



## **WHAT DO PEOPLE EXPECT FROM THEIR LEISURE TIME IN EUROPE?**

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Head of Public Affairs

**EUROPEAN  
TRAVEL  
COMMISSION**

# EUROPEAN TRAVEL COMMISSION

SINCE 1948

POWERED BY



## European Tourism in 2015



51% of international tourist arrivals  
9% of European GDP

### MISSION

Strengthen the sustainable development of Europe as a tourist destination and to increase competitiveness, through knowledge gathering and sharing amongst members and lobbying as well as by establishing a professional marketing platform for the successful promotion of member countries in overseas markets.

### MEMBERS

32 National Tourist Organisations (NTOs) in Europe.

### MANDATE

ETC is responsible for the promotion of Europe as a tourist destination.

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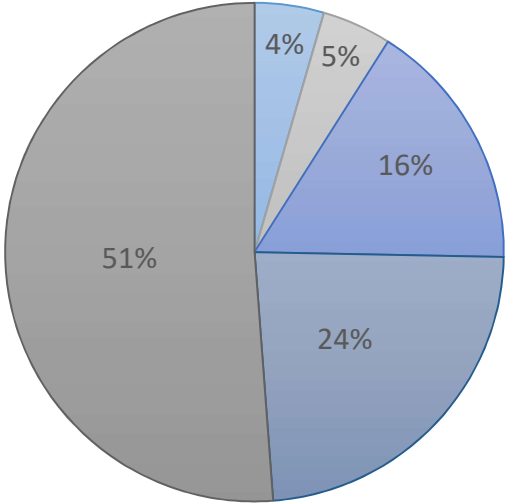


# Members

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# European Tourism Demand

More than **50%**  
Share of Worldwide Tourism



- Middle East
- Africa
- Americas
- Asia and the Pacific
- Europe

More than **600**  
million Tourist Arrivals 2016



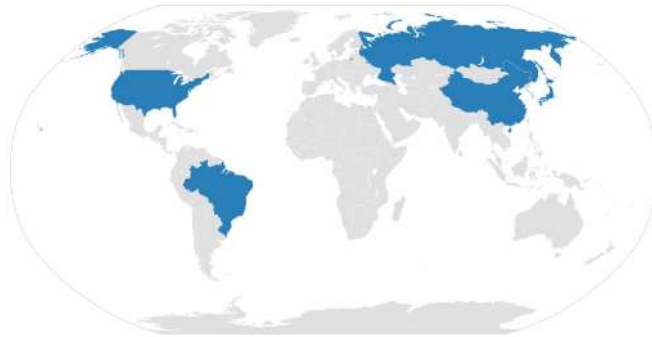
Source: ETC Dashboard. Tourism Economics. UNWTO

# Long-Haul Travel Barometer

The Long-Haul Travel Sentiment Survey captures people's intention to travel to medium and long distance destinations, their motivations and barriers to travel, as well as key characteristics of their trip.

It monitors travel to destinations **outside the region of residence** and to **Europe** from:

**5 markets:**



**1,000** interviews per market

**3** times a year



**January**  
-  
**April**

**May-**  
**August**

**September**  
-  
**December**

- intention to travel abroad
- motivations and barriers to travel
- key characteristics of the trip

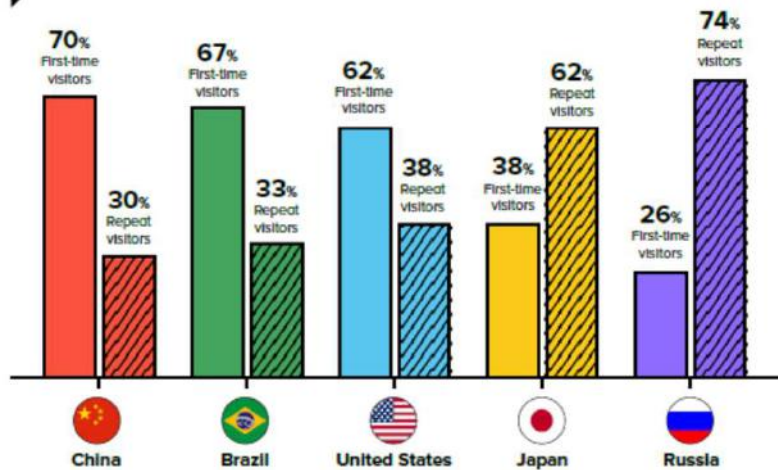
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# FIRST TIME vs REPEAT VISITORS



