



WELCOME!

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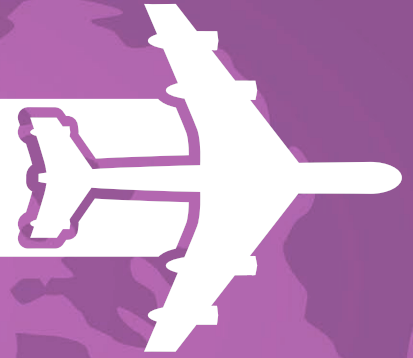
Canada

China

Japan

Mexico

United Kingdom



WELCOME!

INTERNATIONAL VISITORS



WE SHARE
THE STATE OF AFFAIRS

In 2003, with the exception of the Global Financial Crisis of 2009, the United States began enjoying strong and steady growth in both inbound international visitation and spending. In the last decade, the number of inbound travelers has nearly doubled from roughly **four million to seven million**, while spending has increased by **50%** in the same time period, up to **\$251.4 billion**. International travelers vacation for significantly longer periods of time. According to the World Travel & Tourism Council, travel and tourism accounted for **8.1% of America's total GDP** at \$1,509.2 billion, with the industry directly and indirectly supporting over 14 million jobs. However, after years of double-digit growth, the growth in annual spending is decelerating, from **14% in 2008**, to **7% in 2012**, and to **2% in 2017**, while annual visitation to the U.S. began to decline in 2015 – and has yet to stop. According to

Bloomberg, America is one of two out of the top dozen global destinations to see a decline in international visitors in the last three years, while at the same time our market share has dropped in nine of our ten top source markets. The number of trips made by globetrotters in **2017 grew 7% last year**, while trips to America declined by **4%**; and that **4%** means big money – **\$2.7 billion** in reduced spending, according to Tourism Economics. Foreign tourists generally spend four times as much as domestic tourists, according to the U.S. Travel Association, directly supporting **1.2 million** American jobs and nearly **\$32.4 billion** in wages. Looking north in 2017, Canada welcomed **4% more inbound visitors**, while to the south Mexico's visitation increased by **12%**, "driven by increasing demand from the United States," said *the United Nations World Tourism Organization (UNWTO)*.

Change in Visitation to Each Country from 2015 to 2017





DON'T DESPAIR **THE STATE OF AFFAIRS**

*“Railroad experiences over long distances.
Traveling across the country on the iconic highways.
Experiencing unique wildlife.”*
UK, authentically American



BRAND USA, a non-profit private partnership, is funded by donations from more than 700 organizations and matched fees international travelers pay to the **Electronic System for Travel Authorization (ESTA)** program. The organization, whose mission is to attract international travelers to America, was found by Oxford Economics to have brought **4.3 million more visitors** who spent **\$13.6 billion more**, and generated nearly **\$4 billion** in additional federal, state, and local taxes over the last four years. In the face of these recent inbound travel trends, the “Visit U.S. Coalition” was made up of ten of the Nation’s most prominent tourism organizations.** **Brand USA** launched two marketing campaigns to attract international interest in visiting the United States, such as...

“ONE BIG WELCOME,”

a series of installations at major inbound airports welcoming foreign travelers; and

“ASK A LOCAL,”

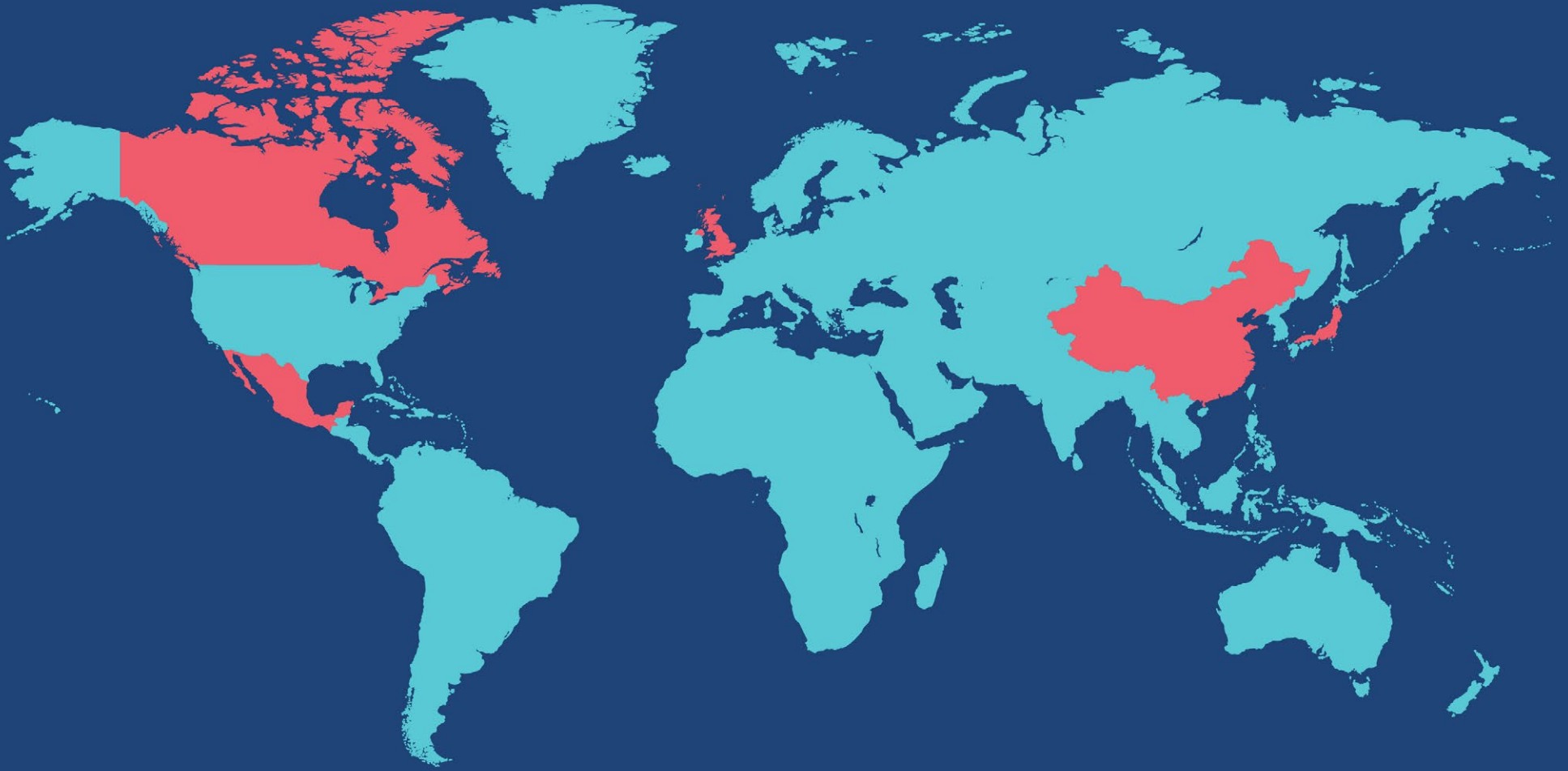
a video series aimed at providing authentic insights into top American markets.

Major tourism markets New York and Los Angeles launched their own internationally-targeted, multi-million dollar tourism campaigns such as “True York City” and “We Welcome Everyone.”

So what are we doing about it?

***The American Gaming Association, American Hotel & Lodging Association, American Society of Association Executives, Asian American Hotel Owners Association, International Association of Exhibitions and Events, National Restaurant Association, National Retail Federation, Society of Independent Show Organizers, U.S. Chamber of Commerce, and U.S. Travel Association.*

Five Greatest Feeder Markets to the United States
Canada, Mexico, Japan, China, and the United Kingdom



REPRESENTING **65%** OF TOTAL INBOUND TRAVEL

We here at PGAV deeply hold a confident conviction that America is full of breathtaking vistas and unmatched destinations, and that we can only be better by helping to share them with the world. Decisions without data carry inherent risk; and at times, can be outright irresponsible. It is one of our continuing creeds to reduce risk and empower success for our readers and clients as much as possible. Over the last several years, from the US Council of Mayors to the American Alliance of Museums to the Southeast Tourism Society and beyond, we've heard impassioned requests for insights into what international visitors think and what they're doing when they enter The Melting Pot; and to date, we couldn't find a precedent. Therefore, we've once again collaborated with our longtime partner **H2R Market Research** to **survey 985 travelers** who have visited America, are considering visiting our country, or who live here to explore inbound travelers' behavior, motivations for

visitations, barriers, and feedback on visiting the United States. Leveraging a professionally managed email panel and online survey methodology, **75% international visitors and 25% Americans** were screened to ensure they were attraction visitors, household decision makers, and have visited America or have considered doing so. We selected the five greatest feeder markets to the United States - **Canada, Mexico, Japan, China, and the United Kingdom** – together representing **65%** of total inbound travel, and translated our survey into native languages where appropriate. Lastly, we sought expert input from tourism practitioners across the country to help determine which topics to explore and how best to frame them. The insights gained from our panelists paint a picture of opportunity for tourism professionals to **better understand these guests, and create more fulfilling and enriching experiences for them.**

*International visitors to America
may be many things;
but if they are one thing, they are*

