

U.S. Department of Commerce
International Trade Administration



National Travel and Tourism Office

2015 Sector Profile: Lodging



2015 Industry Sector Profile: Lodging

Overseas Visitors Using Hotels/Motels

| [thousands of visitors] | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 ^r | 2015 ¹ | Change 2015/2008 |
|----------------------------------|--------|--------|--------|--------|--------|--------|-------------------|-------------------|---------------------|
| Overseas Visitors ⁽²⁾ | 20,045 | 18,506 | 20,932 | 22,111 | 23,422 | 25,118 | 26,937 | 29,024 | 8,979 |
| % Change | 7 | -8 | 13 | 6 | 6 | 7 | 7 | 9 | 45 |
| Share of Overseas Visitors | 79.1 | 77.9 | 79.4 | 79.3 | 78.7 | 78.4 | 77.1 | 75.6 | |
| Point Change in Share | 1 | -1 | 2 | 0 | -1 | 0 | -1 | -2 | -4 |

Country of Origin of Visitors Using Hotels/Motels

| Visitor Origin | Market Share 2014 (Percent) | Volume 2014 ^r (000) | Market Share 2015 (Percent) | Volume 2015 ¹ (000) |
|------------------|-----------------------------------|--------------------------------------|-----------------------------------|--------------------------------------|
| Regions | | | | |
| Europe | 41.3 | 11,125 | 43.1 | 12,509 |
| Asia | 29.2 | 7,866 | 29.3 | 8,504 |
| South America | 18.0 | 4,849 | 16.0 | 4,644 |
| Oceania | 5.5 | 1,482 | 5.5 | 1,596 |
| Middle East | 2.1 | 566 | 2.1 | 610 |
| Central America | 1.7 | 458 | 1.9 | 551 |
| Africa | 0.8 | 215 | 0.8 | 232 |
| Countries | | | | |
| United Kingdom | 13.3 | 3,583 | 15.5 | 4,499 |
| Japan | 14.9 | 4,014 | 13.8 | 4,005 |
| Brazil | 8.5 | 2,290 | 7.2 | 2,090 |
| Germany | 6.2 | 1,670 | 6.2 | 1,799 |
| Korea, South | 4.5 | 1,212 | 5.2 | 1,509 |
| P. R. of China | 4.7 | 1,266 | 5.0 | 1,451 |
| France | 5.1 | 1,374 | 4.7 | 1,364 |
| Australia | 4.6 | 1,239 | 4.5 | 1,306 |
| Italy | 2.8 | 754 | 2.9 | 842 |
| Argentina | 2.6 | 700 | 2.7 | 784 |
| Colombia | 2.4 | 646 | 2.1 | 610 |
| India | 2.0 | 539 | 2.1 | 610 |
| Netherlands | ** | ** | 2.0 | 580 |
| Spain | 2.0 | 539 | 2.0 | 580 |
| Sweden | 1.8 | 485 | 1.8 | 522 |
| Switzerland | ** | ** | 1.6 | 464 |
| Taiwan | 1.0 | 269 | 1.1 | 319 |

2015 Industry Sector Profile: Lodging

Main Purpose of Trip

| Main Purpose of Trip | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|----------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday | 66 | 65 | -0.5 |
| Business | 13 | 14 | 0.5 |
| Convention/Conference/Trade Show | 8 | 9 | 0.8 |
| Visit Friends/Relatives | 9 | 8 | -0.2 |
| Education | 3 | 3 | -0.2 |
| Health Treatment | 0.2 | 0.3 | 0.1 |
| Religion/Pilgrimages | 0.2 | 0.1 | -0.1 |
| Other | 1 | 0.3 | -0.4 |

All Purposes of Trip

| Purpose of Trip (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|--------------------------------------|-------------------|-------------------|--------------------------------|
| Vacation/Holiday | 74 | 73 | -0.5 |
| Visit Friends/Relatives | 20 | 20 | -0.1 |
| Business | 17 | 17 | 0.3 |
| Convention/Conference/Trade Show | 11 | 12 | 0.9 |
| Education | 5 | 5 | 0.1 |
| Health Treatment | 1 | 1 | 0.0 |
| Religion/Pilgrimages | 1 | 1 | -0.1 |
| Other | 1 | 0 | -0.7 |
| | | | |
| NET PURPOSES OF TRIP: | | | |
| Leisure & VFR | 80 | 79 | -1.0 |
| Business & Convention | 25 | 26 | 1.2 |

