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# International Travel from Latin America to the United States

State of the LATAM and Caribbean Markets  
Presented to:



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## Agenda

- About NTTO, including Statistical System
- Number of visitors into the U.S. (volume/share)
- Visitor spending in U.S. (US\$)
- Trip and traveler Characteristics
- Cities and states visited



# National Travel & Tourism Office

- Serves as **primary point of contact** for travel and tourism issues within the federal government and at the national level
- Serves as **Secretariat** to **Tourism Policy Council** and coordinates government-wide activities to support growth of the U.S. travel and tourism industry
- Serves as the **principal liaison** to the **Corporation for Travel Promotion** (d.b.a. Brand USA)
- Conducts **research** and produces **national statistics** on travel and tourism
- Represents U.S. travel and tourism policy in **international fora**



# National Travel & Tourism Office

## Current Initiatives re: Latin America

- Participating in USG efforts to assist Puerto Rico in re-starting its tourism program.
- Collaboration with the Government of Mexico (SECTUR and Banco de Mexico/INEGI) to enhance tourism data exchange program.
  - Elimination of Visit Mexico



# Overview of NTTO Statistical System

## Survey of International Air Travelers (SIAT)

Traveler & Trip Characteristics/Demographics (33 Questions)

2 populations: Non-U.S. Inbound and U.S. Outbound

DHS I-94  
Arrivals

DHS APIS/I-92  
Air Departures

(100% volume data: country and port of entry)

