

European Consumer Travel Report Sixth Edition

*Key Consumer Trends Shaping the
European Travel Economy*

September 2016

Written and Researched by
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About Phocuswright

Phocuswright is the travel industry research authority on how travelers, suppliers and intermediaries connect.

Independent, rigorous and unbiased, Phocuswright delivers qualitative and quantitative research on the evolving dynamics that influence travel, tourism and hospitality distribution. Our marketplace intelligence is the industry standard for segmentation, sizing, forecasting, trends, analysis and consumer travel planning behavior. Every day around the world, senior executives, marketers, strategists and research professionals from all segments of the industry value chain use Phocuswright research for competitive advantage.

The company is headquartered in the United States with Asia Pacific operations based in India and local analysts on five continents.

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Methodology

Phocuswright fielded an online survey on April 4-18, 2016, through Global Market Insights, Inc., targeting the general French, German and U.K. adult populations that have Internet access and travel for leisure.

To qualify for participation in the study, respondents had to indicate having taken at least one overnight leisure trip that included paid accommodations at least 100 kilometers from home and/or taken flights/rail for leisure travel in the past 12 months. An additional screener required consumers to have played an active role in planning their leisure trips. Respondents who qualified are referred to as “French/German/U.K. travelers.” Paid accommodations include hotels and other nightly priced lodging products, as well as time-share and vacation rentals. The term “lodging” is used in this report to refer to the broad range of paid accommodations.

Phocuswright received 3,159 qualified responses (France 1,042; Germany 1,071; U.K. 1,046) and the respondent pool can be projected with

confidence to the adult population with Internet access. Travel incidence levels were calculated based on the responses of 5,736 adults. The error interval for analysis of the traveler population for each country is +/-3% at a 95% confidence level.

Based on data from Eurostat, Phocuswright projects the number of adults with Internet access who have taken at least one leisure trip in 2016 to be 30 million in France, 43 million in Germany and 31 million in the U.K. (see Figures 1, 2 and 3). Because this report focuses on travel planning, respondents were required to play an active role in planning their trips. This requirement disqualified 21% of the total traveler group. These consumers who traveled but did not plan their trips were counted in the traveler incidence calculation, but are not included in subsequent analysis.



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European Travelers: France, Germany & the U.K.



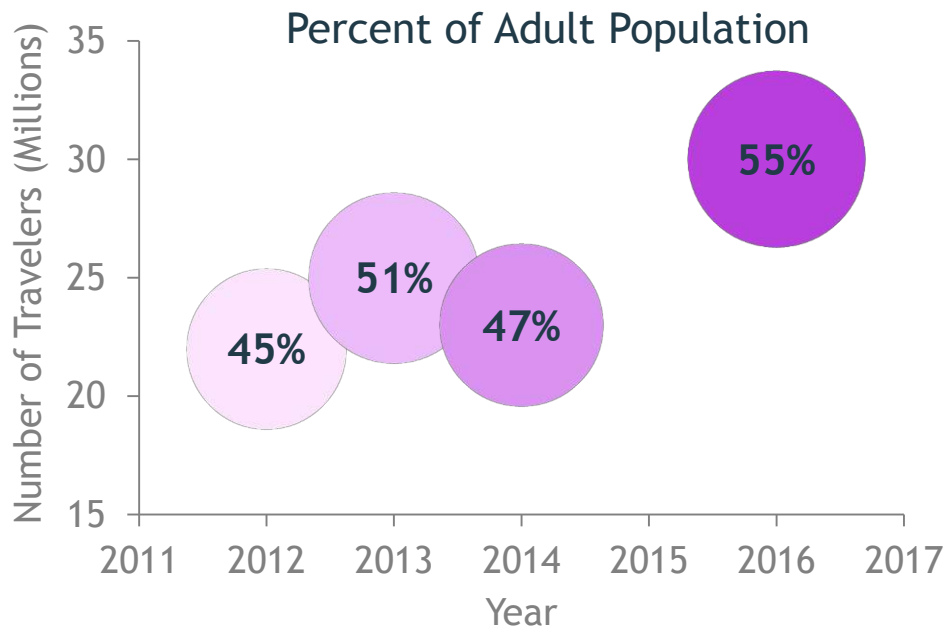
Travel plays a significant role in European culture. Even in the face of a weakening currency, consumers are **relentless with their travel plans** and more adults are packing their bags than ever before.

Travelers are **cutting back where they can**, meaning fewer trips and packaged holidays. However, they are holding out for **long, international excursions** to new destinations.



Traveler Population: France

After several years of stagnation, the French economy made a slight recovery in 2015, growing 1.1% overall. But obstacles loom, including the threat of terrorism and an unemployment rate that has remained near an 18-year high. These competing forces have created a changing travel landscape for France: The traveler pool is growing but with more cost-conscious travelers.



There are 30 million travelers in France, or 55% of the adult population.

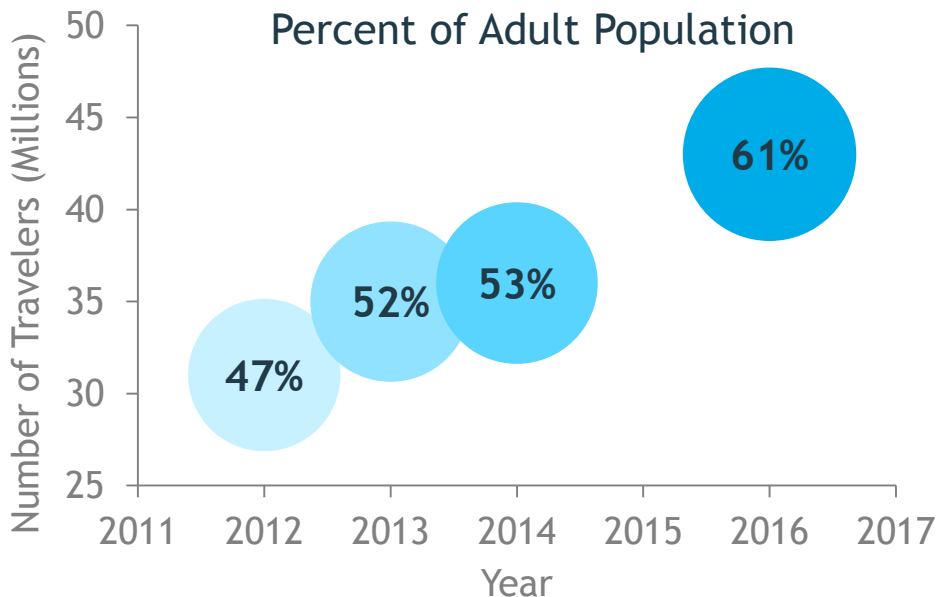
Sources: Eurostat; [Phocuswright's European Consumer Travel Report Sixth Edition](#)

Base: French consumers who have stayed in paid accommodations and/or taken flights/rail for leisure travel in the past 12 months (N=1,042)



Traveler Population: Germany

Germany, the largest economy in Europe, continues to expand, with the first quarter of 2016 showing its strongest GDP growth in two years. Additionally, unemployment has fallen to its lowest level in 35 years and household spending reached an all-time high of €388 billion. Strong consumer confidence among Germans translates to a stable, yet strong, travel environment.



There are 43 million travelers in Germany, or 61% of the adult population.

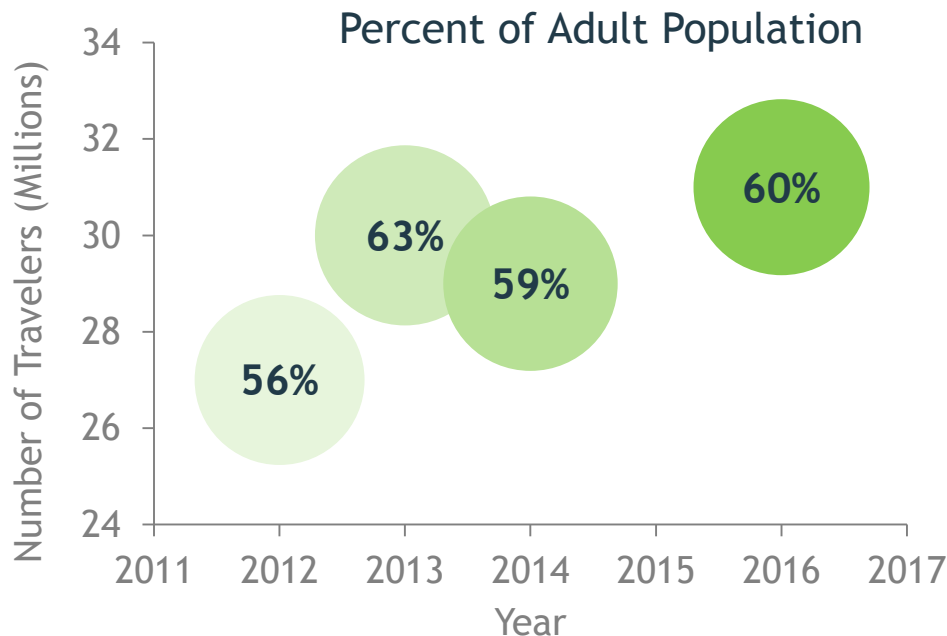
Sources: Eurostat; Phocuswright's *European Consumer Travel Report Sixth Edition*

Base: German consumers who have stayed in paid accommodations and/or taken flights/rail for leisure travel in the past 12 months (N=1,071)



Traveler Population: U.K.

Just as consumer optimism rose to its highest levels in years in 2015, confidence plummeted in early 2016 as pre-Brexit worries loomed. Unemployment remains at its lowest rates in a decade, but inflation continues to rise and Britons have cut back on leisure travel. This already wavering economy, combined with the Brexit fallout, casts a shadow on the near-term outlook for travel and tourism in the U.K.



There are 31 million travelers in the United Kingdom, or 60% of the adult population.

Sources: U.K. Office for National Statistics; Eurostat; Phocuswright's *European Consumer Travel Report Sixth Edition*

Base: U.K. consumers who have stayed in paid accommodations and/or taken flights/rail for leisure travel in the past 12 months (N=1,046)





Together, France,
Germany and U.K.
comprise approximately
60% of the total
European travel market,
or €158 billion in gross
bookings in 2015.

Source: Phocuswright's *European Online Travel Overview Eleventh Edition*



How Europeans Are Traveling



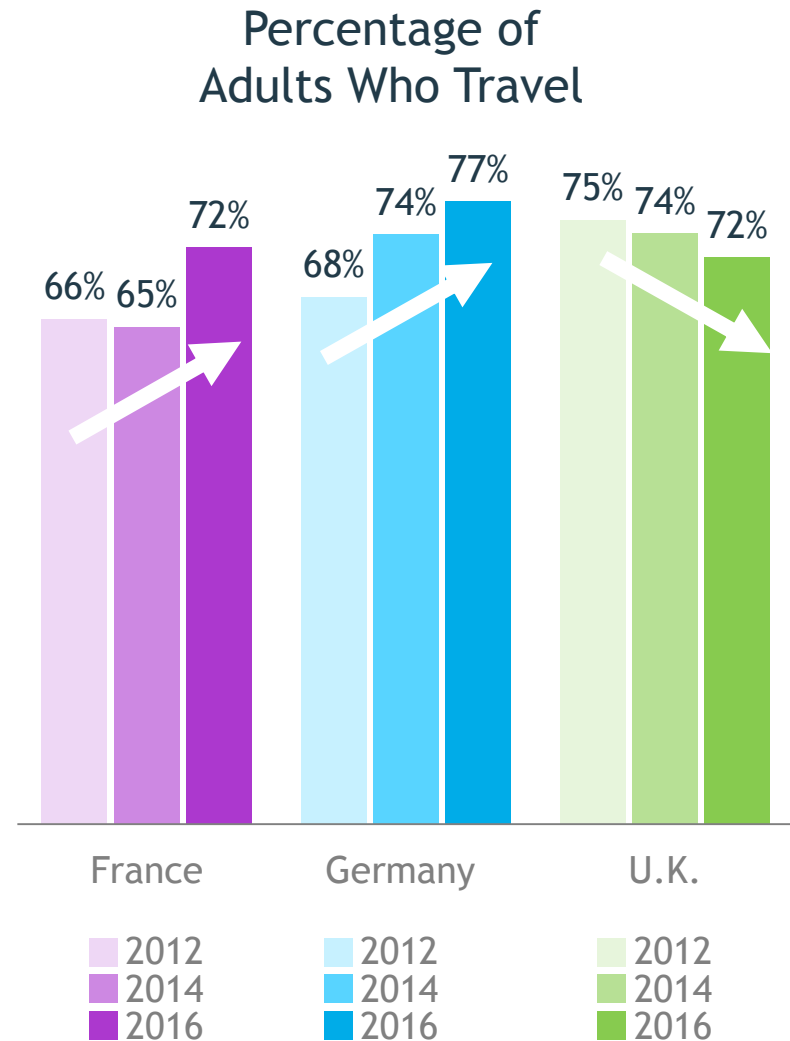


It's a marketplace of mixed signals and lingering economic uncertainty. More Europeans are traveling, but they are not necessarily spending more, amid significant shifts in where they go and what they buy.

Source: Phocuswright's *European Online Travel Overview Eleventh Edition*



Germany continues to be a travel powerhouse and France is catching up. The U.K., however, is beginning to show worrying signs with a declining travel population for the past four years.

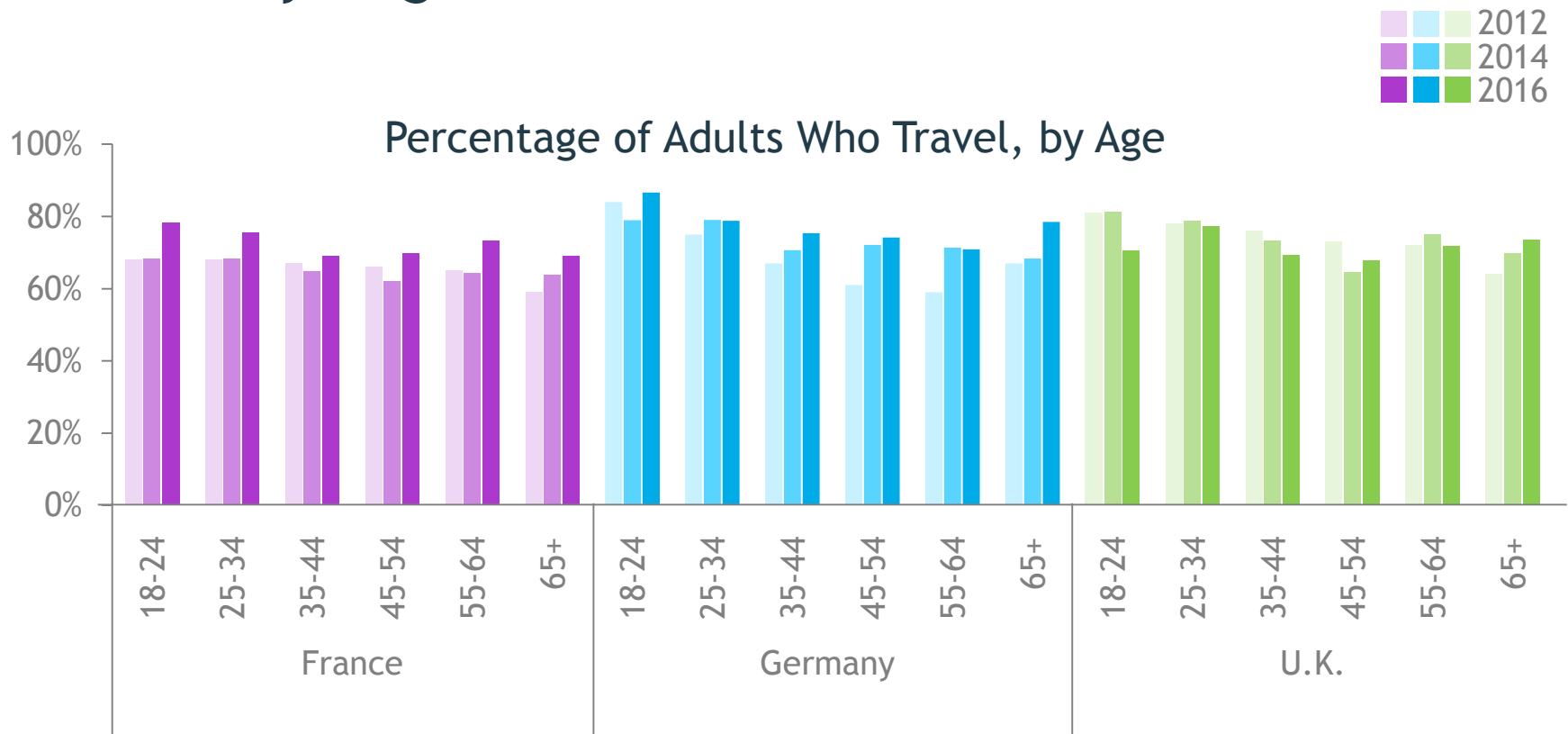


Question: Which of the following, if any, have you done while traveling for leisure in the past 12 months? (a) Stayed overnight in paid accommodations (i.e., hotel, bed & breakfast) located at least 100 km away from your home; (b) Traveled via airplane; (c) Traveled by rail for an overnight trip.

Base: Internet users: France (2012 N=1,961, 2014 N=2,229, 2016 N=1,935); Germany (2012 N=1,827, 2014 N=2,320, 2016 N=1,877), U.K. (2012 N=1,961, 2014 N=1,945, 2016 N=1,924)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*

Adults of all ages are joining the traveler pool in France and Germany. Meanwhile, the U.K. is showing a sharp decline in young travelers.



Question: Which of the following, if any, have you done while traveling for leisure in the past 12 months? (a) Stayed overnight in paid accommodations (i.e., hotel, bed & breakfast) located at least 100 km away from your home; (b) Traveled via airplane; (c) Traveled by rail for an overnight trip.

Base: Internet users: France (2012 N=1,961, 2014 N=2,229, 2016 N=1,935); Germany (2012 N=1,827, 2014 N=2,320, 2016 N=1,877); U.K. (2012 N=1,961, 2014 N=1,945, 2016 N=1,924)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*

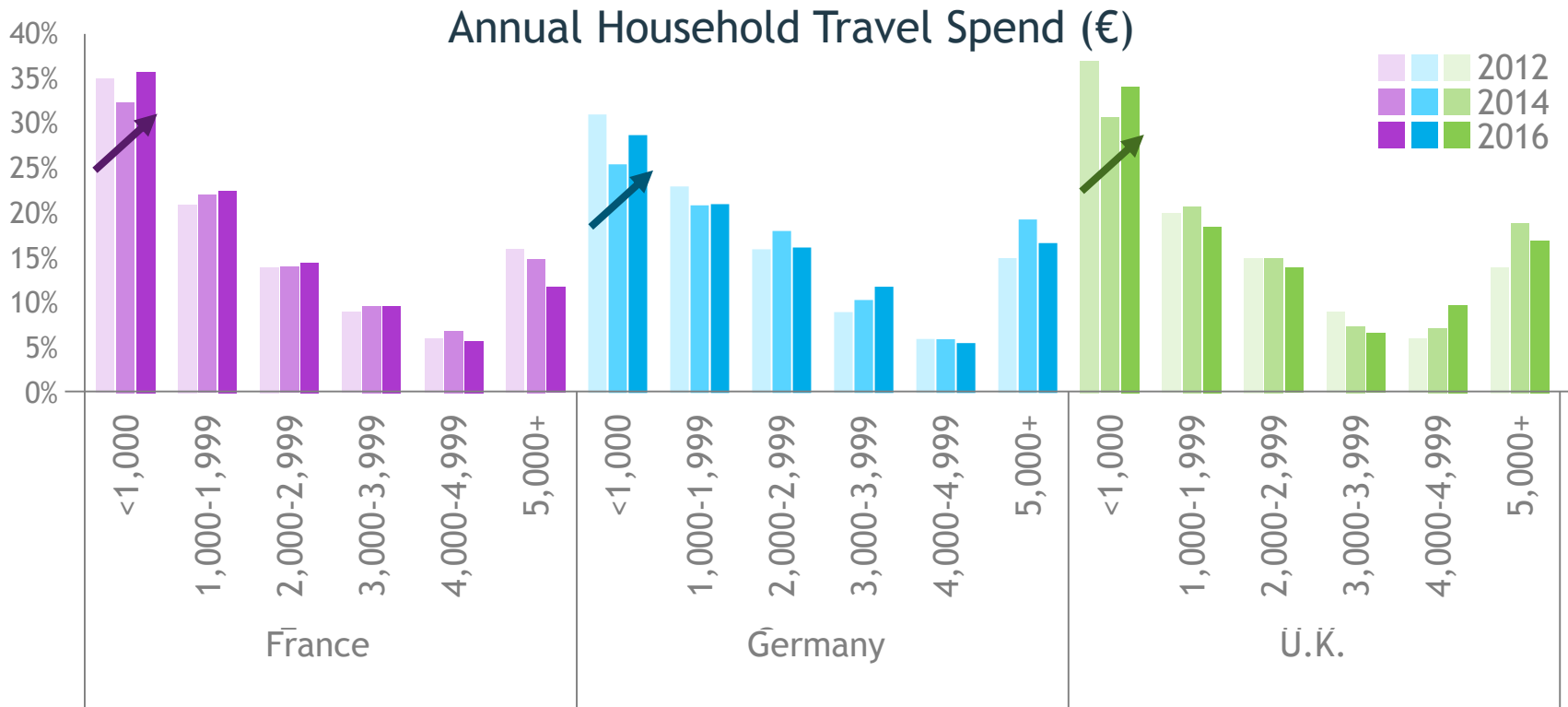




More consumers are feeling the need to pack their bags, but the falling euro and pound are altering the travel landscape.

Travel spend is down across the board.

As the traveler pool continues to expand, it has added more low spenders.



Question: What was the total amount your household spent on travel components (including airline tickets, paid lodging, car rental, cruise tickets, railway tickets for overnight trips) for your N leisure trips in the past year? Enter whole number without currency sign.

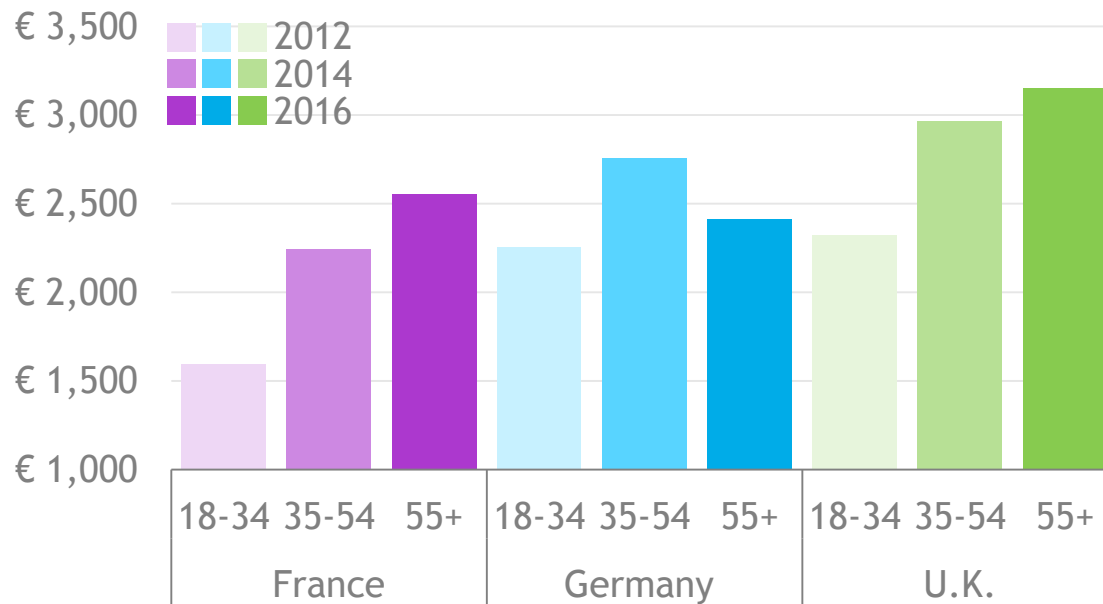
Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's European Consumer Travel Report Sixth Edition



Britons tend to travel more often and spend more on travel than their French and German counterparts.

Average Annual Household
Travel Spend, by Age



U.K. travelers 55+ spent an average €3,152 in the past year, versus €2,556 in France and €2,411 in Germany.

Question: What was the total amount your household spent on travel components (including airline tickets, paid lodging, car rental, cruise tickets, railway tickets for overnight trips) for your N leisure trips in the past year? Enter whole number without currency sign.

