

# 2014

## U.S. Commercial Service Global Travel and Tourism Team



Expanding U.S. Travel and  
Tourism exports under the  
National Export Initiative



The **U.S. Commercial Service Global Travel & Tourism Team** of the International Trade Administration, U.S. Department of Commerce, serves to expand U.S. travel and tourism exports through trade counseling and matchmaking programs for U.S. travel and tourism destinations and suppliers to reach foreign wholesale buyers of U.S. travel. In so doing, the Team supports the President's National Export Initiative (NEI), the Travel Promotion Act and the National Travel and Tourism Strategy created by Executive Order. The NEI calls for export promotion of U.S. service industries as part of the program to double U.S. exports within five years and support 2 million U.S. jobs, recognizing that travel and tourism is America's largest service export. The Travel & Tourism Team has over 150 members in the domestic and overseas field offices of the U.S. Commercial Service, in all regions of the United States and nearly every state, and in 65 countries. The team also includes senior staff from the National Travel and Tourism Office.

For more information on the Global Travel & Tourism Team please visit:

<http://www.export.gov/industry/travel>

Here you will find links to full market research reports, current programs and events updates, upcoming educational webinars and webinar recordings, client testimonials on our YouTube channel, data and policy issues and much more.

We are pleased to present this resource guide to you and look forward to assisting you in attracting more foreign visitors to the United States!

Sincerely,

The Global Travel & Tourism Team

Dr. Anastasia Xenias, Team Leader

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## How We Help You Attract International Visitors

Destinations, attractions, CVBs, tour operators, hotels and others in the travel industry seeking to build international tourism can access the following market development programs through **your local travel specialist**.

### Make the Most out of International Sales Calls

Are you planning an international sales trip to find distribution partners or hire a sales representative? The Commercial Service can save you time and money by pre-qualifying buyers based on your individual needs, setting up a day of one-on-one appointments, arranging transportation and logistics and getting you in the door to the people you want to meet. This flagship service, known as a Gold Key, allows you to make the most of your international visits. This service is priced between \$350 and \$2,300 depending on the size of your company.

### Find Travel Distribution Partners in Target Market

Looking to find qualified tour operators, wholesalers, agents, sales representatives, or partners? This service gives you a list with complete contact details of up to five qualified overseas contacts that have examined your materials and have a strong interest in including your destination, products, or services in its distribution network. This service, also known as the International Partner Search, is priced between \$350 and \$1,400 depending on the size of your company.

### Develop Memorable Promotional and Educational Events

Do you want to make a PR splash or impress travel agents and tour operators? Use the Commercial Service to help you identify your target audience, plan a high-profile event, manage on site logistics and access unique facilities like embassy meeting space and ambassadors' residences. The Commercial Service can also help you hold an educational seminar, reception, exhibition or other event to build your international presence.

### Increase Traffic at Your Trade Show Booths

The Global Travel & Tourism Team offers a variety of services at major travel industry events, including ITW, ITB Berlin, World Travel Market and more. Our trade event services include arranging appointments with international buyers, developing press awareness, assisting with booth logistics including translation services. If you are exhibiting internationally, check with our Travel & Tourism Team to see what support is available to you.

## Access Trade and Consumer Media

Our Commercial Specialists can get you into contact with international media; hold a PR event, media briefing, or pitch your stories to individual reporters with the help of our in-country contacts.

## Recruit Qualified FAM Participants

Bringing qualified tour operators and media is important to build awareness of your product and provide first-hand training to potential distribution partners. Work with our foreign posts to develop invitations, create lists of top targets, recruit participants, and even lead the delegation through a tour of your destination.

## Develop an Effective Marketing Plan

If you are just beginning to target international travelers or are looking to expand your efforts into new markets, our specialists can help you. Organized in a team of travel experts, the Global Travel & Tourism Team has members located across the U.S. and in embassies and consulates worldwide. Team members can help you identify top international tour operators and travel agents, promote your destination to the travel trade and consumer media, and get the most out of international trade shows.

## Access the Most Up-to-Date Travel Market Research

The Commercial Service can provide your company with the research needed to target the appropriate market(s) for your products and develop marketing plans. In addition to existing off-the-shelf research, the Commercial Service can prepare a tailored analysis of the market for your product. Visit our market research library at <http://www.Export.gov>, or utilize <http://www.buyusainfo.net/>. The National Travel and Tourism Office (NTTO) provides additional research on international visitation, spending data and more.

## Profile Your Potential International Partners

Looking for background information on a potential buyer or agent? Using this service, you can request specific answers to detailed questions about potential customers or partners abroad that will reduce your risk and allow you to enter new business relationships with confidence.

## Keep Up with Emerging Markets and Industry Trends via Webinars

The Global Travel & Tourism Team offers online webinars on key issues facing the travel industry and information on key markets.

These webinars will feature industry experts and provide you with the opportunity to ask questions. We will be announcing the dates of these webinars, so check back here to register for these events.

## Global Travel and Tourism Team FY2014 Trade Events Program

For more information and additional programs please see [www.export.gov/industry/travel](http://www.export.gov/industry/travel)

### Brazil

[Visit USA 2014](#) Trade Fair in Sao Paulo and Rio de Janeiro, Brazil 5/12-23/2014. Contact: [jussara.haddad@trade.gov](mailto:jussara.haddad@trade.gov) or [thales.demarchi@trade.gov](mailto:thales.demarchi@trade.gov)

### Canada\*

[International Tourism and Travel Show - U.S. Pavilion](#) Trade Fair in Montreal, Canada 10/25-27/2013. Contact: [sue.bissi@trade.gov](mailto:sue.bissi@trade.gov)

[Canadian Traveller's 2014 TravXchange Shows](#) Toronto 9/29/2014: Show & Discover America Day Media Marketplace, Montreal 9/30/2014, Calgary 10/1/2014, Vancouver 10/2/2014: Show & Media Morning. Contact: [exhibit@travxchange.com](mailto:exhibit@travxchange.com) or 1-866-699-9933, ext. 222

### Chile

[Visit USA Show Chile](#) Travel Promotion Event Santiago 5/15-16/2014. Contact: [Isabel.valenzuela@trade.gov](mailto:Isabel.valenzuela@trade.gov)

### China

\*[Asia Golf Show 2013/PGA Merchandise Show Asia 2013](#) Certified Trade Fair in Guangzhou, China 12/1-3/2013. Contact: [yao.hou@trade.gov](mailto:yao.hou@trade.gov)

[China Golf Show/PGA Merchandise Show China 2014](#) Certified Trade Fair in Beijing, China 3/13-16/2014. Contact: [jing.wei@trade.gov](mailto:jing.wei@trade.gov)

[China Outbound Travel & Tourism Market](#) Trade Promotion Event in Beijing, China 4/9-11/2014. Contact: [jing.wei@trade.gov](mailto:jing.wei@trade.gov)

[G2E Asia 2014](#) Trade Fair in Hong Kong, China 5/27-29/2014. Contact: [sweekeng.cheong@trade.gov](mailto:sweekeng.cheong@trade.gov)

[Beijing International Tourism Expo](#) Trade Promotion Event in Beijing, China 6/21-23/2014. Contact: [jing.wei@trade.gov](mailto:jing.wei@trade.gov)

### Greece

\*[Philoxenia 2013 - "Discover America" Literature Promotion Program](#) Trade Promotion Event in Thessaloniki, Greece 11/28-12/1/2013. Contact: [irene.ralli@trade.gov](mailto:irene.ralli@trade.gov)

### India

\*[Travel and Tourism Fair \(TTF\) 2014](#) Trade Fair in Mumbai, India 2/11-14/2014. Contact: [aliasgar.motiwala@trade.gov](mailto:aliasgar.motiwala@trade.gov) or [sandeep.maini@trade.gov](mailto:sandeep.maini@trade.gov)

### Italy

\*[TTG Incontri 2013](#) Certified Trade Fair in Rimini, Italy 10/17-19/2013. Contact: [michael.richardson@trade.gov](mailto:michael.richardson@trade.gov)

\*[Showcase USA-Italy 2014](#) Trade Promotion Event in Milan, Italy 3/3-4/2014. Contact: [michael.richardson@trade.gov](mailto:michael.richardson@trade.gov)

## Japan

[Brand USA Pavilion at JATA Tourism EXPO Japan 2014](#) Certified Trade Fair in Tokyo 9/25-28/2014  
Contact: [tamami.honda@trade.gov](mailto:tamami.honda@trade.gov)

## Kazakhstan

\*[Kazakhstan Education and Tourism Fairs](#) in Almaty and Shymkent, Kazakhstan October 19-20, 2013. Contact: [aliya.shaikhina@trade.gov](mailto:aliya.shaikhina@trade.gov)

## Mexico

\*[Business Week by ExpoVacaciones 2014](#) Trade Promotion Event in Mexico City, Mexico 2/11-12/2014. Contact: [juancarlos.ruiz@trade.gov](mailto:juancarlos.ruiz@trade.gov) or [rebecca.torres@trade.gov](mailto:rebecca.torres@trade.gov)

[ARLAM 2014](#) Trade Promotion Event in Monterrey, Mexico 5/14/2014. Contact: [yazmin.rojas@trade.gov](mailto:yazmin.rojas@trade.gov) or [john.howell@trade.gov](mailto:john.howell@trade.gov)

## Netherlands

\*[VAKANTIEBEURS 2014](#) Certified Trade Fair in Utrecht, the Netherlands 1/14-19/2014.  
Contact: [philip.hammerstein@trade.gov](mailto:philip.hammerstein@trade.gov)

## Russia

[U.S. Pavilion at MITT 2014](#) Trade Promotion Event in Moscow, Russia 3/19-22/2014.

Contact: [gulnara.kenzhebulatova@trade.gov](mailto:gulnara.kenzhebulatova@trade.gov) or [ken.walsh@trade.gov](mailto:ken.walsh@trade.gov)

[Visit USA Booth at Moscow International Ski Salon 2014](#) Trade Promotion Event in Moscow, Russia 10/25-27/2014. Contact: [gulnara.kenzhebulatova@trade.gov](mailto:gulnara.kenzhebulatova@trade.gov)

## Taiwan

[Taiwan Tourism Exposition 2014](#) Trade Fair in Taipei, Taiwan 5/23-26/2014. Contact: [meimei.wang@trade.gov](mailto:meimei.wang@trade.gov)

## Singapore

[NATAS Travel 2014](#) in Singapore, August 2014 (Dates to be confirmed)

[ITB Asia](#) Trade Show for the Asian Travel Market in Singapore 10/29-31/2014

## Ukraine

[U.S. Product Literature Center at UITT'2014](#) Catalog Event in Kyiv, Ukraine 3/26-28/2014.  
Contact: [olena.stephanska@trade.gov](mailto:olena.stephanska@trade.gov)

## United Arab Emirates

[Arabian Travel Market 2014](#) Trade Fair in Dubai, United Arab Emirates 5/6-9/2014. Contact: [manal.elmasry@trade.gov](mailto:manal.elmasry@trade.gov)

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## Trade Missions

[Travel and Tourism Trade Mission to Taiwan, Japan and Korea](#) Trade Mission to Taipei, Tokyo and Seoul 3/10-15/2014. Contact: [anastasia.xenias@trade.gov](mailto:anastasia.xenias@trade.gov) or [stephen.anderson@trade.gov](mailto:stephen.anderson@trade.gov) or [scott.pozil@trade.gov](mailto:scott.pozil@trade.gov) or [keenton.chiang@trade.gov](mailto:keenton.chiang@trade.gov)

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## Webinars

[Understanding the Shifts in the 2012 Overseas Travel to the United States](#), 11/7/2013  
netreplay recording available until 11/2014.  
Contact [ron.erdmann@trade.gov](mailto:ron.erdmann@trade.gov) or [anastasia.xenias@trade.gov](mailto:anastasia.xenias@trade.gov)

[International Travel to the United States Forecast 2014-2019](#), 12/15/2013 netreplay recording available until 12/2014. Contact [ron.erdmann@trade.gov](mailto:ron.erdmann@trade.gov) or [anastasia.xenias@trade.gov](mailto:anastasia.xenias@trade.gov) [TBC]



[Understanding the Canadian MICE Travel](#)

[Market](#), 1/20/2014 netreplay recording available until 1/2015. Contact [ron.erdmann@trade.gov](mailto:ron.erdmann@trade.gov) or [anastasia.xenias@trade.gov](mailto:anastasia.xenias@trade.gov) [TBC]

[Understanding the Arabian Travel Market](#),

3/10/2014 netreplay recording available until 3/2015. Contact [ron.erdmann@trade.gov](mailto:ron.erdmann@trade.gov) or [anastasia.xenias@trade.gov](mailto:anastasia.xenias@trade.gov) [TBC]

[Understanding the Indian Travel Market](#),

5/10/2014 netreplay recording available until 5/2015. Contact [ron.erdmann@trade.gov](mailto:ron.erdmann@trade.gov) or [anastasia.xenias@trade.gov](mailto:anastasia.xenias@trade.gov) [TBC]

[Understanding the Brazilian Travel Market](#),

7/15/2014 netreplay recording available until 7/2015. Contact [ron.erdmann@trade.gov](mailto:ron.erdmann@trade.gov) or [anastasia.xenias@trade.gov](mailto:anastasia.xenias@trade.gov) [TBC]



## Global Travel & Tourism Team Golf America Initiative

The U.S. Department of Commerce, International Trade Administration Global Travel & Tourism Team is implementing a worldwide golf initiative. The main purpose of this initiative is to increase golf tourism from foreign markets into the United States. According to the World Golf Foundation, golf was a \$68.8 billion industry in 2011, with golf related travel expenditures exceeding \$20 billion and a total impact on the U.S. economy of over \$167 billion supporting 1.98 million U.S. jobs. With golf becoming an Olympic sport in 2016, the game is expected to expand significantly worldwide.

### Strategy:

Through the coordination of the Travel and Tourism Team, the U.S. Commercial Service will leverage its network of Export Assistance Centers throughout the United States to identify export ready golf destinations and resorts, golf associations, state tourism representatives and visitor bureaus actively promoting their golf destinations. The U.S. Commercial Service through its worldwide network of commercial specialists in U.S. consulates and embassies around the world will identify and target golf tour operators and golf travel writers in their prospective markets to promote U.S. golf destinations.

### Initiatives:

Market Intelligence and Counseling - Identify target markets for in-bound international golf tourism and increase awareness of market entry strategies for golf tourism.

Highlight Trade Events – Create USA pavilions at key international golf trade events such as IGTM, Asia Golf and China Golf and facilitate increased international participation in domestic U.S. trade shows such as the annual IAGTO conference and the PGA show

Single Destination Promotions – Work with U.S. embassies to host an overseas buyer reception for US golf destinations.

Virtual FAM Tours- Host video conference receptions or webinars on specific golf destinations to increase awareness of U.S. golf destinations in coordination with Visit USA committees around the world. U.S. destinations will have the opportunity to make video presentations and conduct Q&A on their specific states with invited foreign golf tour operators and golf writers in targeted overseas markets.

The team will work in coordination with organizations active in the golf industry such as Reed Exhibitions, IAGTO (The International Association of Golf Tour Operators), The World Golf Foundation, and the PGA (Professional Golfers Association) to facilitate their mission of increasing golf participation and tourism.

## U.S. Travel And Tourism Balance Of Trade

Receipts (Exports) and Payments (Imports) 2003-2012 [Millions of U.S. Dollars]

Receipts (Exports)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Total</b>	<b>\$80,250</b>	<b>\$93,397</b>	<b>\$102,769</b>	<b>\$107,825</b>	<b>\$122,542</b>	<b>\$141,380</b>	<b>\$120,290</b>	<b>\$134,450</b>	<b>\$152,315</b>	<b>\$165,574</b>
% Change	-4%	16%	10%	5%	14%	15%	-15%	12%	13%	9%
<b>Travel</b>	<b>\$65,159</b>	<b>\$75,465</b>	<b>\$82,160</b>	<b>\$86,187</b>	<b>\$97,355</b>	<b>\$110,423</b>	<b>\$94,187</b>	<b>\$103,463</b>	<b>\$115,552</b>	<b>\$126,214</b>
% Change	-3%	16%	9%	5%	13%	13%	-15%	10%	12%	9%
<b>Passenger Fares</b>	<b>\$15,091</b>	<b>\$17,932</b>	<b>\$20,609</b>	<b>\$21,638</b>	<b>\$25,187</b>	<b>\$30,957</b>	<b>\$26,103</b>	<b>\$30,987</b>	<b>\$36,763</b>	<b>\$39,360</b>
% Change	-7%	19%	15%	5%	16%	23%	-16%	19%	19%	7%
Payments (Imports)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Total</b>	<b>\$78,436</b>	<b>\$90,468</b>	<b>\$95,119</b>	<b>\$99,605</b>	<b>\$104,808</b>	<b>\$112,335</b>	<b>\$99,249</b>	<b>\$102,761</b>	<b>\$109,308</b>	<b>\$118,105</b>
% Change	0%	15%	5%	5%	5%	7%	-12%	4%	6%	8%
<b>Travel</b>	<b>\$58,311</b>	<b>\$66,738</b>	<b>\$69,930</b>	<b>\$72,959</b>	<b>\$77,127</b>	<b>\$80,494</b>	<b>\$74,132</b>	<b>\$75,505</b>	<b>\$78,229</b>	<b>\$83,451</b>
% Change	-2%	14%	5%	4%	6%	4%	-8%	2%	4%	7%
<b>Passenger Fares</b>	<b>\$20,125</b>	<b>\$23,730</b>	<b>\$25,189</b>	<b>\$26,646</b>	<b>\$27,681</b>	<b>\$31,841</b>	<b>\$25,117</b>	<b>\$27,256</b>	<b>\$31,079</b>	<b>\$34,654</b>
% Change	5%	18%	6%	6%	4%	15%	-21%	9%	14%	12%
Balance of Trade	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Balance of Trade</b>	<b>\$1,814</b>	<b>\$2,929</b>	<b>\$7,650</b>	<b>\$8,220</b>	<b>\$17,734</b>	<b>\$29,045</b>	<b>\$21,041</b>	<b>\$31,689</b>	<b>\$43,007</b>	<b>\$47,469</b>

**Travel:** These accounts cover purchases of goods and services by U.S. persons traveling abroad and by foreign travelers in the United States for business or personal reasons. These goods and services include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit. U.S. travel transactions with both Canada and Mexico include border transactions, such as day trips for shopping and sightseeing.

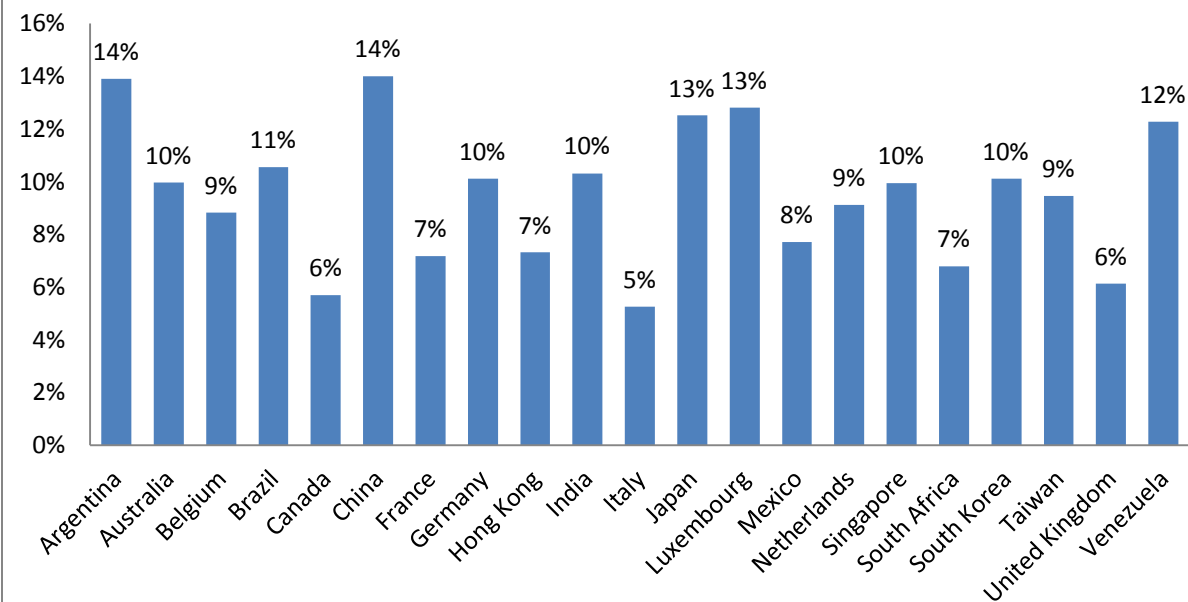
**Passenger Fares:** These accounts cover the fares received by U.S. air carriers from foreign residents for travel between the United States and foreign countries and between two foreign points, the fares received by U.S. vessel operators for travel on cruise vessels, and the fares paid by U.S. residents to foreign air carriers for travel between the United States and foreign countries and foreign vessel operators for travel on cruise vessels.

