The Japanese, Chinese and US markets

Brussels, July 2023

1. Arrivals Growth to Europe

Source: ETC - European Tourism: Trends & Prospects Quarterly Report (Q2/2023).
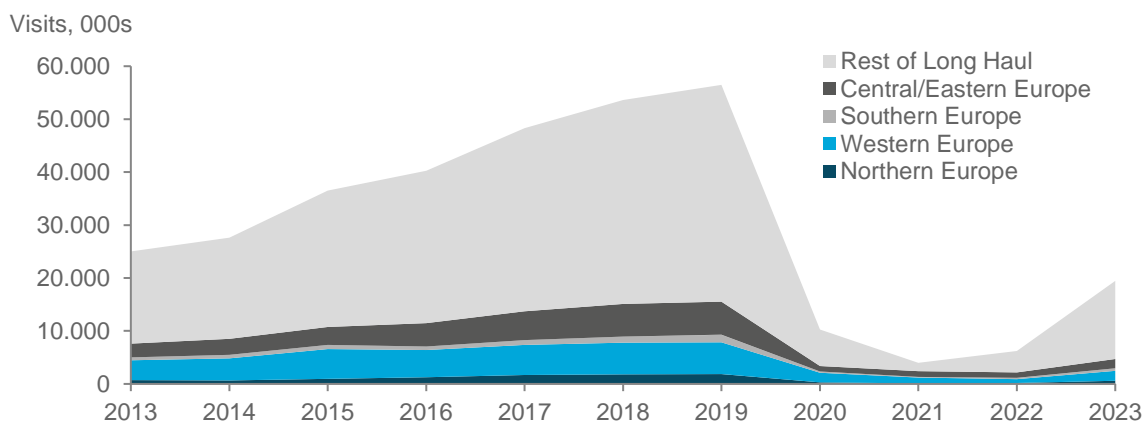
China Market Share Summary

	2022		Growth (2022-27)			Growth (2017-22)	
	000s	Share**	Annual average	Cumulative growth*	Share 2027**	Cumulative growth*	Share 2017**
Total outbound travel	**9,750**	**–**	**69.5%**	**1298.9%**	**–**	**–89.5%**	**–**
Long haul	6,242	64.0%	63.3%	1060.2%	53.1%	–87.1%	51.9%
Short haul	3,508	36.0%	78.7%	1723.7%	46.9%	–92.1%	48.1%
Travel to Europe	**2,182**	**22.4%**	**50.4%**	**669.8%**	**12.3%**	**–84.1%**	**14.7%**
European Union	2,342	24.0%	30.2%	274.2%	6.4%	–64.8%	7.2%
Northern Europe	158	1.6%	69.9%	1315.4%	1.6%	–90.5%	1.8%
Western Europe	746	7.7%	53.8%	759.5%	4.7%	–86.9%	6.1%
Southern Europe	247	2.5%	39.2%	422.1%	0.9%	–72.6%	1.0%
Central/Eastern Europe	1,030	10.6%	46.1%	565.2%	5.0%	–81.1%	5.8%

*Shows cumulative change over the relevant time period indicated. 2017-22 includes COVID-19 pandemic related declines.

**Shares are expressed as % of total outbound travel

Source: Tourism Economics

China Long Haul* Outbound Travel

Visits, 000s

*Long haul defined as tourist arrivals to destinations outside Northeast Asia
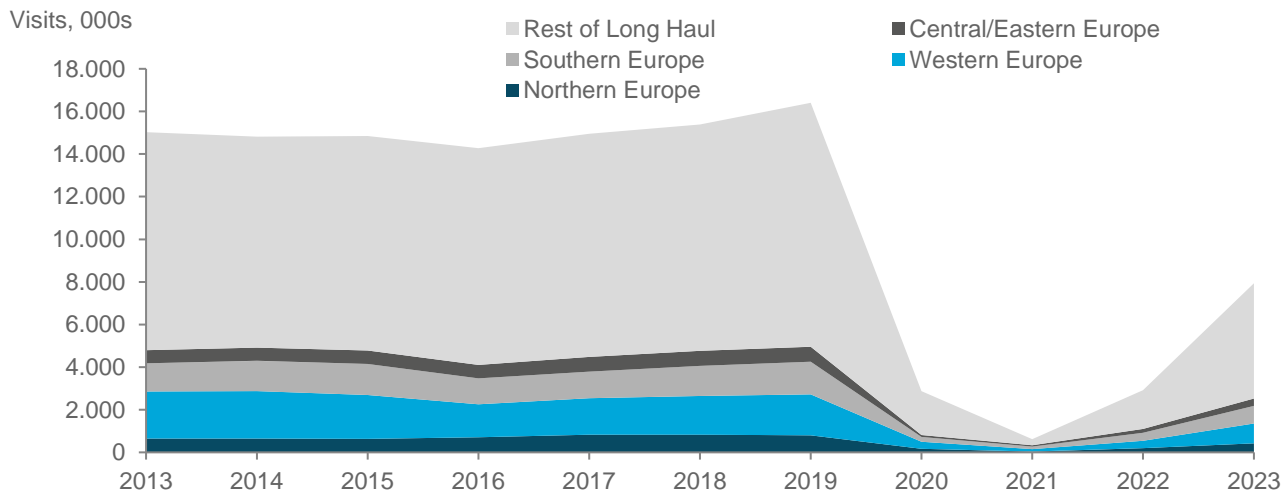
Source: Tourism Economics

