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HOW TOURISTS ARE SELECTING AND BOOKING HOLIDAY DESTINATIONS: INSIGHTS INTO BEHAVIOUR OF POTENTIAL TOURISTS FROM KEY MARKETS AND HIGH POTENTIAL MARKETS FOR INCOMING TOURISM IN BOSNIA AND HERZEGOVINA

Part 1: Secondary research

Final Report

Zagreb, December 4th 2018

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Final Report

Client:
MarketMakers

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This publication was published within the project MarketMakers, supported by the Government of Switzerland and implemented by the consortium Helvetas i Kolektiv d.o.o. in B&H. The content of this publication, as well as the findings contained therein, do not necessarily reflect the views of the Government of Switzerland.

Ova publikacija objavljena je u okviru projekta MarketMakers, kojeg podržava Vlada Švicarske, a sprovodi konzorcij Helvetas i Kolektiv d.o.o. u BiH. Sadržaj ove publikacije, kao i nalazi prikazani u njoj, ne odražavaju nužno stavove Vlade Švicarske.

Zagreb, December 4th 2018

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ACRONYMS, ABREVIATIONS AND MAIN DEFINITIONS

ACRONYMS AND ABREVIATIONS

B&H	Bosnia and Herzegovina
DMO	Destination Management/Marketing Organization
ETC	European Travel Commission
EU	European Union
eWOM	Electronic Word of Mouth
GCC	Gulf Cooperation Council
ME	Middle East
MTEs	Memorable Tourism Experiences
VFR	Visiting friend and relatives
UGC	User Generated Content
UAE	United Arab Emirates
USA	United States of America
UNWTO	United Nations World Tourism Organization
WOM	Word of Mouth

MAIN DEFINITIONS[1]

Tourism	Activity of visitors taking a trip to a main destination outside their usual environment, for less than a year, for any main purpose, including business, leisure or other personal purpose, other than to be employed by a resident entity in the place visited.
Inbound tourism	Visits to a country by visitors who are not residents of that country.
Outbound tourism	Visits by residents of a country outside that country.
Usual environment	For tourism statistics, usual environment means the geographical area, though not necessarily a contiguous one, within which an individual conducts his regular life routines and shall be determined on the basis of the following criteria: the crossing of administrative borders or the distance from the place of usual residence, the duration of the visit, the frequency of the visit, the purpose of the visit.
Visitor, tourist, same-day visitor	A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips. A visitor is classified as tourist (or overnight visitor), if his/her trip includes an overnight stay, or same-day visitor (or excursionist), if his/her trip does not include an overnight stay.
Tourist accommodation	Tourist accommodation is classified in the following groups: Rented accommodation and Non-rented accommodation.

[1] Eurostat, https://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Tourism; UNWTO, Definitions - Committee on Tourism and Competitiveness (CTC), http://cf.cdn.unwto.org/sites/ all/files/pdf/unwto_tourism_definitions.pdf; UNWTO, Glossary of tourism terms http://statistics.unwto.org/sites/all/files/docpdf/glossaryterms.pdf

Tourist accommodation, rented	Tourist accommodation establishment means a local kind-of-activity unit providing as a paid service (although the price might be partially or fully subsidised) short-term or short-stay accommodation services. Tourism accommodation establishments are classified and described in groups according to Section I.55 of NACE Rev. 2 classification as follow: 55.1 (hotels and similar accommodation), 55.2 (holiday and other short-stay accommodation) and 55.3 (camping grounds, recreational vehicle parks and trailer parks).
Non-rented accommodation	Accommodation provided without charge by relatives or friends; accommodation in own holiday home (owned dwelling; including timeshare and permanent caravan or camping).
Tourist night (overnight)	Each night a guest / tourist (resident or non-resident) actually spends (sleeps or stays) in a tourist accommodation establishment or non-rented accommodation.
Length of tourism trips	The length of tourism trips (involving at least one overnight stay) falls into two categories: long tourism trips are trips with at least four overnight stays and short tourism trips are trips with one to three overnight stays. The average length of stay for a number of tourism trips is calculated by dividing the total number of nights spent by the total number of tourism trips.
Destination Management/Marketing Organization (DMO)	DMO is the leading organizational entity which may encompass the various authorities, stakeholders and professionals and facilitates tourism sector partnerships towards a collective destination vision. The governance structures of DMOs vary from a single public authority to a public/private partnership model with the key role of initiating, coordinating and managing certain activities such as implementation of tourism policies, strategic planning, product development, promotion and marketing and convention bureau activities. The functions of the DMOs may vary from national to regional and local levels depending on the current and potential needs as well as on the decentralization level of public administration. Not every tourism destination has a DMO.
Tourism Product	A Tourism Product is a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific center of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a life-cycle.

EXECUTIVE SUMMARY

Research scope	• To provide sound research insights and explanations on holiday planning and trip decision making process of key inbound and potential inbound tourism markets for Bosnia and Herzegovina as a tourism destination
Research method	• Secondary research/desk research based on relevant and reliable secondary data from 2012 to 2018
Key inbound tourism markets for B&H	European: Austria, Croatia, France, Germany, Ireland, Italy, Poland, Serbia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom Non-european: China, Kuwait, Republic of Korea, Saudi Arabia, UAE, USA

HOLIDAY PLANNING AND TRIP DECISION MAKING PROCESS - MAIN RESULTS AND RECCOMMENDATIONS PER B&H INBOUND TOURISM MARKET

European markets

Overview

- Sun & beach holiday and visiting family/friends/relatives (VFR) are the most important reasons for going on holiday for European travelers
  - Wellness/spa/health treatment outstandingly popular reason for going on holiday among Swedish travelers
- Recommendations by friends or relatives are the most important information source, followed by websites
  - Websites are the most important information source for Italian travelers, while personal experience has outstanding importance on the Slovenian and Swedish markets
- Europeans are mostly independent travelers
  - Travel package most popular amongst Austrian, German and Swedish travelers
- Majority book transport and/or accommodation in advance, with the online commercial services a preferred booking method

Key recommendations

- Tourism product development and promotion should be focused on ‘city break holidays’, themed around culture (historical heritage, museums, tours), lifestyle and nature
- Develop products and experiences for longer stay to encourage exploration of regions
- Identify environmentally friendly practices and stress it in products offered
- Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits as it is important in building destination loyalty
- Promote high quality accommodation
- Online commercial services should be available for booking
- Promotional activities should be dominantly pursued through the Internet
- Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure
- Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning

- Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays for the older segments of travelers preferring over-the counter travel agencies and package travel
- Devise marketing strategies for joint product development and cross-marketing
- Consider launching a promotional campaign during summer along the Croatian coast to capture European markets
  - Offer good value for money and promote natural beauties and hospitality to attract German and Polish travelers
  - Work on monitoring and improving safety and build it into marketing to create favourable perception on German travel market
  - Promote high quality accommodation, gastronomic offer, excursions and shopping possibilities to attract German travelers
  - To attract Turkish travelers build a story line on culturally similar yet different; draw on history to develop key story lines and appeal to nostalgia
  - Promote wellness/spa/health treatment programs on the Swedish market

China

Overview

- Holiday travelers are primarily motivated by cultural and historical heritage, but nature is also very important
- Usually travel to major cities
- The main concerns for Chinese outbound travelers are language barriers, safety and cultural differences
- Internet is the most important source of information when planning travel
- Organized multi-destination package tours are popular type of holiday
- Offline services are the most popular booking method

Key recommendations

- Top 8 tips to win the Chinese:
  - Make your services „China friendly“
  - Storify your services
  - Provide WiFi
  - Set the stage for interaction
  - Let them shop
  - Emphasize the value of your services (use phrases that attract Chinese)
  - Accept Chinese travelers with open arms
  - Learn a few useful Mandarin Chinese phrases
- Tourism product development should be focused on tailor-made travel packages themed around culture, celebrities, cities and gastronomy
- Offer organized trips with tour guides who can speak Chinese
- Destination service providers should be more flexible in payment methods, so that Chinese debit cards are accepted
- Make visa policies easier
- Arrange charter flights
- Work on improving and monitoring service quality, in particular in the accommodation establishments
- Forge B2B activities with main tour operators in the region to encourage them to include B&H in their itineraries
- Promotional activities should be dominantly pursued through the Internet

	• Promote cultural and historical attractions in cities, celebrities, good value for money, gastronomy and local friendliness • Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure; official websites in Chinese language are a great asset • Assist service providers in utilizing advantages of on-line travel agencies (e.g. tianxun.com, youzhan.com) – provide education on the presentation and positioning
ME market	
Overview	• Middle East travelers usually seek an escape from the hot weather, but also natural scenic beauties, prestige, culture, history, sightseeing attractions and shopping opportunities • Main barriers for going on a holiday in Europe are costs, need for a visa, food concerns, language barriers, safety and cultural dissimilarity • Recommendations by friends and family are the most important information source, followed by travel agencies and increasingly popular websites • Middle East is a late booking market • Five/four-star hotels and apartments/villas are the preferred type of accommodation • Travel agencies are the main booking channel

Key recommendations	• Promote cultural similarities of B&H on the Middle East market
	• Tourism product development and promotion should be focused on city trips with an emphasis on prestige, sightseeing, gastronomy and shopping
	• Develop itineraries of various length to encourage exploration of regions
	• Create programs for families with children
	• Develop all-inclusive offer
	• Work on improving and monitoring service quality, in particular in the accommodation establishments
	• Promote high quality accommodation
	• Provide basic cultural requirements
	• Provide help with acquiring a tourist visa
	• Tips for doing business with tour operators
	  o Introduce new products
	  o Bundle secondary destinations together
	  o Educate agents
	• Tips for doing business for hotels
	  o Work closely with travel agencies rather than trying to sell directly
	  o Focus on all-inclusive offer
	  o Provide basic cultural requirements
	  o Assure privacy
	  o Offer halal food and a wide selection of soft drinks
	• Create programs for family activities, promote offer for children
	• Promotional activities should be dominantly pursued through travel agencies
	• Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays

South Korea	
Overview	• The most important factors in destination choice are safety, value for money, suitability for family holiday, attractiveness of destination, natural beauties and gastronomic offer • Trips to Europe are most often booked online • Round trips are dominant type of outbound trips to Europe
Key recommendations	• Tourism product development and promotion should be focused on organized multi-country round trips themed around family holiday, nature, gastronomy • Provide safety and good value for money • Work on improving and monitoring service quality, in particular in the accommodation establishments - promote high quality accommodation • Promotional activities should be pursued through the Internet • Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure • Assist service providers in utilizing advantages of on-line travel agencies (e.g. Hanna Tour, Interpark Tour) – provide information and education on the presentation and positioning • Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays • Devise marketing strategies for joint product development and cross-marketing • Consider launching a promotional campaign during summer along the Croatian coast to capture this market
USA	
Overview	• Value for money, once-in-a-lifetime experience and activities available are amongst the most important factors in choosing a destination • Authenticity and rest/relaxation are the main experiences they seek while travel • Airlines are the most important information source, followed by online travel agencies and personal recommendations • Booking directly through airlines and internet booking services are the most popular booking methods
Key recommendations	• Develop packages and products with an emphasis on authentic experience, themed around cities, sightseeing, shopping and gastronomy • Offer excursions to cultural attractions and nature parks • Offer good value for money • Various activities should be available in a destination • Promotional activities should be dominantly pursued through airlines and online travel agencies • All promotional channels and tools should give complete and detailed information on a destination

1. INTRODUCTION

The Institute for Tourism from Zagreb, the public institute with almost 60 years of experiences in tourism research and consulting in Croatia and regionally, won a tender for the service put out by Market Makers on website *posao.ba* in November 2017. The Contract for the requested service titled as "RESEARCH ON HOW TOURISTS ARE SELECTING AND BOOKING HOLIDAY DESTINATIONS: INSIGHTS INTO BEHAVIOUR OF POTENTIAL TOURISTS FROM KEY MARKETS AND HIGH POTENTIAL MARKETS FOR INCOMING TOURISM IN BOSNIA AND HERZEGOVINA - Part 1: Secondary research" is signed on December 27th 2017.

The aim of the requested service, as specified in Terms of Reference, is to provide sound research insights and explanations on travel behavior of 5 to 10 key inbound tourism markets and 5 to 10 potential inbound tourism markets for Bosnia and Herzegovina (B&H) as a tourism destination, relaying entirely on secondary/desk research. Specifically, the main tasks are:

1. To create high quality research design to meet the requirements;
2. To conduct secondary research (analysis of secondary data sources)/systematic literature review, exploring relevant studies (no older than 5 years) in order to:
   - Identify key and high potential B&H tourism inbound markets
   - Reveal relevant information to outbound tourist decision-making process and holiday planning at the key and high potential tourism markets for B&H;
3. To produce research report combining:
   - Findings from the systematic literature review; and a set of recommendations for B&H tourism industry, including travel agencies, private sector, and public tourism organizations on product/service development and marketing (per country and per sociodemographic segments).

Following the proposal of the selection criteria for identification of key current and emerging inbound tourism markets, the first report on the methodological approach and detailed research plan, and the draft report, this final report is summarizing the project findings. Section 2 is outlining a market selection criteria and markets selected according to the criteria. Section 3 is revealing a general information regarding the tourist decision-making process. Outlined are obstacles in the decision-making process and managerial implications. General characteristics of the two most important consumer segments at the travel market today, 'baby boomers' and 'millennials', are also given. Section 4 is highlighting outbound tourism demand per selected markets, and, accordingly, is giving the main recommendations regarding tourism product development and marketing activities for B&H main tourism stakeholders. Section 5 is giving general recommendation and suggesting future research plan. The last section (Literature and Data Sources) is listing the complete set of documents the secondary research has been based on. The detailed markets' information per market are given in the Appendix.

2. IDENTIFICATION OF KEY CURRENT AND HIGH POTENTIAL B&H TOURISM INBOUND MARKETS

Selection criteria for current key inbound tourism markets

1. Importance of current inbound tourism demand in B&H – share of overnights by individual inbound tourism markets in total inbound tourism demand in commercial accommodation facilities

Selection criteria for potential/emerging inbound tourism markets

2. Current inbound tourism markets in B&H with a high growth potential (percentage increase by individual market)
3. Characteristics of Croatian inbound tourism demand (share of individual market and percentage of growth)
4. Characteristics of European outbound tourism markets (number of outbound trips by individual market)
5. Characteristics of world outbound tourism markets (number of outbound trips and expenditures by individual market)

Relaying on the selection criteria, we identified all together eight key current markets of B&H inbound tourism demand and eight potential/emerging tourism markets. The list of emerging outbound tourism markets was extended by six additional markets based on the following criteria: Austria (the 7th EU outbound market and already important market for Croatia), Republic of Korea (they doubled their stay in B&H since 2014 and are considered as high potential for B&H), Kuwait (based on the length of stay in B&H they are the second one with an average of 3.7 overnights), Switzerland (growing incoming market in Croatia, and the 4th EU outbound market since 2013), Sweden (although decreasing in the global travel EU market since 2013, they are still in the top 10; furthermore, a foreseen entry of new low-cost carrier between the two countries could potentially increase the significance of the Swedish market), and Spain (one of the largest EU outbound markets with foreseen increase of the importance due to entry of new low-cost carrier between the two countries).

The key current inbound tourism markets:

1. Croatia
2. Serbia
3. Turkey
4. Italy
5. UAE
6. Slovenia
7. Poland
8. Germany

The key emerging outbound tourism markets:

1. UAE
2. Poland
3. Germany
4. Saudi Arabia
5. USA
6. France
7. China
8. United Kingdom
9. *Austria*
10. *Switzerland*
11. *Sweden*
12. *Spain*
13. *Ireland*
14. *Republic of Korea*
15. *Kuwait*

There are all together 20 inbound tourism markets for B&H selected, since some of the markets such as UAE, Poland and Germany satisfy the selection criteria for both, current and emerging markets. There are thirteen European markets (Croatia, Serbia, Slovenia, Italy, Poland, Germany, France, United Kingdom, Austria, Switzerland, Sweden, Spain and Ireland), four Middle East markets (Turkey, Saudi Arabia, UAE, and Kuwait), and China, Republic of Korea and USA.

3. HOLIDAY PLANNING AND TRIP DECISION MAKING PROCESS – OVERALL INSIGHTS FROM THE LITERATURE

Tourism research has for years been focused on holiday planning and trip decision making process. Many scholars published articles dedicated to this topic (Wong, Law & Zhao, 2016; Cohen, Prayag & Moital, 2014; Mussalam & Tajeddini, 2016; Oppewal, Huybers & Crouch, 2015; Karl, Reitinger & Schmude, 2015; Smallman & Moore, 2009). The academic interest for destination choice of tourist comes from destination marketing reasons. Because of the fierce competitions of many destinations, marketing has an important task to improve all the consumer services in order to suit better to customers' needs. Although there are many views, majority of the scholars in their published articles agree on the three most important characteristics of holiday planning and trip decision making process:

- Decision-making process is one of **the most important tourism issues**: without knowledge and information about the consumers and decision-making process, destination is not able to market its products, be competitive and create comparative advantages;
- Decision-making process is a **complex one** with many influencing factors: whether to travel, where to travel, when to travel, what to do, with whom to travel, how long to stay, how much to spend;
- Decision-making process involves **a few steps** and many factors that can influence each step.

According to research conducted to highlight the process of decision-making in tourism during last decade, the generic model that can be derived from the theory for the managerial purposes can be divided into the following three steps (Van Raij, 1986; Moutinho, 1987):

STEP 1: Consumer is deciding whether to go on vacation or not having in mind different possible obstacles

STEP 2: Consumer is in phase of collecting all possible information from various sources in order to be able to narrow possible destination choices

STEP 3: Consumer is making a final decision for a holiday destination based on the level of harmonization of consumer's personal preferences and destination attributes

Important conclusion that stem from scholars' research is that destinations with their marketing and promotional activities can influence consumer decision-making process in each of the three steps. Therefore, their task is, first, to recognize all the steps of the process and its characteristics so they can create, plan and implement their marketing activities. The ability to influence destination choice processes increases the potential for destinations to be profitable by encouraging more tourists to visit destination.

During the first step a consumer is deciding about going to trip or not and is taking into account few most important barriers to travel. During this phase, destinations can influence potential tourists. The following are the important obstacles during STEP 1 of decision-making process and possible managerial implications.

STEP 1: Travel obstacles and managerial implications in deciding whether to go on vacation*

Obstacles	Managerial implications
Security/safety ○ The first dimension that consumer is evaluating ○ Complex concept (criminal, political instability, natural hazards, health threats)	• It is important to know the image of destination – is it perceived as safe or not safe? Is it influencing potential tourists' attitudes toward destination? • Promotional materials and all the information on websites should give potential tourists all needed information on safety and security issues (those destinations that are perceived as not so secure usually create promotional campaigns in different media (TV, magazines) pointing out safety issues)
Distance/Accessibility/Time and cost of travel ○ Destination choice heavily depends on transportation costs and time costs; perceived travel distance can influence decision regardless of real transportation time	• Information about transportation and connections should be included in all information and promotional materials as well as all the costs that could be involved (consumers could always choose the best possible solution if they are informed); • Destination marketing organizations needs help of travel agencies and all those selling destination products to give timely information
Costs involved – 'cost sensitive consumers'	• Distant tourism destinations can give arrangements and offers with costs that could be acceptable by potential tourists – all costs involved in holidays should be highlighted; various accommodation options that influence spending while staying in destination have to be pointed out; simple booking procedures could help hotels/accommodation facilities to attract cost sensitive consumers

*) Sources: Wong, Law & Zhao (2016); Karl, Reitinger &Schmude (2015).

During STEP 2 potential tourists are trying to find out numerous information about possible destination(s) in order to narrow their choice. Tourism demand research confirm that consumers are using multiple sources of information[2], therefore destinations should work on several promotional activities and communication tools that they use for their target markets. Sources of information that can influence the most consumers' destination choice are described and some managerial implications are pointed out in the next table.

[2] This was also confirmed by the last survey on the attitudes and expenditures of tourists in Croatia – TOMAS Summer 2017. Although the primary source of information for tourists is internet, especially for those visiting Croatia for the first time, use of other sources of information in addition to internet is also increasing, especially media sources such as TV, radio and printed material (magazines, newspapers).

STEP 2: Sources of information in process of narrowing destination choice and managerial implications*

Sources of information	Managerial implications
Internet ○ Became most important source of information for trip planning ○ Majority of those that are informed through internet are also on social media (Facebook, Twitter, Instagram and other)	• Information through web page should include all necessary information (destination attributes, hotel prices, places to stay, maps or driving directions, things to do at destination, potential destinations in vicinity, travel discounts, dining and entertainment, events' calendar, stores or other places to shop, visitor centers at destination); timely and relevant, trustworthy and objective information are prerequisite • Destinations have to work on their clear presentation in social media in order to reach customers who share the same interests • Usability and ease of use of the internet is very important (website design, security, trust, personalized services) • Online videos and storytelling platforms are playing an increasingly significant role in supporting trip planning • Social networking sites and photo/video-sharing sites have become more popular as well as live chats with travel experts
On-line agencies ○ On-line travel agencies and supplier sites as well as destination sites are popular websites travelers are using for planning	• Destination need to have regular information exchange with on-line travel agencies and suppliers in order to offer relevant and prompt information on destination through their web pages
Word of mouth ○ Electronic WOM – enormous influence on travel planning; eWOM becomes more prevalent ○ WOM is still very important, credible and influential agent for destination image and destination choice ○ eWOM contributes toward the evaluation of in-destination choices, particularly at a micro-destination level ○ Social media offers ways to address negative WOM and eWOM	• eWOM - less credible than WOM but may have greater exposure and accessibility over the internet • Both WOM and eWOM depend on personal experiences with destination products and this means taking care, monitor and improve quality of many destination features • Important for DMOs to know dominant consumers discourses in terms of their target markets (what are the main consumer preferences) • Looking at comments/materials posted by other travelers and reading travel-related blogs can give many ideas on how to improve some services and/or destination products
Printed materials (brochures, guide books, magazines, newspapers)	• Some consumers are seeking for more comprehensive and less biased judgment;

○ Traditional media remain relevant; complementary to internet	travelers are seeking for product advise from offline channels; these are usually more detailed information • Destinations have to focus their advertisements in magazines relevant for their target markets
Media (TV, radio, movies) ○ Traditional media remain relevant, even become more important in last several years (growth of TV, radio and movies as information sources) ○ Media is complementary to the internet	• Destination need to find out what target markets are responding best to traditional media – TV, radio – and to target their campaigns in time and in media used by their target markets (broadcasting companies usually have information about their audience and watching time)

*) Sources: Xiang, Magnini & Fesenmaier (2014); Xiang, Wang, O'Leary & Fesenmaier (2014); Tham, Croy & Mair (2013); Molina & Esteban (2006).

Internet continues to be the number one source of information in trip planning which suggests that travelers are very technology dependent in seeking and preparing for their travel experiences. The availability of the internet anytime and anywhere has profound impact on travelers' information search and planning behavior. Traditional travel products such as air tickets, accommodation, rental cars continue to dominate the online travel market but the others such as museum tickets and tickets for certain events are also becoming more important. Some authors (Mottiar & Quinn, 2004) emphasize the fact that women have a dominant role in the early stages of the decision-making process and that can influence marketing managers in their choice of promotional media used.

In the next phase, consumers are choosing between several destinations and destination marketers have difficult task to tailor their products/experiences according to many consumer characteristics that become bases for market segmentation. Because of many personal characteristics (socio-demographics, psychographics, behavioral characteristics etc.) destination marketers usually rely on more general consumer trends, that are specifying those characteristics that are the most important for buying products and/or services including destination products. The most important consumer segments at the travel market today are 'baby boomers' and 'millennials'.

Baby boomers

'Baby boomers' are generation born between 1946 and 1964, thus those aged 54 and over. They represent the largest consumer group in the U.S. Contrary to millennials (i.e. those aged 23 to 38), they do not tend to mix business with pleasure very often. Baby boomers travel less often than younger generations. They usually use air travel. Hotels are dominant accommodation choice. Most boomers participate in either an airline and/or hotel loyalty program and will book through these companies more often than not. They are usually accompanied by a partner.

Boomers are less motivated by desire for adventure, new experiences and health improvement compared to millennials. The main motives for going on a vacation are spending time with family and friends, relaxation, getting away from normal everyday life and sightseeing. They love culture, museums, and art. The majority of baby boomer leisure travelers choose a destination based on its cultural values. Cities are the most popular type of destinations. However, baby boomers are seeking more specialized experiences. Instead of traveling to the most-visited countries in Europe like

England, France or Spain, U.S. baby boomers are leaning toward smaller tours to less visited countries in Central and Eastern Europe.

In their travel planning they are less influenced by the social media posts than millennials. Baby boomers often have a list of the places they want to visit and they know where they want to go next. They often rely on word of mouth from family and friends when planning their travel. Nevertheless, baby boomers are becoming increasingly reliant on technology when booking their travel. Online travel agencies are popular choice for researching and booking a trip, while online review websites are also influential in booking decisions. Baby boomers are generally well informed, and spend a great amount of time researching their destinations, which local attractions to visit or where to eat. Their decisions are often influenced by ads with informative content. While they are not tied to a strict budget, they look for the best deals. The majority are influenced by accommodation prices when planning their travel. Many are prone to booking luxury services, including upgraded tour and activity packages.

Millennials

'Millennials' are generation born between 1980 and 1995, thus those aged 23 to 38. They had a great impact on travel industry, shaping the way people travel. Driven by the social media and seeking experiential adventures, this generation of travelers introduced sharing economy and re-invented hostels. Millennials are highly influenced by digital technology, having been living in a digital world of smartphones and laptops ever since they can remember. Digital technology plays a huge role in their travel activities. They search for travel information online, usually on their mobile phones. Both flights and accommodations are usually booked on mobile; thus, millennials are driving the demand for mobile capabilities.
Millennial travelers prioritize meaningful and adventure-focused experiences, rather than things. Relaxing holidays are becoming a thing of the past. Active and adventurous travel is almost a must, and they search for authentic experiences. Their demand for memorable experiences over material goods has created what many call the experience economy. The majority consider traveling as a necessity and not a luxury. They see trips as an educational opportunity, and want to get integrated with the local culture and an authentic local experience, whether cultural, natural, artistic or culinary. For many millennials traveling is also an opportunity for self-discovery. While on travel, they often engage in hiking and cycling activities, and other activities that provide health benefits. The availability of healthy food is a very important factor in booking a holiday.

For millennials, travel is no longer a well-planned venture booked well in advance. Millennials travel more than other generations, but spend less than generation X and baby boomers. They prefer taking multiple trips versus just one big trip, and often stay in cheaper accommodation (rented rooms, hostels, camping, etc.) to preserve their financial resources. Low cost airlines are their means to get to the destination. They often travel with their friends. Millennial travelers look online for travel inspiration, especially social media channels such as Facebook, Instagram and Pinterest. Social media is the trigger, and the place to share their travel experiences with their friends and a larger online community. They search for the "cool factor" and individualistic aspect in their travels and want an interesting story to share. Technology is a crucial factor that makes millennials different from older generations, and allows them to access information instantly. Technology has become a key player in travel, for both the traveler and the industry service provider. On average, a millennial will check about ten sources before booking, mostly review sites, to get the real opinions about hotels or restaurants from other travelers.

Rather than trying to develop premium travel products, adding a unique experiential element to the basic travel journey might be more productive in attracting millennials. Destinations need to offer unique experiences, such as music festivals, cultural and culinary events. Traditional attractions such as old buildings and churches are not sufficient anymore. Furthermore, it is mandatory that service providers generate up-to-date, real-time and accurate information on their websites, which should be mobile-optimized. Since millennials rely on reviews before booking, social media and review sites should be constantly monitored. Other than a clean bed, free wi-fi is probably the number one item millennials seek in accommodation establishment. Promoting social responsibility and sustainable travel is very important to millennials, and they tend to stay in eco-friendly properties.

STEP 3a: Personal consumer characteristics and trends and managerial implications*

Consumer characteristics/trends	Managerial implications
"Challenging aging"; "Consumers in training, "The Millennials" ○ In 2017 almost a quarter of everyone on the planet is over the age of 50, a record number; these consumers are transforming - what it means to be older in terms of lifestyle and are more demanding in their consumption needs ○ Middle-aged and older consumers who act younger than their years ○ Today's families are more relying on youngsters – parents seek their kids' opinions about all kinds of decisions including travel decisions ○ Millennials will outnumber the non-millennials by 2030 (USA) – labelled also as Now Generation – they are accustomed to sharing their life's activities through social media – they are budget-conscious young travelers	• All health tourism products/programs are important and health aspects of destination should be highlighted/ecotourism products and healthy local/regional products • Middle-aged tourists ('Midorexia') are focusing on health, wealth and self, therefore destination products and destination positioning should emphasize destination features that are harmonized with these needs • Tourism campaigns should focus on the segment of younger tourists if families are among main target markets; generation Y, known as Millennials could also become important market segment (they want everything now – real time information, they expect speed and efficiency in their travel, they prefer fast-casual restaurants, prefer automated kiosk check-ins – flexibility of service is important for this segment; they prefer expert opinion – reviews on their mobile devices, also prefer a local experience in a non-touristy neighborhood) • Long-term sustainable destination development that requires participation of all destination stakeholder is needed • Active travelers – destinations need to develop many possibilities for all ages for active holidays • Tourism products have to offer possibility to get to know local lifestyle
"The allure of authenticity" ○ Authenticity has been identified as one of the key word in selling products and destinations as well	• Destinations should define their authenticity characteristics that are appealing to their markets and base their USP on them (authentic eating, adventure travel companies, urban hotels, self-improvement seminars – broad range of possible experiences)
"Greener food"	• Destinations have to offer a variety of gastronomic experiences; 'food and wine' are

○ Fast food is getting greener (flexitarians – meat eaters that want to eat more plants) ○ Customers are demanding new food culture in a bid to be healthier and live a better lifestyle	motivating more travelers to visit destinations with rich gastronomic offer • Combination of gastronomy and culture and cultural events in a destination proved to be successful products • "Green" trend relies to every aspect of destination offer especially environment (landscape and parks, walking areas, eco and regional products as souvenirs)
"Personalize it" ○ Usually senior travelers; focus is often based on special interest	• Products have to be customized or personalized • Personalization is also about adding a persona face to a brand • Destination tourism packages should be tailored to the needs of specific target markets – destinations should define and focus their marketing efforts on target markets • Opportunity for travel agents especially when they are losing their competitive advantages to online agents
"Privacy and security" ○ Security is already defined as one of the possible obstacles to travel to a destination ○ They prefer travelling with a family	• Personal safety: all aspects concerning health (consumers are losing their confidence in traveling with mobile technology) • Destinations have to have knowledge on all the aspects of their image on their main generating markets including safety so they can plan their image campaigns • Family vacations have strong appeal to this segment
"Wellness as status symbol" ○ The desire to be fit and healthier seems to be almost universal – healthy living is becoming a status symbol	• There are many aspects of wellness – the most important are wellness holidays that are promoting the idea that consumers can take some time off, transform themselves and return as better, happier person ('refresh your body and mind' products are welcome; holistic wellness packages, medical tourism, wellness and fitness tourism are becoming more common) • Destinations should develop product/packages that satisfy the need for health and wellness based on their natural attractions and authenticity

*) Sources: Euromonitor International (2018),"Top 10 Global Consumer Trends for 2017"; Cohen, Prayag & Moital (2014).

In this last phase, when consumer if deciding between many similar tourism destinations, it is important for consumers to know details about destination features because that information can prevail in the process of decision-making. As there are many destination attributes that can be important for certain tourist segments, only the most important attributes are pointed out and managerial implications that could help destination marketing organizations and all those offering a part of 'destination experience packages'.

STEP 3b: Important destination attributes and managerial implications*

Destination attributes	Managerial implications
Destination/brand reputation: safety &security, image, perceived service quality, price, value for money, quality of food	• Research on destination/brand reputation is needed • The more familiar and developed destination image, the less perceived uncertainty the potential tourist has about destination; when a destination manager develops a positive destination image it becomes more likely that this destination will be considered in the choice process and will compare favorably with personal travel motivations and needs • It is important to distinguish between the perceived attributes on different geographic and consumer markets
Tourism attractions: architecture, location, natural resources, culture, relaxation &health, entertainment, events, festivals	• Make a list of most important attractions (are they presented according to tourists needs – accessibility, information, promotion)
Tourism infrastructure: access to the destination, shopping, sports facilities, efficiency of transportation	• These attributes are important for all markets; strengths and weaknesses should be defined and improvement plan should be developed
Tourism services: quality & variety of accommodation, food and wine, availability of tourist information	• Also important for all markets; strengths and weaknesses should be defined and improvement plan should be developed

*) Sources: Mussalam & Tajeddini (2016), Molina & Esteban (2006).

Research studies also showed that research context and destination attributes effect decision-making process and that leads to the conclusion about importance of conducting primary research because of specific and context oriented research instruments. More specific information can help destination to work on its tourism marketing plan.

Literature review for the need of this study also revealed the importance of memorable tourism experiences (MTEs) that has lately been in focus of many scholars. Therefore, many authors, from their research studies derived the conclusion that providing visitors with memorable tourism experiences is important for achieving success in the highly competitive tourism marketplace (Sun Tung & Ritchie, B., 2011; Kim, J. H., 2014). Another study suggested that MSEs are composed of the following seven dimensions: hedonism, refreshment, social interaction and local culture, meaningfulness, knowledge, involvement and novelty (Kim, J. H., Ritchie, J. B., & McCormick, B., 2012). The study also showed that various destination attributes significantly affect visitors at different stages. For example, a favorable image of a destination formed by a combination of the destination's attributes (e.g. beautiful landscape, shopping opportunities, culture exchange, infrastructure, safety and activities) significantly affects individuals' destination choices.

