



INTERNATIONAL  
**T R A D E**  
ADMINISTRATION

# Understanding the Characteristics of International Visitors 2025 Go West Summit

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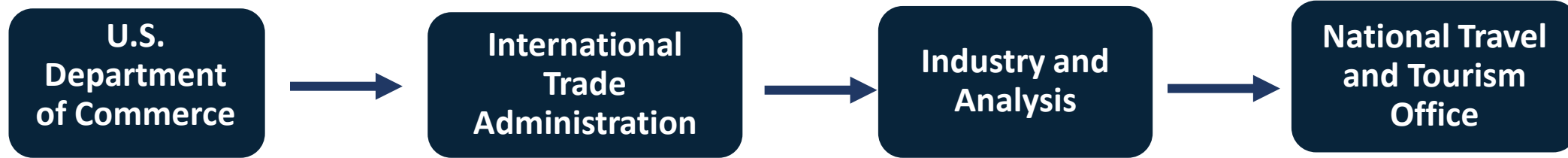
## Session Overview

- Review of NTTO and Its Research Program
- Overview of the State of the Travel and Tourism Industry and International Travel to the United States
- Understanding International Visitors who Go West!



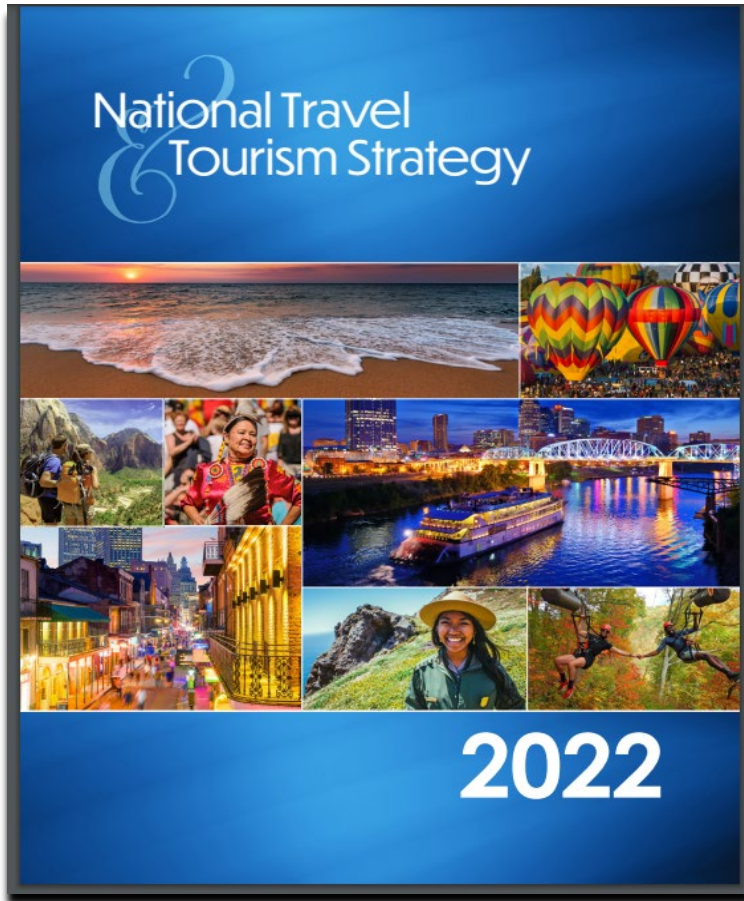
# Review of NTTO and Its Research Program

# Overview of the National Travel and Tourism Office



- Primary point of contact for travel and tourism issues within the federal government
- Conducts research and produces national statistics on travel and tourism
- Coordinates advice to the Secretary from the private sector through the U.S Travel and Tourism Advisory Board
- Serves as Secretariat to Tourism Policy Council and coordinates government-wide activities to support the U.S. travel and tourism industry
- Serves as the principal federal liaison to Brand USA
- Represents U.S. travel and tourism policy interests in international fora, such as G20, UN WTO (non-member), WTTC, OECD, APEC and OAS
- Works cooperatively on Travel and Tourism Team with U.S. Commercial Service

# National Travel and Tourism Strategy



Focuses federal efforts to support travel and tourism in the U.S.

Establishes a five-year goal of attracting **90 million visitors**, who will spend **\$279 billion** annually by 2027

Envisions private and public sectors working together to increase the value and volume of tourism

# NTTO Research (trade.gov/travel-and-tourism-research)

Travel and Tourism Statistics, Research Programs, and Monitors



## International Visitor Arrivals

Explore monthly and annual international visitor arrivals to the United States by their country of residence or citizenship.

NTTO's ADIS I-94 International Visitor Arrivals Program also includes visitation by Visa Type, Mode of Transportation, Age, and First Intended Address.

EXPLORE INTERNATIONAL VISITORS ARRIVALS DATA



## International Traveler Characteristics

View quarterly and annual characteristics of non-U.S. residents visiting the United States (inbound) and U.S. residents visiting world regions and overseas countries (outbound) including: trip planning, travel party size, purposes and activities, destinations visited, spending patterns, and other characteristics primarily based on the Survey of International Air Travelers (SIAT).

VISIT THE SURVEY OF INTERNATIONAL AIR TRAVELERS DATA



## International Travel Receipts and Payments Program

Explore monthly and annual U.S. travel and tourism receipts by international visitors in the United States (exports), payments by U.S. residents abroad (imports), and the balance of trade for major world regions and select countries.

DISCOVER THE MONTHLY TRAVEL TRADE MONITOR



## International Air Passenger Travel

View monthly and annual international air passenger arrivals and departures between U.S. and foreign airports.

NTTO's APIS I-92 International Air Travel Statistics Program provides U.S. citizen and non-citizen air passenger traffic at the airport, city and country level of detail. U.S. international visitor departures are also part of this program.

CHECK OUT THE INTERNATIONAL AIR TRAVEL MONITOR



## Traveler Profiles

Find out who is visiting the United States, what cities they are visiting, and why. NTTO's Country Profile Monitor shows the demographic visitor profiles for more than 70 countries.

EXPLORE THE VISUAL COUNTRY PROFILE MONITOR



## Economic Impact of Travel and Tourism

Measure the economic impact of travel and tourism on the U.S. economy through the Travel and Tourism Satellite Account (TTSA) including: economic output, employment, share of GDP, inflation and demand components.

LEARN MORE ABOUT THE TTSA PROGRAM

# NTTO Research (trade.gov/travel-and-tourism-research)



## NTTO Research Reports

Learn more about the travel and tourism industry through these more in-depth reports.

[EXPLORE NTTO RESEARCH REPORTS](#)



## Forecast of International Visitation to the United States

Track NTTO's latest annual international visitor forecast which estimates international arrivals to the United States from 14 countries and regions. The annual forecast includes visitor volume, annual percent change and share of 2019 visitation as well as a summary report.

[VISIT THE NTTO TRAVEL FORECAST](#)



## NTTO Data Visualizations

Interact with NTTO "Monitors" that cover international visitation, air passenger enplanements, traveler characteristics, state of the travel industry, international trade, top destinations, and country profiles.

[INTERACT WITH NTTO MONITORS](#)

## Fact Sheets



Download the National Travel and Tourism Office's collection of PDF fact sheets and reports. They reflect the latest trends and information on the international travel and tourism industry market.

- U.S. Travel and Tourism Fact Facts
- Top Export Market Rankings

## Discover Travel and Tourism Industry News "TI News"

Sign up to receive Travel and Tourism Industry News "TI News" e-mail updates. Receive updates from NTTO featuring the latest data and research releases, and other information related to international travel to and from the United States right to your inbox!



[DISCOVER TI NEWS](#)



[Meet The Research Team](#)

Discover the faces behind our amazing research team!

[LEARN MORE ABOUT THE RESEARCH TEAM](#)



[Contact Us](#)

Have a question or need assistance? Reach out to our team and we will get back to you as soon as possible.

[GET IN TOUCH !!](#)

# Traveler Profiles

- New Country Profile Monitor Covering 71 Countries

**National Travel and Tourism Office – Select Country Profiles**

Select Country and Year >> United Kingdom 2023

Total SIAT Sample size for 2023 United Kingdom is 4,609

### Travel Volume to/from United Kingdom and the U.S.

Year	Inbound to the U.S.	Annual % Change	Outbound from the U.S.	Annual % Change	Inbound Vol.	Monthly Share	Entry Share
2023	3,898K	12.4%	5,180K	38.3%	2023-01	203.9K	5.2%
2022	3,466K	652.3%	3,746K	396.7%	2023-02	251.8K	6.5%
2021	461K	-36.9%	754K	22.2%	2023-03	300.9K	7.7%
2020	730K	-84.7%	617K	-84.3%	2023-04	351.3K	9.0%
2019	4,780K	2.6%	3,945K	0.3%	2023-05	340.2K	8.7%
					2023-06	276.2K	7.1%
					2023-07	376.9K	9.7%
					2023-08	395.9K	10.2%
					2023-09	357.1K	9.2%
					2023-10	412.7K	10.6%
					2023-11	297.9K	7.6%
					2023-12	332.8K	8.5%

Top Ports of Entry	
New York, NY	883K
Orlando, FL	446K
Los Angeles, CA	261K
Miami, FL	253K
Newark/Etebaro, NJ	181K

Entry to U.S. by Visa Type	
Business	511K
Pleasure	3,358K
Student	28K

### Major Characteristics of United Kingdom Visitors to the U.S. in 2023

Main Purpose of Trip	
Vacation/Holiday	59.6%
Visit Friends/Relatives	24.4%
Business*	8.4%

First Trip to U.S.	
Yes	13.3%
No	86.7%

Top Leisure Activities Engaged	
Sightseeing	81.4%
Shopping	80.2%
National Parks/Monuments	37.1%
Art Galleries/Museums	30.1%
Small Towns/Countryside	29.4%

Type of Transportation Used	
City Subway/Tram/Bus	35.4%
Taxicab/Limousine	32.5%
Auto, Private or Company	32.5%
Ride-sharing Service	24.2%
Air Travel between U.S. Cities	23.6%

### Economic Impact of Travel to/from United Kingdom and the U.S. in 2023

Travel Trade Statistics				
Travel Exports (\$MN) (Incl Intl Airfares)	Travel Imports (\$MN) (Incl Intl Airfares)	Travel Trade Balance (\$MN)	Travel Share of Total U.S. Exports (%)	Average Travel Export Per Arrival
\$13,998M	\$18,156M	(\$4,158M)	8.4%	\$3,592

U.S. Employment Impact from Travel Exports		
U.S. Jobs Supported (Incl Direct & Indirect)	Number of Jobs Supported by One \$Million Spending	Number of Visitors Can Support One U.S. Job
96,200	7	41

\*Estimate unavailable due to small SIAT sample size.

