



PENN
SCHOEN
BERLAND

A New Golden Age of Travel

Opportunities to Boost the Economy and Promote Soft Diplomacy

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THE GOLDEN AGE OF TRAVEL AT-A-GLANCE

INTERNATIONAL TRIPS:

Doubled in the past decade, estimated to reach **1 billion in 2012** (UN World Travel Organization)



ECONOMIC IMPACT

Travel & Tourism contributions to the global GDP are forecast to **increase 4.2% per year** to **\$9.2 trillion** in 2021 (World Travel & Tourism Council)

JOBS

Travel & Tourism is predicted to create an additional **69 million net jobs** by 2021 (WTTC)



STUDY OVERVIEW

Between October 19 and November 17, 2011, international strategic research firm Penn Schoen Berland surveyed 1,100 global frequent travelers and opinion leaders on behalf of Marriott International.

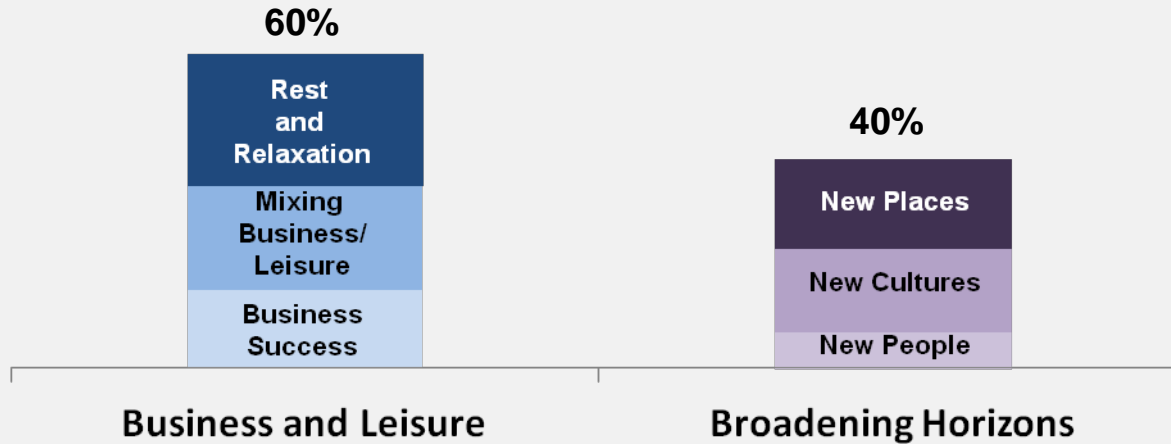
This report includes data on opinions about the importance of travel among that key group.



TRAVEL IS ABOUT MORE THAN BUSINESS AND LEISURE

Broadening horizons is also important to travelers

Which of the following benefits of travel do you believe is most important? *Showing All*