4. HOLIDAY PLANNING AND TRIP DECISION MAKING PROCESS - MAIN RESULTS AND RECCOMMENDATIONS PER B&H INBOUND TOURISM MARKET[3]

AUSTRIA[4]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its sizeable travelling population, geographic proximity together with a preference for driving to a holiday destination • Most Austrians travel to geographically close destinations in Germany, Italy and Croatia • A huge majority (84%) travel at least once per year, realizing 1.7 million trips and 11.5 million overnights, of which 83% are private • Every second tourist is over 45 years of age (although 58% of all Austrian tourists in Croatia, during summer, are younger than 45) • Potentially important market for a range of B&H tourism products as they travel to cities (45%), seaside (40%), but also to countryside (26%) and mountain regions (6%) • Every fourth traveler is primarily motivated by sun & beach holiday, but important reasons for going on holiday are also enjoyment in nature (14%), visiting family/friends/relatives (VFR) (13%), culture (13%) and city trips (12%); the importance of culture is increasing, while the importance of sun and sea is decreasing with age; those visiting Croatia are primarily motivated by sun & beach holiday (39%), new experiences (36%), visiting natural attractions (33%), sport and recreation (32%) and gastronomy (31%) • Influence of environmentally sustainable practices in destination selection is significant – more than a third of travelers is influenced by environmentally friendly practices (in transport, accommodation, destination, services), going as high as 68% of those younger than 25; but also significant among those older than 54 where 59% can be swayed to a destination based on the environmentally friendly practices • Nature (23%), quality of accommodation (20%) and cultural and historical attractions (16%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (60%), closely followed by websites (53%) - from a destination perspective, it is especially important that 26% of tourists rely on the information provided by an official web-site or the site of a destination service provider

[3] By alphabetic order

[4] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

Booking/ transaction behavior	• Austrians are mostly independent travelers; however, a relatively large proportion (36%) purchases a travel package • Majority (87% to 94%, depending on the source), however, book transport and accommodation in advance - online commercial services are a dominant booking method (54%), where online travel agencies (i.e. booking.com) are much more preferred at the moment than services listing private accommodation (i.e. Airbnb); Austrians visiting Croatia prefer booking directly with the accommodation facility, 24% online and 31% in person (by telephone, email or fax) • As expected, large proportion of older travelers are more reliant on over-the-counter travel agency (23% as opposed to 10% of those 25 years of age or younger)
Planning/trip behavior	• Austrians travel with a partner (39%), family (including children) (28%) or friends (23%), with younger travelers more often with friends and older with a partner; travelling with a partner is more represented among the Austrian tourists visiting Croatia (52%) • Most outbound trips are up to seven days (33% up to three and 42% from four to seven days) • Hotel is still the preferred type of accommodation for 73% of those staying in rented accommodation; private/household accommodation and camping are far less popular (with 22% and 5% respectively); camp sites are more popular in Croatia (25% of Austrians, during summer months, stay in camp sites) • Austrians prefer land to air travel (65% use land transportation on outbound holiday trips); they travel mostly by private car (49%); about a third travel by plane; they travel to Croatia almost exclusively (more than 90%) using car/camper/motorcycle • On average, 854 € is spent per outbound holiday trip, or about 128 € per day – 41% on accommodation, 31% on transport and 28% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Cities are popular type of destination among Austrian travelers • A range of motives pull Austrians towards a destination • Most of Austrians travel on trips of up to 7 nights • Hotels are the preferred type of accommodation, while high quality accommodation is an important factor of loyalty to a destination • Austrians prefer driving to geographically close destinations » *Promote geographical proximity of B&H on the Austrian market* » *Tourism product development and promotion should be focused on 'city break holidays'* » *Develop tourism products based on a range of activities, themed around culture (historical heritage, museums, tours), lifestyle and nature* » *Identify environmentally friendly practices and stress it in products offered* » *Target empty-nesters (45 to 65) with culture-based and young with nature based products/activities* » *Develop products and experiences for short (two to three nights) and longer (up to a week) stay* » *As B&H is the new destination for Austrians, develop itineraries of various length to encourage exploration of regions, themed around culture, lifestyle and nature*

	» *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits from this market as it is crucial in building destination loyalty* » *Promote high quality accommodation* » *Improve the accessibility of a destination by means of road transport, the organization of traffic in a destination and the transport infrastructure, such as the accessibility of parking places, as all these are the important aspects of destination attractiveness/offer*
Promotion	• Internet is an important source of information for the majority of Austrian travelers • Websites are the most important online information source for potential travelers • A large number of Austrians holiday in Croatia » *Promotional activities should be dominantly pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning* » *Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays for the older segments of travelers preferring over-the counter travel agencies and package travel* » *Devise marketing strategies for joint product development and cross-marketing* » *Consider launching a promotional campaign during summer along the Croatian coast to capture this market*
By segments	• **Young friends/families**: sun & beach stands out as the main reason for going on holiday; the majority rely on recommendations of friends and relatives, websites and personal experience for information search when making decisions about a holiday; the quality of accommodation is the most important factor in building destination loyalty; the majority use online commercial services to book holiday » *Target young travelers with good prices and value for money of accommodation* » *Monitor service quality in the accommodation establishments* » *Improve/develop websites of destinations and service providers* » *Online commercial services should be available for booking* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning* • **Older couples**: culture stands out as the main reason for going on holiday; they rely more on guidebooks and magazines, personal contact with travel agencies and newspapers/radio/TV when making decisions about a holiday than the segment of young friends/families; the recommendations of friends and relatives, personal experience and websites are somewhat less important, but still relevant sources of information; booking over the counter at a travel agency is the preferred booking method, followed by online commercial services

- » *Target older travelers with culture-based products (cultural heritage and variety of cultural events)*
- » *Create packages that include visiting different cities*
- » *Traditional methods of promotion should be focused on older travelers – guidebooks and magazines, travel agencies and newspapers/radio/TV should be a part of means for promotional activities*
- » *Offer various travel packages through travel agencies*

CROATIA[5]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its geographic proximity together with a preference for driving to a holiday destination • Most Croatians on their outbound trips travel to geographically close destinations in Germany, Italy and Austria • Majority of Croatians (72%) travel at least once per year, realizing 1.6 million trips and 8.6 million overnights, of which 75% are private trips • Every third outbound traveler is between 45 and 64 years of age • Potentially important market for city tourism as they often travel to cities (43%) on their outbound holiday trips • Every third traveler is primarily motivated by sun & beach holiday and every forth traveler by visiting family/friends/relatives • Influence of environmentally sustainable practices in destination selection is significant – half of travelers are influenced by environmentally friendly practices (in transport, accommodation, destination, service providers); younger tourists pay more attention to environmentally friendly practices, especially to accessibility of a destination by a means of transport with low impact on environment • Nature (22%), cultural and historical attractions (16%), general level of prices (12%) and quality of accommodation (11%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (50%), followed by websites (35%) and personal experience (34%) - from a destination perspective, it is especially important that 19% of tourists rely on the information provided by an official web-site or the site of a destination service provider; websites are more popular source of information among younger tourists
Booking/ transaction behavior	• Croatians are mostly independent travelers; every fifth outbound trip is organized as package travel (21%) • Majority (74%) does not book trip in advance, but among those who do online commercial services are a dominant booking method (23%), where services listing private accommodation (i.e. Airbnb) are more preferred now than online travel agencies
Planning/trip behavior	• Croatians travel with family (including children) (28%), a partner (26%) or friends (19%), with younger travelers more often traveling with friends and older with a partner • Most outbound trips are up to seven days (53% up to three and 31% from four to seven days) • Staying at relatives or friends is the preferred type of accommodation on 41% of outbound holiday trips, while 39% include hotel accommodation; other rented accommodation is less popular (16%)

[5] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

	• Croatians prefer land to air travel (85% use land transportation on outbound holiday trips); they travel mostly by private car (54%), with only 15% by plane • On average, 358 € is spent per outbound holiday trip, or about 69 € per day – 28% on accommodation, 36% on transport and 36% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Cities are the most popular type of destination for Croatian travelers • Most travel on trips of up to 7 nights • Staying at relatives or friends is the preferred type of accommodation • Croatians prefer driving to geographically close destinations » *Promote geographical proximity of B&H on the Croatian market* » *Tourism product development and promotion should be focused on 'city break holidays'* » *Develop tourism products based on a range of activities, themed around cities, nature and culture (historical heritage, museums, tours)* » *Identify environmentally friendly practices and stress it in products offered* » *Develop products and experiences for short (two to three nights) and longer (up to a week) stay* » *Improve the accessibility of a destination by means of road transport, the organization of traffic in a destination and the transport infrastructure, such as the accessibility of parking places, as all these are the important aspects of destination attractiveness/offer*
Promotion	• Internet is an important source of information • Websites are the most important online information source for potential travelers » *Promotional activities should be dominantly pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. AirBnB, booking.com) – provide information and education on the presentation and positioning* » *Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays for the older segments of travelers preferring over-the counter travel agencies*
By segments	• **Young friends**: sun & beach stands out as the main reason for going on holiday; the majority rely on recommendations of friends and relatives and websites for information search when making decisions about a holiday; cultural and historical attractions, natural features, quality of accommodation and general level of prices are the most important factors in building destination loyalty; the majority use online commercial services to book holiday » *Target young travelers with good prices and value for money of accommodation* » *Improve/develop websites of destinations and service providers* » *Online commercial services should be available for booking* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking com) – provide information and education on the presentation and positioning*

- **Older couples**: visiting family/friends/relatives stands out as the main reason for going on holiday; they rely more on personal contact with travel agencies and newspapers/radio/TV when making decisions about a holiday than the segment of young friends/families; websites are somewhat less important, but still relevant sources of information
  - » *Create packages that include visiting various natural and cultural attractions*
  - » *Traditional methods of promotion (travel agencies and newspapers/radio/TV) should be focused on older travelers*
  - » *Offer various travel packages through travel agencies*

FRANCE[6]

Market overview	
Holiday/ destination choice	• Potentially an important source market for B&H given its sizeable travelling population and purchasing power • Mediterranean destinations (Spain, Italy, Portugal) and geographically close destinations (Germany, UK, Belgium) are the top outbound destinations for French travelers • A huge majority (80%) travel at least once per year, realizing 23.5 million trips and 200 million overnights, of which 89% are private trips • Majority (53%) of outbound travelers are over 45 years of age, with dominant group in outbound travel being tourists aged 45 to 64 (34%) • Potentially important market for city tourism as they often travel to cities (35%), but also to seaside (25%) • Every third traveler is primarily motivated by visiting family/friends/relatives (VFR) (29%), but important reasons for going on holiday are also sun/beach (22%), nature (14%), city trips (10%) and culture (9%); • Influence of environmentally sustainable practices in destination selection is significant – almost half of travelers are influenced by environmentally friendly practices (in transport, accommodation, destination, service providers), with most important being the introduction of sustainable/environmentally friendly practices in the destination (21%) • Nature (36%), cultural and historical attractions (14%) and quality of accommodation (13%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (57%), closely followed by websites (50%) - from a destination perspective, it is especially important that only 17% of tourists rely on the information provided by an official web-site or the site of a destination service provider, while a high 40% of tourists rely on information provided on websites collecting and presenting comments, reviews and ratings from travelers
Booking/ transaction behavior	• Every fifth tourist usually books an all-inclusive holiday; this type of holiday is most popular among younger tourists (up to 24 years of age) (38%); other types of package travel (not all inclusive) are most popular among tourists aged 40 to 54 • Majority (89%) book transport and/or accommodation in advance - online commercial services are a dominant booking method (51%) • As expected, reliance on online commercial services decreases with the age of tourists (40% for travelers aged 55 and over compared to 68% of those younger than 25 years of age)
Planning/trip behavior	• French travelers are primarily accompanied by a partner (42%) or family (including children) (41%); traveling with a partner is dominant for other travelers (55+ years of age) (55%)

[6] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

	• Most outbound trips are from 4 to 14 nights (37%); 25% trips are from 8 to 14 nights) • Hotel is still the preferred type of accommodation on outbound holiday trips (51%), followed by other rented accommodation (24%) • French prefer air to land travel (58% of outbound holiday trips includes air transportation and 40% land transportation); regarding land transportation, they travel mostly by car (29%) • On average, 1,011 € is spent per outbound holiday trip, or about 112 € per day – 31% on accommodation, 32% on transport and 36% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Cities are popular type of destination among French travelers • A range of motives pull French towards a destination • Most outbound holiday trips last from 4 to 14 nights • Hotels are the preferred type of accommodation, while high quality accommodation is an important factor of loyalty to a destination • French prefer flying to Mediterranean destinations » *Tourism product development and promotion should be focused on 'city break holidays' and 'city tours' (visiting different towns)* » *Develop tourism products based on a range of activities, themed around nature, cultural and historical attractions, and regional gastronomy* » *Identify environmentally friendly practices and stress it in products offered* » *Develop products and experiences for longer stay to encourage exploration of regions* » *Develop itineraries with special emphasis on nature as it is crucial in building destination loyalty* » *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits of tourists from this market as it is important in building destination loyalty* » *Promote high quality accommodation* » *Improve the accessibility of a destination by means of air transport and the transport infrastructure, as all these are the important aspects of destination attractiveness/offer*
Promotion	• Internet is an important source of information » *Promotional materials should emphasize natural features of the destinations along with cultural and historical attractions* » *Promotional activities should be dominantly pursued through the Internet* » *Analyze content (and resolve issues) presented on websites collecting and presenting comments, reviews and ratings from travelers as they are one of the most important sources of information* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com); provide education on the presentation and positioning*

By segments	• **Explorers:** visiting towns, museums and exploring local gastronomy are their favorite activities; the majority rely on tourist guides and websites for information search when making decision about a holiday » *Create packages that include 'city breaks' and visiting different cities* » *Create packages that emphasize regional gastronomy along with cultural and historical attractions* » *Create specialized tourist guides in French* • ***Adventurers:*** adventure sports, trekking and water sports are their favorite activities; the majority rely on websites of travel agencies and tourist guides for information search when making decision about a holiday » *Create packages based on a range of sports activities, themed around nature* » *Create specialized tourist guides in French*

GERMANY[7]

Market overview

Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its sizeable travelling population and geographic proximity • Mediterranean destinations and neighboring countries are the top outbound destinations for Germans • A huge majority (79%) travel at least once per year, realizing 91 million trips and 770.9 million overnights, of which 89% are private trips • Every third German tourist is between 45 and 64 years of age, and every fifth is older, making these two groups the most represented age groups on German travel market • Potentially important market for a range of B&H tourism products as they travel to cities (51%), seaside (47%), but also to countryside (38%) and mountain regions (23%) • Every fourth traveler is primarily motivated by sun & beach holiday, but important reasons for going on holiday are also visiting family/friends/relatives (VFR) (21%), enjoyment in nature (15%), city trips and culture (both 9%); the importance of nature is increasing, while the importance of VFR is decreasing with age; those visiting Croatia are primarily motivated by sun & beach holiday (44%), gastronomy (36%), visiting natural attractions (31%), new experiences (30%) and sport and recreation (25%) • Influence of environmentally sustainable practices in destination selection is significant – every second traveler is influenced by environmentally friendly practices (in transport, accommodation, destination, service providers); however, only 17% of travelers find environmentally friendly practices one of the key factors in destination choice • Nature (25%), quality of accommodation (18%) and cultural and historical attractions (13%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (44%), closely followed by personal experience (39%) and websites (37%) - from a destination perspective, it is especially important that almost every fifth tourist relies on the information provided by an official web-site or the site of a destination service provider • Pictures/photos are dominant inspiring formats when choosing a holiday destination

[7] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

Booking/ transaction behavior	• Germans are mostly independent travelers; however, a relatively large proportion (32%) purchases a travel package • Package travel is particularly popular for longer holiday trips (5+ days), especially to the Mediterranean region (66%) • Majority (90%) book transport and/or accommodation in advance - online commercial services are a dominant booking method (46%), while 27% book in person at a travel agency; Germans visiting Croatia prefer booking the accommodation directly with the accommodation facility, 20% online and 33% in person (by telephone, email or fax) • Personal conversation is the most popular channel for booking longer holiday trips (5+ days), followed by online booking • As expected, large proportion of older travelers are more reliant on over-the-counter travel agency (32% as opposed to 21% of those 25 years of age or younger)
Planning/trip behavior	• Germans most often travel with a partner (41%) or family (including children) (28%); younger travelers more often travel with friends and older with a partner; travelling with a partner is more represented among the German tourists visiting Croatia (53%) • Outbound trips lasting four to seven days are the most popular (38%), followed by longer trips lasting eight to fourteen days (30%) • City breaks are the most popular type of short holiday trips (two to four days), with dominant use of hotel accommodation • Hotel is the preferred type of accommodation for 69% of those staying in rented accommodation; private/household accommodation and camping are far less popular (with 25% and 6% respectively); camp sites are more popular in Croatia (33% of Germans, during summer months, stay in camp sites) • German travelers usually use land transportation on outbound holiday trips (59%); they travel mostly by private car (44%), while 38% travel by plane; however, the choice of transportation means is dependent on trip length and destination – air travel is preferred for international city breaks (52%) and longer (5+ days) outbound trips (55%), especially to more distant Mediterranean destinations (75%); they travel to Croatia almost exclusively (about 90%) using car/camper/motorcycle • On their holidays, Germans usually go to excursions and shopping, enjoy local food and go swimming • On average, 781 € is spent per outbound holiday trip, or about 89 € per day – 44% on accommodation, 35% on transport and 21% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Besides cities and seaside destinations, popular travel destinations for Germans are also countryside and mountain regions • A range of motives pull Germans towards a destination • Good value for money, beautiful landscape, good weather/climate, hospitality and friendly people are key aspects in destination choice; safety and political conditions are also very important • Hotels are the preferred type of accommodation, while high quality accommodation is an important factor of loyalty to a destination » *Offer good value for money and promote natural beauties and hospitality to attract German tourists*

	» *Work on monitoring and improving safety and build it into marketing to create favourable perception on German travel market* » *Tourism product development and promotion should be diversified to cover different types of destinations that pull German travelers; include various day trips in destination product* » *Tourism product development for short (two to four nights) stays should be focused on 'city breaks'* » *For longer stays (five and more nights), develop itineraries that encourage exploration of regions, based on a range of activities and themed around nature, culture (historical heritage, museums, tours) and lifestyle* » *Identify environmentally friendly practices and stress it in products offered* » *Target empty-nesters (45 to 65) with nature-based products/activities* » *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits as it is important in building destination loyalty* » *Promote high quality accommodation, gastronomic offer, excursions and shopping possibilities* » *Use plenty of quality photo material in promotional activities* » *Improve the accessibility of a destination by means of road transport, the organization of traffic in a destination and the transport infrastructure, such as the accessibility of parking places, as all these are the important aspects of destination attractiveness/offer*
Promotion	• Internet is an important source of information for German travelers • Websites are the most important online information source for potential travelers • A large number of Germans holiday in Croatia » *Promotional activities should be dominantly pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning* » *Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays for the older segments of travelers preferring over-the counter travel agencies and package travel* » *Devise marketing strategies for joint product development and cross-marketing* » *Consider launching a promotional campaign during summer along the Croatian coast to capture this market*
By segments	• **Young couples/families**: rest and relaxation, beach, and spending time with family stand out as the main reasons for going on holiday; the majority rely on recommendations of friends and relatives and every second on personal experience when making decisions about a holiday; the majority use online commercial services to book holiday » *Improve/develop websites of destinations and service providers* » *Online commercial services should be available for booking* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking com) – provide information and education on the presentation and positioning*

  - » *Providers and destinations wishing to target this market should develop children/young families friendly products and services*
- **Older couples**: rest and relaxation stand out as the reasons for going on holiday; natural features are more important compared to the segment of young couples/families; the recommendations of friends and relatives and personal experience are somewhat less important, but still relevant sources of information; they more often book over the counter at a travel agency
  - » *Target older travelers with nature-based products*
  - » *Create packages that include visiting different destinations*
  - » *Offer various travel packages through travel agencies*

IRELAND[8]

Market overview	
Holiday/ destination choice	• Potentially an important source market for B&H given its purchasing power • Mediterranean destinations (Spain, France, Portugal, Italy), neighboring countries (UK) and destinations outside the EU28 (USA) are the top outbound destinations for Irish • A huge majority (82%) travel at least once per year, realizing more than 6.4 million trips and 46.6 million overnights, of which 86% are private trips • Every third tourist is between 45 and 64 years of age • Potentially important market for a range of B&H tourism products as they travel to cities (64%), seaside (38%) and countryside (12%) • Almost every third traveler (29%) is primarily motivated by sun & beach holiday, but important reasons for going on holiday are also visiting family/friends/relatives (VFR) (24%) and city trips (11%); the importance of city trips is decreasing with age • Influence of environmentally sustainable practices in destination selection is significant – about half of travelers are influenced by environmentally friendly practices (in transport, accommodation, destination, service providers) • Nature (21%), cultural and historical attractions (18%), activities/services available (17%) and quality of accommodation (16%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (54%), closely followed by websites (49%) - from a destination perspective, it is especially important that only 15% of tourists rely on the information provided by an official web-site or the site of a destination service provider, while 40% of tourists rely on the information provided by websites collecting and presenting comments, reviews and ratings from travelers
Booking/ transaction behavior	• Irish are mostly independent travelers; only 19% of travelers purchase a travel package • Majority (96%), however, book transport and/or accommodation in advance - online commercial services are a dominant booking method (65%), where online travel agencies (i.e. booking.com) are much more preferred (55%) at the moment than services listing private accommodation (i.e. Airbnb) (17%) • Booking over the phone (22%) and over the counter at a travel agency (13%) is more popular among tourists aged 55 and over compared to those younger than 25 (7% and 5%, respectively)
Planning/trip behavior	• Irish primarily travel with a partner (34%) or family (including children) (33%); with younger travelers more often with friends and older with a partner • Most outbound trips are up to seven days (28% up to three and 39% from four to seven days) • Hotel is still the preferred type of accommodation on 45% of outbound holiday trips, while 27% include staying at relatives or friends • Irish prefer air to land travel (88% use air transportation on outbound holiday trips)

[8] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base.

	• On average, 823 € is spent per outbound holiday trip, or about 106 € per day – 30% on accommodation, 33% on transport and 37% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Cities and seaside are the most popular type of destination among Irish travelers • A range of motives pull Irish towards a destination • Most of Irish travelers go on outbound holiday trips of up to 7 nights • Hotels are the preferred type of accommodation, while high quality accommodation is an important factor of loyalty to a destination » *Tourism product development and promotion should be focused on 'city break holidays'* » *Develop tourism products based on a range of activities, themed around cities, nature, culture and events* » *Identify environmentally friendly practices and stress it in products offered* » *Develop products and experiences for short (two to three nights) and longer (up to a week) stay* » *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits of tourists from this market as it is important in building destination loyalty* » *Promote high quality accommodation* » *Improve the accessibility of a destination by means of air transport and the transport infrastructure*
Promotion	• Internet is an important source of information • Websites are an important online information source for potential travelers » *Promotional activities should be dominantly pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning* » *Promotional activities should be focused on natural beauties, cultural and historical attractions and a range of activities available in a destination*
By segments	• **Young friends/families**: » *Create packages that include visiting different cities and offer various activities/services* » *Create 'city break' programs that include many cultural and historical attractions combined with excursions to natural attractions* » *Monitor service quality in the accommodation establishments* » *Improve/develop websites of destinations and service providers* » *Online commercial services should be available for booking* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking com) – provide information and education on the presentation and positioning* » *Promotional activities should be also pursued through social media* • **Older couples**: » *Create packages themed around nature and culture* » *Offer high quality accommodation (hotels and similar)* » *Monitor service quality in the accommodation establishments* » *Offer various travel packages through travel agencies*

ITALY[9]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its sizeable travelling population, geographic proximity and purchasing power • Most Italians on their outbound trips travel to geographically close Mediterranean destinations in France and Spain, or overseas to the USA • 69% travel at least once per year, realizing 10.4 million trips and 77.1 million overnights, of which 84% are private trips • Every third tourist is between 45 and 64 years of age • Potentially important market for a range of B&H tourism products as they travel to cities (40%), seaside (24%) and mountains (10%) • Every fourth traveler is primarily motivated by sun & beach holiday, but important reasons for going on holiday are also visiting family/friends/relatives (VFR) (18%), city trips (17%) and culture (14%); the importance of visiting family and friends is increasing, while the importance of sun and sea is decreasing with age • Environmentally sustainable practices in a destination are important factor in destination choice for 40% of tourists • Nature (21%) and cultural and historical attractions (14%) are a paramount in building destination loyalty • Websites are the most important information source (43%), followed by recommendations of friends, colleagues or relatives (34%) - from a destination perspective, it is especially important that 16% of tourists rely on the information provided by an official web-site or the site of a destination service provider, while 35% of tourists rely on the information provided by websites collecting and presenting comments, reviews and ratings from travelers
Booking/ transaction behavior	• Italians are mostly independent travelers; only 18% of outbound trips are organized as package travel • Majority (90%), however, book transport and/or accommodation in advance - online commercial services are a dominant booking method (49%), with services listing private accommodation (i.e. Airbnb) (33%) more preferred at the moment than online travel agencies (i.e. booking.com) (22%) • As expected, older travelers (55+ years of age) are more reliant on booking over the counter of a travel agency (24%) and less reliant on booking via online commercial services (32%)
Planning/trip behavior	• Italians travel with a partner (29%), family (including children) (28%) or friends (22%), with younger travelers traveling more often with friends and older with a partner • Most outbound trips are from 4 to 7 days (38%), although outbound trips from 1 to 3 nights (28%) and 8 to 14 nights (26%) are also very popular

[9] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

	• Staying at relatives or friends is the preferred type of accommodation on 40% of outbound holiday trips, while 28% of trips include hotel accommodation and 24% other rented accommodation • Italians prefer air to land travel (64% use air transportation on outbound holiday trips); when using land transportation, they travel mostly by car (26%) • On average, 643 € is spent per outbound holiday trip, or about 86 € per day – 33% on accommodation, 34% on transport and 33% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Cities are popular type of destination among Italian travelers • A range of motives pull Italians towards a destination • Most of Italians travel on trips of up from 4 to 7 nights • Italians prefer flying to their destinations » *Promote geographical proximity of B&H on the Italian market* » *Tourism product development and promotion should be focused on 'city break holidays'* » *Develop products and experiences for short (two to three nights) and longer (up to two weeks) stay* » *Develop itineraries of various length to encourage exploration of regions, themed around cities, culture, lifestyle and nature* » *Work on improving and monitoring service quality, in particular in the natural and cultural locations/attractions, to stimulate repeat visits of tourists from this market as it is crucial in building destination loyalty* » *Improve the accessibility of a destination by means of air transport, the organization of traffic in a destination and the transport infrastructure*
Promotion	• Internet is an important source of information • Websites are the most important online information source for potential travelers • Large number of Italians holiday in Croatia » *Promotional activities should be dominantly pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. Airbnb, booking.com) – provide information and education on the presentation and positioning* » *Consider launching a promotional campaign during summer along the Croatian coast to capture this market*
By segments	• **Friends (18 to 29 years of age)**: not early planners; look for value for money and adventure; overwhelming majority look for information online and rarely use travel agencies » *Target young travelers with good value for money and adventure activities* » *Create 'city break' packages and packages that include visiting different cities, themed around culture and adventure* » *Promote last-minute deals* » *Improve/develop websites of destinations and service providers* » *Online commercial services should be available for booking* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking com) – provide information and education on the presentation and positioning*

- **Families (35 to 64 years of age)**: more frequent travelers; primarily interested in culture and gastronomy; majority look for information online, but every third also uses the services of a travel agency to organize holiday
    - » *Target older travelers with culture-based products and local gastronomy*
    - » *Create 'city break' packages and packages that include visiting different cities*
    - » *Improve/develop websites of destinations and service providers*
    - » *Offer various travel packages through travel agencies*

POLAND[10]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its sizeable travelling population and the fact that a large number of Polish holiday in neighboring Croatia • Most Polish travel to geographically close destinations in Germany, and to Mediterranean countries like Italy, Croatia, Greece and Spain, as well as UK • A majority (72%) travel at least once per year, realizing 11.3 million trips and 105.4 million overnights, of which 92% are private trips • About every third (36%) outbound traveler is between 45 and 64 years of age • Potentially important market for a range of B&H tourism products as they predominantly travel to cities (77%), but also to the seaside (29%) and mountain regions (10%) • Every fourth traveler is primarily motivated by sun & beach holiday or visiting family/friends/relatives (VFR), but important reasons for going on holiday are also enjoyment in nature (19%) and city trips (11%) • 45% of tourists are influenced by environmentally sustainable practices in a destination when making their holiday choices; 22% of tourists found the introduction of sustainable/environmentally friendly practices in the destination important • Nature (34%), general level of prices (12%), quality of accommodation (11%) and cultural and historical attractions (11%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (61%), followed by websites (47%); websites are much less important source of information for older tourists (55+ years of age) (27%)
Booking/ transaction behavior	• Polish are mostly independent travelers, although every fourth outbound trip is organized as package travel • Majority (83%), however, book transport and accommodation in advance - online commercial services are a dominant booking method (46%), where services listing private accommodation (i.e. Airbnb) (35%) are much more preferred at the moment than online travel agencies (i.e. booking.com) (19%) • As expected, older travelers (55+ years of age) are less reliant on online commercial services (23%)
Planning/trip behavior	• Polish travel with a partner (36%), family (including children) (32%) or friends (20%), with younger travelers more often alone/with friends and older with a partner • Most outbound trips are from 4 to 14 days (44% from 4 to 7 days and 28% from 8 to 14 days)

[10] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

	• Hotels are preferred type of accommodation on 46% of outbound holiday trips, while other rented accommodation is less popular (13%); 38% of trips include staying at relatives or friends • Air and land travel are both popular among Polish travelers (used on 48% and 50% of outbound holiday trips, respectively); when using land transportation, they travel mostly by car (33%), but bus is also a popular means of transportation used on 15% of outbound trips • On average, 494 € is spent per outbound holiday trip, or about 53 € per day – 27% on accommodation, 32% on transport and 41% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Cities are popular type of destination among Polish travelers • A range of motives pull Polish towards a destination • Most of Polish travel on trips of from 4 to 7 nights • Hotels are preferred type of accommodation, and high quality accommodation is an important factor of loyalty to a destination » *Offer good value for money and promote natural beauties to attract tourists from this market* » *Tourism product development and promotion should be focused on 'city break holidays', possibly with an excursion to natural attraction in vicinity* » *Develop tourism products based on a range of activities, themed around nature and sport-related activities, cities and culture* » *As Polish prefer longer stays, develop itineraries of various length and activities to encourage exploration of regions* » *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits of tourists from this market as it is important in building destination loyalty* » *Work on nature preservation and promotion as it is crucial in building destination loyalty* » *Improve the accessibility of a destination by means of air and road transport, the organization of traffic in a destination and the transport infrastructure, such as the accessibility of parking places, as all these are the important aspects of destination attractiveness/offer*
Promotion	• Internet is an important source of information • Websites are an important online information source for potential travelers • A large number of Polish holiday in Croatia » *Promotional activities should be dominantly pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning* » *Consider launching a promotional campaign during summer along the Croatian coast to capture this market*

By segments	• **Young friends/families**: visiting family/friends/relatives stands out as the main reason for going on holiday, followed by sun & beach, nature and city trips; the majority rely on recommendations of friends and relatives and websites for information search when making decisions about a holiday; nature is the most important factor in building destination loyalty; the majority use online commercial services to book holiday » *Target younger travelers with nature-based products* » *Monitor service quality in accommodation establishments* » *Improve/develop websites of destinations and service providers* » *Promotional activities should be also pursued through social media* » *Online commercial services should be available for booking* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking com) – provide information and education on the presentation and positioning* • **Older couples**: wellness/Spa/health treatment more important as the main reason for going on holiday; nature is the most important factor in building destination loyalty » *Target older travelers with nature-based products & wellness/spa/health treatment programs* » *Create packages that include visiting different destinations*

SLOVENIA[11]

Market overview	
Holiday/ destination choice	• Potentially one of the important source markets for B&H given its geographic proximity together with a preference for driving to a holiday destination • Most Slovenians on their outbound trips travel to geographically close destinations - primarily Croatia, followed by Italy and Austria • A huge majority (78%) travel at least once per year, realizing almost 2.9 million trips and 16.3 million overnights, of which 85% are private trips • Every third tourist is between 45 and 64 years of age • Potentially important market for a range of B&H tourism products as they travel primarily to seaside (68%), but also to cities (37%), and, to a lesser extent, countryside (12%) • Approximately half of travelers (52%) are primarily motivated by sun & beach holiday, but important reasons for going on holiday are also visiting family/friends/relatives (VFR) (13%) and to a lesser extent nature (7%), city trips (7%) and culture (6%); culture is much more important for younger travelers (up to 24 years of age) (18%) • Environmentally sustainable practices in a destination influence destination choice of every third traveler • Quality of accommodation (24%) and natural features (18%) are a paramount in building destination loyalty; quality of accommodation is more important to younger travelers, while older travelers place more importance on natural features • Personal experience (41%) and recommendations by friends or relatives (40%) are the most important information source, followed by websites (31%)
Booking/ transaction behavior	• Slovenians are mostly independent travelers; 90% of outbound trips are organized as non-package travel • Majority (85%) book transport and/or accommodation in advance - online commercial services are a dominant booking method (29%), followed by booking over the counter at a travel agency (20%) and booking over the phone (18%) • As expected, younger travelers (up to 39 years of age) are more reliant on online commercial services (44% as opposed to 20% of those older), but older travelers are more reliant on booking over-the-counter at a travel agency (33% of those older than 54 as opposed to 9% of those younger than 25)
Planning/trip behavior	• Slovenians travel with family (including children) (36%) or partner (32%); younger travelers more often travel with friends and older with a partner • Most outbound trips are up to seven days (44% up to three days and 34% from four to seven days)

[11] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

	• Rented accommodation other than hotels or similar establishments is the preferred type of accommodation on outbound holiday trips (26%), followed by hotels or similar accommodation (24%) and staying at relatives or friends (21%) • Slovenians prefer land to air travel (90% use land transportation on outbound holiday trips); they travel mostly by car (81%) • On average, 283 € is spent per outbound holiday trip, or about 46 € per day – 35% on accommodation, 28% on transport and 37% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Seaside and cities are popular type of destination among Slovenian travelers • A range of motives pull Slovenians towards a destination • Most of Slovenians travel on trips of up to 7 nights • High quality accommodation is an important factor of loyalty to a destination • Slovenians prefer driving to geographically close destinations » *Promote geographical proximity of B&H on the Slovenian market* » *Tourism product development and promotion should be focused on 'city break holidays'* » *Develop tourism products based on a range of activities, themed around cities, culture and nature* » *Develop products and experiences for short (two to three nights) and longer (up to a week) stay* » *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits of tourists from this market as it is crucial in building destination loyalty* » *Promote high quality accommodation* » *Improve the accessibility of a destination by means of road transport, the organization of traffic in a destination and the transport infrastructure, such as the accessibility of parking places, as all these are the important aspects of destination attractiveness/offer*
Promotion	• Personal experience and recommendations by friends or relatives are the most important sources of information • Large number of Slovenians holiday in Croatia » *Promotional activities should be pursued through the Internet utilizing a range of tools available to foster electronic word of mouth that has the largest influence on attracting new guests from this market* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Offer various travel packages through travel agencies* » *Consider launching a promotional campaign during summer along the Croatian coast to capture this market*
By segments	• **Young friends/families**: sun & beach stands out as the main reason for going on holiday, but culture is also important; the majority rely on recommendations of friends and relatives and websites for information search when making decisions about a holiday; the quality of accommodation is the most important factor in building destination loyalty; online commercial services are the most popular for booking a holiday » *Target young travelers with good value for money, high-quality accommodation and culture* » *Monitor service quality in the accommodation establishments* » *Improve/develop websites of destinations and service providers*

  - » *Social media should be heavily used for promotion*
  - » *Online commercial services should be available for booking*
- **Older couples**: wellness/spa/health treatment important reason for going on holiday; natural features and quality of accommodation are the most important factor in building destination loyalty; over the counter at a travel agency is the preferred booking method
  - » *Target older travelers with city trips, wellness/spa/health treatment programs and nature-based products*
  - » *Monitor service quality in accommodation establishments*
  - » *Offer various travel packages through travel agencies*

SPAIN[12]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its purchasing power and tourism demand trends • Most Spanish on their outbound trips travel to geographically close Mediterranean destinations in France, Portugal and Italy • A majority (68%) travel at least once per year, realizing 13.3 million trips and 113.1 million overnights, of which 88% are private trips • Every third tourist is between 45 and 64 years of age • Potentially important market for a range of B&H tourism products as they primarily travel to cities (81%), but often visit other destinations such as countryside (32%), seaside (28%) and mountains (21%) • Spanish travelers are primarily motivated by visiting family/friends/relatives (VFR) (27%), but important reasons for going on holiday are also sun & beach (24%), culture (16%), nature (10%) and city trips (10%) • Influence of environmentally sustainable practices in destination selection is significant – almost half of travelers are influenced by environmentally friendly practices (in transport, accommodation, destination, service providers) • Nature (23%), quality of accommodation (19%) and cultural and historical attractions (14%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (56%), followed by websites (45%)
Booking/ transaction behavior	• Spanish are mostly independent travelers; only 14% of outbound trips organized as travel package • Majority (87%), however, book transport and accommodation in advance – every second traveler uses online commercial services to book holiday, where online travel agencies (i.e. booking.com) (31%) are more preferred at the moment than services listing private accommodation (i.e. Airbnb) (24%) • As expected, older travelers (55+ years of age) are more reliant on booking over-the-counter at a travel agency (37% as opposed to 10% of those younger than 25 years of age)
Planning/trip behavior	• Spanish travel with a partner (36%) or family (including children) (34%) • Most outbound trips are up to 7 days (29% up to 3 days and 37% from 4 to 7 days) • Hotels are preferred type of accommodation (48%), followed by staying at relatives or friends (29%) • Spanish prefer air to land travel (65% use air transportation on outbound holiday trips and 32% land transportation) • On average, 857 € is spent per outbound holiday trip, or about 96 € per day – 27% on accommodation, 36% on transport and 36% on other services (restaurants, attractions, excursions, shopping)

