

Overview of the US Travel Market

Presented by DQMPR, December 2016



2016 Public Relations Activity Snapshot

- Total of 81 articles with a tourism angle
- Total Print Circulation: 6,570,378
- Total Online Readership: 592,632,498
- Estimated Advertising Equivalent: \$428,302,587.98



the WAYFARER



Love Barcelona? Try Malaga. PHOTO BY JEREMY HERTMAN/FILICAN

Been There, Seen That: Alternatives to Europe's Biggest Cities

Where to go in Europe, once you've explored Berlin, Rome, Barcelona and more.

BY ANDREW RICHDALE 12.2.2016 FROM THE JANUARY/FEBRUARY 2017 ISSUE

If You Like Rome ...

Visit Parma, Italy

UNESCO recently named the birthplace of Parma ham and Parmesan cheese the world's first Creative City of Gastronomy.

What to do: Enjoy langoustines and shrimp beignets at F.I.S.H.I. Sample salami at the market near Strada Matteo Renato Imbriani. Drink your fill of the local lambrusco. And to ...

Cremeria Emilia | **DUJOUR** NEWSLETTER

NEWS STYLE BEAUTY CULTURE LIFESTYLE DESIGN REAL ESTATE

Stay at: Stay at H... shrine to cured m...

Book a Stay at a Castle Hotel

Editorial recommendations for a stay written by Rachel Barber. Castello di Compagno, Parma, Italy. This magnificent Italian castle is home to three different museums—the Museo Marelli, Food and Wine Museum and the Marchionni Rooms. Guests can stay in suites named for the nobility that owned or bought the castle, trace its construction during the 16th century. The castle has a rich history, functioning as a fortress, a prison and a boarding school before becoming a retreat.

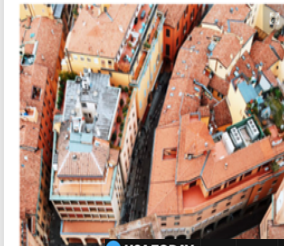


Top Pitching Results

BAZAAR

27 PHOTOS THAT PROVE ITALY IS HEAVEN ON EARTH

These beautiful places of one of the world's most romantic destinations will inspire some serious wanderlust.



Bologna, Emilia-Romagna

Located about halfway between Venice and Florence, Bologna gets its nickname, *La Rossa* (the red one), from the ubiquitous terracotta buildings in the medieval city center.

What's new at European museums this spring



Italy's Ferrari Museum pays homage to the films and television shows that gave the iconic cars starring roles in its Red Carpet Exhibition. Museo Enzo Ferrari Modena



Italy's Ferrari Museum will play clips of the vehicles in action paired with the actual car models at its exhibit dedicated to Ferraris on film. Museo Enzo Ferrari Modena

The Boston Globe

From boutique B&B to bluetooth speakers



Nobnocket Boutique Inn

By Neece Regis | GLOBE CORRESPONDENT MAY 20, 2016

MOTOR VALLEY LAUNCHES WEBSITE

Speaking of exotic Italian cars, the Emilia Romagna Tourism Board invites visitors to discover Italy's long automotive history with the launch of the newly redesigned and easy-to-use website, MotorValley. Located in Northern Italy, the Motor Valley — as it is affectionately called — is home to a world of automotive titans including Ferrari, Lamborghini, Ducati, Pagani, 11 private collections of historic vehicles and 14 museums devoted to ultimate driving machines, including the Ferrari Museum of Maranello, the newest museum dedicated to Enzo Ferrari in Modena, and the Ducati and Lamborghini Museums near Bologna. Visitors to the website will find one-to-four-night tour packages and special offers that celebrate the region, pairing car factory tours with gastronomic experiences, legendary races, spa excursions, and shopping expeditions. www.motorvalley.com

Top Press Trip Results

The Boston Globe

A medieval Italian village, a taste of the past



La Mela Verde shop owner Beatrice Guaducci makes pasta, breads, and more in Brisighella, Italy.

By Necee Regis | GLOBE CORRESPONDENT MAY 31, 2016

BRISIGHELLA, Italy — In the Emilia-Romagna region of Italy, the medieval village of [Brisighella](#) takes the concept of locally grown products to heart. After a taxi driver in nearby Ravenna touted an ice cream shop here, I scheduled time for a breakfast-cone detour en route to the airport in Bologna. I had no name for the shop, and only sketchy directions: “Walk up the hill near the park.” The town is small, population about 3,700, with a castle dating back to the 14th century. How hard could it be to find an ice cream shop?