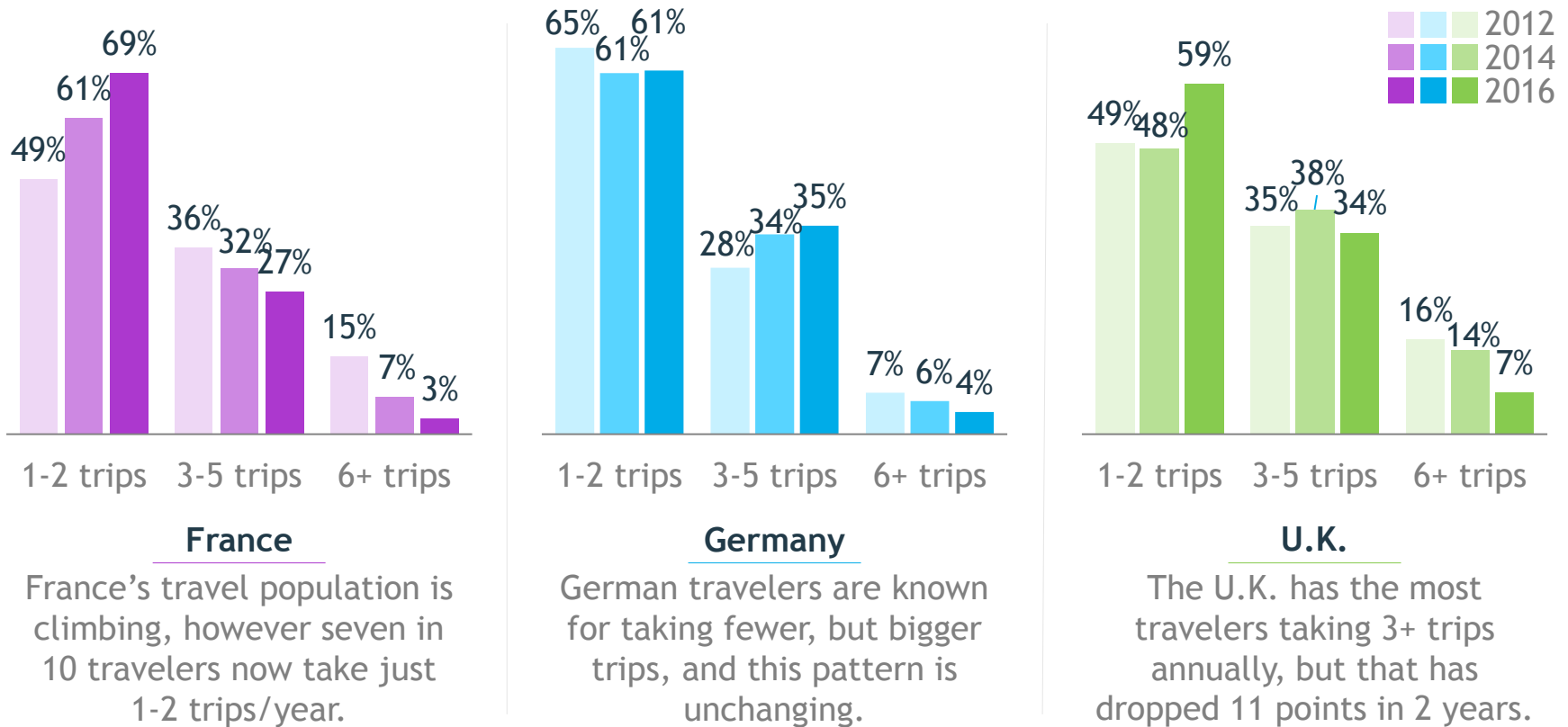
Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's European Consumer Travel Report Sixth Edition



More travelers, but traveling less

Number of Leisure Trips per Year, by Country



Question: In the last 12 months, how many TOTAL leisure trips did you take that included paid accommodations and/or air/rail travel?

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Traveling less, but traveling longer.

French

travelers may be cutting back on the number of trips annually, but they are holding out for bigger and longer excursions. The percentage of quick getaways (3 nights or less) fell 14 points since 2014, and 45% of all trips within the past year lasted at least a week.

Germany

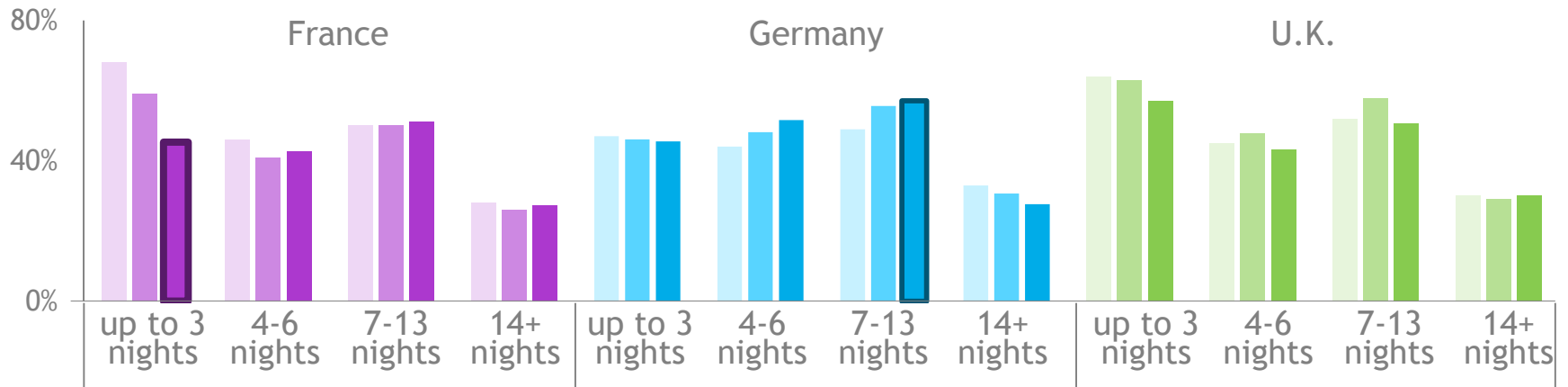
has a stable travel environment. German travelers prefer to take just 1-2 trips annually, but nearly 60% take trips that last one to two weeks.

British

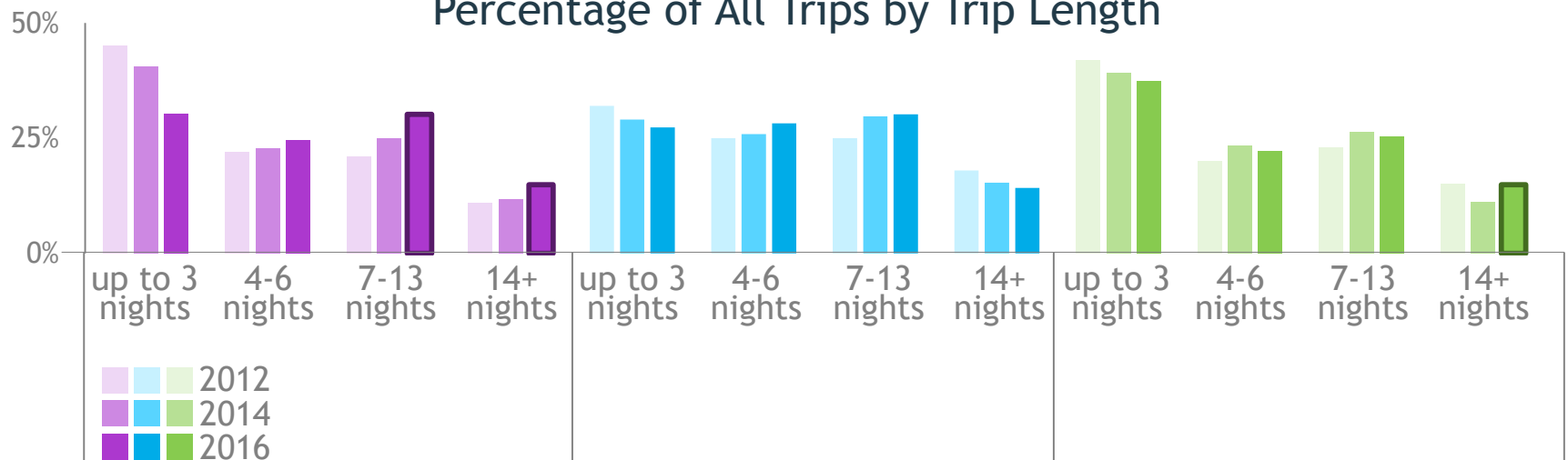
travelers are traveling less often as well, but trip duration is getting longer. The number of trips lasting two weeks or longer received an uptick last year.



Percentage of Travelers by Trip Length



Percentage of All Trips by Trip Length



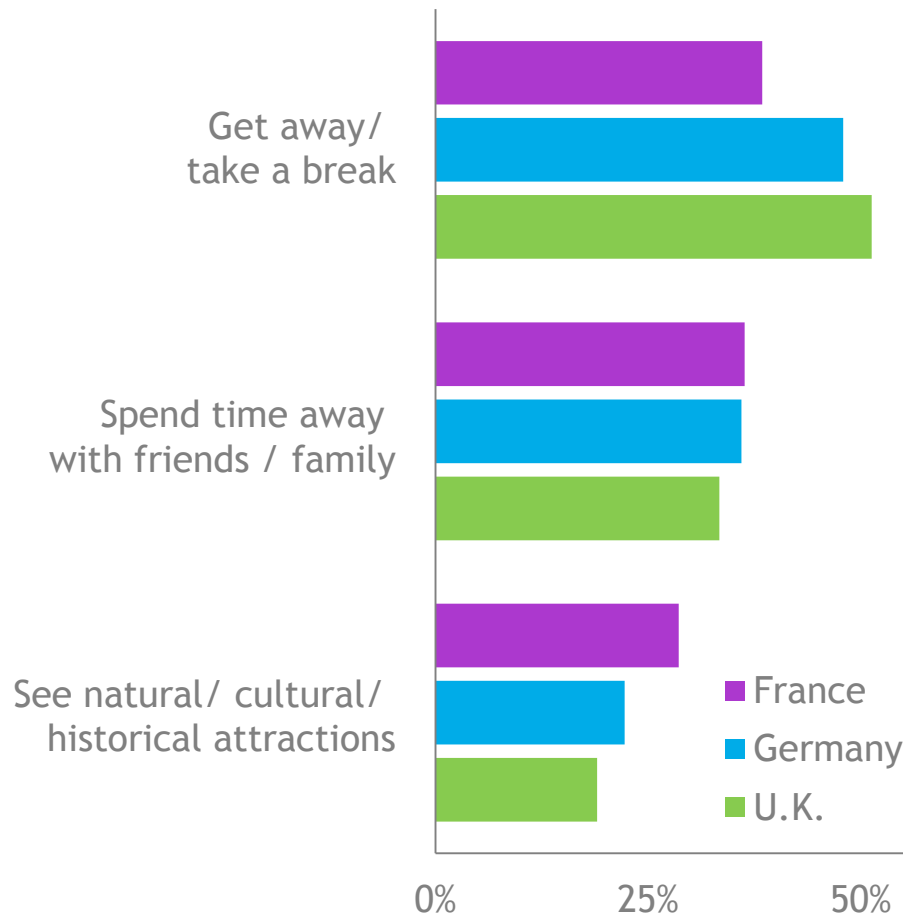
Question: Of the N total leisure trips you took in the past year, how many were:

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Last Trip Motivations



Europeans, like all other travelers, are motivated by the need to take a break and spend time away with family and friends.

But they are also motivated to see **natural, cultural and historical attractions** around the world.

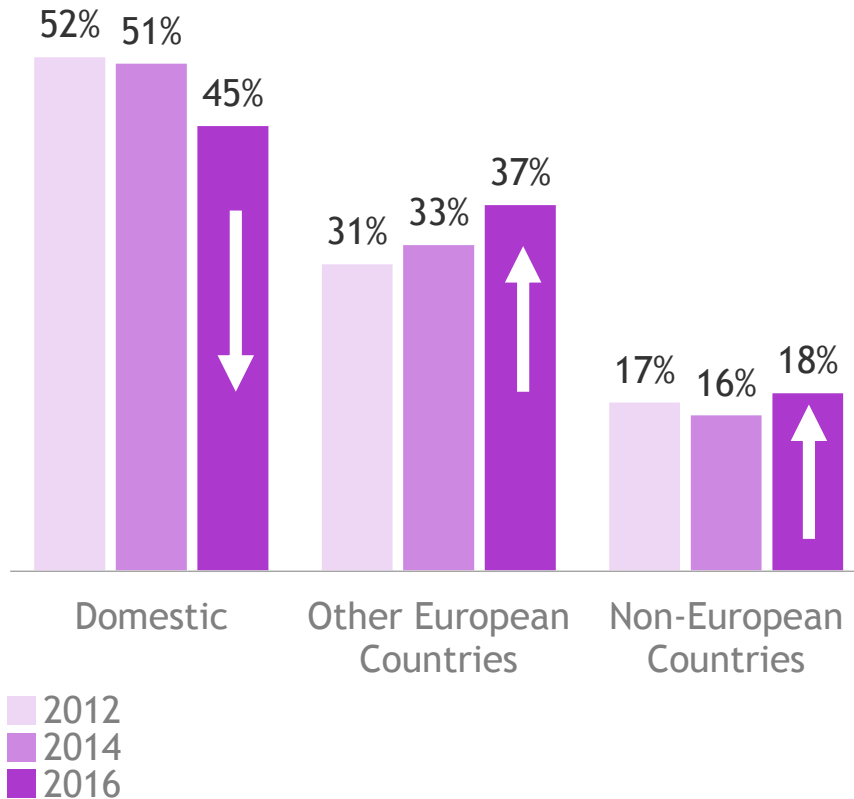
Question: What motivated you to take this trip? *Select all that apply.*

Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Domestic and International Travel (Percentage of All Trips): France



French travelers explored beyond borders.

Even with an abundance of local destinations to choose from, France saw a drop in domestic travel and over half of all trips were taken internationally.

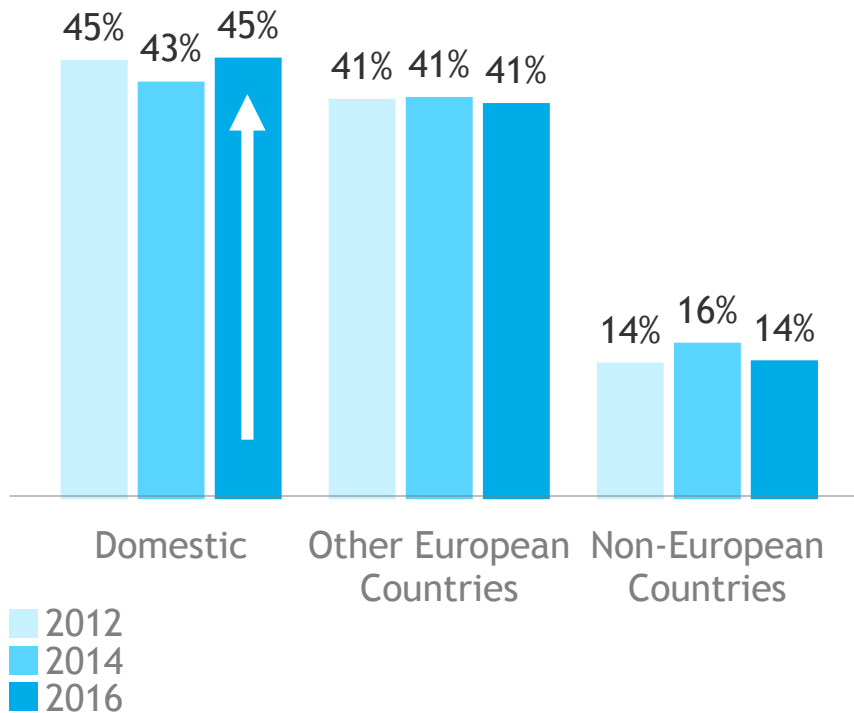
Question: Of the N total leisure trips you took in the past year, how many were:

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Domestic and International Travel (Percentage of All Trips): Germany



**More Germans
traveled within
their home
country.**

However, international destinations still account for more than half of all trips.

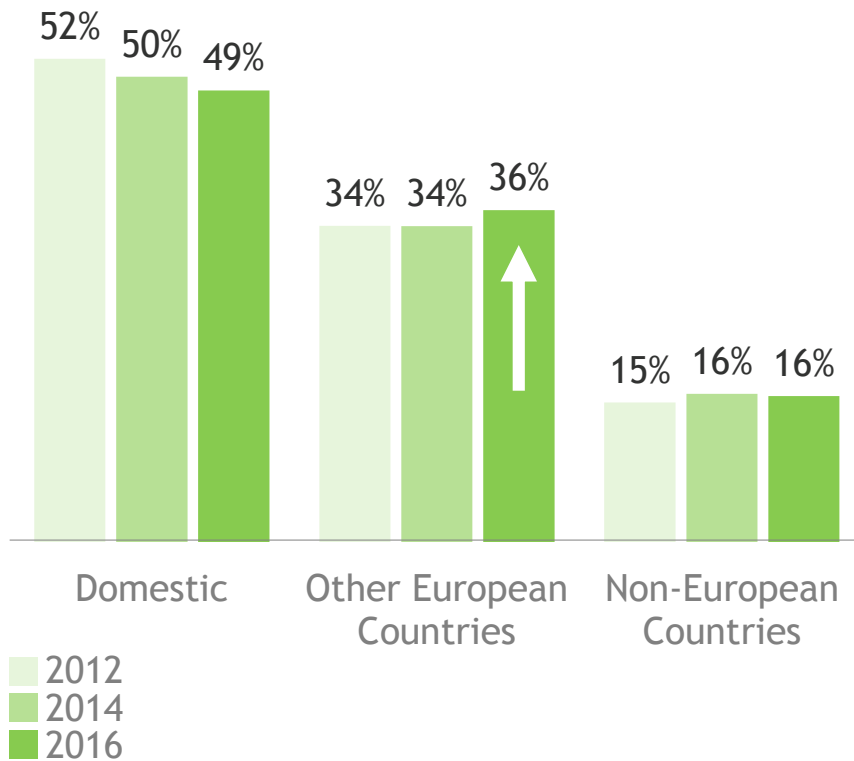
Question: Of the N total leisure trips you took in the past year, how many were:

Base: German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Domestic and International Travel (Percentage of All Trips): U.K.



**U.K. travelers
went abroad as
well.**

Even though short jaunts of three nights or fewer are most popular, over half of British trips were taken to other countries.

Question: Of the N total leisure trips you took in the past year, how many were:

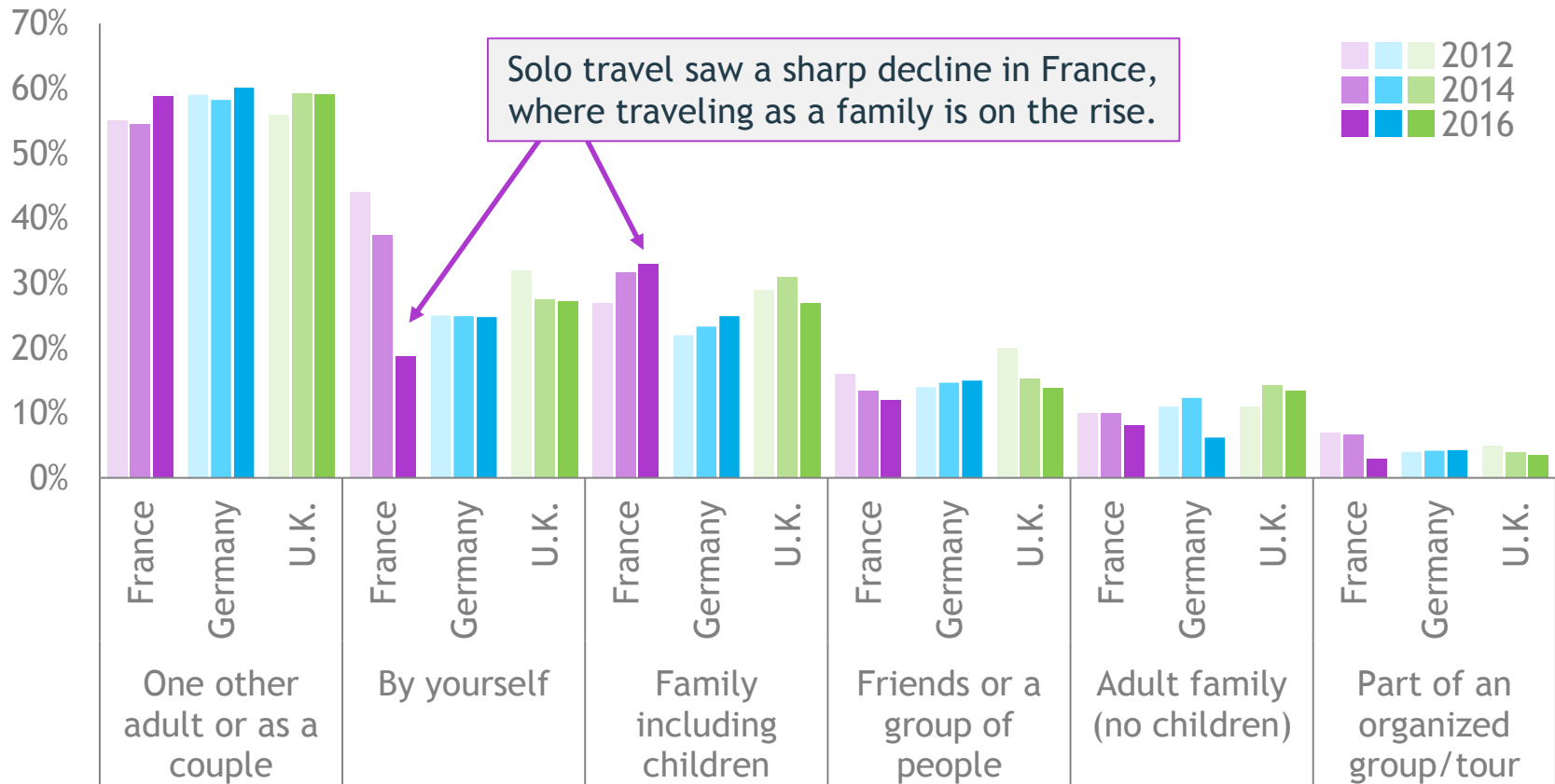
Base: U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Regardless of destination, traveling with another adult or as a couple is consistently the most common way to travel.

Figure 15: Travel Party Composition



Question: Of the N total leisure trips you took in the past year, how many were:

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

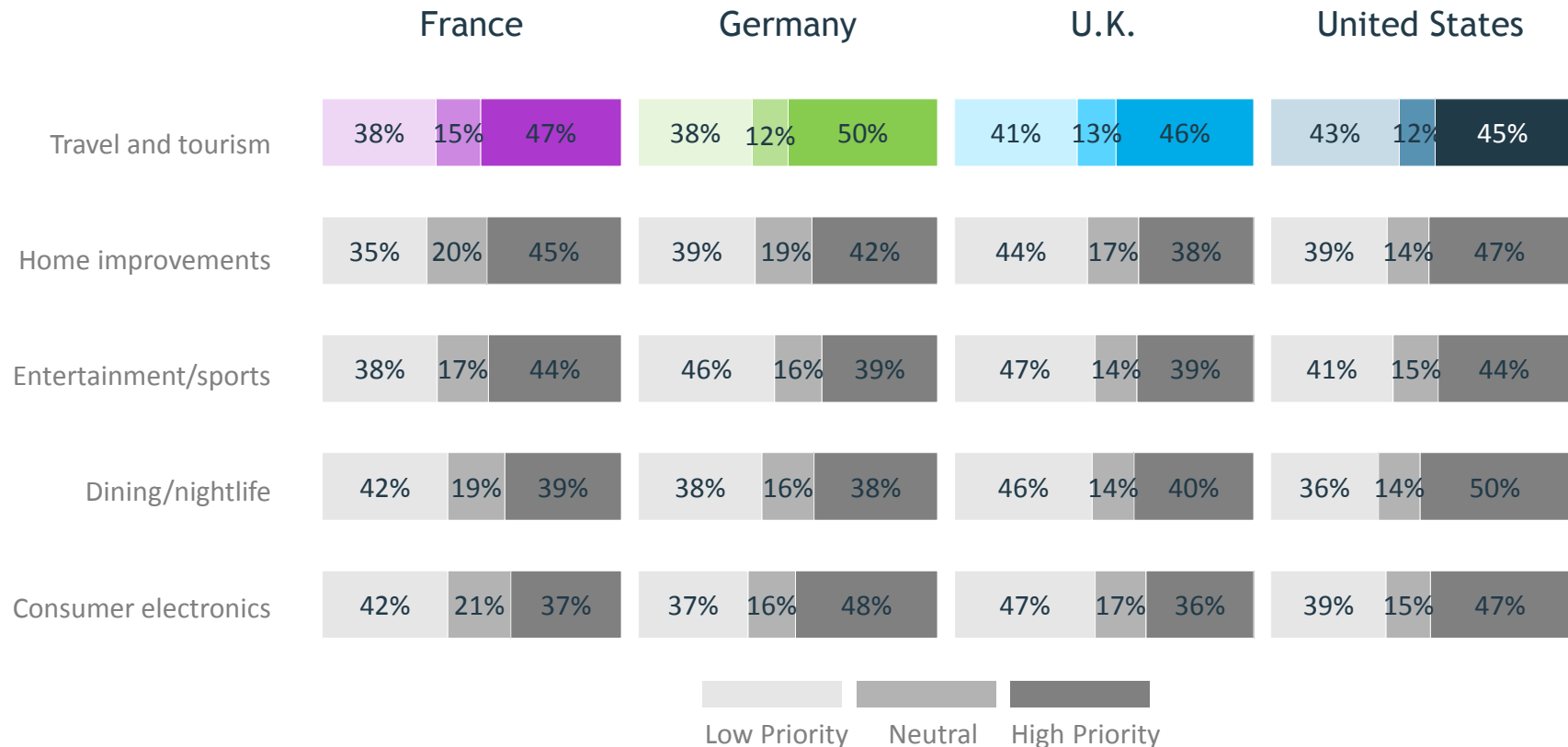
Source: Phocuswright's European Consumer Travel Report Sixth Edition



Although consumers cut back on travel spend, travel and tourism is still **important to the European lifestyle** and remains a **top priority** for discretionary spending.

All three markets place higher priority on travel than the U.S., where travel is ranked fourth.

Discretionary Spending Priorities



Question: When deciding how to spend your discretionary money (after covering everyday living expenses), please assign how much of a priority you place on the following goods or services. Please assign each row a number from 0 to 10, 0 being no priority and 10 being top priority.

