



International Travel to the United States

Focus on National Parks & American Indian - Alaska Native Tourism



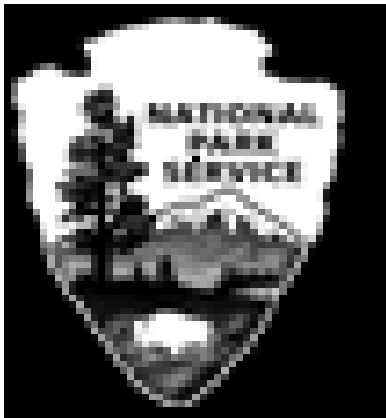
INTERNATIONAL
TRADE
ADMINISTRATION



Ron Erdmann
U.S. Department of Commerce
International Trade Administration
Office of Travel and Tourism (OTTI)
March 2011



INTERNATIONAL
TRADE
ADMINISTRATION

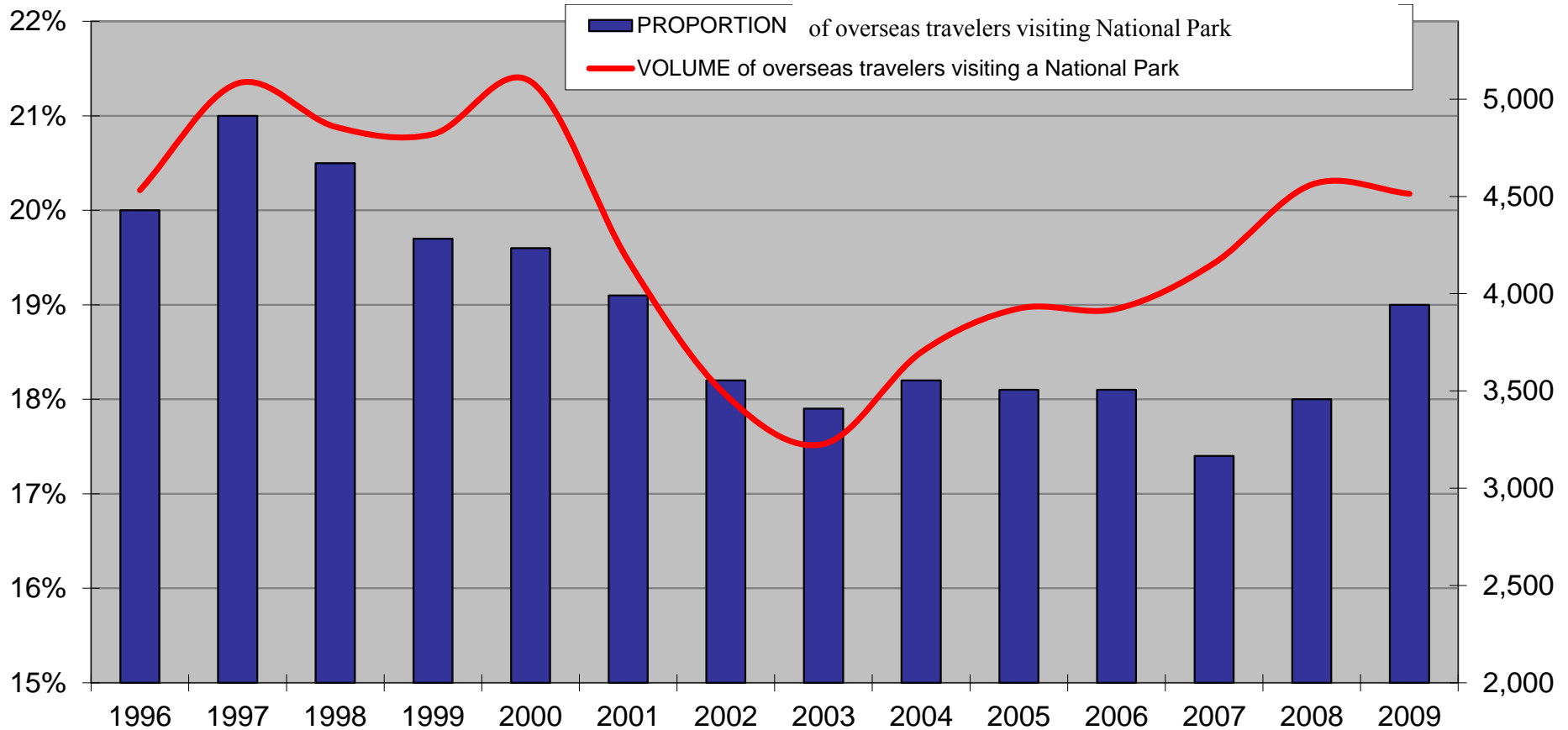


Visitation Estimates & Traveler Characteristics of Overseas Travelers to National Parks & American Indian Communities



