

MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 5 | 02/21

Co-funded by the European Union

EUROPEAN TRAVEL COMMISSION

WAVE 5
RESEARCH HIGHLIGHTS

This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the **fifth out of six waves of market research**, initiated in September 2020. Responses are collected from European citizens from 10 high-volume source markets in light of the COVID-19 crisis.

- For a second consecutive period, Europeans' travel sentiment for domestic and intra-European trips is recovering; **54% of respondents consider travelling in the coming 6 months**[1] compared to 52% in wave 4.
- Although only 12% of respondents are willing to travel up to the end of March 2021, the outlook for spring and summer 2021 remains positive; **34% of Europeans intend to plan a trip between May and July 2021**.
- Respondents' desire for intra-European travel is also building steadily; **41% now plan to travel to another European country, the highest figure since this series of surveys began**. Another 35% prefer to stay in their own country for their next trip.

[1] Between January and July 2021

WAVE 5
RESEARCH HIGHLIGHTS

- **Leisure remains the primary reason to travel** for 64% of respondents with short-term plans.
- As Europeans are now eyeing the spring and summer season, they show a greater interest in **sun & beach vacations (18%)** and slightly less in **visiting city destinations (16%)**. Culture and heritage trips are still popular for 14% of early-bird travellers[1].
- Consumer sentiment towards air travel also shows signs of improvement; **54% of respondents state that they are willing to travel by plane**, the highest number since the research began. **At the same time, only 16% of Europeans now see flying as a health risk**, down 20% from wave 1.
- **Travelling by car remains the 2nd most preferred transportation option** for 36% of early-bird travellers.

[1] "Early-bird" travellers refers to survey respondents that are most likely to travel in the next 6 months

WAVE 5
RESEARCH HIGHLIGHTS

- **Spain, Italy, France, Greece and Germany are the five most popular European countries to visit,** and this ranking remains unchanged compared to wave 4.
- Respondents continue to show a **clear preference for digital sources, either for trip planning or booking;** Travel review websites (17%) and online booking engines (44%) continue to head their respective lists.
- Simultaneously, **service providers' websites are increasingly popular** when planning and booking for 12% and 29% of Europeans, respectively.
- Destinations' websites and social media pages are also preferred by 13% of respondents when planning trips.



WAVE 5
RESEARCH HIGHLIGHTS

- Asked which travel quality[1] is most important for trips this year, the highest percentage (24%) of **Europeans still put Health and safety first. Sustainability is selected by** 5% of respondents **and is for the first time among the top six**.
- As in all previous research waves, the rollout of the **COVID-19 vaccine remains the key factor for travel decision-making** among 11% of respondents, now sharing first place with "a destinations' effectiveness in managing COVID-19". A pre-travel COVID-19 test requirement comes a close third, with 10% of respondents selecting this option.
- **The possibility of being quarantined during a trip (16%) followed by rising COVID-19 cases (14%) and getting ill (13%) continue to be the prevalent travel concerns for early-bird travellers. Economic factors are currently of minor importance.**
- **The strict Health and Safety protocols in destinations are critical for having a safer and more relaxed holiday experience, according to 69% of Europeans with short-term travel plans**. On the contrary, 21% of respondents claim that the protocols may spoil the travel experience, while 10% say it makes no difference.

[1] The term "Travel Qualities" refers to the nature, traits and characteristics of the travel experience sought by consumers

WAVE 5
INSIGHTS ON TRAVELLERS' ONLINE SENTIMENT

The report is also complemented by insights on travellers' online sentiment for major European destinations for the period of December 2020 compared to December 2019.[1]

- A third of all travel **social media mentions** are made by the **35-44 age group** - the same age group that is also **most likely to travel** according to the results of wave 5.
- In December 2020, the **Tourism Product Index**[2] - measuring tourists' satisfaction with the offering of European destinations - fell by 14% compared to December 2019 to 56%. This figure is even closer to the 50% threshold below which visitor satisfaction is considered low. Deteriorated sentiment might result from the lockdowns and the decline in the destination tourism offering.
- The **Hotel Satisfaction Index**[2] during December 2020 was 66%, indicating a good level of satisfaction with accommodation in destinations. The December 2020 index was 3% above December 2019.

[1] Benchmark report for major European destinations;December 2020 compared to December 2019 (Mabrian Technologies, January 2021)
[2] Tourist Product/ Hotel Satisfaction Indexes, measure satisfaction levels of visitors to a destination with its offering (arts & culture, food & cuisine, sunbathing, etc) & accommodation **respectively.**
For more info on methodology and scoring system please refer to slide 48

WAVE 5
RECOMMENDATIONS FOR DESTINATIONS



- Given the importance of a COVID-19 vaccine for travel decision-making, destinations should monitor vaccine rollout in **source market countries** and target those prioritised groups who have already received it **(i.e. mature travellers)**.
- Increasing confidence in air travel should prompt destination authorities **to extend their marketing efforts to medium-haul markets** and **to source countries more dependent on flights,** while **developing synergies with airlines and hotels for co-branded marketing campaigns** (destination partnerships).
- As Europeans are concerned about their personal health throughout their in-destination experience, NTBs and DMOs should deploy reassurance campaigns covering equally transport, attractions, restaurant and cafes as well as accommodation.
- With the 35-44 age group more likely to travel, destinations **should highlight family-friendly elements,** such as parks and open spaces where families can spend time in a COVID-19-safe manner. NTBs and DMOs[1] could also promote on their destination websites tourism routes that are worth exploring by car.

[1] NTBs: National Tourism Boards – DMOs: Destination Marketing Organizations

WAVE 5
RECOMMENDATIONS FOR BUSINESSES



- With senior citizens across Europe a high priority for vaccination and the 55+ age group more positive about travel, businesses and travel agents should target **this age group and promote appropriate products** (such as culture and heritage), with a strong emphasis on **health and safety**.
- With over a third of respondents planning to travel in May-July 2021, businesses **should start with the preparation and promotion of sun & beach and city break experiences**. However, as many Europeans remain uncertain about the feasibility of their travel plans, **flexible booking terms** and **convenient cancellation policies** are a must-have.
- Service providers may extend **flexibility beyond cancellation policies, in payment terms**; through installments, subscription models, tokens for Food and Beverage outlets or extra discounts for digital Word of Mouth reference.
- In view of fears for virus transmission in restaurants and cafes, owners should gain travellers' confidence with strict implementation of **health and safety protocols** and flag any measures in their promotion campaigns.

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How to read

Wave 5

1. Dates on the graphs refer to the following data collection periods for each research wave:

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
Surveys dates	27 Aug – 15 Sep '20	21 Sep – 9 Oct '20	19 Oct – 6 Nov '20	20 Nov – 3 Dec '20	18 Dec '20 – 7 Jan '21

2. To present Wave 5 timings in which respondents are most likely to take their next trip, the following time periods should be used as a reference:
   - This month; December 2020 – January 2021.
   - In 1-2 months; January – March 2021.
   - In 3-4 months; March – May 2021.
   - In 5-6 months; May - July 2021.
3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents; 5,855
   - Respondents with short-term travel plans/ most likely to travel in the next 6 months ("early-bird travellers"); 3,182 (in specific questions the sample size was reduced to 3,181/ 3,180 due to missing values)
   - Respondents selecting outbound European destinations; 4,215
4. Only significant changes between current and previous waves are shown; Significant changes refer to >2.5% for the total sample and >5% for the smaller samples, in absolute numbers. To indicate these changes, the following symbols were used:
   - Increasing ▲ , decreasing ▼
   - Numbers next to the arrows reflect the percentage of change in the share of respondents selecting a specific response between current and previous waves
6. When mention of new COVID-19 cases is made, it refers to the data collection period.
7. All data and insights refer to domestic and intra-European travel, unless otherwise stated.

TRAVEL INTENTIONS



01

Travel intentions improve gradually: 54% of surveyed Europeans eager to take a trip by the end of July 2021

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



Poland
80.2% ▲ 8%



Belgium
55.3% ▲ 16%



Italy
60.7% ▲ 13%

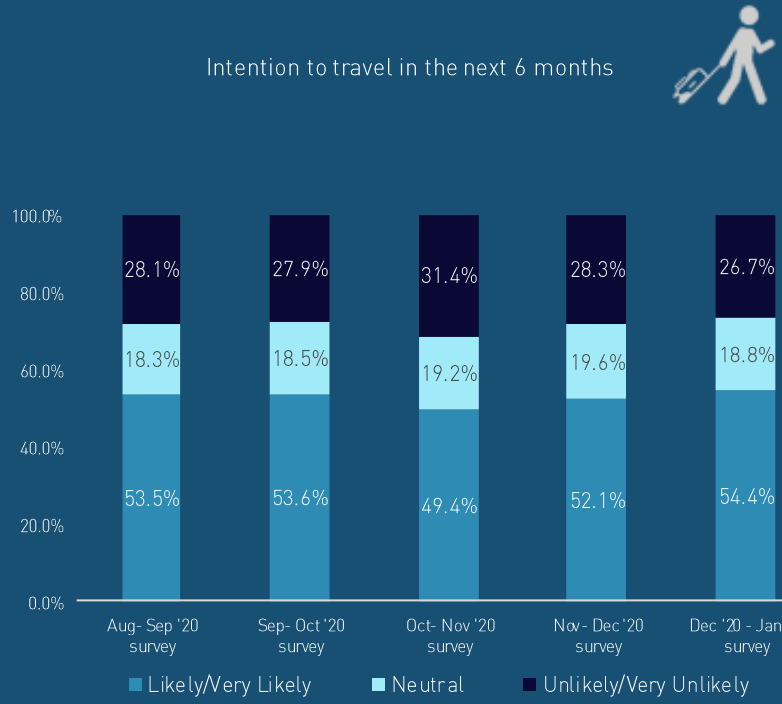


Spain
51.8%



Austria
55.4% ▲ 7%

Intention to travel in the next 6 months



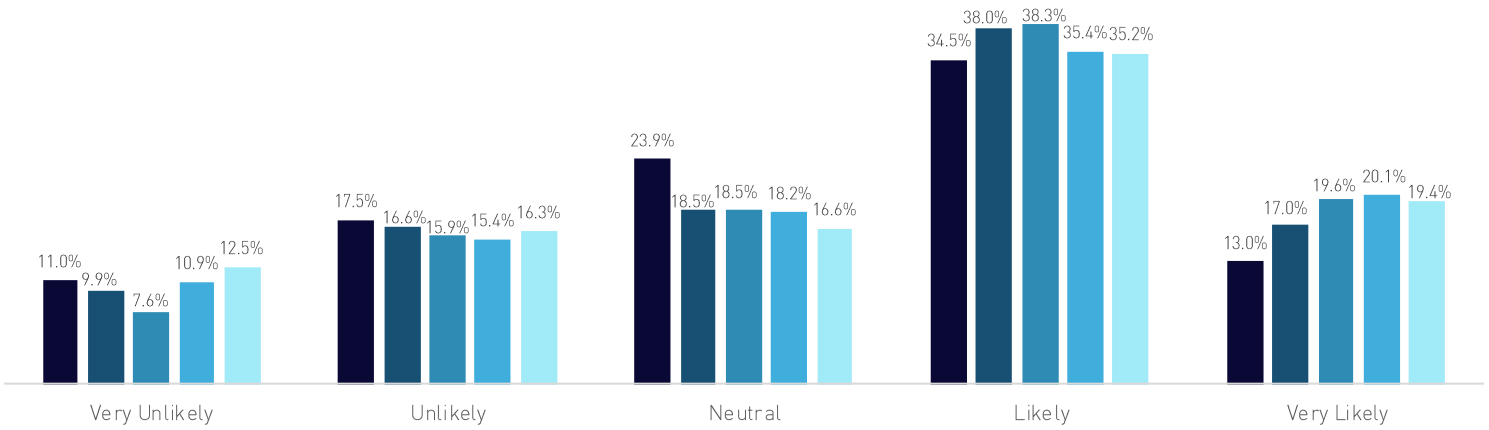
No. of respondents: 5,855

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

While respondents between 35 and 44 are currently the keenest to travel, older age groups show increasing interest due to vaccine rollout

50% of respondents aged 55 and above are **likely/very likely to resume travel as a result of COVID-19 vaccine** vs. 34% among the 18-24 age group

