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Top International Markets for Overseas Visitors to National Parks

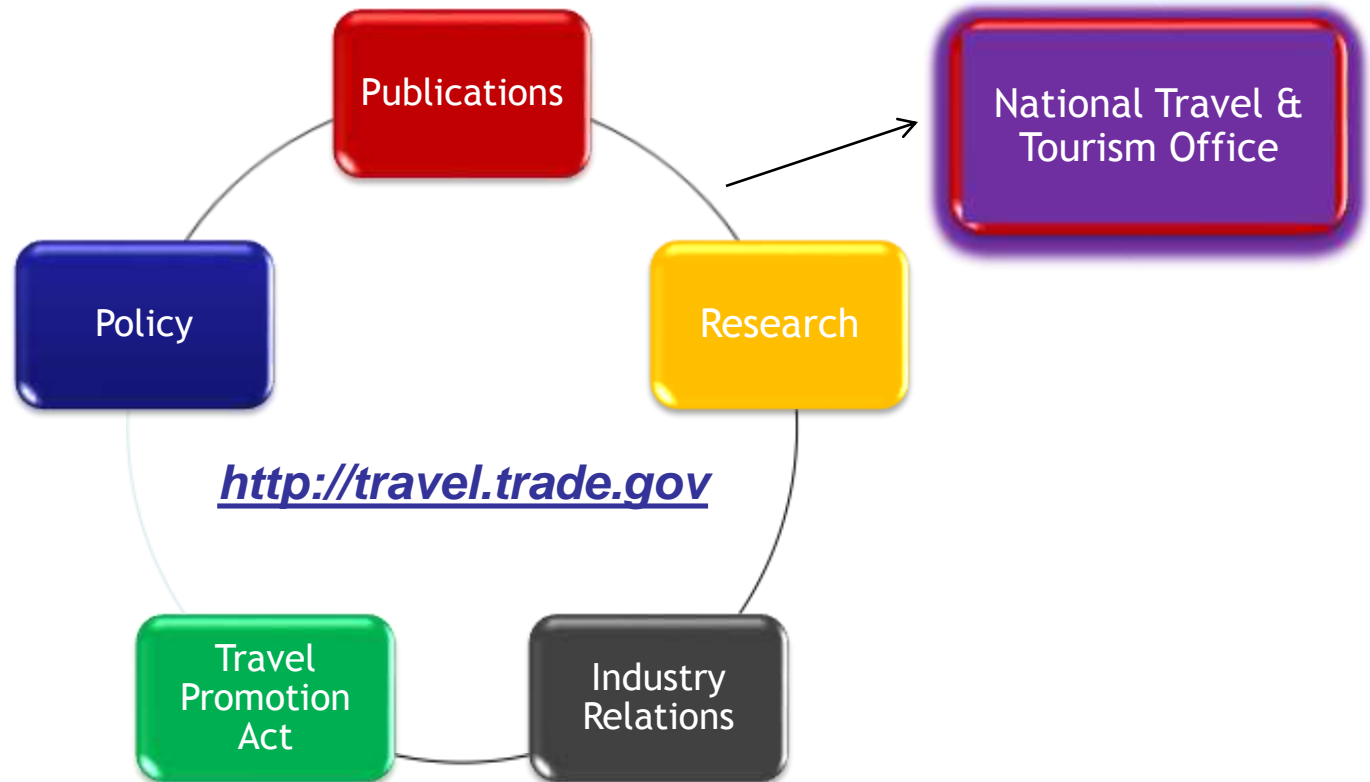


Ron Erdmann
U.S. Department of Commerce
International Trade Administration
National Travel & Tourism Office
November 2015



