MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

09/20 | WAVE 1
This report examines and monitors sentiment and short-term intentions for domestic and intra-regional travel of European citizens from 10 high-volume source markets in light of the COVID-19 crisis, and is the first out of six waves of market research, conducted in August 2020 onwards.

- Europeans demonstrate an optimistic sentiment towards travel; 54% of respondents intend to take a trip in the next 6 months while 26% state that they plan to travel until November 2020. Travel in Europe is a top choice with 41% intending to travel within their own country and 39% to other European destinations. Only 11% consider a trip outside Europe in the next months.

- The large majority of respondents who are more eager to travel, domestically or within Europe, in the next 6 months, will plan a leisure trip (66%). Other purposes include Visiting Friends and Relatives (19%) and Business Travel (9%).
Sea, sun and beach (25%), city break (19%) as well as nature and outdoors (16%) are the most appealing types of leisure trips among respondents eager to travel in the next 6 months.

Respondents exhibiting a greater interest in city breaks are the ones most likely to travel sooner.

The majority of respondents who planning short-term trips intend to travel, domestically or within Europe, either with their partner (37%) or with their family (36%). Only, a fragment will travel with friends (13%) or solo (10%).
Finding a treatment/vaccine for COVID-19 is expected to have only a mildly positive impact on travel, at least for the short-term, as only 44% of respondents state that they intend to plan their pre COVID-19 trip immediately after a treatment or vaccine has been found.

Quarantine measures during a trip (15%), rising numbers of COVID-19 cases (12%) or getting ill at the destination (11%) as well as changing travel restrictions (10%), are the primary concerns for “early bird” travellers.

With regard to personal health, air travel is considered the less safe part of a journey (20%) with fewer than 50% of respondents stating that they intend to travel by plane on their next trip*.

The substantial climate of uncertainty is also highlighted by the large part of respondents (32%) that have not yet made a decision as to when they will take their next trip.

*According to UNWTO data, in 2018 the share of air travel in tourism was 58%.
• No factor is more important than flexible cancellation policies (11%) for travel decision making among respondents with short-term plans.
• Europeans ask primarily for health and safety (21%) for their next travels but peace of mind & relaxation (14%) as well as affordability (13%) of a trip are also keys for a highly sought-after travel experience.
• Travel motivation is resilient; as countries heavily affected by COVID-19 (i.e. Spain, Italy) are still among the most popular destinations and their citizens have a strong intention to travel, a COVID-19 outbreak does not necessarily mean that desire for travel has faded away.
European destinations should focus on existing demand for domestic and intra-European travel. Destinations heavily dependent on air travel will need to rethink their short-term marketing strategies, source markets and target/niche audiences.

To make travelling simple and reduce uncertainty, destinations should proactively communicate information regarding travel restrictions, health and safety measures as well as conveying a “business as usual” message, through NTBs and DMOs digital assets.

Strong destination brands lead to image resilience and enhanced travel demand. NTOs should further invest in branding and marketing, to ensure optimal resilience amidst present and future crises, despite potentially reduced budgets.

With two-thirds of travellers using online data sources for trip planning, destinations should increase the share of digital marketing focusing on travel review websites and encouraging visitors to share positive experiences online.
• **Flexibility is now the new luxury** and having flexible and straightforward cancellation policies will be critical for both B2C and B2B. Businesses that are able to maximise flexibility will emerge stronger compared to their competitors.

• With ‘peace of mind’ as a top travel quality, businesses that can manage the customer experience accordingly throughout the entire visitor journey and ensure ‘carefree travel’ are expected to recover faster.

• As different markets and segments respond differently to the COVID-19 crisis, **data-driven marketing** is now becoming more important than ever. One segment with particularly strong potential is family travellers, especially among consumers aged 35-54.

• With digital bookings on the rise, businesses should insist in investing in digital marketing and in engaging with travellers along all stages of the **digital visitor journey**.
1. To present insights, findings and statistics, the following distinct groups have been analysed depending on the topic and should be used as a reference:
   • Total respondents; 5,762
   • Respondents with short-term travel plans/ most likely to travel in the next 6 months; 3,086
   • Respondents selecting outbound European destinations; 3,915

2. To present the timing in which respondents are most likely to take their next trip, the following time periods should be used as a reference:
   • This month; August – September 2020.
   • In 1-2 months; during September – November 2020.
   • In 3-4 months; during November 2020 – January 2021.
   • In 5-6 months; during January - March 2021.

