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LONG-HAUL TRAVEL BAROMETER 1/2023

TRAVEL HORIZONS: JANUARY- DECEMBER & JANUARY- APRIL

eurail
EUROPEAN TRAVEL COMMISSION
Co-funded by the European Union

LONG-HAUL TRAVEL BAROMETER

METHODOLOGY

- **Target -** Potential travellers from Australia, Brazil, Canada, China, Japan, Russia* and the US.
- **Method** – 1,000 online interviews with national representatives (18-70 years old), per market, per wave.
- **Frequency:** Interviews are conducted 3 times per year and provide insights into the travel horizons: January-April, May-August and September-December.

TRAVEL THEMES EXAMINED:

- People's intention to travel outside their region of residence*
- Concerns and barriers to travel
- Important criteria for the selection of destinations
- Travel preferences regarding destinations, experiences and mode of transportation

*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 the intention to travel outside the Commonwealth of Independent States is measured.

Data files are only available to the members of partner organisations.
The survey is meant to gauge travellers' attitudes and intentions and is not meant to quantify demand levels. For more information on the index calculation, please consult the methodology.

This issue of the Long-Haul Travel Barometer does not include information on the Russian travel market

This project is realised with the support of: TCI Research – Travel Competitive Intelligence

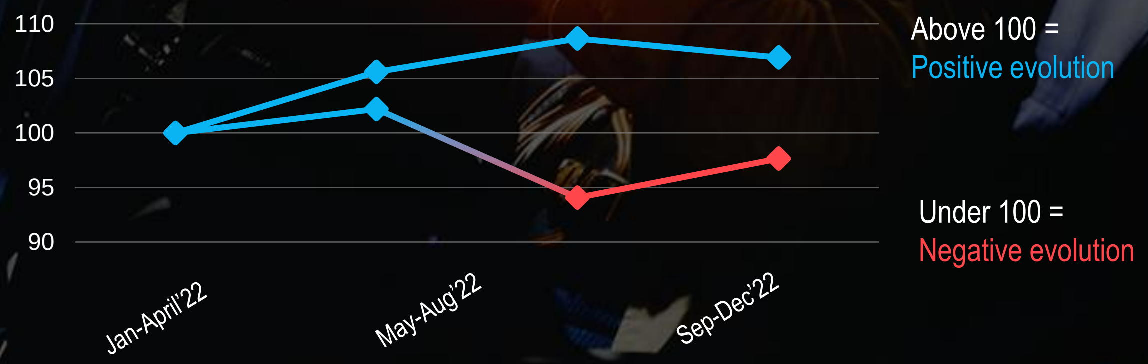
HOW TO READ THE RESULTS?

Intention to travel is measured on an index that reflects the dominant sentiment expressed by a market; either positive or negative. The index is tied to a base of 100. Values above 100 indicate a positive evolution, whereas values below 100 indicate negative attitudes towards travel in a given time period.

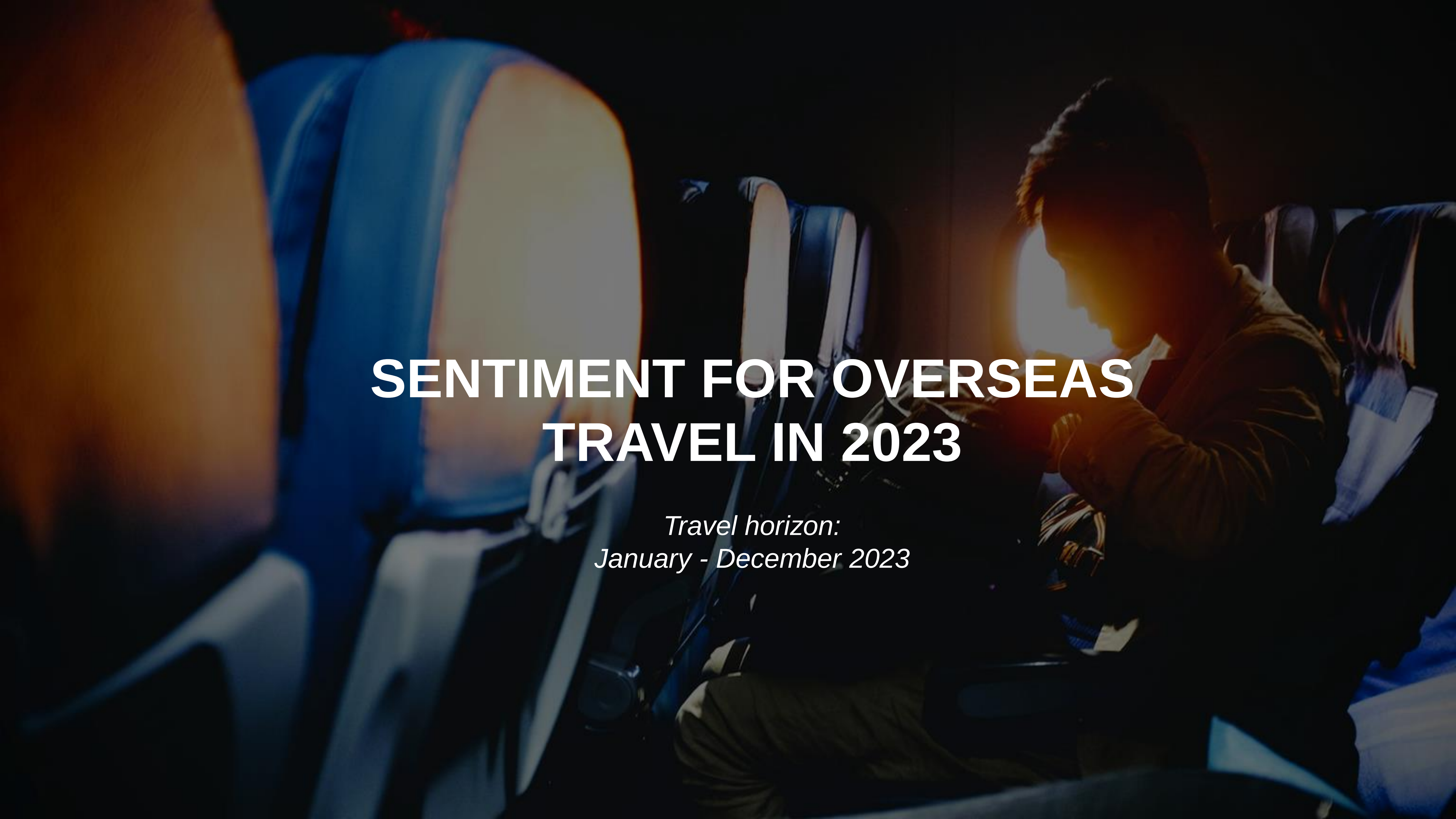
The Long-Haul Travel Barometers capture people's intention to travel abroad and are **not meant to quantify the prospect demand levels.**

Long-Haul Travel Sentiment Index (base 100, 2015)

Values on this graph are fictive



- Insights in the following slides refer to the travel horizon January-December 2023 (12 months horizon) and January –April 2023 (4 months horizon)
- The fieldwork was conducted in December 2022



