

DESTINATION EUROPE

LONG-HAUL TRAVEL BAROMETER

June 2019

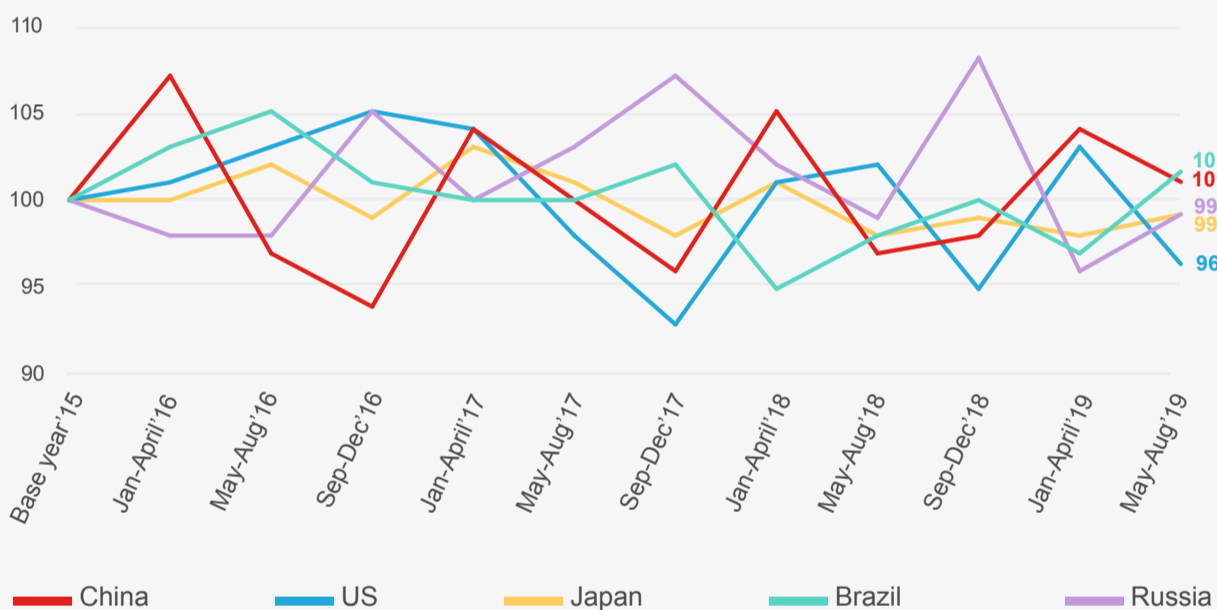
The Long-Haul Travel Barometer monitors the travel sentiment among potential travellers from Brazil, China, Japan, Russia and the United States (US). Results shed light on preferences, motivations and barriers related to travel to Europe. Findings are based on 1,000 interviews conducted in each market every four months.

The words 'respondents', 'travellers' and 'tourists' are generally used interchangeably; when they have been used, for no other reason than to add variety to the language



CHINESE AND BRAZILIANS SHOW THE STRONGEST INTENTION TO VISIT EUROPE THIS SUMMER

Evolution of long-haul travel sentiment. Index base= 100 (>100=expansion, <100=decline) *



*Index values for each wave are calculated based on corresponding waves in previous years.

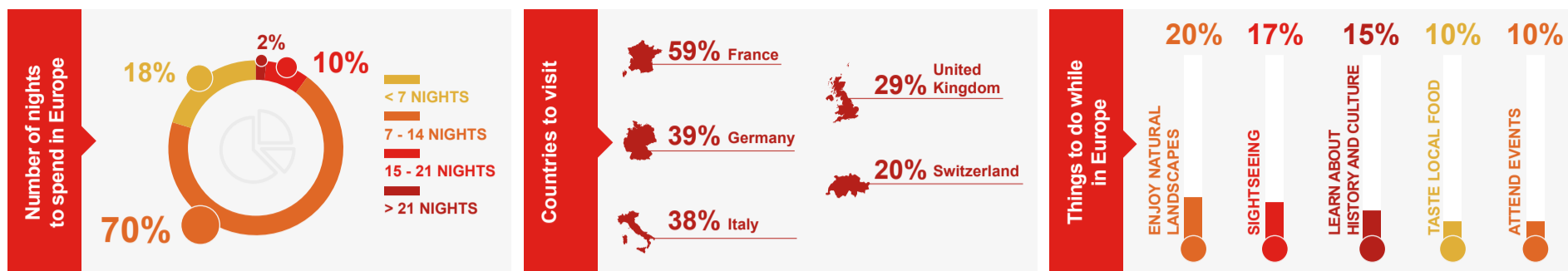


The positive travel sentiment in China reflects the success of the 2018 EU-China Tourism Year, the increasing affluence of citizens, improved air connectivity and visa relaxation policies introduced in some European countries. In Brazil, the optimism brought by government change and monetary policy capping interest rates bodes well for people's travel sentiment, yet it might not translate into actual behaviour as economic trends remain negative.

