



Stena Line COVID-19 Travel Survey

2020-08-05

About the survey

The online survey was sent via email in the end of June 2020, to over 1 million Stena Line travel customers in eleven countries in Europe that had engaged with Stena Line the past 12 months.

The countries are Denmark, Germany, France, Ireland, Latvia, Lithuania, Netherlands, Norway, Poland, Sweden and United Kingdom.

In total the survey was answered by 84,309 respondents. One lucky participant per country received €500 travel voucher. Data is available on an aggregated level as well as per country.

UK	31,413
Sweden	17,534
Germany	7,935
Netherlands	7,707
Republic of Ireland	7,078
Norway	4,816
Denmark	3,354
Poland	2,336
Latvia	854
Lithuania	599
France	281
+ Other markets	402

84,309
completed
surveys

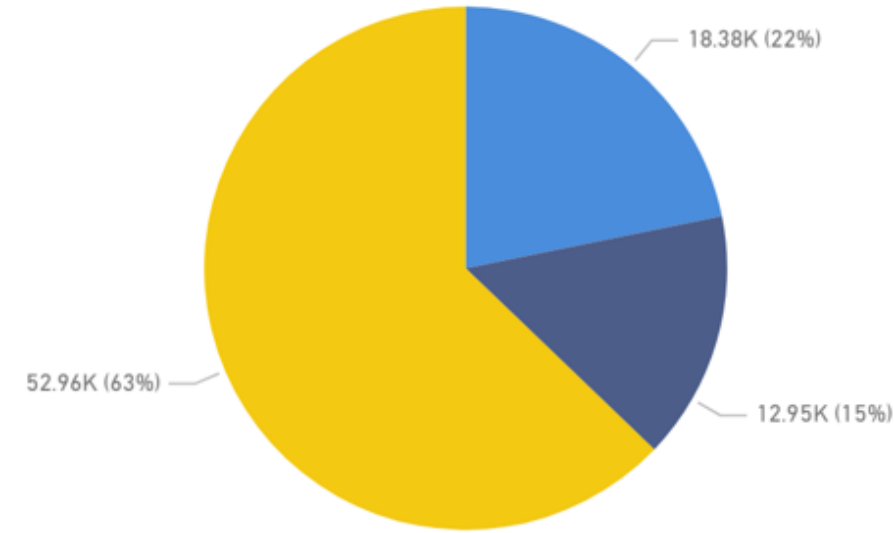
Main trends/findings

- Good news for the travel industry is that overall attitudes towards travel remain strong, with **78%** of the respondents saying they **will travel same or more than before**.
- When choosing destination, the trend is to **stay in Europe (44 %)** or **visit a neighbouring country (42 %)**. Only 1 % answers that they will avoid from travelling totally.
- Almost two thirds of the respondents (**65 %**) answered they would consider ferry travel over air travel in the wake of COVID-19. When choosing means of transport the respondents are **most likely to choose to travel by car and ferry** and less likely to travel by air, coach and with train.
- The COVID-19 pandemic has also **changed the priorities** when choosing how we travel. **83% of said fresh air circulation onboard or the ability to go out on deck** was important or very important. While **75% said the ability to move round** was important/very important. in total **72 % rates the importance of getting information** by the transport company about safety measures, social distancing and hygiene measures as important/very important.

Going forward, do you think you will change your travel behaviour in any way?

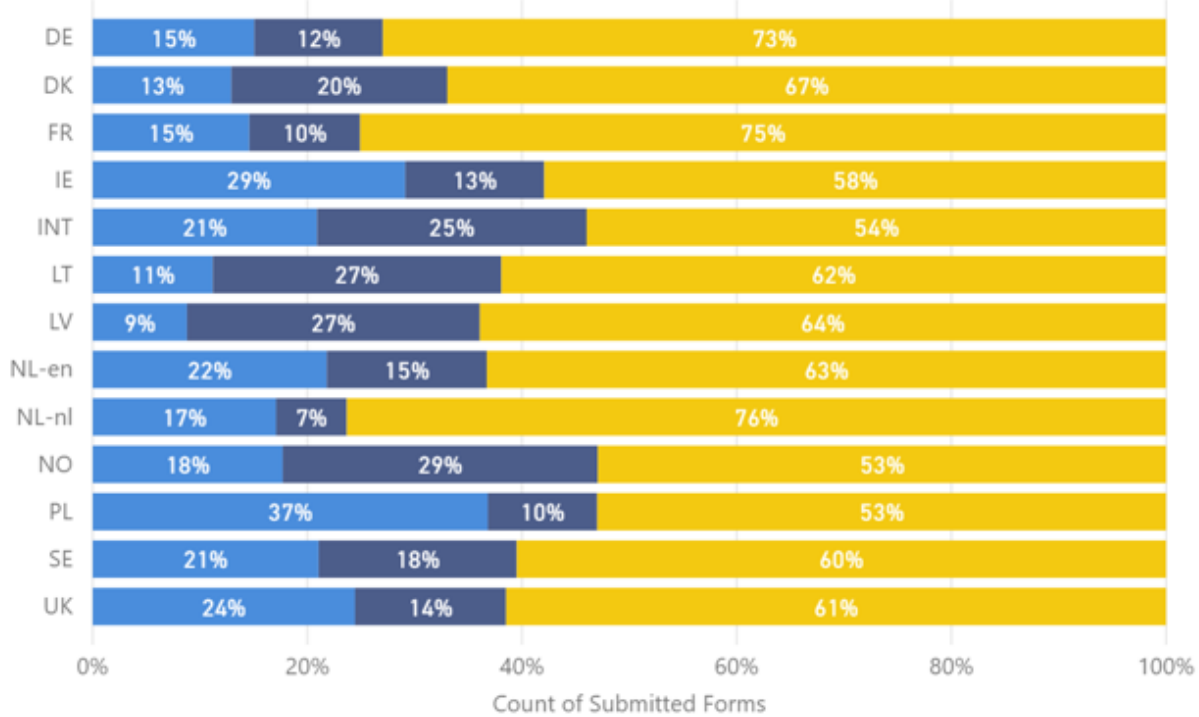
I will travel.....

● Less ● More ● No change



I will travel.....

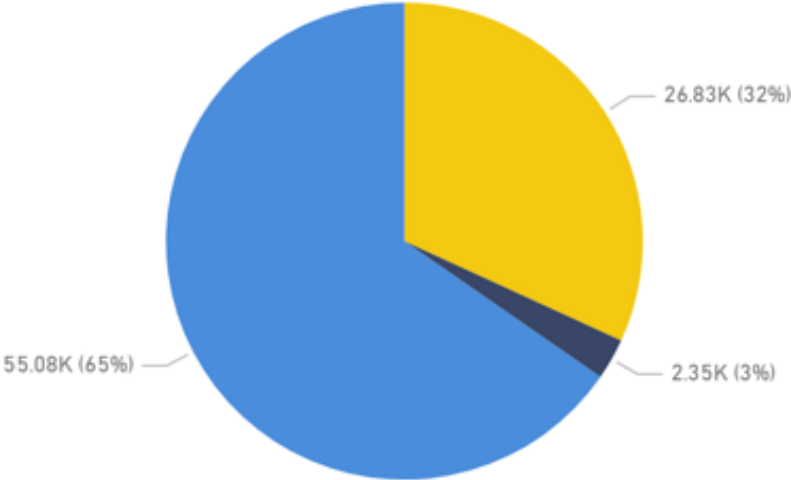
● Less ● More ● No change



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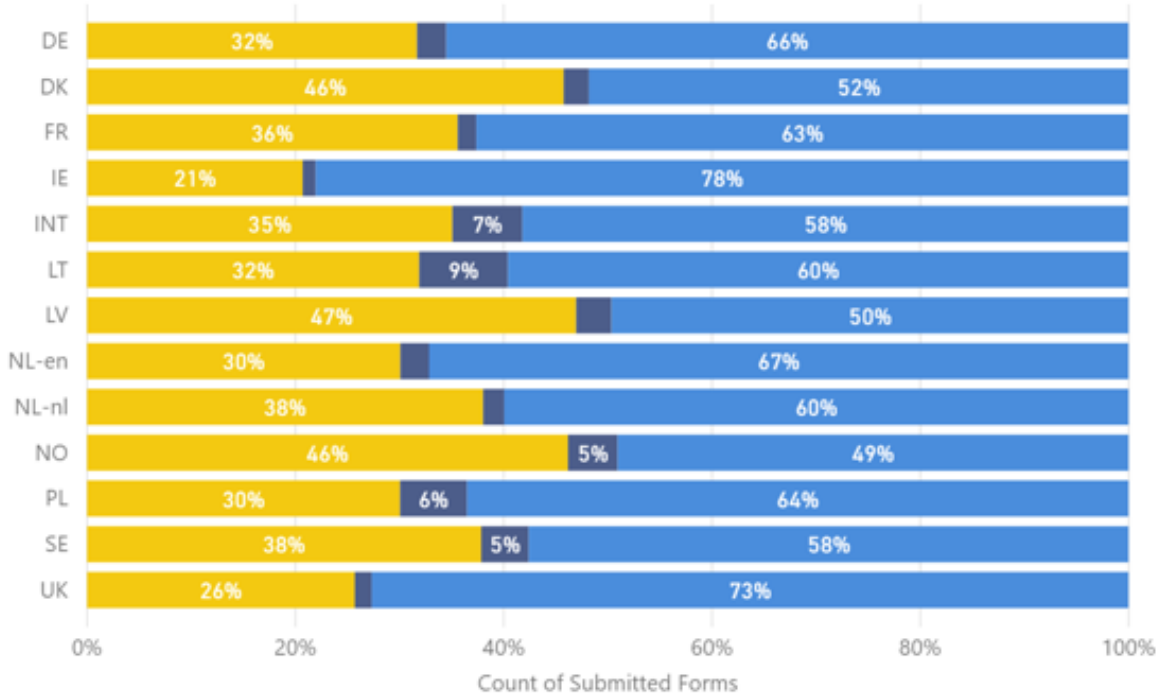
I will be more likely to consider ferry travel in preference to air travel

