

U.S. Department of Commerce  
International Trade Administration



National Travel and Tourism Office

# 2014 Market Profile: Overseas



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## Visitation Trends (Arrivals)

| [Thousands of Visitors] | 2007   | 2008   | 2009   | 2010   | 2011   | 2012   | 2013   | 2014   | Change<br>2014/2007 |
|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------|---------------------|
| Total Arrivals          | 23,892 | 25,341 | 23,756 | 26,363 | 27,883 | 29,761 | 32,038 | 34,419 | 10,527              |
| Percentage Change (%)   | 10     | 6      | -6     | 11     | 6      | 7      | 8      | 7      | 44                  |

## Spending Trends (Exports)

| [Millions of U.S. Dollars]                    | 2007      | 2008      | 2009      | 2010      | 2011      | 2012      | 2013      | 2014 <sup>p</sup> | Change<br>2014/2007 |
|---|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------------------|---------------------|
| Total Travel and Tourism Exports <sup>1</sup> | \$109,799 | \$127,400 | \$113,959 | \$130,076 | \$146,253 | \$156,830 | \$168,834 | -                 | -                   |
| Travel (all purposes including education)     | \$90,136  | \$102,343 | \$93,132  | \$105,988 | \$117,062 | \$125,265 | \$135,396 | -                 | -                   |
| Of which: Education Related                   | \$14,760  | \$16,653  | \$18,341  | -         | \$21,475  | \$23,479  | \$25,797  | -                 | -                   |
| Of which: Other Business/<br>Personal Travel  | \$72,261  | \$82,417  | \$71,778  | \$84,123  | \$93,153  | \$99,267  | \$106,894 | -                 | -                   |
| Passenger Air Transportation                  | \$19,663  | \$25,057  | \$20,827  | \$24,088  | \$29,191  | \$31,565  | \$33,438  | -                 | -                   |
| Change (%) in Total Exports                   | 15        | 16        | -11       | 14        | 12        | 7         | 8         | -                 | -                   |

<sup>(1)</sup> International standards now use a broader definition of travel than previously used, which includes education-related and health-related travel, as well as expenditures on goods and services by border, seasonal, and other short-term workers in the United States.

For more information, please visit: <http://travel.trade.gov/pdf/restructuring-travel.pdf>

<sup>(p)</sup> Preliminary estimates will be available in October 2015.

## Information Sources Used for Trip Planning

| Information Sources Used (multiple responses) | 2013<br>(Percent) | 2014<br>(Percent) | Point<br>Change <sup>(2)</sup> |
|---|-------------------|-------------------|--------------------------------|
| Airlines                                      | 43                | 44                | 0.4                            |
| Online Travel Agency                          | 31                | 32                | 1.7                            |
| Personal Recommendation                       | 24                | 25                | 1.2                            |
| Travel Agency Office                          | 24                | 23                | -1.2                           |
| Travel Guides                                 | 12                | 13                | 0.1                            |
| Corporate Travel Dept.                        | 13                | 12                | -0.7                           |
| National/State/City Travel Office             | 10                | 10                | 0.1                            |
| Tour Operator/Travel Club                     | 9                 | 8                 | -0.1                           |
| Other   | 5                 | 6                 | 0.4                            |

## Main Purpose of Trip

| Main Purpose of Trip             | 2013<br>(Percent) | 2014<br>(Percent) | Point<br>Change <sup>(2)</sup> |
|----------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday                 | 57                | 58                | 1.3                            |
| Visit Friends/Relatives          | 17                | 18                | 0.6                            |
| Business                         | 12                | 12                | -0.3                           |
| Convention/Conference/Trade Show | 7                 | 7                 | -0.6                           |
| Education                        | 5                 | 4                 | -0.2                           |
| Health Treatment                 | 0                 | 0                 | 0.0                            |
| Religion/Pilgrimages             | 0                 | 0                 | -0.1                           |
| Other                            | 2                 | 1                 | -0.7                           |