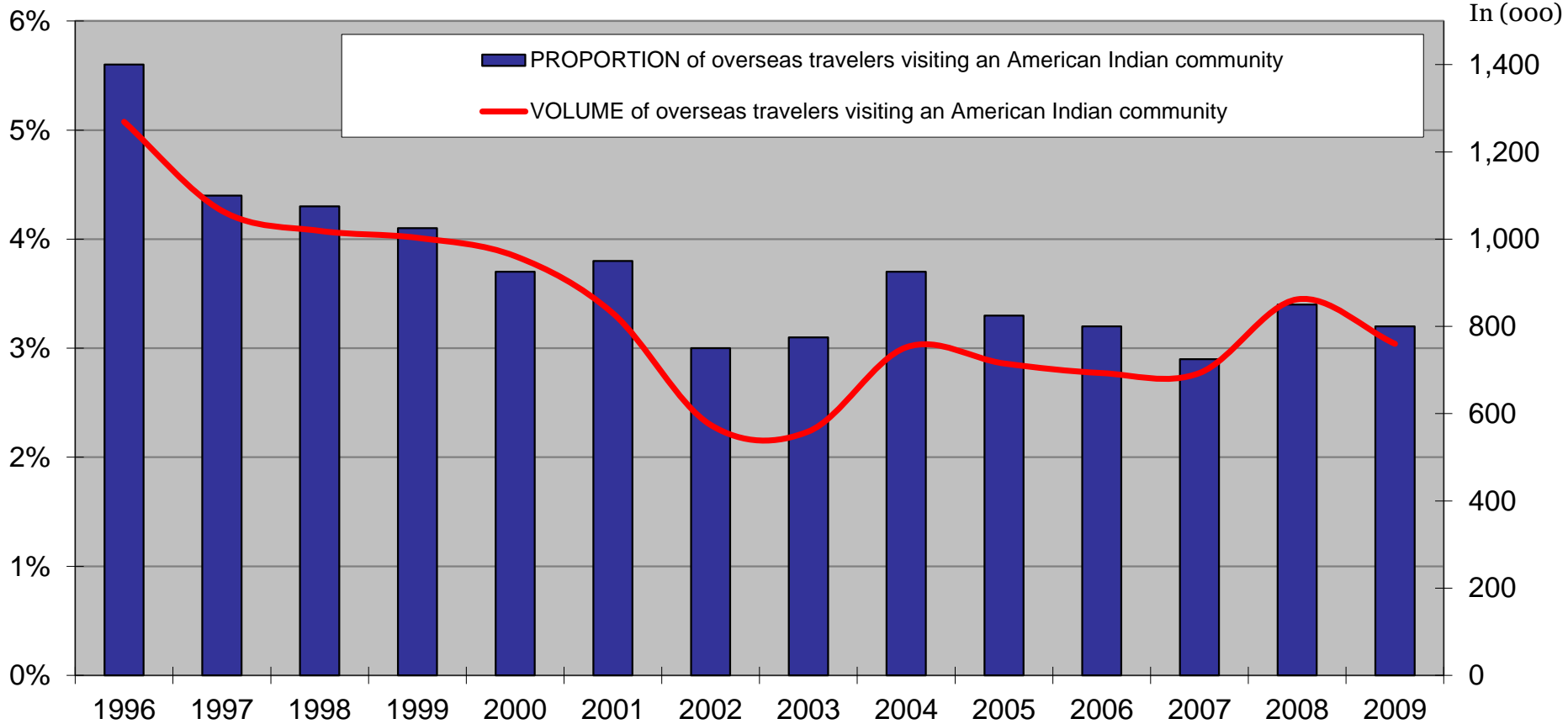
Trends in Total Overseas Visitors to National Parks (1996-2009)

In (000)





Trends in Total Overseas Visitors to American Indian Communities (1996-2009)