● No change ● No, less likely ● Yes, more likely

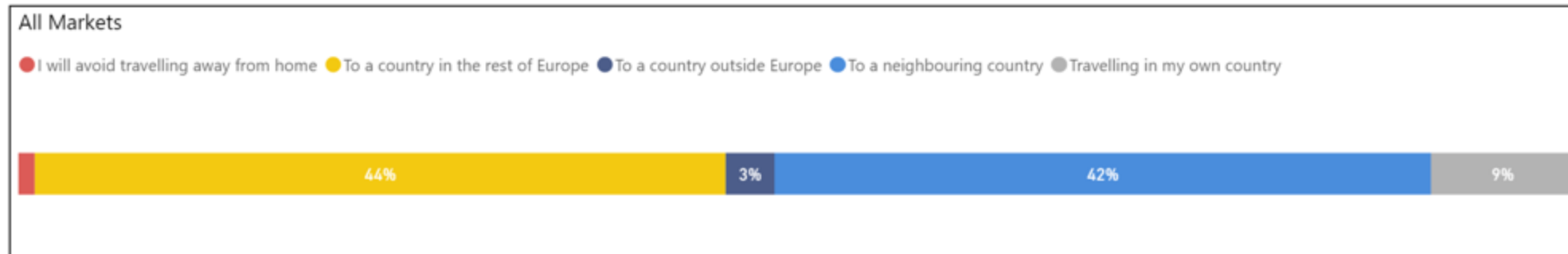
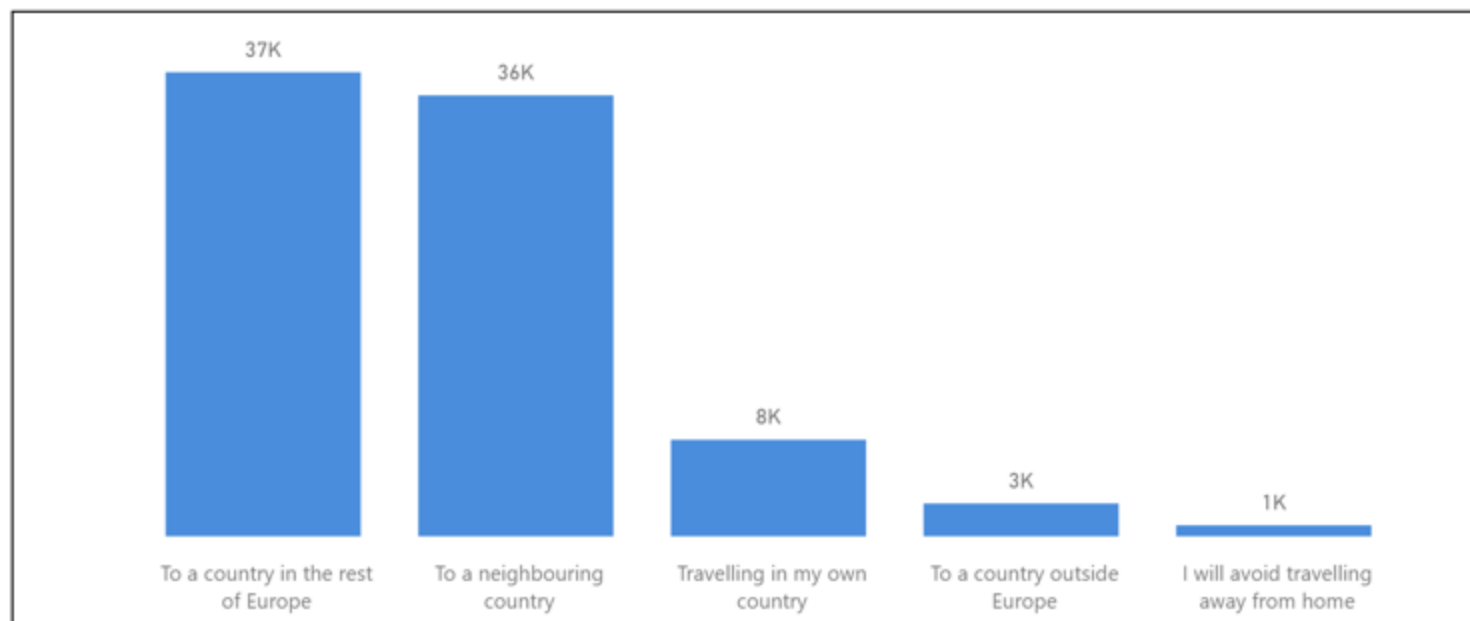


I will be more likely to consider ferry travel in preference to air travel

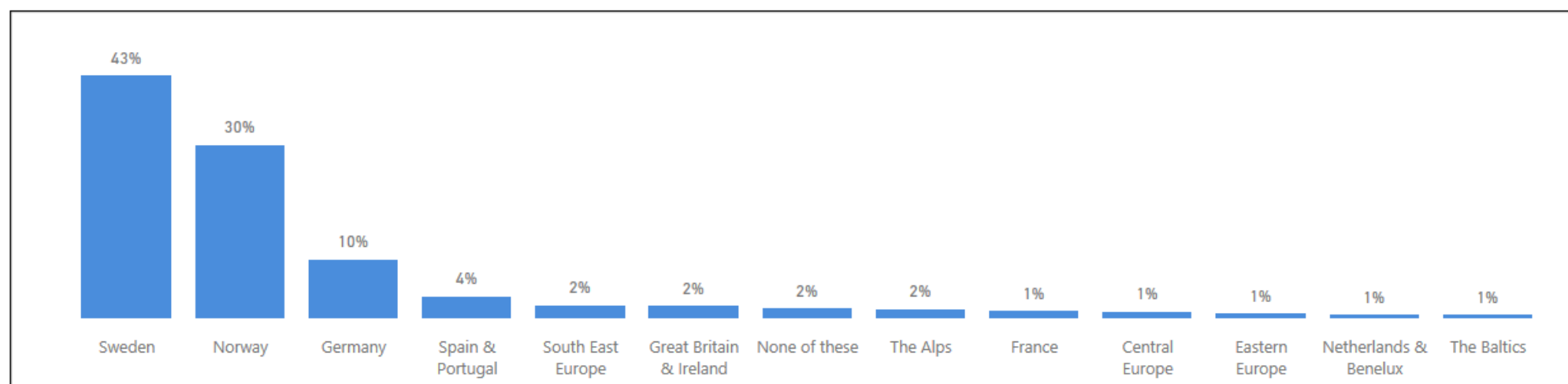
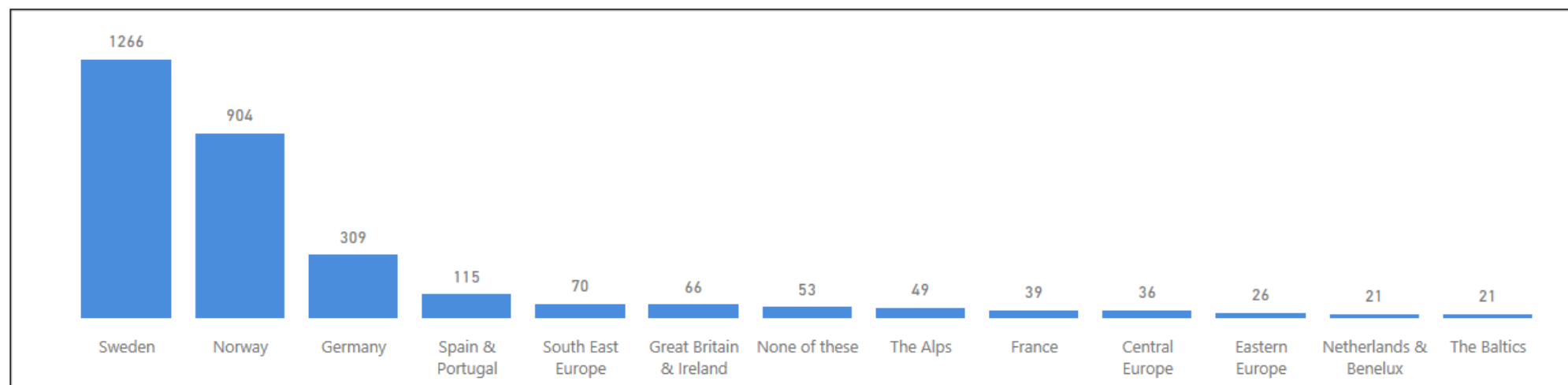
● No change ● No, less likely ● Yes, more likely



