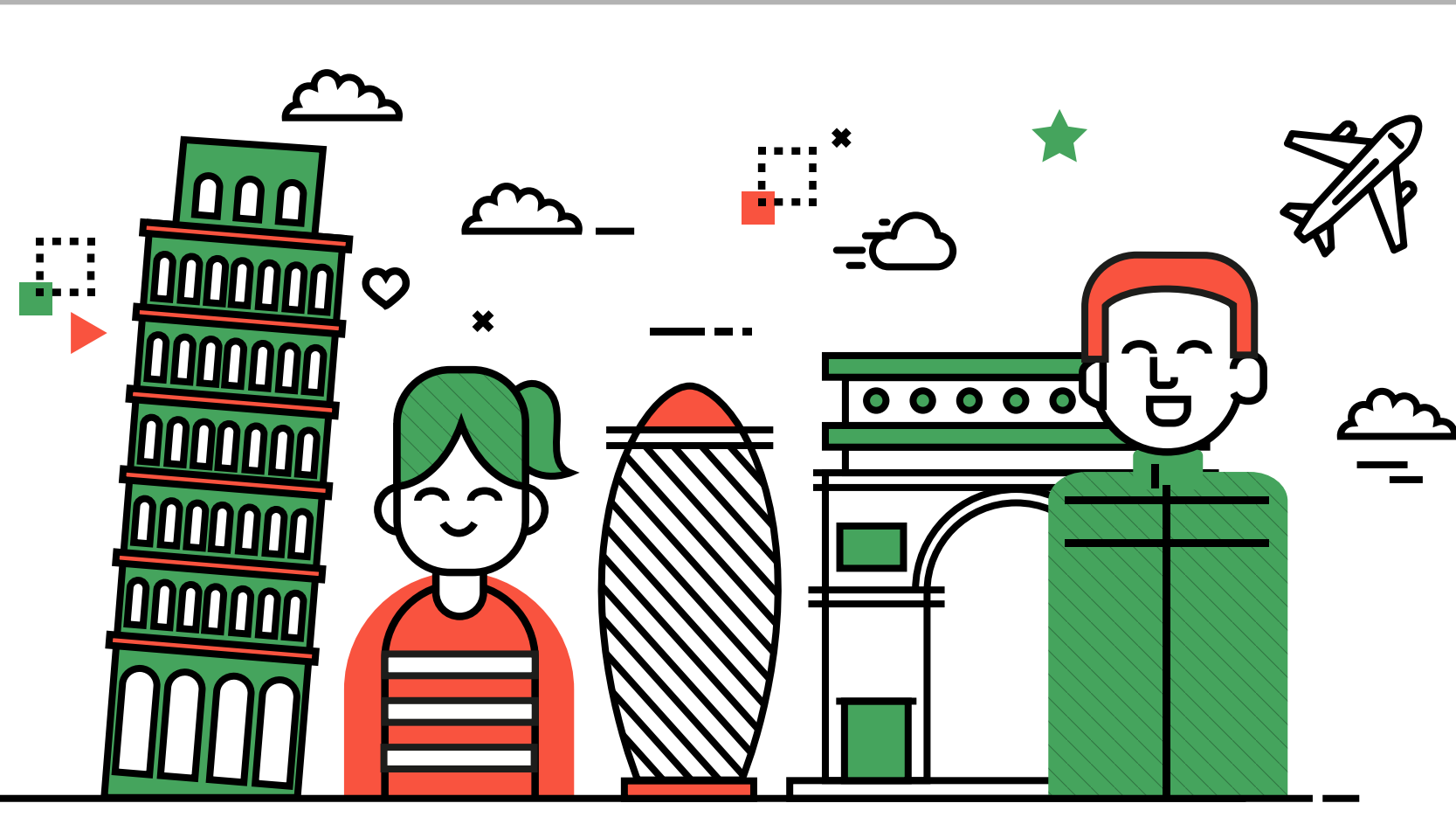


DESTINATION EUROPE

Long-Haul Travel Barometer



Edition 4/2016

European tourism destinations excel in serving customers from different age groups, however, over the past few years, shifts in the generational balance have become apparent. The leading role of the "Baby Boomer" generation has been smoothly shifting to the millennial generation, which is expected to become the largest travel group to be served.¹