Intention to travel in the next 6 months by age group



Dec '20 –Jan '21 survey

18-24

25-34

35-44

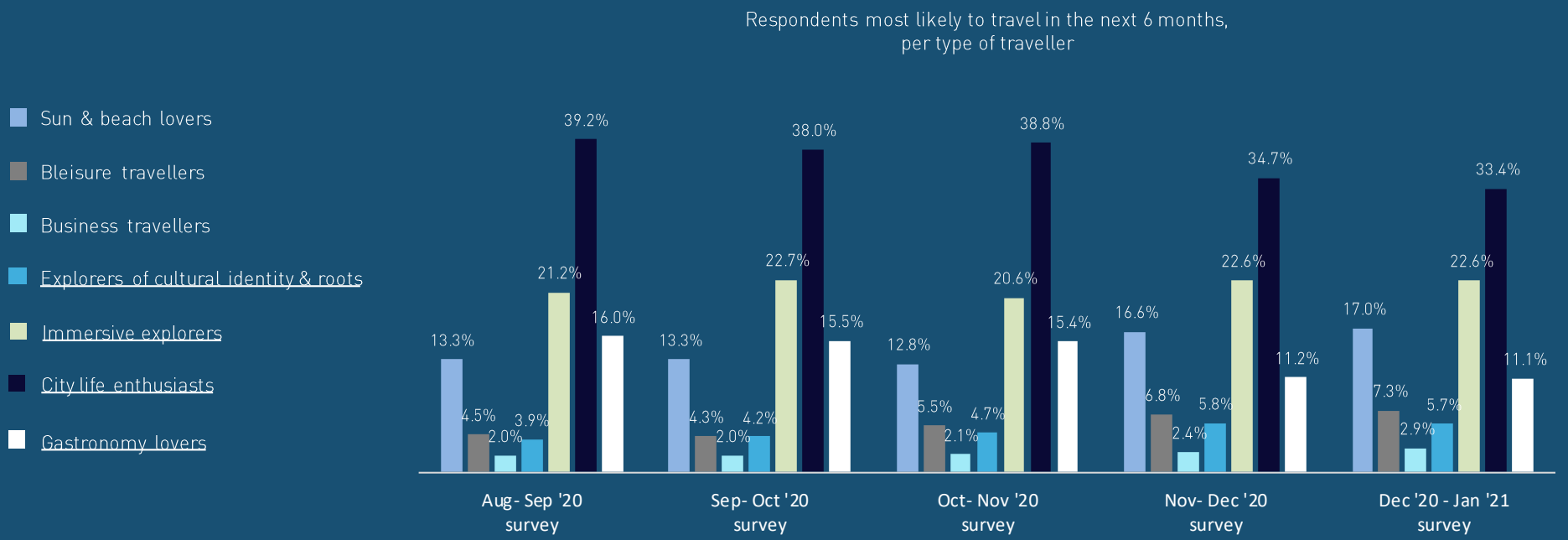
45-54

≥55

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

No. of respondents: 5,855

With the warmer months approaching, the share of respondents mostly interested in sun and beach experiences slightly increases, while there is somewhat decreased interest in city breaks

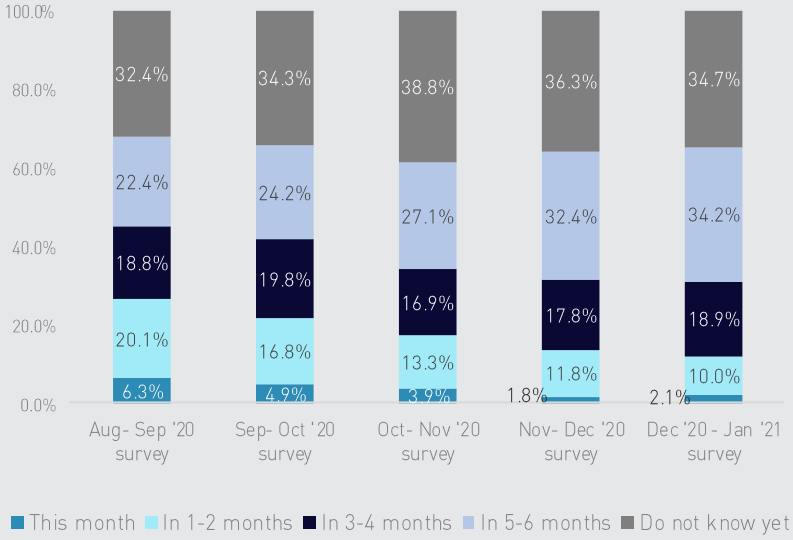


Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 3,181

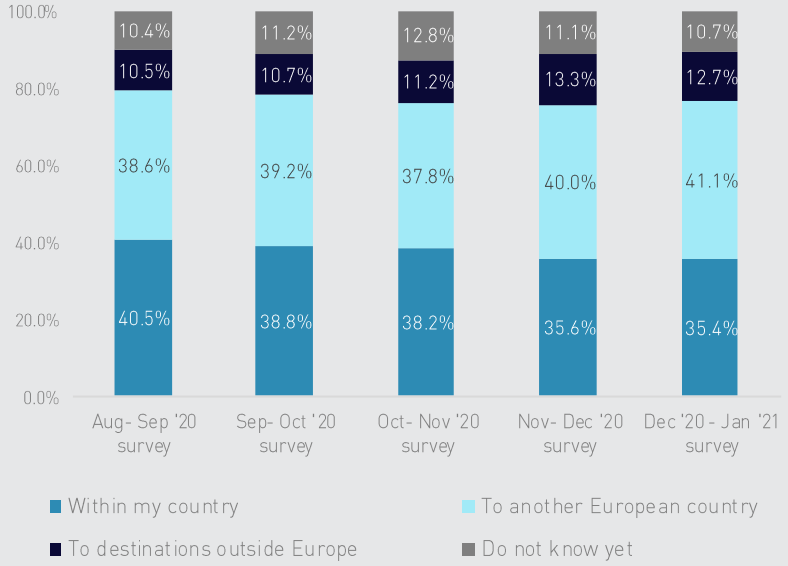
Europeans increasingly aim to travel abroad with the majority considering a trip no earlier than March 2021

When will Europeans travel next?



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

Where will Europeans travel within the next 6 months?



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

No. of respondents: 5,855

Dec '20 – Jan '21 survey

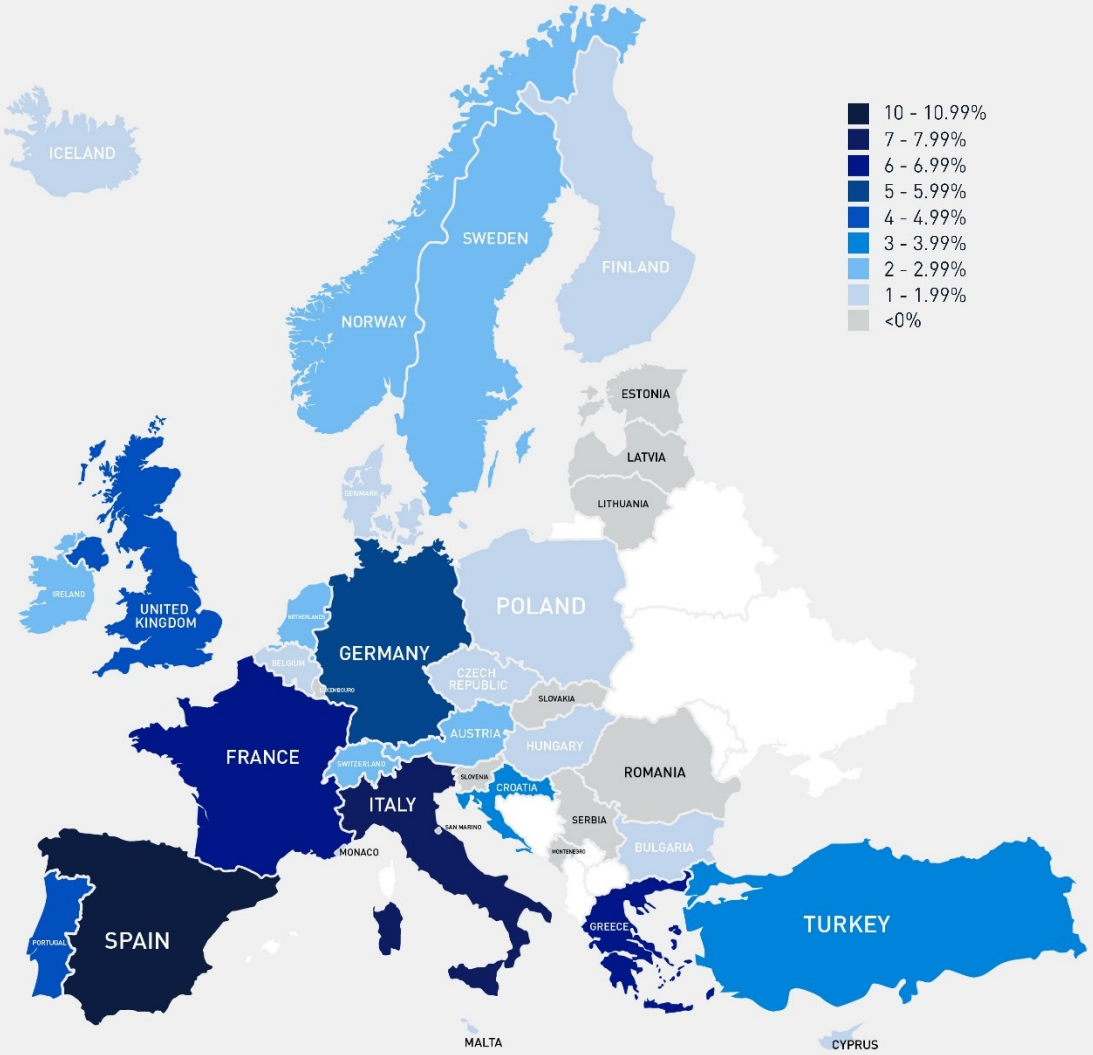
PREFERRED COUNTRIES FOR THE NEXT EUROPEAN TRIP

Europe's top 5 destinations maintain their spots, despite the pandemic and the change in seasons

TOP 10 COUNTRIES

Spain	10.2%
Italy	7.8%
France	6.5%
Greece	6.1%
Germany	5.2%
Portugal	4.5%
United Kingdom	4.3%
Turkey	3.6%
Croatia	3.1%
Netherlands	2.9%

Please use this map as a reference only



* No significant changes between waves were recorded for this question

No. of respondents: 4,215

 Q11. To which country(ies) do you plan to travel next?

Leisure remains the primary purpose of trips while business travel, although below its pre-pandemic benchmark*, appears resilient

Top 3 markets to resume leisure travel

Italy
75.8%
▲ 10%

France
69.4%

Belgium
65.9%

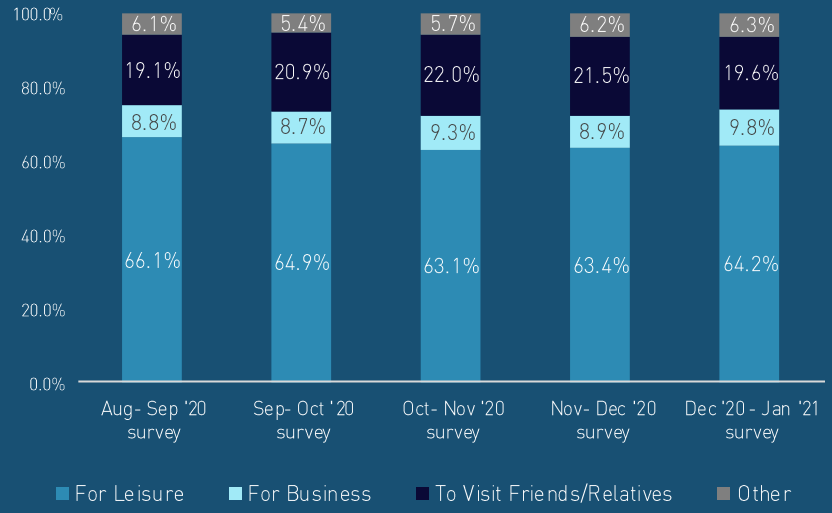
Top 3 markets to resume business travel

Germany
15.7%

Switzerland
12.7%

Netherlands
12.0%

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



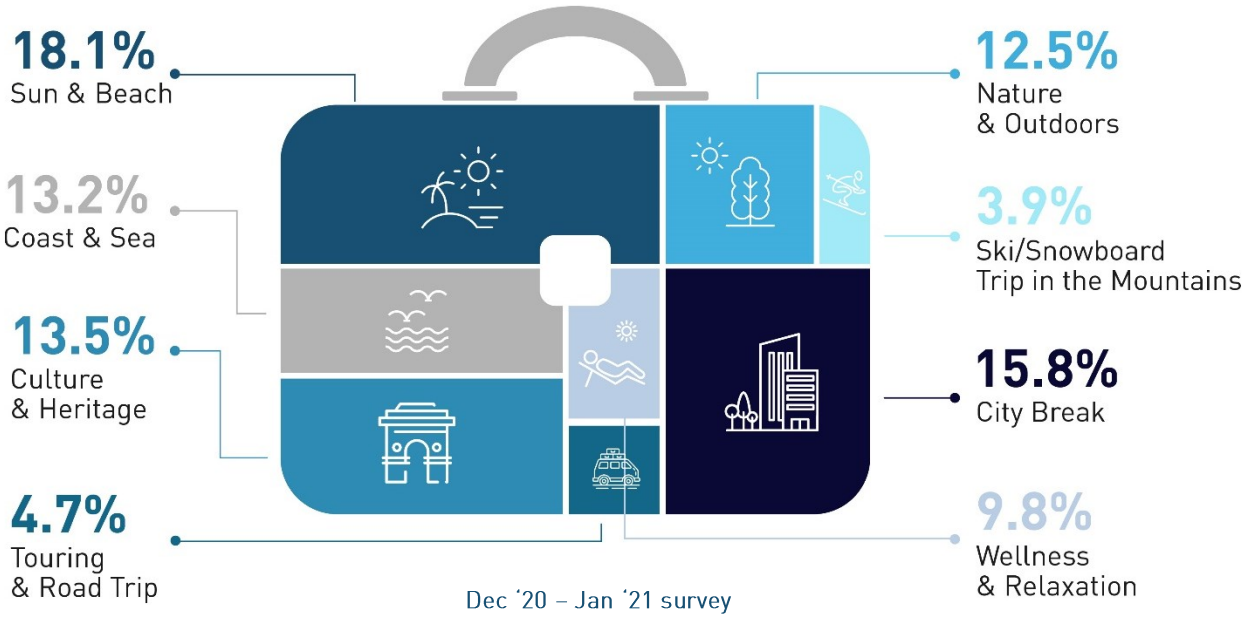
No. of respondents: 3,182

* 13% (UNWTO, 2019)

