



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

# Forecast for International Travel

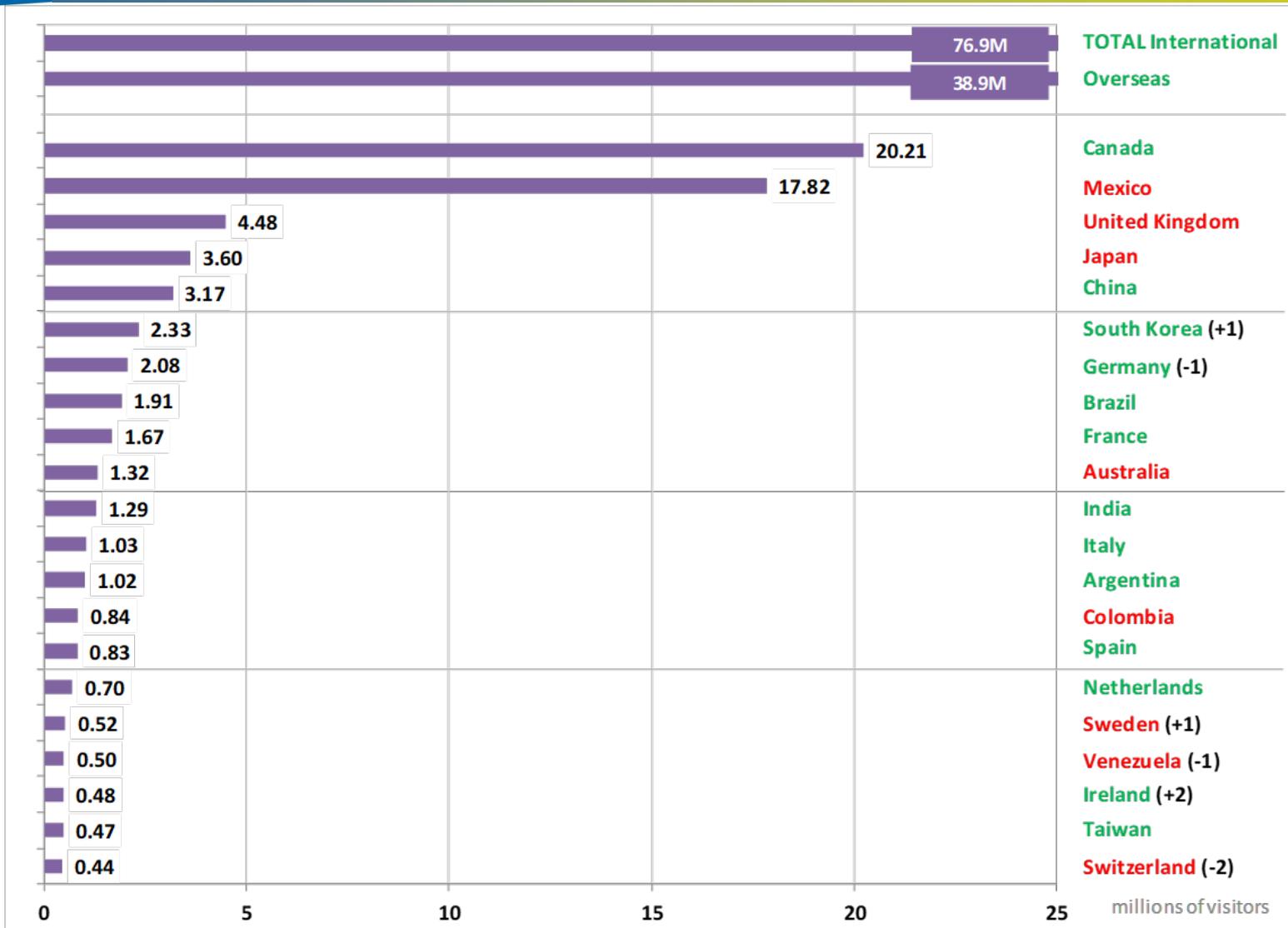


**Presented by:**

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



