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# Population survey in Switzerland: travel preferences and interest in the Baltic countries, 2022

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# The aim and organisation of the survey

- The survey was commissioned, and the summary report was compiled by the Tourism Department of the Estonian Business and Innovation Agency, the fieldwork was carried out by RAIT Faktum&Ariko.
- The aim of the survey was to map the intentions of Swiss residents to travel abroad, their interest in travelling to Estonia and their travel preferences.
- The survey was carried out as an online survey in October 2022, using a pre-selected online panel representing the population of Switzerland. The sample was designed in such a way that invitations to participate in the survey were sent to the members of the online panel according to the socio-demographic profile of the population (aged 18-79) by gender, age and region of residence.
- **The final sample consisted of those who answered to the filter question that they were planning to go on holiday abroad in the next 3 years.** Thus, the final sample (N=1015) describes the proportion of the population planning to go on holiday abroad in the next 3 years. Their distribution may not match the socio-demographic proportions of the total population aged 18-79.
- The survey was conducted in German and French. As a consequence, residents of the Italian-speaking Ticino region (also the smallest region in terms of population) were excluded from the survey.



# Summary (1)

- 56% of respondents plan to take at least 2 holidays abroad per year in the next 3 years, 29% plan to travel abroad once a year and 15% plan to travel abroad 1-2 times in the next 3 years.
- 9% of respondents say they know nothing about Estonia, 28% only know the name of Estonia, 45% know the name and location of Estonia, 14% know more than the name and location of Estonia and 4% say that they know quite a lot about Estonia.
- 1/4 of respondents have visited Finland, 7% have visited Estonia, 6% Latvia and 4% have visited Lithuania. 69% of respondents have not been to any of these countries.
- Of those who have been to Estonia, 75% have been to at least one of the other countries asked (Latvia, Lithuania or Finland). Combining a visit to Estonia with a visit to Finland is much more common than combining a visit to Latvia or Lithuania. 2/3 of visitors to Estonia have also visited Finland, while 39% have visited Latvia and 33% Lithuania.
- 35% of respondents are interested in a holiday trip to the Baltics in the next 3 years, 47% are interested in finding out more about the Baltics to decide if they want to go there. However, 19% are not interested in either option. Respondents with higher incomes who travel abroad at least twice a year and respondents aged 25-44 are more interested in visiting the Baltics.
- When travelling to the Baltics, 62% of respondents would also visit other countries (e.g., the Baltic States, Finland) on the same trip. 16% would only visit Estonia and a fifth have no preference.
- As a reason for being interested in travelling to the Baltics, respondents said in the open-ended question that they simply like travelling and discovering new countries, so they could visit the Baltics for a change to see new, different, less familiar, less visited countries. Both culture and nature are of interest.

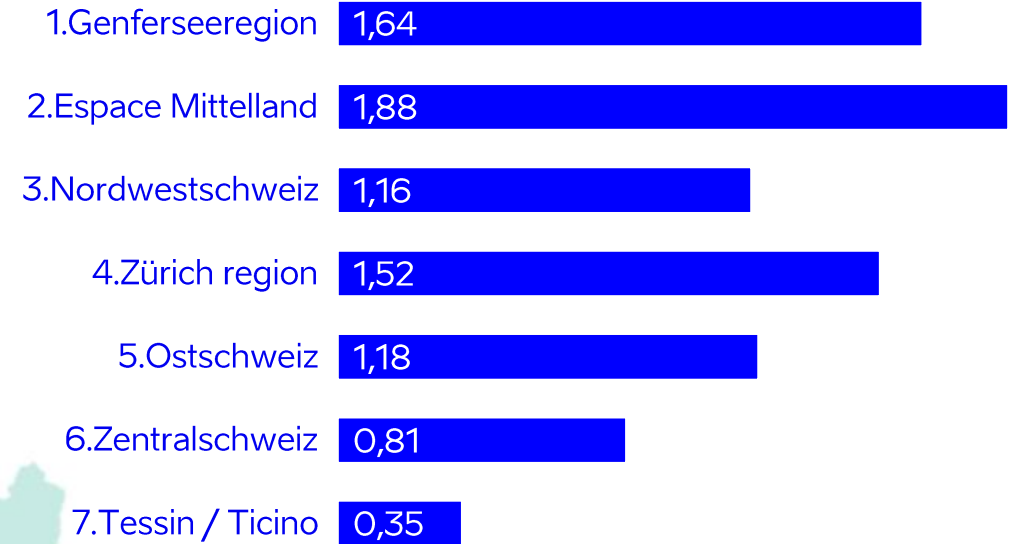
# Summary (2)

- If the Baltic countries are not of interest, the main reason given (in the open question) was that there are other, more interesting destinations where people prefer to travel (48%). 12% cited lack of security / war in Ukraine / proximity to Russia. 8% said that the Baltic climate is not attractive, they prefer warm countries.
- Of those who are or might be interested in visiting Estonia, 68% would prefer an individual trip and 1/5 a group trip. 12% could not say. An individual trip is the overwhelming preference for all age groups, with the exception of 65—79-year-olds, 38% of whom would prefer to travel in a group and 45% an individual trip.
- Of those who are interested or might be interested in visiting Estonia, 30% would book with a travel company with the help of a travel consultant, 24% online via the travel company's website and 34% via another online channel. The younger the age group, the less likely they would use a travel agency.
- The main sources of inspiration for planning a trip abroad are Google and other search engines (47%), travel agency or tour operator (42%), travel review websites (e.g., Tripadvisor) (38%), recommendations from friends (33%) and official websites of destinations (32%).
- The younger the age group, the more important search engines and social media are for them. The older the age group, the more important for them are travel agencies, official websites of destinations and publications (travel books, brochures, magazines).
- 27% are not prepared to donate to a sustainable project in their destination on their next trip abroad to compensate for the ecological footprint of their trip. 22% are willing to donate €1-4, 22% would donate €5-9 and 29% would donate €10 or more. Women and 65—79-year-olds are willing to donate bigger sums than the average.

# Regional distribution used in the survey



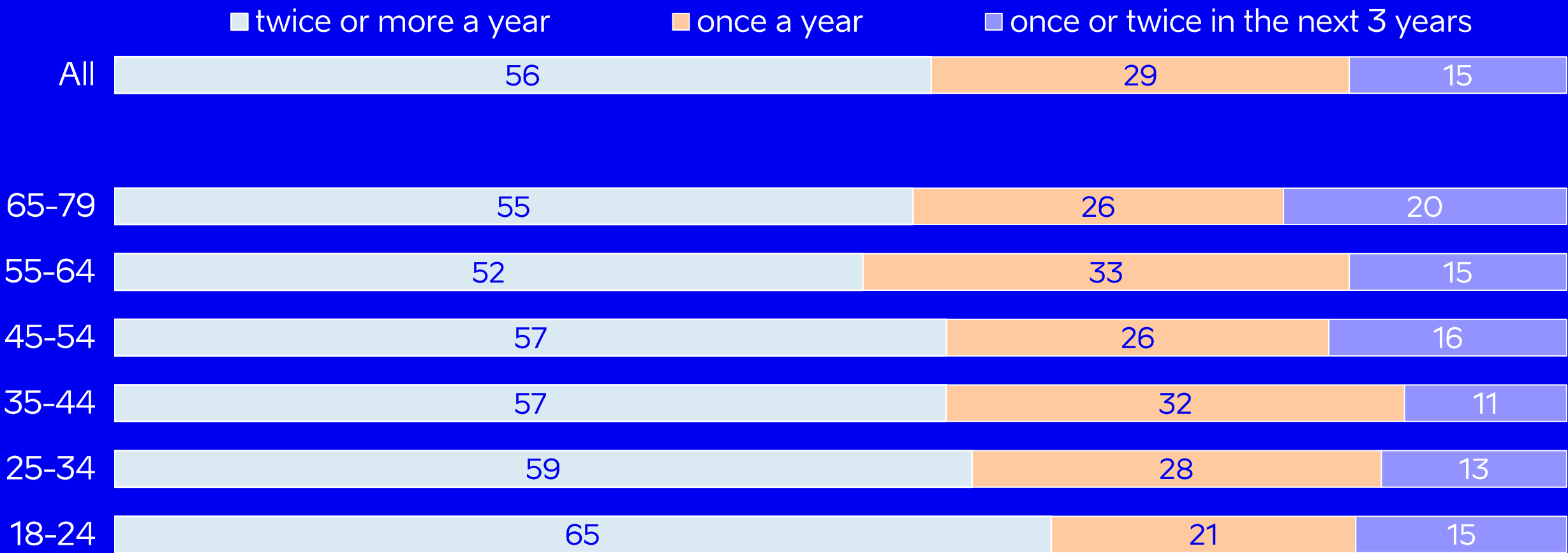
## Population by region (mln)



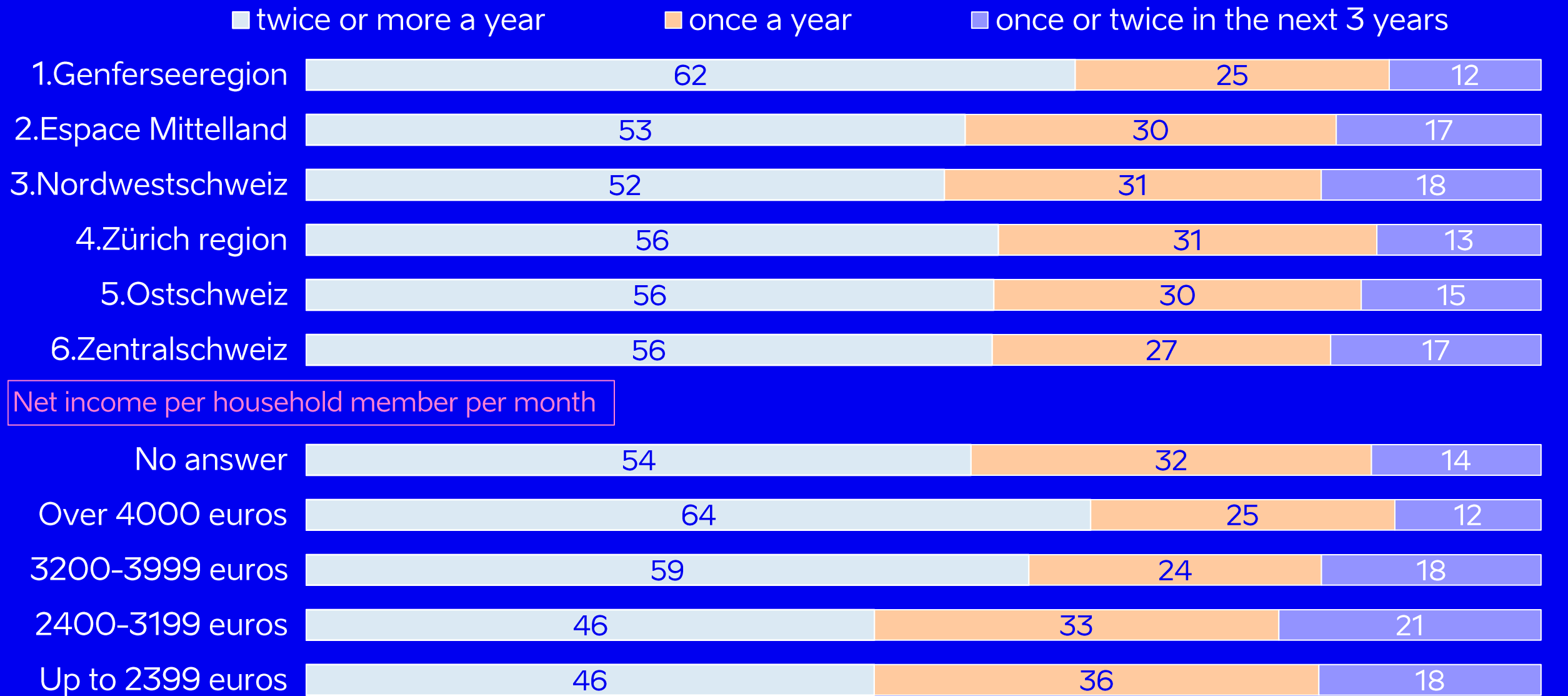
- Switzerland has 8,6 mln inhabitants.
- For 63%, German is the main language, for 23%, French is the main language and for 8%, Italian is the main language.
- Genferseeregion is mainly French-speaking, Ticino mainly Italian-speaking, and other regions mainly German-speaking.

# How often do you expect to go on leisure trips abroad in the next 3 years? (%)

56% of respondents plan to take at least 2 holidays abroad per year in the next 3 years, 29% plan to travel abroad once a year and 15% plan to travel abroad 1-2 times in the next 3 years. Respondents aged 18-24, residents of the Genferseeregion and respondents with net income over 4000 euros plan to travel more frequently.