## All Purposes of Trip

| Purpose of Trip (multiple responses) | 2013<br>(Percent) | 2014<br>(Percent) | Point<br>Change <sup>(2)</sup> |
|--------------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday                     | 67                | 68                | 1.5                            |
| Visit Friends/Relatives              | 29                | 30                | 1.5                            |
| Business                             | 15                | 15                | -0.4                           |
| Convention/Conference/Trade Show     | 10                | 9                 | -0.7                           |
| Education                            | 7                 | 6                 | -0.3                           |
| Health Treatment                     | 1                 | 1                 | 0.2                            |
| Religion/Pilgrimages                 | 1                 | 1                 | 0.1                            |
| Other                                | 2                 | 1                 | -1.1                           |
|                                      |                   |                   |                                |
| <b>NET PURPOSES OF TRIP:</b>         |                   |                   |                                |
| Leisure & VFR                        | 79                | 81                | 2.2                            |
| Business & Convention                | 22                | 21                | -0.9                           |

## Activity Participation While in the United States

| Activity Participation While in the U.S.<br>(multiple responses) | 2013<br>(Percent) | 2014<br>(Percent) | Point<br>Change <sup>(2)</sup> |
|--|-------------------|-------------------|--------------------------------|
| Shopping   | 88                | 88                | 0.5                            |
| Sightseeing  | 77                | 77                | -0.2                           |
| Experience Fine Dining   | 39                | 38                | -0.6                           |
| National Parks/Monuments   | 34                | 34                | 0.6                            |
| Amusement/Theme Parks  | 28                | 29                | 1.4                            |
| Art Gallery/Museum   | 28                | 28                | -0.5                           |
| Small Towns/Countryside  | 27                | 28                | 1.1                            |
| Historical Locations   | 27                | 26                | -0.3                           |
| Guided Tours   | 24                | 23                | -0.7                           |
| Concert/Play/Musical   | 18                | 17                | -0.6                           |
| Nightclubbing/Dancing  | 16                | 15                | -0.3                           |
| Cultural / Ethnic Heritage Sites                                 | 16                | 15                | -0.5                           |
| Sporting Event   | 13                | 13                | 0.6                            |
| Water Sports   | 10                | 10                | 0.3                            |
| Casinos/Gamble   | 10                | 9                 | -0.4                           |
| Camping/Hiking   | 4                 | 5                 | 0.8                            |
| American Indian Communities                                      | 5                 | 5                 | 0.1                            |
| Environ./Eco. Excursions   | 3                 | 4                 | 0.5                            |
| Golfing/Tennis   | 4                 | 4                 | -0.3                           |
| Hunting/Fishing  | 2                 | 2                 | 0.3                            |
| Snow Sports  | 2                 | 2                 | -0.2                           |
| Other  | 2                 | 1                 | -0.3                           |



## Transportation Used in the United States

| Transportation Types Used in United States<br>(multiple responses) | 2013<br>(Percent) | 2014<br>(Percent) | Point<br>Change <sup>(2)</sup> |
|--|-------------------|-------------------|--------------------------------|
| Rented Auto  | 33                | 35                | 2.0                            |
| Taxicab/Limousine  | 35                | 33                | -1.7                           |
| Auto, Private or Company   | 31                | 32                | 0.8                            |
| City Subway/Tram/Bus   | 32                | 31                | -1.4                           |
| Air Travel between U.S. Cities                                     | 33                | 30                | -2.7                           |
| Bus between Cities   | 18                | 18                | -0.4                           |
| Ferry/River Taxi/Srt Scenic Cruise                                 | 10                | 10                | -0.6                           |
| Railroad between Cities  | 7                 | 7                 | -0.2                           |
| Cruise Ship/River Boat 1+ Nights                                   | 4                 | 5                 | 0.4                            |
| Rented Bicycle/Motorcycle/Moped                                    | 3                 | 3                 | 0.1                            |
| Motor Home/Camper  | 1                 | 1                 | 0.0                            |