Overseas Visitors to the USA 2009

Top Countries

Origin Market	Overseas Visitors to the U.S. 2009 (000)	Overseas Visitors National Parks 2009 (000)	Overseas Visitors to Native Amer. Sites 2009 (000)
Overseas	23,756	4,514	760
U.K.	3,899	819	117
Japan	2,918	257	*
Germany	1,687	520	125
France	1,204	372	89
Brazil	893	131	*
Italy	753	139	*

* Specific participation estimates not available, but would be the next largest markets



Information Sources & Trip Decision Times Overseas Visitors to the USA for National Parks & Native American Communities Visited 2009

Information Sources	Overseas Travelers to the USA 2009	Overseas Travelers to National Parks 2009	Visit Amer. Indian Comm. 2009
Personal Computer/Internet	43%	53%	49%
Travel Agency	36%	36%	36%
Airlines Directly	22%	24%	19%
Friends/Relatives	16%	21%	20%
Travel Guides	8%	14%	14%
Tour Companies	7%	8%	11%
Advance Trip Decision Time	86	121	140
Advance Airline Ticket Res.	62	85	92



Selected Key Traveler Characteristics

Overseas Visitors to the USA compared to Visitors to National Parks & American Indian Communities 2009

Characteristic	Overseas Travelers to the USA 2009	Overseas Travelers to National Parks 2009	Visit Amer. Indian Comm. 2009
Use of Packages	16%	17%	25%
First International Trip to USA	25%	33%	39%
Main Purpose of Trip - Vacation	52%	65%	64%
Main Purpose of Trip - VFR	21%	20%	19%
Nights in the USA	18	26	33
Number of States Visited	1.5	2.1	2.6
Number of Destinations Visited	2.0	3.1	3.9



Transportation Used by Overseas Visitors to the USA compared to Visitors to National Parks & American Indian Communities 2009

Mode of Transport	Overseas Travelers to the USA 2009	Overseas Travelers to National Parks 2009	Visit Amer. Indian Comm. 2009
Taxi/Cab/Limousine	41%	36%	35%
Rented Auto	29%	43%	45%
City Subway/Tram/Bus	26%	32%	30%
Airlines in the U.S.	25%	34%	36%
Company or Private Auto	25%	25%	30%
Railroad Between Cities	11%	13%	13%



Top States Visited by Overseas Travelers to the U.S. & Native American Sites – 2009

Overseas Travelers To National Parks-State Visited & Washington D.C.	Overseas Travelers To Native American Sites - State Visited & Washington D.C.
California (43%) New York (34%) Nevada (23%) Florida (18%) Arizona (11%) Washington, DC (9%) Utah (7%) Massachusetts (7%) Hawaii (6%) Illinois (6%)	California (52%) Nevada (43%) New York (28%) Arizona (24%) Utah (17%) Florida (14%) Washington, DC (8%) Massachusetts Colorado Illinois

•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 National Park or Native American site in that state.



Activity Participation Overseas Visitors to the USA compared to Visitors to National Parks & American Indian Communities 2009

Activity	Overseas Travelers to the USA 2009	Overseas Travelers to National Parks 2009	Visit Amer. Indian Comm. 2009
Shopping	88%	89%	90%
Dining in Restaurants	84%	86%	87%
Sightseeing in Cities	44%	67%	69%
Visit Historical Places	39%	67%	73%
Amusement/Theme Parks	28%	42%	50%
Visit Small Towns	26%	53%	65%
Art Gallery/Museum	24%	38%	36%
Cultural Heritage Sites	23%	48%	62%
Visit National Parks	19%	100%	77%
Touring Countryside	19%	46%	58%
Visit Am. Indian Comm.	3%	13%	100%



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. Department of Commerce support of travel & tourism occurs in



International Trade Administration (ITA)

Manufacturing and Services (MAS)

Services (S)

