MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 4 / 1/2021

Co-funded by
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EUROPEAN
TRAVEL
COMMISSION

WAVE 4
RESEARCH HIGHLIGHTS

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

- With news for approved COVID-19 vaccines, **Europeans' sentiment towards domestic and intra-regional travel slightly improves**; 52% of respondents intend to travel in the next six months[1], a 5% increase compared to wave 3.
- The share of respondents willing to travel until the end of February 2021 dropped by 21%. However, wave 4 reports **a significant 20% increase in the proportion of Europeans willing to take a trip during April-June 2021.**
- Travel sentiment remains heavily reliant on the updates around the COVID-19 crisis; **46% of Europeans plan to resume their pre-pandemic trip once a vaccine is found.** While 19% of respondents have stopped making travel plans, **50% will change plans to ensure their trip still goes ahead.**

[1] Between December 2020 and June 2021

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RESEARCH HIGHLIGHTS

- Intention for intra-European travel is gradually increasing; **40% of respondents plan to visit another European country** compared to 36% that prefer to travel domestically.
- Considering their next trip, early-bird travellers[1] are still most enthusiastic about **city breaks** (17%), followed closely by enjoying time on the **beach** (16%) and experiencing **culture and heritage** (14%).
- Europeans' **intention to travel by air slightly improves** as 52% of respondents now intend to fly to their next destination compared to 49% of the first research wave.
- **Driving a car (either owned or rented)** to the destination is popular among 37% of respondents with short term travel plans.

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

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RESEARCH HIGHLIGHTS

- **Quarantine measures, rising COVID-19 cases at the destination** and **fear of getting ill at the destination** continue to be major concerns for 15%, 14% and 13% respectively among European early-bird travellers.
- Compared to previous reports, travel purpose; choice of companions; accommodation type; and booking method are all similar: **Leisure is still the primary travel purpose according to 63% of respondents with VFR (21%) in second place**.
- Preference for travelling with a **partner (38%) or family (35%)** remains significantly higher than for **solo trips (13%)** among early-bird travellers.
- The largest share of respondents will **stay at a branded (31%) or independent (24%) hotel and resort.**
- At least **75% of Europeans with short-term travel plans will book online;** 47% through an Online Booking Engine and 28% direct through a hotel or airline website.

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RESEARCH HIGHLIGHTS

- A **COVID-19 vaccine** and **flexible cancellation policies are** still at the head of the list of travel decision-making factors for 11% and 10% of respondents respectively. Due to a spike in cases during the period of the second wave, destinations' effectiveness in managing COVID-19 in general is also important for 10% of Europeans.
- **Strict protocols safeguard the joy of travelling**; 67% of Europeans feel safe and relaxed enough to enjoy their trip when strict health and safety protocols are in place. Only 22% state that strict protocols can spoil – to a greater or lesser extent – the travel experience.

WAVE 4
INSIGHTS ON TRAVELLERS' ONLINE SENTIMENT

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

- While tourism-related social media mentions for the age groups 18-25 and 25-35 were down in November 2020 compared to the same month in 2019, there has been an increase in such mentions among the 55-65 (86%) and the over 65 (136%). These age groups are currently more connected to social media, recalling past trips or looking forward to travelling.
- In November 2020, tourists' satisfaction with the offering of European destinations fell by 11.2% compared to November 2019 and the current level of the **Tourism Product Index[2] is 60.9%.** This may result from the decline in destinations' tourism offer - restaurants, museums and attractions that are now closed.
- The **Hotel Satisfaction Index[2] in November 2020 was 69.2%,** demonstrating 8.4% growth compared to November 2019 and indicating a good level of satisfaction with accommodation in destinations. The factors leading the growth are room service and reception - two services that hotels have enhanced in response to COVID-19.

[1] Benchmark report for major European destinations; November 2020 compared to November 2019 (Mabrian Technologies, December 2020)

[2] Tourist Product/ Hotel Satisfaction Indexes, measure satisfaction levels of visitors to a destination with its offering (culture, gastronomy, sun and sea) & accommodation respectively

For more info on methodology and scoring system please refer to slide 49

WAVE 4

RECOMMENDATIONS FOR DESTINATIONS

- Increased interest in international trips can be interpreted as a preliminary signal for destination marketeers **to slowly return their focus to cross border tourism**, especially eyeing the period of April - June 2021.
- Destinations should **continue investing in and developing strict health and safety (H&S) protocols** to further enhance travellers' confidence and peace of mind as their personal health is a top priority. **Cultural attractions could also be certified for H&S**[1] as audiences interested in these kind of trips, put even more focus on strict protocols.
- Destinations should **incorporate all relevant H&S measures in communication campaigns**, visuals and messaging, aiming to further enhance travellers' confidence.
- Increased social media mentions over the age of 55 indicate the need for social media campaigns focused on culture and heritage while still addressing health and safety concerns.

[1] Certification schemes that set out and verify that fundamental requirements, resources and procedures - adjusted to current epidemiological data and guidance - are always in place in order to evidently support prevention of inflow or spread of COVID-19 at premises. Compliance to scheme requirements is evaluated by independent certification bodies.

WAVE 4

RECOMMENDATIONS FOR BUSINESSES

- For the first time since autumn 2020, uncertainty regarding travelling starts to decline; **businesses should gear up towards tourism recovery, first by defining niche audiences**.
- Furthermore, the increasing interest in trips between April - June 2021 could be leveraged **to support the sale of tourism products** for the upcoming spring and summer seasons (accompanied by flexible cancellation policies).
- Online direct booking is the leading choice among 28% of respondents; **businesses enhancing their digital assets and online reservations systems** will enjoy higher conversion rates and can recover faster. Indicative actions could include: develop social media playbooks, add new content such as testimonials, address technical issues such as website's high bounce rates or introduce marketing automation software that drives personalisation.

CONTENTS

How to read

Wave 4

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

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

2. To present Wave 4 timings in which respondents are most likely to take their next trip,the following time periods should be used as a reference:
   - This month; November – December 2020.
   - In 1-2 months; December 2020 – February 2021.
   - In 3-4 months; February – April 2021.
   - In 5-6 months; April - June 2021.
3. To present data and insights, the following distinct groups have been analysed:
   - Total respondents; 5,742
   - Respondents with short-term travel plans/ most likely to travel in the next 6 months ("early-bird travellers"); 2,992
   - Respondents selecting outbound European destinations; 4,057
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

While COVID-19 vaccines are on rollout, the share of respondents planning to resume travel after a vaccine/treatment is found remains close to 46%

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

Spain
58.8% ▼ 8%

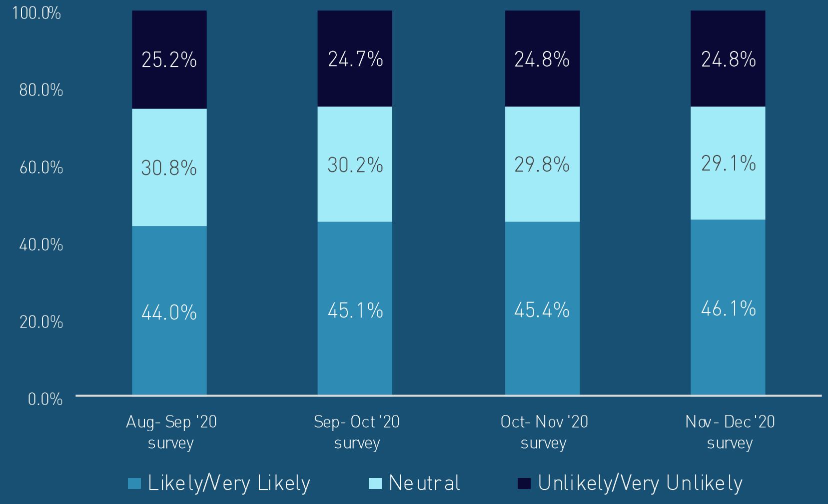
UK
49.6% ▲ 11%

Poland
58.4%

Germany
46.0% ▲ 9%

Italy
53.9%

Intention to re-schedule a pre COVID-19 trip immediately after a treatment/ vaccine is found



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"

No. of respondents: 5,742

The share of respondents planning to travel in the coming 6 months increases by 5% compared to wave 3, providing a positive outlook for spring and summer 2021

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

Poland
74.1% ▲ 9%

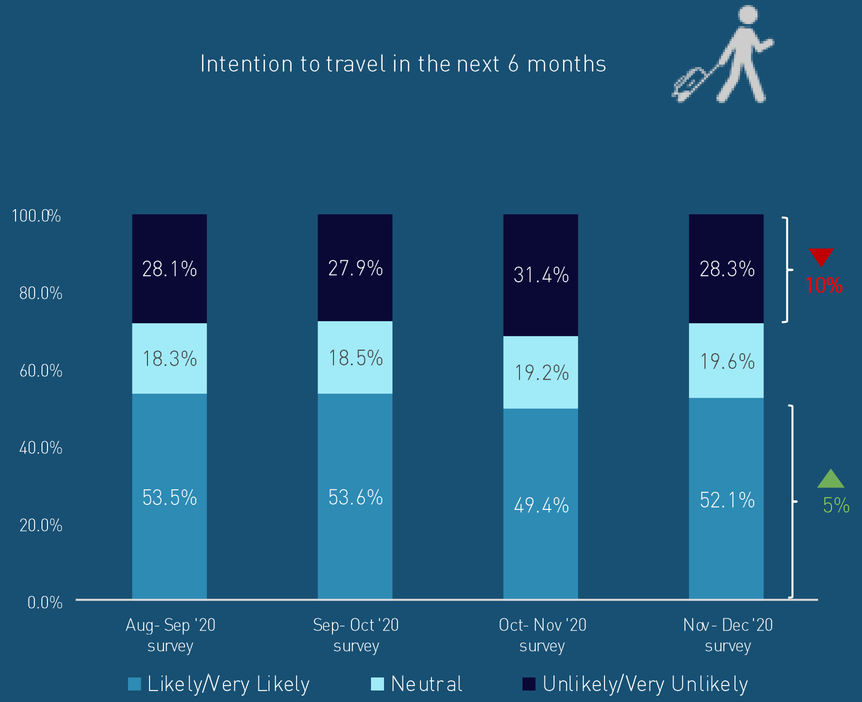
Austria
51.6%

Italy
53.6% ▲ 13%

Spain
50.6%

France
52.8%

Intention to travel in the next 6 months



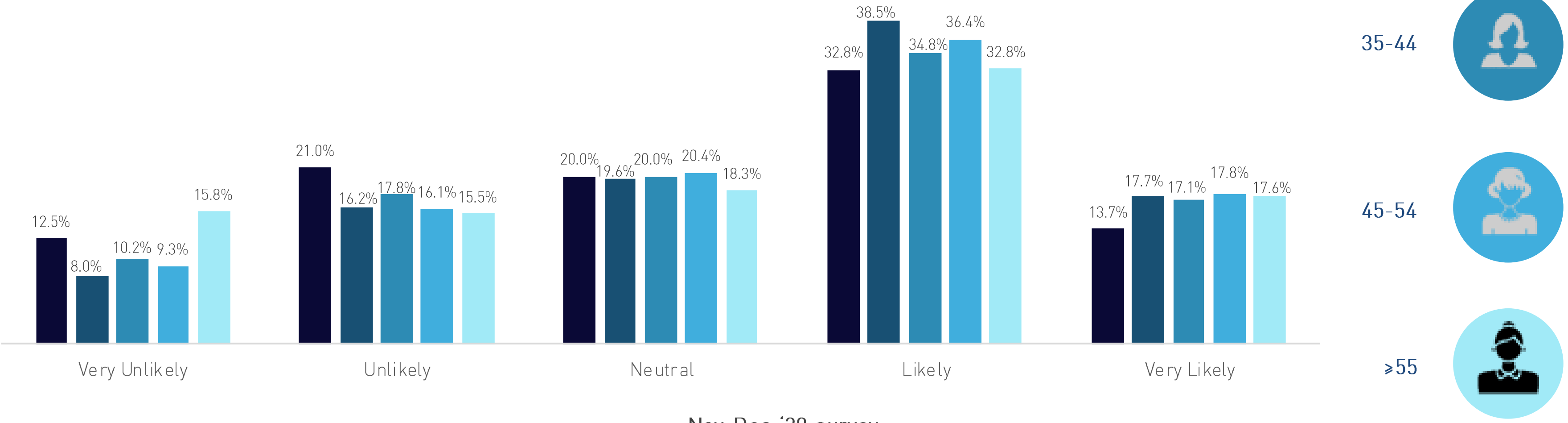
Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 5,742

