EUROPEAN TOURISM TRENDS

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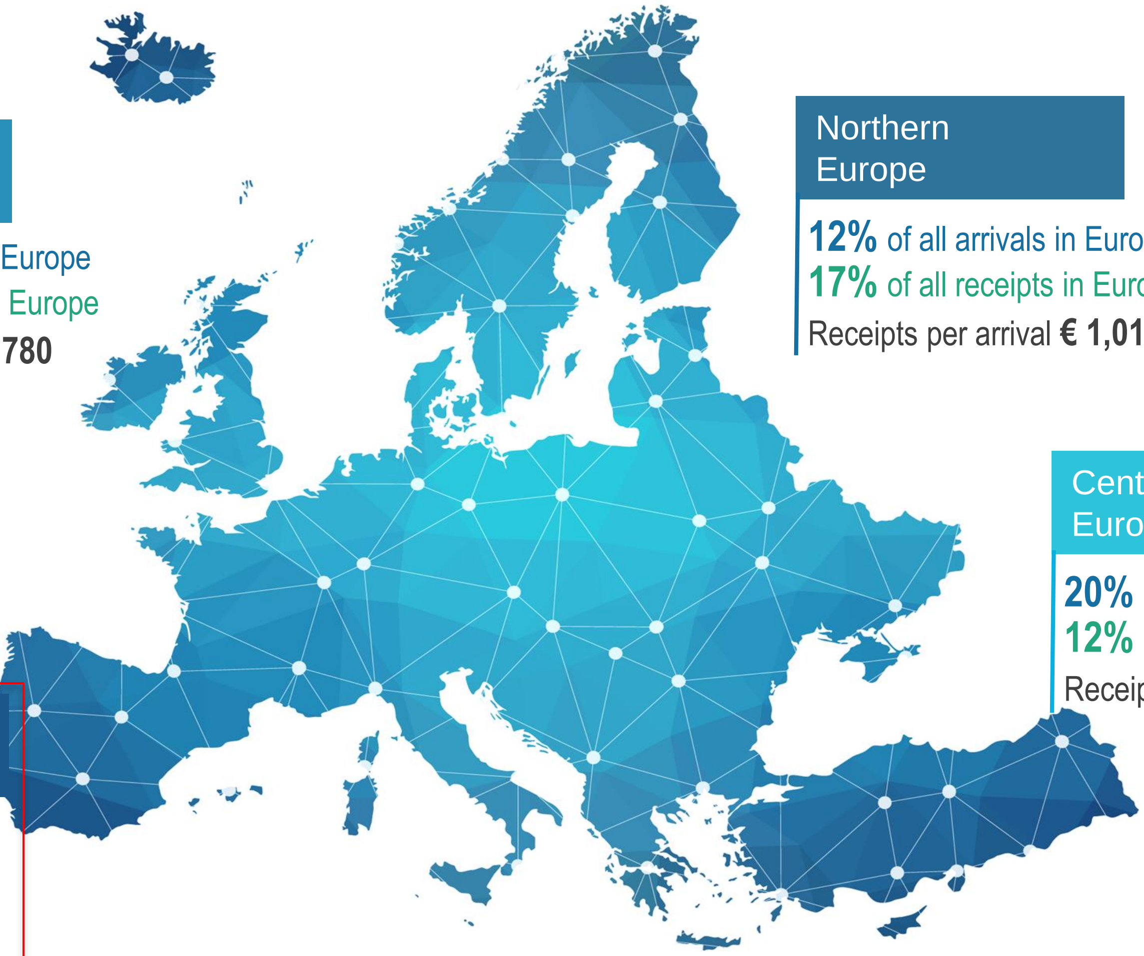
EUROPEAN TRAVEL COMMISSION

REGIONAL TOURISM TRENDS 2018



Western Europe

29% of all arrivals in Europe
33% of all receipts in Europe
Receipts per arrival **€ 780**

Northern Europe

12% of all arrivals in Europe
17% of all receipts in Europe
Receipts per arrival **€ 1,010**