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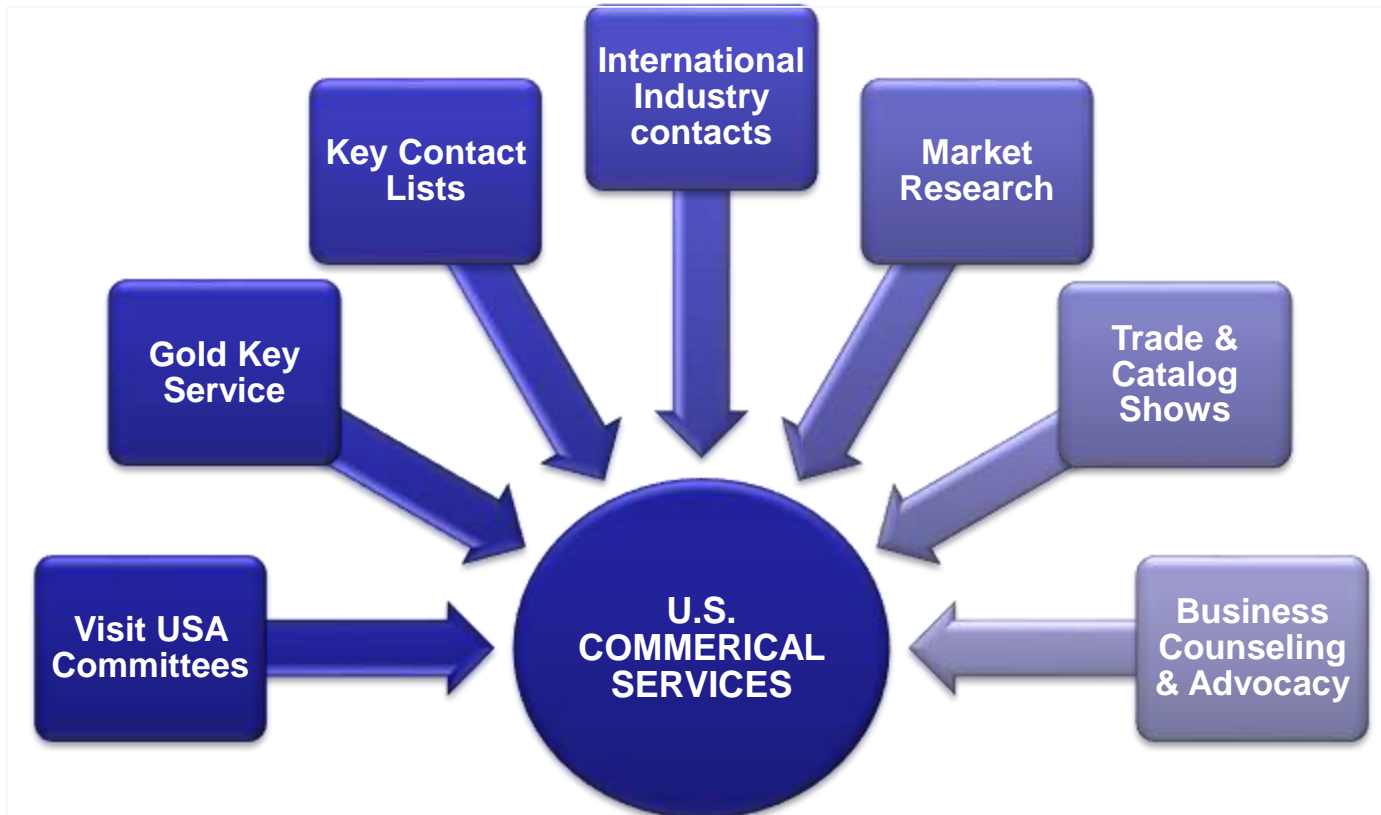
www.export.gov/industry/travel/