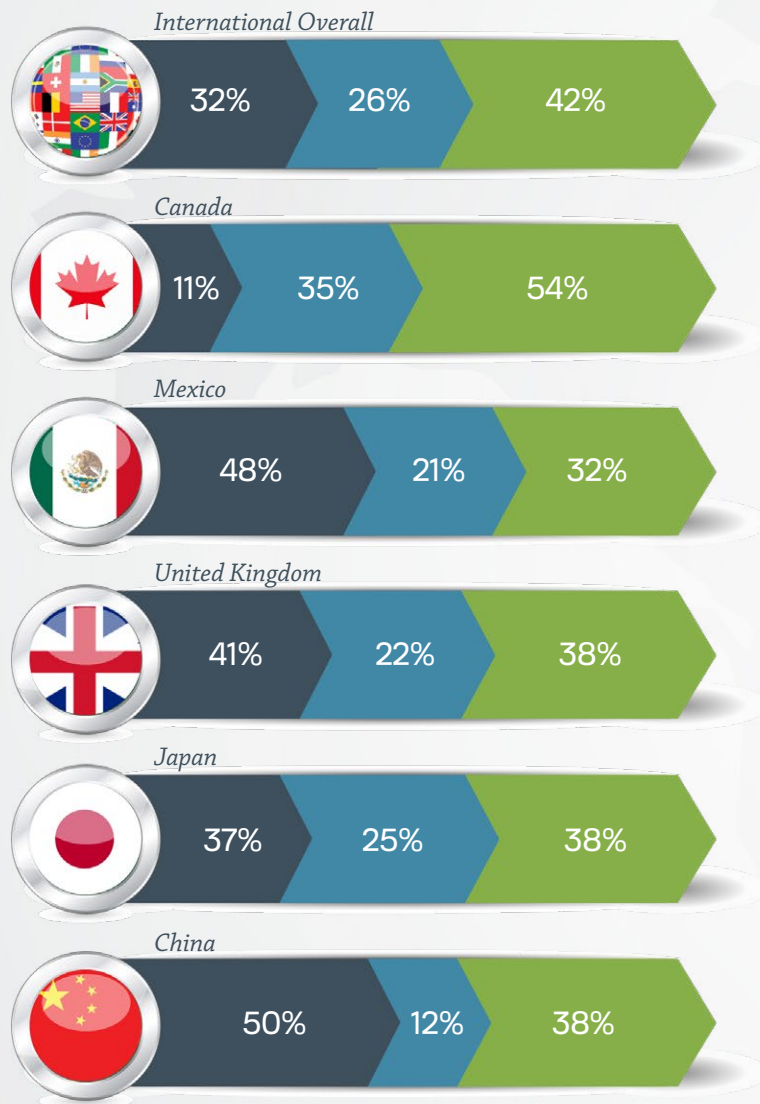
WELCOME!

A PASSPORT OF EXPERIENCE

A satisfied, repeat customer is always easier to reacquire than starting from scratch; and fortunately, **68% of our international panelists** have visited America before. Canadians lead the way with **89%** of them having visited, most likely due to physical and cultural proximity, a large population, and a long and relatively crossable border. Coming in at second with **63% are the Japanese**; who, as Danielle Demetriou of *The Telegraph* explains, enjoyed an economic post-war boom that fueled the start of overseas travel, and have garnered an international **“reputation for being among the world’s most well-dressed, tidy, punctual, and polite of travelers.”** At least half of our respondents from the **UK (59%), Mexico (52%), and China (50%)** have all visited as well.



UNITED STATES MARKET POTENTIAL



With the exception of Canadians, the other four countries have significant portions of people who have yet to visit the States, but are definitely considering it. As previously mentioned, **Canadian considerers are most likely low due to proximity** – and having easily visited already. While all of these travelers should be considered prospects, those currently thinking about visiting America are prime targets, just needing the right push, travel package, or allure to bring them over seas and across borders. Interestingly enough, **China has the largest ratio of recent visitors compared to overall visitors (in the last five years)**. Notes the Council on Foreign Relations, the recent, explosive growth in the Chinese middle class, coupled with significant American efforts in 2016 to woo Chinese visitors – such as hotels adding cultural amenities, introducing Mandarin materials at popular national parks, and reductions in VISA processing times – may have all contributed to recent Chinese travel to America. Even an immensely popular Chinese romantic comedy, 2013’s *Finding Mr. Right*, has been directly attributed to an increase in Chinese tourism to Seattle, Washington – the film’s setting.

When these travelers hit American shores, they visit **2.2 different cities or towns** during their time here, with those from **Mexico and the UK visiting 2.6 and Canadians 1.8** (as it’s much easier for them to come back). Roughly half of those respondents noted they had visited that city or town before, with Chinese guests as the outliers – **with only 22% being repeat visitors** (most likely due to the long travel time, and wanting to see something new for their Yuan). Future intent to visit the States is significantly higher among travelers from **Mexico (74%), China (73%), and Canada (69%)**, while travelers from the **UK (53%) and Japan (46%)** are less likely to visit in the next five years.



THE DRIVE TO TRAVEL

When considering visiting somewhere in America, international travelers have an unsurprising list of top priorities, such as **somewhere safe, wholesome, welcoming of other cultures, and a diversity of things to see and do in close proximity.** Interestingly enough though, out of 15 different tested options, two of the lowest priorities are offering language interpreters/translation services and a destination that offers culturally-sensitive amenities. While both considerations certainly still influence decision-making, perhaps visitors are inherently looking for something that stretches their comfort zones and isn't so culturally familiar. It's exciting to explore a different, new land.

In the next five years, don't be surprised to see the highest concentration of international guests at **theme parks (66%), historic landmarks and places (68%), and shopping (72%)** – as those are the three activities most likely to be pursued by these travelers. In fact, these three activities appear in the top five intended activities across all five countries. Conversely, international guests are least likely to want to visit professional **sporting events (37%), universities (21%), and business conferences (17%). Mexico (63%) and China (66%)** both exhibit the highest intent to visit American attractions in the next five years, while our other three respondent countries hover around **40%**; *Japan 41%, United Kingdom 38%, and Canada 35%.*

IMPORTANCE WHEN TRAVELING TO THE UNITED STATES

88%

Offers diverse selection of activities and attractions to choose from nearby

87%

Is a safe place that has a wholesome atmosphere

86%

Is a place that is welcoming to visitors from other countries

81%

Local transportation options that would enable us to conveniently travel from one city to another

80%

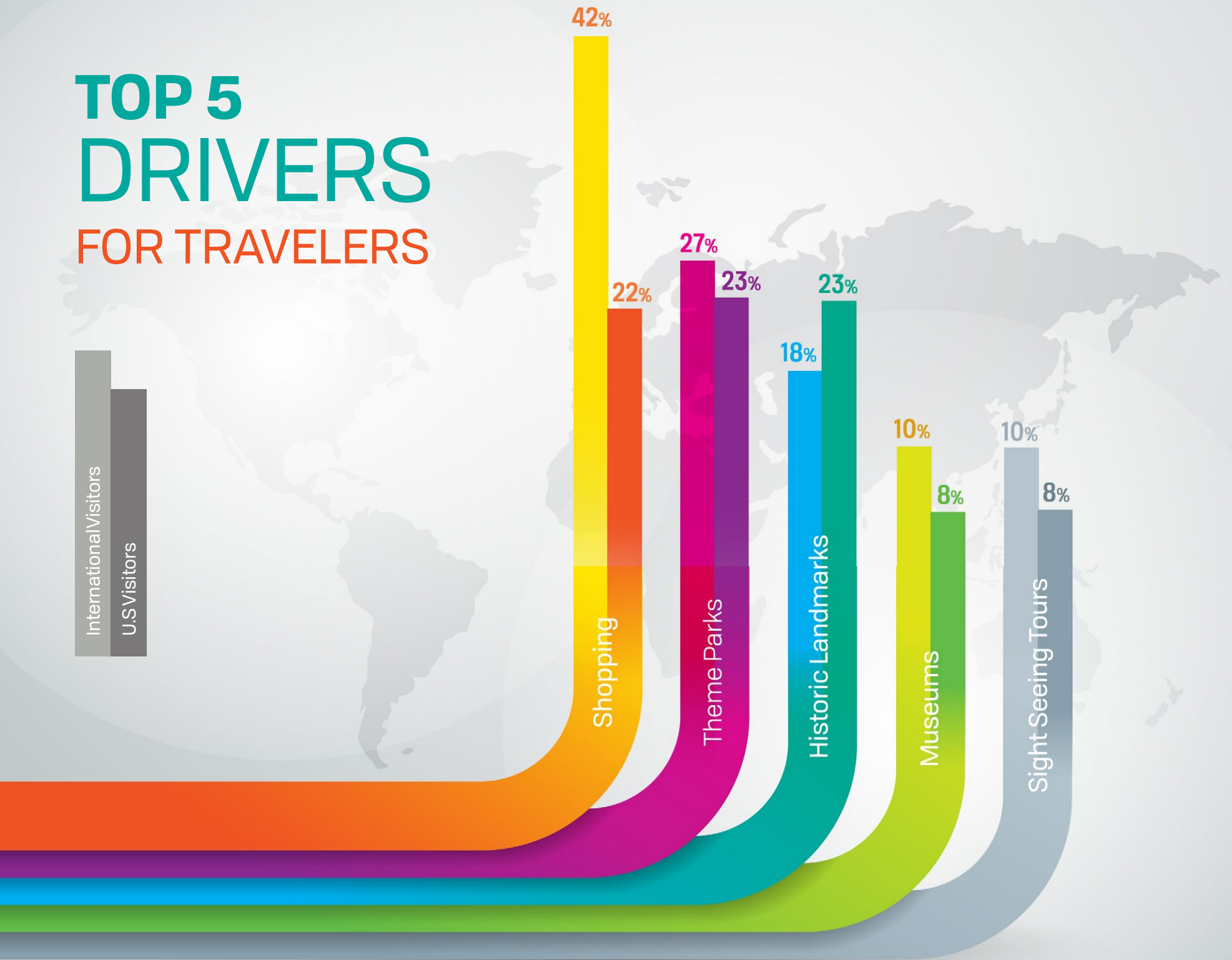
Has public transportation that is easy to use

80%

Provides a unique experience that is out of the ordinary in some way

TOP 5 DRIVERS FOR TRAVELERS

International Visitors
U.S. Visitors





For those international visitors who have already visited America, leisure – such as a getaway, reunion, or vacation – came in as the top motivator at **65%**, distantly followed by visiting friends and relatives living in the US (**15%**) or visiting a specific attraction (**7%**). Of important note is that Chinese travelers are **12% points** more likely than the average to visit America for leisure, while Mexican travelers are **12% points less likely**.