SENTIMENT FOR OVERSEAS TRAVEL IN 2023

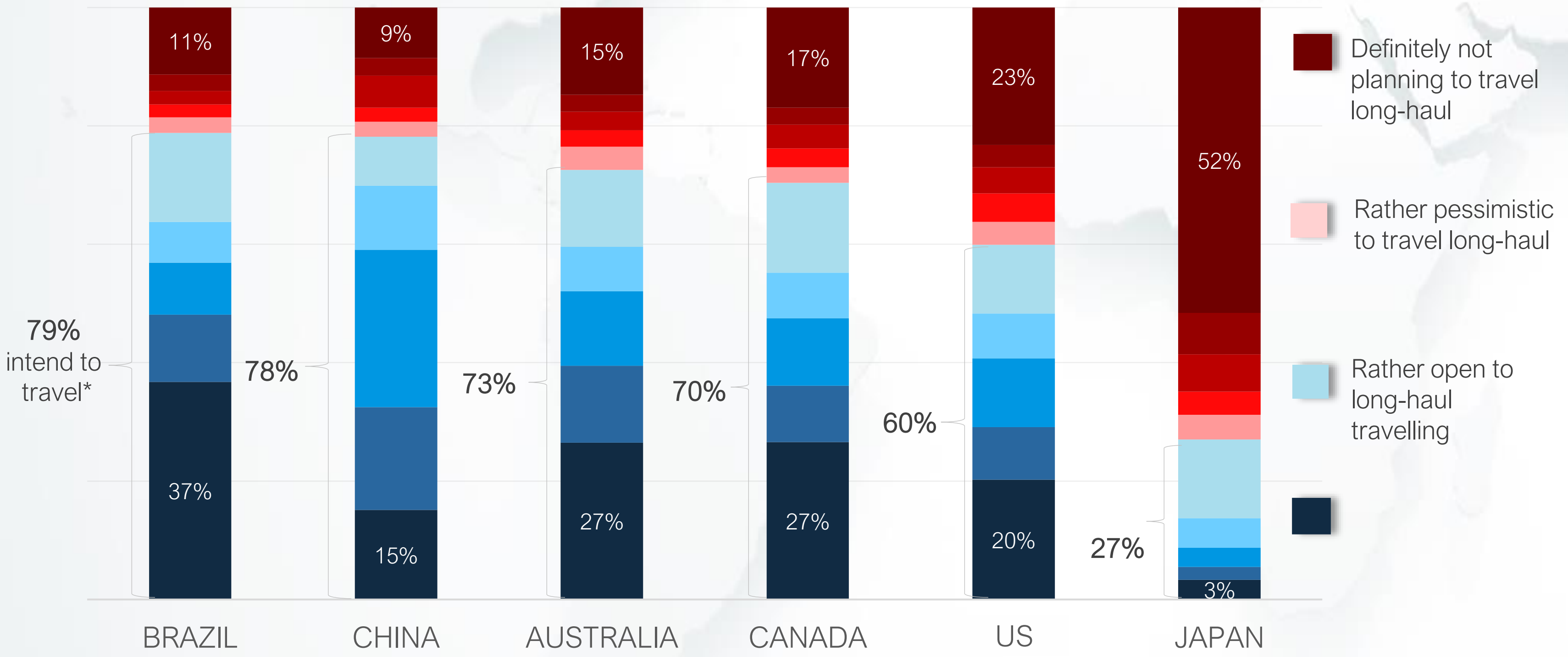
Travel horizon:
January - December 2023

INTENTION FOR LONG-HAUL TRAVEL PICKS-UP IN 2023

TRAVELLERS IN KEY MARKETS ARE OPEN TO VISITING FAR-AWAY DESTINATIONS THIS YEAR.

THE POSITIVE RESULT REFLECTS A RENEWAL OF CONFIDENCE AND PROVIDES GROUND FOR OPTIMISM

Intention to travel long-haul in 2023 (% of respondents)



- Japan is the only surveyed market where people remain pessimistic about travelling outside their region of residence for another year.
- In other markets, the sentiment is strong, with at least 60% of respondents planning an overseas trip this year.
- Results are particularly optimistic among Brazilians, with 4 in 5 sharing their eagerness to travel long-haul, and 37% still demonstrated a high level of certainty.
- Travel intentions are also strong among Chinese (78%), potentially driven by the removal of the zero Covid-19 policy in December 2022, which happened during the data collection period. It should be noted, however, that the share of those most certain about travelling was lower (15%) than in other markets (e.g. Brazil, Canada and Australia, all +25%), signalling a continuation of the travel uncertainty.

Respondents are asked to use a slider from 1-100 (1- definitely not, 100 definitely yes) to express their intention to travel overseas in the next 12 months.

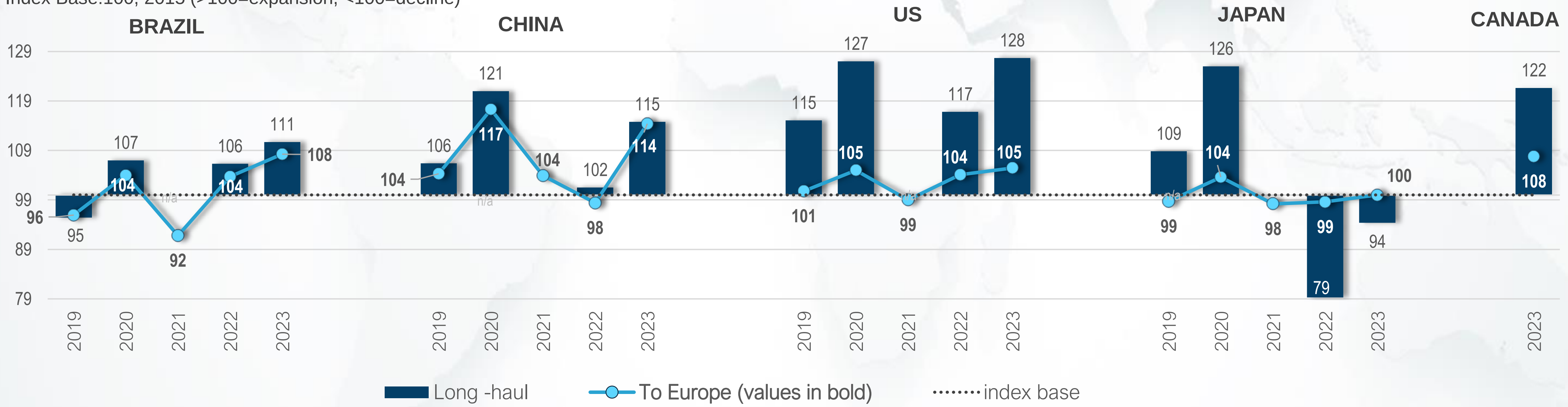
Sample: 1000 respondents per market

THE TRAVEL SENTIMENT INDEX SURPASSES PRE-COVID-19 VALUES IN BRAZIL, CHINA AND THE US

- The challenging economic context marked by high inflation and the surge in energy prices has not dampened travel desire for 2023. On the contrary, the long-haul travel sentiment index has reached its highest values in Brazil, China and the US in the last five years.
- In Canada, the sentiment index is also positive, with a slightly lower value when Europe is the destination. This could be attributed to some fears of economic recession and the perception of destinations within the region being expensive. 40% of Canadians who do not plan to travel outside North America this year mentioned their finances as the main reason.
- The picture remains gloomy in Japan, with sentiment index levels close to the base (100). On a positive note, the lifting of travel restrictions in nearby destinations and popular regions for Japanese (e.g., Europe and the Asia Pacific) may boost consumer confidence and drive some demand over the course of the year.

Evolution of intention to travel long-haul and to Europe (annual horizon)

Index Base:100, 2015 (>100=expansion, <100=decline)



- *Values above 100 indicate a positive evolution, whereas values below 100 indicate negative attitudes towards travel in each time period.*
- *Index values for Canada are not available for the years before 2023 as the market was not included in the project. Likewise, Australia has been recently added to the set of markets and the evolution of the index will be seen next January 2024*

CANADA

40% Personal finances

30% I did not plan to travel

10% Covid-19 concerns

6% Rising travel costs

US

41% Personal finances

30% I did not plan to travel

10% Rising travel costs

9% Covid-19 concerns

CHINA

47% Covid-19 concerns

24% I find it complicated to travel overseas due to Covid-19

13% I did not plan to travel

8% Personal finances

JAPAN

52% I did not plan to travel

20% Covid-19 concerns

19% Personal finances

6% I find it complicated to travel overseas due to Covid-19

BRAZIL

44% Personal finances

22% I did not plan to travel

19% Covid-19 concerns

9% I find it complicated to travel overseas due to Covid-19

AUSTRALIA

72% Personal finances

27% I did not plan to travel

11% Covid-19 concerns

10% Rising travel costs

TRAVEL BARRIERS

Concerns about personal finances may derail plans for overseas travel in 2023. While Chinese and Japanese respondents mention budget restraints less often, it worries Australian, Brazilian, American and Canadian travellers. Thus, destinations perceived as more affordable are likely to benefit from greater attention from these markets, at least in the short term. Overall, Covid-19 seems to have dropped down in respondents' list of concerns compared to 2022. However, markets in Asia and the Pacific are still cautious about it. It is worth noting that in some instances, Covid-19 appears as a bureaucratic hindrance which discourages people from travelling as it complicates the planning and pleasure of travel (e.g., the need to prepare many documents, take COVID-19 tests, monitor changing restrictions, etc.).

Sample: Respondents not planning to travel overseas in 2023

TRAVEL CONFIDENCE BOOSTERS

According to the survey results, improving personal finances would give 2 in 5 potential travellers peace of mind and freedom to plan long-haul trips in 2023. In a time of soaring living and travel costs, bargains and attractive deals become essential. Many travellers will try to minimise spending and look for destinations that provide affordable experiences (see next page). In addition, the removal of travel restrictions remains a main component for travellers' confidence, according to 25% of all respondents. Destinations that have lifted those may be perceived as more appealing this year.

