

U.S. Department of Commerce
International Trade Administration



National Travel and Tourism Office

2015 Market Profile: Europe



2015 Market Profile: Europe

Visitation Trends (Arrivals)

[Thousands of Visitors]	2008	2009	2010	2011	2012	2013	2014 ^r	2015 ¹	Change 2015/2008
Total Arrivals	12,783	11,550	11,985	12,660	12,478	12,895	14,161	15,699	2,917
Percentage Change (%)	12	-10	4	6	-1	3	10	11	23

Spending Trends (Exports)

[Millions of U.S. Dollars]	2008	2009	2010	2011	2012	2013 ^r	2014 ^r	2015 ^r	Change 2015/2008
Total Travel and Tourism Exports ²	\$52,178	\$42,015	\$44,755	\$50,137	\$50,603	\$52,267	\$56,859	\$60,723	\$8,545
Travel Receipts	\$41,096	\$33,537	\$35,825	\$39,471	\$39,731	\$40,985	\$44,880	\$49,489	\$8,393
Education Receipts	\$2,543	\$2,713	\$2,735	\$2,836	\$2,948	\$3,030	\$3,230	\$3,520	\$977
Other Business/Personal	\$37,831	\$30,128	\$32,483	\$35,984	\$36,055	\$37,106	\$40,760	\$45,039	\$7,208
Health/Border/Seasonal	\$722	\$696	\$607	\$651	\$728	\$849	\$890	\$930	\$208
Passenger Fare Receipts	\$11,082	\$8,478	\$8,930	\$10,666	\$10,872	\$11,282	\$11,979	\$11,234	\$152
% Change in Total Exports	25%	-19%	7%	12%	1%	3%	9%	7%	16%

Information Sources Used for Trip Planning

Information Sources Used (multiple responses)	2014 (Percent)	2015 (Percent)	Point Change ⁽³⁾
Airlines	46	46	0.2
Online Travel Agency	36	36	-0.5
Personal Recommendation	23	23	-0.2
Travel Agency Office	20	18	-1.1
Travel Guides	14	13	-1.4
Corporate Travel Dept.	12	12	0.3
Tour Operator/Travel Club	8	8	0.0
National/State/City Travel Office	7	6	-0.6
Other	6	5	-0.6

Main Purpose of Trip

Main Purpose of Trip	2014 (Percent)	2015 (Percent)	Point Change ⁽³⁾
Vacation/Holiday	61	60	-0.3
Visit Friends/Relatives	18	18	0.0
Business	11	12	0.6
Convention/Conference/Trade Show	6	6	0.3
Education	3	3	-0.2
Religion/Pilgrimages	0.2	0.2	0.0
Health Treatment	0.1	0.1	0.0
Other	0.8	0.4	-0.4

All Purposes of Trip

Purpose of Trip (multiple responses)	2014 (Percent)	2015 (Percent)	Point Change ⁽³⁾
Vacation/Holiday	71	71	-0.3
Visit Friends/Relatives	30	30	0.3
Business	14	14	-0.2
Convention/Conference/Trade Show	8	8	0.3
Education	5	5	-0.3
Religion/Pilgrimages	0.6	0.5	-0.1
Health Treatment	0.3	0.3	0.0
Other	1.1	0.5	-0.6
NET PURPOSES OF TRIP:			
Leisure & VFR	83	83	0.0
Business & Convention	20	20	0.3

Activity Participation While in the United States

Activity Participation While in the U.S. (multiple responses)	2014 (Percent)	2015 (Percent)	Point Change ⁽³⁾
Shopping	88	86	-1.2
Sightseeing	79	80	1.0
National Parks/Monuments	42	43	0.7
Experience Fine Dining	37	36	-1.4
Small Towns/Countryside	34	34	0.1
Art Gallery/Museum	33	34	0.7
Historical Locations	33	33	-0.2
Amusement/Theme Parks	25	27	1.4
Guided Tours	27	27	-0.1
Concert/Play/Musical	20	18	-1.8
Cultural / Ethnic Heritage Sites	18	18	0.2
Nightclubbing/Dancing	17	15	-1.9
Sporting Event	16	15	-0.3
Casinos/Gamble	11	11	-0.1
Water Sports	9	9	-0.2
Camping/Hiking	6	6	-0.3
American Indian Communities	6	6	0.0
Environ./Eco. Excursions	5	4	-0.5
Golfing/Tennis	4	4	-0.4
Hunting/Fishing	2.0	2.1	0.1
Snow Sports	1.4	1.0	-0.4
Other	1.8	1.6	-0.2



