



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

# Forecast for International Travel



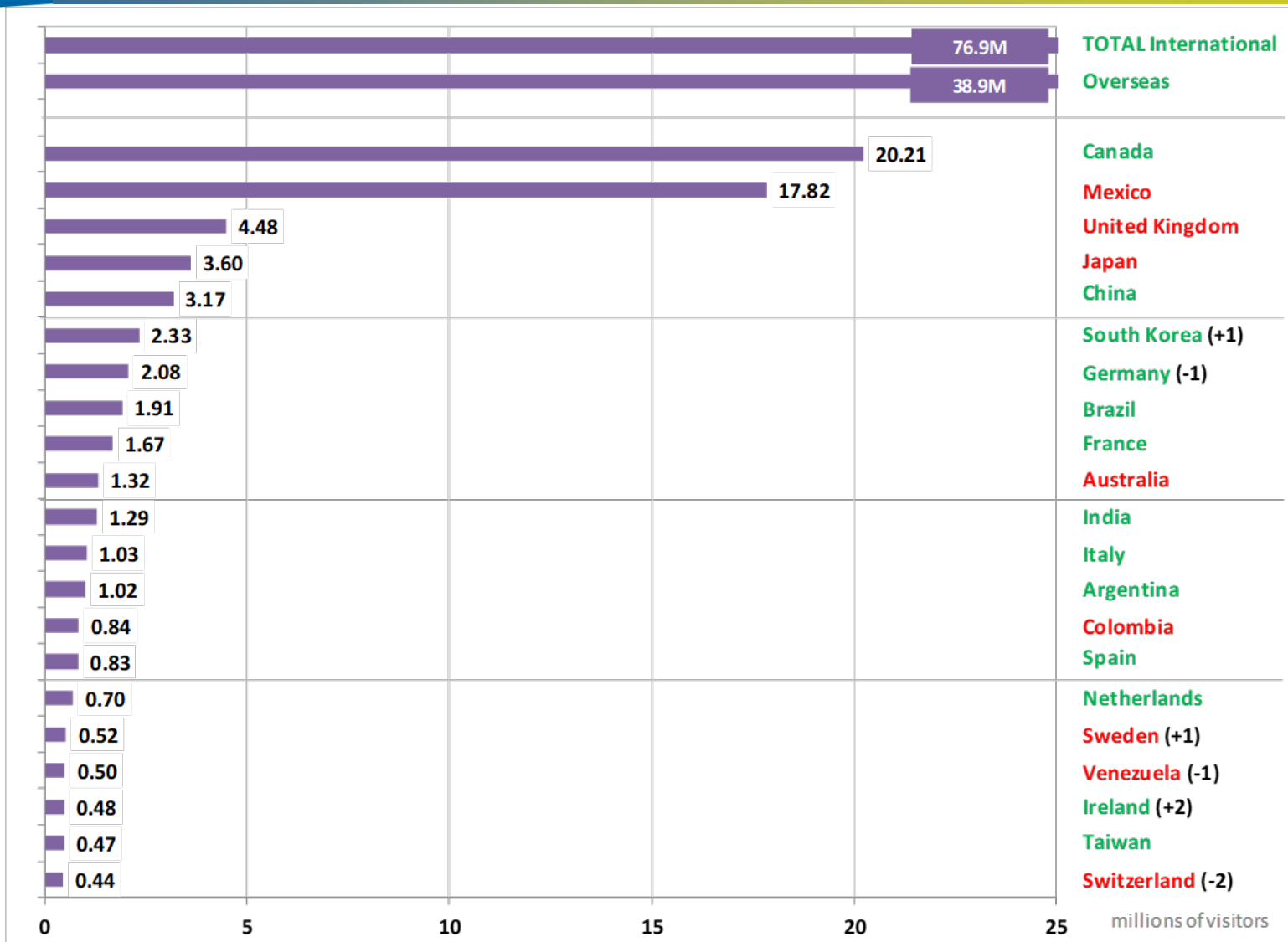
**Presented by:**

**julie heizer**

National Travel & Tourism Office  
International Trade Administration  
U.S. Department of Commerce