CANADA

41% Improved personal finances

40% Bargains & attractive deals

31% Flexible cancellation policies

23% Fully-lifted travel restrictions

20% Less strained relation Russia-Ukraine

US

43% Improved personal finances

38% Bargains & attractive deals

27% Fully lifted travel restrictions

23% Flexible cancellation policies

22% Less strained relation Russia-Ukraine

CHINA

43% Destinations' effectiveness in managing Covid-19

35% Fully-lifted travel restrictions

31% Bargains & attractive deals

29% Improved personal finances

27% Government advice on international travel

JAPAN

43% Improved personal finances

22% Less strained relation Russia-Ukraine

18% Fully lifted travel restrictions

15% Bargains & attractive deals

12% Destinations' effectiveness in managing Covid-19

BRAZIL

49% Bargains & attractive deals

36% Improved personal finances

23% Getting vaccinates for Covid-19 / Pre-travel Covid-19 tests

18% Fully-lifted travel restrictions / Less strained relation Russia-Ukraine

AUSTRALIA

39% Bargains & attractive deals

37% Improved personal finances

33% Flexible cancellation policies

28% Fully-lifted travel restrictions

22% Less strained relation Russia-Ukraine

Sample: 1000 respondents per market

TRAVELLERS LOOKING FOR OVERSEAS ADVENTURES WILL PRIORITISE DESTINATIONS THAT THEY PERCEIVE AS SAFE, WITH GOOD TOURISM INFRASTRUCTURE AND AFFORDABLE EXPERIENCES

THE AVAILABILITY OF WORLD-RENOWNED LANDMARKS FINDS ITS WAY BACK TO THE LIST OF THE MOST IMPORTANT CRITERIA FOR THE SELECTION OF A HOLIDAY DESTINATION

Most important criteria for choosing a holiday destination overseas by market

	AUSTRALIA	BRAZIL	CANADA	CHINA	JAPAN	USA
The destination is safe to visit (e.g., no civil unrest, low crime rates, etc.)	35%	34%	35%	40%	34%	37%
High quality of tourism infrastructures	35%	36%	28%	40%	24%	32%
Affordable travel and experiences	35%	33%	41%	26%	34%	34%
The destination hosts must-see sites (e.g., Eiffel Tower, etc.)	31%	28%	25%	33%	43%	32%
Pleasant weather conditions	30%	24%	30%	34%	18%	31%
The destination preserves its natural and cultural heritage	19%	15%	16%	27%	14%	23%
Fully lifted travel restrictions	19%	16%	17%	26%	12%	19%
Low number of COVID-19 cases	19%	19%	14%	25%	14%	15%

Sample: 1000 respondents per market

SENTIMENT FOR OVERSEAS TRAVEL IN EARLY 2023

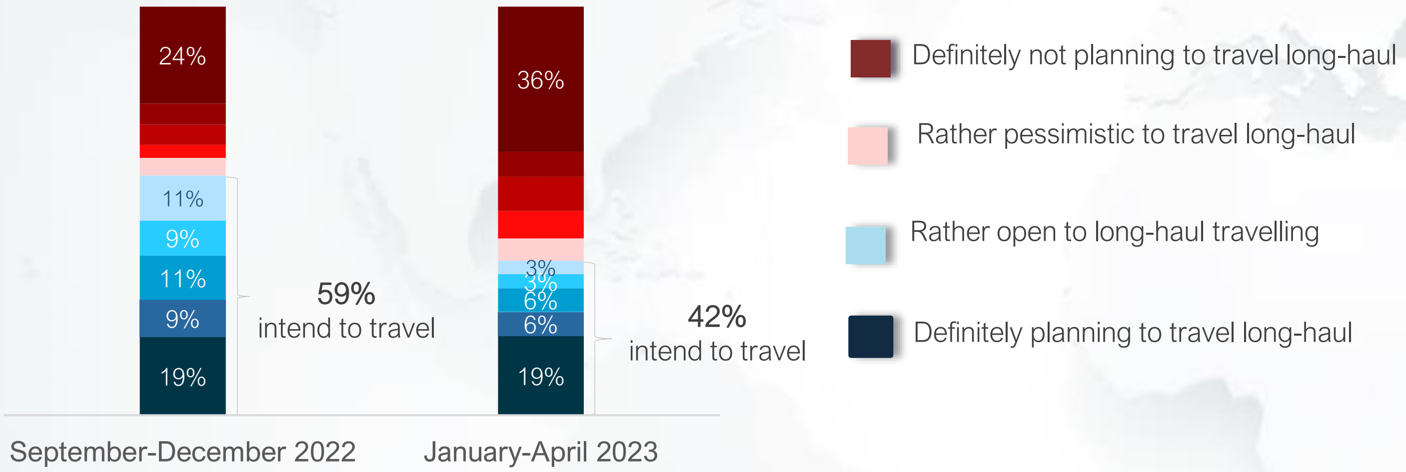
Travel horizon:
January - April 2023

AUSTRALIA: LONG-HAUL TRAVEL INTENTION

Travel horizon: January-April 2023

Evolution of intention to travel long-haul (4 months horizon)

% of respondents (N=1000)



THE SENTIMENT FOR LONG-HAUL TRAVEL SLIGHTLY SHRUNK COMPARED TO THE LAST QUARTER OF 2022

- 42% of surveyed Australians plan to take at least one long-haul trip between January-April 2023. The result is less positive than the previously surveyed period September-December 2022 (59%) but in line with the seasonal pattern of Australians travelling to Europe, i.e. lower propensity to travel during Q1 and Q2, and a higher one for Q3 and Q4.[1]
- Among Australians planning overseas trips in the following months, 35% have a European destination in mind, and only 7% intend to visit other regions, mainly South-East Asia and North America. A higher intention to visit Europe is notable among the younger respondents, i.e. 18-34 (56%) and 35-49 (49%) years old, while the more mature travellers shared less travel enthusiasm (27%).
- Tourism Economics forecasts that with the travel restrictions lifted across world regions, outbound travel from Australia will continue to recover in 2023 reaching 60% of its 2019 levels. 6.1mn Australian tourists are expected in Europe in 2025 (+7% over 2019).[2]

[1] VisitBritain - Market and Trade Profile: Australia | [2] ETC & Tourism Economics Dashboard

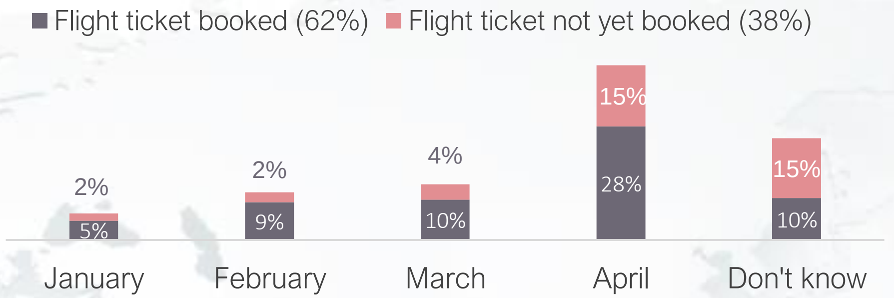
Australia has been recently added to the set of surveyed markets. The evolution of the index will be seen for the first time in September-December 2024

TRAVEL PREFERENCES OF AUSTRALIAN RESPONDENTS

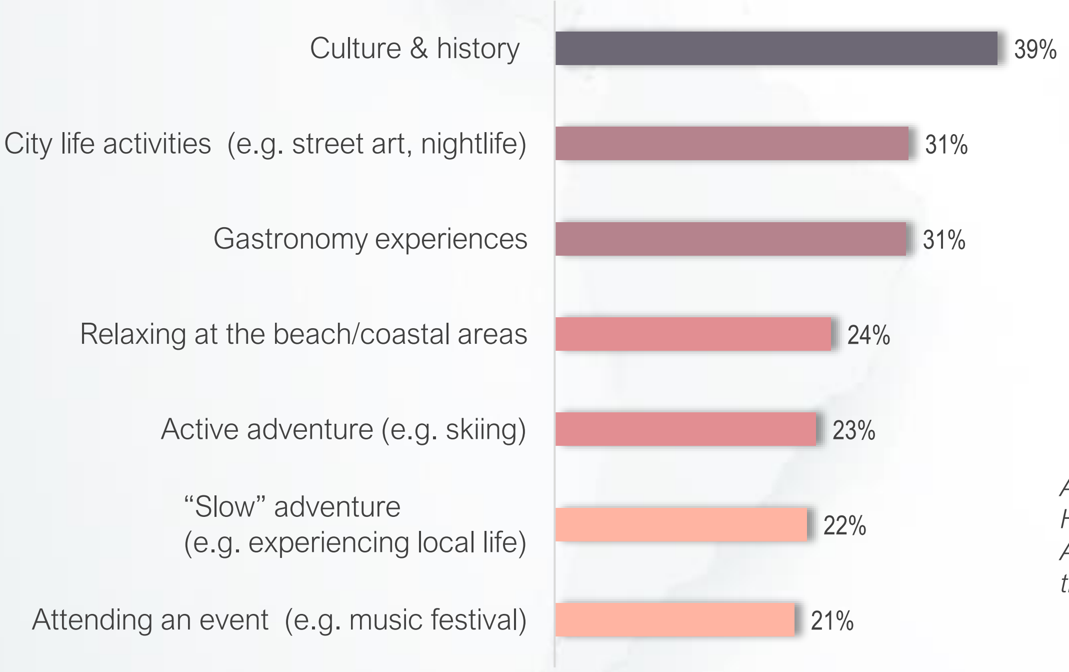
Destination: Europe | Travel horizon: January-April 2023

For the first months of the year, Aussies are attracted to three main types of European experiences: culture & history, city life experiences and anything related to gastronomy. Almost half of the respondents (43%) plan to travel with their spouse and will seek destinations that offer attractive offers, a well-developed infrastructure and host famous landmarks. On top of their mind are France, Germany, Italy and the UK.