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

Sun and beach experiences gain interest with many Europeans planning to resume travel in early summer

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



Dec '20 – Jan '21 survey

Culture and Heritage trips as well as wellness and relaxation show the lowest seasonality among all types of leisure trips

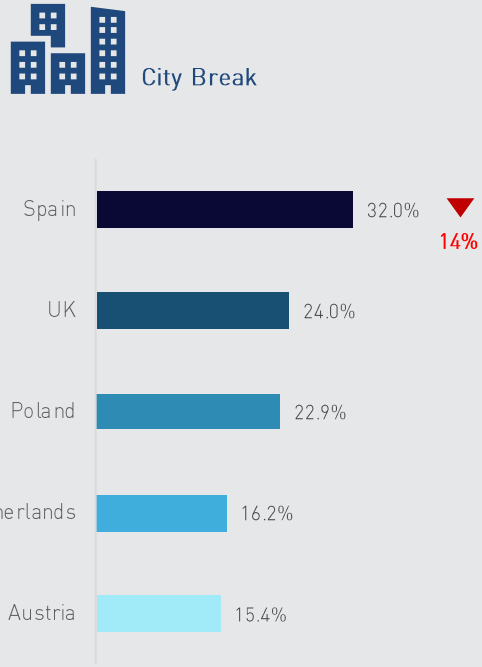
* No significant changes between waves were recorded for this question

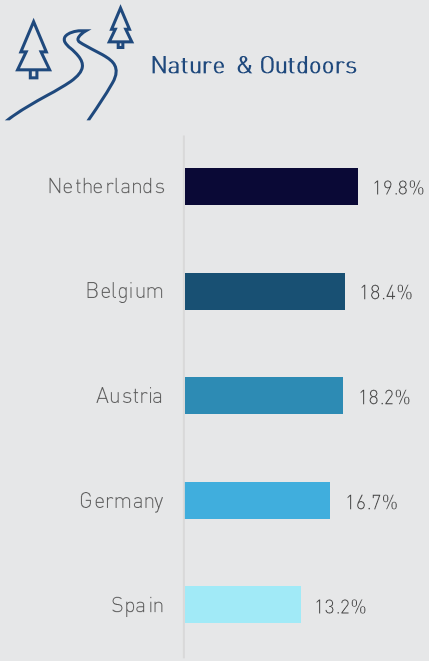
Q17. What type of leisure trip within Europe are you most likely to undertake next?

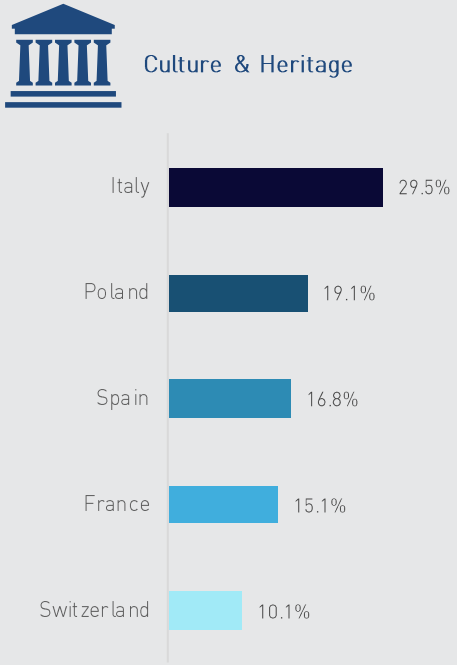
No. of respondents: 3,180

As source countries maintain consistent preferences for specific tourism products, DMOs can draft long-term strategies aimed at penetrating specific markets

Dec '20 – Jan '21 survey







How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 32.0% of respondents from Spain are most likely to undertake a city break trip

No. of respondents: 5,855

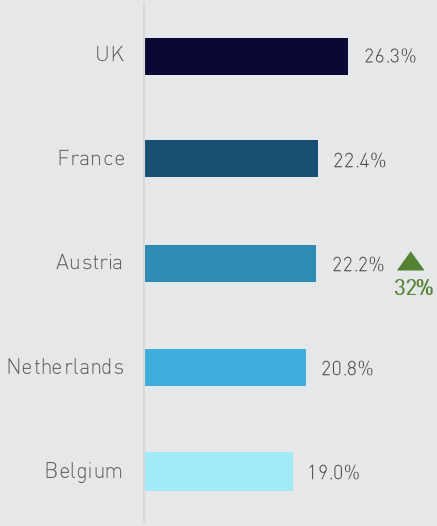
Q17. What type of leisure trip within Europe are you most likely to undertake next?

Britons, French and travellers from the DACH region now show increased interest in holidays by the sea

Dec '20 – Jan '21 survey

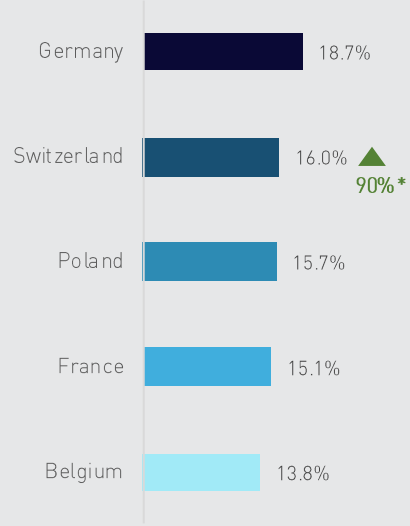


Sun & Beach



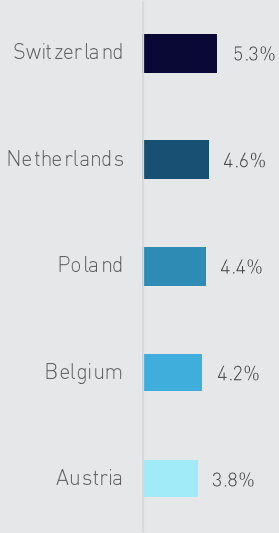


Coast & Sea



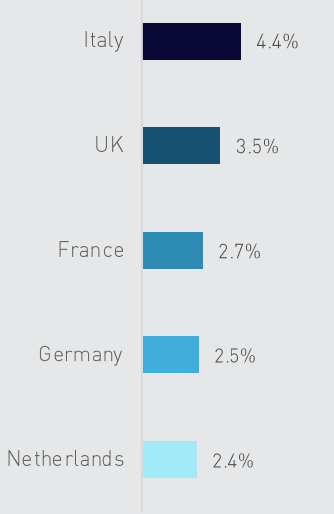


Ski/Snowboard trip in the mountains





Cruising



* Please use for reference only due to the low number of respondents (n: 57)

How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 26.3% of respondents from UK are most likely to undertake a sun and beach trip

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

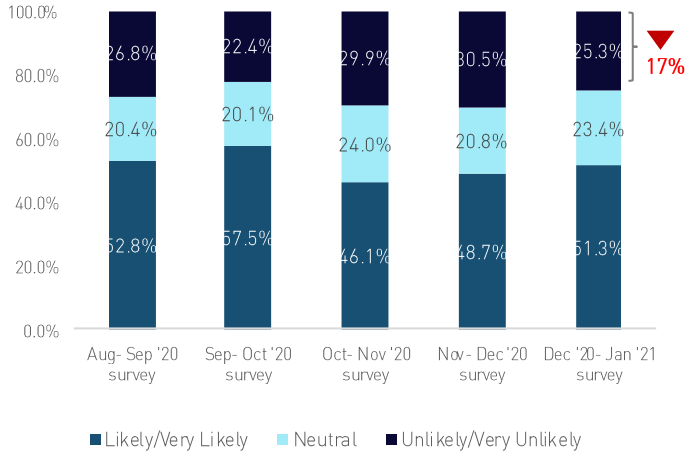
No. of respondents: 5,855

GERMANY

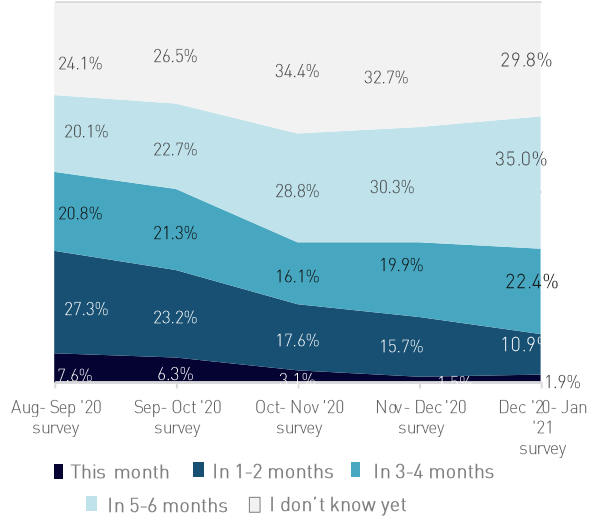
More than half of the surveyed Germans intend to travel in the next 6 months, with the May – July 2021 period being the top choice



Willingness to travel in the next 6 months

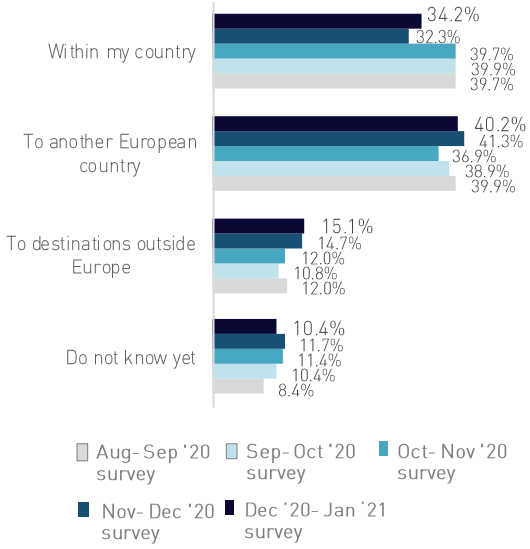


When will Germans travel?



For specific dates please refer to slide 10

Where will Germans 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?

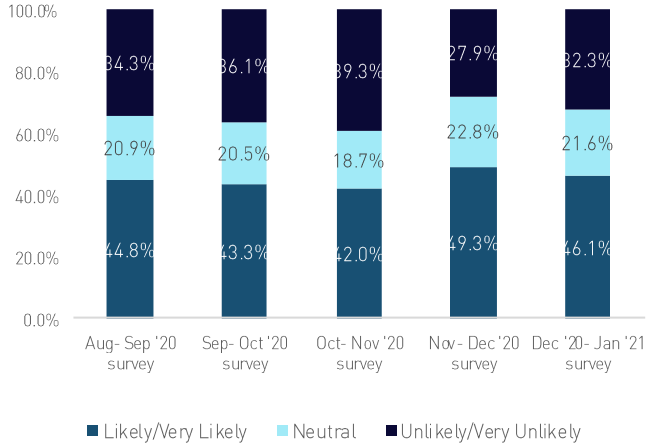
No. of respondents: 750

UNITED KINGDOM

Britons are largely uncertain about the time of their next trip, but still view spring – summer 2021 quite positively

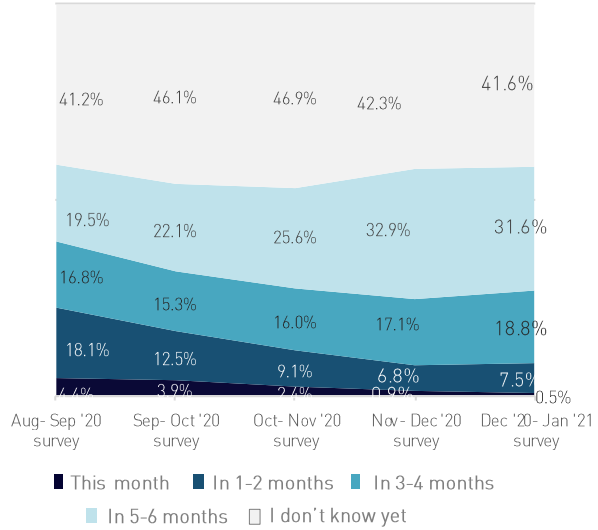


Willingness to travel in the next 6 months



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

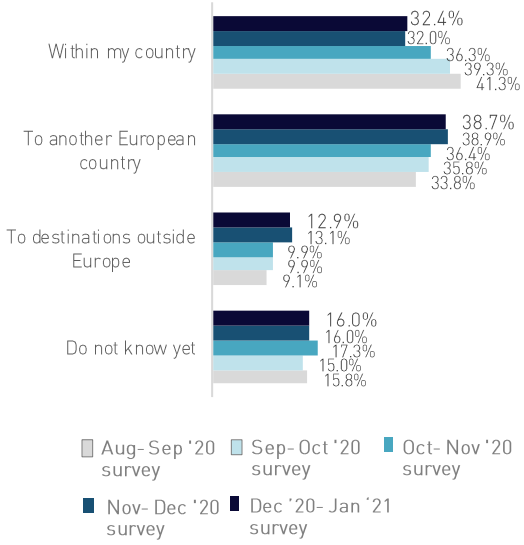
When will Britons travel?



