

Travel and Tourism

Top Export Market Rankings



INTERNATIONAL
TRADE
ADMINISTRATION

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Explore the interactive tool at -

trade.gov/report/top-export-market-rankings-travel-and-tourism

Included Products



Most industries are defined by specific products or services, but travel and tourism is defined by the customer, or “visitor.”

One in every 20 jobs in the United States relies directly or indirectly on travel and tourism.



Travel and tourism is a critical driver of economic growth and employment in the United States, accounting for three percent of U.S. gross domestic product (GDP) and \$2 trillion of economic activity in 2019. The industry supports 9.9 million American jobs paying more than \$322 billion in employee compensation. Approximately one in every 20 jobs in the United States relies directly or indirectly on travel and tourism.

In 2019, 79.4 million international visitors spent \$239.1 billion while traveling to and within the United States. These “travel and tourism exports” accounted for 9.4% of total U.S. exports of goods and services.

While most industries are defined by specific products or services, travel and tourism is defined by the customer, who is referred to as a “visitor.” Travel and tourism revenue is measured by the real output of goods and services sold directly to visitors during their travel. Visitors can be both domestic travelers (domestic sales) and international travelers (travel exports). There are three primary subsectors for U.S. travel exports: personal travel (leisure, education-related, and health-related), business travel, and passenger fare receipts on U.S.-flagged carriers, such as Delta Air Lines, American Airlines, United Airlines, etc.



Tourism Commodities

These commodities are considered exports when the visitor using them holds a foreign passport. Customers using a U.S. passport represent domestic sales.

Traveler Accommodations

- ▣ Food and beverage services
- ▣ Transportation
 - ▣ Passenger air transportation
 - Domestic passenger air transportation services
 - International passenger air transportation services
 - ▣ All other transportation-related commodities
 - Passenger rail transportation services
 - Passenger water transportation services
 - Intercity bus services
 - Intercity charter bus services
 - Local bus and other transportation services
 - Taxicab services
 - Scenic and sightseeing transportation services
 - Automotive rental and leasing
 - Other vehicle rental and leasing
 - Automotive repair services
 - Parking
 - Highway tolls
 - Travel arrangements and reservation services
 - Gasoline



- ▣ Recreation, entertainment, and shopping
 - ▣ Recreation and entertainment
 - Motion pictures and performing arts
 - Spectator sports
 - Participant sports
 - Gambling
 - All other recreation and entertainment
 - ▣ Shopping

Top Markets



#1 Market China

In 2019, the United States was the top destination of global long-haul (outbound) travel from China, constituting 13% of the market share.

#2 Market Canada

The trade relationship between the United States and Canada supports millions of jobs in each country, constitutes a USD \$1.7 trillion bilateral trade and investment relationship, and sees the United States as the top destination from Canada.

#3 Market Germany

In 2019, the United States was the top destination of global long-haul (outbound) travel from Germany, with a 15% market share.

#4 Market Mexico

Boosted by improving economic conditions and marketing campaigns to attract the Mexican traveler, Mexico will continue to be a top source of international travelers to the United States for the foreseeable future.

#5 Market United Kingdom

London Heathrow is the dominant U.K. airport connecting the United States and the United Kingdom, with additional direct flights to major U.S. cities originating London Gatwick, Manchester, Edinburgh, and Glasgow airports.

#6 Market Australia

Australians have a great propensity for travel and are entitled to four weeks paid annual vacation. As such, Australians visiting the United States travel farther, stay longer, and spend more than travelers from many other markets.

#7 Market France

The United States is one of the most popular destinations for French long-haul travelers.

#8 Market Ireland

Ireland has the highest per capita travel to the United States (share of visitors by population size) of all European countries and the third highest globally, second only to Canada and Mexico.

#9 Market India

From 2014 to 2019, the fastest growing destinations for Indian outbound travel were Thailand, the United Arab Emirates, the United States, Kuwait, and Singapore. Together, these accounted for 42% of the increase in Indian international travel.

#1 Market China



In 2019, the United States was the top destination of global long-haul (outbound) travel from China, constituting 13% of the market share.



Average Trip Spending

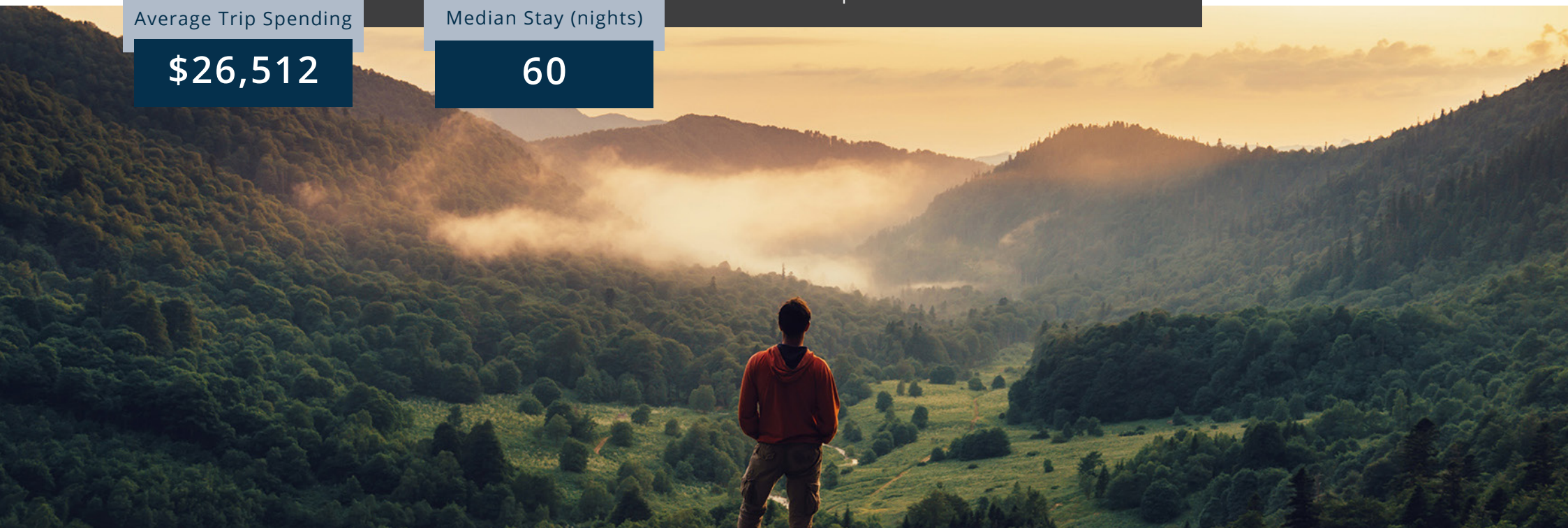
\$26,512



Median Stay (nights)

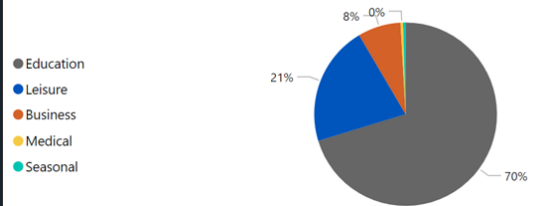
60

The average trip spending and the median stay (nights) in the U.S. are both important measures of the relative importance of a country as a source market for visitation to the U.S. The higher the average spending and longer the stay, the larger the economic impact.



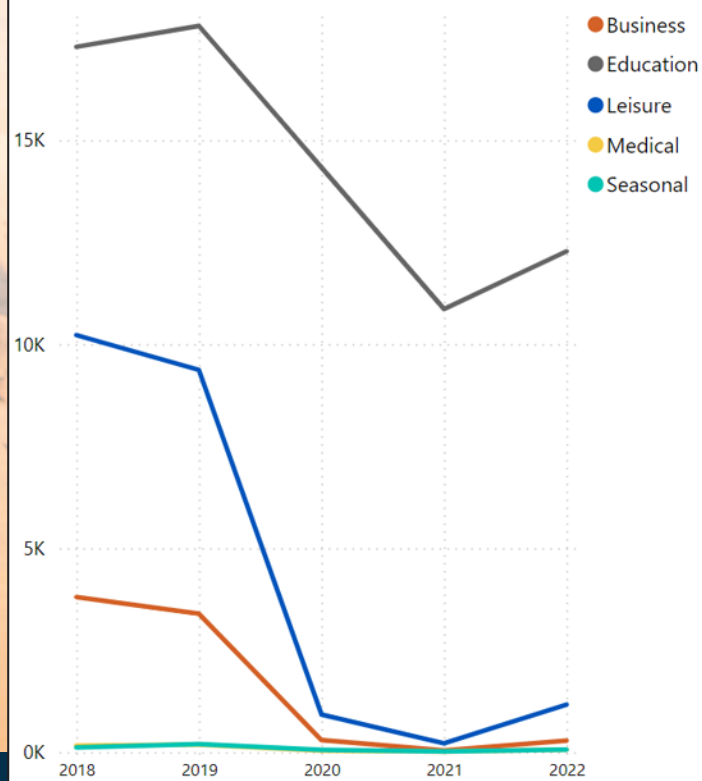
Top Indicators and Why They Are Important

Why are they traveling?



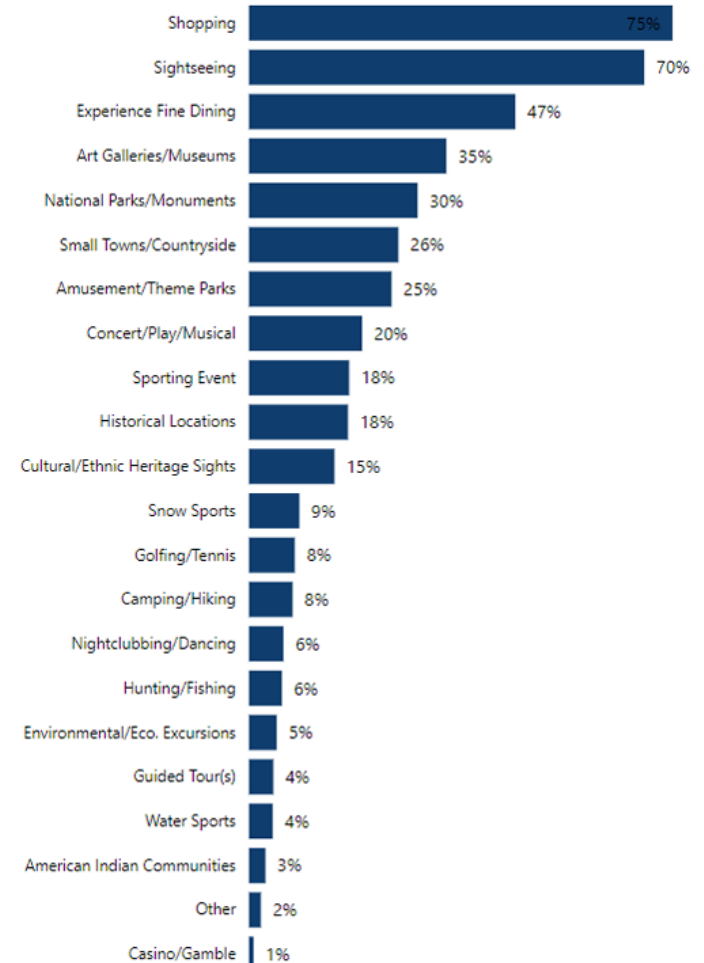
The type of travel is an important metric for understanding the source market. Different types of travelers are important to different U.S. industries.

Travel trends over time



Visitation over time provides insight on how each type of traveler to the U.S. changes over time. This is important in monitoring travel growth trends for each type of travel.

What are they doing?

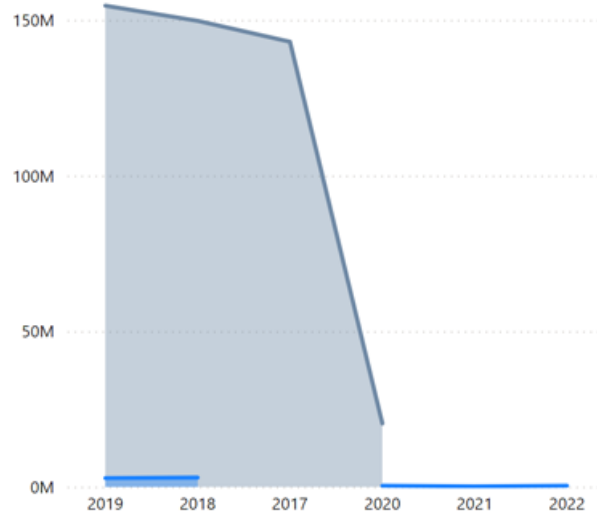


The types of leisure activities international visitors engage in during their trip to the U.S. provides critical insights about how international visitors spend their time/money and where the greatest subsector opportunities may exist.

Top Indicators and Why They Are Important (Continued)

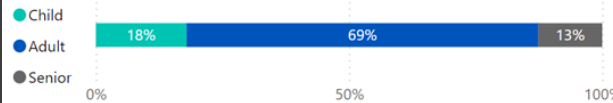
Where are they going?

● Total Int'l Travelers ● Travelers to U.S.



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

Population by age group

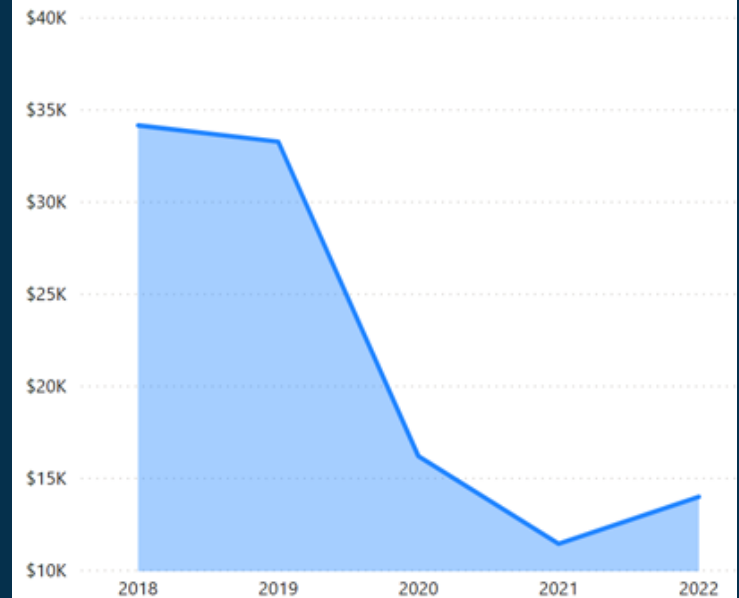


Population demographics provide information about what type of activities visitors are likely to participate in.

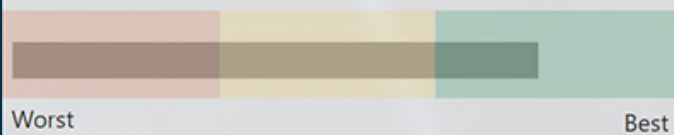
Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?

● Global Tourism Spending ● Spending in U.S.



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

China is the world’s second-largest economy by gross domestic product (GDP) since 2010. In fact, the Chinese economy is larger than those of the next four economies – Japan, Germany, the United Kingdom, and India – combined. With a population of 1.4 billion in 2019, 10.4% of households earn middle-class incomes, up from 2.9% in 2010. Because of the size of China’s population and the growing share of the population that can travel internationally, China has become a major source of global long-haul travel. In 2019, China was the second largest source of global long-haul travel (only behind the United States), up from the eighth largest in 2010.

Pre-pandemic (2015-2019), 7.5% of overseas visitors to the United States came from China, making it the third largest overseas source market for international visitation behind only the United Kingdom and Japan. In 2019 alone, China visitation to the United States totaled 2.8 million arrivals. During this same period (2015-2019), China was the largest source market for travel export dollars to the United States, with spending from Chinese visitors constituting 13.6% of U.S. travel exports. In 2019, Chinese visitors spent \$33.2 billion in the United States, accounting for 20% of U.S. exports to China.

The COVID-19 pandemic had a crippling effect on travel and tourism around the globe. From 2019 to 2021, Chinese visitation to the United States declined 93% to 192,000. In November 2021, the United States ended pandemic-related travel restrictions between the United States and other countries, including China. In 2022, Chinese visitation to the United States recovered to 368,000, or 13% of 2019 levels. In August 2023, China lifted pandemic-era restrictions on group leisure travel to the United States, which could facilitate additional travel to the United States. By 2023, Chinese visitation to the United States of nearly 1.1 million arrivals accounted for 38% of visitation in 2019.

