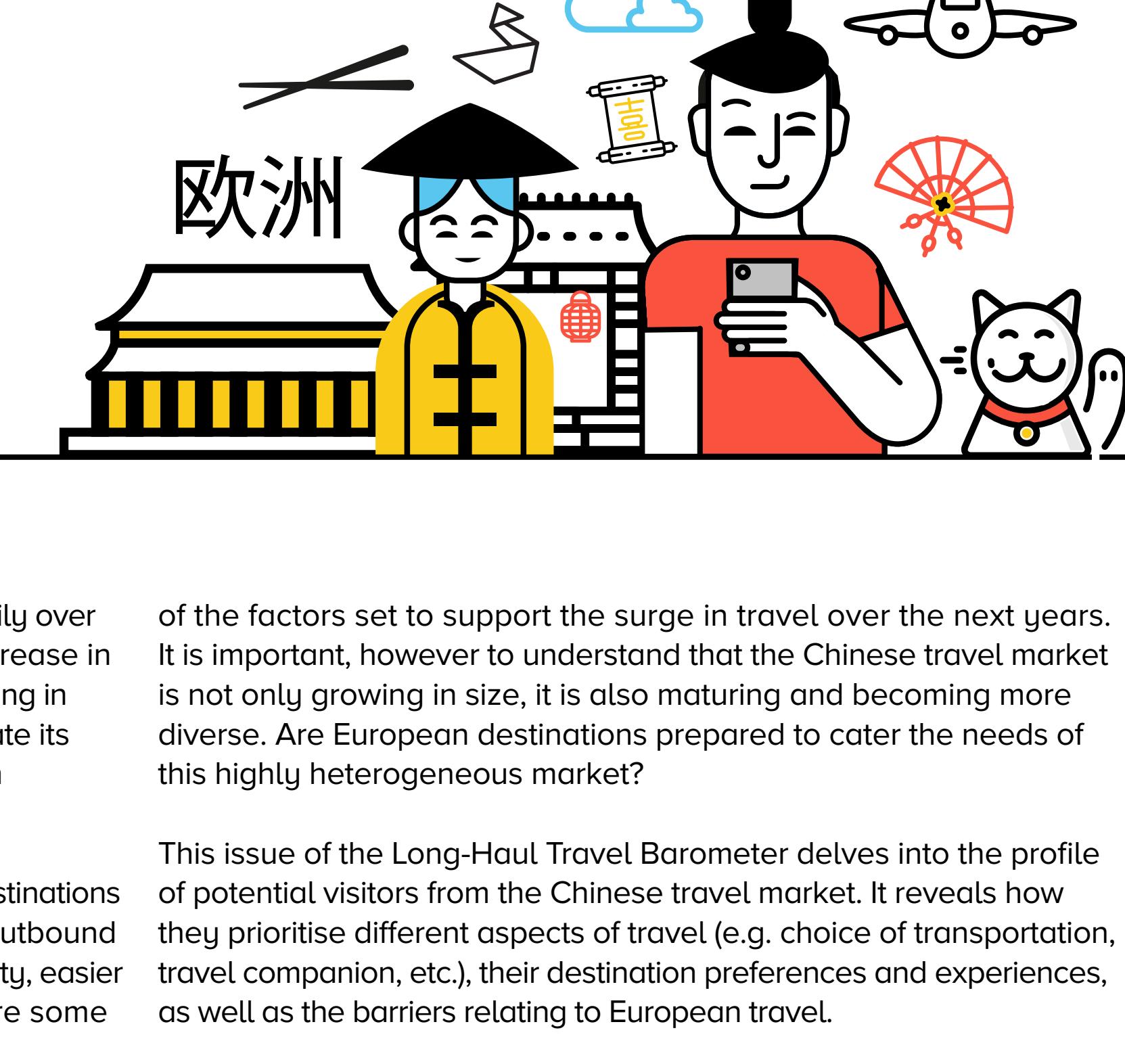


DESTINATION EUROPE

Long-Haul Travel Barometer



Edition 10, September 2017

The Chinese outbound travel market has been growing steadily over the past 15 years, with a stable rise since 2010.* With a 6% increase in the number of departures, and a 12% growth in travel spending in 2016 compared to the year prior, China continues to consolidate its position as the world's largest travel market in terms of both outbound travel and expenditure.**

