

DESTINATION EUROPE

Long-Haul Travel Barometer

Edition 5/2016

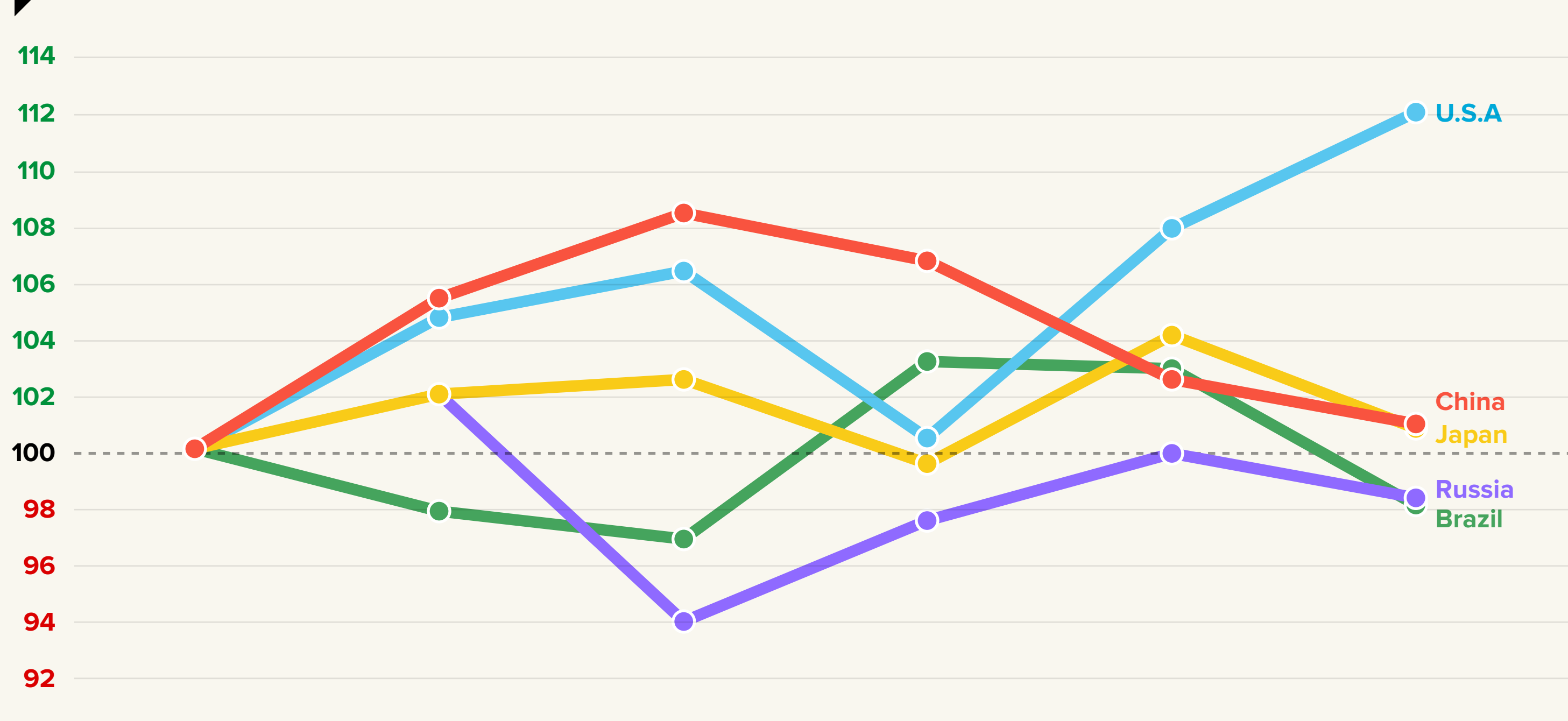
The Long-Haul Travel Barometer measures potential traveller sentiment for visiting Europe in the near future. By exploring respondents' travel preferences and motivations, it provides valuable insights into the long-haul travel trends from Europe's highest-volume outbound travel markets - the USA, China, Brazil, Japan and Russian Federation.

most positive sentiment, however, is seen among American respondents, whose enthusiasm for visiting Europe has increased throughout the year. For the autumn-winter season, potential long-haul travellers from this source market are expressing high interest in nature-related experiences, predominantly in the most popular European destinations such as France, Italy and Germany.

