

DESTINATION EUROPE

Long-Haul Travel Barometer

Edition 6/2016



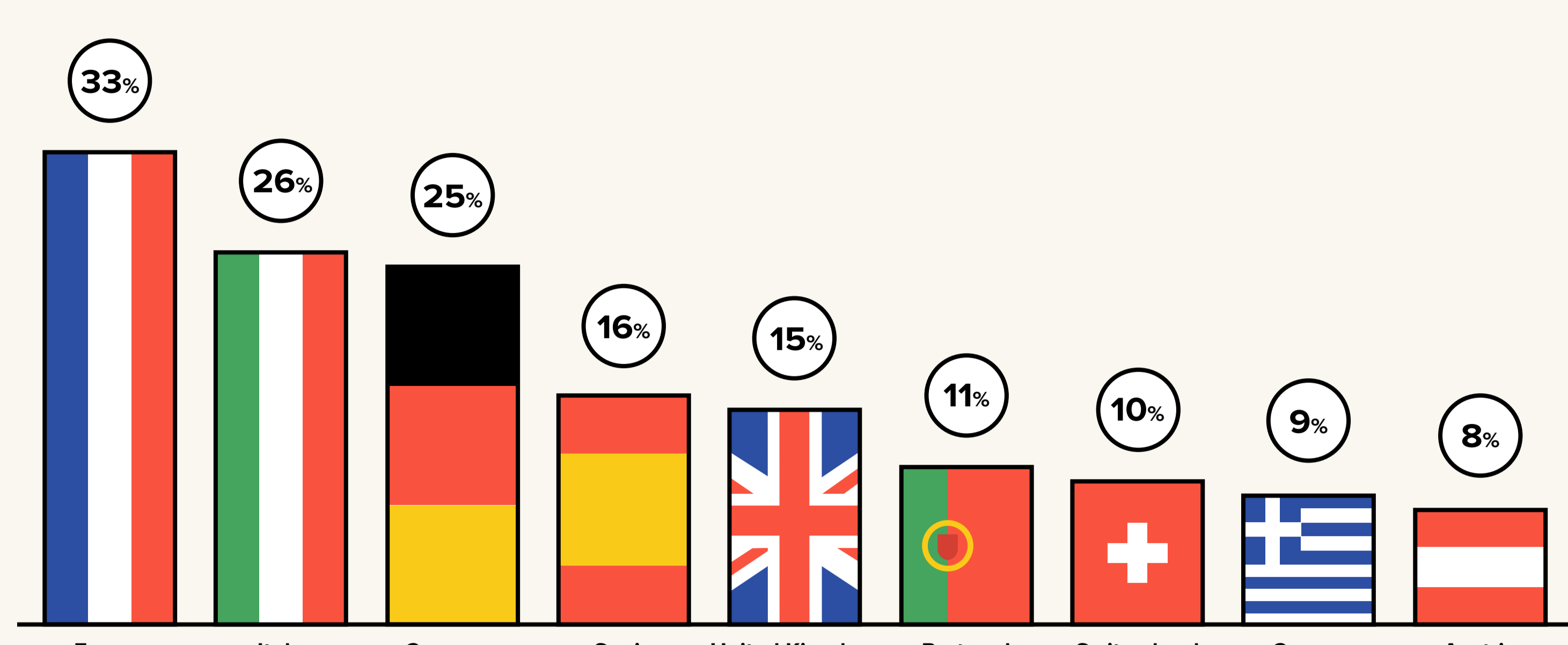
The importance of the senior travel segment has been widely recognised over the last decade, as the Baby Boomer generation move into older age bands. The increasing disposable income of this market segment, and the time available for travel during and outside peak seasons categorises this group of travellers as a highly valuable one. Exploring the travel preferences and motivations of senior travellers is therefore, essential for the future prosperity of the European tourism sector.

from Europe's highest volume overseas markets. Yet, results point out that respondents are also keener to discover off the beaten track destinations than a year ago. Moreover, this Travel Barometer reveals that in 2016, older travellers from long-haul markets are more excited about learning something new about the European history, cultural heritage, and enjoying the picturesque nature during their next visit.

