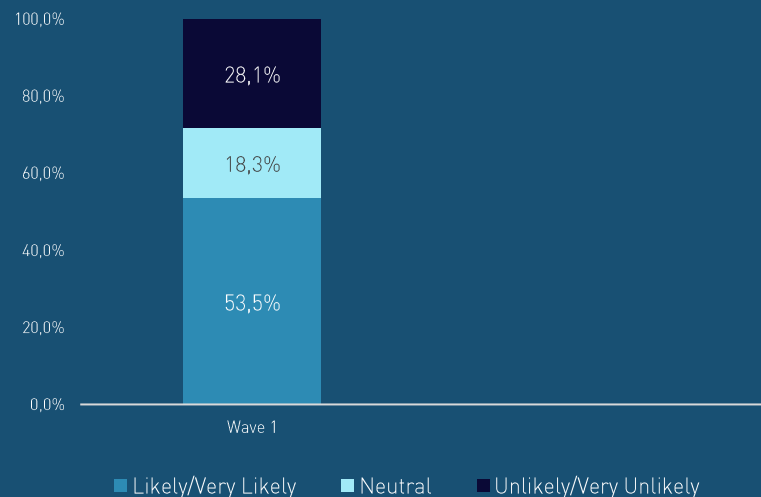


Optimism about travel remains with over half of respondents intending to take a trip, domestically or within Europe, in the next 6 months

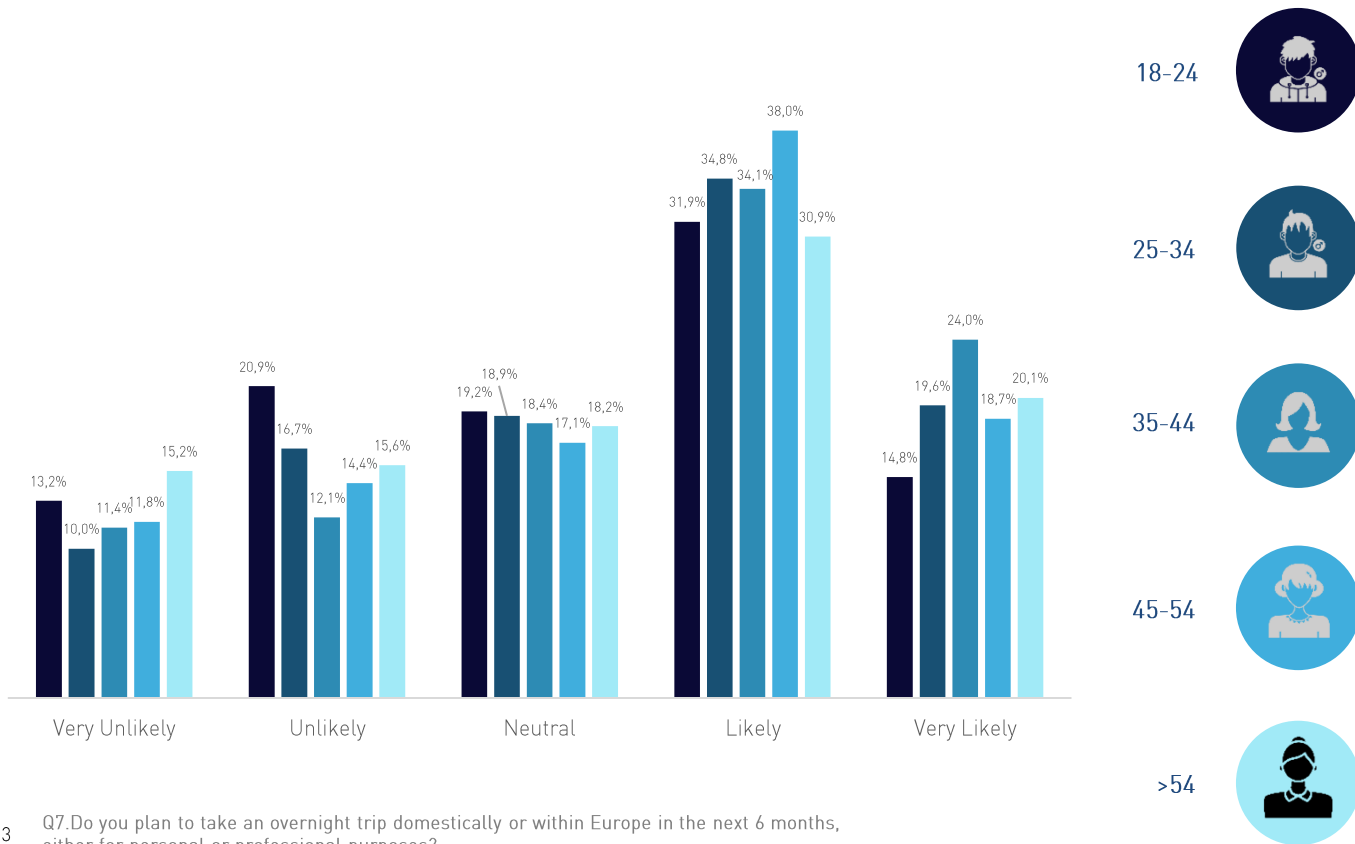
Top 5 markets which are most likely to travel in the next 6 months



Intention to travel in the next 6 months



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



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

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

Sun & beach lovers

Bleisure travellers

Business travellers

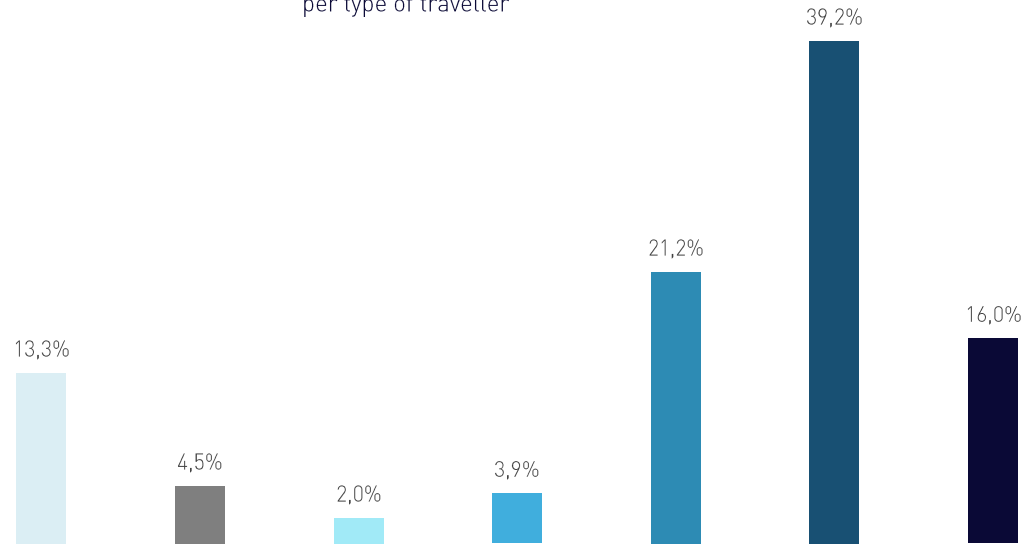
Explorers of cultural identity & roots

Immersive explorers

City life enthusiasts

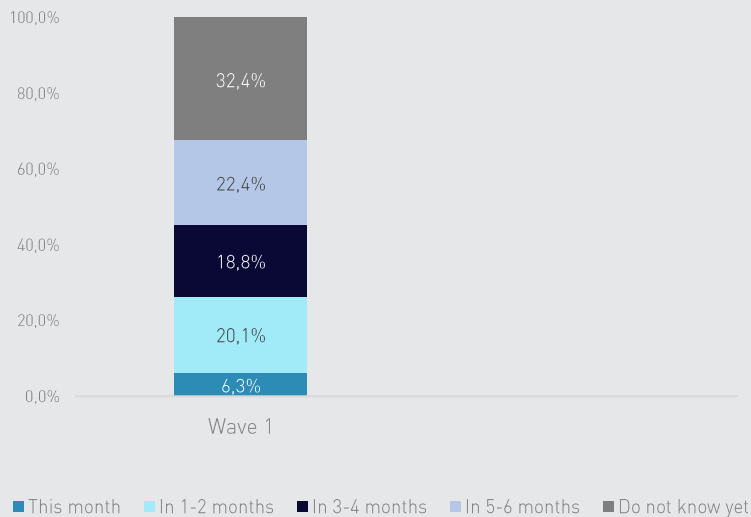
Gastronomy lovers

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



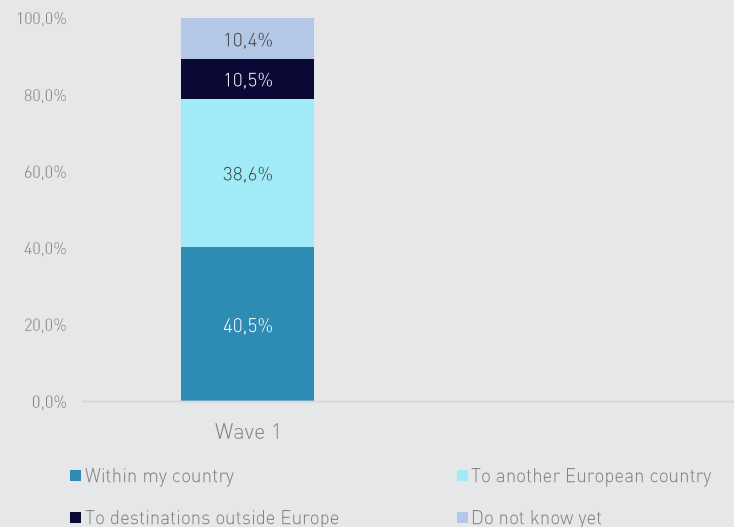
More than 1 out of 4 respondents intend to travel until November 2020 having either domestic or intra-European trips as top choices