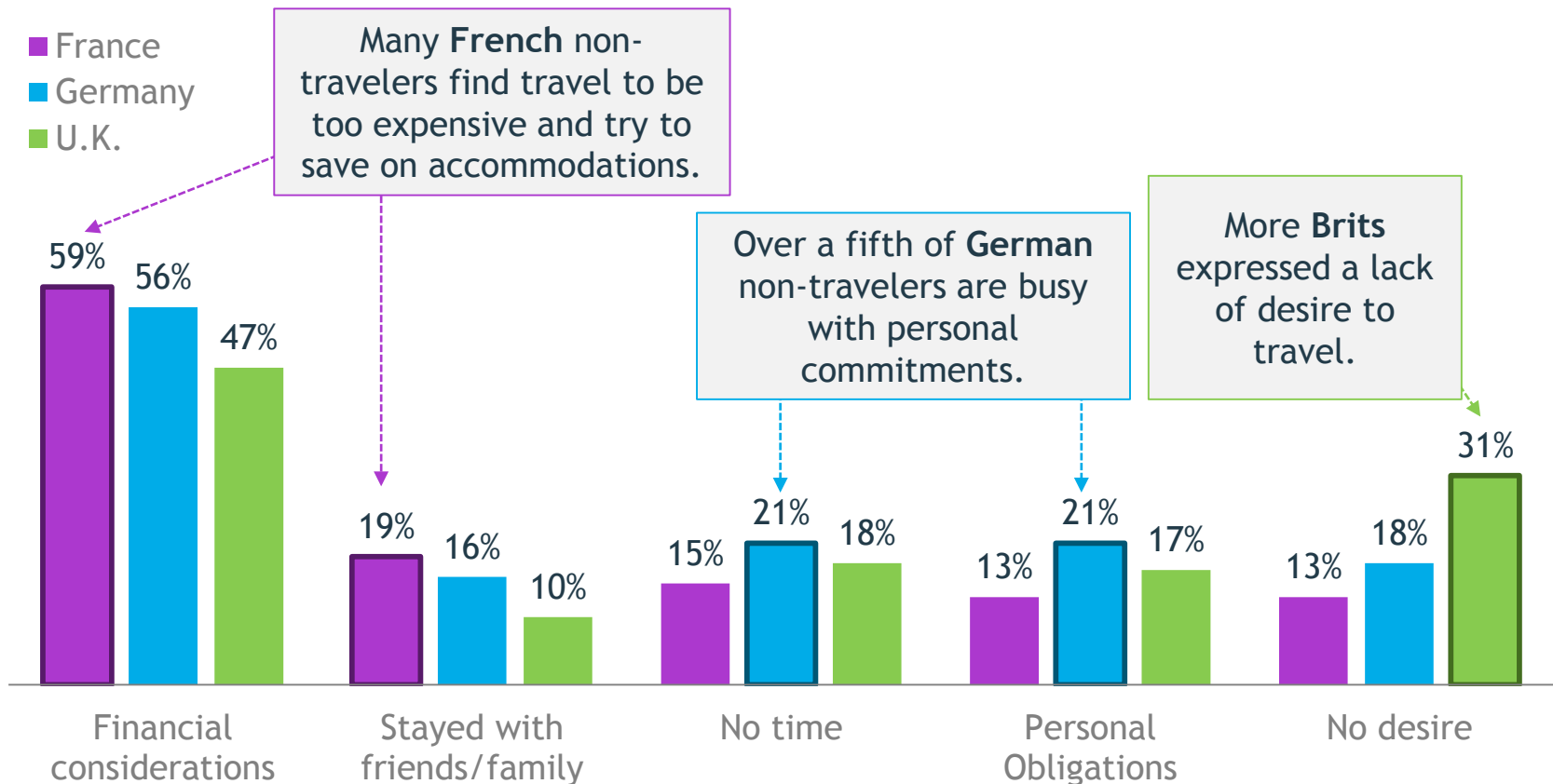
Base: Internet users: France (2016 N=1,935); Germany (2016 N=1,877), U.K. (2016 N=1,924)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*; Phocuswright's *U.S. Consumer Travel Report Eighth Edition*



Inhibitors to travel, however, vary significantly by country.

Reasons for Not Purchasing Travel Products



Question: Which of the following reasons describes why you did not purchase holiday travel (lodging, airline tickets or rail tickets) in the past 12 months? *Select all that apply.*


Base: French non-travelers (N=653), German non-travelers (N=477), U.K. non-travelers (N=582)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*





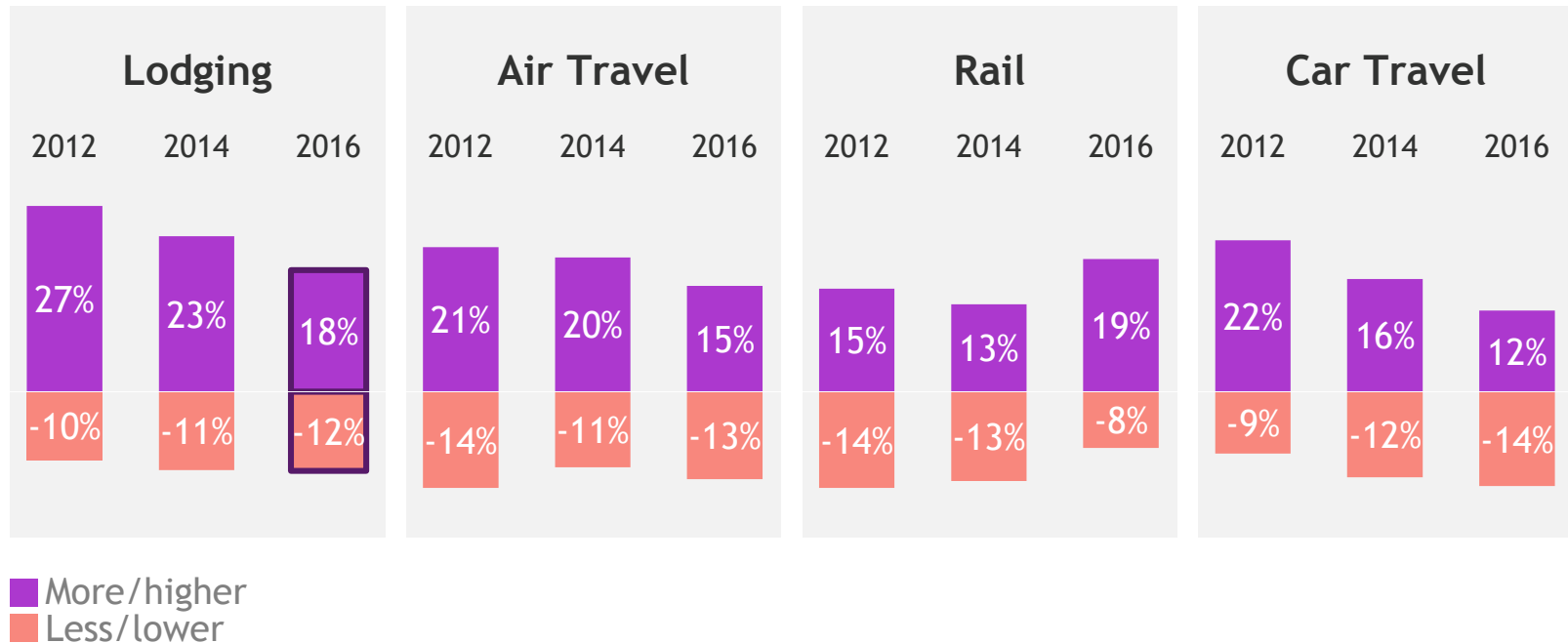
2017 Outlook: Traveler Intentions

A man and a woman are sitting at a table, looking at a tablet and a document. The man is holding the document, and the woman is pointing at the tablet. They are both looking down at the items on the table. In the foreground, there is a bowl of oatmeal with strawberries and a spoon. The background is bright and out of focus.

Amid continuing
economic uncertainty,
intentions for travel
purchases in the
coming year are
very modest.

With an already high lodging rate in France, **fewer French travelers plan to increase accommodation plans** in the next 12 months.

Intentions for Travel Product Consumption: France



Question: What adjustments, if any, do you expect to make to your leisure travel plans over the NEXT 12 months?

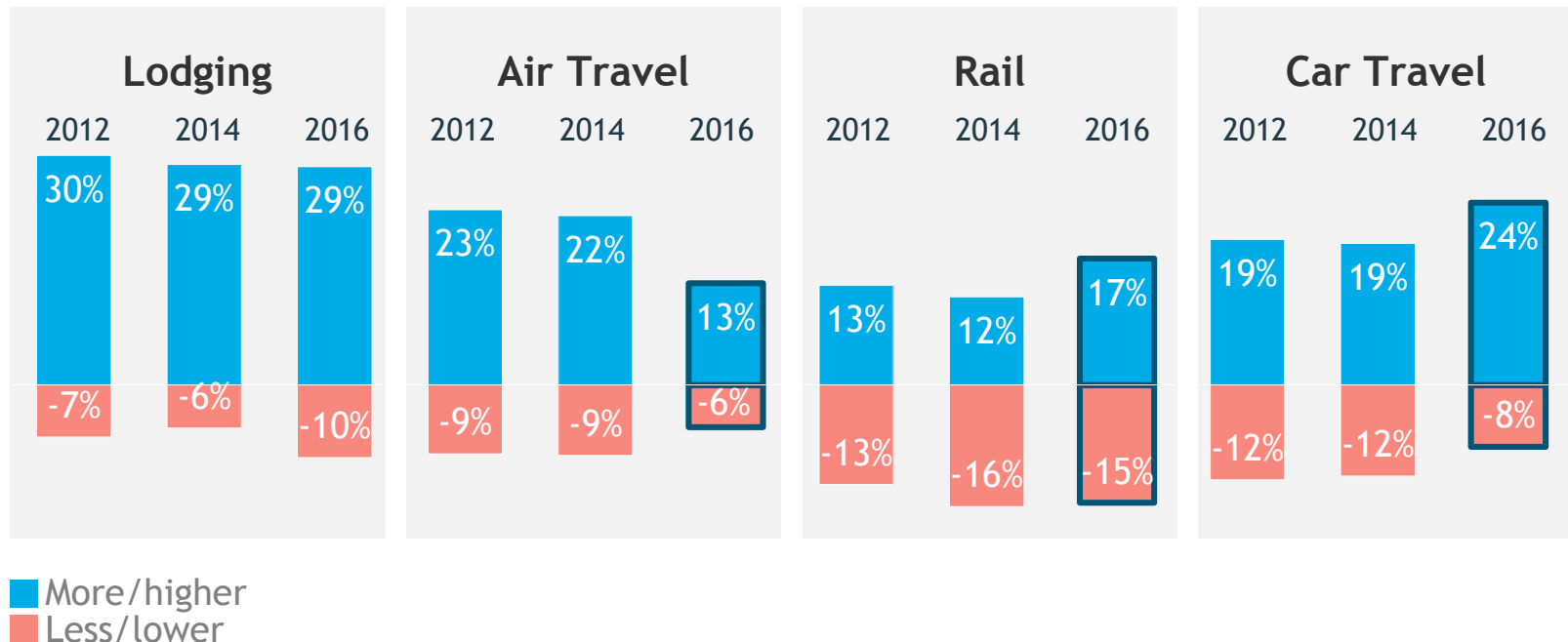
Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Germany is likely to continue seeing more leisure trips close to home, as intentions for air travel are down but rail and car travel received a boost.

Intentions for Travel Product Consumption: Germany



Question: What adjustments, if any, do you expect to make to your leisure travel plans over the NEXT 12 months?

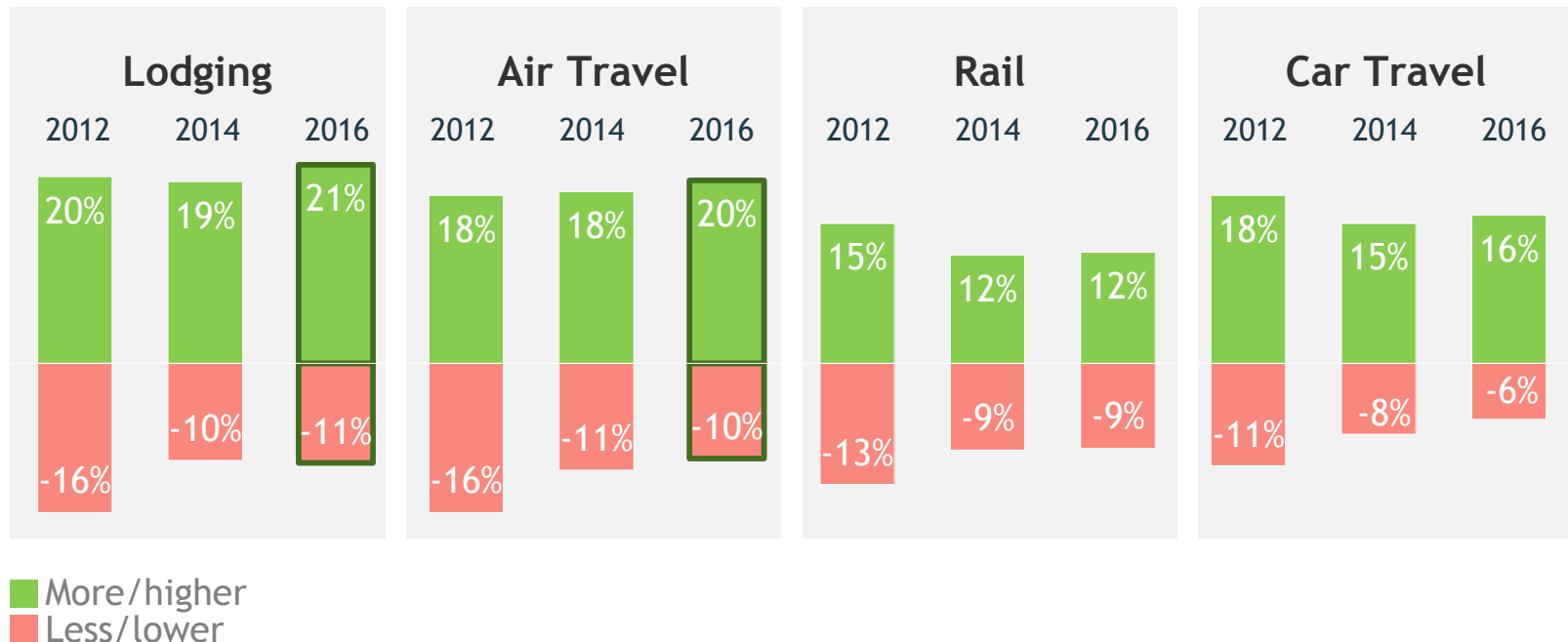
Base: German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



British travelers, who are most likely to purchase complex trips, feel **even more optimistic about lodging and air travel plans for next year.**

Intentions for Travel Product Consumption: U.K.



Question: What adjustments, if any, do you expect to make to your leisure travel plans over the NEXT 12 months?

Base: U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*





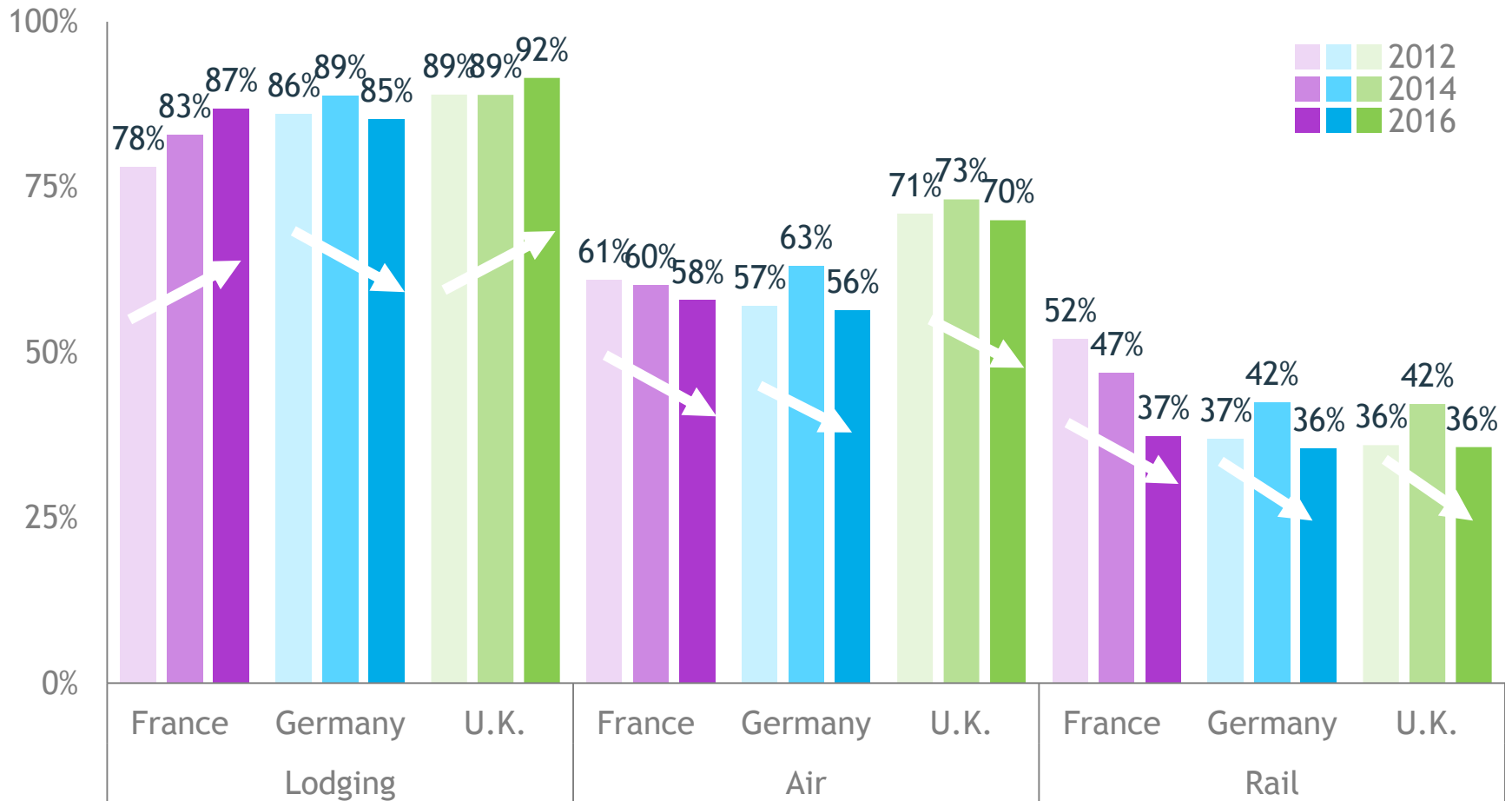
What European Travelers Are Booking/Buying



With travelers spending less on leisure trips, **air and rail transportation took a hit** in all three markets.

Lodging consumption is rising in France and the U.K. to the highest levels in years, but **accommodation preferences are changing** among all travelers.

Lodging, Air, and Rail Usage



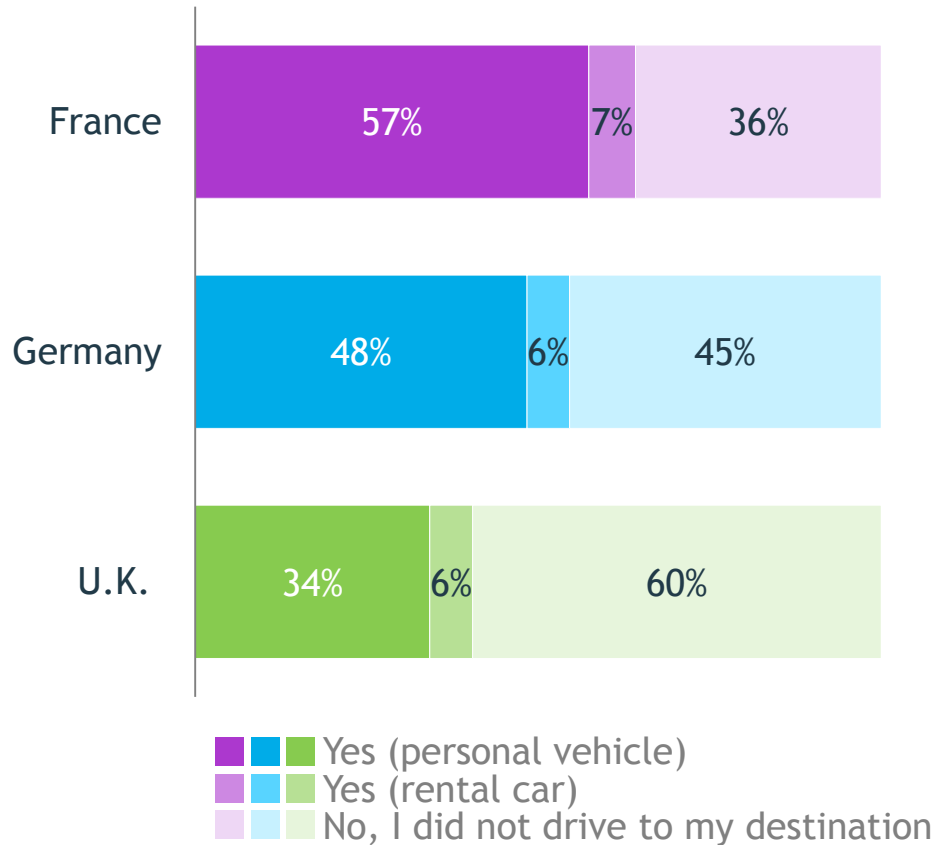
Question: Which of the following, if any, have you done while traveling for leisure in the past 12 months:

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Drive Trips - Travelers Who Drove to Their Destination



Less air and rail means more drive trips. In France, which had the biggest jump in budget travelers, nearly two thirds drove to their last destination.

Question: Did you drive to your travel destination for this trip?

Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

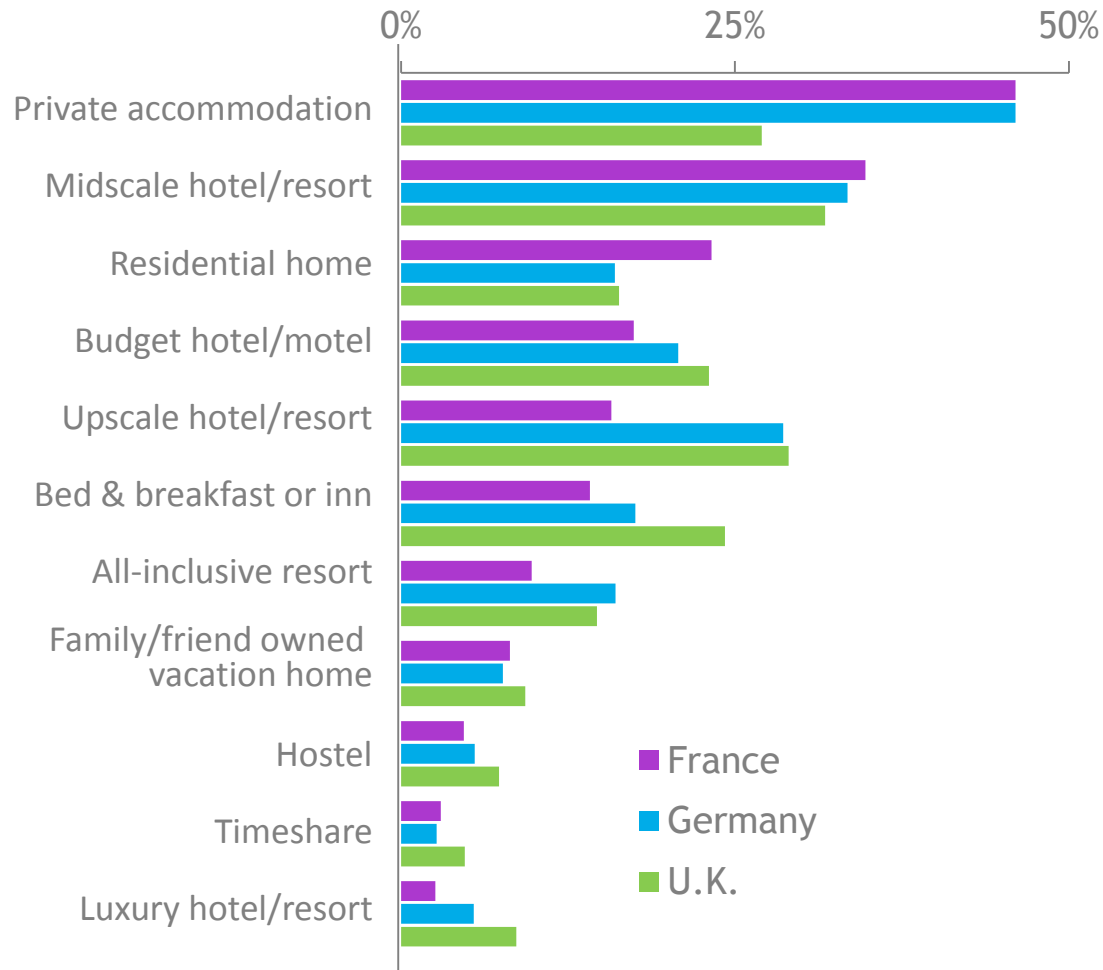
Source: Phocuswright's *European Consumer Travel Report Sixth Edition*





Private accommodation (home, apartment and shared space rentals) has played a big part in the European lodging landscape for many years - more French and German travelers used private accommodation than any other form of lodging. However, private accommodation use in the U.K. has declined.

Percentage of Travelers by Type of Lodging, 2016



Over a third of **French travelers** stayed at midscale hotels. However, all lodging categories dropped within the past year, and staying with friends and family remains a top choice for travelers on a budget.

German travelers prefer a variety of lodging types. While most categories decreased, midscale resorts and B&Bs received a nice boost in the last year.

U.K. travelers shifted away from staying with family and friends and contributed more resources to paid lodging - good news for three- and four-star hotels.

