



MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 7 | 07/21

Co-funded by
the European Union



EUROPEAN
TRAVEL
COMMISSION

WAVE 7

RESEARCH HIGHLIGHTS



This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the 7th wave of market research¹ initiated in September 2020. Responses are collected from Europeans in 10 high-volume source markets, in light of the COVID-19 crisis.

- **Travel sentiment in Europe rebounds strongly**, with 70% of Europeans planning to travel in the next 6 months — a 26% surge since the previous research wave ([Wave 6](#)).
- As summer reaches its peak, **2 in 3 Europeans intend to travel for leisure** and **20% to visit friends and family**.
- For over half of Europeans, **vaccination roll-out is key to restore their travel confidence** and book a trip in the coming weeks or months.
- **57% of respondents believe that the introduction of the EU Digital COVID Certificate will facilitate travel by increasing confidence and booking.**

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RESEARCH HIGHLIGHTS

- Half of Europeans planning to travel in the next 6 months would like to visit another European country, with 28% eyeing a neighboring destination, while another 36% favour domestic travel.
- 40% of 'early-bird' travellers¹ will plan a sun & beach / coast & sea holiday, with August-September being the most preferred travel months.
- 30% of 'early-bird' travellers will travel for 4-6 nights and a similar share (29%) will travel for 7-9 nights. 29% of Europeans will invest 500-1,000€ in their upcoming trip, while 45% will spend 1,000-2,500€ on their next overnight trip.
- Responding to the dynamics of COVID-19, only 22% of 'early-bird' travellers have booked / arranged all the travel and accommodation components for their next trip.
- Enjoying life in a relaxing environment, escaping from routine and spending quality time with family and friends are what Europeans miss the most about travelling.

WAVE 7

RESEARCH HIGHLIGHTS

- Getting vaccinated for COVID-19 appears to be the most critical factor in restoring travellers' confidence, twice as important as fully lifted travel restrictions.
- With air travel and in-destination transportation remaining the most worrisome touchpoints for a third of respondents, **39% of Europeans will use their own car for their next trip.**
- Quarantine measures continue to be the primary concern for travelling within Europe, followed by the number of COVID-19 cases at the destination and becoming ill during the trip.



WAVE 7

RECOMMENDATIONS FOR DESTINATIONS



- Considering the importance of the COVID-19 vaccine for restarting travel, **destinations' marketing campaigns should specifically target age groups and markets with high vaccination rates and highlight local progress in vaccine rollout.**
- 2 in 3 'early-bird' travellers prefer domestic destinations or visiting a neighbouring country, and interest in travelling by car is growing. Both indicators should guide **destinations to use geographical proximity as an aspect to redefine their source markets.**
- As almost 60% of Europeans are planning to stay for over a week, **destinations should create a rich value proposition** that highlights both the variety of available activities and the opportunity to deep-dive into a specific experience of choice.
- In an effort to sustain the Europeans' **positive travel sentiment and travel resumption**, tourism organisations should start strategising their marketing for Q4 2021, to promote urban getaways, immersive experiences and gastronomy products, top on respondents' wish lists in Q4 2020.
- Considering respondents' concerns about in-destination transportation, **destinations should highlight the availability of alternative and more sustainable mobility options**, such as bike rental, shared electric scooters or walking.

WAVE 7

RECOMMENDATIONS FOR BUSINESSES



- Hotels / attractions catering to families **should mainly portray themselves as the ideal setting for spending quality time together**, while businesses targeting couples **should focus more on enjoyment and relaxation**.
- To capitalise on the growing segment of Europeans who are driving to destinations, **businesses and attractions should promote themselves to travellers on the road using location-based apps, mobile phone map apps and driving navigation apps**.
- Considering that 78% of Europeans planning to travel have not yet booked all the travel components for their next trip, **businesses should introduce last-minute deals and design campaigns for short booking windows**. While this is valid for all travellers, it is of even greater importance for Europeans planning a domestic trip.
- As travel by car permits last-minute schedule changes and airlines are offering highly flexible terms for changing tickets, **large-scale hotels and resorts could capitalise on this opportunity by promoting 'on-the-spot' offers to motivate their guests to stay beyond the departure date originally booked**.



CONTENTS

01.

TRAVEL
INTENTIONS

P. 9

02.

TRIP
PLANNING

P. 29

03.

TRAVEL
CONCERNS

P. 36

04.

METHODOLOGICAL
ANNEX

P. 42

How to read

Wave 7

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

	Wave 4	Wave 5	Wave 6	Wave 7
Surveys dates	20 Nov – 3 Dec '20	18 Dec '20 – 7 Jan '21	5-19 Feb '21	19-29 May '21

2. To present Wave 7 timings in which respondents are most likely to take their next trip, the following time periods should be used as a reference:
 - This month; May 2021.
 - In 1-2 months; June – July 2021.
 - In 3-4 months; August – September 2021.
 - In 5-6 months; October – November 2021.
3. To present data and insights, the following distinct groups have been analysed:
 - Total respondents; 5,921
 - Respondents with short-term travel plans/most likely to travel in the next 6 months ('early-bird' travellers); 4,160
 - Respondents selecting outbound European destinations; 4,108
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.

TRAVEL INTENTIONS



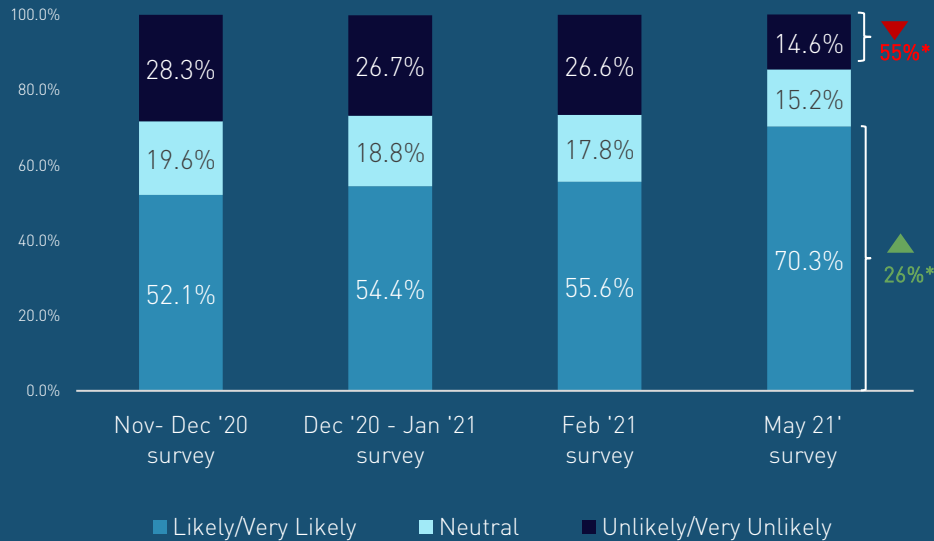
01

70% of Europeans plan to travel in the coming 6 months – The highest result since September 2020

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



Intention to travel in the next 6 months



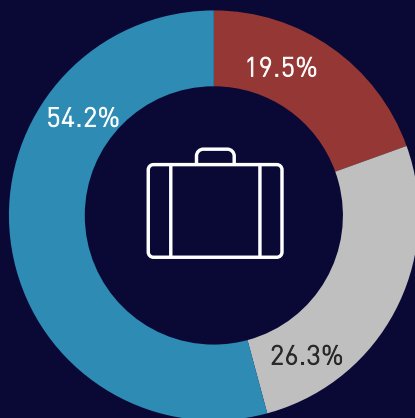
Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

* % change vs previous survey period

No. of respondents: 5,921

For over half of Europeans, vaccination roll-out is key to both regaining confidence in travel and booking an upcoming trip

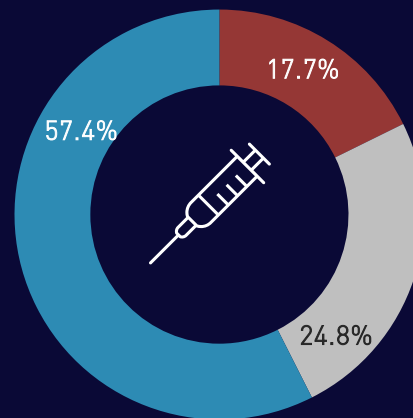
Europeans plan to book a trip once vaccinated



■ Likely/Very Likely ■ Neutral ■ Unlikely/Very Unlikely

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".

The COVID-19 vaccine rollout boosts travellers' confidence



■ Agree/Strongly agree ■ Neutral ■ Disagree/Strongly disagree

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

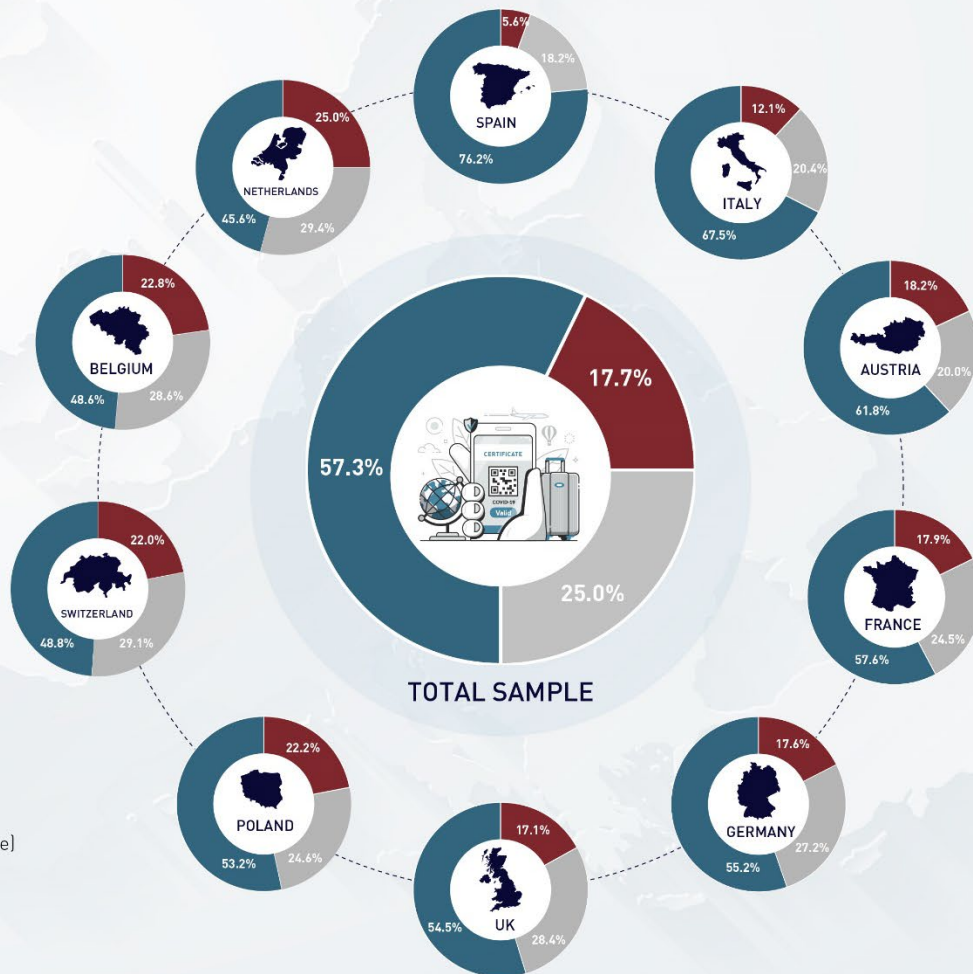
May '21 survey

EU DIGITAL COVID CERTIFICATE WILL EASE TRAVEL FOR OVER HALF OF RESPONDENTS; ONLY 18% DISAGREE WITH THE MEASURE

The importance of the EU Digital COVID Certificate increases with age: 63% of the 55+ age group agreed / strongly agreed with this statement*, vs. only 51% in the 18-24 age group

