



## MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 6 | 04/21

Co-funded by  
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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<sup>1</sup> 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<sup>2</sup>, while visiting friends and relatives is the main purpose for 19% of travellers.

# 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.<sup>1</sup>

- 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<sup>2</sup>** - 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<sup>2</sup>** 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'**.

<sup>1</sup> Benchmark report for major European destinations; January 2021 compared to January 2020 (Mabrian Technologies, April 2021)

<sup>2</sup> 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<sup>1</sup> 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.

# 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.



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# 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.

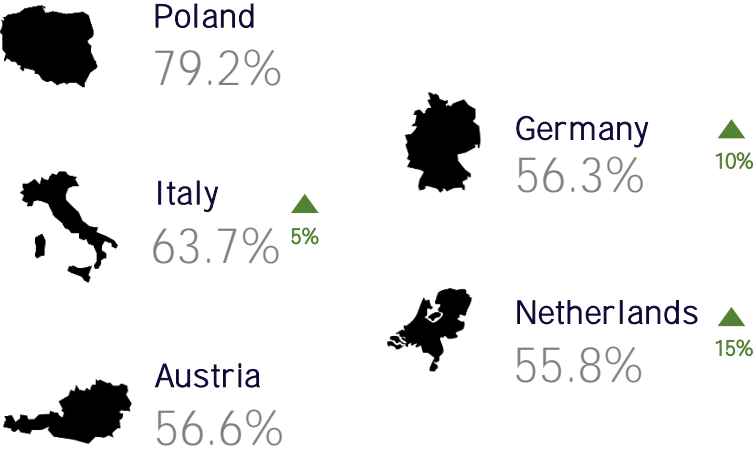
# TRAVEL INTENTIONS

01

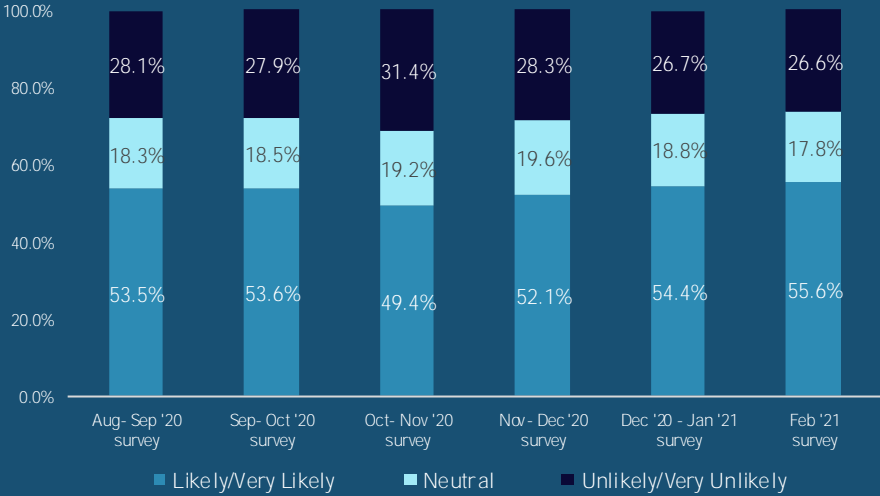
Travel sentiment climbs to its highest level since September 2020:  
56% of Europeans intend to travel by the end of August 2021



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



Intention to travel in the next 6 months



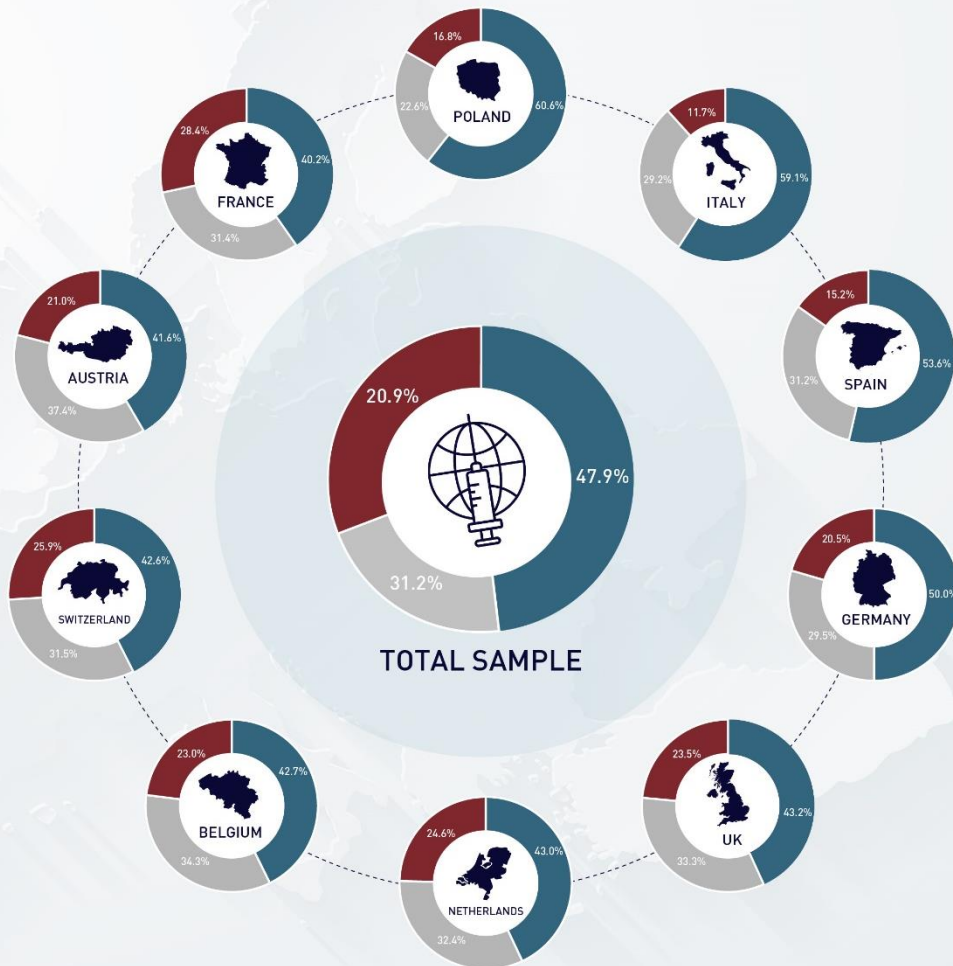
# 1 IN 2 EUROPEANS FEEL MORE OPTIMISTIC ABOUT TRAVEL AS A RESULT OF THE VACCINE ROLLOUT

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

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

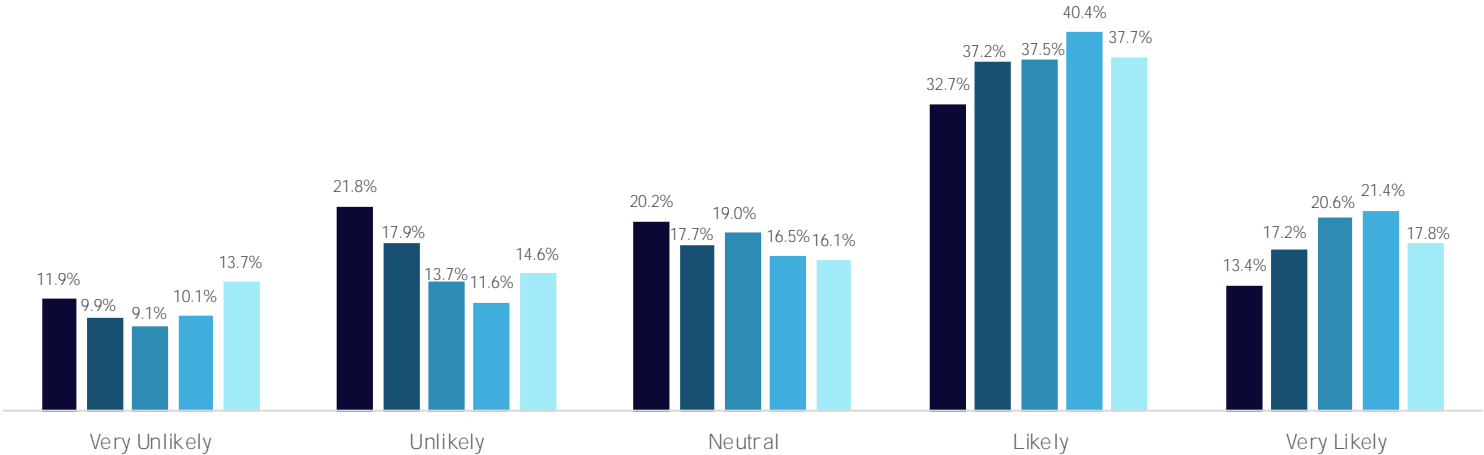


# Interest in travel by summer's end surges among 45 to 55-year-olds, while Gen Z (18-24) hesitancy persists



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

Intention to travel in the next 6 months by age group



Feb '21 survey

18-24



25-34



35-44



45-54



>55

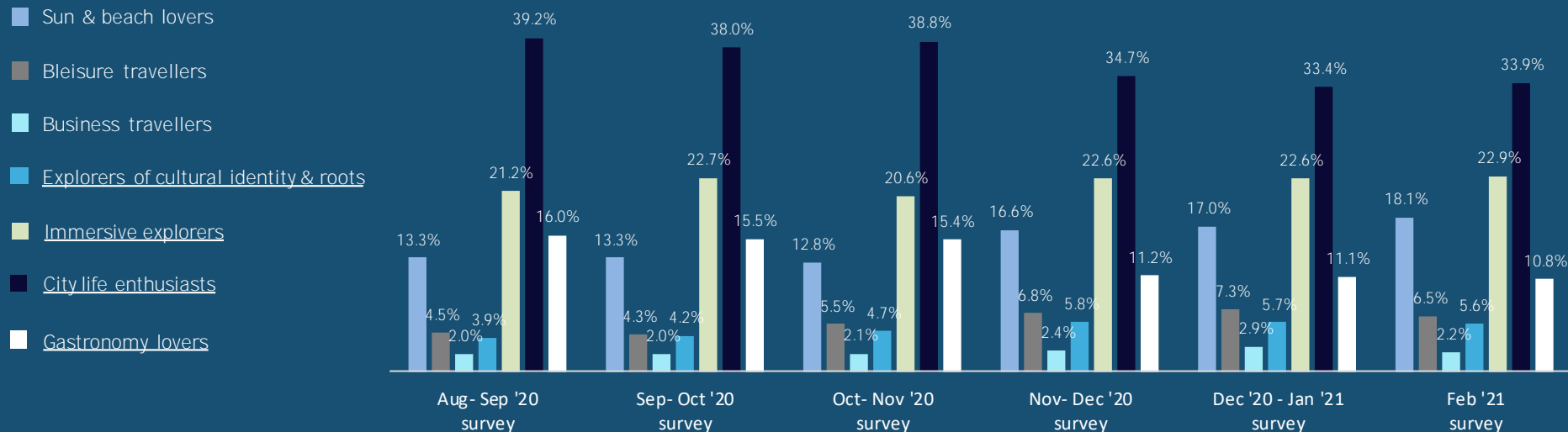




## Despite rise in interest for sun and beach holidays, urban destinations maintain a steady fascination among European travellers

