

DESTINATION EUROPE

Long-Haul Travel Barometer

EDITION 13, JUNE 2018

The period between May-August has traditionally been a vital time in the calendar of European destinations that welcomes a large number of travellers. Summer is a popular time for vacations, especially in Europe where the warm weather allows visitors to enjoy a wide range of outdoor activities.

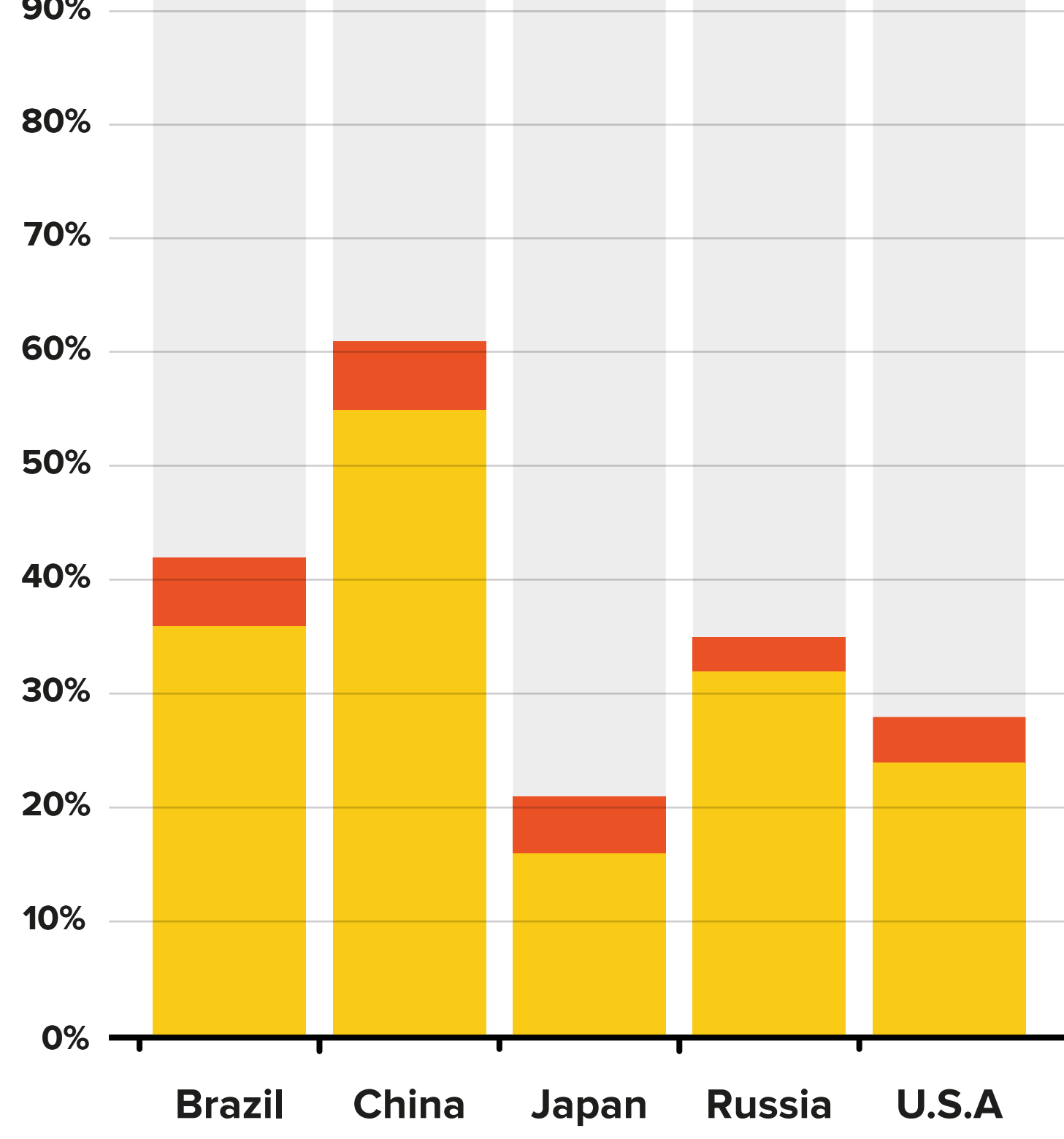
The research activity undertaken by the European Travel Commission, the Eurail Group and the European Tourism Association dives deep into the expectations of travellers from

Brazil, China, Japan, Russia and the US who intend to visit Europe during this period, what destinations they plan to visit and what kind of holiday experience they want to enjoy in Europe.