This issue of the Travel Barometer indicates that in 2016, popular European destinations remain the first choice of senior travellers

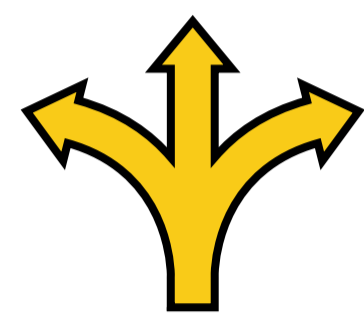
*This infographic considers Seniors as all individuals born before 1966 (i.e. aged 50+ years as of 2016) and who took part in the Long-haul Travel Sentiment Survey & Index.

SENIORS FROM LONG-HAUL MARKETS ATTRACTED TO EUROPE'S RENOWNED DESTINATIONS



France is seen as most attractive European destination among all* senior travellers in both 2015 and 2016. On average, one in three respondents (33%) has in mind France when thinking of a trip to Europe.

*Total sample size N=2890 (Brazil=606, China=584, Japan=400, Russia=595 USA=705)



Survey data reveals that on average, about 10% of all senior respondents have not yet decided on their desired European destination.

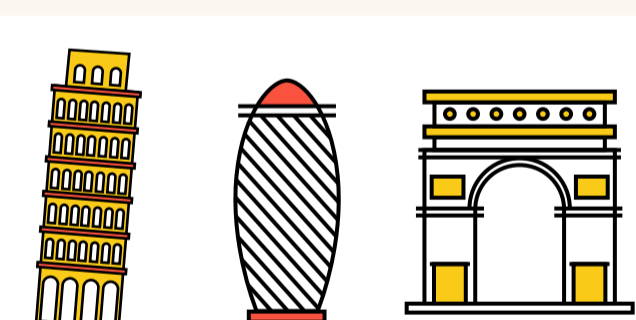
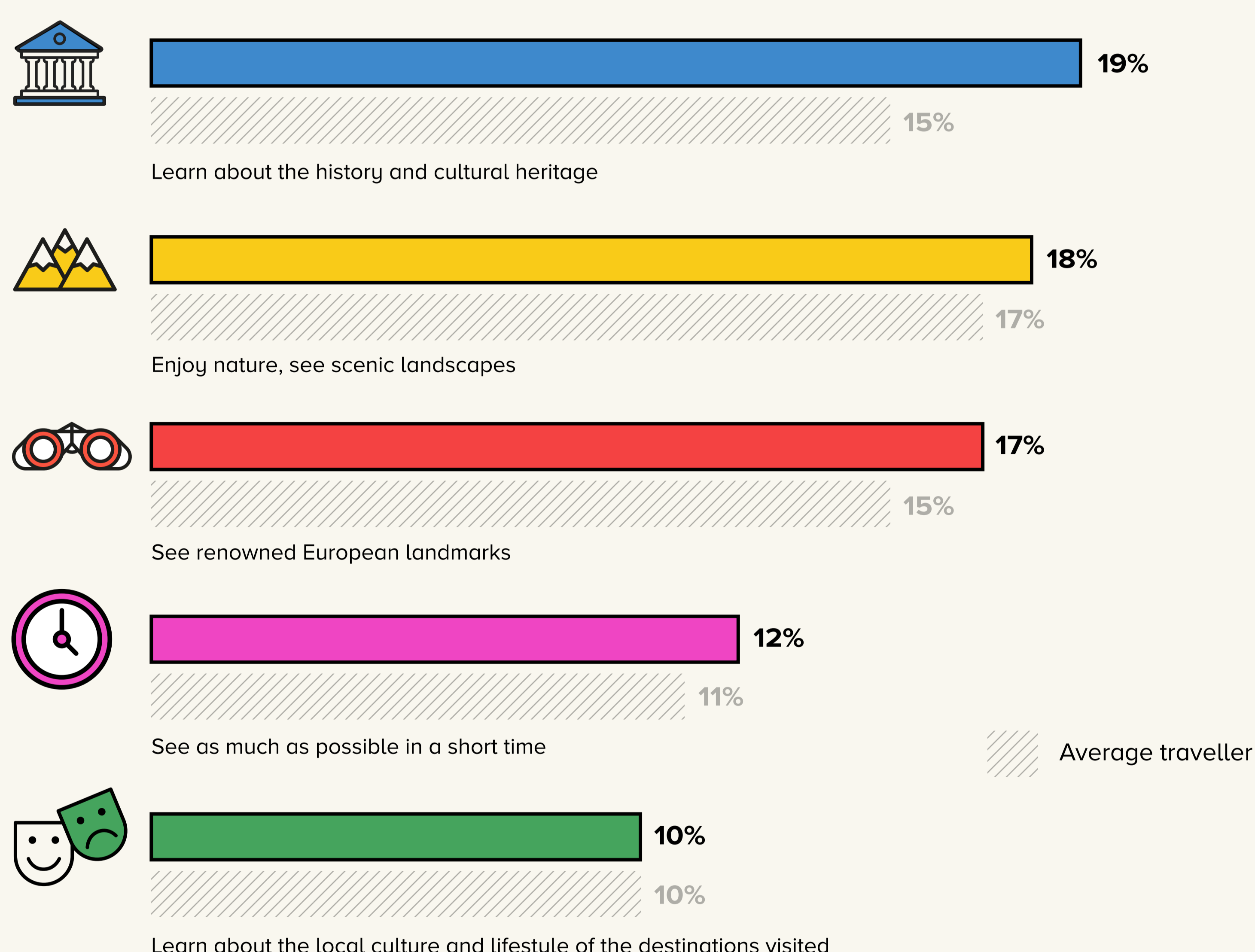
SENIORS' INTEREST IN EUROPEAN DESTINATIONS CONTINUES ITS GROWTH IN 2016