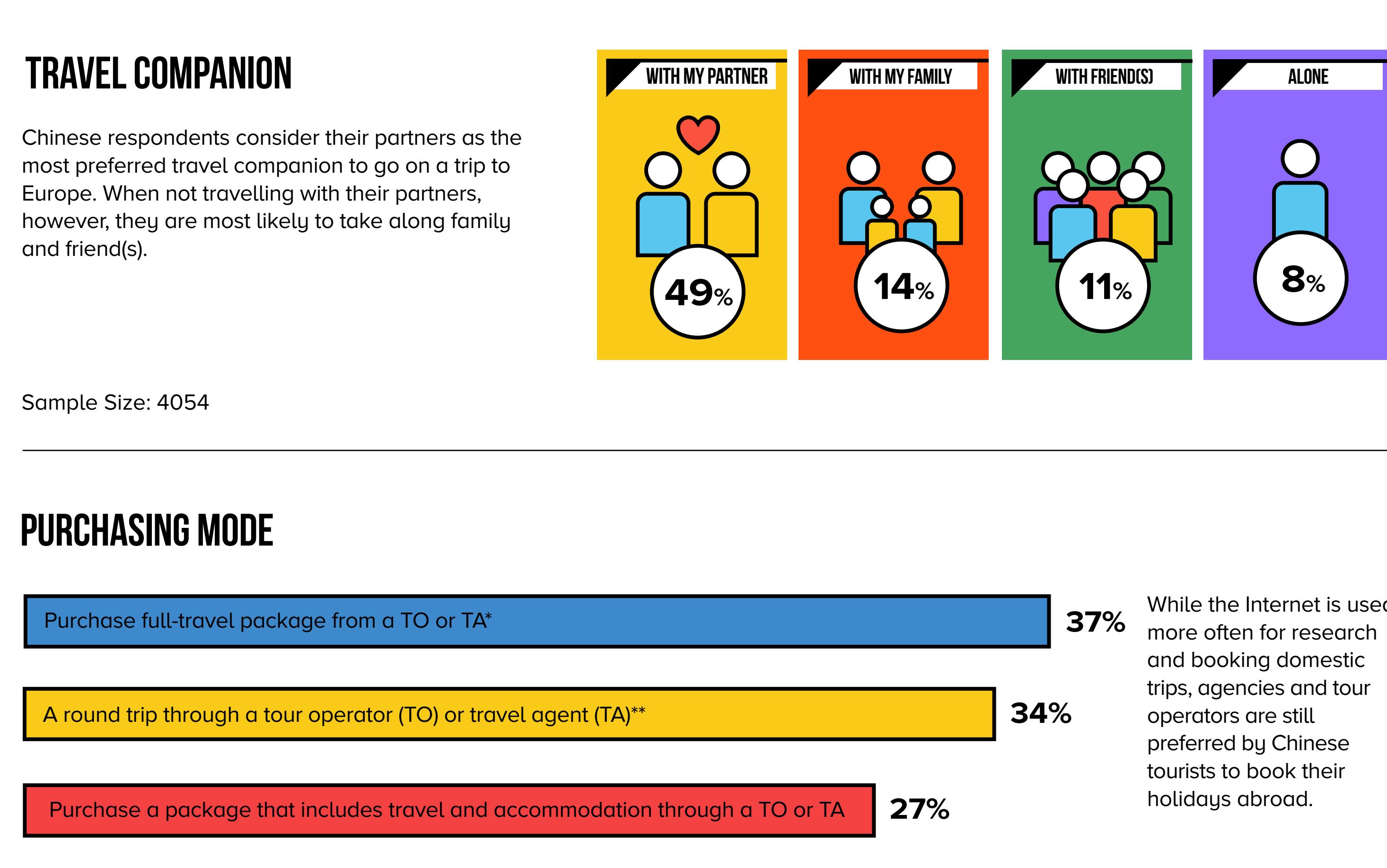
of the factors set to support the surge in travel over the next years. It is important, however, to understand that the Chinese travel market is not only growing in size, it is also maturing and becoming more diverse. Are European destinations prepared to cater the needs of this highly heterogeneous market?

