MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 6 | 04/21

Co-funded by
the European Union

EUROPEAN TRAVEL COMMISSION

WAVE 6
RESEARCH HIGHLIGHTS

This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the **sixth wave 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.

- **Europeans' desire for travel climbs to its highest level since the survey begun**, with 56% of total respondents planning to take a trip by the end of August. **22% of all surveyed Europeans intend to travel between May and June 2021**, while an additional **36% are in favor of taking trip later in the summer.**
- 29% of **'early-bird' travellers**[1] target the May and June period, while an additional **46% favour July and August for their next trip.** As for destination choice, **49% aim to travel to another European country** and 36% to remain within their domestic borders.
- **Vacations remain the predominant travel motivation for Europeans:** 66% of early-bird travellers will travel for leisure - up from the 56% pre-pandemic benchmark[2], while visiting friends and relatives is the main purpose for 19% of travellers.

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

[2] UNWTO, 2019

WAVE 6
RESEARCH HIGHLIGHTS

- **The impact of COVID-19 vaccines on travel sentiment is fairly positive**; 48% of all surveyed Europeans feel much more confident about planning trips in the next 6 months as a result of the vaccine rollout. 31% have neutral feelings, while 21% of respondents are still very sceptical.
- **Interest in holidays by the sea remains strong**; 34% of early-bird travellers favour this kind of trip. A preference for **nature and the outdoors** is stated by 15% of respondents and is particularly strong among those from central European markets.
- Over **half of early-bird travellers (52%) show a willingness to make their next trip by plane**, though in Britain, there appears to have been a falling off in air travel confidence, with an 11% decrease in this preference. **Car travel remains the second most popular choice** for 36% of Europeans with short-term travel plans.

WAVE 6
RESEARCH HIGHLIGHTS

- Despite the efforts made by EU countries to bolster tourism in face of the pandemic, **Europeans are still experiencing challenges in following their original travel plans**: only 9% of all respondents have not modified plans for their upcoming holidays.
- When it comes to personal health, **air travel** is mentioned by 17% of all Europeans surveyed as **the most worrisome part of the trip**, followed by **visiting bars and restaurants** (13%).
- While **quarantine measures** are the **leading concern** for early-bird travellers (16%), there is growing anxiety (11%) regarding **limitations on activities available and "things to do" at the destination.**

WAVE 6

INSIGHTS ON TRAVELLERS’ ONLINE SENTIMENT

The report is also complemented by insights on travellers’ online sentiment for major European destinations for the period of January 2021 compared to January 2020.[1]

- 36% of all travel **social media mentions** are made by the **35-44 age group** – double the number of those made by the hyper-connected young Millennials age group (aged 25-35).
- In January 2021, the **Tourism Product Index**[2] - measuring tourists’ satisfaction with the offering of European destinations - was 60%, representing a 7% decrease compared to January 2020 and a small 4% increase from December 2020. This slight improvement could indicate that both tourists and destinations are slowly **adapting to tourism in the COVID-19 era.**
- The **Hotel Satisfaction Index**[2] during January 2021 was 64% - the same as in January 2020 and only slightly below its December 2020 level of 66%. Also in this case, **stability indicates an adjustment to the 'new normal'.**

[1] Benchmark report for major European destinations; January 2021 compared to January 2020 (Mabrian Technologies, April 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 49

WAVE 6

RECOMMENDATIONS FOR DESTINATIONS

- **As concerns among travellers regarding the destination experience grow**, NTBs and DMOs[1] should communicate clearly which attractions are currently open and which restrictions/ rules apply to visitors. **Consistent and transparent messaging** will be the key to managing travellers' expectations and re-building confidence.
- Developing and communicating **strict COVID-19 protocols for bars and restaurants** is critical. **Campaigns employing a funnier and engaging approach to COVID-19 measures would boost** consumers' confidence and address health anxieties to visit such places.
- To accommodate **road-trippers and nature seekers**, destinations could offer **special itineraries, off-the-beaten-track experiences** and **outdoor family fun stops**. A good example of **engaging content** would be playlists of local music to accompany car rides, making the experience more immersive.
- **Responsible travel is at the forefront of restarting tourism.** Destinations should undertake initiatives such as brand story telling cultivating a "sense of care", partnering with environmental NGOs and including guests in local community events and activities.

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

*Example: https://mamashelter.com/covid-19/

WAVE 6

RECOMMENDATIONS FOR BUSINESSES

- After a long wait, **businesses should capitalise on the positive travel sentiment and customer confidence** for the spring-summer periods. ‘Buy now - save later’ deals, free upgrades, lead-nurturing strategies and re-marketing campaigns will motivate hesitant customers.
- As many sun and sea destinations announce opening dates, **independent hotels and resorts could strengthen staff training in adjusting to the new circumstances**, further developing resilience thinking, implementing health and safety protocols and using brand values to provide worry-free vacations for their guests.
- **For 3 in 4 Europeans, travel is the time to get together with their family/partner**. Therefore, tourism brands can market themselves as the ideal setting for families and partners to share quality time and extraordinary experiences.
- With travel corridors being agreed between countries and direct bookings on the rise, service providers - accommodation, airlines and car-rental businesses - **could collaborate on discount “fly/drive and stay” packages** and promote them directly to niche audiences.

CONTENTS

How to read

Wave 6

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	Wave 6
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	5-19 Feb '21

2. **To present Wave 6 timings in which respondents are most likely to take their next trip, the following time periods should be used as a reference:**
   - This month; February 2021.
   - In 1-2 months; March – April 2021.
   - In 3-4 months; May – June 2021.
   - In 5-6 months; July – August 2021.
3. **To present data and insights, the following distinct groups have been analysed:**
   - Total respondents; 5,837
   - Respondents with short-term travel plans/ most likely to travel in the next 6 months ("early-bird travellers"); 3,246
   - Respondents selecting outbound European destinations; 4,122
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 sentiment climbs to its highest level since September 2020: 56% of Europeans intend to travel by the end of August 2021

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

Poland
79.2%

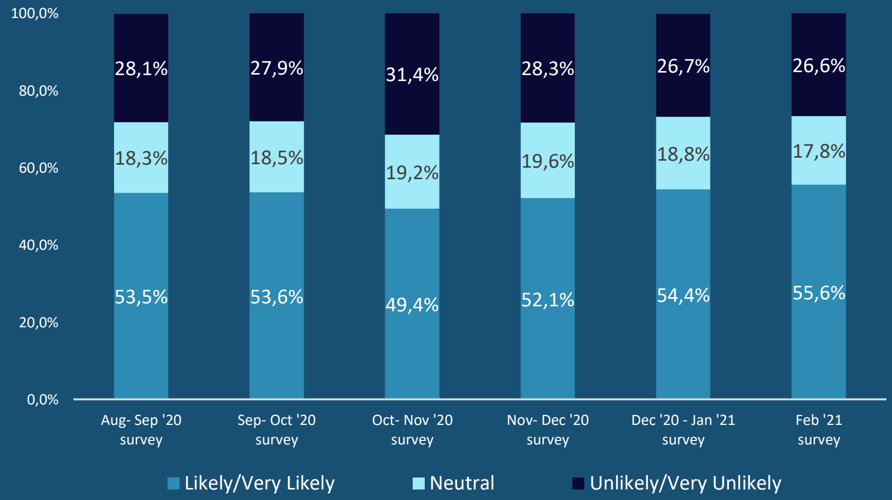
Italy
63.7%
▲ 5%

Austria
56.6%

Germany
56.3%
▲ 10%

Netherlands
55.8%
▲ 15%

Intention 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?

No. of respondents: 5,837

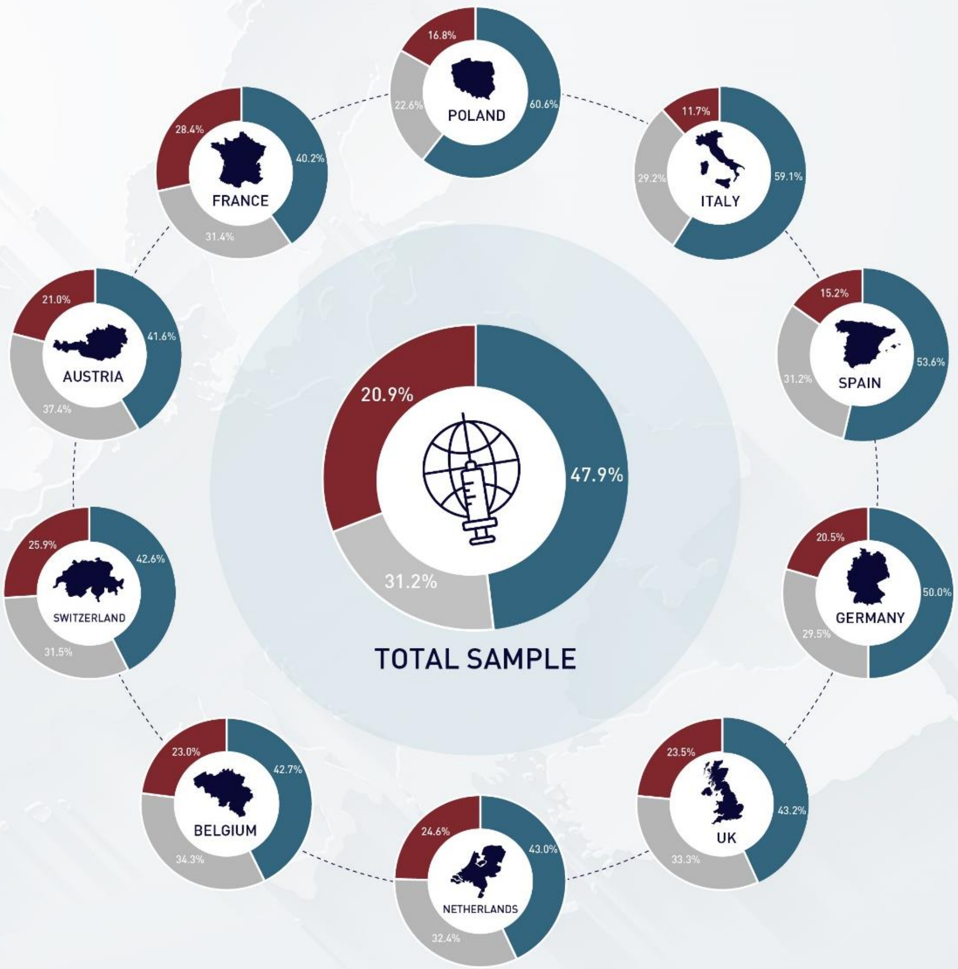
FEB '21 SURVEY

1 IN 2 EUROPEANS FEEL MORE OPTIMISTIC ABOUT TRAVEL AS A RESULT OF THE VACCINE ROLLOUT

COVID-19 vaccine sparks more optimism among respondents over the age of 45 (52%), compared to respondents aged 44 and below (45%).

- Agree/Strongly agree
- Neutral
- Disagree/Strongly disagree

The effect of the COVID-19 vaccine on traveller confidence

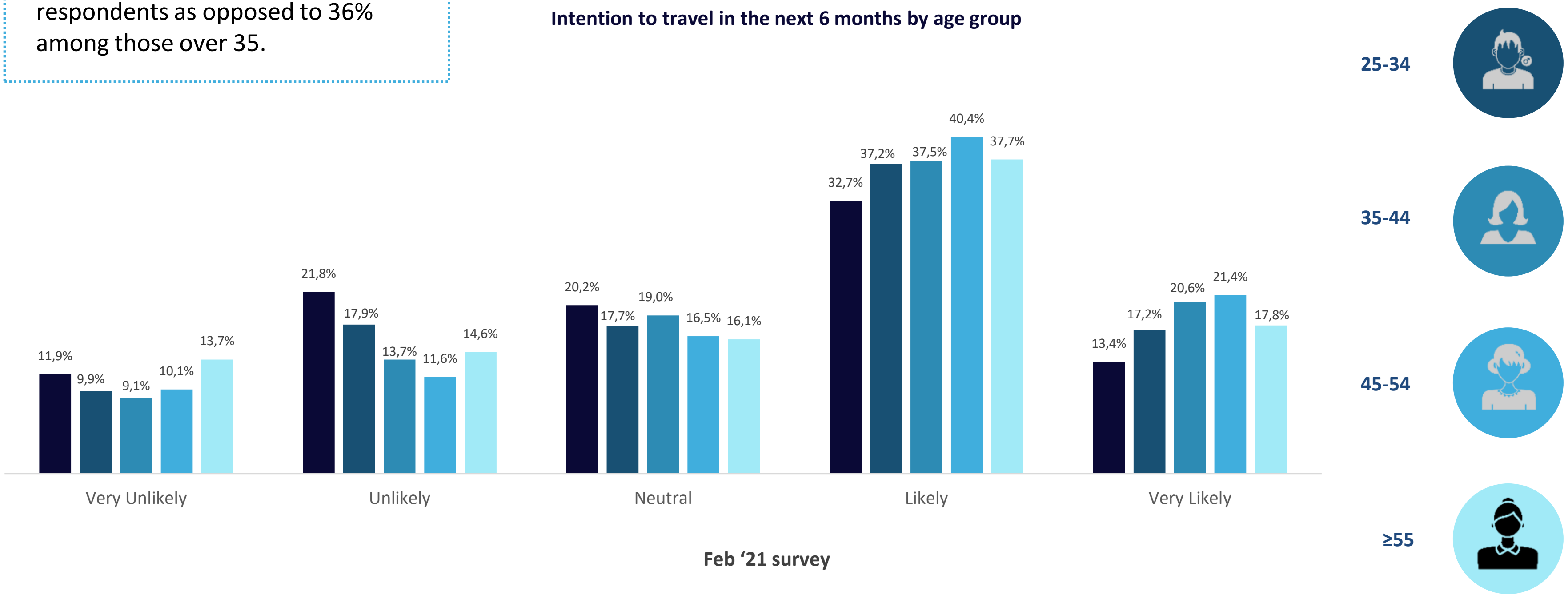


Q22.To what extent do you agree/ disagree with the following statement: 'Now that a treatment/ vaccine for COVID-19 has been found, I feel much more optimistic and confident about planning trips in the next six months'.

