

2017

OVERSEAS VISITORS
To New England



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New England Overseas Visitors 2017 Report

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New England Overseas Visitors 2017 Report

Introduction

The following report sets out to understand the depth and impact of international visitors to New England.

The primary goal for this report is to provide Discover New England (DNE) and the New England states with the research confidence to clearly identify the most productive travel markets and focus their international visitor promotional efforts over the next five years – as a regional promotion entity.

Key Definitions

- A. DNE is the official tourism organization representing the New England census region, and is a non-profit cooperative marketing entity funded by the participating states of Connecticut, Maine, Massachusetts, New Hampshire, and Rhode Island.

For the purposes of this report New England (NE) is defined as the six states that make up the New England Census region. Therefore all references to Discover New England and DNE are the same as referring to New England.

DNE = New England = NE

- B. Overseas: Overseas is defined as all visitors from all countries except Canada and Mexico.
- C. Visitor Arrivals and Visitors to New England are defined as: one person indicating they stayed overnight in one or more of the six New England states during their U.S. visit.
- D. Scandinavia is a marketing region that includes Denmark, Finland, Norway, and Sweden.

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Methodology

This report on overseas visitors to New England was developed by Travel Market Insights Inc. It is based on data compiled from the U.S. Department of Commerce (USDOC), National Travel and Tourism Office (NTTO) "Survey of International Air Travelers (SIAT)." The survey is conducted in cooperation with over 80 major airlines on a sample of their international flights departing from U.S. airports and at airport boarding areas. The survey information is collected from passengers through questionnaires covering traveler demographics, trip activities, places visited, and travel expenditures. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used by the public and private sectors to guide strategic planning and marketing to international air travelers.

Approximately 1,995 survey respondents reported a New England visit in 2017 (as a single year sample). Visitor characteristics are based on a two year sample (4,387). This is an adequate sample size for overseas visitors, providing an opportunity to evaluate the characteristics of the overseas visitor market. However, sampling levels vary by country (visitor market) for New England and should be reviewed in the full custom table data runs.

For the SIAT consumer survey there are two data collection methods. The airport departure gate area/airport-intercept method accounted for approximately 85% of all collections in 2017, while the in-flight method accounted for approximately 15 percent.

Supplemental Airport Survey Program (SASP): The NTTO administers the SASP at certain airlines and airports in order to ensure the sample is proportional to the air traffic numbers. The aim of this program is to develop a public/private partnership to survey additional international flights on a monthly basis to improve airport-specific and destination collections. Currently, NTTO is orchestrating this effort in Atlanta, Baltimore, Boston, Denver, Dallas/Fort Worth, Honolulu, Houston, Las Vegas, Los Angeles, Minneapolis, Orlando, Philadelphia, San Juan, Washington Dulles, and additional ports of departure. Each program is slightly different, but the supplemental collections are being conducted to improve the quality of the data collections at each airport. In all cases the airport authority works in cooperation with its convention and visitors bureau (destination marketing organization).

With the exception of the number of respondents, all the data in the custom run tables are statistical estimates, based on responses to the survey and supplemented with data from the U.S. Department of Homeland Security. Passengers on most charter flights and passengers traveling by air between the U.S. and Canada are excluded.

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Sample Table for New England

	OS	UK	UK Lesiure	Germany	Germany Leisure	Australia	France	Brazil	Japan	China	Italy	Scandinavia
2017 Respondents	4,387	594	344	414	269	127	158	182	461	472	81	131

All samples are based on 2016 and 2017 visitor data averaged to 2017. All prior years were reported in the same manner. The multi-year sample is recommended given some of the country-level samples fall below the recommended statistically relevant level with only one year of sample.

Historically, the USDOC sample cut off was 100 respondents for characteristic data and 300 for visitor estimates. The overseas sample for New England far exceeds the minimums. Sample for the UK, UK leisure, Germany, and Japan are above the recommended sample. Sample for all other countries are strong enough for comparative analysis. It is recommended that results be reported with the understanding that visitation estimates are based on a sample below the threshold. However, visits and visitor characteristics can be used for comparative purposes when used with historical and additional supportive metrics. All are above the minimum 100 respondent level.

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2017 Summary of Overseas Visitors to New England

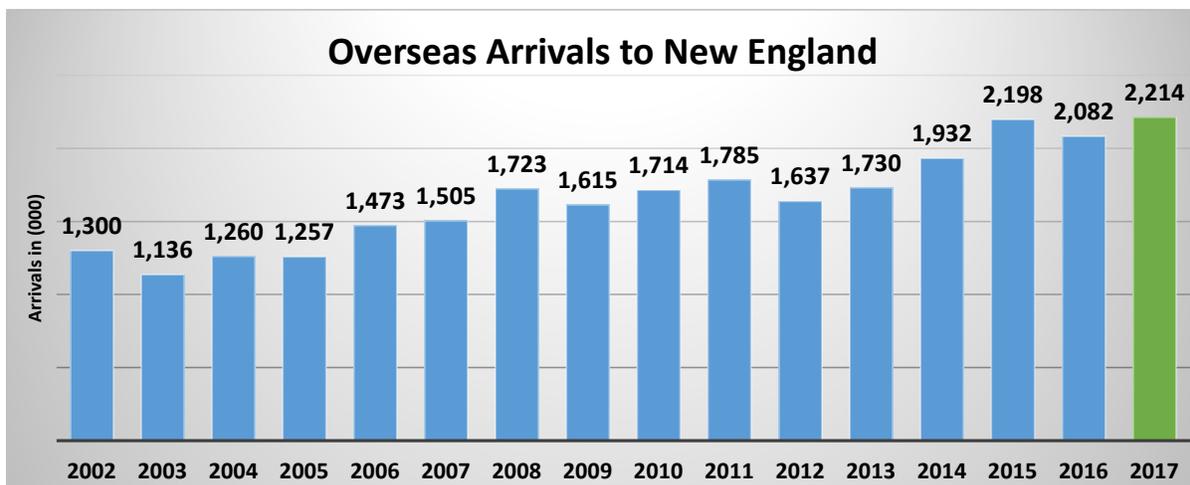
2017 Overseas Arrivals to New England

	2016 (R)		2017		Percent Change
	Market Share	Arrivals in (000)	Market Share	Arrivals in (000)	
Total Overseas	5.46	2,082	5.69	2,214	6.3%

Note: Percent change is based on rounded arrivals.

R = Revised.

- Total U.S. Overseas Market: In 2017 38.9 million overseas visitors traveled to the United States. Overseas arrivals to the U.S. increased 2.0% over 2016 arrivals. Mainland USA was visited by 34.3 million overseas residents. Mainland visits increased by 1.5% in 2017 over 2016.
- New England was visited by over 2.2 million overseas visitors (excluding Canada and Mexico) that indicated they stayed overnight in the region during their visit to the U.S. in 2017.
- Since 2005 visits have increased 76%, and 2017 visits are at an all-time high.
- New England arrivals in 2017 increased 6.3 percent. New England registered increases in arrivals from nearly all world regions to register a record year.