### Top U.S. States and Cities Visited by United Kingdom Visitors in 2023

U.S. States Visited	%	U.S. MSAs Visited	%
New York	32.3%	New York-White Plains-Wayne, NY-NJ MSA	31.6%
Florida	25.3%	Orlando-Kissimmee-Sanford, FL MSA	15.9%
California	16.1%	Las Vegas-Paradise, NV MSA	8.6%
Nevada	8.8%	Los Angeles-Long Beach-Glendale, CA MSA	7.9%
Massachusetts	5.1%	San Francisco-San Mateo-Redwood City, CA MSA	6.0%
Texas	4.6%	Miami-Miami Beach-Kendall, FL MSA	5.7%
District of Columbia	4.5%	DC Metro Area, DC-MD-VA-WV	4.8%
Illinois	3.7%	Boston-Quincy, MA MSA	4.5%
Pennsylvania	2.9%	Chicago-Joliet-Naperville, IL MSA	3.6%
New Jersey	2.8%	Houston-Sugar Land-Baytown, TX MSA	2.6%
Arizona	2.5%	Tampa-St. Petersburg-Clearwater, FL MSA	2.0%
Georgia	2.0%	Philadelphia, PA MSA	1.8%
Washington	1.8%	Anaheim-Santa Ana, CA MSA	1.8%

Source: CIC Research, Inc., DHS/CBP I-94 COR Record, Statistics Canada, INEGI, Survey of International Air Travelers (SIAT) Last Updated: 13Aug2024



# Traveler Profiles

- **Hotel, Car Rental, Domestic Air, Shopping, American Indian Communities, National Parks, etc.**



## Market Profile: Visit American Indian Communities

This market profile contains inbound traveler volume, spending, and select traveler characteristics of overseas visitors who visited an American Indian community during their U.S. visit.

- **Annual visitation trends**
- **Overseas source markets**
- **States and cities visited**
- **Traveler characteristics: purpose of trip, trip planning, activity participation, transportation used in the U.S., port of entry, etc..**

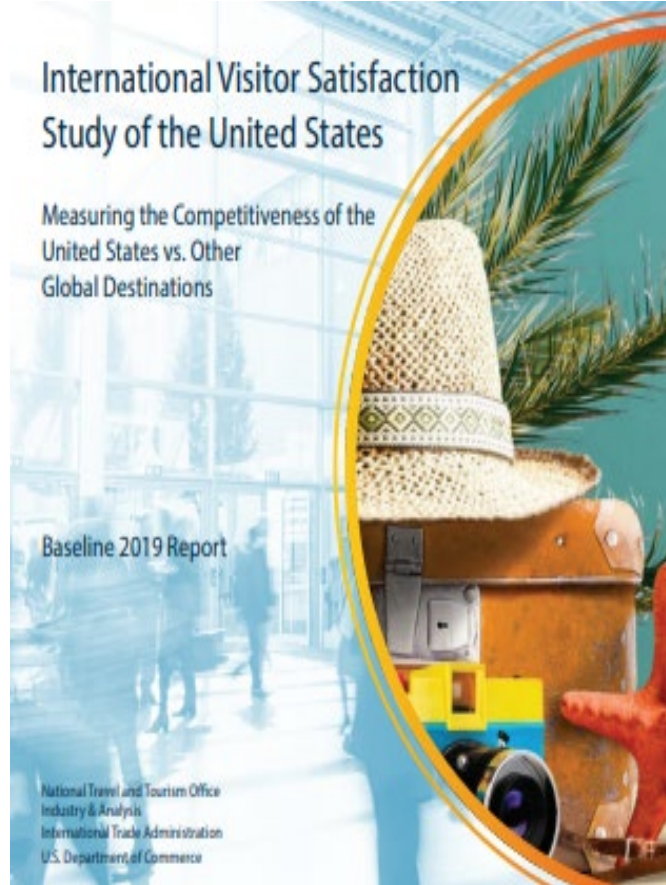
# New and Planned NTTO Research Reports



**Effects of COVID-19 Pandemic on the Travel and Tourism Industry**

The National Travel and Tourism Office prepared the Interim Study and Report to Congress on the Effects of the COVID-19 Pandemic on the Travel and Tourism Industry in the United States in response to the Consolidated Appropriations Act, 2023 (Public Law 117-328).

**READ THE FULL COVID-19 PANDEMIC REPORT**

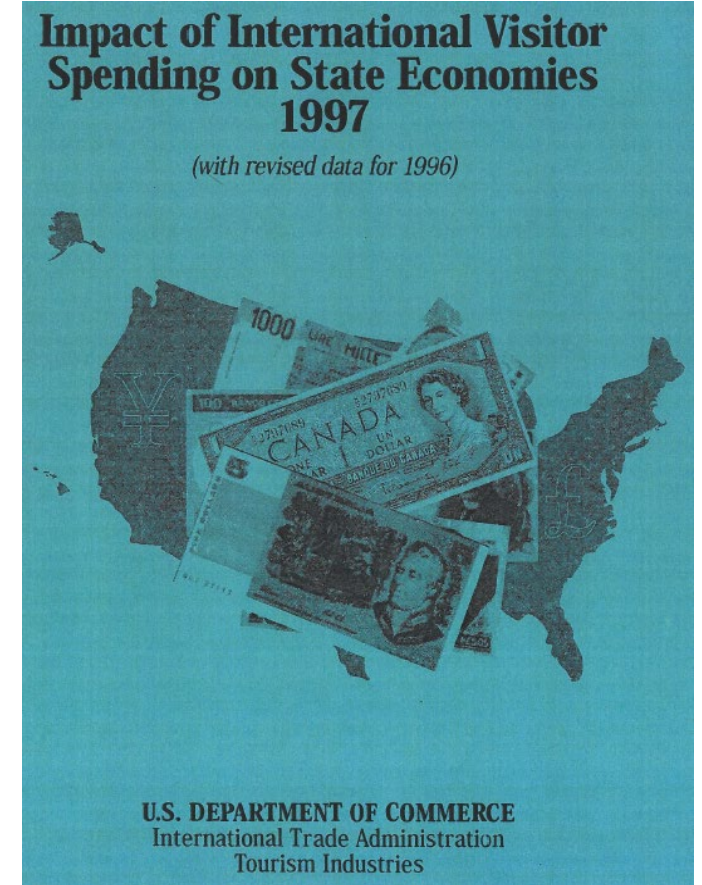


**International Visitor Satisfaction Study of the United States**

Measuring the Competitiveness of the United States vs. Other Global Destinations

Baseline 2019 Report

National Travel and Tourism Office  
Industry & Analysis  
International Trade Administration  
U.S. Department of Commerce



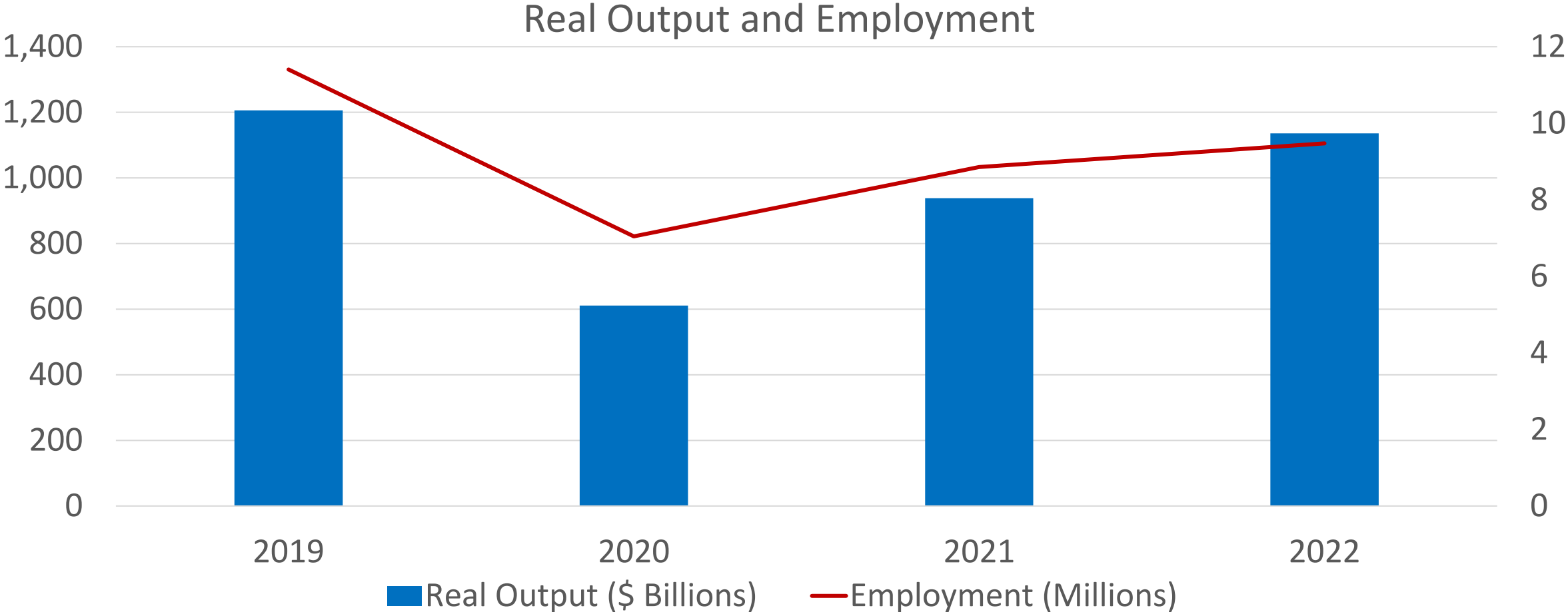
**Impact of International Visitor Spending on State Economies 1997**