Japan Market Share Summary

	2022		Growth (2022-27)			Growth (2017-22)	
	000s	Share**	Annual average	Cumulative growth*	Share 2027**	Cumulative growth*	Share 2017**
Total outbound travel	**3,587**	**–**	**55.6%**	**811.3%**	**–**	**-84.3%**	**–**
Long haul	2,917	81.3%	48.4%	618.6%	64.1%	-80.5%	65.4%
Short haul	669	18.7%	77.3%	1651.2%	35.9%	-91.5%	34.6%
Travel to Europe	**1,093**	**30.5%**	**41.1%**	**458.7%**	**18.7%**	**-75.6%**	**19.6%**
European Union	758	21.1%	42.7%	491.3%	13.7%	-82.2%	18.7%
Northern Europe	198	5.5%	34.8%	345.4%	2.7%	-76.2%	3.6%
Western Europe	350	9.8%	46.9%	583.2%	7.3%	-79.6%	7.5%
Southern Europe	368	10.3%	36.9%	380.6%	5.4%	-70.5%	5.5%
Central/Eastern Europe	177	4.9%	43.2%	501.3%	3.3%	-73.9%	3.0%

*Shows cumulative change over the relevant time period indicated. 2017-22 includes COVID-19 pandemic related declines.

**Shares are expressed as % of total outbound travel

Source: Tourism Economics

Japan Long Haul* Outbound Travel

*Long haul defined as tourist arrivals to destinations outside Northeast Asia

Source: Tourism Economics

United States Market Share Summary

	2022		Growth (2022–27)			Growth (2017–22)	
	000s	Share**	Annual average	Cumulative growth*	Share 2027**	Cumulative growth*	Share 2017**
Total outbound travel	**103,656**	**–**	**8.8%**	**52.5%**	**–**	**–8.4%**	**–**
Long haul	53,823	51.9%	12.4%	79.7%	61.2%	–20.6%	59.9%
Short haul	49,833	48.1%	4.3%	23.2%	38.8%	9.9%	40.1%
Travel to Europe	**28,289**	**27.3%**	**9.8%**	**59.5%**	**28.5%**	**–11.2%**	**28.2%**
European Union	6,111	5.9%	42.8%	493.7%	22.9%	–73.6%	20.5%
Northern Europe	8,155	7.9%	7.0%	40.3%	7.2%	–4.3%	7.5%
Western Europe	8,774	8.5%	9.8%	59.4%	8.8%	–19.1%	9.6%
Southern Europe	8,635	8.3%	10.7%	65.9%	9.1%	–1.8%	7.8%
Central/Eastern Europe	2,725	2.6%	14.5%	96.8%	3.4%	–26.1%	3.3%

*Shows cumulative change over the relevant time period indicated. 2017–22 includes COVID–19 pandemic related declines.

