



Manufacturing and Services

Office of Travel and Tourism Industries

2008 Market Profile: Western Europe



2008 Market Profile: Western Europe

Visitation Trends (Arrivals)

[Thousands of W. European Visitors]	2001	2002	2003	2004	2005	2006	2007	2008	Change 2008/2001
Total Arrivals	9,111	8,248	8,294	9,306	9,880	9,675	10,894	12,198	3,087
Percentage Change (%)	-18%	-9%	1%	12%	6%	-2%	13%	12%	34%

Spending Trends (Exports)

[Millions of U.S. Dollars]	2001	2002	2003	2004	2005	2006	2007	2008	Change 2008/2001
Total Travel & Tourism Exports (1)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Travel Receipts	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Passenger Fare Receipts	Data Unavailable								
Change (%) in Total Exports	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Information Sources Used for Trip Planning

Information Sources Used (multiple response: top 4 of 12)	2007	2008	% Point Change (2)
Personal Computer	44%	47%	3 pts.
Travel Agency	34%	32%	-3 pts.
Airlines Directly	19%	21%	3 pts.
Friends/Relatives	12%	13%	1 pt.

2008 Market Profile: Western Europe

Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2007	2008	% Point Change (2)
Leisure/Rec./Holidays	50%	53%	4 pts.
Business/Professional	24%	21%	-3 pts.
Visit Friends/Relatives	20%	18%	-2 pts.
Convention/Conference	3%	4%	1 pt.

All Purposes of Trip

Purpose of Trip (multiple response--top 4 of 8)	2007	2008	% Point Change (2)
Leisure/Rec./Holidays	63%	67%	4 pts.
Visit Friends/Relatives	32%	32%	0 pts.
Business/Professional	27%	24%	-3 pts.
Convention/Conference	6%	6%	1 pt.
NET PURPOSES OF TRIP:			
Leisure & VFR	78%	80%	2 pts.
Business & Convention	30%	28%	-2 pts.

Transportation Used in the United States

Transportation Types Used in United States (multiple response--top 5 of 8)	2007	2008	% Point Change (2)
Taxi/Cab/Limousine	44%	43%	-1 pt.
Rented Auto	31%	33%	2 pts.
City Subway/Tram/Bus	23%	26%	4 pts.
Company or Private Auto	23%	23%	0 pts.
Airlines in U.S.	20%	21%	0 pts.

2008 Market Profile: Western Europe

Activity Participation While in the United States

Activity Participation While in the U.S. (multiple response--top 10 of 25)	2007	2008	% Point Change (2)
Dining in Restaurants	89%	89%	0 pts.
Shopping	86%	87%	1 pt.
Visit Historical Places	42%	45%	3 pts.
Sightseeing in Cities	41%	44%	3 pts.
Amusement/Theme Parks	26%	27%	1 pt.
Visit Small Towns	25%	27%	3 pts.
Art Gallery/Museum	26%	27%	1 pt.
Cultural Heritage Sites	25%	27%	2 pts.
Touring Countryside	20%	22%	2 pts.
Water Sports/Sunbathing	20%	22%	2 pts.

Select Traveler Characteristics

Traveler Characteristics	2007	2008	Change (2)
Advance Trip Decision Time (mean days)	96	104	8 days
Advance Trip Decision Time (med. days)	60	60	0 days
Prepaid Package	15%	14%	-1 pt.
First International Trip to the U.S.	21%	23%	2 pts.
Length of Stay in U.S. (mean nights)	14.0	14.7	1 night
Length of Stay in U.S. (median nights)	8.0	10.0	2 nights
Number of States Visited (% 1 state)	71%	67%	-3 pts.
Average Number of States Visited	1.5	1.5	0 states
Hotel/Motel (% 1+ nights)	80%	81%	1 pt.
Average # of Nights in Hotel/Motel	8.1	8.4	0 nights
Travel Party Size (mean # of persons)	1.6	1.6	0.0
Gender: % Male (among adults)	59%	58%	-1 pt.
Household Income (mean average)	\$112,900	\$114,100	\$1,200
Household Income (median average)	\$103,600	\$104,700	\$1,100
Average Age: Female	40	41	1 year
Average Age: Male	43	43	0 years