China is rapidly becoming a key source of tourism for destination in Europe. The region currently attracts 12% of all Chinese outbound travel.*** The expanding middle class, improving air connectivity, easier visa procedures and more Chinese-friendly destinations are some

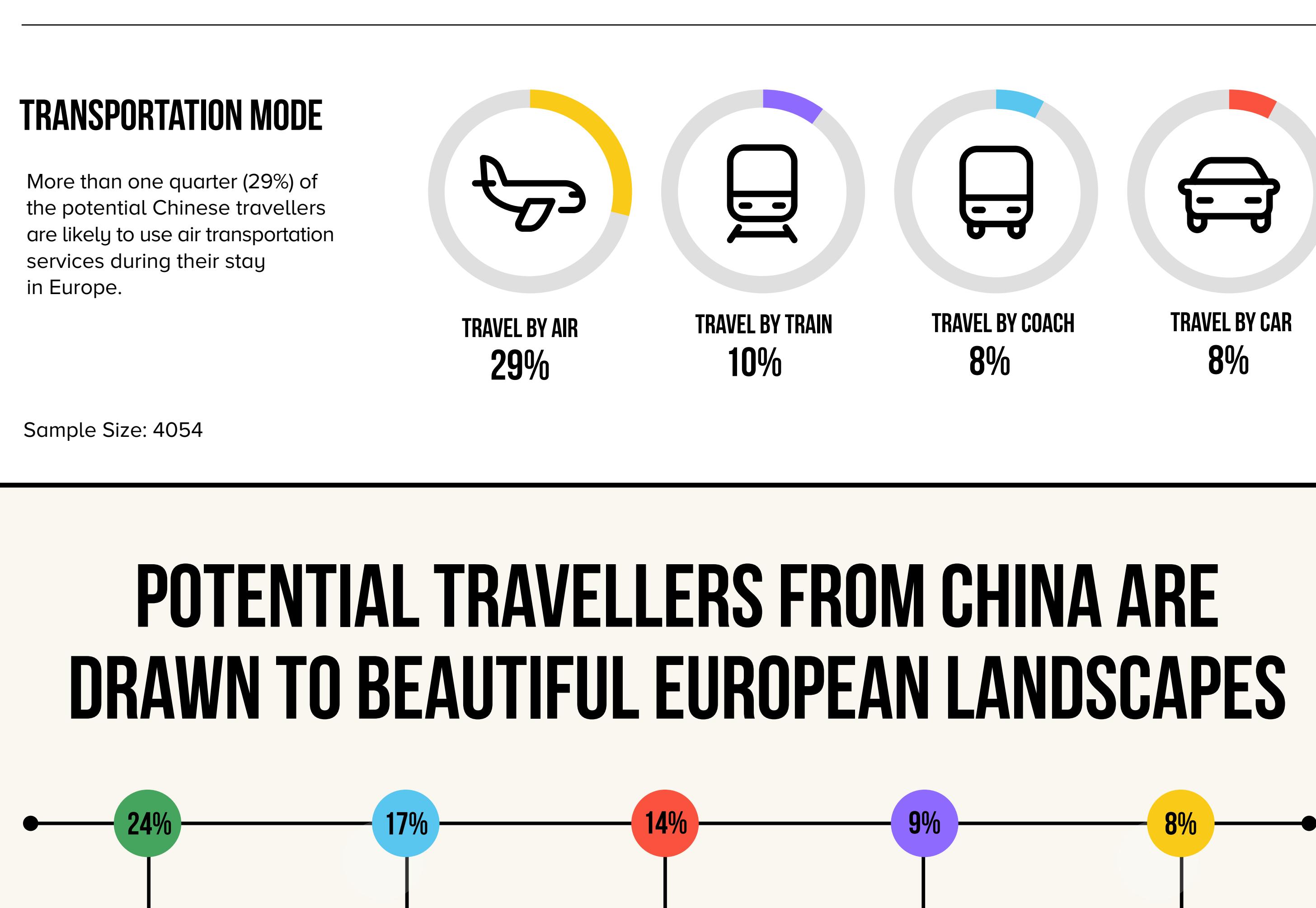
This issue of the Long-Haul Travel Barometer delves into the profile of potential visitors from the Chinese travel market. It reveals how they prioritise different aspects of travel (e.g. choice of transportation, travel companion, etc.), their destination preferences and experiences, as well as the barriers relating to European travel.

