



EGWA International  
Seminar on Greenways,  
Mobility, Leisure and  
Tourism  
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**TOURISM IN EUROPE: RECOVERY AND THE WAY FORWARD**

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EUROPEAN  
TRAVEL  
COMMISSION

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# ABOUT THE EUROPEAN TRAVEL COMMISSION (ETC)

EUROPEAN  
TRAVEL  
COMMISSION



[ETC-CORPORATE.ORG](http://ETC-CORPORATE.ORG)

## OUR MISSION

Strengthen the sustainable development of Europe as a tourist destination and increase competitiveness, through knowledge gathering and sharing amongst members and lobbying as well as by establishing a professional marketing platform for the successful promotion of member countries.

## OUR MANDATE

Non-profit organisation responsible for the promotion of Europe as a travel destination.

## OUR MEMBERS

33 National Tourism Organisations (NTOs) in Europe  
15 private organisations (Associates)





## MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 8 | 09/21

Co-funded by the  
European Union



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COMMISSION



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# MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

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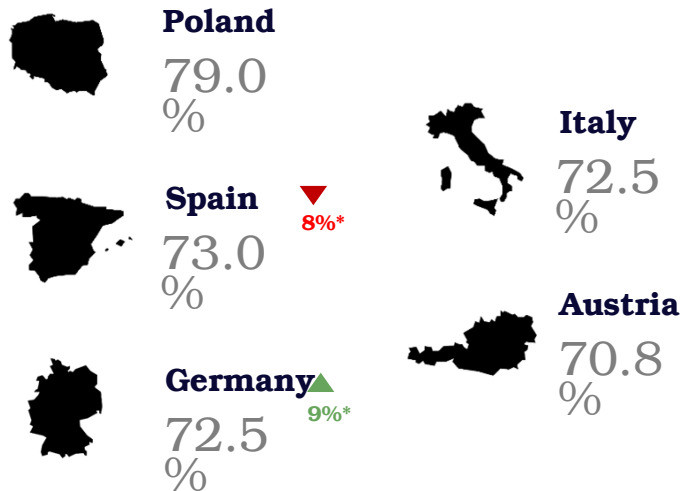
# TRAVEL INTENTIONS



Despite the Delta variant, travel intention remains high:  
68% of Europeans plan to travel within the next 6 months



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

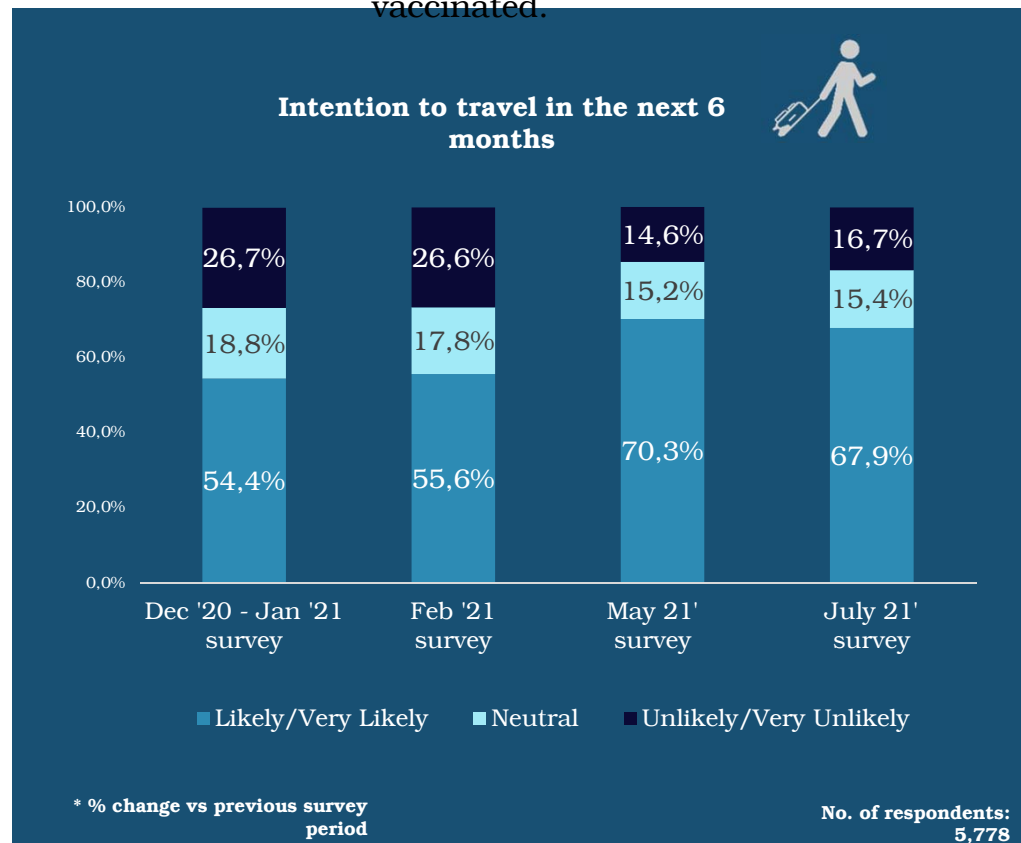


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Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

**The COVID-19 vaccine is key to tourism recovery**

1 in 2 Europeans plan to book a trip as soon as they are vaccinated.