Perfectly aligning with the intentions of future visitors, international travelers who have already visited America listed theme parks, historic landmarks and places, and shopping as the activities that had the most influence on determining which destination to visit in the US. Shopping was exceptionally far out in front with **42%** noting it was the most influential, with the second-most influential – theme parks – coming in at **27%**. We will explore this shopping phenomenon in further detail in just a few chapters.

Emotionally-speaking, these visitors had THREE CLEAR ELEMENTS that inspired them to travel to America:

- Having a variety of things to see and do
- Trying something they couldn't do on a daily basis
- Finding somewhere they could all have fun together.

American residents aligned rather closely on the first two motivators, but were less likely to be looking for family events or points of relaxation than their international counterparts were.

RESEARCH.
RESERVATIONS.
REVIEWS.



Many of us dream – sometimes on a daily basis – of visiting far off and exciting lands; but when it comes time to actually make these dreams reality,

HOW DO OUR INTERNATIONAL COMPATRIOTS GO ABOUT MAKING IT HAPPEN?

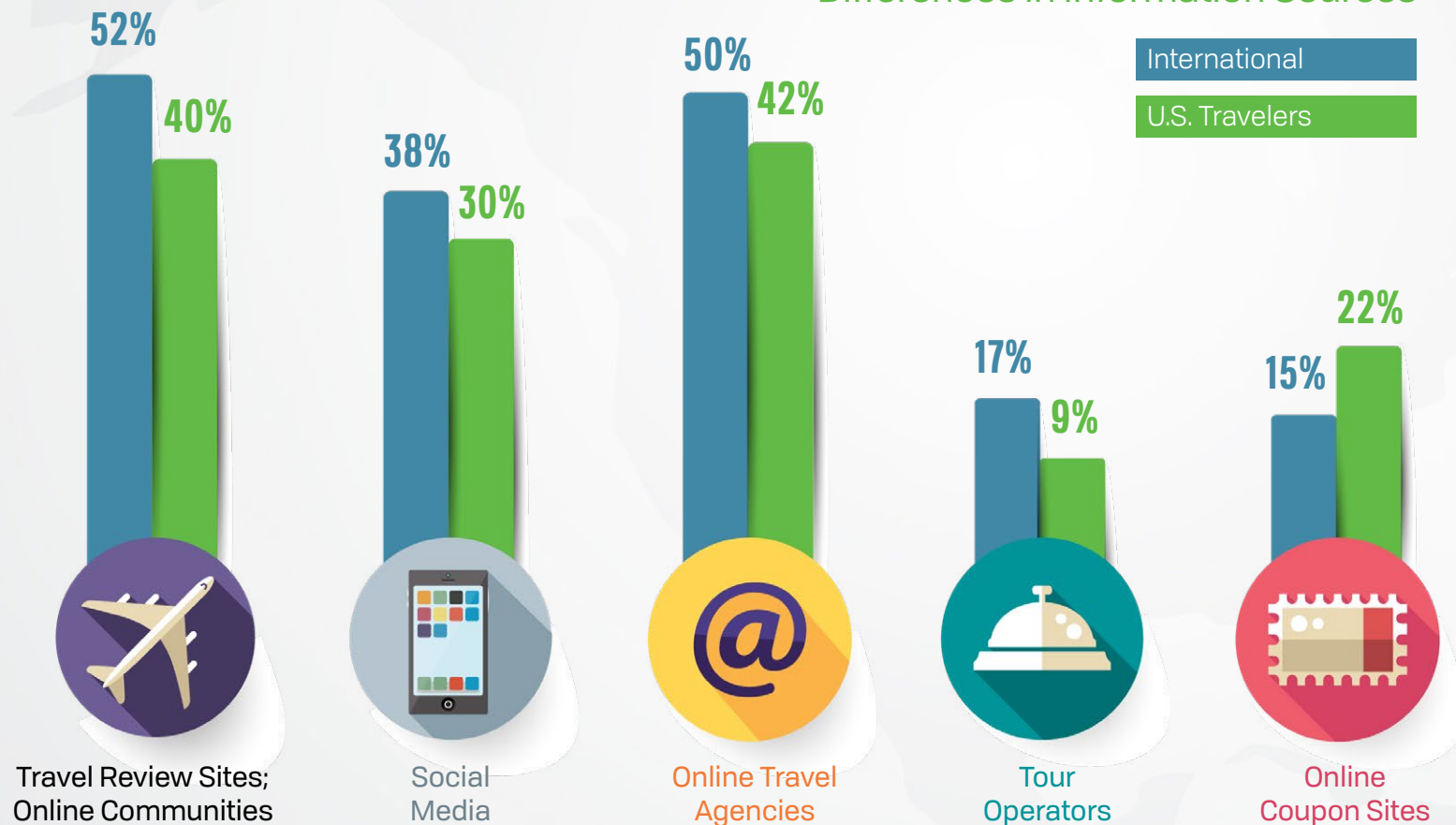
In our study, **72% of travelers** first pick the American city or town they'd like to visit, then explore the activities, attractions, or events within that destination. This statistic is relatively stable for four of the five countries, with China as

the outlier as **47% of Chinese visitors** to America consider the attractions, activities, or events first – regardless of the city or town.

In researching these destinations, your tried-and-true internet search is the top information source, with **63% of travelers** using engines like Baidu in China and Japan, and Google remaining champion for Mexico, Canada, and the UK. Just about half of all international visitors incorporate word-of-mouth, travel review sites, and online travel agencies in their American-trip planning as well.

