

DESTINATION EUROPE

Long-Haul Travel Barometer



Edition 8/2017

In 2015, the United States of America ranked second as the largest outbound travel market and spender in the world (after China) accounting for 74 million outbound trips and a total spent of US\$ 113 billion*. Outside North America, Europe is a main holiday destination for US citizens. Generating around 26% of all outbound travel in 2016**. To preserve and increase the interest of the potential US travellers in Europe, destinations need to understand the motivations and expectations of these holidaymakers and to effectively promote the pool of experiences the region has to offer.

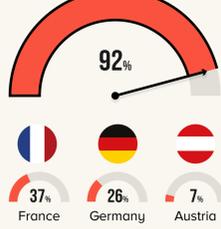
*UNWTO - Tourism Highlights (2016)

**ETC Dashboard - Tourism Economics

This issue of the Long-haul Travel Barometer focuses on the profile of potential holiday visitors from the USA, shedding light on their destination preferences and priorities. The majority of American respondents see France (37%), Italy (31%) and Germany (26%) as the most probable destinations for their next trip to Europe. The region's nature, renowned attractions, historical and cultural heritage and gastronomic delicacies are perceived as major reasons for visiting the region in the future.

AMERICAN TRAVELLERS' INTEREST IS HIGH FOR VISITING WESTERN EUROPEAN DESTINATIONS

WESTERN EUROPE



92%* of American respondents who are interested in visiting Europe are attracted by destinations in the western part of the region.

France positions itself as the most-preferred European destination among 37% of the American citizens who took part in the survey. Germany (26%) appears to be very popular, while Austria (7%) ranks 3rd as the most appealing destination in Western Europe.

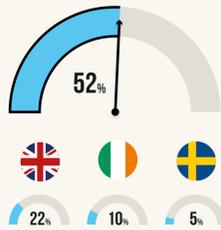
SOUTHERN/MEDITERRANEAN EUROPE

82% of respondents planning to take a journey to Europe have Mediterranean destinations as their preferred options.

For American survey respondents, Italy is a top "sough-after" destination within the Mediterranean and the second most preferred destination in Europe (after France) with nearly 1 in 3 (31%) Americans planning to visit the country during their next holiday in Europe. Italy is trailed by Spain (18%) and Greece (9%), both considered the most appealing destinations in Southern Europe.



NORTHERN EUROPE



More than half of American respondents (52%) who expressed their intention of visiting Europe in the future have planned to spend time in a Northern-European destination.

The United Kingdom (22%), Ireland (10%) and Sweden (5%) are among the first destination choices.

CENTRAL/EASTERN EUROPE

Although Central and Eastern Europe are not as well established in the mindset of American visitors as the rest of Europe, they still appear in the travel wish-list of 19% of the American surveyed participants.

The destinations mentioned the most in these regions are Poland (4%), Hungary and Czech Republic (both 3%)



*Sample Size: 3429

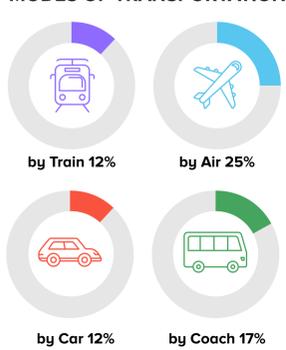
** Western Europe: France, Germany, Austria, Switzerland, the Netherlands, Belgium and Luxembourg. Southern/Mediterranean Europe: Italy, Spain, Greece, Portugal, Turkey, Croatia, Malta, Cyprus, Montenegro, Slovenia, San Marino and Monaco. Northern Europe: United Kingdom, Ireland, Sweden, Norway, Denmark, Iceland and Finland. Central/Eastern Europe: Poland, Hungary, Czech Republic, Romania, Bulgaria, Estonia, Slovakia, Lithuania, Latvia and Serbia.

HOW DO DIFFERENT GENERATIONS OF US TRAVELLERS FORESEE THEIR TRIP IN EUROPE?

Younger Travellers (18-34 years old)

70% of young US respondents prefer to go on a trip with their families or partners. When compared to other age groups, however, youngsters appear to be more enthusiastic about exploring Europe with friends.

