



Travel Market Insights



COVID-19 (CORONAVIRUS)

What We Know

An Update from Travel Markets Insights Inc.

Produced by: Travel Market Insights Inc. (TMII)





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The global response to the COVID-19 pandemic has resulted in an unprecedented impact on international travel to the United States.

The following is an effort to keep our partners informed on “What We Know” regarding international visitation to and within the U.S. Normally this month we would be reporting our latest forecast. However, forecasts, ‘today,’ are more speculative than any other time. So we are focused on what we know for the moment.

2019 international visitation and profile data to the U.S. and all states and cities from top overseas countries, Canada, and Mexico will be available in May 2020. 2019 will be the *New Benchmark* year going forward.

The team at TMII continues to work (from home) to help keep our partners informed. We hope that the following update on *What We Know* will be informative. Please feel free to use and share this information with your industry partners.

Stay safe,

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Current U.S. Visitation

- The most recent data from the U.S. Department of Commerce shows that visitation from overseas countries to the U.S. declined 27% through March 2020 with the impact from the coronavirus escalating dramatically in March.
- March 2020 overseas visits declined 70% compared to 2019. 869,768 residents from overseas countries visited the U.S. in March 2020.
- China has taken the hardest hit, March visits declined 94.4% from last year, while year to date visits to the U.S. are down 50.7%.

TOP OVERSEAS VISITOR MARKETS BY VOLUME			
JANUARY - MARCH 2020			
COUNTRY OF RESIDENCE	NUMBER OF ARRIVALS	YOY % CHANGE	MARCH YOY % CHANGE
All OVERSEAS	6,155,300	-26.6	-69.9
UNITED KINGDOM	695,161	-23.3	-66.1
JAPAN	666,273	-26.9	-73.2
BRAZIL	405,615	-27.3	-67.9
SOUTH KOREA	390,755	-25.1	-85.6
CHINA, PRC	364,735	-50.7	-94.4
FRANCE	279,968	-20.9	-69.3
GERMANY	273,126	-27.5	-66.5
INDIA	232,272	-17.7	-63.9
AUSTRALIA	198,640	-21.0	-59.1
ARGENTINA	152,014	-28.9	-67.5

Source: NTTO, TMII Inbound Travel Monitor

WORLD REGION OF RESIDENCE	March 2020			YEAR-TO-DATE 2020		
	NUMBER OF ARRIVALS	2020 SHARE	% CHANGE FROM 2019	NUMBER OF ARRIVALS	2020 SHARE	% CHANGE FROM 2019
WESTERN EUROPE	325,859	37.5	-68.5	2,069,383	33.6	-24.6
EASTERN EUROPE	32,972	3.8	-60.6	195,239	3.2	-16.8
ASIA	190,016	21.8	-79.0	1,909,380	31.0	-32.3
MIDDLE EAST	22,825	2.6	-70.9	181,483	2.9	-22.8
AFRICA	15,095	1.7	-60.9	77,930	1.3	-20.6
OCEANIA	40,667	4.7	-58.1	241,486	3.9	-20.5
SOUTH AMERICA	160,569	18.5	-64.0	1,002,527	16.3	-26.5
CENTRAL AMERICA	33,465	3.8	-59.7	220,718	3.6	-17.9
CARIBBEAN	48,300	5.6	-59.3	257,154	4.2	-18.1
TOTAL OVERSEAS	869,768	100.0	-69.9	6,155,300	100.0	-26.6

