



Travel Trends 2021

Key Survey Insights for Leisure Travel: Cross-national and France

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Sebastien Vincent

Director for Leisure, Travel and
Transportation in France

[Sebastien.vincent@simon-
kucher.com](mailto:Sebastien.vincent@simon-kucher.com)

Dario Sangiovanni

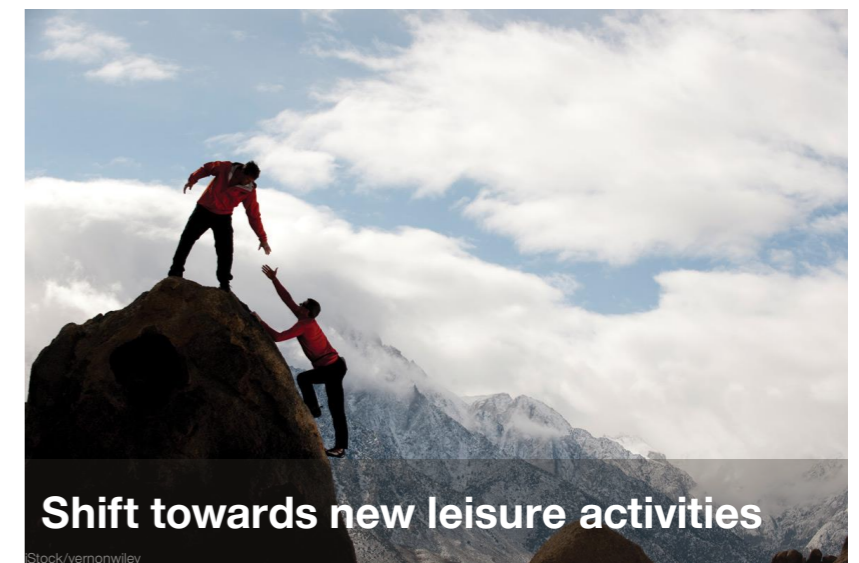
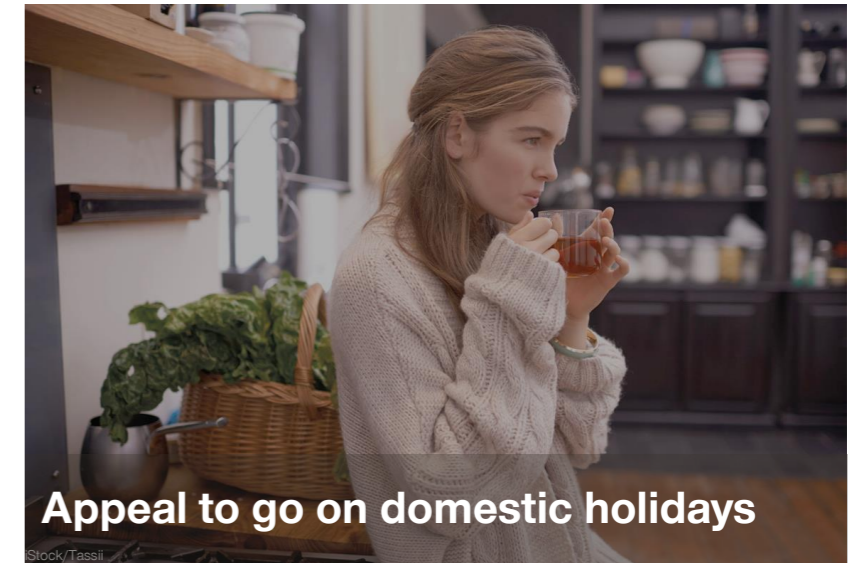
Director for Leisure, Travel and
Transportation in France

[Dario.sangiovanni@simon-
kucher.com](mailto:Dario.sangiovanni@simon-kucher.com)

www.simon-kucher.com

The travel and leisure industries need to consider many shifts in consumer behaviour

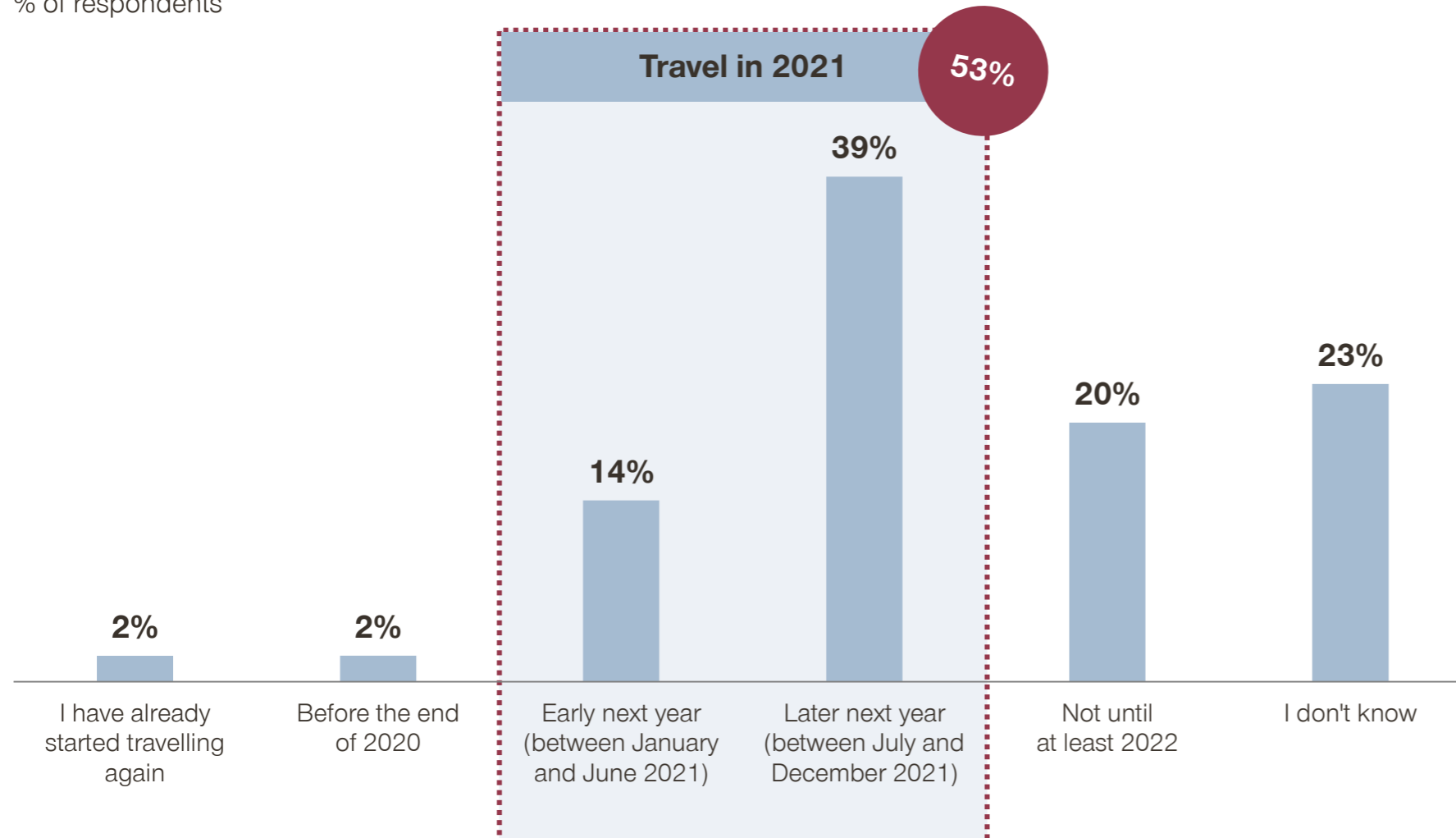
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Strategy & Marketing Consultants



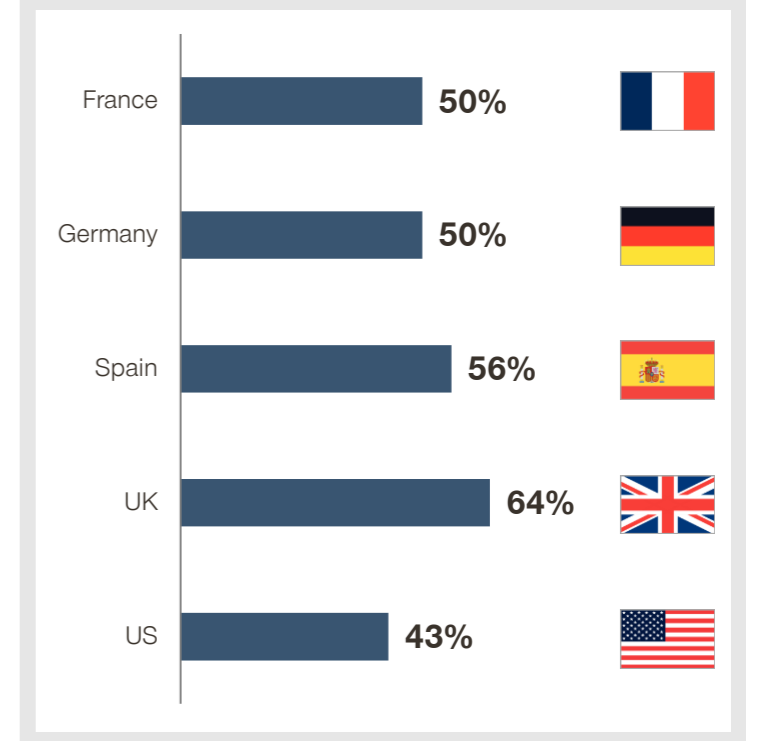
53% of cross-national respondents expect to travel again for leisure in 2021 - British and Spanish respondents appear to be the most optimistic travelers

When do you think you will start travelling (multi-day, international trip) for leisure purposes again?

% of respondents



Percentage that expect to travel again in 2021

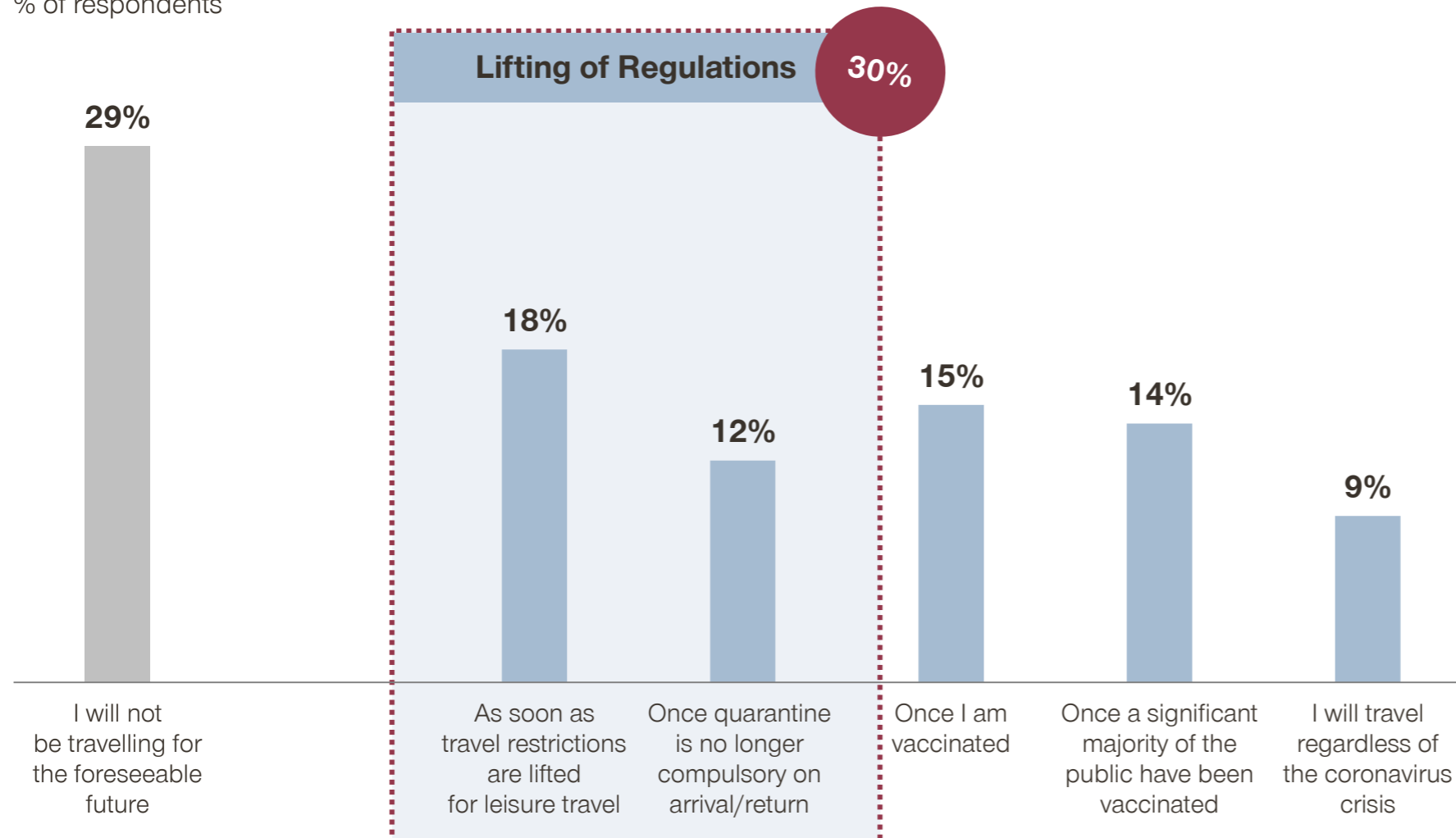


Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907, n(Germany)=888, n(France)=417, n(Spain)=808, n(UK)=922, n(US)=872

29% of cross-national respondents do not expect to go on vacation soon, lifting of regulations and vaccination number one triggers for travelling again

What would prompt you to travel abroad for leisure purposes (multi-day, international trip) again?¹

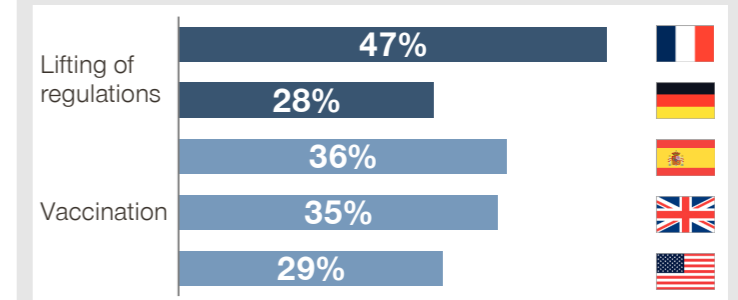
% of respondents



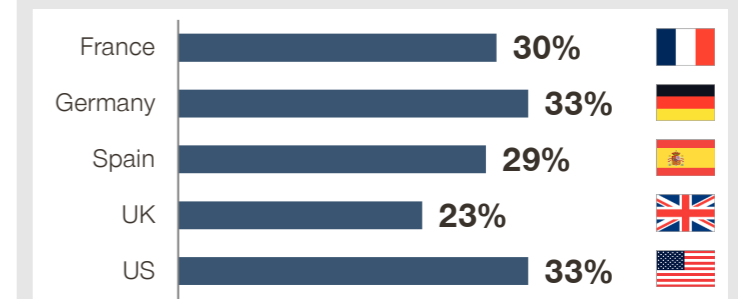
1) The remaining respondents have chosen the option "other"

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907, n(Germany)=888, n(France)=417, n(Spain)=808, n(UK)=922, n(US)=872