Total sample size (N=2890)

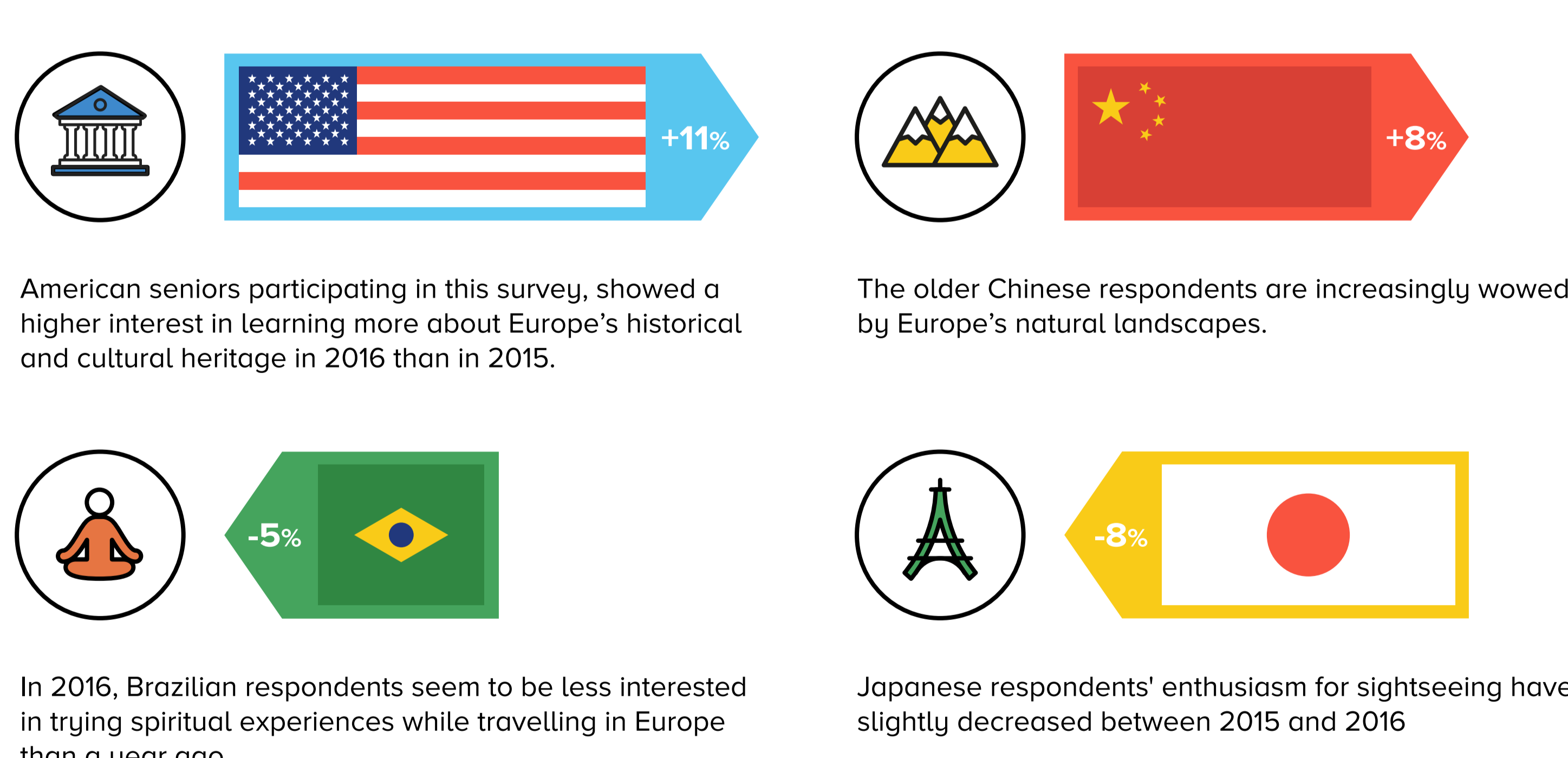
EUROPEAN HISTORY, CULTURAL HERITAGE AND NATURAL LANDSCAPES ARE THE TOP PRIORITIES FOR SENIOR TRAVELLERS

