EXPLORING CONSUMER TRAVEL ATTITUDES AND EXPECTATIONS TO DRIVE TOURISM RECOVERY

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Exploring Consumer Travel Attitudes and Expectations to Drive Tourism Recovery

Summer 2022

A report produced for
the European Travel Commission
by Silverlining Research

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ETC Market Intelligence Report

EXPLORING CONSUMER TRAVEL ATTITUDES AND EXPECTATIONS TO DRIVE TOURISM RECOVERY – SUMMER 2022

Data sources: This report includes data from 36 in-depth interviews conducted with international travellers and non-travellers across seven key markets.

Cover: Sand beach aerial view directly above, vertical shot. Sunbeds, sunshades and water sports equipment, people swimming and taking sunbath
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FOREWORD

The COVID-19 outbreak in early 2020 brought tourism's decade-long boom to a standstill. Worldwide tourism declined by 73% in 2020 compared to the previous year, while Europe saw a decline of 68% over the same period. In 2021, the European tourism economy was bouncing back from the severe impacts of the Covid-19 pandemic supported by increased vaccination rates and the EU Digital COVID Certificate, which enabled the easing of travel restrictions and the reopening of tourism destinations. Although such developments are cause for enthusiasm, it remains important to consider the lingering risks of new Covid-19 variants emerging and the possibility of travel restrictions being reimposed. Inflationary pressures on household spending, and geopolitical tensions also continue to hold back the complete recovery of the tourism sector.

The whirlwind of the pandemic has changed people's lives and relationships in many ways, including their attitudes and behaviour towards travel. Additionally, research has demonstrated that these attitudes can be volatile and will continue to evolve, in line with the development of the pandemic and other factors such as digital advances, the health of the economy, or geopolitical conflicts as seen with the Russia-Ukraine crisis.

The tourism recovery path therefore requires constant research, monitoring and analysis of consumers in order to identify, in a timely manner, trends and behavioural changes relating to travel. Such analysis will not only support better strategic decision-making and planning, but will also allow destinations to anticipate consumer trends to provide higher quality visitor experiences, and build a more resilient and sustainable tourism ecosystem.

To this end, the European Travel Commission (ETC) launched the *Study on consumer Travel Attitudes and Expectations*. This report comprises the first of a two-phase study aimed at providing NTOs and DMOs with a better understanding of consumer experiences during the COVID-19 pandemic; the effect of the COVID-19 pandemic on travel; their attitudes towards travel to European destinations; and their travel expectations for the summer of 2022. ETC trusts that this report will provide guidance to its member countries in administering the necessary intelligence to prepare for the summer 2022 tourism season and beyond, ensuring conducive paths to the recovery of the tourism industry.

Luís Araújo

President, European Travel Commission (ETC)

ACKNOWLEDGEMENTS

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INTRODUCTION

This report is the first of two reports made on behalf of the European Travel Commission (ETC) by Silverlining Research on exploring consumer travel attitudes and expectations to drive tourism recovery. The topics to be explored throughout the overall study are:

- **Knowledge on behavioural trends:** Achieve a better understanding of consumer travel attitudes and behaviours driven by the COVID-19 pandemic and to identify long-lasting trends and those that will most likely fade away.

- **Understanding the market:** Identify and provide an overview of the gaps and opportunities in European tourism products and services offered during the pandemic to optimise consumer travel experiences in the short-term.

- **Anticipate travel behaviour:** Examine consumer travel expectations (about travel to and within Europe) for the year 2022 to provide tourism destinations with the necessary insights to adapt their offering to the needs and expectations of potential travellers.

- **Travel outlook:** Provide insights into consumer travel expectations following the summer period in 2022 and beyond (2023).

This report includes the results of the first phase of the study. The results will be explored in four sections, with the main themes being *1) travel experiences during the COVID-19 pandemic*; *2) the effect of the COVID-19 pandemic on travel behaviour*; *3) attitudes towards travel to European destinations*; and *4) travel expectations for the 2022 summer season*.

Throughout the report, there will be references to quantitative studies conducted by the European Travel Commission, e.g. Monitoring Sentiment for Domestic and Intra-European Travel (MSIET)[1], and other relevant research to support the qualitative findings of this study.

METHODOLOGY

The results of this interim report are based on a total of 36 in-depth interviews varying between 25-45 minutes in length. The interviews were conducted over the period March 28 to April 27 2022, in the following countries:

- **European markets**: France, Germany, Italy, the Netherlands, and the United Kingdom.

- **Extra-European markets**: Australia and the United States.

Additionally, the in-depth interviews are also distributed between three target segments based on thematic tourism experiences[2]:

- **Segment 1**: Creative Cities.

- **Segment 2**: History and Ancestry.

- **Segment 3**: Nature and the Outdoors.

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[1] The latest release can be found here: https://etc-corporate.org/reports/monitoring-sentiment-for-domestic-and-intra-european-travel-wave-11/
[2] For a more in-depth overview of the profiles of each segment, see Appendix A.

To place the potential interviewees into their respective segments, each respondent was required to answer a screener survey prior to being recruited for the interview. An overview of the number of interviewees in each country and segment is presented in the following table.

Table 1: Distribution of interviewees between countries and segments

Country	Segment	Number of interviewees	Total
France	Creative Cities	2	6
	History and Ancestry	2	
	Nature and the Outdoors	2	
Germany	Creative Cities	2	6
	History and Ancestry	2	
	Nature and the Outdoors	2	
Italy	Creative Cities	2	4
	History and Ancestry	2	
	Nature and the Outdoors	0	
The Netherlands	Creative Cities	2	4
	History and Ancestry	0	
	Nature and the Outdoors	2	
The United Kingdom	Creative Cities	2	6
	History and Ancestry	2	
	Nature and the Outdoors	2	
The United States	Creative Cities	2	6
	History and Ancestry	2	
	Nature and the Outdoors	2	
Australia	Creative Cities	0	4
	History and Ancestry	2	
	Nature and the Outdoors	2	
Total			36

For the interviewees to be placed in the Creative Cities segment, their main reason for travelling must be at least one of the two:

- **Gastronomy** (e.g. tasting local food and drink, organic food, fine dining experience, cooking classes).

- **City life** (e.g. fashion design, spotting hidden urban gems, shopping, street art, modern architecture).

To be placed in the History and Ancestry segment, the interviewee's main reason for travelling must be:

- **Exploration of cultural identity and roots** (e.g. commemoration, history and ancestry, cultural roots).

Lastly, to be placed in the Nature and the Outdoors segment, the interviewee's main reason for travelling must be at least one of the two:

- **Nature** (e.g. wild landscapes, eco-tourism, astronomy).

- **Adventure** (e.g. camping, adventurous outdoor activities, such as climbing and sky diving).

Besides belonging to one of the above segments, the interviewees had to fulfil other criteria to be eligible for an interview. The interviewees must be permanent residents of the respective country the survey is conducted in; they must be the main or joint decision-makers for holiday travel in their household; and the American and Australian interviewees must be open to considering a holiday in Europe in 2022.

Additionally, the interviewees were asked whether they had travelled abroad during the pandemic (2020 and 2021) for holiday purposes or if they decided to stay put within their own country. Interviewees who have travelled abroad during 2020 and 2021 will be referred to as "travellers", and interviewees who have not travelled abroad will be referred to as "non-international travellers". There is an even distribution between the two groups.

CHAPTER 1

TRAVEL EXPERIENCES DURING THE COVID-19 PANDEMIC
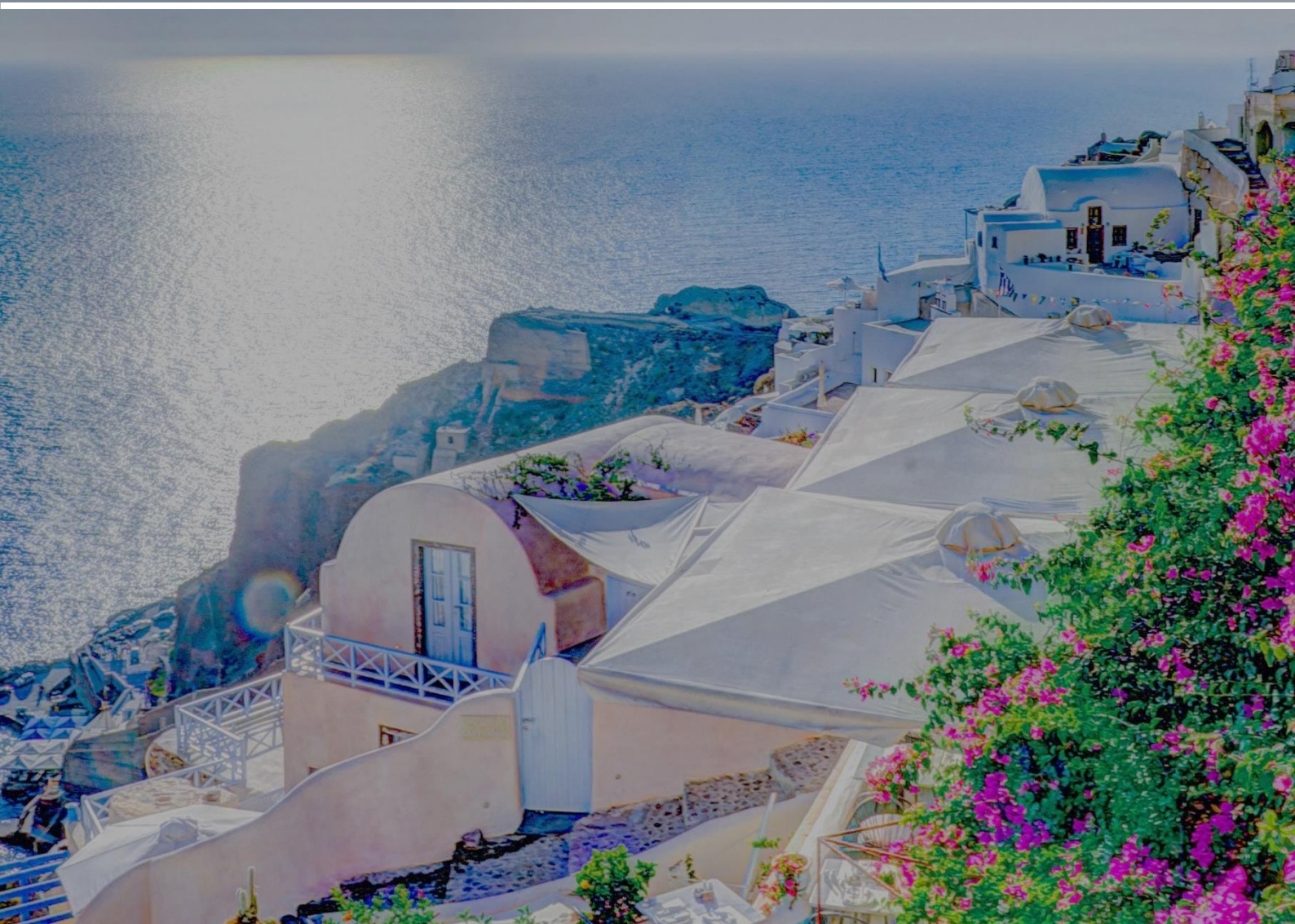
1. TRAVEL EXPERIENCES DURING THE COVID-19 PANDEMIC

MAIN FINDINGS

- The most demanded services to remain post-pandemic are flexible cancellation policies, followed by enhanced hygiene at accommodation establishments, on transportation, and in public areas at the destination.
- Tourists travelling by plane were more likely to encounter challenges (e.g. flight cancellations, required documentation, etc.) before and during their trip.
- Fear of COVID-19 and potential problems due to restrictions were the most common reasons for not travelling abroad. These were especially a hindrance for the Creative Cities segment.
- The majority of non-international travellers expect either no or only negligible challenges related to COVID-19 for the summer of 2022 and onward.

The turbulence brought by the COVID-19 pandemic has had an enormous impact on people's travel decisions. The love for travelling has been challenged by the rapidly changing restrictions, leading to more travellers staying closer to home and rediscovering the joy of exploring local areas. However, as soon as travel restrictions were lifted, the challenges brought by the pandemic did not completely stop everyone from crossing national borders and enjoying a vacation in a foreign country.

1.1 THE TRAVELLING EXPERIENCE DURING THE PANDEMIC

While most of the countries visited by the travellers[3] are in Europe, a few tourists have travelled overseas to destinations like Thailand, India, and the Caribbean. The number of countries visited during the pandemic by interviewees ranges from just a single country and up to five countries. As is normally the case, warmer countries were the most popular, i.e. Spain and Greece, which are also reflected in the 2nd wave of research on "Monitoring Sentiment for Domestic and Intra-European Travel"[4] (MSIET, November 2020)[5]. Most travellers went on a city break holiday (50%) or visited friends and relatives (38%), while others explored the nature of the respective country by hiking, fishing, or simply staying away from areas with a high density of people.

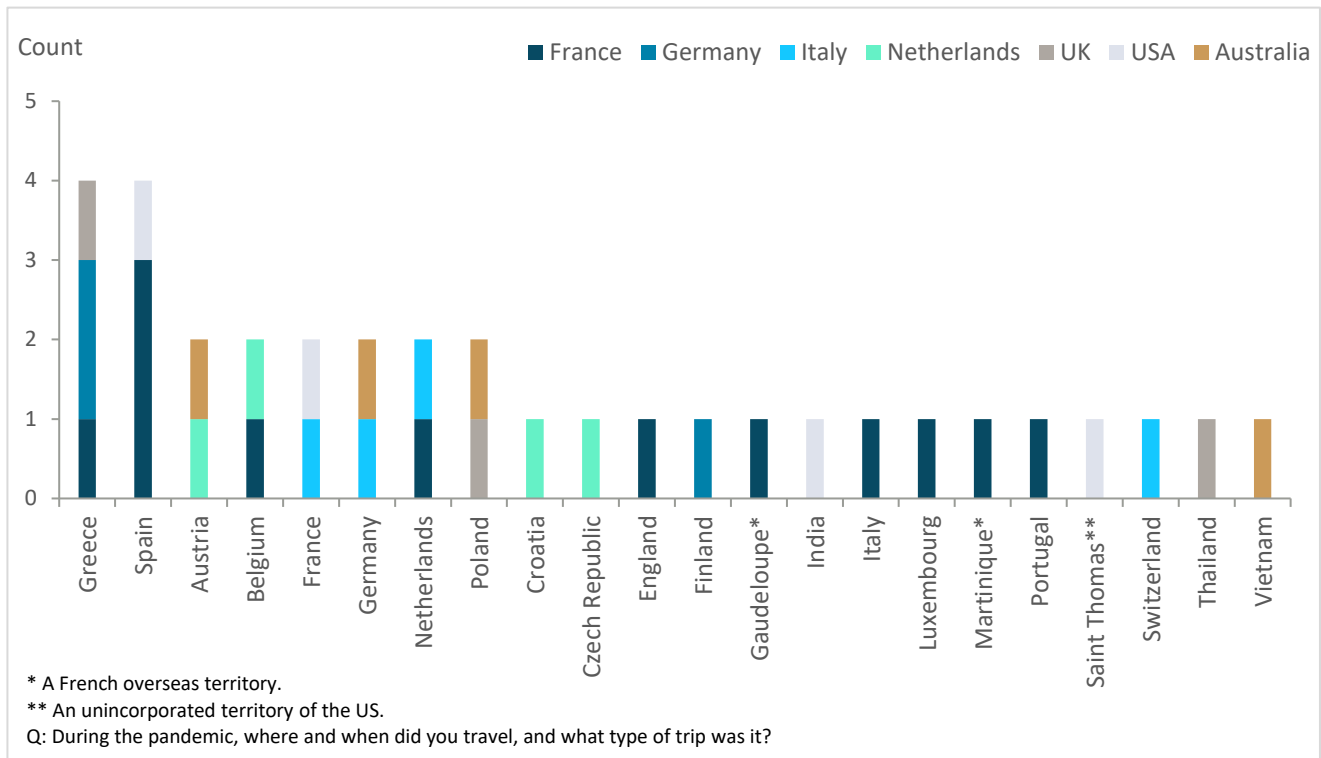[3] Respondents who have travelled outside their country of residence for holiday purposes during 2020 and 2021.
[4] The top 5 countries preferred for Europeans' next international trip: Spain (7.7%), Italy (7.5%), France (6.8%), Germany (6.7%), and Greece (5.5%). (European Travel Commission, November 2020)
[5] https://etc-corporate.org/reports/monitoring-sentiment-for-domestic-and-intra-european-travel-wave-2/

Graph 1: Countries visited when travelling abroad during the COVID-19 pandemic

Count

Legend: France, Germany, Italy, Netherlands, UK, USA, Australia

* A French overseas territory.
** An unincorporated territory of the US.
Q: During the pandemic, where and when did you travel, and what type of trip was it?