When will Europeans travel next



For specific dates please refer to slide 9

Where will Europeans travel within the next 6 months

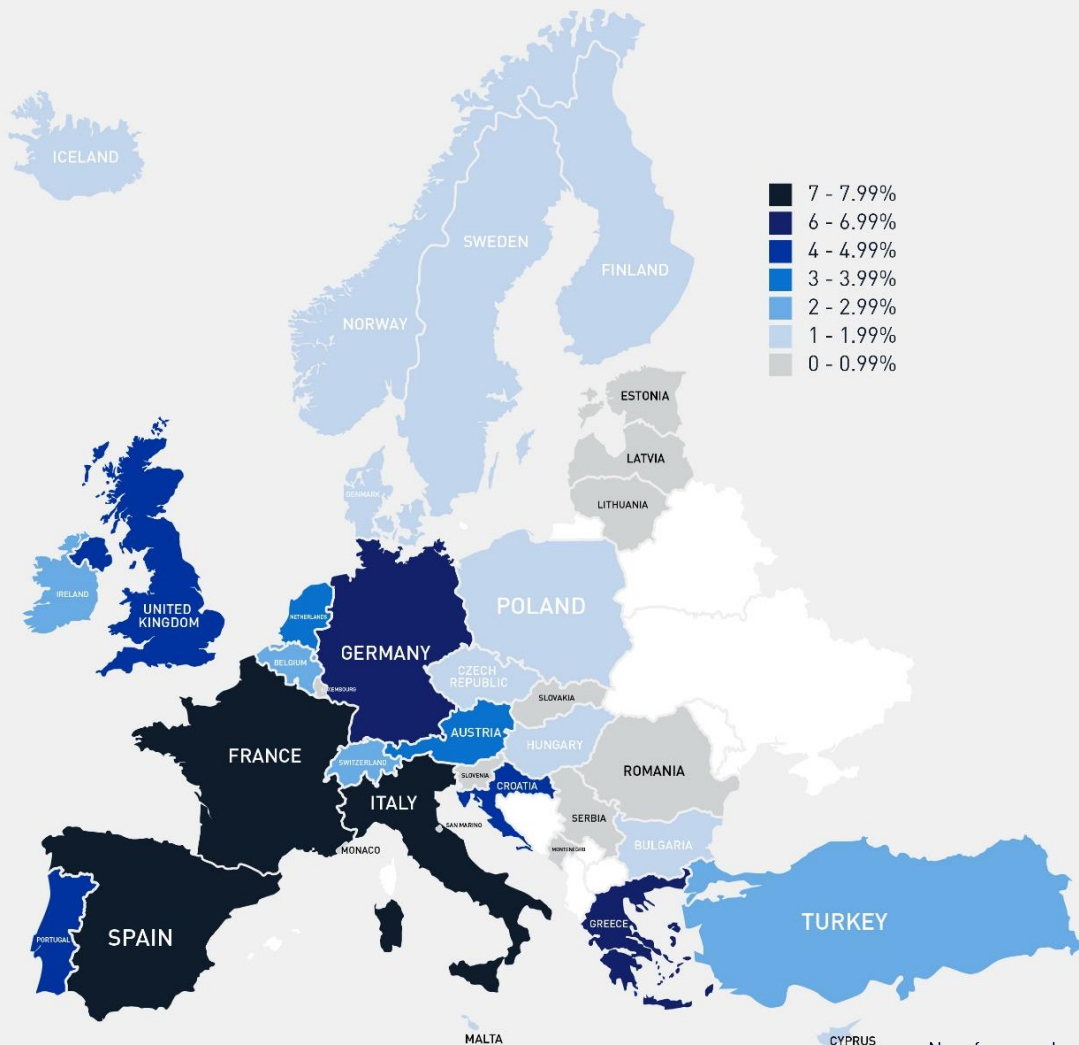


PREFERRED COUNTRIES FOR INTRA-EUROPEAN TRAVEL

Which countries respondents intend to visit next

TOP 10 COUNTRIES

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



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



Top 3 markets to resume leisure travel



Poland
50.2%



Italy
43.3%



Spain
35.2%



Top 3 markets to resume business travel



Spain
7.2%

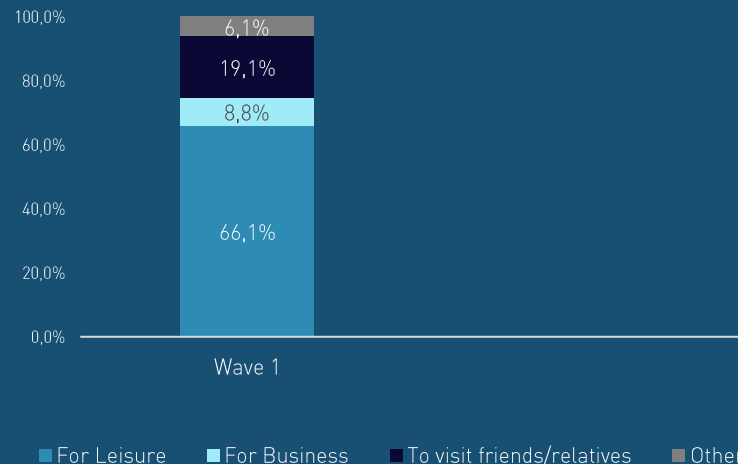


Poland
6.2%



Austria
6.0%

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



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

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



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

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



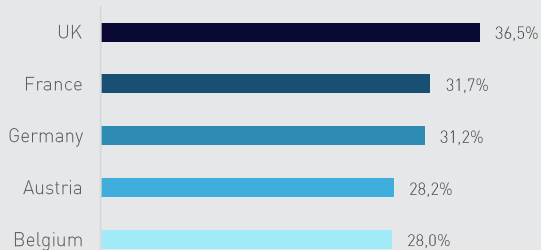
The most preferred destinations for **nature and outdoors** are France, Italy and Germany



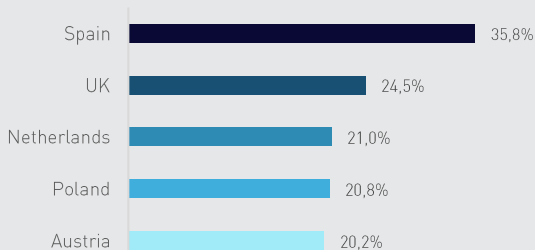
Sea, sun and beach is more popular among UK respondents, city breaks among respondents from Spain. Nature is top of mind among Germans while Italians favor culture the most