#1 triggers to travel internationally

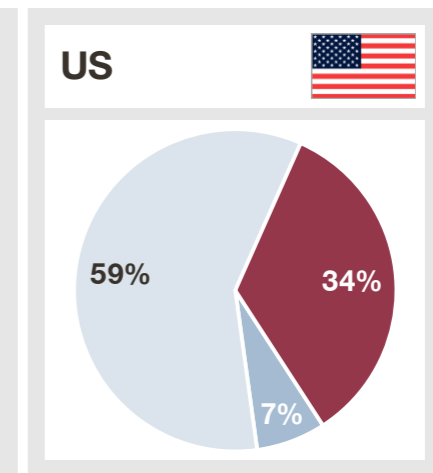
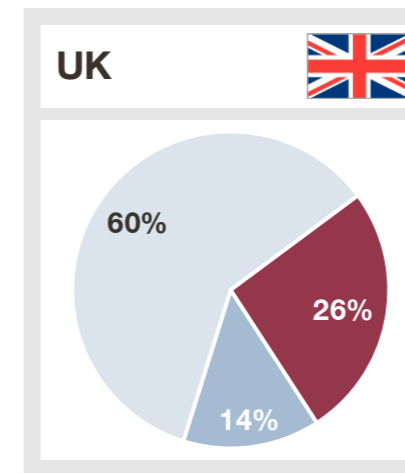
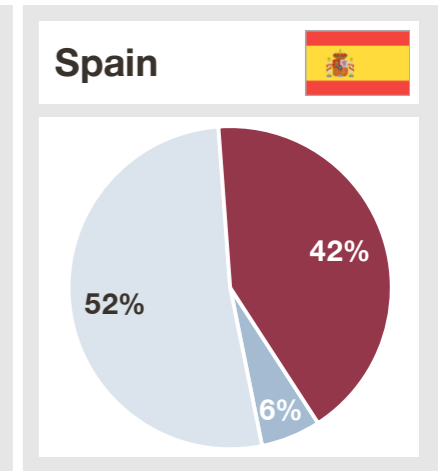
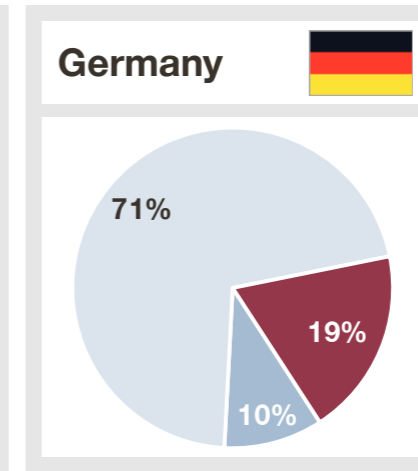
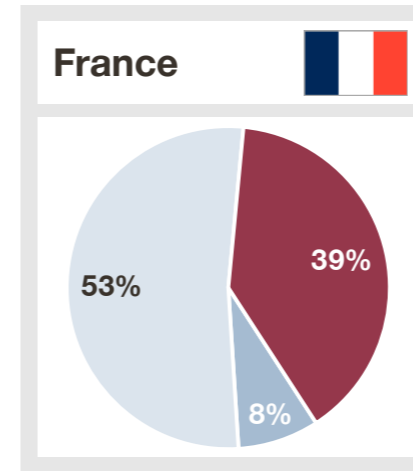
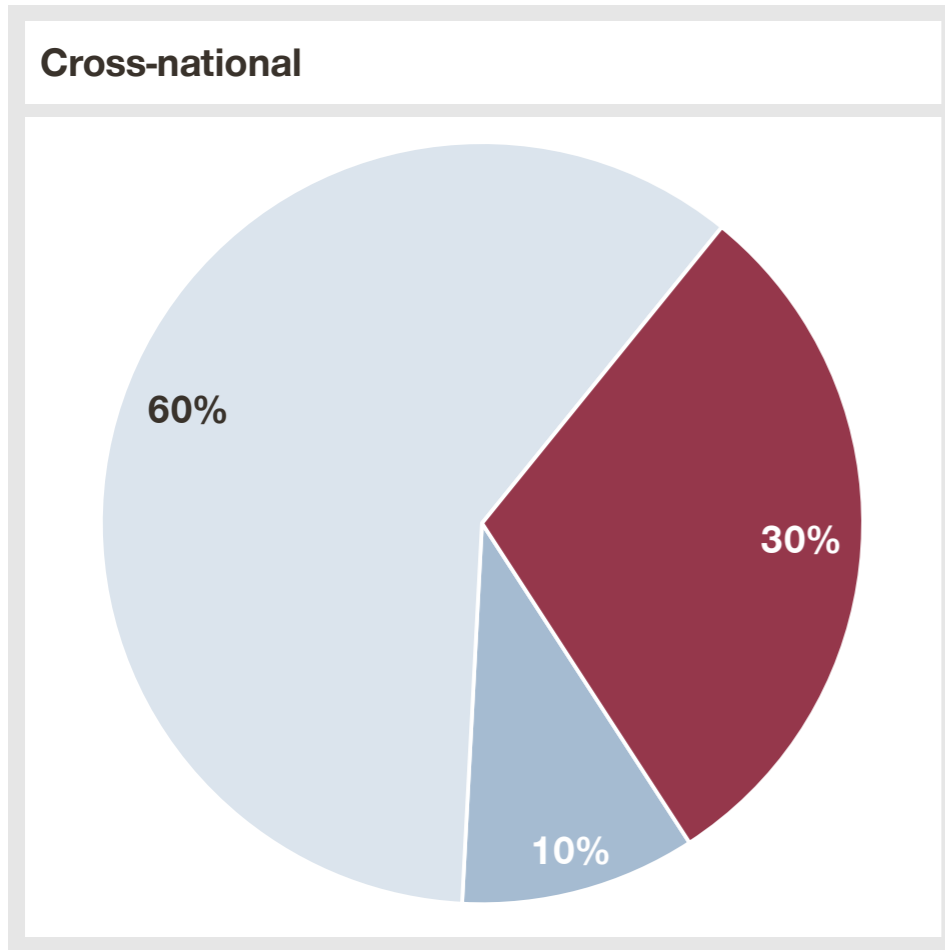


Percentage that will not be travelling for foreseeable future



30% of cross-national respondents will decrease travel budget after the pandemic, lowest travel budget decline expected for Germany at only 19%

Expected impact of pandemic on travel budget¹



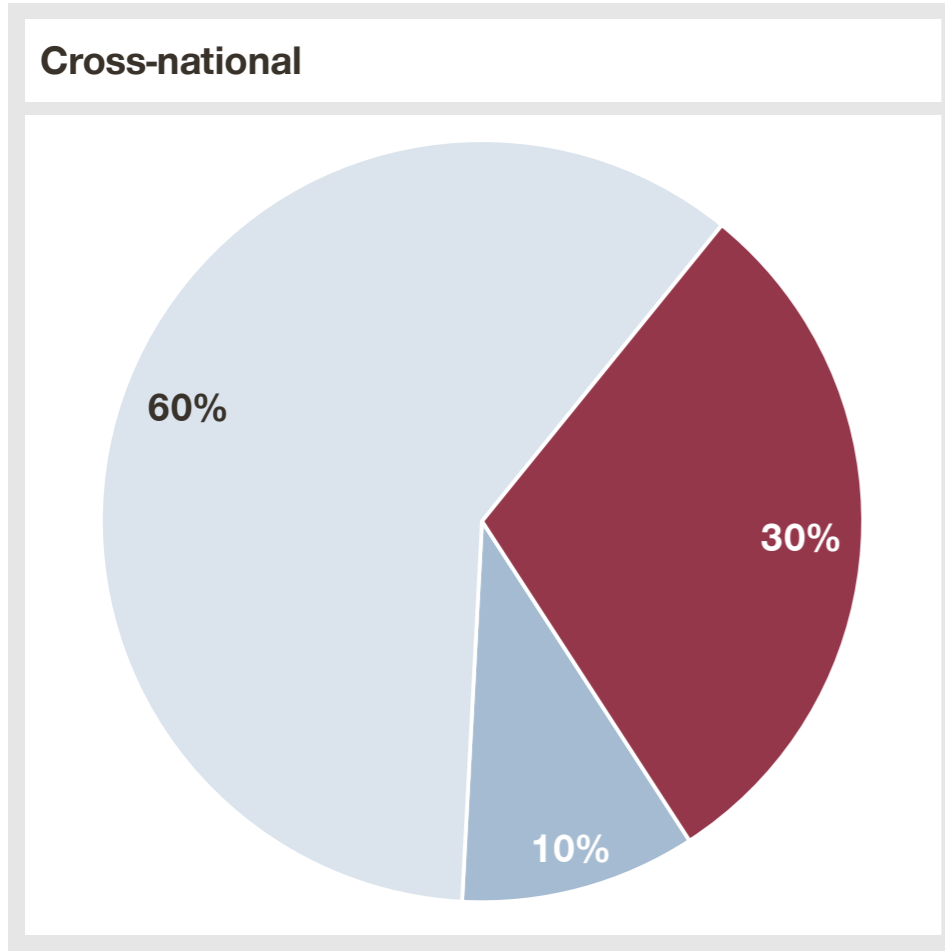
■ Increase of budget ■ Budget will stay the same ■ Reduction of budget

1) Q4a. Thinking about your next big trip, has the pandemic affected your budget for travel?

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907, n(Germany)=888, n(France)=417, n(Spain)=808, n(UK)=922, n(US)=872

Main reason for reduction in travel budget is uncertainty about income and employment status followed by insecurity around cancellations

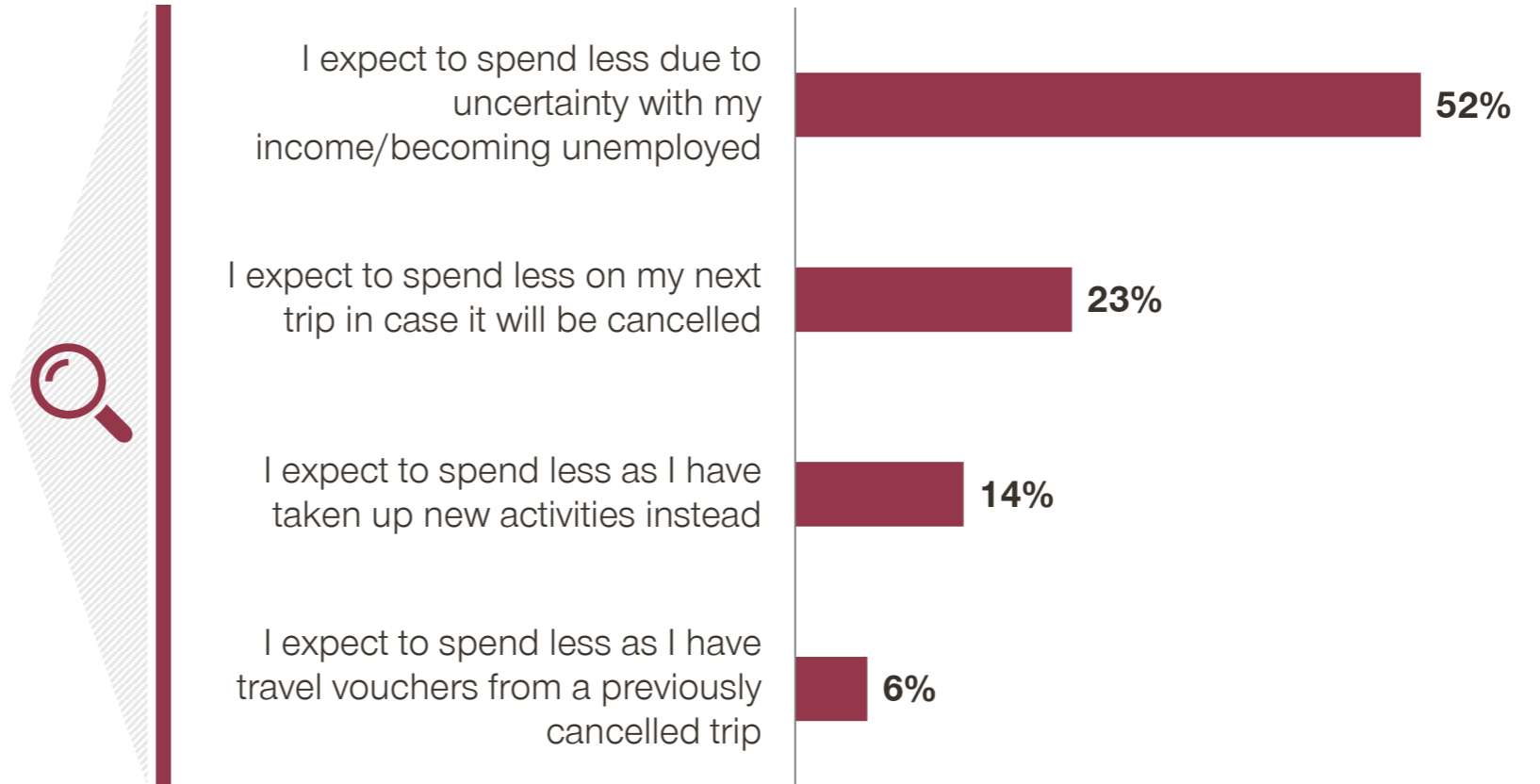
Expected impact of pandemic on travel budget¹



■ Increase of budget ■ Budget will stay the same ■ Reduction of budget

Reasons for decreased travel budget²

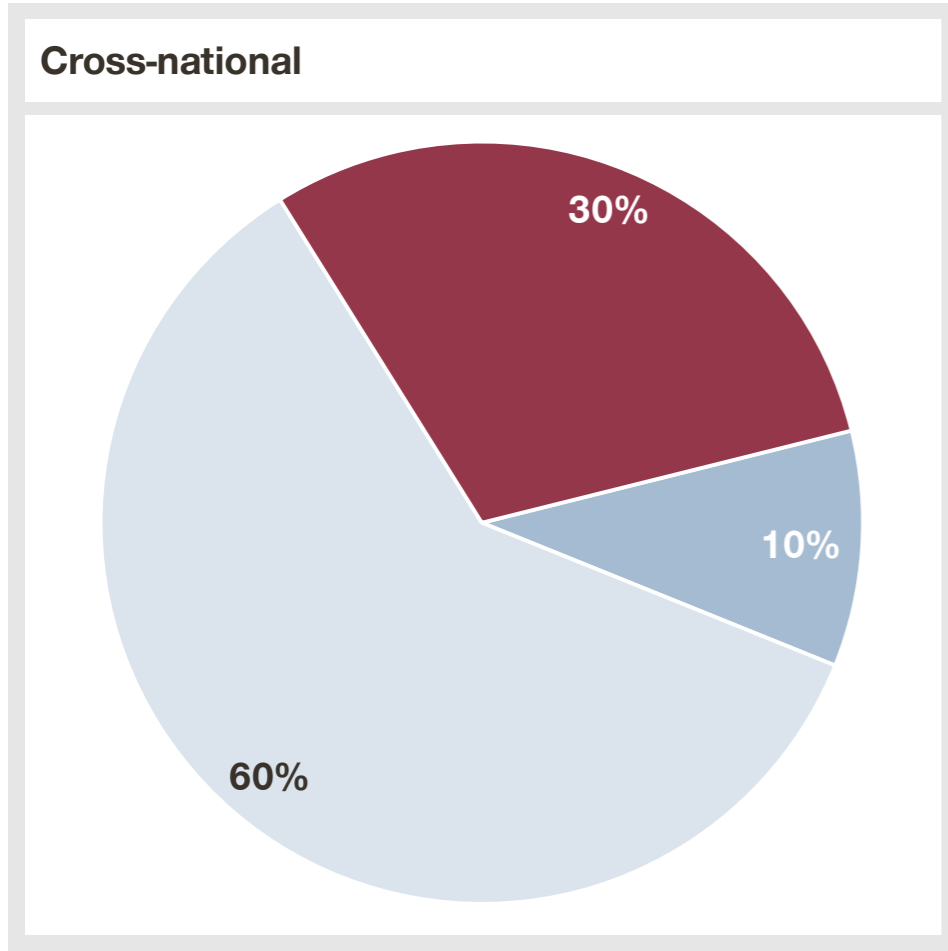
% of respondents (multiple choices possible)



1) Q4a: Thinking about your next big trip, has the pandemic affected your budget for travel?; 2) Q4c: Why has your budget for travel decreased for your next big trip? (n=1,206)
Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907

10% of cross-national respondents plan to increase travel budget, mixed picture between more frequent travels and one longer trip

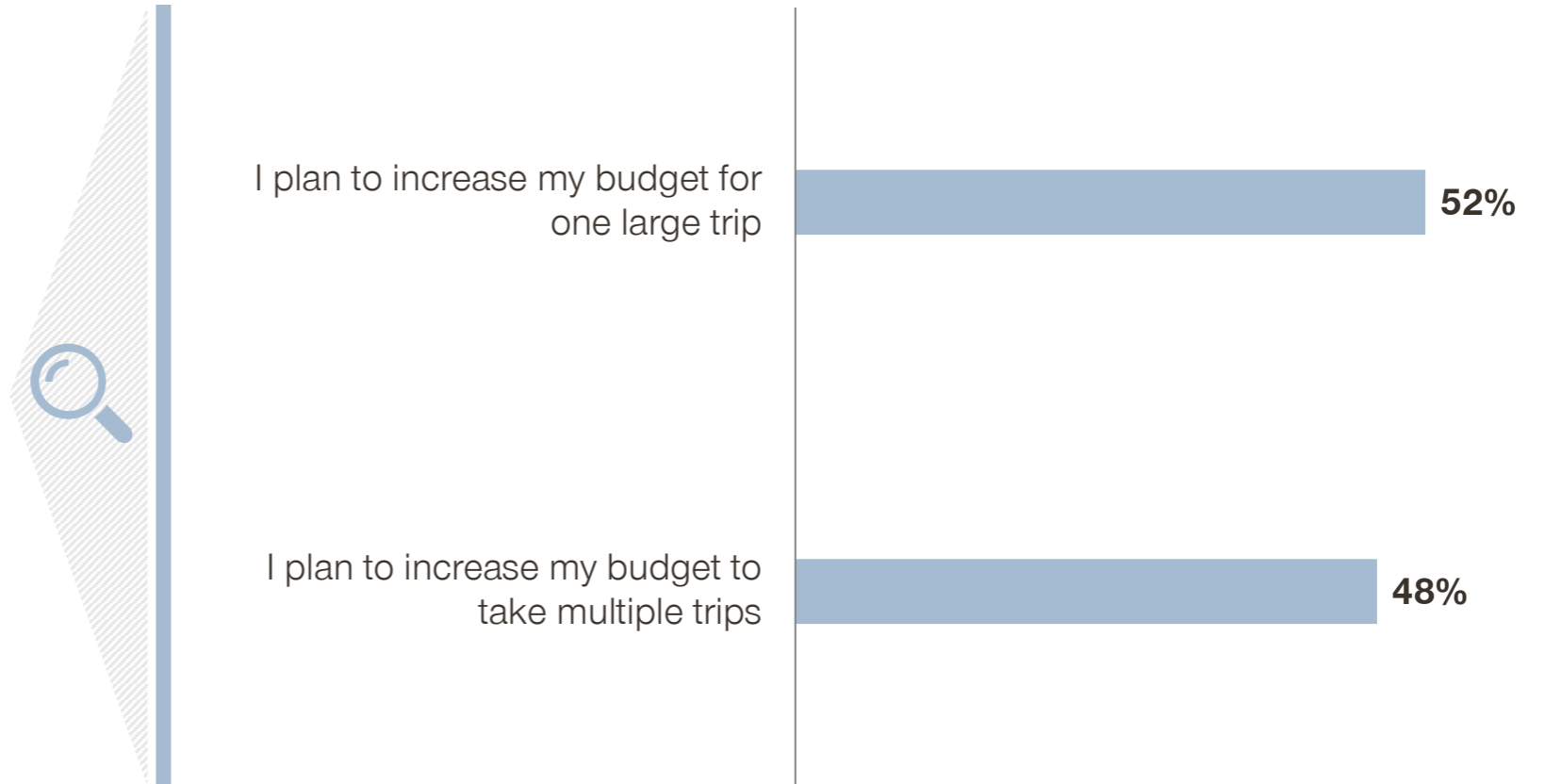
Expected impact of pandemic on travel budget¹