Results of the Long-Haul Travel Sentiment survey show that the majority of respondents who intend to travel to Europe this summer plan to visit multiple countries despite the limited time available (one to two weeks). France (35%), Italy (27%) and Germany (24%) remain on top of overseas travellers' wish list.

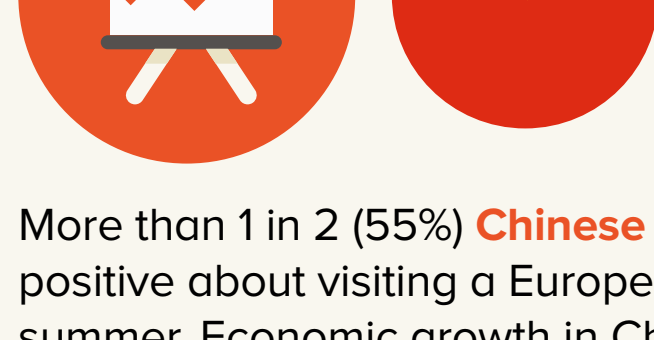
EUROPE REMAINS ON THE TOP OF RESPONDENTS' TRAVEL WISH LIST FOR SUMMER BUT THE OVERALL TREND IS MIXED

Intention to travel overseas between May-August 2018 (% of respondents)



*Other refers to the percentage of respondents who do not plan to travel outside their region of residence in the next four months

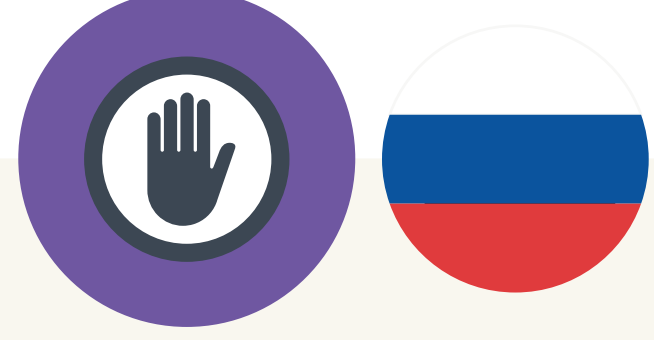
**Sample size N=1000 per market



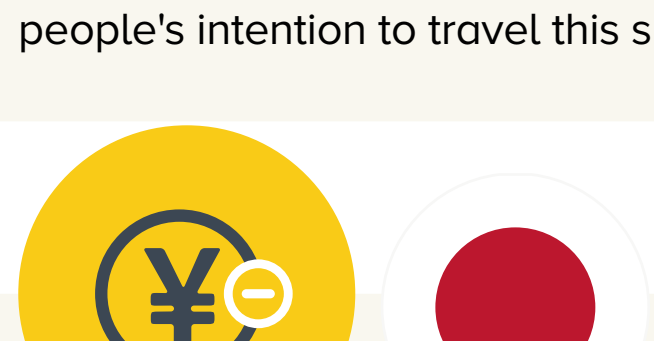
More than 1 in 2 (55%) Chinese respondents are positive about visiting a European destination this summer. Economic growth in China and competitive airfares continue to support international travel. However, European destinations should be alert as fast emerging destinations in Asia and the Pacific are gaining increased popularity.



Out of the 39% of US respondents that express interest in travelling overseas this summer, 34% have a European destination in mind. This slight increase over the same period last year, could be attributable to tax cuts and the upward movement of the US dollar, which increased the spending power of US citizens and could possibly boost the desire to travel.



