



ETC Transatlantic Conference

US Travel Market and
Consumer Trends

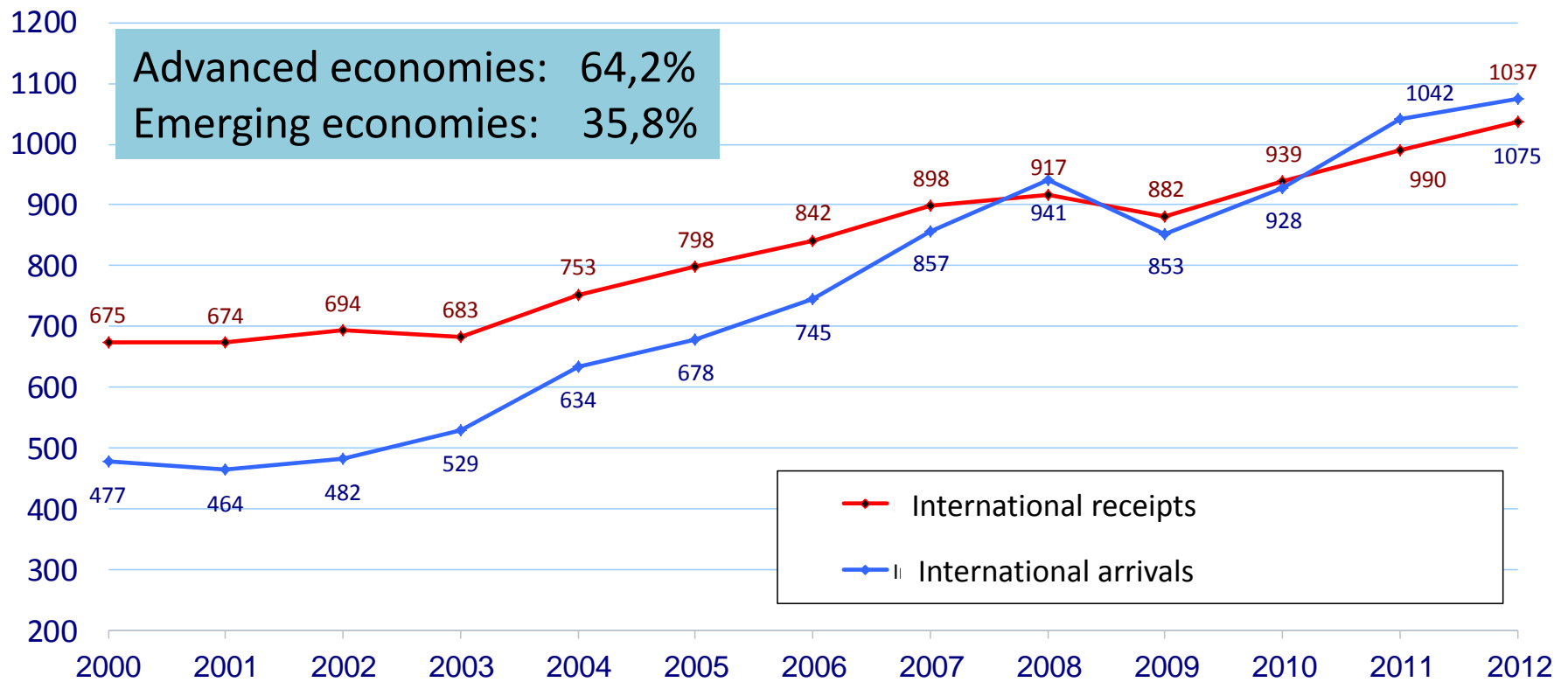
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Regional Director for the Americas
UNWTO