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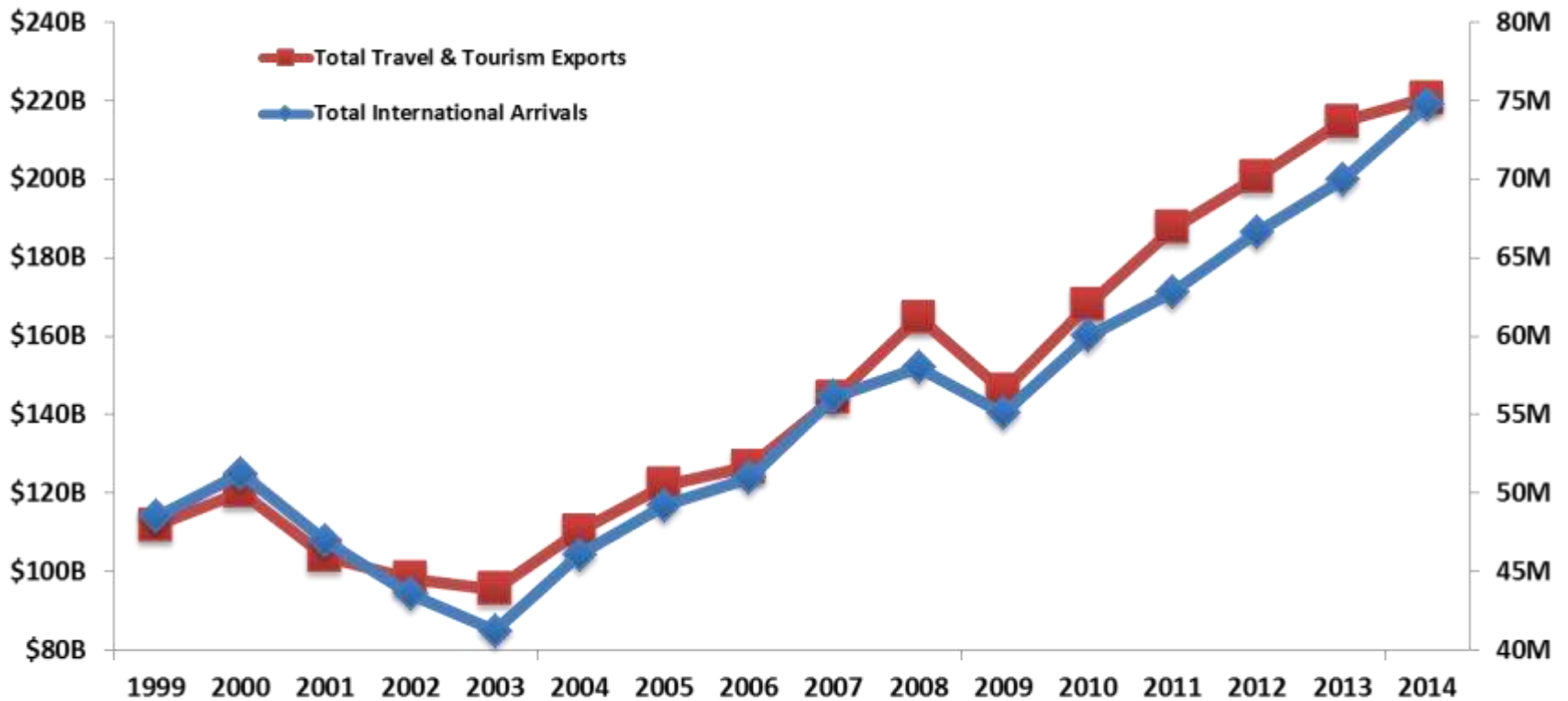
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Travel Trends to the U.S.





U.S. Visitors & Spending(1999-2014^p)









(p) Preliminary, subject to future revisions.

Sources: Department of Commerce, National Travel and Tourism Office; Department of Commerce, Bureau of Economic Analysis; Statistics Canada; Banco de Mexico.



Top Preliminary Travel & Tourism Export Markets 2014r in \$ Billions

Origin Country	Travel Receipts	Passenger Fare Receipts	Total Travel Receipts	2013/2014 % change
Canada	\$20.7	\$5.6	\$26.3	-4%
China	\$21.5	\$2.5	\$24.0	14% 
Mexico	\$15.6	\$3.1	\$18.7	3% 
Japan	\$12.1	\$5.6	\$17.7	-0%
United Kingdom	\$10.1	\$3.4	\$13.5	2%
Brazil	\$9.7	\$3.7	\$13.4	8% 
India	\$8.1	\$1.7	\$9.8	10% 
South Korea	\$7.6	\$0.2	\$7.8	11% 
Germany	\$5.6	\$1.8	\$7.4	2%
Australia	\$5.4	\$0.8	\$6.2	-9%
Total Travel Exports	\$177.2	\$43.5	\$220.8	3% 





Top Origin Markets for International Travelers to the U.S. 2014r

Rank	Market of Origin	Visitors (000)	% change	
--	Total Arrivals *	75,011	7%	
--	Overseas Arrivals **	34,938	9%	
1	Canada	23,003	-2%	
2	Mexico	17,070	17%	
3	United Kingdom	4,149	8%	
4	Japan	3,730	-3%	
5	Brazil	2,264	10%	
6	China (PRC)	2,190	21%	
7	Germany	2,056	7%	
8	France	1,658	10%	
9	Republic of Korea	1,460	7%	

* International travelers include all countries generating visitors to the U.S.

** Overseas includes all countries except Canada and Mexico.



Record year for travel to U.S.