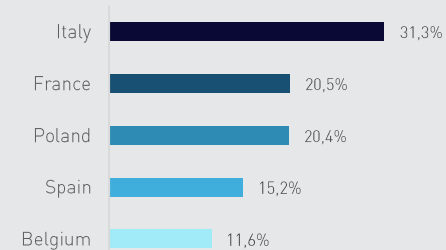
Sea, Sun, & Beach



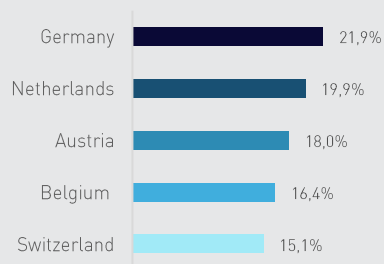
City Break



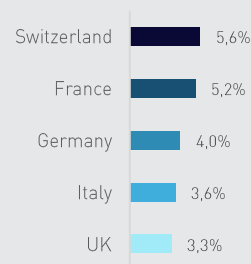
Culture & Heritage



Nature & Outdoors



Cruising

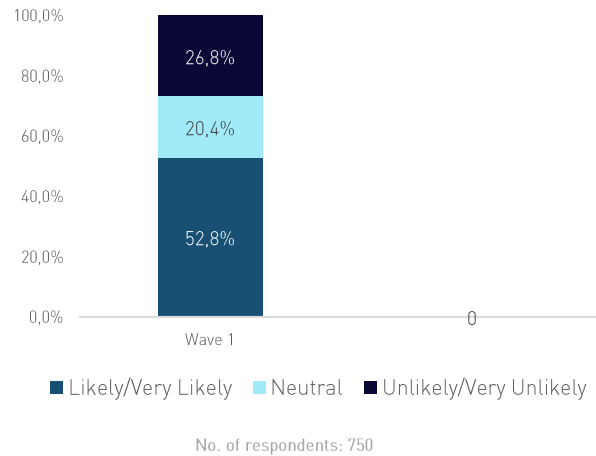


GERMANY

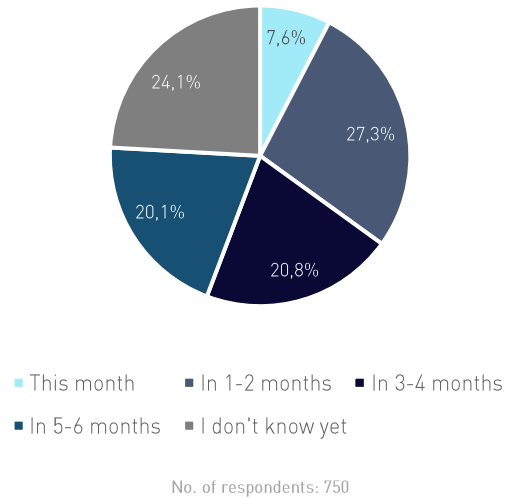
More than 1 in 2 respondents intend to travel in the next 6 months having similar preference for domestic and European destinations



Willingness to travel in the next 6 months

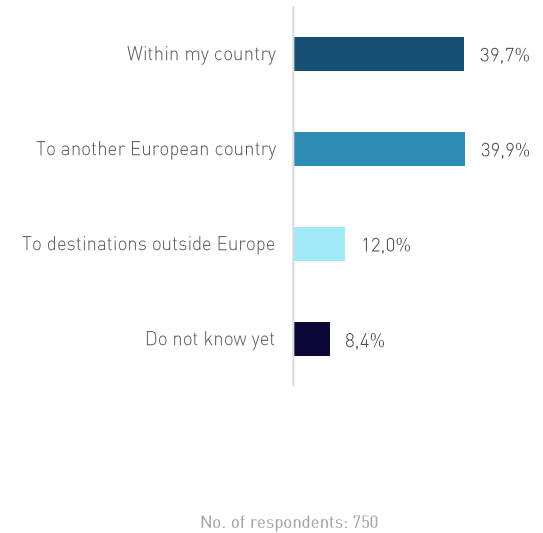


When will Germans travel



For specific dates please refer to slide 9

Where will Germans travel within the next 6 months

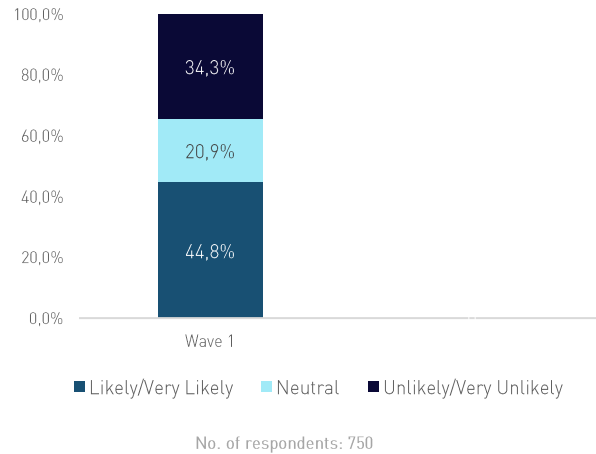


UNITED KINGDOM

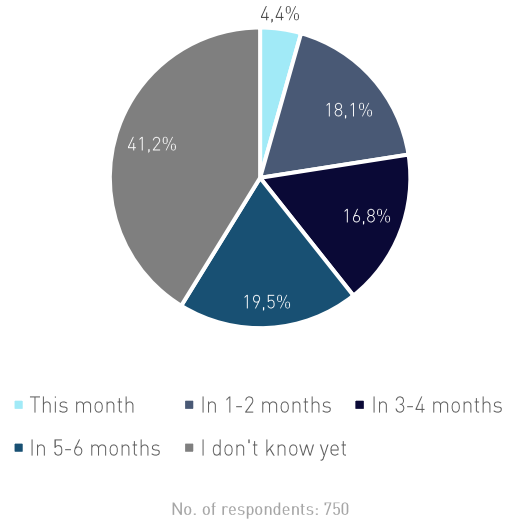
More than 4 in 10 respondents are uncertain as to the timing of their next trip, while they show a stronger preference for domestic destinations



Willingness to travel in the next 6 months

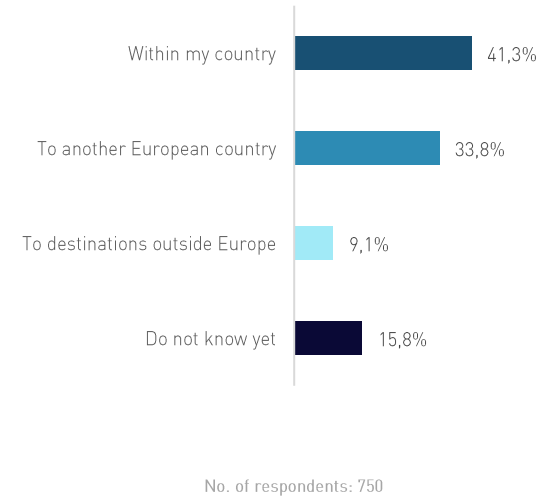


When will British travel



For specific dates please refer to slide 9

Where will British travel within the next 6 months

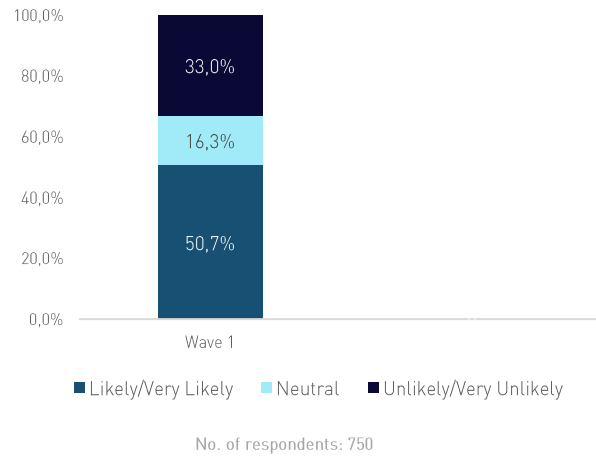


FRANCE

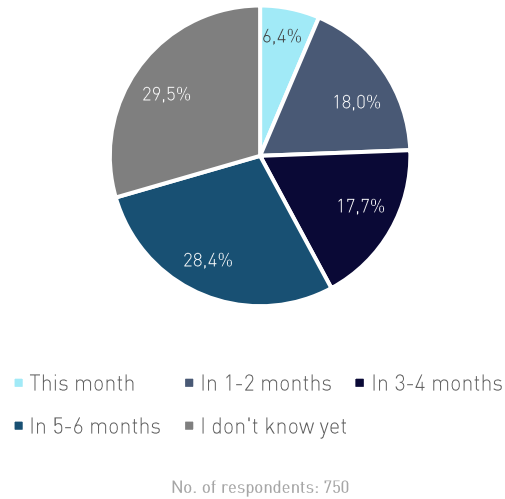
1 in 2 respondents intend to travel in the next 6 months, mostly in their own country