[12] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

Recommendations	
Destination product development	• Cities are popular type of destination among Spanish travelers, but also countryside and mountains • A range of motives pull Spanish towards a destination • Most of Spanish travel on trips of up to 7 nights • Hotels are the most popular type of accommodation, while high quality accommodation is an important factor of loyalty to a destination » *Tourism product development and promotion should be focused on 'city break holidays', possibly with an excursion to natural attractions* » *Develop tourism products based on a range of activities, themed around cities, culture (historical heritage, museums, tours) and nature* » *Identify environmentally friendly practices and stress it in products offered* » *Develop products and experiences for short (two to three nights) and longer (up to a week) stay* » *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits of tourists from this market as it is important in building destination loyalty* » *Promote high quality accommodation* » *Improve the accessibility of a destination by means of air transport and the transport infrastructure*
Promotion	• Internet is an important source of information » *Promotional activities should be pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning* » *Online commercial services should be available for booking*
By segments	• **Friends (18 to 29 years of age)**: love music, partying and fashion; cities and beaches are most popular destinations; late bookers; majority searches for information online; usually buy tickets online » *Develop tourism products themed around cities, music events and lifestyle* » *Create packages that include visiting different cities* » *Promote last minute deals* » *Promotion should be pursued online* » *Online commercial services should be available for booking* • **Young couples with children (30 to 59 years of age)**: enjoy other cultures and gastronomy; cities and beaches are most popular destinations; majority searches for information online » *Develop tourism products that promote local culture and gastronomy* » *Create packages that include visiting different cities* » *Also add children and family friendly attractions and activities/services* • **Couples (40 to 54 years of age)**: like to travel to different places, enjoy other cultures and gastronomy » *Develop holidays that combine enjoyment in authentic culture, gastronomy and visiting different cities* • **Older couples (50 to 64 years of age)**: magazines are an important source of information, but also search for information online » *Create packages that include city trips, themed around culture and gastronomy*

» *Traditional methods of promotion should be focused to target older travelers – guidebooks and magazines, travel agencies and newspapers/radio/TV Offer various travel packages through travel agencies*

SWEDEN[13]

Market overview	
Holiday/ destination choice	• Potentially an important source market for B&H given its tourism demand trends and good purchasing power • The most popular outbound destinations for Swedish travelers are Spain, Finland, Denmark, Germany and United Kingdom • A huge majority (87%) travel at least once per year, realizing 8.9 million trips and 70.8 million overnights, of which 89% are private trips • Every second tourist is older than 44 years of age • Potentially important market for a range of B&H tourism products as they travel to countryside (24%), cities (20%) and seaside (19%) • Every fourth traveler is primarily motivated by visiting family/friends/relatives (VFR), but important reasons for going on holiday are also sun/beach (23%) and wellness/spa/health treatment (17%); travelers younger than 25 years of age are more often primarily motivated by specific events (e.g. sport events, festivals) than by culture compared to older travelers • Influence of environmentally sustainable practices in destination selection is significant – every third traveler is influenced by environmentally friendly practices (in transport, accommodation, destination, service providers • Nature (19%), cultural and historical attractions (16%) and quality of accommodation (11%) are a paramount in building destination loyalty • Recommendations by friends or relatives are the most important information source (53%), followed by personal experience (46%) and websites (37%)
Booking/ transaction behavior	• Swedish are mostly independent travelers; however, a relatively large proportion (29%) purchases a travel package • Majority (86%) book transport and accommodation in advance - online commercial services are a dominant booking method (59%), where online travel agencies (i.e. booking.com) are much more preferred at the moment than services listing private accommodation (i.e. Airbnb) • As expected, online commercial services are used less often by older tourists, who more frequently book over the counter at a travel agency
Planning/trip behavior	• Most outbound trips are usually planned at least three months in advance • Swedish travel with family (including children) (41%) or a partner (28%), with older travelers more often traveling with a partner • Most outbound holiday trips are up to seven days (35% up to three and 38% from four to seven days) • Hotel is the preferred type of accommodation, used on 59% of outbound holiday trips • Swedish prefer air to land travel (56% use air transportation on outbound holiday trips); every fifth uses motor vehicle

[13] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

	• On average, 509 € is spent per outbound holiday trip, or about 62 € per day – 37% on accommodation, 28% on transport and 35% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Countryside and cities are popular destinations for Swedish travelers • A range of motives pull Swedish towards a destination • Most outbound trips are up to 7 nights • Hotels are the preferred type of accommodation, while high quality accommodation is an important factor of loyalty to a destination • Swedish prefer flying to destinations » *Tourism product development and promotion should be focused on 'countryside' and 'city break holidays'* » *As B&H is the new destination for Swedish travelers, develop itineraries to encourage exploration of regions, themed around wellness/spa/health treatment, culture and nature* » *Develop products and experiences for short (two to three nights) and longer (up to a week) stay* » *Work on improving and monitoring service quality, in particular in the accommodation establishments* » *Promote high quality accommodation* » *Promote packages with discount prices or some other benefits for early bookers who make reservations at least 3 months in advance* » *Improve the accessibility of a destination by means of air transport and the transport infrastructure*
Promotion	• Internet is an important source of information for potential travelers » *Promotional activities should be dominantly pursued through the Internet, but traditional promotional tools should not be overlooked* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning*
By segments	• **Young friends/families**: specific events, such as sport events and festivals, are an important reason for going on holiday; the majority rely on recommendations from friends and relatives for information, followed by websites; cultural and historical attractions are the most important factor in building destination loyalty; the majority use online commercial services to book holiday » *Target young travelers with specific events and good value for money* » *Create 'city break' packages* » *Improve/develop websites of destinations and service providers* » *Online commercial services should be available for booking* • **Older couples**: culture and nature are more important reasons for going on holiday; online commercial services are a dominant method to book holiday » *Target older travelers with wellness/spa/health products, nature and culture* » *Create packages that include visiting countryside and packages themed around cultural and historical attractions* » *Online commercial services should be available for booking*

SWITZERLAND[14]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its sizeable purchasing power, geographic proximity together with a preference for driving to a holiday destination • Most Swiss on their outbound trips travel to geographically close destinations in Germany, Italy and France • Swiss travelers realized 13.6 million trips and 110.2 million overnights in 2015, of which 94% are private trips • Majority of tourists (53%) are over 44 years of age • Potentially important market for a range of B&H tourism products as they travel to cities (22%), seaside (21%) and countryside (18%)
Booking/ transaction behavior	• Swiss are mostly independent travelers; only 12% of outbound holiday trips are organized as package travel • Internet is the most popular booking method for accommodation (46%) and transport (37%)
Planning/trip behavior	• Two out of three outbound holiday trips are up to seven days (34% up to three and 32% from four to seven) • Hotel is the preferred type of accommodation used on every second outbound holiday trip, followed by relatives or friends (30%) • Swiss travelers prefer land to air travel (60% use land transportation on outbound holiday trips); motor vehicle is preferred mode of transport (46%), while 39% travel by plane • On average, 950 € is spent per outbound holiday trip, or about 114 € per day – 35% on accommodation, 32% on transport and 33% on other services (restaurants, attractions, excursions, shopping)
Recommendations	
Destination product development	• Seaside, countryside and cities are popular type of destinations among Swiss travelers • Most outbound trips last up to 7 nights • Hotels are the preferred type of accommodation • Swiss prefer driving to geographically close destinations » *Promote geographical proximity of B&H on the Swiss market* » *Tourism product development and promotion should be focused on 'city breaks' and visiting countryside* » *As B&H is the new destination for Swiss, develop itineraries of various length and activities to encourage exploration of regions* » *Develop products and experiences for short (two to three nights) and longer (up to a week) stay* » *Work on improving and monitoring service quality, in particular in the accommodation establishments* » *Promote high quality accommodation*

[14] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets].

	» *Improve the accessibility of a destination by means of road transport, the organization of traffic in a destination and the transport infrastructure, such as the accessibility of parking places, as all these are the important aspects of destination attractiveness/offer*
Promotion	• Internet is important for booking » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning*

TURKEY[15]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its sizeable travelling population and cultural similarity • Most Turks on their outbound trips travel to geographically close destinations in Georgia, Greece and Bulgaria • Every second Turk travels at least once per year, realizing 8.9 million trips and 87.7 million overnights • Visiting family/friends/relatives (VFR) (28%) and sun/beach (27%) are the main reasons for going on holiday; the importance of wellness/spa/health treatment is increasing, while the importance of sun & sea is decreasing with age • Influence of environmentally sustainable practices in destination selection is significant – 82% of travelers are influenced by environmentally friendly practices (in transport, accommodation, destination, service providers) • Nature (23%), quality of accommodation (20%), prices (16%) and culture (12%) are important in building destination loyalty • Recommendations by friends or relatives are the most important information source (52%), followed by websites (32%); every fifth traveler also uses social media
Booking/ transaction behavior	• Tourist services are usually purchased separately (38%), while 35% of Turks usually went on an all-inclusive holiday • Majority (70%) book transport and/or accommodation in advance - online commercial services are the most popular booking method (27%), where online travel agencies (i.e. booking.com) are much more preferred at the moment than services listing private accommodation (i.e. Airbnb) • Online commercial services are more popular among tourists aged 35-39 (37%) compared to other age groups
Planning/trip behavior	• Turks travel with a family (including children) (25%), friends (24%) or a partner (21%), with younger travelers more often with friends and older with a partner • Paid commercial accommodation (e.g. hotel, hostel) is the preferred type of accommodation (48%), followed by staying at relatives or friends (26%) • Expenditure on package tours account for 20% of total tourism expenditure • Food &beverage and accommodation are the main expenditure categories for outbound Turkish travelers • Residents of Turkey on average spent 578$/capita when traveling abroad
Recommendations	
Destination product development	• A range of motives pull Turks towards a destination • Hotels are the preferred type of accommodation, while high quality accommodation is an important factor of loyalty to a destination » *Promote gastronomic offer* » *Identify environmentally friendly practices and stress it in products offered* » *Develop itineraries of various length to encourage exploration of regions*

[15] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; TurkStat – Arriving Citizens Survey.

	» *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits of tourists from this market as it is crucial in building destination loyalty* » *Promote high quality accommodation*
Promotion	• Internet is an important source of information » *Websites and social media pages should be used for promotion* » *Online commercial services should be available for booking* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning* » *Build a story line on culturally similar yet different; draw on history to develop key story lines and appeal to nostalgia*
By segments	• **Young friends/families**: city breaks and culture somewhat more important reasons for going on holiday; paid private accommodation (e.g. rented apartment) more popular than paid commercial accommodation (e.g. hotel, hostel) » *Tourism product development and promotion should be focused on 'city break holidays' themed around culture (historical heritage, museums, tours)* » *Promote paid private accommodation (e.g. rented apartment)* » *Online commercial services should be available for booking* • **Older couples**: natural features and wellness/spa/health treatment more important reasons for going on holiday » *Target older travelers with nature-based products and wellness/spa/health treatment*

UNITED KINGDOM[16]

Market overview	
Holiday/ destination choice	• Potentially important source market for B&H given its sizeable travelling population and purchasing power • Most British people on their outbound trips travel to Mediterranean destinations in Spain, France and Italy • Majority (73%) travel at least once per year, realizing 52.3 million trips and 563.9 million overnights, of which 89% are private trips • Every second tourist is between 35 and 64 years of age • Potentially important market for a range of B&H tourism products as they travel to cities (67%), seaside (46%), countryside (26%) and mountains (13%) • Sun & beach holiday and visiting family/friends/relatives (VFR) (both 27%) are the main reasons for going on holiday • Influence of environmentally sustainable practices in destination selection is significant – almost half of travelers are influenced by environmentally friendly practices (in transport, accommodation, destination, service providers) • Nature (20%), quality of accommodation (18%), cultural and historical attractions (16%) and activities/services available (13%) are important factors in building destination loyalty • Recommendations by friends or relatives are the most important information source (61%), followed by websites (51%) and personal experience (39%); recommendations by friends or relatives and websites with comments, reviews and ratings from travellers are more important for younger tourists
Booking/ transaction behavior	• Tourist services are most often purchased separately (51%), while every fifth traveler usually books an all-inclusive package travel • Majority (95%) book transport and/or accommodation in advance - online commercial services are a dominant booking method (61%), where online travel agencies (i.e. booking.com) are much more preferred at the moment than services listing private accommodation (i.e. Airbnb)
Planning/trip behavior	• They most often travel with a partner (37%) or with a family (including children) (31%), with older travelers more often traveling with a partner • Most outbound trips are from 4 to 14 days (39% from 4 to 7 nights and 28% from 8 to 14 nights) • Hotel is the preferred type of accommodation (61%), followed by staying at relatives or friends (26%) • British outbound travelers prefer air to land travel (84% use air transportation on outbound holiday trips) • On average, 712 € is spent per outbound holiday trip, or about 63 € per day – 51% on accommodation, 38% on transport and 11% on other services (restaurants, attractions, excursions, shopping)

[16] European Commission (2016). Preferences of Europeans towards Tourism. Flash Eurobarometer 432 Report; Eurostat – Tourism Data Base; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; Institute for tourism (2018). Survey on attitudes and expenditures of tourists in Croatia in summer 2017 - TOMAS Summer 2017.

Recommendations	
Destination product development	• The majority of British outbound travelers travel to cities, but they also often visit countryside • Most of British people travel on trips from 4 to 14 nights • Hotels are the preferred type of accommodation, while high quality accommodation is an important factor of loyalty to a destination • British prefer traveling to Mediterranean destinations » *Promote geographical location of B&H on the British market* » *Tourism product development and promotion should be focused on city trips, possibly with excursions to natural attractions* » *Create packages that include visiting different cities* » *Develop tourism products based on a range of activities, themed around nature, lifestyle and culture* » *Identify environmentally friendly practices and stress it in products offered* » *Develop products and experiences for longer stay* » *Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits of tourists from this market as it is important in building destination loyalty* » *Online commercial services should be available for booking* » *Promote high quality accommodation* » *Improve the accessibility of a destination by means of air transport*
Promotion	• Internet is an important source of information • Websites are important online information source for potential travelers » *Promotional activities should be pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) which are usually used to book holiday – provide information and education on the presentation and positioning*
By segments	• **Young friends/families**: visiting family/friends relatives stands out as the main reason for going on holiday; the majority rely on recommendations of friends, colleagues or relatives for information search when making decisions about a holiday, but websites and social media pages are very important; natural features, the activities/services available and cultural and historical attractions are the most important factors in building destination loyalty; the majority use online commercial services to book holiday » *Target young travelers with good value for money and products based on a range of activities, themed around cities, nature and culture* » *Promotional activities should be pursued through social media pages* • **Older couples**: visiting family/friends/relatives and sun & beach stand out as the main reason for going on holiday; the majority rely on recommendations of friends, colleagues or relatives when making decisions about a holiday; the natural features and the quality of accommodation are the most important factors in building destination loyalty; the majority use online commercial services to book holiday » *Target older travelers with nature-based products and culture* » *Offer various travel packages through travel agencies* » *Monitor service quality in accommodation establishments*

CHINA[17]

Market overview	
Holiday/ destination choice	• Potentially one of the important source markets for B&H since China is the world's top spender in international tourism and the world's fastest growing outbound market • 135 million Chinese traveled abroad in 2016 (two thirds are millennials) • Top destinations for Chinese travelers are Asia-Pacific region (63%) and Europe (26%) • France (24%) and Italy (23%) are the most popular destinations in Europe, followed by Germany (16%) • Chinese travelers aged 35 to 60 years are a dominant group in outbound travel to Europe • They usually travel to major cities (85%) • Cultural and historical heritage is the main reason for going on holiday; Chinese travelers love sightseeing (73%), but also gastronomy (64%) and shopping (56%); those older than 34 years of age are more interested in sightseeing, going on organized tours and visiting museums and galleries, while younger travelers are more interested in gastronomy, shopping and concerts • Chinese outbound travelers prefer nature (87%), historical sites (74%), art gallery/museums (55%) and theme parks (50%) • The main concerns for Chinese outbound travelers are language barriers (74%), safety (41%) and cultural differences (40%), but service/product quality (29%), availability of information (22%) and medical help (21%) are also important • Internet (68%) is the most important source of information when planning travel • Destination marketing relies on localized social media platforms instead of Facebook or Instagram
Booking/ transaction behavior	• Organized multi-destination package tours are popular type of holiday • Offline services are the most popular booking method; every fifth traveler books online
Planning/trip behavior	• Most outbound trips are from three to eight days (37% from three to five days and 44% from six to eight days) • Hotel is the preferred type of accommodation (78%); safety and comfort are the main aspects Chinese travelers look for • On average, the largest are shopping expenditures (58%), followed by lodging (18%) and transport (11%); when traveling to Europe they spend on lodging, tickets, luxury goods and souvenirs

[17] Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf; https://www.travelchinaguide.com/tourism/2017statistics ; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]. For more information visit online toolkit providing knowledge, sharing information and flagging events linked to the “2018 EU-China Tourism Year”, https://ecty2018.org/.

Recommendations	
Destination product development	• Cities are popular type of destination among Chinese travelers • Hotels are the preferred type of accommodation • Destination uniqueness, China friendly services and gastronomy, good value for money and time, and no safety concerns pull them towards a destination • They are interested in culture, clean and peaceful cities, beautiful landscape, gastronomy, convenient public transport, and they appreciate friendliness of local residents • They do not like high prices, lack of information in Chinese language, Chinese debit cards not being accepted, needing to pay for the use of toilets, long queues at tourist attractions and early closing hours of local shops » *Top 8 tips to win the Chinese:* » *1. Make your services „China friendly“* » *2. Storify your services* » *3. Provide WiFi* » *4. Set the stage for interaction* » *5. Let them shop* » *6. Emphasize the value of your services (use phrases that* » *attract Chinese)* » *7. Accept Chinese travelers with open arms* » *8. Learn a few useful Mandarin Chinese phrases* » *Tourism product development should be focused on tailor-made travel packages themed around culture, celebrities, cities and gastronomy* » *Travel packages should include exploration of different cities/regions* » *Offer organized trips with tour guides who can speak Chinese* » *Destination service providers should be more flexible in payment methods, so that Chinese debit cards are accepted* » *Make visa policies easier* » *Arrange charter flights* » *Work on improving and monitoring service quality, in particular in the accommodation establishments* » *Improve the accessibility of a destination by means of air transport, the organization of traffic in a destination and the transport infrastructure* » *Forge B2B activities with main tour operators in the region to encourage them to include B&H in their itineraries*
Promotion	• Internet is an important source of information » *Promotional activities should be dominantly pursued through the Internet; use websites and social media for promotion* » *Promote cultural and historical attractions in cities, celebrities, good value for money, gastronomy and local friendliness* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure; official websites in Chinese language are a great asset* » *Assist service providers in utilizing advantages of on-line travel agencies (e.g. tianxun.com, youzhan.com) – provide education on the presentation and positioning* » *Travel agencies are an important source of information for Chinese travelers*

By segments	• **Traditionalists (70%)**: prefer to join tour groups and travel because of the prestige it brings » *Target traditionalists with high quality accommodation, visiting museums and galleries and tailor-made programs (e.g. organized tours)* • **Wenyi (cultured) youth (10%)**: backpackers » *Target backpackers with good value for money* • **Experience centered (10%)**: want to satisfy their curiosity » *Packages should include exploration of different cities/regions* • **Connoisseurs (7%)**: learn new things and get aesthetic experiences together with family members » *Target them with natural beauties and culture* • **Hedonists (3%)**: travel with friends for pleasure and shopping » *Target hedonists with city trips themed around shopping and gastronomy*

MIDDLE EAST[18]

Market overview	
Holiday/ destination choice	• Potentially an important source market for B&H given its cultural similarity and purchasing power • Most Middle Eastern travelers on their outbound trips in Europe travel to United Kingdom, Germany, Switzerland, Italy and Austria • Every second outbound travel is primarily motivated by leisure, followed by business (25%) and visiting family/friends/relatives (VFR) (20%) • The main reasons for going on holiday in Europe are escape from the hot weather, natural scenic beauty, good weather, towns and cities, prestige, culture, history and sightseeing attractions and shopping • Middle East travelers prefer holidays that include visiting cities, sightseeing, beaches, shopping, visiting theme parks and/or touring • Relaxing, shopping and visiting restaurants are amongst the most popular activities • Travelers from Middle East are usually well-educated and relatively young with high income • Main barriers for going on a holiday in Europe are costs, need for a visa, food concerns, language barriers, safety and cultural dissimilarity • Recommendations by friends and family are the most important information source (71%), followed by travel agencies and increasingly popular websites • Important online travel resources are booking.com, cleartrip.com, expedia.com, hotels.com, wego.com, tajawal, etc. • Other sources of online information gathering are travel blogs, social media websites, travel review websites such as Trip Advisor, independent travel advice websites such as Lonely Planet and National Tourist Board websites
Booking/ transaction behavior	• Middle East is a late booking market; many travelers book their summer holiday less than two weeks before travelling • Travel agencies are the main booking channel • Direct methods of booking with service providers are gaining popularity
Planning/trip behavior	• Family members are dominant travel companions • Most outbound trips to Europe last from 3 to 19 nights • Average length of outbound trips is 13 (for GCC travelers) or 14 nights (for UAE travelers) • Five/four-star hotels and apartments/villas are the preferred type of accommodation • They are high spenders; on average, 2.800 € is spent per person per outbound holiday trip, or about 200 € per person per night (applicable for UAE travelers)

[18] With special emphasis on Kuwait, Saudi Arabia and UAE; UNWTO (2012). The Middle East Outbound Travel Market with Special Insight into the Image of Europe as a Destination; IPK International (2014). World Travel Monitor; Market Vision (2012). The Middle East Outbound Travel Market; Tourism Ireland (2016). GCC Market Snapshot; Observatoire Valaisan du Tourisme (2014). The Gulf Cooperation Council (GCC) Source Market Report; World Tourism Organization and European Travel Commission (2018). The Gulf Cooperation Council (GCC) Outbound Travel Market with Special Focus on Europe as a Tourism Destination.

	Recommendations

Destination product development	• Cities are popular type of destination among Middle East travelers
	• A range of motives pull them towards a destination
	• Middle East travelers tend to go on long outbound trips
	• High quality accommodation is preferred
	» *Promote cultural similarities of B&H on the Middle East market*
	» *Tourism product development and promotion should be focused on city trips with an emphasis on prestige, sightseeing, gastronomy and shopping*
	» *Develop itineraries of various length to encourage exploration of regions*
	» *Create programs for families with children*
	» *Develop all-inclusive offer*
	» *Work on improving and monitoring service quality, in particular in the accommodation establishments*
	» *Promote high quality accommodation*
	» *Provide basic cultural requirements*
	» *Provide help with acquiring a tourist visa*
	» *Tips for doing business with tour operators*
	  » *Introduce new products*
	  » *Bundle secondary destinations together*
	  » *Educate agents*
	» *Tips for doing business for hotels*
	  » *Work closely with travel agencies rather than trying to sell directly*
	  » *Focus on all-inclusive offer*
	  » *Provide basic cultural requirements*
	  » *Assure privacy*
	  » *Offer halal food and a wide selection of soft drinks*
	  » *Create programs for family activities, promote offer for children*

Promotion	• Travel agencies are an important source of information and a dominant booking channel (e.g. myTravelChannel.com, OctopusTravel.com, Hotels.com) • Top five media channels for travel trade/consumers in English are: Travel Trade Weekly, Travel and Tourism News Middle East, Condé Nast Traveller Middle East, Travel Trade Gazette MENA, Travel and Tour World; and in Arabic: Ara Magazine, Zahrat Al Khaleej, Travel Arabia, Laha Magazine, Shabab 20 » *Promotional activities should be dominantly pursued through travel agencies* » *Also promote B&H via the most popular media channels for travel/consumers* » *Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays*
By segments	• Families • VFR • Couples • Youth (single travelers or group of friends) • Honeymooners

SOUTH KOREA[19]

Market overview	
Holiday/ destination choice	• Potentially an important source market for B&H given it is one of the top outbound markets in the world and its strong purchasing power • Most South Korean citizens on their outbound trips travel to geographically close destinations in China and Japan • Top European destinations for South Korean tourists are France, Germany, Spain, Austria, Czech Republic, Switzerland, Turkey, UK, Italy, Hungary, Russia and Croatia • The most important factors in destination choice are safety, value for money, suitability for family holiday, attractiveness of destination, natural beauties and gastronomic offer • South Korean citizens realized over 22 million outbound trips in 2016 • More than a half of South Korean citizens (57%) travel for leisure, followed by professional/business motives (25%) and education (12%) • The majority of tourists (55%) are between 31 and 60 years of age
Booking/ transaction behavior	• 30% of outbound trips are organized as package tours • 42% of trips to Europe are booked online • The largest online travel agencies in South Korea are Hanna Tour, Interpark Tour, Mode Tour, Onlinetour.co.kr, YB Tour, KRT Tour, Very Good Tour and Webtour.com • On average, 3.625$ is spent per outbound holiday trip to Europe
Planning/trip behavior	• Round trips are dominant type of outbound trips to Europe (70%), followed by city breaks (15%) and visiting resorts (10%); when traveling to Croatia, organized travel is dominant (74%) and they usually stay in hotels (77%)
Recommendations	
Destination product development	• Round trips are dominant type of outbound trips • A range of motives pull South Koreans towards a destination » *Tourism product development and promotion should be focused on organized multi-country round trips themed around family holiday, nature, gastronomy* » *Provide safety and good value for money* » *Develop itineraries of various length to encourage exploration of regions* » *Work on improving and monitoring service quality, in particular in the accommodation establishments - promote high quality accommodation* » *Improve the accessibility of a destination by means of air transport*

[19] Korea Tourism Organisation; STB Market Insights Report; Croatian Tourism Board (2016). Ključne odlike turističkog prometa na značajnijim emitivnim tržištima [Key features of tourist demand on major markets]; IPK International (2014). World Travel Monitor.

Promotion	• Internet is an important booking method for outbound trips to Europe » *Promotional activities should be pursued through the Internet* » *Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure* » *Assist service providers in utilizing advantages of on-line travel agencies (e.g. Hanna Tour, Interpark Tour) – provide information and education on the presentation and positioning* » *Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays* » *Devise marketing strategies for joint product development and cross-marketing* » *Consider launching a promotional campaign during summer along the Croatian coast to capture this market*

UNITED STATES OF AMERICA[20]

Market overview	
Holiday/ destination choice	• Potentially one of the most important source markets for B&H given its sizeable travelling population, high growth in Croatian tourism demand and good purchasing power • Americans most often travel to Mexico and Canada, while United Kingdom is the third most popular outbound destination • The majority of tourists (68%) are between 31 and 64 years of age • Vacation/holiday is the main trip purpose for the majority of travelers (55%), followed by visiting family/friends/relatives (VFR) (27%) • Main activities on outbound trips are sightseeing (78%) and shopping (76%), followed by visiting small town/countryside (43%), restaurants (41%) and historical locations (40%); they also often go on guided tours (35%) and visit art galleries/museums (33%), cultural heritage sites (31%) and national parks (28%) • Authenticity and rest/relaxation are the main experiences they seek while travel • Value for money, once-in-a-lifetime experience and activities available are amongst the most important factors in choosing a destination • Airlines are the most important information source (53%), followed by online travel agencies (33%) and personal recommendations (22%)
Booking/ transaction behavior	• Every second tourist travels independently • Booking directly through airlines (40%) and internet booking services (33%) are the most popular booking methods • The largest online travel agencies/portals are Expedia, Orbitz, The Priceline Group, Travelocity, Cheapoair, TripAdvisor, Hotels.com, Booking.com and Airbnb
Planning/trip behavior	• USA tourists mainly travel alone (62%); usually visit only one destination (57%) • On average, 1.464 $ is spent per person per outbound trip, or about 85 $ per person per day
Recommendations	
Destination product development	• Americans enjoy sightseeing and shopping, and search for authentic experiences and relaxation » *Develop packages and products with an emphasis on authentic experience, themed around cities, sightseeing, shopping and gastronomy* » *Offer excursions to cultural attractions and nature parks* » *Offer good value for money* » *Various activities should be available in a destination* » *Improve the accessibility of a destination by means of air transport*

[20] United States National Travel & Tourism Office (NTTO); Marketing Strategies For Tourism Destinations A Competitive Analysis Target Market – USA, Tourism Development International, A report produced for European Travel Commission (ETC) by Tourism Development International, 2014.

Promotion	• Airlines are the most important source of information, but online travel agencies are also popular » *Promotional activities should be dominantly pursued through airlines and online travel agencies* » *All promotional channels and tools should give complete and detailed information on a destination*
By segments	• **Young friends/families**: » *Target them with good prices and value for money of accommodation* » *Online commercial services should be available for booking* • **Older couples**: » *Create packages that include visiting different cities* » *Offer various travel packages through travel agencies*

5. GENERAL RECOMMENDATIONS AND FUTURE STEPS

Based on the insights from the trip decision making process by main B&H incoming markets, as well as having in mind the main scope of this study, the most important recommendations could be derived in the following areas:

1. General recommendations
2. Recommendations regarding the product development activities and promotion
3. Recommendation regarding future research plan.

5.1. General recommendations

- Conduct a primary research on the main generation markets on an image of B&H and main travel preferences of the specific market (see section 5.3)
- Based on the research results, plan a mass media campaign (TV, radio, magazines, social media etc.) in order to emphasize positive image features and specific country attributes that appeal to the target markets
- Create a system of regular B&H visitor surveys - surveys on profile, activities, satisfaction and expenditures of tourist during their stay in B&H (see primary research plan, section 5.4)
- Analyze eWOM data, social networks data, blogs data – a tremendous amount of information readily available (see section 5.3)
- Analyze websites of all major suppliers of tourist products in B&H in order to improve them according to the consumer preferences (i.e. emphasize security, nature etc.)
- Analyze written promotional material in order to find out if they are created in accordance to consumer needs (information they are asking for, photos, stories etc.) and destination attributes
- Categorize the B&H tourist attraction base, i.e. systemize and categorize all major tourist attractions, including the assessment of their accessibility and attractiveness, available information and promotion from the perspective of the main tourist segments (rely on book by Eduard Kušen, 2002, TURISTIČKA ATRAKCIJSKA OSNOVA [Tourist attraction base]) [21]
- Cooperation of main tourism stakeholders (tourism promotion, DMO, accommodation establishments, tourism attractions, intermediaries – travel agencies, local governments and others) is essential for country in order to be successful in tourism product marketing process.

[21] Eduard Kušen, a research associate of the Institute for Tourism, had been engaged in researching tourist attractions for many years. In this book, he intends to get acquainted with the basic knowledge of being tourist attractions, their functional classification, conducting appropriate documentation, planning their use in the sustainable development manner. The book combines textbook and manual features, giving the insight into the phenomenology of tourist attractions, and helping practitioners to help them evaluate and classify them.