Central- Eastern Europe

20% of all arrivals in Europe
12% of all receipts in Europe
Receipts per arrival **€ 410**

Southern/Mediterranean Europe

40% of all arrivals in Europe
39% of all receipts in Europe
Receipts per arrival **€640**

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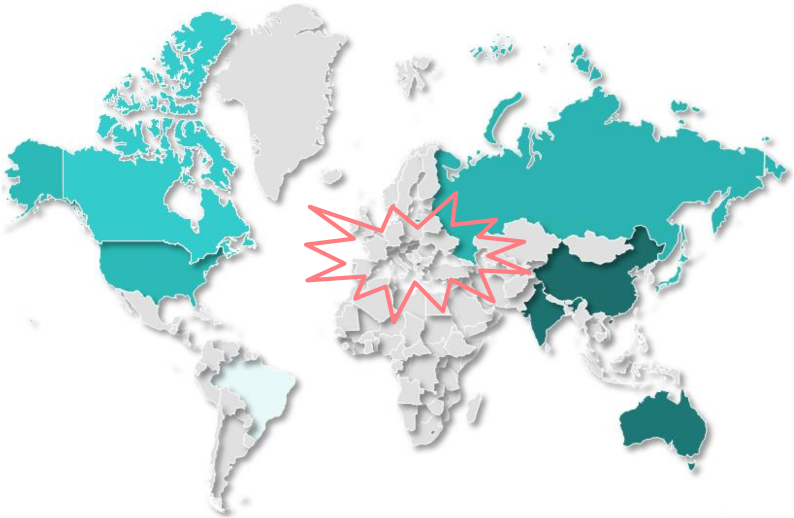
Source: UNWTO 2019

GROWTH POTENTIAL FROM LONG-HAUL SOURCE MARKETS

Arrivals from overseas market to SM Europe 2018 (millions)

1. RUSSIA **10 mn**
2. US **9.6 mn**
3. CANADA **2.9 mn**
4. BRAZIL **2.2 mn**
5. AU **2.1 mn**
6. JAPAN **1.3 mn**
7. CHINA **1.1 mn**
8. INDIA **0.3 mn**

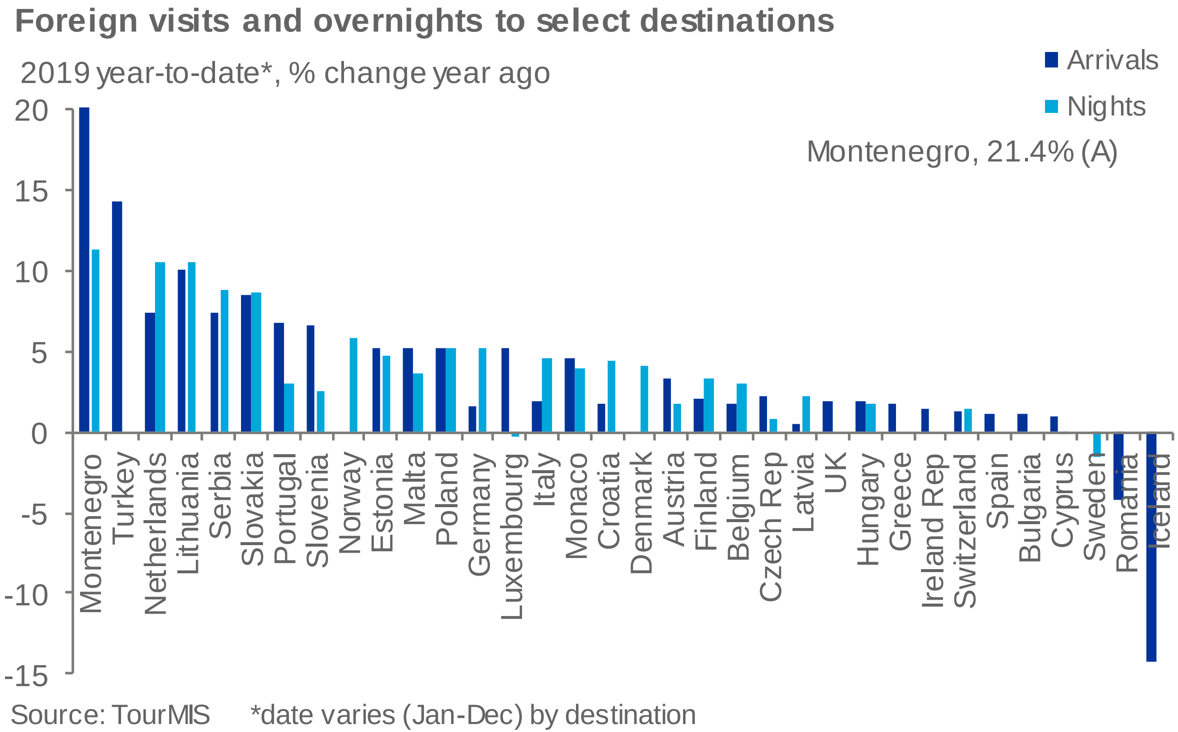
Annual average growth of arrivals to SM Europe 2018-2023 (%)