However, with the many changes in restrictions both globally and locally, travellers were compelled to make changes to their travel plans. Most changes included rescheduling the trip by moving the vacation closer or a bit further into the future. Of all interviewees, two travellers had to postpone their trip, and three had to cancel a whole trip. For example, an Australian traveller had to go home one week early from her trip to Vietnam before the border closed; a French traveller took a flight a few days earlier to avoid new restrictions in France; and a British traveller first had to cancel his trip to Spain and then rescheduled a trip to Greece several times.

> *"When the first lockdown started in September 2020, I had tickets to travel to Spain, Málaga, to see a friend. My flight got cancelled; I tried to change the tickets to early June the same year, but they got cancelled again. So, I changed the tickets to go to Greece in July, which also got cancelled. I managed to change the tickets to the end of July, which worked out, and I managed to get there."*
> - British traveller

It must be noted that the travellers who experienced the most challenges during their holidays were those who travelled overseas as many of the problems were with international flights. Additionally, when travelling by plane, the required documentation, tests, and increased time spent at airports reduced the enjoyment for some:

> *"Everything went as planned. We prepared everything, the European passenger locator form, and the tests we needed. We informed ourselves before and stayed updated in case the law or the requirements changed. It was a headache to keep up to date. You had to make sure you had everything you needed at the airport."*
> - British traveller

> *"The only thing that could have been better was the travel time through the airports. That was significantly increased. Leaving from Australia, travelling through China and then having to go to Warsaw. It was probably double or triple the time of going through the control points. That was very frustrating and tiring*

for long-haul travel. China was hard due to the language barrier, and there was a lot of documentation that they required to move beyond the Beijing Airport."
- Australian traveller

People using other means of transportation (e.g. car, train, etc.) generally experienced less frustration during the travelling phase. For example, the German travellers in this study avoided air travel to reduce the probability of potential complications. Additionally, the use of cars gave the German travellers more flexibility in terms of getting to attractions at the destination.

Travellers were generally satisfied with their stay at the destination

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At the respective destinations, the consensus is that it was easy enough to navigate around thanks to online research or consulting travel agencies prior to the trip:

"Upfront, the travel agency told us there were a lot of rules at our vacation destination, but when we arrived, it was quite easy."
- Dutch traveller

"I am glad someone told me about it [what he had to be aware of]. I think the other people were unprepared as I think that anywhere you want to go, you have to research about what you have to do to get there."
- American traveller

"Paris is always well-organised. All the services were active. I did not find any difference with previous years."
- Italian traveller

Additionally, the habits obtained at home regarding COVID-19 sanitary measures were easily applicable to the destination country.

"We limited our use of public transport, we were wearing a mask everywhere, we tried to avoid crowds. We did not do the usual activities; we did not go shopping in crowded malls. After all those lockdowns, we were used to it, wearing masks, and avoiding crowds, so life was as usual in our own city. We were not expecting low rates of COVID or that we could go everywhere and anywhere without masks. We are still in Europe, so we know the laws and the way of life, so it was all things we are now accepting as common."
- British Traveller

89% of the travellers in this study express that the destination(s) they went to lived up to their expectations. An Australian traveller was especially surprised by the good standards he met in Europe.

"As our trip to Thailand was cancelled due to COVID-19, we went to Belgium instead. […] Everything went fine, and we were very positive about the hygiene."
- Dutch traveller

"They exceeded my expectation. The standards in Europe are very high in terms of hospitality and service, also from a health standpoint on the pandemic. So, all precautions were taken like cleanliness, hygiene, testing, wearing masks, sanitation of the hands and anywhere I went, eating, staying somewhere, and activities in public. Everything was very good."
- Australian traveller

"The hotel had good service, and hygiene level was high. They cleaned a lot which was great, so we could avoid getting sick."
- American traveller

However, a few of the travellers were less cheerful as they met some obstacles after arriving at their destination, e.g. curfew, closed attractions, or shops. Though it was not enough to ruin it for everyone, a few were left disappointed. A French traveller was unprepared for the current situation at her destination and was dissatisfied due to the lack of activities available:

"A lot of things were closed, there was a curfew, no animations [no entertainment and activities during the day or evening] in the hotel, so it was really boring."
- French traveller

Similarly, the Australian traveller who went to Vietnam did not think it lived up to her expectations as Vietnam was very cautious regarding COVID-19 measures. Thus, she did not enjoy the vacation. Her wish for future travel is:

"More support from the embassies over there, when it comes to helping with health issues, pandemic, Covid, being able to get an emergency flight back, and accommodation. Just anything that is an emergency when you are overseas."
- Australian traveller

A traveller from the United Kingdom visiting Thailand managed to adapt to the obstacles and spent more days in Bangkok than expected due to cancelled domestic flights. Hence, he arranged some day trips with a friend living in Thailand, resulting in an enjoyable vacation despite the challenges.

Looking at the characteristics of the tourism products and services adopted during the pandemic that travellers would like to see remain in the future; the most mentioned service is flexible cancellation policies, followed by enhanced hygiene standards. Flexible cancellation policies have generally been perceived as very positive, especially because it is usually more tedious to get refunds for plane tickets.

"Compared to a hotel, I can just cancel a few days before, which is not a problem, but with flights, it is another story."
- British non-international traveller

The higher standards of hygiene in terms of hand sanitising stations in public areas, better cleaning in hotels, and public transportation are all welcome initiatives. To a French traveller's disappointment, diminishing hygiene standards were observable on trains after the withdrawal of the restrictions.

"On the trains, during COVID-19, I thought, "this is all clean, and there is even toilet paper", it never happened before, but immediately when there were no sanitary measures, it went back to how it was before in some countries, but not in Germany or Italy."
- French traveller

The high demand for keeping flexible cancellation policies and the enhanced hygiene measures falls in line with the results in wave 11 of the MSIET research[6] (April 2022). The study found that flexible cancellation policies are the top travel confidence booster, with approximately two-thirds of the surveyed respondents having a

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[6] https://etc-corporate.org/reports/monitoring-sentiment-for-domestic-and-intra-european-travel-wave-11/

positive sentiment towards strict health and safety measures. Knowing that their health is a top priority for the destination makes them feel more relaxed and safer.

Graph 2: Products and services wished to remain in the future

Q: What characteristics of the tourism products and services, adopted during the pandemic, would you like to remain in the future?
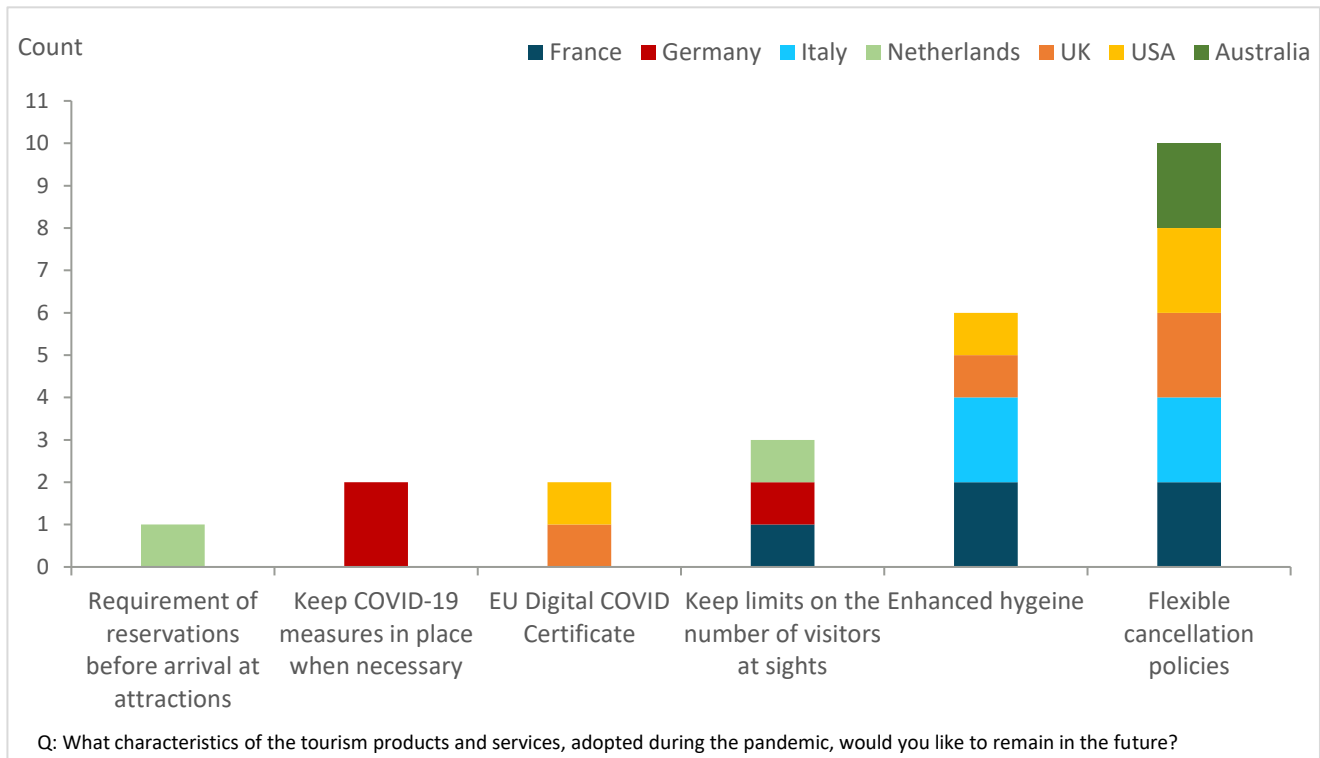
A less mentioned service is the EU Digital COVID Certificate application, however, two travellers acknowledge the application as a tool that eases the travelling process:

> *"The app made it so much easier compared to doing all the paperwork."*
> - British traveller

Hence, the EU Digital COVID Certificate as a travel confidence booster does not seem to get as much attention as in the 11th wave of the MSIET research (April 2022), where 60% of respondents emphasise the importance of the EU Digital COVID Certificate.

1.2 KEEPING IT DOMESTIC

At the other end of the spectrum, non-international travellers chose not to travel abroad during the pandemic but instead only travelled domestically or not at all. The specific rationale for staying home varies, but the overall theme is the same: COVID-19 and the difficulties derived from the pandemic.

Fear of COVID-19

Fear of quarantine

Feeling uncomfortable with crowded planes and trains

Unknown long-term effects of COVID-19

Have other health issues

Already suffering long-term effects due to COVID-19

Friends or relatives got infected on vacation

Unsure if people at the destination follow restrictions

Essential worker

Fear of illness

Inconvenient restrictions

Prohibition of non-essential travel

Government advised not to travel

Lack of information on requirements to visit destination

Cumbersome rules and travel restrictions

Fear of a less enjoyable vacation due to restrictions

Travel bans at the destination country

Fear of travel costs

The different procedures when travelling by plane

Have not kept up with requirements for travelling

Negative advice from travel agencies

No travel options at desired travel time

Q: What were the reasons, concerns or challenges relating to the COVID-19 pandemic that stopped you from travelling?

Overall, the non-international travellers fall into two groups: People who wanted to travel abroad but stayed home due to the inconveniences of travel restrictions, and people who did not want to travel due to the fear of getting infected. The largest group was formed by those who wanted to travel but did not want to go through the COVID-19 restrictions. Here, the most common issue was the prohibition of non-essential travel, which is mentioned by all French non-international travellers and one Australian non-international traveller.

Additionally, both Australian non-international travellers put weight on the possibility of not being able to get back into Australia due to Australia's strict entry restrictions.

> *"I did not fancy being in quarantine somewhere in Europe or some other part of the world and not being able to get back to my family for an unspecified amount of time. It did happen to some Australians during the pandemic that they could not get home for some months."*
> - Australian non-international traveller

Other issues with travelling were either a lack of information about restrictions or inconveniences tourists might face during the holiday:

> *"Even when the situation was more manageable, and it was possible to go around, the methods and modalities to go around made you think twice; swab tests everywhere, multiple checks and controls."*
> - Italian non-international traveller

A British non-international traveller stands out from the others as her reason for staying home was due to her job as an essential worker:

> *"I usually would travel quite a lot for leisure, but I work as a nurse, […]. I did not really feel I had a good enough reason to travel. I do not think it was valid enough to go and risk getting COVID just for going on a holiday."*
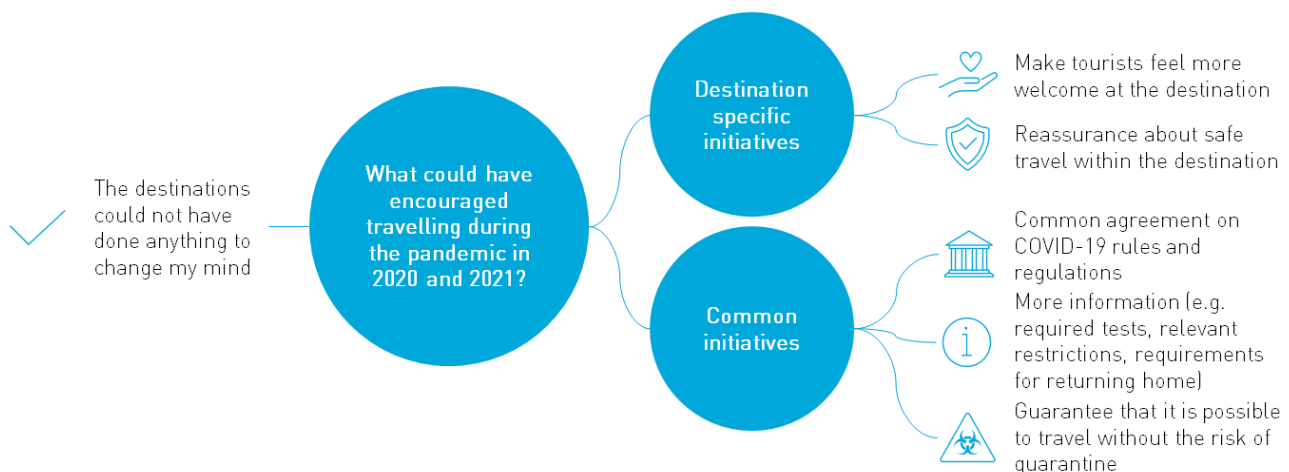
- British non-international traveller

The rationales for the group who did not travel due to the fear of getting sick are mostly health-related.

The fact that the largest of the two groups are those who did not travel due to the pandemic restrictions is supported by the findings in the "International Travel & Tourism – Report 2021" (YouGov, June 2021)[7]. In this study, this group is the largest for six of nine countries[8] compared to the group not travelling due to health risks.

Graph 4: Initiatives from the European countries that could have encouraged travelling

Q: Could European destinations have done something differently to encourage you to travel, or would you have stayed put regardless?

For European destinations to encourage travel among the non-international travellers, the main initiative would have been to find a common agreement on the restrictions and regulations at a European level to lessen the hurdle of navigating through each country's pandemic rules and measures. The French, German, and Italian non-international travellers agree on the following:

> "It would have been helpful to have a single standard protocol for the whole European Union, making it easier to travel without changing the system every time."
> - Italian non-international traveller

Unlike those three countries, the destinations could not have done anything to convince the Dutch non-international traveller to go abroad:

> "I had COVID-19 myself, and I did not know the short- or long-term effects, so I stayed home."
> - Dutch traveller

Moving to the United Kingdom, one participant thought that the European destinations could have done more to make tourists feel welcome and reassured that travelling to the destination was safe:

> "Maybe just some more reassurance about the safety of the places you wanted to go. I did not feel like they were very welcoming for tourists from the UK due to the high cases here."
> - British non-international traveller

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[7] https://business.yougov.com/content/36500-international-travel-tourism-report-2021
[8] The countries are: the United Kingdom, Germany, Norway, Denmark, Spain, Finland, France, Sweden, and Italy.

