



## MONITORING SENTIMENT FOR DOMESTIC AND INTRA-EUROPEAN TRAVEL

WAVE 8 | 09/21

Co-funded by  
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EUROPEAN  
TRAVEL  
COMMISSION

# WAVE 8

## RESEARCH HIGHLIGHTS



This report monitors sentiment and short-term intentions for domestic and intra-regional travel within Europe and is the **8<sup>th</sup> wave of market research**<sup>1</sup> initiated in September 2020. Responses are collected from Europeans in 10 high-volume source markets, in light of the COVID-19 crisis.

- Travel sentiment remains high, with **68%** of Europeans planning to travel between July 2021 and January 2022.
- **The COVID-19 vaccine is key to tourism recovery:** half (50%) of Europeans plan to book a trip once vaccinated and over half (54%) confirm that the vaccine made them more optimistic and confident regarding travel.
- 57% of respondents strongly agree/agree that **the introduction of the EU digital COVID-19 certificate will facilitate travel planning.**
- When planning a trip, Europeans primarily desire **enjoying life in a relaxing environment (17%), escaping from routine (16%) and spending quality time with family or friends (14%).**

<sup>1</sup> The data collection and research methodology are detailed in the methodological annex (slide [44](#))

# WAVE 8

## RESEARCH HIGHLIGHTS



- Europeans' desire for leisure travel reached its highest share of all research waves over the summer months (72% of 'early-bird' travellers).
- 53% of Europeans planning to travel in the next 6 months aim to visit another European country – the highest level since September 2020. 56% of 'early-bird' travellers focused on July-September, while 37% plan to travel between October 2021 and January 2022.
- Europeans with short-term travel plans shared preferences for spending their next holiday out in the fresh air, whether on **sun & beach (23%)**, **coast & sea (15%)** or **nature & outdoors trips (13%)**.
- At the same time, an increasing number of respondents favour travelling by car (40%), while their preference for air travel dropped to its lowest point (46%) since September 2020, partially due to the strong interest in domestic travel (35%) and visiting neighbouring countries (30%).
- 1 in 3 of 'travel-ready' Europeans are planning a 4–6-night trip, and half will invest 500-1,500 euros on their next holiday. A third (34%) of them have chosen a destination, but not yet booked, and 29% have fully booked their next trip.

# WAVE 8

## RESEARCH HIGHLIGHTS

- Slowly adjusting to living alongside COVID-19, the share of respondents who refrained from planning a trip dropped to its lowest point (16%).
- The top 3 factors boosting travellers' confidence in planning a trip between October-November are getting vaccinated (37%), pre-travel COVID-19 tests (20%) and destinations' effectiveness in managing COVID-19 (20%).
- The most worrisome parts of a journey in relation to personal health and safety remain the air travel (17%), in-destination transport (15%) and food & beverage (13%).



# WAVE 8

## RECOMMENDATIONS FOR DESTINATIONS



- The strong link between vaccination and travel confidence endures. Destinations should maintain their focus on countries that top the vaccination uptake list and on age groups with a high share of fully vaccinated consumers\*.
- Destinations should further enhance strict health & safety protocols and **highlight their positive performance in limiting the spread of COVID-19** in response to travellers' acute concerns about destinations' COVID-19 case levels and effective management of the pandemic.
- With increasing interest in road trips and in outdoor holidays, destinations could co-create **themed intra-regional car routes based on visitors' interests** to help disperse visitor flows and build inter-regional tourism partnerships.
- Responding to Europeans' taste for 4-6-night city breaks, **urban destinations can promote in-depth experiences, such as local cultural events, multi-day workshops and day trips to nearby places** to attract longer stays that result in greater economic contributions.

# WAVE 8

## RECOMMENDATIONS FOR BUSINESSES



- Taking advantage of Europeans' positive travel sentiment, **businesses could offer early-bird deals for Q4 2021** that focus on driving-distance audiences and that have flexible booking terms.
- Businesses catering for families should highlight their offer as a way to **spend quality time together and re-connect**, while businesses focusing on couples should spotlight **romantic leisure time and enjoying life in a relaxing environment**.
- **Hotels should focus on short booking windows**, as 44% of 'early-bird' travellers have chosen where they want to go but have not yet booked their accommodation.
- **Utilising unsold room inventory through negotiating with carefully selected content creators** could be a way for independent hotels and resorts to further communicate their brand, provide engaging content and drive direct sales.
- In response to Europeans' concerns and declining interest in air travel, **aviation stakeholders should promote last-minute deals, flexible cancellation policies and the strict implementation of health & safety protocols at airports and in-flight**.



# CONTENTS

01.

TRAVEL  
INTENTIONS

P. 9

02.

TRIP  
PLANNING

P. 29

03.

TRAVEL  
CONCERNS

P. 37

04.

METHODOLOGICAL  
ANNEX

P. 43

# How to read

## Wave 8

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

	Wave 5	Wave 6	Wave 7	Wave 8
Surveys dates	18 Dec '20 – 7 Jan '21	5-19 Feb '21	19-29 May '21	13-23 July 2021

2. To present Wave 8 timings in which respondents are most likely to take their next trip, the following time periods should be used as a reference:
  - This month; July 2021.
  - In 1-2 months; August – September 2021.
  - In 3-4 months; October – November 2021.
  - In 5-6 months; December 2021 – January 2022.
3. To present data and insights, the following distinct groups have been analysed:
  - Total respondents; 5,778
  - Respondents with short-term travel plans/most likely to travel in the next 6 months ('early-bird' travellers/'travel-ready' Europeans); 3,923
  - Respondents selecting outbound European destinations; 4,003
4. Significant changes between current and previous waves refer to >2.5% in the overall/ 'early bird' sample, and >5% in the countries' sample. Some of these changes were marked using the following symbols:
  - 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. All data and insights refer to domestic and intra-European travel, unless otherwise stated.



# TRAVEL INTENTIONS





01

## Despite the Delta variant, travel intention remains high: 68% of Europeans plan to travel within the next 6 months

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

 Poland  
79.0%

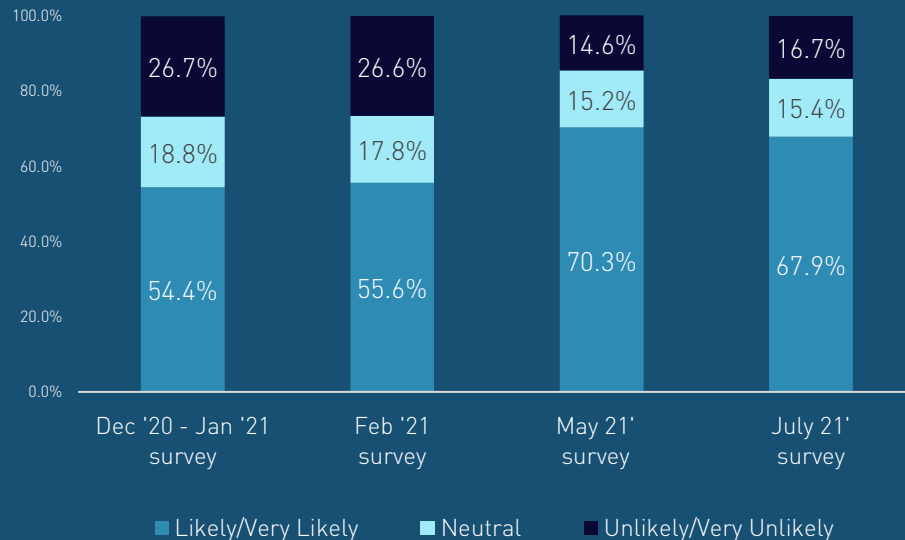
 Spain  8%\*  
73.0%

 Germany  9%\*  
72.5%

 Italy  
72.5%

 Austria  
70.8%

Intention to travel in the next 6 months



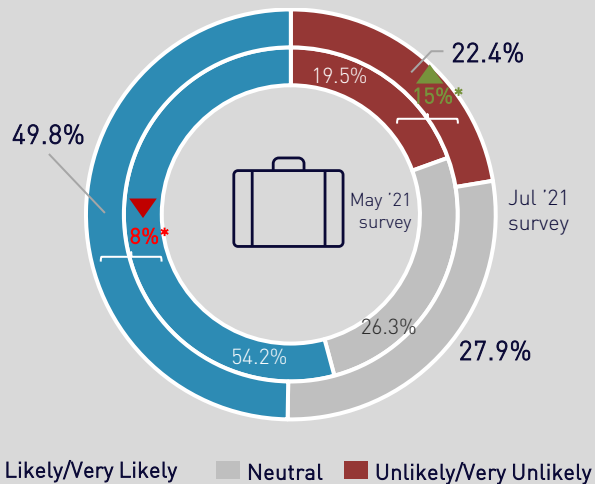
\* % change vs previous survey period

No. of respondents: 5,778

# The COVID-19 vaccine is still key to travellers' confidence and booking behaviour, yet it no longer has a great assurance effect

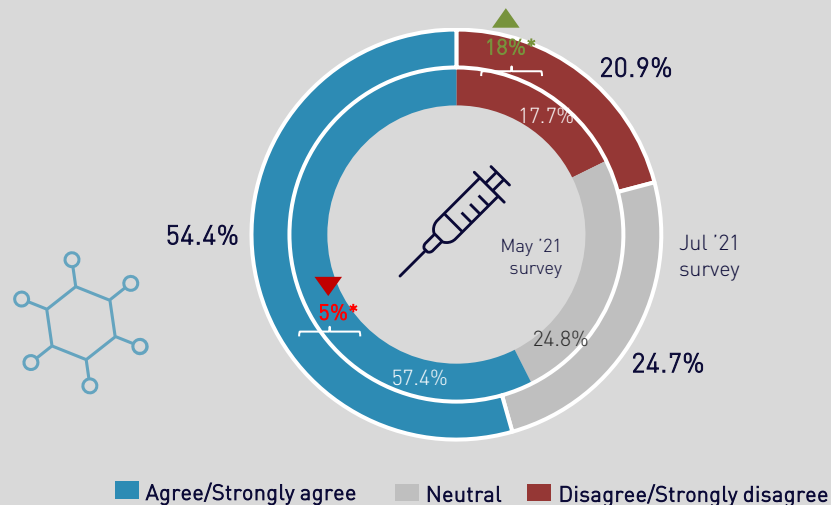


Europeans planning to book a trip once vaccinated



Q7. To what extent do you agree/ disagree with the following statement: "Once I'll get vaccinated for COVID-19, I would soon book a trip".

COVID-19 vaccine rollout supports travellers' confidence



Q8. To what extent do you agree/ disagree with the following statement: "Now that a vaccine for COVID-19 has been rolled out, I feel much more optimistic and confident about planning trips in the next six months".

\* % change vs previous survey period

No. of respondents: 5,778

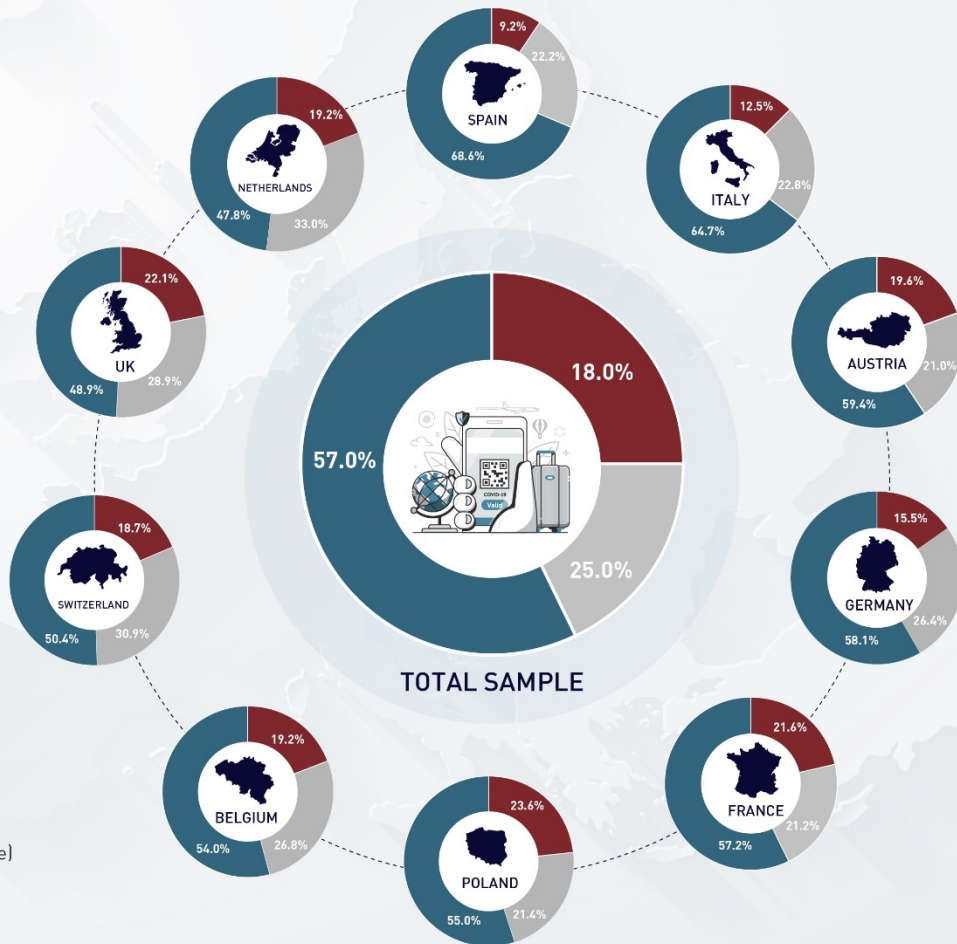
# TREND CONTINUES: OVER 50% OF EUROPEANS COUNT ON DIGITAL COVID CERTIFICATE TO EASE TRAVEL

Two-thirds of early-bird travellers deem the EU Digital COVID Certificate very important, although among respondents with no short-term travel plans, only one-third agree/strongly agree with the certificate's importance.

