INBOUND TRAVEL MARKET PROFILE: EUROPE

Updated August 2022
**EUROPE WAS OUR TOP OVERSEAS* INBOUND REGION IN 2019**

Europe accounted for 39% of all overseas visits to the U.S. in 2019, more than any other region.

- Travel Exports from Asia Pacific totaled $93.6 B (see Appendix).

*Overseas travel to the U.S. includes travel from all countries EXCEPT Canada and Mexico

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**TOP 10 OVERSEAS MARKETS**

<table>
<thead>
<tr>
<th>Market</th>
<th>Visitation in 2019, Millions</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>4.8</td>
</tr>
<tr>
<td>Japan</td>
<td>3.8</td>
</tr>
<tr>
<td>China</td>
<td>2.8</td>
</tr>
<tr>
<td>South Korea</td>
<td>2.3</td>
</tr>
<tr>
<td>Brazil</td>
<td>2.1</td>
</tr>
<tr>
<td>Germany</td>
<td>2.1</td>
</tr>
<tr>
<td>France</td>
<td>1.8</td>
</tr>
<tr>
<td>India</td>
<td>1.5</td>
</tr>
<tr>
<td>Australia</td>
<td>1.3</td>
</tr>
<tr>
<td>Italy</td>
<td>1.1</td>
</tr>
</tbody>
</table>

Source of all visitation data in this deck: NTTO

Four European countries—the U.K., Germany, France and Italy—ranked among our top 10 overseas markets, and the U.K. has ranked as Number 1 since 2001.
As expected, throughout much of 2020 and through October 2021, no European markets made our top-10 list of overseas visitors. Instead, that list was replaced with Latin American counties.

In October 2021, prior to the reopening of all inbound travel, visitation volume among restricted European countries ranged from -87% to -97% compared to 2019.

### BUT EUROPE WAS DISPROPORTIONATELY AFFECTED BY THE TRAVEL BAN

**Travel from Europe stagnated** as a result of U.S. border closures.

**28 OUT OF 33 COUNTRIES**

Out of the 33 countries that were banned by the U.S. in the wake of the pandemic—and for 20 months—28 were European (26 Schengen open-border countries plus the U.K. and Ireland).

- As expected, throughout much of 2020 and through October 2021, no European markets made our top-10 list of overseas visitors. Instead, that list was replaced with Latin American counties.
- In October 2021, prior to the reopening of all inbound travel, visitation volume among restricted European countries ranged from -87% to -97% compared to 2019.

<table>
<thead>
<tr>
<th>TOP EUROPE INBOUND MARKET (RANKED BY VISITATIONS IN 2019)</th>
<th>% CHANGE IN VISITATIONS OCTOBER 2021 VS OCTOBER 2019</th>
<th>RANK AMONG ALL OVERSEAS INBOUND MARKETS IN 2019</th>
<th>RANK AMONG ALL OVERSEAS INBOUND MARKETS IN OCT. 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>-97%</td>
<td>1</td>
<td>16</td>
</tr>
<tr>
<td>Germany</td>
<td>-93%</td>
<td>6</td>
<td>17</td>
</tr>
<tr>
<td>France</td>
<td>-94%</td>
<td>7</td>
<td>22</td>
</tr>
<tr>
<td>Italy</td>
<td>-91%</td>
<td>10</td>
<td>25</td>
</tr>
<tr>
<td>Spain</td>
<td>-87%</td>
<td>12</td>
<td>23</td>
</tr>
<tr>
<td>Netherlands</td>
<td>-94%</td>
<td>14</td>
<td>34</td>
</tr>
<tr>
<td>Ireland</td>
<td>-96%</td>
<td>15</td>
<td>52</td>
</tr>
<tr>
<td>Switzerland</td>
<td>-92%</td>
<td>18</td>
<td>39</td>
</tr>
<tr>
<td>Sweden</td>
<td>-97%</td>
<td>20</td>
<td>60</td>
</tr>
<tr>
<td>Denmark</td>
<td>-97%</td>
<td>27</td>
<td>67</td>
</tr>
<tr>
<td>Belgium</td>
<td>-92%</td>
<td>31</td>
<td>50</td>
</tr>
<tr>
<td>Norway</td>
<td>-96%</td>
<td>33</td>
<td>76</td>
</tr>
<tr>
<td>Russia</td>
<td>-47%</td>
<td>34</td>
<td>20</td>
</tr>
<tr>
<td>Poland</td>
<td>-91%</td>
<td>36</td>
<td>59</td>
</tr>
<tr>
<td>Austria</td>
<td>-88%</td>
<td>38</td>
<td>48</td>
</tr>
</tbody>
</table>
Some European countries were not affected by the ban... but none of those were major inbound markets to the U.S.

The U.S. travel ban was specifically geared to Schengen area (open border) countries plus the U.K. and Ireland.

Non-Schengen European countries such as Romania, Bulgaria, Croatia, Serbia and Bosnia (among others) were technically not affected by the restrictions and experienced less severe relative declines in visitations. But visitations from those markets to the U.S. have always been very limited and none of these countries were included among top 50 inbound markets in 2019.

Two countries on the top 50 list that are partially in Europe, Russia and Turkey, were also not included in the ban and visitations were at “only” -47% and -46%, respectively, in Oct. 2021 compared to 2019. But, at ranks of 34 and 45, respectively, in 2019, they too were not major U.S. inbound markets.
The reopening of the border jump-started the recovery, which has continued into the summer, but still has ways to go.