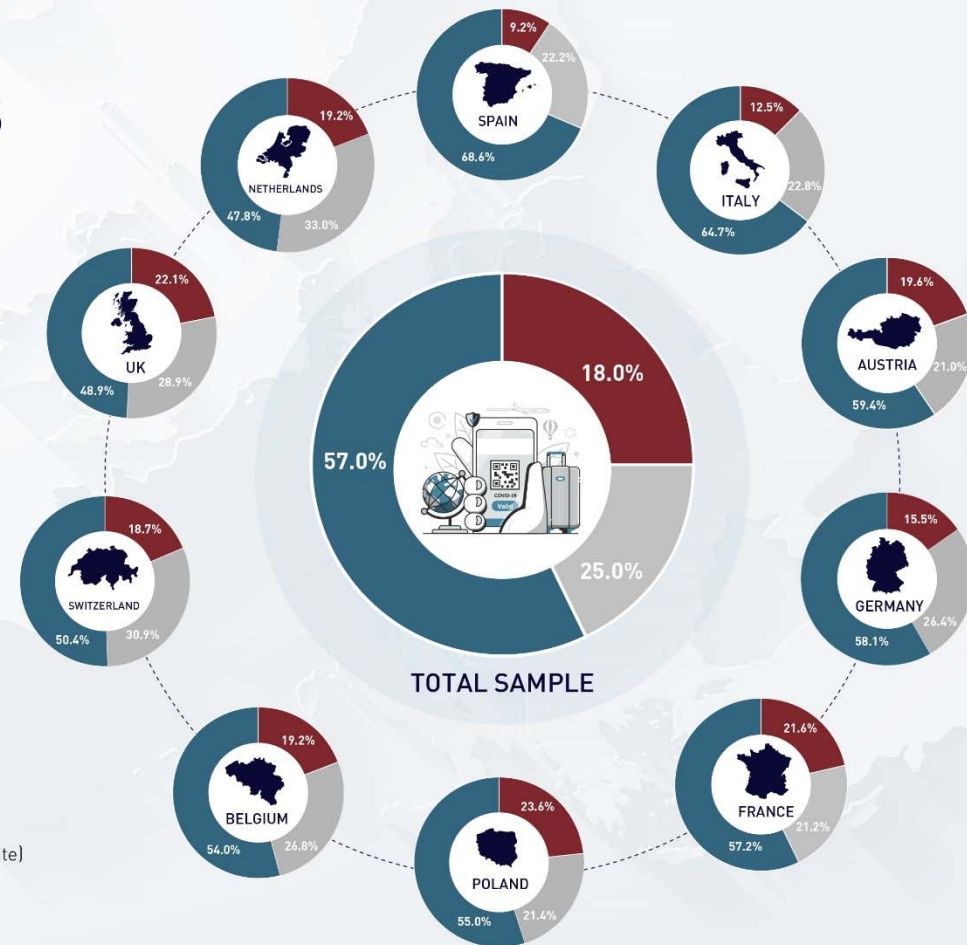
# TREND CONTINUES: OVER 50% OF EUROPEANS COUNT ON DIGITAL COVID CERTIFICATE TO EASE TRAVEL

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

- 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".