Brand USA, the United States’ destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:



Top States Visited by Chinese Travelers in 2022

States Visited	Percentage of Chinese Travelers Visiting
California	42%
New York	34%
Massachusetts	12%
Washington	12%
Illinois	8%

	Top Motivations for Selecting Last Intercontinental Destination:	Strongest Impressions of the United States:
1.	Leisure Attractions	Energetic
2.	Appeal of Local Culture	Diverse
3.	Natural Features	Open-minded
4.	Sightseeing Opportunities	Creative
5.	Quality of Beaches	Adventurous
6.	Ease of Travel	Arrogant



Market Opportunities

Education Spending

China has been the top source of U.S. educational travel exports since 2010. Chinese students visiting the United States for education offer market opportunities as families invest in international educational trips, reflecting a desire to enhance their children's cultural knowledge and international exposure. Historically, large amounts of students from China choose to study abroad in the United States; however, the COVID-19 pandemic devastated tourism at all levels. In 2022, China's education-related travel exports to the United States recovered to 69% of 2019 spending. By contrast, recovery of all other Chinese travel exports in 2022 reached only 11% of 2019 spending.



Package and Group Travel

Historically, 34% of Chinese travelers report using a travel agency for trip planning, with another six percent using tour companies and 15% using corporate travel departments. This predilection to using travel packages presents an opportunity for U.S. providers across the sector (airlines, train/bus travel, accommodations, attractions, dining, etc.) to collaborate and package services to collectively reap increased travel exports.

Luxury Travel

China has seen a revival in the high-end travel market with the reopening of its border following the pandemic. Wealthy Chinese travelers are prepared to upgrade their travel spending by increasing overseas travel frequency and duration. These luxury travelers are demonstrating a growing preference for immersive, slow-paced, and high-quality experiences, extending to premium offerings such as first-class flights and luxury accommodations. This preference highlights a segment for businesses offering tailored services, cultural experiences, or wellness-focused packages. In [Outbound Rebound 2023: The Return of Chinese Travelers](#), a survey conducted by FINN Partners and CSG Research, nearly half of the respondents, who classify as China's high-income travelers, plan to make at least five trips in 2023, a slight increase from 2019 averages. Planned spending for 2023 is expected to rise by 15%, with an average budget of approximately USD \$15,299.

Extended Stay Travel

With an average stay of four months in the United States in 2022, which is nearly six times longer than the 21 days for overall overseas visitors, more than half of Chinese travel to the United States is extended-stay travel. Further, the majority of respondents to the FINN Partners and CSG Research survey report an intention to extend their vacation duration compared to pre-pandemic levels, and over a third of these high-end travelers plan to utilize premium travel and accommodation services.





Market Challenges

Safety Perceptions

Chinese tourism industry contacts regularly express their concerns that Chinese tourists have apprehensions to travel to the United States due to narratives broadcasted by Chinese state media. Chinese state media repeatedly highlight gun violence and anti-Asian sentiment in the United States, which could create a negative perception of the country amongst Chinese travelers. Morning Consult Pro's [The State of U.S.-China Relations: H2 2022 Report](#) showed that 57% of Chinese adults cited violent crime as a reason to avoid travel to the United States, with an even higher percentage of those interested in traveling to the United States expressing concern about violent crime.

Visas

Visa appointment demand in China has increased since the end of COVID travel restrictions. The United States began issuing multiple-entry B1/B2 visas with a validity of up to 10 years for Chinese applicants in November 2014. The first of these visas awarded are now in their final months of validity and will require renewal, potentially causing an upcoming surge in visa requests.

Geopolitics

Due to the war in the Ukraine, U.S.-flagged flights are restricted from Russian airspace, limiting the number of flights to China by U.S. airlines.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in China](#)
- [China Country Commercial Guide](#)



#2 Market Canada



The trade relationship between the United States and Canada supports millions of jobs in each country, constitutes a USD \$1.7 trillion bilateral trade and investment relationship, and sees the United States as the top destination from Canada.



Average Trip Spending

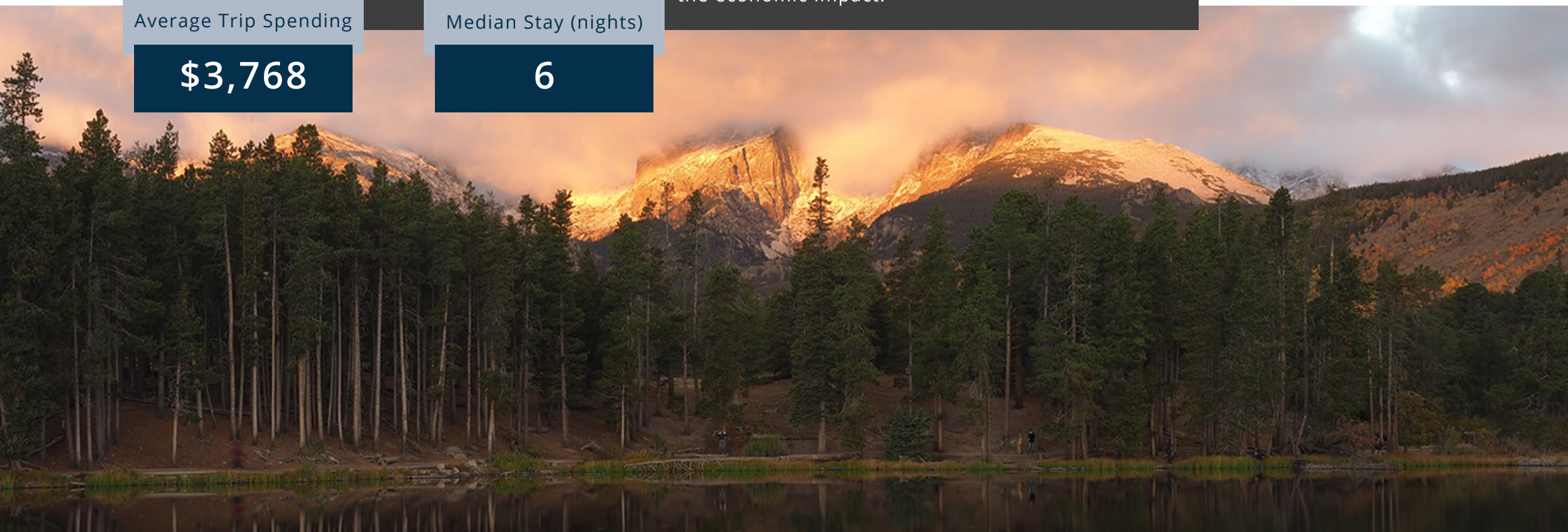
\$3,768



Median Stay (nights)

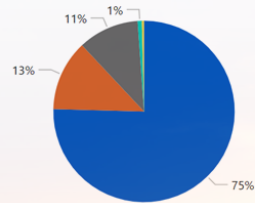
6

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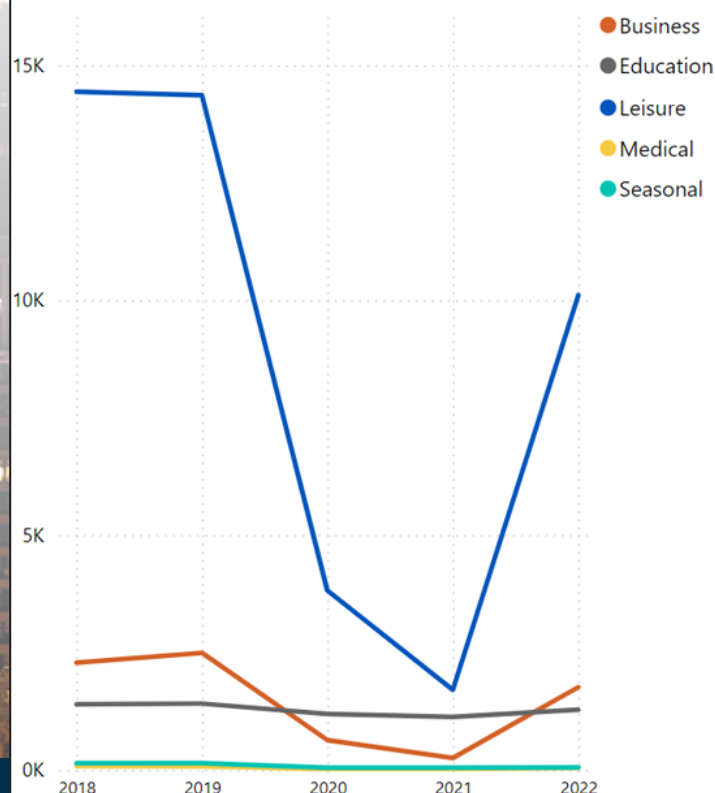
Top Indicators and Why They Are Important

Why are they traveling?



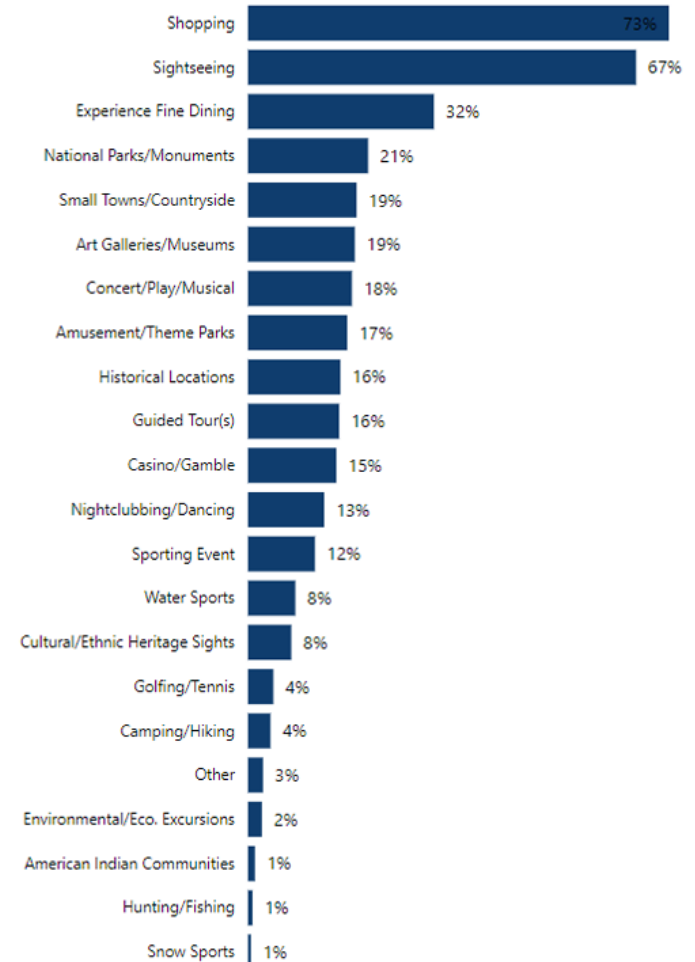
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Travel trends over time



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What are they doing?

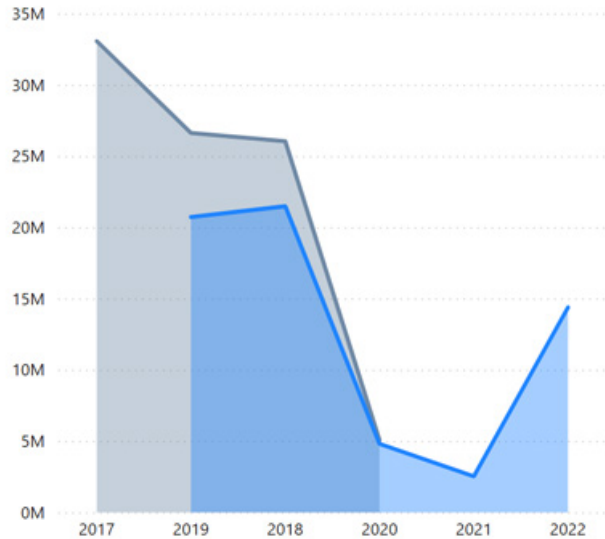


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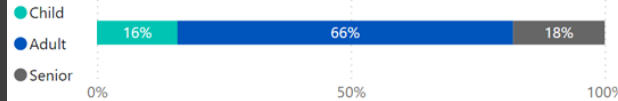
Where are they going?

● Total Int'l Travelers ● Travelers to U.S.



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

Population by age group

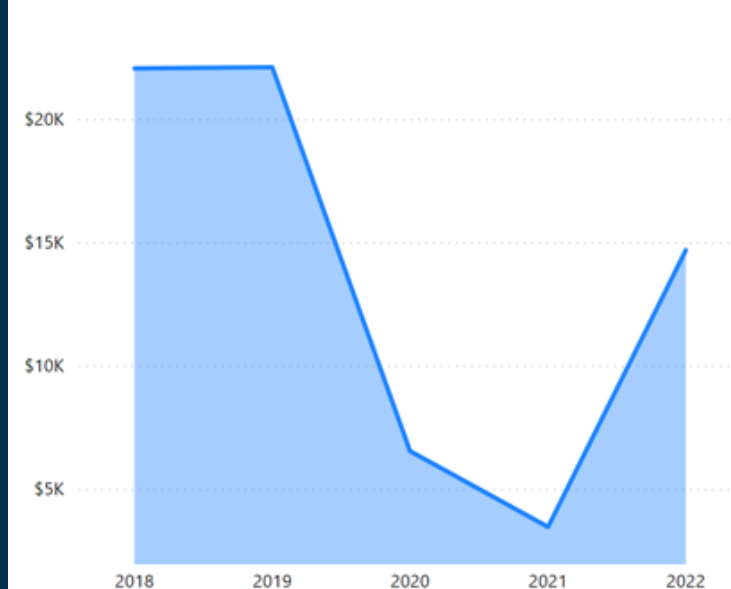


Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?

● Global Tourism Spending ● Spending in U.S.



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

The United States and Canada share the longest international border in the world, and the vast majority of Canadians live within 200 miles of that border, giving Canadian travelers the advantage of shorter travel distances to the United States and flexibility to travel via air, sea, and land. As further advantage, through long-standing relations between the two countries, Canadian citizens do not need a visa to enter the United States. Canada also participates in the Global Entry and Preclearance customs and border control program and has both an Open Sky Agreement and a Free Trade Agreement with the United States. The preclearance customs and border control program currently operates in eight airports across Canada, with new facilities planned for Toronto's Billy Bishop Airport to add new preclearance routes to medium-sized U.S. destination cities and airports. Toronto's Pearson Airport is among the top U.S. ports of entry due to the preclearance program. In 2023, Toronto Preclearance processed more than six million U.S.-bound travelers, up from four million in 2022 and compared to 7.3 million in 2019 (pre-COVID). Toronto also ranks first in the world for use of Mobile Passport Control, a free mobile app to expedite customs clearance.

Prior to the COVID-19 pandemic, Canada was the largest source market of international inbound visitation (number of arrivals) to the United States every year from 2000 to 2019. In 2019 alone, the United States welcomed 20.7 million Canadian travelers, accounting for 53% of Canadian total international outbound travel that year. Those Canadian travelers spent USD \$22.1 billion visiting the United States, accounting for nine percent of U.S. travel exports and six percent of total U.S. exports to Canada.

Brand USA, the United States' destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:



Top States Visited by Canadian travelers in 2022

State Visited	Percentage of Canadians Air Travelers Visiting
Florida	26%
California	20%
Nevada	14%
New York	14%
Texas	6%

	Top Motivations for Selecting Last Intercontinental Destination:	Strongest Impressions of the United States:
1.	Appeal of Local Culture	Energetic
2.	Ease of Travel	Diverse
3.	Natural Features	Adventurous
4.	Sightseeing Opportunities	Friendly
5.	Leisure Attractions	Arrogant
6.	Quality of Beaches	Wholesome



Market Opportunities

Travel on U.S. Air Carriers

Canada had more direct non-stop flights to the United States than any other country in 2023. On average, 34% of air passenger traffic was on U.S. carriers and the remaining 66% was carried on foreign airlines, indicating a U.S. air carriers have an opportunity to increase competitiveness for direct flights to and from Canada.