# How often do you expect to go on leisure trips abroad in the next 3 years? (%)



# Knowledge of Estonia and previous trips to the Baltic region

- 9% of respondents say they know nothing about Estonia, 28% know only the name of Estonia, 45% know the name and location of Estonia, 14% know more than the name and location of Estonia and 4% say they know quite a lot about Estonia.
- Those who rate their knowledge as above average are slightly more likely to be among those who generally travel abroad more often. Of the small group who have visited Estonia (7% of all respondents), 31% know quite a lot about Estonia and 56% know more about Estonia than its name and location.
- 1/4 of respondents have visited Finland, 7% have visited Estonia, 6% Latvia and 4% have visited Lithuania. 69% of respondents have not been to any of these countries.
- Men are more likely to have visited each of these

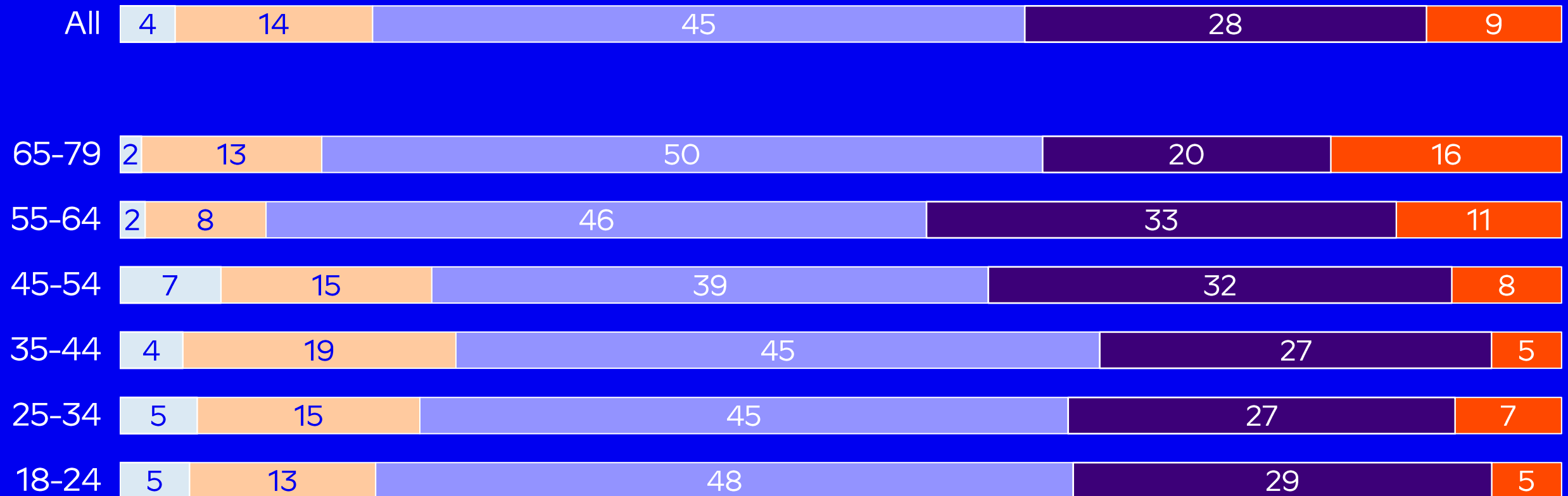
countries than women (this is probably related to the fact that men generally travel more for work).

- Middle age groups (25-54), those with higher incomes and those who travel abroad more often are slightly more likely to have visited Estonia.
- Of those who have visited Estonia, 75% have visited at least one other country in the region (Latvia, Lithuania or Finland) in addition to Estonia, while 38% have visited two other countries in addition to Estonia.
- Combining a visit to Estonia with a visit to Finland is much more common than combining with a visit to Latvia or Lithuania. Of those who have visited Estonia, 2/3 have also visited Finland, while 39% have visited Latvia and 33% Lithuania.



# How much do you know about Estonia? (%)

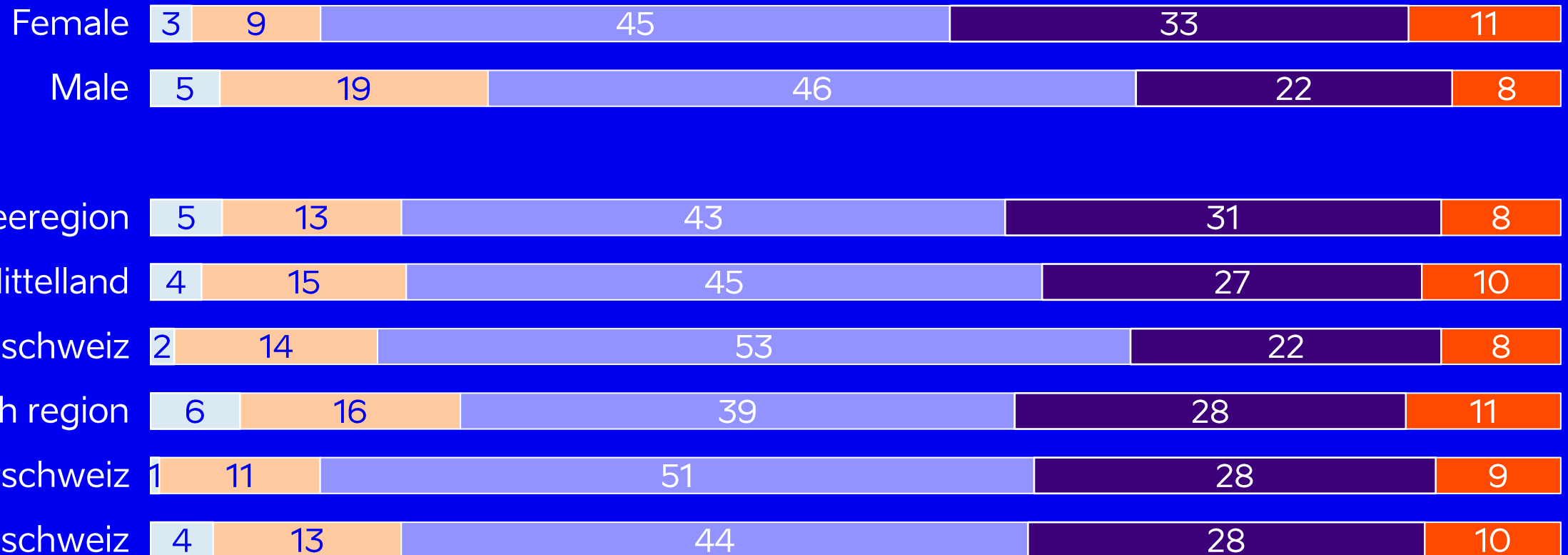
- I know quite a lot about Estonia
- I know some more about Estonia than only its name and location
- I know the name and location of Estonia
- I only know the name of Estonia
- I don't know Estonia



N=1015 (respondents who expect to go on leisure trips abroad in the next 3 years)

# How much do you know about Estonia? (%)

- I know quite a lot about Estonia
- I know some more about Estonia than only its name and location
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N=1015 (respondents who expect to go on leisure trips abroad in the next 3 years)

# How much do you know about Estonia? (%)

- I know quite a lot about Estonia
- I know some more about Estonia than only its name and location
- I know the name and location of Estonia
- I only know the name of Estonia
- I don't know Estonia

Has not visited Estonia

Knowledge Level	Percentage
I know quite a lot about Estonia	2
I know some more about Estonia than only its name and location	10
I know the name and location of Estonia	48
I only know the name of Estonia	30
I don't know Estonia	10

Has visited Estonia

Knowledge Level	Percentage
I know quite a lot about Estonia	31
I know some more about Estonia than only its name and location	56
I know the name and location of Estonia	14

## Respondents who are...

...interested in visiting the Baltics within the next 3 years

Knowledge Level	Percentage
I know quite a lot about Estonia	8
I know some more about Estonia than only its name and location	25
I know the name and location of Estonia	46
I only know the name of Estonia	17
I don't know Estonia	5

...interested in finding out more about the Baltics

Knowledge Level	Percentage
I know quite a lot about Estonia	1
I know some more about Estonia than only its name and location	8
I know the name and location of Estonia	51
I only know the name of Estonia	32
I don't know Estonia	8

...not interested in visiting the Baltics or finding out more

Knowledge Level	Percentage
I know quite a lot about Estonia	3
I know some more about Estonia than only its name and location	6
I know the name and location of Estonia	30
I only know the name of Estonia	39
I don't know Estonia	22

## Respondents who expect to go on leisure trips abroad...

...once or twice in the next 3 years

Knowledge Level	Percentage
I know quite a lot about Estonia	3
I know some more about Estonia than only its name and location	11
I know the name and location of Estonia	36
I only know the name of Estonia	38
I don't know Estonia	14

...once a year

Knowledge Level	Percentage
I know quite a lot about Estonia	3
I know some more about Estonia than only its name and location	12
I know the name and location of Estonia	41
I only know the name of Estonia	34
I don't know Estonia	10

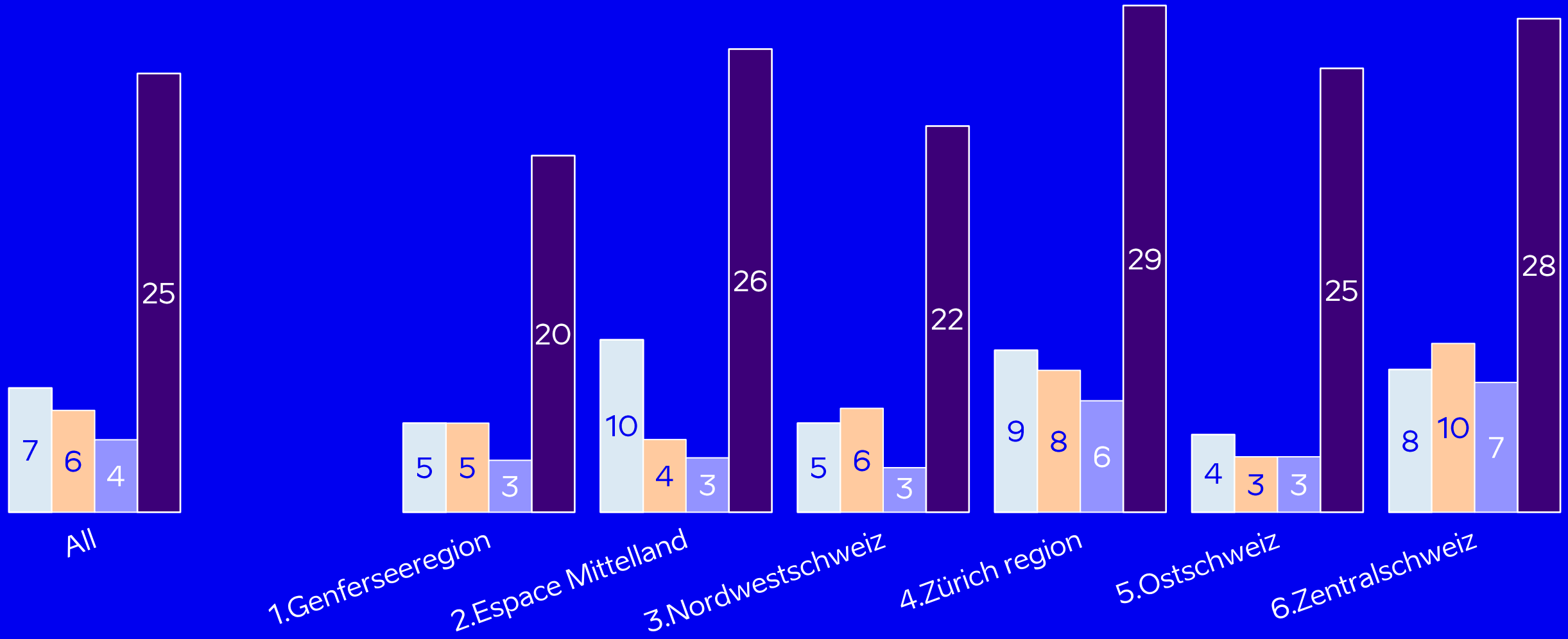
...twice or more a year

Knowledge Level	Percentage
I know quite a lot about Estonia	4
I know some more about Estonia than only its name and location	16
I know the name and location of Estonia	50
I only know the name of Estonia	22
I don't know Estonia	8



