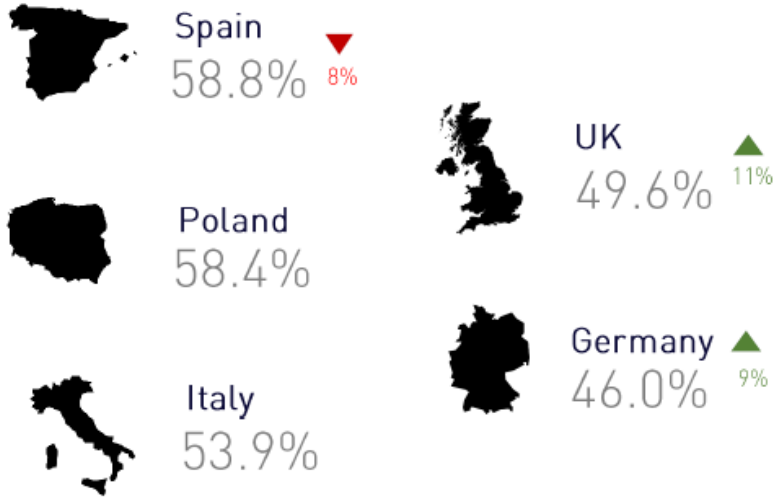


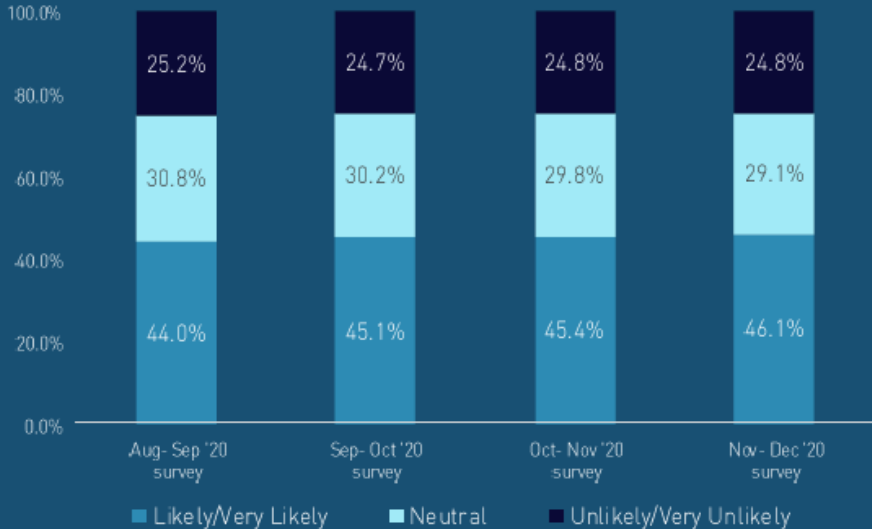
While COVID-19 vaccines are on rollout, the share of respondents planning to resume travel after a vaccine/treatment is found remains close to 46%



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

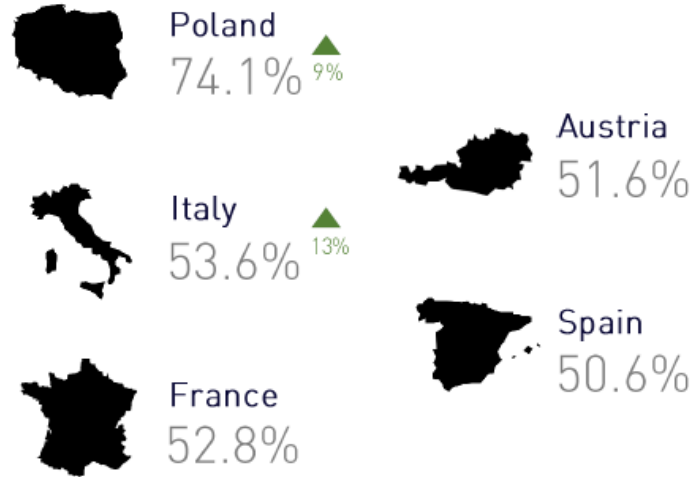


Intention to re-schedule a pre COVID-19 trip immediately after a treatment/ vaccine is found