*(with revised data for 1996)*

**U.S. DEPARTMENT OF COMMERCE**  
International Trade Administration  
Tourism Industries

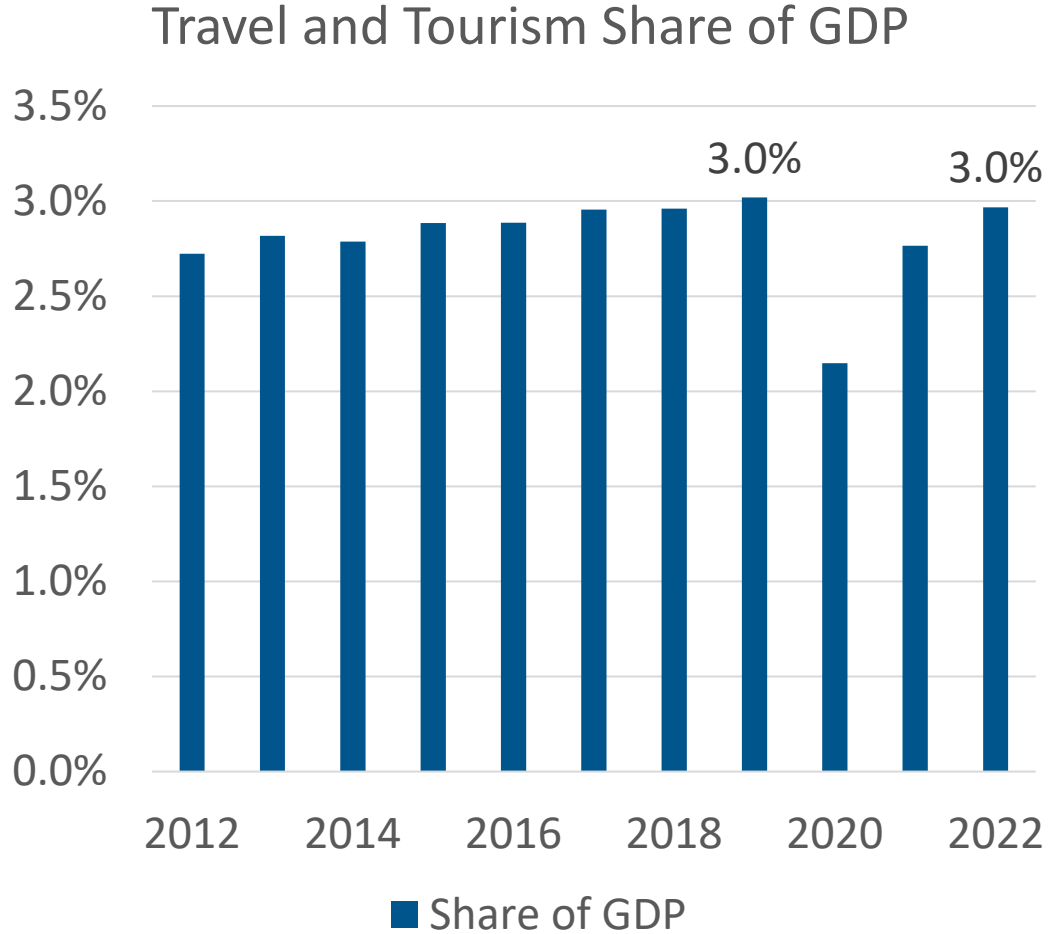
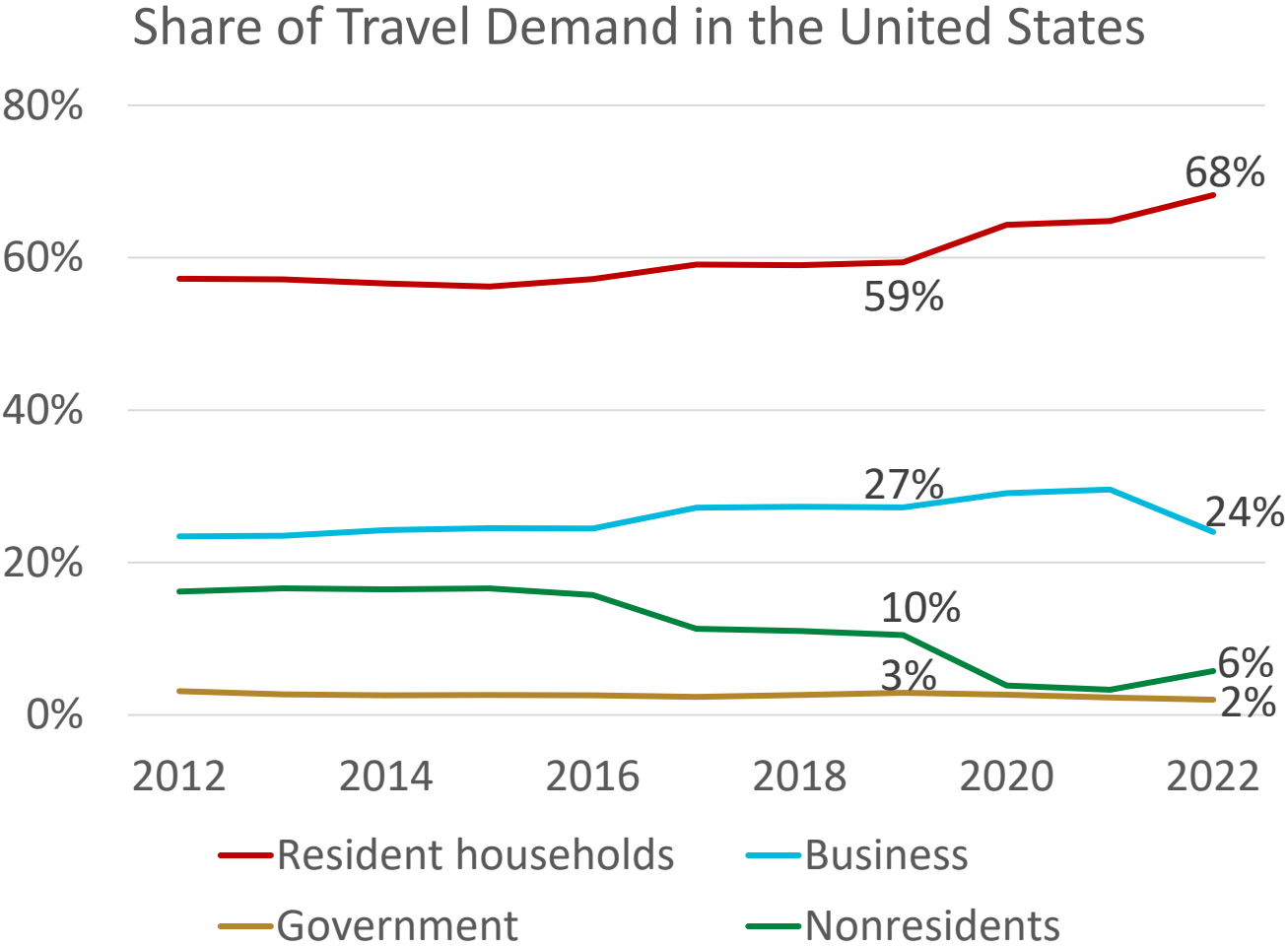
# Overview of the State of the Travel and Tourism Industry and International Travel to the United States