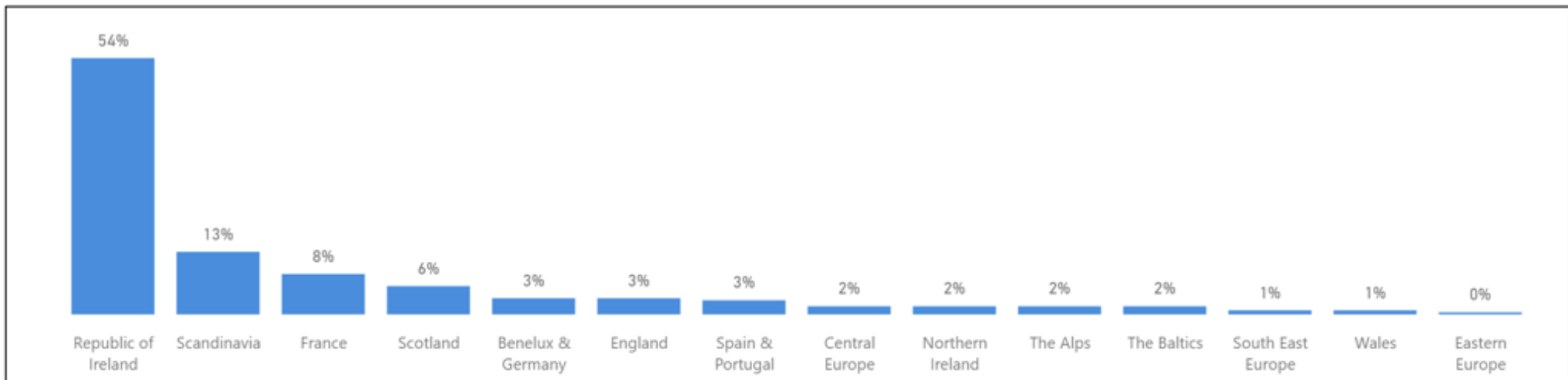
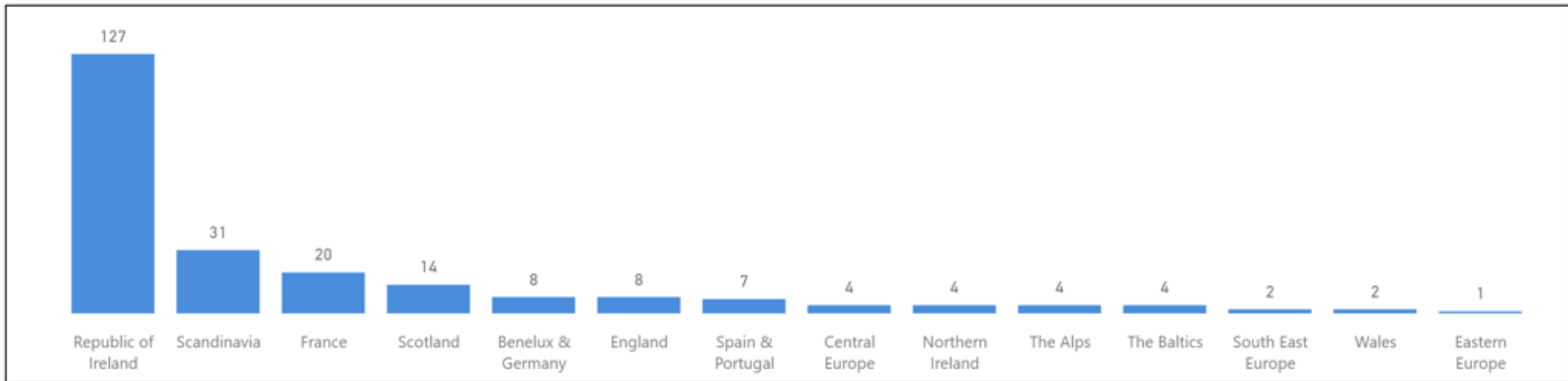
Assuming that travel to another country is permitted, where are you planning to go the next time you travel?



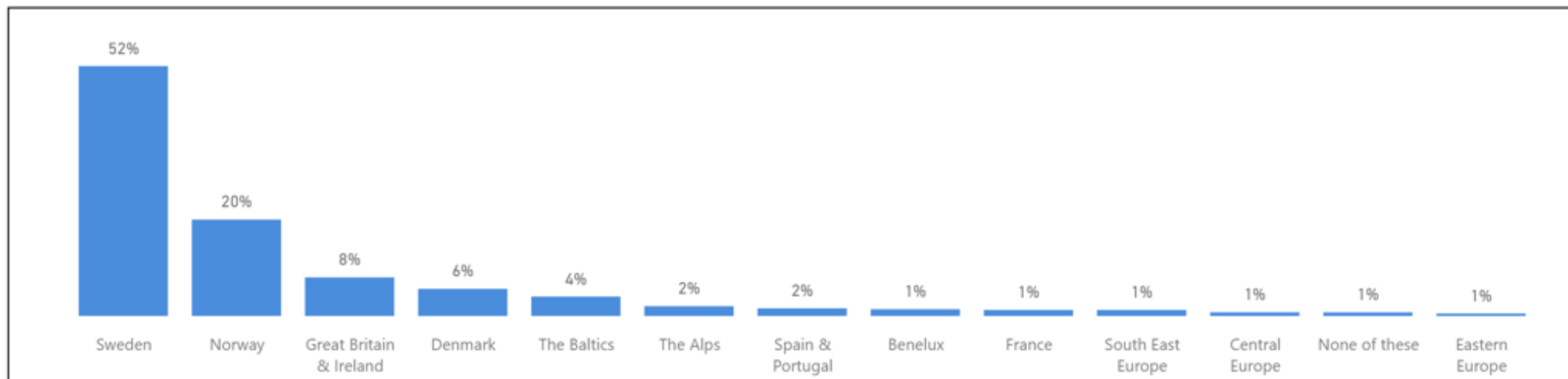
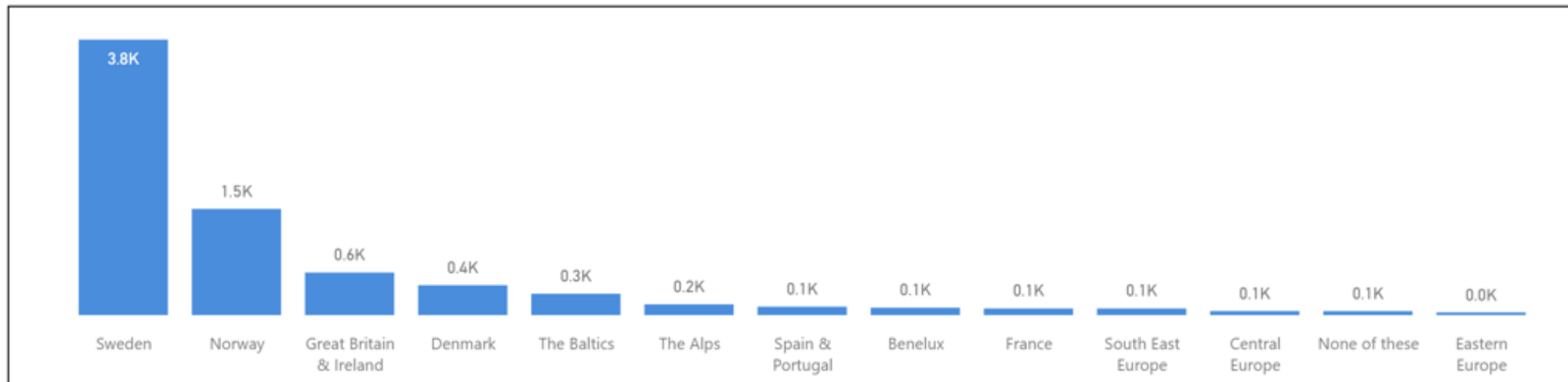
Please select the country/area you are planning to visit the next time you travel: DANISH MARKET