*\*Source: U.S. Department of Commerce, National Travel and Tourism Office Industries from the Bureau of Economic Analysis, December 2013*

## Monthly U.S. Travel and Tourism Exports (Receipts)



## Total Spending by International Visitors 2012 Growth Rates



\*Source: U.S. Department of Commerce, National Travel and Tourism Office, Industries from the Bureau of Economic Analysis, December 2013

# Discover Global Markets

## International Travel and Tourism Market Snapshots



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Brief summary of market research from the U.S. Commercial Service with data  
from the National Travel and Tourism Office

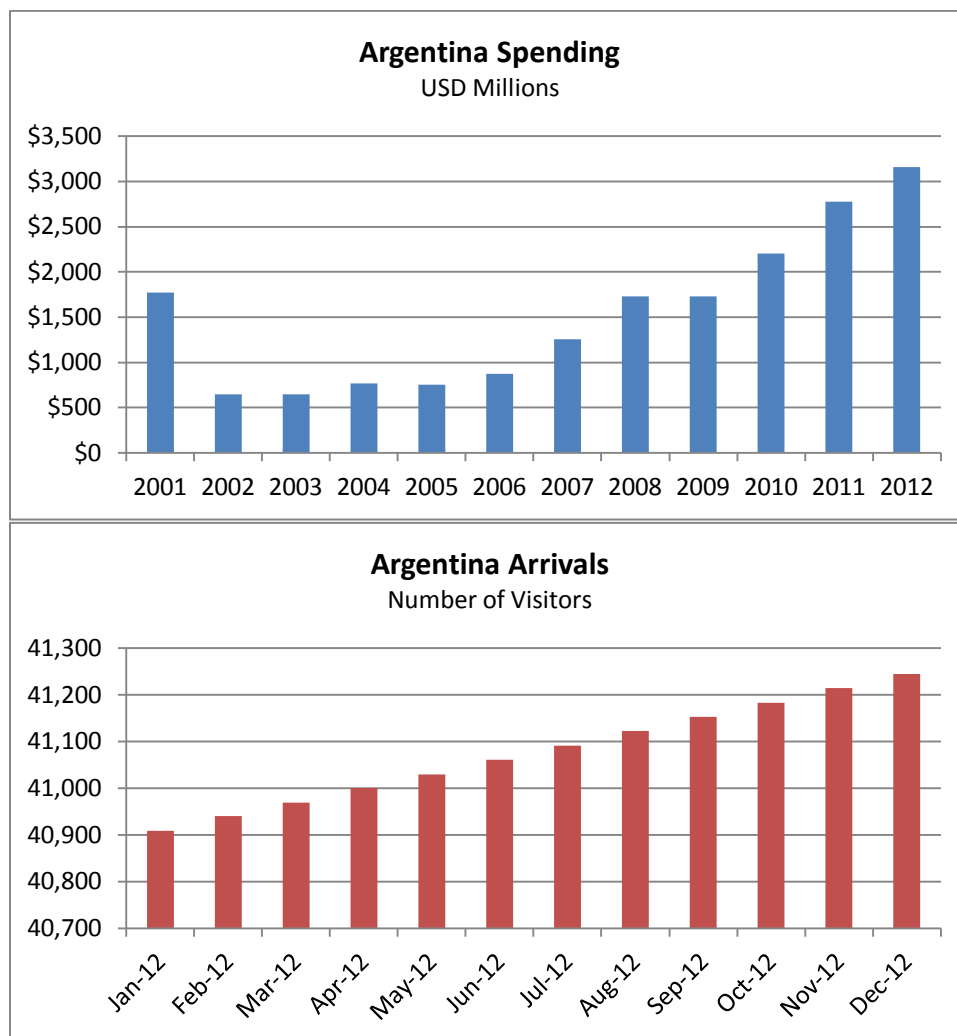
[www.export.gov/industry/travel](http://www.export.gov/industry/travel)

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## Argentina

Historically, Argentines have traveled frequently to the United States. During 2012, over 600,000 Argentines visited the United States resulting in a 20% growth. According to the Department of Commerce's Bureau of Economic Analysis, it was estimated that each Argentine spends US\$ 5,000 (including airfare generated by U.S. carriers), creating an economic impact of nearly US\$ 2.7 billion. The total amount of passengers to the United States has grown immensely in the past few years, and it continues to grow. Between January and April of 2013 growth was excellent, resulting in 19 % growth when compared to the same months in 2012.

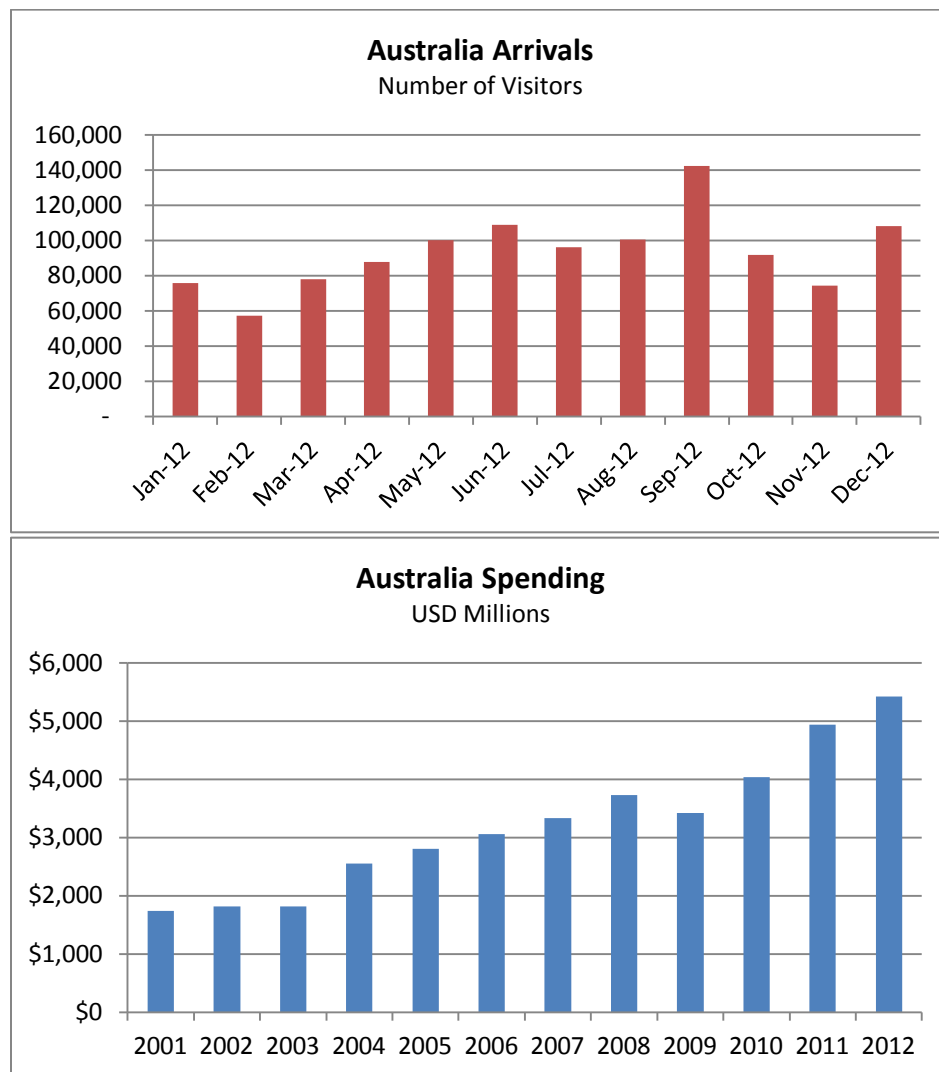
Argentines travel during their summer holidays (December-February) and winter school holidays (July). Some schools also have spring holidays during in mid to late September in which short trips abroad are not uncommon. Top Argentine destinations are New York City, Florida (Miami and Orlando), Washington DC, Chicago, and the State of California. U.S. gateways for Argentines are Atlanta, Dallas, Houston, Miami, and New York.



*\*Source Data: National Travel and Tourism Office ITA/DOC*

## Australia

Australians are traveling to and spending money in the United States in record numbers. Australia is the eighth-largest market in terms of visitor spending and the tenth-largest market for inbound travel to the United States. In 2012, Australians spent a record US\$ 5.5 billion in the U.S. In 2013, it is forecasted that Australian travel will have increased 6% to 1.19 million visitors. Australia has posted nine years of continued growth and record arrivals. Few international markets have this steady record of growth. It is estimated that between 2012-2018 Australian travel to the United States will grow by 33 percent (the 4th largest growth rate of the top ten inbound markets), and an additional 370,000 Australians will visit the United States every year by 2018. Australians stay an average of 20 nights and visit about 2.1 states (no other market has multiple state visitation levels as high as Australia, the average is 1.5). The latest arrival statistics indicate that Australian travel to the United States remains robust and that Australia continues to be an important source of overseas visitors.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Austria

In general, Austrians prefer to spend their vacations abroad. They spent a record US\$ 12.9 billion traveling abroad in 2012, where approximately US\$ 492 million was spent for travel to the United States. On average in 2012, Austrians spent approximately USD 4,520 per trip, and spending increases in 2013 were estimated to be 4%.

The United States was the most popular long-haul destination in 2012 for Austrian travelers. The number of Austrian travelers to the United States is also estimated to have increased about 4% in 2013. For 2014 an increase of 3% is expected, but with the average visitor spending slightly less than in the past. Austria ranked 32 overall for arrivals to the United States in 2012, and travelers stayed for an average of 18 days. The top ports of entry for Austrian travelers in order are as follows: New York JFK, Washington D.C., Chicago, Miami, Los Angeles, Atlanta, Boston, San Francisco and Dallas.

The most popular U.S. destinations are New York, Florida (Orlando, Miami), California (San Francisco, Los Angeles, and San Diego), Nevada, Massachusetts, Illinois, Pennsylvania, New Jersey, Texas, and major national parks. The most popular activities for Austrians visiting the U.S. are amusement/theme parks, visiting historical places, sightseeing in cities, visiting museums and art galleries, visiting cultural heritage sites, shopping, dining in restaurants, water sports and golfing. Travel industry representatives see potential for adventure trips to Alaska, Washington State, Oregon, Colorado, Montana, Texas and Louisiana, especially with a growing desire for more outdoor activities among Austrians. California and Las Vegas remain strong attractions, though repeat travelers choose scenic destinations like New England, the Carolinas, Tennessee, Georgia and the Great Lakes.

With the euro to U.S. dollar rate being in their favor, Austrians will continue to choose the U.S. as their preferred overseas destination. Most Austrians, with the exception of older people, prefer to travel individually. The majority of Austrian travelers rent a car, so package deals with car rentals are always attractive. Austrians who travel to the United States are generally 20-50 years of age with about 50% belonging to the upper middle class. Vienna and its surroundings account for the major part of travel to the United States. The majority of Austrians choose to visit between June and September and during their Christmas holidays. Almost 50% of all leisure travel takes place during the months of July and August. About 78% of travelers to the United States are for pleasure, while about 18% for business including conference/convention, and the last 4% combine business and pleasure. Of those who visit the U.S., more than half are repeat visitors.

	<b>2012</b>	<b>2013 (Estimate)</b>	<b>2014 (Estimate)</b>	<b>2015 (Estimate)</b>
<b>Total Austrian Arrivals to the U.S. in thousands</b>	183,276	198,000	204,000	210,000

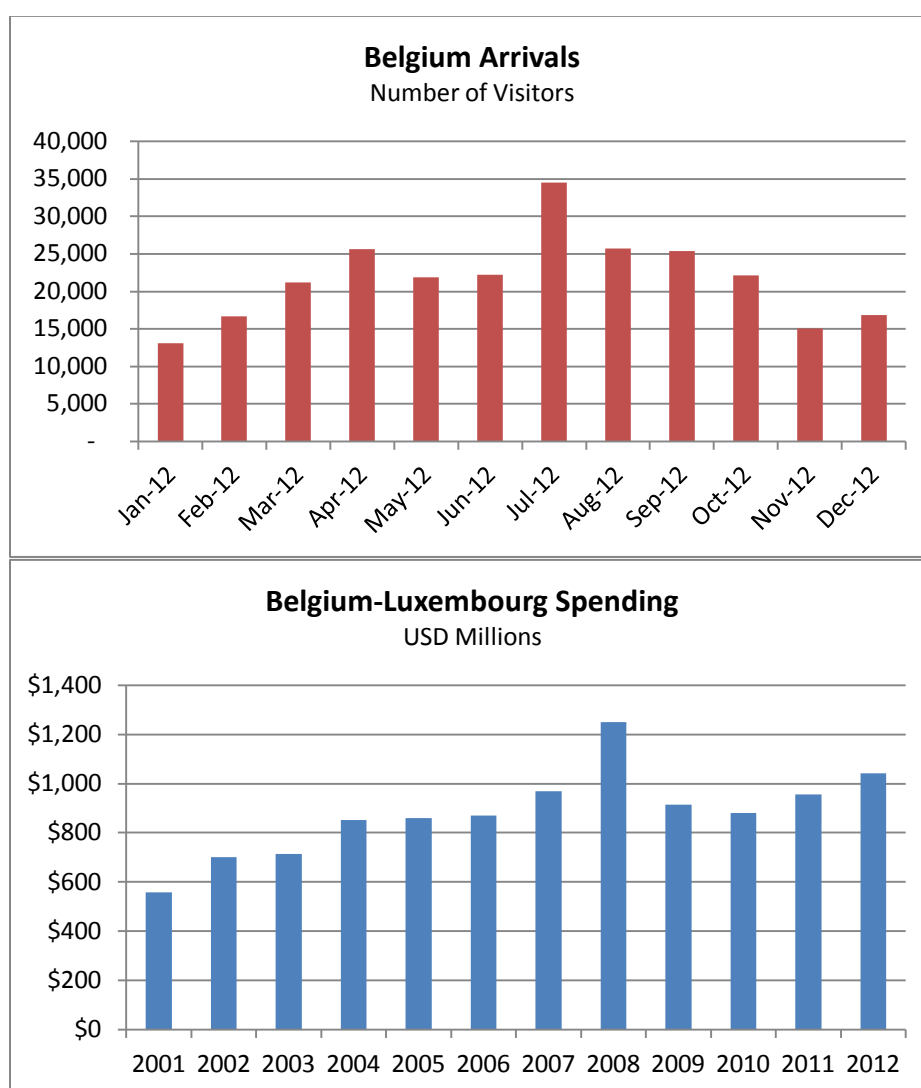
*\*Source: U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries; statistics for 2012*



## Belgium

The United States is the top long-haul destination for Belgian travelers. With 260,267 Belgians visiting the U.S. in 2012, Belgium is in 25th place for countries that travel to the U.S. the most. The outlook for 2014 remains optimistic but will depend on the ongoing economic uncertainties. The United States remains very attractive thanks to the strength of the euro against U.S. dollar.

Traditional destinations continue to attract the most Belgian visitors. The three most popular destinations are New York, California and Florida, though states like Nevada, Arizona, New Mexico and Utah are gradually attracting more and more Belgian visitors. Belgians generally have a high level of disposable income to spend on luxury items and leisure activities such as travel, but opportunities for package deals combining flights, hotels, car rentals, and vacation destinations are still very attractive to Belgian visitors, and are particularly popular with the middle-income population.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Brazil

Brazil has very recently surpassed Germany as the 3rd largest source of overseas visitors to the United States, and Brazil accounts for more than 30% of all arrivals in the United States from South America, the top arrivals market share from that continent. With both the fifth largest land mass and population in the world and due to recent economic growth, Brazilian middle-class travelers to the U.S. are expected to continue to significantly increase for years to come. According to local major travel publications, the U.S. is recognized as the #1 destination of choice for first-time Brazilian international travelers and the destination of choice for Brazilians that have yet to make their first trip abroad. Outlook for Brazilian travelers to the U.S. is very good. Brazilian arrivals to the U.S. increased 34% in 2010, reaching record of nearly 1.2 million visitors to the U.S., a 26% increase in 2011 with roughly 1.5 million visitors, and a 19% increase with a record 1.8 million arrivals to the U.S. in 2012. The U.S. Department of Commerce's Office of Travel and Tourism Industries – OTTI, reported 18% growth in the first few months of 2013 alone, and final totals for 2013 estimate over 2 million Brazilian visitors to the U.S.

Favorable appreciation of the Brazilian real to U.S. dollar has helped make the U.S. a top destination for Brazilians in recent years and has helped make shopping a top preference for 95% of visiting Brazilians. They also enjoy fine dining, visiting historical sites, amusement parks, sightseeing, and participating in cultural activities. The most popular destinations for Brazilian visitors in the U.S. are Florida (Miami and Orlando), New York City, Los Angeles, and Las Vegas. Washington, DC, New Orleans, Massachusetts, San Francisco and Texas are popular secondary destinations.

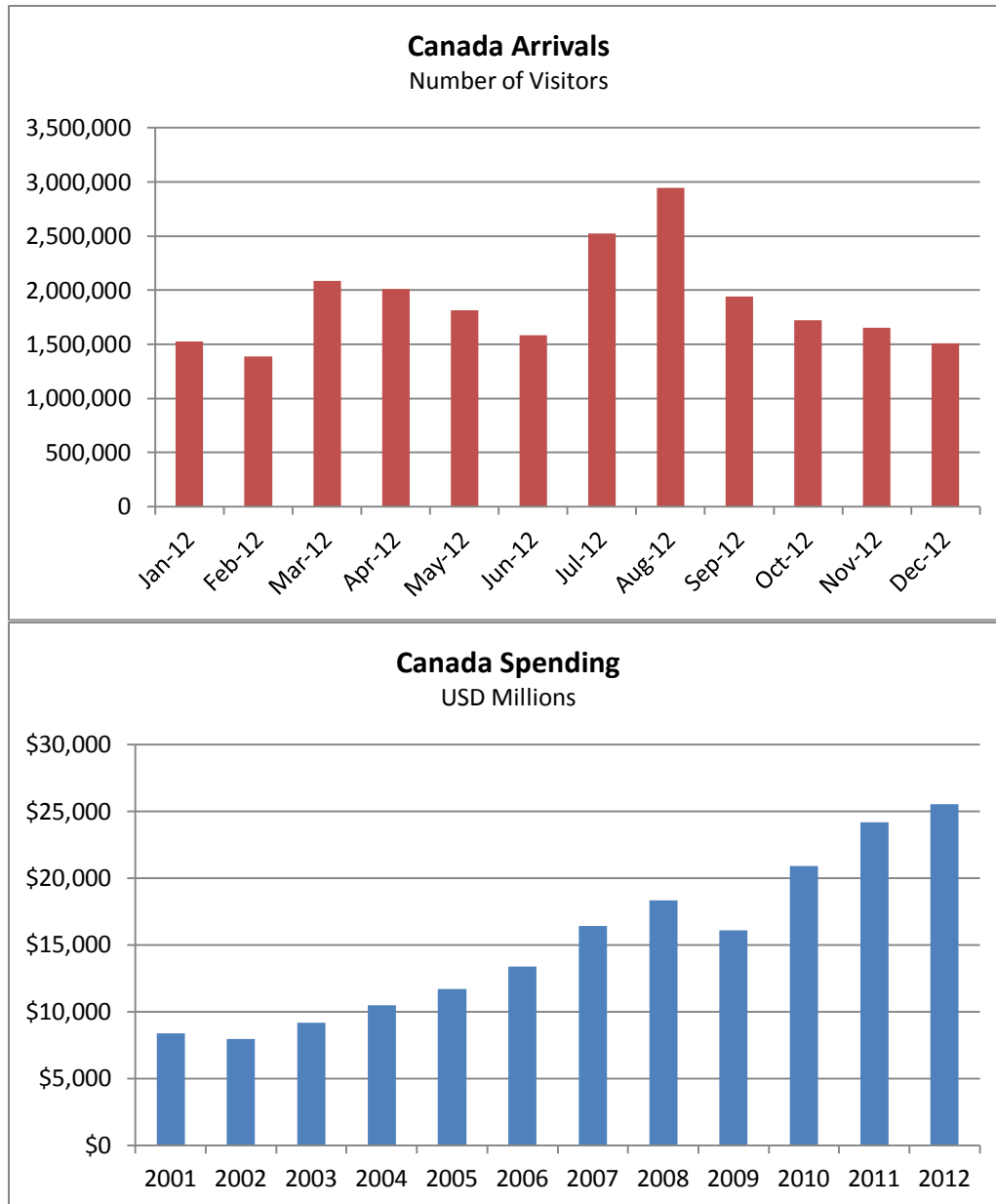
The high season for Brazilian travel to the U.S. is December through January, and July during school holidays. Shorter trips during public holidays are also very popular. Package deals and fly and drive trips are becoming increasingly attractive to Brazilian families wishing to drive through Arizona, California, Nevada, Colorado, Florida, Louisiana or New England. Business travelers to the U.S. have also been on the rise and a common trend seems to be extending stays up to 30 days. Brazilian visitors to the U.S. require a visa, but Brazil issues more than 1.1 million U.S. visas each year. Recently, the State Department added more consular officers at its visa issuing posts in Brazil to speed up the visa process for Brazilians wishing to visit the U.S.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Canada

Canada posted record visitation to the United States at 22.7 million visitors in 2012; up 6.4% from 2011. Therefore, Canada continued to deliver the largest inbound travel market to the United States in 2012 at 34% of 67 million international visitors. A 3% increase is projected for 2013, and total growth between 2013 and 2018 is expected to be 24%. Canada ranks first in spending at US\$ 26.1 billion, or 15.5% of total international spending (US\$ 168 billion), and first in balance of trade surplus at US\$ 18.5 billion in 2012.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

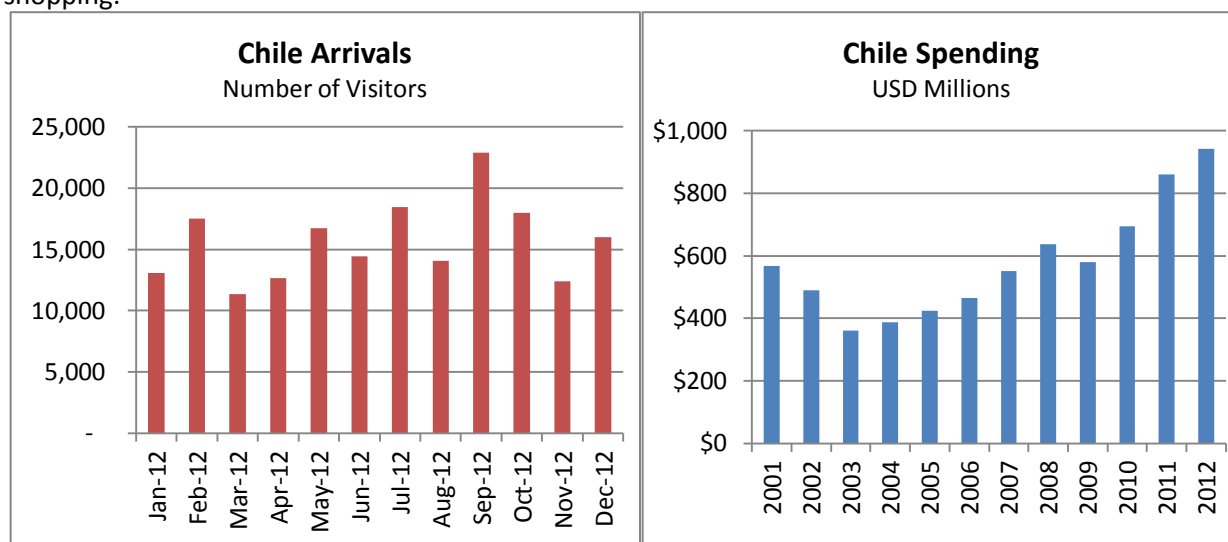
## Chile

Chile's outbound travelers in 2012 are estimated to be about 3.5 million with about 400,000 visitors to the United States, representing an increase of 12 percent compared to 2011. The percentage of Chilean travelers will continue to grow due to Chile's economic growth and political stability. The convenient exchange rate of dollars to pesos makes the United States an even more attractive destination, especially for first-time travelers that can now afford to travel abroad due to their growing economy. Also due to the Visa Waiver Program for Chile effective May 1, 2014, Chileans no longer need a visa to enter the U.S. Because of this, Chileans traveling to the U.S. are expected to double in the next 2 years.