# U.S. Travel and Tourism Industry



TTSA, Bureau of Economic Analysis

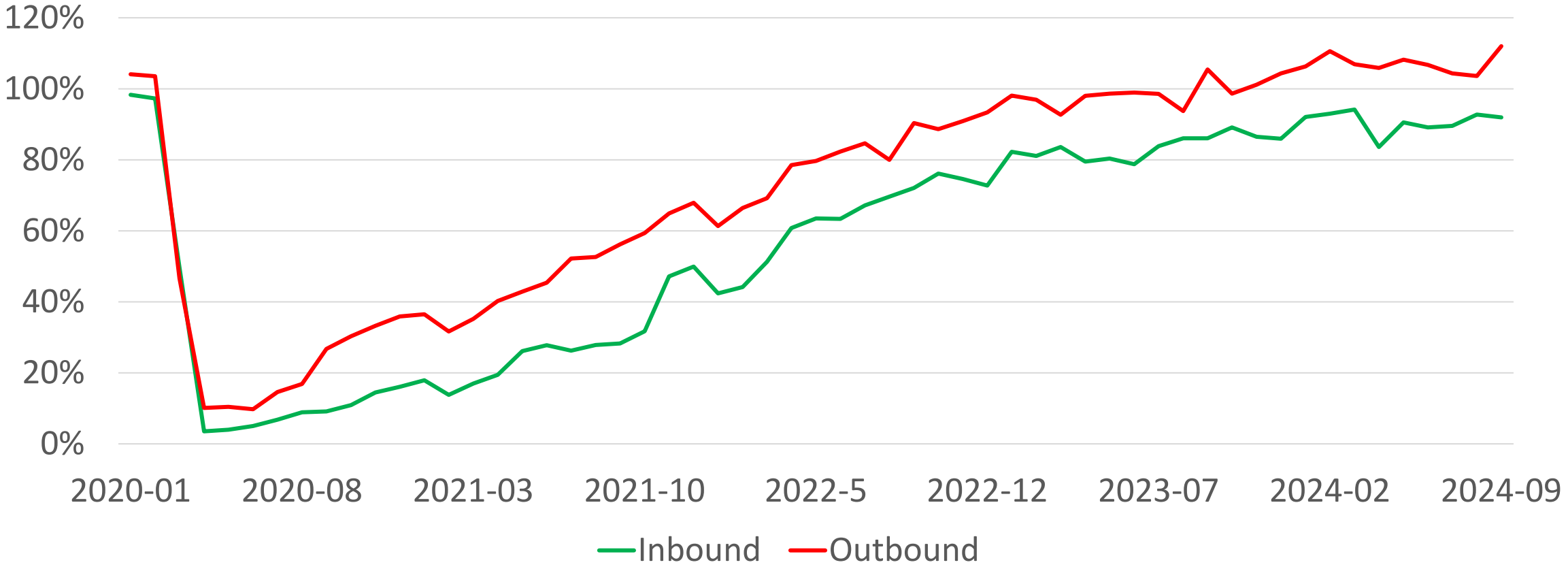
# Travel and Tourism Satellite Account



TTSA, Bureau of Economic Analysis

# Current State of International Travel To/From the United States

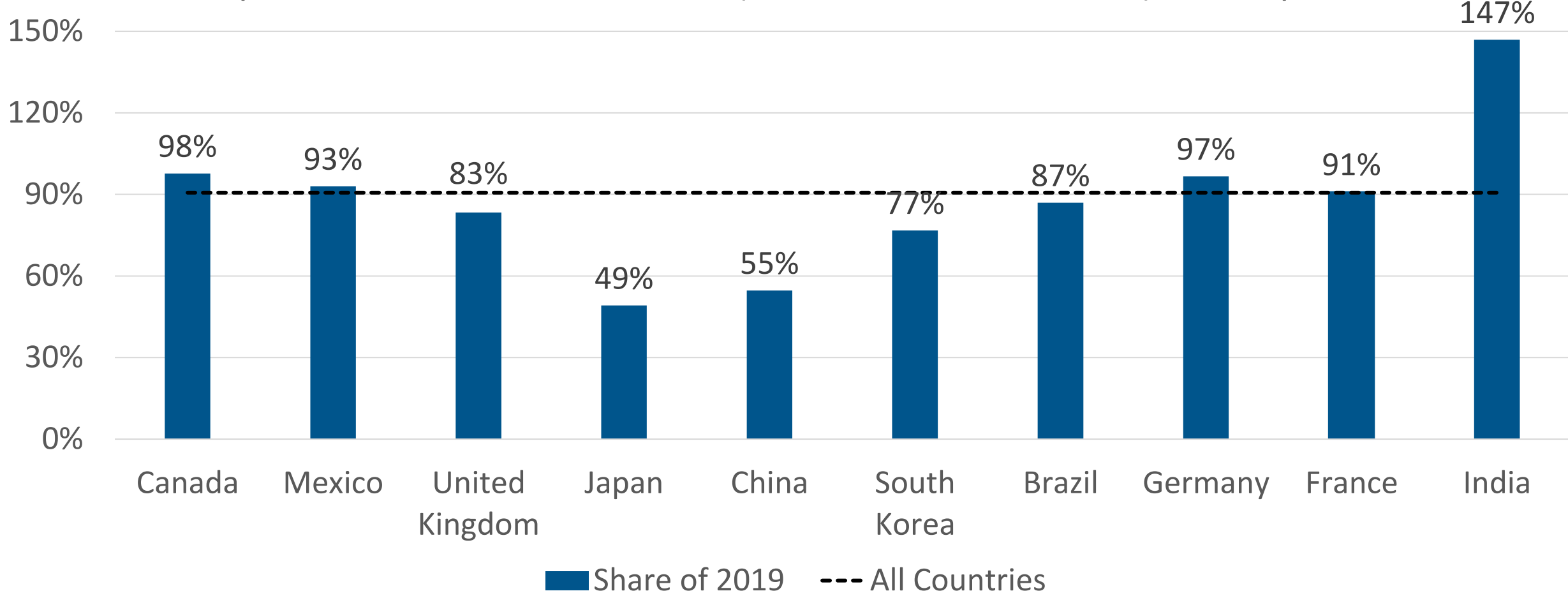
International Visitors To/From the United States  
(share of 2019 monthly visitation)



NTTO, International Trade Administration

# Current State of International Travel To the United States

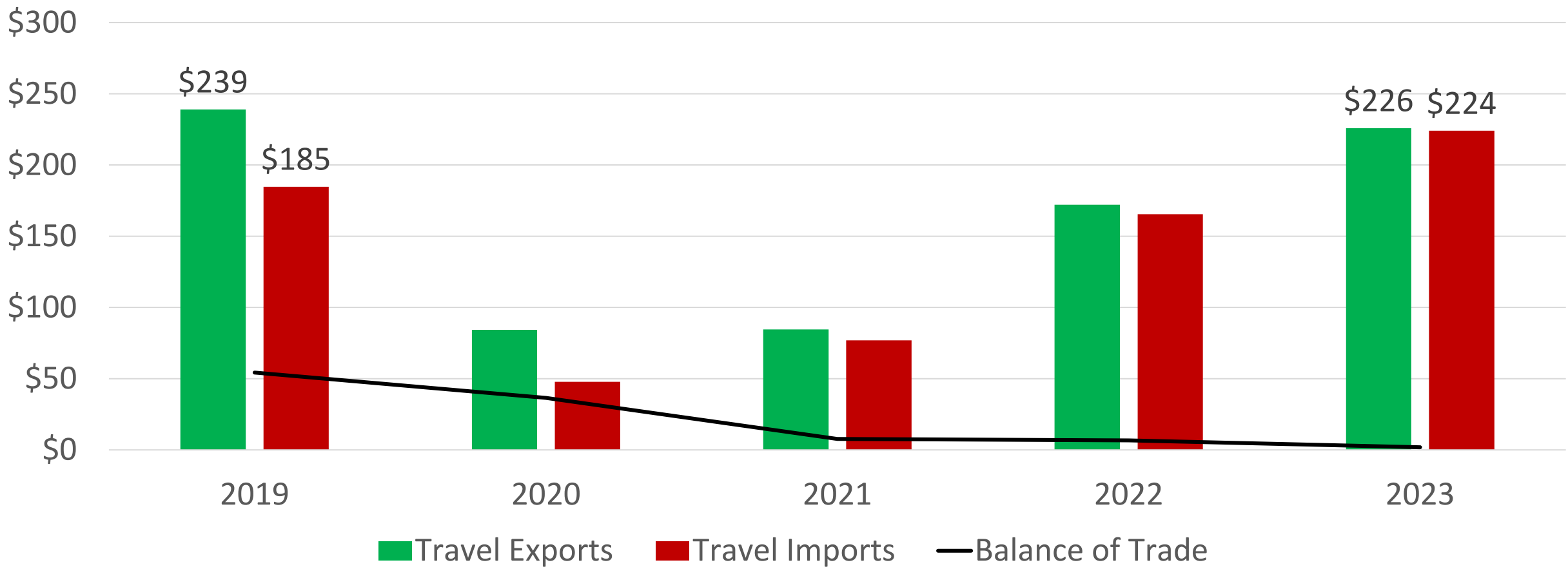
Top 10 Inbound Source Markets (Share of 2019 Visitation), Jan-Sept 2024



NTTO, International Trade Administration

# Current State of U.S. Travel Exports and Imports

\$ Billions



Bureau of Economic Analysis



# NTTO Forecast of International Visitation to the United States



## International Visitor Forecast National Travel and Tourism Office

(Released February 1, 2024)

