

LONG-HAUL TRAVEL SENTIMENT POINTS AT CONTINUED APPEAL OF EUROPEAN DESTINATIONS IN PEAK SEASON

Travel sentiment in Europe's key long-haul travel markets proves upbeat for the summer travel period as shown by the latest results of the Long-Haul Travel Sentiment Survey, a joint initiative of the European Travel Commission (ETC), the European Tourism Association (ETOA), and Eurail Group G.I.E., in partnership with TCI Research. The survey provides the European tourism sector with early indications on travel demand developments from non-European markets.

Brussels, 16th June 2015 – Latest results indicate strong growth potential from long-haul markets for the European tourism sector in the coming summer holiday season (May-August 2015). Despite continued reports of volatile economic conditions and political tensions, survey data collected in the five key markets of Brazil, China, Japan, Russian Federation and the United States of America highlight the enduring position of European destinations in respondents' minds.

Key findings:

Destination Europe is top of the wish list: Four in five Brazilians, Chinese, Russians¹, and US citizens who plan to travel long-haul this summer, intend to visit a destination in Europe. Across all markets, travel experiences that are top-of-mind for Europe include enjoying nature and scenic landscapes, seeing famous landmarks, and learning about the history and cultural heritage of the destination visited.

Intention to travel long-haul increases in key markets: Respondents in four out of the five markets surveyed are more optimistic about taking at least one trip outside their region of residence in the coming months (May-August) than they were at the beginning of 2015 (January-April). This correlates with general expectations for the upcoming peak travel season. Brazilian respondents are the only exception to this positive trend.

Asian markets are keener on travelling outside the region: Three in five respondents from China intend to travel outside Eastern Asia, as positive sentiment increases. Japanese intention to travel saw the biggest boost, though only one in five Japanese travellers is planning an international trip during the main holiday season. France, Germany, Italy and the United Kingdom are confirmed as Chinese and Japanese respondents' preferred destinations for this summer.

US travel sentiment stays positive in the wake of slowing economic recovery. Two in five US respondents plan to travel outside North America this summer. Positive sentiment improved compared to the first months of 2015, dispelling concerns in the short-term over the potential impact of weakened GDP growth and softening consumer confidence on long-haul travel. As the euro and dollar head towards parity, Europe has become a cheaper place to travel in their eyes: four in five of those

¹ In all markets, the survey monitors respondents' intention to travel outside the region of residence (e.g. North America for the USA). The only exception is the Russian Federation, where intention to travel outside the Commonwealth of Independent States is measured.

respondents intending to travel outside North America have a European country as their main destination.

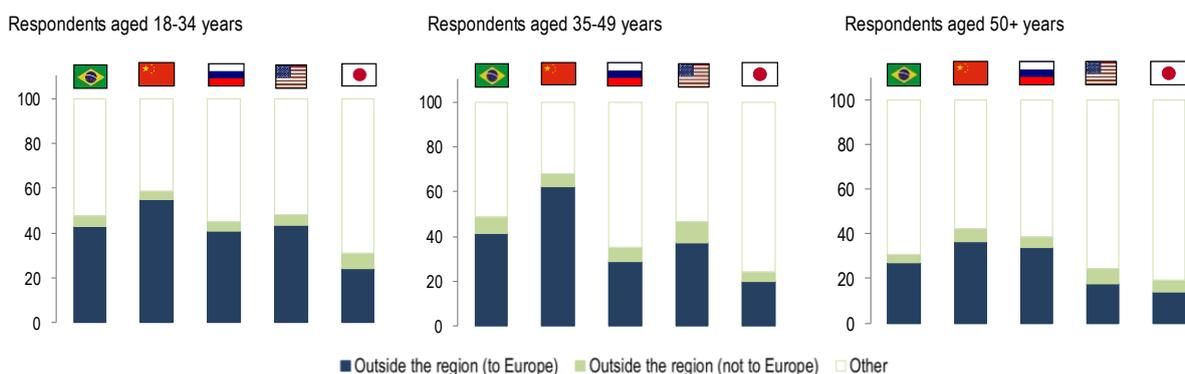
Economic uncertainty begins to affect Brazil: A deepening recession and ongoing currency depreciation appears to have dampened Brazilians’ travel intentions. Brazil remains the only market under scrutiny where travel sentiment stagnated at the same level reported for the travel horizon January-April 2015 – two in five respondents plan to travel internationally in summer 2015.

Long-haul travel sentiment is strongest among the young and middle-aged

The survey confirms that people aged 18-34 and 35-49 years are optimistic about their travel plans this summer. In emerging markets, middle-aged Chinese (35-49 years) are the most eager to travel longer distances in the coming months, with two in three respondents planning to take an international trip. The picture is reversed in the Russian market, where the youngest group (aged 18-34 years) was the most optimistic about their travel plans for the 2015 summer season. Travel sentiment among Russian respondents aged 50+ years is equally positive – two in five intend to travel this summer, predominantly to European destinations.

In the United States, survey data indicates that especially people aged between 35 and 49 years are now more eager to travel internationally during the peak season (May-August) than in the first four months of 2015. However, European destinations occupy a more robust positioning in the youngest age group. Nine out of ten Americans aged 18-34 years who intent to travel internationally prefer to take a trip in Europe, as compared to four in five from the middle-aged segment.

Intention to travel outside the region of residence by country and age segment
May-August 2015



Source: ETC Note on Russian Federation: the region is limited to the Commonwealth of Independent States.

The next release on the Long-Haul Travel Sentiment Survey will be available in October 2015 and aims to capture travel sentiment for key markets for the period September-December 2015.

About the Long-Haul Travel Sentiment Survey

The Long-Haul Travel Sentiment Survey is a joint initiative of the European Travel Commission (ETC), the European Tourism Association (ETOA) and Eurail Group G.I.E., in partnership with TCI Research. Based on 1,000 interviews in five long-haul markets, every four months the survey monitors people’s

intention to travel and captures key characteristics of their trip, travel motivations and barriers included. The stratified sample is representative of the travel population in each market. The survey is meant to gauge travellers' attitudes and intentions, and is not meant to quantify prospect demand levels.

Full results are available to the members of partner organisations only, and key results will be regularly made available through the website of partner organisations. Private companies and public organisations, who are interested in joining this initiative, are kindly invited to contact Ms Stefanie Gallob (ETC): stefanie.gallob@visiteurope.com.

More information is available at ETC's corporate website under the following link: www.etc-corporate.org.

Note to editors:

The European Travel Commission is an association of National Tourism Organisations (NTOs). It was created in 1948 to promote Europe as a tourism destination to the long-haul markets outside Europe, originally in the USA and later in Canada, Latin America and Asia. It currently has 33 member NTOs, including 8 from outside the European Union.

Europe is the world's No. 1 tourist destination with 584 million international arrivals and more than 50% of the market share of worldwide tourism.

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For further information: the ETC's corporate website www.etc-corporate.org is aimed at industry, government and educational personnel interested in tourism to Europe.

Tourists seeking travel-specific information and ideas are directed to the ETC's consumer portal www.visiteurope.com.