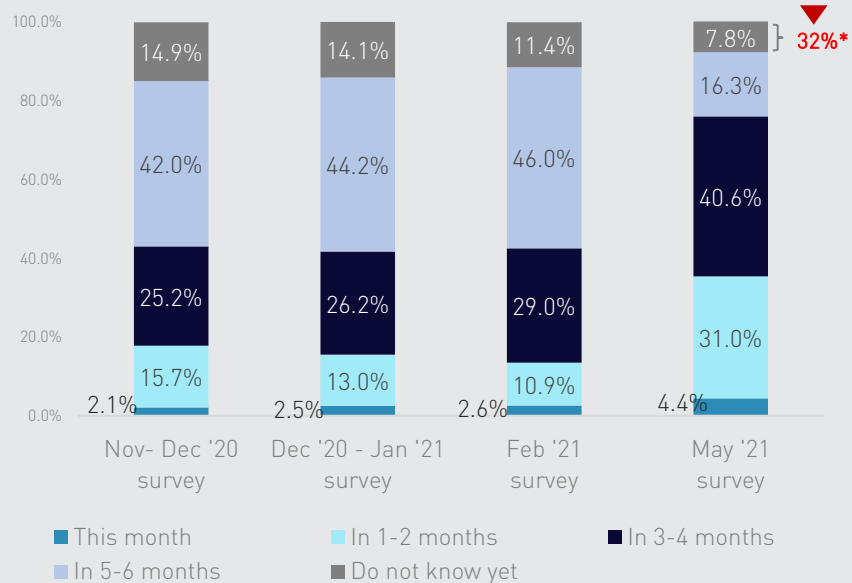
- Agree/Strongly agree
- Disagree/Strongly disagree
- Neutral

*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".



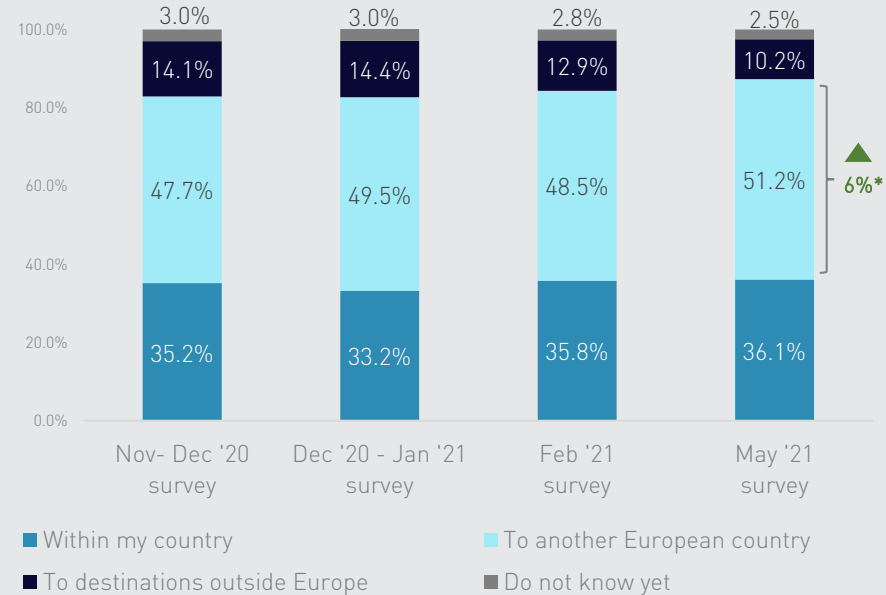
Travel interest peaks in the summer; intra-European travel continues to increase as the leading choice

When will Europeans travel next?



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

Where will Europeans travel within the next 6 months?



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

PREFERRED COUNTRIES FOR SUMMER TRIPS


Demand for Mediterranean countries highest during summer

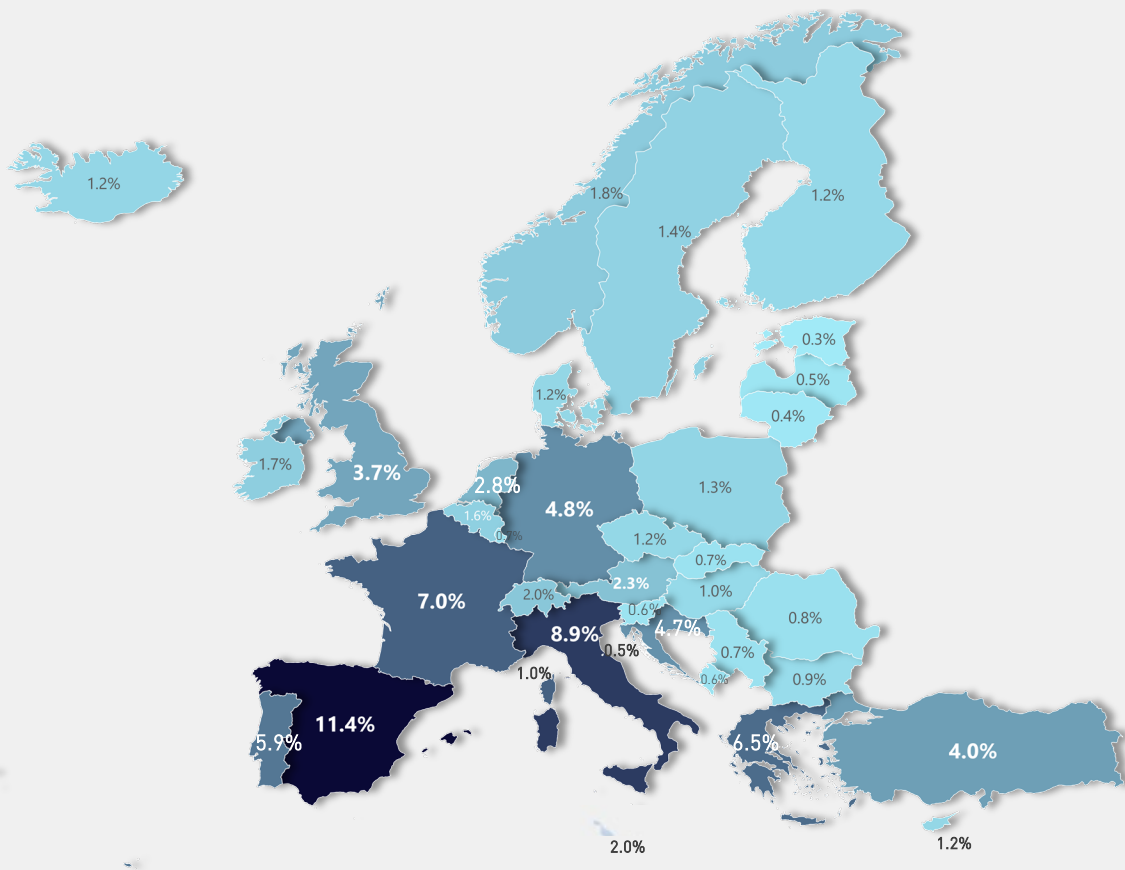
TOP 10 COUNTRIES

Spain	11.4%
Italy	8.9%
France	7.0%
Greece	6.5%
Portugal	5.9%
Germany	4.8%
Croatia	4.7%
Turkey	4.0%
United Kingdom	3.7%
Netherlands	2.8%

Please use this map as a reference only

No. of respondents: 4,108

Respondents [%] 
0.3% 11.4%



Leisure travel heats up with an 8% increase, while business travel drops to its lowest point yet



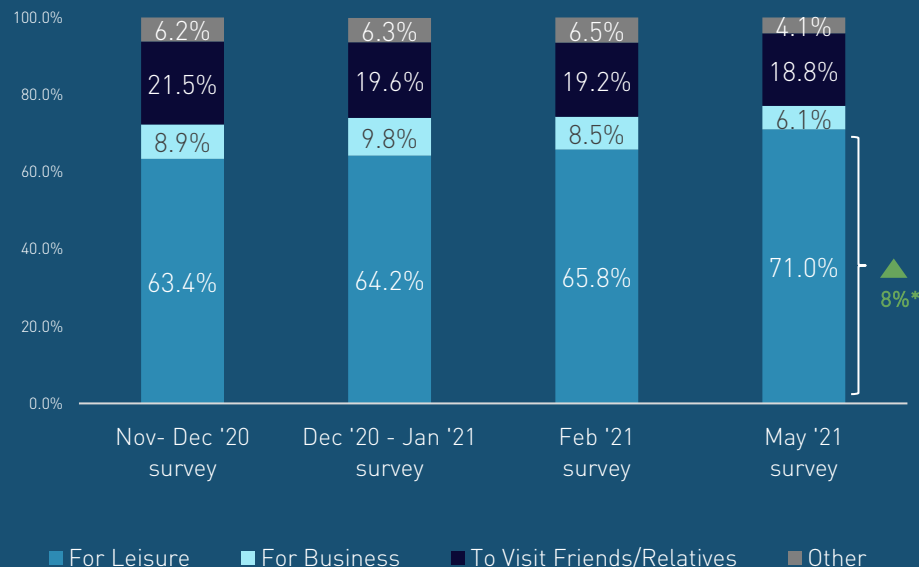
Top 3 markets to take a leisure trip



Top 3 markets to take a business trip



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



Summertime means water: 2 in 5 'early-bird' travellers will head for the sun & beach / coast & sea

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



Travellers looking for sun & beach trips showed the highest desire to enjoy life in a relaxing environment and spending quality time with family and friends, compared with the overall sample

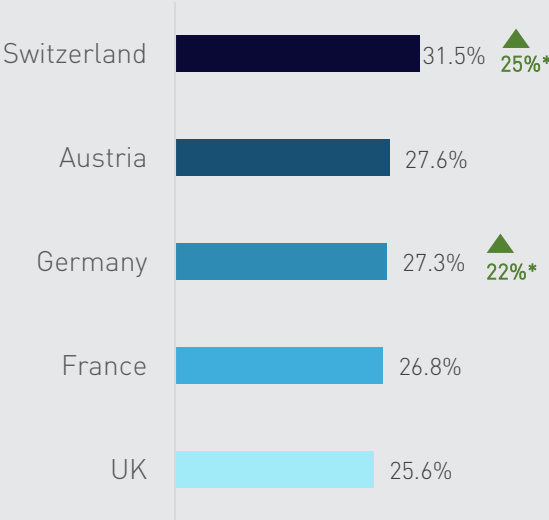
Swiss and Polish travellers show strongest desire for holidays by the water



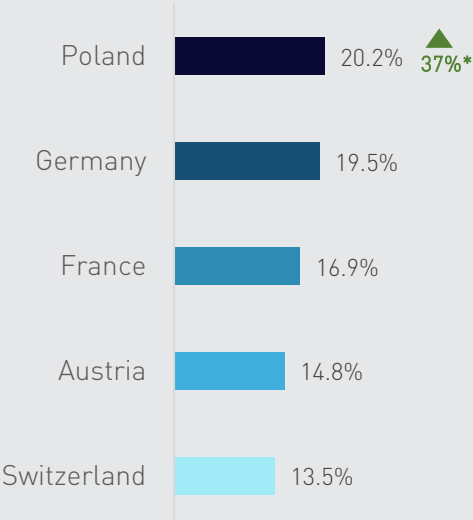
May '21 survey



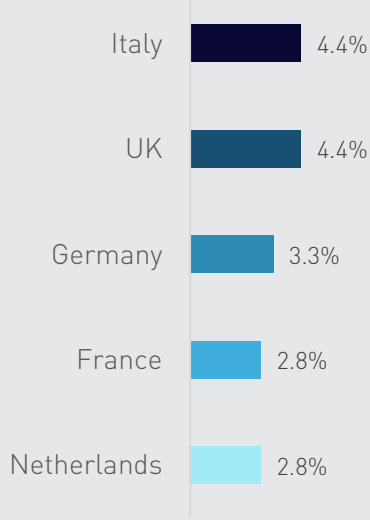
Sun & Beach



Coast & Sea



Cruising



* % changes vs previous survey period

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 31.5% of respondents from Switzerland are most likely to undertake a sun and beach trip