On the quiet stone streets on a weekday morning, I was easily distracted — you might also be by the visual and aromatic delights presented by storefront shops with doors flung open. In season was fall, and La Mela Verde vegetable and fruit market overflowed with varieties of tomatoes, apples, and pears. There was *abbonanza*, a rosy-red acidic apple; *angeleno*, a sugary-sweet plum; and the round *pera volpina*, a small pear with the coloring of a Bosc. The shopkeeper handed me *sorba*, a crabapple-size fruit, and encouraged me to try. It had a tannic wine flavor unlike any other fruit I have tasted, and she explained the shop sells what villagers call

MAXIM



ITALIAN RENAISSANCE

Cruise through vineyards on a Ducati, ski an Alpine glacier and set sail in Sardinia on an Italian adventure that forgoes the standard issue itinerary in favor of la dolce vita

Curated by LINDSAY SILBERMAN Text by ALEXANDRA KIRKMAN

CONDÉ NAST Traveler At Home in the World

TRAVEL INSPIRATION • CULTURE



Seeking Fellini, Ferrari, and the Perfect Parmigiano in Emilia Romagna, Italy

By Alexandra Kirkman • February 1, 2016



Getty

A sunset over Tiberius Bridge in Rimini, Italy.

Though often overlooked for more popular regions, Emilia Romagna has a can't-miss collection of culture, cuisine, and personality.

While Italian tourism mainstays like Tuscany's bucolic hills and the Amalfi Coast's glittering hamlets tend to garner more headlines and visitors, the country's comparatively unsung Emilia Romagna region is its most popular leisure destination as measured by average number of nights stayed, attracting nearly nine million tourists each year. Steeped in history and gastronomy and bordered by the Po River to the north and the Apennine Mountains to the south, Emilia Romagna is home to rarefied car-racing brands including Ferrari, Maserati, and Lamborghini, and the birthplace of such exalted Italian sons as Giuseppe Verdi, Luciano Pavarotti, Federico Fellini, and Giorgio Armani.

With nine provinces, the region offers plenty to do, from 10 "art cities" to 15 ski resorts. But where to


Overview of the US Travelers: Who Are They?




**Overseas Travel: +6.5%
32.8 million Americans**

US Travelers by Race:
59% White
16% Asian
15% Hispanic
8% Black
2% Native Am./Alaskan or Hawaiian Islander

Average HHI: \$125,000
HHI +\$300,000: 7%



50.3% of US Travelers
Average Age: 43.5 yrs



49.7% of US Travelers
Average Age: 45 yrs



Overview of the Travelers to Europe: Travel Planning

Information Sources Used (multiple responses)	2014 (Percent)	2015 (Percent)	Point Change⁽²⁾
Airline	51.9	52.9	1.0
Online Travel Agency	31.7	31.8	0.1
Personal Recommendation	19.0	20.6	1.6
Travel Agency Office	16.1	13.9	-2.2
Tour Operator/Travel Club	10.6	10.8	0.2
Corporate Travel Department	10.1	9.4	-0.7
Travel Guides	9.2	9.3	0.1
National/State/City Travel Office	3.5	3.5	0.0
Other	6.5	6.3	-0.2



Overview of the Travelers to Europe: Origin Location

Residence of U.S. Travelers ⁴	Market Share 2014 (Percent)	Volume 2014 (000)	Market Share 2015 (Percent)	Volume 2015 (000)
STATES & CITIES				
California	14.0	1,513	12.3	1,399
New York	11.0	1,188	10.9	1,240
Texas	7.5	810	8.4	956
New York City	8.2	886	7.9	899
Florida	6.2	670	7.5	853
Massachusetts	4.8	519	5.1	580
Pennsylvania	5.1	551	4.9	558
New Jersey	3.8	411	4.2	478
Los Angeles	4.5	486	3.4	387
Illinois	3.1	335	3.3	375



Overview of the Travelers to Europe: Activities

Activity Participation While in Other Countries (multiple responses)	2014 (Percent)	2015 (Percent)	Point Change⁽²⁾
Sightseeing	87.6	88.1	0.5
Shopping	80.3	81.0	0.7
Historical Locations	60.7	60.7	0.0
Art Galleries/Museums	57.6	58.1	0.5
Small Towns/Countryside	57.7	57.2	-0.5
Guided Tours	45.5	45.5	0.0
Experience Fine Dining	45.9	45.3	-0.6
Cultural/Ethnic Heritage Sites	43.7	42.8	-0.9
National Parks/Monuments	36.2	38.4	2.2
Concert/Play/Musical	21.1	20.9	-0.2



Other Regions and PR Agencies

**National and Regional
Tourism Boards are not
active in the US**

**Hotels and Tour Companies
are working with PR
agencies**



SWOT Analysis for Emilia Romagna

Strengths

Bucket List Destination for Americans

Strong Brand Awareness among Travelers

Opportunities

Online sales and travel to Italy expected to grow through 2017

Exchange Rate Against the Dollar Best It's Been in Years

Weaknesses

Low Brand Awareness Despite Universal Recognition of Regional Products

Threats

Crowded, Highly Competitive Market

Potential Acts of Terror

Recent Earthquake Activity



US Travel Following the 2016 Elections

Stock Market at Record High Despite Initial Drop

US Dollar Nearly 1-to-1 with Euro

**Nationalistic Rhetoric Could Encourage Domestic
Travel...**

While Positioning International Travel as Dangerous



Grazie!

If you have any questions...

Katie Papadopoulos, DQMPR

katie@dqmpr.com

