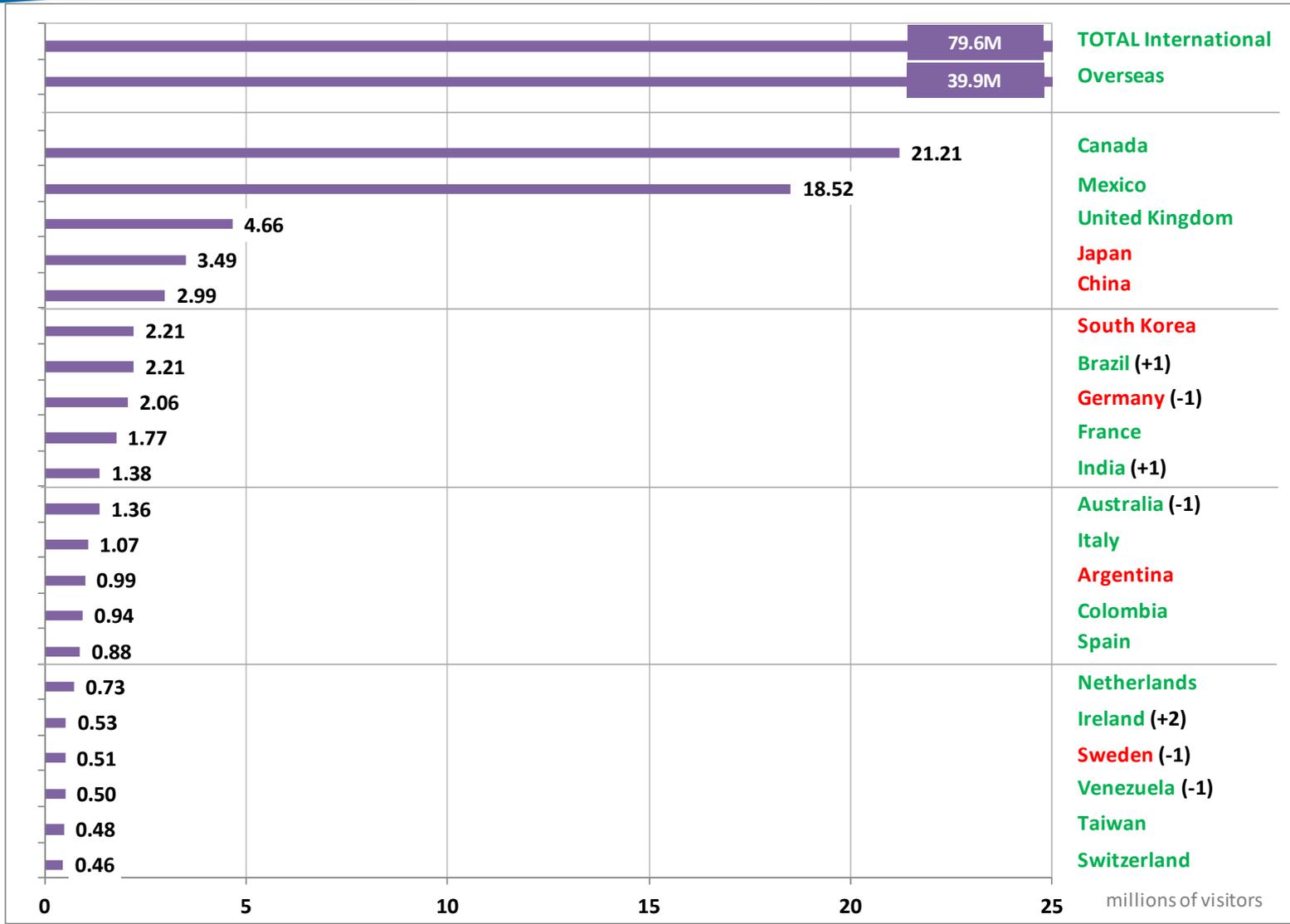# Forecast for International Travel

Presented by:

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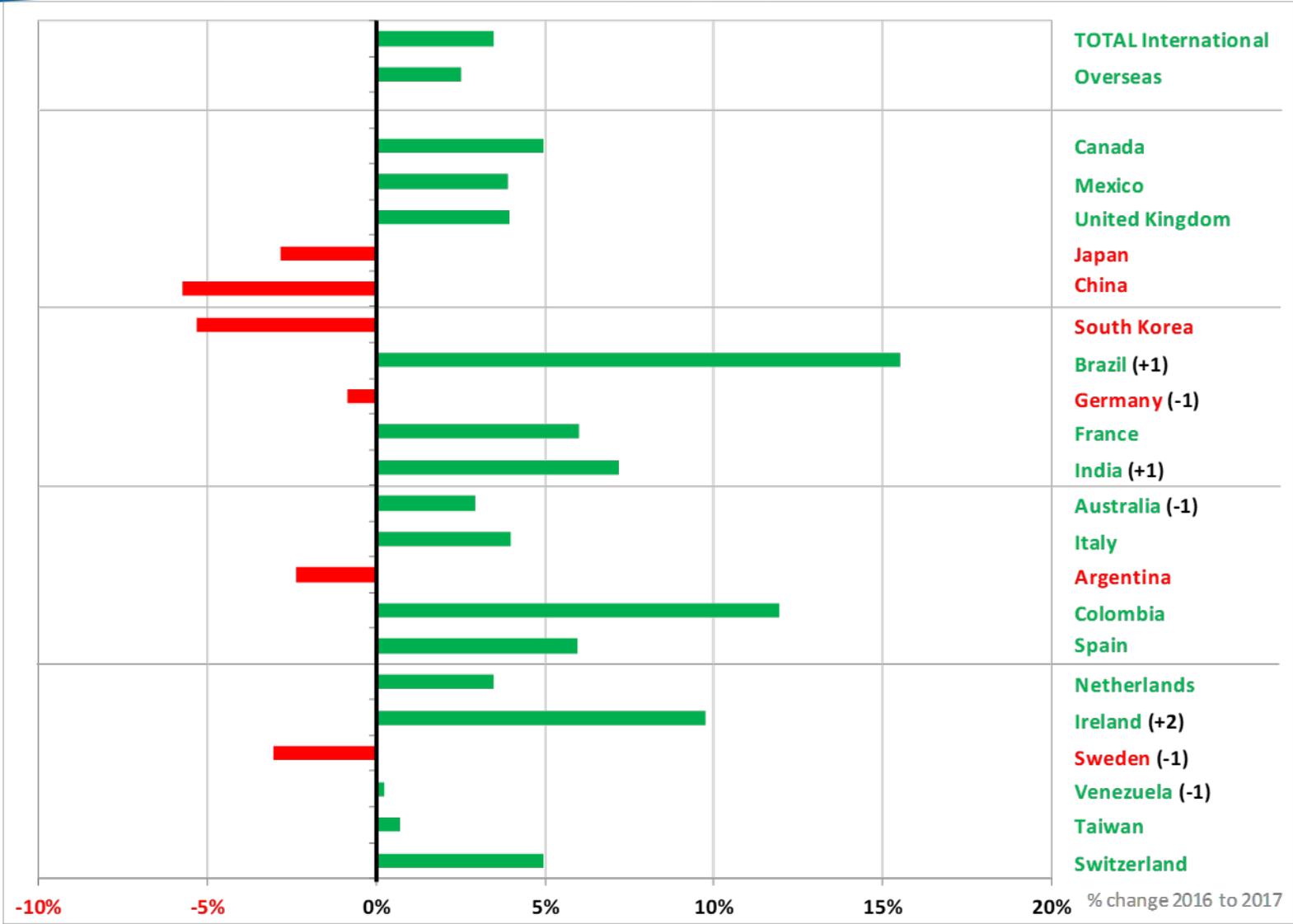**U.S. Department of Commerce**