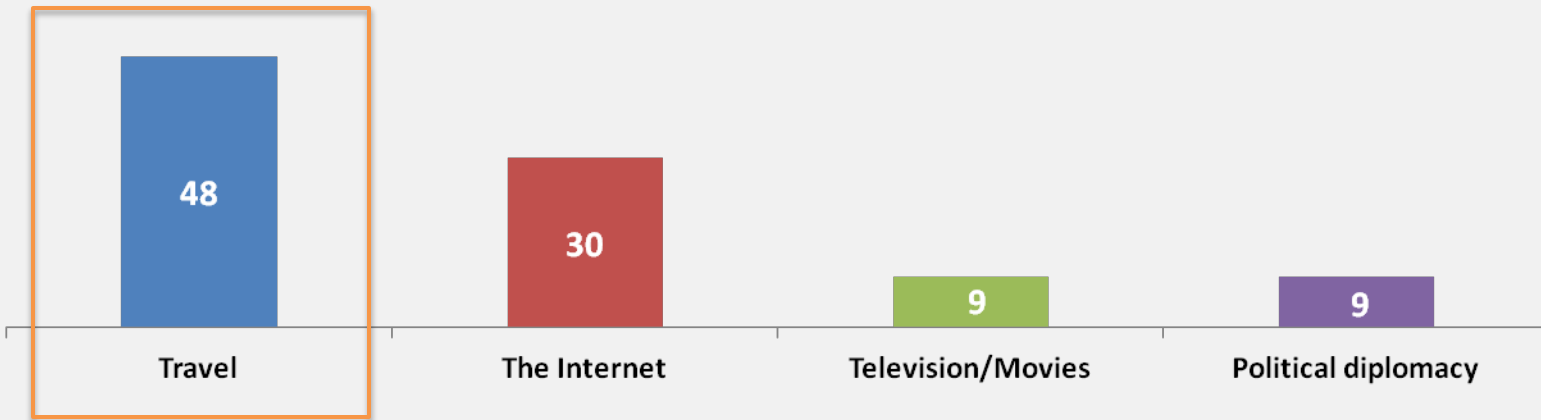







Which of the following benefits of travel do you believe is most important? <i>Ranked by All</i>	All	US	Euro	BR	CN	IN	Biz	Leis.	Influ.
Rest and relaxation	25	32	19	16	40	16	24	26	24
Mixing business and leisure	20	11	12	27	29	24	23	19	21
Seeing new places	17	20	21	15	14	13	13	16	15
Learning about new cultures	16	16	25	22	6	13	14	16	15
Achieving business success	15	15	12	14	11	23	17	14	16
Meeting new people	7	5	10	7	2	12	8	8	7
Other	0	1	0	0	0	1	0	0	0
None of the above	0	0	1	1	0	1	0	0	1

TRAVELERS STRONGLY BELIEVE TRAVEL CAN BREAK DOWN CULTURAL BARRIERS

Seen as more important than technology, media and diplomacy

Which of the following do you believe can be most effective at breaking down cultural barriers? *Showing All*



Which of the following do you believe can be most effective at breaking down cultural barriers? <i>Ranked by All</i>	All						Under 35	35-49	50+
Travel	48	55	51	56	41	38	48	49	48
The Internet	30	20	32	25	48	32	31	30	30
Television/Movies	9	6	9	9	7	16	12	8	7
Political diplomacy	9	10	8	10	5	14	8	10	10
Don't know	3	9	2	1	0	1	2	2	5

CULTURAL EXPERIENCES, NOT POLITICS ALONE, ARE SEEN AS MEANS TO SPREADING PEACE

Which of the following statements is closer to your view?






The more people experience other countries and cultures, the more peace will spread

It does not matter how much people experience other countries and cultures, achieving peace is up to political leaders, not citizens

All

77

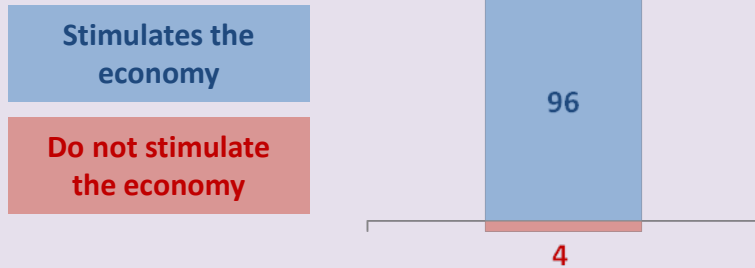
19

Which of the following statements is closer to your view?	All						Under 35	35-49	50+
The more people experience other countries and cultures, the more peace will spread	77	75	68	84	84	78	74	79	79
It does not matter how much people experience other countries and cultures, achieving peace is up to political leaders, not citizens	19	18	25	14	16	21	23	17	17
Don't know	4	7	8	2	1	1	4	4	5

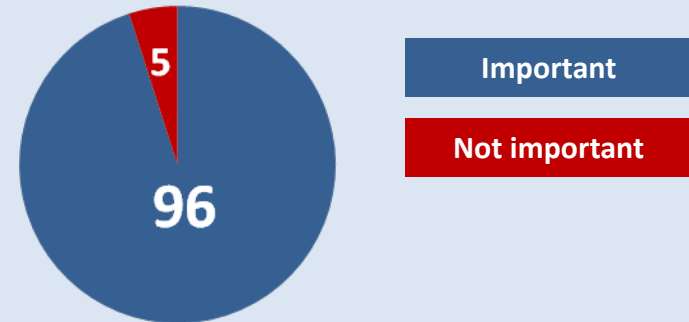
UNDERSTANDING OF ECONOMIC BENEFITS IS CLEAR

Views are remarkably strong and consistent globally

Travel seen as **economic stimulus**



Travel seen as **important to job creation**



Travel seen as a **main economic driver**

Encouraging travel and tourism is one of the most important ways to help the country's economy growth

There are plenty of more important ways than encouraging travel and tourism to help the country's economy growth