Survey data reveals that travel sentiment for the final four months of the year is positive in three out of the five markets surveyed. The

TRAVEL SENTIMENT REMAINS POSITIVE IN EUROPE'S LARGEST SOURCE MARKETS

Evolution of travel sentiment to Europe. Index (>100=expansion, <100=decline)*



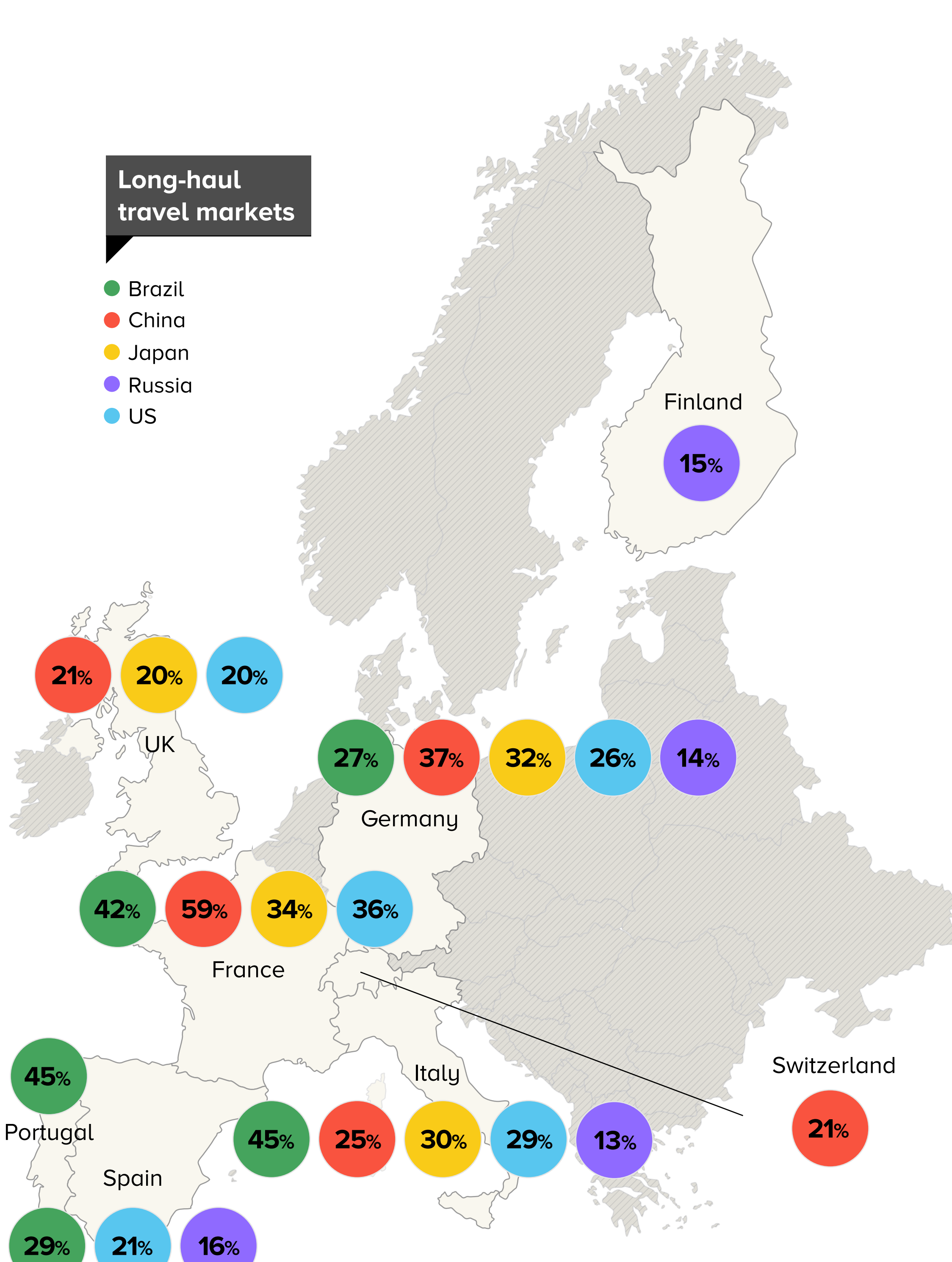
* Reference base period: January- April 2015

Despite volatile conditions in the five markets analysed, the sentiment in favour of travelling to Europe in the last quarter of the year remains positive in three out of five markets.

Americans' appetite for European destinations increases firmly towards the end of the year with **more than 1 in 3** respondents planning to visit the region in the coming months.

Chinese respondents remain positive about travelling to Europe despite the gradual decline in the sentiment registered since the beginning of the year. **Half** of those planning to travel outside China until the end of 2016 intend to visit a European destination.

EUROPE'S WELL-KNOWN DESTINATIONS CONTINUE TO FUEL THE INTEREST OF LONG-HAUL TRAVELLERS



More than 1 in 2 Chinese respondents intend to visit France in the coming months. Other appealing destinations for the autumn-winter months are Germany, Italy and the United Kingdom.