Visitor Volume 2018
(millions)

Country	Millions of visitors
TOTAL International	79.6M
Overseas	39.9M
Canada	21.21
Mexico	18.52
United Kingdom	4.66
Japan	3.49
China	2.99
South Korea	2.21
Brazil (+1)	2.21
Germany (-1)	2.06
France	1.77
India (+1)	1.38
Australia (-1)	1.36
Italy	1.07
Argentina	0.99
Colombia	0.94
Spain	0.88
Netherlands	0.73
Ireland (+2)	0.53
Sweden (-1)	0.51
Venezuela (-1)	0.50
Taiwan	0.48
Switzerland	0.46

millions of visitors

Visitor Volume **Percent Change** 2017 to 2018

% change 2016 to 2017

Country	
TOTAL International	
Overseas	
Canada	
Mexico	
United Kingdom	
Japan	
China	
South Korea	
Brazil (+1)	
Germany (-1)	
France	
India (+1)	
Australia (-1)	
Italy	
Argentina	
Colombia	
Spain	
Netherlands	
Ireland (+2)	
Sweden (-1)	
Venezuela (-1)	
Taiwan	
Switzerland	

Visitor Volume Change 2017 to 2018
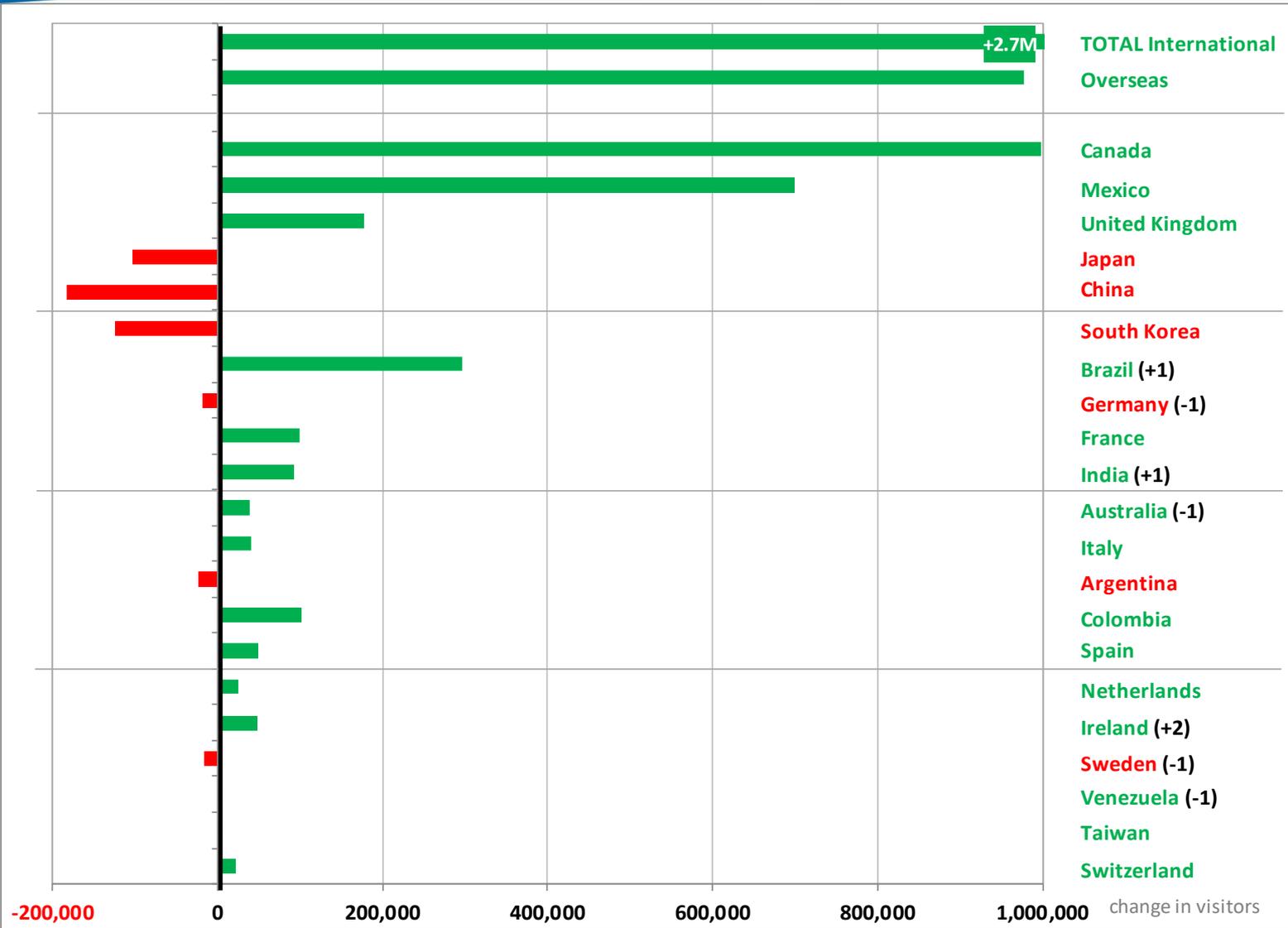
change in visitors

Visitor Spending 2018 (or 2017)
($billions)