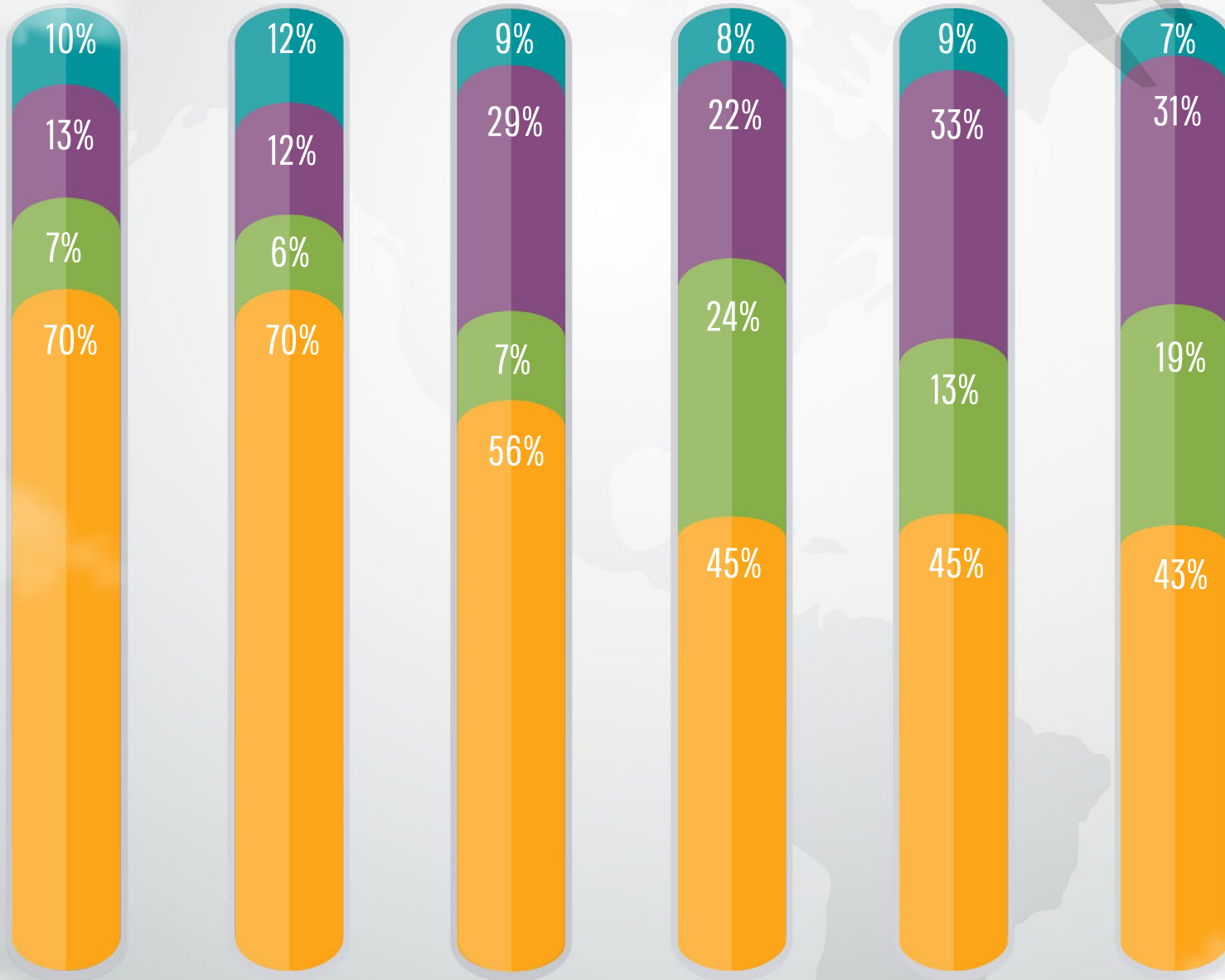
TOP 5

Differences in Information Sources



TRAVEL PLANNING

Among International Travelers



Hotels Where You Will Stay

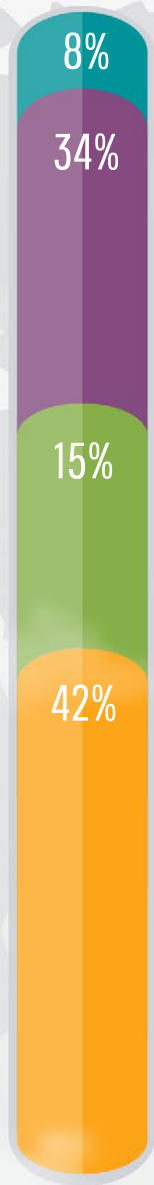
Arrival Airport

Cities You Will Visit

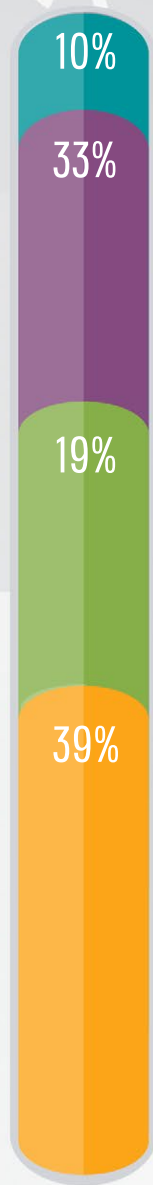
Local Transportation You Will Use

Attractions And Activites You Will Visit

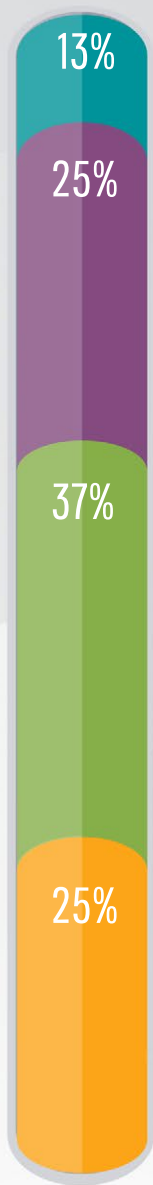
Travel Distance From Main Destination



Tours And Itineraries Of Sites



Events You Will Attend



Public Transportation Passes



Restaurants Where You Will Eat



Unsurprisingly, major logistics are shored up prior to departure - such as hotels, flights, and destination cities.

These travelers are far less likely to commit to restaurants and public transportation passes – more willing to discover these throughout their adventure as locals recommend them or they spontaneously discover them along their path.

As a destination manager, you may want to do a deep internet dive to ensure that your attraction is listed in any summary tourism sites about your city or town, and of course well-celebrated and a top-priority on them. Additionally, you could reengage your website manager for a thorough updating of your website's SEO strength, with **internet search such a top research tool for international guests.**



THE AMERICAN BRAND



When you think of visiting China, visions of the Great Wall and Beijing's Olympic Park may come to mind, while Big Ben, Parliament, and bright red double-decker buses are immediately recognizable when considering the UK. **What American icons come to mind for our panelists as they consider vacationing here?**

When given a list of 54 unmistakably American attractions, only three were familiar to at least two thirds of our panelists: **Disneyland (66%), Disney World (70%), and the Statue of Liberty (66%). 98%** of international travelers were

familiar with at least one American icon, but familiarity varied widely by country. Generally speaking, visitors from Canada, the UK, and Japan have higher familiarity with all American icons, while more are unrecognizable to those from Mexico or China. Canadians were far more familiar than average with Niagara Falls, Las Vegas, and the Golden Gate Bridge; the UK and Japan well beyond average with Niagara Falls and the Grand Canyon; and China and Mexico significantly lower with top icons like New York City and Las Vegas.

TOP 15

Familiar American Icons



70%

1. Walt Disney World
Orlando, FL

62%

5. The Grand Canyon
Arizona

53%

9. Golden Gate Bridge
San Francisco, CA

39%

13. Northern Lights
Alaska

66%

2. Statue of Liberty
New York City, NY

57%

6. New York City
New York

53%

10. Universal Studios
Orlando, FL

37%

14. Houston Space Center
Houston, Texas

66%

3. Disneyland
Anaheim, CA

57%

7. Hollywood
California

48%

11. Super Bowl
Various Locations

37%

15. Kennedy Space Center
Cape Canaveral, FL

64%

4. Niagara Falls
New York

55%

8. Las Vegas
Nevada

39%

12. Pearl Harbor
Hawaii

NEW JERSEY BALLOONING FESTIVAL

Whitehouse Station, New Jersey

*“To experience the cultural features of a place, with
beautiful or unique natural environment.”*

China, authentically American

However familiar these icons may be, their perceived value by international guests may be in jeopardy. **The Pew Research Center** cites that we're currently in a crisis they're calling "the tarnished American Brand." In the last three years, the global median favorable view of the United States has **dropped from 64% to 49%**; and in more than half of the 37 surveyed countries, that favorable view dropped by double-digits in 2017. From their study, **43%** of Canadians view America favorably, **50%** of residents from the UK, **57%** Japanese, and **less than a third (30%)** of Mexicans (a drop from 66% just a few years ago). Pew notes that America's image is strongest among young adults; in 16 of the countries surveyed last year, those ages 18 – 29 have a more favorable view of the US than people 50 and older. Additionally, internationals who self-identify as more to the political right and/or men generally have a more favorable view of America.

One of the greatest surprises from our study is that less than half of our American respondents strongly agreed that America has authentic small town charm, friendly people, is

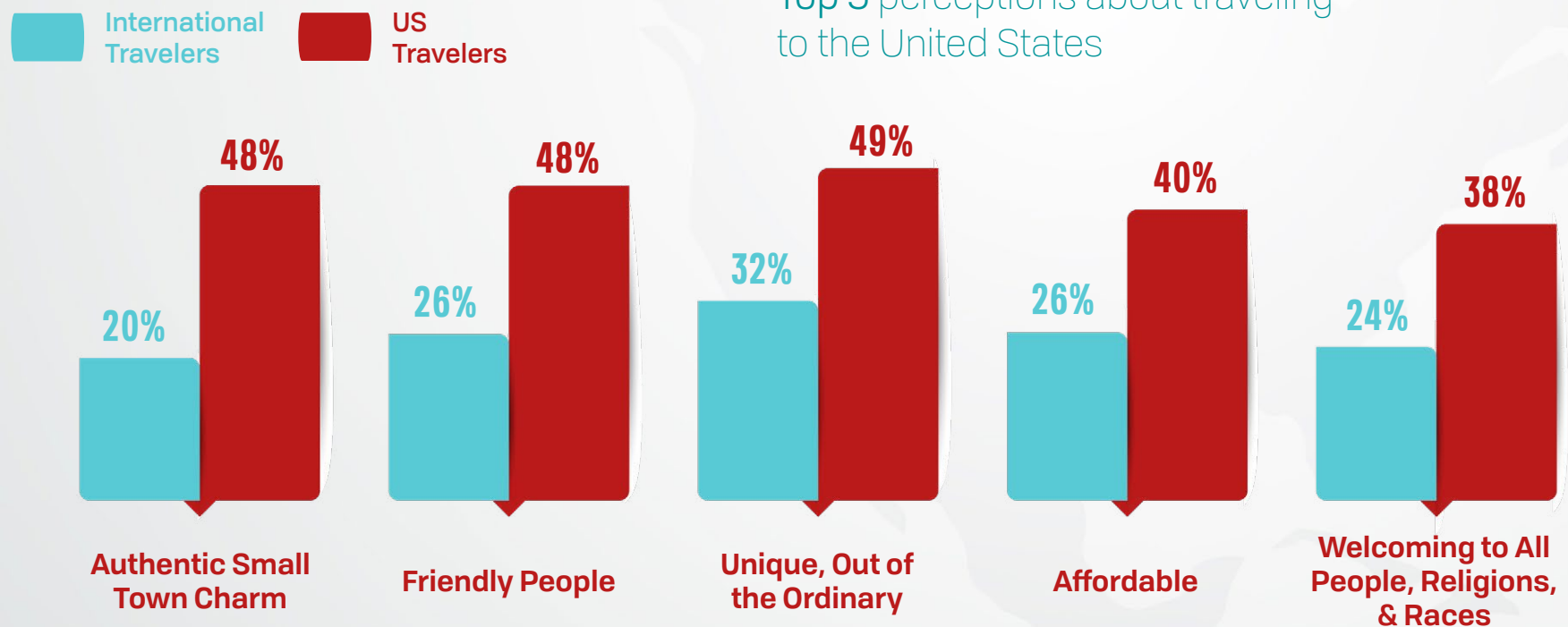
unique and out of the ordinary, is affordable, and is welcoming to everyone – tolerant of other people, religions, and races. Our international respondents disagreed with these brand assets even further than Americans by double digits.

The Pew study *does* give a glimmer of hope and good news. First, "whatever their views of the United States and whoever sits in the White House, global publics have often maintained a favorable impression of Americans." According to the report, a **median 58%** in 37 nations say they look favorably on Americans. Additionally, U.S. movies, music, and TV remain popular aspects of the American brand – **with half or more of the 37 nations** saying they like US cultural products.

What could be more **authentically American** than our people and our pop culture?!

TRAVELING PERCEPTIONS

Top 5 perceptions about traveling to the United States





AUTHENTICALLY AMERICAN

Just as culture is to an organization, authenticity is one of the most valuable and inimitable assets a brand can have. Authenticity is strongly associated with honesty, truth, and integrity – all essential elements of any relationship. In the *Real Potential* edition of *Destinology*, we explored Americans' perceptions of authenticity. Most notably, **80% of attraction visitors** like to visit places that are authentic – spots where something real happened in history, natural places untouched by human hands, and unique things that couldn't be done elsewhere. Natural attractions like the Grand Canyon and living history museums like Colonial Williamsburg ranked highest.