# Visitor Volume 2017 (millions)





# Visitor Volume Percent Change 2016 to 2017





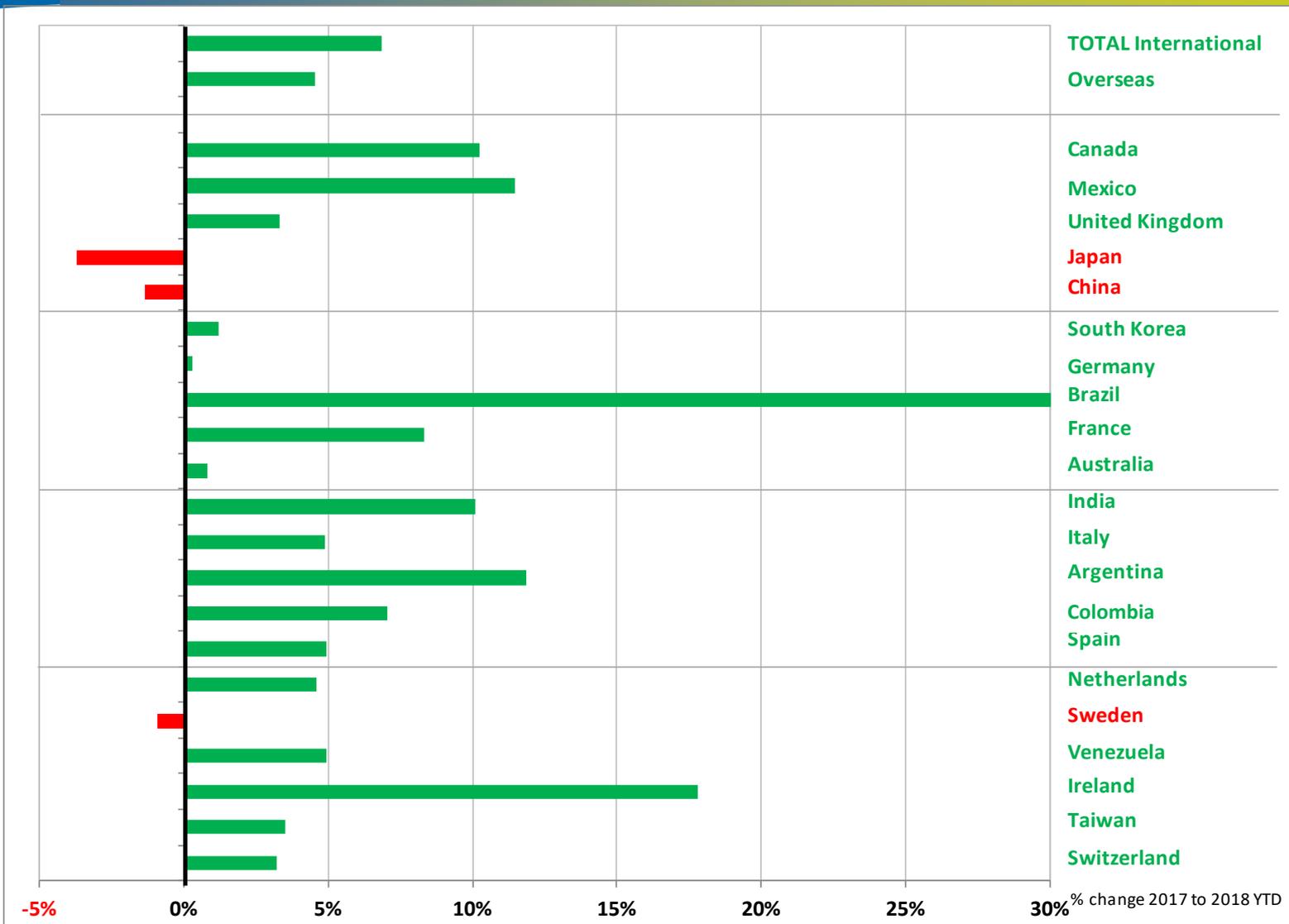
# Visitor Volume Change 2016 to 2017