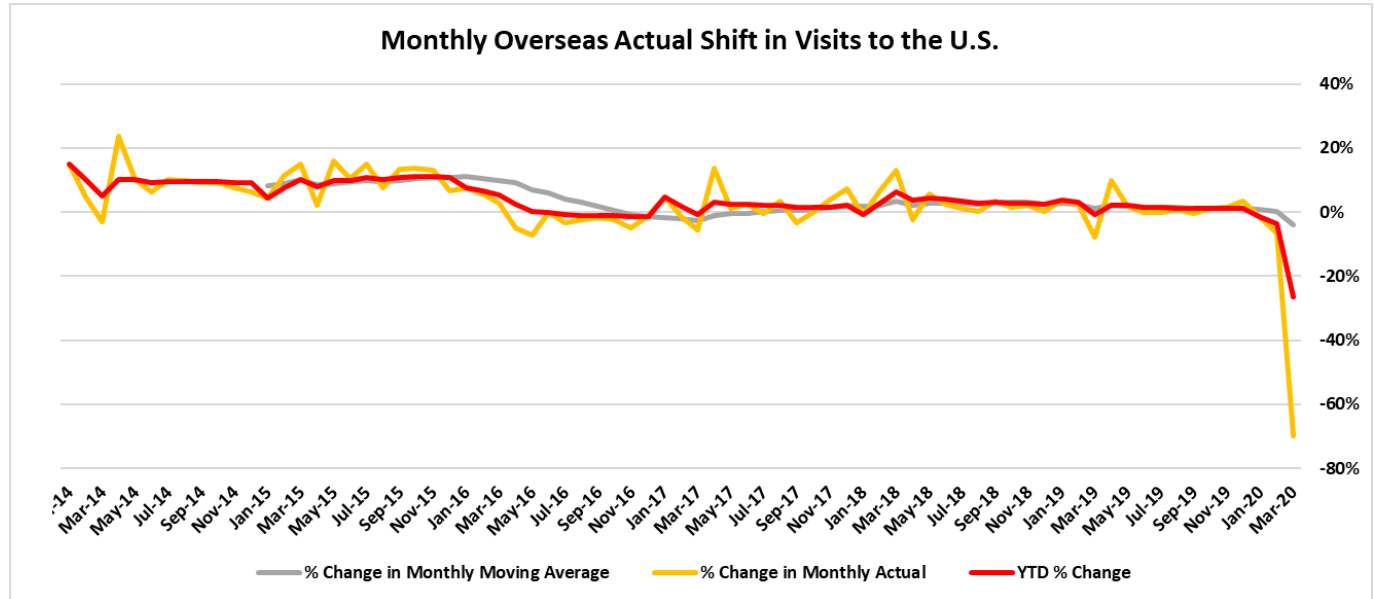
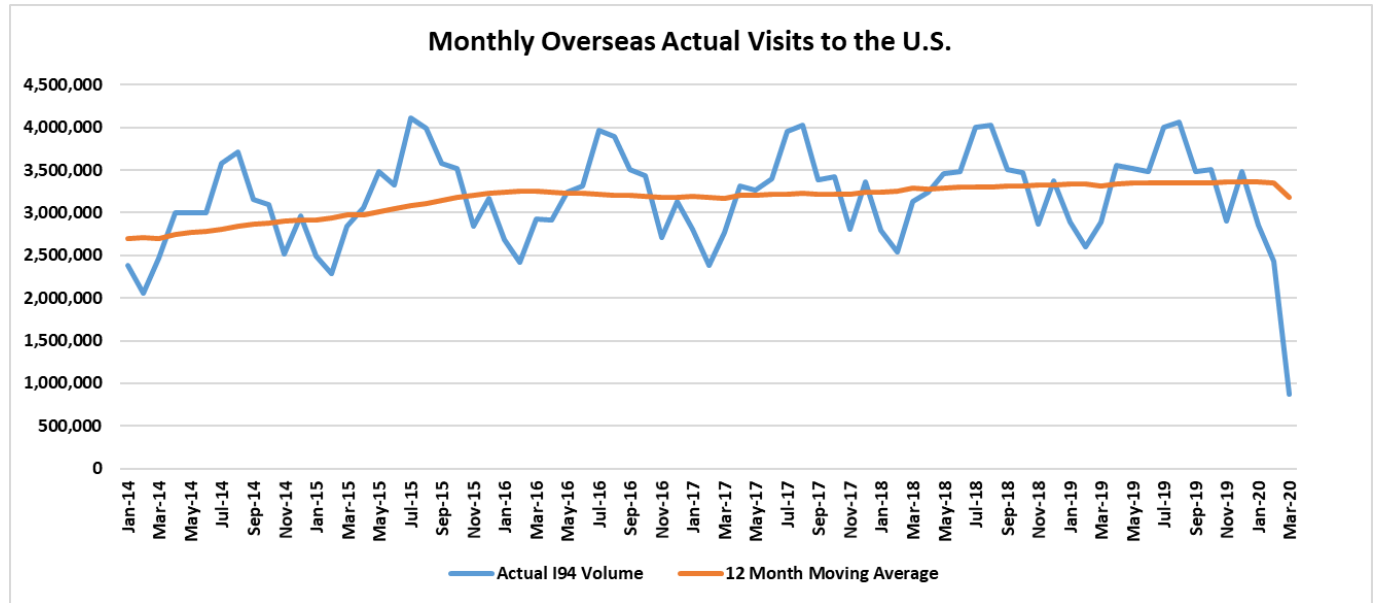
Source: NTTO

