

2014

OVERSEAS
VISITORS TO
TEXAS



==== *It's like a* ====
WHOLE OTHER COUNTRY
=====

July 2015

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Introduction

This report on overseas visitors to Texas is based on data compiled from the 2014 U.S. Department of Commerce, 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 2,169 survey respondents reported a Texas visit in 2014, up from 2147 in 2013, 2,065 in 2012, and 1,826 respondents in 2011. This is an adequate sample size for overseas visitors, providing an opportunity to evaluate the characteristics of the overseas visitor market. However, sampling levels are statistically low for some of the visitor markets to Texas.

There are two data collection methods. The legacy method involves the direct participation of the airlines, which arrange for their flight crews to distribute and collect surveys on-board. The reduction of air carrier participation has created some gaps in the data sets, thus it should be used with caution. To improve the program the NTTO also now collects the questionnaires in the airport departure gate area ("airport-intercept"). The airport-intercept method accounted for approximately 86 percent of all collections in 2014, while the in-flight method accounted for approximately 14 percent.

Due to the logistical challenges in administering the survey, certain airlines and airports are not able to produce completed surveys in proportion to their 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, Denver, Dallas/Ft Worth, Honolulu, Houston, Las Vegas, Los Angeles, Minneapolis, Orlando, Philadelphia, San Juan, and Washington Dulles. 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 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.



Methodology Considerations

In 2014 the U.S. Department of Homeland Security and U.S. National Travel and Tourism Office established a new methodology for counting visitor arrivals to the USA – which technically creates a break in series from previous years. The methodology change should be considered when making 2014 and 2013 year over year comparisons for arrivals and total direct spending.

In 2012 the DOC, NTTO implemented a new questionnaire. For some portions of the questionnaire there was a break in series between 2012 and 2011 and 2012 and 2013. Questions regarding arrivals had no changes. Key question changes that should be noted include:

- Spending per person per trip
- Spending per person per night
- Trip Planning Information (information sources)
- Airline Reservations
- Airline Advance Payments
- Package Tour
- Travel Insurance
- Main Purpose of Trip and Purpose of Trip (multiple response)
- Total Nights Away From Home
- Transportation
- Leisure Activities:
 - Added: Experience Fine Dining, Historical Locations, National Parks/Monuments, Sightseeing, Small Towns/Countryside, Water Sports, Other Specify.
 - Pulled: Dining in Restaurants, Visit Historical Places, Visit National Parks, Sightseeing in Cities, Visiting Small Towns, Touring Countryside, Water Sports/Sunbathing, Ranch Vacations, N/A.
- Spending Outside of Respondents Country
- Itemized Trip Expenses in U.S.
- Expense Payments Methods/Usage
- Expense Share
- Seat in Aircraft
- Airline Ticket Type
- Occupation
- Annual Household Income

Definitions:

- Overseas arrivals include all arrivals from all countries except Mexico and Canada.
- For 2012 clarification of city names was added, especially when the definition was a Metropolitan Division (MD), and not a Metropolitan Statistical Area (MSA). For 2011 and prior the report referenced the U.S. Census Bureau definitions for MSAs and MDs used in the destination(s) tables.

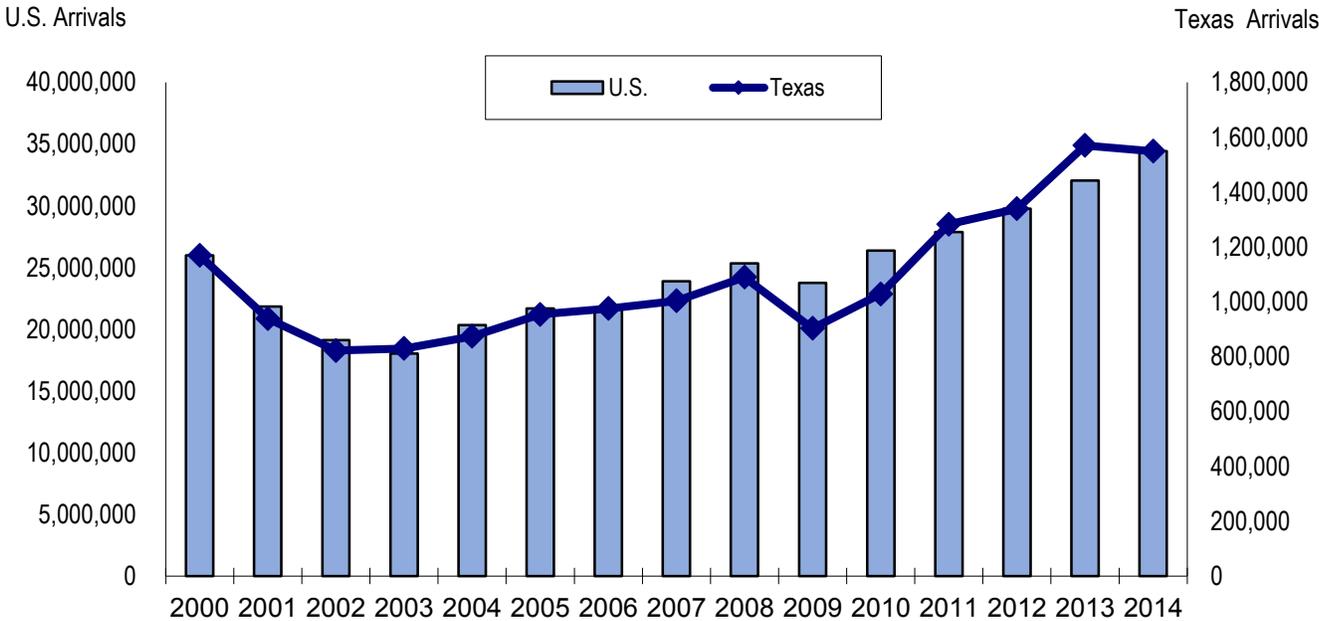


Executive Summary
Overseas Visitors to Texas
2014

2014 Visitor Arrivals to Texas

	2013		2014		Percent Change
	Market Share	Arrivals in (000)	Market Share	Arrivals in (000)	
Total Overseas	4.9	1,570	4.5	1,549	-1%

Overseas Visitors to the U.S. and Texas





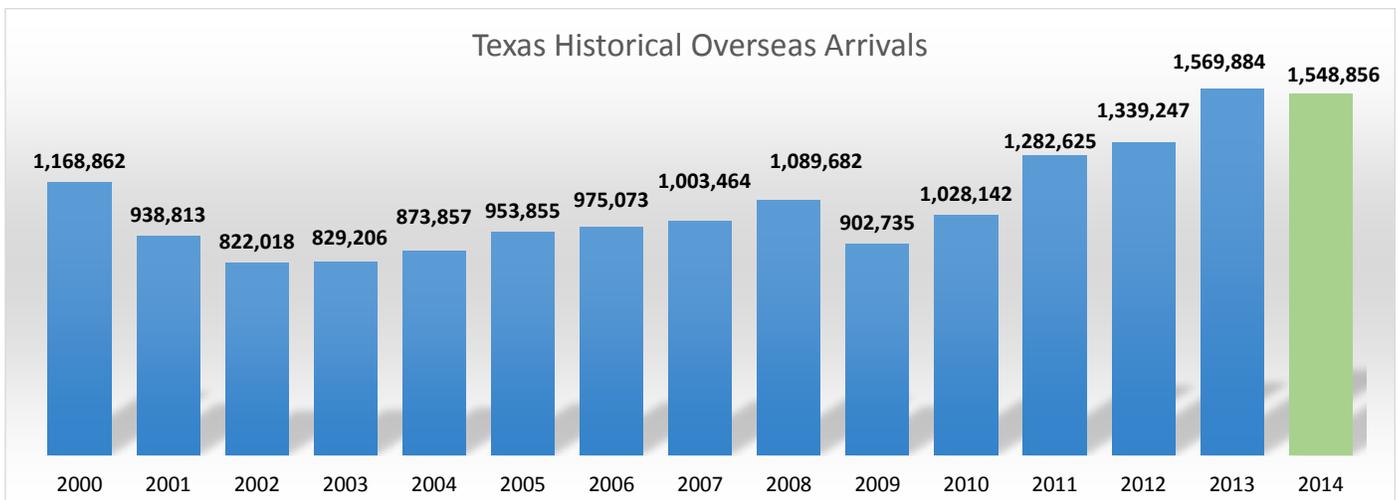
Total U.S. Overseas Visitor Arrivals in 2014:

- In 2014 a record 34.4 million overseas visitors traveled to the United States.
- Overseas arrivals to the U.S. grew 7.4% over 2013 arrivals. Arrivals to the U.S. increased from all world regions. However, the strongest gains were from emerging markets.

Note: In 2014 the U.S. Department of Homeland Security and U.S. National Travel and Tourism Office established a new methodology for counting visitor arrivals to the USA – which technically creates a break in series from previous years. The methodology change should be considered when making 2014 and 2013 year over year comparisons for arrivals and total direct spending.

Texas Overseas Visitor Arrivals in 2014:

- Texas was visited by 1.55 million overseas visitors (excluding Canada and Mexico) during their visit to the U.S. in 2014.
- Arrivals in 2014 were well above the historical average, despite a slight downturn (-1%) from the record arrivals in 2013 and four years of growth.
- In 2014 arrivals increased to Texas for all world regions except Western Europe, South America, and Central America.
- The state increased the share of overseas vacation travelers in 2014, up 5.6% over last year. This is a key indicator that the state’s efforts to attract vacation visitors was effective in 2014.





- The downturn in market share is attributed to shifts in travel demand from Western Europe, South America, and Central America.
- The contraction from these regions was attributed to shifts in travel such as business, convention, and especially visiting friends and family, and a downward shift in passenger arrivals to the state (primarily in Dallas) as a port of entry.
- One key factor in the state’s downturn was an adjustment from the large increase in UK visits in 2013 to visit friends and family (VFR) within Texas. In 2014 UK visits declined 24%, after a record increase in UK visits in 2013. The shift is in large part attributed to a shift in VFR travel from the UK combined with natural national demand shifts. Demand increased for destinations in the Southeastern U.S. and the West coast. In contrast, destinations such as Texas and the Northeast (in general) registered a decline in market share from the UK.

The number of UK resident passengers using Texas as a port of entry in 2014 decreased for Dallas (down -5%), and only increased 1% for Houston.

Other national trends from the UK that impacted visits to the state in 2014 included: a decline in business travel to the U.S., and an increase in UK travelers going to only one state – which reduced the geo-equity and likelihood of extended travel for business or other reasons into Texas.

Texas Arrivals by World Region in 2014

	TOTAL VISITORS TO THE U.S. (IN 000s) 2014	USA PERCENT CHANGE 2014/2013	TEXAS VISITOR EST. VOLUME (IN 000s) 2014	TEXAS SHARE OF COUNTRY MARKET 2014	TEXAS PERCENT CHANGE 2014/2013	TEXAS MARKET SHARE CHANGE 2014
ALL OVERSEAS	34,419	15.7%	1,549	4.5%	-1.3%	-0.4%
EUROPE	13,732	10.0%	590	4.3%	-12.1%	-0.9%
WESTERN EUROPE	12,784	8.8%	550	4.3%	-13.8%	-1.0%
ASIA	9,641	16.0%	376	3.9%	25.3%	0.6%
SOUTH AMERICA	5,481	24.1%	197	3.6%	-10.9%	-0.7%
CENTRAL AMERICA*	933	16.2%	93	10.0%	-27.3%	-5.4%
MIDDLE EAST	1,225	32.4%	92	7.5%	4.5%	-0.8%
OCEANIA	1,555	17.6%	92	5.9%	7.0%	-0.1%
AFRICA	513	37.5%	80	15.5%	8.1%	-1.4%
CARIBBEAN	1,339	18.4%	37	2.8%	5.7%	-0.2%
EASTERN EUROPE	947	30.3%	48	5.1%	41.2%	1.2%

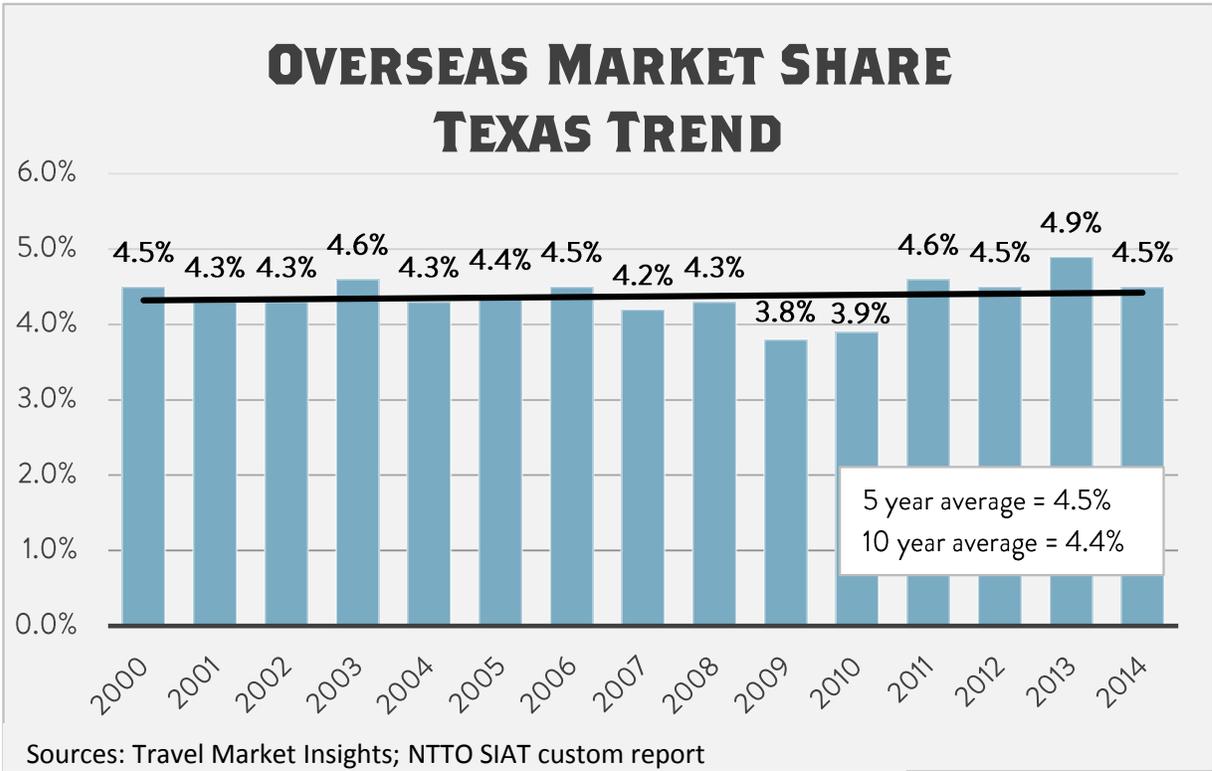
*=Central America Excludes Mexico



Texas Market Share in 2014

Change in Texas Overall Market Share (Time Line):

- Texas attracted 4.5% of all overseas visitors in 2014. Historically, the ten year average market share for Texas is 4.4% of all overseas visitors. The share of visitors for Texas has been above average since 2011.





Texas Arrivals by Top Visitor Market in 2014

	TOTAL VISITORS TO THE U.S. (IN 000s) 2014	USA PERCENT CHANGE 2014/2013	TEXAS VISITOR* EST. VOLUME (IN 000s) 2014	TEXAS SHARE OF COUNTRY MARKET 2014	TEXAS PERCENT CHANGE 2014/2013	TEXAS MARKET SHARE CHANGE 2014
1. United Kingdom	3,973	3.6%	171	4.3%	-24.3%	-1.6%
2. India	962	12.0%	121	12.6%	23.5%	1.2%
3. Germany	1,969	2.7%	110	5.6%	-0.9%	-0.2%
4. China*	2,188	21.1%	101	4.6%	87.0%	1.6%
5. Australia*	1,276	5.9%	79	6.2%	3.9%	-0.1%
6. Brazil*	2,264	9.9%	68	3.0%	-2.9%	-0.4%
7. Japan*	3,579	-4.0%	57	1.6%	-24.0%	-0.4%
8. Venezuela*	616	-21.8%	57	9.2%	-21.9%	0.0%
9. France*	1,625	7.9%	55	3.4%	-3.5%	-0.4%
10. Netherlands*	616	4.6%	52	8.4%	-5.5%	-1.0%

*Texas visitor arrivals sample is below the recommended threshold, use with caution.

Change in Texas Market Share by Country:

- Texas market share for British visitors was 4.3%, slightly above the 10 year average (4.1%) for Texas, but significantly down from the high of 5.9% in 2013.
- Market share for Germany is trending down. In 2014 the share dropped another 0.2 points to 5.6%. However, the 2014 market share is still above the 10 year average (5.1%).
- The Texas market share of Brazilian travelers to the U.S. continued to decline. In 2014 only 3.0% of all Brazilians visited Texas, down from 3.4% in 2013 and 5.5% in 2012. In 2014 market share for Brazil remained below the historical 10 year average (5.0%) and below the 7.8% high water mark in 2006.
- France registered a decrease in market share in 2014. The state attracted 3.4% of all French travelers to the United States. Market share was well below the historical ten year average of 4.6% of the total French visitors to the United States.
- India market share continued to grow, up three years in a row. In 2014 Texas attracted 12.6% of all Indian visitors to the United States. Market share in 2014 was above the five year average (11.1%) but still well shy of the record 14.8% high water mark set in 2008.



- The state's share of Australian visitors was down 0.1 points to 6.2% in 2014. But well above the historical ten year average (4.7%).
- Japanese market share decreased 0.4 points in 2014 to 1.6% of all Japanese visitors to the U.S., on par with the historical ten year average (1.6%).
- The market share for Chinese visitors was up 1.6 points to register 4.6% of the total Chinese visitors to the U.S. in 2014. Market share in 2014 was above the five year average for the state (3.9%) but well below the high (10.5%) set in 2008.
- The Netherlands market share for Texas decreased 1.0 points to 8.4% of all visitors from the Netherlands to the United States. The 2014 share was well above the ten year historical average (7.2%).
- South Korea market share was down 0.1 points to 1.9% of total U.S. visitors from South Korea and 1.0 point below the historical ten year average (2.9%).



Texas Overseas Visitor Total Direct Spending

- In 2014 the 1.55 million visitor arrivals to Texas spent an estimated \$1.9 billion USD in total direct spending while visiting the state.
- Spending decreased 7.0% from the record set in 2013 (see note below).
- On average, in 2014 overseas visitors to Texas spent \$1,222 per visitor while in Texas.

2014 OVERSEAS VISITOR TOTAL DIRECT SPENDING*	
Overseas to Texas	
Total Direct Spending	\$1,892,878,000
Spending/visitor/stay	\$1,222

*Estimated from average daily spending in USA, nights in Texas, and Texas visitor arrivals.

Note: In 2014 the U.S. Department of Homeland Security and U.S. National Travel and Tourism Office established a new methodology for counting visitor arrivals to the USA – which technically creates a break in series from previous years. The methodology change should be considered when making 2014 and 2013 year over year comparisons for arrivals and total direct spending.

Note: Spending methodology in 2013 and 2012 changed from previous years. In 2012 a new survey method was developed by the USDOC, NTTO. In 2013 Texas Tourism adjusted the daily spend to reflect the U.S. average daily spend due to the variance in spending from the 2012 methodology change. Starting in 2013 Texas Tourism total direct spending is derived from:

1. Average daily spending by visitors to the U.S.
2. Average nights spent in Texas.
3. Estimated visitor arrivals to Texas.

Total Direct Spending* Top Overseas Markets	
	2014 Spending
UK	\$159,885,000
India	\$191,119,500
China	\$224,260,400
Japan	\$77,645,400
Brazil	\$122,481,600
Germany	\$93,632,000
Australia	\$94,547,200
S. Korea	\$81,928,000
France	\$45,980,000
Netherlands	NA

*Spending is based on U.S. average daily spending per person, average nights spent in Texas, and estimated visitors to Texas. It is a break in series from previous years.

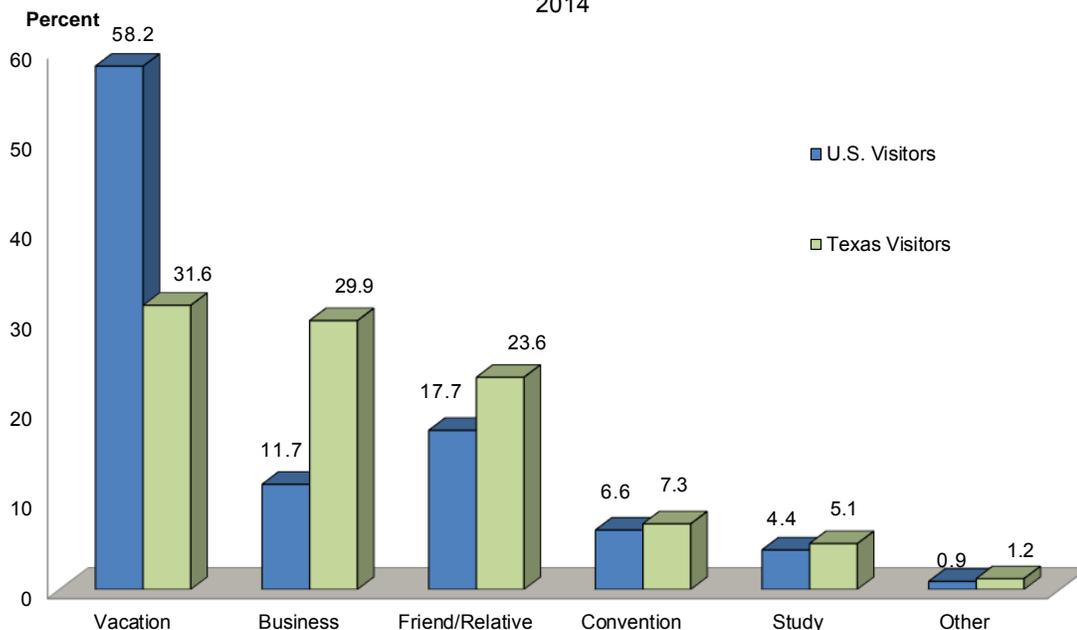


INFLUENCES ON TRAVEL TO TEXAS IN 2013

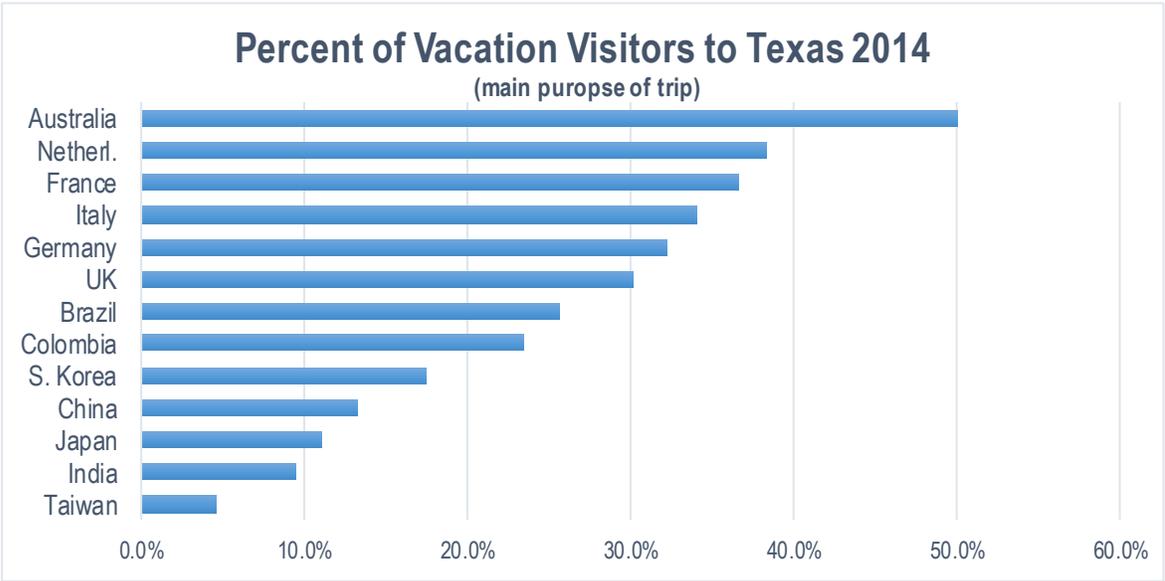
Vacation Purpose of Trip

- Texas is significantly more reliant on business and friends and relatives (VFR) compared to the U.S. overall. The state is also more reliant on convention and student visitors compared to the U.S. overseas visitor in 2014.
- Only 32% of the total overseas visitors to Texas were visiting for a vacation. Compare that to the U.S. average (58%) and the gap for the state is clear. This impacted visits to Texas in 2014 given vacation as a share of the total visits to the U.S. grew faster than the other segments.
- Working to expand vacation travel as part of the visitor mix is important for the state to increase market share, and reduce spikes and declines in visits.
- Australia is the top ranked market by the share of vacation visitors to Texas. However, only half of the Australian visitors to Texas traveled for a vacation as their main reason for visiting. By comparison, 75% of the Australians to the U.S. were on vacation in 2014.