ATTRIBUTES OF AUTHENTICITY

- **UNIQUE**
Original, Artistic, Inventive, Spontaneous
- **REAL**
Historical, Natural, Landmarks
- **HUMAN**
Genuine, Trustworthy, Caring
- **NON-COMMERCIAL**
Simple, Not fake, Not glitzy, Not “out to make a buck”
- **SOCIAL/EMOTIONAL**
Bonding, Feeling closer to family/friends

A visit to the United States is inherently authentically American – catching a game at Wrigley Park, grabbing lunch at In-N-Out, or strolling Central Park – all of these are American experiences simply based on the sights, sounds, and people who populate these spaces. The most “authentically American” experiences for our international respondents can be categorized as **Food (24%), Locations and Landmarks (21%), and Leisure (18%)**.

WITHIN THE
“AUTHENTICALLY AMERICAN” RESPONSES
BURGERS, BBQ, FAST FOOD, JUNK FOOD,
SPORTS, THEME PARKS, MOVIES, AND SHOPPING

were all prime ambassadors of the American experience.

For the foodies of today, tasty treats often come top-of-mind when traveling the world – how ingredients are sourced, stored, prepared, and served tells so much about people’s community, family, values, economy, and culture. Smells of savory bao conjure warm feelings of street stalls in Shanghai, while grabbing a cob of corn covered in mayonnaise and chili pepper can make most bellies grumble and long for Dios Muertos. Unsurprisingly, technology ranked as the lowest “authentically American” asset, most likely since so much of our hardware is imported, as well as transportation – hypothetically because these other countries also have similar taxis, buses, streetcars, trains, and planes, so ours don’t stick out as clearly American. These insights may explain why campaigns like Brand USA’s “Ask a Local” have been so popular.

AUTHENTICALLY American

Top 6 experiences mentioned as Authentically American

Food



Location/
Landmarks



Leisure



Local
Life



Scenery



Identity



A satellite night view of North America, showing the continent illuminated by city lights. The lights are concentrated in the eastern and central parts of the continent, with a significant gap in lighting along the western coast. The Earth's horizon is visible at the top and bottom of the frame, with a bright blue glow from the atmosphere.

CLOSING THE COASTAL GAP

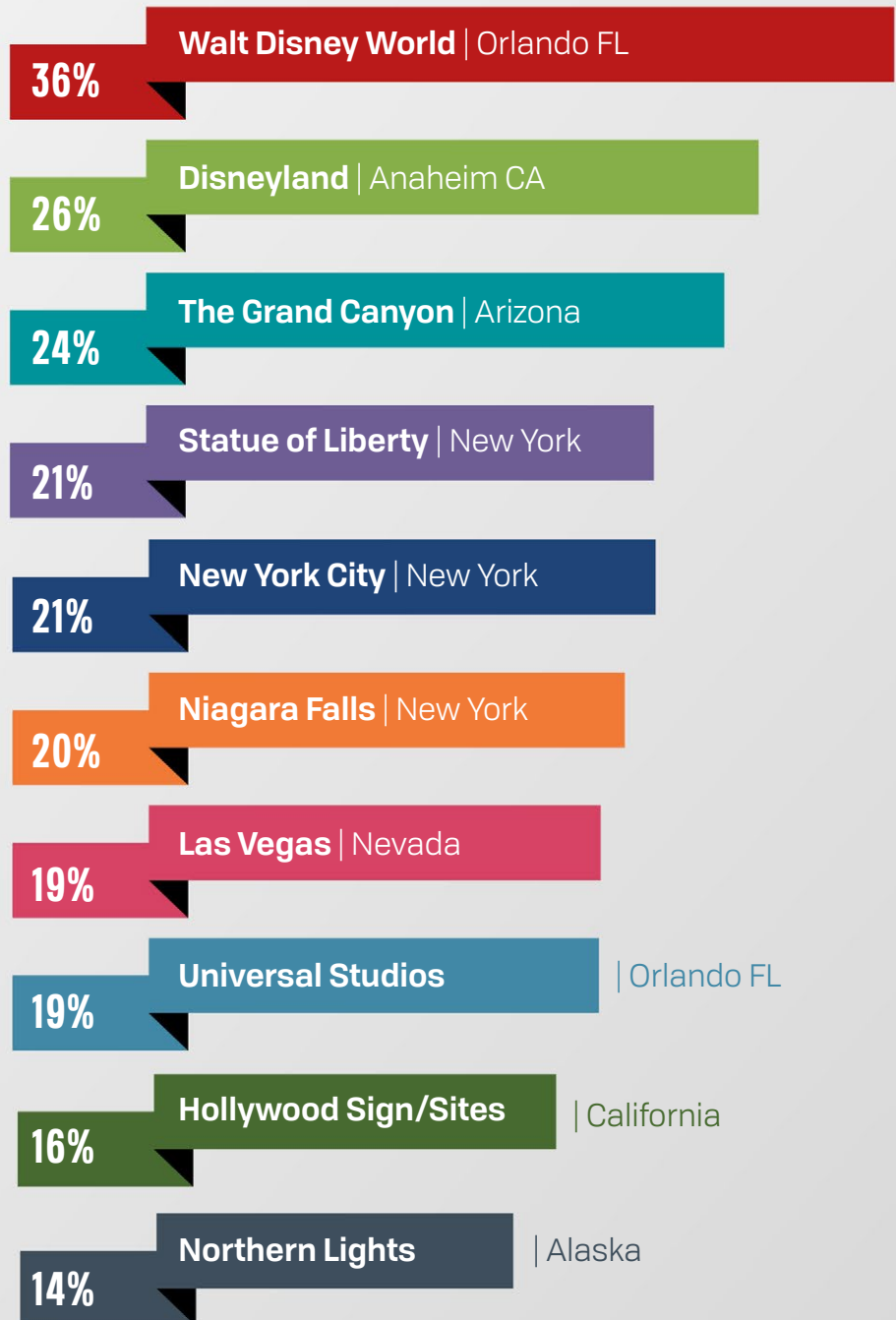
When considering visiting the United States, we asked our respondents the open-ended question of what places, attractions, activities, or events were they interested in visiting. **“Disney”** was top of mind for **27%** of them, followed by **New York City (19%)** and **Las Vegas (12%)**. We then gave our overseas friends a list of 54 attractions and asked them which ones would be most likely to inspire a trip to America. Those that topped the list were dominated by massive entertainment icons and landmark wonders, such as **Disney World, Disneyland, the Grand Canyon, New York City Icons, and Niagara Falls.**

30 OF THE 54 DESTINATIONS

———— were selected ————
by 3% or fewer of our respondents
as places likely to inspire a US visit.

TOP 10

Places Most Likely to Inspire a Visit



TOP 3 DESTINATIONS VISITED



LOS ANGELES



LAS VEGAS



ORLANDO

We followed up with our respondents who had taken a recent trip to America, and asked them where they had traveled. A similar pattern evolved to those considering traveling to the States – once people hit their point of entry, they tend not to go much further. **Los Angeles, New York City, Orlando, Las Vegas, San Francisco, and Anaheim** all topped the list, universally recognized as concentrated hubs of attractions and environments catering to tourists. What do all these top-visited or top-intended destinations have in common?

They're not far from the coast.

This trend is absolutely not unique to the States, and is actually rather easily explained. When looking at our source markets, many of their most popular cities and destinations lie on their coasts as well: the UK has London and Belfast; Mexico is home to sandy Cancun, Playa del Carmen, and Cozumel; China welcomes travelers to coastal Shanghai, Hangzhou, and nearby Hong Kong; Japan's Tokyo, Osaka, and Kyoto are all near the seas; and most of Canada's major cities lie on the coast or their southern border. These coastal

and border towns developed over centuries as ports of entry, and therefore have centuries of architectural and historic attractions, complemented by mature and robust tourism industries able to support large flows of visitors.

The challenge for many tourism practitioners in America, therefore, is how to pull these visitors deeper into the heart of the country. Since the majority of these heartland destinations rank rather low on the motivation and experienced list for these travelers, the key is to intertwine them as essential, do-not-miss opportunities with the nearest, major, coastal port of entry and interest. This may involve collaboration with major attractions in these regions, offering discounts for international visitors, short-distance travel cooperation, and emphasizing some of the top priorities/interests of international travelers in global and port-of-entry marketing efforts.

65% of international guests find “authentically American” experiences alluring; and no matter where a destination is, it can certainly promote and provide the food and leisure experiences these travelers are seeking.

A world map in a light purple color serves as the background. A trail of white footprints starts on the right side of the map, near the Pacific Ocean, and leads westward across the Americas. The footprints are arranged in a path that suggests a journey from the right side of the map towards the left side, ending near the Atlantic coast of North America. The title 'FOLLOWING FOOTSTEPS' is overlaid on the map, with 'FOLLOWING' in a dark purple box and 'FOOTSTEPS' in white text below it.

FOLLOWING FOOTSTEPS

With the exception of Mexico and Canada, it's a long journey for international travelers to the States; so they tend to stay a while once they've arrived. **On average, international travelers spend just about a week – 6.5 nights – in America once they've arrived.**

SLEEPING OVER?