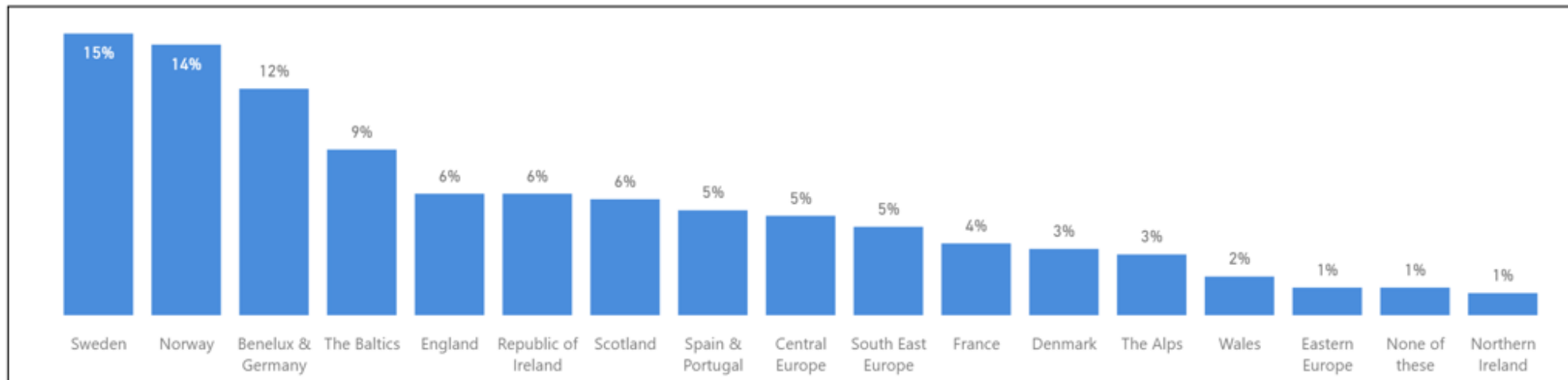
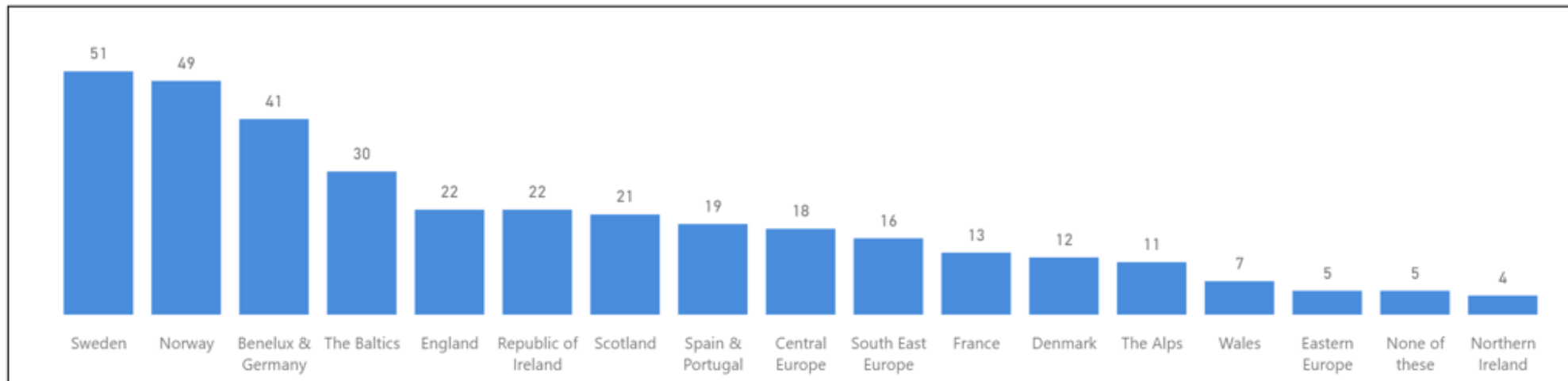
Please select the country/area you are planning to visit the next time you travel: FRENCH MARKET



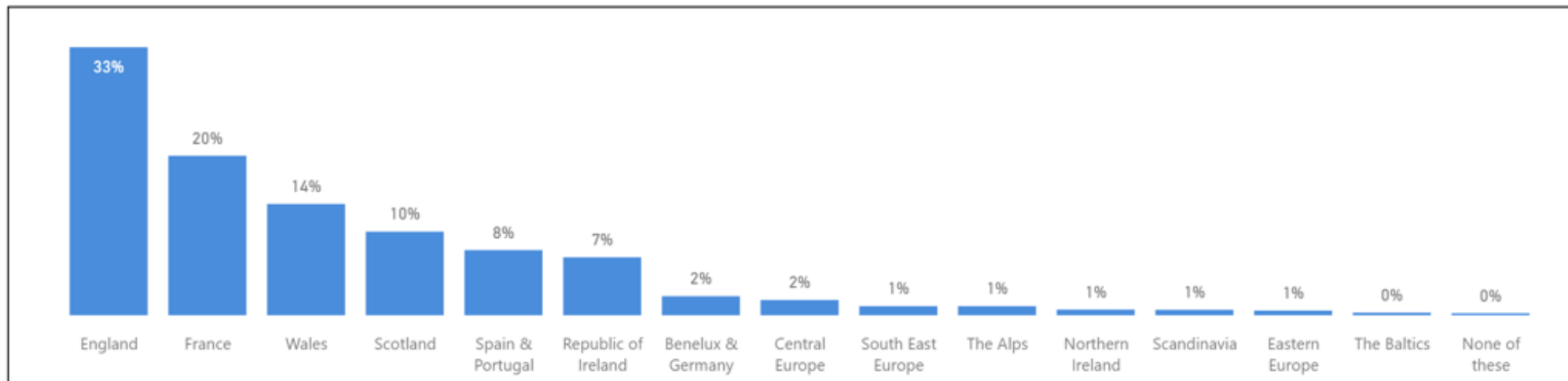
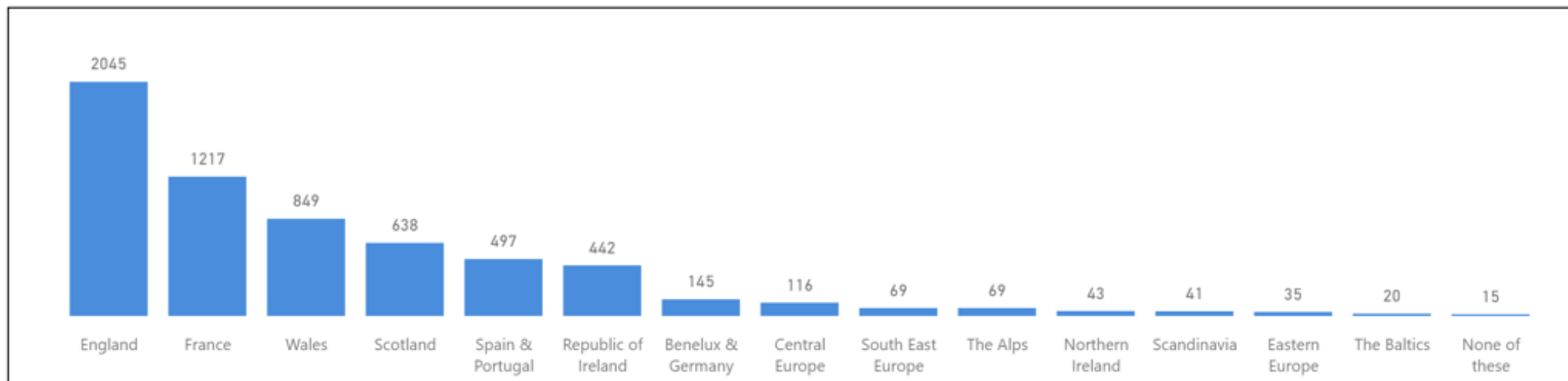
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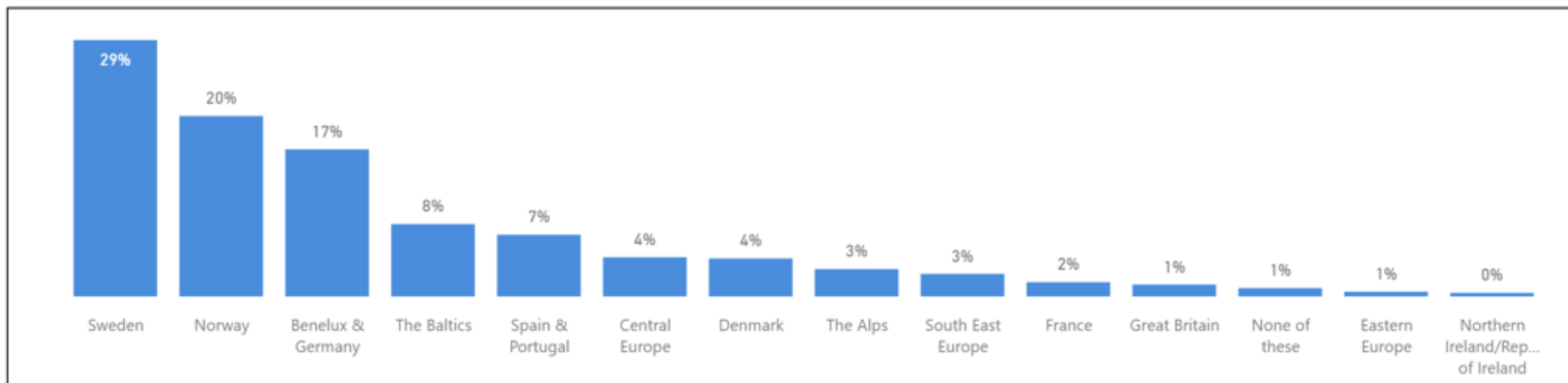
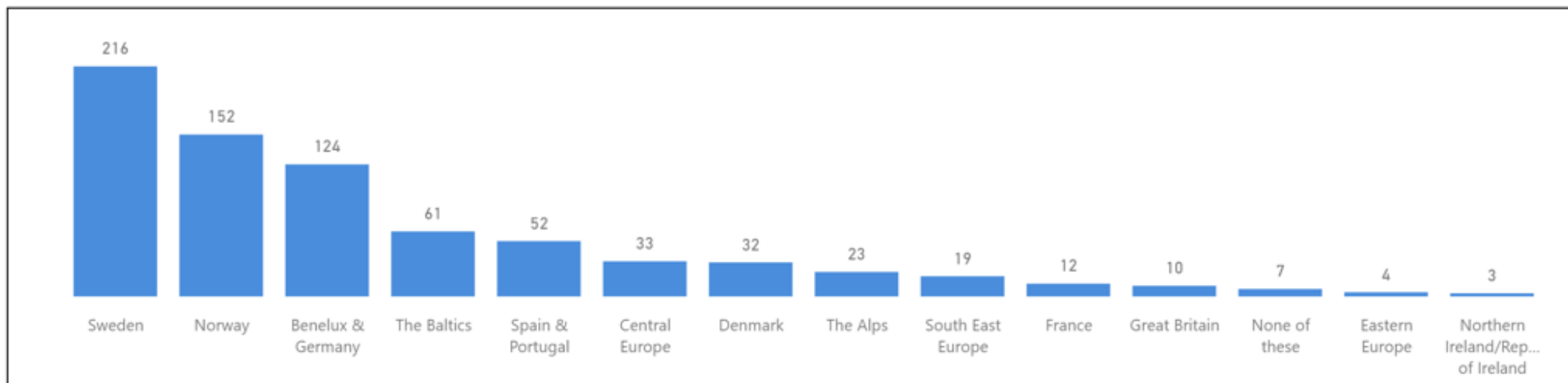
Please select the country/area you are planning to visit the next time you travel: INTERNATIONAL MARKET



