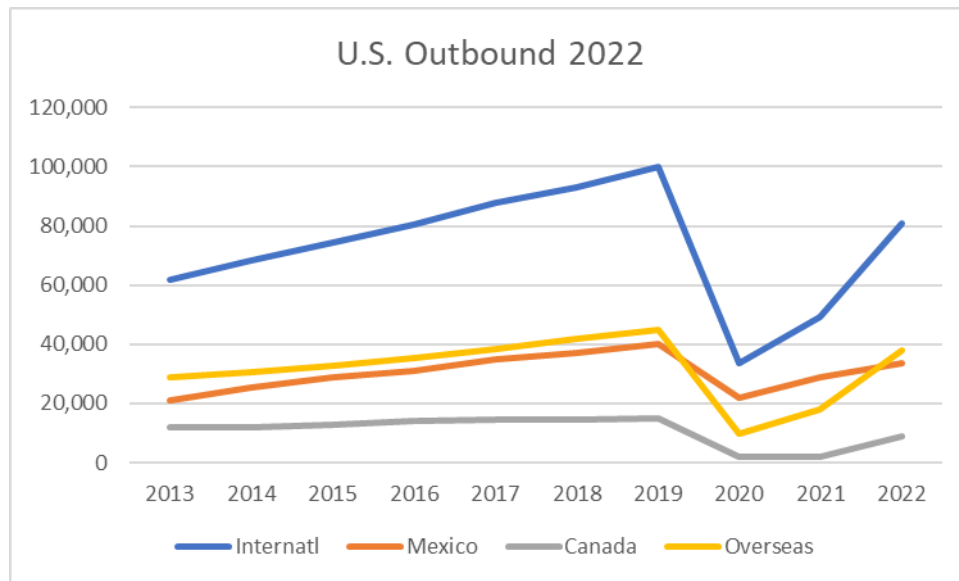


Management Analysis of 2022 U.S. Resident Outbound Travel

September 19, 2023

WASHINGTON - The U.S. Department of Commerce announced that in 2022:

U.S. Resident Travel to International Destinations Increased 64% From 2021 and reached 81% of its 2019 Pre-pandemic Record Level.



Total U.S. outbound travel rebounded to 80.7 million travelers in 2022, up 64% over 2021 and nearly 81% of the record U.S. outbound travel in 2019 when it reached 99.7 million. U.S. outbound travel had increased every year from 2012-2019, only to decline dramatically during the pandemic to 33.5 million travelers, a 67% decline over the record set in 2019. In 2021, the U.S. saw a rebound to 49.1 million travelers going abroad, a 47% increase over 2020.

Mexico, singly the largest outbound market (33.540 million), increased 17% from 2021 and attained 84% of its 2019 result. According to Banco de Mexico/INEGI 20.8 M Americans were ‘**Tourists**’ who visited the ‘interior’ of Mexico whereas 12.7 M spent 1+ nights in the Border Zone. Tourist visitation increased 41% yoy and 13% compared to 2019. **Border 1+** travelers were down over 6% yoy and down over 39% compared to 2019. Consequently, the decline in Border 1+ visitation had a dampening effect on net U.S. outbound travel to Mexico.

Of the ‘Tourist’ travel, 12,890 M Americans traveled by air to Mexican destinations as follows: Cancun 4.924 M, Mexico City 1.701 M, Los Cabos Area 1,598 M, and Puerto Vallarta 967,000.

Canada, with a significant but smaller base (9.0 9 million), increased by 334% yoy, but had only achieved 61% of its 2019 level. About 37% of Americans visiting Canadian 2022 traveled by air. Major air destinations were Ontario 1.371 M (Toronto 1.145 M, Ottawa 105,000), British Columbia 884,000 (Vancouver 759,000); Quebec 677,000 (Montreal 593,000); Alberta 498,000 (Calgary 298,000). Over 70% of U.S. air travelers stayed in Canada for 4+ nights.

Overseas countries (38.101 million) increased 109% yoy, more than doubling 2021, and reached 85% of its 2019 base, eclipsing Mexico for the first time since 2019.