Spanish head for city breaks, the Dutch seek nature getaways, and Italians search for culture & heritage

May '21 survey



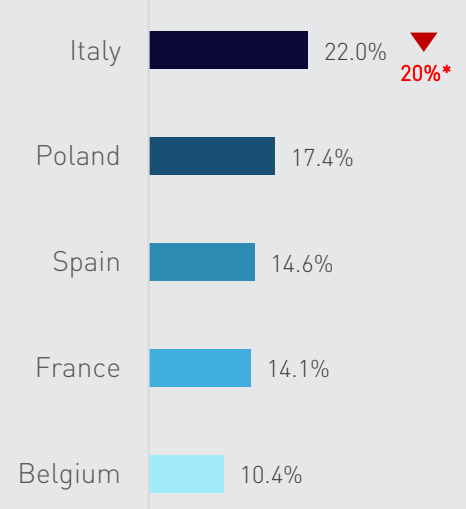
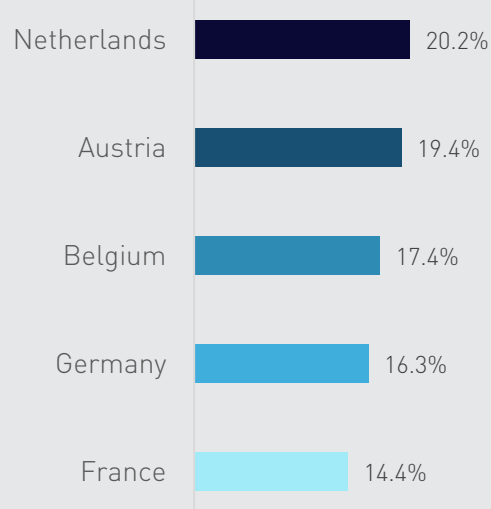
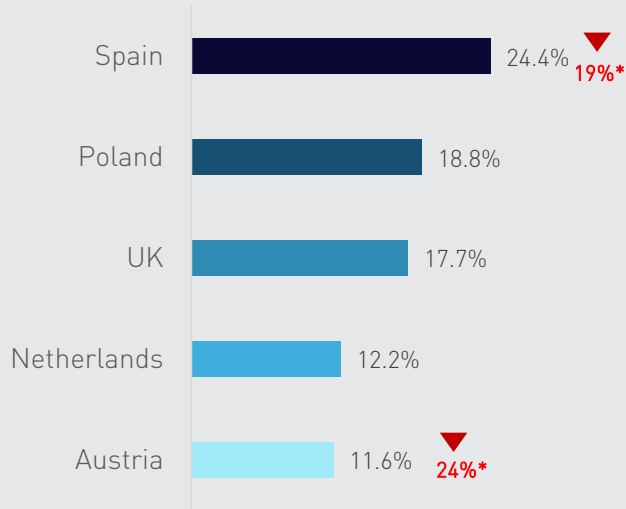
City Break



Nature & Outdoors



Culture & Heritage



* % changes vs previous survey period

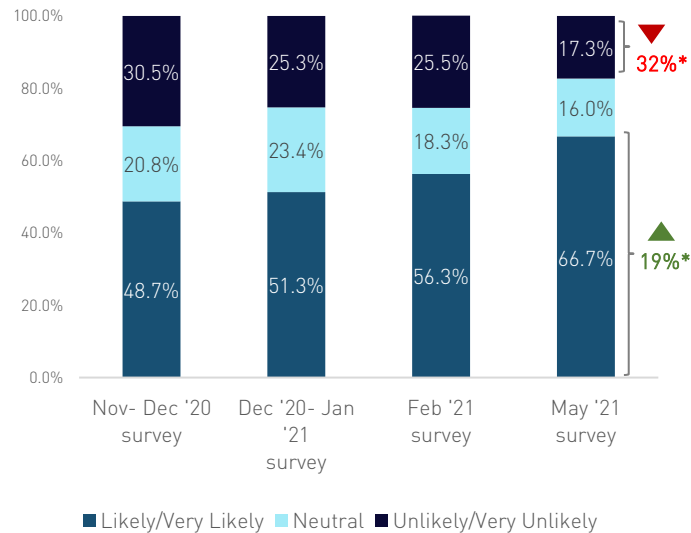
How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 24.4% of respondents from Spain are most likely to undertake a city break trip

GERMANY

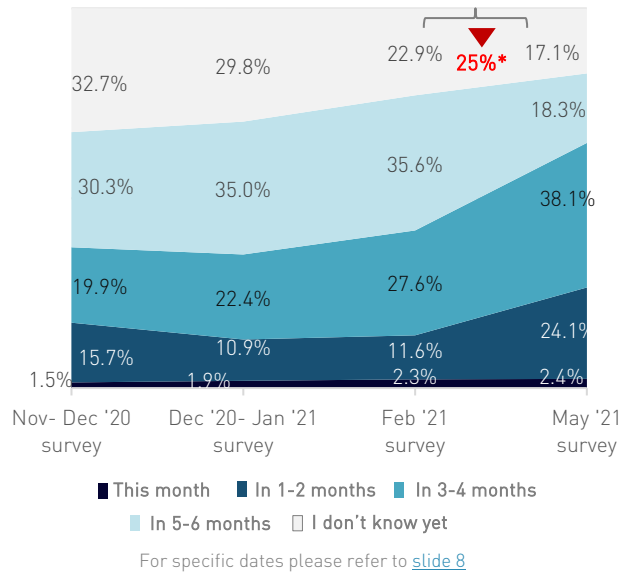
Germans' travel intentions peak, as 2 in 3 plan to travel in the next 6 months, mostly during August and September



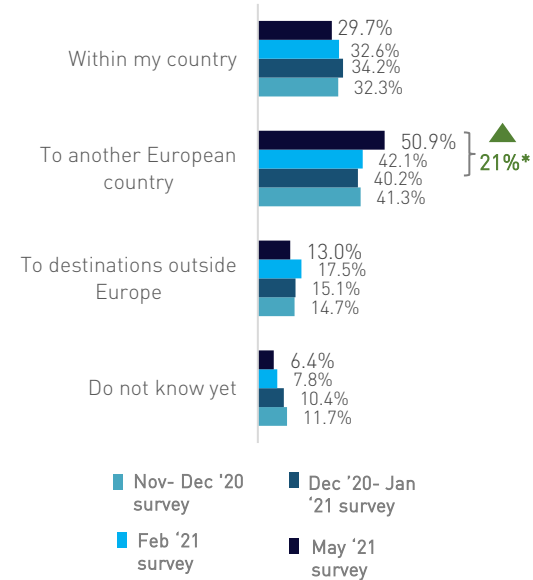
Willingness to travel in the next 6 months



When will Germans travel?



Where will Germans travel within the next 6 months?



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?

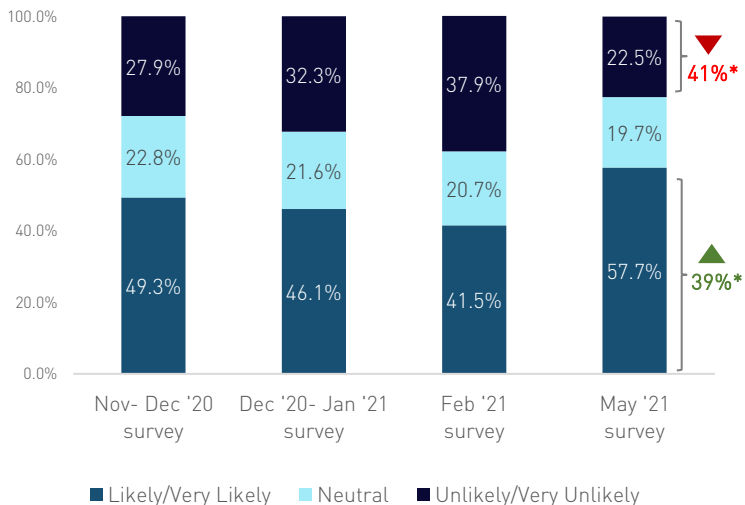
Q14. Where do you plan to travel in the next 6 months?

UNITED KINGDOM

While rising by 39%, Britons' travel intentions are still the lowest, compared to other nations surveyed, in response to changes in travel restrictions

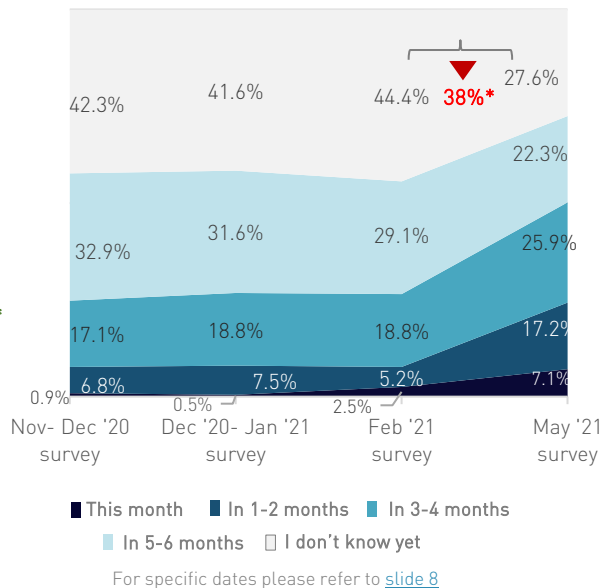


Willingness to travel in the next 6 months



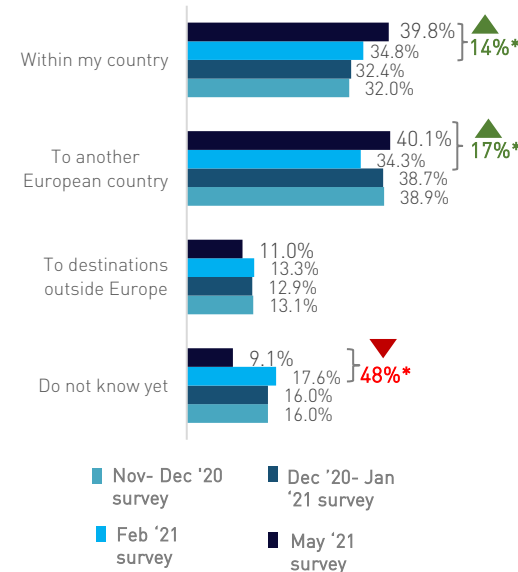
Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

When will Britons travel?



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

Where will Britons travel within the next 6 months?



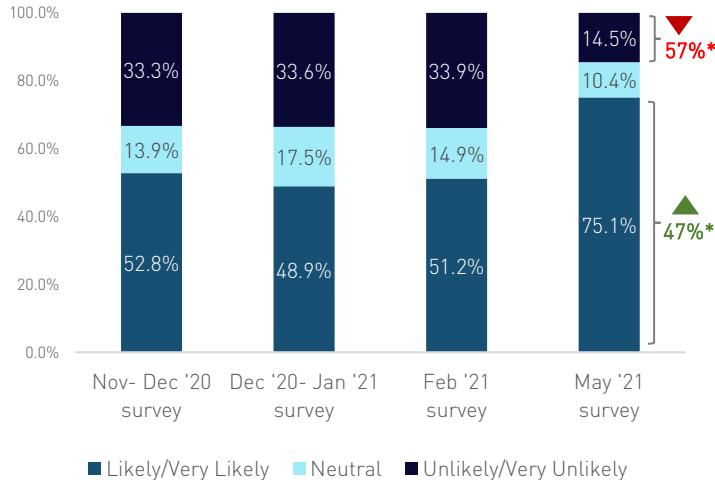
Q14. Where do you plan to travel in the next 6 months?