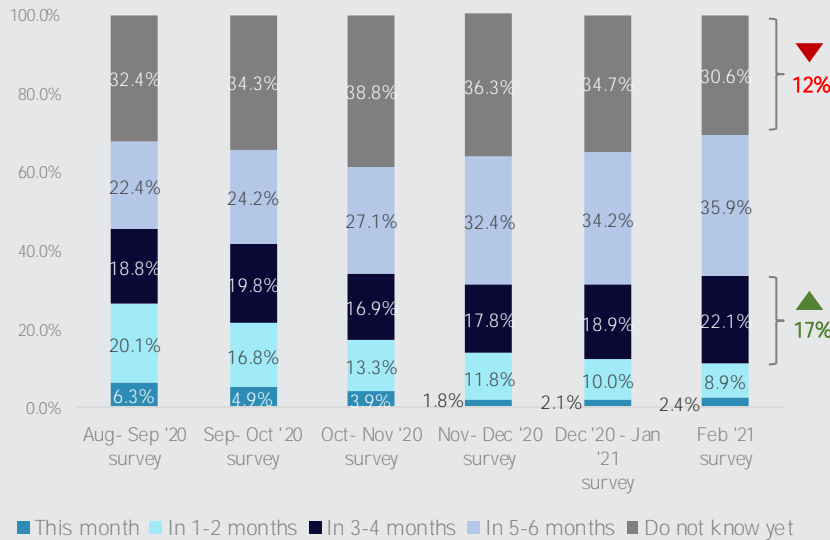


Respondents most likely to travel in the next 6 months,  
per type of traveller

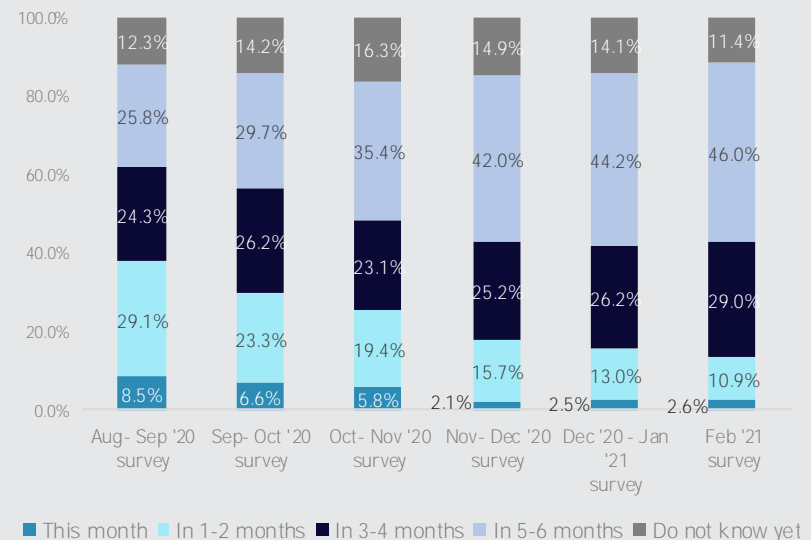


## The overall sample displays increasing certainty about trip timing, with many eyeing July-August

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

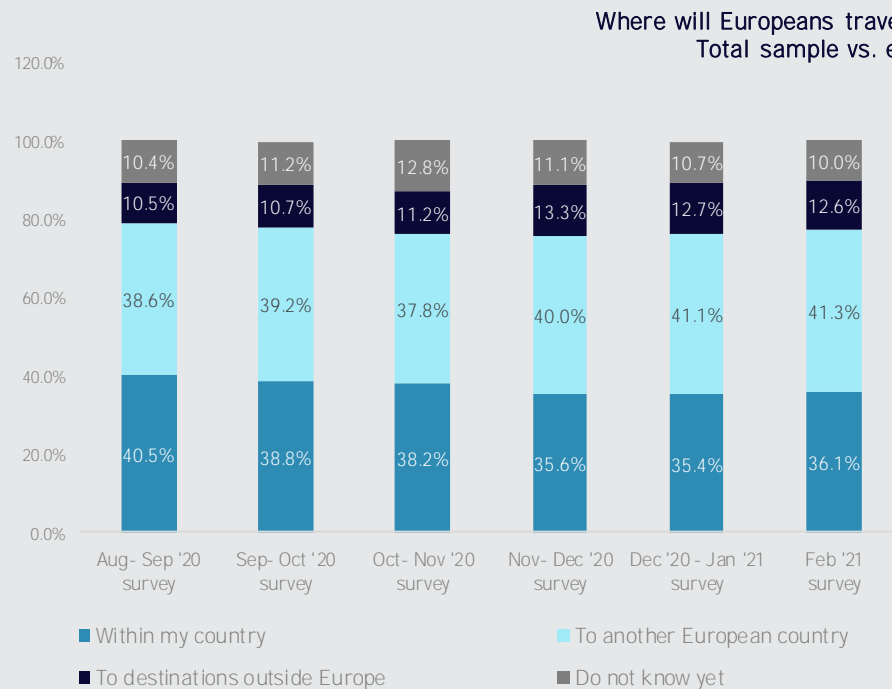


No. of respondents: 5,837

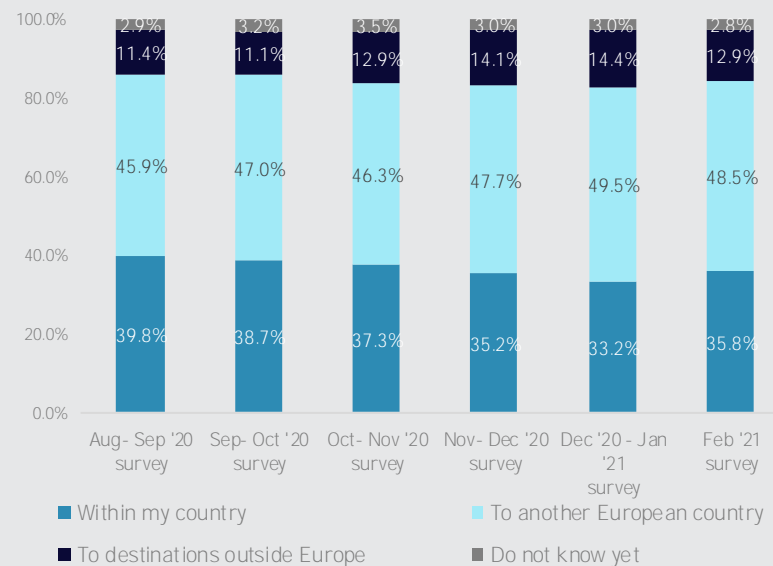


No. of respondents: 3,246

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



No. of respondents: 5,837



No. of respondents: 3,246

Feb '21 survey

## PREFERRED COUNTRIES FOR THE NEXT EUROPEAN TRIP

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

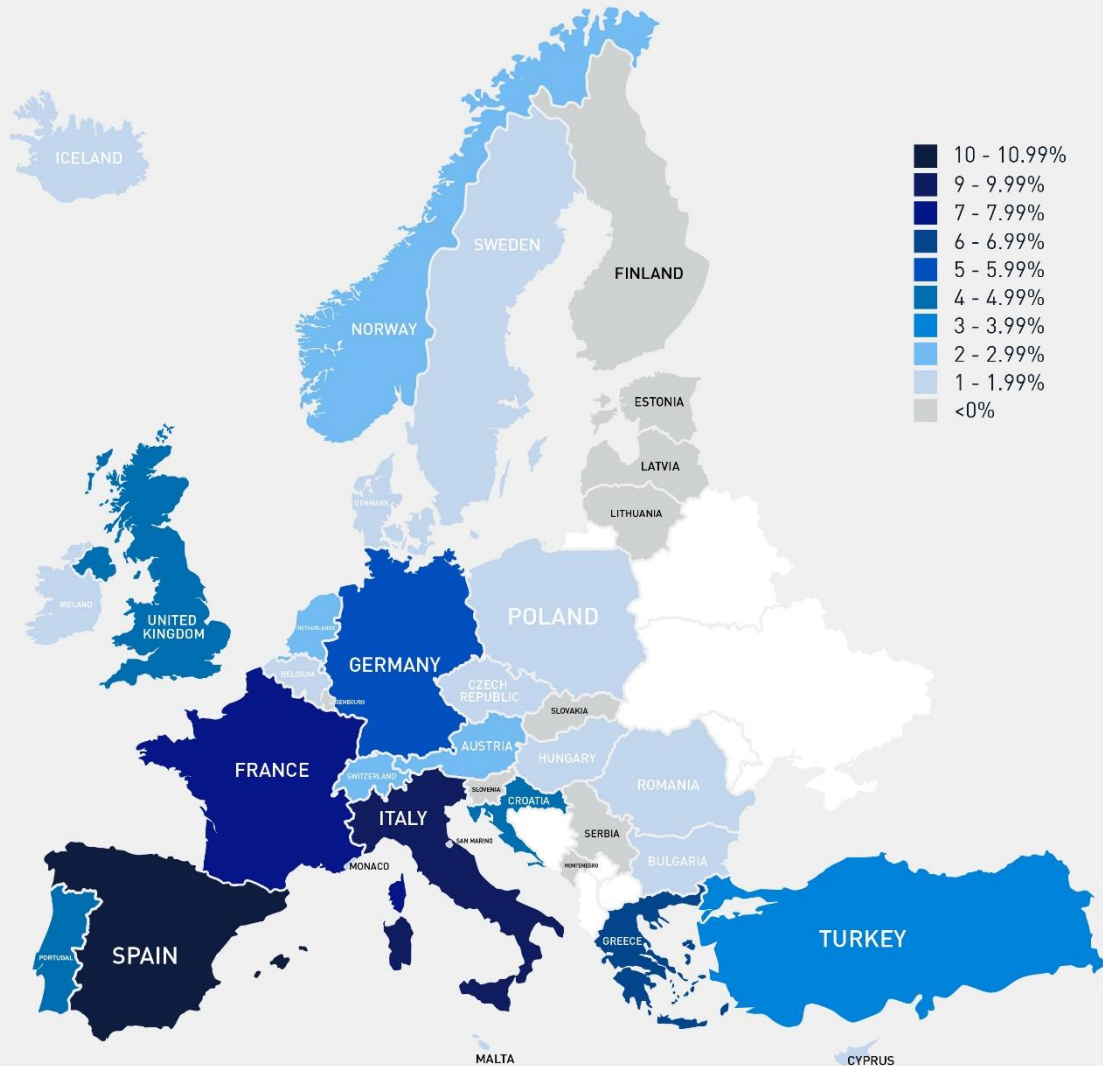
### TOP 10 COUNTRIES

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



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



Top 3 markets to resume leisure travel



Poland ▲  
74.7% 15%



Italy  
72.8%



Belgium  
68.3%



Top 3 markets to resume business travel



Germany  
11.1%

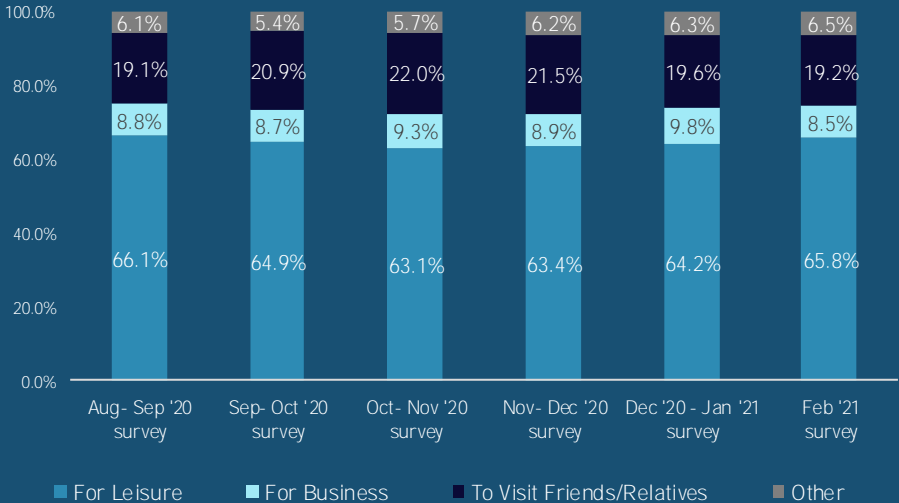


Spain  
10.8%



Netherlands  
10.4%

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





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



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

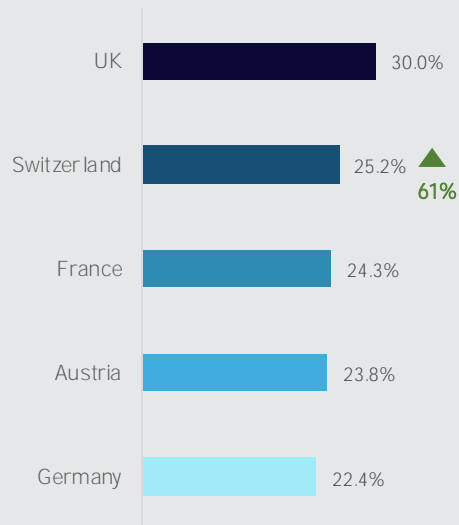
\* No significant changes between waves were recorded for this question  
19 Q17.What type of leisure trip within Europe are you most likely to undertake next?