Turning overseas to Australia and the United States, one respondent from each country believes that their own country is at fault for them not being able to travel. The Australian did not think the European countries could have done anything as it was the restrictions in her state of Australia not allowing travel. Similarly, the American non-international traveller did not want to risk getting stuck in another country due to the US' Test Return Policy.

Non-international travellers are very positive that the challenges caused by the COVID-19 pandemic will be gone by the end of 2022

The majority of non-international travellers in this study (61%) are positive about a future with either none or only negligible challenges related to COVID-19. The positivity in the interviews carried out in this study is high relative to the respondents in the "Flash Eurobarometer 499 – Attitudes of Europeans towards tourism" (European Commission, January 2022)[9], where 21% do not expect any long-term effects of the pandemic.

Zooming in on the country level, Australian, Dutch, and French non-international travellers do not expect any challenges as the summer peak season approaches. In Germany, interviewees do not expect anything like in 2020-2021, but assume that the obligation to wear masks and social distancing will continue. They also assume that the possibility of Germany tightening travel restrictions again is there. In Italy, they are positive that the challenges will not be relevant throughout the year, however, they do think there will be a lingering psychological discomfort connected to the idea of travelling. Of the American non-international travellers, one is very much against the COVID-19 initiatives and will avoid all places with any measures in place. He believes that the COVID-19 measures will remain relevant in 2022, at least for travelling in the summer. Lastly, the British non-international travellers represent every part of the spectra on the severity of the challenges. One is ready to get on with life and does not think COVID-19 will result in more challenges; another thinks it is getting slightly better but will monitor the situation; the last is concerned about the high number of cases brought by the Omicron variant and is cautious, as he thinks people have become too careless regarding the COVID-19 guidelines.

1.3 CITY TRAVELLERS STAYED AT HOME

Looking at the three segments, Creative Cities, History and Ancestry, and Nature and the Outdoors, it is observed that virtually everyone within the Creative Cities segment is a non-international traveller, while those categorised under the History and Ancestry segment are mostly travellers.

Based on the non-international travellers' reasoning for avoiding international trips, it is clear that the restrictions and general fear of COVID-19 have kept the Creative Cities segment from travelling. Due to the main interests of the segment, the incitement for travelling was put down with the lockdowns in most countries resulting in closed attractions and fewer things to see and do in the cities:

> *"With the uncertainty brought by the COVID-19, I did not want to travel."*
> - Dutch non-international traveller, Creative Cities segment

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[9] https://europa.eu/eurobarometer/surveys/detail/2283

For the History and Ancestry segment, many of the travellers took advantage of the COVID-19 situation to visit friends and relatives abroad or travelled to explore nature, where the restrictions were less of a hurdle after having arrived:

"I travelled to the Caribbean, Saint Thomas. […] I have some friends who moved there, so I wanted to visit them."
- American traveller, History and Ancestry segment

"The Thailand trip was a bit of everything (city break, day trips). I went for three weeks, where most of the time was in Bangkok. I had day trips out of Bangkok. I visited Kanchanaburi, where the bridge over River Kwai is. I wanted to see the sights but also to visit the war graves."
- British traveller, History and Ancestry segment

"In 2021 December, just before Omicron, we went to India. First, we stayed in New Delhi before going to Hyderabad for a nature trip and then to Kochi to experience the famous backwaters."
- American traveller, Nature and the Outdoors segment

The Creative Cities segment was hit harder by pandemic restrictions due to the closure of attractions and lack of activities at their preferred travel destinations

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Overall, the restrictions have been an obstacle for most non-international travellers regardless of their segment, as the potential challenges the restrictions imposed at the start of the trip have been enough for people to stay at home:

"All the COVID-19 restrictions have gone too far […] I am ready to travel but not with the COVID-19 restrictions."
- American non-international traveller, Nature and the Outdoors segment

Graph 5: Distribution of segments between travellers and non-international travellers

Count

■ Traveller ■ Non-international traveller

Q: Have you travelled outside your country of residence for vacation purposes during 2020 and 2021?

Nevertheless, the Creative Cities segment got hit by two key parameters: The complications of travelling and their main interests at the destination being closed. The restrictions were especially a problem for overseas travel.

> *"Many of the places abroad we wanted to travel to were closed to travel. We were interested in travelling to Europe, Canada, Japan and whatnot, but they were closed at different levels."*
> - American non-international traveller, Creative Cities segment

1.4 SUMMARY

The decision to travel or stay at home during the pandemic divided people worldwide. Where some would not let the COVID-19 restrictions stop them from travelling, others were more cautious. The level of caution about COVID-19 varied among individuals, and some countries introduced more severe restrictions than others. As a result of the changing restrictions the analysis of which restrictions were relevant in different countries has been a daunting task for travellers.

Generally, travellers were satisfied with their stay at the destination(s) visited during the pandemic. It was primarily the tourists travelling overseas with international flights who experienced the most obstacles due to the required documentation, tests, and increased time spent at airports. Nevertheless, when they arrived at their destination, the problems were few as the habits from home regarding COVID-19 sanitary measures, were easily applicable to the destination country.

Among the non-international travellers, the main reasons for not travelling were the fear of getting COVID-19 and different aspects of the pandemic restrictions, such as having to quarantine, prohibition of non-essential travel outside the home country, and the perception of having a less enjoyable vacation due to the restrictions or closed attractions. Likewise, the restrictions were also a hurdle for many travellers, resulting in rescheduling

or shortening their holidays. Nevertheless, while being at the destination, those who had done research from home found it easier to navigate and adapt.

Of the initiatives that have been introduced during the pandemic, the most requested one to remain is flexible cancellation policies, followed by enhanced hygiene. Especially, flexible cancellation policies eased the concern about unforeseen situations ruining the trip close to the travelling day. While the travellers appreciated these initiatives, a common agreement between countries on the restrictions and regulations could have encouraged more non-international travellers to travel internationally. Nevertheless, about one-third of the non-international travellers would have stayed put at home regardless.

CHAPTER 2

THE EFFECT OF THE COVID-19 PANDEMIC ON TRAVEL BEHAVIOUR
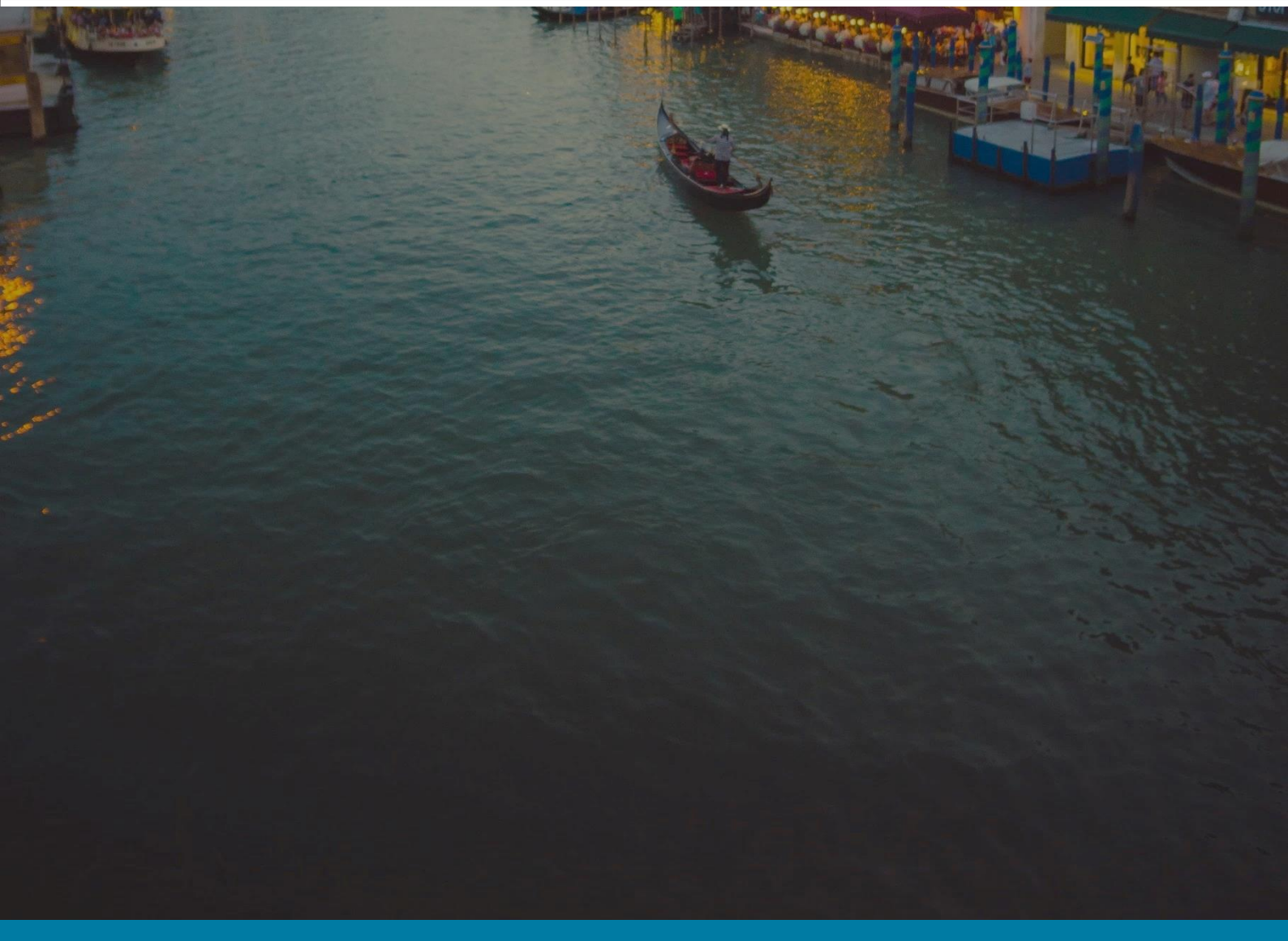
2. THE EFFECT OF THE COVID-19 PANDEMIC ON TRAVEL BEHAVIOUR

MAIN FINDINGS

- The COVID-19 pandemic has primarily affected travel behaviour by making the interviewees keep following the COVID-19 guidelines, avoiding crowded places, and taking out travel insurance.
- Following the COVID-19 guidelines is the habit most agree will remain in the long-run, while the need to take shorter trips to nearby destinations is a habit that will disappear in the short-term.
- Due to the COVID-19 pandemic, many travellers will not plan their holidays too far ahead in the future, decreasing the risk of unforeseen events happening before the travel date. Additionally, planning more carefully and in detail will be more common (e.g. research about the vaccination rate at the destination, or if the accommodation type lives up to the individual's hygiene standards).

With COVID-19 being a part of people's lives for over two years, it has impacted how they travelled during 2020 and 2021. Now with most of the world having either removed all COVID-19 restrictions or being in the process of lessening them, more normal ways of travelling are starting to return. While some individuals will go back to the pre-pandemic travel patterns, others have been more affected, resulting in changed travel behaviour and preferences.

2.1 THE IMPACT OF THE PANDEMIC ON TRAVEL BEHAVIOUR AND PREFERENCES

When reflecting over the past two years of the global pandemic, i.e. 2020 and 2021, almost all of the interviewees find that it has impacted their travel behaviour and preferences, but also what they will consider now in relation to going on a holiday compared to before. Only three interviewees express that their travelling behaviour is completely unaffected by the pandemic.

"No, not really. I am ready to get back to the time before COVID-19. As if it never existed."
- American non-international traveller, Nature and the Outdoors segment

"My attitude has not changed. It is like it was pre-pandemic."
- Australian non-international traveller, History and Ancestry segment

Most interviewees agree that the general guidelines during the COVID-19 pandemic in terms of social distancing, wearing masks, and practising better hygiene have become everyday habits[10]. Thus, they will also try to follow them when going on a holiday.

"Wearing a mask and keeping your distance is important everywhere."
- German non-international traveller, Nature and the Outdoors segment

"If possible, I would like to keep as safe at a distance from other people as I feel comfortable with. If that is not possible, I will avoid these busy places."
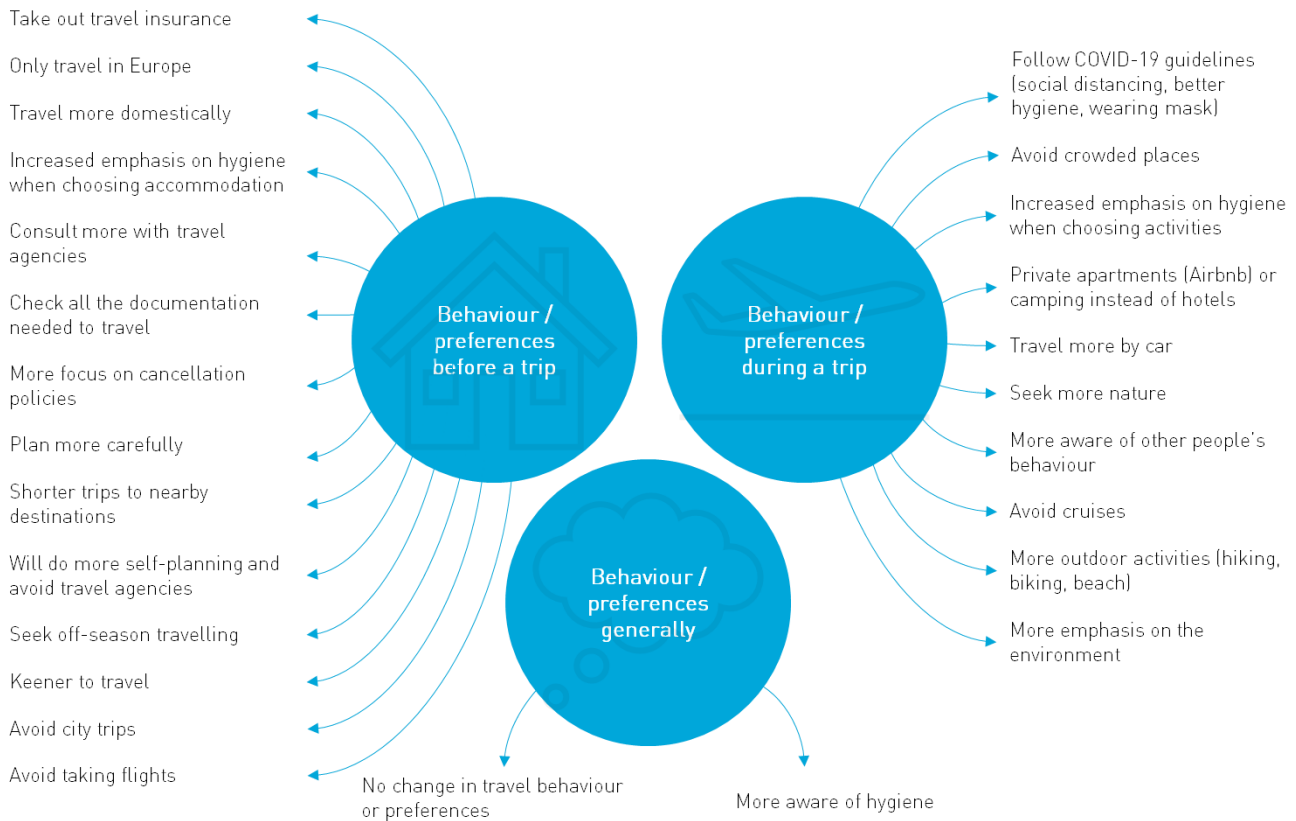- Dutch non-international traveller, Creatives Cities segment

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[10] Throughout the text, if nothing else is specified, COVID-19 guidelines refer to the following: social distancing, wearing masks, and improved hygiene measures.

