



Office of Travel and Tourism Industries

# 2008 Industry Sector Profile: Lodging



## Did You Know...?

- *Overseas hotel/motel visitors are nearly five times more likely to use a personal computer to plan their trip now than they were in 1998 (42.7% vs. 8.7%).*
- *More overseas hotel/motel visitors book their lodging directly with the hotel/motel now compared with ten years ago which comes at the expense of travel agents.*
- *Overseas hotel/motel visitors are visiting theme/amusement parks and participating in golfing or tennis less now than ten years ago.*
- *Overseas hotel/motel visitors are using rail more now than ten years ago, while they are using car rentals and airlines in the U.S. less.*

## Overseas Travelers Who Stayed in a Hotel/Motel (2008)

In 2008 just over 20 million, or 79% of the 25.3 million, overseas visitors to the United States stayed in a hotel/motel. The top origin markets were the United Kingdom, Japan, Germany, France, and Italy. All showed gains over 2007 except for Japan.

The top five destination states for overseas travelers who stayed in a hotel/motel were New York, California, Florida, Nevada, and the Hawaiian Islands.

The top five destination cities were New York City, Los Angeles, San Francisco, Las Vegas, and Orlando.

The majority of overseas visitors who stayed in a hotel/motel (55%) traveled to the United States primarily for leisure which is slightly

more than the average overseas traveler (49%). More than 25% stated that their main purpose of the trip was for business travel; visiting friends/relatives accounted for 9% of overseas visitors who stayed in a hotel/motel. Some international

trips, however, are dual purpose (e.g., primarily here for business, but also visited friends and relatives (VFR) while in the United States). When taken together (net purpose of trip),

leisure and VFR account for more than 91% of all hotel/motel arrivals, while business and convention trips account for 39%, compared to all overseas visitors 79% and 30%, respectively).

[...continued.](#)





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In addition, when compared to the average overseas traveler, those who stayed in a hotel/motel are:

- More likely to visit only one destination while in the United States and less likely to visit two or more.
- More likely to use a company or private car, and/or railroad between cities.
- More likely to participate in these activities: Amusement/theme parks, attend sports events, camping/hiking, environmental/eco excursions, and golfing/tennis.
- More likely to have made their travel plans up to 30 days in advance and less likely to have done so 31 days or more in advance.
- More likely to stay eight or more nights and less likely to stay 1-7 nights.
- More likely to take between 2-3 trips to the U.S. and less likely to take four or more trips to the US per year.

### Did You Know...?

- *About a third (34%) rented an auto, also more than the average overseas traveler, and just under a fifth (19%) used a company or private auto, which was less than the average overseas traveler.*
- *Almost half (48%) of all hotel/motel visitors used a taxi, cab, or limousine as a form of transportation once in the United States, more than the average overseas traveler.*
- *Overseas hotel/motel visitors continue to be majority male, but the number of women hotel/motel visitors has been increasing over the last ten years. Women now make up nearly 40% of overseas hotel/motel visitors.*



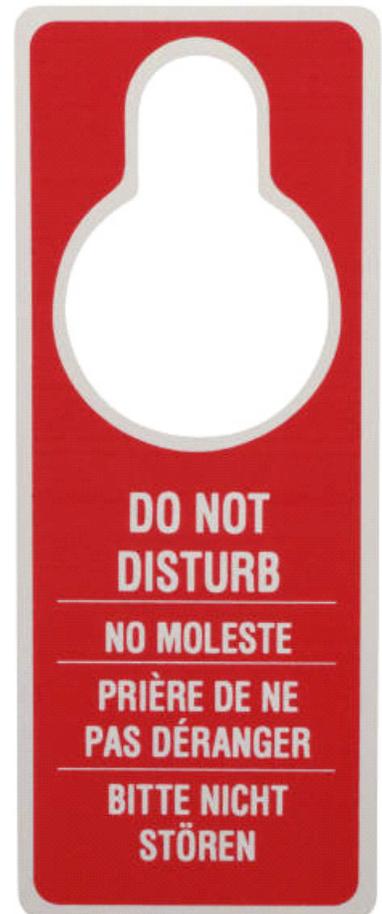
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## 2008 Industry Sector Profile: Lodging