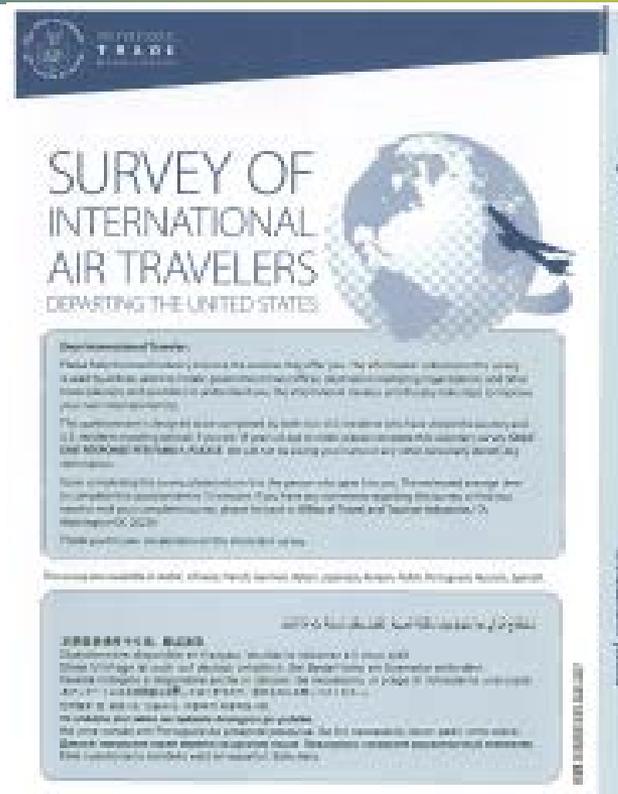


# Survey of International Air Travelers

English and 11  
Foreign language versions

Self administered by  
passenger

Same survey for non-resident  
and resident travelers ...  
Skip patterns



New version  
In 2012; rev 2016



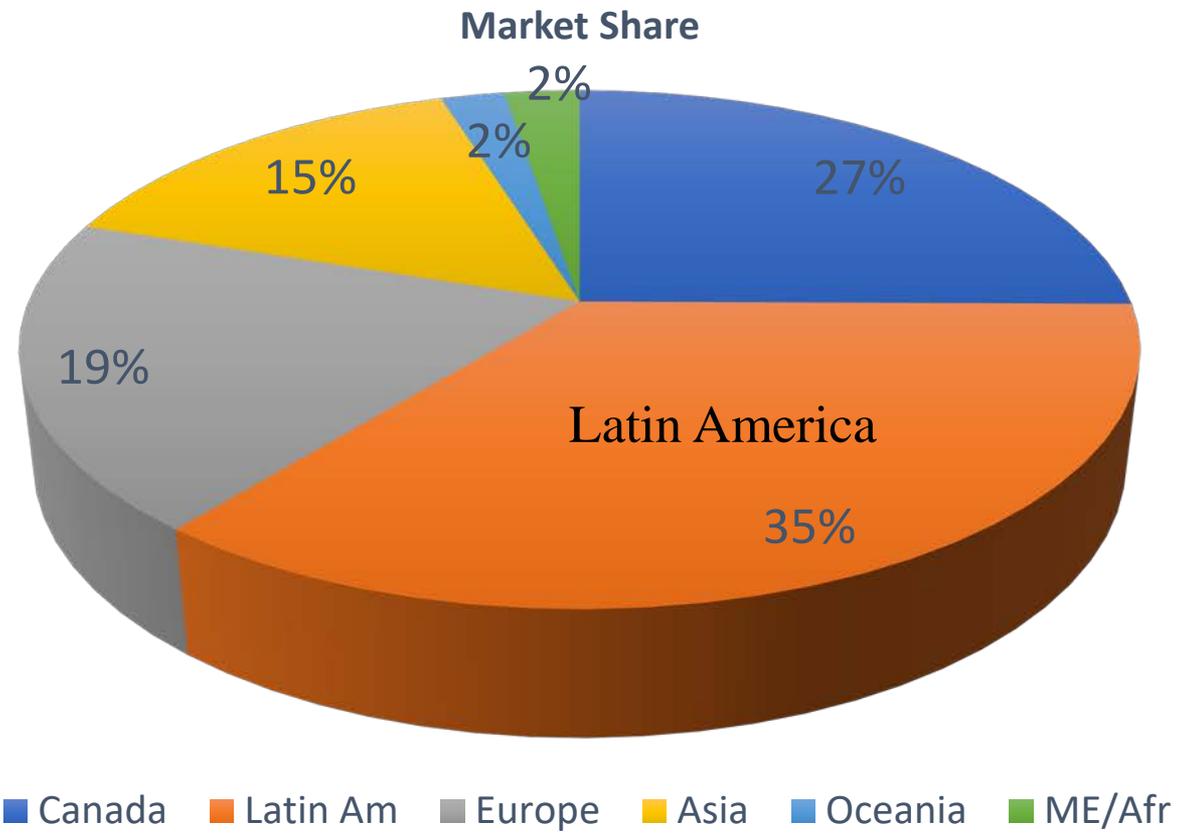
## Who Is an International Visitor? (Not just inbound air traffic)

“Any traveler taking a trip to a main destination outside their residence country, for at **least one night**, but less than one year, and for any main **purpose** (business, pleasure, student, or other personal purpose) other than to be employed in the country or place visited.”

- 19 qualifying visa types (incl. B1/2, WB/T, etc.)
- The World Tourism Organization (UNWTO) “*International Recommendations for Tourism Statistics 2008*” publication.
- The NTTO follows the UNWTO definition.



