



INTERNATIONAL
TRADE
ADMINISTRATION

UPDATE ON INTERNATIONAL MARKETS FOR NATIVE AMERICAN TOURISM



American Indian Alaska Native Tourism Association

21ST ANNUAL

AMERICAN INDIAN
tourism conference

SEPTEMBER 16-19, 2019 | HARD ROCK HOTEL & CASINO TULSA
HOSTED BY CHEROKEE NATION



julie heizer

National Travel & Tourism Office

Industry & Analysis, International Trade Administration

September 2019

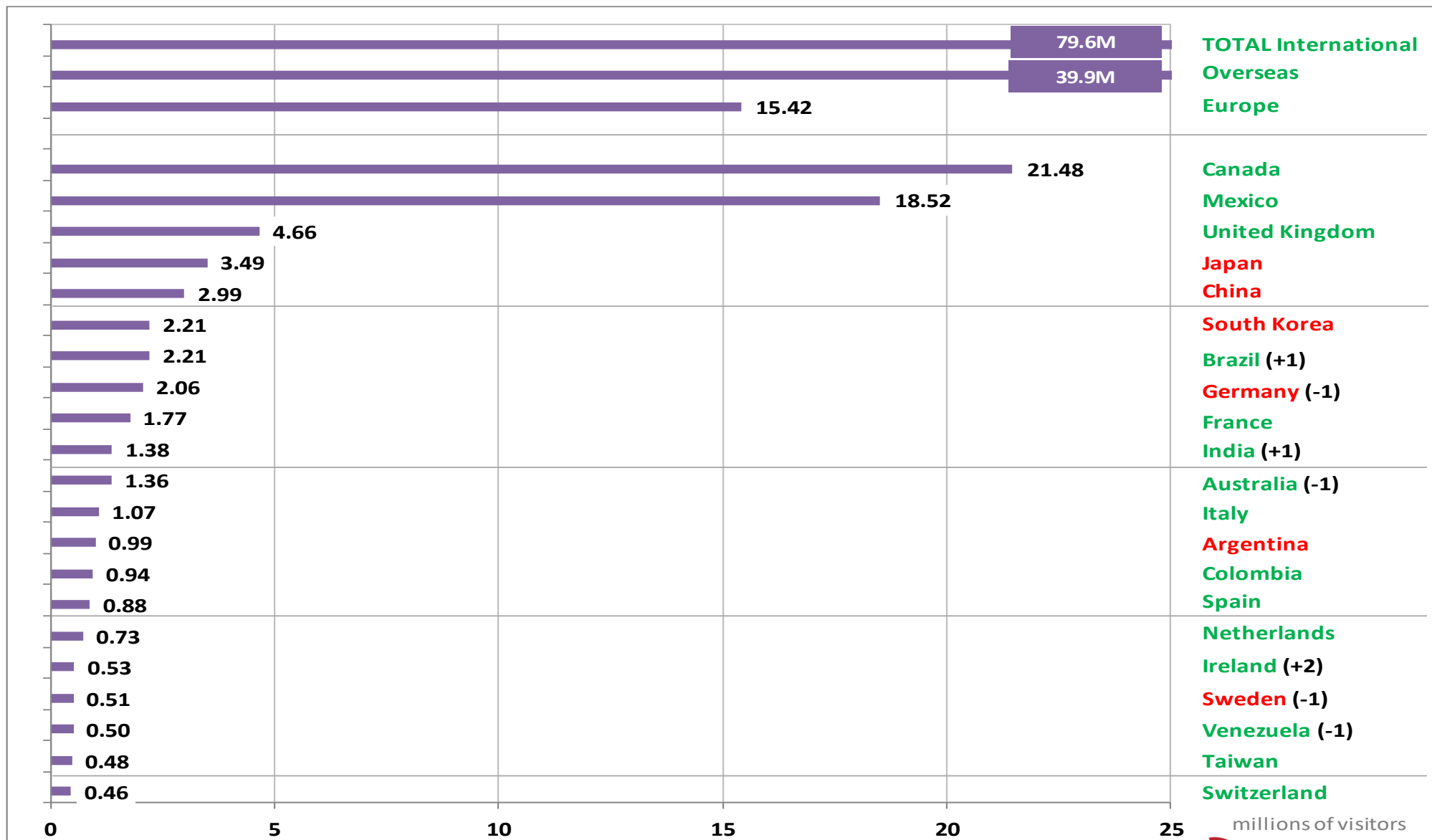


Industry & Analysis



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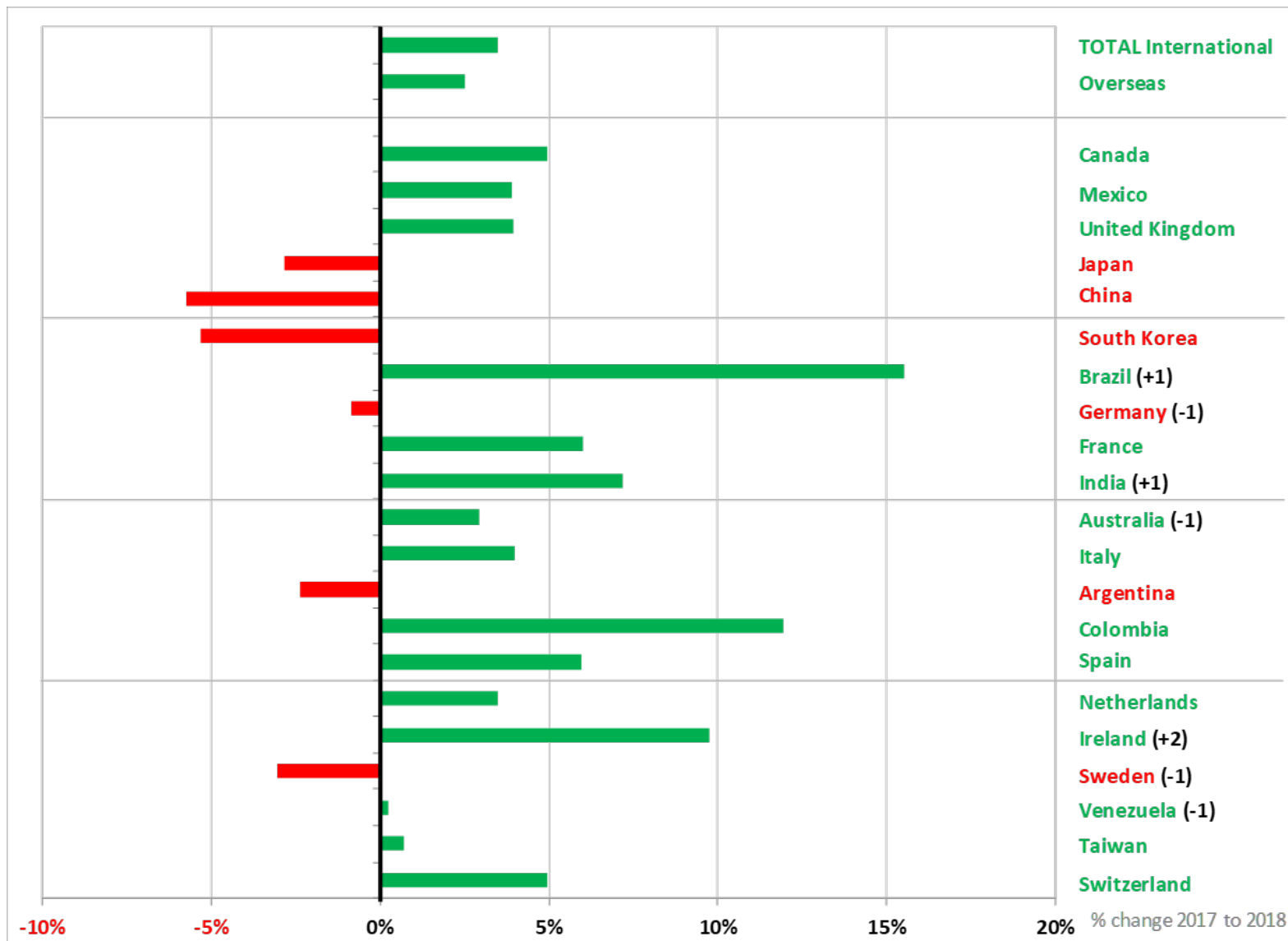
Visitor Volume 2018 (millions)