■ Increase of budget ■ Budget will stay the same ■ Reduction of budget

Do you plan to spend more on a single trip or across multiple trips?²

% of respondents



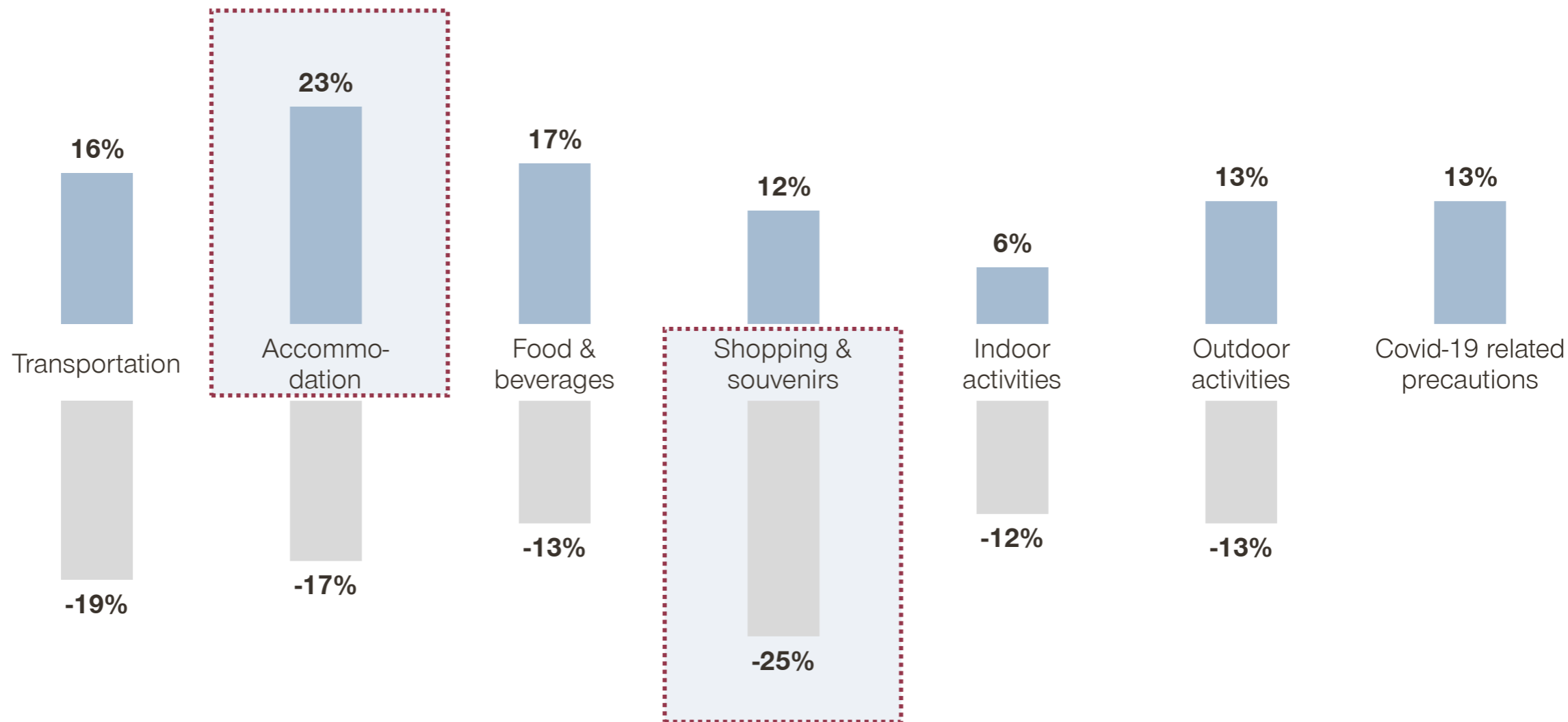
1) Q4a. Thinking about your next big trip, has the pandemic affected your budget for travel? 2) n=355
Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907

Increased budget mainly for accommodation while strongest decrease in budget for shopping and souvenirs

% of respondents (multiple choices possible)

Respondents that increase travel budget will spend more on...

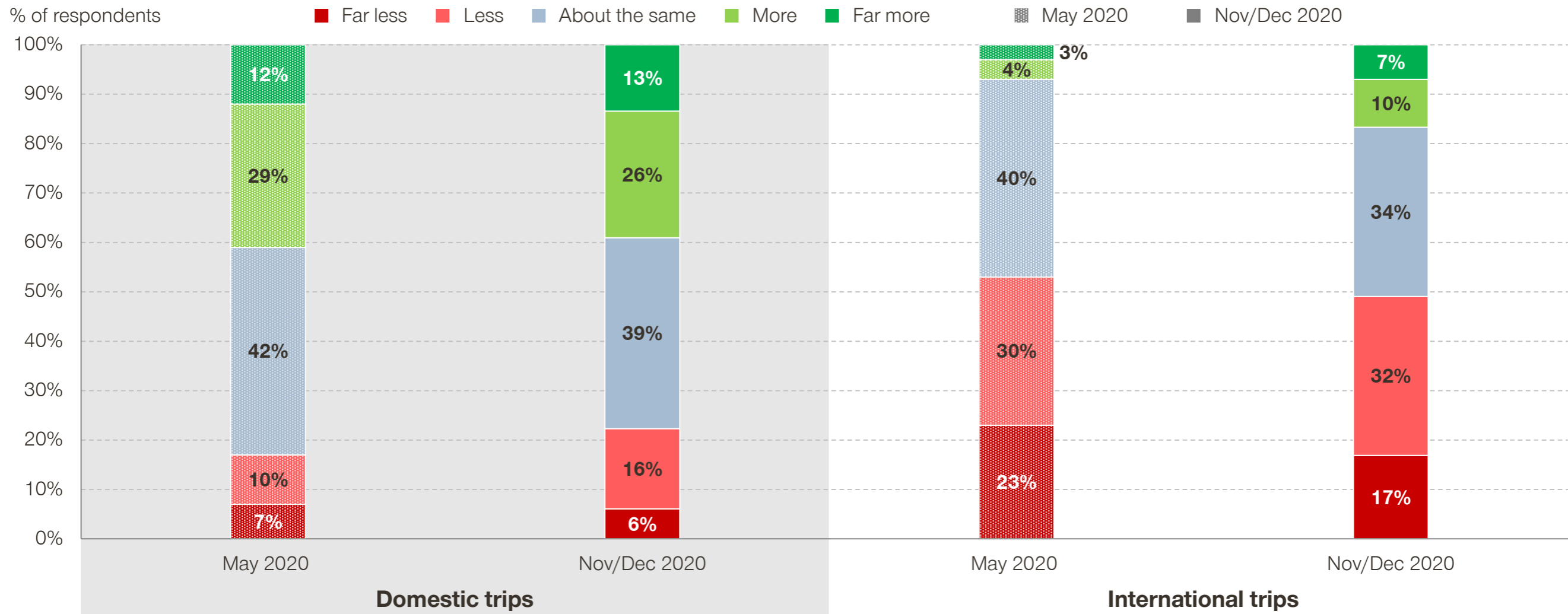
Respondents that decrease travel budget will spend less on...



1) Q4d: What do you think you will spend more money on for your next trip? (n=355) 2) Q4e: What do you think you will spend less money on for your next trip? (n=1,206)
Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907 – the remaining respondents will not change their travel budget after the pandemic

Industry needs to continue preparing for 'staycation' tourism given 39% more domestic travel; international trips improving versus results from May 2020

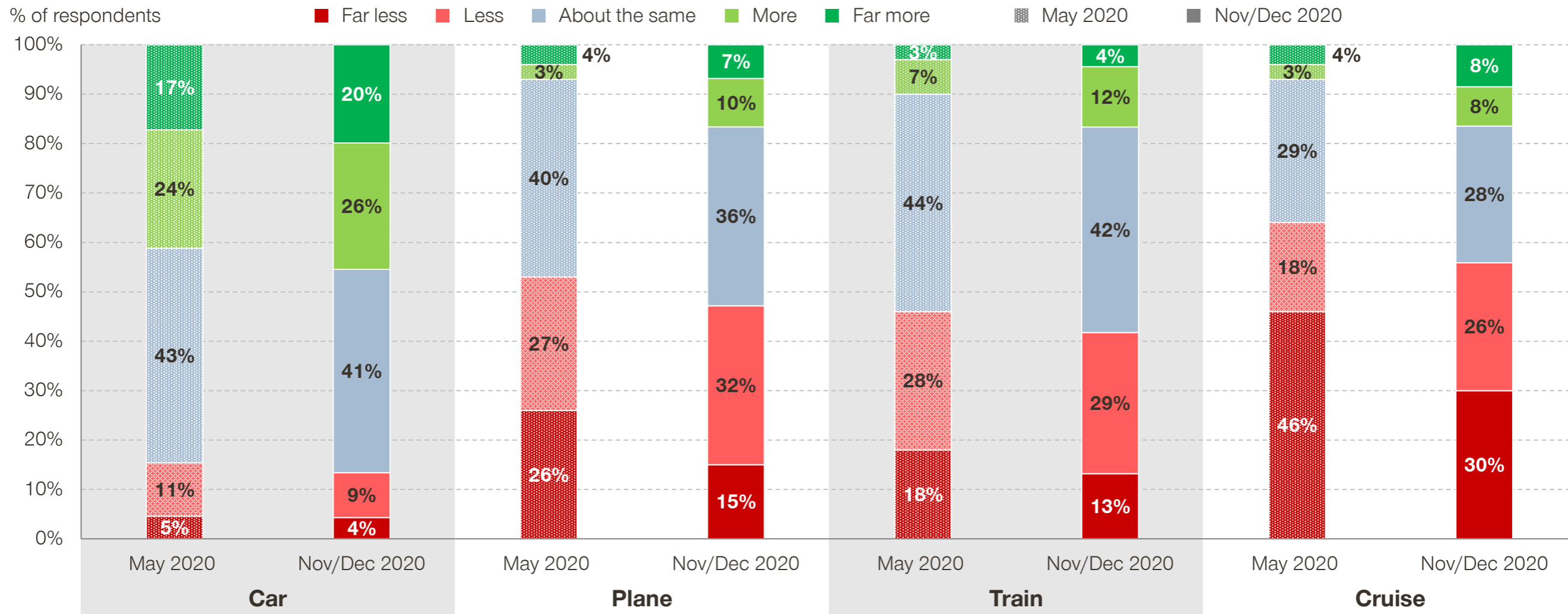
Expected impact on modes of transportation after the pandemic (May 2020¹ and Nov/Dec 2020²)



1) Q4: How do you think your travel habits for leisure purposes will change compared to how you travelled before the pandemic? 2) Q6. How do you expect Covid-19 to impact travel in 2021 compared to how you travelled before the pandemic?
Source: Simon-Kucher & Partners global market research survey conducted May 2020 and Nov/Dec 2020, Cross-national respondents, n(May)=2,305, n(Nov/Dec)=3,907

Travel preferences will change and shift towards private cars – increase in popularity of cruises and planes compared to May 2020

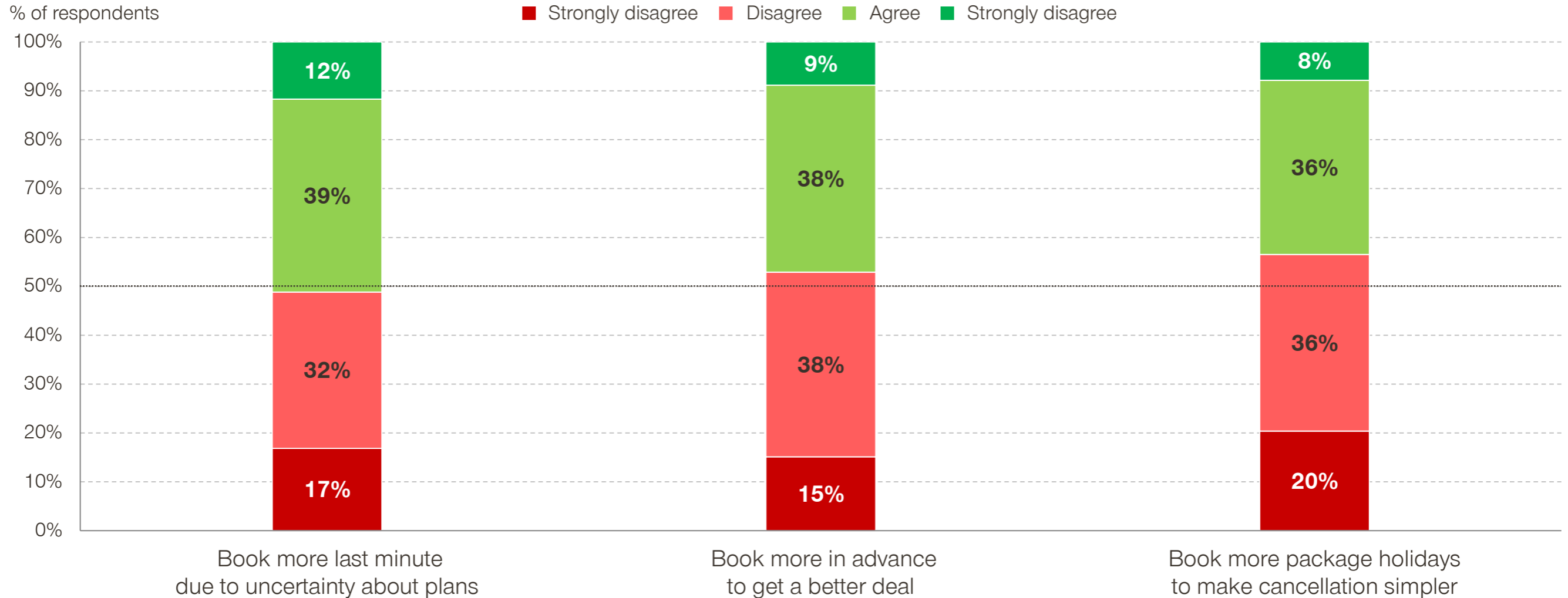
Expected impact on modes of transport to go on a holiday (May 2020¹ and Nov/Dec 2020²)



1) Q4: How do you think your travel habits for leisure purposes will change compared to how you travelled before the pandemic? 2) Q6. How do you expect Covid-19 to impact travel in 2021 compared to how you travelled before the pandemic?
Source: Simon-Kucher & Partners global market research survey conducted May 2020 and Nov/Dec 2020, Cross-national respondents, n(May)=2,305, n(Nov/Dec)=3,907

Cross-national respondents react ambivalently to pandemic – early birds want good deal while insecure travelers wait until the last minute