# Visitor Percent Change 2018 YTD vs. 2017 YTD

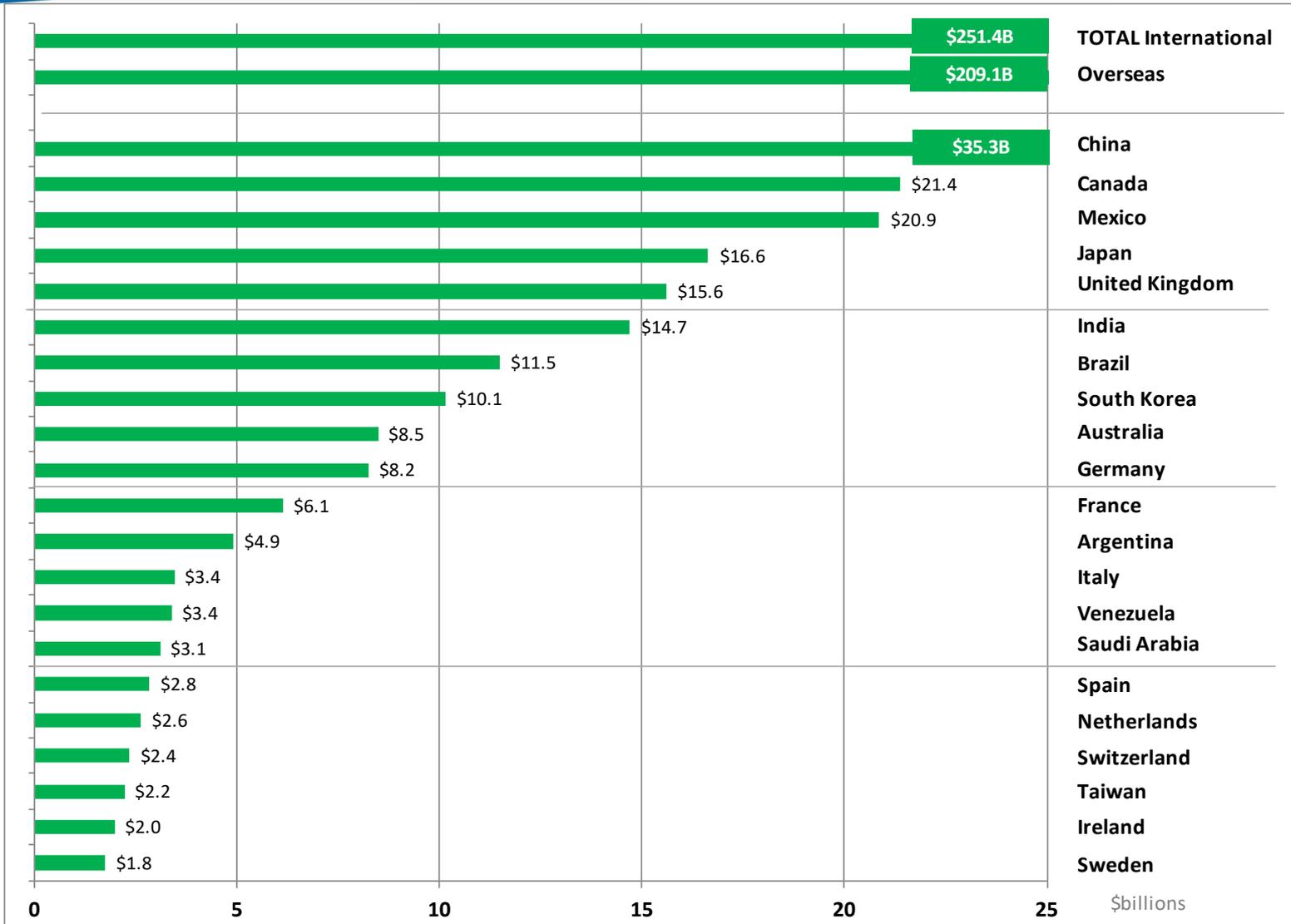
January-May





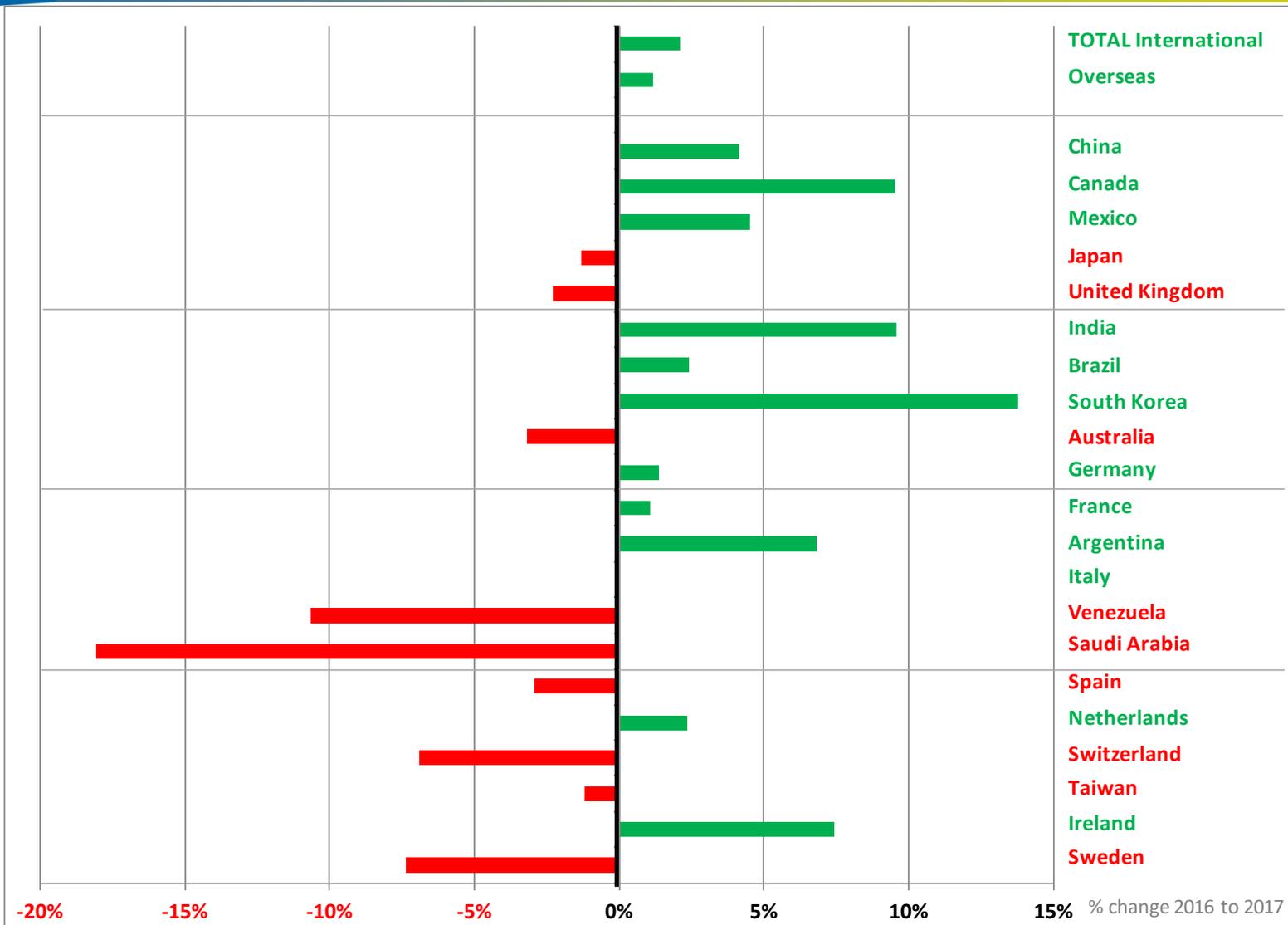
# Visitor Spending 2017

(\$billions)