19% of all seniors, consider Europe's history and cultural heritage as a top reason to visit the region in future

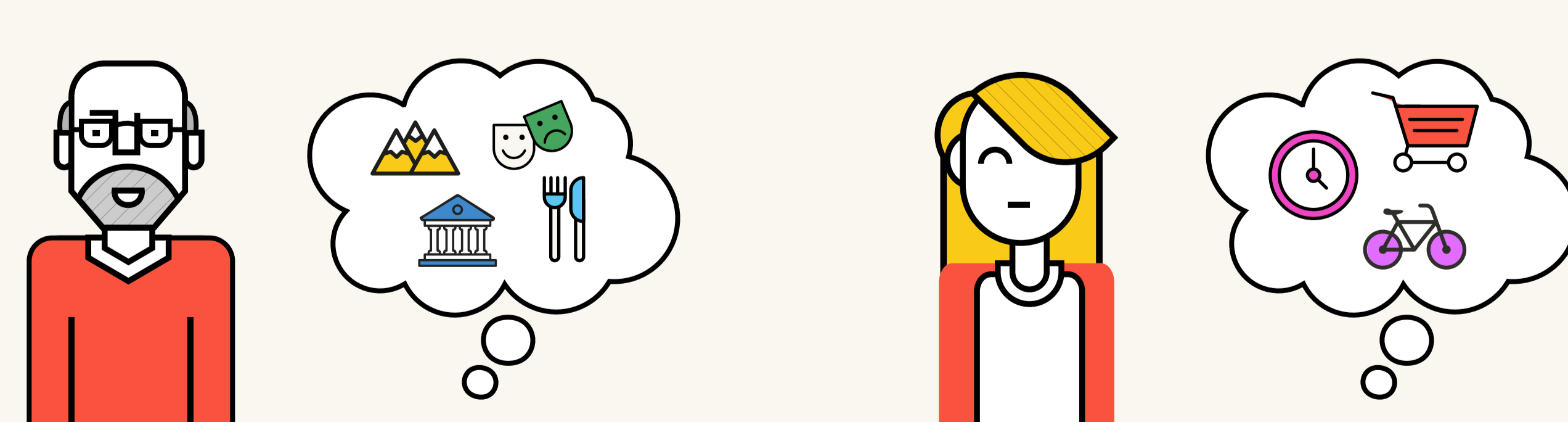


Famous European landmarks are considered a top pull-factor to attract long-haul travellers to the region. However, this trend began to decline in 2016 compared to 2015.

PREFERRED EXPERIENCES FOR SENIORS TRAVELLERS HAVE SLIGHTLY CHANGED SINCE 2015



EUROPEAN CULTURE, GASTRONOMY AND BEAUTIFUL LANDSCAPES ATTRACT SENIORS MORE THAN THE YOUNGER GENERATIONS



The interest of seniors leans towards understanding the historical and cultural heritage of a destination and enjoying its natural and breath-taking landscapes. Furthermore, these more mature travellers seem to be more intrigued by Europe's gastronomic offer than their younger counterparts.

Travellers under the age of 50 are interested in shopping for luxury brands, rushing to see as much as possible in a short time, and having an active holiday experience when visiting Europe.

Note: Data featured is an aggregate of data collected in 2015 and 2016

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