About one third of total Chilean travel takes place during the months of January and February, followed by schools' spring break in September and winter break in mid-July. During summer months, Chileans prefer beach destinations, making Florida and the Caribbean islands top destinations.

Incentive travel is increasing gradually. Most arrangements for incentive and corporate travel is done by wholesalers and travel agencies that promote leisure travel or they are organized in-house by a company who is planning an incentive trip. Chile offers an excellent market potential for U.S. travel and tourism services. Most Chileans prefer to make all travel arrangements with travel agents prior to departure, including airline tickets, hotels, car rentals, and attractions, though travel arrangements made online are increasing rapidly, especially among young people.

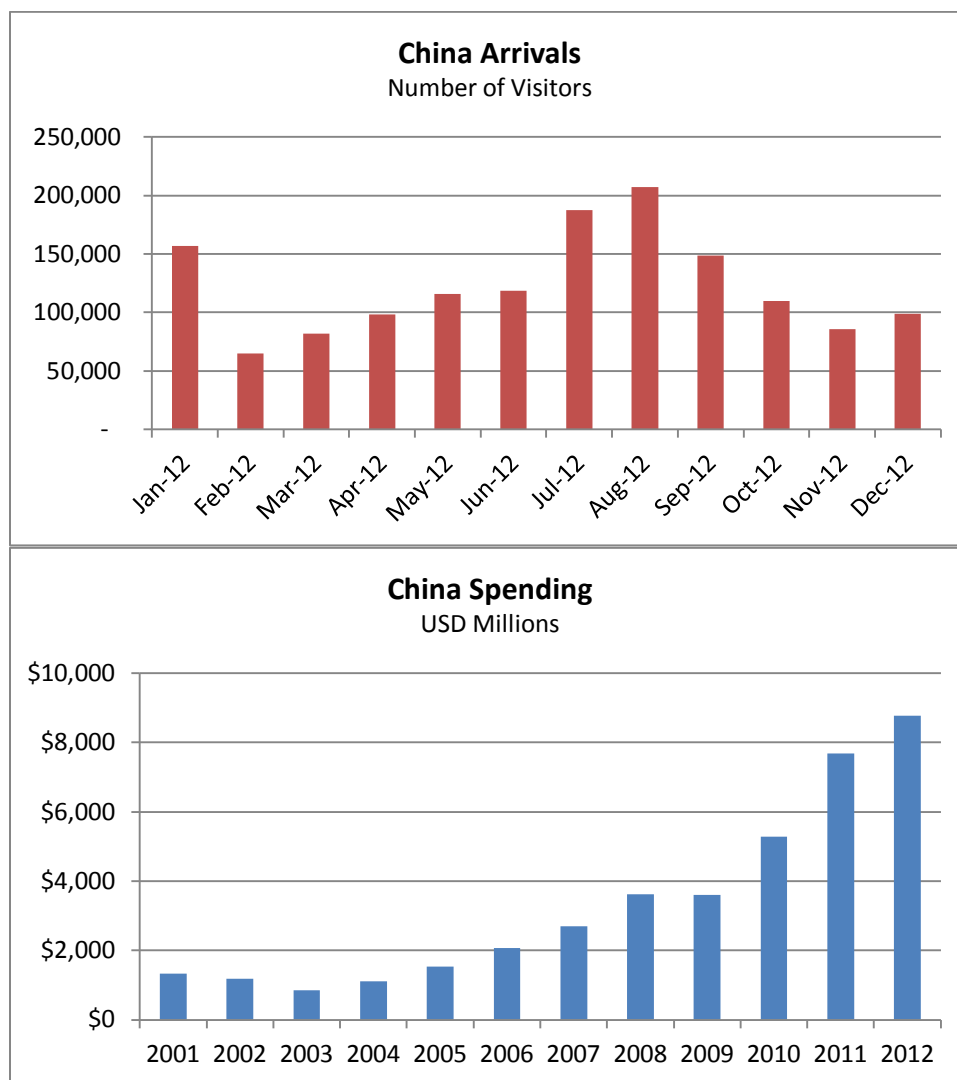
Chileans seeking leisure travel, including family attractions and amusement parks, beaches, and shopping malls and outlets provide some of the best market opportunities for the travel and tourism sector in the US. Studying English as a second-language has increased the attractiveness of the US as a destination as well, especially among high school and college students and young business people. Business travel has a continued growth since the United States is Chile's main trade partner. Chileans attend trade exhibitions and conferences in all industry sectors, especially in those sectors where Chile offers a good market. Chileans who are experienced travelers are interested in new destinations and attractions such as cultural events, art exhibitions, musical performances, sport tournaments, and great shopping.



*\*Source Data: National Travel and Tourism Office ITA/DOC*

# China

Chinese travel and tourism to the United States in 2012 totaled 1.47 million visitors, a 35% increase over the previous year and the fastest growth among the top 30 origin markets. China accounted for 1.7% of 2012 visitor volume in the U.S., moving it up the rankings past South Korea and France to seventh place in arrivals. The top three activities for Chinese tourists while in the U.S. are shopping, sightseeing and fine dining, while visits to small towns, national parks and amusement parks also rank highly. Chinese were the sixth biggest international spenders in the United States, racking up US\$ 8.8 billion in travel-related consumption in 2012 (\$6.5 billion in travel receipts and \$2.2 billion in passenger fair receipts), a 14% annual increase. Meanwhile, China's new Tourism Law that took effect October 1, 2013, prohibits travel agencies from luring tourists with unreasonably low prices, or garnering illegitimate gains such as rebates by arranging shopping or providing tourism services that require additional payment. The law applies to all destination markets worldwide, including destinations within China, and will likely result in higher prices for packaged tours overall.



\*Data Source: National Travel and Tourism Office ITA/DOC

## Costa Rica

The United States is by far the preferred destination for Costa Rican travelers. According to industry sources, the top three visited states are Florida (Miami, Orlando), California (Los Angeles), and New York (New York/New Jersey). It is not expected that in the near future the top destinations will change, primarily because the Costa Rican travelers have targeted those destinations due to different convenience factors such as relative proximity, airline routes, fewer language problems (more Spanish-speaking people), lower costs, and the availability of amusement parks.

While tourism growth to the U.S. from Costa Rica may be small due to the worldwide economic situation, tourism travel is expected to continue, not only to the destinations already mentioned but also to Texas (Dallas, Houston); Louisiana (New Orleans); Illinois (Chicago); and Nevada (Las Vegas).

Major reasons for choosing U.S. travel destinations include proximity to the U.S., many travel destination options, attractions for all ages, many options for shoppers, and the large and interesting trade conventions. The average expenditure per person, including accommodations, shopping, food, transportation, and others is in the range of \$2,000 - \$3,000. Current airlines serving U.S. destinations include Delta, AVIANCA, Frontier, Spirit, JetBlue, United, American Airlines, COPA (through Panama), and U.S. Airways.

Economic trends which might stimulate travel include: a) CAFTA-DR, which will stimulate business among United States and Costa Rica, b) airline and travel agency agreements promoting U.S. tourist destinations with more attractive and more varied travel packages, and c) the relatively high cost of vacation packages within Costa Rica, which stimulates locals to do their vacation travel outside of the country.

Costa Ricans always tend to be interested in a variety of inland destination packages and tourist services to explore their personal interests, including cultural activities, sports, education and business.

	2011	2012	2013 (estimated)	2014 (estimated)
Costa Rican Travelers to the United States	168,722	179,755	185,148	192,554

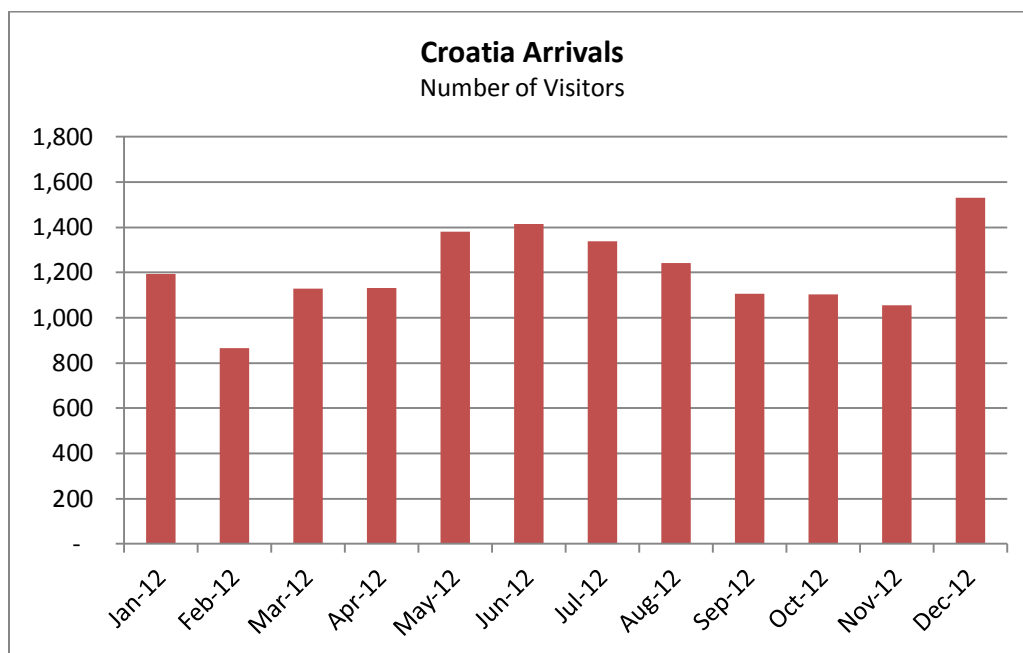
*\*Source: U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries; statistics for 2012*

## Croatia

Croatia is one of the most significant Mediterranean destinations and it has a long tourist tradition and great development potential. Tourism dominates the Croatian service sector and accounts for up to 20% of Croatian GDP. With over 10 million foreign tourists annually, tourism generates revenue of over US\$ 9 billion. Its positive effects are felt throughout the economy of Croatia in terms of increased business volume observed in retail business, processing industry orders and summer seasonal employment.

Almost 19,178 Croatians visited the United States in 2012, an increase of 3.3% in comparison with 2011, and spent an estimated \$12 million. Croatians spend an average of five to seven days in the United States.

	2008	2009	2010	2011	2012
Total Croatian tourists travelling to U.S.	17,270	15,407	15,105	15,241	19,178



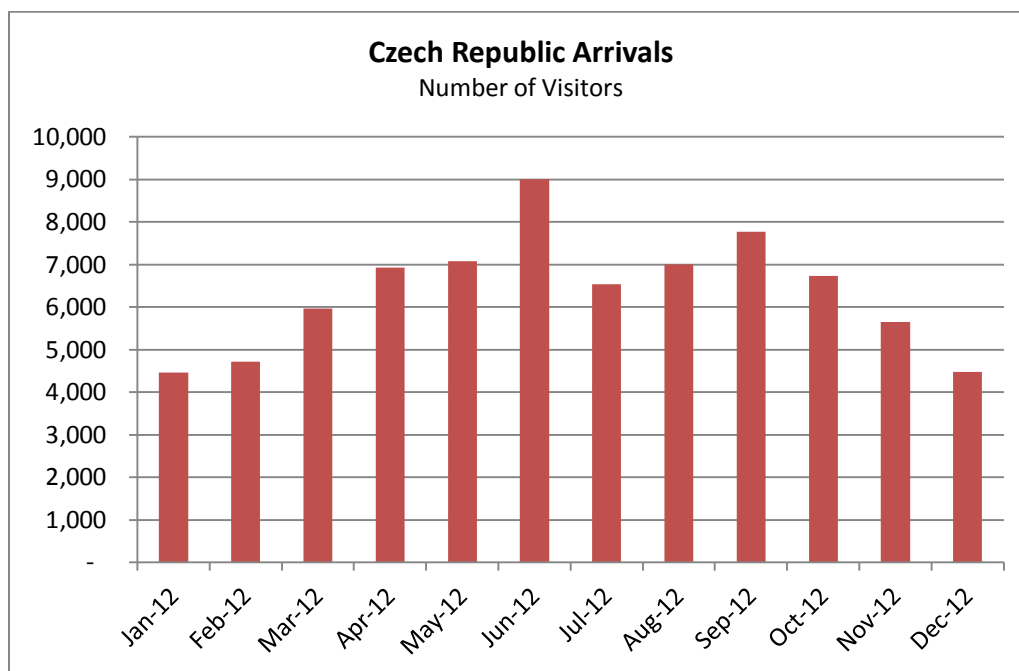
*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Czech Republic

For many years, Czech citizens were not allowed to travel to Western countries. This was especially true about the USA, the country "over the ocean", and symbol of democracy. Because of its relative inaccessibility during non-democratic times in the then Czechoslovakia, it became a dream travel destination for the majority of Czechs. Until November 2008 there was a visa duty for Czech visitors to the United States. Since November 17, 2008, Czechs now only need the registration in the ESTA, electronic system of travel authorization, when planning to go to the USA for business or tourist purposes, but only if they have a passport with biometrical data.

Over 76,000 Czechs visited the U.S. in 2011 and Czech tourists come as individuals, students, group tours arranged through travel agents, older people visiting relatives, or incentive groups. A typical Czech visitor comes as an individual interested in travelling and seeing the national heritage and landmarks of the U.S. (national parks and monuments). There is also a small but very active group of Czech tourists interested in Native American culture. This phenomenon is very similar among Germans as well, with the only difference being in the income level between Germans and Czechs.

Their average stay is 14-30 days, and typically their accommodation is primarily with relatives and friends. When they do make accommodations outside of friends and relatives, they prefer to medium-priced hotels. Czechs tend to prefer outdoor activities, especially beach activities (Florida is the highlight), but also national parks, theme parks, hiking and skiing.



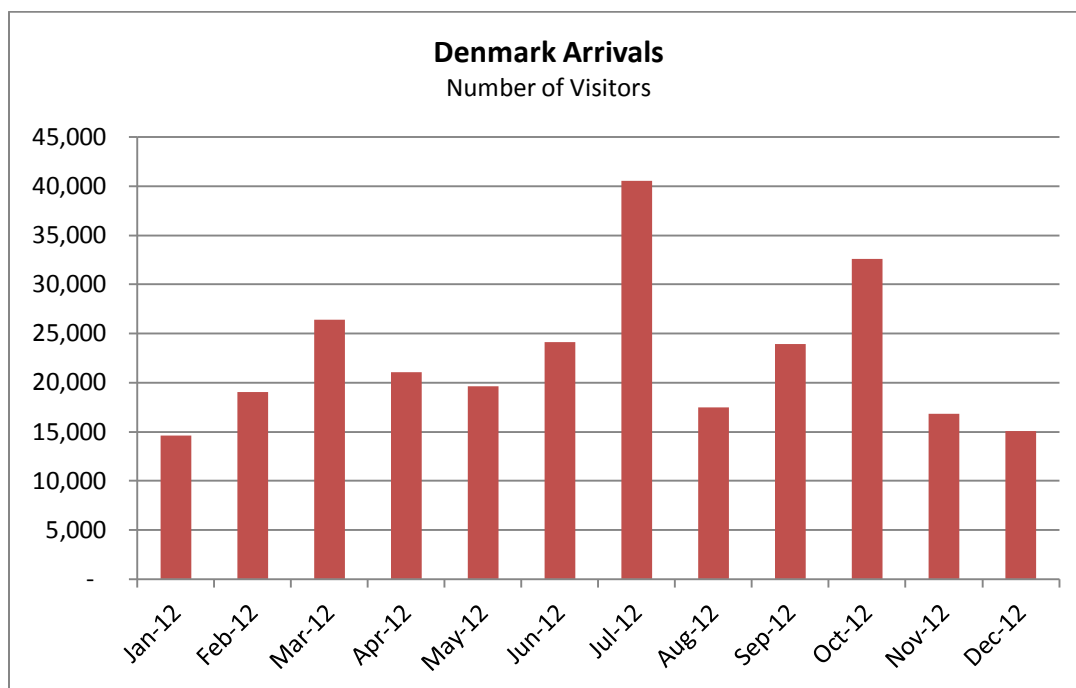
*\*Data Source: National Travel and Tourism Office ITA/DOC*



## Denmark

The United States is the favorite long-haul destination for Danish travelers and an increasing number of Danes travel to the U.S. every year. They stay longer (17.5 nights) and spend more per trip (US\$ 108 per day) than the average overseas visitor and make up a highly attractive segment for American suppliers.

2011 was another positive year for the Danish travel trade and many tour operators are looking for new and exciting products. 274,000 Danish visitors traveled to the United States in 2011, a 6% increase compared to another record-breaking year in 2010. Despite being a mature market, Denmark continues to show impressive growth rates, and with 5-6 weeks of annual paid vacation, tourism demand continues to be high.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

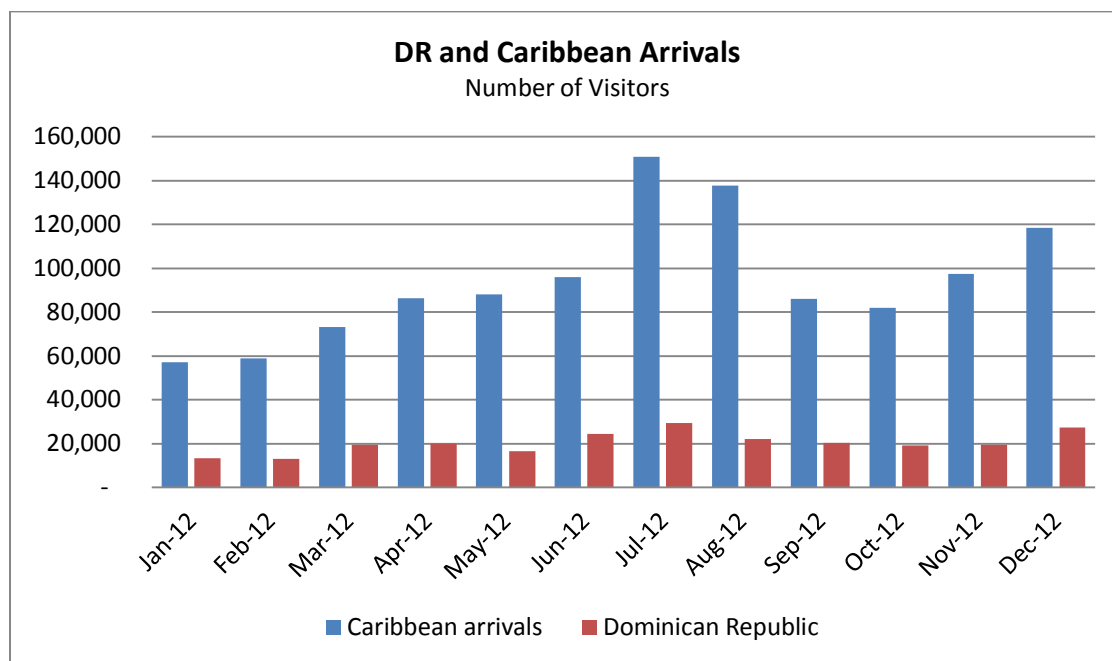
## Dominican Republic and the Caribbean

Travel to the United States from the Caribbean continues to be very active. According to a report on “International Visitation to the United States” prepared by the U.S. Department of Commerce, ITA, National Travel and Tourism Office, in 2011, nearly 1.1 million travelers from the Caribbean visited the United States. This figure includes about 230,000 travelers from the Dominican Republic (ranking 26th on the Top 50 markets for international visitors to the US – accounting for a 4% decrease over 2010), about 223,000 from The Bahamas (ranking 27th with 8% decrease over 2010), nearly 160,000 from Jamaica (ranking 38th with a 11% decrease when compared to 2010), and about 133,000 from Trinidad and Tobago (ranking 39th with a 3% decrease).

Though the last few years have shown decreases in numbers of arrivals, travelers from the Dominican Republic are expected to start steadily increasing 3 to 5% for the next 3 years. Dominicans are traveling to the United States mainly to visit friends/relatives, for leisure, and for business purposes.

The top traveled US locations include: Florida (Orlando/Miami), California (Los Angeles/San Francisco), New York (New York City), and New Jersey (Newark). These US cities correspond to the most inbound flights from the Dominican Republic. Las Vegas, Chicago, Los Angeles\*, San Francisco\*, New York, Orlando, Washington DC, and Dallas are also increasing in popularity among the Dominicans to travel for both leisure and business, in particular to visit trade shows.

\*Also for business travel en-route to Asia.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

## El Salvador

Due to the economic situation in El Salvador, Salvadorans are being cautious with their travel budgets to the United States. However, from January to November 2012, statistics reported a 1.5% increase in visitors to the U.S., compared to figures during the same period in 2011. A positive increase shows how the sector is slowly recovering in El Salvador, and tour operators expect an increase of 2% annually for the upcoming years.

El Salvador is ranked 47 among the top 50 countries in international visitors to the United States, according to the Office of Travel & Tourism Industries, U.S. Department of Commerce.

As of November 2012, Central America reported more than 703,000 visitors to the U.S., representing a change of 7.1% compared to the same period in 2011. Of this number, more than 88,000 were travelers from El Salvador. Historically, Salvadorans have often traveled to the U.S. to visit relatives and for leisure or business purposes. The main destinations are Florida, California, Texas, Virginia, Maryland, New York and Illinois.

American, United and Delta Airlines offer daily flights to gateway cities and connections to the United States. In 2012, United launched a direct flight from San Salvador to Washington D.C. Additionally, TACA Airlines, headquartered in El Salvador, is the major carrier in the market offering flights to nine different cities in the United States. Spirit, the low cost U.S. airline began operations in El Salvador in 2011, with two flights per week.