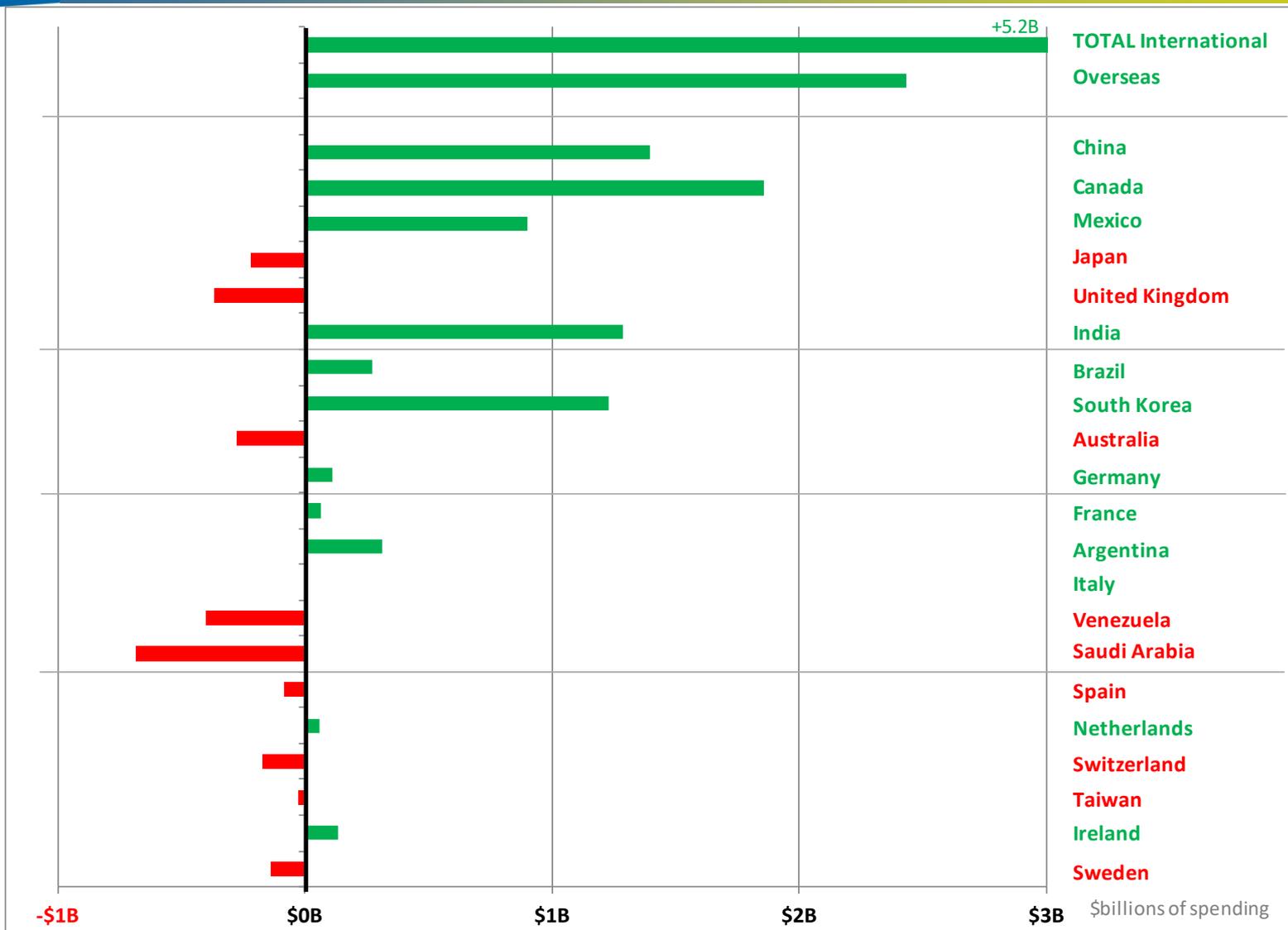


# Visitor Spending Percent Change 2016 to 2017 (%)





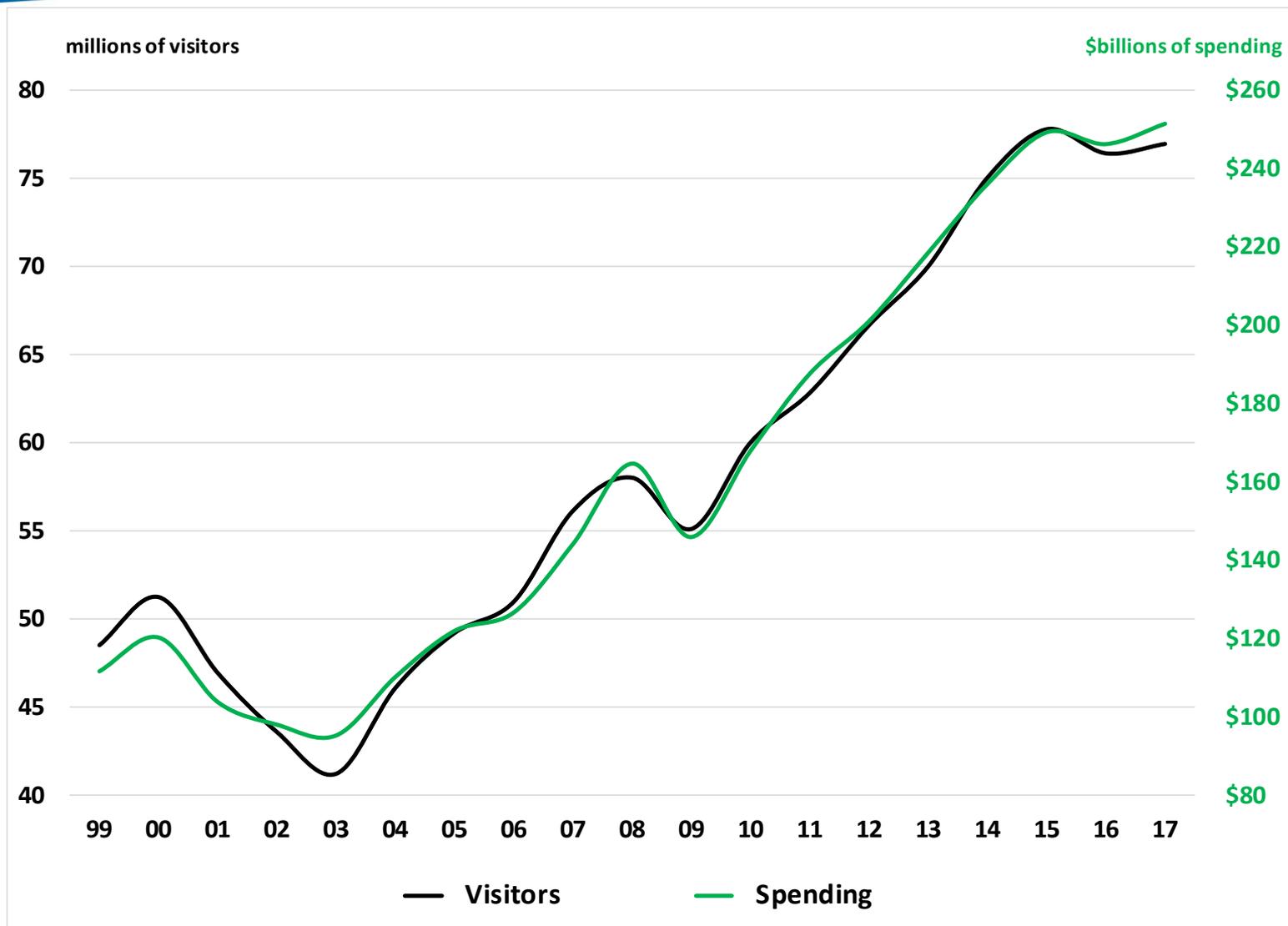
# Visitor Spending Change 2016 to 2017





# U.S. Visitor and Spending Trends

(millions / \$billions)





# U.S. Visitor and Spending Top Tens

(millions / \$billions)

	2017			2017			
	Arrivals	17/16	Record	Spending	17/16	Record	
	(millions)		Year	(billions)		Year	
<b>Canada</b>	20.21	4.8%	2013	<b>China</b>	\$35.30	14.2%	2017
<b>Mexico</b>	17.82	-6.1%	2016	<b>Mexico</b>	\$20.86	8.4%	2017
<b>United Kingdom</b>	4.48	-2.3%	2015	<b>Canada</b>	\$21.37	8.6%	2013
<b>Japan</b>	3.60	-0.2%	1997	<b>Japan</b>	\$16.64	6.7%	2000
<b>China</b>	3.17	4.1%	2017	<b>United Kingdom</b>	\$15.60	6.3%	2015
<b>South Korea</b>	2.33	17.8%	2017	<b>India</b>	\$14.70	5.9%	2017
<b>Germany</b>	2.08	1.7%	2015	<b>Brazil</b>	\$11.48	4.6%	2014
<b>Brazil</b>	1.91	10.8%	2014	<b>South Korea</b>	\$10.15	4.1%	2017
<b>France</b>	1.67	1.6%	2015	<b>Australia</b>	\$8.48	3.4%	2015
<b>Australia</b>	1.32	-2.0%	2015	<b>Germany</b>	\$8.25	3.3%	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 (%)
	<b>All Countries</b>	<b>\$1,340</b>			<b>All Countries</b>	<b>1,329</b>	
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%



# 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	Visitor	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Forecast	%	Change	Change	CAGR
Order	Origin	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	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%
	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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	Visitor	Actual	%	Forecast	%	Change	Change	CAGR										
Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>83,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
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%
	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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

2018 Fall Forecast (October)

## Forecast of International Travel

Estimates in thousands

Rank	Visitor
Order	Origin
2017	Country
<b>Grand Total</b>	
1	Canada
2	Mexico
<b>Overseas</b>	
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

<b>Grand Total</b>		<b>76,94</b>
1	Canada	20,21
2	Mexico	17,82
<b>Overseas</b>		<b>38,90</b>
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



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

	%		%		%		%		%		%
Forecast	Change										
2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22



# The NTTO Travel

2018 Fall Forecast (October 2017)

Change	% Change	
	23/17	23/17
18,574	24%	3.7%
4,391	22%	3.3%