- Agree/Strongly agree
- Disagree/Strongly disagree
- Neutral

Q9. To what extent do you agree/ disagree with the following statement: "The introduction of harmonised EU certificates (EU Digital COVID Certificate) to prove vaccination, COVID-19 recovery or testing status will facilitate travel/planning my next trip".

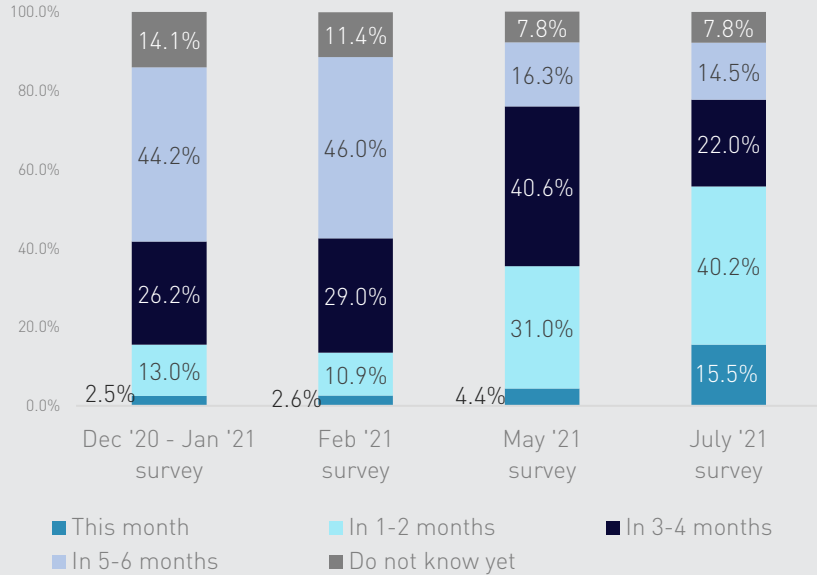
No. of respondents: 5,778



# Milder weather accelerates peoples' desire for an extended summer travel season.

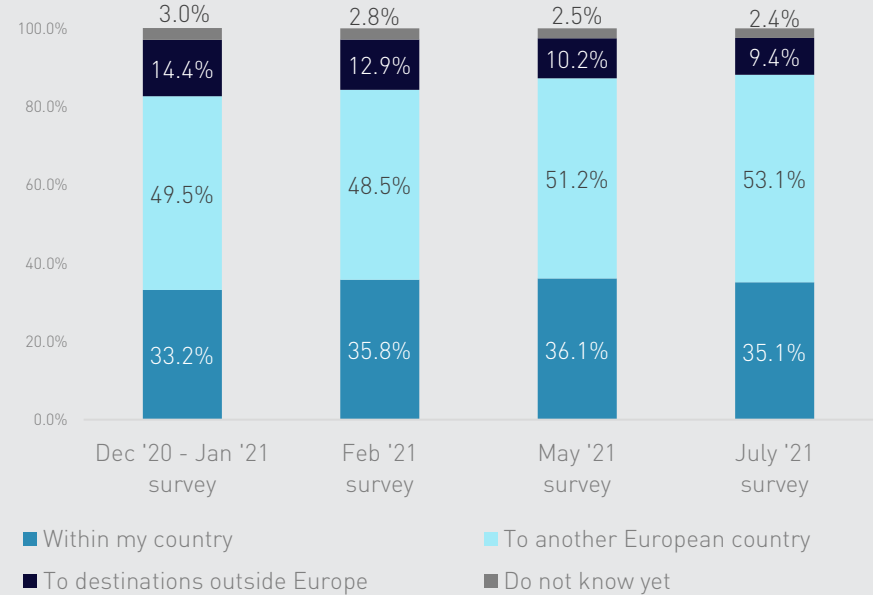
## 22% of 'travel-ready' Europeans plan to embark on a journey between September and November

When will Europeans travel next?



Q13. 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?



Q14. Where do you plan to travel in the next 6 months?

# PREFERRED COUNTRIES FOR FUTURE TRIPS

Mediterranean destinations and their sunny beaches topped Europeans' wish list for summer/autumn 2021

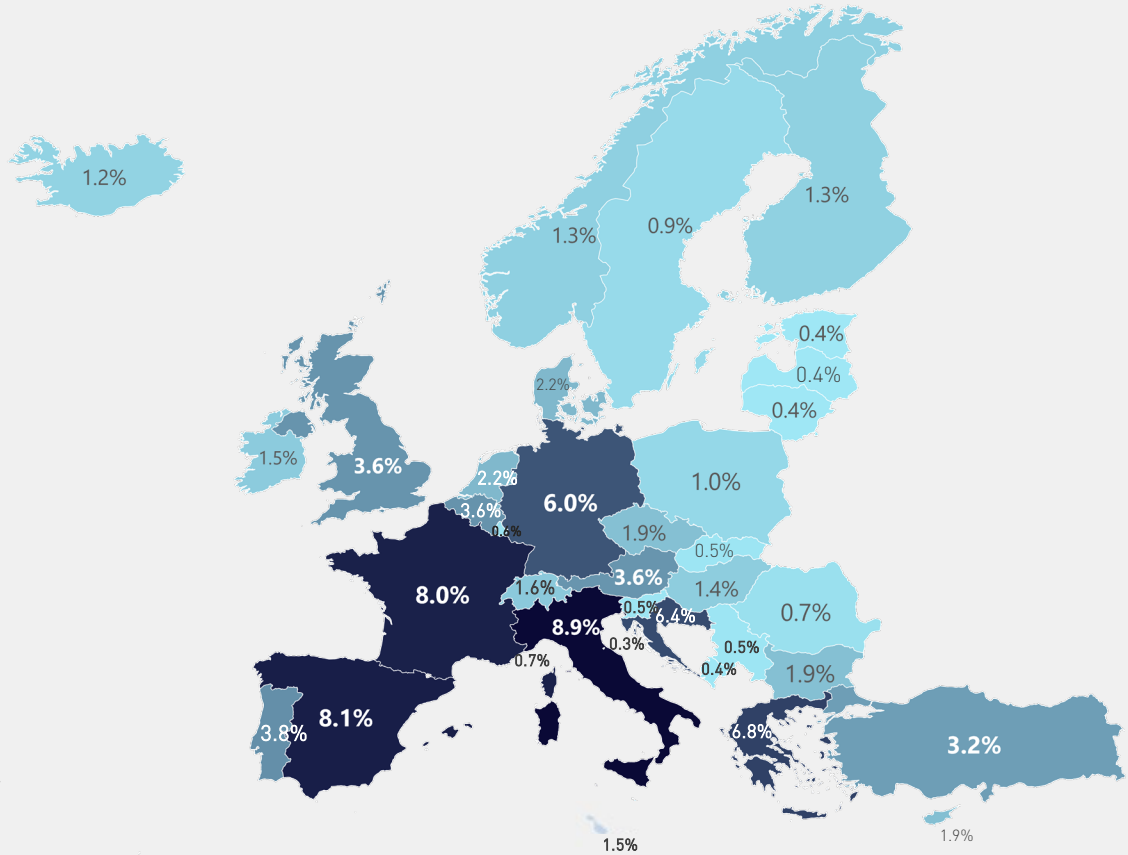
## TOP 10 COUNTRIES

Italy	8.9%	
Spain	8.1%	▼ 29%*
France	8.0%	
Greece	6.8%	
Croatia	6.4%	
Germany	6.0%	
Portugal	3.8%	
Belgium	3.6%	
United Kingdom	3.6%	
Austria	3.6%	

\*Please use this map as a reference only

No. of respondents: 4,003

Respondents [%] 0.3% 8.9%



# Summer is the time to unwind, when 72% of 'travel-ready' Europeans plan leisure trips



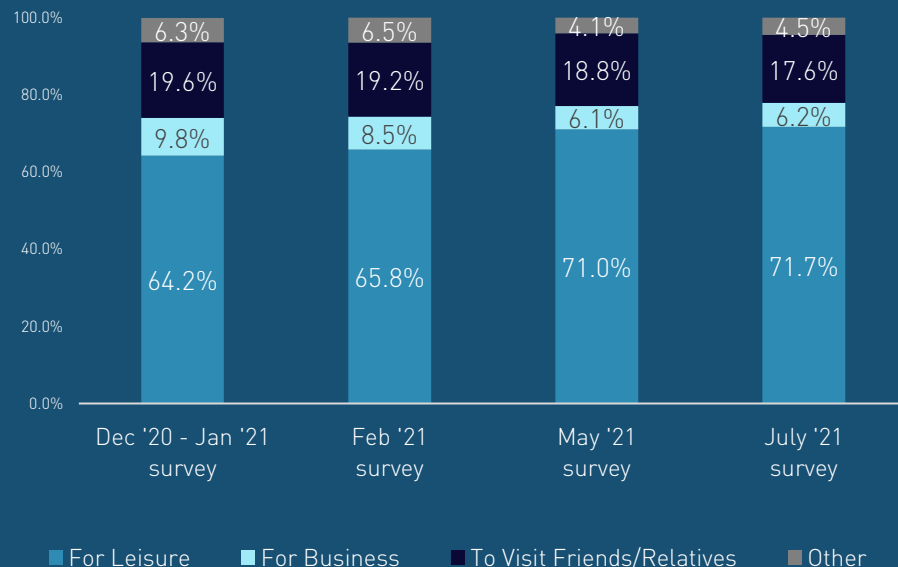
Top 3 markets to take a leisure trip



Top 3 markets to take a business trip



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



\* % change vs previous survey period

No. of respondents: 3,923

## Sea & beach holidays are the preferred holiday for 38% of 'early-bird' travellers

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



### Europeans are going after the sun:

Interest in sun & beach holidays peaked in July (25%) and remains popular through Oct-Nov (20%) and Dec '21-Jan '22 (21%), creating an opportunity for off-season travel to sunny destinations

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

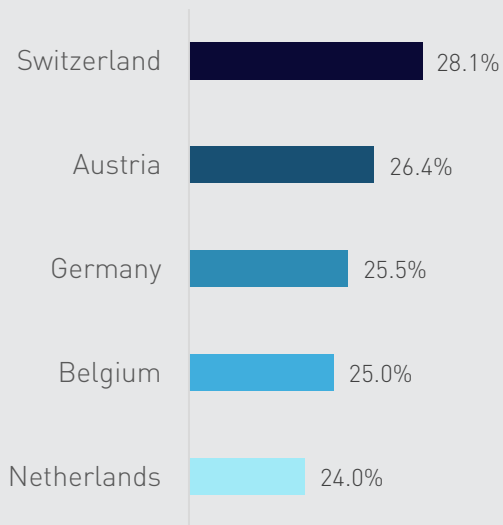


## Travellers from DACH countries\* are the most eager to take sun & beach trips

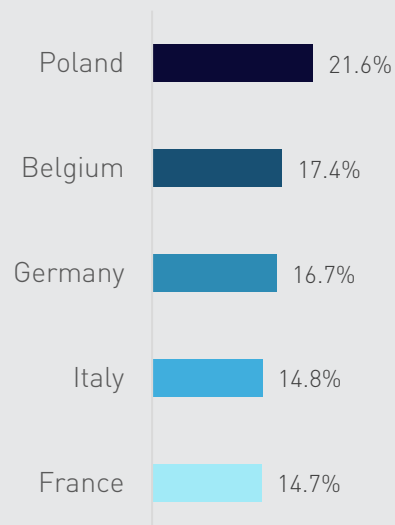
July '21 survey



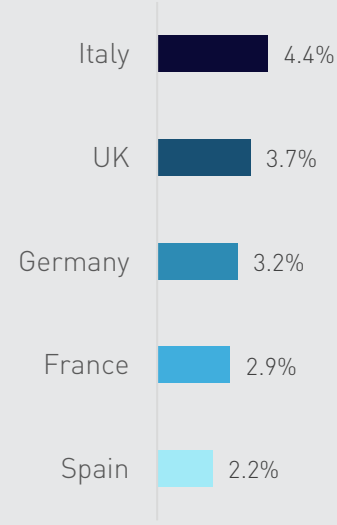
Sun & Beach



Coast & Sea



Cruising



How to read: Percentages indicate the share of respondents from each country interested in each type of leisure trip; i.e. 28.1% of respondents from Switzerland are most likely to undertake a sun and beach trip