The growth in U.S. **overseas** travel was driven by **Europe**, the number one overseas world region destination. 15.4 million U.S. residents visited Europe in 2022 more than triple the volume in 2021.

Among top world region destinations in 2022, Europe was followed by:

- the **Caribbean** (8.0 million), up 20% yoy, yet -19% compared to 2019,
- **Asia** (5.0 million), up 346% yoy, but still down 37% vs 2019
- **South America** (3.2 million), up 95% yoy and up 2% vs 2019

Also of note: Travel to the **Middle East** (2.5 million) was 12% above 2019.

Top Overseas Countries Visited by U.S. Travelers in 2022

In general, U.S. travelers visited 1.2 countries, up from 1.1 countries yoy, and visited 1.8 destinations, up from 1.5 destinations yoy.

Ten of the top 20 countries visited were **European** and all but one increased by ‘triple digits’ yoy.

- The **United Kingdom** (3.7 million) was the #1 overseas country destination in 2022, a 400% increase rising from 4th place in 2021.
- **France** (3.1 million) was #2 overseas country destination, a 334% increase contributing to its rise from 7th place in 2021.
- **Italy** (2.6 million) was #4, up 318% from 9th place.
- **Germany and Spain** (each at 2.0 million), tied for 5th place, up 246% and 270%, respectively, from 10th and 11th places.
- **Greece and the Netherlands** (each at 991,000), tied for 11th place, up 92% and 318%, respectively, from 20th place in 2021.
- **Portugal** (953,000) was 13th, up by 375% from 26th place.
- **Ireland** (876,000) was 15th, up by 337% also from 26th place.
- **Switzerland** (800,000) was 17th, up by 279% and at 26th place,

Four of the top 20 countries were **Caribbean** destinations:

- **Dominican Republic** (2.7 million) was the #3 overseas country destination for 2022, however it experienced a 3.6% decrease, falling from 1st place in 2021.
- **Jamaica** (1.9 million) was #7, up 48%, still falling from 2nd place.
- **Bahamas** (1.0 million) #10, up 41%, falling from 6th place.
- **Aruba** (686,000) #18, down -35%, falling from 7th place in 2021.

Asia

- **India** (1.6 million), #8, up 230% yoy, from 13th place.
- **Philippines** (838,000), #16, up 1051% rising from 55th place.

- Note: U.S. travel to **China** was negligible (38,000) compared to 2019 (1,58 million). **South Korea** (610,000) and **Japan** (572,000), increased 318% and 572% yoy, respectively, however are still significantly below pre-pandemic levels.

South America

- **Colombia** (1.2 million), #9, up 58%, from 4th place in 2021.
- Travel to **Peru** (533,000), **Ecuador** (495,000) and **Brazil** (457,000) increased yoy.

Also, travel to: **Costa Rica** / Central America (953,000) ranked #13; to Middle Eastern countries **Turkey** (686,000) and **Israel** (648,000) ranked 18 and 20, respectively. Israel grew by 295% and raised from 32nd place in 2021.

Top States of Residence for U.S. Travelers to Overseas Destinations:

The 'top 20' U.S. states account for 87% of all outbound travel to overseas destinations.

- #1 California (5.4 million) up 20% yoy, up from #2
- #2 New York (5.1 million) up 18% yoy, up from #3
- #3 Florida (4.5 million) down 30% yoy, down from #1
- #4 Texas (2.9 million) down 4% yoy, up from #5
- #5 New Jersey (2.5 million) down 23% yoy, down from #4.

There was some shifting in state of origin rankings for U.S. resident travel in 2022 yoy, but basically 19 of the 20 remained the same. Minnesota joined the top 20.

Top Cities of residence for US travel to overseas destinations in 2022:

New York City remains the top outbound origin market (12.0%) in 2022, up from 11.3% in 2021, but down from 11.9% in 2019.

Los Angeles (4.8%) surpassed Miami (4.3%) for the number two spot in 2022.

Miami briefly held the number two spot in 2021 with a 5.9% share compared to Los Angeles at 4.7% that year.