No. of respondents: 5,778



July '21 survey

## PREFERRED COUNTRIES FOR FUTURE TRIPS

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

Respondents (%) 0.3% 8.9%

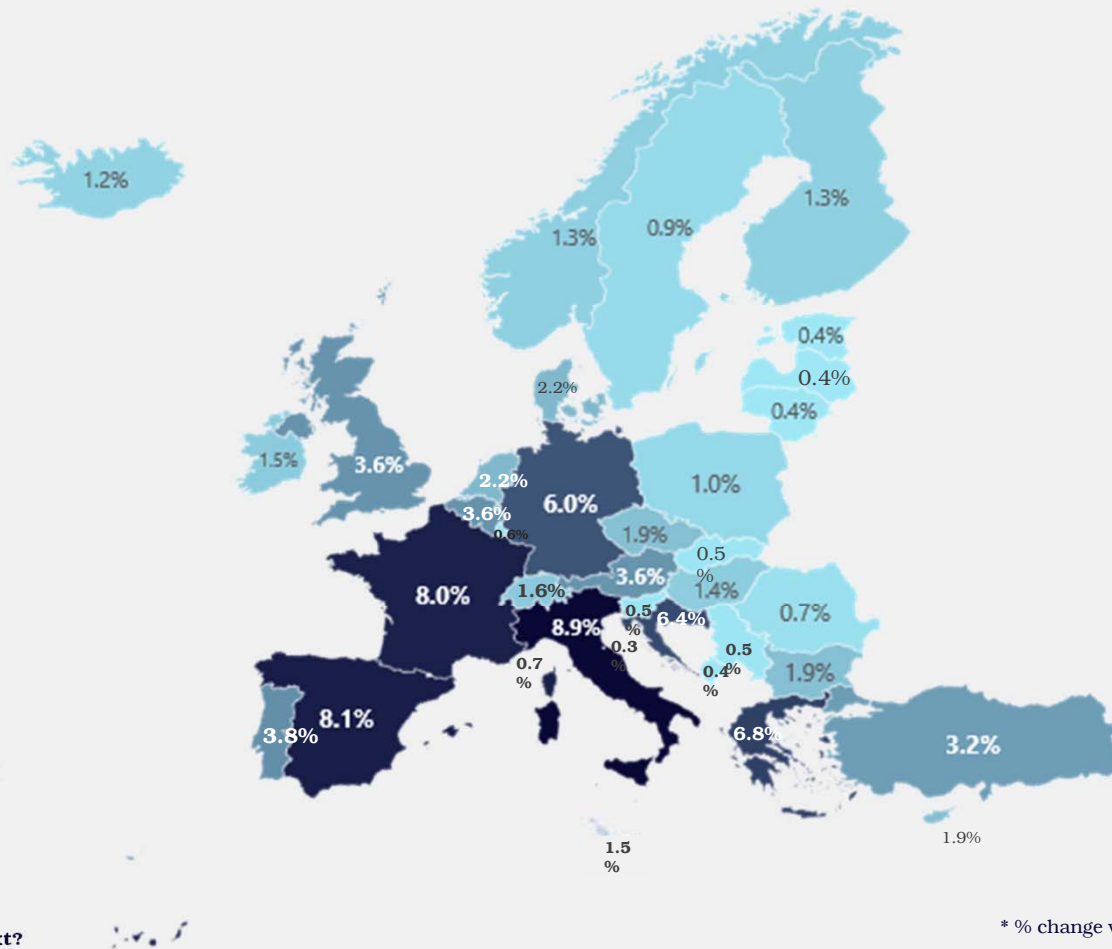
### TOP 10 COUNTRIES

Italy	8.9%
Spain	8.1% ▼ 29% *
France	8.0%
Greece	6.8%
Croatia	6.4%
Germany	6.0%
Portugal	3.8%
Belgium	3.6%
United Kingdom	3.6%
Austria	3.6%

\*Please use this map as a reference only

No. of respondents:  
4,003

8 Q15. To which country(ies) do you plan to travel next?



\* % change vs previous survey period



Sea & beach holidays are the preferred holiday for 38% of 'early-bird' travellers

