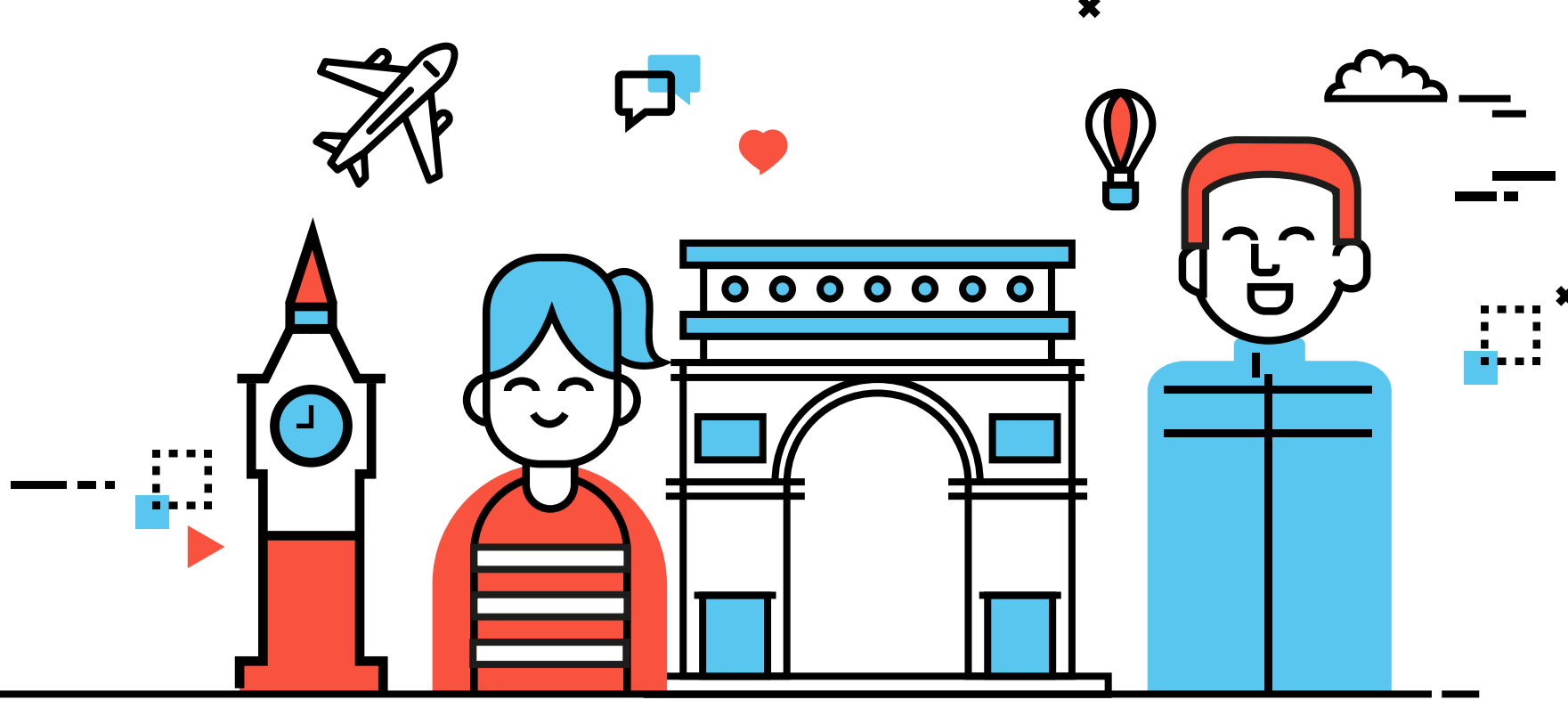


# DESTINATION EUROPE

Long-Haul Travel Barometer



Edition 7/2017

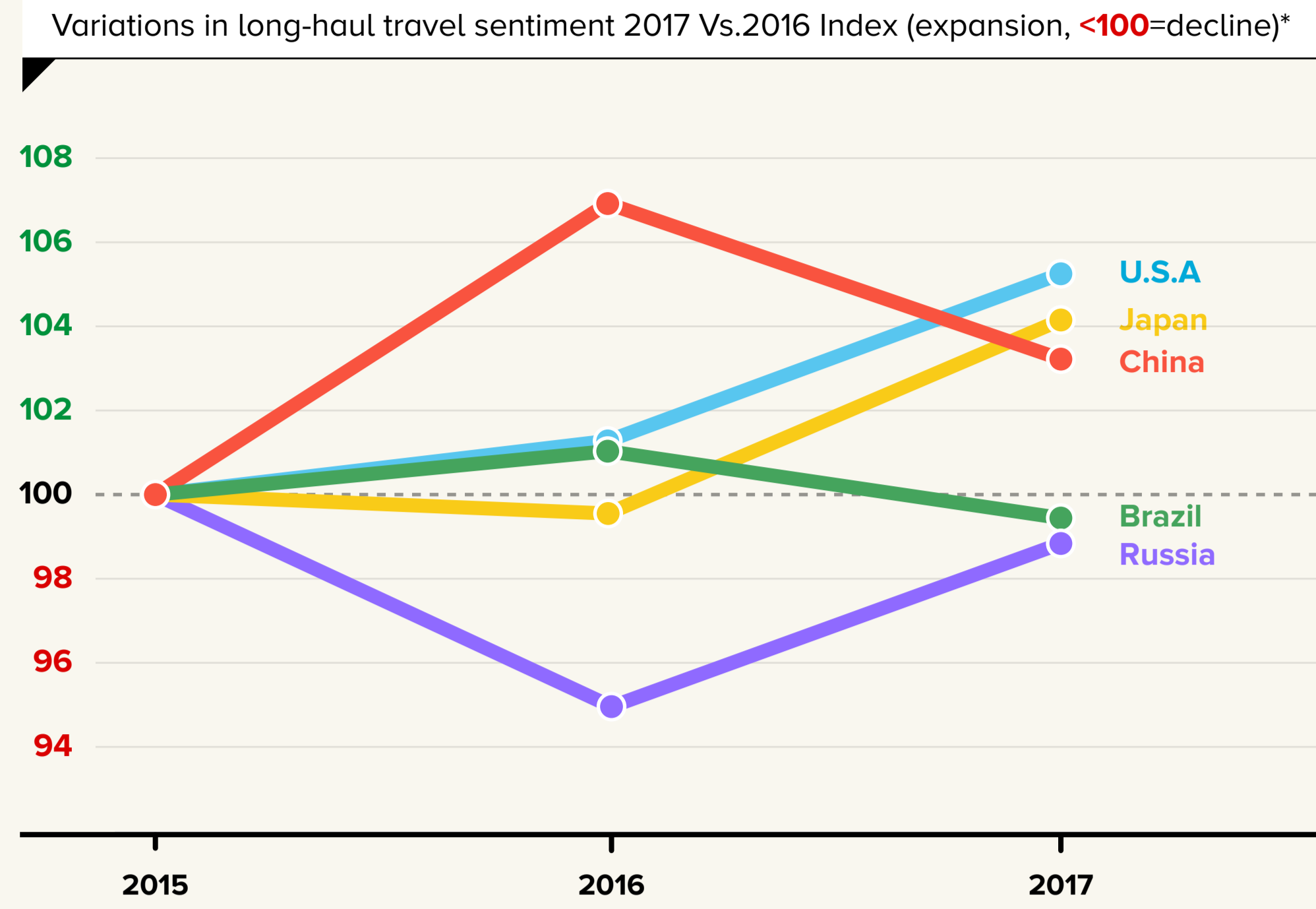
2016 was another year of growth in European tourism. The number of international tourist arrivals to European destinations between January and September grew by 2% on a year-on-year basis.\* Key overseas markets remain a key driver of arrivals growth with the US and China making the largest contributions to the number of international tourist arrivals. Will this trend continue in 2017? What do travellers think about their next holiday in Europe, and what are their intentions? The Long-haul Travel Barometer measures potential travellers' sentiment for visiting Europe in the near future and sheds light on their travel preferences and perceptions.

Prospects remain positive in the majority of the markets featured in the survey. American, Japanese and Chinese respondents are keener to travel to Europe in 2017 than a year ago. In Russia, there are some optimistic signs of revival, but in contrast, there is uncertainty among visitors from Brazil. Survey data reveals that well-known European destinations will continue to occupy a prominent position in respondents' minds during the Spring season 2017.

