ETC HANDBOOK

TRACKING MULTI-DESTINATION TRAVEL IN EUROPE FROM LONG-HAUL SOURCE MARKETS: US, CHINA, JAPAN AND INDIA

EUROPEAN TRAVEL COMMISSION

STUDY ON TRACKING MULTI-DESTINATION TRAVEL IN EUROPE FROM LONG-HAUL SOURCE MARKETS – US, CHINA, JAPAN AND INDIA

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ETC Market Intelligence Report

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Table of contents

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Foreword

In the recent decades, multi-destination travel in Europe has become increasingly popular among a wide share of overseas visitors. Today's travellers are looking to maximise the benefits of their experiences by combining share visits to two or more destinations which would be hard to achieve in a single destination trip. The flexible visa regimes, improved air connectivity and technological advances have made Europe a well-suited destination for multi-destination tourism.

While each European destination has its own history, culture and natural features, it is the combination of countries that can provide visitors with the greatest set of experiences. In the light of the growing interest of overseas travellers in visiting multiple European destinations in one single trip, the European Travel Commission (ETC) is pleased to deliver a study that investigates multi-destination travel patterns of travellers from four key long-haul markets: China, India, Japan, and the United States.

The report aims to deliver a nuanced understanding of long-haul tourists' movements in Europe to ETC members, the 33 National Tourism Organisations of Europe. The study identifies thirteen clusters of destinations that are typically part of the same itineraries and describes their seasonal profiles, attractiveness and associated themes. The research delves into multi-destination travellers' needs, preferences and behaviours and provides strategic recommendations to European destination on how to leverage the country-clusters identified for joint marketing and promotional actions. Insights are meant to encourage also local tourism authorities and product providers to engage in cross-border cooperation.

Dr. Peter De Wilde
President,
European Travel Commission

Executive summary

This study investigates multi-destination travel patterns of travellers from four key long-haul markets (China, India, Japan, and the U.S.) through a combination of desk research, a survey, and data mining. Findings are intended to help European tourism organisations identify synergies and collaboration opportunities.

Multi-Destination Travel and the European Tourism Sector

The combination of contrasting but well-connected countries is one of Europe's top advantages in the eyes of overseas travellers. To fully experience the variety, travellers need to make a multi-destination trip. This is a predominant form of inbound tourism: 92% of travellers from China, India, Japan, and the U.S., who were surveyed as part of this study, combined several city-level destinations last time they visited Europe. 60% combined more than one country. (1.1)

Multi-destination travelling in Europe is not a new phenomenon. 'Grand tours' and Interrailing are examples of travel concepts that have been prominent during the last centuries. **A main trend is that multi-destination travelling in Europe is becoming accessible to increasingly broad segments of the world's population**, notably including the growing middle classes in emerging markets such as China and India. Other trends include a shift from group travel to individual travel, a shift from combining the 'best of Europe' to immersion in a region, and a rise of themed travel. Cross-border travel is simultaneously facilitated through improved air connectivity, new online trip-planning tools, and an emerging 'peer to peer' economy, as well as through the Schengen agreement which allows travellers to visit 26 European countries without separate visas or passport checks. (1.2)

Opportunities for the tourism sector presented by multi-destination travel include that smaller destinations can become more relevant as parts of multi-destination routes, that clusters of less well-known destinations can increase their visibility when marketed jointly as a route, and that the pressure on the most popular destinations can be reduced as visitors are dispersed over a larger region. Joint marketing and joint multi-destination products are main areas for collaboration. A major opportunity when collaborating across a national border lies in leveraging synergies that have been neglected due to nation-oriented mindsets and organisational structures. (1.4)

Survey of multi-destination travellers

A survey of travellers from China, India, Japan, and the U.S. shows that **getting variation is the most common reason for visiting multiple destinations** during a trip to Europe. Saving money is more important as a reason in Japan than in the other three markets, and more important to solo travellers than to those travelling together with others. Visiting multiple destinations to cater to different opinions within a group is more important among respondents born after 1990 than among older respondents, and more important in India compared to the other markets. (2.1)

The typical multi-destination tour combines three city-level destinations (except in India, where the typical tour includes five city-level destinations). The average number of visited countries is 2.2 in China, 2.4 in India, 1.9 in Japan, and 2.3 in the U.S. (2.2)

54% of multi-city travellers and **58%** of multi-country travellers **combined different themes and activities** during their trip. In India, however, a majority focused on one theme. Women are more likely than men to have combined different themes, and older respondents are more likely than younger to have done so. (2.3)

Fully independent trip-planning is most common on the U.S. market. Getting support from a travel agency (without joining a group) is most common on the Indian market, while joining tour groups is more common in China and Japan than in India or the U.S. **Travellers who planned their trips wholly on their own tend to have visited fewer city-level destinations than others.** (2.4)

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 destinations.** (2.5)

Trips combining more destinations tend to be longer in time, but with less time spent on each destination. (2.6)

Experiencing local lifestyle is more important for travellers combining many countries during a trip, while shopping and dining are more important for those visiting fewer countries. (2.7)

Spatial patterns of multi-destination travel in Europe

A data mining study based on 4 million online travel reviews has been conducted to get a detailed image of the itineraries used by multi-destination travellers from China, India, Japan, and the U.S. The analysis shows that a high concentration of trips take place within and around France and Switzerland. (3.1)

The analysis also shows how large shares of trips to a specific country also include other specific countries. Maps and tables with these numbers have been compiled from the perspective of each of ETC's member countries as well as France, Sweden, and the U.K. (3.2 and Annex)

Countries are connected to each other in different ways. (3.2.1) Observations from a network analysis of 250 cities include that…

- Central Europe is an especially well-integrated region.
- Germany is particularly well-connected to its neighbouring countries, with many links from German cities to cities in other countries.
- Three clusters of countries are closely integrated internally, but only loosely connected to the main network of destinations:
  - The countries on the Balkans
  - Greece and Turkey
  - The Nordic and Baltic countries
- Some Spanish regions are more closely connected to regions in neighbouring countries than to the rest of Spain in the trip patterns: towns in the Basque Country are integrated with south-west France, and Santiago de Compostela with Portugal.
- Destinations in Alsace are similarly more closely connected to Germany and Switzerland than to the rest of France.
- **Paris is a central hub** in the network, strongly connected to other major destinations across the continent but largely disconnected from the network of other French destinations. Secondary hubs that have central positions in different regions include Barcelona, Copenhagen, London, Munich, Paris, Prague, and Rome. (3.3)

A factor analysis of the identified trips has identified thirteen cross-border clusters of destinations in different parts of Europe that are typically combined in the same itineraries. (3.4) Different clusters have different seasonal profiles, and thematic variation can to some degree be seen between them. The following clusters has been identified:

- *Western Balkans*: combining southern Croatia's coast with destinations in Bosnia and Herzegovina, Montenegro, and Slovenia.
- *Eastern Balkans*: combining inland destinations in Bulgaria and Romania such as Bucharest, Brașov, Plovdiv, and Sofia with side itineraries to Belgrade, Budapest, and Istanbul.
- *Aegean Sea*: centred on Athens and Santorini, which are combined with Turkish destinations including

Istanbul and Cappadocia or Italian destinations including Rome and Florence.

- *Ireland+*: centred on Dublin and other destinations in the south of Ireland, but also incorporating Northern Ireland and London.
- *Britain+*: Edinburgh, London, and Paris make up the backbone of this cluster, which also incorporates destinations across Great Britain.
- *Bavaria+*: combining Munich with other destinations in south-eastern Germany and in Austria, with side tours to Berlin, Paris, and Prague.
- *Central Europe*: combining major destinations in Austria, Czech Republic, Hungary, and Slovakia.
- *Poland+*: centred on Warsaw, Krakow, and towns surrounding the latter, the cluster incorporates destinations across Poland as well as Berlin, Budapest, and Prague.
- *Portugal+*: spanning the Iberian west coast from Lisbon to Santiago de Compostela, which are frequently combined with London.
- *Spain+*: combining destinations in Andalucía and around Madrid with Barcelona, Valencia, and Lisbon. Often combined with Paris.
- *Norway and Scandinavian capitals*: combining Norwegian destinations with the capitals of Denmark and Sweden.
- *The North*: combining destinations in the Arctic region of northern Finland, Norway, and Sweden with Helsinki and Stockholm.
- *The Baltics*: Vilnius, Riga, Tallinn, and Helsinki are the backbone of the cluster, which also incorporates smaller destinations in the three Baltic countries.

Tour packages marketed online in the four studied markets are more focused on a smaller number of main routes compared to the trips identified through reviews. Tour package clusters identified through a separate factor analysis include both regional tours and tours combining major destinations in different parts of Europe. (3.5)

Trip itineraries reported by survey respondents show similar patterns as the review data mining in how strongly different countries are combined with each other. The relative frequency with which different pairs of capitals ('Paris to London', etc.) appear in searches on online search engines are also similar to how often travellers have moved between the same capitals in the trips identified through the reviews. (3.7)

There is a correlation between how easy it is to travel between different cities and how often they are combined in multi-destination trips. Cities between which it is fast to travel by road are more often combined than others, and cities that have a direct air link are more often combined than those that do not. (3.8)

Case studies

An analysis of trip patterns reported by a sample of train travellers holding a **Eurail Pass** from the four studied markets shows a **high concentration of trips within Western and Central continental Europe**. The most travelled trip legs are between major tourism destinations in Italy. Paris is the most visited city, but it is not as central as in the trips identified through data mining of online reviews. Other important nodes in the trips reported by Eurail travellers include Amsterdam and Munich. Trip legs within Switzerland make up a notable share of all reported trip legs, likely due to Switzerland being a classic railway country with good rail connections and many scenic mountain routes. The train trips reported by Eurail travellers have been visualised in the forms of geographic maps and non-geographic networks. (4.1)

Noteworthy cross-border collaboration bodies outside of Europe include the Mekong Tourism Coordinating office and the Regional Tourism Organisation of Southern Africa. In the former, tourism authorities of Cambodia, China, Laos, Myanmar, Thailand, and Vietnam are collaborating with the goals of promoting the region as a single travel destination and developing a sustainable tourism sector. The collaboration includes

several programs, which are executed through the public-private partnership Destination Mekong. One of these is Mekong Moments, an online marketing platform targeting travellers with inspirational visual content from social media platforms and aimed to be a capacity-building tool for providers of tourism products. Other programs include the Mekong Mini-Movie Festival, in which anyone can participate with a one-minute film promoting the region, and the start-up accelerator Mekong Innovative Startups in Tourism. (4.2)

A comparison of single-country and multi-country travellers, contributed by ETC's associate member Sojern, shows that the relative popularity of destination countries differs between these two types of travellers in some markets. Other insights from the comparison include that multi-country travellers are more seldom travelling alone and that the share of multi-destination travel is growing (although the Indian market is an exception to this). (4.3)

Conclusions and recommendations

Tourism organisations and business need to be aware that their **destinations are more likely than not to be just one part of their visitors' trips**. They have several reasons to establish collaborations with partners in other countries, including:

- **Enhanced visibility** as part of a region with marketing collaborations (for smaller destinations)
- **Dispersal of visitors** over a larger area (for countries with on or a few very popular destinations)

Knowing the spatial travel patterns among today's long-haul tourists is a first step towards **finding one's place within established routes and identifying potential partners**. The travel patterns of inbound tourists from China, India, Japan, and the U.S. that are identified in this report can be used by tourism actors in different ways, including:

- **Identifying national-level partners** based on how often countries are combined in the same trips. (Heat maps in Annex.)
- Understanding a country's or a city's position in the network of travel destinations. (Network map in Figure 14.) Is it a central node, or in the periphery? Are there several border regions that are already well integrated with cities in neighbouring countries, or do multi-destination travellers typically arrive through the capital and visit other domestic destinations as side trips? **Connected countries and cities should be considered candidates for collaboration.**
- **If a country or city is included in one of the 13 identified itinerary clusters (see Section 3.4), then the other cities and countries in the cluster should be considered candidates for collaboration.**

Forming cross-border collaborations aligned with established multi-destination travel patterns is a low-hanging fruit once those patterns are known, and joint promotion of existing cross-border routes will contribute to strengthening tendencies that are already in place. An alternative longer-term option is to locate 'holes' in the travel networks, identify the reasons of why some routes are less frequently travelled, and take measures to gradually alter a destination's position in the travel network.

Options for how to build long-term structures for cross-border collaboration include:

- **Forming national-level frameworks for international programs**. (The route taken by the Mekong Tourism framework.)
- **Integrating local or regional cross-border programs as parts of national tourism strategies**.

1. Introductory overview of multi-destination travel

The purpose of this study has been to investigate multi-destination travel patterns of travellers from four key long-haul markets: China, India, Japan, and the U.S. The findings are intended to help European tourism organisations identify synergies and collaboration opportunities, based on spatial information on the movements within Europe of long-haul multi-destination travellers.

The study has taken a mixed methods approach (described in further detail in Appendix):

1. Existing knowledge of multi-destination travel was gathered from previously published research.

2. A survey was conducted with travellers in the four studied markets with recent experience of travelling to Europe. An analysis of responses from travellers whose trips included multiple European destinations was used to give an overview of multi-destination travel behaviour.

3. A big-data analysis of online travel reviews was conducted to reveal patterns in spatial movements during multi-destination trips. Clusters of destinations that are typically combined during one and the same trip were identified through this analysis, as well as statistics on how often each of ETC's member countries is combined with each of the other member countries.

4. Additional analysis was made using other data sources: the survey, online search statistics, marketed travel packages, and train travel diaries provided by Eurail Group G.I.E. Sojern's case study in section 4.3 is based on an analysis of online booking data.

5. Information on existing cases of cross-border collaboration was compiled through desk research and an expert interview.

The report is structured as follows. Chapter 1 gives an overview of multi-destination travel in Europe in a historical perspective and of insights from previous research. Chapter 2 presents the results from a survey of multi-destination travellers. Chapter 3 provides tables, maps, and other figures depicting spatial patterns identified through the analysis of online reviews, which can be used by NTOs and DMOs to understand their position in the network of itineraries and to identify opportunities for collaboration. Chapter 4 contains case studies of several kinds: train trip patterns identified through the analysis of Eurail travel diaries, cross-border collaboration between tourism organisations, and a comparison of single-destination and multi-destination travel patterns based on online booking data contributed by Sojern.

1.1 Multi-destination travel and the European tourism sector

Europe's appeal to overseas visitors lies not only in its rich history and cultural heritage, but also in the fact that different European countries with **contrasting cultures, cuisines, and nature** are located within **close proximity** of each other and are **well-connected** by public transport. Travellers can thereby **gain a lot of experiences** within one and the same trip by **combining multiple destinations**. The ease of doing this means that Europe is a region especially well-suited for multi-destination tourism, with a **competitive advantage** over other regions for developing transnational travel products. Multi-destination trips are also **the predominant form of travelling** for inbound long-haul travellers to the continent; **92%** of travellers from China, India, Japan and the U.S. who were surveyed as part of this study visited multiple towns or cities during their most recent trip to Europe, and **60%** also visited more than one country. (See chapter 2.) There is furthermore a widespread view, for example in Japan, that the **combination of different countries in itself is what makes travelling to Europe attractive**.[1]

However, despite the importance of multi-destination travel, single-country and single-town tourism has long been the norm in the eyes of industry and authorities. This has led to destination marketing organisations (DMOs) and national tourism organisations (NTOs) not reaching the potential they could get from

understanding how individual destinations fit into common multi-destination travel routes, as well as to official statistics being less precise than they could be. (See the Appendix.)

This study aims to bring new insights into patterns and characteristics of multi-destination trips in Europe made by travellers from four source markets: China, India, Japan, and the United States. Chapter 2 provides findings from a survey of multi-destination travellers to Europe from the four markets. Trip patterns identified through an analysis of online data from travel community sites and OTAs are presented in Chapter 3.

1.2 An overview of the evolution of multi-destination travel

Multi-destination tours around Europe is nothing new. In fact, they were popular among affluent travellers as far back as in the 17th and 18th centuries, when 'Grand Tours' around the continent were a ritual mostly for young members of the North-European nobility who desired to become more cultivated through seeing the world.[2] Multi-destination travel in Europe has since become accessible for a much wider audience – notably including increasing shares of the emerging middle classes in countries such as China and India.

1.2.1 More people can afford travelling around Europe

Multi-destination tourism in Europe has, as most types of leisure travel, become **accessible to increasingly broad segments of the world's population**. While the above-mentioned 'Grand Tours' of the 17th and 18th centuries were mostly limited to youths from the European nobility, the second half of the 20th century saw the emergence of widespread multi-destination tourists from other social levels and more parts of the world. For example, Interrail and Eurail passes in the 1970s became highly popular among young middle-class travellers from Western Europe and North America, who typically spent large parts of their summer holidays on loosely planned train tours. In a somewhat similar way as the 'Grand Tours', 'Interrailing' was also a rite of passage for many that meant both freedom and a better understanding of the world through encounters with other countries and cultures.[3]

An important shift that has taken place in recent decades is that multi-destination tourism in Europe has become far less restricted to Europeans and North Americans. Tourists from the growing middle-classes in Asian markets such as China and India today make up a significant share of all travellers to Europe. Multi-destination travel is often more important as more tourists come from long-haul markets, a reason being that combining several destinations in Europe in one trip often means better value for money compared to doing several single-destination trips. The shares of multi-destination trips vary between different long-haul source markets, however.

1.2.2 From group travel to individual travel

When large-scale tourism to Europe first set off, not least on the Asian markets, it primarily took the form of organised group tours. Today, group tours still make up large shares of the Chinese, Indian, and Japanese markets, but the trend is clearly towards more independent travel on all of these.[4] So far, independent travel is most important on the U.S. market, on which just 11.5% of travellers to Europe in 2016 had bought a prepaid travel package[5], but this might change if the trend towards more independent travel continues on the Asian markets.

1.2.3 From 'Best of Europe' tours to immersion in a region

The traditional organised group tours used to cover major tourist attractions across Europe, combining the things you 'must see' on the continent into one condensed trip. This way of travelling is still common, especially among less experienced travellers. Many returning visitors, however, today choose to visit destinations within a smaller region to get a better understanding of its culture or its natural attractions.

Two similar and potentially connected trends can be seen among Chinese travellers, who are…

- …increasingly looking for immersion in the local culture and lifestyle on the destinations that they visit.[6] This is connected to a trend, especially strong on the Chinese market, of seeing personal development and the chance of getting to know other cultures as important reasons to go travelling.[7]
- …visiting fewer and fewer countries per trip. The typical trip among Chinese travellers to Europe in Q1 2017 combined three countries, according to a report by the China Tourism Academy. (This was the number of visited countries for 47% of those travellers.) The shares visiting two countries (15%) or just one country (18%) had however increased by respectively 51% and 88% compared to the same period one year before.[8]

1.2.4 The rise of themed travel

One current trend on the global travel market is that of themed and experiential travel: tourists travelling to experience and learn more about for example history, food and drinks, or nature. This often takes the form of themed tours combining destinations sharing a common theme, and is an example of how multi-destination travel is moving away from 'ticking off' major sights. In the case of themed tours, trips revolve around experience, activities, and learning – with travellers being far from passive observers. On the demand side, two of the drivers behind the trend are a desire for authentic experiences and a greater access to information that allows travellers to search for theme-based travel ideas online. The trend is also driven by marketing of routes through storytelling, something which is promoted by tourism bodies: for example, ETC and UNWTO in 2017 published a handbook on marketing tourism themes and routes intended as a resource for destinations looking to developing cross-border tourism.[9]

Some of the themed routes are suggested travel itineraries, while others are more of a network of collaborating destinations and attractions. Examples include routes in various wine-producing regions, including new cross-border wine routes in the traditional wine regions in the Caucasus and the 'Secret Wine Tours' project, which promotes hiking, cycling, and motorbiking through lesser-known wine-producing areas in Austria, Croatia, Hungary, Italy, the Netherlands, Slovenia, and Spain. Another example of gastronomic travel themes is 'The Chocolate Way', which incorporates destinations across Europe with a connection to the sweet aliment. Other routes use modern history as their theme, such as the 'Liberation Tour' through France, Belgium, the Netherlands, and Germany, which focuses on the latter part of the Second World War. Spirituality is used as a theme for the many pilgrimage walking routes across Europe, including 'St Olav's Trail' through Norway and Sweden as well as the more well-known 'Camino de Santiago' through several countries leading to Spain's Santiago de Compostela.[10]

1.2.5 Cross-border travelling has become easier

Cross-border multi-destination travel is also made easier by parallel shifts in bureaucracy, mindset, technology, and products available on the market. Thanks to the Schengen Agreement, tourists to Europe can travel between 26 European countries passing no or few passport checks (although checkpoints were reintroduced on some internal borders following the wave of asylum seekers in 2015). Inbound tourists from Japan and the U.S. do not need visas for entering the Schengen area, and in China and India visa applications are made easier through the establishment of more application centres and helplines.[11] Previous reports published by the ETC have noted that more flexible visa regimes would significantly stimulate inbound tourism.[12] A shift is simultaneously taking place in travellers' minds in parallel with increasing international exchanges, as more and more modern tourists expect being able to cross borders without difficulty.[13]

Multi-destination travel has also become easier thanks to improved air connectivity between destinations within Europe. Legacy as well as low-cost airlines have expanded their intra-Europe networks, and increased competition means that including multiple destinations in one trip has become more affordable for travellers. The emerging ´peer to peer´ economy (including home-sharing services such as Airbnb) has likewise created new options and made more affordable accommodation available at some destinations. Online travel-planning

tools (including those from American TripIt, Chinese Qiongyou, and Indian TripHobo) has simultaneously made independent design of multi-destination trips more convenient.

1.3 Insights from academic tourism research

1.3.1 A model for classifying multi-destination travel patterns

A useful model that can be applied to understand multi-destination trips of different kinds is a trip typology developed by Chi-Chuan Lue, John Crompton, and Daniel Fesenmaier[14], which has been applied by several tourism researchers[15] since it was presented in 1993. The authors describe five different 'spatial patterns' of pleasure travellers, four of which include visiting multiple destinations. Examples of trip itineraries following these patterns can be seen in Figure 1. The model can be used to understand different types of multi-destination trips, different kinds of travel clusters, and how individual destinations fit into the latter.

Figure 1. Four examples of trip itineraries with different spatial patterns in line with the typology by Lue et al.

1. The 'trip chaining' pattern
This is the classical way of doing a tour around Europe, and involves visiting a number of main highlights one after another – located far away from each other in different parts of the continent. This is both what most individual Interrail/Eurail travellers have been doing, and the way in which typical group tours of Europe have been designed for overseas travellers. In Figure 1, the pattern is exemplified by a tour of six European capitals.

2. The 'regional tour' pattern
Regional tours also imply visiting one destination after another, but with all destinations being located close to each other. The destinations do however not need to be in the same country. The example in Figure 1 is a tour in the border region of France, Germany and Switzerland.

3. The ‘base camp’ pattern
A trip of this style includes visiting multiple destinations either as day trips or over-night, but returning to one main destination in between. In the example in Figure 1, the traveller uses Copenhagen as a base while also visiting destinations around it.

4. The ‘en route’ pattern
The last pattern includes one or more secondary destinations located along the way to or from a primary destination. For long-haul travellers, who in most cases travel by air from their home country to one of their destinations, ‘en route’ destinations may be included between two primary destinations if they use land-based transport to travel within Europe. In Figure 1, an itinerary includes Zagreb and Munich, with the Austrian village of Dorfgastein (located along the railroad between the cities) as an ‘en route’ destination.

1.3.2 Four reasons for visiting multiple destinations

Lue et al also present a list of different reasons that travellers might have for choosing a multi-destination rather than a single-destination trip[16]:

Figure 2. Four reasons for choosing a multi-destination trip.

A fifth reason is ‘visiting friends and relatives’. This is likely less important for long-haul travellers as a reason for visiting multiple destinations.

1.3.3 An aspect of travelling that deserves more attention

The findings of two academic studies of travellers’ movements between destinations are briefly presented in the Annex of this study. The researchers point out that this is an under-researched field, and that a better understanding of multi-destination travel would be beneficial for the tourism industry. The authors behind one of the studies further argues that the multi-destination nature of many trips is not taken into account when official tourism statistics are collected, and that such statistics can therefore be misleading. (See the Annex.)

1.4 Relevance of multi-destination travel for destinations

1.4.1 Increased relevance and visibility

Multi-destination travel is a fundamental part of inbound tourism to Europe. (See section 1.1.) The opportunities that it creates both for individual destinations and for clusters of destinations within a route are of different kinds:

- **Increased relevance to travellers.** Especially smaller towns and countries, which on their own attract few travellers to make a long-haul trip, can increase their appeal as a joint destination.
- **Increased visibility.** Less well-known destinations that struggle to get attention on their own can become visible when marketed collaboratively as part of a region or a route.
- **Better dispersal over a region**, with reduced pressure on the most popular destinations.

The two main areas for collaborations targeting multi-destination travellers are **joint marketing** and **development of multi-destination travel products.**

Smaller towns, regions, or countries, who attract few overseas travellers on their own, can become visible and relevant as parts of a multi-destination travel route. This can be based on geographic proximity, to make a region become a joint destination in the mind of potential travellers. It can also be based on a theme – either a theme that the destinations already have in common, or that can be promoted jointly.

Towns and areas that are located far from potential collaboration partners, but on the way between established tourist destinations, have the opportunity to increase their visibility by **establishing themselves as 'en route' destinations**. This is especially an option on locations where it is convenient for bus, car, or train travellers to make overnight stops. An example of such an initiative can be found in the west-Swedish county of Värmland, where local tourism businesses want to encourage primarily Chinese bus tourists on their way between Oslo and Stockholm to make multi-night stops and enjoy the nature.[17] This is an example of how knowledge of common trip itineraries creates opportunities for smaller destinations, with an additional advantage of potentially **attracting tourists to less crowded areas**.

1.4.2 Leveraging neglected cross-border synergies

Especially for cross-border collaborations, a major opportunity lies in leveraging **synergies that have often been neglected** due to a prevailing nation-oriented mindset and a similarly nation-oriented structure of most tourism bodies. Because of the nation-oriented structures, cross-border projects tend to be perceived as peripheral. Collaborations therefore often take the form of ad-hoc or case-by-case projects – which tend to be fragile. One way of overcoming this is to establish formalised partnership frameworks, such as the European Grouping of Territorial Cooperation (EGTC) that integrates various kinds of projects in cross-border regions.[18] Transnational cooperation on a regional level has increased in recent years, with support of European Union structural funds aiming to promote inter-regional cooperation.

2. Survey of multi-destination travellers

A survey of travellers from the four focus markets with experience of travelling to Europe was conducted as part of the study. One key finding from the survey is that for a vast majority (92%) of the respondents, their most recent trip to Europe included multiple destinations on a town or city level (by combining destinations in different parts of Europe and/or within a country or region). 60% visited more than one country.

Notable observations include that…

- The most common reason for visiting multiple destinations is to get variation during the trip, except in Japan where it is more often a way to save money. Respondents travelling with other companions than their partner/spouse are more likely to make a multi-destination trip to cater for different destination preferences.
- The typical trip combines three city-level destinations.
- 54% of travellers focus on different themes or activities on different destinations.
- Fully independent travellers (who neither join a tour group nor let an agency organise their trip) visit fewer destinations than others.
- Travellers who visit more destinations (cities or countries) 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 destinations.
- Trips combining more destinations (cities or countries) tend to be longer in time, but with less time spent on each destination.
- Experiencing local lifestyle is more important for travellers combining many countries during a trip, while shopping and dining are more important for those visiting fewer countries.