Willingness to travel in the next 6 months

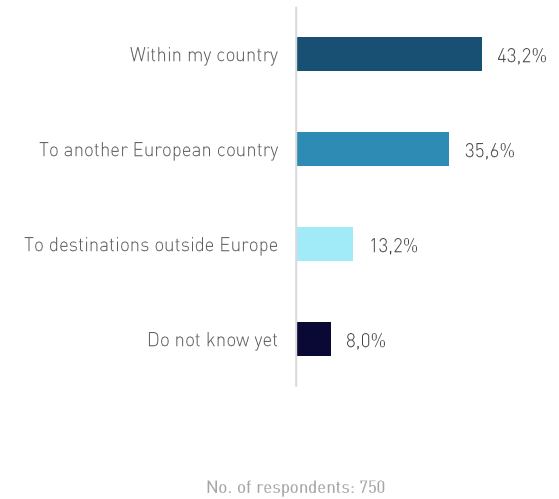


When will French travel



For specific dates please refer to slide 9

Where will French travel within the next 6 months

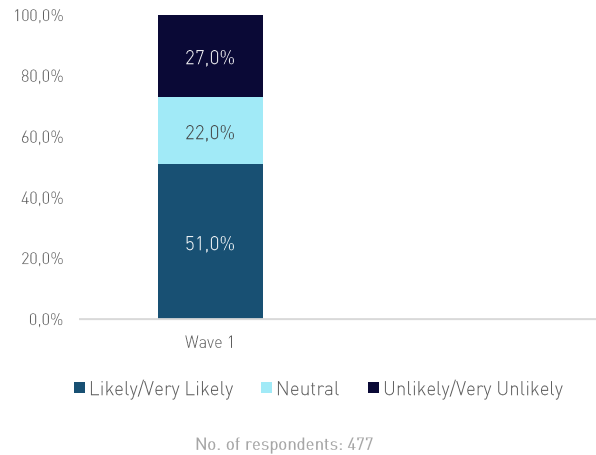


NETHERLANDS

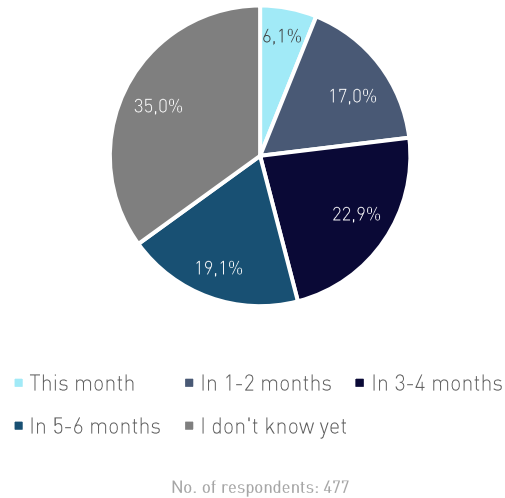
More than 1 in 2 respondents intend to travel in the next 6 months and by a large majority will visit other European destinations



Willingness to travel in the next 6 months

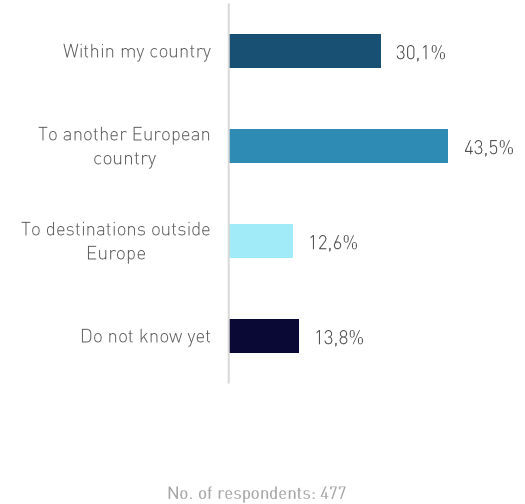


When will Dutch travel



For specific dates please refer to slide 9

Where will Dutch travel within the next 6 months

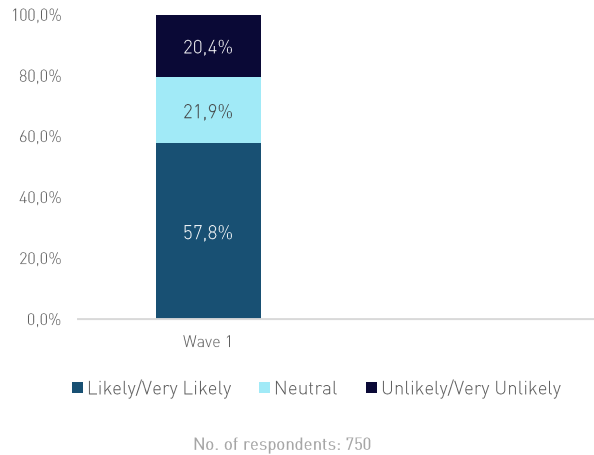


ITALY

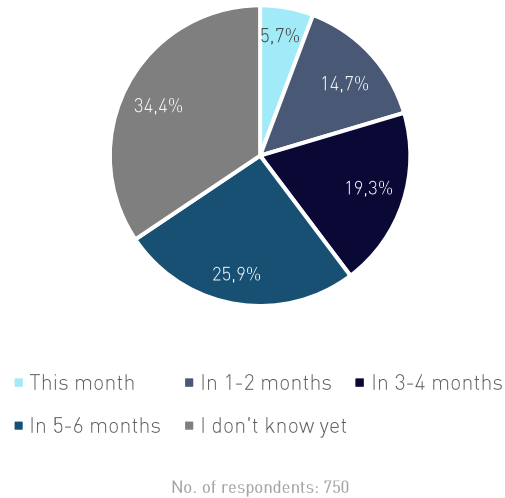
Almost 6 in 10 respondents intend to travel in the next 6 months, by a vast majority inside their own country



Willingness to travel in the next 6 months

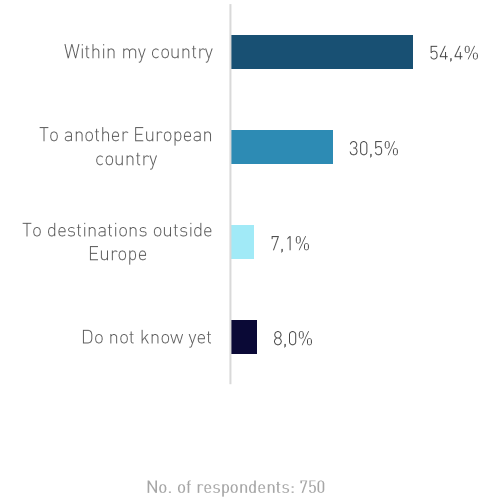


When will Italians travel



For specific dates please refer to slide 9

Where will Italians travel within the next 6 months

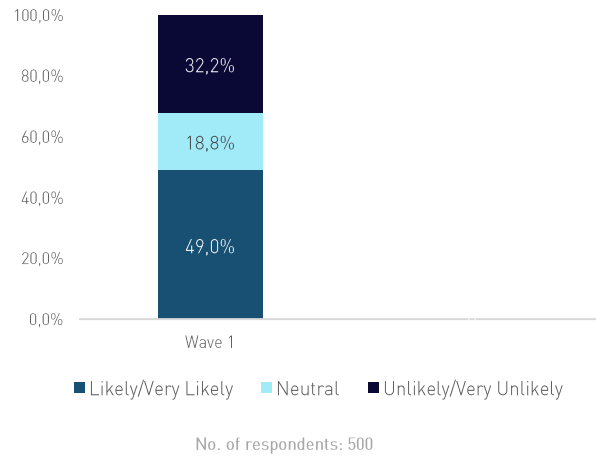


BELGIUM

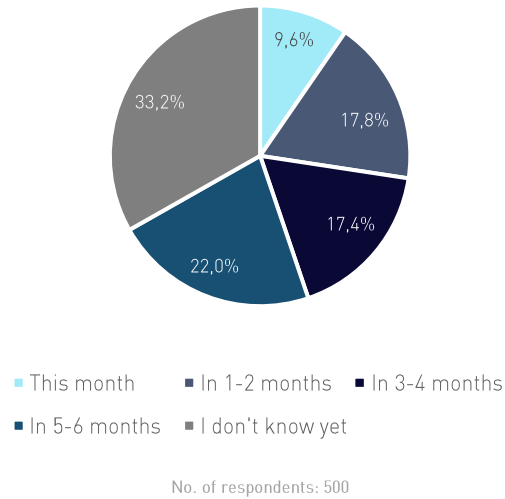
Almost 1 in 2 respondents intend to travel in the next 6 months, and the majority are eager to visit another European country



