

DESTINATION EUROPE

LONG-HAUL TRAVEL BAROMETER

October 2019

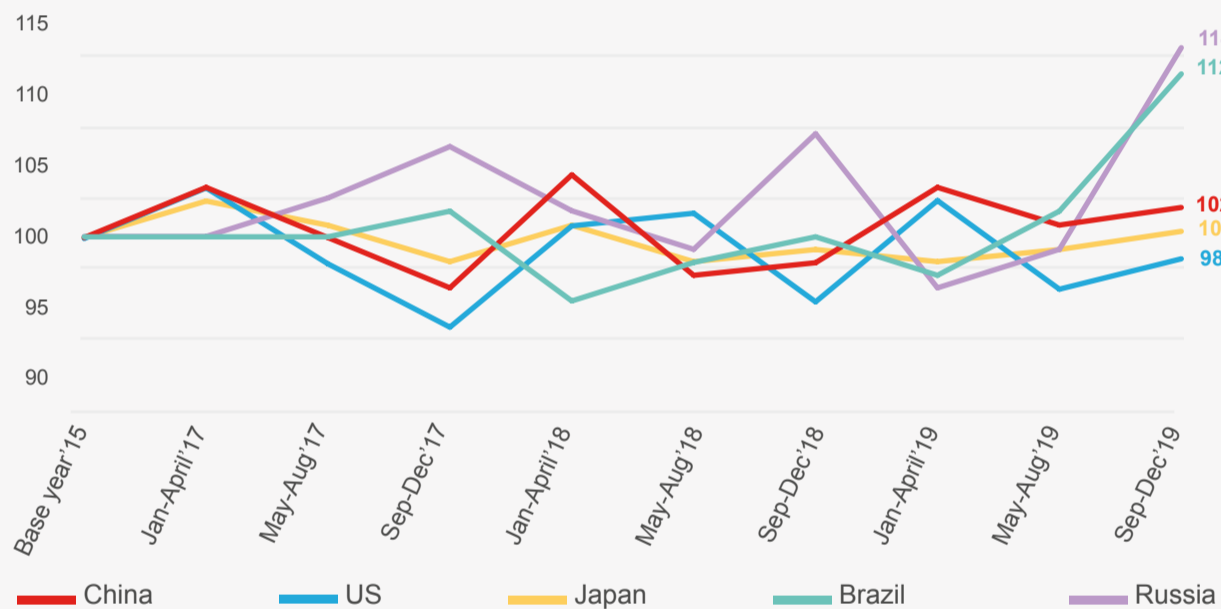
The Long-Haul Travel Barometer monitors the travel sentiment among potential travellers from Brazil, China, India, Japan, Russia and the United States (US). Results shed light on preferences, motivations and barriers related to travel to Europe. Findings are based on 1,000 interviews conducted in each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



POSITIVE SIGNALS FOR EUROPEAN TOURISM FROM MAJOR LONG-HAUL MARKETS

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



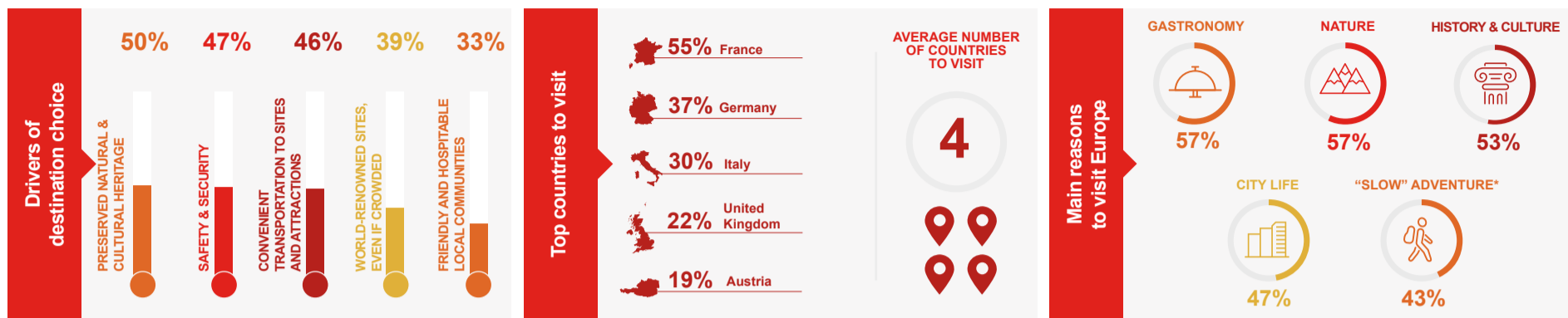
*Index values for each wave are calculated based on corresponding waves in previous years. - as shown in the picture