No. of respondents: 5,837

Interest in travel by summer's end surges among 45 to 55-year-olds, while Gen Z (18-24) hesitancy persists

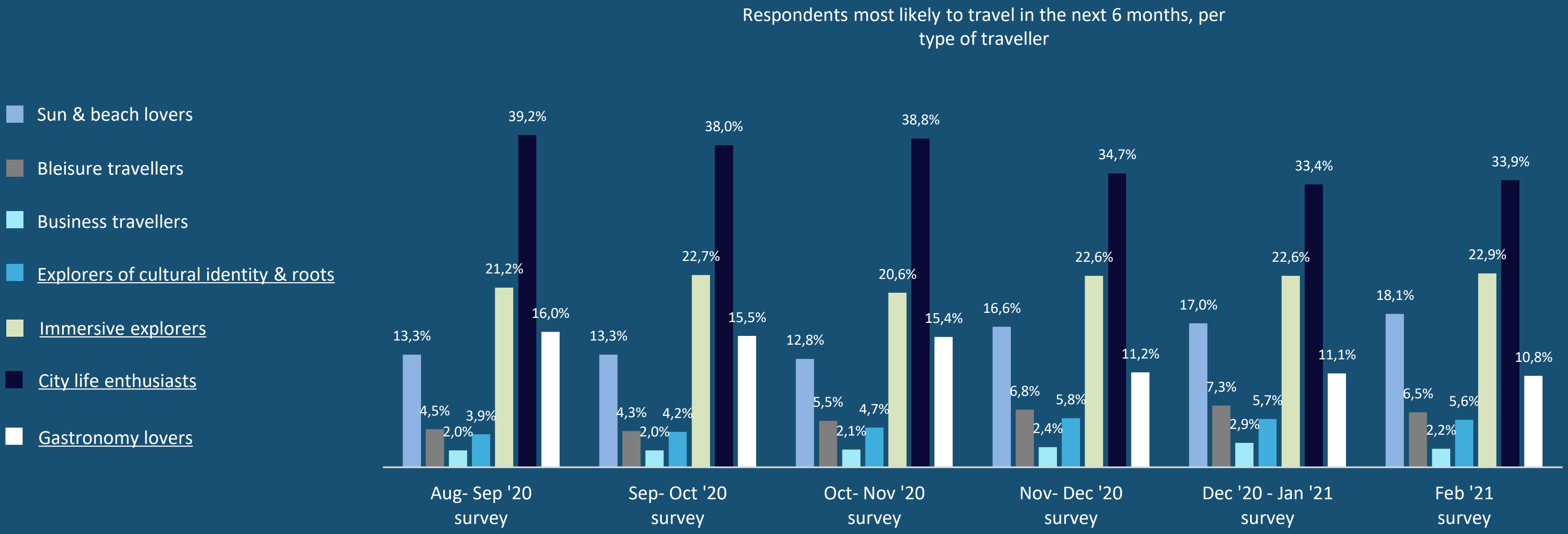
Vaccine rollout brings travel confidence in only 28% of Gen Z respondents as opposed to 36% among those over 35.



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: 5,837

Despite rise in interest for sun and beach holidays, urban destinations maintain a steady fascination among European travellers

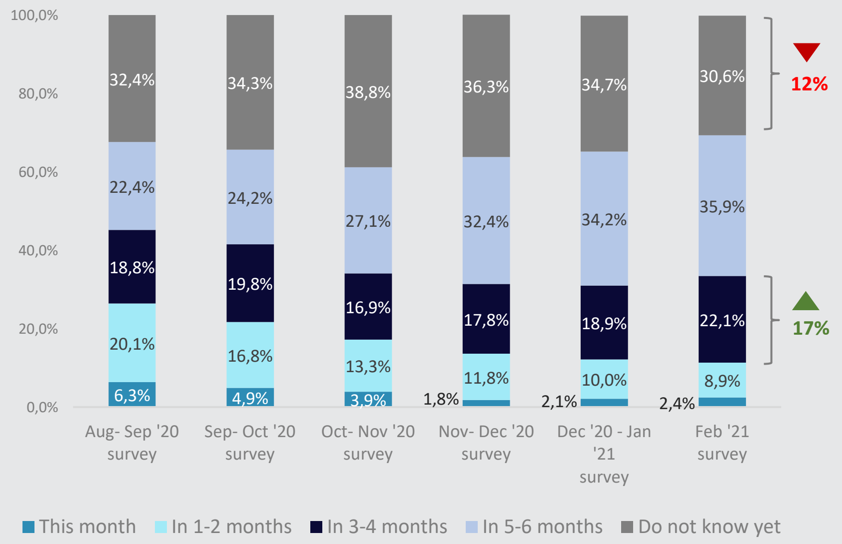


Q7.Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

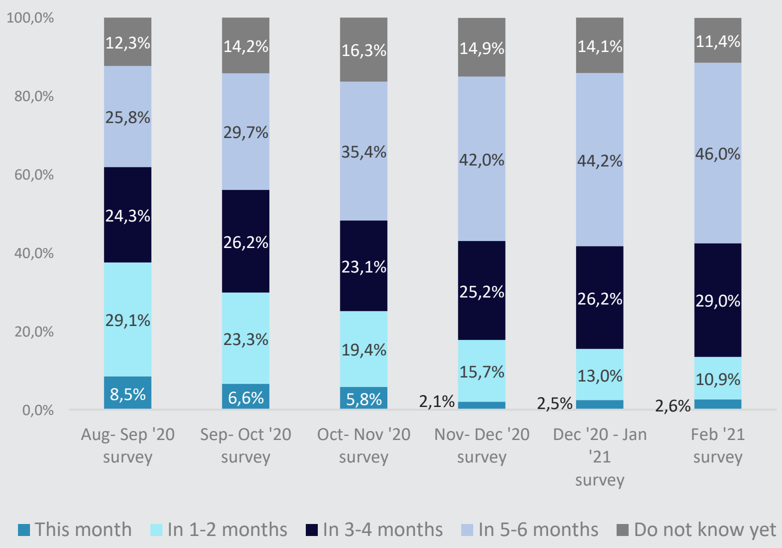
No. of respondents: 3,246

The overall sample displays increasing certainty about trip timing, with many eyeing July-August

When will Europeans travel next?
Total sample vs. early-bird travellers



No. of respondents: 5,837

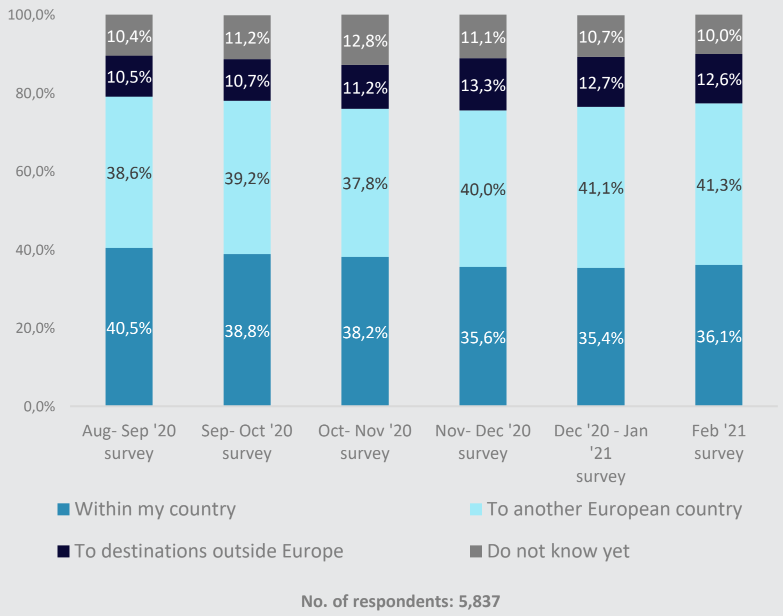


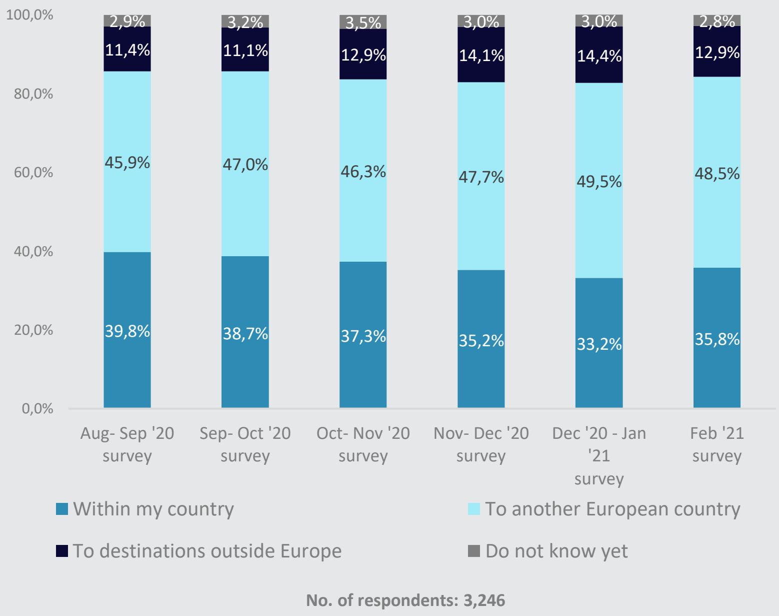
No. of respondents: 3,246

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

International travel within Europe remains respondents' leading choice, a trend that is even stronger among "early-bird" travellers

Where will Europeans travel within the next 6 months?
Total sample vs. early-bird travellers





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

Feb '21 survey

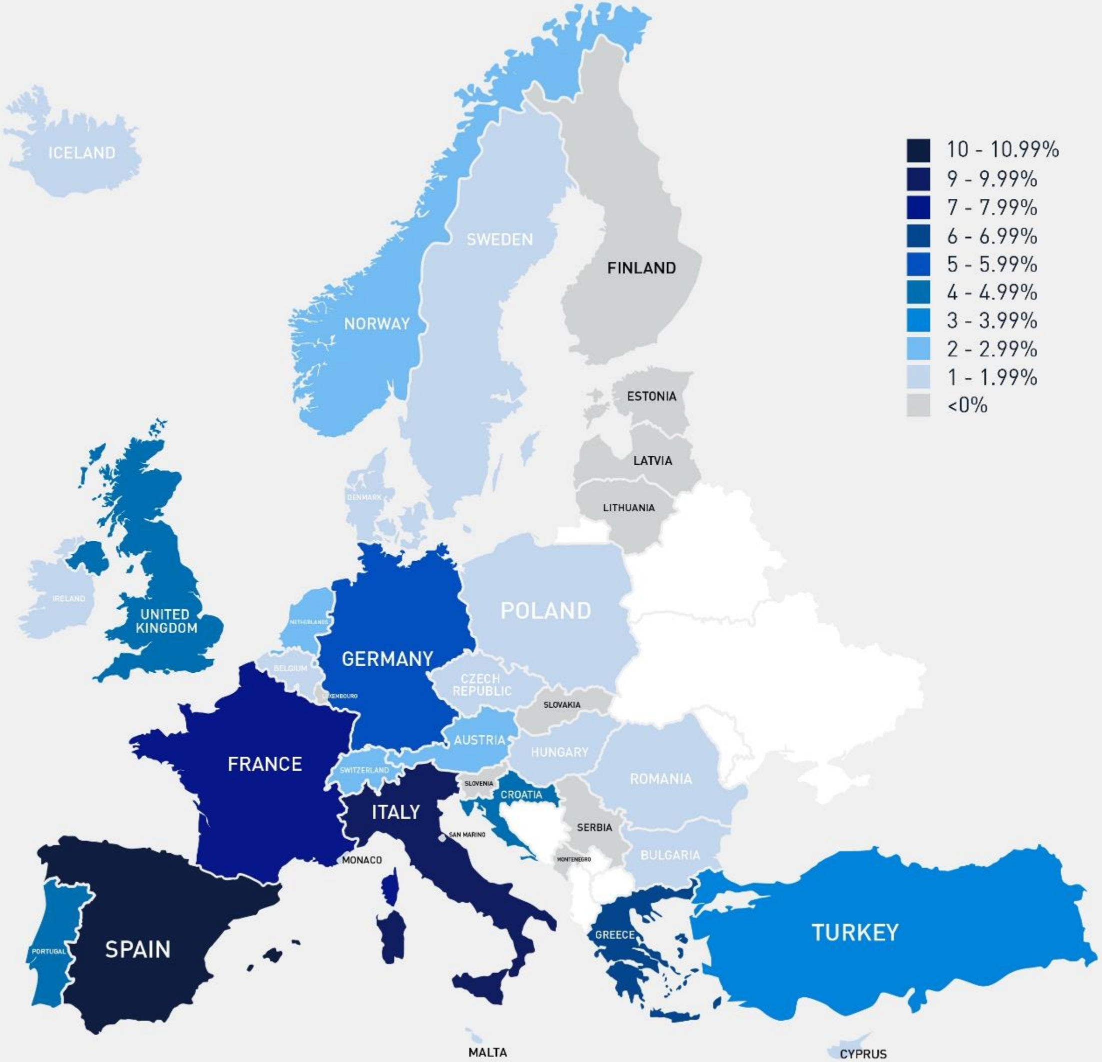
PREFERRED COUNTRIES FOR THE NEXT EUROPEAN TRIP

Italy narrows the gap with Spain while top 5 destinations hold their positions

TOP 10 COUNTRIES

Spain	10.4%
Italy	9.0%
France	7.0%
Greece	6.2%
Germany	5.2%
Portugal	4.7%
United Kingdom	4.2%
Croatia	4.0%
Turkey	3.5%
Netherlands	2.9%

