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PREFACE

The U.S. Department of Commerce is proud to release the 2003 edition of the Overseas Travelers to the USA. This program, which was started in 1983, reflects 20 years of changes that have been tracked by this program. The program itself has changed dramatically over the years, and we have plans to further improve it with the help of the travel and tourism industry.

One of the mandated responsibilities of the U.S. Department of Commerce, International Trade Administration (ITA), Trade Development, Office of Travel and Tourism Industries (OTTI), this country's national tourism office, is to develop, collect and report on the necessary statistical and market research on international travel to facilitate and guide planning in the public and private sectors. The Office of Travel and Tourism Industries opened in April 1996 when USTTA was closed. This report is the result of a survey program that was developed to carry out some of the responsibilities subsequently moved to OTTI.

The statistical data collected reflect the most comprehensive survey of overseas visitors to the United States ever conducted. The data also fill many informational voids concerning market characteristics and travel patterns. In designing the tabular formats for the report, every effort has been made to include as many important market segments as possible. If the data in this report do not meet your needs, customized analysis can be developed for an additional fee.

This report covers the travel of overseas residents to the United States. A separate companion report to this publication provides survey results based on the responses of United States residents to overseas countries. Other reports, both annual and quarterly, are available on visitors from specific countries. The series of quarterly publications began in the fourth quarter of 1982. For information on the survey methodology and guidance on how to understand the data, see the sections titled "Survey Background" and "Appendix A."

Sincere thanks are due to the American and overseas international air carriers voluntarily participating in this important program, the U.S. Department of Commerce, Bureau of Economic Analysis, and the many public and private sector personnel whose dedication and hard work have ensured the successful outcome of this report and database. Finally, the efforts of CIC Research of San Diego, California, in program development and operations, are greatly appreciated.

Users of this document are cordially invited to comment on its content and usefulness. Such comments should be directed to the U.S. Department of Commerce, International Trade Administration, Trade Development, Office of Travel and Tourism Industries, Washington, D.C. 20230; Phone: (202) 482-0140, fax: (202) 482-2887. Website: http://tinet.ita.doc.gov.

Douglas B. Baker Deputy Assistant Secretary Service Industries, Tourism and Finance

GENERAL SURVEY INFORMATION

Introduction and Background

- 2003 Summary of International Travelers to the United States (Revised). This report is based on the DHS I-94 form. This database provides the only estimate of the number of non-resident travelers to the U.S. The I94 data is used to expand OTTI's Survey of International Air Travelers data to represent all non-resident overseas visitors to the U.S.
- 2003 U.S. International Air Travel Statistics Report. This
 report is based on the DHS 492 form. This database
 provides the only estimate of the number of U.S. resident
 travelers who travel abroad. The I92 data is used to
 expand OTTI's Survey of International Air Travelers data
 to represent all U.S. resident air travelers to overseas and
 Mexico.

Historical reports similar to those listed above are available from 1983 through 2003 (including reports on air travel to and from Canada for 1993-1995).

For more information on these reports, please contact OTTI at (202) 482-0140 or fax (202) 482-2887 or visit OTTI website at http://tinet.ita.doc.gov

Customized Reports

OTTI recognizes that some parties may have information needs that are not published in any of the above reports. These needs may relate to information on a specific population (e.g. business travelers from Asia) or to specific questions not published in the standard reports. In most cases, custom reports can be obtained to accommodate those information requirements. For price information and specifics related to custom reports, call OTTI at (202) 482-0140.

Questionnaire Content

A copy of the questionnaire can be found in Appendix B, at the back of this report. It contains twenty-nine multi-part questions, related to trip characteristics and traveler demographics.

The questionnaire is unique in its design to collect information on a traveler's complete trip itinerary, including information on *every* major destination visited, the length of stay and the type of accommodations utilized. In addition, information on expenses by category is collected, as well as payment method. The level of detail collected in these questions is not available elsewhere.

This report categorizes the questions into six headings, which are listed below, and detailed in the USER'S GUIDE, page xiv.