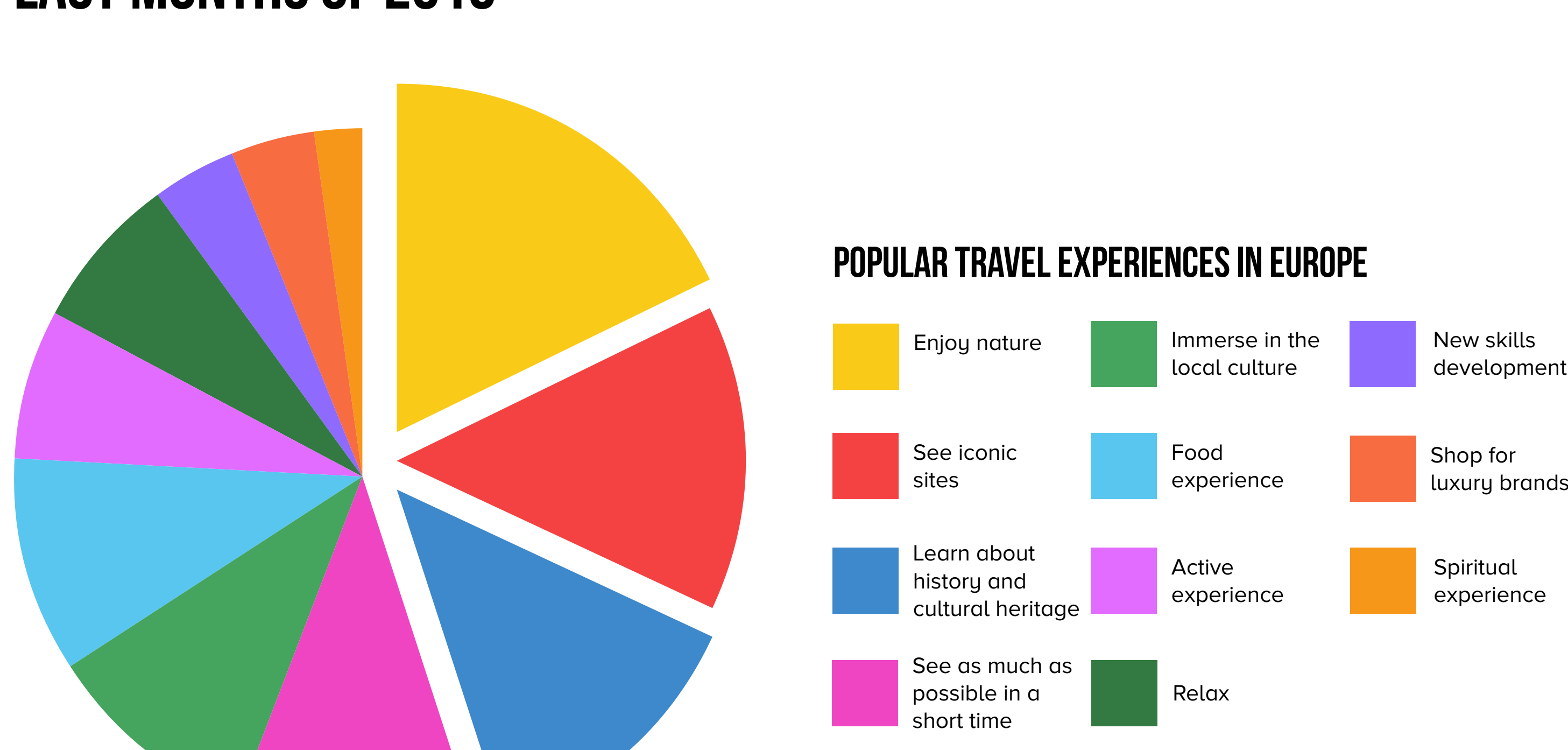
Italy, Portugal and France are potential destinations for the next European trip of the Brazilian respondents. These destinations are on the top of the travel wish-list with more than 2 in 5 respondents demonstrating interest in visiting them.

Japanese show clear preferences towards well-known European destinations including France and Germany.

Unlike other markets, the interest of the Russian respondents is spread across the whole region with leading destinations being Spain, Finland and Germany.

While most European destinations feature quite strongly in the visit preferences of American respondents, yet again it is France, Italy and Germany that are the first choices for US travellers.

BREATHTAKING NATURAL SCENERY AND EUROPE'S RENOWNED ATTRACTIONS ARE TOP REASONS FOR VISITING THE REGION IN THE LAST MONTHS OF 2016



JAPAN

21% and 20%

Japanese respondents show interest in Europe's breathtaking natural landscapes. 21% of them mentioned it as a primary trip motivation for the post-summer period. These travellers also place a particular emphasis on learning more about Europe's historical and cultural heritage.

CHINA

25% and 10%

In the last four months of the year, Chinese respondents are inspired by Europe's nature and its famous landmarks. Meanwhile, the region's culinary appeal is becoming a more important driver for Chinese visitors to Europe.