## EUROPE REMAINS AN UNEXPLORED DESTINATION FOR MANY LONG-HAUL TRAVELLERS

Previous European travel experience by country of origin



**NEARLY TWO THIRDS** of Chinese, Brazilian and American respondents are visiting Europe for the first time.



**74% OF RUSSIAN & 62% OF JAPANESE RESPONDENTS** have visited European destinations before and are looking forward to their repeat visit.

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## TRAVEL MOTIVATIONS ARE DIVERSE

Repeat visitors seeking more in-depth experiences than first-time visitors



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**Russian respondents** demonstrate the highest interest in visiting as much as possible in a short time whilst in Europe (**18%**) and prefer to spend their holiday in an active way (**9%**)



Compared to other long-haul travel markets **Chinese respondents** had stronger interest (**6%**) in pursuing the European shopping experience

## CROSS CULTURAL DIFFERENCES REFLECT ON RESPONDENT'S CHOICE OF ACTIVITIES



**Japanese respondents** appear to be most interested in enjoying nature and scenic landscapes within Europe (**18%**)



**Brazilian (10%) and American (6%) respondents** devote higher importance to relaxation and recharging than the respondents from the other long-haul travel markets

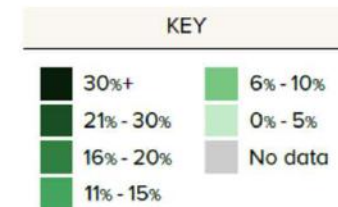
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# MILLENNIALS

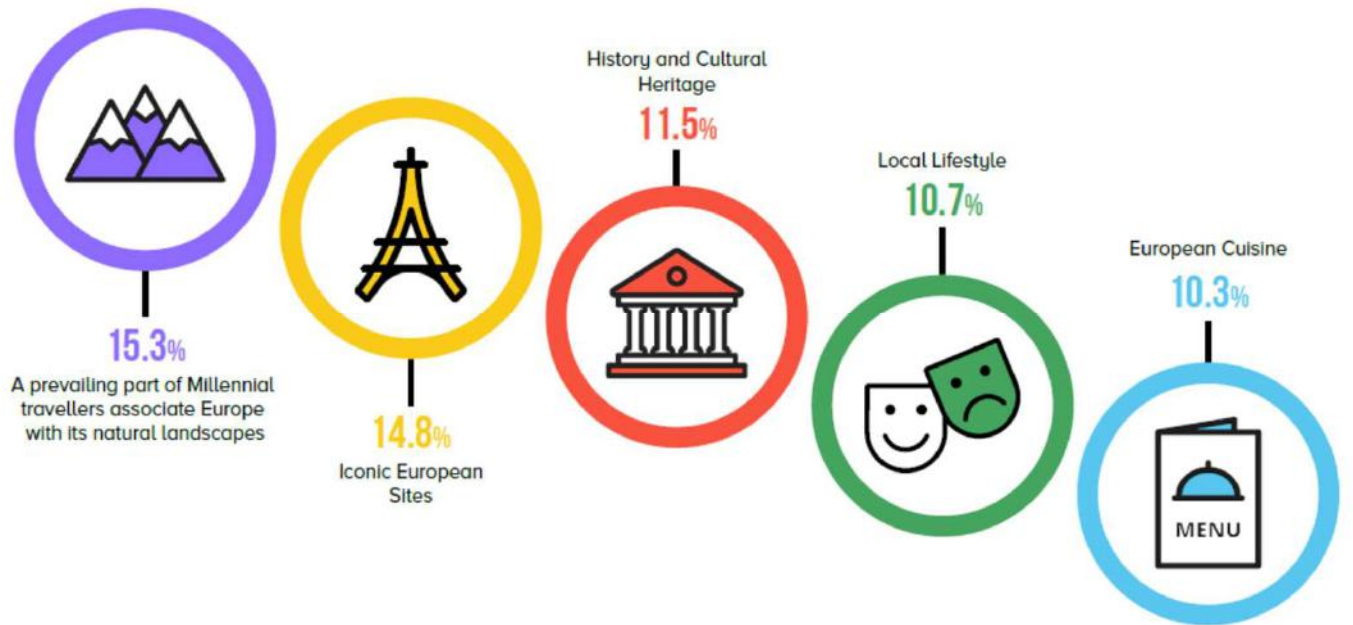


Top destinations for potential travelers aged 18-34 years (for all markets)