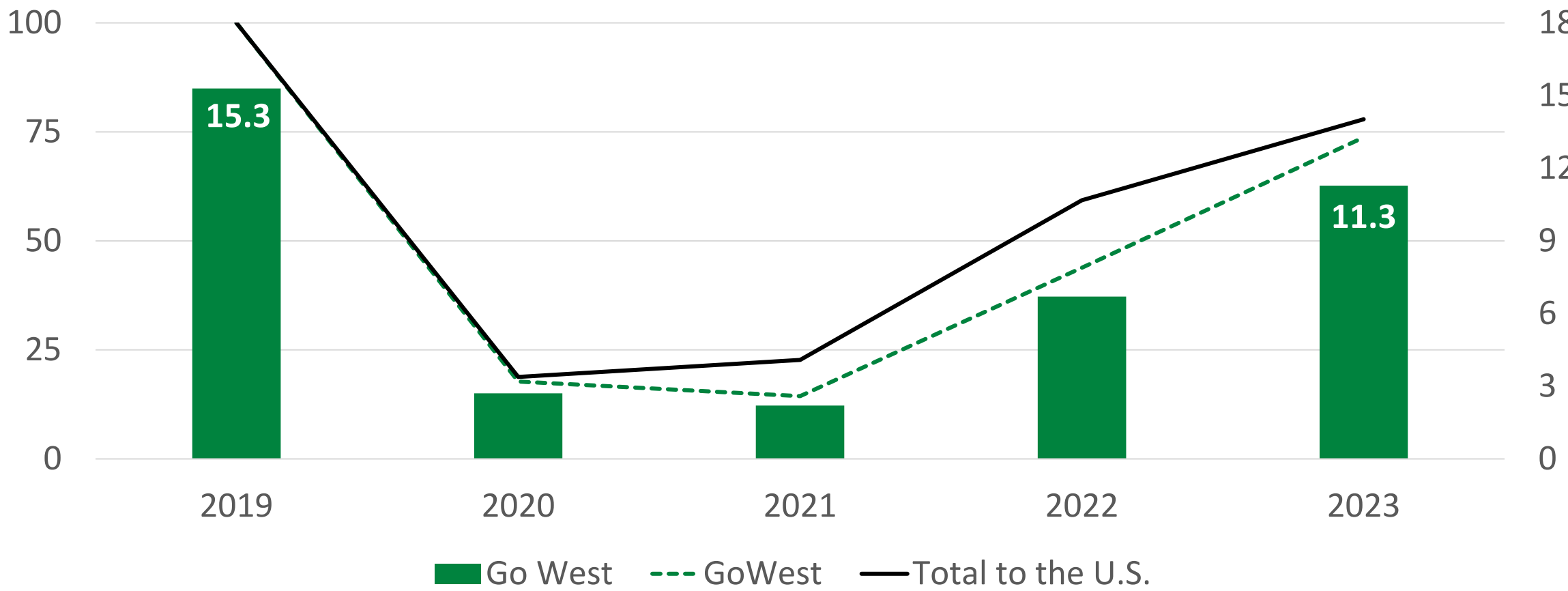
**Forecast Table: International arrivals to the U.S. (Thousands)**

Origin Country	Actual			Forecast				
	2019	2022	2023	2024	2025	2026	2027	2028
<b>Total International</b>	<b>79,442</b>	50,870	66,482	<b>77,679</b>	85,199	91,147	94,621	96,799
<b>Total Overseas</b>	<b>40,393</b>	23,953	31,468	<b>36,998</b>	41,523	44,961	46,925	48,265
<b>India</b>	<b>1,474</b>	1,257	1,762	<b>1,810</b>	1,934	2,067	2,186	2,290
<b>Canada</b>	<b>20,720</b>	14,382	20,514	<b>22,383</b>	23,345	24,428	25,252	25,667
<b>Italy</b>	<b>1,086</b>	718	977	<b>1,028</b>	1,089	1,159	1,213	1,260
<b>Germany</b>	<b>2,064</b>	1,481	1,838	<b>2,064</b>	2,254	2,429	2,539	2,590
<b>France</b>	<b>1,844</b>	1,318	1,593	<b>1,823</b>	1,969	2,089	2,164	2,223
<b>United Kingdom</b>	<b>4,780</b>	3,466	3,898	<b>4,509</b>	4,898	5,204	5,359	5,448
<b>Brazil</b>	<b>2,105</b>	1,225	1,625	<b>2,011</b>	2,248	2,376	2,472	2,551
<b>Mexico</b>	<b>18,328</b>	12,535	14,499	<b>18,298</b>	20,332	21,758	22,444	22,867
<b>Australia</b>	<b>1,319</b>	642	954	<b>1,180</b>	1,350	1,503	1,580	1,611
<b>South Korea</b>	<b>2,298</b>	920	1,600	<b>1,931</b>	2,319	2,580	2,768	2,941
<b>Japan</b>	<b>3,753</b>	597	1,519	<b>2,565</b>	3,345	3,842	4,072	4,180
<b>China</b>	<b>2,830</b>	368	1,078	<b>2,058</b>	2,700	3,170	3,334	3,465

# Understanding International Visitors who Go West!

# Overseas Visitors to Go West States vs. the Overall United States

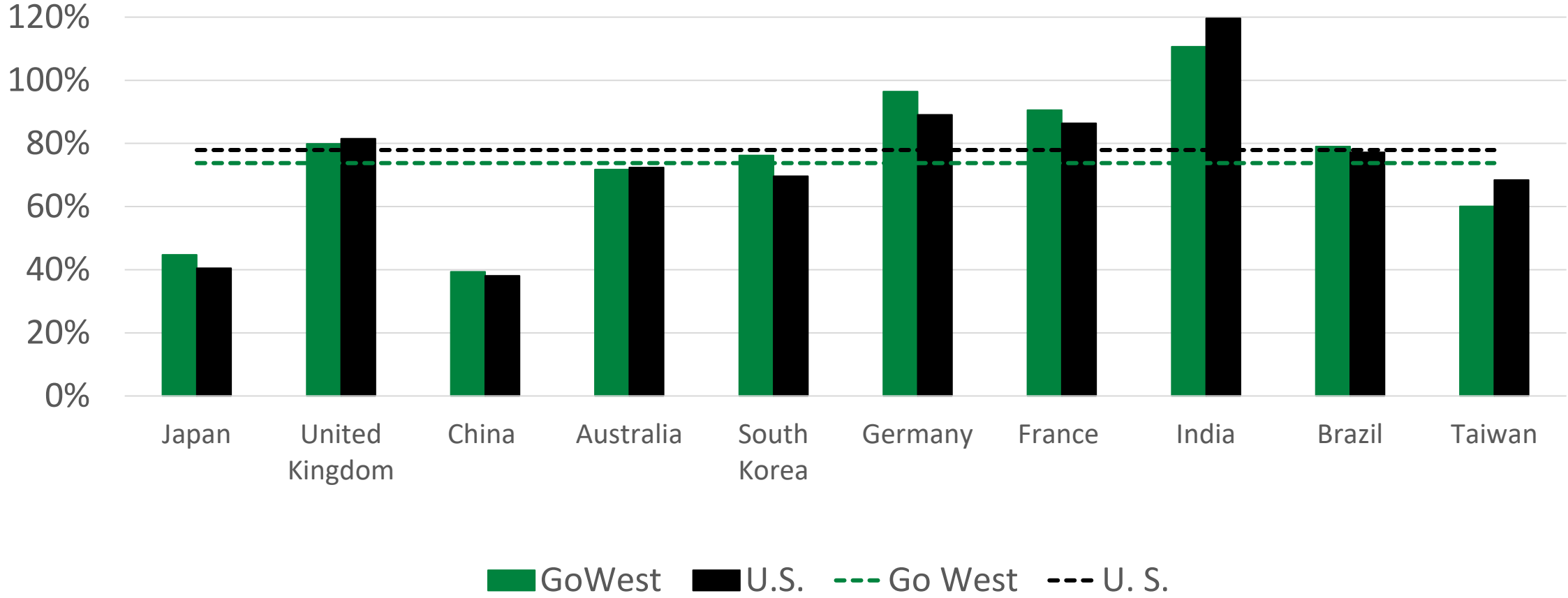
Share of 2019  
Visitation



Source: NTTO

# Top 10 2019 Go West Source Markets State of Recovery in 2023 vs. Overall United States

Share of 2019  
Visitation



Source: NTTO

# Rank of Top Overseas Visitors to Go West States (2019 vs. 2023)

	2019
<b>GoWest</b>	<b>15,289</b>
1 Japan	2,874
2 United Kingdom	1,667
3 China	1,376
4 Australia	1,101
5 South Korea	933
6 Germany	795
7 France	673
8 India	612
9 Brazil	428
10 Taiwan	413
11 Italy	321
12 Spain	260
13 New Zealand	260
14 Netherlands	245
15 Columbia	199
Top Fifteen	12,155
	80%

	2023
<b>GoWest</b>	<b>11,278</b>
1 United Kingdom	1,331
2 Japan	1,286
3 Australia	789
4 Germany	767
5 South Korea	711
6 India	677
7 France	609
8 China	541
9 Brazil	338
10 Italy	293
11 Taiwan	248
12 Spain	237
13 Netherlands	214
14 New Zealand	203
15 Columbia	180
Top Fifteen	8,425
	75%