Impact of pandemic on booking habits¹

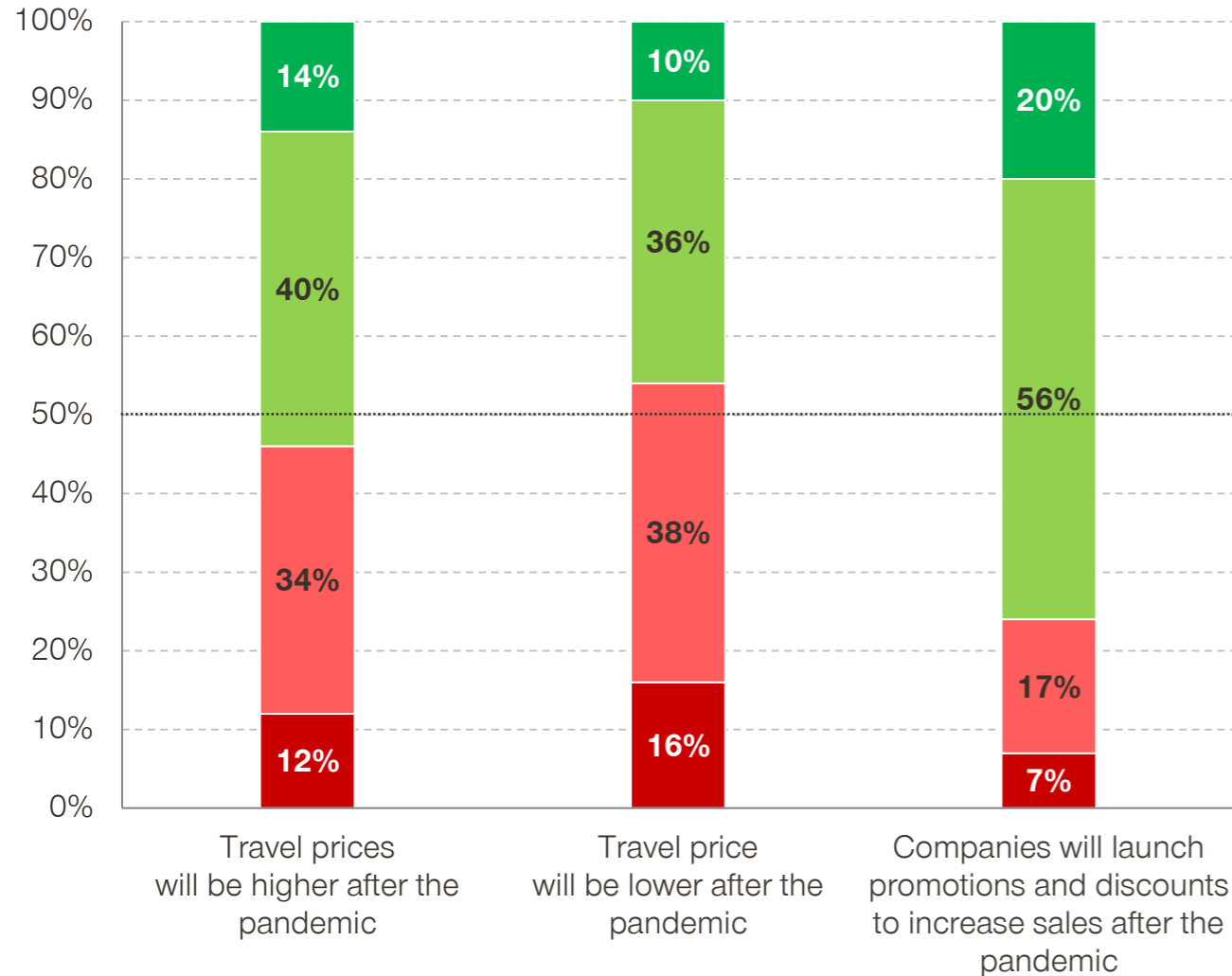


1) Q9. Opinion on travel for leisure purposes
Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907

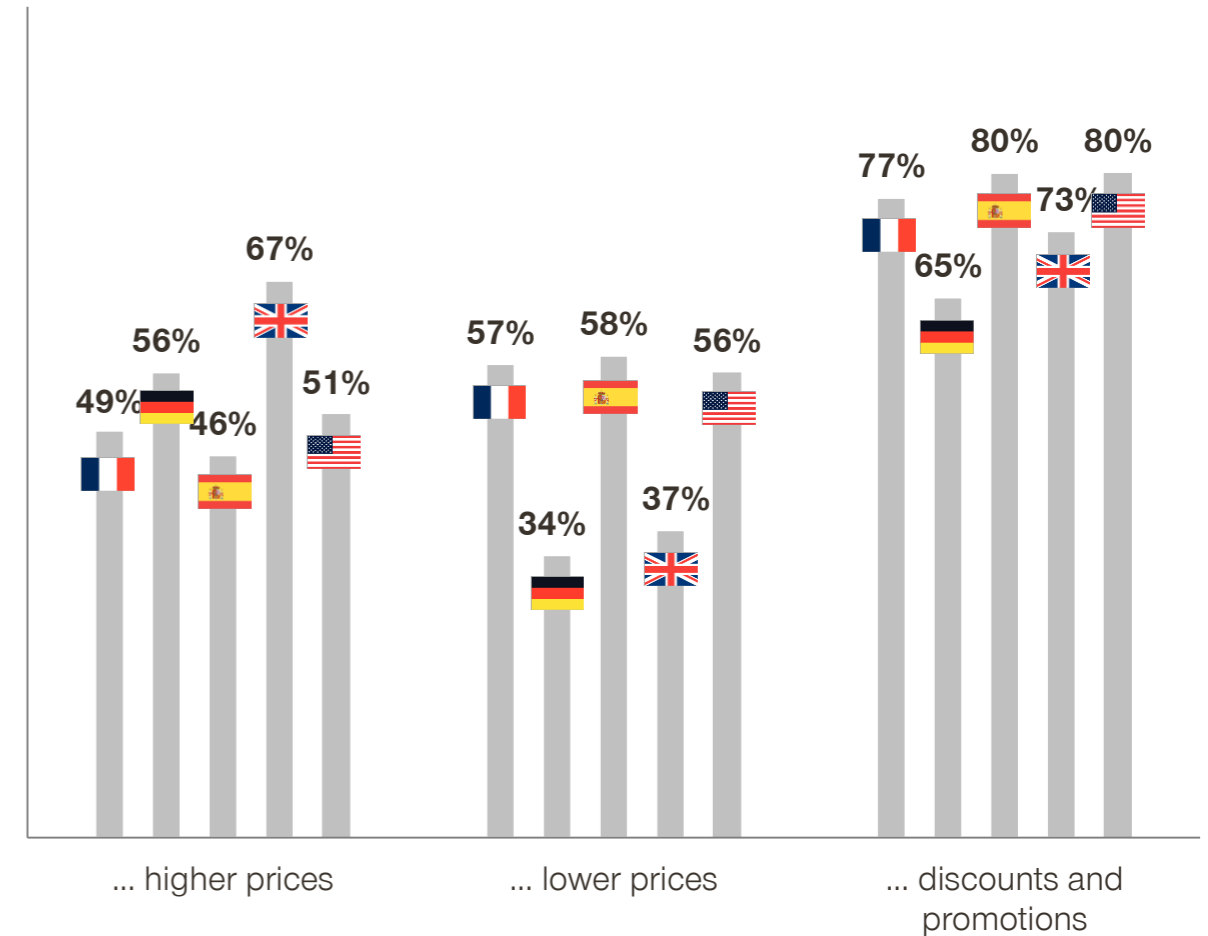
Overall, 76% of respondents expect discounts and promotions after the pandemic – expectations vary largely by country

Impact of pandemic on price expectations¹

% of respondents ■ Strongly disagree ■ Disagree ■ Agree ■ Strongly disagree



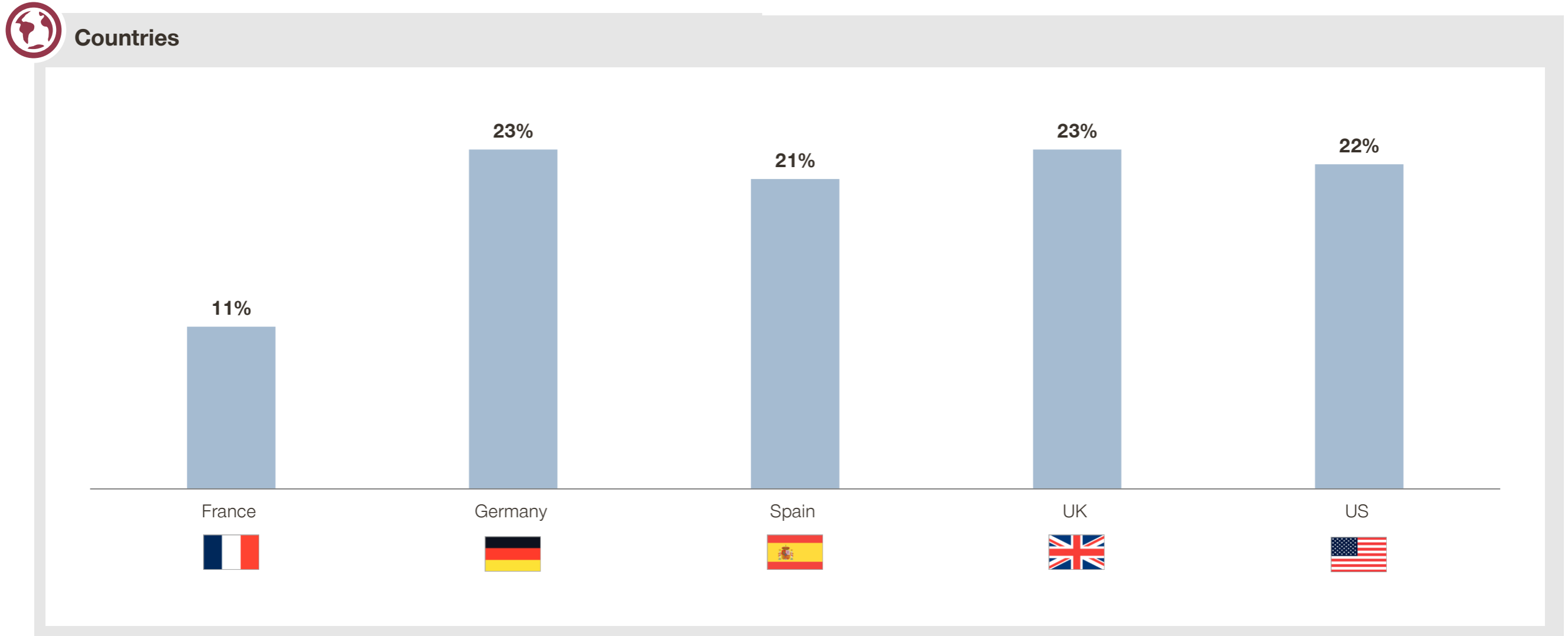
Percentage that expects ...



1) Q9. Opinion on travel for leisure purposes

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907, n(Germany)=888, n(France)=417, n(Spain)=808, n(UK)=922, n(US)=872

Demographics of cross national respondents (1/2)

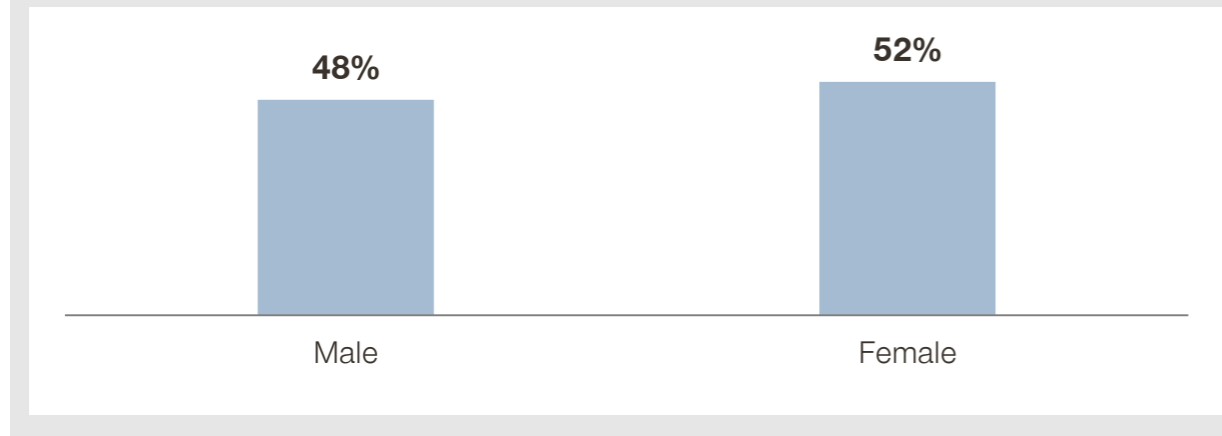


Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907

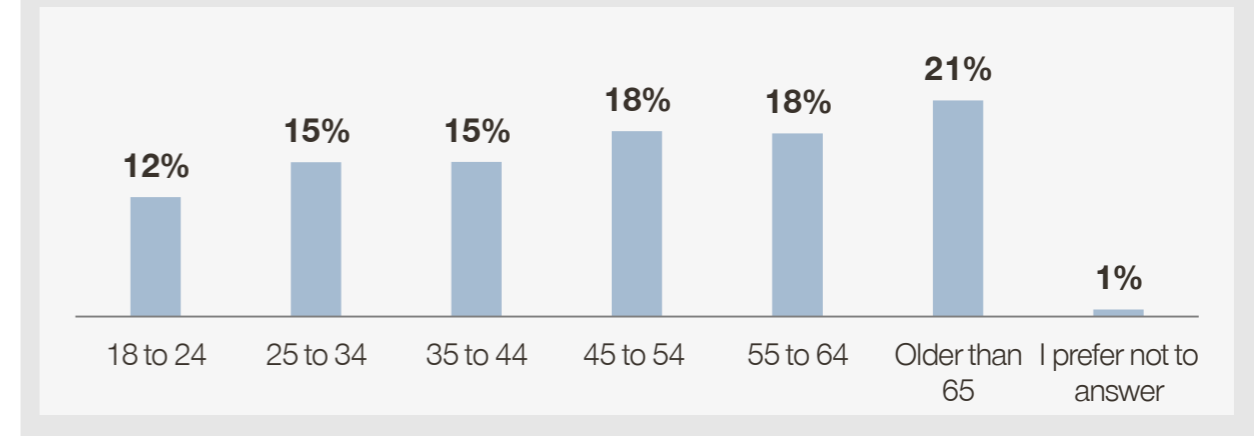
Demographics of cross national respondents (2/2)



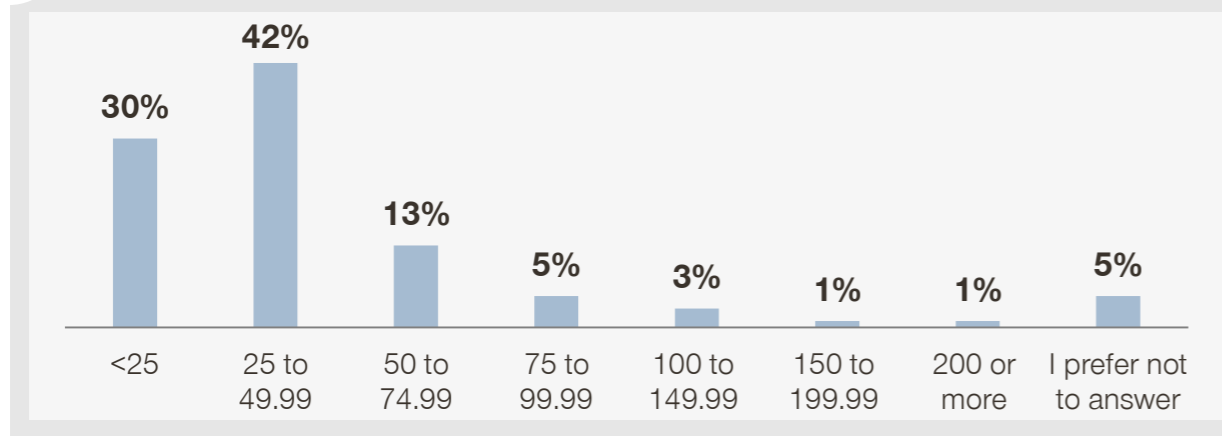
Gender



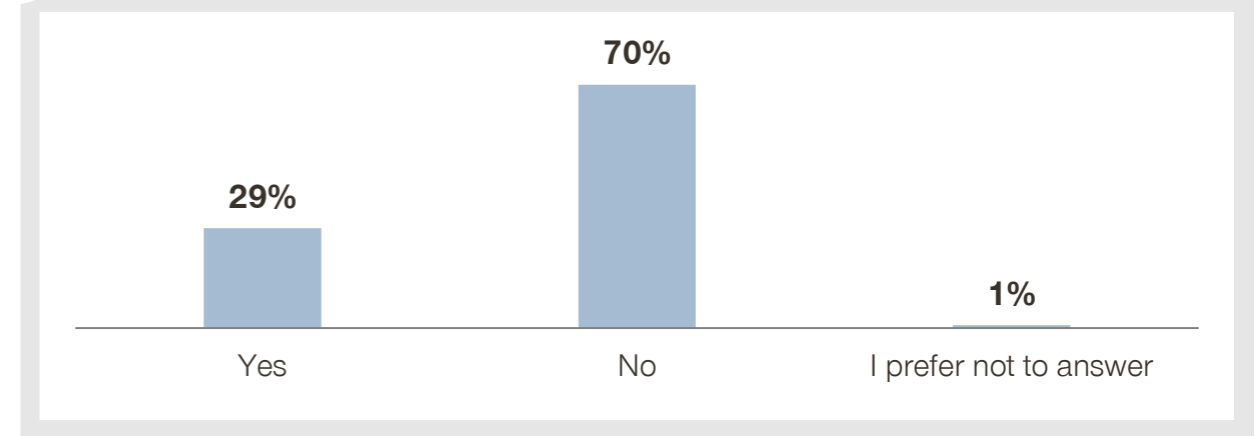
Age (in years)



