

U.S. Department of Commerce
International Trade Administration



National Travel and Tourism Office

2014 Sector Profile: Leisure



2014 Industry Sector Profile: Leisure

Overseas Leisure Visitors

| [thousands of visitors] | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | Change 2014/2007 |
|----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|---------------------|
| Overseas Visitors ⁽¹⁾ | 14,192 | 16,092 | 15,560 | 17,900 | 18,849 | 19,970 | 21,370 | 23,474 | 9,282 |
| % Change | 8 | 13 | -3 | 15 | 5 | 6 | 7 | 10 | 65 |
| Share of Overseas Visitors | 59.4 | 63.5 | 65.5 | 67.9 | 67.6 | 67.1 | 66.7 | 68.2 | |
| Point Change in Share | -1.5 | 4.1 | 2.0 | 2.4 | -0.3 | -0.5 | -0.4 | 1.5 | 8.8 |

Country of Origin of Leisure Visitors

| Visitor Origin | Market Share 2013 (Percent) | Volume 2013 (000) | Market Share 2014 (Percent) | Volume 2014 (000) |
|------------------|-----------------------------------|-------------------------|-----------------------------------|-------------------------|
| Europe | 43.1 | 9,210 | 42.7 | 10,023 |
| Asia | 25.4 | 5,428 | 24.2 | 5,681 |
| South America | 19.6 | 4,189 | 19.8 | 4,648 |
| Oceania | 5.7 | 1,218 | 5.7 | 1,338 |
| Central America | ** | ** | 2.4 | 563 |
| Caribbean | ** | ** | 2.3 | 540 |
| Middle East | 2.2 | 470 | 2.2 | 516 |
| Africa | ** | ** | 0.8 | 188 |
| Countries | | | | |
| United Kingdom | 14.4 | 3,077 | 13.9 | 3,263 |
| Japan | 14.0 | 2,992 | 11.9 | 2,793 |
| Brazil | 8.7 | 1,859 | 8.7 | 2,042 |
| Germany | 6.3 | 1,346 | 6.1 | 1,432 |
| France | 5.3 | 1,133 | 5.1 | 1,197 |
| Australia | 4.9 | 1,047 | 4.8 | 1,127 |
| China | 3.7 | 791 | 4.4 | 1,033 |
| Korea, South | 4.2 | 898 | 4.2 | 986 |
| Italy | 3.0 | 641 | 3.1 | 728 |
| Colombia | ** | ** | 2.9 | 681 |
| Argentina | 2.9 | 620 | 2.7 | 634 |
| Spain | 2.1 | 449 | 2.2 | 516 |
| Sweden | ** | ** | 1.7 | 399 |
| Switzerland | 1.8 | 385 | 1.6 | 376 |
| Chile | ** | ** | 0.9 | 211 |
| Taiwan | ** | ** | 0.8 | 188 |
| Netherlands | 2.0 | 427 | ** | ** |

2014 Industry Sector Profile: Leisure

Main Purpose of Trip

| Main Purpose of Trip | 2013 (Percent) | 2014 (Percent) | Point Change ⁽²⁾ |
|----------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday | 85 | 85 | 0.1 |
| Visit Friends/Relatives | 9 | 9 | 0.0 |
| Convention/Conference/Trade Show | 2 | 2 | -0.1 |
| Education | 2 | 2 | 0.1 |
| Business | 2 | 2 | 0.1 |
| Health Treatment | 0.2 | 0.1 | -0.1 |
| Religion/Pilgrimages | 0.1 | 0.1 | 0.0 |
| Other | 0.3 | 0.2 | -0.1 |

All Purposes of Trip

| Purpose of Trip (multiple responses) | 2013 (Percent) | 2014 (Percent) | Point Change ⁽²⁾ |
|--------------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday | 100 | 100 | 0.0 |
| Visit Friends/Relatives | 24 | 25 | 0.7 |
| Education | 4 | 4 | 0.0 |
| Business | 3 | 4 | 0.2 |
| Convention/Conference/Trade Show | 3 | 3 | 0.1 |
| Religion/Pilgrimages | 1 | 1 | 0.1 |
| Health Treatment | 0.4 | 0.5 | 0.1 |
| Other | 1 | 1 | -0.4 |
| | | | |
| NET PURPOSES OF TRIP: | | | |
| Leisure & VFR | 100 | 100 | 0.0 |
| Business & Convention | 6 | 7 | 0.4 |