TACA Airlines was acquired by the Colombian company AVIANCA, and has operated under the code AVIANCA TACA since 2012; by June 2013 the airline will start operating under the name of AVIANCA offering new connections to U.S. destinations.

	2011	2012	2013 (forecast)	2014 (forecast)
<b>Salvadoran Travelers to the United States</b>	97,967	88,396*	90,163	91,967

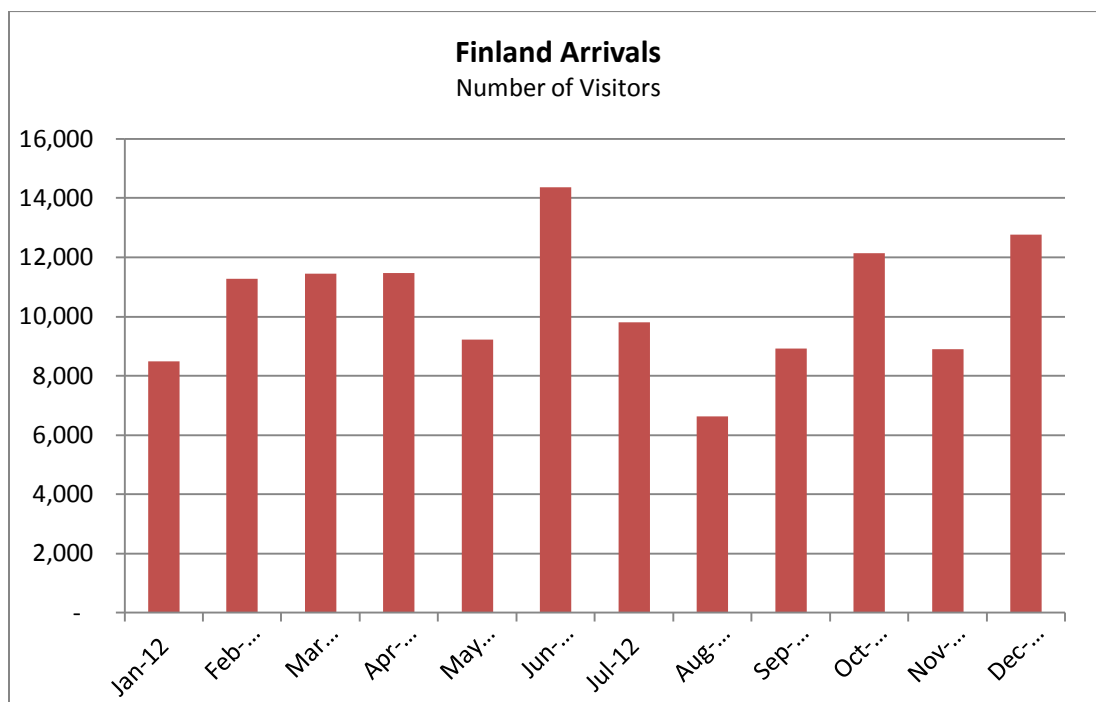
\*Source: U.S. Department of Commerce, ITA, Office of Travel & Tourism Industries; \*Statistics from January to November 2012

## Finland

The United States is one of the main long-haul destinations for Finns, with over 125,000 Finnish arrivals in 2012. Florida, New York, and California continue to be the best prospects for the U.S. travel industry. First time travelers, families with children, and senior citizens favor Florida, whereas younger people and experienced travelers favor the West Coast. New York City, Chicago, Boston, Los Angeles, Las Vegas, and Atlanta are the most important destinations for Finnish business people. The popularity of the United States as a travel destination is based on the large variety of activities it offers. It is easy to combine various attractions - beach holidays, city tours, theme parks, culture, shopping, nature, etc. Also, Finns find it easy to adapt to American culture, given its popularity in Finland.

Although Finns generally favor “sun and sand” in addition to city destinations, a growing number of travelers are looking for new activities to do on their vacations. The trend is that more travelers are looking for individual travel packages and are interested in various activities such as local culture, nature, or sports, and Finns have shown interest in other destinations such as Alaska, Arizona, Hawaii, Nevada, and New Mexico. As a travel destination, the United States competes mainly with Southeast Asia. Countries such as Thailand, Brazil, India, and China have gained popularity due to competitive package tours organized for these destinations.

There are no restrictions on Finnish foreign travel. Since October 1, 1991, Finland has been included in the visa waiver program for visits up to 90 days in length. This has made it considerably easier for Finns to travel to the United States. Also, the overwhelming majority of Finnish passports have been machine-readable since 1987, and biometric passports were introduced in August 2006.

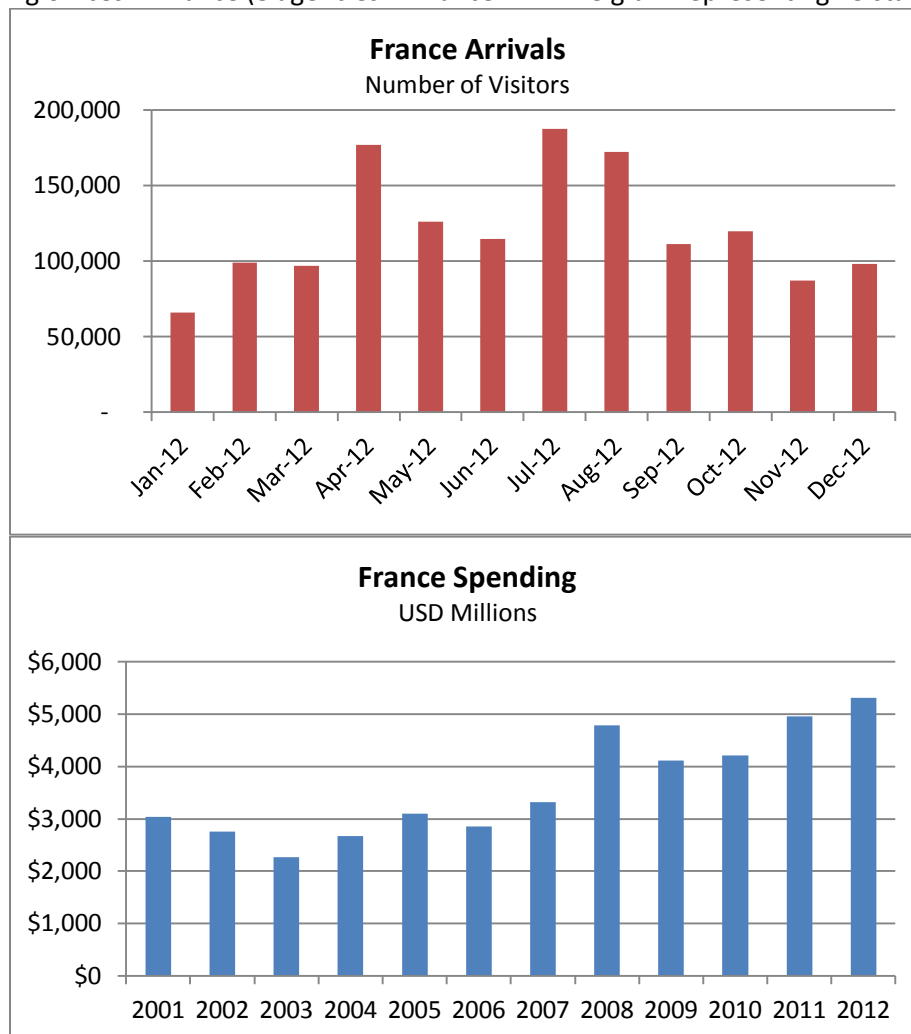


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## France

The French market is a very dynamic market. French travel to the U.S. ranks 3rd in Europe after the U.K. and Germany, and 7th worldwide. In 2011, about 1.5 million French visited the U.S., an increase of 12% (Germany: +6%, U.K.: 0%). The French have 5-7 weeks of vacation per year, making them avid tourists, with their average length of stay in the U.S. being 2 weeks. Though there is no significant French community in the U.S., the French are repetitive travelers, making them very likely to return specifically for tourism in the U.S. The French are independent in their travel behavior with 70% choosing fly and drive packages. The U.S. dollar to euro exchange rate has helped make U.S. an inexpensive and attractive destination for French travelers, especially with reasonable airfares and 9 carriers offering direct flights to the U.S.

The Visit USA Committee France and U.S. Commercial Service at the U.S. Embassy are working closely to promote events in the French market to increase potential travel to the U.S. (trade shows, receptions, briefings). More and more destinations are realizing the importance of the French travel and tourism and are opening offices in France (8 agencies in France + 1 in Belgium representing 23 states & 9 cities).



*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Germany

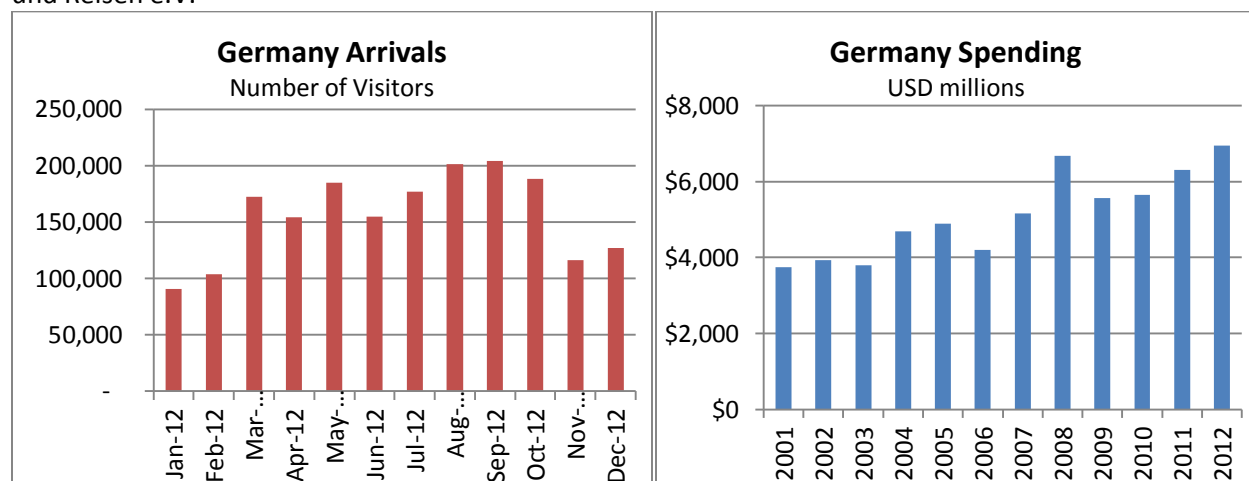
German travel abroad, including to the United States, is expected to show modest growth. Germans are high-spending travelers, and the United States is their most popular long-haul destination. Germans tend to stay longer than most travelers to the United States, and a wide array of non-stop direct flights to the United States continues to facilitate this travel.

German travel to the United States increased by 2.9% in 2012, with 1,876,000 Germans visiting the United States last year. It is forecasted to increase by 4% in both 2013 and 2014 and is expected to grow by an overall 12% from 2012 to 2018, according to the Office of Travel and Tourism Industries (OTTI). The latest statistics from March 26, 2014, show that over 1,785,000 Germans traveled to the United States from January to November, an increase of 2.1% over the same period in 2012, though not the full 4% that was predicted.

Germany's travel and tourism spending in the United States went up to an all-time record of US\$ 7 billion in 2012, an increase of 10%. Germany maintained its 7th place in spending rankings in 2012, behind Canada, Japan, UK, Mexico, Brazil and China. Travel and tourism exports account for 28% of all U.S. services exports to Germany. Germany now ranks number three in travel expenditure worldwide, behind China and the United States, according to Reisestudie 2013, a survey conducted by Commerzbank Research.

Germany ranks fourth in arrivals to the United States from overseas, following the UK, Japan, and Brazil. While domestic tourism has become a trend in Germany, the United States continues to be the favorite long-haul destination. The most popular U.S. states for German travelers are New York (33%), California (23%) and Florida (19%), with New York being the most popular city. Other top city destinations are Los Angeles, San Francisco, Las Vegas and Miami. German travelers are also the top overseas visitors in several western states. The average length of stay for German tourists in the United States, 19.6 nights, is considerably longer than for other overseas visitors.

Germans view 2014 optimistically, with 30% expecting to spend more money on travel than the year before. In 2014, 52% of potential German travelers (aged 14-70) have already thought about their travel plans for the year, as indicated in the ReiseAnalyse poll conducted by Forschungsgemeinschaft Urlaub und Reisen e.V.



\*Data Source: National Travel and Tourism Office ITA/DOC

## Greece

Despite the current economic crisis in Greece, the visa waiver act in April 2010 aided by the favorable euro to dollar exchange rate created an increase in visitors by making travel to the U.S. affordable and easier for many Greek travelers. Though there was no marked increase in arrivals between 2012 and 2013 according to U.S. statistics, travel has remained steady showing promising economic recovery.

Over 2 million Greeks travel abroad annually, spending around one billion dollars on their travel. Greeks travel abroad primarily for leisure and holidays, business, education, shopping and incentive tours, and are generally considered “high spenders.” While the average Greek traveler chooses European destinations such as Italy and the U.K. for leisure and vacations and Germany for business conferences, the U.S. remains one of the top long haul destinations for Greeks. Approximately 60% of Greek arrivals in the U.S. are independent visits for business or to visit friends and family, with the remaining being package trips. More than 2 million Greek-Americans live in the U.S. and approximately 5,000 Greek students study at American universities and colleges. The average Greek traveler stays for 10 days in either hotels or with family. The most popular destinations in the U.S. are New York, Chicago, Boston, Los Angeles, and Las Vegas. Other U.S. destinations that have become very popular, especially for honeymoon trips, are U.S. possessions in the Caribbean. The most popular attractions for Greek travelers are cities and towns, theme parks, museums, and casinos, while shopping and visiting expensive restaurants are high priorities as well.

The outbound Greek travel market has increased substantially during the last 15 years, and in particular the last five years, with the arrival of low-cost carriers in Greece, the addition of international routes by local carriers, and the visa waiver program. Many European Airlines, such as British Airways, Lufthansa, Air France, Turkish Airlines and KLM, offer very attractive ticket prices to U.S. destinations through European capitals (London, Frankfurt, Paris, Istanbul and Amsterdam). Although there are no year-round direct connections between Greece and the U.S., Delta Airlines and U.S. Air will be resuming seasonal direct flights to Athens from New York and Philadelphia. Greek travel sources indicate that depending on the prospects of the Greek economy, travel to the U.S. has the potential for further growth as travelers from all parts of Greece, including the islands, benefit from the visa waiver.

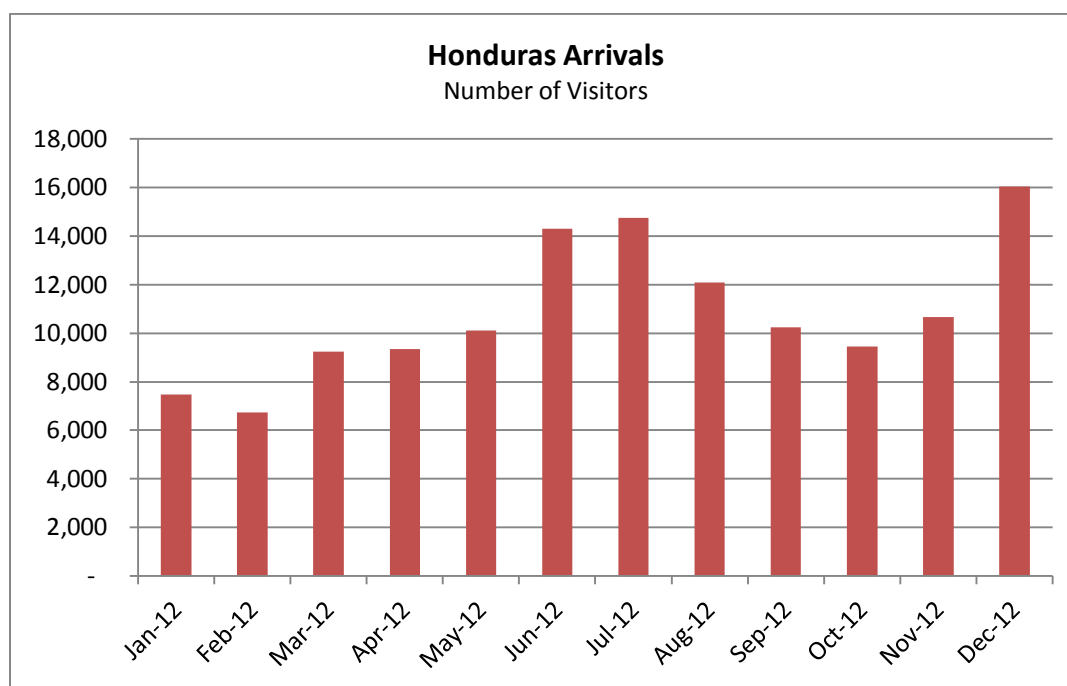


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Honduras

International travel is the single largest services sector export for the United States, accounting for 25% of all services exported (\$134 billion) and supporting 1.2 million jobs in 2010. Honduras is among the top 50 countries generating travel to the United States, and 16% of arrivals from Central America are Honduran. Despite strict visa requirements, the close proximity of the United States (only a 2.5 hour flight to the U.S. main gateway cities), coupled with the high receptivity for U.S. products and services, make the U.S. a preferred destination for Honduran travelers, followed by South America and the Caribbean. With a population of 8.2 million, the country's economic growth in recent years has the potential to prompt more middle-class travelers to the U.S. In 2011, arrivals from Honduras totaled 119,671, a 3.5% increase over 2010.

After a highly challenging year resulting from a political and economic crisis in 2009, industry contacts foresee a recovery with upside opportunities involving leisure and business travelers between 2010 and 2013. U.S. Department of Commerce (USDOC) 2010 statistics show that 45% of total inbound trips from Central Americans are connected to leisure, recreation and vacation/holiday-related activities, followed by visits to friends and relatives (36%), business/professional (33%), and convention/conference attendance (10%). The most popular destinations for Honduran visitors in the U.S. are Miami, New York, Orlando, Los Angeles, and Las Vegas. Washington, DC, New Orleans, Chicago, Houston, and Atlanta are popular secondary destinations. Florida is the preferred choice for leisure travel, with 55.7% of market share.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

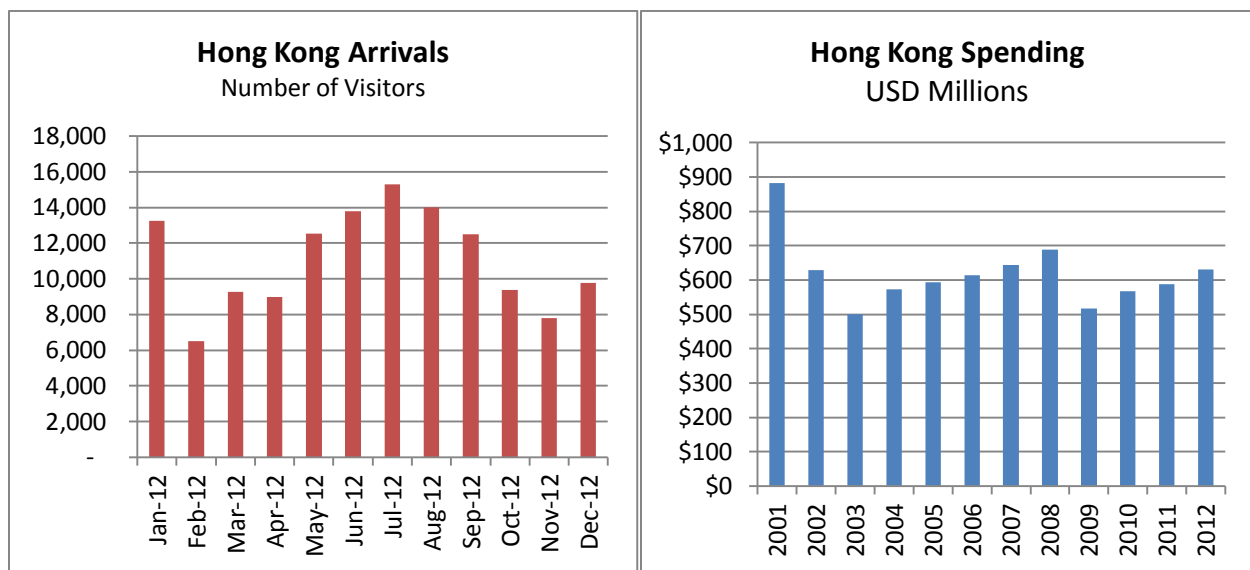


## Hong Kong

Hong Kong has a significant outbound tourist market supported by five main factors: (1) Hong Kong is the world's fourth most densely populated city with a population of 7.15 million and Hong Kong people often choose to spend their holidays overseas because of a lack of local recreational options; (2) Hong Kong citizens have relatively high average incomes; (3) Hong Kong's geographical location allows for easy access for people to travel abroad (Hong Kong International Airport is one of the world's busiest airport with 56.5 million passengers in 2012 alone and is connected to about 180 destinations); (4) Most Hong Kong citizens hold the Special Administration Region (SAR) passport which does not require visas to access over 140 countries; (5) the Hong Kong Government does not control travel of its citizens or foreign exchange to leave the Territory.

Due to these factors, Hong Kong residents are traveling abroad for business and pleasure, and have become more affluent over the past two decades. Although the economy has experienced some tough times, it has rebounded to a strong per capita GDP of US\$ 41,421 for 2014 estimates. Traveling abroad is no longer considered a luxury activity, but a habit taken for granted by the younger generation.

Hong Kong residents have developed into sophisticated travelers. The market for vacation travel packages has flourished and is competitive, targeting parents with children and the elderly, for whom budget is a major concern. However, more and more people choose to purchase air and hotel packages and choose to make travel arrangements by themselves. Travelers aged 30-45 tend to be the Free Individual Traveler (FIT). These travelers take a more leisurely pace in their travel and stay longer at each destination. Hong Kong travel agents are realizing this growing trend and have launched price competitive packages that only cover air tickets and hotels, and provide consultation on new destinations. With more direct flights launching in the summer of 2014 connecting between Hong Kong and the USA, there are ample opportunities for Hong Kong travelers to explore off-the-beaten-path destinations.