Question: What type of lodging did you use in the past year when traveling for leisure? *Select all that apply.*

Base: French lodging bookers (2016 N= 905); German lodging bookers (2016 N=914); U.K. lodging bookers (2016 N=957)

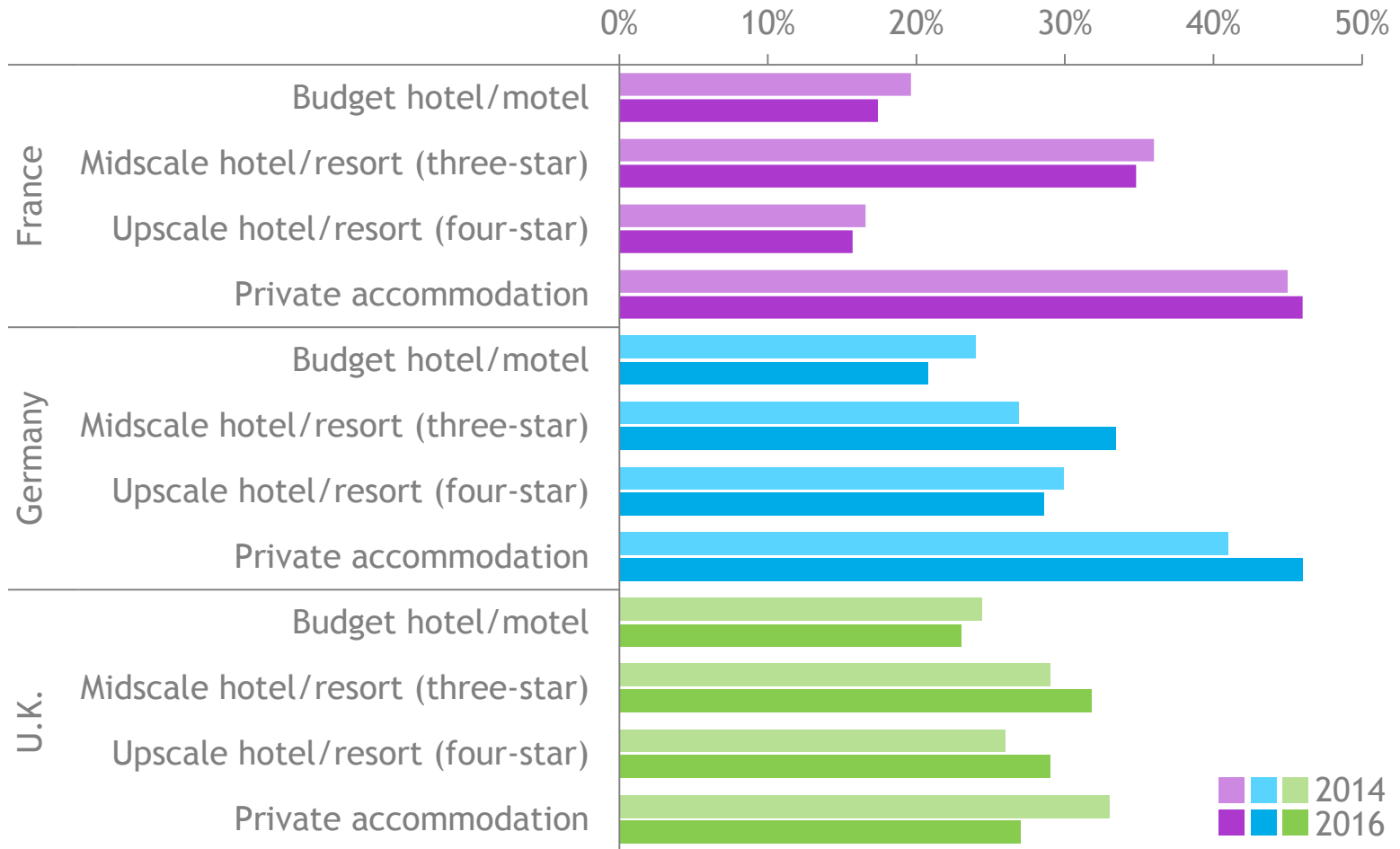
Source: Phocuswright's *European Consumer Travel Report Sixth Edition*





But the rise of rentals, combined with the declining euro and a still shaky regional economy, may now bigger increasingly impact traditional lodging options. In France and Germany, hotel use has mostly slipped as more travelers use private accommodation.

Shifts in Use of Hotels and Private Accommodation



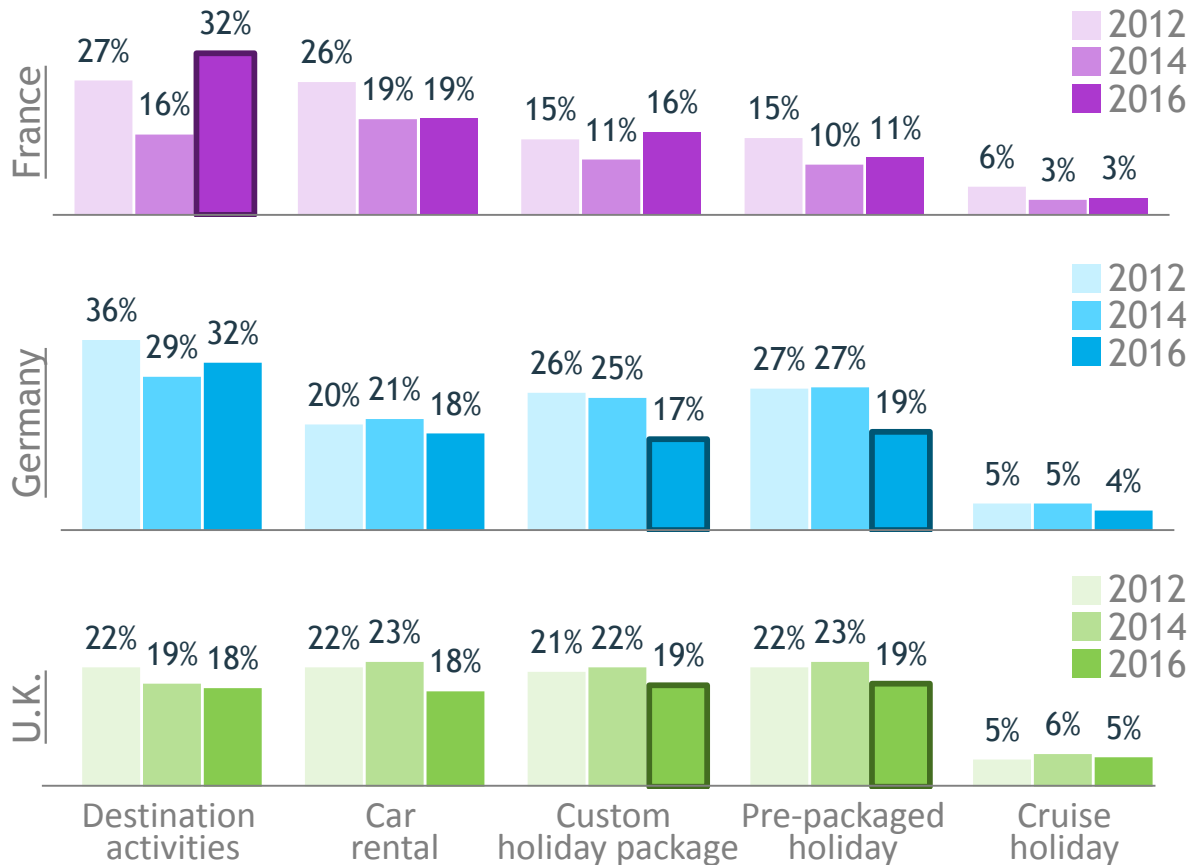
Question: What type of lodging did you use in the past year when traveling for leisure? *Select all that apply.*

Base: French travelers (N=1,042); German travelers 2016 N=1,071); U.K. travelers (2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Travel Purchasing: Car Rental, Packages, Cruises and Activities



Destination activity use has doubled in France, most likely from the increase in travelers heading abroad and experiencing new destinations.

As travelers tighten their belts, bookings of packaged travel have slipped.

Question: Which of the following travel components, if any, did you book for your N leisure trips taken in the past year? *Select all that apply.*


Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Planning & Shopping



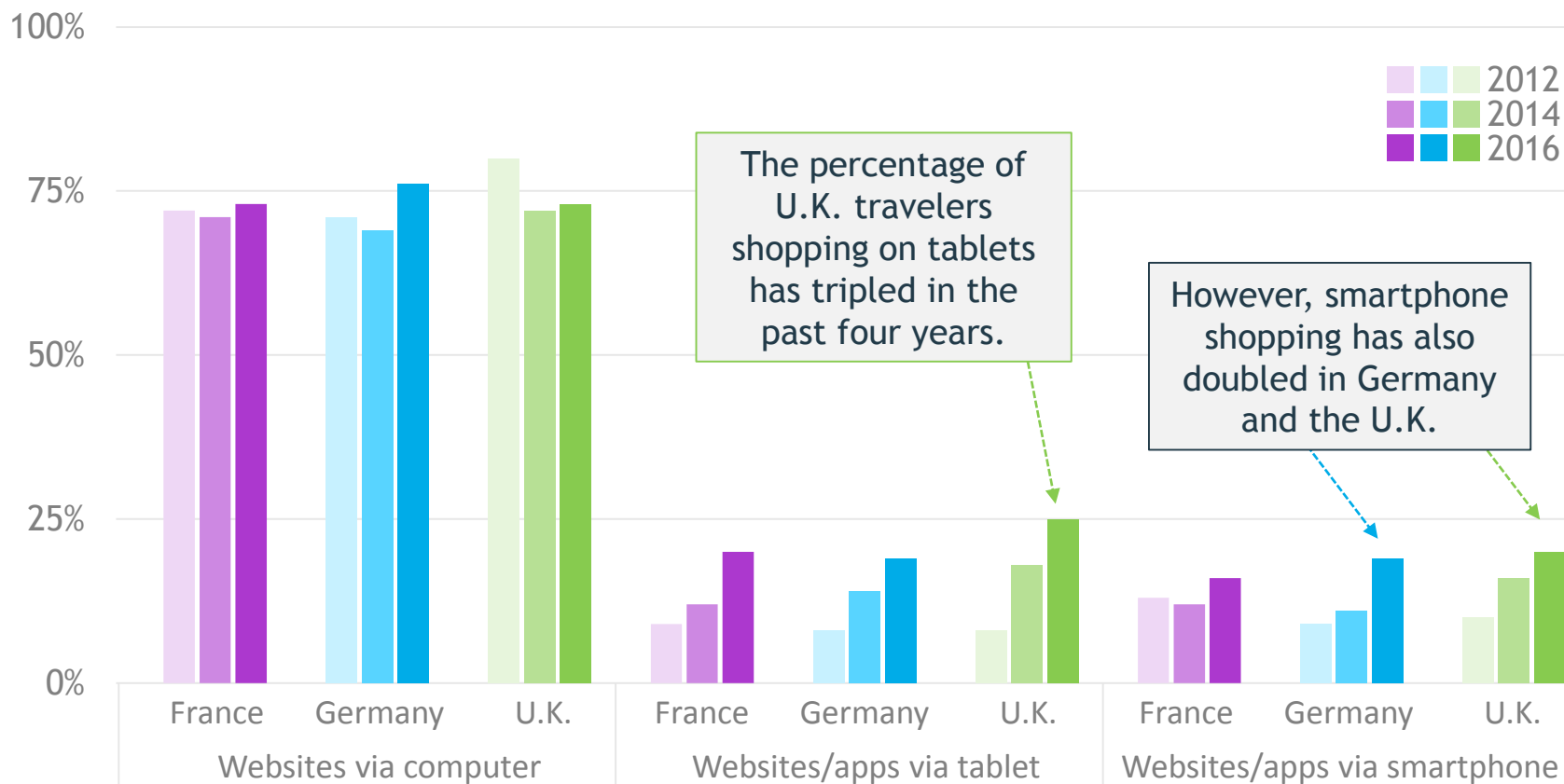
A person is shown from the chest down, holding a smartphone in their right hand and a coffee cup in their left. They are wearing a white tank top. The background is blurred, suggesting an outdoor setting. The text is overlaid on the left side of the image.

Digital channels - desktops,
mobile devices - have become
the mainstay of European
travel planning. Travel
companies must continuously
strive to improve the online
experience for consumers
increasingly on the go.

Amid mobile's rapid rise,
however, desktop use has
remained stable.

Tablets are the fastest growing device used for comparing travel products.

Devices Used in Shopping Phase



Question: What sources of information do you typically use when comparing and choosing leisure travel products, such as airline tickets or hotel rooms? *Select all that apply.*

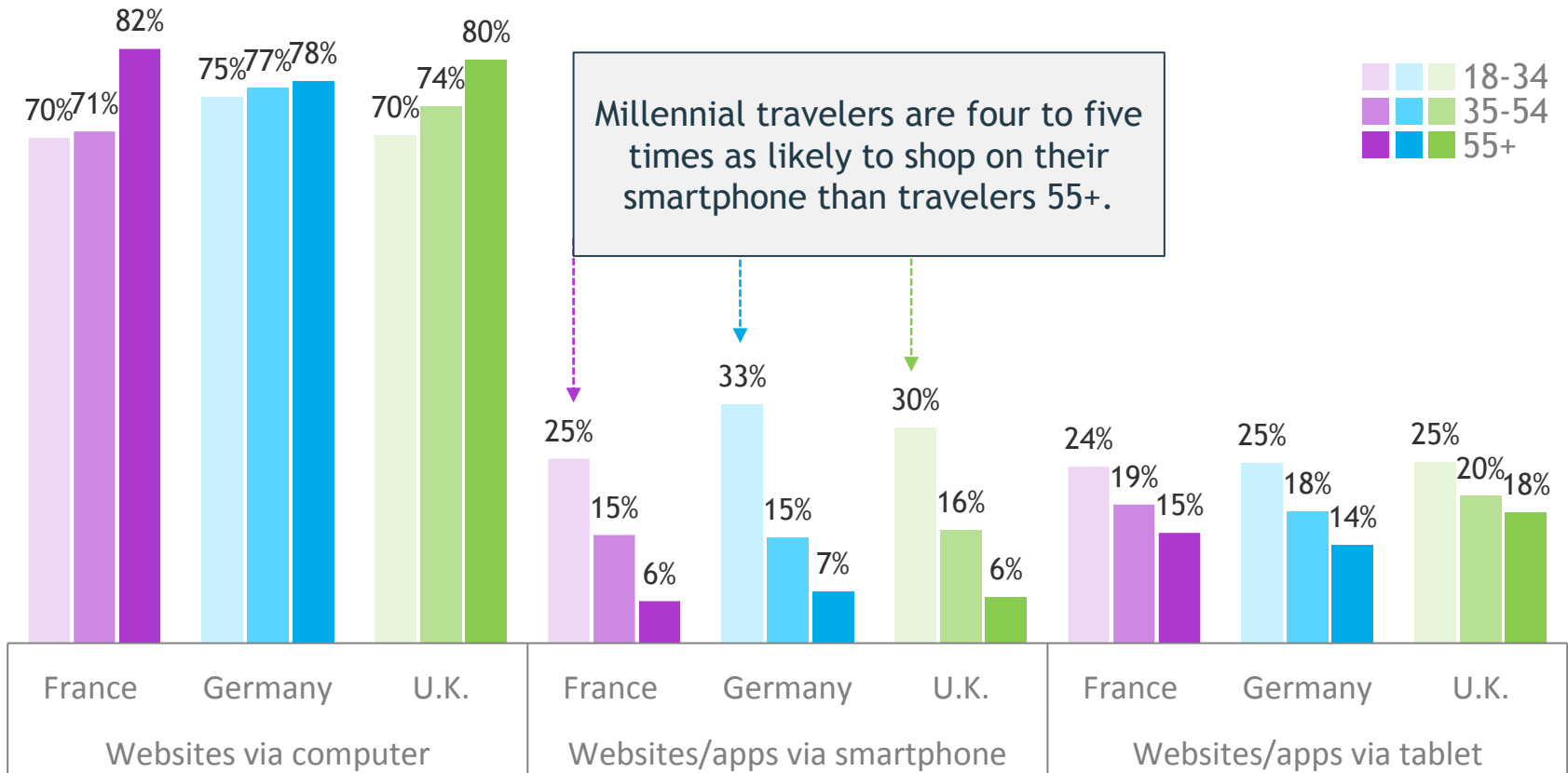
Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Younger travelers are the driving force behind the rise of mobile and defining traveler behavior on those devices.

Devices Used in Shopping Phase, by Age



Question: What sources of information do you typically use when comparing and choosing leisure travel products, such as airline tickets or hotel rooms?
Select all that apply.

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*

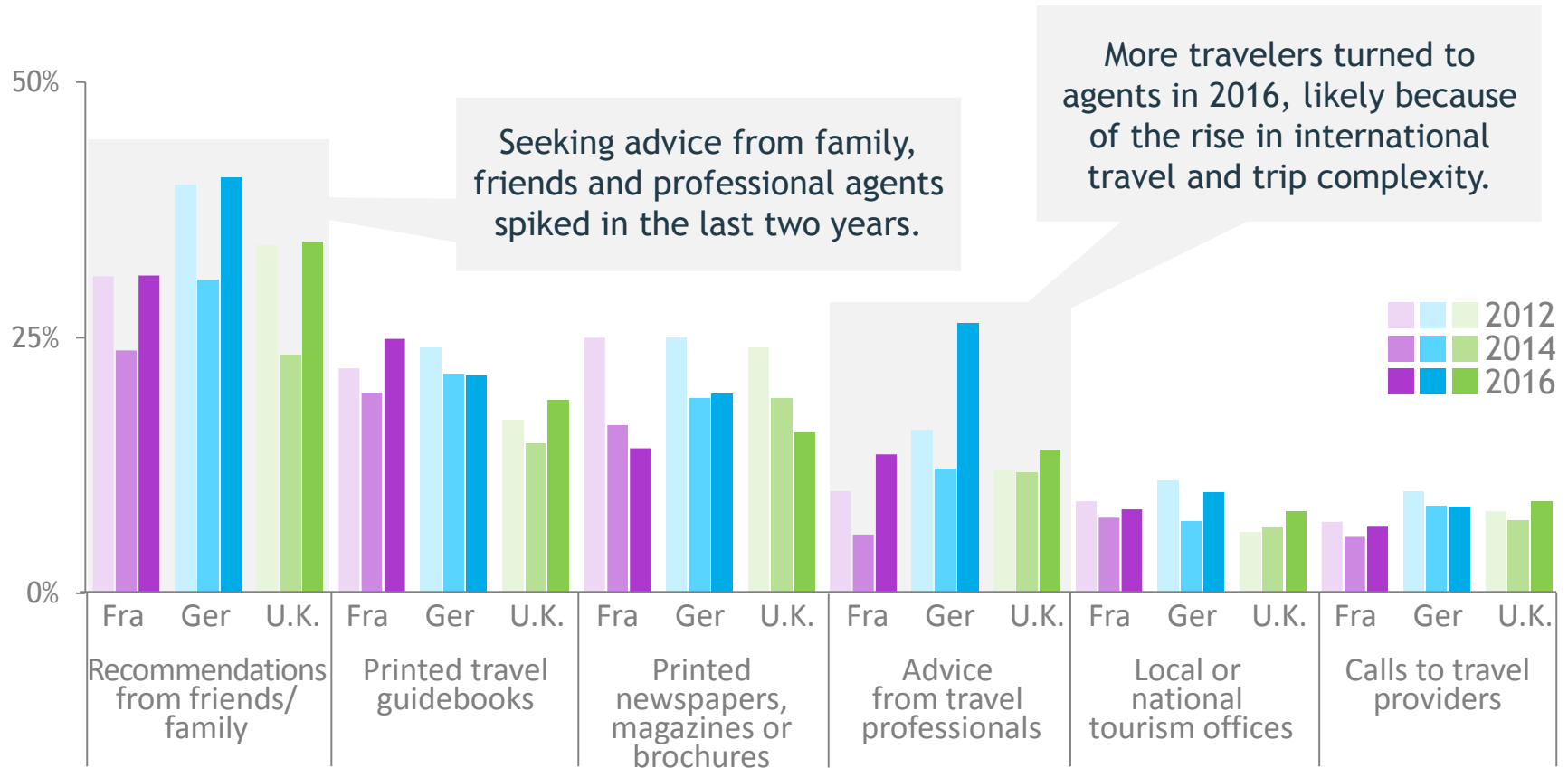


Offline travel planning, however, continues to play an important role.

After cutting back in 2014, more leisure travelers are gathering information from traditional offline sources, likely because of the rise in trips outside of their home countries. Increased trip complexity typically drives higher use of travel agents.



Offline Sources Used in Shopping Phase



Question: What sources of information do you typically use when comparing and choosing leisure travel products, such as airline tickets or hotel rooms? *Select all that apply.*

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*

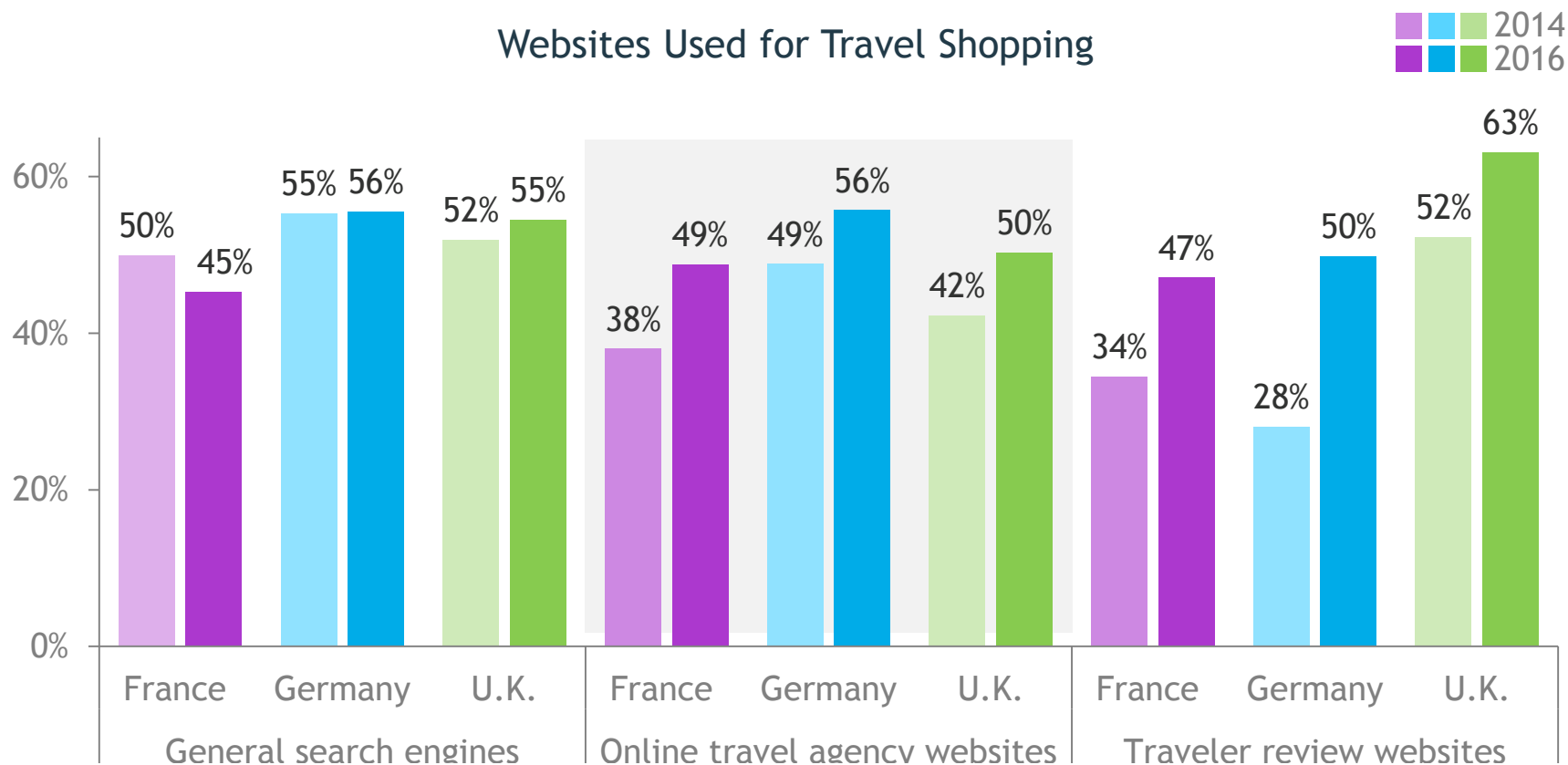


When it comes to shopping for travel products online, consumers have many sources to choose from.

Use of OTAs - online travel agencies - surged in 2016 across Europe, along with traveler review sites such as TripAdvisor.

OTAs surged in each market, becoming the top choice for travel shopping in France and Germany.

Websites Used for Travel Shopping



Question: What type(s) of websites do you typically use when comparing and choosing leisure travel products? *Select all that apply.*

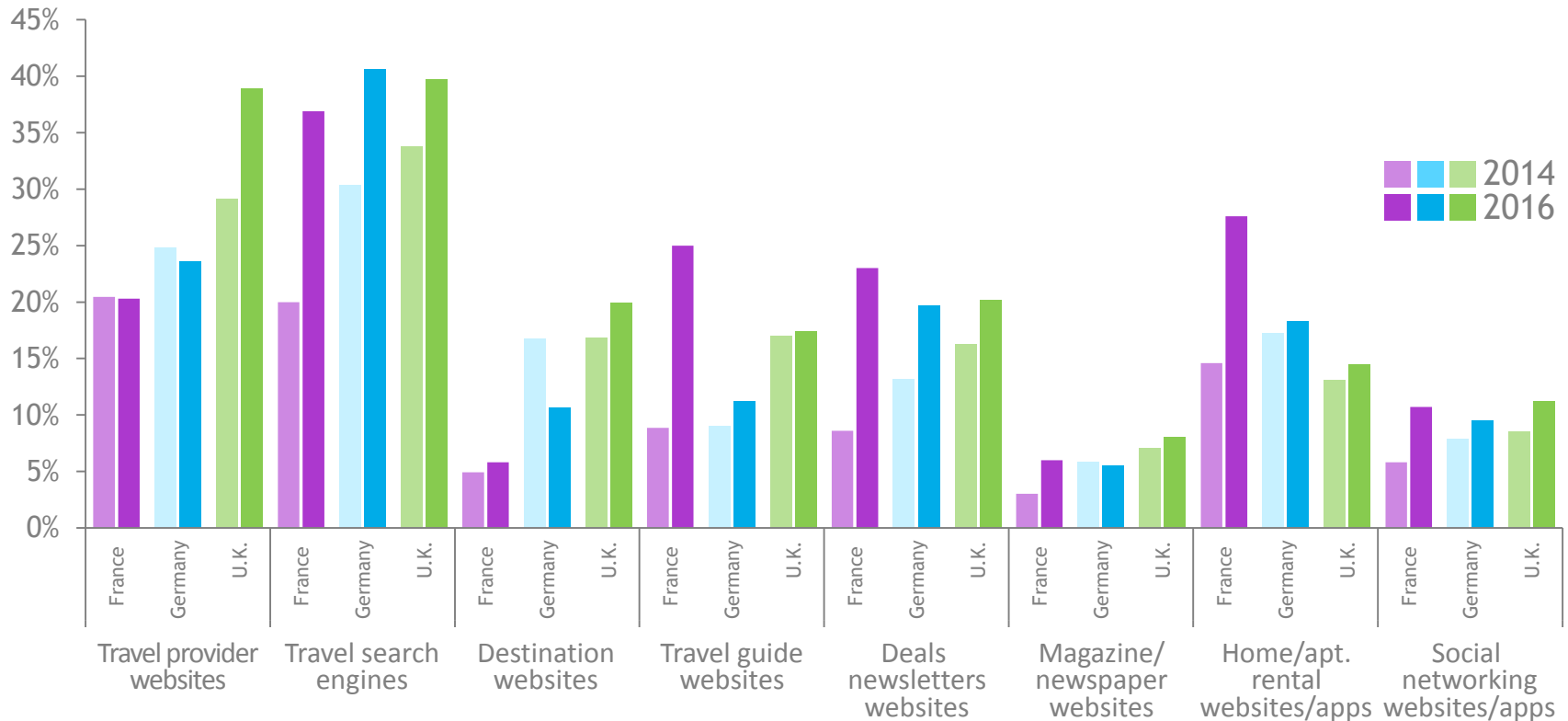
Base: Online travel shoppers: French travelers (2014 N=886, 2016 N=853); German travelers (2014 N=995, 2016 N=886); U.K. travelers (2014 N=853, 2016 N=878)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



However, all types of travel websites received a boost across all markets.