68% of Russian respondents are not keen on travelling to Europe between May-August 2018. The imposition of new sanctions by the U.S. dipped Russia's currency and this seems to have impacted household spending and people's intention to travel this summer.



Compared to other surveyed markets, Japanese are most doubtful about long-haul trips to Europe this summer. The weak results could be partially attributed to the reported economic decline in Japan at the beginning of the year that resulted in a negative income growth and weakened consumer confidence.

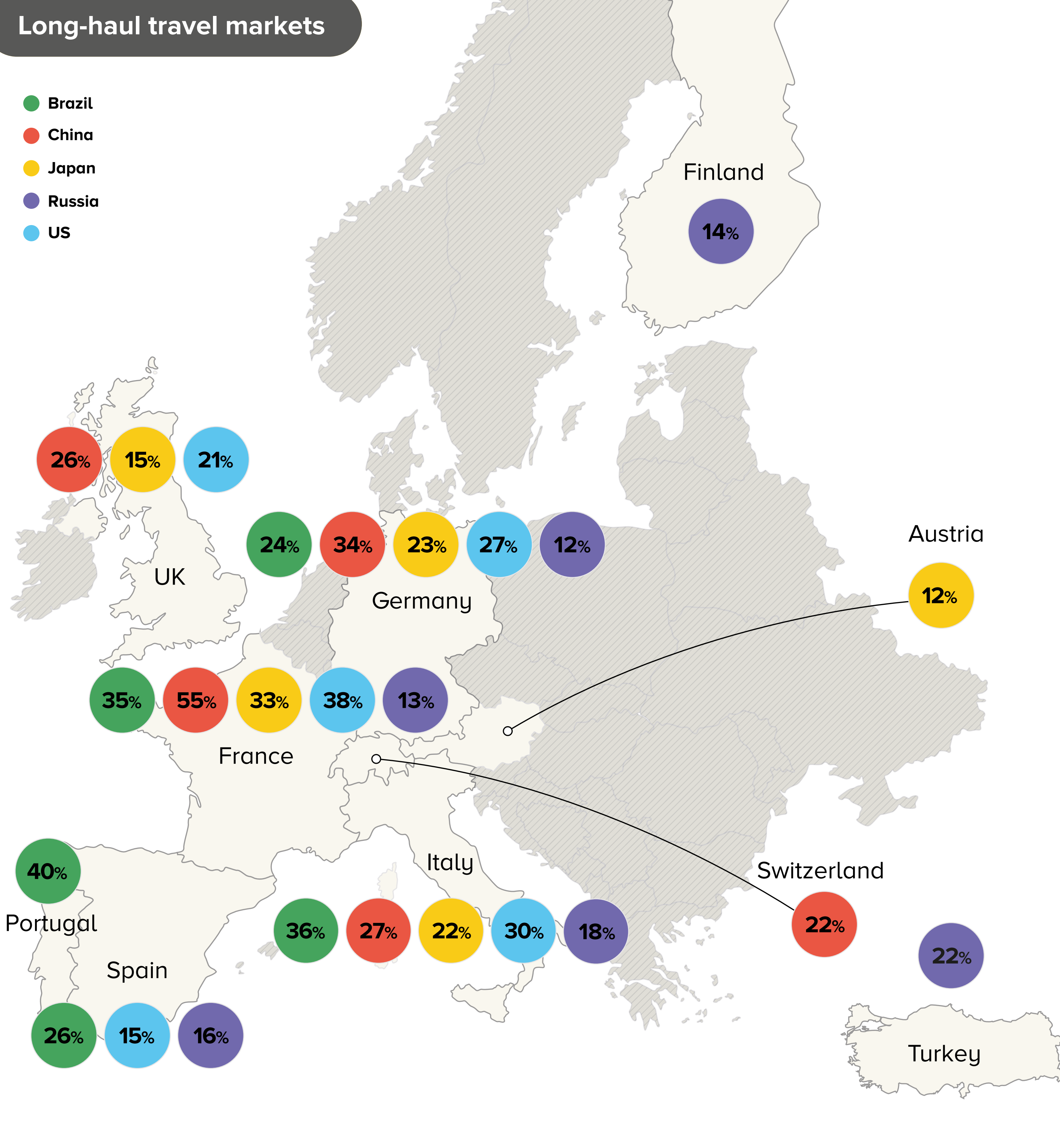


42% of Brazilian respondents are positive about visiting long-haul destinations between May-August 2018. This represents a slight year over year decrease, which possibly reflects citizens' negative assessment of the future economic situation in the country and their willingness to travel overseas.