Road Trips & Rental Cars

With 5,525 miles of shared border, Canadians have the luxury of being able to drive into the United States. The comparatively lower costs of gasoline in the United States as opposed to Canada may make road trips more attractive to Canadian travelers, especially families or other small groups that would have to buy multiple seats on commercial travel options. In 2023, 32% of Canadian travelers reported using a private automobile for transportation; 23% reported using rental cars. U.S.-based rental car companies have an opportunity to appeal to self-drivers that don't want to put a lot of miles on personal vehicles or those who want to enjoy features and comfort of a newer vehicle for the long trip.



Package & Guided Travel

With one of the larger percentages of senior populations in the top ranked markets, Canada presents a unique opportunity for packaged, comfort, luxury, and guided travel packages.



Market Challenges

Exchange Rate

Canada inbound travel to the United States is extremely sensitive to the exchange rate between Canadian and U.S. dollars.

Dining & Food Costs

Comparatively, the cost of dining is more expensive in the United States than in Canada. Budget-conscious travelers may stick to lower cost dining options. In 2021, 35% of Canadian air travelers reported visiting fine dining establishments on their trip.

Shopping

With the USMCA Free Trade Agreement, geographical and cultural proximities, and comparable prices, only 72% of Canadian air travelers report plans to shop during their trip – a number significantly lower than the other top markets identified in this tool.

Accommodations

Forty-two percent of Canadian arrivals by air report the main purpose of their trip is to visit friends or family. The likelihood of these travelers staying with friends and family likely factors into why only 57% of Canadian travelers report staying in hotel/motel accommodations.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in Canada](#)
- [Canada Country Commercial Guide](#)



#3 Market Germany



In 2019, the United States was the top destination of global long-haul (outbound) travel from Germany, with a 15% market share.



Average Trip Spending

\$6,111



Median Stay (nights)

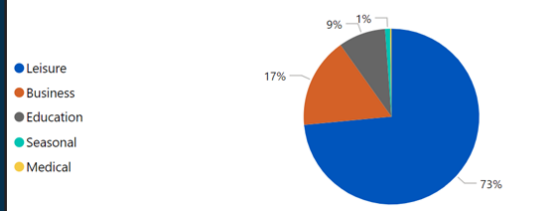
13

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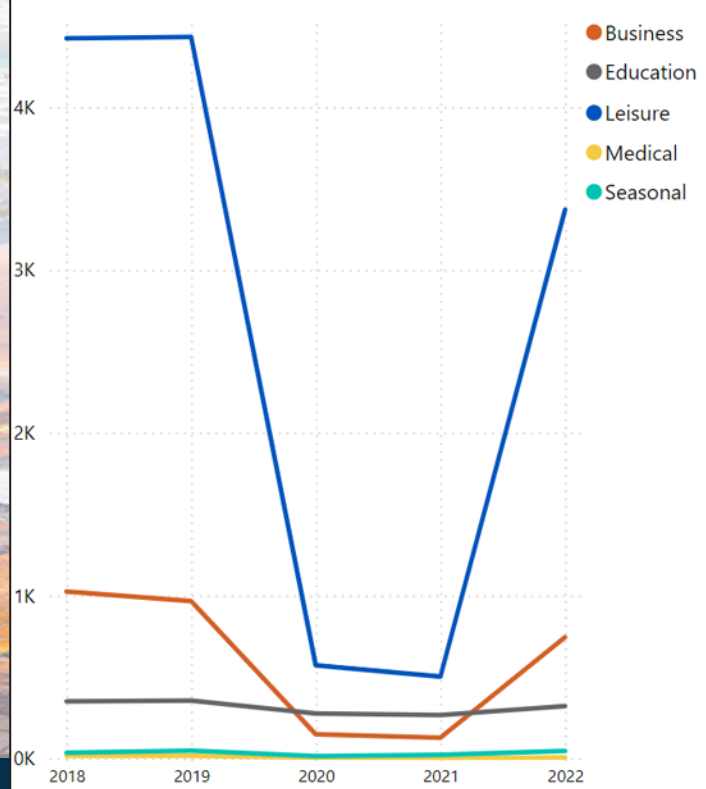
Top Indicators and Why They Are Important

Why are they traveling?



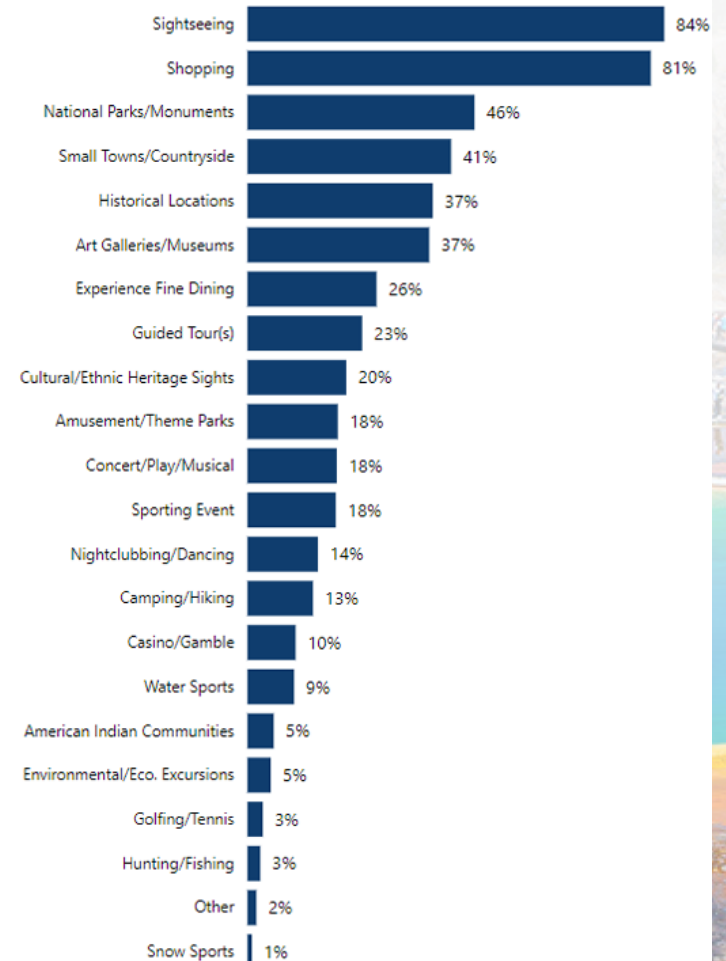
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Travel trends over time



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What are they doing?

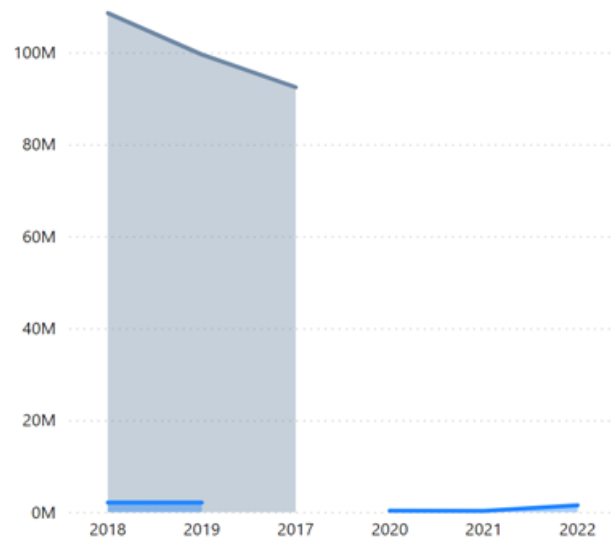


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Top Indicators and Why They Are Important (Continued)

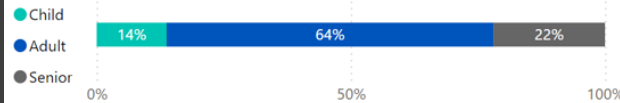
Where are they going?

● Total Int'l Travelers ● Travelers to U.S.



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

Population by age group



Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?

● Global Tourism Spending ● Spending in U.S.



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

The German economy is the fourth largest in the world and accounted for one quarter (24.7%) of the European Union's GDP in 2021. Germany is also the United States' largest European trading partner and the sixth-largest market for U.S. exports. Due to its size and close trading relationship with the United States, Germany is an important international source market for the U.S. travel and tourism industry. In fact, Germany is a top grossing export market for the United States in both personal travel as well as business travel. Moreover, the United States is the top global long-haul destination for German travelers.

Pre-pandemic (2015-2019), Germany was the fifth largest overseas source market for international visitation to the United States, behind the United Kingdom, Japan, China, and South Korea, with 5.3% of total overseas visitation (number of arrivals). During this same period, German traveler spending placed Germany as the eighth largest overseas source market for travel export dollars to the United States with 3.3% of U.S. travel exports, behind China, the United Kingdom, Japan, India, Brazil, South Korea, and Australia. In 2019, German visitation to the United States totaled 2.1 million arrivals, during which time German visitors spent USD \$7.6 billion in the United States, accounting for eight percent of total 2019 U.S. exports to Germany.

During the COVID-19 pandemic (2019-2021), German visitation to the United States declined 86% to 249,000 arrivals. In 2022, German visitation to the United States recovered to 1.5 million arrivals, or 72% of 2019's pre-pandemic levels. In 2023, German visitation to the United States totaled 1.8 million arrivals, representing an 89% recovery from 2019 pre-pandemic numbers.

Most German visitors to the United States book their travel through German tour operators and/or travel agencies to avail themselves of German consumer travel laws safeguarding their vacation investments. German visitors tend to plan and book early; however, the length of time between booking and travel has shortened considerably since the pandemic.

Germany participates in the Visa Waiver Program and the Global Entry Program. Germany also has an Open Skies Agreement with the United States.

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Top States Visited by German Travelers in 2022

State Visited	Percentage of German Travelers Visiting
New York	36%
California	24%
Florida	17%
Nevada	11%
District of Columbia	8%

	Top Motivations for Selecting Last Intercontinental Destination:	Strongest Impressions of the United States:
1.	Appeal of Local Culture	Diverse
2.	Quality of Beaches	Adventurous
3.	Natural Features	Energetic
4.	Sightseeing Opportunities	Trendy
5.	Leisure Attractions	Forward-thinking
6.	Ease of Travel	Friendly



Market Opportunities

Package Travel

On average, just over half of German travelers to the United States report using a travel agency to book travel. Most German travelers book their trips through German tour operators and/or travel agencies. This ensures the safeguarding of their travel investment through German travel package laws. Packages purchased from tour operators and agencies are frequently purchased well in advance of any trips, but the time between booking and travel has shortened considerably since the pandemic. U.S.-based travel agencies and/or U.S. companies offered packaged travel deals may find success in attracting packaged travel purchasers.



Travel on U.S. Air Carriers

In 2022, Germany touted the fifth highest amount of direct flights with the United States. With only two major airlines of their own, as opposed to 15 major U.S. airlines, German travelers are reasonably likely to fly on U.S. air carriers. That being said, there is a breadth of major European airlines and a growing number of budget airlines operate between Europe and the United States offering lower cost alternatives for budget-conscious travelers willing to endure layovers or sacrifice amenities.



Market Challenges

Business Travel

Business travel is taking more time to recover from the global pandemic given that IT tools and virtual meetings reduced the need for expensive, in-person business trips to the United States.

Regional Impacts

German consumers exhibit caution about discretionary spending on leisure travel due to concerns about the depressed economy and global instability, particularly from conflicts in Ukraine and Israel, economic recession, and the energy crisis.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in Germany](#)
- [Germany Country Commercial Guide](#)



#4 Market Mexico



Boosted by improving economic conditions and marketing campaigns to attract the Mexican traveler, Mexico will continue to be a top source of international travelers to the United States for the foreseeable future.



Average Trip Spending

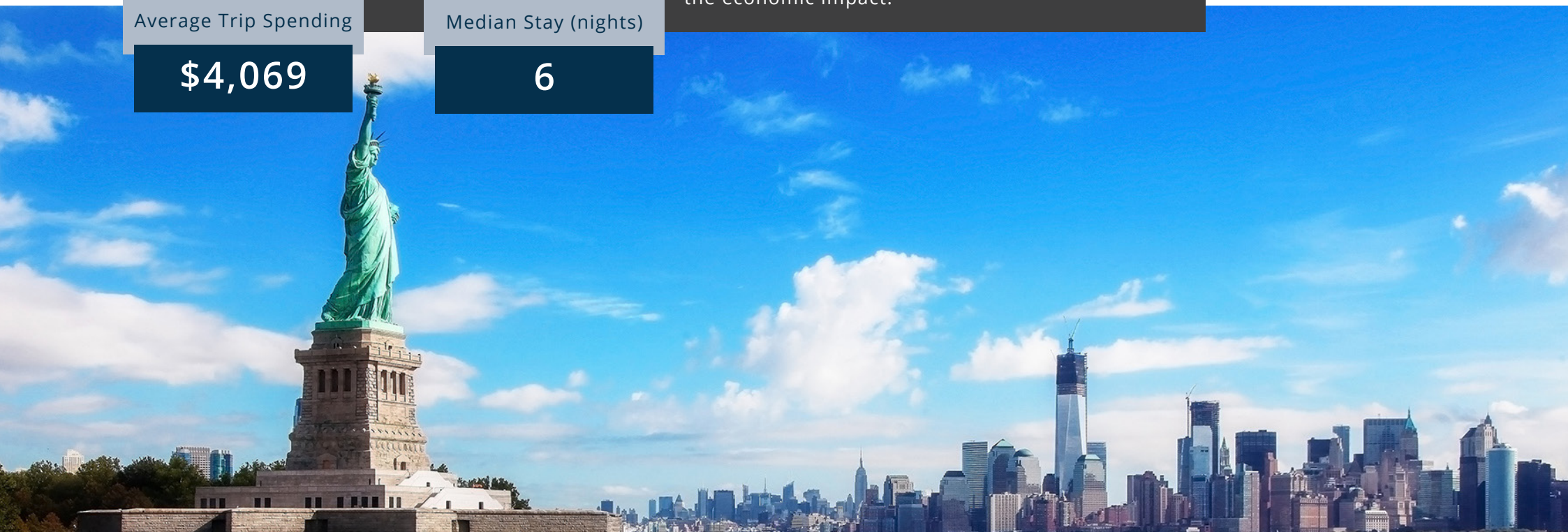
\$4,069



Median Stay (nights)

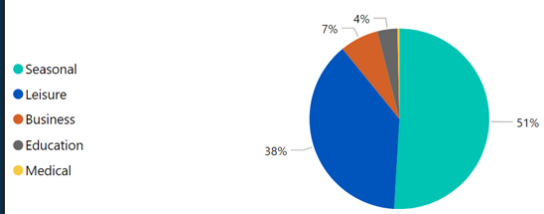
6

The average trip spending and the median stay (nights) in the U.S. are both important measures of the relative importance of a country as a source market for visitation to the U.S. The higher the average spending and longer the stay, the larger the economic impact.



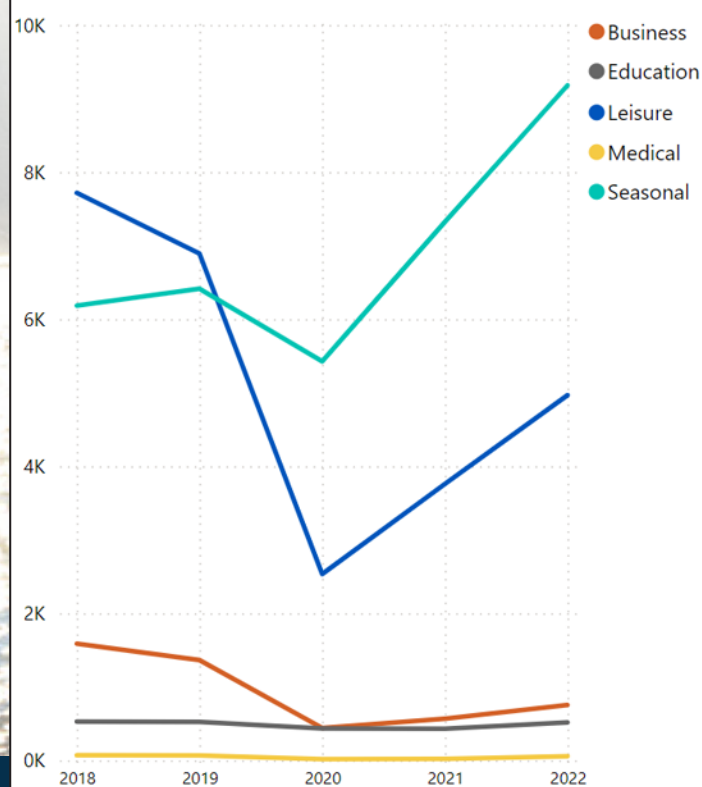
Top Indicators and Why They Are Important

Why are they traveling?



