



# 2015

## Travel Research

### PRODUCTS CATALOG

**U.S. TRAVEL**  
ASSOCIATION

Dear Colleague,

Whether communicating to the public, making the case for your budget, or creating a strategic plan, knowledge is power.

The U.S. Travel Association is the leading source of knowledge on travel research. Enclosed find a listing of products that highlight marketing research, economic impact data and insightful analysis to help you better understand the travel marketplace and make well-informed decisions.

Please consider taking advantage of this widely respected research from U.S. Travel.

Sincerely,



**David Huether**

Senior Vice President, Research  
U.S. Travel Association

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Note: While some items are complimentary, some are at lower cost to U.S. Travel members, and others are exclusive to members. Consider cost savings of membership; visit [ustravel.org](http://ustravel.org) for more information or to join.

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# Interactive Travel Analytics

Subscribe to one, multiple or all four subscriptions.

## Travel Economic Impact Subscription

CC BC AB

**MEMBER:** \$1,995 Annually • **NON-MEMBER:** \$4,500 Annually

This interactive web-based product brings data to life. Enabling travel professional to access, analyze and compare state and congressional district-level economic data (and county/city-level data for clients who purchase *Travel Economic Impact Custom Reports*) like never before. Statistics covered include: employment, payroll, expenditures and taxes generated by the travel industry. The online tool allows users to easily compare employment in the travel industry to other industries within states and compare the performance and size of the travel industry across states over a period of time. The following general economic statistics at the national and state level are also included: GDP, population, median household income, unemployment rate.

**Want to take a test drive?** View our many video tutorials to learn more about the data and functionality - <http://travelanalytics.ustravel.org/Travel/Help>.

### ADDITIONAL SUBSCRIPTIONS:

**MEMBER:** \$495 per subscription

**NON-MEMBER:** \$1,295 per subscription

- Monthly Travel Statistics Subscription:** CC BC AB  
 Monthly trade balance, export and import for U.S. total goods & services and U.S. total travel (passenger fares and other receipts), employment and inflation statistics.
- International Travel Statistics Subscription:** I P CC BC AB  
 International arrivals to the U.S and U.S. resident travelers abroad, average international traveler spending (per international arrival to U.S. and per U.S. resident traveling abroad), travel trade statistics (exports, imports trade balance, growth rates, share of total U.S. exports). In addition, statistics previously in U.S. Travel's International Visitor Information System (IVIS) are being incorporated into this subscription in 2015. International visitation forecast, global long-haul travel statistics and forecasts, international travel market share statistics and forecasts by country to help identify potential markets, and general country-level economic statistics (GDP, inflation, consumer demand, exchange rates).
- Survey of U.S. State Tourism Office Budgets Subscription:** B P CC BC AB  
 Provides data on tourism office budget total (from FY 1972-73), public/private funding (from FY 2000-01), and domestic/international advertising/promotion budget (from FY 1999-00). Also provided complimentary to State Tourism Offices.

*\*Travel economic impact statistics for all 50 states and DC visualized through a map of the U.S. is available to the general public.*

Interactive Travel Analytics is a web-based tool used to easily visualize and analyze domestic and international U.S. travel statistics.

| Travel Data      | DOMESTIC |       |        |               | INTERNATIONAL |        |         |
|------------------|----------|-------|--------|---------------|---------------|--------|---------|
|                  | National | State | County | Congressional | World         | Region | Country |
| Expenditures     | ●        | ●     | ●      | ●             | ●             | ●      | ●       |
| Employment       | ●        | ●     | ●      | ●             |               |        |         |
| Payroll          | ●        | ●     | ●      | ●             |               |        |         |
| Tax Revenue      | ●        | ●     | ●      |               |               |        |         |
| Visitation       |          |       |        |               | ●             | ●      | ●       |
| Trade Statistics |          |       |        |               | ●             | ●      | ●       |

Statistics can be manipulated, displayed and downloaded for your own analysis through a variety of tools.