TOP SPOTS FOR SUMMER VACATIONS IN 2018

Long-haul travel markets

- Brazil
- China
- Japan
- Russia
- US



Japanese and Chinese travellers are showing clear preferences towards well-known European destinations among which France is holding a leading position.

US respondents classify France (38%), Italy (30%), Germany (27%), UK (21%) and Spain (15%) as top destinations for summer holidays in 2018

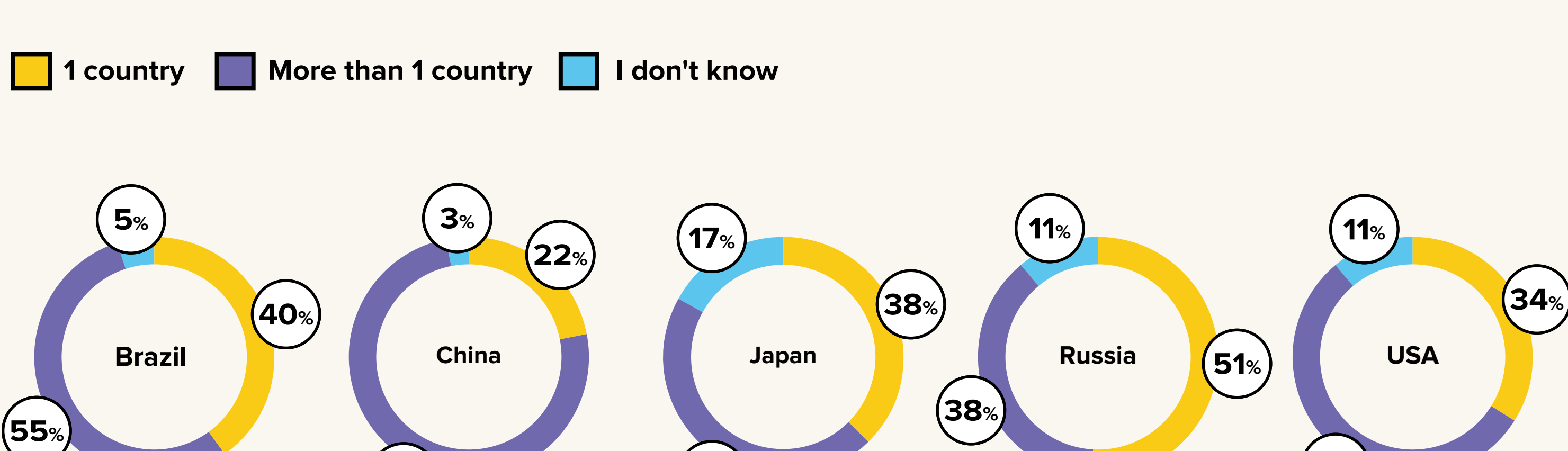
Turkey (15%) regained its position in Russian respondents' minds and ranked second as the most popular destination for European summer holidays after Italy (18%).

Brazilian respondents show high preferences for Southern European countries including Portugal (40%), Italy (36%), and Spain (26%).