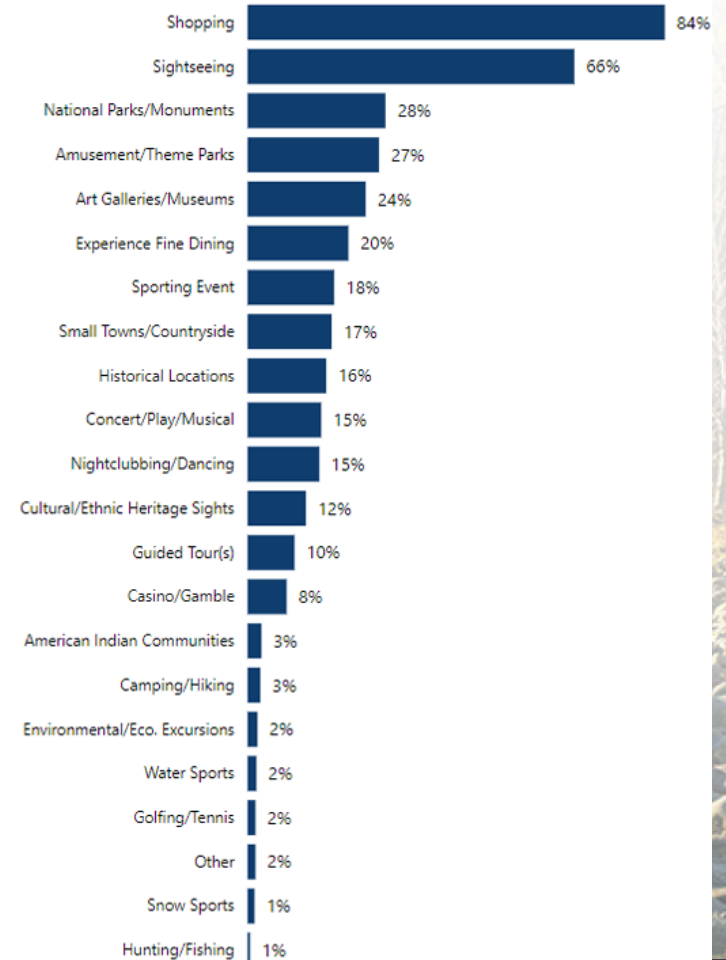
The type of travel is an important metric for understanding the source market. Different types of travelers are important to different U.S. industries.

Travel trends over time



Visitation over time provides insight on how each type of traveler to the U.S. changes over time. This is important in monitoring travel growth trends for each type of travel.

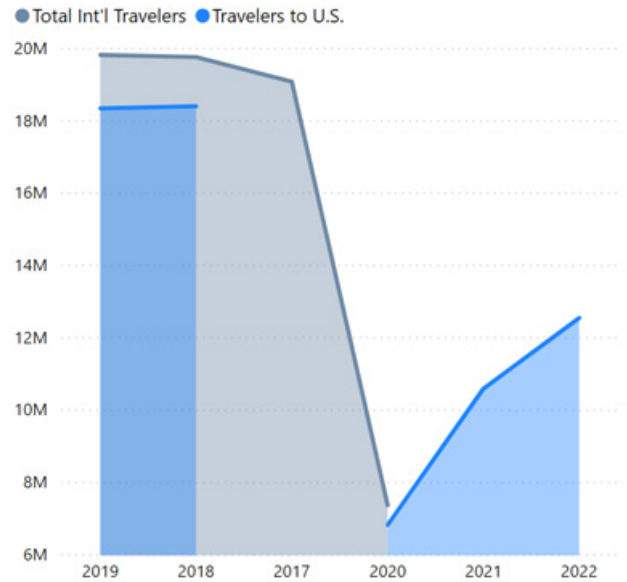
What are they doing?



The types of leisure activities international visitors engage in during their trip to the U.S. provides critical insights about how international visitors spend their time/money and where the greatest subsector opportunities may exist.

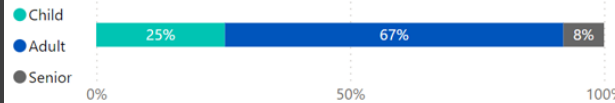
Top Indicators and Why They Are Important (Continued)

Where are they going?



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

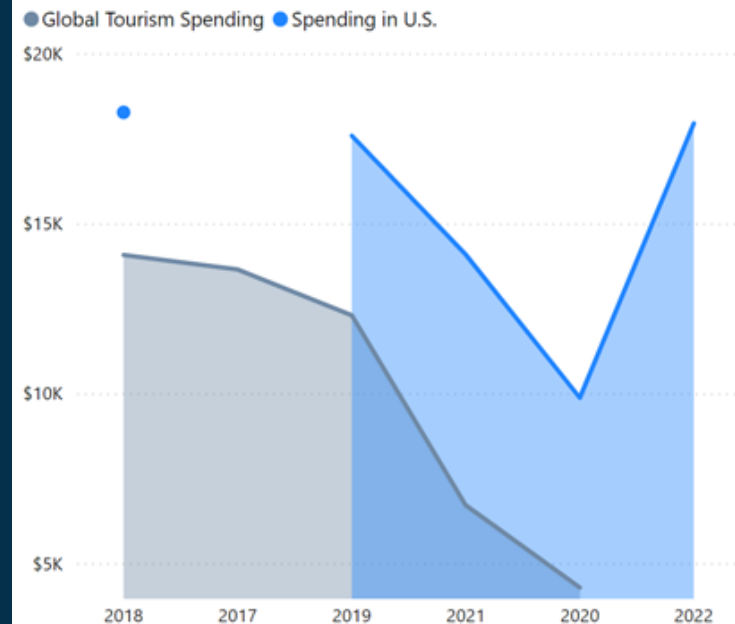
Population by age group



Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

Mexico is the 16th-largest economy in the world and second-largest economy in Latin America and has generally enjoyed slow, but stable economic growth since the 1990s. Despite global headwinds related to ongoing COVID 19-linked supply chain disruptions, inflation, and geopolitical instability, Mexico's economy is expected to continue achieving slow but steady levels of growth driven in large part by external demand. The [United States-Mexico-Canada Agreement \(USMCA\)](#), which replaced the North American Free Trade Agreement (NAFTA) on July 1, 2020, provides additional trade-related benefits for U.S. companies. In 2021 alone, two-way trade between the United States and Mexico totaled USD \$725.7 billion, positioning Mexico as the United States' second-largest trading partner. With Mexico's deep trade and investment ties, geographical proximity, close cultural, social, and economic ties with the United States, and participation in the USMCA and Global Entry program, it is no surprise that travel and tourism represents a best prospect sector for U.S. destinations attracting Mexican travelers.

Pre-pandemic (2015-2019), Mexico was the second largest source market for international visitation (number of arrivals) to the United States with 24% of visitation, behind only Canada. During this same period, Mexico was the third largest source market for travel exports (7.5%) to the United States, behind China and Canada. In 2019 alone, 18.3 million Mexicans visited the United States, commanding 82% of international outbound travel from Mexico. Those Mexican visitors spent USD \$17.6 billion in the United States, accounting for six percent of U.S. travel exports to Mexico.

In 2020, Mexican visitation to the United States declined 63% from 2019 to 10.6 million arrivals. After beginning to recover in 2021, Mexican visitation to the United States reached 12.5 million arrivals in 2022, or 68% of 2019 levels.

After an extremely difficult 2020 and 2021 for the entire global travel and tourism industry, it is expected that Mexico will continue to be a top source of international travelers, boosted by improving economic conditions, in addition to the implementation of marketing campaigns to attract the Mexican traveler.

Brand USA, the United States' destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:





Top States Visited by Mexican Travelers in 2022

State Visited	Percentage of Mexican Air Travelers Visiting
Texas	22%
California	18%
Florida	17%
New York	12%
Nevada	9%



	Top Motivations for Selecting Last Intercontinental Destination:	Strongest Impressions of the United States:
1.	Appeal of Local Culture	Diverse
2.	Natural Features	Trendy
3.	Sightseeing Opportunities	Adventurous
4.	Quality of Beaches	Open-minded
5.	Leisure Attractions	Down-to-earth
6.	Ease of Travel	Energetic
7.	-	Creative



Market Opportunities

Travel on U.S. Air Carriers

Mexico had more direct flights to the United States than any other country in the 2019-2023 period. On average, 72% of air passenger traffic was on U.S. carriers and the remaining 28% was carried on foreign airlines, indicating a U.S. air carriers will continue to see opportunities on direct flights to and from Mexico.

Packaged Travel

Mexicans are drawn to the United States because of the diversity in destinations, infrastructure, and excellent travel and tourism services. Mexicans enjoy destinations that offer shopping, gaming, entertainment, amusement parks, and a cosmopolitan environment. Mexican travelers prefer to purchase vacation packages through travel agencies, though purchasing airfare and hotel packages online has become much more common in recent years. U.S. wholesalers and tour operators are key players in the Mexican market, in part because they can negotiate directly with U.S. travel and tourism service companies and therefore offer competitive prices and packages.

Social Media Marketing

U.S. destinations and service providers are taking advantage of IT tools and virtual communication platforms to increase education on future attractions and services among potential Mexican tourists. Social media represents an important way to continue promoting U.S. destinations and services to maintain the interest of the Mexican traveler and to entice them to visit the United States.

Winter Sports

With its own robust and varied geography for outdoor enthusiasts, U.S. national parks and other outdoor destinations are typically not especially popular among Mexican travelers, with the exception of skiing. In winter months, Mexican tourists flock to winter sports resorts in Colorado, New Mexico, and Utah.





Market Challenges

Policy

Mexico is not in the Visa Waiver Program and does not have an Open Skies Agreement.

Diverse Audience

Mexico's size and the diversity that comes with it are often underestimated and adequate resources are frequently not assigned in strategies to tap this market. It can be difficult to cover this vast market with a single distributor or agent.

Business Travel

Business travel is taking more time to recover from the global pandemic given that IT tools and virtual meetings reduced the need for in-person business trips to the United States.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in Mexico](#)
- [Mexico Country Commercial Guide](#)
- [U.S. Department of State – Mexico Travel Advisory](#)



#5 Market United Kingdom



London Heathrow is the dominant U.K. airport connecting the United States and the United Kingdom, with additional direct flights to major U.S. cities originating London Gatwick, Manchester, Edinburgh, and Glasgow airports.



Average Trip Spending

\$5,186



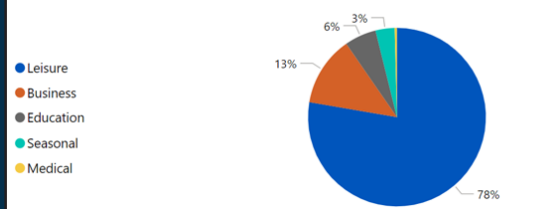
Median Stay (nights)

10

The average trip spending and the median stay (nights) in the U.S. are both important measures of the relative importance of a country as a source market for visitation to the U.S. The higher the average spending and longer the stay, the larger the economic impact.

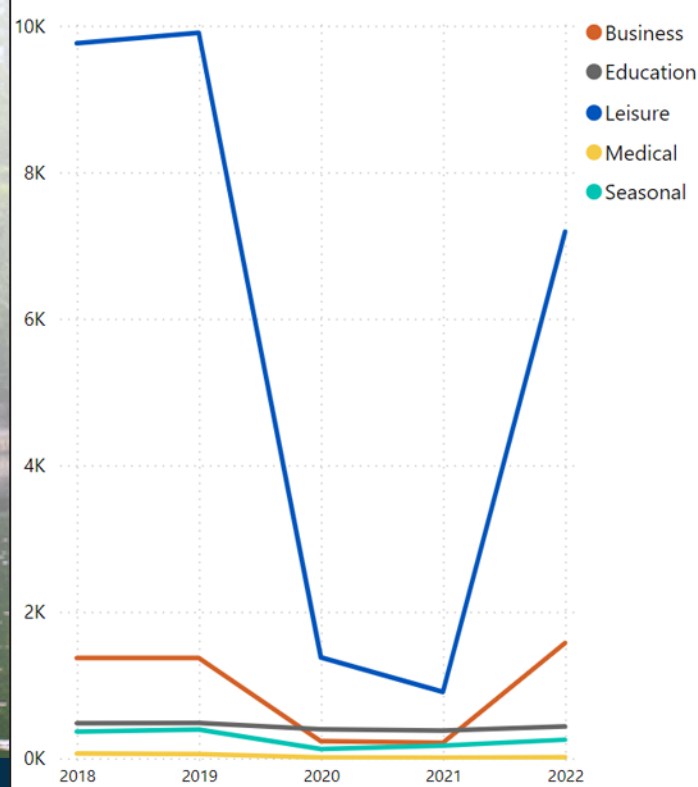
Top Indicators and Why They Are Important

Why are they traveling?



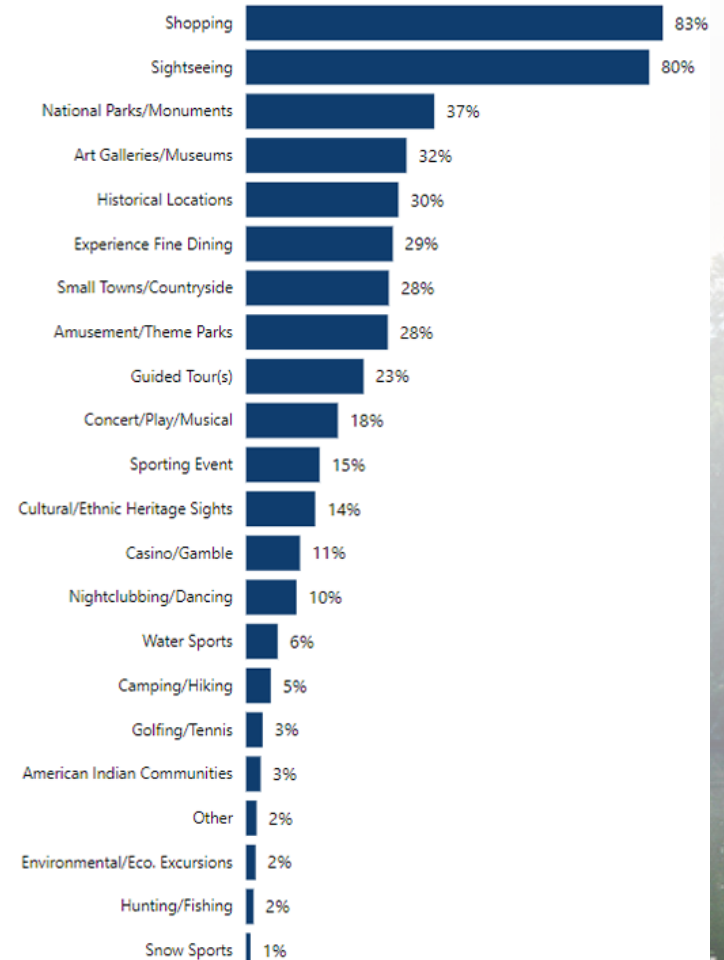
The type of travel is an important metric for understanding the source market. Different types of travelers are important to different U.S. industries.

Travel trends over time



Visitation over time provides insight on how each type of traveler to the U.S. changes over time. This is important in monitoring travel growth trends for each type of travel.

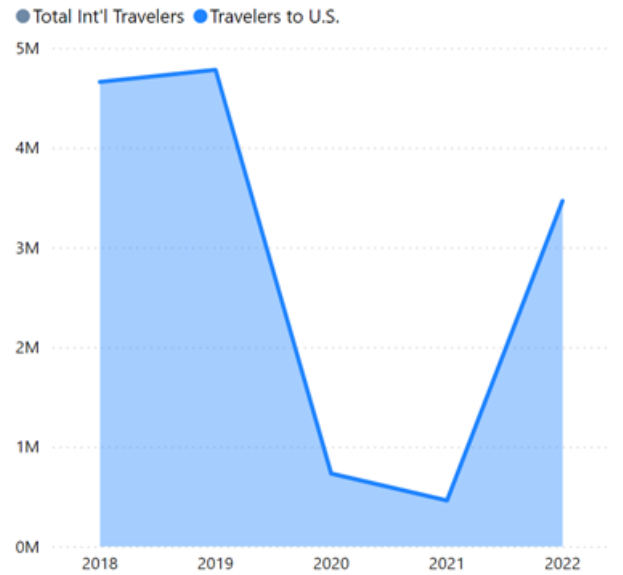
What are they doing?