5,138	29%	4.3%
<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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%

ate

Change	% Change	
	23/17	23/17
18,574	24%	3.7%
4,391	22%	3.3%
5,138	29%	4.3%
<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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%



# 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	Visitor	Actual	%	Forecast	%	Change	Change	CAGR										
Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country																	
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>85,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
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%
	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>41,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
3	United Kingdom	4,483	-2%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	921	21%	3.2%
4	Japan	3,596	-0%	3,596	0%	3,596	0%	3,596	0%	3,596	0%	3,629	1%	3,702	2%	106	3%	0.5%
5	China	3,174	4%	3,174	0%	3,174	0%	3,174	0%	3,174	0%	3,821	7%	4,127	8%	953	30%	4.5%
6	South Korea	2,335	18%	2,335	0%	2,335	0%	2,335	0%	2,335	0%	2,705	3%	2,786	3%	451	19%	3.0%
7	Germany	2,080	2%	2,080	0%	2,080	0%	2,080	0%	2,080	0%	2,252	1%	2,297	2%	217	10%	1.7%
8	Brazil	1,912	11%	1,912	0%	1,912	0%	1,912	0%	1,912	0%	2,324	5%	2,463	6%	551	29%	4.3%
9	France	1,668	2%	1,668	0%	1,668	0%	1,668	0%	1,668	0%	2,027	2%	2,067	2%	400	24%	3.6%
10	Australia	1,324	-2%	1,324	0%	1,324	0%	1,324	0%	1,324	0%	1,519	5%	1,610	6%	287	22%	3.3%
11	India	1,285	7%	1,285	0%	1,285	0%	1,285	0%	1,285	0%	1,768	6%	1,874	6%	589	46%	6.5%
12	Italy	1,032	4%	1,032	0%	1,032	0%	1,032	0%	1,032	0%	1,196	2%	1,220	2%	188	18%	2.8%
13	Argentina	1,018	10%	1,018	0%	1,018	0%	1,018	0%	1,018	0%	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%	827	0%	827	0%	827	0%	827	0%	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	Visitor	Actual	%	Forecast	%	Change	Change	CAGR										
Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>83,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
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%
	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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	Visitor	Actual	%	Forecast	%	Change	%	CAGR										
Order	Origin	2017	Change	2018	Change	2019	Change	2020	Change	2021	Change	2022	Change	2023	Change	23/17	Change	23/17
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>83,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
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%
	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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