3. All data, statistics, findings and insights refer to domestic and intra-European travel, unless otherwise stated.
The impact of COVID-19 vaccine will not be instant; less than half of respondents plan to re-schedule their pre-COVID-19 trip immediately after a vaccine is found.

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

- Spain: 61.8%
- Poland: 57.4%
- UK: 48.4%
- France: 43.3%
- Italy: 51.2%

Q6. To what extent do you agree/ disagree with the following statement: “when a treatment/ vaccine for COVID-19 is found, I will immediately book or reschedule the trip I had planned pre-COVID-19”

- Likely/Very Likely: 25.2%
- Neutral: 44.0%
- Unlikely/Very Unlikely: 30.8%

No. of respondents: 5,762
Optimism about travel remains with over half of respondents intending to take a trip, domestically or within Europe, in the next 6 months.

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

- **Poland**: 74.2%
- **Italy**: 57.8%
- **Germany**: 52.8%
- **Austria**: 52.8%
- **Spain**: 54.4%

Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?
By comparison with other age groups, Gen Z respondents (aged 18-24) seem the least likely to travel. Gen Zers prize fun and adventure in their travel experiences and for many destinations both of these elements are currently a challenge.
“City life enthusiasts” (respondents that enjoy city breaks) are the most likely to resume travel first.
More than 1 out 4 respondents intend to travel until November 2020 having either domestic or intra-European trips as top choices

Q9. When are you most likely to go on your next trip either in your country or within Europe?
No. of respondents: 5,762

Q10. Where do you plan to travel in the next 6 months?
No. of respondents: 5,762
Q11. To which country(ies) do you plan to travel next?

PREFERRED COUNTRIES FOR INTRA-EUROPEAN TRAVEL
Which countries respondents intend to visit next

TOP 10 COUNTRIES

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Spain</td>
<td>7.8%</td>
</tr>
<tr>
<td>France</td>
<td>7.3%</td>
</tr>
<tr>
<td>Italy</td>
<td>7.3%</td>
</tr>
<tr>
<td>Greece</td>
<td>6.2%</td>
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<tr>
<td>Germany</td>
<td>6.0%</td>
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<tr>
<td>Portugal</td>
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</tr>
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<td>United Kingdom</td>
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<tr>
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<td>Austria</td>
<td>3.4%</td>
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<tr>
<td>Netherlands</td>
<td>3.3%</td>
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</table>

No. of respondents: 3,915
Vacations only; respondents choose leisure and visiting friends and relatives for their next trip

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

No. of respondents: 3,086
The most popular destinations for sea, sun and beach are Spain, Italy and France.

The most sought-after destinations for city break are Germany, France and Italy.

The most preferred destinations for nature and outdoors are France, Italy and Germany.

Respondents are still dreaming of their summer vacations with sea, sun and beach being on top of mind for their next holiday.

Prefered type of leisure trip for respondents most likely to travel in the next 6 months:

- **25.3%** Sea, Sun & Beach
- **14.7%** Culture & Heritage
- **19.2%** City Break
- **15.6%** Nature & Outdoors
- **14.0%** Culinary / Food & Wine
- **3.7%** Touring & Road Trip
- **3.3%** Ski/Snowboard Trip in the Mountains
- **8.5%** Wellness & Relaxation

Q17. What type of leisure trip within Europe are you most likely to undertake next?

No. of respondents: 3,086
Q17. What type of leisure trip within Europe are you most likely to undertake next?

Sea, sun and beach is more popular among UK respondents, city breaks among respondents from Spain. Nature is top of mind among Germans while Italians favor culture the most.
GERMANY

More than 1 in 2 respondents intend to travel in the next 6 months having similar preference for domestic and European destinations

Willingness to travel in the next 6 months

When will Germans travel

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>26.8%</td>
<td>20.4%</td>
<td>52.8%</td>
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No. of respondents: 750

<table>
<thead>
<tr>
<th>This month</th>
<th>In 1-2 months</th>
<th>In 3-4 months</th>
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</thead>
<tbody>
<tr>
<td>7.6%</td>
<td>24.1%</td>
<td>27.3%</td>
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<table>
<thead>
<tr>
<th>In 5-6 months</th>
<th>I don’t know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.8%</td>
<td>20.1%</td>
</tr>
</tbody>
</table>