Please use this map as a reference only



* No significant changes between waves were recorded for this question

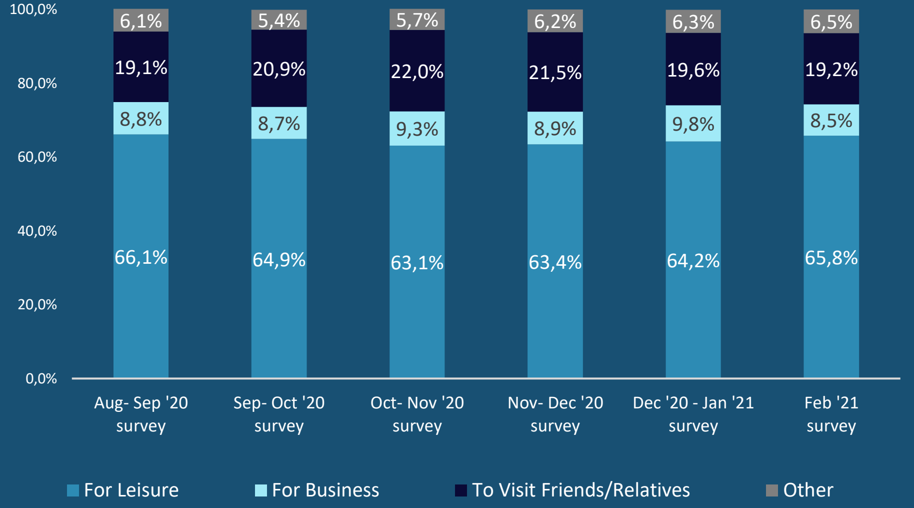
No. of respondents: 4,122

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

Leisure is the predominant travel motivation for the upcoming spring and summer

Top 3 markets to resume leisure travel		Top 3 markets to resume business travel	
Poland	74.7% ▲ 15%	**Germany**	11.1%
Italy	72.8%	**Spain**	10.8%
Belgium	68.3%	**Netherlands**	10.4%

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



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

No. of respondents: 3,246

Over 1 in 3 Europeans with upcoming travel plans will head for the sea, while scenic natural settings are in demand for 15% of respondents

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

Feb '21 survey

72% **of respondents planning a culture and heritage trip see health & safety protocols in a positive light, vs. 62% of those planning to travel for nature and outdoors**

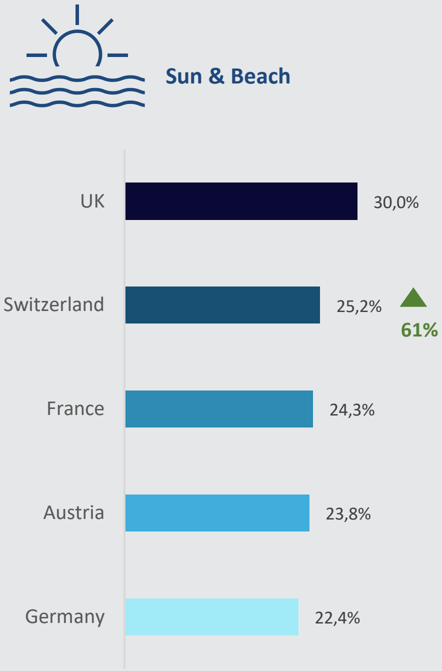
*** No significant changes between waves were recorded for this question**

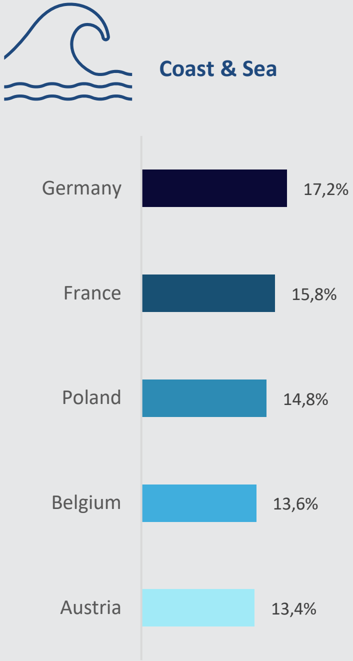
Q17.What type of leisure trip within Europe are you most likely to undertake next?

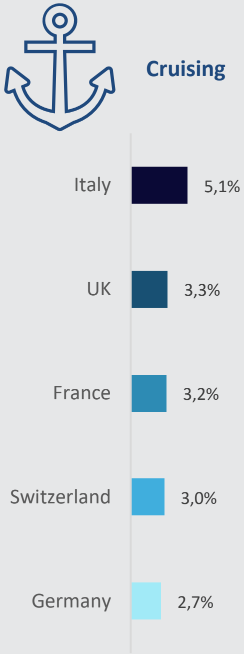
No. of respondents: 3,246

Holiday preferences remain unchanged except for a 61% rise in sun and beach interest among the Swiss

Feb '21 survey







How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 30.0% of respondents from UK are most likely to undertake a sun and beach trip

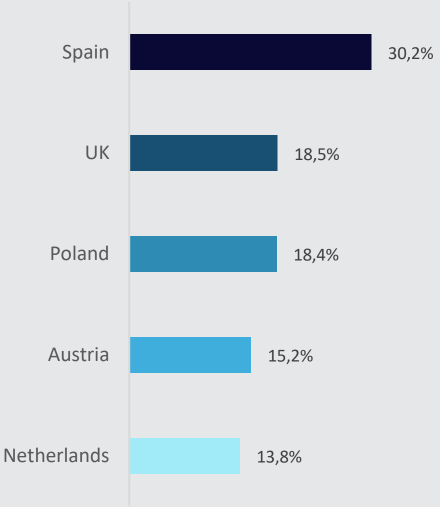
No. of respondents: 5,837

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

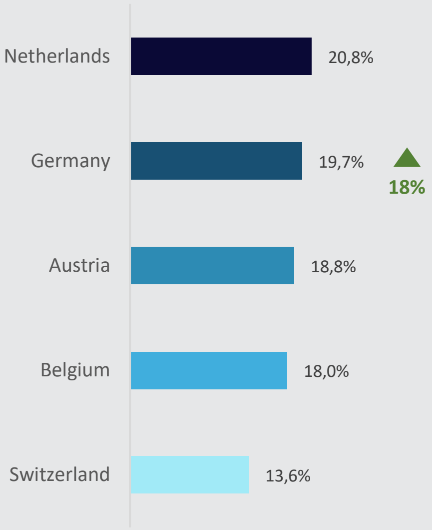
The great outdoors holds a particular appeal for Central Europeans and residents of Benelux countries

Feb '21 survey

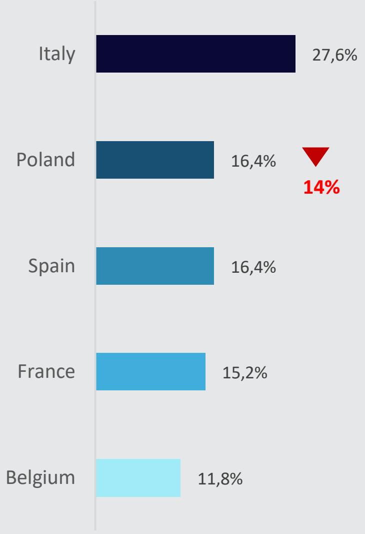
City Break



Nature & Outdoors



Culture & Heritage



How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 30.2% of respondents from Spain are most likely to undertake a city break trip

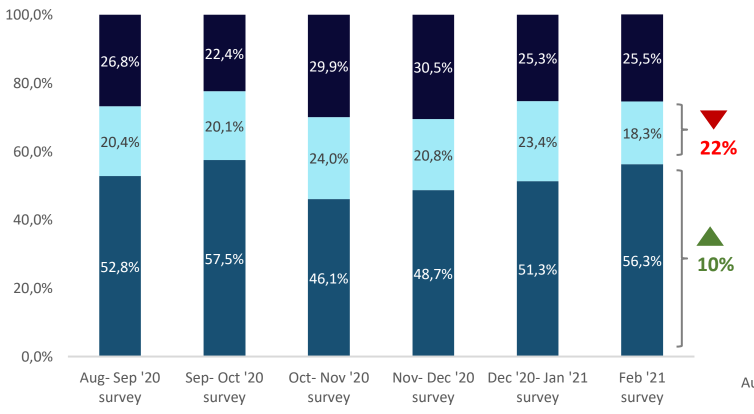
No. of respondents: 5,837

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

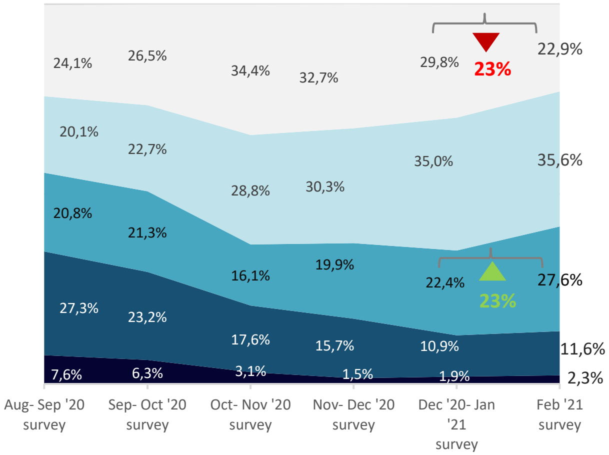
GERMANY

More than 1 in 2 Germans are optimistic about travelling in the next 6 months, with a particular emphasis on July and August trips

Willingness to travel in the next 6 months

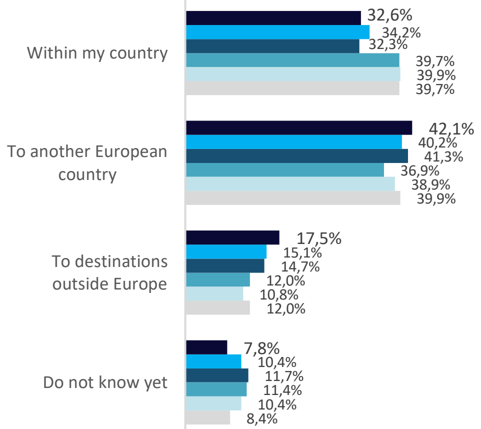


When will Germans travel?



For specific dates please refer to slide 9

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?

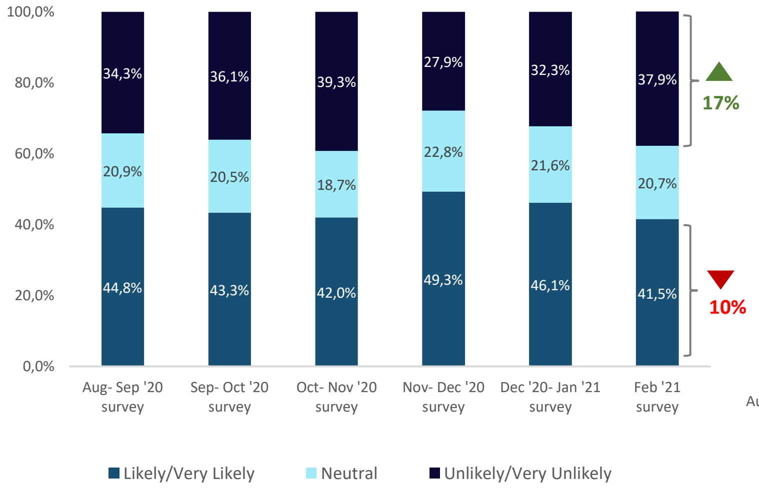
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 750

UNITED KINGDOM

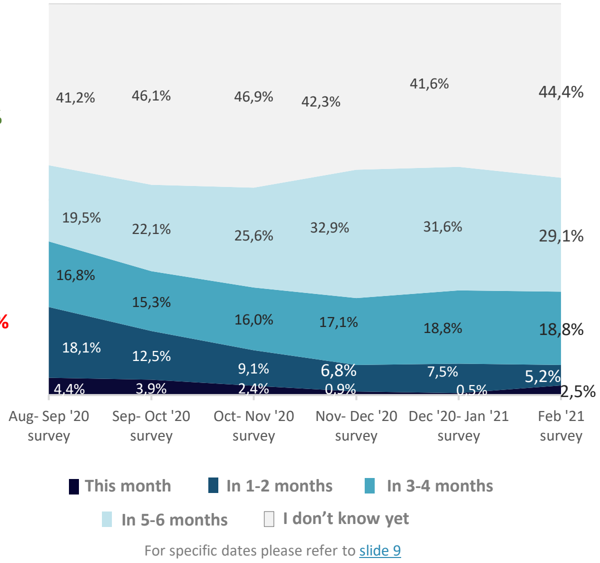
Britons' sentiment greatly deteriorates in light of UK government advice against non-essential international travel*

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?