USA

15% and 10%

15% of US respondents planning to visit Europe in the coming months are enthusiastic about spending time in the region's natural landscapes. They also express quite a strong urge for activities associated with relaxation.

BRAZIL

16% and 12%

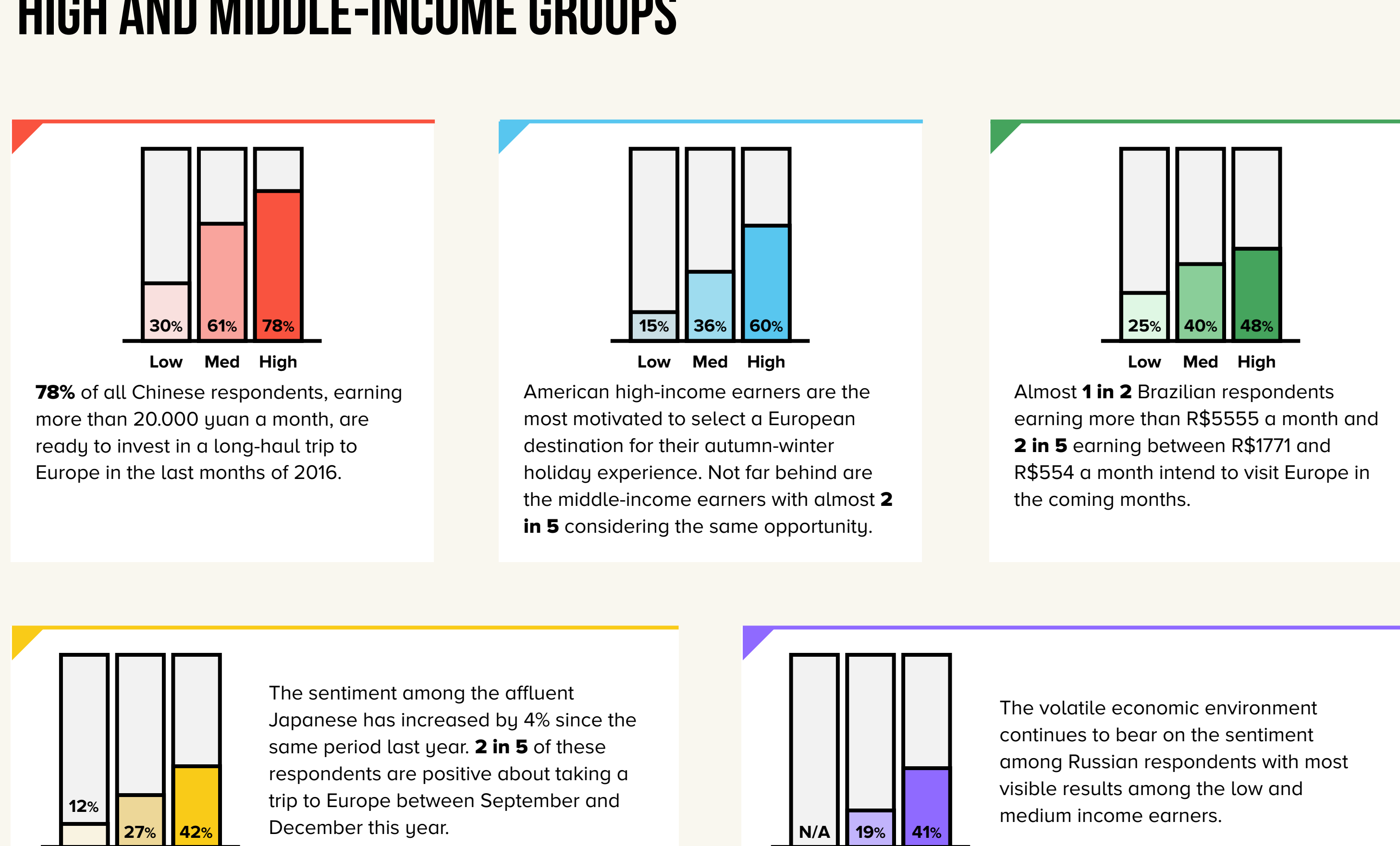
The diversity of cultures that Europe has to offer increases the interest of more Brazilian respondents throughout the year. 16% of them are willing to dive into the region's local lifestyle and traditions, while others will explore the culinary treasures during their next trip to Europe.

RUSSIA

18% and 18%

Russian respondents remain enthusiastic about seeing as much as possible in a single trip towards the end of the year. Their interest in Nature-related experiences is also gaining popularity in the post-summer period.

TRAVEL SENTIMENT TO EUROPE PREVAILS AMONG HIGH AND MIDDLE-INCOME GROUPS



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