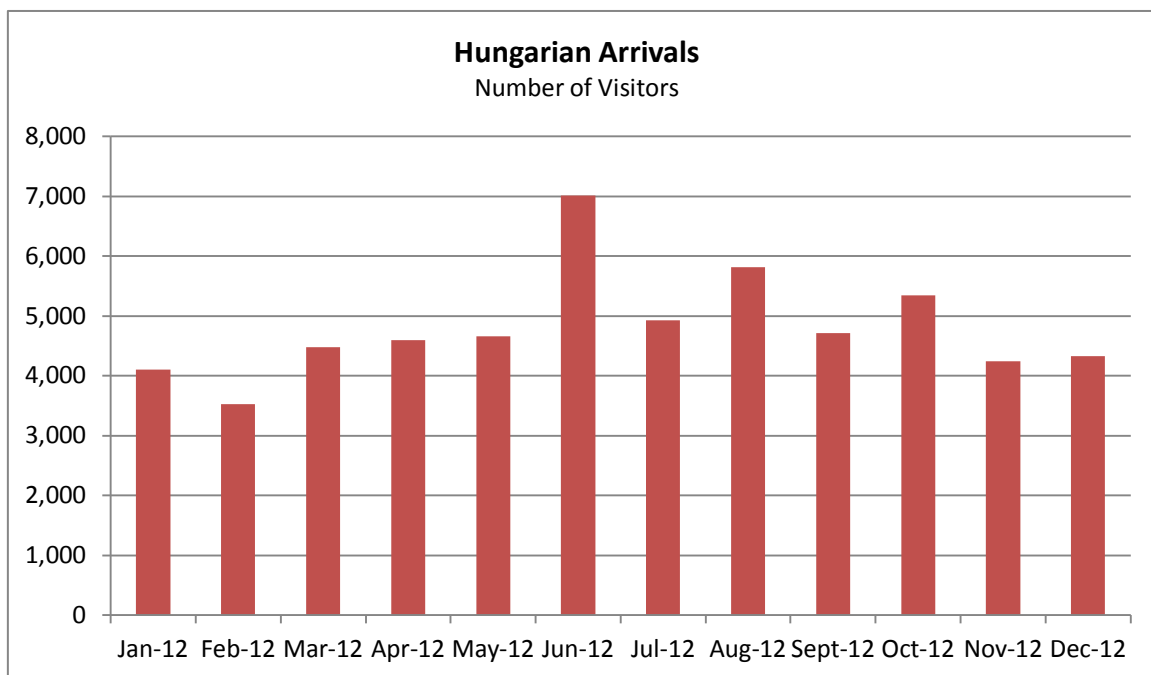


*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Hungary

For Hungarian travellers, the United States is one of the primary overseas destinations. The main U.S. destinations for Hungarian travellers are major cities (New York, Chicago, San Francisco, etc.) and well-known national parks in the States. There is also a sizable number of Hungarians travelling to the United States for business purposes. In 2011 about 58,000 Hungarians (0.06% of the whole population) traveled to the United States, which created a 13% increase compared to 2010. The graph below shows the same ratio in 2012 on the basis of data provided by the U.S. Department of Commerce.

The total number of Hungarian residents traveling to the U.S. in 2012 was just under 58,000, which compared to 2011, was approximately a 1% decline. There are several reasons behind this. First, since 2010 Hungary has been member of the Visa Wavier Program, therefore Hungarians can travel using the ESTA system without obtaining a visa, which accounted for the growth in 2011. Second, since February 2012, there has been no direct flight between Hungary and the U.S., which may also account for the decrease in the volume of travel from Hungary to the States in 2012, meanwhile the Budapest Airport is already working on regaining direct U.S. bound flights. Lastly, the Hungarian society in general prefers affordable destinations, and many closer tourist destinations due to this. There has been a considerable progress in making travel more affordable for Hungarians, however there is still a lot to be done. As a result of the lack of vacation time, most Hungarians also prefer travelling only for 3-5 days, which tends to be too short for an overseas destination.

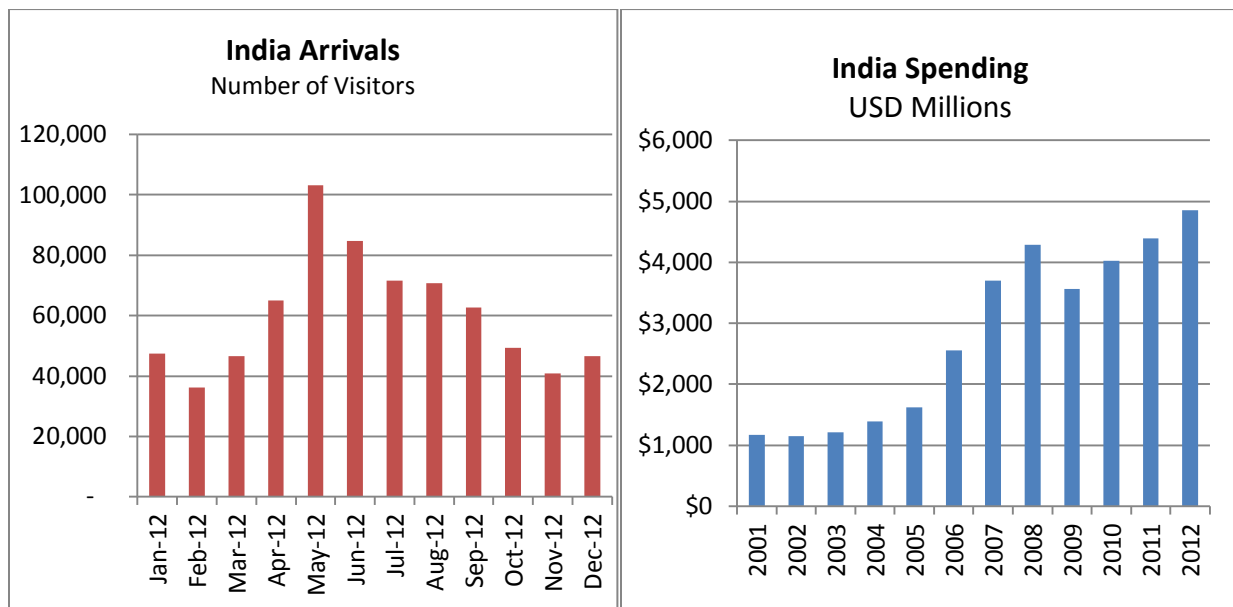


*\*Data Source: National Travel and Tourism Office ITA/DOC*

# India

The World Tourism Organization has estimated that India will account for 50 million outbound tourists who will spend around US\$ 28 billion on their travel by 2020. The United States is fast becoming a top destination for Indian travelers. While in 2011, the United States welcomed over 660,000 visitors from India, in 2012, over 720,000 Indians visited the United States which is an all-time record. India is now poised to leap into the top 10 of countries sending travelers to the United States and cross the 1 million visitor mark by 2015. The United States is ahead of its rivals with a share of more than 30% of Indian outbound tourists spending with a share of nearly five times more than its closest rival, Australia. Singapore, Malaysia and United Kingdom are holding the third, fourth and fifth spots respectively. Indians spend nearly US\$ 4.6 billion in the United States with shopping being their top activity.

Indians are among the highest spenders in key destinations around the world. According to a recently released Amadeus-Frost & Sullivan tourism industry report, Indians travelling to Asia-Pacific alone spent US\$ 13.3 billion in 2011. This figure is set to zoom to US\$ 91 billion by 2030, making Indians the second-biggest spenders, after China, in the world on overseas travel. Recognizing the tremendous potential in outbound travel from India, over 30 National Tourism Organizations (NTOs) from around the world have set up local offices in India. It is not surprising that even destinations like Tobago and Ethiopia have stepped up their efforts to push Indian outbound numbers to their respective countries. One of the key factors why NTOs are set on gaining business from India is that the Indian economy continues to fare well and has further potential for rapid growth and a strong economy. In addition, India has a middle class of 300 million including 1.6 million families having more than US\$ 100,000 annual income per annum.

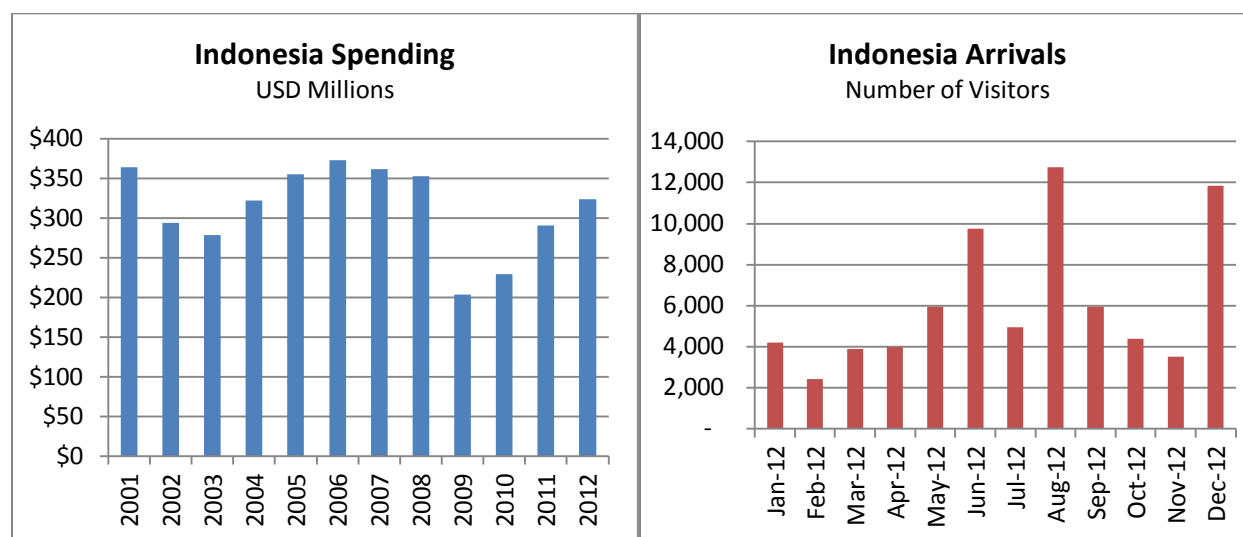


\*Data Source: National Travel and Tourism Office ITA/DOC

# Indonesia

While the number of travelers from Indonesia to the United States is still modest, there is great potential for more inbound travel to the U.S. from this nation of 247 million. In 2012, almost 74,000 Indonesians travelled to the United States, an increase of 11.4% compared to 2011. Indonesia has experienced strong economic growth over the last decade and the middle class is growing steadily. The U.S. Embassy in Jakarta has launched several initiatives to promote travel to the United States, including providing visa application training to travel agents and tour operators, streamlining the interview process for large tour groups, and introducing a new visa interview waiver program for qualified applicants. In 2012, the first-ever Visit USA Committee in Indonesia was formed, and the Association of Indonesia Tour and Travel Agencies (ASITA) signed an MOU with the Receptive Services Association of America (RSAA) to collaborate on marketing and education.

Popular destinations for Indonesians include Las Vegas, Los Angeles, New York and San Francisco. Alaskan cruises are also becoming more popular. Shopping is the top attraction for Indonesian tourists, so tour packages often include trips to outlet malls and designer stores. There are an increasing number of Indonesian students studying in various parts of the United States, and it is common for family members to visit these students. More corporate groups are also choosing the United States for their incentive travel; in 2013, an Indonesian company sent nearly 1000 employees to the United States as part of its corporate incentive travel program. The majority of Indonesians book their travel to the United States via local travel agents and tour operators. In general, Indonesians want to travel to the United States but find the distance and cost daunting. Peak travel times correspond with school holidays, which take place during the summer months and over the Christmas/New Year holidays. Local travel agents say that flights are often sold out during peak travel periods, so an increase in flight options would further increase travel. Direct flights to the United States are expected to resume in the next few years, which would likely lead to a significant increase in the number of Indonesian travelers to the United States.



\*Data Source: National Travel and Tourism Office ITA/DOC

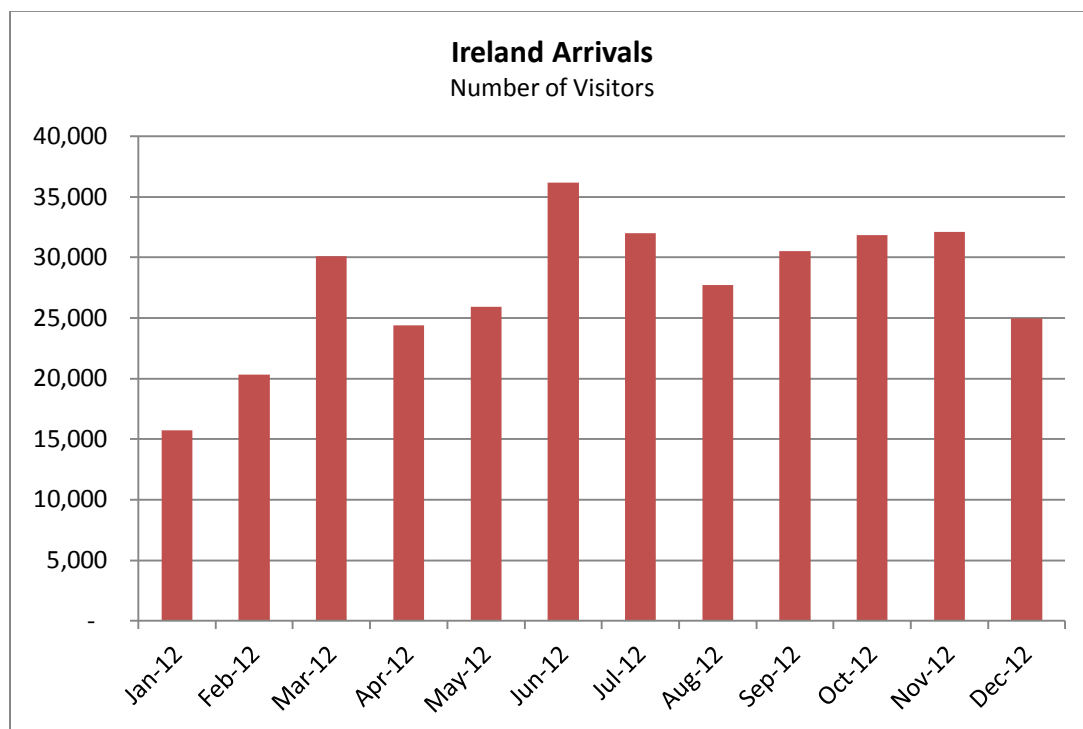
## Ireland

Ireland is ranked in the table of top 20 worldwide travel and tourism markets to the U.S. and is among the top 10 markets in Europe. With a population of 4.6m, Ireland generates more visitors to the U.S. per capita than most countries worldwide. The market has returned to growth figures recording an 8.6% increase in the first quarter of 2013.

The average length of stay for Irish tourists is 16 nights with leisure trips representing 60% of all travel. The friends and family market maintains 20% of market share and business and convention trips represent 10%. Top states visited are New York, California and Florida. Top cities visited include New York City, Orlando and San Francisco. Industry sources cite Texas, the Deep South and Kansas/Oklahoma as destinations of growing interest.

The Irish traveler is increasingly discerning and conducts more research on-line but bookings through tour operators continue to be strong. Flexible twin, multi-destination and all inclusive vacations are proving popular. U.S. pre-immigration and customs clearance facilities provide a unique advantage for Irish residents and passenger traffic from Europe connecting through Dublin and Shannon airports make travel even easier.

With an increase in airline capacity of 25% in 2013 and an expected further increase of 20% in 2014, the market is set to grow substantially over the next few years generating exciting marketing opportunities for destination companies, attractions and suppliers. The additional capacity which is being fueled by an increase in frequency of services, larger aircraft and a new direct service from Dublin to San Francisco demonstrates the industry's confidence in the future growth of the market.



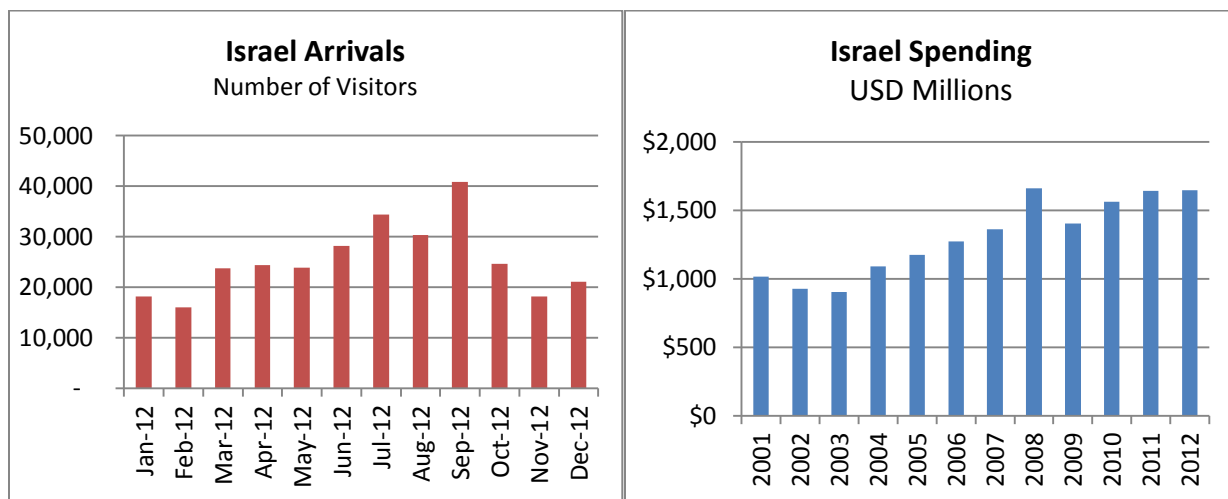
*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Israel

The United States is Israel's largest single country trade partner and the most preferred travel destination for business and for leisure. A visa is required for Israelis traveling to the United States for tourism and for business. Nevertheless, in 2013, there were over 300,000 entries by Israelis to the United States. Israelis travel to the United States to meet family and friends, to meet business partners, and for recreation. The most popular activities by Israeli travelers are shopping and dining. Specialty accommodations and bed & breakfast in exotic sceneries are also attractive to the Israeli consumer. Wine tours that include specialized culinary experiences, topped by outlet shopping would make a highlight of any trip.

At least 65% of Israeli travelers to the United States plan their trip weeks in advance. At least 50% of travelers use a travel agency as a primary source of information for trip planning. The average length of stay is 12 days, with an average expense per person per day totaling US\$ 200 including accommodations, meals and shopping (not including airfare). Industry experts report over US\$ 1 billion in expenditure per year by Israelis within the U.S. on travel-related services, not including airfare. U.S. travel destinations and suppliers may find market opportunities in Israel, especially by offering new travel products and a high level of service.

There are currently over ten daily, direct flights from Tel Aviv to the U.S. (to NYC, Newark, Philadelphia and Los Angeles). Most European airlines offer competitive prices and routes to the U.S. via Europe. Over 500 travel agents and about 20 wholesale tour operators work in the Israeli outbound travel market. Tour operators specialize in market segments rather than in specific destinations, and most operators are conservative in selecting new travel products.

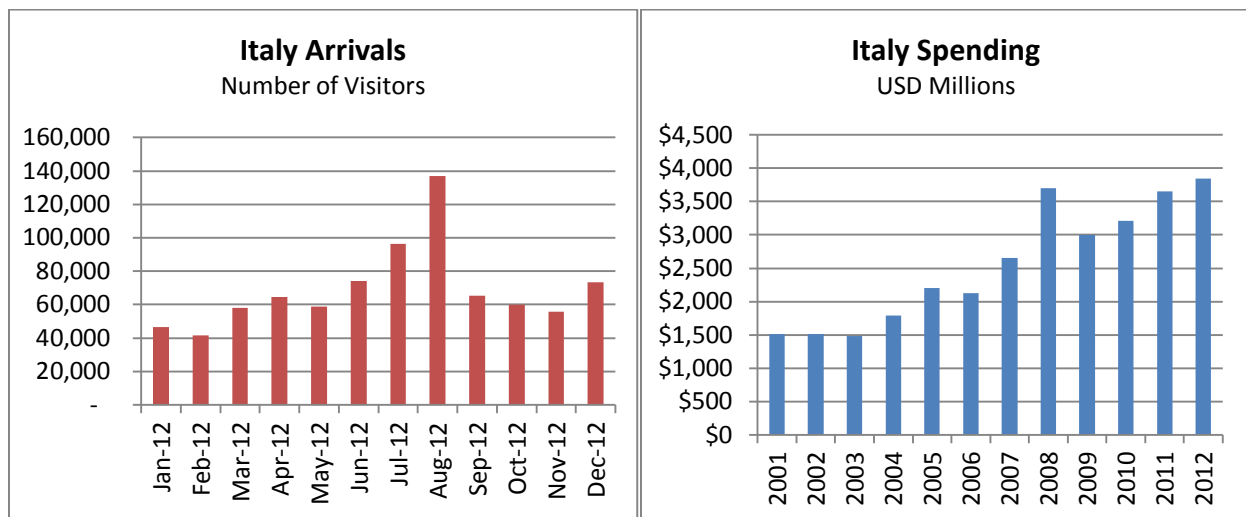


*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Italy

The number of Italians travelling to the United States in 2012 dipped 7% to 831,000, but total spending reached an all-time high of US\$ 3.85 billion. Despite lingering economic difficulties, Italy remains the 4<sup>th</sup> largest European market for US travel industry. Italians continue to go on vacation and they generally treasure spending at least one or two weeks either at the seaside, in the mountains or visiting foreign countries. So called “last minute” trips are becoming more popular again, despite all the efforts of the Italian tour operators to encourage advance bookings.