For specific dates please refer to slide 10

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

Where will Britons travel within the next 6 months?



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

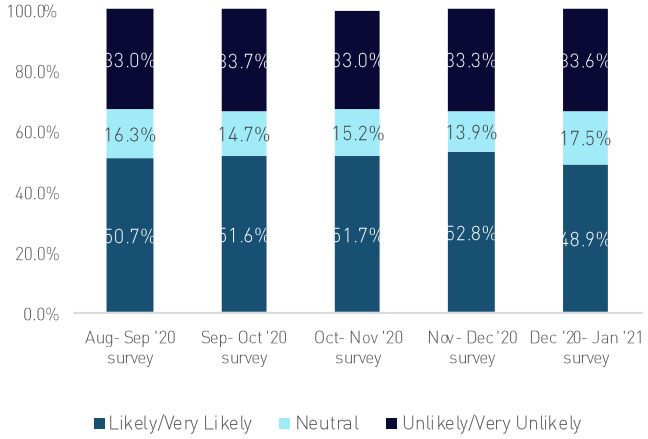
No. of respondents: 750

FRANCE

The French are increasingly confident about when they will travel next, showing a growing intention (40%) for trips between March-May

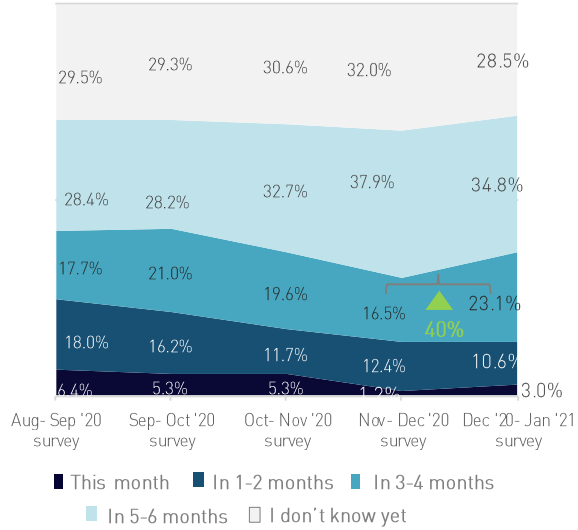


Willingness to travel in the next 6 months



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

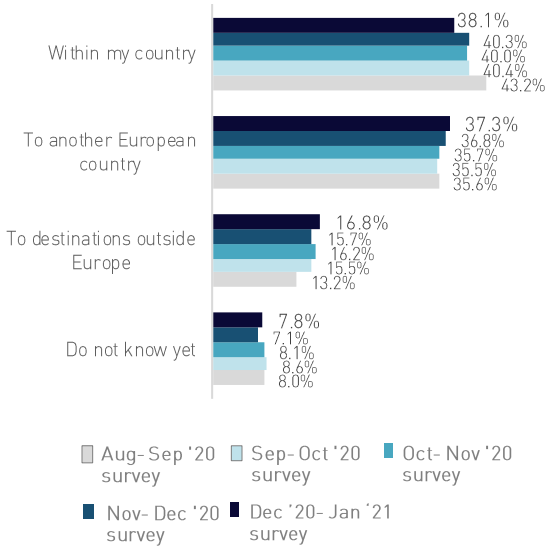
When will French travel?



For specific dates please refer to slide 10

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

Where will French travel within the next 6 months?



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

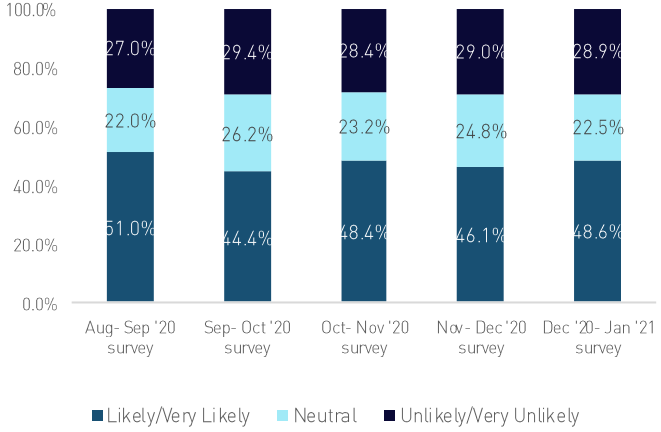
No. of respondents: 746

NETHERLANDS

Dutch respondents still aim for mainly intra-European travel, but uncertainty about the timing of their next trip increases

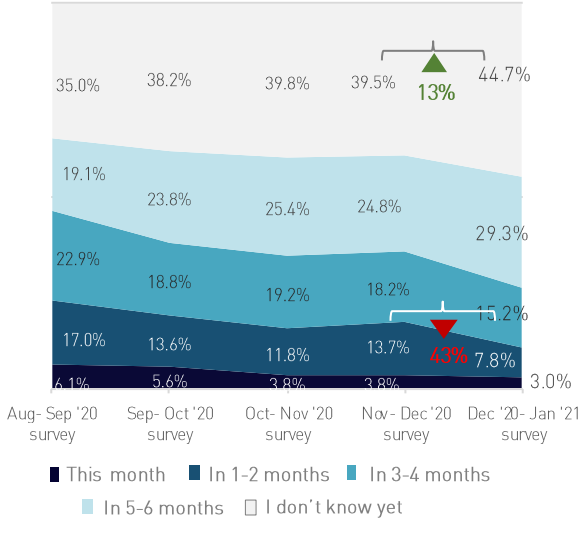


Willingness to travel in the next 6 months



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

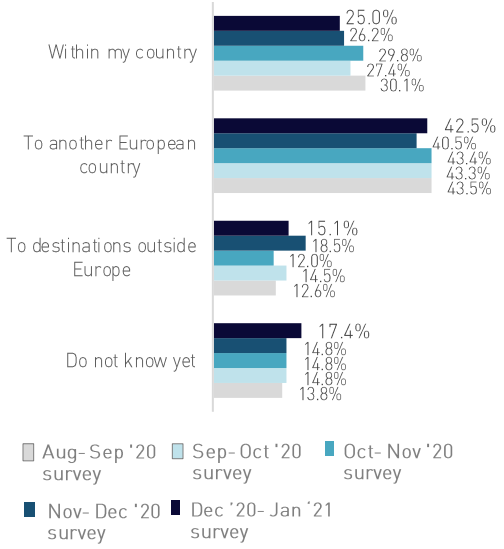
When will Dutch travel?



For specific dates please refer to slide 10

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

Where will Dutch travel within the next 6 months?



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

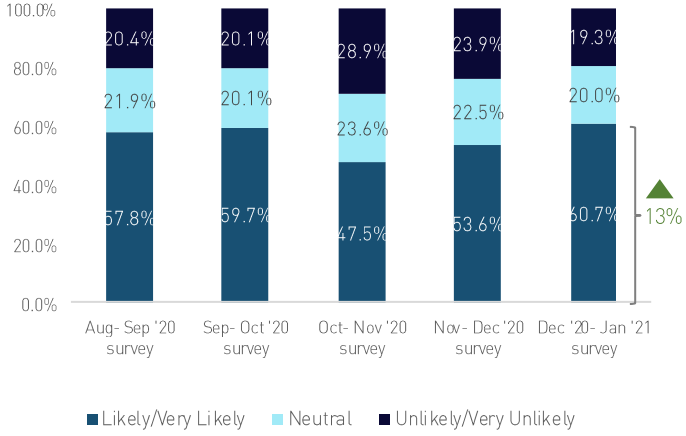
No. of respondents: 500

ITALY

While positive travel sentiment gathers momentum, 50% of Italians are still reluctant to venture abroad

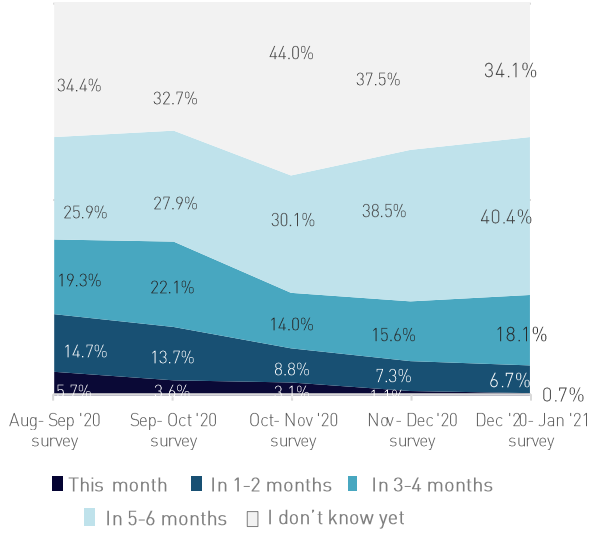


Willingness to travel in the next 6 months



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

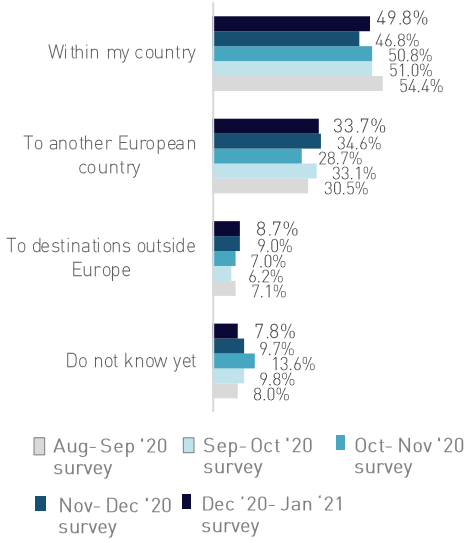
When will Italians travel?



For specific dates please refer to slide 10

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

Where will Italians travel within the next 6 months?



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

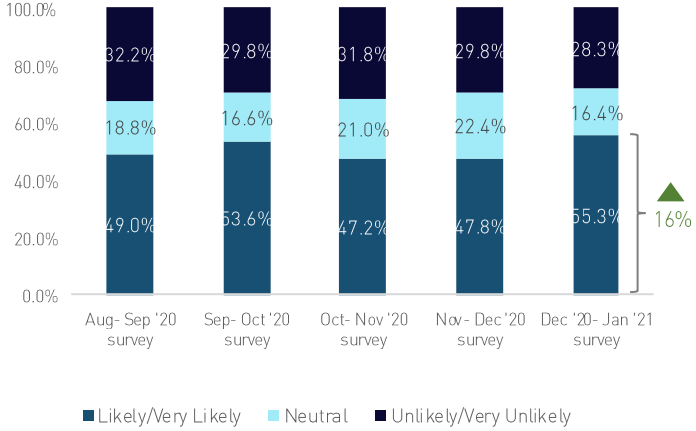
No. of respondents: 750

BELGIUM

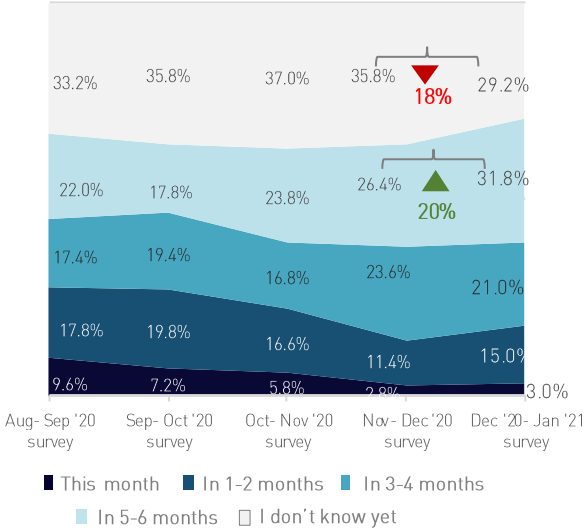
Optimism is on the rise for Belgian travellers, with trips abroad planned for late spring into summer 2021



Willingness to travel in the next 6 months

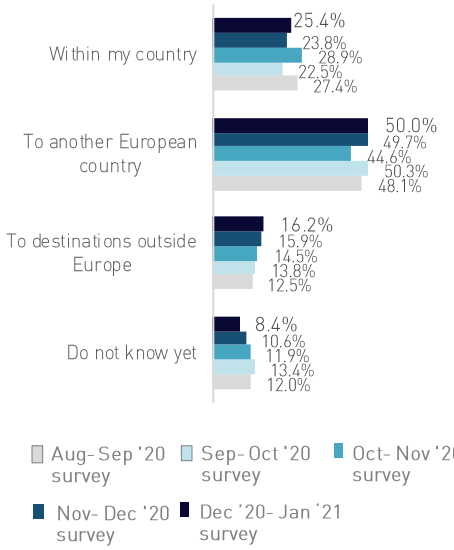


When will Belgians travel?