"Most definitely hygiene and be careful to social distance, regularly washing hands and sanitising especially in high-traffic areas like airports and train stations.
- Australian traveller, History and Ancestry segment

Graph 6: The COVID-19 impact on travel behaviour/preferences and considerations

Take out travel insurance

Only travel in Europe

Travel more domestically

Increased emphasis on hygiene when choosing accommodation

Consult more with travel agencies

Check all the documentation needed to travel

More focus on cancellation policies

Plan more carefully

Shorter trips to nearby destinations

Will do more self-planning and avoid travel agencies

Seek off-season travelling

Keener to travel

Avoid city trips

Avoid taking flights

Behaviour / preferences before a trip

Behaviour / preferences during a trip

Behaviour / preferences generally

Follow COVID-19 guidelines (social distancing, better hygiene, wearing mask)

Avoid crowded places

Increased emphasis on hygiene when choosing activities

Private apartments (Airbnb) or camping instead of hotels

Travel more by car

Seek more nature

More aware of other people's behaviour

Avoid cruises

More outdoor activities (hiking, biking, beach)

More emphasis on the environment

No change in travel behaviour or preferences

More aware of hygiene

Q: What kind of impact has the pandemic had on your travel behaviour and preferences? Before, during and after a trip? What aspects of your travel do you consider now that you did not consider before the pandemic?

Only 8% of interviewees claimed that the pandemic has had no impact on their travel behaviour and preferences

A British interviewee did not believe in the guidelines when the pandemic started, but her opinion has changed over the last two years.

"My mind has definitely changed about masks and hygiene. Before, I would be like, "why do you wear a mask?" but now I am more like, " why do you not wear a mask?". I will also be more cautious about washing my hands."
- British non-international traveller, Creative Cities segment

Besides following the COVID-19 safety guidelines, the interviewees will generally try to avoid crowded places when they are on holiday. The reasoning behind this is similar across all interviewees, with only minor differences, which is generally to avoid getting infected with the virus or feeling uncomfortable in larger crowds.

"I am going to stay away from big crowds to avoid the virus."
- French non-international traveller, Creative Cities segment

"When there are too many people around, I now feel more insecure."
- German traveller, History and Ancestry segment

However, one interviewee stays away from crowded places primarily to keep her children free of infection.

"I have two kids, and I need to keep my eyes on them, so I will be careful about places with many people. I want to avoid that they get sick.
- American traveller, Creative Cities segment

The third-largest aspect affected by the pandemic is the need to take out travel insurance. Some interviewees have become risk-averse regarding the impact of unforeseen or sudden changes prior to and during their holiday and would like to mitigate a potential financial loss with travel insurance.

"I have never thought about taking a cancelling insurance, but I will now in case the flight or hotel reservation gets cancelled."
- French non-international traveller, Creative Cities segment

"All classic insurances don't accept COVID-19 as an excuse to cancel anymore, like during the pandemic."
- French traveller, Nature and the Outdoors segment

"It made me think about where I want to travel a lot more, if I have the correct insurance, and if I am fully insured. I will be reading up on what is allowed with my insurance."
- British non-international traveller, Nature and the Outdoors segment

The risk-aversion to unforeseen changes is also reflected in the desire to keep travelling locally or close to their own country by taking holidays within Europe. However, it must be emphasised that nine out of the ten people who want to travel closer to home are from European countries. Only the Australian traveller, who had a bad experience in Vietnam, wants to travel domestically.

"I will plan more now before travelling and get insurance covering COVID-19. I will also travel more in my own country to less populated areas."
- Australian traveller, Nature and the Outdoors segment

The COVID-19 pandemic has increased risk awareness among interviewees towards unforeseen negative impacts before or during their holiday

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For the European interviewees, the reasoning for wanting to travel more locally or close to their own country is that it will be easier to return home in case of any problems.

"I will deliberately only choose nearby destinations, so I can get home faster."
- German traveller, History and Ancestry segment

"Before, I was more confident about booking. I would not care about the destination. I would book for the United States or Vietnam, but now I prefer picking closer countries, European countries, because it is a bit safer and more stable. If there are restrictions in the UK, you can easier foresee what will happen for the other European countries."

- British traveller, Nature and the Outdoors segment

"*As I couldn't go outside of Europe because of COVID-19 and all the restrictions, I will travel in Europe to be safe.*"
- French non-international traveller, Nature and the Outdoors segment

Also, a few interviewees will now consult travel agencies more to get some advice from experts in the field or buy a package tour.

"*I would also like to seek advice from travel agencies […]. Even though you can do thorough research yourself, it can be nice to get advice from people who have maybe travelled to these countries and may offer some better advice.*"
- Australian non-international traveller, Nature and the Outdoors segment

"*It would be exciting to try a package tour organised by a well-known and trusted travel agency instead of a self-organised trip.*"
- German traveller, History and Ancestry segment

Two interviewees will now do more self-planning instead of using travel agencies. One of the two had an especially bad experience with a travel agency, where he felt like his money was kept hostage by the agency.

"*Due to the Spain trip episode, the pandemic has made me want to avoid travel agency services. I understand that they have suffered from the pandemic, but we should not be held hostage by them. With this experience, we most likely want to plan the trips ourselves next time.*"
- American traveller, History and Ancestry segment

Lastly, there are, in different forms, changes in the interviewees' preferred choice of accommodation, types of destinations, and modes of transportation. All interviewees with a change in the preferred type of accommodation are from Germany. Instead of staying in a hotel, they would rather rent a holiday apartment/house or go camping.

"*I'm a bit anxious. I feel safer in the holiday apartment than in the hotel.*"
- German traveller, History and Ancestry segment

Nature will be sought out more instead of the city, and one interviewee will now avoid cruises due to the risk of a disease spreading fast.

"*I used to go on cruises, but I will not do that anymore, because there is a huge risk. Propagation is fast on a boat, and I don't want to be stuck on it.*"
- French traveller, Nature and the Outdoors segment

"*The pandemic has also made me want to travel more to places like the Galapagos Islands to get out into nature and reduce the number of city trips.*"
- American traveller, History and Ancestry segment

Two interviewees will switch flights with travel by car as it feels safer and has proven to be an attractive way of traversing borders. One British interviewee will try to avoid flights when alternative transport modes can be used.

"*I feel safer in the car.*"
- German non-international traveller, Nature and the Outdoors segment

"I don't think I will travel by flight if other options are available."
- British non-international traveller, Creative Cities segment

Comparing the above findings to the results of the "Flash Eurobarometer 499 – Attitudes of Europeans towards tourism" (European Commission, January 2022), some similarities are also observed. According to the European Commission research, the way most respondents think COVID-19 will influence them is paying "more attention to health and safety measures" (49%), followed by "more holidays in their own country" (38%). As in the European Commission study, the interviewees in this research will follow the COVID-19 guidelines, avoid crowded places, and pay special attention to the hygiene of accommodation establishments and tourism activities. Similarly, the interviewees will also travel closer to home.

2.2 SHORT- AND LONG-RUN CHANGES IN TRAVEL HABITS

Many different habits have been derived from the pandemic's impact on daily life and when travelling. When asked about the habits that will remain after 2022 (long-run) or disappear throughout 2022 (short-run), most interviewees emphasised the COVID-19 guidelines. Here 94% of the interviewees who mentioned "keep following the COVID-19 guidelines" believe that this habit will remain in the long-term:

"Definitely hygiene and social distancing and making sure that I am aware that COVID is here to stay. It is something that will not go away, and we need to learn to live with it and manage it while mitigating further outbreaks and exposure."
- Australian traveller, History and Ancestry segment

"I think my travel habits due to the pandemic will remain until after 2022 [Keep social distancing, wear masks, stay at home/domestically]. I think we are heading towards lockdown again at some point with the rising cases at the moment. The government will try to keep us open until wintertime, but then the cases will increase again during the winter. Also, due to the stop in the vaccine programme, the effect of the booster shots will decline again, so I cannot see an end to it at this point."
- British non-international traveller, Creative Cities segment

"The use of facemasks. Although I hate them, I know they help avoid the transmission of viruses and bacteria. I might feel like taking them with me in the future, just to feel safer."
- Italian non-international traveller, Creative Cities segment

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Following the COVID-19 guidelines on holidays will remain after 2022

The interviewee leaning towards the view that the COVID-19 guidelines will disappear in the short-term just wants to go back to his old habits.

"The use of masks might disappear, hopefully. I will most likely go back to my old habit whenever the pandemic is over."
- American traveller, Creative Cities segment

Habits to remain after 2022

- Keep following the COVID-19 guidelines (social distancing, better hygiene, wearing mask)
- Take out travel insurance
- Avoid crowded places
- More focus on cancellation policies

Habits to disappear during 2022

- Shorter trips to nearby destinations
- Take out travel insurance
- All COVID-19 measures

Q: Which of your travel habits, driven by the pandemic, do you think will remain in the future, after 2022? And which ones do you think will disappear in the short-term during 2022?

A German respondent emphasises the need to be flexible and adapt to the situation when needed in the coming months.

> *"You have to be flexible, rebook, and if necessary, cancel a trip."*
> - German traveller, History and Ancestry segment

The fact that interviewees are interested in the COVID-19 guidelines remaining in place for a longer period of time is supported by the research "Travel in 2022 – A Look Ahead" by Tripadvisor and Ipsos MORI (January 2022)[11]. The study found that the respondents would like to see safety measures in place at hospitality businesses, even after COVID-19 cases have dropped worldwide in the next 12 months. Between 63-83% of the respondents in five different countries[12] agree that they would like safety measures to stay in place for the next 12 months.

Lastly, there is a focus on travel insurance and flexible cancellation policies. There is an equal distribution between interviewees who believe travel insurance's relevance will remain in the long-term or short-term. With the flexible cancellation policy, an interviewee had such a bad experience with getting a refund that he will now focus more on which company he uses, and if they offer flexible services.

> *"The pandemic has increased my willingness to take out travel insurance for this year."*
> - Italian non-international traveller, Creative Cities segment

> *"I will just make sure that I have travel insurance and that I know the area I am going to visit as well as the facilities around the area.[…] I hope we can relax more soon about COVID, but it all depends on the evolution of the disease."*
> - British non-international traveller, Nature and the Outdoors segment

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[11] https://www.tripadvisor.com/TravelTrendsReportJan2022
[12] The respondents are from the US, the UK, Australia, Japan, and Singapore respectively.

"After the pandemic, I prefer to book directly at the company instead of pages like Skyscanner as I used to before. I would still use Booking.com and Trivago.com. With Kiwi.com, it took 3 or 4 months for them to give me a refund, and I actually had to go through the bank. So, I will be more careful about the companies I use, and I will go after flexible tickets from now on.
- British traveller, Nature and the Outdoors segment.

2.3 RESEARCH AND PLANNING OF FUTURE TRIPS

The way that the interviewees research and plan their trips has likewise been affected by the COVID-19 pandemic.

The two primary ways in which interviewees' travel research and booking habits have been affected are in terms of booking time frame and how thorough they are in the planning process. Looking at the former, respondents are not interested in planning too far ahead, given the possibility of unforeseen events happening, and would rather book a trip closer to the travelling date.

"I will not plan as much in advance as before as I am scared to invest time in a project that could get cancelled."
- French non-international traveller, Creative Cities segment

"I'll wait and see how Corona develops and then decide which trip I'll book exactly, what I'll do there, and so on."
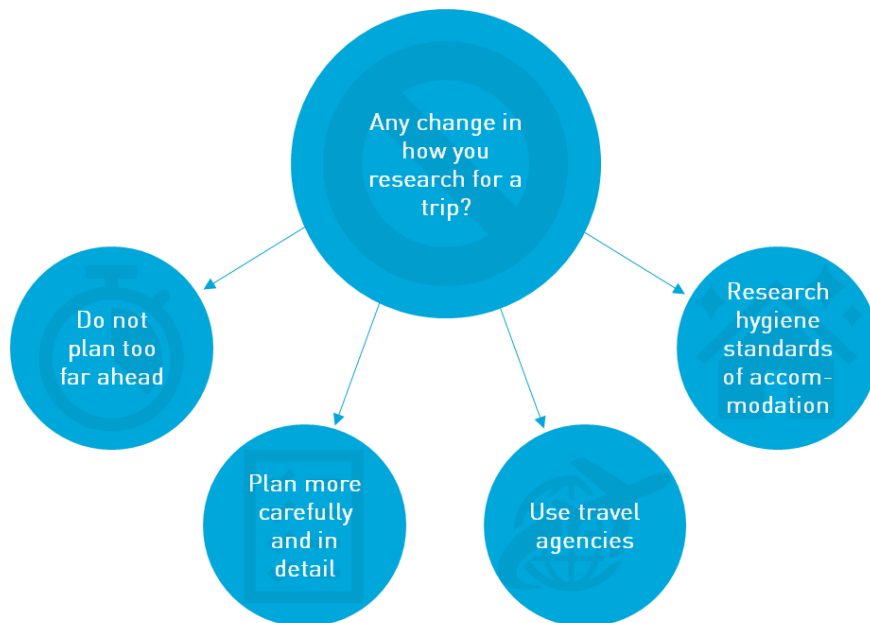- German traveller, Nature and the Outdoors segment

"I will no longer book too long in advance as things can change really quick in this crazy world."
- Dutch traveller, Nature and the Outdoors segment

Interviewees will not plan trips too far into the future and will plan more carefully and in detail

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Q: Has the pandemic impacted how you research and plan your future trips? In which ways?

As to the booking process, interviewees will plan more carefully. The planning can involve researching the vaccination rate at the destination or investigating whether the accommodation type lives up to the interviewee's hygiene standards. Thorough planning for what to experience at the destination was also mentioned, as a British interviewee experienced how much it was possible to see when he did the necessary research from home.

> *"The vaccination rate in the target country also plays a role in the planning."*
> - German traveller, History and Ancestry segment

> *"I would probably read more reviews on cleanliness for hotels more than I would before. I would, of course, not go to a dirty hotel before, but now I will be more aware of it. So, I will look for which hotels take it seriously. [...] Before, I would most likely only have looked at the stars of the reviews, but now I will do more in-depth research."*
> - British non-international traveller, Creative Cities segment

> *"I like spontaneous things as I can be lazy, but when I went to Paris, I planned it well. I found all the things I wanted to see in Paris and put it into the map to find routes and such, so I might do that more often now."*
> - British Traveller, Nature and the Outdoors segment

When planning, interviewees will use the internet as it is an easy and quick way of obtaining information. The most used platforms are, for example, Booking.com, Tripadvisor, Google Searches, and Google Maps. Three respondents also mentioned using printed guides and magazines.

Four interviewees would use travel agencies to either assist in the planning process or avoid the hassle of doing the necessary research.

"*I would also like to seek advice from travel agencies and to see what is available both online and through brochures. Even though you can do thorough research yourself, it can be nice to get advice from people who have maybe travelled to these countries and may offer some better advice.*"
- Australian non-international traveller, Nature and the Outdoors segment

"There is no planning. Everything is easy with a travel agent. No one is willing to find and buy non-refundable trips anymore.
- Italian non-international traveller, History and Ancestry segment

2.4 SUMMARY

COVID-19 has certainly impacted the participants of this study in terms of their travel preferences and how they research and plan their holidays. The overall pattern seen in the chapter is that most interviewees have become more cautious about travelling.

The interviewees being more cautious is reflected in the pandemic's impact on their travel behaviour and preferences. Almost half of the interviewees agreed that they are keener to follow the COVID-19 guidelines when travelling – by social distancing, wearing masks, and better hygiene – which is also the habit most think will remain throughout 2022 and into 2023. About one-third will avoid crowded places during the trip. Additionally, more participants are open to taking out travel insurance to mitigate potential financial losses and visiting nearby destinations, so it is easier to return home if something happens. These impacts on travel behaviour are seen across the different countries and segments; thus, they can be seen as more general impacts. On the contrary, those who want to travel closer to home or only travel in Europe are primarily mentioned by European interviewees.

The interviewees will not book their holidays too far ahead to increase the certainty that the trip will happen, and they will now plan their trip more carefully and in detail.

CHAPTER 3

ATTITUDES TOWARDS TRAVEL TO EUROPEAN DESTINATIONS

3. ATTITUDES TOWARDS TRAVEL TO EUROPEAN DESTINATIONS

MAIN FINDINGS

- 94% of the interviewees in this study have a positive perception of Europe and the European countries as tourism destinations.

- The Russia-Ukraine crisis makes some interviewees uneasy, but the crisis itself does not affect their perceptions of Europe as a tourism destination.

- Mediterranean destinations – such as Spain, France, Italy, and Greece – are among those most interviewees want to visit, while they will avoid Russia and Ukraine. Some will also avoid countries bordering Russia and Ukraine.

As the summer of 2022 approaches, so does the holiday planning phase. With some countries having suffered from more severe lockdowns and the impact of the ongoing war between Russia and Ukraine, it would make sense that the interviewees may have experienced a change in attitude towards Europe as a whole or for specific European destinations.