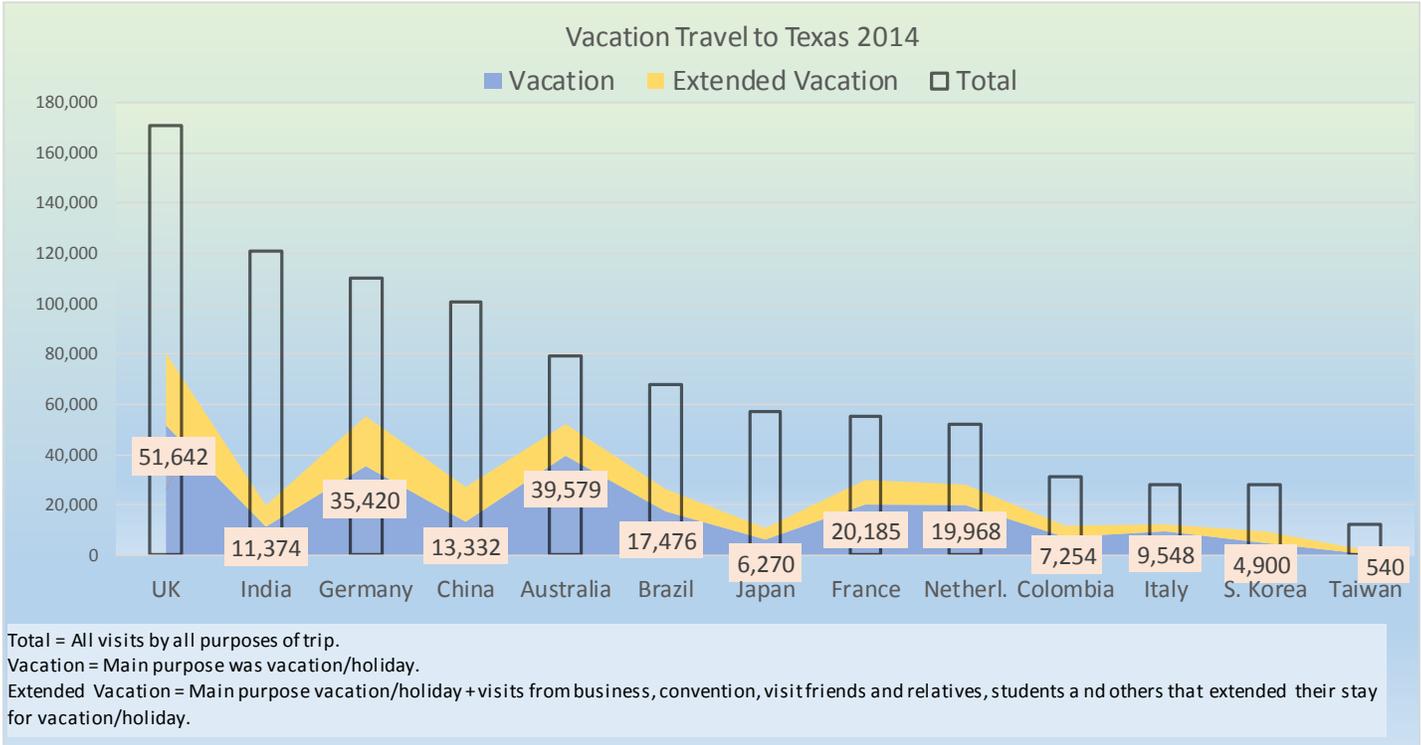
MAIN PURPOSE OF U.S. TRIP
OVERSEAS VISITORS TO TEXAS/U.S.
2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



- The UK was the top total visitor market for Texas, yet only three in ten (30%) UK visitors to Texas were on vacation, as their main reason for coming. India, the second largest total visitor market, had only 9% of the 121,000 visitors traveling to Texas for a vacation.
- The top vacation and extended vacation markets by volume included: the UK, Australia, Germany, France, and the Netherlands.





Texas Airports and Hub Impact

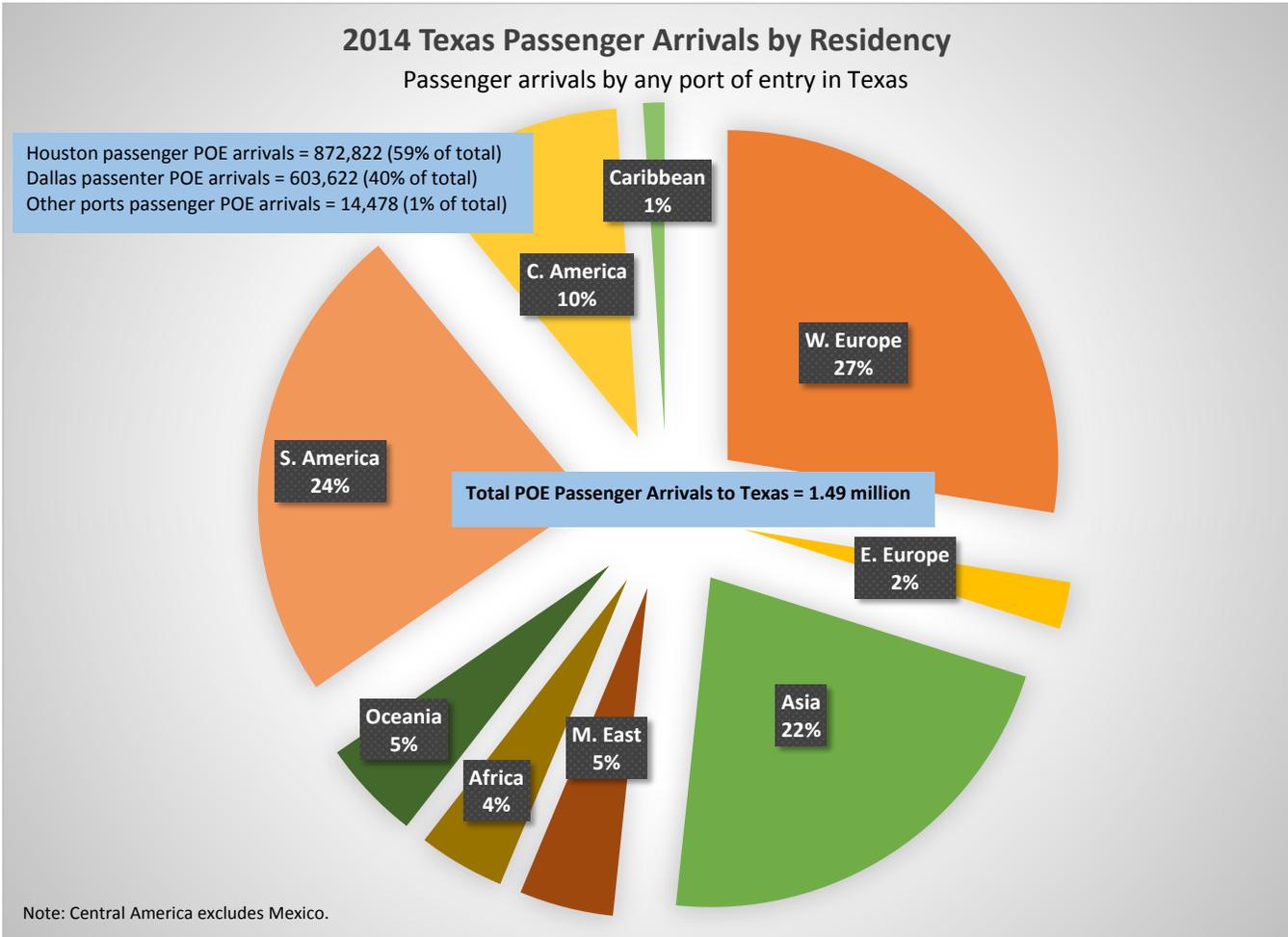
- In 2014 just under 1.5 million overseas resident passengers arrived into Texas ports of entry. Approximately 27% were residents of Western Europe. South America accounted for 24%, Asia 22%, Central America 10%, Oceania and the Middle East (5% each), Africa 4%, and the Caribbean 1 percent.
- Over half (55%) or an estimated 849,000 of the 1,549,000 overseas visitors to Texas entered the U.S. in Houston (606,000) or Dallas (243,000). The other half of the visitors entered the U.S. in other ports of entry and then visited Texas at some point during their trip.
- Houston accounted for 59% of the passengers entering Texas as an official port of entry to the United States. In 2014, 873,000 residents of overseas countries officially entered the U.S. through Houston, up 16.9% over last year. However, only 60% of the visitors entering the U.S. in Houston considered their main destination to be Texas. Some visited Texas before leaving because 69.4% (or 606,000) of the Houston POE passengers visited Texas at some point during their U.S. trip.

The Houston hub impact: This means that out of the 873,000 overseas resident passengers that entered the U.S. in Houston approximately 267,000 did not visit the state in 2014.

- Dallas accounted for 40% of the total overseas residents officially entering the U.S. in Texas. In 2014, 604,000 overseas residents entered the U.S. in Dallas, up 7.3% over last year. However, only 29.7% considered Texas as their main destination. An estimated 40.3% (243,000) of the passengers that entered Dallas visited Texas at some point during their U.S. visit.

The Dallas hub impact: This means that out of the 604,000 overseas residents that entered the U.S. in Dallas, only 243,000 visited Texas, and 361,000 of the passengers never visited the state during their 2014 visit.

- The growth in overseas resident passenger arrivals using Texas airports to enter the U.S. is strong and a clear positive influence in attracting visitors to the state. However, as highlighted above, in 2014 the state could have benefited from an additional 628,000 passengers that entered the U.S. in Houston and Dallas, but did not visit the state.
- If the 628,000 passengers that used Houston and Dallas as a hub stayed in Texas just one night their economic impact would add an additional \$59 million in direct spending to the state.



2014 Overseas Resident Passenger Volume, Visits, and Hub Impact	
Non-US resident overseas passengers using Texas as port of entry	1.5 million
Non-US resident passengers using Houston as a port of entry	873,000
Percent of POE Houston passengers that visited Texas	69.4%
Visitor volume of POE Houston passengers that visited Texas	606,000
Hub passengers (entered Houston did not visit Texas)	267,000
Non-US resident passengers using Dallas as a port of entry	604,000
Percent of POE Dallas passengers that visited Texas	40.3%
Visitor volume of POE Dallas passengers that visited Texas	243,000
Hub passengers (entered Dallas did not visit Texas)	361,000
Total Houston and Dallas hub passengers	628,000



Summary Quick Facts

- **Texas Overseas Arrivals.** Texas was visited by 1.55 million overseas visitors (excluding Canada and Mexico) that indicated they stayed in Texas during their visit to the U.S. in 2014.
- **Overseas Spending in Texas.** In 2014 an estimated 1.55 million overseas visitors to Texas spent over \$1.8 billion USD during their stay in Texas.
- **Top Overseas Markets.** The UK is the top visitor market for total visits, followed by India and China.
- **Vacation Visitors.** Texas share of vacation visitors is trending up, however, there is a lot of room for growth given only 32% of the state's visitors traveled to Texas for a vacation (as their main purpose) - measurably lower than the U.S. share (58%).
- The top vacation markets by visitor volume for Texas include: the UK, Australia, and Germany.
- **Positive Take Away.** Continued growth in passenger arrivals into Texas airports from overseas visitors has positively impacted growth in arrivals and spending for the state. Continued expansion of efforts to attract vacation travelers will have a significant impact on the state's ability to increase market share.
- **Challenges Ahead.** Traditional and emerging markets are important and require stronger partnerships in order to expand efforts and remain competitive. The state will need to continue to promote competitively in traditional visitor markets, and also expand more efforts into emerging markets. Additionally, a comprehensive review of the hub impact is needed to develop a plan to convert passengers using Dallas and Houston as a hub into visitors that stay in Texas at some point during their U.S. trip.



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Texas Overseas Visitors 2014 Report



2014 Selected Highlights for Overseas Travelers to Texas

Data presented as a percentage in table unless indicated otherwise.

	Overseas	Overseas Leisure*	UK	UK Leisure*	Germany	France	Netherlands	Brazil	Japan	China	S. Korea
Estimated Arrivals	1,549,000	984,000	171,000	121,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000
Market Share	4.5%	3.5%	4.3%	3.5%	5.6%	3.4%	8.4%	3.0%	1.6%	4.6%	1.9%
Total Spend	\$1,892,878,000	\$1,014,934,541	\$159,885,000	\$121,363,000	\$93,632,000	\$45,980,000	-	\$122,481,600	\$77,645,400	\$224,260,400	\$81,928,000
Spend/stay	\$1,222	\$1,446	\$935	\$1,003	\$851	\$836	-	\$1,801	\$1,362	\$2,220	\$2,926
Spend/night	\$94	\$113	\$85	\$85	\$76	\$88	NA	\$158	\$139	\$91	\$70
Nights in Texas	13.0	12.8	11.0	11.8	11.2	9.5	9.7	11.4	9.8	24.4	41.8
Nights in hotel	9.1	7.9	7.9	7.4	5.9	7.2	7.9	10.1	5.7	16.6	34.2
Stayed in hotel	63.2	49.4	59.1	44.3	64.5	66.7	70.5	61.4	87.9	64.7	60.9
Share of nights in hotel	70.0	61.7	71.8	62.7	52.7	75.8	81.4	88.6	58.2	68.0	81.8
Purpose of Trip (Multiple Purposes Possible)											
Leisure	45.3	71.3	47.0	66.4	50.3	54.5	54.1	38.8	19.0	26.9	34.1
Business	33.1	7.9	26.5	4.2	30.7	20.5	27.2	39.7	50.4	40.2	36.9
VFR	39.3	61.8	47.3	66.9	43.5	44.0	39.7	27.5	17.4	29.6	39.8
Student/Education	7.5	4.9	2.8	1.8	3.5	4.4	5.9	9.5	6.1	20.6	22.4
Historical Places	30.7	37.6	30.9	39.3	36.1	39.7	44.3	27.5	14.6	13.5	23.8
Sightseeing	66.1	76.6	68.7	79.7	71.5	71.4	71.2	51.3	56.0	59.9	67.1
Small Towns	34.7	42.4	40.3	50.4	44.7	44.9	45.2	20.6	14.2	22.8	25.2
Car Rental	35.8	35.2	34.8	30.8	45.9	47.6	43.8	42.2	25.3	21.5	27.2
Dallas Port of Entry	15.7	16.8	17.4	19.4	22.5	19.7	6.6	20.9	16.1	9.6	21.7
Texas Main Destination	76.9	70.2	80.9	77.6	74.7	73.6	79.8	78.3	83.1	71.6	85.5
States Visited	1.9	2.1	1.7	1.9	2	1.8	2	1.7	1.7	2.0	1.8
Nights in U.S.	24.1	25.5	16	18	19.7	19.5	20.3	17.9	13.8	37.1	48.9
Texas Share of Nights	53.9	59.4	68.8	67.5	56.9	48.7	47.8	63.7	71.0	65.8	85.5

*Note: Overseas leisure and UK leisure is defined as visitors that indicated main or secondary trip purpose was vacation or visit friends and relatives.

Texas Overseas Visitors 2014 Report



2014 Selected Highlights for Overseas Travelers to Texas

Data presented as a percentage in table unless indicated otherwise.

	India	Australia	Italy	Taiwan	Colombia	Nordic	Central America	Middle East	Overseas Biz/CV	POE Dallas	POE Houston
Estimated Arrivals	121,000	79,000	28,000	12,000	31,000	59,000	93,000	92,000	618,000	604,000	873,000
Market Share	12.6%	6.2%	3.0%	2.8%	3.5%	4.4%	10.0%	7.5%	-	1.8%	2.5%
Total Spend	\$191,119,500	\$94,547,200	\$37,590,000	\$15,681,600	\$41,369,500	-	\$81,244,800	\$183,337,600	-	-	-
Spend/stay	\$1,580	\$1,197	\$1,343	\$1,307	\$1,335	-	\$874	\$1,993	-	-	-
Spend/night	\$65	\$136	\$75	\$99	\$85	NA	\$104	\$106	NA	NA	NA
Nights in Texas	24.3	8.8	17.9	13.2	15.7	8.7	8.4	18.8	9.7	19.8	16.8
Nights in hotel	22.9	5.6	5.6	9.8	4.4	6.9	3.9	10.6	8.4	15.7	9.6
Stayed in hotel	59.5	70.8	67.9	66.4	62.7	68.4	41.9	58.6	87.2	74.5	68.9
Share of nights in hotel	94.2	63.6	31.3	74.2	28.0	79.3	46.4	56.4	86.6	79.3	57.1
Purpose of Trip (Multiple Purposes Possible)											
Leisure	16.4	66.1	43.9	17.4	38.0	41.6	55.7	36.1	11.3	55.5	39.1
Business	47.9	12.2	36.2	58.3	39.0	37.4	17.3	39.1	83.0	20.7	33.8
VFR	36.9	42.4	25.5	36.2	38.4	40.5	57.8	40.4	11.7	36.0	36.3
Student/Education	7.0	4.7	10.6	3.6	9.8	9.1	5.5	11.6	4.6	11.4	8.3
Historical Places	25.7	51.3	33.9	14.6	20.0	30.1	11.5	25.1	17.6	29.5	22.1
Sightseeing	68.4	88.6	50.7	63.4	71.6	57.9	58.5	63.7	51.7	72.9	59.1
Small Towns	27.3	53.0	36.5	17.5	43.5	43.2	31.0	34.9	19.5	31.5	24.8
Car Rental	17.1	42.4	39.7	45.7	43.3	54.0	36.4	35.7	39.7	30.4	34.7
Dallas Port of Entry	25.4	33.1	14.8	2.0	6.4	7.6	15.0	9.0	13.7	100.0	0.0
Texas Main Destination	88.9	54.0	79.0	76.3	82.8	83.9	83.1	83.1	84.5	29.7	60.4
States Visited	1.8	2.9	2	1.8	1.6	1.8	1.4	1.8	1.6	1.7	1.3
Nights in U.S.	40.1	23.3	24.2	20.8	23.5	16.1	13.8	31.2	17.4	26.4	18.4
Texas Share of Nights	60.6	37.8	74.0	63.5	66.8						

Overseas Biz/CV is defined as: All residents of overseas countries who visited Texas in 2014 and stated business or convention as a main or secondary purpose of trip.

POE Dallas and POE Houston are defined as: All residents of overseas countries who listed the respective cities as their U.S. port of entry during 2014.



**Table
RESIDENCE OF VISITORS TO THE UNITED STATES AND TEXAS
2014**

Residence of Visitors	UNITED STATES		TEXAS		TX Share of Visitors From This Country
	Num. of Visitors to the U.S.	2014/2013 Percent Change	Number of Visitors to Texas	2014/2013 Percent Change*	
OVERSEAS ⁽²⁾	34,419,016	7.43%	1,548,856	-1.3%	4.5%
WESTERN EUROPE	12,784,471	6.23%	549,732	-13.8%	4.3%
France	1,624,604	7.97%	55,237	-3.4%	3.4%
Germany	1,968,536	2.72%	110,238	-0.8%	5.6%
Italy	934,066	11.35%	28,022	-28.9%	3.0%
Netherlands	615,856	4.51%	51,732	-6.6%	8.4%
Spain	700,084	12.94%	32,904	26.4%	4.7%
Sweden	543,336	14.01%	12,497	-2.9%	2.3%
Switzerland	486,506	2.84%	13,622	-26.2%	2.8%
United Kingdom	3,972,655	3.58%	170,824	-24.5%	4.3%
EASTERN EUROPE	947,477	10.11%	48,321	44.0%	5.1%

Sources: U.S. Department of Commerce, National Travel and Tourism Office; Travel Market Insights

⁽²⁾ Overseas data include arrivals from all countries except Canada and Mexico.

^(*) Large variances may occur due to small sample sizes.

Texas Overseas Visitors 2014 Report



RESIDENCE OF VISITORS TO THE UNITED STATES AND TEXAS 2014

Residence of Visitors	UNITED STATES		TEXAS		TX Share of Visitors From This Country
	Num. of Visitors to the U.S.	2014/2013 Percent Change	Number of Visitors to Texas	2014/2013 Percent Change*	
ASIA	9,641,032	6.12%	376,000	25.4%	3.9%
China, PRC	2,188,387	21.14%	100,666	85.7%	4.6%
India	961,790	11.95%	121,186	23.7%	12.6%
Japan	3,579,363	-4.05%	57,270	-23.2%	1.6%
Korea, Republic of	1,449,538	6.59%	27,541	1.3%	1.9%
Singapore	150,224	-1.70%	17,576	35.3%	11.7%
Taiwan	413,048	7.40%	11,565	-11.6%	2.8%
MIDDLE EAST	1,225,120	15.78%	91,884	4.6%	7.5%
AFRICA	513,445	16.86%	79,584	7.2%	15.5%
South Africa	113,575	8.16%	12,039	101.1%	10.6%
OCEANIA	1,555,382	8.81%	91,768	7.0%	5.9%
Australia	1,276,124	5.90%	79,120	4.2%	6.2%
SOUTH AMERICA	5,480,579	6.58%	197,301	-10.8%	3.6%
Argentina	684,727	-0.20%	15,064	-35.4%	2.2%
Brazil	2,263,865	9.88%	67,916	-3.0%	3.0%
Colombia	881,219	17.79%	30,843	-6.3%	3.5%
Venezuela	615,975	-21.84%	56,670	-21.8%	9.2%
CENTRAL AMERICA	932,866	11.87%	93,287	-27.4%	10.0%
CARIBBEAN	1,338,644	15.84%	37,482	8.1%	2.8%

Sources: U.S. Department of Commerce, National Travel and Tourism Office; Travel Market Insights

(*) Large variances may occur due to small sample sizes .



Historical Summary

Texas Overseas Visitors 2014 Report



RESIDENCE OF VISITORS TO TEXAS MARKET SHARE 2014

Residence of Visitors	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
OVERSEAS	4.5%	4.3%	4.3%	4.6%	4.3%	4.4%	4.5%	4.2%	4.3%	3.8%	3.9%	4.6%	4.5%	4.9%	4.5%
WESTERN EUROPE	4.8%	4.7%	4.8%	4.6%	4.6%	4.1%	3.9%	3.9%	3.7%	3.3%	3.8%	4.2%	4.3%	5.3%	4.3%
France	6.5%	6.4%	3.9%	5.2%	7.0%	7.7%	7.2%	5.3%	2.3%	4.0%	4.4%	4.7%	3.6%	3.8%	3.4%
Germany	6.8%	5.0%	7.2%	6.5%	5.4%	5.4%	4.8%	4.5%	4.3%	3.9%	5.6%	5.5%	5.9%	5.8%	5.6%
Italy	5.3%	4.2%	3.5%	6.6%	2.7%	2.0%	2.4%	4.2%	3.0%	2.0%	2.3%	2.1%	3.2%	4.7%	3.0%
Netherlands	3.1%	3.4%	4.2%	6.0%	6.2%	-	8.7%	7.8%	6.6%	4.5%	5.4%	6.4%	7.9%	9.4%	8.4%
Spain	-	-	-	-	-	-	-	-	1.7%	1.1%	2.6%	3.2%	4.9%	4.2%	4.7%
Sweden	7.3%	2.4%	-	-	2.7%	3.6%	2.2%	0.6%	4.4%	1.9%	1.7%	2.9%	3.1%	2.7%	2.3%
Switzerland	-	-	-	-	-	-	-	-	2.6%	1.8%	1.0%	1.5%	2.7%	3.9%	2.8%
United Kingdom	4.1%	4.9%	4.1%	3.5%	4.1%	3.6%	3.3%	3.8%	4.2%	3.7%	3.7%	4.3%	4.2%	5.9%	4.3%
EASTERN EUROPE	3.3%	1.5%	2.4%	3.6%	4.3%	2.7%	1.1%	9.0%	2.4%	2.5%	4.3%	2.8%	4.1%	3.9%	5.1%
ASIA	3.5%	3.7%	3.7%	3.7%	3.2%	3.1%	4.2%	3.6%	4.3%	3.2%	3.4%	2.8%	3.1%	3.3%	3.9%
China, PRC	-	-	-	-	-	7.8%	7.5%	5.8%	10.5%	5.6%	3.9%	3.9%	4.3%	3.0%	4.6%
India	-	-	-	-	-	-	-	-	14.8%	10.1%	11.9%	9.7%	10.1%	11.4%	12.6%
Japan	1.9%	1.6%	2.5%	2.4%	1.7%	1.7%	2.6%	1.5%	1.5%	1.2%	1.7%	1.4%	1.2%	2.0%	1.6%
Korea, Republic of	-	-	-	-	3.1%	3.4%	4.2%	2.6%	4.2%	3.1%	2.3%	2.4%	2.9%	2.0%	1.9%
Singapore	7.8%	5.9%	8.8%	9.0%	6.2%	5.7%	8.0%	9.7%	9.7%	8.2%	7.6%	6.4%	8.0%	8.5%	11.7%
Taiwan	6.8%	5.6%	6.7%	8.7%	6.2%	5.5%	6.6%	5.2%	6.5%	5.2%	5.1%	4.5%	5.0%	3.4%	2.8%
MIDDLE EAST	10.1%	4.8%	4.3%	3.9%	4.6%	6.2%	5.3%	4.7%	6.0%	5.4%	5.8%	6.3%	4.5%	8.3%	7.5%
AFRICA	2.2%	7.8%	12.1%	10.8%	10.0%	8.0%	11.9%	12.6%	11.5%	9.6%	9.4%	11.4%	14.5%	16.9%	15.5%
South Africa	-	-	-	7.4%	7.4%	7.5%	-	14.2%	9.7%	5.9%	9.9%	5.3%	8.7%	5.7%	10.6%
OCEANIA	5.3%	5.1%	4.1%	5.9%	4.5%	3.7%	3.7%	3.6%	4.0%	6.0%	2.4%	5.3%	6.2%	6.0%	5.9%
Australia	5.7%	5.6%	4.0%	5.9%	4.9%	4.0%	3.7%	3.8%	3.3%	6.4%	2.1%	4.9%	6.6%	6.3%	6.2%
SOUTH AMERICA	4.3%	4.2%	4.9%	5.2%	7.0%	9.9%	8.4%	5.7%	5.3%	4.5%	4.6%	6.6%	5.6%	4.3%	3.6%
Argentina	2.3%	3.8%	4.5%	3.6%	4.3%	-	-	-	3.5%	5.3%	4.2%	4.2%	4.7%	3.4%	2.2%
Brazil	2.6%	6.2%	5.8%	4.9%	7.7%	5.5%	7.8%	5.1%	5.0%	4.3%	3.5%	6.5%	5.5%	3.4%	3.0%
Colombia	-	-	5.8%	7.4%	4.1%	-	-	4.8%	4.5%	3.6%	4.7%	4.9%	5.2%	4.4%	3.5%
Venezuela	-	-	-	-	-	-	-	-	9.5%	5.6%	7.3%	7.8%	7.2%	9.2%	9.2%
CENTRAL AMERICA*	-	8.4%	5.6%	14.8%	7.2%	10.0%	-	8.8%	15.1%	11.1%	9.2%	15.8%	12.2%	15.4%	10.0%
CARIBBEAN	2.0%	0.1%	0.7%	1.8%	1.6%	1.7%	1.1%	2.4%	1.1%	2.9%	1.6%	5.5%	2.0%	3.0%	2.8%