Websites Used in Shopping Phase

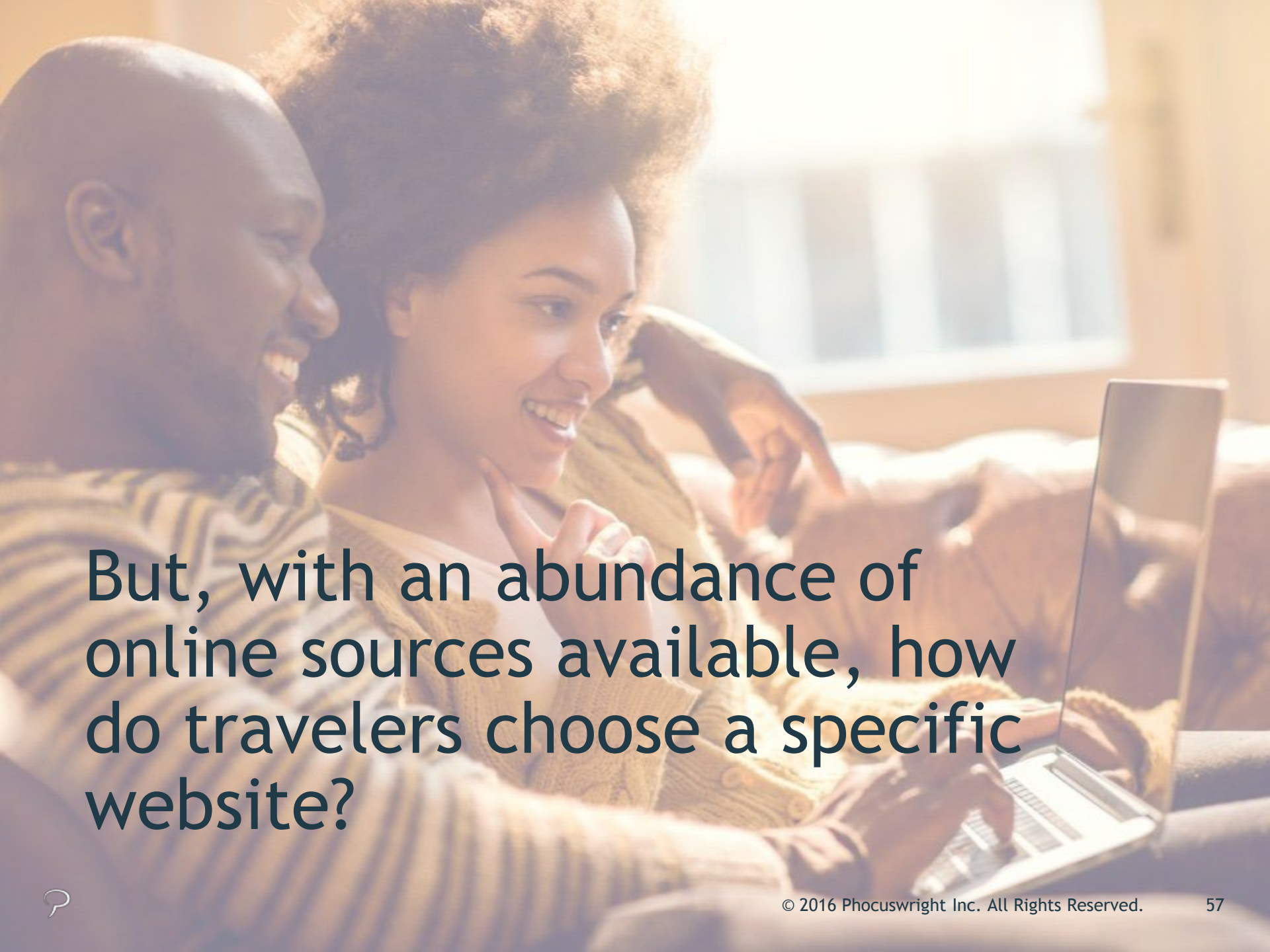


Question: What type(s) of websites do you typically use when comparing and choosing leisure travel products? *Select all that apply.*

Base: Online travel shoppers: French travelers (2014 N=886, 2016 N=853); German travelers (2014 N=995, 2016 N=886); U.K. travelers (2014 N=853, 2016 N=878)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*

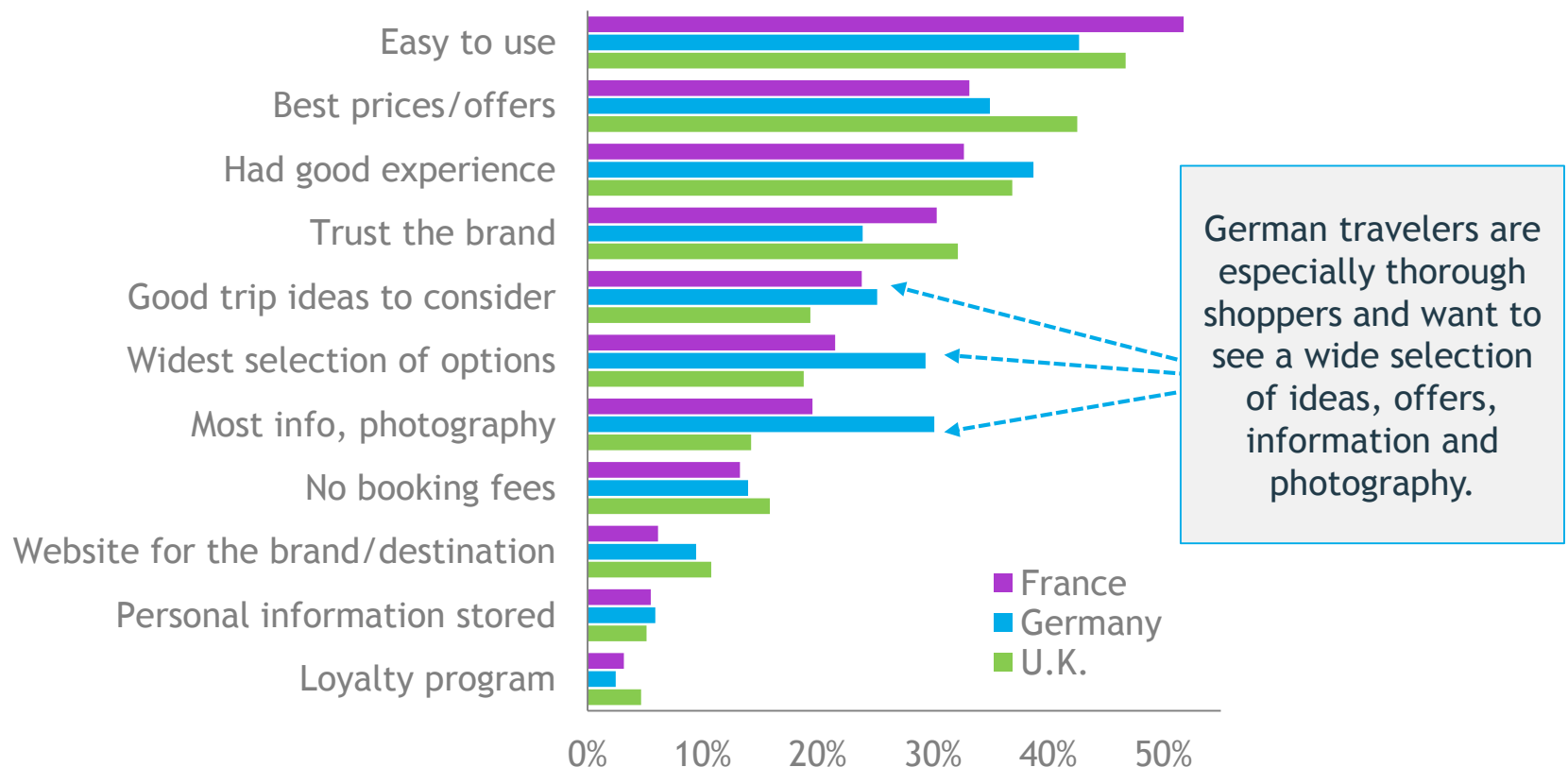


A warm, golden-hour photograph of a man and a woman sitting together, looking at a laptop. The woman is pointing at the screen while the man looks on with a smile. The background is softly blurred, showing a window with light streaming in.

But, with an abundance of online sources available, how do travelers choose a specific website?

Ease of use, best prices and brand trust and experience drive site selection.

Drivers of Website Selection



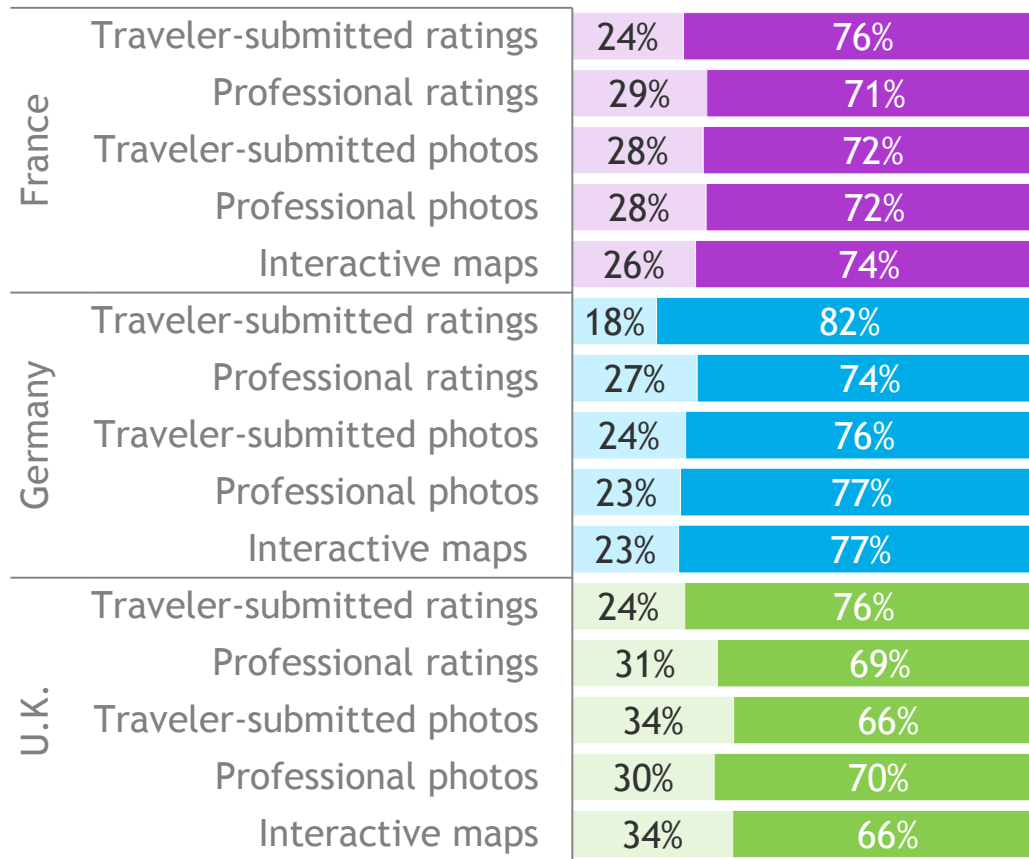
Question: Why did you choose the particular website(s) you used? *Select all that apply.*

Base: LAST TRIP online shoppers: French travelers (2016 N=703); German travelers (2016 N=734); U.K. travelers (2016 N=766)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Importance of Online Features During Travel Shopping



Ratings and reviews from other travelers sway decisions for over three quarters of travelers. Professional reviews and photos, along with interactive maps, are also close behind.

Did not use/Not important

 Important

Question: How important were each of the following online features in helping you make travel purchases? Please rate each on a scale of 1 to 5, from did not use/not important at all

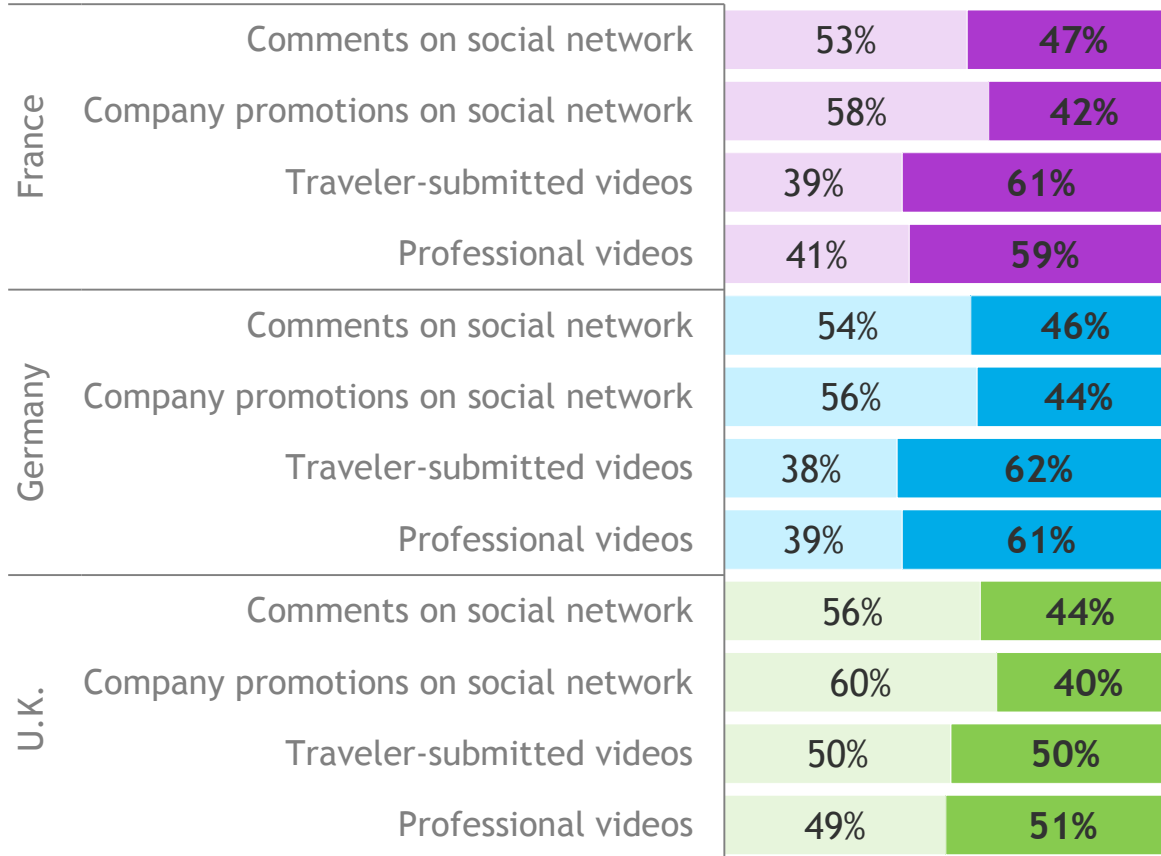
Base: French travelers (N=1,042); German travelers (N=1,071); U.K. travelers (N=1,046)

Note: Totals may not add to 100% due to rounding.

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Importance of Online Features During Travel Shopping



Information on social networks, whether from travel companies or other users, has the least influence on travel decisions.

Did not use/Not important
Important

Question: How important were each of the following online features in helping you make travel purchases? Please rate each on a scale of 1 to 5, from did not use/not important at all

Base: French travelers (N=1,042); German travelers (N=1,071); U.K. travelers (N=1,046)

Note: Totals may not add to 100% due to rounding.

Source: *Phocuswright's European Consumer Travel Report Sixth Edition*

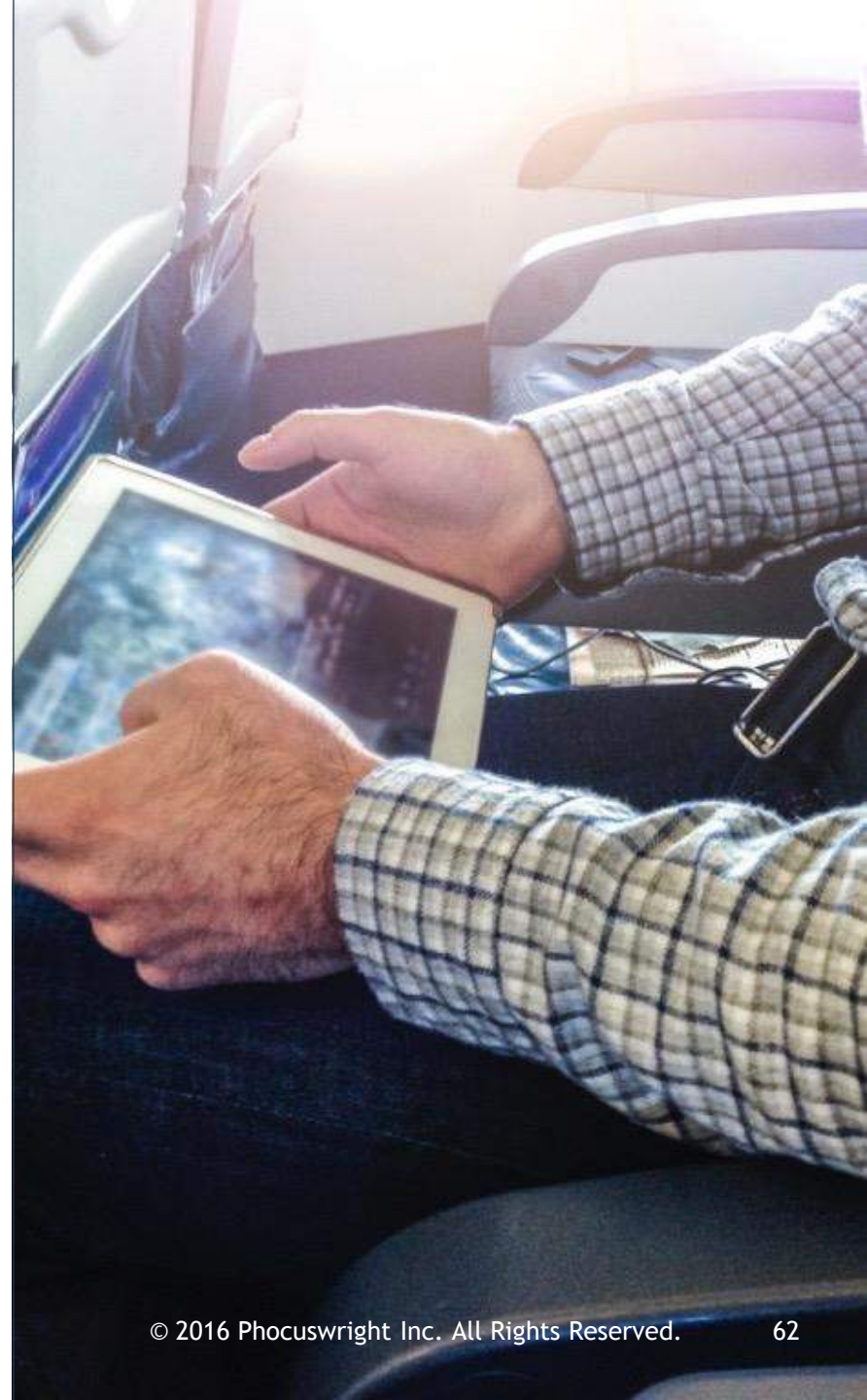


Booking

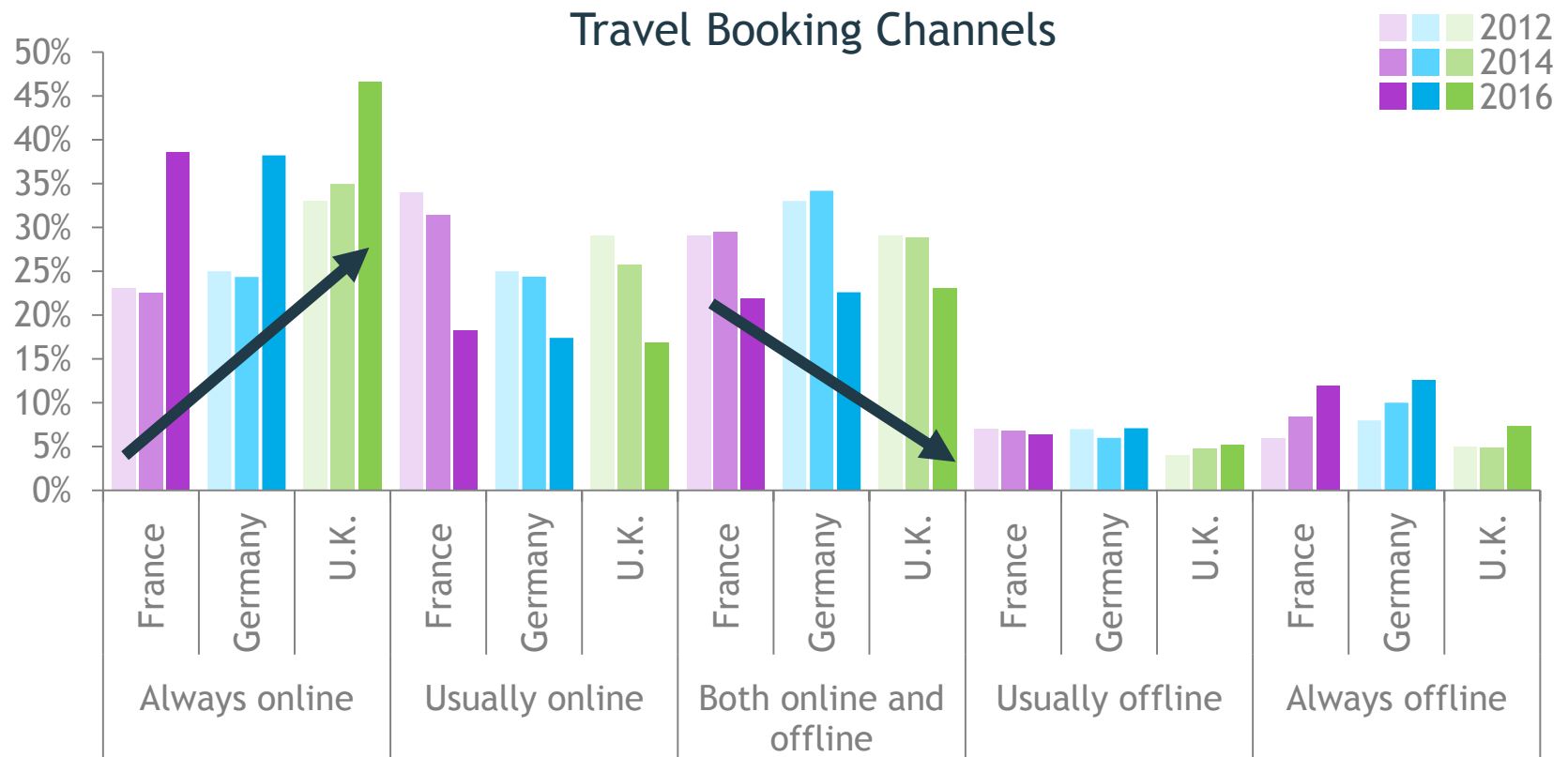


European travelers have historically chosen a mix of online and offline sources to book their travel plans.

However, this past year saw a **huge shift** to booking through a single channel - and **online bookings spiked**. This change is good news for online travel agencies.



The share of travelers that booked solely online jumped by double digits.



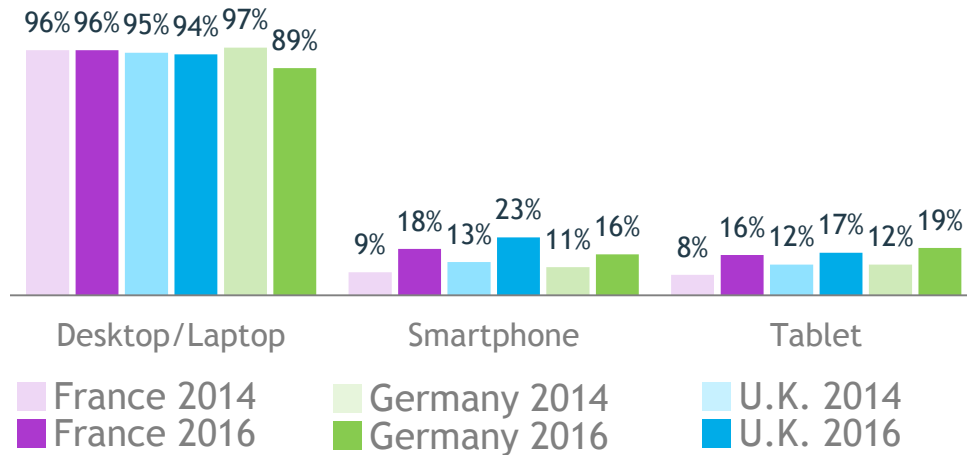
Question: How did you book your N leisure trips in the past 12 months? *Select one. Offline refers to booking via telephone or in person; online refers to booking via the Internet on a computer or mobile device.*

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

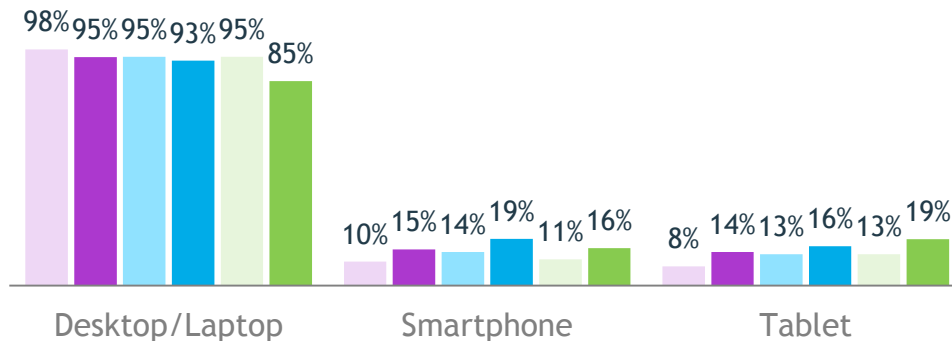
Source: Phocuswright's European Consumer Travel Report Sixth Edition



Devices Used to Book Air Online



Devices Used to Book Hotels Online



Mobile devices are gaining ground for online air and hotel bookings while desktop/laptop slips (especially in the U.K.)