3.1 PERCEPTIONS OF EUROPE AND EUROPEAN DESTINATIONS

When asked about their current perceptions of Europe and that of European destinations, all interviewees, except two, were positive. Although one of the less positive respondents does like Europe, the handling of the pandemic has influenced his perception in a negative direction. He remains somewhat positive about Europe at the moment and expects his attitude to be back to normal in two to three years.

> *"During the pandemic, it was the last place on earth I wanted to go. Everything was out of control, but that is now gone. So once again, old Europe is emerging. There might be some remaining residual changes in attitude, but in a period of 2 or 3 years, all that will go, and it will be back to normal."*
> - Australian non-international traveller, History and Ancestry segment

The second respondent is unclear in his answer about his perception but is mostly focused on the restrictions. Hence, his attitude is not explicitly uncovered, but he does express that it is unchanged. Therefore, it is considered to be neutral.

> *"In general, there is no change. I would like to urge countries to get rid of restrictions. It will be better for everybody."*
> - American non-international traveller, Nature and the Outdoors segment

The most liked characteristic about Europe is that the region has a lot to offer with the many different countries and cultures that form a relatively small continent. Hence, there are many countries the interviewees would like to visit, and they appreciate the possibility of getting new impressions without having to travel too far.

> *"There is no need to go far to find something very different to our own habits."*
> - French non-international traveller, Creative Cities segment

Table 2: Positive and negative aspects of Europe mentioned by interviewees

Positive aspects about Europe	Count
There is a lot to see in Europe	15
Have always enjoyed Europe (e.g. Europe is the typical destination, visited as young and still enjoy visiting).	8
Europe is "close" (no risk of longer flights, you can be back home faster)	4
European countries did better in dealing with the pandemic	3
Many different cultures	3
Europe feels safe	2
Europe worked together during the COVID-19 pandemic	2
Most Europeans speak English (which makes it easy to travel)	2
Explore countries of ancestors	2
Europe has learned to deal with the COVID-19 pandemic	1
European countries were welcoming to tourists during the COVID-19 pandemic	1
Greek islands are good for nature	1

Q: What has influenced your perceptions positively and negatively about Europe?

Negative aspects about Europe	Count
Feel uncomfortable with the Russia-Ukraine crisis	5
COVID-19 pandemic could have been handled better	3
Unstable political situation in Russia and recent elections in France	1

Q: What has influenced your perceptions positively and negatively about Europe?

"I would go to France, Italy, Germany, and I would even go to Denmark. Also Belgium and Spain. Spain is wonderful."
- Australian non-international traveller, History and Ancestry segment

"I did hear Italy had massive rates in the start, but it did not change my wish to go visit Europe. France, Italy, and Greece are all on my list of countries to visit. They have so much to offer."
- Australian traveller, Nature and the Outdoors segment

"It is on the top of our list. There are lots of places to visit like Croatia, Norway, Germany, Switzerland."
- American traveller, Nature and the Outdoors segment

"There are so many amazing places I would like to see. I am probably more inclined to visit Europe compared to before because I have always wanted to go to America and places like that, but now I am keener to take city breaks in Europe."
- British non-international traveller, Creative Cities segment

"We have the loveliest vacation destinations right on our doorstep: Italy, France, Spain - and Germany."
- German traveller, Nature and the Outdoors segment

"Here are all the landscapes and climates we can ask for."
- French non-international traveller, Nature and the Outdoors segment

94% of the interviewees have a positive image of Europe and European destinations

The four interviewees appreciating the geographical proximity of European destinations are all German. Europe being "close" allows to avoid flights and makes it faster to travel to and home from the respective destination.

> *"Europe is close. Destinations can be reached quickly, and you are back home quickly again."*
> - German traveller, History and Ancestry segment

Three European interviewees have had their perception of other European countries boosted as they believe other countries did better in managing COVID-19.

> *"I think that other European countries were better at dealing with the high number of infected. It has made me think more positively about travelling to other countries."*
> - Dutch non-international traveller, Creative Cities segment

> *"I think they did quite a lot better than us if I am perfectly honest. They used restrictions a lot better. […] So overall, my perception of the destinations has gone up."*
> - British non-international traveller, Creative Cities segment

However, the British interviewee will still stay put due to not feeling comfortable with the COVID-19 situation overall.

Looking outside of Europe, two Australian interviewees appreciate going to Europe to experience the countries of their ancestors. Visiting Europe allows them to see the countries, where their family roots originate from.

> *"Overall, I love Europe and European culture as I have roots in Europe. So, I have a very strong connection to Europe."*
> - Australian non-international traveller, History and Ancestry segment

> *"Europe will always be attractive to Australians. It is something special. It has a lot of history and a lot of cultures, and that is something we do not have that much of in our country. We are multicultural but we do not have our own identity. So, when you travel to countries like Finland, Denmark and Germany. They are multicultural in their own right but there is that heritage, history and identity."*
> - Australian traveller, History and Ancestry segment

Where the two Australians mention the aspect of experiencing countries where they have their family roots, two Americans like the aspect that many Europeans can speak English. This makes it very easy for them to travel through Europe experiencing many cultures, but without the language barrier.

> *"I enjoy Europe. it is very different from where we are from, but it is also accessible. I am bad at foreign languages so I appreciate that so many in Europe speak English."*
> - American non-international traveller, Creative Cities segment

> *"I do not know any other languages than English, and that is the fantastic thing about Europe because you all mostly speak multiple languages, and you can always find someone who wants to help in English."*
> - American non-international traveller, History and Ancestry segment

On the other side of the spectra, a few respondents have been influenced negatively. Three of four Australian interviewees believe Europe could have better handled the pandemic. While the fourth mentioned that despite Europe having some alarming infection numbers, it had not affected his willingness to visit the region.

> *"Maybe a few countries like Italy, France and Spain were on the news. It has been reported that the pandemic has been out of control. The deaths and the hospitalisation rates have been high. That is concerning, and I would not necessarily say that it is countries to avoid but to be aware that there are extra risks when travelling to those destinations."*
> - Australian traveller, History and Ancestry segment

> *"I did hear Italy had massive rates in the start, but it did not change my wish to visit it."*
> - Australian traveller, History and Ancestry segment

Even though the Australians believe Europe could have handled the pandemic better, the aspect mentioned by most is the Russia-Ukraine war. While the war does negatively affect interviewees, it is not extrapolated to their perception of Europe as a whole. Although respondents still think positively about Europe, the uncertainty around the war results in interviewees avoiding Eastern European destinations.

> *"Regarding the Russia-Ukraine crisis, there are all these displaced people, and from an ethical standpoint, would you take a room from a Ukraine family who may need them? I do not want to get in the way of people who are trying to improve their lives."*
> - American traveller, History and Ancestry segment

> *"I probably would not go to places close to Ukraine and Russia. It is mostly due to fear and lack of understanding about the situation. I did actually really enjoy going to Poland before, but I probably wouldn't go there right now as I am scared. I would not put myself in that situation and go somewhere I am more comfortable."*
> - British non-international traveller, Creative Cities segment

> *"I am being affected by the Russia-Ukraine crisis as my origins are from Russia. That is where my roots are, and my extended family lives there. I was planning to go to Russia, but I cannot now."*
> - Australian non-international traveller, History and Ancestry segment

Nevertheless, 94% of the interviewees have a positive perception of Europe despite the war in Ukraine and their negative assessment of how some European countries managed the pandemic.

3.2 THE DESTINATIONS TO VISIT OR AVOID

The positivity towards Europe and European destinations is reflected in the number of countries the interviewees are open to visiting. As seen in Chapter 1, there is a preference for warmer destinations. However, countries like Germany and northern destinations – such as Sweden, Denmark and Norway – are also mentioned by a few participants. The top 5 preferred destinations to visit in this study bear great similarity to the ranking of the MSIET research (April 2022), where the top 5 preferred destinations to visit by respondents were Spain (11%), Italy (9%), France (9%), Greece (7%), and Portugal (5%).
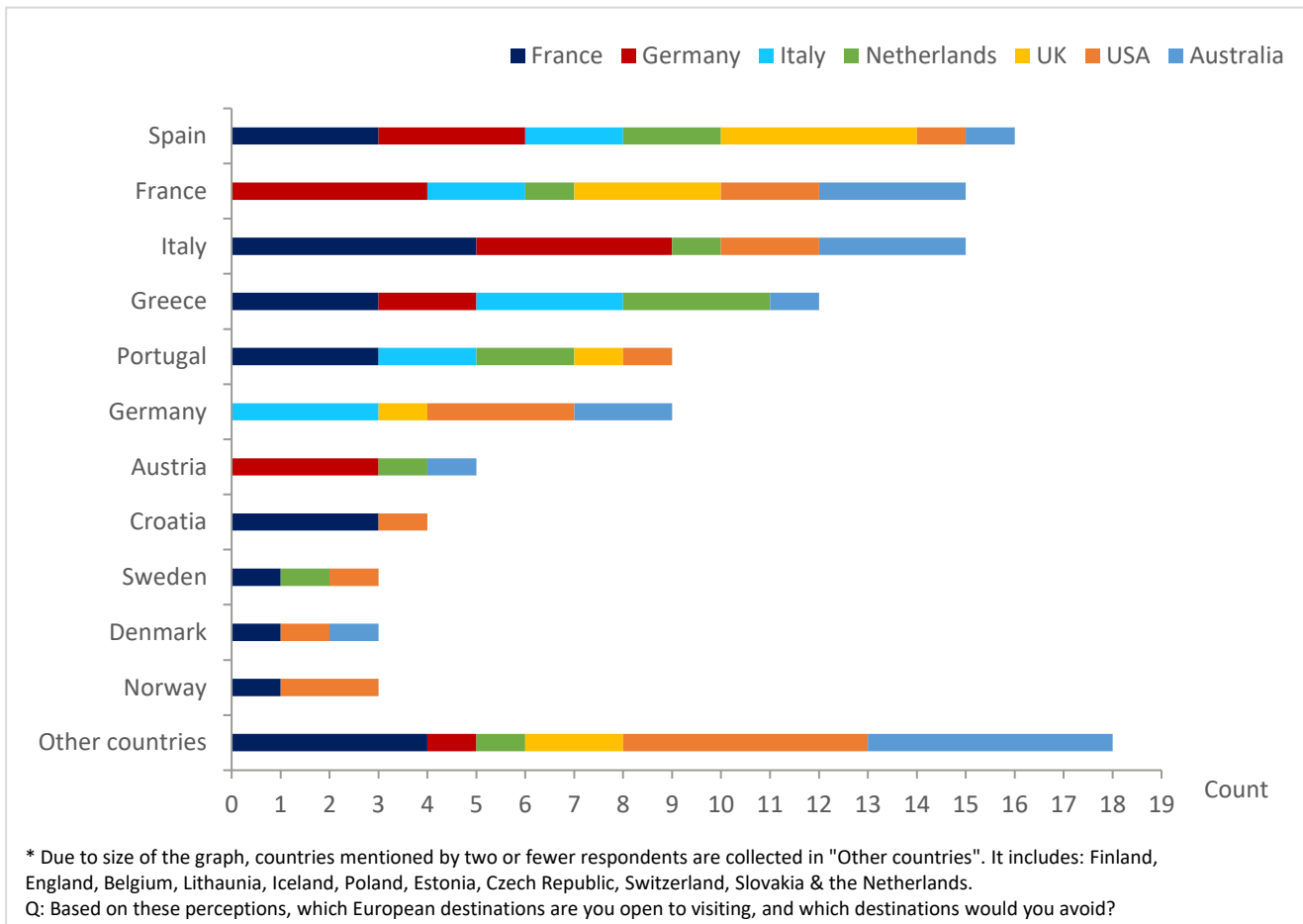
For a French interviewee, the appeal of the warmer countries is:

> *"You can do everything, visit cities and walk in nature, with a hot sun."*
> - French non-international traveller, Nature and the Outdoors segment

Graph 9: European destinations interviewees are open to visiting

Legend: France, Germany, Italy, Netherlands, UK, USA, Australia

Count (x-axis: 0–19)

Categories (y-axis): Spain, France, Italy, Greece, Portugal, Germany, Austria, Croatia, Sweden, Denmark, Norway, Other countries

* Due to size of the graph, countries mentioned by two or fewer respondents are collected in "Other countries". It includes: Finland, England, Belgium, Lithuania, Iceland, Poland, Estonia, Czech Republic, Switzerland, Slovakia & the Netherlands.

Q: Based on these perceptions, which European destinations are you open to visiting, and which destinations would you avoid?

While the interviewees are brief in their answers about which countries they are open to visiting, more depth is brought into the subject when discussing countries they will avoid. Here the dominant subject revolves around the Russia-Ukraine crisis. In fact, no other parts of Europe were mentioned besides Eastern Europe when it came to destinations they would avoid. The distance interviewees want to keep from Russia and Ukraine varies from only the two countries to most of Eastern Europe. Almost half of the interviewees (44%) mentioned they would just avoid Russia and Ukraine.

> *"Of course, I am concerned for Ukraine, but in terms of travelling, it does not concern me. In fact, I was thinking about going to Poland sometime this year."*
> - American non-international traveller, History and Ancestry segment

> *"The fighting is very localised in Ukraine, and it is not in other countries. So, the crisis will not really impact me."*
> - British traveller, History and Ancestry segment

A French traveller mentioned that, even though he will not visit Russia and Ukraine at the moment, he will be open to visiting those destinations again in the future:

> *"I am still open visit those countries because it [Russia] is a beautiful country, with a rich history and culture."*
> - French non-international traveller, Creative Cities segment

One-fourth of the interviewees will simply avoid Eastern Europe. One British and two Australian interviewees want to stay clear of countries close to the conflict; however, all the German interviewees are not interested in the Eastern part of Europe in general.

> *"I would not visit Russia, and I would not go to the countries nearby."*
> - Australian non-international traveller, History and the Outdoors segment

> *"Eastern Europe was not on my wish list anyway."*
> - German traveller, History and the Outdoors segment

8% (all non-European interviewees) mentioned that they will avoid Poland, and another 8% (all European interviewees) said that they will avoid all the neighbouring countries of Russia and Ukraine.