- Residence
- 2. Pre-trip Arrangements
- 3. Trip Characteristics
- 4. Trip Expenditures
- 5. Airline Information
- 6. Respondent Demographics

Periodic changes to the questionnaire, and consequently the reports, have been made since its inception in 1982. These changes have been made as a direct result of input from industry representatives. In 1996, eleven new tables were added to the report, including information on trip expense payment methods. Detailed descriptions of the changes can be found in Appendix A.

Survey Operations

This survey is conducted voluntarily by selected major airlines. The questionnaires are designed to be self-administered by the respondents, and are distributed on-board flights departing

from U.S. airports to international destinations, or at authorized boarding areas. Questionnaires are available in twelve languages: Arabic, Chinese, English, French, German, Italian, Japanese, Korean, Polish, Portuguese, Russian, and Spanish.

Surveys are conducted monthly, during a seven-day period beginning with the third Monday of the month. The specific flights are selected at random, and participating airlines receive advance listings of the flights to be surveyed. Airlines are then sent survey kits, which contain instructions and questionnaires in the appropriate languages. Airline personnel distribute the questionnaire after boarding, and collect the completed forms prior to debarkation. For a limited number of airlines, data collection takes place at the airport at the departure gate.

Participating airlines are given custom reports on their passengers, enabling comparisons of their passengers with aggregated data from passengers on all airlines.

Survey Participation

Over 50 unique airlines participated in the survey in the four quarters of 2003. Of the original 5,538 flight packages mailed to airlines during that period, 3,329 were returned completed, yielding an overall flight response rate of 60%. Based on information from cabin crews, the average passenger response rate was 46% (See Appendix A in the section titled "Airline Participation".)

In 1996, Sanford International Airport, located approximately 25 miles from metro Orlando Florida, began serving the international market. In 1998, data collection commenced at Sanford, which primarily serves the British charter market.

Please be aware that these international air travelers are not directly represented in OTTI's data in 1996 and 1997. Direct comparisons by markets served by Sanford may not be possible. In addition, 1996/1997 vs. 1998 comparisons of

British and German leisure travelers' market shares may be affected. The 1998 and future data for this market, in particular, is more representative than in previous years.

Airlines to consider for Sanford intercepts are listed in Appendix C.

OTTI relies upon the voluntary participation of airlines to collect data on international travelers. While the data are expanded to represent all travelers based upon the DHS I-94 data, zero respondents times a weight is still zero. This means that if no surveys are collected for a particular market, no weighting scheme can correct for this absence. When reviewing the estimates developed from this report, users need to carefully review the number of respondents for each column heading, as well as the list of participating carriers (see Appendix C). The absence of an airline and lower sample sizes will impact the estimates developed for the origin and destination figures.

OTTI and its contractor, CIC Research, would like to work with the travel industry to add carriers to the Survey of International Air Travelers. In your review of the data, where you notice the absence of international carriers that are important to your country or region, please contact us. We would be delighted to work with you to enlist their voluntary participation. Contact Ron Erdmann, ITA Office of Travel and Tourism Industries at (202) 482-0140 or CIC Research, Inc. at (858) 637-4000.

HOW TO USE THE SURVEY OF INTERNATIONAL AIR TRAVELERS REPORT

General Information

All data presented in this report are statistical estimates, based on survey responses weighted with data from the Department of Homeland Security (DHS). The estimates are subject to a certain amount of error, resulting from the sampling, data collection, and estimation processes. Because of the complicated nature of the sample design, sampling variability has not been calculated for the estimates (see Appendix A for explanation of sample design). Instead, an indication of reliability is given by the number of respondents to the relevant questionnaire item (shown as the first row in each table). The reader must exercise judgment in determining the amount of confidence to place in an estimate. For example, an estimate based on 500 respondents is more reliable than one based on 250 respondents. Results are not reported where the annual number of respondents is less than 250.

Country-level data, in particular should be viewed with caution. Airline participation is voluntary and can change from quarter to quarter. Therefore, if a major carrier for a particular country was unable to participate for a quarter, the data for that country may not fully represent the country's international travelers.