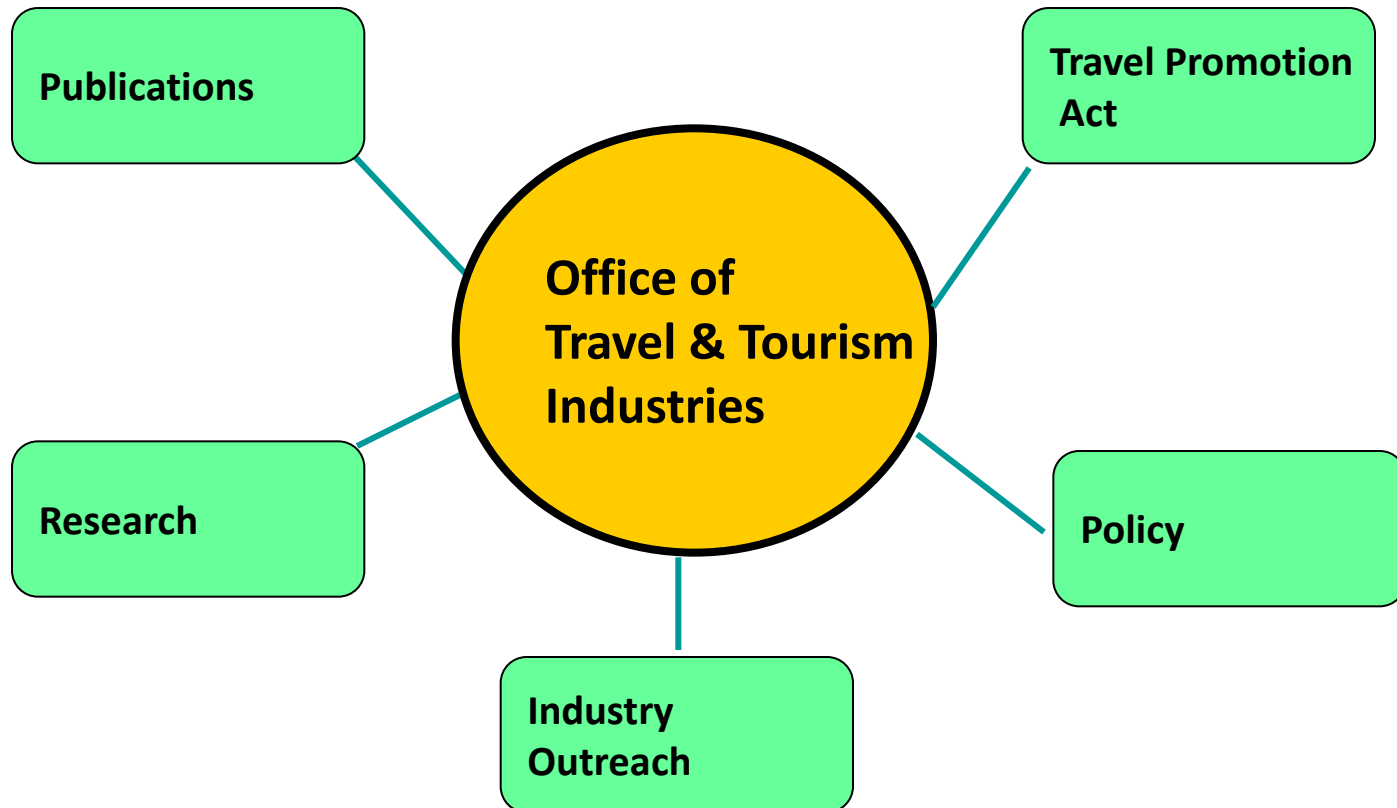
**Office of Travel and Tourism Industries
(OTTI)**



INTERNATIONAL
TRADE
ADMINISTRATION

OTTI Serves as the National Tourism Office for the USA

<http://www.tinet.ita.doc.gov/>





ROLE of Statistics and Data

- Performance Measures
- Assessing Impacts & Affects of Plans and Program
- Communicating & Reporting Results
- Tracking Revenue and Receipts/Spending
- Volume data—Numbers of Visitors/Markets of Origin and Market Share
- Economic Impact
- Tracking Trends and Shifts in Travel Patterns



ROLE of Statistics and Data (continued)

- Identify Partners
- Help Identify Message Presented to Travelers
- Where to Place Marketing Efforts
- When to Place Message
- Length of Stay – Day Trippers vs. Overnight
- Purpose of Trip
- Accommodations – Hotel/Motel vs. others
- Transportation Used While Within the USA



U.S. Department Of Commerce

International Trade Administration Tourism Resources

OFFICE OF TRAVEL & TOURISM INDUSTRIES

Foreign Commercial Service
151 Offices in 83 Countries

<http://trade.gov/cs/>

Office of Domestic Operations
105 U.S. Offices

<http://export.gov/industry/travel/index.asp>



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. COMMERCIAL SERVICE



Selected Services Provided

- International Industry Contacts/Partnerships/Matchmaking
- International Market Research/Country Commercial Guides
- Trade & Catalog Shows, Missions, & Fam Tours
- Business Counseling & Advocacy
- Key Contact Lists: Travel Trade & Media
- Gold Key Service, Single Company Promotion & More
- Connected to the Visit USA Committees

<http://www.export.gov/industry/travel/>

<http://trade.gov/cs/>



INTERNATIONAL
TRADE
ADMINISTRATION

Travel Trends to the United States





International Travel & Tourism to the U.S.