*ETC - Tourism flows from China to the European Union (2017) **UNWTO - Tourism Highlights 2017 ***ETC Dashboard - Tourism Economics (2017)

POPULAR EUROPEAN DESTINATIONS SPARK THE INTEREST OF POTENTIAL TRAVELLERS FROM CHINA



Sample Size: 4054

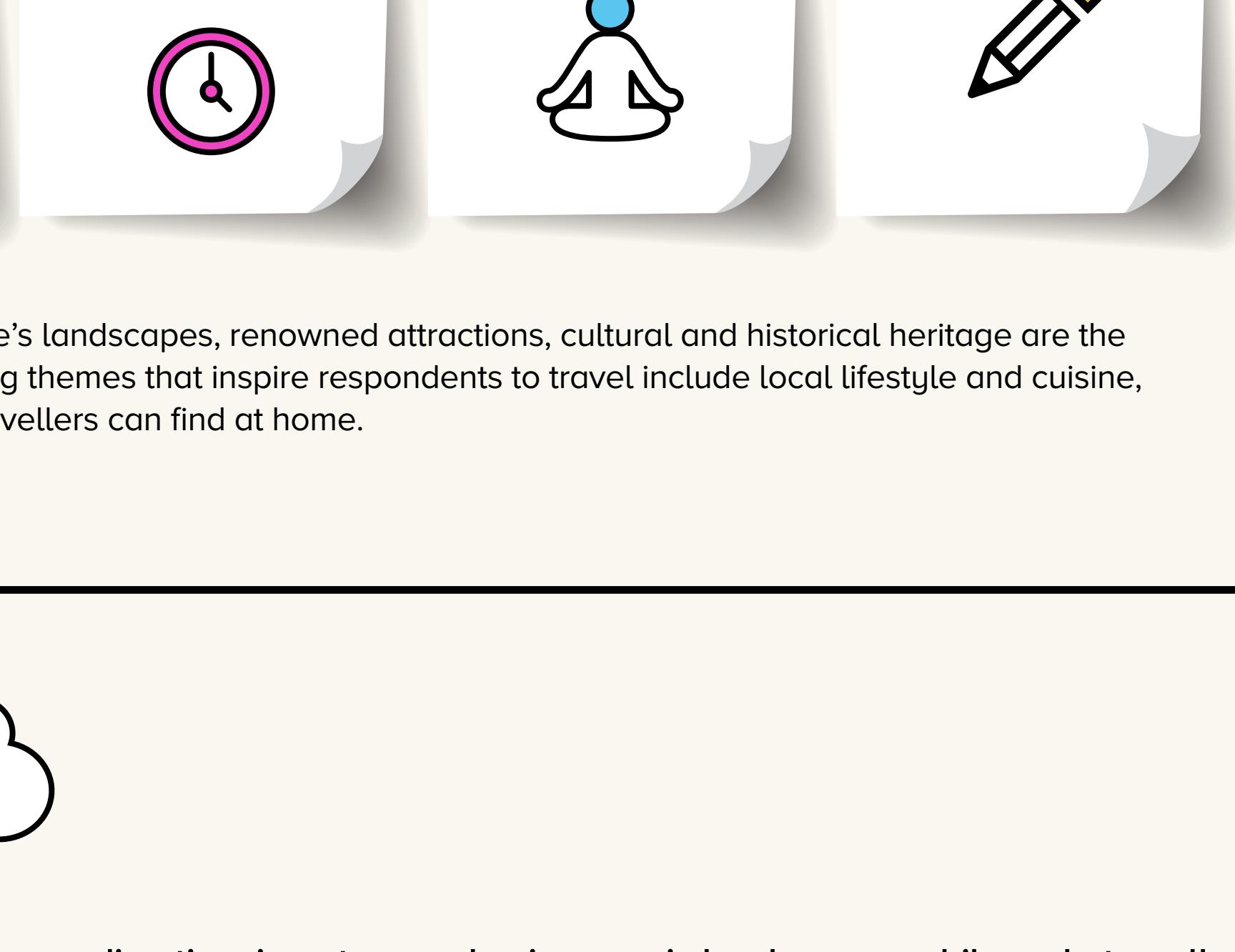


Sample Size: 18-34 (3239), 35-49 (2733), 50 years and older (2000)

TRAVEL PREFERENCES

TRAVEL COMPANION

