

U.S. Department of Commerce
International Trade Administration



National Travel and Tourism Office

2014 Market Profile: Europe



2014 Market Profile: Europe

Visitation Trends (Arrivals)

[Thousands of Visitors]	2007	2008	2009	2010	2011	2012	2013	2014	Change 2014/2007
Total Arrivals	11,406	12,783	11,550	11,985	12,660	12,478	12,894	13,732	2,325
Percentage Change (%)	13	12	-10	4	6	-1	3	6	20

Spending Trends (Exports)

[Millions of U.S. Dollars]	2007	2008	2009	2010	2011	2012	2013	2014 ^p	Change 2014/2007
Total Travel and Tourism Exports ¹	\$41,595	\$52,178	\$42,015	\$44,755	\$50,137	\$50,551	\$51,129	October	-
Travel (all purposes including education)	\$33,672	\$41,096	\$33,537	\$35,825	\$39,471	\$39,679	\$39,559	\$39,769	\$6,097
Of which: Education Related	\$2,356	\$2,543	\$2,713	\$2,735	\$2,836	\$2,948	\$3,021	October	-
Of which: Other Business/ Personal Travel	\$30,629	\$37,831	\$30,128	\$32,483	\$35,984	\$36,055	\$35,839	October	-
Passenger Air Transportation	\$7,923	\$11,082	\$8,478	\$8,930	\$10,666	\$10,872	\$11,570	October	-
Change (%) in Total Exports	18	25	-19	7	12	1	1	-	-

⁽¹⁾ International standards now use a broader definition of travel than previously used, which includes education-related and health-related travel, as well as expenditures on goods and services by border, seasonal, and other short-term workers in the United States.

For more information, please visit: <http://travel.trade.gov/pdf/restructuring-travel.pdf>

^(p) Preliminary, subject to future revisions. Estimates on passenger fares, education and other business/personal travel spending will be available in October 2015.

Information Sources Used for Trip Planning

Information Sources Used (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change ⁽²⁾
Airlines	46	46	0.1
Online Travel Agency	34	36	2.0
Personal Recommendation	22	23	1.2
Travel Agency Office	20	20	-0.1
Travel Guides	13	14	1.1
Corporate Travel Dept.	13	12	-0.9
Tour Operator/Travel Club	8	8	-0.4
National/State/City Travel Office	7	7	0.0
Other	5	6	0.7

Main Purpose of Trip

Main Purpose of Trip	2013 (Percent)	2014 (Percent)	Point Change ⁽²⁾
Vacation/Holiday	58	61	2.3
Visit Friends/Relatives	18	18	0.4
Business	12	11	-0.6
Convention/Conference/Trade Show	6	6	-0.5
Education	4	3	-0.5
Religion/Pilgrimages	0	0	-0.1
Health Treatment	0	0	-0.1
Other	2	1	-0.8

All Purposes of Trip

Purpose of Trip (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change ⁽²⁾
Vacation/Holiday	69	71	2.1
Visit Friends/Relatives	30	30	0.0
Business	15	14	-0.6
Convention/Conference/Trade Show	8	8	-0.6
Education	6	5	-0.5
Religion/Pilgrimages	1	1	-0.1
Health Treatment	0	0	-0.1
Other	2	1	-1.1
NET PURPOSES OF TRIP:			
Leisure & VFR	81	83	2.4
Business & Convention	21	20	-1.0

Activity Participation While in the United States

Activity Participation While in the U.S. (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change ⁽²⁾
Shopping	87	88	0.1
Sightseeing	79	79	0.4
National Parks/Monuments	41	42	0.6
Experience Fine Dining	38	37	-1.0
Small Towns/Countryside	34	34	0.5
Art Gallery/Museum	35	33	-1.8
Historical Locations	33	33	-0.5
Guided Tours	27	27	-0.4
Amusement/Theme Parks	25	25	0.0
Concert/Play/Musical	19	20	0.3
Cultural / Ethnic Heritage Sites	18	18	-0.6
Nightclubbing/Dancing	17	17	0.3
Sporting Event	15	16	0.7
Casinos/Gamble	11	11	0.4
Water Sports	8	9	1.1
Camping/Hiking	6	6	0.7
American Indian Communities	5	6	0.5
Environ./Eco. Excursions	4	5	1.0
Golfing/Tennis	4	4	0.0
Hunting/Fishing	2	2	0.2
Snow Sports	2	1	-0.1
Other	2	2	-0.3