World tourism in 2012

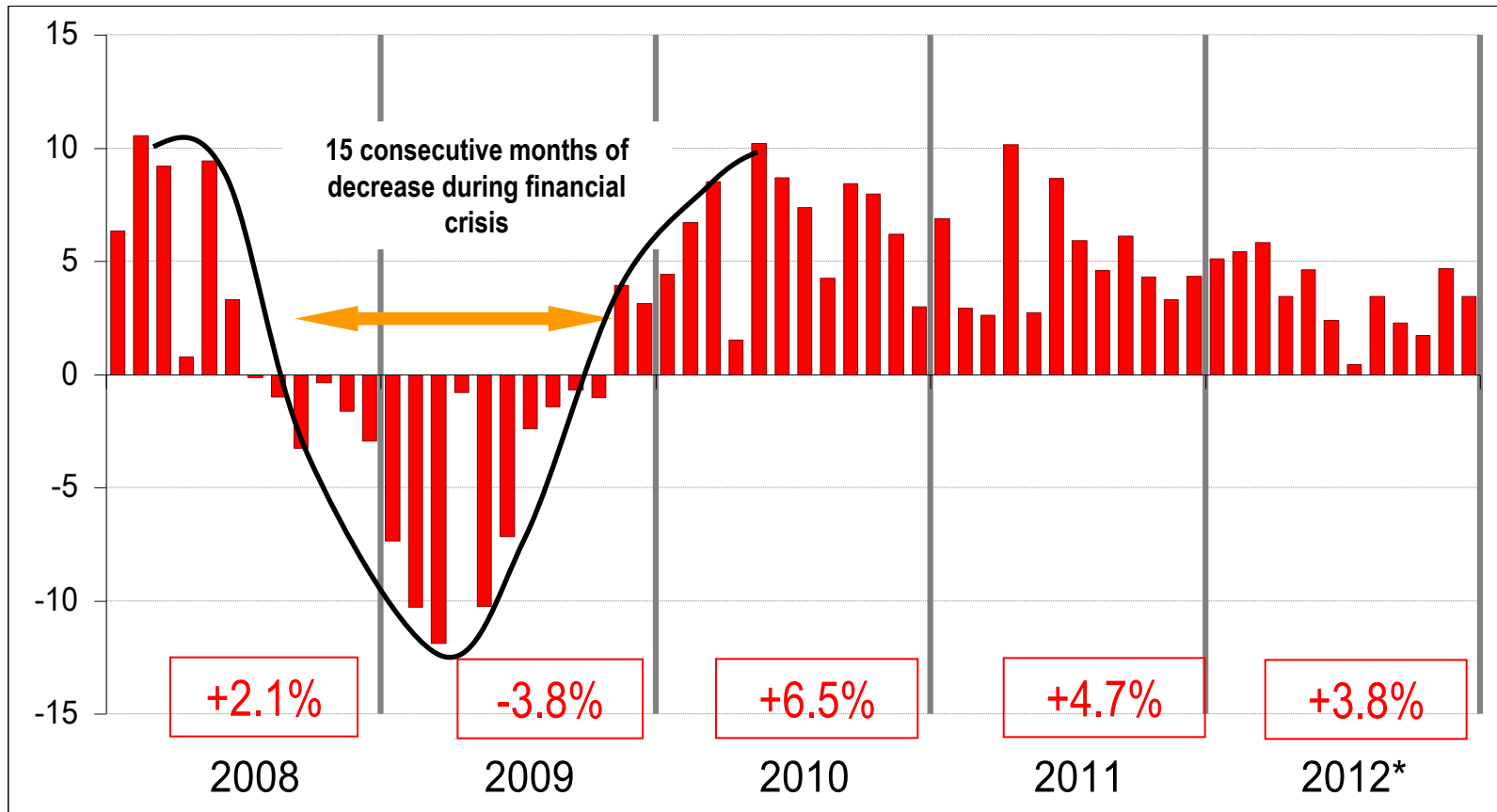
Arrivals: 1,037 billion (+ 4%)
Receipts: \$ 1,075 billion (+4%)