2008 Market Profile: Western Europe

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

Visitation to U.S. Destinations/Regions (3)	Market Share 2007	Volume 2007 (000)	Market Share 2008	Volume 2008 (000)
REGIONS				
Middle Atlantic	43.3%	4,717	44.6%	5,440
South Atlantic	30.4%	3,312	31.6%	3,855
Pacific	19.6%	2,135	20.8%	2,537
Mountain	10.9%	1,187	12.4%	1,513
East North Central	8.3%	904	9.1%	1,110
New England	7.5%	817	7.7%	939
West South Central	4.8%	523	4.7%	573
STATES				
New York	38.8%	4,227	39.5%	4,818
Florida	21.4%	2,331	21.4%	2,610
California	18.3%	1,994	19.1%	2,330
Nevada	7.5%	817	9.1%	1,110
Massachusetts	5.9%	643	5.9%	720
Illinois	5.2%	566	5.9%	720
Pennsylvania	4.3%	468	5.1%	622
New Jersey	3.7%	403	4.1%	500
Texas	**	**	3.7%	451
CITIES				
New York City	37.7%	4,107	38.8%	4,733
Orlando	11.7%	1,275	11.8%	1,439
San Francisco	9.7%	1,057	11.2%	1,366
Los Angeles	8.0%	871	9.4%	1,147
Las Vegas	7.3%	795	8.8%	1,073
Miami	6.7%	730	7.3%	890
DC Metro Area	4.8%	523	6.2%	756
Chicago	5.0%	545	5.7%	695
Boston	5.4%	588	5.2%	634
Philadelphia	**	**	3.7%	451
Tampa-St. Petersburg	2.1%	229	2.0%	244

2008 Market Profile: Western Europe

- (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 incidental 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.
- (n/a) Estimate not available.
- (**) Estimate not shown due to sample size fewer than 400 for this year.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States.

Additional information may be obtained for a fee. To learn more, please visit:
<http://tinet.ita.doc.gov/research/programs/ifs/index.html>.

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

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

Publication Date: May 2009



INTERNATIONAL
TRADE
ADMINISTRATION

Survey of International Air Travelers

The Survey of International Air Travelers (or “In-Flight” survey) 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-five tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the W. European traveler who visits the United States.

Survey of International Air Travelers: Table Number and Description

Table 1	Country of Residence	Table 19	Number of States Visited
Table 2	Advance Trip Decision	Table 20	Number of Destinations Listed
Table 3	Advance Airline Reservation	Table 21	Transportation in U.S.
Table 4	Means of Booking Air Trip	Table 22	Port of Entry
Table 5	Information Sources	Table 23	Main Destination
Table 6	Use of Package	Table 24	U.S. Destinations Visited
Table 7	Use of Prepaid Lodging	Table 25	Leisure Activities
Table 8	Advance Package Booking	Table 26	Total Trip Expenditures
Table 9	Pre-Booked Lodging	Table 27	Itemized Trip Expenditures
Table 10	Travel Companions	Table 28	Trip Expenses Payment Method
Table 11	Travel Party Size	Table 29	Factors in Airline Choice
Table 12	Main Purpose of Trip	Table 30	Main Factor in Airline Choice
Table 13	Purpose of Trip	Table 31	Type of Airline Ticket
Table 14	Type of Accommodation	Table 32	Seating Area
Table 15	Nights in the U.S.	Table 33	Gender & Age of Traveler
Table 16	First Int'l U.S. Trip	Table 34	Occupation
Table 17	U.S. Trips Last 12 Months	Table 35	Annual Household Income
Table 18	U.S. Trips Last 5 Years		



Interested in obtaining data for *your* organization?

OTTI produces custom reports for a fee! To learn more, please visit:

<http://www.tinet.ita.doc.gov/research/programs/ifs/customized.html>

Other OTTI programs that may be of interest:

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

For more information on these program areas and others, please visit:

<http://tinnet.ita.doc.gov/research/index.html>

U.S. Department of Commerce

International Trade Administration
Manufacturing and Services
Office of Travel and Tourism Industries
14th & Constitution Ave, NW
Washington, D.C. 20230
Phone: (202) 482-0140
Fax: (202) 482-2887
tinnet_info@mail.doc.gov

<http://tinnet.ita.doc.gov>