Willingness to travel in the next 6 months

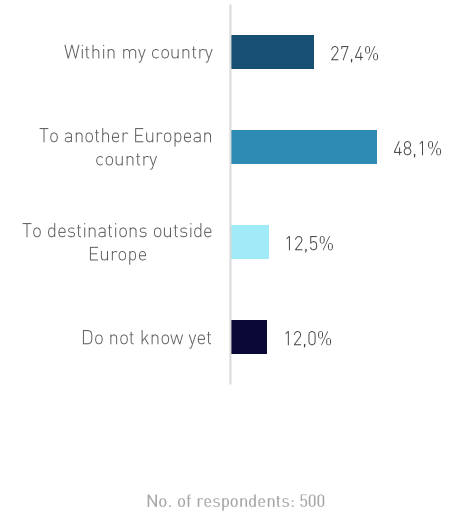


When will Belgians travel



For specific dates please refer to slide 9

Where will Belgians travel within the next 6 months

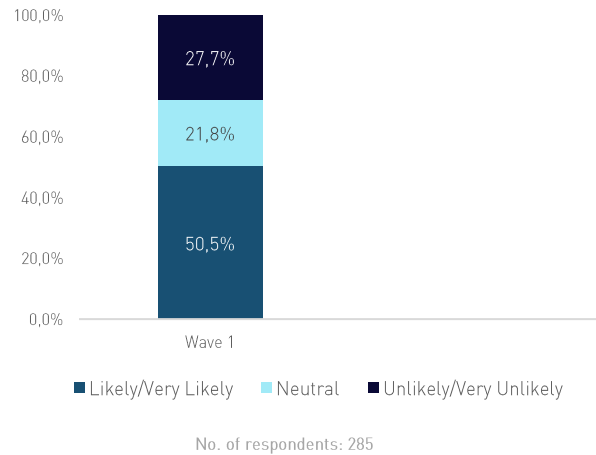


SWITZERLAND

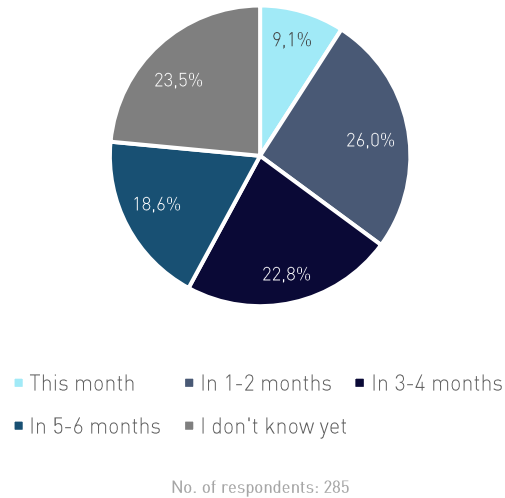
Nearly 1 in 2 respondents intend to travel in the next 6 months and tend to be more confident with respect to the timing of the trips planned



Willingness to travel in the next 6 months

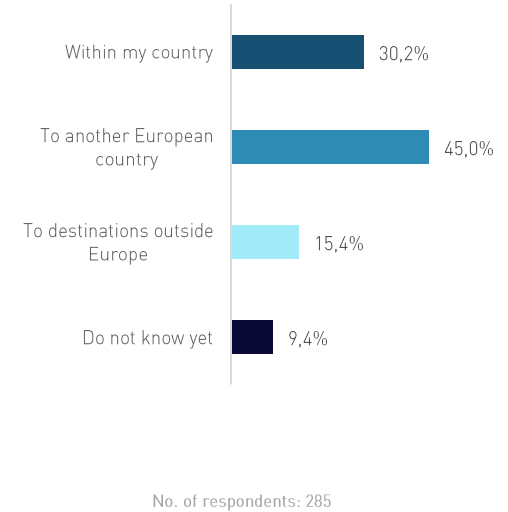


When will Swiss travel



For specific dates please refer to slide 9

Where will Swiss travel within the next 6 months

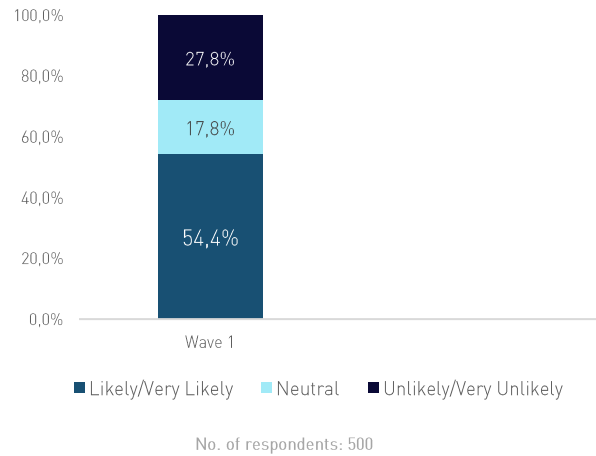


SPAIN

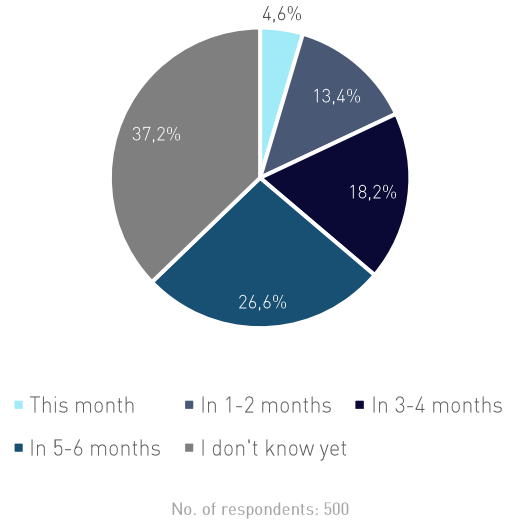
More than 1 in 2 respondents intend to travel over the next 6 months, mainly favoring domestic destinations