This report presents data in a variety of different formats, as described in the subsection titled Explanation of the Data", below.

Definitions

Following are explanations of report terminology:

CROSSTAB: The top right-hand corner of each page in the report specifies a crosstab number. There are four crosstabs in the report. Every table in a specific crosstab will have the same column headings (banner points).

SECTION: The top right-hand corner of each page in the report also specifies a section number. The sections represent groups of questions (for example, Section 4 represents expenditure questions). There are six sections in each crosstab.

BANNER POINT: The term "banner point" refers to the titles of the columns. At the top of every page in the report are twelve banner points. Each crosstab is composed of a unique set of banner points.

ROW: Row titles are at the left-hand column of each table. They represent responses to the different questions in the survey, some of which may correspond to banner headings at the top of the page. To read the results associated with a particular row, locate the row of interest and move down the column of interest to the intersection, or specific cell, which has the information on how the traveler answered the question.

CELL: A "cell" represents one number in the report. A specific cell can be found at the intersection of a particular column and row. For example, the "cell" which represents All Overseas visitors from Austria can be found on Page 1 of the report. To locate it, find the banner point "All Overseas", and look down it until you come to the row titled "Austria". The number for 2003 is "0.5" (i.e., 0.5%).

table in the report shows the number of respondents to the question. It is shown for each column, and provides the user with an idea of the level of confidence for the estimates in the column. If a column has fewer than 250 respondents, no estimates are reported for that table. *Important Note:* The number of respondents is unweighted, and therefore *cannot be used* to calculate estimates of visitor volume. The method of calculating visitor volume estimates is described in the

subsection titled "Expanding Percentage Estimates to Represent all Visitors" on page x.

Explanation of Banner Points

Each of the four crosstabs in the report contains twelve banner points. The following list describes the respondents included under each banner point.

Crosstab 1

- 1. All Overseas: All respondents to the survey who were not residents of the United States, Canada or Mexico.
- 2. Frequency of Visit First: All overseas respondents who were on a first visit to the United States (Q27a).
- 3. Frequency of Visit Repeat: All overseas respondents who were *not* on a first visit to the United States (Q27a).
- 4. Purpose of Trip Business: All overseas respondents who listed Business/Professional as a purpose of trip (Q10b).
- 5. Purpose of Trip Convention: All overseas respondents who listed Convention/Conference/Trade Show as a purpose of trip (Q10b).
- Purpose of Trip Leisure & VFR: All overseas respondents who listed either Leisure/Recreation/ Holidays/ Sightseeing or Visit friends/Relatives as a purpose of trip (Q10b). Note: Those who listed both are counted only once. This category corresponds to the category titled "Leisure" in reports before 1996.
- Purpose of Trip Leisure (VAC): All overseas respondents who listed Leisure/Recreation/Holidays/ Sightseeing as a purpose of trip (Q10b). This category corresponds to the category titled "Vacation" in reports before 1996.
- 8. Hotel/Motel: All overseas respondents who stayed in a hotel or motel for a portion of their trip (Q14).
- 9. Transportation Airlines in U.S: All overseas respondents who used airline transportation within the U.S. (Q18).
- Transportation Rental Car: All non-U.S. resident respondents who rented an automobile within the U.S. (Q18).

- Package Yes: All overseas respondents traveling on a package (Q15a).
- 12. Package No: All overseas respondents *not* traveling on a package (Q15a).

Crosstab 2

All banner points in Crosstab 2 represent areas of residence within Europe. For example "Belgium" represents all overseas travelers to the United States who reside in Belgium.

Crosstab 3

All banner points in Crosstab 3 represent areas of residence within Asia, Oceania, and the Middle East. For example "P.R.C." represents all travelers to the United States who reside in the People's Republic of China.

Crosstab 4

All banner points in Crosstab 4 represent areas of residence within South America, Central America, the Caribbean and Africa. For example "Peru" represents all travelers to the United States who reside in Peru.