No. of respondents: 750

For specific dates please refer to slide 9

Where will Germans travel within the next 6 months

<table>
<thead>
<tr>
<th>Within my country</th>
<th>To another European country</th>
<th>To destinations outside Europe</th>
<th>Do not know yet</th>
</tr>
</thead>
<tbody>
<tr>
<td>39.7%</td>
<td>39.9%</td>
<td>12.0%</td>
<td>8.4%</td>
</tr>
</tbody>
</table>

No. of respondents: 750

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

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

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

More than 4 in 10 respondents are uncertain as to the timing of their next trip, while they show a stronger preference for domestic destinations.

**Willingness to travel in the next 6 months**

- Likely/Very Likely: 34.3%
- Neutral: 20.9%
- Unlikely/Very Unlikely: 44.8%

**When will British travel**

- In 1-2 months: 41.2%
- In 3-4 months: 18.1%
- In 5-6 months: 16.8%
- This month: 19.5%
- I don’t know yet: 4.4%

**Where will British travel within the next 6 months**

- Within my country: 41.3%
- To another European country: 33.8%
- To destinations outside Europe: 9.1%
- Do not know yet: 15.8%

Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?
Q8. When are you most likely to go on your next trip either in your country or within Europe?
Q10. Where do you plan to travel in the next 6 months?

No. of respondents: 750

For specific dates please refer to slide 9.
FRANCE

1 in 2 respondents intend to travel in the next 6 months, mostly in their own country

Willingness to travel in the next 6 months

When will French travel

Where will French travel within the next 6 months

No. of respondents: 750

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

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

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

For specific dates please refer to slide 9
**NETHERLANDS**

More than 1 in 2 respondents intend to travel in the next 6 months and by a large majority will visit other European destinations

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**Willingness to travel in the next 6 months**

- Likely/Very Likely: 51.0%
- Neutral: 22.0%
- Unlikely/Very Unlikely: 27.0%
- 0.0%

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**When will Dutch travel**

- This month: 6.1%
- In 1-2 months: 19.1%
- In 3-4 months: 35.0%
- In 5-6 months: 17.0%
- I don’t know yet: 22.9%

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**Where will Dutch travel within the next 6 months**

- Within my country: 30.1%
- To another European country: 43.5%
- To destinations outside Europe: 12.6%
- Do not know yet: 13.8%

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

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

Q10. Where do you plan to travel in the next 6 months?
ITALY
Almost 6 in 10 respondents intend to travel in the next 6 months, by a vast majority inside their own country

Willingness to travel in the next 6 months

- Likely/Very Likely: 20.4%
- Neutral: 21.9%
- Unlikely/Very Unlikely: 57.8%

No. of respondents: 750

When will Italians travel

- This month: 14.7%
- In 1-2 months: 19.3%
- In 3-4 months: 5.7%
- In 5-6 months: 34.4%
- I don’t know yet: 25.9%

No. of respondents: 750

For specific dates please refer to slide 9

Where will Italians travel within the next 6 months

- Within my country: 54.4%
- To another European country: 30.5%
- To destinations outside Europe: 7.1%
- Do not know yet: 8.0%

No. of respondents: 750

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

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

Q10. Where do you plan to travel in the next 6 months?
Almost 1 in 2 respondents intend to travel in the next 6 months, and the majority are eager to visit another European country.

When will Belgians travel

- This month: 9.6%
- In 1-2 months: 17.4%
- In 3-4 months: 17.8%
- In 5-6 months: 33.2%
- Do not know yet: 22.0%

Wave 1

Likely/Very Likely: 32.2%
Neutral: 18.8%
Unlikely/Very Unlikely: 49.0%

No. of respondents: 500

For specific dates please refer to slide 9

Where will Belgians travel within the next 6 months

- Within my country: 27.4%
- To another European country: 48.1%
- To destinations outside Europe: 12.5%
- Do not know yet: 12.0%

No. of respondents: 500
Nearly 1 in 2 respondents intend to travel in the next 6 months and tend to be more confident with respect to the timing of the trips planned.