FRANCE

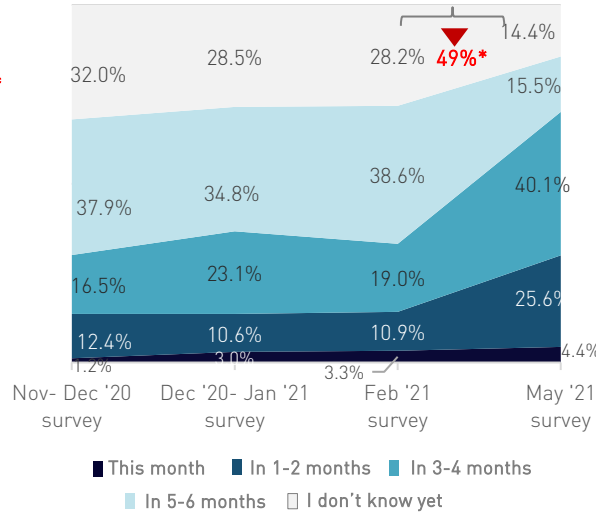
40% of French travellers are planning *les grandes vacances* in the August-September period, preferably to 'another European country'



Willingness to travel in the next 6 months

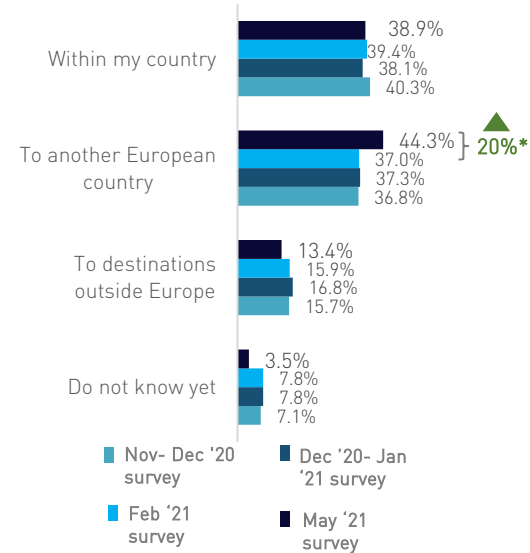


When will the French travel?



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

Where will the French travel within the next 6 months?



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?

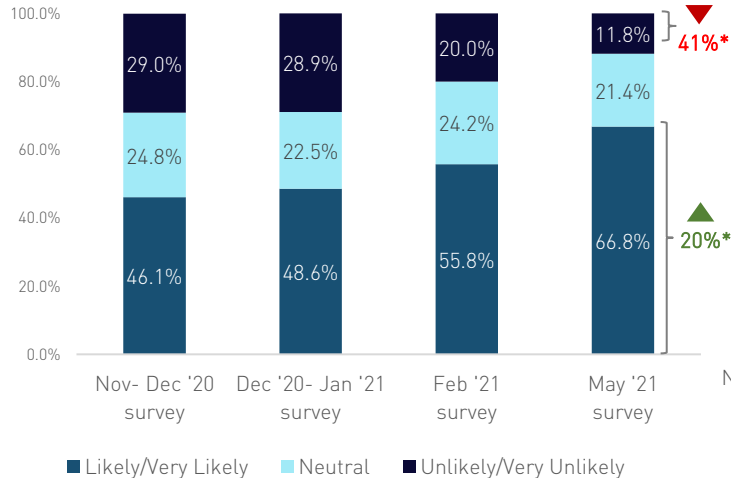
Q14. Where do you plan to travel in the next 6 months?

THE NETHERLANDS

2 in 3 Dutch holidaymakers plan to travel in the next 6 months, with 'another European country' being their most preferred destination

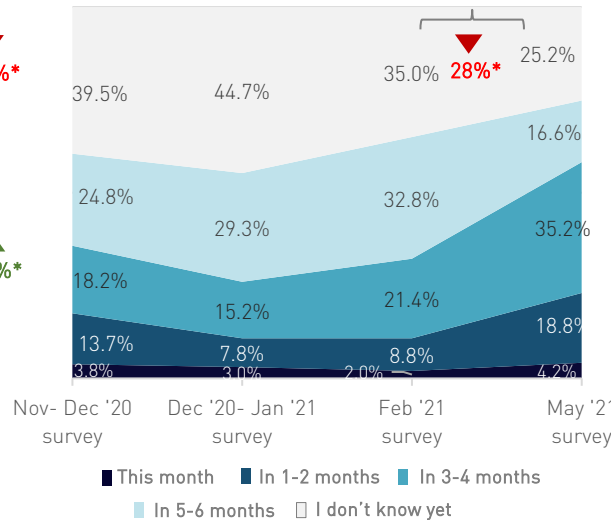


Willingness to travel in the next 6 months



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

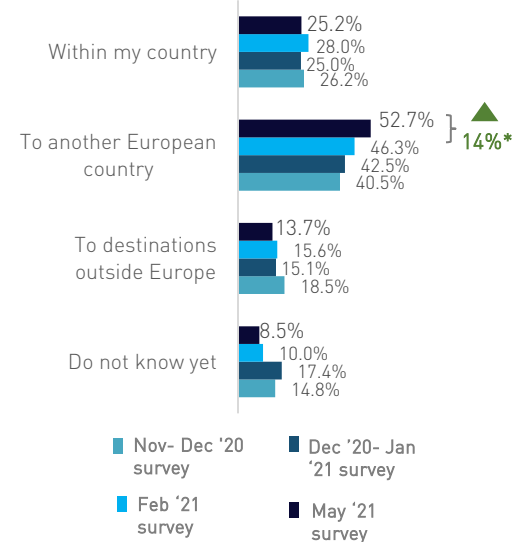
When will the Dutch travel?



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](#)

Where will the Dutch travel within the next 6 months?



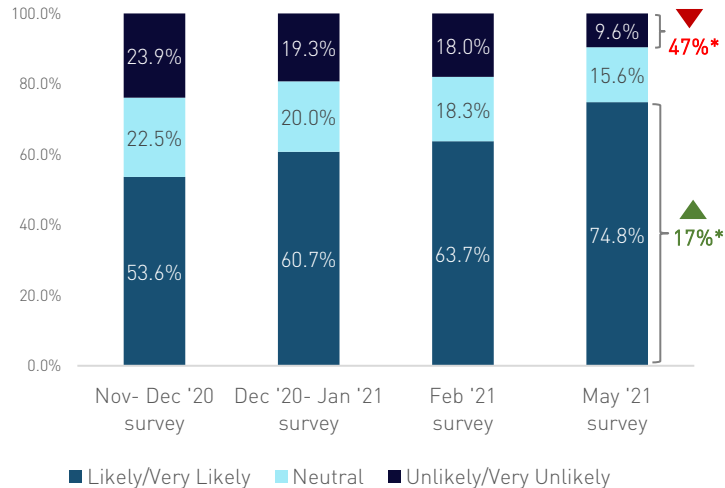
Q14. Where do you plan to travel in the next 6 months?

ITALY

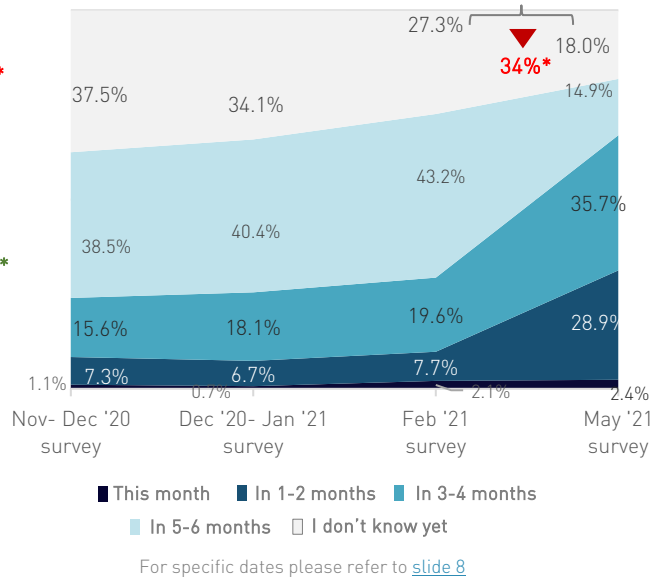
3 in 4 Italians intend to travel in the next 6 months and over half (53%) plan to enjoy their country's tourism offering- more than any other nation surveyed



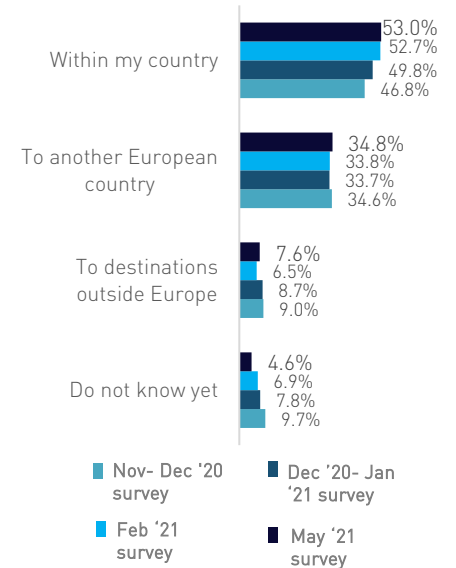
Willingness to travel in the next 6 months



When will Italians travel?



Where will Italians travel within the next 6 months?



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?

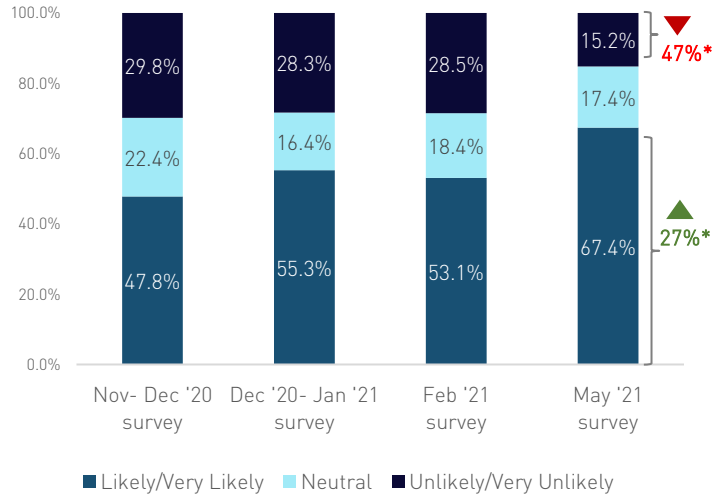
Q14. Where do you plan to travel in the next 6 months?