Country	$billions
TOTAL International	$256B
Overseas	$212B
China	$36.4B
Canada	$22.1
Mexico	$21.1
Japan	$16.0
United Kingdom	$15.8
India	$15.7
Brazil	$11.5
South Korea	$11.0
Australia	$8.4
Germany	$8.3
France	$6.3
Argentina	$4.8
Italy	$3.4
Venezuela	$3.3
Saudi Arabia (2017)	$3.1
Spain (2017)	$2.8
Netherlands	$2.7
Switzerland (2017)	$2.4
Taiwan	$2.2
Ireland (2017)	$2.0
Sweden (2017)	$1.8
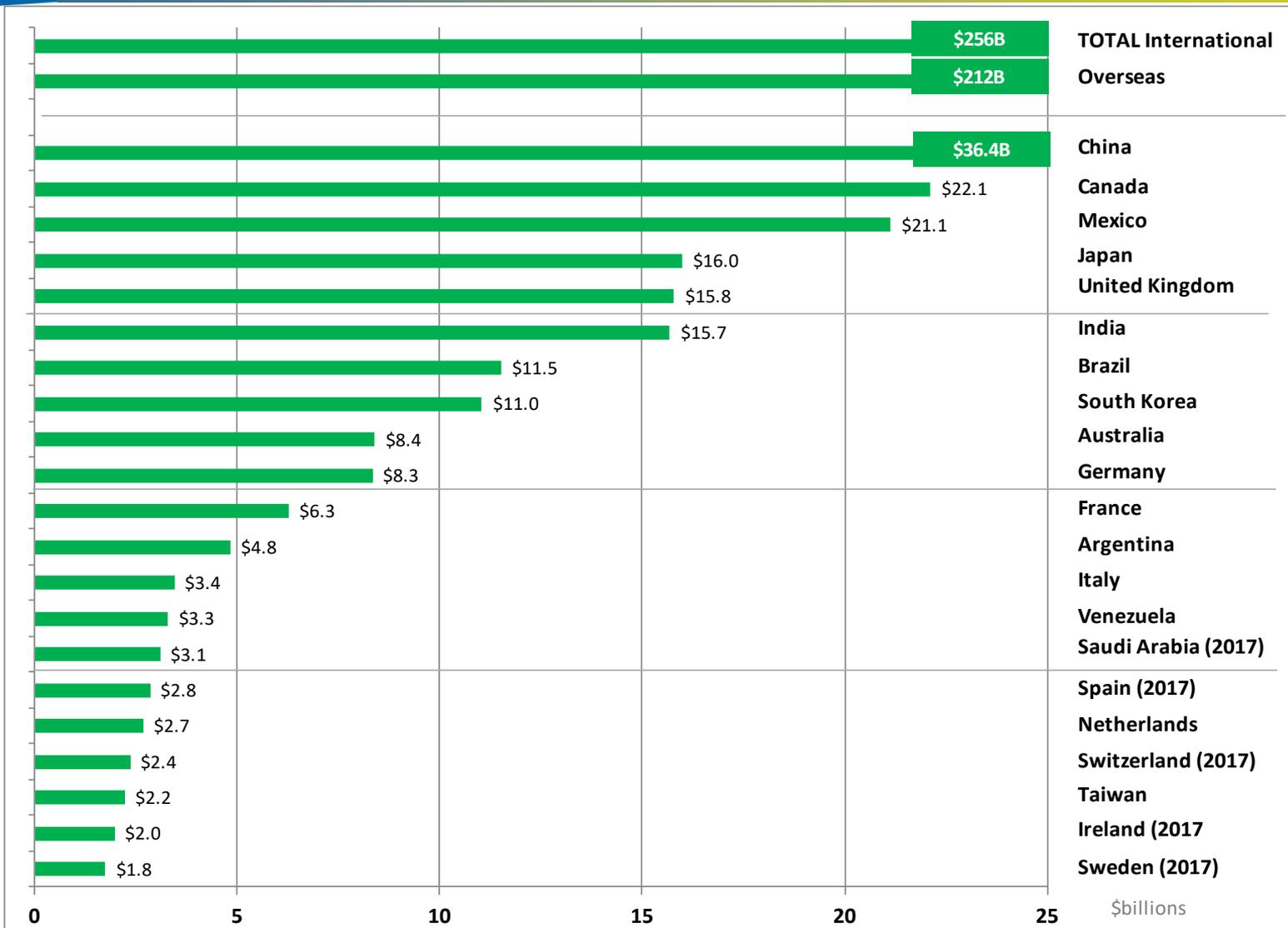
Visitor Spending Percent Change 2017 to 2018
(%)

% change 2016 to 2017

Country	
TOTAL International	
Overseas	
China	
Canada	
Mexico	
Japan	
India	
United Kingdom	
Brazil	
South Korea	
Australia	
Germany	
France	
Argentina	
Italy	
Venezuela	
Saudi Arabia (2017)	-18%
Spain (2017)	
Netherlands	
Switzerland (2017)	
Taiwan	
Ireland (2017)	
Sweden (2017)	

Chart axis: -10%, -8%, -6%, -4%, -2%, 0%, 2%, 4%, 6%, 8%, 10%
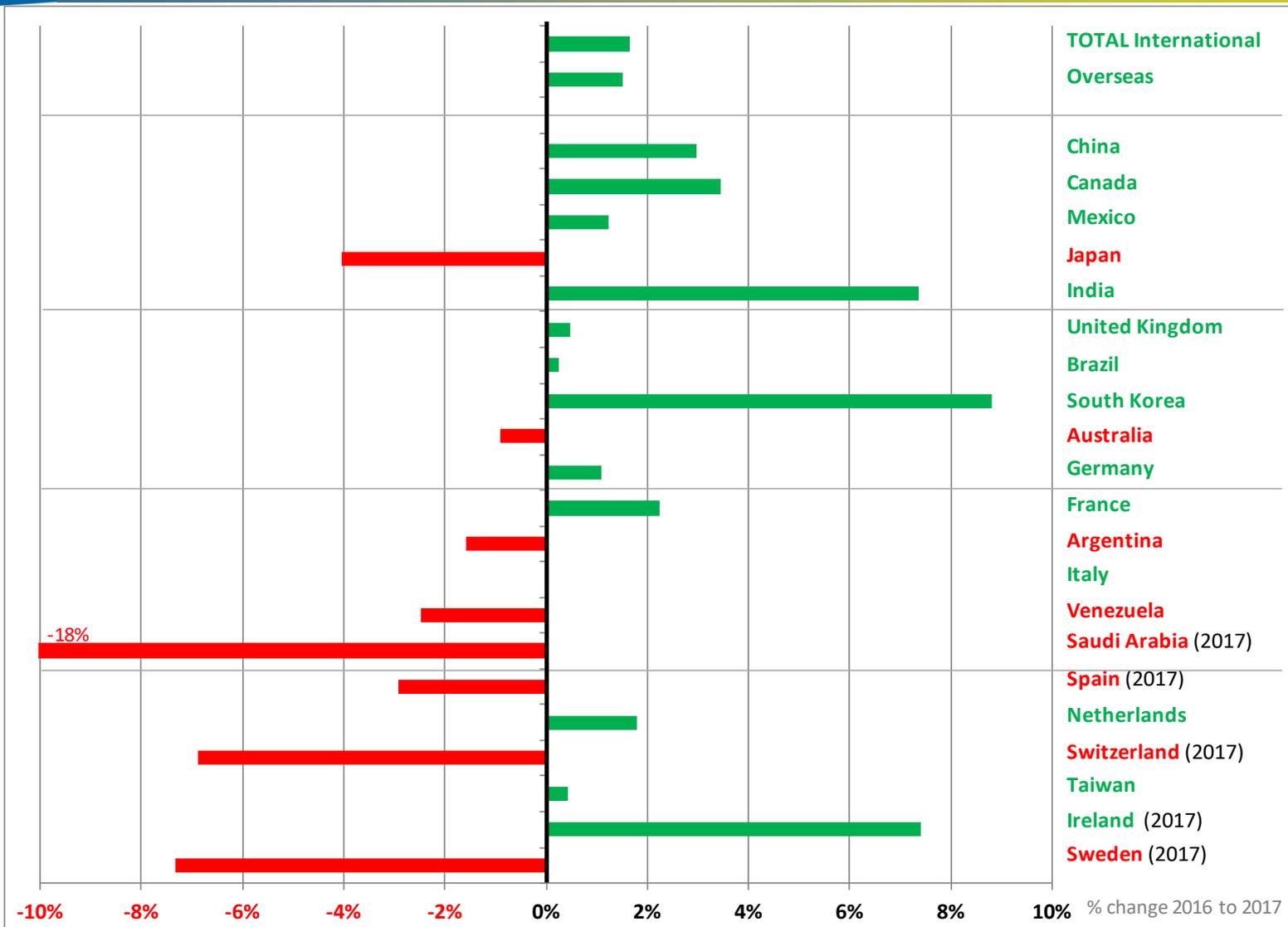
Visitor Spending Change 2017 to 2018