Household income after tax (in k EUR,USD or GBP)



Children under 18 living in household



Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, Cross-national respondents n=3,907

Observations from 2021 confirm shifts in demand and consumer preferences with respect to travel



Demand drop: 30% of French respondents do not expect to go on vacation any time soon



Increased domestic tourism (i.e. staycations): In France, 35% expect to go on domestic holidays more often than before the pandemic



Modal shift from planes to cars: 37% expect to travel more often by car for their holiday instead of going by airplane (39% expect to take less planes) or train (29% expect to take less trains)



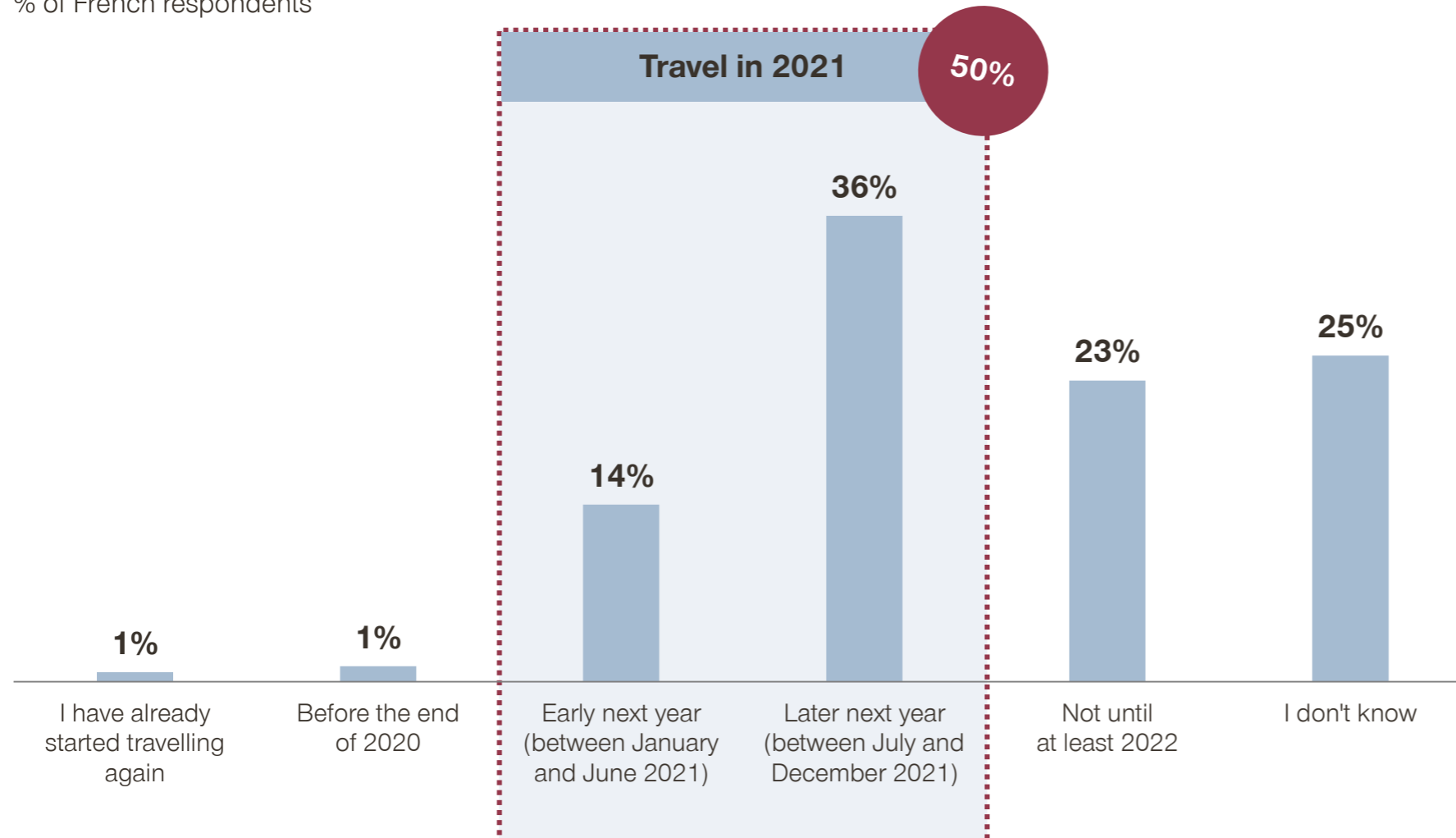
Cruises demand hit the hardest: 50% expect to go on less cruises



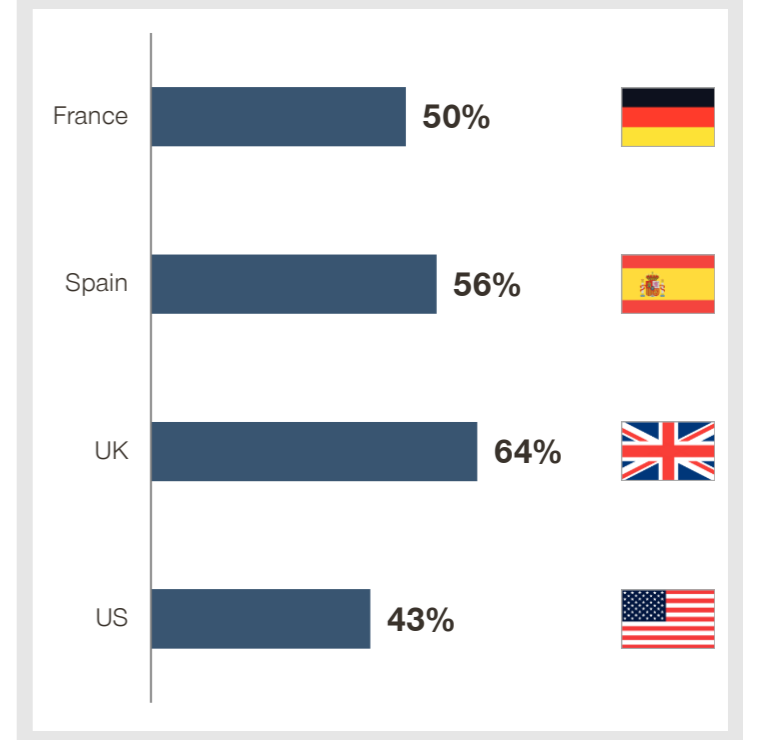
50% of French respondents expect to travel again for leisure in 2021 - British and Spanish respondents are more optimistic

When do you think you will start travelling (multi-day, international trip) for leisure purposes again?

% of French respondents



Percentage that expect to travel again in 2021

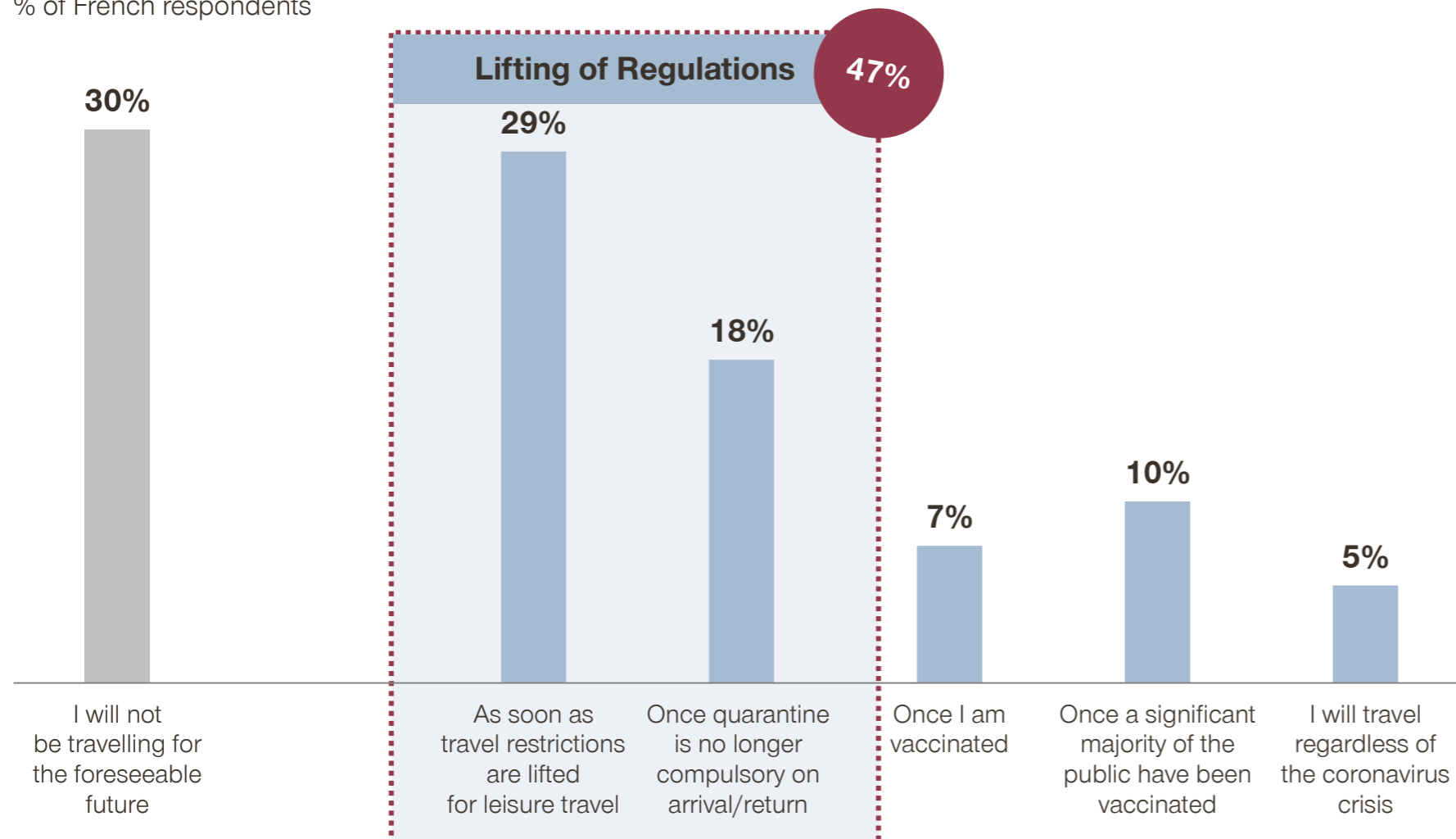


Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, n(Germany)=888, n(France)=417, n(Spain)=808, n(UK)=922, n(US)=872

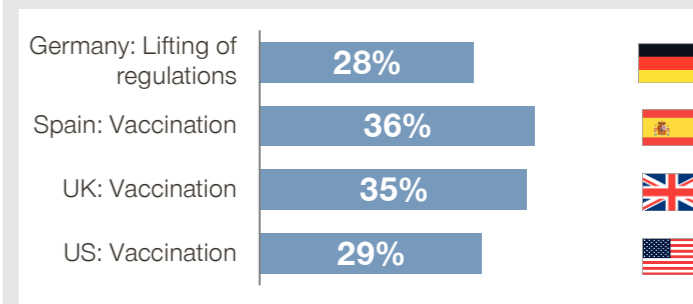
30% of French respondents do not expect to go on vacation any time soon, lifting of regulations number one trigger for travelling again

What would prompt you to travel abroad for leisure purposes (multi-day, international trip) again?¹

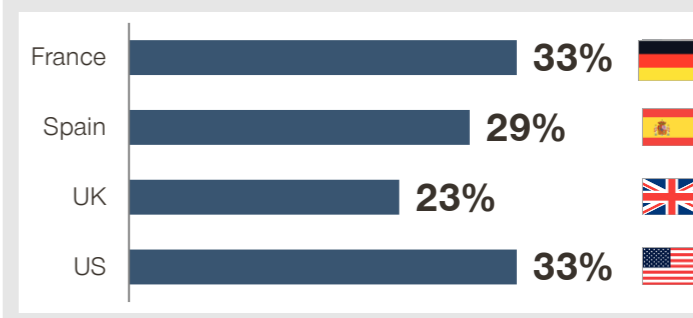
% of French respondents



#1 triggers to travel internationally



Percentage that will not be travelling for foreseeable future

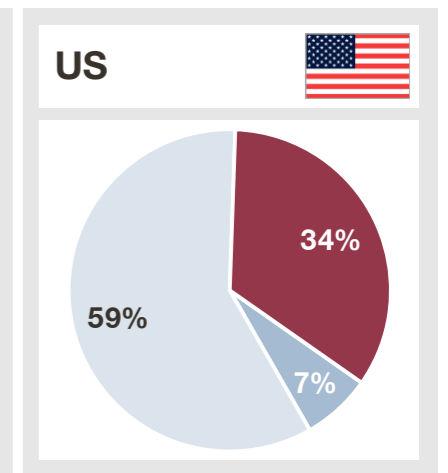
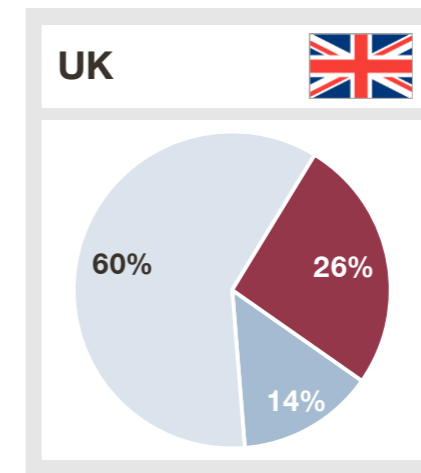
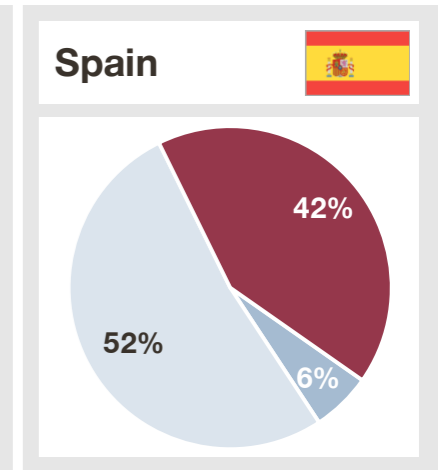
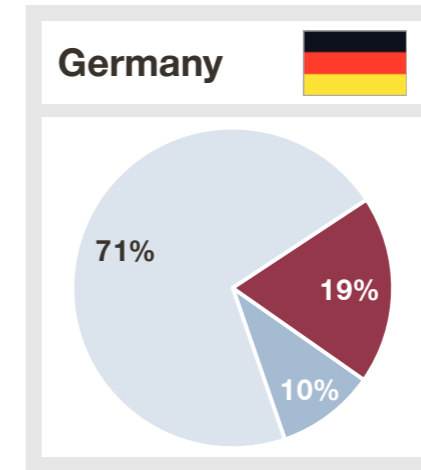
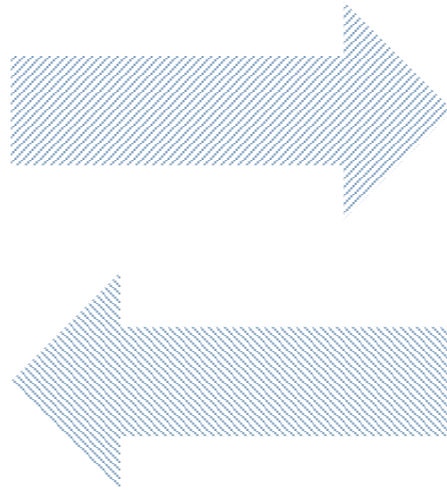
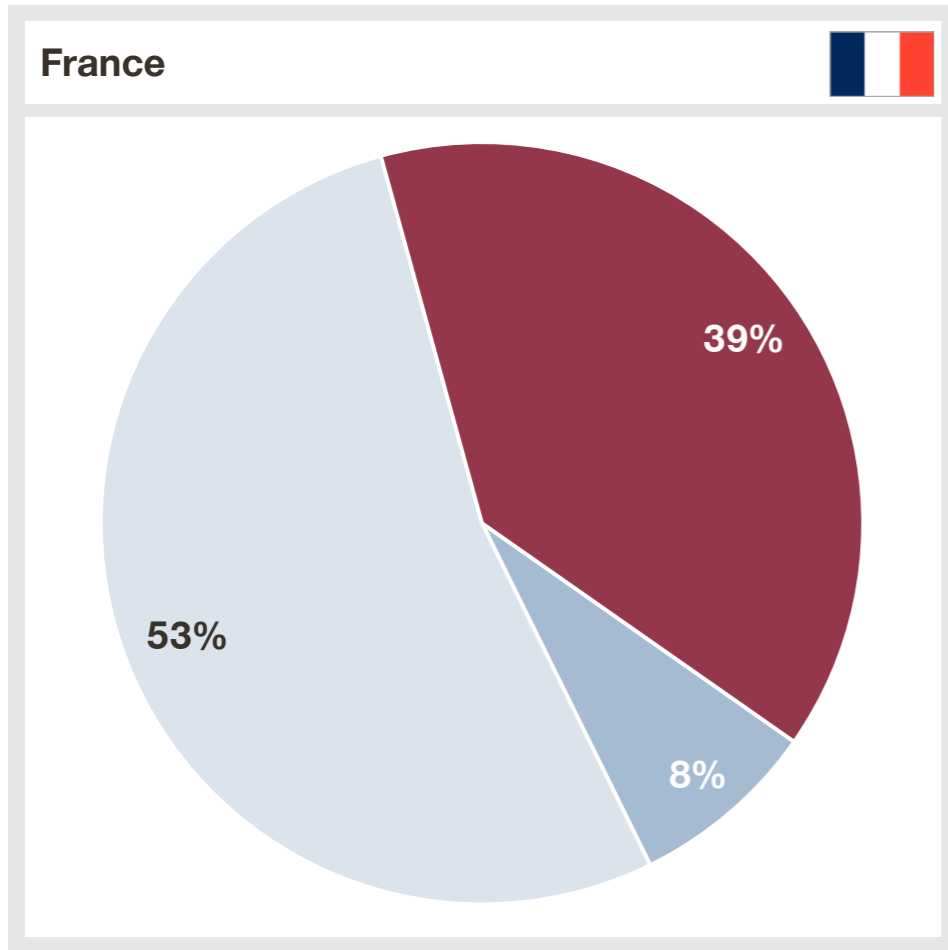