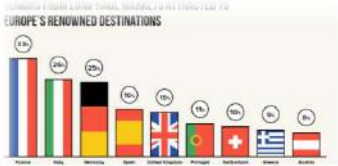
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# Natural beauty and authentic, local experiences



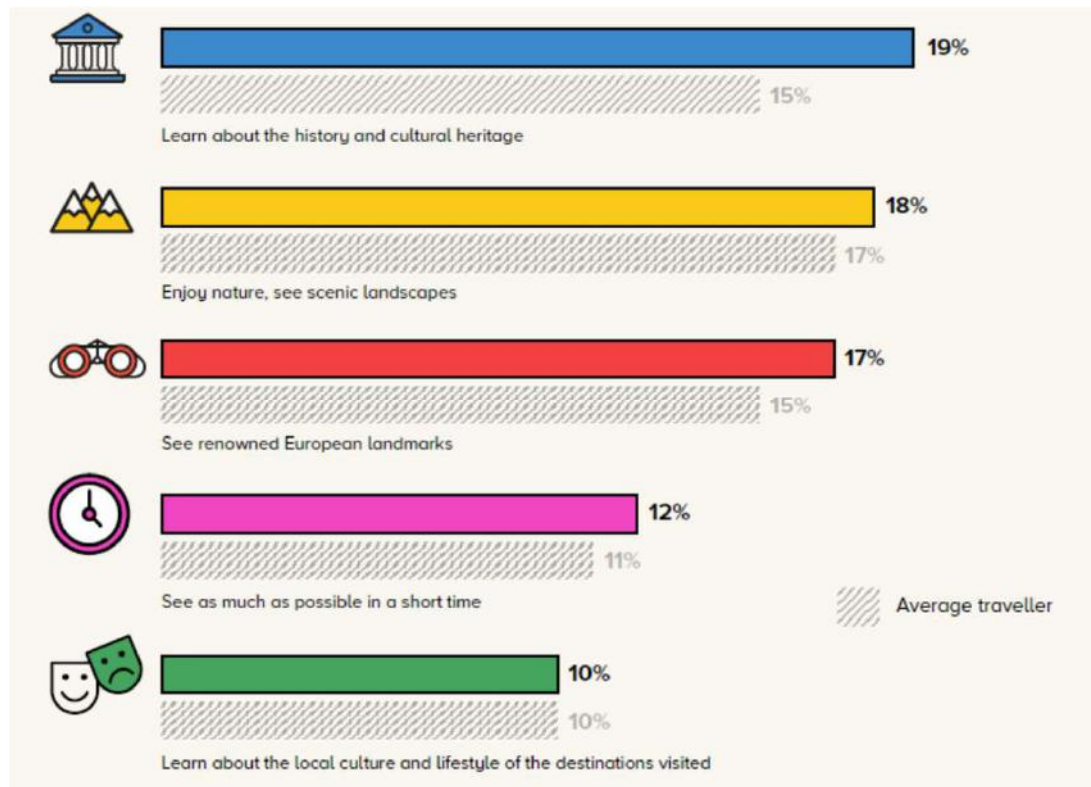
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# SENIORS