Average nights spent in US, by country

At the time of writing, a one way flight from London to NYC runs eight hours for around \$200 (buy now!), with those from across the pond spending the most time in America at an **average of 9.9 nights**. Those from Japan surprisingly spend the least amount of time – **just 4.6 nights on average** – but the time vs. money trade-off for Japanese guests to America may tell that story. One can certainly get a direct, nine-hour flight from Tokyo to San Francisco – but you’ll have to offer up more than **\$4,000 – for a one-way flight!** Alternatively, these visitors can get flights for closer to \$1,000, but the one-way travel time balloons to almost 20 hours! Make that a round-trip flight, and that seems to point to a week of vacation.

In the previous chapter, we explored the cities and towns most popular with our international respondents who had traveled to America. We then followed up and inquired which specific attractions or activities they patronized within these destinations. By a shockingly large margin, **88% of travelers** noted that they went shopping – by far the most popular activity, distantly followed by visiting **historic landmarks and places (51%)** and **theme parks (44%)**.





LEGO

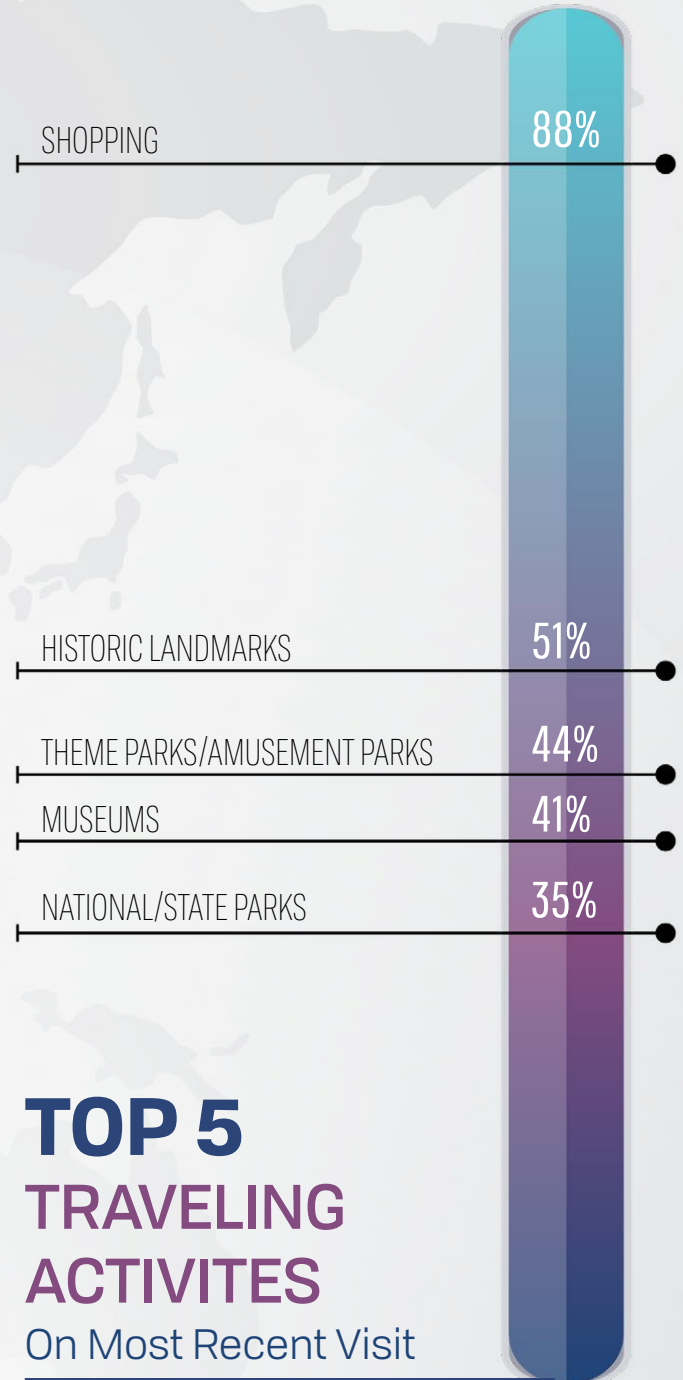
LEGO

LEGO STORE

32 Anaheim, California

One theory could explain this statistically – but not with the statistics from our own study. Any given American city is going to have one – and at most two – theme parks, aside from the major amusement markets of Orlando and Los Angeles. Additionally, these markets may have only a dozen significant historical sites, with more instances in the oldest part of America – the east coast. However, all of these cities will have thousands of opportunities to shop – from corner drug stores, shopping at strip malls or major department stores, to attraction gift shops. It may simply be a numbers game – there are far more points of purchase throughout a city than theme parks and historic sites, so it may be virtually impossible not to shop when traveling.

OR, is there something more
to shopping in America...



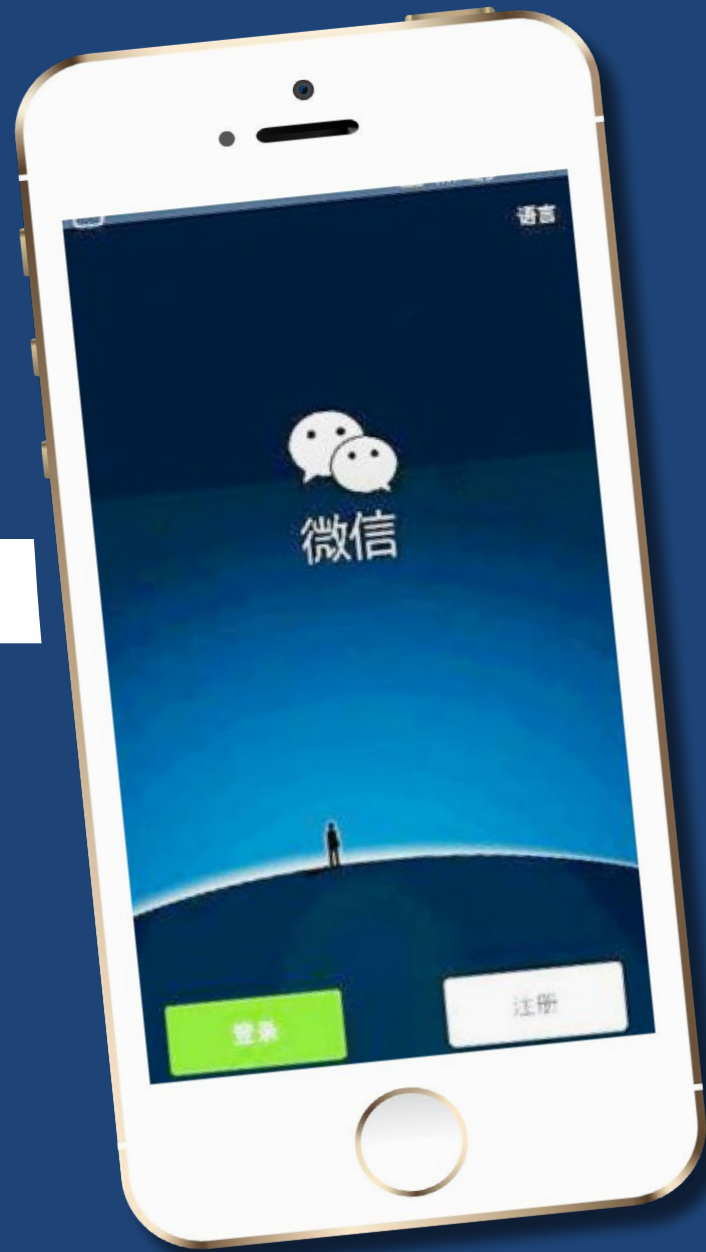
YES,

WE ACCEPT WECHAT PAY

是的 我们接受微信支付

Some called it the **Retailpocalypse of 2017**. Others called it the **Mallpocalypse**. Whatever you want to label it, traditional retail is a dying business in America.

If that's true, then why do our **international guests** love shopping here so much?



FOUR US TRAVELERS — equal the spending of — ONE FOREIGN VISITOR



Shopping malls and centers are not new to our international counterparts. **Alberta's West Edmonton Mall** topples the **Mall of America** as North America's largest mall, while you can walk for miles through Hong Kong's labyrinth of stores strung throughout its financial district skyscrapers or get lost in the neon lights of Shanghai's Nanjing Road. Our major brands aren't landlocked, as they can be found in retailers across the globe. There is certainly some uniqueness to American shopping, however, as global contributors to a lively Quora thread and Business Insider note that the sheer volume and variety of things in supermarkets is astounding, while the idea of easily returning items and 24-hour convenience stores provide novel experiences. Despite the cultural confusions of American tipping, and our country being a land of credit cards while Europeans prefer cash and Asians prefer mobile apps, shopping is a popular activity.

And you definitely want **international guests shopping in your city.**

According to NYC & Company, it takes four US visitors to equal the spending of just one foreign traveler. Foreign visitors accounted for just 20% of the more than 58 million people who visited the city in 2015, but they contributed nearly half of the total \$42 billion these visitors spent. Who is the major driver of this shopping?

CHINA.



“Chinese tourists are the most powerful single source of change in the tourism industry.

For Chinese travelers, shopping is the area of paramount expenditure, with approximately 30% of the total trip expenditure devoted to shopping.”

Taleb Rifai

Secretary General of the World Tourism Organization

The U.S. Travel Association notes that Chinese visitors spend about **\$6,000 each on every visit to America**, as opposed to the average **\$4,000 from visitors from other countries** – and their top activity is shopping.

“Chinese tourism is a big deal for Los Angeles,”

says **Kathy Smits**, the Vice President of International Tourism for the city’s tourism marketing agency. *“China is driving more than one billion dollars into the city’s economy annually.”* Smits notes that this is largely in part to LAX introducing direct flights from more and smaller Chinese cities, the introduction of 10-year VISAs (which makes repeat visitation far easier), and the ever-discussed growing Chinese middle class. *“Luxury brand purchases are surging in part because American stores carry a broader range of products than their counterparts in China,”* said **Julia Zhu**, Consulting Director for Frost & Sullivan. Because of China’s taxes, luxury products are about a third cheaper in the United States.