Intended month of travel and booking status

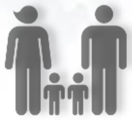


Most wanted types of activities



Travel companion & preferred destinations

43% of Aussies plan to travel to Europe with a spouse



29% with a family with small kids (under 18 y.o.)

Destination selection criteria

Affordable travel & experiences (39%)
High-quality tourism infrastructure (36%)
Availability of world-renowned sites (e.g., the La Sagrada Familia, 34%).

High-quality tourism infrastructure (50%)
Pleasant climate (36%)
Low number of Covid-19 cases (34%)

Top 10	
France	35%
Germany	28%
Italy	28%
United Kingdom	26%
Greece	21%
Austria	17%
Spain	14%
Switzerland	12%
Denmark	11%
Croatia	10%

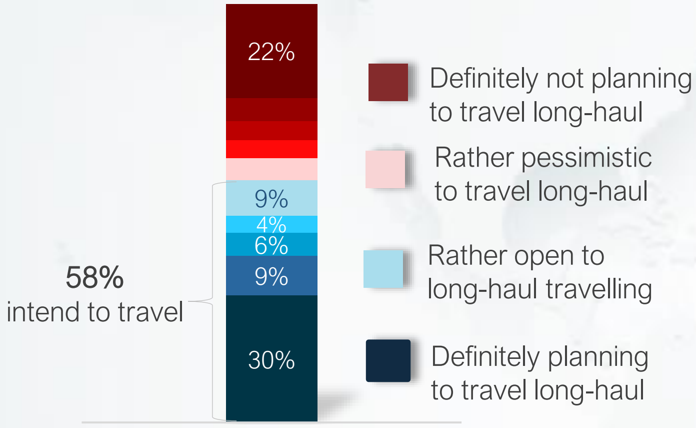
Sample: respondents wishing to visit Europe (n=348)

BRAZIL: LONG-HAUL TRAVEL INTENTION

Travel horizon: January-April 2023

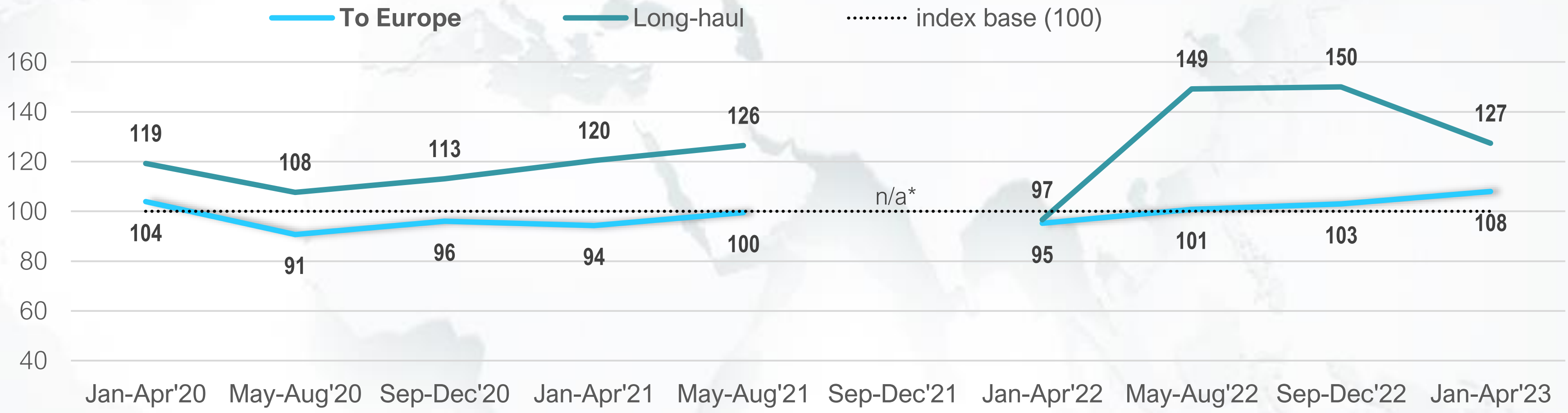
Intention to travel long-haul in the next 4 months

% of respondents (N=1000)



Evolution of intention to travel long-haul and to Europe (4 months horizon)

Index base:100 (>100 = expansion, <100 = decline)[1]



TRAVEL SENTIMENT IN BRAZIL STRENGTHENS AND CONFIRMS THE CONTINUED APPEAL OF EUROPEAN DESTINATIONS

- Nearly 60% of surveyed Brazilians intend to travel long-haul in the first months of 2023, with 51% having a European destination in mind. The sentiment index for travel to the region has increased by 12.8 pts over the same period in 2022 and reached a value of 108 pts that was not previously achieved. Yet, Brazil is expected to face economic challenges in 2023 as inflation reduces the savings accumulated during the pandemic, putting a strain on household incomes and slowing the recovery process.[1]
- The expressed optimism by Brazilian respondents should, therefore, be interpreted with care as the desire to visit Europe may be stronger than the immediate feasibility to travel. At this point, the biggest barrier to travel among Brazilians is personal finances.