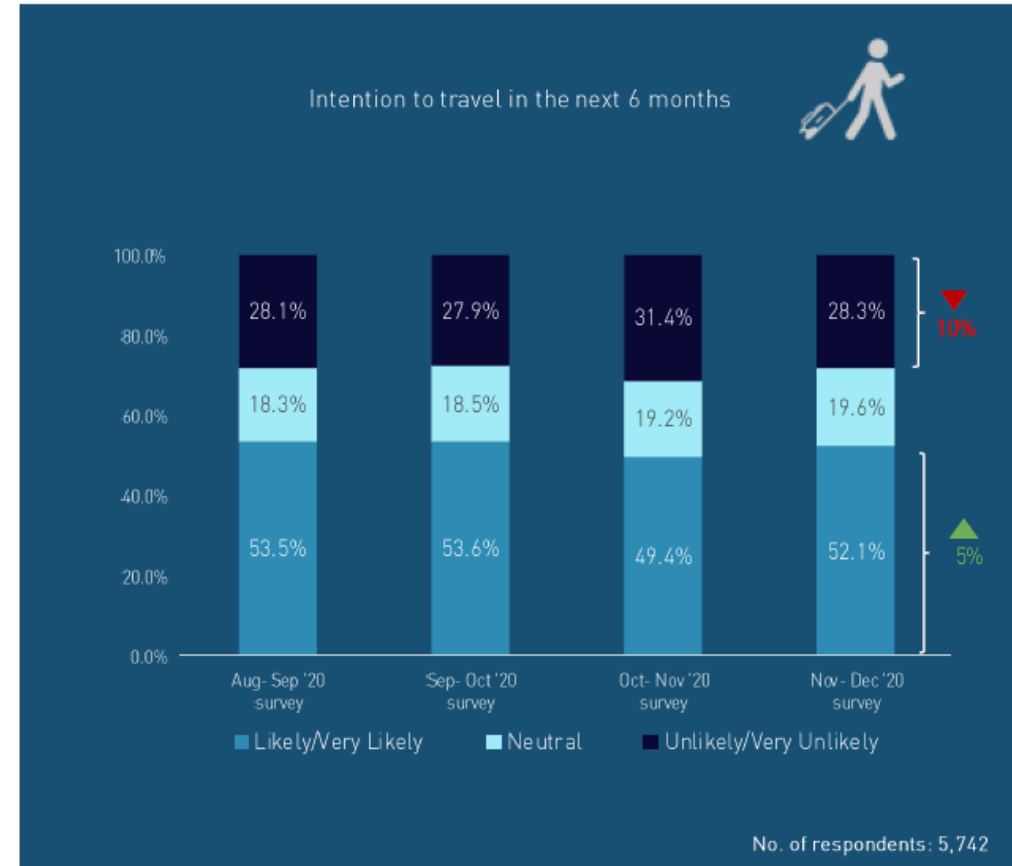
The share of respondents planning to travel in the coming 6 months increases by 5% compared to wave 3, providing a positive outlook for spring and summer 2021