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New England 2017 Total Direct Spending

Visitor Spending by Overseas Visitors to New England*					
	2013	2014	2015	2016	2017
Spending (in Billions)	\$4.2	\$4.9	\$6.1	\$6.1	\$7.1
% Change		15.5%	25.0%	0.6%	16.5%

Sources: Travel Market Insights Inbound Travel Monitor - Destination Spending Model, DNE custom SIAT reports, Bureau of Economic Analysis, National Travel and Tourism office.

*Spending includes all visitor spend: including business, leisure, education, and other spend.

- In 2017 over 2.2 million overseas visitor spent \$7.1 billion traveling to destinations in New England.
- Spending was at record levels, increasing 16.5% over 2016. Overseas visitors spent \$1.0 billion more in 2017, compared to 2016.
- Overseas visitors to New England spent an estimated \$3,214 per visit in New England, and \$243 per visitor per day in New England on average.

Visitor Spending by Overseas Visitors to New England*				
	2014	2015	2016	2017
Total Overseas Spending (in Billions)	\$4.9	\$6.1	\$6.1	\$7.1
Select Country spending (in Millions)				
China	\$1,070.4	\$1,541.3	\$1,721.0	\$2,130.5
United Kingdom	\$330.0	\$467.1	\$528.7	\$615.8
Brazil	\$161.0	\$251.5	\$225.2	\$270.4
France	\$91.5	\$207.8	\$170.8	\$223.2
Germany	\$235.7	\$262.1	\$277.2	\$222.4
Australia	\$167.9	\$173.4	\$202.9	\$199.5
Japan	\$104.5	\$127.8	\$193.5	\$155.0
Italy	\$122.6	\$79.3	\$58.5	\$104.8

Sources: Travel Market Insights Inbound Travel Monitor - Destination Spending Model, DNE custom SIAT reports, Bureau of Economic Analysis, National Travel and Tourism office.

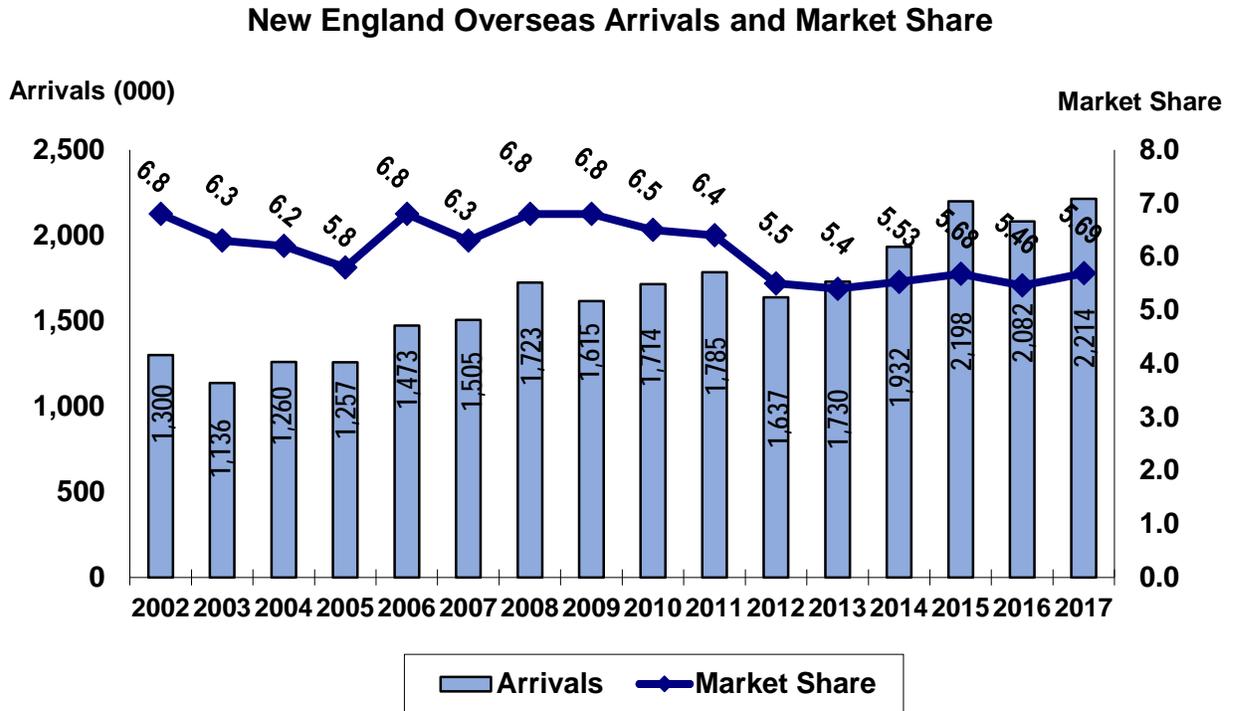
*Spending includes all visitor spend: including business, leisure, education, and other spend.

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- In 2017 China was the top visitor market and top spender for New England. In 2017 380,000 Chinese visitors spent an estimated \$2.13 billion US dollars traveling in New England. The high spending was a result of a 21 night stay on average.
- In 2017 292,000 British visitors spent approximately \$616 million in New England. British visitors stayed in the region approximately 10.0 nights – which was strong, however, below the overseas average and much lower than the Chinese visitors.
- Germany ranked third for visitor arrivals, however, they ranked fifth for spending. In 2017 148,000 German visitors spent \$222 million while traveling in New England.
- Australian visitors spent the most on a per visitor per day basis (\$395 on average), followed by Japanese visitors (\$349 on average).
- If spending was ranked for the region by total spending per stay (the combination of nights in New England and average spending per visitor per night), then China would be the top market, followed by Australia and then Brazil – ahead of Japan, the UK, France, Italy, then Germany.