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

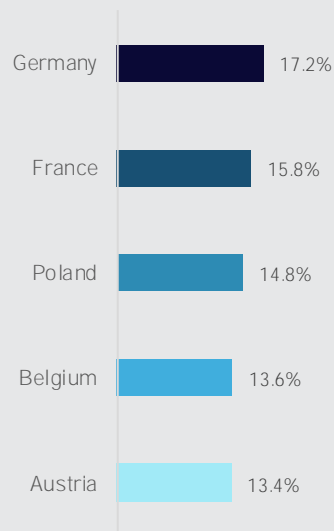
Feb '21 survey



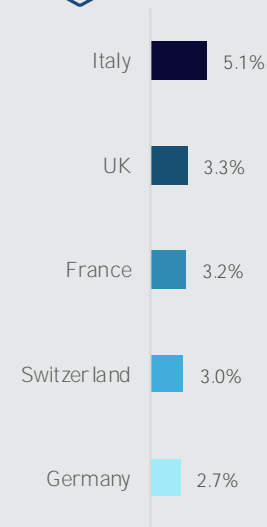
Sun & Beach



Coast & Sea



Cruising



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

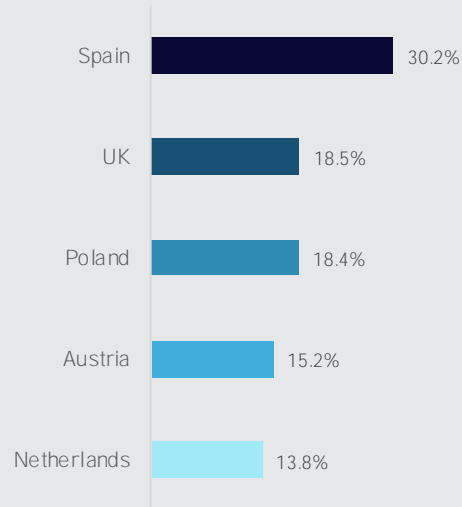
No. of respondents: 5,837

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

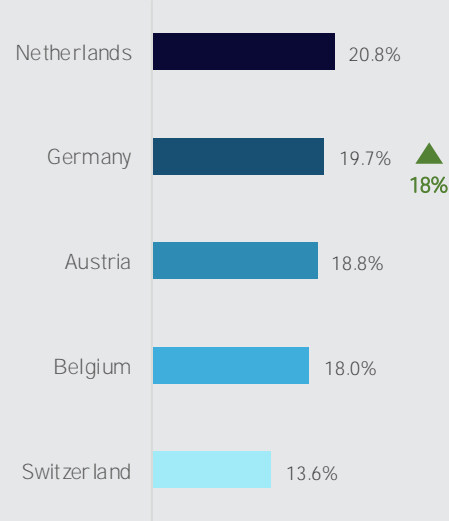
Feb '21 survey



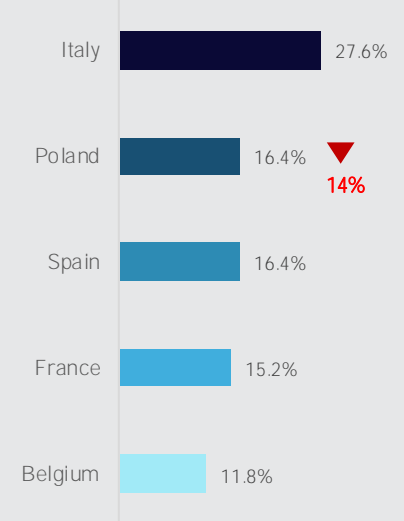
City Break



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

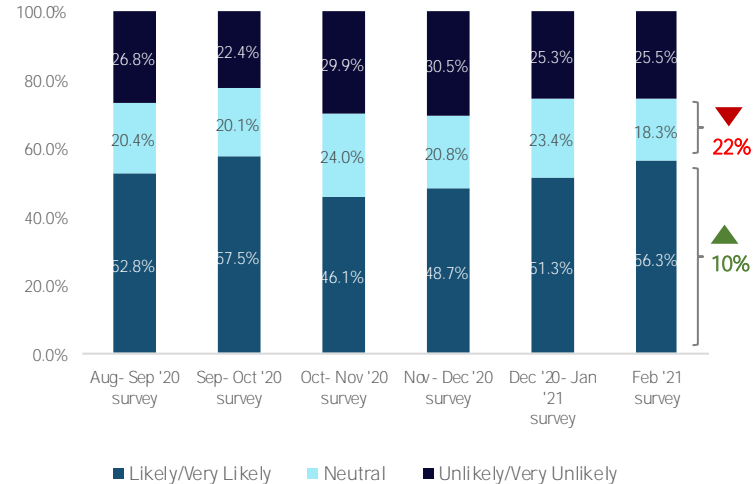
No. of respondents: 5,837

# GERMANY

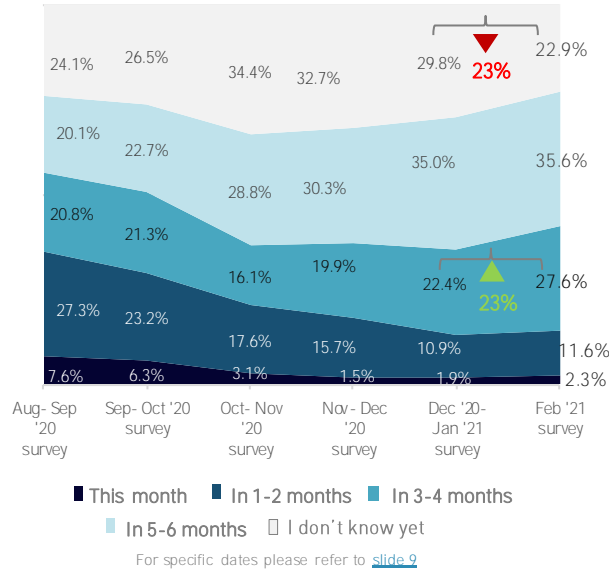
More than 1 in 2 Germans are optimistic about travelling in the next 6 months, with a particular emphasis on July and August trips



Willingness to travel in the next 6 months

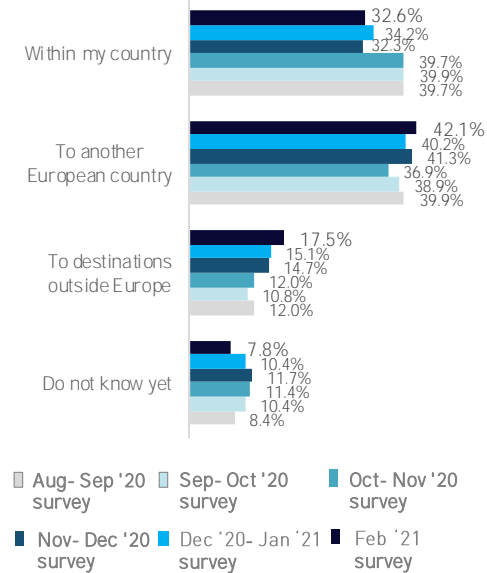


When will Germans travel?



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

Where will Germans travel within the next 6 months?



Q10. Where do you plan 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?

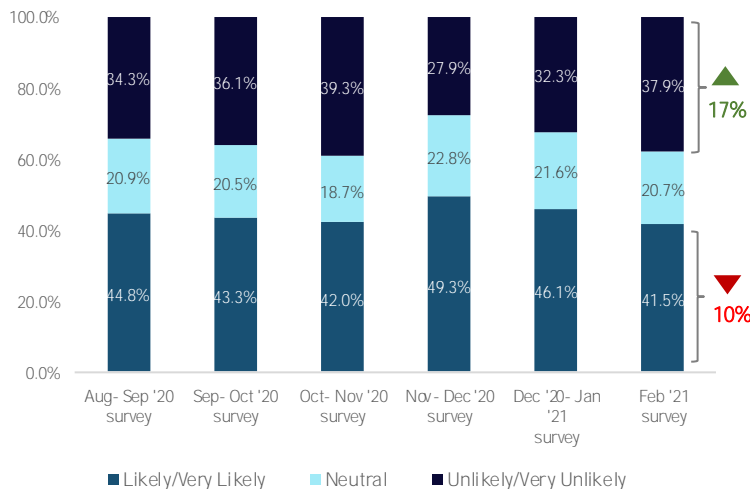
No. of respondents: 750

# UNITED KINGDOM

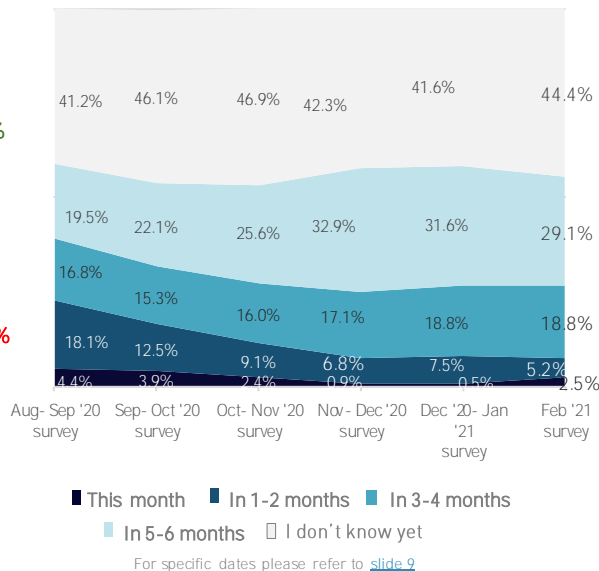
## Britons' sentiment greatly deteriorates in light of UK government advice against non-essential international travel\*



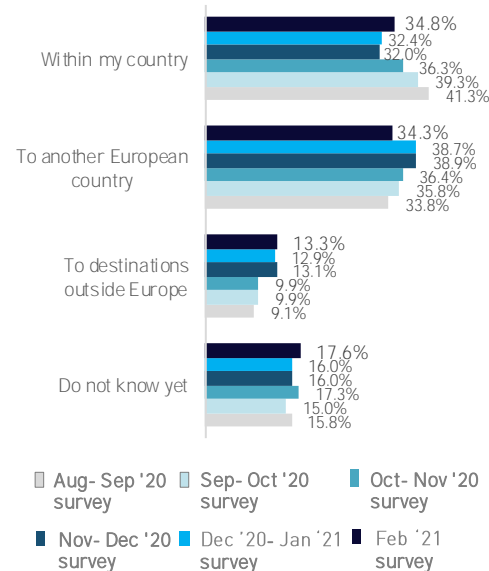
Willingness to travel in the next 6 months



When will Britons travel?



Where will Britons travel within the next 6 months?