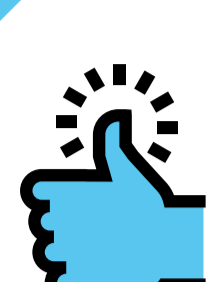
\*UNWTO, World Travel Barometer- Volume 15, January 2017

## APPETITE FOR EUROPEAN DESTINATIONS IS EXPECTED TO INCREASE THROUGH 2017

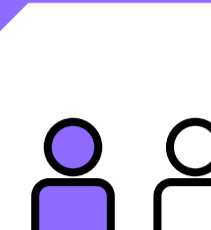
Variations in long-haul travel sentiment 2017 Vs.2016 Index (expansion, <100=decline)\*



\* Reference base period: 2015



Highest index values are shown among **American** respondents whose interest levels in visiting Europe are **6%** greater than in the same period in 2016

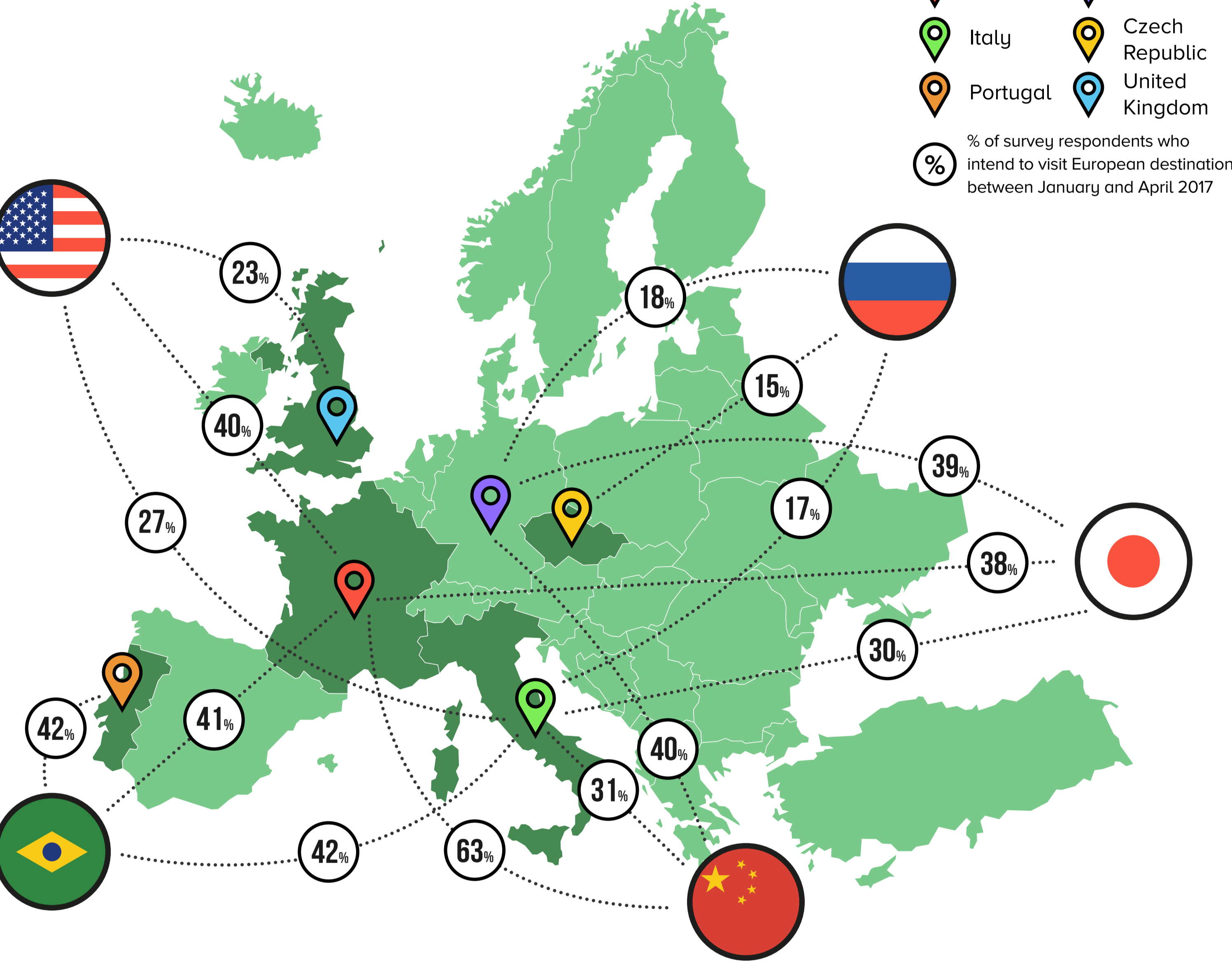


Russian sentiment shows signs of recovery. **2 in 1** respondents who are considering travelling overseas in 2017 have a European destination in mind