Washington DC and Dallas were tied in 2022 with a 3.2% share. DC's share was unchanged from the previous year whereas Dallas grew from only a 2.3% share in 2021.

Chicago was slightly ahead of Dallas in 2021 with a 2.5% share, but only increased to a 3.1% share in 2022 to assume the sixth spot for origin markets.

Traveler Characteristics Trends and Shifts in 2022

- **Purpose of Trip** (The SIAT captures up to seven possible trip purposes and allows for multiple purposes per trip. The most frequently indicated purposes by respondents were:
 - Business travel 9%
 - Convention/Conference/Trade Show 3%
 - Vacation/Holiday 67%
 - Visit Friends or Relatives (VFR) 44%
 - Education 5%, Religious Pilgrimage 2%, Health Treatment 2%

- **Travel Party Size** – Average party size increased to 1.58 persons close to the 2019 average. However, almost 64% of travelers traveled alone, above the 60% average in 2019.
- **Pre-paid Packages** – Almost 8% of U.S. residents used pre-paid inclusive tour packages like 2021 and 2020, but below 10.5% reported for 2019.
- **Length of Stay** – The average number of traveler nights outside the U.S. increased, rising from 15.29 nights in 2019 to 17.92 nights in 2022.

	# Travelers	% Change	# Nights/Trav.	# Nights Total	% Change
2022	38.101 M	- 15%	17.92	682.769 M	-0.3%
2019	44.808 M		15.29	684.218 M	

Therefore, although the volume of outbound travelers overseas was down 15% compared to 2019, the extended number of nights in overseas destinations was up and basically flat compared to 2019.

- **Spending** – Total spending outside the U.S. per visitor (\$1,783.00 USD) increased 16% yoy and the average international airfare (\$1,141.00 USD) increased 28% yoy. Note: this airfare metric is a blend between U.S. carriers and foreign carrier fares.
- **Lodging** – the proportion of travelers with hotel accommodations increased slightly in 2022 to 56%. However, hotel stays are still significantly below the 64% reported in 2019.

Demographics

- **Income** – Both the mean and median income of U.S. visitors increased in 2022 yoy. The average income increased to almost \$148,000.00 from \$130,000.00 (2018 – 2021)
- **Ethnicity** – Hispanic 23.0%; non-Hispanic 77.0%
- **Race** – American Indian/Alaskan Native 1.8%; Asian 18.0%; Hawaiian Islander 1.0%; Black 12.7%; White 70.4%.
- **Gender** – Female 54.7% (average age 43.8 years); Male 45.3% (average age 45.1 years)

Other Salient Travel Characteristics

- **Trip Planning**- started 102 days prior to departure, up from the shortened planning time (81 – 84 days) during covid. Pre-covid average was an average 110 days.
- **Booking air trips** – Almost 54% booked directly with the airline. This was up from 43% in 2019.
- **First Visit** – the growth of first-time international travel was 7% up from 5.5% in 2019.
- **Activities** – Sightseeing and shopping always top the list, however there was growth in all top ten sectors with notable growth in visiting historical locations and art galleries/museums.
- **Visit Health Care Provider** – The number of respondents visiting a health care provider to receive a vaccination or medication for the trip more than doubled from 2019 to 2022 (24.6%)
- **Travel Insurance** – those purchasing trip insurance increased to 34.5%.

To review U.S. **Spending** abroad ('Imports') please go to:
<https://www.trade.gov/travel-and-tourism-research> / Spending and Balance of Payments

For more detail, please visit the on-line Monitor which contains data from 2012 -2022
<https://www.trade.gov/data-visualization/siat-outbound-survey-monitor>

In addition, the source National reports (Excel) are posted on the NTTO website:
<https://www.trade.gov/survey-international-air-travelers-results>

Also, please note that NTTO is beginning to release SIAT data/reports on a **quarterly basis**.

If the information needed is not on the website, custom table and reports are available, see:
<https://www.trade.gov/survey-international-air-travelers-results> / Custom Reports, Tables, Files

For additional information or questions, please contact:

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