Category	Value
TOTAL International	+4.2B
Overseas	+3.2B
China	
Canada	
Mexico	
Japan	
India	
United Kingdom	
Brazil	
South Korea	
Australia	
Germany	
France	
Argentina	
Italy	
Venezuela	
Saudi Arabia (2017)	
Spain (2017)	
Netherlands	
Switzerland (2017)	
Taiwan	
Ireland (2017)	
Sweden (2017)	

-$1B $0B $1B $2B $billions of spending
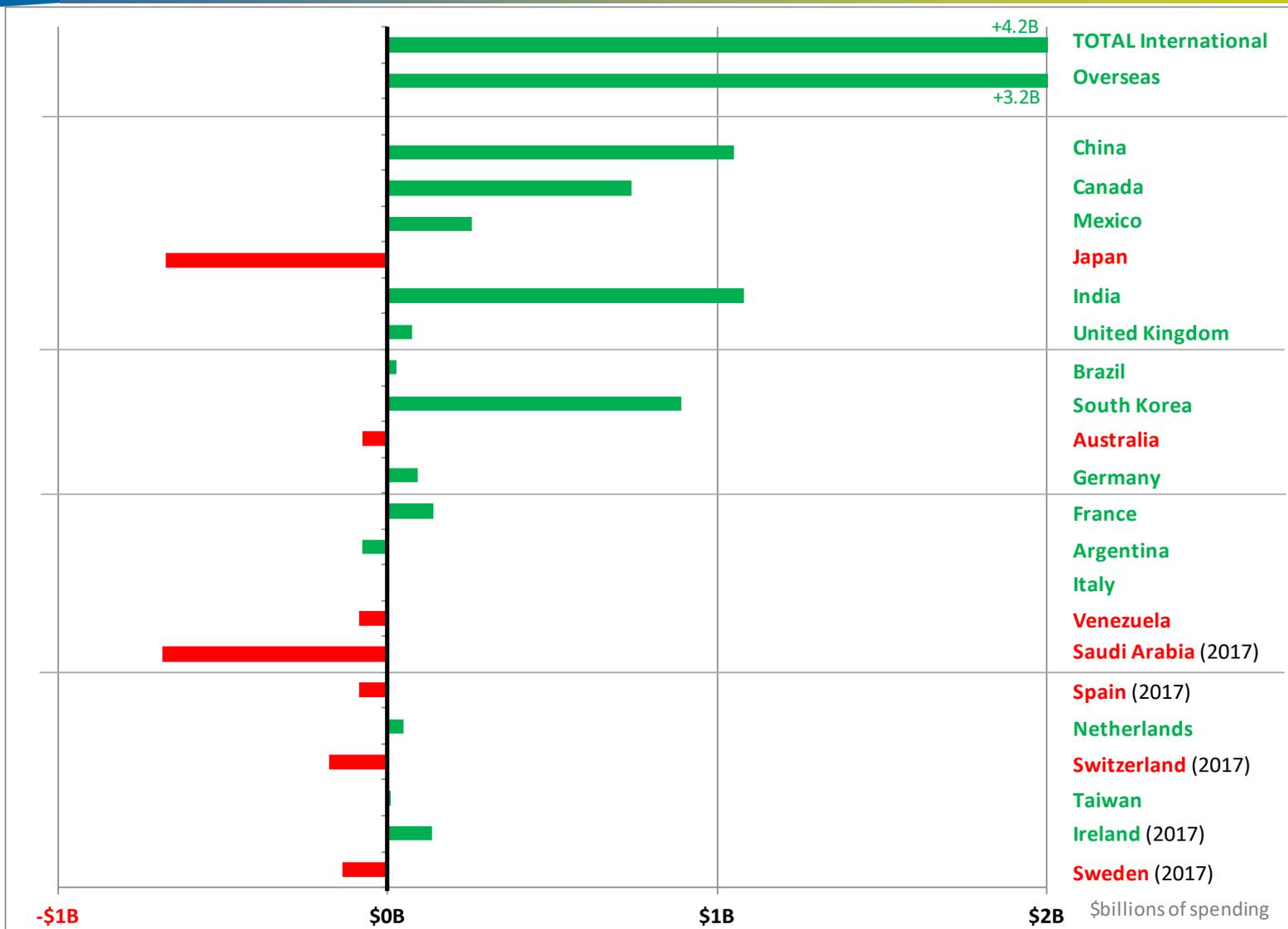
U.S. Visitor and Spending Trends