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



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

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

No. of respondents:  
3,923



**Europeans are going after the sun:**

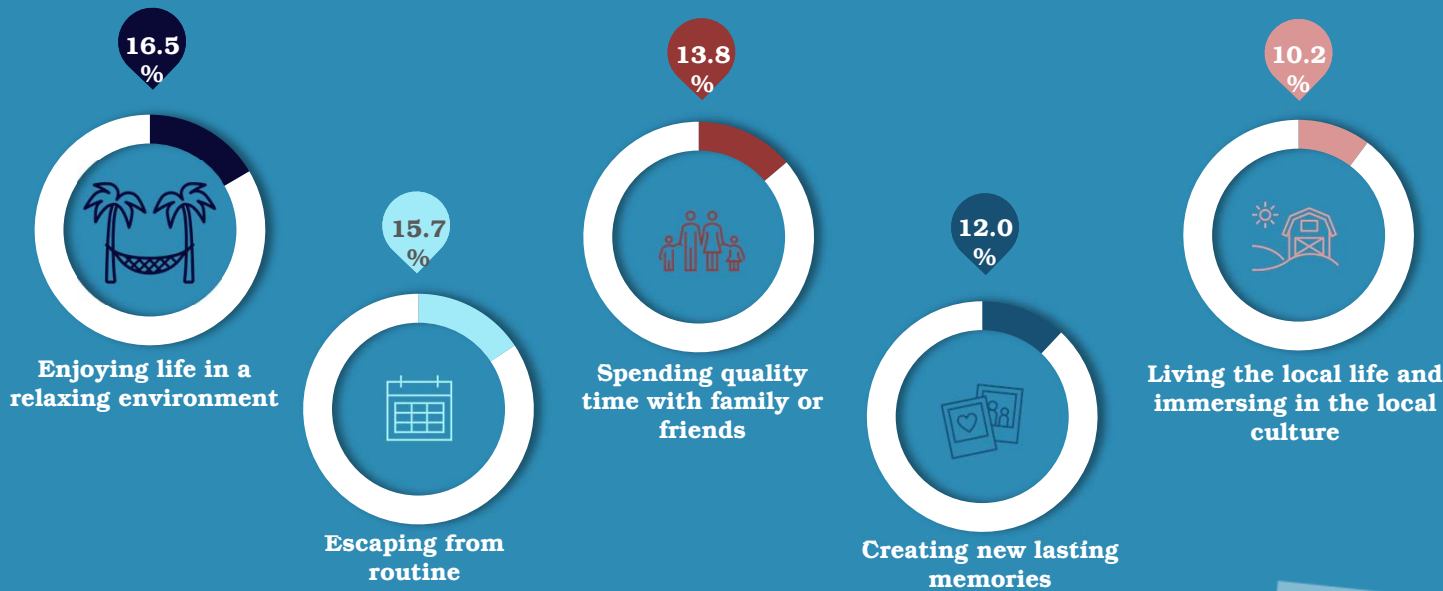
Interest in sun & beach holidays peaked in July (25%) and remains popular through Oct-Nov (20%) and Dec '21-Jan '22 (21%), creating an opportunity for off-season travel to sunny destinations

# TRIP PLANNING





## What do Europeans miss the most about travelling?



July '21 survey

Europeans **travelling with their family** want to spend quality time together, re-connecting, while those **travelling with their partner** focus on enjoying romantic leisure time and enjoying life in a **relaxing environment**

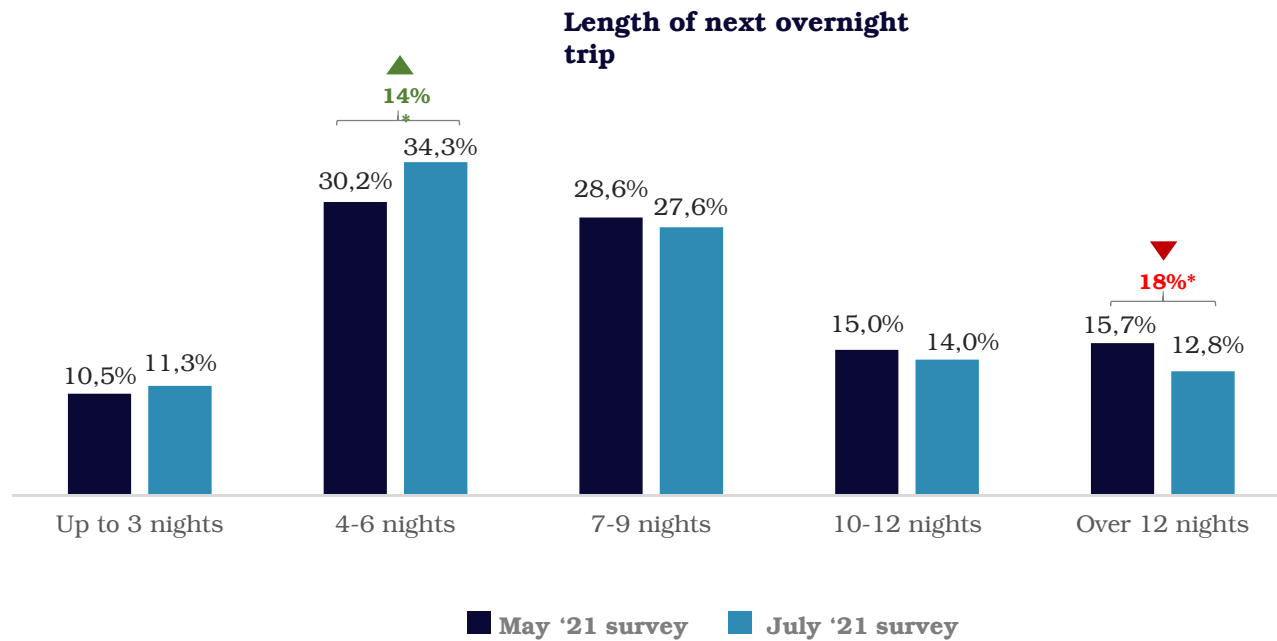
The importance of **'creating new memories'** is greater among younger respondents while **'escaping from routine'** is more important for the 45+ age groups

