

DESTINATION EUROPE

LONG-HAUL TRAVEL BAROMETER FEBRUARY 2020

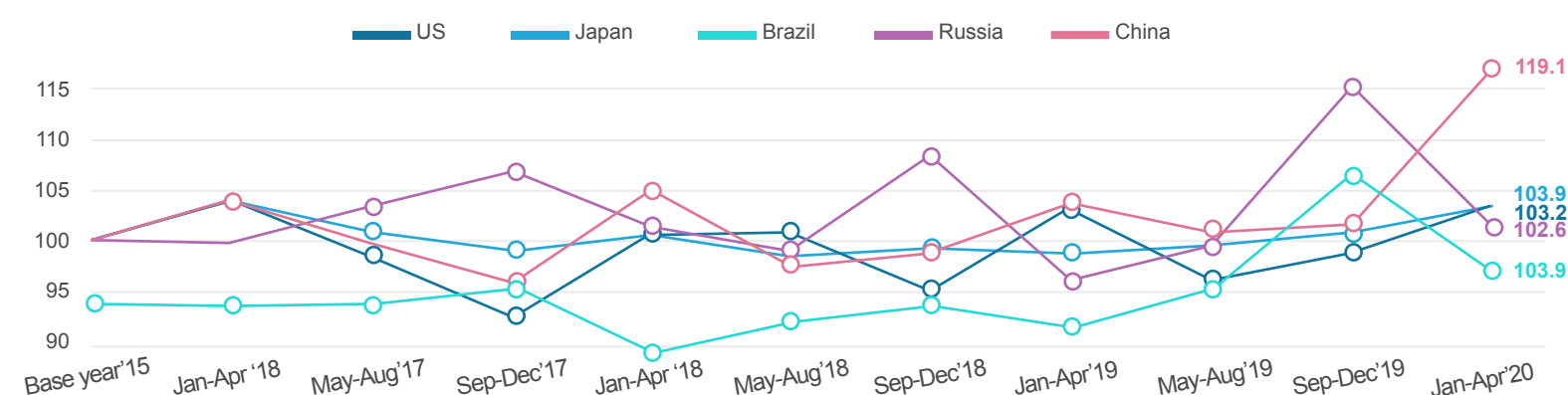


The Long-Haul Travel Barometer is a unique tool that monitors the sentiment among potential travellers from six key source markets for Europe - Brazil, China, India, Japan, Russia and the United States (US). Results are forward-looking and shed light on the preferences, motivations and barriers related to travel to Europe in the short-term. The words 'travellers', 'respondents' and 'tourists' are generally used interchangeably, when they have been used, for no other reason than to add variety to the language.

This Barometer provides results for the travel horizon January-April 2020. Insights are based on data collected in December 2019.

THE SENTIMENT INDEX FOR TRAVEL TO EUROPE IS POSITIVE IN ALL MARKETS

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



*Index values for each wave are calculated based on corresponding waves in previous years. - as shown in the picture



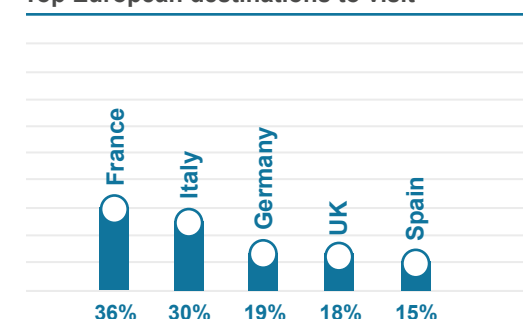
In Brazil, travel confidence improves with the gradual economic recovery and moderate wage growth. Nearly 1 in 2 respondents shared intentions to spend some time in Europe over the next months. Relying on consumers data collected prior the recent coronavirus outbreak, results highlight Europe's lure to Chinese, with a sentiment index reaching a record 119p. However, concerns about the spread of the virus have escalated over the past weeks and are expected to curtail international as well as domestic Chinese travel in 2020.



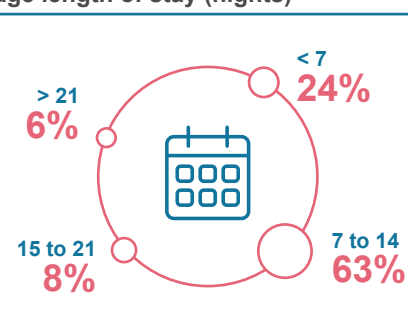
The sentiment index for travelling to Europe is positive in the US, Russia and Japan (103p for all three). However, only 29% of the respondents in Russia and the US, and 18% of those in Japan plan to visit the region in the first four months of the year, potentially reflecting a gloomy appraisal of the financial prospects in the short-term.