5.2. Recommendations regarding the product development activities/phases

Product development activities/phases	Recommendations
PRODUCT/SERVICE DEVELOPMENT	• Take into account that many destination attributes are important for potential tourists – from destination brand reputation to tourism attractions, infrastructure and services • Tourism product development and promotion should be focused on 'city break holidays', themed around culture (historical heritage, museums, tours), lifestyle and nature • Work on improving and monitoring service quality, in particular in the accommodation establishments, to stimulate repeat visits as it is important in building destination loyalty • Every destination should make a list of all strengths and weaknesses of its product(s) to be able to create efficient development plan • Market trends suggest that relaxation & health features are becoming more and more important together with shopping, cultural and entertainment events, gastronomy (food and wine) • Because tourists are becoming more and more active, destinations should develop and offer many activity choices for all the demographic and psychographic market segments • Majority of tourists are influenced by environmental friendly practices of destinations - those practices should be developed • Stick to authentic destination characteristics in order to create an authentic experience • Monitor quality of accommodation and promote high quality accommodation
PROMOTIONAL ACTIVITIES AND TOOLS	• Internet is becoming number one source of information and websites should have all necessary information for potential travelers – information have to be timely and relevant, objective and trustworthy • Majority of tourists that use Internet are also informed through social media and all tourism public authorities and suppliers should develop their information according to social media characteristics (objective reviews are becoming more relevant) • Other media are still important – TV, radio and printed materials, as potential tourists are using more than one source of information – these media should have a special emphasis on a specific feature or offer, and provide more detailed information than Internet • Improve/develop websites of destinations and service providers, and ensure that they are mutually linked to improve reach and exposure • Assist service providers in utilizing advantages of on-line travel agencies (i.e. booking.com) – provide information and education on the presentation and positioning • Identify travel agencies / wholesale tour operators selling regional tourism products (Croatia, East Balkans) and facilitate B2B workshops to improve the sale of packaged holidays for the

	older segments of travelers preferring over-the counter travel agencies and package travel • Devise marketing strategies for joint product development and cross-marketing • Consider launching a promotional campaign during summer along the Croatian coast to capture European markets
BOOKING AND DISTRIBUTION	• Online commercial services have to be developed as they are the most popular among the tourists • Package travels are more important for specific travel markets

5.3. Recommendations regarding future research plan

Qualitative research on B&H image of travel trade via in-depth interviews with tour operators/independent travel agencies and travel writers

Aims	To get to know the current image of B&H as a tourism destination of travel trade on the inbound markets and to examine how this can be used to develop the marketing of B&H as a destination
Population	Outbound tour operators/independent travel agencies (both doing B&H and not doing B&H yet) on the inbound markets and travel writers of newspapers/magazines/travel blogs on the inbound markets
Sample	5 to 7 major travel agencies per inbound market plus 3 to 4 well established newspapers/magazines/travel blogs specialized for travel per inbound market
Data collection	Face to face interviews/skype interviews with general managers and/or product managers Interview guide, separately for travel agencies and travel writes Length of interview: 45 to 60 minutes Interview transcripts
Topics	Interview broadly covered: • overall business environment and market trends • knowledge, experience and perceptions of B&H and major attractions (e.g. Sarajevo) as a tourism destination • assessment of the current and expected demand for travel to B&H, market profile (who is travelling, travel preferences) including possible barriers to travel • identification of the most popular B&H tourism regions/products • structure and pricing of the packages • market outlook • experience of doing business with B&H (trade support, on-ground operators, attractions, quality of accommodation, value for money) • what needs to be done to help them selling B&H better.
Data analysis	Interview’s transcripts Analysis by the themes and topics specified above

Qualitative research on B&H image of general population (focus groups)

Aims	The principal objectives of this primary research is to gain deeper insight into: • Perception of B&H among potential tourists from key generating markets • Holiday planning and trip decision making processes regarding trips to B&H among outbound travelers at key generating markets
Population	For the purpose of this research, population is defined as citizens who have travel out of their own country within last year (outbound trips)
Sample	2 focus groups (8 to 10 participants per group) per generating/inbound market
Data collection	Focus groups conducted in capital cities, structured so to include travelers and non-travelers to B&H (where possible) and different age groups and family life-cycle segments
Topics	This research covers: • attitudes to international leisure travel in general, wishes and preferences in relation to international travel and the role of value messages in decision making process • image of B&H as a tourism destination in relation to competitors, main tourism products, factors driving decision to (re)visit B&H, barriers to travel to B&H • experience in visiting B&H, especially in relation to expectations, factors influencing repeat visit • travel planning – information needs, booking process, on-line booking.
Data analysis	By each country and by main sociodemographic segments

Social media - user generated content analysis

Justification	Social media - user generated content (UGC) analysis is very important source of information about the tourism destinations as modern tourists are heavily relaying on information available online during a destination selection process. The UGC analysis, though not highly representative on overall tourists' population, provides valuable information and, at the same time, is time and cost efficient, and provides a comprehensive picture of the research area.
Aims	The principal objectives of this research method is to gain deeper insight into: (1) how tourists search for information related to B&H (2) what are the key attributes of the image of B&H on the main generating markets (3) what are the key drivers for selecting B&H as a tourism destination
Research tool/ Data analysis	The analysis is carried out by utilizing software for social media content analysis

Quantitative research on B&H image (on-line web panel) on the inbound markets

Aims	The principal objectives of this primary research is to obtain representative information on perception of B&H among potential tourists from key and potential inbound markets (to answer the questions what, who and how frequent).
Population	For the purpose of this research, population is defined as citizens on the inbound markets who have travelled out of their own country within last year (outbound trips) but have not yet visited B&H
Sample	100 to 120 respondents per inbound market
Data collection	On-line web panel
Topics	The research content encompassed: • spontaneous associations on B&H, • recognisability of B&H tourist attractions, • the basic attributes of B&H as a country, • the perception of B&H as a tourist destination (products), • the perception of B&H tourist offer (suprastructure, security, contents), • intention to travel to B&H, • sociodemographics
Data analysis	By each country and by main sociodemographic segments

Quantitative research on attitudes and expenditures of domestic and inbound tourists in B&H (TOMAS Survey)

Aims	• Identification of tourists' profile as a basis for the market segmentation • Identification of the main advantages and disadvantages of the B&H tourism product • Basis for an estimation of direct impacts from tourist activity for the B&H economy • Tracking of the tourism demand trends • Monitoring the sustainability of tourist activity
Population	Tourists (domestic and inbound) in commercial accommodation activities
Sample	2,000 to 5,000 respondents, quota sampling, depending on level of representativeness and reliability, i.e. number of tourism products/regions covered
Data collection	Primary interview (questionnaire)
Topics	• Socio-demographic profile of B&H tourists • Motivation for visit • Loyalty to B&H • Sources of information on B&H tourism offer • Travel characteristics (travel party, means of transport, accommodation booking) • Characteristics of stay in a destination (length of stay, activities) • Attitudes (satisfaction and competitiveness) towards various elements of tourism offer • Tourism consumption
Data analysis	By type of accommodation facility, country of origin, region/tourism product

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APPENDIX: HOLIDAY PLANNING AND TRIP DECISION MAKING PROCESS PER B&H INBOUND MARKET - DETAILED

AUSTRIA

Holiday/destination research and choice

Participation in tourism

1,741,260 Austrian citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

45 years of age and older tourists are dominant group in outbound travel

84% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	285,880	16%
25 to 34	297,331	17%
35 to 44	285,685	16%
45 to 64	565,632	32%
65 and over	306,732	18%
TOTAL	1,741,260	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (16%)
- Once (10%)
- Twice (14%)
- 3 times (16%)
- 4 or 5 times (19%)
- 6 to 10 times (51%)
- More than 10 times (10%)

Outbound trips

Austrian citizens made a total of 11,534,238 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	9,169,462	83%
Holidays, leisure and recreation	7,573,587	66%
Visits to friends and relatives	1,736,935	15%
Other (e.g. pilgrimage, health treatment)	308,939	3%
Professional, business	1,914,776	17%
TOTAL	11,534,238	100%

Holidays, leisure and recreation dominant motives for outbound trips

Germany, Italy and Croatia top outbound destinations

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Germany	2,323,781	20%	1,556,554	16%
Italy	2,177,651	19%	2,056,727	21%
Croatia	1,416,323	12%	1,372,790	14%
Spain	627,857	5%	566,700	6%
Greece	368,656	3%	345,553	4%
France	343,669	3%	272,694	3%
Czech Republic	337,881	3%	269,142	3%
Hungary	335,355	3%	294,509	3%
United Kingdom	313,177	3%	267,294	3%
Switzerland	297,628	2%	185,190	2%
Slovenia	285,488	2%	262,587	2%
United States	210,539	2%	153,229	2%
Other countries	2,496,233	22%	2,016,493	21%
TOTAL	11,534,238	100%	9,619,462	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Austria (26%)
- Italy (15%)
- Croatia (10%)
- Germany (6%)
- Greece (5%)
- Spain (5%)
- Other EU28 (33%)
- Outside the EU28 (22%)

→ *Age not a relevant factor in choosing the destination*

Cities most popular type of destination

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	4,368,972	45%
Countryside	2,480,386	26%
Seaside	3,813,345	40%
Cruise ship	137,741	1%
Mountains	543,039	6%
Other	114,806	1%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,551,223	16%
25 to 34	1,571,906	16%
35 to 44	1,599,330	17%
45 to 64	3,446,634	36%
65 and over	1,450,368	15%
TOTAL	9,619,462	100%

Overnights on outbound trips

70% of outbound overnights realized on holiday/leisure trips

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	64,350,394	90%
Holidays, leisure and recreation	49,903,238	70%
Visits to friends and relatives	12,501,899	17%
Other (e.g. pilgrimage, health treatment)	1,945,258	3%
Professional, business	64,350,394	10%
TOTAL	71,472,963	100%

Italy, Croatia and Germany top destinations in outbound overnights

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Italy	11,843,558	17%	11,441,457	18%
Croatia	8,903,669	12%	8,739,267	14%
Germany	8,460,716	12%	6,360,104	10%
Spain	5,040,653	7%	4,791,714	7%
Greece	3,302,856	5%	3,188,046	5%
United States	2,716,463	4%	2,199,890	3%
France	2,438,394	3%	2,027,745	3%
Turkey	1,936,433	3%	1,847,070	3%
United Kingdom	1,719,407	2%	1,537,639	2%
Switzerland	1,173,118	2%	878,173	1%
Portugal	1,146,670	2%	1,102,732	2%
Hungary	1,120,831	2%	999,686	2%
Other countries	21,670,195	30%	19,236,871	30%
TOTAL	71,472,963	100%	64,350,394	100%

Most overnights realized in seaside destinations

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	25,536,647	40%
Countryside	17,764,914	28%
Seaside	31,082,810	48%
Cruise ship	1,315,617	2%
Mountains	4,478,313	7%
Other	1,385,065	2%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	10,217,102	16%
25 to 34	9,781,158	15%
35 to 44	9,536,086	15%
45 to 64	23,555,656	37%
65 and over	11,260,392	17%
TOTAL	64,350,394	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach holiday is the main reason for going on holiday

- Sun/beach (25%)
- Nature (14%)
- Visiting family/friends/relatives (VFR) (13%)
- Culture (13%)
- City trips (12%)
- Sport-related activities (9%)
- Wellness/Spa/health treatment (8%)
- Specific events (sporting events/festivals) (3%)
- Other reason (3%)

→ *Sun & beach less important with age (33% for 15-24, 28% for 25-39, 29% for 40-54 and 15% for 55+ years of age)*

→ *Culture increasingly important with age (8% for 15-24, 6% for 25-39, 10% for 40-54 and 23% for 55+ years of age)*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and quality of the accommodation the main factors in staying loyal to the destination

- Natural features (23%)
- Quality of the accommodation (20%)
- Cultural and historical attractions (16%)
- General level of prices (9%)
- How tourists are welcomed (9%)
- Activities/services available (7%)
- Accessible facilities for people with special needs (3%)
- Other reasons (6%)
- 5% don't go back to the same place

→ *The quality of accommodation more important for loyalty of tourists younger than 25 years of age (31%) compared to those older (18%)*

→ *The general level of prices more important for loyalty of tourists younger than 25 years of age (16%) compared to those older (8%)*

Environmentally-friendly factors

Almost every third tourist was influenced by sustainable/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 17% the accessibility of a destination by a means of environmentally-friendly transport
- 15% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 13% the introduction of sustainable/environmentally-friendly practices in the destination
- 10% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 62% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

→ *68% of those younger than 25 years of age were not influenced by any of the above factors when choosing the destination, compared to 55% of those older than 54 years of age*

Information sources

Recommendations, websites and personal experience the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (60%)
- Websites (53%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (39%)
  - Websites run by service provider or by destination (26%)
- Personal experience (40%)
- Counters of travel agencies and tourism offices (17%)
- Newspaper, radio or TV (17%)
- Paid for guidebooks and magazines (15%)
- Social media pages (13%)

→ *Personal experience more important for younger tourists (for 53% of those younger than 25 years of age and for 38% of older tourists)*
→ *Recommendations of friends, colleagues or relatives more important for younger tourists (for 78% aged 15-24, 68% aged 25-39, 59% aged 40-54 and 47% aged 55+)*
→ *Websites more important for younger tourists (for 62% of those younger than 55 years of age and for 35% of older tourists)*

Booking/transaction behaviors

Holiday organization

36% of outbound trips organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	3,151,553	36%
Non-package travel	5,616,080	64%
TOTAL	8,767,633	100%

Booking

Online commercial services most popular for booking

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 54% used online commercial services
  - 13% used online commercial services listing private housing offers from individuals
  - 46% used other online commercial services (tour operators, airline companies, etc.)
- 26% over the counter at a travel agency
- 17% over the phone
- 15% through someone they know
- 14% on-site (place of holidays)
- 6% over the counter of a transportation company
- 5% used other method(s)
- 6% did not book anything

→ *Online commercial services are used less often (38%) by older tourists (55+) compared to other age groups*

→ *41% of those older than 54 years of age booked their holiday over the counter at a travel agency*

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	2,321,439	26%
Booking of the main means of accommodation via tour operator or travel agency	3,342,080	38%
Internet booking of the main means of transport	2,350,950	27%
Internet booking of the main means of accommodation	3,727,449	43%
Booking of the trip independent: direct booking with the service provider	3,614,688	41%
Booking of the trip independent: no booking was needed	1,115,584	13%

Tourist services are most often purchased separately

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 9% usually went on an all-inclusive holiday
- 25% usually booked other types of package travel (not all-inclusive)
- 59% usually purchased tourist services separately

Planning/itinerary behaviors

Travel party

Partners are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 39% travelled with a partner
- 28% travelled with family members (including children)
- 23% travelled with friends
- 16% travelled with family members (adults only)
- 7% travelled alone
- 7% travelled with an organized group

→ *Travelling with a partner more common amongst older tourists (13% aged 15-24, 28% aged 25-39, 40% aged 40-54 and 56% aged 55+ travelled with a partner)*

→ *Travelling with friends more common amongst younger tourists (42% aged 15-24, 21% aged 25-39, 21% aged 40-54 and 20% aged 55+ travelled with a friend)*

Length of stay

Outbound trips with 4 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	3,21,.806	33%	7,415,153	12%
4 to 7 nights	4,018,192	42%	22,033,163	34%
8 to 14 nights	1,754,128	18%	19,369,339	30%
15+ nights	629,335	7%	15,532,739	24%

Type of accommodation

Hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	7,487,271	78%
Hotels or similar establishments	5,477,546	57%
Campsites, caravan or trailer park	369,386	4%
Other rented accommodation	1,640,339	17%
Total of non-rented accommodation	2,132,190	22%
Own holiday home	212,859	2%
Staying at relatives or friends	1,881,061	20%
Other non-rented accommodation	-	-
TOTAL	9,619,462	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	47,815,296	74%
Hotels or similar establishments	31,256,375	49%
Campsites, caravan or trailer park	3,449,359	5%
Other rented accommodation	13,109,562	20%
Total of non-rented accommodation	16,535,098	26%
Own holiday home	2,293,545	4%
Staying at relatives or friends	13,915,253	22%
Other non-rented accommodation	-	-
TOTAL	64,350,394	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 68% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 11% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 11% stayed with friends or relatives
- 5% went to a camp site
- 5% stayed at their own property or second home
- 3% used other type of accommodation

→ *Paid commercial accommodation more popular among older tourists (usually used by 48% of those younger than 25 years of age compared to 82% of tourists older than 54 years of age)*
→ *Staying with friends and relatives more popular among younger tourists (usually used by 26% of those younger than 25 years of age compared to 5% of tourists older than 54 years of age)*

Mode of transport

Car is the most important mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	3,300,006	34%
Land	6,280,700	65%
Motor vehicle	4,696,907	49%
Bus, coach	857,813	9%
Railways	577,036	6%
Other	148,944	2%
Waterway	38,756	0%
TOTAL	80,716,945	100%

Expenditures on outbound trips

Austrian tourists on average spent 854 € per outbound trip made for personal purposes

Austrian tourists on average spent 128 € per day on an outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	854 €	268 €	353 €	233 €
Business	969 €	411 €	393 €	165 €
TOTAL	874 €	292 €	360 €	222 €

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	128 €	40 €	53 €	35 €
Business	261 €	110 €	106 €	44 €
TOTAL	141 €	47 €	58 €	36 €

(in %)

Purpose	Total	Transport	Accommo-dation	Other
Personal	100%	31%	41%	28%
Business	100%	42%	40%	18%
TOTAL	100%	33%	41%	26%

45 to 64 years old citizens are biggest spenders on outbound trips

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	1,121,619	14%
25 to 34	1,242,295	15%
35 to 44	1,249,802	15%
45 to 64	3,188,152	39%
65 and over	1,417,267	17%
TOTAL	8,219,136	100%

CROATIA

Holiday/destination research and choice

Participation in tourism

221,562 Croatian citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

The dominant group in outbound travel are tourists from 45 to 64 years of age

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	31,166	14%
25 to 34	53,055	24%
35 to 44	36,675	17%
45 to 64	72,100	33%
65 and over	28,566	13%
TOTAL	221,562	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (28%)
- Once (14%)
- Twice (9%)
- 3 times (12%)
- 4 or 5 times (16%)
- 6 to 10 times (11%)
- More than 10 times (10%)

→ *88% of those younger than 25 years of age travelled at least once, compared to 63% of those older than 54 years of age*

Outbound trips

Croatian citizens made a total of 1,614,859 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	1,211,400	75%
Holidays, leisure and recreation	548,535	34%
Visits to friends and relatives	471,643	29%
Other (e.g. pilgrimage, health treatment)	191,221	12%
Professional, business	403,460	25%
TOTAL	1,614,859	100%

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Germany, Italy, Austria and Slovenia top outbound destinations

Destination	Total trips N	Total trips %	Personal trips N	Personal trips %
Germany	277,689	17%	144,791	12%
Italy	203,438	13%	165,828	14%
Austria	168,556	10%	136,997	11%
Slovenia	143,642	9%	110,638	9%
Czech Republic	63,294	4%	30,462	3%
Spain	44,219	3%	-	-
Hungary	42,023	3%	33,363	3%
France	34,825	2%	31,694	3%
Switzerland	22,446	1%	-	-
Other countries	614,727	38%	557,627	46%
TOTAL	1,614,859	100%	1,211,400	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Croatia (68%)
- Italy (4%)
- Austria (3%)
- Hungary (3%)
- Slovenia (3%)
- Czech Republic (2%)
- France (2%)
- In EU28 (22%)
- Outside the EU28 (9%)

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	526,577	43%
Countryside	83,576	7%
Seaside	50,015	4%
Cruise ship	-	-
Mountains	48,096	4%
Other	818,870	68%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	224,992	19%
25 to 34	268,586	22%
35 to 44	232,706	19%
45 to 64	367,006	30%
65 and over	118,109	10%
TOTAL	1,211,400	100%

Overnights on outbound trips

36% of outbound overnights realized on visits to friends and relatives

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	6,285,651	73%
Holidays, leisure and recreation	2,451,544	28%
Visits to friends and relatives	3,151,216	36%
Other (e.g. pilgrimage, health treatment)	682,892	8%
Professional, business	2,358,653	27%
TOTAL	8,644,304	100%

Germany, Slovenia and Italy top destinations in outbound overnights

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Germany	1,692,504	20%	1,067,735	17%
Slovenia	1,071,588	12%	337,181	5%
Italy	838,693	10%	740,106	12%
Austria	564,409	7%	493,223	8%
Spain	324,345	4%	-	-
Czech Republic	294,524	3%	196,720	3%
France	195,315	2%	175,712	3%
Switzerland	192,079	2%	-	-
Other countries	3,470,847	40%	3,274,974	52%
TOTAL	8,644,304	100%	6,285,651	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*

Multiple response.

Type of destination	N	%
City	2,615,381	42%
Countryside	310,614	5%
Seaside	395,484	6%
Cruise ship	-	-
Mountains	203,309	3%
Other	4,491,119	71%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,184,875	19%
25 to 34	1,090,177	17%
35 to 44	1,213,512	19%
45 to 64	1,784,275	28%
65 and over	1,012,812	16%
TOTAL	6,285,651	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach holiday is the main reason for going on holiday

- Sun/beach (36%)
- Visiting family/friends/relatives (VFR) (26%)
- Nature (8%)
- City trips (10%)
- Culture (5%)
- Wellness/Spa/health treatment (4%)
- Sport-related activities (2%)
- Specific events (sporting events/festivals) (4%)
- Other reason (5%)

→ *Tourists younger than 25 years of age are the most interested in sun & beach (50%) and the less interested are those older than 54 (22%).*

→ *Tourists most interested in culture (9%) are those older than 54 years of age and the less interested are those younger than 25 (5%)*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and cultural and historical attractions are main factors in staying loyal to the destination	○ Natural features (22%) ○ Cultural and historical attractions (16%) ○ Quality of the accommodation (11%) ○ General level of prices (12%) ○ The activities/services available (7%) ○ How tourists are welcomed (6%) ○ Accessible facilities for people with special needs (4%) ○ Other reasons (11%) ○ 4% don't go back to the same place → *Importance of activities/services available for loyalty of tourists is decreasing with age (the main return reason for 13% of those younger than 25, 10% of those from 25-39 of age, 7% of those from 40-54 of age and for 2% of older tourists)*

Environmentally-friendly factors

Every second tourist was influenced by sustainable/ environmentally-friendly practices when choosing a destination Younger tourist pay more attendtion to means of transport with low impact on environment	**Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015** *(Flash Eurobarometer 432)* ○ 17% the accessibility of a destination by a means of environmentally-friendly transport ○ 16% the introduction of sustainable/environmentally-friendly practices in the destination ○ 13% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility ○ 8% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices ○ 50% not influenced by any of the above factors when choosing the destination of the main holiday in 2015 → *43% of those younger than 25 years of age were not influenced by any of the above factors when choosing the destination, compared to 57% of those older than 54 years of age*

Information sources

Recommendations, websites and personal experience the most important sources of information

Websites as source for getting informations about the destinations is more popular with younger generations of tourists

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (50%)
- Websites (35%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (24%)
  - Websites run by service provider or by destination (19%)
- Personal experience (34%)
- Social media pages (12%)
- Newspaper, radio or TV (10%)
- Counters of travel agencies and tourism offices (6%)
- Paid for guidebooks and magazines (4%)

→ *Recommendations of friends, colleagues or relatives is decreasing with age (60% aged 15-24, 55% aged 25-39, 53% aged 40-54 and 39% aged 55+)*
→ *Usage of websites for getting information about destinations is decreasing with age of tourists (56% of those younger than 25 use it, 51% of tourists aged 25-39, 32% of tourists aged 40-54 and 18% of older tourists)*

Booking/transaction behaviors

Holiday organization

Every fifth outbound trip organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	420,037	21%
Non-package travel	1,606,277	79%
TOTAL	2,026,314	100%

Booking

23% used online services for booking, 26% did not book anything in advance

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 23% used online commercial services
  - 16% used online commercial services listing private housing offers from individuals
  - 7% used other online commercial services (tour operators, airline companies, etc.)
- 18% through someone they know
- 14% over the counter at a travel agency
- 9% over the phone
- 6% over the counter of transportation company
- 5% on-site (place of holidays)
- 5% used other method(s)
- 26% did not book anything

→ *Online commercial services are used less often (6%) by older tourists (55+) compared to other age groups*

→ *26% of those younger than 25 years of age booked their holiday over the counter of a transportation company, compared to 1% of those older than 54 years of age*

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	509,038	32%
Booking of the main means of accommodation via tour operator or travel agency	459,695	29%
Internet booking of the main means of transport	348,453	22%
Internet booking of the main means of accommodation	489,638	30%
Booking of the trip independent: direct booking with the service provider	273,251	17%
Booking of the trip independent: no booking was needed	1,130,069	70%

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 16% usually went on an all-inclusive holiday
- 29% usually booked other types of package travel (not all-inclusive)
- 31% usually purchased tourist services separately

Planning/itinerary behaviors

Travel party

Croatian tourists usually travel in couples or with family

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 13% travelled alone
- 26% travelled with a partner
- 15% travelled with family members (adults only)
- 28% travelled with family members (including children)
- 19% travelled with friends
- 6% travelled with an organized group

→ *Travelling with a partner is increasing with age (15% aged 15-24, 23% aged 25-39, 24% aged 40-54 and 37% aged 55+ travelled with a partner)*

→ *Travelling with friends more common amongst younger tourists (62% aged 15-24, 15% aged 25-39, 12% aged 40-54 and 7% aged 55+ travelled with a friend)*

Length of stay

Outbound trips with 1 to 3 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	640,416	53%	1,317,299	21%
4 to 7 nights	381,104	31%	2,036,879	32%
8 to 14 nights	130,742	11%	1,335,436	21%
15+ nights	59,138	5%	1,596,037	25%

Type of accommodation

Staying at relatives or friends and hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	658,617	54%
Hotels or similar establishments	467,172	39%
Campsites, caravan or trailer park	-	-
Other rented accommodation	188,898	16%
Total of non-rented accommodation	552,782	46%
Own holiday home	50,592	4%
Staying at relatives or friends	496,755	41%
Other non-rented accommodation	-	-
TOTAL	1,211,400	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	2,657,275	42%
Hotels or similar establishments	1,865,524	30%
Campsites, caravan or trailer park	-	-
Other rented accommodation	756,235	12%
Total of non-rented accommodation	3,628,375	58%
Own holiday home	322,361	5%
Staying at relatives or friends	3,245,652	52%
Other non-rented accommodation	-	-
TOTAL	6,285,651	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 30% stayed with friends or relatives
- 28% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 12% stayed at their own property or second home
- 24% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 2% went to a camp site

→ *Paid commercial accommodation more popular among younger tourists (usually used by 40% of those younger than 25 years of age compared to 20% of older tourists)*

Mode of transport

Car is the most important mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	182,127	15%
Land	1,025,353	85%
Motor vehicle	653,652	54%
Bus, coach	356,052	29%
Railways	-	-
Other	-	-
Waterway	-	-
TOTAL	1,211,400	100%

Expenditures on outbound trips

Croatian tourists on average spent 358 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Restaurants/ cafés	Accommo-dation	Other
Personal	358 €	118 €	86 €	94 €	58 €
Business	648 €	267 €	121 €	192 €	66 €
TOTAL	430 €	156 €	94 €	119 €	60 €

Croatian tourists on average spent 69 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Restaurants/ cafés	Accommo-dation	Other
Personal	69 €	22 €	16 €	18 €	11 €
Business	110 €	45 €	21 €	32 €	11 €
TOTAL	80 €	29 €	17 €	22 €	11 €

(in %)

Purpose	Total	Transport	Restaurants/ cafés	Accommo-dation	Other
Personal	100%	36%	22%	28%	14%
Business	100%	33%	25%	26%	16%
TOTAL	100%	41%	19%	30%	10%

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	94,365	22%
25 to 34	95,651	22%
35 to 44	79,330	18%
45 to 64	119,711	28%
65 and over	44,649	10%
TOTAL	433,706	100%

FRANCE

Holiday/destination research and choice

Participation in tourism

2,237,982 French citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

The dominant group in outbound travel are tourists between 45 and 64 years of age

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	498,886	22%
25 to 34	214,380	10%
35 to 44	340,873	15%
45 to 64	753,751	34%
65 and over	430,092	19%
TOTAL	2,237,982	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (20%)
- Once (12%)
- Twice (11%)
- 3 times (11%)
- 4 or 5 times (11%)
- 6 to 10 times (16%)
- More than 10 times (19%)

→ *89% of those younger than 25 years of age travelled at least once, compared to 74% of those older than 54 years of age*

Outbound trips

French citizens made a total of 200,063,793 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	20,971,275	89%
Holidays, leisure and recreation	16,571,560	70%
Visits to friends and relatives	3,439,647	15%
Other (e.g. pilgrimage, health treatment)	960,068	4%
Professional, business	2,565,847	11%
TOTAL	23,537,122	100%

Holidays, leisure and recreation dominant motives for outbound trips

Spain, Italy and Germany top outbound destinations

Cities most popular type of destination

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	4,359,388	19%	4,125,662	20%
Italy	3,050,903	13%	2,794,563	13%
Germany	1,603,669	7%	1,231,846	12%
United Kingdom	1,584,651	7%	1,346,050	6%
Belgium	1,488,443	6%	1,317,894	6%
Portugal	1,467,406	6%	1,401,099	7%
United States	856,258	4%	751,471	4%
Greece	839,634	4%	836,238	4%
Switzerland	704,993	3%	584,277	3%
Netherlands	672,265	3%	557,548	3%
Canada	328,512	1%	295,307	1%
Austria	327,729	1%	311,771	1%
Other countries	6,253,271	27%	5,417,549	26%
TOTAL	23,537,122	100%	20,971,275	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- France (66%)
- Germany (10%)
- Spain (7%)
- Italy (4%)
- Austria (6%)
- USA (3%)
- In EU28 (21%)
- Outside the EU28 (13%)

→ *21% of those younger than 25 years of age travel outside EU compared to around 10% of those older than 25 years of age*

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	7,359,582	35%
Countryside	1,817,621	9%
Seaside	5,232,426	25%
Cruise ship	514,933	2%
Mountains	1,169,448	6%
Other	8,293,838	40%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	2,575,413	12%
25 to 34	2,574,150	12%
35 to 44	3,365,243	16%
45 to 64	7,662,434	37%
65 and over	4,794,035	23%
TOTAL	20,971,275	100%

Overnights on outbound trips in 2016 *(Eurostat)*

Holidays, leisure and recreation dominant motives for outbound trips

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	188,264,084	94%
Holidays, leisure and recreation	148,514,371	74%
Visits to friends and relatives	30,370,098	15%
Other (e.g. pilgrimage, health treatment)	9,379,615	5%
Professional, business	11,799,709	6%
TOTAL	200,063,793	100%

Spain, Italy and Portugal top outbound destinations in realized overnights

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	36,489,994	18%	35,520,986	19%
Italy	22,873,795	11%	21,985,082	12%
Portugal	13,398,445	7%	12,976,631	7%
United States	11,374,977	6%	10,673,953	6%
Greece	8,511,465	4%	8,470,714	4%
United Kingdom	8,480,183	4%	8,069,205	4%
Germany	8,008,541	4%	7,788,338	4%
Canada	5,374,790	3%	6,534,044	3%
Belgium	4,941,371	2%	4,707,225	3%
Switzerland	3,172,789	2%	4,576,653	2%
Netherlands	2,644,456	1%	2,270,074	1%
Poland	2,436,780	1%	2,326,322	1%
Ireland	2,303,324	1%	2,233,257	1%
Austria	2,254,002	1%	2,179,518	1%
Other countries	67,798,881	34%	57,952,082	31%
TOTAL	200,063,793	100%	188,264,084	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	63,636,174	34%
Countryside	19,423,991	10%
Seaside	56,209,800	30%
Cruise ship	4,801,444	3%
Mountains	11,310,812	6%
Other	73,914,991	39%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	25,446,445	14%
25 to 34	20,011,761	11%
35 to 44	27,448,264	15%
45 to 64	69,204,525	37%
65 and over	46,153,090	25%
TOTAL	188,264,084	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Visiting friends and relatives and sun & beach holiday and the main reasons for going on holiday	○ Visiting family/friends/relatives (VFR) (29%) ○ Sun/beach (22%) ○ Nature (14%) ○ City trips (10%) ○ Culture (9%) ○ Wellness/Spa/health treatment (6%) ○ Sport-related activities (3%) ○ Specific events (sporting events/festivals) (3%) ○ Other reason (4%) → *Nature is more important for tourists aged 25 and over (16%) compared to younger tourists (5%)*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features are the main factor in staying loyal to the destination	○ Natural features (36%) ○ Cultural and historical attractions (14%) ○ Quality of the accommodation (13%) ○ How tourists are welcomed (9%) ○ General level of prices (8%) ○ Activities/services available (5%) ○ Accessible facilities for people with special needs (2%) ○ Other reasons (6%) ○ 3% don't go back to the same place → *Cultural and historical attractions are more important for loyalty of tourists younger than 25 years of age (23%) compared to those older than 54 years of age (13%)* → *Activities/services available are more important for loyalty of tourists younger than 25 years of age (11%) compared to older tourists, especially those older than 54 years of age (3%)*

Environmentally-friendly factors

48% of tourist are influenced by sustainable/ environmentally-friendly practices when choosing the destination Younger tourist pay more attendtion to sustainable/ environmentally-friendly practices than older ones	**Relevance of environmentally-friendly factors when choosing the destination for main holiday in 2015** *(Flash Eurobarometer 432)* ○ 21% the introduction of sustainable/environmentally-friendly practices in the destination ○ 13% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility ○ 11% the accessibility of a destination by a means of environmentally-friendly transport ○ 11% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices ○ 52% not influenced by any of the above factors when choosing the destination of the main holiday in 2015 → *46% of those younger than 25 years of age were not influenced by any of the above factors when choosing the destination, compared to 57% of those in age group from 25-39*

Information sources

Recommendations, personal experience and websites the most important sources of information

Websites as source for getting informations about the destinations is more popular with younger generations of tourists

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (57%)
- Websites (50%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (40%)
  - Websites run by service provider or by destination (17%)
- Personal experience (37%)
- Counters of travel agencies and tourism offices (13%)
- Paid for guidebooks and magazines (10%)
- Newspaper, radio or TV (12%)
- Social media pages (6%)

→ *Recommendations of friends, colleagues or relatives more important for younger tourists (for 68% aged 15-24, 64% aged 25-39, 61% aged 40-54 and 45% aged 55+)*

→ *Usage of websites for getting information about destinations is decreasing with age of tourists (73% of those younger than 25 use it, 62% of tourist from 25-39 of age use it, 55% of tourists from 40-54 of age use it and 31% of tourist older than 54 use it)*

Market segments *(HTZ: TGI France 2014)*

Explorers
- Visiting towns, museums and exploring local gastronomy favorite activities
- Information sources
  - Tourist guides (46%)
  - Online travel recommendations (43%)
  - Travel party (43%)
  - Websites of travel agencies (42%)
  - Tourist offices (32%)

Sun & beach guests
- Going to beaches, shopping and relaxation favorite activities
- Information sources
  - Websites of travel agencies (51%)
  - Tourist guides (48%)
  - Online travel recommendations (46%)
  - Travel party (44%)
  - Tourist offices (36%)

Adventurers
- Adventure sports, trekking and water sports favorite activities
- Information sources
  - Tourist guides (54%)
  - Websites of travel agencies (53%)
  - Travel party (47%)
  - Online travel recommendations (43%)
  - Tourist offices (37%)

Booking/transaction behaviors

Booking	

Online commercial services used for booking by every second visitor	**Methods used to book holiday in 2015** *(Flash Eurobarometer 432)*
	Multiple response.
	○ 51% used online commercial services
	  ○ 25% used online commercial services listing private housing offers from individuals
	  ○ 33% used other online commercial services (tour operators, airline companies, etc.)
	○ 19% through someone they know
	○ 16% over the phone
	○ 11% used other method(s)
	○ 11% did not book anything
	○ 10% over the counter at a travel agency
	○ 10% on-site (place of holidays)
	○ 7% over the counter of a transportation company (airline company, railway company, etc.)
	→ *Online commercial services are used less often (40%) by older tourists (55+) compared to other age groups*

Every fifth tourist usually went on an all-inclusive holiday	**Type of holiday (with 4 to 13 overnights) taken most often in 2015** *(Flash Eurobarometer 432)* ○ 20% usually went on an all-inclusive holiday ○ 45% usually booked other types of package travel (not all-inclusive) ○ 25% usually purchased tourist services separately → *Tourists who usually book other type of package travel (not all-inclusive) are those from 40-54 years of age (56%)*

Planning/itinerary behaviors

Travel party	
French tourists usually travel in couples or with family	**Travel party on the main holiday in 2015** *(Flash Eurobarometer 432)* *Multiple response.* ○ 7% travelled alone ○ 42% travelled with a partner ○ 16% travelled with family members (adults only) ○ 41% travelled with family members (including children) ○ 19% travelled with friends ○ 5% travelled with an organized group → *Travelling with a partner is increasing with age (21% aged 15-24, 37% aged 25-39, 41% aged 40-54 and 55% aged 55+ travelled with a partner)*

Length of stay

Outbound trips with 4 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	4,722,287	23%	10,492,086	6%
4 to 7 nights	7,801,740	37%	45,738,982	25%
8 to 14 nights	5,233,574	25%	56,418,523	30%
15+ nights	3,186,480	15%	72,464,046	39%

Type of accommodation

Hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	16,414,655	78%
Hotels or similar establishments	10,765,631	51%
Campsites, caravan or trailer park	623,030	3%
Other rented accommodation	5,025,994	24%
Total of non-rented accommodation	4,556,620	22%
Own holiday home	204,806	1%
Staying at relatives or friends	3,999,583	19%
Other non-rented accommodation	352,231	2%
TOTAL	20,971,275	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	139,802,002	74%
Hotels or similar establishments	82,894,296	44%
Campsites, caravan or trailer park	8,889,031	5%
Other rented accommodation	48,018,675	26%
Total of non-rented accommodation	48,462,083	26%
Own holiday home	4,096,777	2%
Staying at relatives or friends	39,974,573	21%
Other non-rented accommodation	4,390,733	2%
TOTAL	188,264,084	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 35% stayed with friends or relatives
- 30% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 16% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 12% went to a camp site
- 6% stayed at their own property or second home

→ *Paid commercial accommodation more popular among older tourists (usually used by 27% of those younger than 25 years of age compared to 37% of tourists older than 54 years of age)*

Mode of transport

Plane is the most important mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	12,080,350	58%
Land	8,485,265	40%
Motor vehicle	6,048,893	29%
Bus, coach	1,024,645	5%
Railways	1,378,109	7%
Other	-	-
Waterway	405,660	2%
TOTAL	20,971,275	100%

Expenditures on outbound trips

French tourists on average spent 1011 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafés	Other
Personal	1,011 €	328 €	319 €	179 €	183 €
Business	1,065 €	481 €	310 €	137 €	136 €
TOTAL	1,017 €	345 €	318 €	174 €	178 €

French tourists on average spent 112 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafés	Other
Personal	112 €	36 €	35 €	20 €	20 €
Business	231 €	104 €	67 €	30 €	29 €
TOTAL	119 €	40 €	37 €	20 €	21 €

(in %)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafés	Other
Personal	100%	32%	31%	18%	18%
Business	100%	45%	29%	13%	13%
TOTAL	100%	34%	31%	17%	18%

45 to 64 years old citizens are biggest spenders on outbound trips

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	2,294,278	11%
25 to 34	2,303,290	11%
35 to 44	3,271,568	15%
45 to 64	7,949,781	37%
65 and over	5,394,467	25%
TOTAL	21,213,383	100%