# Visitor Volume 2017 (millions)





# Visitor Volume Percent Change 2016 to 2017





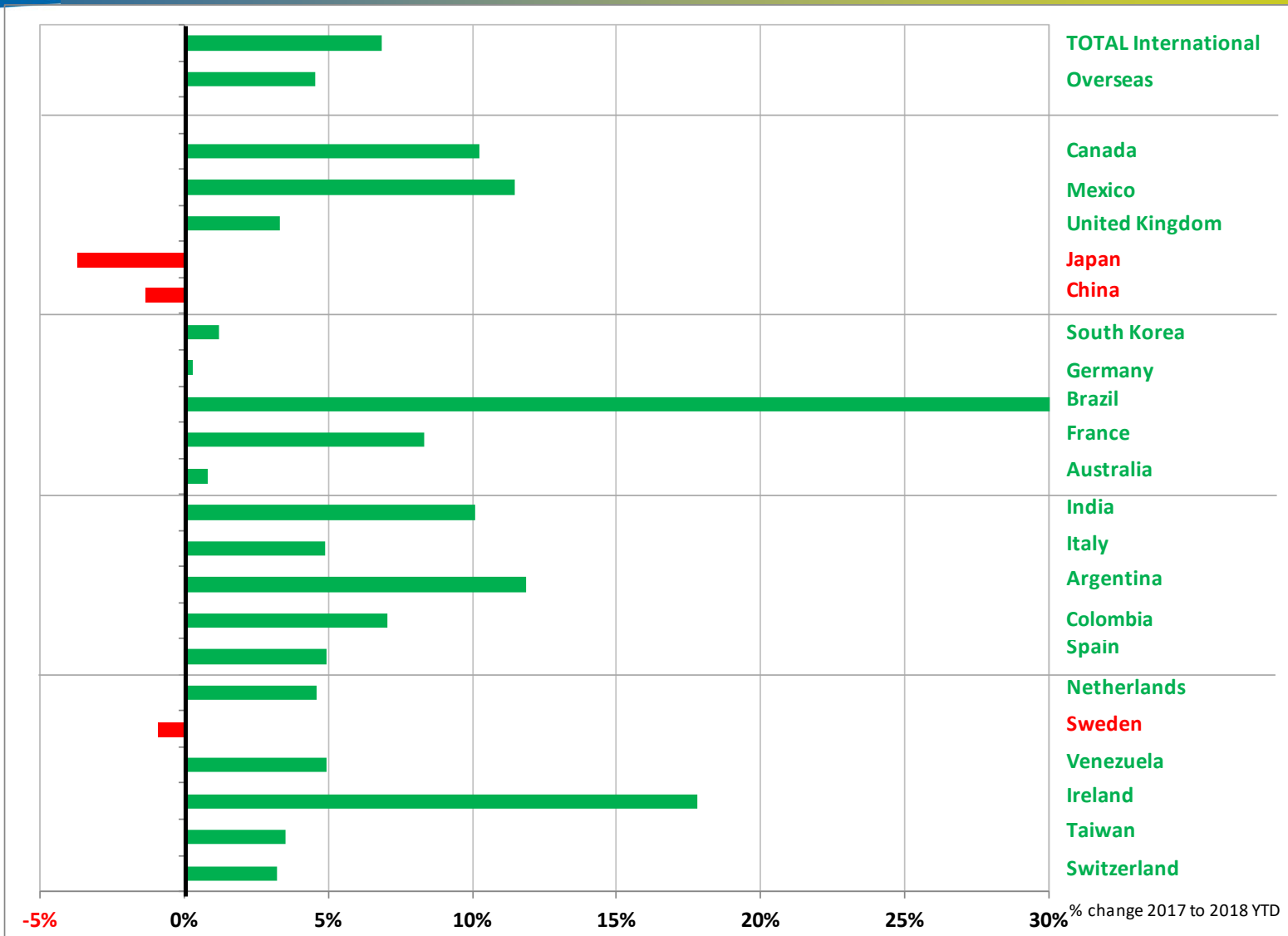
# Visitor Volume Change 2016 to 2017





# Visitor Percent Change 2018 YTD vs. 2017 YTD