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

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

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

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

No. of respondents: 750

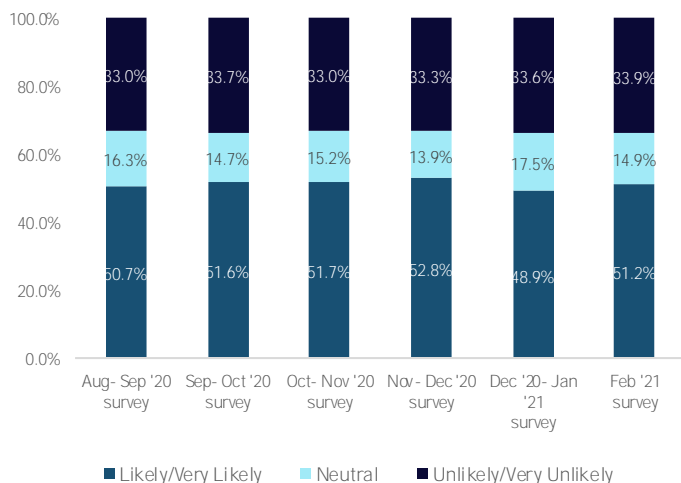


# FRANCE

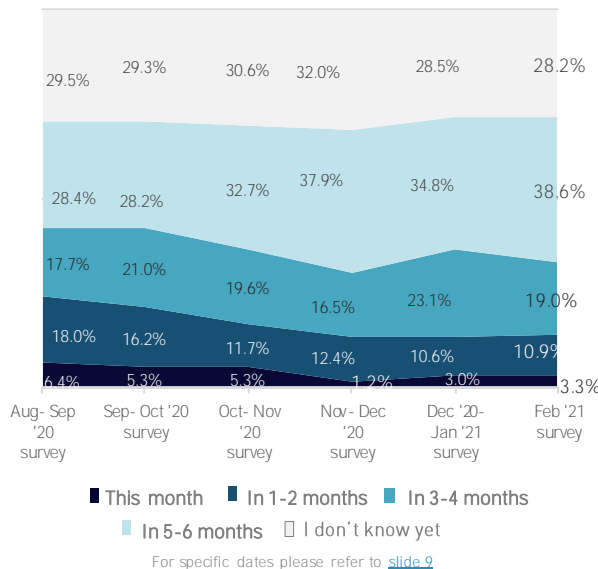
The French maintain a stable travel sentiment with 39% looking at July and August for their next vacations



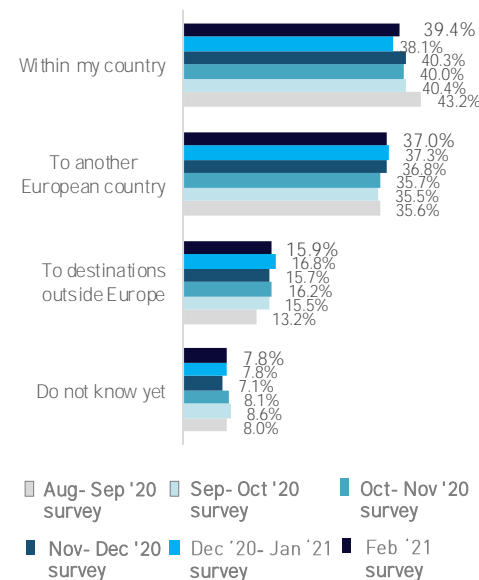
Willingness to travel in the next 6 months



When will French travel?



Where will French 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?

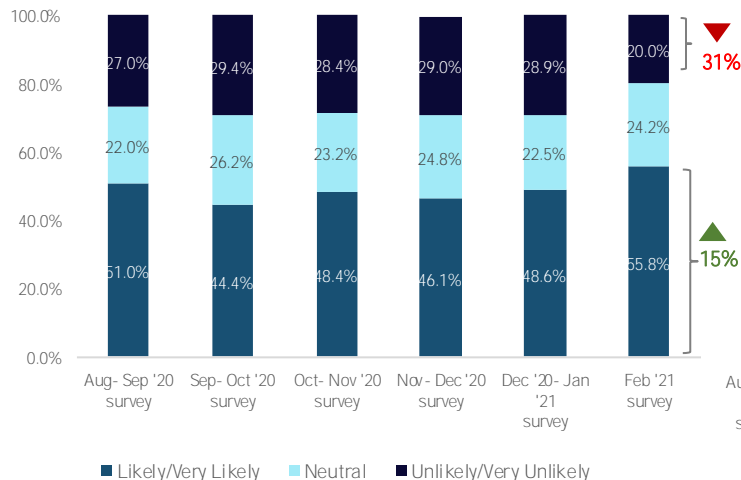
Q10.Where do you plan to travel in the next 6 months?

# NETHERLANDS

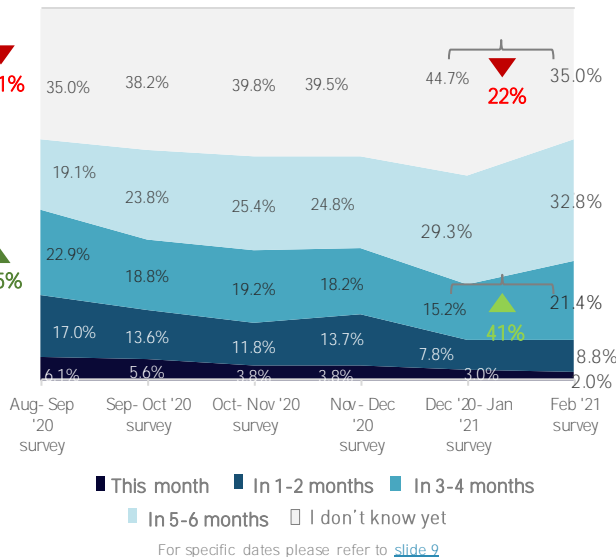
The Dutch are now more interested in taking a trip during the next 6 months (+15%), with destinations abroad\* becoming more appealing (+7%)



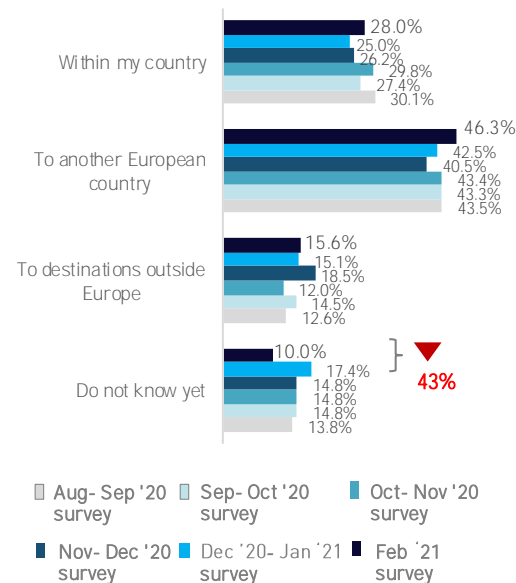
Willingness to travel in the next 6 months



When will Dutch travel?



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?

\*Refers to other European countries and countries outside Europe.

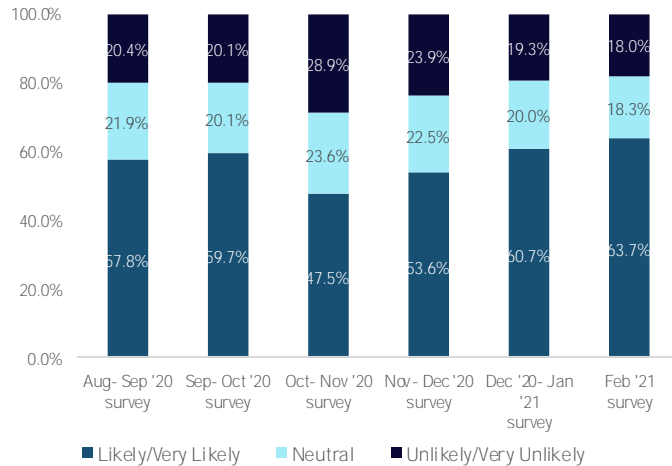
No. of respondents: 500

# ITALY

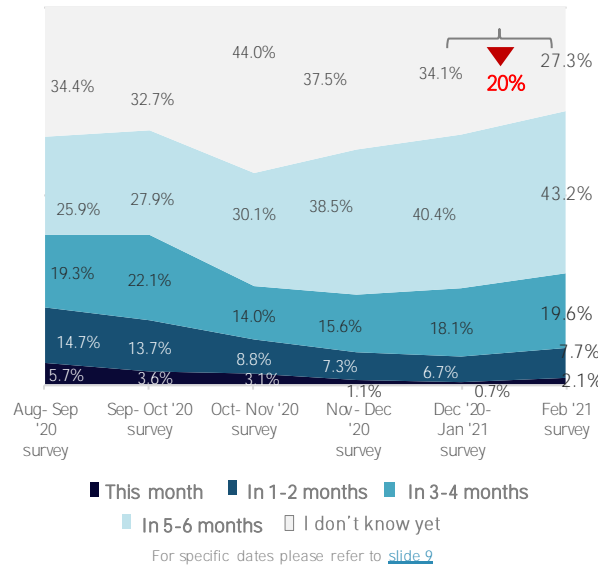
## 2 in 5 Italians plan to take a trip around mid to late summer, favouring domestic destinations



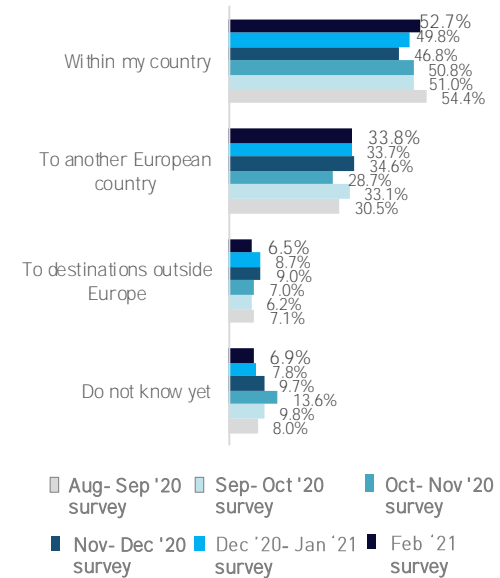
Willingness to travel in the next 6 months



When will Italians travel?



Where will Italians 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?

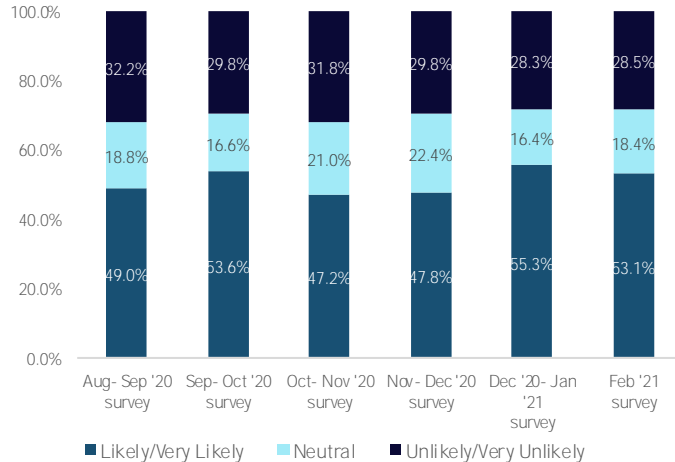
Q10. Where do you plan to travel in the next 6 months?

# BELGIUM

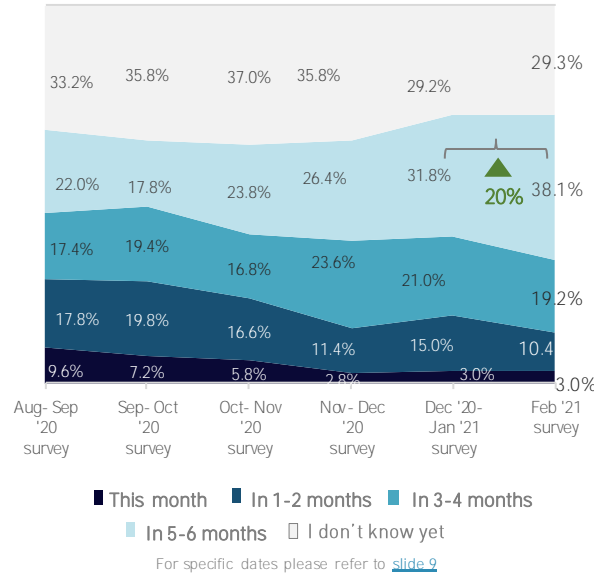
Belgian respondents show preference for intra-European travel with July and August (+20%) perceived as the most feasible time for trips



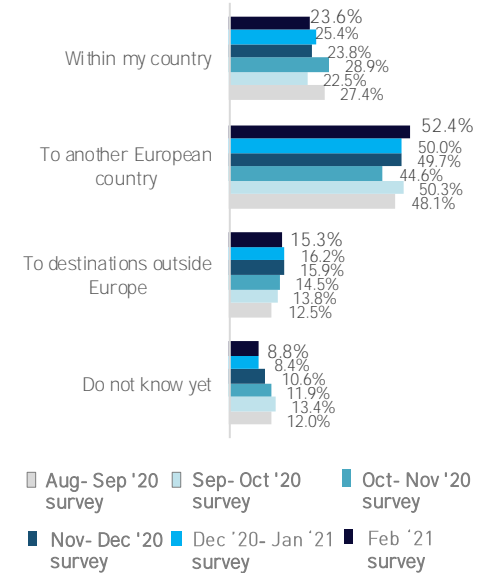
Willingness to travel in the next 6 months



When will Belgians travel?