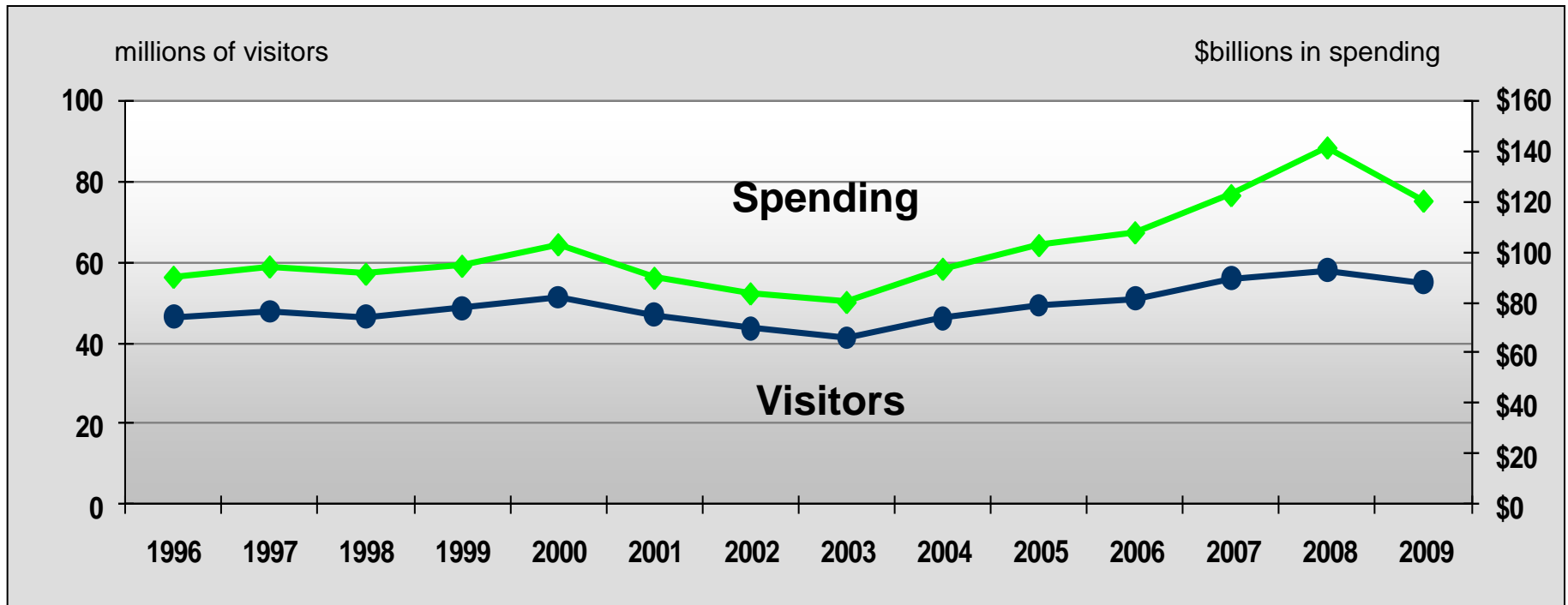
(2009)

- Largest services sector export –\$120 billion.
- Third-largest merchandise/services export category.
- Generated a trade surplus of \$21 billion.
- Supported 1.2 million jobs.
- International travelers spend 4-7 times more than domestic travelers on a trip:
 - Length of the trip is 2-4 times greater than domestic travelers.
 - International travelers have higher activity participation rates than domestic travelers.
 - International travelers were more inclined to stay at hotels/motels & rent cars than a domestic traveler.
- 4% of travelers, but 17% of traveler spending, payroll, employment and taxes.



U.S. Visitors & Spending (1996-2009)

Visitor spending (receipts) closely mirrors visitor volume. Spending \$120 billion in 2009, while visitor volume was 55.0 million.