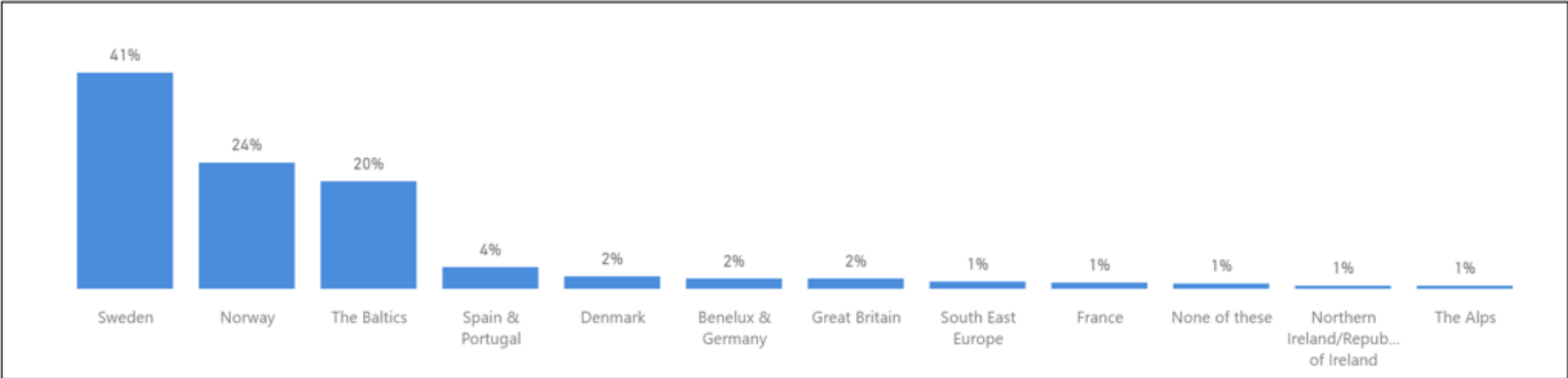
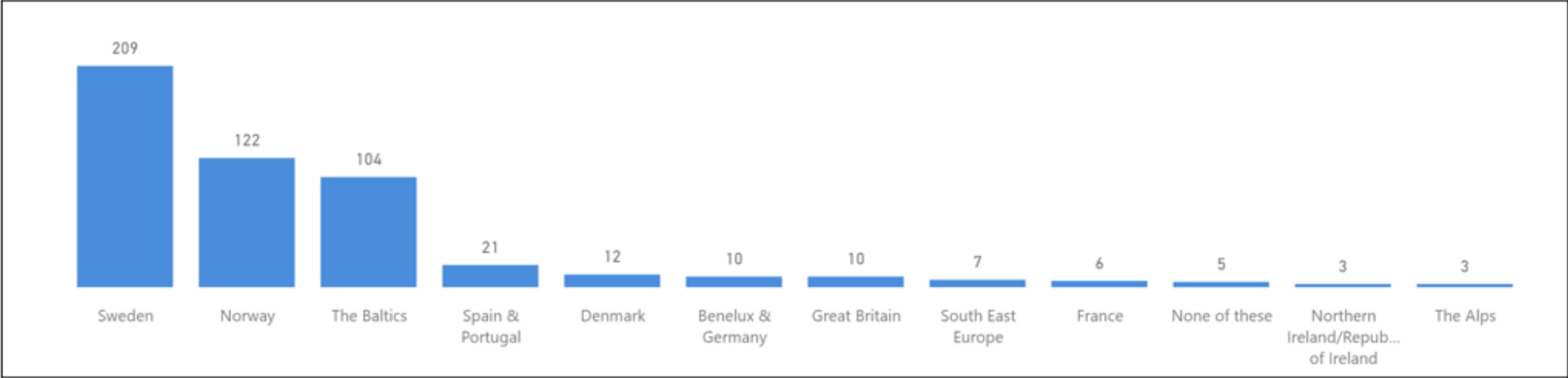
Please select the country/area you are planning to visit the next time you travel: IRISH (ROI) MARKET