(millions / $billions)

millions of visitors

$billions of spending

Legend: — Visitors — Spending
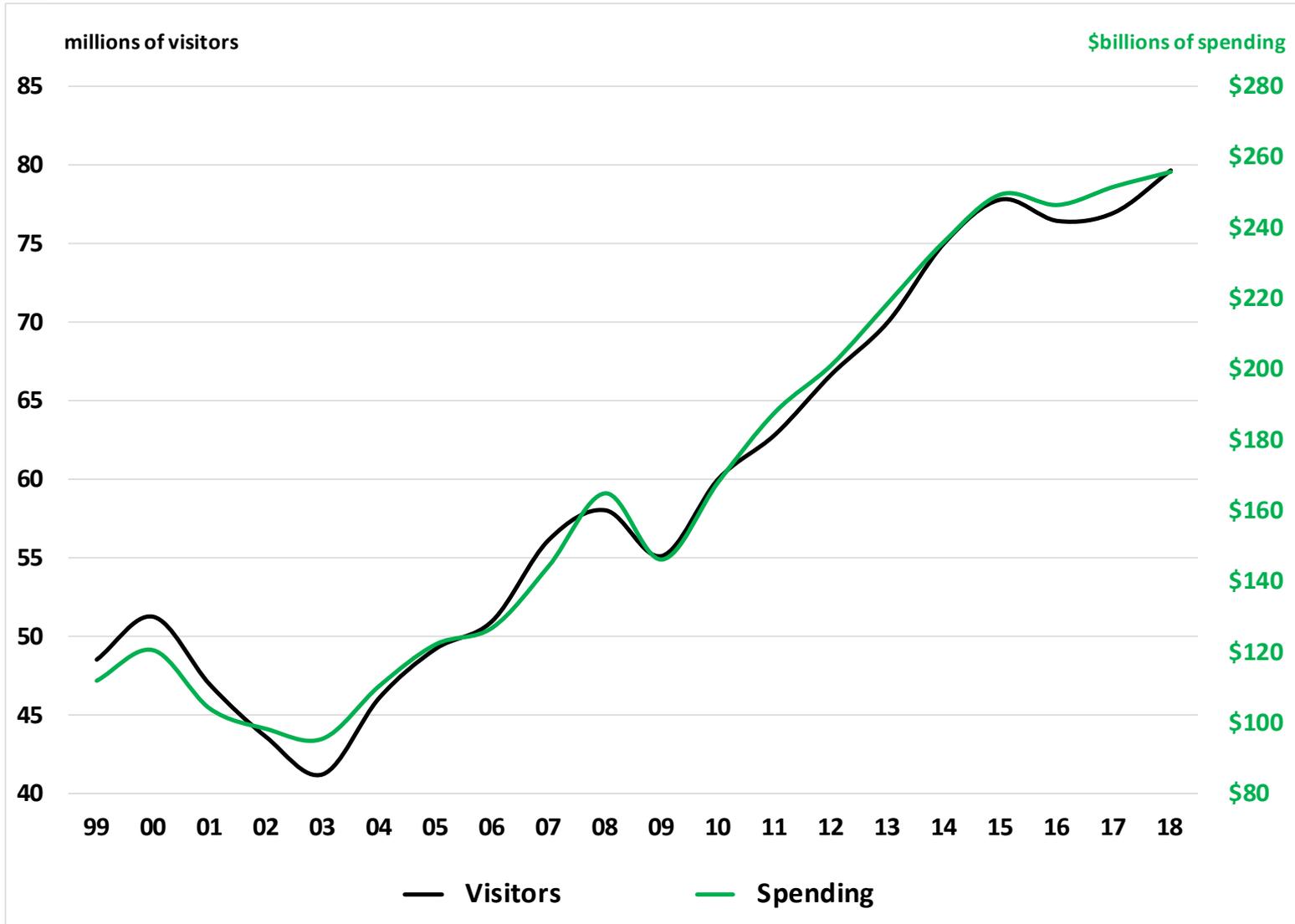
U.S. Visitor and Spending Top Tens

(millions / $billions)

	2018 Arrivals (millions)	18/17	Record Year		2018 Spending (billions)	18/17	Record Year
Canada	20.21	4.9%	2013	China	$36.35	3.0%	2018
Mexico	17.82	3.9%	2016	Mexico	$21.12	1.2%	2018
United Kingdom	4.48	3.9%	2015	Canada	$22.11	3.5%	2013
Japan	3.60	-2.8%	1997	Japan	$15.97	-4.0%	2000
China	3.17	-5.7%	2017	United Kingdom	$15.67	0.5%	2015
South Korea	2.33	-5.3%	2017	India	$15.78	7.4%	2018
Brazil	1.91	15.5%	2014	Brazil	$11.50	0.2%	2014
Germany	2.08	-0.9%	2015	South Korea	$11.04	8.8%	2018
France	1.67	6.0%	2018	Australia	$8.40	-0.9%	2015
India	1.29	7.2%	2018	Germany	$8.34	1.1%	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 (%)
	All Countries	**$1,340**			**All Countries**	**1,329**	
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%

Forecast of International Travelers to the United States by Top Origin Countries
Estimates in thousands

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

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

Estimates in thousands

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

2018 Fall Forecast (Octob

Forecast of Internati

Estimates in thousands

Rank Order 2017	Visitor Origin Country
	Grand Total
1	Canada
2	Mexico
	Overseas
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

Grand Total		76,94
1	Canada	20,21
2	Mexico	17,82
Overseas		**38,90**
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

2018 Fall Forecast (October 2018)

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

Estimates in thousands

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

		%			%			%			%			%			%		
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 ...ate

2018 Fall Forecast (October 2...

Change 23/17	% Change 23/17	CAGR 23/17
18,574	24%	3.7%
4,391	22%	3.3%
5,138	29%	4.3%
9,046	23%	3.5%
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%
81	18%	2.8%

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

Estimates in thousands

Rank Order 2017	Visitor Origin Country	Actual 2017	% Change 17/16	Forecast 2018	% Change 18/17	Forecast 2019	% Change 19/18	Forecast 2020	% Change 20/19	Forecast 2021	% Change 21/20	Forecast 2022	% Change 22/21	Forecast 2023	% Change 23/22	Change 23/17	% Change 23/17	CAGR 23/17
	Grand Total	**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%
	Overseas	**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%	5,298	3%	5,404	2%	921	21%	3.2%
4	Japan	3,596	-0%								1%	3,629	1%	3,702	2%	106	3%	0.5%
5	China	3,174	4%								5%	3,821	7%	4,127	8%	953	30%	4.5%
6	South Korea	2,335	18%								3%	2,705	3%	2,786	3%	451	19%	3.0%
7	Germany	2,080	2%								1%	2,252	1%	2,297	2%	217	10%	1.7%
8	Brazil	1,912	11%								3%	2,324	5%	2,463	6%	551	29%	4.3%
9	France	1,668	2%								3%	2,027	2%	2,067	2%	400	24%	3.6%
10	Australia	1,324	-2%								3%	1,519	5%	1,610	6%	287	22%	3.3%
11	India	1,285	7%								6%	1,768	6%	1,874	6%	589	46%	6.5%
12	Italy	1,032	4%								3%	1,196	2%	1,220	2%	188	18%	2.8%
13	Argentina	1,018	10%								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%

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

Zoom callout:

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

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

Estimates in thousands

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

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

Estimates in thousands

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

International Visitors to the U.S. and Projections
(2000-2023)