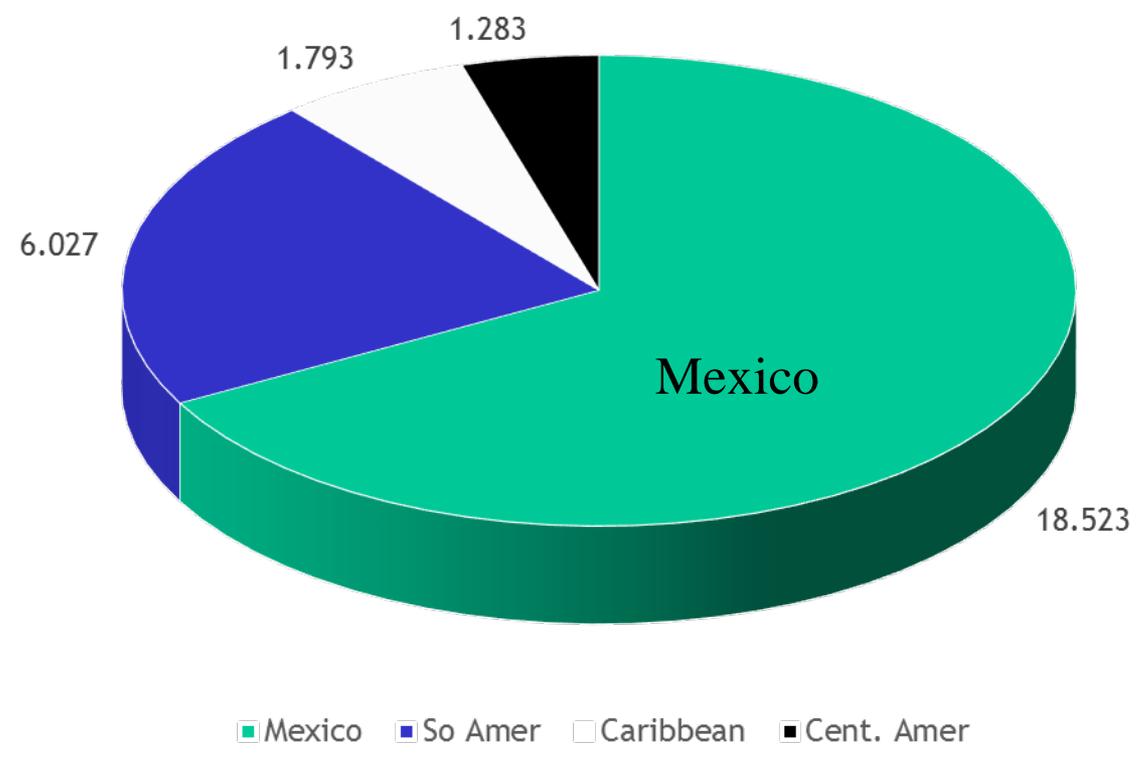
# 2018 Arrivals by World Region





# Latin America to the United States 2018

Visitor Volume (millions)





# Latin American Recap

## Travel to United States 2018

|                       | 2018              |                        | %Change YOY |
|-----------------------|-------------------|------------------------|-------------|
| Mexico                | <u>18,523,155</u> |                        | 3.9%        |
|                       | 10,415,284        | 'Tourists'             | 3.6%        |
|                       | 2,757,591         | Air (incl in Tourists) | 9.6%        |
|                       | 8,107,872         | Border 1+ nights       | 4.4%        |
| South America         | 6,026,916         |                        | 8.5%        |
| Caribbean             | 1,793,081         |                        | 7.3%        |
| Central America       | <u>1,283,374</u>  |                        | 9.9%        |
| Latin America Total = | 21,626,826        |                        | 5.4%        |



# Top South American Origin Markets Travel to the United States

| Region/Country Origin              | 2018<br>(000s) | 18/17<br>(% change) | 2019 July<br>YTD (% Change) |
|------------------------------------|----------------|---------------------|-----------------------------|
| <b>South America</b>               | <b>6,027</b>   | <b>8.5%</b>         | <b>-3.9%</b>                |
| 1 Brazil                           | 2,209          | 15.5%               | -3.5%                       |
| 2 Argentina                        | 994            | -2.4%               | -20.1%                      |
| 3 Colombia <sup>(1)</sup>          | 943            | 12.0%               | 6.3%                        |
| 4 Venezuela                        | 502            | 0.3%                | -14.9%                      |
| 5 Ecuador <sup>(1)</sup>           | 450            | 7.9%                | 6.1%                        |
| 6 Chile <sup>(1)</sup> Visa Waiver | 365            | 10.4%               | 5.3%                        |
| 7 Peru <sup>(1)</sup>              | 304            | 5.7%                | 12.0%                       |