International tourism resilience

Monthly world evolution of international tourism arrivals

% variation

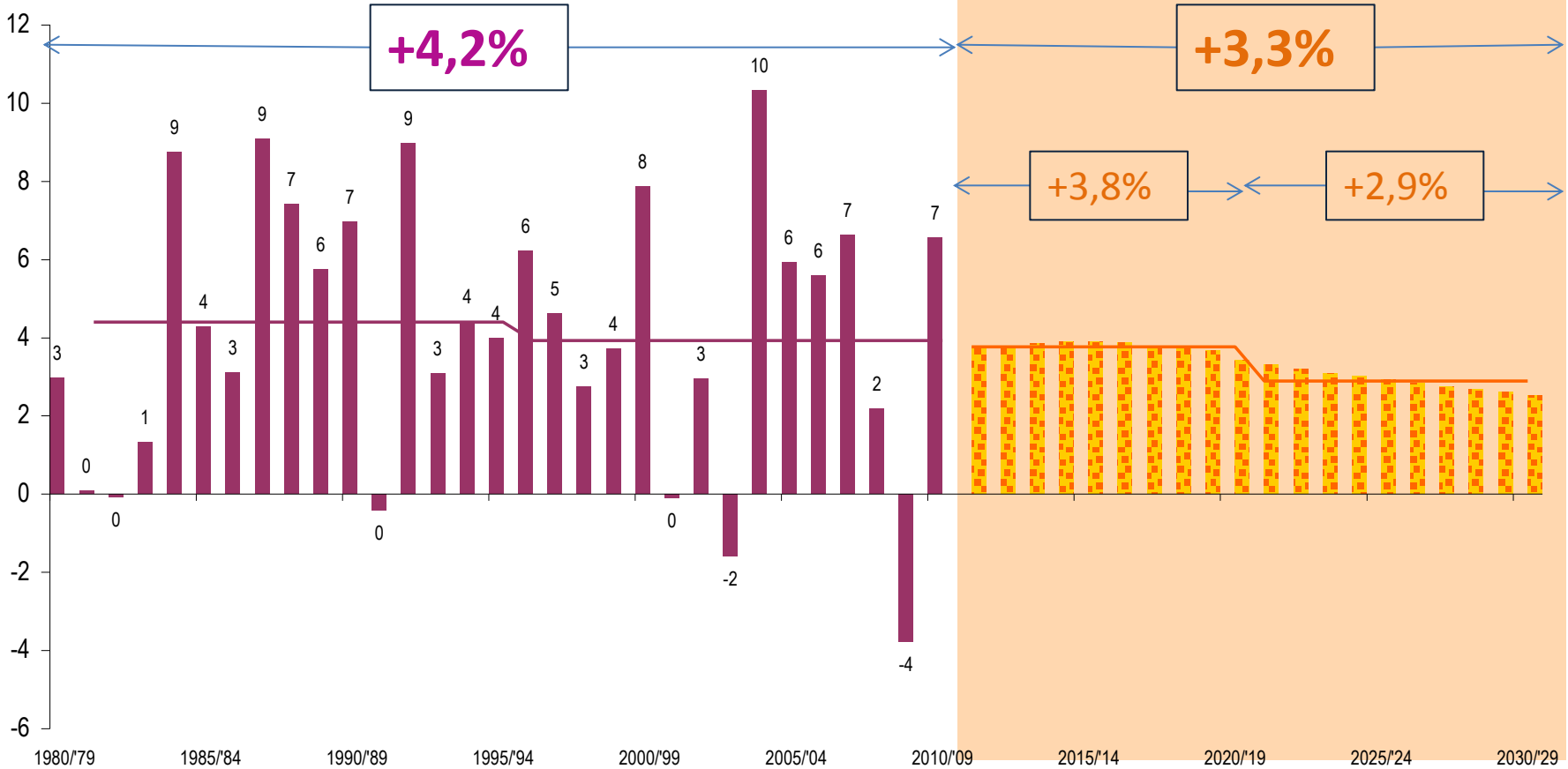


Main international outbound countries

Country	Expenditure 2012 (million \$)	Var. 11/10 %	Var. 12*/11 %
 China	102.000	+ 32,3	+ 40,5
 Germany	83.800	+ 4,7	+ 5,8
 USA	83.700	+ 4,2	+ 6,4
 UK	52.300	- 1,6	+ 4,1
 Russia	42.800	+ 22,1	+ 31,8
 France	38.100	+ 7,6	- 6,4
 Canada	35.200	+ 8,2	+ 6,7
 Japan	28.100	- 11,2	+ 3,1
 Australia	27.600	+ 7	+ 2,9