New England Overseas Visitors 2017 Report

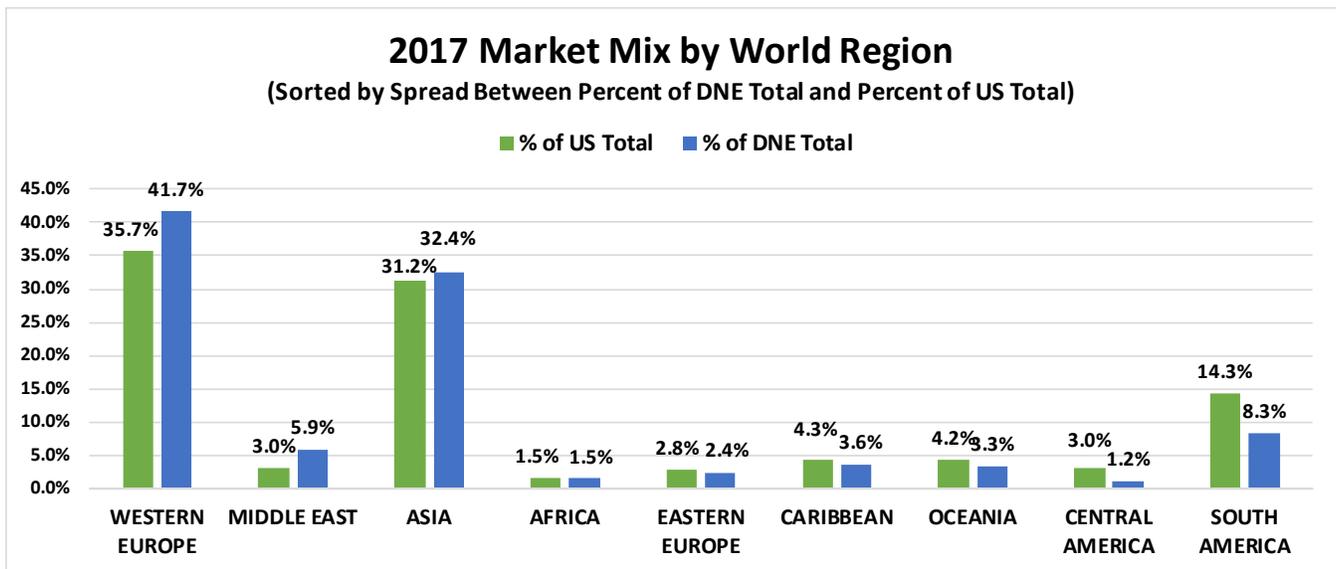
New England Market Share



- In 2017 New England attracted 5.69% of all overseas visitors that came to the United States.
- New England's share of total overseas visitors to the U.S. expanded 0.23 percentage points to 5.69% in 2017, up from 5.46% in 2016.
- Historically, the region's competitive position was slightly higher. However comparably, the 2017 market share is below the average over the past 16 years (6.12%).
- Market share peaked to 6.8% in 2006, 2008, and 2009. Starting in 2010, growth in visits to the U.S. from non-traditional markets increased substantially faster than visits from traditional markets in Western Europe. As a result, the region registered a decline in its competitive position.

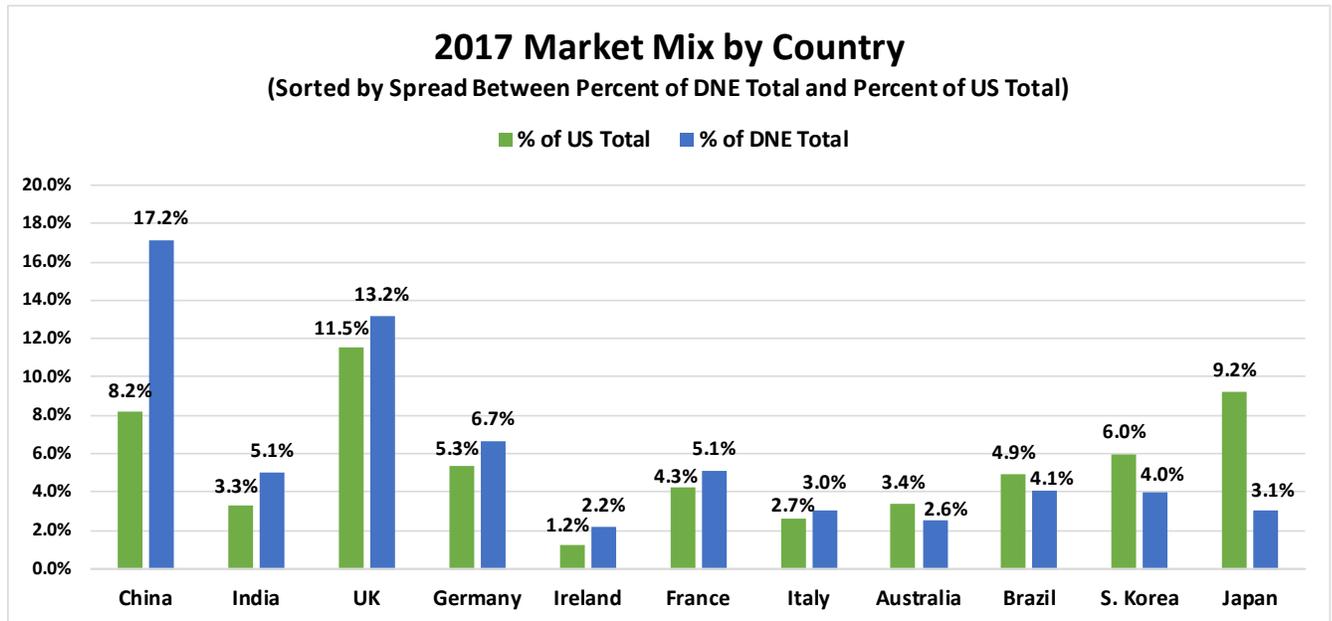
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- New England’s market mix historically focused on Western European markets. The region has adapted to attract visitors from Asia, where three out of every ten visitors to the region are residents.
- That trend continued into 2017. Market penetration for the region is strongest in Western Europe, on par with Asia and weakest in South America.
- A great deal of the adjustment is due to new airlift into Boston and New York from other world regions. This trend appears to be continuing as Boston and other New England airports are expanding international air service.
- The region should continue to maintain its competitive position in Western Europe and now in Asia.