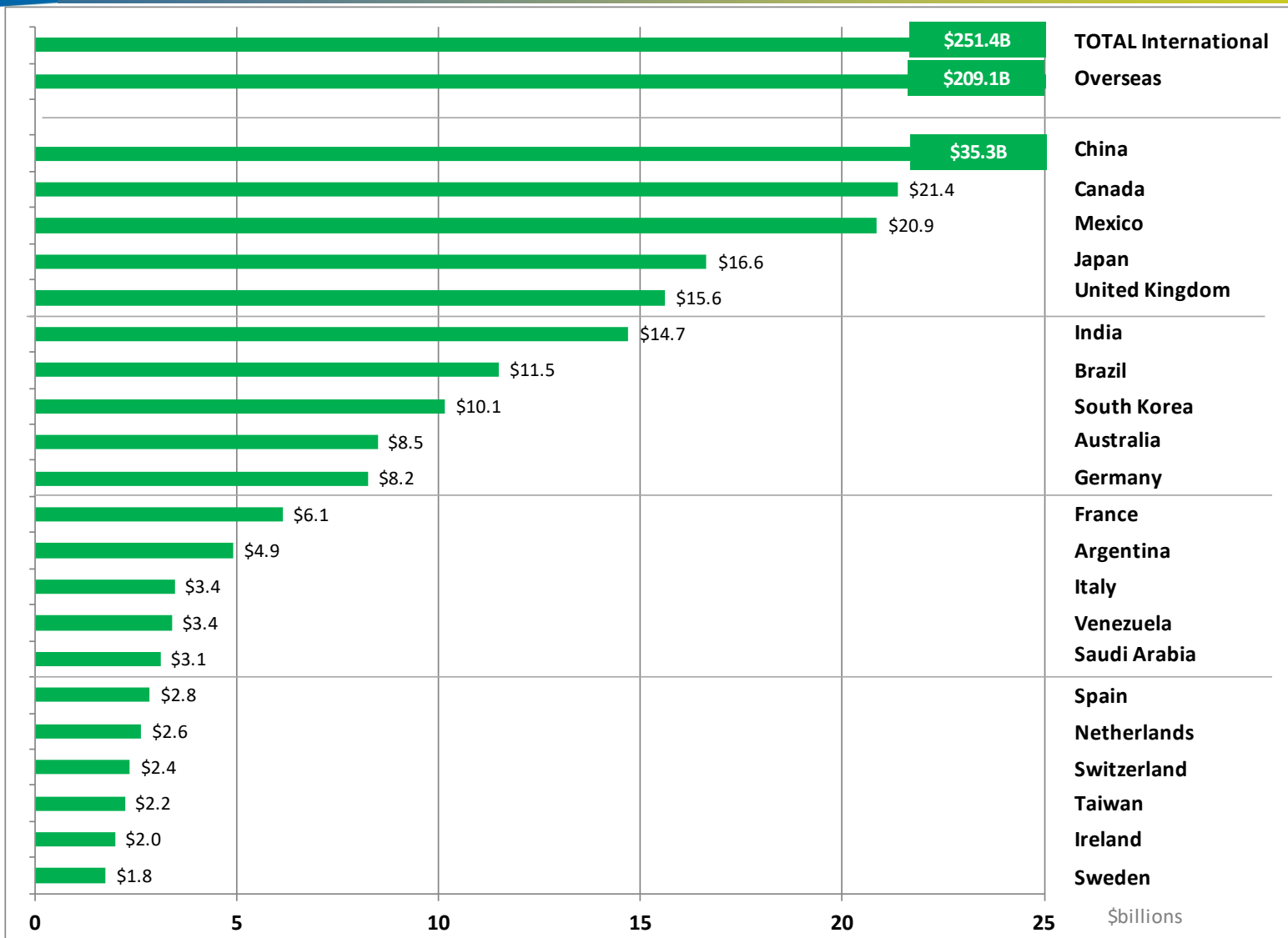
January-May





# Visitor Spending 2017

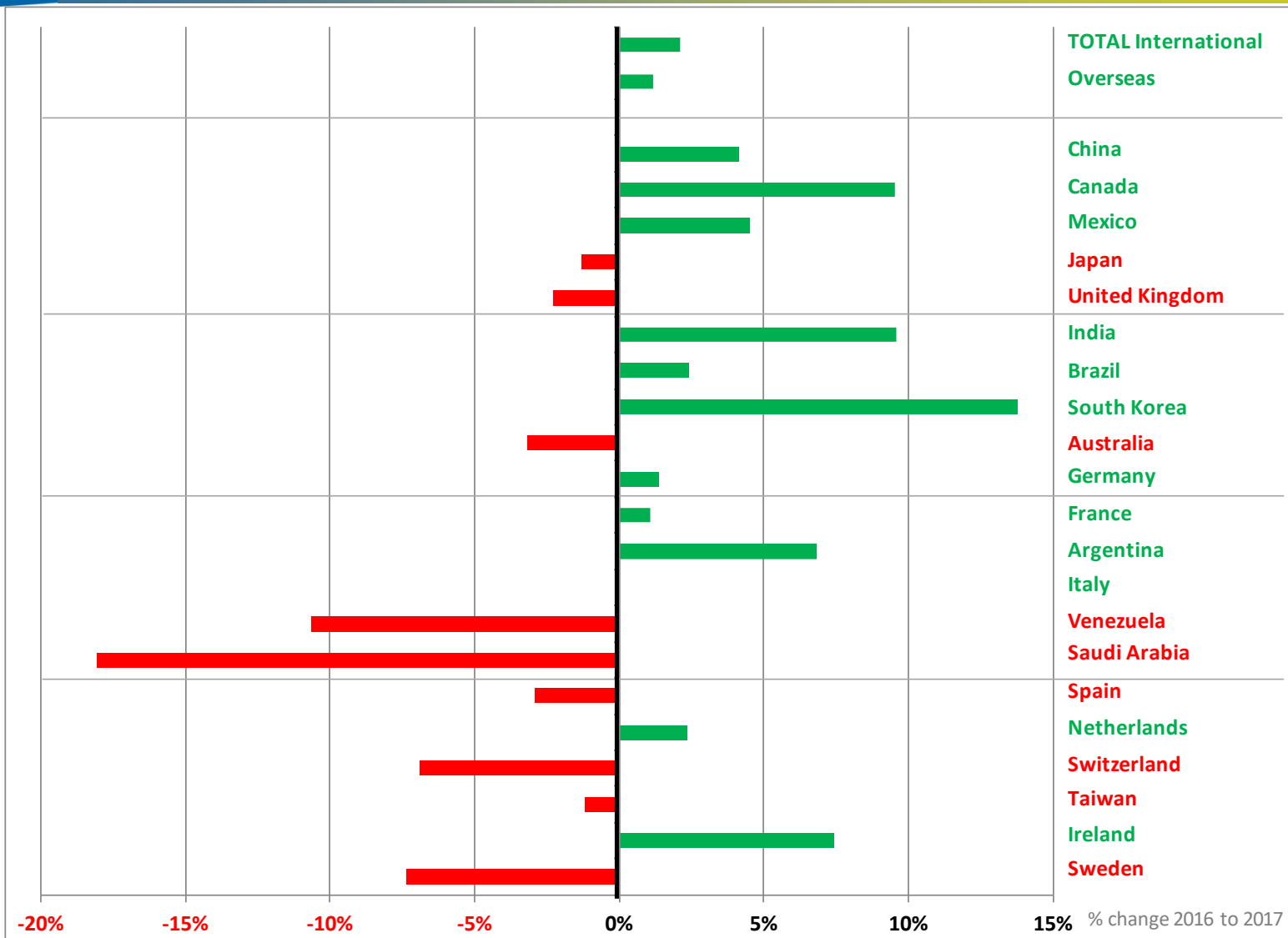
(\$billions)





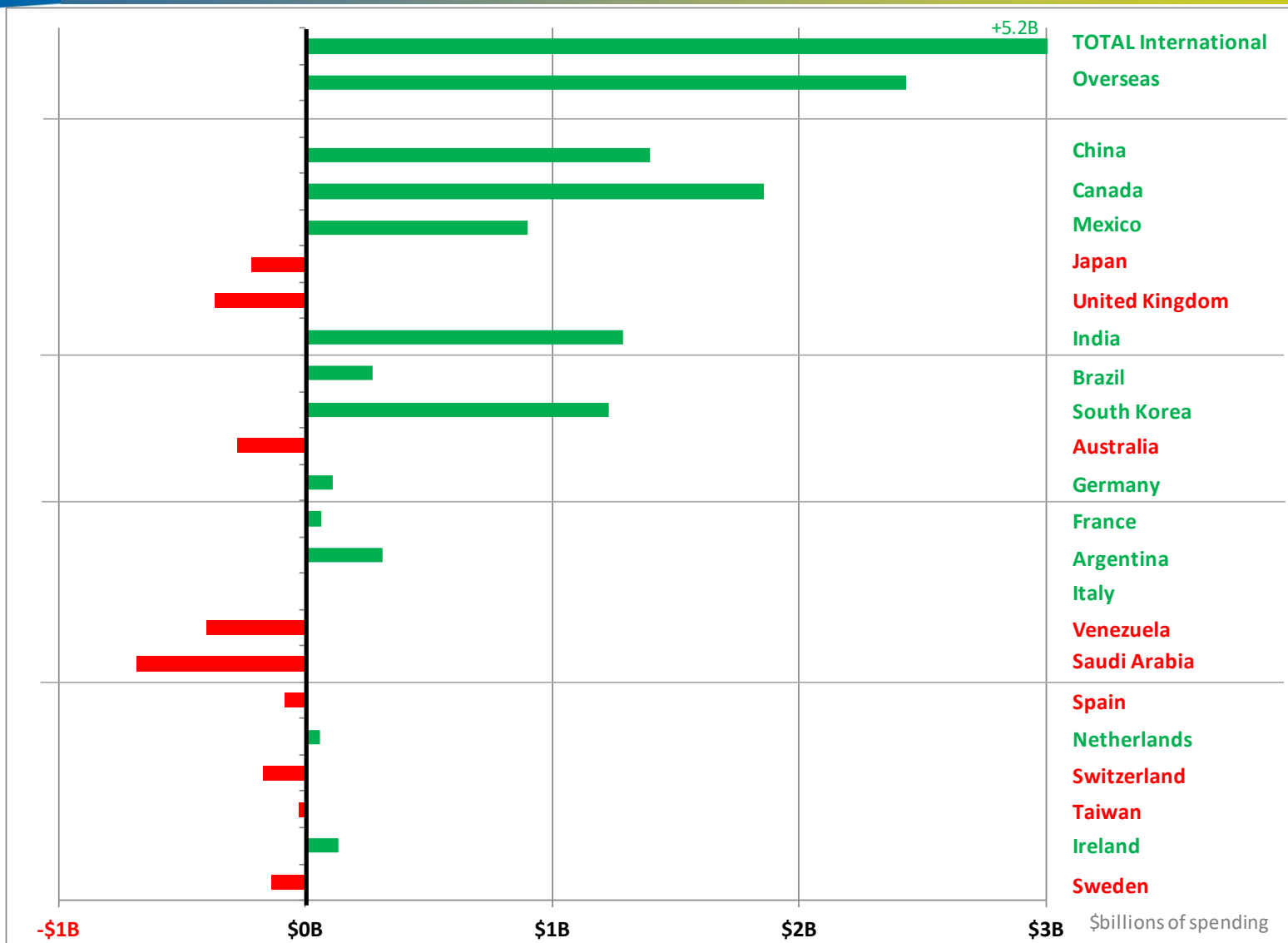
# Visitor Spending Percent Change 2016 to 2017