1) The remaining respondents have chosen the option "other"

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, n(Germany)=888, n(France)=417, n(Spain)=808, n(UK)=922, n(US)=872

Within survey, second highest overall travel budget decline after the pandemic expected for France at 39%

Expected impact of pandemic on travel budget¹



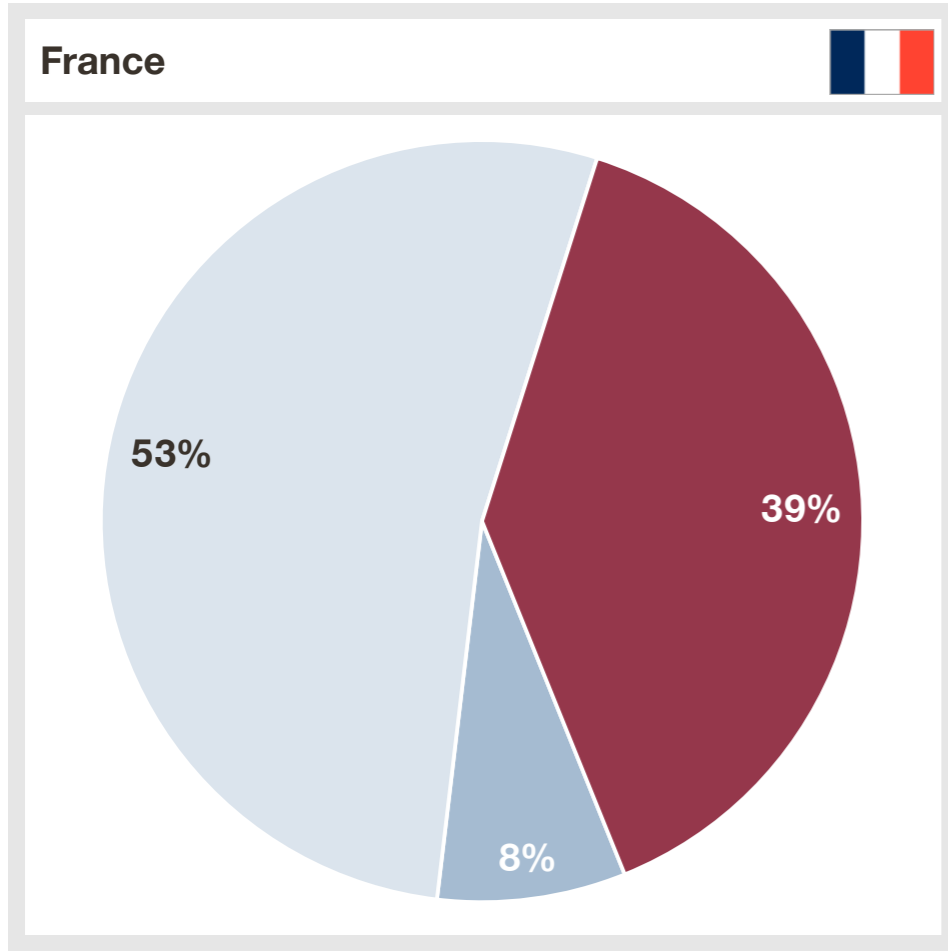
■ Increase of budget ■ Budget will stay the same ■ Reduction of budget

1) Q4a. Thinking about your next big trip, has the pandemic affected your budget for travel?

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, German respondents, n=888, n(France)=417, n(Spain)=808, n(UK)=922, n(US)=872

39% of French respondents will decrease travel budget, main reasons being uncertainty about professional status and cancellation apprehension

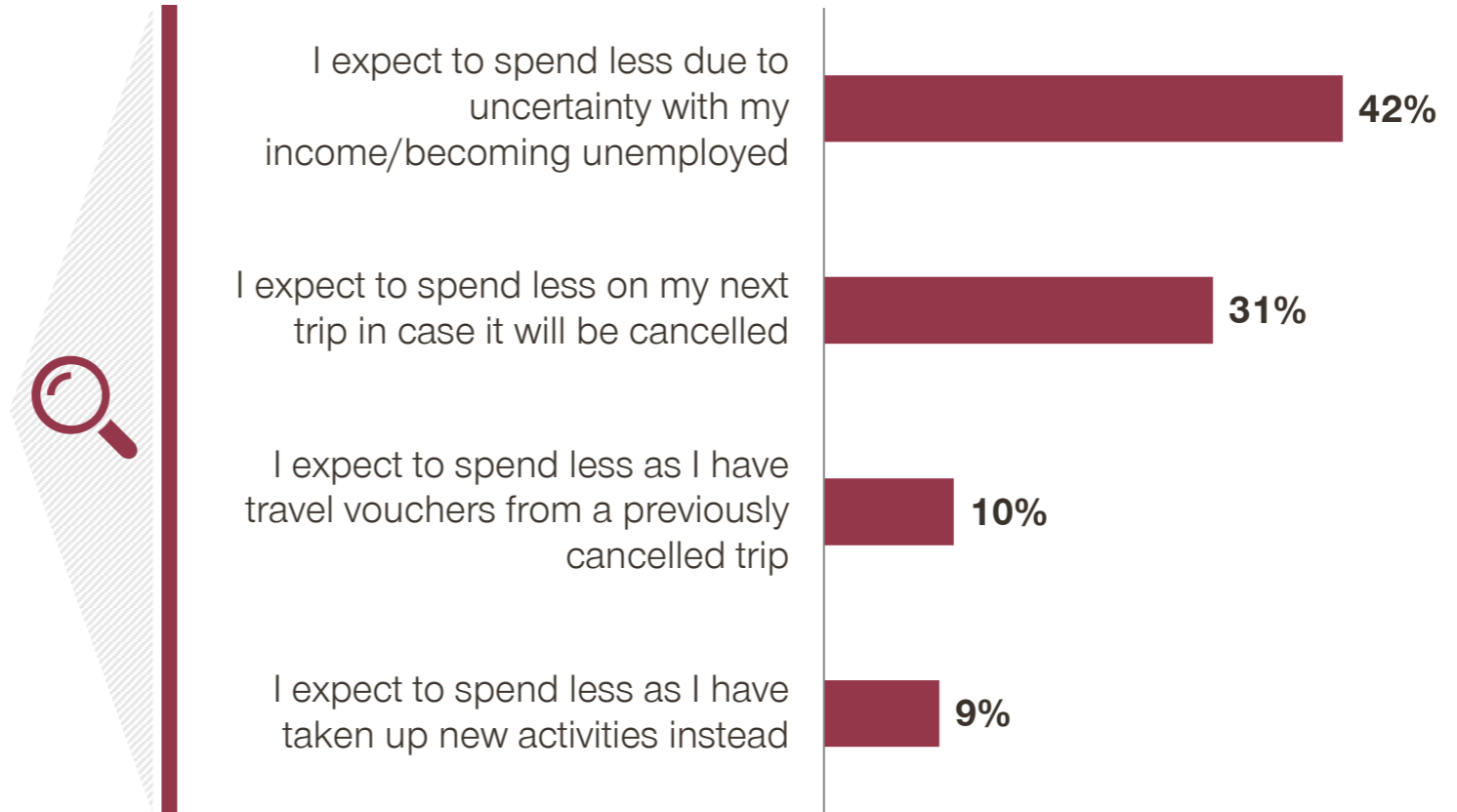
Expected impact of pandemic on travel budget of French respondents¹



■ Increase of budget ■ Budget will stay the same ■ Reduction of budget

Reasons for decreased travel budget²

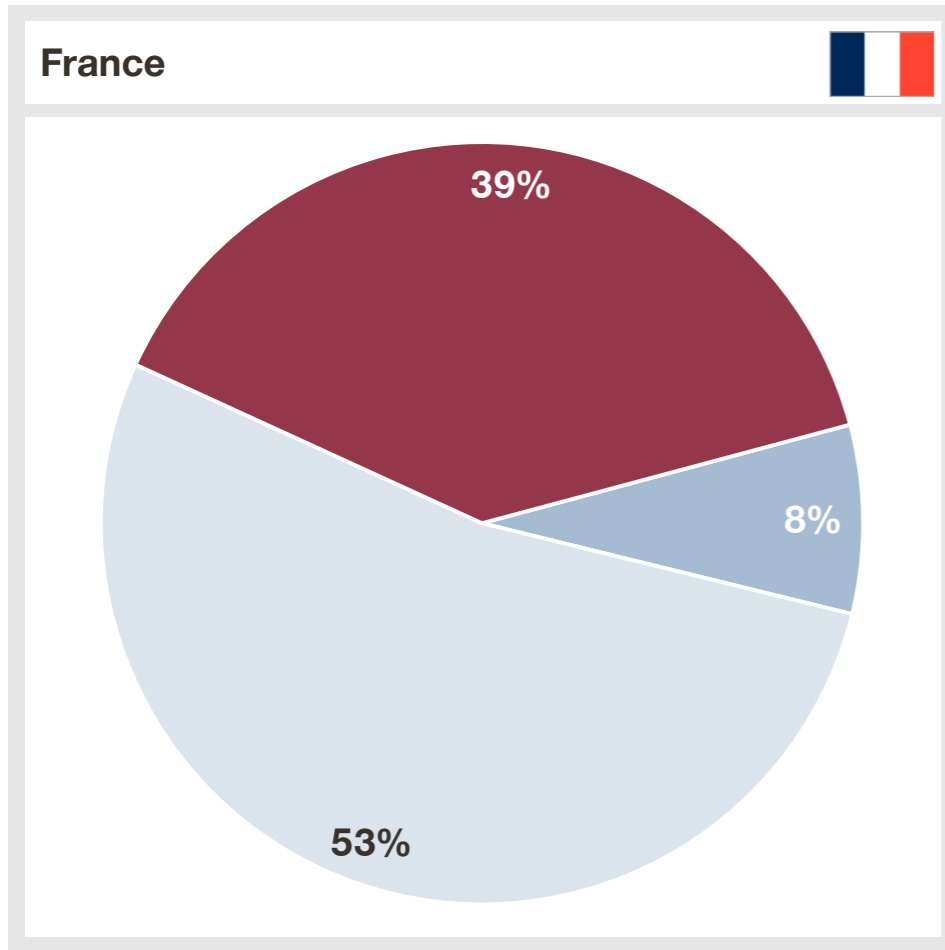
% of French respondents (multiple choices possible)



1) Q4a: Thinking about your next big trip, has the pandemic affected your budget for travel?; 2) Q4c: Why has your budget for travel decreased for your next big trip? (n=173)
Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, French respondents, n=417

8% of French respondents plan to increase travel budget, no clear preference for trip length or frequency

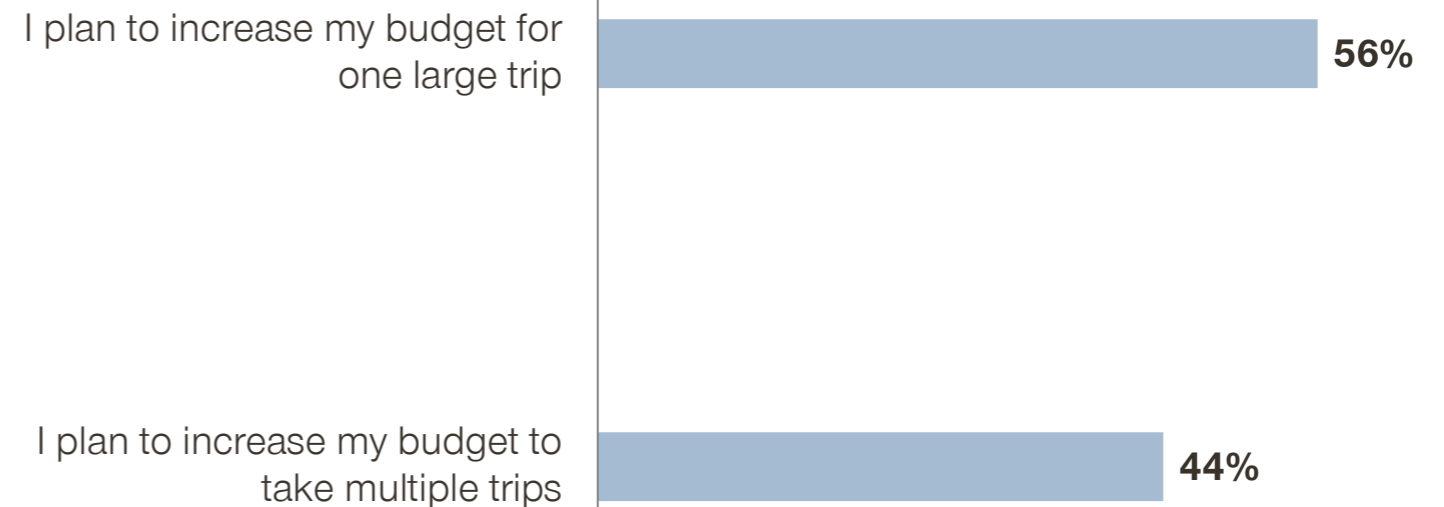
Expected impact of pandemic on travel budget of French respondents¹



■ Increase of budget ■ Budget will stay the same ■ Reduction of budget

Do you plan to spend more on a single trip or across multiple trips?²

% of German respondents

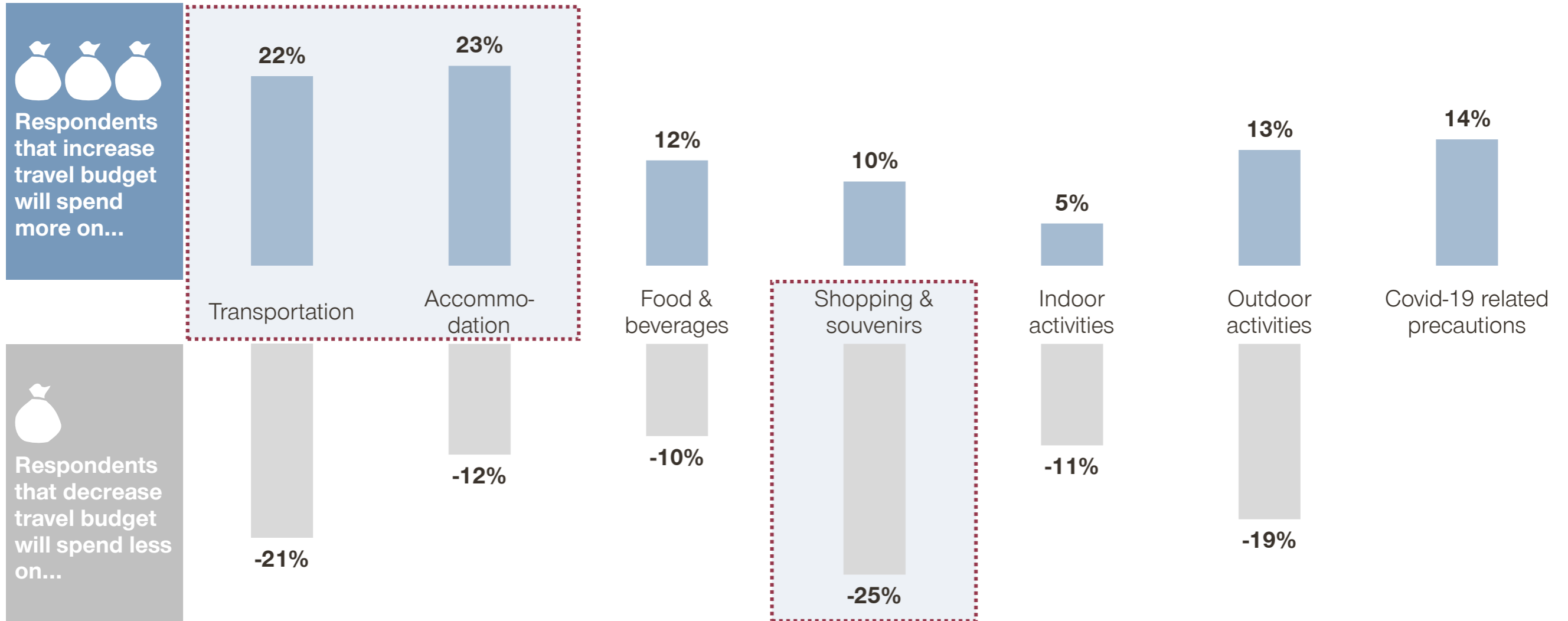


1) Q4a. Thinking about your next big trip, has the pandemic affected your budget for travel?