The types of leisure activities international visitors engage in during their trip to the U.S. provides critical insights about how international visitors spend their time/money and where the greatest subsector opportunities may exist.

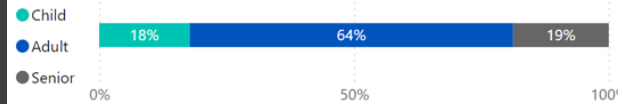
Top Indicators and Why They Are Important (Continued)

Where are they going?



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

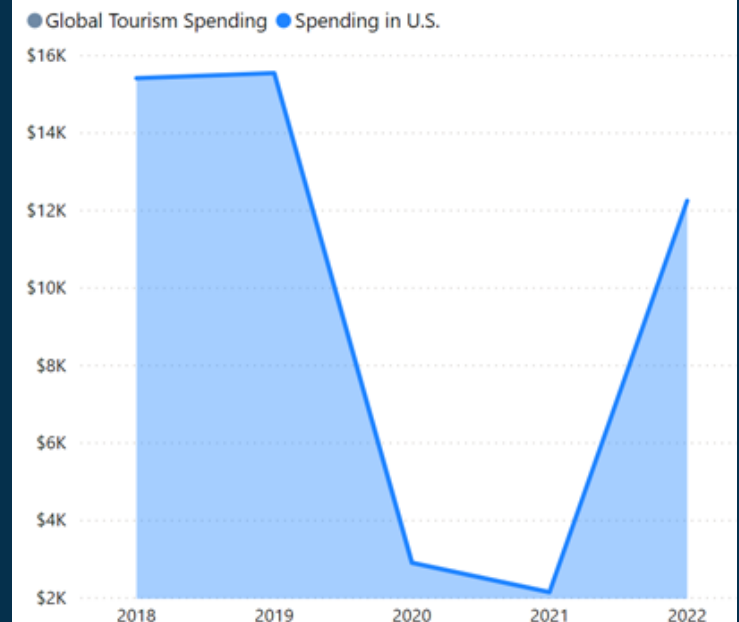
Population by age group



Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

The United Kingdom, with a population of 67 million people and a GDP of \$3.2 trillion as of 2021, is the fifth-largest economy in the world. Though geographically small (roughly the size of Oregon), it boasts the second-largest economy in Europe. Due to common language, shared history and fundamental beliefs, the United Kingdom and the United States have a special relationship which extends to travel between the two countries. Over the past 23 years of the 21st century, the United Kingdom has been the number one overseas source market of visitation to the United States in all but two years.

Despite the challenges and uncertainty posed by the United Kingdom's exit from the European Union ("Brexit"), high inflation due to increasing energy prices, and the COVID-19 pandemic, the United Kingdom remains a critical trade partner in goods, services and international visitors. In 2021, the United States exported USD \$129.3 billion in goods and services to the United Kingdom, ranking it the seventh largest export destination for U.S. goods and number one largest for U.S. services. In 2019, the United States was the top destination of global long-haul (outbound) travel from the United Kingdom, with a 21% market share. This travel is facilitated by the United Kingdom's participation in the Visa Waiver Program and the Global Entry Program. The United Kingdom also has an Open Skies Agreement with the United States.

Pre-pandemic (2015-2019), the United Kingdom was the largest overseas source market for international visitation (number of arrivals) to the United States, with 12% of overseas visitation. This number established the United Kingdom as the United States' second largest overseas source market for travel exports with 6.5% of U.S. travel exports (behind only China). In 2019 alone, 4.8 million travelers from the United Kingdom visited the United States, spending USD \$15.5 billion and accounting for 10.6% of total U.S. exports to the United Kingdom.

The COVID-19 pandemic had drastic effects on international travel, including that from the United Kingdom. From 2019 to 2021, visitation from the United Kingdom to the United States declined 90% to 461,000. These numbers are quickly recovering. In 2022, travel from the United Kingdom to the United States recovered to 3.5 million visitors, or 73% of 2019 levels. The recovery continued into 2023, when visitation from the United Kingdom to the United States totaled 3.9 million arrivals, representing 82% of 2019 numbers.



Brand USA, the United States' destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:



Top States Visited by UK Travelers in 2022

State Visited	Percentage of UK Travelers Visiting
New York	31%
Florida	29%
California	17%
Nevada	10%
Texas	4%

	Top Motivations for Selecting Last Intercontinental Destination:	Strongest Impressions of the United States:
1.	Appeal of Local Culture	Friendly
2.	Sightseeing Opportunities	Energetic
3.	Ease of Travel	Adventurous
4.	Natural Features	Diverse
5.	Quality of Beaches	Open-minded
6.	Leisure Attractions	Trendy



Market Opportunities

Adventure Tourism

A recent Visit Britain survey concluded that 40% of British tourists prefer sports and active holidays. Interest in active and nature tourism is significantly growing among millennials as well as senior travelers. When planning their trips, they are more often seeking to incorporate activities such as mountain biking and canoeing. In addition, the desire to try more adventurous activities, e.g., bungee jumping, rafting, or paragliding, is on the rise.



Market Challenges

Competition

The United Kingdom has a very mature and advanced travel and tourism industry. The sector dedicated to promoting/selling the United States as a destination is wide, varied, and well-organized. It includes airlines, tour operators, travel agencies, ground transport, accommodation, and theme parks/attraction providers. U.S. Destination Management Organization (DMO's)/Tourism Authorities are widely represented in the United Kingdom via third party representation companies. New U.S. providers looking to tap into this market may find steep competition and may have more success in working through third party representation companies.

Economic Recovery

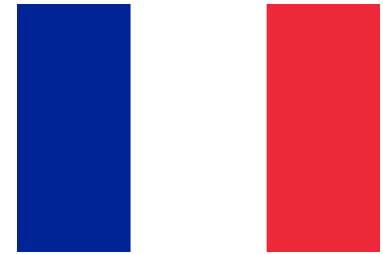
The United Kingdom formally left the European Union single market as of January 1, 2021. The combined impact of the COVID-19 and Brexit on the economy resulted in a nearly 10% decline in the United Kingdom's GDP in 2020, the largest drop among G7 countries. The United Kingdom's emergency and fiscal support protected jobs and incomes during the pandemic and, combined with a rapid vaccine rollout, allowed the United Kingdom to recover quickly, with a GDP that eventually reached pre-pandemic levels. However, the recovery has slowed as the economy continues to struggle with Brexit-related adjustments and supply shortages and rising inflation, compounded by Russia's invasion of Ukraine.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in the United Kingdom](#)
- [United Kingdom Country Commercial Guide](#)
- [Visit USA Association UK](#)

#6 Market France



The United States is one of the most popular destinations for French long-haul travelers.



Average Trip Spending

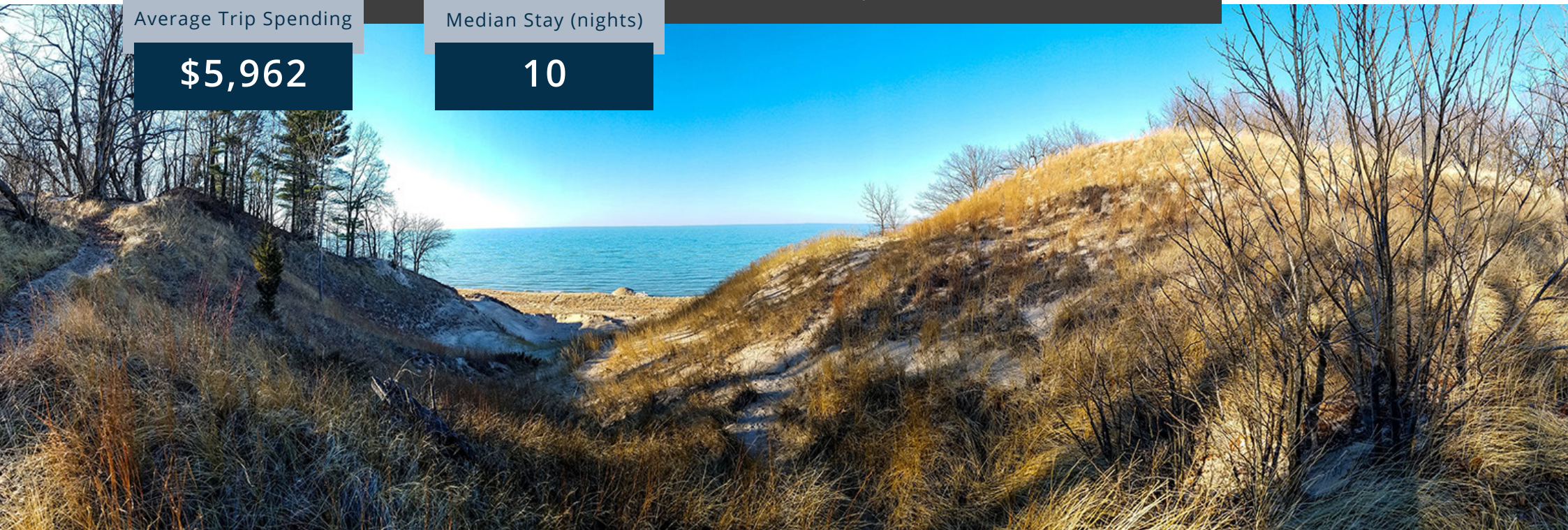
\$5,962



Median Stay (nights)

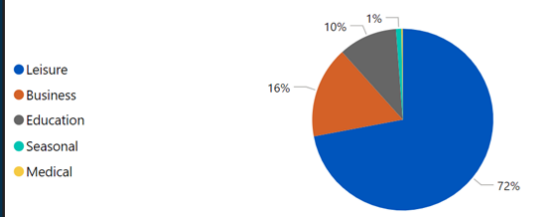
10

The average trip spending and the median stay (nights) in the U.S. are both important measures of the relative importance of a country as a source market for visitation to the U.S. The higher the average spending and longer the stay, the larger the economic impact.



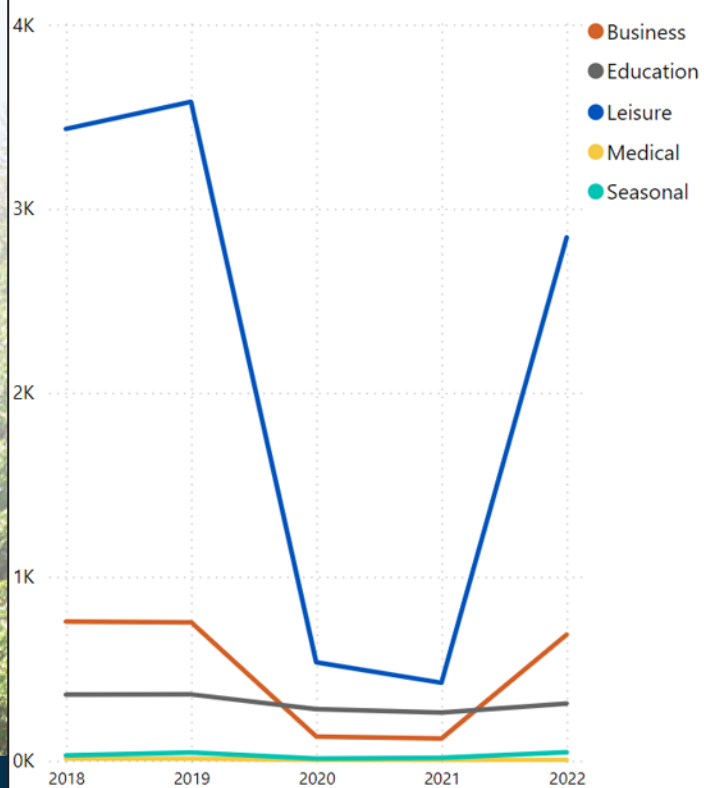
Top Indicators and Why They Are Important

Why are they traveling?



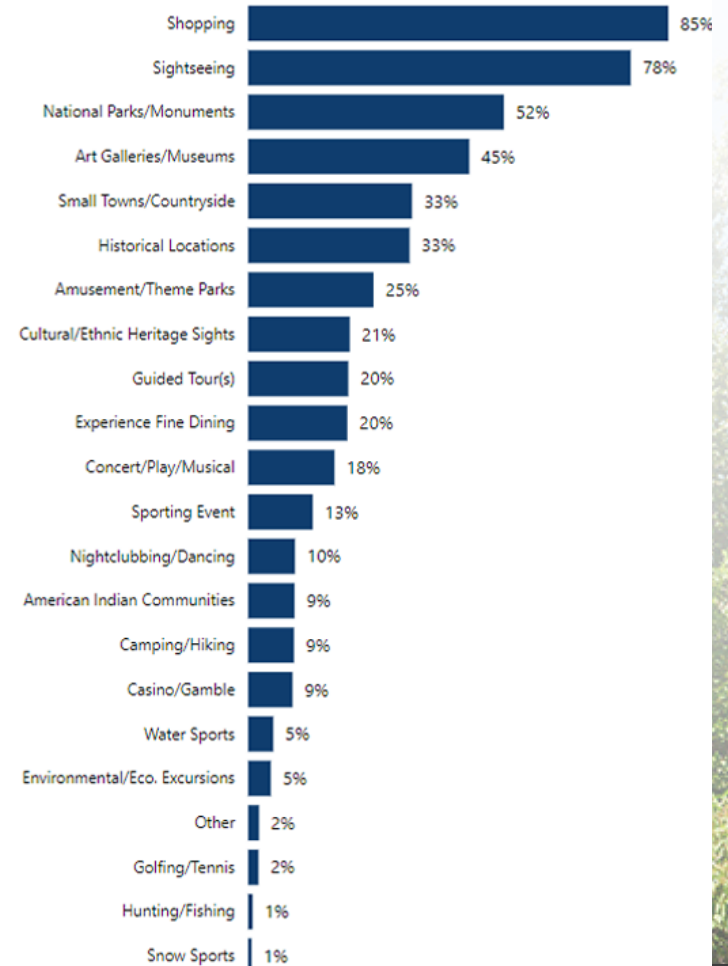
The type of travel is an important metric for understanding the source market. Different types of travelers are important to different U.S. industries.

Travel trends over time



Visitation over time provides insight on how each type of traveler to the U.S. changes over time. This is important in monitoring travel growth trends for each type of travel.

What are they doing?



The types of leisure activities international visitors engage in during their trip to the U.S. provides critical insights about how international visitors spend their time/money and where the greatest subsector opportunities may exist.

Top Indicators and Why They Are Important (Continued)

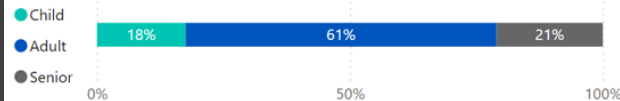
Where are they going?

● Total Int'l Travelers ● Travelers to U.S.



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

Population by age group

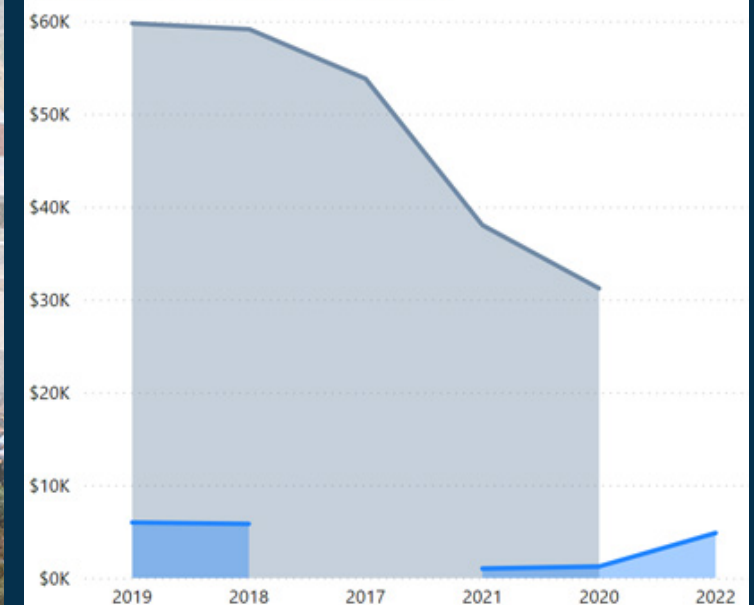


Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?