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



13

Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

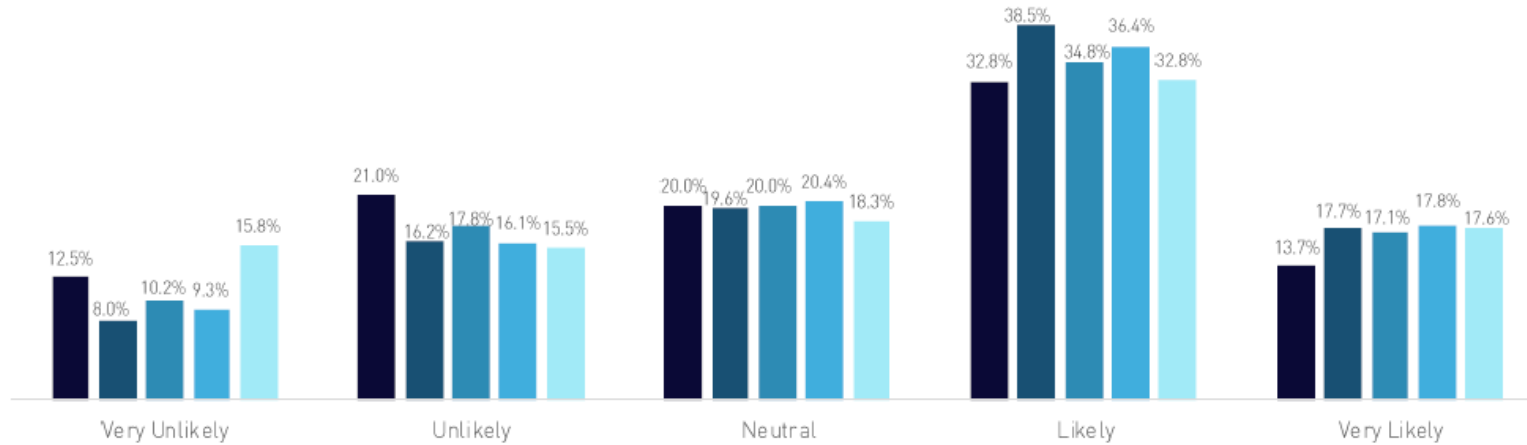


Respondents aged 25-34 are currently the most eager to take a trip, while Gen Z respondents (aged 18-24) remain less likely to travel



45% of respondents aged 55 and above do not know yet when they will travel next compared to an average of 34% among the other age groups

Intention to travel in the next 6 months by age group



- 18-24
- 25-34
- 35-44
- 45-54
- >=55

Nov-Dec '20 survey

Europeans still putting leisure as the first reason to travel, with visiting friends and relatives in second


Top 3 markets to resume leisure travel

 Italy
69.2%

 UK
68.1%

 France
67.9%


Top 3 markets to resume business travel

 Switzerland  48%*
15.7%

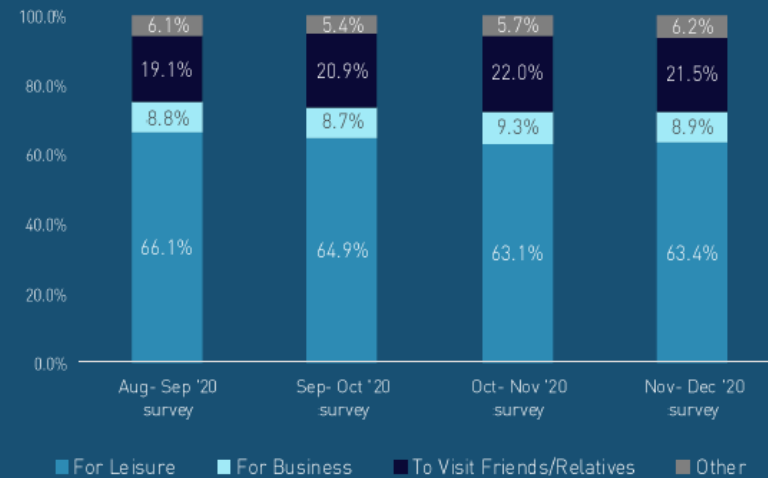
 Germany
12.6%

 Spain
12.6%

* Please use for reference only due to the low number of respondents (n: 21)

18 Q8. For what reason are you most likely to travel within Europe next?

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

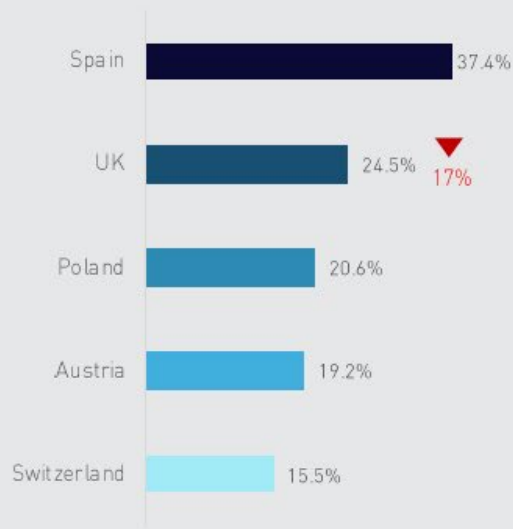


No. of respondents: 2,992

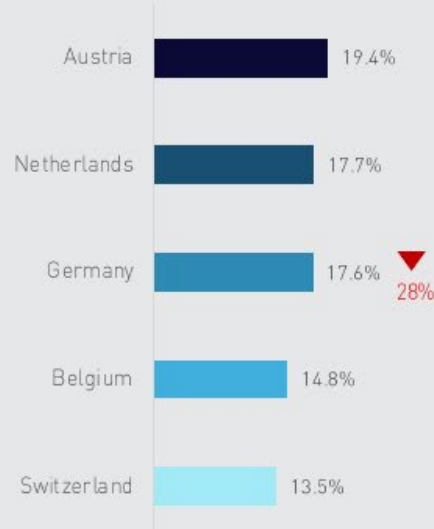
Places with a city break or cultural offering could more easily attract Spaniards and Italians respectively; while destinations offering outdoor & nature experiences could be more appealing to central European and Benelux markets