The travel sentiment index in Brazil and Russia is on the rise! 4 in 5 respondents who plan to travel long-haul in September-December, intend to visit a European destination. Improving air connectivity between Brazil and European countries and Russians' interest in off-peak seasons are some of the factors contributing to this positive trend. The sentiment index stays positive in China, owing to the popular travel period around the Golden Week (October 2019) and trade tensions, which may result in market share gains for Europe.

The first survey results from India reveal a firm intention for overseas travel in the last months of 2019. The majority of respondents (70%) expressed interest to visit a European destination, 3% have plans to visit other overseas destinations, while 23% have no plans to travel.

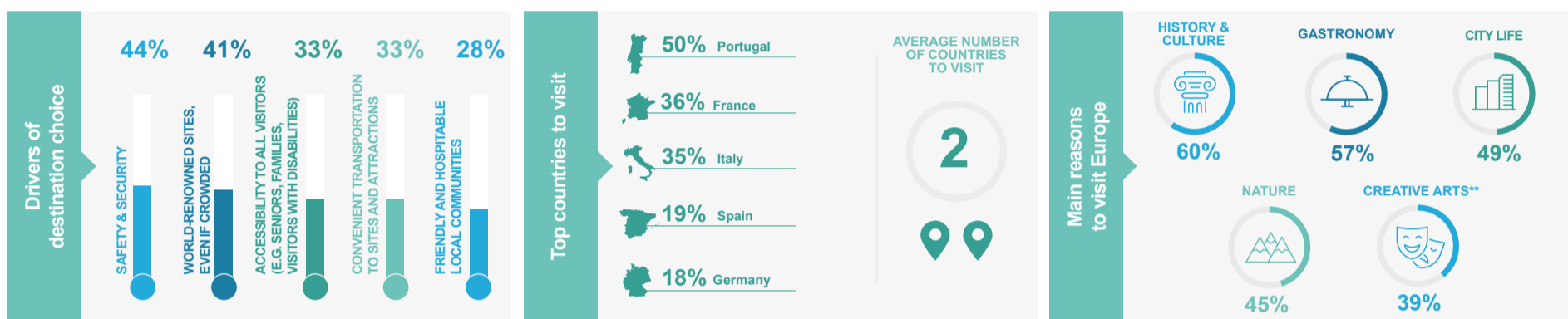
US and Japan are the only exceptions from the positive trend. The sentiment index for travelling to Europe is weak in both markets. Concerns about the frequently shifting trade environment and frail consumer confidence seem to negatively impact the travel sentiment in these markets.

CHINESE TRAVELLERS ARE INTERESTED IN DESTINATIONS THAT PRESERVE THEIR NATURAL AND CULTURAL HERITAGE AND ARE PERCEIVED SAFE. GASTRONOMIC EXPERIENCES AND NATURAL SCENERIES ARE WHAT WILL BRING CHINESE TO EUROPE THIS AUTUMN/WINTER SEASON.