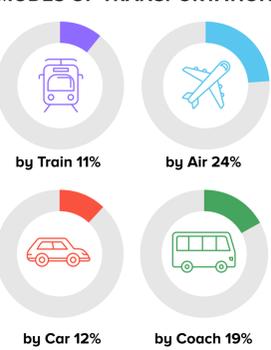
MODES OF TRANSPORTATION



Mature Travellers (34 - 49 years old)

Among all respondents, mature travellers featured the highest intention to travel to Europe with their families (43%) and the lowest interest in solo travel (16%).

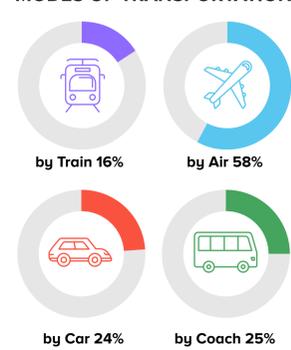
MODES OF TRANSPORTATION



Senior Travellers (50 years and over)

Nearly 1 in 2 (49%) senior respondents mentioned that they are likely to travel to Europe with their spouse only. This group also showed the lowest interest in travelling with their family and the highest enthusiasm to explore the region by themselves.

MODES OF TRANSPORTATION



*Values in the charts reflect respondents' likelihood to take the displayed modes of transport during their stay in Europe. Sample Sizes: 18-34 (1043), 34-49 (806), 50 years and over (337)



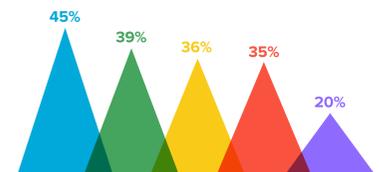
*Sample Size: 3429

- Enjoy Europe's nature
- See renowned attractions
- Learn more about the history and cultural heritage
- See as much as possible in a short time
- Immerse in the local culture
- Relax and recharge in special surroundings
- Taste the cuisine and gastronomic products
- Holiday experience including outdoor activities
- Shop for luxury brands, designer products
- Acquire new skills in a different setting
- Look for spiritual experience

Sample Size: 3429

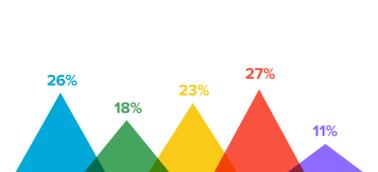
MORE THAN 2 IN 5 (45%) AMERICAN RESPONDENTS ARE LIKELY TO BOOK A ROUND TRIP TO EUROPE THROUGH A TOUR OPERATOR OR A TRAVEL AGENT

Book a round trip through a tour operator (TO) or travel agent (TA)*



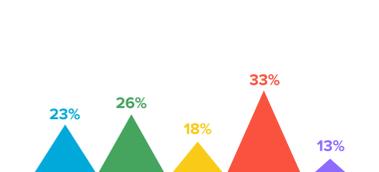
Compared to respondents from Brazil, China, Japan and Russia, Americans showed a higher intention to use the services of a Tour Operator (TO) or a Travel Agent (TA). More than 2 in 5 (45%) state that they would rather book a roundtrip to Europe through a TO/TA.

Purchase a package that includes travel and accommodation through a TO or TA



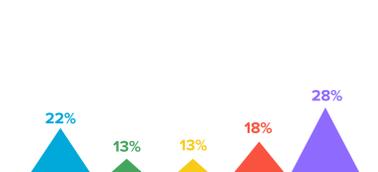
Holiday packages that include travel and accommodation services seem to appeal to 26% of American respondents. Another market expressing comparatively high intention to purchase these services through a TO and TA is the Chinese market (27%).

Purchase full-travel package from a TO or TA**



Chinese, Brazilian and American responders are more likely to book a full-travel package to Europe through a TO or a TA, while Russian respondents had the lowest tendency to use professional tourism services to book a holiday.

The holiday is fully organised by the traveller



Nearly one-fourth (22%) of US survey participants displayed an intention to be in control of the organizational and booking aspects of their future travel to Europe.

*Round trip refers to the transportation aspects of the holiday (e.g. flight tickets).

**Full travel package includes travel, accommodation and additional services (e.g. excursions, entrances, etc.)

Sample Sizes: US (1858), Brazil (2508), China (3005), Japan (1011), Russia (1570)

The Long-Haul Travel Sentiment Survey & Index captures people's intention to travel abroad, their motivations and barriers to travel, as well as key characteristics of their trip. It monitors travel sentiment in five key extra-European markets: Brazil, China, Japan, the Russian Federation and the USA. The survey is not meant to quantify prospect demand levels.

More information: www.etc-corporate.org