EUROPE'S HISTORY, CULTURE AND GASTRONOMY ATTRACT THE ATTENTION OF MANY AMERICANS

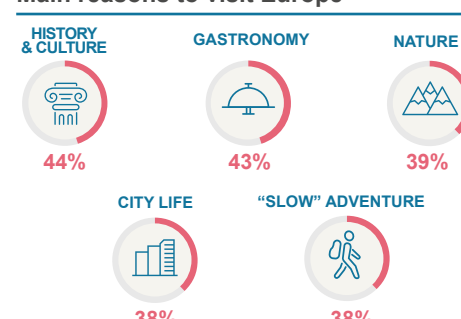
Top European destinations to visit



Average length of stay (nights)

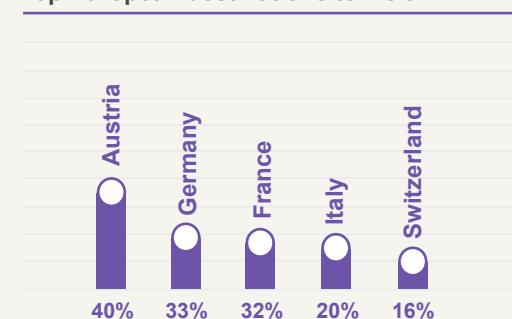


Main reasons to visit Europe

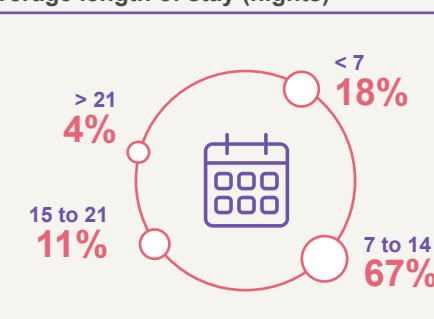


IN JANUARY-APRIL, INDIANS ARE LOOKING FOR DESTINATIONS FAMOUS FOR NATURE AND WINTER SPORTS

Top European destinations to visit



Average length of stay (nights)

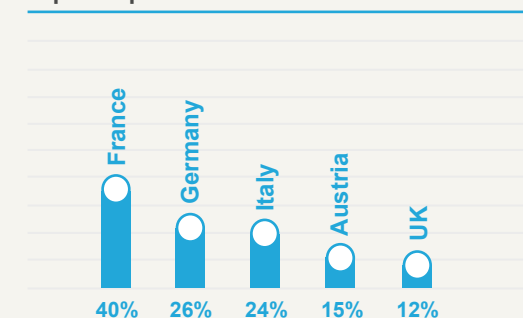


Main reasons to visit Europe

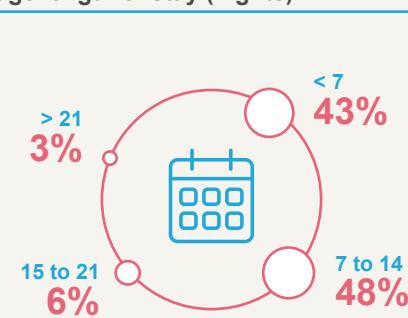


EUROPE'S CULINARY SCENE LURES AN INCREASING NUMBER OF JAPANESE TOURISTS

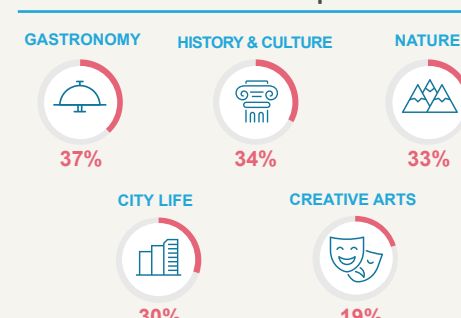
Top European destinations to visit



Average length of stay (nights)

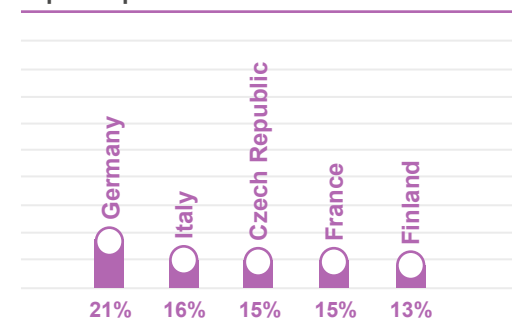


Main reasons to visit Europe

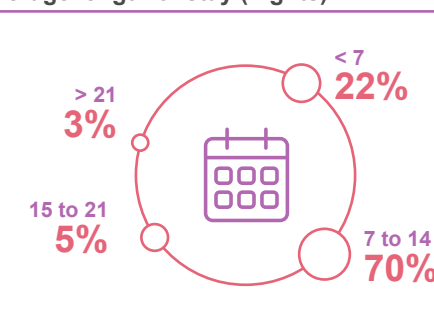


RUSSIANS SHOW GROWING INTEREST IN "SLOW" ADVENTURE EXPERIENCES

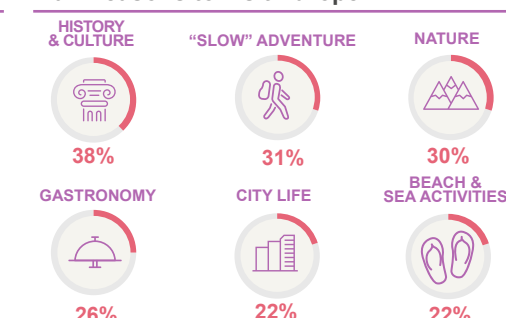
Top European destinations to visit



Average length of stay (nights)