## Select Traveler Characteristics

| Traveler Characteristics                 | 2013     | 2014     | Change <sup>(2)</sup> |
|--|----------|----------|-----------------------|
| Advance Trip Decision Time (mean days)   | 94       | 97       | 2.4                   |
| Advance Trip Decision Time (median days) | 60       | 60       | 0.0                   |
| Prepaid Package                          | 18       | 17       | -1.0                  |
| First International Trip to the U.S.     | 24       | 24       | 0.1                   |
| Length of Stay in U.S. (mean nights)     | 17.5     | 18.4     | 0.9                   |
| Length of Stay in U.S. (median nights)   | 9        | 9        | 0.0                   |
| Number of States Visited (% 1 state)     | 72       | 73       | 0.3                   |
| Average Number of States Visited         | 1.4      | 1.5      | 0.1                   |
| Hotel/Motel (% 1+ nights)                | 78       | 77       | -1.3                  |
| Average # of Nights in Hotel/Motel       | 9.7      | 9.7      | 0.0                   |
| Travel Party Size (mean # of persons)    | 1.6      | 1.7      | 0.1                   |
| Gender: % Male (among adults)            | 56       | 54       | -1.1                  |
| Household Income (mean average)          | \$94,820 | \$90,442 | -\$4,378              |
| Household Income (median average)        | \$67,826 | \$65,800 | -\$2,026              |
| Average Age: Female (among adults)       | 39       | 39       | 0.0                   |
| Average Age: Male (among adults)         | 41       | 41       | 0.3                   |

# 2014 Market Profile: Overseas

## U.S. Destinations Visited (States, Cities, and Regions)

| Visitation to U.S. Destinations/Regions <sup>(9)</sup> | Market Share 2013 (Percent) | Volume 2013 (000) | Market Share 2014 (Percent) | Volume 2014 (000) |
|--|-----------------------------|-------------------|-----------------------------|-------------------|
| <b>Regions</b>   |                             |                   |                             |                   |
| South Atlantic   | 30.7                        | 9,836             | 33.5                        | 11,530            |
| Middle Atlantic  | 33.9                        | 10,862            | 31.8                        | 10,945            |
| Pacific  | 21.5                        | 6,889             | 22.5                        | 7,744             |
| Pacific Islands  | 14.5                        | 4,646             | 12.8                        | 4,406             |
| Mountain   | 11.8                        | 3,781             | 11.8                        | 4,061             |
| East North Central                                     | 6.7                         | 2,147             | 6.2                         | 2,134             |
| West South Central                                     | 6.1                         | 1,954             | 5.7                         | 1,962             |
| New England  | 5.4                         | 1,730             | 5.5                         | 1,893             |
| West North Central                                     | 1.9                         | 609               | 1.9                         | 654               |
| East South Central                                     | 1.4                         | 449               | 1.5                         | 516               |
| <b>States</b>  |                             |                   |                             |                   |
| New York   | 30.6                        | 9,804             | 29.0                        | 9,982             |
| Florida  | 22.5                        | 7,209             | 24.7                        | 8,501             |
| California   | 20.2                        | 6,472             | 20.8                        | 7,159             |
| Hawaii   | 9.9                         | 3,172             | 8.9                         | 3,063             |
| Nevada   | 9.1                         | 2,916             | 8.9                         | 3,063             |
| Texas  | 4.9                         | 1,570             | 4.5                         | 1,549             |
| Massachusetts  | 4.3                         | 1,378             | 4.4                         | 1,514             |
| Illinois   | 4.5                         | 1,442             | 4.0                         | 1,377             |
| Guam   | 4.6                         | 1,474             | 3.9                         | 1,342             |
| New Jersey   | 2.9                         | 929               | 2.8                         | 964               |
| Pennsylvania   | 3.1                         | 993               | 2.8                         | 964               |
| Arizona  | 2.6                         | 833               | 2.7                         | 929               |
| Georgia  | 2.2                         | 705               | 2.5                         | 860               |
| Washington   | 1.6                         | 513               | 1.8                         | 620               |
| Utah   | 1.5                         | 481               | 1.6                         | 551               |
| Colorado   | 1.2                         | 384               | 1.3                         | 447               |
| North Carolina   | 1.2                         | 384               | 1.3                         | 447               |
| Virginia   | 1.1                         | 352               | 1.2                         | 413               |
| Louisiana  | 1.1                         | 352               | 1.1                         | 379               |
| Michigan   | **                          | **                | 1.0                         | 344               |
| Ohio   | 1.1                         | 352               | 1.0                         | 344               |
| Maryland   | 1.0                         | 320               | 0.9                         | 310               |
| Connecticut  | **                          | **                | 0.8                         | 275               |