Transportation Used in the United States

Transportation Types Used in United States (multiple responses)	2013 (Percent)	2014 (Percent)	Point Change ⁽²⁾
City Subway/Tram/Bus	39	38	-1.4
Taxicab/Limousine	39	37	-1.6
Rented Auto	35	36	1.2
Auto, Private or Company	32	31	-0.8
Air Travel between U.S. Cities	27	26	-1.0
Bus between Cities	14	15	0.5
Ferry/River Taxi/Srt Scenic Cruise	14	13	-0.5
Railroad between Cities	8	7	-0.2
Cruise Ship/River Boat 1+ Nights	5	6	1.2
Rented Bicycle/Motorcycle/Moped	3	4	0.3
Motor Home/Camper	1	1	-0.1

Select Traveler Characteristics

Traveler Characteristics	2013	2014	Change ⁽²⁾
Advance Trip Decision Time (mean days)	115	117	2.2
Advance Trip Decision Time (median days)	90	90	0.0
Prepaid Package	13	13	0.3
First International Trip to the U.S.	22	21	-0.7
Length of Stay in U.S. (mean nights)	16.0	16.7	0.7
Length of Stay in U.S. (median nights)	10	10	0.0
Number of States Visited (% 1 state)	70	70	0.0
Average Number of States Visited	1.5	1.5	0.0
Hotel/Motel (% 1+ nights)	76	77	0.5
Average # of Nights in Hotel/Motel	9.8	9.4	-0.4
Travel Party Size (mean # of persons)	1.6	1.6	0.0
Gender: % Male (among adults)	54	53	-1.4
Household Income (mean average)	\$106,813	\$103,447	-\$3,366
Household Income (median average)	\$80,040	\$80,211	\$171
Average Age: Female (among adults)	40	40	-0.2
Average Age: Male (among adults)	41	42	0.5

2014 Market Profile: Europe

U.S. Destinations Visited (States, Cities, and Regions)

Visitation to U.S. Destinations/Regions ⁽³⁾	Market Share 2013 (Percent)	Volume 2013 (000)	Market Share 2014 (Percent)	Volume 2014 (000)
Regions				
Middle Atlantic	43.4	5,596	40.7	5,589
South Atlantic	30.1	3,881	32.5	4,463
Pacific	20.7	2,669	21.4	2,939
Mountain	13.3	1,715	13.7	1,881
New England	6.8	877	6.7	920
East North Central	7.5	967	6.4	879
West South Central	6.7	864	5.7	783
Pacific Islands	2.0	258	2.4	330
States				
New York	39.4	5,080	37.8	5,191
Florida	20.4	2,630	22.2	3,048
California	19.4	2,502	19.9	2,733
Nevada	10.2	1,315	10.8	1,483
Massachusetts	5.5	709	5.3	728
Texas	5.2	671	4.3	590
Illinois	4.9	632	4.1	563
Arizona	3.7	477	4.0	549
Pennsylvania	4.3	554	3.8	522
New Jersey	3.0	387	**	**
Georgia	**	**	3.1	426
Hawaii	**	**	2.2	302

...continued

2014 Market Profile: Europe

U.S. Destinations Visited (States, Cities, and Regions)