Explanation of the Data

The report presents a variety of types of data. Each type is described below.

NUMBER OF RESPONDENTS: As it is described under "Definitions" above, the unweighted number of respondents is shown on the first line for each table. These numbers represent the only unweighted results in the report, and can be used to assist the user in determining the reliability of the data. They *cannot* be used to calculate estimates of visitor volume. Where the number of respondents is less than 250, no data are shown in the column.

PERCENTAGE ESTIMATES: The majority of the data in the tables represent weighted percentages (see Appendix A for description of weighting). For example on page 13, Table 21, in the cell at the intersection of the banner point "First" and the row "Rented Auto" the number "23.7" can be found. This means that, weighted, 23.7% of first-time visitors to the U.S. rented an automobile in the U.S. during 2003.

VISITOR VOLUME/ EXPANDED ESTIMATES: A figure that represents the total number of visitors for each column can be found at the end of Table 1 in each crosstab. Where the columns represent countries or world regions, the figure is the actual number of visitors reported by the DHS (Crosstabs 2, 3 and 4, and Column 1 in Crosstab 1). Where the columns represent trip characteristics, the figure is an estimate, based on the survey and DHS data (Crosstab 1, Columns 2 through 12). The numbers are shown in thousands.

MEANS AND MEDIANS: Where meaningful, means and medians are shown for specific tables.

DOLLAR AMOUNTS: Tables 26 and 27 report figures in dollar amounts. All amounts are in U.S. currency and represent current dollars.

IMPORTANT ADDITIONAL INFORMATION:

Column-Readable Data: Information in the tables should be read down columns, not across rows. For example, on Page 1, Table 1, the cell at the intersection of banner point "Convention" and row "Western Europe" is 36.6. This means that 36.6% of all convention visitors came from Western Europe. It does *not* mean that 36.6% of Western European travelers were convention visitors.

Single-Response Tables: The majority of the tables in this report are single-response tables, meaning the respondent could only give one answer to the survey question represented by the table. In single-response tables, all numbers in a column will generally add to 100%. Exceptions are Tables 1, 23 and 24, where sub-headings are given in the rows. In these tables, all primary headings will add to 100%.

Multiple-Response Tables: The multiple-response tables in the report are noted with an asterisk. In multiple-response tables, the respondent is allowed to give multiple answers to the survey question represented by the table. Columns will not add to 100% in multiple-response tables.

Expanding Percentage Estimates to Represent all Visitors

In 2003, DHS and OTTI reported 18,026,000 overseas travelers entering the U.S., excluding travelers from Canada and Mexico. Totals for the individual countries and regions in this report are found at the end of Table 1 in crosstabs 2, 3, and 4. They are also shown in the table below.

Region or County	Arrivals	Region or County	Arrivals
of Residence	(000s)	of Residence	(000s)
Europe	8,639	Oceania	525
W. Europe	8,294	Australia	406
Austria	100		
Belgium	151	Middle East	447
France	689	Saudi Arabia	19
Germany	1,180		
Italy	409	South America	1,522
Netherlands	374	Argentina	151
Sweden	211	Brazil	349
Switzerland	230	Chile	95
U.K.	3,936	Columbia	280
E. Europe	345	Peru	154
·		Venezuela	284
Asia	5,003		
Hong Kong	114	Central America	656
Japan	3,170		
P.R.C.	157	Caribbean	998
Philippines	134	Trinidad & Tobago	112
R.O.C. (Taiwa	n) 239	G	
Singapore	88	Africa	236
S. Korea	618	South Africa	72

OTTI has weighted the Survey of International Air Travelers results to the adjusted DHS estimates of total visitors (see Appendix A for an explanation of the weighting process). Because this report presents the weighted results, the percentages listed in the report tables can be expanded to

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¹ Data for additional countries are available in the OTTI <u>Summary of International Travelers to the U.S.</u> See Introductory Section for ordering information.

estimate the total number of visitors for any selected category. Following are four examples that will help explain the process.

