

# EUROPEAN TRAVEL: INDUSTRY REPORTING



An overview of the growth  
trends and operating costs  
in the EU Markets

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# Report Overview



- Tourism trends by geographic location
- Financial analysis
- Environmentally responsible concerns
- Industry standards



# Global Tourism Visits, (% change)

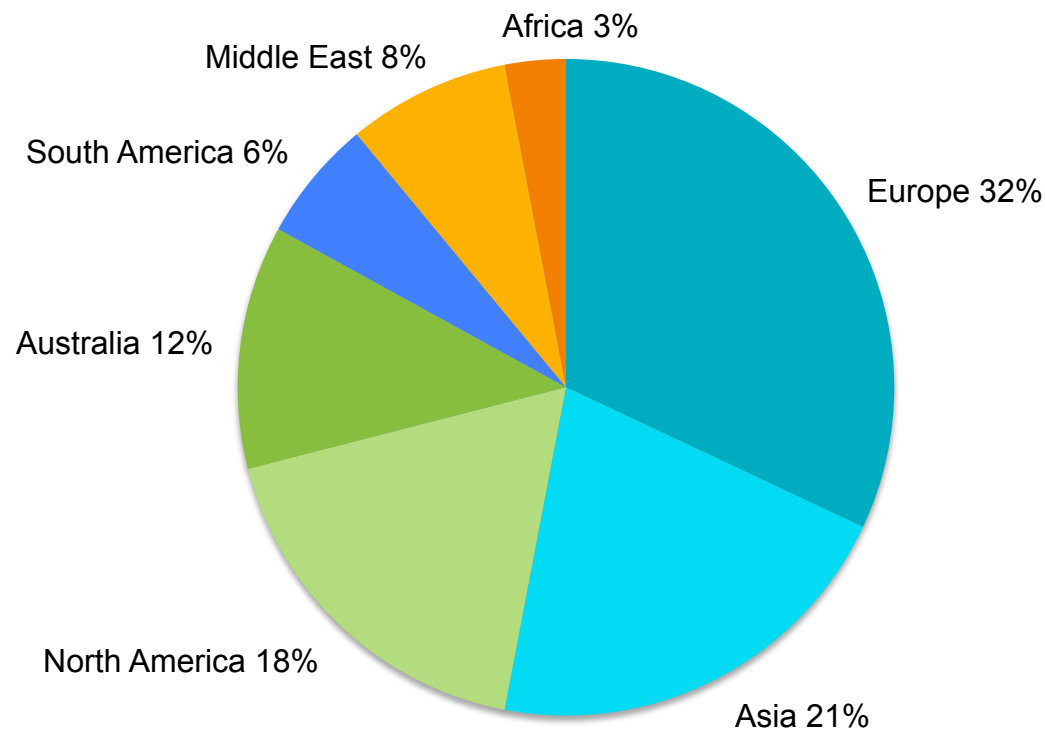


|                               | Inbound      |             | Outbound      |             |
|-------------------------------|--------------|-------------|---------------|-------------|
|                               | 2012         | 2014        | 2012          | 2014        |
| <b>World</b>                  | <b>4.1%</b>  | <b>3.3%</b> | <b>3.7%</b>   | <b>3.8%</b> |
| <b>Americas</b>               | <b>4.4%</b>  | <b>3.3%</b> | <b>5.4%</b>   | <b>4.3%</b> |
| North America                 | 4.3%         | 3.0%        | 4.7%          | 4.6%        |
| Caribbean                     | 3.2%         | 4.0%        | -1.7%         | 4.9%        |
| Central & South America       | 5.6%         | 3.7%        | 9.4%          | 3.2%        |
| <b>Europe</b>                 | <b>3.8%</b>  | <b>2.7%</b> | <b>3.7%</b>   | <b>2.3%</b> |
| EU                            | 3.0%         | 2.9%        | 1.2%          | 3.3%        |
| Non-EU                        | 6.6%         | 2.1%        | 11.9%         | -0.5%       |
| <b>Asia &amp; the Pacific</b> | <b>6.7%</b>  | <b>4.5%</b> | <b>7.4%</b>   | <b>5.2%</b> |
| North East                    | 6.0%         | 5.5%        | 8.4%          | 5.6%        |
| South East                    | 8.9%         | 3.2%        | 5.7%          | 4.1%        |
| South                         | 3.7%         | 5.9%        | 4.0%          | 6.2%        |
| Oceania                       | 2.4%         | 1.9%        | 4.9%          | 3.2%        |
| <b>Africa</b>                 | <b>8.3%</b>  | <b>1.9%</b> | <b>6.0%</b>   | <b>3.1%</b> |
| <b>Middle East</b>            | <b>-8.9%</b> | <b>5.7%</b> | <b>-12.2%</b> | <b>6.6%</b> |





## Travel by Region (% of population)



# Modes of Travel



**Average Number of trips per year**



# Market Share in the Travel Industry



Our company's target market is the hip, urban professional, 20s to 30s, worldwide. They work hard and play hard, and like to contrast their working life with challenging outdoor travel adventures. They are environmentally aware and interested in making a difference. They have sophisticated tastes and humor, but are not frivolous in their lifestyles or purchases.

## **Competitive Analysis**

Our company's market share in the travel industry has been steadily increasing since the introduction of our company in 2011, and currently hovers around approximately 15% of US sales, 10% of European sales, and 7% of Asian sales. We do believe, however, that increased marketing efforts are needed to maintain this growth, due to ever-increasing competition from other travel brands.



# Travel Industry Facts



- The average person is spending more money on travel in the past 5 years than ever before
- Slightly under one-third of travelers visited European destinations in 2013
- Travel by rail & train saw its highest levels in the last 5 years with around 12,000 trips per year from 2009-2013.







## European growth trends: 2014

Europe was a very popular travel destination and reported double digit growth in visitors from China, India and United Arab Emirates. Overall in the first 8 months of 2014 the number of tourist arrivals in Europe rose to 413million, an increase of 4.2%

Spain, France and Italy recorded the highest amounts of international travel receipts over the course of 2014 (56B, 52B, 38.5B respectively)

- The number of foreign trips rose by 3% as compared to 2013
- Spending per overnight grew by 4%
- Booking online grew by 7%
- Substantial increase in trips to Switzerland (+ 7%), Denmark and Poland (+6.7% each), Sweden, UK and Spain (+ 5% each).