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



Export Value Rank Varies from Visitation Rank

<u>Ranking</u>		Origin Country	Total Travel Receipts 2009 (\$bil)
Visitors	Receipts		
1	1	Canada	\$16.13
4	2	Japan	\$13.05
3	3	United Kingdom	\$11.43
2	4	Mexico	\$8.05
5	5	Germany	\$5.57
7	6	Brazil	\$4.57
6	7	France	\$4.12
14	8	China	\$3.60
12	9	India	\$3.57
10	10	Australia	\$3.42
U.S. TOTAL			\$120.34



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

Origin of Visitor	2009 (000s)	09 / 08 (% change)	09/03 (% change)
International Total *	54,958	-5%	33%
1 Canada	17,973	-5%	42%
2 Mexico	13,229	-3%	25%
Overseas **	23,756	-6%	32%
3 United Kingdom	3,899	-15%	-1%
4 Japan	2,918	-10%	-8%
5 Germany	1,687	-5%	43%
6 France	1,204	-3%	75%
7 Brazil	893	16%	156%
8 Italy	753	-3%	84%
9 South Korea	744	-2%	20%
10 Australia	724	5%	78%

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

** Overseas includes all countries except Canada and Mexico.



Top U.S. Destinations¹ for Overseas Visitors (2009)

Top States	Market Share	Top Cities	Market Share
New York	33.7%	New York City	32.8%
Florida	22.2%	Miami	11.2%
California	19.5%	Los Angeles	10.6%
Nevada	8.0%	Orlando	10.1%
Hawaii	7.8%	San Francisco	9.4%
Massachusetts	5.3%	Las Vegas	7.8%
Illinois	4.9%	Washington, D.C.	6.5%
Guam	4.8%	Honolulu.	6.3%
New Jersey	3.9%	Boston	4.8%
Texas	3.8%	Chicago	4.7%

¹ These percentages are based on multiple responses.



INTERNATIONAL
TRADE
ADMINISTRATION

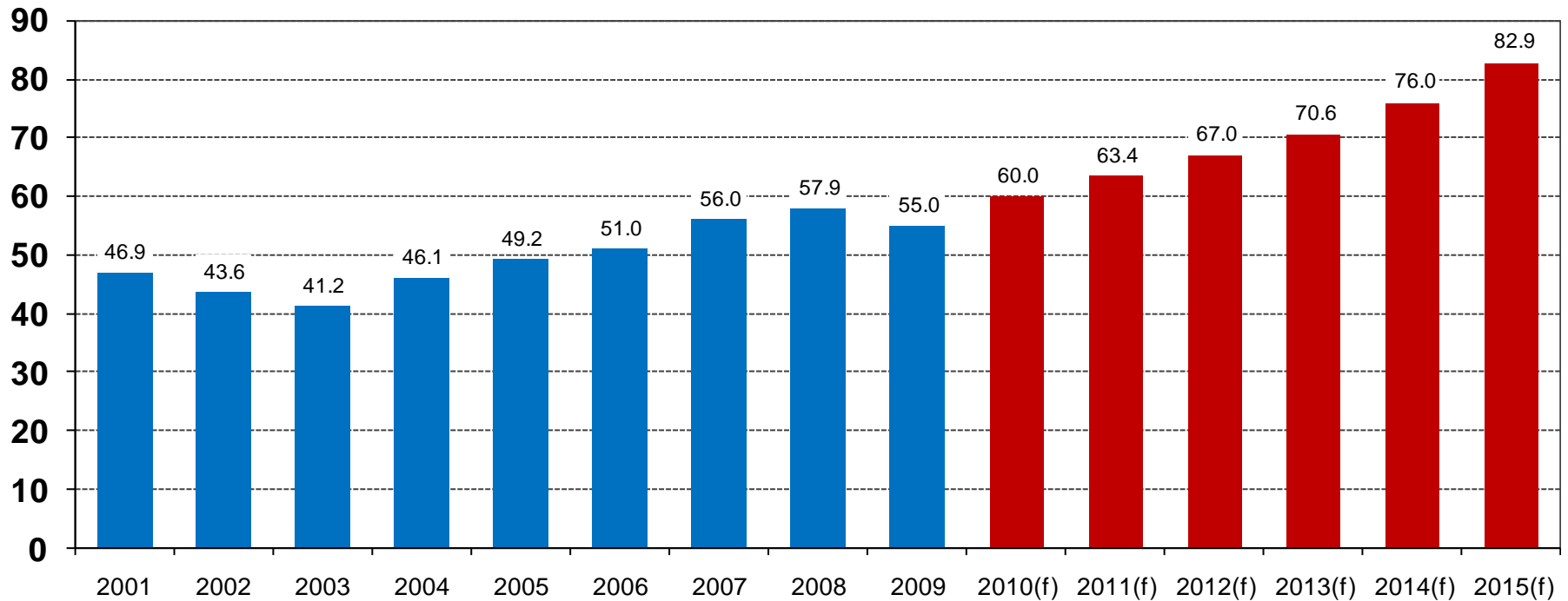
What's in the Future For Us?