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?

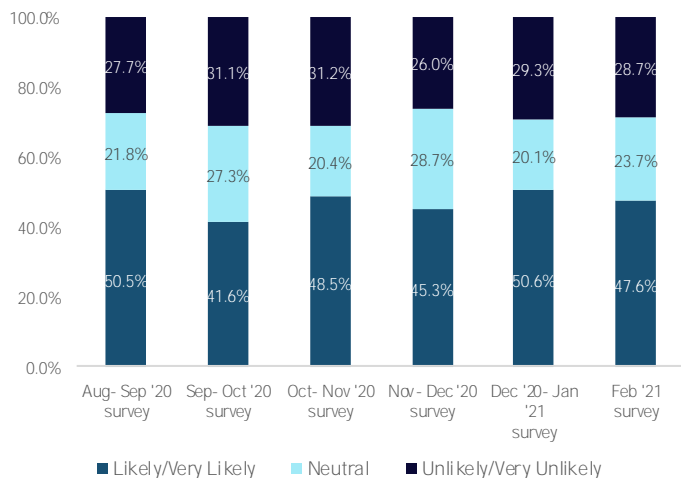
Q10.Where do you plan to travel in the next 6 months?

# SWITZERLAND

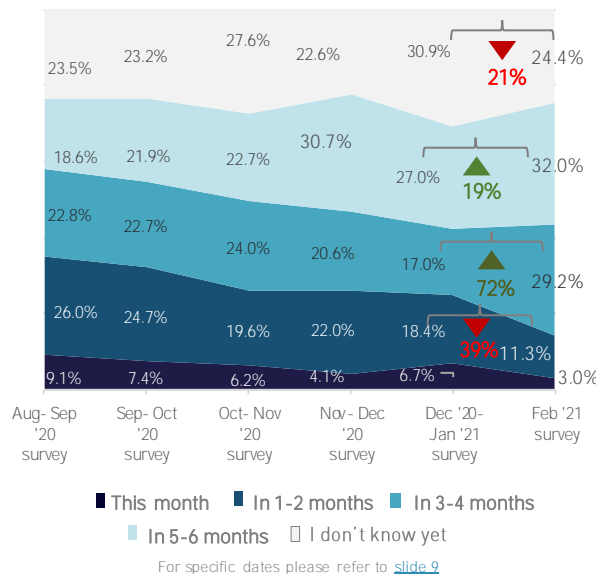
The Swiss are starting to pinpoint exact timing of their next trip, reporting a 72% surge in their travel plans for the period May-June 2021



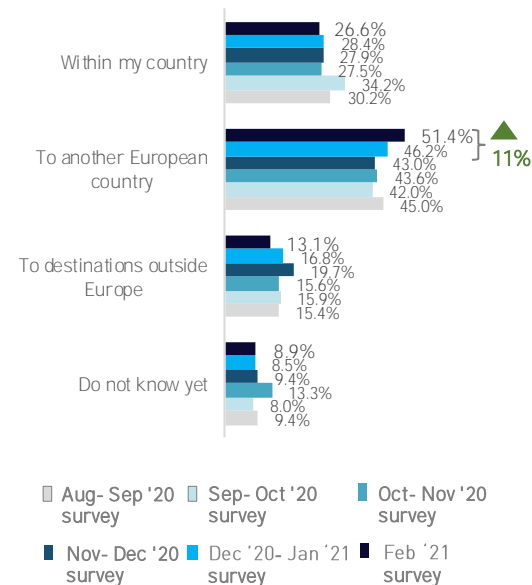
Willingness to travel in the next 6 months



When will Swiss travel?



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?

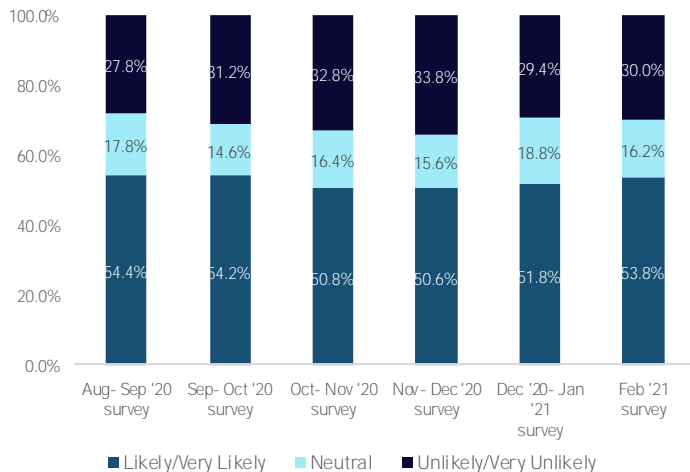
Q10.Where do you plan to travel in the next 6 months?

# SPAIN

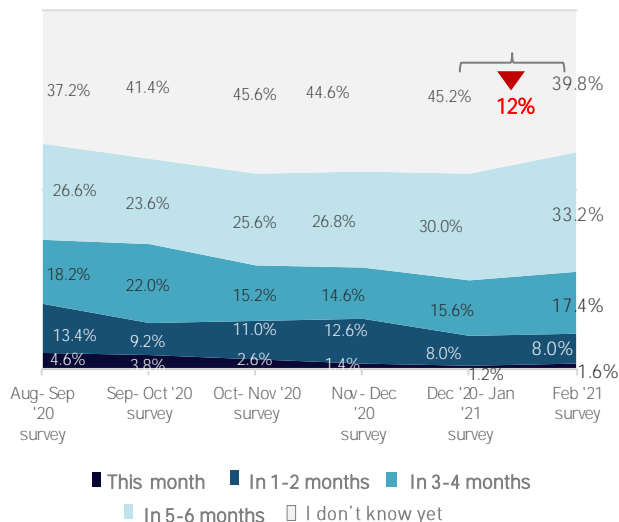
Spanish respondents display the second strongest desire for domestic travel from all surveyed markets, without committing to an exact date



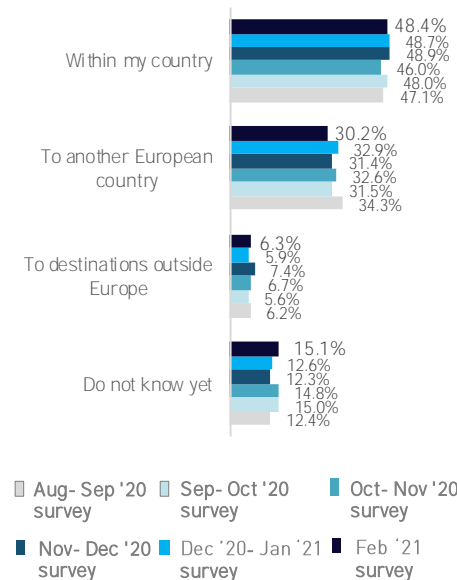
Willingness to travel in the next 6 months



When will Spaniards travel?



Where will Spaniards 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?

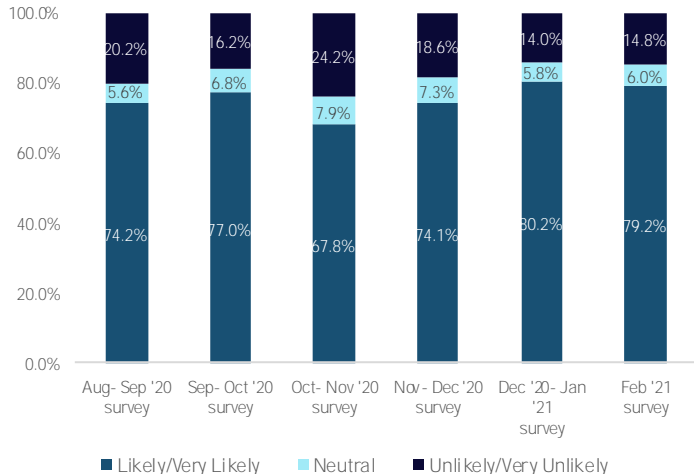
Q10.Where do you plan to travel in the next 6 months?

# POLAND

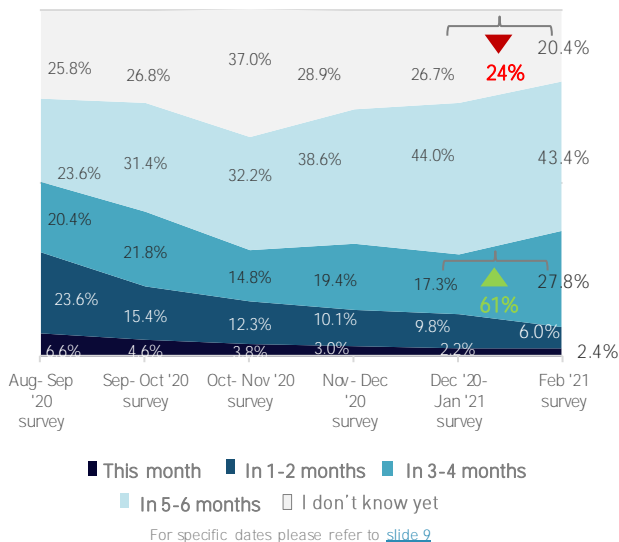
Eager to be on the move, more Poles (+61%) are targeting May and June and are primarily interested in visiting foreign destinations



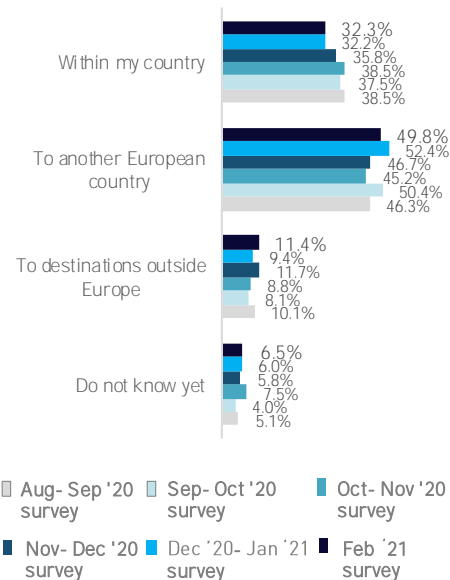
Willingness to travel in the next 6 months



When will Poles travel?



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?

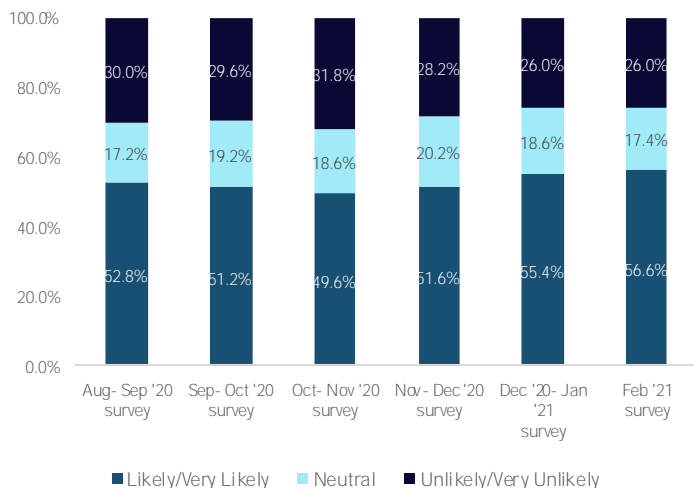
Q10. Where do you plan to travel in the next 6 months?