Transportation Used in the United States

Transportation Types Used in United States (multiple responses)	2014 (Percent)	2015 (Percent)	Point Change ⁽³⁾
City Subway/Tram/Bus	38	37	-0.9
Rented Auto	36	36	0.6
Taxicab/Limousine	37	36	-1.4
Auto, Private or Company	31	32	1.0
Air Travel between U.S. Cities	26	26	-0.6
Bus between Cities	15	14	-0.4
Ferry/River Taxi/Srt Scenic Cruise	13	14	0.2
Railroad between Cities	7	7	-0.2
Cruise Ship/River Boat 1+ Nights	6	5	-0.4
Rented Bicycle/Motorcycle/Moped	4	4	0.0
Motor Home/Camper	1.0	1.1	0.1

Select Traveler Characteristics

Traveler Characteristics	2014	2015	Change ⁽³⁾
Advance Trip Decision Time (mean days)	117	122	5.0
Advance Trip Decision Time (median days)	90	90	0.0
Prepaid Package	13	12	-0.7
First International Trip to the U.S.	21	21	0.0
Length of Stay in U.S. (mean nights)	16.7	16.4	-0.3
Length of Stay in U.S. (median nights)	10	10	0.0
Number of States Visited (% 1 state)	70	71	0.8
Average Number of States Visited	1.5	1.5	0.0
Hotel/Motel (% 1+ nights)	77	76	-1.1
Average # of Nights in Hotel/Motel	9.4	9.6	0.2
Travel Party Size (mean # of persons)	1.6	1.7	0.1
Gender: % Male (among adults)	53	53	-0.1
Household Income (mean average)	\$103,447	\$96,291	-\$7,156
Household Income (median average)	\$80,211	\$76,217	-\$3,994
Average Age: Female (among adults)	40	40	0.3
Average Age: Male (among adults)	42	42	0.1

2015 Market Profile: Europe

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

Visitation to U.S. Destinations/Regions ⁽³⁾ (Multiple Responses)	Market Share 2014 (Percent)	Volume 2014 ^r (000)	Market Share 2015 (Percent)	Volume 2015 ¹ (000)
Regions				
Middle Atlantic	40.71	5,765	37.33	5,861
South Atlantic	32.54	4,608	33.24	5,218
Pacific	21.38	3,028	21.76	3,416
Mountain	13.72	1,943	13.95	2,190
East North Central	6.38	903	7.39	1,160
New England	6.65	942	7.00	1,099
West South Central	5.71	809	6.00	942
West North Central	**	**	2.36	371
Pacific Islands	2.36	334	1.73	272
States				
New York	37.75	5,346	34.43	5,405
Florida	22.22	3,147	23.56	3,699
California	19.93	2,822	20.06	3,149
Nevada	10.78	1,527	10.68	1,677
Massachusetts	5.34	756	5.69	893
Illinois	4.14	586	4.96	779
Texas	4.34	615	4.26	669
Arizona	3.99	565	4.19	658
Pennsylvania	3.75	531	3.32	521
Georgia	3.07	435	3.23	507
New Jersey	**	**	2.55	400
Hawaii	2.19	310	1.68	264

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Visitation to U.S. Destinations/Regions ⁽³⁾ (Multiple Responses)	Market Share 2014 (Percent)	Volume 2014 ^r (000)	Market Share 2015 (Percent)	Volume 2015 ¹ (000)
Cities				
New York City	36.94	5,231	33.73	5,295
Orlando	10.06	1,425	12.02	1,887
Los Angeles	11.89	1,684	11.10	1,743
San Francisco	10.41	1,474	10.67	1,675
Las Vegas	10.45	1,480	10.43	1,637
Miami	9.73	1,378	10.37	1,628
Washington, D.C.	6.21	879	5.83	915
Boston	4.73	670	5.10	801
Chicago	3.91	554	4.66	732
San Diego	3.19	452	3.30	518
Flagstaff/Grand Canyon/Sedona	3.10	439	2.97	466
Florida Keys	2.75	389	2.97	466
Tampa-St. Petersburg	2.07	293	2.35	369
Philadelphia	2.51	355	2.34	367
Houston	2.53	358	2.14	336

(1) 2015 arrivals and percent change reflect a combination of additional records counted and market conditions.

(2) 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).

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>

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

(4) 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.

(n/a) Not available.

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

(r) Estimate was revised.

(p) Estimate is preliminary and subject to revision.

Note: Estimate not shown due to sample size fewer than 400 for this year. This profile shows only a portion of the 37 travel attributes 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? NTTO sells custom reports. To learn more, visit: <http://travel.trade.gov/research/programs/ifs/customized.html>

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

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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.

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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>