Respondents aged 25-34 are currently the most eager to take a trip, while Gen Z respondents (aged 18-24) remain less likely to travel

45% of respondents aged 55 and above **do not know yet when they will travel next** compared to an average of 34% among the other age groups

Intention to travel in the next 6 months by age group

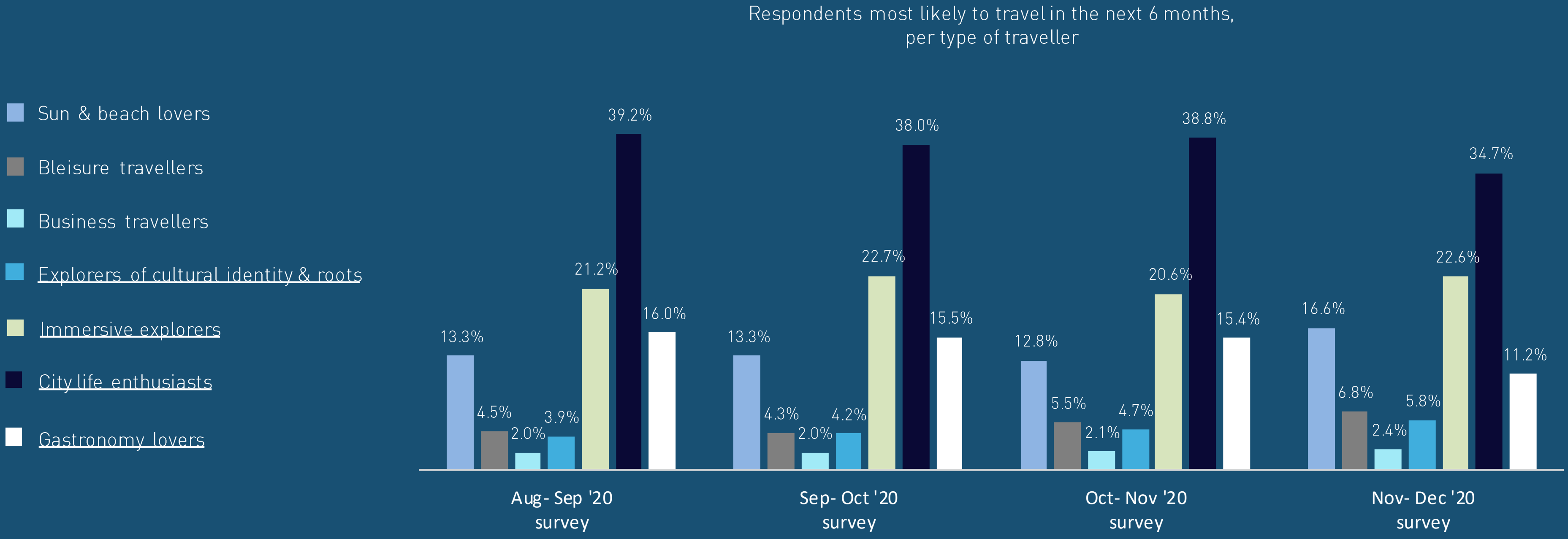


Nov-Dec ‘20 survey

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: 5,742

Desire for travel remains consistent among different types of travellers, with those interested in city trips keenest to take a trip soon

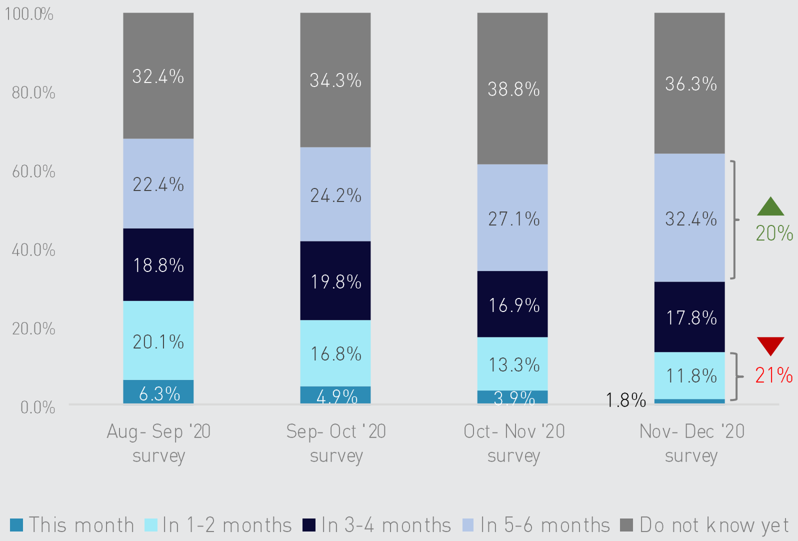


Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

No. of respondents: 2,992

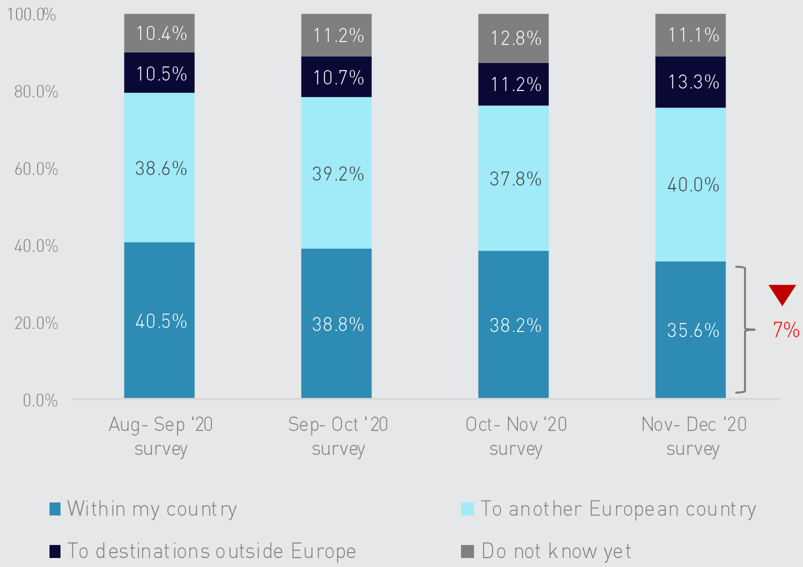
The survey shows a 20% increase in the share of respondents intending to take a trip during April-June 2021

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: 5,742

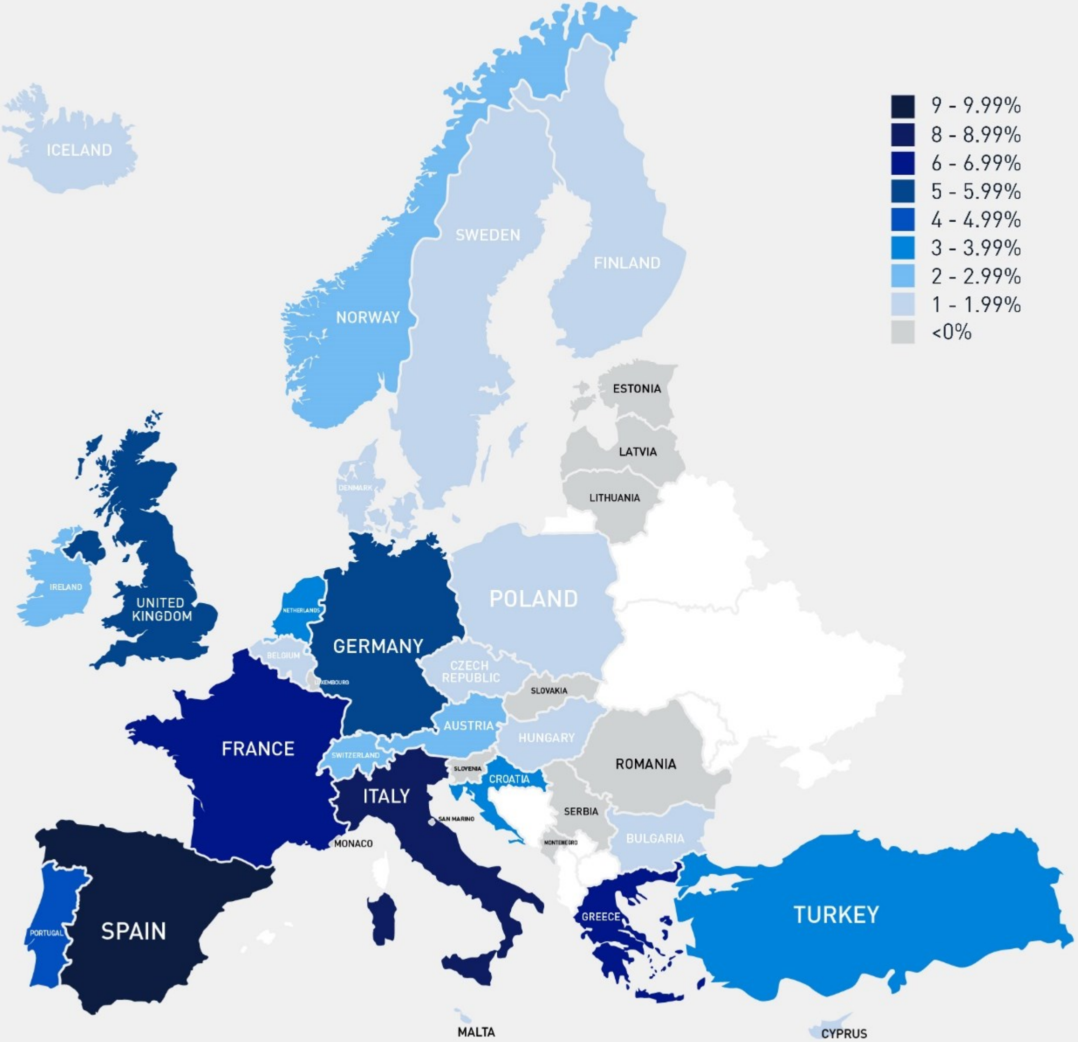
PREFERRED COUNTRIES FOR THE NEXT INTRA-EUROPEAN TRAVEL

Spain is further positioned as Europe's most preferred destination; Turkey is a new entrant in the top 10 countries

TOP 10 COUNTRIES

Spain	9.8%
Italy	8.2%
France	6.3%
Greece	6.1%
Germany	5.4%
United Kingdom	5.2%
Portugal	4.9%
Netherlands	3.3%
Turkey	3.3%
Croatia	3.1%

Please use this map as a reference only



* No significant changes between waves were recorded for this question

No. of respondents: 4,057

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

Europeans still putting leisure as the first reason to travel, with visiting friends and relatives in second