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

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

No. of respondents: 5,778

One third of 'travel-ready' Europeans plan 4-6-night trips (+14%), and as summer ends, stays of 12+ nights drops by 18% overall



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



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

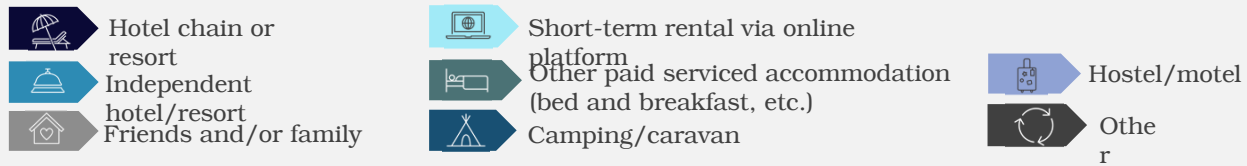
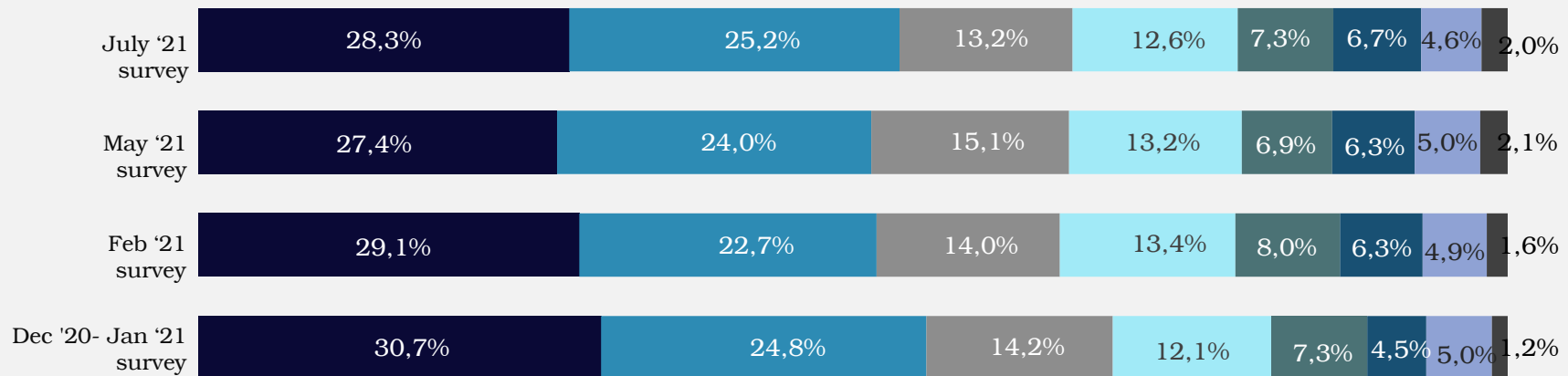
12 Q20. What would be the length of your next overnight trip?