1. CHINA **8%**
2. INDIA **7%**
3. AUSTRALIA **7%**
4. RUSSIA **5%**
5. US **4%**
6. JAPAN **4%**
7. CANADA **2%**
8. BRAZIL **1%**

Source: ETC Quarterly Report Q3/2019

GROWTH CONTINUED IN 2019 TO MOST DESTINATIONS



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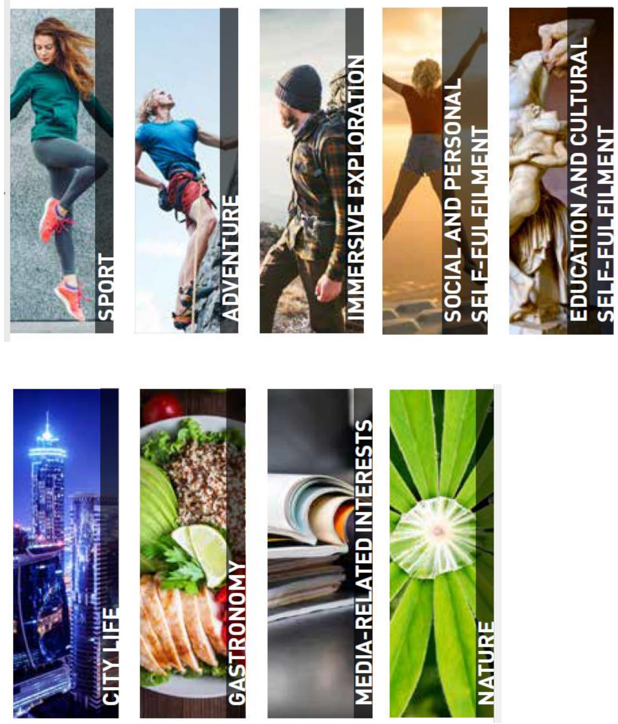
Source: ETC Quarterly Report Q4/2019

Mapping of passion groups



The tourism passion communities are groups of people that travel with the primary idea of pursuing a special interest, including a hobby, an activity or a motivation.

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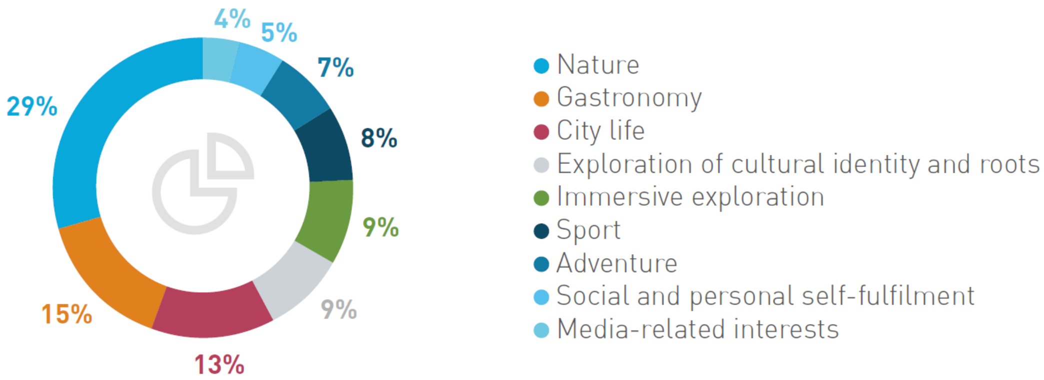
Share (%) of Travellers Interested in Each Passion