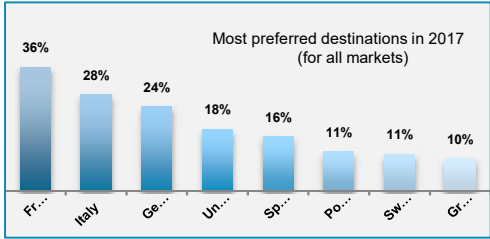
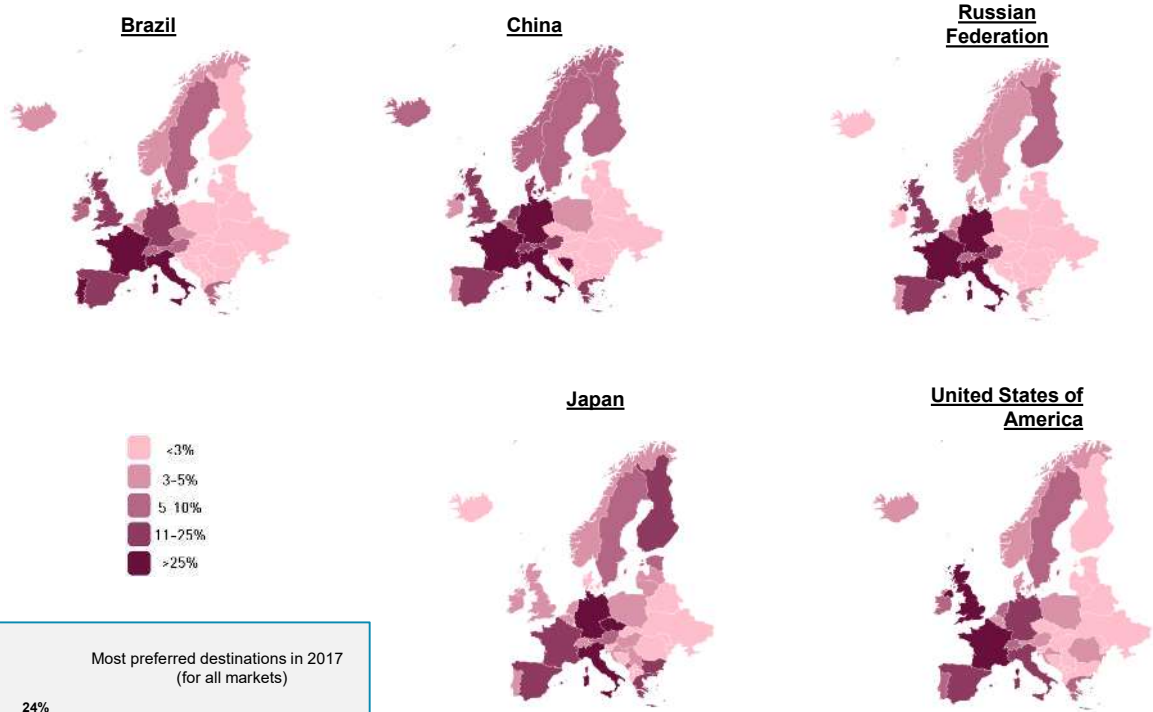


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# History, Cultural heritage and Natural Landscapes



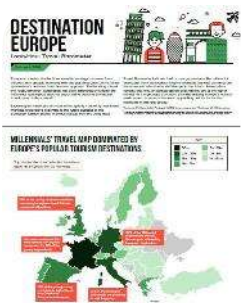
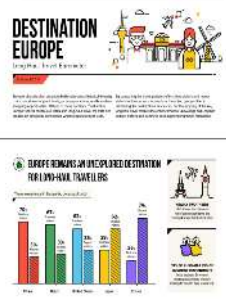
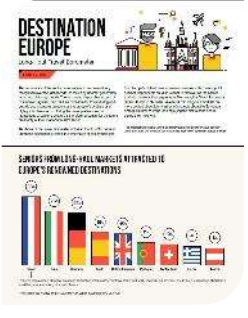
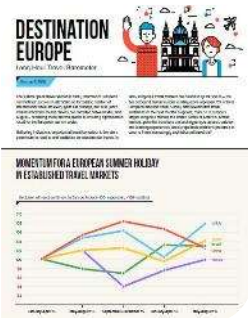
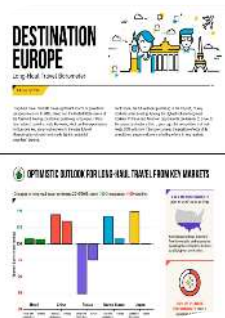
# Destination Europe: prospects for 2017



Horizon: 12 months | January-December 2017

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# Infographics on Intention to Travel



Available at  
[etc-corporate.org/reports/long-haul-travel-barometer](http://etc-corporate.org/reports/long-haul-travel-barometer)





THANK YOU FOR YOUR ATTENTION!

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