# Have you visited any of the Baltic countries or Finland? (%)

■ Yes, Estonia ■ Yes, Latvia ■ Yes, Lithuania ■ Yes, Finland

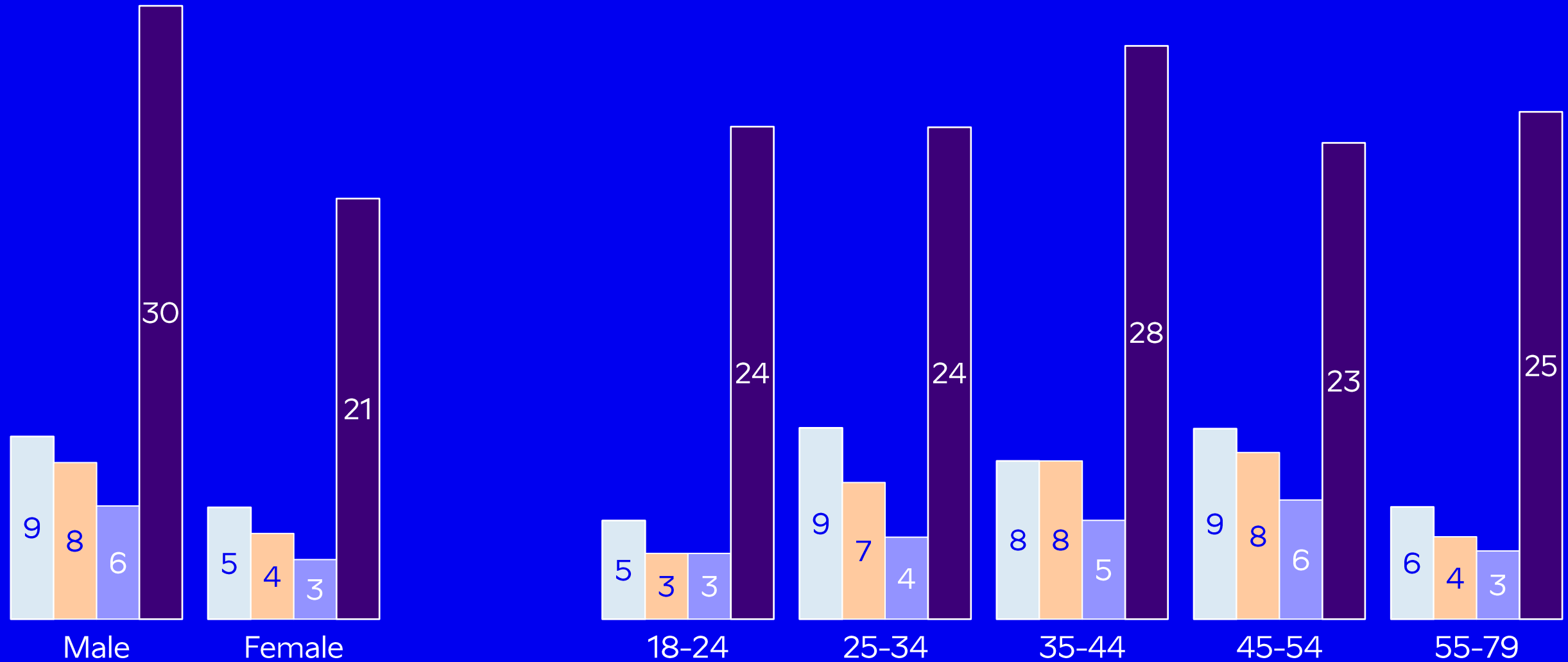


Region of residence

N=1015 (respondents who expect to go on leisure trips abroad in the next 3 years)

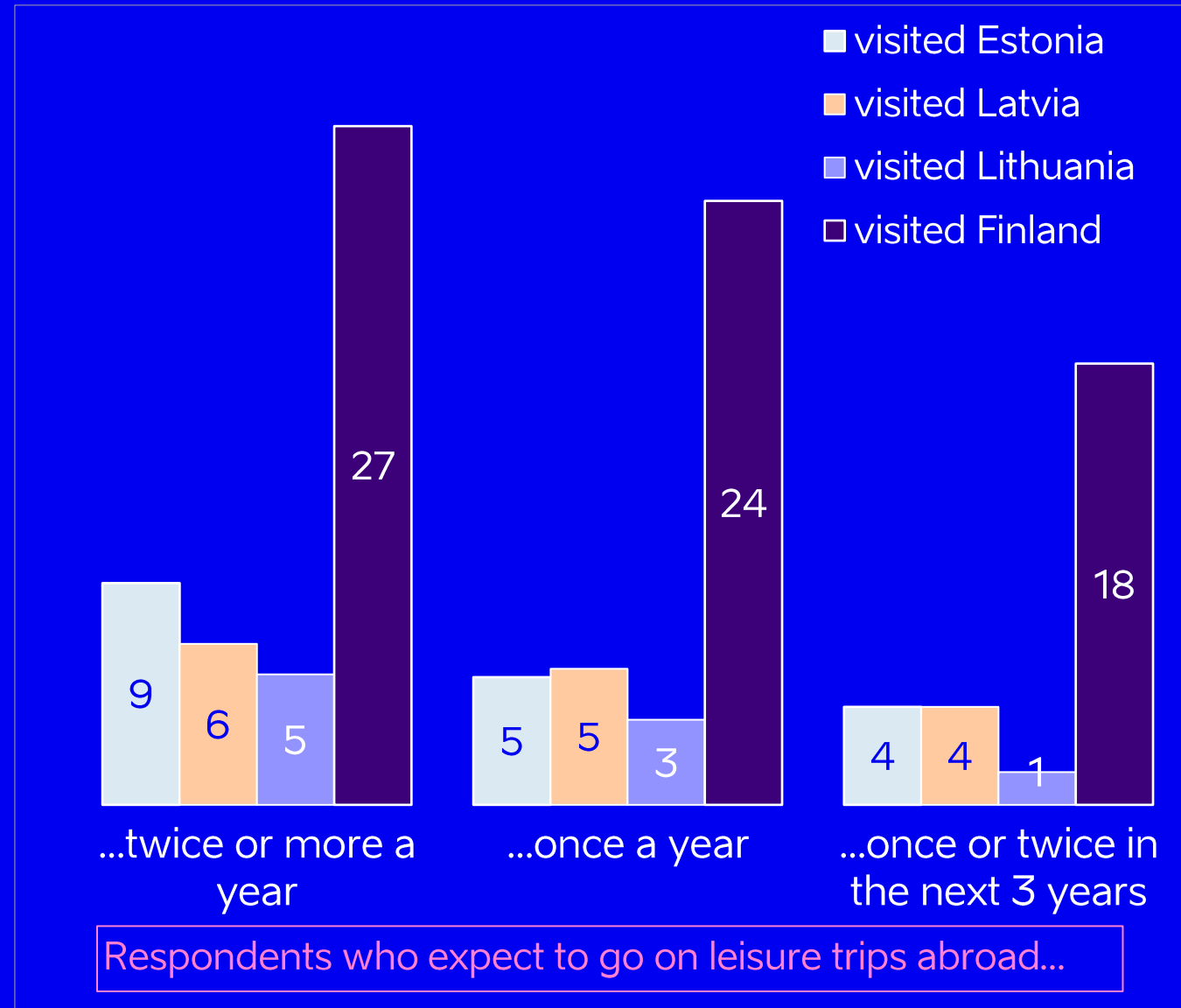
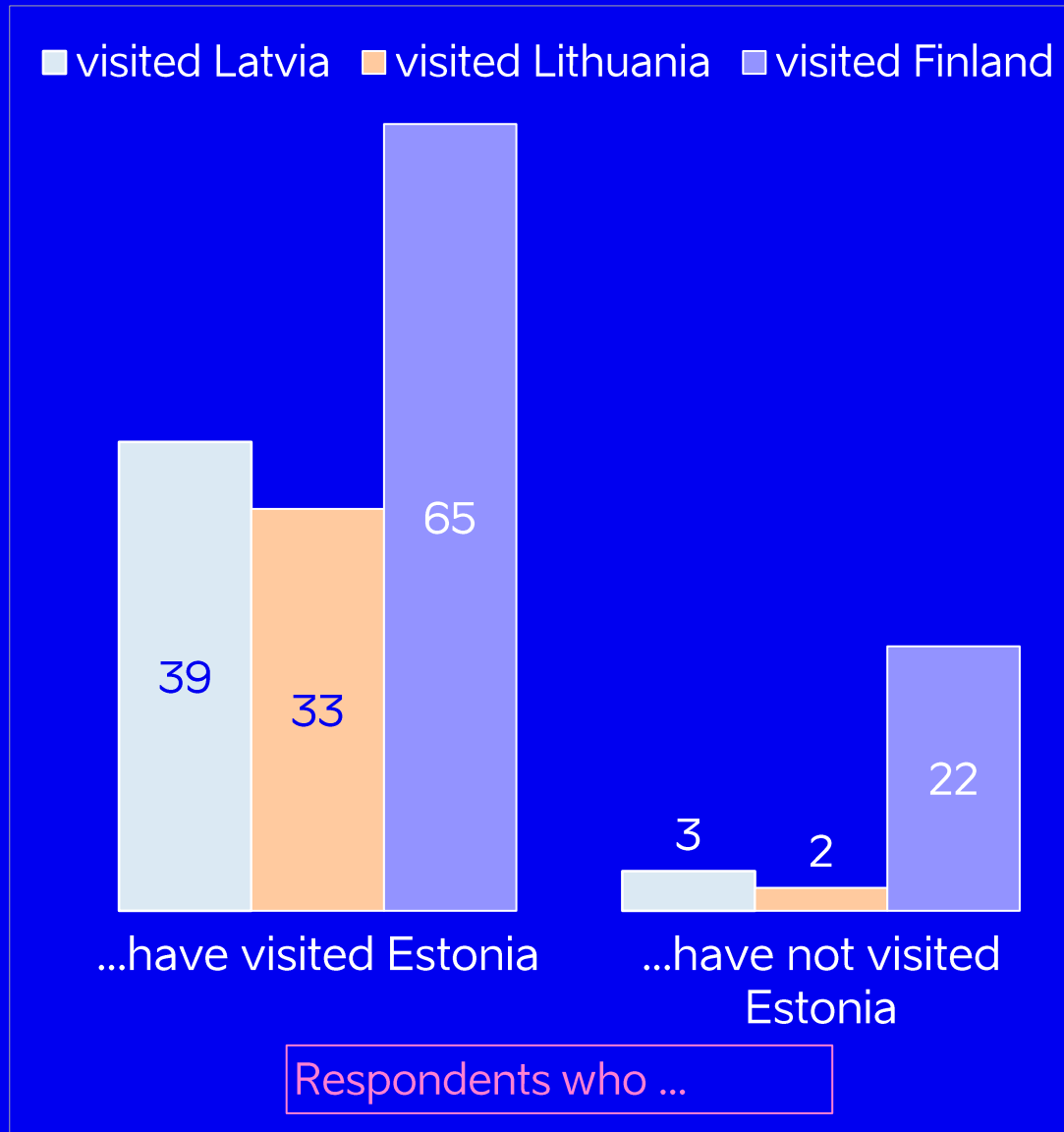
# Have you visited any of the Baltic countries or Finland? (%)

■ Yes, Estonia   ■ Yes, Latvia   ■ Yes, Lithuania   ■ Yes, Finland



N=1015 (respondents who expect to go on leisure trips abroad in the next 3 years)

# Have you visited any of the Baltic countries or Finland? (%)



N=1015 (respondents who expect to go on leisure trips abroad in the next 3 years)



# Interest in travelling to the Baltics

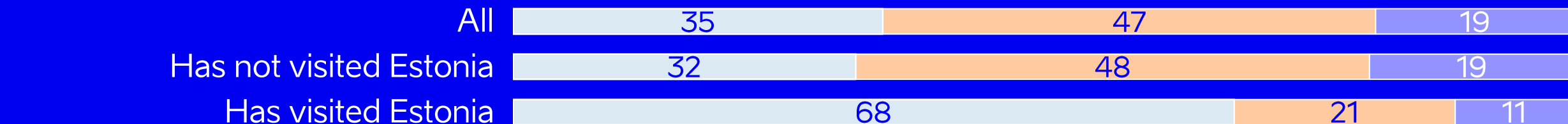
- 35% of respondents are interested in a holiday trip to the Baltics in the next 3 years, 47% are interested in finding out more about the Baltics to decide if they want to go. 19%, however, are not interested in going to the Baltics or learning more about it.
- Respondents who travel abroad at least twice a year and respondents aged 25-44 are more interested in visiting the Baltics.
- The higher the income, the greater the interest in travelling to the Baltics: 44% of respondents with an income above €4,000 and 38% of respondents with an income between €3,200 and €3,999 are interested.
- Of the small group of respondents who have visited Estonia (7%), as many as 68% are interested in a holiday trip to the Baltics in the next 3 years.
- When travelling to the Baltics, 62% of respondents would also visit other countries (e.g. the Baltic States,

Finland) on the same trip. 16% would visit Estonia only and one fifth have no preference.

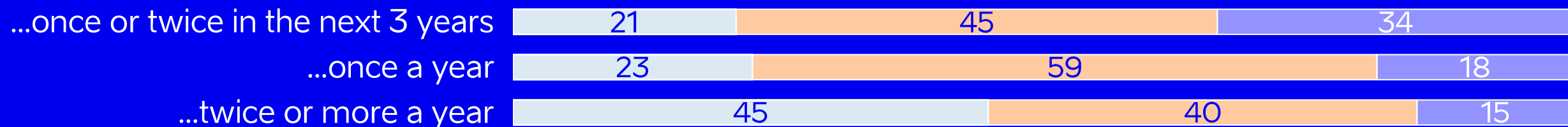
- Of those interested in visiting the Baltics in the next 3 years, 72% would prefer a combined visit to several countries and 15% would prefer to visit Estonia only. 13% could not say.
- Of those interested in finding out more about the Baltics first, 55% would prefer a combined visit to several countries and 17% would prefer a visit to Estonia only. However, 28% had no preference.
- Of those who have visited Estonia, 72% would visit Estonia combined with other countries on a new trip and 22% would visit Estonia alone. Of those who have not visited Estonia, 61% would visit Estonia combined with other countries, 16% would visit Estonia alone (the rest had no preference).