> *"Originally, I found some cheap tickets to Munich, and we were going to drive up to Berlin and go into Poland. Now we will go a little bit further away from that and maybe drive from Munich into the Alps."*
> - American non-international traveller, Creative cities segment

> *"I will not seek Ukraine, Russia, or the countries bordering those two. I think the leadership in Russia is too unstable."*
> - Dutch non-international traveller, Creative Cities segment
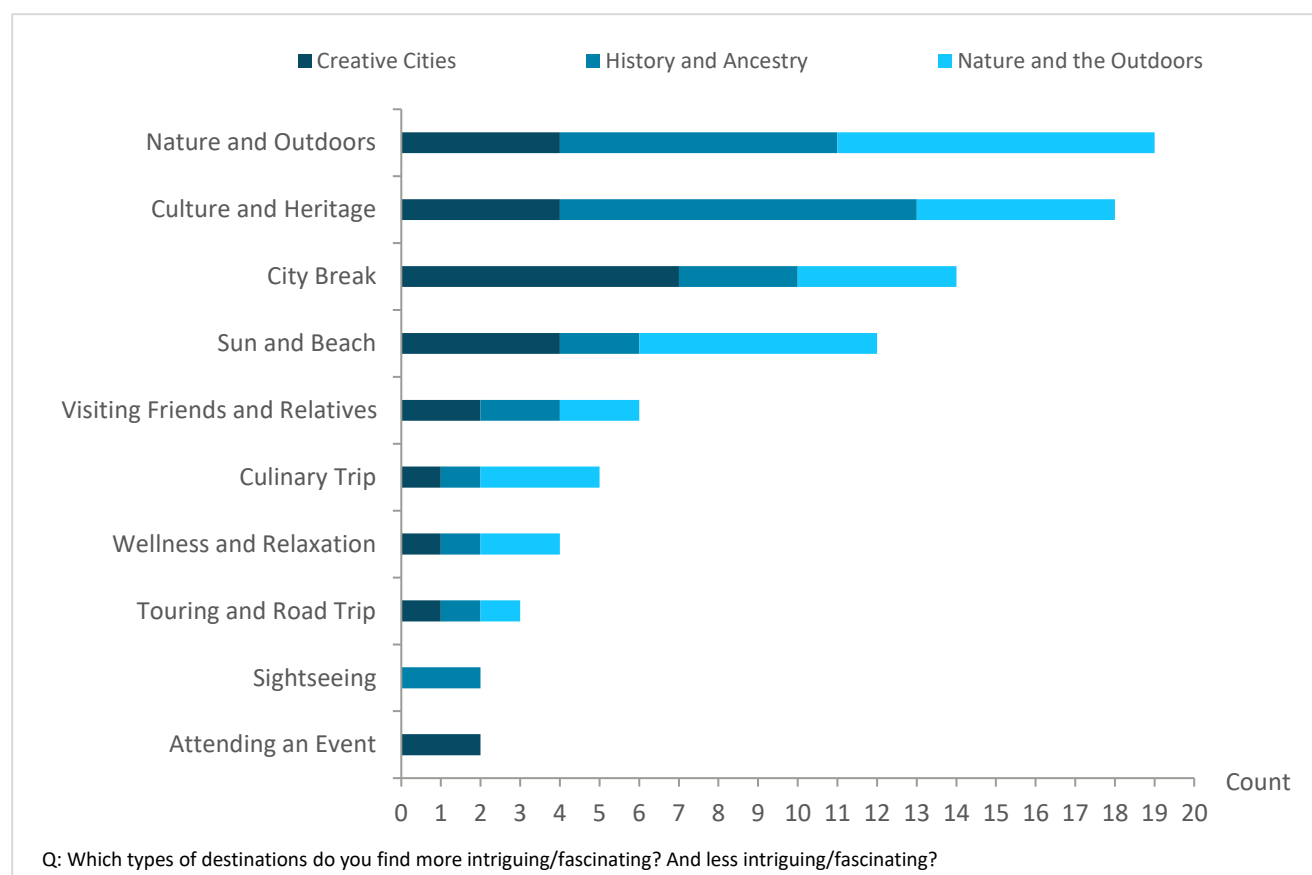
Although the interviewees did not specifically mention places they would avoid should there be no geopolitical conflict, they do have preferences for specific destinations and thematic experiences and will seek out these places and skip other options.

When analysing the most popular types of thematic experiences (Nature and Outdoors, Culture and Heritage, City Breaks), these are equivalent to the segment each respondent falls into, i.e. Nature and the Outdoors, History and Ancestry, and Creative Cities. As would be expected, the thematic experiences the interviewees are most interested in, are the ones that match their segment description, with Creative City travellers being most intrigued by City Breaks, History and Ancestry being intrigued by Culture and Heritage, and Nature and the Outdoors being most intrigued by Nature and Outdoor experiences as well as sun and beach. However, the History and Ancestry segment and the Nature and the Outdoors segment are almost equally represented in the Nature and Outdoors experience.

Graph 10: Thematic experiences interviewees find most intriguing

Q: Which types of destinations do you find more intriguing/fascinating? And less intriguing/fascinating?

Though with some discrepancies, the most intriguing thematic experiences are comparable to the results of wave 11 of MSIET[13] (April 2022) and the research on "Sustainable Travel in an Era of Disruption: Impact of COVID-19 on Sustainable Tourism Attitudes"[14] [European Travel Commission, January 2022][15]. For the latter, Nature and the Outdoors only ranks as the sixth most important purpose of an international trip.

> *"I want to go to places where I can find interesting history and art."*
> - Italian traveller, History and Ancestry segment

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[13] Top 5: Sun and Beach (22%), City Break (15%), Coast and Sea (14.8%), Nature and Outdoors (13%), and Culture and Heritage (11%).
[14] Top 5: Sun and Beach, City Break, Visiting Friends and Relative, Culture and Heritage, Touring and Road Trip.
[15] https://etc-corporate.org/reports/sustainable-travel-in-an-era-of-disruption-impact-of-covid-19-on-sustainable-tourism-attitudes/

"When I travel, I mostly want to go on nice city trips, go on a road trip or visit family and friends."
- Dutch non-international traveller, Creative Cities segment

"I would try to combine a little bit of everything. I like the attractions in a major city like museums and buildings, but I also like the ability to move out of the city and to the countryside. I enjoy walking. The pandemic has definitely kickstarted me being more active."
- British traveller, History and Ancestry segment

"I am a Nature person by heart. I prefer to be outdoors. Museums are also fine, but I do not enjoy nightlife and theatres."
- American non-international traveller, Nature and the Outdoors segment

Not many types of destinations are mentioned as not being fascinating. Cruise travel was mentioned on three occasions. One respondent believes it is hard to find time for it and that it is too costly, while the others are more concerned about the risk of a viral outbreak while on a cruise.

"It is really hard to find time to do it [go on a cruise], and also, it costs so much more than what I'm used to."
- French traveller, History and the Outdoors segment

"Cruises are the only thing that really makes me nervous. That is where a lot of the virus was spread."
- American traveller, History and the Outdoors segment

"I used to go on cruises, but I will not do that anymore, because there is a huge risk. Propagation is fast on a boat, and I don't want to be stuck on it."
- *French traveller, Nature and the Outdoors segment*

3.3 SUMMARY

The positivity about Europe as a tourism destination is very high, with virtually all interviewed participants (94%) indicating that they positively perceive Europe as a travel destination. Of the two interviewees who did not have a positive perception, one was somewhat positive but noted that the handling of the COVID-19 pandemic, together with the political situation in Russia and 2022 elections in France had somehow decreased his positive sentiment. However, he was sure that everything would be back to normal in a few years. Some interviewees were, of course, affected by the Russia-Ukraine crisis, but it did not negatively impact their perceptions of Europe overall. However, they have become more cautious about visiting Eastern Europe.

The destinations most interviewees are interested in visiting are in the Mediterranean part of Europe– such as Spain, France, Italy, and Greece. Furthermore, these countries offer good conditions to experience the most intriguing types of thematic experiences: Nature and the Outdoors, Culture and Heritage, City Breaks, and Sun and Beach.

CHAPTER 4

TRAVEL EXPECTATIONS FOR THE 2022
SUMMER SEASON

4. TRAVEL EXPECTATIONS FOR THE 2022 SUMMER SEASON

MAIN FINDINGS

- Mediterranean countries – such as Spain, France, Italy, and Greece – together with Germany, are the most popular destinations for summer 2022.

- 80% of interviewed participants are either likely or very likely to book a holiday to Europe in the summer of 2022.

- The COVID-19 pandemic and the Russia-Ukraine crisis are not expected to severely impact the respondents' travel expectations for the summer season in 2022.

- Only minor health and safety measures are expected to be in place at European destinations.

This section analyses the interviewees' travel expectations for the summer of 2022 (i.e. June to September). In this chapter, the likelihood of the interviewees booking a holiday to Europe is discussed together with the interviewees' expectations for how their summer plans will work out, given the lingering uncertainty around the pandemic.

4.1 CONSIDERATIONS OF TRAVELLING TO EUROPE IN THE SUMMER OF 2022

For interviewees planning to travel to a European destination this summer, the most popular destinations are Spain, Germany, France, Italy, and Greece. As would be expected, the list is overall very similar to the list seen in Chapter 3 regarding the destinations the interviewees are generally open to visiting. Germany climbs up to second, pushing Portugal out of the top 5.

Graph 11: European destinations to be considered for summer 2022

Legend: France, Germany, Italy, Netherlands, UK, USA, Australia

* Due to the size of the graph, countries mentioned by only one respondent are collected in "Other countries". It includes: Belgium, Czech Republic, Denmark, Malta, Poland, Slovakia, Sweden & Switzerland.
Q: If you were to consider a trip to Europe/another European destination this summer (June-September), where would you be likely to travel to?

The most popular types of destinations are again relating to Culture and Heritage, Nature and Outdoors, and City Breaks. Looking at the holiday destinations, it can be seen that the most popular type of experiences for Spain and France are City Breaks, for Germany and Italy it is Culture and Heritage, and for Greece, Nature and Outdoors.

> *"I am going [to Spain] for adventure and some city break."*
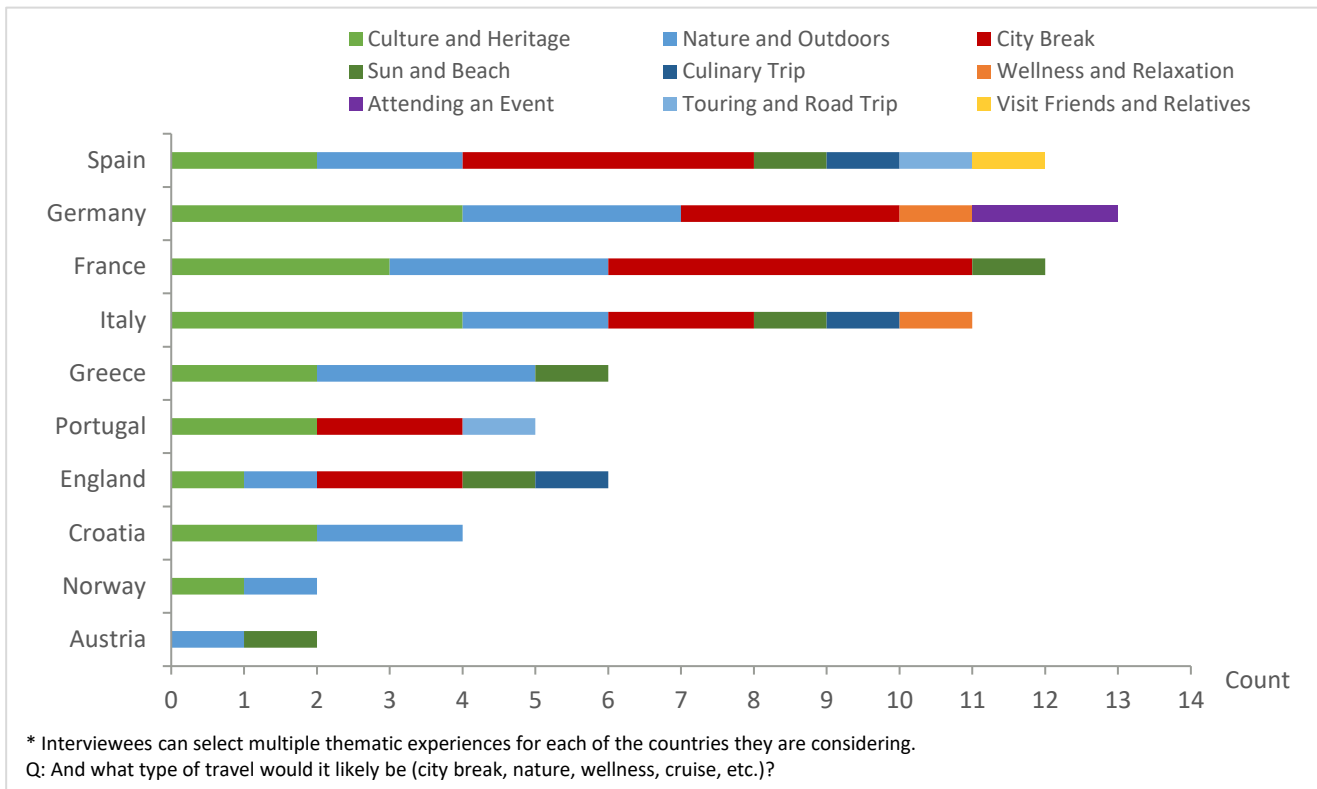> - French traveller, History and Ancestry segment

> *"I would go to Greece for a relaxing trip into nature. For a culture trip, any European capital would be good."*
> - Italian non-international traveller, Creative Cities segment

Graph 12: Thematic experiences considered by destination

Legend:
- Culture and Heritage
- Nature and Outdoors
- City Break
- Sun and Beach
- Culinary Trip
- Wellness and Relaxation
- Attending an Event
- Touring and Road Trip
- Visit Friends and Relatives

(Horizontal stacked bar chart showing counts by destination: Spain, Germany, France, Italy, Greece, Portugal, England, Croatia, Norway, Austria, with Count axis from 0 to 14)

* Interviewees can select multiple thematic experiences for each of the countries they are considering.
Q: And what type of travel would it likely be (city break, nature, wellness, cruise, etc.)?

"Looking at planning a camping trip to Austria at the moment."
- German non-international traveller, Nature and the Outdoors segment

While the countries and types of destinations look similar, it is worth exploring the likelihood of the interviewees going on a vacation to a European destination this summer.

80% of the interviewees indicated that they are either likely or extremely likely to book a holiday to Europe in summer 2022

As seen in Chapter 2, interviewees expressed higher caution regarding their travel behaviour, where following COVID-19 guidelines, avoiding crowded places and taking out travel insurance were the aspects COVID-19 had influenced them the most. Nevertheless, the interviewees show a very strong desire to travel following the results of the 11th wave of MSIET (April 2022)[16]. Likewise, similar positive results are presented in "Travel in 2022 – A Look Ahead" by TripAdvisor and Ipsos MORI (January 2022)[17].

Half of the interviewees in this study rate their likelihood of travelling to a European country this summer as 5 ("extremely likely")[18]. For French, German, and Italian participants, the ratings are equally distributed between

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[16] It is found that 81%, 82%, 75%, 71%, and 85% of Germans, Britains, French, Dutch, Italians are likely/very likely to travel in the next 6 months respectively.

[17] Compared to the likelihood of travelling internationally pre-pandemic in 2019, the numbers are up by 6pp for the US, 5pp for the UK and 3pp for Australia.

[18] The interviewees rated their likelihood of booking a holiday to a European this summer, 2022, on a scale from 1 to 5, where 1 is "extremely unlikely" and 5 is "extremely likely".

travellers and non-international travellers. All score either 4 or 5 with the rationale that their desire for travelling has not been properly satisfied for a long time. The French respondent who rated the likelihood as being 4 only chose this rating due to wanting to offer help to Ukrainian refugees if needed:

> *"It is not 100% sure because with the war, if some Ukrainian people need a house to sleep in, I will stay home to offer my help, so it is not totally sure I will travel."*
> - French traveller, History and Ancestry segment

For Dutch interviewees, the two non-international travellers have already booked their holidays, thus, giving a score of 5. The traveller giving a score of 4 wants to go to Southern Europe but may cancel if the number of COVID-19 cases is too high.

66% of American interviewees are likely to visit Europe this summer. The American interviewees' positivity toward visiting Europe seems to align with the results of ETC's "Long-Haul Travel Barometer 1/2022" (January 2022)[19], where an improvement in traveller's confidence to visit Europe in 2022 is observed. The study finds that 45% of the American respondents want to visit Europe in 2022.

Unlike the other interviewed markets, the British respondents are more divided between travelling and staying at home during the summer of 2022. Those who travelled during the pandemic are very likely to travel, but the two non-international travellers provide a score of 1 and 2 as they are not convinced that the pandemic status quo will be under control when summer comes.

> *"It is mainly due to the instability, so I will not be likely to travel."*
> - British non-international traveller, Nature and the Outdoors segment

> *"I will see how it works out. The restrictions have been lifted, and people no longer use a mask at the supermarket or keep social distancing, and with anxiety, I will worry more than most. A friend thinks we should just move on, but I do not fully agree. I want to feel confident."*
> - British non-international traveller, Creative Cities segment

Australia stands out compared to the other countries as the two interviewed travellers rate their likelihood of visiting Europe in summer 2022 lower than the non-international travellers with a rating of 3, while the non-international travellers rate 4 and 5 respectively. An Australian traveller who had a bad experience in Vietnam during the pandemic is now more cautious about travelling while COVID-19 is still a concern. However, she is still open to travelling and will do some research closer to June before deciding. The second Australian traveller is actually very positive about the situation as he can see the rising travelling numbers. Thus, the interviewee plans to travel if there are no new COVID-19 variants and no tightening of the restrictions.