For specific dates please refer to slide 10

Where will Belgians 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?

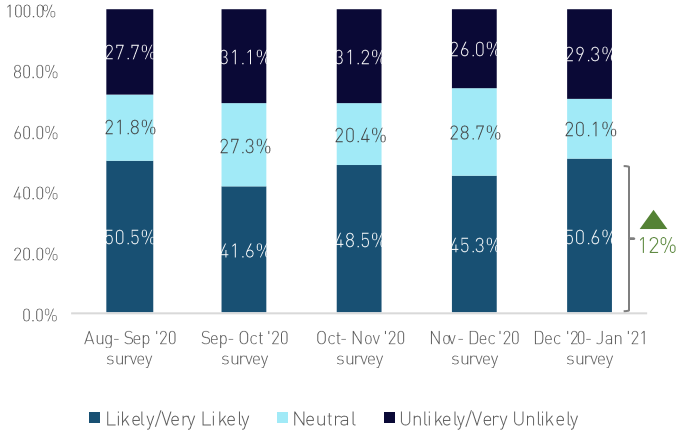
No. of respondents: 500

SWITZERLAND

While 1 in 2 Swiss respondents are now keen to travel within 6 months, uncertainty over exact dates surges by 37%

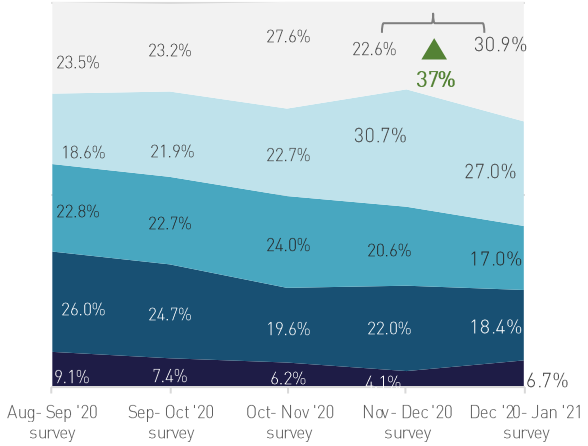


Willingness to travel in the next 6 months



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

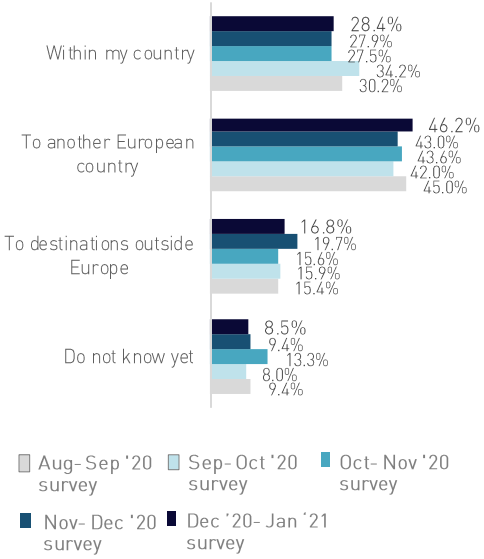
When will Swiss travel?



For specific dates please refer to slide 10

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

Where will Swiss travel within the next 6 months?



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

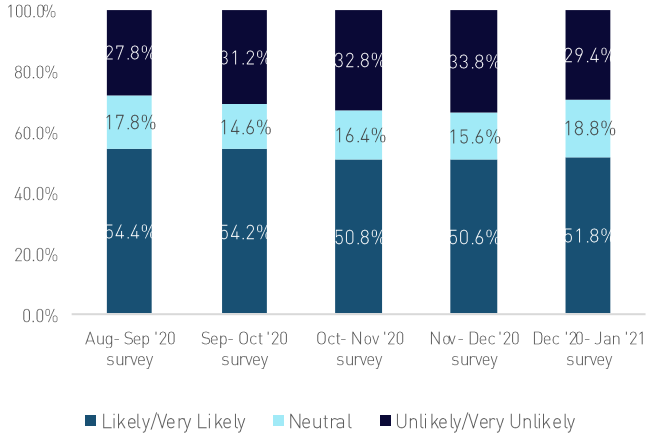
No. of respondents: 359

SPAIN

Spaniards still show the greatest travel timing uncertainty out of all surveyed European markets

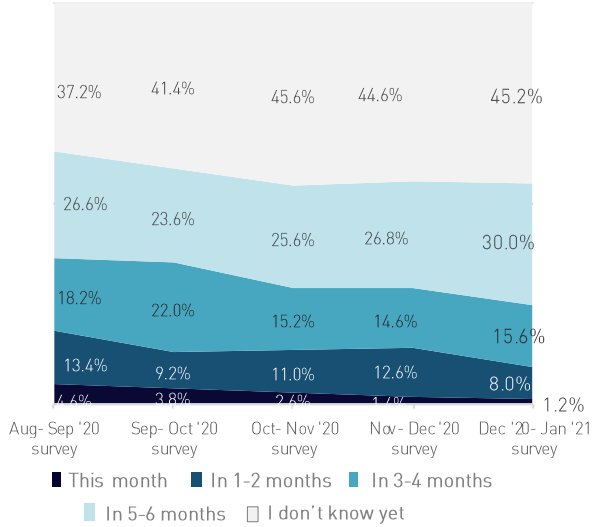


Willingness to travel in the next 6 months



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

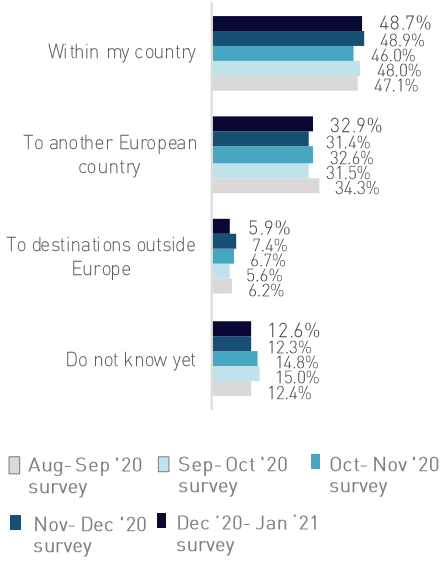
When will Spaniards travel?



For specific dates please refer to slide 10

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

Where will Spaniards travel within the next 6 months?



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

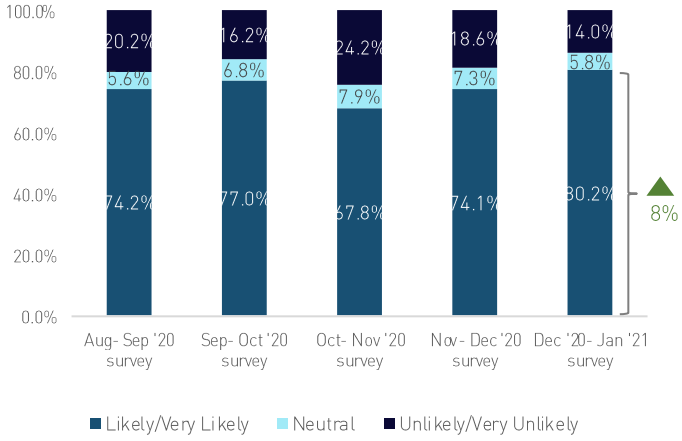
No. of respondents: 500

POLAND

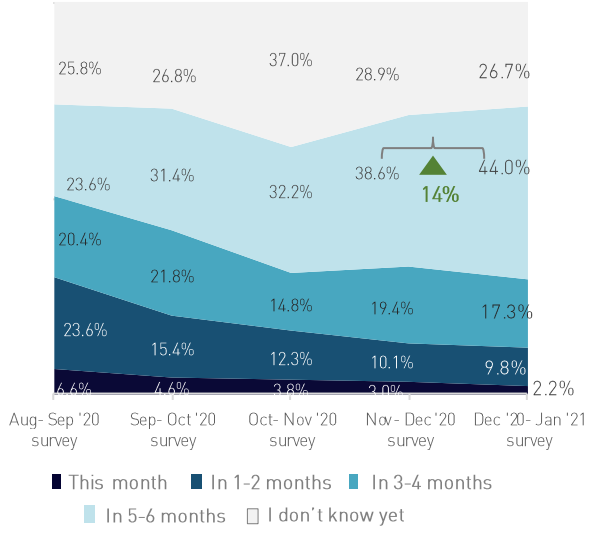
With a share of 80%, Poles are still the most enthusiastic of all surveyed markets when it comes to travel up to July 2021



Willingness to travel in the next 6 months

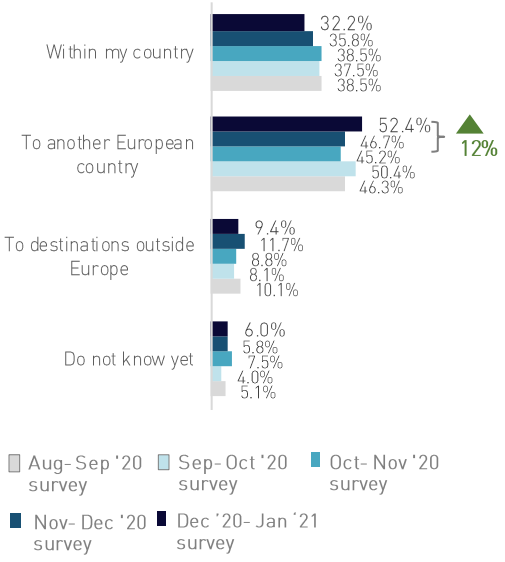


When will Poles travel?



For specific dates please refer to slide 10

Where will Poles 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?

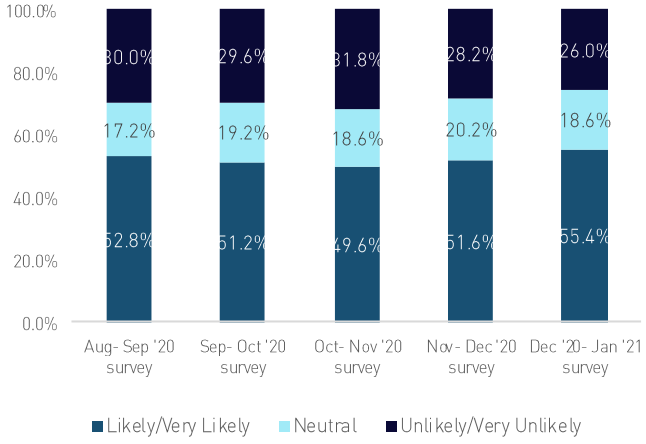
No. of respondents: 500

AUSTRIA

Over half of surveyed Austrians are eager to travel in the next 6 months, with intra-European travel favoured by 46%

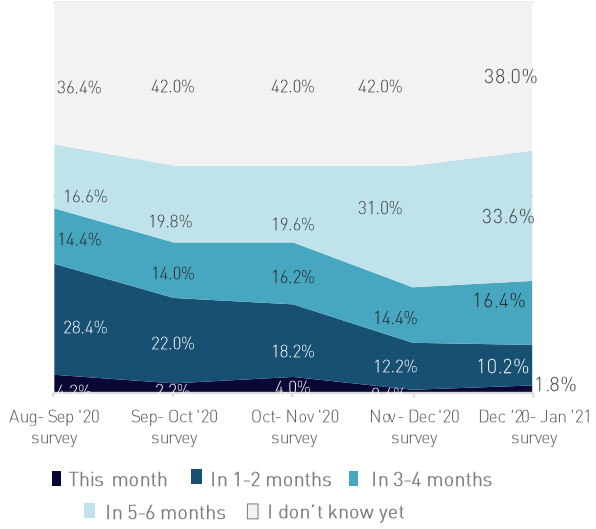


Willingness to travel in the next 6 months



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

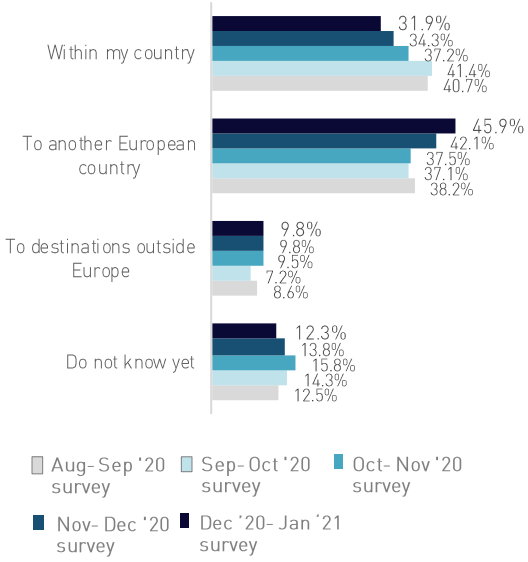
When will Austrians travel?