Top 3 markets to resume leisure travel

Italy
69.2%

UK
68.1%

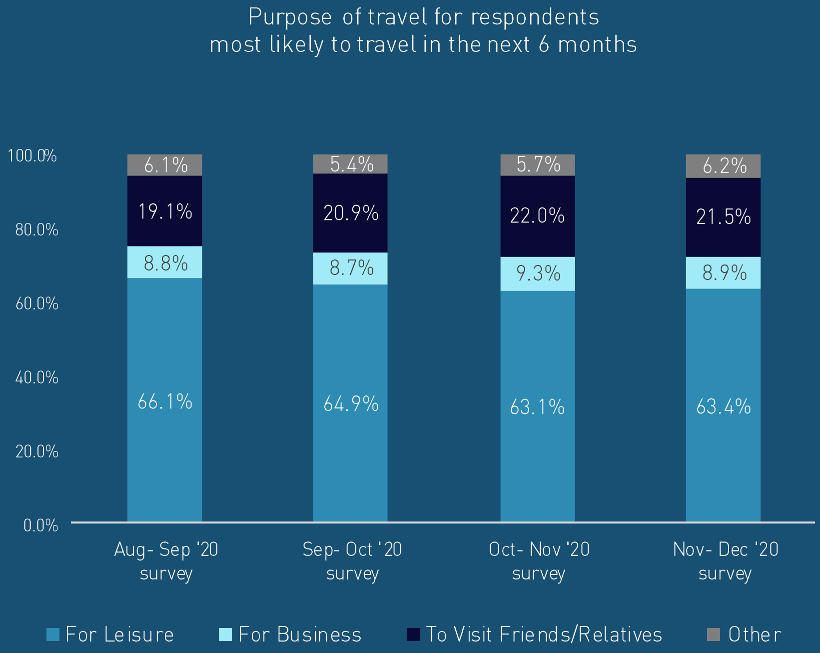
France
67.9%

Top 3 markets to resume business travel

Switzerland ▲ 48%*
15.7%

Germany
12.6%

Spain
12.6%



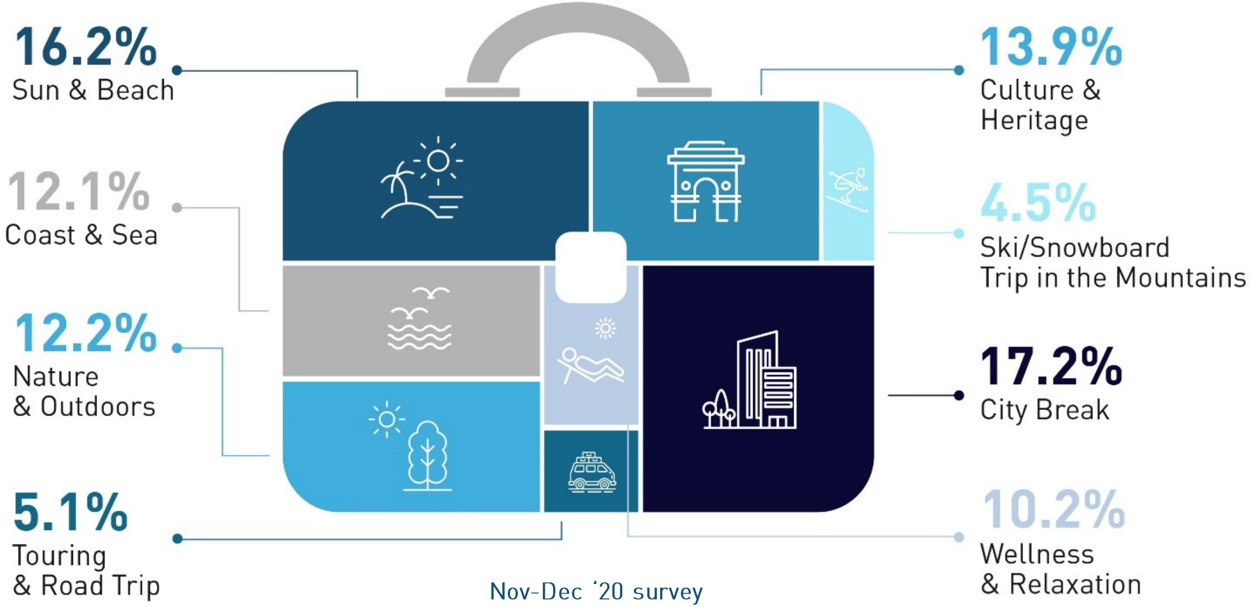
No. of respondents: 2,992

* Please use for reference only due to the low number of respondents (n: 21)

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

Visiting cities and spending time on the beach continue to dominate Europeans' travel plans

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



Nov-Dec '20 survey

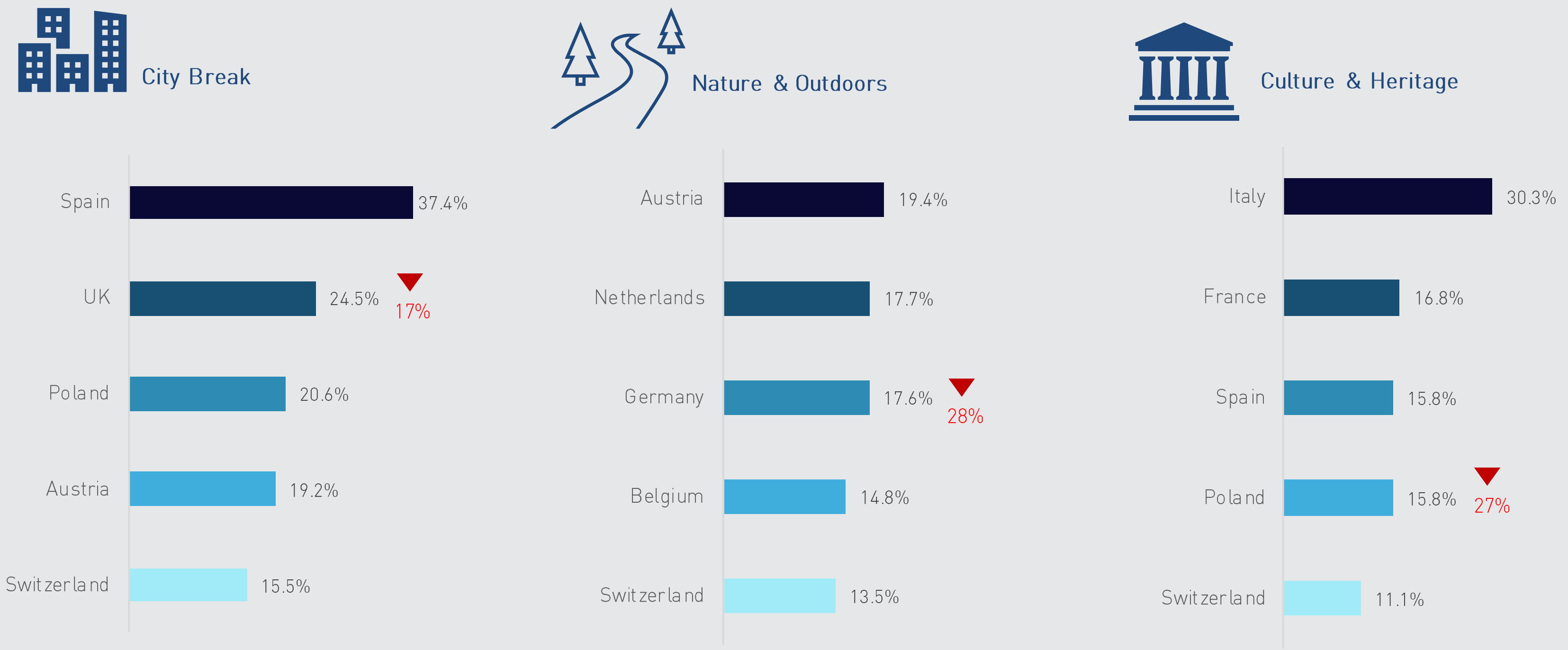
42% of respondents planning a sun & beach trip will travel with their families, while the largest fragment (38%) of city- trip enthusiasts would choose their partners as a travel companion

* 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: 2,992

Places with a city break or cultural offering could more easily attract Spaniards and Italians respectively; while destinations offering outdoor & nature experiences could be more appealing to central European and Benelux markets

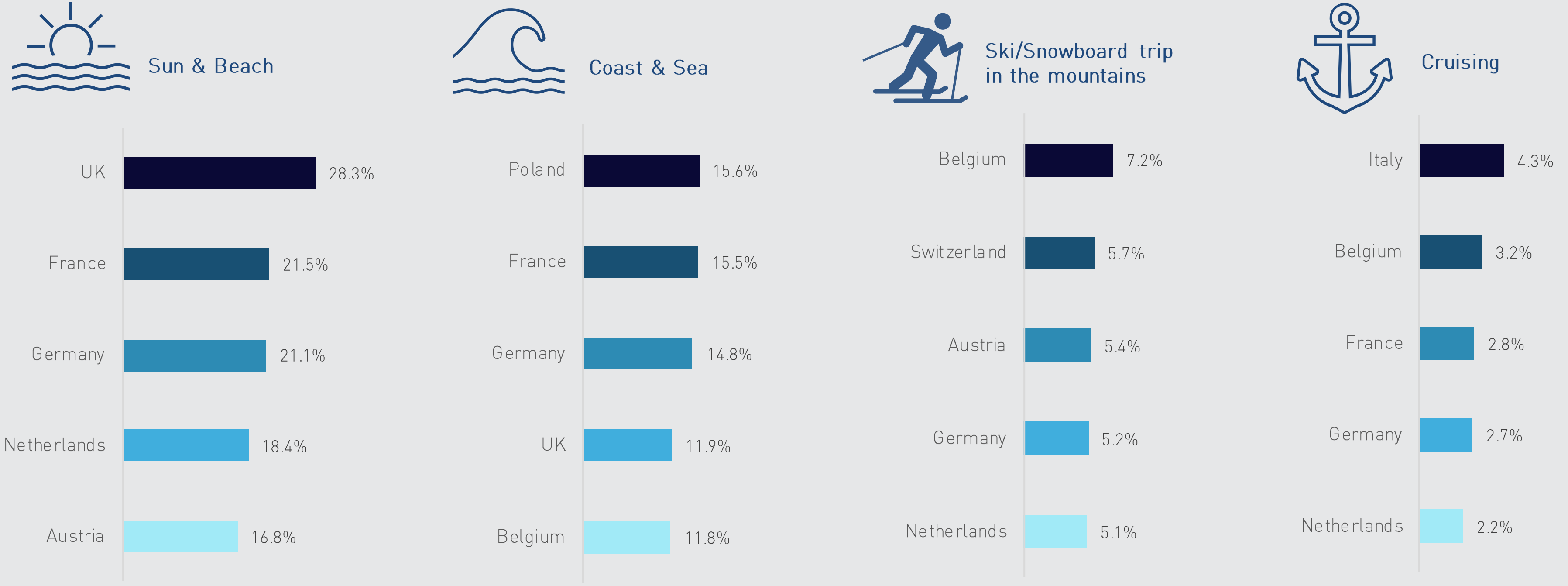


How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 37.4% of respondents from Spain are most likely to undertake a city break trip

No. of respondents: 5,742

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

The largest European travel markets show a strong all year-round interest for sun and beach holidays as well as vacations on the coast and sea



* No significant changes between waves were recorded for these types of travel

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

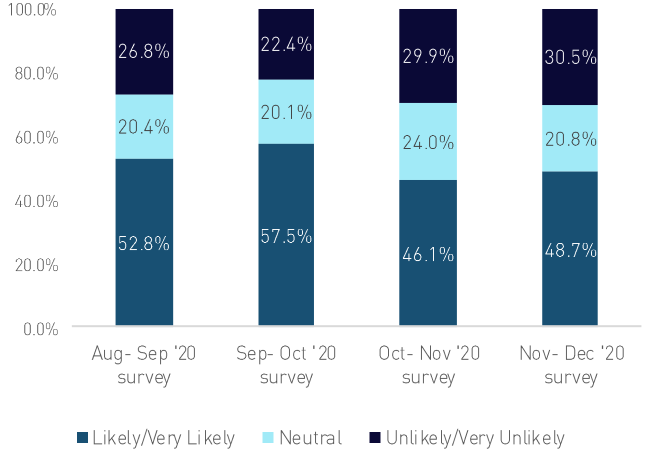
How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 28.3% of respondents from UK are most likely to undertake a sun and beach trip

No. of respondents: 5,742

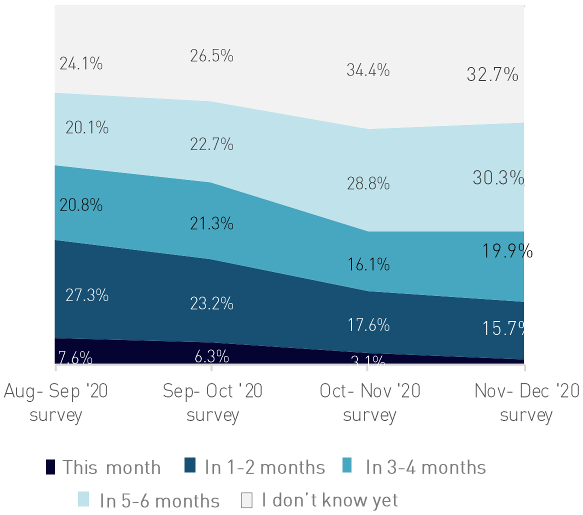
GERMANY

Almost 50% of Germans intend to take a trip by June 2021, with signs of renewed interest in international travel

Willingness to travel in the next 6 months

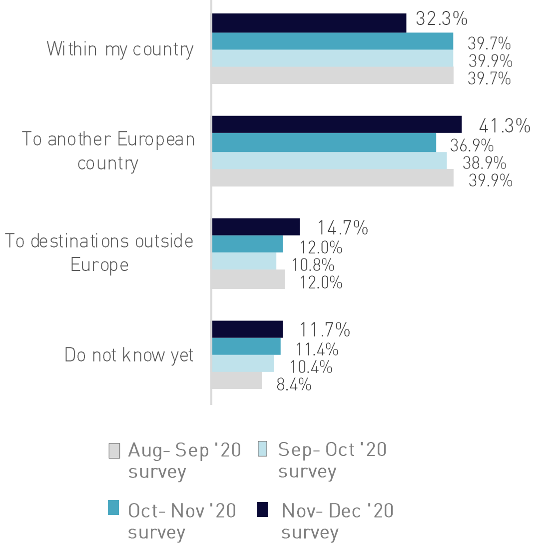


When will Germans travel?