- Of all regions, Europe experienced the strongest recovery following the November 2021 reopening of our borders; visitations recovered from -93% in October 2021 to -45% in December 2021 and ‘only’ -22% in July 2022.

- After slowing down in the spring, the pace of recovery has picked up in July, but a full recovery remains months away.

U.S. Visitations from Europe
% change compared to same month in 2019
Different European markets have been recovering at very different rates.

Among European countries included in our top 20 overseas markets, visitations from Sweden remained at -35% in July 2022 (compared to July 2019), those from the U.K., Germany, France, Italy, Spain, the Netherlands and Switzerland remained in the -19% to -29% range, while those from Ireland recovered to just -16%.

Among European countries within our top 50 list, the best performance in July 2022 was Poland at +26% and the worst, by far, was Russia at 80% (a consequence of the war).
When asked to list the top-3 foreign countries they would most like to visit in the next 12 months (Feb. 2022 survey), the U.S. was the top long-haul (non-European) destination for all surveyed European countries.

**U.S. AS A TOP-3 DESIRED DESTINATION**

- **U.K. TRAVELERS**: 28%
- **FRENCH TRAVELERS**: 20%
- **GERMAN TRAVELERS**: 14%

Top deterrents for not visiting the U.S. more frequently for European travelers include: expensive airfare and that the U.S. is too far away.
APPENDIX 1: VISITATION, SPENDING AND TRAVEL TRADE BALANCE FOR TOP EUROPEAN INBOUND MARKETS IN 2019 AND 2021

<table>
<thead>
<tr>
<th>TOP 10 EUROPEAN MARKETS, 2019</th>
<th>VISITATIONS 2019 (MILLIONS)</th>
<th>TRAVEL EXPORTS, 2019 ($ BILLIONS)</th>
<th>TRAVEL TRADE BALANCE, 2019 ($ BILLIONS)</th>
<th>VISITATIONS 2021 (MILLIONS)</th>
<th>TRAVEL EXPORTS, 2021 ($ BILLIONS)</th>
<th>TRAVEL TRADE BALANCE, 2021 ($ BILLIONS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>4.8</td>
<td>15.5</td>
<td>-0.1</td>
<td>0.5</td>
<td>2.1</td>
<td>-0.9</td>
</tr>
<tr>
<td>Germany</td>
<td>2.1</td>
<td>7.6</td>
<td>-0.4</td>
<td>0.2</td>
<td>1.3</td>
<td>-1.0</td>
</tr>
<tr>
<td>France</td>
<td>1.8</td>
<td>6.0</td>
<td>-2.2</td>
<td>0.2</td>
<td>1.0</td>
<td>-1.3</td>
</tr>
<tr>
<td>Italy</td>
<td>1.1</td>
<td>3.9</td>
<td>-4.4</td>
<td>0.1</td>
<td>0.8</td>
<td>-1.0</td>
</tr>
<tr>
<td>Spain</td>
<td>0.9</td>
<td>2.6</td>
<td>-1.7</td>
<td>0.2</td>
<td>0.9</td>
<td>-0.5</td>
</tr>
<tr>
<td>Netherlands</td>
<td>0.7</td>
<td>3.3</td>
<td>-0.6</td>
<td>0.1</td>
<td>0.4</td>
<td>-0.7</td>
</tr>
<tr>
<td>Ireland</td>
<td>0.5</td>
<td>2.6</td>
<td>-1.3</td>
<td>0.0</td>
<td>0.3</td>
<td>-0.3</td>
</tr>
<tr>
<td>Switzerland</td>
<td>0.5</td>
<td>1.9</td>
<td>-0.1</td>
<td>0.1</td>
<td>0.3</td>
<td>-0.3</td>
</tr>
<tr>
<td>Sweden</td>
<td>0.5</td>
<td>2.2</td>
<td>-0.7</td>
<td>0.0</td>
<td>0.2</td>
<td>0.0</td>
</tr>
<tr>
<td>Denmark</td>
<td>0.3</td>
<td>1.5</td>
<td>-0.6</td>
<td>0.0</td>
<td>0.1</td>
<td>0.0</td>
</tr>
<tr>
<td><strong>EUROPE TOTAL</strong></td>
<td><strong>15.7</strong></td>
<td><strong>57.8</strong></td>
<td><strong>-11.7</strong></td>
<td><strong>2.0</strong></td>
<td><strong>11.0</strong></td>
<td><strong>-7.7</strong></td>
</tr>
</tbody>
</table>

SOURCE: Bureau of Economic Analysis (BEA)
APPENDIX 2: TRAVEL CHARACTERISTICS OF EUROPEAN VISITORS PRIOR TO THE PANDEMIC

TOP STATES VISITED BY EUROPEANS

- NEW YORK 36%
- FLORIDA 22%
- CALIFORNIA 19%
- NEVADA 10%

MAIN PURPOSE OF TRIP

- VACATION/HOLIDAY 61%
- VISITING FRIENDS & RELATIVES 19%
- BUSINESS 11%
- CONVENTION/CONFERENCE/TRADE SHOWS 6%

PREFERRED ACTIVITIES

- SHOPPING 83%
- SIGHTSEEING 80%
- VISITING NATIONAL PARK/MONUMENTS 43%
- VISITING ART GALLERIES/MUSEUMS 35%
- VISITING SMALL TOWNS/COUNTRY SIDE 33%

Source: NTTO SIAT Survey