# 2014 Market Profile: Overseas

## U.S. Destinations Visited (States, Cities, and Regions)

| Visitation to U.S. Destinations/Regions <sup>(3)</sup> | Market Share 2013 (Percent) | Volume 2013 (000) | Market Share 2014 (Percent) | Volume 2014 (000) |
|--|-----------------------------|-------------------|-----------------------------|-------------------|
| Cities   |                             |                   |                             |                   |
| New York City  | 29.9                        | 9,580             | 28.3                        | 9,741             |
| Miami  | 12.5                        | 4,005             | 14.1                        | 4,853             |
| Los Angeles  | 11.8                        | 3,781             | 12.8                        | 4,406             |
| Orlando  | 11.6                        | 3,717             | 12.0                        | 4,130             |
| San Francisco  | 9.5                         | 3,044             | 9.1                         | 3,132             |
| Las Vegas  | 8.9                         | 2,852             | 8.7                         | 2,994             |
| Honolulu Oahu  | 8.0                         | 2,563             | 7.2                         | 2,478             |
| Washington, D.C.                                       | 5.3                         | 1,698             | 5.6                         | 1,927             |
| Boston   | 4.0                         | 1,282             | 4.1                         | 1,411             |
| Chicago  | 4.3                         | 1,378             | 3.8                         | 1,308             |
| San Diego  | 2.6                         | 833               | 3.0                         | 1,033             |
| Houston  | 2.5                         | 801               | 2.5                         | 860               |
| Ft. Lauderdale   | **                          | **                | 2.3                         | 792               |
| Atlanta  | 1.8                         | 577               | 2.1                         | 723               |
| Flagstaff/Grand Canyon/Sedona                          | 1.7                         | 545               | 1.8                         | 620               |
| Philadelphia   | 2.1                         | 673               | 1.8                         | 620               |
| Anaheim-Santa Ana                                      | 1.5                         | 481               | 1.7                         | 585               |
| Seattle  | 1.5                         | 481               | 1.7                         | 585               |
| Tampa-St. Petersburg                                   | 1.4                         | 449               | 1.6                         | 551               |
| Florida Keys   | **                          | **                | 1.4                         | 482               |
| Dallas-Plano-Irving                                    | 1.4                         | 449               | 1.2                         | 413               |
| San Jose   | 1.3                         | 417               | 1.2                         | 413               |
| New Orleans  | **                          | **                | 1.0                         | 344               |

# 2014 Market Profile: Overseas

- (1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incident to a foreign visit) + passenger fare receipts (fares paid to U.S. air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).
- (2) Percentage-point and percentage changes are based on non-rounded data.
- (3) Only census region, state, and city destinations having a sample size of 400 or more are displayed.  
Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.
- (\*\*) Estimate not shown due to sample size fewer than 400 for this year.
- (p) Estimate is preliminary and subject to revision.

Note: Estimate not shown due to sample size fewer than 400 for this year. This profile shows only a portion of the 37 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee.  
To learn more, please visit our website: <http://travel.trade.gov/research/index.html>

For a list of the states that comprise each census region, please visit:

[http://travel.trade.gov/outreachpages/census\\_regions.html](http://travel.trade.gov/outreachpages/census_regions.html)

Interested in data for your destination? The NTTO sells custom reports. To learn more, go to:

<http://travel.trade.gov/research/programs/ifs/customized.html>

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office; Bureau of Economic Analysis

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# Survey of International Air Travelers

The Survey of International Air Travelers provides a level of detail and insight into the traveler characteristics and travel patterns of international visitors to and from the United States not found elsewhere. Responses are weighted with data from the Department of Homeland Security and the following thirty-seven tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the international traveler who visits the United States.

**Survey of International Air Travelers: Table Number and Description**

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# Interested in obtaining data for your organization?

One of the unique features of the Survey program is its 'data-mining' potential. The Survey research data, collected from the questionnaire, is maintained in a computer database. Therefore, customized reports, special tables and data files are available.

To learn more, go to: <http://travel.trade.gov/research/programs/ifs/index.html>

## For NTTO programs of interest visit:

<http://travel.trade.gov/research/index.html>

- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (APIS, formerly I-92)
- Survey of International Air Travelers (SIAT)
- Canadian Statistics
- Forecast of International Arrivals to the United States
- U.S. Travel and Tourism Exports, Imports and the Balance of Trade
- U.S. Travel and Tourism Satellite Accounts

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