No. of respondents: 5,778

\*The term 'DACH countries' refers to Germany, Austria and Switzerland

## Preferences for types of trips are similar to previous waves

July '21 survey



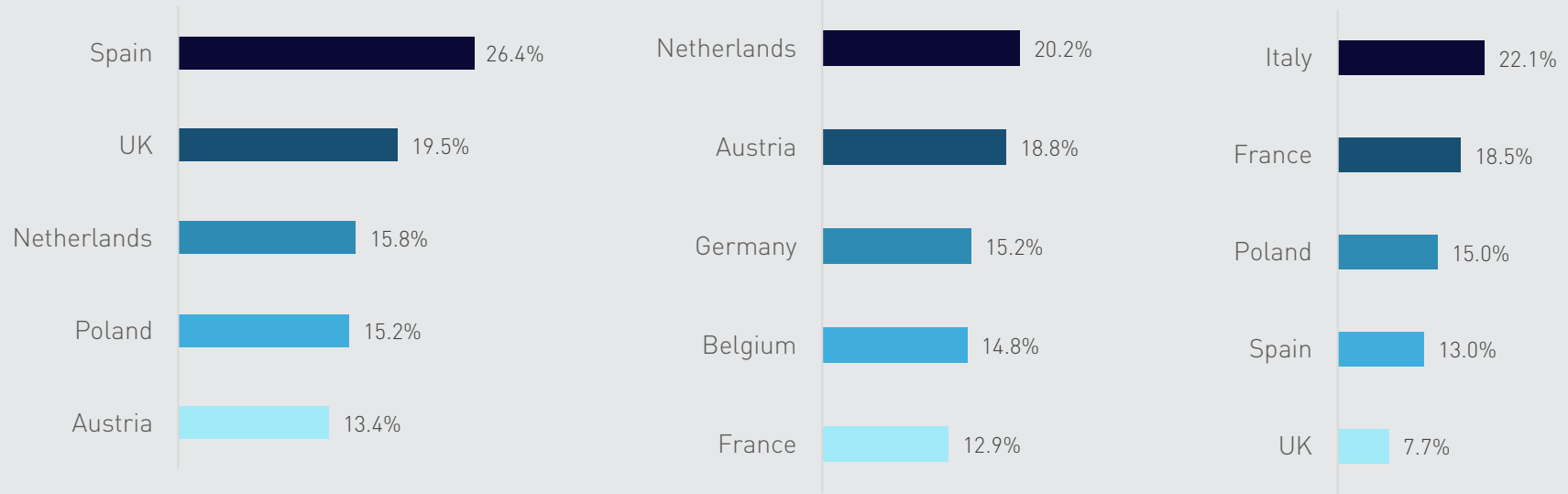
City Break



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. 26.4% of respondents from Spain are most likely to undertake a city break trip

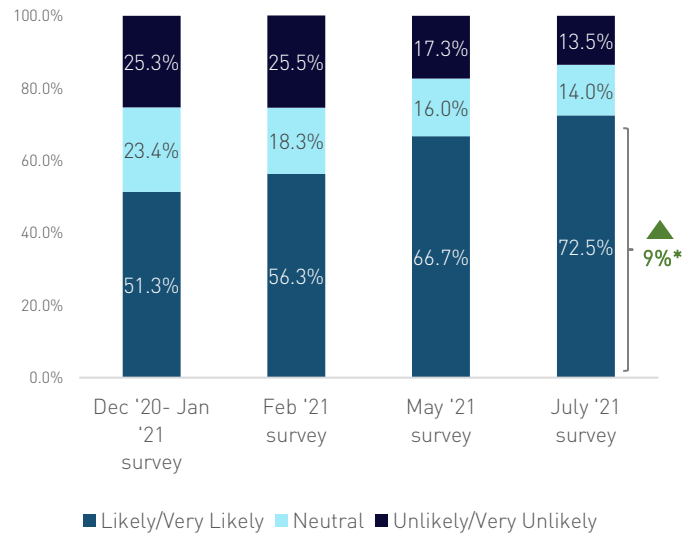
No. of respondents: 5,778

# GERMANY

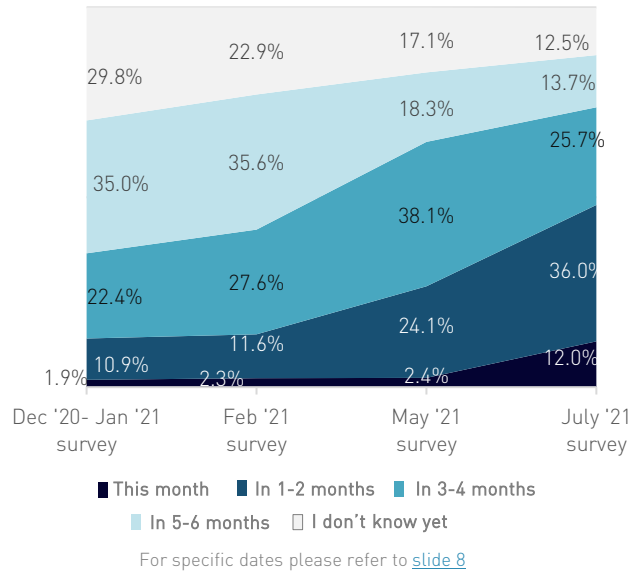
## Germans' travel intentions are on the rise (+9%); 1 in 4 respondents are planning a trip between October-November



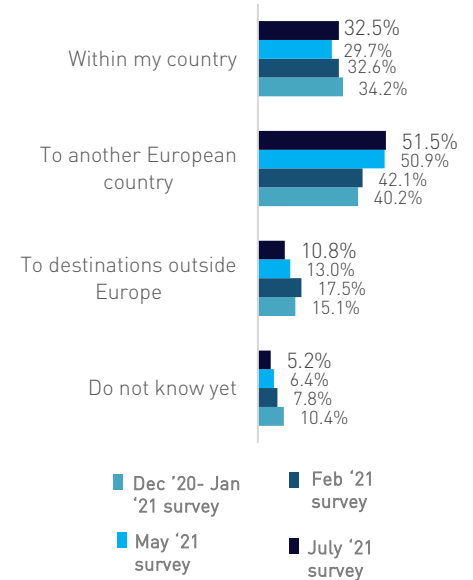
Willingness to travel in the next 6 months



When will Germans travel?



Where will Germans travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

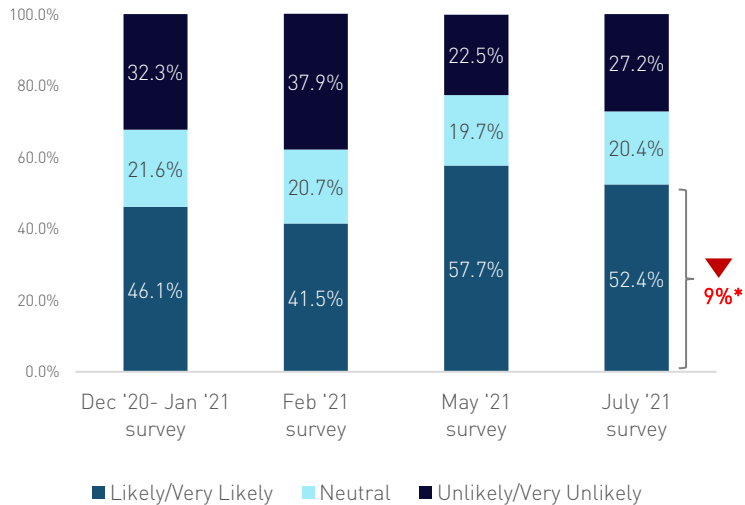
Q14. Where do you plan to travel in the next 6 months?

# UNITED KINGDOM

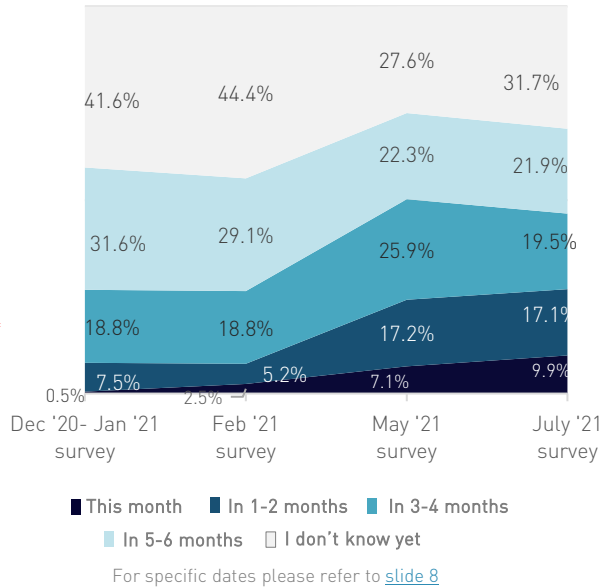
## Travel intentions decrease in the UK (-9%), perhaps due to the COVID-19 upsurge in UK coinciding with the survey period



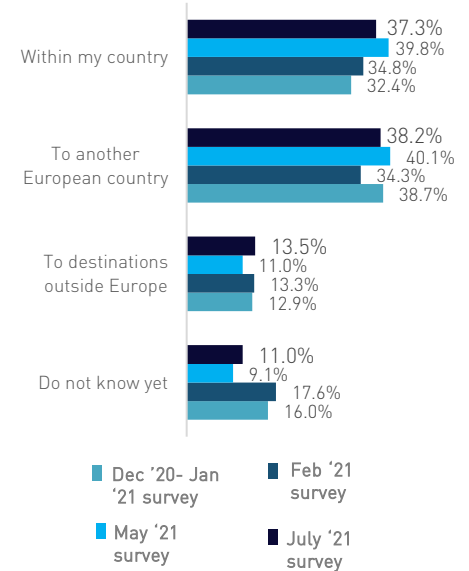
Willingness to travel in the next 6 months



When will the British travel?



Where will the British travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

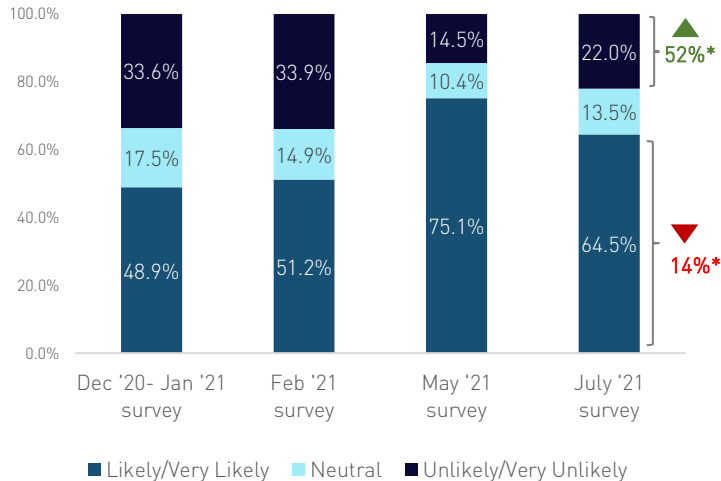
Q14. Where do you plan to travel in the next 6 months?

# FRANCE

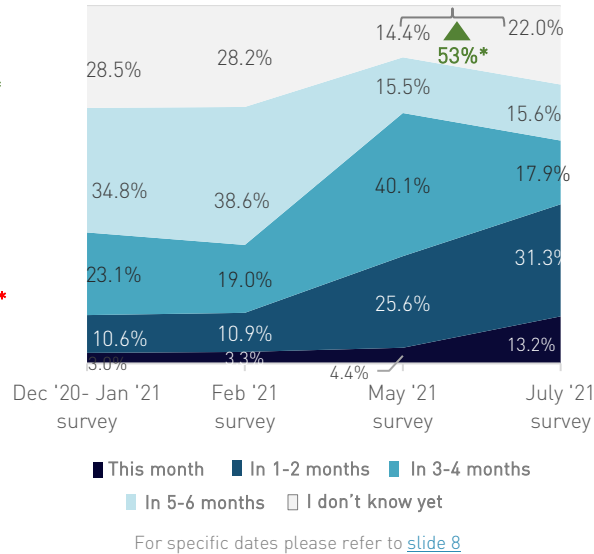
## French travel intention dropped by 14% and uncertainty regarding when to travel surged by 53%



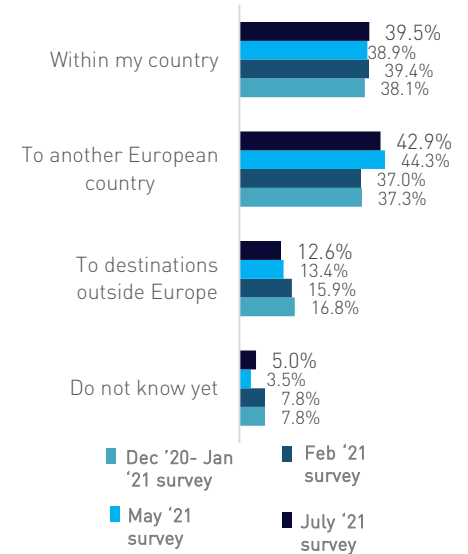
Willingness to travel in the next 6 months



When will the French travel?