**Shares are expressed as % of total outbound travel

Source: Tourism Economics

United States Long Haul* Outbound Travel
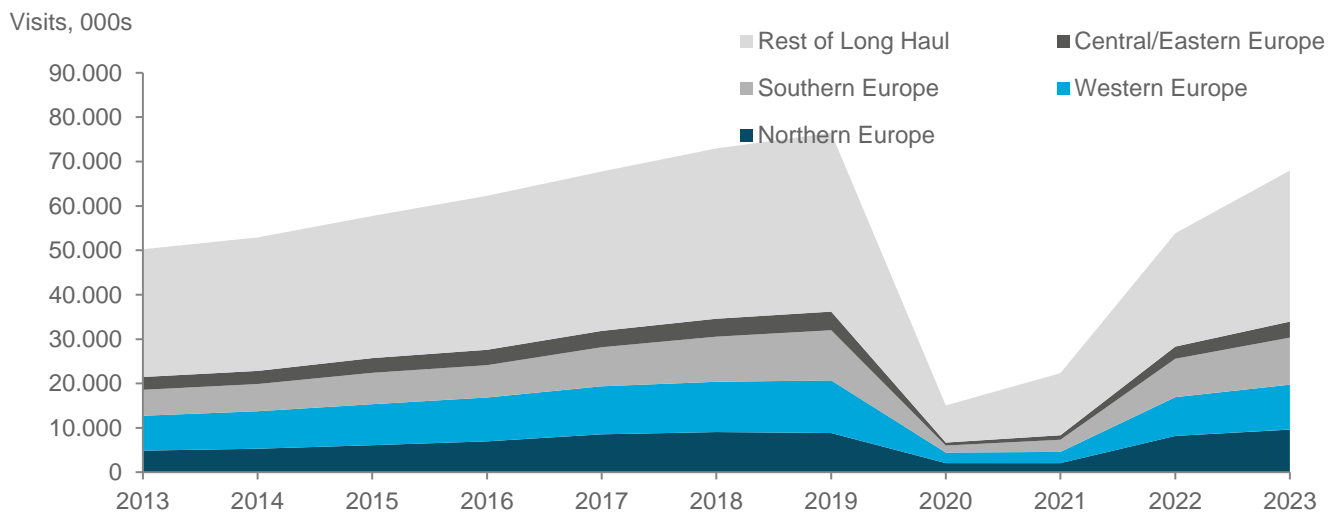
*Long haul defined as tourist arrivals to destinations outside North America
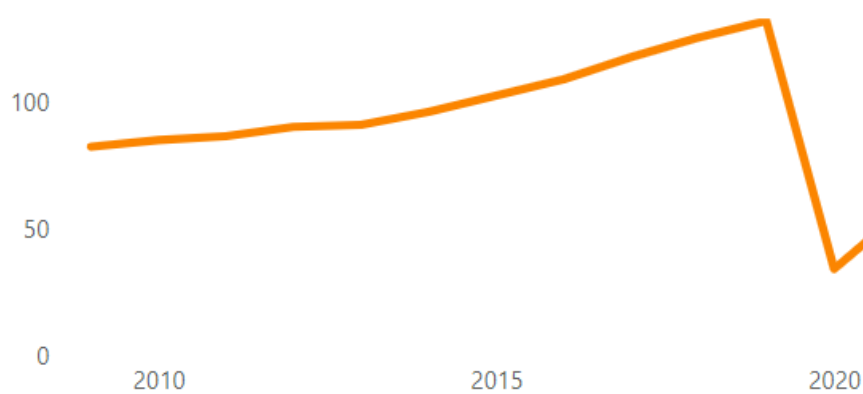
Source: Tourism Economics

2. Expenditure

US

Global Tourism Expenditure: the US (In USD billion)							
2015	2016	2017	2018	2019	2020	2021	2022
102,7	109,2	117,9	125,7	132,3	34,4	56,9	114,9

International tourism expenditure (USD billion)

Expenditure per Departure: the US (US dollars)							
2015	2016	2017	2018	2019	2020	2021	2022
1384	1361	1345	1350	1326	1020		

Expenditure per departure (USD)
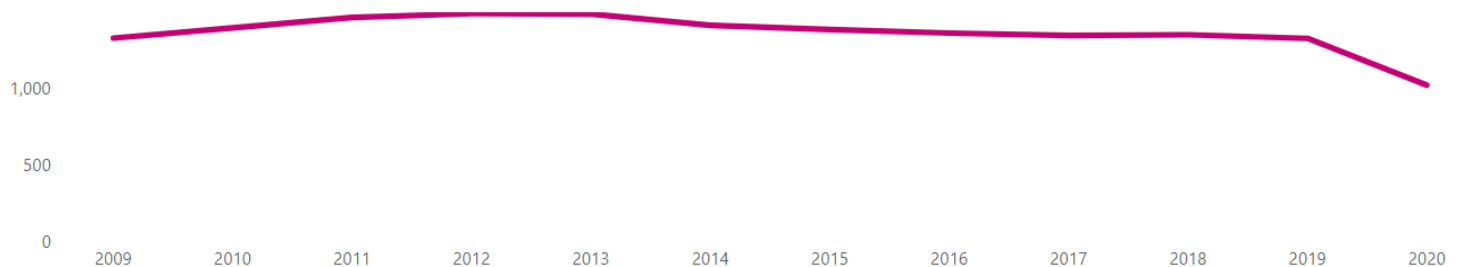
China

Global Tourism Expenditure: China (in USD billion)							
2015	2016	2017	2018	2019	2020	2021	2022
249,8	250,1	257,9	277,3	254,6	131,1	109,4	114,8