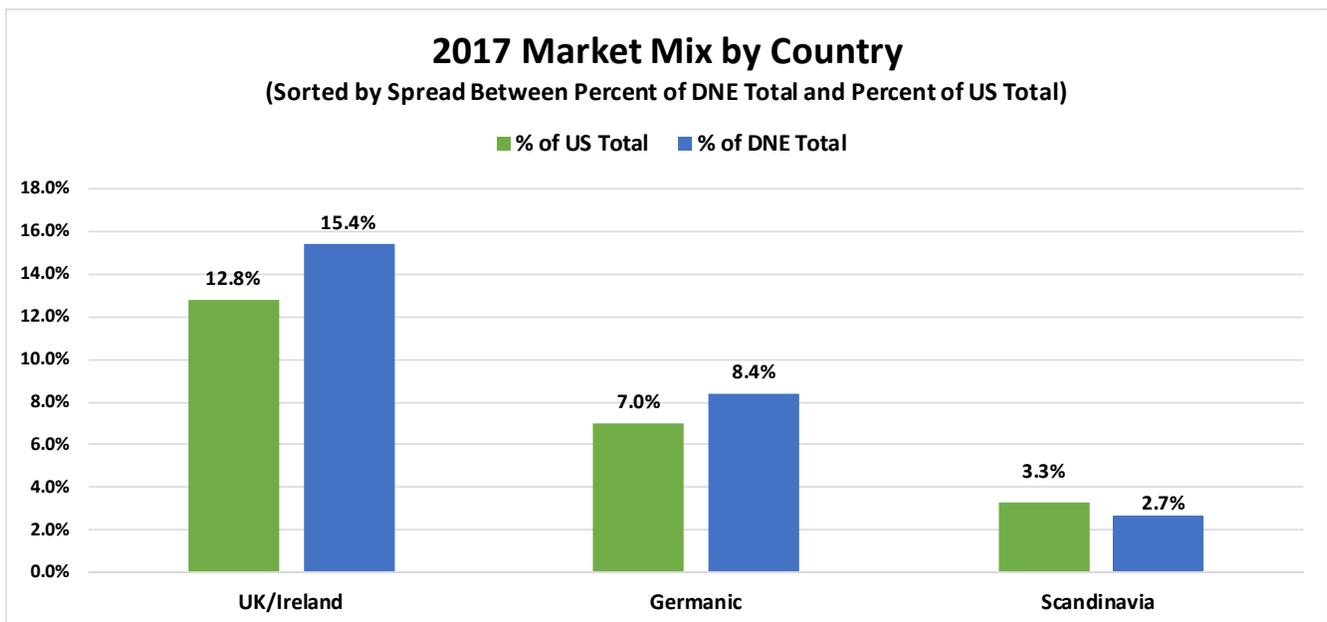


- Market mix by key country indicates the region has a very strong position in China given China accounted for 17% of the region’s visitors in 2017. The region is strong in India, the UK, Germany, Ireland, France, and Italy where the region has more of its visitors from these markets compared to the U.S. overall.
- In contrast, Australia, Brazil, South Korea, and Japan have a smaller presence for New England compared to the United States.

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- New England also has a stronger share of visitors from UK/Ireland (combined) when compared to the United States. Germanic markets (Germany, Switzerland and Austria combined) also account for a larger share of the region's visitors compared to the United States. In contrast, Scandinavian visitors have a slightly lower share for New England compared to the United States.
- Additional air routes and access (indirect and direct) for Australia, Brazil, South Korea, and Japan will make the region even more competitive.



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Arrivals by World Region and Overseas Countries

- New England registered increases in arrivals from all world regions, with the exception of Oceania and Europe (influenced by a downturn from Eastern Europe). Western Europe grew by 0.7%.
- Visits from Africa registered the strongest growth in 2017, followed by the Middle East. The Middle East, however, registered sizable volume growth, adding 40,000 additional visitors. This growth should be reviewed closely given U.S. arrivals contracted overall. Increases in new lower cost air service is likely one factor. The largest volume growth was in Asia, adding 89,000 additional visitors in 2017 compared to 2016.

New England 2016 and 2017 Overseas Visitor Arrivals						USA
(ranked by 2017)	2016 Visitor* Estimate (IN 000s)	2016 DNE Market Share	2017 Visitor* Estimate (IN 000s)	2017 DNE Market Share	2017/2016 Visitor Estimate Percent Change	2017/2016 Visitor Estimate Percent Change
ALL OVERSEAS	2,082	5.46%	2,214	5.69%	6.3%	2.0%
EUROPE	985	6.64%	984	6.57%	-0.1%	1.0%
WESTERN EUROPE	917	6.63%	923	6.65%	0.7%	0.4%
ASIA	628	5.44%	717	5.91%	14.2%	5.2%
SOUTH AMERICA	175	3.24%	184	3.32%	5.1%	2.8%
MIDDLE EAST	90	6.68%	130	10.98%	44.4%	-12.0%
CARIBBEAN	70	4.39%	80	4.78%	14.3%	5.3%
OCEANIA	85	5.13%	74	4.53%	-12.9%	-1.8%
EASTERN EUROPE	69	6.92%	54	4.97%	-21.7%	8.9%
AFRICA	22	3.86%	33	5.60%	50.0%	1.8%
CENTRAL AMERICA	23	1.95%	26	2.20%	13.0%	-1.6%

* See background and methodology for sample variability

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New England 2016 and 2017 Overseas Visitor Arrivals						USA
(ranked by 2017)	2016 Visitor* Estimate (IN 000s)	2016 DNE Market Share	2017 Visitor* Estimate (IN 000s)	2017 DNE Market Share	2017/2016 Visitor Estimate Percent Change	2017/2016 Visitor Estimate Percent Change
China	298	9.77%	380	11.98%	27.5%	4.1%
UK	268	5.84%	292	6.51%	9.0%	-2.3%
Germany	170	8.31%	148	7.10%	-12.9%	1.7%
France	101	6.18%	114	6.81%	12.9%	1.6%
India	112	9.29%	112	8.73%	0.0%	6.5%
Brazil	76	4.43%	90	4.69%	18.4%	10.8%
South Korea	68	3.44%	89	3.82%	30.9%	17.8%
Japan	81	2.24%	68	1.90%	-16.0%	-0.2%
Italy	48	4.90%	67	6.46%	39.6%	-0.2%
Australia	72	5.36%	57	4.33%	-20.8%	-2.0%
Ireland	45	10.25%	49	10.15%	8.9%	9.2%

* See background and methodology for sample variability

R=Revised by USDOC, NTTO October 2018

- Seven of the top ten key markets registered positive year over year growth, and most increased at a faster rate than the United States. The growth markets included: China, UK, France, Brazil, South Korea, and Italy. Ireland registered strong year over year growth, however, the U.S. grew at a slightly faster rate.
- China, the top visitor market, added the most visits (82,000 additional visitors) in 2017 over 2016. The UK registered the second largest increase in visitors in 2017 over 2016 (adding 24,000 visitors). Combined, the UK and Ireland added 28,000 additional visitors in 2017.

New England 2016 and 2017 Overseas Visitor Arrivals						USA
(ranked by 2017)	2016 Visitor* Estimate (IN 000s)	2016 DNE Market Share	2017 Visitor* Estimate (IN 000s)	2017 DNE Market Share	2017/2016 Visitor Estimate Percent Change	2017/2016 Visitor Estimate Percent Change
UK / Ireland	313	6.23%	341	6.87%	8.9%	-1.3%
Germanic	220	8.11%	186	6.84%	-15.5%	0.1%
Scandinavia	66	4.98%	59	4.58%	-10.6%	-2.1%