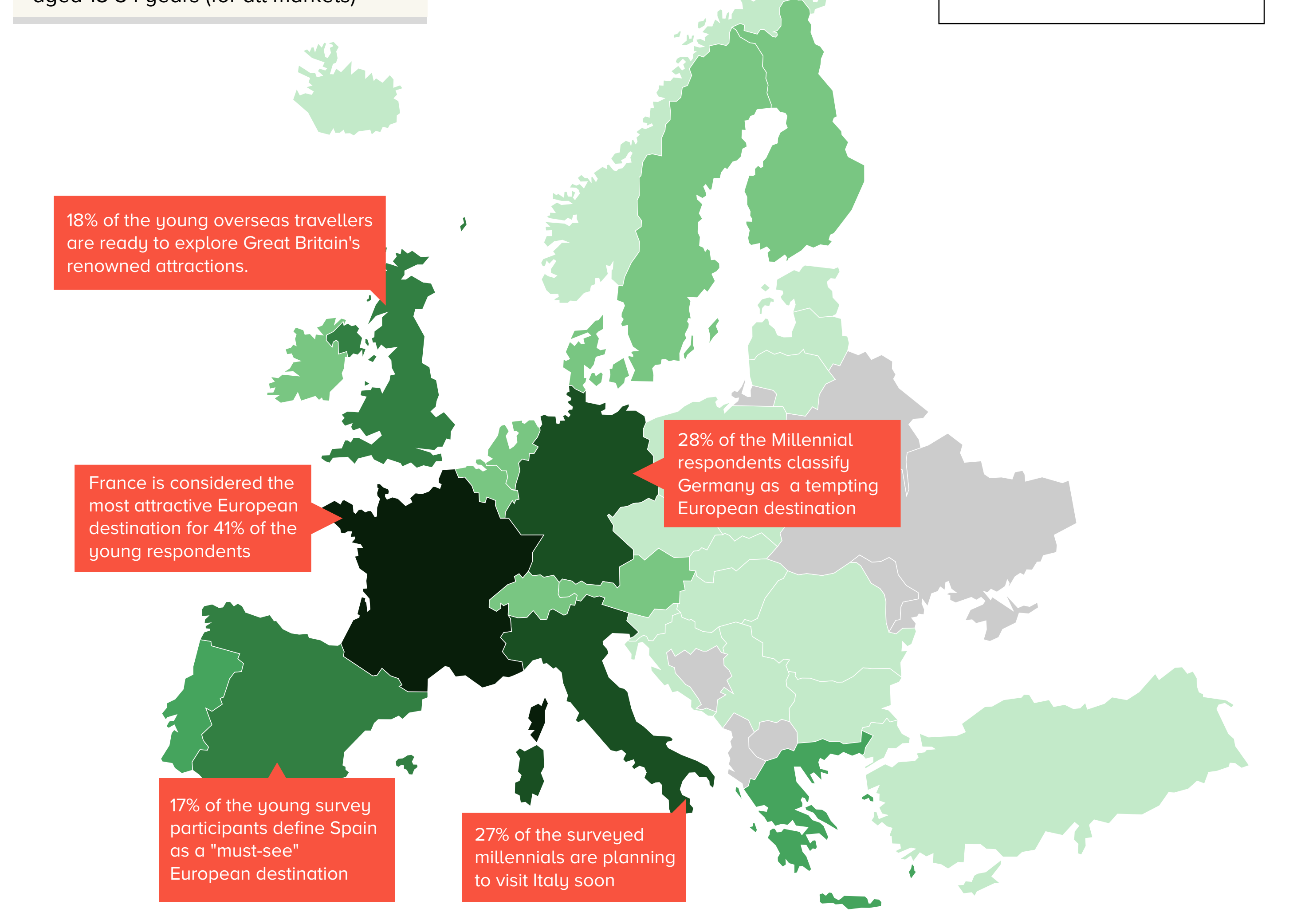
Travel Barometer indicate that across generations, the millennial travellers² from the highest-volume overseas markets demonstrate the strongest intention to visit Europe in the future. Survey data reveals that well-known European destinations are at the top of the list for the younger travellers. Simultaneously, Europe's natural environment is seen as the most appealing pull factor for the members of this age group.