(%)





# Visitor Spending Change 2016 to 2017

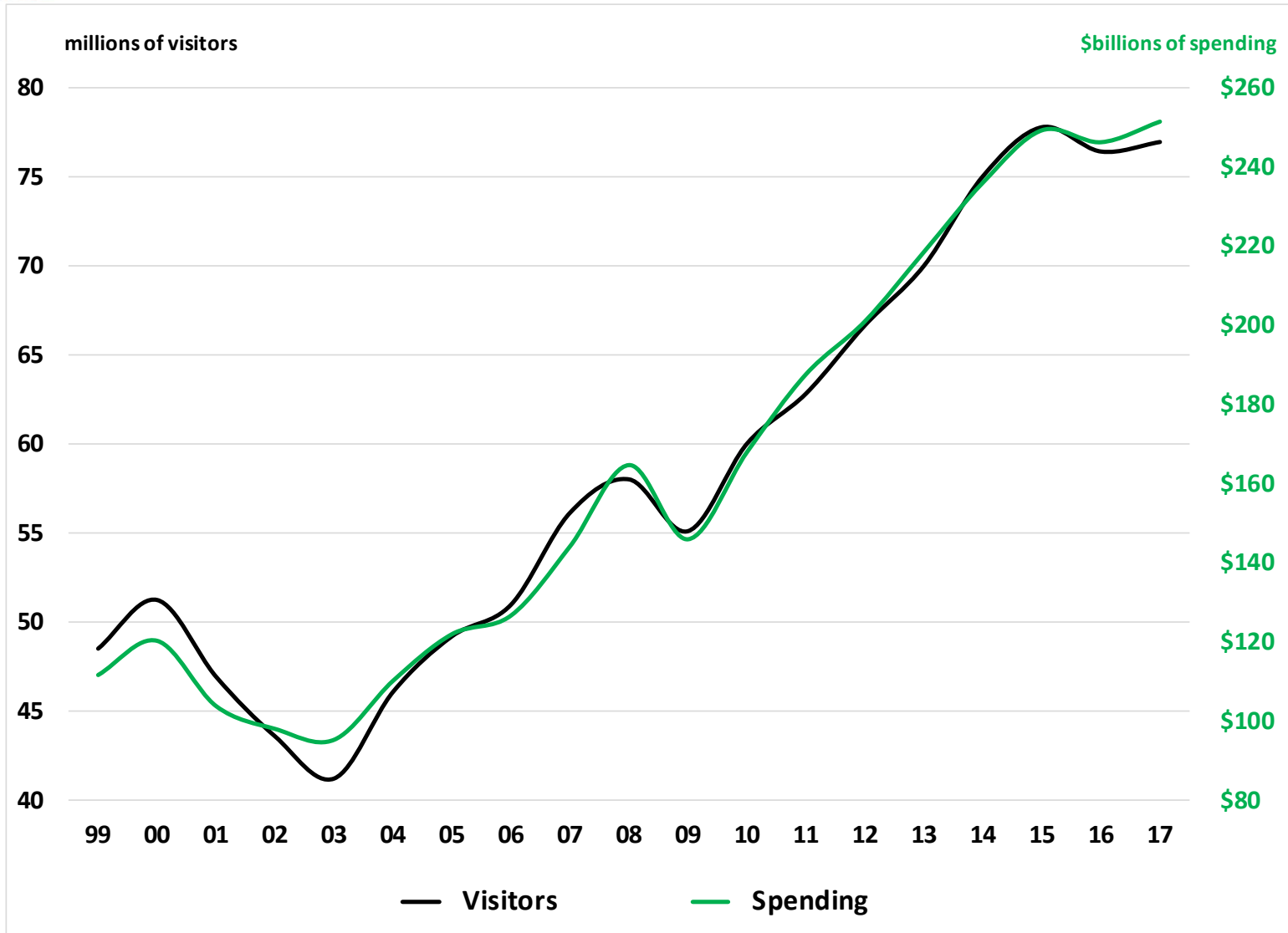






# U.S. Visitor and Spending Trends

(millions / \$billions)





# U.S. Visitor and Spending Top Tens

(millions / \$billions)

	2017		Record		2017		Record
	Arrivals	17/16	Year		Spending	17/16	Year
	(millions)				(billions)		
<b>Canada</b>	20.21	4.8%	2013	<b>China</b>	\$35.30	14.2%	2017
<b>Mexico</b>	17.82	-6.1%	2016	<b>Mexico</b>	\$20.86	8.4%	2017
<b>United Kingdom</b>	4.48	-2.3%	2015	<b>Canada</b>	\$21.37	8.6%	2013
<b>Japan</b>	3.60	-0.2%	1997	<b>Japan</b>	\$16.64	6.7%	2000
<b>China</b>	3.17	4.1%	2017	<b>United Kingdom</b>	\$15.60	6.3%	2015
<b>South Korea</b>	2.33	17.8%	2017	<b>India</b>	\$14.70	5.9%	2017
<b>Germany</b>	2.08	1.7%	2015	<b>Brazil</b>	\$11.48	4.6%	2014
<b>Brazil</b>	1.91	10.8%	2014	<b>South Korea</b>	\$10.15	4.1%	2017
<b>France</b>	1.67	1.6%	2015	<b>Australia</b>	\$8.48	3.4%	2015
<b>Australia</b>	1.32	-2.0%	2015	<b>Germany</b>	\$8.25	3.3%	2015



