

U.S. Department of Commerce
International Trade Administration



National Travel and Tourism Office

2013 Sector Profile: Lodging



2013 Industry Sector Profile: Lodging

Overseas Visitors Using Hotels/Motels

| [thousands of visitors] | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Change 2013/2006 |
|----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|---------------------|
| Overseas Visitors ⁽¹⁾ | 16,945 | 18,755 | 20,045 | 18,506 | 20,932 | 22,111 | 23,422 | 25,118 | 8,173 |
| % Change | 0 | 11 | 7 | -8 | 13 | 6 | 6 | 7 | 48 |
| Share of Overseas Visitors | 78.2 | 78.5 | 79.1 | 77.9 | 79.4 | 79.3 | 78.7 | 78.4 | |
| Point Change in Share | -0.1 | 0.3 | 0.6 | -1.2 | 1.5 | -0.1 | -0.6 | -0.3 | 0.2 |

Country of Origin of Visitors Using Hotels/Motels

| Visitor Origin | Market Share 2012 (Percent) | Volume 2012 (000) | Market Share 2013 (Percent) | Volume 2013 (000) |
|------------------|-----------------------------------|-------------------------|-----------------------------------|-------------------------|
| Regions | | | | |
| Europe | 44.1 | 10,329 | 41.5 | 10,424 |
| Asia | 29.8 | 6,980 | 30.0 | 7,535 |
| South America | 16.4 | 3,841 | 17.6 | 4,421 |
| Oceania | 5.0 | 1,171 | 5.4 | 1,356 |
| Middle East | 1.8 | 422 | 2.2 | 553 |
| Africa | 0.6 | 141 | 0.7 | 176 |
| Countries | | | | |
| Japan | 17.3 | 4,052 | 16.9 | 4,245 |
| United Kingdom | 14.9 | 3,490 | 14.0 | 3,517 |
| Brazil | 7.8 | 1,827 | 8.6 | 2,160 |
| Germany | 6.8 | 1,593 | 6.2 | 1,557 |
| France | 5.0 | 1,171 | 4.9 | 1,231 |
| Australia | 4.3 | 1,007 | 4.7 | 1,181 |
| Korea, South | 4.2 | 984 | 4.6 | 1,155 |
| China | 3.6 | 843 | 3.7 | 929 |
| Italy | 2.9 | 679 | 2.8 | 703 |
| Argentina | 2.8 | 656 | 2.7 | 678 |
| Netherlands | 2.2 | 515 | 2.0 | 502 |
| Spain | 2.3 | 539 | 1.8 | 452 |
| India | 1.4 | 328 | 1.7 | 427 |
| Switzerland | 1.8 | 422 | 1.7 | 427 |
| Singapore | 0.7 | 164 | 0.6 | 151 |
| Taiwan | 0.9 | 211 | ** | ** |

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Information Sources Used to Plan Trip by Those Using Hotel/Motels

| Information Sources Used (multiple response: top 6 of 9) | 2012 (Percent) | 2013 (Percent) | Point Change (2) |
|---|-------------------|-------------------|---------------------|
| Airlines | 41 | 41 | 0.3 |
| Online Travel Agency | 31 | 31 | 0.7 |
| Travel Agency Office | 27 | 26 | -1.2 |
| Personal Recommendation | 24 | 24 | 0.2 |
| Travel Guides | 15 | 15 | -0.5 |
| Corporate Travel Dept. | 14 | 15 | 0.5 |

Main Purpose of Trip

| Main Purpose of Trip (top 4 of 8) | 2012 (Percent) | 2013 (Percent) | Point Change (2) |
|--------------------------------------|-------------------|-------------------|---------------------|
| Vacation/Holiday | 64 | 64 | 0.3 |
| Business | 14 | 14 | -0.6 |
| Convention/Conference/Trade Show | 9 | 9 | -0.1 |
| Visit Friends/Relatives | 8 | 8 | -0.1 |