Beginning with the 1997 data, OTTI implemented a new policy with regard to releasing visitor estimates based upon smaller sample sizes. If the number of sampled visitors to a particular destination is under 100, OTTI will not calculate or provide an estimate of the total number of visitors to the destination even though an estimate could be developed from this report. Additionally, OTTI strongly suggests that all users of these statistics not attempt to calculate visitor estimates when it appears that the sample size is less than 100. The next paragraph contains an explanation of how to determine which destinations may have sample sizes that are too small.

Turn to page 51, under the "Europe" column. The number of respondents listed is 9,416. If you divide 100 by 9,416 you obtain .0106 or approximately 1.1%. Looking down the column, any destination with 1.1% or more probably has a sample size of 100 or greater and can be used to estimate the total number of visitors. Destinations with less than 0.9% probably have sample sizes under 100 and should not be used to assess visitor characteristics.

Example 1, below, shows how to calculate visitor estimates from the data in this publication. Again, when applying the example to your own calculations, first check to see if the sample size is over 100. If it isn't, the calculation should not be used.

If you have any questions regarding the logic of the process, or how to obtain the visitor estimates for other segments, please call OTTI at (202) 482-0140. Any staff member can answer your "how to" questions. Mr. Ron Erdmann and Richard Champley are the program managers for the Survey of International Air Travelers.

More detailed questions relating to the survey results should be directed to Mr. Erdmann or to Mr. Champley.

Example #1: HOW MANY OVERSEAS RESIDENTS VISITED CALIFORNIA IN 2003?

To obtain this estimate you will need to multiply the total number of visitors to the U.S. in 2003 by the percentage who reported they visited California. This can be accomplished as follows:

- 1. Find the total number of visitors to the U.S. in 2003; Turn to Crosstab 1, Table 1, Page 3. The first column is "All Overseas". Find the number at the bottom of the column, 18,026,000. (The listed number is in thousands.)
- Find the percent of total visitors with a California destination: Turn to Crosstab 1, Table 24, and Page 24 – U.S. Destinations Visited. In the cell at the intersection of the banner point "All Overseas" and the row "California" is the figure 22.1%.
- 3. Multiply 18,026,000 x .221. This shows an estimated 3,984,000 overseas travelers visited California in 2003.

Always round the totals to the nearest thousand; the survey estimates are not precise enough for the last three digits.

This process can be used with any of the percentages listed under the "All Overseas Travelers" banner point.

Example # 2: HOW MANY RESIDENTS OF JAPAN VISITED THE HAWAIIAN ISLANDS IN 2003?

To obtain this estimate you will need to multiply the total number of Japanese residents who visited the U.S. by the percentage that visited the Hawaiian Islands. This can be accomplished as follows:

- 1. Find the total number of Japanese residents who visited the U.S. in 2003; Turn to Crosstab 3, Table 1, and Page 67. The third column is "Japan". Find the number at the bottom of the column, 3,170,000.
- Find the percentage of Japanese visitors with a Hawaiian Island destination: Turn to Crosstab 3, Table 24, and Page 90 - U.S. Destinations Visited. In the cell at the intersection of the banner point "Japan" and the row "Hawaiian Islands" is the figure 43.2%.

² Because the data are weighted, this mathematical procedure gives estimates of sample sizes, not exact sample sizes.

3. Multiply 3,170,000 x .432. This yields an estimate of 1,369,000 Japanese travelers who visited the Hawaiian Islands in 2003.

Again, always round the estimates to the nearest thousand. This calculation method can be applied to any of the banner points in Crosstabs 2, 3, and 4.

Example # 3: HOW MANY OVERSEAS RESIDENTS ON BUSINESS VISITED NEW YORK CITY IN 2003?