GERMANY

Holiday/destination research and choice

Participation in tourism

11,653,331 German citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

45 years of age and older tourists are dominant group in outbound travel

79% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	2,121,485	18%
25 to 34	1,819,532	16%
35 to 44	1,379,456	12%
45 to 64	3,915,214	34%
65 and over	2,417,644	21%
TOTAL	11,653,331	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (20%)
- Once (16%)
- Twice (16%)
- 3 times (12%)
- 4 or 5 times (17%)
- 6 to 10 times (11%)
- More than 10 times (7%)

→ *89% of those younger than 25 years of age travelled at least once, compared to 73% of those older than 54 years of age*

Outbound trips

German citizens made a total of 90,965,601 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	80,716,945	89%
Holidays, leisure and recreation	64,357,917	71%
Visits to friends and relatives	13,583,200	15%
Other (e.g. pilgrimage, health treatment)	2,775,828	3%
Professional, business	10,248,656	11%
TOTAL	90,965,601	100%

Holidays, leisure and recreation dominant motives for outbound trips

Italy, Austria and Spain top outbound destinations

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Italy	11,548,473	13%	11,017,624	14%
Austria	11,379,674	13%	10,456,646	13%
Spain	10,392,755	11%	9,610,186	12%
Netherlands	6,763,021	7%	6,326,413	8%
France	5,158,745	6%	4,255,896	5%
Poland	3,436,248	4%	3,245,161	4%
Turkey	3,344,637	4%	3,247,412	4%
Switzerland	3,323,933	4%	2,727,541	3%
United Kingdom	3,178,819	3%	2,610,680	3%
Greece	2,503,954	3%	2,434,542	3%
United States	2,223,102	2%	1,729,703	2%
Denmark	1,909,579	2%	1,782,502	2%
Other countries	25,802,661	28%	21,272,639	26%
TOTAL	90,965,601	100%	80,716,945	100%

Top 10 outbound destinations in 2016 for holiday trips with 5+ days *(ReiseAnalyse)*

Destination	%
Spain	15%
Italy	8%
Turkey	6%
Austria	5%
Greece	4%
Croatia	3%
France	3%
Netherlands	3%
Poland	2%
Denmark	2%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Germany (33%)
- Spain (9%)
- Italy (8%)
- Austria (6%)
- France (4%)
- Greece (4%)
- Other EU28 (14%)
- Outside the EU28 (21%)

→ *Age not a relevant factor in choosing the destination*

Cities most popular type of destination

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	41,551,181	51%
Countryside	30,479,822	38%
Seaside	38,092,516	47%
Cruise ship	2,790,941	3%
Mountains	18,866,839	23%
Other	9,718,781	12%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	12,352,464	15%
25 to 34	14,506,839	18%
35 to 44	10,671,868	13%
45 to 64	27,699,128	34%
65 and over	15,486,647	19%
TOTAL	80,716,945	100%

Overnights on outbound trips

74% of outbound overnights realized on holiday/leisure trips

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	710,015,465	92%
Holidays, leisure and recreation	571,776,035	74%
Visits to friends and relatives	113,880,027	15%
Other (e.g. pilgrimage, health treatment)	24,359,403	3%
Professional, business	60,910,662	8%
TOTAL	770,926,126	100%

Spain, Italy and Austria top destinations in outbound overnights

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	95,229,884	12%	91,401,168	13%
Italy	93,365,396	12%	90,458,249	13%
Austria	60,491,798	8%	57,462,278	8%
France	41,925,259	5%	37,816,622	5%
Turkey	34,425,894	4%	33,919,295	5%
Netherlands	30,109,497	4%	28,525,171	4%
United States	27,237,011	4%	24,236,102	3%
Greece	26,444,622	3%	25,820,719	4%
Poland	23,505,393	3%	23,004,306	3%
United Kingdom	19,551,308	3%	15,542,499	2%
Croatia	15,928,115	2%	15,928,115	2%
Switzerland	15,744,009	2%	13,760,806	2%
Portugal	15,522,907	2%	12,190,992	2%
Other countries	271,445,033	35%	239,949,143	34%
TOTAL	770,926,126	100%	710,015,465	100%

Most overnights realized in seaside destinations

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	363,134,781	51%
Countryside	297,536,965	42%
Seaside	406,810,295	57%
Cruise ship	30,053,365	4%
Mountains	164,335,645	23%
Other	97,772,062	14%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	105,523,566	15%
25 to 34	124,037,623	17%
35 to 44	87,547,573	12%
45 to 64	236,129,121	33%
65 and over	156,777,582	22%
TOTAL	710,015,465	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach and visiting friends and relatives most often cited as the main reasons for going on holiday

- Sun/beach (25%)
- Visiting family/friends/relatives (VFR) (21%)
- Nature (15%)
- City trips (9%)
- Culture (9%)
- Wellness/Spa/health treatment (7%)
- Sport-related activities (6%)
- Specific events (sporting events/festivals) (2%)
- Other reason (5%)

→ *Older tourists (55+) less motivated by sun & beach holiday (18%), but more with culture (14%) compared to other age groups*
→ *Nature increasingly important with age (7% for 15-24, 10% for 25-39, 16% for 40-54 and 18% for 55+ years of age)*
→ *VFR less important with age (31% for 15-24, 27% for 25-39, 18% for 40-54 and 17% for 55+ years of age)*

Most popular types of holiday by target group

Senior singles and couples less prefer beach holiday than younger singles and couples

Most popular types of holiday by target group *(ReiseAnalyse)*

Singles		Young couples without children		Families with children	
Beach holiday	25%	Holiday to rest and relax	23%	Family holiday	49%
Holiday to rest and relax	16%	Beach holiday	22%	Beach holiday	16%
Visiting family and friends	12%	Family holiday	12%	Visiting family and friends	12%
Family holiday	7%	Activity holiday	7%	Holiday to rest and relax	9%
Party holiday	7%	Visiting family and friends	7%	Activity holiday	4%
Adventure/ experience holiday	7%	Adventure/ experience holiday	7%	Adventure/ experience holiday	3%
Activity holiday	6%	Nature holiday	6%	Nature holiday	2%

Senior couples		Senior singles	
Holiday to rest and relax	25%	Holiday to rest and relax	20%
Beach holiday	12%	Visiting family and friends	15%
Nature holiday	12%	Beach holiday	10%
Family holiday	9%	Adventure/ experience holiday	10%
Visiting family and friends	8%	Nature holiday	9%
Adventure/ experience holiday	7%	Family holiday	7%
Tour	6%	Health holiday	7%

Short breaks – holiday trips of 2-4 days in 2016 by type of travel *(ReiseAnalyse)*

Multiple response.

City breaks and visiting family and friends the most important drivers of short breaks

- City break (36%)
- Visiting family and friends (27%)
- Holiday to relax (16%)
- Cultural trip (12%)
- Activity holiday (10%)
- Nature holiday (8%)
- Shopping trip (7%)
- Health, fitness, wellness holiday (7%)

- Events (sports, festival, etc.) (6%)
- Beach/sunbathing holiday (4%)
- Cruise (1%)
- Other (5%)

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and quality of the accommodation main factors in staying loyal to the destination

- Natural features (25%)
- Quality of the accommodation (18%)
- Cultural and historical attractions (13%)
- General level of prices (6%)
- Activities/services available (5%)
- How tourists are welcomed (5%)
- Accessible facilities for people with special needs (1%)
- Other reasons (9%)
- 8% don't go back to the same place

Key aspects when choosing a holiday destination

Good value for money, beautiful landscape and good weather/climate key aspects in choosing a holiday destination

Key aspects when choosing a holiday destination in 2016 *(ReiseAnalyse)*

Multiple response.

- Good value for money (65%)
- Beautiful landscape (59%)
- Good weather/climate (56%)
- Good opportunities for swimming (50%)
- Hospitality, friendly people (46%)
- Personal safety (42%)
- Acceptable political and social situation (35%)
- Good service (32%)
- Good weather guaranteed (30%)
- Great accommodation (28%)
- Cultural sights and events (27%)
- Interesting cities (24%)
- Spectacular nature (20%)
- Good opportunities for hiking (19%)
- Suitable for family holidays (19%)
- Environmentally friendly destination (17%)
- Unique destination (16%)
- Good opportunities for cycling (12%)
- Good opportunities for winter sports (3%)
- None of these (3%)

Environmentally-friendly factors

Every second tourist was influenced by sustain-able/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 16% the accessibility of a destination by a means of environmentally-friendly transport
- 15% the introduction of sustainable/environmentally-friendly practices in the destination
- 12% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 7% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 50% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

→ *39% of those younger than 25 years of age were not influenced by any of the above factors when choosing the destination, compared to 52% of those older*

Information sources

Recommendations, personal experience and websites the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (44%)
- Personal experience (39%)
- Websites (37%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (24%)
  - Websites run by service provider or by destination (19%)
- Paid for guidebooks and magazines (15%)
- Counters of travel agencies and tourism offices (14%)
- Newspaper, radio or TV (13%)
- Social media pages (8%)

→ *Personal experience more important for younger tourists (for 49% of those younger than 25 years of age and for 27% of older tourists)*
→ *Recommendations of friends, colleagues or relatives more important for younger tourists (for 59% aged 15-24, 48% aged 25-39, 47% aged 40-54 and 34% aged 55+)*

Inspiring formats when choosing a holiday destination

Pictures/photos dominant inspiring formats when choosing a holiday destination

Inspiring formats when choosing a holiday destination in 2016 by age group *(ReiseAnalyse)*
Multiple response.

Format	14-29 years	50-70 years
Pictures/photos	64%	66%
Written consent	47%	48%
Video clips/film	36%	31%
Conversations	32%	25%
Maps etc.	25%	35%

Internet usage in destination choice *(HTZ: Bitkom)*

Internet crucial in holiday research, planning and booking for 45% of German citizens

- 45% dependent on the Internet for research, planning and booking their holiday
- 34% gets inspirations for new destinations on the Internet
- 28% reads the evaluations on the Internet before booking a travel

Internet usage in obtaining information about holidays in 2016 *(ReiseAnalyse)*

- 62% used the Internet at some point to search for information about holidays

Booking/transaction behaviors

Holiday organization

Every third outbound trip organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	23,373,361	32%
Non-package travel	50,074,427	68%
TOTAL	73,447,789	100%

Package travel more popular for longer holiday trips (5+ days)

Short breaks – outbound holiday trips of 2-4 days in 2016 by type of organization *(ReiseAnalyse)*
Multiple response.

Type of organization	City breaks	Destinations outside cities
Tour package	33%	24%
Accommodation separately	55%	49%
Tickets separately	46%	19%
Other services separately	14%	9%
No advance booking	3%	20%

Holiday trips of 5+ days in 2016 by type of organization *(ReiseAnalyse)*
Multiple response.

Type of organization	%
Tour package	43%
Accommodation separately	36%
Tickets separately	15%
Other services separately	7%
No advance booking	13%

Package travel dominant in holiday trips to Mediterranean

Outbound holiday trips of 5+ days in 2016 by type of organization for Mediterranean destinations *(ReiseAnalyse)*
Multiple response.

Type of organization	%
Tour package	66%
Accommodation separately	16%
Tickets separately	16%
Other services separately	6%
No advance booking	7%

Booking

Online commercial services most popular for booking

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 46% used online commercial services
  - 23% used online commercial services listing private housing offers from individuals
  - 28% used other online commercial services (tour operators, airline companies, etc.)
- 27% over the counter at a travel agency
- 13% over the phone

- 11% through someone they know
- 10% on-site (place of holidays)
- 4% used other method(s)
- 3% over the counter of a transportation company
- 10% did not book anything

→ *Online commercial services are used less often (40%) by older tourists (55+) compared to other age groups*

→ *21% of those younger than 25 years of age booked their holiday over the counter at a travel agency, compared to 32% of those older than 54 years of age*

Personal conversation the most popular channel for booking longer holiday trips (5+ days), followed by online booking

Booking channels for holiday trips of 5+ days in 2016 *(ReiseAnalyse)*
Multiple response.

Booking channels	%
Personal conversation	42%
Online booking	37%
E-mail	10%
Phone	20%
Letter/fax	2%

Booking offices for holiday trips of 5+ days in 2016 *(ReiseAnalyse)*
Multiple response.

Booking offices	%
Travel agent	33%
Direct with accommodation provider	28%
Internet portals	18%
Direct with transport company	12%
Direct with tour operator	7%
Tourist information/accommodation office	4%

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	21,184,299	29%
Booking of the main means of accommodation via tour operator or travel agency	23,490,647	32%
Internet booking of the main means of transport	25,202,177	34%
Internet booking of the main means of accommodation	32,823,905	45%
Booking of the trip independent: direct booking with the service provider	39,791,443	54%
Booking of the trip independent: no booking was needed	6,855,843	9%

Tourist services are most often purchased separately

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 17% usually went on an all-inclusive holiday
- 26% usually booked other types of package travel (not all-inclusive)
- 44% usually purchased tourist services separately

Planning/itinerary behaviors

Making the travel decision

Two thirds of German citizens plan their holiday one to six months in advance

Start of planning the main holiday in 2016 *(ReiseAnalyse)*

Start of planning	%
More than 6 months before departure	25%
4 to 6 months before departure	39%
1 to 3 months before departure	29%
During the 4 weeks before departure	8%

Making the decision about the main holiday in 2016 *(ReiseAnalyse)*

Decision	%
More than 6 months before departure	12%
4 to 6 months before departure	25%
1 to 3 months before departure	45%
During the 4 weeks before departure	17%

Travel party

Family members are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*

Multiple response.

- 7% travelled alone
- 41% travelled with a partner
- 16% travelled with family members (adults only)
- 28% travelled with family members (including children)
- 16% travelled with friends
- 5% travelled with an organized group

→ *Travelling with a partner more common amongst older tourists (18% aged 15-24, 36% aged 25-39, 36% aged 40-54 and 56% aged 55+ travelled with a partner)*

→ *Travelling with friends more common amongst younger tourists (28% aged 15-24, 18% aged 25-39, 13% aged 40-54 and 12% aged 55+ travelled with a friend)*

Accompanied travel on holidays of 5+ days in 2016 *(ReiseAnalyse)*

- 11% travelled alone
- 47% travelled in a group of two
- 14% travelled in a group of three
- 17% travelled in a group of four
- 12% travelled in a group of five or more people

- Average number of people in a travelling group was 3.0

Length of stay

Outbound trips with 4 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	17,094,355	21%	39,661,532	6%
4 to 7 nights	30,686,363	38%	174,847,976	26%
8 to 14 nights	24,052,842	30%	270,845,925	40%
15+ nights	8,663,257	11%	196,949,588	29%

- Average length of holiday in 2016 was 12.6 days (ReiseAnalyse)

Domestic trips dominant for short holidays (2-4 days)

Short holiday trips (2-4 days) in 2016 *(ReiseAnalyse)*

- 75% domestic trips
- City breaks most popular
- Hotel accommodation dominant

Outbound trips dominant for longer holidays (5+ days)

Holiday of 5+ days in 2016 *(ReiseAnalyse)*

- 70% outbound trips

Type of accommodation

Hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	62,544,567	77%
Hotels or similar establishments	42,865,425	53%
Campsites, caravan or trailer park	3,961,573	5%
Other rented accommodation	15,717,568	19%
Total of non-rented accommodation	18,172,379	23%
Own holiday home	4,751,531	6%
Staying at relatives or friends	11,773,962	15%
Other non-rented accommodation	1,646,885	2%
TOTAL	80,716,945	100%

Short breaks – outbound holiday trips of 2-4 days in 2016 by type of accommodation *(ReiseAnalyse)*

Type of accommodation	City breaks	Destinations outside cities
Hotel/guesthouse	76%	62%
Holiday apartment/home	8%	13%
Camping	1%	7%
Family or friends	6%	12%
Other	8%	8%

Outbound holiday trips of 5+ days in 2016 by type of accommodation *(ReiseAnalyse)*

Type of accommodation	Total outbound	Mediterranean
Hotel/guesthouse	59%	68%
Holiday apartment/home	20%	17%
Camping	5%	3%
Family or friends	11%	10%
Other	5%	3%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	533,761,539	75%
Hotels or similar establishments	334,138,840	47%
Campsites, caravan or trailer park	45,702,983	6%
Other rented accommodation	153,919,717	22%
Total of non-rented accommodation	176,253,926	25%
Own holiday home	54,113,718	8%
Staying at relatives or friends	104,714,549	15%
Other non-rented accommodation	17,425,658	2%
TOTAL	710,015,465	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 58% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 20% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 11% stayed with friends or relatives
- 7% went to a camp site
- 2% stayed at their own property or second home
- 1% used other type of accommodation

→ *Paid commercial accommodation more popular among older tourists (usually used by 51% of those younger than 25 years of age compared to 67% of tourists older than 54 years of age)*

→ *Paid but private accommodation more popular among younger tourists (usually used by 21% of those younger than 25 years of age compared to 13% of tourists older than 54 years of age)*

Mode of transport

Car is the most important mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	30,642,414	38%
Land	47,618,011	59%
Motor vehicle	35,845,821	44%
Bus, coach	6,381,455	8%
Railways	3,911,424	5%
Other	1,479,312	2%
Waterway	2,456,521	3%
TOTAL	80,716,945	100%

Air travel most often used for international city breaks

Short breaks – mode of transport used for outbound holiday trips of 2-4 days in 2016 *(ReiseAnalyse)*

Mode of transport	City breaks	Destinations outside cities
Aircraft	52%	19%
Car/mobile home	23%	64%
Bus	12%	8%
Train	11%	7%
Other	2%	2%

Air travel dominates in longer outbound holiday trips (5+ days), especially to Mediterranean

Mode of transport used for outbound holiday trips of 5+ days in 2016 *(ReiseAnalyse)*

Mode of transport	Total outbound	Mediterranean
Aircraft	55%	75%
Car/mobile home	34%	20%
Bus	6%	3%
Ferry/cruise ship	3%	2%
Train	2%	1%

Activities

On their holidays, German citizens usually go to excursions and shopping, enjoy local food and go swimming

Activities pursued on holidays in the past three years (2014-2016) *(ReiseAnalyse)*

General holiday activities

- 67% tried local specialities
- 41% rested and caught up on sleep
- 34% made holiday friends
- 20% played with children

Excursions and use of infrastructure

- 70% went on day trips, excursions
- 68% went shopping
- 39% visited cultural and historical sights/museums
- 35% visited natural attractions
- 13% visited theme parks/amusement parks
- 11% used health and spa facilities

Sport and activity

- 62% went swimming in a lake or the sea
- 44% used swimming pool
- 38% practiced gentle sport
- 35% went hiking or on walking tours
- 22% went cycling

Expenditures on outbound trips

German tourists on average spent 781 € per outbound trip made for personal purposes

German tourists on average spent 89 € per day on an outbound trip made for personal purposes

45 to 64 years old citizens are biggest spenders on outbound trips

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	781 €	274 €	344 €	163 €
Business	1379 €	787 €	436 €	156 €
TOTAL	848 €	332 €	354 €	162 €

Average expenditure per person per outbound holiday trip with 5+ days in 2016 *(ReiseAnalyse)*

- 1147 €
- 1091 € for Mediterranean region

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	89 €	31 €	39 €	19 €
Business	232 €	132 €	73 €	26 €
TOTAL	100 €	39 €	42 €	19 €

(in %)

Purpose	Total	Transport	Accommo-dation	Other
Personal	100%	35%	44%	21%
Business	100%	57%	32%	11%
TOTAL	100%	39%	42%	19%

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	7,035,089	11%
25 to 34	10,935,087	17%
35 to 44	7,425,216	12%
45 to 64	22,995,403	36%
65 and over	14,617,916	23%
TOTAL	63,008,711	100%

IRELAND

Holiday/destination research and choice

Participation in tourism

415,623 Irish citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

Every third outbound traveller is 45 to 64 years old

82% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	84,020	20%
25 to 34	66,903	16%
35 to 44	79,816	19%
45 to 64	131,369	32%
65 and over	53,515	13%
TOTAL	415,623	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (18%)
- Once (12%)
- Twice (18%)
- 3 times (14%)
- 4 or 5 times (16%)
- 6 to 10 times (13%)
- More than 10 times (9%)

Outbound trips

Irish citizens made a total of 6,403,485 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Holidays, leisure and recreation dominant motives for outbound trips

United Kingdom and Spain top outbound destinations

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	5,511,810	86%
Holidays, leisure and recreation	3,387,887	53%
Visits to friends and relatives	1,447,223	23%
Other (e.g. pilgrimage, health treatment)	676,700	11%
Professional, business	891,675	14%
TOTAL	6,403,485	100%

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
United Kingdom	2,102,421	33%	1,703,021	31%
Spain	1,269,474	20%	1,245,564	23%
France	482,776	8%	447,044	8%
United States	404,133	6%	312,340	6%
Portugal	374,693	6%	366,662	7%
Italy	290,712	5%	261,629	5%
Germany	206,631	3%	148,357	3%
Netherlands	141,999	2%	120,855	3%

Poland	101,771	2%	86,313	2%
Australia	61,854	1%	57,055	1%
Austria	56,792	1%	50,044	1%
Greece	44,950	1%	41,789	1%
Other countries	865,279	14%	671,137	12%
TOTAL	6,403,485	100%	5,511,810	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Ireland (26%)
- Spain (19%)
- United Kingdom (10%)
- Portugal (9%)
- Italy (6%)
- France (5%)
- Other EU28 (25%)
- Outside the EU28 (15%)

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Cities most popular type of destination

Type of destination	N	%
City	3,525,271	64%
Countryside	681,396	12%
Seaside	2,082,935	38%
Cruise ship	64,489	1%
Mountains	402,738	7%
Other	247,174	4%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	711,871	13%
25 to 34	957,350	17%
35 to 44	1,233,513	22%
45 to 64	1,891,888	34%
65 and over	717,189	13%
TOTAL	5,511,810	100%

Overnights on outbound trips

59% of outbound overnights realized on holiday/leisure trips

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	42,610,493	91%
Holidays, leisure and recreation	27,560,578	59%
Visits to friends and relatives	9,626,267	21%
Other (e.g. pilgrimage, health treatment)	5,423,648	12%
Professional, business	3,993,790	9%
TOTAL	46,604,283	100%

Spain, United Kingdom and United States top outbound destinations in realized overnights

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	11,850,921	25%	11,758,254	28%
United Kingdom	7,574,005	16%	6,560,159	15%
United States	4,783,689	10%	4,091,339	10%
France	4,014,821	9%	3,887,330	9%
Portugal	2,988,506	6%	2,957,122	7%
Italy	2,215,009	5%	2,103,560	5%
Australia	1,405,728	3%	1,355,402	3%
Germany	1,002,139	2%	781,791	2%
Canada	817,831	2%	719,178	2%
Poland	641,307	1%	576,120	1%
Netherlands	604,784	1%	544,354	1%
Greece	415,209	1%	388,868	1%
Other countries	8,290,334	18%	6,887,016	16%
TOTAL	46,604,283	100%	42,610,493	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	23,776,692	56%
Countryside	7,163,837	17%
Seaside	20,859,744	49%
Cruise ship	733,898	2%
Mountains	4,635,763	11%
Other	2,500,521	6%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	6,705,997	16%
25 to 34	6,304,490	15%
35 to 44	8,559,923	20%
45 to 64	14,108,107	33%
65 and over	6,931,977	16%
TOTAL	42,610,493	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach holiday and visiting friends and relatives the main reasons for going on holiday

- Sun/beach (29%)
- Visiting family/friends/relatives (VFR) (24%)
- City trips (11%)
- Nature (7%)
- Culture (6%)
- Specific events (sporting events/festivals) (6%)

- Wellness/Spa/health treatment (2%)
- Sport-related activities (5%)
- Other reason (8%)

→ *Younger tourists more motivated by city trips (17%) compared to other age groups*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and cultural, historical attractions, activities/ services available and quality of accommodation the most important factors in staying loyal to the destination

- Natural features (21%)
- Cultural and historical attractions (18%)
- Activities/services available (17%)
- Quality of the accommodation (16%)
- General level of prices (10%)
- How tourists are welcomed (7%)
- Accessible facilities for people with special needs (3%)
- Other reasons (4%)
- 1% don't go back to the same place

→ *Activities/services available are more important for loyalty of tourists younger than 25 years of age (28%) compared to older tourists, especially those older than 54 years of age (10%)*

Environmentally-friendly factors

Approximately every second tourist was influenced by sustain-able/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 20% the accessibility of a destination by a means of environmentally-friendly transport
- 20% the introduction of sustainable/environmentally-friendly practices in the destination
- 20% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 14% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 47% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

Information sources

Recommendations, websites and personal experience the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (54%)
- Websites (49%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (40%)

  - Websites run by service provider or by destination (15%)
- Personal experience (30%)
- Social media pages (16%)
- Newspaper, radio or TV (10%)
- Counters of travel agencies and tourism offices (9%)
- Paid for guidebooks and magazines (8%)

→ *Social media pages more important for younger tourists (for 34% aged 15-24, 20% aged 25-39, 11% aged 40-54 and 7% aged 55+)*

→ *Websites more important for younger tourists (for 58% aged 15-24, 61% aged 25-39, 47% aged 40-54 and 34% aged 55+)*

Booking/transaction behaviors

Holiday organization

Every fifth outbound trip organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	998,159	19%
Non-package travel	4,200,761	81%
TOTAL	5,198,919	100%

Booking

Online commercial services most popular for booking

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 65% used online commercial services
  - 17% used online commercial services listing private housing offers from individuals
  - 55% used other online commercial services (tour operators, airline companies, etc.)
- 17% over the phone
- 11% over the counter at a travel agency
- 9% through someone they know
- 5% on-site (place of holidays)
- 4% over the counter of a transportation country
- 4% used other method(s)
- 3% did not book anything

→ *22% of those older than 54 years of age booked their holiday over the phone, compared to 7% of those younger than 25 years of age*

→ *19% of those younger than 25 years of age booked their holiday through someone they know, compared to 10% of those older than 54 years of age*

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	848,360	16%
Booking of the main means of accommodation via tour operator or travel agency	957,525	18%
Internet booking of the main means of transport	3,639,996	70%
Internet booking of the main means of accommodation	2,023,313	39%
Booking of the trip independent: direct booking with the service provider	3,741,042	72%
Booking of the trip independent: no booking was needed	228,052	4%

Tourist services are most often purchased separately

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 13% usually went on an all-inclusive holiday
- 20% usually booked other types of package travel (not all-inclusive)
- 58% usually purchased tourist services separately

Planning/itinerary behaviors

Travel party

Partners are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 34% travelled with a partner
- 33% travelled with family members (including children)
- 17% travelled with friends
- 13% travelled with family members (adults only)
- 7% travelled alone
- 5% travelled with an organized group

→ *Travelling with a partner more common amongst older tourists (14% aged 15-24, 31% aged 25-39, 31% aged 40-54 and 50% aged 55+ travelled with a partner)*

→ *Travelling with friends more common amongst younger tourists (26% aged 15-24, 22% aged 25-39, 12% aged 40-54 and 12% aged 55+ travelled with a friend)*

Length of stay

Outbound trips with 4 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	1,554,888	28%	3,399,831	%
4 to 7 nights	2,142,042	39%	12,135,848	29%
8 to 14 nights	1,279,392	23%	13,655,816	32%
15+ nights	531,776	10%	13,048,061	31%

Type of accommodation

Hotel accommodation most popular

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	3,879,695	70%
Hotels or similar establishments	2,489,221	45%
Campsites, caravan or trailer park	144,418	3%
Other rented accommodation	1,246,056	23%
Total of non-rented accommodation	1,632,114	30%
Own holiday home	124,421	2%
Staying at relatives or friends	1,466,419	27%
Other non-rented accommodation	41,274	1%
TOTAL	5,511,810	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	28,843,995	68%
Hotels or similar establishments	14,992,472	35%
Campsites, caravan or trailer park	1,399,096	3%
Other rented accommodation	12,452,427	29%
Total of non-rented accommodation	13,766,498	32%
Own holiday home	1,897,534	4%
Staying at relatives or friends	11,053,849	26%
Other non-rented accommodation	815,115	2%
TOTAL	42,610,493	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 55% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 19% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 17% stayed with friends or relatives
- 7% went to a camp site
- 4% stayed at their own property or second home
- 1% used other type of accommodation

→ *Paid commercial accommodation more popular among older tourists (usually used by 48% of those younger than 25 years of age compared to 59% of tourists older than 54 years of age)*

Mode of transport

Air travel is the dominant mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	4,851,019	88%
Land	395,216	7%
Motor vehicle	343,406	6%
Bus, coach	-	-
Railways	36,684	1%
Other	-	-
Waterway	265,574	5%
TOTAL	5,511,810	100%

Expenditures on outbound trips

Irish tourists on average spent 823 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	823 €	270 €	248 €	304 €
Business	1209 €	478 €	396 €	334 €
TOTAL	877 €	299 €	269 €	309 €

Irish tourists on average spent 106 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	106 €	35 €	32 €	40 €
Business	270 €	107 €	88 €	75 €
TOTAL	120 €	40 €	37 €	42 €

(in %)

Purpose	Total	Transport	Accommo-dation	Other
Personal	100%	33%	30%	37%
Business	100%	39%	32%	29%
TOTAL	100%	33%	30%	37%

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

45 to 64 years old citizens are biggest spenders on outbound trips

(in 000 €)

Age (years)	N	%
15 to 24	631,155	14%
25 to 34	770,268	17%
35 to 44	933,334	21%
45 to 64	1,582,048	35%
65 and over	618,217	14%
TOTAL	4,535,022	100%

ITALY

Holiday/destination research and choice

Participation in tourism

3,362,741 Italian citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

The dominant group in outbound travel are tourists from 45 to 64

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	623,894	19%
25 to 34	712,445	21%
35 to 44	550,812	16%
45 to 64	1,133,142	34%
65 and over	342,448	10%
TOTAL	3,362,741	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (31%)
- Once (16%)
- Twice (14%)
- 3 times (12%)
- 4 or 5 times (12%)
- 6 to 10 times (10%)
- More than 10 times (6%)

→ *Those older than 54 years of age did not travel at all more often (42%) compared to those younger than 25 (19%)*

Outbound trips

Italian citizens made a total of 10,448,557 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Holidays, leisure and recreation dominant motives for outbound trips

France, Spain and USA top outbound destinations

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	8,809,882	84%
Holidays, leisure and recreation	5,419,894	52%
Visits to friends and relatives	3,144,136	30%
Professional, business	1,638,675	16%
TOTAL	10,448,557	100%

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
France	1,382,404	13%	1,171,864	13%
Spain	1,196,653	11%	1,083,376	12%
United States	1,006,537	10%	928,894	11%
Germany	807,608	8%	522,335	6%
Austria	692,165	7%	614,684	7%
United Kingdom	657,413	6%	426,916	5%
Other countries	4,705,777	45%	4,061,813	46%
TOTAL	10,448,557	100%	8,809,882	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Italy (68%)
- France (5%)
- Spain (4%)
- Greece (2%)
- Croatia (2%)
- United Kingdom (2%)
- USA (2%)
- In EU28 (23%)
- Outside the EU28 (8%)

Cities most popular type of destination

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	3,504,010	40%
Countryside	341,503	4%
Seaside	2,105,613	24%
Cruise ship	-	-
Mountains	915,520	10%
Other	290,995	3%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,354,721	15%
25 to 34	1,285,138	15%
35 to 44	2,594,536	29%
45 to 64	2,502,735	28%
65 and over	1,072,752	12%
TOTAL	8,809,882	100%

Overnights on outbound trips

47% of outbound overnights realized on holiday/leisure trips

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	65,582,341	85%
Holidays, leisure and recreation	36,233,337	47%
Visits to friends and relatives	27,531,249	36%
Professional, business	11,551,276	15%
TOTAL	77,133,618	100%

United States, France and Spain top destinations in outbound overnights

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
United States	10,171,782	13%	9,057,620	14%
France	7,758,034	10%	7,386,048	11%
Spain	7,448,883	10%	7,072,017	11%
Austria	3,926,732	5%	3,220,994	5%
United Kingdom	3,702,499	5%	2,467,186	4%
Croatia	3,365,198	4%	3,365,198	5%
Germany	2,788,203	4%	1,972,842	3%
Other countries	37,972,287	49%	31,040,436	47%
TOTAL	77,133,618	100%	65,582,341	100%

Most overnights realized in cities

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*

Multiple response.

Type of destination	N	%
City	22,959,745	35%
Countryside	2,982,486	5%
Seaside	15,714,825	24%
Cruise ship	-	-
Mountains	7,308,064	11%
Other	2,958,331	5%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	12,625,888	19%
25 to 34	11,610,382	18%
35 to 44	17,165,327	26%
45 to 64	17,392,876	27%
65 and over	6,787,868	10%
TOTAL	65,582,341	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach most often cited as the main reason for going on holiday

- Sun/beach (25%)
- Visiting family/friends/relatives (VFR) (18%)
- City trips (17%)
- Culture (14%)
- Wellness/Spa/health treatment (9%)
- Nature (7%)
- Sport-related activities (1%)
- Specific events (sporting events/festivals) (5%)
- Other reason (4%)

→ *Sun & beach more important for those from 25 to 39 years of age (28%) compared to those older than 54 (19%).*

→ *VFR is more frequently outlined as the main reason for going on holiday by those older than 54 years of age (26%) compared to tourists younger than 25 (11%).*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and cultural and historical attractions are the main factors in staying loyal to the destination

- Natural features (21%)
- Cultural and historical attractions (14%)
- Quality of the accommodation (9%)
- How tourists are welcomed (9%)
- General level of prices (7%)
- The activities/services available (5%)
- Accessible facilities for people with special needs (1%)
- Other reasons (6%)
- 22% don't go back to the same place

→ *Cultural and historical attractions are more important for loyalty of tourists younger than 25 years of age (20%) compared to those older than 54 years of age (14%)*

→ *Loyality to a destination decreases with age (14% of those aged 15-24, 15% of those aged 25-39, 24% of those aged 40-54 and 27% of those aged 55+ do not return to the same destination)*

Environmentally-friendly factors

40% of tourist are influenced by sustainable/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 12% the introduction of sustainable/environmentally-friendly practices in the destination
- 12% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 11% the accessibility of a destination by a means of environmentally-friendly transport
- 8% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 59% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

→ *57% of those younger than 25 years of age were not influenced by any of the above factors when choosing the destination, compared to 69% of those in age group from 25-39*

Information sources

Websites are the most important source of information, followed by recommendations of friends, colleagues or relatives

Websites as a source for getting information about the destinations are more popular with younger generations of tourists

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Websites (43%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (35%)
  - Websites run by service provider or by destination (16%)
- Recommendations of friends, colleagues or relatives (34%)
- Personal experience (23%)
- Counters of travel agencies and tourism offices (21%)
- Newspaper, radio or TV (8%)
- Social media pages (8%)
- Paid for guidebooks and magazines (5%)

→ *Usage of websites for getting information about destinations is decreasing with age of tourists (69% of those younger than 25 use it, 58% of tourists from 25-39 of age use it, 49% of tourists from 40-54 of age use it and 23% of tourists older than 54 use it)*

Market segments *(HTZ: GfK Sinottica 2016)*

Friends segment (aged 18 to 29) interested in value for money and adventure, use online sources to organize travel

Friends (18 to 29 years of age)

- Neither early planners nor frequent travellers
- 57% earns average household income
- Look for the best value for money and adventure
- 89% looks for info online to organize their travel
- 88% do not refer to travel agencies to get info on holiday
- 54% likes adventurous travel

Families segment (aged 35 to 64) interested in gastronomy and culture, use online sources and travel agencies to organize travel

Families (35 to 64 years of age)

- Frequent travellers
- 55% earns higher than average household income
- Interested in gastronomy and cultural events
- 83% looks for info online to organize their travel
- 32% refers to travel agencies to organize holiday
- 14% bought travels/trips online
- 67% primarily attracted by culture
- 23% primarily attracted by nature, away from noise and confusion

Booking/transaction behaviors

Holiday organization

18% of outbound trips organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	1,730,592	18%
Non-package travel	7,927,680	82%
TOTAL	9,658,271	100%

Booking

Online commercial services used for booking by every second outbound tourist

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 49% used online commercial services
  - 33% used online commercial services listing private housing offers from individuals
  - 22% used other online commercial services (tour operators, airline companies, etc.)
- 15% over the counter at a travel agency

- 13% through someone they know
- 11% used other method(s)
- 10% over the phone
- 10% did not book anything
- 6% on-site (place of holidays)
- 5% over the counter of a transportation company (airline company, railway company, etc.)