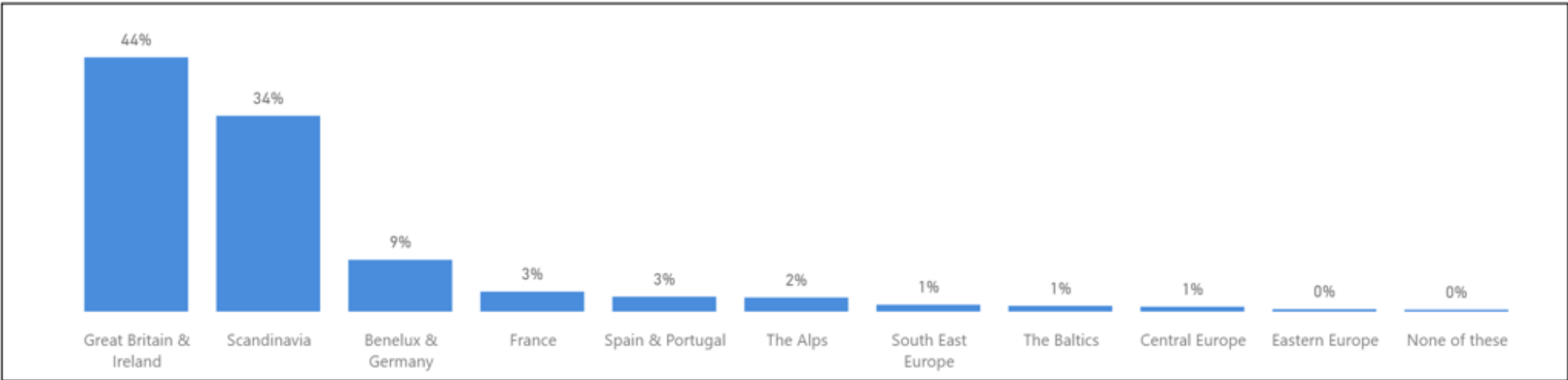
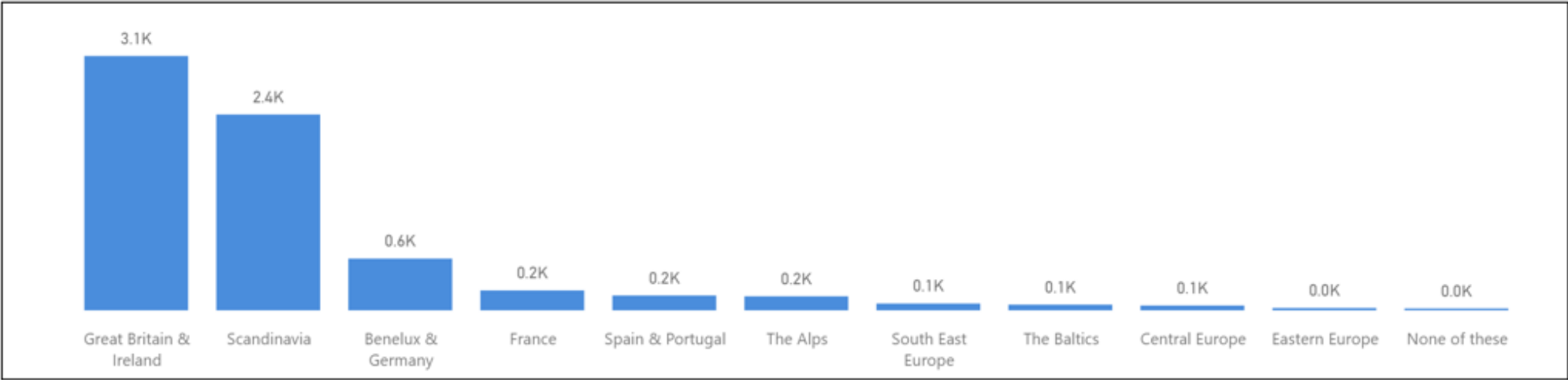
Please select the country/area you are planning to visit the next time you travel: LATVIAN MARKET



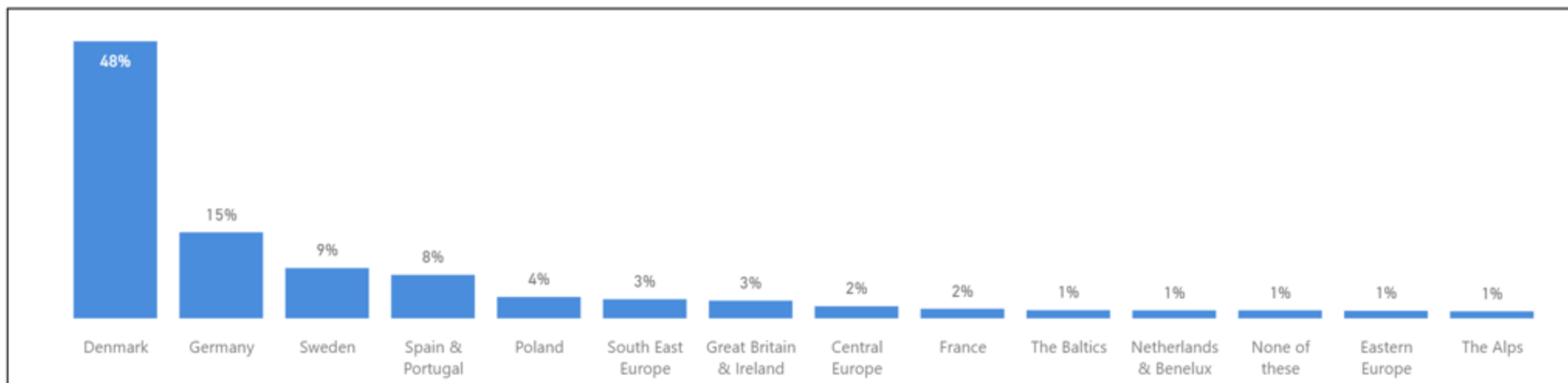
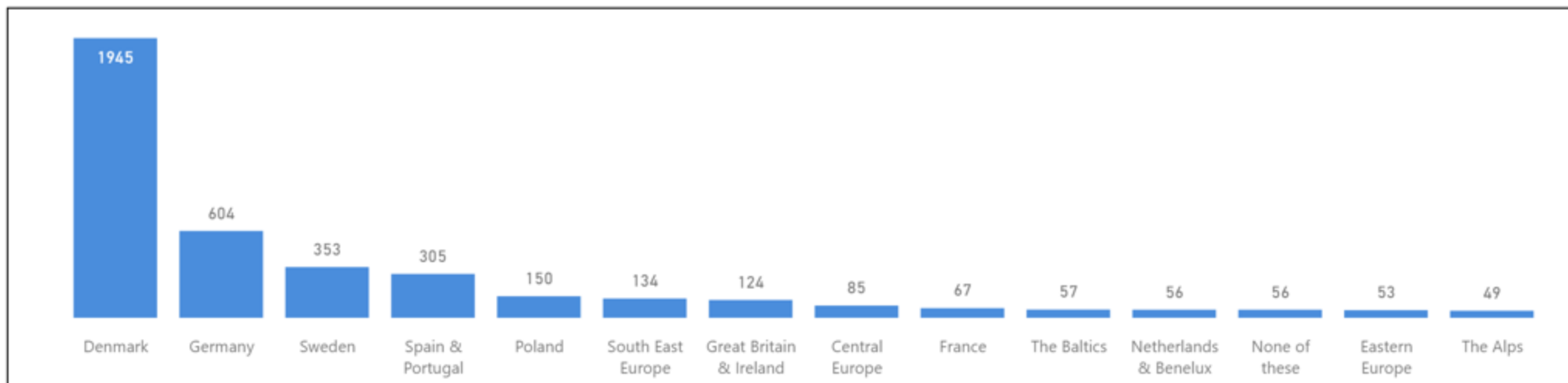
Please select the country/area you are planning to visit the next time you travel: LITHUANIAN MARKET



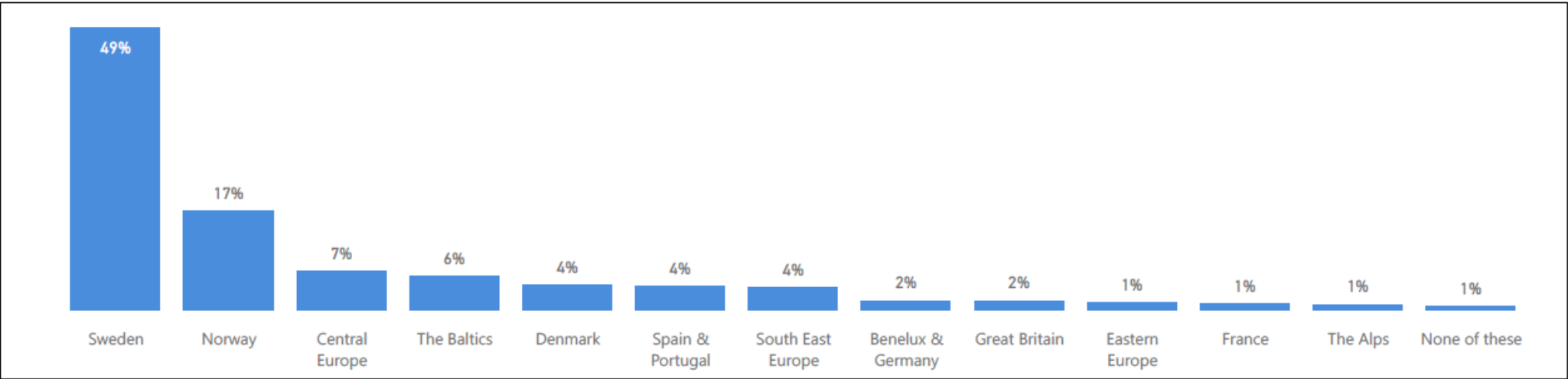
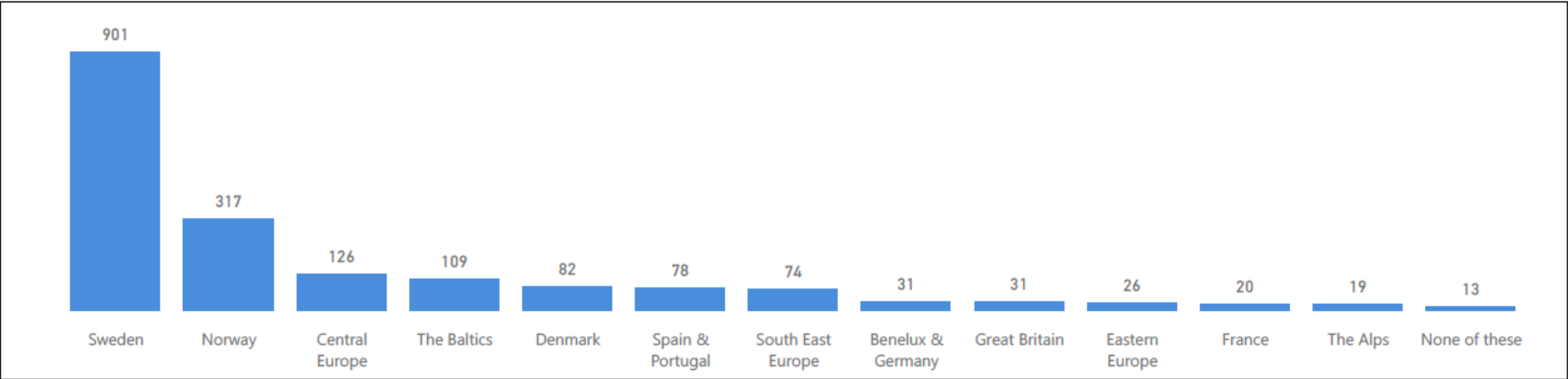
Please select the country/area you are planning to visit the next time you travel: NETHERLANDS MARKET