# What would best describe your position about travelling to the Baltic countries for holidays? (%)

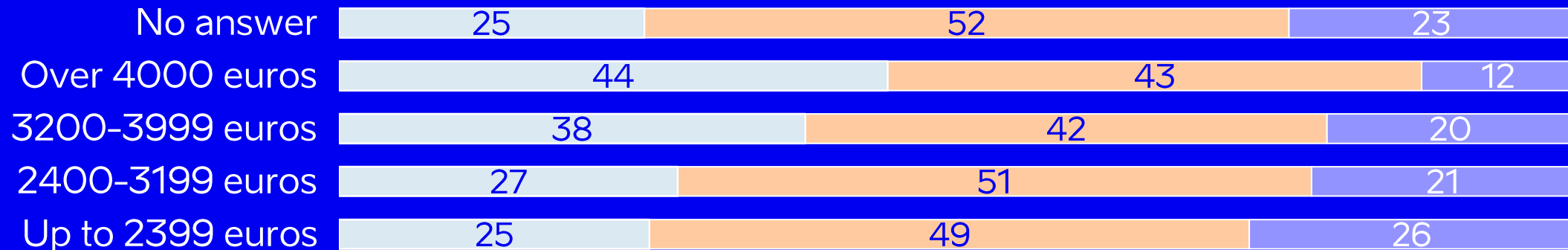
- I'm interested in visiting the Baltics for a holiday within the next 3 years
- I'm interested in finding out more about the Baltics to decide if I want to visit them
- I'm not interested in visiting the Baltics or finding out more



## Respondents who expect to go on leisure trips abroad...

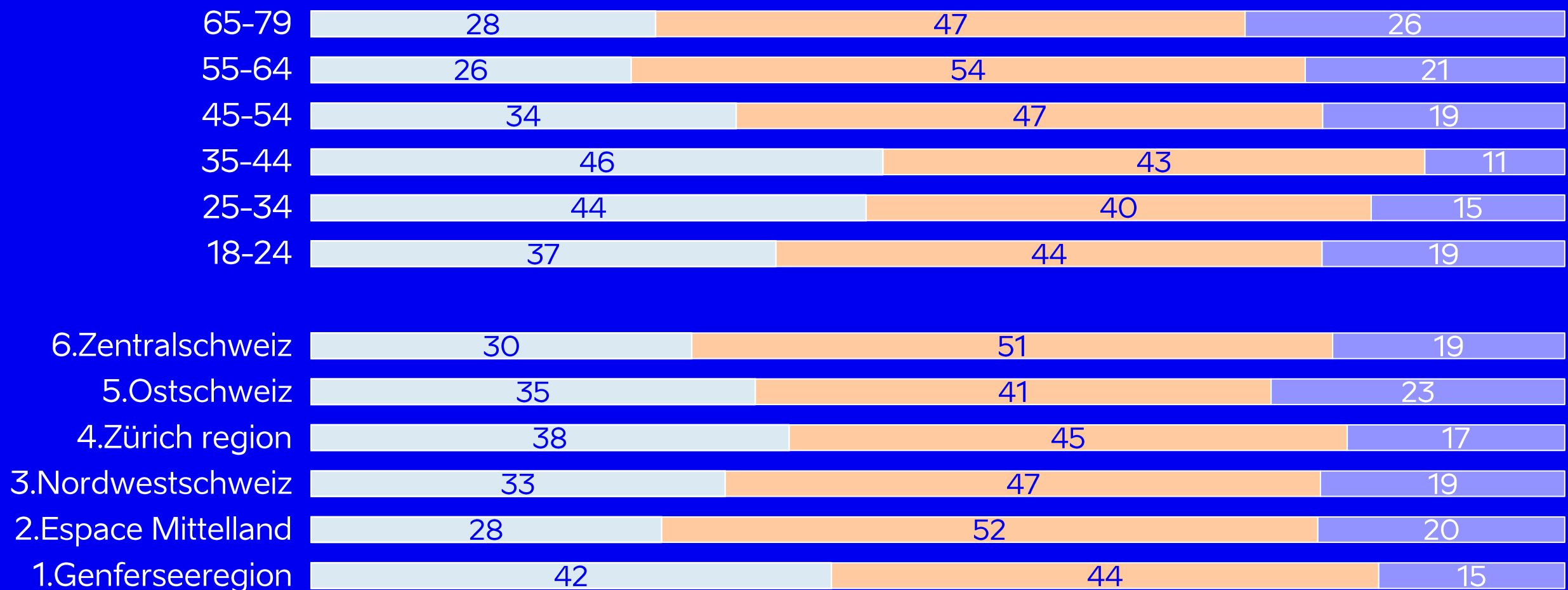


## Net income per household member per month



# What would best describe your position about travelling to the Baltic countries for holidays? (%)

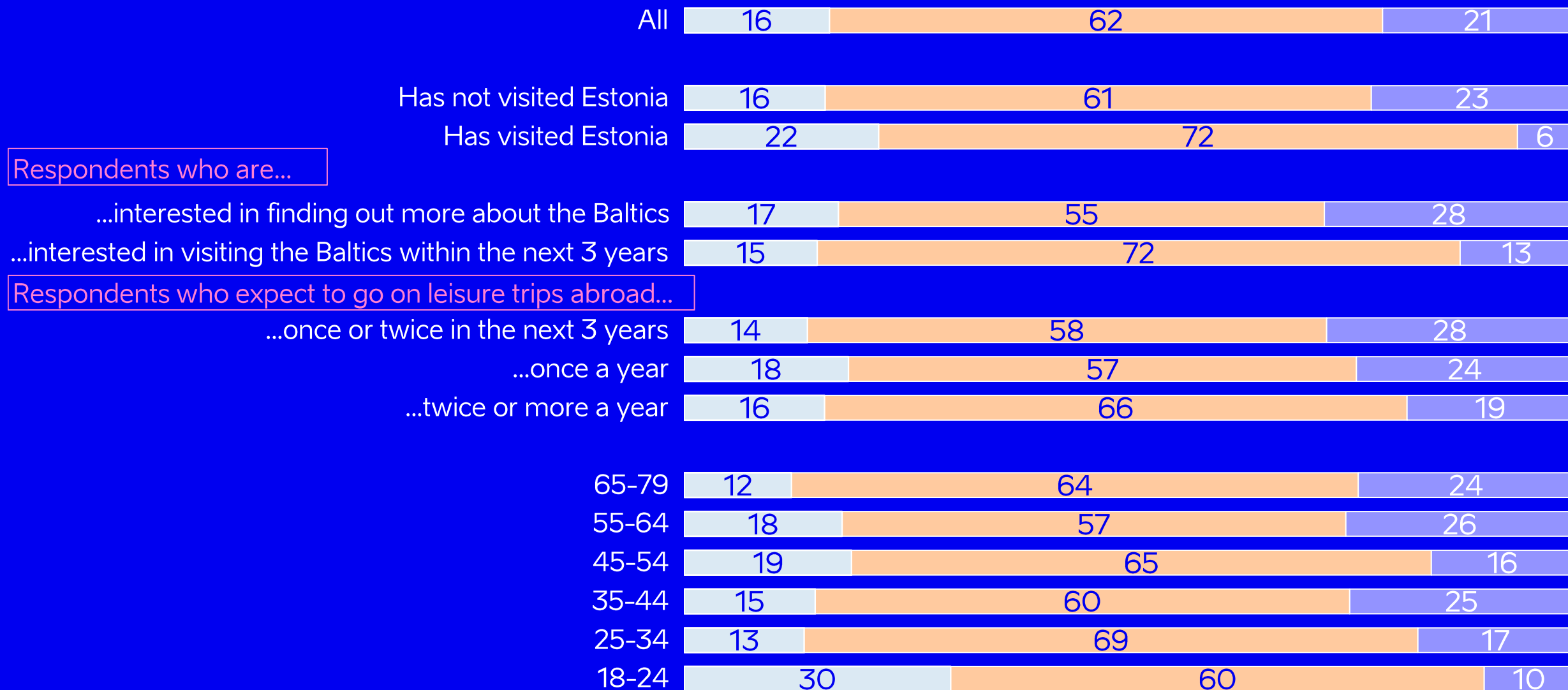
- I'm interested in visiting the Baltics for a holiday within the next 3 years
- I'm interested in finding out more about the Baltics to decide if I want to visit them
- I'm not interested in visiting the Baltics or finding out more





# If you decided to take a holiday to Estonia, what would you most likely do? (%)

■ visit Estonia only   ■ visit Estonia and some other countries in the same region during the same trip   ■ no preference



# Why would you be interested in the Baltic countries? (open question)

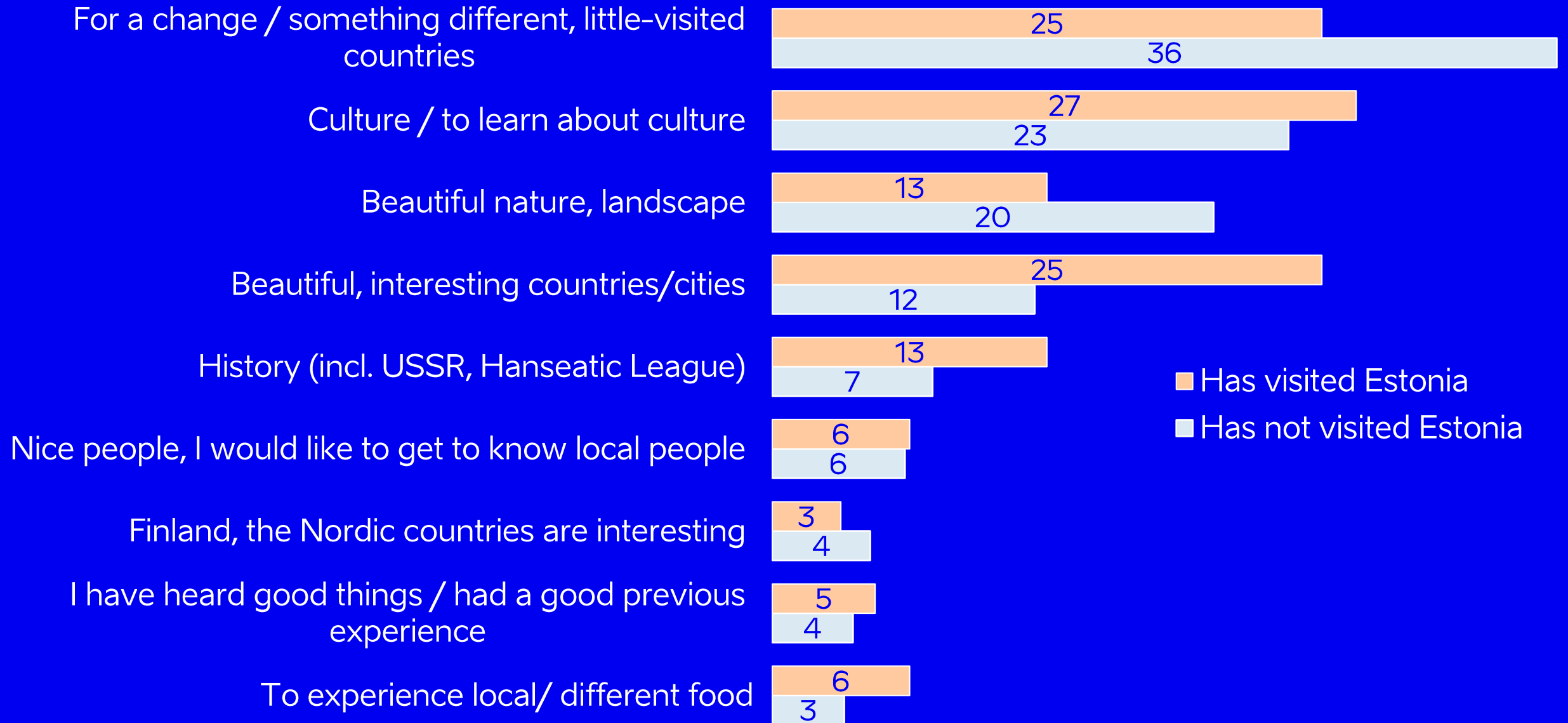
- Those who are interested in the Baltic countries were asked in an open question why they were interested in the Baltics. The most frequently mentioned topics were:
- They just like travelling and **discovering new countries** / as many countries as possible, their culture and nature. The Baltic States arouse interest because they are little known to many, and therefore considered to be less crowded and less touristy than mainstream destinations. Therefore, it would be exciting to visit the Baltic States **for a change, to see something different** and less typical. In total, 35% of respondents mentioned the factors grouped here (rather more those who have not visited Estonia).
- **Culture** was mentioned in some context by 24% - mostly that it would be exciting to learn about a culture that was unknown to them and different from their own. Culture was mentioned slightly more by respondents who had visited Estonia.
- **Nature** was mentioned slightly less than culture (19%). Many respondents mentioned both nature and culture. In most cases, a specific interest in nature was not mentioned, but rather a general desire to see Estonia's beautiful landscapes and scenic spots. Nature was mentioned somewhat more by those who had not visited Estonia.
- 13% mentioned beautiful, interesting countries/cities as a reason (of the cities, Riga was the most mentioned).
- 8% cited interest in history - general interest in history or the fact that the Baltic States have had an interesting history due to the influence of various powers, also different connections/ periods were mentioned: e.g. Hanseatic League, USSR.
- 6% mentioned nice people or interest in getting to know people. 4% said that they were interested in the Nordic countries/ Finland, therefore the Baltic States were also of interest. 4% said that they have good impressions of the Baltic countries from their own travels (to some Baltic countries), from other people's experiences or from what they have seen on TV. 4% want to experience local food - but food in Estonia was not mentioned as a separate motivation for travelling, rather they are interested in learning about / experiencing new foods as part of the travel experience (in combination with other factors, e.g. culture or nature).