→ *Online commercial services are used less often (32%) by older tourists (55+) compared to other age groups*

→ *15% of those younger than 25 years of age booked their holiday over the counter at a travel agency, compared to 24% of those older than 54 years of age*

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	2,537,820	13%
Booking of the main means of accommodation via tour operator or travel agency	2,145,583	11%
Internet booking of the main means of transport	4,218,747	22%
Internet booking of the main means of accommodation	3,678,652	19%
Booking of the trip independent: direct booking with the service provider	5,738,752	30%
Booking of the trip independent: no booking was needed	1,033,013	5%

Italian tourists usually do not spend their holidays in all-inclusive arrangements

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 22% usually went on an all-inclusive holiday
- 21% usually booked other types of package travel (not all-inclusive)
- 43% usually purchased tourist services separately

Planning/itinerary behaviors

Travel party

Italian tourists usually travel in couples or with family

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 29% travelled with a partner
- 28% travelled with family members (including children)
- 22% travelled with friends
- 15% travelled with family members (adults only)
- 10% travelled alone

- 5% travelled with an organized group

→ *Travelling with a partner is increasing with age (11% aged 15-24, 25% aged 25-39, 25% aged 40-54 and 45% aged 55+ travelled with a partner)*

→ *Travelling with friends more common amongst younger tourists (47% aged 15-24, 25% aged 25-39, 11% aged 40-54 and 16% aged 55+ travelled with a friend)*

Length of stay

Outbound trips with 4 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	2,467,363	28%	5,980,802	10%
4 to 7 nights	3,304,107	38%	18,777,751	31%
8 to 14 nights	2,259,141	26%	23,241,124	39%
15+ nights	686,945	8%	12,109,454	20%

Type of accommodation

Hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	5,594,444	64%
Hotels or similar establishments	3,571,112	41%
Campsites, caravan or trailer park	-	-
Other rented accommodation	1,858,132	21%
Total of non-rented accommodation	3,215,438	36%
Own holiday home	-	-
Staying at relatives or friends	2,714,848	31%
Other non-rented accommodation	-	-
TOTAL	8,809,882	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	35,592,982	54%
Hotels or similar establishments	18,358,339	28%
Campsites, caravan or trailer park	-	-
Other rented accommodation	15,458,107	24%
Total of non-rented accommodation	29,989,360	46%
Own holiday home	-	-
Staying at relatives or friends	26,507,369	40%
Other non-rented accommodation	-	-
TOTAL	65,582,341	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 57% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 18% stayed with friends or relatives
- 10% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 5% went to a camp site
- 9% stayed at their own property or second home

→ *Paid commercial accommodation more popular among older tourists (usually used by 47% of those younger than 25 years of age compared to 62% of tourists older than 54 years of age)*

Mode of transport

Plane is the most important mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	5,650,689	64%
Land	3,005,633	34%
Motor vehicle	2,306,779	26%
Bus, coach	-	-
Railways	-	-
Other	-	-
Waterway	-	-
TOTAL	8,809,882	100%

Expenditures on outbound trips

Italian tourist on average spent 643 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	643 €	220 €	210 €	212 €
Business	702 €	297 €	249 €	155 €
TOTAL	652€	232 €	216 €	203 €

Italian tourist on average spent 86 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	86 €	29 €	28 €	28 €
Business	99 €	42 €	35 €	22 €
TOTAL	88 €	31 €	29 €	27 €

(in %)

Purpose	Total	Transport	Accommo-dation	Other
Personal	100%	34%	33%	33%
Business	100%	42%	36%	22%
TOTAL	100%	36%	33%	31%

35 to 64 years old citizens are biggest spenders on outbound trips

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	691,439	12%
25 to 34	964,693	17%
35 to 44	1,674,890	30%
45 to 64	1,643,735	29%
65 and over	692,458	12%
TOTAL	5,667,215	100%

POLAND

Holiday/destination research and choice

Participation in tourism

2,565,836 Polish citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

45 to 64 years of age is dominant group in outbound travel

72% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	420,412	16%
25 to 34	477,332	19%
35 to 44	445,653	17%
45 to 64	926,596	36%
65 and over	295,843	12%
TOTAL	2,565,836	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (26%)
- Once (9%)
- Twice (11%)
- 3 times (9%)
- 4 or 5 times (13%)
- 6 to 10 times (13%)
- More than 10 times (18%)

→ *84% of those younger than 25 years of age travelled at least once, compared to 60% of those older than 54 years of age*

Outbound trips

Polish citizens made a total of 11,286,503 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Holidays, leisure and recreation dominant motives for outbound trips

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	10,411,789	92%
Holidays, leisure and recreation	6,344,515	56%
Visits to friends and relatives	3,511,432	31%
Other (e.g. pilgrimage, health treatment)	555,842	5%
Professional, business	874,714	8%
TOTAL	11,286,503	100%

Germany is the top outbound destination

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Germany	2,310,056	20%	2,013,600	19%
Italy	936,111	8%	900,371	9%
United Kingdom	915,284	8%	863,639	8%
Croatia	661.303	6%	657,981	6%
Czech Republic	654,987	6%	606,931	6%
Greece	611,649	5%	603,687	6%
Spain	587,648	5%	567,046	5%
Austria	402,826	4%	376,420	4%
Slovakia	376,408	3%	367,100	4%
France	367,657	3%	307,700	3%
Sweden	274,617	2%	249,851	2%
Hungary	258,116	2%	241,160	2%
Other countries	2,930,021	26%	2,656,303	26%
TOTAL	11,286,503	100%	10,411,789	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Poland (57%)
- Italy (6%)
- Croatia (4%)
- Germany (4%)
- Greece (4%)
- Spain (3%)
- Other EU28 (33%)
- Outside the EU28 (9%)

→ *Age not a relevant factor in choosing the destination*

Cities most popular type of destination

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*

Multiple response.

Type of destination	N	%
City	8,067,668	77%
Countryside	649,847	6%
Seaside	3,049,875	29%
Cruise ship	163,600	2%
Mountains	1,091,956	10%
Other	172,347	2%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,457,308	14%
25 to 34	2,058,802	20%
35 to 44	2,230,947	21%
45 to 64	3,448,844	33%
65 and over	1,215,887	12%
TOTAL	10,411,789	100%

Overnights on outbound trips

Every second outbound overnight realized on holiday/leisure trips

Germany, United Kingdom and Italy top outbound destinations in realized overnights

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	97,619,379	93%
Holidays, leisure and recreation	51,324,737	49%
Visits to friends and relatives	40,928,532	39%
Other (e.g. pilgrimage, health treatment)	5,366,110	5%
Professional, business	7,820,325	7%
TOTAL	105,439,704	100%

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Germany	20,388,734	19%	18,212,212	19%
United Kingdom	11,530,739	11%	10,514,241	11%
Italy	8,231,750	8%	8,065,591	8%
Croatia	6,154,777	6%	6,134,219	6%
Spain	5,636,365	5%	5,428,939	6%
Greece	5,238,435	5%	5,191,886	5%
United States	4,181,628	4%	3,756,459	4%
France	3,521,952	3%	2,964,886	3%
Ireland	2,901,166	3%	2,856,406	3%
Austria	2,844,518	3%	2,707,326	3%
Czech Republic	2,785,481	3%	2,557,467	3%
Sweden	2,687,077	3%	2,484,669	3%
Norway	2,682,156	3%	2,442,180	3%
Other countries	26,654,926	25%	24,302,898	25%
TOTAL	105,439,704	100%	97,619,379	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	76,513,564	78%
Countryside	6,618,440	7%
Seaside	29,823,433	31%
Cruise ship	1,413,230	1%
Mountains	9,983,449	10%
Other	1,590,040	2%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	12,716,802	13%
25 to 34	17,312,541	18%
35 to 44	18,686,613	19%
45 to 64	33,899,844	35%
65 and over	15,003,578	15%
TOTAL	97,619,379	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach and visiting friends and relatives the main reasons for going on holiday

- Sun/beach (24%)
- Visiting family/friends/relatives (VFR) (24%)
- Nature (19%)
- City trips (11%)
- Sport-related activities (6%)
- Culture (5%)
- Wellness/Spa/health treatment (4%)
- Specific events (sporting events/festivals) (3%)
- Other reason (6%)

→ *Wellness/Spa/health treatment most important for 55+ years of age (11%)*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features the main factor in staying loyal to the destination

- Natural features (34%)
- General level of prices (12%)
- Quality of the accommodation (11%)
- Cultural and historical attractions (11%)
- How tourists are welcomed (8%)
- Activities/services available (5%)
- Accessible facilities for people with special needs (4%)
- Other reasons (4%)
- 3% don't go back to the same place

→ *The quality of the accommodation less important with age (19% for 15-24, 11% for 25-39, 11% for 40-54 and 7% for 55+ years of age)*

→ *Cultural and historical attractions are more important for loyalty of tourists younger than 25 years of age (18%) compared to those older (10%)*

Environmentally-friendly factors

Almost every second tourist was influenced by sustainable/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 22% the introduction of sustainable/environmentally-friendly practices in the destination
- 13% the accessibility of a destination by a means of environmentally-friendly transport
- 11% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 8% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 55% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

Information sources

Recommendations, websites and personal experience the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (61%)
- Websites (47%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (36%)
  - Websites run by service provider or by destination (17%)
- Personal experience (30%)
- Social media pages (17%)
- Newspaper, radio or TV (14%)
- Counters of travel agencies and tourism offices (10%)
- Paid for guidebooks and magazines (5%)

→ *Recommendations of friends, colleagues or relatives more important for middle-aged tourists (for 59% aged 15-24, 70% aged 25-39, 65% aged 40-54 and 50% aged 55+)*
→ *Websites more important for younger tourists (for 57% aged 15-24 and 27% aged 55+)*

Booking/transaction behaviors

Holiday organization

Every fourth outbound trip organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	2,345,520	25%
Non-package travel	7,130,397	75%
TOTAL	9,475,917	100%

Booking

Online commercial services most popular for booking

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 46% used online commercial services
  - 35% used online commercial services listing private housing offers from individuals
  - 19% used other online commercial services (tour operators, airline companies, etc.)
- 24% over the phone
- 21% through someone they know
- 17% did not book anything
- 13% on-site (place of holidays)
- 10% over the counter at a travel agency
- 8% over the counter of a transportation company
- 3% used other method(s)

→ *Online commercial services are used less often (23%) by older tourists (55+) compared to other age groups*

→ *15% of those younger than 25 years of age booked their holiday over the counter of a transportation company, compared to 6% of those older than 54 years of age*

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	2,541,084	27%
Booking of the main means of accommodation via tour operator or travel agency	2,596,372	27%
Internet booking of the main means of transport	1,661,455	18%
Internet booking of the main means of accommodation	1,590,544	17%
Booking of the trip independent: direct booking with the service provider	2,635,186	28%
Booking of the trip independent: no booking was needed	4,143,842	44%

Tourist services are most often purchased separately

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 51% usually purchased tourist services separately
- 19% usually went on an all-inclusive holiday
- 14% usually booked other types of package travel (not all-inclusive)

→ *56% of those younger than 25 years of age purchased tourist services separately, compared to 40% of those older than 54 years of age*

Planning/itinerary behaviors

Travel party

Partners and family members are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 36% travelled with a partner
- 32% travelled with family members (including children)
- 20% travelled with friends
- 16% travelled with family members (adults only)
- 8% travelled alone
- 5% travelled with an organized group

→ *Travelling alone more common amongst younger tourists (5% aged 15-24, 5% aged 25-39, 3% aged 40-54 and 17% aged 55+)*

→ *Travelling with friend(s) more common amongst younger tourists (39% aged 15-24, 29% aged 25-39, 12% aged 40-54 and 14% aged 55+)*

→ *Travelling with partner more common amongst older tourists (26% aged 15-24, 36% aged 25-39, 32% aged 40-54 and 40% aged 55+)*

Length of stay

Outbound trips with 1 to 3 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	1,845,190	18%	4,267,189	4%
4 to 7 nights	4,614,535	44%	26,542,343	27%
8 to 14 nights	2,915,158	28%	32,198,669	33%
15+ nights	1,036,906	10%	34,611,177	35%

Type of accommodation

Hotel accommodation and staying at relatives or friends most popular

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	6,333,488	61%
Hotels or similar establishments	4,829,508	46%
Campsites, caravan or trailer park	193,422	2%
Other rented accommodation	1,310,558	13%
Total of non-rented accommodation	4,078,301	39%
Own holiday home	55,649	1%
Staying at relatives or friends	3,984,555	38%
Other non-rented accommodation	38,097	0%
TOTAL	10,411,789	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	51,570,205	53%
Hotels or similar establishments	35,770,165	37%
Campsites, caravan or trailer park	1,435,861	1%
Other rented accommodation	14,364,179	15%
Total of non-rented accommodation	46,049,174	47%
Own holiday home	778,522	1%
Staying at relatives or friends	44,957,227	46%
Other non-rented accommodation	313,425	0%
TOTAL	97,619,379	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 43% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 25% stayed with friends or relatives
- 21% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 5% went to a camp site
- 5% stayed at their own property or second home

→ *Staying with friends or relatives more popular among older tourists (usually used by 24% of those younger than 25 years of age compared to 34% of tourists older than 54 years of age)*

Mode of transport

Air travel was used for almost every second outbound holiday trip, and car for every third

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	5,016,633	48%
Land	5,225,158	50%
Motor vehicle	3,467,658	33%
Bus, coach	1,582,060	15%
Railways	161,063	2%
Other	14,376	0%
Waterway	169,998	2%
TOTAL	10,411,789	100%

Expenditures on outbound trips

Polish tourists on average spent 494 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafes	Other
Personal	494 €	160 €	133 €	108 €	92 €
Business	684 €	235 €	214 €	144 €	91 €
TOTAL	509 €	166 €	139 €	111 €	92 €

Polish tourists on average spent 52 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafes	Other
Personal	53 €	17 €	14 €	12 €	10 €
Business	77 €	26 €	24 €	16 €	10 €
TOTAL	54 €	18 €	15 €	12 €	10 €

(in %)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafes	Other
Personal	100%	32%	27%	22%	19%
Business	100%	34%	31%	21%	13%
TOTAL	100%	33%	27%	22%	18%

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

45 to 64 years old citizens are biggest spenders on outbound trips

(in 000 €)

Age (years)	N	%
15 to 24	568,401	11%
25 to 34	1,160,628	23%
35 to 44	1,108,011	22%
45 to 64	10,746,713	34%
65 and over	561,643	11%
TOTAL	5,145,400	100%

SERBIA

Holiday/destination research and choice

Top outbound tourism destinations in 2016 *(UNWTO)*	
Bulgaria, Romania, Montenegro and Italy top outbound destinations	○ Bulgaria ○ Romania ○ Montenegro ○ Italy ○ Croatia ○ Turkey ○ Slovenia ○ Hungary ○ Bosnia and Herzegovina ○ Albania ○ Russian Federation ○ The Former Yugoslav Republic of Macedonia ○ Ukraine ○ United Kingdom ○ Slovakia

SLOVENIA

Holiday/destination research and choice

Participation in tourism

587,529 Slovenian citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

Every third outbound traveller is 45 to 64 years old

78% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	95,417	16%
25 to 34	114,306	19%
35 to 44	134,919	23%
45 to 64	192,680	33%
65 and over	50,207	9%
TOTAL	587,529	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (22%)
- Once (24%)
- Twice (9%)
- 3 times (12%)
- 4 or 5 times (16%)
- 6 to 10 times (9%)
- More than 10 times (9%)

Outbound trips

Slovenian citizens made a total of 2,853,252 outbound trips in 2016 *(for professional or personal purposes with at least one*

Holidays, leisure and recreation dominant motives for outbound trips

Croatia top outbound destination

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	2,436,538	85%
Holidays, leisure and recreation	2,041,928	72%
Visits to friends and relatives	353,271	12%
Other (e.g. pilgrimage, health treatment)	41,339	1%
Professional, business	416,713	15%
TOTAL	2,853,252	100%

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Croatia	1,660,200	58%	1,611,837	66%
Italy	151,689	5%	117,292	5%
Austria	149,018	5%	106,049	4%
Germany	102,824	4%	40,676	2%
Spain	61,916	2%	41,601	2%
France	53,931	2%	36,790	2%
Czech Republic	52,201	2%	29,468	1%
United Kingdom	34,769	1%	-	-
Hungary	34,664	1%	29,437	1%

Switzerland	29,962	1%	-	-
Greece	26,690	1%	25,859	1%
Other countries	496,388	17%	397,529	16%
TOTAL	2,853,252	100%	2,436,538	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Slovenia (19%)
- Croatia (55%)
- Italy (5%)
- Austria (3%)
- Greece (3%)
- Other EU28 (8%)
- Outside the EU28 (7%)

Seaside destinations most popular

Type of destination	N	%
City	903,467	37%
Countryside	289,669	12%
Seaside	1,666,851	68%
Cruise ship	-	-
Mountains	121,260	5%
Other	75,341	3%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	357,723	15%
25 to 34	448,905	18%
35 to 44	579,672	24%
45 to 64	835,063	34%
65 and over	215,175	9%
TOTAL	2,436,538	100%

Overnights on outbound trips

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

74% of outbound overnights realized on holiday/leisure trips

Purpose	N	%
Personal	14,869,864	91%
Holidays, leisure and recreation	12,109,757	74%
Visits to friends and relatives	2,301,327	14%
Other (e.g. pilgrimage, health treatment)	458,780	3%
Professional, business	1,444,091	9%
TOTAL	16,313,955	100%

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Croatia top outbound destination in realized overnights

Destination	Total trips		Personal trips	
	N	%	N	%
Croatia	9,238,003	57%	9,126,787	61%
Italy	641,228	4%	534,603	4%
Austria	424,739	3%	345,376	2%

Germany	423,014	3%	230,060	2%
Spain	422,481	3%	341,524	2%
France	351,347	2%	290,172	2%
Greece	207,519	1%	205,856	1%
United Kingdom	175,114	1%	-	-
Czech Republic	140,166	1%	81,477	1%
Hungary	101,816	1%	93,911	1%
Other countries	4,188,528	26%	3,620,098	24%
TOTAL	16,313,955	100%	14,869,864	100%

Most overnights realized in seaside destinations

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*

Multiple response.

Type of destination	N	%
City	5,403,119	36%
Countryside	2,293,283	15%
Seaside	10,522,321	71%
Cruise ship	-	-
Mountains	849,681	6%
Other	315,534	0

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	2,226,602	15%
25 to 34	2,652,804	18%
35 to 44	3,516,218	24%
45 to 64	4,811,716	32%
65 and over	1,662,524	11%
TOTAL	14,869,864	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach the main reason for going on holiday

- Sun/beach (52%)
- Visiting family/friends/relatives (VFR) (13%)
- Nature (7%)
- City trips (7%)
- Culture (6%)
- Wellness/Spa/health treatment (5%)
- Sport-related activities (3%)
- Specific events (sporting events/festivals) (2%)
- Other reason (5%)

→ *Culture less important with age (18% for 15-24, 6% for 25-39, 3% for 40-54 and 5% for 55+ years of age)*

→ *Wellness/Spa/health treatment most important for 55+ years of age (11%)*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Quality of the accommodation and natural features main factors in staying loyal to the destination

- Quality of the accommodation (24%)
- Natural features (18%)
- General level of prices (10%)
- Cultural and historical attractions (9%)
- Activities/services available (5%)
- How tourists are welcomed (5%)
- Accessible facilities for people with special needs (2%)
- Other reasons (9%)
- 10% don't go back to the same place

→ *The quality of the accommodation less important with age (36% for 15-24, 23% for 25-39, 27% for 40-54 and 20% for 55+ years of age)*

→ *Cultural and historical attractions are more important for loyalty of tourists younger than 25 years of age (14%) compared to those older than 54 years of age (7%)*

→ *Activities/services available are more important for loyalty of tourists younger than 25 years of age (22%) compared to older tourists (4%)*

Environmentally-friendly factors

Every third tourist was influenced by sustain-able/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 11% the accessibility of a destination by a means of environmentally-friendly transport
- 9% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 8% the introduction of sustainable/environmentally-friendly practices in the destination
- 7% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 67% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

Information sources

Personal experience, recommendations and websites the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Personal experience (41%)
- Recommendations of friends, colleagues or relatives (40%)
- Websites (31%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (21%)
  - Websites run by service provider or by destination (15%)
- Counters of travel agencies and tourism offices (13%)
- Paid for guidebooks and magazines (8%)
- Social media pages (8%)
- Newspaper, radio or TV (7%)

→ *Recommendations of friends, colleagues or relatives more important for younger tourists (for 71% aged 15-24, 47% aged 25-39, 23% aged 40-54 and 39% aged 55+)*

→ *Websites collecting and presenting comments, reviews and ratings from travellers more important for younger tourists (for 43% aged 15-24, 27% aged 25-39, 26% aged 40-54 and 7% aged 55+)*

→ *Counters of travel agencies and tourism offices more important for older tourists (for 7% aged 15-24, 10% aged 25-39, 10% aged 40-54 and 19% aged 55+)*

Booking/transaction behaviors

Holiday organization

Every tenth outbound trip organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	225,078	10%
Non-package travel	2,024,642	90%
TOTAL	2,249,720	100%

Booking

Online commercial services most popular for booking

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 29% used online commercial services
  - 19% used online commercial services listing private housing offers from individuals
  - 10% used other online commercial services (tour operators, airline companies, etc.)
- 20% over the counter at a travel agency
- 18% over the phone
- 12% through someone they know
- 9% on-site (place of holidays)
- 1% over the counter of a transportation company
- 3% used other method(s)
- 15% did not book anything

→ *Online commercial services are used less often (9%) by older tourists (55+) compared to other age groups*

→ *9% of those younger than 25 years of age booked their holiday over the counter at a travel agency, compared to 33% of those older than 54 years of age*

Most tourists usually book other types of package travel (not all-inclusive)

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	259,524	12%
Booking of the main means of accommodation via tour operator or travel agency	364,468	16%
Internet booking of the main means of transport	157,350	7%
Internet booking of the main means of accommodation	459,575	20%
Booking of the trip independent: direct booking with the service provider	1,023,409	45%
Booking of the trip independent: no booking was needed	840,617	37%

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 55% usually booked other types of package travel (not all-inclusive)
- 20% usually went on an all-inclusive holiday
- 20% usually purchased tourist services separately

Planning/itinerary behaviors

Travel party

Family members are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 36% travelled with family members (including children)
- 32% travelled with a partner
- 15% travelled with family members (adults only)
- 15% travelled with friends
- 7% travelled with an organized group
- 5% travelled alone

→ *Travelling with a partner more common amongst older tourists (18% aged 15-24, 20% aged 25-39, 32% aged 40-54 and 45% aged 55+ travelled with a partner)*

→ *Travelling with friends more common amongst younger tourists (45%), compared to other age groups*

Length of stay

Outbound trips with 1 to 3 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	1,067,855	44%	2,351,682	17%
4 to 7 nights	811,021	34%	4,598,058	34%
8 to 14 nights	438,575	18%	4,906,896	36%
15+ nights	94,240	4%	1,735,312	13%

Type of accommodation

24% of outbound tourists use hotel accommodation, 21% stay at relatives or friends

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	1,526,308	63%
Hotels or similar establishments	585,426	24%
Campsites, caravan or trailer park	300,567	12%
Other rented accommodation	640,316	26%
Total of non-rented accommodation	910,230	37%
Own holiday home	400,781	16%
Staying at relatives or friends	500,009	21%
Other non-rented accommodation	-	-
TOTAL	2,436,538	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	9,799,776	66%
Hotels or similar establishments	2,889,919	19%
Campsites, caravan or trailer park	2,167,070	15%
Other rented accommodation	4,742,787	32%
Total of non-rented accommodation	5,070,088	34%
Own holiday home	1,907,886	13%
Staying at relatives or friends	3.118,260	21%
Other non-rented accommodation	-	-
TOTAL	14,869,864	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 49% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 31% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 9% went to a camp site
- 7% stayed with friends or relatives
- 3% stayed at their own property or second home
- 1% used other type of accommodation

→ *Camping more popular among younger tourists (usually used by 14% of those younger than 25 years of age compared to 2% of tourists older than 54 years of age)*

Mode of transport

Car is dominant mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	244,903	10%
Land	2,183,549	90%
Motor vehicle	1,982,940	81%
Bus, coach	161,174	7%
Railways	36,193	1%
Other	-	-
Waterway	-	-
TOTAL	2,436,538	100%

Expenditures on outbound trips

Slovenian tourists on average spent 283 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafes	Other
Personal	283 €	80 €	101 €	47 €	56 €
Business	638 €	253 €	242 €	88 €	56 €
TOTAL	335 €	106 €	121 €	53 €	56 €

Slovenian tourists on average spent 46 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafes	Other
Personal	46 €	13 €	16 €	8 €	9 €
Business	184 €	73 €	70 €	25 €	16 €
TOTAL	59 €	19 €	21 €	9 €	10 €

(in %)

Purpose	Total	Transport	Accommo-dation	Restaurants/ cafes	Other
Personal	100%	28%	35%	17%	20%
Business	100%	40%	38%	13%	9%
TOTAL	100%	32%	35%	15%	18%

45 to 64 years old citizens are biggest spenders on outbound trips

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	106,221	15%
25 to 34	136,798	20%
35 to 44	156,586	23%
45 to 64	227,515	33%
65 and over	63,044	9%
TOTAL	690,167	100%

SPAIN

Holiday/destination research and choice

Participation in tourism

2,057,163 Spanish citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

Every third outbound traveller is 45 to 64 years old

68% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	349,216	17%
25 to 34	346,280	17%
35 to 44	479,966	23%
45 to 64	683,170	33%
65 and over	198,531	10%
TOTAL	2,057,163	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (31%)
- Once (14%)
- Twice (14%)
- 3 times (12%)
- 4 or 5 times (10%)
- 6 to 10 times (8%)
- More than 10 times (9%)

Outbound trips

Spanish citizens made a total of 13,272,399 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	11,691,070	88%
Holidays, leisure and recreation	7,787,826	59%
Visits to friends and relatives	3,281,978	25%
Other (e,g, pilgrimage, health treatment)	621,266	5%
Professional, business	1,581,329	12%
TOTAL	13,272,399	100%

Holidays, leisure and recreation dominant motives for outbound trips

France, Portugal, Italy and UK top outbound destinations

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
France	2,146,534	16%	1,860,918	16%
Portugal	1,650,105	12%	1,572,844	13%
Italy	1,450,755	11%	1,282,154	11%
United Kingdom	1,299,357	10%	1,170,766	10%
Germany	804,012	6%	626,657	5%
United States	425,465	3%	378,447	3%
Netherlands	302,343	2%	249,738	2%
Belgium	248,545	2%	186,778	2%
Romania	233,239	2%	233,239	2%
Switzerland	180,433	1%	167,454	1%
Poland	174,961	1%	162,481	1%
Ireland	162,135	1%	159,526	1%
Other countries	4,194,515	32%	3,640,068	31%
TOTAL	13,272,399	100%	11,691,070	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Spain (70%)
- France (5%)
- Italy (4%)
- Portugal (3%)
- Germany (2%)
- United Kingdom (2%)
- Other EU28 (21%)
- Outside the EU28 (9%)

Cities dominant type of holiday destinations

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response,

Type of destination	N	%
City	9,461,333	81%
Countryside	3,685,664	32%
Seaside	3,256,875	28%
Cruise ship	308,813	3%
Mountains	2,495,832	21%
Other	1,255,585	11%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,552,359	13%
25 to 34	2,528,743	22%
35 to 44	2,805,359	24%
45 to 64	3,822,373	33%
65 and over	982,236	8%
TOTAL	11,691,070	100%

Overnights on outbound trips

43% of outbound overnights realized on holiday/leisure trips and 42% on visits to friends and relatives

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	103,910,998	92%
Holidays, leisure and recreation	48,632,692	43%
Visits to friends and relatives	47,785,055	42%
Other (e,g, pilgrimage, health treatment)	7,493,250	7%
Professional, business	9,208,884	8%
TOTAL	113,119,882	100%

France, United Kingdom and Italy top destinations in outbound overnights

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
France	11,422,332	10%	10,438,892	10%
United Kingdom	8,780,033	8%	7,882,457	8%
Italy	8,570,402	8%	7,980,440	8%
Portugal	7,867,963	7%	7,723,010	7%
United States	5,335,152	5%	4,847,258	5%
Germany	5,217,067	5%	4,503,825	4%
Romania	4,297,117	4%	4,297,117	4%
Netherlands	1,793,750	2%	1,602,830	2%
Belgium	1,389,524	1%	1,253,270	1%
Ireland	1,354,879	1%	1,337,414	1%
Poland	1,332,333	1%	1,294,281	1%
Switzerland	1,188,904	1%	1,154,453	1%
Other countries	54,570,426	48%	49,595,751	48%
TOTAL	113,119,882	100%	103,910,998	100%

Most overnights realized in cities

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	81,519,246	78%
Countryside	36,193,640	35%
Seaside	33,527,880	32%
Cruise ship	2,456,000	2%
Mountains	24,689,548	24%
Other	15,598,204	15%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	14,946,568	14%
25 to 34	23,118,095	22%
35 to 44	23,660,194	23%
45 to 64	31,844,013	31%
65 and over	10,342,127	10%
TOTAL	103,910,998	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Visiting friends and relatives and sun & beach holiday are the main reasons for going on holiday

- Visiting family/friends/relatives (VFR) (27%)
- Sun/beach (24%)
- Culture (16%)
- Nature (10%)
- City trips (10%)
- Specific events (sporting events/festivals) (3%)
- Specific events (sporting events/festivals) (3%)
- Wellness/Spa/health treatment (2%)
- Sport-related activities (2%)
- Specific events (sporting events/festivals) (3%)
- Other reason (6%)

→ *Older tourists (55+) less motivated by sun & beach holiday (19%), but more with culture (21%) compared to other age groups*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and quality of the accommodation are the main factors in staying loyal to the destination

- Natural features (23%)
- Quality of the accommodation (19%)
- Cultural and historical attractions (14%)
- General level of prices (10%)
- Activities/services available (7%)
- How tourists are welcomed (7%)
- Accessible facilities for people with special needs (2%)
- Other reasons (8%)
- 2% don't go back to the same place

→ *Activities/services available are more important for loyalty of tourists younger than 25 years of age (12%) compared to older tourists, especially those older than 54 years of age (6%)*

Environmentally-friendly factors

46% of tourists were influenced by sustain-able/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 12% the accessibility of a destination by a means of environmentally-friendly transport
- 15% the introduction of sustainable/environmentally-friendly practices in the destination
- 12% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 7% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 54% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

Information sources

Recommendations and websites the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (56%)
- Websites (45%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (37%)
  - Websites run by service provider or by destination (13%)
- Personal experience (26%)
- Paid for guidebooks and magazines (6%)
- Counters of travel agencies and tourism offices (17%)
- Newspaper, radio or TV (7%)
- Social media pages (11%)

→ *Recommendations of friends, colleagues or relatives more important for younger tourists (for 64% aged 15-24, 63% aged 25-39, 62% aged 40-54 and 44% aged 55+)*

Market segments *(HTZ: EGM)*

Friends

- 18 to 29 years of age
- Love music, partying and fashion
- Usually buy tickets online
- Trips usually organized less than two weeks in advance
- Cities and beaches most popular as destinations
- 78% search for travel information online

Young couples with children

- 30 to 59 years of age
- Enjoy other cultures and gastronomy
- Usually plan their trips one month in advance
- Cities and beaches most popular as destinations
- 68% search for travel information online

Couples

- 40 to 54 years of age
- Like to travel to different places
- Interested in new cultures and new people, enjoy gastronomy
- Usually buy their tickets through the Internet

Older couples

- 50 to 64 years of age
- Usually plan their trips one month in advance
- Often look for information about trips in magazines
- 58% search for travel information online

Booking/transaction behaviors

Holiday organization

14% of outbound trips organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	1,197,604	14%
Non-package travel	7,493,326	86%
TOTAL	8,690,930	100%

Booking

Online commercial services most popular for booking

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 50% used online commercial services
  - 24% used online commercial services listing private housing offers from individuals
  - 31% used other online commercial services (tour operators, airline companies, etc,)
- 23% over the counter at a travel agency
- 10% through someone they know
- 9% over the phone
- 5% used other method(s)
- 4% on-site (place of holidays)
- 2% over the counter of a transportation company
- 13% did not book anything

→ *Online commercial services are used less often (37%) by older tourists (55+) compared to other age groups*

→ *10% of those younger than 25 years of age booked their holiday over the counter at a travel agency, compared to 37% of those older than 54 years of age*

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	1,664,940	12%
Booking of the main means of accommodation via tour operator or travel agency	1,491,902	11%
Internet booking of the main means of transport	2,054,331	15%
Internet booking of the main means of accommodation	1,771,180	13%
Booking of the trip independent: direct booking with the service provider	5,289,189	39%
Booking of the trip independent: no booking was needed	1,383,720	10%

Tourist services are most often purchased separately

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 22% usually went on an all-inclusive holiday
- 21% usually booked other types of package travel (not all-inclusive)
- 41% usually purchased tourist services separately

Planning/itinerary behaviors

Travel party

Partners and family members are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 6% travelled alone
- 36% travelled with a partner
- 17% travelled with family members (adults only)
- 34% travelled with family members (including children)
- 20% travelled with friends
- 4% travelled with an organized group

→ *Travelling with friends more common amongst younger tourists (30% aged 15-24, 23% aged 25-39, 11% aged 40-54 and 22% aged 55+ travelled with a friend)*

Length of stay

Outbound trips with 4 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	3,434,381	29%	7,808,029	8%
4 to 7 nights	4,276,781	37%	23,261,430	22%
8 to 14 nights	2,234,538	19%	23,383,914	23%
15+ nights	1,745,369	15%	49,457,625	48%

Type of accommodation

Hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	7,833,203	67%
Hotels or similar establishments	5,654,720	48%
Campsites, caravan or trailer park	237,553	2%
Other rented accommodation	1,940,931	17%
Total of non-rented accommodation	3,857,867	33%
Own holiday home	316,206	3%
Staying at relatives or friends	3,370,852	29%
Other non-rented accommodation	170,809	1%
TOTAL	11,691,070	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	50,265,848	48%
Hotels or similar establishments	33,492,379	32%
Campsites, caravan or trailer park	1,958,994	2%
Other rented accommodation	14,814,475	14%
Total of non-rented accommodation	53,645,149	52%
Own holiday home	3,792,652	4%
Staying at relatives or friends	48,351,953	47%
Other non-rented accommodation	1,500,545	1%
TOTAL	103,910,998	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 51% used paid commercial accommodation (e,g, hotel, hostel, etc,)
- 16% used paid but private accommodation (e,g, rented apartment, guest house, etc,)
- 20% stayed with friends or relatives
- 3% went to a camp site
- 9% stayed at their own property or second home
- 1% used other type of accommodation

→ *Paid commercial accommodation more popular among older tourists (usually used by 37% of those younger than 25 years of age compared to 69% of tourists older than 54 years of age)*
→ *Paid but private accommodation more popular among younger tourists (usually used by 24% of those younger than 25 years of age compared to 8% of tourists older than 54 years of age)*