Exploring the travel preferences of the young from long-haul travel markets is therefore essential to the future success of the European tourism sector. Previous results from the Long-Haul

¹ Benckendorff, P., Moscardo, G., & Pendergast, D. (2010). Tourism and generation Y. Cambridge, MA: CAB International.
² This survey considers Millennials as all respondents born between 1982 and 2002 (i.e. aged 18-34 years as of 2015) as according to Howe, N., & Strauss, W. (2000). Millennials Rising: The Next Great Generation. New York: Vintage Books.

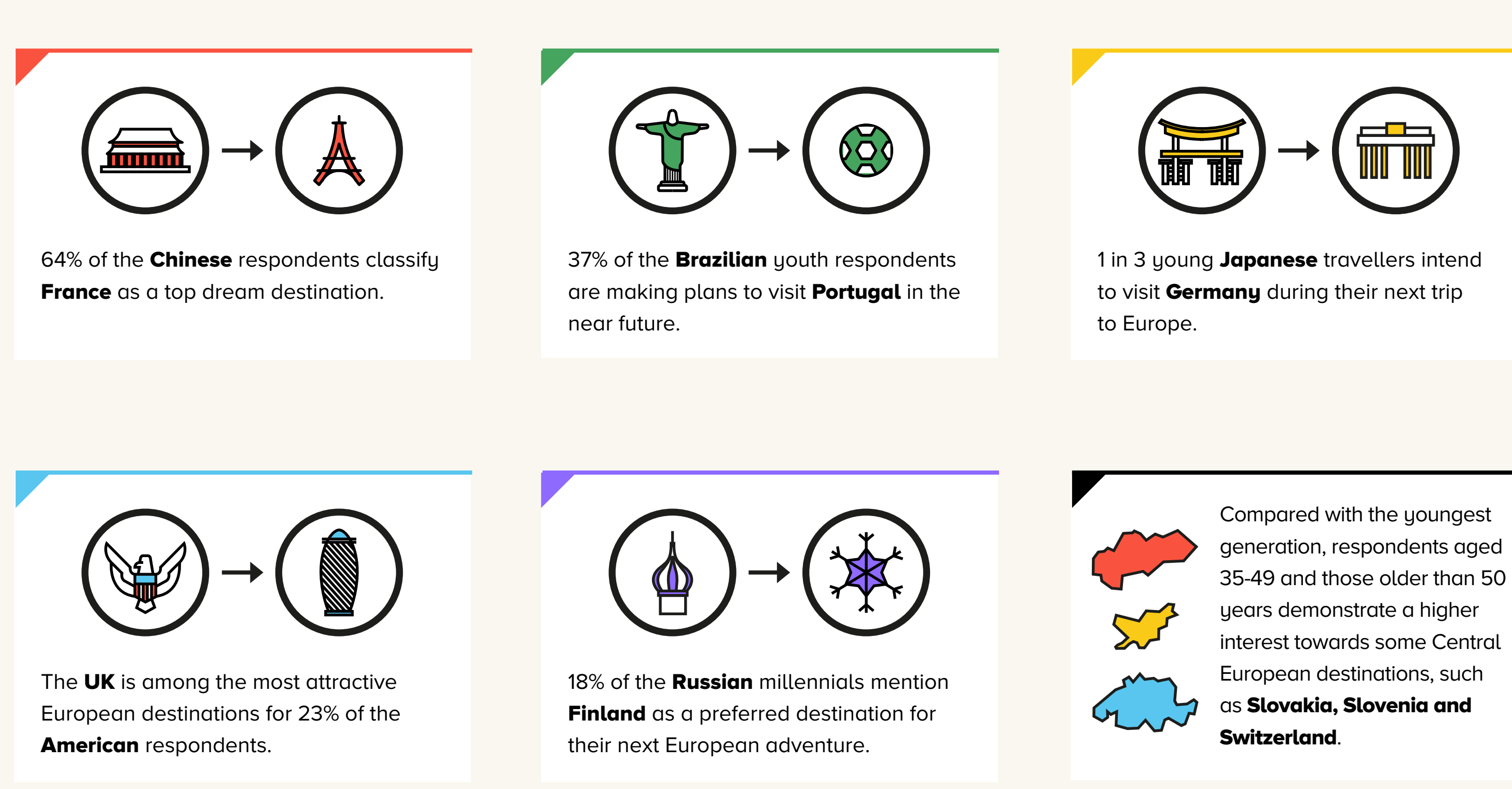
MILLENNIALS' TRAVEL MAP DOMINATED BY EUROPE'S POPULAR TOURISM DESTINATIONS

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

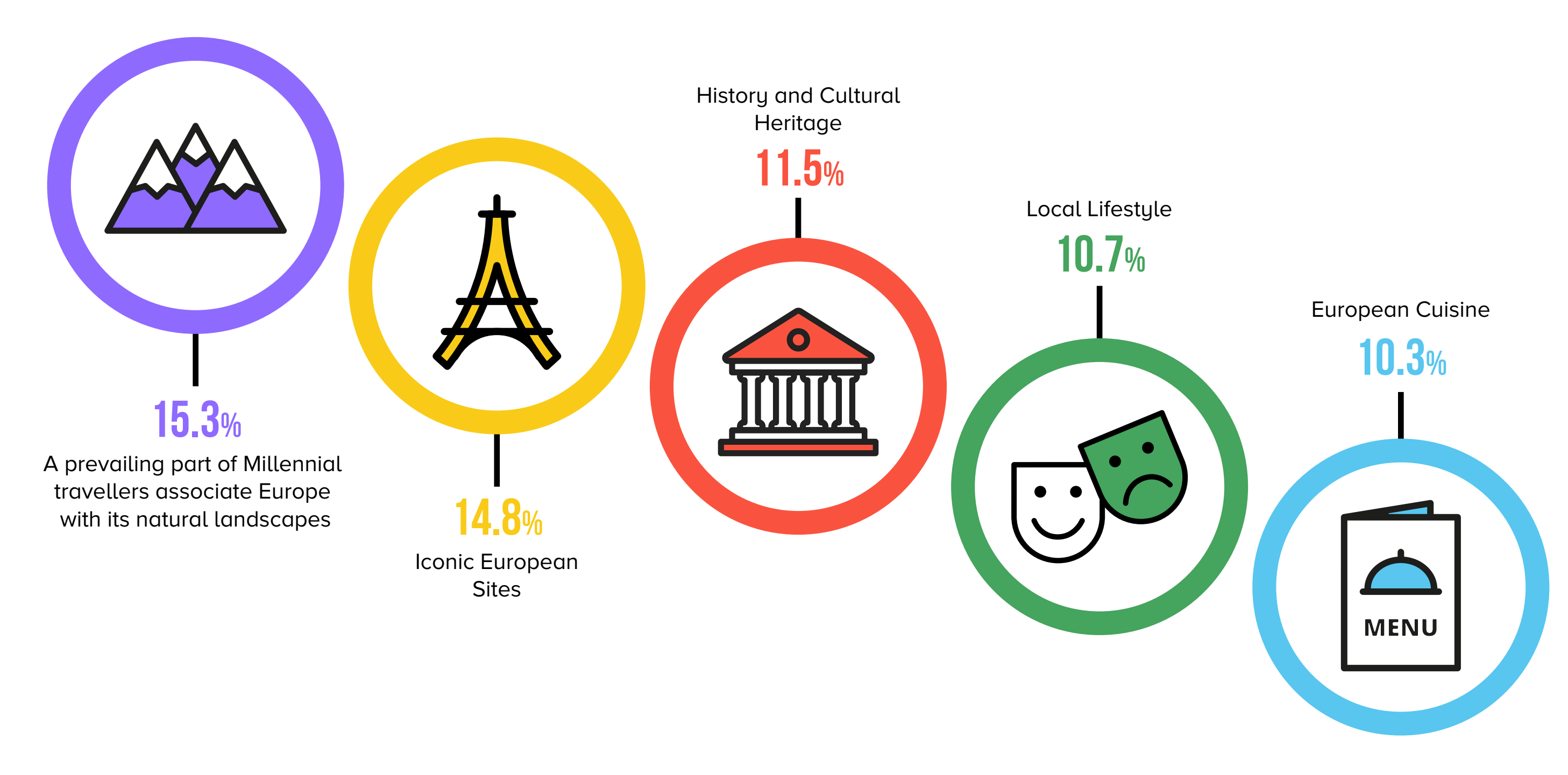


