



Important Change in 2014 U.S. International Arrivals Reporting

While the U.S. benefited from a healthy increase in arrivals in 2014, the true growth trend can easily be misunderstood because of a change in methodology. In January 2014, the National Travel and Tourism Office (NTTO) implemented a significant adjustment to international arrivals reporting using I-94 program data. The transition of I-94 data collection from paper to electronic format has generated a more accurate count of one-night stays, which had previously been underrepresented due to complexities associated with the paper format. The adjusted visitor count now aligns more closely with the United Nations World Tourism Organization (UNWTO) standards, which includes one-night stays. More detail about the program can be found on the U.S. Department of Commerce website.

Due to the adjustment in methodology, year-over-year arrivals growth will be inflated in 2014. NTTO has released what comparison data it has available from January to April 2014 - to view click here. As Brand USA prepares annual analysis of its overall impact on inbound U.S. tourism, it will include an estimate of the volume of the additional one-night stays, which is a necessary step for accurate growth trending. The study is currently planned for release in April 2015. As the NTTO data shows in Figure 1, the variance is significant for overseas origin markets at 5.1 percent.

Figure 1 - Old and New Methodology Comparison
Non-Resident U.S. Arrivals (January-April 2014)

	Old Total Arrivals	New Total Arrivals	% Change Old vs. New
Total Overseas	9,399,652	9,874,547	5.1%
Mexico	5,099,208	5,099,208	0.0%
Canada	7,292,145	7,292,319	0.0%
Grand Total	21,791,005	22,266,074	2.2%

Source: NTTO

It is essential for U.S. destinations that reference NTTO data to include an adjustment for the change in methodology in order to understand year-over-year performance. The change in methodology alone more than doubled the overseas arrivals growth rate during the January-April 2014 period (see Figure 2). The impact of the new methodology varies significantly across origin markets, as is detailed in the NTTO data release referenced above. Accurate analysis, therefore, requires individual market consideration.

Figure 2 - Old and New Methodology Comparison
Year-Over-Year Growth in Non-Resident U.S. Arrivals (January-April 2014)

	Old Arrivals Growth	New Arrivals Growth	Variance
Total Overseas	4.3%	9.6%	5.3%
Mexico	21.9%	21.9%	0%
Canada	-1.4%	-1.4%	0%
Grand Total	5.8%	8.1%	2.3%

Source: NTTO