Mode of transport

Plane is the most important mode of transport for outbound

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	7,559,496	65%
Land	3,761,379	32%
Motor vehicle	3,227,152	28%
Bus, coach	428,643	4%
Railways	98,654	1%
Other	-	-
Waterway	370,194	3%
TOTAL	11,691,070	100%

Expenditures on outbound trips

Spanish tourists on average spent 857 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Restaurants/ cafés	Accommo-dation	Other
Personal	857 €	292 €	170 €	217 €	176 €
Business	1257 €	568 €	178 €	437 €	71 €
TOTAL	905 €	326 €	171 €	244 €	164 €

Spanish tourists on average spent 96 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Restaurants/ cafés	Accommo-dation	Other
Personal	96 €	32 €	19 €	24 €	19 €
Business	215 €	98 €	31 €	75 €	12 €
TOTAL	106 €	38 €	20 €	28 €	19 €

(in %)

Purpose	Total	Transport	Restaurants/ cafés	Accommo-dation	Other
Personal	100%	36%	18%	27%	18%
Business	100%	46%	14%	35%	6%
TOTAL	100%	36%	19%	26%	18%

45 to 64 years old citizens are biggest spenders on outbound trips

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	1,260,404	13%
25 to 34	2,216,873	22%
35 to 44	2,325,431	23%
45 to 64	3,312,246	33%
65 and over	910,013	9%
TOTAL	10,024,968	100%

SWEDEN

Holiday/destination research and choice

Participation in tourism

1,741,260 Swedish citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

Every third outbound traveller is 45 to 64 years old

87% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	285,880	16%
25 to 34	297,331	17%
35 to 44	285,685	16%
45 to 64	565,632	32%
65 and over	306,732	18%
TOTAL	1,741,260	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (12%)
- Once (12%)
- Twice (9%)
- 3 times (11%)
- 4 or 5 times (19%)
- 6 to 10 times (20%)
- More than 10 times (16%)

Outbound trips

Swedish citizens made a total of 8,884,950 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Outbound trips with at least one overnight in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	8,249,385	89%
Holidays, leisure and recreation	6,203,829	71%
Visits to friends and relatives	1,359,157	15%
Other (e.g. pilgrimage, health treatment)	686,399	3%
Professional, business	635,564	11%
TOTAL	8,884,950	100%

Holidays, leisure and recreation dominant motives for outbound trips

Spain and Finland top outbound destinations

Outbound trips with at least one overnight in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	1,332,340	15%	1,294,469	16%
Finland	809,429	9%	783,131	9%
Denmark	665,290	7%	601,926	7%
Germany	632,752	7%	556,322	7%
United Kingdom	587,948	7%	522,544	6%
Norway	559,443	6%	530,453	6%
Greece	431,852	5%	431,852	5%
Italy	386,749	4%	380,593	5%
France	342,524	4%	302,243	4%
United States	316,549	4%	279,796	3%
Turkey	223,507	3%	215,463	3%
Poland	196,264	2%	147,140	2%
Other countries	2,400,303	27%	2,203,453	27%
TOTAL	8,884,950	100%	8,249,385	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- Sweden (33%)
- Spain (11%)
- USA/Canada (5%)
- Italy (4%)
- France (3%)
- Germany (3%)
- Greece (3%)
- Other EU28 (38%)
- Outside the EU28 (21%)

→ *Age not a relevant factor in choosing the destination*

Countryside most popular type of destination

Outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	1,650,500	20%
Countryside	2,011,247	24%
Seaside	1,607,858	19%
Cruise ship	563,630	7%
Mountains	165,807	2%
Other	2,250,344	27%

Outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,444,879	18%
25 to 34	1,224,470	15%
35 to 44	1,121,245	14%
45 to 64	2,612,107	32%
65 and over	1,846,683	22%
TOTAL	8,249,385	100%

Overnights on outbound trips

73% of outbound overnights realized on holiday/leisure trips

Spain is top destination in outbound overnights

Overnights on outbound trips in 2016 by purpose *(Eurostat)*

Purpose	N	%
Personal	68,150,282	96%
Holidays, leisure and recreation	51,464,839	73%
Visits to friends and relatives	10,656.,702	15%
Other (e.g. pilgrimage, health treatment)	6,028,741	9%
Professional, business	2,697,167	4%
TOTAL	70,847,450	100%

Overnights on outbound trips in 2016 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	13,004,933	18%	12,850,385	19%
Greece	4,535,144	6%	4,535,144	7%
United Kingdom	4,362,514	6%	4,111,516	6%
United States	3,152,689	4%	2,914,405	4%
Norway	3,017,580	4%	2,943,146	4%
Turkey	2,893,943	4%	2,877,856	4%
France	2,755,507	4%	2,639,031	4%
Finland	2,740,525	4%	2,657,336	4%
Germany	2,713,849	4%	2,438,944	4%
Italy	2,656,167	4%	2,650,011	4%
Denmark	2,217,037	3%	2,051,159	3%
Portugal	1,039,177	1%	994,218	1%
Other countries	25,758,385	36%	24,487,131	36%
TOTAL	70,847,450	100%	68,150,282	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	8,128,644	12%
Countryside	19,284,981	28%
Seaside	19,083,619	28%
Cruise ship	1,866,535	3%
Mountains	1,318,684	2%
Other	18,467,818	27%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	13,032,291	19%
25 to 34	9,472,847	14%
35 to 44	9,398,195	14%
45 to 64	19,967,996	29%
65 and over	16,278,954	24%
TOTAL	68,150,282	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Visiting friends and relatives and sun & beach the main reasons for going on holiday

- Visiting family/friends/relatives (VFR) (25%)
- Sun/beach (23%)
- Wellness/Spa/health treatment (17%)
- Culture (8%)
- Nature (7%)
- City trips (7%)
- Specific events (sporting events/festivals) (5%)
- Sport-related activities (3%)
- Other reason (5%)

→ *Specific events more important to younger tourists (14%) compared to to older tourists (4%)*

→ *Older tourists (55+) less motivated by sun & beach holiday (15%), but more with culture (11%) compared to other age groups*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and cultural and historical attractions main factors in staying loyal to the destination

- Natural features (19%)
- Cultural and historical attractions (16%)
- Quality of the accommodation (11%)
- Activities/services available (9%)
- General level of prices (7%)
- How tourists are welcomed (6%)
- Accessible facilities for people with special needs (1%)
- Other reasons (16%)
- 6% don't go back to the same place

→ *Cultural and historical attractions are more important for loyalty of tourists younger than 25 years of age (26%) compared to older tourists (15%)*

Environmentally-friendly factors

Every third tourist was influenced by sustain-able/ environmentally-friendly practices when choosing a destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 11% the accessibility of a destination by a means of environmentally-friendly transport
- 9% the introduction of sustainable/environmentally-friendly practices in the destination
- 8% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 8% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 66% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

Information sources

Recommendations, personal experience and websites the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (53%)
- Personal experience (46%)
- Websites (37%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (35%)
  - Websites run by service provider or by destination (19%)
- Newspaper, radio or TV (15%)
- Social media pages (15%)
- Paid for guidebooks and magazines (10%)
- Counters of travel agencies and tourism offices (9%)

→ *Recommendations of friends, colleagues or relatives more important for younger tourists (for 76% aged 15-24, 62% aged 25-39, 58% aged 40-54 and 39% aged 55+)*
→ *Websites more important for tourists younger than 55 years of age (58%) compared to older tourists (28%)*

Booking/transaction behaviors

Holiday organization

29% of outbound trips organized as package travel

Outbound trips for personal purposes with at least one overnight in 2014 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	2,453,150	29%
Non-package travel	5,886,199	71%
TOTAL	8,339,349	100%

Booking

Online commercial services most popular for booking

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 59% used online commercial services
  - 16% used online commercial services listing private housing offers from individuals
  - 47% used other online commercial services (tour operators, airline companies, etc.)
- 11% over the counter at a travel agency
- 10% over the phone
- 8% through someone they know
- 6% over the counter of a transportation company
- 3% on-site (place of holidays)
- 4% used other method(s)
- 14% did not book anything

→ *Online commercial services are used less often (44%) by older tourists (55+) compared to other age groups*

→ *7% of those younger than 25 years of age booked their holiday over the counter at a travel agency, compared to 21% of those older than 54 years of age*

Outbound trips for personal purposes with at least one overnight in 2014 by booking method *(Eurostat)*

Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	4,192,861	50%
Booking of the main means of accommodation via tour operator or travel agency	3,607,365	43%
Internet booking of the main means of transport	4,338,637	52%
Internet booking of the main means of accommodation	2,761,715	33%
Booking of the trip independent: direct booking with the service provider	1,381,950	17%
Booking of the trip independent: no booking was needed	1,505,158	18%

Share of online bookings when visiting Mediterranean destinations *(HTZ)*

- Tunisia (96%)
- Marocco (81%)
- Turkey (76%)
- Greece (74%)
- France (73%)
- Spain (72%)
- Italy (71%)
- Croatia (69%)
- Egypt (66%)

Tourist services are most often purchased separately

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

- 12% usually went on an all-inclusive holiday
- 17% usually booked other types of package travel (not all-inclusive)
- 52% usually purchased tourist services separately

Planning/itinerary behaviors

Planning the holiday

Holiday is usually planned at least three months in advance

Planning the main holiday *(HTZ: Swedavie)*

Planning period	%
6 months before holiday	30%
3 months before holiday	42%
1 month before holiday	23%
1 week before holiday	1%

Travel party

Family members are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 41% travelled with family members (including children)
- 28% travelled with a partner
- 14% travelled with family members (adults only)
- 17% travelled with friends
- 10% travelled alone
- 3% travelled with an organized group

→ *Travelling with a partner more common amongst older tourists (7% aged 15-24, 19% aged 25-39, 22% aged 40-54 and 44% aged 55+ travelled with a partner)*

→ *Travelling with family members more common amongst middle-aged tourists 25-39/40-54 years of age (66%/61%) compared to other age groups*

Length of stay

Outbound trips up to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2016 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	2,882,490	35%	5,714,394	9%
4 to 7 nights	3,109,509	38%	18,154,745	28%
8 to 14 nights	1,327,768	16%	14,787,961	23%
15+ nights	900,734	11%	25,547,835	40%

Type of accommodation

Hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	5,645,907	68%
Hotels or similar establishments	4,834,721	59%
Campsites, caravan or trailer park	75,998	1%
Other rented accommodation	735,188	9%
Total of non-rented accommodation	2,603,478	32%
Own holiday home	560,584	7%
Staying at relatives or friends	1,239,169	15%
Other non-rented accommodation	803,725	10%
TOTAL	8,249,385	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2016 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	43,638,015	64%
Hotels or similar establishments	34,795,307	51%
Campsites, caravan or trailer park	900,516	1%
Other rented accommodation	7,942,193	12%
Total of non-rented accommodation	24,512,267	36%
Own holiday home	7,809,750	11%
Staying at relatives or friends	11,242,196	16%
Other non-rented accommodation	5,460,321	8%
TOTAL	68,150,282	100%

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 48% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 20% stayed with friends or relatives
- 12% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 11% stayed at their own property or second home
- 7% went to a camp site
- 2% used other type of accommodation

→ *Paid commercial accommodation more popular among older tourists (usually used by 29% of those younger than 25 years of age compared to 53% of tourists older than 54 years of age)*

→ *Paid but private accommodation more popular among younger tourists (usually used by 25% of those younger than 25 years of age compared to 7% of tourists older than 54 years of age)*

Mode of transport

Air travel is the most important mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2016 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	4,620,079	56%
Land	2,755,718	33%
Motor vehicle	1,675,152	20%
Bus, coach	536,016	6%
Railways	438,579	5%
Other	105,971	1%
Waterway	873,589	11%
TOTAL	8,249,385	100%

Expenditures on outbound trips

Swedish tourists on average spent 509 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	509 €	143 €	188 €	178 €
Business	623 €	222 €	316 €	85 €
TOTAL	517 €	149 €	197 €	172 €

Swedish tourists on average spent 62 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	62 €	17 €	23 €	22 €
Business	147 €	52 €	74 €	20 €
TOTAL	65 €	19 €	25 €	22 €

(in %)

Purpose	Total	Transport	Accommo-dation	Other
Personal	100%	28%	37%	35%
Business	100%	35%	50%	15%
TOTAL	100%	29%	37%	34%

45 to 64 years old citizens are biggest spenders on outbound trips

Total expenditure on outbound trips for personal purpose with at least one overnight in 2016 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	722,579	17%
25 to 34	619,445	15%
35 to 44	623,637	15%
45 to 64	1,336,670	32%
65 and over	897,414	21%
TOTAL	4,199,747	100%

SWITZERLAND

Holiday/destination research and choice

Participation in tourism

2,582,048 Swiss citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

45 to 64 years of age is dominant age group in outbound travel

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	315,812	12%
25 to 34	444,996	17%
35 to 44	444,923	17%
45 to 64	950,773	37%
65 and over	425,544	16%
TOTAL	2,582,048	100%

Outbound trips

Swiss citizens made a total of 13,600,761 outbound trips in 2016 *(for professional or personal purposes with at least one overnight)*

Holidays, leisure and recreation dominant motives for outbound trips

Germany, Italy and France top outbound destinations

Outbound trips with at least one overnight in 2015 by purpose *(Eurostat)*

Purpose	N	%
Personal	12,751,742	94%
Holidays, leisure and recreation	8,390,180	62%
Visits to friends and relatives	3,284,342	24%
Other (e.g. pilgrimage, health treatment)	1,077,220	8%
Professional, business	849,020	6%
TOTAL	13,600,761	100%

Outbound trips with at least one overnight in 2015 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Germany	2,685,346	20%	2,424,921	19%
Italy	2,451,687	18%	2,371,028	19%
France	1,977,910	15%	1,907,713	15%
Austria	1,030,856	8%	1,012,321	8%
Spain	942,953	7%	904,531	7%
United Kingdom	459,979	3%	395,222	3%
Portugal	387,287	3%	359,877	3%
United States	341,800	3%	277,182	2%
Greece	273,103	2%	267,085	2%
Netherlands	244,033	2%	224,426	2%
Turkey	182,972	1%	181,045	1%
Croatia	155,947	1%	155,947	1%
Other countries	4,194,515	18%	3,640,068	18%
TOTAL	13,600,761	100%	12,751,742	100%

Outbound trips for personal purposes with at least one overnight in 2015 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	2,801,467	22%
Countryside	2,350,748	18%
Seaside	2,690,042	21%
Cruise ship	175,357	1%
Mountains	1,059,857	8%
Other	110,707	1%

Outbound trips for personal purposes with at least one overnight in 2015 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,305,783	10%
25 to 34	2,614,994	21%
35 to 44	2,335,085	18%
45 to 64	4,760,649	37%
65 and over	1,735,230	14%
TOTAL	12,751,742	100%

Overnights on outbound trips

Holidays, leisure and recreation dominant motives for outbound trips

Overnights on outbound trips in 2015 by purpose *(Eurostat)*

Purpose	N	%
Personal	105,848,968	96%
Holidays, leisure and recreation	74,843,341	71%
Visits to friends and relatives	25,623,633	24%
Other (e.g. pilgrimage, health treatment)	5,381,994	5%
Professional, business	4,349,360	4%
TOTAL	110,198,328	100%

Italy, Germany and France top outbound destinations in realized overnights

Overnights on outbound trips in 2015 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Italy	16,099,088	15%	15,907,630	15%
Germany	12,435,706	11%	11,713,524	11%
France	12,279,082	11%	12,009,355	11%
Spain	8,508,095	8%	8,262,613	8%
Austria	5,272,194	5%	5,225,488	5%
United States	5,186,822	5%	4,549,363	4%
Portugal	4,213,096	4%	4,137,758	4%
United Kingdom	2,969,823	3%	2,824,833	3%
Greece	2,481,953	2%	2,457,880	2%
Croatia	1,928,947	2%	1,928,947	2%
Turkey	1,765,535	2%	1,757,826	2%
Netherlands	1,102,434	1%	1,047,022	1%
Other countries	35,955,553	33%	34,026,729	32%
TOTAL	110,198,328	100%	105,848,968	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2015 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	18,435,553	17%
Countryside	25,765,379	24%
Seaside	31,616,061	30%
Cruise ship	1,759,283	2%
Mountains	6,786,391	6%
Other	1,453,570	1%

Overnights on outbound trips for personal purposes with at least one overnight in 2015 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	17,560,108	17%
25 to 34	19,820,815	19%
35 to 44	18,122,821	17%
45 to 64	36,148,041	34%
65 and over	14,197,184	13%
TOTAL	105,848,968	100%

Booking/transaction behaviors

Holiday organization

Outbound trips for personal purposes with at least one overnight in 2015 by type of organization *(Eurostat)*

Type of organization	N	%
Package travel	1,559,186	12%
Non-package travel	11,192,556	88%
TOTAL	12,751,742	100%

Booking

Outbound trips for personal purposes with at least one overnight in 2015 by booking method *(Eurostat)*
Multiple response.

Method used for booking	N	%
Booking of the main means of transport via tour operator or travel agency	2,032,790	16%
Booking of the main means of accommodation via tour operator or travel agency	2,195,385	17%
Internet booking of the main means of transport	4,742,250	37%
Internet booking of the main means of accommodation	5,834,673	46%
Booking of the trip independent: direct booking with the service provider	2,575,238	20%
Booking of the trip independent: no booking was needed	7,511,789	59%

Planning/itinerary behaviors

Length of stay

Outbound trips with 1 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2015 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	4,361,258	34%	9,558,327	10%
4 to 7 nights	4,031,245	32%	23,040,378	23%
8 to 14 nights	2,763,708	22%	31,267,573	31%
15+ nights	1,561,591	12%	36,341,225	36%

Type of accommodation

Outbound trips for personal purposes with at least one overnight in 2015 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	8,586,716	67%
Hotels or similar establishments	6,224,392	49%
Campsites, caravan or trailer park	438,992	3%
Other rented accommodation	1,923,331	15%
Total of non-rented accommodation	4,165,026	33%
Own holiday home	262,952	2%
Staying at relatives or friends	3,868,403	30%
Other non-rented accommodation	-	-
TOTAL	12,751,742	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2015 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	68,351,726	65%
Hotels or similar establishments	41,732,617	39%
Campsites, caravan or trailer park	5,083,597	5%
Other rented accommodation	21,535,512	20%
Total of non-rented accommodation	37,497,242	35%
Own holiday home	2,692,168	3%
Staying at relatives or friends	34,483,183	33%
Other non-rented accommodation	-	-
TOTAL	105,848,968	100%

Mode of transport

Outbound trips for personal purposes with at least one overnight in 2015 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	5,020,661	39%
Land	7,626,881	60%
Motor vehicle	5,926,281	46%
Bus, coach	475,734	4%
Railways	1,207,307	9%
Other	-	-
Waterway	104,199	1%
TOTAL	12,751,742	100%

Expenditures on outbound trips

Swiss tourists on average spent 950 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Restaurants/ cafes	Accommo-dation	Other
Personal	950 €	299 €	195 €	330 €	125 €
Business	1,849 €	1,000 €	197 €	535 €	116 €
TOTAL	1,006 €	343 €	196 €	343 €	124 €

Swiss tourists on average spent 114 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2016 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Restaurants/ cafes	Accommo-dation	Other
Personal	114 €	36 €	23 €	40 €	15 €
Business	361 €	195 €	38 €	105 €	23 €
TOTAL	124 €	42 €	24 €	42 €	15 €

(in %)

Purpose	Total	Transport	Restaurants/ cafes	Accommo-dation	Other
Personal	100%	32%	20%	35%	13%
Business	100%	54%	11%	29%	6%
TOTAL	100%	34%	19%	34%	12%

Total expenditure on outbound trips for personal purpose with at least one overnight in 2015 by age group *(Eurostat)*

(in 000 €)

Age (years)	N	%
15 to 24	1,514,148	12%
25 to 34	2,153,036	18%
35 to 44	1,683,634	14%
45 to 64	4,775,130	39%
65 and over	1,992,327	16%
TOTAL	12,118,275	100%

TURKEY

Holiday/destination research and choice

Participation in tourism

49% travelled at least once in 2015

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (50%)
- Once (12%)
- Twice (9%)
- 3 times (6%)
- 4 or 5 times (9%)
- 6 to 10 times (6%)
- More than 10 times (7%)

→ *51% of those younger than 55 years of age travelled at least once, compared to 40% in 55+ age group*

Outbound trips

Residents of Turkey made a total of 8,886,916 outbound trips in 2017

Travel, entertainment, sportive or cultural activities dominant motives for outbound trips

Number of Turkish citizens visiting destinations abroad in 2017 by purpose of visit *(TurkStat Arriving Citizens Survey)*

Purpose	N	%
Travel, entertainment, sportive or cultural activities	3,960,800	45%
Visiting relatives and friends	1,898,321	21%
Education, training (less than a year)	77,316	1%
Health or medical reasons (less than a year)	9,881	0.1%
Religion / Pilgrimage	488,104	5%
Shopping	30,996	0.3%
Business (conferences, meetings, assignments etc.)	1,563,614	18%
Other	255,044	3%
Accompanying persons	602,841	7%
TOTAL	8,886,916	100%

Georgia, Greece and Bulgaria top outbound destinations

Citizens visiting abroad by destination countries in 2017 *(TurkStat Arriving Citizens Survey)*

Destination	N	%
Georgia	1,000,278	11%
Greece	921,262	10%
Bulgaria	807,645	9%
Germany	452,412	5%
Italy	291,788	3%
Iran	281,443	3%
Azerbaijan	256,138	3%
France	194,715	2%
Ukraine	168,911	2%
USA	157,896	2%
Austria	124,976	1%
Netherlands	90,326	1%
Switzerland	82,971	1%
Spain	79,384	1%
Russian Federation	73,399	1%
Other countries	4,456,912	47%
TOTAL	9,440,457	100%

Holidays taken in 2015 *(Flash Eurobarometer 432)*

Destination	%
In country	88%
France	3%
Germany	3%
Greece	3%
Austria	1%
Belgium	1%
Bulgaria	1%
Cyprus	1%
Italy	1%
Netherlands	1%
Spain	1%
United Kingdom	1%
USA or Canada	1%
North Africa / The Middle East	2%
Asia / Oceania	1%
Other	6%
Don't know	1%
In the EU28	13%
Total 'Outside the EU28'	10%

→ *Older tourists have higher propensity to travel outside Turkey (89% of those younger than 55 years of age spent their holiday domestically, compared to 71% in 55+ age group)*

Overnights on outbound trips

Hotel accommodation most popular

Overnights on outbound trips in 2017 by type of accommodation *(TurkStat Arriving Citizens Survey)*

Type of accommodation	N	%
Hotel, Motel, Pension etc.	29,245,035	33%
Private House	4,749,463	5%
Rental House	8,327,192	9%
Friend, Relative house	23,477,434	27%
Other	21,932,944	25%
TOTAL	87,732,068	100%

Average number of overnights on outbound trips in 2017 *(TurkStat Arriving Citizens Survey)*

- 9.9

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Visiting friends and relatives and sun & beach the main reasons for going on holiday

- Visiting family/friends/relatives (VFR) (28%)
- Sun/beach (27%)
- City trips (9%)
- Nature (8%)
- Culture (7%)
- Wellness/Spa/health treatment (5%)
- Specific events (sporting events/festivals) (4%)
- Other reason (12%)

→ *Older tourists (55+) less motivated by sun & beach holiday (15%), but more with wellness/Spa/health treatment (13%) compared to other age groups*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and quality of the accommodation main factors in staying loyal to the destination

- Natural features (23%)
- Quality of the accommodation (20%)
- General level of prices (16%)
- Cultural and historical attractions (12%)
- How tourists are welcomed (6%)
- Activities/services available (6%)
- Accessible facilities for people with special needs (6%)
- Other reasons (5%)
- 1% don't go back to the same place

→ *Quality of the accommodation more important for tourists 25-39 years old (25%) compared to younger or older tourists (17%)*

→ *For every tenth tourist younger than 25 years of age the most important factor is how they are welcomed, compared to 2% of those older than 54 years of age*

Environmentally-friendly factors

The majority of tourists were influenced by sustainable/ environmentally-friendly practices when choosing the destination

Relevance of environmentally-friendly factors when choosing the destination for main holiday in 2015 *(Flash Eurobarometer 432)*

- 34% the introduction of sustainable/environmentally-friendly practices in the destination
- 23% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 22% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 22% the accessibility of a destination by a means of environmentally-friendly transport
- 11% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

→ *86% of those younger than 25 years of age were influenced by at least one of the above factors when choosing the destination, compared to 73% of those older than 54 years of age*

Information sources

Recommendations and websites the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (52%)
- Websites (32%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (25%)
  - Websites run by service provider or by destination (10%)
- Personal experience (23%)
- Social media pages (19%)
- Newspaper, radio or TV (9%)
- Paid for guidebooks and magazines (5%)
- Counters of travel agencies and tourism offices (5%)

→ *Personal experience more important for younger tourists (for 33% of those younger than 25 years of age and for 16% of those older than 54 years of age)*
→ *Websites more important for younger tourists (for 38% of those younger than 25 years of age and for 18% of those older than 54 years of age)*

Booking/transaction behaviors

Type of holiday (with 4 to 13 overnights) taken most often in 2015 *(Flash Eurobarometer 432)*

Tourist services are often purchased separately

- 35% usually went on an all-inclusive holiday
- 15% usually booked other types of package travel (not all-inclusive)
- 38% usually purchased tourist services separately

Booking

27% used online commercial services for booking, 30% did not book anything

Methods used to book holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 27% used online commercial services
  - 6% used online commercial services listing private housing offers from individuals
  - 22% used other online commercial services (tour operators, airline companies, etc.)
- 17% through someone they know
- 11% over the phone
- 11% on-site (place of holidays)
- 9% over the counter at a travel agency
- 4% over the counter of a transportation company
- 5% used other method(s)
- 30% did not book anything

→ *Online commercial services more popular among tourists aged 25-39 (37%) compared to younger or older tourists (22%)*

Planning/itinerary behaviors

Travel party

Family members and friends are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 15% travelled alone
- 21% travelled with a partner
- 17% travelled with family members (adults only)
- 25% travelled with family members (including children)
- 24% travelled with friends
- 5% travelled with an organized group

→ *Travelling with a partner more common amongst older tourists (5% aged 15-24, 26% aged 25-39, 25% aged 40-54 and 33% aged 55+ travelled with a partner)*
→ *Travelling with friends more common amongst younger tourists (42% aged 15-24, 20% aged 25-39, 15% aged 40-54 and 16% aged 55+ travelled with a friend)*

Type of accommodation

Paid commercial accommodation is dominant

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 48% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 26% stayed with friends or relatives
- 12% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 9% stayed at their own property or second home
- 3% went to a camp site

- 2% used other type of accommodation

→ *Paid commercial accommodation more popular among older tourists (usually used by 32% of those younger than 25 years of age compared to 55% of older tourists)*
→ *Staying with friends or relatives more popular among younger tourists (usually used by 36% of those younger than 25 years of age compared to 19% of tourists older than 54 years of age)*

Expenditures on outbound trips

Expenditures on package tours account for 20% of total tourism expenditure realized by outbound tourists

Expenditures on outbound trips in 2017 by type of expenditure *(TurkStat Arriving Citizens Survey)*

(in 000 $)

Type of expenditure	N	%
Package tour expenditures	1,042,124	20%
Individual expenditures	4,095,120	80%
Tourism expenditure	5,137,244	100%

Food and beverage and accommodation the main expenditure categories for outbound Turkish travellers

Expenditures on outbound trips in 2017 by expenditure categories *(TurkStat Arriving Citizens Survey)*

(in 000 $)

Expenditure category	N	%
Food and beverage	1,094,160	21%
Accommodation	1,039,678	20%
Health	7,456	0.1%
Transport (In abroad)	263,402	5%
Sports, education, culture	208,443	4%
Tour services	18,005	0.4%
International transport by foreign company	211,576	4%
GSM roaming expenditures	103,283	2%
Other goods and services	1,149,116	22%
Clothes and shoes	227,993	4%
Souvenirs	401,136	8%
Carpet, rug etc.	4,406	0.1%
Other expenditures	515,582	10%

Residents of Turkey on average spent 578 $ per capita when travelling abroad

Average expenditures on outbound trips in 2017 (per capita) *(TurkStat Arriving Citizens Survey)*

- 578 $

UNITED KINGDOM

Holiday/destination research and choice

Participation in tourism

10,693,610 UK citizens participated in outbound trips in 2016 *(for personal purposes with at least one overnight stay)*

45 to 64 years of age is dominant age group in outbound travel

73% travelled at least once in 2015

Participation in tourism for personal purposes with at least one overnight in 2016 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	1,758,480	16%
25 to 34	2,299,830	22%
35 to 44	1,997,900	19%
45 to 64	3,240,990	30%
65 and over	1,396,410	13%
TOTAL	10,693,610	100%

Number of times travelling for professional or personal reasons with at least one overnight in 2015 *(Flash Eurobarometer 432*)*

- None (26%)
- Once (13%)
- Twice (14%)
- 3 times (10%)
- 4 or 5 times (15%)
- 6 to 10 times (14%)
- More than 10 times (7%)

Outbound trips

UK citizens made a total of 52,277,882 outbound trips in 2013 *(for professional or personal purposes with at least one overnight)*

Holidays, leisure and recreation dominant motives for outbound trips

Spain and France top outbound destinations

Outbound trips with at least one overnight in 2013 by purpose *(Eurostat)*

Purpose	N	%
Personal	46,427,359	89%
Holidays, leisure and recreation	33,928,991	65%
Visits to friends and relatives	11,537,102	22%
Other (e.g. pilgrimage, health treatment)	961,266	2%
Professional, business	5,850,523	11%
TOTAL	52,277,882	100%

Outbound trips with at least one overnight in 2013 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	11,074,445	21%	10,786,593	23%
France	7,303,779	14%	6,574,623	14%
Italy	2,664,095	5%	2,390,104	5%
Germany	2,196,093	4%	1,440,926	3%
Ireland	2,015,345	4%	1,672,126	4%
Portugal	2,011,316	4%	1,961,547	4%
Netherlands	1,788,058	3%	1,383,915	3%
Greece	1,738,236	3%	1,700,851	4%
Poland	1,556,792	3%	1,451,325	3%

Turkey	1,276,698	2%	1,194,944	3%
Belgium	1,150,160	2%	860,817	2%
Switzerland	850,439	2%	602,042	1%
Other countries	16,652,426	32%	14,407,546	31%
TOTAL	52,277,882	100%	46,427,359	100%

Destination of the main holiday in 2015 *(Flash Eurobarometer 432)*

- UK (33%)
- Spain (14%)
- France (7%)
- USA and Canada (5%)
- North Africa (5%)
- Asia (5%)
- Other EU28 (40%)
- Outside the EU28 (26%)

→ *Age not a relevant factor in choosing the destination*

Cities most popular type of destination

Outbound trips for personal purposes with at least one overnight in 2013 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	31,269,060	67%
Countryside	12,181,320	26%
Seaside	21,171,382	46%
Cruise ship	142,521	0.3%
Mountains	5,890,769	13%
Other	3,468,537	7%

Outbound trips for personal purposes with at least one overnight in 2013 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	5,307,314	11%
25 to 34	9,545,938	21%
35 to 44	9,196,065	20%
45 to 64	16,756,686	36%
65 and over	5,621,356	12%
TOTAL	46,427,359	100%

Overnights on outbound trips

59% of outbound overnights realized on holiday/leisure trips

Overnights on outbound trips in 2013 by purpose *(Eurostat)*

Purpose	N	%
Personal	524,519,146	93%
Holidays, leisure and recreation	331,142,977	59%
Visits to friends and relatives	175,497,122	31%
Other (e.g. pilgrimage, health treatment)	17,879,048	3%
Professional, business	39,425,899	7%
TOTAL	563,945,045	100%

Spain and France top outbound destinations in realized overnights

Overnights on outbound trips in 2013 by country of destination *(Eurostat)*

Destination	Total trips		Personal trips	
	N	%	N	%
Spain	101,730,963	18%	100,334,503	19%
France	58,052,218	10%	54,570,435	10%
Italy	20,507,258	4%	19,247,402	4%
Greece	18,789,381	3%	18,429,431	4%
Portugal	18,431,284	3%	18,194,313	3%
Poland	16,569,128	3%	15,874,909	3%
Turkey	15,324,374	3%	14,682,775	3%
Germany	12,843,813	2%	9,998,682	2%
Ireland	12,029,493	2%	10,701,339	2%
Netherlands	7,875,374	1%	6,333,640	1%
Cyprus	7,379,804	1%	7,346,650	1%
Switzerland	5,438,557	1%	4,327,837	1%
Other countries	268,973,398	48%	244,477,230	47%
TOTAL	563,945,045	100%	524,519,146	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2013 by type of destination *(Eurostat)*
Multiple response.

Type of destination	N	%
City	365,356,556	70%
Countryside	179,772,131	34%
Seaside	253,355,398	48%
Cruise ship	3,210,361	1%
Mountains	84,871,750	16%
Other	42,295,415	8%

Overnights on outbound trips for personal purposes with at least one overnight in 2013 by age group *(Eurostat)*

Age (years)	N	%
15 to 24	71,619,320	14%
25 to 34	98,142,166	19%
35 to 44	97,493,466	19%
45 to 64	178,194,427	34%
65 and over	79,069,768	15%
TOTAL	524,519,146	100%

The main reason for going on holiday in 2015 *(Flash Eurobarometer 432)*

Sun & beach holiday and visiting friends and relatives the main reasons for going on holiday

- Sun/beach (27%)
- Visiting family/friends/relatives (VFR) (27%)
- Culture (9%)
- Nature (8%)
- City trips (7%)
- Specific events (sporting events/festivals) (4%)
- Sport-related activities (3%)
- Wellness/Spa/health treatment (2%)
- Other reason (12%)

→ *City trips less important with age (11% for 15-24, 8% for 25-39, 7% for 40-54 and 5% for 55+ years of age)*

The main reason for returning to the same place for a holiday *(Flash Eurobarometer 432)*

Natural features and the quality of the accommodation main factors in staying loyal to the destination

- Natural features (20%)
- Quality of the accommodation (18%)
- Cultural and historical attractions (16%)
- Activities/services available (13%)
- How tourists are welcomed (7%)
- General level of prices (6%)
- Accessible facilities for people with special needs (4%)
- Other reasons (7%)
- 7% don't go back to the same place

→ *The quality of the accommodation more important with age (14% for 15-24, 16% for 25-39 and 20% for 40+ years of age)*

→ *Cultural and historical attractions are more important for loyalty of tourists younger than 25 years of age (20%) compared to those older than 54 years of age (14%)*

→ *Activities/services available are more important for loyalty of tourists younger than 25 years of age (20%) compared to older tourists, especially those older than 54 years of age (14%)*

Environmentally-friendly factors

Approximately every second tourist was influenced by sustain-able/ environmentally-friendly practices when choosing the destination

Relevance of environmentally-friendly factors when choosing a destination for the main holiday in 2015 *(Flash Eurobarometer 432)*

- 27% the introduction of sustainable/environmentally-friendly practices in the destination
- 25% the accessibility of a destination by a means of environmentally-friendly transport
- 21% the introduction of sustainable/environmentally-friendly tourism practices at the accommodation facility
- 18% the destination or service used is certified with a label indicating sustainable/environmentally-friendly practices
- 47% not influenced by any of the above factors when choosing the destination of the main holiday in 2015

→ *The introduction of sustainable/environmentally-friendly practices in the destination is more important for tourists younger than 25 years of age (35%) compared to older tourists (25%)*

Information sources

Recommendations, personal experience and websites the most important sources of information

The most important information sources when making a decision about travel plans *(Flash Eurobarometer 432)*
Multiple response.