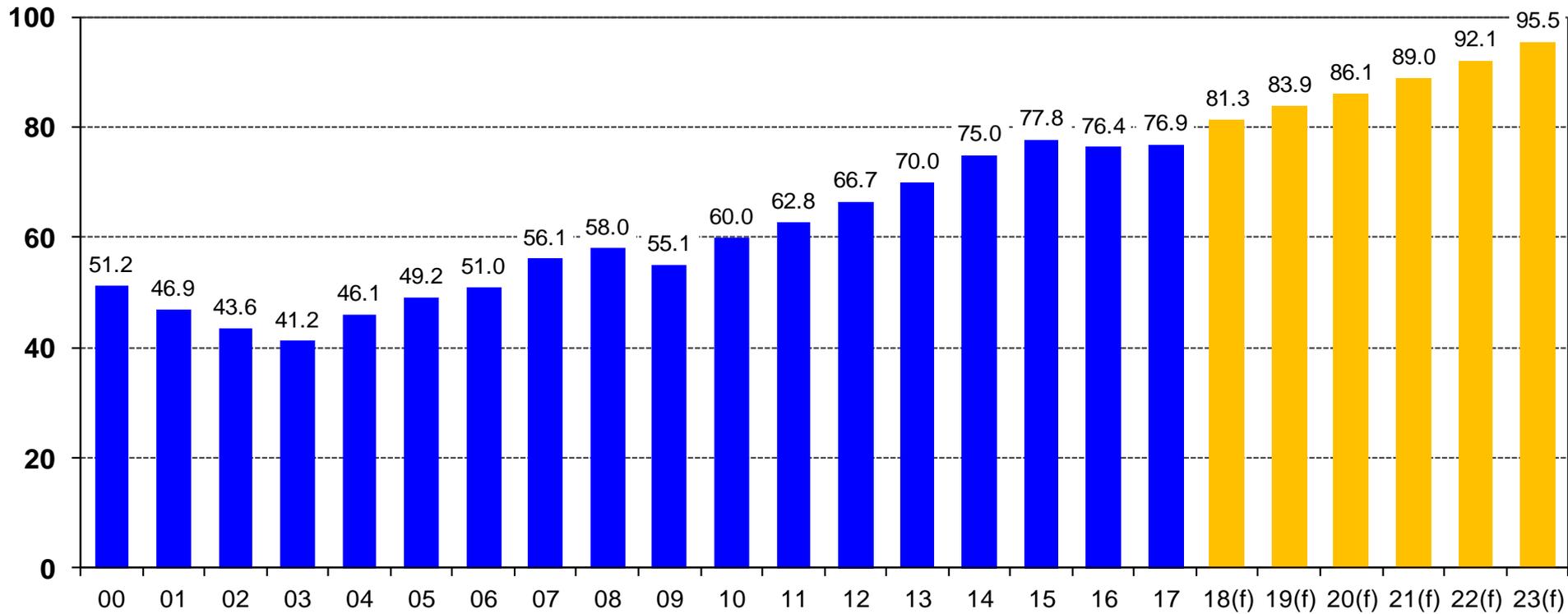
Estimates in thousands

Rank	Visitor	Actual	%	Forecast	%	Change	%	CAGR										
Order	Origin	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	<b>Grand Total</b>	<b>76,941</b>	<b>0.7%</b>	<b>81,317</b>	<b>5.7%</b>	<b>83,897</b>	<b>3.2%</b>	<b>86,135</b>	<b>2.7%</b>	<b>88,952</b>	<b>3.3%</b>	<b>92,117</b>	<b>3.6%</b>	<b>95,516</b>	<b>3.7%</b>	<b>18,574</b>	<b>24%</b>	<b>3.7%</b>
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%
	<b>Overseas</b>	<b>38,906</b>	<b>2%</b>	<b>40,869</b>	<b>5%</b>	<b>42,025</b>	<b>2.8%</b>	<b>43,225</b>	<b>2.9%</b>	<b>44,755</b>	<b>3.5%</b>	<b>46,382</b>	<b>3.6%</b>	<b>47,951</b>	<b>3.4%</b>	<b>9,046</b>	<b>23%</b>	<b>3.5%</b>
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%; 2018YTD: +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; 2018 YTD Jan-May up 7%. Uneven performance across the top origin markets for both years.
- **USA Travel Exports**—2017 vs. 2016
  - +2.1% Total
  - +1.9% Receipts
  - +8.6 Education/Medical/Seasonal Workers
  - +0.1% Travel Spending (excluding E/M/S)
  - +3.4% 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/departing the USA via air regardless of residence or purpose. The non-USA citizen count (entering the USA) consistently up 3.5% to 4.5% throughout 2018. 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.
- **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**—FY17 (Oct-Sep) U.S. Dept. of State visa issuance **-9%**, but **-1%** not counting 27% decline for China.
- **Miscellaneous**—gasoline after-tax ‘windfall’ versus several years ago continues, even more so to start 2019. 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
<b>Overseas</b>	<b>99</b>	<b>104</b>	<b>95</b>	<b>111</b>	<b>122</b>	<b>136</b>	<b>152</b>	<b>154</b>	<b>170</b>	<b>179</b>	<b>174</b>
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



# BOISE

IDAHO



- Alaska
- Arizona
- California
- Colorado
- Hawaii
- Idaho
- Montana
- Nevada
- New Mexico
- North Dakota
- Oregon
- South Dakota
- Texas
- Utah
- Washington
- Wyoming