Chinese respondents consider their partners as the most preferred travel companion to go on a trip to Europe. When not travelling with their partners, however, they are most likely to take along family and friend(s).



Sample Size: 4054

PURCHASING MODE



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

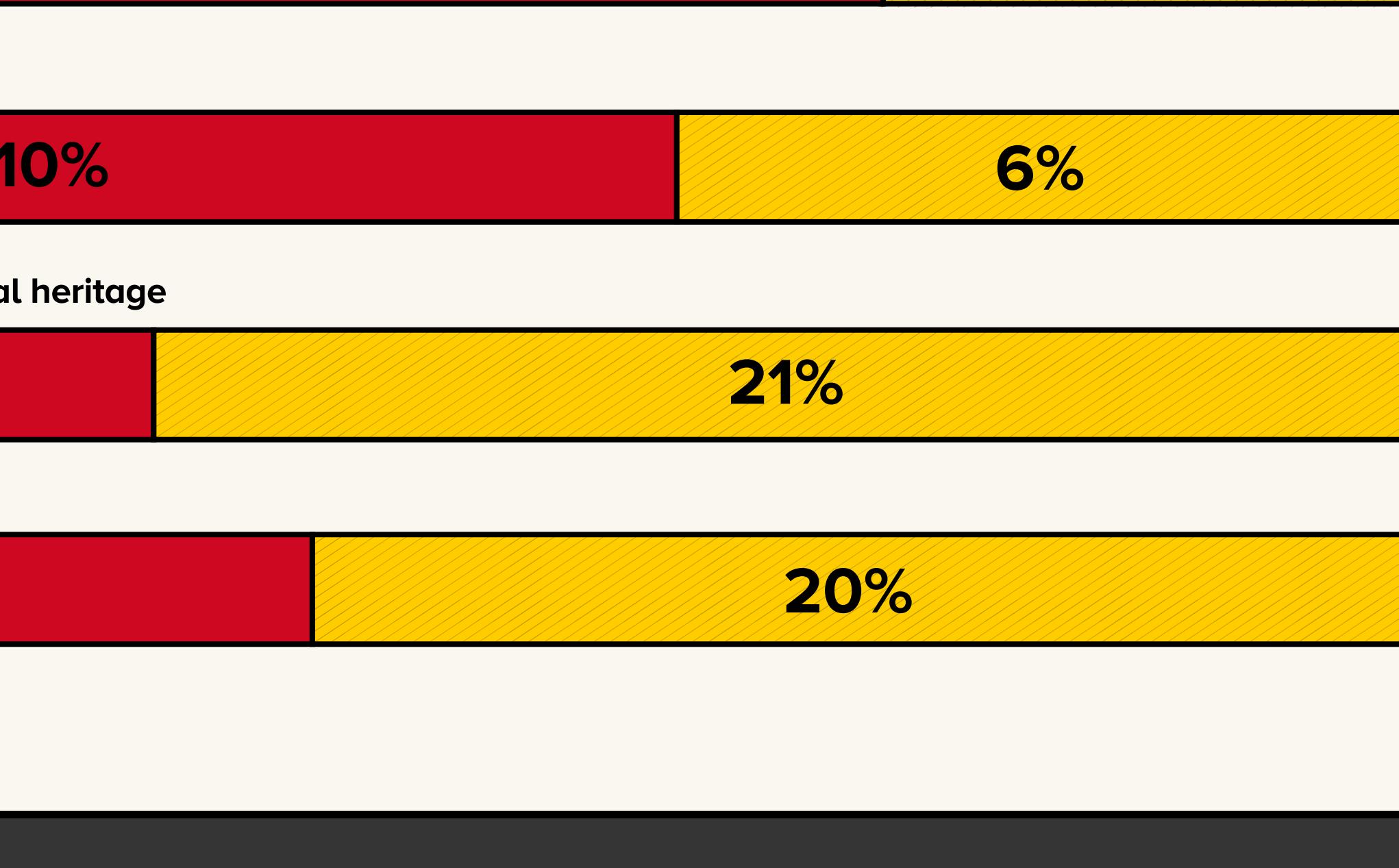
**Round trip refers to the transportation aspects of the holiday (e.g. flight tickets).