International tourism expenditure (USD billion)
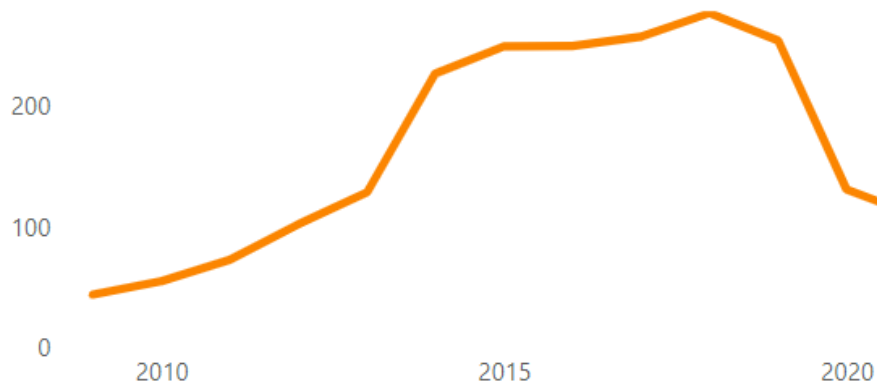
Expenditure per Departure: China (in US Dollars)							
2015	2016	2017	2018	2019	2020	2021	2022
1954	1851	1803	1852	1647	6445		

Expenditure per departure (USD)
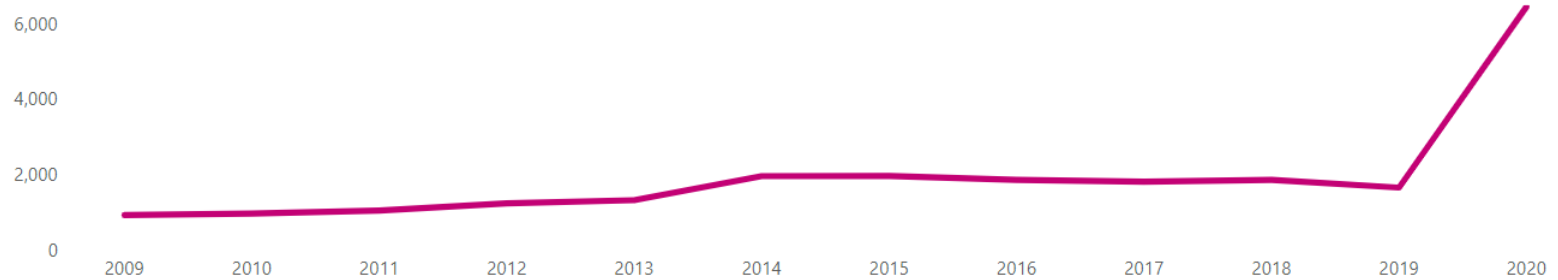
Japan

Global Tourism Expenditure: Japan (in USD billion)							
2015	2016	2017	2018	2019	2020	2021	2022
16	18,5	18,2	20,2	21,3	5,5	2,8	3,7

International tourism expenditure (USD billion)
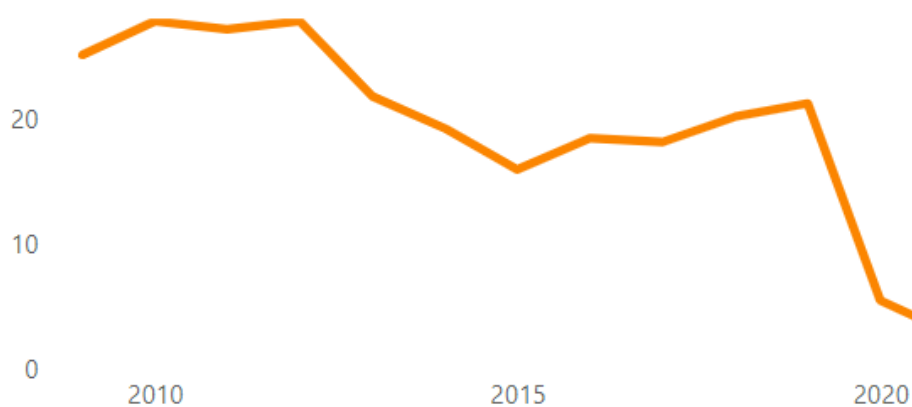
Expenditure per Departure: Japan							
2015	2016	2017	2018	2019	2020	2021	2022
985	1080	1017	1067	1059	1733		