Question: What devices did you use to book airline tickets / hotels online in the past 12 months. *Select all that apply.*

Base: European travelers who purchased an airline ticket online: France (2014 N=291, 2016 N= 360); Germany (2014 N=366, 2016 N=303); U.K. (2014 N=442, 2016 N=428). European travelers who purchased a hotel ticket online: France (2014 N=336, 2016 N=434); Germany (2014 N=465, 2016 N=430); U.K. (2014 N=510, 2016 N=560)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*

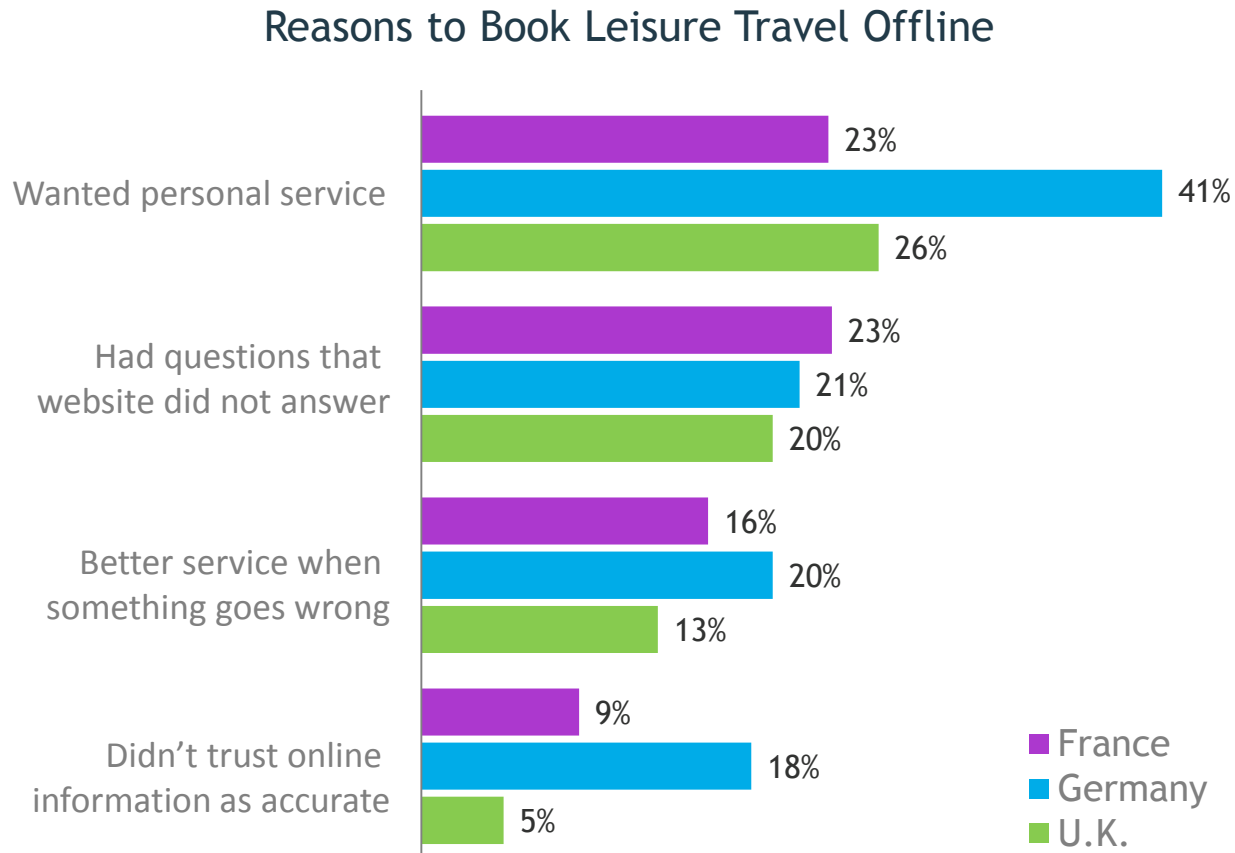


A woman in a travel agency, wearing a white shirt and a dark vest, is pointing at a brochure held by a man and a woman. The man and woman are looking at the brochure with interest. The background is a blurred office or travel agency setting.

For travelers who turn away
from online channels,
personal service is the top
reason to book offline.



Many German travelers value human interaction and place great importance on customer service.



Question: Why did you book some or all of your travel offline (not using the Internet)? *Please select all that apply.*

Base: Offline bookers: France (2016 N=633); Germany (2016 N=658); U.K. travelers (2016 N=572)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*

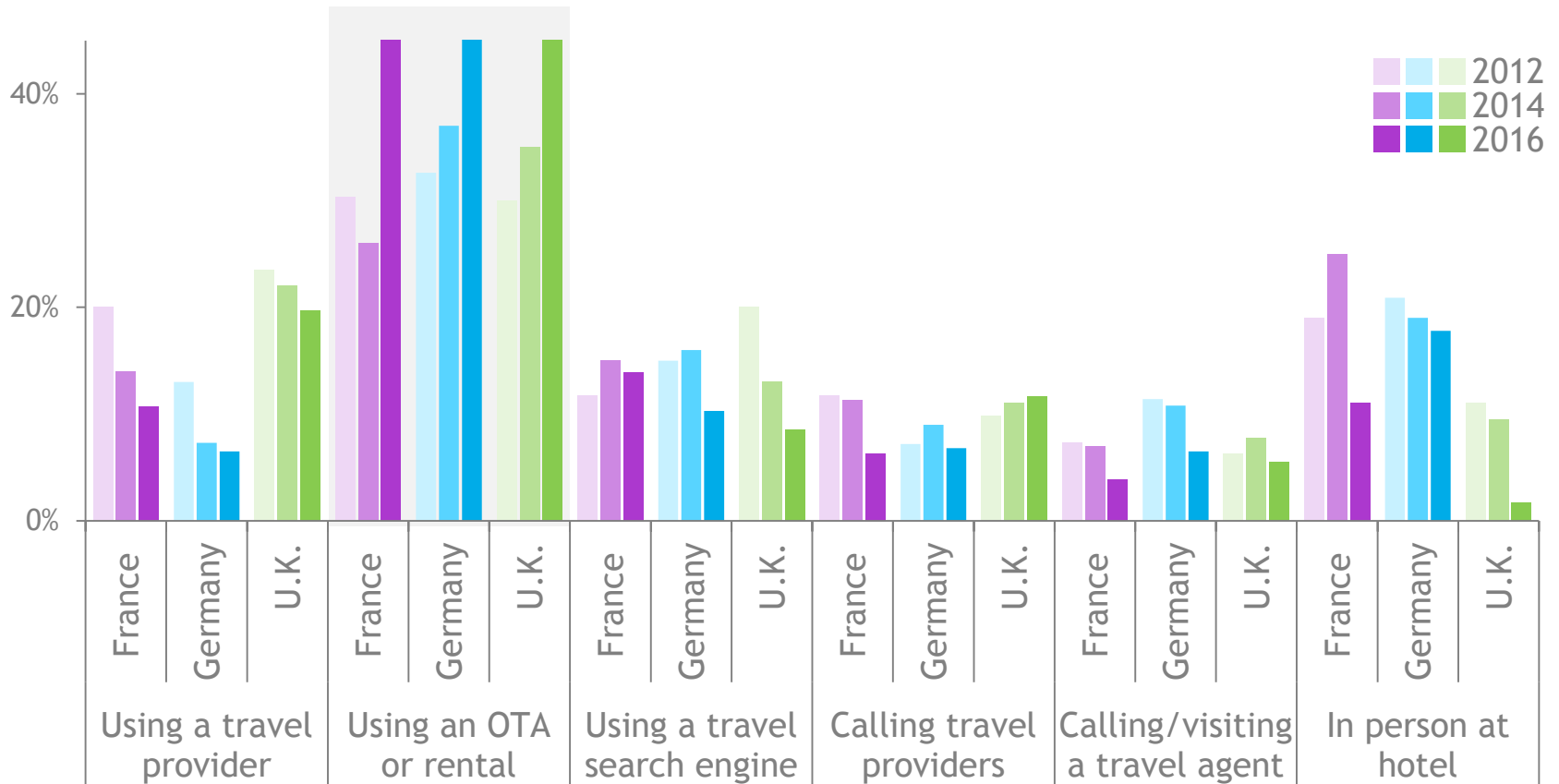


Just as OTAs are
gaining in the
shopping phase,
travelers across
Europe are flocking
to them to purchase
accommodations.



The percentage of travelers that booked lodging through OTAs soared this past year in all three markets.

Typical Purchase Methods for Lodging



Question: Please indicate which method you typically use to book each type of travel component. *Select one response per row.* (Hotel, motel or other paid accommodations)

Base: Travelers who booked lodging (separately, not as part of a package): French travelers (2012 N=571; 2014 N=630; 2016 N=589); German travelers (2012 N=513; 2014 N=808; 2016 N=653); U.K. travelers (2012 N=557; 2014 N=710; 2016 N=734)

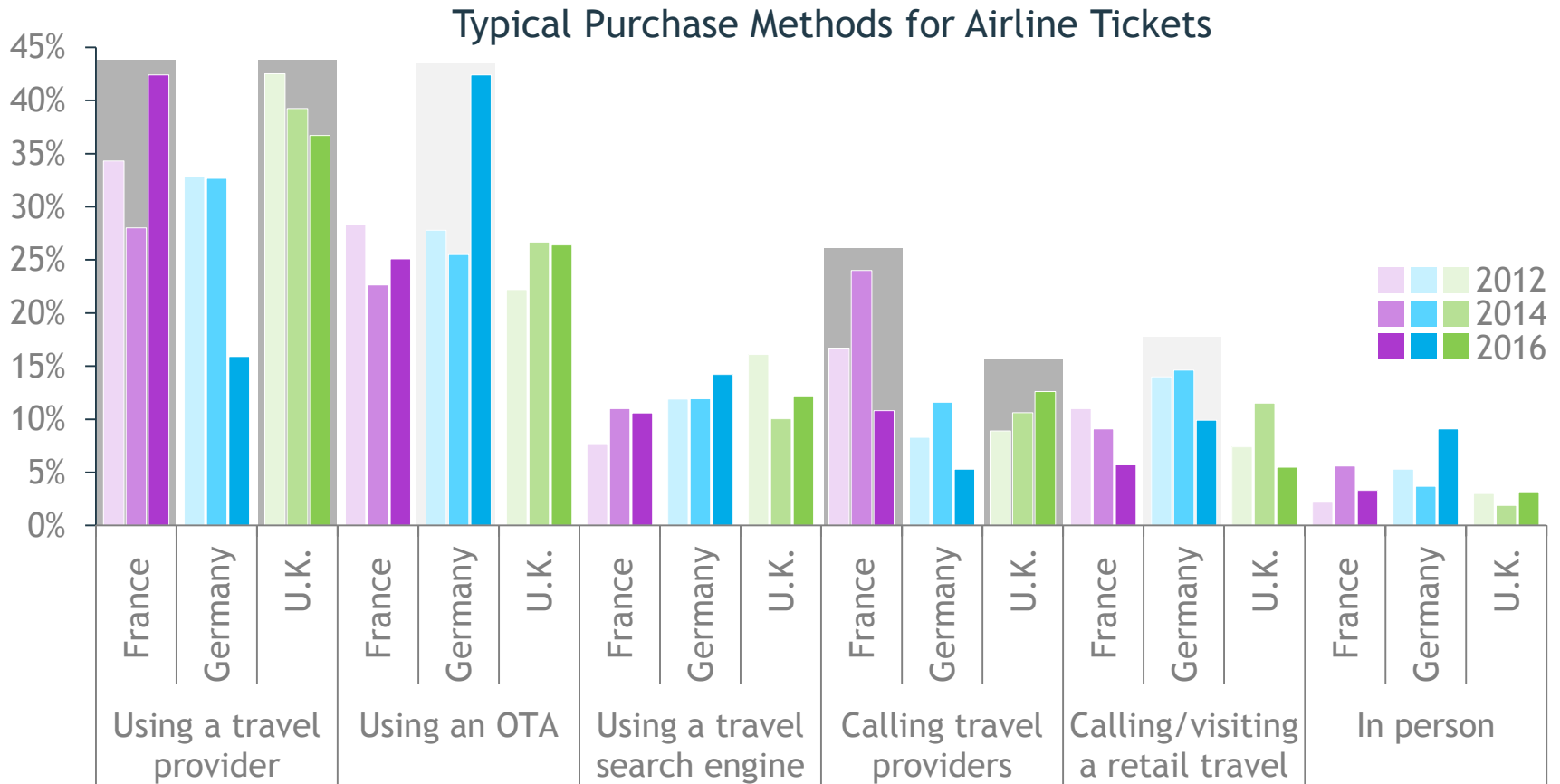
Source: Phocuswright's *European Consumer Travel Report Sixth Edition*





Though, when it comes to booking flights, French and British travelers turn to airline websites and apps.

Travelers from France and the U.K. are over twice as likely as German travelers to book directly with airlines. Conversely, a significantly greater number of German travelers booked flights via OTAs.



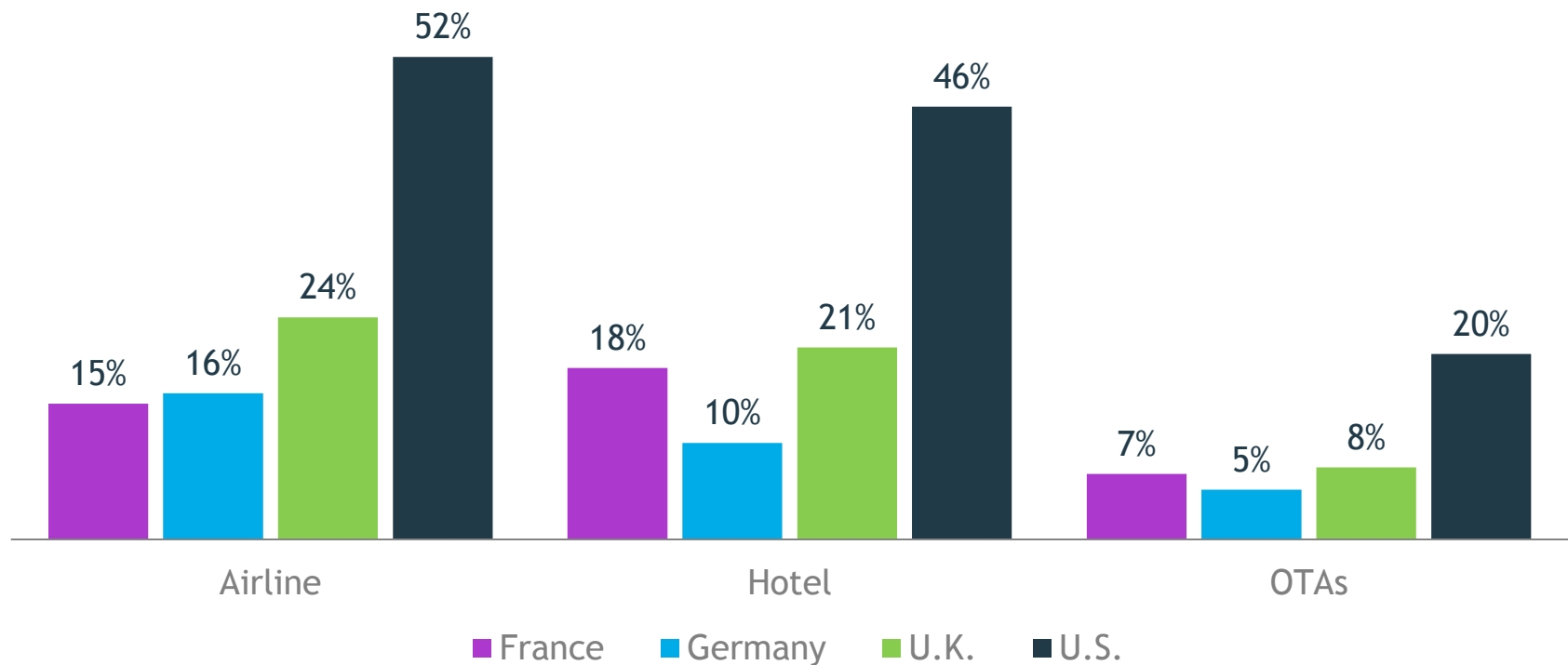
Question: Please indicate which method you typically use to book each type of travel component. *Select one response per row.* (Airline ticket)

Base: Travelers who booked air (separately, not as part of a package): French travelers (2012 N=460, 2014 N=516, 2016 N=449); German travelers (2012 N=338, 2014 N=521, 2016 N=400); U.K. travelers (2012 N=467, 2014 N=582, 2016 N=542)

Source: Phocuswright's European Consumer Travel Report Sixth Edition

A quarter of British travelers belong to an airline loyalty program, the highest membership among Europe's three largest markets. However, European loyalty rates lag well behind the U.S.

Loyalty Program Memberships



Question: Are you a member of a loyalty or frequent flyer program for any of the following types of travel companies? *Select all that apply.*

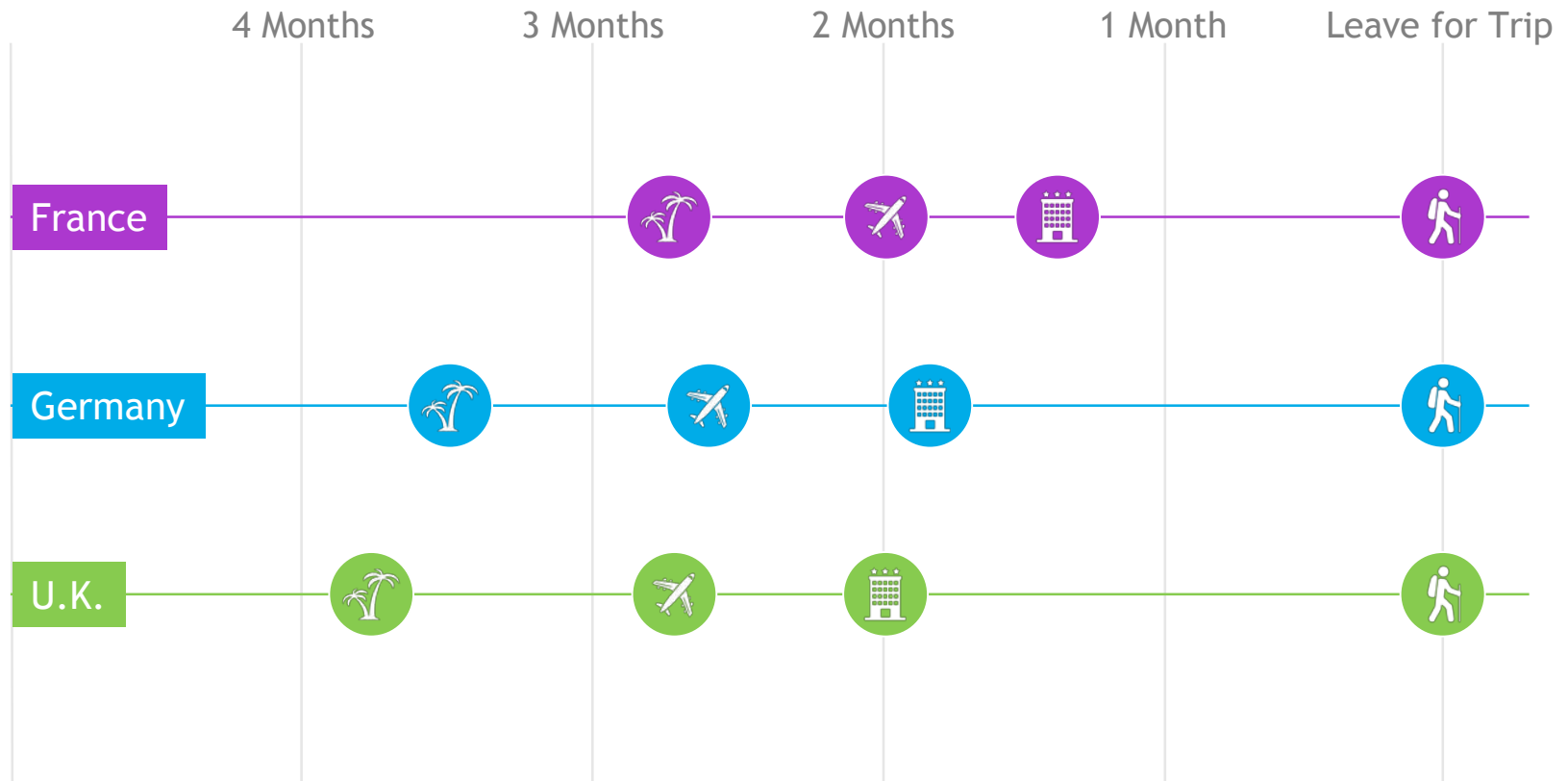
Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046); U.S. travelers (2016 N=1,862)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Overall, the average British traveler tends to plan and book leisure trips much further in advance than other European travelers - particularly those from France, who tend to be more spontaneous with their trip planning.

Average Leisure Planning Timeline



Pick Destination



Book Air

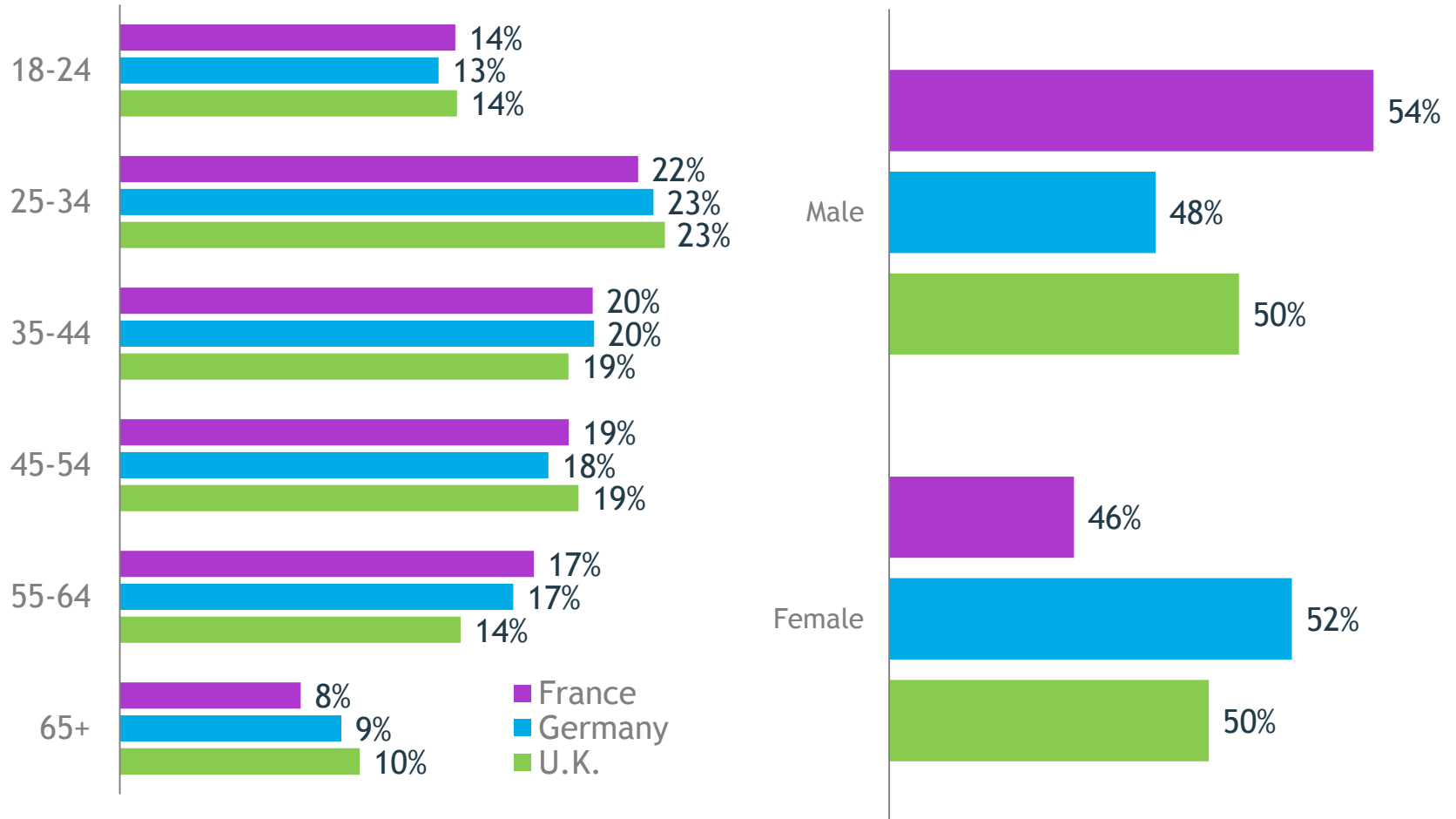


Book Hotel

Demographics



Gender and Age Distribution by Country



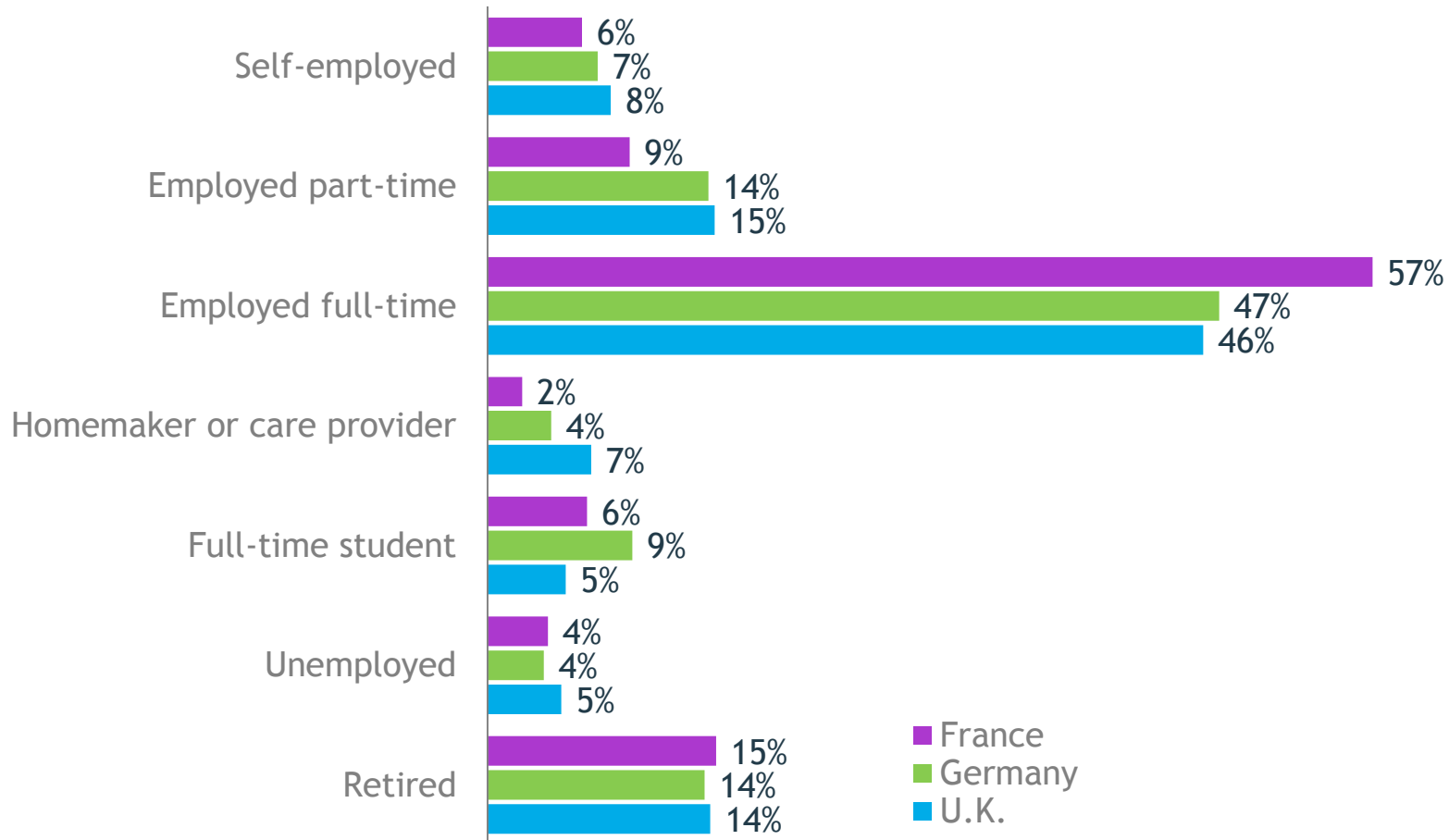
Questions: In what year were you born? What is your gender?

Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



General Demographics - Employment Status



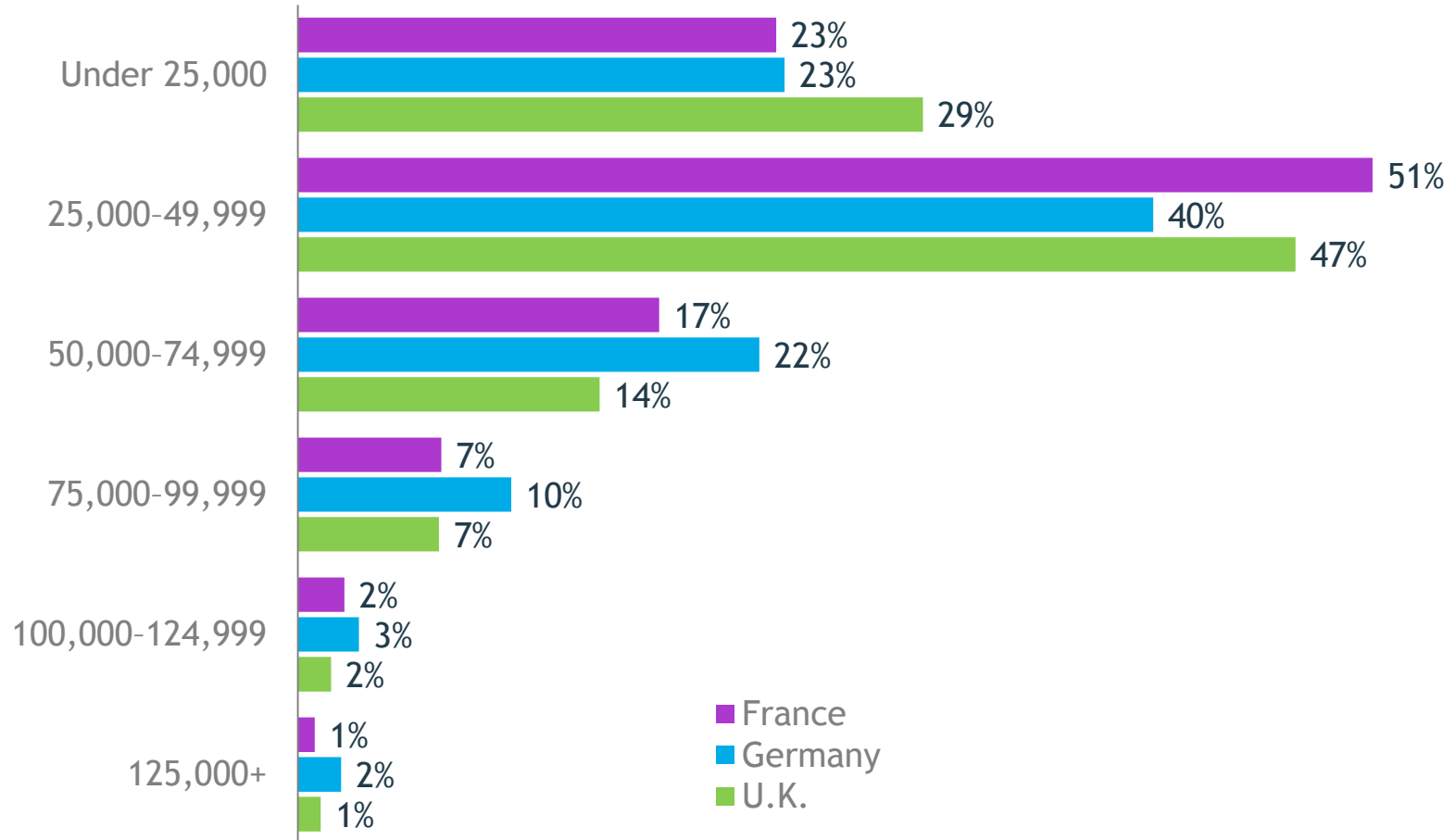
Question: Would you say you are: *Select one.*

Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Income



Question: What is your approximate total annual household income? *Select one.*

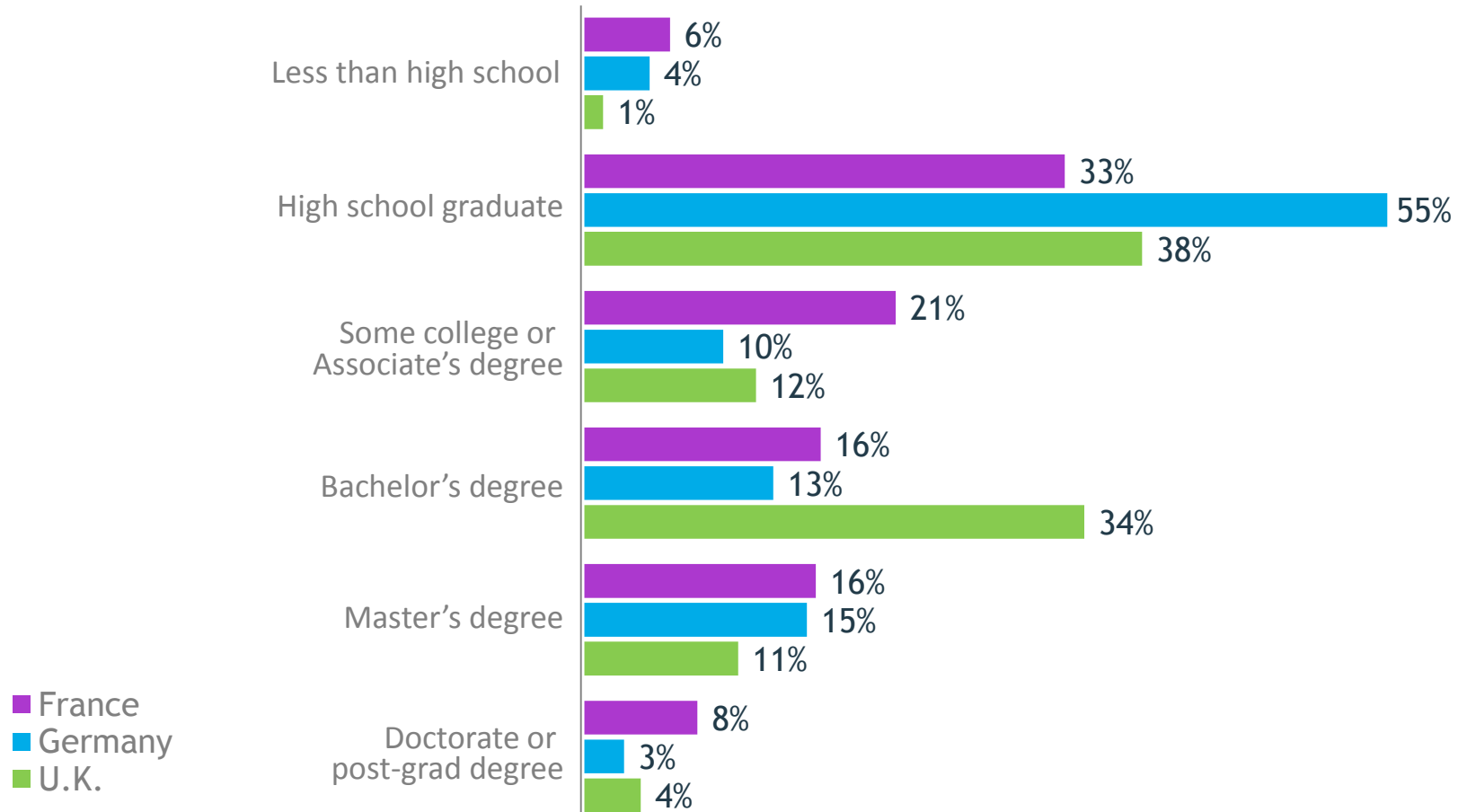
Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

Note: Amounts represent £ in U.K., € in France and Germany.

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Education



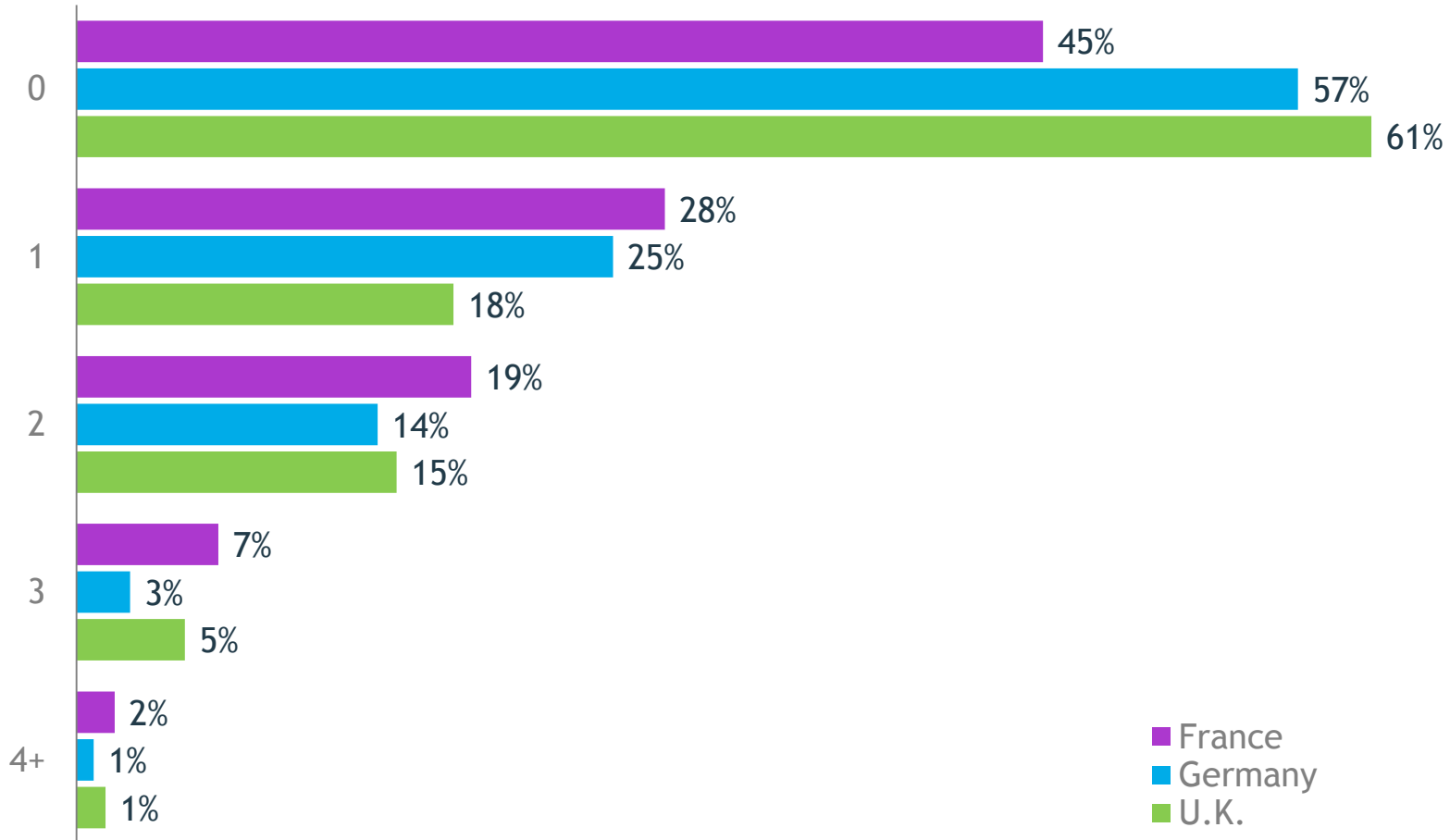
Question: What is the highest level of education you have completed?

Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Children at Home



Question: How many children live in your household?

Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

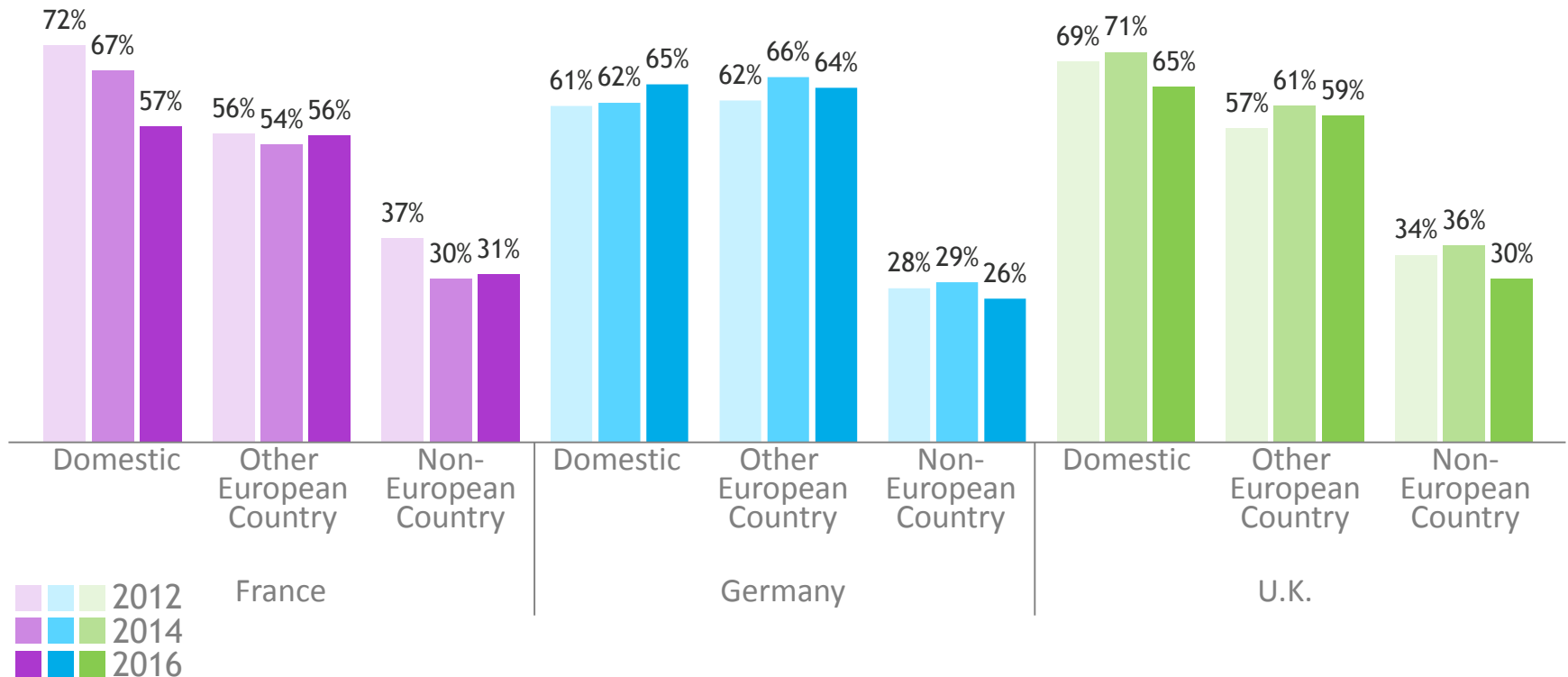
Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Appendix



Percentage of Travelers Who Traveled to Domestic and International Destinations



Question: Of the N leisure trips you took in the past year, how many were to:

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042); German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071); U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Key Traveler Metrics - France

France									
Travel Metric	Incidence			Annual Spend			Trip Frequency		
	2012	2014	2016	2012	2014	2016	2012	2014	2016
Lodging and transportation*	58%	61%	61%	€3,244	€3,007	€2,681	4.2	3.1	2.6
Lodging only	20%	22%	30%	€1,301	€1,109	€1,200	2.6	2.0	2.0
Transportation* only	22%	17%	10%	€1,839	€2,197	€1,552	2.8	2.1	1.6
Average (Total)	---	---	---	€2,552	€2,458	€2,136	3.6	2.7	2.3

Questions: Which of the following, if any, have you done while traveling for leisure in the past 12 months? *Select all that apply*. What was the total amount your household spent on travel components (including airline tickets, paid lodging, car rental, cruise tickets, railway tickets for overnight trips) for your N leisure trips in the past year? *Enter whole number without currency sign*. In the last 12 months, how many TOTAL leisure trips did you take that included paid accommodations and/or air travel?

Base: French travelers (2012 N=878, 2014 N=1,084, 2016 N=1,042)

Note: *Transportation = air tickets and/or rail tickets

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Key Traveler Metrics - Germany

Germany									
Travel Metric	Incidence			Annual Spend			Trip Frequency		
	2012	2014	2016	2012	2014	2016	2012	2014	2016
Lodging and transportation*	59%	66%	60%	€3,489	€3,583	€3,139	3.1	2.9	3.0
Lodging only	28%	23%	28%	€1,362	€1,458	€1,396	2.2	2.1	1.9
Transportation* only	13%	11%	12%	€1,612	€1,984	€2,116	1.8	2.1	1.7
Average (Total)	---	---	---	€2,644	€2,924	€2,530	2.7	2.6	2.5

Questions: Which of the following, if any, have you done while traveling for leisure in the past 12 months? *Select all that apply*. What was the total amount your household spent on travel components (including airline tickets, paid lodging, car rental, cruise tickets, railway tickets for overnight trips) for your N leisure trips in the past year? *Enter whole number without currency sign*. In the last 12 months, how many TOTAL leisure trips did you take that included paid accommodations and/or air travel?

Base: German travelers (2012 N=892, 2014 N=1,323, 2016 N=1,071)

Note: *Transportation = air tickets and/or rail tickets

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Key Traveler Metrics - U.K.

U.K.									
Travel Metric	Incidence			Annual Spend			Trip Frequency		
	2012	2014	2016	2012	2014	2016	2012	2014	2016
Lodging and transportation*	70%	73%	73%	€3,233	€3,793	€3,306	4.4	3.7	3.0
Lodging only	19%	16%	19%	€1,306	€1,070	€1,182	2.5	2.5	2.0
Transportation* only	11%	11%	8%	€1,435	€2,412	€1,847	2.3	2.5	1.8
Average (Total)	---	---	---	€2,676	€3,213	€2,779	3.8	3.4	2.7

Questions: Which of the following, if any, have you done while traveling for leisure in the past 12 months? *Select all that apply*. What was the total amount your household spent on travel components (including airline tickets, paid lodging, car rental, cruise tickets, railway tickets for overnight trips) for your N leisure trips in the past year? *Enter whole number without currency sign*. In the last 12 months, how many TOTAL leisure trips did you take that included paid accommodations and/or air travel?

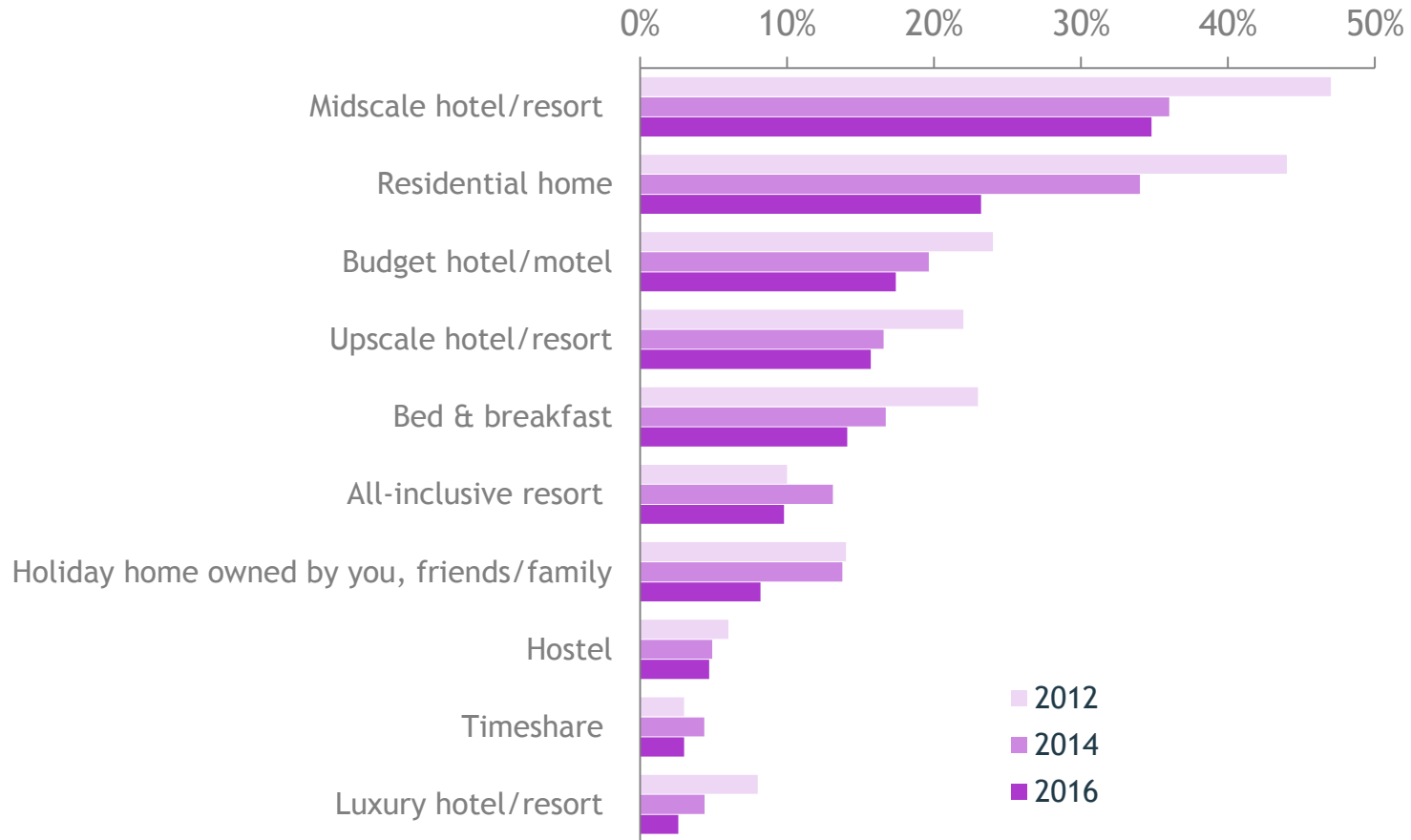
Base: U.K. travelers (2012 N=844, 2014 N=1,054, 2016 N=1,046)