9% of young respondents have no clear destination preferences. These potential travellers are early in their travel careers waiting to be enticed to Europe's plethora of destinations and attractions beyond the mainstream.

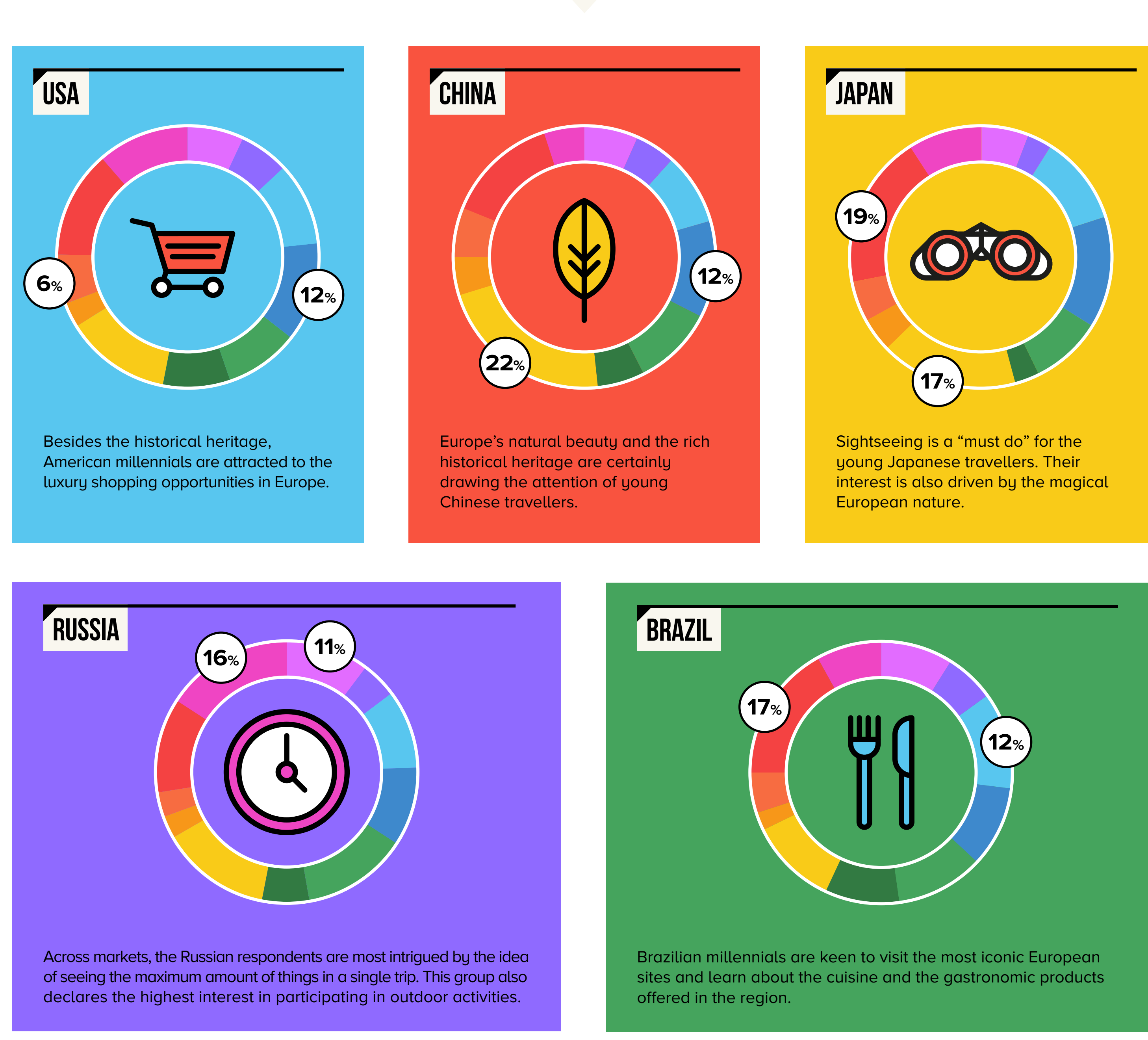
MILLENNIALS' DESTINATION CHOICE DRIVEN BY CULTURAL AFFILIATION, GEOGRAPHICAL PROXIMITY AND UNEXPLORED OPPORTUNITIES