**Willingness to travel in the next 6 months**

- Likely/Very Likely: 50.5%
- Neutral: 21.8%
- Unlikely/Very Unlikely: 27.7%

**When will Swiss travel**

- This month: 9.1%
- In 1-2 months: 23.5%
- In 3-4 months: 26.0%
- In 5-6 months: 18.6%
- I don’t know yet: 26.0%

**Where will Swiss travel within the next 6 months**

- Within my country: 30.2%
- To another European country: 45.0%
- To destinations outside Europe: 15.4%
- Do not know yet: 9.4%

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

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

Q10. Where do you plan to travel in the next 6 months?
More than 1 in 2 respondents intend to travel over the next 6 months, mainly favoring domestic destinations

Willingness to travel in the next 6 months

When will Spanish travel

Where will Spanish travel within 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?

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

Q10. Where do you plan to travel in the next 6 months?
The most avid travellers with 3 in 4 of respondents intending to travel soon and with a strong desire for outbound travel.
AUSTRIA

More than 1 in 2 respondents intend to travel in the next 6 months showing a similar preference for domestic and European destinations

Willingness to travel in the next 6 months

When will Austrians travel

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Likely/Very Likely</th>
<th>Neutral</th>
<th>Unlikely/Very Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>30,0%</td>
<td>17,2%</td>
<td>52,8%</td>
</tr>
</tbody>
</table>

No. of respondents: 500

Where will Austrians travel within the next 6 months

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within my country</td>
<td>40,7%</td>
</tr>
<tr>
<td>To another European country</td>
<td>38,2%</td>
</tr>
<tr>
<td>To destinations outside Europe</td>
<td>8,6%</td>
</tr>
<tr>
<td>Do not know yet</td>
<td>12,5%</td>
</tr>
</tbody>
</table>

No. of respondents: 500

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

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

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

For specific dates please refer to slide 9
TRIP PLANNING
The majority of respondents with short-term travel plans, intend to travel either with their partner or family.

Respondents between the ages of 35-54 are most likely to travel with their family, while respondents over the age of 55 with their partner.

Travelling with family (39%) or a partner (38%) is more common for domestic trips, while solo travel is strongly preferred (20%) among respondents who intend to visit destinations outside of Europe.

Q16. With whom are you most likely to travel during your next trip within Europe?

No. of respondents: 3,086
Travel review websites are the major source of information but hotels/destinations’ digital assets and recommendations from friends are also taken into account.

2 out of 3 respondents will rely on digital sources when planning their next trip.

Preferred source of information for respondents most likely to travel in the next 6 months:

- Travel review websites: 21.3%
- A hotel’s website or social media: 12.1%
- Recommendations from friends: 11.5%
- Destination’s website or social media: 11.0%
- Travel agent/tour operator: 10.0%
- An airline’s website or social media: 7.9%

Q12. What sources of information will you use the most when planning your next trip?

No. of respondents: 3,086
Online booking through OTAs and search engines prevails followed by direct bookings via accommodation/airline websites. While digital booking is equally common among all age groups, the respondents over the age of 54 show a slightly higher preference for direct online booking.

Q13. How will you book your next trip within Europe?

- Online booking engine (47.3%)
- Direct booking via accommodation/airline website (26.6%)
- Travel agent/travel designer (12.6%)
- Package holiday through a Tour Operator (8.7%)
- Corporate travel office (4.8%)

NB: Sampling carried out through online survey thus it may contain bias towards digital usage.

No. of respondents: 3,086
While air flight remains the leading mode of transport, driving an owned car is not falling far behind.

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

- **Spain**: 71.7%
- **UK**: 67.0%
- **Italy**: 61.2%
- **France**: 56.6%
- **Poland**: 52.6%
Respondents from Spain, Austria, UK and Italy are the most likely to stay at a hotel or a resort (chain/ independent)

Camping and caravan travel are most popular among respondents from the Netherlands, Belgium and Germany

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

- Hotel chain or resort: 31.3%
- Independent hotel/resort: 24.7%
- Hostel/motel: 14.1%
- Friends and/or family: 12.3%
- Short-term rental via online platform: 8.7%
- Other paid serviced accommodation (i.e. bed and breakfast, parador, etc.): 4.2%
- Camping/caravan: 3.2%
- Other: 1.4%

Q15. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

No. of respondents: 3,086
The term “Travel Qualities” refers to the nature, traits and characteristics of the travel experience sought by consumers.

Health and safety are by far the most important travel qualities while peace of mind, relaxation and affordability are also rated highly.