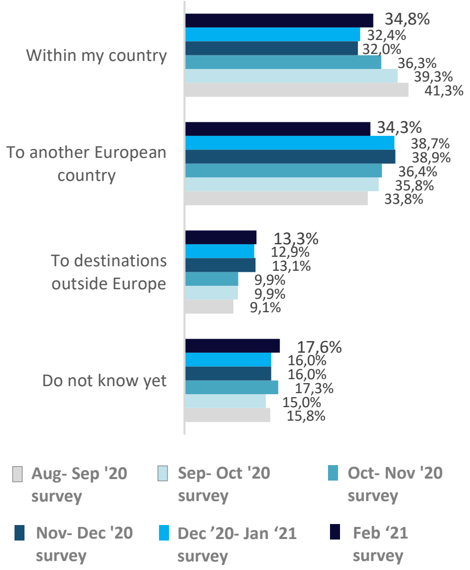
When will Britons travel?



For specific dates please refer to slide 9

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?

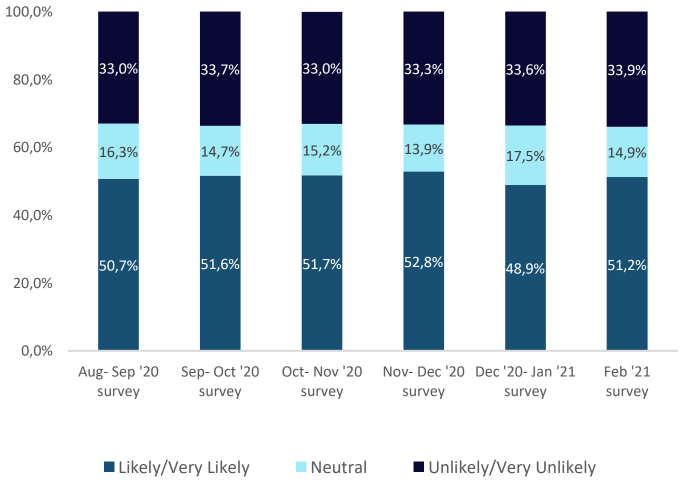
No. of respondents: 750

*The survey was conducted before the roadmap for lifting UK lockdown was announced

FRANCE

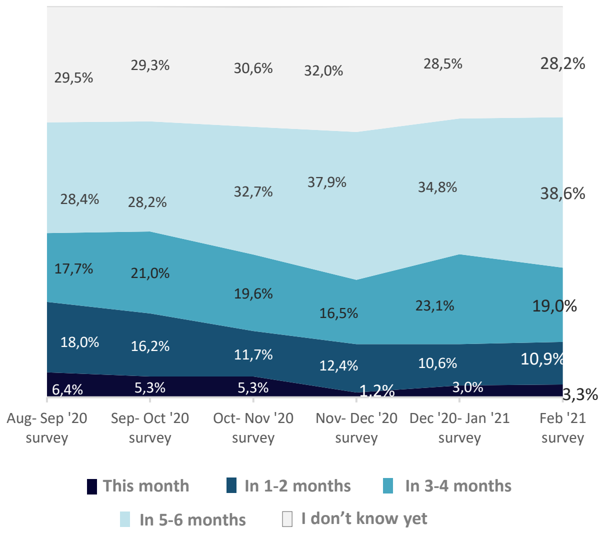
The French maintain a stable travel sentiment with 39% looking at July and August for their next vacations

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?

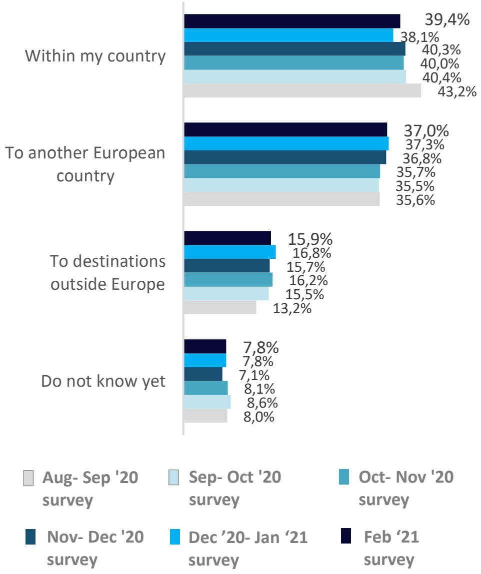
When will French travel?



For specific dates please refer to slide 9

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?



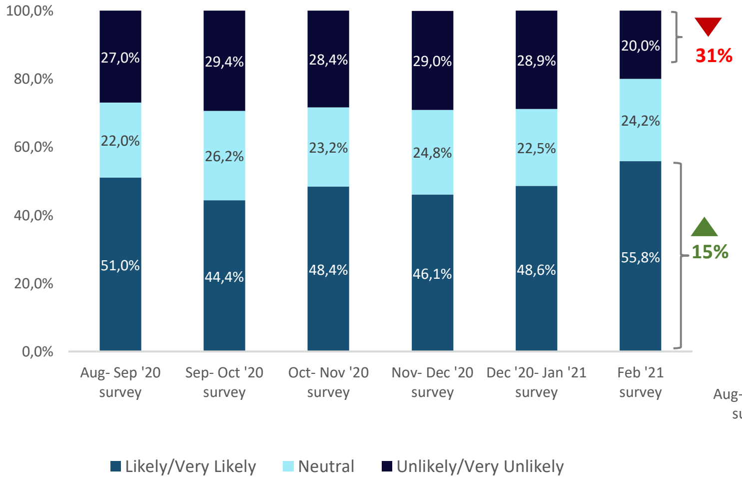
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 691

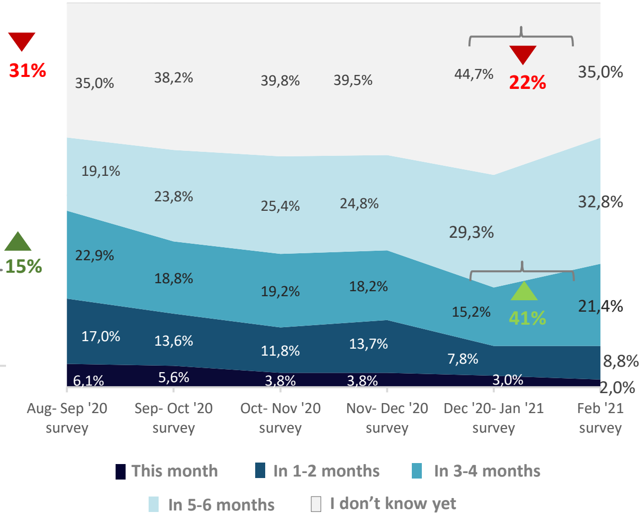
NETHERLANDS

The Dutch are now more interested in taking a trip during the next 6 months (+15%), with destinations abroad* becoming more appealing (+7%)

Willingness to travel in the next 6 months

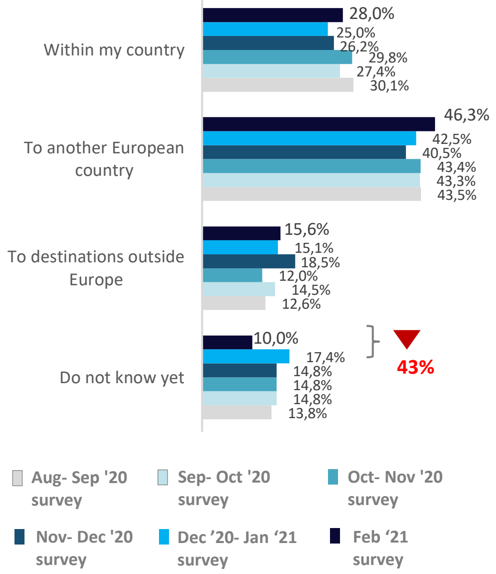


When will Dutch travel?



For specific dates please refer to slide 9

Where will Dutch 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?

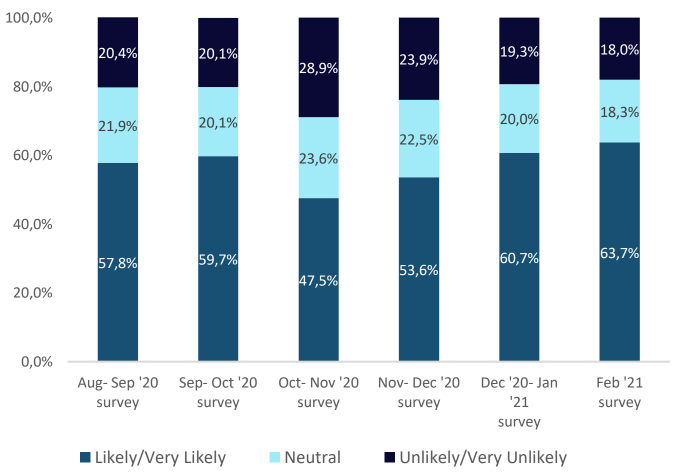
Q10.Where do you plan to travel in the next 6 months?

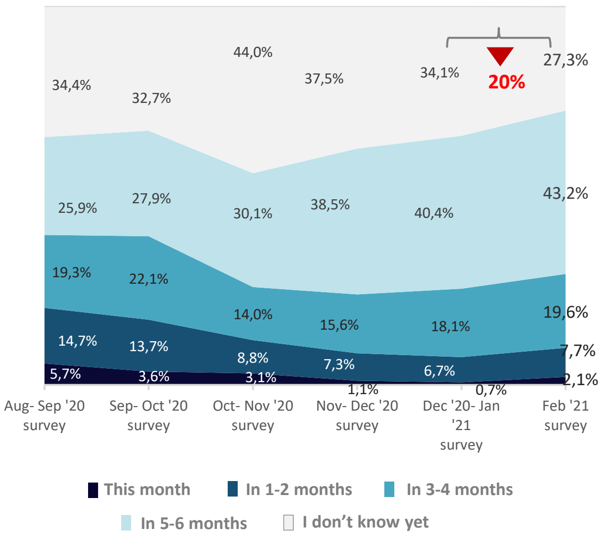
No. of respondents: 500

*Refers to other European countries and countries outside Europe.

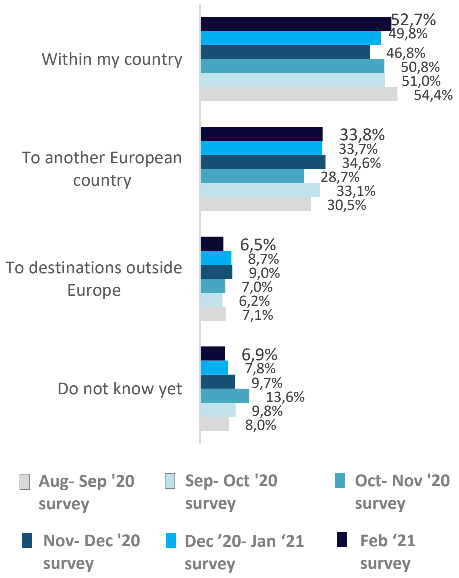
ITALY

2 in 5 Italians plan to take a trip around mid to late summer, favouring domestic destinations





For specific dates please refer to slide 9



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?

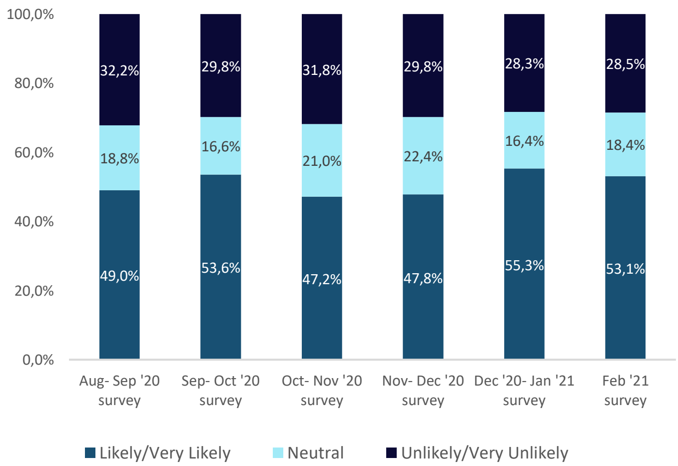
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 750

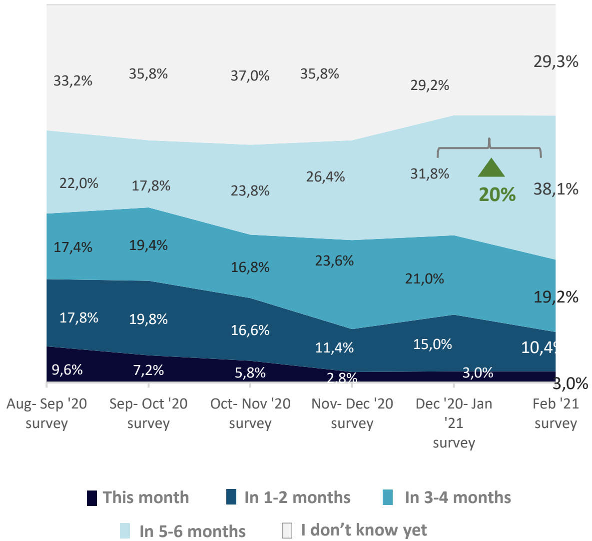
BELGIUM

Belgian respondents show preference for intra-European travel with July and August (+20%) perceived as the most feasible time for trips

Willingness to travel in the next 6 months

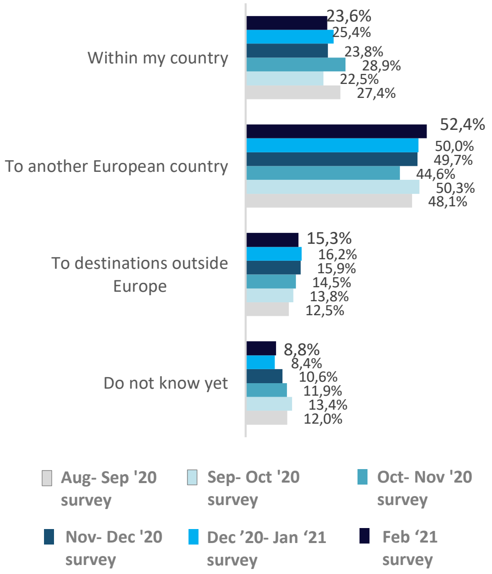


When will Belgians travel?