Source: NTTO

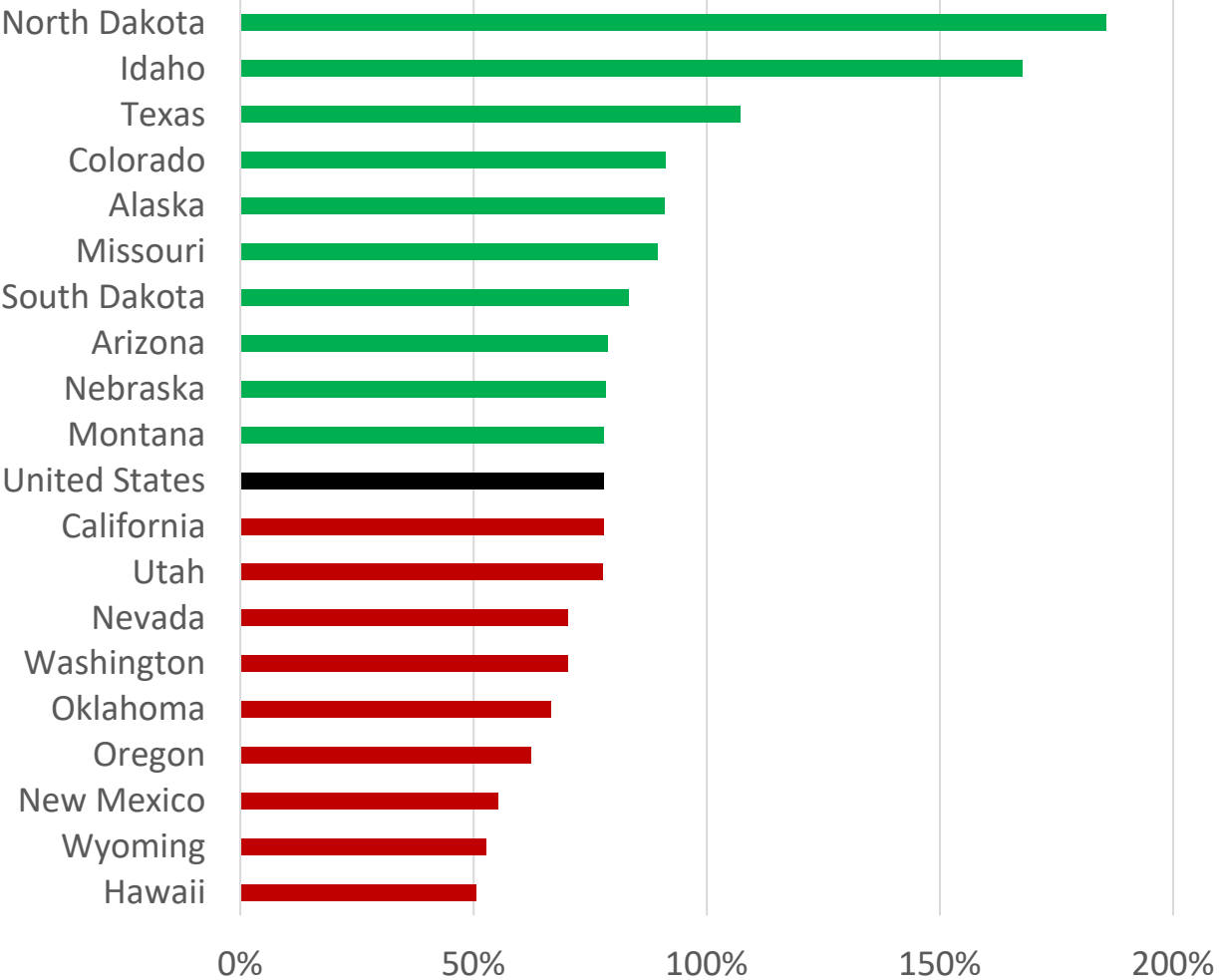
# Go West State Destinations: Distribution of Overseas Visitation in 2019 and 2023

	Overseas Visitors to Go West			Distribution	
	2019	2023		2019	2023
Go West	15,289,000	11,278,000	Go West	100%	100%
California	8,049,000	6,267,000	California	53%	56%
Hawaii	3,298,000	1,667,000	Hawaii	22%	15%
Nevada	3,058,000	2,149,000	Nevada	20%	19%
Texas	1,746,000	1,873,000	Texas	11%	17%
Arizona	1,195,000	941,000	Arizona	8%	8%
Washington	927,000	650,000	Washington	6%	6%
Utah	739,000	574,000	Utah	5%	5%
Colorado	510,000	465,000	Colorado	3%	4%
Oregon	324,000	202,000	Oregon	2%	2%
Wyoming	245,000	129,000	Wyoming	2%	1%
Missouri	171,000	153,000	Missouri	1%	1%
New Mexico	152,000	84,000	New Mexico	1%	1%
Alaska	110,000	100,000	Alaska	1%	1%
Oklahoma	102,000	68,000	Oklahoma	1%	1%
Montana	86,000	67,000	Montana	1%	1%
Nebraska	69,000	54,000	Nebraska	0%	0%
South Dakota	60,000	50,000	South Dakota	0%	0%
Idaho	31,000	52,000	Idaho	0%	0%
North Dakota	14,000	26,000	North Dakota	0%	0%

Source: NTTO

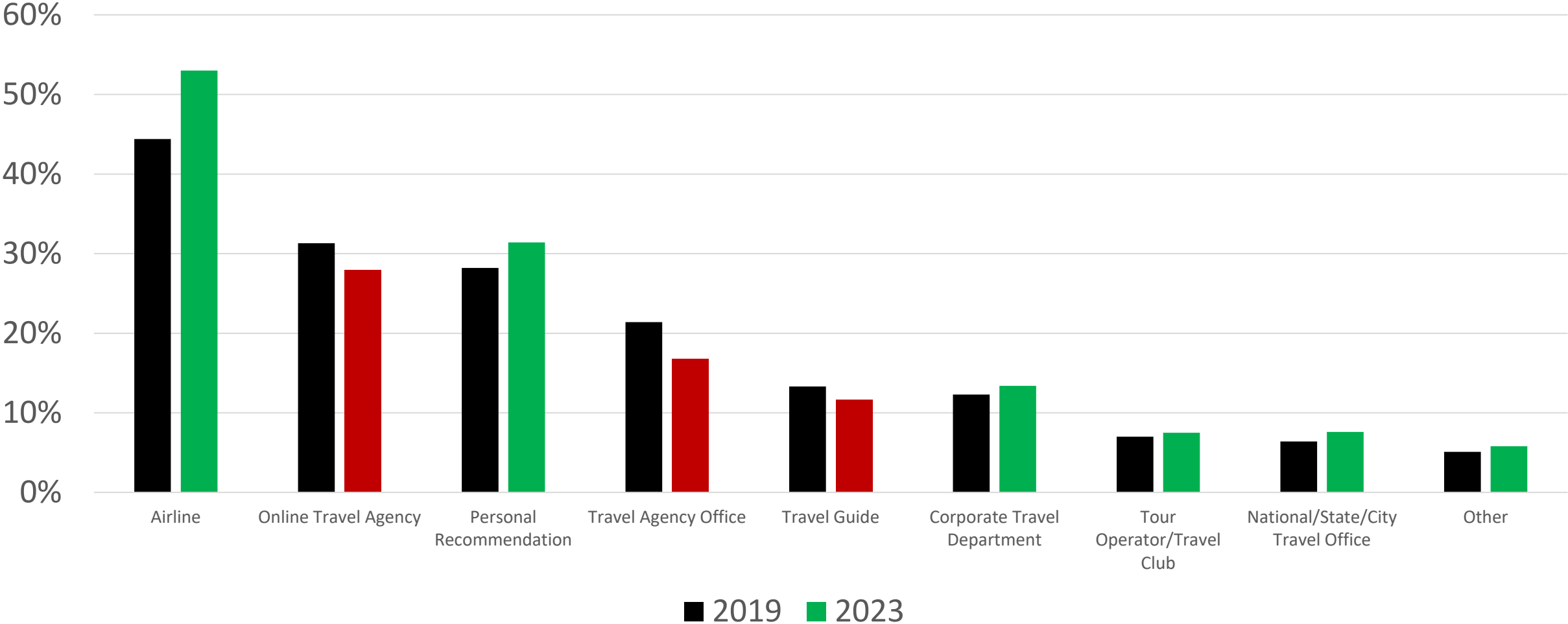
# Go West State Destinations: State of Recovery in 2023

2023 Overseas Visitation (Share of 2019)



Source: NTTO

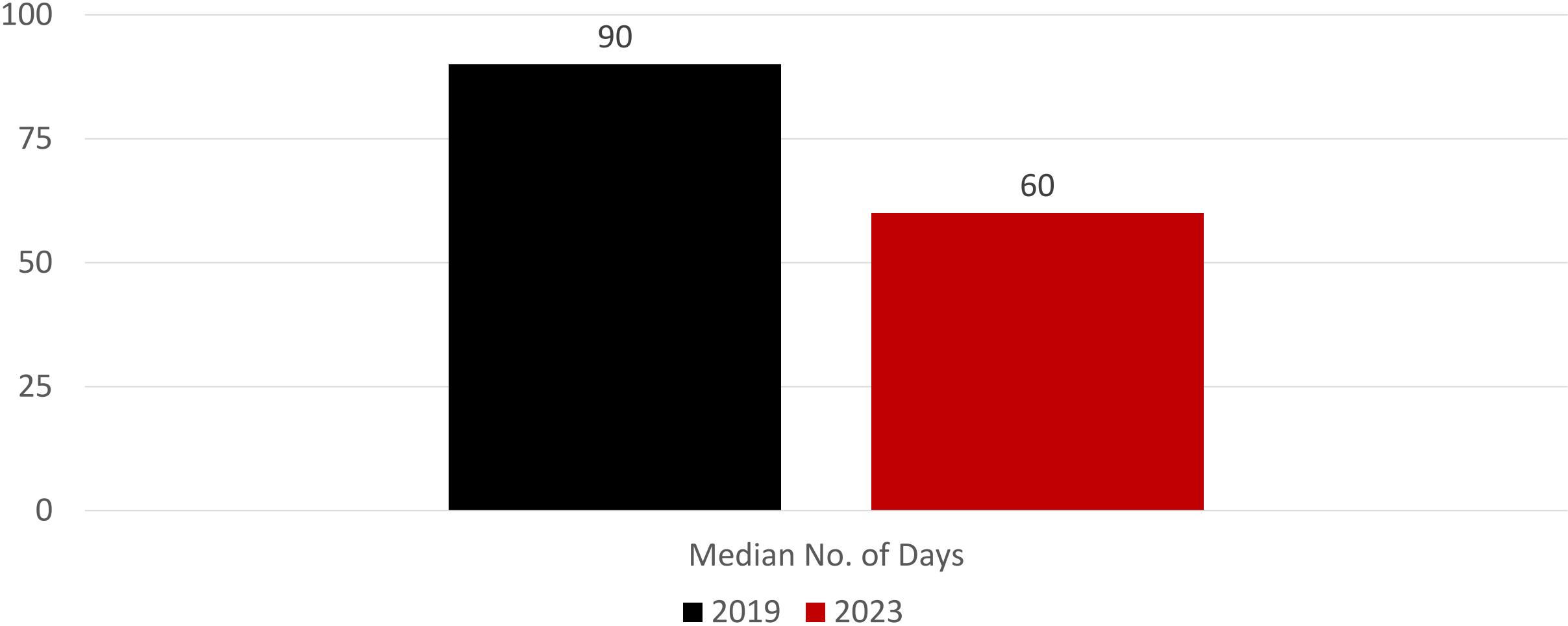
# Go West Overseas Visitors: Source of Information for Trip to U.S. (2019 and 2023)