View maps\*



Create dashboard charts



Download data



Generate comparisons



Manipulate database



Get the latest rankings

## U.S. Travel Barometer

**MEMBER:** Full access • **NON-MEMBER:** Not available

This first of its kind forward-looking report -- based on 30 billion global online lodging searches from 5,000 consumer travel websites (representing nearly 60 percent of all global lodging searches and conversions) is aggregated exclusively for U.S. Travel by nSight. Released regularly to members both on a monthly and ad hoc basis, the U.S. Travel Barometer tracks on a high frequency basis how the travel industry is performing, trending and what the near-term outlook for travel to the U.S. in the next few months looks like. Both domestic and international data are included at a national and regional level to determine trends and changes in travel interest to the U.S. On average, the travel lodging search occurs 90 days in advance of the actual trip.

*Updated Monthly*

## U.S. Travel Outlook

**MEMBER:** Full access  
**NON-MEMBER:** Summary available

U.S. Travel releases a highly informative newsletter focusing on industry trends, the current state of the economy, related forecasts and how this impacts travel. The U.S. Travel dashboard provides a visual display of travel indicators and performance of travel sectors through charts and tables.

*Updated Monthly*



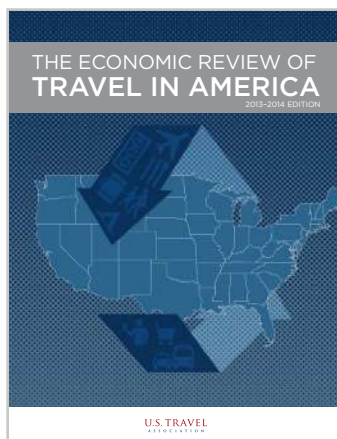
## Economic Review of Travel in America

**B P CC BC**

**MEMBER:** \$300 • **NON-MEMBER:** \$495

This report details the impact of the travel industry on the economy, including total travel expenditures, travel-generated employment, payroll and tax revenue. It also covers global tourism and America's place in it, including inbound travel and the performance of major travel-related industries, including airlines, lodging, amusement and recreation services, and food service.

*2014 edition released Winter 2015*



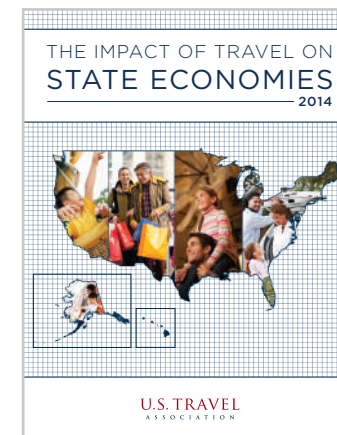
## Impact of Travel on State Economies

**B P CC BC**

**MEMBER:** \$195 • **NON-MEMBER:** \$295

Impact of Travel on State Economies details the importance of the travel industry to the U.S. economy. Economic impact statistics include travelers' expenditures, as well as travel-generated employment, payroll income and tax revenues for the nation, each of the 50 states and Washington, D.C. The report clearly demonstrates that travel—transportation, lodging, food service, entertainment and retail—is one of the America's largest industries and employers.

*Updated 2014 edition released Winter 2015*



*\*State one pagers and congressional level data for every district is available on [ustravel.org/map/economicimpact](http://ustravel.org/map/economicimpact)*

## Travel Economic Impact Custom Reports

**MEMBER:** Call for estimate • **NON-MEMBER:** Call for estimate

The Travel Economic Impact Model (TEIM), developed by U.S. Travel, is the longest-running and most widely used and quoted model to estimate traveler expenditures and related economic impact in the U.S. With these insights travel professionals can determine:

- Travel expenditures for an area of interest;
- Travel's impact on employment, payroll and federal, state and local tax revenue;
- Detailed analysis of 18 travel categories, including lodging, food, retail, public transportation, auto transportation and amusement/recreation; and
- The economic impact of various types of travel, such as business and leisure, transportation mode, type of accommodations used and other trip and traveler characteristics.

## Taking Travel in Hand: How Travelers Use Mobile Before and During a Trip

CC BC

**MEMBER: \$300 • NON-MEMBER: \$495**

At the end of 2014, the number of mobile devices exceeded the number of people on earth. With desktop online bookings on the decline, mobile is projected to continue to grow. Demand for mobile and travel is only growing and must be considered in marketing decisions. This first of its kind study analyzes the everyday use of individuals with travel intent and actual travelers using mobile devices while planning, booking, searching and sharing their travel experience. The study will provide insights into the differences and similarities of various markets including age, gender, trip purpose, travelers with children and first time visitors on the main reasons for using mobile while traveling. Problems experienced, differences in apps and websites and device types are also explored.