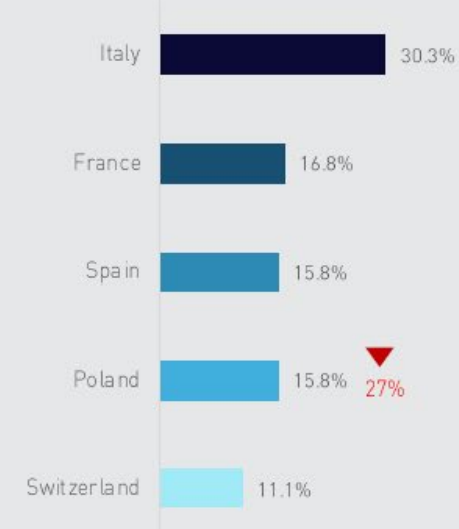
City Break



Nature & Outdoors



Culture & Heritage



How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 37.4% of respondents from Spain are most likely to undertake a city break trip

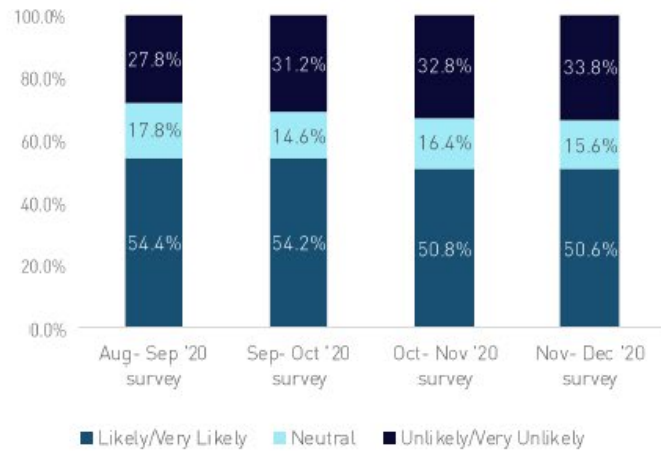
No. of respondents: 5,742

SPAIN

Spaniards are now the most uncertain market regarding the exact timing of their next trip - 45% of respondents compared to the European average of 36%



Willingness to travel in the next 6 months



Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

When will Spaniards travel?



Q9. When are you most likely to go on your next trip either in your country or within Europe?

For specific dates please refer to [slide 10](#)

Where will Spaniards travel within the next 6 months?



Q10. Where do you plan to travel in the next 6 months?

Travel Trends 2021

1

Go big (near or far) or stay home: The year travel dreams come true



With pent up demand from 2020, and realizing how quickly travel can come to a halt, travelers are likely to gravitate to 'big idea' or 'bucket list' trips that can vary from a three-hour road trip to an intercontinental flight.

2

Nomadic travel: Embracing work from anywhere



A newfound employee perk is the ability to work from anywhere. With Wi-Fi and a webcam, we can work from countries around the globe. Beach, mountains, city, country – the world is our "office" in 2021.

3

The loyalty shift: Better service for all



Before COVID-19, consumers racked up points and miles which often shaped the level of service and quality they experienced. But now 40% of tourists say they would favor airlines, airports and hotels with higher health and safety standards. In 2021, we'll see safety and cleanliness as new currencies for earning loyalty.



4

Swipe right on tech: Touchless tech will build traveler confidence



According to Amadeus' Rethink Travel Global Survey, more than 4 in 5 travelers said technology would increase their confidence to travel in the next 12 months. Mobile applications, contactless check-ins and rapid-result COVID-19 testing in airports will be the key to unlock travel.

5

Travel agents: Don't leave home without one



40% of global travelers expect their travel agents to be on hand to problem solve and provide recommendations. 2021 could be the year that travel agents shift in perception from a luxury to a necessity.

6

Travel with an impact: Smaller footprints & bigger hearts



In 2021, travelers' wanderlust will be stronger than ever – it will be a year of renewal and reconnection with a mindfulness of how fragile life can be. People will be more conscientious about how they travel, aiming to minimize the footprint of their journey and make a positive impact.