Source: NTTO



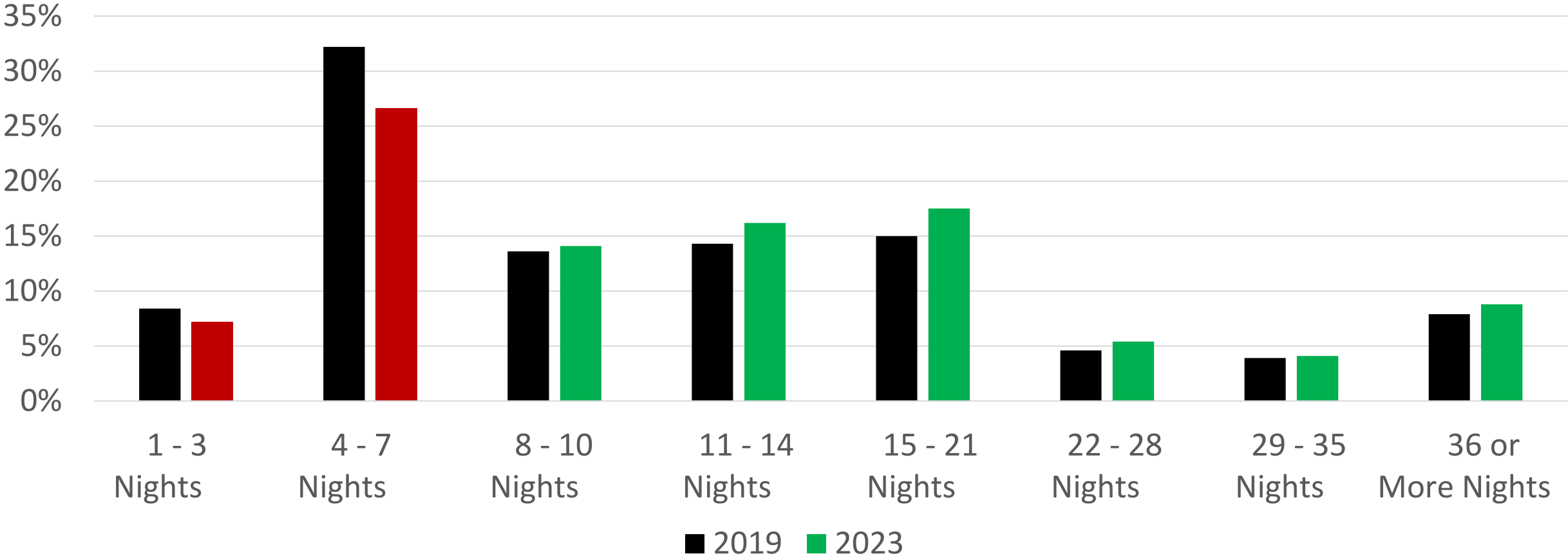
# Go West Overseas: Decision to Travel to the U.S. -- Number of Days Prior to Departure (2019 and 2023)



Source: NTTO

# Go West Overseas Visitors: Nights in the U.S. (2019 and 2023)

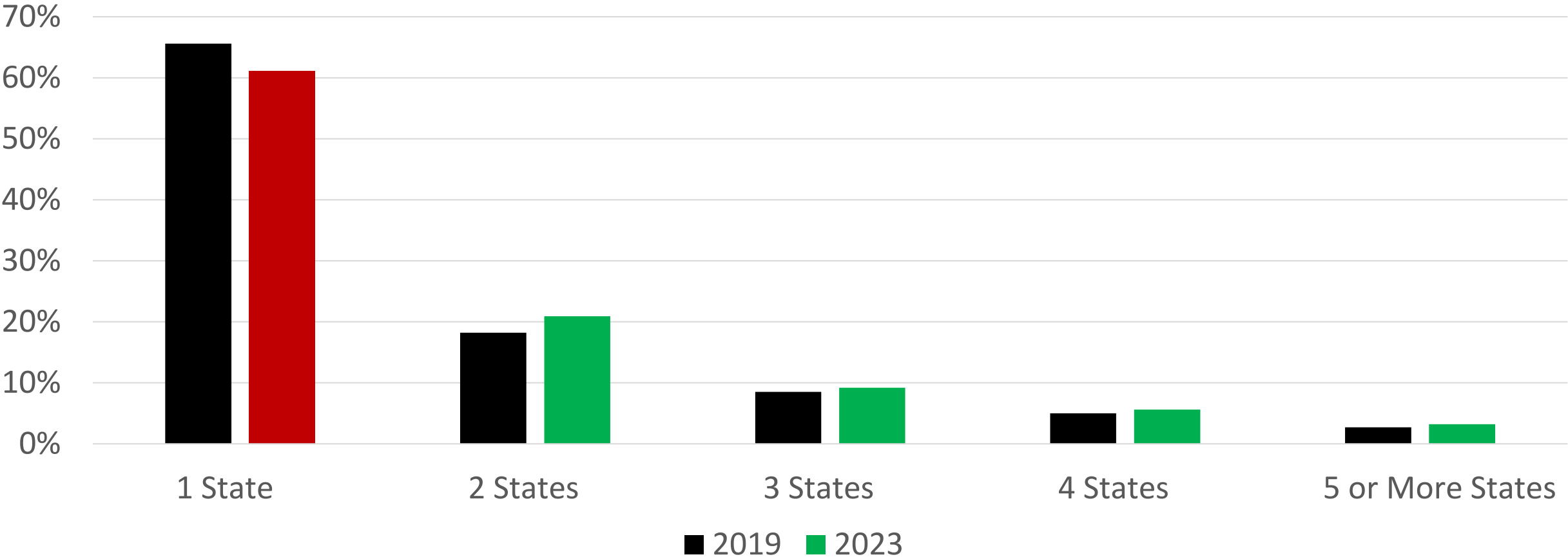
Median Number of Nights: 10 in 2019 to 11 in 2023



Source: NTTO

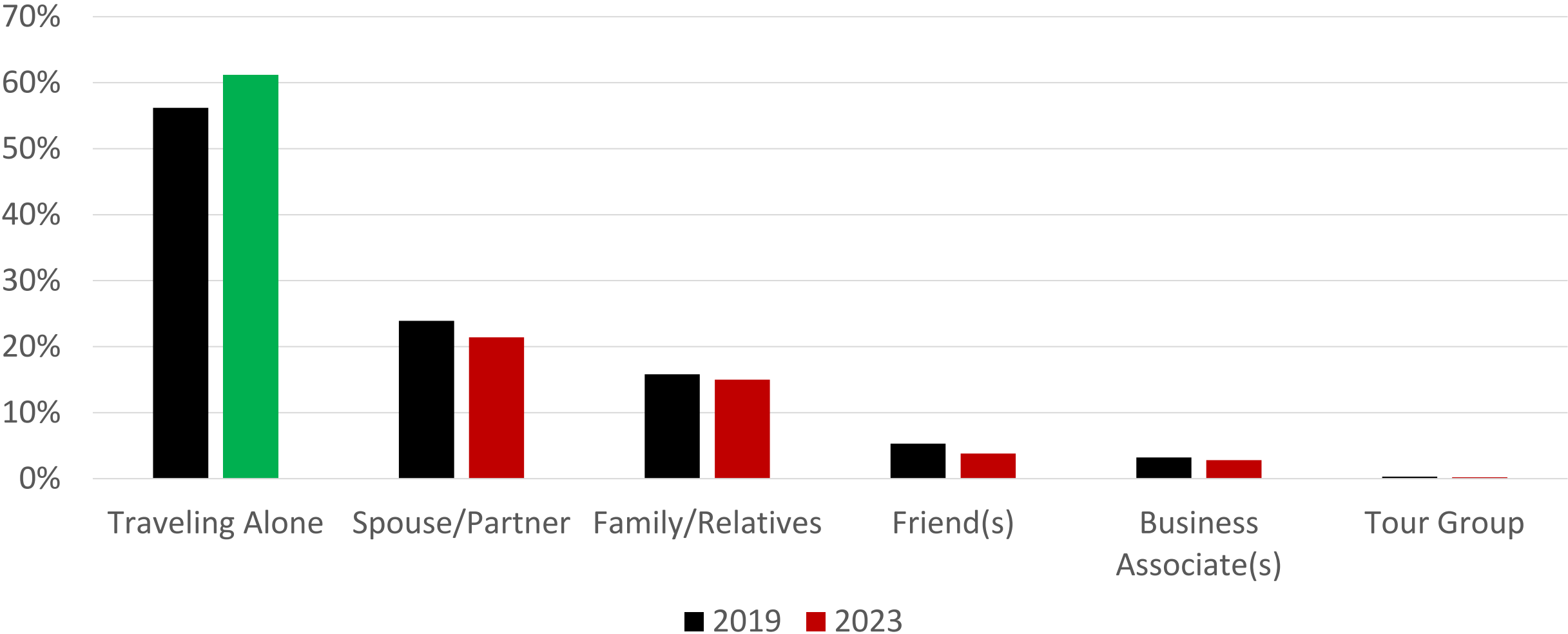
# Go West Overseas Visitors: Number of States Visited (2019 and 2023)