Additionally, when compared to the average overseas traveler, those who stayed in a hotel/motel are:

- More likely to arrive at the following ports of entry: Atlanta, Dallas, Houston, and Miami; and less likely to arrive at the following ports of entry: Chicago, Boston, Detroit, Honolulu, Philadelphia, San Francisco, Seattle and Washington DC.
- More likely to use debit cards and cash to make payments and less likely to use credit cards and travelers checks.
- More likely to be between the ages of 18-24 and over 65.
- Less likely to have used a tour package than the average overseas traveler.
- Less likely to travel overseas in business class than the average overseas traveler.
- Less likely to participate in casinos/gambling and guided tours.
- Less likely to use a city subway/ tram/bus, rented car or taxi/cab/ limousine.



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## Overseas Visitors Using Hotels/Motels

[thousands of visitors]	2001	2002	2003	2004	2005	2006	2007	2008	Change 2008/2001
Overseas Visitors	13,934	14,911	13,898	16,034	16,974	16,945	18,755	20,045	6,111
% Change	-34%	7%	-7%	15%	6%	0%	11%	7%	44%
Share of Overseas Visitors	76.9%	78.0%	77.1%	78.9%	78.3%	78.2%	78.5%	79.1%	2pts.
Point Change in Share	-5%	1%	-1%	2%	-1%	0%	0%	1%	3%

## Country of Origin of Visitors Using Hotels/Motels

	Market Share 2007	Volume 2007 (000)	Market Share 2008	Volume 2008 (000)
<b>WORLD REGIONS</b>				
Europe	50.3%	9,434	55.2%	11,065
Western Europe	49.2%	9,227	54.2%	10,864
Asia	31.7%	5,945	28.4%	5,693
South America	7.6%	1,425	7.4%	1,483
Oceania	4.2%	788	3.8%	762
Central America	2.0%	375	1.5%	301
Caribbean	1.8%	338	1.2%	241
<b>COUNTRIES OF RESIDENCE</b>				
United Kingdom	21.8%	4,089	22.0%	4,410
Japan	20.9%	3,920	18.4%	3,688
Germany	6.9%	1,294	8.1%	1,624
France	4.1%	769	5.1%	1,022
Italy	2.9%	544	3.5%	702
Australia	3.4%	638	3.2%	641
Brazil	2.6%	488	3.0%	601

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

Information Sources Used (multiple response: top 4 of 12)	2007	2008	% Point Change (2)
Personal Computer	39%	43%	3 pts.
Travel Agency	45%	41%	-4 pts.
Airlines Directly	17%	18%	1 pt.
Friends/Relatives	12%	13%	1 pt.

## Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2007	2008	% Point Change (2)
Leisure/Recreation/Holidays	53%	55%	3 pts.
Business/Professional	28%	25%	-3 pts.
Visit Friends/Relatives	10%	9%	0 pts.
Convention/Conference	6%	7%	0 pts.

## All Purposes of Trip

Purpose of Trip (multiple response--top 4 of 8)	2007	2008	% Point Change (2)
Leisure/Recreation/Holidays	65%	68%	3 pts.
Business/Professional	32%	29%	-3 pts.
Visit Friends/Relatives (VFR)	22%	23%	1 pt.
Convention/Conference	10%	10%	0 pts.
NET PURPOSES OF TRIP:			
Leisure & VFR	38%	35%	-3 pts.
Business & Convention	73%	76%	3 pts.

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## Transportation Used in United States by Those Using Hotel/Motels

Transportation Types Used in United States (multiple response--top 5 of 8)	2007	2008	% Point Change (2)
Taxi/Cab/Limousine	49%	48%	-1 pt.
Rented Auto	33%	34%	1 pt.
City Subway/Tram/Bus	25%	28%	3 pts.
Airlines in U.S.	27%	26%	-1 pt.
Company or Private Auto	19%	19%	0 pts.