Where will the French travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

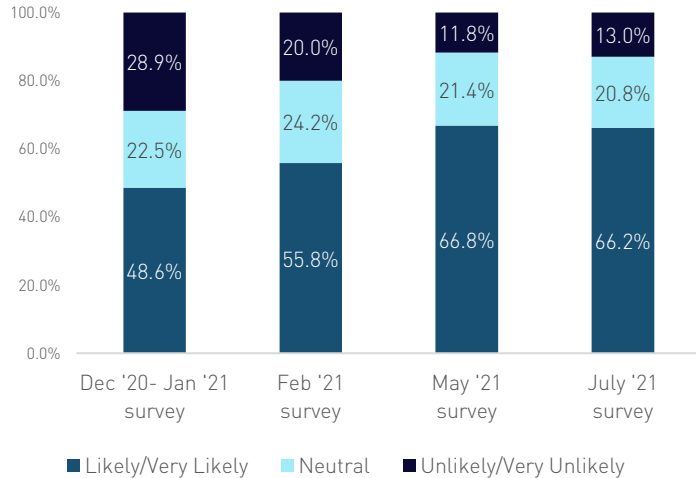
Q14. Where do you plan to travel in the next 6 months?

# THE NETHERLANDS

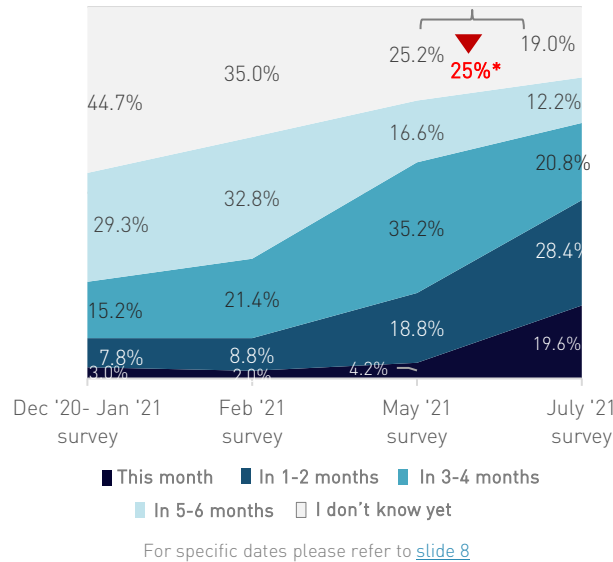
## Dutch travel sentiment remains positive, while uncertainty about when to travel drops by 25%, to its lowest point yet



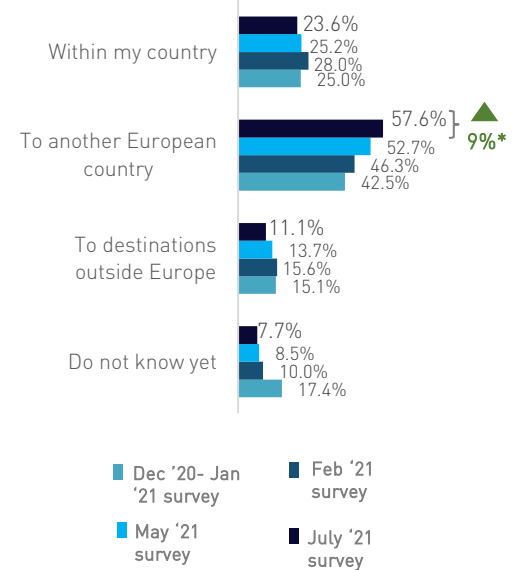
Willingness to travel in the next 6 months



When will the Dutch travel?



Where will the Dutch travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

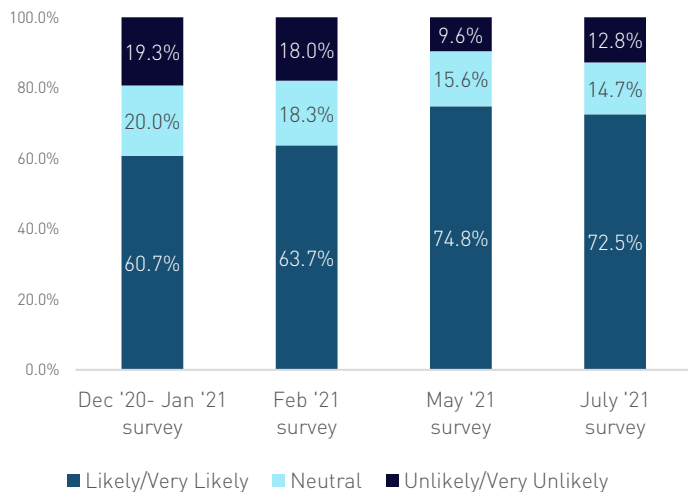
Q14. Where do you plan to travel in the next 6 months?

# ITALY

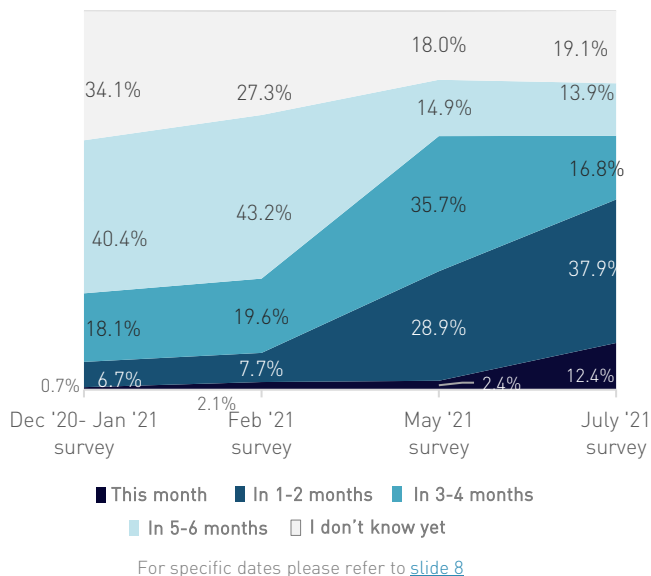
## Almost a third (31%) of Italians are planning to enjoy their own country between October 2021-January 2022



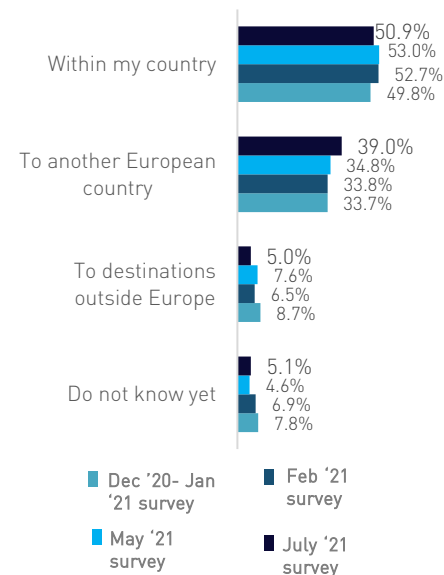
Willingness to travel in the next 6 months



When will Italians travel?



Where will Italians travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

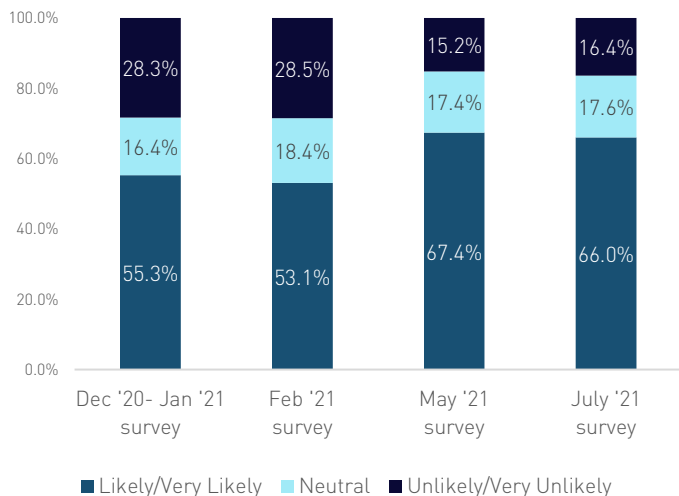
Q14. Where do you plan to travel in the next 6 months?

# BELGIUM

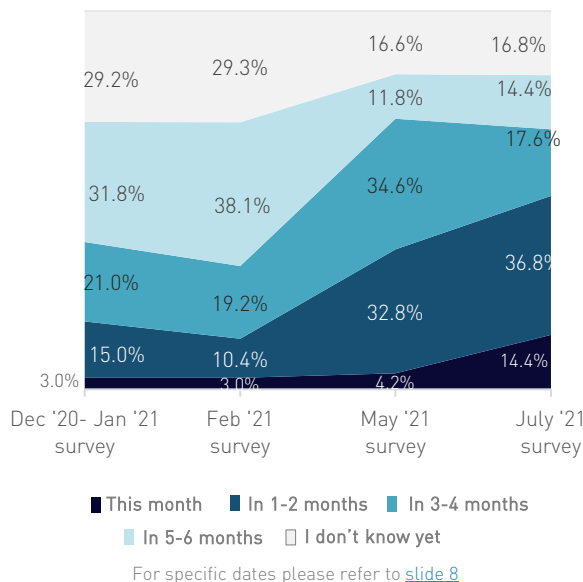
## 2 in 3 Belgians will travel by January 2022, with the majority (61%) being most interested in intra-European trips



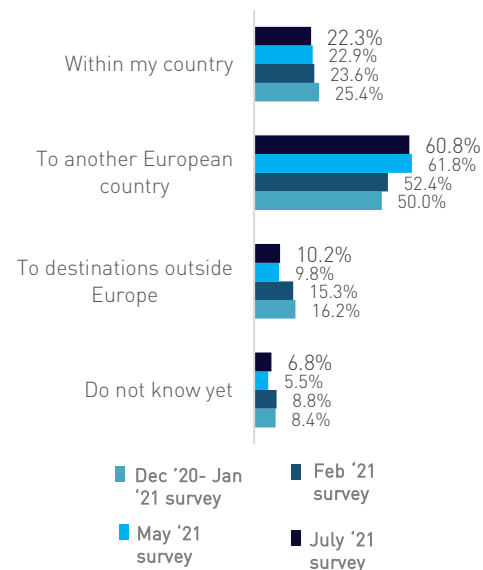
Willingness to travel in the next 6 months



When will Belgians travel?



Where will Belgians travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?