- Recommendations of friends, colleagues or relatives (61%)
- Websites (51%)
  - Websites collecting and presenting comments, reviews and ratings from travellers (42%)
  - Websites run by service provider or by destination (17%)
- Personal experience (39%)
- Social media pages (18%)
- Paid for guidebooks and magazines (11%)

	○ Newspaper, radio or TV (11%) ○ Counters of travel agencies and tourism offices (9%) → *Recommendations of friends, colleagues or relatives more important for younger tourists (for 73% aged 15-24, 66% aged 25-39, 63% aged 40-54 and 51% aged 55+)* → *Websites collecting and presenting comments, reviews and ratings from travellers more important for younger tourists (for 44% aged 15-24, 54% aged 25-39, 48% aged 40-54 and 27% aged 55+)*

Booking/transaction behaviors

Booking	

Online commercial services most popular for booking	**Methods used to book holiday in 2015** *(Flash Eurobarometer 432)*
	Multiple response.
	○ 61% used online commercial services
	  ○ 19% used online commercial services listing private housing offers from individuals
	  ○ 52% used other online commercial services (tour operators, airline companies, etc.)
	○ 26% over the phone
	○ 20% through someone they know
	○ 15% over the counter at a travel agency
	○ 12% over the counter of a transportation company
	○ 11% on-site (place of holidays)
	○ 4% used other method(s)
	○ 5% did not book anything
	→ *11% of those younger than 25 years of age booked their holiday over the counter at a travel agency, compared to 18% of those older than 54 years of age*

Tourist services are most often purchased separately	**Type of holiday (with 4 to 13 overnights) taken most often in 2015** *(Flash Eurobarometer 432)* ○ 51% usually purchased tourist services separately ○ 20% usually went on an all-inclusive holiday ○ 21% usually booked other types of package travel (not all-inclusive)

Planning/itinerary behaviors

Travel party

Partners and family members are dominant travel companions

Travel party on the main holiday in 2015 *(Flash Eurobarometer 432)*
Multiple response.

- 37% travelled with a partner
- 31% travelled with family members (including children)
- 21% travelled with friends
- 18% travelled with family members (adults only)
- 12% travelled alone
- 8% travelled with an organized group

→ *Travelling with a partner more common amongst older tourists (19% aged 15-24, 32% aged 25-39, 45% aged 40-54 and 43% aged 55+ travelled with a partner)*

Length of stay

Outbound trips with 4 to 7 nights the most popular

Outbound trips for personal purposes with at least one overnight in 2013 by length of stay *(Eurostat)*

Length of stay	Number of trips		Number of overnights	
	N	%	N	%
1 to 3 nights	7,318,438	16%	18,053,608	3%
4 to 7 nights	18,017,276	39%	109,243,339	21%
8 to 14 nights	12,873,234	28%	145,591,585	28%
15+ nights	8,218,441	18%	251,630,615	48%

Type of accommodation

Hotel accommodation dominant

Outbound trips for personal purposes with at least one overnight in 2013 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	33,373,310	72%
Hotels or similar establishments	28,306,685	61%
Campsites, caravan or trailer park	4,680,810	10%
Other rented accommodation	385,815	1%
Total of non-rented accommodation	13,054,049	28%
Own holiday home	304,920	1%
Staying at relatives or friends	12,297,704	26%
Other non-rented accommodation	451,425	1%
TOTAL	46,427,359	100%

Overnights on outbound trips for personal purposes with at least one overnight in 2013 by type of accommodation *(Eurostat)*

Type of accommodation	N	%
Total of rented accommodation	320,419,613	61%
Hotels or similar establishments	210,322,966	40%
Campsites, caravan or trailer park	105,147,014	20%

Other rented accommodation	4,949,633	1%
Total of non-rented accommodation	204,099,533	39%
Own holiday home	5,720,954	1%
Staying at relatives or friends	183,179,186	35%
Other non-rented accommodation	15,199,394	3%
TOTAL	524,519,146	100%

Paid commercial accommodation is dominant

Type of accommodation most often used for personal travel (with 4 to 13 overnights) in 2015 *(Flash Eurobarometer 432)*

- 56% used paid commercial accommodation (e.g. hotel, hostel, etc.)
- 17% stayed with friends or relatives
- 13% used paid but private accommodation (e.g. rented apartment, guest house, etc.)
- 11% went to a camp site
- 2% stayed at their own property or second home

→ *Paid commercial accommodation more popular among older tourists (usually used by 47% of those younger than 25 years of age compared to 59% of tourists older than 54 years of age)*

→ *Paid but private accommodation more popular among younger tourists (usually used by 20% of those younger than 25 years of age compared to 12% of tourists older than 54 years of age)*

Mode of transport

Air travel is the most important mode of transport for outbound holiday trips

Outbound trips for personal purposes with at least one overnight in 2013 by mode of transport *(Eurostat)*

Mode of transport	N	%
Air	38,980,500	84%
Land	3,260,012	7%
Motor vehicle	–	–
Bus, coach	–	–
Railways	3,260,012	7%
Other	–	–
Waterway	4,186,847	9%
TOTAL	46,427,359	100%

Expenditures on outbound trips

UK tourists on average spent 712 € per outbound trip made for personal purposes

Average expenditure per outbound trip with at least one overnight in 2013 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	712 €	278 €	362 €	72 €
Business	862 €	334 €	474 €	53 €
TOTAL	729 €	284 €	374 €	70 €

UK tourists on average spent 63 € per day on an outbound trip made for personal purposes

Average daily expenditure per outbound trip with at least one overnight in 2013 by expenditure categories *(Eurostat)*

(in €)

Purpose	Total	Transport	Accommo-dation	Other
Personal	63 €	24 €	32 €	7 €
Business	128 €	50 €	70 €	8 €
TOTAL	68 €	26 €	35 €	7 €

(in %)

Purpose	Total	Transport	Accommo-dation	Other
Personal	100%	38%	51%	11%
Business	100%	39%	55%	6%
TOTAL	100%	38%	51%	11%

Total expenditure on outbound trips for personal purpose with at least one overnight in 2013 by age group *(Eurostat)*

45 to 64 years old citizens are biggest spenders on outbound trips

(in 000 €)

Age (years)	N	%
15 to 24	3,184,856	10%
25 to 34	5,805,031	18%
35 to 44	6,742,264	20%
45 to 64	13,169,134	40%
65 and over	4,150,377	13%
TOTAL	33,051,663	100%

CHINA[1]

Holiday/destination research and choice

Participation in tourism

135 million Chinese citizens participated in outbound trips in 2016

Participation in outbound tourism by year (in millions) *(UNWTO, Compendium of Tourism Statistics dataset)*

Year	N (in millions)
2013	98
2014	117
2015	128
2016	135

Outbound trips

Asia Pacific most popular outbound region

Destination of the main holiday in 2014 by world regions (*Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf)*

- Asia Pacific (63%)
- Europe (26%)
- Americas (8%)
- Africa (2%)
- Middle East (1%)

Thailand and Japan most popular outbound destinations

Top outbound tourism destinations in 2017
(https://www.travelchinaguide.com/tourism/2017statistics/)

- Thailand
- Japan
- Singapore
- South Korea
- Malaysia
- United States
- Indonesia
- Vietnam
- Phillipines
- Australia

[1] For more information visit online toolkit providing knowledge, sharing information and flagging events linked to the "2018 EU-China Tourism Year", https://ecty2018.org/.

Chinese outbound tourism to Europe in 2015 *(Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf)*

- 12 million visits
- 50 million nights

- 35 years of age and older tourists are dominant group in outbound travel

France and Italy most popular outbound EU destinations

Destination of the main holiday in 2014 by EU destinations (*Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf)*

- France (24%)
- Italy (23%)
- Germany (16%)
- Spain (9%)
- Austria (8%)
- Other EU28 countries (21%)

Motives for going on holiday

The main reason for going on holiday in 2015 (*Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf)*

- Historical culture and heritage

Travel motivation *(HTZ)*

- Sightseeing (73%)
- Gastronomy (64%)
- Shopping (56%)

→ *Sightseeing, sun & beach, visiting museums and galleries, and going on organized tours more popular among tourists older than 34 years of age compared to younger tourists who are more interested in gastronomy, shopping and concerts*

Travel concerns

Travel concerns for Chinese travellers before travelling abroad *(HTZ)*

- Language (74%)
- Safety (41%)
- Cultural differences (40%)
- Service/product quality (29%)
- Availability of information (22%)
- Medical help (21%)

The most important information sources when making a decision about travel plans in 2014 *(Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf; http://www.chinatraveldiscovery.com/top-ten-biggest-travel-agencies-in-china.htm)*

Websites the most important sources of information

- Online on travel search engines, (micro)blogs or social media (68%)
- Destination marketing relies on localized social media platforms instead of Facebook or Instagram

Travel websites in China are numerous

- www.tianxun.com (established by www.skyscanner.com)
- www.youzhan.com (established by www.trivago.com)
- Ctrip
- Elong
- Qunar
- Lvmama
- Mafenfwo.com
- Baidu travel
- Lvping
- Daodao
- Youdodo
- …

Booking/transaction behaviors

Holiday organization

Type of holiday taken most often in 2015 *(Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf)*

- Package trips involving group tours with multiple destination stops
- 40% travel in groups organized by travel agencies

Trip organization	%
Organized travel	40%
Individual travel	60%

Methods used to book holiday in 2015 *(Tourism in focus: The Chinese Outbound Travel Market, https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf)*

Offline commercial services most popular for booking

- Mainly offline to avoid tedious visa procedures, to be assisted in their first long-haul trip or to fulfill special requests
- 1 in 5 book online

Planning/itinerary behaviors

Length of stay	
	Outbound trips in 2016 by length of stay *(HTZ)* ○ 28% of tourists on average realized only 1 overnight ○ 58% of tourists on average realized 2-3 overnights ○ 11% of tourists on average realized 4-6 overnights

Expenditures on outbound trips in 2013 (*https://www.travelchinaguide.com/tourism/2017statistics/; https://ecty2018.org/wp-content/uploads/2017/08/EC-2016-The-Chinese-Outbound-Travel-Market.pdf)*

Region	€
World	1000
Europe	1500-3000

MIDDLE EAST

Holiday/destination research and choice

The main reasons for going on outbound travel *(Market Vision, UNWTO)*	
Leisure is the main reason for going on holiday	○ Leisure (50%) ○ Business (25%) ○ Visiting family/friends/relatives (VFR) (20%) ○ Medical/health treatment, religiuos and other reasons (5%) → *In 2014, about two thirds of outbound trips by UAE citizens were for holiday purposes (IPK World Travel Monitor)* → *79% of outbound trips of Saudi Arabia citizens in 2009 were motivated by leisure (UNWTO)* → *Top drivers for a holiday in Europe among GCC travellers were natural scenic beauty, good (cool, cold) weather, towns and cities great for holiday and culture (UNWTO)* → *Escape from the hot weather motivates outbound travel of most Middle East residents*

The main reasons for going on holiday in Europe *(UNWTO)*	
Good weather and prestige important drivers of travelling to Europe	○ Natural scenic beauty ○ Good weather ○ Towns and cities great for holiday ○ Prestigious holiday destination region ○ Culture, history and sightseeing attractions ○ Shopping

Top 5 destinations in Europe *(Tourism Ireland)*	
	1. United Kingdom 2. Germany 3. Switzerland 4. Italy 5. Austria

Middle East traveller profile *(Market Vision, UNWTO)*	
Well-educated and relatively young travellers with high income	○ More males than females ○ Young (half belonging to 18-34 years of age group) ○ Well-educated (about two thirds with at least graduare degree) ○ Majority married, with children ○ High income ○ Long stay

Barriers to holiday in Europe *(UNWTO)*	
Cost, need for visa and food are the main barriers for going on holiday in Europe	○ Cost ○ Visa-related issues ○ Accessibility ○ Food ○ Language ○ Safety and security ○ Cultural affinity

Holiday preferences of Middle East travellers *(Market Vision)*	
City, beach, shopping and sightseeing holidays are preferred	○ City holiday ○ Culture/sightseeing trip ○ Beach holiday ○ Shopping trip ○ Visit to leisure/theme park ○ Touring/driving holiday

Information sources *(UNWTO; Observatoire Valaisan du Tourisme)*	
Recommendations of friends and relatives are the primary source of information	○ Recommendations of friends and family primary source of information (71% for GCC travellers) ○ Travel agencies also an important source of information (traditional travel agencies are key to the GCC's travel planning process) ○ Web increasingly popular as a source of information on travel destinations **Top 5 Media channels for travel trade/consumers** *(Tourism Ireland)* *English* 1.Travel Trade Weekly 2.Travel and Tourism News Middle East 3. Condé Nast Traveller Middle East 4.Travel Trade Gazette MENA 5. Travel and Tour World *Arabic* 1. Ara Magazine 2. Zahrat Al Khaleej 3. Travel Arabia 4. Laha Magazine 5. Shabab 20 Important online travel sources ○ booking.com ○ cleartrip.com ○ expedia.com ○ hotels.com ○ wego.com ○ tajawal.ae ○ Other sources of online information gathering are travel blogs, social media websites, travel review websites such as Trip Advisor,

	independent travel advice websites such as Lonely Planet and National Tourist Board websites The most important information sources for GCC travellers ○ Google and Yahoo are the most popular search engines used by potential travellers in the GCC ○ Popular websites: official websites of destinations, country tourism portals, third party travel websites (e.g. expedia.com, booking.com, hotels.com), airline websites, travel review sites (e.g. tripadvisor.com), online travel guides, etc. ○ GCC travellers also use Facebook and Youtube ○ Travel forums, particularly on Arabic community websites (e.g. http://travel.maktoob.com, www.omaniaa.net, www.Eqla3.com, http://www.s-oman.net, http://forum.uaewomen.net, www.alsaha.com, www.eyoon.com and www.alr7al.com)

Market segments *(Observatoire Valaisan du Tourisme)*	
	○ Family market (young family with small children or older family) ○ VFR (Visit Friends and Relatives) market ○ Couples ○ Youth (single travelers or group of friends) ○ Honeymooners

Tips for doing business with GCC market *(Observatoire Valaisan du Tourisme)*	
	With tour operators ○ Introduce new products ○ Bundle secondary destinations together ○ Educate agents **For hotels** ○ Work closely with travel agencies rather then trying to sell directly ○ Focus on all-inclusive offers ○ Provide basic cultural requirements ○ Privacy is important ○ Offer halal food and a wide selection of soft drinks ○ Strong emphasis on family activities, promote offer for kids ○ Women play a vital role in the choice of holiday destinations, accommodation and activities

Booking/transaction behaviors

Booking *(UNWTO)*	

Middle East is a late booking market	○ Middle East is a late booking market
	○ Many travellers book their summer holiday less than two weeks before travelling
	○ Travel agencies are primary booking channel
	○ There are well over 6,000 travel agents and tour operators in the Middle East; the vast majority are small operators primarily focused on airline ticket sales
	○ Limited number of 'local' online travel agencies (OTAs) in the Middle East
	    ○ myTravelChannel.com is the leading travel portal in the Middle East, owned by the Emirates Group
	    ○ OctopusTravel.com
	    ○ Hotels.com
	○ The world's leading travel distribution system companies set up regional offices in the Middle East (e.g. Amadeus (www.amadeus.com), Travelport (www.travelport.com), Sabre Holdings (www.sabre-holdings.com))
	○ Direct methods of booking are gaining popularity
	
	Travel Trade Associations
	○ Dubai Travel and Tour Agents Group, Dubai, United Arab Emirates (www.dttag.com)
	○ Abu Dhabi Travel and Tourism Agencies Council, Abu Dhabi, United Arab Emirates (www.attac.ae)
	○ Sharjah Travel Agents Association c/o OTTA (www.orienttravels.com)
	○ Jordan Inbound Tour Operators Association, Jordan (www.jitoa.org)
	○ Jordan Society of Travel and Tourism Agents, Jordan (www.jsta.org.jo)
	○ Egyptian Travel Agents Association, Egypt (www.etaa-egypt.org)
	○ Egyptian Hotels Association, Egypt (www.eha.org.eg)
	○ Association of Travel & Tourist Agents in Lebanon, Lebanon (www.attallb.com)
	○ Association of Bahrain Tours & Travel Agents, Bahrain
	○ Kuwait Travel and Tourism Agencies Association, Kuwait (www.kttaa.org)
	○ Syrian Association of Travel and Tourist Agents, Syria (http://satta1.com)
	○ Travel and Tourism Committee at Jeddah Chamber of Commerce and Industry (http://www.jedtourism.com/Topic.aspx?lng=en&id=8)
	○ United Saudi Travel Agents, Saudi Arabia

Planning/itinerary behaviors

Travel party *(UNWTO)*

Family members are dominant travel companions	○ Mainly family members ○ Small proportion travels with family and friends → *Travellers from Saudi Arabia mostly travel in large family groups, other Middle East markets mostly travel alone, with a partner or in a small family group*

Length of stay

Long trips popular	○ Average length of stay in Europe varies from 3 nights (in Austria) to 19 nights (in Germany) *(UNWTO)* ○ UAE travellers tend to go on long trips, with an average trip length of 14 nights, and almost 30% lasting 16 or more nights *(IPK World Travel Monitor)* ○ GCC travellers spend an average of 13 nights on outbound trips *(Observatoire Valaisan du Tourisme)*

Type of accommodation *(UNWTO)*

High quality accommodation preferred	○ UAE citizens prefer five star or four star hotels and furnished apartments/villas

Activities *(UNWTO)*

Relaxing, shopping and visiting restaurants are amongst the most popular activities	**Key activities** ○ Walking and enjoying the atmosphere ○ Relaxing ○ Enjoying the hotel/resort ○ Enjoying the weather ○ Shopping ○ Dining out ○ Going to beaches/seaside ○ Going on sightseeing trips ○ Shopping is the primary activity for the GCC outbound tourists who are high spenders for luxury goods *(Observatoire Valaisan du Tourisme)* ○ Two thirds of Middle East travellers visit a single country during their travel *(UNWTO)* ○ multi-country visits in a single trip are gaining popularity especially in European countries ○ Arab guests rarely book excursions in advance *(Observatoire Valaisan du Tourisme)*

Expenditures on outbound trips	
Middle East travellers are high spenders	○ UAE travellers on average spend about 200 € per person per night, or about 2,800 € per person per trip *(IPK World Travel Monitor)* ○ Travellers from Saudi Arabia on average spend about 133 € per person per night, or about 2,808 € per person per trip *(German National Tourism Board, 2007)*

KUWAIT

Holiday/destination research and choice

Top outbound tourism destinations in 2016 *(UNWTO)*

Saudi Arabia, Turkey, Egypt and United Kingdom top outbound destinations

- Saudi Arabia
- Turkey
- Egypt
- United Kingdom
- Qatar
- Jordan
- United States of America
- Iran, Islamic Republic of
- Thailand
- Switzerland
- Lebanon
- Morocco
- Bosnia and Herzegovina
- Malaysia
- India

Characteristics of outbound travellers *(UNWTO and ETC)*

- Mainly in the age group of 16–44 years
- More males than females
- Millennial generation constitutes a growing segment
- The majority of Kuwaiti travellers are married and travel on holiday with family

Purpose of travel *(UNWTO and ETC)*

- Leisure is the primary purpose of overseas travel
- Business travel accounts for over one-tenth of all trips
- Equal number of Kuwaitis travel abroad for religious purposes
- Medical tourism, sports-related tourism and other reasons for travel account for less than one-tenth of all outbound travel

Information sources *(UNWTO and ETC)*

- Kuwaiti travellers are increasingly turning to the Internet for travel information and trip planning, even as friends and family remain key sources of information and influence in holiday planning and destination decision making
- Social networks, search engines, online videos and maps are the key online sources for travel planning and research

Booking *(UNWTO and ETC)*

- Travel agencies important
- But there is increasing trend of online booking for flights, hotels and other travel-related services

Travel agencies *(UNWTO)*

- All travel agencies are members of the Kuwait Travel & Tourism Agencies Association (KTTA)
- The largest travel companies: Alghanim Travel, Al-Mulla Travel Bureau, Al Sayer Travels, Barakat Travel, Boodai Aviation Group, Destinations of the World, Al Riyadh Travels, Al Shamel Travel & Tourism and Behbehani Travel Bureau

Travel frequency *(UNWTO and ETC)*

- Kuwaitis are frequent travellers
- On an average, about six in ten Kuwaiti travellers take one holiday in the year, while 18% take two vacations and another 24% travel three or more times a year

Seasonality *(UNWTO and ETC)*

- As in other Gulf countries, the period from July to September is the main travel season for Kuwaiti residents

Length of stay *(UNWTO and ETC)*

- Kuwaitis spend the longest time on trips overseas compared to other GCC nationals
- The average length of stay is higher in Europe than in other parts of the world
- The length of stay in Europe during the summer season ranges between three weeks to one month in destinations such as the United Kingdom, Germany, Switzerland and Austria
- London and Turkey are also selected for short vacations, ranging between three to ten days

Accommodation *(UNWTO and ETC)*	
	○ The majority prefer to stay in five star and four star hotels or furnished apartments/villas

Activities on leisure trips *(UNWTO and ETC)*	
	○ Shopping ○ Sightseeing/visiting tourist attractions ○ Dining out ○ Visiting museums ○ Attending concerts/plays/musicals ○ Families travelling with children enjoy going on picnics, visiting amusement/theme parks, going to the beach/seaside and visiting other child-friendly locations/attractions ○ Among the younger travellers (males in particular), participating in sporting activities and experiencing popular sporting events is a key desire and motivation to visit foreign locations, with the increasing demand for adventure experiences

SAUDI ARABIA

Holiday/destination research and choice

Participation in tourism

28,898,000 Saudi Arabian citizens participated in outbound trips in 2017

Participation in outbound tourism by year *(Saudi Arabia: Country-specific: Basic indicators (Compendium) 2012 - 2016 (09.2017))*

Year	N
2013	22,535,000
2014	22,323,000
2015	25,054,000
2016	28,898,000

Top outbound tourism destinations in 2016 *(UNWTO)*

Bahrain and Kuwait most popular outbound destinations

- Bahrain
- Kuwait
- Qatar
- Jordan
- Turkey
- Egypt
- United States of America
- Indonesia
- United Kingdom
- Italy
- Switzerland
- Malaysia
- Morocco
- Austria
- India

Characteristics of outbound travellers *(UNWTO and ETC)*

- More males than females
- The majority in the age group of 25–44 years
- Millennial generation (those born between 1980 and 2000) constitutes a growing segment
- Well-educated
- The majority are married and have children in the household
- Travellers to Europe tend to be better educated and have higher incomes compared to the average international traveller

Purpose of travel *(UNWTO and ETC)*

- Outbound travel from Saudi Arabia is driven by leisure travel, followed by visiting friends and relatives (VFR) travel
- Travel for medical treatments is increasingly popular

Information sources *(UNWTO and ETC)*

- Apart from advice and recommendations from friends and family, Internet is the number one source for travel information and trip planning for more than a third of leisure travellers
- Saudi leisure travellers rely on social networks and search engines, as well as online videos and maps as the main online sources for travel planning and research
- Travel agent is still very important, but booking.com and other online distribution channels are increasingly being used

Travel agencies *(UNWTO)*

- Top travel agencies: Kanoo Holidays, Al-Tayyar Travel Group, Attar Travel and the Saudi Travel and Tourism Bureau (STTB)
- Other established players: Elaf Group of Companies, Alfaisaliah Travel & Tourism, Mosaid Travel, Al Zouman and Al Diar

Planning/itinerary behaviors

Travel frequency and seasonality *(UNWTO and UTC)*

- On an average, over six in ten (62%) Saudi residents take one holiday in the year
- The major outbound travel season is during the school summer vacations, extending from the end of June until the beginning of September

Average length of stay

Average length of stay of Saudi Arabian tourists on outbound trips in 2016 was 15,82 days

Average length of stay on outbound trips by year *(Saudi Arabia: Country-specific: Basic indicators (Compendium) 2012 - 2016 (09.2017))*

Year	Number of days
2013	9,25
2014	11,56
2015	13,22
2016	15,82

Accommodation *(UNWTO and UTC)*

- hotels are the most preferred type of accommodation, followed by furnished apartments and private/other types of accommodation

Travel party *(UNWTO and UTC)*

- Holiday travel is family-oriented, with travel groups often including members of the extended family

Activities in destination *(UNWTO and UTC)*

- Shopping
- Sightseeing/visiting tourist attractions
- Dining out
- Going to amusement/theme parks
- Visiting museums
- Attending concerts/plays/musicals

Expenditures on outbound trips

Saudi Arabian tourists on average spent 60,75 € per day on an outbound trip in 2016

Average expenditure per day (in €) on outbound trips by year *(Saudi Arabia: Country-specific: Basic indicators (Compendium) 2012 - 2016 (09.2017))*

Year	€
2013	90,72
2014	65,55
2015	66,20
2016	60,75

SOUTH KOREA

Holiday/destination research and choice

Participation in tourism

South Korean citizens made 22,383,190 departures in 2016

The dominant group in outbound travel are tourists in the age group 31 to 40 years

Departures of Korean in 2016 by age group *(Korea Tourism Organisation)*

Age (years)	N	%
0 to 20	2,705,515	12%
21 to 30	3,825,443	17%
31 to 40	4,408,523	20%
41 to 50	4,156,605	19%
51 to 60	3,632,897	16%
61+	2,115,253	9%
Crew	1,538,954	7%
TOTAL	22,383,190	100%

Outbound trips

South Korean citizens made a total of 15,000,000 outbound trips in 2013

Leisure is dominant motive for outbound trips

China, Japan and USA top outbound destinations

Type of outbound trips in 2016 by purpose *(STB Makret Insights)*

Purpose	%
Leisure	57%
Professional, business	25%
Education	12
Other	7%
TOTAL	100%

Arrivals from South Korea in 2013 *(STB Market Insights)*

Destination	Total trips	
	N	%
China	4,000,000	27%
Japan	2,000,000	13%
USA	1,400,000	9%
Thailand	1,300,000	9%
Philippines	1,200,000	8%
Hong Kong	800,000	5%
Vietnam	800,000	5%
Singapore	500,000	3%
Cambodia	400,000	3%
Taiwan	400,000	3%
Other countries	2,200,000	15%
TOTAL	15,000,000	100%

Outbound trips in 2015 *(HTZ)*

- A total of 19.3 million outbound trips in 2015 *(HTZ)*

Top outbound destinations in 2015 *(HTZ)*

- China (31%)

- Japan (10%)
- USA (4%)
- Hong Kong (3%)
- Taiwan (3%)

Top European destinations for South Korean tourists *(HTZ)*

- France
- Germany
- Spain
- Austria
- Czech Republic
- Switzerland
- Turkey
- United Kingdoim
- Italy
- Hungary
- Russia
- Croatia

Factors in destination choice

Internet popular for booking trips to Europe

The most important factors in destination choice *(HTZ)*

- Safety
- Value for money
- Suitability for family holiday
- Attractiveness of destination
- Natural beauties
- Gastronomic offer

Booking/transaction behaviors

Holiday organization *(https://www.emarketer.com/Chart/Top-10-Online-Travel-Agency-OTA-Websites-South-Korea-Ranked-by-Average-Monthly-User-Session-Visits-Sep-2017-thousands/213353)*

Internet popular for booking trips to Europe

- 30% of outbound trips are organized as package tours
- 42% of trips to Europe booked online *(World Travel Monitor)*

The largest OTA websites in South Korea (by the average number of monthly visits):

- Hanna Tour
- Interpark Tour
- Mode Tour
- Onlinetour.co.kr
- YB Tour
- KRT Tour
- Very Good Tour
- *Webtour.com*

Planning/itinerary behaviors

Travel to Europe

Round trips most dominant type of travel to Europe	**Outbound trips to Europe by type of travel** *(HTZ: ETC)* ○ Round trips (organized or individual; 70%) ○ City breaks (15%) ○ Visiting resorts (10%) ○ Other type of travel (5%) **Outbound trips to Croatia** *(HTZ: eVisitor)* ○ Organized travel dominant (74%) ○ Hotel accomodation most popular (77%)

Expenditures on outbound trips

	Average expenditure per outbound trip to Europe *(HTZ)* ○ 3,625 $

UNITED ARAB EMIRATES

Holiday/destination research and choice

Top outbound tourism destinations in 2016 *(UNWTO)*

Saudi Arabia, United Kingdom, Thailand and Italy top outbound destinations

- Saudi Arabia
- United Kingdom
- Thailand
- Italy
- Qatar
- Switzerland
- Austria
- United States of America
- Kuwait
- Singapore
- India
- Azerbaijan
- Egypt
- Turkey
- Australia

Characteristics of outbound travellers *(UNWTO and ETC)*

- More males than females
- Well-educated
- The majority are married and travel on holiday with family

Purpose of travel *(UNWTO and ETC)*

- Leisure and visiting friends and relatives (VFR) are the main purposes of travel

Information sources and travel associations *(UNWTO)*

- Expedia, Skyscanner, booking.com, hotels.com, cleartrip.com, Trivago, Agoda, Orbitz and TripAdvisor are among the popular sites for United Arab Emirates travellers
- Travel associations: Abu Dhabi Travel and Tourism Agencies Committee (ATTAC), Dubai Tour and Travel Agents Group, Sharjah Travel Agents Association (STAA)
- The main providers of holiday destination products are the airlines through their 'holidays' divisions (e.g. Emirates Holidays, Etihad Holidays, Air Arabia Holidays)

	○ The largest retail travel services company in the United Arab Emirates is Dnata; other prominent travel agents are Orient Travel & Touring Agency (OTTA), Sharjah National Travel & Tourist Agency, Kanoo Holidays, Thomas Cook Al-Rostamani, Al Futtaim Travel and MMI Travel Centre, Omeir Travel Agency, Al Rais Travel, Abu Dhabi Travel Bureau, Airlink International, Al Naboodah Travel and Al Futtaim Travel

Travel frequency *(UNWTO and ETC)*

	○ On an average, one-half of international travellers take one holiday in the year, while 26% take two vacations and another 24% travel three or more times a year

Seasonality *(UNWTO and ETC)*

	○ Largest number of outbound holidays is realized from July to September

Length of stay *(UNWTO and ETC)*

	○ United Arab Emirates travellers tend to spend between 2–6 weeks on a holiday overseas ○ The average length of stay is higher in Europe than in other parts of the world

Accommodation *(UNWTO and ETC)*

	○ Four and five star hotels are most preferred for family travels ○ Large family groups also opt for furnished apartments and villas, and there is an increasing preference for luxury accommodation

Travel party *(UNWTO and ETC)*

	○ Holiday travel is family-oriented, with travel companions often including members of the extended family

Activities on leisure trips *(UNWTO and ETC)*	
	○ Shopping ○ Sightseeing ○ Dining and entertainment ○ Meeting up with family and friends ○ cruise trip ○ spa

United States of America

Holiday/destination research and choice

Participation in tourism

The dominant group in outbound travel are tourists in the age group 45-64 years

Participation in tourism in 2013 by age group *(Tourism Development International)*

Age (years)	%
18 to 30	22%
31 to 44	30%
45 to 64	38%
65 and over	10%
TOTAL	100%

- An average of 2.6 outbound trips realized by US citizens in 2015

Outbound trips

Mexico, Canada and United Kingdom top destinations

- 46% of outbound trips generated by residents of Kalifornia, Texas, Florida and New York

Number of outbound travelers in 2016 by country of destination *(National travel & tourism office)*

Destination	Total travellers N	Total travellers %
Mexico	31,194,000	39%
Canada	13,895,000	17%
United Kingdom	3,197,000	4%
Dominican Republic	2,706,000	3%
Italy	2,214,000	3%
France	2,178,000	3%
Germany	1,968,000	2%
Jamaica	1,476,000	2%
Spain	1,405,000	2%
China	1,300,000	2%
India	1,195,000	1%
Costa Rica	1,124,000	1%
Other countries	16,374,000	20%
TOTAL	80,226,000	100%

Main trip purpose in 2015 *(National travel & tourism office)*

Main trip purpose vacation/holiday

- Vacation/holiday (55%)
- Visiting family/friends/relatives (VFR) (27%)
- Business (8%)
- Education (4%)
- Convention/Conference/Trade Show (4%)
- Religion/Pilgrimages (3%)
- Health Treatment (1%)

Leading Activities of United States Travellers Visiting Overseas Destinations 2012 *(Tourism Development International)*

Sightseeing main activity during trip

Leisure/recreational activities	All United States travellers	Leisure & VFR Travellers	Business & convention travellers
Sightseeing	78%	81%	67%
Shopping	76%	78%	67%
Small Town/Countryside	43%	46%	28%
Experience Fine Dining	41%	42%	44%
Historical Locations	40%	42%	29%
Guided Tours	35%	37%	19%
Art Galleries/Museums	33%	35%	26%
Cultural/Ethnic Heritage Sites	31%	33%	23%
National Parks/Monuments	28%	30%	19%
Nightclub/Dancing	26%	27%	18%
Water Sports	18%	21%	7%
Concert/Play/Musical	14%	15%	10%
Amusement/Theme Parks	10%	11%	6%
Casino/Gamble	9%	10%	5%
Camping/Hiking	8%	8%	4%

Importance of travel needs 2013 *(Tourism Development International)*

Authentic experience in destination is the main travel need

- authentic experiences in new destinations (75%)
- rest and relaxation (68%)
- desire to spend time with/reconnecting with loved ones (48%)
- personal enrichment e.g. voluntourism, cultural experience, learning, etc. (43%)
- discovering new experiences in previously visited destinations (24%),
- adventure (24%)

Information sources for trip planning 2016 *(National travel & tourism office)*

Airlines most important sources of information

- airlines (53%)
- online travel agencies (OTA) (33%)
- personal recommendation (22%)
- conventional travel agencies (17%)
- corporate travel dept (8%)
- tour company/travel club (8%)
- travel guide (7%)
- other (6%)

Booking/transaction behaviors

Methods used to book holiday in 2016 *(National travel & tourism office; https://www.statista.com/statistics/460012/online-travel-agency-market-share-us/; https://www.statista.com/statistics/269130/monthly-visits-to-travel-portals-in-the-us/)*

Airlines services most popular for booking

- directly through the airlines (40%)
- Internet booking service (33%)
- travel agency (17%)
- company travel department (8%)
- tour operator/travel club (6%)
- other (3%)

The largest online travel agencies (by the market share):
- Expedia
- Orbitz
- The Priceline Group
- Travelocity
- Cheapoair

The largest travel portals (by the average number of monthly visits):
- TripAdvisor
- Hotels.com
- Booking.com
- Expedia
- Airbnb

Travel arrangements in 2013 *(Tourism Development International)*

USA tourists usually travel independently

- 49% independently
- 21% partially or fully guided trip
- 16% cruise
- 14% all-inclusive resort

Planning/itinerary behaviors

The number of destinations visited in 2016 *(National travel & tourism office)*

USA tourists usually visit one destination during their trip

- one destination visited (57%)
- two destinations visited (23%)
- three or more destinations visited (20%)
- an average of 1.8 destinations visited per trip

Travel party 2016 *(National travel & tourism office)*
Multiple response.

USA tourist usually travel alone

- 62% travelled alone
- 23% travelled with a spouse or partner
- 13% travelled with family/relatives
- 5% travelled with friends
- Other (2%)

The most important determining factors in choosing a vacation in 2013 *(Tourism Development International 432)*

Ordered by importance

The most important factor in choosing a destination is the destination itself

- The right destination
- Value for money paid
- Once-in-a-lifetime experiences
- The activities available
- Price

Expenditures on outbound trips in 2016 *(National travel & toursim office)*

American tourists on average spent 1,464 $ per outbound trip

Category	Amount
Per Travel Party	2,327 $
Per Visitor	1,464 $
Per Visitor Per Day	85 $