Detailed results of the survey are for the exclusive use of ETC members.

3. Analysis of multi-destination travel in Europe from four targeted markets

To get a detailed image of what itineraries are used by multi-destination travellers, a large amount of data is required. A data mining study has therefore been conducted based on online reviews of travel attractions. The main outcomes of this analysis are:

- A mapping of how often travellers combine each country with each other country
- A conceptual network showing how closely individual city-level destinations are connected to each other
- 13 clusters of trip itineraries on a town/city level

3.1 An analysis of trip pattern based on millions of online reviews

The maps and figures in this chapter are based on a quantitative analysis of online reviews by travellers from China, India, Japan, and the U.S. The data was collected and structured in the following way:

1. Travellers who have reviewed at least one attraction either in one of ETC's member countries or in France, Sweden, or the U.K. during the last twelve months were selected.
2. All reviews written by these travellers of attractions in Europe (including Anatolia, the Azores, the Canary Islands, Greenland, Madeira, and Russia west of the Ural) were collected. This resulted in a collection of ~1 million reviews from each of the four markets. 3 million of the reviews were from attractions in Europe.
3. Reviews posted shortly after one another were identified as belonging to the same trip.
4. Trips taking place solely within a single country were filtered out. 40,434 identified cross-border trips remained after the filtering.

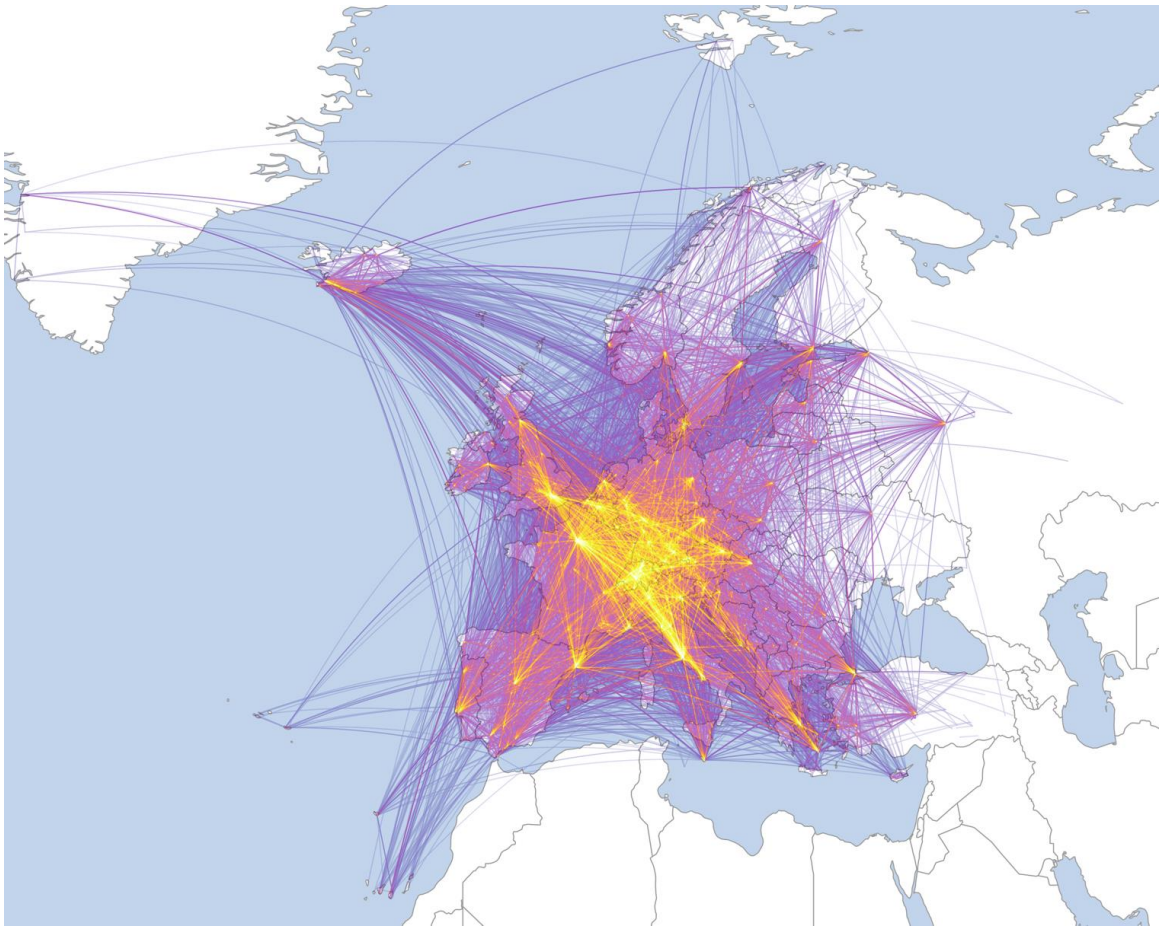
The method, described in more detail in the Annex, makes it possible to do an analysis of the multi-destination travel routes used by actual travellers. It does not give a 100% exact picture of each traveller's trip on an individual level, as some travellers post reviews from some destinations but not from others. (If a traveller combines France, Italy, and San Marino – but does not post any review from Italy – it will look like a trip to only France and San Marino.) On an aggregate level, however, clear patterns emerge, including which destinations are typically combined and general characteristics of the trips combining them.

The usual caveat also applies: online reviews are primarily posted by independent travellers who are active in social channels, and they are therefore not necessarily representative for all travellers. To give a broader picture, the report also includes results reached through other methods, including an analysis of OTA data, analysis of train itinerary data from Eurail Group, a survey, and desk research.

3.1.1 The whole picture

In Figure 12, the legs in all trips – as seen through the review data – have been plotted on a map to provide an overview of the data. The bright colour in large parts of Central and Western Europe shows that a large share of the trips was concentrated there. The dominance of major routes within this area – particularly the dominance of routes connecting France with surrounding countries – is also supported by the survey: 24% of multi-country travellers among the survey respondents combined France and Italy during their most recent trip to Europe according to the survey data, while 16% travelled between France and Germany, and 15% travelled between France and the U.K. There is also a high concentration of trips within and around Switzerland (a pattern that is even stronger in the train itineraries of Eurail travellers – see Chapter 4).

Figure 12. An overview of all trips identified through the review data. Higher opacity of a line indicates that a travel leg has been used by more travellers. Bright-coloured areas indicate a high concentration of legs that meet or cross each other.



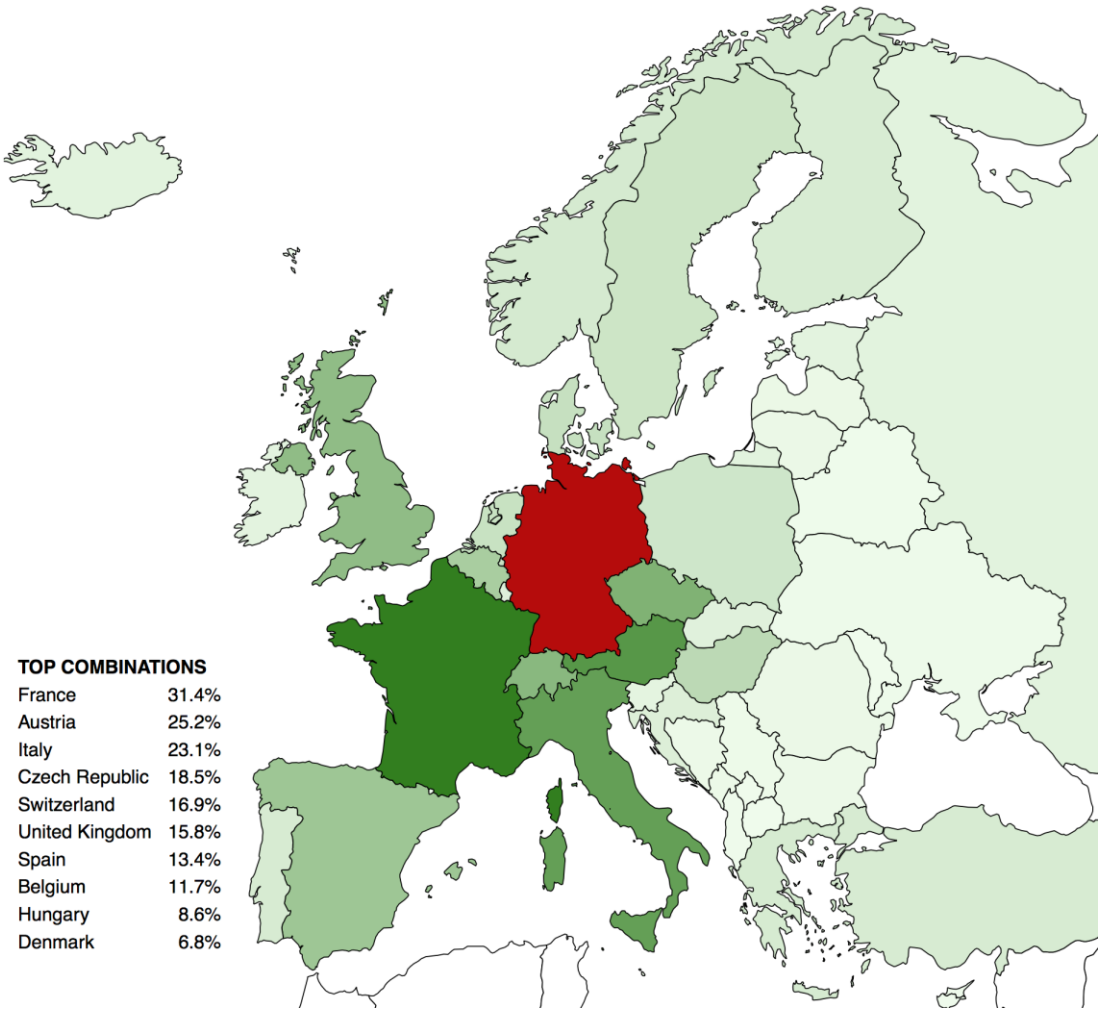
3.2 Country combinations

Different statistical methods have been used to gain deeper insights from the data. First, country-to-country combinations have been measured using cross-tabulation. The result of this analysis is one map for each of ETC's member countries plus France, Sweden, and the U.K., showing how often a country is combined with each of the other countries. Figure 13 focuses on Germany, and shows that 31.4% of the cross-border trips that include Germany also include France, while 25.2% include Austria and 23.1% include Italy. A darker colour on the map indicates that a country is more often combined with the country in focus and vice versa. All maps can be found in the Annex. To give an overview, Table 1 below shows the same numbers on one and the same page. The table should be read row by row. The percentages refer to the shares of trips to the countries in the leftmost column that also include each of the countries in the topmost row. One usage of the maps and the table is for national tourism organisations to identify relevant collaboration partners. The 'number of trips' column shows how many trips the percentages on each row refer to. (Caution should be taken when interpreting the percentages on rows where this number is low.)

Table 1. Country combinations in trips identified through online reviews

	Number of trips	Austria	Belgium	Bulgaria	Croatia	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Iceland	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Monaco	Montenegro	Netherlands	Norway	Poland	Portugal	Romania	San Marino	Serbia	Slovakia	Slovenia	Spain	Sweden	Switzerland	Turkey	United Kingdom
Austria	5,968		7%	1%	5%	0%	36%	4%	1%	2%	23%	44%	4%	25%	2%	2%	24%	1%	1%	2%	1%	0%	1%	4%	3%	5%	4%	1%	0%	1%	8%	4%	11%	4%	17%	4%	12%
Belgium	3,382	13%		1%	3%	0%	11%	6%	2%	3%	47%	36%	5%	6%	3%	3%	23%	1%	1%	9%	1%	1%	1%	14%	5%	4%	6%	1%	0%	1%	2%	1%	17%	6%	14%	4%	23%
Bulgaria	383	10%	7%		13%	2%	8%	5%	5%	5%	14%	17%	15%	14%	3%	3%	18%	5%	4%	3%	3%	1%	7%	3%	5%	10%	5%	35%	1%	17%	5%	8%	13%	5%	6%	15%	18%
Croatia	1,873	16%	5%	3%		0%	11%	4%	2%	3%	17%	18%	12%	13%	2%	2%	32%	2%	1%	1%	3%	1%	17%	2%	4%	6%	5%	3%	1%	5%	4%	29%	13%	4%	7%	6%	14%
Cyprus	169	8%	6%	4%	5%		8%	5%	4%	4%	20%	15%	27%	3%	4%	4%	21%	5%	4%	4%	12%	3%	2%	2%	10%	6%	8%	4%	2%	2%	2%	3%	16%	4%	5%	12%	31%
Czech Republic	4,996	43%	7%	1%	4%	0%		4%	1%	3%	21%	38%	5%	30%	2%	2%	18%	1%	1%	2%	1%	0%	1%	5%	3%	10%	4%	1%	0%	1%	8%	2%	12%	4%	10%	5%	12%
Denmark	2,573	9%	8%	1%	3%	0%	8%		8%	18%	18%	27%	5%	5%	9%	3%	16%	2%	2%	2%	1%	0%	1%	6%	31%	5%	5%	1%	0%	1%	2%	2%	13%	40%	9%	3%	18%
Estonia	1,061	5%	6%	2%	4%	1%	6%	21%		56%	11%	20%	3%	3%	3%	2%	8%	29%	24%	2%	2%	0%	2%	2%	14%	13%	4%	2%	0%	1%	2%	3%	9%	26%	4%	3%	13%
Finland	1,844	7%	6%	1%	3%	0%	8%	25%	32%		17%	22%	5%	4%	7%	2%	12%	10%	9%	2%	2%	0%	1%	4%	24%	7%	5%	1%	0%	1%	2%	2%	12%	33%	7%	5%	13%
France	13,598	10%	12%	0%	2%	0%	8%	3%	1%	2%		24%	5%	4%	2%	3%	34%	1%	0%	2%	1%	2%	1%	5%	3%	2%	4%	1%	0%	0%	1%	1%	22%	3%	20%	4%	24%
Germany	10,328	25%	12%	1%	3%	0%	18%	7%	2%	4%	31%		4%	9%	2%	2%	23%	1%	1%	3%	1%	1%	1%	6%	4%	5%	4%	1%	0%	0%	3%	2%	13%	6%	17%	4%	16%
Greece	2,822	9%	6%	2%	8%	2%	8%	5%	1%	3%	23%	16%		6%	3%	2%	39%	1%	1%	2%	3%	1%	4%	5%	5%	4%	5%	2%	0%	1%	2%	3%	19%	4%	10%	19%	19%
Hungary	3,112	48%	7%	2%	8%	0%	48%	4%	1%	3%	17%	29%	6%		2%	2%	18%	1%	1%	1%	1%	0%	2%	4%	3%	10%	5%	3%	0%	2%	13%	5%	12%	4%	8%	5%	13%
Iceland	1,124	8%	9%	1%	4%	1%	9%	20%	3%	12%	24%	20%	7%	6%		6%	17%	1%	2%	2%	2%	1%	2%	7%	21%	5%	6%	1%	0%	1%	2%	2%	17%	17%	7%	5%	25%
Ireland	1,683	6%	7%	1%	2%	0%	6%	4%	1%	2%	20%	13%	4%	4%	4%		16%	1%	1%	1%	1%	0%	1%	2%	4%	4%	5%	1%	0%	0%	1%	1%	12%	4%	5%	3%	68%
Italy	11,663	12%	7%	1%	5%	0%	8%	3%	1%	2%	40%	20%	9%	5%	2%	2%		1%	1%	1%	3%	1%	1%	4%	3%	3%	5%	1%	1%	1%	1%	3%	22%	3%	17%	5%	18%
Latvia	546	9%	6%	4%	5%	2%	11%	11%	57%	34%	13%	18%	5%	5%	3%	3%	12%		53%	3%	2%	1%	2%	5%	11%	21%	5%	3%	0%	3%	4%	5%	13%	18%	5%	5%	10%
Lithuania	479	9%	8%	4%	6%	1%	9%	13%	53%	33%	12%	18%	6%	5%	5%	3%	13%	61%		4%	3%	0%	3%	5%	11%	27%	7%	3%	0%	3%	2%	5%	12%	15%	5%	6%	10%
Luxembourg	574	19%	50%	2%	5%	1%	16%	9%	3%	7%	51%	52%	8%	7%	4%	4%	26%	3%	3%		3%	1%	2%	22%	8%	6%	10%	2%	1%	1%	4%	3%	18%	8%	23%	6%	19%
Malta	806	9%	6%	1%	7%	2%	6%	4%	2%	3%	21%	16%	11%	5%	2%	3%	48%	2%	2%	2%		2%	3%	3%	4%	5%	7%	1%	1%	1%	2%	4%	21%	5%	7%	8%	26%
Monaco	344	5%	7%	1%	7%	1%	5%	3%	1%	2%	83%	15%	9%	3%	3%	2%	43%	1%	1%	2%	6%		4%	0%	3%	4%	6%	2%	1%	1%	1%	3%	31%	3%	12%	7%	19%
Montenegro	466	12%	6%	6%	69%	1%	8%	4%	3%	5%	18%	15%	23%	11%	4%	3%	37%	3%	3%	3%	5%	3%		3%	4%	6%	5%	5%	1%	16%	4%	26%	14%	3%	7%	7%	12%
Netherlands	1,449	18%	32%	1%	3%	0%	17%	10%	1%	5%	47%	46%	9%	9%	5%	2%	32%	2%	2%	9%	2%	0%	1%		7%	4%	8%	1%	0%	1%	3%	2%	25%	8%	18%	7%	17%
Norway	2,378	8%	7%	1%	3%	1%	7%	34%	6%	18%	17%	19%	6%	4%	10%	3%	15%	3%	2%	2%	1%	0%	1%	4%		5%	4%	1%	0%	1%	2%	2%	13%	38%	8%	4%	20%
Poland	1,722	18%	9%	2%	7%	1%	29%	8%	8%	7%	19%	32%	6%	19%	3%	4%	18%	7%	7%	2%	2%	1%	2%	3%	7%		5%	3%	0%	2%	7%	5%	14%	8%	9%	6%	19%
Portugal	2,394	9%	9%	1%	4%	1%	8%	5%	2%	4%	25%	18%	6%	6%	3%	3%	22%	1%	1%	2%	2%	1%	1%	5%	4%	4%		1%	0%	1%	2%	2%	61%	5%	8%	6%	20%
Romania	455	13%	6%	29%	13%	2%	13%	5%	4%	5%	18%	20%	9%	22%	2%	5%	19%	4%	3%	3%	2%	1%	5%	3%	6%	10%	6%		1%	15%	5%	7%	11%	5%	7%	9%	17%
San Marino	96	7%	5%	4%	10%	3%	5%	5%	1%	4%	25%	13%	9%	4%	2%	1%	94%	0%	1%	3%	6%	3%	3%	0%	2%	5%	7%	4%		4%	2%	5%	18%	5%	10%	3%	6%
Serbia	289	12%	6%	23%	33%	1%	12%	6%	4%	4%	17%	18%	11%	22%	2%	2%	25%	5%	6%	2%	3%	1%	25%	3%	5%	11%	7%	23%	1%		5%	15%	11%	8%	11%	12%	13%
Slovakia	792	61%	8%	3%	10%	1%	50%	5%	3%	4%	18%	34%	6%	52%	2%	2%	18%	3%	1%	3%	3%	1%	2%	5%	5%	15%	6%	3%	0%	2%		8%	11%	4%	11%	5%	11%
Slovenia	925	26%	5%	3%	58%	1%	13%	4%	3%	4%	16%	21%	8%	16%	3%	2%	34%	3%	2%	2%	3%	1%	13%	3%	4%	9%	6%	4%	1%	5%	7%		10%	4%	7%	5%	10%
Spain	8,141	8%	7%	1%	3%	0%	7%	4%	1%	3%	37%	17%	7%	5%	2%	3%	32%	1%	1%	1%	2%	1%	1%	4%	4%	3%	18%	1%	0%	0%	1%	1%		4%	8%	5%	21%
Sweden	2,573	8%	7%	1%	3%	0%	8%	40%	11%	24%	18%	23%	4%	5%	7%	2%	15%	4%	3%	2%	2%	0%	1%	5%	35%	5%	4%	1%	0%	1%	1%	1%	12%		8%	4%	16%
Switzerland	5,407	18%	9%	0%	2%	0%	9%	4%	1%	2%	49%	32%	5%	4%	2%	2%	36%	1%	0%	2%	1%	1%	1%	5%	3%	3%	4%	1%	0%	1%	2%	1%	13%	4%		3%	17%
Turkey	2,286	11%	6%	2%	5%	1%	10%	4%	1%	4%	22%	19%	23%	7%	2%	2%	27%	1%	1%	2%	3%	1%	1%	4%	4%	5%	6%	2%	0%	1%	2%	2%	18%	4%	8%		19%
United Kingdom	9,503	8%	8%	1%	3%	1%	6%	5%	1%	3%	35%	17%	6%	4%	3%	12%	22%	1%	1%	1%	2%	1%	1%	3%	5%	3%	5%	1%	0%	0%	1%	1%	18%	4%	10%	4%	

Figure 13. Countries often combined with Germany during multi-destination trips. (Included in this chapter as an example. One map for each of the ETC's member countries and for France, Sweden, and the U.K. can be found in the Annex.) Percentages refer to the shares of the analysed multi-country trips that include Germany that also include each of the listed countries. The map shows that Germany is most frequently combined with France, Austria, Italy, and Czech Republic.



3.2.1 Varying levels of integration

To gain insights in how countries are connected to each other, rather than just seeing that they are connected, a network analysis has been made of the 250 cities from which most reviews have been posted. In Figure 14, the travel legs between these cities are mapped as a conceptual network. Note that the network is not drawn geographically; the proximity between destinations in Figure 14 instead indicates the degree to which they are connected in the identified travel routes. Well-connected destinations are drawn closer to each other, while those that few reviewers have travelled between appear further away from each other.

One of the main conclusions that can be drawn from the network analysis is that some countries are highly integrated with each other in the travel routes, with cross-border links to cities in neighbouring countries being as strong as the links within the same country. Noteworthy observations include:

- Central Europe is an especially well-integrated region, with many cities in Austria, Czech Republic, Germany, Hungary, and Slovakia having stronger cross-border links than domestic links.
- As a country, Germany is particularly well-connected to its neighbouring countries, with many links from German cities to cities in Austria, Czech Republic, Denmark, France, and Luxembourg.
- Other countries, including the Netherlands and Poland, are more separate, with a major share of trip legs within their borders.

- Three strong clusters of countries, with many cross-border trip legs between them, are largely separate from the main network:
    - The Balkans
    - Greece and Turkey
    - The Nordic and the Baltics
- There is a main Spanish cluster made up of Barcelona together with destinations in Andalusia and around Madrid. However, the Basque Country is more closely connected to destinations in south-east France, and Santiago de Compostela in Galicia is an integral part of an otherwise Portuguese cluster.
- France is spread out over different parts of the network:
    - Most French destinations make up a loose cluster (to the left in Figure 14) with connections to Monaco, Spain, and Switzerland.
    - Destinations in Alsace can be found in a different part of the network, connected to Basel and to destinations in Germany.
    - Paris, together with nearby destinations and with Normandy, can be found at the centre of the whole network, separated from both of the above. This is because Paris has a special role as a main European hub, and is included in a very large share of 'trip chaining' tours across major European cities – more closely connected to London and Rome than to Nice. (Trips to smaller French destinations, on the other hand, have more of a 'regional tour' pattern).

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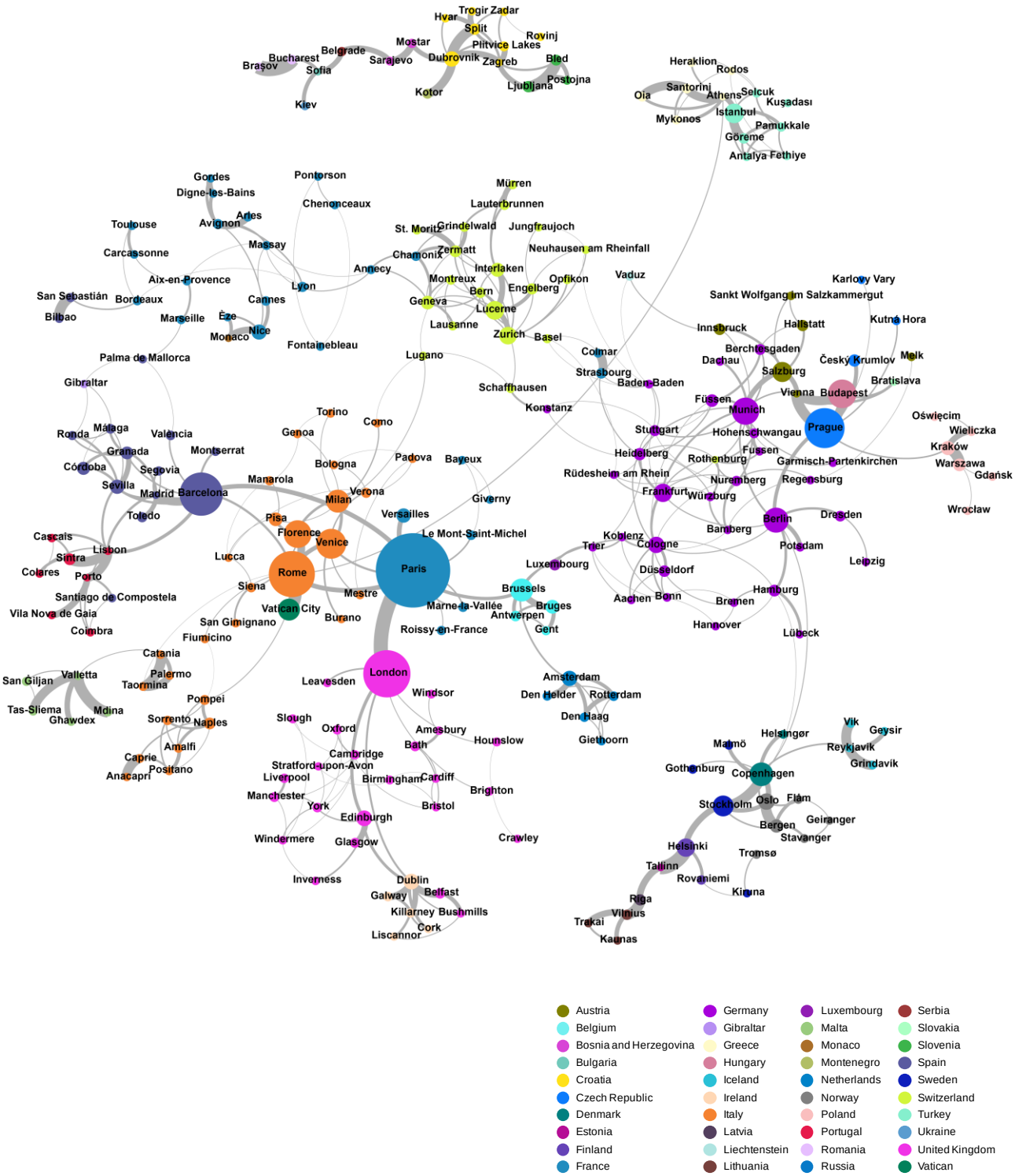
Figure 14. Conceptual network of the 250 European cities and towns that are most visited in the trips identified through online reviews. Note that the network is not geographic; the distance between circles instead indicates how closely cities are connected in the trip network. The grey links indicate how strongly two cities are connected to each other by travellers going directly between them. A strong backbone linking Paris (the main hub), London, Barcelona, and Rome emerge in the network. A number of regional clusters also emerge, in several cases formed around regional nodes (such as Copenhagen in the Nordic and Baltic cluster). Some cities, such as Brussels, have the role of gateway cities linking different clusters. On a national level, some countries are very well-integrated with their neighbouring countries while others are more separate. Three regions (Balkans, Greece+Turkey, Nordic+Baltic) are internally well-integrated but largely separate from the main network.