● Global Tourism Spending ● Spending in U.S.



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

The United States is a top long-haul destination for French travelers. Within the United States, French visitors flock to California, New York, and Florida. Other regional destinations such as the Southwest, Rocky Mountain states and the Deep South (Louisiana, Mississippi, Tennessee) are climbing in popularity with French travelers, particularly for repeat visitors. French tourists are also drawn to U.S. national parks, particularly those featured in classic American TV and cinema, making Arizona, Utah, Nevada, Colorado, and New Mexico popular destinations for French tourists. Similarly, many French tourists seek out cultural and historical bastions, choosing destinations renowned for their museums or famous art exhibits (New York, Washington D.C., Boston, Chicago).

Pre-pandemic (2015-2019), France was the seventh largest overseas source market for international visitation to the United States, making up 4.4% of overseas visitation. During this same period, France was the ninth largest overseas source market for travel exports (spending) to the United States, with 2.4% of U.S. travel exports. In 2019 alone, 1.8 million French visitors spent \$5.9 billion in the United States, accounting for 10% of U.S. exports to France that year. In that year, the United States was the second most popular destination of global long-haul (outbound) travel from France – behind only Morocco – with 11% of the French traveler market. France is a member of the Visa Waiver Program and has an Open Skies Agreement with the United States.

The international travel industry was devastated by the COVID-19 pandemic due to associated quarantines and travel restrictions. From 2019 to 2021, French visitation to the United States dropped 88% to 222,000 visitors. In 2022, French visitation to the United States recovered to 1.3 million, or 71% of 2019 levels. Recovery trends continued into 2023, when French visitation to the United States reached 1.6 million, or 86% of 2019 levels. U.S. Commercial Service staff on the ground in France report one of the consequences of the pandemic is that French travelers are making greater use of the services of tourism professionals. According to L'Echo Touristique, a French travel trade magazine, the United States is among the top destinations for French travelers for the summer of 2024, with a nine percent increase in bookings.



Brand USA, the United States' destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:



Top States Visited by French Travelers in 2022:

State Visited	Percentage of French Travelers Visiting
New York	48%
California	27%
Florida	15%
Nevada	12%
Arizona	6%



	Top Motivations for Selecting Last Intercontinental Destination:	Strongest Impressions of the United States:
1.	Natural Features	Diverse, Adventurous
2.	Appeal of Local Culture	Open-minded
3.	Sightseeing Options	Trendy
4.	Quality of Beaches	Friendly
5.	Ease of Travel	Forward-thinking
6.	Leisure Attractions	Energetic



Market Opportunities

Extended Stay Travel

The French have five weeks of paid vacation per year. The average length of stay in the United States is approximately two weeks.

Rental Cars

The French are very individualistic in their travel behavior, visiting a wide variety of U.S. destinations and attractions. With personalized itineraries, strong English-language proficiency, and cultural comfort, 70% of French visitors embrace a “Fly and Drive” approach to visiting the United States.

Luxury/Comfort Travel Packages

Some French travelers, mainly senior travelers, prefer the convenience of organized trips.

Travel on U.S. Air Carriers

With only two major airlines of their own (Air France and KLM), as opposed to 15 major U.S. airlines, French travelers are reasonably likely to fly on foreign air carriers, particularly those offering direct flights. Of the nine carriers offer non-stop flights from France to the United States, four are U.S. carriers (American Airlines, Delta Air Lines, JetBlue and United), four are French (Air France, Air Tahiti Nui, French Bee, and La Compagnie), and one is Norwegian (Norse Atlantic Airways). As travel and tourism is returning to pre-pandemic levels, several airlines introduced new non-stop flights from the United States to France in 2023: JetBlue with New York and Boston to Paris, American Airlines with Philadelphia to Nice, and Norse Atlantic Airways with Los Angeles to Paris. That being said, the collective breadth of major European airlines and a growing number of budget airlines operate between Europe and the United States offering lower cost alternatives for budget-conscious travelers willing to endure layovers or sacrifice amenities.



Market Challenges

Policy

France does not participate in the Global Entry Program and does not have a Free Trade Agreement with the United States.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in France](#)
- [France Country Commercial Guide](#)

[Visit USA Committee France](#) - The Visit USA organizes a wide range of promotional actions: travel trade and consumer fairs, workshops, e-learning programs for travel agents, Media Awards ceremony, video clips, contests, and newsletters.

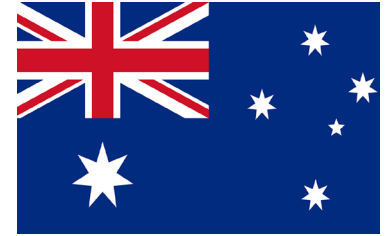
Contact: Delphine Aubert, General Manager, at d.aubert@office-tourisme-usa.com

Brand USA Representation in France - Brand USA organizes a wide range of promotional events: webinars, partnerships with French tour operations, sporting events (NBA), 4th of July cocktail reception for the French travel industry.

Contact: William Mondello, Marketing Manager, at wmondello@thebrandusa.com



#7 Market Australia



Australians have a great propensity for travel and are entitled to four weeks paid annual vacation. As such, Australians visiting the United States travel farther, stay longer, and spend more than travelers from many other markets.



Average Trip Spending

\$10,341



Median Stay (nights)

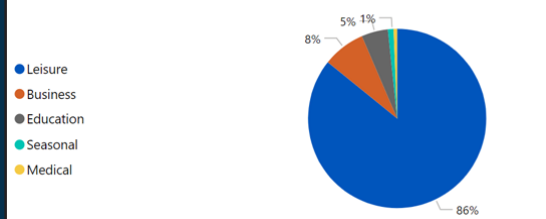
14

The average trip spending and the median stay (nights) in the U.S. are both important measures of the relative importance of a country as a source market for visitation to the U.S. The higher the average spending and longer the stay, the larger the economic impact.



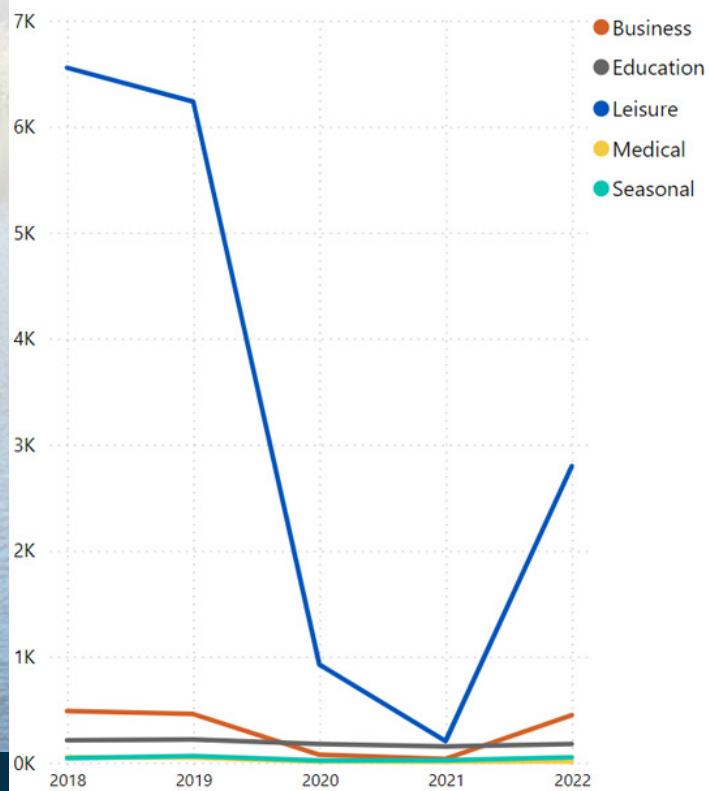
Top Indicators and Why They Are Important

Why are they traveling?



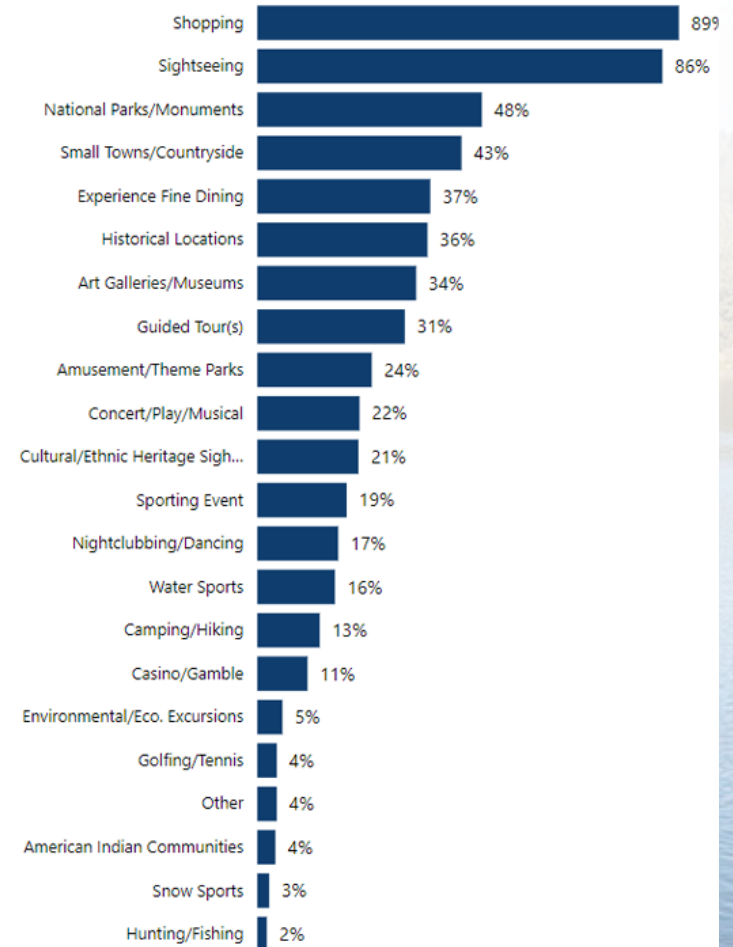
The type of travel is an important metric for understanding the source market. Different types of travelers are important to different U.S. industries.

Travel trends over time



Visitation over time provides insight on how each type of traveler to the U.S. changes over time. This is important in monitoring travel growth trends for each type of travel.

What are they doing?

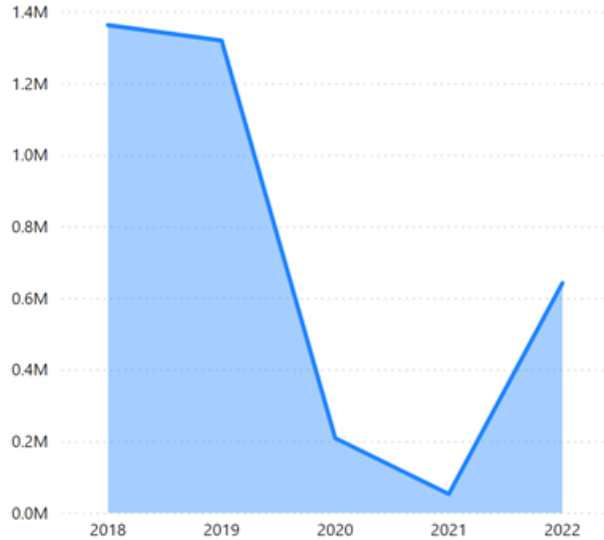


The types of leisure activities international visitors engage in during their trip to the U.S. provides critical insights about how international visitors spend their time/money and where the greatest subsector opportunities may exist.

Top Indicators and Why They Are Important (Continued)

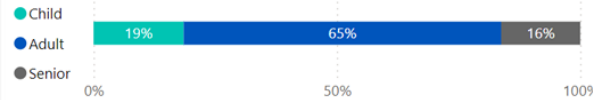
Where are they going?

● Total Int'l Travelers ● Travelers to U.S.



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

Population by age group

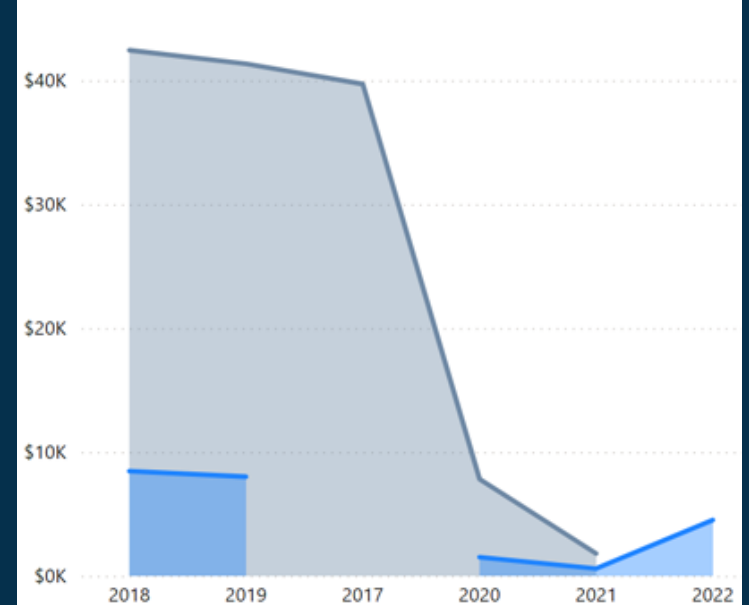


Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?

● Global Tourism Spending ● Spending in U.S.



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.

Brand USA, the United States' destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:



Top States Visited by Australian Travelers in 2022

State Visited	Percentage of Australian Travelers Visiting
California	39%
Hawaii	29%
New York	19%
Florida	12%
Nevada	10%

	Top Motivations for Selecting Last Intercontinental Destination:	Strongest Impressions of the United States:
1.	Natural Features	Adventurous
2.	Sightseeing Opportunities	Friendly
3.	Appeal of Local Culture	Diverse
4.	Leisure Attractions	Open-minded
5.	Quality of Beaches	Trendy
6.	Ease of Travel	Fresh





Market Overview

With few barriers to entry, a familiar legal and corporate framework, sophisticated consumer and industrial sectors, and a straightforward, English-speaking business culture, Australia remains an important and receptive market for American goods and services. Moreover, the Australia–U.S. Free Trade Agreement (AUSFTA) has significantly stimulated U.S.-Australian trade and investment since its entry into force in 2005. These same factors support a robust travel exchange between the two countries. Airlines flying between Australia and the United States include Air New Zealand, American, Delta, Hawaiian, Jetstar, Qantas, and United. There are direct flights between Sydney, Melbourne and Brisbane, and Dallas Fort Worth, Honolulu, Houston, Los Angeles and San Francisco. Australia participates in the Visa Waiver Program and the Global Entry Program and has an Open Skies Agreement with the United States.

Pre-pandemic (2015-2019), Australian visitors to the United States made up 3.5% of all international visitation, making Australia the eighth largest overseas source market for international visitation. During this same period, Australia was the seventh largest overseas source market for travel exports (spending) to the United States, with 3.7% of U.S. travel exports. In 2019 alone, 1.3 million Australian visitors spent \$8 billion in the United States, accounting for 16.7% of U.S. exports to Australia and ranking Australia as the eleventh-largest market for inbound visitors. Also in 2019, the United States was the top destination of global long-haul (outbound) travel from Australia, with a 15% market share.

Due to effects from the COVID-19 pandemic, Australian visitation to the United States declined 96% to 52,100 from 2019 to 2021. In 2022, Australian visitation to the United States recovered to 643,000, or 49% of 2019 levels. The post pandemic recovery pact increased in 2023, when Australian visitation to the United States reached 954,000, or 72% of 2019 levels.

Australians have a great propensity for travel and are entitled to four weeks paid annual vacation, allowing them to travel farther, stay longer, and thus spend more than visitors from many other markets. Ninety-one percent of Australian visitors to the United States are travelling for pleasure – as opposed to business, medical, or education travel motivations – and 75% are repeat travelers to the United States. Australians visit the United States throughout the year, with significant peaks in travel between April and October and in December and January.





Market Opportunities

Extended Stay Travel

Australians visiting the United States stay longer (average stay of 18 nights) and spend more than visitors from many other markets. However, Australians are also more likely to visit multiple destinations within the United States during each visit. This offers an opportunity for hotel chains to offer multiple location packages.

Rental Cars

With longer stays and more destinations covered, over 33% of Australian travelers rent a car.