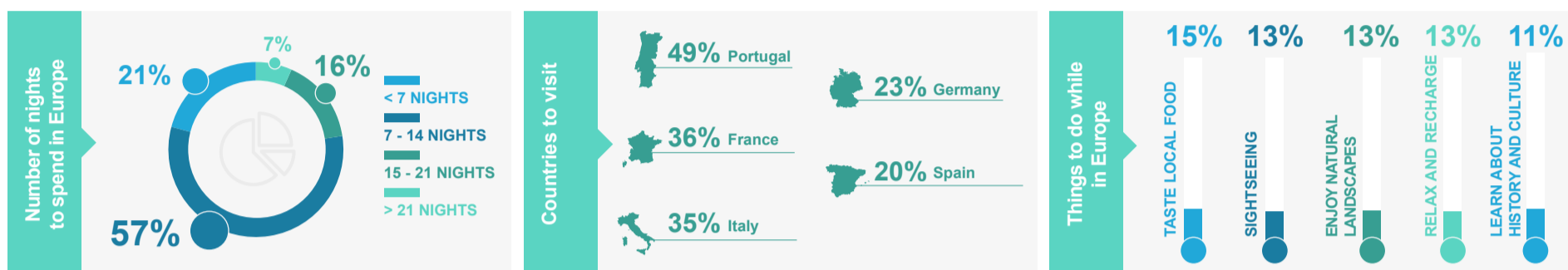


Index values in Japan, Russia and the US remain under base year values (100), suggesting that the summer months of 2019 will see no significant growth in travel volumes from these markets compared to 2018. The global economic slowdown and political uncertainties seem to negatively impact consumers' confidence in these markets and put pressure on people's travel plans.

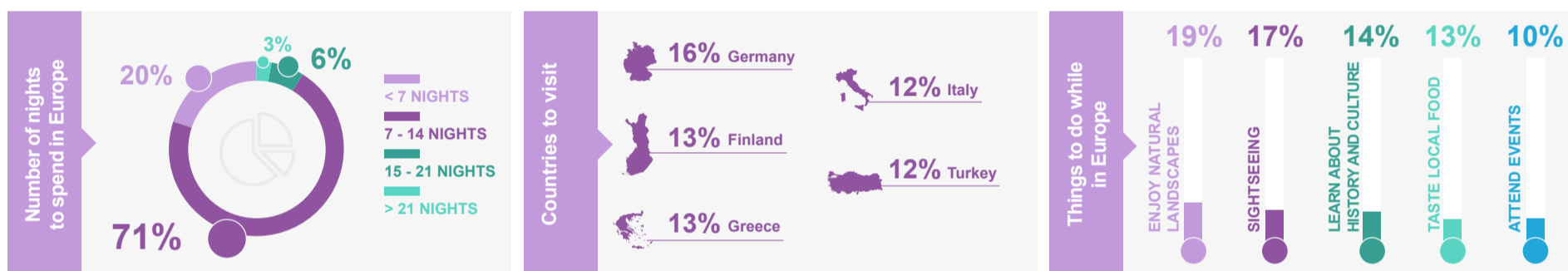
CHINESE TRAVELLERS ARE LIKELY TO STAY IN EUROPE BETWEEN 7 AND 14 NIGHTS AND COMBINE AN AVERAGE OF FOUR DESTINATIONS DURING THIS TIME. FRANCE, GERMANY AND ITALY TOP THE LIST OF EUROPEAN DESTINATIONS.