Sample Size: 4054

While the Internet is used more often for research and booking domestic trips, agencies and tour operators are still preferred by Chinese tourists to book their holidays abroad.

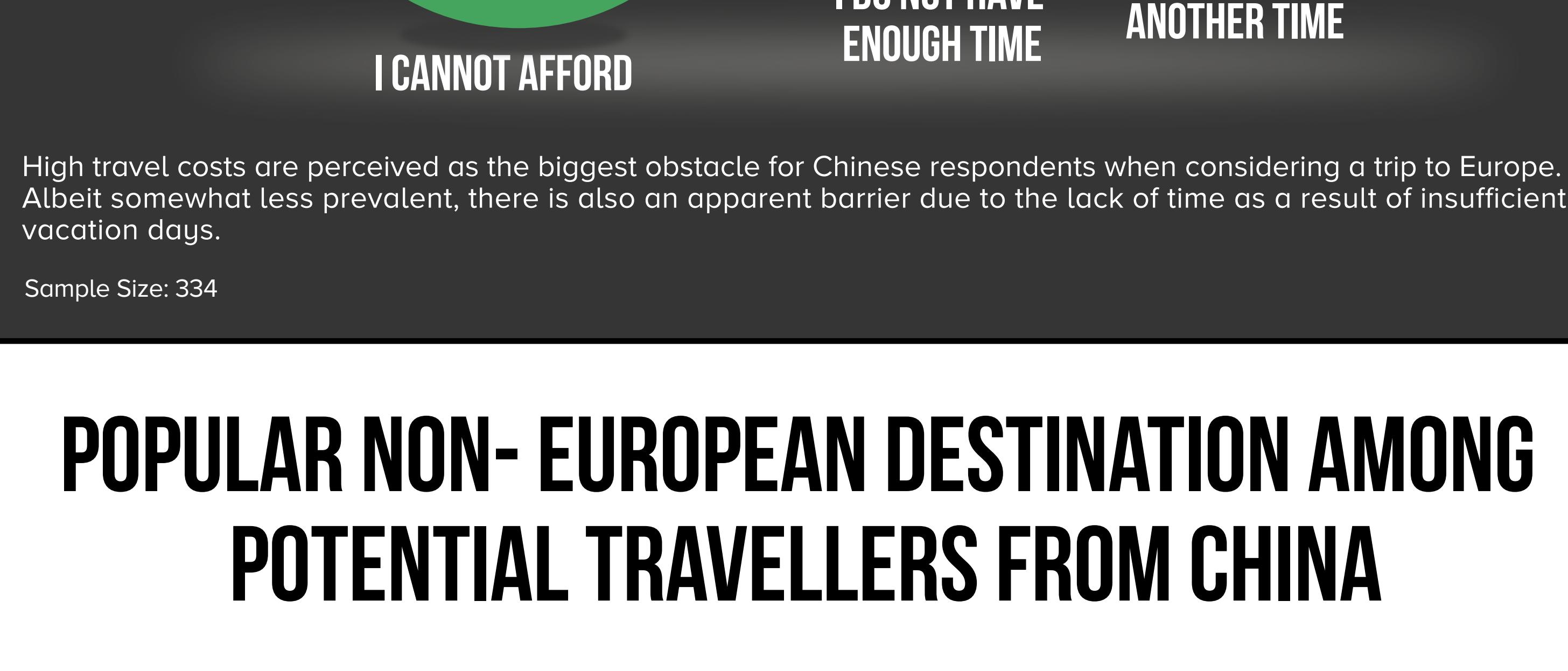
TRANSPORTATION MODE

More than one quarter (29%) of the potential Chinese travellers are likely to use air transportation services during their stay in Europe.