- March visits declined the strongest in Asia, down 79% compared to March 2019 visits. Year to date visits from Asia were down 32.3%, also the strongest decline compared to the other world regions.
- Western Europe (68.5%) was nearly on par with the overseas decline (69.9%) in March 2020. Through March visits decline only 24.6%, reflecting the growth registered in February.
- South America visitation was down 64% in March. Visits for the year (through March) contracted 26.5%.

Monthly-Tracker

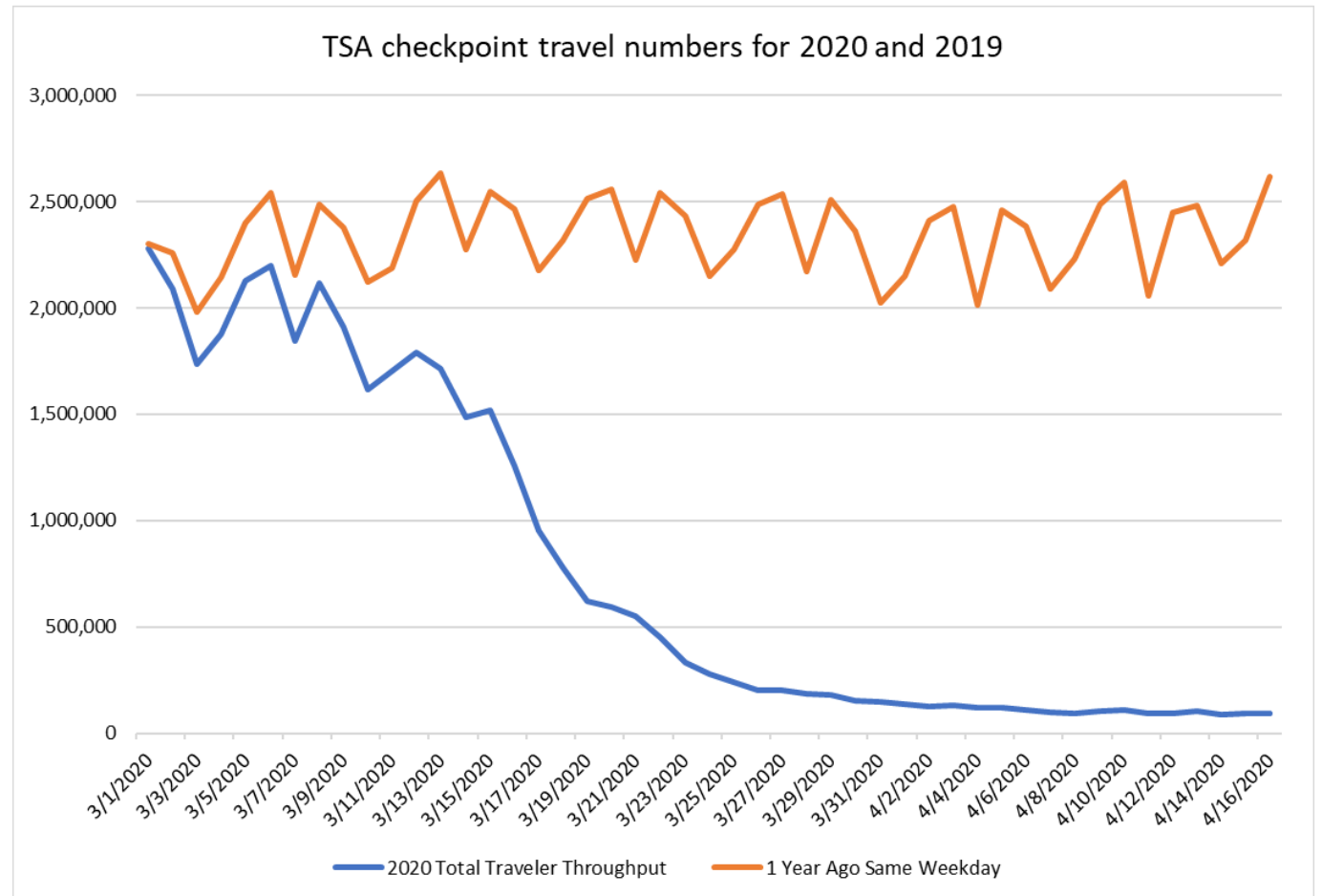
The Monthly-Tracker is a tool TMII uses to model trends for our Inbound Travel Monitor (ITM). The ITM tracks and projects visits to the U.S. and the distribution of visits throughout all states and 40 plus cities. Sources for the Monthly-Tracker charts include: NTTO, DHS, ADIS, TMII (ITM).