Industry & Analysis

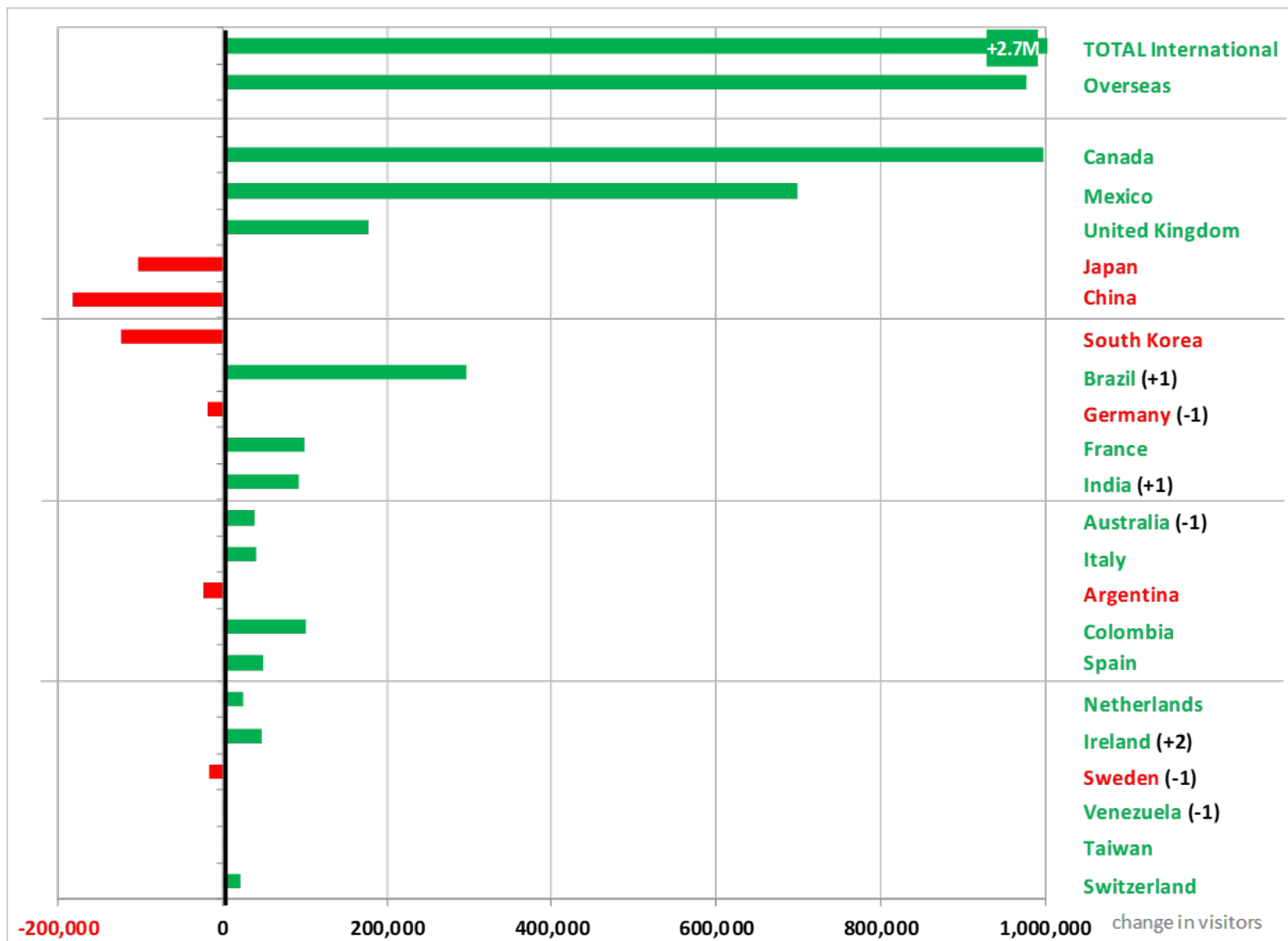


Visitor Volume: PERCENT Change 2018





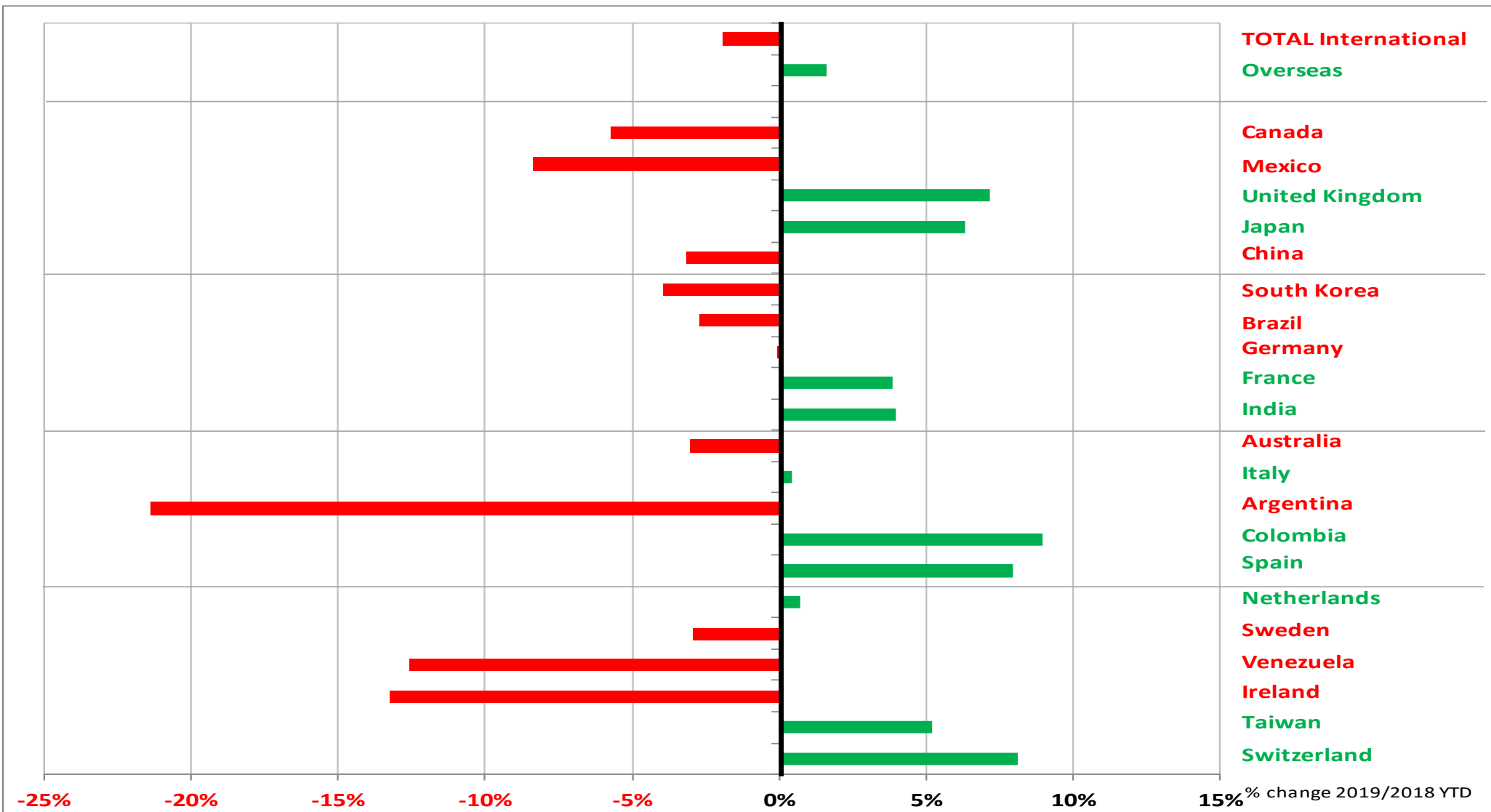
Visitor Volume: CHANGE 2018





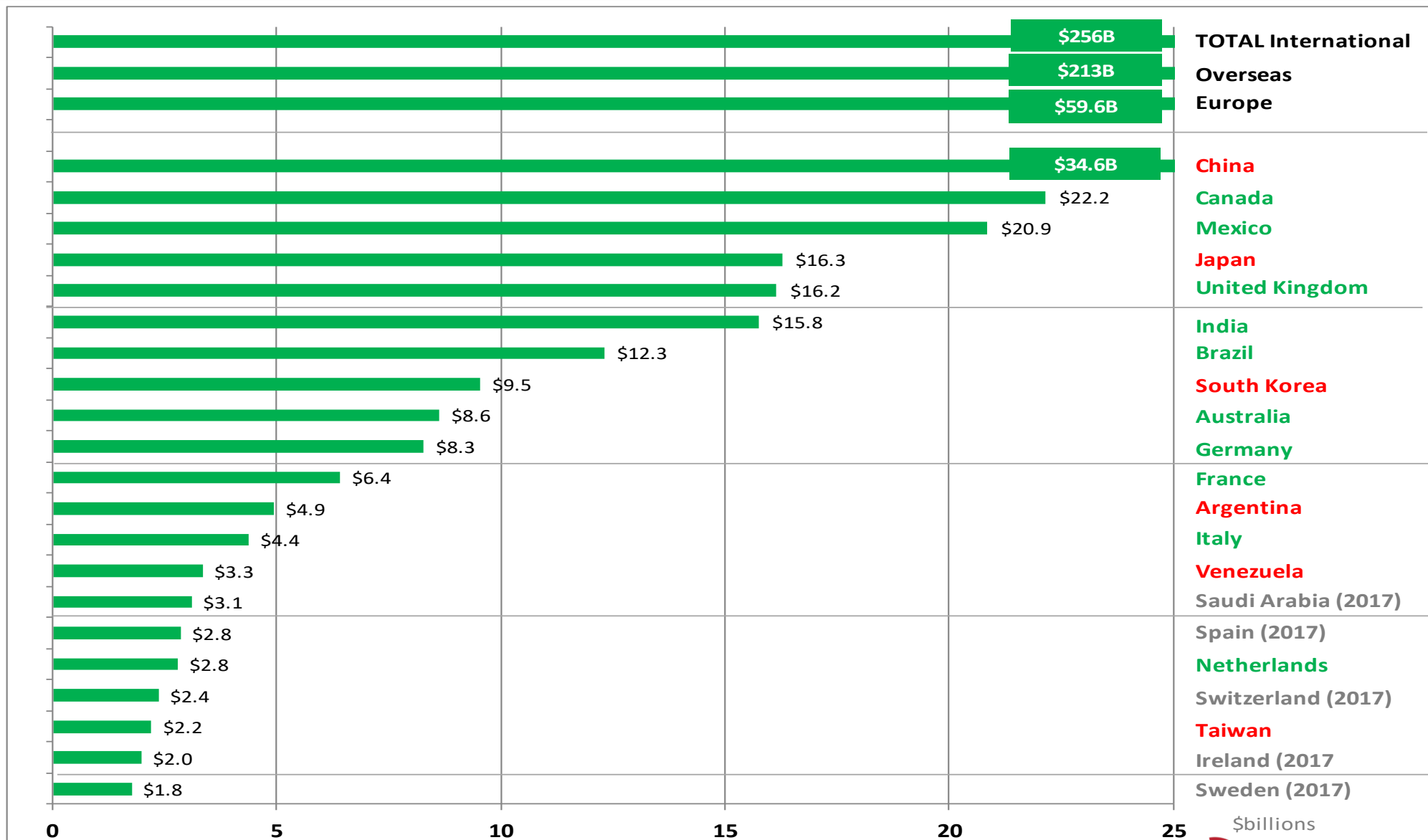
Visitor Volume: CHANGE 2019 YTD vs 2018 YTD