2015 Industry Sector Profile: Lodging

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

| Information Sources Used (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|---|-------------------|-------------------|--------------------------------|
| Airlines | 42 | 43 | 1.5 |
| Online Travel Agency | 34 | 33 | -1.0 |
| Personal Recommendation | 25 | 25 | 0.2 |
| Travel Agency Office | 25 | 23 | -1.7 |
| Travel Guides | 15 | 14 | -0.8 |
| Corporate Travel Dept. | 13 | 13 | -0.1 |
| Tour Operator/Travel Club | 9 | 9 | -0.6 |
| National/State/City Travel Office | 10 | 8 | -1.5 |
| Other | 6 | 5 | -0.4 |

Transportation Used in United States by Those Using Hotel/Motels

| Transportation Types Used in United States (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|--|-------------------|-------------------|--------------------------------|
| Rented Auto | 41 | 41 | 0.1 |
| Taxicab/Limousine | 38 | 38 | -0.3 |
| City Subway/Tram/Bus | 32 | 33 | 0.4 |
| Air Travel between U.S. Cities | 31 | 30 | -0.8 |
| Auto, Private or Company | 26 | 26 | 0.4 |
| Bus between Cities | 18 | 17 | -1.2 |
| Ferry/River Taxi/Srt Scenic Cruise | 11 | 11 | 0.2 |
| Railroad between Cities | 6 | 6 | 0.2 |
| Cruise Ship/River Boat 1+ Nights | 5 | 5 | 0.0 |
| Rented Bicycle/Motorcycle/Moped | 3 | 4 | 0.5 |
| Motor Home/Camper | 1 | 1 | 0.2 |

2015 Industry Sector Profile: Lodging

Activity Participation While in the United States

| Activity Participation While in the U.S. (multiple responses) | 2014 (Percent) | 2015 (Percent) | Point Change ⁽³⁾ |
|--|-------------------|-------------------|--------------------------------|
| Shopping | 89 | 88 | -1.5 |
| Sightseeing | 80 | 80 | 0.6 |
| Experience Fine Dining | 40 | 38 | -1.4 |
| National Parks/Monuments | 35 | 36 | 1.0 |
| Amusement/Theme Parks | 31 | 30 | -0.6 |
| Art Gallery/Museum | 28 | 29 | 1.1 |
| Historical Locations | 28 | 28 | 0.4 |
| Small Towns/Countryside | 27 | 27 | 0.1 |
| Guided Tours | 27 | 26 | -0.8 |
| Concert/Play/Musical | 18 | 17 | -1.4 |
| Cultural / Ethnic Heritage Sites | 16 | 16 | 0.7 |
| Nightclubbing/Dancing | 15 | 14 | -0.9 |
| Sporting Event | 13 | 13 | 0.2 |
| Water Sports | 11 | 11 | -0.2 |
| Casinos/Gamble | 10 | 10 | 0.1 |
| American Indian Communities | 5 | 5 | 0.4 |
| Camping/Hiking | 5 | 4 | -0.2 |
| Environ./Eco. Excursions | 3 | 4 | 0.2 |
| Golfing/Tennis | 3 | 3 | -0.4 |
| Hunting/Fishing | 2 | 1 | -0.2 |
| Snow Sports | 1 | 1 | -0.1 |
| Other | 1 | 1 | -0.1 |



2015 Industry Sector Profile: Lodging

Select Traveler Characteristics of Those Using Hotel/Motels

| Traveler Characteristics | 2014 | 2015 | Change (3) |
|--|----------|----------|------------|
| Advance Trip Decision Time (mean days) | 105 | 109 | 3.6 |
| Advance Trip Decision Time (median days) | 80 | 90 | 10.0 |
| Prepaid Package | 21 | 20 | -1.3 |
| First International Trip to the U.S. | 24 | 24 | 0.6 |
| Length of Stay in U.S. (mean nights) | 14.0 | 14.1 | 0.1 |
| Length of Stay in U.S. (median nights) | 8 | 8 | 0.0 |
| Number of States Visited (% 1 state) | 68 | 69 | 0.4 |
| Average Number of States Visited | 1.6 | 1.6 | 0.0 |
| Hotel/Motel (% 1+ nights) | 100 | 100 | 0.0 |
| Average # of Nights in Hotel/Motel | 9.7 | 9.9 | 0.2 |
| Travel Party Size (mean # of persons) | 1.8 | 1.8 | 0.0 |
| Gender: % Male (among adults) | 57 | 58 | 0.7 |
| Household Income (mean average) | \$96,735 | \$89,375 | -\$7,360 |
| Household Income (median average) | \$73,200 | \$68,295 | -\$4,905 |
| Average Age: Female (among adults) | 38 | 38 | -0.1 |
| Average Age: Male (among adults) | 41 | 41 | 0.2 |