*Released Winter 2015*

## NEW! Changing Demographics and Travel

B P CC BC

**MEMBER: \$300 • NON-MEMBER: \$495**

America's domestic travel market is evolving. This report will highlight the country's changing demographic trends and their impact on states and destinations. The report will analyze not only the effects of an aging population, baby boomers and millennials on the travel industry, but also other trends such as couples getting married later and the nation's growing Hispanic population. We will analyze recent demographic trends and changes, the current situation, trends and near term forecast.

*Released Summer 2015*

## NEW! Leisure Travel Decision Making

B P CC BC

**MEMBER: \$300 • NON-MEMBER: \$495**

Voted on at ESTO 2014, this report will interview travelers and seek to answer what are the primary resources and motivators for potential travelers when making decisions of places to go, how much to spend, who to travel with and when. The primary resources travelers rely on and trust for their decision making including social networks will be analyzed and discussed.

*Released Fall 2015*

## NEW! Generational Travel Segments

CC BC

**MEMBER: \$300 • NON-MEMBER: \$495**

The second topic voted on at ESTO 2014, research indicates that the formative experiences of a generational influence lifelong beliefs, values and behaviors, but is this also true for travel? We will discover if Generation M, Millennials, GenY, GenX, Baby Boomers and Matures' decision-making process and travel preferences differ.

*Released Winter 2016*

## International Market Profiles

I P CC BC AB

### **PUBLICLY AVAILABLE:** Market Summary

Detailed reports focusing on top U.S. source markets individually. Identifies potential value of each market, including detailed visitor profiles, historic spending and arrival trends and forecasts. Available market summary from: Australia, Brazil, Canada, Chile, China, India, Israel, Mexico, Poland and South Korea.



## International Answer Sheets

### **PUBLICLY AVAILABLE**

- International Travel to the U.S. Answer Sheet:** International visitation to the U.S., fastest-growing travel markets to the U.S., future high-growth markets to the U.S., Overseas visitation to the U.S. by world region, international traveler spending in the U.S., largest average spending in the U.S. by country.
- World Travel Overview Answer Sheet:** World international visitation and spending, most-visited international destinations, largest international origin markets, largest international travel receipts and expenditures by market.
- Travel's Top 20:** A look back and a look ahead at the world's top arrival and travel export markets to the U.S.

*Released Fall 2014*

## Travel Price Index

CC BC AB

### **MEMBER:** Current and archive editions

### **PUBLICLY AVAILABLE:** Current edition

The Travel Price Index (TPI) measures the seasonally unadjusted inflation rate of the cost of travel away from home in the U.S., based on U.S. Department of Labor price data collected for the monthly Consumer Price Index (CPI). The TPI is released monthly and is directly comparable to the CPI.

*Updated Monthly*

## Travel Forecasts

CC BC AB

### **MEMBER:** Full access

### **NON-MEMBER:** Summary available

Driven by U.S. Travel's proprietary travel forecasting model, these semi-annual domestic and international forecasts allow members to review the industry's performance and consider the prospects for the coming year and beyond.

## Domestic Travel Market Report

CC BC

### **MEMBER:** \$300 • **NON-MEMBER:** \$495

A remarkable 2.1 billion person-trips were taken domestically by U.S. residents in 2014. Gain insights on trip characteristics and traveler demographics for overall U.S. domestic travel and for several key market segments, including geographic origins/destinations, trip duration, business travel, leisure travel, mode of transportation, accommodations, travel party composition, activities, trip planning sources, age, ethnicity, race and income.

*2014 edition released Spring 2015*



# PROJECT:TIME OFF

PUBLICLY AVAILABLE on [projecttimeoff.com](http://projecttimeoff.com)

Project: Time Off is the U.S. Travel Association's initiative to shift American culture so that using personal time off is not considered frivolous, but essential to strengthening families and improving personal health; a business investment with proven returns and an economic necessity. Project: Time Off research defines the problem of unused leave and proves the personal, business and economic benefits that taking earned time off can deliver. Visit [ProjectTimeOff.com](http://ProjectTimeOff.com) for the latest research and supporting materials.

