



July 24, 2015

U.S. Resident Travel to International Destinations Increased 10 Percent in 2014

Strong Growth in U.S. Outbound Travel from the Pacific States

Subtle Changes in Traveler and Trip Characteristics

The U.S. resident outbound market totaled 68.2 million in 2014, up 11 percent from 2013. Travel to overseas countries (30.8 million) increased six percent, to Canada (11.5 million) up marginally and travel to Mexico (25.9 million), singly the largest outbound market, was up 24 percent.

The top five destination countries visited by U.S. residents in 2014 were: Mexico (25.9 million) and Canada (11.5 million), followed by the overseas countries of the United Kingdom (2.8 million), Dominican Republic (2.7 million) and France (2.1 million). Nine of the top 10 destinations visited by U.S. travelers posted increases in 2014.

The top origin regions/states from which U.S. residents traveled to overseas destinations:

- Middle Atlantic States (New York, New Jersey and Pennsylvania), with a 24 percent share of all U.S. regions, was up one percent compared to 2013.
- South Atlantic States (primarily Florida, Georgia, Virginia, Washington, D.C., Maryland and North Carolina) accounted for 20 percent and travel was up seven percent.
- Pacific States (California and Washington) generated 16 percent of outbound travel and was up 18 percent from 2013.
- West South Central States (mainly Texas) registered a 10 percent share and travel was up two percent.
- Travel from East North Central (primarily Illinois, Ohio and Michigan) accounted for 10 percent and was up eight percent.

U.S. Overseas Traveler and Trip Characteristics:

Select highlights from 2014:

- **Main trip purpose** for vacation/holiday estimated at 51 percent of overseas travelers was up eight percent in volume from 2013. Visiting friends and relatives (VFR) was the second-highest main trip purpose, at 27 percent, and was up in volume seven percent from 2013. **Overall leisure/VFR travel was up seven percent** in 2014. Business travel, as the main purpose of trip, comprised 11 percent of outbound travel; with volume up three percent from 2013. Convention travel was three percent of travel and the number of convention travelers increased nine percent in 2014. **Overall business/convention travel was also up seven percent.**
- The top ten ports of departure for U.S. citizens were New York (JFK), Miami (MIA), Atlanta (ATL), Newark (EWR), Los Angeles (LAX), Chicago (ORD), Washington (IAD), San Francisco (SFO), Houston (IAH) and Boston (BOS) which accounted for 76 percent of U.S. departures.

- Advance trip decision time and airline reservation time held at an average of 98 days and 68 days prior to departure, respectively, in 2014 compared to 2013.
- As an information source for trip planning, airlines were most used (51 percent), along with online travel agencies (OTA) (31 percent) and conventional travel agencies (18 percent). More than a third of travelers booked directly through the airlines (38 percent), a majority booked indirectly via either an Internet booking service (29 percent) and/or a travel agency (21 percent).
- Pre-paid package usage decreased one percentage point to 12 percent of U.S. travelers.
- The average length of trip (number of nights) outside the United States decreased slightly to 17.1 nights in 2014.
- Eight percent of travelers were on their first international trip, up one point from 2013, meaning repeat travelers decreased slightly. The average number of international trips taken by U.S. travelers in the last 12 months was 2.6, about the same as in 2013.
- The number of destinations visited averaged 1.8 in 2014. The percentage visiting only one destination increased to 57 percent, and those visiting three or more destinations decreased from 23 percent to 20 percent in 2014.
- Travel party size increased from 1.5 to 1.6.
- The modes of inter-city transportation used by U.S. travelers between destinations overseas were airline (66 percent, up from 64 percent in 2013), bus (21 percent), and railroad (14 percent). The top modes of intra-city transit were taxicab/limo (31 percent) and subway/tram/bus (21 percent). The use of private and/or rented autos was 39 percent and 11 percent, respectively. Five percent traveled on cruise/river boat for overnight trips. Seven percent took short scenic cruises or used a ferry/river taxi.
- Top leisure activities for U.S. travelers were sightseeing, shopping, visiting small town/countryside, visiting historical locations, experiencing 'fine dining' (gastronomy), taking guided tours, visiting art galleries/museums, experiencing cultural/ethnic heritage sites and visiting national parks and monuments.
- Average international airfare per visitor, per trip, was \$1,347 USD, down two percent from 2013, and average expenditures (travel payments) per visitor, per trip, while overseas were \$1,484, down five percent from 2013. The usage of credit cards increased to 55 percent. Cash brought from home and cash withdrawn from an ATM using credit/debit cards and purchases using debit cards composed 45 percent.
- Airfare and convenient schedules were main factors in airline choice. Over 82 percent 'paid' for the ticket without the use of awards, upgrades or deeply discounted fares. Seventy eight percent flew in coach or economy class.
- Travel insurance was purchased for the trip by 28 percent of respondents, the same as 2013
- Twelve percent visited a health care provider in advance of their trip, the same as in 2013.

Demographic Data:

- Fifteen percent of respondents identified themselves as Hispanic. Sixteen percent identified as Asian, eight percent as Black, and three percent as American Indian/Alaskan Native or Hawaiian Islander. Fifty-eight percent of U.S. citizens who visited Asia in 2014 identified themselves as Asian. Fifty-five percent of those visiting South America had identified as Hispanic.
- Females composed slightly over half of U.S. travelers to overseas. The number of women travelers continues to increase. (In 2000 women were 39 percent of U.S.

outbound.) The average age of male travelers was 45.4, up from 2013; female travelers averaged 44.0 years, slightly up from 2013.

