Travel and Tourism in the US to 2018

Description: The US is the largest global market in terms of inbound tourist expenditure, which increased from US$119.3 billion in 2009 to US$170.9 billion in 2013, at a CAGR of 9.39%. Growth has been due to various international campaigns such as the Brand USA campaign and the promotional initiatives undertaken by the US in other countries such as Germany and Canada.

- Domestic tourism significantly dominates the overall tourism market in the US, representing 96.7% of the total trips in 2013. The number of domestic trips totaled 2.1 billion in 2013 and is projected to reach 2.2 billion in 2018. The growth of domestic tourism was supported by various state-level campaigns launched in 2013 and 2014 such as 'Pure Michigan' and 'Utah Mighty 5'. Domestic tourist expenditure is projected to grow at a CAGR of 5.45% over the forecast period, to reach US$945.4 billion in 2018.

- The US recorded growth in international arrivals from emerging countries, particularly BRIC countries (Brazil, Russia, India, and China), during the historic period. Visitors from China increased from 880,400 in 2009 to 2.2 million in 2013. Similarly, visitors from Brazil increased from 892,600 in 2009 to 2.1 million in 2013, while visitors from India increased from 550,000 in 2009 to 860,000 in 2013 and visitors from Russia increased from 143,000 in 2009 to 322,000 in 2013. This increase was due to liberal visa procedures by the US and increasing disposable income in these countries.

- From 2000 to 2014, air fares in the US declined by 8%, while taxes included in air ticket prices have increased by 49%. Similarly, tax rates have also been increased by other countries. For instance, the UK government increased its air passenger duty tax for long-haul premium travel from GBP92 per person in 2012 to a maximum of GBP188 per person in 2013. In addition, Spain increased its airport tax, on average, by 19%. These higher taxes are likely to be passed on to customers, which could negatively impact US airlines operating in those European markets.

- Limited-service brands, which are usually present in midscale and upscale hotel categories, are in high demand in the US. As of December 2013, they accounted for 25% of the 340,933 rooms in pipeline. Higher profit margins (up to 50%), lower construction and operational costs compared to full-service hotel, and good and stable performance during the historic period are the key factors attracting investors towards limited-service hotels.

- The concept of car sharing has picked up pace in the US. Between January 2012 and January 2013, the car-sharing fleet's size increased at a rate of 23.6% while membership increased by 24.1% in the US. The growing popularity of car sharing programs is also reflected in the key car rental companies' strategy to acquire the leading car sharing operators. In March 2013, Avis Budget Group acquired Zipcar, a leading car-sharing operator, in a deal worth US$500 million.

- The availability of required information in one place, when conducting research and planning a trip, has propelled the success of travel meta-search engines. Websites such as SkyScanner, Kayak, and other tourism-related price comparison sites are leading a transformation from conventional methods to more innovative, convenient, and economical methods. These search engines are encouraging tourists to plan their trips on their own instead of relying on travel intermediaries.

Synopsis

The report provides detailed market analysis, information and insights, including:
- Historic and forecast tourist volumes covering the entire US Travel and Tourism sector
- Detailed analysis of tourist spending patterns in the US for various categories in the Travel and Tourism sector, such as accommodation, sightseeing and entertainment, foodservice, transportation, retail, travel intermediaries, and others
- Detailed market classification across each category, with analysis using similar metrics
- Detailed analysis of the airline, hotel, car rental, and travel intermediaries industries

Reasons To Buy

- Take strategic business decisions using historic and forecast market data related to the US travel and
tourism sector
- Understand the demand-side dynamics within the US travel and tourism sector, along with key market trends and growth opportunities

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