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Forecast for International Travel to the United States





2014 Actual Arrivals & Short-Term Forecast Inbound Travel to the U.S.

Visitor Origin	2014 (000)	% Change	2015 (000)	% Change	2016 (000)	% Change
Total Visitors	75,011	7%	75,334	0%	77,280	3%
Overseas	34,938	9%	36,248	4%	37,868	4%
Canada	23,003	-2%	21,163	-8%	20,951	-1%
Mexico	17,070	17%	17,923	5%	18,461	3%
United Kingdom	4,149	8%	4,440	7%	4,617	4%
Japan	3,620	-3%	3,548	-2%	3,512	-1%
Brazil	2,264	10%	2,355	4%	2,284	-3%
China	2,190	21%	2,562	17%	2,972	16%
Germany	2,056	7%	2,118	3%	2,161	2%
France	1,658	10%	1,642	-1%	1,675	2%



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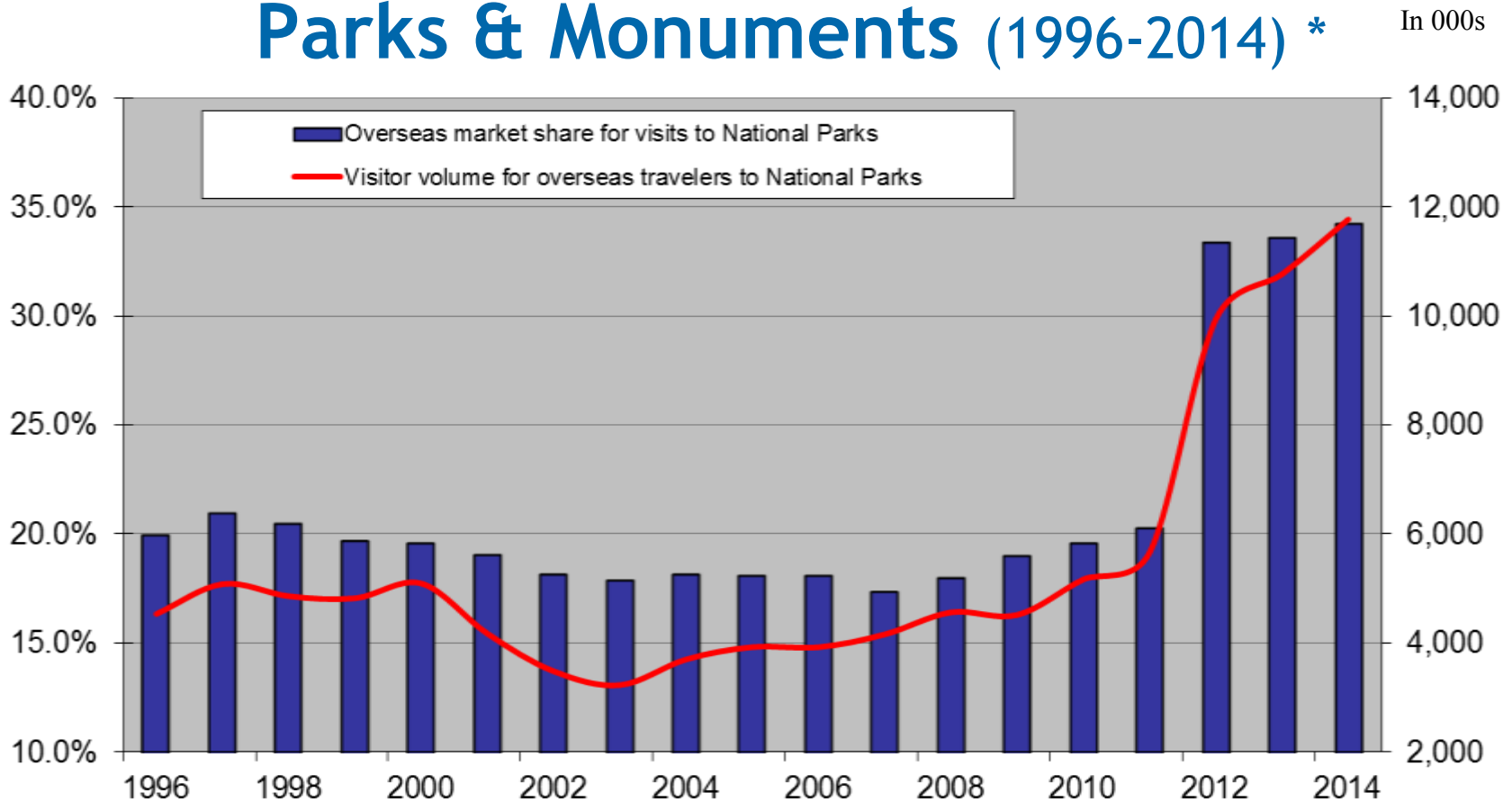
2016

National Park Service
CENTENNIAL

Visitation Estimates & Traveler Characteristics of Overseas Travelers to National Parks & Monuments



Trends in Total Overseas Visitors to National Parks & Monuments (1996-2014) *



Overseas includes all countries except Canada & Mexico

* Note, in 2012-2014 shifts occurs because of name change to add Monuments, so estimates are not directly comparable