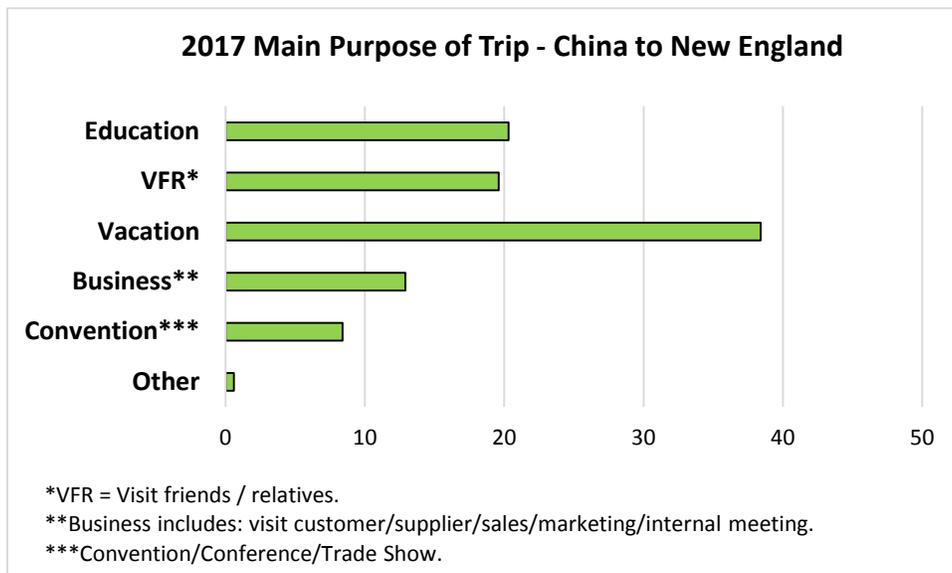
* See background and methodology for sample variability

R=Revised by USDOC, NTTO October 2018

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Chinese Visitors to New England in 2017

- China became the region's largest visitor market in 2016 and expanded that increase in 2017.
- In 2017 380,000 Chinese residents visited New England, up 27.5% from 2016.
- Over one in ten (11.98%) Chinese visitors to the U.S. visited New England.
- New England arrivals from China grew at a faster rate than the U.S. overall (up 4.1%), resulting in an increase in market share from China (up from 9.77% in 2016).
- The top ports of entry for Chinese visitors that visited New England included: Boston (27%), New York (16%), Los Angeles (8%), Newark NJ (7%), Chicago (7%), San Francisco (5%), and Detroit (3%).
- The 380,000 Chinese visitors to New England spent nearly \$2.1 billion USD while traveling throughout New England.
- Chinese visitors spent 20.5 nights in the region on average, which reflects the strong student/education component for the region.
- Marketing strategies for China should strongly consider the market's potential for each trip type segment and consider how best to promote to travelers seeking multiple-experience travel.



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Chinese Visitors to the U.S. in 2017

- In 2017 3.17 million Chinese residents traveled to the United States.
- Visitation increased by 4.1% in 2017, adding 124,000 additional visits.
- In 2017 China ranked as the third largest overseas market, accounting for 8.16% of total overseas visits to the United States. In addition, the Chinese share grew from 8.00% of total overseas visits in 2016.
- China ranked as the sixth largest market, by volume, for vacation visitors (main purpose).
- China's share of total international visitors increased in 2017 to 4.13%, up from 3.99% of all visits in 2016.
- China is the second largest national economy in the world by GDP and the largest by purchasing power.
- Visitation is forecast to increase 28%, at an average annual rate of 4.2% between 2017 and 2023, to reach nearly 4.1 million by 2023.
- Challenges ahead: China's economic growth is expected to hold in 2018 with fiscal stimulus that will keep GDP growth around 6.5% in 2017 and 2018. The exchange was expected to remain steady, however, in April 2018 the Yuan started to depreciate in large part due to the trade talks. The exchange rate is projected to continue to decline through 2018 due to the trade war and concern over the real estate bubble. Policy adjustments, including tax cuts, are expected but will likely bring increased inflation.
- Deceleration of Chinese visitors was first reported by TMII in October 2017 along with early indicators of over capacity by major Chinese carriers. In 2018 the deceleration of growth continued and for the first time first quarter visits contracted -0.5% year over year. The early deceleration (in 2017) was primarily tied to the exchange rate and a very competitive environment (both inter-regional and long-haul). In 2018 visits for the first time are contracting year over year. This accelerated downturn in 2018 visits is tied to the trade wars and the rise in Chinese nationalism, along with the exchange rate and competitive demand. Through May 2018 visits from China to the U.S. contracted -1.4% year over year. In addition, visa approval and concern surrounding visa approval may slow travel and may result in airlines reducing air capacity. Visa approval rates should be watched closely as well as the airlines reaction to the visa approval rates. In 2018 domestic travel in China is also growing at a faster rate than outbound.

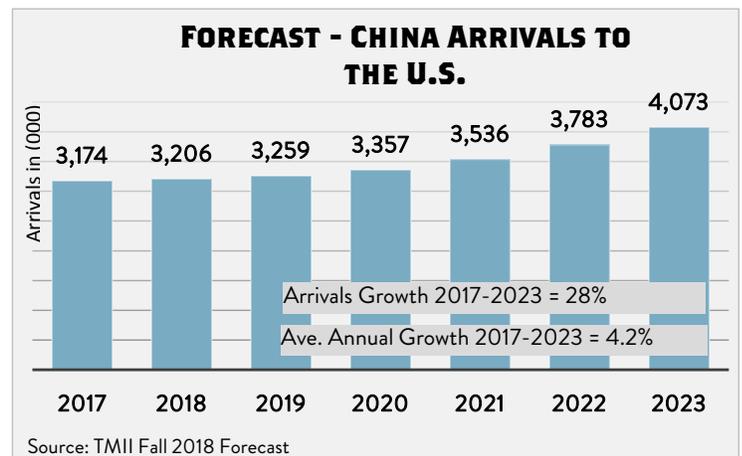
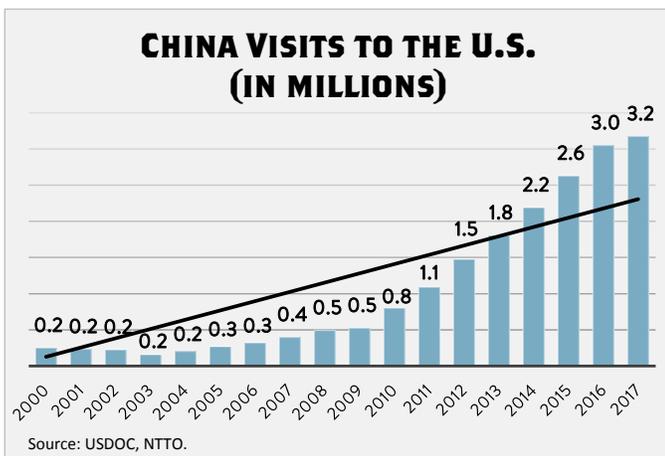
Key Chinese Market Shifts to the U.S. in 2017

- Market share for visits increased for the Northeast and New England, especially NYC and Boston. Market share also increased for the East South Central census region and West South Central census region and for Texas (both

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Dallas and Houston), Atlanta, and North Carolina. In contrast, the West Coast destinations and the Mountain Census region's market share declined in 2017.

