

U.S. Department of Commerce
International Trade Administration



Office of Travel and Tourism Industries

2012 Sector Profile: Lodging



2012 Industry Sector Profile: Lodging

Overseas Visitors Using Hotels/Motels

[thousands of visitors]	2005	2006	2007	2008	2009	2010	2011	2012	Change 2012/2005
Overseas Visitors ⁽¹⁾	16,974	16,945	18,755	20,045	18,506	20,932	22,111	23,422	6,448
% Change	6	0	11	7	-8	13	6	6	38
Share of Overseas Visitors	78.3	78.2	78.5	79.1	77.9	79.4	79.3	78.7	
Point Change in Share	-0.6	-0.1	0.3	0.6	-1.2	1.5	-0.1	-0.6	0.4

Country of Origin of Visitors Using Hotels/Motels

Visitor Origin	Market Share 2011 (Percent)	Volume 2011 (000)	Market Share 2012 (Percent)	Volume 2012 (000)
WORLD REGIONS				
Europe	46.3	10,237	44.1	10,329
Asia	28.9	6,390	29.8	6,980
South America	14.7	3,250	16.4	3,841
Oceania	5.3	1,172	5.0	1,171
Middle East	1.8	398	1.8	422
Central America	**	**	1.4	328
Caribbean	**	**	0.9	211
Africa	0.6	133	0.6	141
COUNTRIES OF RESIDENCE				
Japan	17.1	3,781	17.3	4,052
United Kingdom	15.7	3,471	14.9	3,490
Brazil	7.6	1,680	7.8	1,827
Germany	6.5	1,437	6.8	1,593
France	5.5	1,216	5.0	1,171
Australia	4.6	1,017	4.3	1,007
Korea, South	4.3	951	4.2	984
P. R. of China	2.9	641	3.6	843
Italy	3.2	708	2.9	679
Argentina	**	**	2.8	656
Spain	2.8	619	2.3	539
Netherlands	**	**	2.2	515
Switzerland	**	**	1.8	422
India	1.6	354	**	**
R. of China (Taiwan)	0.8	177	**	**

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

	Information Sources Used	2011 (Percent)	2012 (Percent)	Point Change (2)
	Airlines (Directly)	21	41	19.8
	Corporate Travel Dept.	8	14	6.1
	Travel Guide(s)	10	15	4.9
2012	Personal Recommendation (Friends/Rel)		24	
2011	Friends/Relatives	15		
2012	National/State/City Travel Office		10	
2011	Nat'l Govt. Tourist Ofc.	2		
2011	State/City Travel Ofc.	3		
2012	Tour Operator/Travel Club		9	
2011	Tour Company	8		
2012	Online Travel Agency (OTA)		31	
2012	Travel Agency Office		27	
2011	Travel Agency	39		
2012	Other		5	
2011	TV/Radio	1		
2011	Personal Computer	47		
2011	In-flight Info. Systems	2		
2011	Newspapers/Magazines	3		

Main Purpose of Trip

	Main Purpose of Trip	2011 (Percent)	2012 (Percent)	Point Change (2)
	Convention/Conference/Trade Show	6	9	3.8
	Visit Friends/Relatives	10	8	-1.9
	Health Treatment	0.2	0.2	0.0
	Religion/Pilgrimages	0.1	0.2	0.1
2012	Business		14	
2011	Business/Professional	19		
2012	Vacation/Holiday		64	
2011	Leisure/Rec./Holidays/Sightseeing	62		
2012	Education		3	
2011	Study/Teaching	3		
	Other	1	1	0.5

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All Purposes of Trip

	Purpose of Trip	2011 (Percent)	2012 (Percent)	Point Change (2)
	Convention/Conference/Trade Show	9	12	3.4
	Visit Friends/Relatives	22	19	-2.7
	Health Treatment	0.4	1	0.1
	Religion/Pilgrimages	0.3	0.4	0.1
2012	Business		18	
2011	Business/Professional	22		
2012	Vacation/Holiday		72	
2011	Leisure/Rec./Holidays/Sightseeing	74		
2012	Education		6	
2011	Study/Teaching	4		
	Other	1	2	0.6
	NET PURPOSES OF TRIP:			
	Leisure & VFR	81	78	-3.3
	Business & Convention	28	27	-1.4

Transportation Used in United States by Those Using Hotel/Motels

	Transportation Types Used in United States	2011 (Percent)	2012 (Percent)	Point Change (2)
	Airlines in U.S.	28	35	6.2
	Bus between Cities	11	18	6.7
	City Subway/Tram/Bus	30	34	4.0
	Company or Private Auto	18	26	8.0
	Railroad between Cities	11	7	-4.0
	Motor Home/Camper	1	1	0.0
	Rented Auto	34	38	4.3
	Taxi/Cab/Limousine	47	40	-7.1
2012	Cruise Ship/River Boat 1+ Nights		4	
2012	Ferry/River Taxi/Short Scenic Cruise		11	
2012	Rented Bicycle/Motorcycle/Moped		3	

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Activity Participation While in the United States