# AUSTRIA

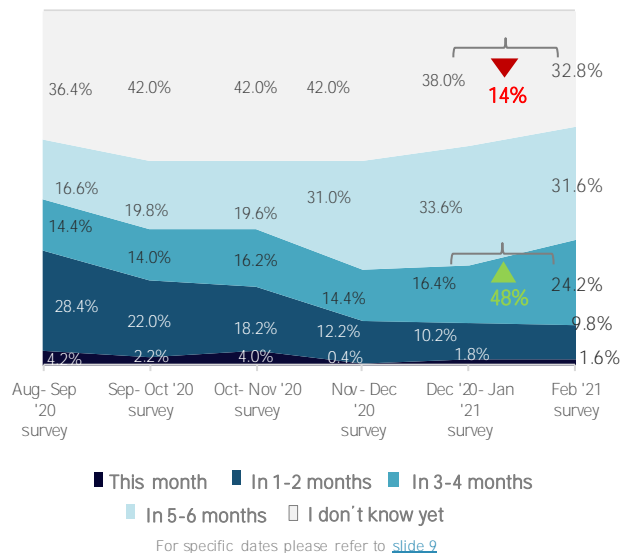
Austrians are now keener on travel than at any time in the last 6 months, with a 48% rise in planned trips for May and June



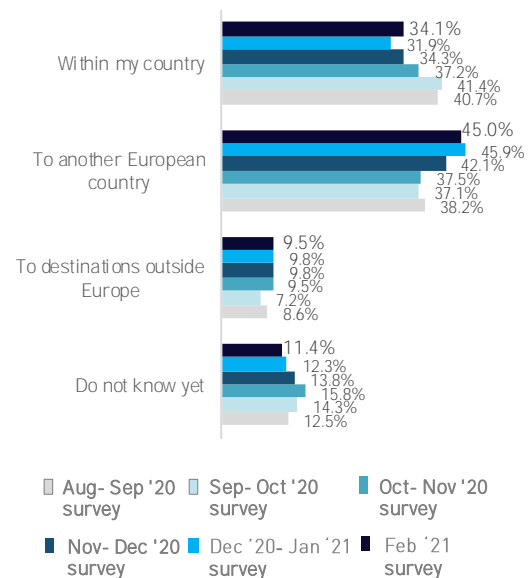
Willingness to travel in the next 6 months



When will Austrians travel?



Where will Austrians 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



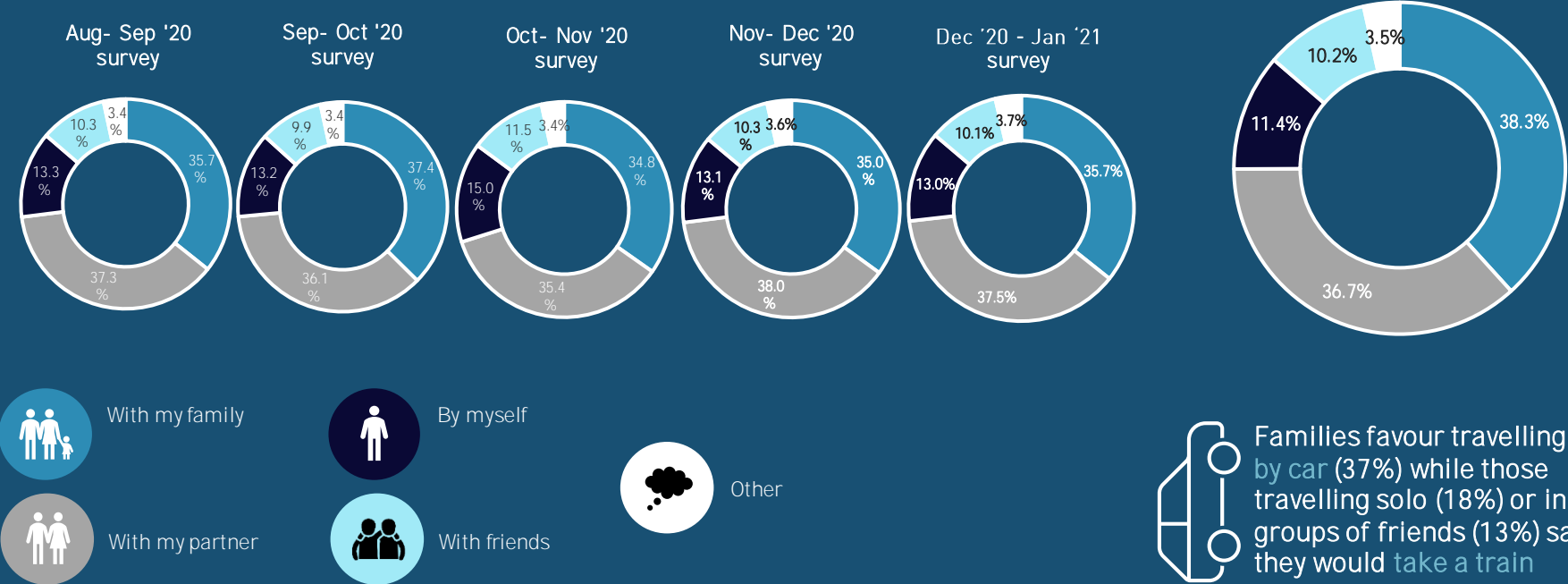
# TRIP PLANNING



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



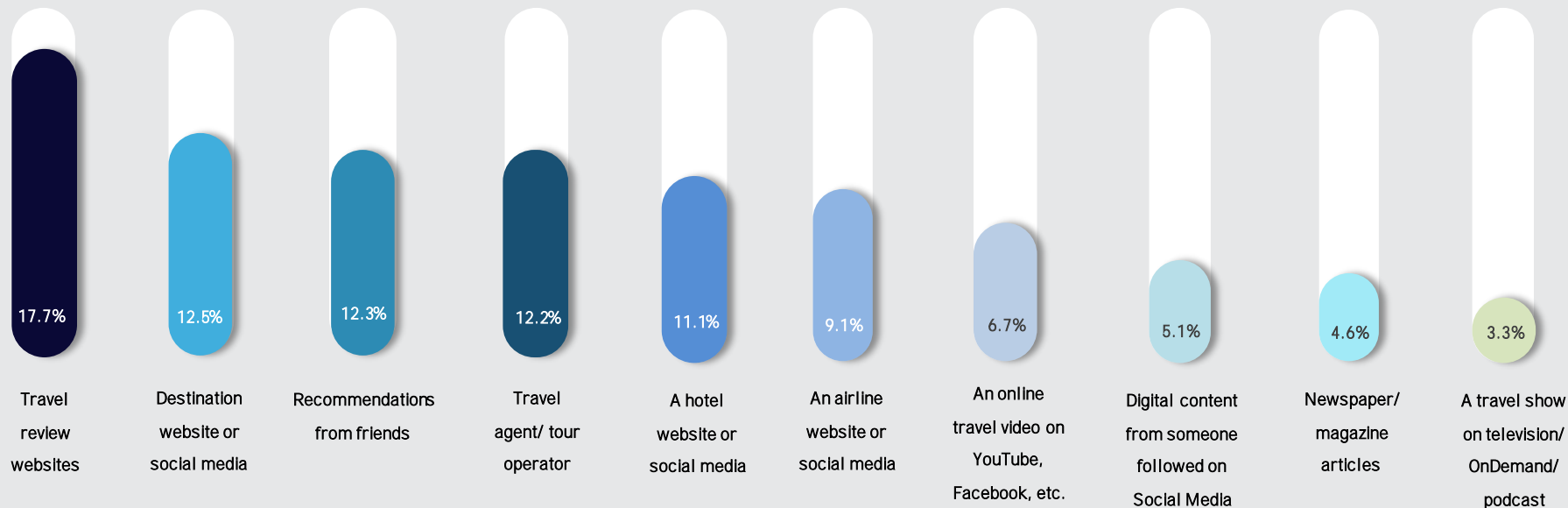
Preferred travel companion for respondents most likely to travel in the next 6 months



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

## 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



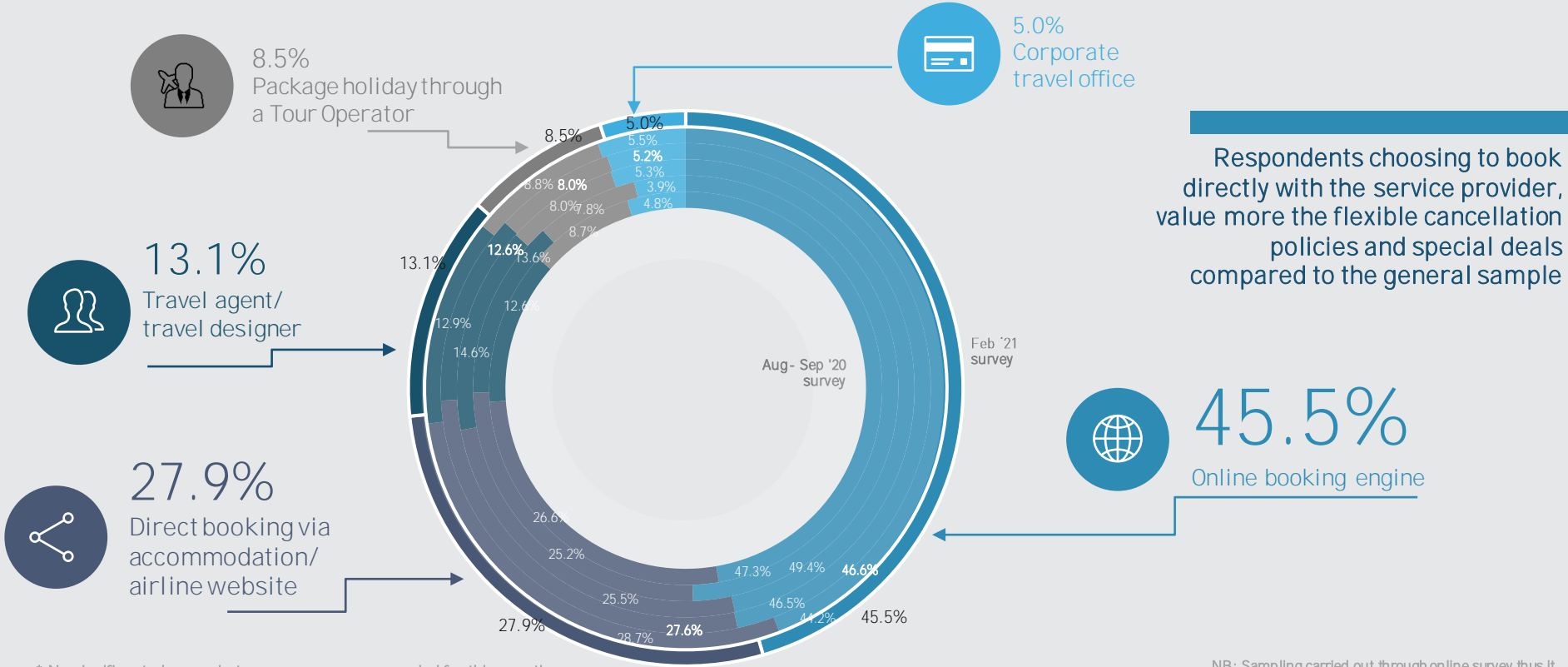
Feb '21 survey

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

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



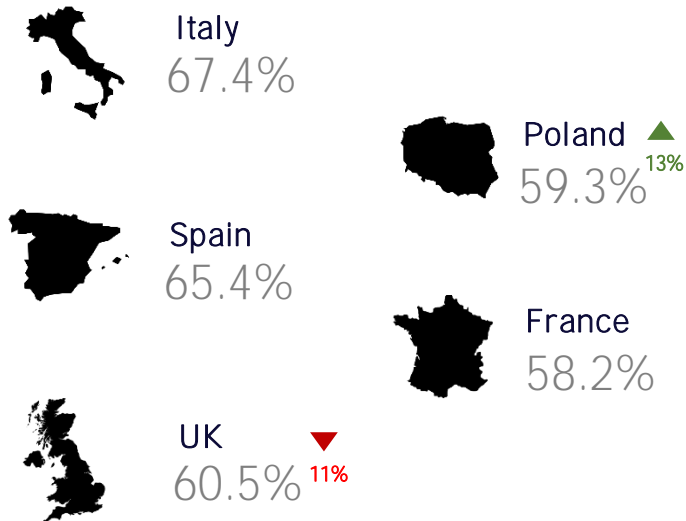
\* No significant changes between waves were recorded for this question