# Top Ten Country Rankings of Global

## Visitors and Receipts (excludes passenger fare exports) (millions / \$billions)

Rank	Destination Country	2017 Receipts (\$bil)	World Share (%)	Rank	Destination Country	2017 Visitors (mil)	World Share (%)
	<b>All Countries</b>	<b>\$1,340</b>			<b>All Countries</b>	<b>1,329</b>	
1	United States	\$211	15.7%	1	France	86.9	6.5%
2	Spain	\$68	5.1%	2	Spain	81.9	6.2%
3	France	\$61	4.5%	3	United States	76.9	5.8%
4	Thailand	\$58	4.3%	4	China	60.7	4.6%
5	United Kingdom	\$49	3.7%	5	Italy	58.3	4.4%
6	Italy	\$44	3.3%	6	Mexico	39.3	3.0%
7	Australia	\$42	3.1%	7	United Kingdom	37.7	2.8%
8	Germany	\$40	3.0%	8	Turkey	37.6	2.8%
9	Macau (SAR)	\$36	2.7%	9	Germany	37.5	2.8%
10	Japan	\$34	2.5%	10	Thailand	35.4	2.7%



# The NTTO Travel Forecast Update

2018 Fall Forecast (October 2018)

Forecast of International Travelers to the United States by Top Origin Countries																		
Estimates in thousands																		
Rank	Visitor		%		%		%		%		%		%		%		%	
Order	Origin	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	76,941	0.7%	81,317	5.7%	83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%	18,574	24%	3.7%
1	Canada	20,212	5%	21,021	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
2	Mexico	17,824	-6%	19,428	9%	20,010	3%	20,611	3%	21,229	3%	22,078	4%	22,961	4%	5,138	29%	4.3%
	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
3	United Kingdom	4,483	-2%	4,662	4%	4,755	2%	4,945	4%	5,143	4%	5,298	3%	5,404	2%	921	21%	3.2%
4	Japan	3,596	-0%	3,488	-3%	3,523	1%	3,558	1%	3,593	1%	3,629	1%	3,702	2%	106	3%	0.5%
5	China	3,174	4%	3,237	2%	3,302	2%	3,401	3%	3,571	5%	3,821	7%	4,127	8%	953	30%	4.5%
6	South Korea	2,335	18%	2,335	0%	2,452	5%	2,550	4%	2,626	3%	2,705	3%	2,786	3%	451	19%	3.0%
7	Germany	2,080	2%	2,143	3%	2,186	2%	2,208	1%	2,230	1%	2,252	1%	2,297	2%	217	10%	1.7%
8	Brazil	1,912	11%	2,065	8%	2,107	2%	2,149	2%	2,213	3%	2,324	5%	2,463	6%	551	29%	4.3%
9	France	1,668	2%	1,801	8%	1,873	4%	1,929	3%	1,987	3%	2,027	2%	2,067	2%	400	24%	3.6%
10	Australia	1,324	-2%	1,363	3%	1,391	2%	1,405	1%	1,447	3%	1,519	5%	1,610	6%	287	22%	3.3%
11	India	1,285	7%	1,414	10%	1,485	5%	1,574	6%	1,668	6%	1,768	6%	1,874	6%	589	46%	6.5%
12	Italy	1,032	4%	1,063	3%	1,116	5%	1,139	2%	1,173	3%	1,196	2%	1,220	2%	188	18%	2.8%
13	Argentina	1,018	10%	1,059	4%	1,091	3%	1,112	2%	1,146	3%	1,192	4%	1,251	5%	233	23%	3.5%
14	Colombia	842	-1%	926	10%	982	6%	1,031	5%	1,072	4%	1,104	3%	1,137	3%	295	35%	5.1%
15	Spain	827	2%	852	3%	886	4%	903	2%	921	2%	931	1%	940	1%	113	14%	2.2%
16	Netherlands	701	4%	729	4%	751	3%	766	2%	781	2%	797	2%	821	3%	120	17%	2.7%
17	Sweden	522	-7%	517	-1%	522	1%	533	2%	549	3%	560	2%	571	2%	49	9%	1.5%
18	Venezuela	500	-15%	500	0%	490	-2%	485	-1%	485	0%	485	0%	480	-1%	-20	-4%	-0.7%
19	Ireland	484	9%	551	14%	590	7%	619	5%	644	4%	664	3%	683	3%	200	41%	5.9%
20	Taiwan	475	2%	489	3%	499	2%	509	2%	524	3%	540	3%	556	3%	81	17%	2.7%
21	Switzerland	441	-6%	455	3%	464	2%	478	3%	492	3%	507	3%	522	3%	81	18%	2.8%



# The NTTO Travel Forecast Update

2018 Fall Forecast (October 2018)

## Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor	Actual	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Change	Change	CAGR
Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>83,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
1	Canada	20,212	5%	21,021	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
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	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
3	United Kingdom	4,483	-2%	4,662	4%	4,755	2%	4,945	4%	5,143	4%	5,298	3%	5,404	2%	921	21%	3.2%
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# The NTTO Travel

2018 Fall Forecast (October)

## Forecast of International Travel

Estimates in thousands

Rank	Visitor
Order	Origin
2017	Country
<b>Grand Total</b>	
1	Canada
2	Mexico
<b>Overseas</b>	
3	United Kingdom
4	Japan
5	China
6	South Korea
7	Germany
8	Brazil
9	France
10	Australia
11	India
12	Italy
13	Argentina
14	Colombia
15	Spain
16	Netherlands
17	Sweden
18	Venezuela
19	Ireland
20	Taiwan
21	Switzerland

<b>Grand Total</b>		<b>76,94</b>
1	Canada	20,21
2	Mexico	17,82
<b>Overseas</b>		<b>38,90</b>
3	United Kingdom	4,48
4	Japan	3,59
5	China	3,17
6	South Korea	2,33
7	Germany	2,08
8	Brazil	1,91
9	France	1,66
10	Australia	1,32
11	India	1,28
12	Italy	1,03
13	Argentina	1,01
14	Colombia	84
15	Spain	82
16	Netherlands	70
17	Sweden	52
18	Venezuela	50
19	Ireland	48
20	Taiwan	47
21	Switzerland	44



# The NTTO Travel Forecast Update

2018 Fall Forecast (October 2018)

## Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor		%		%		%		%		%		%		%		%		%
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR	
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17	