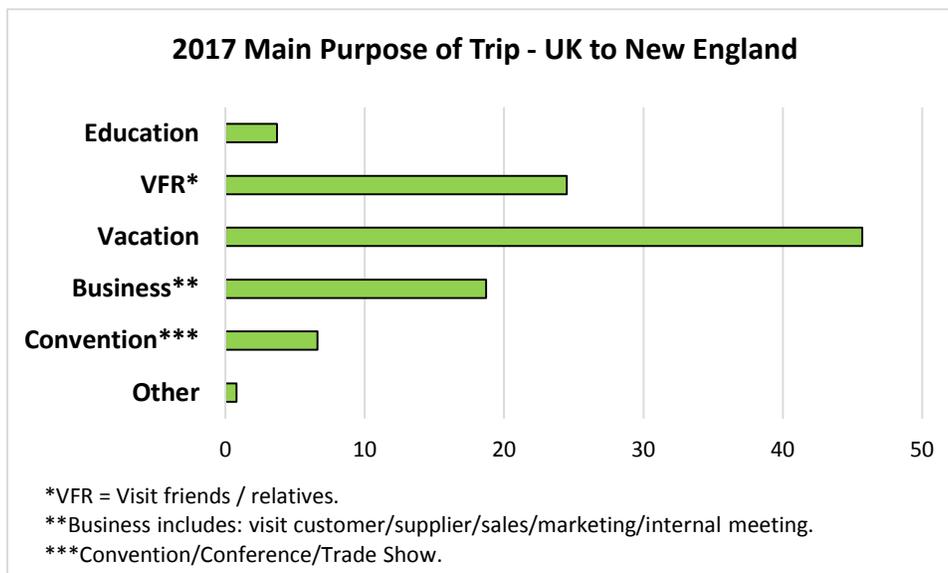
- Cost of travel has increased for Chinese visitors to the U.S. due to the exchange rate. The market also continues to mature as Chinese travelers are seeking more than shopping tours and focusing more on experiencing interesting places.
- Length of stay increased to 42.5 nights (influenced by students). However, normalization of the major holiday periods continues to result in a shorter visit to one or two destinations rather than a tour of the country's icons. Growing demand for domestic travel on key holidays is also a concern.
- Leisure and Education travel contracted as a share of visits. VFR, Convention, and Business travel increased.
- First-time visitors decreased and package travel decreased.
- The percent visiting only one state increased, as did visiting only one destination.



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United Kingdom Visitors to New England in 2017

- In 2017 292,000 British residents visited New England.
- The UK is the region's second largest visitor market.
- UK visitors in 2017 spent nearly \$616 million USD in total direct spending while traveling throughout New England.
- UK visitors spent an average of 10.0 nights in New England.
- The majority (71%) stayed in hotels, averaging 6.9 nights.
- Arrivals increased 9.0 percent. By comparison, U.S. arrivals from the UK declined -2.3 percent.
- The region's market penetration increased to 6.51% of all UK visitors traveling to the U.S., up from 5.84% in 2016.
- Market share increased 0.67 percentage points.
- The increase in UK visits is due, in part, to an increase in leisure travel from the UK to the United States.



United Kingdom Leisure Visitors to New England in 2017

- In 2017 175,000 UK visitors were visiting for leisure.
- Leisure visitors accounted for the majority (60%) of UK visitors to New England in 2017.
- Visitors spent an estimated 9.9 nights in the region.
- Leisure visits, as a share of total visits, increased 0.65 percentage points for New England in 2017.
- Just over one third (35%) of the leisure visitors listed VFR as a multiple purpose of trip in 2017 (down from 36% in 2016).

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Note: a leisure visitor includes all travelers that indicated their purpose of trip was for a vacation and/or part of their trip was for a vacation mixed with another trip purpose.

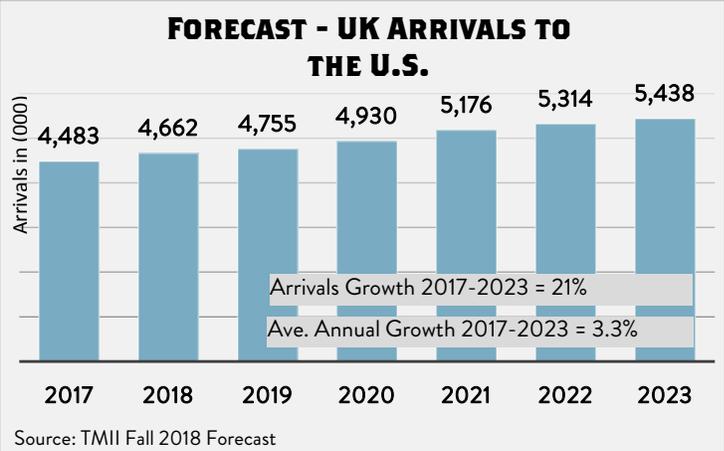
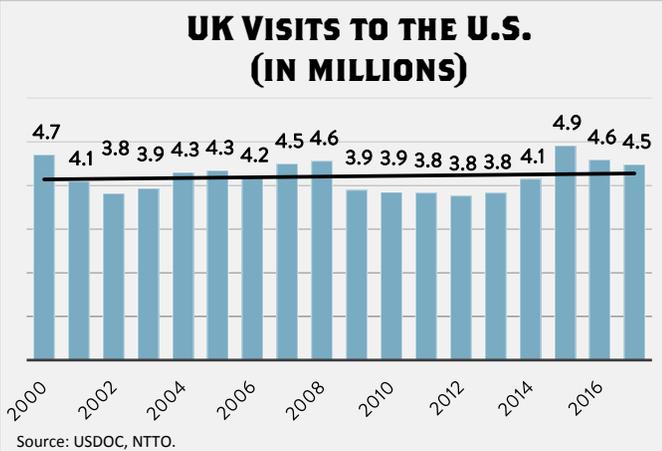
United Kingdom Visitors to the U.S. in 2017

- In 2017 4.48 million UK residents traveled to the United States.
- Visitation decreased by -2.3% in 2017, losing -104,000 visits.
- The UK is the top overseas visitor market, accounting for 11.52% of total overseas visits to the United States. However, the UK share contracted from 12.03% of total overseas visits in 2016.
- The UK ranked as the top market, by volume, for vacation visitors (main purpose).
- The UK's share of total international visitors decreased in 2017 to 5.83%, down from 6.00% of all visits in 2016.
- The UK is the fifth largest national economy in the world by GDP and ninth largest by purchasing power.
- Brexit breakthroughs are likely before the deadline regarding the most contentious concerns, which will result in the Pound Sterling stabilizing and likely rebounding at least in the short term.
- Visits through the first quarter were up 9.1%, with Easter holiday travel happening mostly in March 2018. Visits through May 2018 were pulled back down to register a -2.4% decline year over year.
- Visitation from UK visitors to the U.S. is forecast to increase 21%, at an average annual rate of 3.3% between 2017 and 2023, to reach 5.4 million by 2023.

Key United Kingdom Market Shifts to the U.S. in 2017

- In 2017 visitation to the U.S. mainland was steady as a share of visitors. New England as a region regained market share including both Massachusetts and Boston. Other key cities that registered market share gains included Orlando, Houston, Philadelphia, Fort Lauderdale, and Honolulu. In contrast, the Mid-Atlantic region registered a decline in market share, including New York City and New Jersey. Demand also shifted down for California's major destinations, Las Vegas, Arizona, Atlanta, Chicago, and North Carolina.
- Length of stay decreased by 1.6 nights (12.8 nights from 14.4 nights).
- Leisure and Business travel decreased as a share of visits. VFR, Education, and Convention travel increased.
- First-time visitors increased and package travel increased.
- The percent visiting one state increased and the percent visiting one destination also increased.