2015 Industry Sector Profile: Lodging

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

| Visitation to U.S. Destinations/Regions (4) | Market Share 2014 (Percent) | Volume 2014 ^r (000) | Market Share 2015 (Percent) | Volume 2015 ¹ (000) |
|---|-----------------------------|--------------------------------|-----------------------------|--------------------------------|
| Regions | | | | |
| South Atlantic | 35.20 | 9,482 | 35.23 | 10,225 |
| Middle Atlantic | 30.27 | 8,154 | 28.64 | 8,312 |
| Pacific | 22.99 | 6,193 | 23.80 | 6,908 |
| Pacific Islands | 16.11 | 4,340 | 14.70 | 4,267 |
| Mountain | 14.20 | 3,825 | 14.40 | 4,179 |
| East North Central | 6.08 | 1,638 | 6.43 | 1,866 |
| West South Central | 5.42 | 1,460 | 5.83 | 1,692 |
| New England | 5.64 | 1,519 | 5.65 | 1,640 |
| West North Central | 1.85 | 498 | 2.01 | 583 |
| East South Central | 1.47 | 396 | 1.96 | 569 |
| States | | | | |
| Florida | 26.71 | 7,195 | 27.01 | 7,839 |
| New York | 28.07 | 7,561 | 26.61 | 7,723 |
| California | 21.57 | 5,810 | 21.82 | 6,333 |
| Nevada | 11.46 | 3,087 | 11.59 | 3,364 |
| Hawaii | 11.81 | 3,181 | 10.27 | 2,981 |
| Massachusetts | 4.65 | 1,253 | 4.92 | 1,428 |
| Illinois | 3.98 | 1,072 | 4.49 | 1,303 |
| Guam | 4.30 | 1,158 | 4.44 | 1,289 |
| Texas | 4.14 | 1,115 | 4.35 | 1,263 |
| Arizona | 3.13 | 843 | 3.17 | 920 |
| Pennsylvania | 2.72 | 733 | 2.70 | 784 |
| Georgia | 2.64 | 711 | 2.42 | 702 |
| Washington | 1.65 | 444 | 2.35 | 682 |
| New Jersey | 2.31 | 622 | 2.05 | 595 |
| Utah | ** | ** | 1.73 | 502 |
| Louisiana | ** | ** | 1.64 | 476 |

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2015 Industry Sector Profile: Lodging

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

| Visitation to U.S. Destinations/Regions (4) | Market Share 2013 (Percent) | Volume 2013 (000) | Market Share 2014 (Percent) | Volume 2014 (000) |
|---|-----------------------------|-------------------|-----------------------------|-------------------|
| Cities | | | | |
| New York City | 27.54 | 7,418 | 26.03 | 7,555 |
| Miami | 15.88 | 4,278 | 15.87 | 4,606 |
| Orlando | 14.94 | 4,024 | 15.28 | 4,435 |
| Los Angeles | 13.59 | 3,661 | 13.29 | 3,857 |
| Las Vegas | 11.25 | 3,030 | 11.31 | 3,283 |
| San Francisco | 10.50 | 2,828 | 10.52 | 3,053 |
| Honolulu Oahu | 9.99 | 2,691 | 8.53 | 2,476 |
| Washington, D.C. | 5.97 | 1,608 | 5.86 | 1,701 |
| Boston | 4.28 | 1,153 | 4.54 | 1,318 |
| Chicago | 3.78 | 1,018 | 4.34 | 1,260 |
| San Diego | 3.48 | 937 | 3.40 | 987 |
| Ft. Lauderdale | 2.52 | 679 | 2.47 | 717 |
| Flagstaff/Grand Canyon/Sedona | 2.30 | 620 | 2.19 | 636 |
| Seattle | 1.53 | 412 | 2.15 | 624 |
| Florida Keys | 1.90 | 512 | 2.08 | 604 |
| Houston | 2.28 | 614 | 2.04 | 592 |
| Atlanta | 2.22 | 598 | 2.00 | 580 |
| Anaheim-Santa Ana | 1.95 | 525 | 1.86 | 540 |
| Philadelphia | 1.76 | 474 | 1.84 | 534 |
| Tampa-St. Petersburg | 1.69 | 455 | 1.64 | 476 |
| New Orleans | ** | ** | 1.53 | 444 |

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- (1) 2015 arrivals and percent change reflect a combination of additional records counted and market conditions.
- (2) Excludes Canada and Mexico
- (3) Percentage-point and percentage changes are based on non-rounded data.
- (4) 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.
- (r) Estimate was revised.
- (p) Estimate is preliminary and subject to revision.

This profile shows only a portion of the 37 travel characteristics data reported on international arrivals to the United States. 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? The 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

Publication Date: July 2016

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.

Survey of International Air Travelers: Table Number and Description

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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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