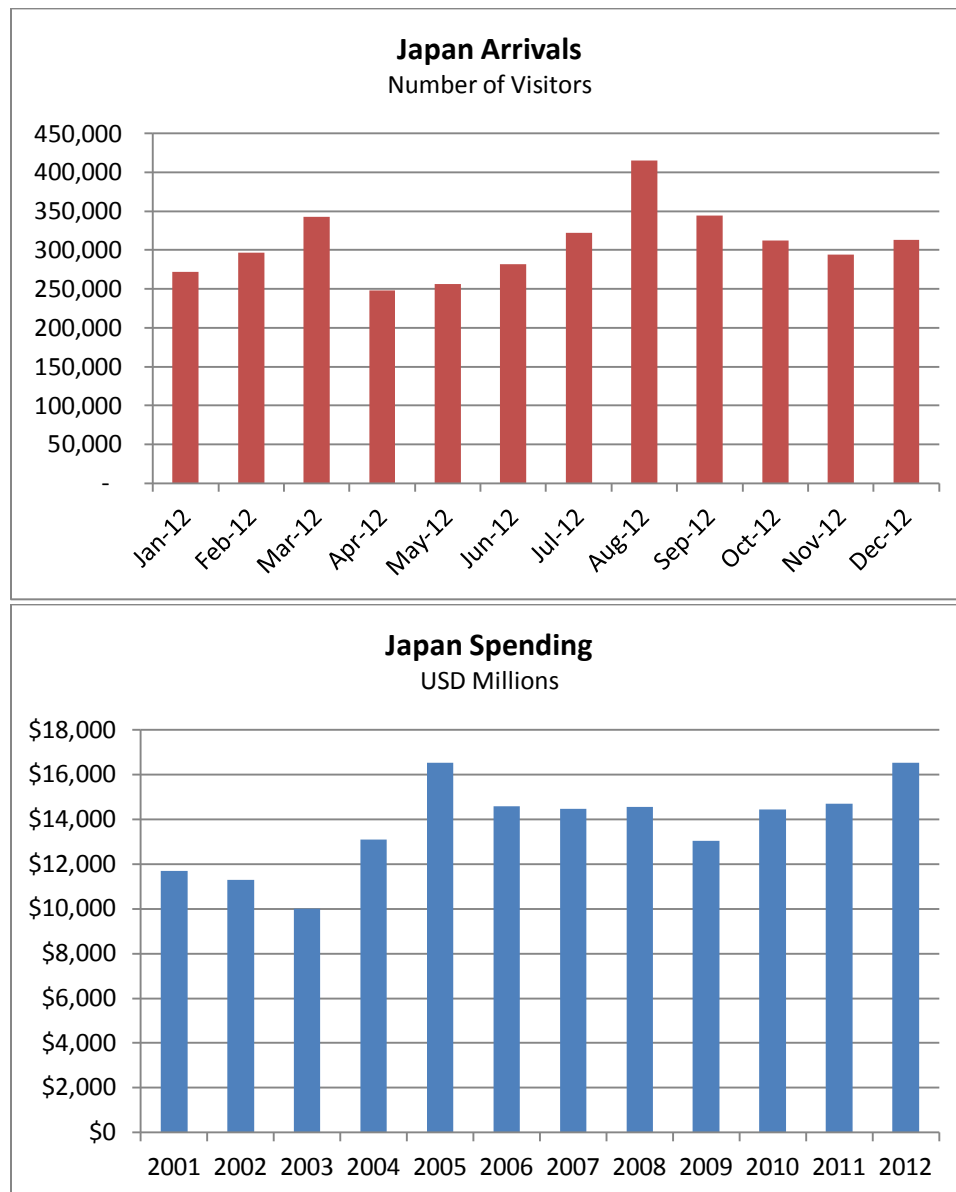
The United States continued to be the preferred long-haul destination for Italian tourists in 2012. China, Brazil and Australia also attract a large number of Italians, but the United States continues to have a large edge in overnights when compared to other non-European destinations. Data from Banca d'Italia shows that, in 2012 the USA ranked first in the number of Italians traveling to a long-haul destination, with about 19 million overnight stays. The most visited destinations continue to be NYC, Miami, Los Angeles and the West Coast in general. The preferred activity is shopping, but Italian tourists also enjoy cultural and historical attractions, as well as visiting national parks and monuments. Escorted tours and honeymoon travels increased as compared to the fly & drive tour which are more common in the summer season. City breaks tours are also very much in demand, with NYC in the lead, followed by Boston and Philadelphia. Other common although less visited destinations are the Rocky Mountains, New England, Travel South regions, Hawaii and the islands (U.S. Virgin Islands, Hawaii and Puerto Rico mainly for honeymoon). The general sentiment for the upcoming summer season is in general very positive.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Japan

In 2012, Japan was the fourth largest overall source of inbound travelers (and second largest overseas source) to the U.S., attracting 3.7 million visitors. The total number of Japanese outbound travelers in 2012 was 18.5 million, an increase of 8.8% over the previous year, and the largest number in Japanese history. The U.S. continues to be one of the most popular destinations for Japanese tourists, and was the number one long-haul destination with a 20% market share in Japan in 2012. In 2012, Japanese spending in the U.S. was strong at US\$ 16.5 billion, and represented the second largest source of international tourism spending in the U.S. after Canada. Trends show more Japanese, especially baby boomers with high incomes, will continue to travel in the future, with NTTO predicting Japan as the largest source of overseas visitors to the United States for the next four years, at nearly 4 million and rising.



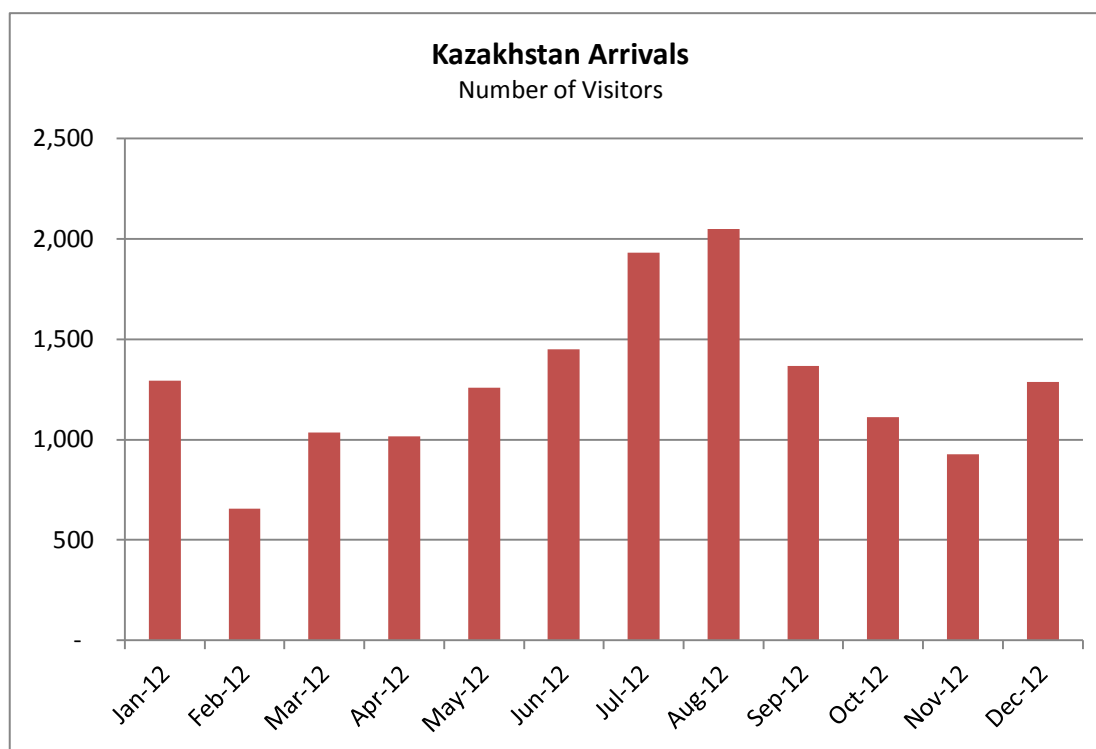
*\*Data Source: National Travel and Tourism Office ITA/DOC*



## Kazakhstan

Kazakhstan is an upper-middle-income country, rich in mineral resources, with per capita GDP of nearly US\$ 13,000 in 2013. Kazakhstan's economy is expected to grow by at least 5.5% in 2014 thanks to its booming energy sector. Outbound tourism accounts for the largest tourism activity in Kazakhstan, growing by more than 19% in 2013 (in comparison with 2012) with more than seven million travelers, even though the country's population is less than 20 million people. Kazakhstan's tourists traditionally travel across Europe and South East Asia with an average travel package bill of US\$ 810-\$2,000 according to local agencies. Kazakhstan's tourists are looking for new destinations and local travel professionals look for new tourism products to offer to their clients as well the software to support their operations.

Since August 2013, five-year visas to U.S. are now issued to citizens of Kazakhstan. It's not difficult for Kazakhstan citizens to get U.S. visas and since last year the number of travelers to the U.S. was up by 37%. Kazakhstan is situated between Russia and China, 7 hours flight time from London and 3.5 hours from Delhi. Kazakhstan is the 9th largest country in the world in terms of land territory and that makes air travel to and out of country long from most of Europe and Southeast Asia. According to the local airline's sales office, the top destinations for Kazakhstan's passengers are: New York, Miami, Washington D.C., San Francisco, Los Angeles, Chicago, Las Vegas, Atlanta, Boston, Houston, and Hawaii. The most interesting for developing leisure traffic are New York City, Miami, San Francisco and Hawaii, and across-state tours.

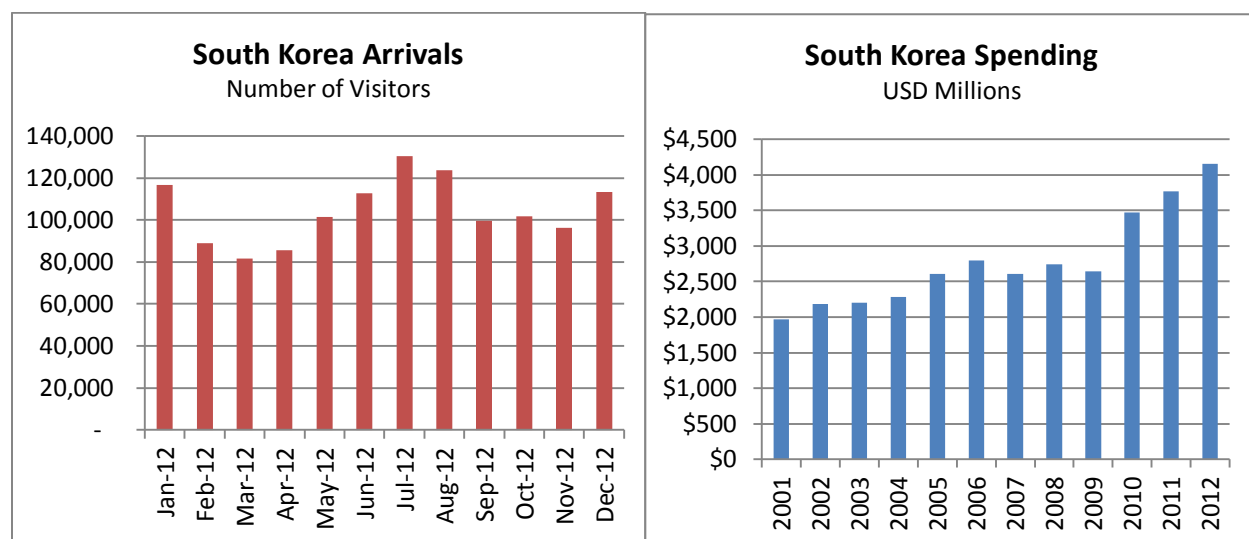


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Korea (South)

In 2013, over 14.8 million Koreans, roughly one fourth of the population, traveled abroad and more than 1.2 million traveled to the U.S in 2012. By 2014, it is estimated that 1.41 million Koreans will travel to the U.S. On average, a Korean visitor to the U.S. spends approximately US\$ 3,320 per trip. This number translates to over US\$ 4 billion yearly in tourism revenue from Korean outbound travelers to the U.S. Korea's incredible economic growth over the past 30 years has transformed the country, moving it from the ranks of developing nations to exclusive membership among the world's most developed and richest economies. Korea's per capita GDP in 1963 was just US\$ 100. Today, it exceeds US\$ 31,000. It is estimated that the economic growth in 2012 and 2013 reached 2.0% and 2.8% respectively, according to OECD. Increased income has given Koreans the means to seek and enjoy leisure travel abroad. Industry experts expect that the number of outbound travelers will continue to increase for the next five years and that demand for sophisticated and niche market travel, like MICE, cruises and educational tourism will grow significantly.

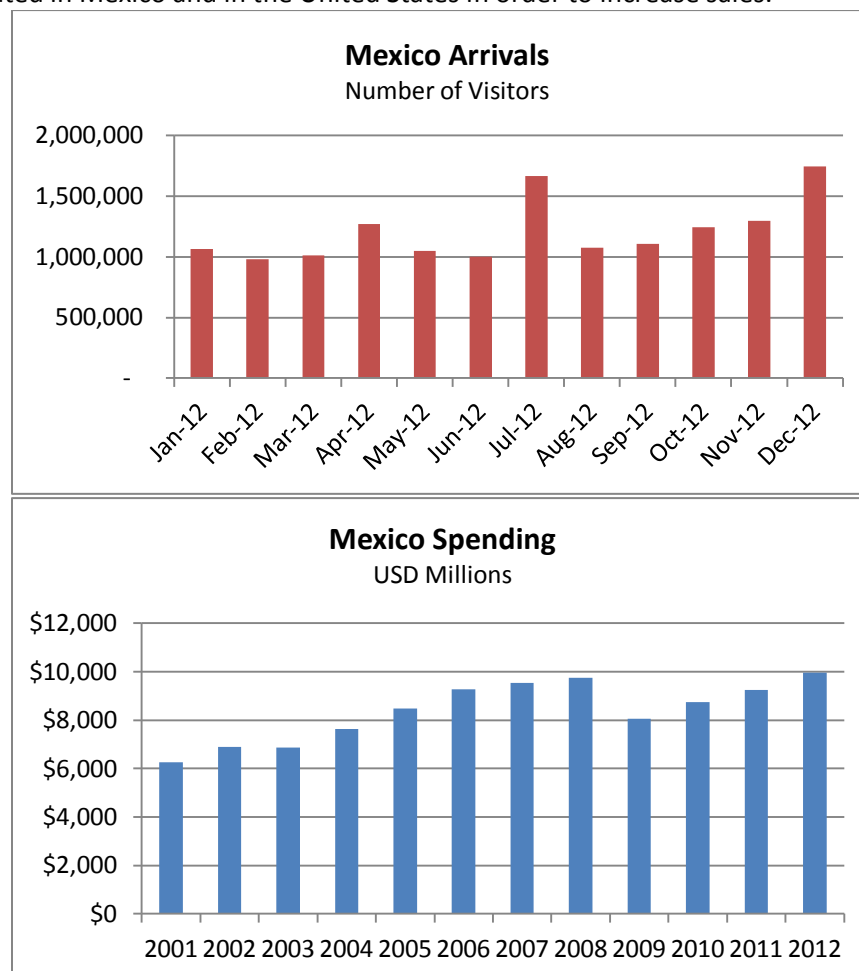
The U.S. remains one of the top five destinations for Korean outbound travelers, and is the top non-Asian long haul destination. However, a number of challenges face the U.S. in the Korean travel market, namely, aggressive marketing by competing visa-free destinations such as Australia, China, Japan, Thailand and Europe. Recently the U.S. established Brand USA representative office in Korea by contracting with AviaReps in 2012. The organization is actively promoting the U.S. as a whole destination and to educate and monitor the market of over 9,000 strong travel agents, tour operators and owners. Additionally, 60 years of strong economic and political ties and the visa waiver program for Koreans all contribute to the opportunity to further develop the Korean outbound travel market who enjoy foreign travel.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Mexico

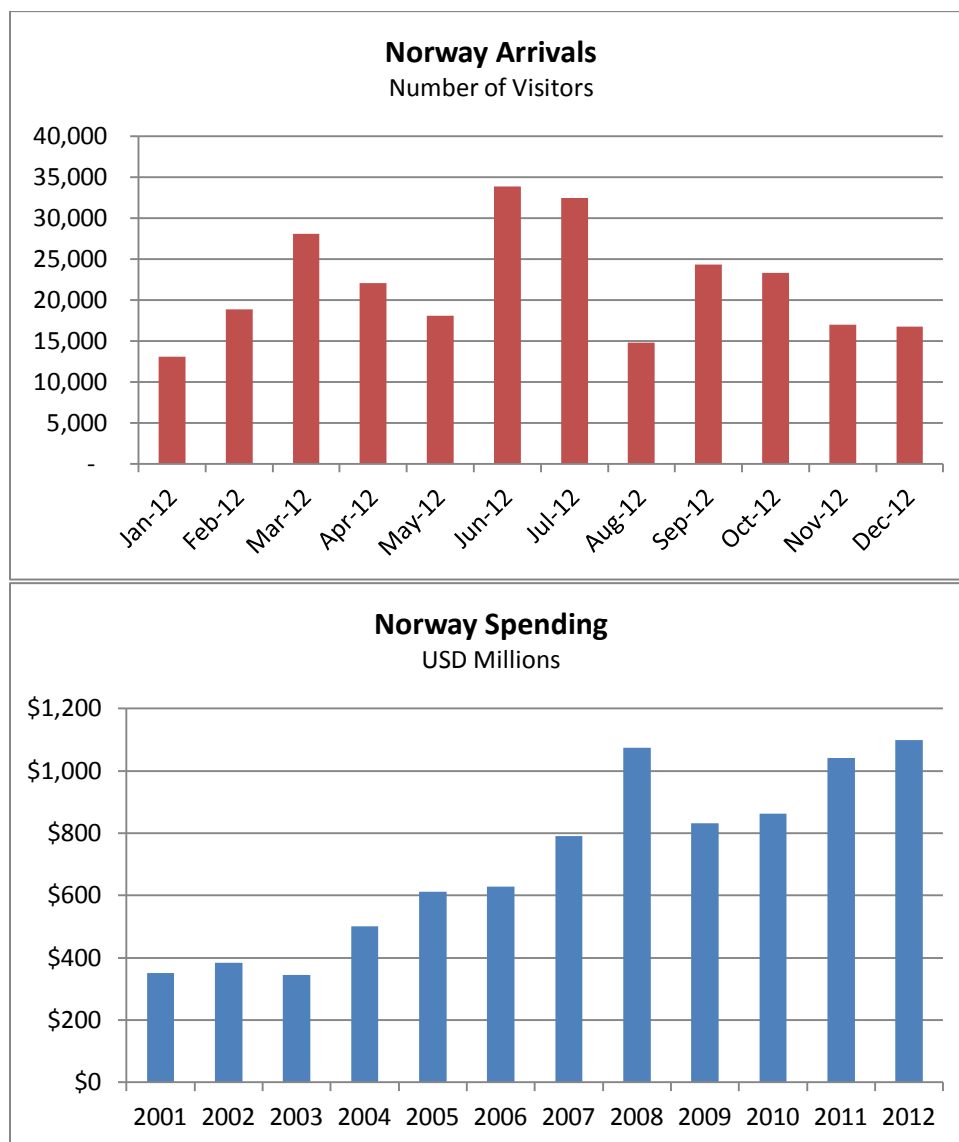
The United States is the most important destination for Mexican travelers. In 2012, 14.51 million Mexicans traveled to the United States, representing almost a quarter of the total foreign arrivals to the country. In 2012, Mexico was the second highest source of international travelers to the United States just after Canada. In 2012, Mexican visitor volume expanded for a third consecutive year and surpassed the 2000 record of 14.3 million. Additionally, in 2012 visitors from Mexico spent a record-breaking US\$ 10 billion in the U.S. Now it is more important than ever for U.S. destinations and tourism services to market themselves aggressively in Mexico to tap into this lucrative market. Mexican visitors can be classified into four categories based on the purpose of their trip: vacation, business, visiting relatives or friends, and attending conventions. Mexicans are attracted to the wide range of activities and tourist locations that the United States offers such as: shopping, entertainment, gambling, recreation/sport, and cosmopolitan cities. Wholesale operators continue to be the most important distribution channel in the Mexican travel and tourism market with U.S. wholesalers and online tour operators becoming increasingly more important since they negotiate directly with hotels and other business areas within the industry. It is crucial to establish and maintain a personal relationship with the travel and tourism companies located in Mexico and in the United States in order to increase sales.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Norway

Record numbers of Norwegians are traveling to the U.S., reaching an all-time high of 270 000 travelers in 2013, contributing to the 1.2 million total Nordic visitors to the U.S. in 2013. Norway has largely remained sheltered from the world economic downturn, and many Norwegians have enjoyed an increase in their disposable income as a result of interest rate cuts. The strong Norwegian currency combined with good deals on hotel rooms, car rental, shopping etc. make the U.S. a very good value long haul destination. Because of this, Scandinavian Airlines has recently reopened their direct route from Oslo to New York. Continental Airlines has also increased the number of direct flights from Oslo to Newark Liberty Airport, opening it as a gateway to the rest of the U.S. for the Norwegian traveler. In addition, budget airline Norwegian has opened a scheduled, low cost, direct route to New York with the delivery of their new Boeing Dreamliner aircraft, in addition to a seasonal route opening to Fort Lauderdale.

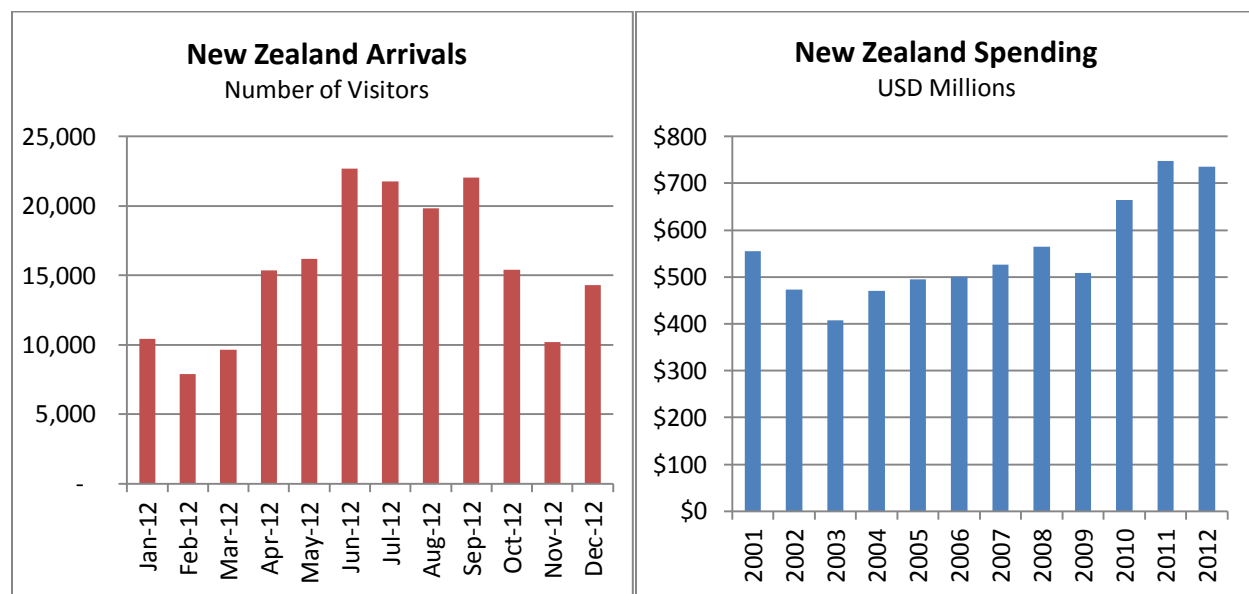


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## New Zealand

New Zealand represents a small geographically isolated country comprising of 4.4 million people. New Zealand's remoteness from other countries combined with strong family/business links has shaped New Zealanders as avid travelers, particularly to the United States. The United States is the second-most popular destination for New Zealanders after Australia and the 31<sup>st</sup> largest overseas arrival market for the United States in 2012. New Zealand visitors to the United States represent an almost equal combination of business travelers and those on vacation or visiting family and friends. The United States is New Zealand's third most important trading partner, and as a result New Zealand business travelers regularly attend U.S. trade events to remain up-to-date with new products and trends within their industry sector.