# Why would you be interested in the Baltic countries? (open question, % of respondents)



N=826 (respondents who are interested in visiting the Baltics for a holiday within the next 3 years or finding out more about the Baltics)

# Why would you be interested in the Baltic countries? (open question, % of respondents)



N=826 (respondents who are interested in visiting the Baltics for a holiday within the next 3 years or finding out more about the Baltics)

# Examples of open-ended responses:(1)

- Their history, literature, architecture and landscapes interest me.
- The history of these countries; not so many tourists; close to the sea.
- History, visiting new places, sights, adventures.
- These countries are very interesting in terms of cultural history. What has happened there in the last 200 years interests me a lot.
- Interesting old European culture, hidden for a long time because of the Iron Curtain, beautiful nature.
- Interesting countries with a lot of history and beautifully preserved capitals.
- Not yet too touristy, different culture, history, current political context, landscapes, Baltic Sea.
- Because these countries were unheard of during the Soviet Union and have a history. They are also said to be beautiful. Last year we visited Sweden, now it's time to see some others (in this region).
- Rich history, located close to us, not expensive.
- Historical reasons (Hanseatic League), dynamic countries, near the sea.
- Beautiful architecture, beautiful landscape, interesting culture.
- Easy to travel. Very friendly people. Inexpensive. Beautiful towns, lots of historical buildings and churches.
- Situated in Europe and historically I am also interested in Hungary, Poland and the Czech Republic, which I already know.
- I find the mix of cultures there interesting. For example, they were important trading centres in the Middle Ages, these countries were formerly part of the Soviet Union, and now the West has an important influence on them.
- Interesting history and culture, modern, open countries, still unknown to me in terms of culinary. Possible to integrate into a Baltic cruise. The immediate future of these countries is a bit uncertain.

# Examples of open-ended responses: (2)

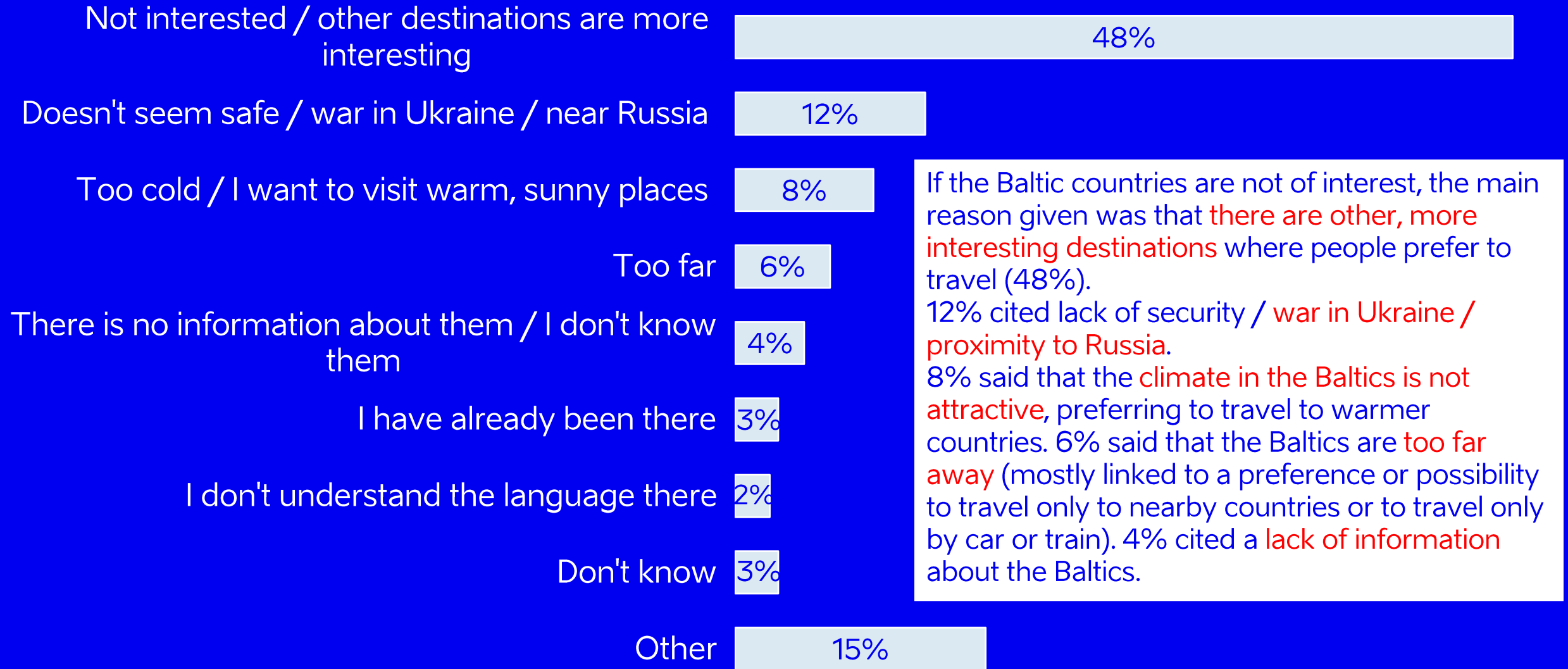
- They are in a dynamic development after leaving the Soviet Union - their culture interests me.
- There are many beautiful things in every country, and I like to discover new cultures.
- Friends say it's a wonderful region.
- Nature, culture and not too hot.
- Beautiful in terms of landscape, probably inexpensive, suitable for caravan holidays. We will definitely visit if the war won't spread.
- I like it there, lots of nature, few people, Baltic Sea.
- The nature, the geographical location, what I've heard about the nice people, and because I have the feeling that these countries are not yet flooded with tourists.
- I know from other people's stories that these countries are very beautiful and have many unknown sights.
- I'm generally interested in foreign cultures, buildings, landscapes and people.
- Unknown Nordic countries, beautiful old cities, beautiful design, near the water, currently in development.
- I didn't have a chance to see everything last time I was there.
- It's a close and interesting destination, which I know very little about, but I loved being in Finland.
- The old Hanseatic towns, the forests, the scenery, the food.
- I don't know the area at all yet, but I've seen some nice reportages about it.
- Judging by the GEO reportage, beautiful scenery.
- I saw a documentary, very beautiful nature.
- A colleague of mine has often travelled to eastern countries including Estonia, very interesting from what he tells.
- I've heard a lot about it already and saw an interesting report. I would like to learn as much as possible about different cultures.



# Examples of open-ended responses: (3)

- Because my friends are from there.
- I know people from those countries, and I'm interested in their history.
- I really like the Nordic countries in general.
- The cool Nordic countries are exciting for me.
- The cultures of these three countries are certainly interesting and have their own influences because of their northern, eastern and western European location.
- I'm attracted to everything north of Switzerland because I've never been disappointed, and I've always been fascinated.
- Finland with its wild nature and the other Baltic countries for their history.
- I've always enjoyed travelling and I love discovering new countries and cultures.
- Because these are the last countries I haven't visited in Europe and their landscapes look stunning.
- Something different for a change.
- Something other than the Mediterranean for a change.
- I'm always open to new things, and so far I've only heard good things about these countries.
- To get to know the unknown for a change. Perhaps to make one trip that is less mainstream.
- Because they are little known and not too touristy.
- So far I have always travelled south and would love to learn more about the northern countries.
- I would like to travel to as many countries as possible, discover new cultures.
- I would like to see the whole world.
- I'm interested in new countries that I don't know.
- I've already been to 70 countries and still have a few more to go.
- The chance to discover something new and add a country to the list of countries I've visited.

# Why would you not be interested in the Baltic countries? (open question)



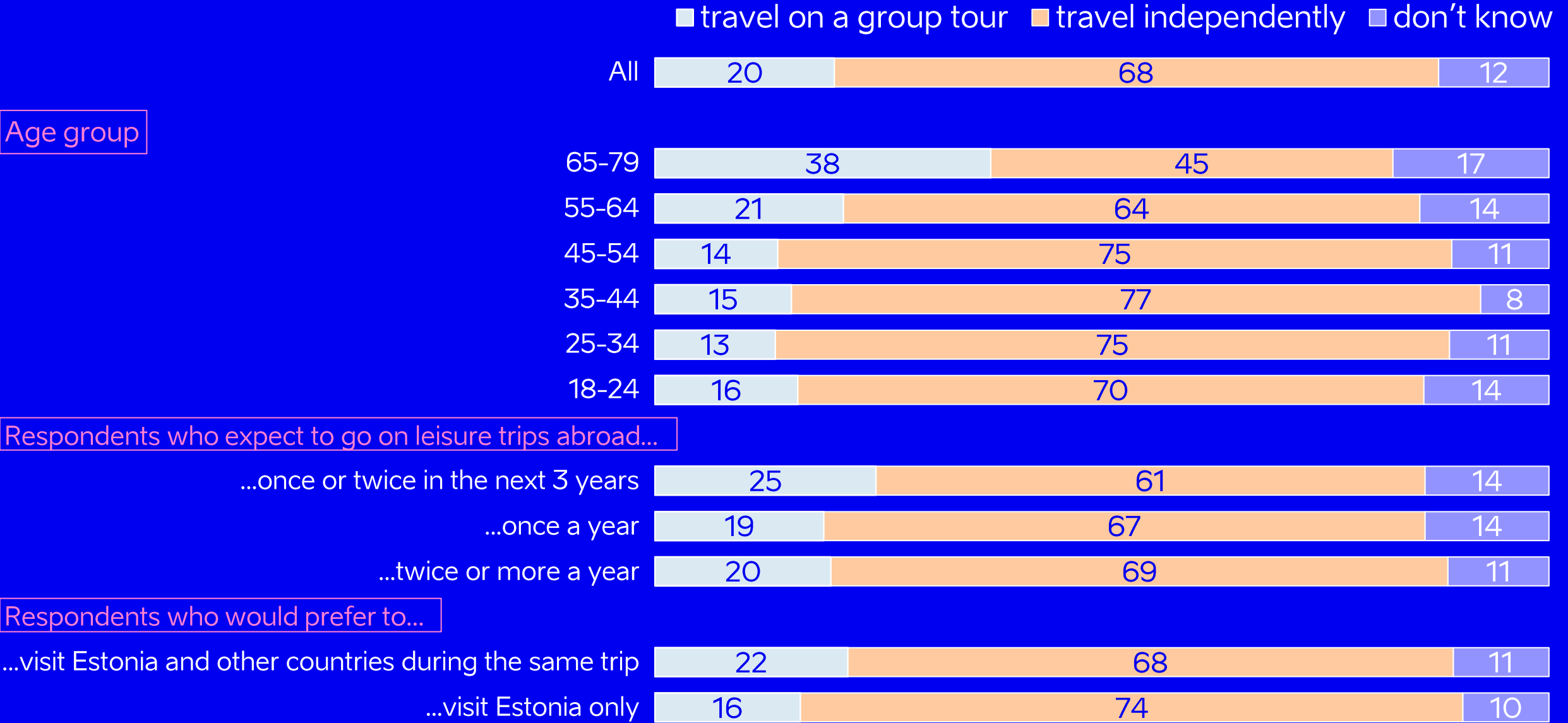
# Examples of open-ended responses:

- I don't know what there is to see.
- I don't know anything about it and I've never heard of it.
- Because I don't know anything about them.
- I don't know enough about these countries right now. So there's nothing that would attract me there.
- There are more interesting places.
- I prefer to travel south.
- I'm rather sceptical about the eastern regions.
- I'm not attracted to those countries. I'm more attracted to the US, for example.
- There are other countries I would like to visit first.
- Finland would still be suitable, but the Baltic States are too Eastern European for me.
- I prefer to use my resources for Africa.
- I prefer to travel to Asian countries.
- I always spend my holidays in the same place in Spain.
- I don't plan any more flights for years, I would only travel by train or car.
- Too far away.
- Little sunshine, unfriendly people.
- Too close to Russia, too cold.
- Currently a crisis area.
- Too close to Russia. I prefer to travel to the seaside (Egypt) or to the mountains (Switzerland, Austria).
- Because of the current situation (Russia/Ukraine). Suddenly Putin will march in there too.
- It's too dangerous there now, let's wait for the end of the war.
- Too precarious at the moment.
- Too expensive for me at times.
- Too far north.
- I'm just fascinated by gastronomy and can't think of a single dish that comes to mind from this region.
- I'm very disturbed by the political attitude of the Baltic States towards Russia. Under these circumstances, I don't want to support them financially with my trip. It is a pity in general, because the Baltic States are interesting in principle.
- I have already visited the Baltic States and cannot afford to do so any more, but it was wonderful.
- My trip to the Baltic States was already very extensive and I enjoyed it very much.