Sources: U.S. Department of Commerce, National Travel and Tourism Office; Travel Market Insights

Note: Overseas Texas arrival estimates are based on "SIAT" Table 24 - Q14a. U.S. Destinations Visited (Multiple Response)

* Central America excludes Mexico

- No data available

Texas Overseas Visitors 2014 Report



RESIDENCE OF VISITORS TO TEXAS ESTIMATED ARRIVALS 2014

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
OVERSEAS	1,168,862	938,813	822,018	829,206	873,857	953,855	975,073	1,003,464	1,089,663	902,735	1,028,142	1,282,625	1,339,247	1,569,884	1,548,856
WESTERN EUROPE	536,408	428,239	395,893	381,528	428,070	405,077	377,343	424,866	451,326	362,296	432,393	503,445	505,302	637,849	549,732
France	70,661	56,055	28,636	35,822	54,269	67,656	56,867	52,868	28,611	48,180	59,057	70,697	52,406	57,177	55,237
Germany	121,451	65,688	85,670	76,714	71,275	76,439	66,505	68,587	76,639	65,786	96,667	100,309	110,681	111,155	110,238
Italy	32,455	19,839	14,216	26,970	12,712	10,911	12,788	26,634	23,384	15,066	19,279	18,723	26,603	39,428	28,022
Netherlands	17,152	13,999	16,143	22,421	26,342	-	38,870	39,534	40,115	24,651	30,790	38,465	46,748	55,394	51,732
Spain	-	-	-	-	-	-	-	-	11,192	6,564	16,631	22,406	29,756	26,034	32,904
Sweden	23,497	5,533	-	-	6,865	10,459	6,292	2,025	17,469	6,164	6,322	12,730	13,702	12,867	12,497
Switzerland	-	-	-	-	-	-	-	-	8,891	6,403	3,905	7,148	12,869	18,449	13,622
United Kingdom	192,823	200,766	156,486	137,764	176,412	156,418	137,815	170,919	191,725	144,269	142,482	164,918	158,062	226,283	170,824
EASTERN EUROPE	13,925	5,770	8,518	12,405	16,343	11,683	5,061	46,170	14,027	14,290	26,076	18,847	29,818	33,558	48,321
ASIA	264,406	233,674	210,505	185,121	185,659	192,141	258,373	229,572	265,662	181,399	238,663	202,910	257,647	299,793	376,000
China, PRC	-	-	-	-	-	21,081	24,034	23,049	51,758	29,390	31,268	42,487	63,400	54,197	100,666
India	-	-	-	-	-	-	-	-	88,648	55,497	77,461	64,356	73,168	97,944	121,186
Japan	96,166	65,323	90,682	76,072	63,710	66,026	95,487	52,972	48,744	35,019	57,563	45,494	44,377	74,606	57,270
Korea, Republic of	-	-	-	-	19,424	23,973	31,824	20,961	31,894	23,059	25,473	27,485	36,292	27,198	27,541
Singapore	10,642	5,842	8,559	7,877	6,605	6,609	9,840	13,115	13,722	8,807	10,588	10,195	12,966	12,990	17,576
Taiwan	31,097	19,996	19,298	20,793	18,456	17,539	19,825	16,173	19,168	12,456	14,846	13,064	14,508	13,076	11,565
MIDDLE EAST	70,913	30,919	20,749	17,437	23,100	32,696	29,295	29,140	40,853	35,961	42,662	51,073	41,643	87,824	91,884
AFRICA	6,499	22,391	29,188	25,517	24,075	20,176	30,055	35,028	36,248	28,201	29,671	37,288	54,149	74,255	79,584
South Africa	0	0	0	5,330	5,804	6,683	0	13,308	9,088	4,657	7,937	4,590	8,272	5,986	12,039
OCEANIA	38,757	29,902	21,693	30,951	29,689	27,263	27,980	30,024	34,065	52,319	26,286	65,902	81,958	85,770	91,768
Australia	30,755	23,852	16,285	23,936	25,478	23,271	22,321	25,442	22,768	46,309	18,989	50,855	74,064	75,919	79,120
SOUTH AMERICA	126,483	106,306	88,946	79,154	115,174	180,211	161,922	129,618	135,437	123,369	149,514	247,941	247,306	221,105	197,301
Argentina	12,281	16,492	7,410	5,426	7,212	-	-	-	11,135	18,891	18,320	21,515	28,882	23,327	15,064
Brazil	19,168	34,187	23,495	17,098	29,625	26,696	40,971	32,611	38,462	38,382	41,925	98,038	98,511	70,050	67,916
Colombia	-	-	18,643	20,739	12,110	-	-	18,708	18,861	15,283	23,253	24,344	31,322	32,917	30,843
Venezuela	-	-	-	-	-	-	-	-	48,180	28,402	35,887	43,764	48,582	72,502	56,670
CENTRAL AMERICA*	-	64,747	39,427	97,064	49,794	69,621	-	69,168	117,104	84,127	69,961	118,053	97,961	128,416	93,287
CARIBBEAN	26,626	1,202	7,368	17,969	17,519	19,293	13,178	31,608	13,092	34,976	19,212	60,028	22,630	34,669	37,482

Sources: U.S. Department of Commerce, National Travel and Tourism Office; Travel Market Insights

Note: Overseas Texas arrival estimates are based on "SIAT" Table 24 - Q14a. U.S. Destinations Visited (Multiple Response)

* Central America excludes Mexico

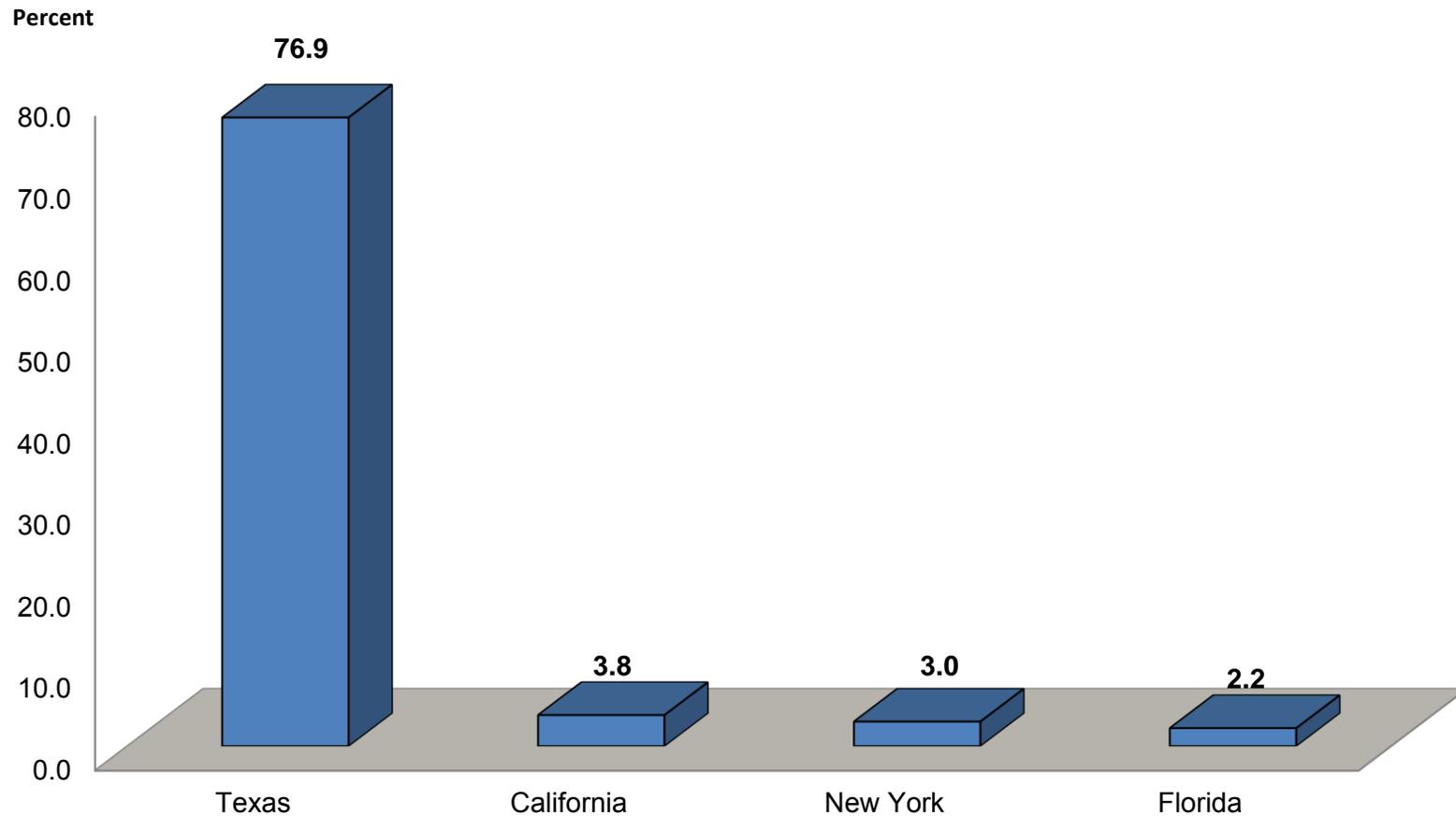
- No data available



Overseas Visitors to Texas
2014



MAIN STATE DESTINATION OVERSEAS VISITORS TO TEXAS 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



MAIN DESTINATION BY STATE OVERSEAS VISITORS TO TEXAS 2014

- Over three quarters (77%) of the overseas visitors to Texas indicated that Texas was their main destination on their U.S. trip (down from 82% in 2013 and 81% in 2012).
- Of all the overseas visitors to Texas, visitors from India (89%) reported the highest proportion with Texas as their main destination in the United States. For the most part, nearly all of the key markets and world regions have a high proportion of visitors that indicated Texas was their main destination.
- In contrast, travelers from Australia (54%) were least likely to indicate Texas as their main destination, up from 52% in 2013. China (72%), France (74%), and Germany (75%) had a lower percent indicating their main destination was Texas – but only lower relative to the other top markets and not low compared to most U.S. destinations.

Texas Overseas Visitors 2014 Report



Table: Main Destination

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What was the main destination that you visited since you left home? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,675	461	298	156	181	212	205	73*	50*	333	127
U.S. DESTINATIONS	93.4%	92.8%	94.1%	91.8%	97.1%	95.3%	94.2%	91.7%	94.3%	97.7%	81.8%
NEW ENGLAND	-	0.2%	0.3%	-	-	0.4%	0.1%	-	-	-	1.5%
MIDDLE ATLANTIC	3.7%	2.7%	1.3%	3.5%	7.3%	1.7%	2.0%	8.7%	0.9%	2.2%	7.3%
New York	3.0%	2.0%	1.3%	3.5%	7.3%	1.4%	1.1%	5.2%	0.9%	1.4%	7.3%
Pennsylvania	0.5%	0.7%	-	-	-	0.4%	0.8%	3.5%	-	-	-
EAST NORTH CENTRAL	1.2%	0.5%	2.0%	0.3%	2.1%	1.2%	0.7%	-	1.3%	1.5%	3.1%
Illinois	0.7%	0.5%	2.0%	0.3%	2.1%	0.6%	-	-	1.3%	1.1%	0.6%
WEST NORTH CENTRAL	0.3%	-	2.3%	-	-	0.5%	-	-	-	0.3%	1.3%
SOUTH ATLANTIC	3.6%	3.3%	3.5%	4.8%	3.9%	7.6%	1.1%	0.8%	1.3%	1.0%	5.8%
Dist. of Columbia	0.2%	0.8%	-	-	-	-	0.4%	-	-	-	-
Florida	2.2%	1.2%	1.6%	2.1%	3.9%	7.0%	0.5%	0.8%	-	0.3%	1.9%
EAST SOUTH CENTRAL	0.3%	0.2%	-	-	-	0.4%	-	-	2.6%	0.2%	0.1%
WEST SOUTH CENTRAL	78.2%	82.6%	76.1%	78.6%	81.8%	78.3%	83.6%	73.6%	87.3%	89.8%	54.6%
Louisiana	0.8%	1.6%	0.6%	4.4%	1.7%	-	0.5%	0.9%	-	-	0.6%
Oklahoma	0.3%	0.1%	0.5%	0.6%	0.3%	-	-	-	1.7%	-	-
Texas	76.9%	80.9%	74.7%	73.6%	79.8%	78.3%	83.1%	71.6%	85.5%	88.9%	54.0%
MOUNTAIN	1.9%	1.1%	4.2%	1.4%	0.1%	2.9%	1.7%	0.9%	-	-	2.6%
PACIFIC	4.1%	2.1%	4.4%	2.9%	1.5%	2.2%	3.6%	7.7%	0.8%	2.6%	5.1%
California	3.8%	2.1%	2.6%	2.9%	1.0%	2.2%	3.6%	7.7%	0.8%	2.6%	4.0%
PACIFIC ISLANDS	0.2%	-	-	0.3%	0.5%	-	1.4%	-	-	-	0.5%
INT'L DESTINATIONS	6.6%	7.2%	5.9%	8.2%	2.9%	4.7%	5.8%	8.3%	5.7%	2.3%	18.2%
Europe	0.2%	-	-	-	0.5%	0.2%	-	-	-	0.2%	1.0%
South America	1.4%	1.9%	0.5%	0.3%	-	1.0%	2.3%	5.2%	-	0.3%	4.4%
Central America	2.0%	3.8%	4.6%	7.8%	2.4%	1.5%	3.3%	-	5.7%	0.7%	5.1%

* Denotes small sample.

Texas Overseas Visitors 2014 Report



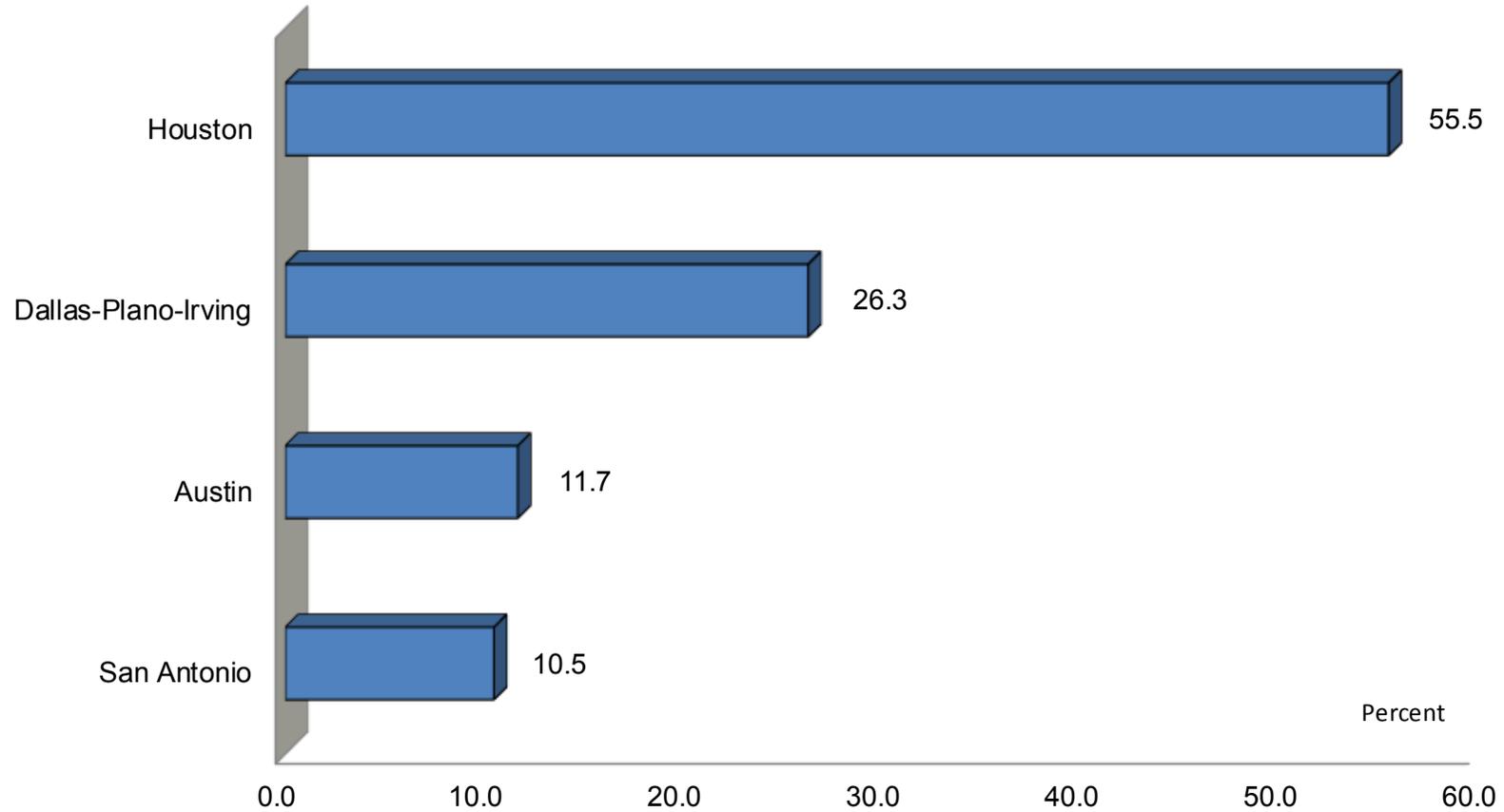
Table: Main Destination (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What was the main destination that you visited since you left home? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	93*	79*	96*	223	268	208	889	814	560	1061	301
U.S. DESTINATIONS	97.4%	98.6%	97.1%	98.5%	91.8%	96.6%	91.8%	95.7%	91.0%	93.7%	91.4%
NEW ENGLAND	-	1.9%	-	-	-	0.9%	-	-	1.4%	-	0.2%
MIDDLE ATLANTIC	4.9%	3.1%	-	1.3%	0.3%	2.3%	4.6%	3.0%	5.1%	3.3%	4.0%
New York	2.9%	3.1%	-	1.2%	0.3%	2.3%	3.8%	2.5%	4.5%	2.1%	2.9%
Pennsylvania	-	-	-	0.1%	-	-	0.5%	0.4%	0.4%	0.6%	1.0%
EAST NORTH CENTRAL	2.3%	-	0.5%	1.7%	0.5%	0.7%	1.8%	0.3%	5.4%	1.9%	0.3%
Illinois	2.3%	-	0.5%	1.7%	0.2%	-	1.1%	0.2%	2.0%	0.9%	0.3%
WEST NORTH CENTRAL	1.1%	2.4%	-	1.1%	0.3%	0.8%	0.1%	0.3%	4.1%	2.3%	-
SOUTH ATLANTIC	1.9%	2.9%	1.0%	3.5%	1.2%	3.7%	5.1%	2.4%	18.0%	5.4%	4.4%
Dist. of Columbia	-	1.4%	1.0%	-	0.9%	0.5%	0.3%	0.2%	2.4%	0.3%	0.8%
Florida	1.0%	-	-	3.3%	0.1%	2.4%	3.3%	1.0%	11.2%	3.3%	1.7%
EAST SOUTH CENTRAL	-	-	-	0.5%	-	-	0.4%	0.2%	2.0%	0.9%	-
WEST SOUTH CENTRAL	81.0%	76.3%	87.3%	84.6%	85.1%	84.4%	71.7%	85.1%	37.0%	63.9%	79.1%
Louisiana	2.0%	-	1.4%	0.8%	2.0%	-	1.0%	0.3%	1.9%	1.3%	1.6%
Oklahoma	-	-	3.1%	-	0.1%	1.4%	0.4%	-	2.6%	2.0%	-
Texas	79.0%	76.3%	82.8%	83.9%	83.1%	83.1%	70.2%	84.5%	29.7%	60.4%	77.6%
MOUNTAIN	1.1%	0.9%	3.8%	2.2%	2.3%	1.2%	2.8%	1.0%	6.8%	6.5%	1.7%
PACIFIC	5.0%	11.1%	4.4%	3.0%	1.9%	2.6%	5.0%	3.4%	9.0%	9.3%	1.7%
California	5.0%	11.1%	4.4%	3.0%	1.6%	2.3%	4.7%	3.1%	8.1%	7.8%	1.7%
PACIFIC ISLANDS	-	-	-	0.6%	-	-	0.3%	-	2.3%	0.1%	-
INT'L DESTINATIONS	2.6%	1.4%	2.9%	1.5%	8.2%	3.4%	8.2%	4.3%	9.0%	6.3%	8.6%
Europe	2.6%	-	-	-	3.4%	0.8%	0.4%	0.1%	0.2%	0.3%	-
South America	-	1.4%	-	0.9%	-	-	2.3%	-	2.1%	0.4%	2.8%
Central America	-	-	-	0.6%	0.2%	1.7%	1.9%	1.9%	2.8%	2.8%	4.3%

* Denotes small sample.



TOP MSA DESTINATIONS* OVERSEAS VISITORS TO TEXAS 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014

* = multiple response



TEXAS MSAs VISITED OVERSEAS VISITORS TO TEXAS 2014

- The top Texas destinations (MSAs) visited for overseas travelers in 2014 included Houston (56%), up from 51% on 2013, 48% in 2012, and 47% in 2011), Dallas (26%, down from 28% in 2013, 31% in 2012, and 33% in 2011), Austin (12%, up from 11% in 2013, down from 13% in 2012, and up from 10% in 2011), and San Antonio (11%, up from 9% in 2013 and on par at 11% in 2012). Fort Worth was not reported due to the small sample size.
- Houston was the top MSA for overseas visitors and all of the key countries except Australia and Taiwan, for which Dallas garnered a larger share of visitors.
- The strongest market penetration for Austin was from South Korea, Taiwan, and Nordic countries.
- The strongest market penetration for San Antonio was from France, Colombia, and the Middle East
- It is important to note that visitors to Texas often visit other destinations during their U.S. visit. The international visitor tends to travel to multiple states, although the share that visit one destination is increasing. In 2014 the overseas visitor to Texas visited an average of 1.9 states and 2.4 cities on average. The other states visited varies by country and often is tied to air routes and ports of entry.