January-June (O/S, Can, Mex Jan-May)





Visitor Travel Exports 2018 (billions)





Top Arrivals and Visitor Spending Markets

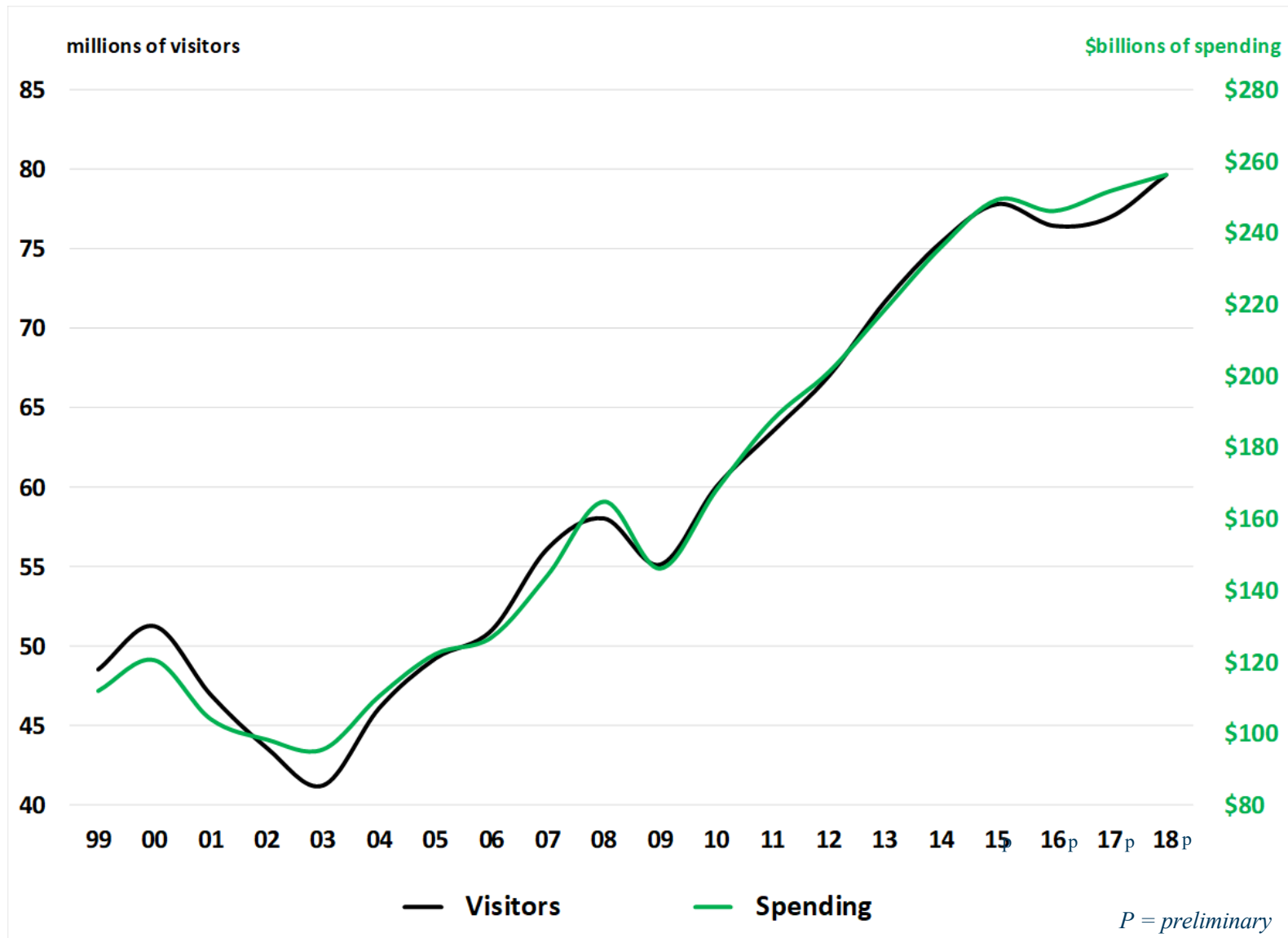
	2018 Arrivals (millions)	18/17	Record Year		2018 Spending (billions)	18/17	Record Year
Canada	20.21	4.9%	2013	China	\$34.63	-2.0%	2017
Mexico	17.82	3.9%	2016	Canada	\$22.16	5.0%	2013
United Kingdom	4.48	3.9%	2015	Mexico	\$20.86	1.7%	2018
Japan	3.60	-2.8%	1997	Japan	\$16.28	-2.6%	2000
China	3.17	-5.7%	2017	United Kingdom	\$16.16	3.2%	2015
South Korea	2.33	-5.3%	2017	India	\$15.76	7.3%	2018
Brazil	1.91	15.5%	2014	Brazil	\$12.30	6.3%	2014
Germany	2.08	-0.9%	2015	South Korea	\$9.54	-4.8%	2017
France	1.67	6.0%	2018	Australia	\$8.63	1.0%	2015
India	1.29	7.2%	2018	Germany	\$8.28	0.5%	2015





U.S. Visitor and Spending Trends

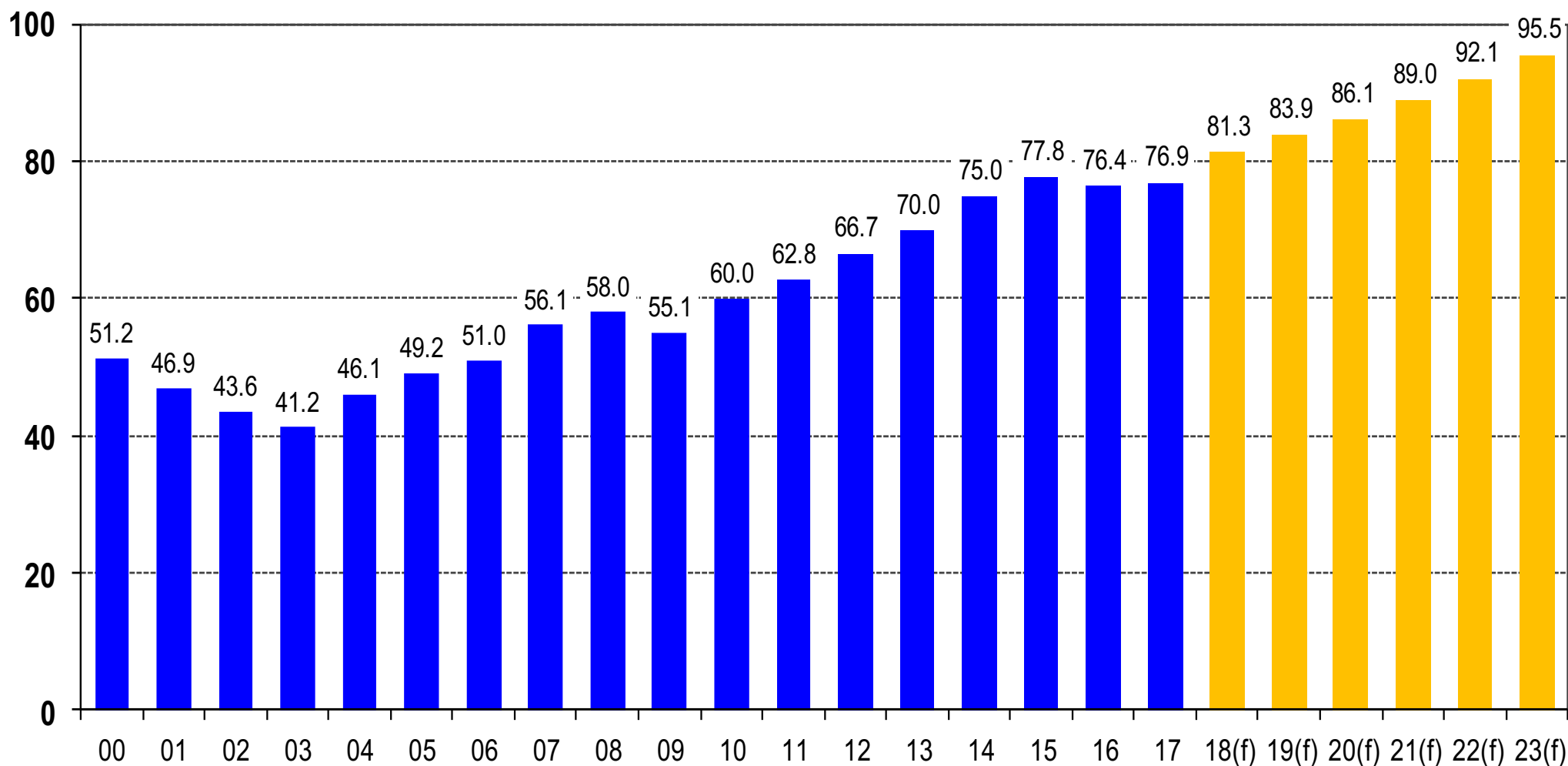
(millions / \$billions)