Note: *Transportation = air tickets and/or rail tickets

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Lodging Usage in France



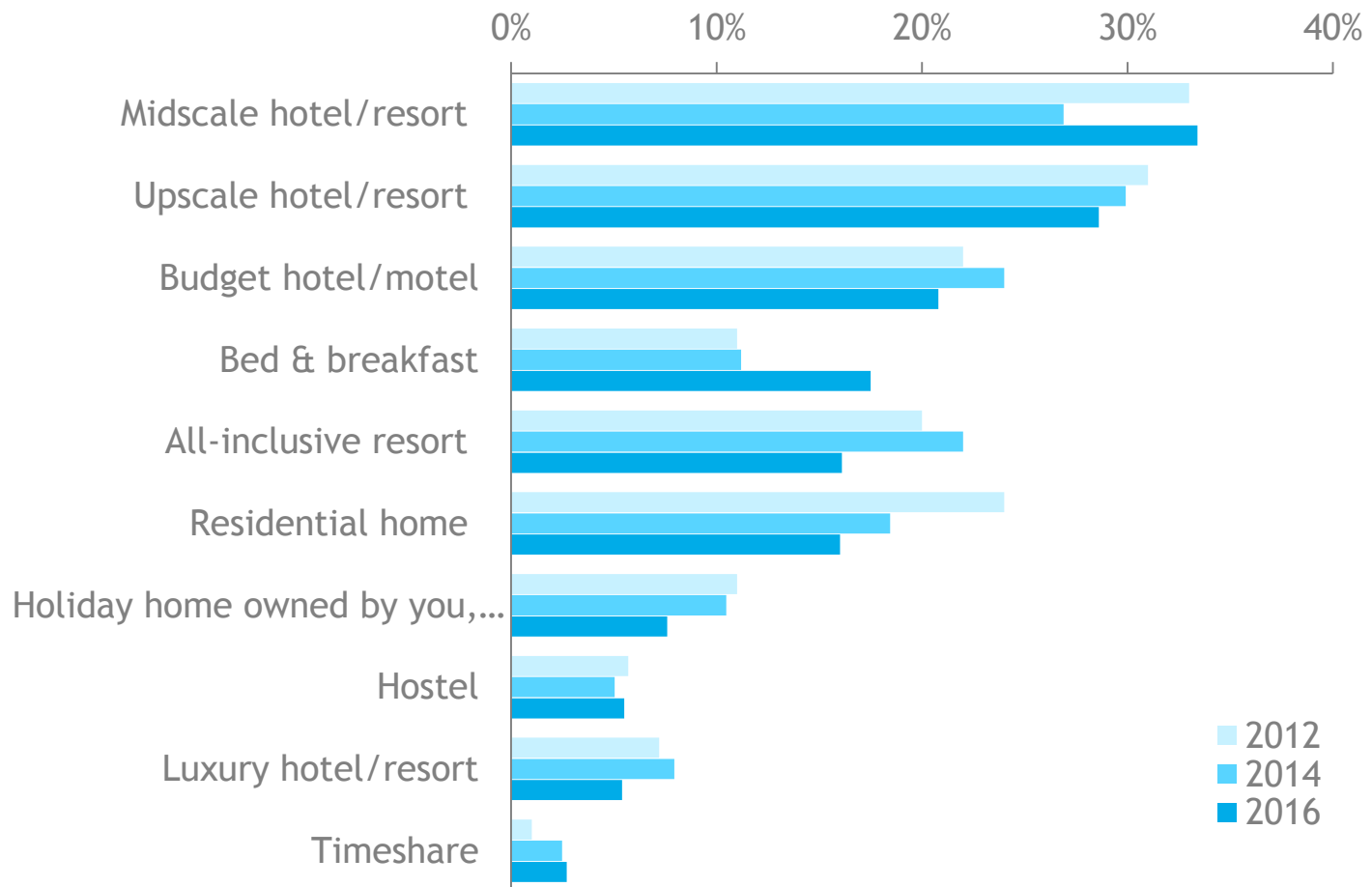
Question: What type of lodging did you use in the past year when traveling for leisure? *Select all that apply.*

Base: French lodging bookers (2012 N=878, 2014 N=1,084, 2016 N= 905)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Lodging Usage in Germany



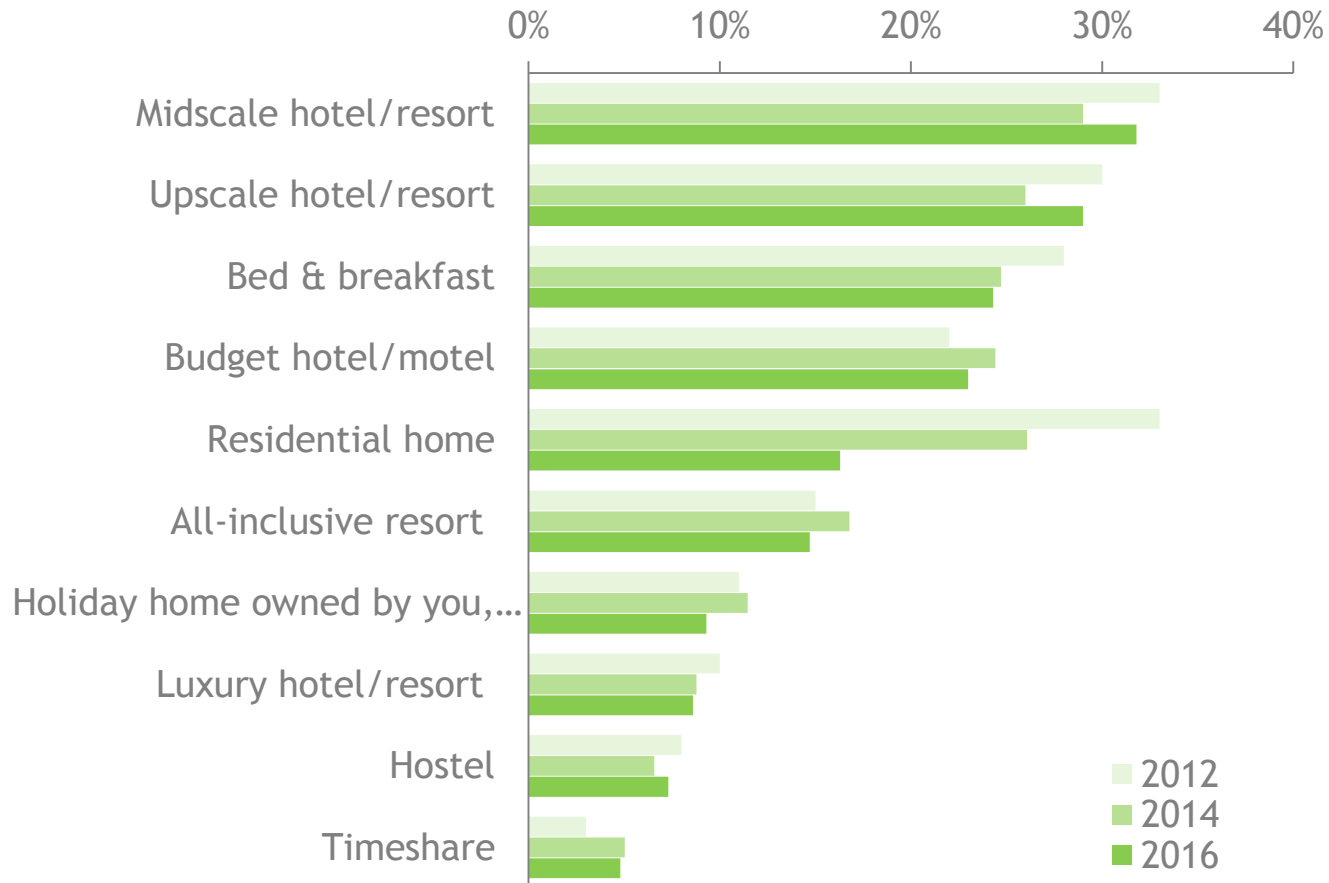
Question: What type of lodging did you use in the past year when traveling for leisure? *Select all that apply.*

Base: German lodging bookers (2012 N=892, 2014 N=1,323, 2016 N=914)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Lodging Usage in the U.K.



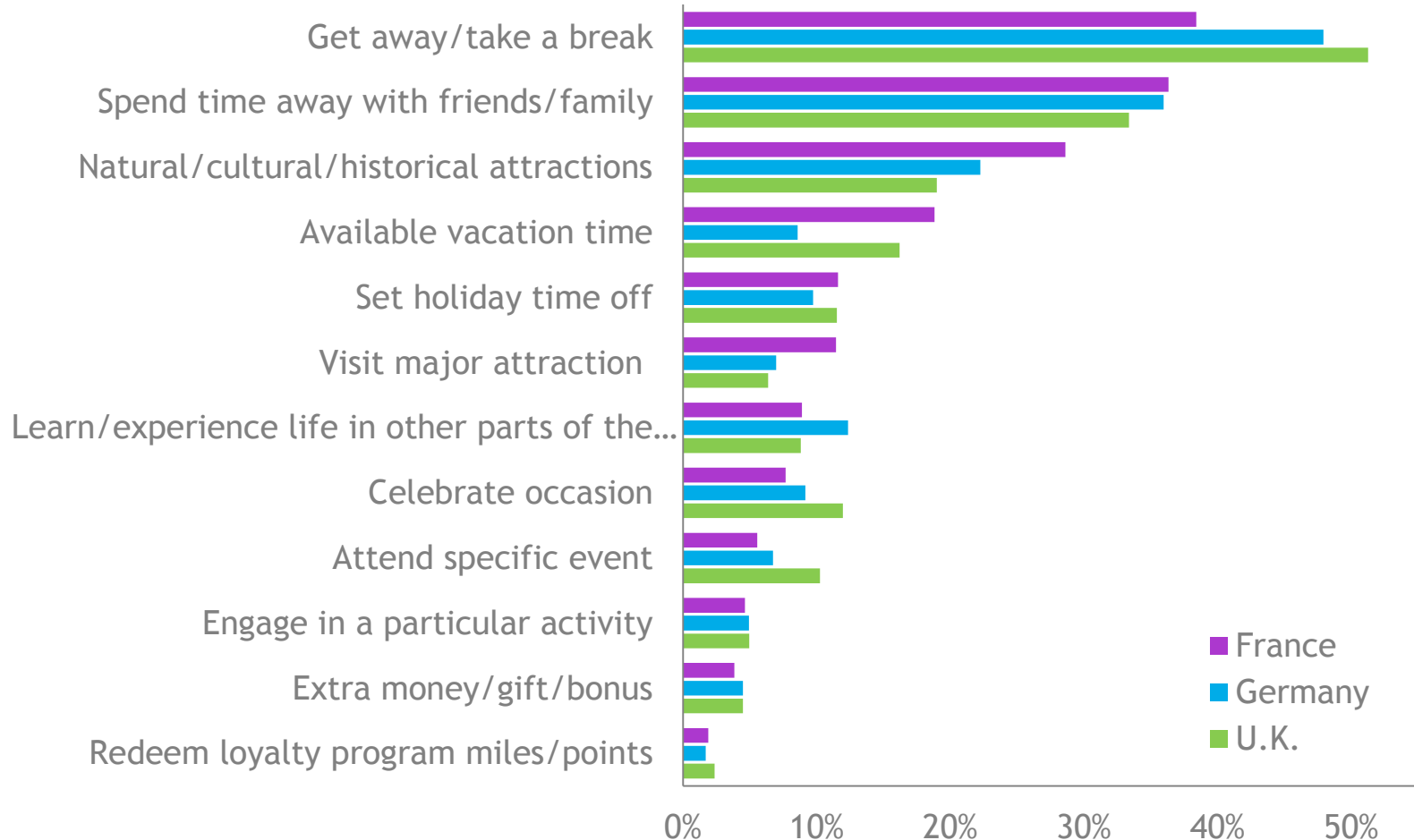
Question: What type of lodging did you use in the past year when traveling for leisure? *Select all that apply.*

Base: U.K. lodging bookers (2012 N=844, 2014 N=1,054, 2016 N=957)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Last Trip Motivations



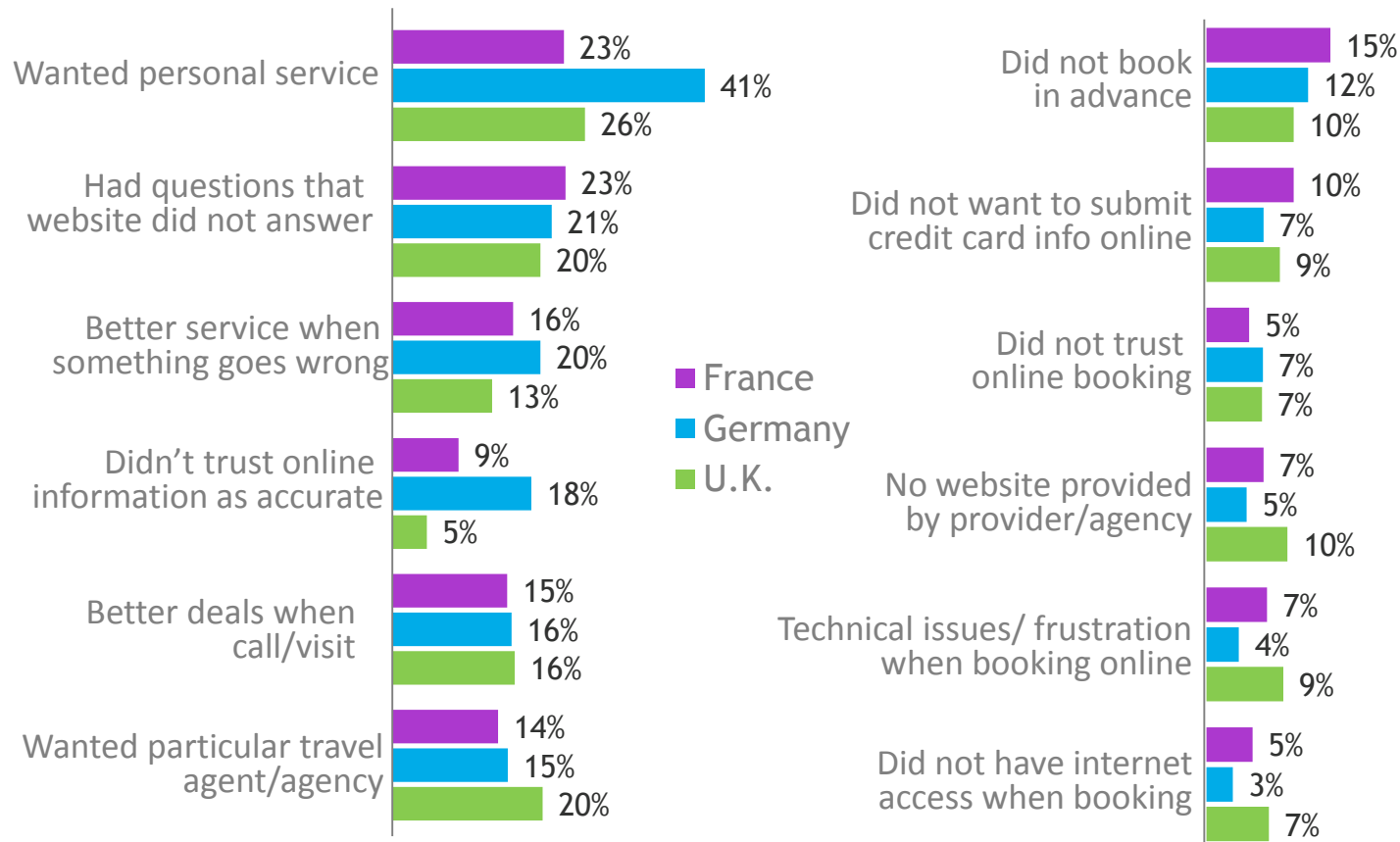
Question: What motivated you to take this trip? *Select all that apply.*

Base: French travelers (2016 N=1,042); German travelers (2016 N=1,071); U.K. travelers (2016 N=1,046)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Reasons to Book Leisure Travel Offline



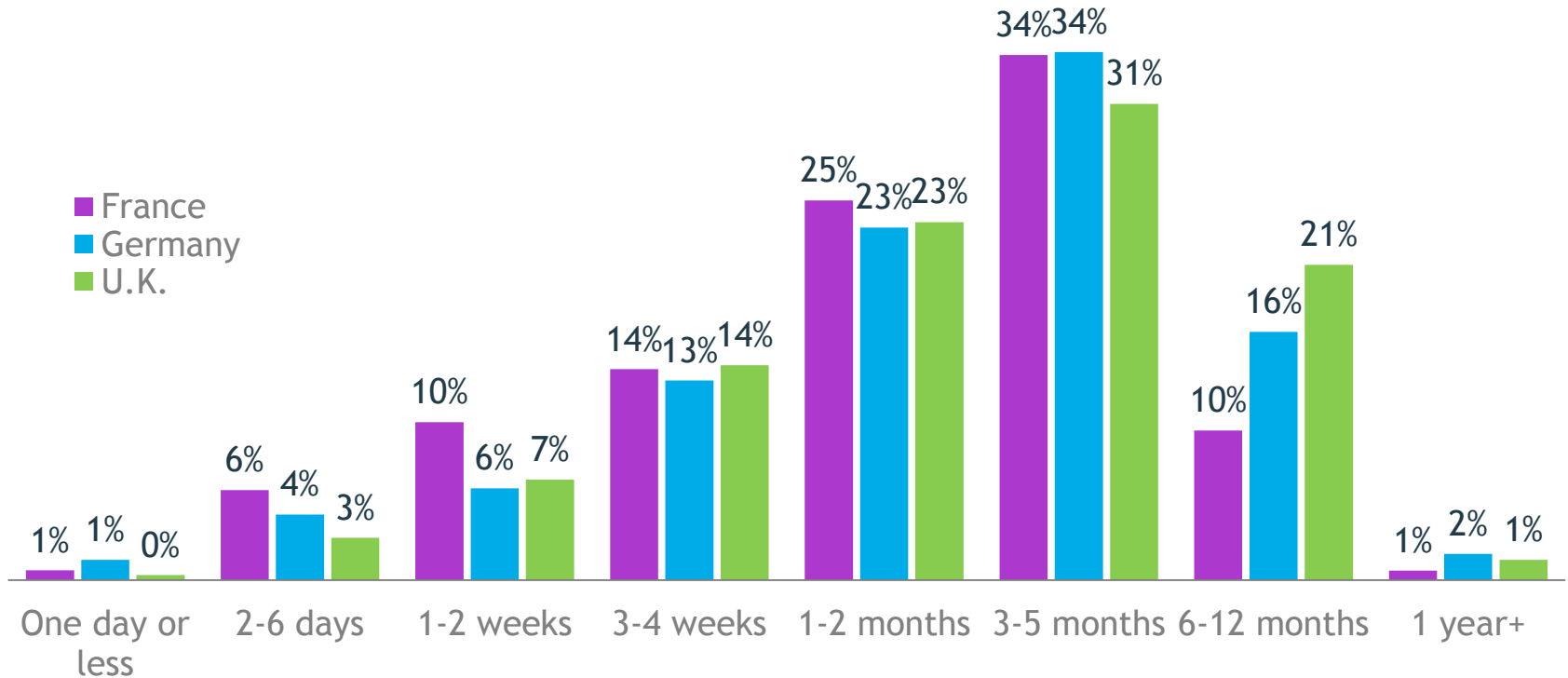
Question: Why did you book some or all of your travel offline (not using the Internet)? *Please select all that apply.*

Base: Offline bookers: France (2016 N=633); Germany (2016 N=658); U.K. (2016 N=572)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Destination Selection Window (Last Trip)



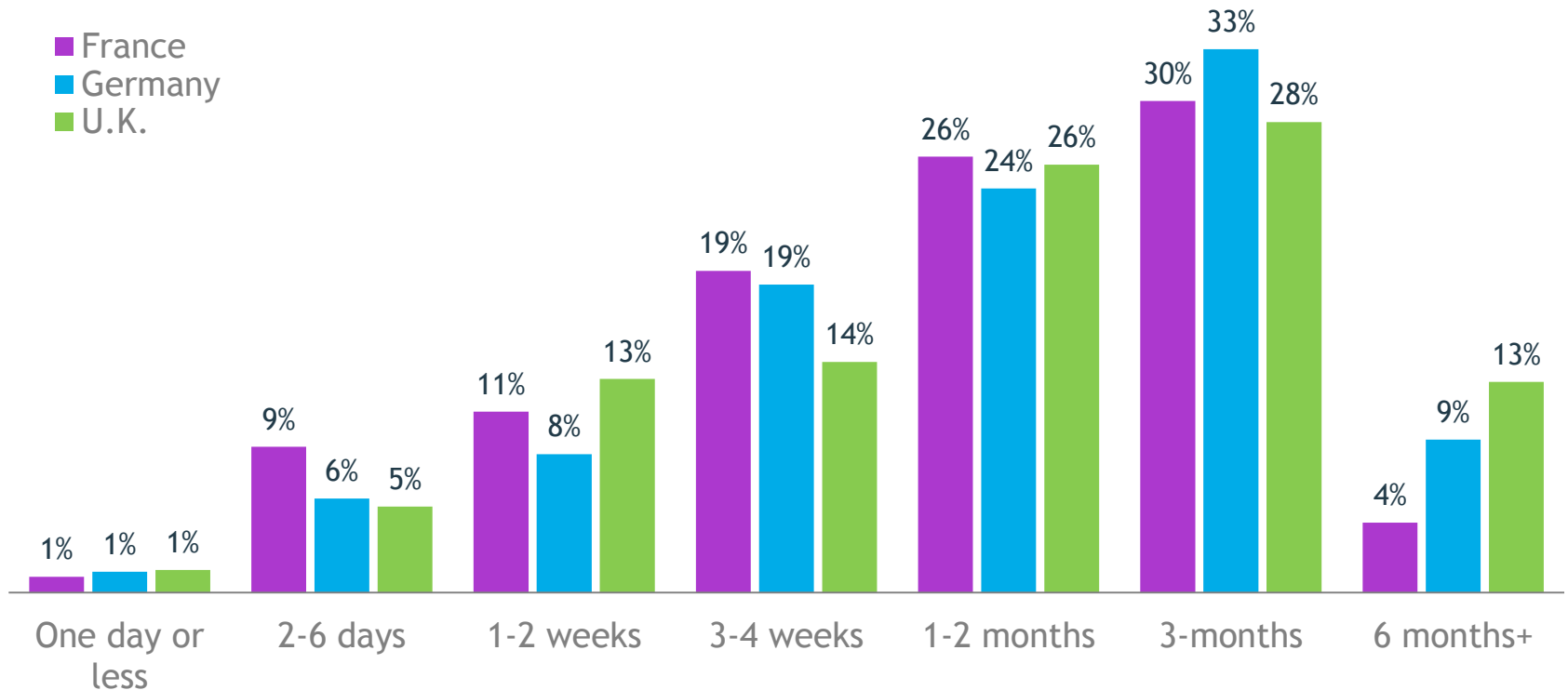
Question: How far in advance of your departure did you decide on the destination for this trip? *Select one*

Base: Respondents that selected destinations independently: French travelers (N=636), German travelers (N=764), U.K. travelers (N=617)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Airfare Booking Window Prior to Departure of Last Trip



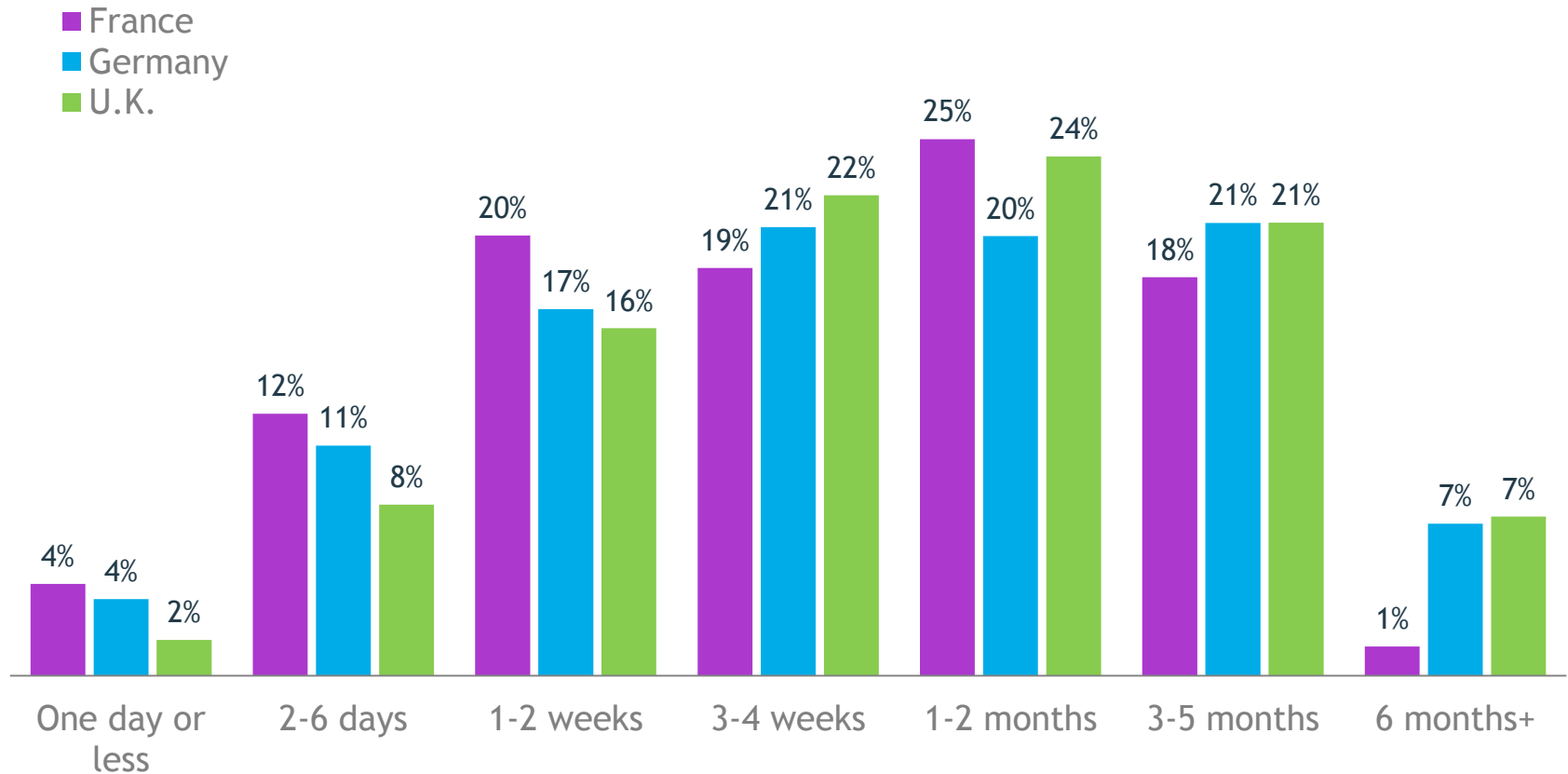
Question: How far in advance of your departure date did you book your flight?

Base: Travelers who booked air last trip (separately, not as part of a package): French travelers (2016 N=379), German travelers (2016 N=304), U.K. travelers (2016 N=416)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Hotel Booking Window Prior to Departure of Last Trip



Question: How far in advance of your departure date did you book your hotel?

Base: Travelers who booked a hotel last trip (separately, not as part of a package): French travelers (2016 N=420), German travelers (2016 N=464), U.K. travelers (2016 N=550)

Source: Phocuswright's *European Consumer Travel Report Sixth Edition*



Thank You!

European Consumer Travel Report Sixth Edition

*Key Consumer Trends Shaping the
European Travel Economy*

September 2016

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