\* % change vs previous survey period  
 \*\* UNWTO, 2018

No. of respondents:  
 3,923

Europeans show a consistent preference for staying in hotels on their next trip

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



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

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

No. of respondents: 3,923



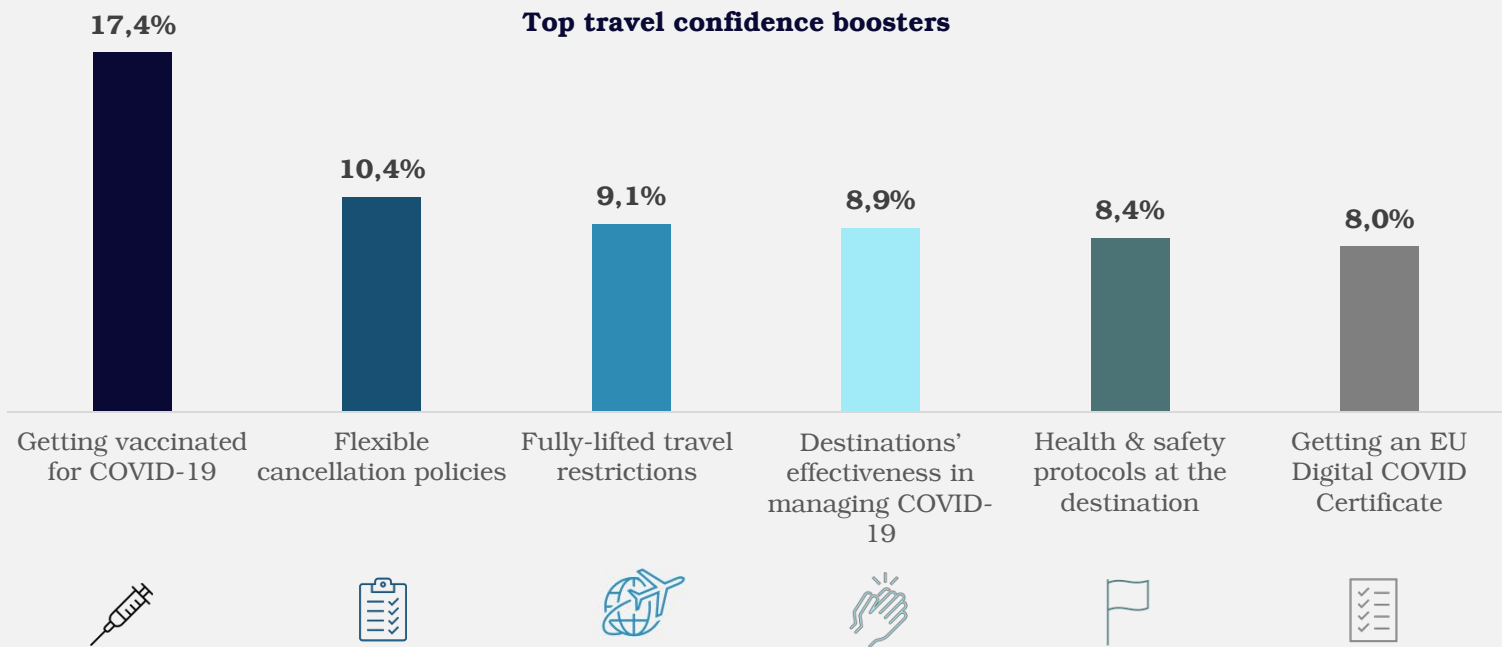


TRAVEL  
CONCERNS

OR

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

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



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

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

No. of respondents: 5,778

## 'TRAVEL-READY' EUROPEANS' CONCERNS

Quarantine measures remain travellers' greatest worry, while anxiety about rising COVID-19 cases at the destination has surged by 20%

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

**17.9%**  
Quarantine measures during my trip



**14.6%**  
Changes in travel restrictions during my trip



**9.4%**  
Limited options at the destination (closed restaurants / attractions, etc.)



**15.9%**  
Rising COVID-19 cases in the destinations I want to visit



**20%\***

**11.7%**  
Becoming ill during my trip



**8.6%**  
Booking and cancellation policies (refunds, etc.)



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

\*\*This refers to the total sample

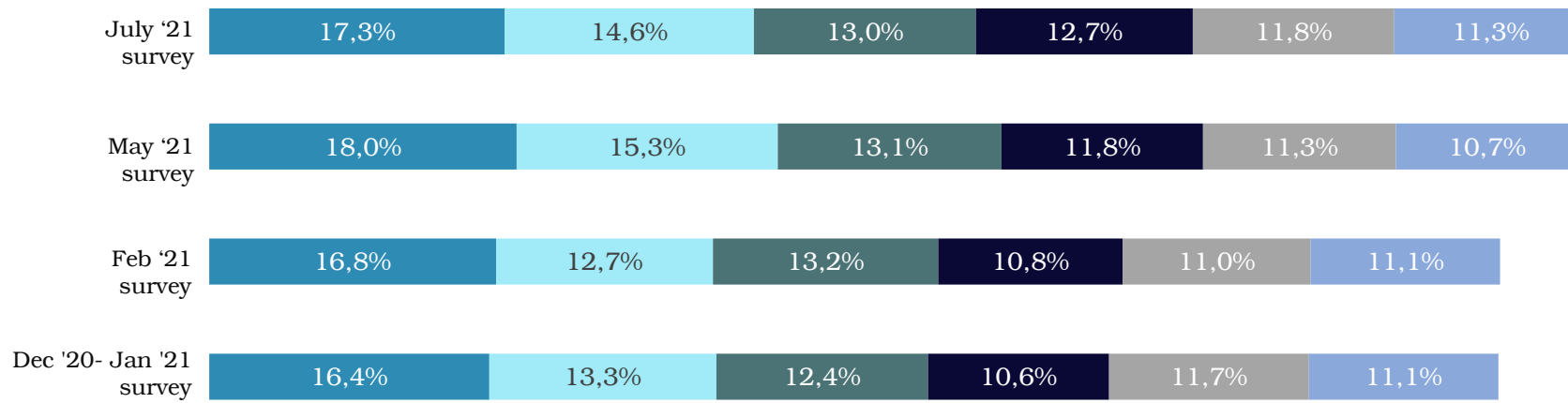
16 Q4. What currently concerns you the most about travelling within Europe?  
No. of respondents: 3,923

\* % change vs previous survey period



Healthwise, Europeans perceive using public transportation (air or ground) to be the riskiest part of their travel journey, and they are now more concerned about attractions, tours and activities