International Visitors to the U.S. and Projections (2000-2023)

millions of international visitors



Sources: U.S. Department of Commerce, ITA, National Travel and Tourism Office; Secretaria de Turismo (Mexico); Statistics Canada. -- Fall 2018 Travel Forecast



Industry & Analysis



NTTO Travel Forecast Update (Fall 2018)

Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor		%		%		%		%		%		%		%		%	
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	Grand Total	76,941	0.7%	81,317	5.7%	83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%	18,574	24%	3.7%
1	Canada	20,212	5%	21,021	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
2	Mexico	17,824	-6%	19,428	9%	20,010	3%	20,611	3%	21,229	3%	22,078	4%	22,961	4%	5,138	29%	4.3%
	Overseas	38,906	2%	40,869	5%	42,025	2.8%	43,225	2.9%	44,755	3.5%	46,382	3.6%	47,951	3.4%	9,046	23%	3.5%
3	United Kingdom	4,483	-2%	4,662	4%	4,755	2%	4,945	4%	5,143	4%	5,298	3%	5,404	2%	921	21%	3.2%
4	Japan	3,596	-0%	3,488	-3%	3,523	1%	3,558	1%	3,593	1%	3,629	1%	3,702	2%	106	3%	0.5%
5	China	3,174	4%	3,237	2%	3,302	2%	3,401	3%	3,571	5%	3,821	7%	4,127	8%	953	30%	4.5%
6	South Korea	2,335	18%	2,335	0%	2,452	5%	2,550	4%	2,626	3%	2,705	3%	2,786	3%	451	19%	3.0%
7	Germany	2,080	2%	2,143	3%	2,186	2%	2,208	1%	2,230	1%	2,252	1%	2,297	2%	217	10%	1.7%
8	Brazil	1,912	11%	2,065	8%	2,107	2%	2,149	2%	2,213	3%	2,324	5%	2,463	6%	551	29%	4.3%
9	France	1,668	2%	1,801	8%	1,873	4%	1,929	3%	1,987	3%	2,027	2%	2,067	2%	400	24%	3.6%
10	Australia	1,324	-2%	1,363	3%	1,391	2%	1,405	1%	1,447	3%	1,519	5%	1,610	6%	287	22%	3.3%
11	India	1,285	7%	1,414	10%	1,485	5%	1,574	6%	1,668	6%	1,768	6%	1,874	6%	589	46%	6.5%
12	Italy	1,032	4%	1,063	3%	1,116	5%	1,139	2%	1,173	3%	1,196	2%	1,220	2%	188	18%	2.8%
13	Argentina	1,018	10%	1,059	4%	1,091	3%	1,112	2%	1,146	3%	1,192	4%	1,251	5%	233	23%	3.5%
14	Colombia	842	-1%	926	10%	982	6%	1,031	5%	1,072	4%	1,104	3%	1,137	3%	295	35%	5.1%
15	Spain	827	2%	852	3%	886	4%	903	2%	921	2%	931	1%	940	1%	113	14%	2.2%
16	Netherlands	701	4%	729	4%	751	3%	766	2%	781	2%	797	2%	821	3%	120	17%	2.7%
17	Sweden	522	-7%	517	-1%	522	1%	533	2%	549	3%	560	2%	571	2%	49	9%	1.5%
18	Venezuela	500	-15%	500	0%	490	-2%	485	-1%	485	0%	485	0%	480	-1%	-20	-4%	-0.7%
19	Ireland	484	9%	551	14%	590	7%	619	5%	644	4%	664	3%	683	3%	200	41%	5.9%
20	Taiwan	475	2%	489	3%	499	2%	509	2%	524	3%	540	3%	556	3%	81	17%	2.7%
21	Switzerland	441	-6%	455	3%	464	2%	478	3%	492	3%	507	3%	522	3%	81	18%	2.8%





Forecast of International Trade

Estimates in thousands

Rank	Visitor
Order	Origin
2017	Country
Grand Total	
1	Canada
2	Mexico
Overseas	
3	United Kingdom
4	Japan
5	China
6	South Korea
7	Germany
8	Brazil
9	France
10	Australia
11	India
12	Italy
13	Argentina
14	Colombia
15	Spain
16	Netherlands
17	Sweden
18	Venezuela
19	Ireland
20	Taiwan
21	Switzerland

Grand Total		76,94
1	Canada	20,21
2	Mexico	17,82
Overseas		38,90
3	United Kingdom	4,48
4	Japan	3,59
5	China	3,17
6	South Korea	2,33
7	Germany	2,08
8	Brazil	1,91
9	France	1,66
10	Australia	1,32
11	India	1,28
12	Italy	1,03
13	Argentina	1,01
14	Colombia	84
15	Spain	82
16	Netherlands	70
17	Sweden	52
18	Venezuela	50
19	Ireland	48
20	Taiwan	47
21	Switzerland	44





The NTTO Travel Forecast Update

Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor		%		%		%		%		%		%		%		%	
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17

	%		%		%		%		%		%
Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change
2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22





	%	
Change	Change	CAGR
23/17	23/17	23/17
18,574	24%	3.7%
4,391	22%	3.3%
5,138	29%	4.3%
9,046	23%	3.5%
921	21%	3.2%
106	3%	0.5%
953	30%	4.5%
451	19%	3.0%
217	10%	1.7%
551	29%	4.3%
400	24%	3.6%
287	22%	3.3%
589	46%	6.5%
188	18%	2.8%
233	23%	3.5%
295	35%	5.1%
113	14%	2.2%
120	17%	2.7%
49	9%	1.5%
-20	-4%	-0.7%
200	41%	5.9%
81	17%	2.7%
81	18%	2.8%

	%	
Change	Change	CAGR
23/17	23/17	23/17
18,574	24%	3.7%
4,391	22%	3.3%
5,138	29%	4.3%
9,046	23%	3.5%
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	Overseas	38,906	2%	42,869	5%	42,025	2.8%	43,225	2.9%	44,755	3.5%	46,382	3.6%	47,951	3.4%	9,046	23%	3.5%
3	United Kingdom	4,483	-2%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	4,483	0%	921	21%	3.2%
4	Japan	3,596	-0%	3,596	0%	3,596	0%	3,596	0%	3,596	0%	3,596	0%	3,596	0%	106	3%	0.5%
5	China	3,174	4%	3,174	0%	3,174	0%	3,174	0%	3,174	0%	3,174	0%	3,174	0%	953	30%	4.5%
6	South Korea	2,335	18%	2,335	0%	2,335	0%	2,335	0%	2,335	0%	2,335	0%	2,335	0%	451	19%	3.0%
7	Germany	2,080	2%	2,080	0%	2,080	0%	2,080	0%	2,080	0%	2,080	0%	2,080	0%	217	10%	1.7%
8	Brazil	1,912	11%	1,912	0%	1,912	0%	1,912	0%	1,912	0%	1,912	0%	1,912	0%	551	29%	4.3%
9	France	1,668	2%	1,668	0%	1,668	0%	1,668	0%	1,668	0%	1,668	0%	1,668	0%	400	24%	3.6%
10	Australia	1,324	-2%	1,324	0%	1,324	0%	1,324	0%	1,324	0%	1,324	0%	1,324	0%	287	22%	3.3%
11	India	1,285	7%	1,285	0%	1,285	0%	1,285	0%	1,285	0%	1,285	0%	1,285	0%	589	46%	6.5%
12	Italy	1,032	4%	1,032	0%	1,032	0%	1,032	0%	1,032	0%	1,032	0%	1,032	0%	188	18%	2.8%
13	Argentina	1,018	10%	1,018	0%	1,018	0%	1,018	0%	1,018	0%	1,018	0%	1,018	0%	233	23%	3.5%
14	Colombia	842	-1%	926	10%	982	6%	1,031	5%	1,072	4%	1,104	3%	1,137	3%	295	35%	5.1%
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17	Sweden	522	-7%	517	-1%	522	1%	533	2%	549	3%	560	2%	571	2%	49	9%	1.5%
18	Venezuela	500	-15%	500	0%	490	-2%	485	-1%	485	0%	485	0%	480	-1%	-20	-4%	-0.7%
19	Ireland	484	9%	551	14%	590	7%	619	5%	644	4%	664	3%	683	3%	200	41%	5.9%
20	Taiwan	475	2%	489	3%	499	2%	509	2%	524	3%	540	3%	556	3%	81	17%	2.7%
21	Switzerland	441	-6%	455	3%	464	2%	478	3%	492	3%	507	3%	522	3%	81	18%	2.8%