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

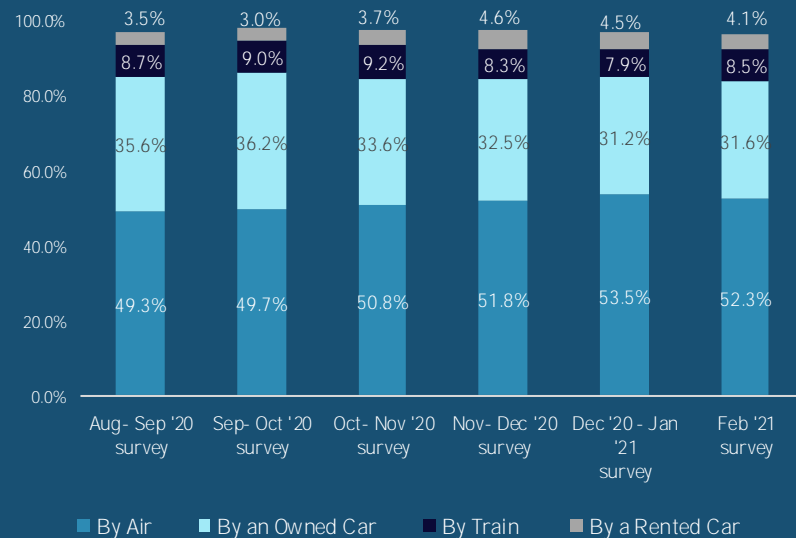
No. of respondents: 3,246

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

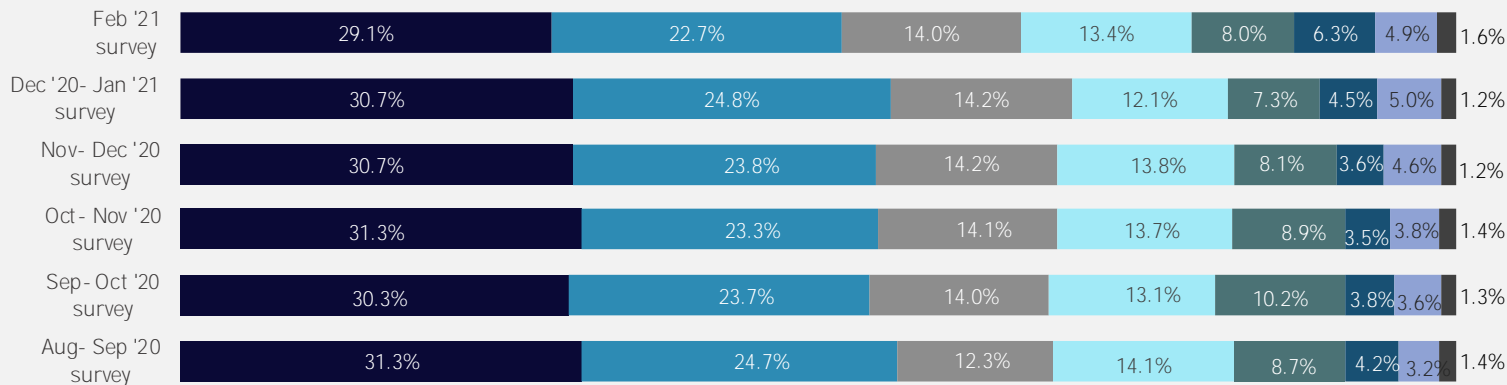


Top 4 modes of transport for respondents most likely to travel in the next 6 months



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 chain or resort



Independent hotel/  
resort



Friends and/or family



Short-term rental via online  
platform



Other paid serviced accommodation  
(bed and breakfast, etc.)



Camping/caravan



Hostel/motel



Other



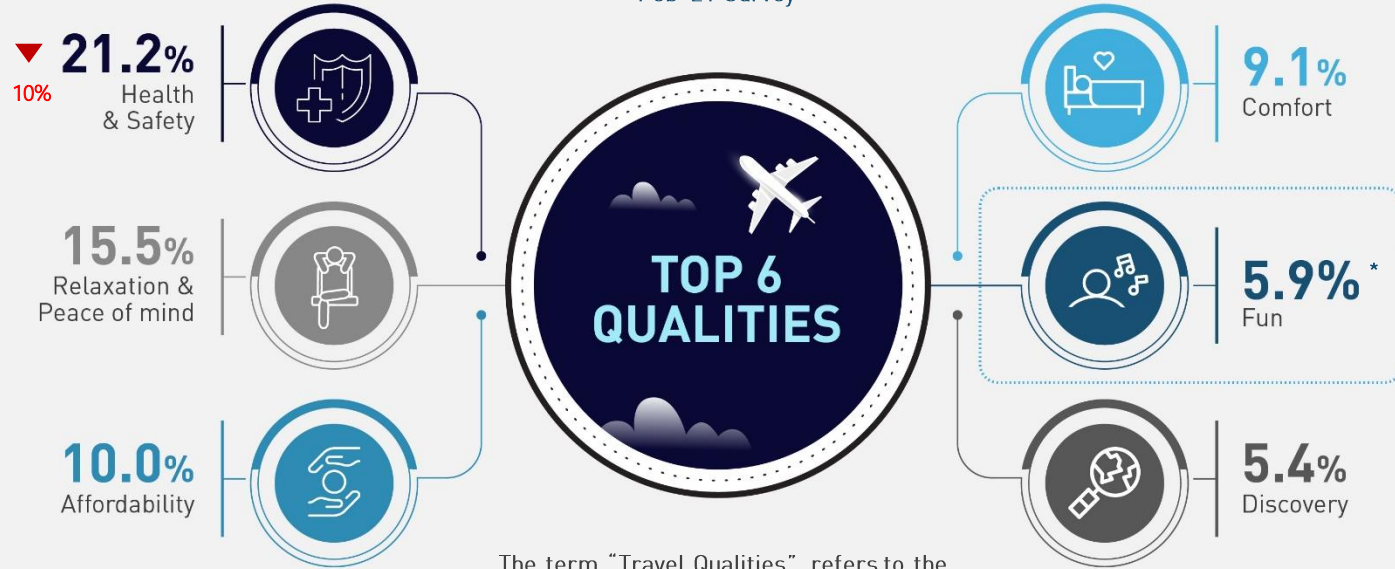
Hotel chains/ resorts  
are popular among  
business travellers  
(36%) and sun & beach  
travellers (35%)

\* 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



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



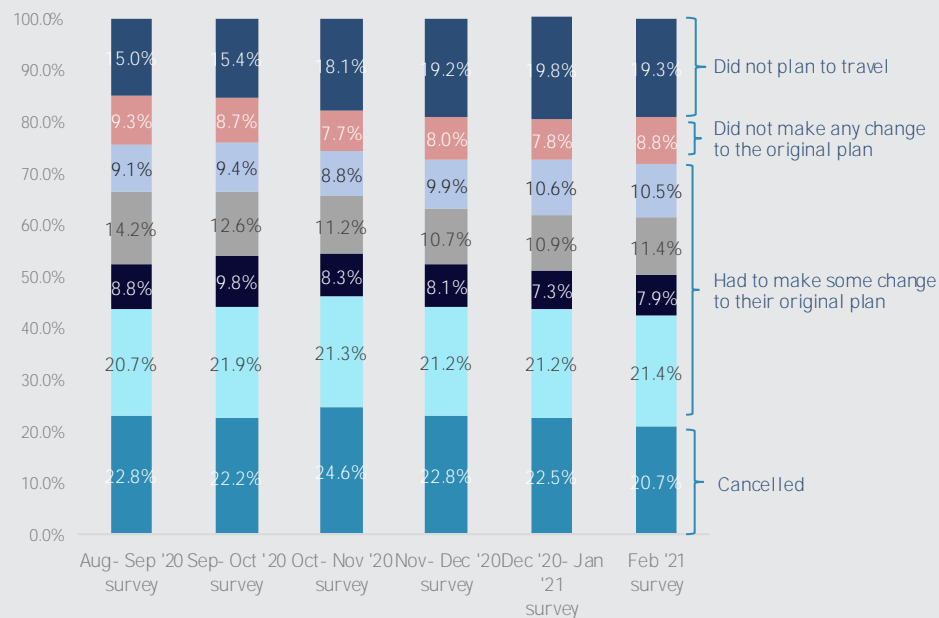
# TRAVEL CONCERNS

03



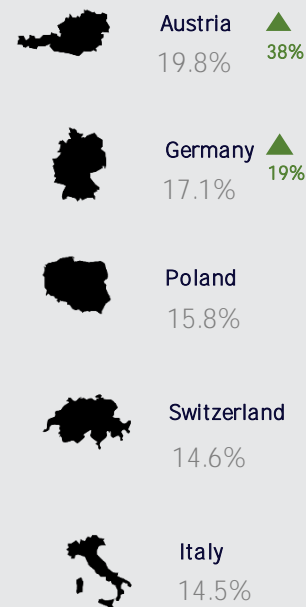
## Despite Europe-wide efforts, travellers still face challenges sticking to their original plans. The majority shared that they had to reschedule or change their destination

How has COVID-19 affected travel plans



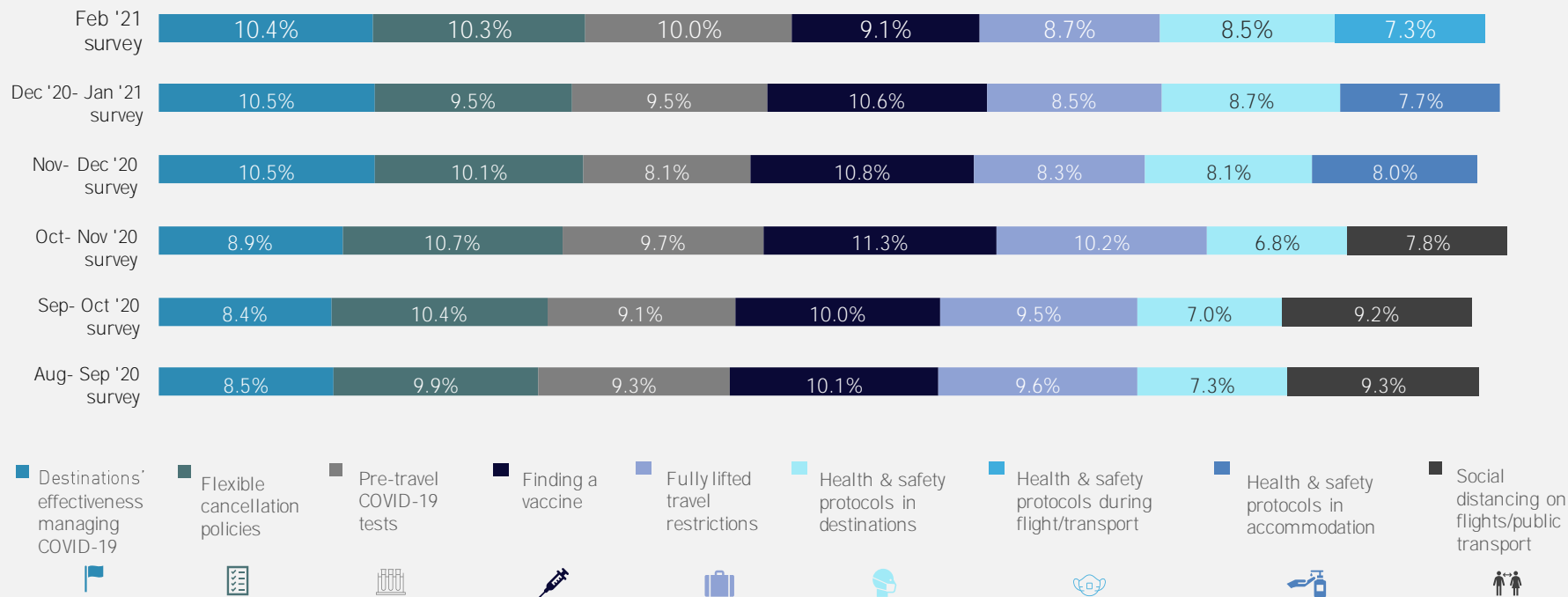
- I cancelled my trip completely
- I rescheduled it for another date
- I changed the destination so I can use my own vehicle to travel
- I changed my trip from international to domestic
- I made the trip with some changes from the initial planning
- It did not affect me at all
- I had not planned any overnight trips in the next 6 months