# Preferences when travelling to Estonia

- Of those who are or might be interested in visiting Estonia, 68% would prefer to travel independently and 1/5 on a group tour. 12% had no preference.
- Travelling independently is the overwhelming preference for all age groups, with the exception of 65–79-year-olds, 38% of whom would prefer to travel on a group tour and 45% independently.
- Among 55–64-year-olds, 21% would prefer a group tour and 2/3 would prefer an individual trip, while 3/4 of the younger groups would prefer to travel independently.
- Respondents who travel abroad less than once a year are slightly more likely to prefer a group tour (1/4) than those who travel more often (1/5).
- Among those who would prefer to combine a visit to Estonia and some other neighbouring countries, there is a slightly higher preference for a group tour compared to those who would prefer to visit only Estonia.
- Of those who are or might be interested in visiting Estonia, 30% would book using a travel consultant at a tour operator / local travel agency, 24% would book online at a tour operator's / travel agent's website and 34% via another online channel. 12% had no preference.
- Preferences mainly depend on age. The younger the age group, the less likely they are to use a travel agency. Among 65–79-year-olds, 45% would book with a travel consultant and 18% would book online at a travel agent's website, while only 19% would book via another online channel. By contrast, only 18% of 18–24-year-olds would book with a travel consultant, while 48% would book through another online channel.
- The more frequently respondents travel abroad in general, the more likely they are to book through another online channel. Respondents with incomes below €3,200 would be slightly more likely to use a travel consultant compared to those with higher incomes.

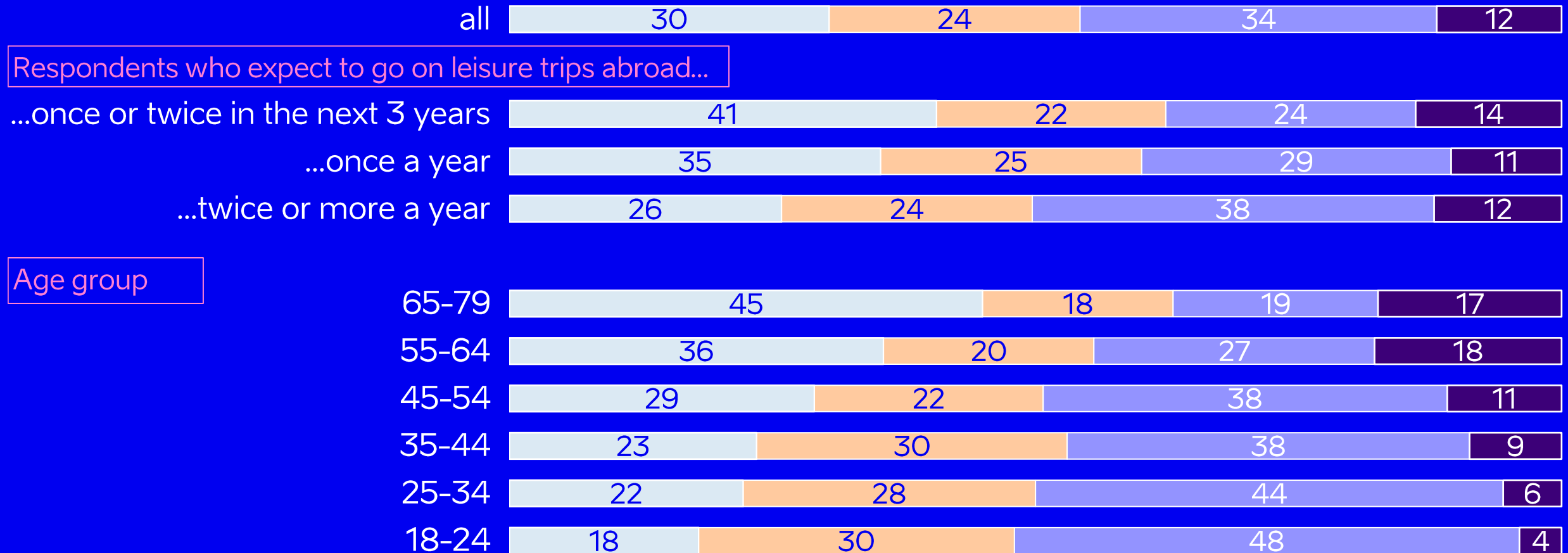
If you decided to take a holiday to Estonia, would you prefer to travel on a group tour or independently? %



N=826 (respondents who are interested in visiting the Baltics for a holiday within the next 3 years or finding out more about the Baltics)

If you decided to take a holiday to Estonia, how would you most likely book your trip? (%)

- using a travel consultant at a tour operator / local travel agency
- booking online at a tour operator's / travel agent's website
- booking via other Internet channels (e.g. booking.com)
- no preference

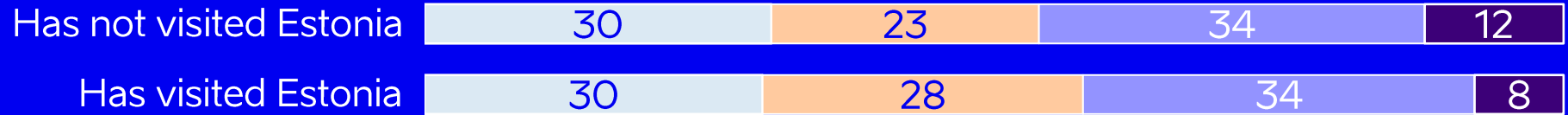


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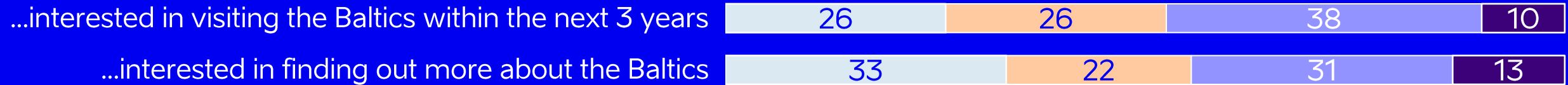


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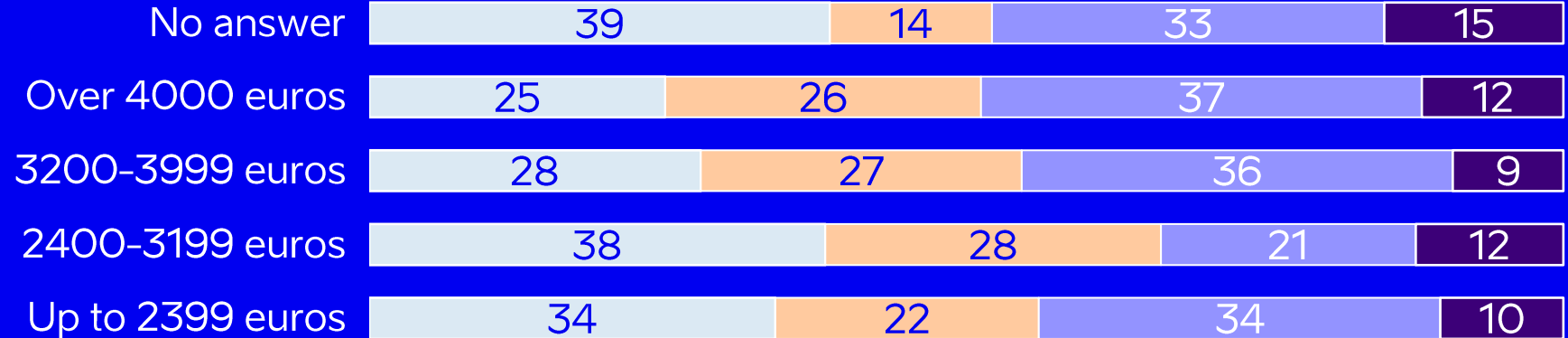
- using a travel consultant at a tour operator / local travel agency
- booking online at a tour operator's / travel agent's website
- booking via other Internet channels (e.g. booking.com)
- no preference



## Respondents who are...



## Net income per household member per month



N=826 (respondents who are interested in visiting the Baltics for a holiday within the next 3 years or finding out more about the Baltics)

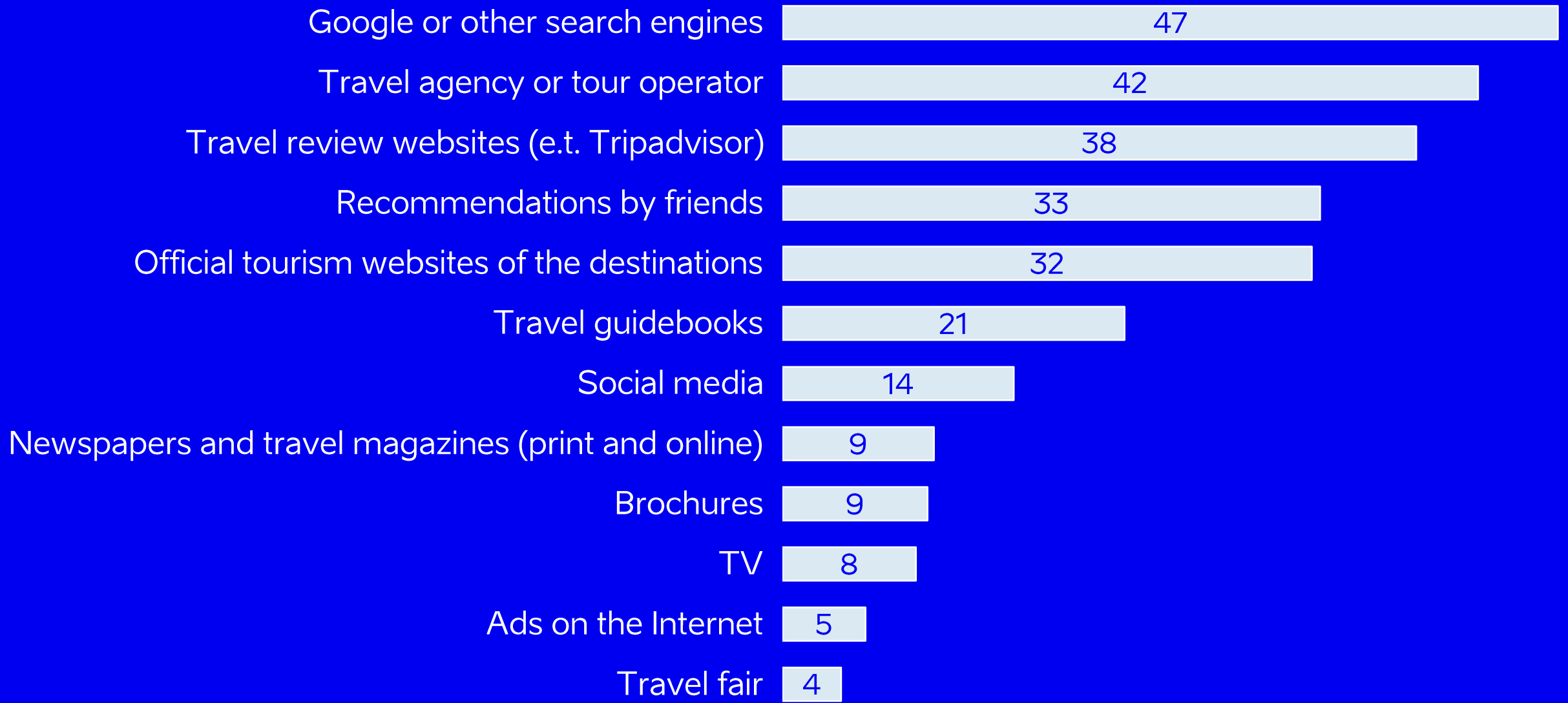
## Sources of inspiration when planning a trip abroad

- The main sources of inspiration for planning a trip abroad are Google and other search engines (47%), travel agencies or tour operators (42%), travel review websites (e.g. Tripadvisor) (38%), recommendations from friends (33%) and official websites of destinations (32%).
- 18–24-year-olds get most of their inspiration from search engines and social media, 25–54-year-olds from search engines and travel reviews, 55–64-year-olds from travel agencies and search engines, 65–79-year-olds from travel companies and official websites of destinations.
- The younger the age group, the more important search engines and social media are for them. The older the age group, the more important for them are travel agencies, official websites of destinations and publications (travel books, brochures, press).