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?

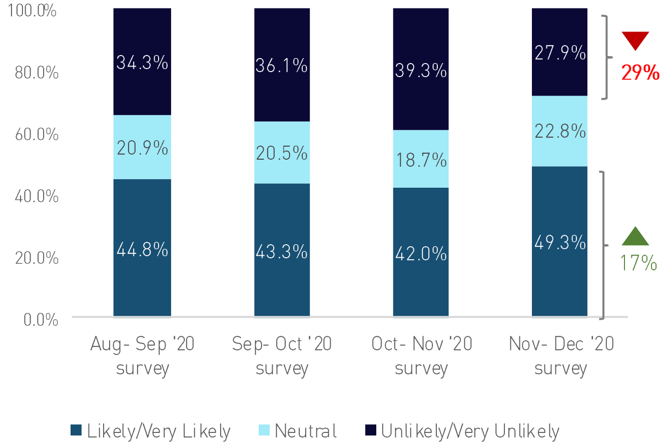
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 750

UNITED KINGDOM

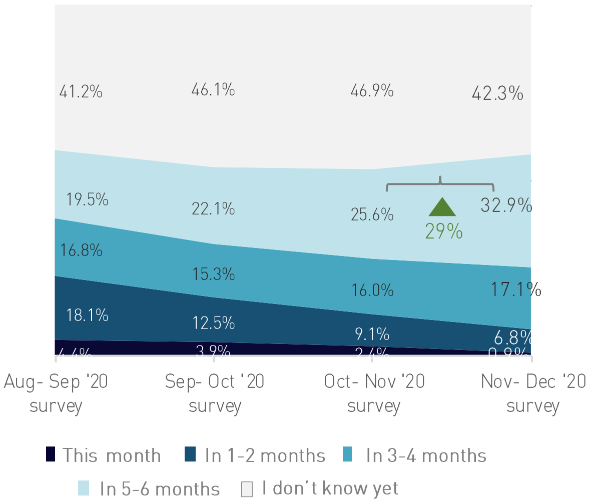
Britons are now eyeing a trip during mid spring – early summer 2021 as doses of COVID-19 vaccines are secured

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?



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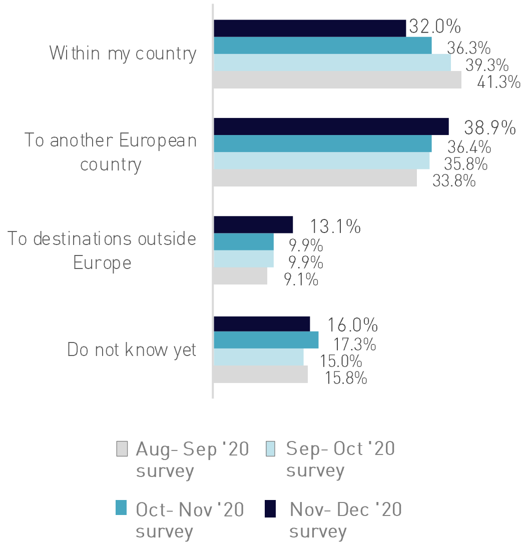
Q9.When are you most likely to go on your next trip either in your country or within Europe?

Where will Britons travel within the next 6 months?



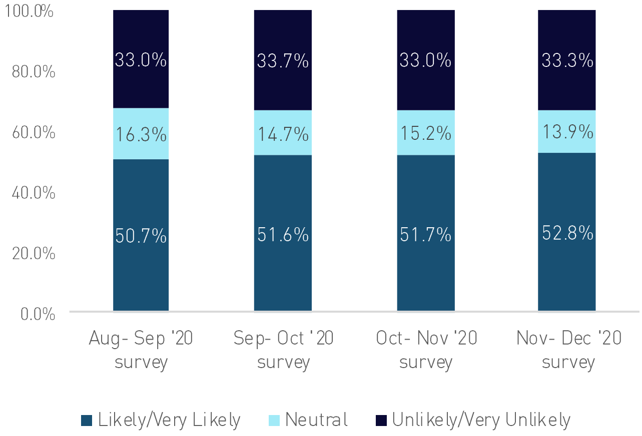
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 750

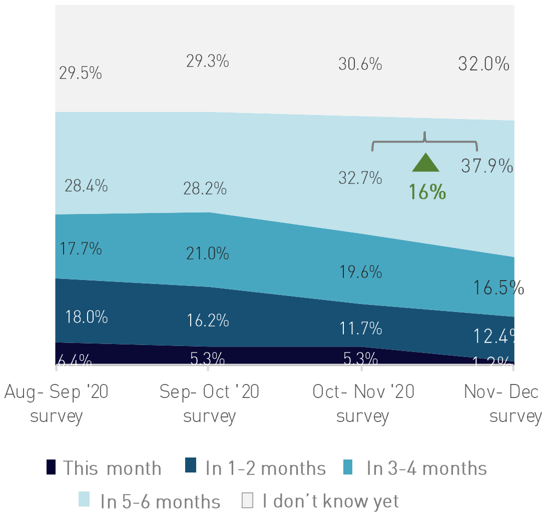
FRANCE

A positive attitude to travel continues a steady rise among the French, with a larger share of respondents (38%) planning trips for April – June 2021

Willingness to travel in the next 6 months

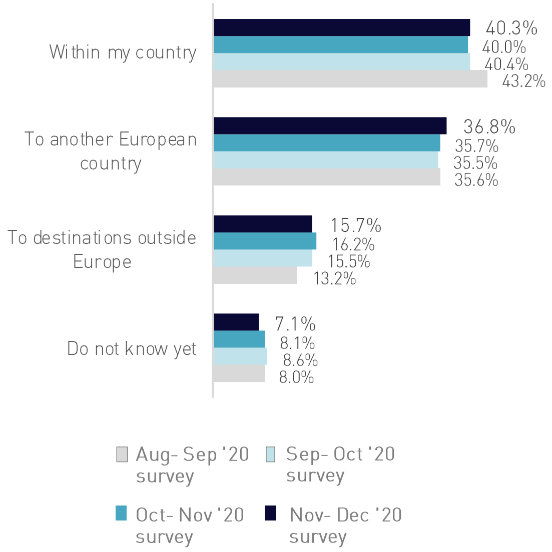


When will French travel?



For specific dates please refer to slide 10

Where will French travel within the next 6 months?



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

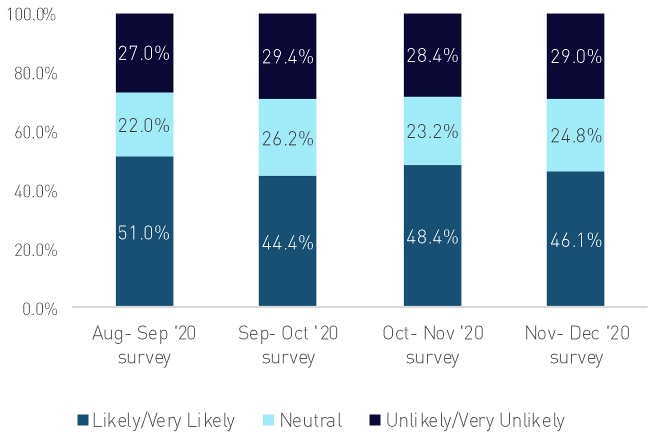
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 750

NETHERLANDS

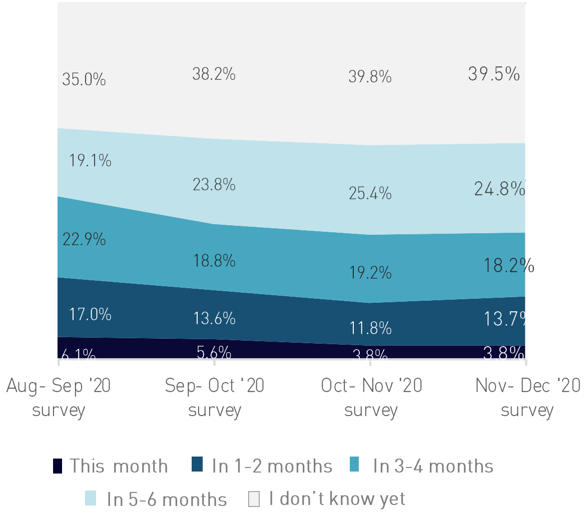
Desire for travel within Europe has weakened while 39.5% of Dutch are uncertain about the exact timing of their next trip, compared to a 36% European average

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?



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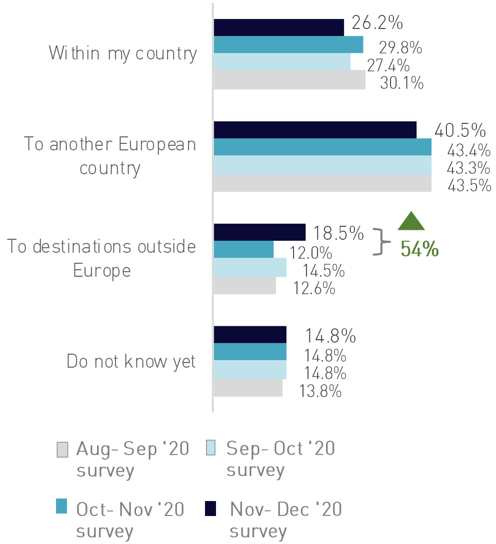
Q9.When are you most likely to go on your next trip either in your country or within Europe?

Where will Dutch travel within the next 6 months?



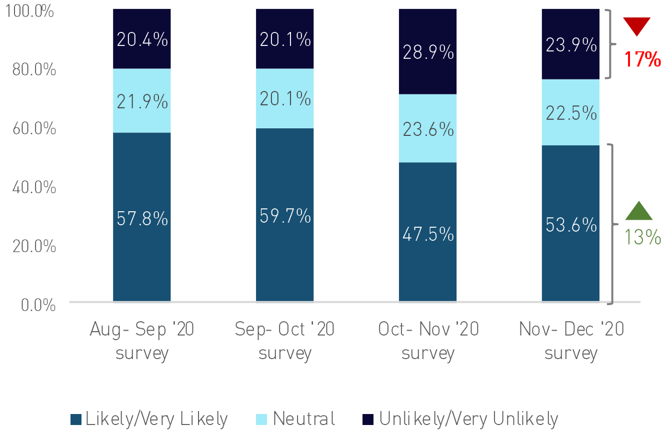
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 451

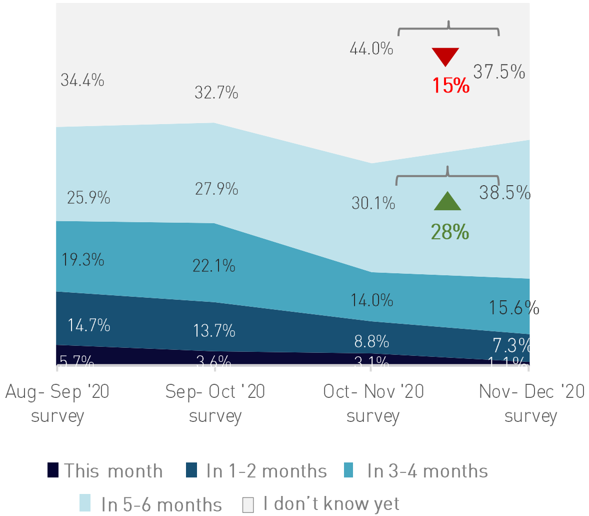
ITALY

Gearing up for travelling, Italians make the second quarter of 2021 their main target period

Willingness to travel in the next 6 months

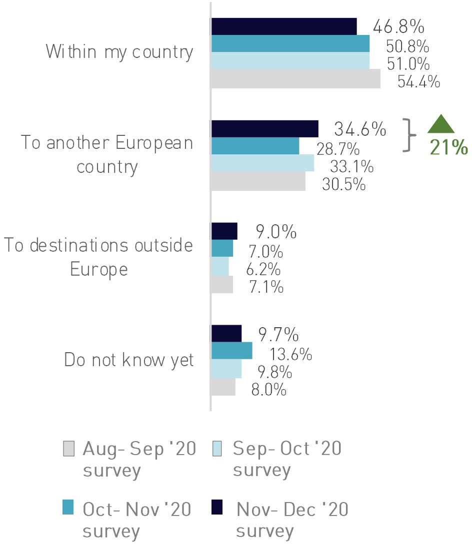


When will Italians travel?