Visitation to U.S. Destinations/Regions ⁽³⁾	Market Share 2013 (Percent)	Volume 2013 (000)	Market Share 2014 (Percent)	Volume 2014 (000)
Cities				
New York City	38.7	4,990	36.9	5,067
Los Angeles	10.9	1,405	11.9	1,634
Las Vegas	9.9	1,277	10.4	1,428
San Francisco	11.0	1,418	10.4	1,428
Orlando	10.4	1,341	10.1	1,387
Miami	8.0	1,032	9.7	1,332
Washington, D.C.	5.8	748	6.2	851
Boston	4.9	632	4.7	645
Chicago	4.6	593	3.9	536
San Diego	**	**	3.2	439
Flagstaff/Grand Canyon/Sedona	**	**	3.1	426
Florida Keys	**	**	2.8	384
Houston	2.6	335	2.5	343
Philadelphia	3.1	400	2.5	343
Tampa-St. Petersburg	**	**	2.1	288

(1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incident to a foreign visit) + passenger fare receipts (fares paid to U.S. air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

(**) Estimate not shown due to sample size fewer than 400 for this year.

(p) Estimate is preliminary and subject to revision.

Note: This profile shows only a portion of the 37 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit our website: <http://travel.trade.gov/research/index.html>

For a list of the states that comprise each census region, please visit: http://travel.trade.gov/outreachpages/census_regions.html

Interested in data for your destination? The NTTO sells custom reports. To learn more, go to: <http://travel.trade.gov/research/programs/ifs/customized.html>

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office; Bureau of Economic Analysis

Publication Date: June 2015

Survey of International Air Travelers

The Survey of International Air Travelers provides a level of detail and insight into the traveler characteristics and travel patterns of international visitors to and from the United States not found elsewhere. Responses are weighted with data from the Department of Homeland Security and the following thirty-seven tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the international traveler who visits the United States.

Survey of International Air Travelers: Table Number and Description

Table 1	Country of Residence	Table 20	Number of Destinations Visited
Table 2	Information Sources	Table 21	Transportation in the U.S.
Table 3	Advance Trip Decision	Table 22	Port of Entry
Table 4	Advance Airline Reservation	Table 23	Main Destination
Table 5	Means of Booking Air Trip	Table 24	U.S. Destinations Visited
Table 6	Advance Air Ticket Payment	Table 25	Leisure Activities
Table 7	Prepaid, Inclusive Tour Package	Table 26	Total Trip Expenditures
Table 8	Pre-Booked Lodging	Table 27	Itemized Trip Expenditures
Table 9	Travel Insurance Purchased	Table 28	Trip Payment Methods - Average
Table 10	Travel Companions	Table 29	Payment Methods- Frequency
Table 11	Travel Party Size	Table 30	Payment Methods - Expen.Weighted
Table 12	Main Purpose of Trip	Table 31	Factors in Airline Choice
Table 13	Purpose(s) of Trip	Table 32	Main Factor in Airline Choice
Table 14	Type of Accommodation	Table 33	Seating Area
Table 15	Nights in the U.S.	Table 34	Type of Airline Ticket
Table 16	Total Nights Away From Home	Table 35	Gender and Age of Travelers
Table 17	First Trip to the U.S.	Table 36	Occupation
Table 18	U.S. Trips Last 12 months	Table 37	Annual Household Income
Table 19	Number of States Visited		



Interested in obtaining data for your organization?

One of the unique features of the Survey program is its 'data-mining' potential. The Survey research data, collected from the questionnaire, is maintained in a computer database. Therefore, customized reports, special tables and data files are available.

To learn more, go to: <http://travel.trade.gov/research/programs/ifs/index.html>

For NTTO programs of interest visit:

<http://travel.trade.gov/research/index.html>

- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (APIS, formerly I-92)
- Survey of International Air Travelers (SIAT)
- Canadian Statistics
- Forecast of International Arrivals to the United States
- U.S. Travel and Tourism Exports, Imports and the Balance of Trade
- U.S. Travel and Tourism Satellite Accounts

U.S. Department of Commerce

International Trade Administration
Industry & Analysis
National Travel and Tourism Office
1401 Constitution Ave, NW
Washington, D.C. 20230
Phone: (202) 482-0140
Fax: (202) 482-2887
ntto@trade.gov

<http://travel.trade.gov>