	%		%		%		%		%		%		%
Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change
2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22		



# The NTTO Travel

2018 Fall Forecast (October 2017)

Change	% Change	
	23/17	23/17
18,574	24%	3.7%
4,391	22%	3.3%
5,138	29%	4.3%
<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
921	21%	3.2%
106	3%	0.5%
953	30%	4.5%
451	19%	3.0%
217	10%	1.7%
551	29%	4.3%
400	24%	3.6%
287	22%	3.3%
589	46%	6.5%
188	18%	2.8%
233	23%	3.5%
295	35%	5.1%
113	14%	2.2%
120	17%	2.7%
49	9%	1.5%
-20	-4%	-0.7%
200	41%	5.9%
81	17%	2.7%
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2018 Fall Forecast (October 2018)

## Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

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Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>85,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
1	Canada	20,212	5%	21,021	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
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3	United Kingdom	4,483	-2%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	921	21%	3.2%
4	Japan	3,596	-0%	3,596	0%	3,596	0%	3,596	0%	3,596	0%	3,596	0%	3,596	0%	106	3%	0.5%
5	China	3,174	4%	3,174	0%	3,174	0%	3,174	0%	3,174	0%	3,174	0%	3,174	0%	953	30%	4.5%
6	South Korea	2,335	18%	2,335	0%	2,335	0%	2,335	0%	2,335	0%	2,335	0%	2,335	0%	451	19%	3.0%
7	Germany	2,080	2%	2,080	0%	2,080	0%	2,080	0%	2,080	0%	2,080	0%	2,080	0%	217	10%	1.7%
8	Brazil	1,912	11%	1,912	0%	1,912	0%	1,912	0%	1,912	0%	1,912	0%	1,912	0%	551	29%	4.3%
9	France	1,668	2%	1,668	0%	1,668	0%	1,668	0%	1,668	0%	1,668	0%	1,668	0%	400	24%	3.6%
10	Australia	1,324	-2%	1,324	0%	1,324	0%	1,324	0%	1,324	0%	1,324	0%	1,324	0%	287	22%	3.3%
11	India	1,285	7%	1,285	0%	1,285	0%	1,285	0%	1,285	0%	1,285	0%	1,285	0%	589	46%	6.5%
12	Italy	1,032	4%	1,032	0%	1,032	0%	1,032	0%	1,032	0%	1,032	0%	1,032	0%	188	18%	2.8%
13	Argentina	1,018	10%	1,018	0%	1,018	0%	1,018	0%	1,018	0%	1,018	0%	1,018	0%	233	23%	3.5%
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17	Sweden	522	-7%	517	-1%	522	1%	533	2%	549	3%	560	2%	571	2%	49	9%	1.5%
18	Venezuela	500	-15%	500	0%	490	-2%	485	-1%	485	0%	485	0%	480	-1%	-20	-4%	-0.7%
19	Ireland	484	9%	551	14%	590	7%	619	5%	644	4%	664	3%	683	3%	200	41%	5.9%
20	Taiwan	475	2%	489	3%	499	2%	509	2%	524	3%	540	3%	556	3%	81	17%	2.7%
21	Switzerland	441	-6%	455	3%	464	2%	478	3%	492	3%	507	3%	522	3%	81	18%	2.8%

**Forecast Change**

**2018 18/17**

**81,317 5.7%**



# The NTTO Travel Forecast Update

2018 Fall Forecast (October 2018)

## Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor	Actual	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Change	%	CAGR
Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country																	
	<b>Grand Total</b>	76,941	0.7%	81,317	5.7%	83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%	18,574	24%	3.7%
1	Canada	20,212	5%	21,821	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
2	Mexico	17,824	-6%	19,428	9%	20,010	3%	20,611	3%	21,229	3%	22,078	4%	22,961	4%	5,138	29%	4.3%
	<b>Overseas</b>	38,906	2%	40,869	5%	42,025	2.8%	43,225	2.9%	44,755	3.5%	46,382	3.6%	47,951	3.4%	9,046	23%	3.5%
3	United Kingdom	4,483	-2%	4,662	4%	4,755	2%	4,945	4%	5,143	4%	5,298	3%	5,404	2%	921	21%	3.2%

Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change
2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22
83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%

10	Australia	1,324	-2%	1,363	3%	1,391	2%	1,403	1%	1,447	3%	1,519	5%	1,610	6%	287	22%	3.3%
11	India	1,285	7%	1,414	10%	1,485	5%	1,574	6%	1,668	6%	1,768	6%	1,874	6%	589	46%	6.5%
12	Italy	1,032	4%	1,063	3%	1,116	5%	1,139	2%	1,173	3%	1,196	2%	1,220	2%	188	18%	2.8%
13	Argentina	1,018	10%	1,059	4%	1,091	3%	1,112	2%	1,146	3%	1,192	4%	1,251	5%	233	23%	3.5%
14	Colombia	842	-1%	926	10%	982	6%	1,031	5%	1,072	4%	1,104	3%	1,137	3%	295	35%	5.1%
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# The NTTO Travel Forecast Update

2018 Fall Forecast (October 2018)

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Estimates in thousands

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2017	Country																	
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>83,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
1	Canada	20,212	5%	21,021	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
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	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
3	United Kingdom	4,483	-2%	4,662	4%	4,755	2%	4,945	4%	5,143	4%	5,298	3%	5,404	2%	921	21%	3.2%
4	Japan	3,596	-0%	3,488	-3%	3,523	1%	3,558	1%	3,593	1%	3,629	1%	3,702	2%	106	3%	0.5%
5	China	3,174	4%	3,237	2%	3,302	2%	3,401	3%	3,571	5%	3,821	7%	4,127	8%	953	30%	4.5%
6	South Korea	2,335	18%	2,335	0%	2,452	5%	2,550	4%	2,626	3%	2,705	3%	2,786	3%	451	19%	3.0%
7	Germany	2,080	2%	2,143	3%	2,186	2%	2,208	1%	2,230	1%	2,252	1%	2,297	2%	217	10%	1.7%
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# The NTTO Travel Forecast Update

2018 Fall Forecast (October 2018)

## Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor	Actual	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Change	%	CAGR
Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>83,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
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# The NTTO Travel Forecast Update