For specific dates please refer to slide 10

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

Where will Austrians travel within the next 6 months?



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

No. of respondents: 500

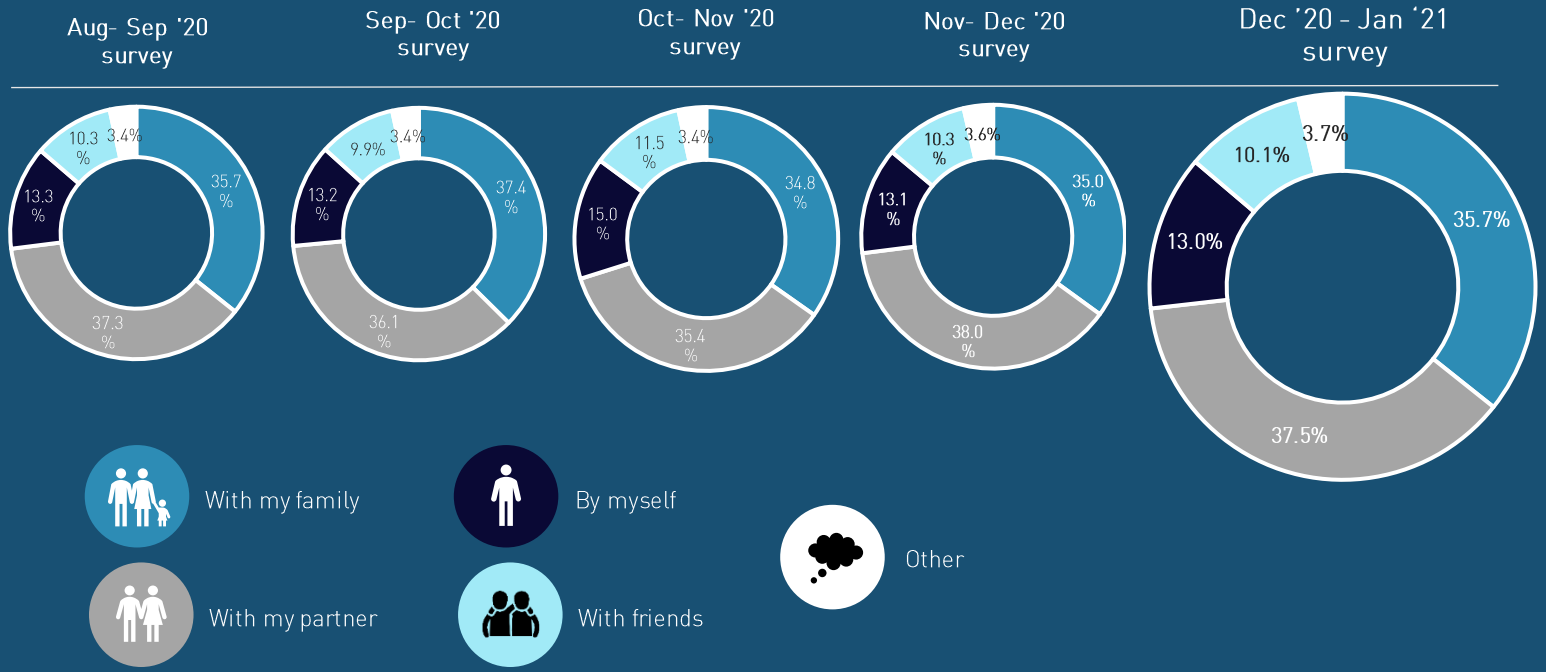


TRIP PLANNING

02

The share of Europeans keen to travel with their partner or family remains unchanged

Preferred travel companion for respondents most likely to travel in the next 6 months



Compared to people wishing to travel with a partner, solo travellers are more likely to take a business (9% vs. 2%) or bleisure trip (14% vs 4%)

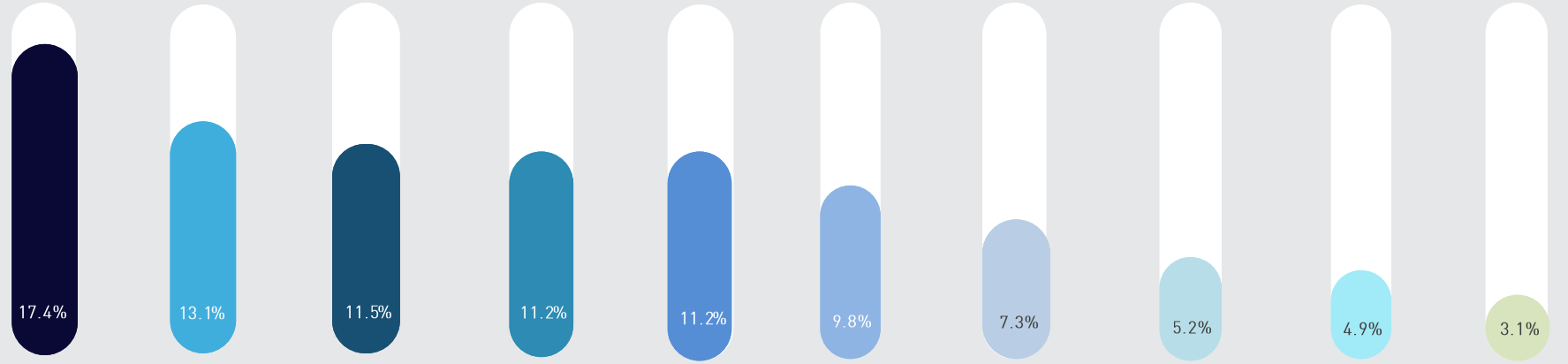
* No significant changes between waves were recorded for this question

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

No. of respondents: 3,182

Digital touchpoints are increasingly popular – hotels' websites and social media pages now climb to 3rd place among the preferred information sources for travel planning

Top 10 preferred sources of information for respondents most likely to travel in the next 6 months



Dec '20 - Jan '21 survey

* No significant changes between waves were recorded for this question

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

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

No. of respondents: 3,182

Digital channels dominate when it comes to bookings, though travel agents/ designers are more popular among mature Europeans

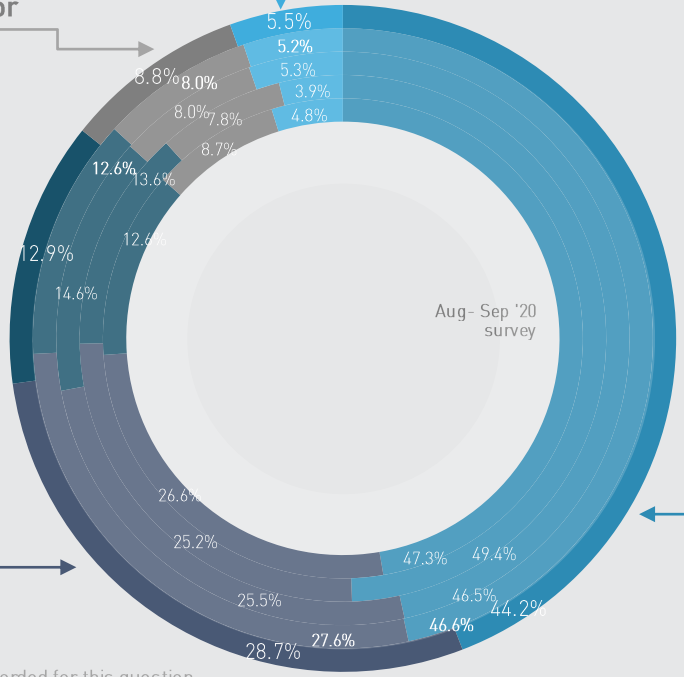
8.8%
Package holiday through a Tour Operator

5.5%
Corporate travel office

31% of those relying on travel agents are over the age of 55, while the percentage of younger people (18-24 or 25-34) that would select this service is just 15%

12.9%
Travel agent/ travel designer

City-life enthusiasts are more likely to book through Online Booking Engines than Sun and Beach lovers (48% vs 40%)



44.2%
Online booking engine

28.7%
Direct booking via accommodation/ airline website

* No significant changes between waves were recorded for this question

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

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

No. of respondents: 3,182

Consumers' preference for air travel is slowly taking off, providing a positive signal for the recovery of international tourism

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



Spain
69.9%



France
61.4%



UK
68.2% ▲ 8%

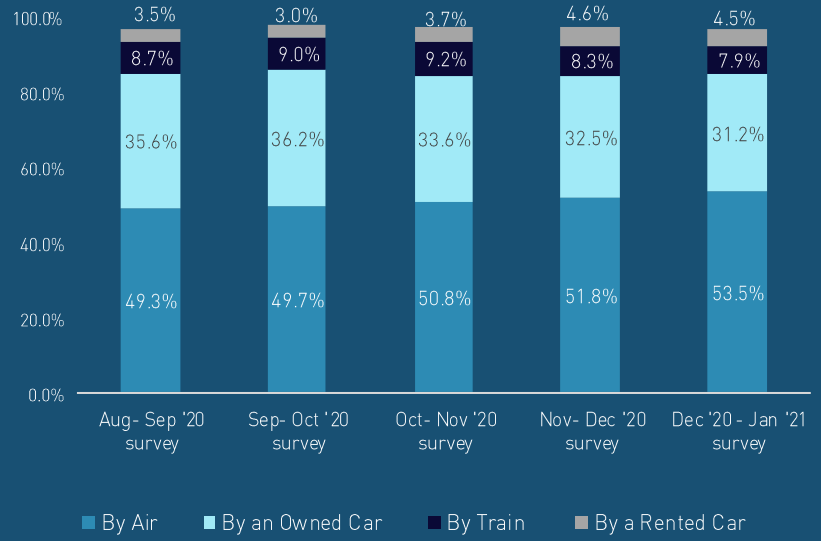


Poland
52.3%



Italy
65.9%

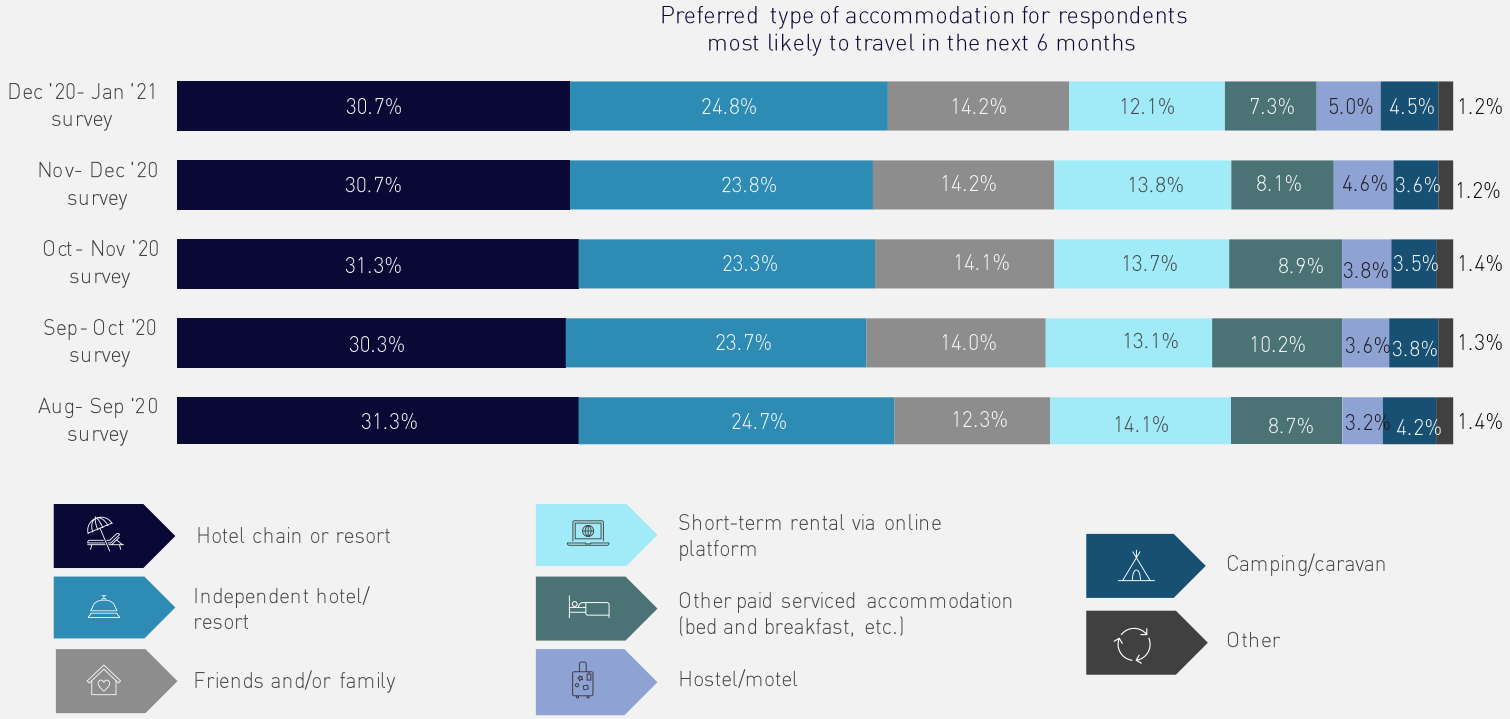
Top 4 modes of transport for respondents most likely to travel in the next 6 months



No. of respondents: 3,182

Q14.Which of the following modes of transport would you most consider using during your next trip within Europe?