Expenditure per departure (USD)

- Looking at the upcoming Summer period (May-September), travellers from USA, Japan and China anticipated the following daily budgets (the budget shows expenditure per person and includes accommodation, food and activities – flight tickets to Europe are not included):

DAILY BUDGET*

■ Less than 100 € ■ 200-100 € ■ More than 200 € ■ Don't know

	Less than 100 €	200-100 €	More than 200 €	Don't know
USA	25%	35%	30%	11%
JAPAN	23%	31%	20%	26%
CHINA		25%	69%	2%
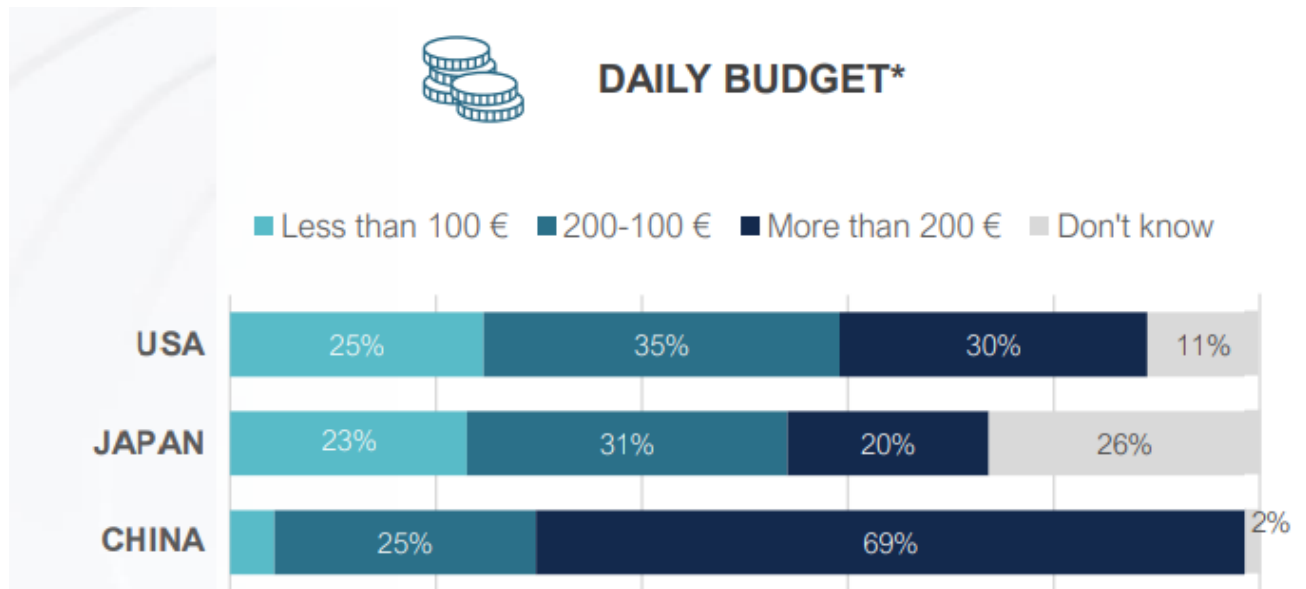
- Most respondents planning to visit Europe anticipate spending more than 100€ per day, including accommodation, food, and other activities. Notably, Chinese travellers demonstrate a significantly higher intended daily budget, with most respondents (69%) planning to spend over 200€ daily.

3. How many countries visited in Europe

Source: ETC - [Tracking Multi-Destination Travel in Europe from Long-Haul Source Markets](#)

Although this report is from 2018, it still demonstrates some interesting findings:

- The average number of visited countries was:

    o   2.2 for Chinese travellers

    o   1.9 for Japanese travellers

    o   2.3 for US travellers

- "Travellers who visit more destinations during a trip tend to spend more money in total and less money per destination. The spending per night tends to be slightly lower among travellers who combine many city level destination". (p.8)

Source: ETC - [Long-Haul Travel Barometer 2/2023](#)

When asking about respondents preferred destinations for the upcoming summer of 2023 (May-September) respondents mentioned:

- Chinese respondents mentioned on average 3.9 countries for their next trip. The top five were: France, Germany, Italy, Denmark and Switzerland.

- US respondents mentioned on average 2.9 countries for their next trip. The top five were: France, Italy, UK, Germany, Spain.

- Japanese respondents (with a very low sample size) mentioned on average 2.8 countries for their next trip. The top five were: France, Germany, Italy, UK, and Spain