Texas Overseas Visitors 2014 Report



Table: Texas Destinations (MSAs) Visited

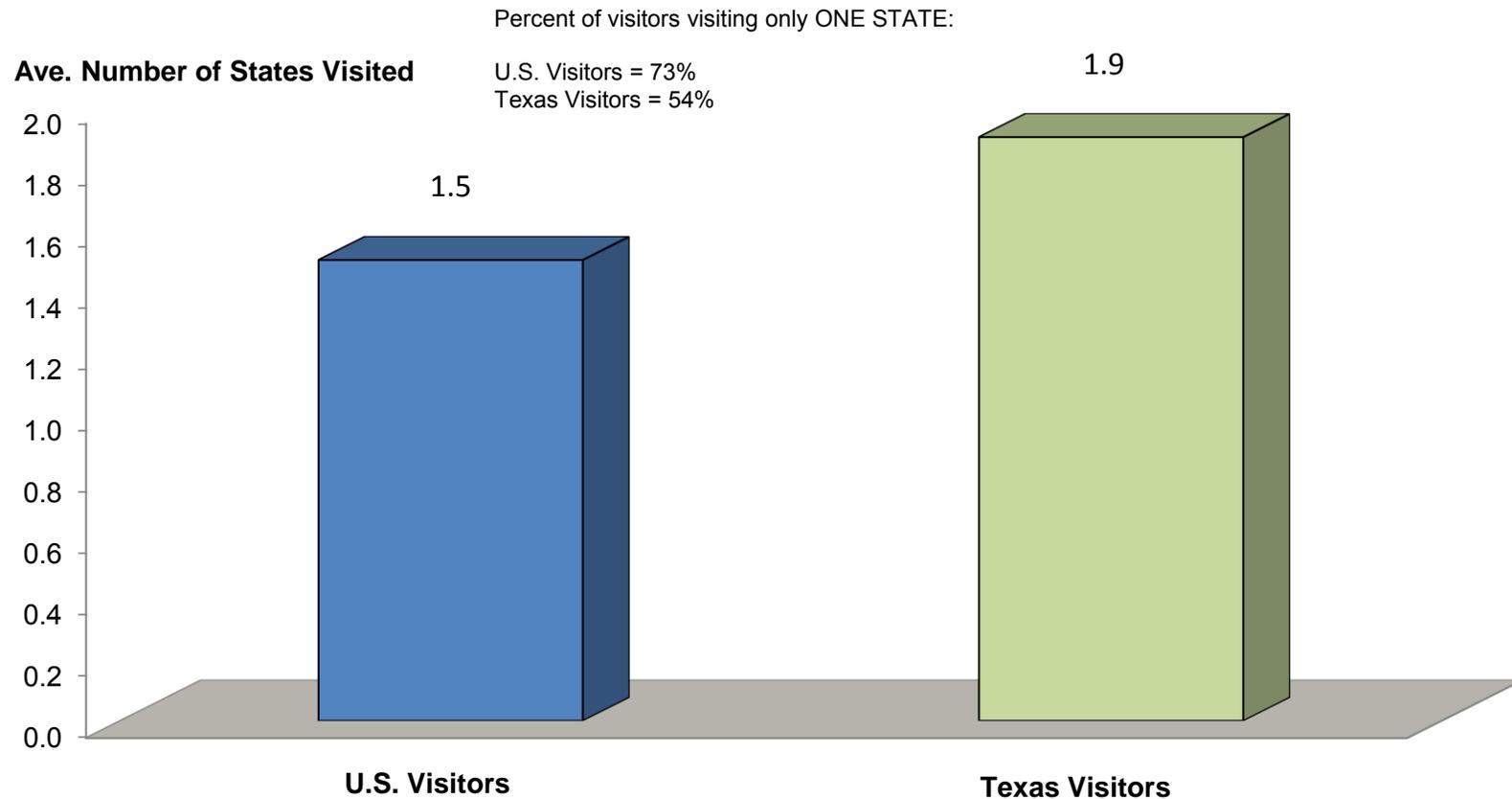
	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What U.S. Destinations did you visit (includes main destination)?** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
Number of Respondents	2,169	531	357	184	213	244	348	122	68*	424	213
Houston	55.5%	60.3%	37.5%	50.2%	68.9%	47.6%	40.1%	46.0%	37.8%	47.3%	25.1%
Dallas-Plano-Irving***	26.3%	21.3%	30.0%	23.6%	18.5%	35.9%	35.9%	36.5%	28.2%	33.3%	51.5%
Austin	11.7%	11.7%	7.3%	15.1%	11.6%	9.9%	7.4%	15.3%	18.2%	13.6%	14.1%
Los Angeles-Long Beach***	10.7%	3.8%	5.1%	5.8%	4.2%	2.8%	10.8%	22.4%	14.5%	4.6%	25.0%
New York City-WP-Wayne***	10.6%	5.0%	5.1%	7.5%	6.9%	10.8%	9.1%	11.5%	11.9%	9.0%	23.7%
San Antonio	10.5%	13.5%	11.1%	15.4%	11.2%	10.1%	6.5%	1.8%	5.7%	4.6%	9.3%
Las Vegas	7.5%	4.4%	8.2%	5.6%	4.8%	5.3%	0.8%	2.1%	3.4%	5.3%	27.5%
San Francisco***	6.5%	2.7%	5.9%	4.0%	6.4%	2.5%	4.8%	6.6%	4.0%	8.3%	16.5%
Miami***	5.7%	2.7%	2.9%	9.1%	10.0%	9.8%	3.5%	0.9%	2.6%	0.9%	7.2%
New Orleans	5.5%	9.9%	7.9%	11.9%	13.3%	0.4%	3.6%	1.7%	0.7%	0.5%	11.8%
	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What U.S. Destinations did you visit (includes main destination)?** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
Number of Respondents	123	111	110	269	312	284	1,212	1,014	650	1161	356
Houston	47.0%	34.1%	73.5%	63.2%	72.7%	61.7%	50.4%	62.3%	3.4%	62.7%	52.3%
Dallas-Plano-Irving***	22.1%	34.3%	24.6%	16.3%	15.2%	19.5%	29.4%	22.2%	27.5%	3.9%	24.1%
Austin	10.9%	17.9%	2.8%	21.8%	5.3%	14.5%	14.0%	8.9%	4.9%	4.6%	14.8%
Miami***	10.2%	-	3.3%	3.2%	10.6%	2.6%	7.2%	3.8%	9.1%	1.7%	3.6%
New Orleans	8.2%	-	2.0%	4.6%	2.3%	2.3%	7.7%	1.5%	3.5%	2.2%	12.4%
New York City-WP-Wayne***	8.0%	13.6%	5.9%	5.9%	0.8%	14.5%	13.5%	8.1%	15.8%	4.5%	6.9%
Los Angeles-Long Beach***	7.6%	20.4%	7.6%	10.6%	1.2%	3.2%	13.4%	7.3%	6.7%	5.8%	4.3%
San Antonio	7.5%	8.5%	13.7%	10.2%	5.7%	14.2%	13.9%	6.9%	3.0%	7.1%	17.7%
San Francisco***	4.2%	7.3%	-	10.5%	1.9%	1.5%	8.2%	3.6%	5.8%	5.1%	3.4%
Las Vegas	3.2%	3.2%	3.4%	5.6%	2.6%	7.4%	9.8%	3.9%	9.5%	4.2%	5.7%

** Multiple Response. City names correspond to U.S. Bureau of Census, Metropolitan Statistical Area (MSA) or Metropolitan Division (MD).

*** Cities defined by Metropolitan Division (MD). All other cities defined as Metropolitan Statistical Area (MSA).



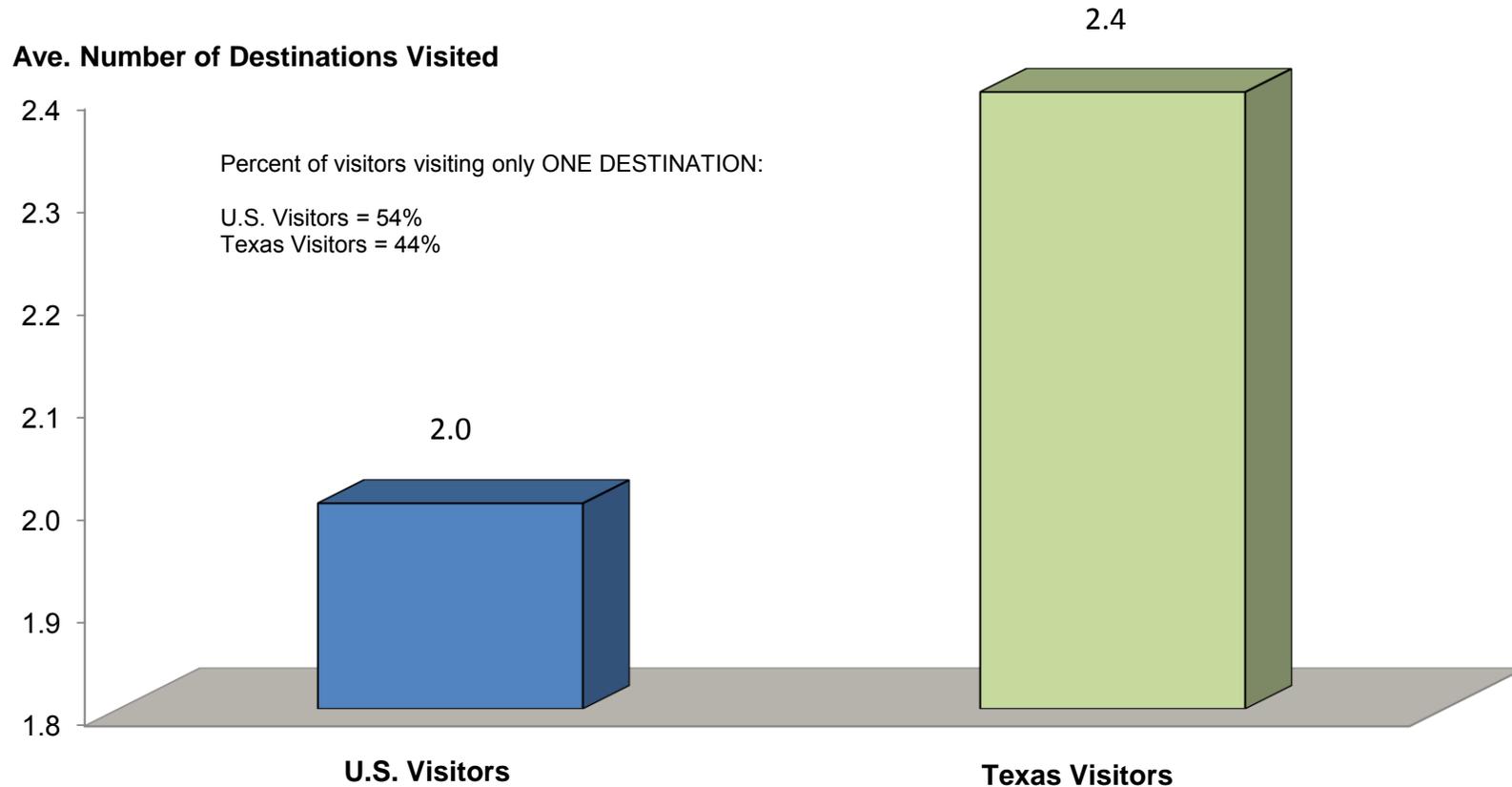
NUMBER OF STATES VISITED OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



NUMBER OF DESTINATIONS VISITED OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



NUMBER OF STATES AND DESTINATIONS VISITED OVERSEAS VISITORS TO TEXAS 2014

- Texas overseas visitors traveled to an average of 1.9 states during their entire trip in the U.S. In 2014 the number of overseas visitors to the U.S. visiting one state increased to 73%, up from 72% in 2013. Despite a high percent of visitors considering Texas as their main destination, only 54% visited only one state – well below the U.S. overseas average.
- On average overseas visitors to the U.S. visited multiple destinations (2.0 on average). By comparison, Texas overseas visitors were more likely than the U.S. on average to visit more destinations (cities) during their 2014 visit (2.4).
- This indicates that Texas and the Texas destinations have real potential to collaborate to keep visitors in Texas and visiting more destinations within Texas – especially given so many are focused on Texas as their main destination.
- The most adventurous were the Australians – visiting 3.7 destinations during their trip and 2.9 states on average.
- The least adventurous were the Colombian visitors – visiting only 2.0 destinations and only 1.6 states on average.

Texas Overseas Visitors 2014 Report



Table: Number of States and Destinations Visited

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Number of states visited.** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,169	531	357	184	213	244	348	122	68*	424	213
1 State	54.3%	65.1%	56.9%	55.7%	59.1%	52.6%	52.5%	46.0%	60.8%	59.9%	35.2%
2 States	23.0%	16.3%	19.6%	26.0%	15.8%	34.0%	29.3%	26.9%	19.0%	16.4%	13.8%
3 States	10.4%	9.7%	8.4%	7.2%	10.0%	8.7%	13.2%	12.5%	7.2%	11.9%	15.0%
4 States	5.2%	1.9%	6.4%	4.9%	3.6%	3.4%	3.2%	7.1%	5.5%	7.1%	10.3%
5 or More States	7.2%	7.0%	8.7%	6.1%	11.5%	1.3%	1.8%	7.4%	7.4%	4.7%	25.7%
Mean No. of States	1.9	1.7	2.0	1.8	2.0	1.7	1.7	2.0	1.8	1.8	2.9
Median No. of States	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	1.0	1.0	3.0

** Maximum number is eight states.

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Number of destinations visited.** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,169	531	357	184	213	244	348	122	68*	424	213
1 Destination	43.6%	52.2%	47.4%	41.5%	46.8%	44.4%	46.4%	41.8%	58.5%	52.2%	29.2%
2 Destinations	22.7%	19.6%	18.2%	16.4%	11.7%	27.9%	30.1%	23.9%	20.7%	18.3%	10.9%
3 Destinations	12.2%	10.0%	13.4%	10.3%	13.1%	12.5%	10.9%	16.5%	7.8%	10.9%	10.4%
4 Destinations	7.1%	4.2%	3.3%	6.7%	5.5%	9.8%	5.9%	6.2%	1.0%	8.9%	9.5%
5 Destinations	5.2%	4.4%	4.4%	5.7%	4.4%	3.4%	5.6%	4.5%	4.8%	6.1%	11.0%
6 Destinations	2.2%	2.6%	2.6%	12.5%	4.5%	-	0.5%	1.8%	5.8%	1.8%	7.8%
7 Destinations	6.4%	5.6%	8.6%	6.3%	14.1%	1.7%	0.6%	4.8%	1.3%	1.8%	19.1%
8 Destinations	0.6%	1.5%	2.2%	0.6%	-	0.3%	-	0.5%	-	-	2.1%
Mean No. of Destinations	2.4	2.3	2.5	2.8	2.8	2.1	2.0	2.3	2.0	2.1	3.7
Median No. of Destinations	2.0	1.0	2.0	2.0	2.0	2.0	2.0	2.0	1.0	1.0	3.0

* Denotes small sample.

** Maximum number is eight destinations.

Texas Overseas Visitors 2014 Report



Table: Number of States and Destinations Visited (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Number of states visited.** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	123	111	110	269	312	284	1,212	1,014	650	1161	356
1 State	61.0%	52.1%	53.7%	59.8%	70.6%	58.7%	46.9%	62.0%	61.9%	78.7%	58.7%
2 States	13.4%	22.8%	32.1%	22.8%	19.8%	25.7%	24.1%	22.8%	21.9%	14.4%	16.9%
3 States	4.3%	19.0%	9.7%	7.4%	8.6%	7.5%	12.6%	9.7%	8.1%	3.8%	11.8%
4 States	16.0%	5.1%	4.4%	4.1%	0.5%	1.8%	6.5%	2.5%	4.9%	2.2%	2.8%
5 or More States	5.3%	1.0%	-	5.9%	0.4%	6.3%	9.9%	3.0%	3.2%	1.0%	9.9%
Mean No. of States	2.0	1.8	1.6	1.8	1.4	1.8	2.1	1.6	1.7	1.3	1.9
Median No. of States	1.0	1.0	1.0	1.0	1.0	1.0	2.0	1.0	1.0	1.0	1.0

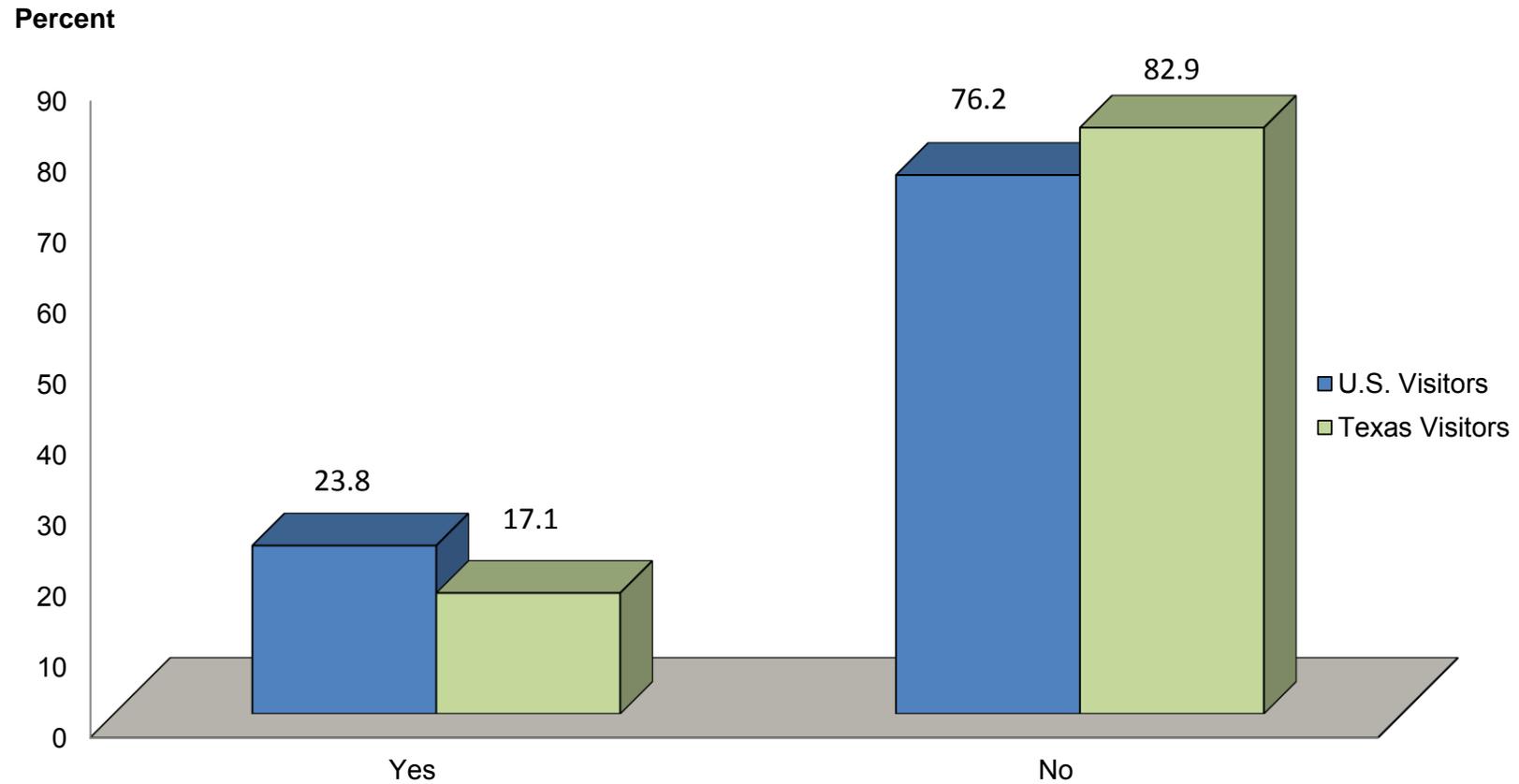
** Maximum number is eight states.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Number of destinations visited.** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	123	111	110	269	312	284	1,212	1,014	650	1161	356
1 Destination	48.9%	49.8%	38.4%	41.6%	54.9%	41.8%	34.2%	53.5%	46.4%	62.7%	43.5%
2 Destinations	14.8%	19.2%	33.4%	22.8%	26.2%	30.0%	22.9%	23.7%	23.4%	20.0%	20.8%
3 Destinations	10.5%	21.1%	20.7%	15.8%	7.5%	12.9%	13.5%	13.8%	15.7%	7.5%	10.6%
4 Destinations	12.2%	5.7%	7.1%	6.8%	8.3%	5.4%	9.1%	3.9%	5.9%	4.0%	5.7%
5 Destinations	1.1%	2.4%	-	3.6%	2.1%	4.8%	6.6%	2.3%	4.6%	2.9%	5.8%
6 Destinations	-	1.9%	-	2.7%	0.8%	1.0%	3.1%	1.0%	0.4%	1.4%	3.6%
7 Destinations	12.2%	-	0.4%	5.9%	0.2%	4.0%	9.6%	1.8%	3.5%	1.5%	7.9%
8 Destinations	0.5%	-	-	0.8%	-	-	0.9%	-	0.1%	0.1%	2.1%
Mean No. of Destinations	2.5	2.0	2.0	2.4	1.8	2.2	2.8	1.9	2.1	1.8	2.6
Median No. of Destinations	2.0	2.0	2.0	2.0	1.0	2.0	2.0	1.0	2.0	1.0	2.0

** Maximum number is eight destinations.



FIRST TRIP BY AIR TO THE U.S. OVERSEAS VISITORS TO TEXAS / U.S. 2014



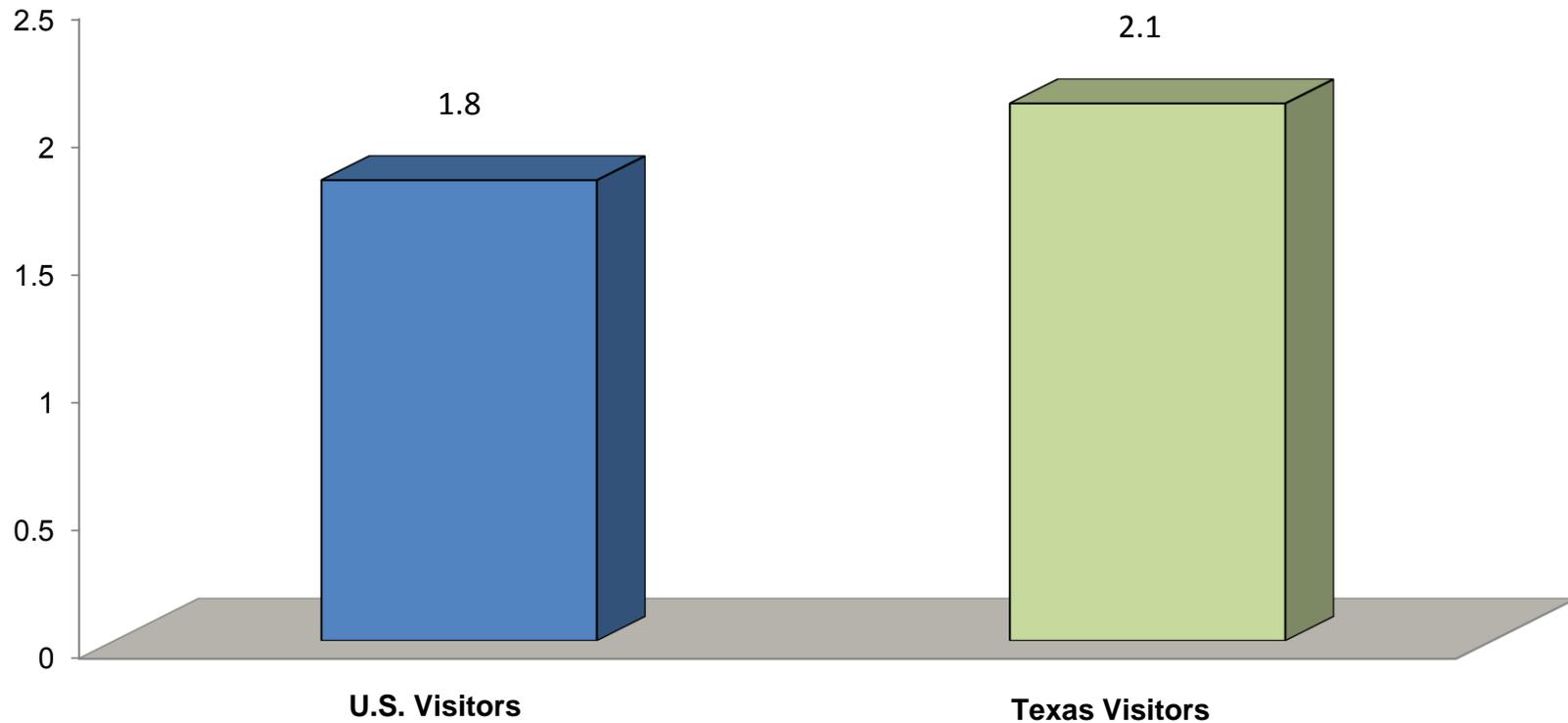
Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



TRIPS TO THE U.S. IN PAST 12 MONTHS

OVERSEAS VISITORS TO TEXAS / U.S.
2014

Ave. Number of TRIPS



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



FIRST AIR TRIP AND AIR TRIPS IN LAST 12 MONTHS OVERSEAS VISITORS TO TEXAS 2014

- In 2014 the percent of first-time visitors increased slightly (up 0.1 points)
- In 2014 Texas attracted more first-time visitors (17%), up slightly from 16% in 2013, but well down from 19.7% in 2011. By comparison, Texas has a significantly higher portion of repeat visitors and a relatively small portion of first-time visitors compared to the U.S. overall. This is an indicator that Texas product awareness could be expanded to first-time travelers in both traditional and emerging markets.
- Not surprising, some of the emerging markets have a much higher percentage that are first-time travelers compared to the traditional markets. China, India, Australia, Taiwan, and South Korea all had a much stronger portion of first-time visitors compared to the other key Texas markets.

Texas Overseas Visitors 2014 Report



Table: First Air Trip and Air Trips in Last 12 Months

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Was this your first trip by air to the United States? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,896	480	321	171	190	218	307	108	61*	361	204
Yes	17.1%	10.9%	17.1%	18.1%	11.8%	11.2%	7.8%	21.0%	23.8%	30.5%	28.3%
No	82.9%	89.1%	82.9%	81.9%	88.2%	88.8%	92.2%	79.0%	76.2%	69.5%	71.7%

* Denotes small sample.

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How many round trips by air have you made to the U.S. in the past 12 months? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,763	448	298	161	180	195	297	106	61*	341	187
1 Trip	49.8%	50.9%	53.4%	56.3%	50.9%	43.4%	41.2%	47.5%	41.7%	64.0%	76.6%
2 - 3 Trips	37.8%	40.8%	29.4%	29.3%	41.5%	39.7%	31.3%	47.2%	50.9%	29.1%	20.7%
4 - 5 Trips	5.7%	5.3%	8.0%	5.1%	5.7%	7.7%	11.2%	2.3%	1.9%	5.1%	2.6%
6 - 10 Trips	6.4%	2.5%	8.7%	8.8%	1.6%	8.8%	14.6%	3.0%	5.4%	1.8%	0.1%
11 or More Trips	0.3%	0.5%	0.4%	0.5%	0.3%	0.4%	1.8%	-	-	-	-
Mean No. of Trips	2.1	1.9	2.3	2.2	1.9	2.4	2.9	1.8	2.0	1.6	1.3
Median No. of Trips	2.0	1.0	1.0	1.0	1.0	2.0	2.0	2.0	2.0	1.0	1.0

* Denotes small sample.