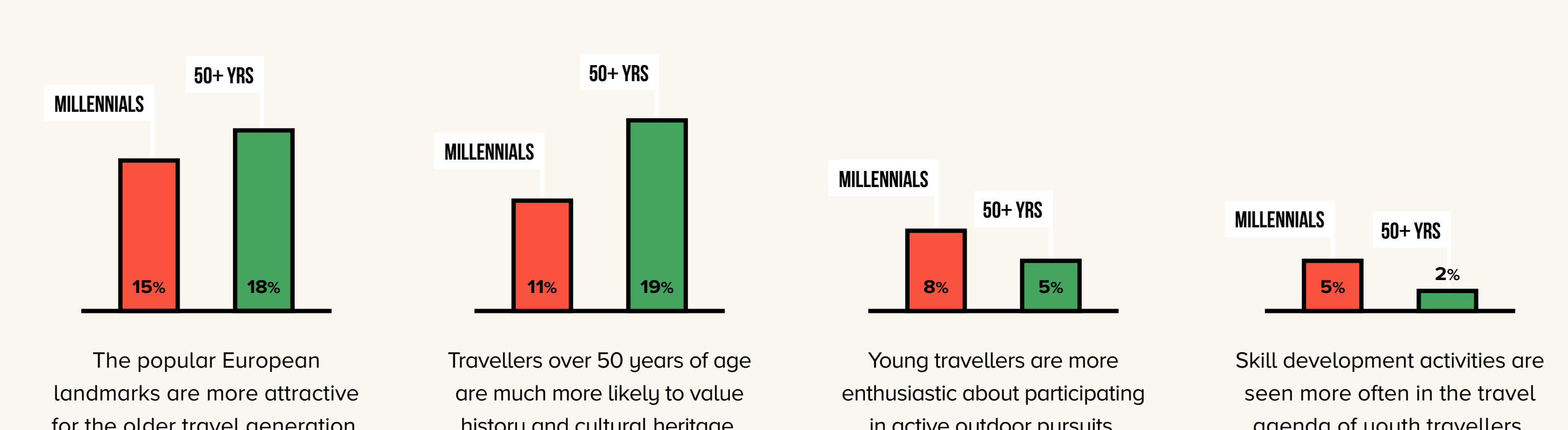
EUROPE'S NATURAL BEAUTY DOMINATES MILLENNIALS' IMAGE OF THE DESTINATION



POPULAR TRAVEL EXPERIENCES IN EUROPE



ACTIVE AND ENRICHING EXPERIENCES WILL ATTRACT THE YOUNGER GENERATION



Note: Data featured is an aggregate of data collected in 2015.
 This survey considers Millennials as all respondents born between 1982 and 2002 (i.e. aged 18-34 years as of 2015) as according to Howe, N., & Strauss, W. (2000). Millennials Rising: The Next Great Generation. New York: Vintage Books.

The Long-Haul Travel Sentiment Survey & Index captures people's intention to travel abroad, their motivations and barriers to travel, as well as key characteristics of their trip. It monitors travel sentiment in five key extra-European markets: Brazil, China, Japan, the Russian Federation and the USA. The survey is not meant to quantify prospect demand levels.

More information: www.etc-corporate.org