[1] *Brazil Outbound Travel, Tourism Economics (Dec. 2022)*

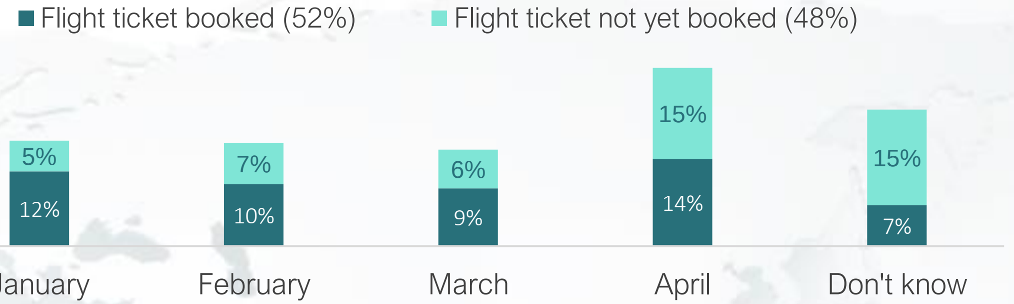
TRAVEL PREFERENCES OF BRAZILIAN RESPONDENTS

Destination: Europe | Travel horizon: January-April 2023

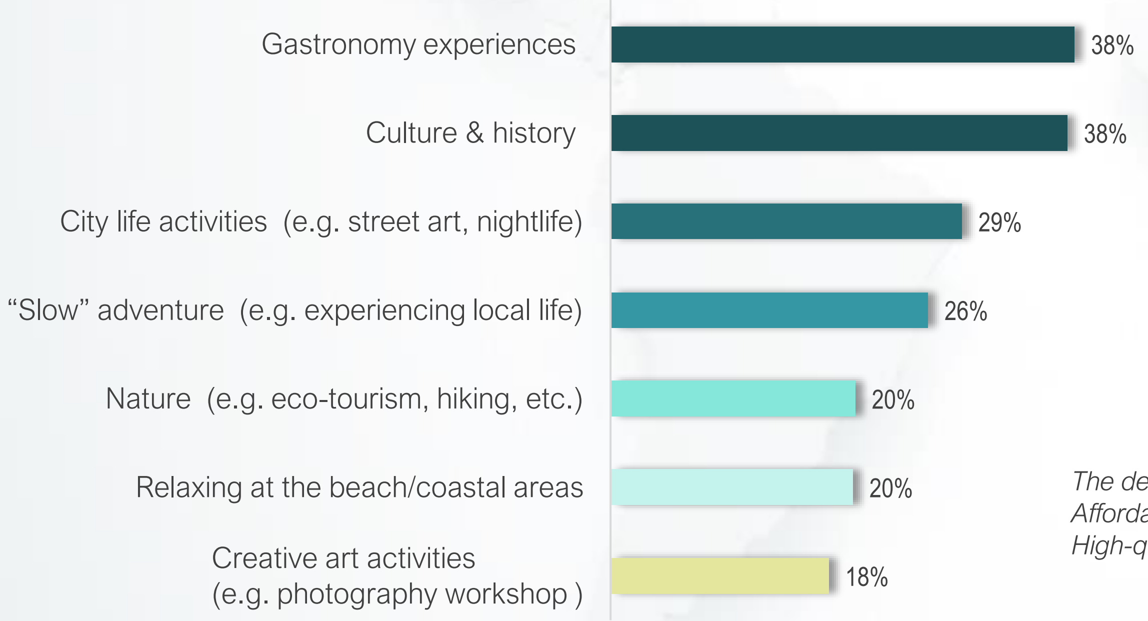
Brazilians remain true to their interests, with the main appeal of travelling within Europe being the opportunity to experience the region's culinary delights and gain a deeper understanding of the culture and history of the places they visit.

More than half (52%) of respondents who intend to visit Europe have already booked their flight tickets, with April coming up as the preferred month.

Intended month of travel and booking status



Most wanted types of activities



Travel companion & preferred destinations

44% of Brazilians plan to travel to Europe with a spouse

28% with a family with small kids (under 18 y.o.)

Destination selection criteria

The destination is safe (34%)
Affordable travel and experiences (33%)
High-quality tourism infrastructure (32%)

High-quality tourism infrastructure (49%)
The destination is safe (41%)
Availability of world-renowned sites (e.g., the Colosseum, 29%).

Top 10

Portugal	42%
France	41%
Italy	32%
Spain	28%
United Kingdom	18%
Germany	15%
Greece	13%
Switzerland	12%
Denmark / Austria	8%
Belgium	7%

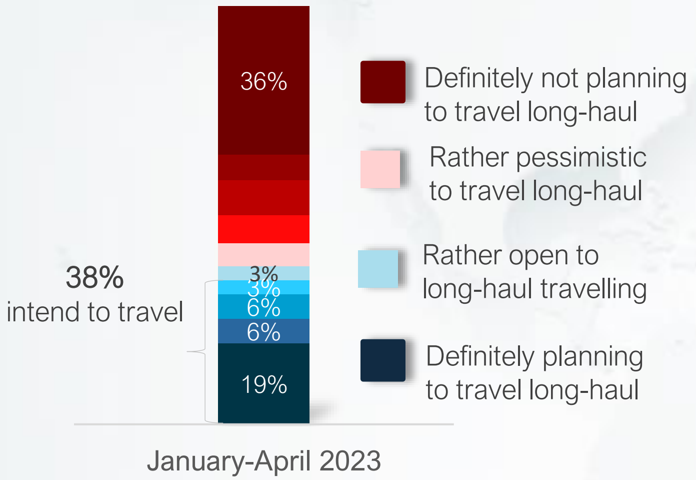
Sample: respondents wishing to visit Europe (n=510)

CANADA: LONG-HAUL TRAVEL INTENTION

Travel horizon: January-April 2023

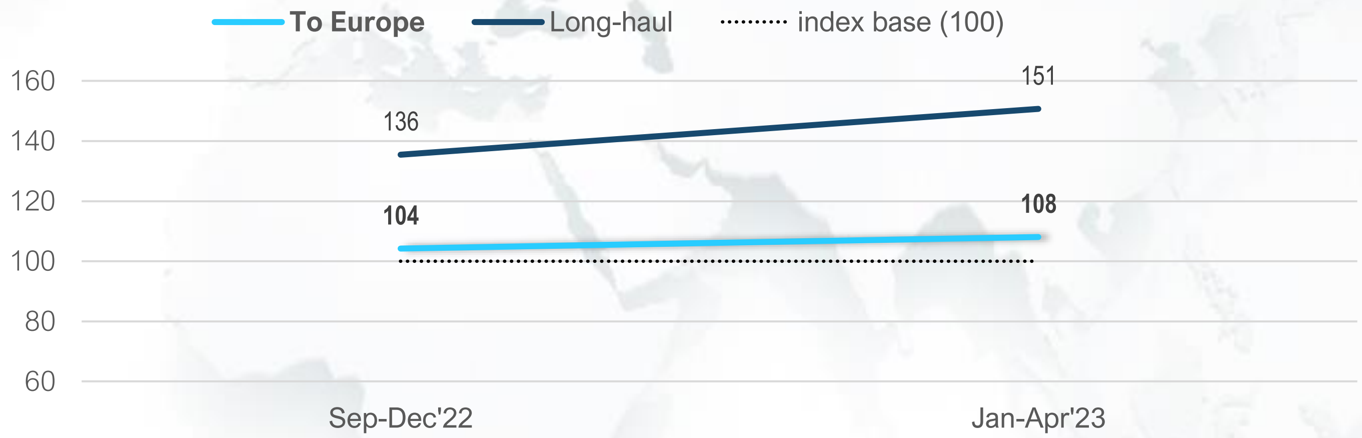
Intention to travel long-haul in the next 4 months

% of respondents (N=1000)



Evolution of intention to travel long-haul and to Europe (4 months horizon)

Index base:100 (>100 = expansion, <100 = decline)[1]



THE CANADIAN TRAVEL SENTIMENT IS POSITIVE, BUT THE EXPECTED RECESSION MAY HAMPER PEOPLE'S PLANS

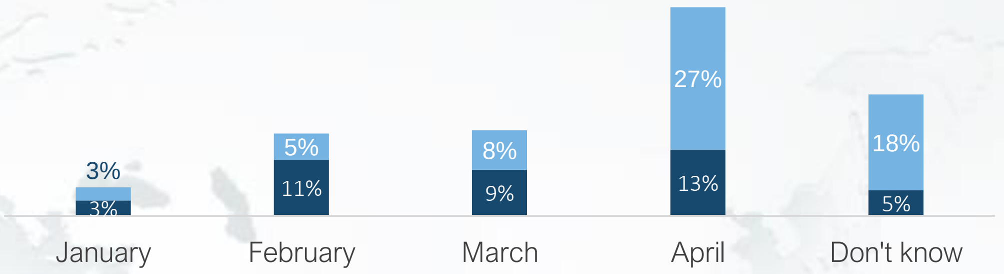
- In Canada, the sentiment index for travelling long-haul (151 pts) and to Europe (108 pts) remains positive. The number of surveyed Canadians planning overseas trips between January-April 2023 (38%) has increased by 16% compared to 2022 (22%). The number of those wishing to visit Europe in the first months of the year has also increased from 15% in 2022 to 29% in 2023. Regardless of this positive trend, it should be noted that 62% of respondents will refrain from travelling outside North America in the short term. The main travel deterrent for 39% of respondents is their disposable budget. Another 29% did not plan to travel during this period.
- The Canadian economy is already showing signs of weakening, and a moderate recession is likely to occur. A decrease in real income, tightening monetary policy, and a potential recession in Europe and the US will lead to a further economic downturn, suppressing consumer confidence. According to Tourism Economics' latest forecasts, in 2023, Canadian outbound travel will reach 73% of its 2019 levels.

TRAVEL PREFERENCES OF CANADIAN RESPONDENTS

Destination: Europe | Travel horizon: January-April 2023

Canadians like to experience the rich history and culture (41%) and the vibrant life of European cities (33%). The chance to try different types of food and wine is also perceived as very attractive, especially among repeat visitors (37% vs 18% for first-time visitors). Furthermore, many Canadians, regardless of age, are also attracted to Europe's beautiful natural scenery. France, Italy and the UK are top-of-mind destinations for the next months.

Intended month of travel and booking status



Most wanted types of activities

Travel companion & preferred destinations

37% of Canadians plan to travel to Europe with a spouse

22% with a family with small kids (under 18 y.o.)