All Purposes of Trip

| Purpose of Trip (multiple response--top 4 of 8) | 2012 (Percent) | 2013 (Percent) | Point Change (2) |
|--|-------------------|-------------------|---------------------|
| Vacation/Holiday | 72 | 71 | -0.6 |
| Visit Friends/Relatives | 19 | 18 | -0.9 |
| Business | 18 | 18 | 0.3 |
| Convention/Conference/Trade Show | 12 | 12 | -0.2 |
| | | | |
| NET PURPOSES OF TRIP: | | | |
| Leisure & VFR | 78 | 77 | -0.5 |
| Business & Convention | 27 | 26 | -0.2 |

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Transportation Used in United States by Those Using Hotel/Motels

| Transportation Types Used in United States (multiple response--top 6 of 11) | 2012 (Percent) | 2013 (Percent) | Point Change (2) |
|--|-------------------|-------------------|---------------------|
| Taxicab/Limousine | 40 | 39 | -0.3 |
| Rented Auto | 38 | 38 | 0.5 |
| Air Travel between U.S. Cities | 35 | 35 | -0.1 |
| City Subway/Tram/Bus | 34 | 34 | -0.2 |
| Auto, Private or Company | 26 | 26 | -0.9 |
| Bus between Cities | 18 | 18 | 0.3 |

Activity Participation While in the United States

| Activity Participation While in the U.S. (multiple response--top 10 of 22) | 2012 (Percent) | 2013 (Percent) | Point Change (2) |
|---|-------------------|-------------------|---------------------|
| Shopping | 89 | 89 | 0.2 |
| Sightseeing | 79 | 80 | 0.2 |
| Experience Fine Dining | 39 | 40 | 0.8 |
| National Parks/Monuments | 35 | 34 | -0.4 |
| Amusement/Theme Parks | 28 | 28 | 0.5 |
| Art Gallery/Museum | 29 | 28 | -0.2 |
| Historical Locations | 28 | 28 | 0.2 |
| Guided Tours | 28 | 27 | -1.1 |
| Small Towns/Countryside | 26 | 25 | -1.1 |
| Concert/Play/Musical | 19 | 18 | -1.0 |

2013 Industry Sector Profile: Lodging

Select Traveler Characteristics of Those Using Hotel/Motels

| Traveler Characteristics | 2012 | 2013 | Change (2) |
|--|-----------|-----------|------------|
| Advance Trip Decision Time (mean days) | 97 | 102 | 5.0 |
| Advance Trip Decision Time (median days) | 60 | 70 | 10.0 |
| Prepaid Package | 24 | 23 | -1.1 |
| First International Trip to the U.S. | 24 | 24 | 0.0 |
| Length of Stay in U.S. (mean nights) | 13.4 | 13.6 | 0.2 |
| Length of Stay in U.S. (median nights) | 8 | 8 | 0.0 |
| Number of States Visited (% 1 state) | 66 | 68 | 1.3 |
| Average Number of States Visited | 1.5 | 1.5 | 0.0 |
| Hotel/Motel (% 1+ nights) | 100 | 100 | 0.0 |
| Average # of Nights in Hotel/Motel | 9.3 | 9.7 | 0.4 |
| Travel Party Size (mean # of persons) | 1.8 | 1.7 | -0.1 |
| Gender: % Male (among adults) | 59 | 59 | -0.5 |
| Household Income (mean average) | \$107,620 | \$102,149 | -\$5,471 |
| Household Income (median average) | \$80,000 | \$77,376 | -\$2,624 |
| Average Age: Female (among adults) | 38 | 38 | 0.1 |
| Average Age: Male (among adults) | 42 | 41 | -0.1 |