(1) Record arrivals to the U.S. in 2018



## Top Caribbean Origin Markets for Travel to the United States

| Region/Country Origin               | 2018<br>(000s) | 18/17<br>(%change) | 2019 July<br>(YTD % Change) |
|-------------------------------------|----------------|--------------------|-----------------------------|
| <b>Caribbean <sup>(1)</sup></b>     | <b>1,793</b>   | <b>7.3%</b>        | <b>8.7%</b>                 |
| 1 Dominican Republic <sup>(1)</sup> | 451            | 6.6%               | 8.9%                        |
| 2 Jamaica <sup>(1)</sup>            | 290            | 4.5%               | 1.1%                        |
| 3 Bahamas                           | 275            | 0.1%               | 6.5%                        |
| 4 Trinidad & Tobago                 | 168            | 2.9%               | 10.9%                       |
| 5 Haiti                             | 131            | -3.7%              | -1.2%                       |
| 6 Cuba <sup>(1)</sup>               | 116            | 11.2%              | 0.1%                        |
| 7 Bermuda                           | 81             | 14.0%              | 4.4%                        |

(1) Record arrivals to the U.S. in 2018



# Top Central American Origin Markets Travel to the United States

| Region/Country Origin                 | 2018<br>(000s) | 18/17<br>(% change) | 2019 July<br>(YTD % change) |
|---------------------------------------|----------------|---------------------|-----------------------------|
| <b>Central America <sup>(1)</sup></b> | <b>1,283</b>   | <b>9.9%</b>         | <b>9.8%</b>                 |
| 1 Costa Rica <sup>(1)</sup>           | 316            | 14.0%               | 10.3%                       |
| 2 Guatemala <sup>(1)</sup>            | 272            | 8.1%                | 8.2%                        |
| 3 Honduras <sup>(1)</sup>             | 213            | 3.3%                | 0.2%                        |
| 4 El Salvador <sup>(1)</sup>          | 212            | 14.0%               | 11.5%                       |
| 5 Panama                              | 175            | 11.1%               | 25.4%                       |
| 6 Nicaragua                           | 67             | 8.4%                | 0.9%                        |

(1) Record arrivals to the U.S. in 2018



# Mexican Travel to the United States

| Region/Country Origin | 2018<br>(000s) | 18/17<br>(% change) | 2019 June<br>(YTD % change) |
|-----------------------|----------------|---------------------|-----------------------------|
| <b>Mexico</b>         | <b>18,523</b>  | <b>3.9%</b>         | <b>-7.4%</b>                |
| • Tourists            | 10,415         | 3.6%                | -1.6%                       |
| Air <sup>(1)</sup>    | 2,757          | 9.6%                | tbd %                       |
| • Border 1+ nights    | 8,107          | 4.4%                | -13.7%                      |



## 2019 Inbound Air Capacity (# Available Seats, % Change yoy)

- 2H 2019
  - South America, 4.6m, **-7.0%** [Brazil **-11.0%**]
  - Central America, 3.7m, 1.0% [**-2.5%** frequencies]
  - Caribbean, 11.3m, 6.8%
  - Mexico, 8.9m, **-3.7%**
- Forecast comments – generally positive, however NTTO will issue new forecast in October.



# Latin American Visitors to U.S. Destinations 2018

## % of LA Regional Visitors to U.S. States

| STATE VISITATION | South America | Central America | Caribbean | Mexico (Air) |
|------------------|---------------|-----------------|-----------|--------------|
| Florida          | 60            | 41              | 55        | 17           |
| New York         | 25            | 7               | 31        | 12           |
| California       | 9             | 18              |           | 21           |
| Texas            | 5             | 13              |           | 18           |
| Nevada           | 4             |                 |           | 10           |
| Illinois         | 3             |                 |           | 8            |
| Massachusetts    | 3             |                 |           |              |
| Georgia          | 2             |                 |           |              |
| New Jersey       | 2             |                 | 5         |              |
| Pennsylvania     | 2             |                 |           |              |