Destination selection criteria

The destination is safe (39%)
High-quality tourism infrastructure (31%)
Affordable travel and experiences (29%)

High-quality tourism infrastructure (37%)
The destination is safe, pleasant weather, and must-see attractions (all 30%)
Affordable travel and experiences (29%)

Top 10	
France	42%
Italy	26%
United Kingdom	20%
Spain /Greece	14%
Germany	12%
Belgium	10%
Portugal /Austria	9%
Croatia	8%
Denmark / Switzerland	7%
Finland /Netherlands / Türkiye	6%

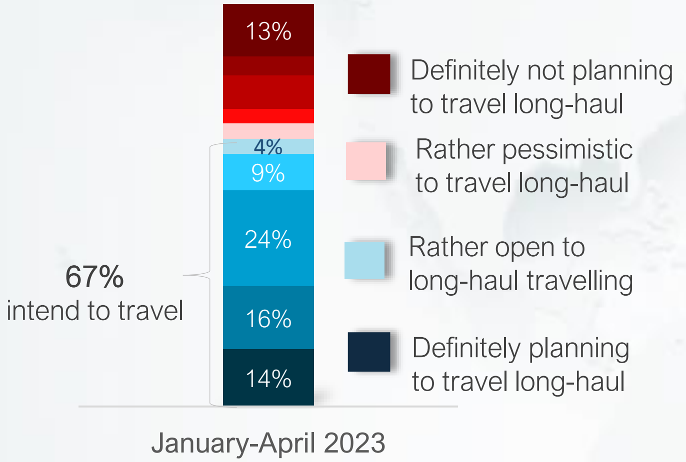
Sample: respondents wishing to visit Europe (n=292)

CHINA: LONG-HAUL TRAVEL INTENTION

Travel horizon: January-April 2023

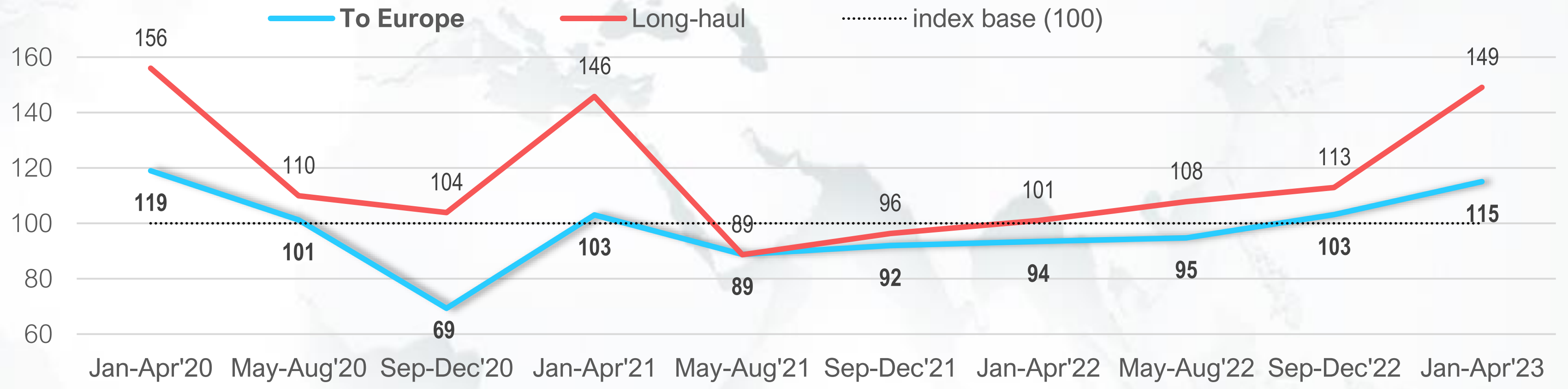
Intention to travel long-haul in the next 4 months

% of respondents (N=1000)



Evolution of intention to travel long-haul and to Europe (4 months horizon)

Index base:100 (>100 = expansion, <100 = decline)[1]



SENTIMENT FOR LONG-HAUL TRAVEL FINALLY PICKS UP IN CHINA FOLLOWING A LONG PERIOD OF STAGNATION

- After 2 difficult years, the announcement of the removal of the zero Covid-19 policy at the beginning of December 2022 has reinstated travel confidence among the Chinese. The survey results clearly reflect the change in the travel mood, with 67% of respondents wishing to visit a destination outside East Asia in the next two months. It is important to note that the survey occurred before China's announcement to reopen its borders in early 2023. As such, it did not grasp the impact of this long-expected news, but the likely result of it would have been a further enhancement of the already positive trend.
- The sentiment index for travelling to Europe between January- April 2023 (115 pts) has shown a spectacular increase of 21 pts compared to the same period in 2022 (94 pts) and reached values close to pre-pandemic times (119 pts in January-April 2020). Of all respondents wishing to travel overseas, 63% have a European destination in mind, with the intention being stronger among 35-49 year old respondents (74%).
- Regardless of the positive news, there remain important barriers to immediate recovery of tourism flows from China, e.g. air connectivity and capacity, the recent re-imposition of some Covid-19 safety measures worldwide, and the remaining health concerns. Experts foresee a slower pace of recovery towards the second half of 2023, a much slower one compared to other markets.[1]

[1] *Tourism Economics: China Re-opening: What happens now?*

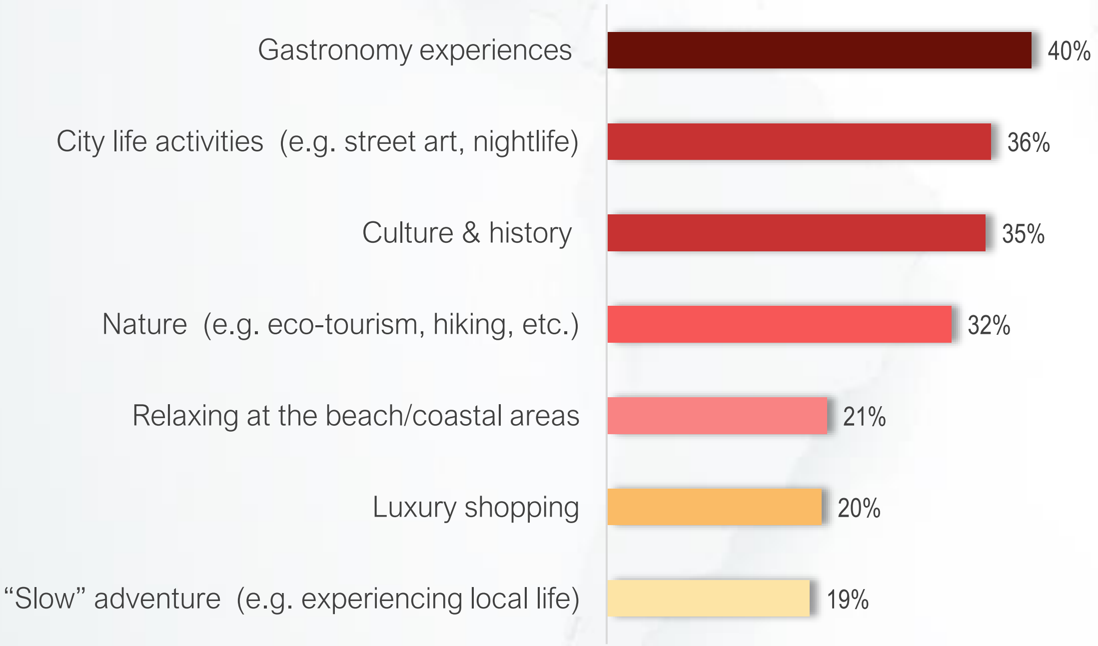
TRAVEL PREFERENCES OF CHINESE RESPONDENTS

Destination: Europe | Travel horizon: January-April 2023

A larger share (59%) of the ready-to-travel Chinese intend to travel with their spouse. With the outbound travel situation not being entirely clear during the data collection period, respondents shared preferences for travelling in March and April rather than in January or February.

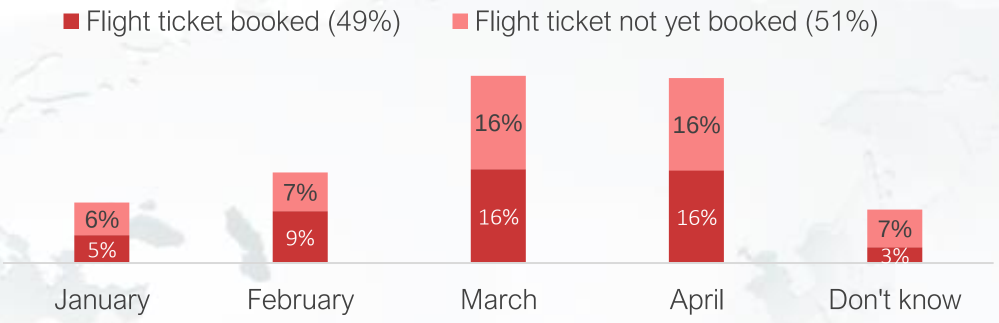
Unlike in other markets, luxury shopping is on the list of the most wanted experiences for the Chinese. Browsing designer products and luxury brands is an especially appealing activity to repeat visitors (22% vs 17% for first-time visitors) and among 35-49 years old travellers (24% vs 17% among other age groups).