3.3 Paris – the main hub

A statistical method known as factor analysis has been applied to identify finer-level patterns in how destinations are combined by travellers. While the network analysis (see Figure 14) is the most effective for getting an overview of travel patterns at an aggregate level, the factor analysis can give more nuances by taking into account that a single destination may be part of several travel routes with different characteristics.

One main finding from the factor analysis is that Paris stands out as a 'hub' or 'node', and is frequently combined with all other major destinations. (Figure 15.) While several other cities are nodes for regional trips, Paris stands out as the city that is most often combined with destinations across the continent. This might at least to some extent be explained by good long-haul flight connections that make it easy to use Paris as an entry point, combined with a prevailing idea of Paris as a number one must-see destination in the eyes of many overseas travellers. Paris' central position and role as a hub can also be seen in the network in Figure 14.

Figure 15. Trips with Paris as a 'node' or 'hub'. Paris is Europe's most central travel hub and is strongly linked to other major destinations including Barcelona, London, Prague, and, Rome. Paris is however also combined with cities across all of Europe in the identified trip itineraries.

Other cities that emerge as hubs, by holding central positions in their respective parts of the travel network, include Barcelona, Copenhagen, London, Munich, Prague, and Rome. Table 2 below shows for each hub the percentage of the identified multi-country trips that start in the hub, the percentage of all trips that it is included in, and the number of other cities that it is directly connected to (defined as cities that at least 100 reviewers have travelled directly to or from).

Table 2. Hubs in the travel network identified through online reviews. 'Connected cities' are cities that the city in focus is directly connected to in at least 100 trips. While Paris is both the most visited city and the main hub on a European level, cities with fewer visitors can serve as regional nodes.

	Travellers starting in city	Travellers visiting city	Connected cities
Barcelona	4.1%	12.7%	18
Copenhagen	1.8%	5.7%	10
London	4.7%	14.1%	25
Munich	1.8%	7.0%	12
Paris	8.6%	23.8%	33
Prague	3.7%	11.5%	16
Rome	3.7%	13.7%	18

3.4 Trip clusters

Apart from identifying Paris as a travel hub, the factor analysis has revealed thirteen clusters of destinations that are typically part of the same itineraries. Since the clusters are aggregations of many individual itineraries, they do not show one exact travel itinerary that is used by all travellers. They do, however, reveal what might be called 'backbones' – the routes most frequently travelled within each cluster – together with a larger number of variations.

The thirteen travel clusters are presented on five regional maps in sections 3.4.3-3.4.7. The maps are not intended to give a high-level overview of all trip patterns (see sections 3.1.1 and 3.2.1 for that), but to highlight especially strong clusters that have emerged through the statistical analysis. As part of the survey, respondents have rated how attractive they find travel routes combining the cities and countries of each cluster. Observations of demographic variables that correlate with a preference for each cluster have been added to the cluster descriptions.

Noteworthy observations include that Northern Ireland is included in a cluster covering the whole island of Ireland, but not in the cluster spanning Great Britain and Paris (see section 3.4.4); that Galicia is more closely connected to destinations along the Portuguese coast than to other destinations in Spain (see section 3.4.6); and that a cluster that combines arctic destinations with Helsinki and Stockholm is largely separate from another cluster which includes all Scandinavian capitals and Bergen (see section 3.4.7).

Several regions have clusters with different seasonal profiles. (This is the case for the two clusters on the British Isles and for the two clusters in Scandinavia.) Destinations in these areas can use the knowledge of which routes are strong in different seasons to select different collaboration partners for different seasons.

Some regions and countries do not show as distinct travel routes as others, and do therefore not appear among the clusters that result from the factor analysis. This is for example the case for Switzerland, which is included in a large number of multi-country routes but shows a higher dispersal in the travel routes both within its borders and crossing the borders into the neighbouring countries. Other countries with less distinct routes include Belgium and the Netherlands. How these (and other) countries fit into the network of European destinations can be seen in Figure 14.

3.4.1 The emerging clusters are not necessarily theme-based

There is a high level of variation in the topics that reviewers talk about within each cluster, indicating that the identified trip clusters are not essentially thematic routes. One possible reason behind the mixture of themes within each of the clusters is that multi-destination travel is partly driven by an appetite for variation. This is seen through the survey (Chapter 2) and has been explained in academic studies – see Lue et al's explanation model in Chapter 1.

Thematic tendencies can nonetheless be seen, with different topics being bigger in some clusters than in others. The fact that the clusters are not thematic does not mean that purely thematic travel routes do not exist, but rather that thematically based travel remains too small or too fragmented to stand out as clusters. As the survey shows (see Chapter 2), around half of the surveyed travellers do focus on a specific theme during their trips – showing that there is a strong segment that can be targeted with themed marketing and products.

3.4.2 Introduction to the visualisations

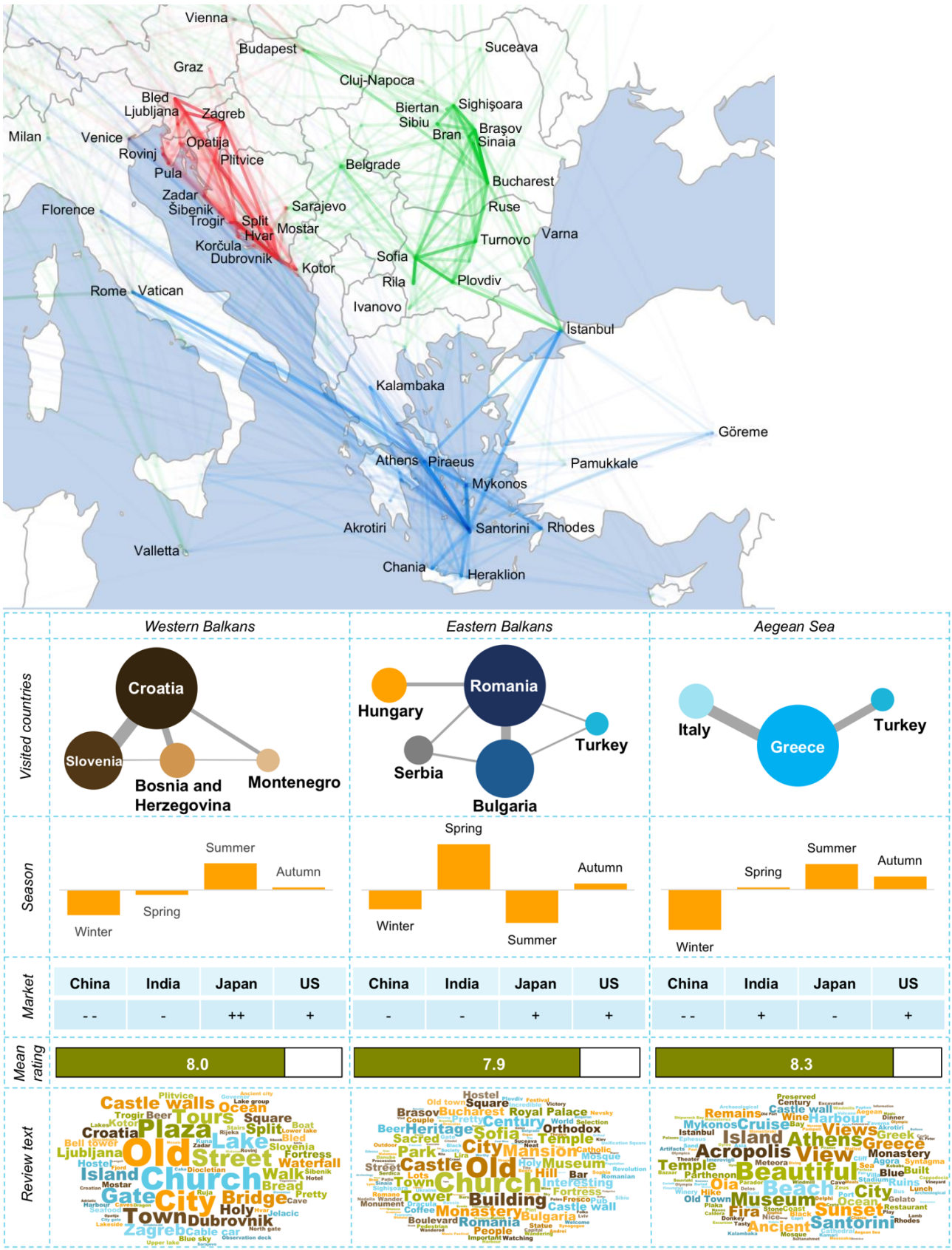
A set of visualisations is presented for each trip cluster in sections 3.4.3-3.4.7:

- The links between destinations (representing trip legs) are drawn on a map, with the strength of each line representing the degree of concentration of trips.
- The relative sizes of countries included in the trip cluster, based on how large shares of the trips within the clusters include each country, are shown below the map. (A larger circle indicates that a larger share of trips includes the country it represents.) The width of the lines connecting the country circles represent how often travellers travel directly between one country and another.
- The degree to which different seasons are over- or underrepresented for trips to a cluster (compared to each season's share of all analysed trips) are shown. Seasons have been identified based on the date of the first review of a trip:
    - Winter: December-February
    - Spring: March-May
    - Summer: June-August
    - Autumn: September-November
- The clusters are not equally represented on all markets. The degree to which a cluster is weaker or stronger on a specific market compared to on all markets taken together is indicated by a scale from '---' (a much lower share of the trips made by travellers from a certain market are located within the cluster) to '+++'(a much higher share of the trips made by travellers from a certain market are located within the cluster).
- Satisfaction levels are indicated through the mean rating of all reviews of all trips within the trip cluster. Ratings are shown normalised to a scale from 1 (worst possible) to 10 (best possible).
- Words that are overrepresented in review texts from trips within the trip cluster are shown in a 'word cloud'.
- 'Mean rating' refers to the ratings of attractions within the clusters given in the analysed reviews, normalised to a scale from 1.0 (worst possible) to 10.0 (best possible).

Apart from the visualisations, each trip cluster is described in a text paragraph summarising the findings from the analysis of review data. Observations from one of the questions in the survey (see Chapter 2), in which respondents were asked to rate how attractive they find tours combining countries and cities included in each trip cluster, are also presented here.

3.4.3 The Balkans

Figure 16. Three itinerary clusters on the western Balkans (red), on the eastern Balkans (green), and centred around the Aegean Sea (blue).



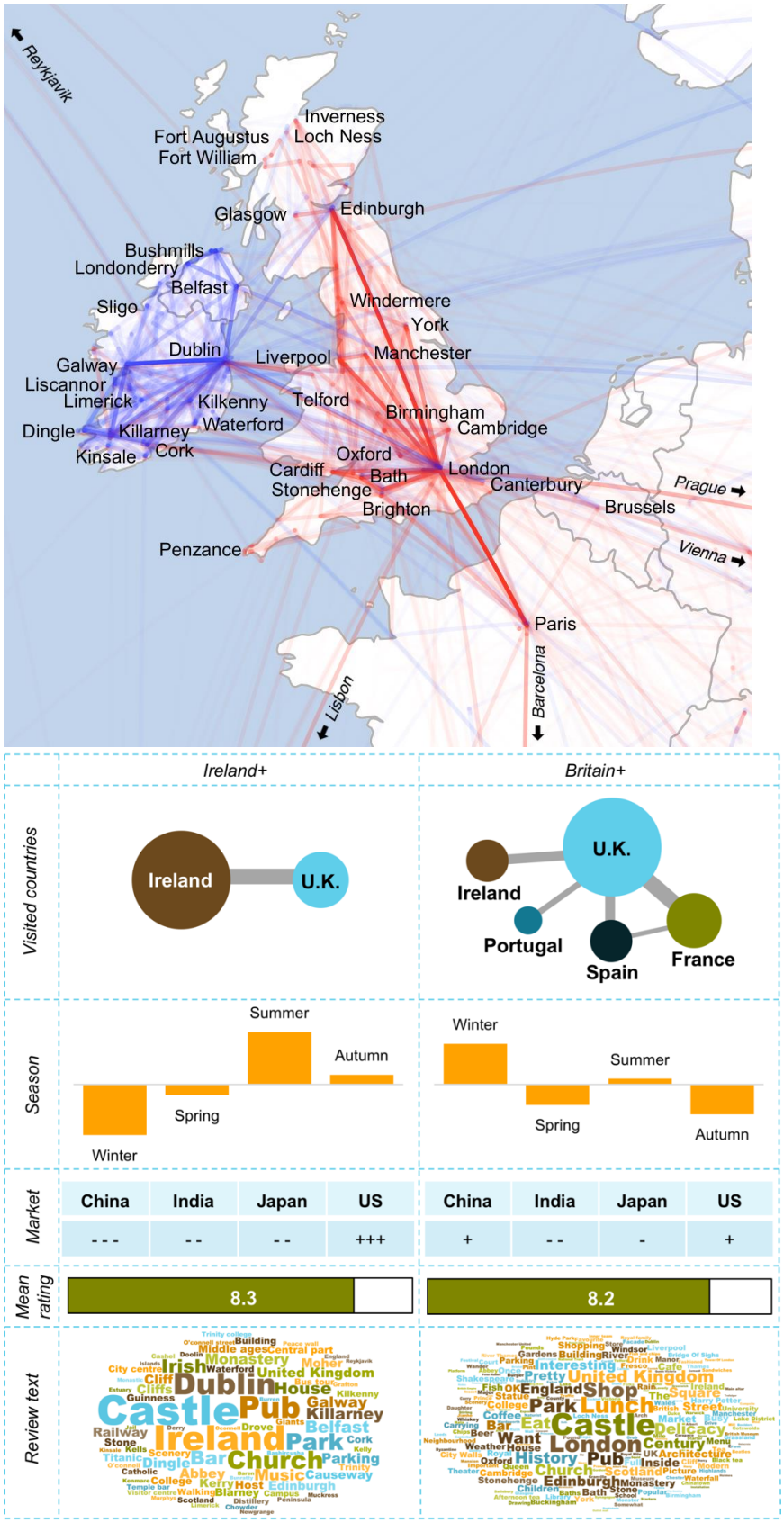
One of the most distinct among the clusters of travel itineraries that have emerged from the factor analysis can be found on the north-eastern side of the Adriatic Sea. Its core stretches southern Croatia's cost, but it also incorporates destinations in the neighbouring countries Slovenia, Bosnia and Herzegovina, and Montenegro. The trip cluster is drawn in red on the map in Figure 16 on the previous page. Looking at the reviews from the trips that the cluster is made up of, it can be seen that a large part of the travellers' attention is on the architectural heritage in the area, including old churches, fortresses, and bridges. Many of the travellers enjoy island life by the ocean or visit natural attractions such as waterfalls and caves. The reviews are most commonly made during the summer months June-August, which is typical for coastal destinations by the Mediterranean, and are more commonly made by travellers from Japan and the U.S. than by travellers from China and India. The survey shows that trips combining Croatia with Slovenia, Bosnia and Herzegovina and Montenegro are more attractive in the eyes of women than of men, and most attractive among the youngest respondents born after 1995.

Another cluster of travel itineraries on the Balkans (green on the map in Figure 16) combining mainly inland destinations in Romania and Bulgaria stretching from Transylvania to Sofia, with side itineraries incorporating Budapest, Belgrade, or Istanbul. The reviews are mainly from springtime (March-May), and the review texts (like in the cluster on the western Balkans) to a large extent focus on the cultural heritage and historic buildings. Orthodox as well as Catholic churches are commonly visited, as are old Transylvanian mansions. Survey respondents who joined a group tour on their most recent trip to Europe are more attracted than others to this area, and younger respondents (born after 1995) rate it higher than those who are older (born before 1970).

The routes drawn in blue on the map in Figure 16 are heavily centred on Athens and a few Greek islands in the Aegean Sea – especially Santorini with its spectacular views and sunsets, which commonly feature in reviews from this cluster. Other typically mentioned attractions are beaches and antique monuments. Greece is at the centre of the cluster, but many of the travellers visit Italy or Turkey during the same trip. Summer is the most important season, and reviews are most common from India and the U.S. Trips combining Greece, Italy, and Turkey are seen as most attractive by survey respondents born before 1970.

3.4.4 The British Isles

Figure 17. One trip cluster centred on Ireland (purple) and one centred on Great Britain (red).



Two largely separate (but to some degree interlinked) travel clusters can be found on the British Isles. One of these covers all parts of the island of Ireland, including the Republic of Ireland as well as Northern Ireland (purple on the map in Figure 17). The other (red on the map) spans most parts of Great Britain, with Paris as an additional core component. The fact that they have emerged as different trip clusters in the statistical analysis indicates that the typical traveller here plans a route on either side of the Irish Sea (perhaps making a detour to the other island, or using London as an entry point on the way to Ireland).

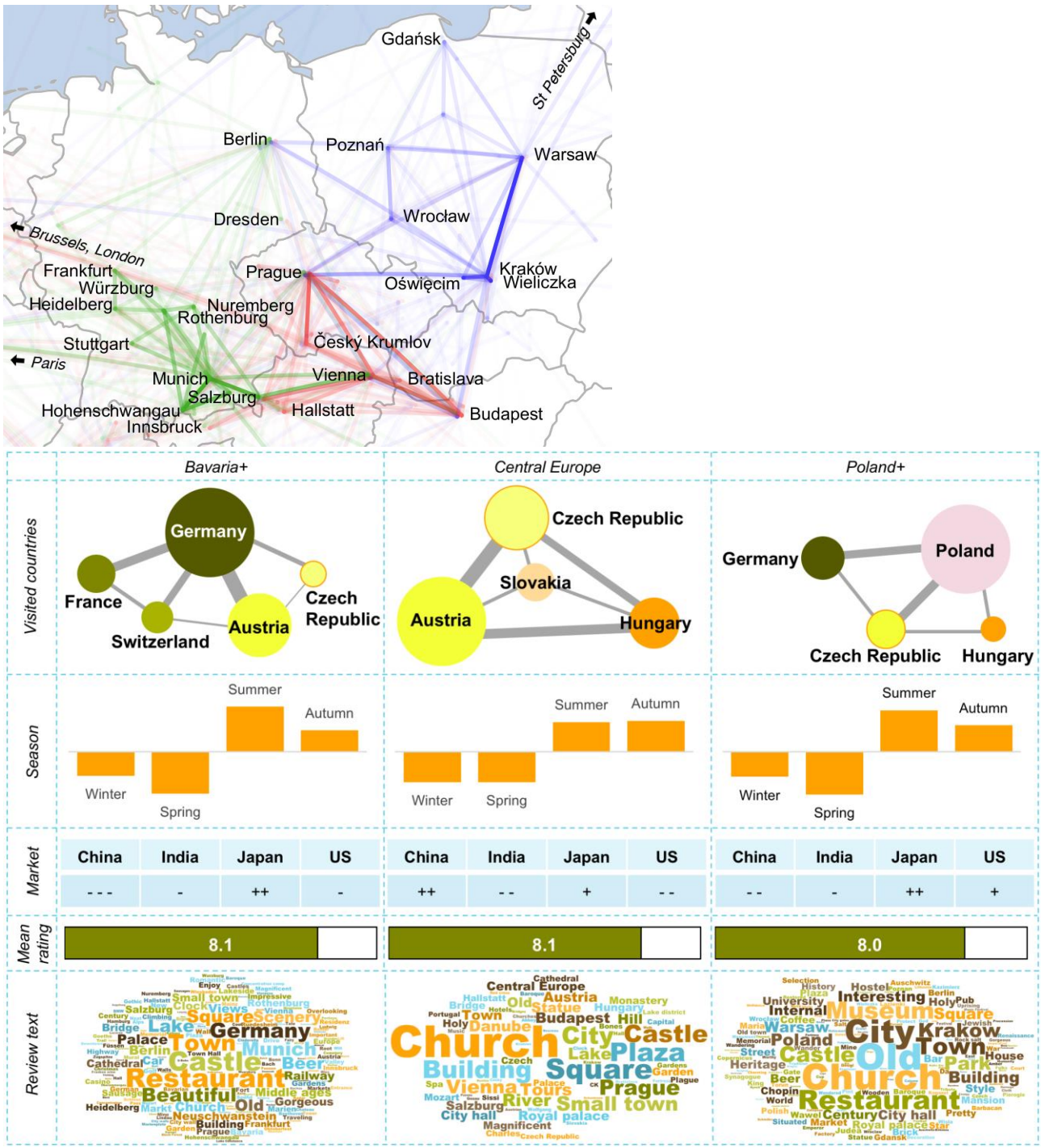
Despite the routes being largely separate, travellers describe similar topics in the review texts from both. Historic castles are important, as are parks. Pub culture and pub food is another heavy theme in both clusters. A wider variety of themes can be seen among the travellers to Britain, where many visit university towns, sites related to Shakespeare or Harry Potter, and mention food from around the former British empire.

The strong link to Paris is represented by the dark red line between Paris and London on the map. It shows that Paris is typically included in trips that otherwise cover Great Britain. For some, Paris is a stop on the route to or from Barcelona. As noted in section 3.3, Paris is also a common entry point to Europe – likely especially for trips to areas, such as Great Britain, that are located within close proximity.

Interestingly, the two clusters have different seasonal profiles: while the trips around Ireland are more commonly made during summer (June-August), winter (December-February) trips are overrepresented within the British cluster. One reason for this could be that trips to big cities such as London, Paris, and Edinburgh make up a large share of the latter trips, while a larger share of the trips around Ireland include natural attractions on the country side (for which good weather is more important). ‘Rain’ is a more common word in reviews from the travellers to Britain, which might be a reflection of the seasonal difference. The survey indicates a difference in which age groups are attracted to trips focusing on the two areas, with older respondents rating Ireland-centred trips higher and younger rating Britain-centred trips higher.

3.4.5 Central and Eastern Europe

Figure 18. One trip cluster centred on Bavaria (green), one on Central Europe (red), and one on Poland (purple).



The trip clusters that have emerged from the analysis in Central and Eastern Europe are less distinct than those in other parts of the continent, indicating that destinations are combined in less standardised ways here. Three partly overlapping trip clusters can nonetheless be identified, as is shown on the map in Figure 18. All of them are typically visited during summer or autumn.

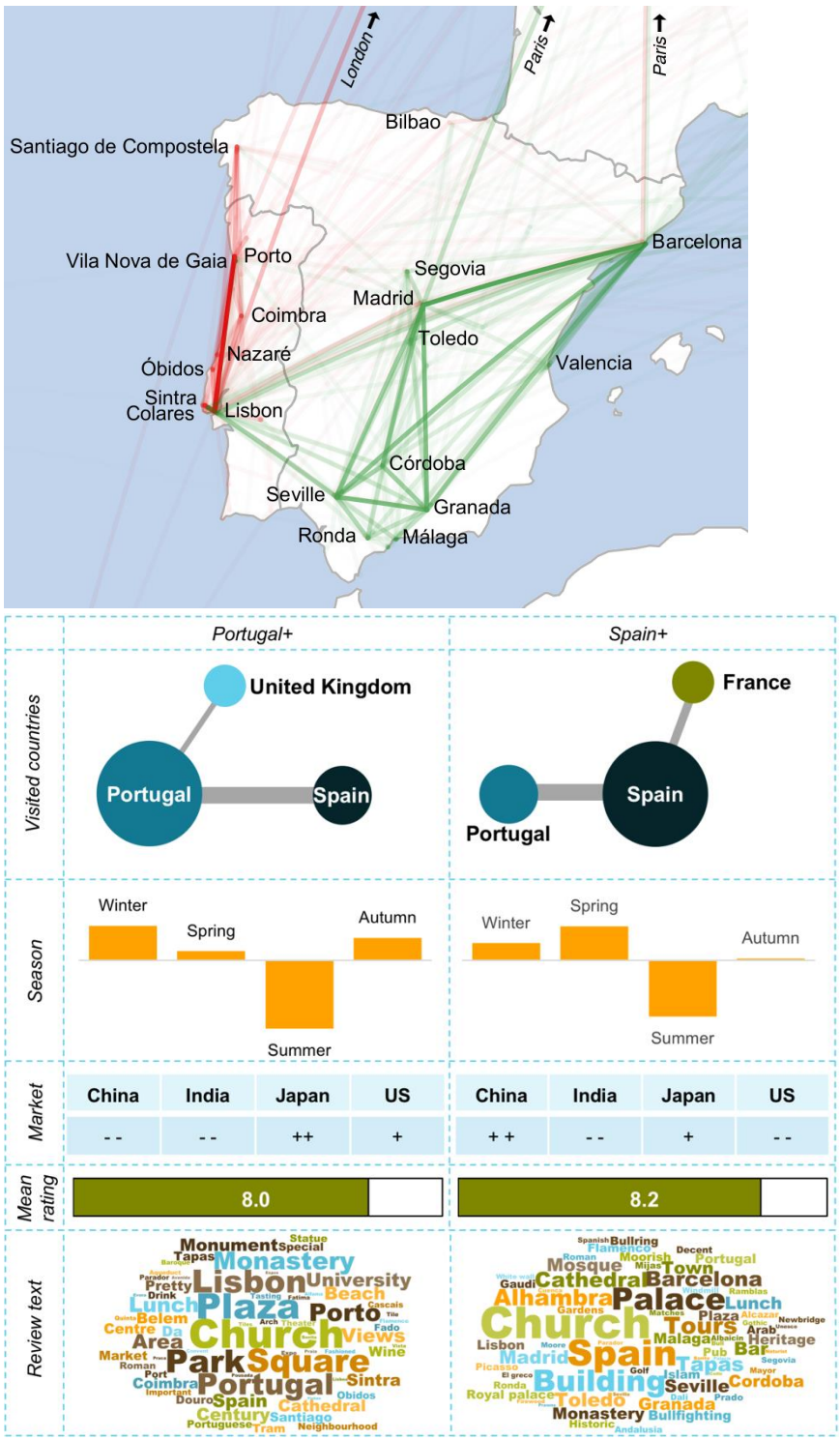
The green cluster is centred on Munich, combining the city with other sights in Bavaria and other parts of south-west Germany and Austria (and sometimes with Paris, Berlin, and Prague). Major themes include food and drinks – notably beer – and castles – notably Neuschwanstein, where references are made to fairy tales and Cinderella. Baroque and Gothic architecture are mentioned, and many describe the area as romantic. Japanese are the most common among the reviewers, and the survey shows a higher interest among travellers born in the 1980s.

Another cluster (red) combines major destinations of Austria, Czech Republic, Hungary, and Slovakia. It is most common among travellers from China and Japan, and common topics include both churches and squares in the capitals as well as spas and scenic small towns such as Český Krumlov in Czech Republic. Sights related to Wolfgang Amadeus Mozart are commonly mentioned, as are sights related to Empress Elisabeth of Austria – referred to as 'Princess Sissi' and famous in East Asia through popular films. The survey does not reveal any clear demographic patterns in who are interested in the area, but respondents who used a travel agent to plan their most recent trip to Europe rate it as more attractive than others do.