For specific dates please refer to slide 10

Where will Italians travel within the next 6 months?



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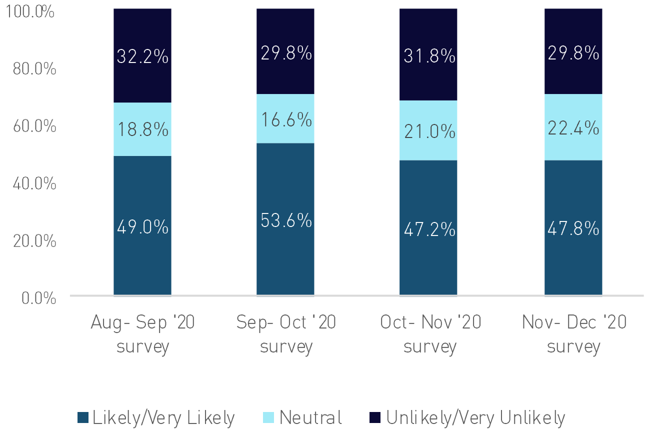
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 750

BELGIUM

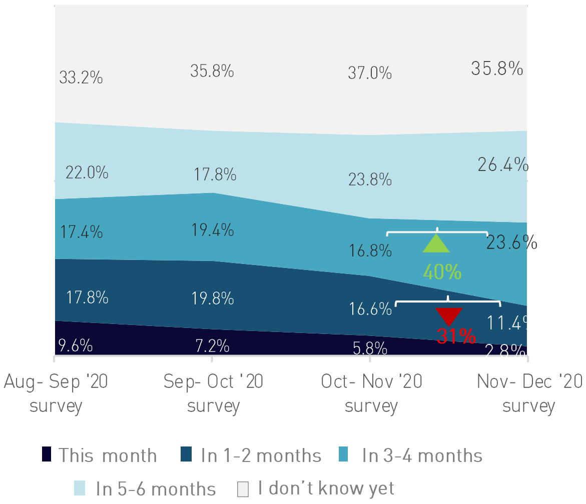
Belgian interest in taking a trip during late winter – early spring 2021 surges by 40% with desire for intra-European travel also on the rise

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?

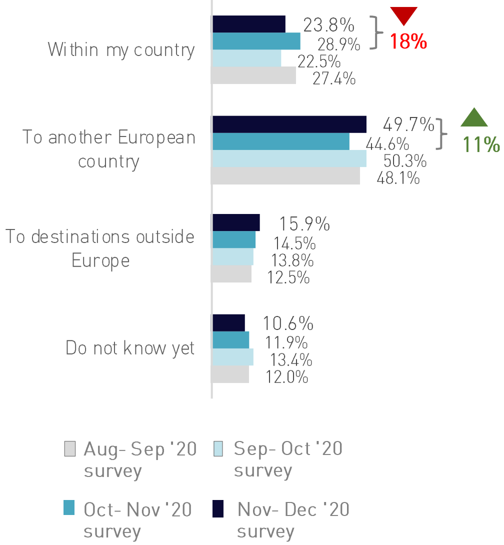
When will Belgians travel?



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 Belgians travel within the next 6 months?



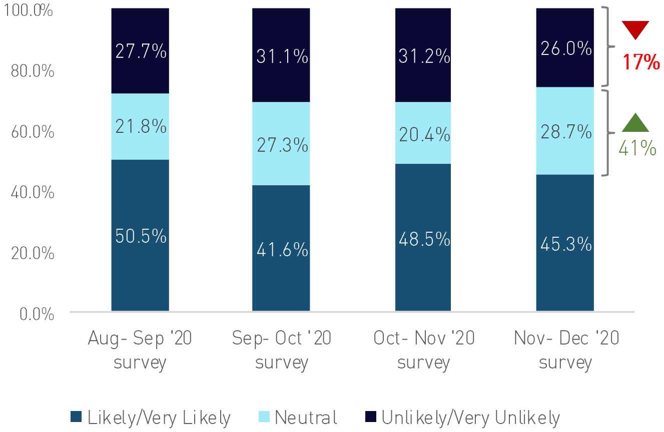
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 500

SWITZERLAND

Confident about travel in the next 6 months, the Swiss also express an increasing willingness to take a trip during spring 2021

Willingness to travel in the next 6 months



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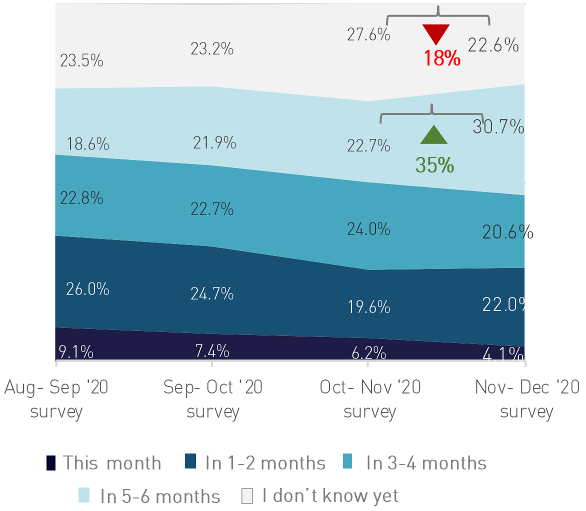
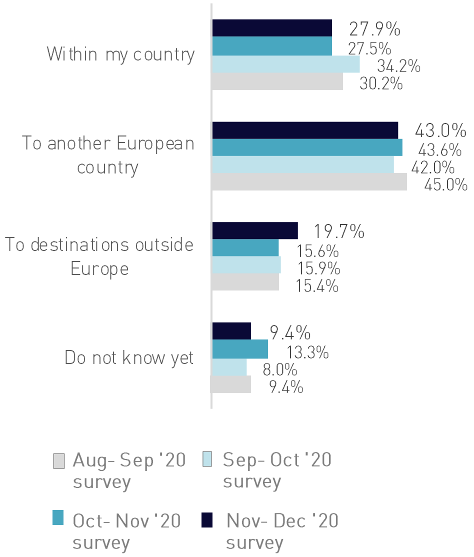
When will Swiss travel?



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?



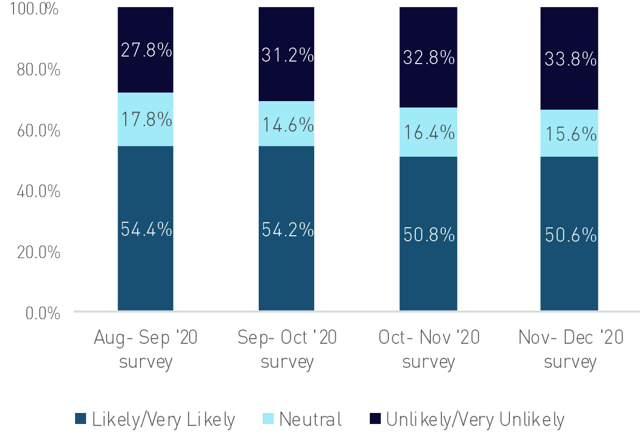
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 296

SPAIN

Spaniards are now the most uncertain market regarding the exact timing of their next trip - 45% of respondents compared to the European average of 36%

Willingness to travel in the next 6 months



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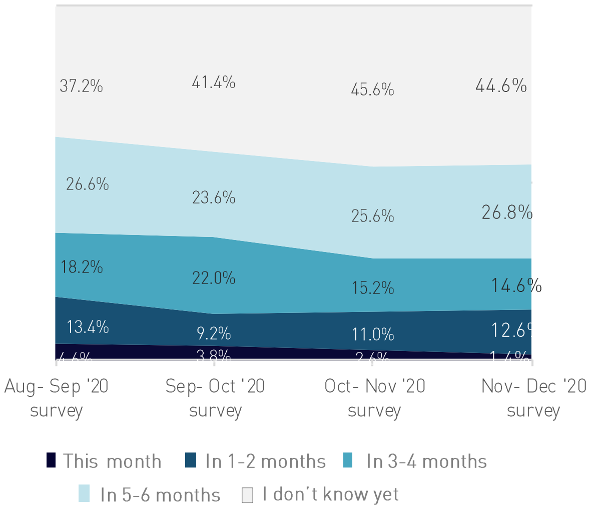
When will Spaniards travel?



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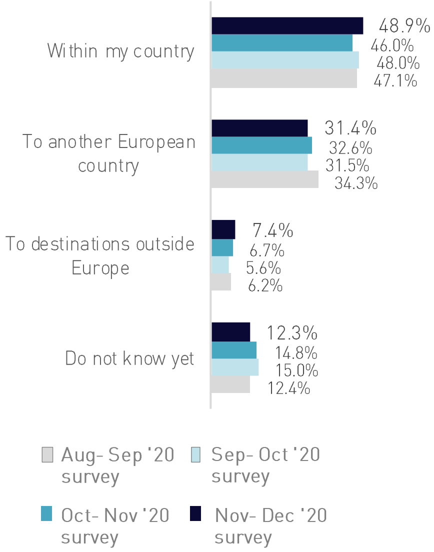
Q9.When are you most likely to go on your next trip either in your country or within Europe?

Where will Spaniards travel within the next 6 months?

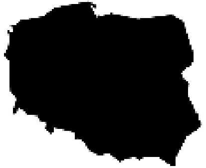


Q10.Where do you plan to travel in the next 6 months?

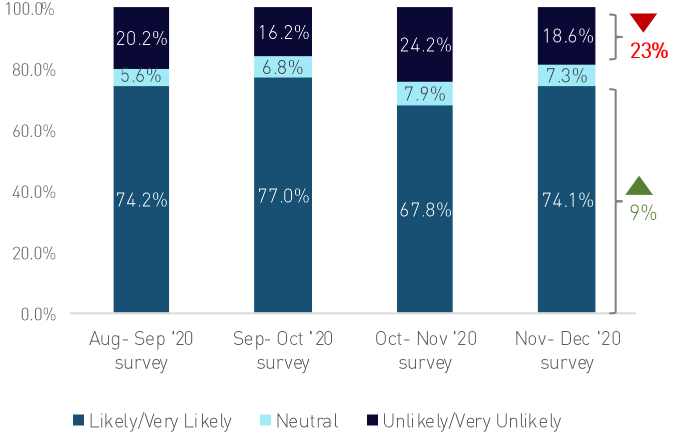
No. of respondents: 500

POLAND

3 out of 4 Poles plan to travel in the coming 6 months, with a 20% rise among those keen to take a trip during April-June 2021

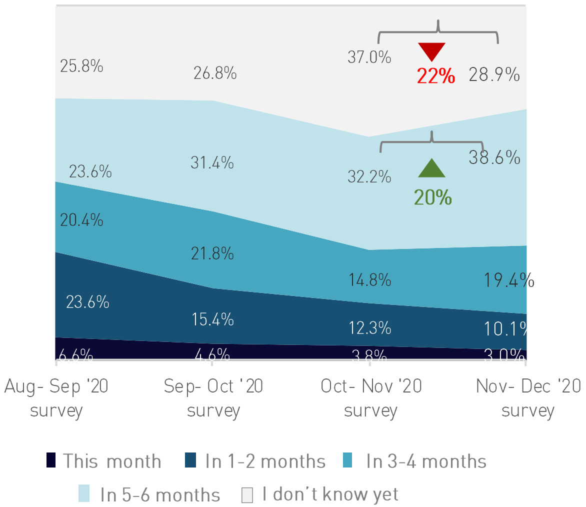


Willingness to travel in the next 6 months



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

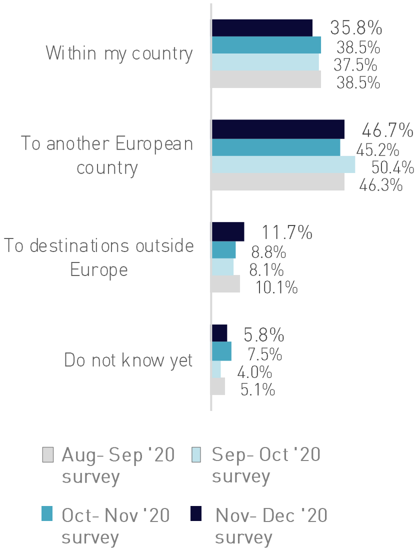
When will Poles travel?



For specific dates please refer to slide 10

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?