	Activity Participation While in the U.S.	2011 (Percent)	2012 (Percent)	Point Change (2)
	Amusement/Theme Parks	30	28	-2.1
	Art Gallery/Museum	24	29	5.0
	Sporting Event	7	11	4.5
	Camping/Hiking	4	4	0.3
	Casino/Gambling	12	11	-0.9
	Concert/Play/Musical	18	19	1.6
	Environ./Eco. Excursions	3	3	-0.1
	Golfing/Tennis	4	4	0.5
	Guided Tours	21	28	6.4
	Hunting/Fishing	1	1	0.2
	Nightclubs/Dancing	12	15	3.0
	Shopping	89	89	-0.2
	Visit American Indian Communities	3	5	1.3
2012	Cultural / Ethnic Heritage Sites		16	
2011	Cultural Heritage Sites	25		
2011	Ethnic Heritage Sites	4		
2012	Experience Fine Dining		39	
2011	Dining in Restaurants	85		
2012	Sightseeing		79	
2011	Sightseeing in Cities	48		
2012	Snow Sports		1	
2011	Snow Skiing	2		
2012	Small Towns/Countryside		26	
2011	Visit Small Towns/Villages	26		
2011	Touring Countryside	19		
2012	National Parks/Monuments		35	
2011	Visit National Parks	21		
2012	Water Sports		11	
2011	Water Sports/Sunbathing	23		
2012	Visit Historical Locations		28	
2011	Visit Historical Places	42		
2012	Other		2	
2011	Cruises	8		
2011	Ranch Vacations	1		

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Select Traveler Characteristics of Those Using Hotel/Motels

Traveler Characteristics	2011	2012	Change (2)
Advance Trip Decision Time (mean days)	98	97	-0.9
Advance Trip Decision Time (median days)	60	60	0.0
Prepaid Package	21	24	2.8
First International Trip to the U.S.	29	24	-5.4
Length of Stay in U.S. (mean nights)	13.8	13.4	-0.4
Length of Stay in U.S. (median nights)	8	8	0.0
Number of States Visited (% 1 state)	62	66	4.7
Average Number of States Visited	1.7	1.5	-0.2
Hotel/Motel (% 1+ nights)	100	100	0.0
Average # of Nights in Hotel/Motel	8.8	9.3	0.5
Travel Party Size (mean # of persons)	1.7	1.8	0.1
Gender: % Male (among adults)	57	59	2.3
Household Income (mean average)	\$98,200	\$107,620	\$9,420
Household Income (median average)	\$87,500	\$80,000	-\$7,500
Average Age: Female	38	38	-0.3
Average Age: Male	42	42	-0.8



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

Visitation to U.S. Destinations/Regions (3)	Market Share 2011 (Percent)	Volume 2011 (000)	Market Share 2012 (Percent)	Volume 2012 (000)
REGIONS				
Middle Atlantic	37.4	10,428	33.2	9,881
South Atlantic	30.2	8,421	32.0	9,524
Pacific	25.0	6,971	22.8	6,786
Pacific Islands	16.0	4,461	17.6	5,238
Mountain	16.5	4,601	14.6	4,345
East North Central	7.0	1,952	7.1	2,113
New England	6.6	1,840	5.4	1,607
West South Central	5.5	1,534	5.3	1,577
West North Central	2.3	641	2.0	595
East South Central	1.8	502	1.6	476
STATES				
New York	34.7	9,675	30.7	9,137
Florida	20.8	5,800	23.3	6,934
California	23.6	6,580	21.5	6,399
Hawaiian Islands	10.5	2,928	12.5	3,720
Nevada	13.3	3,708	11.9	3,542
Guam	5.4	1,506	5.2	1,548
Illinois	4.7	1,311	5.0	1,488
Massachusetts	5.5	1,534	4.7	1,399
Texas	3.9	1,087	4.0	1,190
Arizona	3.6	1,004	3.3	982
Pennsylvania	3.3	920	3.2	952
New Jersey	3.0	836	2.5	744
Georgia	2.4	669	2.3	685
Colorado	1.8	502	**	**
Washington	1.9	530	1.6	476

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

Visitation to U.S. Destinations/Regions (3)	Market Share 2011 (Percent)	Volume 2011 (000)	Market Share 2012 (Percent)	Volume 2012 (000)
CITIES				
New York City	34.0	9,480	30.1	8,958
Miami	11.2	3,123	12.8	3,809
Los Angeles	14.4	4,015	12.7	3,780
Orlando	11.6	3,234	12.7	3,780
Las Vegas	13.1	3,653	11.6	3,452
San Francisco	11.8	3,290	10.5	3,125
Oahu/Honolulu	8.7	2,426	10.2	3,036
Washington, DC	7.4	2,063	6.4	1,905
Chicago	4.5	1,255	4.8	1,429
Boston	5.1	1,422	4.4	1,309
San Diego	3.2	892	3.0	893
Flagstaff-Grand Canyon-Sedona	2.5	697	2.3	685
Philadelphia	2.3	641	2.2	655
Atlanta	2.1	586	1.9	565
Houston	1.9	530	1.9	565
San Jose	1.6	446	1.5	446

(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: Estimate not shown due to sample size fewer than 400 for this year. This profile shows only a portion of the 35 travel characteristics data in 2011 and the 37 items reported on international arrivals to the U.S. Additional information may be obtained for a fee.

To learn more, please visit our website: <http://tinet.ita.doc.gov/research/programs/ifs/index.html>

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html

Interested in data for your destination? OTTI sells custom reports. To learn more, go to: <http://www.tinet.ita.doc.gov/research/programs/ifs/customized.html>

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis

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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-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 used lodging while visiting 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
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Table 4	Means of Booking Air Trip	Table 22	Port of Entry
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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 38,000 overseas and Mexican air travelers to the country in 2010, 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.) ⁽¹⁾
- 6) Any of the other survey table responses.

Custom reports start at \$5,105 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.

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