The cluster drawn in purple on the map covers large parts of Poland, especially Warsaw and destinations around Kraków, combined with Berlin, Prague and Budapest. Major themes include historic museums and architectural sights of historic towns, and many reviewers mention the Jewish heritage. Others relate to the historic persons Chopin and Copernicus. The dark parts of Europe's history is also a theme, with many travellers visiting concentration camps and other sights related to the holocaust during the second world war. Japanese and U.S. travellers are overrepresented in the review data, and the survey shows that trips combining Poland with Berlin and Prague are rated as most attractive by travellers born before 1980.

3.4.6 The Iberian Peninsula

Figure 19. One trip cluster along the Portuguese and Galician coast (red) and one combining Andalucía with Lisbon, Madrid and Barcelona.

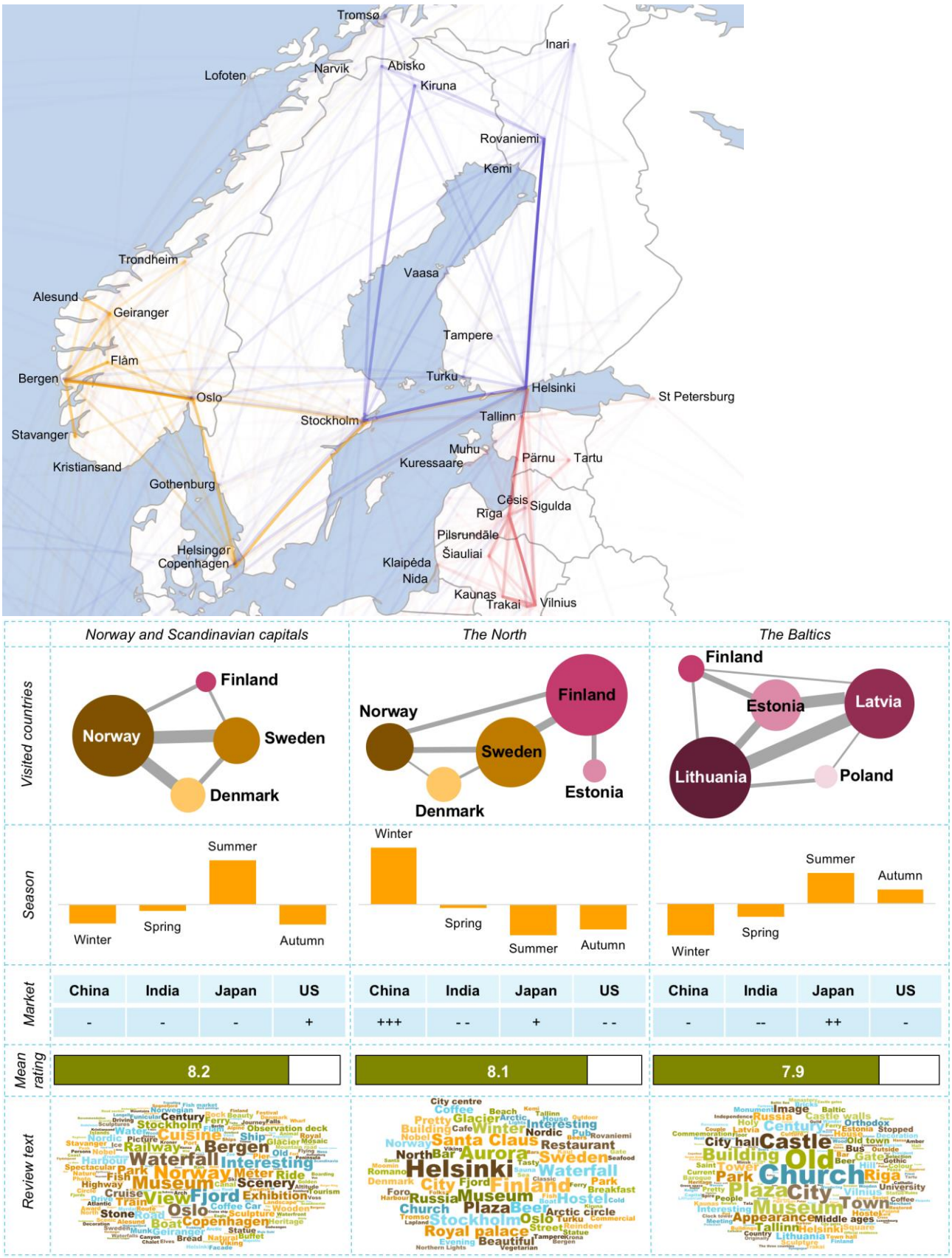


The Portugal+ route cluster (red on the map in Figure 19) spans the west coast of the Iberian Peninsula, from Santiago de Compostela in Galicia, Spain, in the north to Lisbon, Portugal, in the south. This coastal area is, interestingly, frequently combined with a visit to London, U.K. Reviews focus mainly on city sites such as squares and churches, including famous monasteries, the university of Coimbra and tram rides ascending the hills of Lisbon. Some travellers include sunbathing or tasting Port and other wines along their trip, and several mention the painted tiles that are characteristic of Iberian architectural design. Trips here are made at all times of the year outside of the hot summer season, and reviewers from Japan and the U.S. are more common than reviewers from the two other studied markets. Among the survey respondents, trips combining Portugal with Santiago de Compostela are rated as most attractive by those born in the 1970s, and by those with mid-level incomes.

The Spain+ cluster (green on the map) combines major tourist destinations in Andalucía and around Madrid with Barcelona, Valencia, and Lisbon. It is (like several other clusters) frequently also combined with Paris. Major sights featuring in the reviews include the Alhambra fortress in Granada and the historic mosque in Córdoba. Many travellers mention the Islamic heritage in the southern parts of the peninsula, and traditional cultural expressions including flamenco and bullfighting. Others mention the famous artists Dalí, Gaudí, and Picasso. Like in the above cluster along the western coast, the trips are usually made outside of the summer season. Travellers from China and Japan are over-represented. The survey shows an even interest among different demographic segments.

3.4.7 The Nordic and The Baltics

Figure 20. Three trip clusters in northern Europe: 'Norway and the Scandinavian capitals' (yellow), 'The north' (purple), and 'The Baltics' (red).



Two different trip clusters emerge in the Nordic countries. One of these (drawn in yellow on the map in Figure 20) is centred on Norway, with the strongest link being that between the country's two largest cities Oslo and Bergen. These are combined with other destinations along the west coast and around the fiords, and/or with the capitals of the other Scandinavian countries. Natural attractions, such as fiords and waterfalls, are heavily featured in the review texts, together with scenic train, boat, and funicular rides in the Norwegian landscape of mountains and water. The Nordic cuisine is another important theme, and specific attractions such as Tivoli in Copenhagen and the Vasa museum in Stockholm can also be seen. Trips here are concentrated to the summer months, and the U.S. is over-represented among the markets. The survey shows a higher interest in trips combining Norwegian destinations with popular cities within Sweden and Denmark among travellers born before 1970.

Another Nordic trip cluster (purple on the map) is virtually only travelled to during the dark winter months, and mainly by travellers from China and Japan. A main reason to go, which can be seen in the review texts, is the chance to experience northern lights in Arctic region of northern Finland, Sweden, and Norway. Destinations include Rovaniemi in Finland – where Santa Claus is another attraction – and Abisko and Kiruna in Sweden. The arctic region is typically combined with visits to Helsinki and/or Stockholm, and by some also with Copenhagen or Tallinn. The survey does not show any clear demographic tendencies in the interest in travelling to the region.

The final trip cluster (red on the map) combines the three Baltic countries and Helsinki, Finland, with some travellers making side trips to Poland or to St. Petersburg, Russia. Like the cluster in southern Scandinavia, trips here are mostly made during summertime. Here they are however more focused on architectural attractions and on the historic centres of cities such as Riga and Tallinn. Different parts of the region's history are mentioned, including the Hanseatic time and the Soviet occupation in the 20th century. The Baltic countries are often viewed as a whole, and 'the three countries' is a common term in the review texts. Helsinki is likely integrated in the cluster because of how easily the town can be reached by ferry from Tallinn. The review data shows that trips here are most common among travellers from Japan, and the survey shows a higher interest in the area by travellers born in the 1980s.

3.5 Observations per market

Some differences between the markets can be observed by studying Figures 16-20. The symbols in the 'markets' field show the degrees to which each cluster is stronger or weaker among identified trips made by travellers from each of the studied markets compared to among all trips. ('---' means that a cluster is much weaker, '+++' that it is much stronger.) For example, 'The North' cluster is especially strong among Chinese travellers (see Figure 20), while the 'Ireland+' cluster is especially strong among travellers from the U.S (see Figure 17). There is, interestingly, only one cluster that stands out as especially strong among Indian travellers: the 'Aegean' cluster (see Figure 16). All other clusters are, to varying degrees, less strong among Indian travellers than among all travellers – which could mean that the trips made by travellers from India follow slightly different patterns than trips by travellers from the other studied markets. No major differences can however be observed between the travel networks on different markets on an aggregate level, although there are some variations:

- In the Nordic Countries, the itinerary networks of **Chinese** and **Japanese** travellers include more **Arctic** destinations.
- **Paris** is more closely connected to **Italy** in the **Chinese** itinerary network.
- There is a stronger **Irish cluster** (including destinations in the Republic of Ireland and Northern Ireland) in the itinerary network of travellers from the **U.S.**, connected to the main network through London and Edinburgh.
- There is a stronger cluster of **Greek and Turkish** destinations in the **Indian** market.
- There are stronger and more separate clusters of **Swiss** destinations in the **Chinese** and **Japanese** markets, while Swiss destinations are more well-integrated with France and Germany in the Indian and

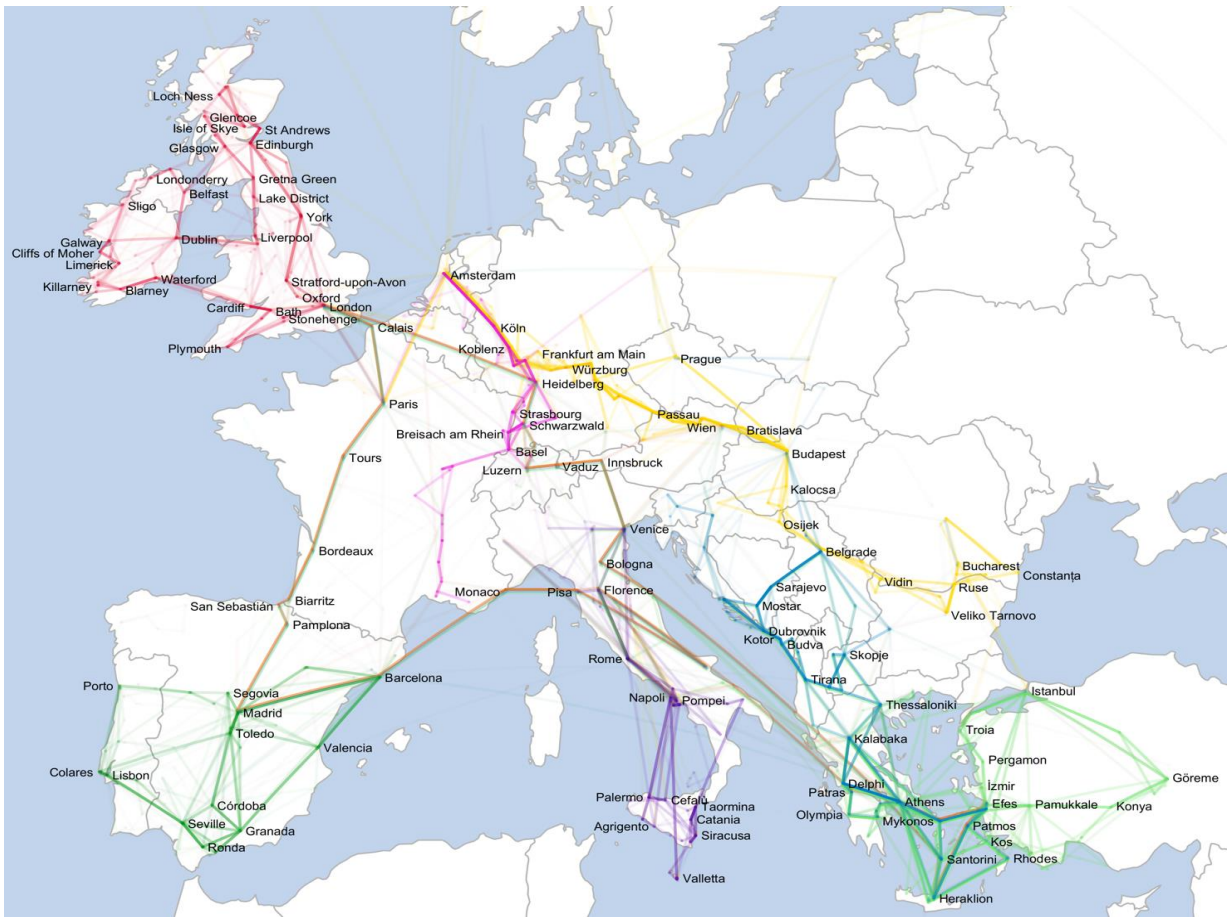
U.S. markets.

- While still largely separate, the cluster of **West Balkan** destinations is more often **combined with Greece** (using Belgrade as a gateway) in the **Indian** market.
- Destinations in **Germany** are more closely integrated with those in **Central Europe** in the **Chinese** market.

3.6 Tour packages on the market

Eight clusters of tour itineraries emerge from a factor analysis of multi-destination products that are advertised by OTAs in China, India, Japan, and the U.S. As the below map shows, the clusters emerging from tour packages are much more focused on a few 'beaten tracks' compared to the clusters identified through trip reviews. Each cluster is made up of tour packages that to a large extent combine the same trip legs. Most individual tours do, however, not include all of the destinations in one of the clusters. The reason why most clusters include a large number of destinations is that different but overlapping tours have been connected to each other. For example, tours including the itinerary Barcelona-Monaco-Florence might have been combined with tours covering Monaco-Florence-Santorini to create a chain from Barcelona to Santorini, etcetera.

Figure 21. Eight clusters of package tour itineraries



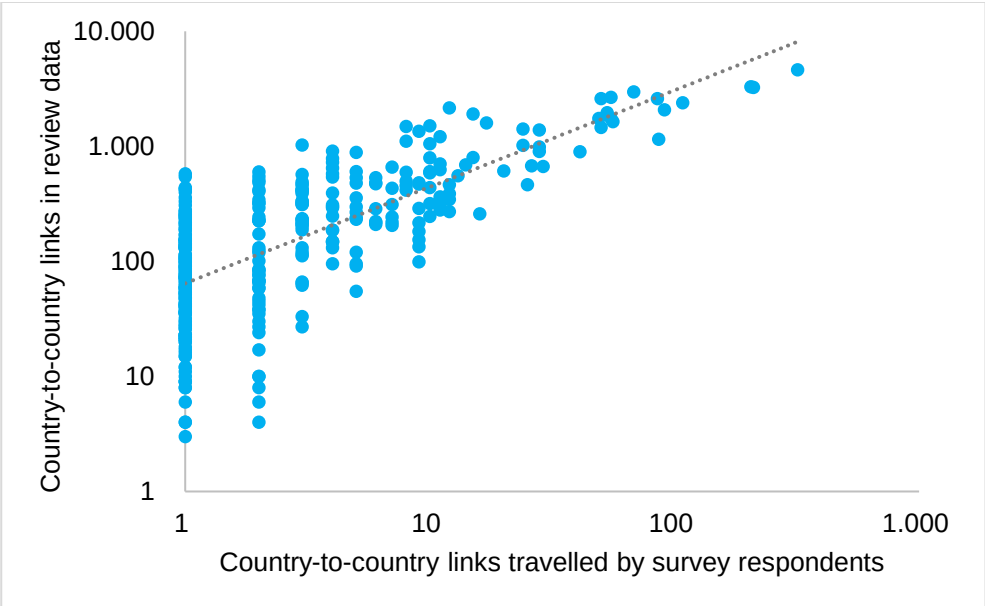
As seen in the map, there are both regional tour clusters and clusters with more of a 'trip-chaining' pattern (see Chapter 1). One of the clusters (brown on the above map) has the character of a 'grand tour', incorporating major destinations across all of Western and Southern Europe. The (pink) cluster combining the Netherlands, Germany, and France consists partly of river cruises on the Rhine, and the (yellow) coast-to-coast cluster is in a similar way largely made up of cruises on the Danube.

Compared to the trip clusters emerging from the analysis of review data, those emerging from an analysis of tour packages come forth as more clear and 'standardised'. This reflects that OTAs and tour operators to a high extent market tours along the main 'beaten tracks'. A possible explanation of why no clusters in the Nordic and Baltic countries have emerged through the factor analysis could be that destinations in this region are combined in less standardised ways in the analysed tour packages.

3.7 Search statistics and the survey support the findings

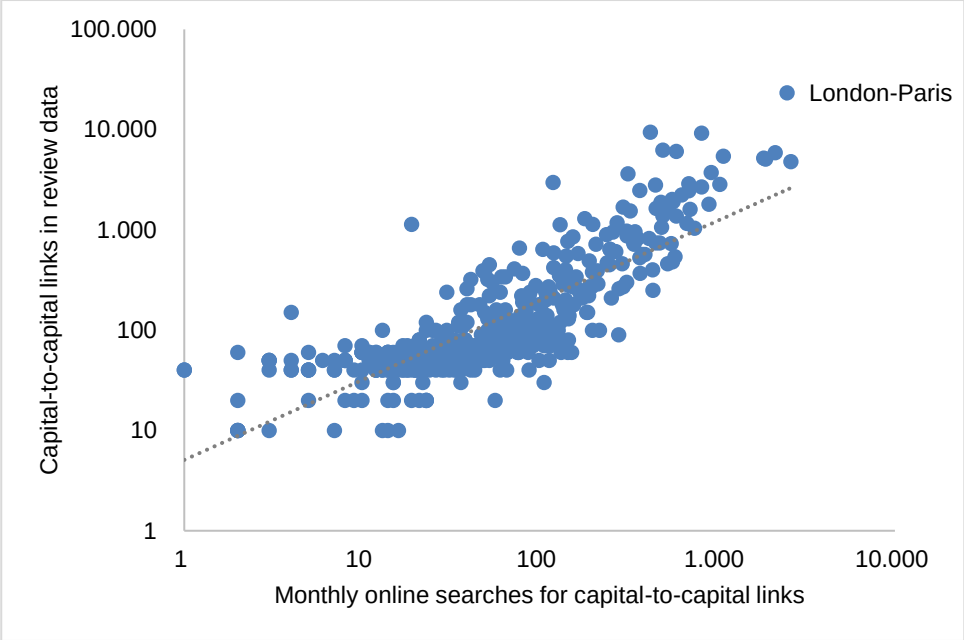
For validation purposes, the destination connections in the review data have been compared to connections between destinations that can be seen through two other data sources: the survey introduced in Chapter 2, and online search statistics. In one of the survey questions, respondents were asked to list the countries that they visited during their most recent trip to Europe. In Figure 22, pairs of countries that have been combined in the same trip by at least one survey respondent and in at least one of the trips identified through the review data mining have been plotted. As can be seen through the figure, the survey shows a similar pattern in which countries are commonly combined; the more often two countries are combined by reviewers, the more often they are also combined by survey respondents. This correlation is strongest among the pairs of destinations that have been combined by a large number of respondents.

Figure 22. Comparison of how often pairs of countries are combined in the same trip according to the survey and according to the review data. Each dot represents the number of times a combination of two specific countries has been made in the same trip according to the review data and according to the survey.



The online search interest has been measured for pairwise combinations of the capitals of ETC's member countries plus London, Paris, and Stockholm. The number of monthly searches on each market's leading online search engine for phrases such as 'Amsterdam to Ankara' and 'Ankara to Amsterdam' have been plotted in Figure 22 together with the number of trips in which the same capitals have been combined according to the review data. Pairs of capitals that see a high search interest tend to more often be combined in the trips identified through the review data mining, as can be seen in the upward trend line.

Figure 23. Comparison of how often pairs of capitals are combined in the same trip according to the review data with how frequently internet users search for the same combinations through search phrases such as 'Berlin to Brussels'.



Three network analyses of the three data sources (Figures 24-26) also reveal that the different sources show similar patterns. There are slight variations between them – for example, Budapest is closer to the Balkan capitals in the network based on search interest than what Hungary is to the Balkan countries in the other two networks – but the main patterns are the same:

- The countries/capitals in Western Europe are closely tied to each other.
- The countries/capitals in Central Europe and Poland are relatively closely connected to Western Europe.
- The Nordic and Baltic countries and capitals are well-integrated with each other, but largely separated from Western and Central Europe.
- The countries/capitals on the Balkans (excluding Greece) are also well-integrated with each other, but largely separated from Western and Central Europe.

When comparing the above with the Eurail train travel patterns – which will be presented in Chapter 4 – we can however see that the latter deviate in several ways. One is that the Eurail routes are concentrated within a smaller part of the continent – likely because the train as a mode of transportation is a limiting factor (many travellers might avoid including destinations far from the main routes due to the time it takes to get there by train). The train trips also include many smaller destinations along the railroads – again, because the railways push people into specific corridors – something which makes the Eurail travel patterns an exception that deviates from the mainstream travel patterns identified through the other sources.

Figure 24. Search interest (capital combinations)

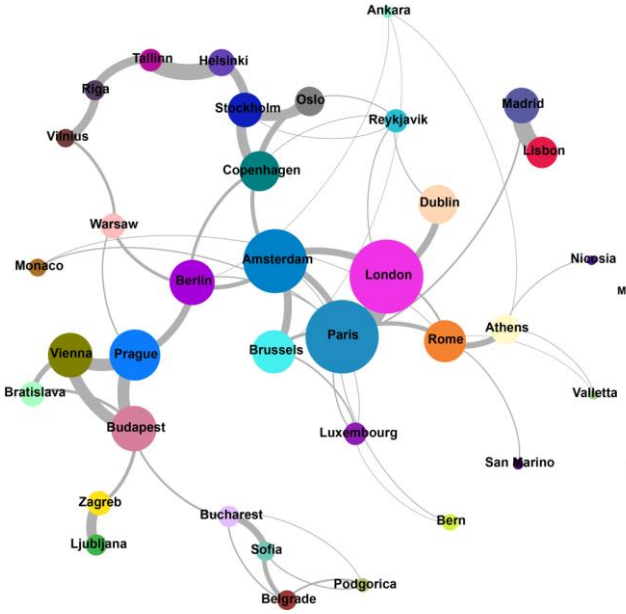


Figure 25. Survey (country combinations)

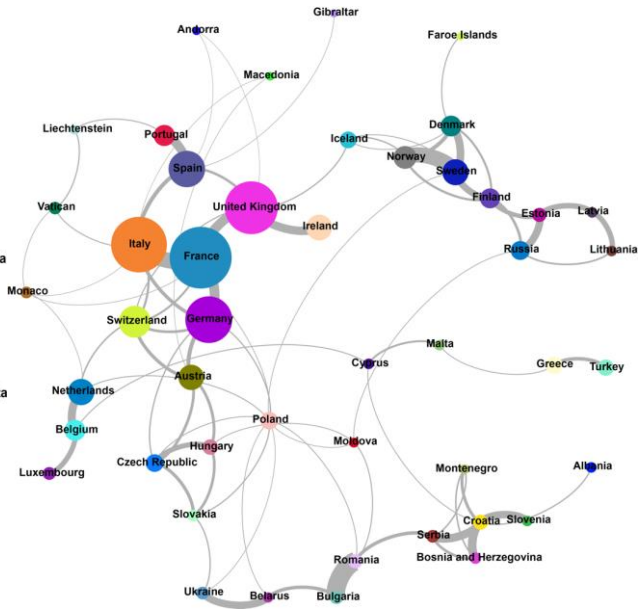
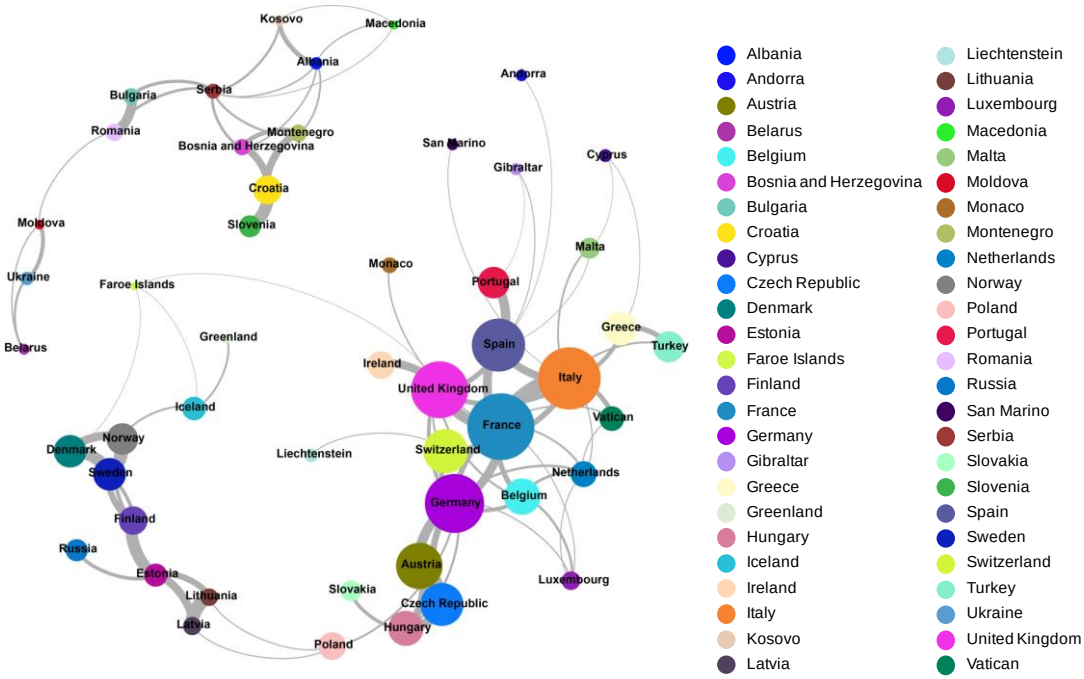


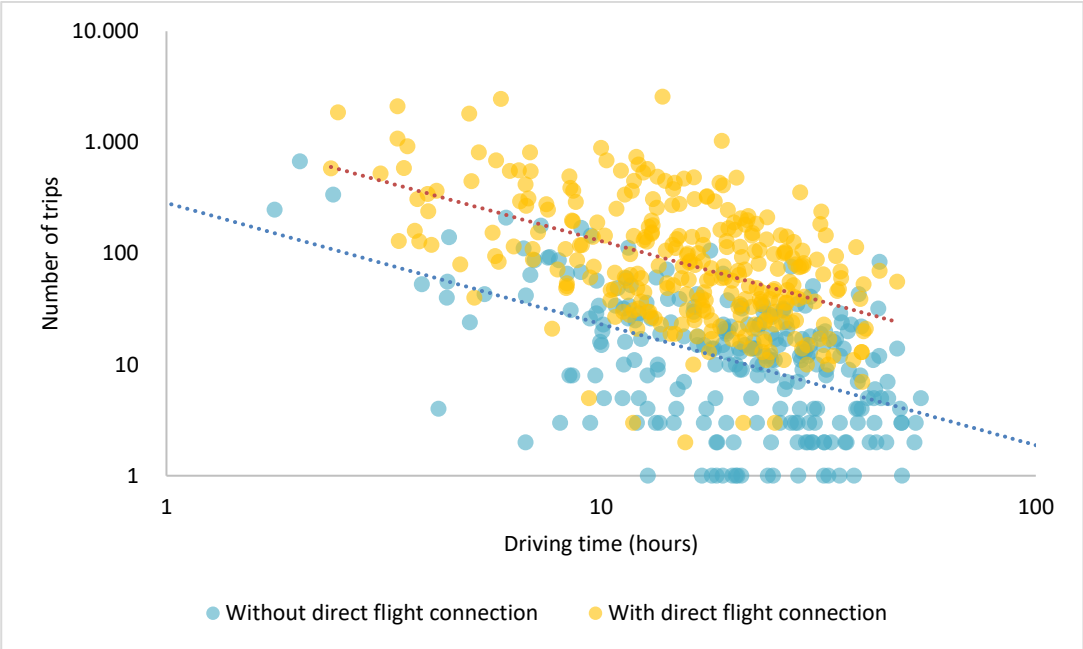
Figure 26. Reviews (country combinations)