Texas Overseas Visitors 2014 Report



Table: First Air Trip and Air Trips in Last 12 Months (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Was this your first trip by air to the United States? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	109	105	77*	246	256	244	1,046	923	599	1102	320
Yes	11.0%	23.8%	12.7%	11.4%	5.8%	24.3%	18.0%	14.9%	23.6%	14.9%	11.3%
No	89.0%	76.2%	87.3%	88.6%	94.2%	75.7%	82.0%	85.1%	76.4%	85.1%	88.7%

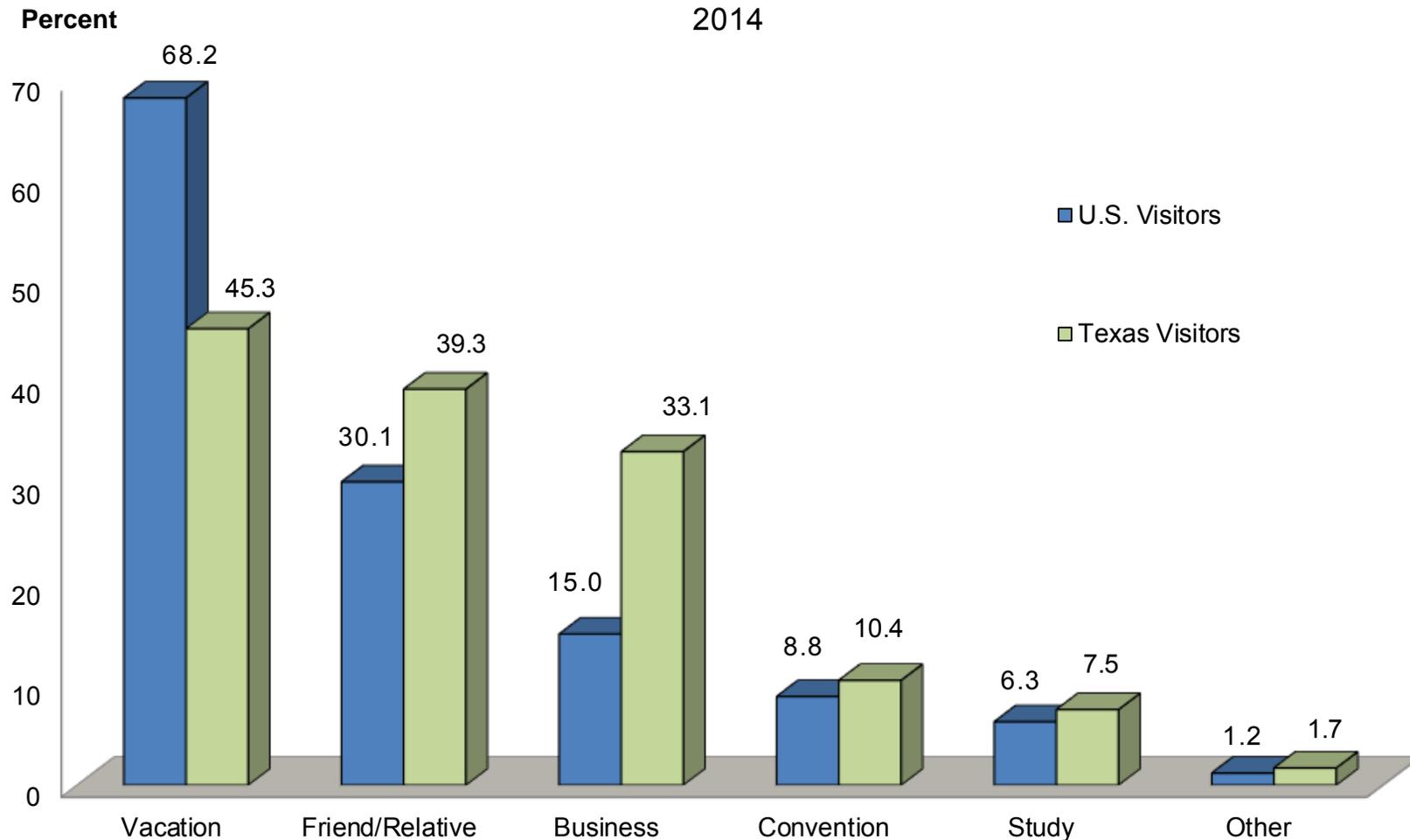
* Denotes small sample.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How many round trips by air have you made to the U.S. in the past 12 months? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	99*	100	71*	230	225	219	971	867	568	1001	296
1 Trip	52.9%	53.8%	33.4%	51.8%	27.8%	48.9%	53.7%	43.3%	52.7%	44.8%	56.9%
2 - 3 Trips	28.2%	33.8%	42.1%	35.6%	45.6%	40.2%	36.5%	38.1%	37.3%	39.2%	38.2%
4 - 5 Trips	15.2%	4.3%	18.6%	7.1%	15.0%	7.6%	5.3%	7.8%	6.7%	8.3%	4.6%
6 - 10 Trips	3.6%	6.9%	5.9%	5.4%	8.9%	3.3%	4.4%	10.1%	3.3%	7.2%	0.3%
11 or More Trips	-	1.1%	-	-	2.7%	-	-	0.7%	-	0.5%	-
Mean No. of Trips	2.1	2.1	2.6	2.1	3.0	2.0	1.9	2.5	1.9	2.3	1.6
Median No. of Trips	1.0	1.0	2.0	1.0	2.0	2.0	1.0	2.0	1.0	2.0	1.0

* Denotes small sample.



PURPOSE OF U.S. TRIP* OVERSEAS VISITORS TO TEXAS/U.S. 2014

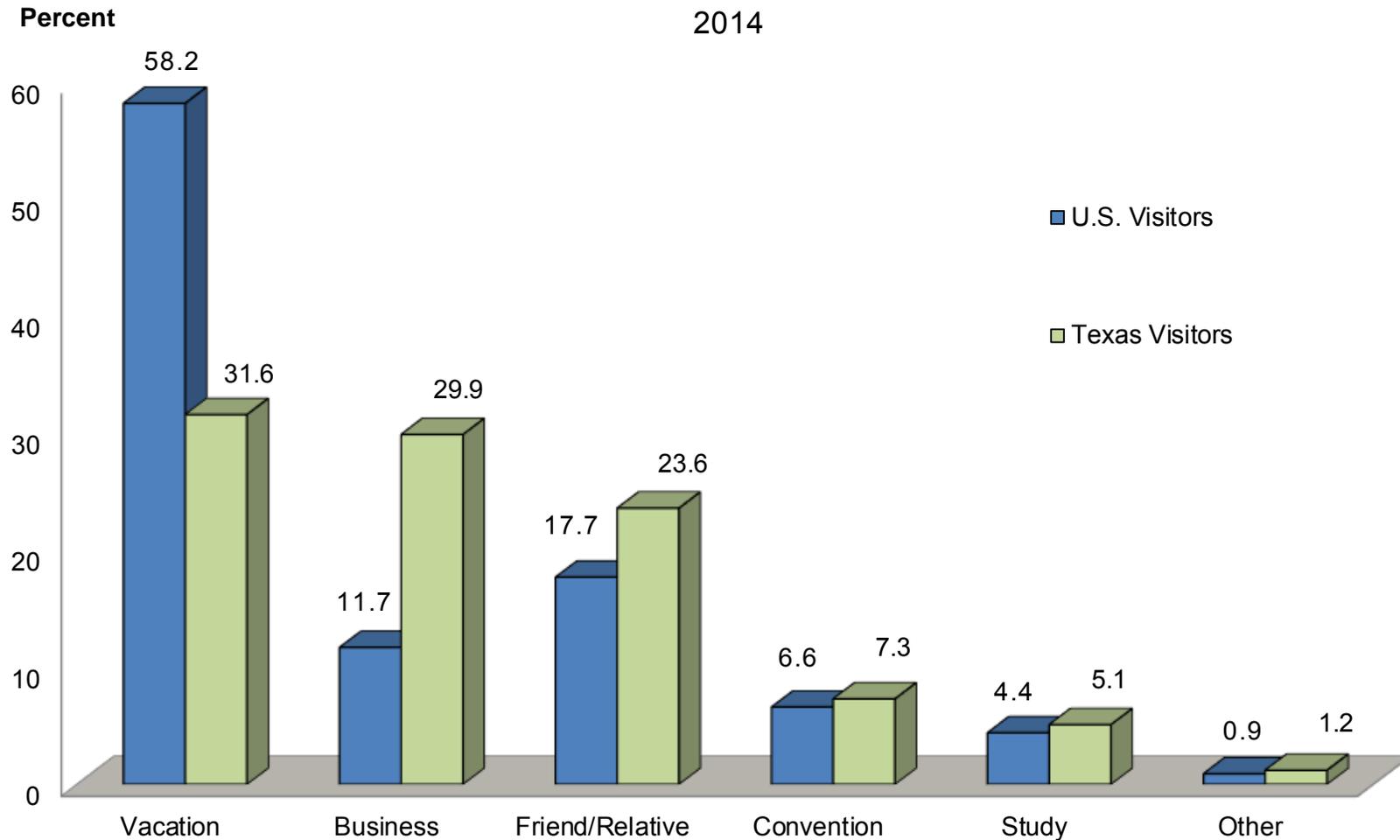


Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014

* = multiple response



MAIN PURPOSE OF U.S. TRIP OVERSEAS VISITORS TO TEXAS/U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



PURPOSE OF TRIP OVERSEAS VISITORS TO TEXAS 2014

- Main purpose of trip: Leisure travel was listed as the main purpose of trip by 32% of the overseas visitors to Texas in 2014. Business travel was listed as the primary purpose of trip by 30% of the overseas visitors. Visiting friends and relatives rounded out the top three at 24 percent. Convention travel accounted for 7% of the visitors and 5% listed education as the main purpose of trip.
- Visitors from Taiwan had the largest share of visitors primarily traveling for business (53%). Japan was a close second (47%), followed by India (43%), Colombia (38%), and China (37%). In contrast, Australia – the leisure-focused traveler – had only 10% of the visitors indicating they were primarily visiting Texas for business. By comparison, only 12% of the U.S. overseas visitors were primarily visiting for business. Clearly, Texas has a substantially higher percent of business visitors compared to the U.S. overall.
- Destinations with the highest percent of visitors listing leisure as the main purpose of trip included: Australia (50%) and the Netherlands (38%). Even the high percentage from Australia and the Netherlands is below the U.S. average of 58% as a main purpose of trip.
- The strong share of business visitors currently coming to Texas results in a higher share visiting friends and relatives as the business travelers make connections during their stay. As indicated above, 24% of the state's overseas visitors indicated their main purpose of trip was to visit friends and relatives. By comparison, the U.S. average is only 18 percent.
- Purpose of Trip (multiple response): In 2014 45% of the overseas visitors to Texas indicated that at some point during their stay they traveled for leisure (vacation/holiday). Given only 32% indicated their main purpose of trip was for leisure, approximately 13% of the business, convention, and VFR travelers decided to extend their stay for leisure. By comparison, only about 10% of the U.S. business, convention, and VFR travelers extended their stay for leisure travel.
- In 2014 visitors from the Netherlands were most likely to extend their stay. Visitors from India were least likely to extend their stay.
- Developing strategies to encourage business and convention travelers to Texas to extend their visit for leisure could have significant impact for the state.

Texas Overseas Visitors 2014 Report



Table: Purpose of Trip (multiple response)

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
All purpose(s) of trip.*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,123	525	352	183	209	242	340	119	67*	408	212
Business**	33.1%	26.5%	30.7%	20.5%	27.2%	39.7%	50.4%	40.2%	36.9%	47.9%	12.2%
Convention/Conference/Trade Show	10.4%	8.8%	9.8%	6.0%	13.8%	15.4%	30.2%	14.9%	12.4%	14.0%	10.7%
Education	7.5%	2.8%	3.5%	4.4%	5.9%	9.5%	6.1%	20.6%	22.4%	7.0%	4.7%
Health Treatment	1.6%	0.8%	1.3%	-	0.1%	0.8%	-	-	-	0.7%	0.3%
Vacation/Holiday	45.3%	47.0%	50.3%	54.5%	54.1%	38.8%	19.0%	26.9%	34.1%	16.4%	66.1%
Religion/Pilgrimage	0.6%	0.5%	0.3%	-	-	0.8%	0.7%	0.5%	0.8%	0.2%	0.6%
Visit Friends/Relatives	39.3%	47.3%	43.5%	44.0%	39.7%	27.5%	17.4%	29.6%	39.8%	36.9%	42.4%
Other	1.7%	2.3%	3.1%	3.4%	3.2%	1.7%	2.6%	-	1.2%	4.5%	1.0%

* Denotes small sample.

** Includes: Visit customer, Visit supplier, Sales/marketing, and/or Internal company meeting.

*** Multiple Response.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
All purpose(s) of trip.*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	122	110	107	267	300	274	1,212	1,014	675	1236	356
Business**	36.2%	58.3%	39.0%	37.4%	17.3%	39.1%	7.9%	83.0%	20.7%	33.8%	4.2%
Convention/Conference/Trade Show	9.7%	19.6%	12.9%	15.8%	4.9%	14.9%	5.0%	26.0%	12.0%	12.5%	3.0%
Education	10.6%	3.6%	9.8%	9.1%	5.5%	11.6%	4.9%	4.6%	11.4%	8.3%	1.8%
Health Treatment	-	-	0.8%	0.3%	6.4%	5.0%	1.7%	-	1.6%	2.3%	0.3%
Vacation/Holiday	43.9%	17.4%	38.0%	41.6%	55.7%	36.1%	71.3%	11.3%	55.5%	39.1%	66.4%
Religion/Pilgrimage	0.9%	-	-	0.4%	1.0%	0.4%	0.7%	0.7%	0.4%	1.2%	0.4%
Visit Friends/Relatives	25.5%	36.2%	38.4%	40.5%	57.8%	40.4%	61.8%	11.7%	36.0%	36.3%	66.9%
Other	0.5%	1.3%	1.6%	2.6%	2.6%	1.6%	0.8%	1.0%	1.7%	2.2%	2.1%

** Includes: Visit customer, Visit supplier, Sales/marketing, and/or Internal company meeting.

*** Multiple Response.

Texas Overseas Visitors 2014 Report



Table: Main Purpose of Trip

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What was the main purpose of your trip? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,926	489	320	172	187	221	320	111	63*	354	199
Business**	29.9%	23.9%	27.4%	18.3%	25.3%	34.8%	46.5%	36.7%	34.2%	43.0%	10.4%
Convention/Conference/Trade Show	7.3%	7.3%	6.9%	4.9%	7.9%	11.8%	27.9%	14.5%	10.9%	7.2%	10.6%
Education	5.1%	1.9%	0.9%	4.5%	4.1%	5.4%	4.2%	19.2%	14.5%	5.1%	1.4%
Health Treatment	1.1%	0.5%	0.7%	-	-	0.9%	-	-	-	0.4%	0.3%
Vacation/Holiday	31.6%	30.2%	32.2%	36.7%	38.4%	25.7%	11.0%	13.2%	17.5%	9.4%	50.1%
Religion/Pilgrimage	0.1%	-	-	-	-	0.3%	-	-	0.8%	0.3%	-
Visit Friends/Relatives	23.6%	34.6%	29.2%	33.3%	22.2%	19.4%	7.6%	16.5%	20.8%	29.9%	26.1%
Other	1.2%	1.6%	2.7%	2.3%	2.0%	1.7%	2.7%	-	1.2%	4.6%	1.1%

* Denotes small sample.

** Includes: Visit customer, Visit supplier, Sales/marketing, and/or Internal company meeting.

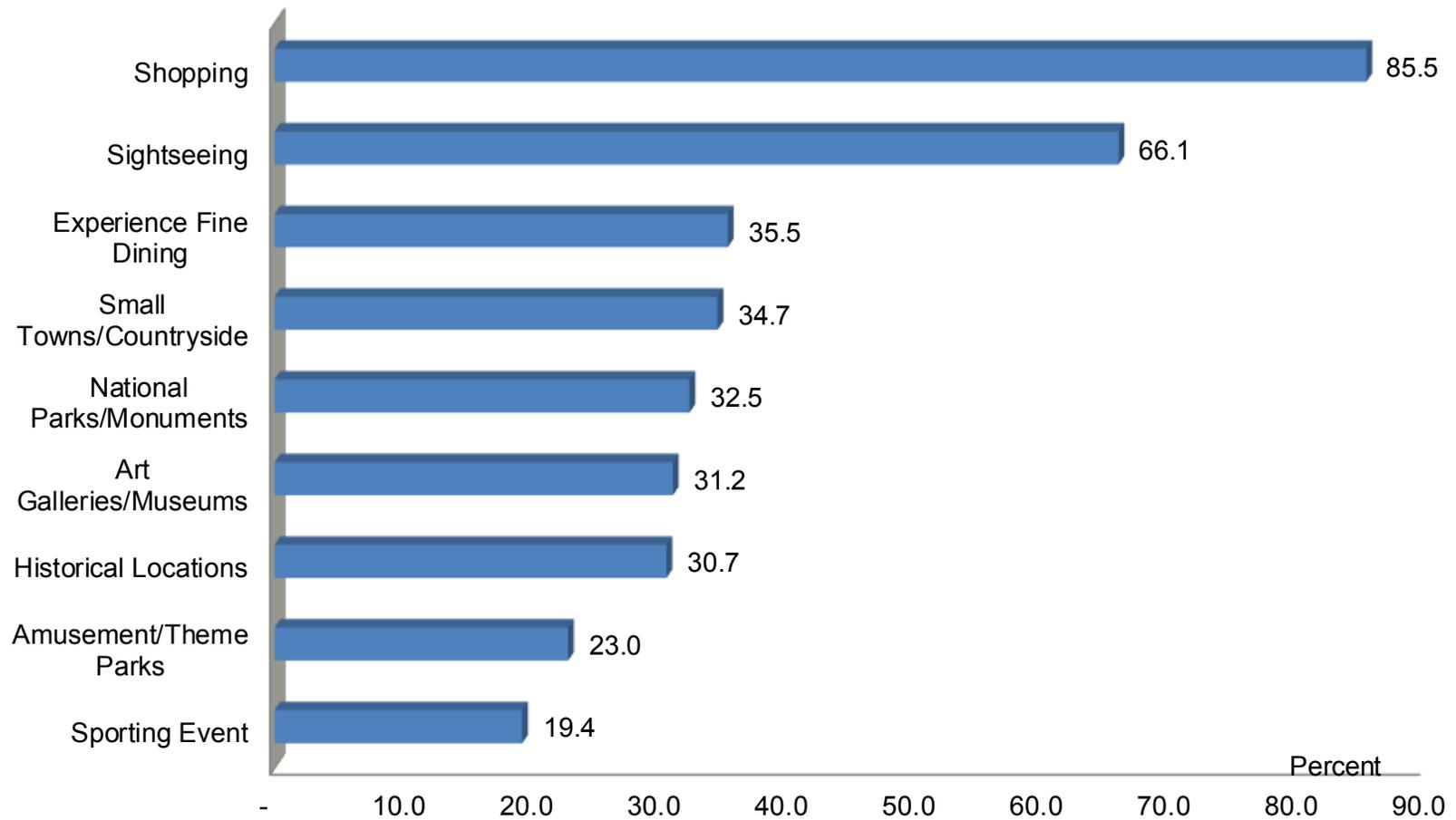
	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What was the main purpose of your trip? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	107	102	95*	241	266	238	1,102	896	634	1116	330
Business**	34.0%	52.7%	37.9%	31.5%	14.2%	31.5%	5.0%	75.8%	17.4%	30.5%	2.4%
Convention/Conference/Trade Show	7.5%	11.1%	1.2%	12.3%	4.6%	13.1%	3.5%	18.6%	8.6%	8.9%	2.9%
Education	7.5%	2.6%	7.5%	4.1%	3.0%	7.8%	2.4%	1.2%	8.1%	6.3%	1.1%
Health Treatment	-	-	0.9%	-	4.9%	3.9%	1.1%	-	1.2%	1.2%	-
Vacation/Holiday	34.1%	4.5%	23.4%	23.5%	31.0%	14.5%	50.0%	3.2%	39.0%	26.8%	42.8%
Religion/Pilgrimage	-	-	-	-	0.8%	-	0.1%	0.1%	-	0.1%	-
Visit Friends/Relatives	16.3%	27.7%	27.2%	27.4%	40.6%	29.0%	37.3%	1.0%	24.5%	23.9%	48.9%
Other	0.6%	1.3%	1.8%	1.3%	1.0%	0.2%	0.5%	0.1%	1.2%	2.3%	1.9%

* Denotes small sample.

** Includes: Visit customer, Visit supplier, Sales/marketing, and/or Internal company meeting.



LEISURE-RECREATION ACTIVITIES OVERSEAS VISITORS TO TEXAS 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014

* = multiple response



LEISURE-RECREATION ACTIVITIES OVERSEAS VISITORS TO TEXAS 2014

- In 2014 shopping was the top visitor activity reported by overseas visitors. Many of the visitors from emerging markets, especially China and Brazil, sought out good deals while traveling in Texas. However, traditional markets (such as the UK) were also strong – especially for leisure visitors. The strongest shoppers in terms of percent were Colombians. In contrast, travelers from Italy had the smallest proportion of travelers listing shopping as an activity.
- Sightseeing was listed as the second largest activity – although not directly comparable to last year due to the single year response, it also ranked second in 2013. The Germans were most interested in sightseeing compared to the other top markets. In contrast, the Italians were least interested in sightseeing comparably.
- Experiencing fine dining ranked third, the same as in 2013. Travelers from France were most interested in experiencing fine dining compared to the other top markets. In contrast, visitors from Italy were least interested in experiencing fine dining (only 18% listed it as a leisure activity, which was significantly lower than the other markets).
- The other top activities included: visiting small towns/countryside, national parks/monuments, art gallery/museums, visiting historical places, amusement/theme parks, and attending sporting events.

Texas Overseas Visitors 2014 Report



Table: Leisure-Recreation Activities

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Did anyone engage in any of the following leisure activities? ** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,673	434	290	151	169	199	208	99*	59*	265	196
American Indian Communities	5.8%	1.9%	5.1%	7.6%	4.1%	1.5%	1.5%	1.4%	9.1%	10.4%	9.5%
Amusement/Theme Parks	23.0%	16.3%	17.3%	21.7%	28.7%	27.0%	5.9%	8.8%	16.0%	23.1%	28.9%
Art Galleries/Museums	31.2%	28.7%	20.6%	41.1%	32.5%	29.2%	15.7%	32.0%	30.4%	23.5%	51.9%
Camping/Hiking	4.9%	4.6%	8.8%	8.1%	6.9%	1.8%	0.5%	2.3%	2.3%	3.4%	8.1%
Casino/Gamble	7.9%	8.4%	8.0%	10.8%	5.5%	5.2%	1.1%	2.8%	6.9%	4.8%	24.4%
Concert/Play/Musical	13.2%	13.3%	13.9%	13.8%	9.8%	14.1%	6.1%	7.4%	19.1%	11.4%	37.6%
Cultural/Ethnic Heritage Sights	15.9%	15.4%	15.5%	19.8%	17.2%	11.6%	14.0%	13.7%	15.9%	11.5%	34.5%
Environmental/Eco. Excursions	3.1%	3.0%	6.3%	7.9%	0.9%	0.4%	0.9%	4.9%	2.6%	1.8%	9.7%
Experience Fine Dining	35.5%	39.3%	32.7%	51.5%	30.4%	18.4%	27.1%	42.9%	40.6%	31.8%	47.0%
Golfing/Tennis	4.7%	6.8%	2.6%	3.2%	5.3%	1.8%	7.2%	5.6%	10.1%	2.8%	6.6%
Guided Tour(s)	18.3%	21.6%	18.3%	19.0%	19.6%	8.1%	11.2%	9.6%	8.1%	12.0%	48.2%
Historical Locations	30.7%	30.9%	36.1%	39.7%	44.3%	27.5%	14.6%	13.5%	23.8%	25.7%	51.3%
Hunting/Fishing	2.7%	4.2%	1.9%	2.8%	4.1%	0.8%	-	3.1%	3.4%	1.2%	4.0%
National Parks/Monuments	32.5%	36.5%	41.6%	45.5%	39.3%	33.0%	12.9%	13.2%	28.7%	28.5%	51.6%
Nightclubbing/Dancing	18.2%	19.5%	14.0%	10.4%	16.3%	29.0%	5.0%	6.8%	11.4%	15.1%	33.8%
Shopping	85.5%	82.5%	83.4%	90.9%	81.5%	89.8%	74.7%	85.1%	83.1%	83.0%	90.7%
Sightseeing	66.1%	68.7%	71.5%	71.4%	71.2%	51.3%	56.0%	59.9%	67.1%	68.4%	88.6%
Small Towns/Countryside	34.7%	40.3%	44.7%	44.9%	45.2%	20.6%	14.2%	22.8%	25.2%	27.3%	53.0%
Snow Sports	1.5%	1.2%	0.4%	0.6%	0.3%	2.5%	-	0.3%	-	1.0%	5.2%
Sporting Event	19.4%	24.4%	17.2%	19.5%	17.7%	20.6%	18.0%	17.8%	11.4%	7.1%	30.1%
Water Sports	7.4%	8.1%	9.3%	14.5%	3.1%	2.9%	0.3%	5.5%	11.1%	4.4%	6.2%
Other	2.3%	4.7%	4.6%	5.3%	5.7%	3.1%	0.9%	2.3%	1.7%	2.0%	2.1%

* Denotes small sample.