Willingness to travel in the next 6 months

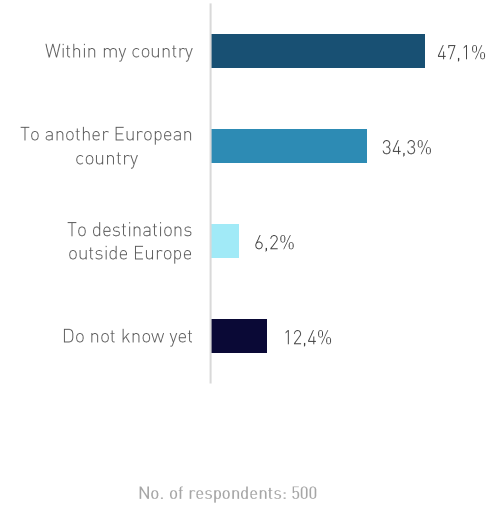


When will Spanish travel



For specific dates please refer to slide 9

Where will Spanish travel within the next 6 months

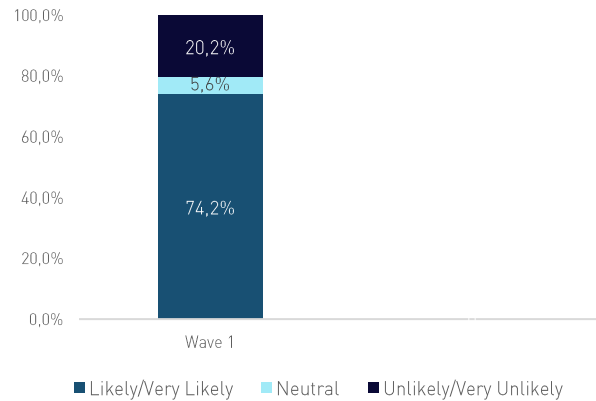


POLAND

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

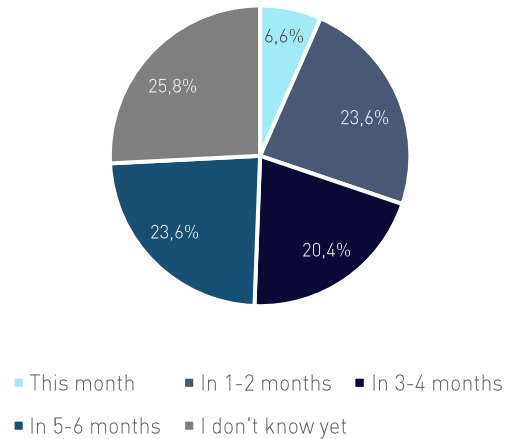


Willingness to travel in the next 6 months



No. of respondents: 500

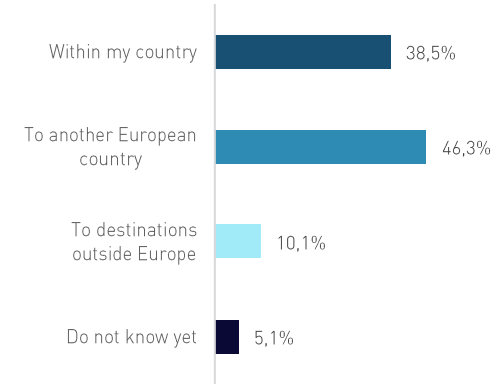
When will Polish travel



No. of respondents: 500

For specific dates please refer to slide 9

Where will Polish travel within the next 6 months



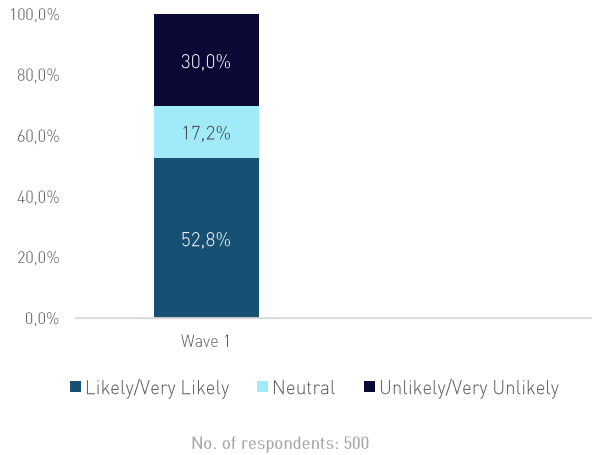
No. of respondents: 500

AUSTRIA

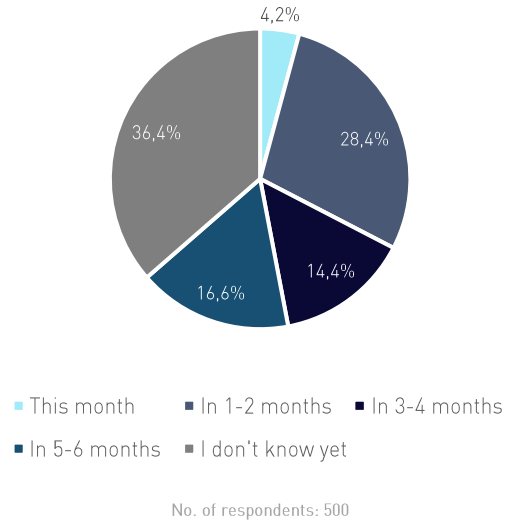
More than 1 in 2 respondents intend to travel in the next 6 months showing a similar preference for domestic and European destinations



Willingness to travel in the next 6 months

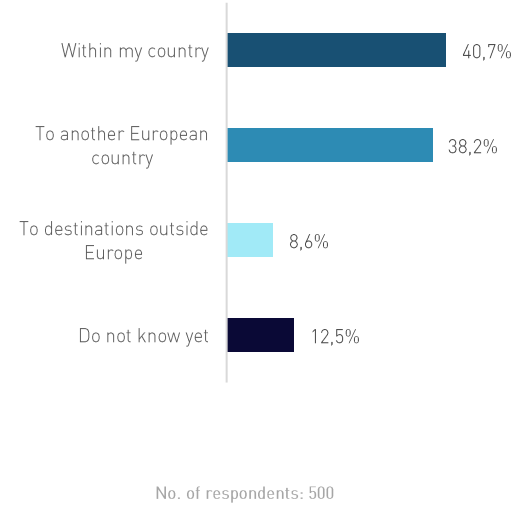


When will Austrians travel



For specific dates please refer to slide 9

Where will Austrians travel within the next 6 months



TRIP PLANNING



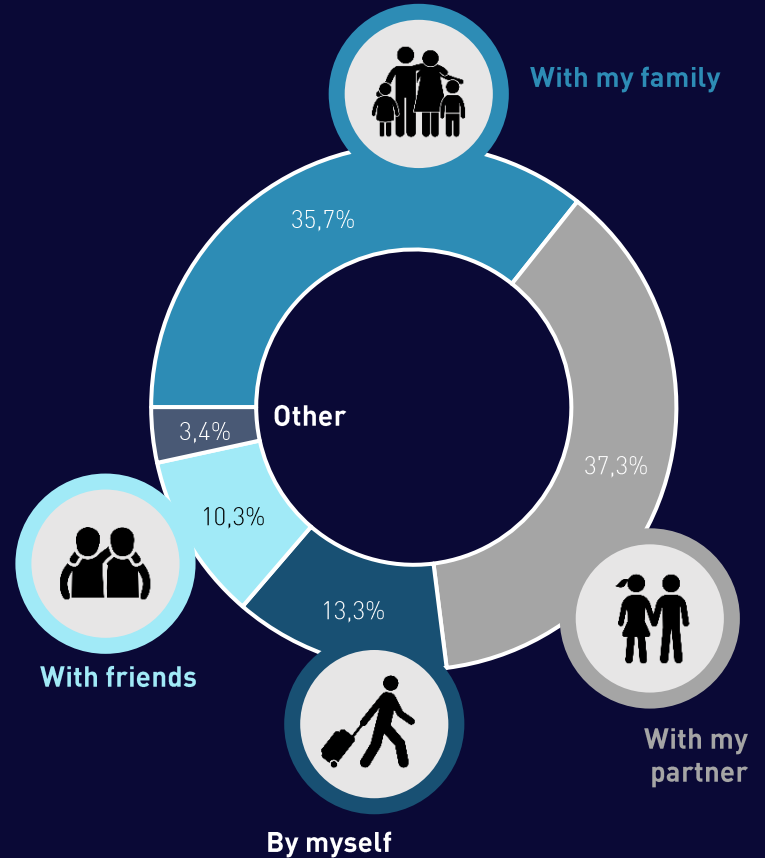
The majority of respondents with short-term travel plans, intend to travel either with their partner or family

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



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

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



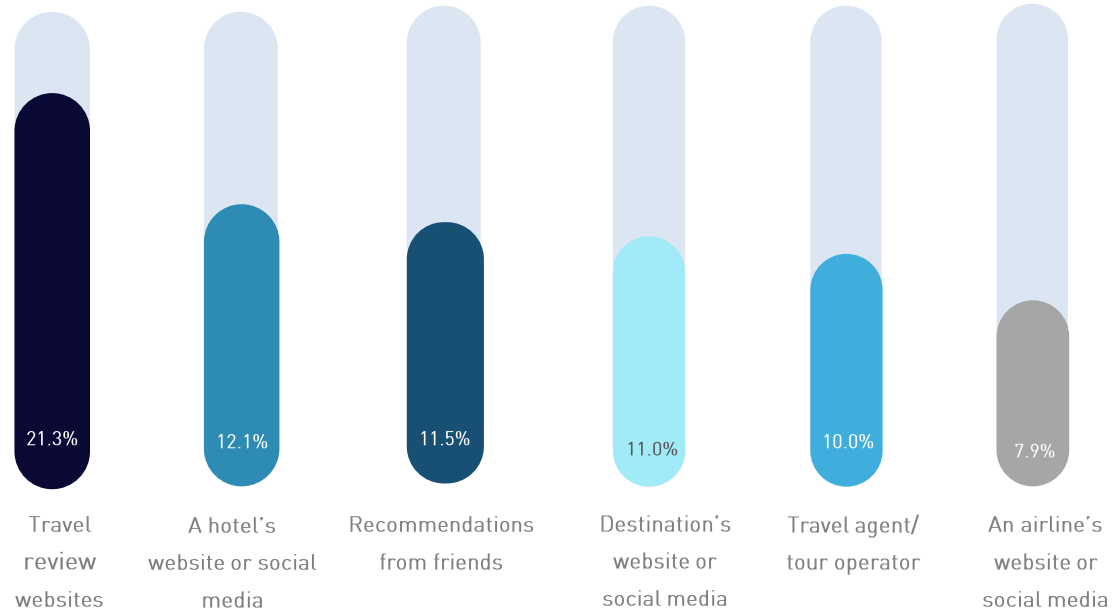
Travel review websites are the major source of information but hotels/ destinations' digital assets and recommendations from friends are also taken into account