Travel Packages

Australian travel agents and tour operators are an important source of information and a key channel for making bookings. Consumer media, including digital and social media, are influential in stimulating interest and major local newspapers and special interest magazines regularly publish travel articles on the United States.



Market Challenges

Distance

Australia's distant location from the United States is often cited as the single most significant barrier to U.S. visitation, both in terms of price and duration of long flights. Australia enjoys ready access to Asian and other low-cost travel destinations and air carriers.

Exchange Rate Fluctuations

Exchange rate fluctuations can impact travel to the United States.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in Australia](#)
- [Australia Country Commercial Guide](#)



#8 Market Ireland



Ireland has the highest per capita travel to the United States (share of visitors by population size) of all European countries and the third highest globally, second only to Canada and Mexico.



Average Trip Spending

\$6,308



Median Stay (nights)

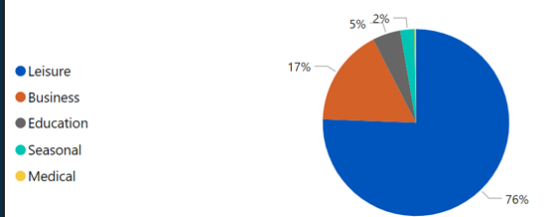
8

The average trip spending and the median stay (nights) in the U.S. are both important measures of the relative importance of a country as a source market for visitation to the U.S. The higher the average spending and longer the stay, the larger the economic impact.



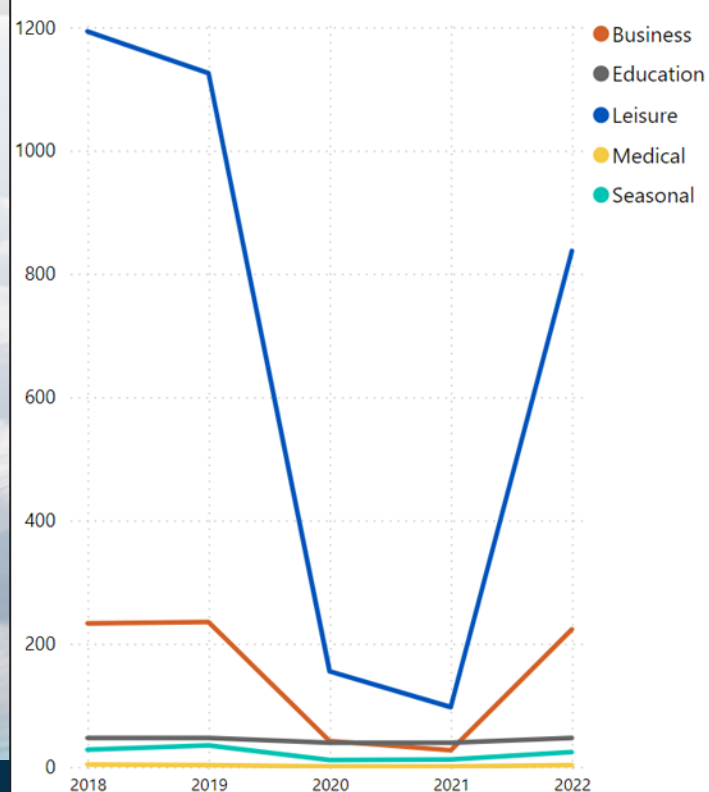
Top Indicators and Why They Are Important

Why are they traveling?



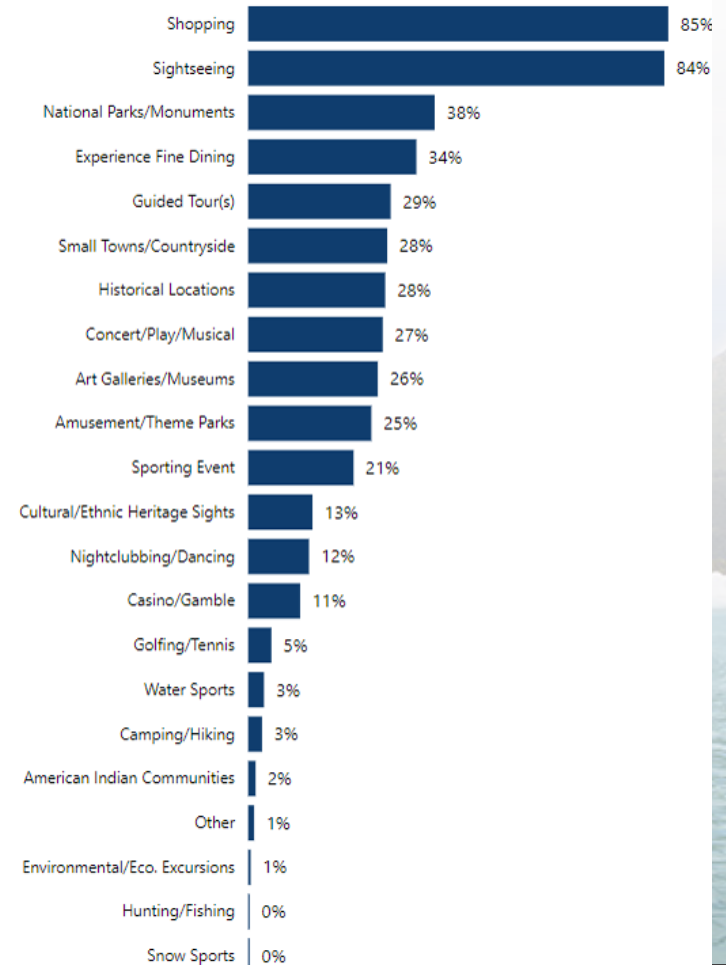
The type of travel is an important metric for understanding the source market. Different types of travelers are important to different U.S. industries.

Travel trends over time



Visitation over time provides insight on how each type of traveler to the U.S. changes over time. This is important in monitoring travel growth trends for each type of travel.

What are they doing?

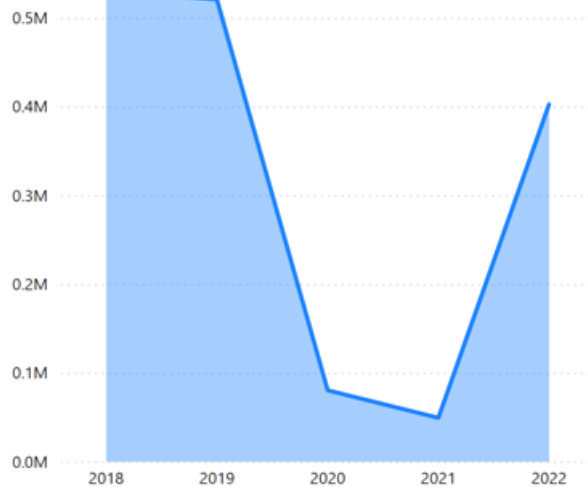


The types of leisure activities international visitors engage in during their trip to the U.S. provides critical insights about how international visitors spend their time/money and where the greatest subsector opportunities may exist.

Top Indicators and Why They Are Important (Continued)

Where are they going?

● Total Int'l Travelers ● Travelers to U.S.



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

Population by age group

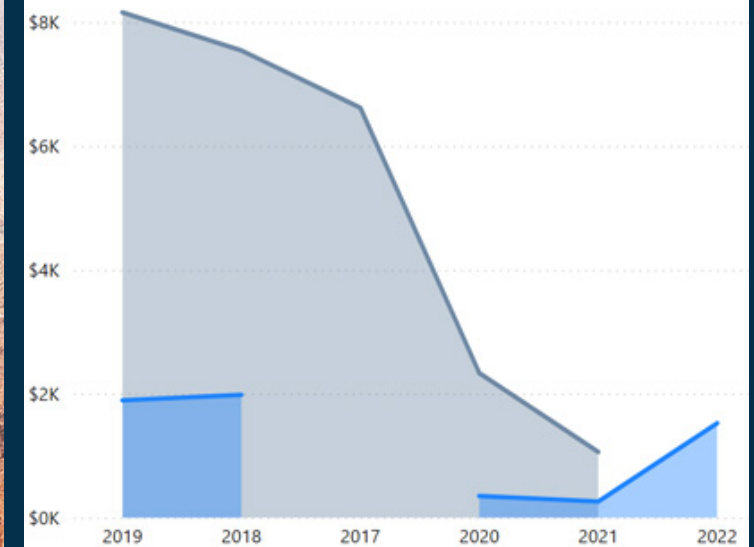


Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?

● Global Tourism Spending ● Spending in U.S.



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

The United States and Ireland enjoy a close cultural affinity and longstanding political, economic, and commercial relations that set the stage for a healthy travel and tourism exchange. The U.S.-Ireland commercial relationship, which exceeds \$1 trillion, is significant by international standards and is particularly impressive considering Ireland's relatively small population of five million people. Ireland's GDP grew by 12.2% in 2022, making it the best performing economy in Europe. With a GDP per capita of \$103,983, higher than that of the United States, the United Kingdom, or European Union national average, Ireland is a wealthy country with wealthy, travel-ready citizens.

Pre-pandemic (2015-2019), Ireland was the seventeenth largest overseas source market for international visitation to the United States, making up 1.2% of overseas visitation. During this same period, Ireland was the twenty-third largest overseas source market for travel exports to the United States (dollars spent by visitors), with 0.8% of U.S. travel exports. In 2019 alone, Irish visitation (number of arrivals) to the United States totaled 521,000 visitors who spent USD \$1.9 billion in the United States, accounting for 2.6% of overall U.S. exports to Ireland.

The impact of the COVID-19 pandemic reduced Irish visitation to the United States 91% during the pandemic years (2020-2021), but by 2022, Irish visitation to the United States recovered significantly, bringing the number up to 403,000 Irish visitors 77% of 2019 levels.

Ireland has the highest per capita travel (visitor arrivals to the United States as a percentage of the population) to the United States of all European countries and is the third highest globally, second only to Canada and Mexico. Prior to 2020, over half a million Irish citizens, or 11% of Ireland's population, travelled to the United States. In 2019, Ireland was the fifteenth largest overseas source market of visitation (number of arrivals) to the United States and ranked eighth from Europe in terms of U.S. travel exports.

Long-haul air travel from Ireland to the United States is recovered from pandemic disruptions and continues expanding to new highs. During the peak summer travel season, 18 U.S. destination cities are served with direct flights from Ireland, with Dublin and Shannon operating daily transatlantic flights. Additionally, Ireland is a member of the Visa Waiver Program, shares in an Open Skies Agreement, and participates in the Preclearance Program with the United States.



Brand USA, the United States’ destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:



Top States Visited by Irish Travelers in 2022

State Visited	Percentage of Irish Travelers Visiting
New York	48%
Florida	14%
California	13%
Nevada	7%
Illinois	7%



Market Opportunities

Travel on U.S. Air Carriers

Ireland is the only country in Europe – and one of only two countries outside of Canada and the Caribbean – with U.S. preclearance at both Dublin and Shannon airports. Preclearance allows U.S.-bound passengers to clear all U.S entry controls such as immigration, customs, and agriculture prior to departure, so travelers face no further entry controls upon arrival. The convenience of preclearance encourages travelers from all over Europe to travel via Ireland to the United States. Those traveling from or through Ireland to take advantage of the preclearance program are reasonably likely fly on U.S. air carriers. Forecasts show that the Irish transatlantic travel market is expected to continue to grow, fueled by an increase in seat capacity, the opening of new direct routes, and expected economic growth. Through the peak summer travel season, direct routes operate to 18 U.S. cities: Atlanta, Boston, Charlotte, Chicago, Cleveland, Dallas, Denver, Hartford, Los Angeles, Minneapolis - St. Paul, Miami, New York, Newark, Orlando, Philadelphia, San Francisco, Seattle and Washington, DC via Dublin and Shannon airports. Irish travelers spent \$448 billion flying internationally on U.S. flagged carriers in 2019.

Business Travel

Fifty-five percent of Irish visitors to the United States come for vacation/leisure purposes, followed by visiting friends/relatives (21.6%) and business travel (20.8%) in 2019. Ireland is the ninth largest source of foreign direct investment (FDI) in the United States. As Irish companies expand their footprint stateside, more employees are traveling and/or relocating around U.S. offices. In addition to their travel while on work visas, this phenomenon also brings a new generation of family and friends to the United States – many for the first time – to visit the foreign workers.



Market Challenges

Brexit

As a small, open economy, Ireland is vulnerable to geopolitical and global economic pressures. The full economic impact of Brexit and the ongoing discussions on the future trading relationship between the European Union and the United Kingdom is still being assessed. Global tax reform will likely impact some business decisions, but Ireland's position as an exporting nation and a destination for inward investment remains strong.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in Ireland](#)
- [Ireland Country Commercial Guide](#)



#9 Market India



From 2014 to 2019, the fastest growing destinations for Indian outbound travel were Thailand, the United Arab Emirates, the United States, Kuwait, and Singapore. Together, these accounted for 42% of the increase in Indian international travel.



Average Trip Spending

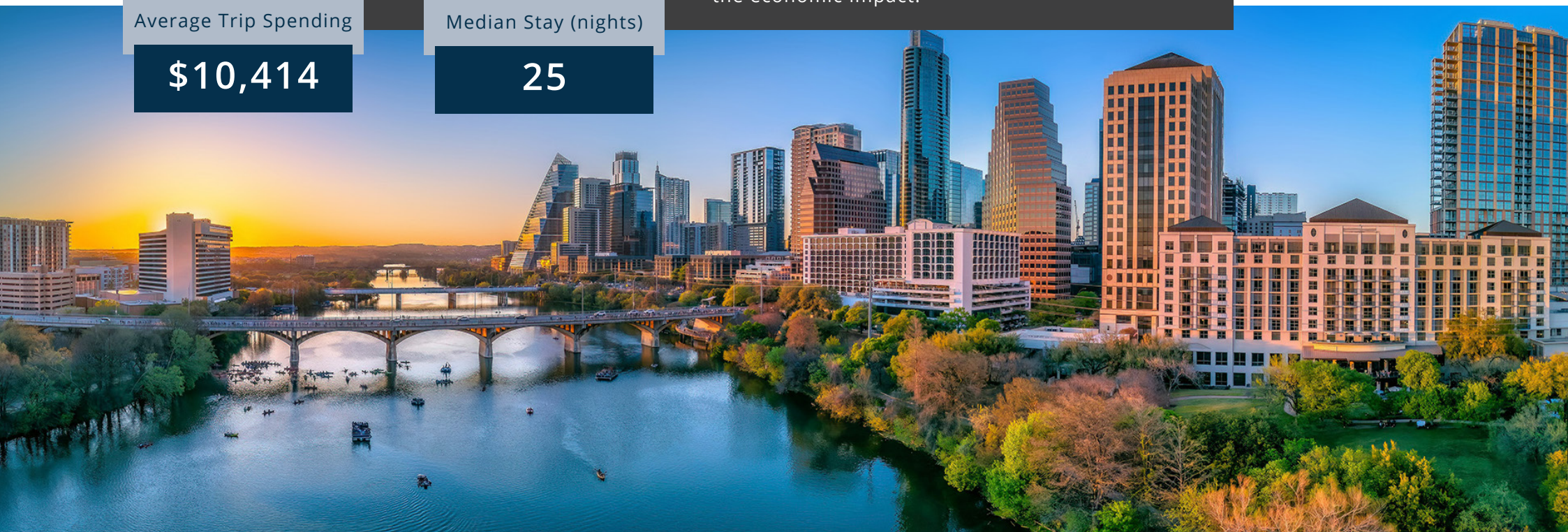
\$10,414



Median Stay (nights)

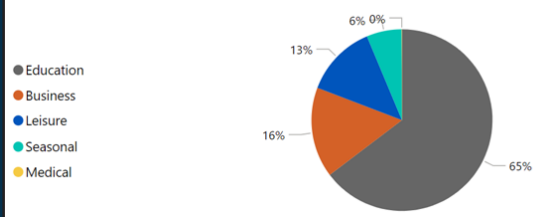
25

The average trip spending and the median stay (nights) in the U.S. are both important measures of the relative importance of a country as a source market for visitation to the U.S. The higher the average spending and longer the stay, the larger the economic impact.