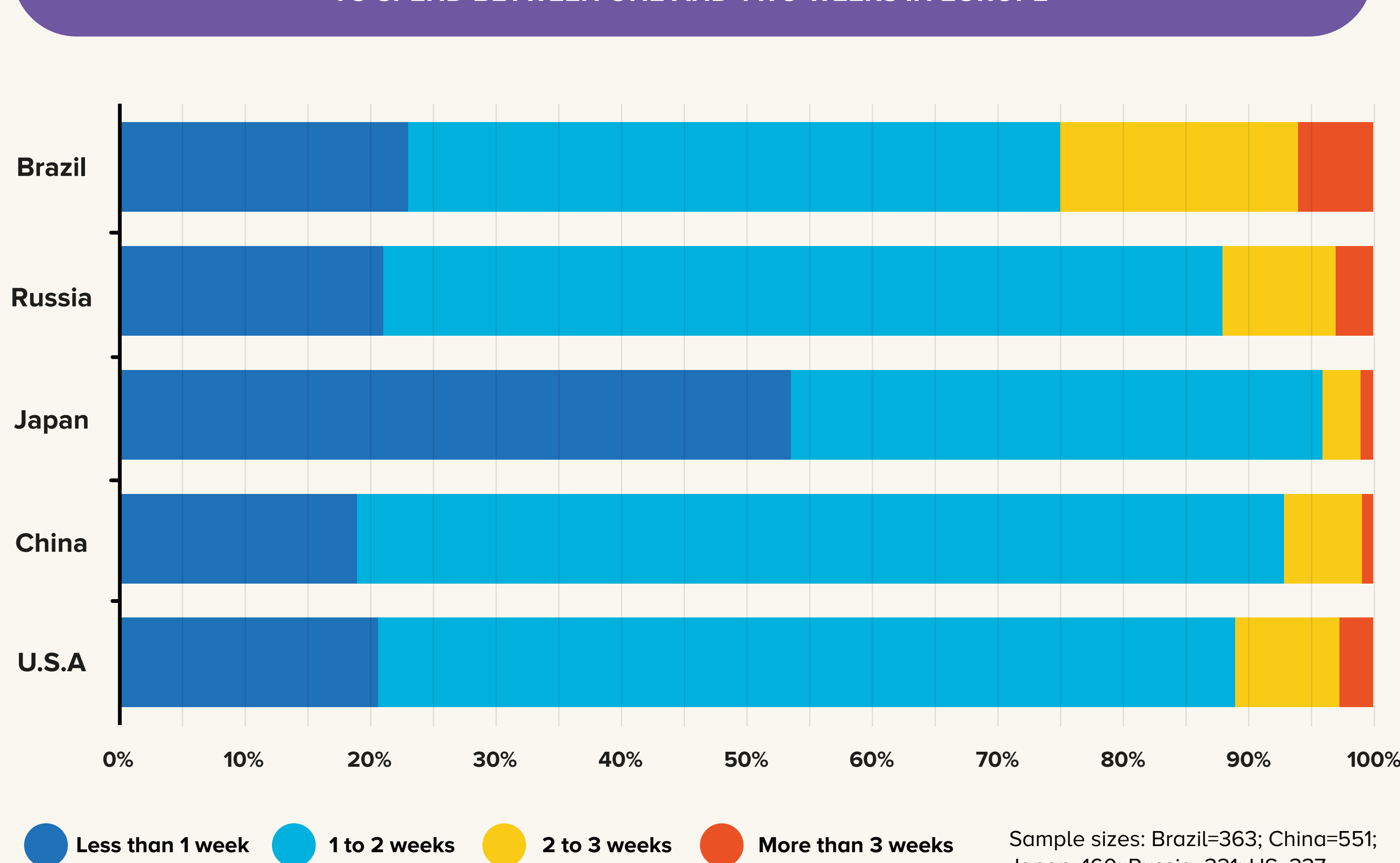
Percentages on the map represent the share of survey respondents interested in visiting the corresponding destinations. Sample sizes: Brazil=363; China=551; Japan=160; Russia=321; US=337