3.8 More links between nearby destinations and destinations with direct flights facilitate multi-destination travel in Europe

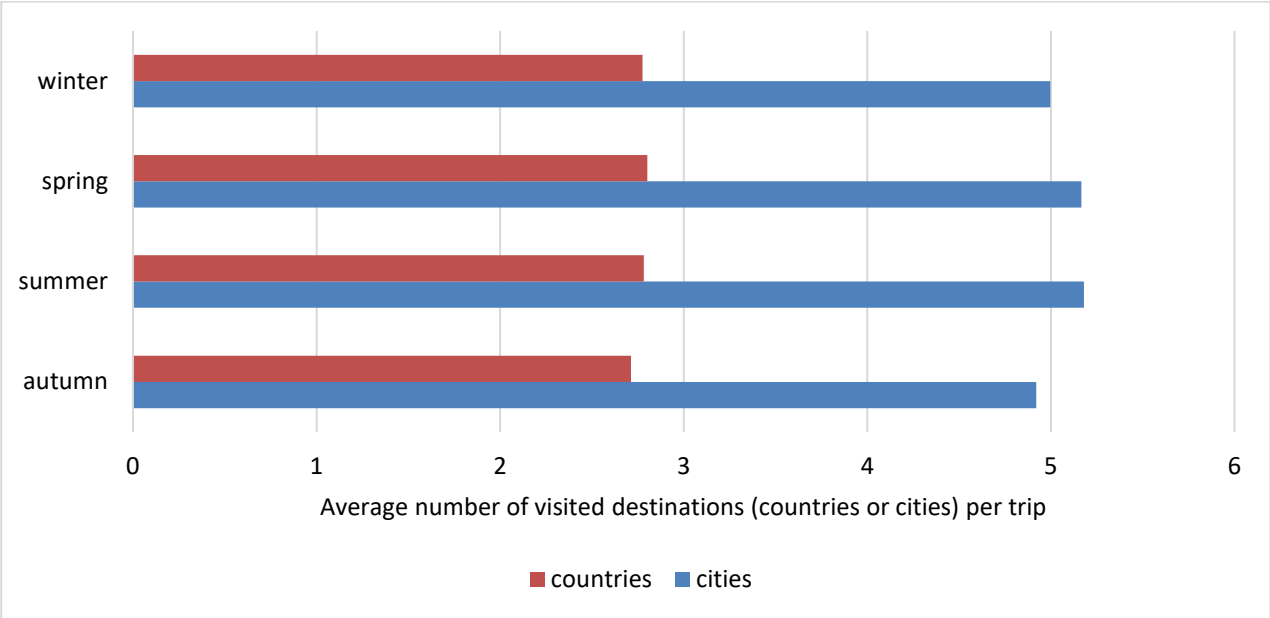
Some patterns can be seen in how often different destinations are combined during a trip in relation to their connectivity. As mentioned in the previous section, the route patterns identified through the analysis of Eurail train trips show different characteristics than the trips identified through other sources. This is most likely so because the mode of transportation affects which destinations are conveniently accessible. In Figure 27, which is based on the review data, pairwise combinations of European capitals are plotted according to how often both capitals are included in one and the same trip and the driving time between them. Not surprisingly, capitals between which tourists can travel by road more quickly tend to be combined more often than others. Pairs of cities between which there is a direct flight connection (plotted in yellow) are also combined more often than others. The causality is not clear, since it might be the case both that travellers choose to travel between cities that have direct flight connections and vice versa (that flight connections are established on routes with large travel flows). A speculation is that established routes and good connectivity for these reasons stimulate each other. Caution should however be taken here, since larger cities tend both to be visited more and to be more likely to have direct flight connections between each other.

Figure 27. Pairs of capitals plotted according to how often they are combined in the same trip according to the review data and the driving time between them. Each dot represents a combination of two specific capitals. The colour indicates whether there is a direct flight connection between the capitals or not.



Season does not emerge as a decisive factor affecting how many destinations are included in a multi-destination trip. As can be seen in Figure 28, the average number of countries in a multi-destination trip is 2.7-2.8 in all seasons. Slightly more cities were on average combined in spring and summer trips (5.2) compared to in autumn (4.9) or winter (5.0) trips. While there are qualitative variations in trip patterns between different seasons, as can be seen in the different seasonal profiles of the clusters in Figures 16-20, seasonality does not affect the extent to which multiple destinations are visited.

Figure 28. Average number of cities and countries visited in different seasons. Only trips including at least two countries were included in the analysis. Seasons have been defined based on which month the first review was made in: winter trips started in December, January or February; spring trips started in March, April, or May; summer trips started in June, July, or August; autumn trips started in September, October, or November. The numbers of visited countries and cities remain similar across seasons.



4. Case studies

This chapter looks at different kinds of cross-border tourism actors. The first is Eurail Group G.I.E., a company providing train passes which provide flexible rail travel through Europe to long-haul inbound travellers to Europe. An analysis of Eurail data complements the results in Chapter 3 with insights in travel patterns seen in a specific category of multi-destination travel in Europe (Eurail train travel). Section 4.2 lists examples of cross-border tourism collaborations around the world, with a closer look at Mekong Tourism, a tourism organisation promoting the Mekong region in South-East Asia as a single destination. The purpose is to highlight examples of how successful cross-border collaborations can be organised, in the light of the challenges involved in establishing such collaborations that have been mentioned in Chapter 1. Actions and activities that allow cooperating destinations to increase their visibility in third markets are noted, and can serve as best practice examples. Section 4.3 provides a comparative analysis of multi-destination and single-destination travellers, provided by Sojern. The analysis is based on 10.6 million trips booked online between December 2015 to May 2018.

4.1 Eurail

The first case study looks into how overseas travellers using the Eurail Pass are moving around the continent. The Eurail Pass lets tourists travel by train (and in some cases other modes of transport) in and between 28 European countries during a validity period that ranges from three days to three months. The Eurail Pass is, like the Interrail pass, managed by Eurail Group G.I.E. which is owned by more than 35 European railway and shipping companies. Its main difference compared to the Interrail Pass is that the Eurail Pass is marketed and sold to overseas travellers.

While travelling, users of the Eurail card are requested to fill out a travel diary specifying between which stations they have travelled, as well as other information including age, nationality and the number of people travelling together. A sample of travel diaries has been used to look at travel patterns in trips made by Eurail travellers from China, India, Japan, and the U.S., which are visualised in Figures 29-32. Similarly to the travel patterns identified through review data presented in Chapter 3, movements are shown on a geographic map and the connectedness of cities is shown as a non-geographic network. Up to 250 cities each visited by at least ten travellers are included in the network visualisations.

Stations located in the same city have been merged in the analysis. In order to include as complete travel patterns as possible, non-reported ‘gaps’ in the itineraries have been filled before the maps have been drawn and the network analyses have been conducted. For example, if a traveller has reported a travel leg from Stockholm to Malmö in Sweden followed by a leg from Copenhagen to Odense in Denmark, then the missing link between Malmö and Copenhagen has been added to the data. Without this modification, Malmö and Copenhagen would (in this example) have appeared less closely connected then what they are in the real trip patterns.

Noteworthy observations from the analysis of travel patterns include:

- The Eurail trips are concentrated in Western and Central continental Europe. The British Isles (up to now not included in the product portfolio of the Eurail Pass) and the Balkans (where railway infrastructure is less developed compared to other areas in Europe) are largely absent from the reported itineraries.
- Paris is the most visited city, but does not have as central role as in the travel patterns identified through review data in Chapter 3. Nearly a half of reported Eurail trips started from one of the top ten stations located in iconic European cities with an international airport. In this scenario, Paris shares its role as a node with cities such as Amsterdam and Munich.
- The most travelled trip legs, among reported itineraries, are found between major tourist destinations in Italy: Florence, Milan, Rome, and Venice.
- Trip legs within Switzerland make up a notably large share of all reported trip legs, which can be seen in the large area covered by Swiss destination in the network visualisations. A likely explanation is that Switzerland is a classic railway country with high-speed connections and a high number of scenic mountain railways between destinations within relatively close geographic proximity.

Figure 29. Travel patterns of Eurail travellers from ***China****.*

The analysis is based on reported travel legs by 470 Chinese Eurail travellers.

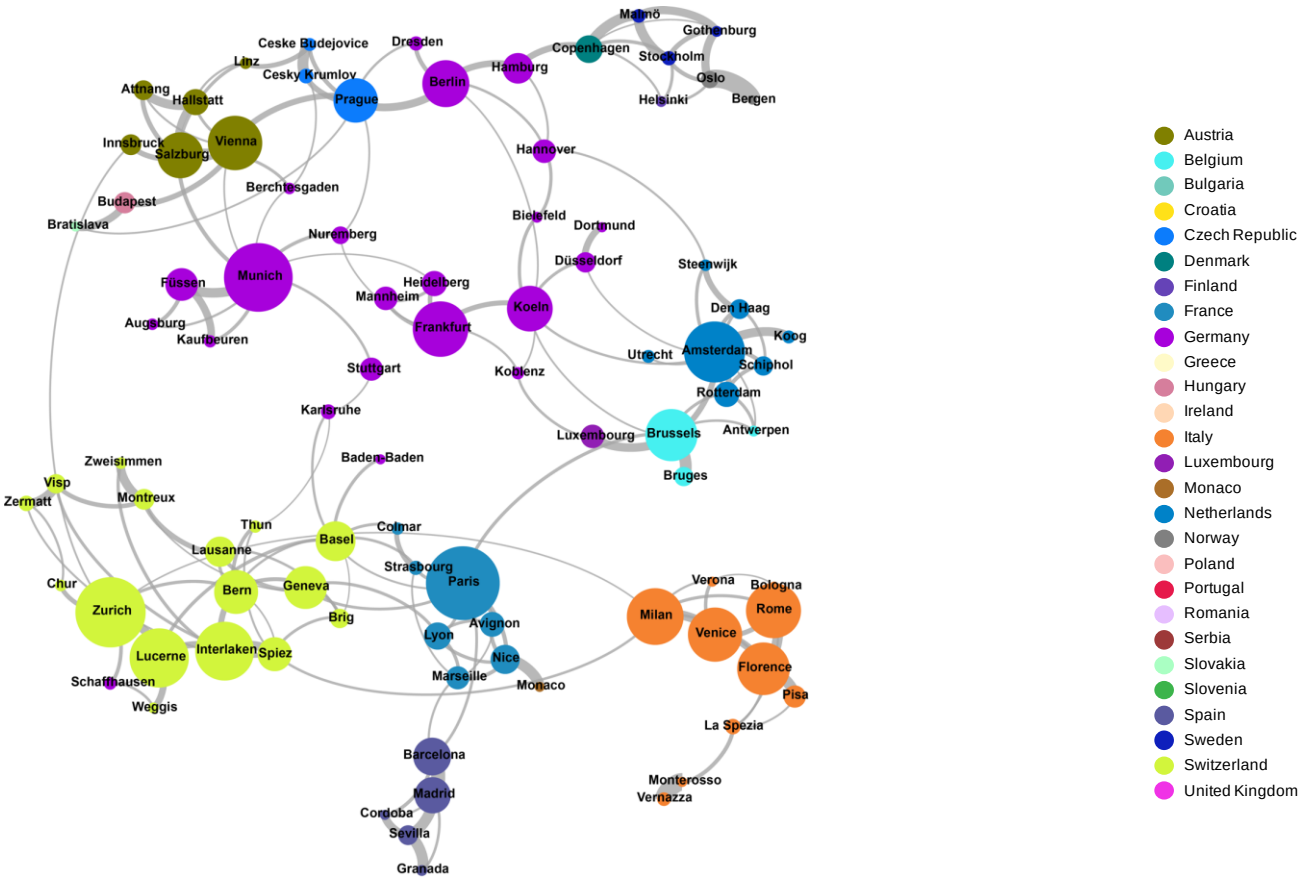


Figure 30. Travel patterns of Eurail travellers from ***India***.

The analysis is based on reported travel legs by 863 Indian Eurail travellers.

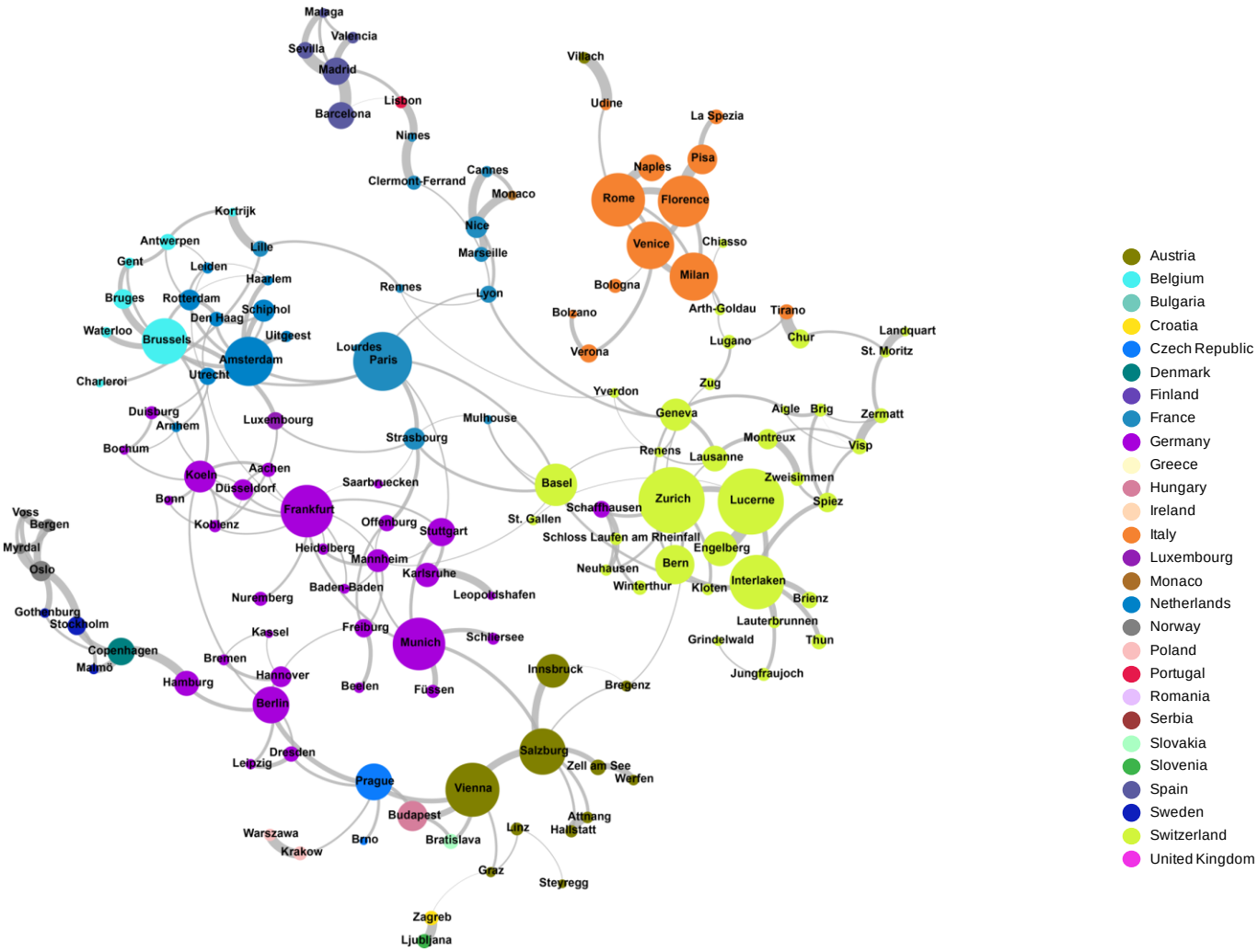
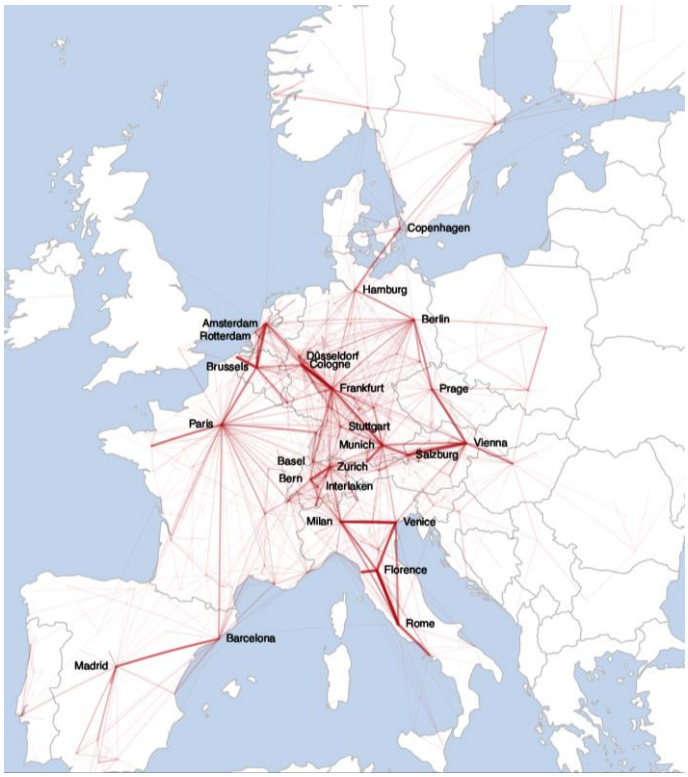


Figure 31. Travel patterns of Eurail travellers from ***Japan***.

The analysis is based on reported travel legs by 1 409 Japanese Eurail travellers.



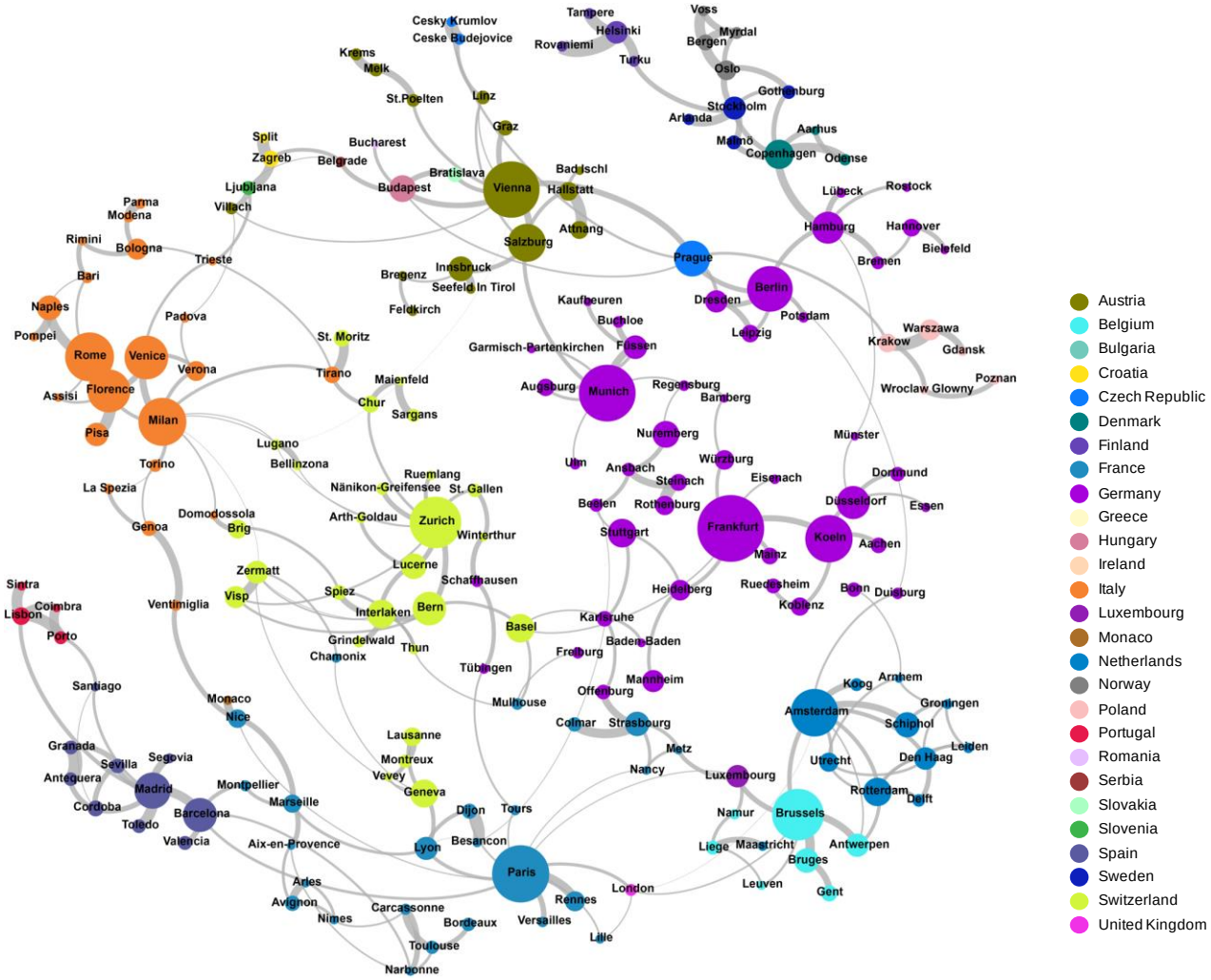
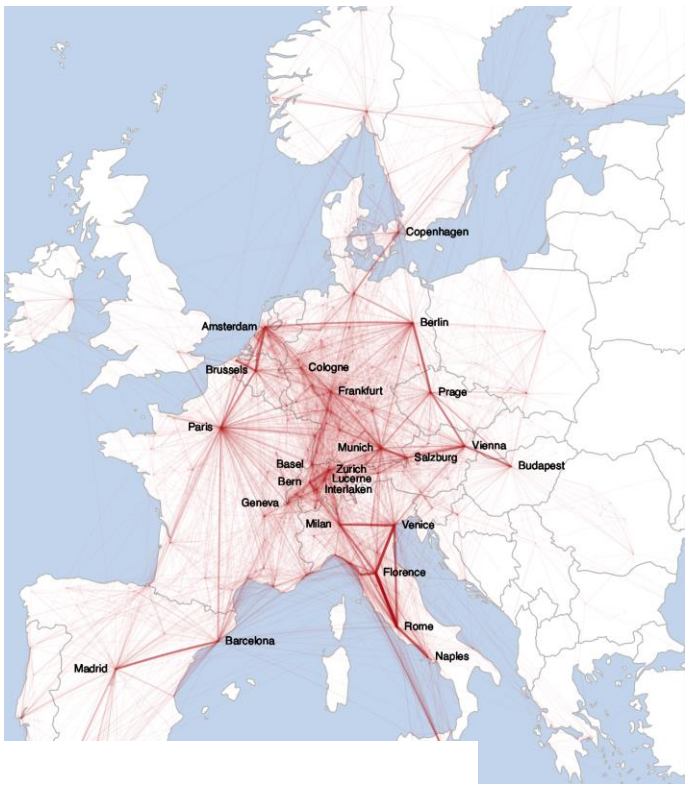
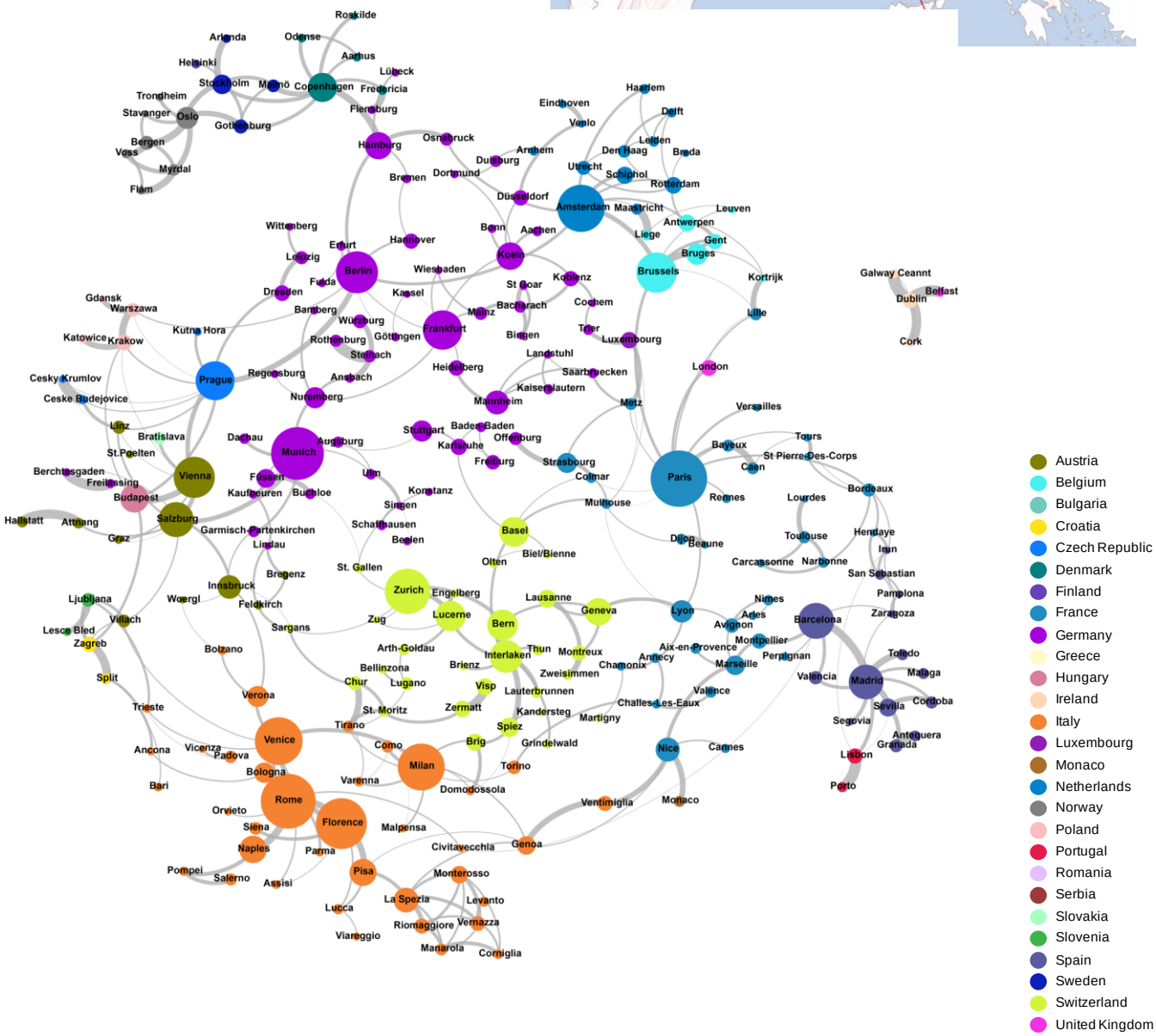


*Figure 32. Travel patterns by Eurail travellers from the **U.S.***

The analysis is based on reported travel legs by 13 115 Eurail travellers from the U.S.