Forecast **Change**

2018 **18/17**

81,317 **5.7%**



The NTTO Travel Forecast Update

Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor		%		%		%		%		%		%		%		%		
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR	
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17	
	Grand Total	76,941	0.7%	81,317	5.7%	83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%	18,574	24%	3.7%	
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	Overseas	38,906	2%	40,869	5%	42,025	2.8%	43,225	2.9%	44,755	3.5%	46,382	3.6%	47,951	3.4%	9,046	23%	3.5%	
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Forecast		Change		Forecast		Change		Forecast		Change		Forecast		Change		Forecast		Change	
2019		19/18		2020		20/19		2021		21/20		2022		22/21		2023		23/22	
83,897		3.2%		86,135		2.7%		88,952		3.3%		92,117		3.6%		95,516		3.7%	
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	Grand Total	76,941	0.7%	81,317	5.7%	83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%	18,574	24%	3.7%
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10	Australia	1,324	-2%	1,363	3%	1,391	2%	1,405	1%	1,447	3%	1,519	5%	1,610	6%	287	22%	3.3%
11	India	1,285	7%	1,414	10%	1,485	5%	1,574	6%	1,668	6%	1,768	6%	1,874	6%	589	46%	6.5%
12	Italy	1,032	4%	1,063	3%	1,116	5%	1,139	2%	1,173	3%	1,196	2%	1,220	2%	188	18%	2.8%
13	Argentina	1,018	10%	1,059	4%	1,091	3%	1,112	2%	1,146	3%	1,192	4%	1,251	5%	233	23%	3.5%
14	Colombia	842	-1%	926	10%	982	6%	1,031	5%	1,072	4%	1,104	3%	1,137	3%	295	35%	5.1%
15	Spain	827	2%	852	3%	886	4%	903	2%	921	2%	931	1%	940	1%	113	14%	2.2%
16	Netherlands	701	4%	729	4%	751	3%	766	2%	781	2%	797	2%	821	3%	120	17%	2.7%
17	Sweden	522	-7%	517	-1%	522	1%	533	2%	549	3%	560	2%	571	2%	49	9%	1.5%
18	Venezuela	500	-15%	500	0%	490	-2%	485	-1%	485	0%	485	0%	480	-1%	-20	-4%	-0.7%
19	Ireland	484	9%	551	14%	590	7%	619	5%	644	4%	664	3%	683	3%	200	41%	5.9%
20	Taiwan	475	2%	489	3%	499	2%	509	2%	524	3%	540	3%	556	3%	81	17%	2.7%
21	Switzerland	441	-6%	455	3%	464	2%	478	3%	492	3%	507	3%	522	3%	81	18%	2.8%



The NTTO Travel Forecast Update

Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor		%		%		%		%		%		%		%		%	
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	Grand Total	76,941	0.7%	81,317	5.7%	83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%	18,574	24%	3.7%
1	Canada	20,212	5%	21,021	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
2	Mexico	17,824	-6%	19,428	9%	20,010	3%	20,611	3%	21,229	3%	22,078	4%	22,961	4%	5,138	29%	4.3%
	Overseas	38,906	2%	40,869	5%	42,025	2.8%	43,225	2.9%	44,755	3.5%	46,382	3.6%	47,951	3.4%	9,046	23%	3.5%
3	United Kingdom	4,483	-2%	4,662	4%	4,755	2%	4,945	4%	5,143	4%	5,298	3%	5,404	2%	921	21%	3.2%
4	Japan	3,596	-0%	3,488	-3%	3,523	1%	3,558	1%	3,593	1%	3,629	1%	3,702	2%	106	3%	0.5%
5	China	3,174	4%	3,237	2%	3,302	2%	3,401	3%	3,571	5%	3,821	7%	4,127	8%	953	30%	4.5%
6	South Korea	2,335	18%	2,335	0%	2,452	5%	2,550	4%	2,626	3%	2,705	3%	2,786	3%	451	19%	3.0%
7	Germany	2,080	2%	2,143	3%	2,186	2%	2,208	1%	2,230	1%	2,252	1%	2,297	2%	217	10%	1.7%
8	Brazil	1,912	11%	2,065	8%	2,107	2%	2,149	2%	2,213	3%	2,324	5%	2,463	6%	551	29%	4.3%
9	France	1,668	2%	1,801	8%	1,873	4%	1,929	3%	1,987	3%	2,027	2%	2,067	2%	400	24%	3.6%
10	Australia	1,324	-2%	1,363	3%	1,391	2%	1,405	1%	1,447	3%	1,519	5%	1,610	6%	287	22%	3.3%
11	India	1,285	7%	1,414	10%	1,485	5%	1,574	6%	1,668	6%	1,768	6%	1,874	6%	589	46%	6.5%
12	Italy	1,032	4%	1,063	3%	1,116	5%	1,139	2%	1,173	3%	1,196	2%	1,220	2%	188	18%	2.8%
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18	Venezuela	500	-15%	500	0%	490	-2%	485	-1%	485	0%	485	0%	480	-1%	-20	-4%	-0.7%
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The NTTO Travel Forecast Update

Forecast of International Travelers to the United States by Top Origin Countries

Estimates in thousands

Rank	Visitor		%		%		%		%		%		%		%		%	
Order	Origin	Actual	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Forecast	Change	Change	Change	CAGR
2017	Country	2017	17/16	2018	18/17	2019	19/18	2020	20/19	2021	21/20	2022	22/21	2023	23/22	23/17	23/17	23/17
	Grand Total	76,941	0.7%	81,317	5.7%	83,897	3.2%	86,135	2.7%	88,952	3.3%	92,117	3.6%	95,516	3.7%	18,574	24%	3.7%
1	Canada	20,212	5%	21,021	4%	21,862	4%	22,299	2%	22,968	3%	23,657	3%	24,603	4%	4,391	22%	3.3%
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	Overseas	38,906	2%	40,869	5%	42,025	2.8%	43,225	2.9%	44,755	3.5%	46,382	3.6%	47,951	3.4%	9,046	23%	3.5%
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17	Sweden	522	-7%	517	-1%	522	1%	533	2%	549	3%	560	2%	571	2%	49	9%	1.5%
18	Venezuela	500	-15%	500	0%	490	-2%	485	-1%	485	0%	485	0%	480	-1%	-20	-4%	-0.7%
19	Ireland	484	9%	551	14%	590	7%	619	5%	644	4%	664	3%	683	3%	200	41%	5.9%
20	Taiwan	475	2%	489	3%	499	2%	509	2%	524	3%	540	3%	556	3%	81	17%	2.7%
21	Switzerland	441	-6%	455	3%	464	2%	478	3%	492	3%	507	3%	522	3%	81	18%	2.8%



Trends We Watch for the Forecast

- **Global Traveler Volumes:** Volume and spending growth continues...now more or less on UNWTO schedule of decelerating growth rates to 2030.
 - 2017: up +7.0%
 - 2018: up +5.6%
 - 2019: up +4.4% YTD.
- **U.S. Arrivals:** Up 0.7% in 2017; Up 3.5% in 2018. 2019 is off to a very uneven start. Overseas up 1.6%, Canada and Mexico both down big.
- **U.S. Travel Exports:** 2018 vs 2017 (June 2019 release)
 - + 1.8% Total
 - + 1.9% Receipts
 - + 5.4% Education/Medical/Seasonal Workers
 - + 1.6% Travel Spending (excluding E/M/S)
 - + 1.4% Passenger Fares
- **Airline Capacity:** Most top markets had positive monthly seat changes through January 2019. Declines for South Korea. Looking forward six months in 2019...India looking strong. France, Germany, Japan, U.K. are flat to low growth. Declines for South Korea, China, and Brazil. USA outbound visitor volume was up 9% in 2018 and similar for 2019 YTD, and thus using much of the seat growth.



More Trends We Watch for the Forecast

- **APIS**: Citizenship-based census count of persons entering/departing the U.S. via air regardless of residence or purpose or stay length. The non-U.S. citizen count (entering the USA) consistently up 3.5% to 4.5% past five years.
- **Electronic System for Travel Authorization (ESTA)**: Interest in visiting the U.S. from VWP countries is flat over the past 12 months; 2018 ended up 1.8%. 2019 up 0.6% through June.
- **Brand USA**: USG match of up to \$100M fully funded moving forward based on ESTA fee collections. 12-month moving sum is \$152M, thus room to spare for some time.
- **IMF Country-Level Forecasts**: Semi-annual database release. October 2018 release revised overall modest growth downward slightly. Concerns expressed last year for close-in future showing up for some markets (China, South Korea, South America), but not others (U.K., Japan, Colombia).
- **U.S. Visa Issuance**: FY18 U.S. Department of State visa issuance -9% (yes, again). Down again for China (-14%), but India set a record, and Brazil rebound continues, but still half of record level.