BELGIUM

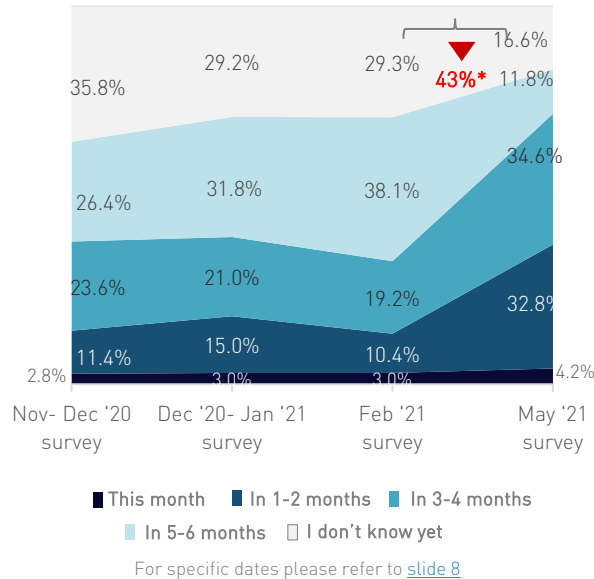
Belgians demonstrate the highest interest for intra-European trips, especially between August-September



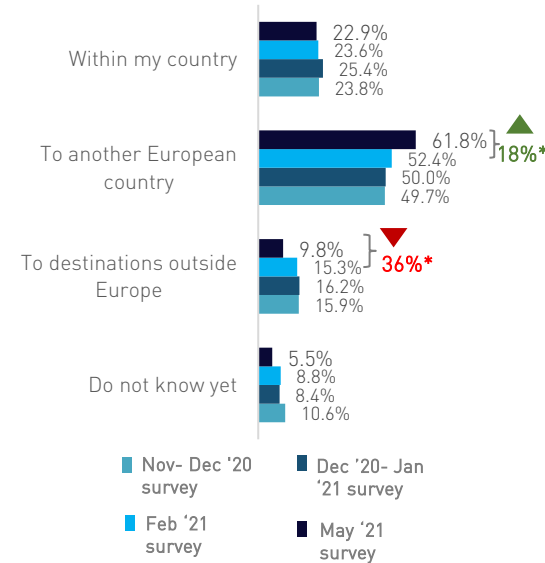
Willingness to travel in the next 6 months



When will Belgians travel?



Where will Belgians travel within the next 6 months?



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?

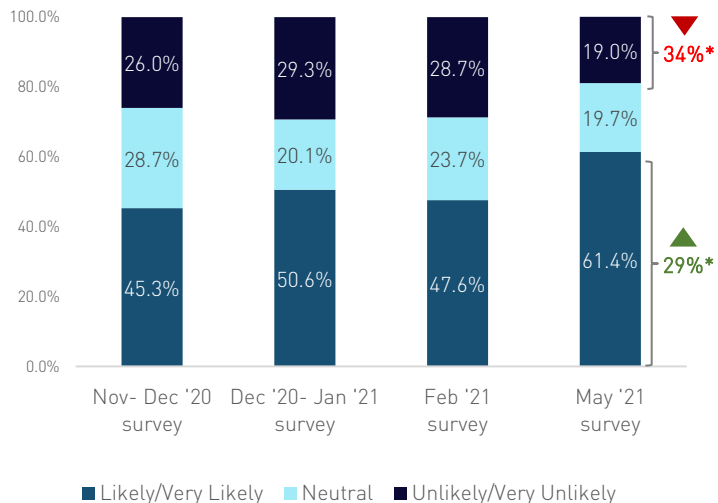
Q14. Where do you plan to travel in the next 6 months?

SWITZERLAND

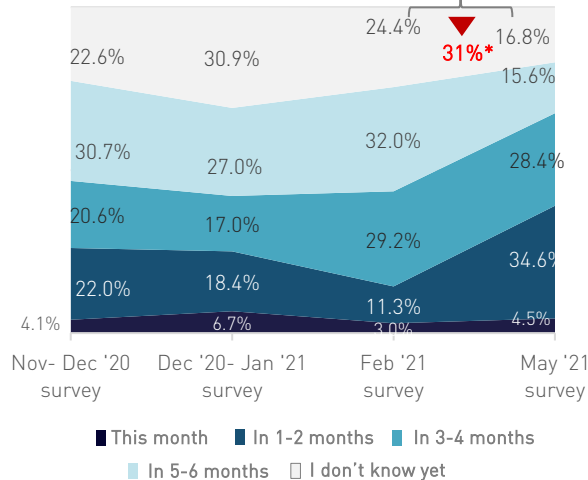
3 in 5 Swiss plan to travel in the coming months; the majority are considering a trip to another European destination



Willingness to travel in the next 6 months

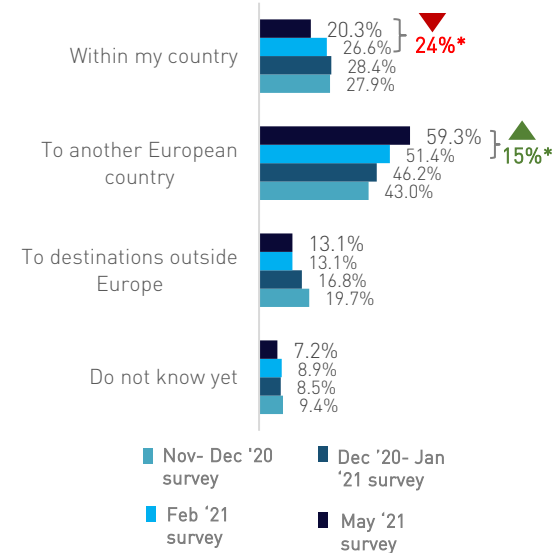


When will the Swiss travel?



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

Where will the Swiss travel within the next 6 months?



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?

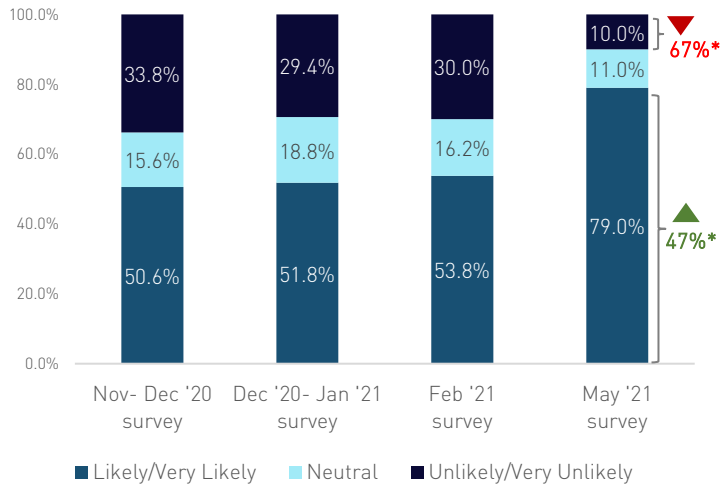
Q14. Where do you plan to travel in the next 6 months?

SPAIN

The Spanish eagerness to travel increases (+47%) along with their certainty about the timing of their next trip

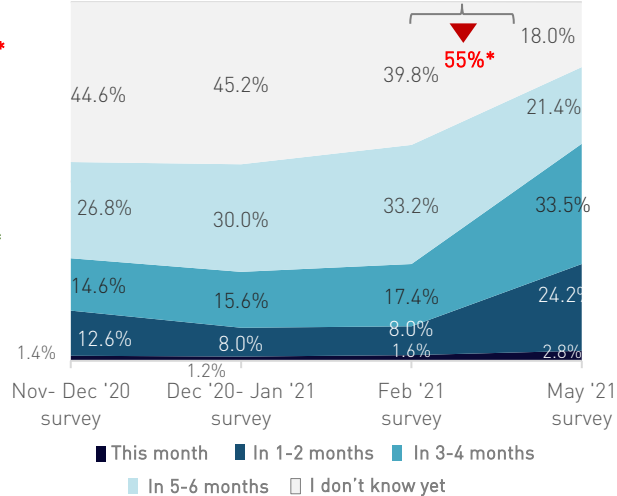


Willingness to travel in the next 6 months



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

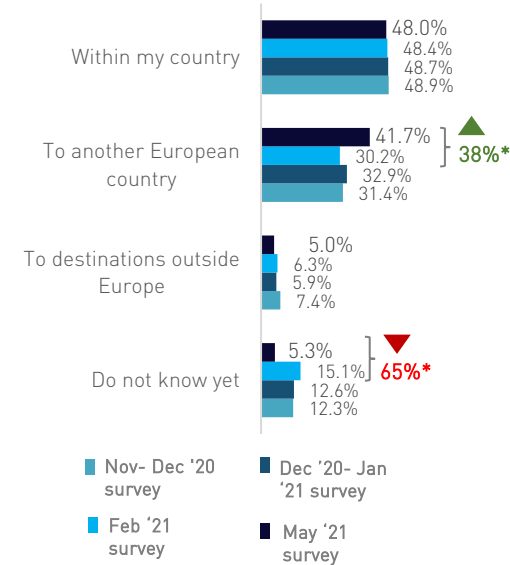
When will the Spaniards travel?



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](#)

Where will the Spaniards travel within the next 6 months?



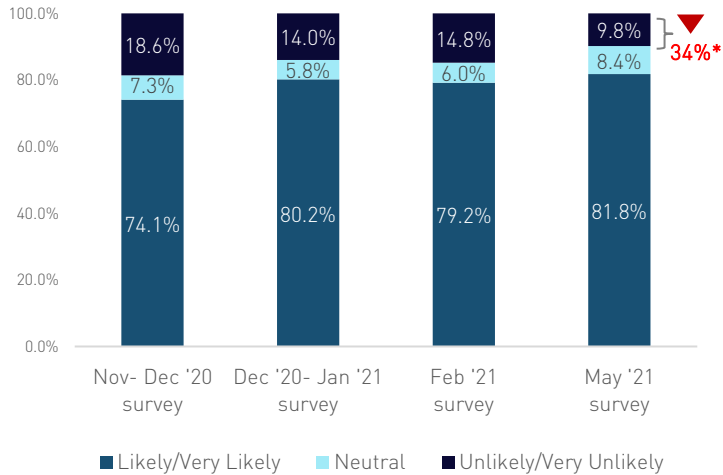
Q14. Where do you plan to travel in the next 6 months?

POLAND

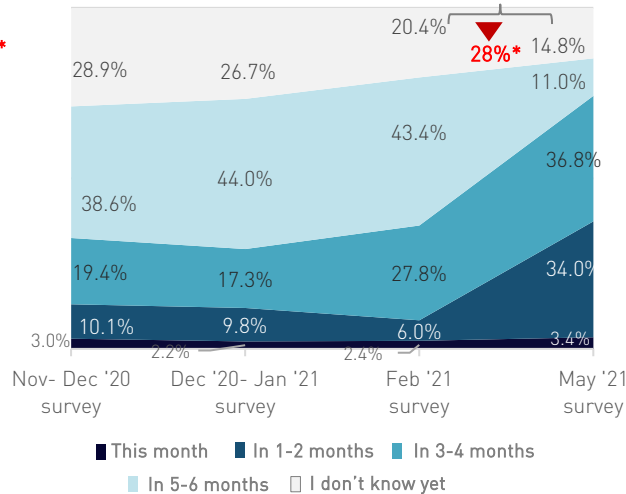
Polish travellers continue to rank the highest in travel intentions: 82% plan to travel within the next 6 months



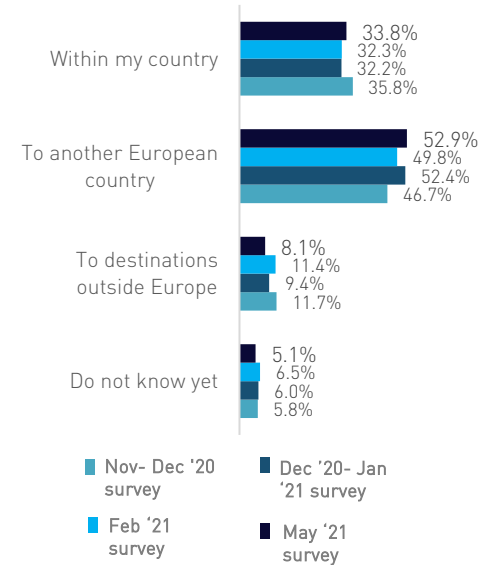
Willingness to travel in the next 6 months



When will the Polish travel?



Where will the Polish travel within the next 6 months?



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?