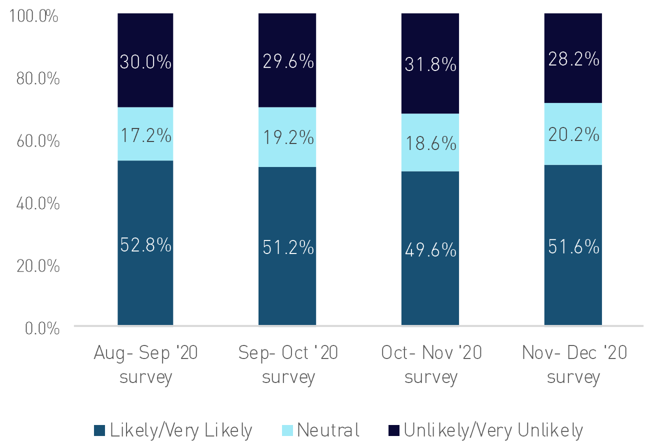
Q10.Where do you plan to travel in the next 6 months?

No. of respondents: 495

AUSTRIA

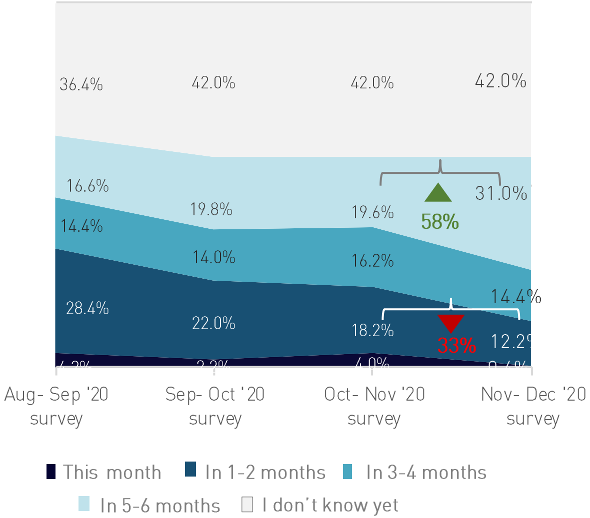
Willingness to travel remains consistent over time among Austrians, with the second quarter of 2021 being much more popular for resuming trips

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?

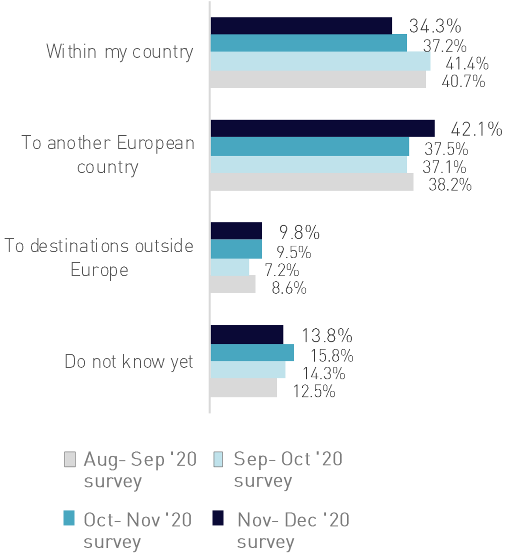
When will Austrians travel?



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?

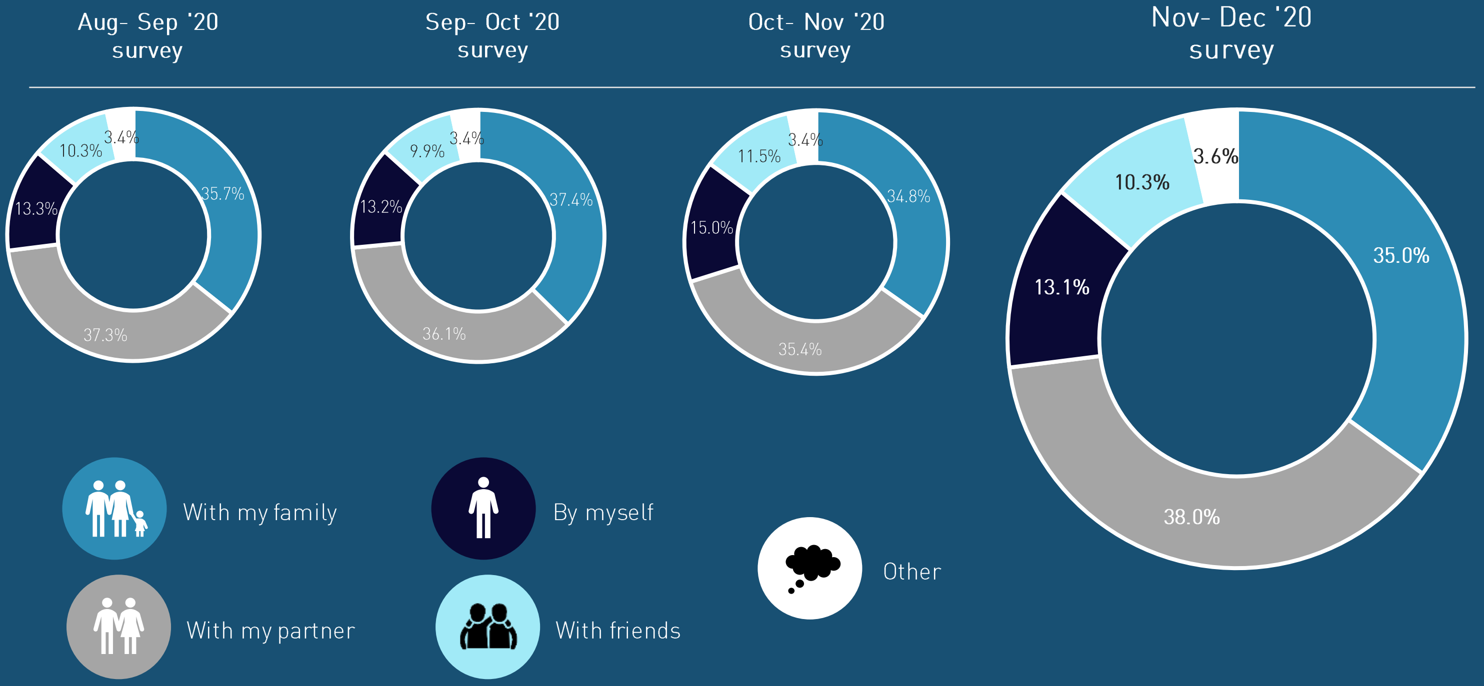
No. of respondents: 500

TRIP PLANNING

02

Taking a partner or family on the next trip is still finding favour among over 70% of European early-bird travellers

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



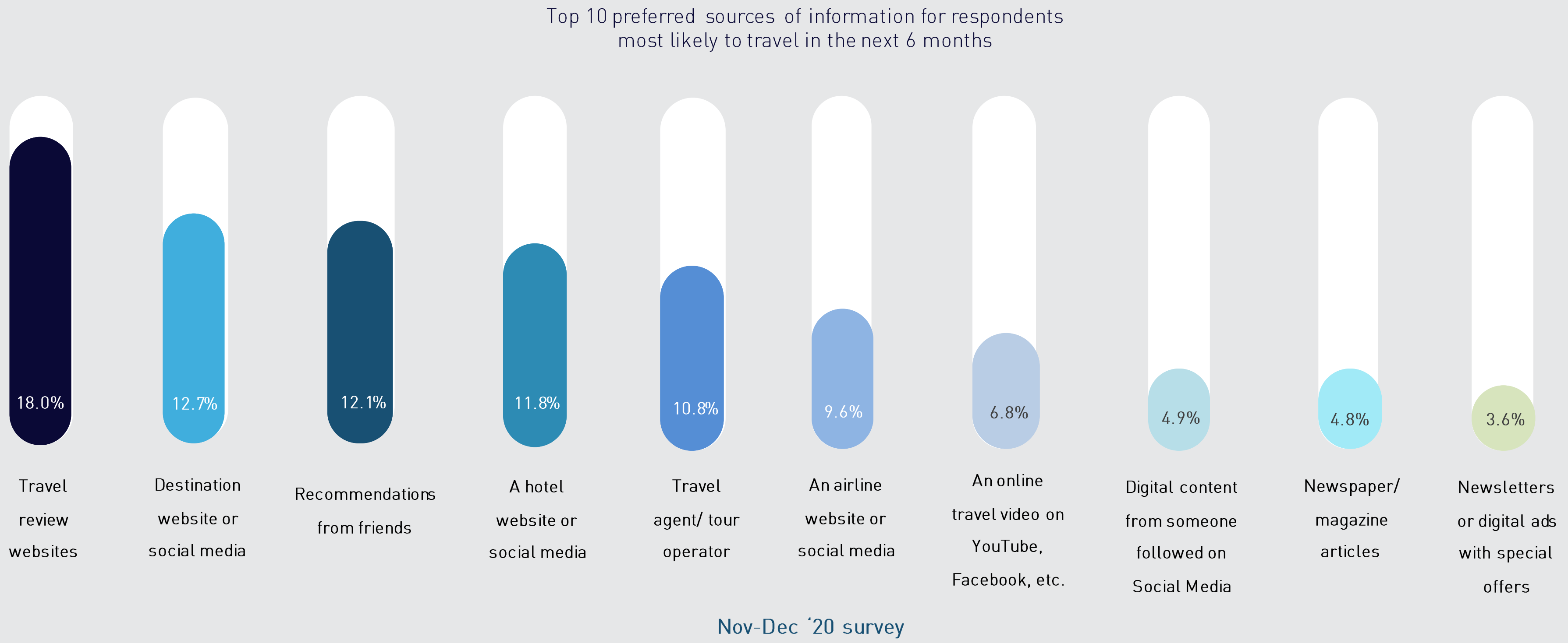
Irrespective of respondents' choices regarding travel companion - partner, family or solo - their trip-related anxieties (as listed in slide 42) remain similar

* 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: 2,992

Travel planning sources show little variation over the entire research period; 2 in 3 respondents intend to plan their next trip online



* 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: 2,992

3 out of 4 Europeans are likely to book their next trip online, maintaining a positive sentiment towards digital travel platforms

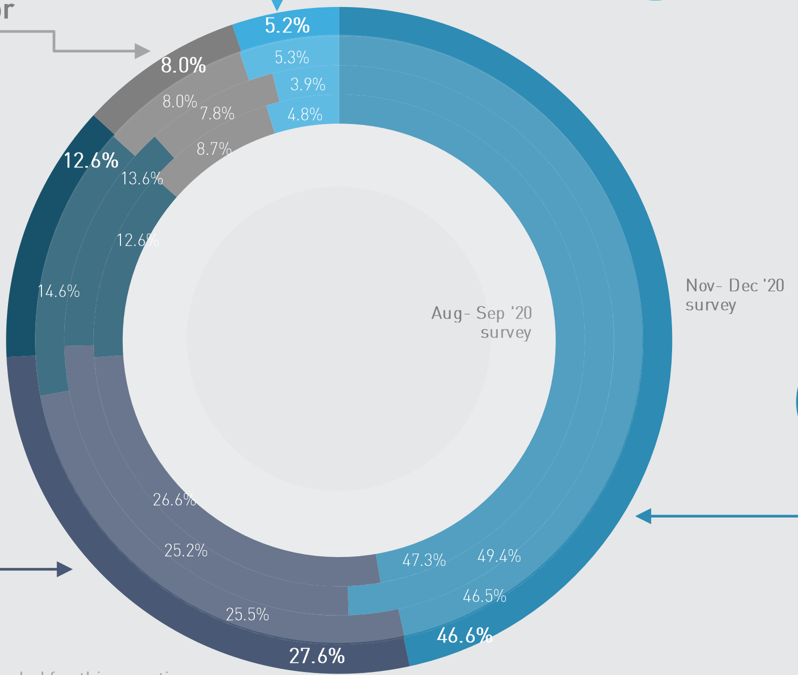
8.0%
Package holiday through a Tour Operator

5.2%
Corporate travel office

12.6%
Travel agent/ travel designer

27.6%
Direct booking via accommodation/ airline website

46.6%
Online booking engine



Respondents travelling with their own car are more likely to book accommodation directly (32%) from the hotels website and are slightly less likely to rely on a travel agent (11%)

* 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: 2,992

Europeans' intention to travel by air continues a steady rise from autumn 2020, while driving is the second most popular choice