- Flights from Europe to the United States are constant through the end of this year, HOWEVER ...
- Several traditional gateways will see double digit increases (DEN, CLT, DFW, BOS and MIA), AND
- Significant increases are on tap for CHS, MCI, BNA, SJU, IND, PHX, AUS, PDX and TPA



Hotel-Motel Room Nights

(millions) assumes 1 room/party

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Overseas	99	104	95	111	124	138	160	155	170	179	174	175
Canada	19	21	20	25	27	39	26	32	30	28	29	31
China	3	2	3	5	5	9	11	17	20	22	21	21
U.K.	16	17	15	15	15	16	16	18	21	22	19	18
India	7	7	6	7	7	9	12	11	9	13	12	11
Brazil	3	4	5	6	9	9	11	10	9	9	8	10
Mexico (air)	5	4	5	5	6	7	6	7	8	8	7	10
Germany	7	9	7	8	9	9	9	10	11	11	9	9
Japan	9	9	8	11	9	10	10	10	10	10	10	9
France	4	5	4	5	6	7	9	8	7	7	8	8
Australia	4	5	4	6	7	8	9	9	10	10	8	8
South Korea	3	3	3	5	6	5	6	7	9	7	8	7
Italy	3	3	3	3	3	4	4	4	4	4	4	4





AIANTA

American Indian Alaska Native
Tourism Association

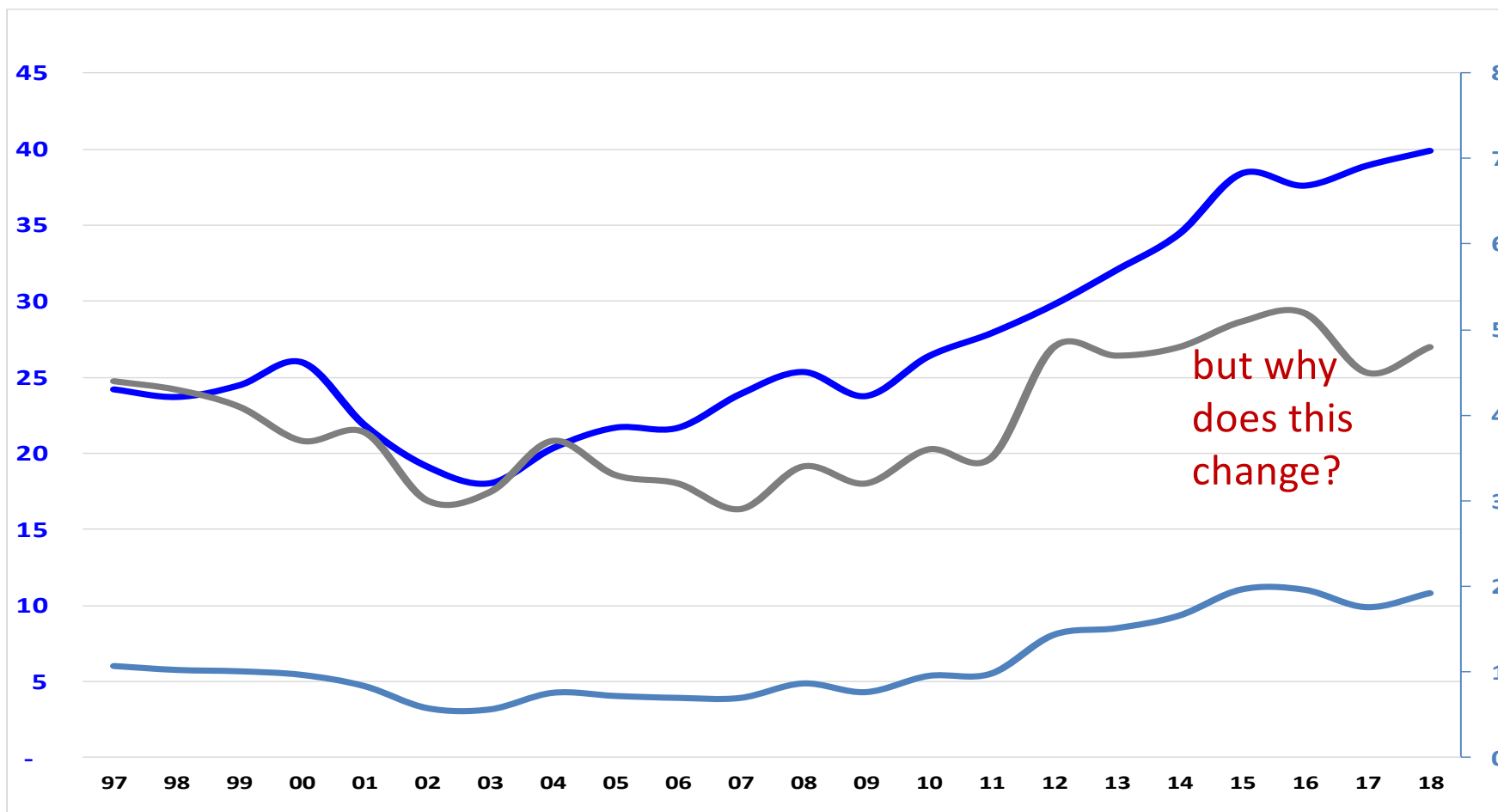
Visitation Estimates & Traveler Characteristics of Overseas Travelers to American Indian Communities



Visitor Volume to American Indian Communities...Deconstructed

millions of overseas visitors

%; millions of VAIC visitors



- overseas visitors (LHS millions)
- visit American Indian Community INCIDENCE (RHS millions)
- visit American Indian Community VISITORS (RHS millions)





Visitor Volume to American Indian Communities...Deconstructed (continued)

		1997	1997	1997	1997
		Visitor	VAIC	VAIC	% of VAIC
		Volume	Incidence	Volume	Volume
		#	%	#	%
		(000s)		(000s)	
	Total International	47,766	---	---	
	O-S/Can/Mex air	40,625	2.9%	1,196	
	All Overseas	24,194	4.4%	1,065	---
1	Germany	1,994	9.3%	185	16.2%
2	United Kingdom	3,721	4.9%	182	15.9%
3	Canada	15,127	0.6%	83	7.2%
4	France	978	8.5%	83	7.2%
5	South Korea	747	8.5%	63	5.5%
6	Japan	5,368	1.1%	59	5.1%
7	Italy	580	8.8%	51	4.4%
8	Australia	501	7.6%	38	3.3%
9	Switzerland	410	8.9%	36	3.2%
10	Netherlands	473	7.7%	36	3.2%
11	Taiwan	443	4.7%	21	1.8%
12	Sweden	292	6.6%	19	1.7%
13	Argentina	503	3.4%	17	1.5%
14	Brazil	941	1.5%	14	1.2%
15	Mexico (AIR ONLY)	1,304	3.7%	48	-
16	Spain	328	-	-	-
17	Colombia	318	-	-	-
18	China	210	-	-	-
19	India	173	-	-	-
20	Denmark	145	-	-	-



Visitor Volume to American Indian Communities...Deconstructed (continued)

		1997	1997	1997	1997	2007	2007	2007	2007
		Visitor	VAIC	VAIC	% of VAIC	Visitor	VAIC	VAIC	% of VAIC
		Volume	Incidence	Volume	Volume	Volume	Incidence	Volume	Volume
		#	%	#	%	#	%	#	%
		(000s)		(000s)		(000s)		(000s)	
	Total International	47,766	---	---		57,584	---	---	
	O-S/Can/Mex air	39,764	2.9%	1,169		43,396	2.2%	970	
	All Overseas	24,194	4.4%	1,065	---	25,341	3.4%	862	---
1	United Kingdom	3,721	4.9%	182	15.9%	4,565	3.2%	146	15.2%
2	Germany	1,994	9.3%	185	16.2%	1,782	5.9%	105	11.0%
3	Canada	15,127	0.6%	83	7.2%	17,760	0.6%	98	10.2%
4	France	978	8.5%	83	7.2%	1,244	7.1%	88	9.2%
5	India	173	-	-	-	599	9.9%	59	6.2%
6	Italy	580	8.8%	51	4.4%	779	6.4%	50	5.2%
7	Australia	501	7.6%	38	3.3%	690	6.7%	46	4.8%
8	Netherlands	473	7.7%	36	3.2%	608	7.3%	44	4.6%
9	Japan	5,368	1.1%	59	5.1%	3,250	0.7%	23	2.4%
10	Spain	328	-	-	-	658	3.0%	20	2.1%
11	China	210	-	-	-	493	3.6%	18	1.9%
12	Switzerland	410	8.9%	36	3.2%	342	3.8%	13	1.4%
13	Sweden	292	6.6%	19	1.7%	397	3.1%	12	1.3%
14	South Korea	747	8.5%	63	5.5%	759	1.5%	11	1.2%
15	Taiwan	443	4.7%	21	1.8%	295	3.5%	10	1.1%
16	Brazil	941	1.5%	14	1.2%	769	1.1%	8	0.9%
17	Mexico (AIR ONLY)	1,304	-	-	-	1,878	0.3%	5	0.5%
18	Colombia	318	-	-	-	419	-	-	-
19	Argentina	503	3.4%	17	1.5%	318	-	-	-
20	Denmark	145	-	-	-	218	-	-	-



Visitor Volume to American Indian Communities...Deconstructed (continued)

