LONG-HAUL TRAVEL BAROMETER

METHODOLOGICAL NOTE

The Long-Haul Travel Barometer (LHTB) captures people's intention to travel to medium to long distance destinations, their motivations and barriers to travel, as well as key characteristics of their trip. Results of the LHTB are based on a survey focuses on five key outbound markets for Europe: Canada, China, Japan, the Russian Federation and the USA. The survey is meant to gauge travellers' attitudes and intentions, and is not meant to quantify prospect demand levels. The large sample size guarantees robust results.

Availability

Detailed results are only available to the members of partner organisations.

Partners

- European Travel Commission - project owner
- Eurail Group G.I.E. – project partner
- TCI Research - project consultant

Measurement

The main variable of interest is the measurement of the intention[1] to travel (behavioural intention), as an antecedent to actual behaviour.

Intention to travel is measured by the means of a unipolar, continuous rating scale[2] (or slider scale) (0-100), as to avoid major limitations associated with categorical scales (see Treiblmaier & Filzmoser, 2009: 5).

Long-Haul Travel Sentiment Index Calculation

The index calculation follows a direct approach allowing the reflection of the dominant sentiment among a representative sample of each market towards the intention to travel: optimism or pessimism.

The Long-Haul Travel Sentiment Index is tied to waves conducted in 2014/2015 (Waves 1, 2, 3). The index is calculated by taking a Long-Haul Travel Sentiment Score for a survey period divided by the corresponding value

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[1] Following the Theory of Planned Behavior (Ajzen, 1991), intention is conceived as the cognitive representation of a person's readiness to perform a given behavior.

[2] Evidence suggests that a higher number of categories is associated with higher validity, and that unipolar scales positively impact on validity in a multicultural context (see Thomas et al., 2004).

and multiplying this by 100. The index expresses the evolution of travel sentiment <u>to Europe</u> in the next 4 months period compared to the corresponding period of reference to eliminate the seasonality effect.

> *Example:*
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> *Score for European travel sentiment of US respondents as of August 2015 = 121.5*
> *Score for European travel sentiment of US respondents as of August 2014 = 114.0*
> *Long-Haul Travel Sentiment Index: 121.5 / 114.0 x 100 = 106.6*

The Long-Haul Travel Sentiment Score is calculated by subtracting the % of respondents responding negatively on the intention to travel to Europe (slider marks: 0 to 29) from the % of respondents who have a positive score (slider marks: 70 to 100) and adding 100 to the calculation. A value above 100 means that a higher percentage of respondents are positive about their intentions to travel to Europe than those feeling negatively. Each survey period is treated separately from each other.

> *Example (on total base):*
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> *% of US respondents indicating a positive intention to travel to Europe (marks 70 to 100) = 24.4%*
> *% of US respondents indicating a negative intention to travel to Europe (marks 0 to 29) = 2.9%*
> *Long-Haul Travel Sentiment Score: 24.4 - 2.9 + 100 = 121.5*

The Long-Haul Travel Sentiment Score for each subsequent period is divided by the score of the corresponding wave conducted in 2014/2015, thereby providing a trend line showing changes over time considering the same period to eliminate the seasonality.

Regions

For the markets Canada, China, Japan and USA, the survey captures intention to travel outside respondents' region of residence as specified below:

CANADA: a trip outside North America (i.e. not to USA, Canada and Mexico).

CHINA: a trip outside Eastern Asia (i.e. not to China, Japan, Hong Kong, Macao, Rep. of Korea, Democratic People's Republic of Korea, Mongolia, Guam and North Mariana Protectorate, Vietnam, Taiwan, Thailand, Indonesia, Malaysia Philippines and Singapore).

JAPAN: a trip outside Eastern Asia (i.e. not to Japan, China, Hong Kong, Macao, Rep. of Korea, Democratic People's Republic of Korea, Mongolia, Guam and North Mariana Protectorate, Vietnam, Taiwan, Thailand, Indonesia, Malaysia, Philippines and Singapore).

USA: a trip outside North America (i.e. not to USA, Canada and Mexico).

For the market Russia, the survey captures intention to travel abroad as specified below:

RUSSIA: a trip outside the Commonwealth of Independent States (i.e. not to Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Uzbekistan).

Questionnaire

The survey is conducted by the means of an online questionnaire. Standard questionnaires are used in each market, translated into the most widely spoken local language.

Representative sample

A stratified sample is used to represent the travel population in each market.

A sample size of 1,000 interviews guarantees reliable data at aggregate level. The confidence interval associated with each question's sample size is reported in the data file.

Schedule

Fieldwork for the 4-month survey is performed in the central two weeks of the month before the period of reference (January, May and December).The fieldwork is scheduled to perform interviews before major holiday periods in each market. Questions that are asked only on an annual basis are included in the questionnaires in December.

References

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