2014 Industry Sector Profile: Leisure

Information Sources Used to Plan Trip by Leisure Visitors

| Information Sources Used (multiple responses) | 2013 (Percent) | 2014 (Percent) | Point Change (2) |
|---|----------------|----------------|------------------|
| Airlines | 44 | 44 | -0.1 |
| Online Travel Agency | 35 | 36 | 1.8 |
| Personal Recommendation | 28 | 29 | 1.1 |
| Travel Agency Office | 25 | 24 | -1.4 |
| Travel Guides | 16 | 16 | -0.2 |
| National/State/City Travel Office | 11 | 11 | -0.5 |
| Tour Operator/Travel Club | 11 | 10 | -0.5 |
| Corporate Travel Dept. | 7 | 7 | -0.2 |
| Other | 5 | 6 | 0.4 |

Transportation Used in United States by Leisure Visitors

| Transportation Types Used in United States (multiple responses) | 2013 (Percent) | 2014 (Percent) | Point Change (2) |
|---|----------------|----------------|------------------|
| Rented Auto | 38 | 40 | 2.0 |
| City Subway/Tram/Bus | 36 | 34 | -2.2 |
| Taxicab/Limousine | 34 | 33 | -1.3 |
| Auto, Private or Company | 28 | 28 | 0.5 |
| Air Travel between U.S. Cities | 31 | 28 | -2.6 |
| Bus between Cities | 21 | 20 | -0.5 |
| Ferry/River Taxi/Srt Scenic Cruise | 13 | 12 | -0.7 |
| Railroad between Cities | 7 | 7 | 0.0 |
| Cruise Ship/River Boat 1+ Nights | 5 | 6 | 0.7 |
| Rented Bicycle/Motorcycle/Moped | 4 | 3 | -0.1 |
| Motor Home/Camper | 1 | 1 | 0.0 |

2014 Industry Sector Profile: Leisure

Activity Participation While in the United States

| Activity Participation While in the U.S. (multiple responses) | 2013 (Percent) | 2014 (Percent) | Point Change ⁽²⁾ |
|--|-------------------|-------------------|--------------------------------|
| Shopping | 91 | 91 | -0.1 |
| Sightseeing | 84 | 83 | -0.6 |
| Experience Fine Dining | 40 | 40 | -0.6 |
| National Parks/Monuments | 38 | 39 | 0.3 |
| Amusement/Theme Parks | 33 | 34 | 1.7 |
| Historical Locations | 30 | 30 | -0.3 |
| Small Towns/Countryside | 29 | 30 | 0.7 |
| Art Gallery/Museum | 31 | 29 | -1.2 |
| Guided Tours | 29 | 28 | -1.0 |
| Concert/Play/Musical | 20 | 19 | -1.0 |
| Cultural / Ethnic Heritage Sites | 18 | 17 | -0.8 |
| Nightclubbing/Dancing | 16 | 16 | -0.3 |
| Sporting Event | 13 | 14 | 0.7 |
| Water Sports | 12 | 12 | 0.1 |
| Casinos/Gamble | 11 | 11 | -0.7 |
| Camping/Hiking | 5 | 5 | 0.9 |
| American Indian Communities | 5 | 5 | 0.0 |
| Environ./Eco. Excursions | 4 | 4 | 0.4 |
| Golfing/Tennis | 4 | 4 | -0.2 |
| Hunting/Fishing | 2 | 2 | 0.4 |
| Snow Sports | 2 | 2 | -0.1 |
| Other | 2 | 1 | -0.2 |



2014 Industry Sector Profile: Leisure

Select Traveler Characteristics of Leisure Visitors

| Traveler Characteristics | 2013 | 2014 | Change (2) |
|--|----------|----------|------------|
| Advance Trip Decision Time (mean days) | 112 | 115 | 2.9 |
| Advance Trip Decision Time (median days) | 90 | 90 | 0.0 |
| Prepaid Package | 23 | 21 | -1.7 |
| First International Trip to the U.S. | 27 | 27 | -0.4 |
| Length of Stay in U.S. (mean nights) | 14.4 | 15.0 | 0.6 |
| Length of Stay in U.S. (median nights) | 10 | 10 | 0.0 |
| Number of States Visited (% 1 state) | 70 | 70 | -0.1 |
| Average Number of States Visited | 1.5 | 1.5 | 0.0 |
| Hotel/Motel (% 1+ nights) | 82 | 81 | -0.3 |
| Average # of Nights in Hotel/Motel | 9.0 | 9.2 | 0.2 |
| Travel Party Size (mean # of persons) | 1.9 | 2.0 | 0.1 |
| Gender: % Male (among adults) | 49 | 48 | -0.9 |
| Household Income (mean average) | \$92,287 | \$87,343 | -\$4,944 |
| Household Income (median average) | \$67,080 | \$65,166 | -\$1,914 |
| Average Age: Female (among adults) | 38 | 37 | -0.1 |
| Average Age: Male (among adults) | 40 | 40 | 0.5 |