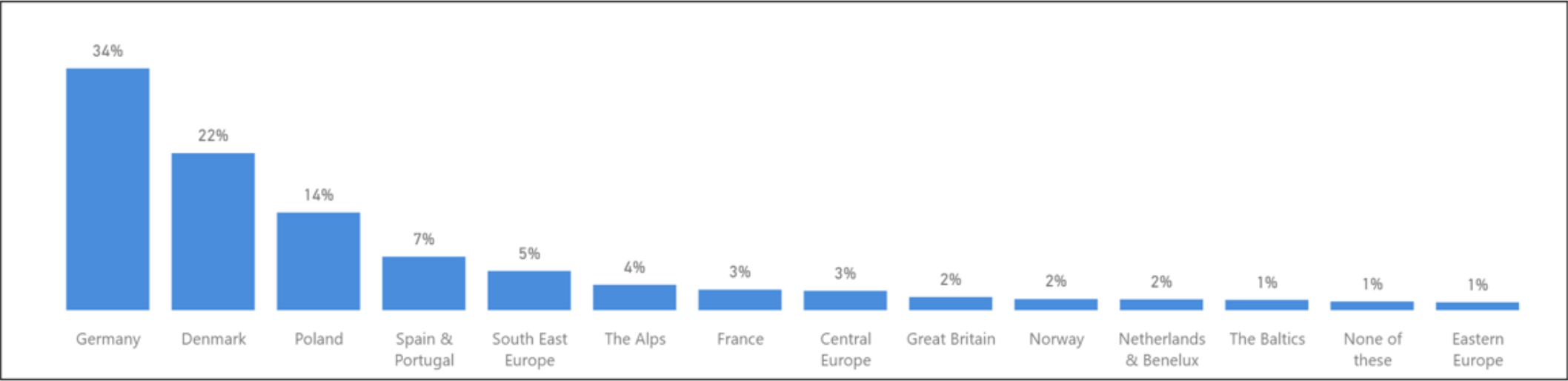
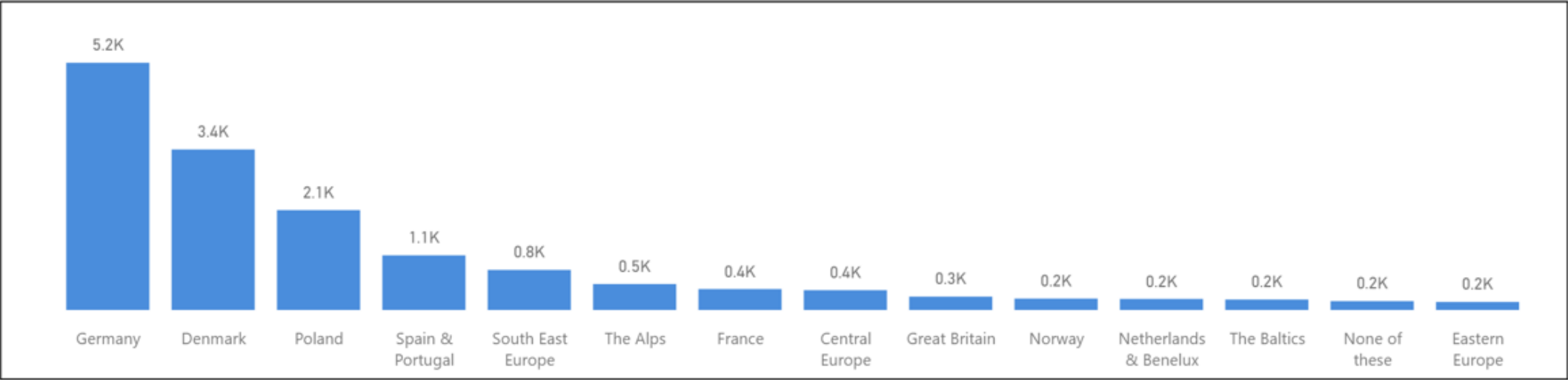
Please select the country/area you are planning to visit the next time you travel: NORWEGIAN MARKET



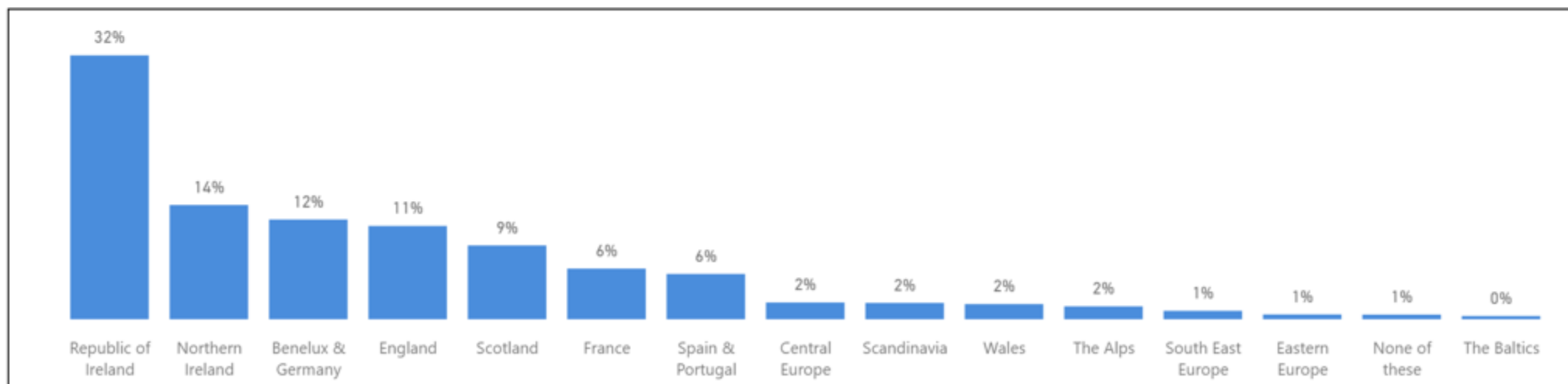
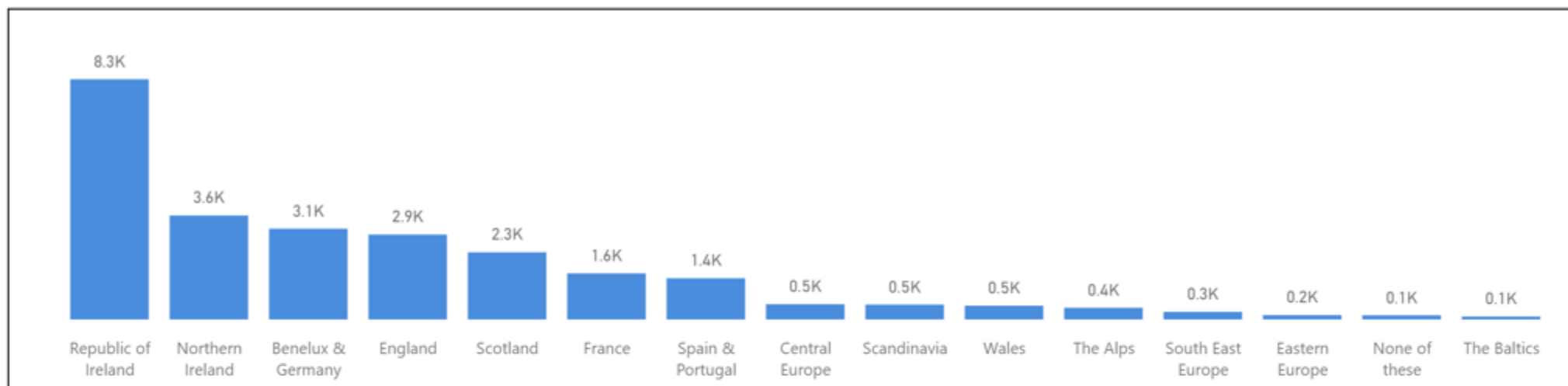
Please select the country/area you are planning to visit the next time you travel: POLISH MARKET