## An Assessment of Paid Time Off in the U.S.

Americans fail to use 429 million days annually or 3.2 days per employee. Foregoing this time results in \$160 billion in total lost economic output; \$67 billion lost in direct travel spending; and 1.2 million lost American jobs. This report defines the problem and opportunity of time off in America.

*Released February 2014*

## Overwhelmed America: Why Don't We Use Our Paid Time Off?

Fear of being replaced and poor communication are among the top reasons people stay at their desks instead of going on vacation. This "work martyr complex" emerges at expense of Americans' health and well being. This report examines the reasons people do not use their earned time off.

*Released August 2014*



## All Work, No Pay: The Impact of Forfeited Time Off

American workers permanently lost a total of 169 million days of PTO across the workforce in 2013; totaling \$52.4 billion in lost benefits. Further, Americans are taking less vacation time than at any point in nearly the last four decades. This report examines what Americans lose when they forgo time off.

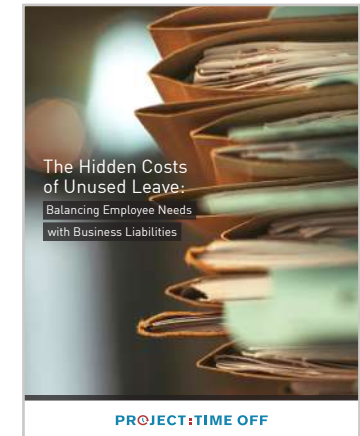
*Released October 2014*

## The Hidden Cost of Unused Time Off

### BALANCING EMPLOYEE NEEDS WITH BUSINESS LIABILITIES

There is \$224 billion sitting on the balance sheets of American businesses resulting from accrued vacation liability, amassed over years of employees rolling over their paid time off. This report uncovers the business impact when employees skip vacation and stay in the office.

*Released March 2015*



### Reports on the benefits of travel include:

#### Destination Healthy Aging: The Physical, Cognitive and Social Benefits of Travel

*Released December 2013*

#### Journey to Healthy Aging: Planning for Travel in Retirement

*Released December 2013*

#### Vacation's Impact on the Workplace

*Released November 2013*

#### The Value of Government Meetings

*Released July 2013*

*For more research on the value of meetings, please visit [meetingsmeanbusiness.com](http://meetingsmeanbusiness.com)*

#### The Role of Business Travel in the U.S. Economy

*Released May 2013*

#### Family Vacations Create Lasting Memories

*Released March 2013*

#### Travel Strengthens Relationships and Ignites Romance

*Released February 2013*

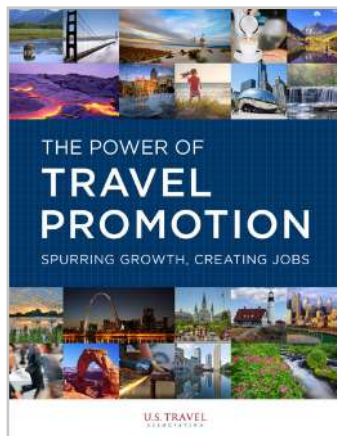


**UPDATED!**  
**The Power of Travel Promotion**

**PUBLICLY AVAILABLE**

This report includes new case studies and data on the positive return on investment that states and destinations have reaped from substantial travel promotion. The report provides valuable information to inform elected officials on the value of travel and tourism and how travel promotion strengthens economic vitality. The Defend Your Budget toolkit also provides powerful ammunition to help make the case for why travel matters.

*First Released August 2013  
 Updated November 2014*

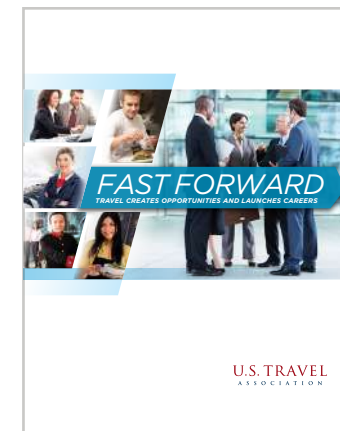


**Fast Forward: Travel Creates Opportunities and Launches Careers**

**PUBLICLY AVAILABLE**

As an indispensable source of American jobs, the travel industry can serve as a ticket to opportunity and as a path to future prosperity - for our economy, communities and individuals nationwide. This report highlights how travel-related jobs give American workers a first foothold on the job ladder and provide valuable skills and education that lead to rewarding careers. Based on longitudinal BLS labor force data and reinforced by successful case studies, travel's unique workforce is compared to other workers who began in other industries.