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, French respondents, n=417

Increased budget mainly for accommodation and transportation while strongest decrease in budget for shopping and souvenirs

% of French respondents (multiple choices possible)

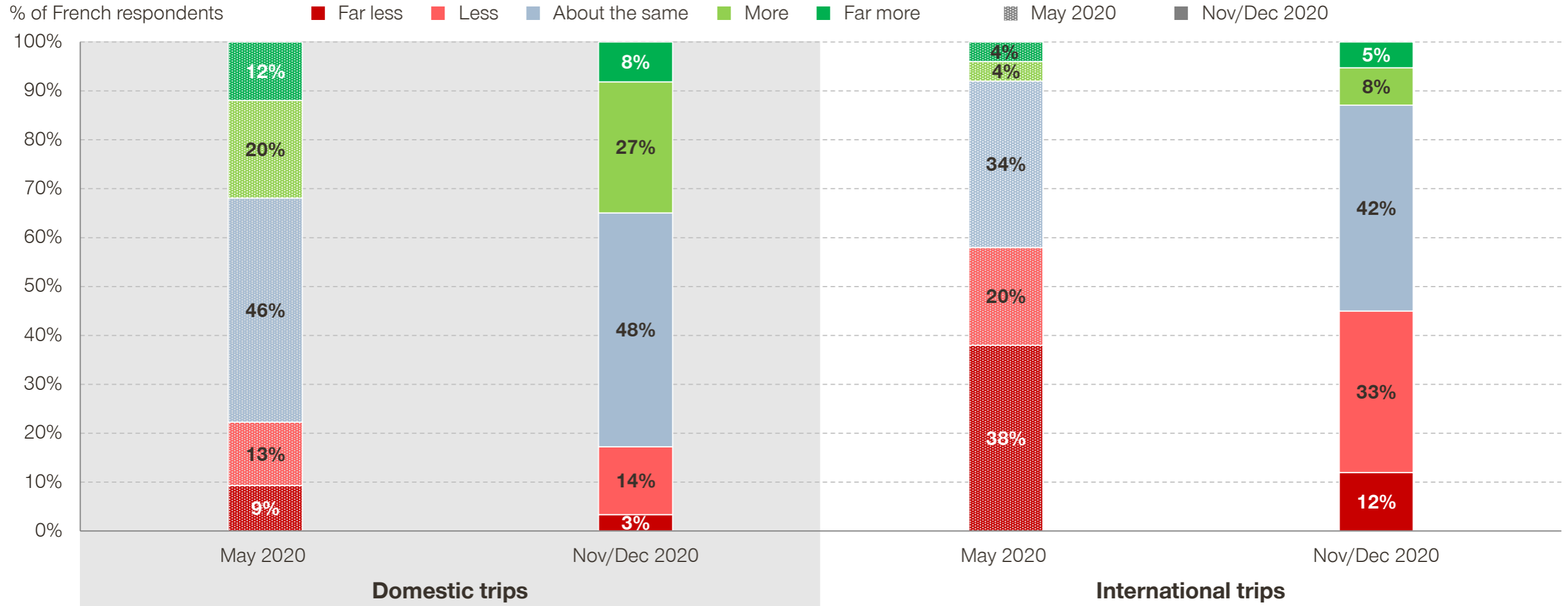


1) Q4d: What do you think you will spend more money on for your next trip? (n=83) 2) Q4e: What do you think you will spend less money on for your next trip? (n=335)

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, French respondents, n=417 – the remaining respondents will not change their travel budget after the pandemic

Notable higher preference for international trips vs. May 2020 and domestic trips still growing

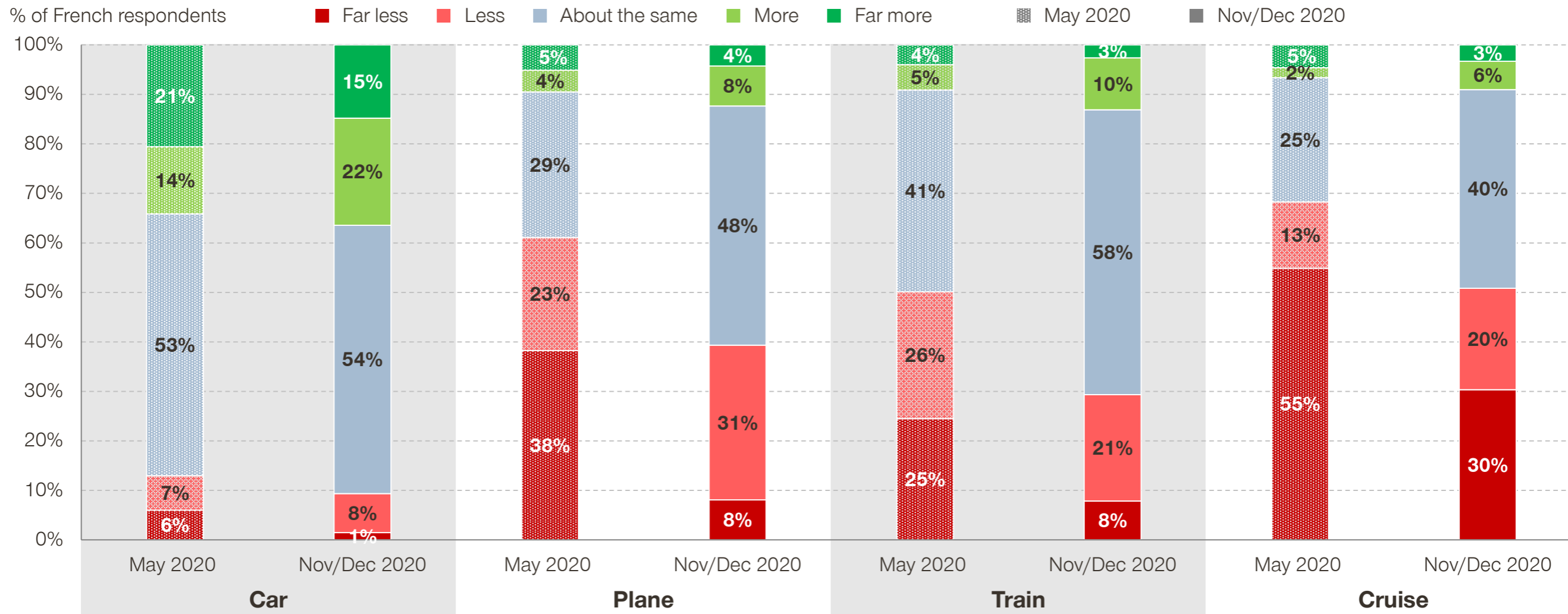
Expected impact on modes of transportation after the pandemic (May 2020¹ and Nov/Dec 2020²)



1) Q4: How do you think your travel habits for leisure purposes will change compared to how you travelled before the pandemic? 2) Q6. How do you expect Covid-19 to impact travel in 2021 compared to how you travelled before the pandemic?
Source: Simon-Kucher & Partners global market research survey conducted May 2020 and Nov/Dec 2020, French respondents, n(May)=548, n(Nov/Dec)=417

Travel preferences will change and shift towards private cars. However, French market show positive results regarding other transports compared to May 2020

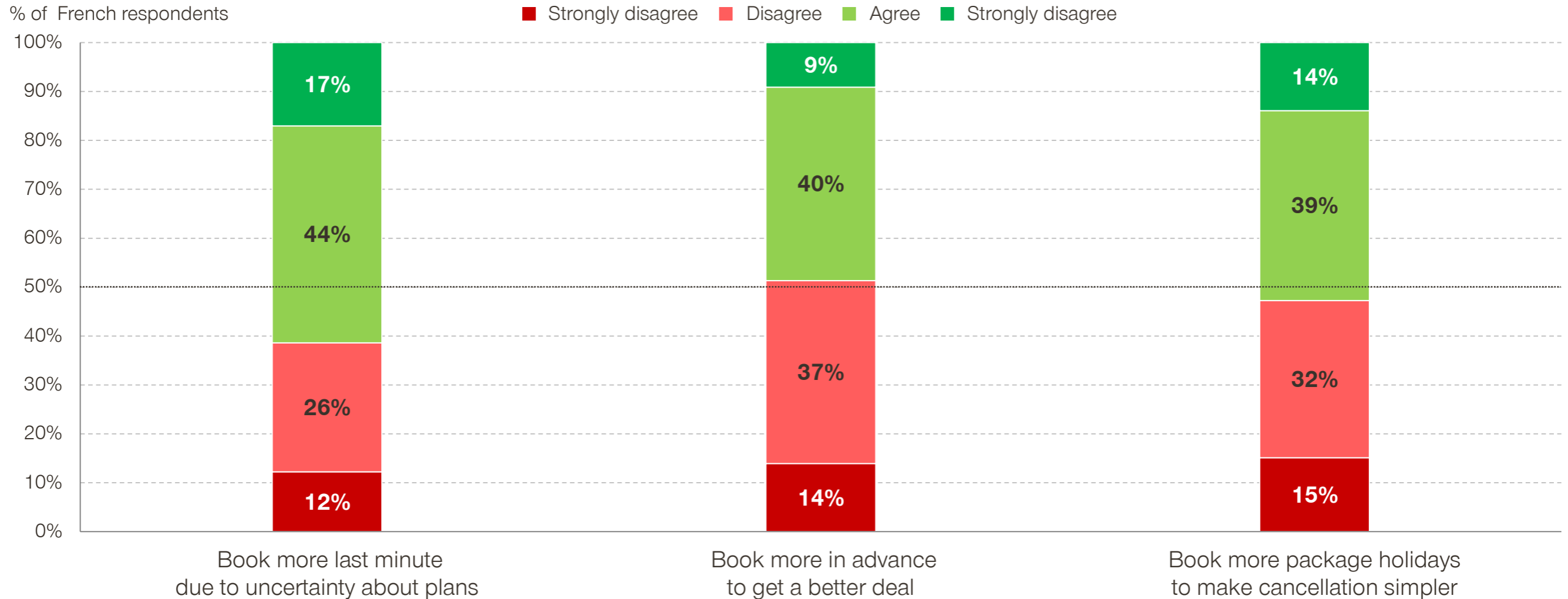
Expected impact on modes of transport to go on a holiday (May 2020¹ and Nov/Dec 2020²)



1) Q4: How do you think your travel habits for leisure purposes will change compared to how you travelled before the pandemic? 2) Q6. How do you expect Covid-19 to impact travel in 2021 compared to how you travelled before the pandemic?
Source: Simon-Kucher & Partners global market research survey conducted May 2020 and Nov/Dec 2020, French respondents, n(May)=548, n(Nov/Dec)=417

French travelers being more unsecured will wait until last minute. Still early birds represent half of the market looking for better deals

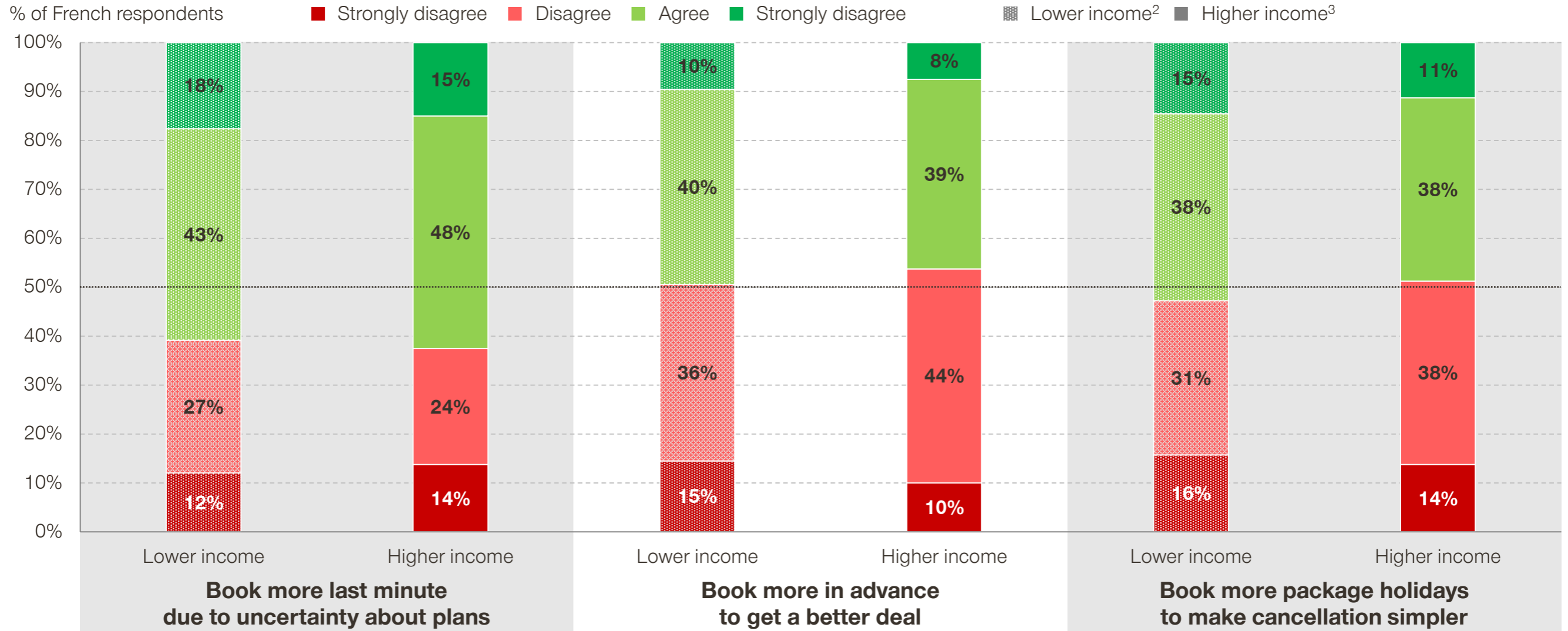
Impact of pandemic on booking habits¹



1) Q9. Opinion on travel for leisure purposes
Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, German respondents, n=888

No clear differentiation regarding booking habits of French respondents with different levels of household income

Impact of pandemic on booking habits¹

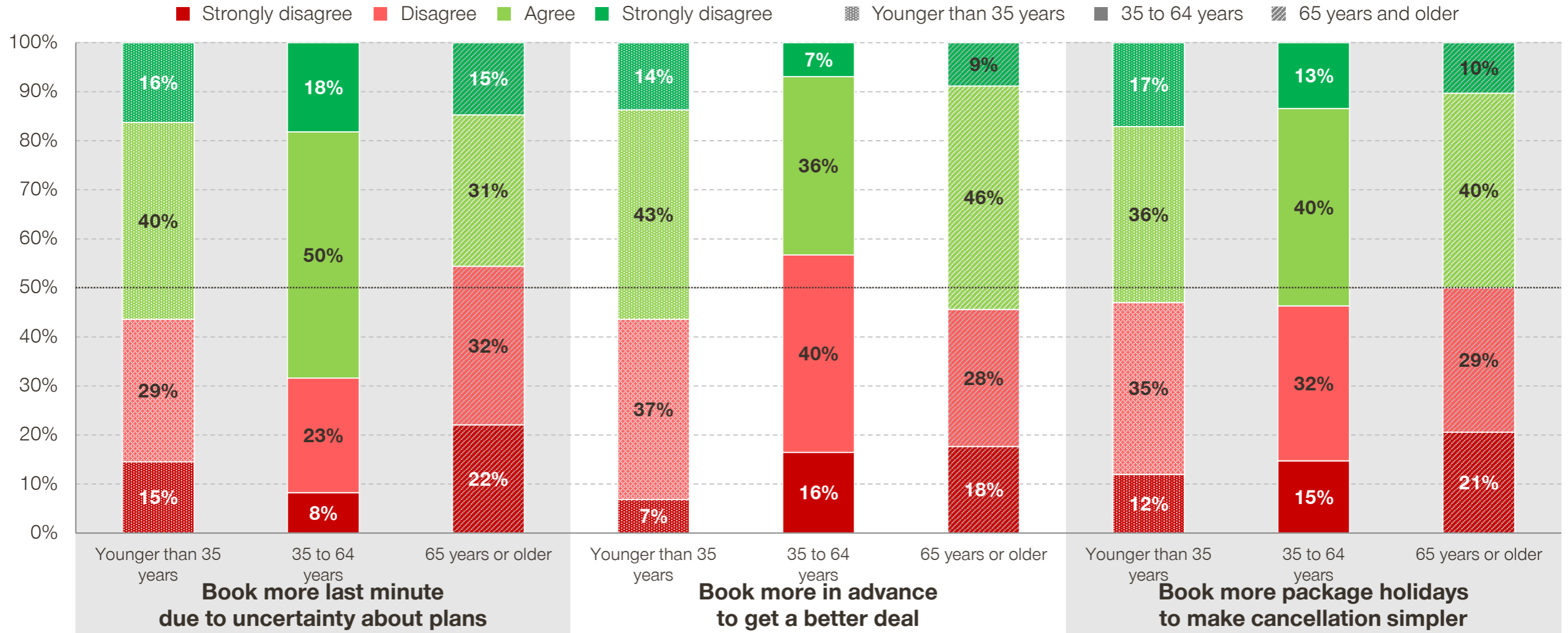


1) Q9. Opinion on travel for leisure purposes 2) Household income less than 50,000€ 3) Household income of 50,000€ or more