By the end of 2013, 142,200 New Zealanders traveled to the U.S., an increase of 16.9% over the previous year (Source: Statistics New Zealand). Air New Zealand and Hawaii Airlines both provide regular flights to the U.S. via Auckland, New Zealand's largest city. California and Hawaii are the most popular U.S. states for New Zealand travelers due to direct flights to Los Angeles, San Francisco, and Honolulu. New Zealand's fluctuating dollar means vacationing travelers tend to book in advance in order to secure the best travel deals.

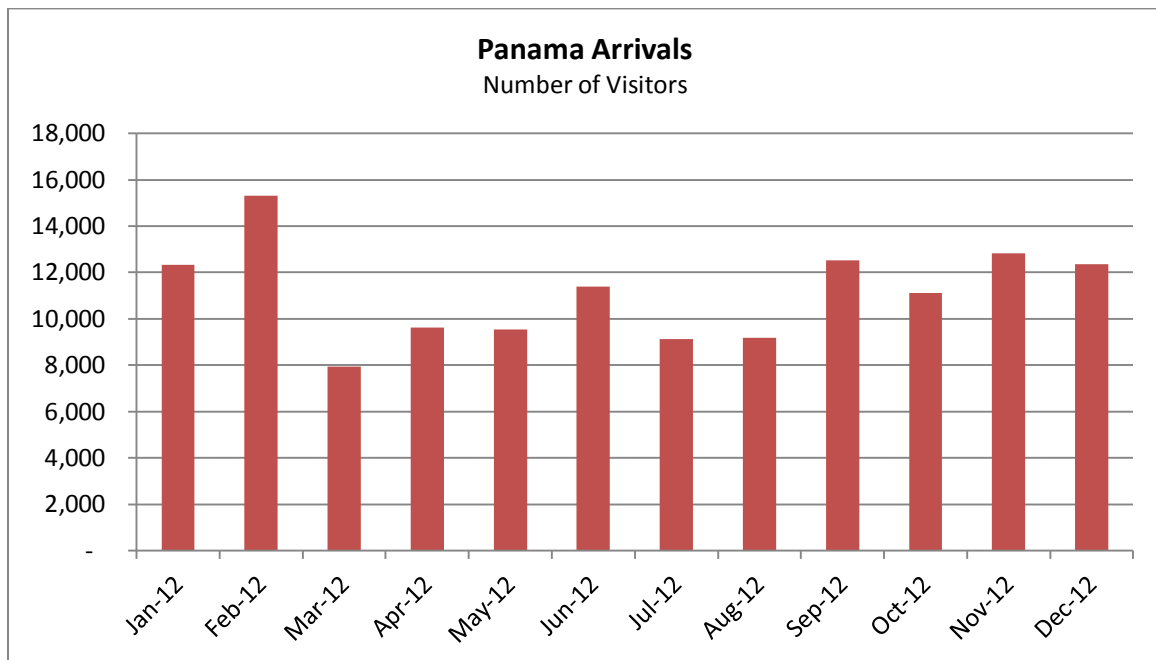


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Panama

Panama has historically served as the crossroads of trade for the Americas. Its strategic location as a land bridge between two oceans and the meeting of two continents has made Panama not only a maritime and air transport hub, but also an international trading, banking, and services center.

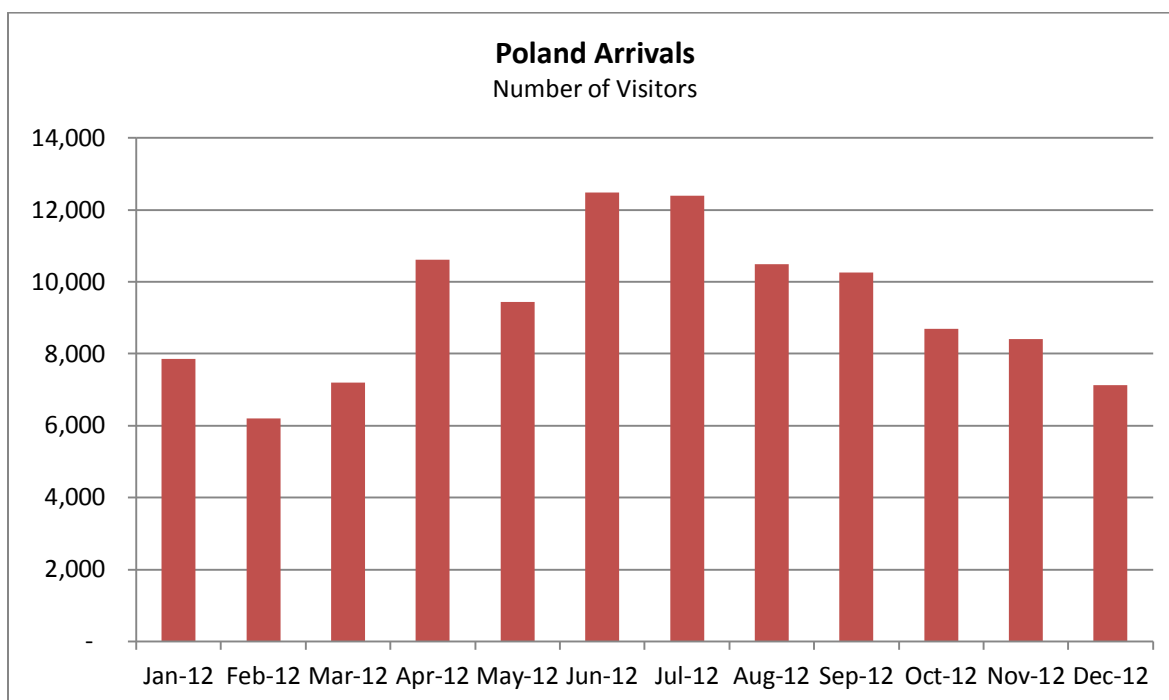
Panama's global and regional prominence is being enhanced by recent trade liberalization and privatization, and it is participating actively in the hemispheric movement toward free trade agreements. Panama's dollar-based economy offers low inflation in comparison with neighboring countries and zero foreign exchange risk. Its government is stable and democratic and actively seeks foreign investment in all sectors, especially services, tourism and retirement properties.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Poland

Polish participation in international tourism is significant and reached 10 million foreign touristic trips in 2012. Poles travel most frequently to other European countries, (Germany, Italy, Czech Republic, U.K., Austria and Holland are among the top foreign destinations in 2012), but long-haul destinations account for about 8% of Polish outgoing tourism, with Egypt, Tunisia and the U.S. being the most preferred long-haul destinations in 2012. The self-organized model of traveling prevails in Poland (78%), while 25% of tourists booked their travel with a professional travel bureau. The major purpose of Poles' travel is leisure (43%), followed by visiting friends and family (23%), and business (28%). According to the Office of Travel and Tourism Industries (OTTI), the number of Polish visitors to the U.S. accounted for 15% of all Eastern European visitors, and Poland is a leader among Eastern European countries in supplying visitors to the U.S. With over 110,000 arrivals, Poland was ranked 46th on the list of top 50 markets for international visitors to the United States in 2012. The U.S. as a tourist destination is not yet fully developed in Poland, since travel flow to U.S. is hampered by the U.S. entry visa requirement. Poland is the only country in the EU that is not a member of the U.S. Visa Waiver Program. Polish tour operators are reluctant to organize catalog trips to U.S. since acquiring a visa takes time and the outcome is uncertain. For this reason, traveling to visit relatives is the major form of Poland's outgoing tourism to America. There is a large Polish population living in U.S, mainly in the Chicago area. There are direct flights from Warsaw to Chicago and NY every day provided by the Polish carrier LOT. MICE trips represent another utilized form of organized travel to U.S.

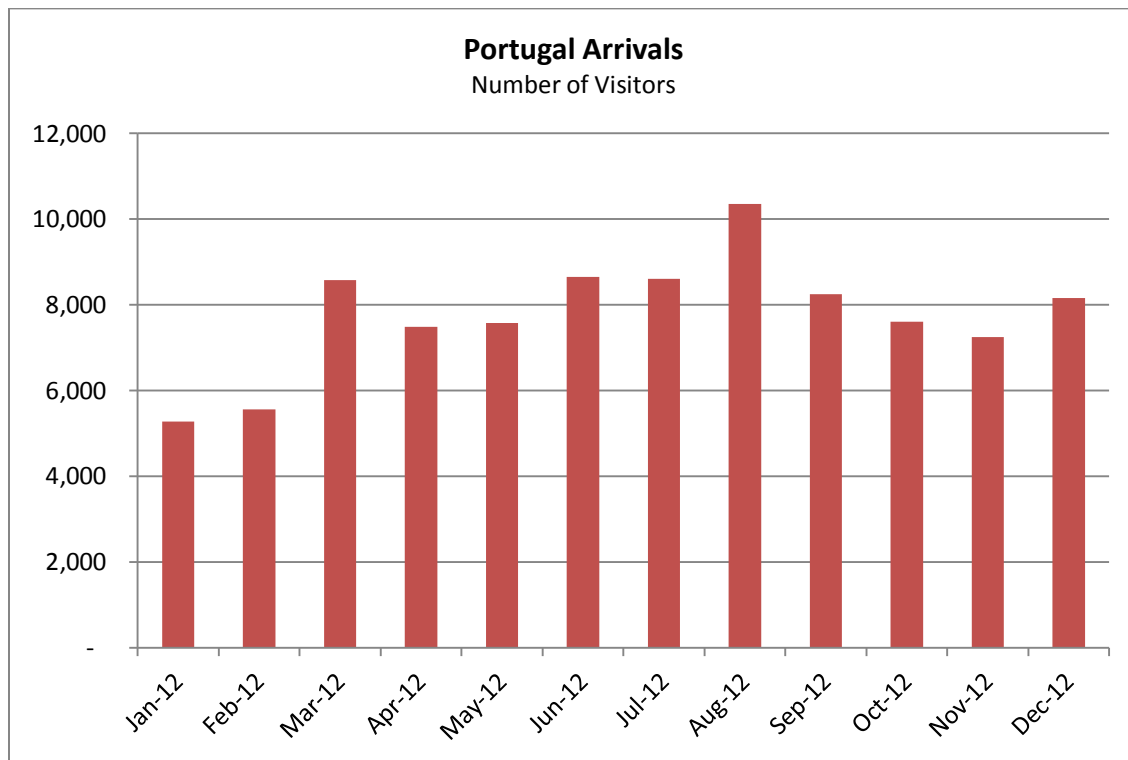


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Portugal

In 2012 Portuguese travelers to the United States decreased 2.9% for the period of January to November compared to the previous year. The financial situation in Portugal is the main cause of this decline. Despite the efforts of increasing awareness of the U.S. as a travel destination through many outreach events, the financial crisis is negatively affecting consumers.

With a strong Euro, increased airport security and inviting airfares, the U.S. remains a popular destination for Portuguese tourists. Most airlines, but specifically TAP-Portugal Airline and United Airways, two carriers with direct flights to Newark, registered increases in the number of U.S. bound Portuguese, as well as the U.S. Airways direct flights to Philadelphia, and SATA-Azorean Airline direct flights to Boston. In fact, US Airways was awarded the Highest Increase in Passenger Traffic award by the Portuguese Airport Authority, ANA-Aeroportos de Portugal. In 2011 due to the general increase of passenger traffic to the USA, the Portuguese Airline, TAP, initiated a new direct flight five times per week from Lisbon to Miami, Florida.



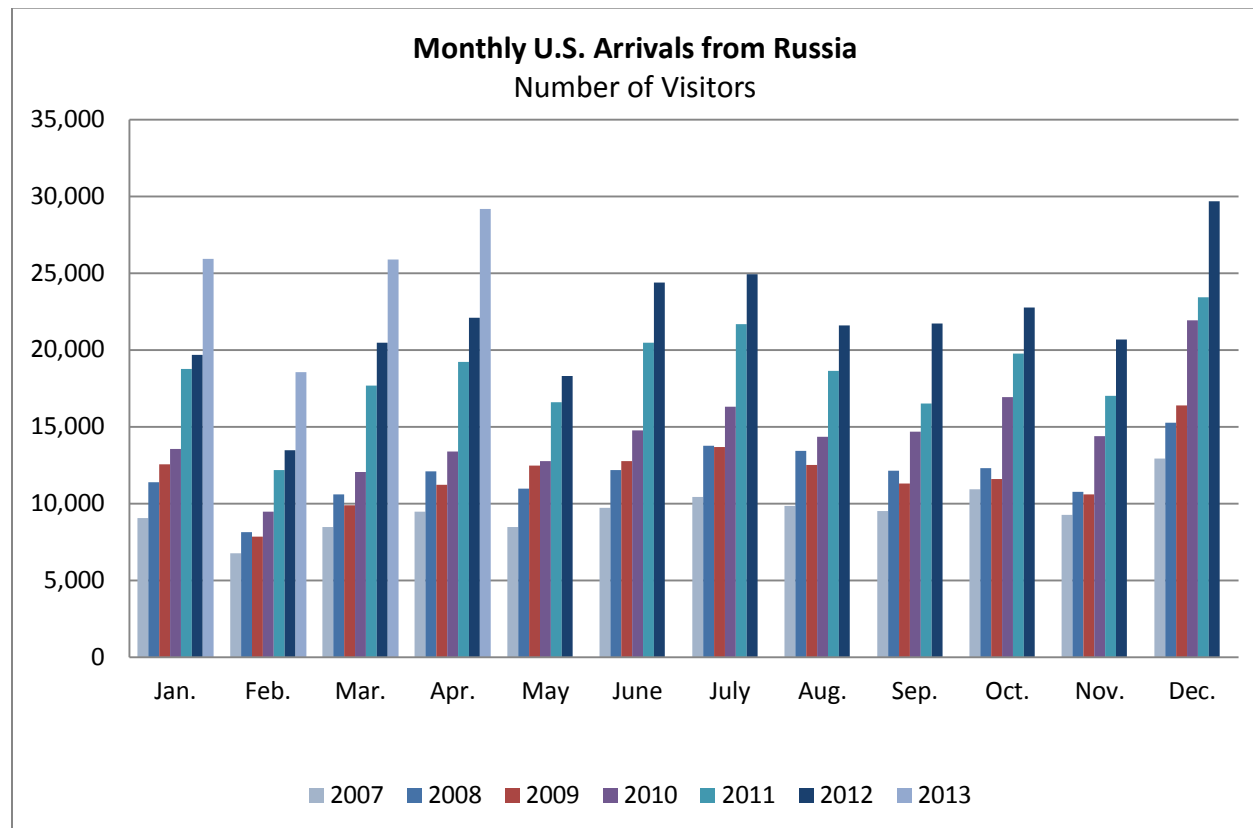
*\*Data Source: National Travel and Tourism Office ITA/DOC*



## Russia

With a population of over 140 million, and the highest GDP per capita of BRIC Countries (\$15,900 versus \$10,800 in Brazil, \$7,600 in China, and \$3,500 in India), Russia is the ninth largest outbound travel market in the world. The nation is also among 5 top tourism spenders in the world. Russians made over 47 million international trips in 2012, including 260,000 to the U.S. For the first four months of 2013, Russian inbound travel to the US has shown a record 32% growth, which makes it the fastest growing market for foreign travel to the US (minimum 50,000 arrivals). The average stay of Russian tourists in the U.S. is 18 nights, which is considered longer than stays by travelers from other countries.

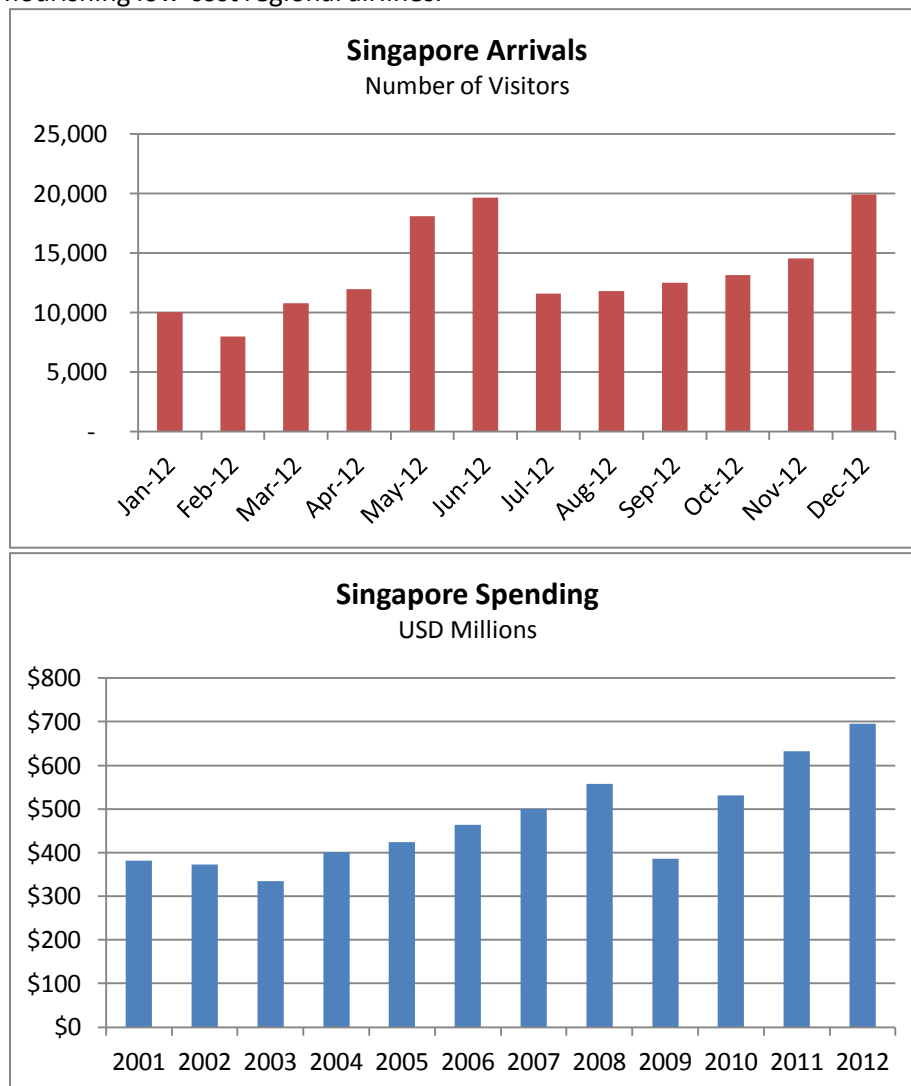
As the growing Russian middle class discovers new routes that cater to their tastes and budget, U.S. destinations are becoming more popular among Russian tourists. The figures below demonstrate the growth of Russian arrivals to the U.S. that has been consistently strong even during the economic crisis, and the high potential for Russian inbound visitation to the U.S. New direct passenger flights to the United States and simplified U.S. visa procedures have helped make travel to the United States more attractive for Russian travelers. While the financial crisis of 2009 interrupted the rapid growth of the Russian T&T market, 2010 - 2013 showed continuation of the positive dynamics, and experts' longer-term forecasts are extremely optimistic.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

# Singapore

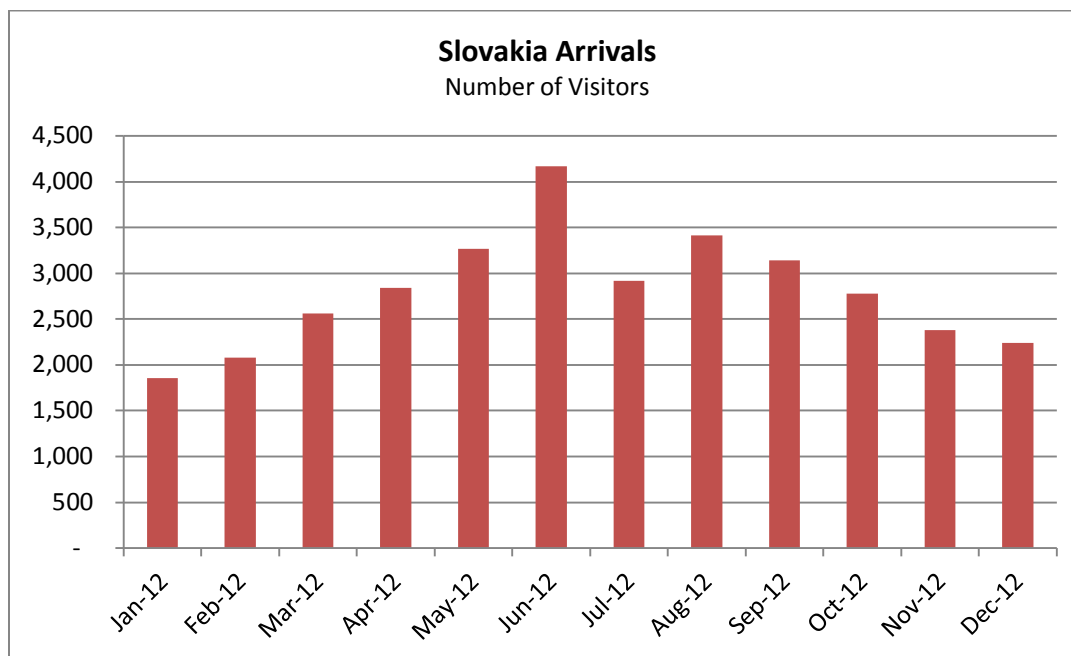
According to 2012 statistics, there has been an estimated 2% increase in the number of Singaporeans visiting the U.S. compared to last year. The U.S. faces more competition due to Europe being much cheaper to visit than in previous years, especially with the weakening Euro. More than US\$ 150 million of travel packages were sold at the 2012 b2c NATAS travel fairs despite the uncertain economic climate. With a modern sophisticated economy as well as being a regional hub for Southeast Asia and a GDP per capita of US\$ 53,000, Singapore ranks in the top 25 for overall tourism expenditures in the U.S. and top 50 inbound tourists to the U.S. Due to its small size, domestic tourism is virtually nonexistent in Singapore. This deficiency, paired with a high standard of living, promotes a culture that enjoys overseas travel. As such, competition for the Singaporean tourists' dollar is strong. Singaporeans tend to visit the bigger cities where there is good food and lots of shopping, but the younger generation is looking for more outdoor adventures. Although the U.S. is an attractive destination for the Singaporean traveler, it must compete with other popular global destinations in addition to the affordability of Asian countries as a result of flourishing low-cost regional airlines.