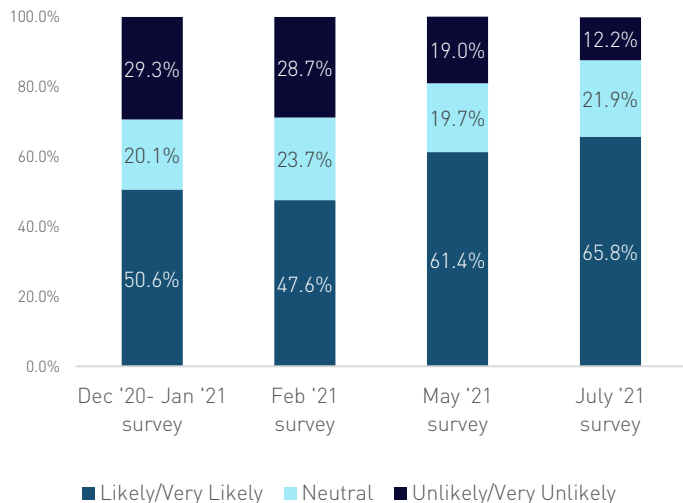


# SWITZERLAND

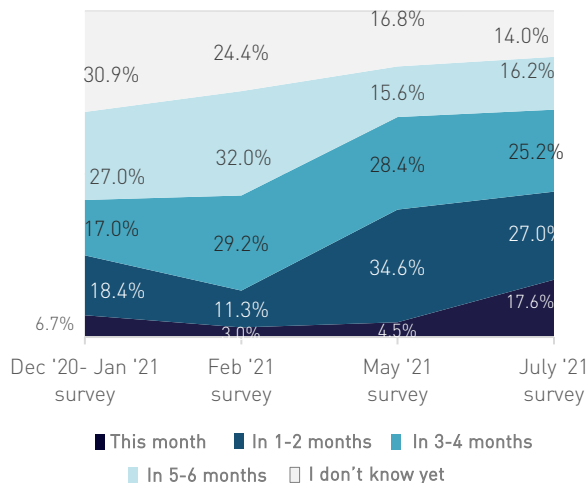
## Of all surveyed markets, Swiss travellers demonstrate the strongest interest in visiting another European country



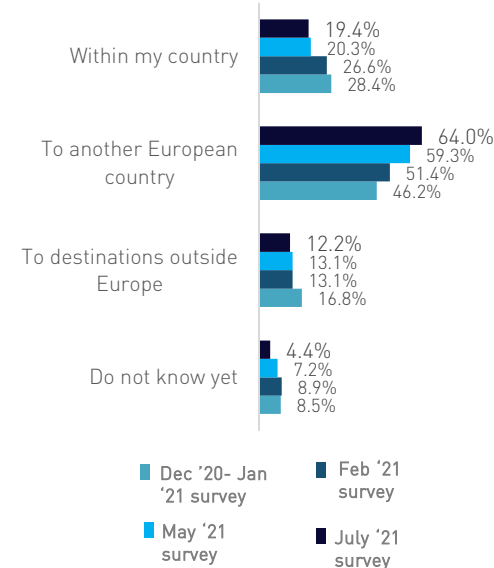
Willingness to travel in the next 6 months



When will the Swiss travel?



Where will the Swiss travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?

For specific dates please refer to [slide 8](#)

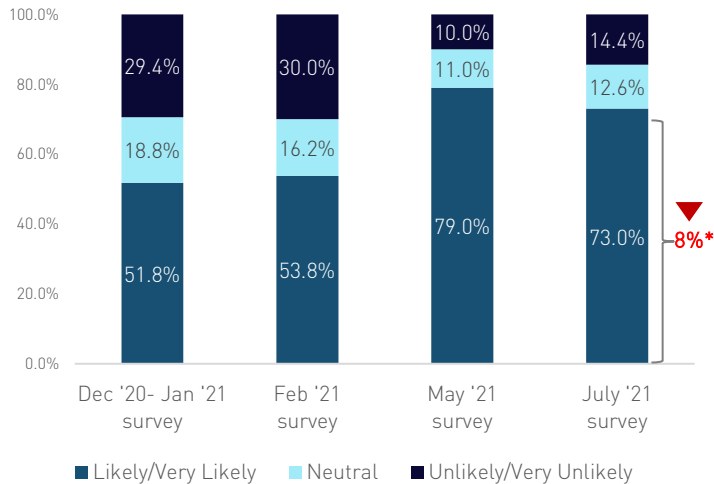
No. of respondents: 278 (total sample of respondents per country)  
Due to the limited sample size, results should be used as indicators

# SPAIN

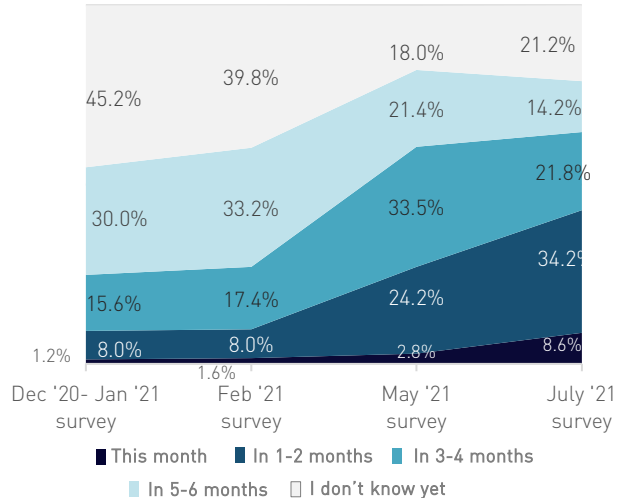
## Spanish travel intentions are among the highest of all respondents, with 50% of travellers planning domestic trips



Willingness to travel in the next 6 months

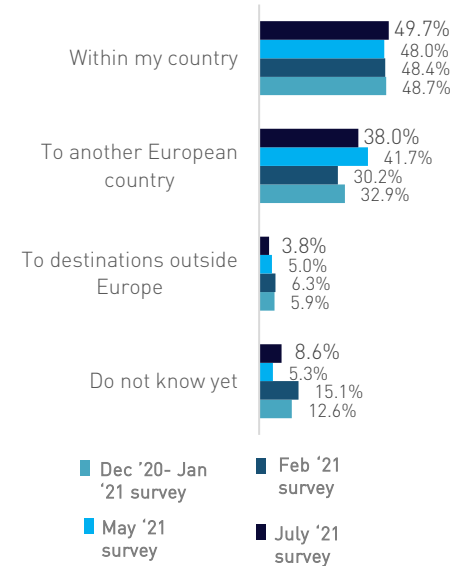


When will the Spanish travel?



For specific dates please refer to [slide 8](#)

Where will the Spanish travel within the next 6 months?



Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

Q13. When are you most likely to go on your next trip either in your country or within Europe?

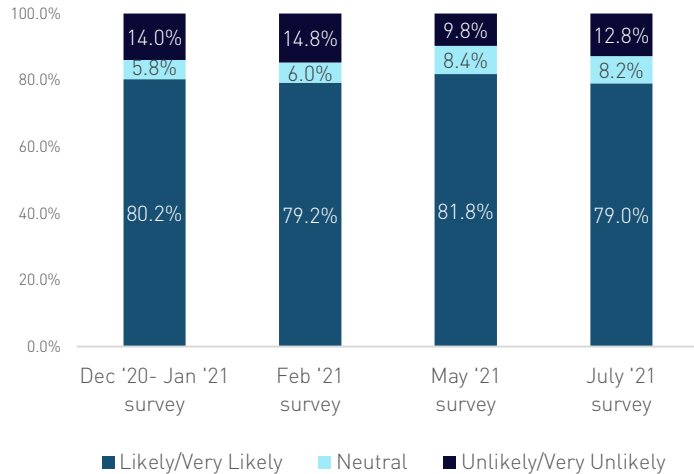
Q14. Where do you plan to travel in the next 6 months?

# POLAND

## Polish travellers remain the most eager to travel; one quarter are planning to take trips between October 2021 and January 2022

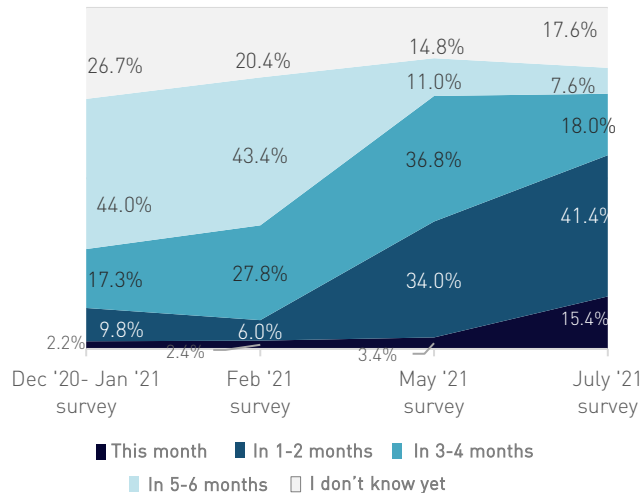


Willingness to travel in the next 6 months



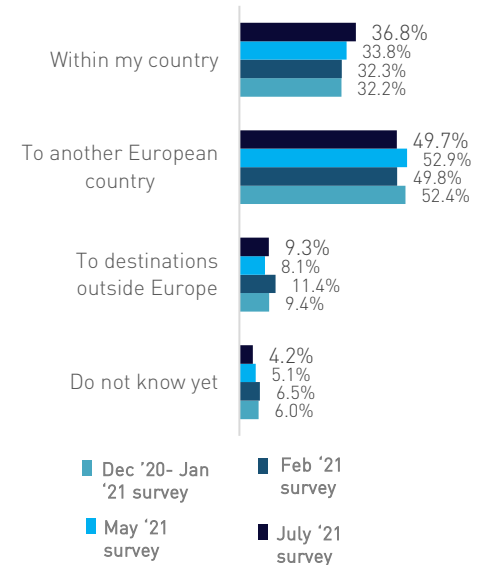
Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

When will the Polish travel?



Q13. When are you most likely to go on your next trip either in your country or within Europe?

Where will the Polish travel within the next 6 months?



Q14. Where do you plan to travel in the next 6 months?

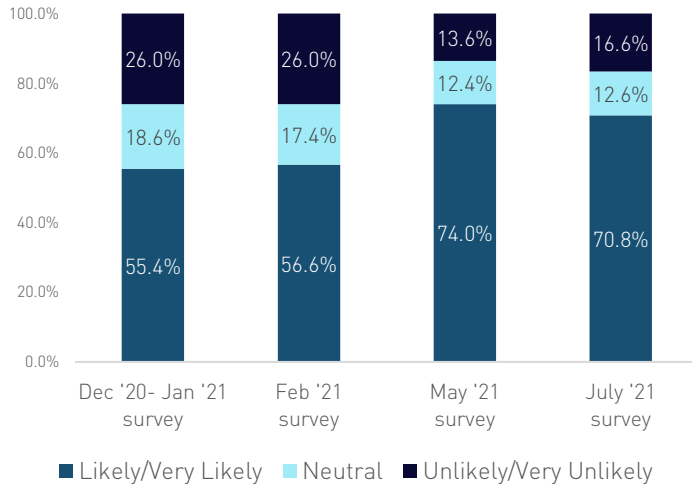
For specific dates please refer to [slide 8](#)

# AUSTRIA

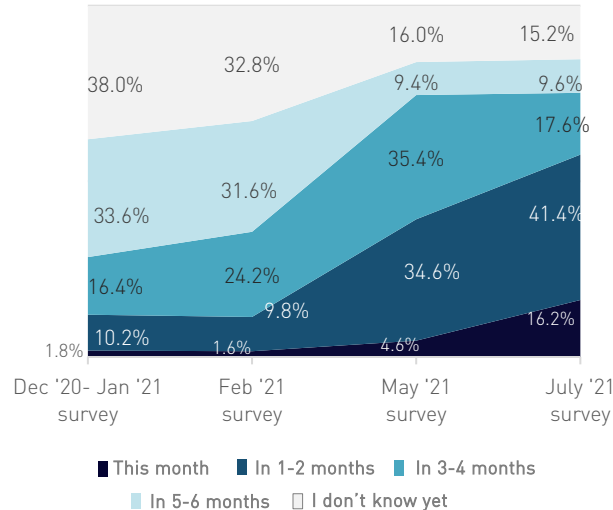
## 71% of Austrians will travel in the coming 6 months, mostly to other European countries (+15%)



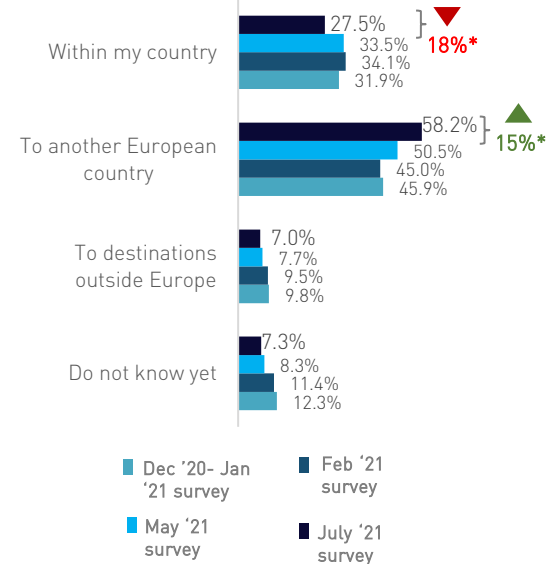
Willingness to travel in the next 6 months



When will Austrians travel?



Where will Austrians travel within the next 6 months?