To obtain this estimate you will need to multiply the total number of overseas visitors to the U.S. on business by the percentage of business travelers who visited New York City. This can be accomplished as follows:

- 1. Find the total number of business visitors to the U.S. in 2003: Turn to Crosstab 1, Table 1, and Page 3. The fourth column is "Business". Find the number at the bottom of the column, 4,687,000.
- Find the percentage of business visitors with a New York City destination: Turn to Crosstab 1, Table 24, Page 19 – U.S. Destinations Visited. In the cell at the intersection of the banner point "Business" and the row "New York City" is the figure 24.8%.
- 3. Multiply 4,687,000 x .248. This yields an estimate of 1,162,000 business travelers who visited New York City in 2003.

As before, always round the totals to the nearest thousand.

Example #4: HOW MANY OVERSEAS TRAVELERS WHO STAYED IN A HOTEL OR MOTEL IN 2003 RENTED AN AUTO?

To obtain this estimate you will need to multiply the total number of overseas visitors who stayed in a hotel or motel by the percentage of them who rented an auto. This can be accomplished as follows:

1. Find the total number of visitors to the U.S. who stayed in a hotel or motel: Turn to Crosstab 1, Table 1, and Page 3. The eighth column is "Hotel/Motel". Find the number at the bottom of the column, 13,898,000.

- Find the percentage of hotel/motel who rented an auto: Turn to Crosstab 1, Table 21, and Page 13 - Transportation in U.S. In the cell at the intersection of the banner point "Hotel/Motel" and the row "Rented Auto" is the figure 34.5%.
- 3. Multiply 13,898,000 x .345. This yields an estimate of 4,795,000 hotel/motel visitors who rented an auto in 2003.

Always round the totals to the nearest thousand.

FINAL NOTE: If your needs require data not presented in this report, please be aware that a number of related reports are published on an annual basis. These reports are listed in the introductory section of this report. Additionally, special data runs can be generated for many of the questions in the survey or populations of respondents. Information is available by calling OTTI (202) 482-0140. In most cases, you may be directed to their contractor(s).

The User's Guide

The following user's guide has been designed to help make your information search easy. There are four different crosstab divisions listed. Each crosstab contains twelve banner points (titles to the banner points are not listed in the user's guide). There are six sections in each crosstab, with a total of 35 tables. The sections, tables, and crosstabs are all listed in the user's guide.

The best way to find what you want is to decide on your question, go to the user's guide and determine if it can be answered by the different combinations of crosstabs and tables provided in this report. Find out which crosstab it is under, and then find the section and table number. Each crosstab is separated by a divider page. The sections and tables are in numerical order. By paging through this report, you can find information on thousands of different attributes of overseas residents who traveled to the U.S. in 2003.

For further information on all aspects of the survey, see the Appendices to this report.

ITA, OFFICE OF TRAVEL AND TOURISM INDUSTRIES SURVEY OF INTERNATIONAL AIR TRAVELERS OVERSEAS TRAVELERS TO THE UNITED STATES

USER'S GUIDE

Cross Tabs						
Tabl	e Number and Descr iption	1. All Overseas, Freq. Of Visit, Purpose of Trip, Hotel/Motel, Transportation, Package	2. Area of Residence – Europe	3. Area of Residence – Asia, Oceania, Middle East	4. Area of Residence - South America, Central America, Caribbean, Africa	
Table 4	Section 1	Dono 4	Dans OF	Dags 67	Daga 00	
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-	Section 2	5	D 00	B 00	D 404	
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Table 3	Advance Airline Reservation	Page 4	Page 36	Page 68	Page 101	
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	Travel Companions	Page 8	Page 40	Page 72	Page 105	
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Table 31	Type of Airline Ticket	Page 32	Page 64	Page 96	Page 129	
	Seating Area	Page 32	Page 64	Page 96	Page 129	
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Table 33	Sex & Age of Traveler	Page 33	Page 65	Page 97	Page 130	
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	endices and Questionnaire		- 3	- 3	- 9	

EXPLANATION OF SYMBOLS IN TABLES

- A dash represents one of the following:
 - A response of less than 0.05%
 - Fewer than 250 respondents in the column (banner point)
- * An asterisk denotes tables that are multiple response. In these tables the column percentages may total to over 100%.