\*Data Source: National Travel and Tourism Office ITA/DOC

## Slovak Republic

For years under Communism, Slovak citizens were not allowed to travel to Western countries. The U.S. “across the big puddle” therefore became a dream for many, as a symbol of democracy and a better life. After the end of Communism, travel to the U.S. was no longer a dream but realistic for those who could afford it, as well as a new dream home for some, legal or not. However, entry to the European Union, Schengen, and the Euro zone through the 2000s meant an increase in living standards and opportunities to work elsewhere in Europe and a switch to legitimate tourist and business travel. Today, most visitors travel visa-free while exchange programs, skilled workers and students constitute a steady stream of travelers to the U.S. Since November 17, 2008, Slovak citizens with biometric passports can travel to the U.S. with an approved registration in the ESTA electronic system of travel authorization instead of a visa when planning to go to the USA for business or tourist purposes. There was an immediate increase in overall travel among Slovak citizens to the U.S. in 2009 that has continued to increase incrementally over time. In 2008, nearly 29,000 Slovak citizens entered the U.S. In 2009, that number was over 36,000, and by 2012, almost 47,000 Slovaks entered the country. After Slovakia became part of the Visa Waiver Program, applicants for visitor visas sharply decreased while categories that still need visas stayed relatively constant, about 4,500 per year meaning the visa waiver program can be attributed the increase in Slovak visitors to the U.S. Many Slovaks travel individually to cities like New York or Miami, while others choose travel agencies to help them navigate what they still might consider a confusing place. Other tourists come for brief study programs, package tours, or as older people visiting relatives and for all kinds of conferences and business trips. The average visit lasts 1-2 weeks. Tourists stay in mid-priced hotels or often, especially on longer trips, with relatives and friends. Besides experiencing world-class cities, Slovak visitors’ favorite activities involve the beach, the outdoors, national parks, theme parks, hiking and skiing. In 2013, representatives of Customs and Border Protection attended the SlovakiaTour fair, the country’s largest, to promote ESTA.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

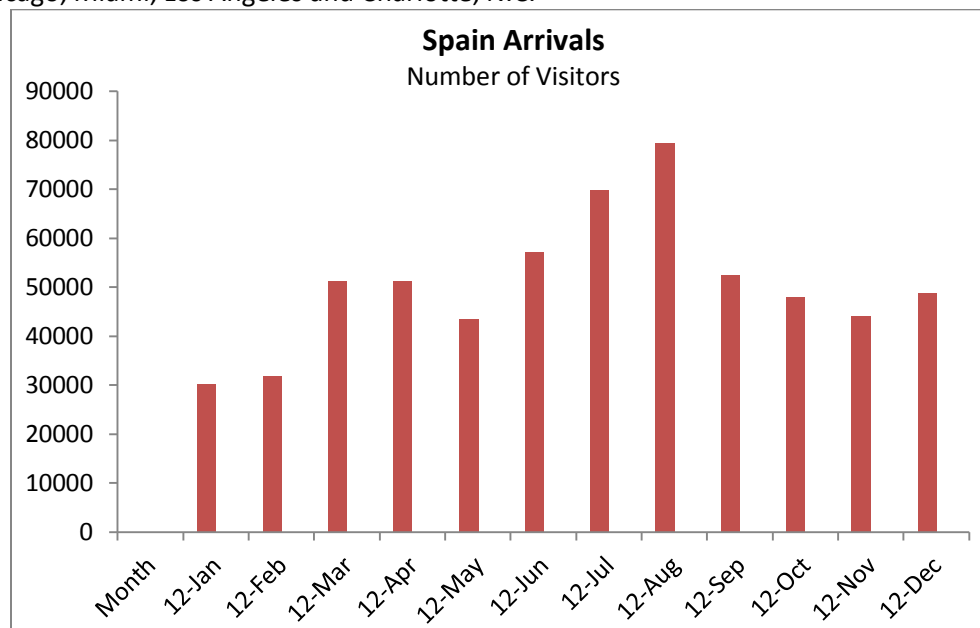
# Spain

Spain is the 5th largest European market for the United States, coming behind the U.K., Germany, France, and Italy. Long distance travel accounts for approximately 10 percent of foreign travel, with the most popular long haul destinations being the United States, followed by Mexico, the Dominican Republic, Ecuador and Brazil.

The growing commercial ties between the Spain and the U.S. and the increasing awareness and curiosity about the United States in general, particularly among the younger generation, makes Spain a market of opportunity for a wide variety of U.S. destinations. It is estimated that Spanish arrivals in the U.S. in 2013 will be in the 640,000 range, which is a significant increase from previous years now that Spain is on the road to economic recovery. Despite a marked downturn in 2012, the United States was the single long-haul destination to hold its own, with about 607,000 visitors.

80% of Spanish travelers who visit the United States come for leisure and to visit friends and relations. Business trips and conventions account for the remaining 20% of visitors. Spaniards like to go shopping, dining, sightseeing, visit historical locations, take guided tours, visit national parks and monuments, visit art galleries and museums, and recently skiing and golfing have become major attractions as well. More varieties of activities, especially at gateway cities, will attract increasing numbers of Spaniards. The regions that generate most U.S. bound travelers are Madrid, Barcelona, Valencia and the Basque Country (in the north of Spain). Additionally, Spaniards seem to prefer to make their own ticket purchases online and shop for package deals.

The most popular destinations continue to be New York, Florida, California, Colorado, Arizona, and Las Vegas. Additionally, Hawaii, Alaska, Washington D.C., and Boston have become increasingly popular. The increased number of direct routes will begin to have more of an impact on where Spaniards are visiting. There are now direct flights to Boston, New York, Washington, D.C., Philadelphia, Atlanta, Dallas, Chicago, Miami, Los Angeles and Charlotte, N.C.

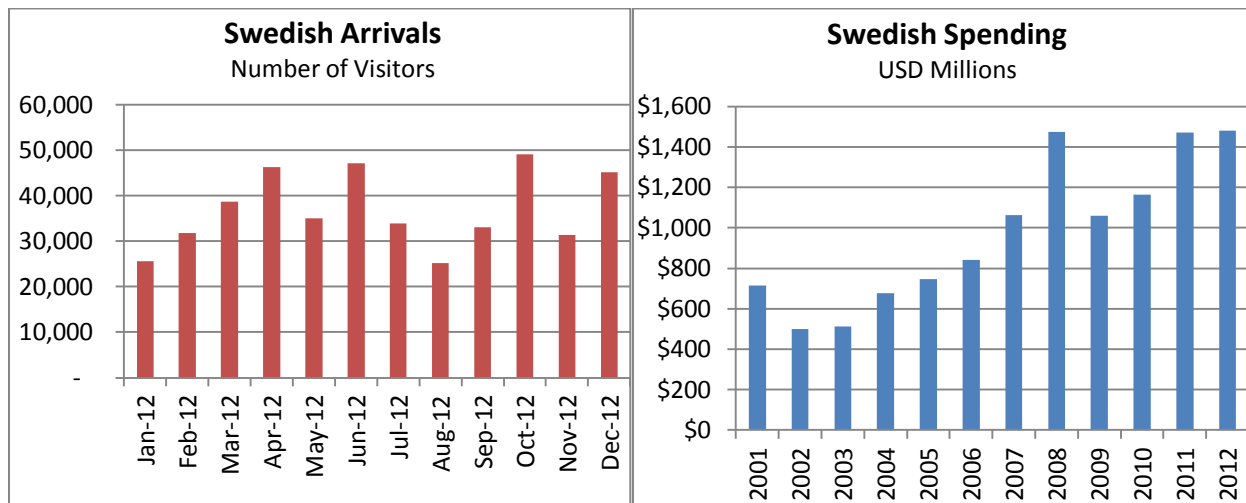


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Sweden

The Travel and Tourism industry is one of the largest industries in Sweden, and the Visit USA segment is quite significant. The T&T industry is the largest source of revenue for the United States and is one of the largest employers in the U.S. Sweden offers excellent business opportunities and has established itself among the top 20 international feeder markets (currently ranked at 19) of non-resident arrivals to the U.S. In 2012 Sweden contributed 442,000 visitors to the US (about 4.5% of its entire population) which was an increase of 0.7% from 2011, and the Nordic Region in general contributed a total of 1.2 million visitors. Sweden currently ranks 4<sup>th</sup> in number of visitors to the U.S. from Europe, with many being repeat visitors. In March of 2010 Sweden also adopted ESTA, as many European countries did, making foreign travel easier and more attractive to Swedes. The number of Swedes visiting the U.S. is predicted to increase, especially if Swedish currency continues to stay strong against the dollar. Also due to favorable exchange conditions, Swedes have a very strong interest in shopping.

Each Swedish visitor spends approximately \$500-\$600 per day during their stay, and the average length of stay is 16-21 days. One of the largest and most important segments of this market are retirees between ages 55 and 75 who have an abundance of time and money, and are strongly interested in leisure travels. Beach destinations have also become quite popular amongst Swedes. There are about 750 travel agencies operating in Sweden, and tour operators reported a 20% increase in booking to the U.S. in 2013. Package trips and tours are very popular among Swedes, though many prefer to book airfare and activities online themselves to shop for the best prices. Fifteen major international airlines service direct flights from Sweden to 10 major U.S. cities making travel from Sweden to the U.S. cheaper and easier than ever.

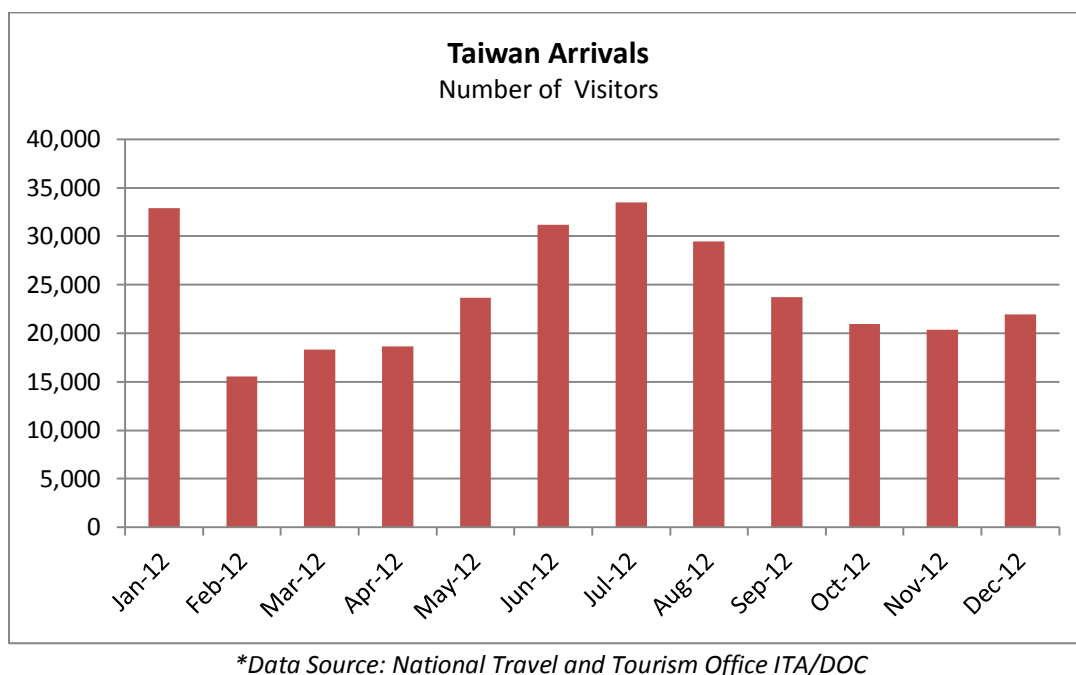


*\*Data Source: National Travel and Tourism Office ITA/DOC*

## Taiwan

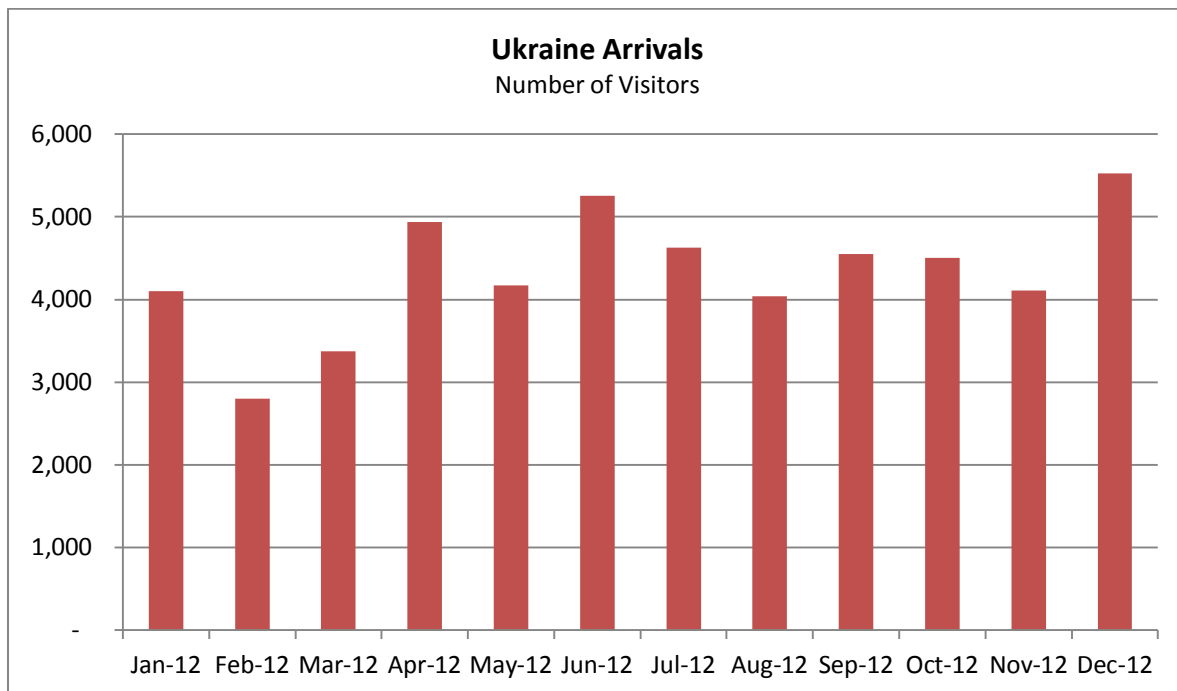
The United States is the top long-haul destination for Taiwan's outbound travelers and America welcomed nearly 300,000 visitors from Taiwan in 2012. Taiwan joined the Visa Waiver Program (VWP) in November 2012. In the first six months of 2013, travelers to the U.S. increased by over 30% from the previous year, numbers which will continue to grow now that travel to the U.S. has been made easier.

Taiwan is a \$1.2 billion travel and tourism market for the United States and this significant outbound tourist market is supported by over 40% of its 23 million people who go abroad each year. Taiwan is the United States' 12th largest trading partner. Taiwan is also the 6th leading source of international students to the U.S. Taiwan's GDP is US\$ 474 billion with a per capita of GDP of US\$ 20,400. The top U.S. destinations for Taiwanese travelers are California, Guam, New York, and Nevada. Top U.S. cities visited include Los Angeles, San Francisco, New York City, Las Vegas, Seattle, San Jose, Chicago, Boston, San Diego, Honolulu, and Anaheim. Different attractions from new destinations could be highly successful among Taiwanese tourists, provided that promotion of these activities takes place in gateway cities. Taiwan maintains good air connections to the United States with over 800 weekly flights and over 60 weekly non-stop flights.



## Ukraine

Ukraine represents an intriguing market for the U.S. travel industry with over 45 million residents and a developing middle class. The National Travel and Tourism Office of the U.S. Department of Commerce reports impressive and steady growth in Ukrainian arrivals to the U.S. starting back in 2003 with 15,000 annual visitors, and reaching more than 80,000 visitors in 2012. The United States is becoming an increasingly popular tourist destination for Ukrainians. Outbound tourist departures to the U.S. have been increasing by an average of 9% a year for the past three years. Simplified U.S. visa procedures and the depreciation of the U.S. dollar against the Euro have helped make travel to the United States more attractive and affordable for Ukrainian travelers. The outlook for 2014 is unclear though due to current political crisis in Ukraine that is likely to hurt the economy, including the tourism industry.



*\*Data Source: National Travel and Tourism Office ITA/DOC*

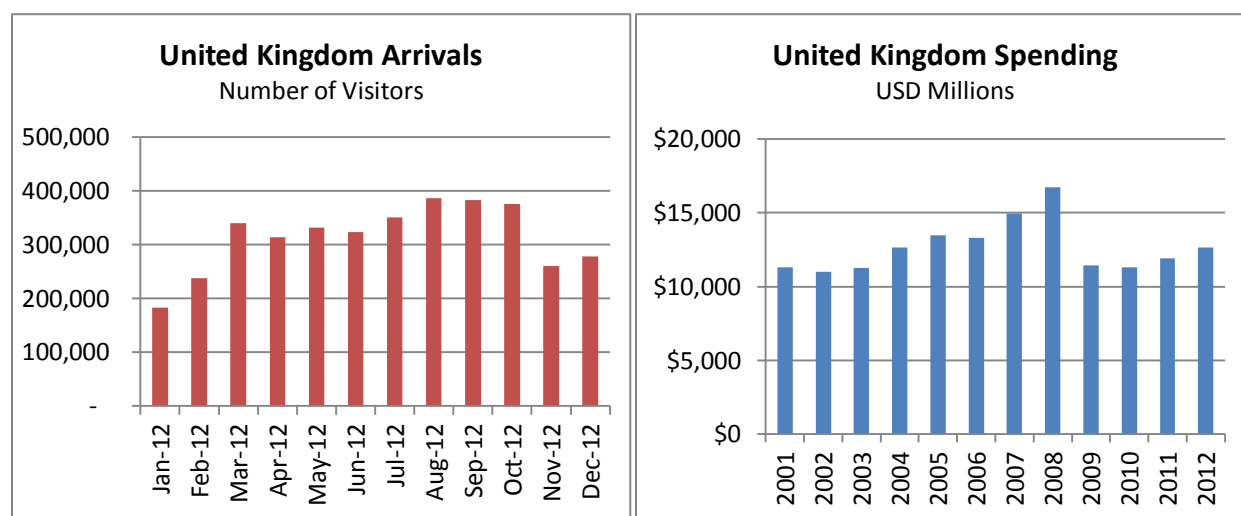
## United Kingdom

Following three straight years of decline, many within the UK T&T industry expected that 2013 would see a return to growth in U.K. outbound travel to the U.S. Latest figures from the U.S. National Travel and Tourism Office suggest this will not happen. The best estimate is that 2013 will show a decline of around 1% compared to 2012. However, estimates for 2014 are more promising. Many tour operators report good forward bookings and there is growing speculation that the year will see further improvement, especially if the recent growth in the U.K. economy is maintained.

The surge in optimism mentioned above followed Brand USA's two U.K. specific marketing campaigns. Together, these generated a sharp rise in the intent to visit the U.S., with the campaigns highlighting the diversity of places to visit and things to do throughout the entire U.S. Many anticipate this intent to visit will convert into actual bookings in 2014.

Recent economic figures released by the U.K. Office of National Statistics show that the U.K. economy is recovering, although it is still 1.3% below the pre-recession peak. Growth of 1.9% in 2013 is expected to be followed by growth of up to 3% in 2014. The think-tank Oxford Economics has forecasted that the UK manufacturing sector, which accounts for 10% of the economy, will grow 2.7% this year placing it ahead of all other western European countries in the think-tank's forecasts. Rising housing prices accompanied by resurgence in the construction sector and the high-flying services sector have also contributed to the ongoing economic recovery. The continuing slight fall in both unemployment and inflation provide further cause for optimism.

This injection of confidence will be welcomed by consumers who have waited several years for an indication that the economy was improving. This, coupled with Brand USA's 2013 marketing strategies, including their first "mega FAM" for 100 travel agents in May, could provide a much needed stimulus for U.K. travel to the U.S. in 2014. Results from first edition brochures have also been promising although it is too early to accurately project a figure, but a cautious forecast of 2%-3% growth for 2014 seems a likely scenario.



*\*Data Source: National Travel and Tourism Office ITA/DOC*





**U.S. DEPARTMENT OF COMMERCE  
INTERNATIONAL TRADE ADMINISTRATION  
INDUSTRY & ANALYSIS**

**NATIONAL TRAVEL AND TOURISM OFFICE  
PROGRAM OVERVIEW**

The National Travel and Tourism Office (NTTO), in the U.S. Department of Commerce's Industry & Analysis division, operates a comprehensive and highly successful program of policy development, research, industry advocacy, outreach, and trade promotion to facilitate international travel to the United States and to increase U.S. travel and tourism exports. NTTO was previously known as the Office of Travel and Tourism Industries (OTTI) until a reorganization of the division (previously known as Manufacturing and Services, now named Industry & Analysis) took place on October 1, 2013.

NTTO is perhaps best known for managing a comprehensive statistical system that serves as the only official source for estimating the travel and tourism industry's value to the global economy as well as to the economy of the United States. This includes monthly measures of the travel flows to and from the United States and characteristics of those travelers.

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<http://www.export.gov/industry/travel>