For specific dates please refer to slide 9

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?

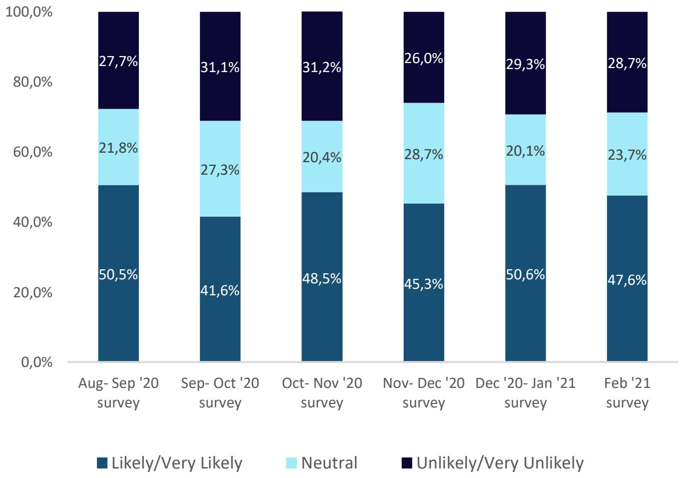
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 499

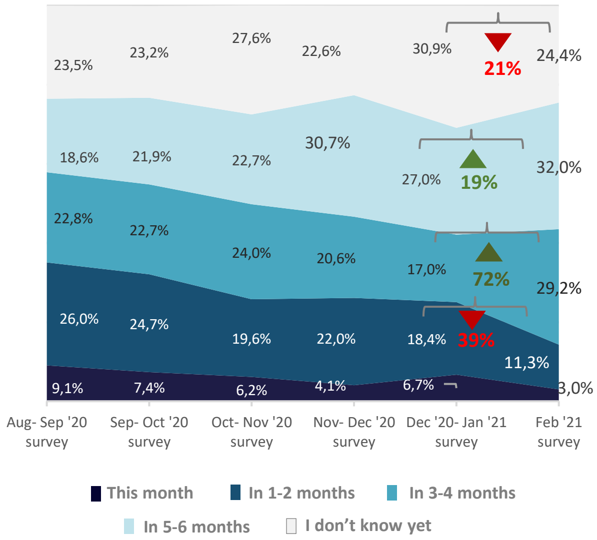
SWITZERLAND

The Swiss are starting to pinpoint exact timing of their next trip, reporting a 72% surge in their travel plans for the period May-June 2021

Willingness to travel in the next 6 months

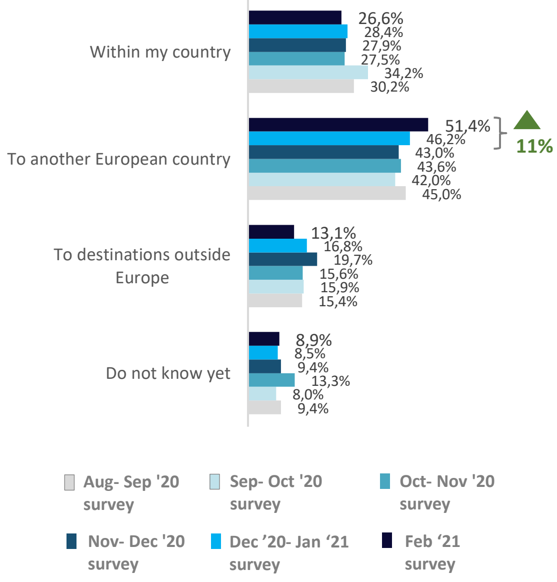


When will Swiss travel?



For specific dates please refer to slide 9

Where will Swiss 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?

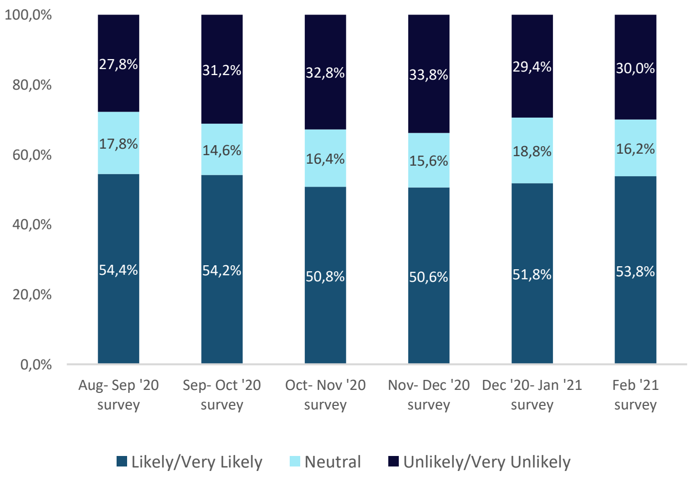
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 397

SPAIN

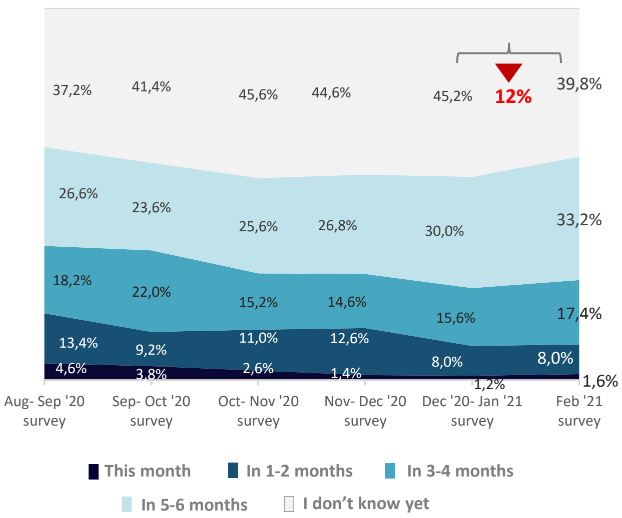
Spanish respondents display the second strongest desire for domestic travel from all surveyed markets, without committing to an exact date

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?

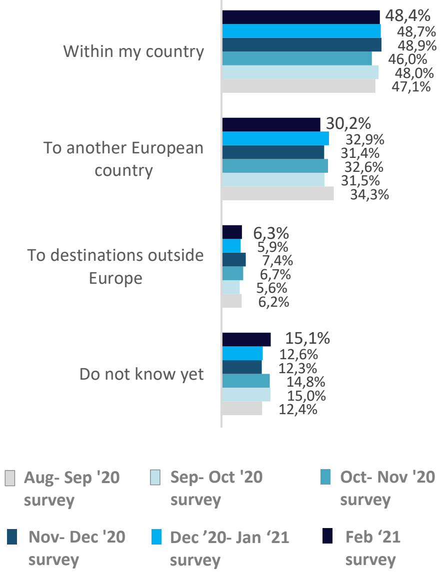
When will Spaniards travel?



For specific dates please refer to slide 9

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?

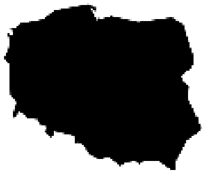


Q10.Where do you plan to travel in the next 6 months?

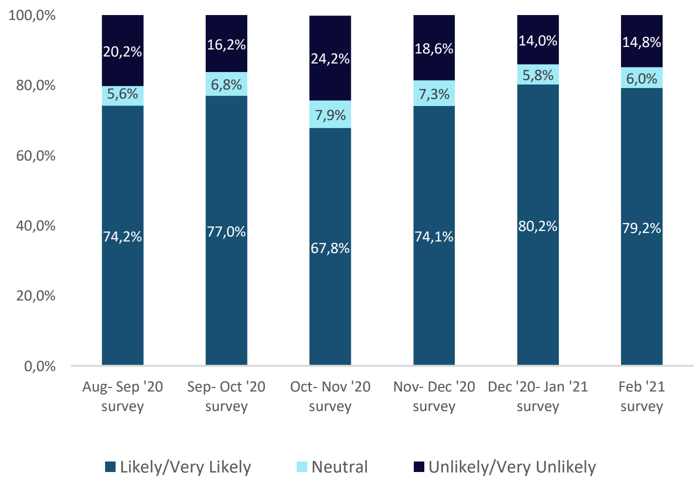
No. of respondents: 500

POLAND

Eager to be on the move, more Poles (+61%) are targeting May and June and are primarily interested in visiting foreign destinations

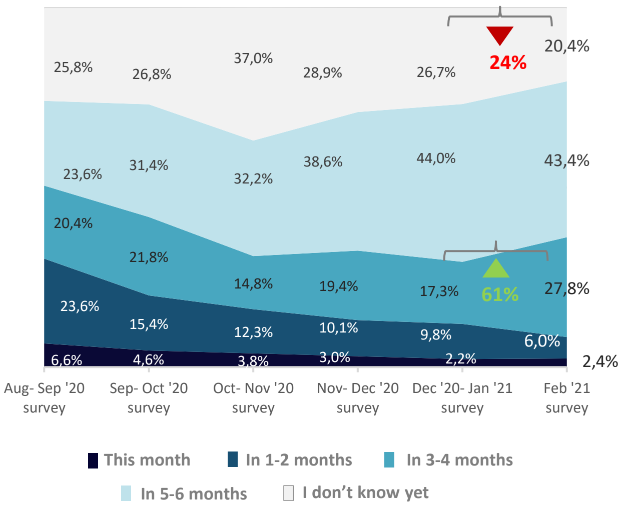


Willingness to travel in the next 6 months



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

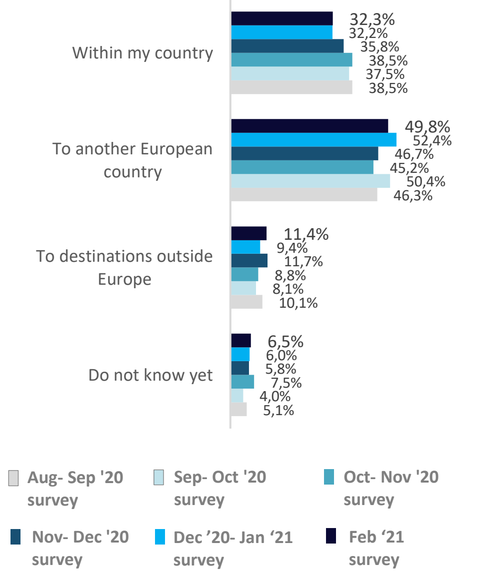
When will Poles travel?



For specific dates please refer to slide 9

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

Where will Poles travel within the next 6 months?



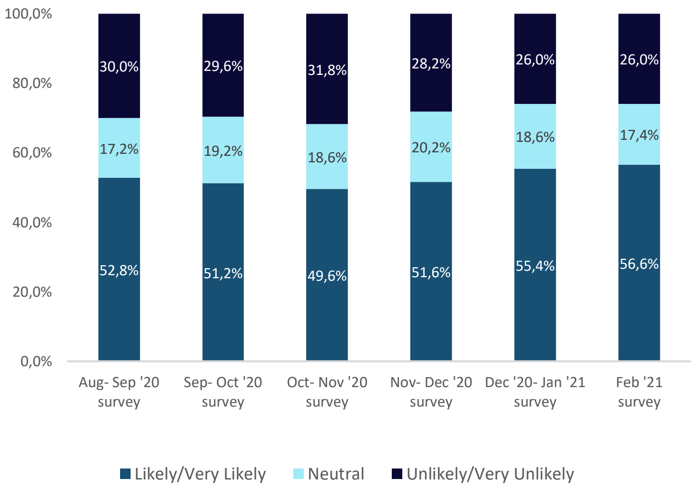
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 500

AUSTRIA

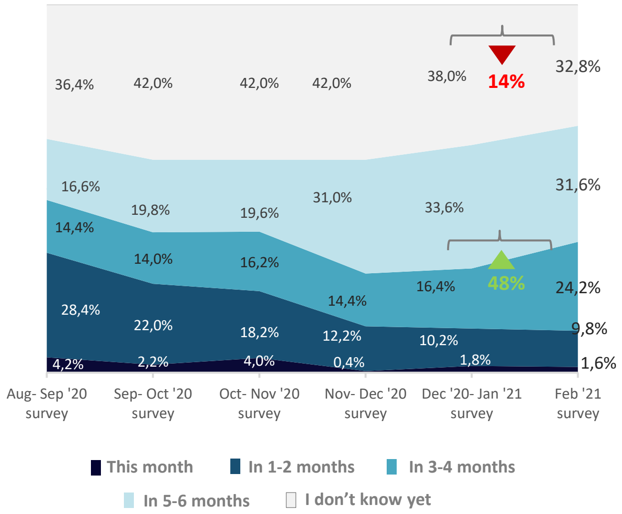
Austrians are now keener on travel than at any time in the last 6 months, with a 48% rise in planned trips for May and June

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?