Visitor Projections Show Positive Position for NEI Focus on Travel & Tourism

Arrivals in Millions



Sources: U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries; Secretaria de Turismo (Mexico); Statistics Canada. -- October 2010 forecast



Short-Term Forecast

Inbound Travel to the U.S.

Visitor Origin	Actual	Change	Change		Change	
	2009	09/08	2010f	10/09	2011f	11/10
	(000s)	(%)	(000s)	(%)	(000s)	(%)
Grand Total	54,958	-5%	59,956	9%	63,374	6%
North America	31,202	-5%	34,241	10%	36,150	6%
Canada	17,973	-5%	19,760	10%	20,946	6%
Mexico	13,229	-3%	14,480	9%	15,204	5%
Overseas *	23,756	-6%	25,715	8%	27,223	6%
Europe	11,550	-10%	11,658	1%	11,907	2%
Asia	5,669	-8%	6,738	19%	7,381	10%
South America	2,742	7%	3,180	16%	3,507	10%
Caribbean	1,206	5%	1,264	5%	1,328	5%
Oceania	872	2%	1,028	18%	1,139	11%
Central America	758	-2%	770	2%	814	6%
Middle East	666	-2%	752	13%	795	6%
Africa	294	-7%	325	11%	353	8%

* Overseas includes all countries except Canada and Mexico.

Sources: OTTI; Statistics Canada; Banco de Mexico - October 2010 forecast



Long-Term Forecast – Top Future Markets

Inbound Travel to the U.S.

Visitor Origin (Ranked by 2015)	Actual 2009 (000s)	Change 09/08 (%)	2015f (000s)	Change 15/09 (%)
Grand Total	54,958	-5%	82,848	51%
1. Canada	17,973	-5%	26,432	47%
2. Mexico	13,229	-4%	19,742	49%
3. United Kingdom	3,899	-15%	4,719	21%
4. Japan	2,918	-10%	4,285	47%
5. Brazil	893	16%	2,662	198%
6. China	525	6%	2,341	346%
7. Germany	1,687	-5%	2,273	35%
8. Korea	744	-2%	2,105	171%
9. France	1,204	-3%	1,566	30%
10. Australia	724	5%	1,288	78%
11. India	549	-8%	1,226	123%

Sources: OTTI; Statistics Canada; Banco de Mexico - from OTTI October 2010 forecast



Top Travel Export Markets 2009 vs. 2015

China, Brazil & India Displace Germany, France

	CANADA	JAPAN	CHINA	U.K.	BRAZIL	MEXICO	INDIA
2009 Billions	\$12.8	\$9.5	\$2.8	\$8.8	\$3.3	\$6.0	\$2.6
2009 Rank	1	2	8	3	6	4	9
2015 Billions	\$23.7	\$19.7	\$16.1	\$13.8	\$13.6	\$12.0	\$8.0
2015 Rank	1	2	3	4	5	6	7



INTERNATIONAL
TRADE
ADMINISTRATION

Putting the Pieces Together





INTERNATIONAL
TRADE
ADMINISTRATION

DOC's Engagement with Travel & Tourism



Gary F. Locke, Secretary, DOC



The World

Organisation for Economic Co-operation and Development (OECD)

Asia-Pacific Economic Cooperation (APEC)

Multilateral organizations' tourism committees to advance policy agenda



U.S. Government

Tourism Policy Council (TPC) Interagency council to coordinate on tourism policy

Office of Travel and Tourism Industries (OTTI)/ Office of Travel Promotion (OTP)

DOC/ITA/MAS offices responsible for travel and tourism & liaison to CTP



Industry

Travel & Tourism Advisory Board (TTAB)

Private sector advisory board to the Secretary

Corporation for Travel Promotion (CTP)