Over half of respondents still indicate a hotel or resort to be their preferred accommodation choice



The preference for hotels/ resorts increases with age: 28% of the 18-24 age group stay in hotels vs. 51% in the 55+ age group

For the younger audience (18-24) the short-term rentals are in 3rd place

* No significant changes between waves were recorded for this question

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

No. of respondents: 3,181

The importance of health and safety considerations further increases, while sustainability appears for the first time as a popular travel quality

Dec '20 – Jan '21 survey



The term "Travel Qualities" refers to the nature, traits and characteristics of the travel experience sought by consumers

* No significant changes between waves were recorded for this question

Q20. Which of the following qualities regarding travel are more important to you now compared to last year?

No. of respondents: 5,855

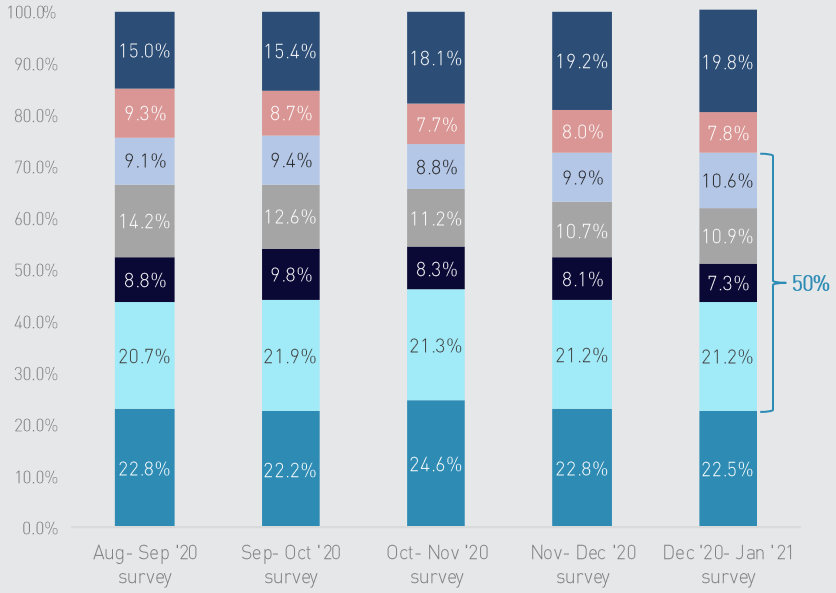
TRAVEL CONCERNS



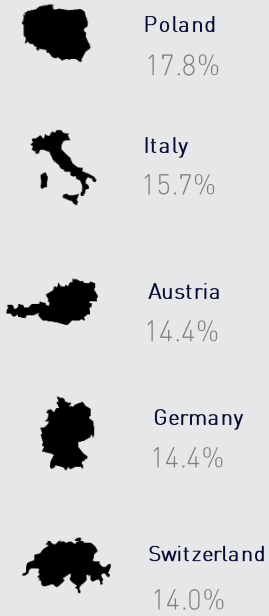
03

The percentage of Europeans committed to travel with some changes to their initial trip, and despite the pandemic, holds firm at 50%

How has COVID-19 affected travel plans



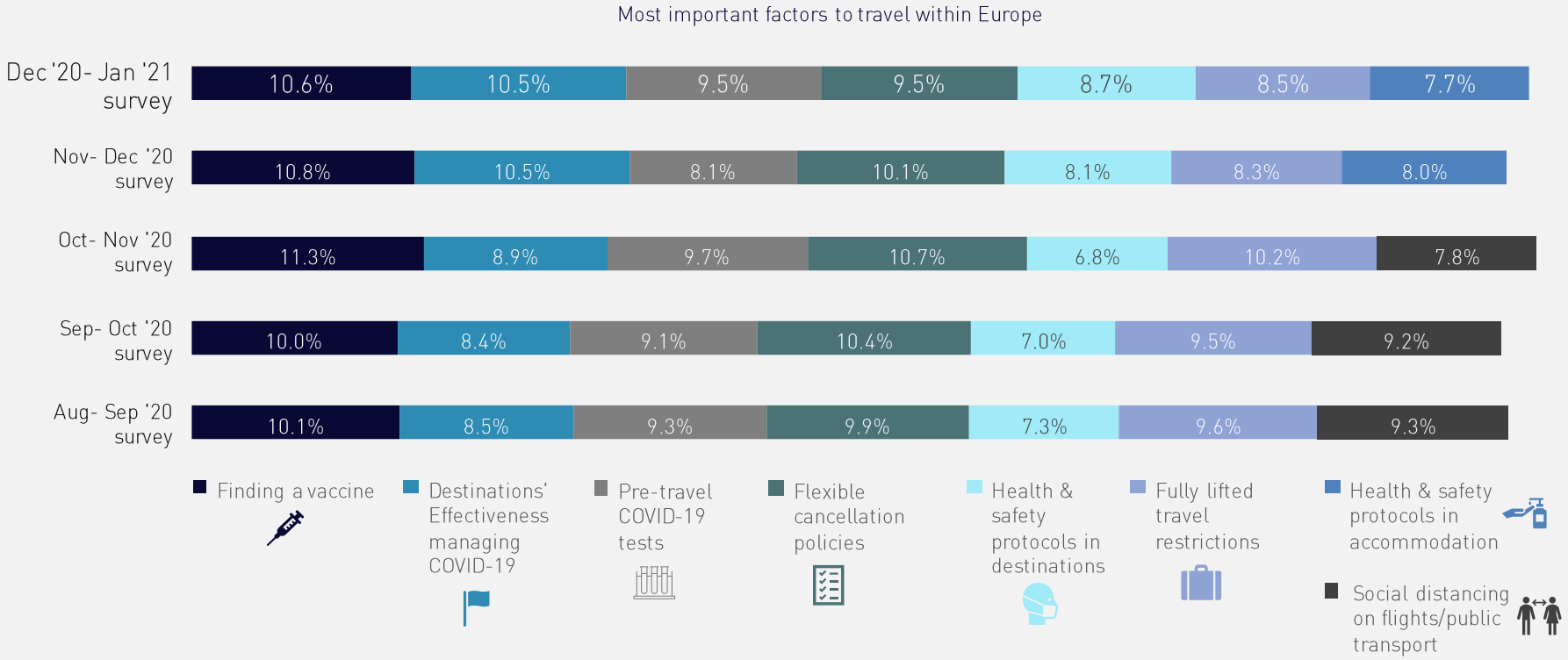
Top 5 markets which chose a domestic trip over international because of COVID-19



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

No. of respondents: 5,855

COVID-19 vaccines remain the top driver for resuming travel, bringing hope that a mass rollout will contribute towards tourism recovery



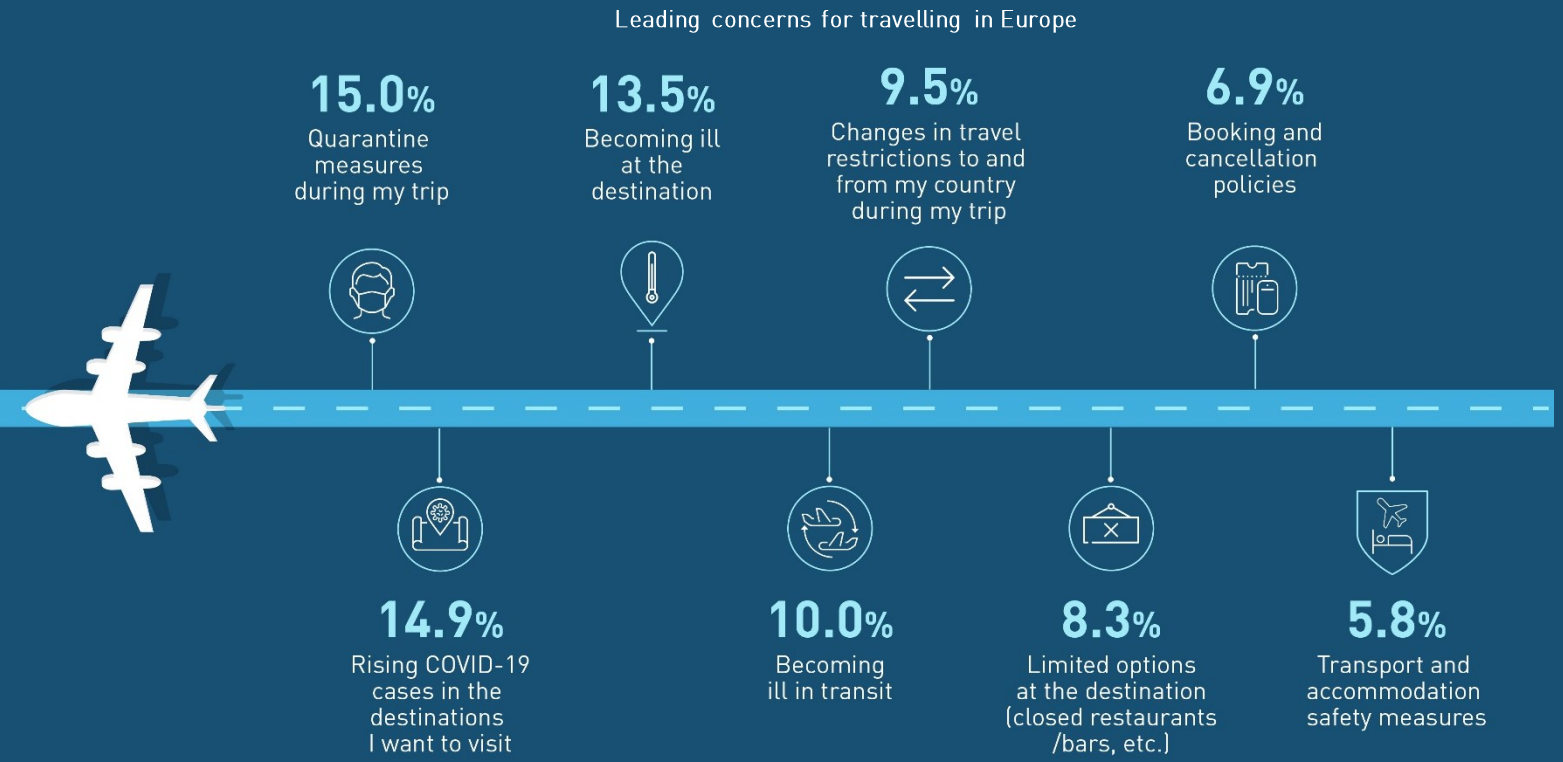
* No significant changes between waves were recorded for this question.

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

No. of respondents: 5,855

SIZING UP TRAVEL ANXIETIES

Europeans are now equally worried about COVID-19 case spikes at the destination and quarantine measure coming into effect during a trip



* No significant changes between waves were recorded for this question.