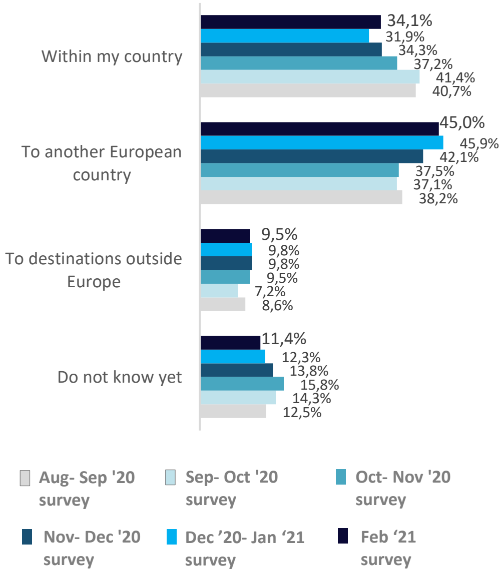
When will Austrians travel?



For specific dates please refer to slide 9

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?

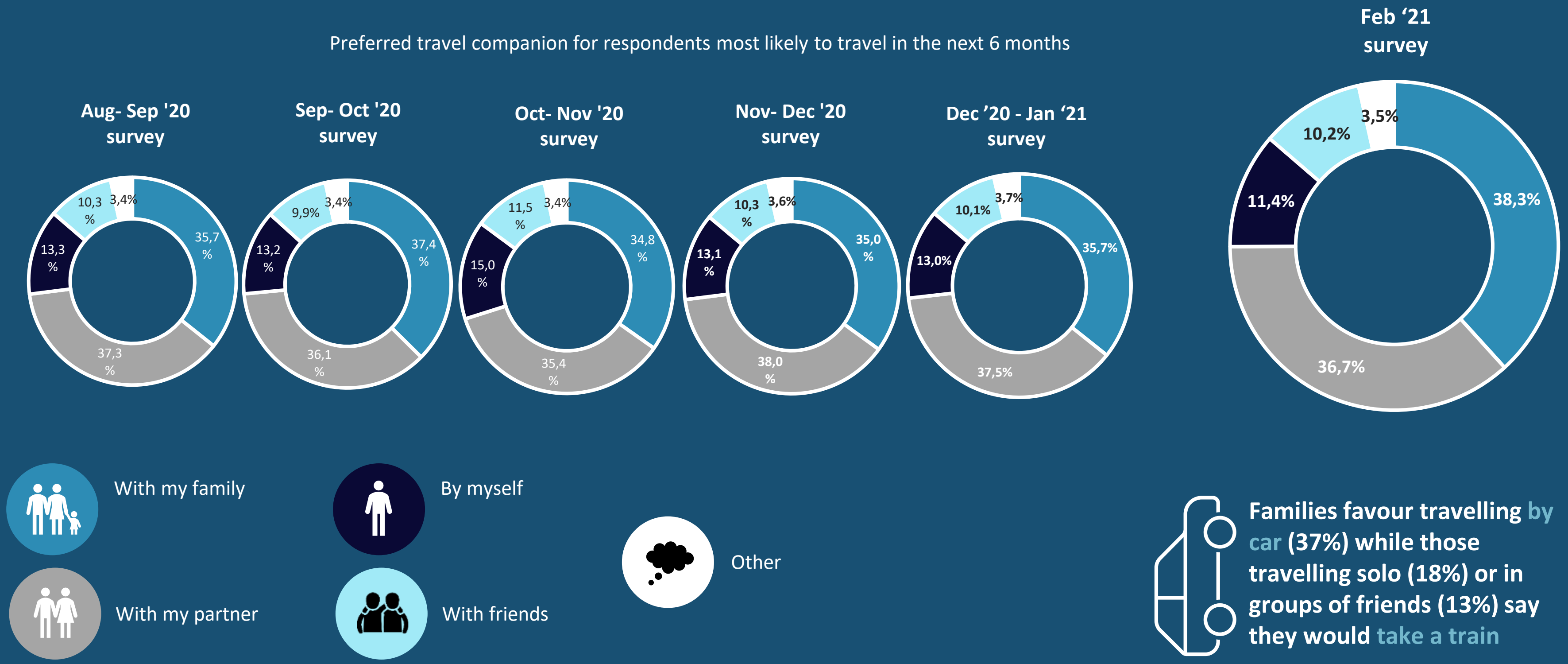
No. of respondents: 500

TRIP PLANNING

02

3 in 4 Europeans will use their next trip for spending time with their family or partner

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



Families favour travelling by car (37%) while those travelling solo (18%) or in groups of friends (13%) say they would take a train

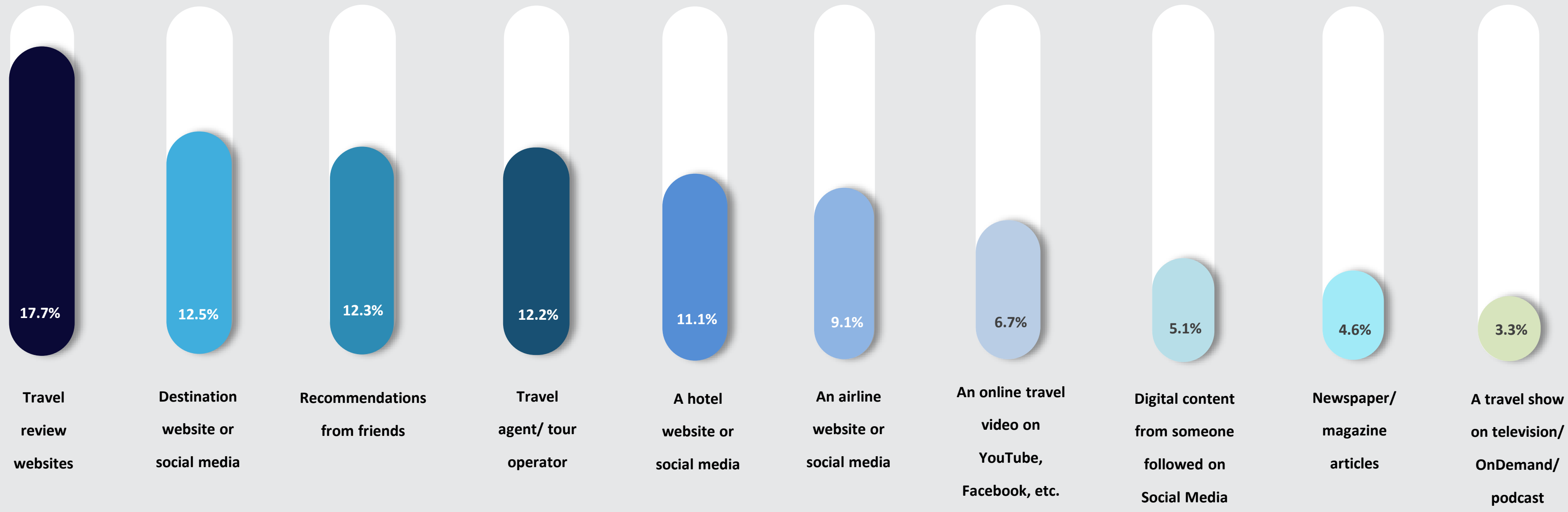
* No significant changes between waves were recorded for this question

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

No. of respondents: 3,246

Europeans tap review websites and destinations' digital touchpoints when planning their next getaways

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



Feb '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

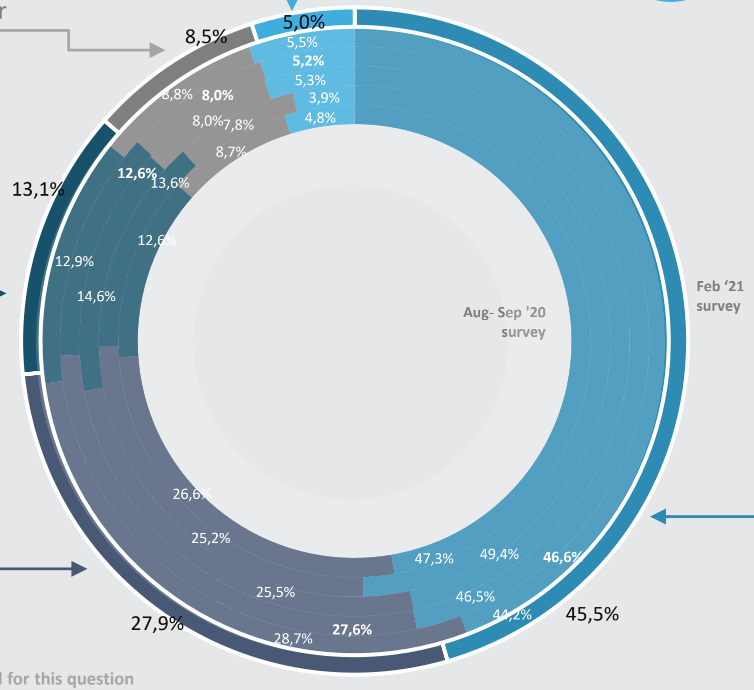
No. of respondents: 3,246

Booking methods are consistent with previous survey waves, with online booking engines (45.5%) way ahead

8.5%
Package holiday through a Tour Operator

5.0%
Corporate travel office

13.1%
Travel agent/ travel designer



Respondents choosing to book directly with the service provider, value more the flexible cancellation policies and special deals compared to the general sample

45.5%
Online booking engine

27.9%
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: 3,246

Although more than half of early-bird travellers plan to fly for their next trip, Britons (-11%) are now slightly more reluctant

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

Italy
67.4%

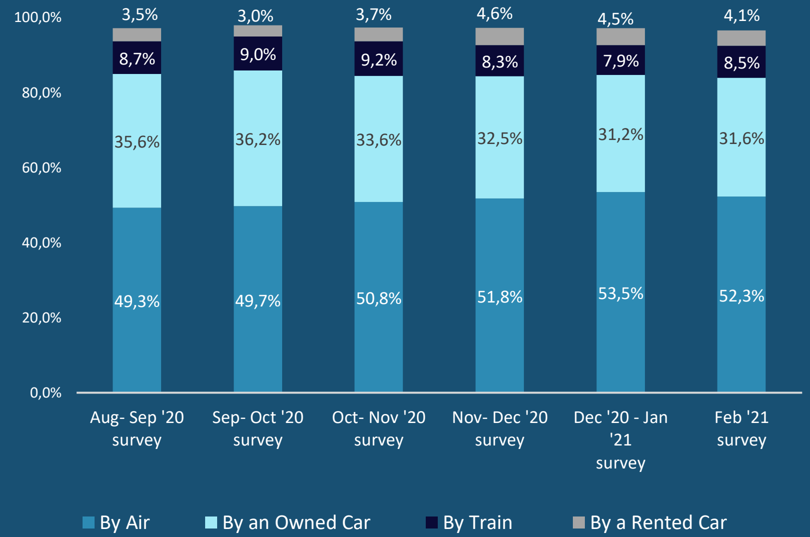
Poland ▲ 13%
59.3%

Spain
65.4%

France
58.2%

UK ▼ 11%
60.5%

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

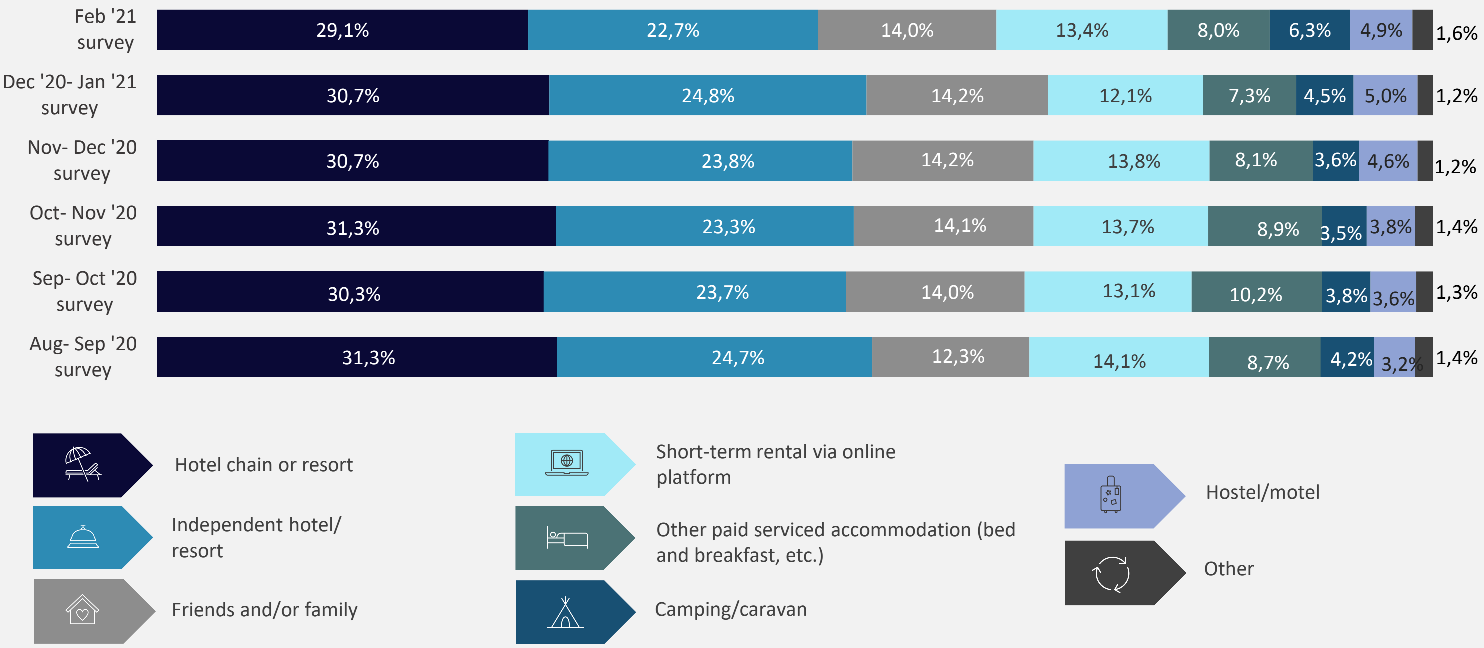


No. of respondents: 3,246

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

Although staying at a hotel or resort is less popular than in previous waves, it prevails as the go-to option for 52% of respondents