4.2 Examples of cross-border tourism collaboration

Despite the challenges involved in establishing cross-border tourism collaborations, successful cases of cross-border collaboration do exist around the world. Table 3 below provides an overview of seven examples, and in Section 4.2.1 a closer look is taken at the South-East Asian collaboration in the Greater Mekong Sub Region.

Table 3. Examples of cross-border tourism collaboration

	Official organisation or programme	Included countries	Stated goal
Greater Mekong Sub Region	Mekong Tourism Coordinating Office (MTCO)	China, Myanmar, Thailand, Laos, Cambodia, Vietnam	'[D]evelop and promote the Mekong Region as a single destination, offering a diversity of good quality and high yielding sub regional products' and 'support multi country tourism in the GMS by stimulating demand from high yield markets through appropriate product development and joint promotional activities'.[19]
Southern Africa	Regional Tourism Organisation of Southern Africa (RETOSA)	Angola, Botswana, DRC, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe	'To make Southern Africa the destination of choice in the world by 2027' through 'removal of barriers to the free trade in tourism services across member-states' borders'[20]
Øresund region	Greater Copenhagen & Skåne Committee	Sweden, Denmark	Making it easy for tourists to experience the entire metropolitan area[21]
Poland-Russia	Poland-Russia Cross-border Cooperation Programme	Poland, Russia	'Joint creation of tourist products respecting the need to protect cultural, historical and natural heritage'[22]
Kvarken region	Botnia-Atlantica programme	Sweden, Finland	Developing sustainable joint cross-border tourism packages so tourists can make tours in the mutual region[23]
Greater Tumen Region	Greater Tumen Initiative (GTI)	China, Russia, South Korea, Mongolia	'[T]o create an environment that facilitates an increase in the number of cross-border visitors to the GTR' e.g. through 'simplification of frontier formalities, including tourism visa procedures, developing a common visa arrangement between the member countries'[24]

4.2.1 Mekong Tourism

In the Greater Mekong Sub Region in South-East Asia, the governments of six countries have entered into a tourism collaboration framework with the stated goals of promoting the region as **a single travel destination** and developing **a sustainable tourism sector**. A number of innovative programs have been introduced as part of the collaboration, several of which **facilitate and promote cross-border travel** in the region.

At the centre of the collaboration is the Mekong Tourism Coordinating Office (MTCO), which is funded by the member countries Cambodia, China, Laos, Myanmar, Thailand, and Vietnam and headed by Executive Director Jens Thraenhart, who has shared information about the collaboration for this report.[25] The MTCO is guided by a Tourism Working Group, made up of senior officials from the member countries' national tourism organisations. The working group formulates strategies and workplans, and is also involved in establishing multi-country travel routes that are promoted through the collaboration, while the role of the MTCO includes developing and coordinating joint programs in line with the working group's strategies and plans. (A selection of these programs is presented below.) The MTCO is however not executing any programs itself; the programs are instead run by Destination Mekong, a public-private partnership which was founded in 2017 after a range of collaborative programs were already in place.

One prominent project run through the collaboration is **Mekong Moments**, an online **marketing platform** targeting travellers with **inspirational visual content from social media platforms**. As a collaborative marketing project involving travellers as well as small and large businesses, Mekong Moments aims to build the brand of the Mekong through shared experiences from the region. Participating businesses, such as hotels and restaurants, encourage travellers to contribute to the content with their own experiences, e.g. through adding certain hashtags to their social media posts to let them be picked up by the platform. An important feature of Mekong Moments is to serve as **a capacity-building tool**, which it does by providing participating tourism businesses with an advanced and visually appealing platform for reaching out to potential visitors. Thraenhart emphasises the platform's aim to 'lift' the smallest businesses, which have little in-house resources for digital marketing. Clones of Mekong Moments can be created for smaller areas, and individual tourism businesses can choose to build their own professional-looking websites on top of it.

Image 1. The Mekong Moments platform. (Courtesy of the MTCO.)

Several new functions are currently being built into the Mekong Moments platform, including tools to build destination loyalty programs and customise destination cards to individual travellers with relevant offers on the destinations they are visiting based on their interests and travel timeframes. Two planned functions with relevance for multi-destination tourism are a **trip planner** that can be used by travellers, and a **tool for building thematic multi-country tours** in which local businesses can be integrated and promote as well as be promoted by the tour.

Outside of the platform, tourism in the region has also been promoted by recurring **cross-border sport events** in the form of 'The Golden Triangle Triathlon' in the border region of Laos, Myanmar, and Thailand. Other collaborative programs coordinated through the MTCO include an annual **'Mekong Mini-Movie Festival'**, in

which anyone can participate with a one-minute film promoting the region, and the **start-up accelerator** and market access program 'Mekong Innovative Startups in Tourism'.

Promoting the Greater Mekong Sub Region as a single destination is one of two overarching goals for the Mekong Tourism collaboration. Thraenhart describes capacity-building programs such as Mekong Moments as one way of building a single destination. Other means of integrating the tourism infrastructure in the region include improved air access – something over which the MTCO has no direct influence, but that is likely to be improved following an increased demand of travelling to and within the region.

The other main goal of the collaboration is to promote a responsible and sustainable tourism. This is partly done through stimulating **dispersal of visitors** over a larger region by promoting and increasing the marketing capacity of less travelled areas. Another means is to **'push' travellers into the local communities** by helping local business promote themselves – thereby contributing to the wealth generated from tourism being spread more evenly. A third way in which sustainable tourism is promoted through the collaboration is by **showcasing good examples** of how tourism businesses can work in a sustainable way. Thraenhart points out that it can often be easier said than done to work sustainably – for example by hiring locally – and that the **Experience Mekong Collection** has for this reason been established to collect and show best practices to the industry. Anyone can nominate responsible businesses through its website, among which an advisory group of tourism professionals select the ones that feature in the collection.

4.3 How multi-destination travellers differ from single-destination travellers

This case study is a contribution from Sojern, one of ETC's associate members.

4.3.1 Introduction

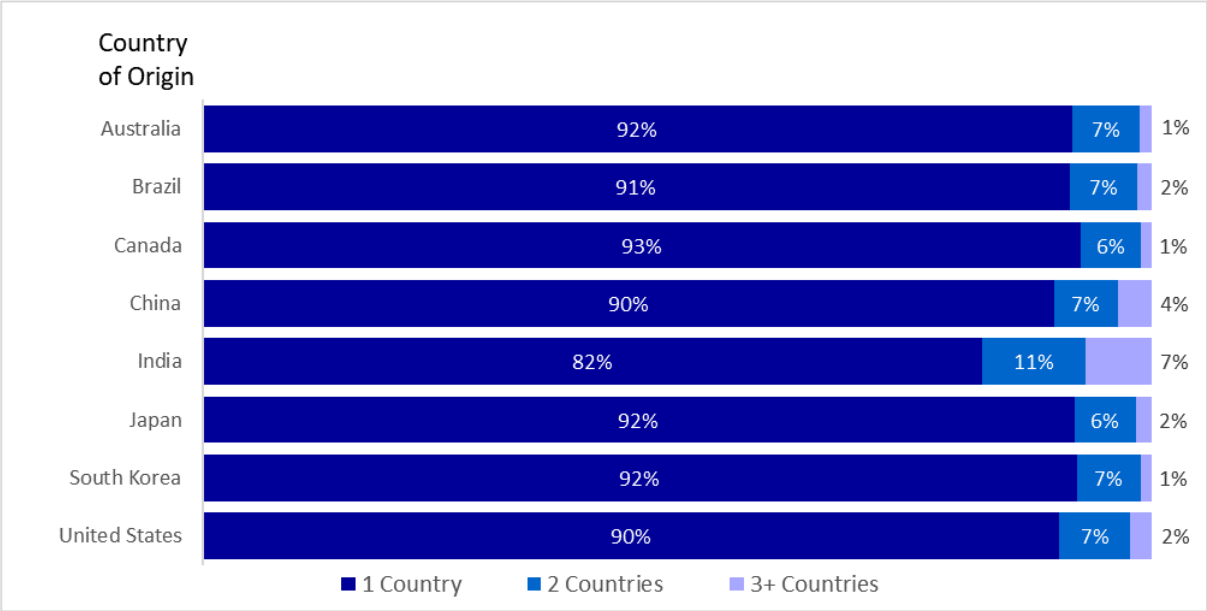
Sojern is Travel's Direct Demand Engine. Specializing in traveller path-to-purchase data for over a decade. The company activates multi-channel branding and performance solutions built on predictive data science, billions of search and booking intent signals, and real-time analysis of the world's traveller profiles.

As part of this project, Sojern analysed 10.6 million trips from online booking data across all travel verticals from eight key markets for travels to Europe booked between December 2015 to May 2018. The focus of this contribution is to evaluate in what ways do Europe-bound travellers differ when they visit only one or more countries during their trip.

4.3.2 Sizing up the market of multi-destination trips to Europe

The vast majority of trips to Europe in Sojern's data are single-country trips (Figure 33). Since the data covers online direct and intermediary bookings, many trip occasions are included. A key factor here are business trips and family/friends visits which skew towards single-country trips.

Figure 33: Distribution of bookings by the number of countries booked in Europe (Dec'15 – May'18)



4.3.3 Country profiles

Next, the popularity of European countries was analysed depending on whether they are part of a multi-destination tour or a single destination trip (Figure 34).

Across the eight countries of origin there is typically an 'anchor' destination in Europe which is easy to reach from the origin due to historic and economic ties and is the top destination in Europe overall. For instance, the UK is the anchor destination for travellers from English-speaking countries.

What can be seen when more destinations are added to the itinerary is that the anchor destination can be replaced as top destination by another country. The UK is the top overall destination for Chinese travellers. But when at least three countries are visited in Europe, Italy becomes the most likely country to be visited. Similarly, Germany becomes the top destination for trips involving at least two European countries for Japanese travellers.

Figure 34: Distribution of bookings by destination country, split by the number of destination countries booked in Europe

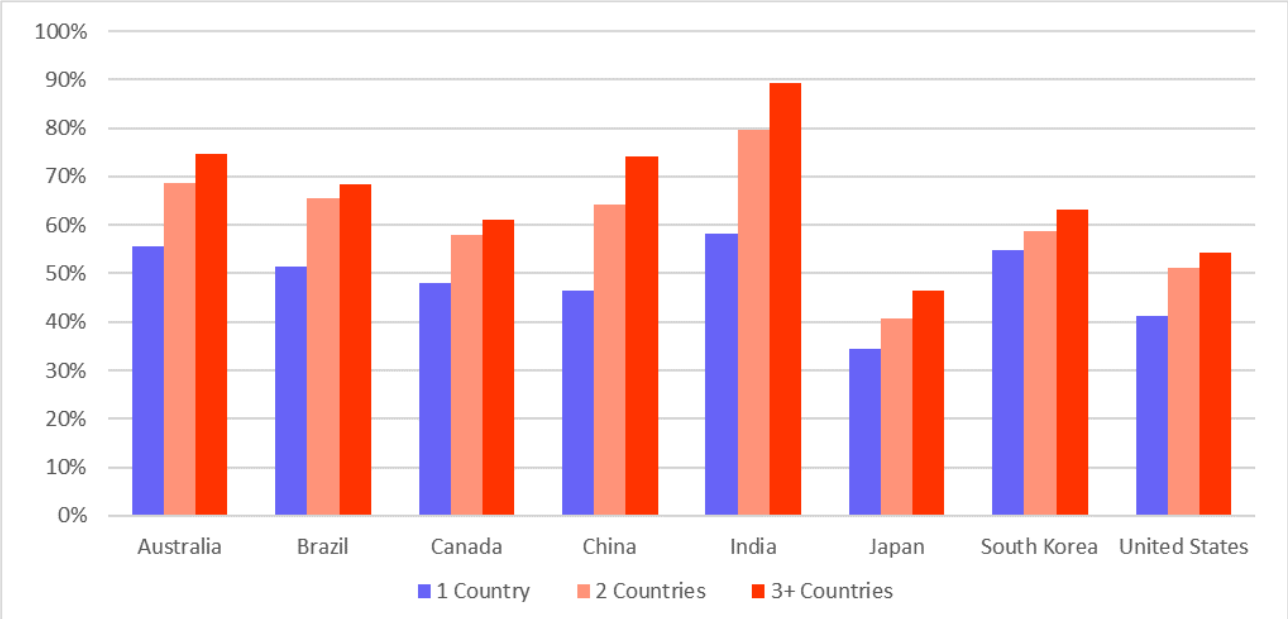
4.3.4 Trip parameters

When travellers from overseas markets come to Europe and visit multiple countries, chances are high that they do not come alone. For all eight countries of origin the share of party sizes of two or more travellers increases when more countries are visited (Figure 35).

Travellers from India that visit at least three European countries are not alone in almost 90% of cases, whereas Japanese visitors on a similar trip are more likely to travel solo (53%).

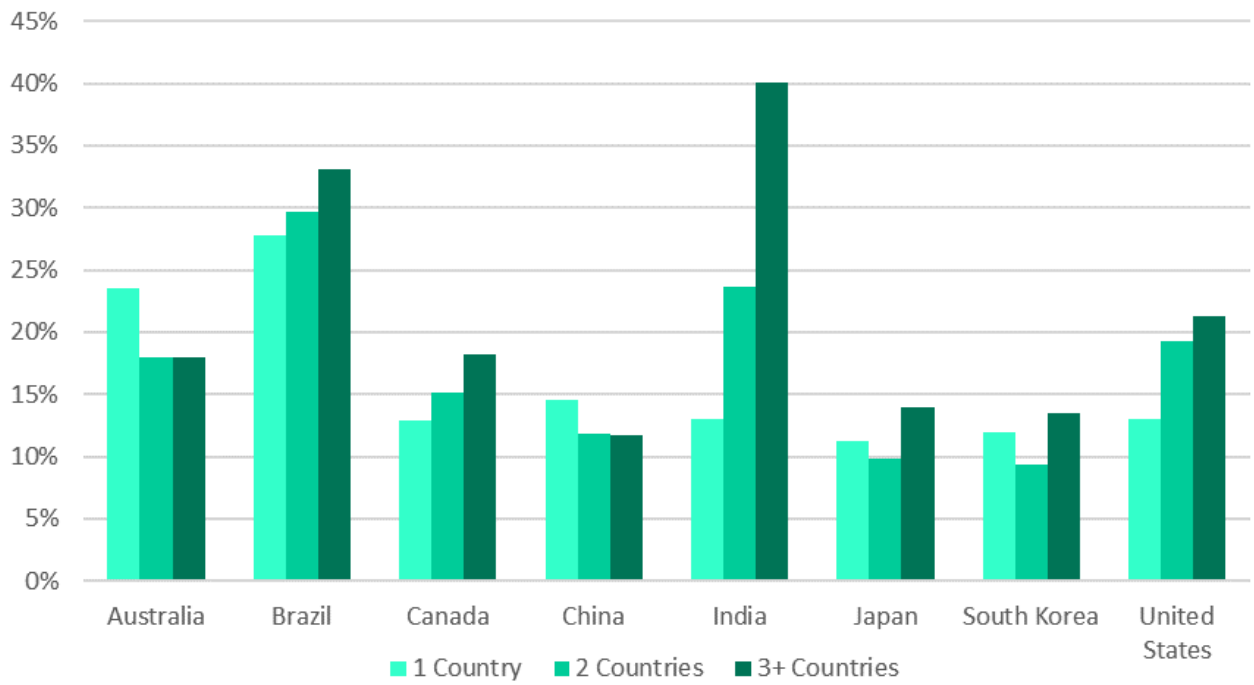
Surprisingly, lead times – the time between booking and departing for Europe – are stable irrespective of the number of destinations. Overall trip durations do increase with more countries being visited, albeit not in an additive way, i.e. travellers do not stay twice as long in Europe when visiting four countries vs. only two countries.

Figure 35: Share of bookings made for at least 2 travellers by the number of destination countries booked in Europe



In Figure 36 (please see next page) the prevalence of extra-long trips, defined as having a duration of at least 21 days, is depicted. There, Australia and China stand out as countries where the share of long trips is actually larger for single-destination trips than for multi-destination ones.

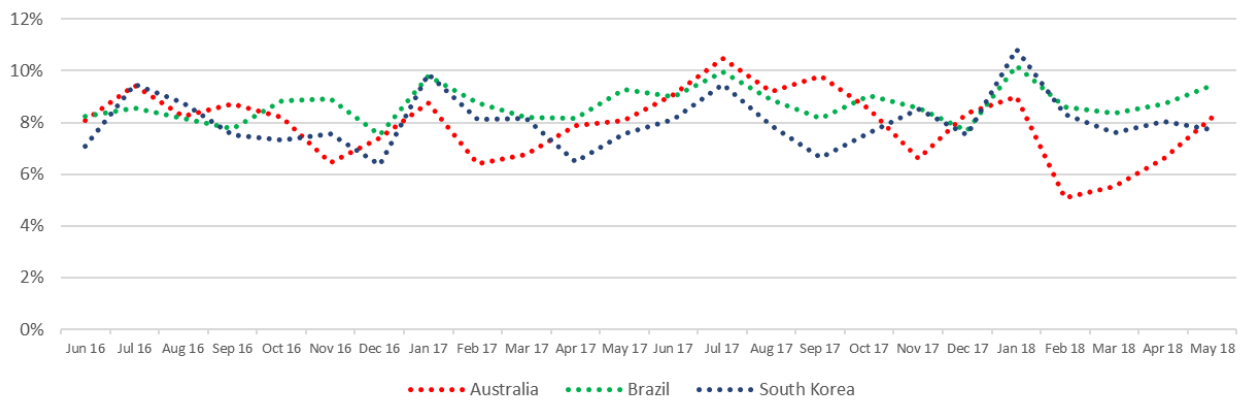
Figure 36: Share of bookings made for trip durations of at least 21 days by the number of destination countries booked in Europe



4.3.5 Time Effects

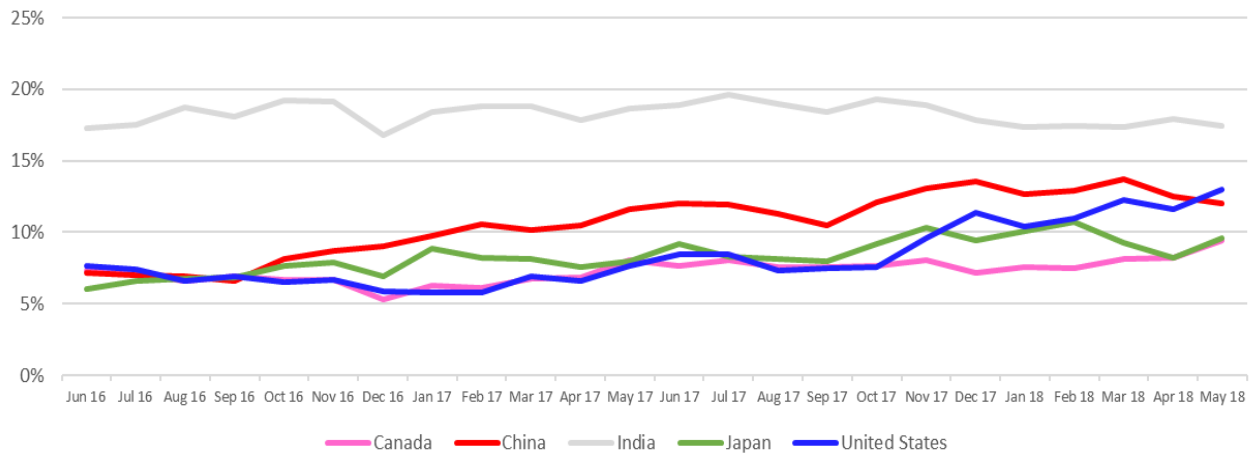
When looking at multi-destination trips over time (Figure 37), there are two peculiarities: seasonality and growth. Bookings for multi-destination travels in Australia, Brazil and South Korea show clear seasonal travel patterns: highs during the summer and lows during winter with an exception for January arrivals (Summer in southern hemisphere, public holidays in Korea).

Figure 37: Share of bookings made for trips with at least two European destination countries by arrival month June 2016 to May 2018. Australia, Brazil and South Korea



While multi-destination trips remain popular among Indian travellers, there has been a slight down-ward trend since the beginning of 2018. The remaining countries of origin have seen growth of the multi-destination segment over the last two years (Figure 38).

Figure 38: Share of bookings made for trips with at least two European destination countries by arrival month June 2016 to May 2018. Canada, China, India, Japan, United States.



Another interesting angle is to compare the seasonality of single vs. multi-destination trips to Europe. As shown in Figure 39, for most countries there is no big difference between the two. Exceptions are the US and Australia. Also, Australia and India over-index multi-destination trips in summer and autumn, whereas most other major overseas countries over-index in the colder months.

Figure 39: Monthly ratio of multi-destination vs. single-destination trips. A positive percentage indicates multi-destination trips are relatively more popular in the given month of departure.

Dep. Month	Country of Origin							
	Australia	Brazil	Canada	China	India	Japan	South Korea	United States
Jan	10%	21%	1%	3%	-3%	15%	38%	14%
Feb	-42%	-4%	0%	7%	-6%	24%	2%	20%
Mar	-35%	-3%	8%	31%	-5%	8%	-7%	41%
Apr	-23%	-2%	9%	7%	-3%	-6%	1%	31%
May	-6%	3%	3%	-6%	-2%	-20%	-8%	-29%
Jun	6%	-1%	-3%	2%	2%	-3%	0%	-20%
Jul	25%	12%	0%	-7%	7%	-13%	17%	-21%
Aug	8%	0%	-5%	-13%	4%	-13%	-3%	-32%
Sep	16%	-9%	-5%	-21%	-1%	-13%	-21%	-30%
Oct	0%	1%	-4%	-8%	7%	2%	-8%	-29%
Nov	-25%	-3%	4%	-4%	9%	17%	5%	2%
Dec	0%	-13%	-5%	11%	-5%	13%	-11%	36%

5. Conclusions and recommendations

A large share of inbound long-haul tourists to Europe are multi-destination travellers. Among the travellers from China, India, Japan, and the U.S. who have been surveyed in this study, **60%** visited more than one country during their most recent trip to Europe. Tourism organisations and businesses need to be aware that their destinations are more likely to be just one part of their visitors' trips; they therefore have several reasons to establish collaborations with partners in other countries. For smaller destinations (on either country or city level), the primary reason is **enhanced visibility**: through international collaboration and joint marketing, a cross-border region can become more attractive in the eyes of overseas travellers who would otherwise have opted for larger and more well-known destinations. An individual destination can also become more attractive by **finding its place within established travel routes** that are already popular among travellers. For countries with one or a few very popular destinations which are near their capacity limit, another reason to stimulate multi-destination tourism is to **disperse visitors over a larger area**.

As a destination management organisation/institution, it is important to understand how tourists are actually travelling between destinations, not only for identifying potential partners but also for understanding one's place within established travel routes. Travellers typically follow different logics than NTOs do. While NTOs are naturally nation-oriented, long-haul multi-destination travellers are less restricted by national frontiers. This does not mean, however, that there are no patterns in the itineraries used. To the contrary, there are several 'backbones' or standard routes that a large share of travellers use, both on a European and on a regional level, as well as cross-border clusters of cities that are often combined with each other.

To help tourism organisations at national, regional and local levels understand what the spatial travel patterns among today's long-haul tourists look like, **this report maps travel patterns within Europe of tourists from China, India, Japan, and the U.S.**, using data from online review sites and a number of other sources. These patterns can be used in different ways by tourism actors. First, national tourism organisations in Europe can find a heatmap focusing on each country in the Annex, showing the shares of the identified cross-border trips that include other countries. **The other countries that a country is most typically combined with can be considered obvious candidates for collaboration.**

Understanding multi-destination tourism is however not only about knowing which countries are most typically combined with each other. **Other factors to consider include a country's position in the multi-destination travel network** – is it a node that is frequently combined with many other countries, or is it positioned in the periphery with only a few links to the rest of Europe? Equally important to consider is what the cross-border links look like at the city-level. Some countries have several border regions in which travellers frequently combine destinations with places in other countries, while visitors to other countries typically arrive through the capital and visit other domestic destinations as side-trips (the former should consider establishing local or regional collaborations in the border areas to leverage the particular network positions of city-level destinations there). Yet other countries can discover that **some of their cities are integral parts of travel routes of a neighbouring country**, while being virtually disconnected from other domestic destinations. Some cities hold a **'gateway' position**, linking cities from two or more different clusters with each other. This includes node cities such as Paris, but also for example Brussels and Luxembourg that together link French, German, and Dutch destinations, or Lisbon which is a typical entry point for travellers to Portugal. To get more detailed insights of this kind, and insights about a specific destination's position and connections, it is recommended to study the **network based on online reviews that is visualised in Figure 14** in Chapter 3 of this report (and, for Eurail trip patterns, the networks in Figures 24-26). Key take-aways are listed in Section 5.1 below. On a country level, it can be motivated to establish different forms of collaboration with different neighbouring countries based on how a country is connected to other countries in the trip pattern, which is something the Figure shows. In addition to the network visualisations, **13 distinct itinerary clusters in different parts of Europe are listed in Section 5.1 below and presented in more detail in Sections 3.4.3-3.4.7**.

Forming cross-border collaborations aligned with established multi-destination travel patterns is a low-hanging fruit once those patterns are known, and joint promotion of existing cross-border routes will contribute to strengthening tendencies that are already in place. **A different option is to locate 'holes' in the**

travel networks and identify the reasons of why some routes are less frequently travelled (what is holding back travellers from including destination Y in a trip to destination X?). Based on such knowledge, measures can be taken to gradually establish new travel links and 'move' a destination towards a more central position in the travel network. While a long-term commitment is beneficiary in most forms of collaboration, it is even more important when in this way promoting routes that are not (yet) in line with established travel patterns.

Options for how to build long-term structures for cross-border collaboration include **forming collaborative frameworks on a national level** and running international programs through these, for example for joint marketing and capacity-building. This is the path taken by the Mekong Tourism framework (introduced in Section 4.2). Another option is to **establish local or regional cross-border programs together with city- or region-level partners in neighbouring countries**, and integrate these as parts of national tourism strategies. Collaborations can be either of a general and overall kind, which digital platforms for brand building such as Mekong are examples of, or limited to joint cross-border products connected to a specific theme.

5.1 Identified overall multi-destination travel patterns

The below observations are key take-aways from the network and factor analyses of multi-destination trips identified through online reviews. Several points refer to neighbouring countries being closely linked in the analysed trips and might appear obvious. It is however equally important to note connections that are weak or absent, for example that the Netherlands is not closely connected to Germany in the analysed trips or that Copenhagen is much closer linked to Stockholm than to Hamburg. NTOs and DMOs are recommended to study the maps and networks presented in Chapter 3 and the Annex themselves to see the positions and links of their own destinations.