2013 Industry Sector Profile: Lodging

U.S. Destinations Visited by Overseas Travelers Using Hotels/Motels

| Visitation to U.S. Destinations/Regions (3) | Market Share 2012 (Percent) | Volume 2012 (000) | Market Share 2013 (Percent) | Volume 2013 (000) |
|---|-----------------------------|-------------------|-----------------------------|-------------------|
| Regions | | | | |
| Middle Atlantic | 33.2 | 7,776 | 32.2 | 8,088 |
| South Atlantic | 32.0 | 7,495 | 32.1 | 8,063 |
| Pacific | 22.8 | 5,340 | 22.7 | 5,702 |
| Pacific Islands | 17.6 | 4,122 | 18.3 | 4,597 |
| Mountain | 14.6 | 3,420 | 14.1 | 3,542 |
| East North Central | 7.1 | 1,663 | 6.7 | 1,683 |
| West South Central | 5.3 | 1,241 | 5.8 | 1,457 |
| New England | 5.4 | 1,265 | 5.3 | 1,331 |
| West North Central | 2.0 | 468 | 1.8 | 452 |
| East South Central | 1.6 | 375 | 1.4 | 352 |
| States | | | | |
| New York | 30.7 | 7,191 | 29.5 | 7,410 |
| Florida | 23.3 | 5,457 | 23.9 | 6,003 |
| California | 21.5 | 5,036 | 21.3 | 5,350 |
| Hawaii | 12.5 | 2,928 | 13.0 | 3,265 |
| Nevada | 11.9 | 2,787 | 11.6 | 2,914 |
| Guam | 5.2 | 1,218 | 5.4 | 1,356 |
| Illinois | 5.0 | 1,171 | 4.6 | 1,155 |
| Texas | 4.0 | 937 | 4.5 | 1,130 |
| Massachusetts | 4.7 | 1,101 | 4.4 | 1,105 |
| Arizona | 3.3 | 773 | 3.1 | 779 |
| Pennsylvania | 3.2 | 750 | 3.0 | 754 |
| New Jersey | 2.5 | 586 | 2.6 | 653 |
| Georgia | 2.3 | 539 | 2.3 | 578 |
| Washington | 1.6 | 375 | ** | ** |

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2013 Industry Sector Profile: Lodging

U.S. Destinations Visited by Overseas Travelers Using Hotels/Motels

| Visitation to U.S. Destinations/Regions (3) | Market Share 2012 (Percent) | Volume 2012 (000) | Market Share 2013 (Percent) | Volume 2013 (000) |
|---|-----------------------------|-------------------|-----------------------------|-------------------|
| Cities | | | | |
| New York City | 30.1 | 7,050 | 28.9 | 7,259 |
| Orlando | 12.7 | 2,975 | 14.2 | 3,567 |
| Miami | 12.8 | 2,998 | 14.0 | 3,517 |
| Los Angeles | 12.7 | 2,975 | 12.8 | 3,215 |
| Las Vegas | 11.6 | 2,717 | 11.4 | 2,863 |
| Honolulu Oahu | 10.2 | 2,389 | 10.9 | 2,738 |
| San Francisco | 10.5 | 2,459 | 10.9 | 2,738 |
| Washington, D.C. | 6.4 | 1,499 | 5.8 | 1,457 |
| Chicago | 4.8 | 1,124 | 4.4 | 1,105 |
| Boston | 4.4 | 1,031 | 4.0 | 1,005 |
| San Diego | 3.0 | 703 | 3.0 | 754 |
| Houston | 1.9 | 445 | 2.3 | 578 |
| Flagstaff/Grand Canyon/Sedona | 2.3 | 539 | 2.2 | 553 |
| Atlanta | 1.9 | 445 | 2.0 | 502 |
| Philadelphia | 2.2 | 515 | 2.0 | 502 |
| San Jose | 1.5 | 351 | ** | ** |

(1) Excludes Canada and Mexico.

(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.

This profile shows only a portion of the 37 travel characteristics data reported on international arrivals to the U.S. 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

Interested in data for your destination? 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

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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 overseas traveler who used lodging while visiting the United States.

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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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