** Multiple Response.

Texas Overseas Visitors 2014 Report



Table: Leisure-Recreation Activities (continued)

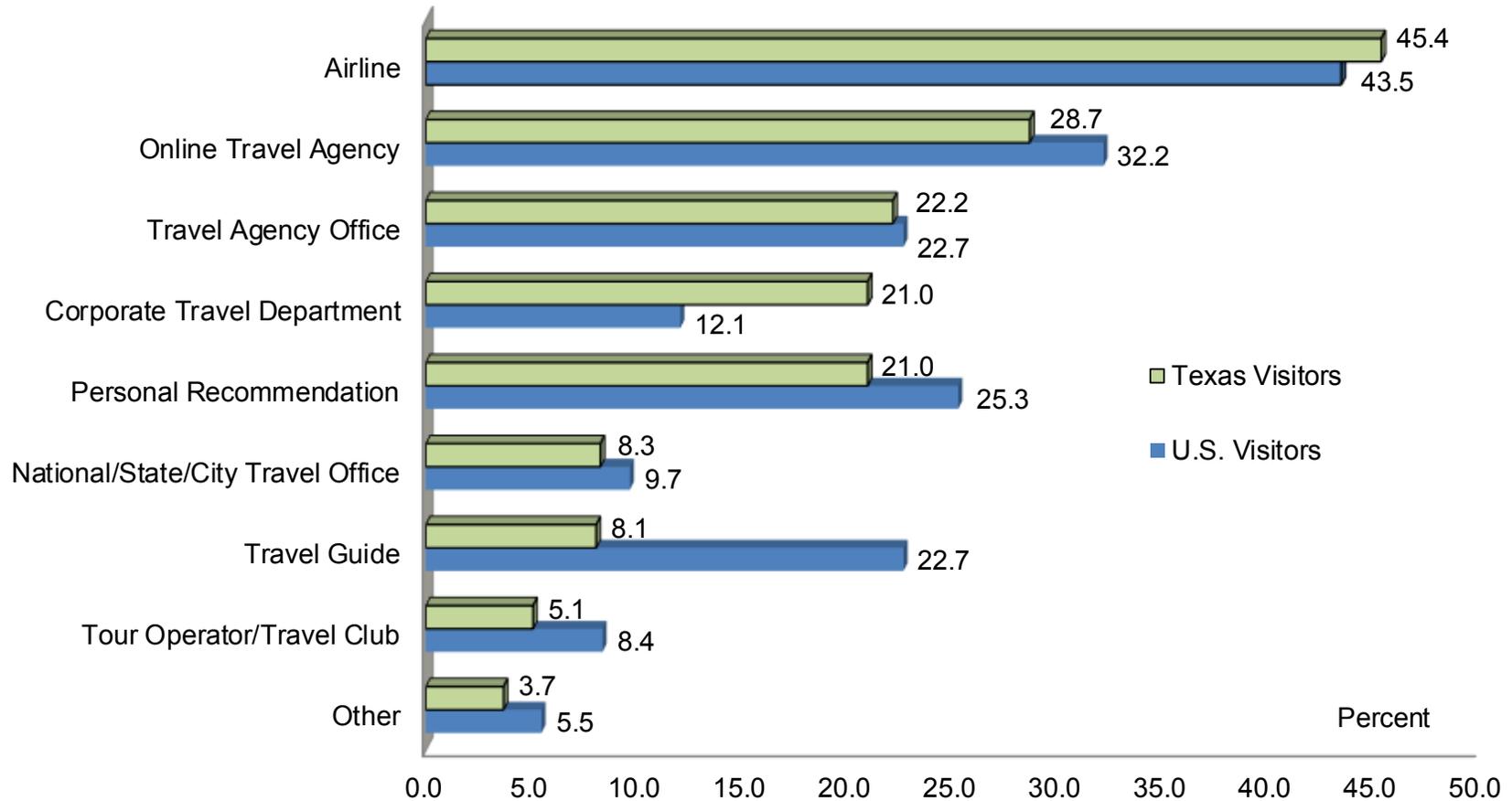
	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Did anyone engage in any of the following leisure activities? ** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	100	93*	81*	221	242	217	1,028	730	554	937	318
American Indian Communities	8.0%	-	6.1%	3.4%	0.9%	3.7%	6.9%	2.7%	6.0%	3.5%	2.2%
Amusement/Theme Parks	21.4%	10.1%	33.7%	26.6%	30.8%	30.9%	29.5%	12.5%	28.9%	23.1%	21.0%
Art Galleries/Museums	38.5%	20.0%	31.6%	25.9%	26.2%	26.3%	34.8%	24.3%	30.0%	26.5%	33.6%
Camping/Hiking	4.1%	10.5%	0.8%	6.3%	3.8%	3.3%	6.2%	2.1%	5.9%	3.4%	6.1%
Casino/Gamble	6.2%	9.3%	0.2%	9.2%	2.9%	2.4%	10.4%	3.1%	9.1%	4.5%	9.1%
Concert/Play/Musical	13.2%	5.0%	11.6%	12.4%	11.4%	9.7%	16.5%	7.0%	18.7%	10.0%	16.7%
Cultural/Ethnic Heritage Sights	21.3%	7.0%	12.7%	15.2%	15.0%	11.1%	20.1%	7.0%	19.9%	9.6%	19.0%
Environmental/Eco. Excursions	4.9%	3.4%	3.9%	1.5%	1.3%	1.8%	4.1%	0.7%	7.0%	2.1%	4.0%
Experience Fine Dining	18.2%	28.6%	45.7%	41.5%	39.5%	32.6%	37.2%	35.1%	36.3%	32.5%	41.7%
Golfing/Tennis	4.4%	3.8%	1.5%	3.9%	2.8%	2.4%	3.9%	6.0%	4.6%	6.6%	7.1%
Guided Tour(s)	23.5%	5.5%	13.7%	17.4%	3.3%	10.6%	24.2%	8.7%	23.4%	13.0%	27.7%
Historical Locations	33.9%	14.6%	20.0%	30.1%	11.5%	25.1%	37.6%	17.6%	29.5%	22.1%	39.3%
Hunting/Fishing	1.2%	-	0.6%	1.3%	3.1%	1.8%	3.4%	1.5%	4.2%	2.2%	5.2%
National Parks/Monuments	35.9%	20.3%	29.7%	31.2%	20.4%	37.1%	41.2%	17.0%	39.0%	28.2%	44.8%
Nightclubbing/Dancing	16.4%	5.7%	20.9%	26.3%	11.3%	11.4%	19.8%	12.5%	18.9%	15.6%	20.7%
Shopping	70.6%	86.3%	91.0%	90.1%	88.0%	91.0%	88.0%	84.1%	85.7%	84.8%	85.8%
Sightseeing	50.7%	63.4%	71.6%	57.9%	58.5%	63.7%	76.6%	51.7%	72.9%	59.1%	79.7%
Small Towns/Countryside	36.5%	17.5%	43.5%	43.2%	31.0%	34.9%	42.4%	19.5%	31.5%	24.8%	50.4%
Snow Sports	0.7%	3.2%	2.1%	0.2%	1.6%	0.1%	2.1%	0.2%	2.8%	2.0%	1.6%
Sporting Event	20.1%	18.9%	10.8%	18.9%	13.0%	13.2%	21.0%	14.0%	21.8%	20.0%	25.4%
Water Sports	4.2%	4.6%	7.9%	13.4%	4.1%	2.8%	9.7%	2.6%	10.1%	4.7%	9.8%
Other	1.6%	2.3%	-	4.6%	3.4%	1.0%	2.4%	1.5%	2.2%	2.3%	5.3%

* Denotes small sample.

** Multiple Response.



TRAVEL INFORMATION SOURCES* OVERSEAS VISITORS TO TEXAS/U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014

* = multiple response



U.S. TRIP INFORMATION SOURCES OVERSEAS VISITORS TO TEXAS 2014

- In 2014 the top information source used by overseas visitors was through airlines (45%). This includes print, phone, and web information distributed by the airlines. Airlines as an information source was only slightly higher for Texas compared to the U.S. overall (44%).
- The second largest source for travel information was online travel agencies (29%) – this includes traditional tour operators/travel agents as well as those that are only online travel agencies such as Expedia.
- Traditional travel agency offices were listed as an information source by 22% of the overseas visitors to Texas, just below the U.S. average at 23 percent. It should be noted that often traditional agencies operate and distribute information both on location and online and the consumer is often unaware of the differences.
- The strong business travel segment propelled the use of corporate travel departments as an information source (21%). Texas had a higher percent using corporate travel offices compared to the U.S. (12%). This segment could be examined further to determine if the state can establish more programs to extend business travelers' length of stay and to encourage family to travel with business travelers.
- Visitors to Texas from the Netherlands (60%) and Brazil (55%) had the highest propensity to seek out information from the airlines. In contrast, travelers from South Korea were least likely to seek out travel information from an airline source.
- Similarly, Australian travelers had the highest propensity to gather information from online travel agencies (40%). Travelers from Brazil, China, India, Japan, and Taiwan were much less likely to use an online travel agency to gather trip information.

Texas Overseas Visitors 2014 Report



Table: Information Sources

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How did you obtain the information used for planning this trip?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,113	518	347	182	210	241	335	122	65*	403	213
Airline	45.4%	48.5%	42.4%	49.7%	60.0%	54.9%	37.8%	42.1%	22.8%	46.6%	39.4%
Corporate Travel Department	21.0%	21.2%	21.2%	17.8%	23.4%	26.9%	11.4%	28.6%	19.0%	41.7%	13.1%
National/State/City Travel Office	8.3%	3.1%	5.4%	6.0%	12.4%	19.6%	6.8%	5.4%	3.3%	6.7%	5.8%
Online Travel Agency	28.7%	33.2%	28.3%	33.6%	28.3%	15.1%	17.3%	20.6%	30.2%	15.3%	39.8%
Personal Recommendation	21.0%	17.9%	18.6%	22.1%	17.8%	23.4%	9.5%	18.8%	17.2%	21.2%	30.2%
Tour Operator/Travel Club	5.1%	6.4%	3.2%	10.0%	4.2%	6.9%	5.6%	1.5%	1.3%	8.5%	10.3%
Travel Agency Office	22.2%	13.5%	25.3%	12.3%	15.9%	18.0%	42.7%	13.4%	23.5%	24.5%	36.6%
Travel Guide	8.1%	5.8%	8.2%	12.9%	9.4%	4.0%	10.5%	5.1%	1.9%	6.2%	10.2%
Other	3.7%	4.5%	5.3%	2.9%	3.3%	3.5%	4.9%	3.7%	5.3%	5.4%	5.4%

* Denotes small sample.

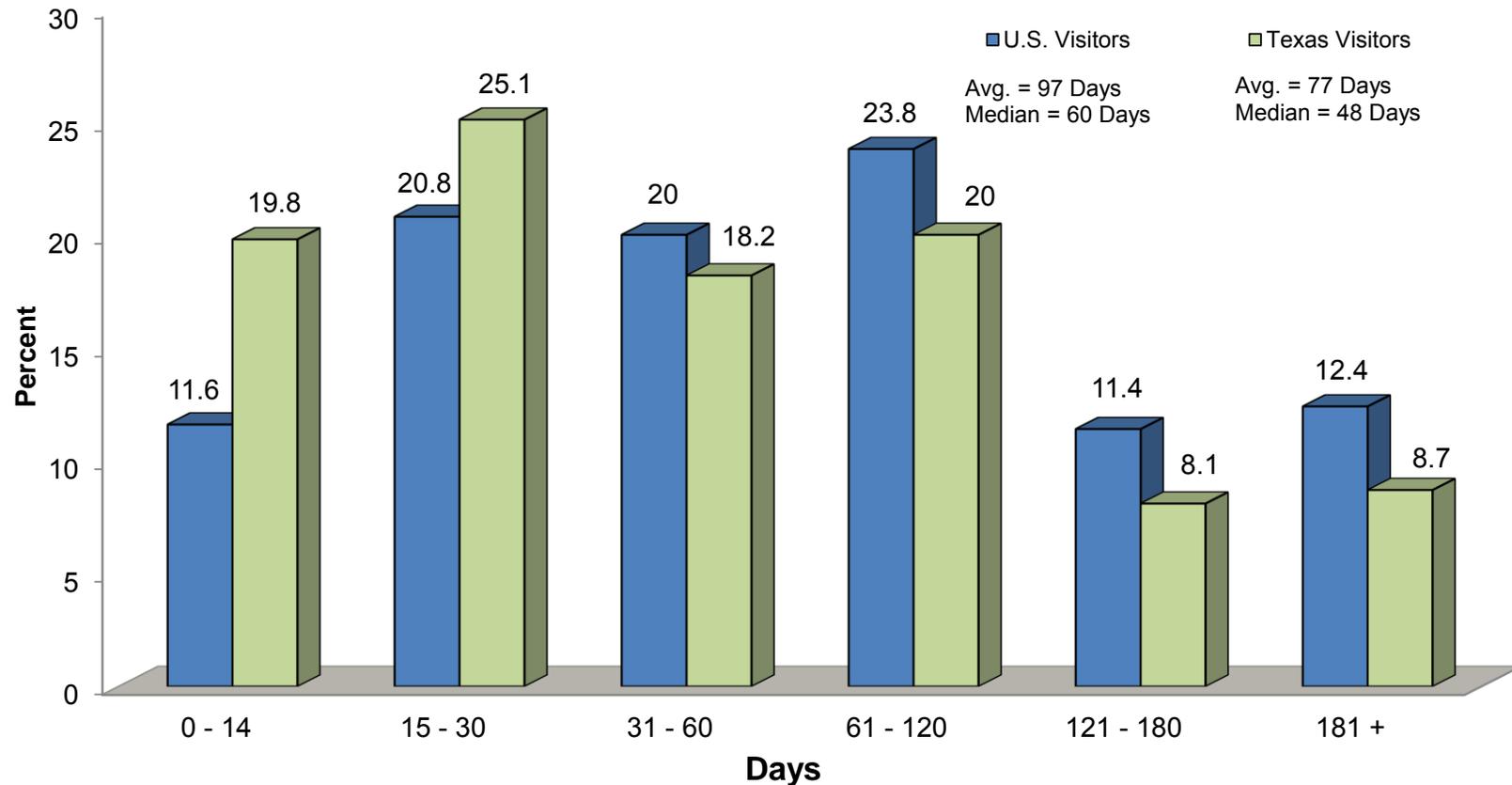
** Multiple Response.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How did you obtain the information used for planning this trip?*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	121	108	107	266	302	272	1,185	995	664	1237	348
Airline	45.4%	54.8%	48.5%	42.4%	49.7%	60.0%	54.9%	37.8%	42.1%	22.8%	46.6%
Corporate Travel Department	21.0%	8.5%	21.2%	21.2%	17.8%	23.4%	26.9%	11.4%	28.6%	19.0%	41.7%
National/State/City Travel Office	8.3%	21.3%	3.1%	5.4%	6.0%	12.4%	19.6%	6.8%	5.4%	3.3%	6.7%
Online Travel Agency	28.7%	29.4%	33.2%	28.3%	33.6%	28.3%	15.1%	17.3%	20.6%	30.2%	15.3%
Personal Recommendation	21.0%	17.5%	17.9%	18.6%	22.1%	17.8%	23.4%	9.5%	18.8%	17.2%	21.2%
Tour Operator/Travel Club	5.1%	2.0%	6.4%	3.2%	10.0%	4.2%	6.9%	5.6%	1.5%	1.3%	8.5%
Travel Agency Office	22.2%	13.0%	13.5%	25.3%	12.3%	15.9%	18.0%	42.7%	13.4%	23.5%	24.5%
Travel Guide	8.1%	6.7%	5.8%	8.2%	12.9%	9.4%	4.0%	10.5%	5.1%	1.9%	6.2%
Other	3.7%	2.9%	4.5%	5.3%	2.9%	3.3%	3.5%	4.9%	3.7%	5.3%	5.4%

** Multiple Response.



ADVANCE TRIP DECISION OVERSEAS VISITORS TO TEXAS/U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



ADVANCE TRIP DECISION OVERSEAS VISITORS TO TEXAS 2014

- The average time period for overseas visitors to decide to travel to Texas was 77 days, up from 73 days in 2013. By comparison, in 2014 the average overseas visitor to the U.S. decided to travel 20 days earlier (97 days). For the most part this is due to a higher percent of business travelers going to Texas compared to the U.S. on average.
- Travelers from Australia (the more leisure-oriented visitors) had the longest planning time frame with an average of 140 days, up significantly from 124 days in 2013, 127 days in 2012, and from 139 days in 2011). Travelers from the Netherlands made their decision to travel 102 days before their visit.
- In contrast, travelers from Taiwan (37 days), India (44 days), China (51 days), and Colombia (51 days) decided to visit in a much shorter time line than most of the other markets.
- British visitors decided to travel 91 days prior to departing, however British leisure visitors decided to travel three weeks sooner (114 days).

Texas Overseas Visitors 2014 Report

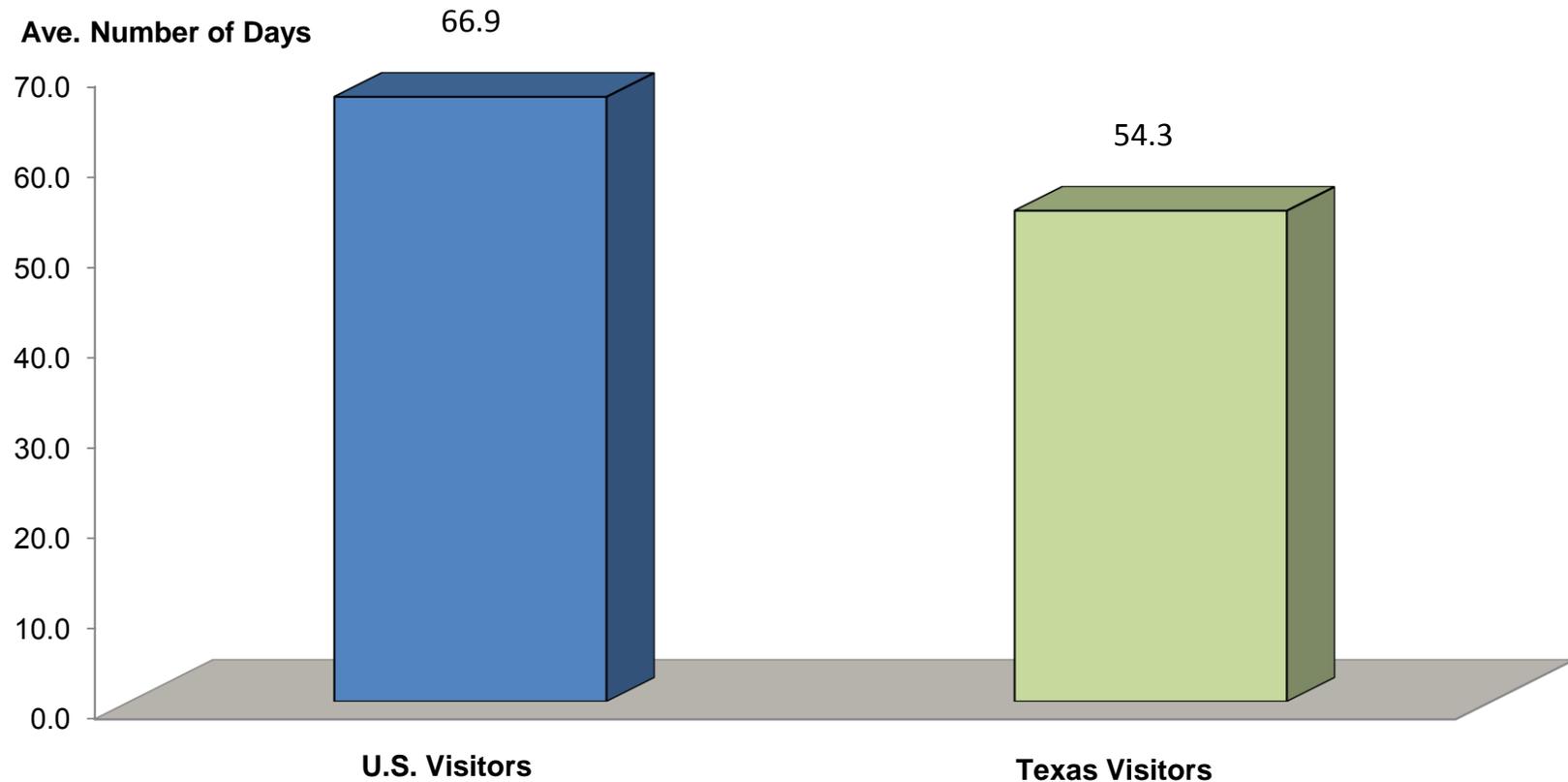


Table: Advance Trip Decision

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How many days prior to departure did you make the decision to travel? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,061	510	339	181	202	232	340	117	68*	399	206
Same Day	0.1%	-	-	-	-	-	-	-	-	-	-
1 - 3 Days	3.5%	5.9%	2.4%	2.4%	3.7%	4.1%	2.8%	4.3%	9.7%	4.6%	1.0%
4 - 7 Days	7.0%	5.3%	5.2%	2.3%	4.5%	9.8%	7.9%	7.4%	9.9%	11.1%	2.0%
8 - 14 Days	9.2%	11.2%	10.1%	6.2%	13.0%	6.2%	12.6%	12.2%	7.3%	8.7%	4.7%
15 - 30 Days	25.1%	14.4%	17.1%	21.2%	14.0%	28.5%	27.3%	30.1%	31.9%	39.3%	12.3%
31 - 60 Days	18.2%	16.7%	17.3%	20.8%	12.6%	16.5%	21.4%	24.8%	4.9%	17.8%	11.8%
61 - 90 Days	12.6%	14.9%	13.3%	20.1%	11.5%	14.6%	16.1%	11.3%	22.6%	8.7%	14.3%
91 - 120 Days	7.4%	8.1%	8.1%	11.2%	18.6%	8.6%	4.1%	4.0%	6.4%	4.3%	14.5%
121 - 180 Days	8.1%	10.1%	12.3%	6.9%	7.8%	6.8%	4.6%	3.5%	7.0%	4.3%	15.0%
181 or More Days	8.7%	13.3%	14.1%	9.0%	14.4%	4.8%	3.3%	2.5%	0.4%	1.1%	24.4%
Mean No. of Days	77.1	91.4	99.2	89.1	101.9	65.7	57.1	51.4	53.1	43.6	139.9
Median No. of Days	48.0	60.0	60.0	60.0	90.0	40.0	30.0	30.0	30.0	30.0	100.0
								2014	2014	2014	
	12-14	12-14	12-14	12-14	12-14	12-14	2014	Overseas	Overseas	Overseas	13-14
	Italy	Taiwan	Colombia	Nordic	C America	M East	Overseas	Biz/CV	POE	POE	UK
	to TX	to TX	to TX	to TX	to TX	to TX	Leis. TX	TX	Dallas	Houston	Leis. TX
How many days prior to departure did you make the decision to travel? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	120	105	102	263	293	266	1,156	977	658	1201	342
Same Day	-	-	-	-	-	0.4%	-	-	-	0.5%	-
1 - 3 Days	3.7%	5.3%	2.9%	4.3%	5.3%	5.8%	2.7%	5.3%	2.1%	4.5%	2.9%
4 - 7 Days	5.3%	4.9%	2.6%	8.6%	5.9%	8.6%	3.5%	13.4%	3.0%	7.3%	1.5%
8 - 14 Days	5.6%	22.3%	8.8%	13.1%	8.9%	11.6%	5.2%	14.8%	5.7%	10.7%	8.4%
15 - 30 Days	41.2%	38.3%	47.9%	14.5%	37.3%	35.5%	19.8%	33.6%	24.7%	26.0%	10.1%
31 - 60 Days	15.3%	14.1%	17.0%	17.7%	23.8%	19.3%	19.8%	17.8%	19.0%	21.0%	17.5%
61 - 90 Days	9.0%	10.8%	8.3%	11.5%	7.1%	9.4%	14.5%	7.5%	13.1%	12.3%	17.7%
91 - 120 Days	1.1%	2.0%	3.5%	10.5%	7.6%	2.1%	10.1%	3.0%	9.8%	6.4%	10.3%
121 - 180 Days	12.5%	1.6%	5.6%	8.0%	2.6%	4.0%	11.9%	2.5%	10.4%	6.3%	13.8%
181 or More Days	6.3%	0.7%	3.3%	11.8%	1.5%	3.2%	12.5%	2.1%	12.1%	5.0%	17.7%
Mean No. of Days	66.8	37.3	51.1	83.3	47.6	51.4	98.9	41.6	95.0	63.3	113.7
Median No. of Days	30.0	30.0	30.0	60.0	30.0	30.0	60.0	30.0	60.0	40.0	90.0