		1997	1997	1997	1997	2007	2007	2007	2007	2018	2018	2018	2018
		Visitor	VAIC	VAIC	% of VAIC	Visitor	VAIC	VAIC	% of VAIC	Visitor	VAIC	VAIC	% of VAIC
		Volume	Incidence	Volume	Volume	Volume	Incidence	Volume	Volume	Volume	Incidence	Volume	Volume
		#	%	#	%	#	%	#	%	#	%	#	%
		(000s)		(000s)		(000s)		(000s)		(000s)		(000s)	
Total International		47,766	---	---		57,584	---	---		79,617	---	---	
O-S/Can/Mex air		28,388	4.5%	1,283		30,514	3.4%	1,052		45,267	4.6%	2,102	
All Overseas		24,194	4.4%	1,065	---	25,341	3.4%	862	---	39,883	4.8%	1,914	---
1	South Korea	747	8.5%	63	5.5%	759	1.5%	11	1.2%	2,211	9.3%	206	10.1%
2	France	978	8.5%	83	7.2%	1,244	7.1%	88	9.2%	1,767	10.8%	191	9.4%
3	United Kingdom	3,721	4.9%	182	15.9%	4,565	3.2%	146	15.2%	4,659	3.5%	163	8.0%
4	China	210	-	-	-	493	3.6%	18	1.9%	2,992	4.7%	141	6.9%
5	India	173	-	-	-	599	9.9%	59	6.2%	1,378	9.6%	132	6.5%
6	Germany	1,994	9.3%	185	16.2%	1,782	5.9%	105	11.0%	2,062	5.8%	120	5.9%
7	Canada	15,127	0.6%	83	7.2%	17,760	0.6%	98	10.2%	21,211	0.6%	117	5.7%
8	Spain	328	-	-	-	658	3.0%	20	2.1%	876	11.7%	102	5.0%
9	Australia	501	7.6%	38	3.3%	690	6.7%	46	4.8%	1,362	6.9%	94	4.6%
10	Italy	580	8.8%	51	4.4%	779	6.4%	50	5.2%	1,073	8.3%	89	4.4%
11	Mexico (AIR ONLY)	1,304	-	-	-	1,878	0.3%	5	0.5%	2,757	2.6%	72	3.5%
12	Brazil	941	1.5%	14	1.2%	769	1.1%	8	0.9%	2,209	2.1%	46	2.3%
13	Colombia	318	-	-	-	419	-	-	-	943	4.1%	39	1.9%
14	Japan	5,368	1.1%	59	5.1%	3,250	0.7%	23	2.4%	3,493	0.8%	28	1.4%
15	Netherlands	473	7.7%	36	3.2%	608	7.3%	44	4.6%	725	3.4%	25	1.2%
16	Sweden	292	6.6%	19	1.7%	397	3.1%	12	1.3%	506	4.7%	24	1.2%
17	Argentina	503	3.4%	17	1.5%	318	-	-	-	994	2.2%	22	1.1%
18	Taiwan	443	4.7%	21	1.8%	295	3.5%	10	1.1%	478	3.9%	19	0.9%
19	Switzerland	410	8.9%	36	3.2%	342	3.8%	13	1.4%	463	3.3%	15	0.8%
20	Denmark	145	-	-	-	218	-	-	-	331	-	-	-



Visitor Volume to American Indian Communities...Deconstructed (continued)

		1997	1997	1997	1997	2007	2007	2007	2007	2018	2018	2018	2018	16/17/18	16/17/18	16/17/18	16/17/18
		Visitor	VAIC	VAIC	% of VAIC	Visitor	VAIC	VAIC	% of VAIC	Visitor	VAIC	VAIC	% of VAIC	Visitor	VAIC	VAIC	% of VAIC
		Volume	Incidence	Volume	Volume	Volume	Incidence	Volume	Volume	Volume	Incidence	Volume	Volume	Volume	Incidence	Volume	Volume
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
		(000s)		(000s)		(000s)		(000s)		(000s)		(000s)		(000s)		(000s)	
Total International		47,766	---	---		57,584	---	---		79,617	---	---		77,657	---	---	
O-S/Can/Mex air		28,207	4.5%	1,266		30,303	3.4%	1,020		45,048	4.7%	2,101		43,894	4.7%	2,060	
All Overseas		24,194	4.4%	1,065	---	25,341	3.4%	862	---	39,883	4.8%	1,914	---	38,793	4.8%	1,873	---
1	China	210	-	-	-	493	3.6%	18	1.9%	2,992	4.7%	141	6.9%	3,046	6.3%	193	9.7%
2	South Korea	747	8.5%	63	5.5%	759	1.5%	11	1.2%	2,211	9.3%	206	10.1%	2,173	8.9%	193	9.7%
3	United Kingdom	3,721	4.9%	182	15.9%	4,565	3.2%	146	15.2%	4,659	3.5%	163	8.0%	4,572	3.5%	162	8.1%
4	France	978	8.5%	83	7.2%	1,244	7.1%	88	9.2%	1,767	10.8%	191	9.4%	1,688	9.3%	158	8.0%
5	India	173	-	-	-	599	9.9%	59	6.2%	1,378	9.6%	132	6.5%	1,278	9.6%	123	6.2%
6	Germany	1,994	9.3%	185	16.2%	1,782	5.9%	105	11.0%	2,062	5.8%	120	5.9%	2,059	5.9%	121	6.1%
7	Canada	15,127	0.6%	83	7.2%	17,760	0.6%	98	10.2%	21,211	0.6%	117	5.7%	20,419	0.6%	112	5.7%
8	Australia	501	7.6%	38	3.3%	690	6.7%	46	4.8%	1,362	6.9%	94	4.6%	1,344	6.6%	89	4.5%
9	Spain	328	-	-	-	658	3.0%	20	2.1%	876	11.7%	102	5.0%	835	10.3%	86	4.3%
10	Italy	580	8.8%	51	4.4%	779	6.4%	50	5.2%	1,073	8.3%	89	4.4%	1,029	8.0%	83	4.2%
11	Mexico (AIR ONLY)	1,304	-	-	-	1,878	0.3%	5	0.5%	2,757	2.6%	72	3.5%	2,607	2.7%	70	3.5%
12	Netherlands	473	7.7%	36	3.2%	608	7.3%	44	4.6%	725	3.4%	25	1.2%	699	6.3%	43	2.2%
13	Brazil	941	1.5%	14	1.2%	769	1.1%	8	0.9%	2,209	2.1%	46	2.3%	1,938	1.9%	36	1.8%
14	Colombia	318	-	-	-	419	-	-	-	943	4.1%	39	1.9%	874	4.1%	36	1.8%
15	Sweden	292	6.6%	19	1.7%	397	3.1%	12	1.3%	506	4.7%	24	1.2%	529	4.7%	25	1.3%
16	Argentina	503	3.4%	17	1.5%	318	-	-	-	994	2.2%	22	1.1%	973	2.6%	25	1.3%
17	Japan	5,368	1.1%	59	5.1%	3,250	0.7%	23	2.4%	3,493	0.8%	28	1.4%	3,555	0.7%	24	1.2%
18	Switzerland	410	8.9%	36	3.2%	342	3.8%	13	1.4%	463	3.3%	15	0.8%	458	5.1%	23	1.2%
19	Denmark	145	-	-	-	218	-	-	-	331	-	-	-	330	6.8%	22	1.1%
20	Taiwan	443	4.7%	21	1.8%	295	3.5%	10	1.1%	478	3.9%	19	0.9%	472	4.3%	20	1.0%





What Does This REALLY Mean?

- VAIC visitor volume has doubled since 1997 and more than doubled since 2007 because...
 - Overall visitor volume increased 60+%; and
 - Overall visitor INCIDENCE of VAIC increased about 40%
- But we (smartly) asked, *why did VAIC incidence increase?*
- Overall overseas visitor volume changes, of course, because volumes for each of 230 countries changes.
- But VAIC (or any travel segment) incidence changes for any/all of several reasons...
 - Interest in VAIC is changing consistently across ALL top origin markets;
 - The countries growing in volume are also growing in VAIC incidence (exponential), or both declining;
 - NTTO revised its visitor survey questionnaire.
- Visitor volume to American Indian Communities from overseas countries increased substantially over the past 20 years...
 - mostly* due to overall increases in overseas volume (rising tide lifts all boats);
 - partially* due to increased interest in VAIC, especially from growing countries;
 - a little bit* due to 2012 changes to the survey questionnaire (a mostly stable incidence through 2011 increased in 2012 for several travel activities).



Visit American Indian Community Profile

U.S. Department of Commerce
International Trade Administration
Industry and Analysis



National Travel and Tourism Office

Market Profile:
VISIT AMERICAN-INDIAN COMMUNITY

- Volumes: 1997 through 2018;
- Profiling: 2004 through 2018; 2000;
- Source of data and trends in this presentation;
- More destinations visited listed than in the past;
- Provided as an Excel file so you can cut and paste as necessary!