2014 Industry Sector Profile: Leisure

U.S. Destinations Visited by Overseas Leisure Visitors

| Visitation to U.S. Destinations/Regions (3) | Market Share 2013 (Percent) | Volume 2013 (000) | Market Share 2014 (Percent) | Volume 2014 (000) |
|---|-----------------------------|-------------------|-----------------------------|-------------------|
| Regions | | | | |
| South Atlantic | 33.8 | 7,223 | 37.1 | 8,709 |
| Middle Atlantic | 34.9 | 7,458 | 33.2 | 7,793 |
| Pacific | 20.6 | 4,402 | 21.1 | 4,953 |
| Pacific Islands | 19.2 | 4,103 | 16.5 | 3,873 |
| Mountain | 13.8 | 2,949 | 13.3 | 3,122 |
| New England | 4.6 | 983 | 4.8 | 1,127 |
| East North Central | 4.1 | 876 | 4.2 | 986 |
| West South Central | 4.2 | 898 | 4.1 | 962 |
| States | | | | |
| New York | 33.1 | 7,073 | 31.5 | 7,394 |
| Florida | 27.5 | 5,877 | 29.9 | 7,019 |
| California | 19.4 | 4,146 | 20.0 | 4,695 |
| Hawaii | 13.1 | 2,799 | 11.6 | 2,723 |
| Nevada | 11.5 | 2,458 | 11.1 | 2,606 |
| Guam | 6.2 | 1,325 | 4.9 | 1,150 |
| Massachusetts | 3.9 | 833 | 4.0 | 939 |
| Arizona | 3.0 | 641 | 3.2 | 751 |
| Texas | 3.2 | 684 | 3.0 | 704 |
| Illinois | 3.0 | 641 | 2.9 | 681 |
| Pennsylvania | 2.4 | 513 | 2.5 | 587 |
| New Jersey | 2.1 | 449 | 2.2 | 516 |
| Georgia | ** | ** | 2.0 | 469 |
| Utah | ** | ** | 1.9 | 446 |

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2014 Industry Sector Profile: Leisure

U.S. Destinations Visited by Overseas Leisure Visitors

| Visitation to U.S. Destinations/Regions (3) | Market Share 2013 (Percent) | Volume 2013 (000) | Market Share 2014 (Percent) | Volume 2014 (000) |
|---|-----------------------------|-------------------|-----------------------------|-------------------|
| Cities | | | | |
| New York City | 32.7 | 6,988 | 31.0 | 7,277 |
| Miami | 15.3 | 3,270 | 16.9 | 3,967 |
| Orlando | 15.7 | 3,355 | 16.0 | 3,756 |
| Los Angeles | 12.9 | 2,757 | 13.7 | 3,216 |
| Las Vegas | 11.2 | 2,393 | 10.8 | 2,535 |
| San Francisco | 10.4 | 2,222 | 9.8 | 2,300 |
| Honolulu Oahu | 10.8 | 2,308 | 9.5 | 2,230 |
| Washington, D.C. | 5.0 | 1,069 | 5.6 | 1,315 |
| Boston | 3.6 | 769 | 3.7 | 869 |
| San Diego | 2.7 | 577 | 3.3 | 775 |
| Chicago | 2.9 | 620 | 2.8 | 657 |
| Ft. Lauderdale | ** | ** | 2.8 | 657 |
| Flagstaff/Grand Canyon/Sedona | 2.3 | 492 | 2.4 | 563 |
| Florida Keys | ** | ** | 2.0 | 469 |
| Tampa-St. Petersburg | ** | ** | 2.0 | 469 |
| Anaheim-Santa Ana | ** | ** | 1.8 | 423 |
| Philadelphia | 1.7 | 363 | 1.7 | 399 |
| Houston | ** | ** | 1.5 | 352 |

(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 leisure traveler who visits 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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