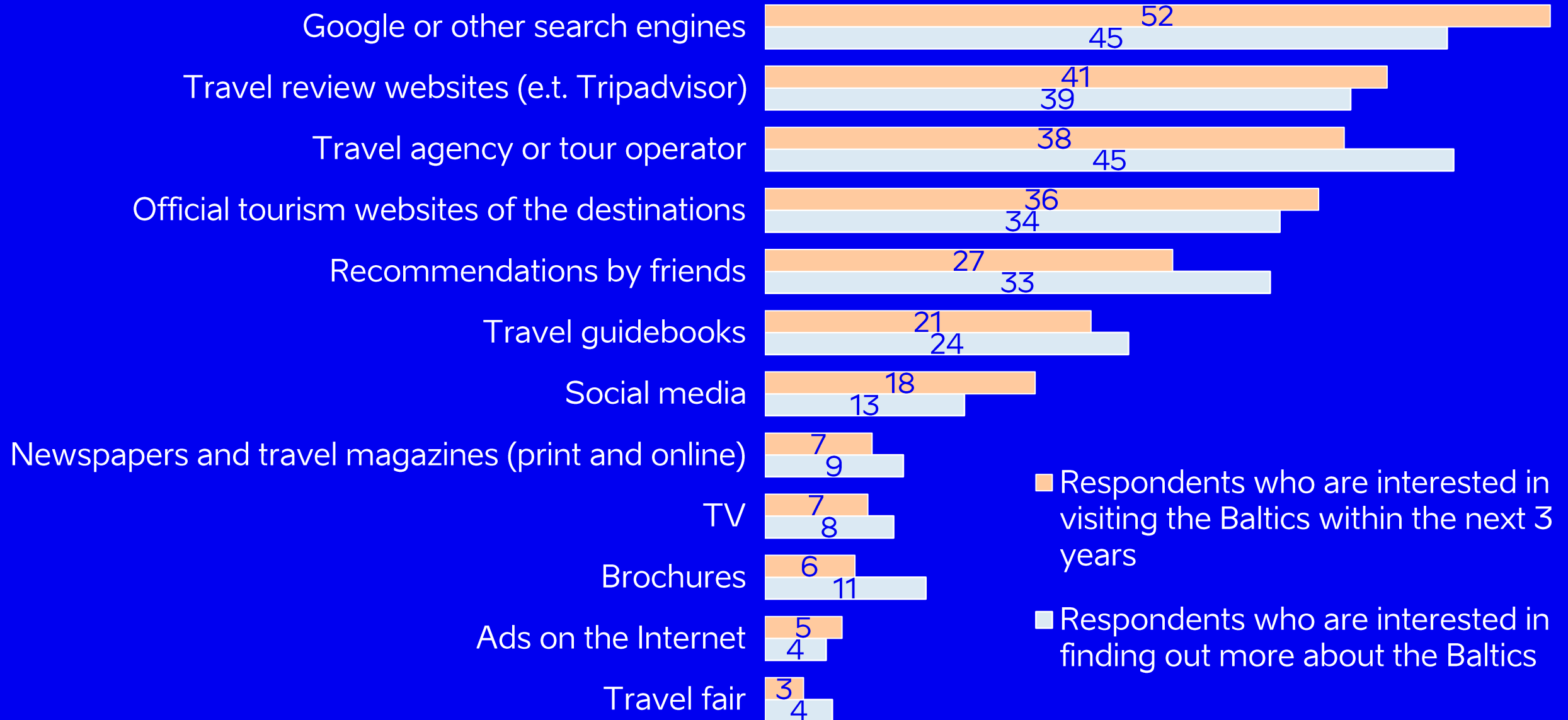
## Willingness to compensate for the ecological footprint to the destination

- On their next trip abroad 27% are not prepared to donate to a sustainable project in their destination to compensate for the ecological footprint of their trip. 22% are willing to donate €1-4, 22% would donate €5-9 and 29% would donate €10 or more.
- Those aged 65-79 are willing to donate more than the average, with as many as 42% willing to contribute at least €10.
- Women would also be willing to donate more than men: 57% of women would donate €5 or more, compared to 44% of men.
- The level of income and the frequency of travelling abroad did not play a significant role in this question.

## 3 most important sources of inspiration when planning a holiday abroad, %

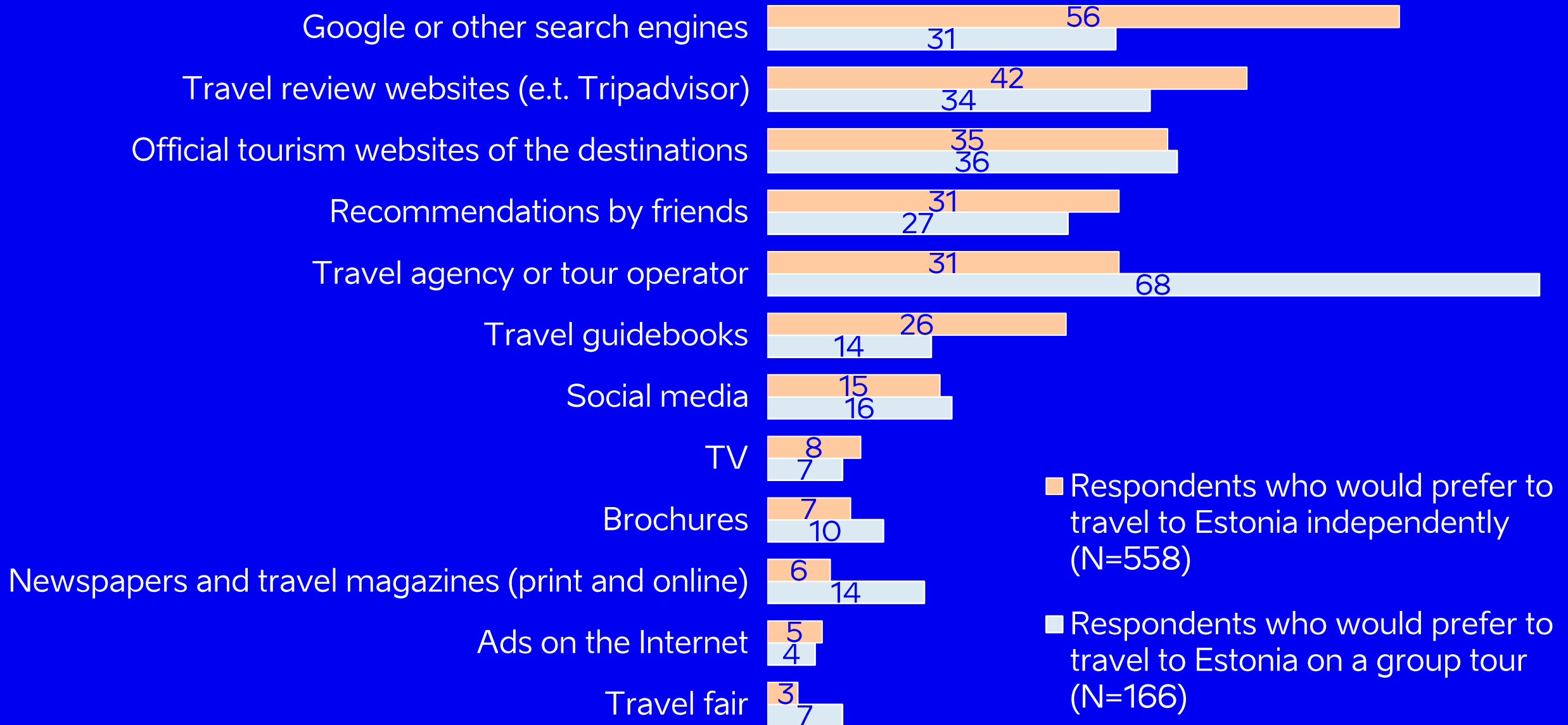


## 3 most important sources of inspiration when planning a holiday abroad, %



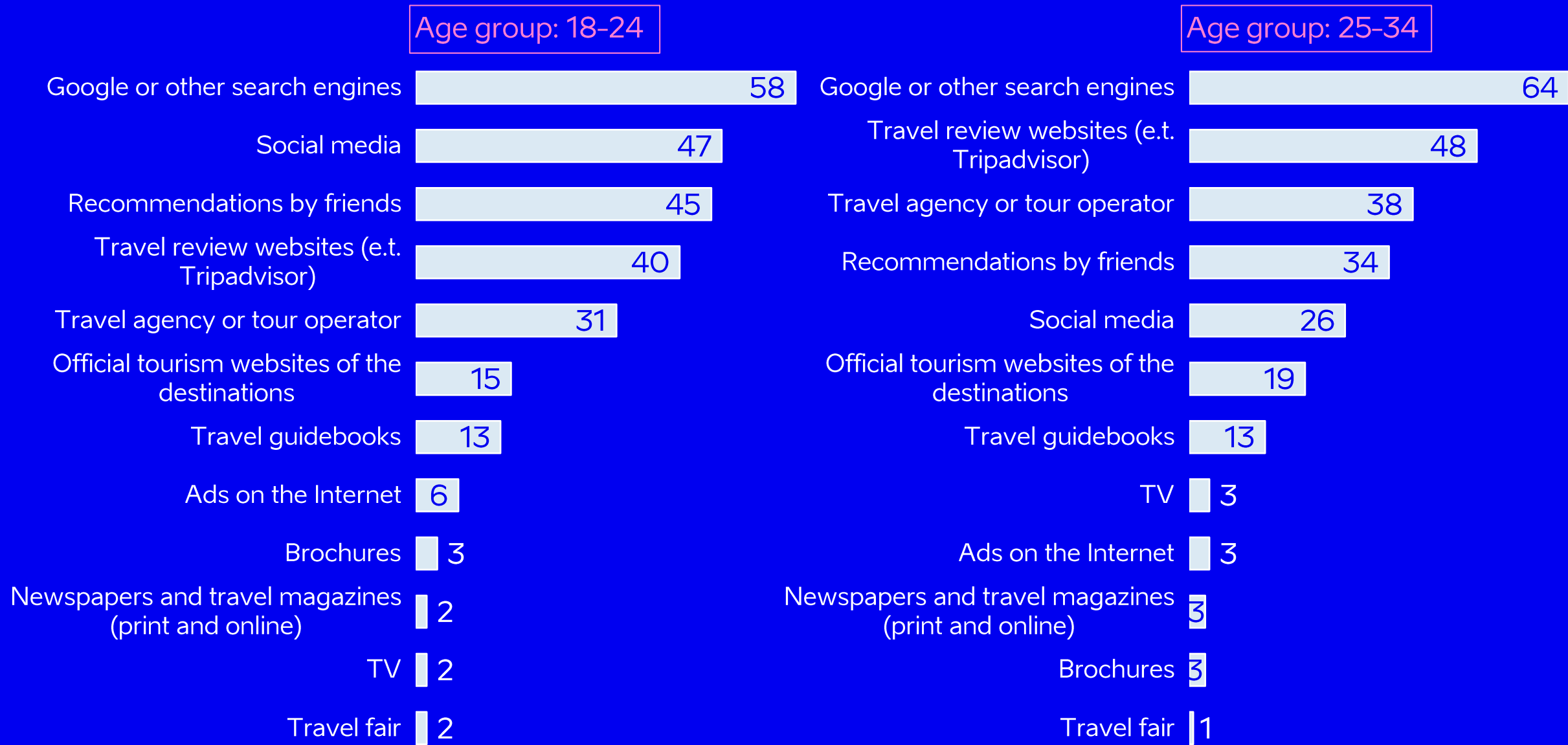
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## 3 most important sources of inspiration when planning a holiday abroad, %



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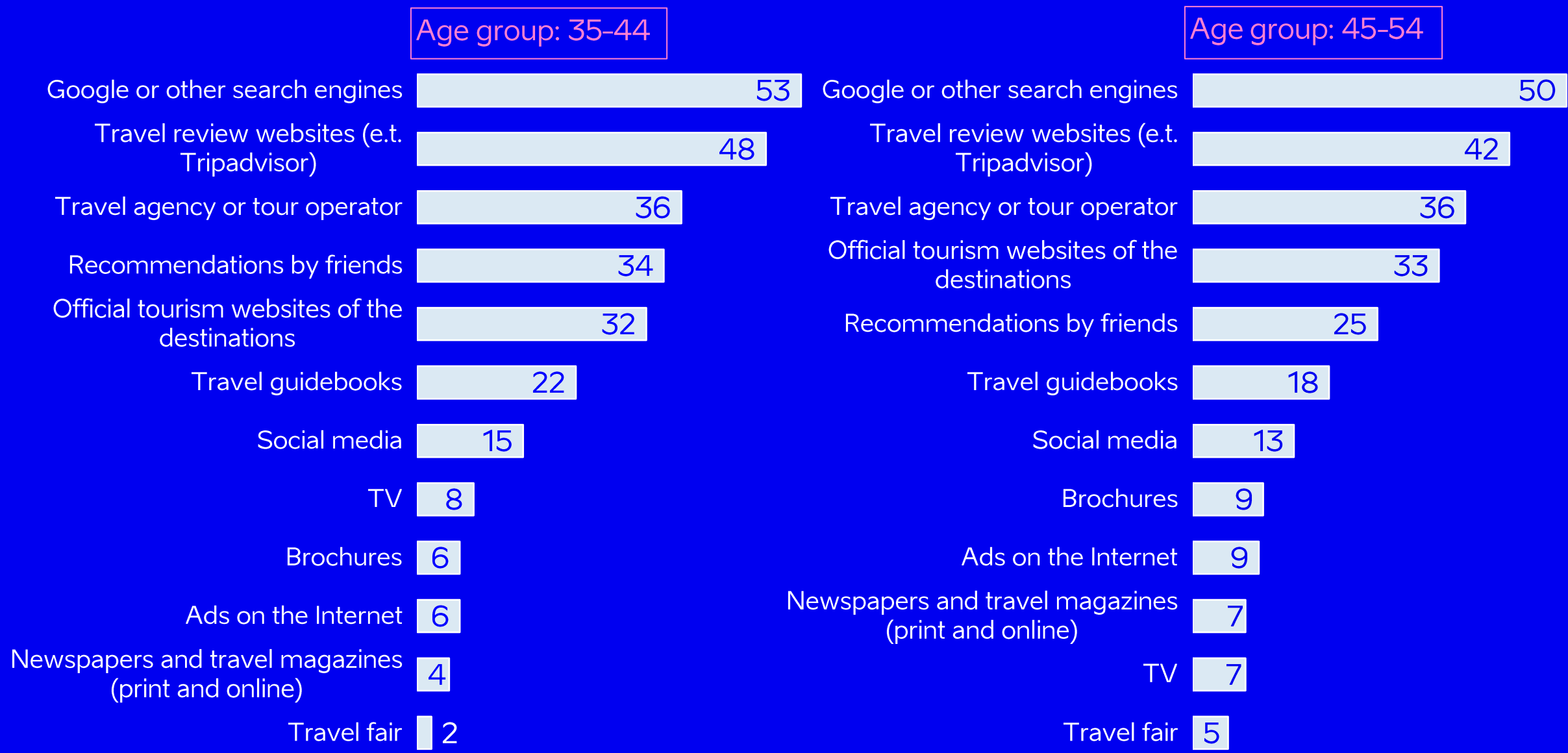
# 3 most important sources of inspiration when planning a holiday abroad, %