THE MAJORITY OF RESPONDENTS EXPRESS INTEREST IN MULTI-DESTINATION TRAVEL IN EUROPE THIS SUMMER

- 1 country
- More than 1 country
- I don't know

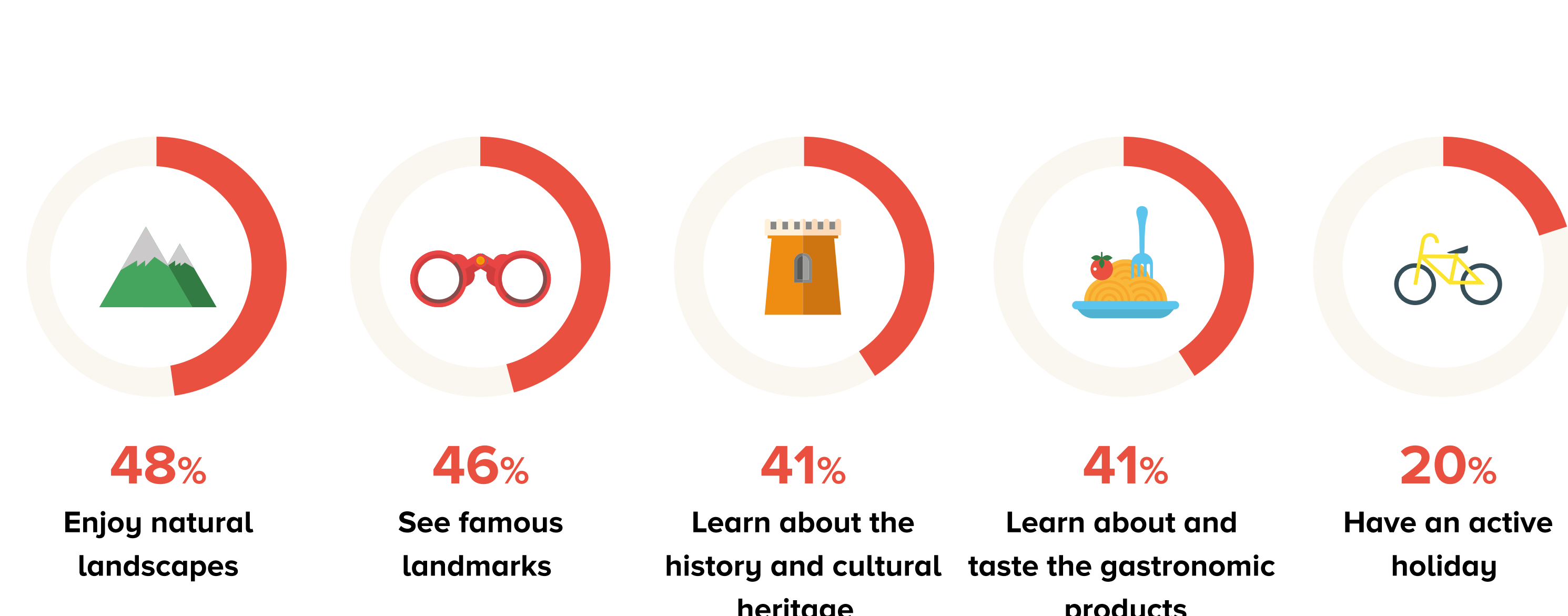


EXCEPT FOR JAPAN MOST RESPONDENTS ARE LIKELY TO SPEND BETWEEN ONE AND TWO WEEKS IN EUROPE



Sample sizes: Brazil=363; China=551; Japan=160; Russia=321; US=337

WHAT TRAVEL EXPERIENCES WILL OVERSEAS TRAVELLERS LOOK FOR DURING THEIR TRIP IN EUROPE THIS SUMMER?



SUMMER TRENDS 2018 VS 2017

Survey results indicate that respondents from Brazil, China, Russia and US show a significantly higher interest in trying certain activities than a year ago. These activities are explained in the following boxes.

Chinese are showing a considerably higher interest in Europe's gastronomy than a year ago.

US respondents seem to be increasingly looking for relaxing and recharging experiences in special surroundings such as spas and wellness facilities

Russians show year after year an increasing interest in visiting Europe's natural spots, learning about region's history and culture and stopping by the famous landmarks.

Brazilians are keener on learning about the cuisine and the gastronomic products offered in Europe than a year ago

Sample sizes: Brazil=363; China=551; Japan=160; Russia=321; US=337

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