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



**Air travel**



**In destination transport (metro, bus, taxi)**



**Food & beverage**



**Attractions, tours and activities (i.e., museums, theme parks)**



**Public areas in destinations (i.e., streets, neighborhoods)**



**Accommodation - hotels and resorts**

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

17 Q5. In relation to your personal health and safety, which parts of your journey will concern you the most?

No. of respondents: 5,778

DOWNLOAD FULL PRESENTATION HERE:

<https://etc-corporate.org/reports/monitoring-sentiment-for-domestic-and-intra-european-travel-wave-8/>







## ENCOURAGING SUSTAINABLE TOURISM PRACTICES

“EVERYONE HAS A ROLE TO PLAY IN SUSTAINABLE TOURISM”

09/21

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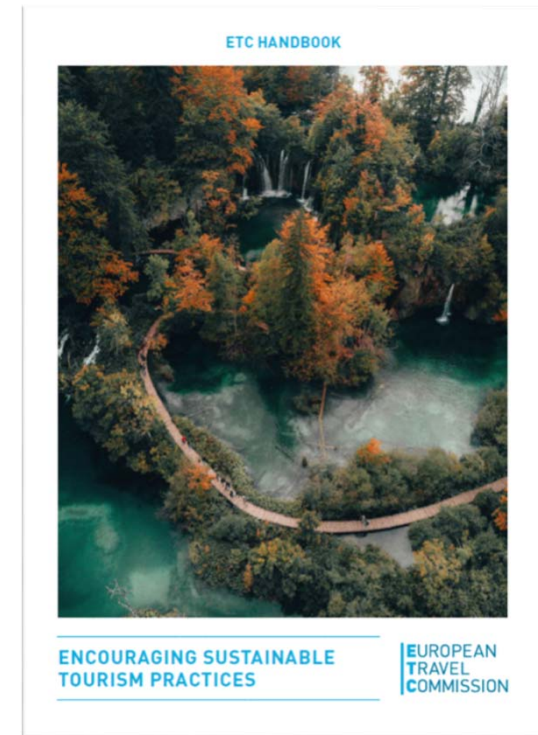


## Introduction – about the handbook

The **ETC Handbook on Encouraging Sustainable Tourism Practices** is a practical guide for European NTOs and DMOs on how to work with partners in the public and private sectors, to encourage businesses and visitors to make more sustainable choices.

The handbook covers key sustainability trends in demand and supply, together with key takeaways and recommendations.

Twenty inspiring case studies are also featured, to show how public-private cooperation can help to improve tourism's economic, socio-cultural and environmental impact.



## Consumer sentiment about travel and sustainability

- Even before the pandemic, consumer concern about sustainability was growing, particularly related to climate change
  - *A 2019 Eurobarometer survey found that 94% of respondents said that protecting the environment is important to them personally, with climate change (53%), air pollution (46%) and the growing amount of waste (46%) the most important environmental issues raised (1)*
- During 2020, the pandemic, climate change and social movements made consumers more aware of global issues and personal responsibility about addressing them

Sources:

(1) European Commission (2021) Eurobarometer 501: Attitudes of European Citizens Towards the Environment



**SNAPSHOT:  
DEMAND-DRIVEN SUSTAINABILITY TRENDS IN TOURISM**

**Key trends that demonstrate consumers' increasing interest to embrace sustainable tourism practices**



## Consumers are increasingly....

Seeking authenticity

Enjoying nature and the outdoors

Embracing 'slow travel'

Travelling closer to home

Aware of climate change

Long-distance walking and cycling

Replacing air travel with rail travel

Expecting responsible business behaviour

Supporting SMEs and 'local heroes'

Moving to plant-based diets

Off-setting the impact of their travel

Reducing waste whenever possible

## Sustainability along the tourism value chain

- Many large travel, tourism and hospitality operators now appreciate the business case for a sustainable approach, not only for the financial benefits offered but also in terms of their reputation with customers, investors and partners
- Destinations are increasingly developing strategies and actions in order to protect the assets on which they depend to attract visitors and build a successful industry for the long-term
- **However**, major efforts are still required across the public and private sectors to decarbonise travel and address the many other burdens that tourism places on the environment and communities around the world

A cyclist wearing a blue jacket and a blue helmet is riding away on a paved road that winds through a vast, rolling landscape. The terrain is covered in green and yellow grass, with several hills in the background. A small river or stream flows through the valley. The sky is a mix of blue and orange, suggesting a sunset or sunrise. The overall scene is peaceful and scenic.