## Top Latin America Origin Markets for Traveler Spending to/in the U.S.

| Origin of Visitor          | 2013<br>(billions \$US) | 2017<br>(billions \$US) | 2018p<br>(billions \$US) | % change   |           |
|----------------------------|-------------------------|-------------------------|--------------------------|------------|-----------|
|                            |                         |                         |                          | 13/17      | 17/18     |
| <b>Total International</b> | <b>\$218.5</b>          | <b>\$251.5</b>          | <b>\$256.1</b>           | <b>15%</b> | <b>2%</b> |
| <b>Latin America</b>       | <b>\$54.2</b>           | <b>\$59.0</b>           | <b>\$62.0</b>            | <b>9%</b>  | <b>4%</b> |
| South and<br>Central Amer. | \$50.0                  | \$54.4                  | \$56.2                   | 9%         | 3%        |
| 1 Mexico                   | \$18.2                  | \$20.5                  | \$20.9                   | 13%        | 2%        |
| 2 Brazil                   | \$12.6                  | \$11.6                  | \$12.3                   | -8%        | 6%        |
| 3 Venezuela                | \$4.4                   | \$3.4                   | \$3.3                    | -23%       | -1%       |
| 4 Argentina                | \$3.6                   | \$5.0                   | \$4.9                    | 39%        | -1%       |
| 5 Chile                    | \$1.0                   | \$1.5                   | \$1.48                   | 50%        | -3%       |

Note: The Department of Commerce, Bureau of Economic Analysis updated and expanded its estimates for travel exports in October 2016. Now, 15 country estimates are available for 2012-2015 expanding it from the 6 country estimates released previously



## Methods of Payment Used by Visitors from Latin America & If Travel Insurance was Purchased to the U.S. (2018)

| Payment Method *                             | Mexico (Air) | Brazil  | Colombia | Argentina |
|--|--------------|---------|----------|-----------|
| Purchases Using Credit Card                  | 39%          | 30%     | 34%      | 47%       |
| Cash from Home/Traveler Checks               | 30%          | 47%     | 43%      | 37%       |
| Cash Adv. Using Credit Card                  | 12%          | 14%     | 8%       | 7%        |
| Cash Adv. Using Debit Card                   | 9%           | 3%      | 7%       | 2%        |
| Purchases using Debit Card                   | 10%          | 7%      | 8%       | 8%        |
| <br>Purchased Travel Insurance for this Trip | <br>23%      | <br>81% | <br>37%  | <br>73%   |

\* Note: Average reported by category



# Information Sources Used by Visitors from Latin America Markets to the U.S. (2018)

| Information Sources             | Mexico (Air) | Brazil | Colombia | Argentina |
|---------------------------------|--------------|--------|----------|-----------|
| Airline                         | 56%          | 58%    | 54%      | 42%       |
| Online Travel Agency            | 35%          | 35%    | 32%      | 39%       |
| Personal Recommendations        | 25%          | 43%    | 37%      | 35%       |
| National/State/City Travel Ofc. | 13%          | 20%    | 13%      | 20%       |
| Travel Agency Office.           | 8%           | 17%    | 12%      | 10%       |
| Advance Decision (avg days):    |              |        |          |           |
| Trip Decision:                  | 61           | 120    | 76       | 125       |
| Airline Booking:                | 44           | 87     | 53       | 96        |

Note: Multiple choice responses allowed for information sources.



## Purpose of Trip for Visitors from Latin America Markets to the U.S. (2018)

| Purposes of Trip        | Mexico (Air) | Brazil | Colombia | Argentina |
|-------------------------|--------------|--------|----------|-----------|
| Vacation/Holiday        | 64%          | 81%    | 74%      | 90%       |
| Visit Friends/Relatives | 34%          | 22%    | 42%      | 16%       |
| Business                | 19%          | 10%    | 10%      | 5%        |
| Convention/Conference   | 8%           | 7%     | 7%       | 3%        |
| Education               | 4%           | 7%     | 3%       | 2%        |
| Medical                 | 1%           | 0.3%   | 1%       | 0.2%      |
| NET PURPOSES OF TRIP:   |              |        |          |           |
| Leisure/VFR             | 79%          | 88%    | 90%      | 96%       |
| Business/Convention     | 24%          | 16%    | 15%      | 8%        |

Note: Multiple choice responses allowed for purpose of trip.