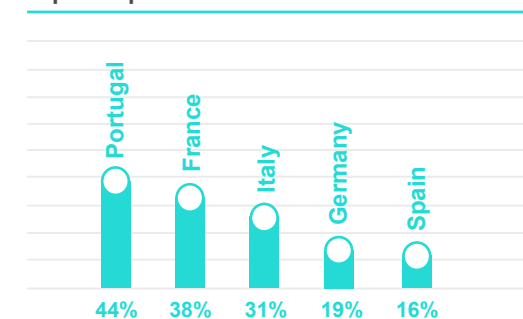


Main reasons to visit Europe

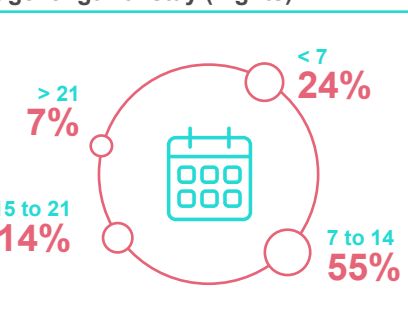


EUROPE'S VASTLY RICH HISTORY AND GASTRONOMIC CULTURE SPARK THE INTEREST OF BRAZILIANS

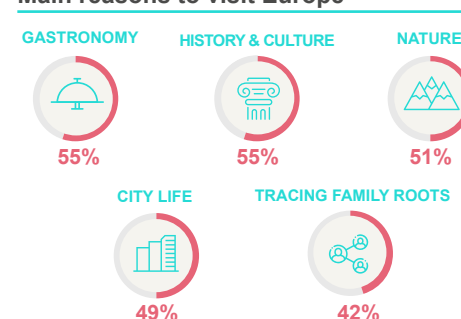
Top European destinations to visit



Average length of stay (nights)

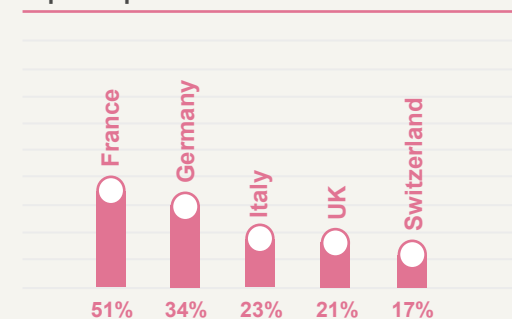


Main reasons to visit Europe

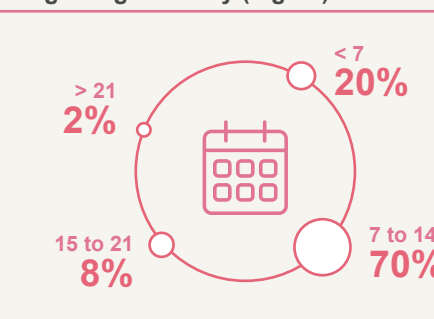


CHINESE ARE INCREASINGLY INTERESTED IN SAMPLING NEW AND UNFAMILIAR CUISINE WHILE IN EUROPE

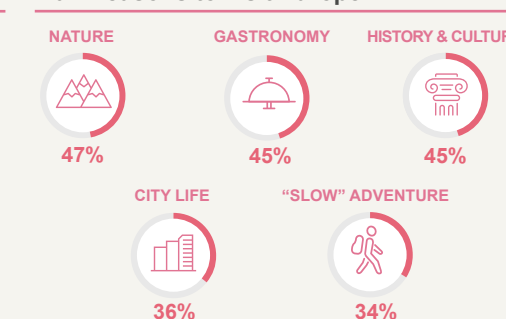
Top European destinations to visit



Average length of stay (nights)



Main reasons to visit Europe



Fieldwork: December 2019
Sample sizes: Brazil: 469; China: 674; Japan: 183; Russia: 298; USA: 293; India: 732

The Long-Haul Travel Barometer captures people's intention to travel abroad and is not meant to quantify prospect demand levels. The findings are brought to you by the European Travel Commission, European Tourism Association (ETOA) by Eurail B.V. and the European Commission. The project is realised by TCI Research. All rights reserved.



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