2018 Fall Forecast (October 2018)

## Forecast of International Travelers to the United States by Top Origin Countries

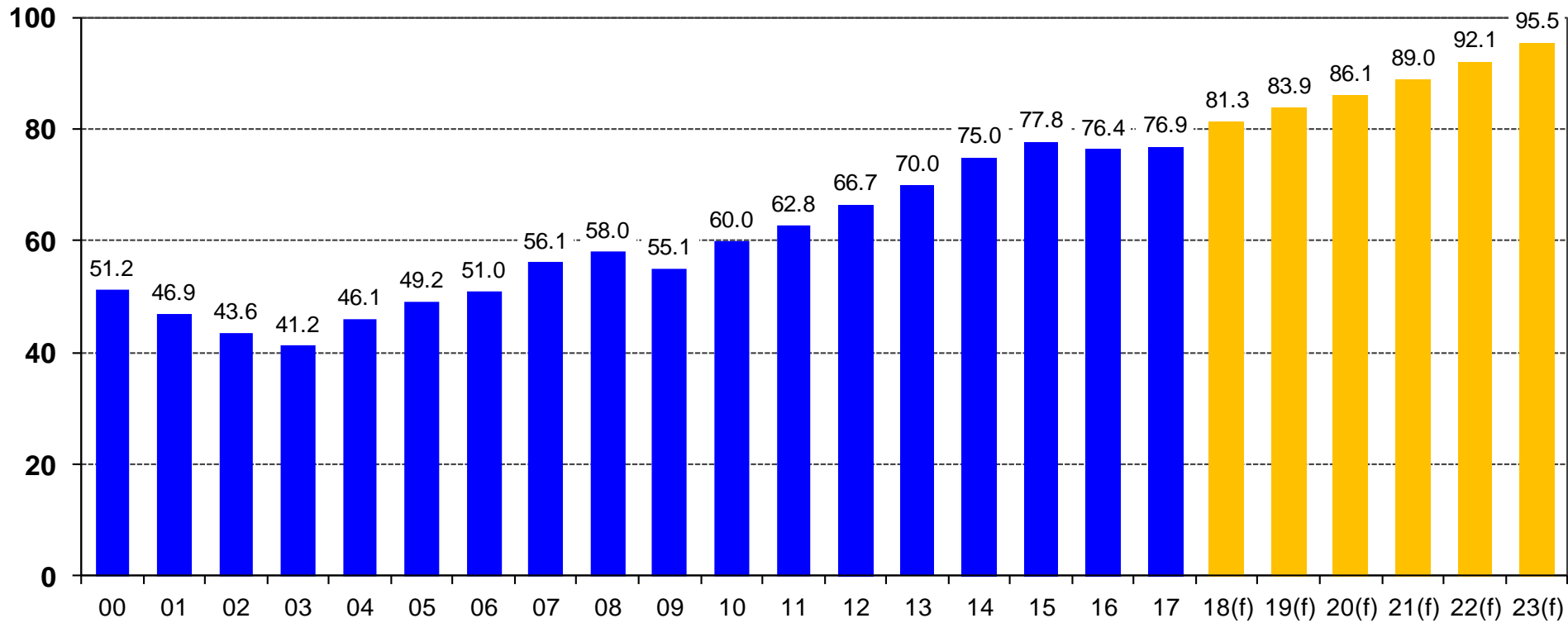
Estimates in thousands

Rank	Visitor		%		%		%		%		%		%		%		%	
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
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	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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# International Visitors to the U.S. and Projections (2000-2023)

millions of international visitors



Sources: U.S. Department of Commerce, ITA, National Travel and Tourism Office; Secretaria de Turismo (Mexico); Statistics Canada. -- Fall 2018 Travel Forecast



# Trends We Watch

## Miscellaneous

- **UNWTO in/out**—Global inbound growth continues, ahead of UNWTO schedule of declining growth rates to 2030. 2016:+3.6%; 2017: +7.0%; 2018YTD: +5.6%. 2019 forecast is return to more typical +3% to +4%. Two-year lag in country-level outbound volumes. 2017 total outbound spending (in own country currency) was up for most top USA origin countries. Similar for 2018YTD
- **USA Arrivals**—up 0.7% in 2017; 2018 YTD Jan-May up 7%. Uneven performance across the top origin markets for both years.
- **USA Travel Exports**—2017 vs. 2016
  - +2.1% Total
  - +1.9% Receipts
  - +8.6 Education/Medical/Seasonal Workers
  - +0.1% Travel Spending (excluding E/M/S)
  - +3.4% Passenger Fares
- **Airline Capacity**—Most top markets had positive monthly seat changes through January 2019. Declines for South Korea. Looking forward six months in 2019...India looking strong. France, Germany, Japan, U.K. are flat to low growth. Declines for South Korea, China, and Brazil. USA outbound visitor volume was up 9% in 2018, and thus using seats.



# Trends We Watch

continued

- **APIS**—a citizenship-based census count of all persons entering/departing the USA via air regardless of residence or purpose. The non-USA citizen count (entering the USA) consistently up 3.5% to 4.5% throughout 2018. Note: includes U.S. residents returning home.
- **BrandUSA**—USG match of up to \$100M capable of being fully funded moving forward based on ESTA fee collections. Excess of about \$50M.
- **IMF country-level forecasts**—semi-annual database release. October release revised suggests first concerns for several years. In IMF words....

*The steady expansion under way since mid-2016 continues, with global growth for 2018–19 projected to remain at its 2017 level. At the same time, however, the expansion has become less balanced and may have peaked in some major economies. Downside risks to global growth have risen in the past six months and the potential for upside surprises has receded.*
- **Industry newsletters/surveys**—We monitor formal and informal survey results.
- **U.S. visa issuance**—FY17 (Oct-Sep) U.S. Dept. of State visa issuance **-9%**, but **-1%** not counting 27% decline for China.
- **Miscellaneous**—gasoline after-tax ‘windfall’ versus several years ago continues, even more so to start 2019. Benefits household finances world-wide.