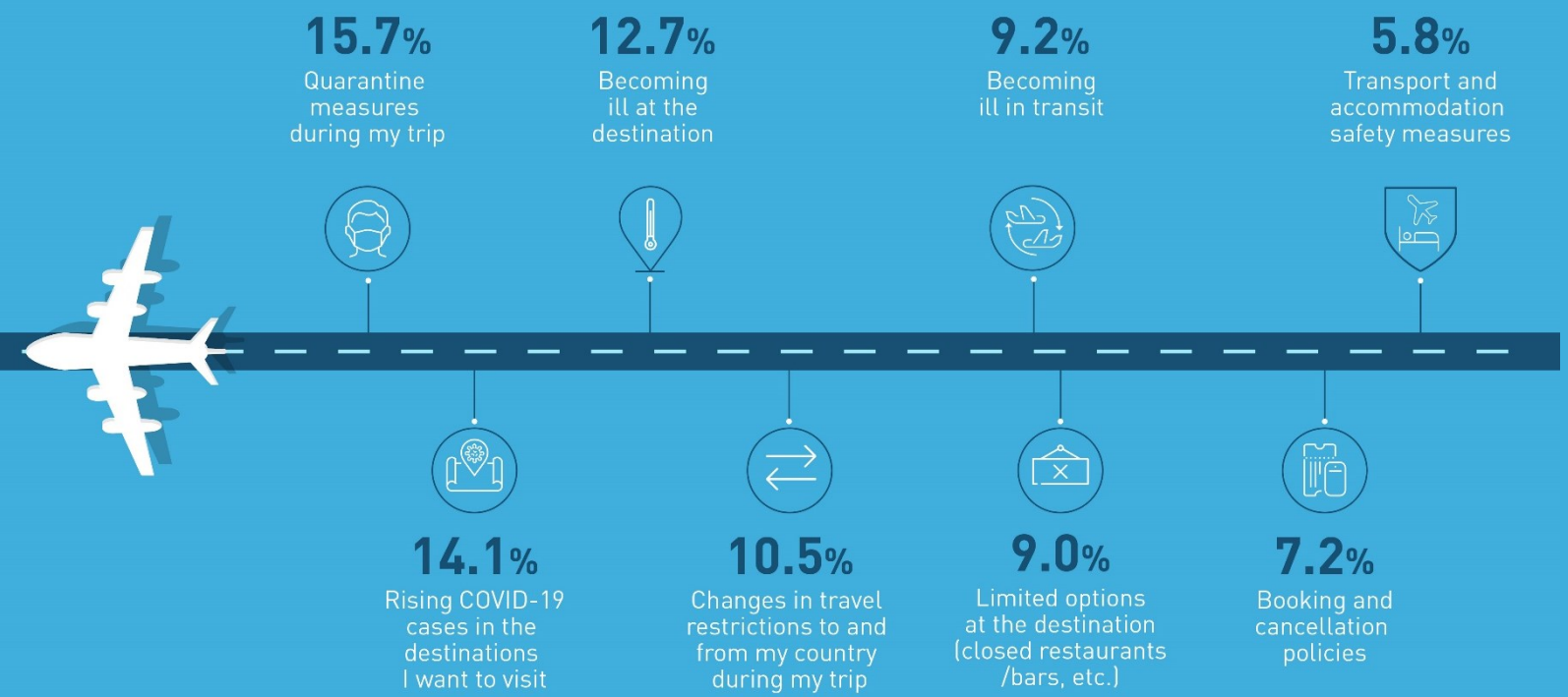
Q4.What currently concerns you the most about travelling within Europe?

No. of respondents: 5,855

TRAVEL CONCERNS OF "EARLY-BIRD" TRAVELLERS

Respondents most likely to travel in the next 6 months are still anxious about facing quarantines during their trip

Leading concerns for those who are most likely to travel next



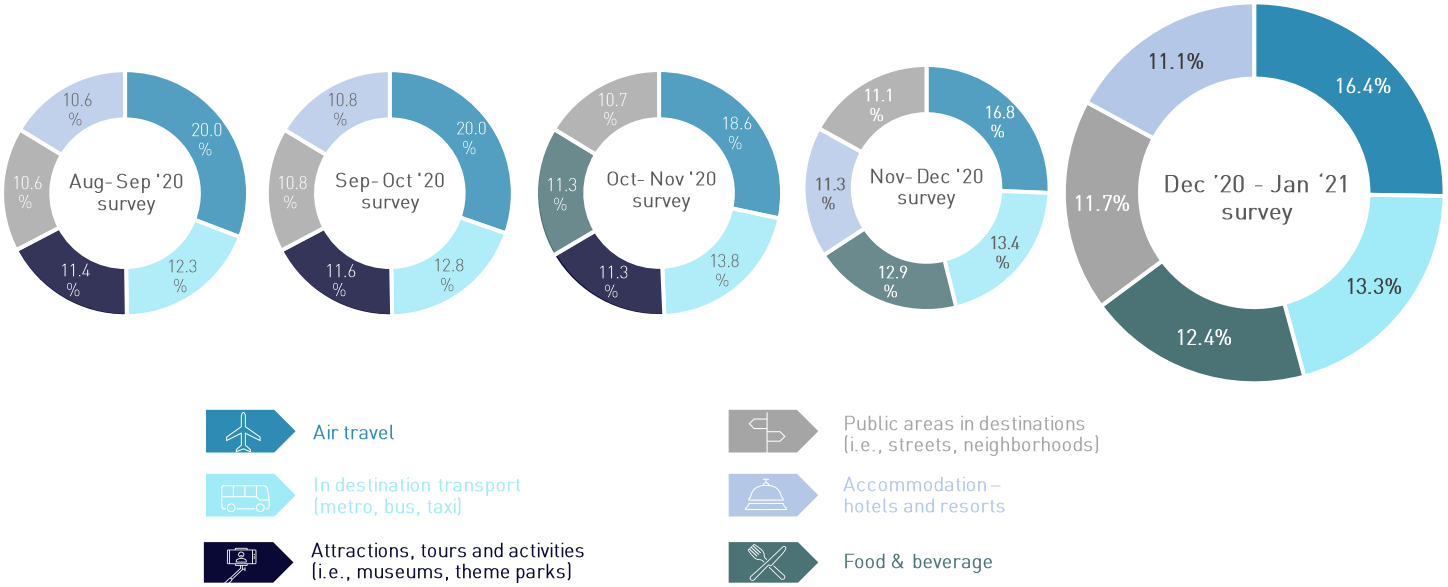
* No significant changes between waves were recorded for this question.

Q4. What currently concerns you the most about travelling within Europe?

No. of respondents: 3,182

Healthwise, Europeans continue to perceive the use of public transportation to and within a destination the riskiest part of a journey

The most worrisome touch points during travel in relation to personal health & safety (Top 5)



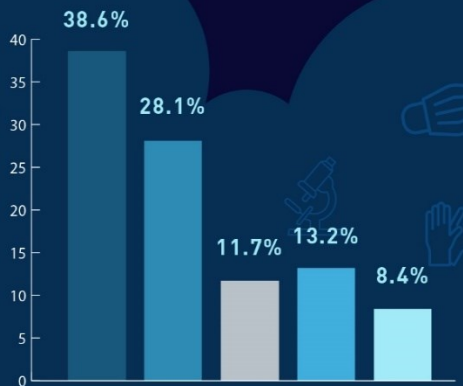
The level of concern regarding personal health & safety while staying at a hotel increases with age: 29% of respondents over 55 choose **accommodation** as their top 3 points of concern vs. 21% among the 18-24 age group

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

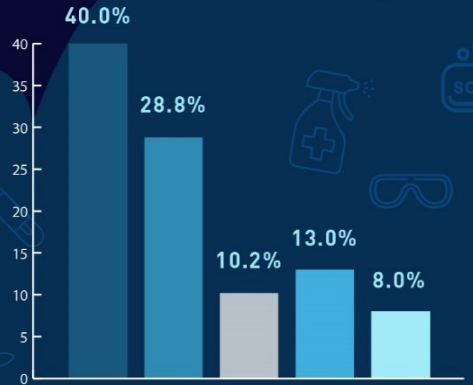
No. of respondents: 5,855

STRICT PROTOCOLS BRING THE PEACE OF MIND TO PROPERLY ENJOY A TRIP:

Strict health and safety protocols in the destination are welcomed by over two-thirds of "early bird" travellers



Nov - Dec '20 survey



Dec '20 - Jan '21 survey

- I feel much safer, knowing that my health is a top concern for the destination
- I feel more relaxed to enjoy my stay
- It does not make any difference to me
- I feel I cannot enjoy everything that a place has to offer
- I feel that strict protocols can damage the joy of travelling

71% of those planning **a domestic trip view strict health and safety protocols** in a positive light, vs. **65%** of those planning **to travel outside of Europe.**

Notes:
- Q18. Please select a response which describes you the most: "When I travel to places with strict health and safety protocols...
- Refers to survey respondents that are most likely to travel by the end of July 2021, n= 3,181
- Data was collected between 18/12/2020 - 7/1/2021

Co-funded by the European Union
EUROPEAN TRAVEL COMMISSION
MINDHAUS Tourism Marketing Strategy

THE UNCERTAINTY CONTROL PANEL

4 KPIs illustrating the level of uncertainty for domestic and intra-European travel

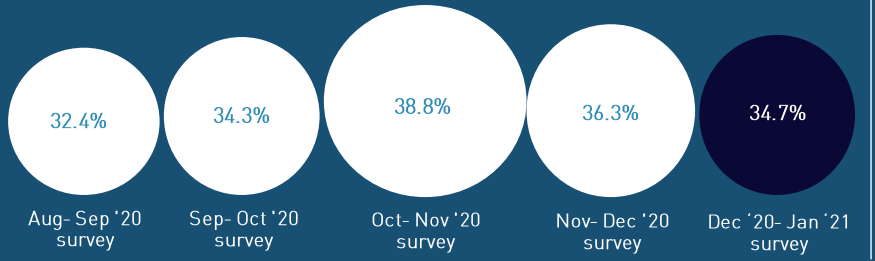


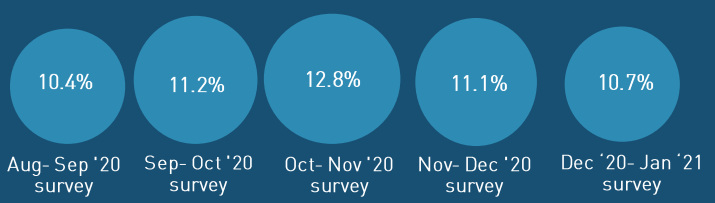
9.5% of respondents consider flexible cancellation policies as an important factor in travel decision-making

6.9% of respondents position booking and cancellation policies as one of the main concerns related to travelling



34.7% of respondents state that they do not know when they will travel next





10.7% of respondents state that they do not know where they intend to travel to in the next 6 months

METHODOLOGICAL ANNEX



04

METHODOLOGICAL ANNEX

THE SURVEY

- Online market research. Survey participants are consumers with at least 2 overnight trips in 2019.
- Distribution/ data collection period:
  - **Wave 1**: 27 August 2020 - 15 September 2020; sample= 5,762/ **Wave 2**: 21 September 2020 – 9 October 2020; sample= 5,876/ **Wave 3**: 19 October 2020 – 6 November 2020; sample= 5,832/ **Wave 4**: 20 November 2020 – 3 December 2020; sample= 5,742/ **Wave 5**: 18 December 2020 – 7 January 2021; sample= 5,855
  - 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).
- 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"was removed from the analysis of wave 5 and will reappear in wave 6 in a revised version considering developments in vaccine rollout.
- Wave 5: 53% of respondents are male and 47% are female. Number of respondents and age group per source country:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	78	96	92	56	135	108	145	**916**
	25 - 34	135	112	74	127	129	153	106	142	91	137	**1206**
	35 - 44	126	135	101	128	141	150	120	97	81	113	**1192**
	45 - 54	138	167	105	84	146	168	93	68	51	69	**1089**
	≥55	263	263	175	83	234	187	125	58	28	36	**1452**
Total		**750**	**750**	**500**	**500**	**746**	**750**	**500**	**500**	**359**	**500**	**5,855**

METHODOLOGICAL ANNEX

TRAVELLERS' ONLINE SENTIMENT

- **Objective**: Benchmark major European tourism destinations in terms of tourist satisfaction and interests based on social media mentions
- **Destinations**: United Kingdom, France, Netherlands, Croatia, Belgium, Germany, Italy, Greece, Portugal and Spain
- **Origin markets**; Germany, United Kingdom, France, Spain, Italy, Switzerland, Belgium, Netherlands, Poland and Austria
- The following **indicators** are analysed:
  - TPI > **The Tourist Products Index,** measures the level of satisfaction with the offer (products) of the destination in its various categories: Arts & Culture, Gastronomy, Sunbathing, etc. This index is obtained by analysing the distribution of positive, negative and neutral comments on Twitter and TripAdvisor.
  - HIS > **The Hotel Satisfaction Index,** measures the level of visitor satisfaction with the entire accommodation sector of a destination based on relevant comments that guests make on TripAdvisor, Expedia and Booking.
- Indexes are calculated by using advanced Natural Language Processing, Artificial Intelligence and Machine Learning techniques to analyse millions of spontaneous tourist interactions on social media or reviews sites.
- Index scoring system: The calculated indices show values between 0 and 100 points as follow:
  - 0 to 24 points: **Very low levels of satisfaction and confidence** and therefore a priority area for reconfiguration.
  - 25 to 49 points: **Relatively low level of satisfaction and confidence**. Considerable potential for improvement.
  - 50 to 74 points: **Good to very good satisfaction level**. Moderate potential for improvement.
  - 75 to 100 points: **Excellent satisfaction and confidence** levels. In some cases there are margins for improvement, although most of them constitute level to maintain and consolidate.

For a more detailed description about the specific indices please visit the following link.

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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) in collaboration with Mabrian Technologies (www.mabrian.com) 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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