For specific dates please refer to [slide 8](#)

Q11. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

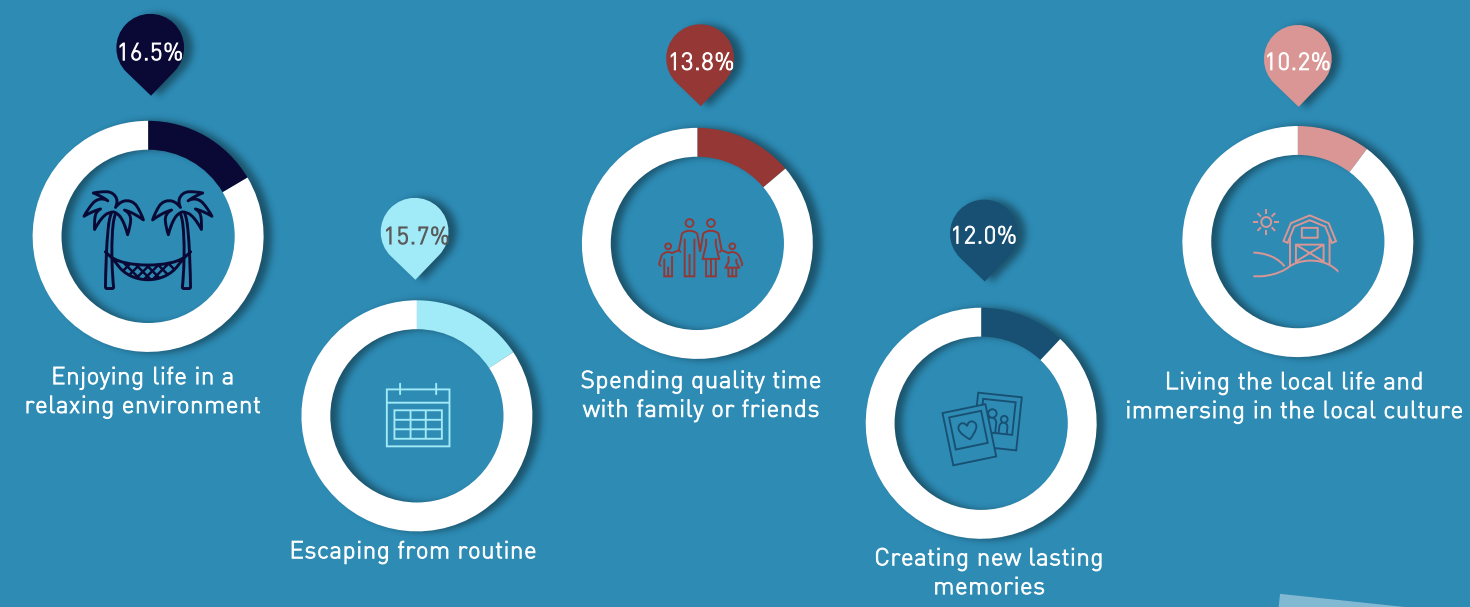
Q13. When are you most likely to go on your next trip either in your country or within Europe?

Q14. Where do you plan to travel in the next 6 months?

# TRIP PLANNING



# What do Europeans miss the most about travelling?



July '21 survey

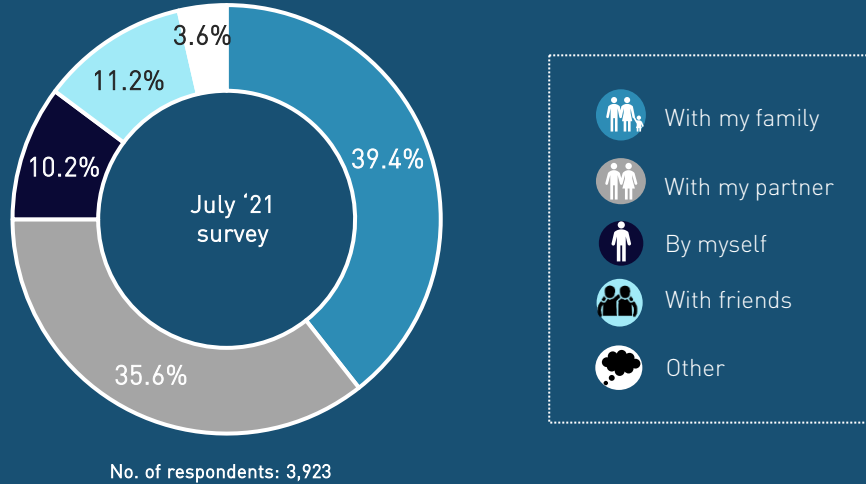
Europeans travelling with their family long to spend quality time together, re-connecting, while those travelling with their partner focus on enjoying romantic leisure time and enjoying life in a relaxing environment

The importance of 'creating new memories' is greater among younger respondents while 'escaping from routine' is more important for the 45+ age groups

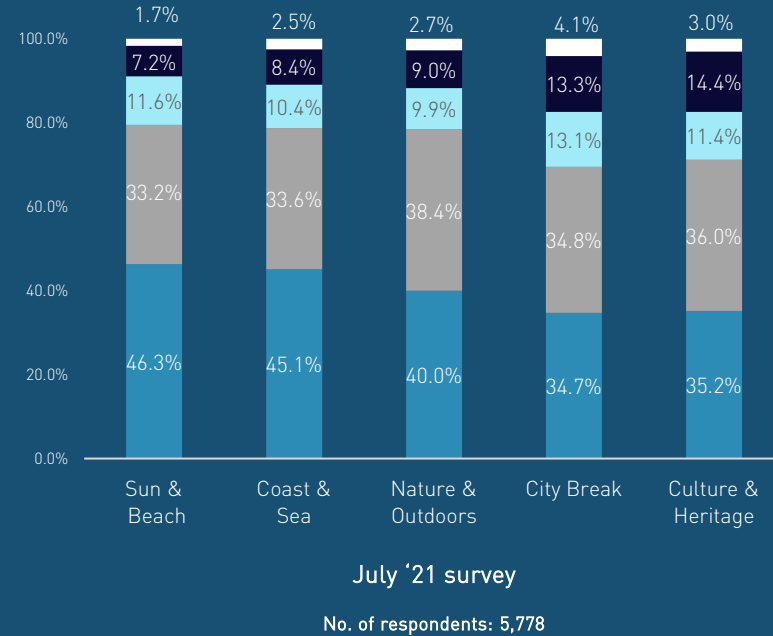
\* No significant changes between waves were recorded for this question

# Family travel leads Europeans' travel preferences in general, and for coast & beach holidays in particular

Preferred travel companion for respondents who are most likely to travel in the next 6 months\*



Preferred travel companion vs preferred type of holiday



Gen Z travellers (18-24 years old) are the most likely to travel with friends (24%), while baby boomers (54+ years old) are the most likely to travel with their partner (48%)

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

## 2 in 5 Europeans will drive on their next trip; the preference for air travel drops to its lowest point so far

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



Spain  
55.9%



UK  
51.9% ▼ 9%\*



France  
55.4%

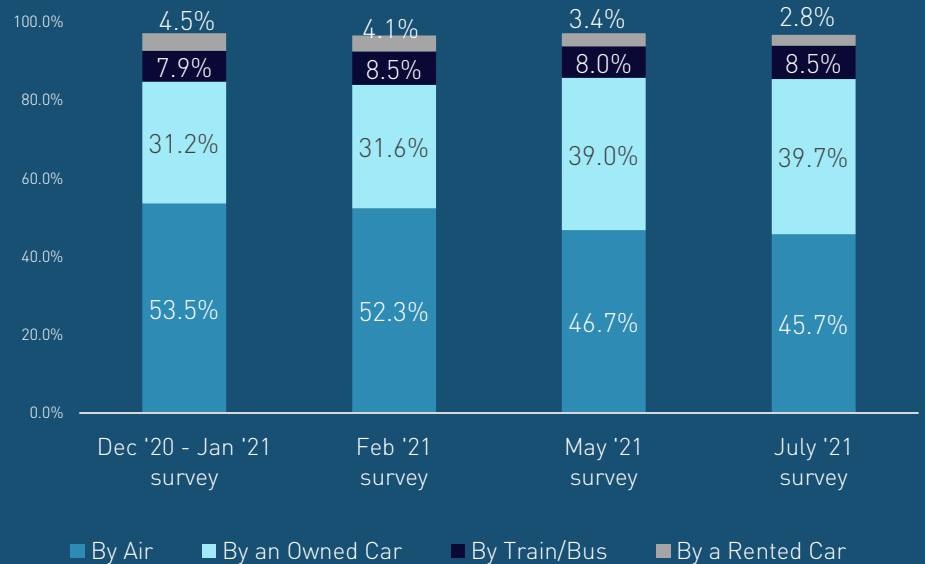


Italy  
51.8%



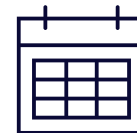
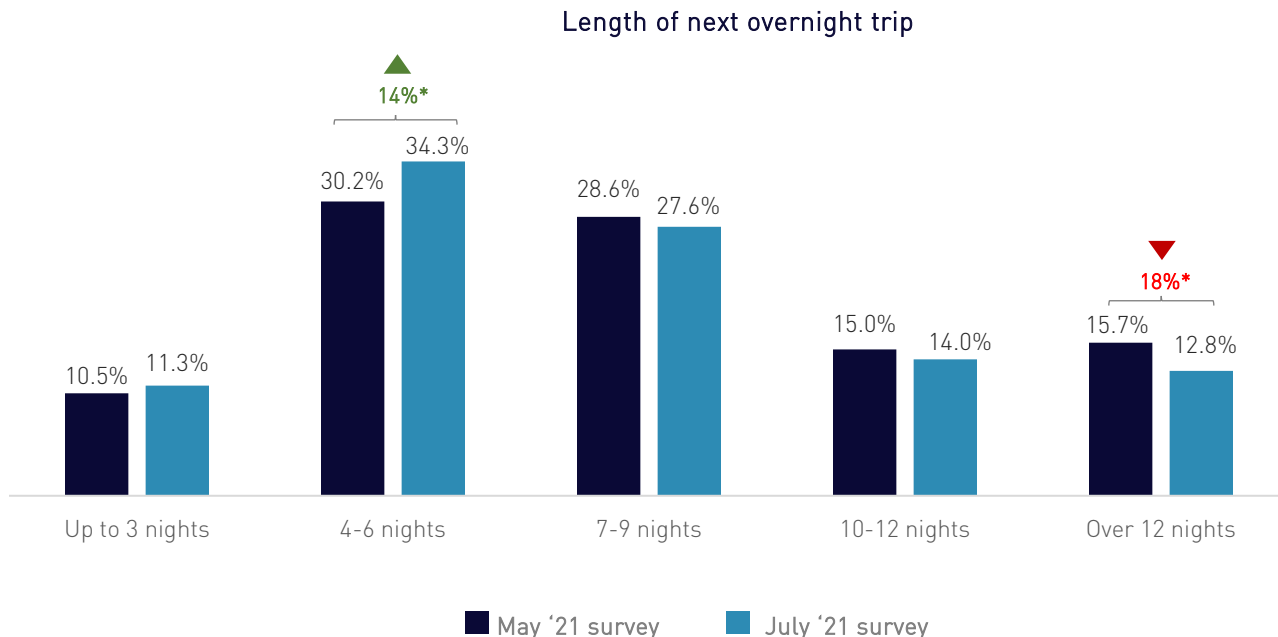
Poland  
52.2%

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





## One third of 'travel-ready' Europeans plan 4-6-night trips (+14%), and as summer ends, stays of 12+ nights drops by 18% overall



Europeans' planned length of stay is in line with the existing benchmark of 6.6 nights\*\*

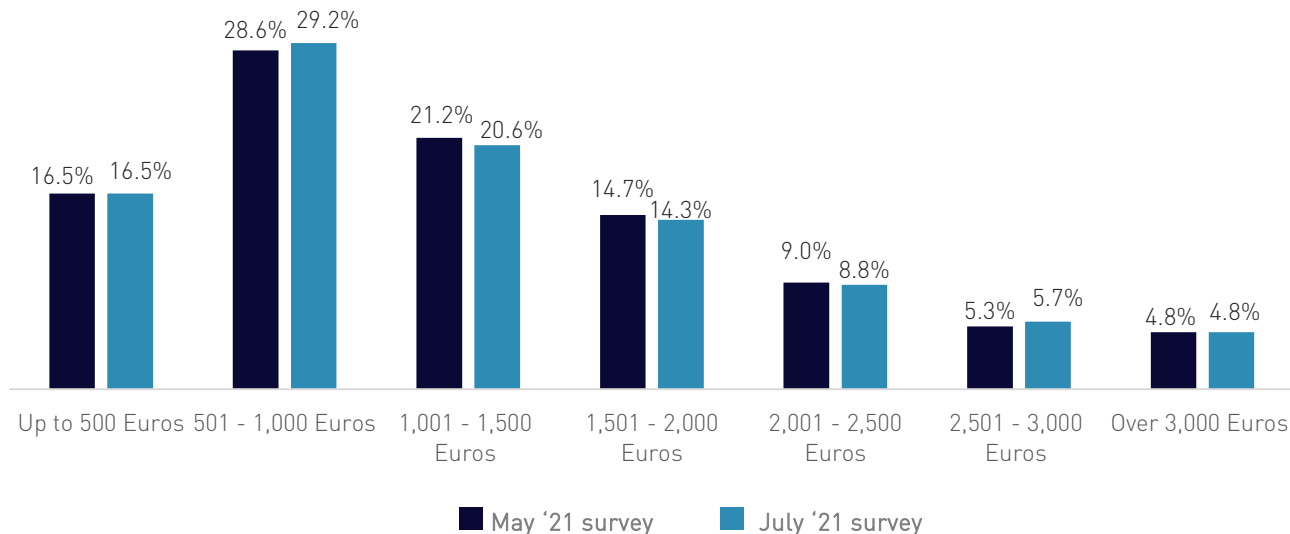
The most common length of stay for travellers on city break/nature & outdoors trips is 4-6 nights, while those on coast & sea/sun & beach escapes are most likely to stay for 7-9 nights