# Hotel-Motel Room Nights

(millions) assumes 1 room/party

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>Overseas</b>	<b>99</b>	<b>104</b>	<b>95</b>	<b>111</b>	<b>122</b>	<b>136</b>	<b>152</b>	<b>154</b>	<b>170</b>	<b>179</b>	<b>174</b>
Canada	19	21	20	25	27	39	26	32	31	29	30
China	3	2	3	5	5	9	11	17	20	22	21
U.K.	16	17	15	15	15	16	16	18	21	22	19
India	7	7	6	7	7	8	11	10	9	13	12
Japan	9	9	8	11	9	10	10	10	10	10	10
German	7	9	7	8	9	9	9	10	11	11	9
Brazil	3	4	5	6	9	9	11	10	9	9	8
South Korea	3	3	3	5	6	5	6	6	9	7	8
France	4	5	4	5	6	7	8	7	7	7	8
Australia	4	5	4	6	7	7	9	9	10	10	8
Mexico (air)	5	4	5	5	6	7	6	7	7	7	7
Italy	3	3	3	3	3	4	3	4	4	4	4



# Package Travel %

(% used a package on their U.S. trip)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>Overseas</b>	<b>16</b>	<b>16</b>	<b>16</b>	<b>17</b>	<b>16</b>	<b>19</b>	<b>18</b>	<b>17</b>	<b>16</b>	<b>16</b>	<b>15</b>
Canada	-	-	-	-	-	-	-	-	-	-	
Mexico (air)	5	12	7	10	9	8	7	7	8	8	6
U.K.	22	19	18	22	18	18	18	20	17	17	17
Japan	38	41	42	40	40	51	52	50	47	52	45
China	15	16	8	14	19	23	18	20	25	21	17
Germany	7	7	9	10	9	9	9	9	11	10	9
South Korea	16	17	15	19	24	28	28	24	25	21	21
Brazil	11	12	16	14	12	18	15	15	13	12	11
France	12	13	16	16	16	15	14	16	17	13	12
Australia	11	13	9	13	11	12	15	14	9	9	10
India	4	4	4	3	3	6	6	11	9	10	9
Italy	23	19	17	23	22	18	17	14	13	14	16

Color coding: light green-up in 2017; dark green-up strongly; light red-down; dark red-down strongly in 2017. For countries...overall volume change in 2017; for 2017...change in incidence.



# Package Travel #s

(000s used a package on their U.S. trip)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>Overseas</b>	<b>3,871</b>	<b>4,055</b>	<b>3,706</b>	<b>4,455</b>	<b>4,489</b>	<b>5,655</b>	<b>5,799</b>	<b>5,886</b>	<b>6,181</b>	<b>5,901</b>	<b>5,719</b>
Canada	-	-	-	-	-	-	-	-	-	-	
Mexico (air)	126	-	101	162	183	163	146	167	209	191	153
U.K.	1,030	1,002	789	936	790	752	765	853	878	838	869
Japan	1,494	1,577	1,456	1,577	1,499	2,143	2,256	2,048	1,978	2,072	1,830
China	58	69	37	98	189	328	325	430	612	608	532
Germany	108	130	170	187	180	175	186	194	266	212	212
South Korea	128	130	104	205	278	351	389	353	470	437	526
Brazil	74	93	163	183	202	368	348	377	328	218	223
France	116	174	200	232	238	221	215	259	291	212	212
Australia	77	89	70	125	117	141	186	177	136	130	132
India	15	24	19	18	18	34	46	94	99	118	109
Italy	151	158	133	205	206	153	157	141	142	142	177

Color coding: light green-up in 2017; dark green-up strongly; light red-down; dark red-down strongly in 2017. For countries...overall volume change in 2017; for 2017...package volume change.



# Package Travel #s 2017

(000s used a package on their U.S. trip)

	<b>Overseas</b>	<b>5,719</b>			
1	Japan	1,830		12	Argentina 97
2	United Kingdom	869		13	Taiwan 74
3	China	532		14	Spain 63
4	South Korea	526		15	Ireland 57
5	Brazil	223		16	Netherlands 46
6	France	212		17	Switzerland 46
7	Germany	212		18	Sweden 34
8	Italy	177		19	Colombia 34
9	Mexico (Air)	153		20	Denmark 29
10	Australia	132		21	Israel 23
11	India	109		22	8 countries... 17



# Package Traveler Profile!!!

U.S. Department of Commerce  
International Trade Administration  
Industry and Analysis



National Travel and Tourism Office

Market Profile: PACKAGE TRAVELERS



International Trade Administration • Industry and Analysis • National Travel and Tourism Office

- based on NTTO's monthly *Survey of International Air Travelers* (SIAT).
- All the information you want about this travel segment.
- posted to [travel.trade.gov](http://travel.trade.gov)
- FREE! downloadable file in Excel format.
- Annual data back through 1997.
- 2017 update available mid-February; 2018 update available late summer.
- 2017 sample size 4,921!...past years typically larger, 2018 will be larger.
- Custom reports YOU design available for cost-recovery fee.



# Package Travel Insights

## Miscellaneous

- **country of residence**—Japan was one half of package travelers 20 years ago, but is one-third today. China was 0%, and is now 10%. U.K. package travel fluctuates
- **planning**—advance planning is the longest in 20 years. Mean average four months/median three months. 1 in 6 plan more than 6 months out. Trend similar for air booking and for package booking...mean 3 months/median 2 months.
- **guides**—use of guided tours as part of the package a stable 20% the past 6 years.
- **children**—19% incidence of children is inching back up to levels of 20 years ago. Does this vary by country of residence???
- **hotels**—average hotel stay length of 7.5 nights is the longest in 20 years
- **1<sup>st</sup>/repeat**—a stable 2/3 of package travelers are U.S. repeat visitors.
- **destinations**—...
- **activities**—...



# BREXIT



- U.K. is the 2<sup>nd</sup> largest source for package travelers to the USA.
- Is Brexit included in the forecast?
- Will it impact air travel?



## Key Takeaways...

- 1) Global travel remains robust based on the sum of country arrivals and 2018YTD outbound spending. Growth in 2019 may be lower, but lower from higher-than-originally-forecasted levels.
- 2) USA volume increased in 2017, but country performances were uneven. 2018 YTD through May was strong growth. No available data suggests 2018 won't end strong, perhaps a bit less strong.
- 3) NTTO forecast calls for a new volume record in 2018...and continue through 2023. Four countries will account for nearly 2/3 of the growth over the forecast period—Mexico, Canada, China, and U.K.
- 4) Shifts in international producing hotel-motel room nights, and what you thought you knew may be wrong. Room nights are led by Canada, China, U.K., and India. 2017 declines often a combination of flat/lower overall volume, slightly lower incidence, slightly shorter hotel/motel stays.
- 5) Package travelers...download the package traveler profile!





# How to Find Us

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