Growth in international tourism will continue, but at a more moderate pace

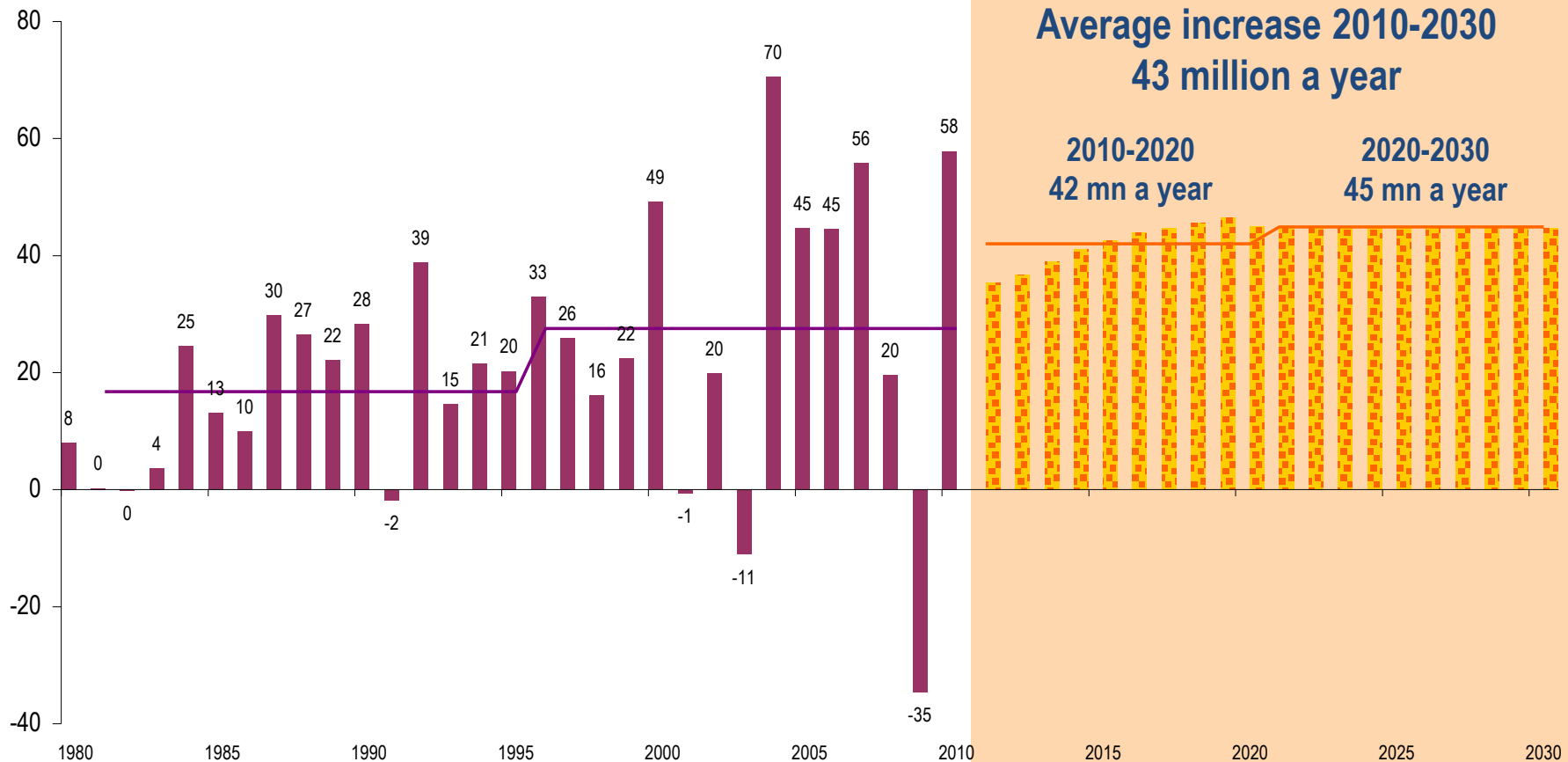
International tourism, World



International tourist arrivals to increase by 43 million a year on average

International tourism, World

International Tourist Arrivals, absolute change over previous year, million



**Average increase 2010-2030
43 million a year**

**2010-2020
42 mn a year**

**2020-2030
45 mn a year**



World Tourism Organization | a specialized Agency of the United Nations

Source: World Tourism Organization (UNWTO)

International tourist arrivals to reach 1.8 billion by 2030

International tourism, World



World Tourism Organization | a specialized Agency of the United Nations

Source: World Tourism Organization (UNWTO)

ETC-UNWTO Study on US Outbound Travel to Europe



Aim

- Overview of US market and future outlook

Methodology

- Consumer focus groups
- Tour operator interviews
- www.VisitEurope.com user survey
- Desk research

Consultants:

- Yellow Railroad
- TNS Research International
- TEAM - Tourism Consulting



Europe offers US travellers:

- Centuries of history and a diverse range of cultures
- Famous cities & scenic landscapes
- Attractions that interpret the way of life and people's heritage
- A rich Gastronomy tapestry
- Few language barriers with English widely spoken
- Relatively safe compared to other regions in the world
- Reliable tourism infrastructure and services

All within a relatively compact space



Travel Profile: US Visitors to Europe

- **Middle-aged-older couples** (av. men = 47, women = 45)
- **1 European country per visit** (70%)
- **Residence:**
 - Middle Atlantic states (30%)
 - South Atlantic states (25%)
 - Pacific states (14%)
 - Top states: New York (17%), California (10.7%)
- **Household income:** US\$ 116,000 – financially resilient
- **Travel-confident**



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Information and Booking Sources

Mobile Devices:

- 40% of US international travellers own smartphones
- 30 million Americans research travel via mobile devices
 - Up from 19.7million in 2010 (Source: eMarketer)
- Mobile booking moved from 8.7 million in 2010 to 15.1 million in 2012
- Tablets may overtake phones for information & booking





**Thank you very
much!**

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