- The top chart tracks:
 - monthly actual visits
 - 12-month moving average for visits
- The second chart tracks:
 - % change in monthly moving average
 - % change in monthly actual visits
 - YTD % change



TSA Checkpoint Travel Numbers

- Weekly TSA travel numbers show a flattening out. This is for all TSA checkpoint travel numbers (domestic and international).
- The TSA weekly tracker is one indicator for air travel to, from, and within the U.S.
- We will continue to watch the TSA Checkpoint data for early signs of a rebound – indicating more passengers are traveling through U.S. airports.



Confirmed Cases of COVID-19 Compared to Shift in Visitor Volume



	YTD Thru March 2020	YTD % Change	Confirmed Cases*	https://ncov2019.live/data
CHINA, PRC	364,735	-50.7	84,149	82,341
TAIWAN	79,146	-34.0	<i>in China #</i>	395
ITALY	126,875	-31.6	168,941	168,941
ARGENTINA	152,014	-28.9	2,598	2,571
GERMANY	273,126	-27.5	133,830	137,698
BRAZIL	405,615	-27.3	28,320	30,425
JAPAN	666,273	-26.9	9,167	8,626
ECUADOR	74,574	-26.1	8,225	8,225
SOUTH KOREA	390,755	-25.1	10,635	10,613
COLOMBIA	135,235	-24.1	3,105	3,233
UNITED KINGDOM	695,161	-23.3	103,097	103,093
NETHERLANDS	102,246	-22.4	29,214	29,214
IRELAND	77,461	-22.3	13,271	13,271
AUSTRALIA	198,640	-21.0	6,468	6,468
FRANCE	279,968	-20.9	107,778	165,027
INDIA	232,272	-17.7	13,387	13,430
CHILE	78,598	-16.4	8,807	8,807
SPAIN	132,299	-15.8	182,816	184,948

* Source - World Health Organization



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* Source - World Health Organization

Top Overseas Countries Ranked by Visitor Volume to U.S. in 2024 (Jan 2020 forecast)

- Headlines and growth are important but looking at the volume in 2024 provides a different ranking perspective.
- The UK will remain the top U.S. country for visits through 2024.
- The top 5 markets in 2018 will still be the top volume markets in 2024 apart from Brazil overtaking South Korea.
- The remaining top 10 visitor markets will also remain the same.
- Argentina, currently ranked 11th, will slide to 13th.



Note: Canada is the top international visitor market for most U.S. states.

What's Next



Here is what we are working on:

1. 2019 year-end annual visitor arrivals and visitor profiles for all 50 states and 40+ cities from Canada, Mexico, and top overseas countries.
2. Inbound Travel Monitor (ITM) Monthly Projector. The new ITM – Monthly Projector will provide all 50 states with a monthly indicator of visitation by the top international visitor markets.
3. XBorder Canada – monthly consumer survey for travelers planning and visiting the U.S. Canada will be a key early rebound market for the U.S., especially the drive market. (Look for upcoming TTRA presentation.)
4. UK (in-country) Travel Trade Survey – Survey of UK travel trade that promote and sell travel to the U.S. Brexit was the concern, now?

Sources



Sources used in this What We Know report:

- Advance Passenger Information System (APIS)
- Bureau of Economic Analysis (BEA)
- Department of Homeland Security (DHS)
- National Travel and Tourism Office (NTTO)
- Summary of International Travel to the United States (formally I-94)
- Survey of International Air Travelers (SIAT)
- Transportation Security Administration (TSA)
- Travel Market Insights (Inbound Travel Monitor) (TMII, ITM)
- U.S. Custom and Border Protection (CBP)
- United Nations World Tourism Organization (UNWTO)
- US Department of Commerce (USDOC)
- World Health Organization (WHO)
- XBorder Canada (XBC)



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