

# TOP INTERNATIONAL MARKETS FOR NATIVE AMERICAN TOURISM



THE 19TH ANNUAL  
AMERICAN INDIAN TOURISM CONFERENCE  
**2017**  
SEPTEMBER 11-14  
RADISSON HOTEL & CONFERENCE CENTER  
GREEN BAY, WISCONSIN

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Industry & Analysis, International Trade Administration  
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## National Travel & Tourism Office

**NATIONAL TRAVEL  
AND TOURISM OFFICE**

Primary POC within the Federal  
Government

NTTO Website &  
Publications/Outreach

Research, Key Market  
Intelligence & National Strategy

Principal Liaison to Brand USA

Represents U.S. Travel and  
Tourism Policy internationally

## International Trade Administration Travel and Tourism Resources

### Foreign Commercial Service

128 Offices in 75 countries

[www.trade.gov/cs/](http://www.trade.gov/cs/)  
[www.export.gov/industry/travel/](http://www.export.gov/industry/travel/)

### National Travel & Tourism Office

[travel.trade.gov](http://travel.trade.gov)

### U.S. Commercial Service Domestic Field

Offices in more than 100  
U.S. cities

[www.trade.gov/cs/](http://www.trade.gov/cs/)  
[www.export.gov/industry/travel/](http://www.export.gov/industry/travel/)

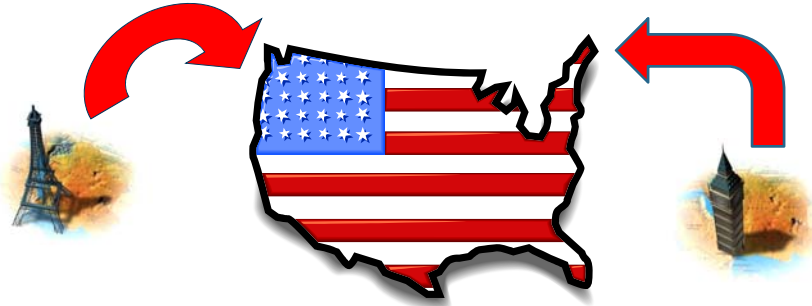
## Market Develop Cooperator Program (MDCP)

- The Cooperator Program provides financial and technical assistance from ITA to support projects that enhance the global competitiveness of U.S. industries.
- Partnership with ITA and non-profit industry groups like trade associations and chambers of commerce.
- Industry Groups pledge to pay a minimum of two-thirds of the project costs on sustainable projects
- Award Limits: \$500,000. Awards up to 3 years
- AIANTA was awarded a MDCP to work on promoting U.K. & Italian travel to Indian Country in 2016



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## Travel Trends to the U.S.



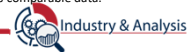
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## U.S. Visitors & Spending Trends



Sources: Department of Commerce, National Travel and Tourism Office; Department of Commerce, Bureau of Economic Analysis; Statistics Canada; Banco de Mexico.

Note: The Bureau of Economic Analysis revised the definition of travel exports (spending) in 2014 to better align with international standards. In general, this revision increased U.S. travel exports by 20%. The timeline shown includes the revisions back to 1999 and thus represents comparable data.





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## 2016 Top Origin Markets for Traveler Spending (Exports) to/in the U.S.

Origin of the Visitor	2016 \$ in Mils	% change 15/16	% change 07/16
Total Travel Exports	\$244.7	-1%	70%
Overseas	\$203.7	0%	86%
China <sup>(1)</sup>	\$33.0	9%	588%
Canada	\$20.9	-8%	18%
Mexico <sup>(1)</sup>	\$20.2	3%	21%
Japan	\$16.1	-7%	14%
United Kingdom	\$16.0	-4%	13%
India <sup>(1)</sup>	\$13.6	14%	139%
Brazil	\$11.0	-20%	182%
Australia	\$8.7	-7%	118%
South Korea <sup>(1)</sup>	\$8.6	4%	87%