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

Spain
67.2%

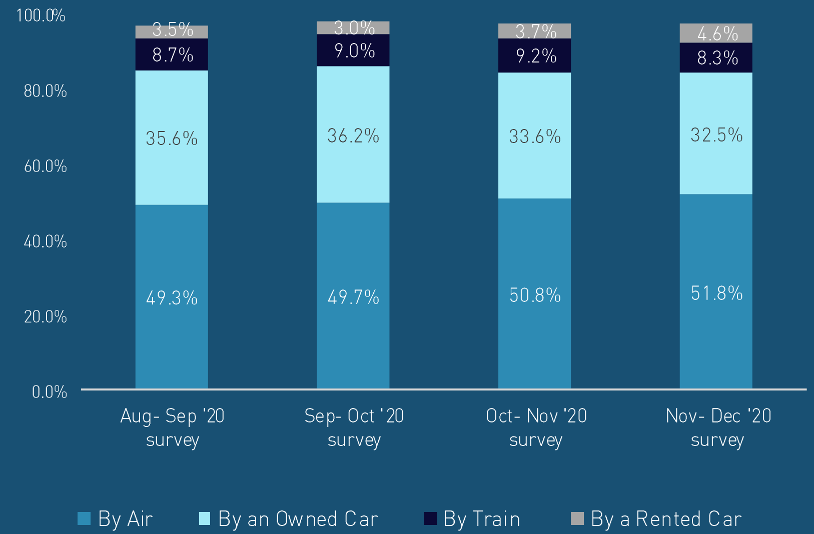
France
61.1%

UK
63.2% ▼10%

Poland
50.1%

Italy
62.7%

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



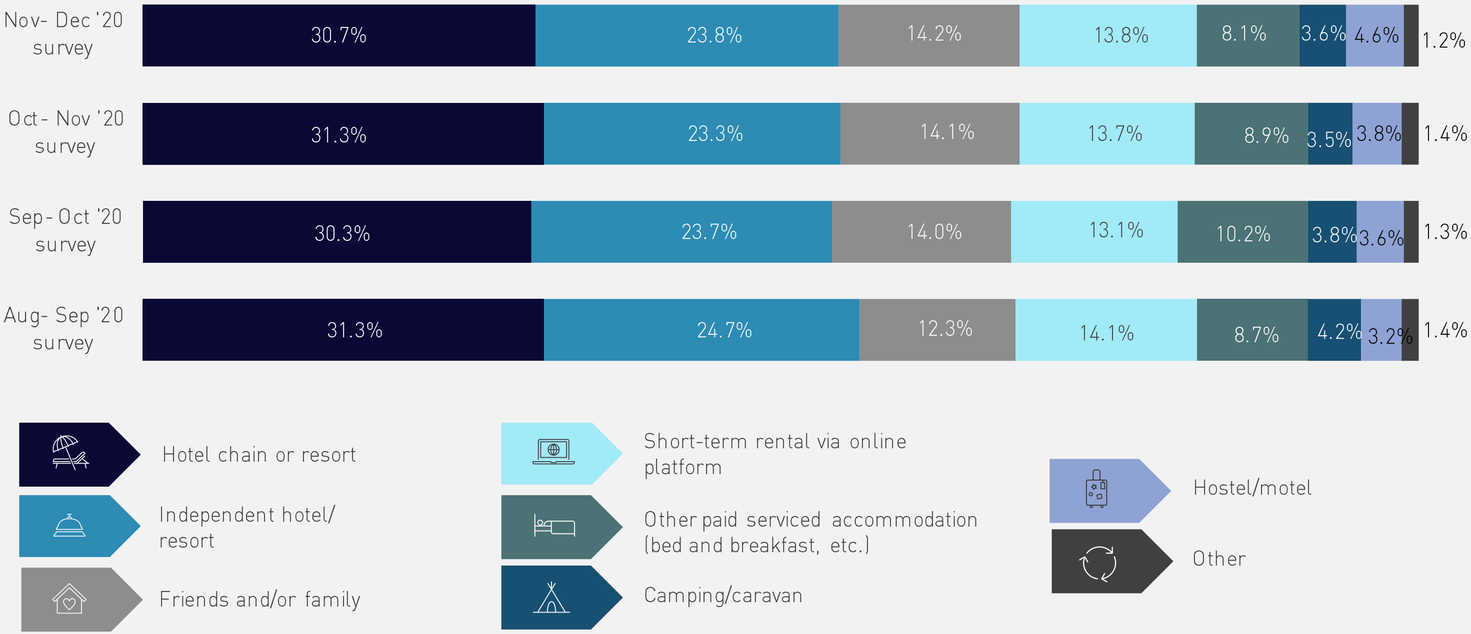
Q14.Which of the following modes of transport would you most consider using during your next trip within Europe?

*According to IATA's report for Europe, December 2020

No. of respondents: 2,992

Breakdown of accommodation choices remains largely unchanged, with chain hotels and resorts still being the most favoured

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



Respondents staying in short-term rentals care more about **affordability, authenticity and sustainability**, compared to respondents staying at hotels and resorts

* 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: 2,992

Health and safety considerations are by far the most important travel quality, consistent with all previous research waves

Nov-Dec '20 survey

TOP 6 QUALITIES

- **22.5%** Health & Safety
- **14.6%** Relaxation & Peace of mind
- **10.3%** Affordability
- **8.5%** Comfort
- **5.9%** Discovery
- **5.5%** Privacy

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?

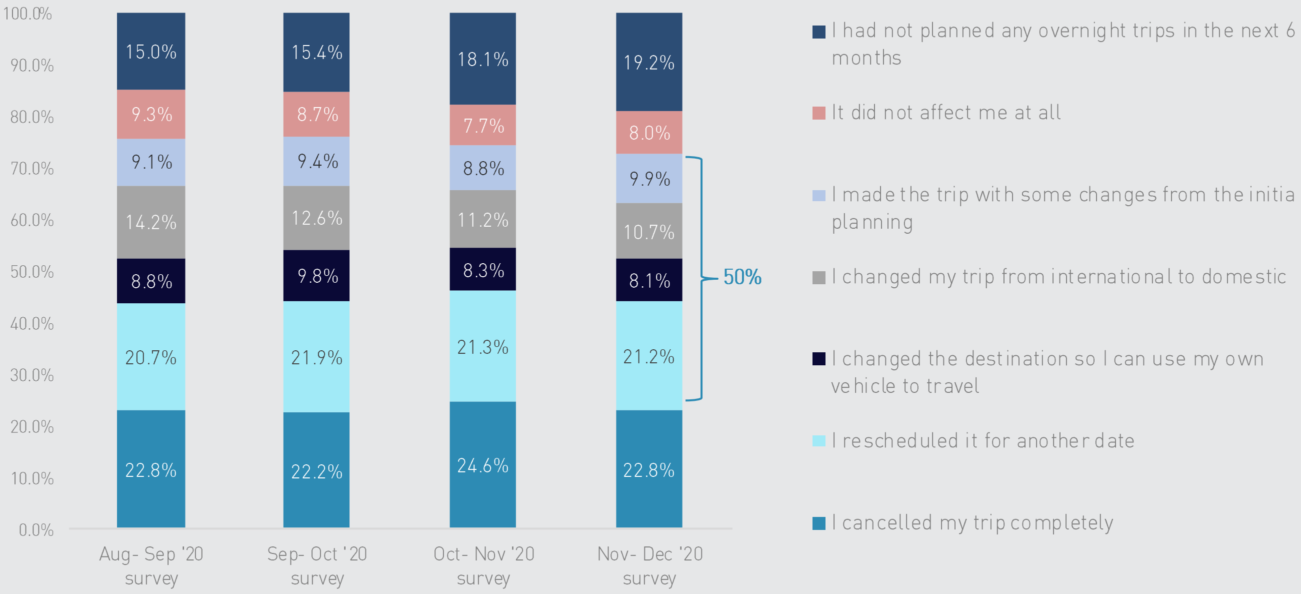
No. of respondents: 5,742

TRAVEL CONCERNS

03

While a few respondents have stopped making any travel plans, 1 in 2 Europeans remain committed and will change plans to ensure their trip still goes ahead

How has COVID-19 affected travel plans



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


Poland ▼ 13%
16.6%


Italy
16.3%


Austria ▼ 25%
14.8%


Switzerland
14.5%

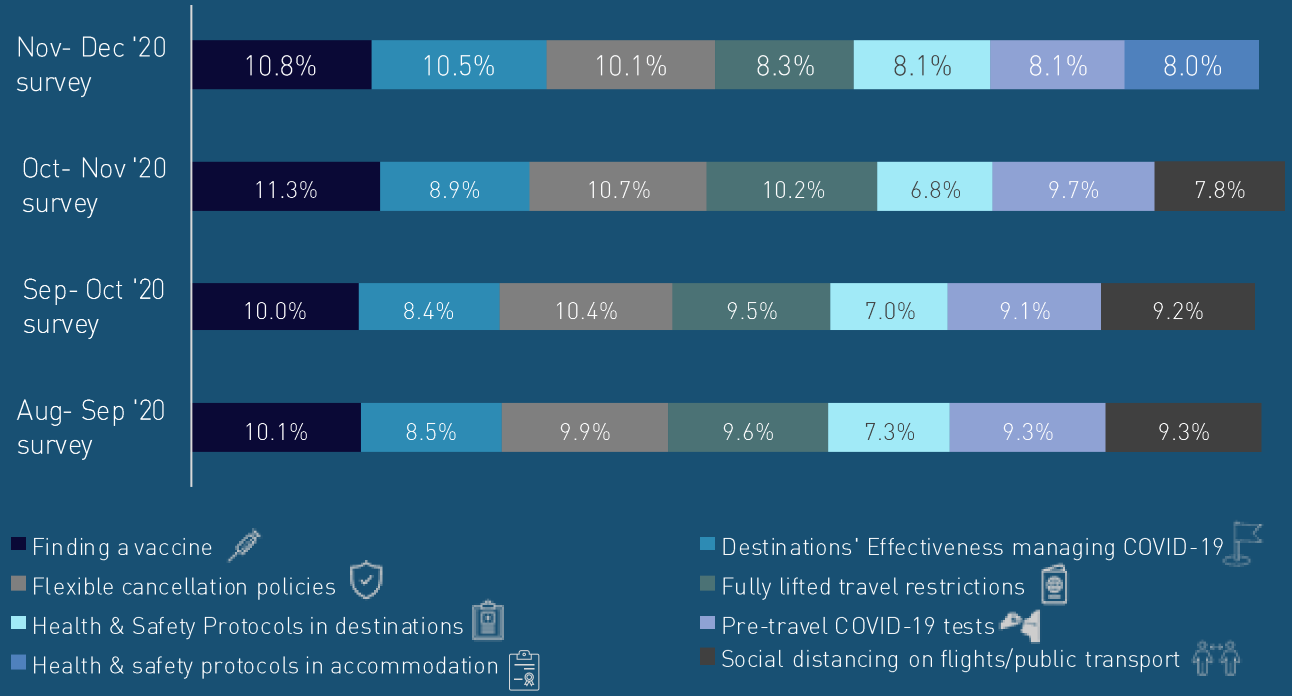

Spain
13.8%

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: 5,742

Having a COVID-19 vaccine remains the leading factor for travel decision-making, now followed by destinations' effectiveness in managing the pandemic

Most important factors to travel within Europe



15% of respondents aged 55 and above mark "finding a vaccine" as a top factor vs. 8% in the 18-24 age group

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

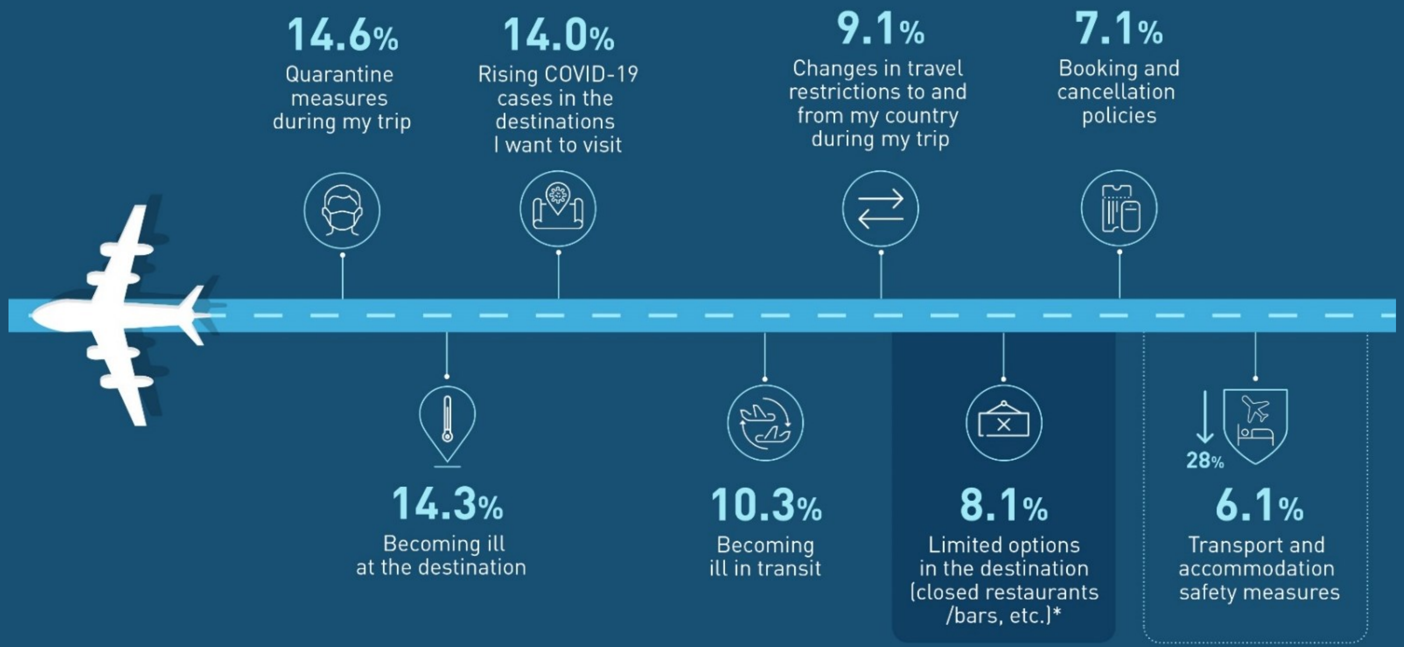
Q3.Which factors are currently most important to you to travel within Europe?