- **A high concentration of the multi-destination trips** identified through the online reviews are made within an area in the triangle London-Rome-Budapest.
- A small number of city-level destinations are positioned as **nodes in the travel network**. Paris has a special position as a principal node for all of Europe, and is strongly connected to other major European destinations while being relatively weakly connected to other destinations in France. Secondary nodes that have central positions in different regions include Barcelona, Copenhagen, London, Munich, Paris, Prague, and Rome.
- **The countries in Western Europe are closely tied to each other** and relatively closely connected to Central European countries and Poland. Countries in three different areas are well-integrated with each other but largely separated from Western and Central Europe. They should **be candidates for collaboration** on a national level:
    - **The Nordic and Baltic countries**. Connections are especially strong between the Baltic countries, between the Scandinavian countries, and – in particular – between the cities Helsinki and Tallinn.
    - **The countries on the Balkans**. Eastern and Western Balkans make up different sub regions, with Serbia as a link between them.
    - **Greece and Turkey**, where many travellers combine Istanbul with Athens or Greek islands.
- **European countries show different levels of integration with the countries around them**. Central Europe is for example an especially well-integrated area. At a country level, Germany is particularly well-connected with most of its neighbouring countries.
- In some parts of Europe, such as in and around Switzerland, there is a large number of different itineraries. Other regions feature **distinct main routes or 'backbones' that form itinerary clusters**. 13 such distinct itinerary clusters are presented in Sections 3.4.3-3.4.7. **Cross-border collaboration should be considered between the clusters' countries and cities**:
    - *Western Balkans*: combining southern Croatia's coast with destinations in Bosnia and Herzegovina, Montenegro, and Slovenia.
    - *Eastern Balkans*: combining inland destinations in Bulgaria and Romania such as Bucharest, Brașov, Plovdiv, and Sofia with side itineraries to Belgrade, Budapest, and Istanbul.
    - *Aegean Sea*: centred on Athens and Santorini, which are combined with Turkish destinations

including Istanbul and Cappadocia or Italian destinations including Rome and Florence.

- *Ireland+*: centred on Dublin and other destinations in the south of Ireland, but also incorporating Northern Ireland and London.
- *Britain+*: Edinburgh, London, and Paris make up the backbone of this cluster, which also incorporates destinations across Great Britain.
- *Bavaria+*: combining Munich with other destinations in south-eastern Germany and in Austria, with side tours to Berlin, Paris, and Prague.
- *Central Europe*: combining major destinations in Austria, Czech Republic, Hungary, and Slovakia.
- *Poland+*: centred on Warsaw, Krakow, and towns surrounding the latter, the cluster incorporates destinations across Poland as well as Berlin, Budapest, and Prague.
- *Portugal+*: spanning the Iberian west coast from Lisbon to Santiago de Compostela, which are frequently combined with London.
- *Spain+*: combining destinations in Andalucía and around Madrid with Barcelona, Valencia, and Lisbon. Often combined with Paris.
- *Norway and Scandinavian capitals*: combining Norwegian destinations with the capitals of Denmark and Sweden.
- *The north*: combining destinations in the Arctic region of northern Finland, Norway, and Sweden with Helsinki and Stockholm.
- *The Baltics*: Vilnius, Riga, Tallinn, and Helsinki are the backbone of the cluster, which also incorporates smaller destinations in the three Baltic countries.

- The general trip patterns are similar between the analysed overseas markets, but there are also differences:
  - The Arctic region in Northern Scandinavia is featured more in the itinerary network of the Chinese and Japanese markets.
  - There is a stronger cross-border network of Irish destinations in the U.S. market.
  - There is a stronger cluster of Greek and Turkish destinations in the Indian market.
- Compared to the trips identified through the data-mining of travel reviews, an analysis of tour packages marketed in the four studied markets shows that the packaged tours are more distinct and focus on a smaller number of main routes. The analysis is presented in Section 3.5.
- The routes of Eurail train travellers show a higher connection within Western continental Europe compared to the review data, but a high level of variation in itineraries within this area.

Annex

Two previous studies of multi-destination travel patterns

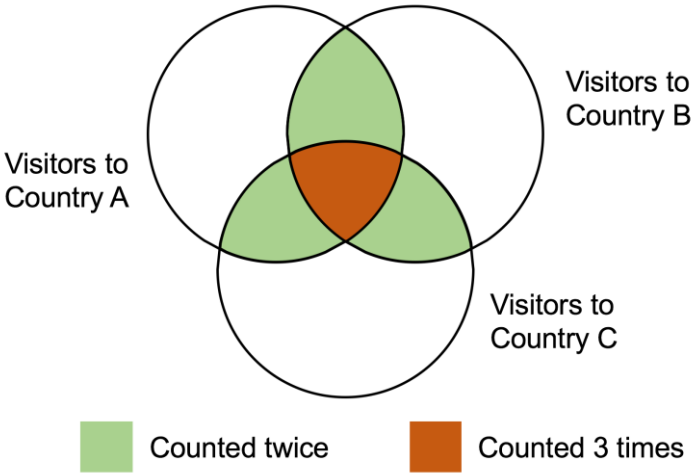
Previous studies looking into multi-destination tourism suggest that travellers' movements between destinations is an under-researched field. Studies of multi-destination travel patterns that have been published in the last five years include one survey study of travel patterns within the Italian island of Sicily[26], and one study of travel patterns within Austria based on social media posts.[27] The latter study was similar to the study presented in this report (although limited to travelling within Austria) and mapped clusters of destinations based on photos that travellers posted in social media. Conclusions included that there are two major and largely unconnected clusters of destinations within the country, and that more trips had a 'base camp' pattern (30%) than a 'regional tour' pattern (13%). (See section 1.3.1 for the trip typology by Lue et al.) A majority of trips (57%) were however classified as 'single destination' – but this might be misleading since the study did not consider whether a single destination within Austria was combined with destinations in other countries. The author, Dr Irem Önder, calls for a similar multi-destination study to be made taking in more countries and different seasons. (This report provides such a study of itineraries across Europe of travellers from four important long-haul markets.)

The study of travel patterns in Sicily, by Parroco et al, was made through a survey of travellers departing from the island through ports and airports. The researchers could see that most trips are connecting a few major destinations along the coasts, but also that there are several smaller networks of secondary destinations – knowledge of which could be used for dividing the island into different tourism regions from a demand perspective. Other conclusions included that first-time visitors are more likely to do a multi-destination trip, and that the same holds true for visitors who have other interests than sunbathing.

Challenges in tracking multi-destination travel in Europe

The authors of the Sicily study argue that the preconception of single-destination trips being the norm has led to a problem in international tourism statistics: individual inbound travellers are sometimes counted multiple times during one and the same trip. This happens because arrivals tend to be counted at a local geographic level (such as arrivals to hotels), only taking the local destination and travellers' home countries into account. When an inbound tourist visits several towns or cities during the same trip, tourism statistics for the country in question will then count him or her once for each hotel he or she has arrived to. The problem gets more severe the higher the geographic level that arrivals are summed for – according to Parroco et al it is especially a problem for visitor statistics for Europe as a whole.[28] The fact that this way of counting is sometimes used might to some extent explain why different sources indicate significantly different figures for arrivals to Europe from certain markets. For example, the number of yearly visits from Japan has been estimated as 2.75[29] as well as 4.19[30] million. Figure 40 illustrates the problem of multiple counting that happens when arrivals to individual countries are summed.

Figure 40. The problem of double counting in tourism statistics. If the sum (rather than the union) of arrivals to different countries is used to estimate the number of arrivals to a larger area – such as Europe – then a traveller on a cross-border multi-destination trip will be counted once for each country that he/she visits, resulting in inflated numbers.



The focus on single-destination travel can also be seen in the fact that the European statistics on tourism has not been including data such as average number of visited countries per trip.[31] The lack of precise statistics regarding the volume of multi-destination trips in Europe means that monitoring the evolution of multi-destination travel in Europe becomes more challenging for tourism bodies. Additional sources should therefore be considered for keeping track of the multi-destination travel market, such as data from airlines and train operators, and/or data from travel agencies and tour operators that organise multi-destination trips. Another option is to conduct repeated or continuous studies of multi-destination travel through online footprints in social media or on travel review sites, in line with the study presented in this report.

Survey methodology

An online survey was conducted among travellers from China, India, Japan, and the U.S. All surveyed travellers have visited Europe during the last five years. To achieve this, a screening was done by presenting members of a larger panel with a list of countries and regions around the world and asking which they had visited during the time frame. 600 respondents in each country who selected one or more European countries were included in the survey. A second screening was then conducted to filter out responses appearing to be of low quality, including from respondents using a very short time to answer the survey question. 2,091 respondents remained after the second screening.

The survey included questions relating to reasons for travelling to multiple destinations, travel group composition, the degree of independence when planning trips, previous experience of travelling to Europe, and general travel attitude. Trip patterns (used to validate findings from the analysis of online reviews in Chapter 3) were identified through an open question about which countries were visited during the most recent trip to Europe. Respondents were also asked to rate how attractive they find trips within the destination clusters identified through the analysis of online reviews.

The multi-destination travellers among the respondents were categorised along different dimensions, including the number of visited destinations, travel group composition, and booking behaviour. In Chapter 2, charts are presented that highlight interesting findings in the form of patterns in how different variables affect each other. Cross-tabulation was used to identify patterns in the data.

Data mining methodology

Collection and structuring of data

A data mining study was conducted based on online reviews of travel attractions from prominent travel review platforms in China, India, Japan, and the U.S. The data was collected and structured in the following way:

1. Travellers who have reviewed at least one attraction either in one of ETC's member countries or in France, Sweden, or the U.K. during the last twelve months were selected.
2. All reviews written by these travellers of attractions in Europe (including Anatolia, the Azores, the Canary Islands, Greenland, Madeira, and Russia west of the Ural) were collected. This resulted in a collection of ~1 million reviews from each of the four markets. 3 million of the reviews were from attractions in Europe.
3. Reviews posted shortly after one another were identified as belonging to the same trip. The trips' seasons were determined using the month of the first review from a trip: winter trips started in December, January or February; spring trips started in March, April, or May; summer trips started in June, July, or August; autumn trips started in September, October, or November.
4. Trips taking place solely within a single country were filtered out. 40,434 identified cross-border trips remained after the filtering. Information about the trips (including included cities in the order they were visited in, included countries in the order they were visited in, season, average rating score in the reviews, and the traveller's nationality) was stored in a tap-separated text file with one line used for each trip.

The above data structuring was done using the Python programming language.

Over-all view

Trip legs were drawn as lines on a geographic map using the R programming language, using different opacity based on how many trips a leg was included in. The following additional steps were taken to make patterns appear more clearly in regions with a high concentration of trip legs:

1. An image of the lines (without national borders or other map features) was read pixel by pixel in Python.
2. New pixels were generated using the colour scale purple-yellow-white, based on the darkness of each pixel in the input file. These were saved as a new image file.
3. The new image file was displayed against a map with national border. (Figure 12.)

The same method, but without the additional steps for introducing a colour scale, was used to visualise itineraries reported by Eurail travellers (Figures 29-32).

Country-country combinations

For each country, the trips in which it was included were identified and counted (again using Python). Among these identified trips, the trips that included each of all other European countries were then counted. The percentage of the trips that include each of the other countries were then displayed in Table 1 in the report. One map for each country was made using the R programming language, using different shades of green to represent the same percentages. (The maps can be found below in the Annex.)

Network of city destinations

A case-term matrix file with the 250 most visited cities as columns and all trips as rows was put together in Python and used as in-data for a network analysis. The network analysis was done using an in-house software developed by Kairos Future and visualised using the Gephi network analysis software. (It would also have been possible to do the whole network analysis in Gephi.) Python was used to generate different colour codes for cities in different countries. (Figure 14.) The same network analysis was done based on countries (Figure 26) as well as based on itineraries reported by survey respondents (Figure 25), based on online search statistics (Figure 24), and based on itineraries reported by Eurail travellers (Figures 29-32).

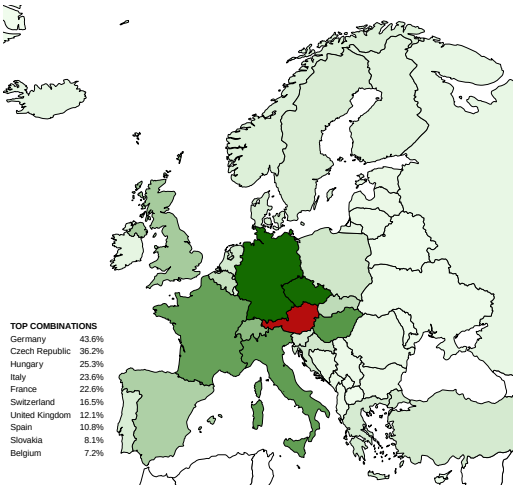
Clusters of trip itineraries

A case-term matrix file with the 515 most visited cities as columns and all trips as rows was put together in Python. The matrix was opened in the SPSS statistics software, which was used to conduct a factor analysis to see which cities typically appear in the same trips. A factor score was generated for each factor for each trip. Among the factors that the analysis resulted in, 13 which included cities in more than one country appeared as distinct clusters when drawn on a geographic map. Maps were generated using the R programming language. All legs of all trips were included when the maps were drawn, but the colour intensity was determined based on each trip's factor score. (Figures 16-20.) The same method was used to identify and visualise itinerary clusters in tour packages from prominent OTAs in China, India, Japan, and the U.S. (Figure 21.)

Country combinations

The 36 maps on the following pages show how often each of ETC's member countries plus France, Sweden, and the U.K. is combined with each of the other countries during multi-country trips – based on the trips identified through the analysis of online reviews (see Chapter 3). A darker colour on a map indicates that a country is more often combined with the country in focus, while a brighter colour shows the opposite.

Austria

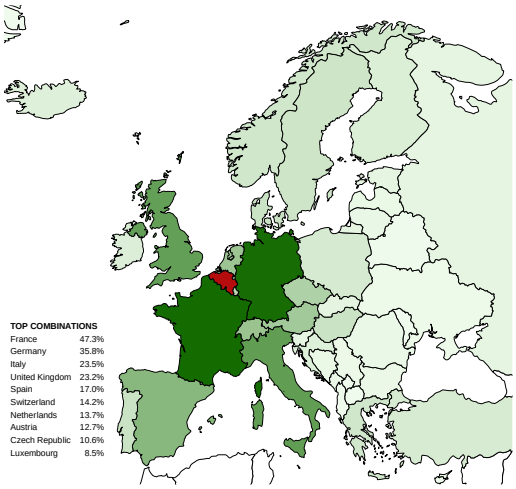


TOP COMBINATIONS

Germany	43.6%
Czech Republic	36.2%
Hungary	25.3%
Italy	23.6%
France	22.6%
Switzerland	16.5%
United Kingdom	12.1%
Spain	10.8%
Slovakia	8.1%
Belgium	7.2%

Percentages refer to the shares of multicountry trips including Austria that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Belgium

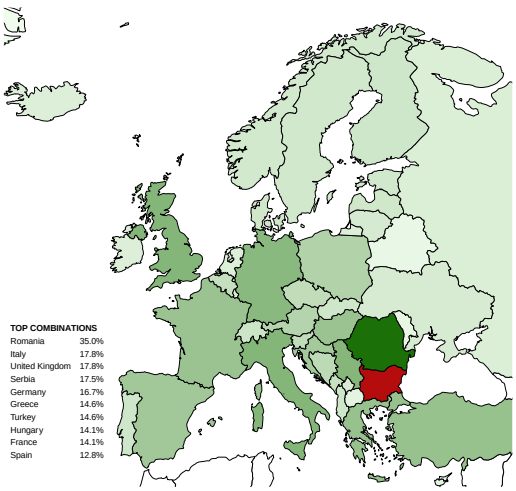


TOP COMBINATIONS

France	47.3%
Germany	35.8%
Italy	23.5%
United Kingdom	23.2%
Spain	17.0%
Switzerland	14.2%
Netherlands	13.7%
Austria	12.7%
Czech Republic	10.6%
Luxembourg	8.5%

Percentages refer to the shares of multicountry trips including Belgium that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Bulgaria

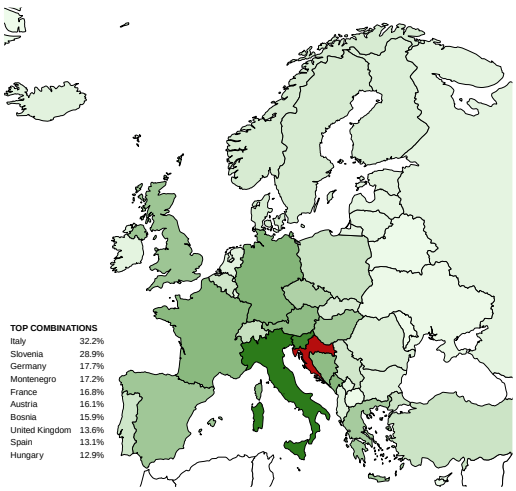


TOP COMBINATIONS

Romania	35.0%
Italy	17.8%
United Kingdom	17.8%
Serbia	17.5%
Germany	16.7%
Greece	14.6%
Turkey	14.6%
Hungary	14.1%
France	14.1%
Spain	12.8%

Percentages refer to the shares of multicountry trips including Bulgaria that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Croatia

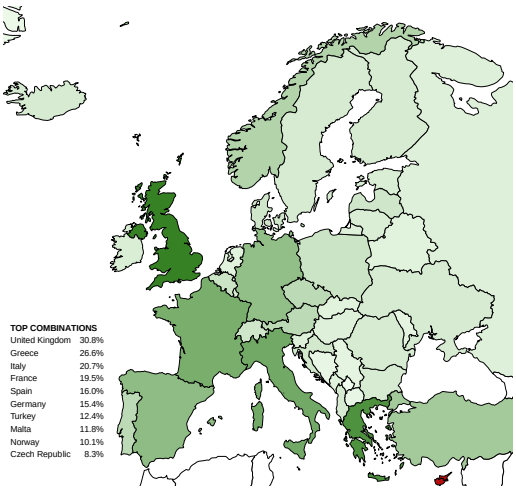


TOP COMBINATIONS

Italy	32.2%
Slovenia	28.9%
Germany	17.7%
Montenegro	17.2%
France	16.8%
Austria	16.1%
Bosnia	15.9%
United Kingdom	13.6%
Spain	13.1%
Hungary	12.9%

Percentages refer to the shares of multicountry trips including Croatia that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Cyprus

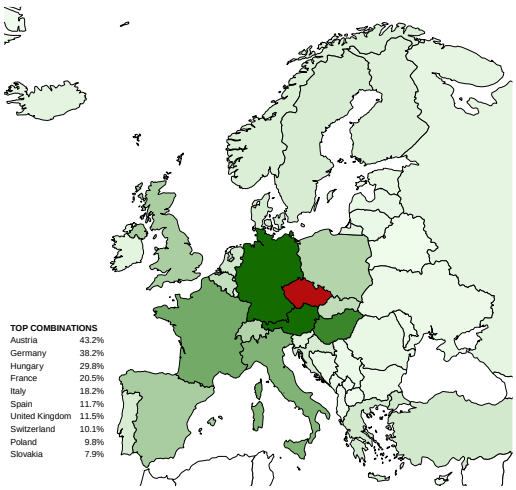


TOP COMBINATIONS

United Kingdom	30.8%
Greece	26.6%
Italy	20.7%
France	19.5%
Spain	16.0%
Germany	15.4%
Turkey	12.4%
Malta	11.8%
Norway	10.1%
Czech Republic	8.3%

Percentages refer to the shares of multicountry trips including Cyprus that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Czech Republic

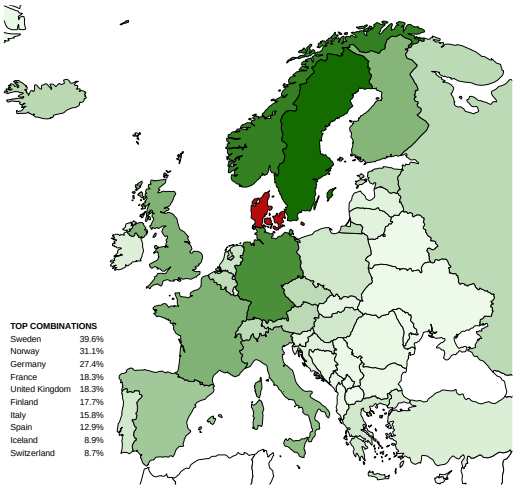


TOP COMBINATIONS

Austria	43.2%
Germany	38.2%
Hungary	29.8%
France	20.5%
Italy	18.2%
Spain	11.7%
United Kingdom	11.5%
Switzerland	10.1%
Poland	9.8%
Slovakia	7.9%

Percentages refer to the shares of multicountry trips including Czech Republic that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Denmark

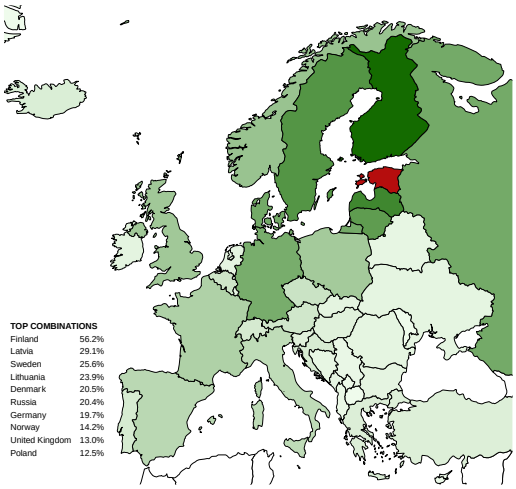


TOP COMBINATIONS

Sweden	39.6%
Norway	31.1%
Germany	27.4%
France	18.3%
United Kingdom	18.3%
Finland	17.7%
Italy	15.8%
Spain	12.9%
Iceland	8.9%
Switzerland	8.7%

Percentages refer to the shares of multicountry trips including Denmark that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Estonia

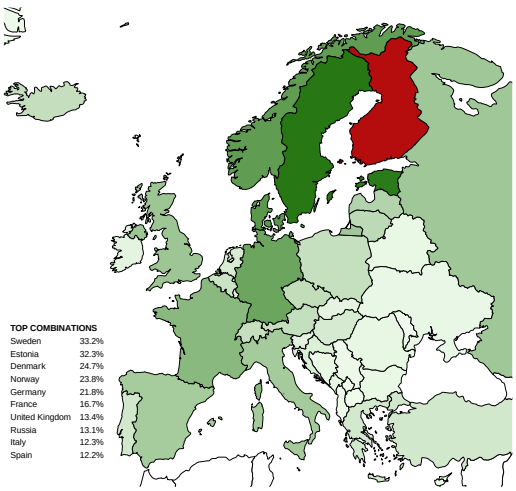


TOP COMBINATIONS

Finland	56.2%
Latvia	29.1%
Sweden	25.6%
Lithuania	23.9%
Denmark	20.5%
Russia	20.4%
Germany	19.7%
Norway	14.2%
United Kingdom	13.0%
Poland	12.5%

Percentages refer to the shares of multicountry trips including Estonia that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Finland

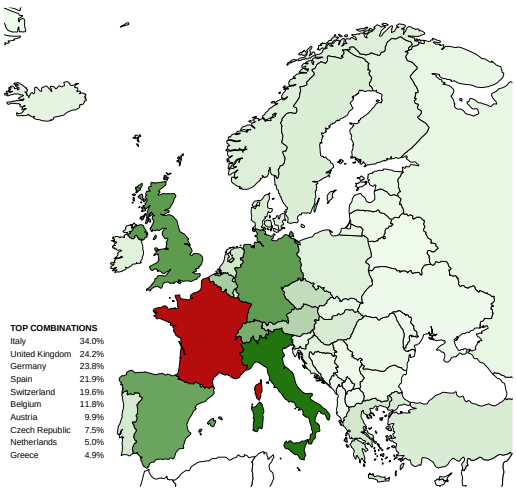


TOP COMBINATIONS

Sweden	33.2%
Estonia	32.3%
Denmark	24.7%
Norway	23.8%
Germany	21.8%
France	16.7%
United Kingdom	13.4%
Russia	13.1%
Italy	12.3%
Spain	12.2%

Percentages refer to the shares of multicountry trips including Finland that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

France

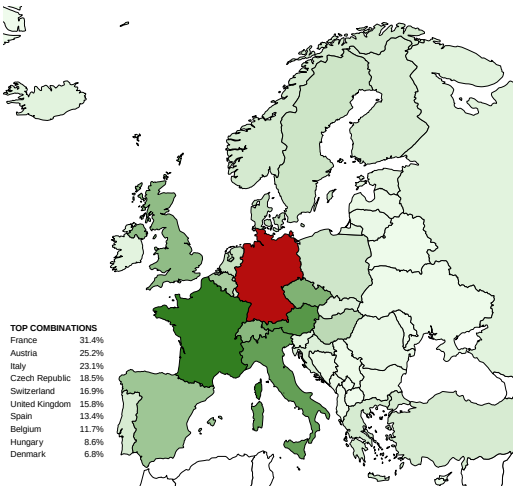


TOP COMBINATIONS

Italy	34.0%
United Kingdom	24.2%
Germany	23.8%
Spain	21.9%
Switzerland	19.6%
Belgium	11.8%
Austria	9.9%
Czech Republic	7.5%
Netherlands	5.0%
Greece	4.9%

Percentages refer to the shares of multicountry trips including France that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Germany

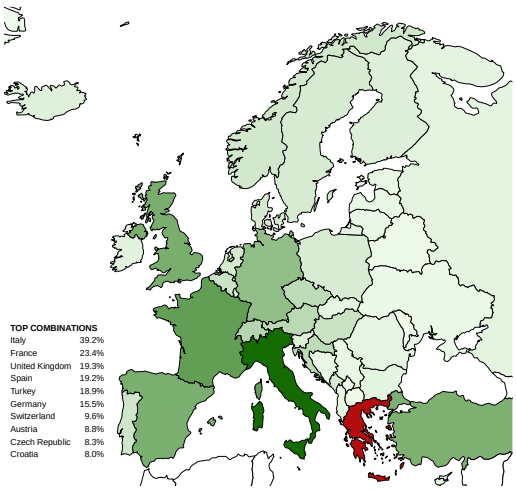


TOP COMBINATIONS

France	31.4%
Austria	25.2%
Italy	23.1%
Czech Republic	18.5%
Switzerland	16.9%
United Kingdom	15.8%
Spain	13.4%
Belgium	11.7%
Hungary	8.6%
Denmark	6.8%

Percentages refer to the shares of multicountry trips including Germany that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Greece

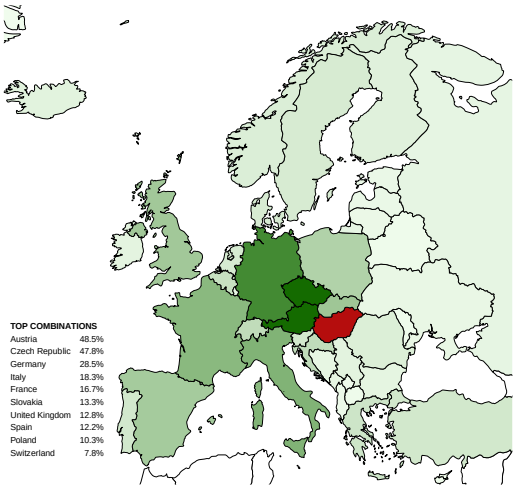


TOP COMBINATIONS

Italy	39.2%
France	23.4%
United Kingdom	19.3%
Spain	19.2%
Turkey	18.9%
Germany	15.5%
Switzerland	9.6%
Austria	8.8%
Czech Republic	8.3%
Croatia	8.0%