Source: U.S. Department of Commerce, Bureau of Economic Analysis  
(1) record year for travel spending in 2016



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## Top 10 International Arrival Markets in 2016

Country of Residence	2016 (Mils)	2015/16 % change	2007/16 % change
Canada	19.3	-7%	9%
Mexico <sup>(1)</sup>	18.7	2%	29%
United Kingdom	4.6	-7%	2%
Japan	3.6	-5%	1%
China <sup>(1)</sup>	3.0	15%	648%
Germany	2.0	-10%	34%
South Korea <sup>(1)</sup>	2.0	12%	145%
Brazil	1.7	-24%	165%
France	1.6	-7%	63%
Australia	1.3	-7%	101%

(1) record year for travel spending in 2016





## Top International Arrivals to the U.S. 2017

Country	Jan-April 2017 arrivals in (000)	% change 2016/2017	2017 Rank in total arrivals
Total Arrivals	22,233	-1%	---
Canada	6,459	8%	1
Mexico	5,395	-5%	2
United Kingdom	1,196	-7%	3
Japan	1,133	-2%	4
China	854	-1%	5
South Korea	706	19%	6
Germany	556	-1%	7
Brazil	493	-13%	8
France	475	1%	9
Italy	266	7%	12



# AIANTA

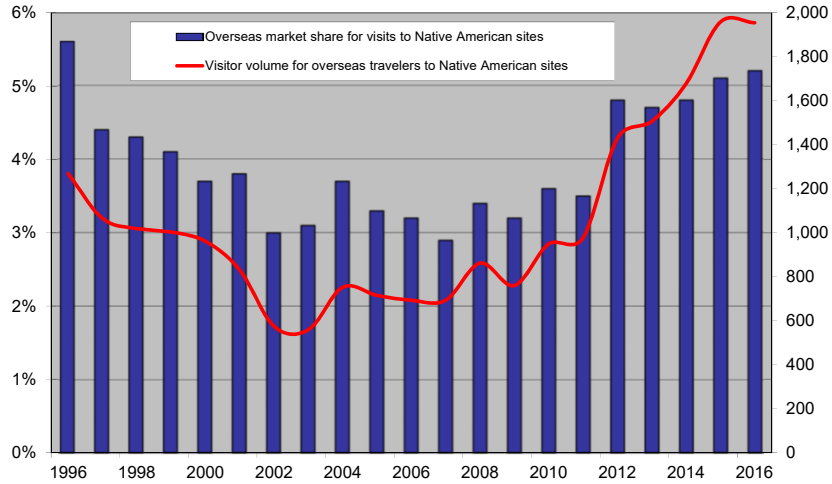
American Indian Alaska Native  
Tourism Association

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



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## Trends in Total Overseas \* Visitors to American Indian Communities (1996-2016)



\* Overseas includes all countries except Canada & Mexico



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## Visiting American Indian Communities: Regions of Origin in 2016

Region/ Country of Residence	Visit Amer. Indian Comm. 2016 (000)	2015/16 % change
Overseas	1,995	0%
Europe	883	0%
Asia	601	13%
South America	149	19%
Oceania/Pacific	104	-47%





## Visiting American Indian Communities: Country of Origin in 2016

Region/ Country of Residence	Visit Amer. Indian Comm. 2016 (000)	2015/16 % change
Overseas	1,955	0%
China	214	-10%
South Korea	188	44%
United Kingdom	178	-2%
Germany	136	5%
France	134	-18%
Italy	76	-7%



## Visiting American Indian Communities: Country of Origin 2007 vs. 2016

Region/ Country of Residence	Visit Amer. Indian Comm. 2016 (000)	2007/16 % change
Overseas	1,955	182%
China	214	1026%
South Korea	188	889%
United Kingdom	178	28%
Germany	136	143%
France	134	153%
Italy	76	105%