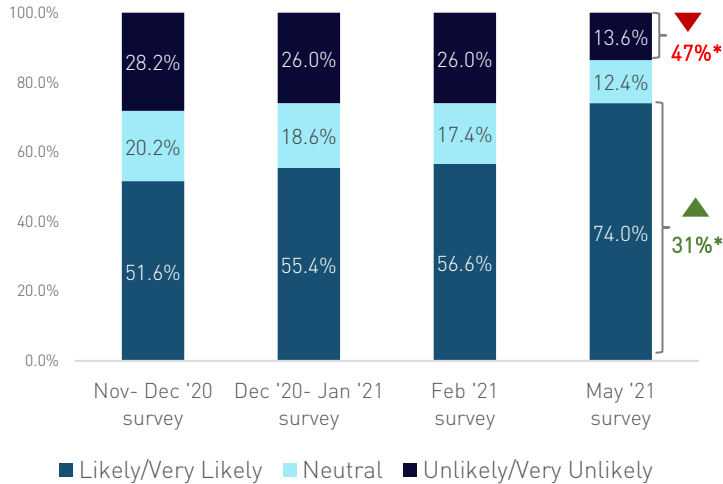
For specific dates please refer to [slide 8](#)

AUSTRIA

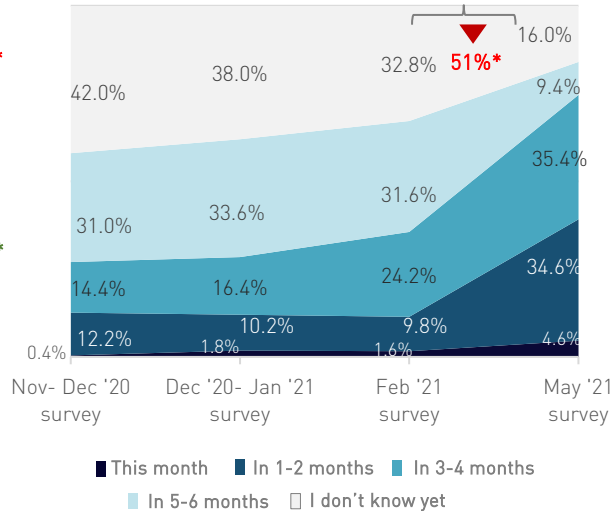
74% of Austrians will travel in the next 6 months, and more than 1 in 3 are targeting June-July



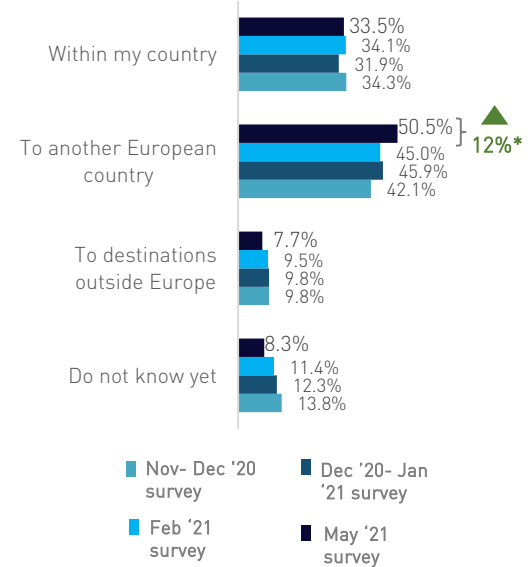
Willingness to travel in the next 6 months



When will Austrians travel?



Where will Austrians travel within the next 6 months?



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

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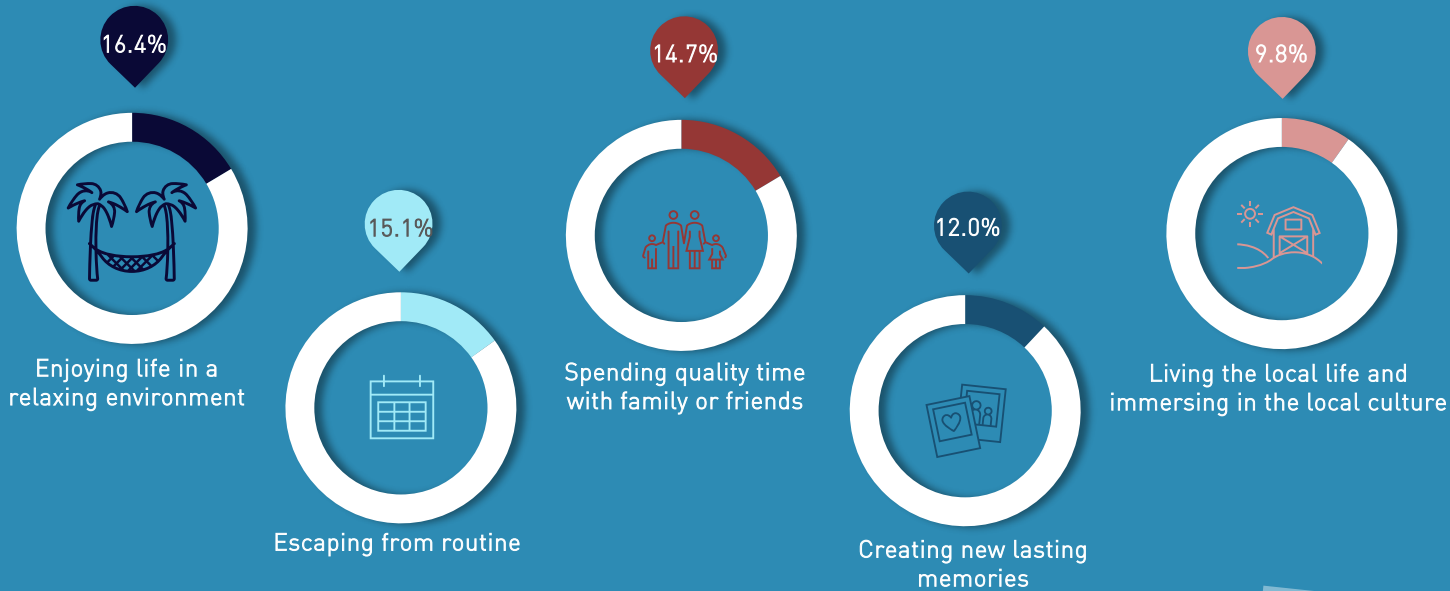
Q14. Where do you plan to travel in the next 6 months?

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

TRIP PLANNING



WHAT IS IT THAT EUROPEANS MISS THE MOST ABOUT TRAVELLING?



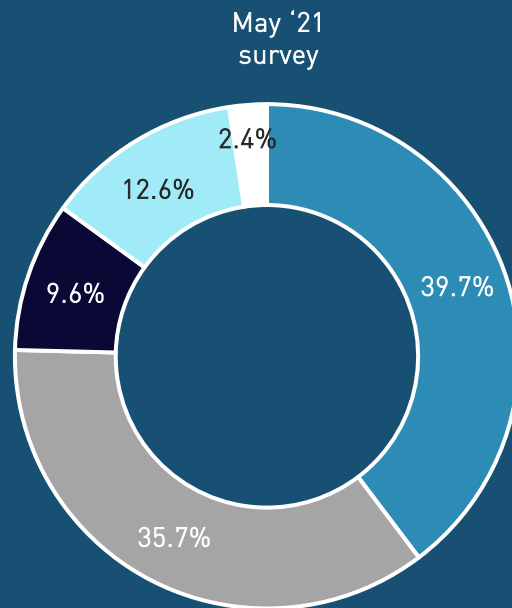
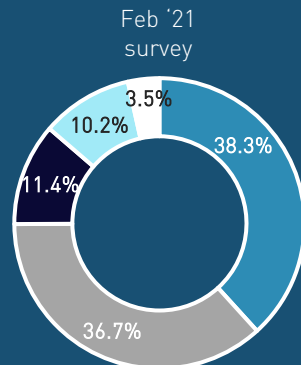
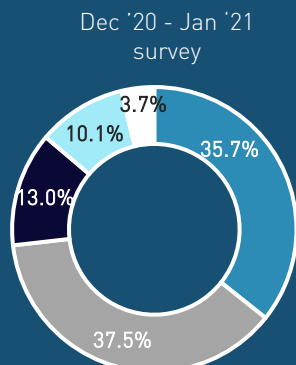
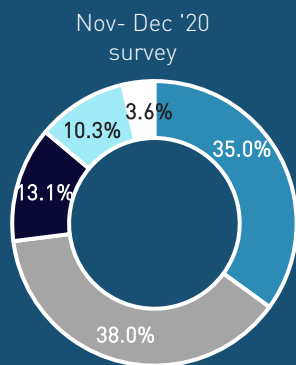
May '21 survey



The 18-24 age group is more interested in creating new memories and attending cultural events, and less interested in escaping from routine and enjoying life in a relaxing environment, compared with the overall sample

Family trips are the goal of 40% of Europeans planning to travel within the next 6 months

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



With my family



By myself



Other



With my partner



With friends



Respondents travelling with their family mostly long to spend quality time with their loved ones, while those travelling with a partner focus more on enjoyment and relaxation

* No significant changes between waves were recorded for this question

The increased preference for car travel (+23%), compared to the drop in air travel (-11%), might help to reduce travel-related CO₂ emissions

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



Spain
57.6%
▼ 12%*



France
53.5%



UK
57.0%

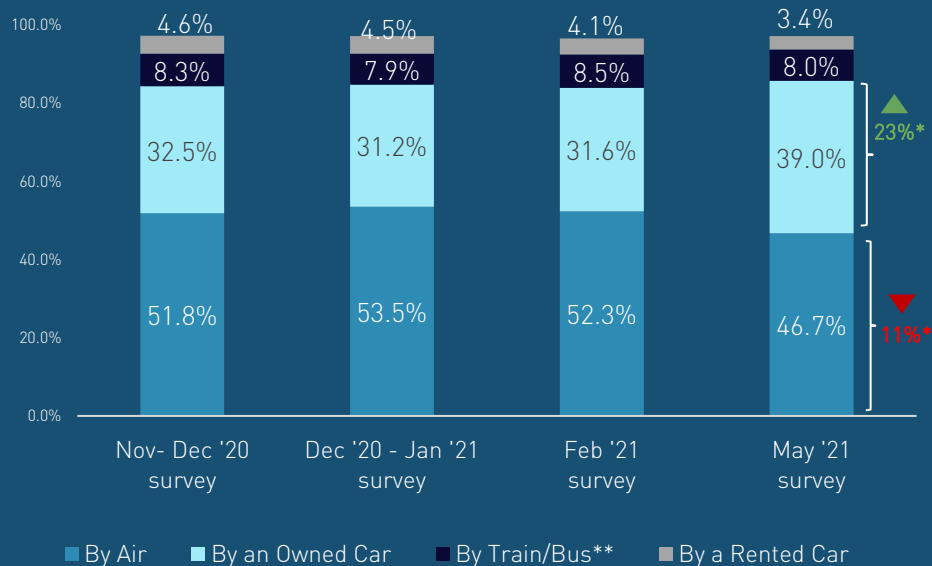


Poland
49.1%
▼ 17%*



Switzerland
55.6%
▲ 12%*

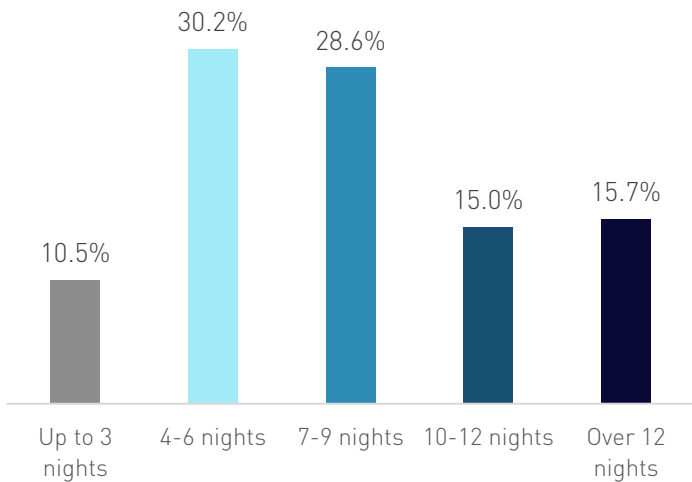
Top 4 modes of transport for respondents most likely to travel in the next 6 months



Most Europeans plan to spend between 4-9 nights on their next summer trip and invest around 500-1,500€



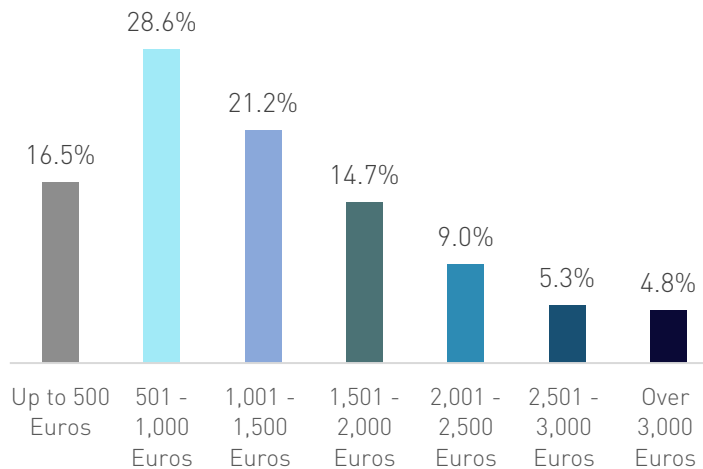
Length of next overnight trip



Q20. What would be the length of your next overnight trip?