Median Number of States: 1 in 2019 and 1 in 2023



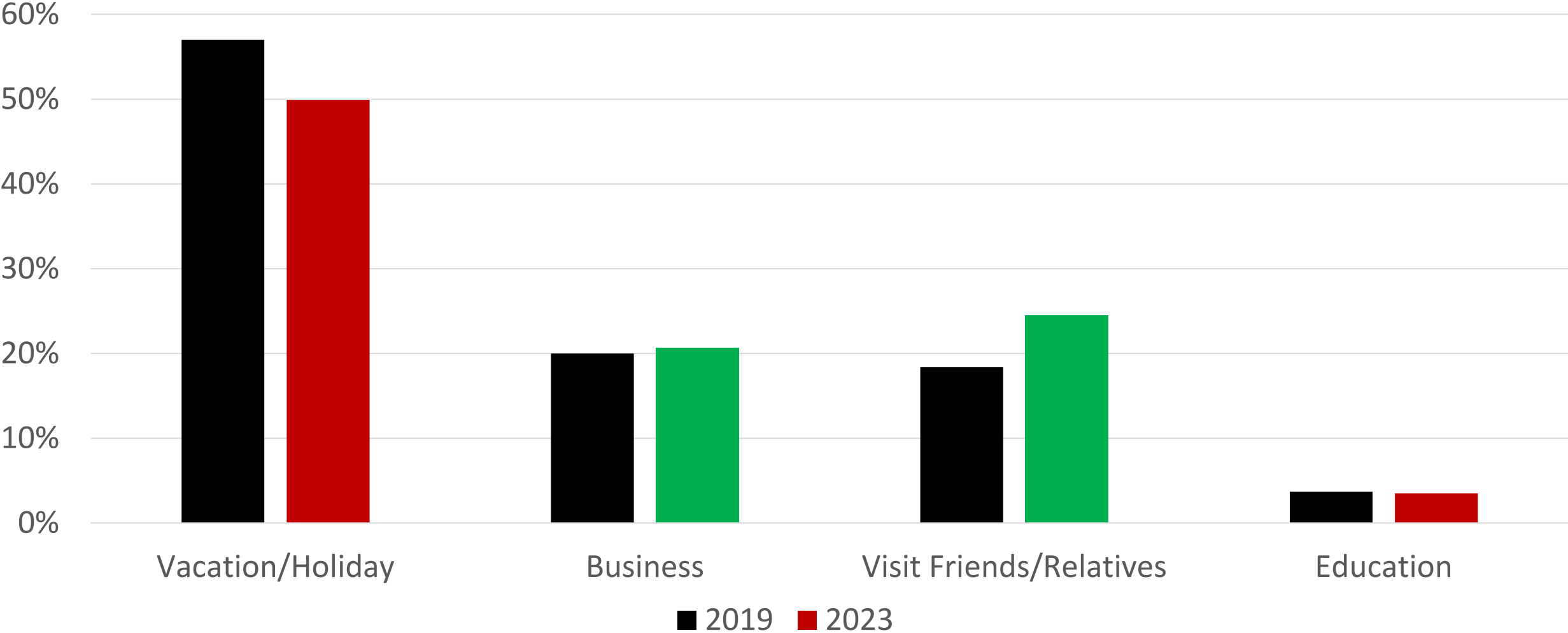
Source: NTTO

# Go West Overseas Visitors: Travel Party Size (2019 and 2023)



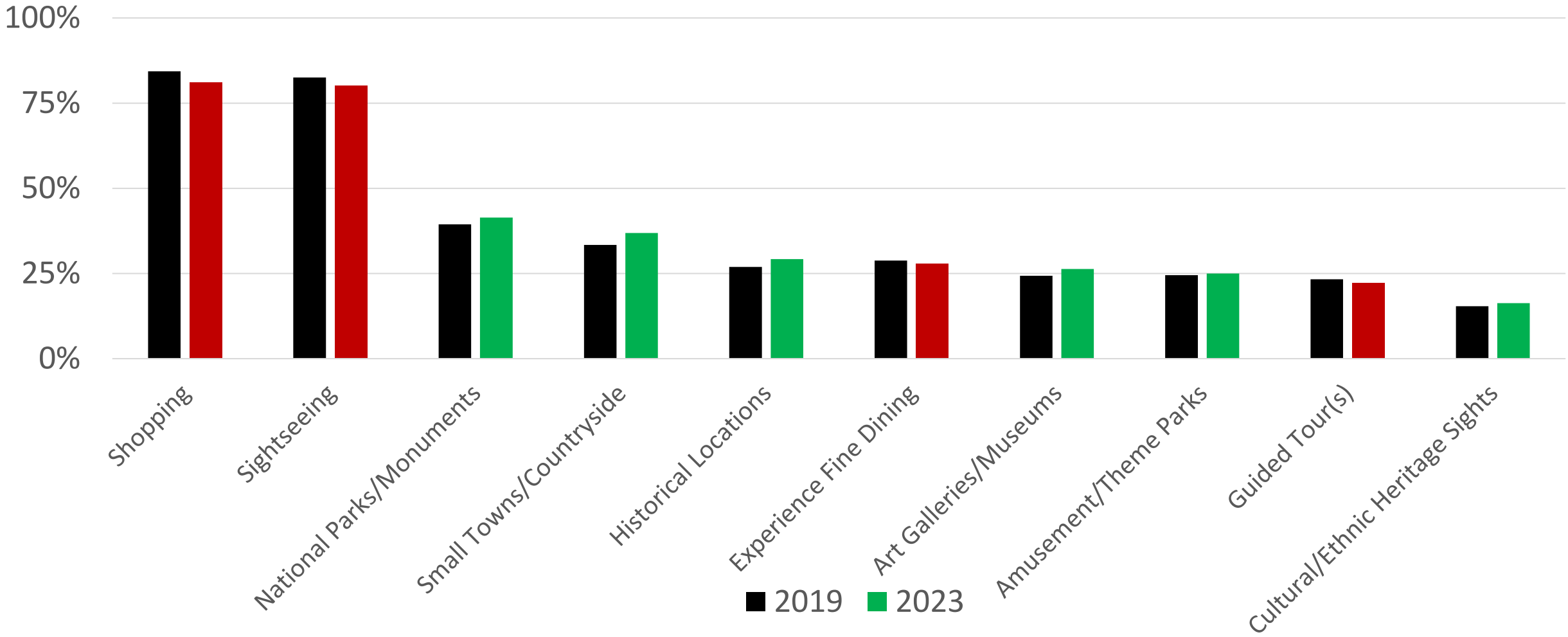
Source: NTTO

# Go West Overseas Visitors: Purpose of Trip (2019 and 2023)



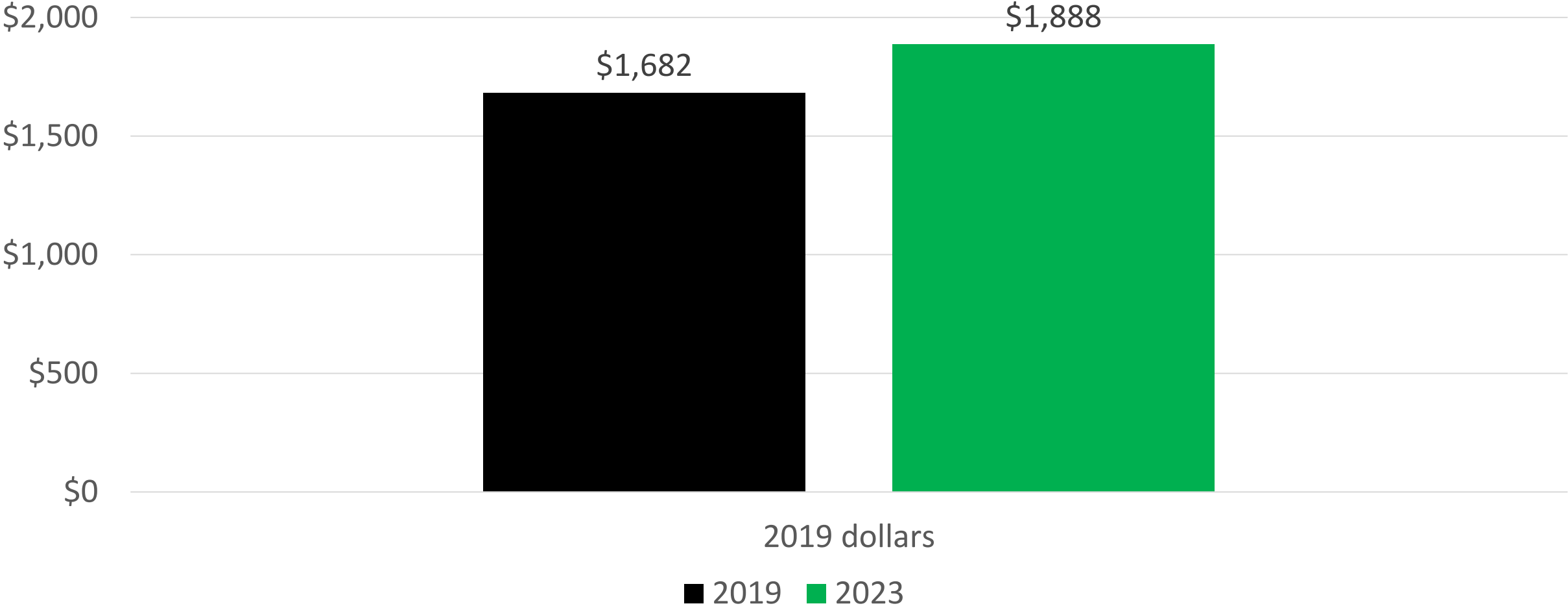
Source: NTTO

# Go West Overseas Visitors: Major Leisure Activities (2019 and 2023)



Source: NTTO

# Go West Overseas Visitors: Average Spending (Per Visitor/Trip) in the United States (2019 and 2023)



Source: NTTO



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

# Thank You!

*Any questions? Contact us:*

- [david.huether@trade.gov](mailto:david.huether@trade.gov)
- [www.trade.gov/national-travel-and-tourism-office](http://www.trade.gov/national-travel-and-tourism-office)