Most wanted types of activities



Sample: respondents wishing to visit Europe (n=628)

Intended month of travel and booking status



Travel companion & preferred destinations

59% of Chinese respondents intend to travel to Europe with their spouse.

When looking for a holiday destination, these travellers mainly consider the quality of the tourism infrastructure (40%), the weather conditions (34%) and the perceived safety of the destination (34%). The availability of world-renowned sites (e.g., the Eiffel Tower) is important for 32% of respondents planning to travel in couples.

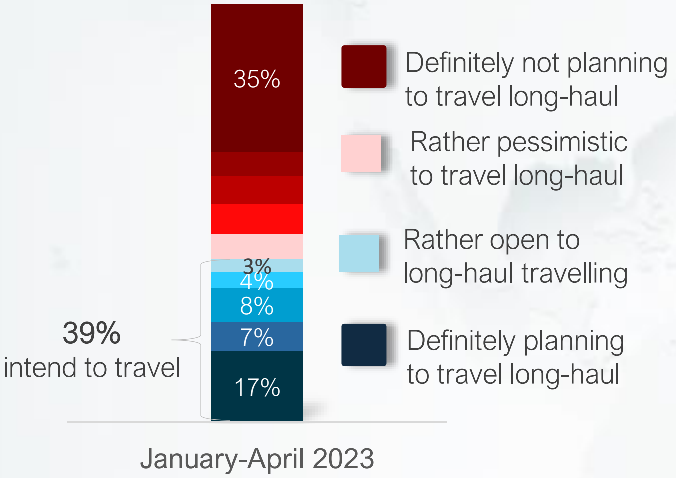
Top 10	
France	48%
Germany	29%
Italy	25%
Denmark	19%
Finland / Austria	16%
United Kingdom	14%
Switzerland	13%
Greece / Netherlands / Türkiye	11%
Belgium	10%

US: LONG-HAUL TRAVEL INTENTION

Travel horizon: January-April 2023

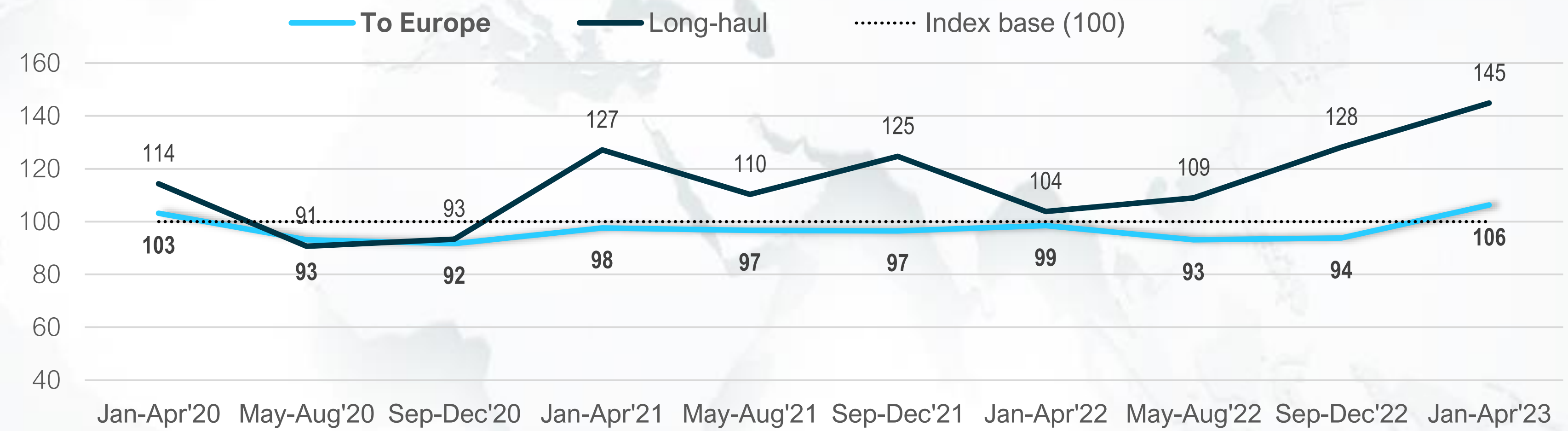
Intention to travel long-haul in the next 4 months

% of respondents (N=1000)



Evolution of intention to travel long-haul and to Europe (4 months horizon)

Index base:100 (>100 = expansion, <100 = decline)[1]



US TRAVEL SENTIMENT IMPROVES STEADILY AT THE BEGINNING OF 2023

- In the United States, nearly 40% of surveyed respondents shared eagerness to travel outside North America by April 2023, with 33% having a European destination in mind. Although this share is not as big as in other markets, it marks a significant change compared to the same period in 2022, when only 28% of Americans planned to travel overseas (and 23% to Europe). The high values of the sentiment index (145 pts for overseas travel, 106 pts for travel to Europe) reflect this positive change and are aligned with the reported increase in consumer confidence at the end of 2022.[1] As could be expected from the challenging economic context, the eagerness to travel is significantly higher among Americans with an annual household income of 75,000 $ or more (55%) compared to other income groups (20%).
- Despite the pandemic and economic challenges, the US market has been the only one where notable dynamics in travel flows to Europe were observed over the past two years. The US remained Europe's number one overseas source market, and experts foresee strong annual growth in arrivals (33,6%) towards 2026.[2]

[1] The conference Board -US Consumer Confidence Bounced Back in December | [2] ETC Quarterly Report 3/2022

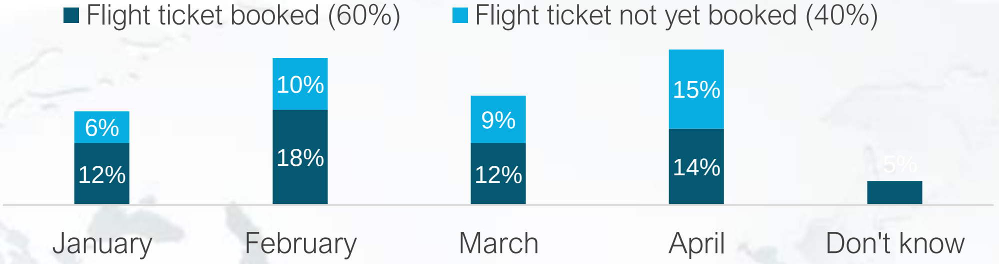
TRAVEL PREFERENCES OF US RESPONDENTS

Destination: Europe | Travel horizon: January-April 2023

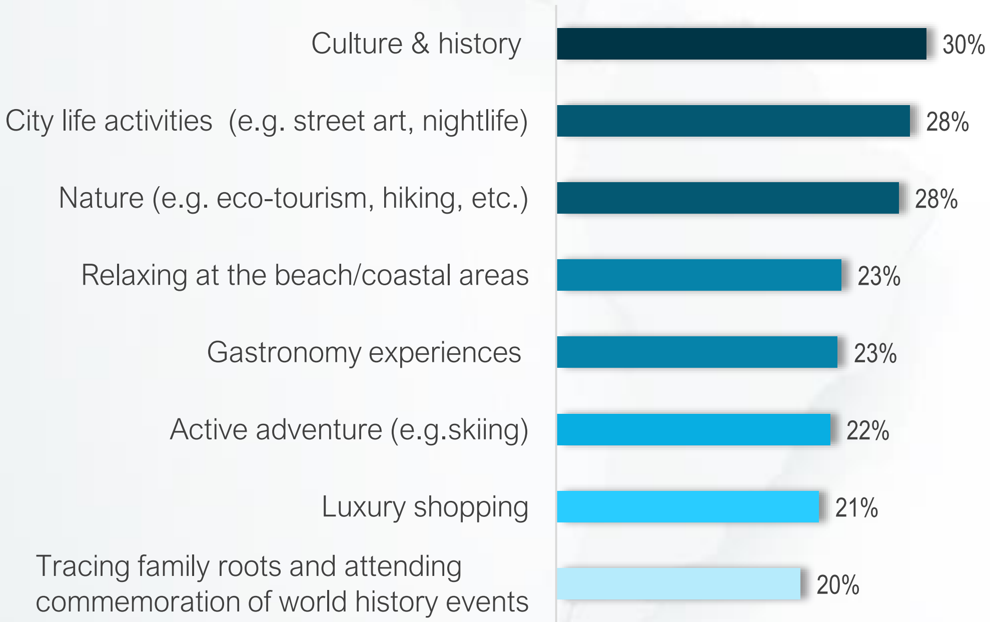
Americans like to visit Europe for many reasons; the rich cultural and historical heritage, including famous landmarks, museums, and art galleries; the vibrant lifestyle in cities and the range of natural landscapes are some of the most decisive pull factors for the following months.