Percentages refer to the shares of multicountry trips including Greece that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Hungary

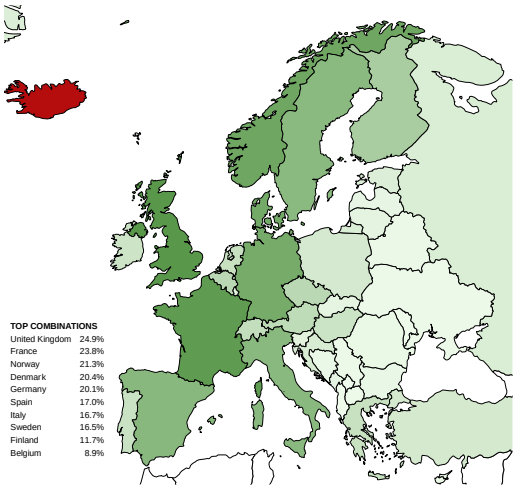


TOP COMBINATIONS

Austria	48.5%
Czech Republic	47.8%
Germany	28.5%
Italy	18.3%
France	16.7%
Slovakia	13.3%
United Kingdom	12.8%
Spain	12.2%
Poland	10.3%
Switzerland	7.8%

Percentages refer to the shares of multicountry trips including Hungary that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Iceland

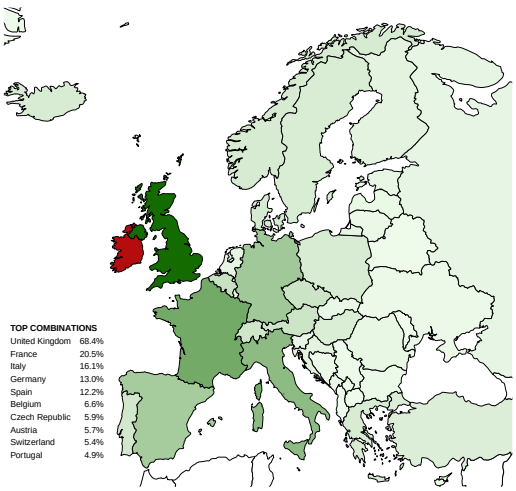


TOP COMBINATIONS

United Kingdom	24.9%
France	23.8%
Norway	21.3%
Denmark	20.4%
Germany	20.1%
Spain	17.0%
Italy	16.7%
Sweden	16.5%
Finland	11.7%
Belgium	8.9%

Percentages refer to the shares of multicountry trips including Iceland that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Ireland

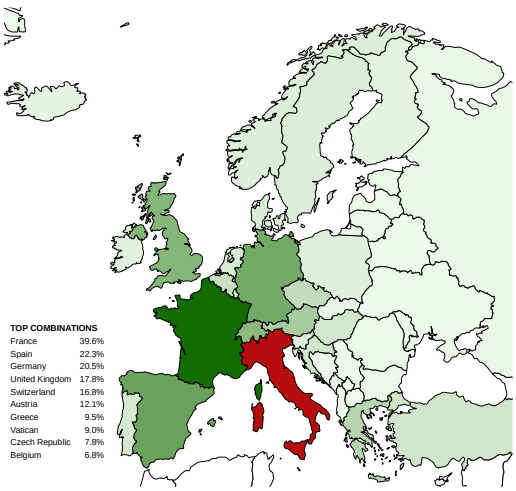


TOP COMBINATIONS

United Kingdom	68.4%
France	20.5%
Italy	16.1%
Germany	13.0%
Spain	12.2%
Belgium	6.6%
Czech Republic	5.9%
Austria	5.7%
Switzerland	5.4%
Portugal	4.9%

Percentages refer to the shares of multicountry trips including Ireland that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Italy

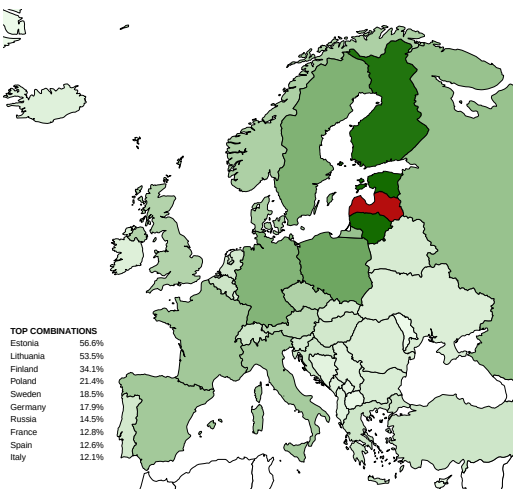


TOP COMBINATIONS

France	39.6%
Spain	22.3%
Germany	20.5%
United Kingdom	17.8%
Switzerland	16.8%
Austria	12.1%
Greece	9.5%
Vatican	9.0%
Czech Republic	7.8%
Belgium	6.8%

Percentages refer to the shares of multicountry trips including Italy that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Latvia

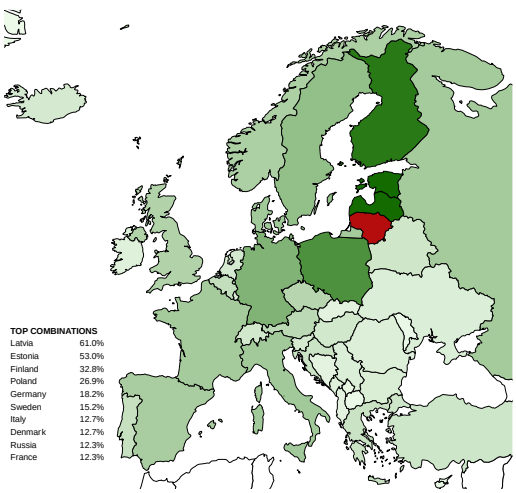


TOP COMBINATIONS

Estonia	56.6%
Lithuania	53.5%
Finland	34.1%
Poland	21.4%
Sweden	18.5%
Germany	17.9%
Russia	14.5%
France	12.8%
Spain	12.6%
Italy	12.1%

Percentages refer to the shares of multicountry trips including Latvia that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Lithuania

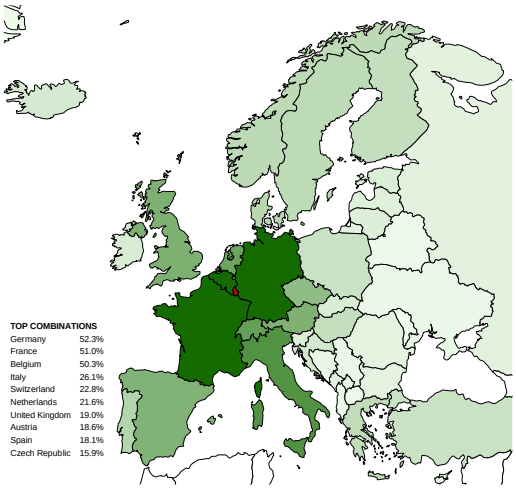


TOP COMBINATIONS

Latvia	61.0%
Estonia	53.0%
Finland	32.8%
Poland	26.9%
Germany	18.2%
Sweden	15.2%
Italy	12.7%
Denmark	12.7%
Russia	12.3%
France	12.3%

Percentages refer to the shares of multicountry trips including Lithuania that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Luxembourg

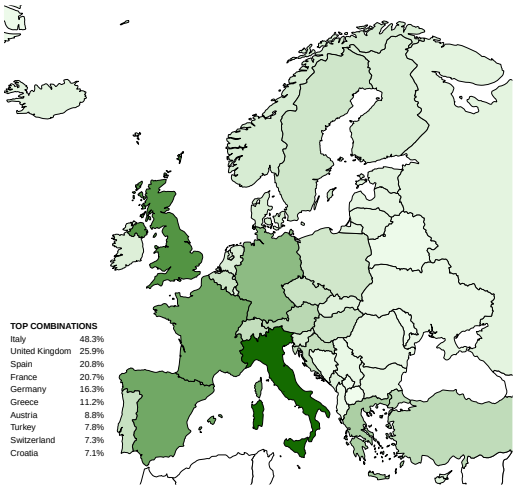


TOP COMBINATIONS

Germany	52.3%
France	51.0%
Belgium	50.3%
Italy	26.1%
Switzerland	22.8%
Netherlands	21.6%
United Kingdom	19.0%
Austria	18.6%
Spain	18.1%
Czech Republic	15.9%

Percentages refer to the shares of multicountry trips including Luxembourg that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Malta

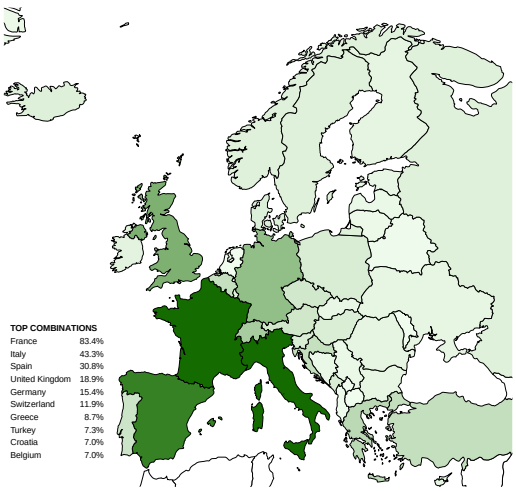


TOP COMBINATIONS

Italy	48.3%
United Kingdom	25.9%
Spain	20.8%
France	20.7%
Germany	16.3%
Greece	11.2%
Austria	8.8%
Turkey	7.8%
Switzerland	7.3%
Croatia	7.1%

Percentages refer to the shares of multicountry trips including Malta that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Monaco

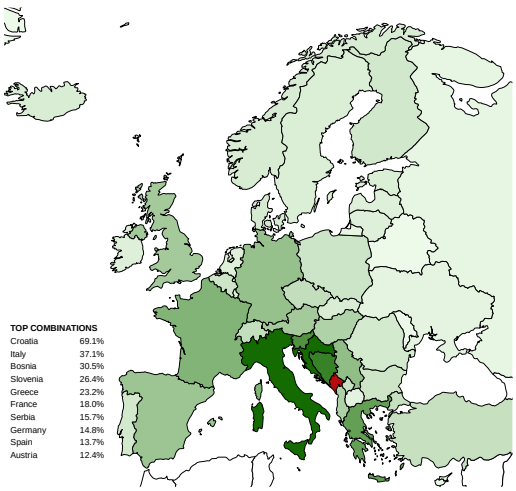


TOP COMBINATIONS

France	83.4%
Italy	43.3%
Spain	30.8%
United Kingdom	18.9%
Germany	15.4%
Switzerland	11.9%
Greece	8.7%
Turkey	7.3%
Croatia	7.0%
Belgium	7.0%

Percentages refer to the shares of multicountry trips including Monaco that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Montenegro

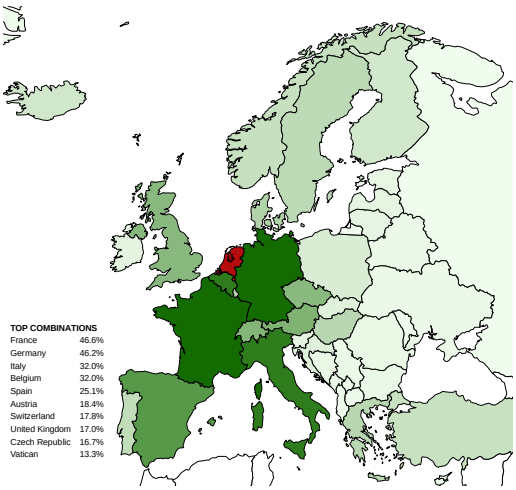


TOP COMBINATIONS

Croatia	69.1%
Italy	37.1%
Bosnia	30.5%
Slovenia	26.4%
Greece	23.2%
France	18.0%
Serbia	15.7%
Germany	14.8%
Spain	13.7%
Austria	12.4%

Percentages refer to the shares of multicountry trips including Montenegro that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Netherlands

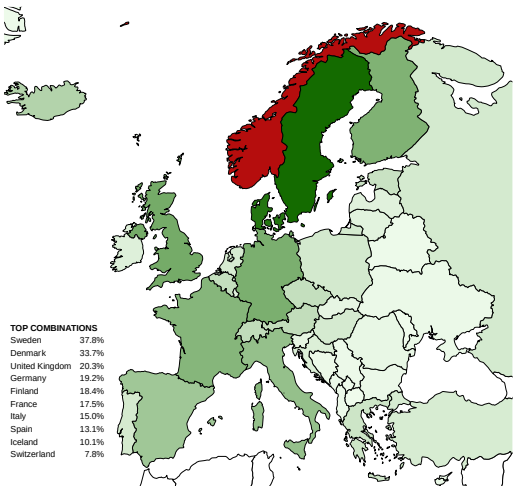


TOP COMBINATIONS

France	46.6%
Germany	46.2%
Italy	32.0%
Belgium	32.0%
Spain	25.1%
Austria	18.4%
Switzerland	17.8%
United Kingdom	17.0%
Czech Republic	16.7%
Vatican	13.3%

Percentages refer to the shares of multicountry trips including the Netherlands that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Norway

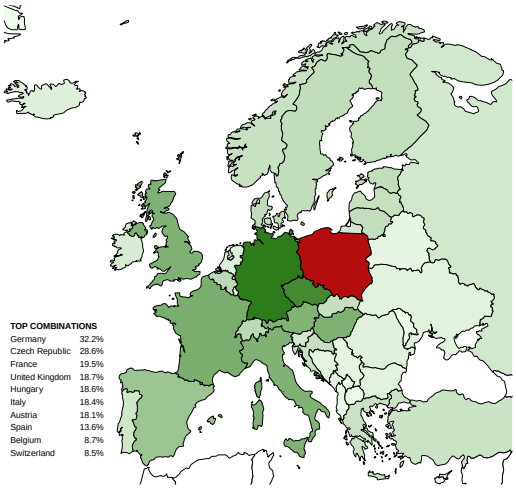


TOP COMBINATIONS

Sweden	37.8%
Denmark	33.7%
United Kingdom	20.3%
Germany	19.2%
Finland	18.4%
France	17.5%
Italy	15.0%
Spain	13.1%
Iceland	10.1%
Switzerland	7.8%

Percentages refer to the shares of multicountry trips including Norway that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Poland

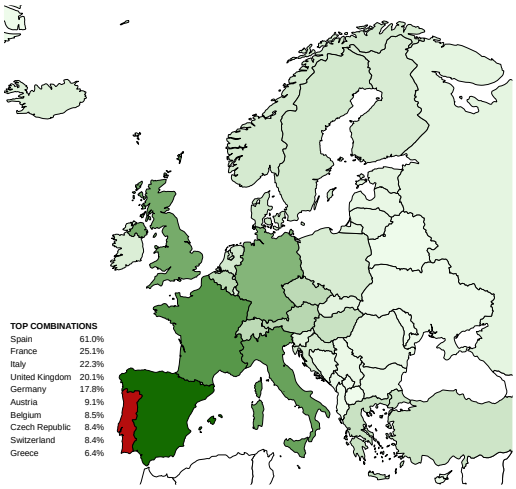


TOP COMBINATIONS

Germany	32.2%
Czech Republic	28.6%
France	19.5%
United Kingdom	18.7%
Hungary	18.6%
Italy	18.4%
Austria	18.1%
Spain	13.6%
Belgium	8.7%
Switzerland	8.5%

Percentages refer to the shares of multicountry trips including Poland that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Portugal

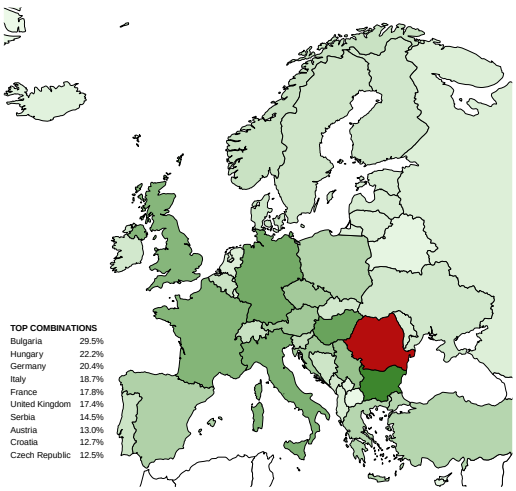


TOP COMBINATIONS

Spain	61.0%
France	25.1%
Italy	22.3%
United Kingdom	20.1%
Germany	17.8%
Austria	9.1%
Belgium	8.5%
Czech Republic	8.4%
Switzerland	8.4%
Greece	6.4%

Percentages refer to the shares of multicountry trips including Portugal that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Romania

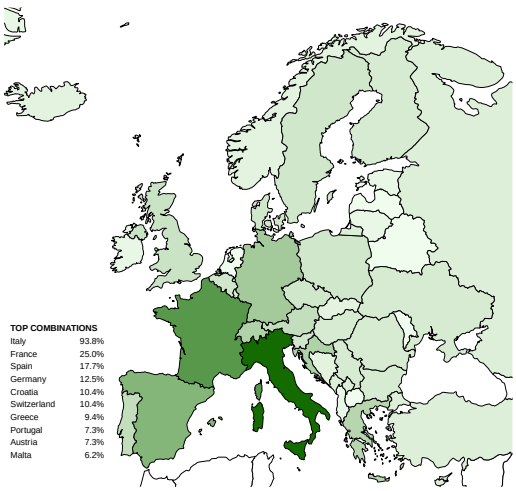


TOP COMBINATIONS

Bulgaria	29.5%
Hungary	22.2%
Germany	20.4%
Italy	18.7%
France	17.8%
United Kingdom	17.4%
Serbia	14.5%
Austria	13.0%
Croatia	12.7%
Czech Republic	12.5%

Percentages refer to the shares of multicountry trips including Romania that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

San Marino

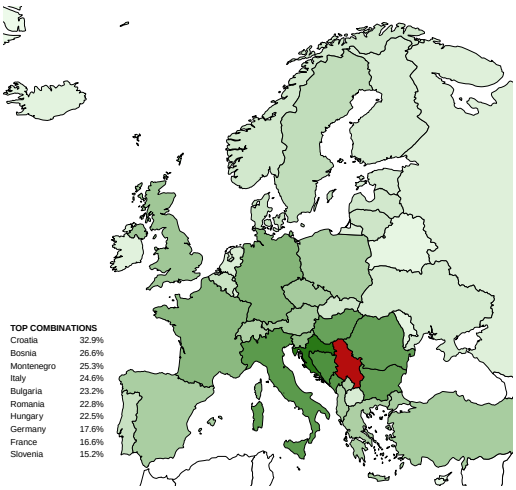


TOP COMBINATIONS

Italy	93.8%
France	25.0%
Spain	17.7%
Germany	12.5%
Croatia	10.4%
Switzerland	10.4%
Greece	9.4%
Portugal	7.3%
Austria	7.3%
Malta	6.2%

Percentages refer to the shares of multicountry trips including San Marino that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Serbia

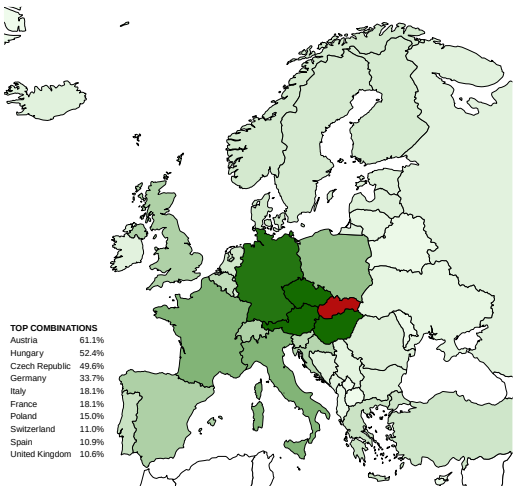


TOP COMBINATIONS

Croatia	32.9%
Bosnia	26.6%
Montenegro	25.3%
Italy	24.6%
Bulgaria	23.2%
Romania	22.8%
Hungary	22.5%
Germany	17.6%
France	16.6%
Slovenia	15.2%

Percentages refer to the shares of multicountry trips including Serbia that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Slovakia

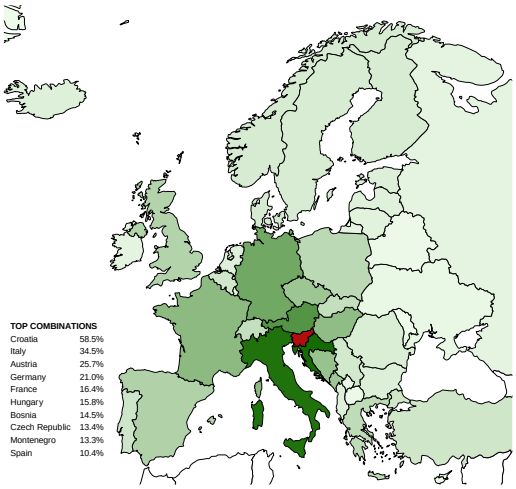


TOP COMBINATIONS

Austria	61.1%
Hungary	52.4%
Czech Republic	49.6%
Germany	33.7%
Italy	18.1%
France	18.1%
Poland	15.0%
Switzerland	11.0%
Spain	10.9%
United Kingdom	10.6%

Percentages refer to the shares of multicountry trips including Slovakia that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Slovenia

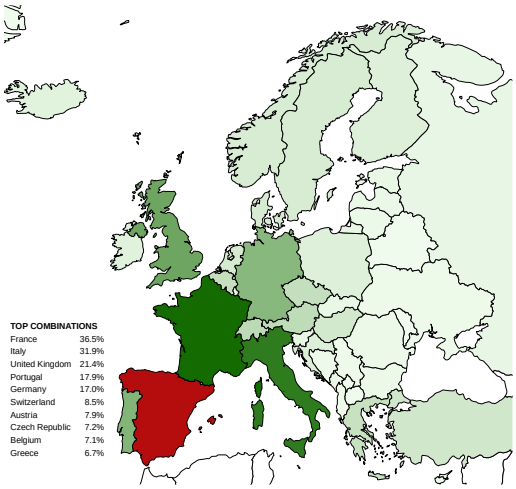


TOP COMBINATIONS

Croatia	58.5%
Italy	34.5%
Austria	25.7%
Germany	21.0%
France	16.4%
Hungary	15.8%
Bosnia	14.5%
Czech Republic	13.4%
Montenegro	13.3%
Spain	10.4%

Percentages refer to the shares of multicountry trips including Slovenia that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Spain

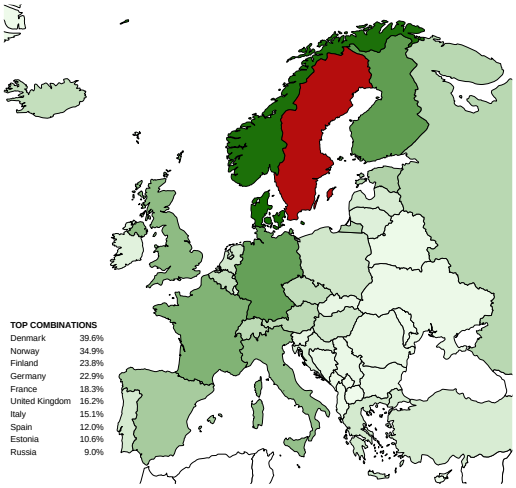


TOP COMBINATIONS

France	36.5%
Italy	31.9%
United Kingdom	21.4%
Portugal	17.9%
Germany	17.0%
Switzerland	8.5%
Austria	7.9%
Czech Republic	7.2%
Belgium	7.1%
Greece	6.7%

Percentages refer to the shares of multicountry trips including Spain that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Sweden

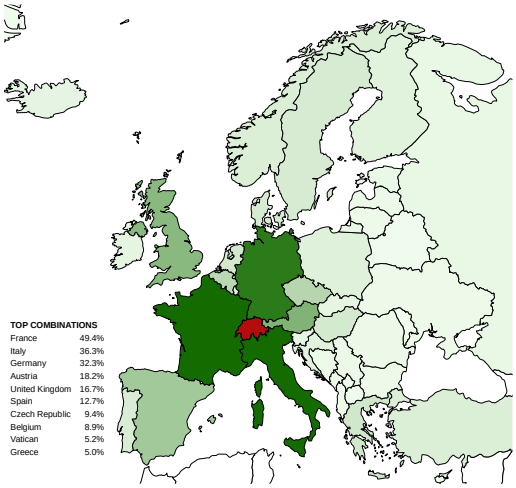


TOP COMBINATIONS

Denmark	39.6%
Norway	34.9%
Finland	23.8%
Germany	22.9%
France	18.3%
United Kingdom	16.2%
Italy	15.1%
Spain	12.0%
Estonia	10.6%
Russia	9.0%

Percentages refer to the shares of multicountry trips including Sweden that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Switzerland

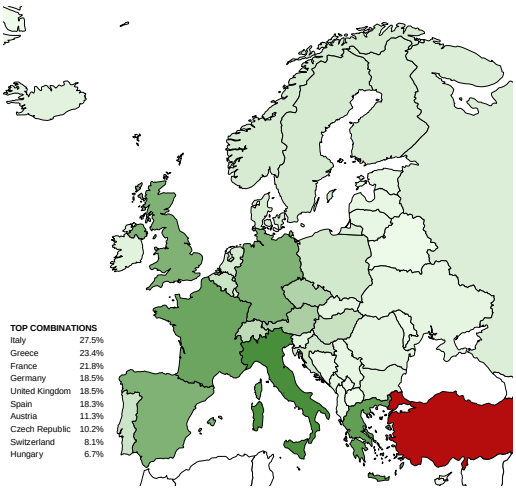


TOP COMBINATIONS

France	49.4%
Italy	36.3%
Germany	32.3%
Austria	18.2%
United Kingdom	16.7%
Spain	12.7%
Czech Republic	9.4%
Belgium	8.9%
Vatican	5.2%
Greece	5.0%

Percentages refer to the shares of multicountry trips including Switzerland that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

Turkey

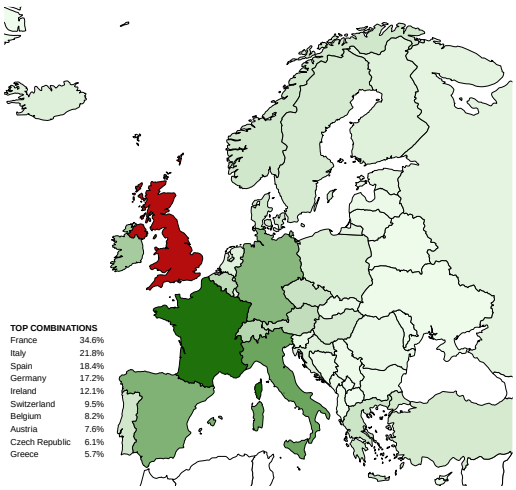


TOP COMBINATIONS

Italy	27.5%
Greece	23.4%
France	21.8%
Germany	18.5%
United Kingdom	18.5%
Spain	18.3%
Austria	11.3%
Czech Republic	10.2%
Switzerland	8.1%
Hungary	6.7%

Percentages refer to the shares of multicountry trips including Turkey that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

United Kingdom



TOP COMBINATIONS

France	34.6%
Italy	21.8%
Spain	18.4%
Germany	17.2%
Ireland	12.1%
Switzerland	9.5%
Belgium	8.2%
Austria	7.6%
Czech Republic	6.1%
Greece	5.7%

Percentages refer to the shares of multicountry trips including the U.K. that also include the listed countries. (Based on online reviews by travellers from China, India, Japan and the U.S.)

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