## Activity Participation While in the United States

Activity Participation While in the U.S. (multiple response--top 10 of 25)	2007	2008	% Point Change (2)
Shopping	87%	88%	1 pt.
Dining in Restaurants	87%	87%	0 pts.
Sightseeing in Cities	44%	46%	2 pts.
Visit Historical Places	35%	38%	3 pts.
Amusement/Theme Parks	24%	26%	2 pts.
Visit Small Towns	23%	26%	3 pts.
Cultural Heritage Sites	20%	23%	3 pts.
Water Sports/Sunbathing	21%	23%	2 pts.
Art Gallery/Museum	21%	22%	1 pt.
Guided Tours	20%	20%	0 pts.

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## Select Traveler Characteristics of Those Using Hotel/Motels

Traveler Characteristics	2007	2008	Change (2)
Advance Trip Decision Time (mean days)	82	90	8 days
Advance Trip Decision Time (median days)	60	60	0 days
Prepaid Package	21%	20%	-1 pt.
First International Trip to the U.S.	22%	25%	2 pts.
Length of Stay in U.S. (mean nights)	11.9	12.7	1 night
Length of Stay in U.S. (median nights)	7.0	7.0	0 nights
Number of States Visited (% 1 state)	65%	63%	-2 pts.
Average Number of States Visited	1.6	1.6	0 states
Hotel/Motel (% 1+ nights)	100%	100%	0 pts.
Average # of Nights in Hotel/Motel	7.9	8.3	0 nights
Travel Party Size (mean # of persons)	1.6	1.7	0.1
Gender: % Male (among adults)	62%	62%	0 pts.
Household Income (mean average)	\$103,500	\$107,100	\$3,600
Household Income (median average)	\$91,900	\$96,900	\$5,000
Average Age: Female	39	39	0 years
Average Age: Male	43	42	0 years



# 2008 Industry Sector Profile: Lodging

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

Visitation to U.S. Destinations/Regions (3)	Market Share 2007	Volume 2007 (000)	Market Share 2008	Volume 2008 (000)
<b>REGIONS</b>				
Middle Atlantic	35.6%	6,677	36.7%	7,357
South Atlantic	26.2%	4,914	28.3%	5,673
Pacific	25.7%	4,820	25.1%	5,031
Mountain	13.2%	2,476	14.5%	2,907
East North Central	8.8%	1,650	9.0%	1,804
New England	6.3%	1,182	6.7%	1,343
West South Central	4.9%	919	5.3%	1,062
West North Central	2.2%	413	2.0%	401
<b>STATES</b>				
New York	32.1%	6,020	33.1%	6,635
California	24.2%	4,539	23.5%	4,711
Florida	18.0%	3,376	18.7%	3,748
Nevada	10.1%	1,894	11.0%	2,205
Hawaiian Islands	10.4%	1,951	9.0%	1,804
Illinois	5.7%	1,069	6.0%	1,203
Guam	* *	* *	5.8%	1,163
Massachusetts	5.0%	938	5.3%	1,062
Texas	4.0%	750	4.3%	862
Pennsylvania	3.4%	638	3.8%	762
Arizona	3.0%	563	3.5%	702
New Jersey	3.4%	638	3.5%	702
Georgia	* *	* *	2.7%	541
Washington	2.1%	394	2.0%	401

...cont'd.

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

Visitation to U.S. Destinations/Regions (3)	Market Share 2007	Volume 2007 (000)	Market Share 2008	Volume 2008 (000)
<b>CITIES</b>				
New York City	31.2%	5,852	32.5%	6,515
Los Angeles	12.4%	2,326	12.5%	2,506
San Francisco	11.3%	2,119	12.5%	2,506
Las Vegas	9.9%	1,857	10.7%	2,145
Orlando	9.2%	1,725	10.4%	2,085
Miami	9.0%	1,688	8.9%	1,784
Oahu-Honolulu	8.8%	1,650	7.9%	1,584
Washington, DC	5.6%	1,050	6.4%	1,283
Chicago	5.5%	1,032	5.7%	1,143
Boston	4.6%	863	4.8%	962
San Diego	3.4%	638	3.4%	682
Philadelphia	2.5%	469	2.8%	561
Anaheim	2.3%	431	1.8%	361
Seattle	1.9%	356	1.8%	361
San Jose	2.2%	413	1.7%	341

- (1) Overseas includes all countries except 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.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: <http://tinnet.ita.doc.gov/research/programs/ifs/index.html>.