2 out of 3

respondents will rely on digital sources when planning their next trip

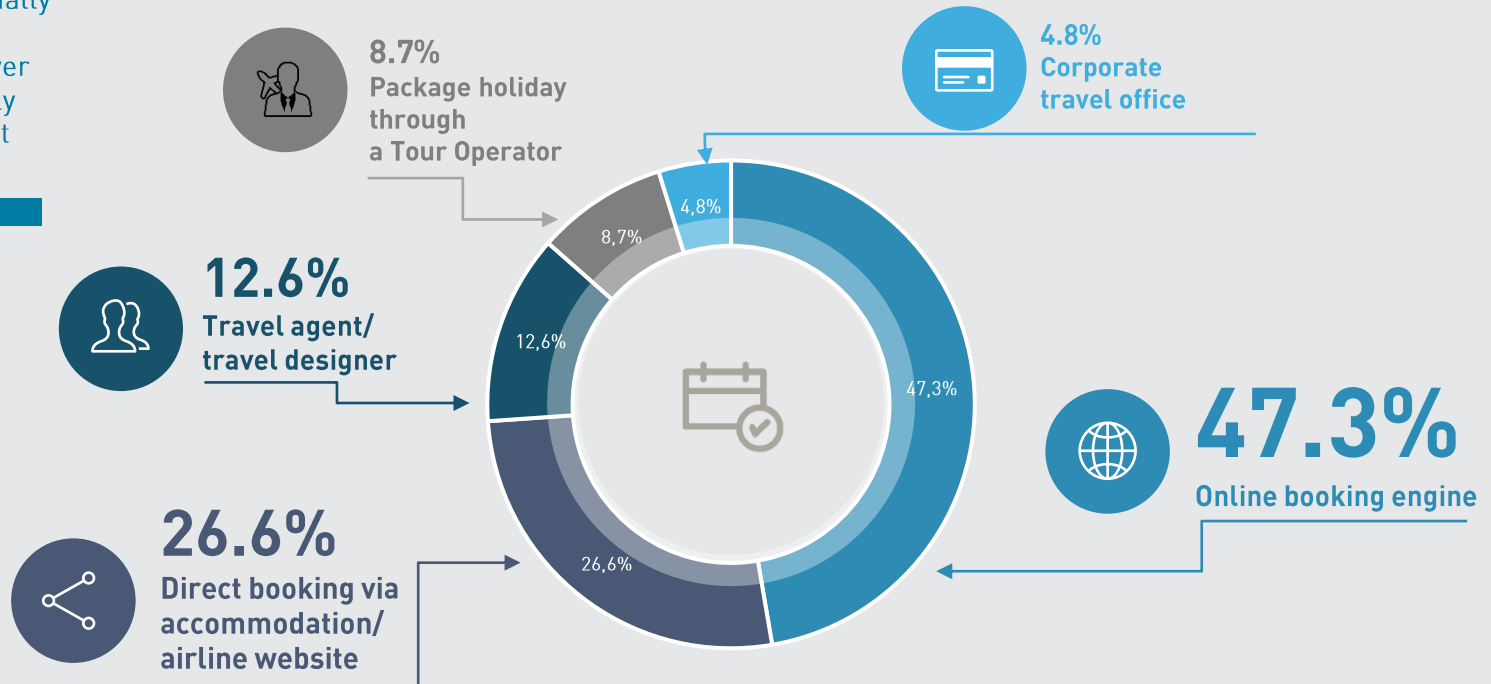


Preferred source of information for respondents most likely to travel in the next 6 months



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

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



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

No. of respondents: 3,086

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

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



 Spain
71.7%

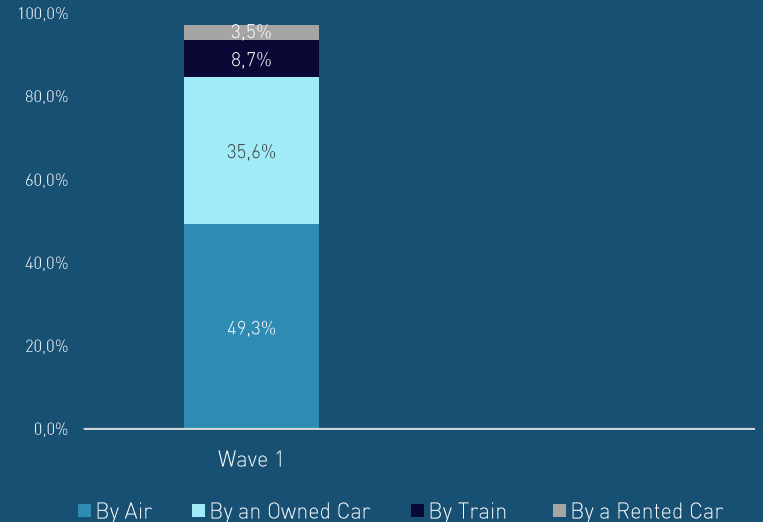
 France
56.6%

 UK
67.0%

 Poland
52.6%

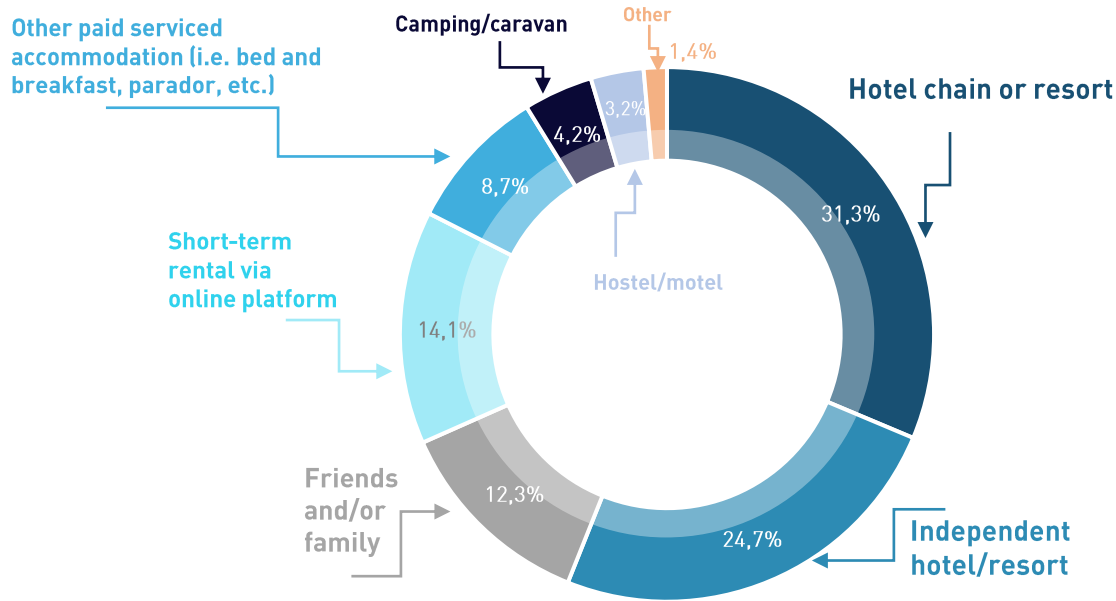
 Italy
61.2%

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



Hotel or resort chains are the top choice of accommodation

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



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



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

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



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

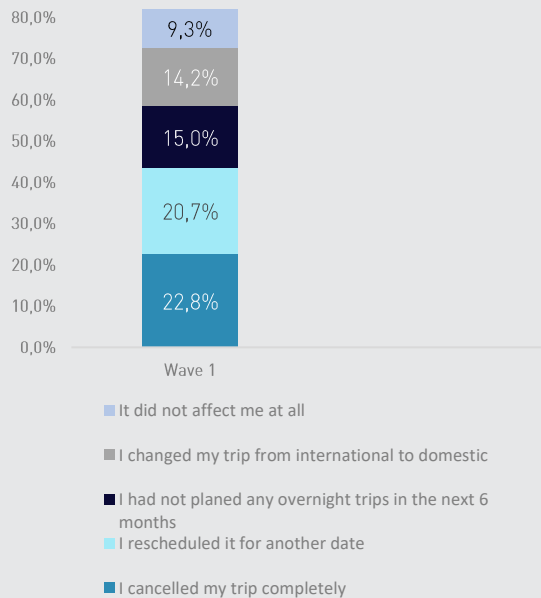
TRAVEL CONCERNS



03

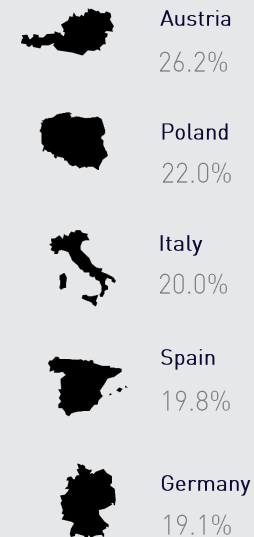
Is COVID-19 truly a trip killer? While a majority of respondents cancelled their short-term travel plans, a significant portion either rescheduled or pivoted trips to domestic destinations

How has COVID-19 affected travel plans

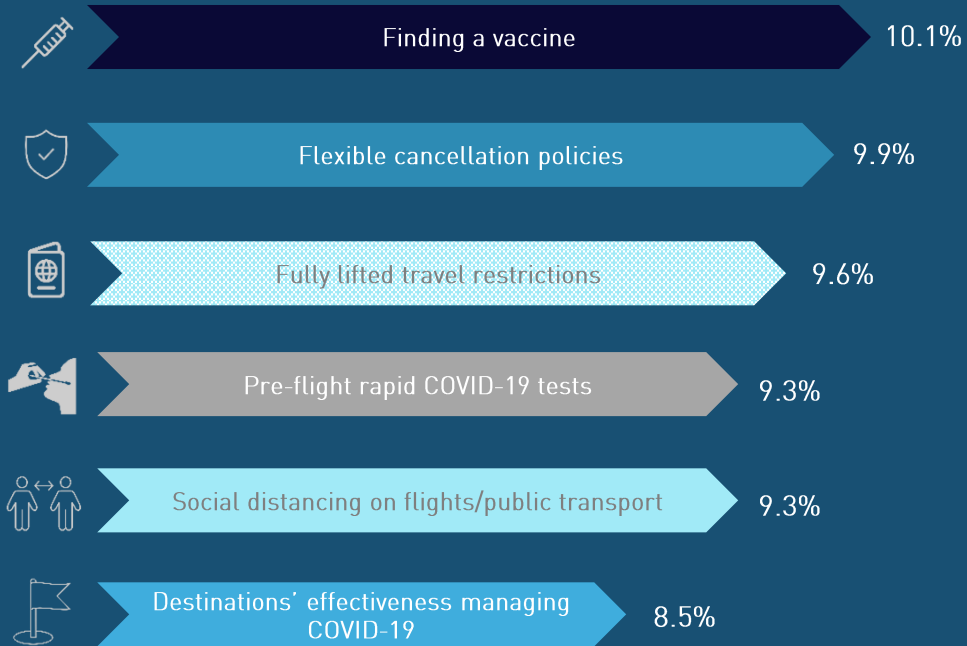


Respondents aged 35-44 are the most resilient age group, taking their initial trip or making only a few changes