- **20.9%** Health & Safety
- **13.8%** Relaxation & Peace of mind
- **12.6%** Affordability
- **10.0%** Comfort
- **6.1%** Discovery
- **5.6%** Privacy

No. of respondents: 5,762
Is COVID-19 truly a trip killer? While a majority of respondents cancelled their short-term travel plans, a significant portion either rescheduled or pivoted trips to domestic destinations.

Q2. If you had planned an overnight trip in the next 6 months within Europe, how does COVID-19 affect your plans?

Respondents aged 35-44 are the most resilient age group, taking their initial trip or making only a few changes.

Top 5 markets which chose a domestic trip over international:

- Austria: 26.2%
- Poland: 22.0%
- Italy: 20.0%
- Spain: 19.8%
- Germany: 19.1%
Finding a vaccine for COVID-19 tops the list of factors in travel decision-making, followed very closely by flexible cancellation policies and the complete lifting in travel/quarantine restrictions.

In an era of uncertainty, **flexible cancellation policies** are a priority for encouraging consumers to book and much more important than offers and deals.

Especially among respondents more eager to travel in the next 6 months, flexibility in cancellation is the single most important factor (10.6%), followed by social distancing in flights/public transport (9.2%) and only then followed by finding a vaccine (8.8%) and fully lifted travel restrictions (8.8%).

Q3. Which factors are currently most important to you when travelling within Europe?

- **Finding a vaccine**: 10.1%
- **Flexible cancellation policies**: 9.9%
- **Fully lifted travel restrictions**: 9.6%
- **Pre-flight rapid COVID-19 tests**: 9.3%
- **Social distancing on flights/public transport**: 9.3%
- **Destinations’ effectiveness managing COVID-19**: 8.5%

No. of respondents: 5,762
SIZING UP TRAVEL ANXIETIES

While quarantine measures is the major issue impacting choices about travelling, health concerns at the destination also figure prominently.

- 14.5% Quarantine measures during my trip
- 12.9% Rising COVID-19 cases in the destinations I want to visit
- 9.5% Transport and accommodation safety measures
- 8.1% Booking and cancellation policies
- 13.0% Becoming ill at the destination
- 10.2% Becoming ill in transit
- 8.7% Changes in travel restrictions to and from my country during my trip
- 7.4% Economic situation and personal finances
TRAVEL CONCERNS OF “EARLY BIRD” TRAVELLERS

Bureaucratic/administrative processes (i.e. quarantine, changes in travel restrictions, booking & cancellation policies) pose a greater concern for respondents with short-term travel plans.
By a wide margin, air travel is considered the least safe part of a trip, healthwise.

Concern regarding air travel increases with age: 51.2% of respondents aged 54+ are concerned by air travel, versus 39.5% in the 18-24 age group.

In-destination transport (i.e. metro, bus, taxi), attractions, tours and activities as well as public spaces and accommodation are also considered important.

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

No. of respondents: 5,762
The tourism industry has been impacted by high uncertainty regarding travellers’ intentions and preferences as well as the ability for cross-border travel. As the sector will move towards recovery, values of these KPI’s are expected to lower.
METHODOLOGICAL ANNEX
METHODOLOGICAL ANNEX

THE SURVEY

- Online market research survey
- Distribution/ data collection period: 27 August 2020 - 15 September 2020
- Consumers with at least 2 overnight trips in 2019 participated in the survey
- 5,762 respondents in total, from 10 high-volume source markets
  - Countries: Germany, United Kingdom, France, Netherlands, Italy, Belgium, Switzerland, Spain, Poland and Austria
  - Languages: English, French, German, Italian, Spanish, Polish and Dutch.
- Research themes examined: Travel personas (1 question), Travel concerns and COVID-19 impact on travel (6 questions), Travel intentions, preferences and trip planning (10 questions), COVID-19 and responsible travel (3 questions)
- 51% of respondents are male and 49% are female
- Number of respondents and age group per source country:

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<thead>
<tr>
<th>Age</th>
<th>UK</th>
<th>IT</th>
<th>ES</th>
<th>AT</th>
<th>FR</th>
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<td>5,762</td>
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Study on Monitoring Sentiment for Intra-European Travel

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Data sources: This report is based on research conducted by MINDHAUS (www.mindhaus.gr) and should be interpreted by users according to their needs.

Please note that while every possible effort has been made to ensure the data in this report is accurate, it is not possible to completely eliminate every margin of error.

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