\* % change vs previous survey period

\*\* UNWTO, 2018

## Half of 'travel-ready' Europeans will invest 500-1,500 euros on their next trip, an increase from the pre-COVID benchmark of 595 euros per trip\*\*

### Investing in the next overnight trip



**Spend grows with distance:**  
The share of travellers spending over 1,000 euros is 47% in domestic tourism, 56% in cross-border tourism, and up to 64% when visiting a non-bordering European country

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

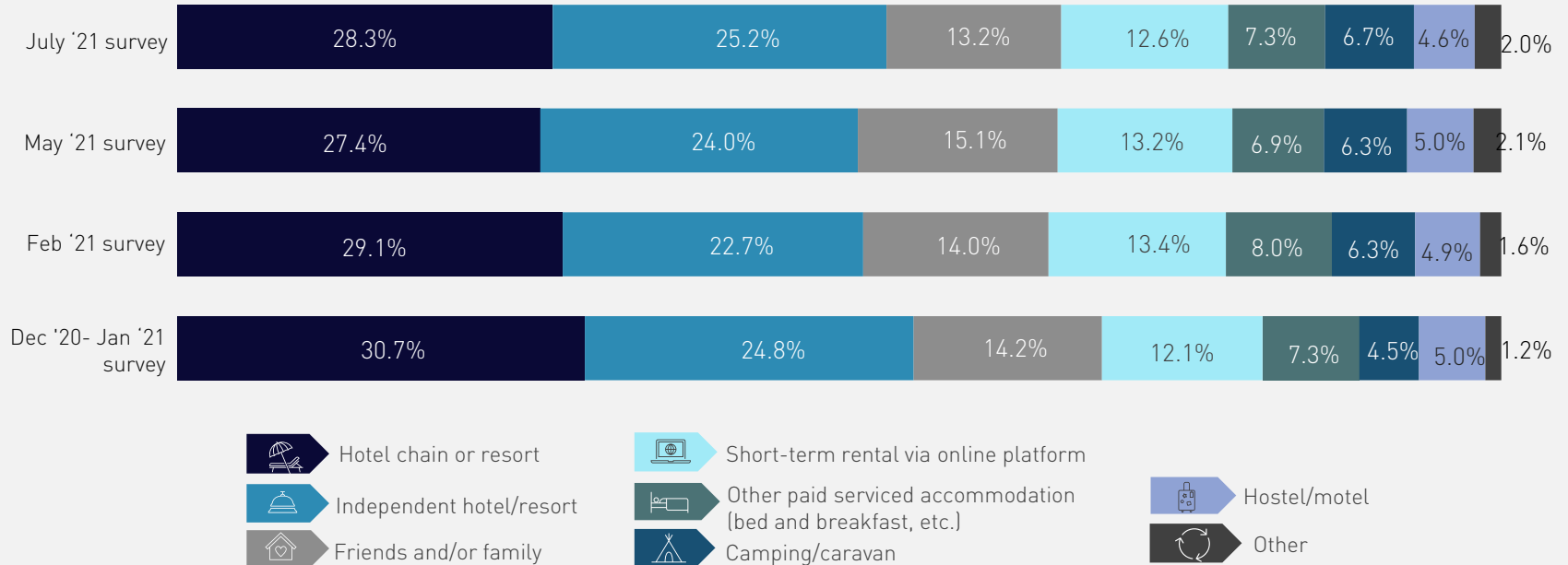
Q21. How much do you intend to spend on your next overnight trip (per person, including accommodation, transportation and travel activities)?

\*\* UNWTO, 2018 | Updated for 2020 prices

No. of respondents: 3,923

## Europeans show a consistent preference for staying in hotels on their next trip

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



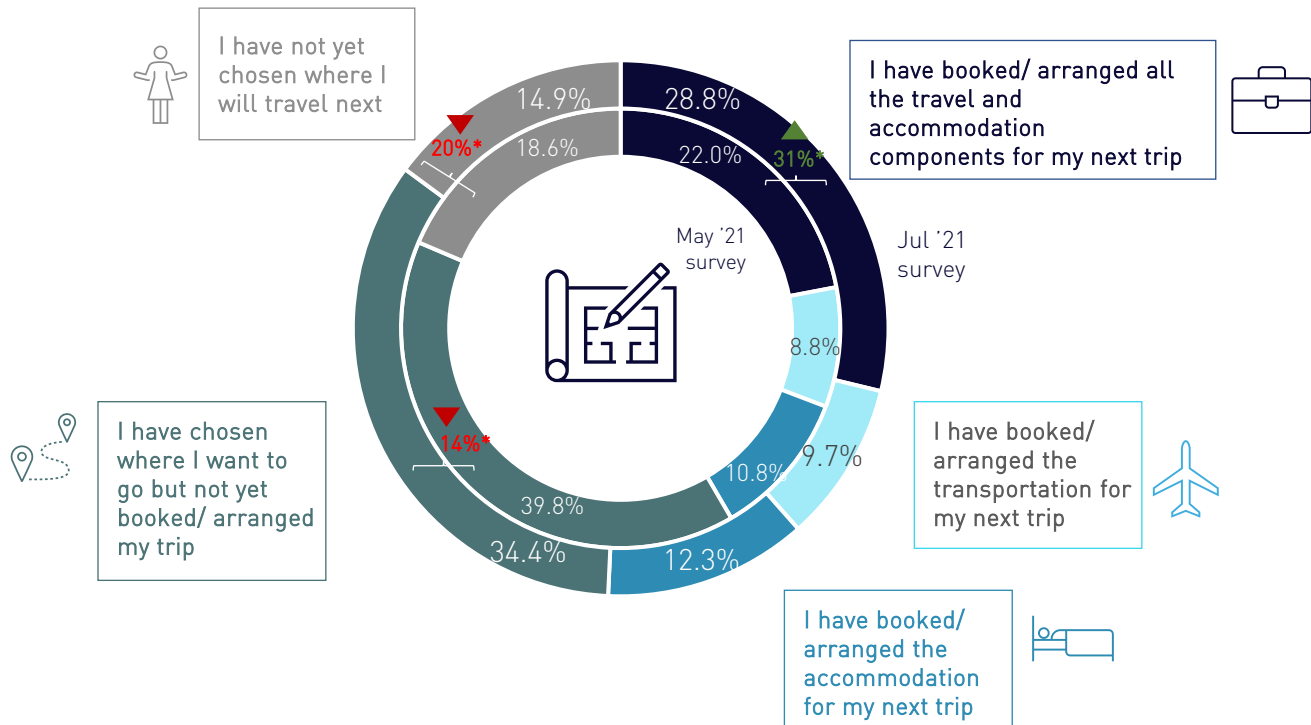
\* No significant changes between waves were recorded for this question

Q17. Which of the following types of accommodation would you most consider staying at during your next trip within Europe?

No. of respondents: 3,923

# The share of 'early-bird' travellers who have booked all their travel components is up by 31%, while uncertainty regarding their destination choice has declined by 20%

Status of planning for the next trip



Cautiousness about making travel decisions increases with age: 32% of Europeans over 54 have not yet chosen where they will travel next\*\*

\*\*This refers to the total sample

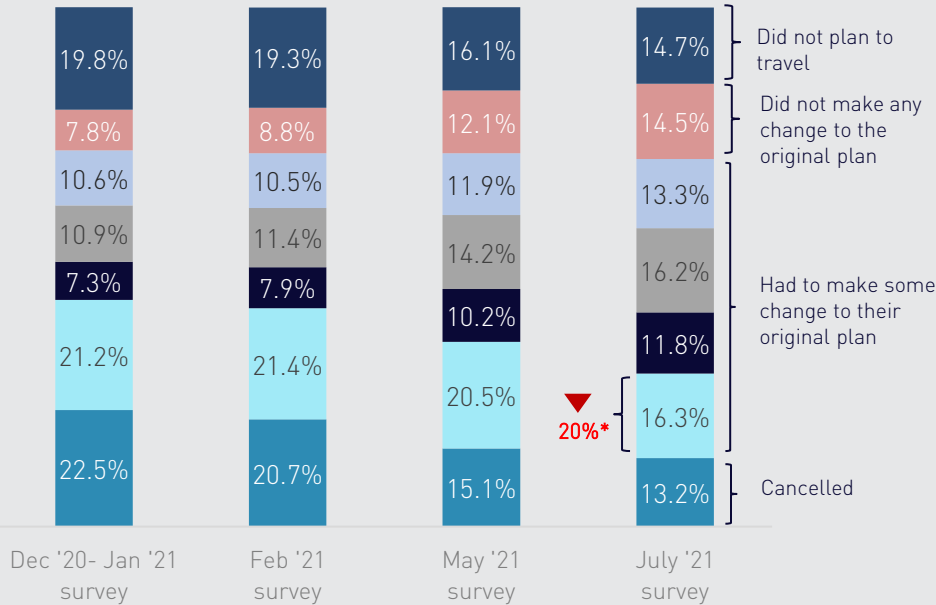
# TRAVEL CONCERNS



03

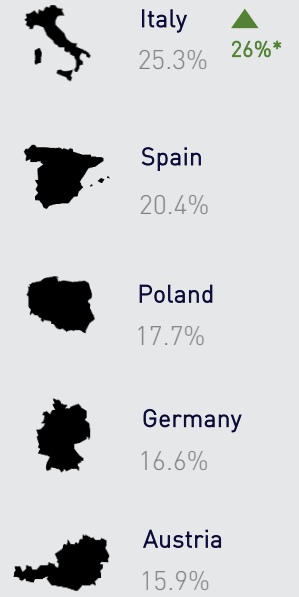
# Having learned to enjoy travel despite COVID-19 limitations, the share of Europeans refraining from planning trips drops to its lowest point yet

How has COVID-19 affected travel plans?



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

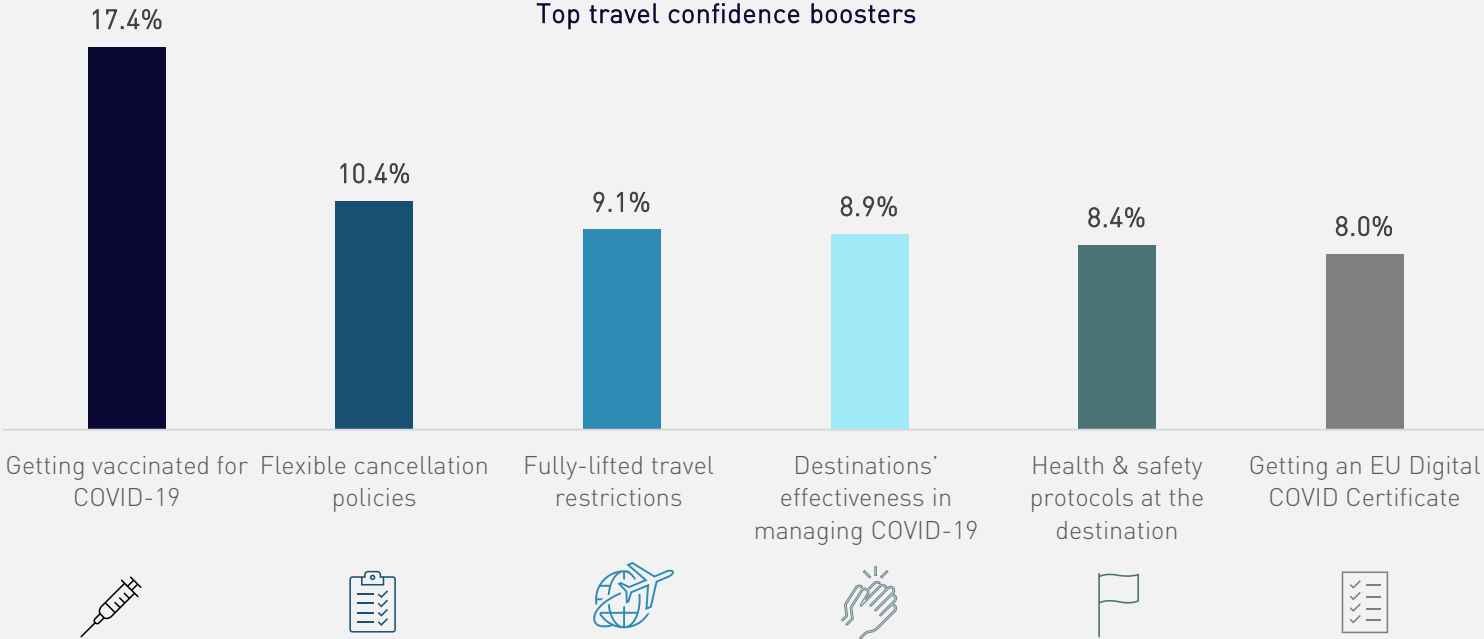
Top 5 markets choosing domestic over international travel



\* % change vs previous survey period  
No. of respondents: 5,778

# Vaccine rollout, flexible cancellation policies and fully-lifted travel restrictions are the factors enhancing Europeans' travel confidence the most

For travellers planning a trip between October-November, **pre-travel COVID-19 tests** are the 2<sup>nd</sup> most important factor (while ranked 8<sup>th</sup> among the total sample) and should be made highly accessible by destinations and businesses.