## SNAPSHOT: SUPPLY-DRIVEN SUSTAINABILITY TRENDS IN TOURISM

**Key trends that demonstrate increasing interest among public and private sector organisations in embracing sustainable tourism practices**



## Public and private sector organisations in tourism are increasingly....

Developing a shared vision for destinations

Building sustainability into tourism planning

Integrating tourism into a broad-based economy

Putting communities at the heart of decision making

Applying regenerative tourism practices

Creating sustainable financing mechanisms for tourism (e.g. tourism taxes)

Setting new measures for success (e.g. value and wellbeing over volume)

Identifying and addressing climate risks

Protecting and conserving natural and cultural sites with tourism income

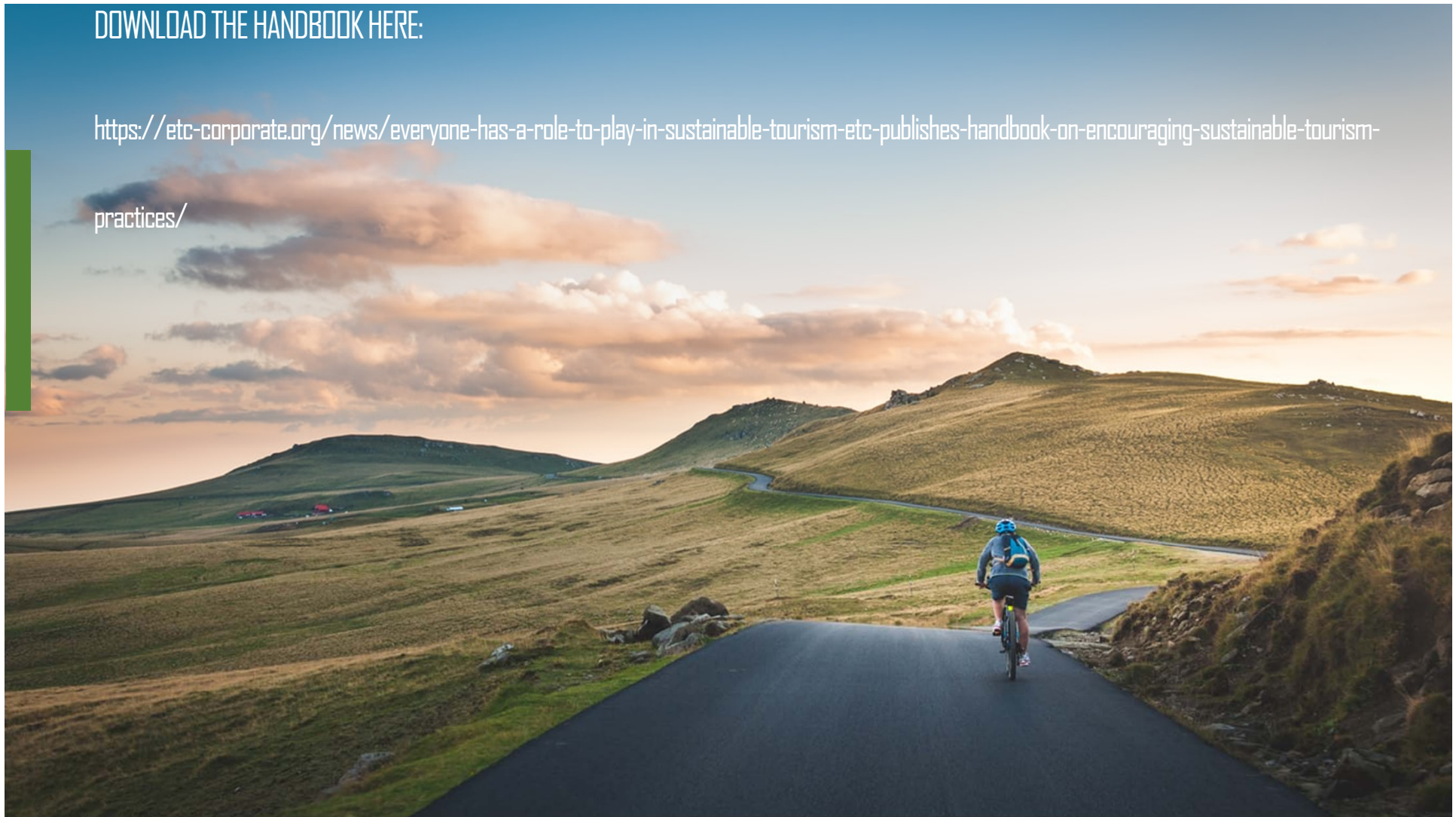
Forecasting visitor demand to manage growth

Helping travellers to make responsible choices

Building responsible and inclusive supply chains

DOWNLOAD THE HANDBOOK HERE:

<https://etc-corporate.org/news/everyone-has-a-role-to-play-in-sustainable-tourism-etc-publishes-handbook-on-encouraging-sustainable-tourism-practices/>







Thank you very much for your attention!

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