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



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

Most important factors to travel within Europe



\* 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

**15.6%**  
Quarantine measures during my trip



**12.0%**  
Becoming ill at the destination



**9.5%**  
Changes in travel restrictions to and from my country during my trip



**7.1%**  
Booking and cancellation policies



**14.1%**  
Rising COVID-19 cases in the destinations I want to visit



**9.6%**  
Limited options at the destination (closed restaurants /bars, etc.)



**9.4%**  
Becoming ill in transit



**5.8%**  
Transport and accommodation safety measures

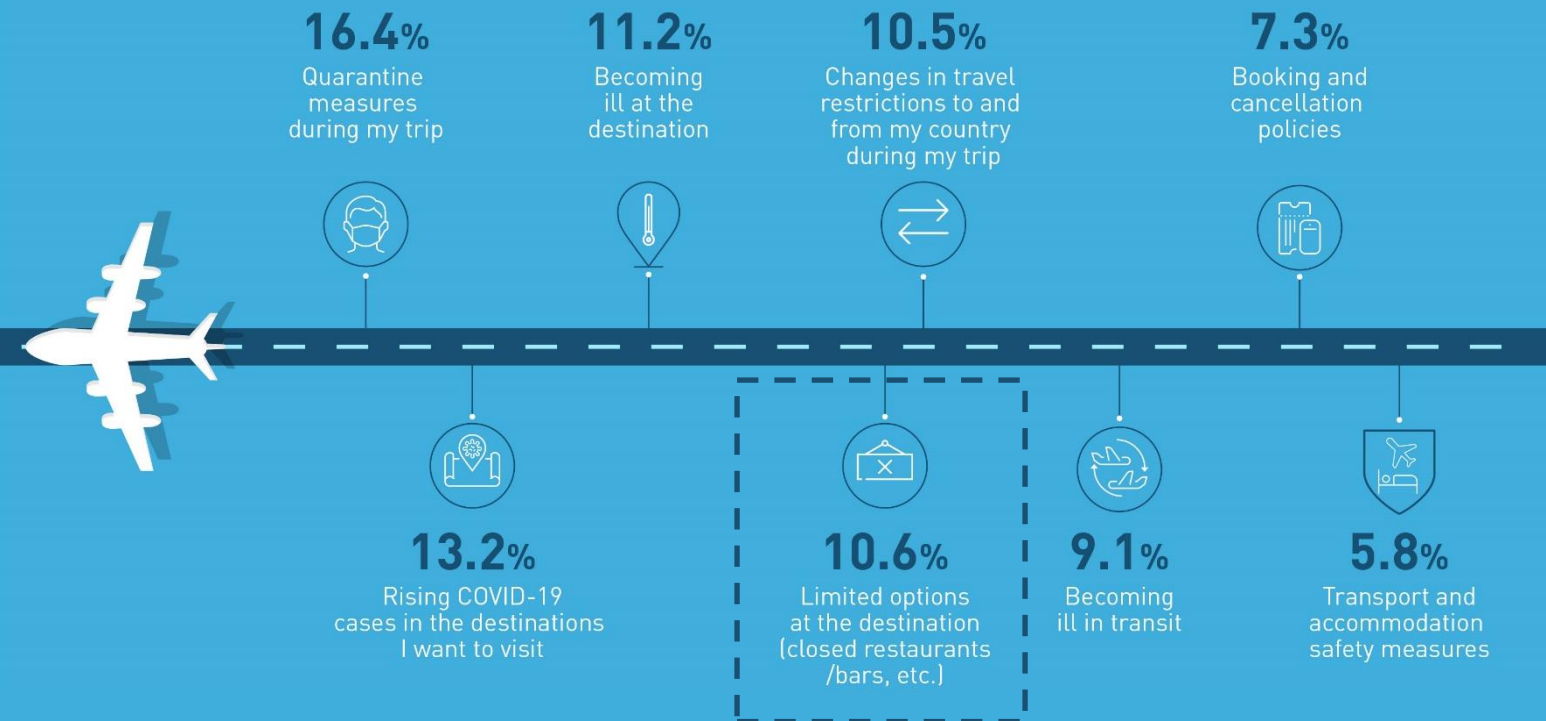


Compared to other age groups, respondents **over the age of 55** are slightly more concerned about the **rising COVID-19 cases** and **becoming ill at the destination**

# 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

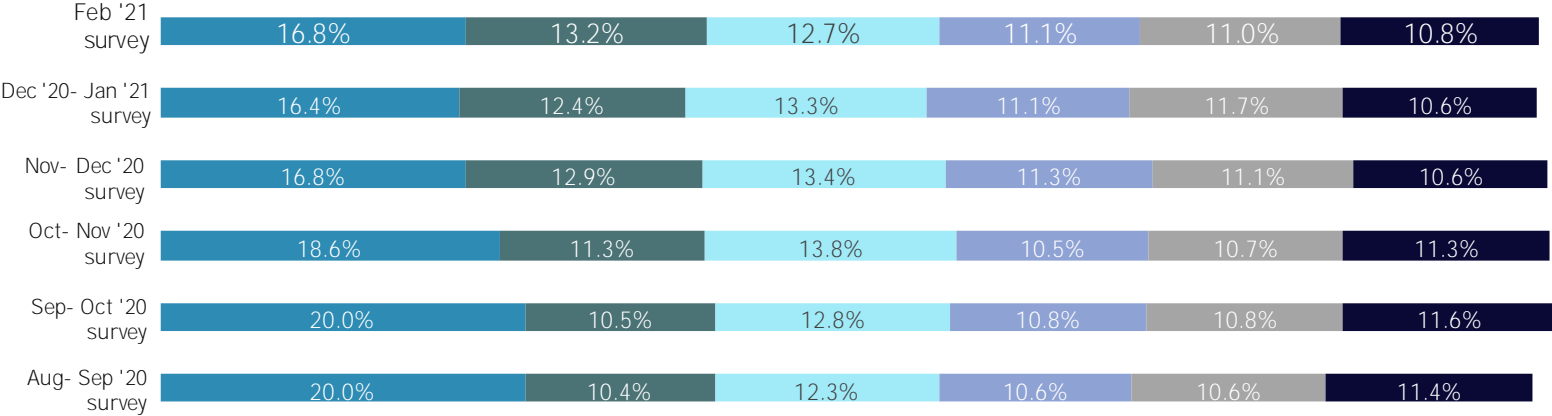
Leading concerns for those who are most likely to travel next



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



The most worrisome touch points during travel  
in relation to personal health & safety



Air travel



Food & beverage



In destination transport (metro, bus, taxi)



Accommodation – hotels and resorts

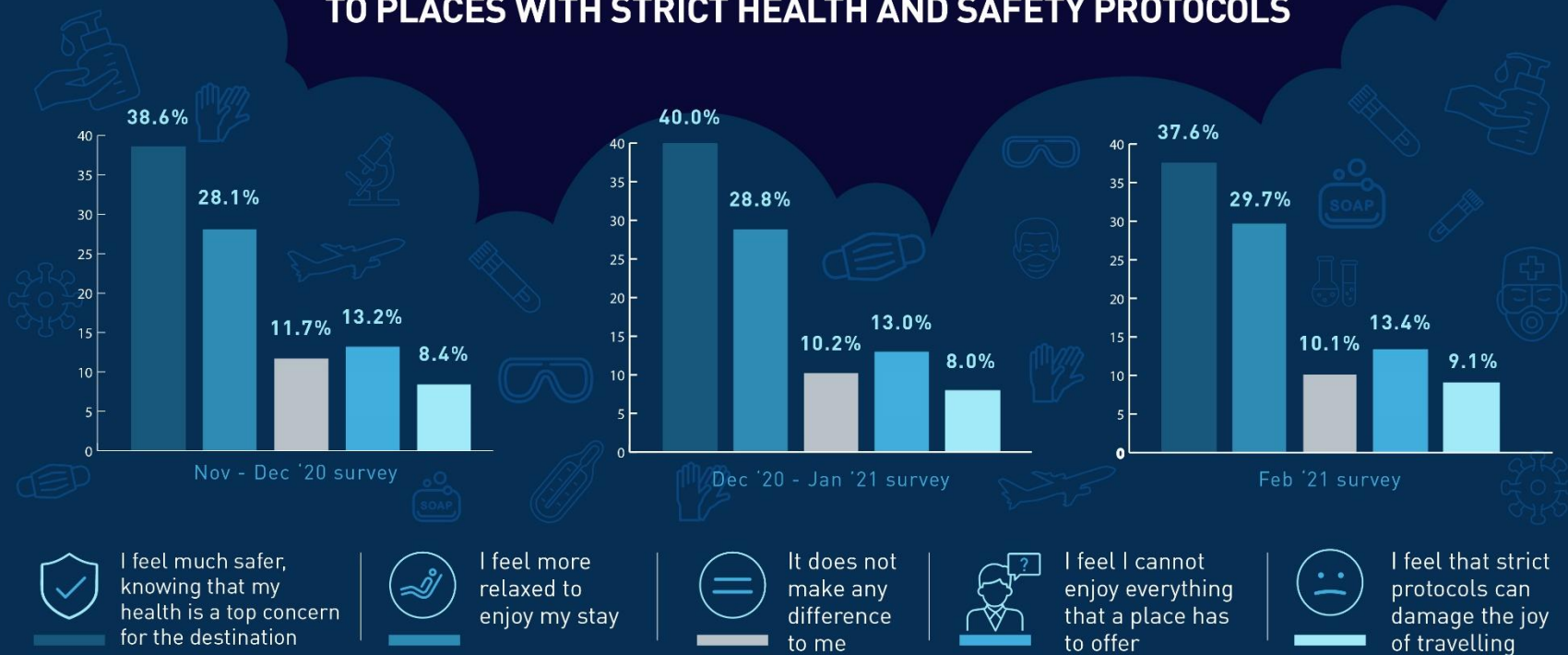


Public areas in destinations (i.e., streets, neighborhoods)



Attractions, tours and activities (i.e., museums, theme parks)

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

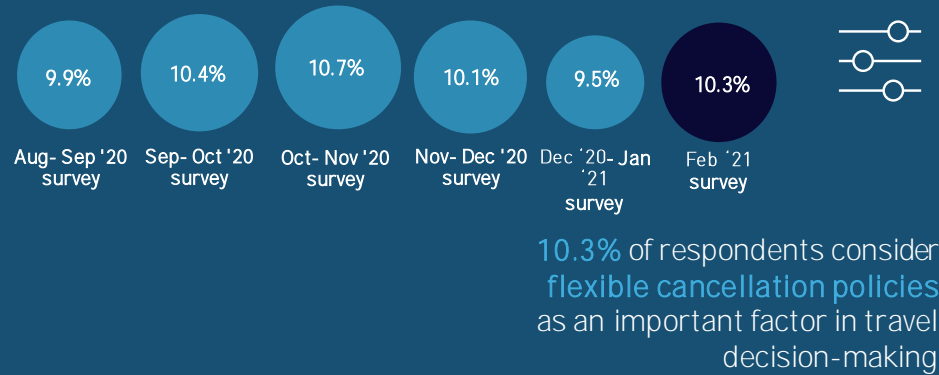


**Notes:**

- 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

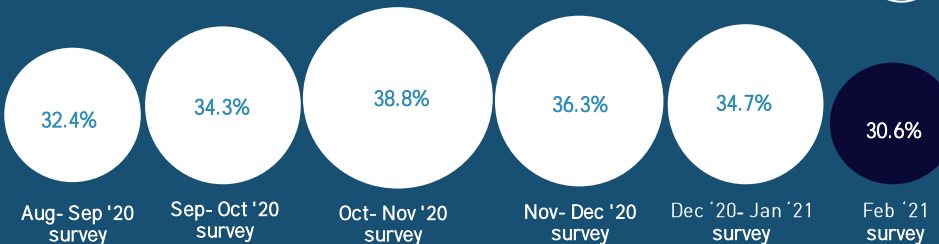
### 4 KPIs illustrating the level of uncertainty for domestic and intra-European travel



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



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



10% of respondents state that they do not know where they intend to travel to in the next 6 months



A person wearing a hat, a light-colored puffer jacket, and a backpack is walking away from the camera down a narrow, cobblestone street in a European city. They are pulling a black rolling suitcase. The street is flanked by old stone buildings. The overall color palette is blue and grey, with a white text overlay on the left and a large white number '04' on the right.

# 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: **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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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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