Westfield World Trade Center Mall

38 New York City, New York

So what are tourism practitioners like you doing to welcome China's big shoppers?

Los Angeles's Tourism Office has opened a handful of offices across China, which actively market on Chinese social media platforms and search engines such as **Weibo, WeChat, and Baidu**. The city also implemented its China-Ready program, which helps educate operators, provides language and cultural assistance, and gives marketing advice. *Universal Studios* now offers a park tour in Mandarin, while the *Getty* provides Chinese audio guides, maps, and markets on Weibo and WeChat as well. *Caesar's Palace* in Las Vegas set up WeChat pay, a popular Chinese mobile payment system similar to Apple Pay. *Tiffany & Co.*, which made almost a quarter of its United States revenue last year from foreign tourists, has added Mandarin-speaking sales staff to its major stores, as has *Burberry*, where more than half of sales at its flagship stores are to tourists. *Montblanc* sells Year of the Dragon pens and has staff members who speak Mandarin and Cantonese, while also printing Chinese-language brochures about its products and selling wallets sized for Chinese currency.

Malls aren't giving up either – they're merely adapting to a desire for a full-day experience of place-making. The *Minneapolis Business Journal* found that the **Mall of America** is Minnesota's most valuable real estate asset, and there are plans to grow The Mall's footprint by nearly another million square feet. This mall, and others,

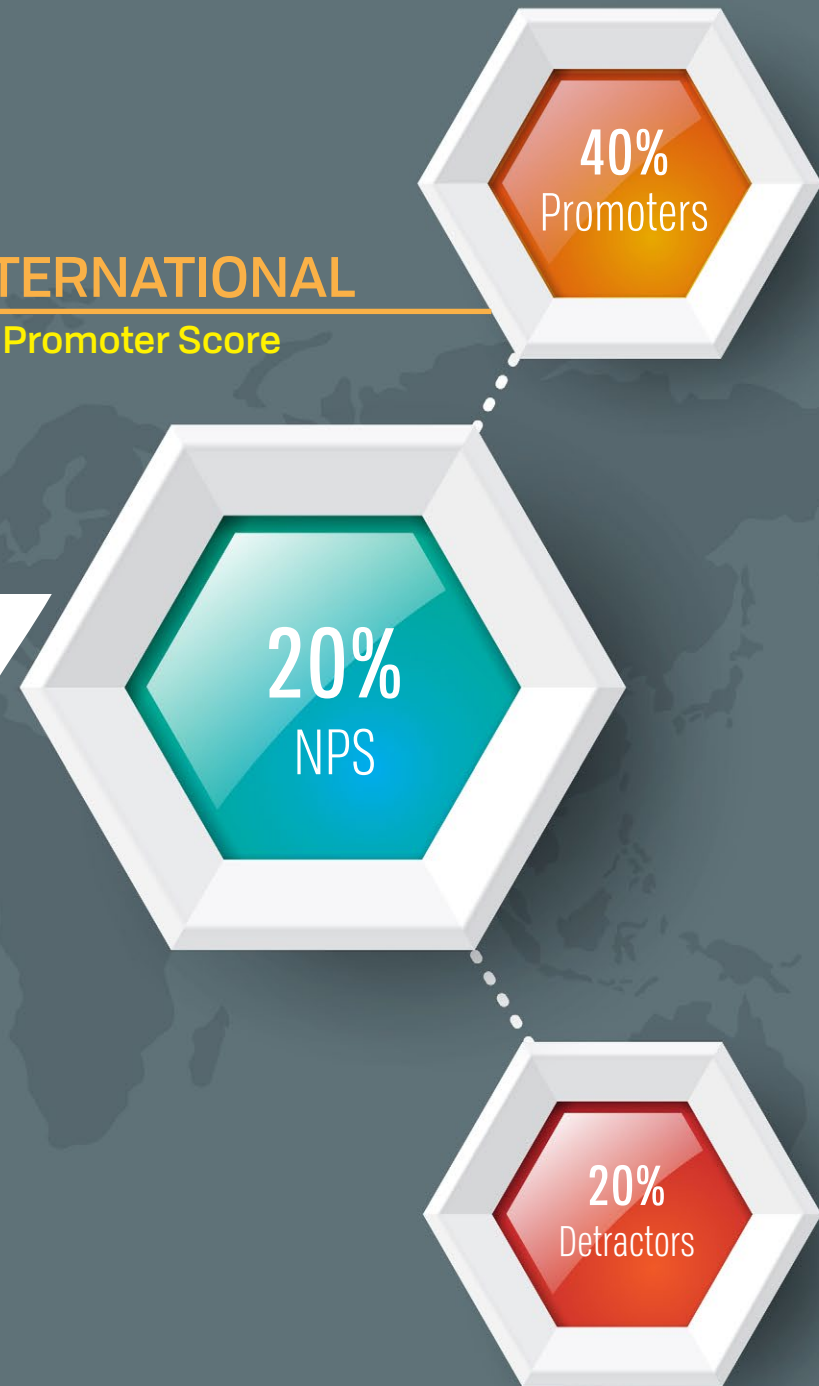
thrive by providing a solid entertainment mix – including bowling alleys, comedy clubs, laser tag, ropes courses, and more. Additionally, malls are upgrading to more luxury dining options and brands – those that can't be easily, and authentically, purchased from large online retailers. From the 375-store Galleria in Houston to the Shops at Crystals in Las Vegas to the Bal Harbour Shops near Miami, shopping centers with brands such as *Gucci and Louis Vuitton* are reporting healthy revenues. Retailers are also upgrading their technology, offering same-day delivery through *Uber* and *Deliv*, or implementing virtual smart mirrors in their dressing rooms that can summon sales clerks, try on clothes virtually, while some at *Sephora* mimic light at different times of the day to see how the makeup will look.

Adapting retail experiences to suit international travelers' shopping preferences, interests, and comforts simply makes smart business sense. For more tips on welcoming guests from abroad, read the *Business Development Bank of Canada's "Six Easy Strategies to Attract More Foreign Visitors to Your Tourism Business."*

BARRIERS TO ENTRY

First impressions can be difficult to perform well, and America as a destination isn't immune to that challenge. **40% of first-time visitors to America** would recommend the attraction(s) they visited to family and friends, while **20% are not likely to recommend** – yielding a **Net Promoter Score (NPS) of 20%**. For those international travelers who've visited the States before though, **the NPS rises strongly to 31%**. For comparison, American residents give American attractions an **NPS of 48%**.

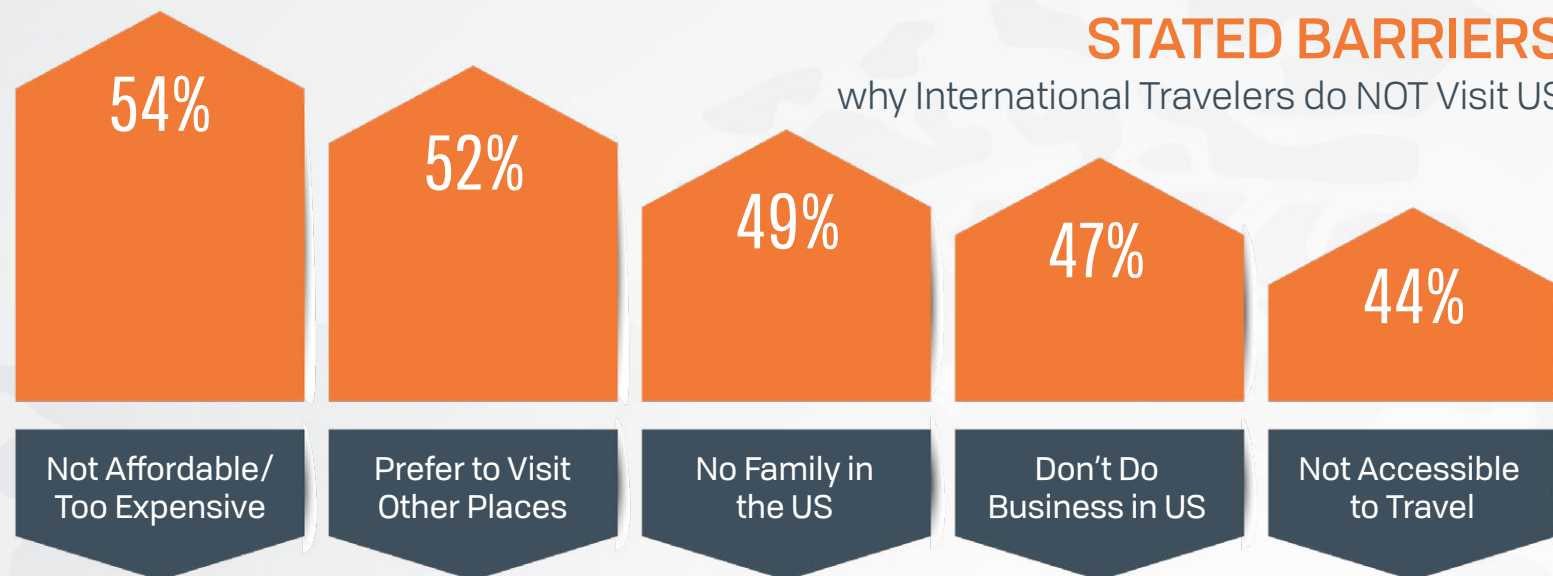
INTERNATIONAL Net Promoter Score



TOP 5

STATED BARRIERS

why International Travelers do NOT Visit US



Regardless of their hesitancy to become advocates for American tourism, **seven in ten international visitors** intend to return to the same American attraction during another future vacation. Chinese tourists exhibit a particularly high intent to come back at a strong **92%**, most likely influenced by the strengths exhibited in the previous article like 10-year VISAs and culturally-comfortable tourism amenities. The Japanese however have the lowest intent to return at **58%**, potentially due to the aforementioned cost or length of travel, and therefore wanting to see something new the next time they visit.