*Released December 2013*

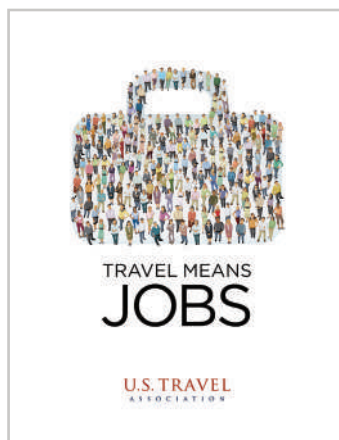


**Travel Means Jobs**

**PUBLICLY AVAILABLE**

Travel plays a critical role in the nation's economy and job creation. The report outlines the industry's economic impact and prevalence, the distinct makeup and nature of travel jobs. Delivering meaningful data and case studies, the report details how travel supports small business and communities, serves as a leading export and creates American jobs that cannot be outsourced. It explains how, with travel-supportive policies in place, the forecast for continued growth and accelerated job creation is strong. Spread the word that Travel Means Jobs in your community with the accompanying toolkit of resources.

*Released August 2013*



**Travel Exports: Driving Economic Growth and Creating American Jobs**

**PUBLICLY AVAILABLE**

When one thinks of an "export," one normally thinks of objects that are boxed and loaded onto container ships in Galveston or Long Beach, like manufacturing or agricultural products. But since it involves the consumption of U.S. goods and services with foreign currency, international travel and tourism falls into the "export" category as well—and it greatly outperforms most other U.S. industries in that capacity, according to this study from the U.S. Travel Association.

*Released September 2014*



## NEW! Global Travel Review

CC BC

MEMBER: \$300 • NON-MEMBER: \$495

International travelers in the U.S. are the source of nearly one of six dollars spent in the travel economy. Overseas visitors, that is, international visitors to the U.S. from outside of North America, make up nearly eight of 10 international purchases of U.S. goods and services. This report will review the recent trends and underlying factors guiding the growth of overseas travel to the United States and investigate the U.S. as a destination market for international travelers. This report will showcase the emerging inbound markets coming into the U.S. and will also look into the trends of the future, from which markets the U.S. should expect the next wave of overseas visitors to come, and with which markets our country should expect to compete in coming years.

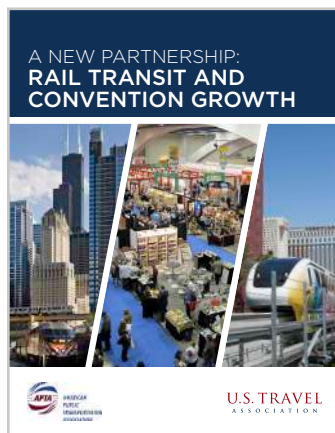
*Released Summer 2015*

## A New Partnership: Rail Transit and Convention Growth

PUBLICLY AVAILABLE

The study found that cities with direct rail access from downtown to airport terminals receive nearly 11 percent more revenue per room than hotels in cities without a rail airport connection. Luxury hotels do even better, generating 12.4 percent more revenue per room.

*Released November 2013*



## Addressing Future Capacity Needs in the U.S. Aviation System

PUBLICLY AVAILABLE

The Eno Center study examines the existing infrastructure at six major U.S. airports and concluded that failure to immediately expand capacity will have dire economic effects on the regions they serve and the U.S. as a whole.

*Released November 2013*



## UPDATED! Thanksgiving in the Skies

PUBLICLY AVAILABLE

This report examines passenger volume and growth data at the country's top 30 airports to calculate how soon the average day of air travel will resemble Thanksgiving-like congestion.

*First Released November 2013*

*Updated November 2014*



## Economic Significance of Meetings

**PUBLICLY AVAILABLE**

Face-to-face meetings play a crucial role for business and our economy. The 2014 interim update, conducted by PricewaterhouseCoopers along with industry partners, is a follow-up study to the original 2009 study estimating the impact, significance and activity of the meetings industry in the United States. In 2012, 1.8 million meetings were held involving 245 million participants. Research shows that the average U.S. business forfeits 17 percent of its profits in the first year of eliminating business travel and that it takes more than three years for profits to recover.