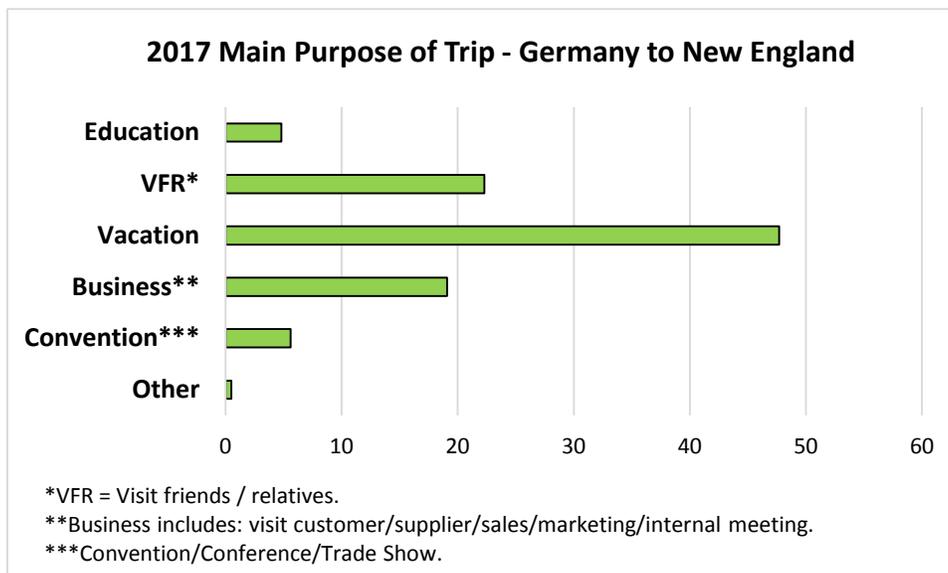
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German Visitors to New England in 2017

- Germany is the third largest overseas visitor market for New England.
- In 2017 148,000 German visitors traveled throughout the region.
- Total direct spending by German visitors in New England was \$222 million USD.
- German visitors spent an average of 9.0 nights traveling within the region.
- The majority (63%) of the German visitors to the region were leisure visitors.
- The top activities included: shopping, sightseeing, visiting small towns, and enjoying historical places.
- Over half of the German visitors (54%) rented a car to travel throughout the region.
- German visitors to New England traveled to 2.7 states, on average, during their 20 night stay in the United States.
- Boston was the top port of entry (50%) for German visitors traveling to New England, followed by New York City ports (21%).
- Downturn in Visits: In 2017 both visitors and market share contracted. Arrivals decreased from 170,000 in 2016. Market share contracted -1.21 points to register 7.10% of all German visitors to the U.S., down from 8.31% in 2016. The downturn in visits is attributed to a shift in demand toward the Western United States.



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German Leisure Visitors to New England in 2017

- In 2017 93,000 German visitors traveled for leisure.
- Leisure visitors accounted for the majority (63%) of German visitors to New England in 2017.
- Leisure visitors spent an estimated 6.4 nights in the region.
- Over two fifths (43%) of the leisure visitors listed VFR as a multiple purpose of trip in 2017.
- Car rental was the highest compared to all other markets (67%), which was associated with the highest share visiting small towns and countryside (68%).

Note: a leisure visitor includes all travelers that indicated their purpose of trip was for a vacation and/or part of their trip was for a vacation mixed with another trip purpose.

German Visitors to the U.S. in 2017

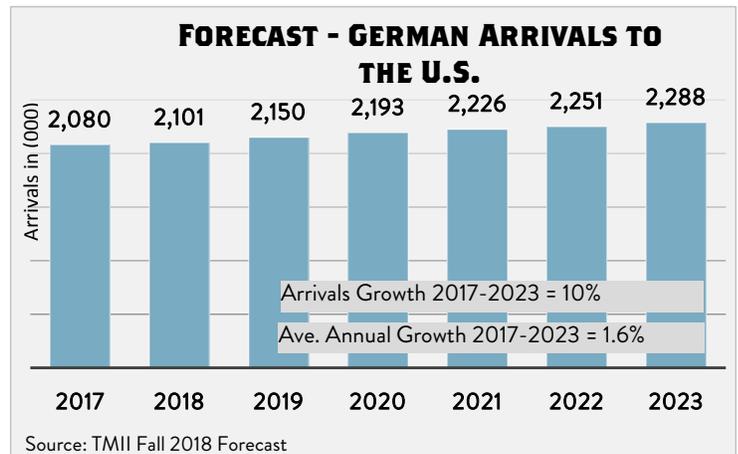
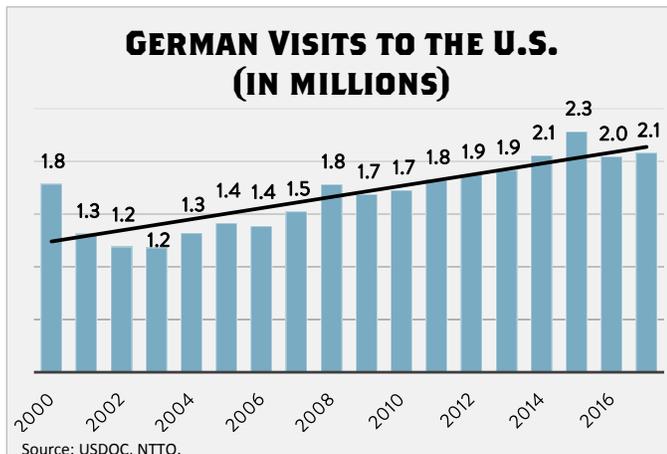
- In 2017 2.08 million German residents traveled to the United States.
- Visitation increased 1.7% in 2017, gaining 34,000 visits.
- In 2017 Germany ranked as the fifth largest overseas market, accounting for 5.35% of total overseas visits to the United States. However, the German share contracted from 5.37% of total overseas visits in 2016. Germany dropped from fourth to fifth due to South Korea's increase.
- Germany ranked as the fifth largest market, by volume, for vacation visitors (main purpose).
- Germany's share of total international visitors increased in 2017 to 2.70%, up from 2.68% of all visits in 2016.
- Germany is the fourth largest national economy in the world by GDP and fifth largest by purchasing power.
- Visits from Germany through the first quarter were up 4.2%, however, Easter holiday travel was predominantly in March. Through May 2018 visits to the U.S. are down -3.7%. On a positive note, German tour operators projected growth between 1-3% for 2018 in the German Travel Trade Barometer.
- Visitation from Germany to the U.S. is forecast to increase 10%, at an average annual rate of 1.6% between 2017 and 2023, to reach nearly 2.3 million by 2023.
- The strong uptick in trade led to a stronger Euro in 2017. In 2018 concerns over trade disputes impacted Europe's largest economy. Growth is expected to be only 1.8% in 2018 and 2019, a downgrade from previous reports (2.1%). The lower rate of growth stems from concern for a slowing global economy and economic concerns in Turkey and Argentina and other emerging markets. Concerns going forward include the stability of the EU including the outcome of Brexit, Italy's economy (government debt), and potentially some volatile political shifts. Positives include nominal wage growth along with inflation predicted to

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2% resulting in German consumers with more money in real terms (more disposable income).