- Average household income was \$123,000, the same as in 2013. First time traveler households reported \$93,000 and repeat traveler households reported \$128,000 annual income. Seven percent of traveler households earned \$300,000 or more. Business and convention travelers earned an average \$157,000.

Top Outbound Destination Markets

Mexico

Mexico was the top U.S. international destination again in 2014 with a record setting 25.9 million travelers, up 24 percent from 2013. According to Banco de Mexico ‘Tourist’ (non-border) travel increased 11 percent in 2014 compared to 2013. However, those who traveled across the border for 1+ nights increased 41 percent. Longer-haul travel by air totaled 6.9 million, and was up 11 percent from 2013. With the exception of ‘Border only 1+ nights,’ which spiked in 2014, travel to Mexico has remained relatively stable over the last 10 years. The strongest growth periods were in 2008, 2010, 2013 and 2014.

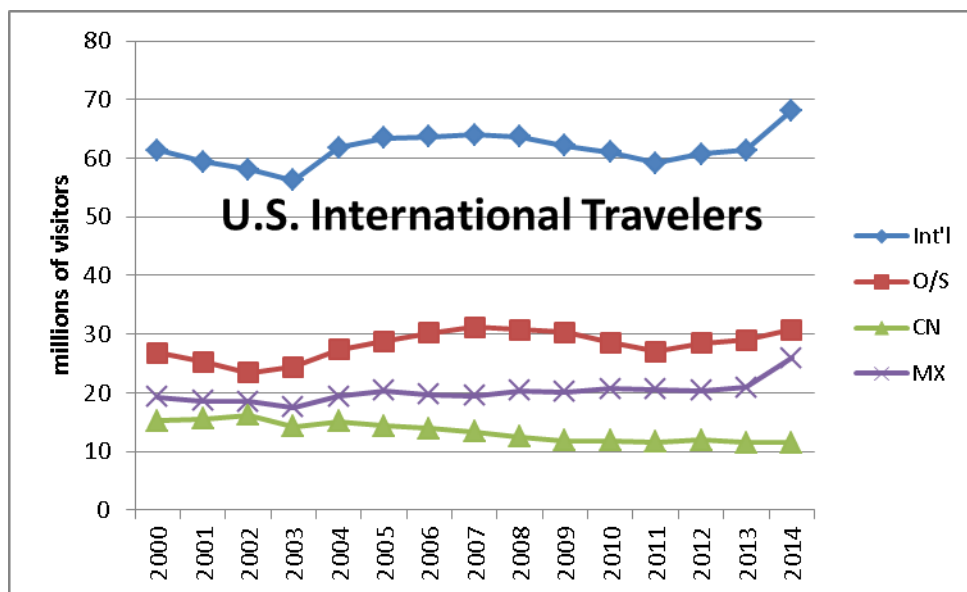
Canada

Canada continues to be the second-most visited country by U.S. travelers. In 2014, 11.5 million U.S. travelers visited Canada, up less than one percent from 2013. Longer haul travel, by air (3.4 million), was up six percent. The peak year for U.S. travel to Canada was in 2002 with 16.2 million U.S. travelers. Since then, U.S. travel to Canada has declined in five of the last 10 years.

Overseas

In 2014, 30.8 million U.S. travelers visited overseas markets, an increase of six percent from 2013.

Travel was up in seven of the top ten overseas markets: the United Kingdom, France, Italy, Germany, Spain, China, India and Philippines/Netherlands (tied). Visitation to Jamaica, Japan and Ireland was down.



For more detailed information, please go to the Outbound Overview page on NTTO's website, which contains links to in-depth information on the outbound market:

http://travel.trade.gov/outreachpages/outbound_general_information.outbound_overview.html

In the 2014 outbound section, interested parties will find:

- 2014 Profile of U.S. Resident Travelers Visiting Overseas Destinations. (The profile provides key information on travel patterns, traveler characteristics and spending by U.S. travelers going abroad. Several new tables have been included since the 2012 questionnaire change. In addition, a breakdown is provided on leisure/visiting friends and relatives (VFR) travelers and business/convention travelers.)
- 2014 U.S. to Europe Profile
- 2014 U.S. to Asia Profile
- 2014 U.S. to Overseas Destinations for Business/Conventions Profile
- 2014 U.S. to Overseas Destinations for Leisure/VFR Profile
- Top Destinations Visited by U.S. Resident Travelers 2013-2014
- Top 30 Ports of Departure (to overseas) in 2014 for U.S. Citizens
- Total International Travelers Volume to/from the United States 2005 – 2014
- U.S. Resident Travel to Canada, Mexico and Overseas (Historical 2000 – 2014)
- 10 Year Historical Travel Import Timelines
- Monthly U.S. international non-stop air traffic figures. (While air traffic is not the same as 'visitation,' it does provide a current indication of air traffic flows for U.S. citizen outbound travel.)

In addition to the data available on the web site, parties interested in subscribing to detailed standardized reports and/or customized data can do so by visiting the NTTO web site at:

<http://travel.trade.gov/research/programs/ifs/index.html>

If the information needed is not on the website or in the standard reports sold by NTTO, custom tables and reports are available from the database. Go to:

<http://travel.trade.gov/research/reports/ifs/customized.html>

The Survey data tables and standard national reports can assist the industry in understanding U.S. travelers going abroad. 48 subsets of the data are also available based on 40 questions asked of U.S. outbound travelers.

For additional information or questions, please contact:

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