

Annex A

Monitoring Sentiment for Intra-European Travel

Methodological Note

Project overview

The project Monitoring Sentiment for Intra-European Travel (MSIET) measures sentiment and short-term plans for domestic and intra-European travel. The findings are based on data collected approximately three times per year, from respondents in 10 key European markets, focusing on their anticipated travel plans for the next six months. The survey has been running continuously since September 2020 and constitutes one of the largest ongoing travel sentiment tracking studies in Europe

By the time this Request for Proposal is published, the project will have completed 24 research waves, offering forward-looking insights to European National Tourism Organisations (NTOs), the tourism private sector and media. Continuity of methodology across waves is therefore essential to the integrity of the longitudinal dataset.

Dissemination of results

- Data files and the Executive Brief are disseminated among ETC members only
- The final report and webinar are made available to the public.

Partners

- European Travel Commission - project owner
- European Commission -project partner

Survey design

Overview

The questionnaire comprises approximately 20–24 questions, with an estimated interview length of 6-9 minutes. The survey is self-completed, designed to be easy to answer, minimising respondent burden whilst maintaining the depth required for strategic insight. The questionnaire covers, but is not limited to, the following topics:

- Intention to travel in the next six months and trip purpose
- Destination selection criteria
- Intended number of trips
- Travel periods, spending, duration, and destinations
- Mode of transport

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- Booking status
- Travel concerns

The full questionnaire will be made available to the awarded contractor.

Target sample

Eligibility criteria

- Participation in the survey is limited to adults (18+), from the target markets, who have taken more than one domestic or international overnight trip in the past three years.
- Respondents from the target markets, who are under 18 years of age or who have not undertaken any travel during this period, are excluded through initial screening questions.

Sample sizes per market

A total sample of N = 6,000 respondents per wave is targeted, distributed across the ten source markets as follows:

Country	UK	IT	FR	DE	ES	AT	PL	BE	CH	NL	Total Sample
Sample	750	750	750	750	500	500	500	500	500	500	6000
Survey Language	English	Italian	French	German	Spanish	German	Polish	French & Dutch	German & French	Dutch	-

Quotas

Hard quotas are applied in six out of ten markets: the United Kingdom, Italy, Spain, France, Germany, and Poland. For the remaining four markets - Austria, Belgium, Switzerland, and the Netherlands - soft age quotas with a tolerance of 10–15% deviation are applied, combined with close fieldwork monitoring, to achieve representative samples whilst ensuring high completion rates and timely fieldwork completion.

Data collection schedule

Data is typically collected three times a year, in March, May, and September, with each wave monitoring travel intentions for the next six months.

- Each fieldwork window is aligned with equivalent waves from previous MSIET editions to safeguard year-on-year comparability of results.
- Data collection typically runs for two weeks per wave.
- The survey is conducted through Computer Assisted Web Interviews (CAWI).

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Previous fieldwork periods

Wave 25	16-30 May 2026	Summer/Autumn'26 horizon
Wave 24	4-20 March 2026	Spring/Summer'26 horizon
Wave 23	6-26 September 2025	Autumn'25/Winter'26 horizon
Wave 22	27 May-10 June 2025	Summer/Autumn'25 horizon
Wave 21	3-17 March 2025	Spring/Summer'25 horizon

Further details

When referring to European sub-regions in this project, the following classification applies (2024 onwards)*:

- **Southern/Mediterranean Europe:** France, Croatia, Cyprus, Greece, Italy, Malta, Monaco, Montenegro, Portugal, San-Marino, Slovenia, Spain, Türkiye, Albania, Bosnia-Herzegovina, North Macedonia
- **Western Europe:** Austria, Belgium, Germany, Luxembourg, Netherlands, Switzerland
- **Northern Europe:** Denmark, Finland, Iceland, Ireland, Norway, Sweden, UK
- **Central Europe:** Czech Republic, Hungary, Poland, Slovakia
- **Eastern Europe:** Bulgaria, Estonia, Latvia, Lithuania, Romania, Serbia, Ukraine, Belarus, Moldova

* **NOTE:** Until summer 2023, the list of destinations did not include Albania, Bosnia-Herzegovina, North Macedonia, Belarus and Moldova

References

As a reference for the survey questions and the analysis conducted, please see the previous reports published on the ETC website [here](#).

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