Key German Market Shifts to the U.S. in 2017

- Demand (by market share shift) increased for Hawaii and parts of California (but not for some icon destinations). Florida market share declined year over year as did market share for most Northeastern destinations.
- Length of stay declined by 2.3 nights (16.8 nights).
- Business, Education, and Convention travel increased as a share of visits. Leisure and VFR travel decreased.
- First-time visitors increased and package travel decreased.
- The percent visiting one state increased and the percent visiting one destination also increased.
- Altogether, there was an increase in German visitors to the U.S., however, they visited fewer destinations during their time in the U.S. compared to 2016.



Additional Top Overseas Visitor Markets

- France rebounded in 2017 and overtook India to become the fourth largest market, with 114,000 French residents visiting New England. Visitation increased 12.9 percent. By comparison, total U.S. arrivals from France increased 1.6% compared to 2016, reflecting an increase in market share for New England from 6.18% in 2016 to 6.81% in 2017.

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- In 2017 112,000 Indian residents explored New England. Arrivals were flat over 2016 and market share decreased to 8.73% in 2017 from 9.29% in 2016 – the third largest market penetration of any top visitor market, just behind China (11.98%) and Ireland (10.15%). It should be noted that growth in India is focused more on student travel/education, visiting friends and relatives, and business; with few traveling for a vacation.
- In 2017 90,000 Brazilian residents traveled to New England. Brazilian visits to New England increased 18.4 percent. By comparison, total visits to the U.S. increased 10.8 percent. The end result is New England market share increased from 4.43% in 2016 to 4.69% in 2017. The Brazilian market is a diverse mix of vacation, visiting friends and relatives, education, and business and convention travel.
- Visits from the remainder of the top overseas visitor markets to New England were mixed in 2017. Italy and South Korea registered increases in both market share and visits while Japan, Scandinavia, and Australia registered decreases in both market share and visits. Visitation from Ireland increased but at a slower rate than the U.S. resulting in a contraction in market share by 0.1 percentage points.

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Selected Highlights Table

2017 Selected Highlights for Overseas Travelers to New England												
	Overseas	UK	UK Leisure	Germany	Germany Leisure	Australia	France	Brazil	Japan	China	Italy	Scandinavia
Estimated Travelers	2,214,000	292,000	175,000	148,000	93,000	57,000	114,000	90,000	68,000	380,000	67,000	59,000
% Change	6.3%	9.0%	12.2%	-12.9%	-15.5%	-20.8%	12.9%	18.4%	-16.0%	27.5%	39.6%	-10.6%
Market Share	5.69%	6.51%	5.18%	7.10%	6.40%	4.33%	6.81%	4.69%	1.90%	11.98%	6.46%	4.58%
Total Spend	\$7,114,438,027	\$615,750,078	na	\$222,399,460	na	\$199,452,124	\$223,235,023	\$270,368,185	\$155,026,580	\$2,130,478,804	\$104,788,374	na
Spend/stay	\$3,214	\$2,110	na	\$1,506	na	\$3,480	\$1,966	\$3,014	\$2,269	\$5,603	\$1,572	na
Spend/night	\$243	\$211	na	\$167	na	\$395	\$226	\$144	\$349	\$273	\$281	na
Nights in New England	13.2	10.0	9.9	9.0	6.4	8.8	8.7	20.9	6.5	20.5	5.6	9.4
Hotel use	65.3%	71.3%	74.2%	74.5%	72.0%	78.8%	76.6%	49.9%	82.0%	62.6%	66.7%	73.0%
Nights in hotel	9.8	6.9	8.3	6.7	4.9	7.2	8.0	18.3	4.1	15.1	3.1	7.3
Share of nights in hotel	74.2%	69.0%	83.8%	74.4%	76.6%	81.8%	92.0%	87.6%	63.1%	73.7%	55.4%	77.7%
Room-nights	9,445,514	957,702	633,974	461,714	164,052	202,122	465,728	587,038	134,480	1,890,520	81,492	209,607
Nights in U.S.	25.1	17.8	18.1	20.2	18.3	25.7	16.9	28.3	12.5	35.8	13.6	19.2
NE share of nights	52.6%	56.2%	54.7%	44.6%	35.0%	34.2%	51.5%	73.9%	52.0%	57.3%	41.2%	49.0%
Purpose of Trip (Multiple Purposes Possible)												
Leisure	57.4%	60.0%	100.0%	62.8%	100.0%	84.4%	59.3%	59.3%	31.1%	55.1%	67.1%	47.0%
Visit Friends & Rel.	42.0%	37.6%	35.2%	39.6%	43.2%	48.4%	36.6%	42.2%	34.9%	34.5%	30.0%	38.5%
Business	19.0%	20.7%	5.0%	23.9%	2.9%	4.7%	24.7%	8.5%	31.1%	17.0%	22.7%	26.2%
Convention	12.2%	8.3%	2.3%	10.1%	4.5%	13.3%	10.6%	12.5%	36.4%	10.2%	12.9%	15.7%
Historical places	44.1%	49.8%	63.5%	55.9%	68.7%	63.7%	42.6%	44.6%	25.9%	40.0%	43.3%	41.2%
Shopping	86.0%	83.4%	89.6%	89.1%	91.1%	90.9%	87.2%	85.6%	73.1%	90.6%	84.4%	89.3%
Small towns	45.4%	54.1%	63.7%	56.8%	67.3%	59.5%	51.1%	29.0%	18.7%	40.4%	41.8%	52.4%
Art Galleries/Museums	47.7%	44.7%	54.7%	44.7%	51.4%	67.8%	60.6%	41.1%	51.6%	59.4%	51.0%	32.7%
Car rental	29.9%	30.8%	34.3%	54.1%	66.8%	35.6%	42.2%	24.9%	14.6%	24.0%	29.1%	33.6%
Boston port of entry	37.8%	60.8%	58.0%	49.6%	40.0%	7.8%	51.2%	6.5%	32.6%	26.6%	51.7%	60.5%
New England Main Dest.	66.8%	75.1%	64.7%	60.8%	41.5%	53.6%	55.3%	74.7%	81.8%	65.6%	50.2%	80.6%
States visited	2.4	2.1	2.5	2.7	3.4	3.3	2.5	1.9	1.9	2.7	2.5	1.8