*Information Sources & Trip Decision Times by Overseas Visitors to the USA compared to Visitors to American Indian Communities 2016*

<b>Information Sources/ Decision Times</b>	Visit Amer. Indian Comm.	Overseas Travelers to the U.S.	Point Change
Airline	41%	44%	-3%
Personal Recommendations	38%	28%	10%
Online Travel Agency	36%	32%	4%
Travel Agency Office	25%	20%	5%
Travel Guides	19%	12%	7%
<b>Decision Timing (days):</b>			
Trip Decision:	125	98	27
Airline Booking:	90	73	17



*Selected Key Traveler Characteristics Overseas Visitors to the USA compared to Visitors to American Indian Communities 2016*

<b>Trip / Party Characteristic</b>	Visit Amer. Indian Comm.	Overseas Travelers to the U.S.	Point Change
Purpose of Trip: Vacation	83%	68%	15%
Purpose of Trip: VFR	33%	30%	3%
# of Nights in U.S.: Mean	26	18	8
# of Nights in U.S.: Median	15	10	5
% 1st-Time U.S.	37%	24%	13%
Visited Only 1 State	40%	73%	-33%
Ave # of Destinations Visited	3.5	2.1	1.4
1+ Night in Hotel/Motel	78%	78%	0%







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## Top Ports Of Entry by Overseas Travelers to the U.S. & Native American Sites - 2016

Visit Amer. Indian Comm.	Overseas Travelers to the U.S.
<b>LAX - 21%</b>	JFK - 17%
JFK - 16%	MIA - 13%
MIA - 10%	LAX - 11%
<b>SFO - 9%</b>	HNL - 6%
EWR - 5%	SFO - 6%
GUM - 5%	EWR - 5%
ORD - 5%	ORD - 4%
<b>LAS - 4%</b>	MCO - 4%
HNL - 3%	GUM - 4%
<b>SEA - 3%</b>	4 ports - 3%

The ports listed had at least a 3% share of arrivals



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## Transportation Used by Overseas Visitors to the USA compared to Visitors to American Indian Communities 2016

Transportation Modes in U.S.	Visit Amer. Indian Comm.	Overseas Travelers to the U.S.	Point Change
Rented Auto	44%	33%	11%
Airlines between U.S. Cities	40%	29%	11%
Auto Private or Company	37%	33%	4%
City Subway/Tram/Bus	34%	31%	3%
Taxicab/Limousine	32%	31%	1%
Bus Between Cities	24%	17%	7%





## Top States Visited by Overseas Travelers to the U.S. & Native American Sites - 2016

1.955 million overseas visitors	37.5 million visitors
Visit Amer. Indian Comm.	Overseas Travelers to the U.S.
<b>California (44%)</b>	New York (27%)
<b>Nevada (35%)</b>	Florida (25%)
New York (29%)	California (22%)
Florida (18%)	Nevada (9%)
<b>Arizona (18%)</b>	Hawaii (8%)
<b>Utah (10%)</b>	Texas (5%)
Hawaii (6%)	Massachusetts (4%)
Massachusetts (6%)	Guam (4%)
Illinois, Guam, & <b>Colorado</b> (5%)	Illinois (4%)
<b>WA / TX / LA / WY</b> (4%)	

\* Only states with at least 4% market share are shown



## Activity Participation Overseas Visitors to the USA compared to Visitors to American Indian Communities 2016

Activities	Visit Amer. Indian Comm.	Overseas Travelers to the U.S.	Point Change
Visit American Indian Communities	100%	5%	95%
Sightseeing	88%	78%	10%
Shopping	88%	86%	2%
National Parks/Monuments	74%	35%	39%
Small Towns/Countryside	61%	27%	34%
Historical Locations	61%	27%	34%
Cultural/Ethnic/Heritage Sites	50%	15%	35%
Amusement/Theme Park	50%	29%	21%
Art Galleries/Museums	49%	28%	21%
Experience Fine Dining	48%	32%	16%





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