FEBRUARY 25-28, 2019

Photo courtesy of Idaho Tourism - Wallace Lake Near Salmon



# GO WEST Top Markets

A	B	C	D	E	F	G	H	I	J
	2012	2013	2014	2015	2016	2017	Growth	Change	Share of
	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	17/12	17/12	Overseas
							(000s)		Growth
All Overseas	8,899	9,643	10,501	12,013	11,919	11,960	3,061	34%	100%
China	808	932	1,284	1,322	1,608	1,586	778	96%	25%
United Kingdom	1,136	1,220	1,246	1,492	1,438	1,378	242	21%	8%
Australia	663	705	823	949	851	782	119	18%	4%
Japan	673	660	702	811	703	737	64	10%	2%
Germany	638	653	699	766	673	703	65	10%	2%
South Korea	482	457	488	606	662	720	238	49%	8%
France	483	525	565	595	562	532	49	10%	2%
India	305	374	419	547	535	613	308	101%	10%
Taiwan	164	224	259	279	302	317	153	93%	5%
Brazil	385	367	390	376	290	329	-56	-15%	-2%
Italy	200	208	238	311	286	261	61	30%	2%
Netherlands	190	178	232	238	224	208	18	9%	1%
Spain	163	139	148	169	186	219	56	34%	2%
New Zealand	---	---	---	205	199	---	---	---	---
Sweden	123	134	140	193	153	159	36	29%	1%
Switzerland	131	158	160	171	145	136	5	4%	0%
Colombia	63	135	111	124	139	142	79	127%	3%
Argentina	101	97	95	93	111	115	14	13%	0%
Denmark	86	92	---	118	106	---	---	---	---
Ireland	85	86	92	115	101	124	39	45%	1%
Top 20 % of All O/S	77%	76%	77%	79%	78%	76%	74%		
Canada	9,578	10,422	10,399	9,365	9,700	10,000	422	4%	---
Mexico Air Only	1,245	1,271	1,323	1,506	1,334	1,300	55	4%	---



# GO WEST SUMMIT Destination Visitor Volume

	Overseas						Mexico Air Only						Canada						Total International					
	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017	2012	2013	2014	2015	2016	2017
	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)	(000s)						
<b>Go West Region</b>	<b>11,726</b>	<b>12,815</b>	<b>13,596</b>	<b>15,034</b>	<b>15,066</b>	<b>15,298</b>	<b>1,279</b>	<b>1,287</b>	<b>1,330</b>	<b>1,521</b>	<b>1,339</b>	<b>1,304</b>	<b>10,896</b>	<b>11,998</b>	<b>11,957</b>	<b>10,713</b>	<i>10,979</i>	<i>11,361</i>	<b>23,901</b>	<b>26,100</b>	<b>26,882</b>	<b>27,268</b>	<i>27,384</i>	<i>27,963</i>
Alaska	89	96	103	157	101	93	6	2	5	7	2	5	136	257	262	278	<i>250</i>	<i>255</i>	232	355	370	442	<i>354</i>	<i>353</i>
Arizona	804	833	940	1,044	1,158	1,035	42	49	45	44	57	43	728	853	909	848	<i>764</i>	<i>779</i>	1,574	1,734	1,894	1,936	<i>1,978</i>	<i>1,857</i>
California	6,012	6,472	7,166	8,139	8,221	8,178	460	428	528	505	477	489	1,543	1,594	1,666	1,638	<i>1,476</i>	<i>1,505</i>	8,014	8,493	9,360	10,282	<i>10,174</i>	<i>10,172</i>
Colorado	446	384	451	461	485	459	21	20	40	49	57	75	163	168	218	179	<i>161</i>	<i>165</i>	631	573	709	689	<i>704</i>	<i>699</i>
Hawaii	2,827	3,172	3,074	3,021	3,146	3,319	32	16	7	15	5	4	557	788	855	814	<i>798</i>	<i>870</i>	3,416	3,975	3,936	3,850	<i>3,949</i>	<i>4,193</i>
Idaho	30	32	48	50	45	70	2	2	5	5	2	2	305	380	357	308	<i>278</i>	<i>283</i>	337	414	410	363	<i>325</i>	<i>355</i>
Montana	30	32	79	92	56	58				1			776	775	697	609	<i>549</i>	<i>560</i>	806	807	776	702	<i>605</i>	<i>618</i>
Nevada	2,768	2,915	3,074	3,505	3,417	3,023	290	330	314	329	281	287	1,587	1,662	1,556	1,419	<i>1,279</i>	<i>1,304</i>	4,645	4,908	4,943	5,253	<i>4,976</i>	<i>4,614</i>
New Mexico	89	96	100	111	117	86	0	9	17	7	5	6	102	92	85	86	<i>77</i>	<i>79</i>	191	197	202	204	<i>199</i>	<i>171</i>
North Dakota			21			19	2						761	788	702	534	<i>481</i>	<i>491</i>	763	788	723	534	<i>481</i>	<i>510</i>
Oregon	208	192	255	319	289	331	15	11	24	9	14	15	427	475	440	381	<i>343</i>	<i>350</i>	650	678	718	709	<i>647</i>	<i>696</i>
South Dakota	30	32	62	54	68				7	2		70	145	99	126	103	<i>93</i>	<i>95</i>	174	131	195	159	<i>160</i>	<i>165</i>
Texas	1,339	1,570	1,535	1,789	1,692	1,739	453	506	457	619	458	430	416	465	503	446	<i>402</i>	<i>410</i>	2,209	2,540	2,496	2,854	<i>2,551</i>	<i>2,579</i>
Utah	476	481	544	595	643	634	15	18	14	14	10	23	215	279	300	258	<i>232</i>	<i>237</i>	706	777	857	867	<i>886</i>	<i>894</i>
Washington	446	513	620	852	729	798	23	9	21	32	26	22	2,933	3,225	3,207	2,750	<i>2,478</i>	<i>2,527</i>	3,403	3,747	3,848	3,634	<i>3,233</i>	<i>3,347</i>
Wyoming	149	128	172	223	229	249		4	9	3	4		102	100	73	62	<i>56</i>	<i>57</i>	250	232	254	287	<i>289</i>	<i>306</i>



# BREXIT



- U.K. is the 2<sup>nd</sup> largest source for package travelers to the USA.
- Is Brexit included in the forecast?
- Will it impact air travel?