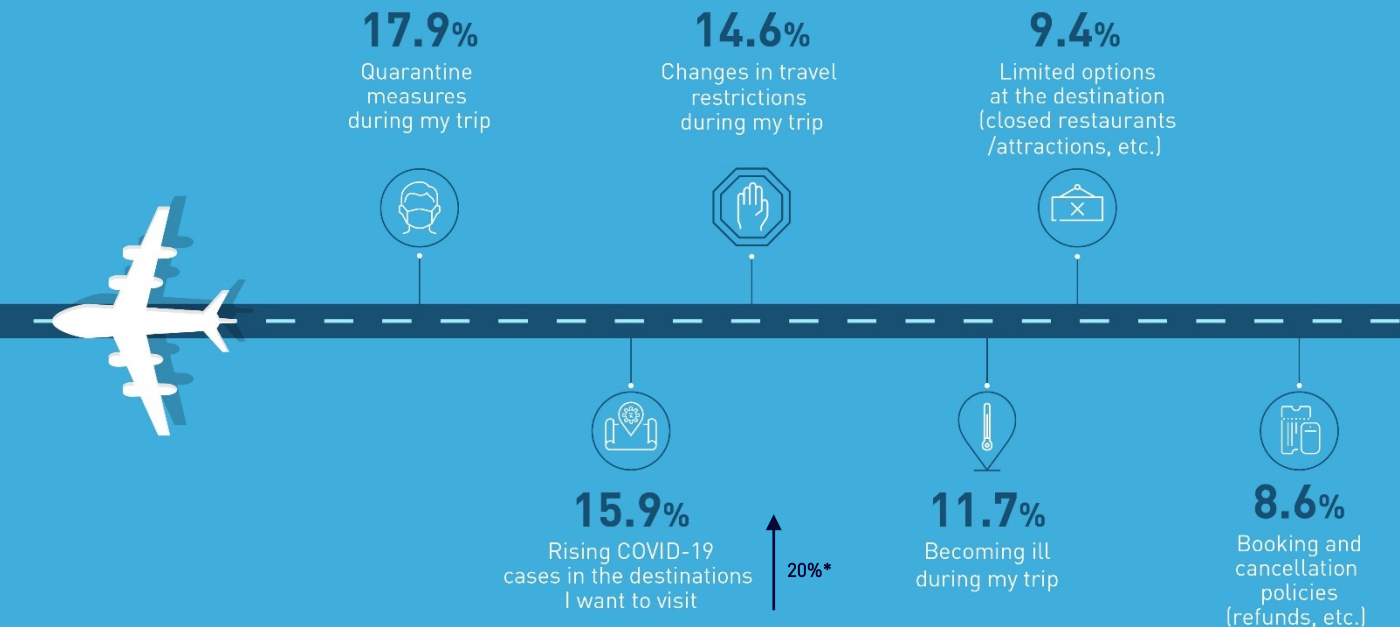


\* No significant changes between waves were recorded for this question

## 'TRAVEL-READY' EUROPEANS' CONCERNS

**Quarantine measures remain travellers' greatest worry, while anxiety about rising COVID-19 cases at the destination has surged by 20%**

Leading concerns for those who are most likely to travel next



Travellers aged 54+ tend to show higher levels of concern about **getting ill at the destination** (30% compared to 18% among 18-24-year-olds) and regarding **possible changes in travel restrictions** (29% compared to 18% among travellers aged 18-24)\*\*

\*\*This refers to the total sample

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

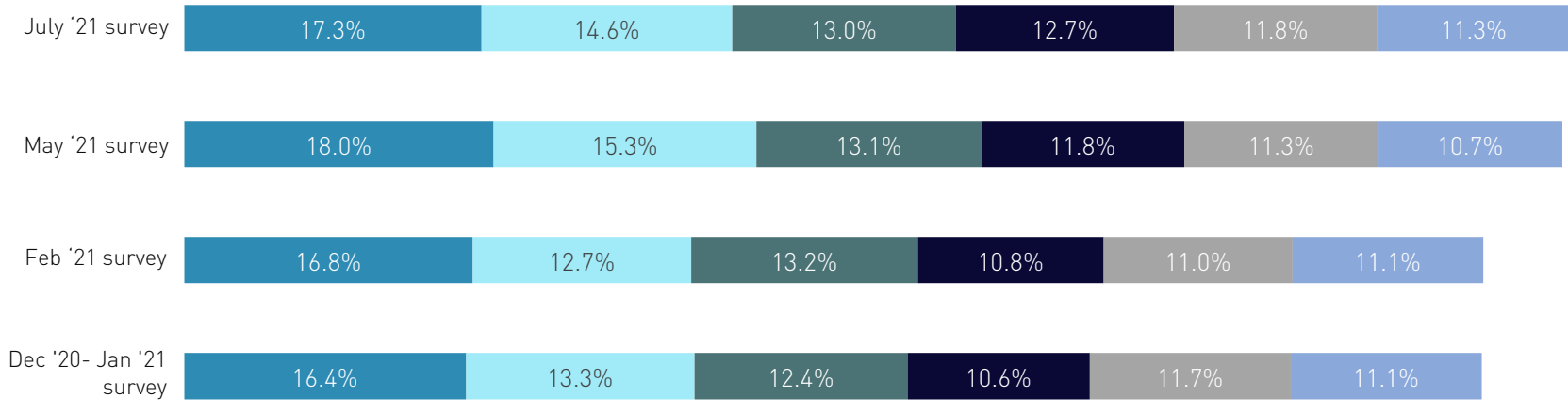
No. of respondents: 3,923

\* % change vs previous survey period



# Healthwise, Europeans perceive using public transportation (air or ground) to be the riskiest part of their travel journey, and they are now more concerned about attractions, tours and activities

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



Air travel



In destination transport (metro, bus, taxi)



Food & beverage



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



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

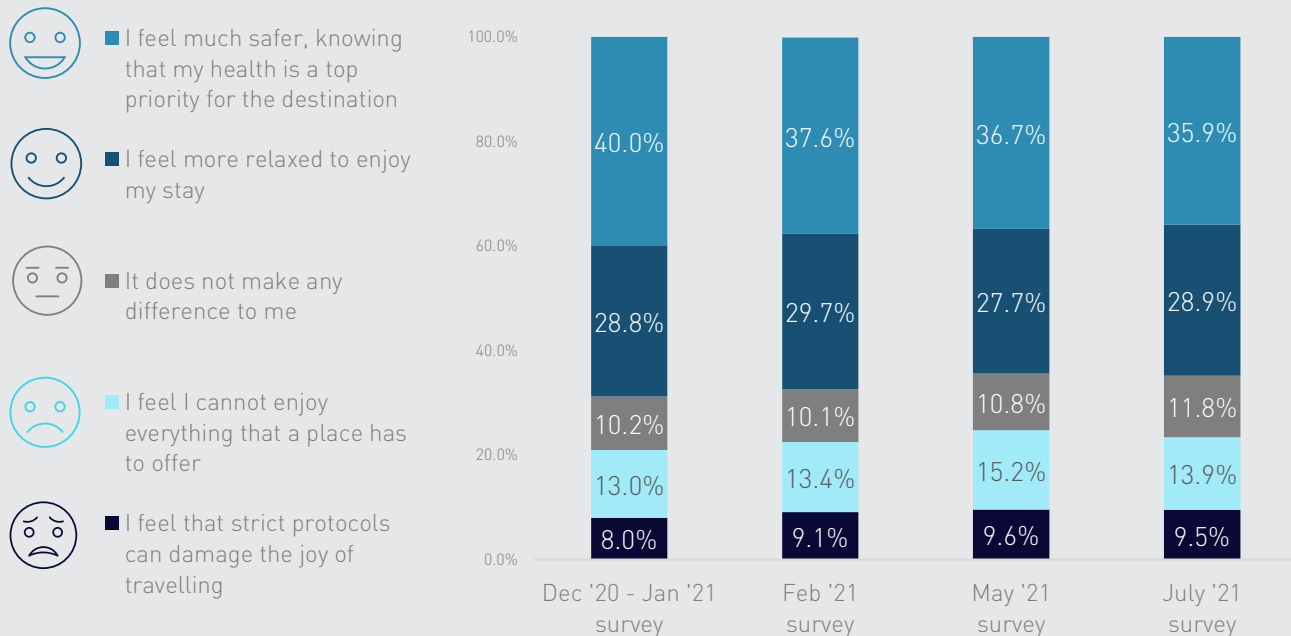


Accommodation – hotels and resorts

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

## Destinations' strict health and safety protocols make people with travel plans feel safer and more relaxed

Sentiment towards strict health & safety protocols



66% of travellers planning to travel by air have a favourable sentiment towards strict health and safety protocols, compared to 60% among those planning to travel by car

A person wearing a wide-brimmed hat, a light-colored puffer jacket, and a backpack is walking away from the camera down a narrow, cobblestone street. They are pulling a dark rolling suitcase. The street is flanked by old stone buildings with arched windows and doorways. The overall scene is in a cool, blue-toned color palette.

# METHODOLOGICAL ANNEX

# 04

# METHODOLOGICAL ANNEX

## THE SURVEY

- The report is based on an online market research of Europeans with at least 2 overnight trips in 2019.
- Distribution/ data collection period:
  - **Wave 5:** 18 December 2020 – 7 January 2021; sample = 5,855/**Wave 6:** 5-19 February 2021; sample = 5,837/**Wave 7:** 19-29 May 2021; sample = 5,921/**Wave 8:** 13-23 July 2021
  - 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 (9 questions) and Travel intentions, preferences and trip planning (12 questions)
- 50% of the survey's respondents are male and 50% are female. Sample size and age groups are listed below:

		Country										Total
		UK	IT	ES	AT	FR	DE	PL	BE	CH	NL	
Age	18 - 24	88	73	45	84	96	92	56	169	84	217	1,010
	25 - 34	135	112	74	128	129	153	106	97	64	122	1,109
	35 - 44	126	135	101	112	141	150	120	99	74	66	1,118
	45 - 54	138	167	105	103	146	168	93	75	38	56	1,093
	≥55	263	263	175	73	238	187	125	60	18	39	1,448
Total		750	750	500	500	750	750	500	500	278	500	5,778

# COMPANY PROFILE



## V+O GROUP

V+O Group is a leading, independent and integrated communication agency in Southeast Europe.

Our +160 professionals give modern leaders the actionable intelligence, insightful analysis, strategic counsel and practical tools they need to enable their organizations to thrive. The group has 13 companies +210 clients and offices in Athens, Belgrade, Bucharest, Sofia, Tirana, Nicosia and Skopje, addressing a market of 62 million consumers.

In Greece, the V+O Group comprises the following four (4) companies: V+O COMMUNICATION, a holistic & multidisciplinary strategic comms & PR services agency, UNLIMITED CREATIVITY a creative powerhouse, Curious Ahead, the digital agency of the Group, and MINDHAUS, a Tourism Marketing consulting agency.

## MINDHAUS

MINDHAUS is a tourism marketing agency and member of V+O Group.

We are dedicated to developing, managing, and marketing destinations, supporting & strengthening organisations, businesses, and brands, and successfully connecting them to the Visitor Economy. Our services range from consumer insights and strategy development to outsource marketing management, integrated communication campaigns, and tourism crisis communications.



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This project is co-funded by the European Union

### **Study on Monitoring Sentiment for Intra-European Travel**

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Data sources: This report is based on research conducted by MINDHAUS ([www.mindhaus.gr](http://www.mindhaus.gr)) 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.

### **Published by the European Travel Commission**

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1000 Brussels, Belgium  
Website: [www.etc-corporate.org](http://www.etc-corporate.org)  
Email: [info@visiteurope.com](mailto:info@visiteurope.com)

ISBN No: 978-92-95107-54-0  
Design: MINDHAUS  
Photo: Adobe Stock

Co-funded by  
the European Union



EUROPEAN  
TRAVEL  
COMMISSION