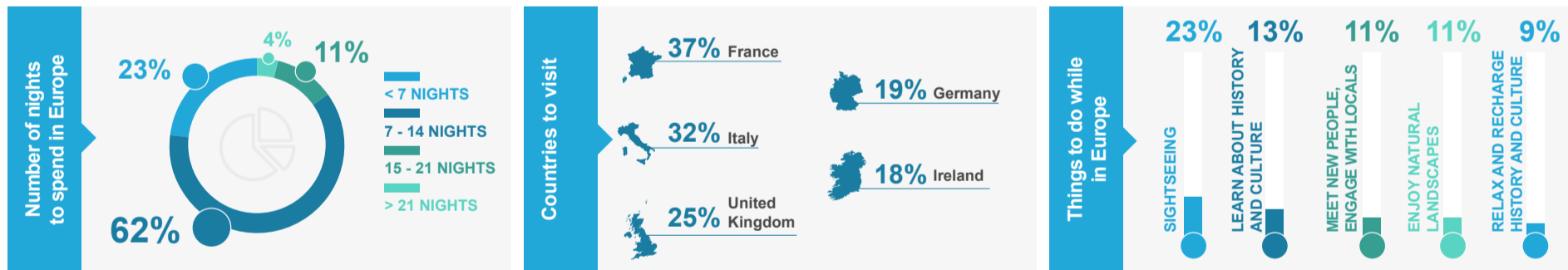
THE ATTRACTION OF LOCAL FOOD, SIGHTSEEING AND THE NATURAL LANDSCAPES IN EUROPE ARE AMONG THE MAIN FACTORS APPEALING TO BRAZILIAN VISITORS THIS SUMMER, WITH PORTUGAL, FRANCE AND ITALY BEING THE TOP THREE DESTINATIONS IDENTIFIED.



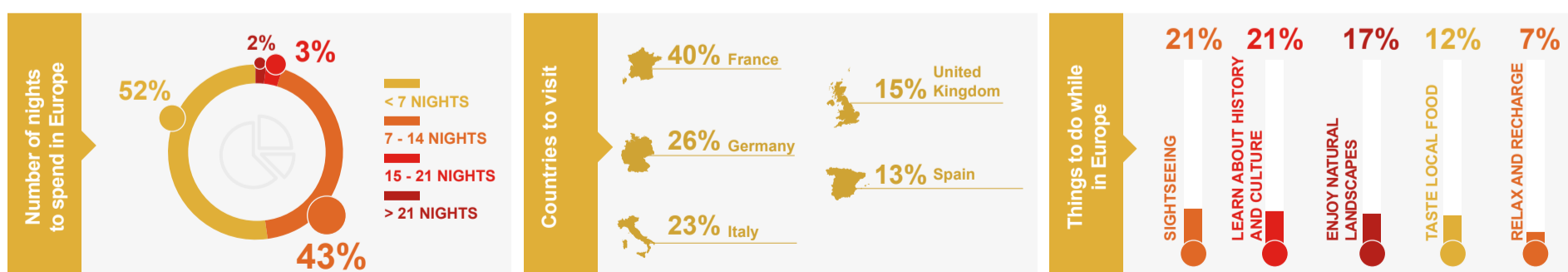
RUSSIAN TRAVELLERS ARE MOST LIKELY TO GO FOR SUMMER TRIPS THAT LAST NO LONGER THAN 2 WEEKS. SPENDING TIME IN NATURE AND VISITING RENOWNED PLACES FEATURE AMONG THE MOST POPULAR ACTIVITIES ON THE RUSSIANS' TO DO LIST.



FRANCE, ITALY AND THE UK TOP THE POTENTIAL US TRAVELLERS' LIST OF EUROPEAN DESTINATIONS WHILE IRELAND (5TH POSITION) AND THE NETHERLANDS (7TH POSITION) HAVE SIGNIFICANTLY GROWN IN POPULARITY OVER THE PAST 12 MONTHS. SIGHTSEEING SEEMS TO BE THE MOST POPULAR EXPERIENCE FOR THIS SUMMER.



OF ALL THE SURVEY PARTICIPANTS, JAPANESE ARE LIKELY TO STAY IN EUROPE FOR THE SHORTEST PERIOD, WITH 52% OF RESPONDENTS PLANNING TRIPS OF LESS THAN 7 DAYS. THE EUROPEAN HISTORY AND CULTURE REMAIN A HUGE DRAW FOR TRAVELLERS FROM THIS MARKET.



The Long-Haul Travel Sentiment Survey & Index captures people's intention to travel abroad, their motivations barriers to travel, as well as key characteristics of their trip. It monitors travel sentiment in five key and 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



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