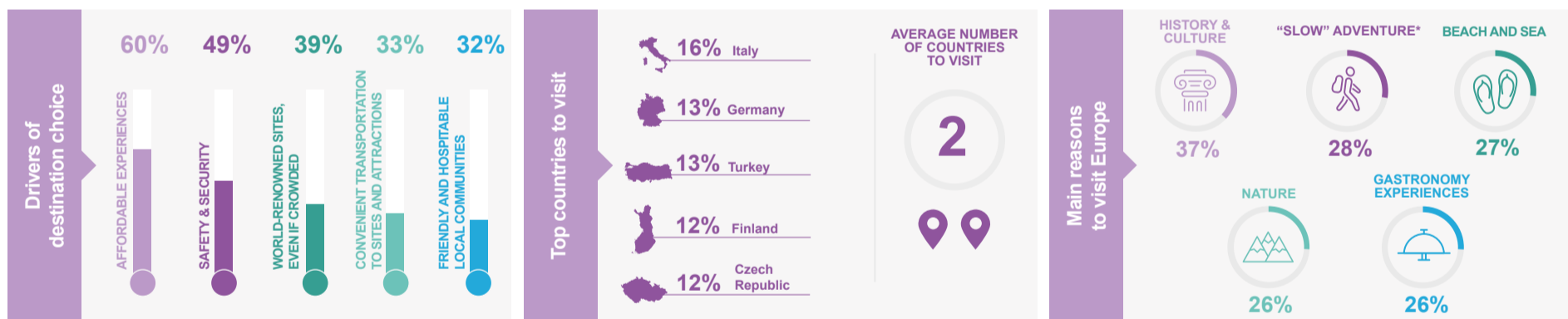
Sample size China: 563

BRAZILIANS LOOK FOR DESTINATIONS WHERE THEY CAN SEE OLD MONUMENTS, CHURCHES, CASTLES AND OTHER OBJECTS OF CULTURAL SIGNIFICANCE, EVEN IF CROWDED. THIS SEASON, THEIR INTEREST IS MAINLY FOCUSED ON 5 EUROPEAN COUNTRIES – PORTUGAL, FRANCE, ITALY, SPAIN AND GERMANY.



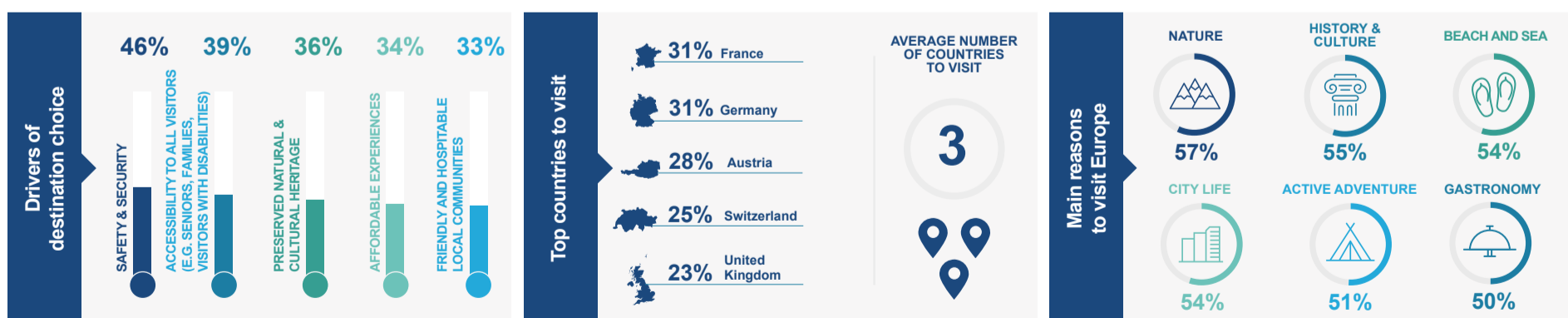
Sample size Brazil: 541

RUSSIANS LOOK FOR DESTINATIONS THAT ARE REASONABLY PRICED AND ARE PERCEIVED AS SAFE. BESIDES EUROPE'S RICH CULTURE AND HISTORY, RUSSIANS SEEK "SLOW ADVENTURES" THAT WOULD ALLOW THEM TO IMMERSE INTO THE DESTINATION'S LIFE AND CULTURE AND ENGAGE WITH LOCALS.



Sample size Russia: 396

SAFETY AND ACCESSIBILITY ARE IMPORTANT FOR THE SELECTION OF A HOLIDAY DESTINATION. INDIANS CONSIDER EUROPE'S LANDSCAPES, HISTORICAL SITES AND CULTURAL EVENTS THE MAIN REASON TO VISIT EUROPE THIS AUTUMN/WINTER SEASON



Sample size India: 698

** "Slow" adventure refers to experiencing local life and cultures, engage with locals, road trips, backpacking, etc.
** Creative arts refers to music, film or literature festivals, photography or painting workshops, etc.

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, India, 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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