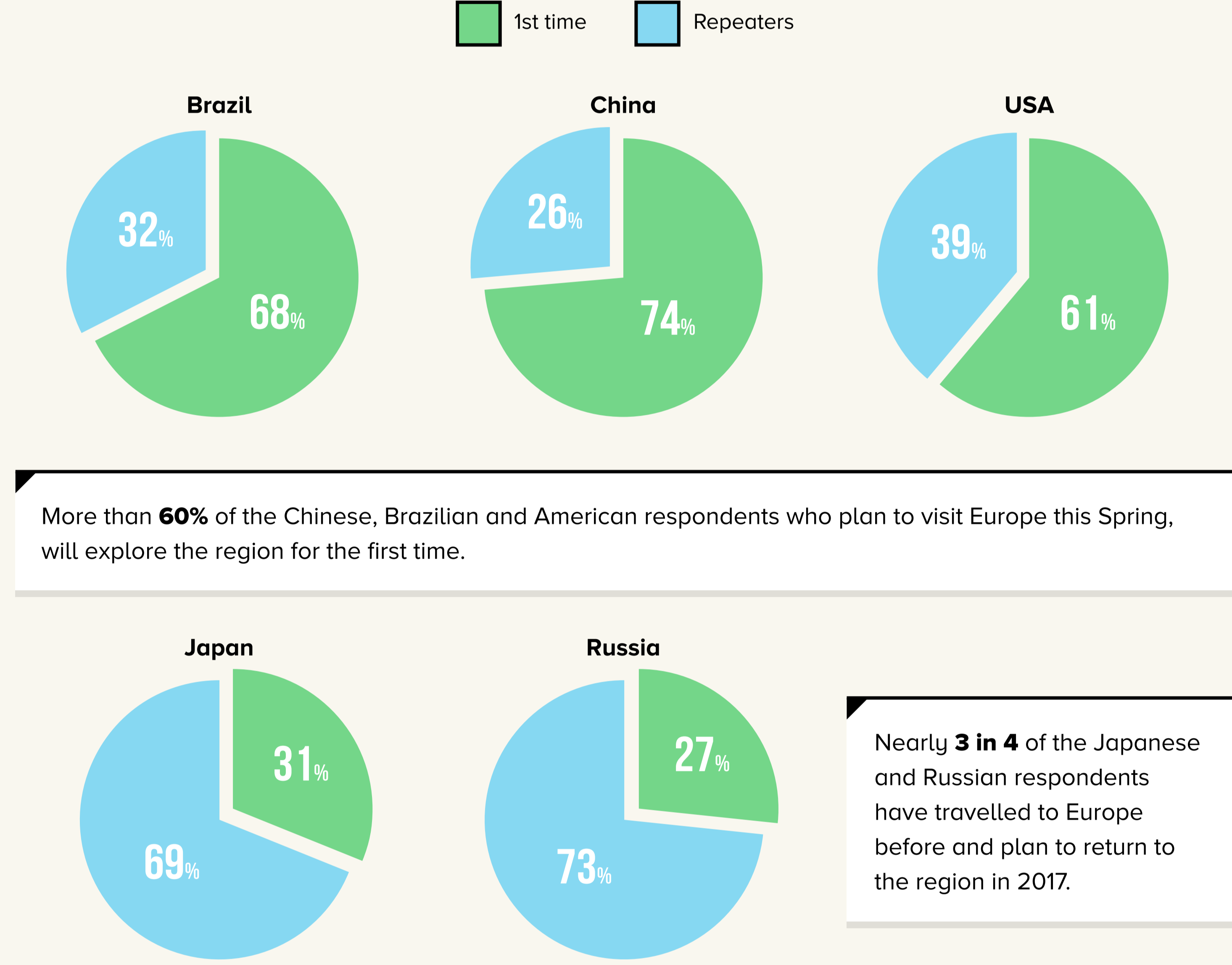
In **Japan**, the positive travel sentiment should be interpreted with care. Despite the upward trend, fewer than **25%** of the respondents plan to visit Europe in the next 12 months.

## EUROPE'S TOP DESTINATIONS WILL CONTINUE TO APPEAL TO POTENTIAL TRAVELLERS



For the coming Spring season, **France** is likely to enjoy a pent-up demand coming from the **Chinese (63%)**, **American (40%)** and **Japanese (39%)** markets if the safety situation continue to normalize.