U.K. includes residents of England, Scotland, Wales, and Northern Ireland.

For a list of the states that comprise each census region, please visit: [http://tinnet.ita.doc.gov/outreachpages/census\\_regions.html](http://tinnet.ita.doc.gov/outreachpages/census_regions.html).

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries.

Publication Date: July 2009

## Survey of International Air Travelers

The Survey of International Air Travelers (or “In-Flight” survey) 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-five 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 visits the United States.

### Survey of International Air Travelers: Table Number and Description

Table 1	Country of Residence	Table 19	Number of States Visited
Table 2	Advance Trip Decision	Table 20	Number of Destinations Listed
Table 3	Advance Airline Reservation	Table 21	Transportation in U.S.
Table 4	Means of Booking Air Trip	Table 22	Port of Entry
Table 5	Information Sources	Table 23	Main Destination
Table 6	Use of Package	Table 24	U.S. Destinations Visited
Table 7	Use of Prepaid Lodging	Table 25	Leisure Activities
Table 8	Advance Package Booking	Table 26	Total Trip Expenditures
Table 9	Pre-Booked Lodging	Table 27	Itemized Trip Expenditures
Table 10	Travel Companions	Table 28	Trip Expenses Payment Method
Table 11	Travel Party Size	Table 29	Factors in Airline Choice
Table 12	Main Purpose of Trip	Table 30	Main Factor in Airline Choice
Table 13	Purpose of Trip	Table 31	Type of Airline Ticket
Table 14	Type of Accommodation	Table 32	Seating Area
Table 15	Nights in the U.S.	Table 33	Gender & Age of Traveler
Table 16	First Int'l U.S. Trip	Table 34	Occupation
Table 17	U.S. Trips Last 12 Months	Table 35	Annual Household Income
Table 18	U.S. Trips Last 5 Years		



# Custom Reports Available for Hotel/Motels

The Office of Travel and Tourism Industries (OTTI) survey data on overseas travelers to the United States can be segmented to focus on travelers who stayed in a hotel/motel. Although OTTI surveyed over 37,000 overseas and Mexican air travelers to the country in 2008, there may be limitations due to sample size.

## Possible Subsets Available:

- 1) All overseas travelers who used a hotel/motel – (the big picture ).
- 2) Countries of origin staying in hotels/motels (United Kingdom, Japan, Germany, etc.).
- 3) Visitors who stayed in a hotel while on a business trip, leisure trip, or some combination thereof.
- 4) Visitors to a specific region, state or city who stayed in a hotel/motel
- 5) Visitors who used a specific brand (Marriott, Hilton, Hyatt, etc.) <sup>(1)</sup>
- 6) Any of the other survey table responses.

Custom reports start at \$4,630 for a 12 column (you choose the 12 columns) and 35 tables on travelers who stayed in a hotel/motel. For more info, go to: <http://tinet.ita.doc.gov/research/programs/ifs/customized.html>

*(1) The client's brand data would be compared to its competitive aggregates. Brand data are confidential. All custom reports are developed by OTTI's contractor and sample sizes are checked before OTTI recommends purchasing a report.*

## **U.S. Department of Commerce**

International Trade Administration  
Manufacturing and Services  
Office of Travel and Tourism Industries  
14th & Constitution Ave, NW  
Washington, D.C. 20230  
Phone: (202) 482-0140  
Fax: (202) 482-2887  
[tinet\\_info@mail.doc.gov](mailto:tinet_info@mail.doc.gov)

# <http://tinet.ita.doc.gov>