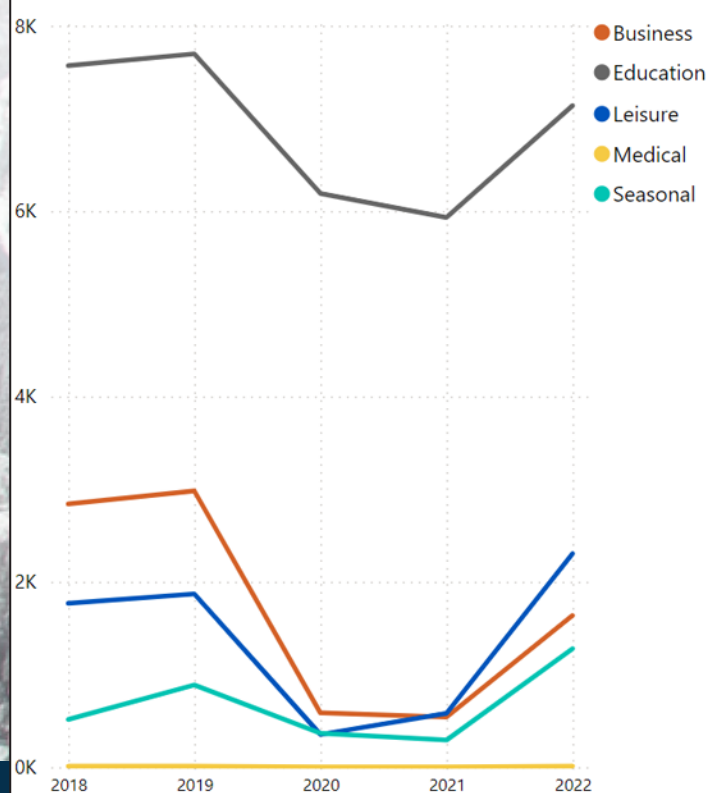
Top Indicators and Why They Are Important

Why are they traveling?



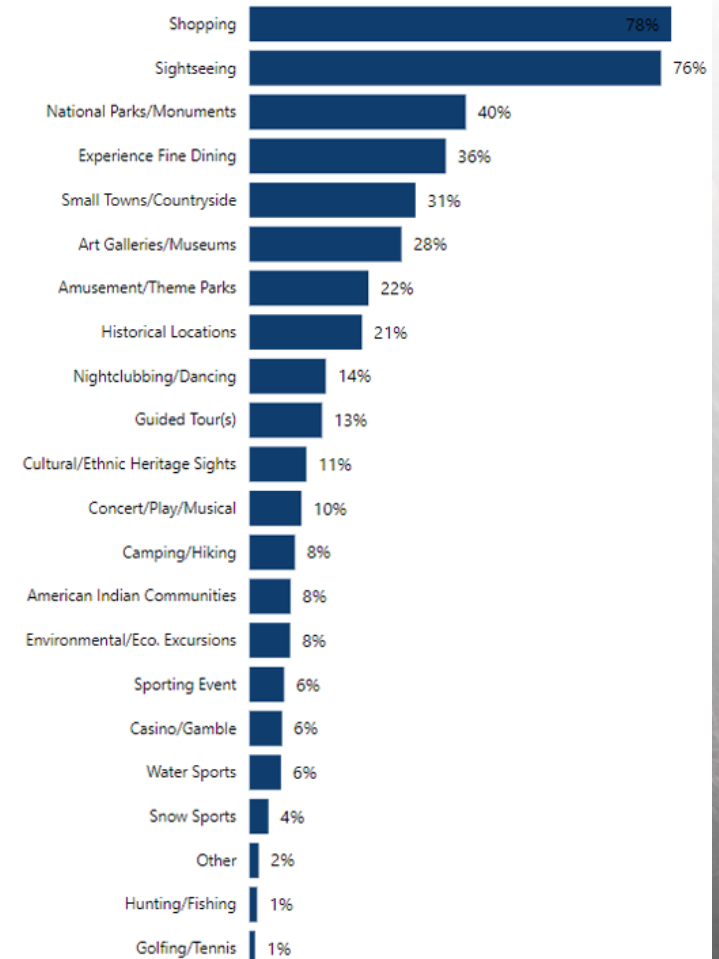
The type of travel is an important metric for understanding the source market. Different types of travelers are important to different U.S. industries.

Travel trends over time



Visitation over time provides insight on how each type of traveler to the U.S. changes over time. This is important in monitoring travel growth trends for each type of travel.

What are they doing?

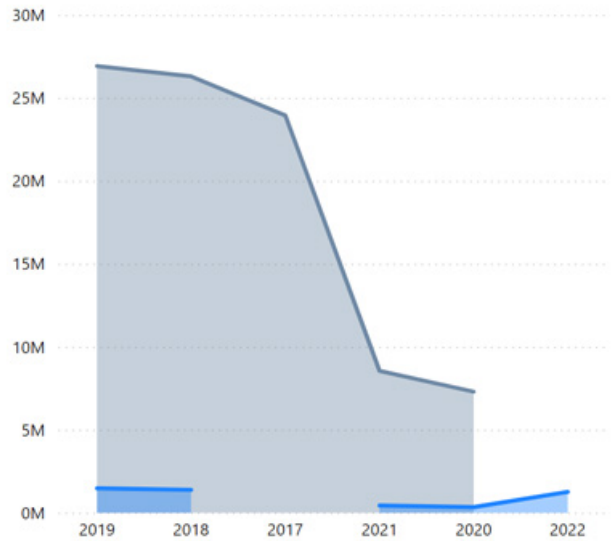


The types of leisure activities international visitors engage in during their trip to the U.S. provides critical insights about how international visitors spend their time/money and where the greatest subsector opportunities may exist.

Top Indicators and Why They Are Important (Continued)

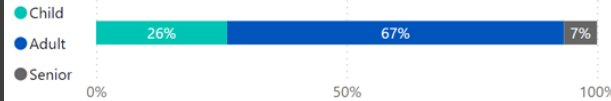
Where are they going?

● Total Int'l Travelers ● Travelers to U.S.



Comparing a country's visitation to the U.S. versus a country's global outbound travel provides a measurement of how competitive the United States is as a destination for that source market.

Population by age group

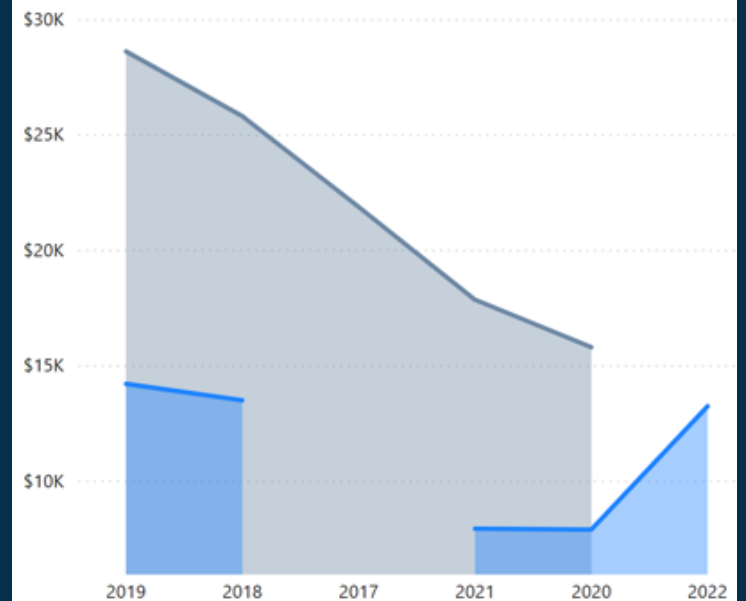


Population demographics provide information about what type of activities visitors are likely to participate in.

Comparing a country's visitor spending in the U.S. versus a country's global visitor spending provides a measurement of how competitive the United States is as a destination for that source market.

What are they spending?

● Global Tourism Spending ● Spending in U.S.



Exchange rate stability index



The volatility of the exchange rate impacts the reliability of the purchasing power of the visitor from a particular source market. The higher stability, the more reliable the purchasing power.



Market Overview

While the COVID-19 pandemic affected economies around the globe, the effects on the Indian economy have been less devastating than for many other countries. After India's GDP declined by six percent in 2020, Indian GDP grew to nine percent in 2021. India is set to be the fastest growing economy in the G20 grouping of large nations. India is the world's fifth largest economy with a GDP of \$3.4 trillion and is expected to surpass Germany and Japan by the early 2030s to become the world's third largest economy. India's economy grew close to seven percent in 2023 and economists predict India's GDP growth rate to be in the 6.5%-7% range in fiscal year 2023-24. Bi-lateral trade in goods and services between the United States and India exceeded \$191 billion last year, nearly doubling in less than a decade.

International travel from India to the United States – bolstered by robust economic growth, a large and increasingly affluent middle class, the increased availability of air transportation, and strong ties between the two countries – is on the rise. In a traveler survey conducted by Brand USA, the United States' destination marketing organization, Indian travelers cited beaches and seaside attractions, shopping, urban attractions, local lifestyle experiences, and ecotourism and nature as the top five motivations they had for selecting their last intercontinental travel destination. Survey respondents also chose the following as the strongest impressions they had of the United States: friendly, open-minded, fresh, creative, and trendy. From 2014 to 2019, the destinations with the largest growth by volume for Indian outbound travel were Thailand, the United Arab Emirates (UAE), the United States, Kuwait, Singapore, and Bangladesh.

Pre-pandemic (2015-2019), India was the ninth largest overseas (excluding Canada and Mexico) source market for international visitation to the United States, with 3.3% of overseas visitation. During this same period, India was the fourth largest overseas source market for travel exports to the United States, with 5.4% of U.S. travel exports. In 2019 alone, Indian 1.5 million Indian visitors spent \$14.2 billion in the United States, accounting for 24.5% of overall U.S. exports to India. That same year, the United States was the second largest destination of global long-haul (outbound) travel from India, behind only the UAE, with a 11% market share.

International travel slowed considerably during COVID-19 pandemic. From 2019 to 2020, Indian visitation to the United States declined 77% to 336,000 arrivals. Fortunately, recovery has been swift. In 2022, Indian visitation to the United States recovered to 1,257,000 arrivals, or 85% of 2019 levels.



Brand USA, the United States’ destination marketing organization, compiles comprehensive information for top overseas markets. Below you will find the latest market insights from this key market regarding motivations and impressions of the United States:



Top States Visited by Indian Travelers in 2022

State Visited	Percentage of Indian Travelers Visiting
New York	27%
California	26%
Illinois	14%
Texas	11%
Florida	11%



Market Opportunities

Repeat Travelers Seeking New Experiences

Among Indian travelers who currently have a U.S. visa, a high number are repeat travelers to the United States, with second- and third-time travelers seeking new destinations and experiences. The U.S. Commercial Service team in India has noted an increase in demand among Indian travelers for unique experiences when they visit the United States. Many travel agents indicate that their clients have already visited the best-known attractions in the United States and now seek new experiences when visiting the country. These include sports and adventure packages, food and cultural festivals, and niche market activities. Destinations that have not traditionally drawn large numbers of Indian travelers may find success in catering to the growing number of travelers seeking new experiences.

Meeting, Incentive Travel, Conferences, and Exhibitions (MICE)

India is poised to be the world’s fastest growing outbound MICE tourism market, expected to exceed \$45 billion by 2025.

Education Spending

Of the over one million foreign students studying in the United States, one in five are Indian. India has been number two in U.S. education exports since 2010. In 2022 alone, international students from India contributed over USD \$7.1 billion to the U.S. economy, and 24% of the overall international student population was Indian. There are 268,000 students from India studying in the United States, marking a 35% increase over the previous year. With an increasing number of students choosing the United States as their study destination, direct and indirect destination tourism in the form of student and family travel is expected to see continued growth.

Niche and Luxury Travel

One of the key segments being targeted by destinations and tourism stakeholders as they look at India for revival of tourism is luxury travel. In 2021, pleasure travelers accounted for nearly 52% of total Indian travelers to the United States, which is higher than the category of student travel. Many of these travelers are high-net-worth individuals whose preference appears to be wellness resorts and villa staycations in the most stunning and exclusive locations. Data shows that the average Indian visitor to the United States spends \$5,200, among the highest of all international visitors. Additional interest is also building in niche tourism sectors such as medical, wellness, and adventure tourism.



Market Challenges

Visas

While there are currently long wait times for obtaining a first time B1/B2 visa, the U.S. Embassy and Consulates have taken several steps to streamline the visa application process and reduce wait times for Indian travelers. Initiatives such as the interview waiver program and the Global Entry Program have been implemented to facilitate smoother travel for eligible individuals. In addition, there are currently over three million Indians who have a valid 10-year U.S. visa and constitute a major share of repeat travelers.



Learn More

- [National Travel and Tourism Office](#)
- [Contact your Local U.S. Commercial Service Office](#)
- [U.S. Commercial Service in India](#)
- [India Country Commercial Guide](#)

Our Methodology

Learn about the methodology ITA’s international trade and industry experts used to calculate the travel and tourism export opportunities.

International Trade Administration (ITA) staff assessed 15 indicators (i.e., explanatory variables for predicting U.S. travel export success by country) that inform the quality of key international travel and tourism source markets in terms of predicted U.S. exports for inclusion in the Travel and Tourism Top Export Market Ranking algorithm.

Market Indicators

Indicator	Description	Data Source
Exchange Rate Stability	Evaluates the consistency and reliability of a country’s currency exchange rate against the U.S. dollar. Exchange rates with high variability are less appealing to travelers, as they increase uncertainty over how much the trip will cost them in their local currency.	The World Bank 2023 Official exchange rate (LCU per US\$, period average) License: CC BY-NC 4.0
GDP	GDP is a measure of overall economy size and therefore the market size, including clean tech.	The World Bank 2023 GDP (Current US\$) License: CC BY-NC 4.0
GDP per Capita and GDP per Capita Growth	GDP per capita measures market development and individual wealth, which are indicative of overall opportunity, including in clean tech. GDP per capita growth indicates whether personal wealth is increasing, and citizens enjoying higher GDP per capita growth rates will be in a better position for discretionary spending.	The World Bank 2023 GDP per capita (Current US\$) License: CC BY-NC 4.0
Population	Population tells us how much opportunity there is for travel based on how many people are in the country.	The World Bank 2023 Population, total - World License: CC BY-NC 4.0

Trade History Indicators

Indicator	Description	Data Source
Inbound Tourism Spending and Inbound Spending Growth	Inbound travel exports trade data (spending).	International Trade Administration <i>Inbound Tourism Expenditures</i> License: Proprietary
Inbound Tourism Arrivals and Inbound Arrivals Growth	Inbound travel exports trade data (volume).	International Trade Administration <i>Inbound Tourism Volume</i> License: Proprietary
Outbound Tourism Departures	This metric shows what nations are the major sources of international travel (volume) in the world.	United Nations World Tourism Organization Outbound Travel Departures Permissions: Data reused with permission of the UNWTO
Outbound Tourism Spending	This metric shows what nations are the major sources of international travel (spending) in the world.	United Nations World Tourism Organization Outbound Travel Expenditures Permissions: Data reused with permission of the UNWTO



Access Indicators

Indicator	Description	Data Source
Direct Flights	The number of direct international scheduled airline flights from a country facilitates international travel from that country to the United States signals the airline industry's expectation of size of international passenger travel to the United States.	International Trade Administration <i>Flights by U.S. citizens</i> License: Proprietary
English Language Proficiency	Language suggests how travelers will be able to communicate during their visit. Low English language proficiency may increase likelihood that travelers use travel agents, group travel with translators, and/or stick major cities. Greater proficiency with English language allows travelers increased access to a wider variety of destinations and experiences, therefore increasing draw of the United States as a destination overall.	University of Ottawa, JuriGlobe Alphabetical index of political entities, languages and corresponding legal systems Copyright © University of Ottawa, the Faculty of Law (Civil law section) Education First English Proficiency Index Copyright © Signum International AG 2023
Population Weighted Distance	The further away from the United States, the longer and more expensive it is for travelers to come to the United States.	United States International Trade Commission Dynamic Gravity Dataset License: CC BY-NC 4.0
Visa Waiver Program Participation	The Visa Waiver Program enables most citizens or nationals of participating countries to travel to the United States for tourism or business for stays of 90 days or less without obtaining a visa.	United States Department of State: Bureau of Consular Affairs Visa Waiver Program License: CC BY-NC 4.0

Additional Data

Find additional exporting tips and tricks, export market research, export assistance, and other related resources for travel and tourism.

Visualization	Data Source
U.S. Air Traveler (Arrivals) Survey	U.S. Customs and Border Protection <i>ADIS/I-94 Visitor Arrivals Program</i> License: Proprietary