> *"I have always wanted to go to Italy, Greece, and France. I am still considering and will do research later. I am still a bit cautious and scared due to COVID-19."*
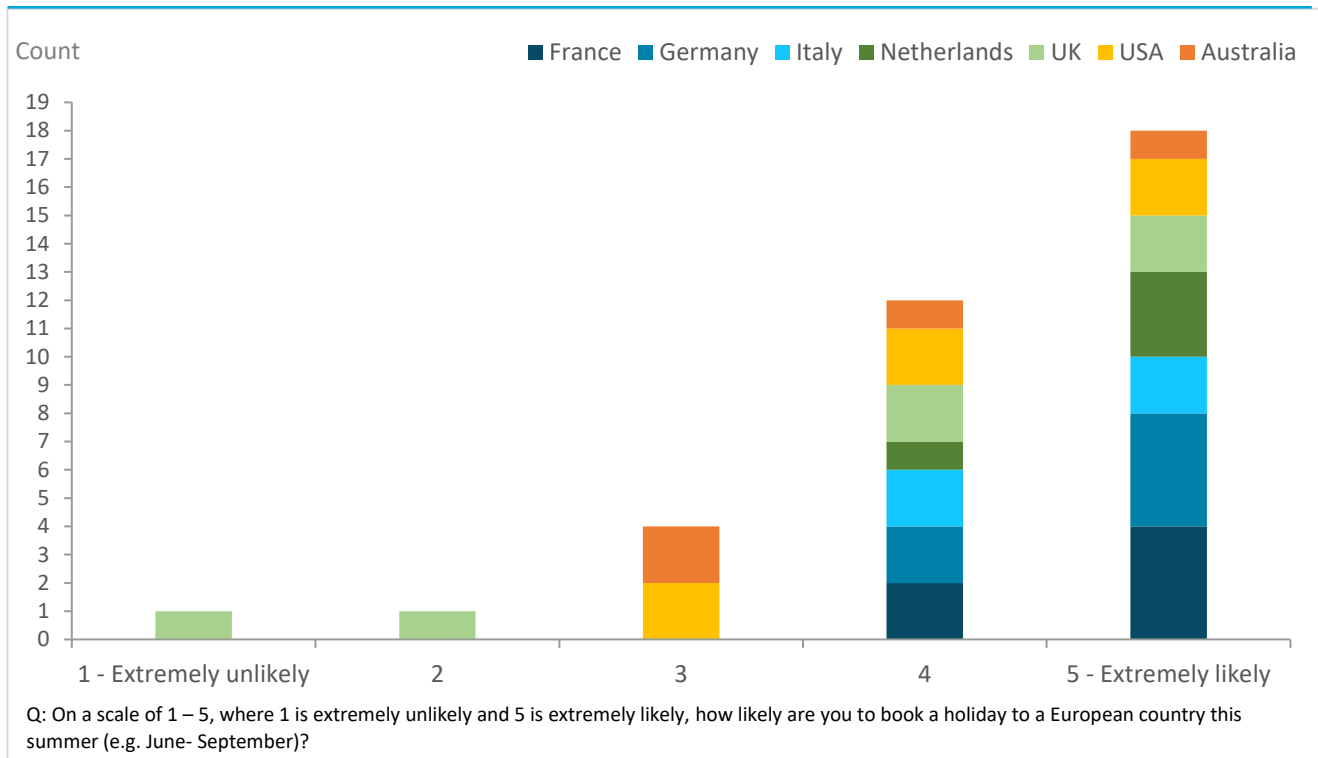> - Australian traveller, Nature and the Outdoors segment

> *"So, I see more possibility to travel freely around the world and easier transition through airports. At the airport in Adelaide, they have started experiencing the most traffic they have had since the pandemic started two years ago. Yesterday they had 25,000 people go through their airport. This instils more confidence provided that there are no new variants and that the restrictions stay down. It gives me more confidence, and perhaps I would raise the rating to a 4 or 5, but right now, it is uncertain, and that is why I have gone with a neutral 3."*

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[19] https://etc-corporate.org/reports/long-haul-travel-barometer-1-2022/

- Australian traveller, History and Ancestry segment

Graph 13: Likelihood of booking a holiday to a European country this summer

Count   ■France ■Germany ■Italy ■Netherlands ■UK ■USA ■Australia

Q: On a scale of 1 – 5, where 1 is extremely unlikely and 5 is extremely likely, how likely are you to book a holiday to a European country this summer (e.g. June- September)?
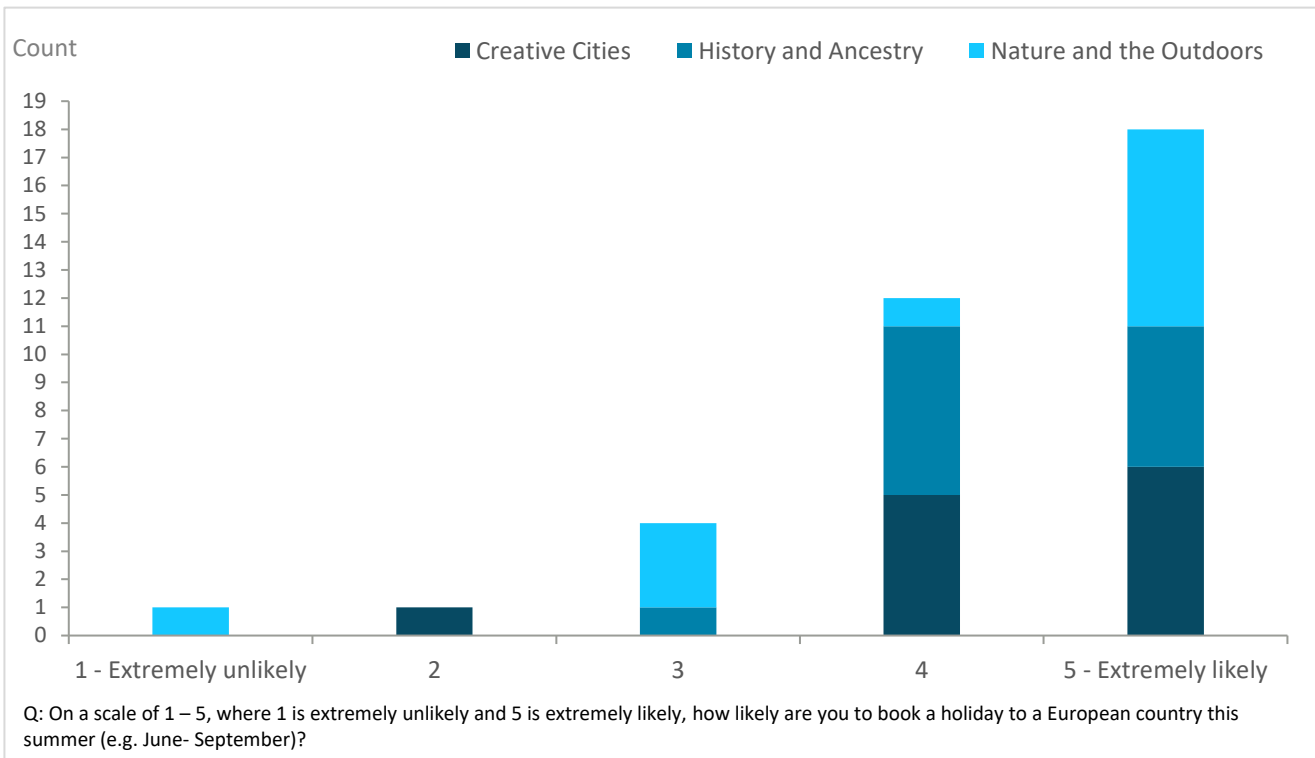
Looking at the likelihood of travelling to Europe this summer based on the monitored thematic experiences, the Nature and the Outdoors segment consists of both the most optimistic and the most reluctant individuals. With nature and outdoor activities being more easily available, it is surprising that most individuals answering with a neutral or negative response are in this segment. As mentioned on the previous page, the rationale for the person answering 1 in terms of likelihood to travel is not being convinced that the pandemic is under control when summer comes. Whereas two out of the three respondents in the Nature and the Outdoors segment answering 3 are the Australian travellers, with their reasons being that they are "remaining cautious about COVID-19". However, while one of them is more reluctant after a bad holiday, the other is more positive about travelling but will simply monitor the situation for now. The last person in the Nature and the Outdoors segment who gave a neutral answer regarding likelihood to travel is very keen to visit the Norwegian fjords but was unsure if the tours were already sold out. Thus, she keeps her response neutral until she gets to research the availability of trips to the fjords. If the tickets are available, she is certain to go.

> *"I would prefer going to the Norwegian fjords, but I am unsure if they are sold out. I will check up on that."*
> - American traveller, Nature and the Outdoors segment

Graph 14: Likelihood of booking a holiday to a European country this summer (by segment)

Q: On a scale of 1 – 5, where 1 is extremely unlikely and 5 is extremely likely, how likely are you to book a holiday to a European country this summer (e.g. June- September)?

As was a focus point of Chapter 1, the key characteristic of all those scoring the lowest in the likelihood to travel is that they live in a country where flying is the most convenient option for travelling abroad, i.e. Australia, the United Kingdom, or the United States, where the airport experience was considered a hurdle.

4.2 IMPACT OF THE COVID-19 PANDEMIC AND THE RUSSIA-UKRAINE CRISIS

This summer, no interviewees expect strict health and safety measures when arriving at a European destination. Most expect only minor health and safety measures.

"You have to accept certain measures, but I'll get used to them."
- German traveller, History and Ancestry segment

"It is hard to predict, but I think they will start to lift them."
- American traveller, Nature and the Outdoors segment

"It seems like everything is fading away. We are monitoring the situation, and it seems like that even if COVID is surging again, we will rely on the vaccinations, and if the hospitalisation is low, it may be acceptable to keep things normal."
- American non-international traveller, Creative Cities segment

 "I would expect the health and safety measures to be less restrictive. Especially during the summer months. Comparing with other respiratory conditions like the normal flu, common cold, and so on, there are way less of it during the summer months. Also, with the majority of the population being vaccinated, it may help."
- British traveller, History and Ancestry segment

Q: Do still expect strict health and safety measures in place?

Other respondents only expect the standard COVID-19 guidelines at the visited destinations, i.e. social distancing, better hygiene, wearing masks or just enhanced hygiene.

"I don't think so. I think all of that will disappear. […] I do not think there will be any difference compared to before the pandemic but a bit more hygiene."
- Australian non-international traveller, History and Ancestry segment

"You still have to be careful and use masks, keep distance and so on. Then I'm confident."
- German non-international traveller, Creative cities segment

"No, I do not expect any strict measures, but some measures would also give me peace of mind."
- British traveller, History and Ancestry segment

Among the Dutch interviewees, no one expects measures at the destination. Only one expects masks to be required on flights.

"No, it will be great to travel again. Perhaps a face mask on the plane, but no more than that."
- Dutch traveller, Nature and the Outdoors segment

The French interviewees hope that there will be no strict measures or at least that there will not be anything worse than now.

> *"I hope that the restrictions will go away, or at least they will stay like this."*
> - French traveller, History and Ancestry segment

> *"I am very optimistic about them (the measures) being gone. They will probably mostly be like a guideline."*
> - French non-international traveller, Creative Cities segment

As touched upon throughout the study, a few interviewees believe the pandemic will impact their travel expectations. British participants, who are not comfortable with the state of the pandemic, will travel domestically this summer, while an American respondent remains against all countries with any restrictions in place. Additionally, an American interviewee is currently in the process of booking a trip to Europe, but he remains cautiously optimistic about it working out.

> *"I am planning a vacation with my granddaughter for late June, and she has not made up her mind yet. So, it is mostly if COVID goes back up and we have to cancel again. I am cautiously optimistic.*
> - American non-international traveller, History and Ancestry segment

Interestingly, as briefly mentioned in Chapter 1, an Italian interviewee emphasises the pandemic's psychological impact on Italians, making them feel unsafe when travelling, and that it will take time for Italians to recover from the shock. Another Italian also mentions the uncertainty about planning a holiday, being afraid of potential new changes that may happen. However, they all rate 4 or 5 on their likelihood of travelling this summer.

> *"A lot of people will not feel safe travelling, psychologically speaking, even though the situation is more manageable. This pandemic has had a devastating psychological impact on the population. It will take a long time and proof of many positive experiences to make everyone feel safe again*
>
> - Italian non-international traveller, Creative Cities segment

> *"I feel unsure about planning a vacation as it is hard to predict if there will come any new changes."*
> - Italian non-international traveller, History and Ancestry segment

Lastly, as already covered in Chapter 3, the interviewees are not affected that much by the Russia-Ukraine crisis in terms of going on holidays, but mostly emotionally. Two respondents are affected in terms of their summer plans with an American participant who had been planning a trip from Germany to Poland but is now in the process of rescheduling to go from Germany to the Alps instead.

> *"We are changing our travel plans slightly this summer due to Ukraine. Originally, I found some cheap tickets to Munich, and we were gonna drive up to Berlin and go to Poland. Now we will go a little bit further away from that and maybe drive from Munich into the Alps."*
> - American non-international traveller, Creative Cities segment

The second respondent would have liked to go to Poland but will avoid it now due to the crisis, unless it ends before the summer.

"If the war was not going there [Ukraine], Poland most likely would have been the first choice. It is reasonable prices, good fun. My friends and I have been there and had a good time. If everything settles, I will definitely go there."
- British non-international traveller, Creative Cities segment

To sum up, the interviewees are confident about their plans for the summer season of 2022, with a few exceptions. Until the summer comes, there will be the possibility of a negative shock due to the pandemic, calling for the interviewees to be flexible and ready for change.

"We must be prepared to be more spontaneous and flexible."
- German traveller, History and Ancestry segment

"If something happens, you just roll with it and do not let it affect the fun you are having."
- American non-international traveller, Creative Cities segment

This uncertainty especially affects the Italian interviewees who are hesitant to plan too far ahead but who are still keen to travel.

"I hope that in the future, the planning of the trip will not be affected by these factors anymore. At the moment, it has become difficult to plan ahead for a trip. Last-minute trips have become the normality."
- Italian non-international traveller, Creative Cities segment

4.3 TOURISM PRODUCTS AND SERVICES

Looking at what changes in products and services interviewees would like the different sectors[20] to offer on their next trip, most are related to the habits acquired due to the pandemic. Of things not related to pandemic habits, flexible cancellation policies, better Wi-Fi to support hybrid working vacations (e.g. digital nomadism), and a European-wide service like Uber are mentioned. The flexible cancellation policies have been an ongoing theme in this study as interviewees overall have indicated that it has been a great initiative that they want to stay. Furthermore, a Dutch interviewee believes it could help stimulate travel confidence.

"I am really enthusiastic about the new cancellation policy. I think it must stay as a way to stimulate the travellers to book their holidays."
- Dutch non-international traveller, Creative Cities segment

An American interviewee would appreciate the flexibility connected to the policies as it would reduce the commitment, while a British participant sees it more in relation to hotels, where it is easier to change plans. He does mention that the policies have been changing in the UK, so for him, it will also depend on how flexible the policies will be in reality.