Visiting National Parks & Monuments: Regions of Origin 2013 vs. 2014

Origin Market	Visit National Parks 2013 (000)	Visit National Parks 2014 (000)	% Change 2013/2014
Overseas *	10,765	11,771	9%
Europe	5,339	5,767	8%
Asia	1,999	2,333	17%
South America	1,558	1,628	4%
Oceania/Pacific	795	882	11%

* Overseas includes all countries except Canada & Mexico



Visiting National Parks & Monuments: Country of Origin 2013 vs. 2014

Origin Market	Visit National Parks 2013 (000)	Visit National Parks 2014 (000)	% Change 2013/2014
Overseas	10,756	11,771	9%
United Kingdom	1,408	1,498	6%
Germany	790	882	12%
China	668	869	30%
France	731	791	8%
Brazil	719	772	7%
Australia	699	738	6%



Selected Key Traveler Characteristics Overseas Visitors to the USA compared to Visitors to National Parks & Monuments 2014

Characteristic	Visit National Parks 2014	Overseas Travelers to the USA 2014	Point Change
Use of Packages	16%	17%	-1%
First International Trip to USA	29%	24%	5%
Main Purpose of Trip - Vacation	65%	58%	7%
Main Purpose of Trip - VFR	20%	18%	2%
Nights in the USA	23	18	5
Number of States Visited	1.9	1.5	0.4
Number of Destinations Visited	2.8	2.0	0.8



Top Ports Of Entry by Overseas Travelers to the U.S. & National Parks & Monuments - 2014

Overseas Travelers To National Parks - Top Ports	All Overseas Travelers To the U.S. - Top Ports
<p>New York (JFK) - 23%</p> <p>Los Angeles (LAX) - 16%</p> <p>Miami (MIA) - 10%</p> <p>San Francisco (SFO) - 8%</p> <p>Newark (EWR) - 6%</p> <p>Honolulu (HNL) - 5%</p> <p>Chicago (ORD) - 4%</p> <p>Washington (IAD) - 4%</p> <p>Atlanta (ATL) - 3%</p>	<p>New York (JFK) - 18%</p> <p>Miami (MIA) - 14%</p> <p>Los Angeles (LAX) - 11%</p> <p>Honolulu (HNL) - 7%</p> <p>Newark (EWR) - 6%</p> <p>San Francisco (SFO) - 6%</p> <p>Chicago (ORD) - 5%</p> <p>Agana, Guam (GUM) - 3%</p> <p>Orlando (MCO) - 3%</p>



Transportation Used by Overseas Visitors to the USA compared to Visitors to National Parks & Monuments 2014

Mode of Transport	Visit National Parks 2014	Overseas Travelers to the USA 2014	Point Change
Rented Auto	42%	35%	6%
Airlines in the U.S.	39%	30%	9%
Company or Private Auto	34%	32%	2%
City Subway/Tram/Bus	45%	31%	14%
Taxi/Cab/Limo	36%	33%	3%
Bus Between Cities	22%	18%	5%



Top States Visited by Overseas Travelers to the U.S. & National Parks & Monuments - 2014

Overseas Travelers To Native American Sites - State Visited*	All Overseas Travelers To the U.S. - State Visited
New York (41%) California (32%) Florida (19%) Nevada (18%) Hawaii (9%) Arizona (7%) Massachusetts (6%) Pennsylvania (4%) Illinois (4%) Utah (4%) Texas (4%)	New York (29%) Florida (25%) California (21%) Hawaiian Islands (9%) Nevada (9%) Texas (5%) Massachusetts (4%) Illinois (4%) Guam (4%) Pennsylvania (3%) New Jersey (3%)

* Note: trip information is collected separately for destinations visited while in the U.S. and activities. Thus, visitors to a state may not have visited a Native American site in that state.



Activity Participation Overseas Visitors to the USA compared to Visitors to National Parks & Monuments 2014

Activity	Visit National Parks 2014	Overseas Travelers to the USA 2014	Point Change
Visiting National Parks/Mom. *	100%	34%	66%
Shopping	93%	88%	5%
Sightseeing *	91%	77%	14%
Visit Historical Locations *	51%	26%	24%
Art Gallery/Museum	50%	28%	22%
Small Towns/Countryside *	47%	28%	19%
Experience Fine Dining *	46%	38%	8%
Amusement/Theme Parks	40%	29%	11%
Guided Tours	39%	23%	16%

* New Activity categories starting in 2012



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