## 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 2017, but country performances were uneven. 2018 YTD through May was strong growth. No available data suggests 2018 won't end strong, perhaps a bit less strong.
- 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 often a combination of flat/lower overall volume, slightly lower incidence, slightly shorter hotel/motel stays.
- 5) All GO WEST states benefit from international travel...especially when focusing on hotel-motel room demand.



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

# How to Find Us



<http://trade.travel.gov>

Julie Heizer  
National Travel & Tourism Office  
U.S. Department of Commerce  
Phone: 202 482 4904  
[Julie.heizer@trade.gov](mailto:Julie.heizer@trade.gov)

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





INTERNATIONAL  
**TRADE**  
ADMINISTRATION





# National Travel & Tourism Office

## **NATIONAL TRAVEL AND TOURISM OFFICE**

**Primary POC within the Federal Government**

**NTTO Website & Publications**

**Research, Key Market Intelligence & National Strategy**

**Principal Liaison to Brand USA**

**Represents U.S. Travel and Tourism Policy internationally**



# International Trade Administration Travel and Tourism Resources

## Foreign Commercial Service

128 Offices in 75 countries

[www.trade.gov/cs/](http://www.trade.gov/cs/)

[www.export.gov/industry/travel/](http://www.export.gov/industry/travel/)

## National Travel & Tourism Office

[travel.trade.gov](http://travel.trade.gov)

## U.S. Commercial Service Domestic Field

Offices in more than 100 U.S. cities

[www.trade.gov/cs/](http://www.trade.gov/cs/)

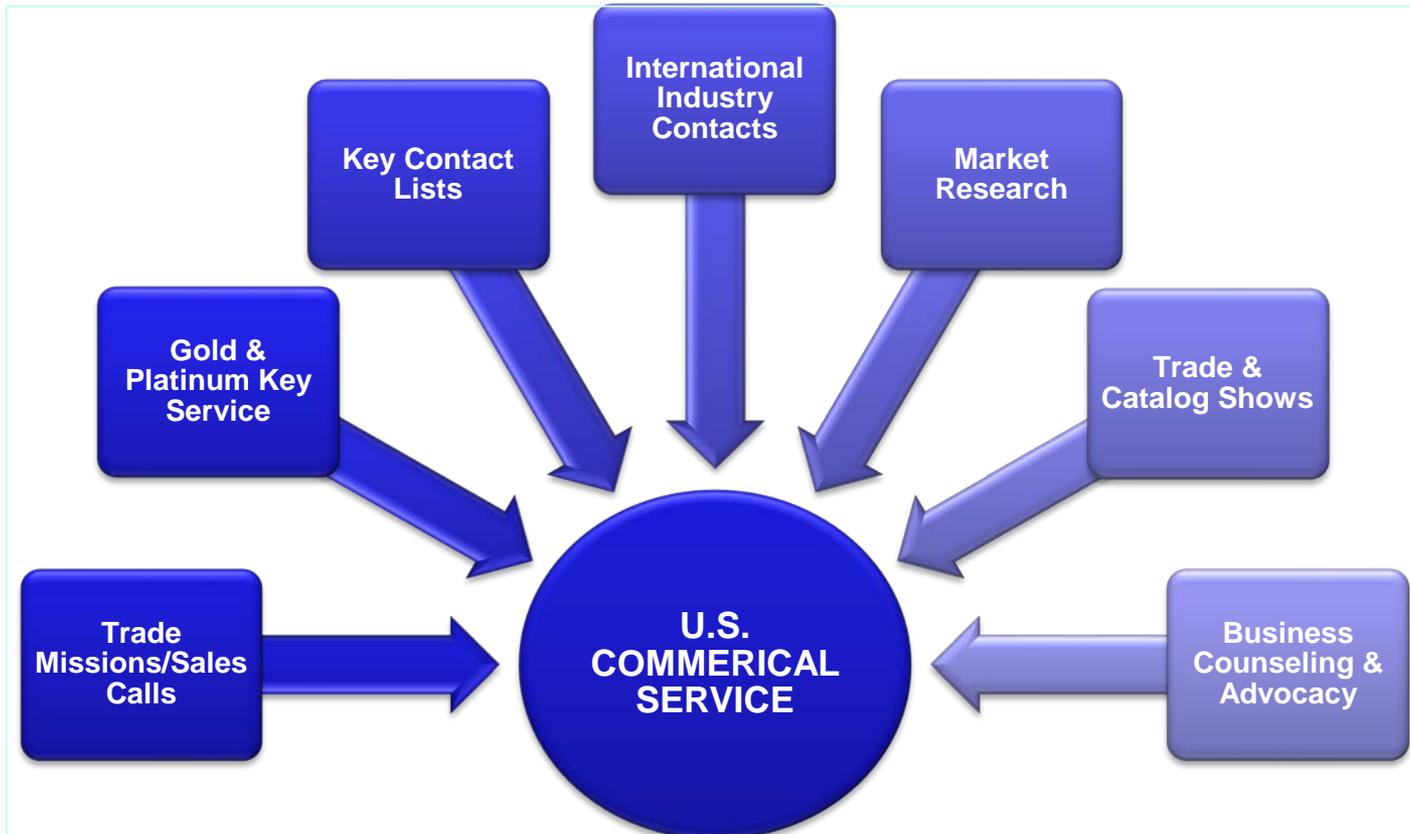
[www.export.gov/industry/travel/](http://www.export.gov/industry/travel/)

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

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



# U.S. COMMERCIAL SERVICE Selected Services Provided



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