# Select Characteristics for Visitors from Latin America Markets to the U.S. (2018)

| Trip / Party Characteristic   | Mexico (Air) | Brazil   | Colombia | Argentina |
|-------------------------------|--------------|----------|----------|-----------|
| # of Nights in U.S.: Mean     | 12           | 16       | 18       | 13        |
| # of Nights in U.S.: Median   | 6            | 10       | 10       | 11        |
| % 1st-Time U.S.               | 12%          | 17%      | 18%      | 19%       |
| Visited Only 1 State          | 91%          | 75%      | 83%      | 76%       |
| Avg # of Destinations Visited | 1.5          | 1.8      | 1.9      | 1.9       |
| 1+ Night in Hotel/Motel       | 68%          | 78%      | 61%      | 84%       |
| Party size                    | 1.5          | 1.9      | 1.6      | 2.0       |
| Average Household Income      | \$58,000     | \$64,500 | \$55,000 | \$49,500  |
| % Male/Female                 | 51/49%       | 52/48%   | 47/53%   | 44/56%    |



# Transportation Modes Used by Visitors from Latin American Markets in the U.S. (2018)

| Transportation Modes in U.S. | Mexico (Air) | Brazil | Colombia | Argentina |
|------------------------------|--------------|--------|----------|-----------|
| Auto Private or Company      | 42%          | 37%    | 47%      | 29%       |
| Rented Auto                  | 21%          | 45%    | 36%      | 43%       |
| Taxicab/Limousine            | 25%          | 19%    | 13%      | 19%       |
| Airlines between U.S. Cities | 17%          | 24%    | 19%      | 30%       |
| Ride Sharing (Uber/Lyft)     | 19%          | 12%    | 16%      | 16%       |
| Bus between Cities           | 12%          | 11%    | 17%      | 16%       |

Note: Multiple choice responses allowed for transportation modes.



# Activity Participation of Latin Travelers to the United States 2018

| Activity                 | Mexico (Air) | Brazil | Colombia | Argentina |
|--------------------------|--------------|--------|----------|-----------|
| Shopping                 | 83%          | 87%    | 86%      | 85%       |
| Sightseeing              | 65%          | 77%    | 74%      | 82%       |
| Experience Fine Dining   | 23%          | 21%    | 26%      | 10%       |
| Amusement/Theme Park     | 28%          | 46%    | 43%      | 41%       |
| Art Galleries/Museums    | 24%          | 31%    | 24%      | 31%       |
| National Parks/Mom.      | 24%          | 36%    | 27%      | 29%       |
| Nightlife                | 18%          | 12%    | 16%      | 11%       |
| Historical Locations     | 17%          | 28%    | 20%      | 23%       |
| Small Towns/Countryside  | 16%          | 18%    | 27%      | 14%       |
| Concert/Plays/Musicals   | 13%          | 19%    | 11%      | 13%       |
| Cultural Ethnic Heritage | 12%          | 9%     | 15%      | 17%       |
| Guided Tours             | 10%          | 11%    | 16%      | 18%       |



# U.S. Cities Visited via Ports (2018)

## %’s Visits vs Ports of Entry

| City Visited | Port of Entry | Argentina visits | POE | Brazil visits | POE | Colombia Visits | POE |
|--------------|---------------|------------------|-----|---------------|-----|-----------------|-----|
| NYC          | JFK/EWR       | 32               | 21  | 27            | 18  | 17              | 12  |
| Miami        | MIA           | 53               | 55  | 31            | 31  | 46              | 38  |
| Orlando      | MCO           | 31               | 4   | 35            | 20  | 21              | 9   |
| Ft Laud.     | FLL           | 2                | 1   | 5             | 6   | 7               | 13  |
| Los Angeles  | LAX           | 6                | 4   | 6             | 5   | 7               | 7   |
|              |               |                  |     |               |     |                 |     |



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