


# U.S. TRAVEL MARKET

1 in 10 dollar spent in international tourism is sourced from the U.S. With 36% of the market share, Europe reigns as the top region, offering a myriad of opportunities for the European travel supplier... and challenges to address too!


## COUNTRY OVERVIEW

 **326+**  
Million residents

**82%**   
Live in urban areas

 **\$38,989**  
Annual disposable income per capita

**GDP**  
**+20% growth**  
From 2011 to 2016

  
**1,26%**  
Inflation

**1**   = 0,81

In 2050, **65+ population** projected to be **83.7 million** vs 43.1 million in 2012

**42%**  
of US residents hold a **passport**

**61%** Non-Hispanic  
**18%** Hispanic  
**13%** Black  
**6%** Asian



## REGULATORY ENVIRONMENT FOR TOURISM

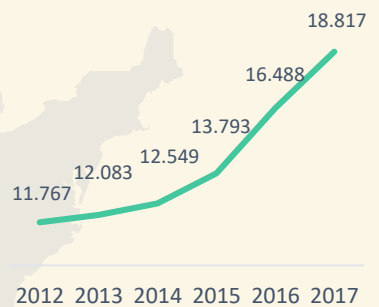
**Did you know?** As of 2017, a U.S. passport allows visa-free or on arrival access to 174+ countries. EU's Schengen Area only requests a minimum of 3 month's validity on passport upon arrival date.

**77%** of private employers **offer paid vacation to their employees** (no legislation applies). U.S. employees take 14 days on average after 5 years of service.

**TOP Growth**  
in passport  
Issuance %  
2017/2011

MONTANA	104%
MAINE	84%
NEVADA	83%
PUERTO RICO	83%
IDAHO	83%
UTAH	81%
ARIZONA	80%
NEW MEXICO	79%
OREGON	76%
MISSOURI	75%

**Passport Issuance ('000)**



### National Travel and Tourism Office

Federal (U.S. Dep. of Commerce)  
Regulation, Advisory, Industry Analysis, Export, Marketing

### Travel and Tourism Advisory Board

Federal (U.S. Dep. of Commerce)  
Advisory on government policy

### Brand USA

Public-private partnership  
DMO of United States that promotes travel to USA

### US Travel Association

Private Trade Association  
Advocacy activities



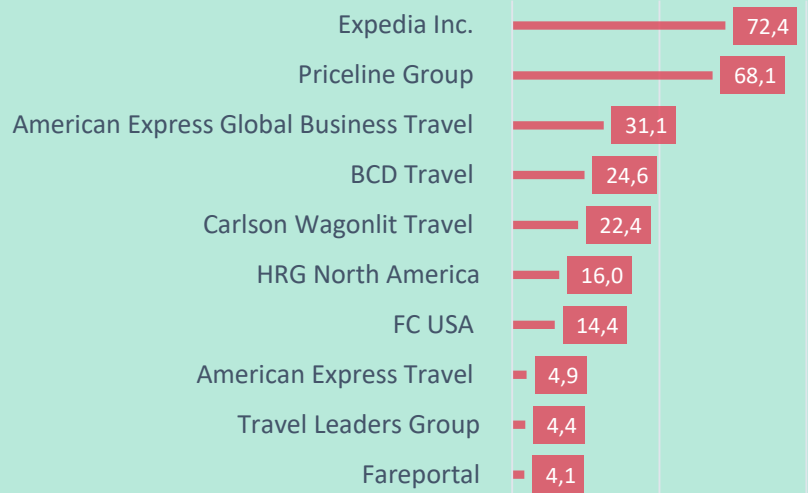
# TRAVEL TRADE

## Key Stakeholders



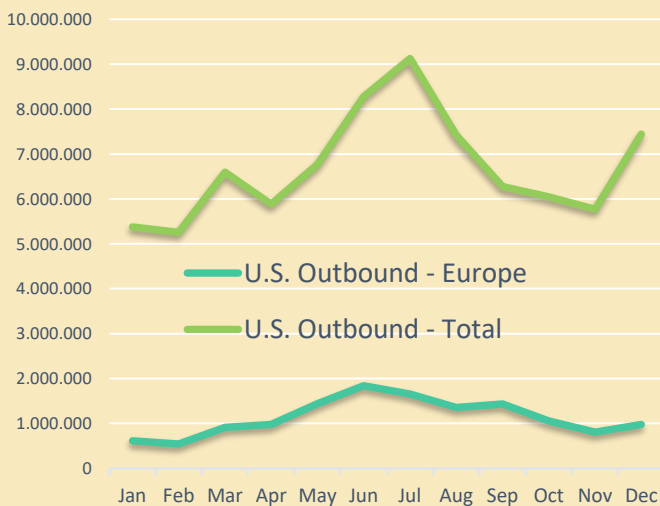
## Top 10 US Travel Groups in 2017

(earnings in billion \$)



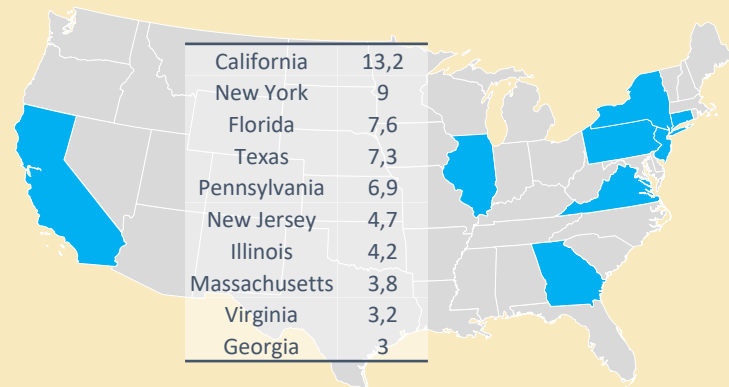
## NATURE OF OUTBOUND TRIPS

U.S. outbound travel peaks in July, whereas U.S. outbound travel to Europe peaks in June. February is the least travelled month for both total U.S. outbound travel volume and to Europe.



## Top 10 Outbound States

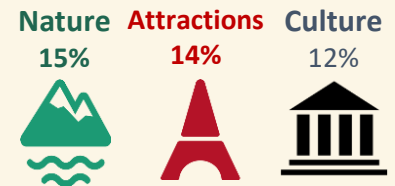
Share of visitation to Europe - 2016



## Top Planning Sources in 2016

Airlines	52%
OTA	33%
Personal Recommendation	22%
Travel Agency Office	15%
Travel Guides	11%
Tour Operator/Travel Club	10%

## Top 3 Reasons to Visit Europe



## TIPS ON THE US TRAVEL MARKET

With € rising vs \$, ensure your marketing strategy focuses on the segment that are **LESS PRICE SENSITIVE**

Facing global competition, don't try to be everything to anyone! Offer niche product and **MOTIVATIONAL TRAVEL EXPERIENCES**

Don't just focus on large U.S. urban centers. New layer of people will fly that normally can't afford to fly trans-Atlantic.

Don't sugarcoat the reality of the terrorism threat. In case of issues, **INFORM** and **BE TRANSPARENT**, and have a flexible travel cancellation policy

U.S. travellers are looking for experiences. Don't place all bets on top destinations in Europe

Brexit will impact on US/UK Open Skies agreement. Put in place a transition deal to mitigate uncertainties and monitor low-cost carriers development

**INFUSE DEEPER** into U.S. travel supplier market. Join annual marketplace event or partner with leading US industry organisations