For those international travelers who noted that they were unlikely to visit America in the next five years, open-ended responses revealed that the top reason they wanted to visit other destinations (20%) – it is a big, beautiful world with lots to see and do, after all! Additionally, respondents noted that they had yet to save up the money needed for such a trip (18%), they simply weren't interested in visiting America (11%), and that the current political climate of the United States made them uncomfortable (9%).

Giving these travelers a bank of options, **affordability came in as the primary barrier**, a confirmation of the desire to visit elsewhere in the world, the lack of family or business in the States, or that it's simply not easily accessible. Correlation analysis additionally supported a desire for global variety; or simply put...

"BEEN THERE, DONE THAT."

However, we know that one of America's greatest tourism strengths is its variety. The natural beauty of the Cascade Mountain Range is entirely different from the steep slopes of the Rockies; the city lights of New York twinkle so differently than those of San Francisco; and the food, cultures, accents, and music varies widely from the bayous of Louisiana to the rolling green hills of Wisconsin. Cross-attraction, organization, and regional collaboration, encourage international guests to return and explore different unique parts of the country. **It's not a finite piece of the pie – there's enough authentic America to go around.**

Salve!

Yasou!

Bonjour!

NI HAO, HOLA, KON'NICHIIWA, AND HELLO!

To clearly identify how best we can serve our international guests, we asked them their most important attributes when considering traveling to America, followed by how satisfied they were with those attributes during their most recent visit. The resulting matrix paints a clear picture of where we're excelling and where we can do better.

America has always been a land of opportunity, from the freedom to start anew on the Niña, to write a Revolutionary path forward as a new country, or to

craft one's own American Dream as new, glittering skyscrapers rose into the sky – beam by beam. The opportunity today to attract international travelers from around the world is rich and ripe with innovation, collaboration, and celebrating what makes us authentically American – and it begins with an outstretched hand and a

“WELCOME!”





COUNTRY

PROFILES





CANADA

“Huge shopping malls and especially a rodeo. Also see the Statue of Liberty, New York, Chicago, Miami, and mingle with the American people.”

Canada, most interested

35%

Intent to visit U.S. Activities and Attractions in the next five years

5.7

Average number of nights spent in America during most recent visit

MOST LIKELY TO MOTIVATE A TRIP

Disney World, Las Vegas, and the Grand Canyon

MOST RECOGNIZED ICONS

Disney World, Las Vegas, and Niagara Falls

64%

Intent to visit the same American attraction(s) in the next five years

56%

Had visited their most recent destination before



TOP THREE AGREEMENTS

Big destinations spread out, lots of variety, and great shopping

1.8

Number of different destinations visited

38%

Visited multiple destinations during their last visit

265.4

Miles willing to travel to experience multiple destinations

TOP FIVE INTENDED ACTIVITIES

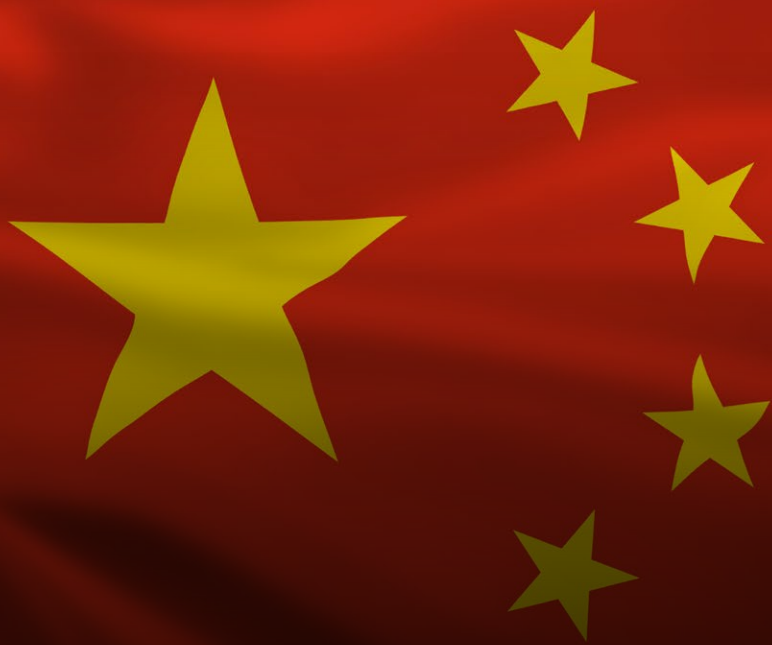
Shopping **66%**, Historic Landmarks/ Places **54%**, Theme Parks **51%**, National/State Parks **51%**, Museums **45%**

TOP THREE DISAGREEMENTS

Safe/worry free, welcoming of everyone, authentic small town charm

89%

HAVE VISITED AMERICA BEFORE



CHINA

*“Time for living, food, modes of transportation, culture and folkways,
local architectural features and environmental characteristics.”*

China, authentically American

66%

Intent to visit U.S. Activities and Attractions in the next five years

5.7

Average number of nights spent in America during most recent visit

MOST LIKELY TO MOTIVATE A TRIP

Disneyland, Hollywood, and the Statue of Liberty

MOST RECOGNIZED ICONS

Disneyland, Statue of Liberty, and Hollywood

92%

Intent to visit the same American attraction(s) in the next five years

22%

Had visited their most recent destination before



TOP THREE AGREEMENTS

many things are influenced by pop culture, big destinations are spread out, and lots of variety

2.4

Number of different destinations visited

68%

Visited multiple destinations during their last visit

197.2

Miles willing to travel to experience multiple destinations

TOP FIVE INTENDED ACTIVITIES

Historic Landmarks/Places **83%**,
Sightseeing Tours **81%**,
Shopping **79%**, Theme Parks **79%**,
National/State Parks **77%**

TOP THREE DISAGREEMENTS

Safe and worry free, affordable, and everyone seems to be in a big hurry

50%

HAVE VISITED AMERICA BEFORE



JAPAN

“Expansive rural areas, brutal cities, healthy pop culture, bad tasting food, no feeling of distance with people.”

Japan, authentically American

41%

Intent to visit U.S. Activities and Attractions in the next five years

4.6

Average number of nights spent in America during most recent visit

MOST LIKELY TO MOTIVATE A TRIP

Disney World, Niagara Falls, and the Grand Canyon

MOST RECOGNIZED ICONS

Statue of Liberty, Niagara Falls, and the Grand Canyon

58%

Intent to visit the same American attraction(s) in the next five years

46%

Had visited their most recent destination before



TOP THREE AGREEMENTS

many things are influenced by pop culture, big destinations are spread out, and lots of variety

2.0

Number of different destinations visited

53%

Visited multiple destinations during their last visit

206.7

Miles willing to travel to experience multiple destinations

TOP FIVE INTENDED ACTIVITIES

Shopping **71%**, Historic Landmarks/ Places **65%**, Theme Parks **61%**, National/State Parks **57%**, Museums **55%**

TOP THREE DISAGREEMENTS

Safe and worry free, affordable, and everyone seems to be in a big hurry

63%

HAVE VISITED AMERICA BEFORE

MEXICO



“A personal experience where you can fully enjoy big cities and the great outdoors at the same time.”

Mexico, authentically American

63%

Intent to visit U.S. Activities and Attractions in the next five years

6.6

Average number of nights spent in America during most recent visit

MOST LIKELY TO MOTIVATE A TRIP

Disney World, Disneyland, and the Grand Canyon

MOST RECOGNIZED ICONS

Disney World, Disneyland, and the Statue of Liberty

78%

Intent to visit the same American attraction(s) in the next five years

55%

Had visited their most recent destination before



TOP THREE AGREEMENTS

A great place for shopping, an easy country to get around with good infrastructure, and lots of variety

2.6

Number of different destinations visited

67%

Visited multiple destinations during their last visit

278.1

Miles willing to travel to experience multiple destinations

TOP FIVE INTENDED ACTIVITIES

Theme Parks **83%**, Shopping **81%**, Historic Landmarks/Places **80%**, National/State Parks **76%**, Museums **76%**

TOP THREE DISAGREEMENTS

Welcoming of everyone, friendly people, and authentic small town charm

52%

HAVE VISITED AMERICA BEFORE



UNITED KINGDOM

“I love the USA and visited many times, there is so much to do and see. It’s an amazing place, so different from east to west. I would go tomorrow if I could.”

UK, most interested

38%

Intent to visit U.S. Activities and Attractions in the next five years

9.9

Average number of nights spent in America during most recent visit

MOST LIKELY TO MOTIVATE A TRIP

The Grand Canyon, Niagara Falls, Route 66, and Disney World

MOST RECOGNIZED ICONS

The Grand Canyon, Niagara Falls, and the Statue of Liberty

61%

Intent to visit the same American attraction(s) in the next five years

47%

Had visited their most recent destination before



TOP THREE AGREEMENTS

A great place for shopping, big destinations are spread out, and lots of variety

2.6

Number of different destinations visited

64%

Visited multiple destinations during their last visit

304.5

Miles willing to travel to experience multiple destinations

TOP FIVE INTENDED ACTIVITIES

Historic Landmarks/Places **66%**, Shopping **57%**, National/State Parks **57%**, Sightseeing Tours **57%**, Theme Parks **50%**

TOP THREE DISAGREEMENTS

Safe and worry free, affordable, and authentic small town charm

59%

HAVE VISITED AMERICA BEFORE

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