International Trade Administration • Industry and Analysis • National Travel and Tourism Office



Cross-Visitation Incidence for Other Activities

(% VAIC visitor also participating in activity)

	2000	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	18 O/S
Visit Am. Indian Comm.	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	5
Sightseeing										91	90	90	89	88	90	87	78
Shopping	91	86	94	89	84	88	90	91	90	92	91	91	89	88	89	87	84
National Parks/Monuments										78	75	77	74	74	74	72	34
Small Towns/Countryside	66	66	71	64	59	68	65	65	71	66	64	65	64	61	60	61	26
Historical Locations										64	62	63	61	61	57	58	26
Cultural / Ethnic Herit. Sites										53	54	51	54	50	54	52	15
Art Gallery/Museum	32	41	37	38	34	32	36	45	41	49	51	50	55	49	52	47	28
Amusement/Theme Parks	51	42	44	53	47	46	50	50	54	48	49	52	47	50	43	47	26
Guided Tours	28	35	31	35	35	33	39	41	41	54	49	50	48	46	46	43	21
Dining (Experience Fine)										50	56	52	51	48	45	38	27
Concert/Play/Musical	23	21	24	28	23	25	28	31	28	34	31	28	29	24	27	26	14
Casinos/Gamble	36	35	35	37	39	37	38	39	44	35	34	30	31	29	27	25	7
Sporting Event										22	23	20	22	19	19	19	12
Nightclubbing/Dancing	20	22	17	24	21	20	22	16	21	22	23	22	22	21	19	17	11
Camping/Hiking	16	17	19	11	16	18	22	18	20	16	15	17	16	14	16	14	4
Water Sports										17	18	17	14	15	15	13	8
Environmental/Eco. Excurs.	14	14	15	14	13	16	16	12	14	13	13	15	13	13	13	12	3
Golfing/Tennis	6	6	7	11	6	5	6	4	7	8	7	5	6	4	5	6	3
Snow Sports										3	7	4	5	2	4	4	2
Hunting/Fishing	4	3	5	5	4	5	4	4	5	8	4	6	4	4	3	4	2
Other										2	1	2	1	2	2	1	1





Trip Planning (2018)

Information Sources/ Decision Times	Visit Amer. Indian Comm.	Overseas Travelers to the U.S.	Point Difference
Airline	46%	47%	-1
Personal Recommendations	34%	28%	6
Online Travel Agency	34%	32%	2
Travel Agency Office	21%	19%	2
Travel Guides	17%	11%	6
Decision Timing (days):			
Trip Decision:	123	98	25
Airline Booking:	90	77	13





Selected Key Traveler Characteristics (2018)

Trip / Party Characteristic	Visit Amer. Indian Comm.	Overseas Travelers to the U.S.	Point Difference
Main Purpose of Trip: Vacation	70%	59%	11
Main Purpose of Trip: VFR	15%	18%	-3
# of Nights in U.S.: Mean	28	18	10
# of Nights in U.S.: Median	15	9	6
% 1st-Time U.S.	31%	23%	8
Visited Only 1 State	47%	74%	-27
Avg # of States Visited	2.2	1.4	0.8
1+ Night in Hotel/Motel	75%	76%	-1





Top Ports Of Entry (2018)

		VAIC O/S	
Los Angeles, CA	LAX	21	12
New York, NY	JFK	16	18
San Francisco, CA	SFO	11	6
Miami, FL	MIA	8	13
Agana, GU	GUM	4	4
Chicago, IL	ORD	4	4
Newark, NJ	EWR	3	5
Dallas/Ft. Worth, TX	DFW	3	2
Las Vegas, NV	LAS	3	2
Honolulu, HI	HNL	3	6
Seattle, WA	SEA	3	2
Washington, DC	IAD	3	3
...			
Orlando, FL	MCO	1	5
all other		18	20

All other VAIC ports had less than 3% share of total VAIC visitors.



Transportation Modes

(2018)

Transportation Modes in U.S.	Visit Amer. Indian Comm.	Overseas Travelers to the U.S.	Point Change
Rented Auto	40%	30%	10
Auto: Private or Company	39%	33%	6
Airlines between U.S. Cities	35%	26%	9
City Subway/Tram/Bus	33%	30%	3
Taxicab/Limousine	26%	28%	-2
Bus Between Cities	26%	17%	9%





Top States Visited (2018)

	VAIC	O/S
California	44	21
Nevada	30	8
Las Vegas	28	8
New York	25	27
Arizona	19	3
Florida	14	24
Utah	11	2
Washington, D.C.	8	5
Illinois	6	4
Texas	5	5
Massachusetts	5	5
Colorado	5	1
Guam	4	4
Hawaii	4	8

All other VAIC states had less than 4% share of total VAIC visitors



Comparing VAIC Visitors' Countries of Origin

	Visit American Indian Community	16-18 UK VAIC	16-18 Germany VAIC	16-18 Italy VAIC
Advance trip decision: mean days	123	179	182	152
Advance trip decision: median days	90	150	180	120
Advance airline booking: mean days	90	145	131	118
Advance airline booking: median days	60	120	112	100
Used package on trip (% yes)	16	18	9	32
Pre-booked lodging: (% yes)	68	73	76	78
used travel agent to pre-book (% yes)	12	10	21	35
Traveling alone	46	40	38	25
Traveling with spouse/partner	30	46	37	55
Nights in USA: mean	28	24	27	18
Nights in USA: median	15	15	19	14
1st trip to USA (% yes)	31	18	21	48
Main trip purpose: % vacation/holiday	70	79	81	89
Number of U.S. states visited: (1 state)	47	41	31	28
Number of U.S. states visited: mean	2	2	3	3
Number of U.S. states visited: median	2	2	3	3
Rented auto in the U.S. (% yes)	40	39	68	55
% Visited: New York City	24	16	21	36
% Visited: Florida	14	13	21	12
% Visited: Miami	8	6	15	9
% Visited: Orlando	6	7	5	3
% Visited: Arizona	19	19	26	36
% Visited: Nevada	30	41	36	49
% Visited: Las Vegas	28	40	35	47
% Visited: Utah	11	13	23	28
% Activity: amusement/theme parks	47	30	34	34
% Activity: casinos/gamble	25	38	26	34
% Activity: tour operator/travel club	13	18	6	21
% Activity: travel agency office	21	19	31	46
% Activity: historical locations	58	72	72	59
% Activity: national parks/monuments	72	80	87	74
% Activity: small towns/countryside	61	73	81	71

- Country profiles differ...
VAIC country profiles differ, too.
- Here are some select characteristics where countries differ VS. all VAIC. Cells colored blue are higher than VAIC...cells colored red are lower.
- Key take away: get to know NTTO's **Visit American Indian Community** visitor profile...get to know your GM and Aianta staff who can provide even more details on visitors to your communities.



Key Takeaways

Global travel remains VERY robust;

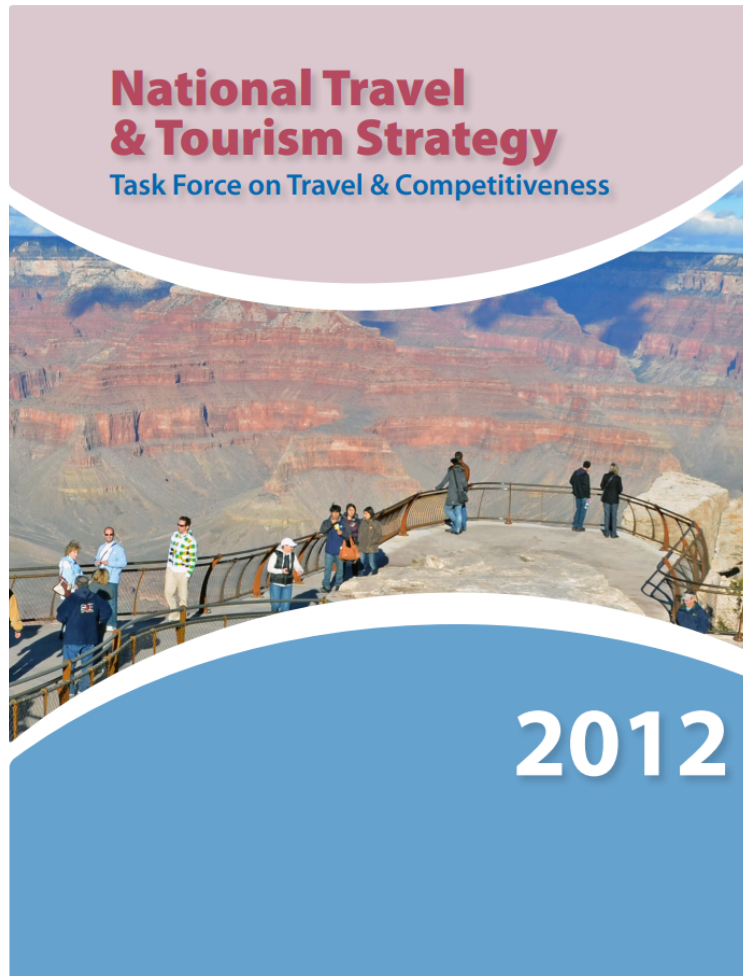
NTTO Forecast calls[ed] for a rebound in volume in 2018 to a new record and continue through 2022. Four countries will account for half the growth over the forecast period – Canada, China, South Korea and Mexico. 2018 and 2019 YTD actual may change the 2019 fall forecast update.

VAIC visitor volume has increased over the past several years due to overseas overall volume increases, increases in VAIC incidence, and a minor change in survey questionnaire wording.

The combination of these factors have **changed the ranking of top markets** for VAIC communities to South Korea, China, U.K., and France.

Visit American Indian Community profile at travel.trade.gov available **now!**

Update on National Strategy Goals...



- Tourism Policy Council Adopts New Goal
 - *116m Visitors by 2028
 - *Spending \$445 Billion Annually
- Revising National Strategies
- Promoting More Destinations and Experiences
- Working to Facilitate Travel



For More Info: <https://travel.trade.gov>

Thank you!

julie heizer

Deputy Director

National Travel & Tourism Office

U.S. Department of Commerce

Phone: 202 482 4904

julie.heizer@trade.gov