N=1015 (respondents who expect to go on leisure trips abroad in the next 3 years)

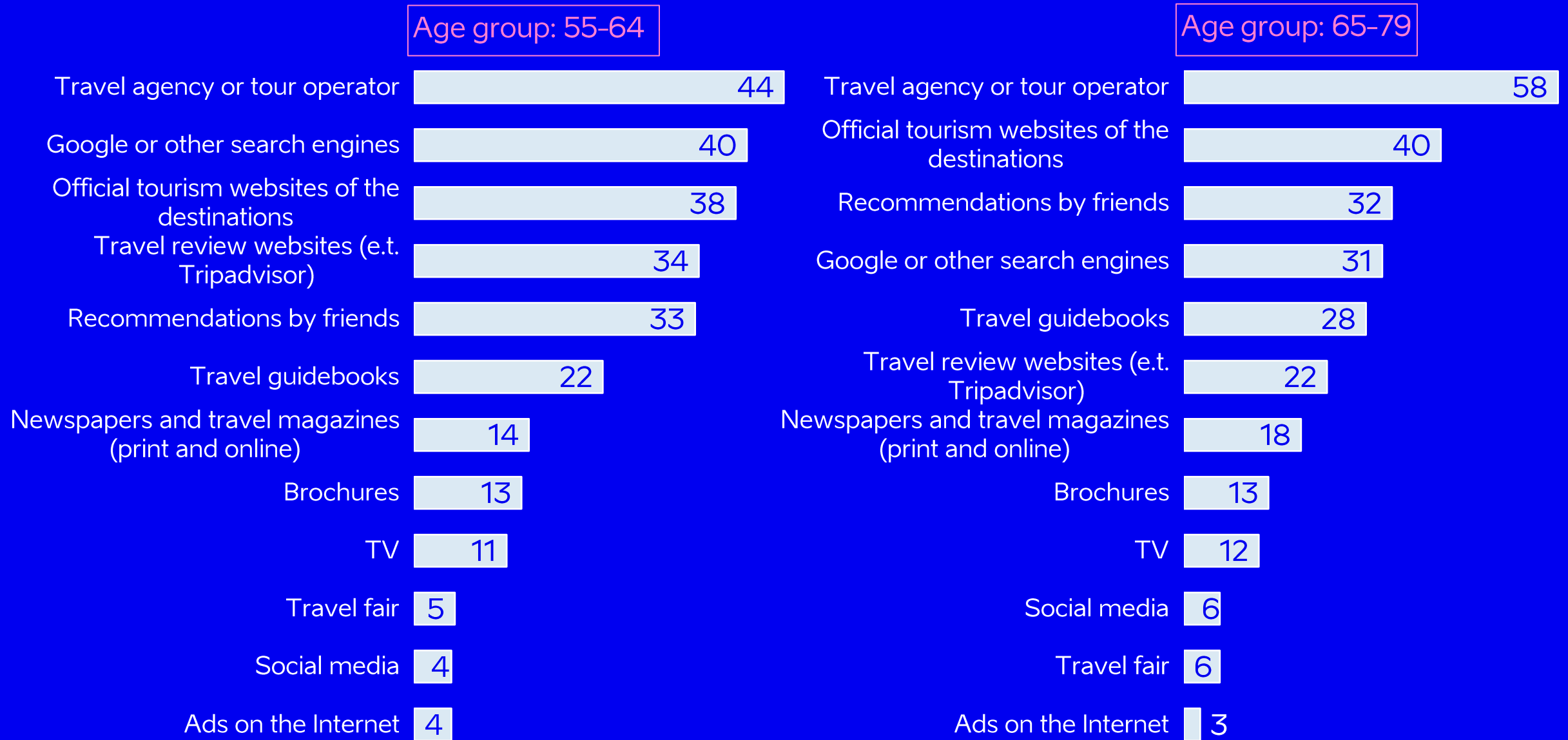


# 3 most important sources of inspiration when planning a holiday abroad, %



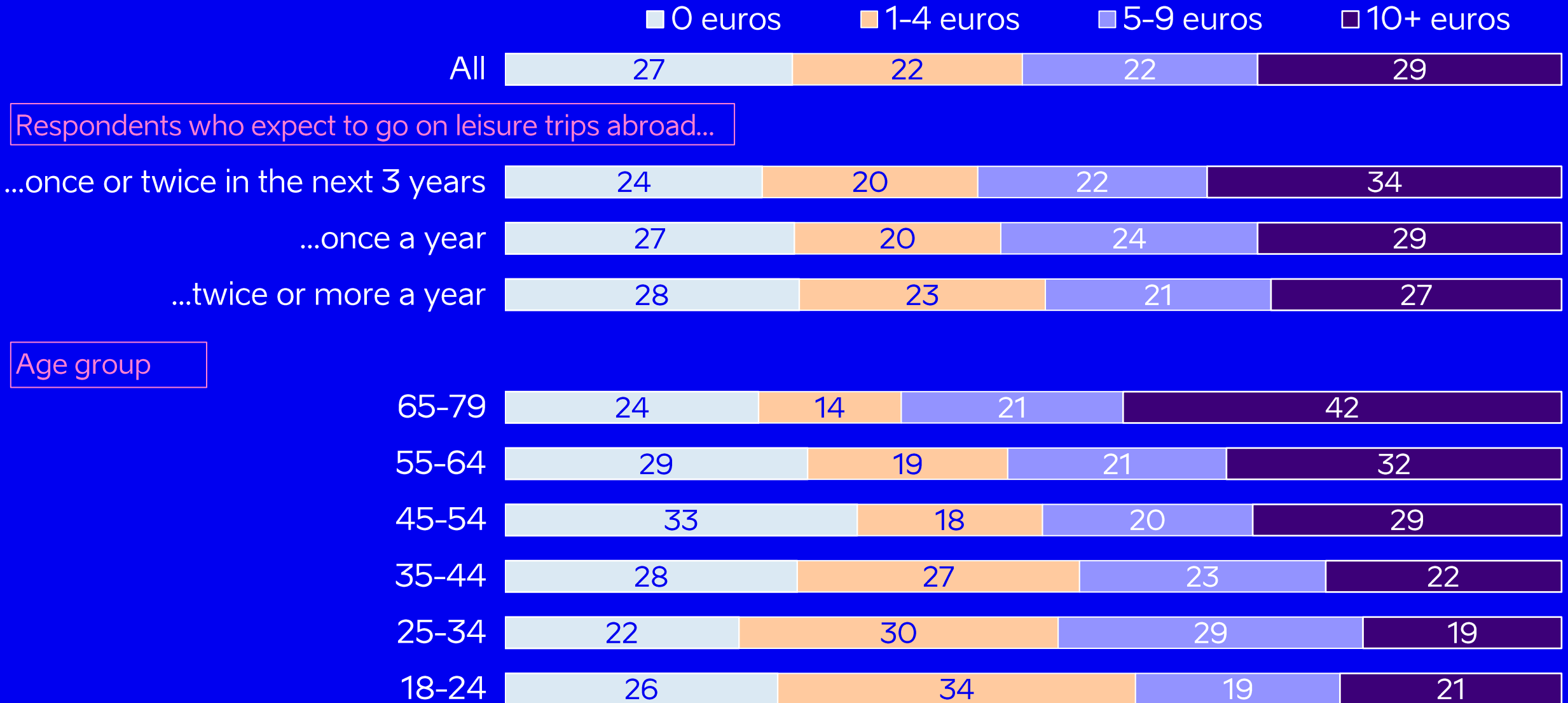
N=1015 (respondents who expect to go on leisure trips abroad in the next 3 years)

# 3 most important sources of inspiration when planning a holiday abroad, %



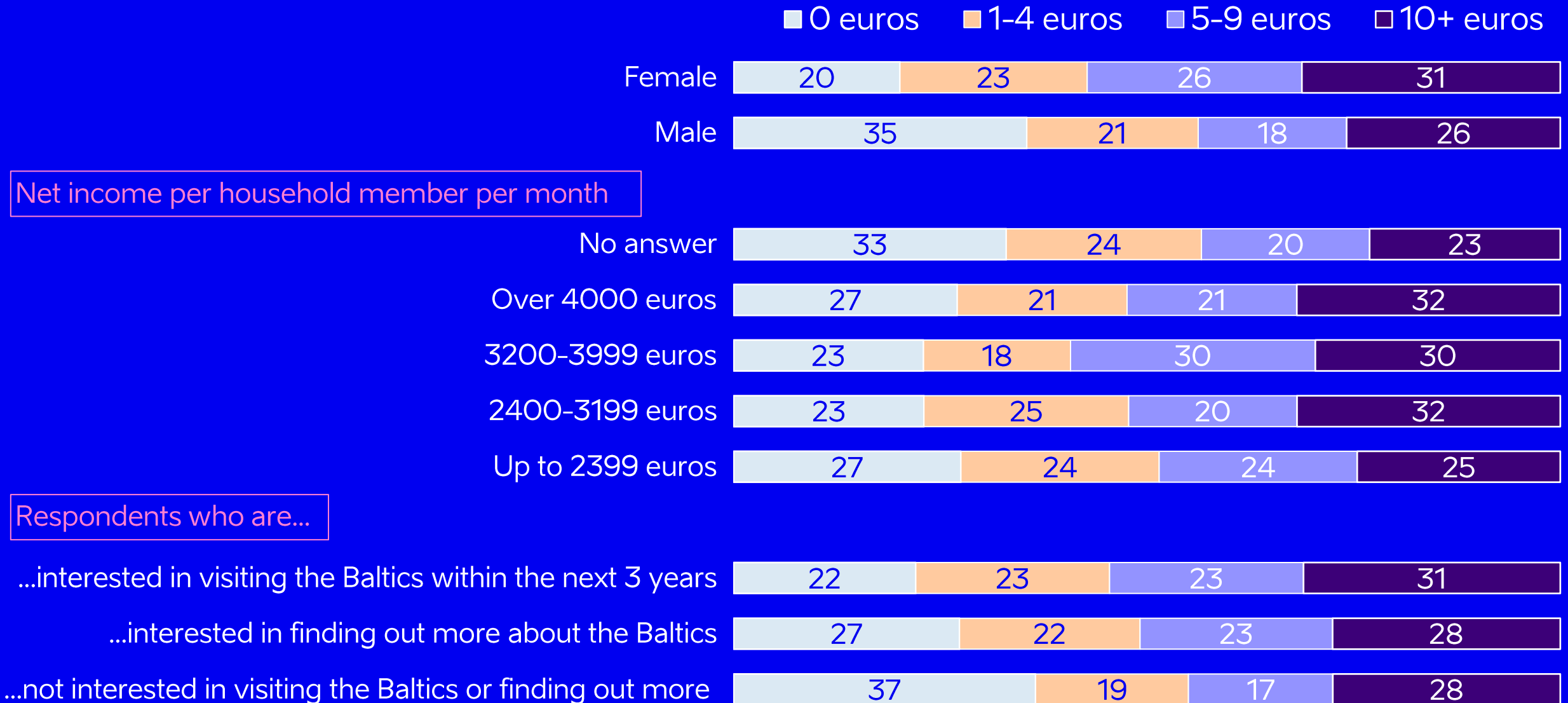
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On your next trip abroad, how much are you ready to donate to a sustainable project in your destination to compensate for the ecological footprint (CO2 emissions) of your trip? (%)



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