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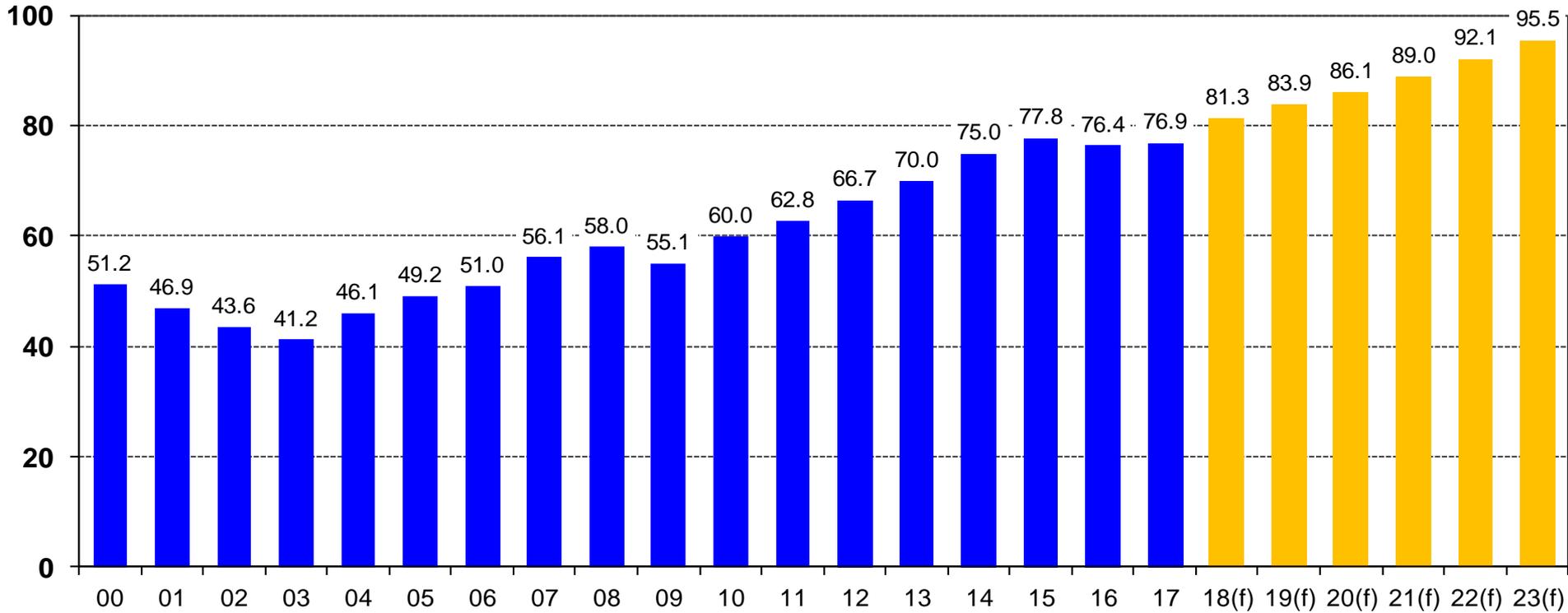
Sources: U.S. Department of Commerce, ITA, National Travel and Tourism Office; Secretaria de Turismo (Mexico); Statistics Canada. -- Fall 2018 Travel Forecast

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%; 2018: +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; Up 3.5% in 2018. Uneven performance across the top origin markets for both years. 2019 is off to a very uneven start. Overseas up, Canada and Mexico both down big.

- **USA Travel Exports**—2018 vs. 2017
  +1.7%   Total
  +1.8%   Receipts
  +5.9%   Education/Medical/Seasonal Workers
  +0.3%   Travel Spending (excluding E/M/S)
  +1.1%   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 the USA via air regardless of residence or purpose. The non-USA citizen count was consistently up 3.5% to 4.5% throughout 2018. Softer start to 2019. 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 on 12-month moving sum.

- **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**—FY18 (Oct-Sep) U.S. Dept. of State visa issuance down -9%... -21% over the past three FYs.

- **Miscellaneous**—gasoline after-tax 'windfall' versus several years ago continues. But not versus two years ago. A lower gasoline price benefits household finances world-wide.
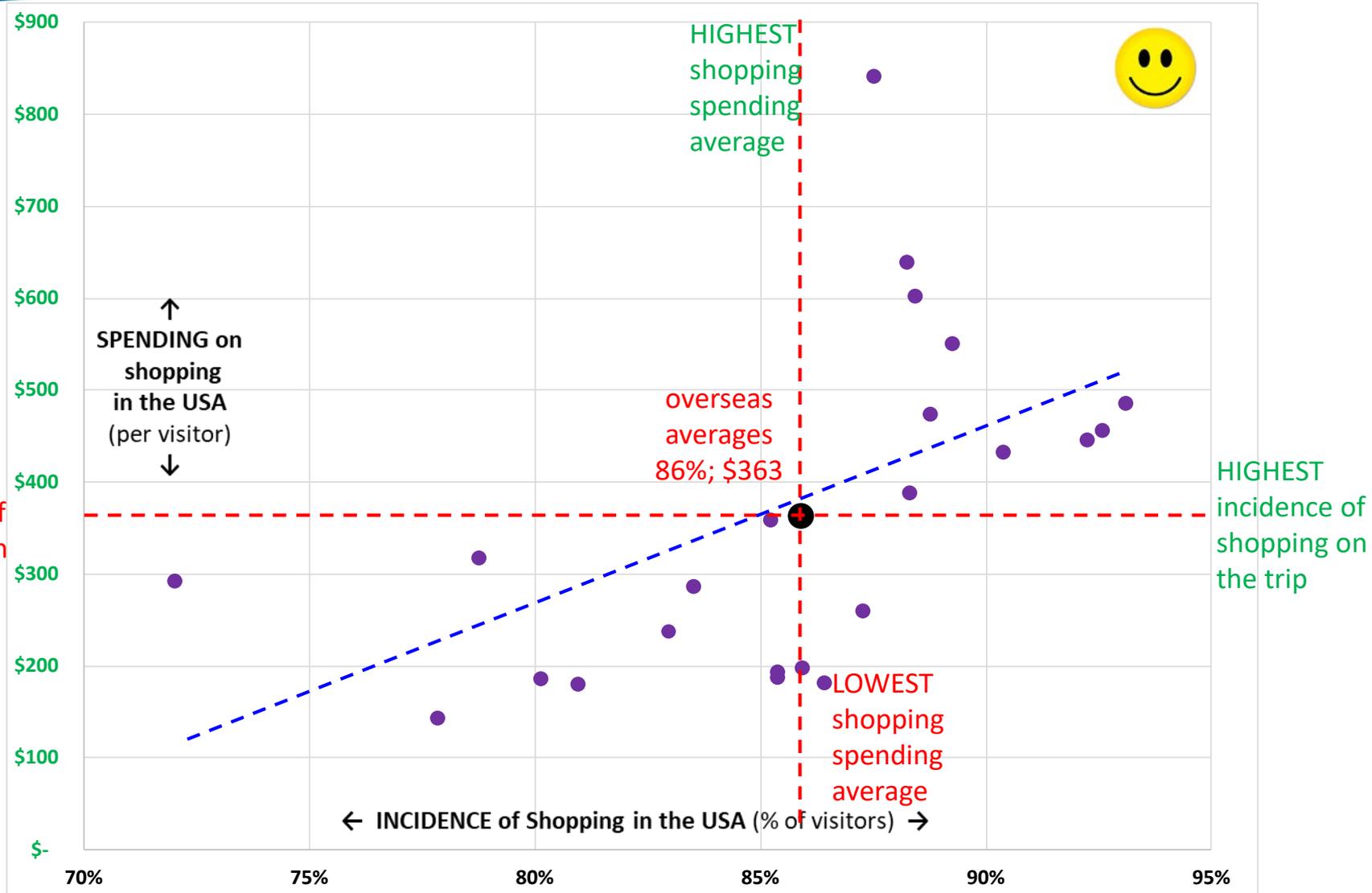
International Hotel-Motel Room Nights