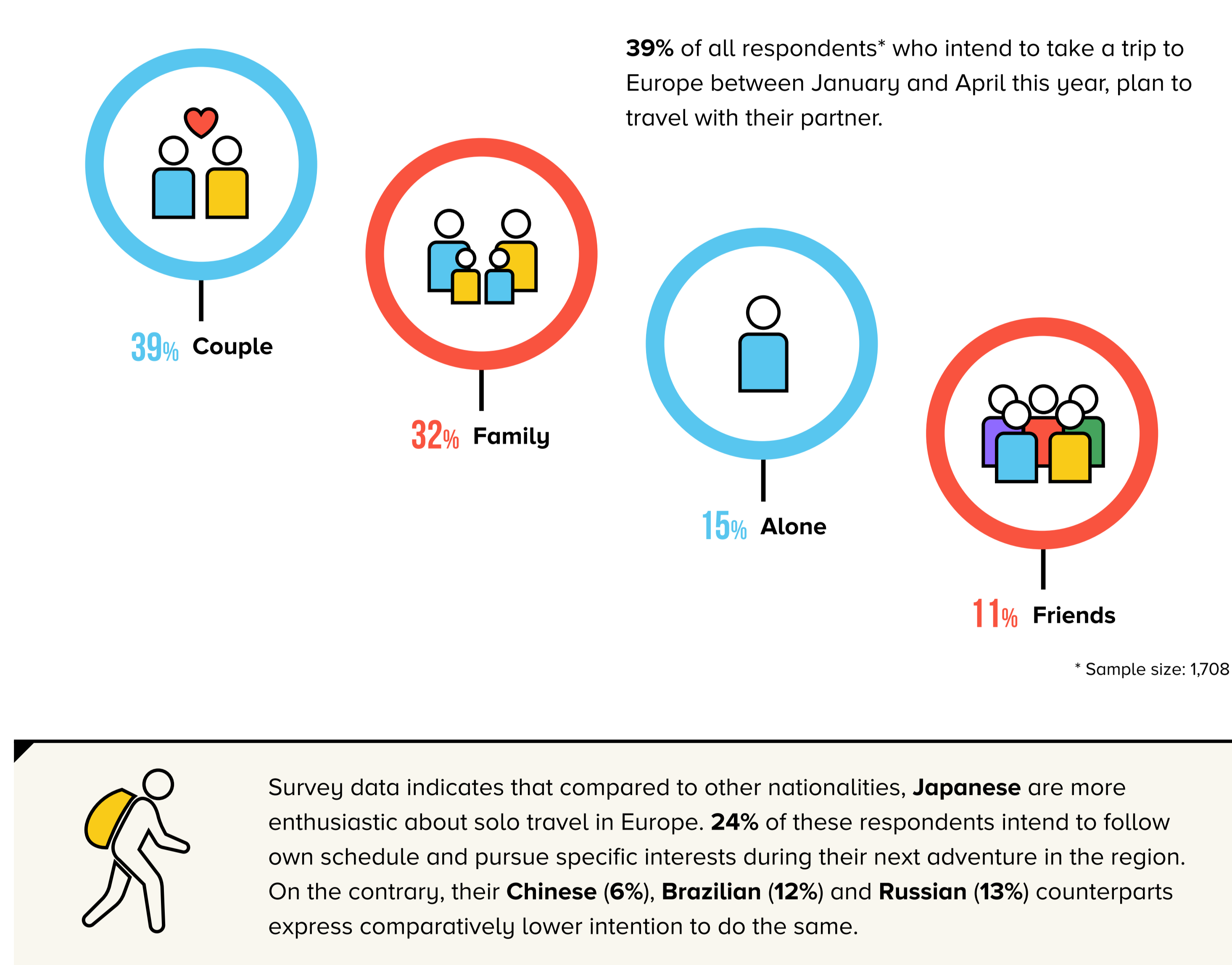
## EUROPE MAINTAINS ITS APPEAL IN DEVELOPED MARKETS, WITH HIGH LEVELS OF REPEAT VISITORS



More than **60%** of the Chinese, Brazilian and American respondents who plan to visit Europe this Spring, will explore the region for the first time.

Nearly **3 in 4** of the Japanese and Russian respondents have travelled to Europe before and plan to return to the region in 2017.

## AN OVERWHELMING MAJORITY OF RESPONDENTS PLAN TO TRAVEL ACCOMPANIED DURING THEIR NEXT TRIP TO EUROPE



Survey data indicates that compared to other nationalities, **Japanese** are more enthusiastic about solo travel in Europe. **24%** of these respondents intend to follow own schedule and pursue specific interests during their next adventure in the region. On the contrary, their **Chinese (6%)**, **Brazilian (12%)** and **Russian (13%)** counterparts express comparatively lower intention to do the same.

## STRONG COMPETITION COMING FROM REGIONS NEIGHBOURING EUROPE'S LARGEST SOURCE MARKETS



\* No data is available for Russia

Note: Data featured is an aggregate of data collected in 2015 and 2016

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](http://www.etc-corporate.org)



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