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, German respondents, n=417, n(<50,000€)=324, n(>50,000€)=80 – the remaining respondents did not want to state their household income

Younger and older French are more price sensitive and will look for good deals while the 35-64 age group will adopt more a last minute behavior

Impact of pandemic on booking habits¹



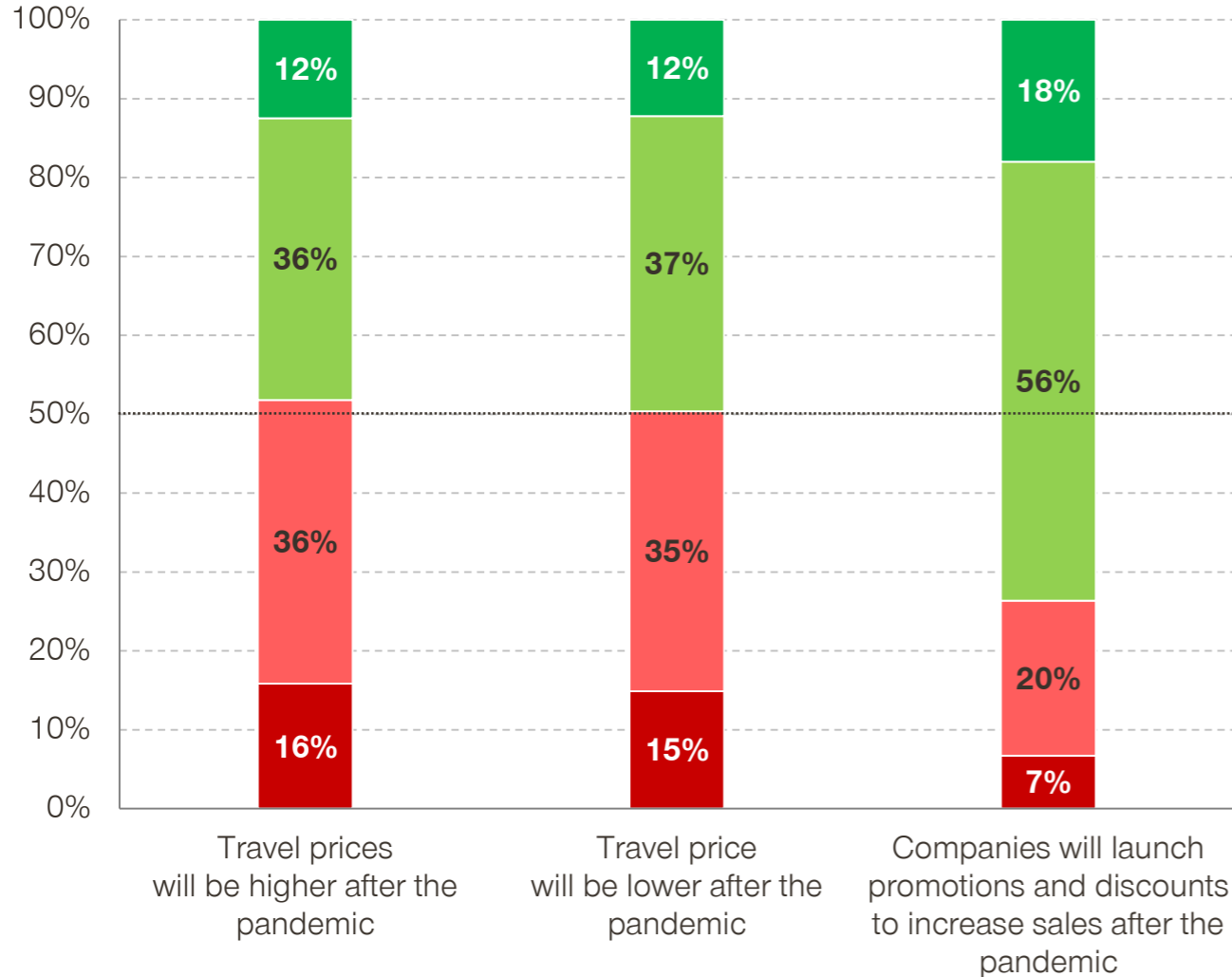
1) Q9. Opinion on travel for leisure purposes

Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, French respondents, n=417, n(<35 years)=117, n(35 to 64 years)=230, n(>65 years)=68 – the remaining respondents did not want to state their age

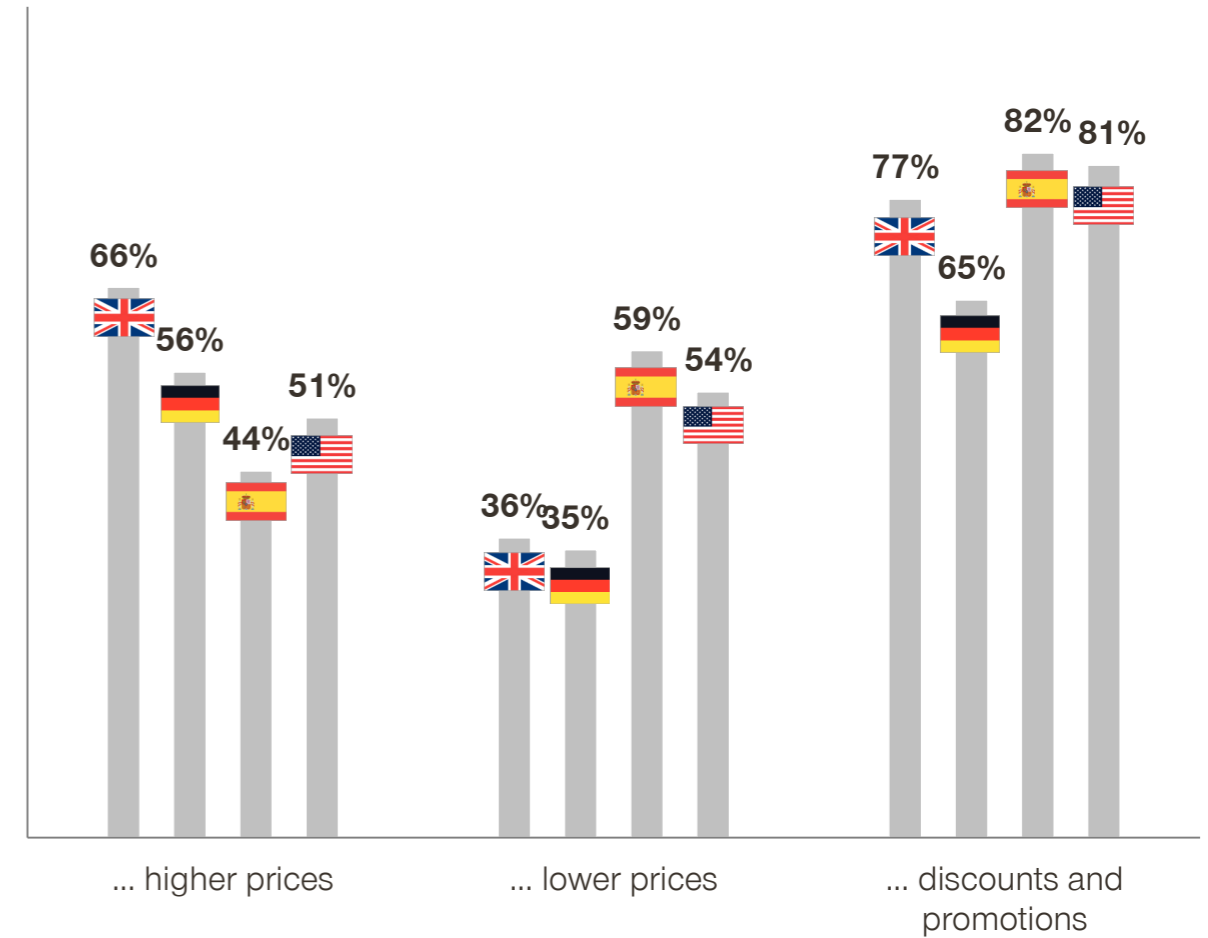
74% of French respondents expect discounts and promotions after the pandemic, a bit more moderate compared to other countries

Impact of pandemic on price expectations¹

% of French respondents ■ Strongly disagree ■ Disagree ■ Agree ■ Strongly agree



Percentage that expects ...



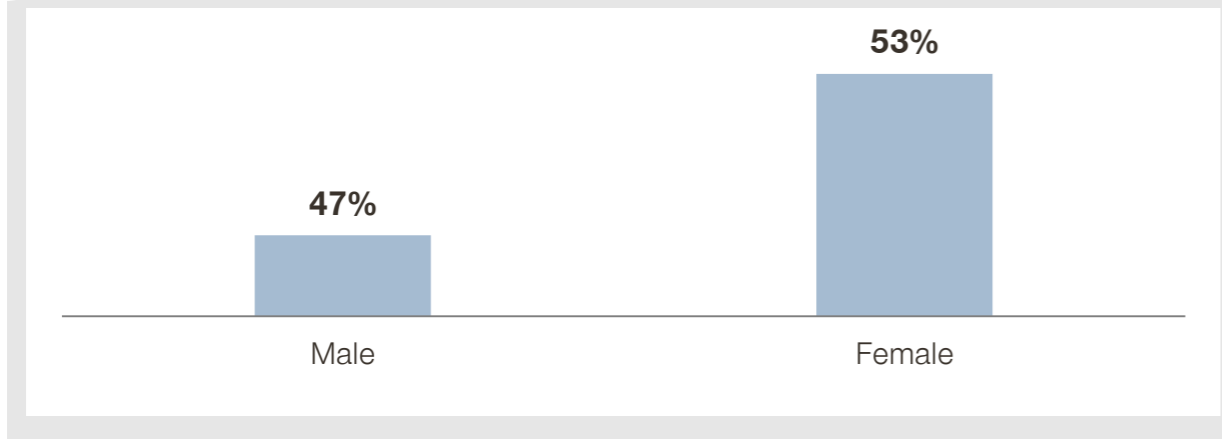
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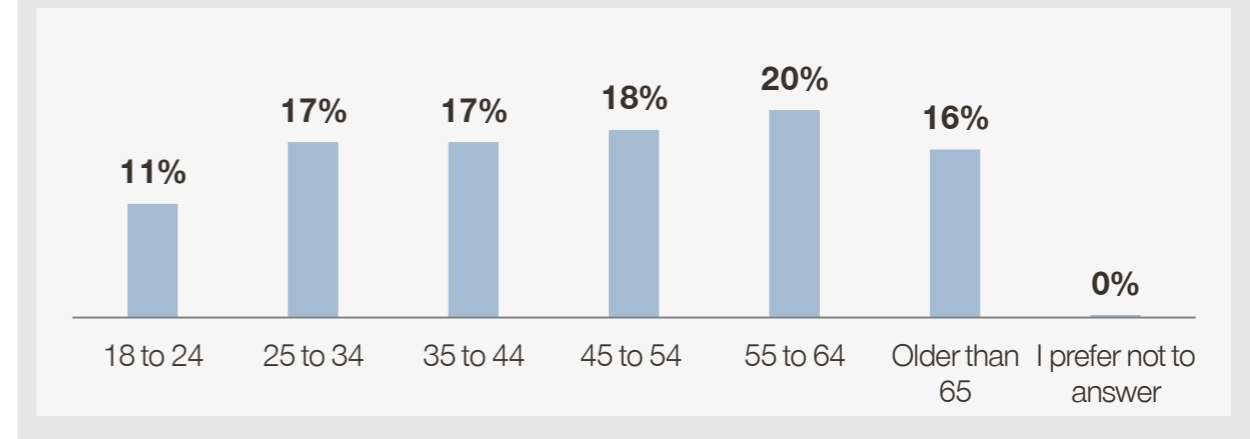
Demographics of French respondents



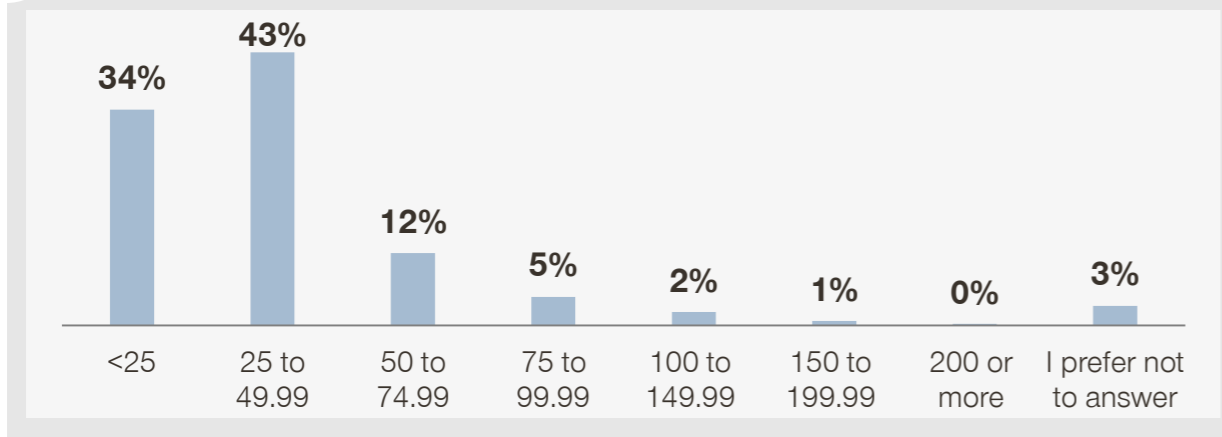
Gender



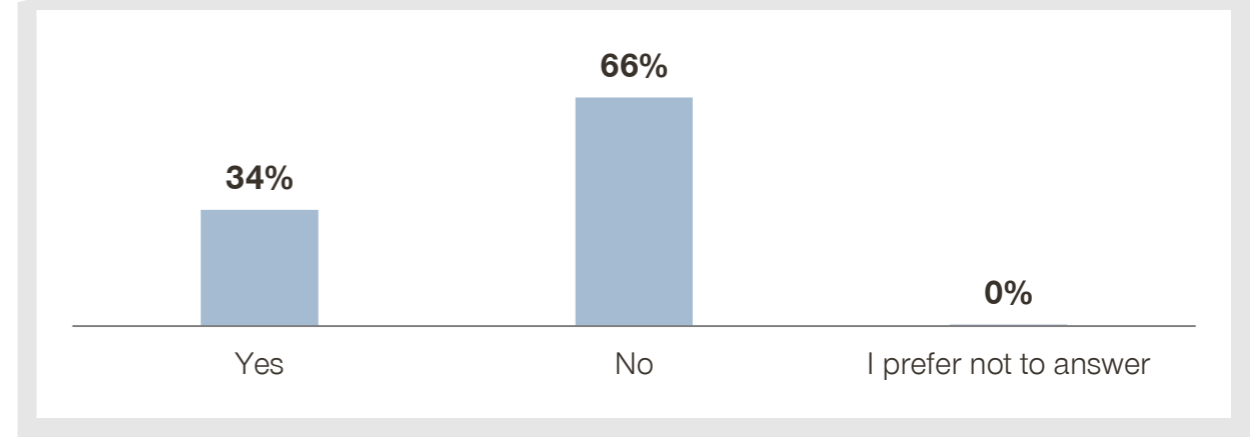
Age (in years)



Household income after tax (in k€)



Children under 18 living in household



Source: Simon-Kucher & Partners global market research survey conducted Nov/Dec 2020, French respondents, n=417