No. of respondents: 5,742

SIZING UP TRAVEL ANXIETIES

As a result of new COVID-19 cases, becoming ill at the destination and rising cases at the destination are weighted more on the minds of Europeans

Leading concerns for travelling in Europe



For the first time since Wave 1, respondents (8.1%) share that the closure of tourist attractions and facilities is among the top concerns related to travelling in Europe

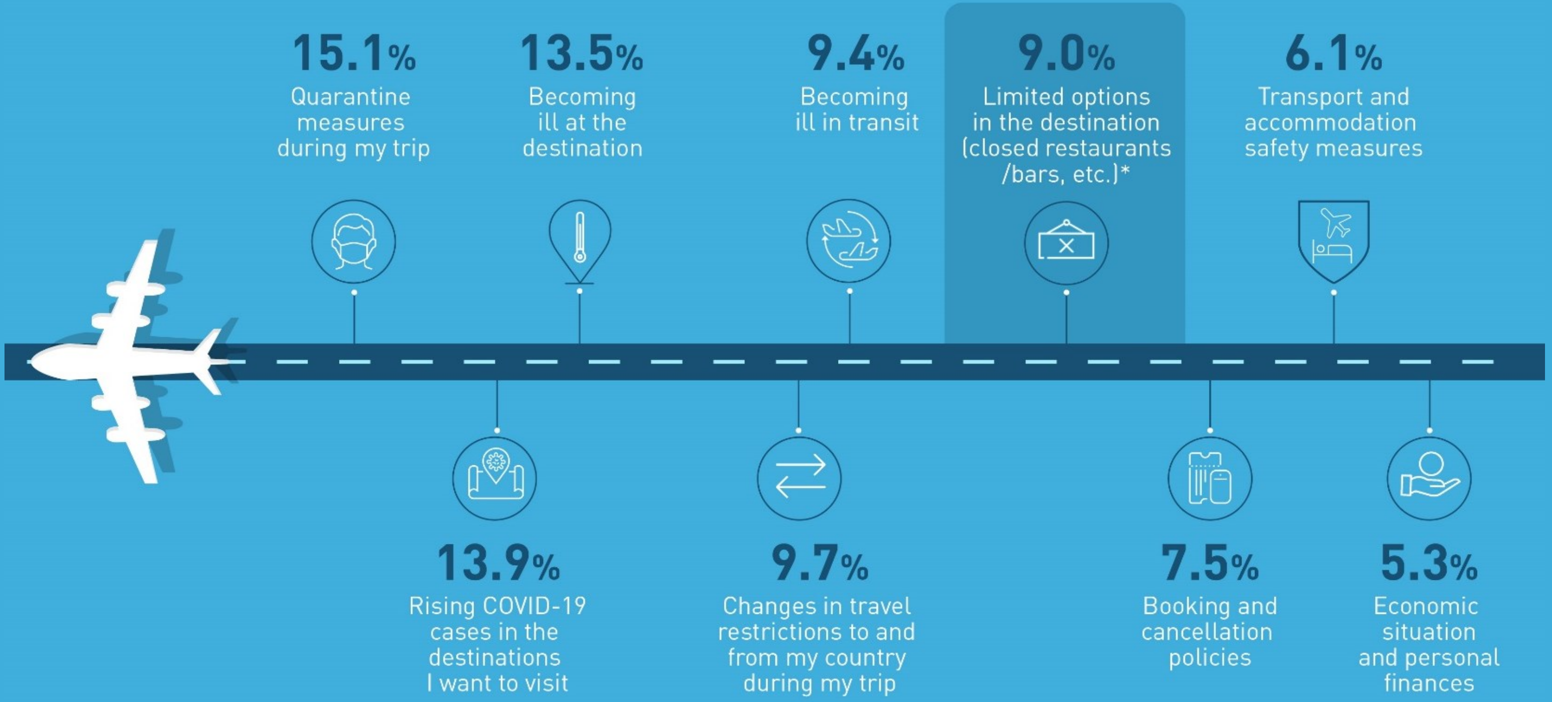
*"Limited options in the destination" appears among top travel concerns for the first time

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

No. of respondents: 5,742

Quarantine measures and rising cases are the main concerns for "early-bird" travellers while personal finance issues diminish in the wake of COVID-19 spike

Leading concerns for those who are most likely to travel next



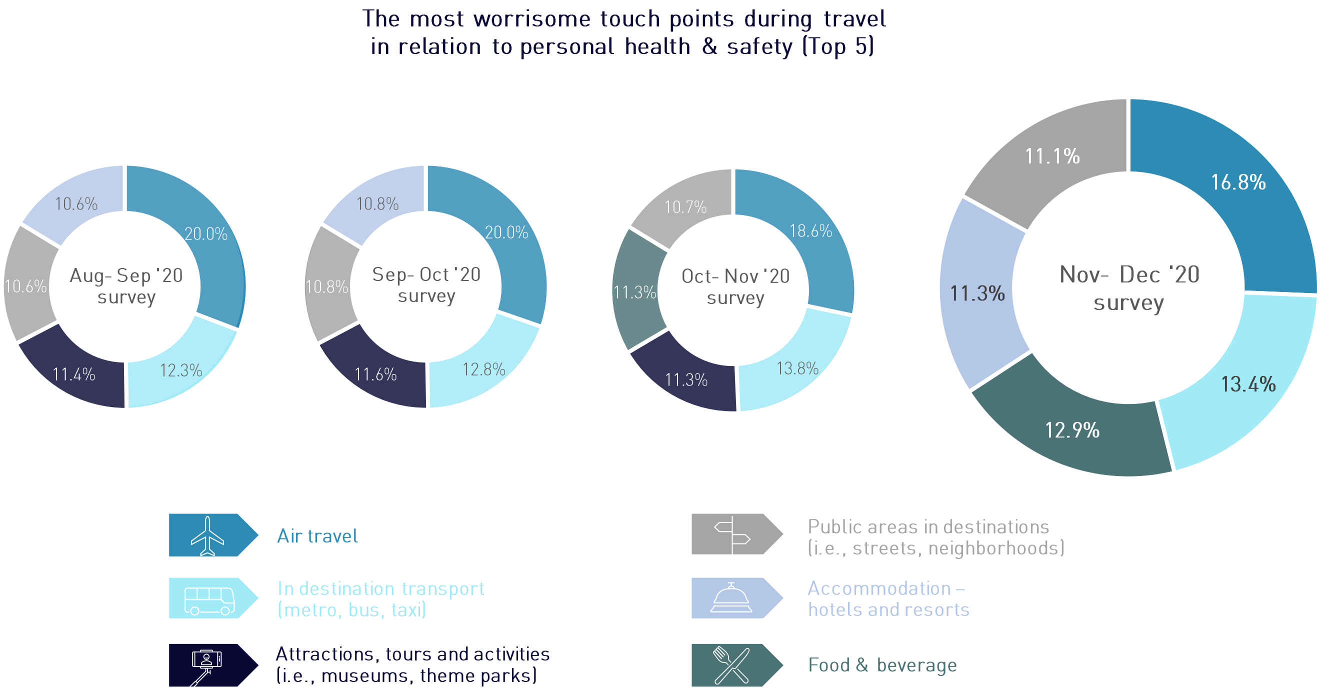
*"Limited options in the destination" appears among top travel concerns for the first time

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

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

No. of respondents: 2,992

While Europeans still express considerable unease about air travel, confidence is steadily being restored



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

No. of respondents: 5,742

STRICT PROTOCOLS SAFEGUARD THE JOY OF TRAVELLING:

2 out of 3 Europeans feel much safer & relaxed to enjoy their trip when strict health and safety protocols are in place

38.6%
I feel much safer, knowing that my health is a top concern for the destination

28.1%
I feel more relaxed to enjoy my stay

11.7%
It does not make any difference to me

13.2%
I feel I cannot enjoy everything that a place has to offer

8.4%
I feel that strict protocols can damage the joy of travelling

45% of respondents **at the age of 55 and above feel much safer** when travelling to places with strict health and safety protocols, compared to **37%** of respondents **from the other age groups** (18-54 years old).

VS

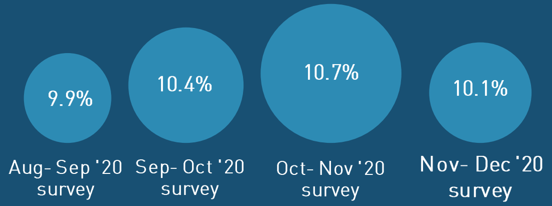
49% of respondents planning a **culture & heritage trip** feel much **safer** with strict health and safety protocols, vs. **35%** of those planning a **sun & beach trip**

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 June 2021, n=2,992
- Data was collected between 20/11/2020 - 3/12/2020

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

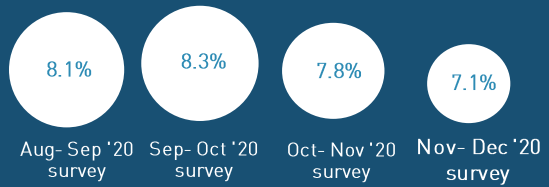
THE UNCERTAINTY CONTROL PANEL

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

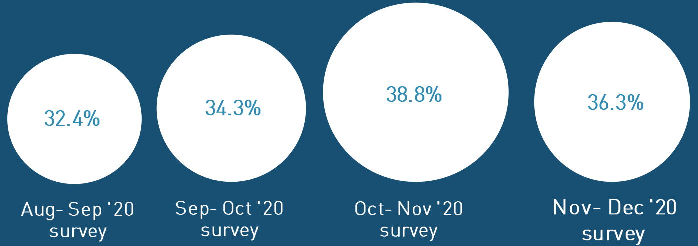


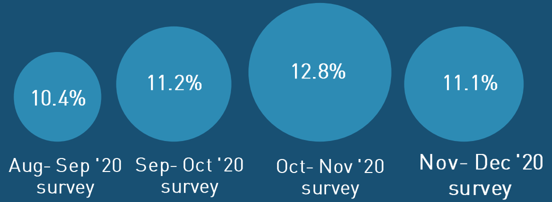
10.1% of respondents consider flexible cancellation policies as an important factor in travel decision-making

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



36.3% of respondents state that they do not know when they will travel next





11.1% 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
    - 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 (7 questions), Travel intentions, preferences and trip planning (10 questions), COVID-19 and responsible travel (3 questions)
- Wave 4: 51% of respondents are male and 49% are female
- Wave 4 - 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	58	106	92	56	140	82	139	**885**
	25 - 34	135	117	74	145	142	153	106	133	90	156	**1251**
	35 - 44	126	142	101	109	154	150	120	99	64	78	**1143**
	45 - 54	138	175	105	103	160	168	93	73	38	48	**1101**
	≥55	263	237	175	85	188	187	120	55	22	30	**1362**
Total		**750**	**750**	**500**	**500**	**750**	**750**	**495**	**500**	**296**	**451**	**5,742**

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: Cultural, Gastronomic, 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.

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.

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