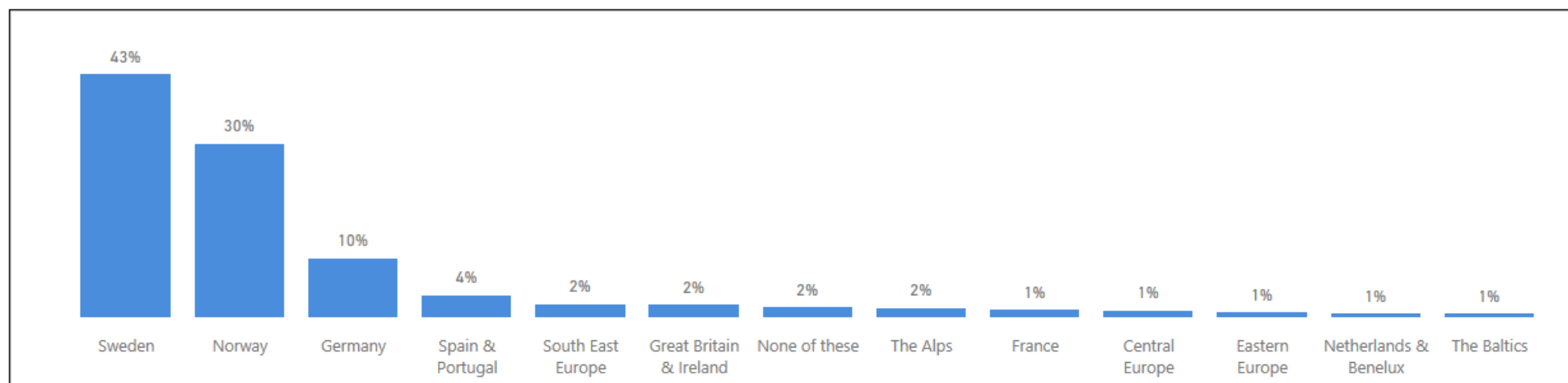
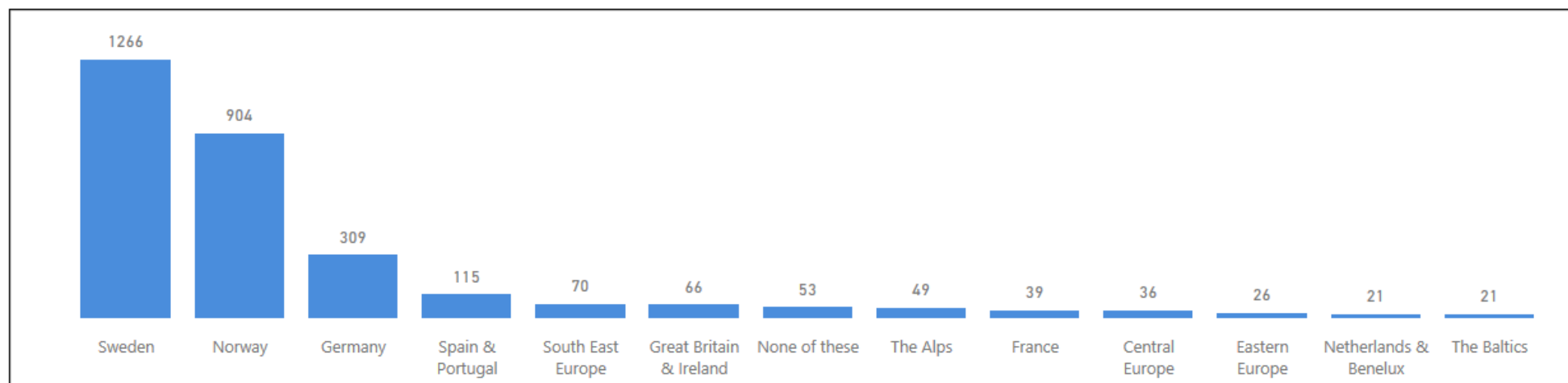
Please select the country/area you are planning to visit the next time you travel: SWEDISH MARKET



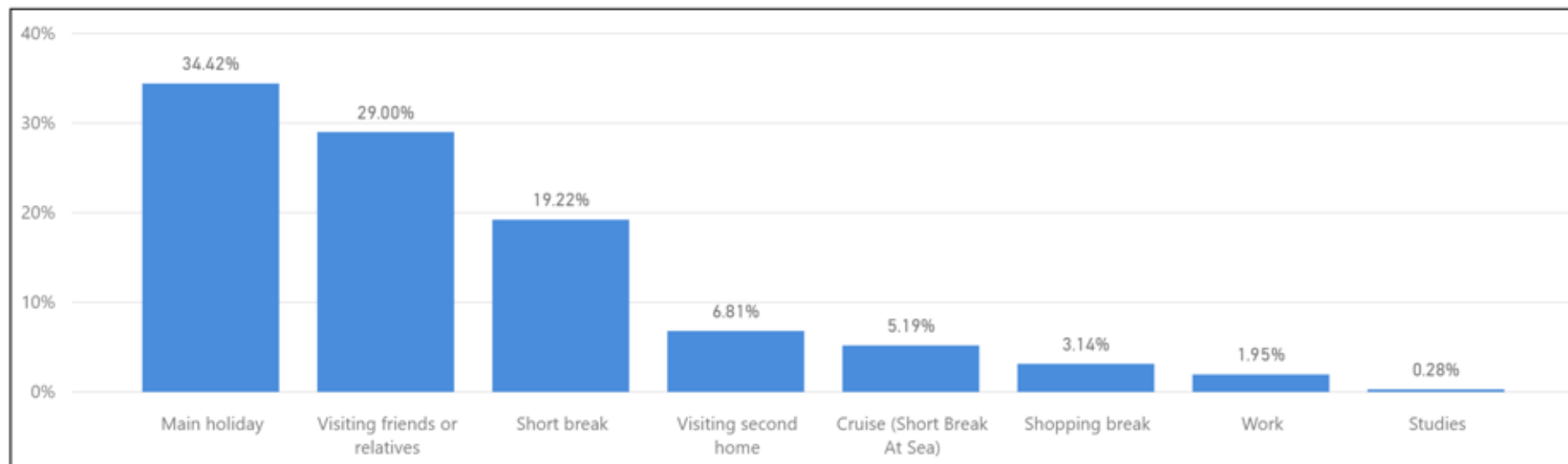
Please select the country/area you are planning to visit the next time you travel: UK MARKET



Please select the country/area you are planning to visit the next time you travel: DANISH MARKET



Which kind of trip are you most looking forward to?



Work
Main holiday
Studies
Short break
Shopping break
Visiting friends or relatives
Visiting second home
Cruise Short Break At Sea

When choosing how you will travel, please rate on a scale of 1 to 5 the importance to you of the following:

Attribute	1	2	3	4	5
Avoiding airports	20%	11%	28%	13%	27%
Being able to bring as much luggage as I want	5%	6%	21%	23%	45%
Being able to bring my own bicycle or sports equipment	47%	12%	15%	8%	17%
Being able to bring my own car/vehicle	13%	4%	11%	14%	57%
Being able to choose flexible tickets in case my plans change at short notice	4%	4%	15%	23%	54%
Being able to decide to travel at short notice	4%	5%	19%	26%	45%
Freedom to move around during the journey/crossing	4%	4%	16%	25%	50%
Fresh air circulation on board and ability to go out on deck	3%	3%	11%	23%	60%
Information provided by the transport company about social distancing, hygiene etc	6%	5%	18%	21%	50%
Reducing environmental impact	7%	7%	27%	24%	34%

1 = Not important at all
5 = Very important

Going forward, are you more or less likely to travel by the following transport methods:

Transport Method	Less likely	More likely	No change
By air	60%	4%	35%
By car	8%	55%	37%
By coach	60%	5%	34%
By ferry on foot	33%	22%	44%
By ferry with my car or other vehicle	4%	62%	33%
By rail	49%	14%	37%

Transport Method	Less likely	More likely	No change
By air	48,714	3,488	28,706
By car	6,267	44,673	29,953
By coach	48,753	4,381	27,573
By ferry on foot	27,073	18,035	35,630
By ferry with my car or other vehicle	3,570	50,533	26,957
By rail	39,587	11,206	29,950

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