*Released January 2014*

*For more information on Meetings Mean Business, visit [meetingsmeanbusiness.com](http://meetingsmeanbusiness.com)*

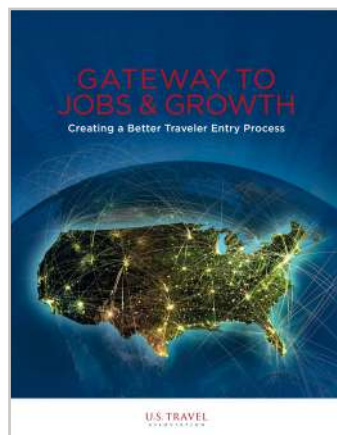
## U.S. Entry: Gateway to Jobs & Growth – Creating a Better Traveler Entry Process

**PUBLICLY AVAILABLE**

This report examines the U.S. Customs Border Protection (CBP) entry process and its impact on the nation's economy. Twenty policy proposals to improve the traveler's entry experience are outlined/all aimed at helping America fully reap the benefits of securely and effectively welcoming millions of international travelers at our airports of entry.

*Released September 2013*

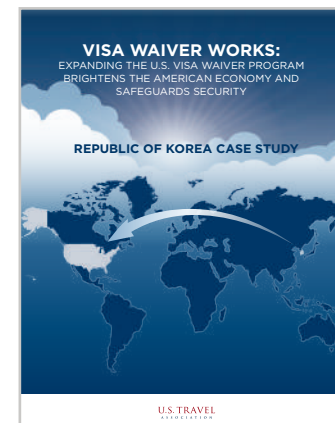
*For more on the customs and entry process and how traveler's can get involved, visit [travelersvoice.org](http://travelersvoice.org).*



## Visa Waiver Works: Expanding the U.S. Visa Waiver Program Brightens the American Economy and Safeguards Security

**PUBLICLY AVAILABLE**

The U.S. travel community evaluates every travel-related policy through the lens of safety and security first and foremost. After all, without security, there is no travel. We strongly believe, as do an overwhelming majority of national security experts, that the Visa Waiver Program (VWP) is a pivotal contributor to national security – protecting the American homeland and public through individualized pre-screening of travelers, greater information sharing, enhanced international partnerships with law enforcement and intelligence services, and more secure passports for participating countries. The study outlines the importance of the program and includes a case study highlighting spending in the U.S. by visitors from South Korea increased 52 percent since that country was admitted to VWP in 2008.



*Released March 2014*

# U.S. TRAVEL SUBSCRIPTIONS

## BASIC

- MEMBER: \$825 • NON-MEMBER: \$1,320**
- Economic Review of Travel in America (page 7)
  - Impact of Travel on State Economies (page 7)
  - Survey of U.S. State Tourism Office Budgets Subscription (page 5)
  - Leisure Travel Decision Making (page 9)

## INTERNATIONAL

- MEMBER: \$900 • NON-MEMBER: \$1,350**
- International Market Profiles (page 10)
  - International Travel Statistics Subscription (page 5)

## PREMIER



- MEMBER: \$1,575 • NON-MEMBER: \$2,520**
- The Premier Subscription Package includes both the basic and international research subscription packages

# INTERACTIVE TRAVEL ANALYTICS SUBSCRIPTIONS

## TRAVEL ECONOMIC IMPACT

- MEMBER: \$1,995 • NON-MEMBER: \$4,500**  
 See page 4 for details

## MONTHLY TRAVEL STATISTICS

- MEMBER: \$495 • NON-MEMBER: \$1,295**  
 See page 5 for details

## INTERNATIONAL TRAVEL STATISTICS

- MEMBER: \$495 • NON-MEMBER: \$1,295**  
 See page 5 for details

## STATE TOURISM OFFICE BUDGETS

- MEMBER: \$495 • NON-MEMBER: \$1,295**  
 See page 5 for details

Exclusive access to selected research and substantial savings on other research are just two of the many benefits for U.S. Travel members. To learn more, contact **Valerie Hutchinson** at [research@ustravel.org](mailto:research@ustravel.org) or **202.218.3630**.

➔ Visit [ustravel.org](http://ustravel.org) to learn more about member benefits.

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# U.S. TRAVEL ASSOCIATION

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