Sample Size: 4054

POTENTIAL TRAVELLERS FROM CHINA ARE DRAWN TO BEAUTIFUL EUROPEAN LANDSCAPES

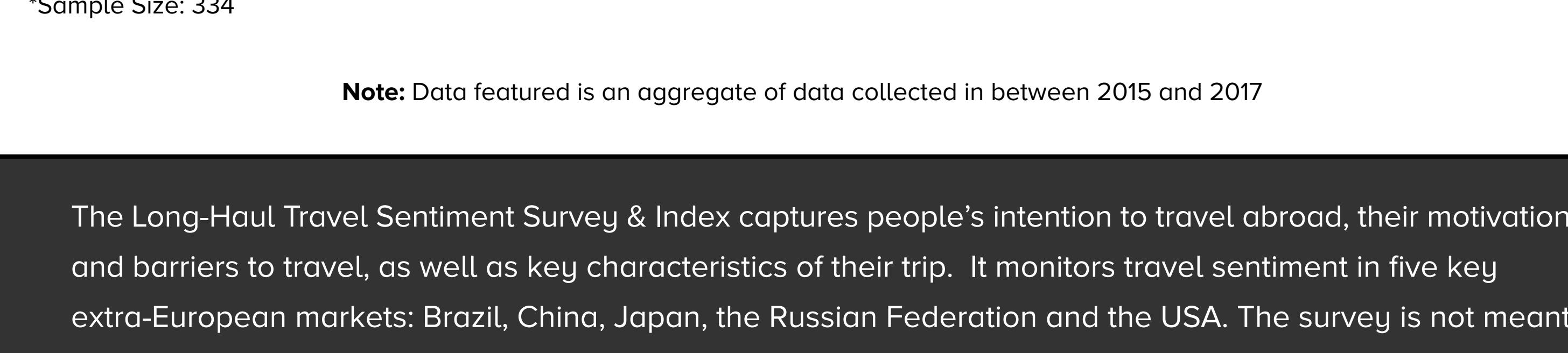


For all travellers who participated in the survey, Europe's landscapes, renowned attractions, cultural and historical heritage are the strongest motivators to visit the region. Other interesting themes that inspire respondents to travel include local lifestyle and cuisine, which are notably different than everything Chinese travellers can find at home.

Sample Size: 4054

DID YOU KNOW?

Female respondents are more enthusiastic about spending time in nature and enjoy scenic landscapes, while male travellers tend to value experiences with historical references, coupled with a desire to learn more about the culture of a destination.



Sample Size: 2497

INTERESTING FACTS

Across age groups, senior travellers (+50) are more interested in Europe's history, culture and beautiful landscapes whereas youngsters (18-35) seem to increasingly look for active experiences that also immerse them into the local lifestyle.

Sample Size: 2497

Note: Data featured is an aggregate of data collected in between 2015 and 2017

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

High travel costs are perceived as the biggest obstacle for Chinese respondents when considering a trip to Europe. albeit somewhat less prevalent, there is also an apparent barrier due to the lack of time as a result of insufficient vacation days.

Sample Size: 334

POPULAR NON-EUROPEAN DESTINATIONS AMONG POTENTIAL TRAVELLERS FROM CHINA

Oceania 36%

Australia 21%

South Asia 35%

New Zealand 17%

North America 21%

United States 14%

Canada 7%

Nepal 26%

Maldives 6%

India 26%

China 21%

Japan 17%

South Korea 10%

Russia 10%

Brazil 7%

Argentina 7%

Chile 5%

Peru 5%

Egypt 5%

UAE 5%

U.S.A. 5%

Other 5%

Other