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



Hotel chains/ resorts are popular among business travellers (36%) and sun & beach travellers (35%)

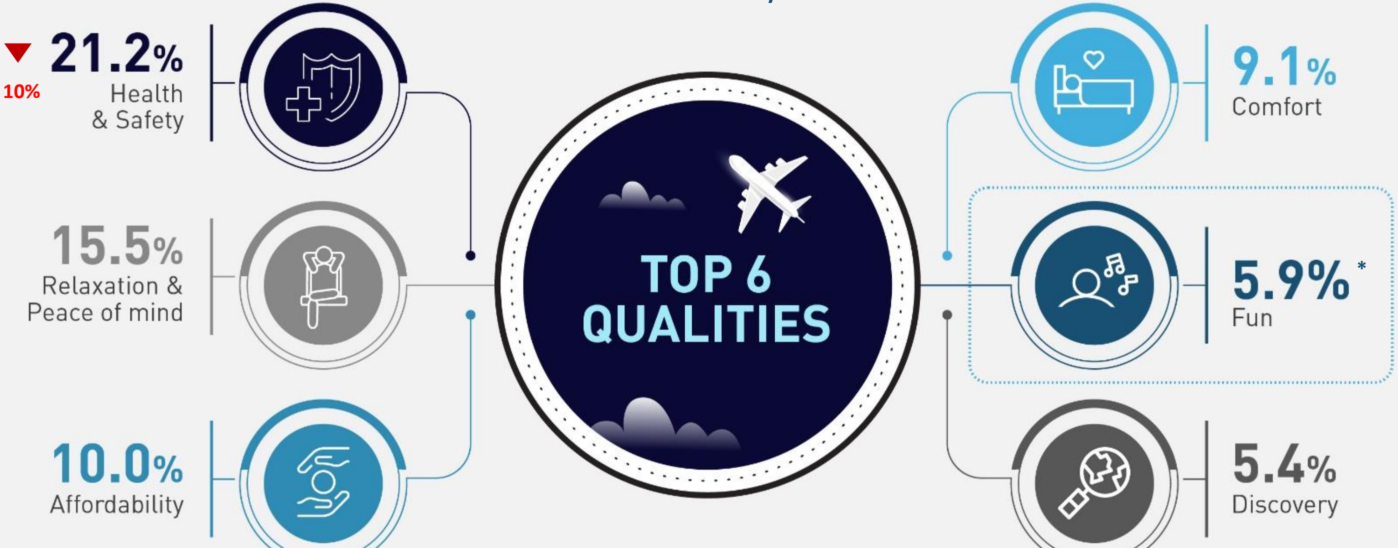
* No significant changes between waves were recorded for this question

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

No. of respondents: 3,246

With relaxation, comfort and fun higher on everyone's agenda, COVID-19's grip on travel sentiment begins to slightly loosen

Feb '21 survey



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

*It is the first time for 'Fun' to appear in the top 6 travel qualities

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

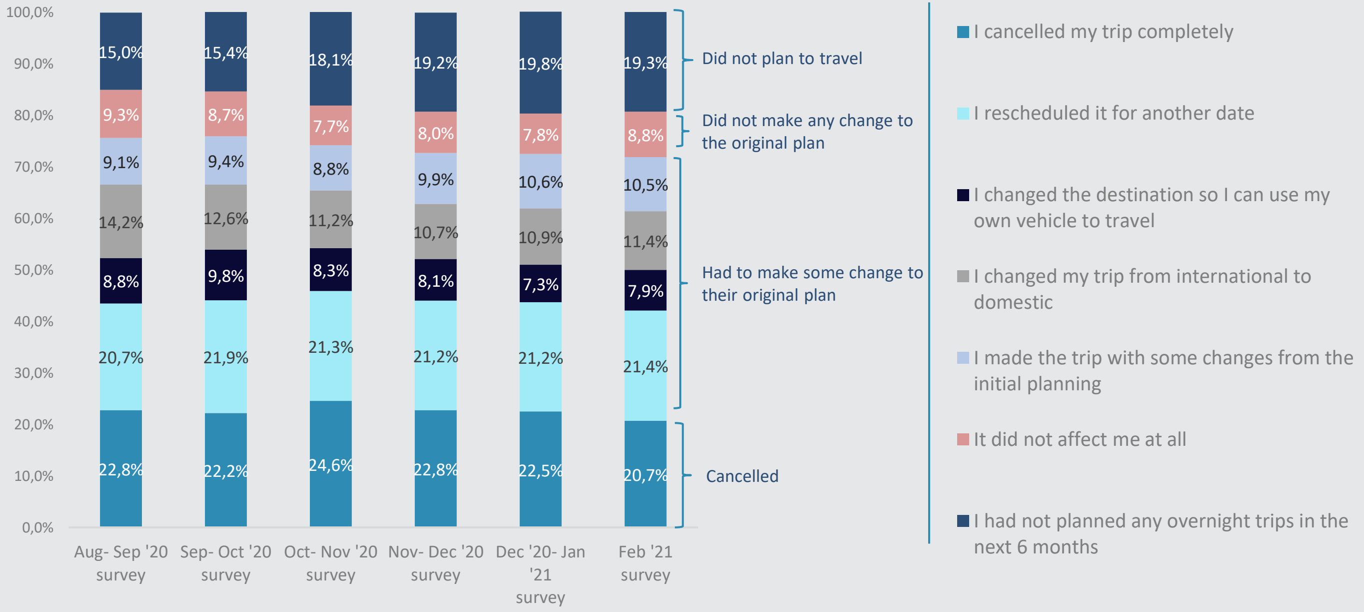
No. of respondents: 5,837

TRAVEL CONCERNS

03

Despite Europe-wide efforts, travellers still face challenges sticking to their original plans. The majority shared that they had to reschedule or change their destination

How has COVID-19 affected travel plans



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

Austria 19.8% ▲ 38%

Germany 17.1% ▲ 19%

Poland 15.8%

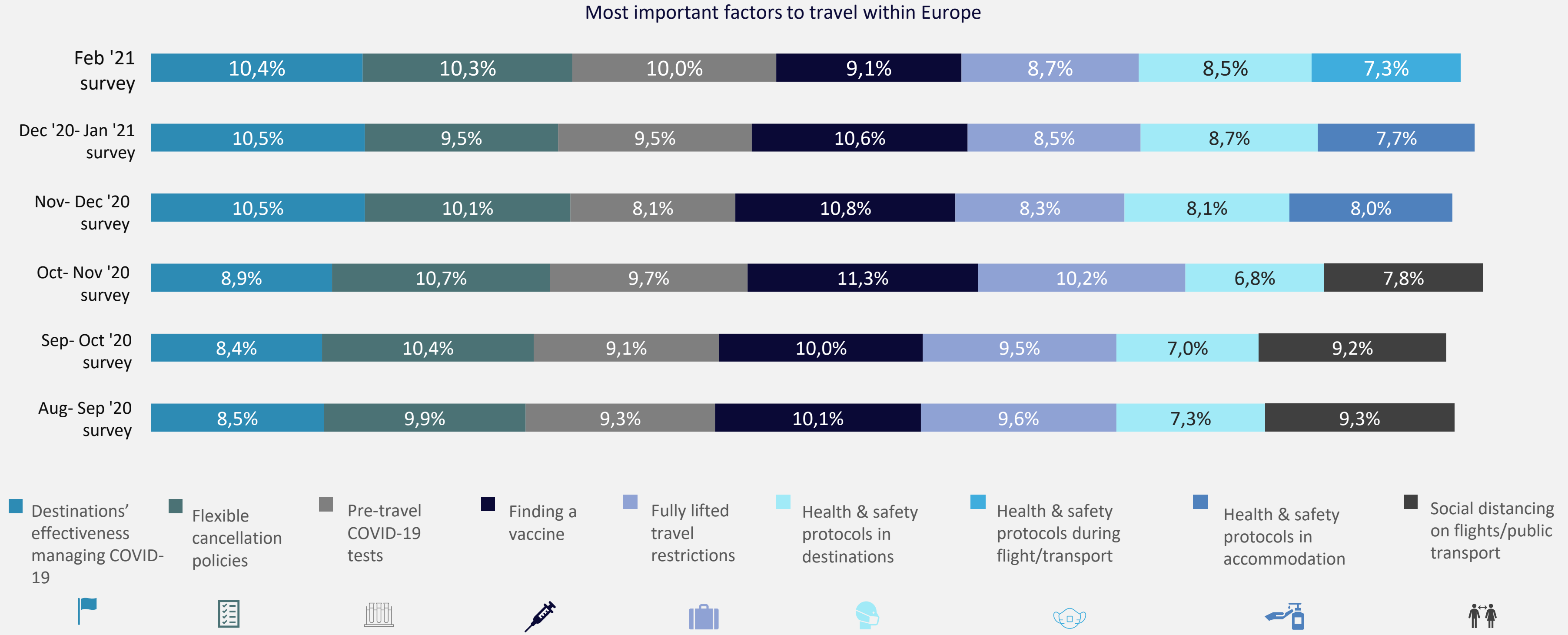
Switzerland 14.6%

Italy 14.5%

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: 5,837

Destination effectiveness in managing COVID-19 and flexibility in cancellation lead trip planning factors; in-transport health and safety protocols a new entry



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

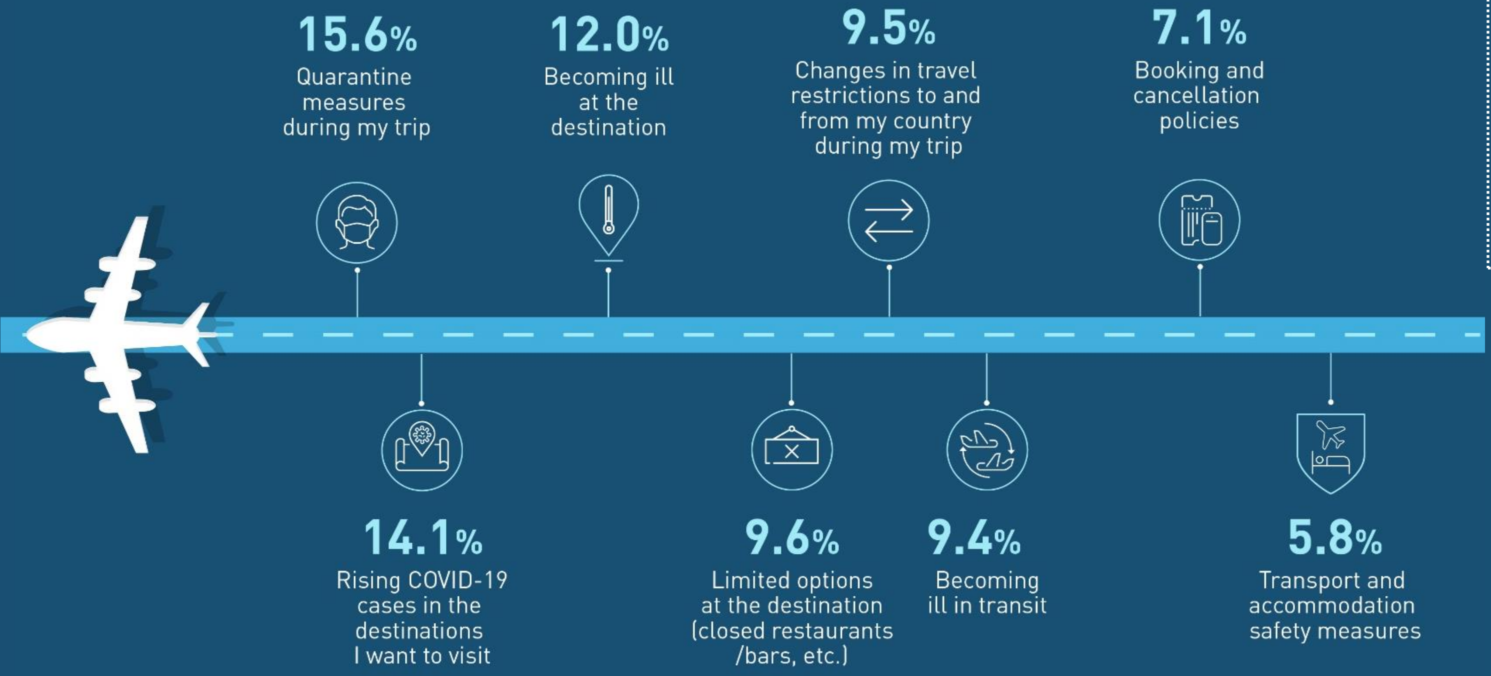
Q3.Which factors are currently most important to you to travel within Europe?