Investing in the next overnight trip



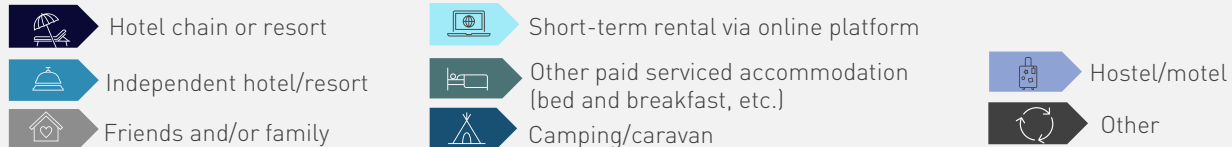
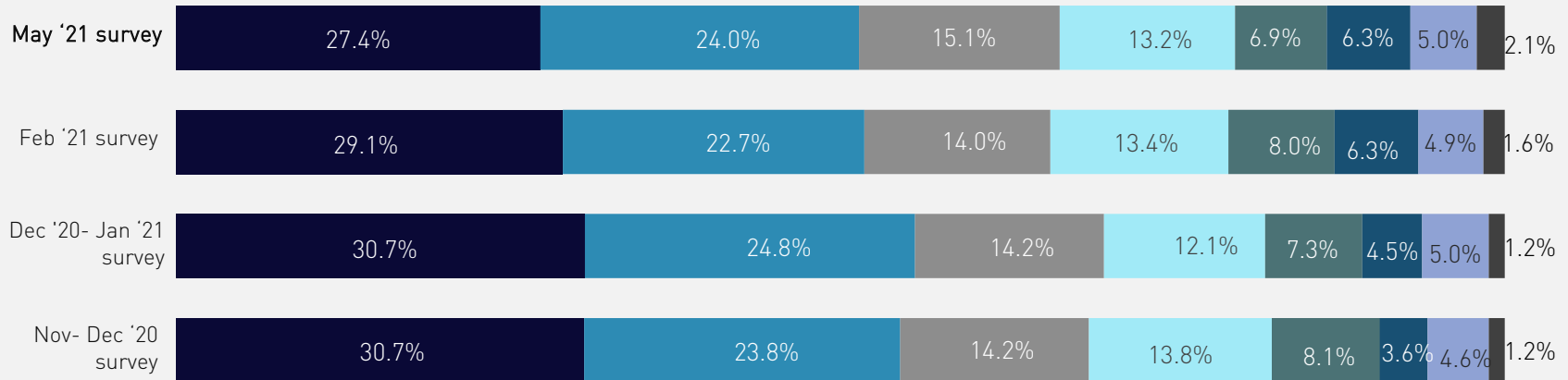
Q21. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?



58% of travellers planning a sun & beach trip will spend over 1,000€ vs. only 45% of those going on a city break

Europeans' accommodation choices remain stable: hotels are the preferred option for half of 'early-bird' travellers

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



The share of travellers planning to spend over 1,500€ is the highest among respondents staying in a **hotel chain/resort (38%)** and is 29% among those staying in **short-term rentals**

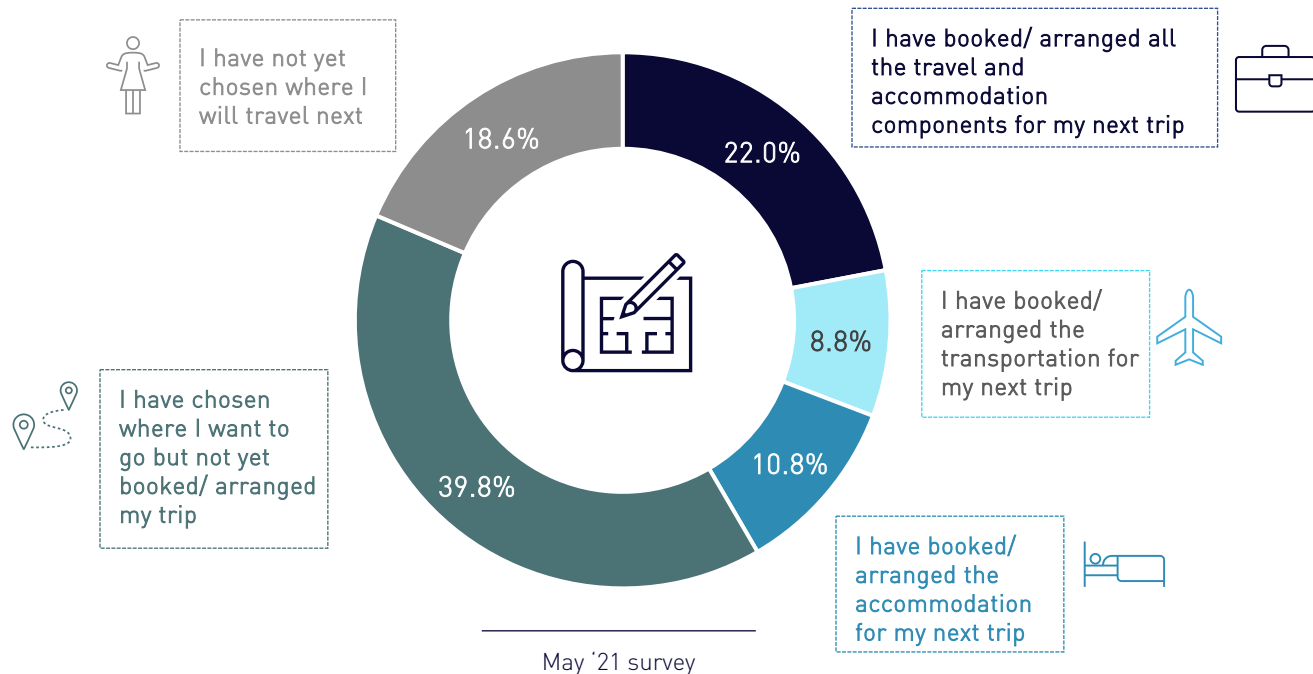
* No significant changes between waves were recorded for this question

Q17. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

No. of respondents: 4,160

42% of 'early-bird' travellers have already made some bookings for their upcoming trip, while 40% have not made any arrangements yet

Status of planning for the next trip



Travellers planning an international trip are better organised: 28% of those considering a domestic trip have not yet chosen a destination, compared to 17% of Europeans planning to visit another European country

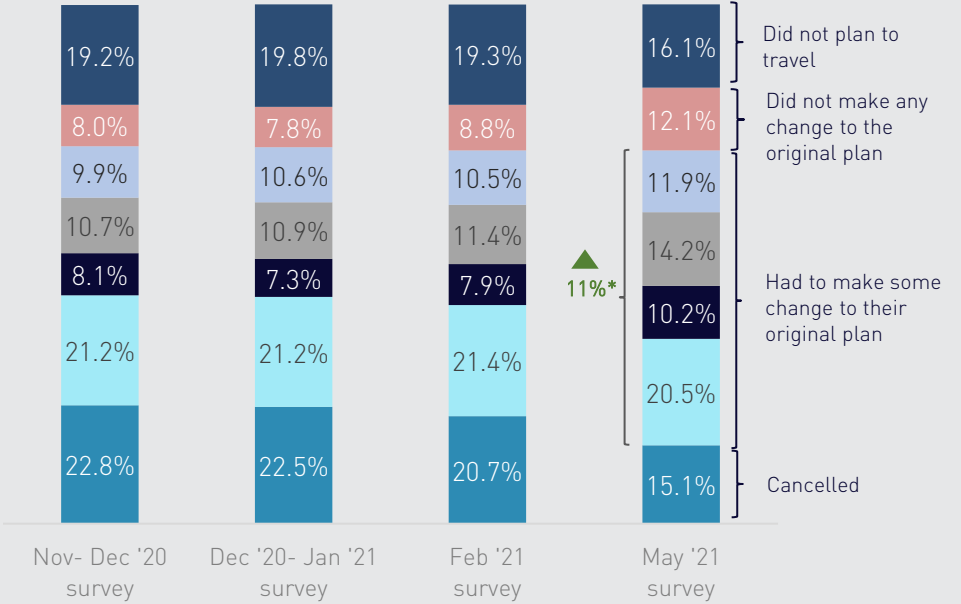
TRAVEL CONCERNS



03

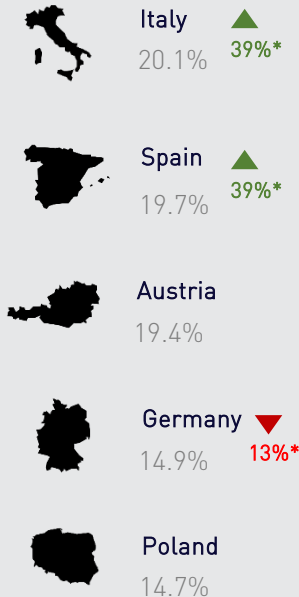
Determination to travel grows by 11%, as more respondents are planning to travel despite the need to change their plans

How has COVID-19 affected travel plans?