"The flexible cancellation policies are good. I really appreciate that as you can plan without committing too much."
- American non-international traveller, Creative Cities segment

"The flexible cancellation policies kind of depend on how flexible the policies are, as in the UK, it has not been consistent. Compared to a hotel, I can just cancel a few days before, which is not a problem, but with flights, it is another story."
- British non-international traveller, Creative Cities segment

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[20] The sector refers to transport, accommodation, tourism attractions, and restaurants.
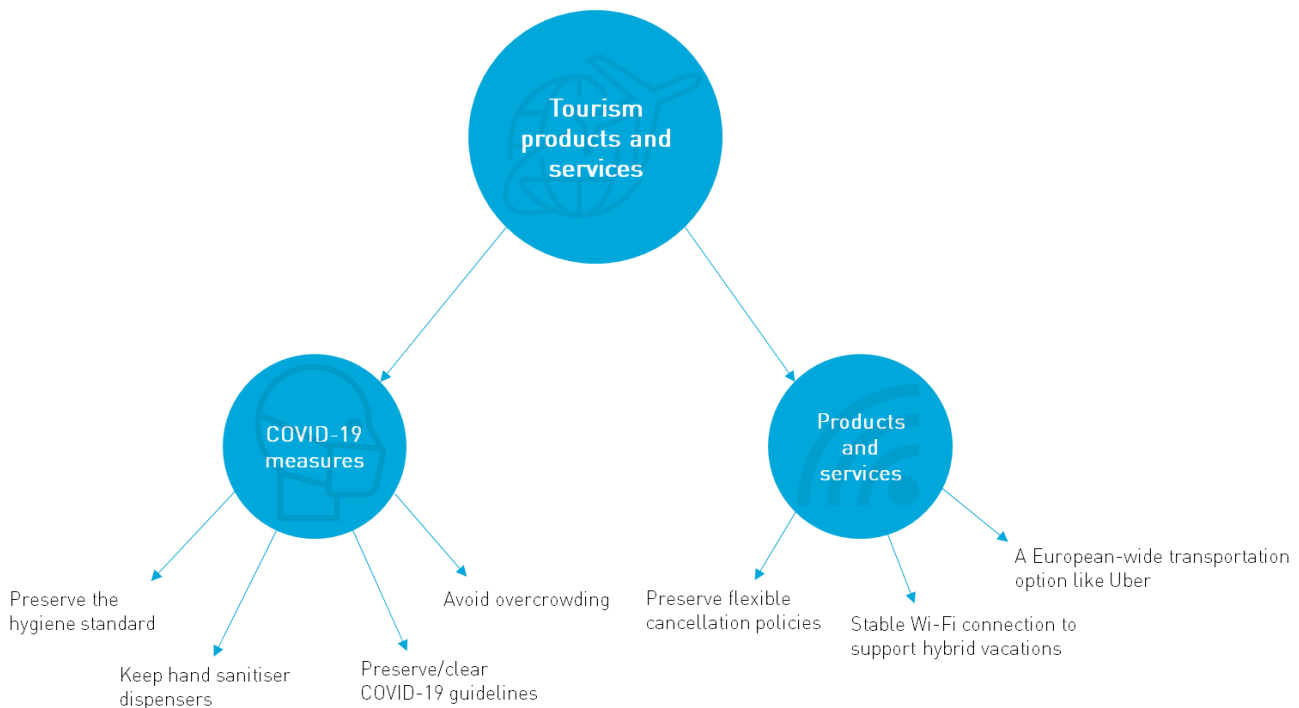
Q: What changes (if any) in tourism products and services offered by the sector, e.g. transport, accommodation, tourism attractions, experiences, restaurants, would you like to see on your next trip?

The second product is improved Wi-Fi. The wish for this service is derived from the increased interest in remote working during the pandemic. The rationale is that remote working has become more normal; thus, a good and stable Wi-Fi connection has become really important if you wish to work remotely in Europe.

> *"I would like to work more hybrid when on vacation, so good and steady internet is really important. Because of COVID, remote working is more and more normal, so working remote in Europe should be facilitated in the best possible way."*
> - Dutch traveller, Nature and the Outdoors segment

Lastly, an interviewee thinks it would be great to have a kind of European organised network of drivers similar to Uber, but where the service is provided by the European countries. Thus, resulting in a standardised solution across all the European countries.

> *"Sometimes travelling by public transport is demanding. It would be great if there is a possible way to work hybrid with that kind of logistics. For example, a sort of Uber-service provided by the European countries."*
> - Dutch traveller, Nature and the Outdoors segment

The rest of the desired products and services complement the obtained habits from the pandemic with enhanced cleaning/hygiene from the sector, the availability of hand sanitiser dispensers, and preserving or presenting clear COVID-19 guidelines.

> *"It would be nice keeping the hygiene service like it was during the pandemic."*
> - French traveller, Nature and the Outdoors segment

> *"I would not mind if the hotels kept the high cleaning standards."*
> - Italian non-international traveller, History and Ancestry segment

> *"The disinfection dispenser around the cities gives a good feeling when visiting."*

- German traveller, History and Ancestry segment

"I would like for masks, distancing, and sanitising stations to stay."
- Australian traveller, Nature and the Outdoors segment

"One thing I picked up in Thailand is that every time you enter a shopping mall, you will get a temperature check. It is a simple thing, but it may help safeguard the general population some more. Some restaurants and hotels did do it as well."
- British traveller, History and Ancestry segment

Two interviewees express that they are confident that everyone is doing what they can to make tourists feel safe, and that is all they can ask for.

"I do not think that the destinations can do much to boost my confidence. I am sure everyone does everything they can, and if there is a massive outbreak, I just need to see them give some advice and that people are sensible."
- British non-international traveller, Creative Cities segment

"I know that everybody there, all the restaurants, are doing whatever they think they can do and is necessary. That is all I can expect from them."
- American non-international traveller, History and Ancestry segment

4.4 SUMMARY

If the interviewees were to travel to Europe this summer, the destinations considered by most are primarily Mediterranean countries (e.g. Spain, France, Italy, and Greece), together with Germany. The expected types of destinations based on thematic experiences would be Culture and Heritage, Nature and Outdoors, and City Breaks.

The likelihood of the respondents booking a holiday to a European destination is very high, with 80% of the interviewees stating that they are either likely or extremely likely to book.

Arriving at a European destination, the interviewees do not expect to be greeted by strict health and safety measures. They rather expect only minor measures with the more common COVID-19 guidelines of social distancing, better hygiene, and the requirement of wearing masks at certain locations.

The pandemic is not expected to severely impact travel expectations for the summer. Likewise, the Russia-Ukraine crisis does not seem to be too concerning in relation to interviewees' travel plans. However, travel to countries in Eastern Europe – especially those bordering Russia and Ukraine – might decline.
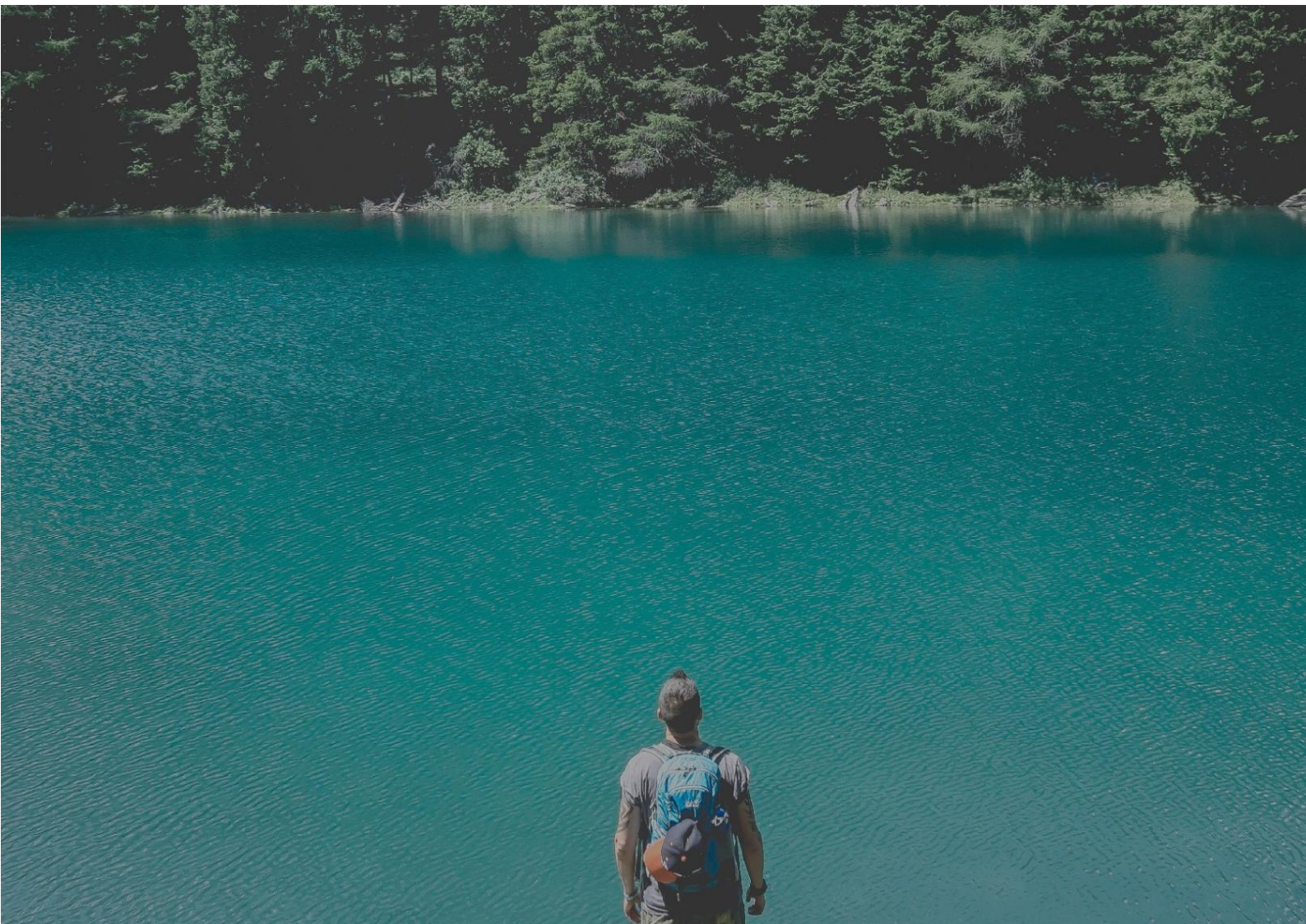
Tourists would like European destinations to preserve the enhanced hygiene standards obtained throughout the pandemic – such as by keeping hand sanitiser dispensers available for visitors – and to continue offering flexible cancellation policies to reassure tourists and boost their travel confidence.

CHAPTER 5

RECOMMENDATIONS FOR DESTINATIONS

5. RECOMMENDATIONS FOR DESTINATIONS

Travel planning

- Destinations can promote last-minute offers to help accommodate the needs of tourists deciding not to plan a long time in advance.
- Neighbouring countries could partner and develop pan-European thematic marketing campaigns and experiences to attract visitors travelling closer to home.
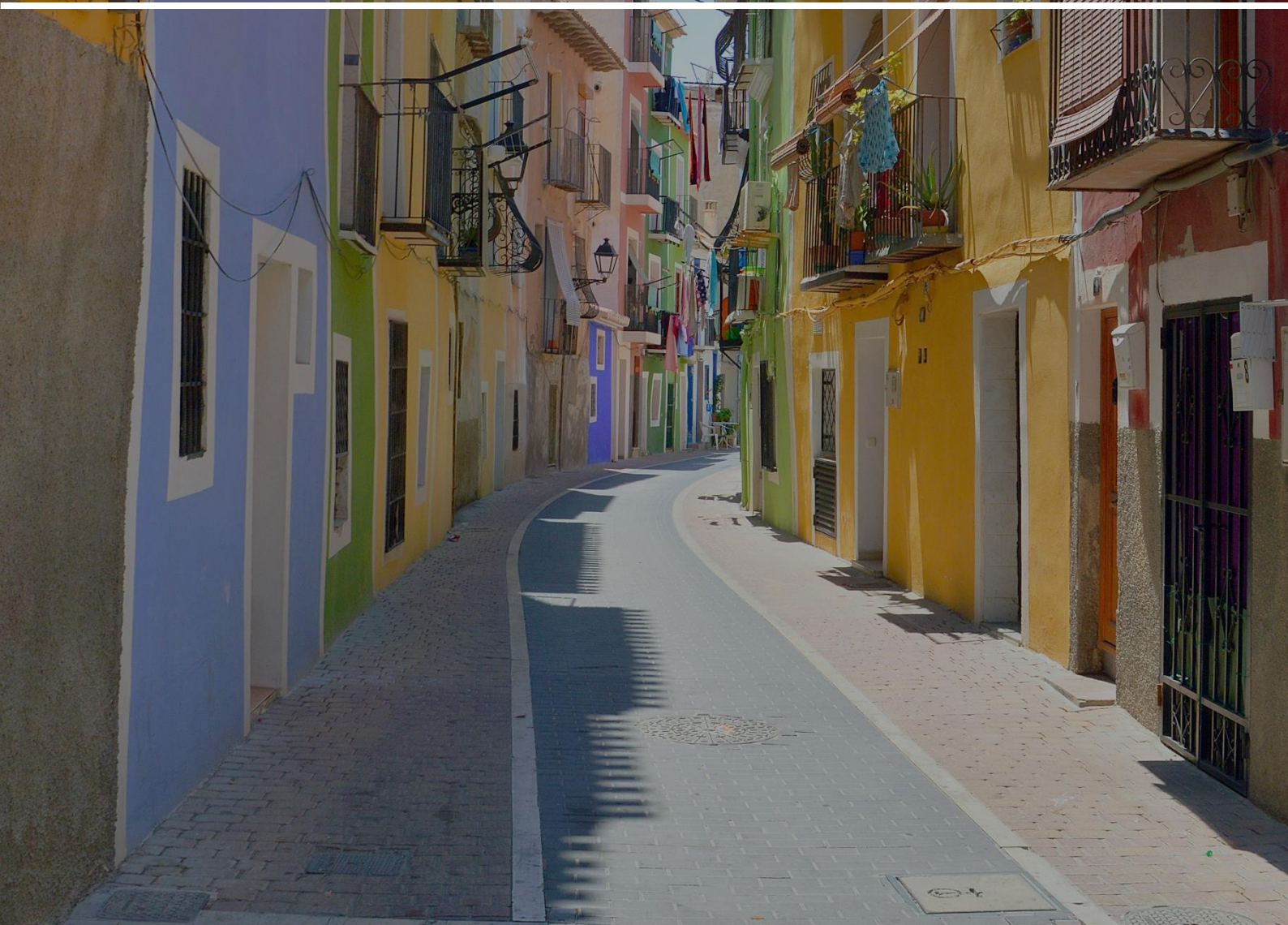
Travel to the destination

- Flexible cancellation policies for accommodation and flights are highly in demand as a service interviewees would like to remain.
- Destinations can promote alternative types of transport for travelling to accommodate tourists who would like to avoid taking flights or travel more environmentally friendly, taking advantage of the desire to travel closer to home.

In-destination experiences and perceived safety

- Accommodation establishment and transportation should showcase how they comply with basic protective measures against COVID-19 including hand hygiene and physical distance. It is encouraged to keep up the enhanced hygiene standards and have dispensers for hand sanitiser available and regularly refilled.
- In case strict travel restrictions are reimposed due to the pandemic's evolution, a common agreement on COVID-19 rules and regulations among European destinations can help keep the travel sentiment up.
- Promoting sites and attractions in lesser-known areas or off-the-beaten-track to disperse tourists away from the most popular tourist landmarks.
- Promoting outdoor and nature activities for those still afraid of COVID-19 infection.
- Continue the use of technology like pre-booked tickets to reduce queue lengths and contactless solutions.

APPENDIX

APPENDIX

A. SEGMENT PROFILES

SEGMENT 1	**PASSION POINT**	**Creative Cities (Creative Industries and Contemporary Arts)**
	PROFILE OF THE TARGET GROUP	Community of city life enthusiast who share a passion for contemporary arts, creative industries (architecture, fashion, design and crafts), vibrant urban lifestyle and vivid cultural scene. They seek new experiences to enrich their life and establish new relationships with like-minded people in the places they visit. They have the need to indulge in new cultures and a desire for excitement, authentic and out of the ordinary experiences. They want to experience everyday local life of the destination by interacting with the place, its people and customs. They grant attention to the atmosphere of the destination they visit, defined by the vibrancy of the creative and cultural offer. A large proportion of this community are highly educated young professionals with a high socio-economic status. Spring and autumn are their preferred seasons for travelling.
SEGMENT 2	**PASSION POINT**	**History and Ancestry**
	PROFILE OF THE TARGET GROUP	Explorers of cultural identity and roots with a particular interest in significant events that marked the world's and/or their personal history. This includes old and new generations who are interested in history and engaging in new deep experiences that connect to today's world. They enjoy exploring aspects relating to the cultural heritage, historical ties and ethnic identity of the destinations they visit. This community tends to have higher income in comparison with conventional long-haul travellers.
SEGMENT 3	**PASSION POINT**	**Nature and the Outdoors**
	PROFILE OF THE TARGET GROUP	Community of immersive explorers who believes in the importance of making time to spend in nature and is most often activity driven. Nature is an important element in their lives. They have a strong desire to connect more with nature, but their working pattern and urban lives often prohibits this. They seek to fulfil their connection with nature through tourism and recreational experiences. They favour slow, immersive journeys through wild places and natural spaces in search for health and well-being. In a globalised world where people feel they have seen everything, they value original nature, clean environments, unbuilt landscapes and quietness. They are early adopters which means they are generally more willing to try new destinations, activities, and travel products. A large proportion of this community are high-value customers who are willing to pay a premium for exciting and authentic experiences.