(millions) assumes 1 room/party

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Overseas	**99**	**104**	**95**	**111**	**122**	**136**	**152**	**154**	**170**	**179**	**174**
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

Everybody SHOPS...but do they $SPEND?

incidence of shopping in the USA on trip vs. spending per visitor on shopping (3-year averages)

SPENDING on shopping in the USA (per visitor)
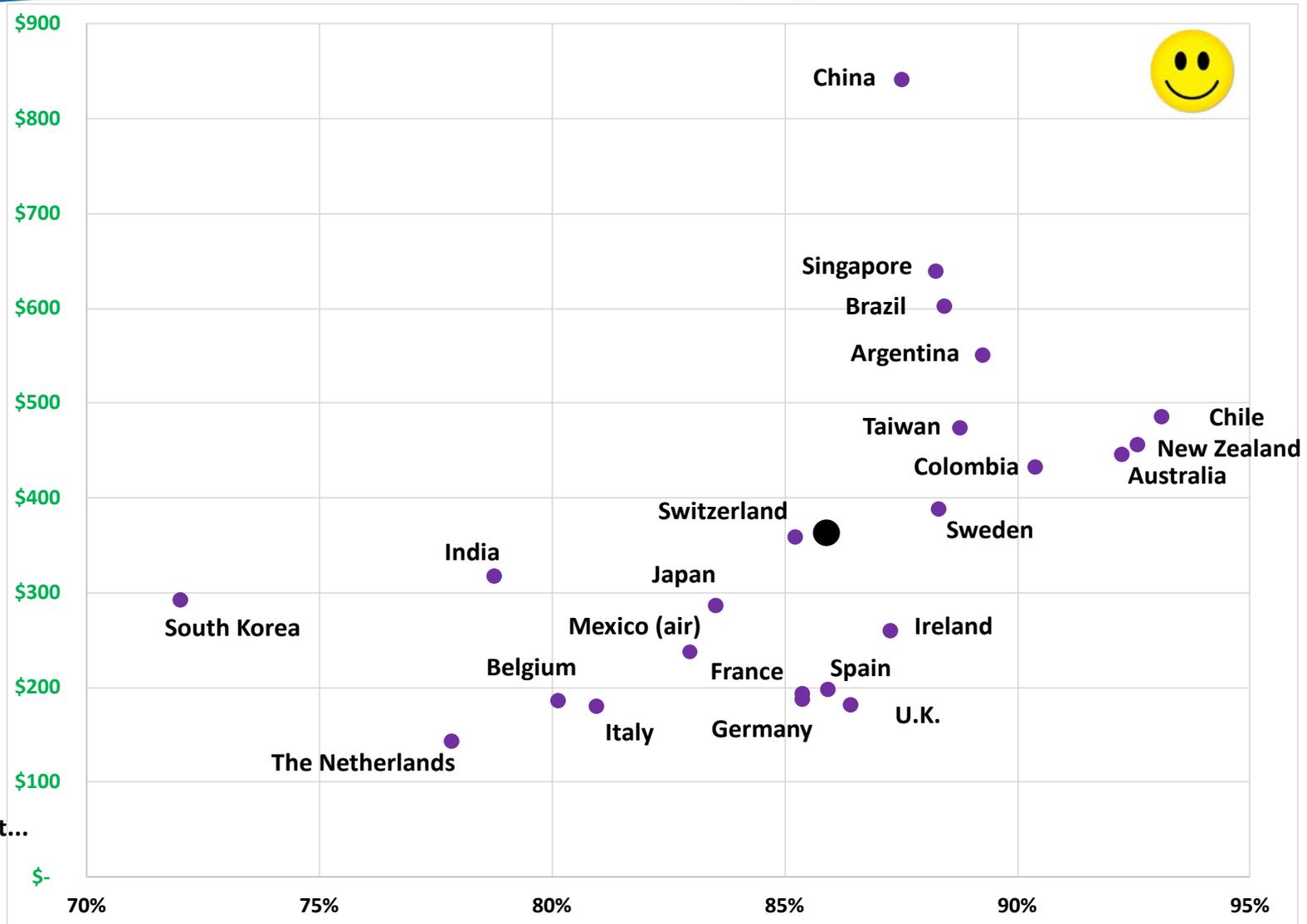
← INCIDENCE of Shopping in the USA (% of visitors) →

55%; $33

Everybody SHOPS...but do they *$PEND*?

incidence of shopping in the USA on trip vs. spending per visitor on shopping (3-year averages)

HIGHEST shopping spending average

SPENDING on shopping in the USA (per visitor)

LOWEST incidence of shopping on the trip

overseas averages 86%; $363

HIGHEST incidence of shopping on the trip

LOWEST shopping spending average

55%; $33

← INCIDENCE of Shopping in the USA (% of visitors) →

Everybody SHOPS...but do they *$PEND*?

incidence of shopping in the USA on trip vs. spending per visitor on shopping (3-year averages)

↑
SPENDING on shopping in the USA (per visitor)
↓

← **INCIDENCE of Shopping in the USA** (% of visitors) →

55%; $33

Everybody SHOPS...but do they *$PEND*?

incidence of shopping in the USA on trip vs. spending per visitor on shopping
(3-year averages)

China — ~85%, $840

Singapore — ~88%, $640
Brazil — ~88%, $605
Argentina — ~89%, $550

Chile — ~93%, $485
Taiwan — ~88%, $470
New Zealand — ~92%, $455
Colombia — ~91%, $430
Australia — ~92%, $445
Sweden — ~88%, $390
Switzerland — ~85%, $360
(black dot) — ~86%, $365
India — ~79%, $315
South Korea — ~72%, $290
Japan — ~80%, $285
Ireland — ~87%, $260
Mexico (air) — ~82%, $240
Belgium — ~80%, $185
Spain — ~86%, $200
France — ~85%, $190
U.K. — ~86%, $180
Germany — ~81%, $180
Italy — ~81%, $180
The Netherlands — ~78%, $145
Canada, but... — ~70%, $30