- 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

Top 5 markets choosing domestic over international travel

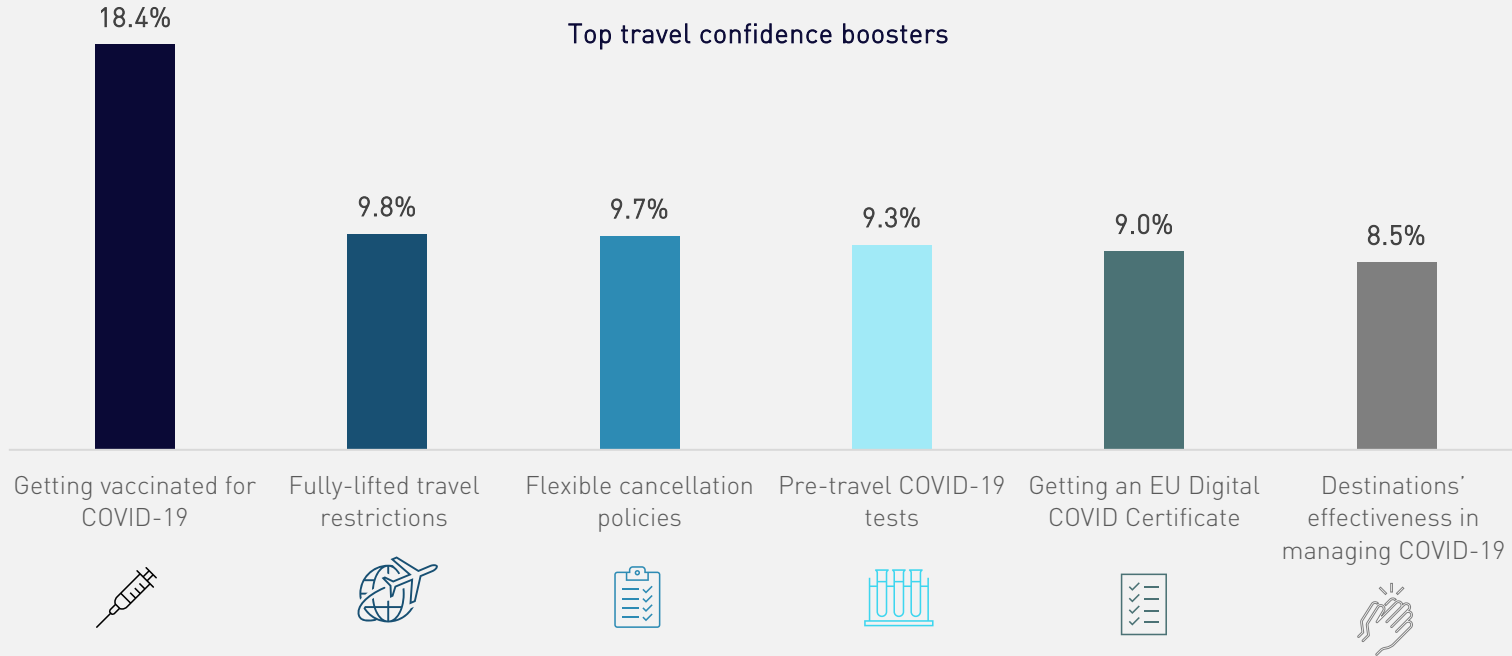


* % change vs previous survey period
No. of respondents: 5,921

By a large difference, getting vaccinated is the leading factor to restore travel confidence



The importance of getting vaccinated increases with age: from 16% in the 18-24 age group to 27% in the 55+ group

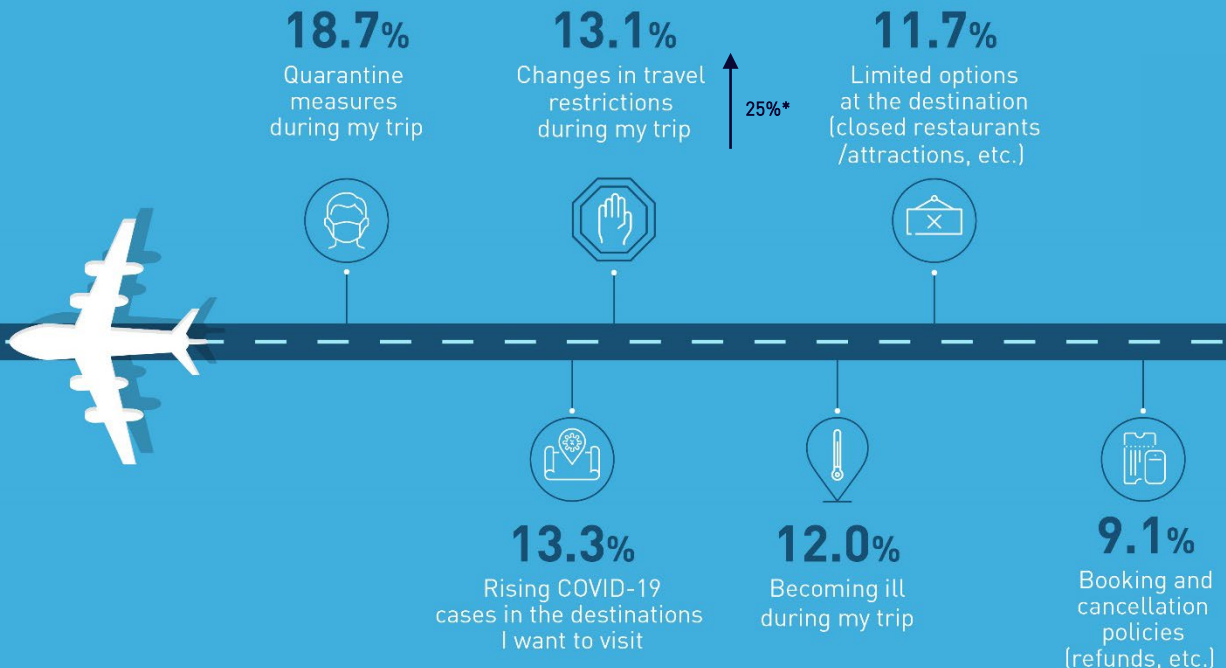


May '21 survey

TRAVEL CONCERNS OF 'EARLY-BIRD' TRAVELLERS

While quarantine measures remain respondents' top concern, this may be alleviated by the introduction of the EU Digital COVID Certificate

Leading concerns for those who are most likely to travel next**



Quarantine measures are the leading concern for travellers regardless of their destination (travel domestically/to another European country/outside of Europe)

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

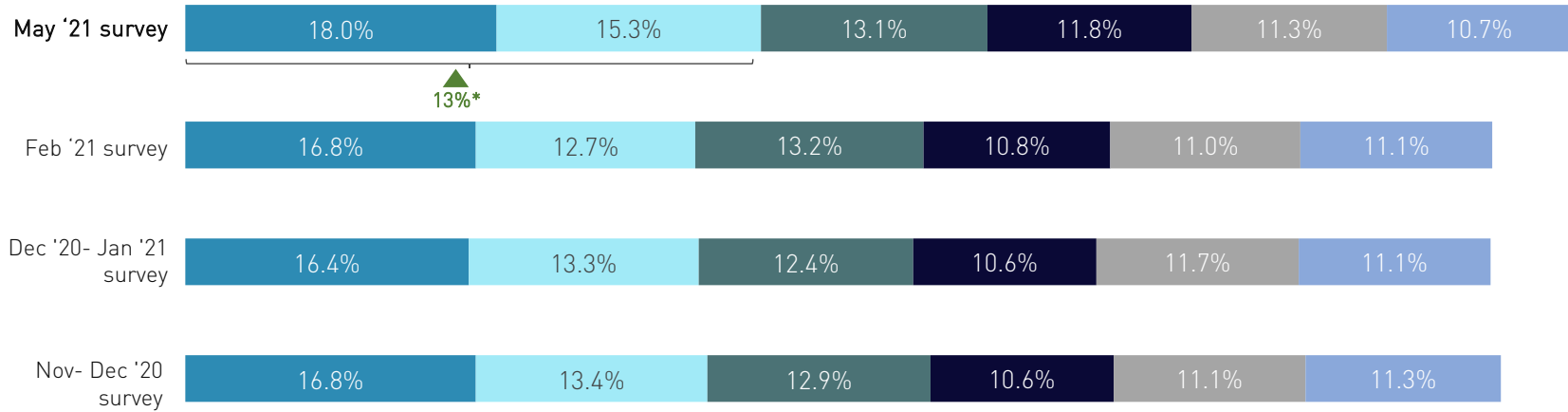
No. of respondents: 4,160

* % change vs previous survey period

**There are no significant differences between the total sample and the 'early-bird' sample of respondents

One third of Europeans are seriously concerned about the health risks associated with air / ground transportation, a 13% increase since the previous research wave

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)



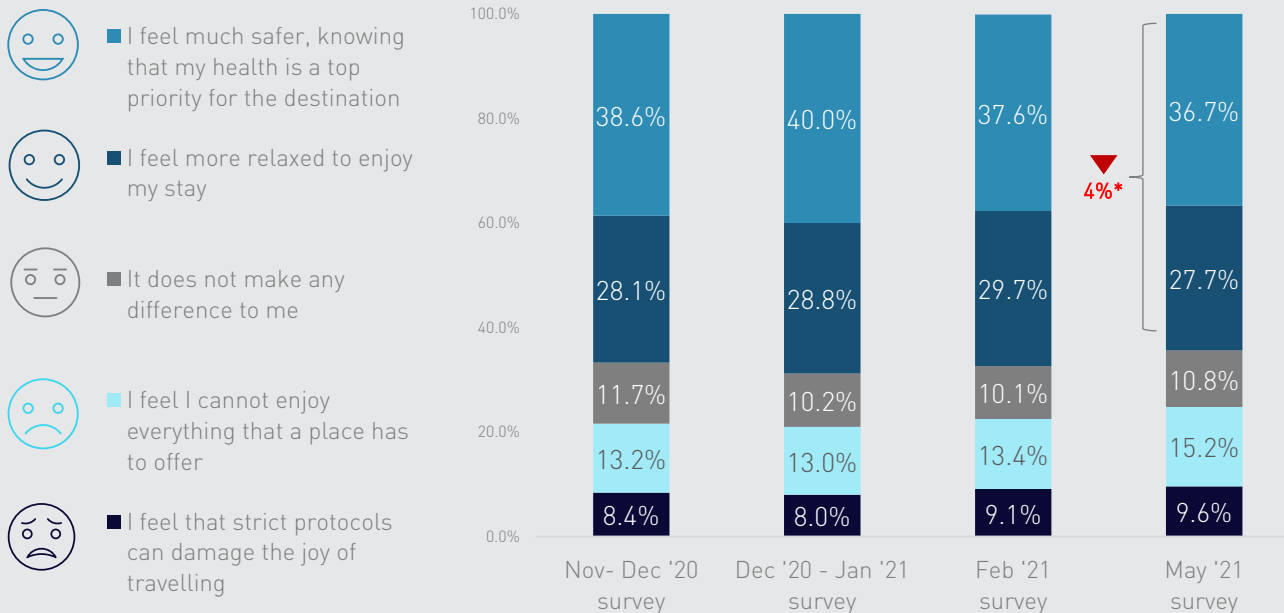
Accommodation – hotels and resorts

* % change vs previous survey period

No. of respondents: 5,921

While strict health and safety protocols remain an important factor for 64% of 'early-bird' travellers, their importance shows a slight decrease from previous research waves

Respondents' sentiment towards strict health & safety protocols



Strict health and safety protocols are of particular importance for travellers planning a culture and heritage trip, who also tend to be of an older age group

A person wearing a hat, a puffy jacket, and a backpack is walking away from the camera down a narrow, cobblestone street. They are pulling a rolling suitcase. The street is flanked by old stone buildings. The overall color scheme is a monochromatic blue-grey. The text 'METHODODOLOGICAL ANNEX' is overlaid on the left side of the image.

METHODODOLOGICAL
ANNEX

04

METHODOLOGICAL ANNEX

THE SURVEY

- Online market research. Survey participants are consumers with at least 2 overnight trips in 2019.
- Distribution/ data collection period:
 - **Wave 4:** 20 November 2020 – 3 December 2020; sample= 5,742/ **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
 - 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)
- Wave 7: 49% of respondents are male and 51% are female.
- Wave 7: Number of respondents and age group per source market:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	84	96	92	56	156	171	161	1,022
	25 - 34	135	112	74	128	129	153	106	111	81	133	1,162
	35 - 44	126	135	101	112	141	150	120	103	73	91	1,152
	45 - 54	138	167	104	103	146	168	93	83	65	65	1,132
	≥55	263	263	175	73	238	187	125	47	32	50	1,453
Total		750	750	499	500	750	750	500	500	422	500	5,921

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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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