Primary interest to travel (share of respondents)



NATURE IS THE LARGEST INTEREST DRIVING PEOPLE'S TRAVEL DECISIONS

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Themes Under Examination

City Life

Gastronomy

Immersive Exploration

Exploration of Cultural Identity and Roots

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IMMERSIVE EXPLORERS

Specific areas of interest

48%	Living unique experiences
48%	Simple life
48%	Experiencing local life
47%	Enjoying a slower pace of life
40%	Road trips
37%	Train travel
30%	Low-cost travel (e.g. back-packing)
20%	Cyclo-tourism
1%	Other

Travel-related activities undertaken by this group are characterised by a slower pace of events, reflecting a mindset towards learning about a specific interest (or destination) in depth, rather than exploring many of them superficially. Experiences include taking a different perspective on mundane activities such as choosing alternative means of travel, but also considering a different viewpoint from the 'mainstream' tourist.

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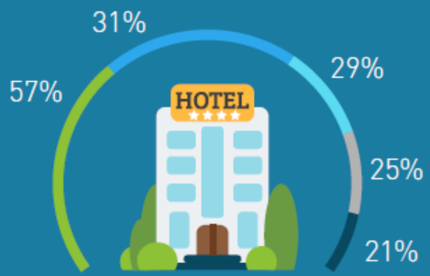
IMMERSIVE EXPLORERS LIKE SPENDING MORE THAN A WEEK IN THE DESTINATION THEY VISIT AND HIGHLY VALUE THE FEEL OF SAFETY

PREFERRED MONTHS TO TRAVEL

May (21%)
June (21%)
July (18%)

CHOICE OF ACCOMMODATION



- Middle-class hotel
- Rented property
- Guest house/B&B/Hostel
- Camping
- Luxury hotel

PREFFERED TRAVEL PARTNER

Spouse/partner **55%**
Family **48%**
Friend(s) **30%**

AVERAGE LENGTH OF STAY

3-7 nights	8-14 nights	15-21 nights
17%	**57%**	**17%**

FACTORS INFLUENCING THE CHOICE OF DESTINATION

61% Concerns about personal safety
59% Cost of travel
47% Destination's cost of living
37% Bureaucracy (e.g. difficulties in obtaining a visa)
34% Pollution

THE AVERAGE DAILY BUDGET
per person is **€157**

Saudi Arabians and **Australians allocate significantly higher amounts** - €540 and €210, respectively.

Multiple-answer questions

SEEKERS OF SLOW ADVENTURES ARE "INTERNAUTS". MORE THAN 1 IN 2 USES INTERNET OVER OTHER ALTERNATIVE SOURCES TO RESEARCH AND PLAN THE VARIOUS ASPECTS OF THEIR NEXT TRIP

SOURCES USED FOR TRAVEL PLANNING

67% Internet

32% Friends & relatives

20% Travel magazines

The most popular online sources are **travel review websites** (e.g. Trip Advisor), **travel booking websites** and **social media.**

THE TOP SOCIAL-MEDIA CHANNELS ARE

Facebook 69%

Instagram 47%

YouTube 46%

MOST POPULAR CHANNELS FOR BOOKING

FLIGHTS

Book via online platforms (e.g. Skyscanner) 60%

Book directly with the airline 64%

Book an entire travel package through a travel agent 58%

ACCOMMODATION

Book directly with the accommodation provider 47%

Book via online platforms (e.g. booking.com) 58%

Book via a travel agent 43%

Multiple-answer questions

THANK YOU FOR YOUR ATTENTION!