Top 5 markets which chose a domestic trip over international



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

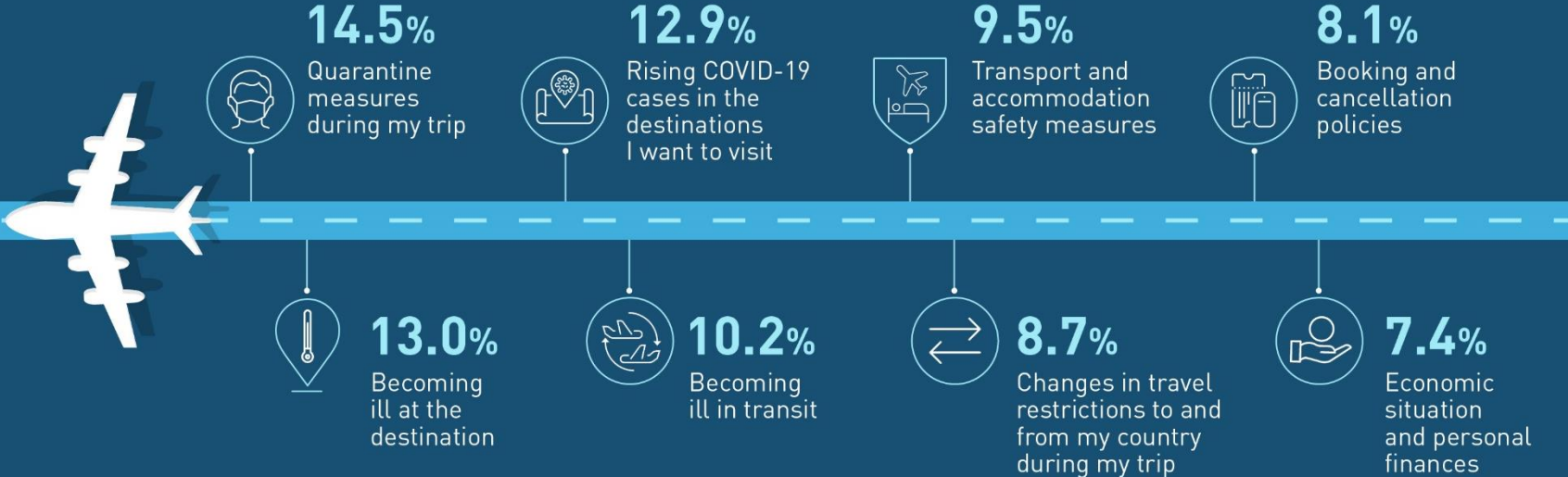


In an era of uncertainty, **flexible cancellations policies** are a priority for encouraging consumers to book and much more important than offers and deals.

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

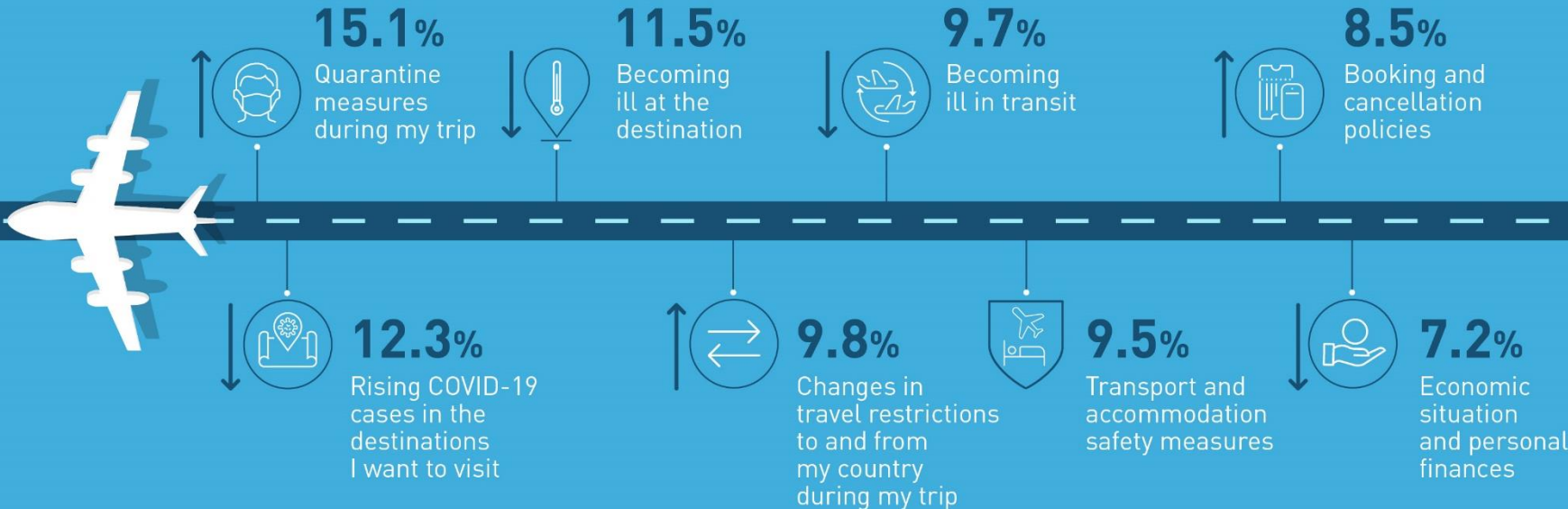
SIZING UP TRAVEL ANXIETIES

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



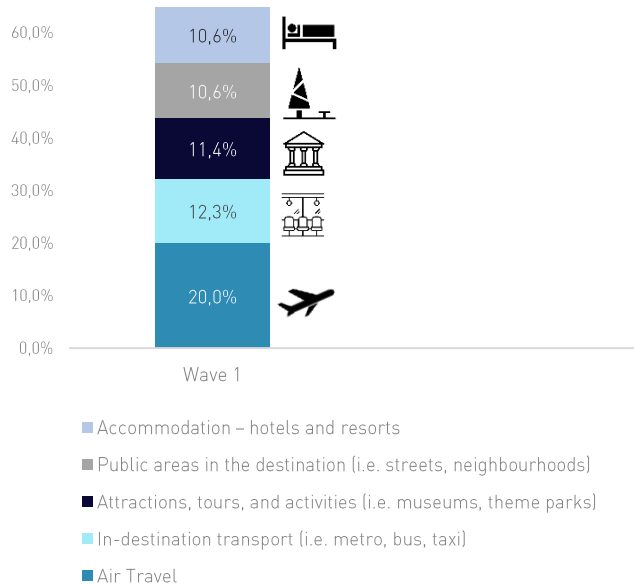
TRAVEL CONCERNS OF “EARLY BIRD” TRAVELLERS

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



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

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



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

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

THE UNCERTAINTY CONTROL PANEL

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

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



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

9.9%



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

8.1%



32.4% of respondents state that they do not know when they intend to go on their next trip

32.4%



10.4% of respondents state that they do not know where they intend to travel in the next 6 months

10.4%

METHODOLOGICAL
ANNEX



04

METHODOLOGICAL ANNEX

THE SURVEY

- Online market research survey
- Distribution/ data collection period: 27 August 2020 - 15 September 2020
- Consumers with at least 2 overnight trips in 2019 participated in the survey
- 5,762 respondents in total, from 10 high-volume source markets
 - Countries: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
 - Languages: English, French, German, Italian, Spanish, Polish and Dutch.
- Research themes examined: Travel personas (1 question), Travel concerns and COVID-19 impact on travel (6 questions), Travel intentions, preferences and trip planning (10 questions), COVID-19 and responsible travel (3 questions)
- 51% of respondents are male and 49% are female
- Number of respondents and age group per source country:

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

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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.gr) and should be interpreted by users according to their needs.

Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to completely eliminate every margin of error.

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