Y-axis: $- , $100, $200, $300, $400, $500, $600, $700, $800, $900

X-axis: 70%, 75%, 80%, 85%, 90%, 95%

*You **drive** for _____*

*But you **putt** for _____*

		Shopping Incidence (%)	Shopping Avg. $/V ($)	Shopping Avg. $/V/N ($)	Total Volume (millions)	Shopping Spending ($millions)
	All Overseas	**86**	**$ 363**	**$ 20**	**38.3**	**$13,901**
1	China	88	$ 841	$ 21	2.9	$ 2,450
2	Brazil	88	$ 603	$ 38	1.9	$ 1,171
3	Japan	84	$ 288	$ 40	3.6	$ 1,049
4	U.K.	86	$ 182	$ 13	4.7	$ 847
5	Canada	55	$ 33	$ 3	20.2	$ 665
6	Mexico (air)	83	$ 239	$ 21	2.6	$ 614
7	Australia	92	$ 447	$ 21	1.4	$ 613
8	South Korea	72	$ 293	$ 20	2.0	$ 594
9	Argentina	89	$ 551	$ 40	0.9	$ 499
10	Germany	85	$ 189	$ 10	2.1	$ 402
11	India	79	$ 318	$ 9	1.2	$ 379
12	Colombia	90	$ 434	$ 25	0.8	$ 366
13	France	85	$ 194	$ 12	1.7	$ 327
14	Taiwan	89	$ 474	$ 26	0.5	$ 218
15	Sweden	88	$ 389	$ 23	0.6	$ 216
16	Italy	81	$ 180	$ 13	1.0	$ 184
17	Switzerland	85	$ 360	$ 24	0.5	$ 174
18	Chile	93	$ 486	$ 35	0.3	$ 159
19	Spain	86	$ 199	$ 11	0.8	$ 158
20	New Zealand	93	$ 457	$ 22	0.3	$ 134
21	Ireland	87	$ 261	$ 18	0.5	$ 119
22	Netherlands	78	$ 144	$ 11	0.7	$ 101
23	Singapore	88	$ 640	$ 38	0.2	$ 98
24	Belgium	80	$ 187	$ 13	0.3	$ 59

*You **drive** for SHOW*

*But you **putt** for DOUGH*

		Shopping Incidence (%)	Shopping Avg. $/V ($)	Shopping Avg. $/V/N ($)	Total Volume (millions)	Shopping Spending ($millions)
	All Overseas	86	$ 363	$ 20	38.3	$13,901
1	China	88	$ 841	$ 21	2.9	$ 2,450
2	Brazil	88	$ 603	$ 38	1.9	$ 1,171
3	Japan	84	$ 288	$ 40	3.6	$ 1,049
4	U.K.	86	$ 182	$ 13	4.7	$ 847
5	Canada	55	$ 33	$ 3	20.2	$ 665
6	Mexico (air)	83	$ 239	$ 21	2.6	$ 614
7	Australia	92	$ 447	$ 21	1.4	$ 613
8	South Korea	72	$ 293	$ 20	2.0	$ 594
9	Argentina	89	$ 551	$ 40	0.9	$ 499
10	Germany	85	$ 189	$ 10	2.1	$ 402
11	India	79	$ 318	$ 9	1.2	$ 379
12	Colombia	90	$ 434	$ 25	0.8	$ 366
13	France	85	$ 194	$ 12	1.7	$ 327
14	Taiwan	89	$ 474	$ 26	0.5	$ 218
15	Sweden	88	$ 389	$ 23	0.6	$ 216
16	Italy	81	$ 180	$ 13	1.0	$ 184
17	Switzerland	85	$ 360	$ 24	0.5	$ 174
18	Chile	93	$ 486	$ 35	0.3	$ 159
19	Spain	86	$ 199	$ 11	0.8	$ 158
20	New Zealand	93	$ 457	$ 22	0.3	$ 134
21	Ireland	87	$ 261	$ 18	0.5	$ 119
22	Netherlands	78	$ 144	$ 11	0.7	$ 101
23	Singapore	88	$ 640	$ 38	0.2	$ 98
24	Belgium	80	$ 187	$ 13	0.3	$ 59

Which Shopping Metric Means the Most TO YOU?

country spending, incidence, average spend per visitor,
average spend per visitor per night, other

		Shopping Incidence (%)	Shopping Avg. $/V ($)	Shopping Avg. $/V/N ($)	Total Volume (millions)	Shopping Spending ($millions)
	All Overseas	**86**	**$ 363**	**$ 20**	**38.3**	**$13,901**
1	China	88	$ 841	$ 21	2.9	$ 2,450
2	Brazil	88	$ 603	$ 38	1.9	$ 1,171
3	Japan	84	$ 288	$ 40	3.6	$ 1,049
4	U.K.	86	$ 182	$ 13	4.7	$ 847
5	Canada	55	$ 33	$ 3	20.2	$ 665
6	Mexico (air)	83	$ 239	$ 21	2.6	$ 614
7	Australia	92	$ 447	$ 21	1.4	$ 613
8	South Korea	72	$ 293	$ 20	2.0	$ 594
9	Argentina	89	$ 551	$ 40	0.9	$ 499
10	Germany	85	$ 189	$ 10	2.1	$ 402
11	India	79	$ 318	$ 9	1.2	$ 379
12	Colombia	90	$ 434	$ 25	0.8	$ 366
13	France	85	$ 194	$ 12	1.7	$ 327
14	Taiwan	89	$ 474	$ 26	0.5	$ 218
15	Sweden	88	$ 389	$ 23	0.6	$ 216
16	Italy	81	$ 180	$ 13	1.0	$ 184
17	Switzerland	85	$ 360	$ 24	0.5	$ 174
18	Chile	93	$ 486	$ 35	0.3	$ 159
19	Spain	86	$ 199	$ 11	0.8	$ 158
20	New Zealand	93	$ 457	$ 22	0.3	$ 134
21	Ireland	87	$ 261	$ 18	0.5	$ 119
22	Netherlands	78	$ 144	$ 11	0.7	$ 101
23	Singapore	88	$ 640	$ 38	0.2	$ 98
24	Belgium	80	$ 187	$ 13	0.3	$ 59

Canada: based on different source, different survey, different definition of shopping; excludes 30M day visitors

Mexico: excludes 16M overnight visitors via land; exludes 66M day visitors

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 2018 to a record level, but country performances were uneven.

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 were often a combination of flat/lower overall volume, slightly lower incidence, slightly shorter hotel/motel stays.

5) Shopping metrics vary across countries. Which metric is 'best' depends on the perspective of who's asking...

How to Find Us

http://travel.trade.gov

Julie Heizer
National Travel & Tourism Office
U.S. Department of Commerce
Phone: 202 482 4904
julie.heizer@trade.gov

Find emails for each NTTO staff member at:
http://travel.trade.gov/about/overview.asp