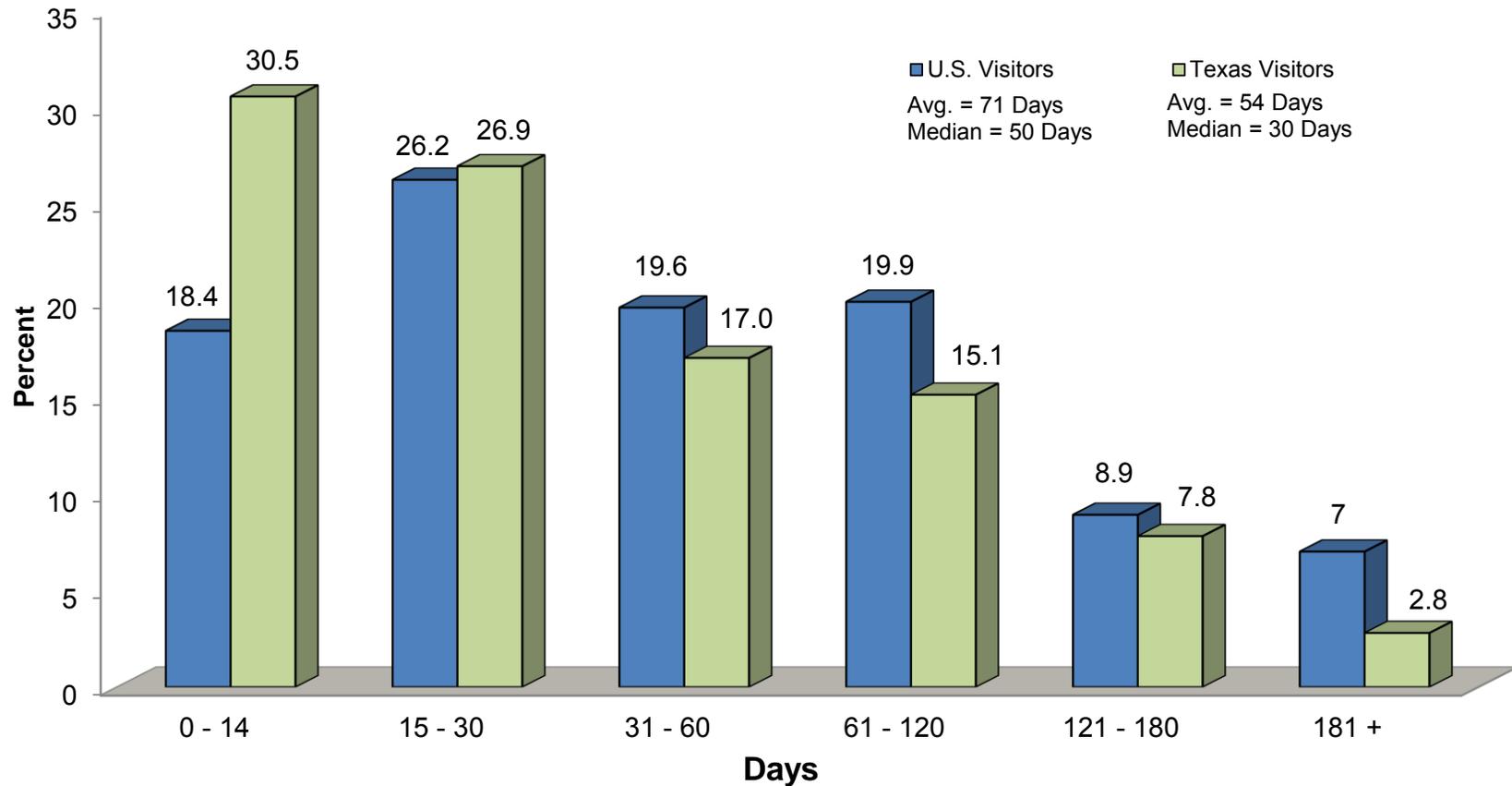
ADVANCE TIME FOR PURCHASE OF AIRLINE TICKETS OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



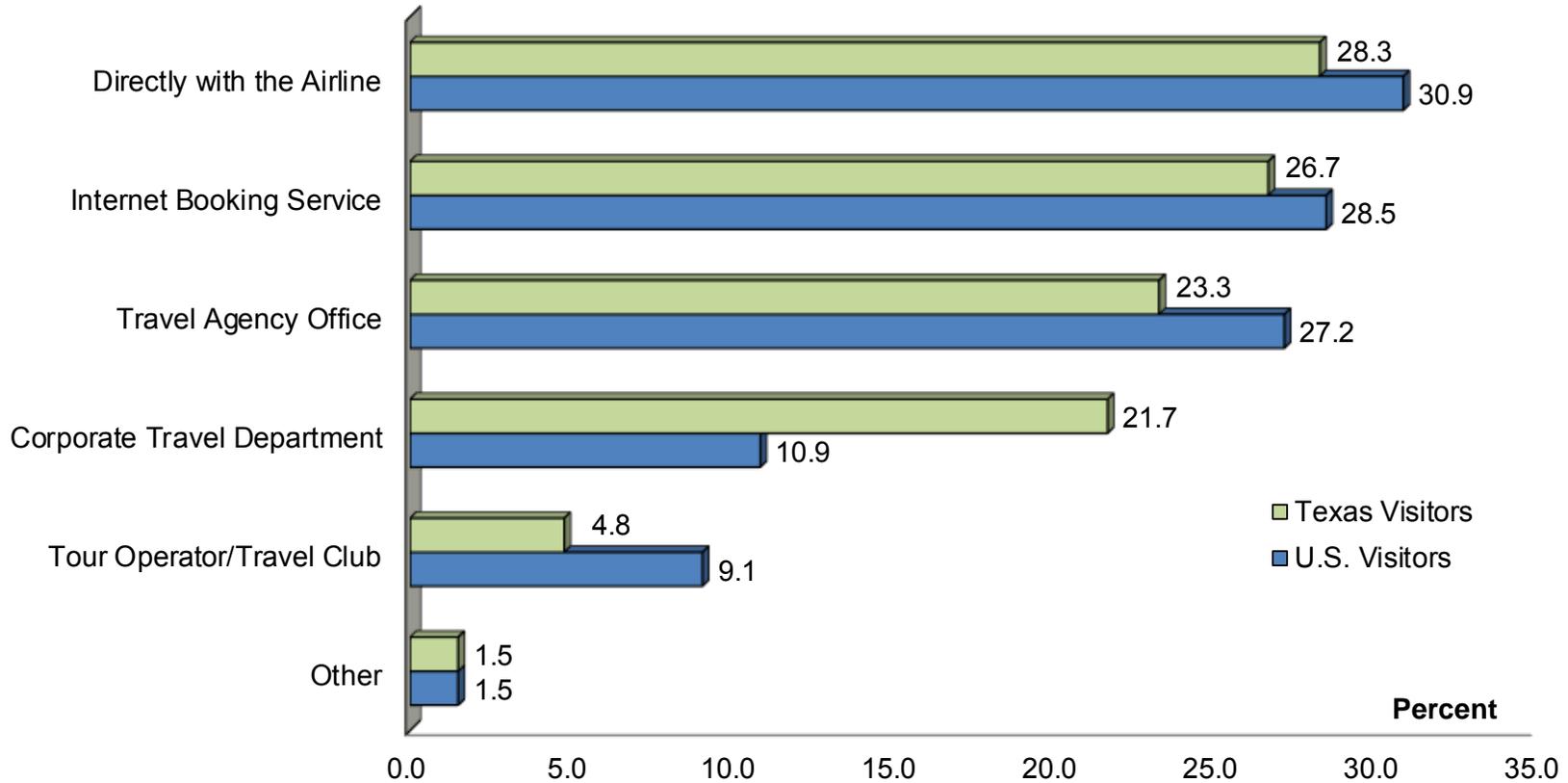
ADVANCE AIRLINE DECISION OVERSEAS VISITORS TO TEXAS/U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



HOW AIRLINE RESERVATIONS WERE MADE* OVERSEAS VISITORS TO TEXAS / U.S. 2014

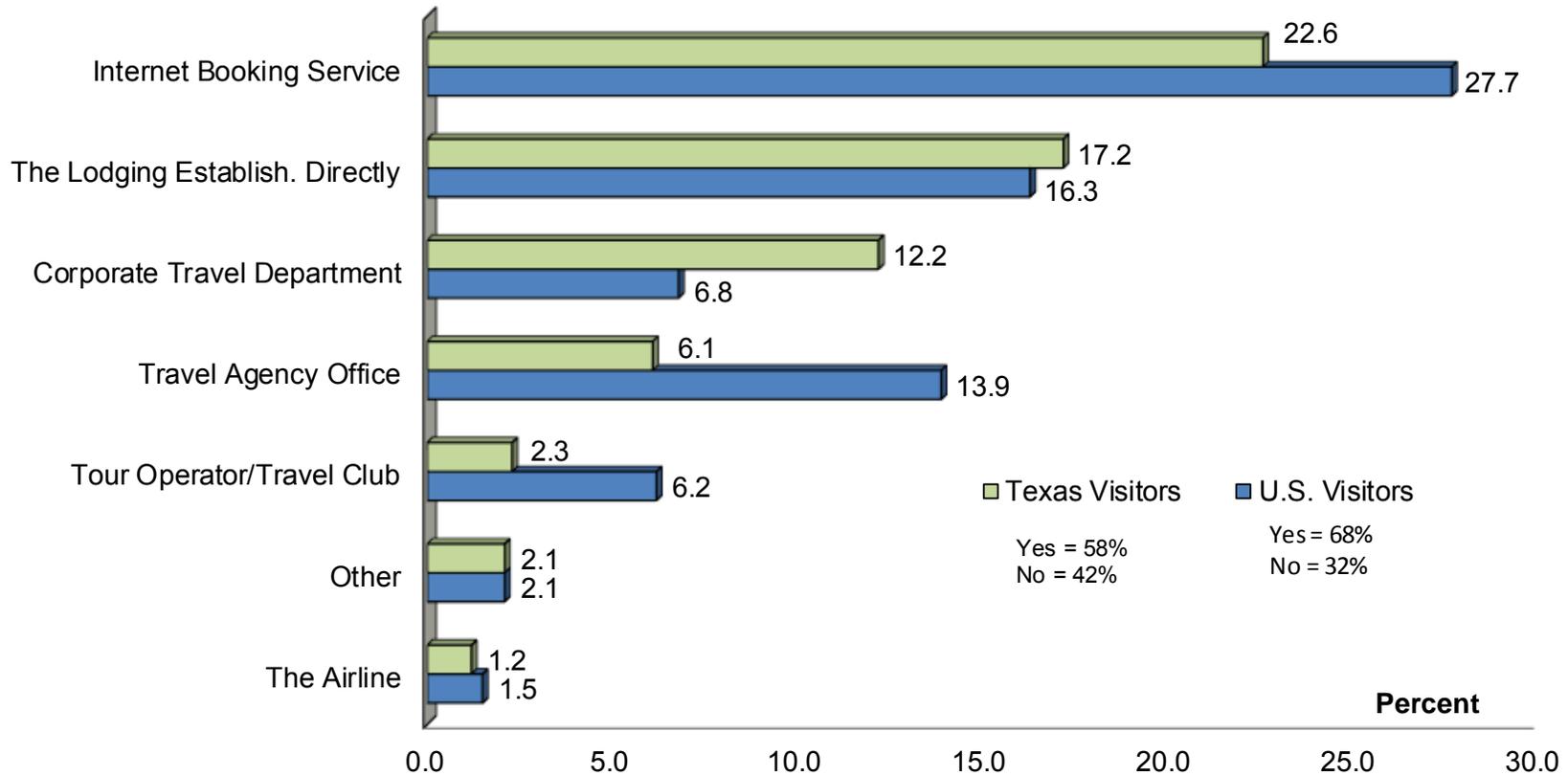


Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014
* = multiple response



WERE LODGING RESERVATIONS MADE BEFORE LEAVING HOME, IF SO HOW?*

OVERSEAS VISITORS TO TEXAS / U.S.
2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014

* = multiple response



ADVANCE AIRLINE RESERVATION OVERSEAS VISITORS TO TEXAS 2014

- On average, visitors to Texas committed to an airline ticket purchase 53 days prior to the actual trip (up from 52 days prior to the actual trip last year). Flight purchases are likely to occur further out as leisure travel continues to grow.
- Similar to the decision time line, it may be useful to establish a country-specific advance ticket time line to compare to public relations with your airline partners. Additionally, given the strong business focus there is a window of opportunity between the trip decision and booking the air travel to encourage a longer stay, to bring a spouse, companion, or make it a family trip combined with business travel.
- Not surprising, the Australians booked their flight much further in advance (87 days) compared to the other key visitor markets.

Texas Overseas Visitors 2014 Report



Table: Advance Airline Reservation

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How many days prior to departure did you make air travel reservations? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
Number of Respondents	1,992	493	331	177	201	227	333	116	65*	373	204
Same Day	0.6%	1.9%	0.1%	-	0.1%	-	0.6%	-	-	1.3%	0.3%
1 - 3 Days	5.8%	7.3%	3.4%	3.5%	6.4%	8.4%	6.0%	5.0%	11.0%	9.8%	4.3%
4 - 7 Days	10.6%	5.7%	6.5%	3.4%	4.1%	9.9%	15.3%	16.8%	11.3%	13.5%	4.5%
8 - 14 Days	12.1%	12.0%	12.3%	7.8%	14.4%	6.8%	15.6%	14.0%	21.7%	15.3%	5.1%
15 - 30 Days	28.2%	17.3%	23.4%	31.1%	19.9%	39.2%	26.4%	32.4%	21.6%	35.2%	18.9%
31 - 60 Days	17.9%	20.0%	17.9%	20.5%	14.2%	14.5%	15.3%	21.2%	12.1%	12.2%	16.2%
61 - 90 Days	8.5%	12.8%	9.8%	13.0%	15.7%	11.0%	15.0%	4.2%	12.4%	6.7%	15.9%
91 - 120 Days	6.0%	6.2%	7.5%	10.8%	15.6%	3.2%	2.8%	3.4%	5.4%	2.3%	11.9%
121 - 180 Days	6.1%	6.7%	12.5%	7.0%	5.9%	5.0%	1.4%	1.0%	4.5%	3.4%	13.3%
181 or More Days	4.2%	10.1%	6.6%	2.8%	3.9%	2.1%	1.7%	2.0%	-	0.2%	9.5%
Mean No. of Days	53.3	70.3	70.9	64.2	66.7	44.9	41.3	38.4	39.6	31.4	87.2
Median No. of Days	30.0	48.0	45.0	40.0	60.0	30.0	30.0	20.0	20.0	20.0	70.0
	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How many days prior to departure did you make air travel reservations? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
Number of Respondents	118	102	100	256	281	247	1,123	952	636	1159	332
Same Day	1.0%	-	-	0.2%	-	0.5%	0.5%	0.6%	0.3%	0.9%	2.4%
1 - 3 Days	4.7%	8.5%	5.4%	7.9%	10.6%	9.5%	4.0%	7.8%	2.6%	7.7%	4.0%
4 - 7 Days	13.2%	17.5%	4.3%	8.5%	6.1%	13.9%	5.4%	19.5%	6.3%	12.5%	2.5%
8 - 14 Days	12.8%	16.7%	17.5%	18.8%	13.8%	16.4%	8.3%	18.4%	11.7%	9.7%	7.7%
15 - 30 Days	33.4%	37.9%	50.4%	20.1%	37.5%	36.8%	26.0%	31.4%	30.8%	29.1%	13.7%
31 - 60 Days	13.8%	9.1%	6.1%	18.2%	16.2%	13.1%	19.9%	14.7%	18.0%	21.4%	23.3%
61 - 90 Days	7.0%	8.2%	10.6%	9.7%	12.4%	6.0%	11.7%	3.9%	8.5%	6.9%	15.6%
91 - 120 Days	0.6%	1.0%	3.5%	7.5%	1.7%	0.8%	8.9%	1.9%	8.8%	5.8%	7.9%
121 - 180 Days	10.3%	0.9%	0.5%	7.2%	1.6%	2.3%	8.9%	1.6%	7.3%	4.0%	9.2%
181 or More Days	3.1%	-	1.6%	1.9%	0.2%	0.8%	6.3%	0.2%	5.8%	1.9%	13.6%
Mean No. of Days	47.5	27.0	35.9	50.9	35.2	30.8	69.5	27.0	64.2	44.7	88.1
Median No. of Days	29.0	15.0	30.0	30.0	25.0	20.0	45.0	15.0	30.0	30.0	60.0



MEANS OF BOOKING AIR TRIP AND LODGING OVERSEAS VISITORS TO TEXAS 2014

- In 2014 a slight majority (58%) of travelers indicated they booked their hotel room prior to departing. By comparison, over two thirds (68%) of the overseas visitors to the U.S. indicated they pre-booked their lodging before departure. The gap is likely tied to strong repeat visitors for Texas.
- In 2014 the top means for booking lodging was through an internet booking service. However, only 23% of the overseas visitors to Texas booked their room this way, up from 21% in 2013. By comparison, one quarter (28%) of the overseas visitors to the U.S. booked their hotel through an internet booking service.
- Given the strong repeat visitor portion for Texas, it is not surprising that the second most common means of booking lodging was directly with the lodging establishment (17% of those that pre-booked).
- The biggest gap for Texas was booking through a travel agency. Only 6% of the overseas visitors to Texas booked lodging this way. By comparison, over twice as many (14%) of overseas visitors to the U.S. in 2014 booked lodging through a travel agency.
- By country, the Australians, Chinese, and Dutch were most likely to pre-book their lodging prior to visiting. In contrast, travelers from Italy and Colombia were least likely – a reflection of the strong repeat travelers from these countries.
- Booking air travel directly with the air carrier was the top means for booking a flight 28%, followed closely by internet booking service (27%) and travel agency office (23%). Dutch travelers had the highest tendency to book directly with an airline. In contrast, travelers from Taiwan, China, and India were least likely to book their flight direct with an airline.

Texas Overseas Visitors 2014 Report



Table: Means of Booking Air Trip and Advance Flight Purchase

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How were airline reservations made for this trip?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,151	527	356	182	211	243	346	121	67*	417	212
Directly with the Airline	28.3%	31.7%	26.1%	30.2%	34.6%	32.0%	22.4%	18.1%	20.3%	14.2%	22.1%
Corporate Travel Department	21.7%	23.1%	20.6%	18.1%	23.1%	24.9%	24.4%	35.0%	25.8%	44.1%	10.8%
Internet Booking Service	26.7%	28.4%	27.4%	30.4%	27.0%	15.6%	14.9%	30.3%	24.3%	13.4%	23.0%
Tour Operator/Travel Club	4.8%	5.9%	1.7%	6.5%	4.7%	9.6%	5.7%	2.9%	2.9%	3.3%	5.5%
Travel Agency Office	23.3%	13.1%	27.1%	11.9%	12.1%	25.5%	39.3%	16.7%	28.3%	29.6%	44.1%
Other	1.5%	0.5%	0.9%	3.5%	0.9%	0.7%	0.5%	1.6%	0.4%	1.9%	0.4%

* Denotes small sample.

** Multiple Response.

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How far in advance was payment made for your international air tickets? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,866	476	312	165	191	210	296	107	60*	336	210
Same Day	0.5%	0.5%	0.2%	0.5%	0.3%	-	0.4%	-	-	0.3%	-
1 - 3 Days	6.7%	6.7%	3.7%	3.3%	5.0%	7.9%	14.7%	8.5%	9.1%	11.5%	5.0%
4 - 7 Days	10.5%	5.7%	8.3%	2.3%	6.5%	7.0%	19.5%	13.7%	26.9%	16.0%	2.2%
8 - 14 Days	12.8%	12.5%	11.5%	9.2%	14.5%	15.8%	11.2%	16.1%	7.0%	17.7%	8.8%
15 - 30 Days	26.9%	15.8%	22.1%	36.6%	16.7%	34.6%	22.6%	35.7%	22.4%	25.9%	16.2%
31 - 60 Days	17.0%	19.7%	19.0%	16.1%	18.6%	13.4%	15.2%	17.5%	17.9%	14.3%	15.4%
61 - 90 Days	10.9%	18.5%	14.9%	16.5%	11.7%	9.3%	12.3%	6.2%	7.6%	8.1%	22.5%
91 - 120 Days	4.2%	8.3%	5.7%	6.7%	12.9%	3.9%	0.5%	0.7%	-	2.6%	6.9%
121 - 180 Days	7.8%	7.4%	8.7%	5.8%	9.3%	5.9%	2.9%	1.7%	9.1%	3.3%	14.3%
181 or More Days	2.8%	4.9%	6.0%	3.1%	4.5%	2.3%	0.7%	-	-	0.4%	8.9%
Mean No. of Days	54.3	68.6	69.7	62.1	71.1	46.7	36.7	32.4	41.1	33.8	90.6
Median No. of Days	30.0	60.0	42.0	30.0	60.0	30.0	21.0	30.0	20.0	20.0	84.0

* Denotes small sample.

Texas Overseas Visitors 2014 Report



Table: Means of Booking Air Trip and Advance Flight Purchase (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How were airline reservations made for this trip? (**) (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	123	110	107	266	308	280	1,204	1,009	677	1265	354
Directly with the Airline	28.2%	6.3%	29.8%	32.5%	41.9%	24.8%	34.8%	16.8%	30.1%	26.8%	38.6%
Corporate Travel Department	14.2%	32.9%	11.2%	24.5%	4.6%	25.7%	6.0%	48.4%	15.2%	23.9%	4.9%
Internet Booking Service	25.1%	6.7%	35.6%	29.9%	29.9%	25.5%	36.6%	12.7%	24.3%	24.6%	36.2%
Tour Operator/Travel Club	8.3%	5.6%	2.4%	1.9%	2.9%	6.1%	5.6%	3.2%	5.9%	5.7%	7.9%
Travel Agency Office	30.5%	53.6%	22.7%	14.8%	25.0%	32.7%	23.0%	23.4%	28.7%	24.7%	15.2%
Other	4.5%	-	-	1.4%	0.3%	2.1%	1.7%	1.2%	1.5%	1.6%	0.5%

** Multiple Response.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How far in advance was payment made for your international air tickets? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	103	98	95*	234	266	219	1,098	840	597	1057	335
Same Day	-	7.8%	-	1.3%	-	1.8%	0.4%	0.7%	0.4%	0.4%	0.7%
1 - 3 Days	6.3%	16.3%	10.2%	7.3%	9.6%	10.4%	4.4%	10.4%	3.3%	8.2%	2.9%
4 - 7 Days	10.9%	15.1%	10.0%	10.9%	11.1%	9.6%	6.1%	18.2%	7.3%	12.3%	3.7%
8 - 14 Days	17.0%	25.6%	9.8%	15.7%	15.4%	19.8%	9.5%	19.7%	12.7%	8.9%	8.2%
15 - 30 Days	35.1%	21.6%	44.3%	17.2%	31.9%	26.2%	24.0%	31.5%	28.1%	32.5%	13.2%
31 - 60 Days	11.5%	8.5%	7.9%	20.5%	16.1%	16.2%	20.4%	11.1%	19.0%	18.2%	23.2%
61 - 90 Days	5.7%	2.8%	9.2%	14.8%	11.9%	5.8%	14.8%	4.3%	10.8%	7.8%	22.2%
91 - 120 Days	3.0%	1.0%	4.1%	3.4%	1.1%	1.8%	5.8%	1.7%	5.8%	4.1%	10.4%
121 - 180 Days	9.3%	1.3%	1.5%	7.9%	2.3%	6.4%	11.0%	1.6%	8.7%	5.7%	9.6%
181 or More Days	1.2%	-	3.0%	1.1%	0.5%	2.0%	3.7%	0.9%	4.1%	1.9%	5.9%
Mean No. of Days	44.9	21.1	41.8	52.3	37.5	42.3	67.9	29.3	63.0	46.7	81.0
Median No. of Days	25.0	14.0	30.0	30.0	30.0	21.0	60.0	15.0	30.0	30.0	60.0

* Denotes small sample.

Texas Overseas Visitors 2014 Report



Table: Pre-Booked Lodging

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Before you left home, did you make reservations for lodging, if so, how?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,045	516	330	177	212	236	334	114	66*	380	207
Yes, Booked through***	58.2%	52.5%	55.8%	52.6%	62.6%	55.9%	76.3%	64.6%	51.9%	53.1%	76.2%
The Lodging Establish. Directly	17.2%	18.7%	18.7%	14.4%	25.8%	17.4%	12.8%	25.0%	5.3%	14.0%	24.9%
Corporate Travel Department	12.2%	14.7%	11.4%	10.8%	13.1%	13.4%	16.2%	12.5%	11.2%	28.3%	3.5%
Internet Booking Service	22.6%	14.5%	20.9%	27.7%	29.9%	21.1%	24.9%	28.9%	21.4%	9.4%	33.3%
The Airline	1.2%	0.8%	0.1%	-	0.1%	1.5%	1.4%	-	-	0.6%	1.0%
Tour Operator/Travel Club	2.3%	5.6%	2.6%	2.2%	0.9%	0.9%	4.4%	1.3%	-	1.8%	4.8%
Travel Agency Office	6.1%	2.4%	7.9%	0.5%	2.3%	5.8%	17.4%	2.1%	16.5%	3.5%	21.6%
Other	2.1%	1.6%	3.1%	0.9%	4.1%	1.2%	4.5%	0.5%	0.6%	3.2%	3.5%
No	41.8%	47.5%	44.2%	47.4%	37.4%	44.1%	23.7%	35.4%	48.1%	46.9%	23.8%

* Denotes small sample.

