

## Annex A

---

# Monitoring Travel Sentiment in Long-Haul Markets

## Long-Haul Travel Sentiment Survey & Index

### Methodological Note

The Long-Haul Travel Sentiment Survey & Index (LHTSI) capture people's intention to travel to long-distance destinations, their motivations and barriers to travel, and key characteristics of their trip. Results of the LHTSI are based on a survey focusing on six key outbound markets for Europe: Australia, Brazil, Canada, China, Japan, and the USA. The survey is meant to gauge travellers' attitudes and intentions and not 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
- European Commission -project partner

### Measurement

The main variable of interest is the measurement of the intention<sup>1</sup> to travel (behavioural intention), as an antecedent to actual behaviour.

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

Below is an example of the slider used by the survey respondents to answer whether they intend to travel long-haul travel in the next four/twelve months

---

<sup>1</sup> Following the Theory of Planned Behavior (Ajzen, 1991), the intention is conceived as the cognitive representation of a person's readiness to perform a given behaviour.

<sup>2</sup> 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).

#### European Travel Commission

Rue du Marché aux Herbes  
61, 1000 - Brussels, Belgium  
Tel: +32 2548 90 00  
[www.etc-corporate.org](http://www.etc-corporate.org)

**EUROPEAN  
TRAVEL  
COMMISSION**

Please, use the slider below to express your opinion at your best.



## 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, and multiplying this by 100. The index expresses the evolution of travel sentiment to Europe in the next 4/12 months period compared to the corresponding period of reference to eliminate the seasonality effect.

### Example:

*Score for European travel sentiment of US respondents in December 2023 = 114.3*

*Score for European travel sentiment of US respondents in December 2014 (base year) = 111.8*

*Long-Haul Travel Sentiment Index:  $114.0/111.8 \times 100 = 102.3$*

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 40) by the % of respondents who have a positive score (slider marks: 60 to 100) and adding 100 to the calculation. In addition:

- Among respondents responding positively, a stronger weight is added to those placing the slider between 70-100 (65% weight) and a little less weight on those placing the slider between 60-69 (35%)
- Among respondents responding negatively, a stronger weight is added to those putting the slider between 0-29 (65%) and a little less weight on those placing the slider between 30-39 (35%)

A value above 100 means that a higher percentage of respondents are optimistic about their intentions to travel to Europe than those feeling negative. Each survey period is treated separately from the other.

### Example:

*% of US respondents indicating a **positive intention** to travel to Europe in 2024:*

*Slider at 70 to 100 = 27.5%*

*Slider at 60-59 = 9.2%*

*% of US respondents indicating a **negative intention** to travel to Europe in 2024*

*Slider at 0 to 29 = 8.8%*

*Slider at 30-39 = 3%*

*Long-Haul Travel Sentiment Score for 2024 =  $((27.5 \times 0.65) + (9.2 \times 0.35) - (8.8 \times 0.65) + (3 \times 0.35)) + 100 = 114.3$*

## European Travel Commission

Rue du Marché aux Herbes  
61, 1000 - Brussels, Belgium  
Tel: +32 2548 90 00  
www.etc-corporate.org

**EUROPEAN  
TRAVEL  
COMMISSION**

## Regions

The survey captures the intention to travel outside the respondents' region of residence as specified below:

**AUSTRALIA:** a trip outside Oceania (i.e. not to islands situated in the South Pacific Ocean, e.g. New Zealand, Papua New Guinea, Fiji, etc.)

**BRAZIL:** a trip outside South America (i.e. not to Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, French Guiana, Guyana, Paraguay, Peru, Suriname, Uruguay and Venezuela).

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

## Questionnaire

- The survey is conducted by means of an online questionnaire, with data collected via Computer Assisted Web Interview System (CAWI). Standard questionnaires are used in each market and translated into the most widely spoken local language.
- Topics covered in the questionnaire include, but are not limited to, the following: intention to travel long-haul and to Europe, barriers to travel, preferred travel period and destinations, envisaged length of stay and daily budget, perception of Europe, modes of transport to move from one country to another, the impact of events (e.g., inflation, extreme weather, etc.) on travellers' sentiment and choice.

## 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 an aggregate level. The confidence interval associated with each question's sample size is reported in the data file.
- The sample audience consists of consumers over 18 years of age

---

### European Travel Commission

Rue du Marché aux Herbes  
61, 1000 - Brussels, Belgium  
Tel: +32 2548 90 00  
[www.etc-corporate.org](http://www.etc-corporate.org)

**EUROPEAN  
TRAVEL  
COMMISSION**

---

## Schedule

Fieldwork for the 4-month survey is performed in the first two weeks of the month before the period of reference:

### April wave:

- Data is collected at the beginning of April and delivered at the end of April.
- Results refer to travel horizon May-August (4 months horizon)

### August wave

- Data is collected at the beginning of August and delivered at the end of August.
- Results refer to travel horizon September-December (4 months horizon)

### December wave

- Data is collected at the beginning of December and delivered at the end of December/the beginning of January.
- Results refer to **two travel horizons**:
  - January-April (4 months horizon)
  - January- December (12 months horizon)

The fieldwork involves interviews before major holiday periods in each market. Questions that are asked only annually are included in the December questionnaires.

## References

- Ajzen, Icek (1991). "The theory of planned behaviour". *Organisational Behavior and Human Decision Processes* **50** (2): 179–211
- Ajzen, I. & Fishbein, M. (1980). Understanding attitudes and predicting social behaviour. Englewood Cliffs, NJ: Prentice-Hall.
- Fishbein, M. & Ajzen, I. (1975). Belief, attitude, intention, and behaviour: An introduction to theory and research. Reading, MA: Addison-Wesley
- Thomas, R. K., Terhanian, G., & Bayer, L. R. (2004, August). Behavioural intention measurement: International findings. In Proceedings of Sixth International Conference on Logic and Methodology (pp. 16-20).
- Treiblmaier, H., & Filzmoser, P. (2011). Benefits from using continuous rating scales in online survey research. Retrieved from: <http://www.statistik.tuwien.ac.at/forschung/SM/SM-2009-4complete.pdf>. Last retrieved: 15/01/2015.

---

### European Travel Commission

Rue du Marché aux Herbes  
61, 1000 - Brussels, Belgium  
Tel: +32 2548 90 00  
[www.etc-corporate.org](http://www.etc-corporate.org)

**EUROPEAN  
TRAVEL  
COMMISSION**

---