Compared to other surveyed markets, a large share of US respondents (20%) are open to solo travel. When choosing a holiday destination, these travellers check the weather conditions, destinations' infrastructure and prices. It is worth noting that respondents planning solo trips are more attentive and consider the destinations' efforts to preserve the natural and historical heritage.

Intended month of travel and booking status



Most wanted types of activities



Travel companion & preferred destinations

39% of Americans plan to travel to Europe with a spouse

25% with a family with small kids (under 18 y.o.)

20% solo travel

Top 10

France	34%
Italy	26%
United Kingdom	21%
Germany	17%
Spain	15%
Austria	13%
Greece	10%
Ireland / Denmark	7%
Switzerland / Belgium	6%
Netherlands	5%

Destination selection criteria

The destination is safe (39%)
Weather conditions (36%)
High-quality tourism infrastructure (36%)

The destination is safe (44%)
Availability of must-see sites (e.g., the Colosseum, 41%).
High-quality tourism infrastructure (40%)

Weather conditions (32%)
High-quality tourism infrastructure and affordable experiences (both 31%)
The destinations preserve its natural and cultural heritage and fully lifted travel restrictions (both 29%)

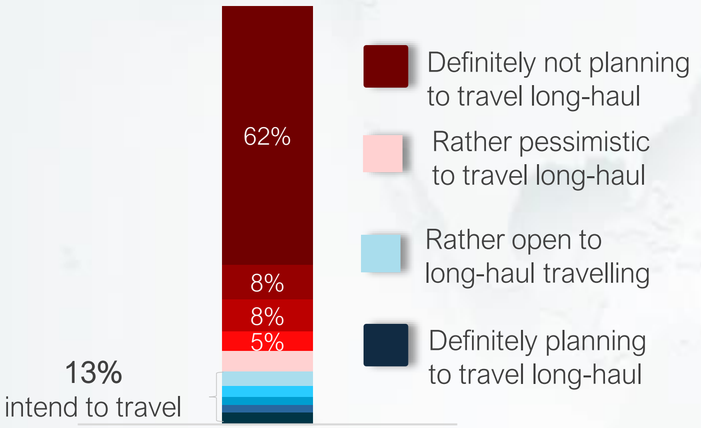
Sample: respondents wishing to visit Europe (n=327)

JAPAN: LONG-HAUL TRAVEL INTENTION

Travel horizon: January-April 2023

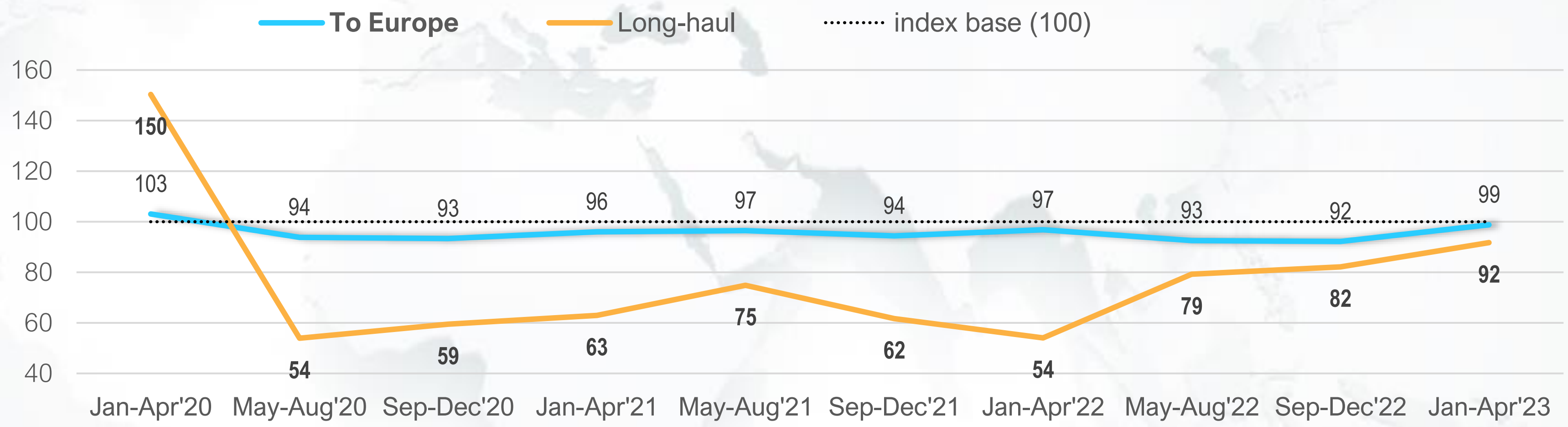
Intention to travel long-haul in the next 4 months

% of respondents (N=1000)



Evolution of intention to travel long-haul and to Europe (4 months horizon)

Index base:100 (>100 = expansion, <100 = decline)[1]



NO IMPROVEMENT OF THE TRAVEL SENTIMENT IN JAPAN AT THE BEGINNING OF 2023

- Although the sentiment index in Japan has improved for both long-haul travel and travel to Europe compared to a year ago (+38 pts and +2 pts, respectively), the values remain negative, and the travel intention is weak. Only 13% of all surveyed Japanese intend to travel outside East Asia in the first four months of 2023. When asked about their main reason not to travel long-haul, nearly half of the respondents (49%) said they did not plan to travel, and another 20% mentioned concerns about travelling during the Covid-19 pandemic. When asked about factors that could encourage them to travel overseas, however, 43% referred to the improvement of personal finances, which suggests that the economic challenges may also be among the main deterrents to Japanese travellers.
- On the positive side, with pandemic restrictions lifted in Japan, nearby destinations and other world regions, outbound travel from the market may improve in 2023. Forecasts suggest that the outbound travel flows will return to their 2019 levels by 2026, while in 2023, these will reach 40% of 2019 levels (26 mn total outbound travel).[1]

[1] *Japan Outbound Travel, Tourism Economics (Dec. 2022)*

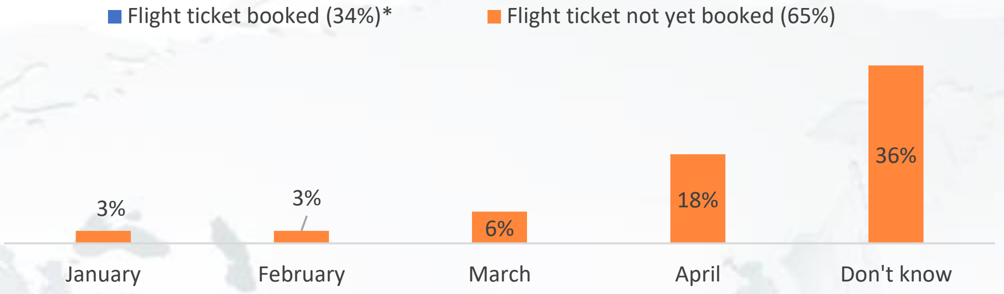
TRAVEL PREFERENCES OF JAPANESE RESPONDENTS

Destination: Europe | Travel horizon: January-April 2023

Most wanted types of activities

Please note that the graphs are based on a very small sample size n=92 . As such, they are not representative of the Japanese travel market and should not be used as indicative of the trends in this market.

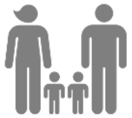
Intended month of travel and booking status



**Monthly percentage split is not available due to the small sample of respondents*

Travel companion & preferred destinations

39% of Japanese plan to travel to Europe with a spouse



20% with a family with small kids (under 18 y.o.)

Information about destination selection criteria per travel group is not available due to the small sample size

Top 10	
France	27%
Germany	19%
United Kingdom	16%
Italy	14%
Austria	13%
Greece / Spain	8%
Belgium /Switzerland	5%
Netherlands	4%
Bulgaria /Portugal/ Sweden	3%

Sample: respondents wishing to visit Europe (n=92). The small sample size limits the accuracy of the outcomes. The analysis is left in this for monitoring-over-time purposes.

LONG-HAUL TRAVEL BAROMETER

JOIN THE PROJECT!

The primary goal of the project is to anticipate short-term travel intentions in long-haul markets that are key for the European tourism industry.

This initiative offers interested partners the opportunity to investigate in detail the motivations and barriers to travel in long-haul source markets and ask specific questions relevant to the present context.

Contact us if you are interested to learn more about the project and the cooperation opportunities.

Co-funded by the European Union