No. of respondents: 5,837

SIZING UP TRAVEL ANXIETIES

Quarantine at the destination remains a major deterrent to European travel

Leading concerns for travelling in Europe



Compared to other age groups, respondents over the age of 55 are slightly more concerned about the rising COVID-19 cases and becoming ill at the destination

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

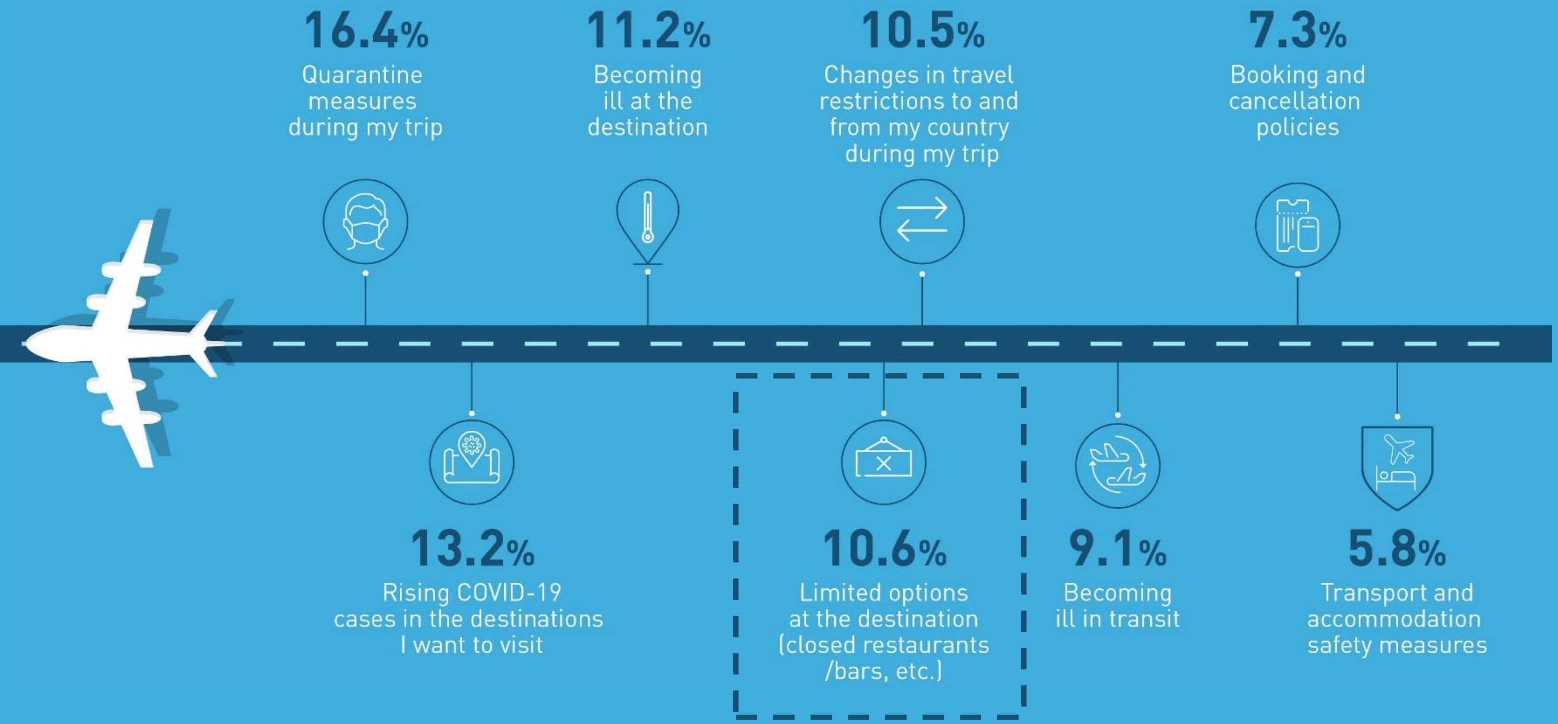
Q4.What currently concerns you the most about travelling within Europe?

No. of respondents: 5,837

TRAVEL CONCERNS OF “EARLY-BIRD” TRAVELLERS

An increasing number of respondents with short-term plans question whether they can get the most out of their in-destination experience

Leading concerns for those who are most likely to travel next

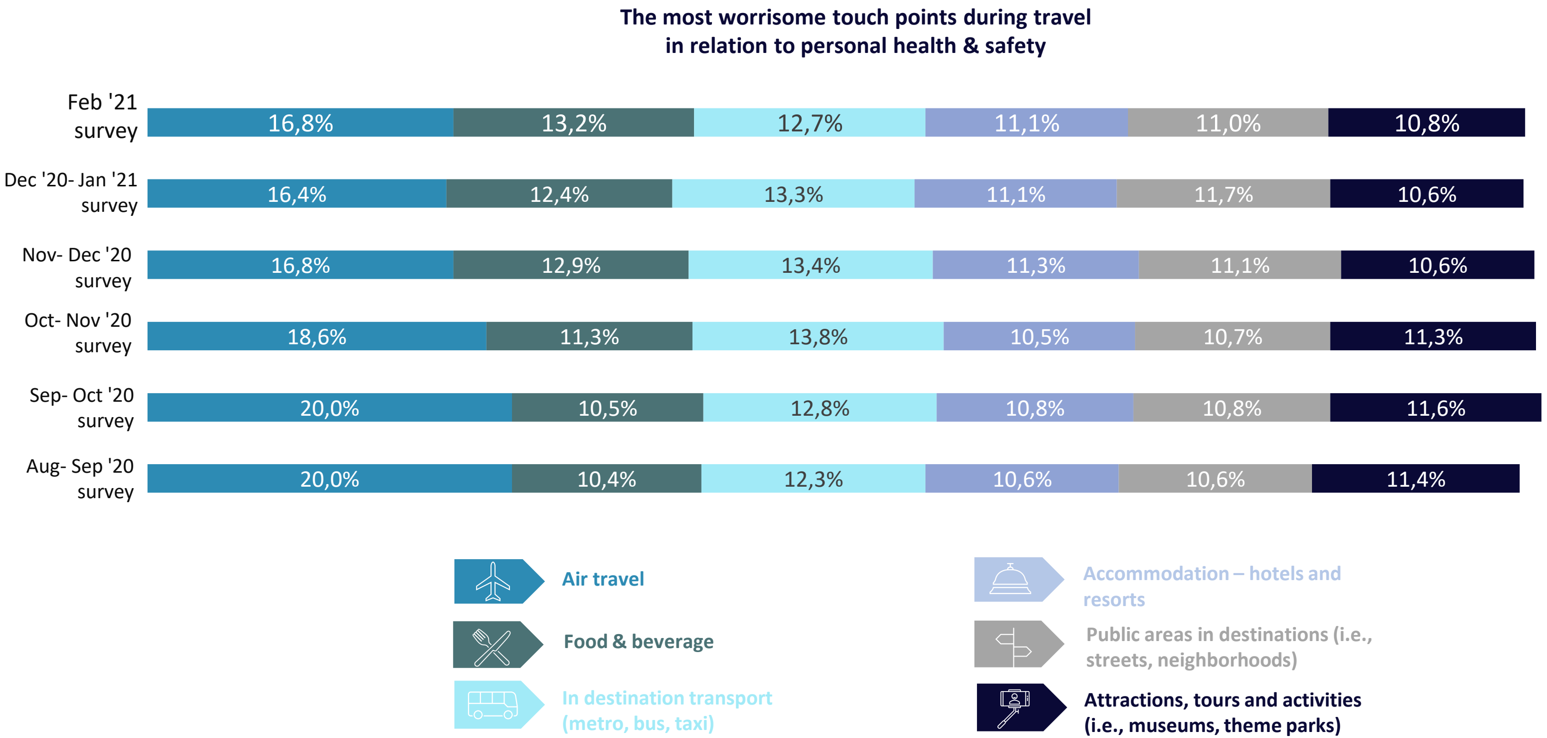


*** No significant changes between waves were recorded for this question.**

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

No. of respondents: 3,246

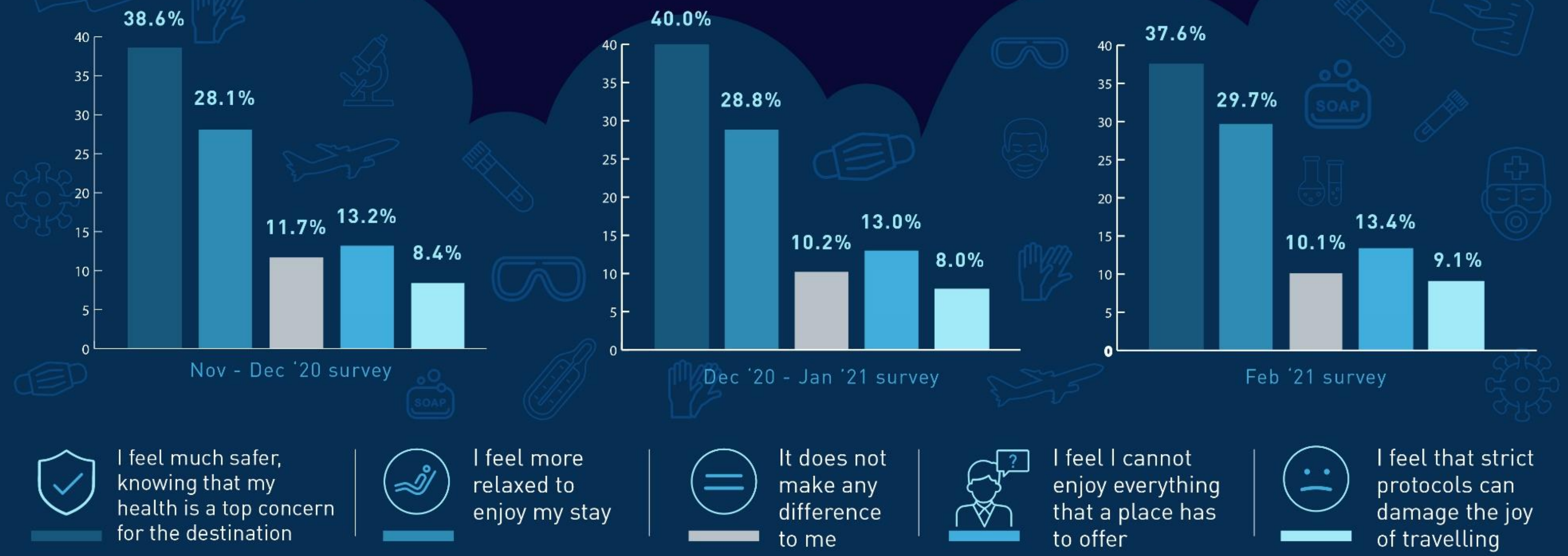
Visiting destination's bars and restaurants is now causing more anxiety among Europeans



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

No. of respondents: 5,837

2 IN 3 TRAVELLERS FEEL MORE REASSURED WHEN TRAVELLING TO PLACES WITH STRICT HEALTH AND SAFETY PROTOCOLS



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 August, n=3,246

THE UNCERTAINTY CONTROL PANEL

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

Aug- Sep '20 survey	Sep- Oct '20 survey	Oct- Nov '20 survey	Nov- Dec '20 survey	Dec '20- Jan '21 survey	Feb '21 survey
9.9%	10.4%	10.7%	10.1%	9.5%	10.3%

10.3% of respondents consider **flexible cancellation policies** as an important factor in travel decision-making

7.1% of respondents position **booking and cancellation policies** as one of the main concerns related to travelling

Aug- Sep '20 survey	Sep- Oct '20 survey	Oct- Nov '20 survey	Nov- Dec '20 survey	Dec '20- Jan '21 survey	Feb '21 survey
8.1%	8.3%	7.8%	7.1%	6.9%	7.1%

30.6% of respondents state that **they do not know when they will travel next**

Aug- Sep '20 survey	Sep- Oct '20 survey	Oct- Nov '20 survey	Nov- Dec '20 survey	Dec '20- Jan '21 survey	Feb '21 survey
32.4%	34.3%	38.8%	36.3%	34.7%	30.6%

Aug- Sep '20 survey	Sep- Oct '20 survey	Oct- Nov '20 survey	Nov- Dec '20 survey	Dec '20- Jan '21 survey	Feb '21 survey
10.4%	11.2%	12.8%	11.1%	10.7%	10.0%

10% 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/ **Wave 6**: 5-19 February 2021; sample= 5,837
  - 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 (8 questions), Travel intentions, preferences and trip planning (10 questions), COVID-19 and responsible travel (3 questions).
- Wave 6: 50% of respondents are male and 50% 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	79	45	74	105	92	56	109	97	149	**894**
	25 - 34	135	120	74	134	142	153	106	113	125	141	**1,243**
	35 - 44	126	146	101	113	155	150	120	120	106	109	**1,246**
	45 - 54	138	180	105	96	161	168	93	78	42	54	**1,115**
	≥55	263	225	175	83	128	187	125	79	27	47	**1,339**
Total		**750**	**750**	**500**	**500**	**691**	**750**	**500**	**499**	**397**	**500**	**5,837**

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: V**ery 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.

This project is co-funded by the European Union

Study on Monitoring Sentiment for Intra-European Travel

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.

Published by the European Travel Commission

Rue du Marché aux Herbes, 61,
1000 Brussels, Belgium
Website: www.etc-corporate.org
Email: info@visiteurope.com

ISBN No: 978-92-95107-47-2
Cover photo : Jacob Lund, ID: 594296522 (Shutterstock)
Design: **MINDHAUS**

Co-funded by
the European Union

EUROPEAN
TRAVEL
COMMISSION