Private sector corporation board appointed by the Secretary to promote the USA



INTERNATIONAL
TRADE
ADMINISTRATION

Tourism Policy Council

Secretary of Commerce leads the **Tourism Policy Council**
based on the *National Tourism Organization Act of 1996*

PURPOSE: Coordinate national policies and programs related to travel and tourism, recreation, and national heritage resources

OBJECTIVES:

- Provide single point of contact for industry and agencies
- Synthesize travel and tourism data
- Ensure senior level commitment at the inter-agency level
- Provide conduit between USG and TTAB



Agencies of the Tourism Policy Council

Department of Agriculture
Department of Commerce
(EDA/USFCS/NOAA/MBDA)
Department of Homeland Security
Department of Housing & Urban Development
Department of Interior
Department of Labor
Department of State
Department of Transportation
Executive Office of the President
Office of the Vice President
Office of Management & Budget
Small Business Administration
U.S. Army Corps of Engineers

Additionally Invited:

*President's Committee on the Arts and
the Humanities*

Environmental Protection Agency

*Department of Health and Human
Services*

*Advisory Council on Historic
Preservation*



Travel & Tourism Advisory Board

Who?

- Chartered in 2003
- 30 members in 2010-2011
- Appointed by the Secretary of Commerce
- Represent the diverse nature of the travel & tourism industry

What?

- Advises the Secretary on policies and programs that affect the U.S. travel & tourism industry
- Offers counsel on current and emerging issues
- Provides a forum for discussing and proposing solutions to industry-related challenges



Travel Promotion Act

- Signed by President Obama March 4, 2010
- Establishes an independent nonprofit **Corporation for Travel Promotion**:
 - To promote the U.S. to world travelers
 - To augment USG communications on entry/exit policies





INTERNATIONAL
TRADE
ADMINISTRATION

Corporation for Travel Promotion



Caroline Beteta
President and CEO,
California Travel &
Tourism Commission,
Sacramento, CA



Stephen Cloobek
Chairman and CEO,
Diamond Resorts
International,
Las Vegas, Nevada



George Fertitta
CEO,
NYC & Company,
New York, N.Y.



Daniel Halpern,
President and CEO,
Jackmont Hospitality,
Atlanta, Georgia



Tom Klein
President,
Sabre Holdings,
Southlake, Texas



David Lim
Chief Marketing
Officer,
Amtrak,
Washington, D.C.



Mark Schwab
Senior Vice President-
United Airlines,
Chicago, Illinois



Diane Shober
Tourism Director,
State of Wyoming,
Cheyenne, Wyo.



Al Weiss
President, Worldwide
Operations, Walt Disney
Parks and Resorts,
Orlando, Florida



Roy Yamaguchi
Owner and Founder,
Roy's Restaurant,
California



Lynda S. Zengerle
Partner,
Steptoe & Johnson LLP,
Washington, D.C.



National Export Initiative

- Goal: Double exports over the next 5 years
- Created Export Promotion Cabinet
- Focuses on three key areas:
 - 1. Expanding trade advocacy
 - 2. Improving access to credit for small and medium-sized businesses
 - 3. Continuing enforcement of international trade laws



Supporting the President's National Export Initiative

Target Industry Sectors

Healthcare / Medical Devices
Infrastructure
Defense
Environmental / Energy
Technology Industries
Education

Travel and Tourism





Travel & Tourism As a Leading Export (2009)

Travel & Tourism exports **\$120 billion**

Percentage of total exports **8%**

Percentage of service exports **24%**

Travel trade surplus **\$21 billion**

Employment from tourism exports **1.2 million**



INTERNATIONAL
TRADE
ADMINISTRATION

The Quickest Way to U.S. International Tourism Information:

<http://tinet.ita.doc.gov>

Includes International Travel Research Online

Order, read, download & print the latest statistics on international travel to and from the U.S.

- All of the latest summary tables highlighting specific tourism trends
- Nearly 30 market and regional profiles available
- Forecast of international travelers to the U.S. through 2015
- Information on OTTI's nine on-going market analysis (research) programs
- Updated monthly statistics on arrivals and departures
- Late-breaking **TI News** announcements and information releases
- Links and information on the Commerce, Commercial Service Travel & Tourism Team in the USA & Abroad
- Links to other organizations in the travel industry

Sign up for **TI News**, OTTI's FREE news service, for the latest in tourism industry news and program updates