** Percentages based on total number of respondents.

*** Multiple Response.

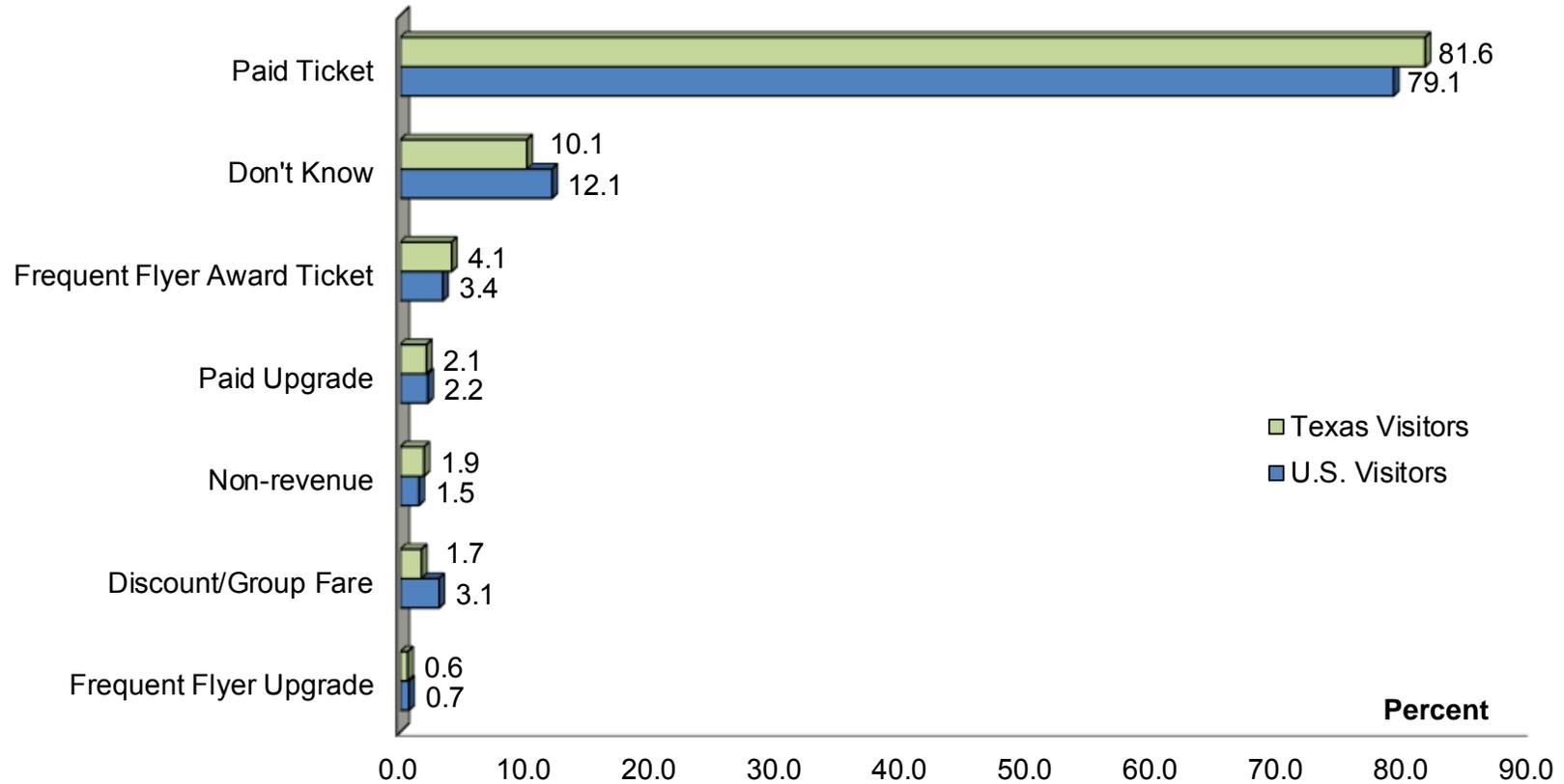
	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Before you left home, did you make reservations for lodging, if so, how?*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	113	105	102	248	282	258	1,148	977	649	1194	348
Yes, Booked through***	48.6%	59.1%	39.6%	54.5%	39.6%	62.3%	51.3%	70.3%	63.0%	54.5%	44.5%
The Lodging Establish. Directly	18.8%	17.0%	14.4%	14.8%	19.2%	11.8%	16.6%	18.8%	18.0%	14.8%	17.3%
Corporate Travel Department	4.4%	18.3%	7.8%	19.4%	1.7%	17.4%	3.0%	27.6%	11.5%	12.9%	2.3%
Internet Booking Service	16.6%	10.5%	13.6%	21.4%	23.0%	28.2%	26.9%	16.6%	20.7%	19.4%	19.4%
The Airline	-	2.1%	0.5%	0.1%	0.1%	0.9%	0.5%	2.3%	1.4%	0.6%	0.7%
Tour Operator/Travel Club	1.4%	5.2%	2.5%	0.1%	0.6%	2.1%	2.9%	1.6%	6.9%	1.4%	7.7%
Travel Agency Office	6.6%	8.3%	2.0%	4.0%	1.3%	5.5%	6.5%	5.3%	11.9%	6.0%	3.2%
Other	0.8%	1.1%	0.8%	1.1%	1.3%	1.8%	2.2%	1.8%	2.0%	2.9%	2.3%
No	51.4%	40.9%	60.4%	45.5%	60.4%	37.7%	48.7%	29.7%	37.0%	45.5%	55.5%

** Percentages based on total number of respondents.

*** Multiple Response.



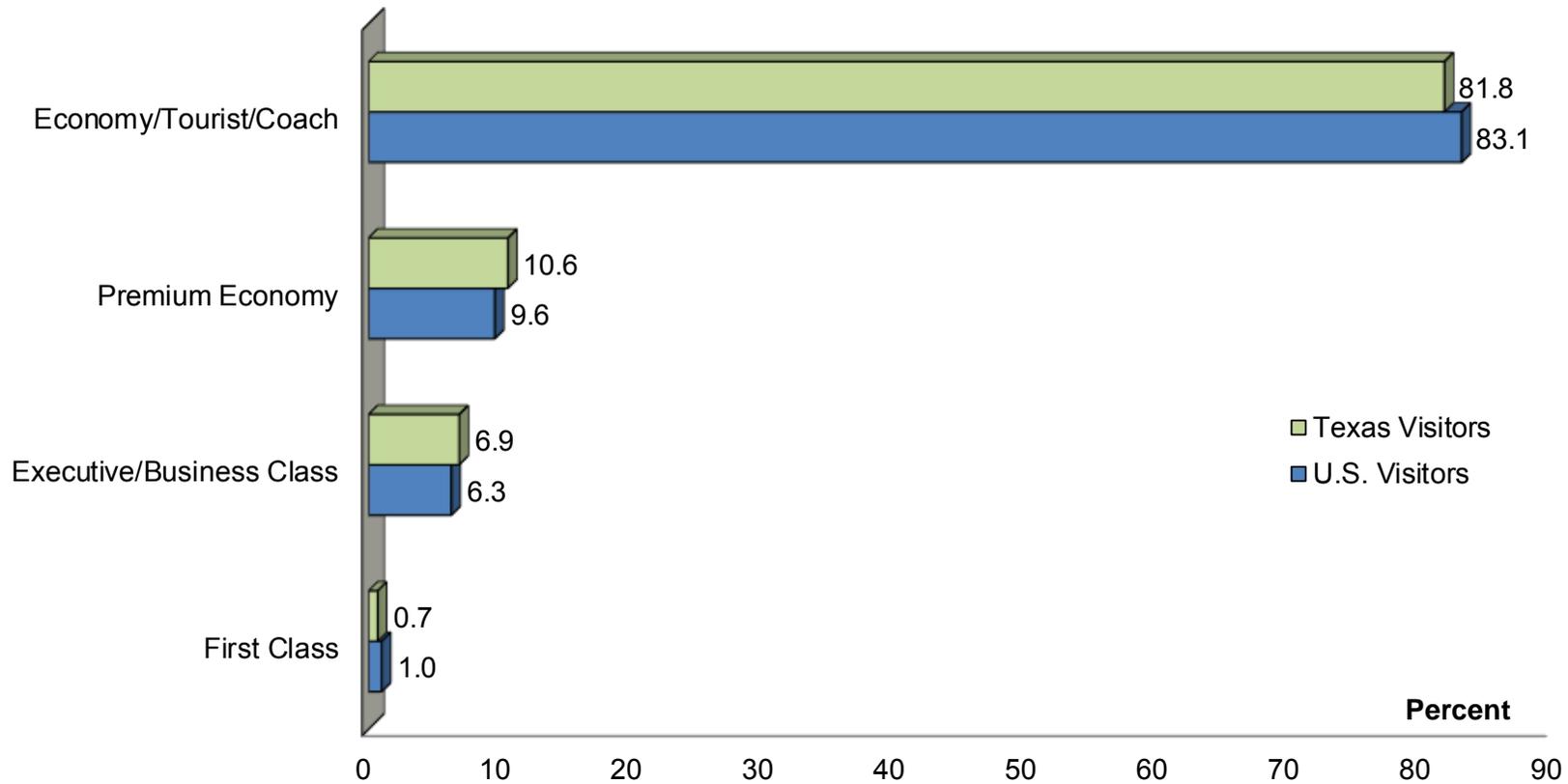
TYPE OF AIRLINE TICKET*
OVERSEAS VISITORS TO TEXAS / U.S.
2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014
* = multiple response



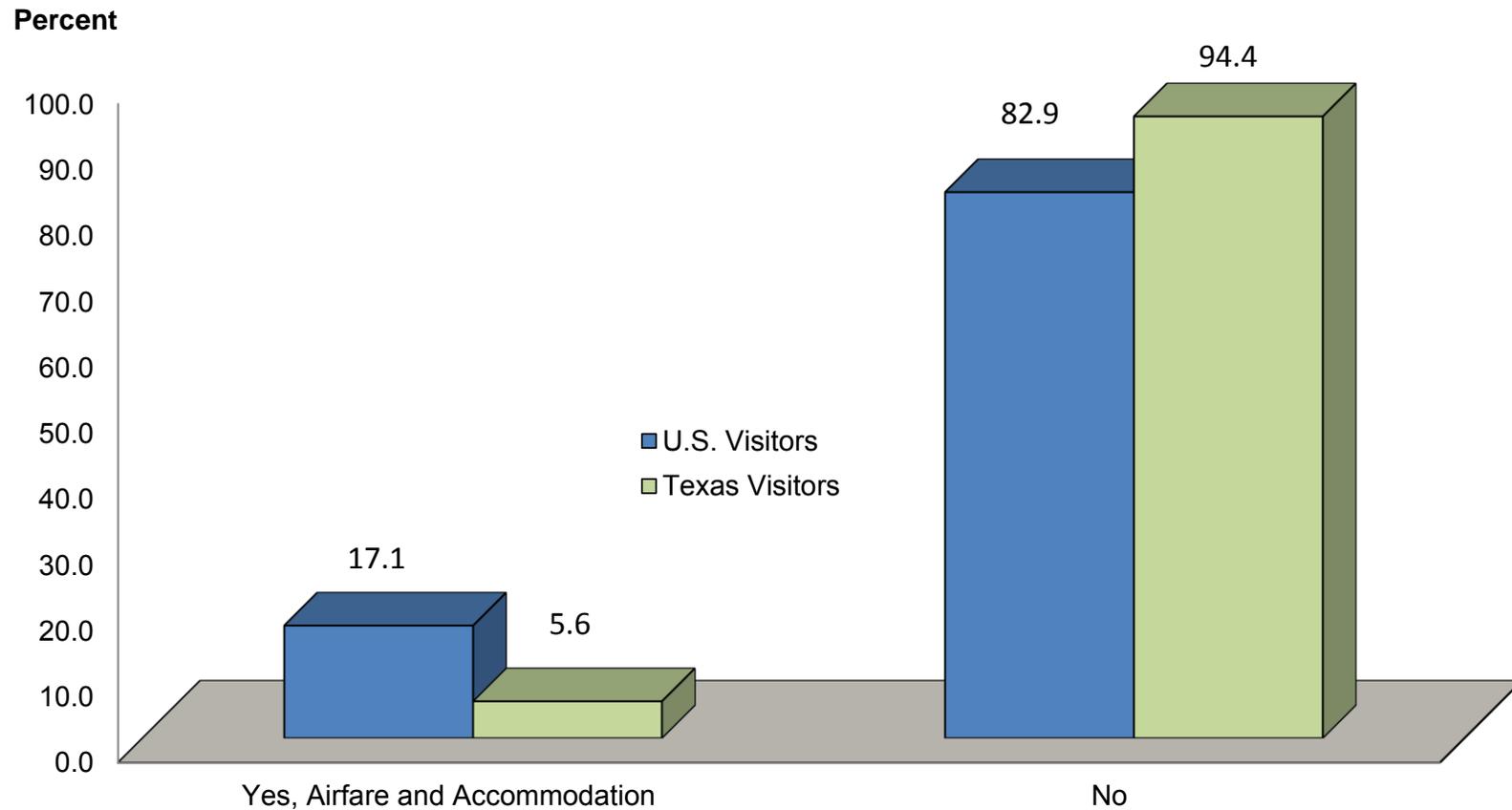
AIRCRAFT SEATING OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



PREPAID, INCLUSIVE TOUR PACKAGE OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014

Texas Overseas Visitors 2014 Report



AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE OVERSEAS VISITORS TO TEXAS 2014

- Airline seating type was dominated by economy/tourist/coach.
- The majority of travelers used a paid ticket, with India ranking the highest.
- Few traveled on a pre-paid inclusive tour package. It should be noted that this question set may greatly underestimate package travel. Taiwan had the highest propensity to travel on a pre-paid trip package.

Table: Airline Seating

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Where are you sitting in the aircraft today? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,958	488	333	171	195	223	336	113	65*	379	201
First Class	0.7%	0.3%	0.4%	1.3%	0.2%	2.2%	2.2%	-	-	-	-
Executive/Business Class	6.9%	4.8%	13.2%	5.1%	8.1%	9.0%	37.6%	5.9%	9.8%	2.7%	5.6%
Premium Economy	10.6%	21.0%	5.1%	6.4%	14.7%	10.6%	15.5%	5.0%	3.4%	7.6%	8.2%
Economy/Tourist/Coach	81.8%	73.9%	81.3%	87.1%	77.0%	78.1%	44.7%	89.1%	86.8%	89.7%	86.2%

* Denotes small sample.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Where are you sitting in the aircraft today? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	116	101	90*	252	274	254	1,094	935	623	1136	329
First Class	-	-	-	0.3%	7.4%	0.2%	0.6%	0.7%	1.2%	1.5%	-
Executive/Business Class	7.3%	32.1%	2.8%	2.7%	5.3%	4.2%	3.5%	12.4%	5.3%	6.6%	3.0%
Premium Economy	11.8%	10.9%	16.2%	12.4%	13.4%	13.8%	10.2%	12.7%	8.2%	9.9%	17.9%
Economy/Tourist/Coach	80.8%	56.9%	81.1%	84.6%	73.9%	81.7%	85.7%	74.2%	85.3%	82.0%	79.1%

* Denotes small sample.

Texas Overseas Visitors 2014 Report



Table: Airline Ticket Type and Prepaid Package

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What type of airline ticket do you have?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,927	481	327	165	196	225	335	110	66*	369	200
Paid Ticket	81.6%	87.3%	84.4%	75.9%	83.1%	73.0%	64.4%	69.7%	73.2%	87.7%	86.1%
Paid Upgrade	2.1%	3.3%	1.8%	0.8%	5.9%	1.9%	15.7%	3.3%	1.3%	-	0.2%
Frequent Flyer Award Ticket	4.1%	2.4%	1.2%	6.5%	3.1%	6.7%	0.9%	-	8.0%	1.7%	6.3%
Frequent Flyer Upgrade	0.6%	0.9%	1.4%	0.5%	0.2%	-	4.1%	1.9%	1.2%	0.3%	0.8%
Discount/Group Fare	1.7%	0.4%	2.2%	1.0%	3.6%	1.1%	9.6%	2.2%	1.1%	1.4%	1.5%
Non-revenue	1.9%	1.2%	1.8%	-	0.9%	0.7%	0.3%	2.0%	-	0.6%	1.1%
Don't Know	10.1%	8.9%	9.8%	15.7%	6.5%	18.5%	10.0%	22.2%	15.2%	9.0%	5.5%

* Denotes small sample.

** Multiple Response.

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Is this trip part of a prepaid, inclusive tour package?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,091	517	345	178	212	238	341	117	68*	383	211
Yes, Airfare and Accommodation***	5.6%	6.1%	2.1%	9.8%	1.0%	6.1%	10.8%	16.9%	2.9%	9.2%	8.3%
Airfare and Accommodation Only	2.2%	1.5%	0.5%	5.6%	0.1%	3.0%	5.2%	9.0%	-	3.7%	0.6%
Attractions/Events/Entertainment	0.4%	0.8%	0.9%	-	-	1.0%	2.6%	2.0%	0.8%	1.9%	5.1%
Bus/Coach	1.2%	2.2%	0.4%	-	-	0.2%	3.4%	4.0%	0.8%	2.1%	5.7%
Cruise	0.5%	0.2%	0.2%	-	0.9%	-	0.4%	2.8%	-	-	1.2%
Guided Tours	0.9%	1.5%	0.2%	-	-	0.3%	3.3%	3.2%	2.0%	0.9%	4.1%
Meals	1.4%	0.6%	-	0.5%	-	2.1%	3.9%	4.2%	2.1%	4.6%	5.5%
Rail Tickets	0.2%	-	-	1.3%	-	-	1.1%	0.8%	-	-	1.3%
Recreation	0.3%	-	-	-	-	0.6%	-	1.0%	-	0.3%	0.2%
Rental Car	2.0%	2.7%	0.7%	3.6%	-	0.9%	0.5%	2.1%	0.8%	4.0%	0.4%
Tour Guide for Entire Trip	0.9%	1.7%	0.3%	-	-	0.6%	2.3%	3.3%	-	0.4%	1.6%
No	94.4%	93.9%	97.9%	90.2%	99.0%	93.9%	89.2%	83.1%	97.1%	90.8%	91.7%

* Denotes small sample.

** Percentages based on total number of respondents.

*** Multiple Response. Must include airfare and accommodation and may include others.

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Table: Airline Ticket Type and Prepaid Package (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What type of airline ticket do you have?*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	113	102	89*	250	268	249	1,077	921	611	1115	325
Paid Ticket	80.3%	86.0%	84.7%	81.4%	75.9%	84.3%	83.7%	79.8%	77.5%	78.2%	86.8%
Paid Upgrade	2.0%	4.1%	-	3.4%	1.9%	1.8%	1.7%	3.3%	2.0%	2.1%	3.9%
Frequent Flyer Award Ticket	2.7%	1.5%	2.3%	2.4%	5.1%	1.9%	4.0%	4.0%	3.4%	3.5%	2.9%
Frequent Flyer Upgrade	0.4%	0.9%	-	1.3%	2.1%	0.6%	0.6%	0.7%	0.6%	0.2%	1.2%
Discount/Group Fare	-	1.4%	1.9%	0.6%	2.2%	2.1%	1.5%	2.3%	2.6%	2.2%	-
Non-revenue	-	0.6%	1.5%	3.3%	5.4%	1.6%	2.4%	1.3%	0.9%	2.8%	1.1%
Don't Know	16.0%	7.1%	9.6%	10.4%	9.3%	9.3%	8.6%	10.6%	15.6%	12.7%	9.9%

* Denotes small sample.

** Multiple Response.

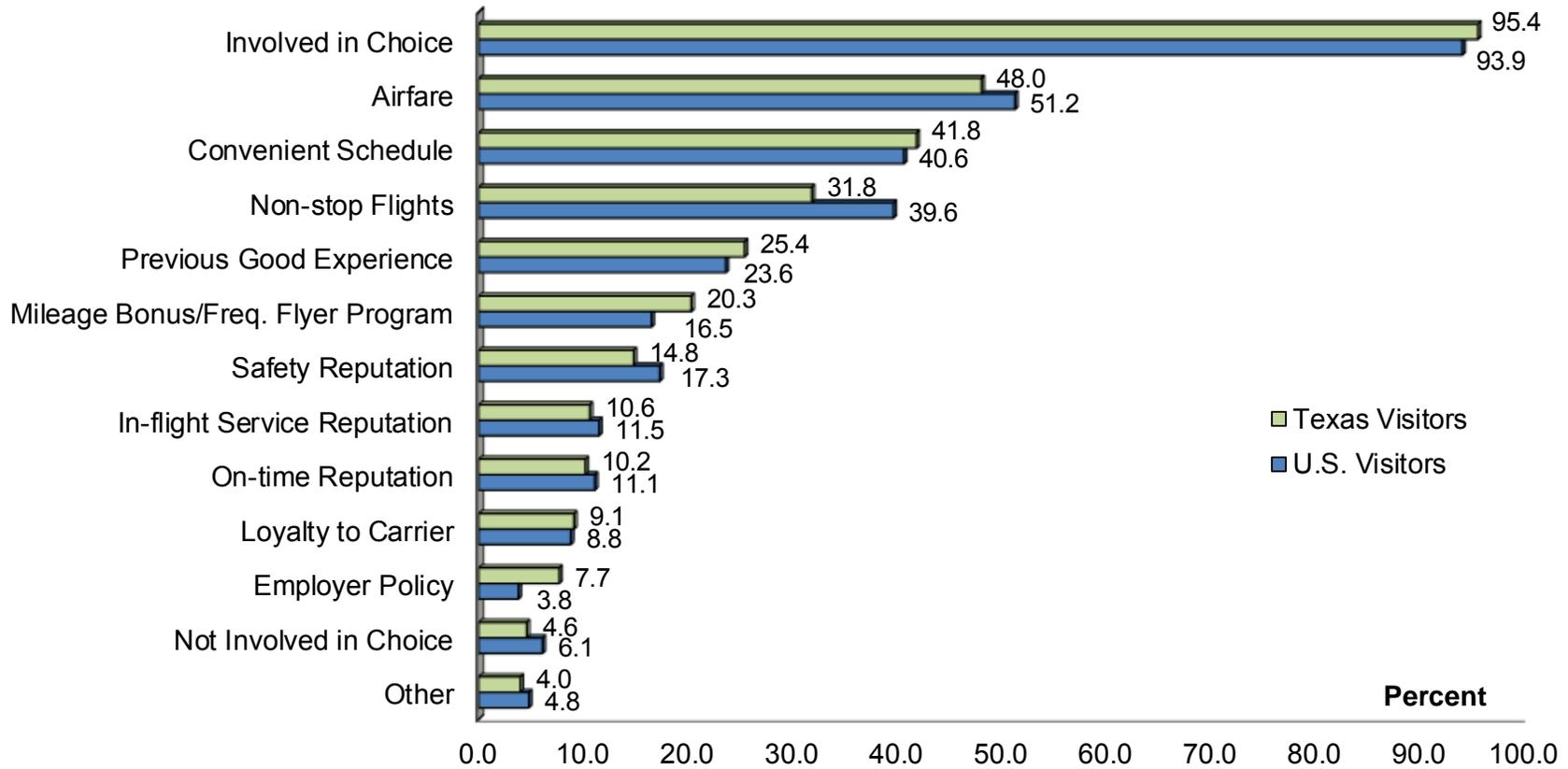
	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Is this trip part of a prepaid, inclusive tour package?*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	122	110	102	263	296	276	1,173	989	666	1212	350
Yes, Airfare and Accommodation***	2.1%	17.7%	0.7%	0.4%	0.1%	6.3%	4.3%	7.9%	9.9%	7.4%	6.7%
Airfare and Accommodation Only	-	4.9%	0.2%	-	-	2.6%	0.7%	4.2%	3.4%	3.6%	1.0%
Attractions/Events/Entertainment	-	7.1%	-	-	-	1.3%	0.5%	0.5%	2.6%	2.1%	1.1%
Bus/Coach	0.5%	-	-	-	0.1%	0.7%	1.6%	0.8%	3.4%	2.1%	2.6%
Cruise	-	-	-	-	-	-	0.8%	-	1.2%	-	0.3%
Guided Tours	-	-	-	-	-	-	1.3%	0.4%	2.3%	0.4%	2.2%
Meals	0.5%	9.8%	0.4%	-	0.1%	1.6%	1.0%	2.3%	2.7%	2.5%	0.5%
Rail Tickets	-	4.9%	-	-	-	-	0.3%	-	1.0%	1.2%	-
Recreation	-	-	-	-	-	-	0.2%	0.7%	0.3%	0.2%	-
Rental Car	1.1%	7.8%	-	0.4%	-	2.2%	2.2%	2.3%	2.5%	1.0%	3.9%
Tour Guide for Entire Trip	-	1.1%	-	-	-	-	1.2%	0.2%	2.0%	1.2%	2.4%
No	97.9%	82.3%	99.3%	99.6%	99.9%	93.7%	95.7%	92.1%	90.1%	92.6%	93.3%

** Percentages based on total number of respondents.

*** Multiple Response. Must include airfare and accommodation and may include others.



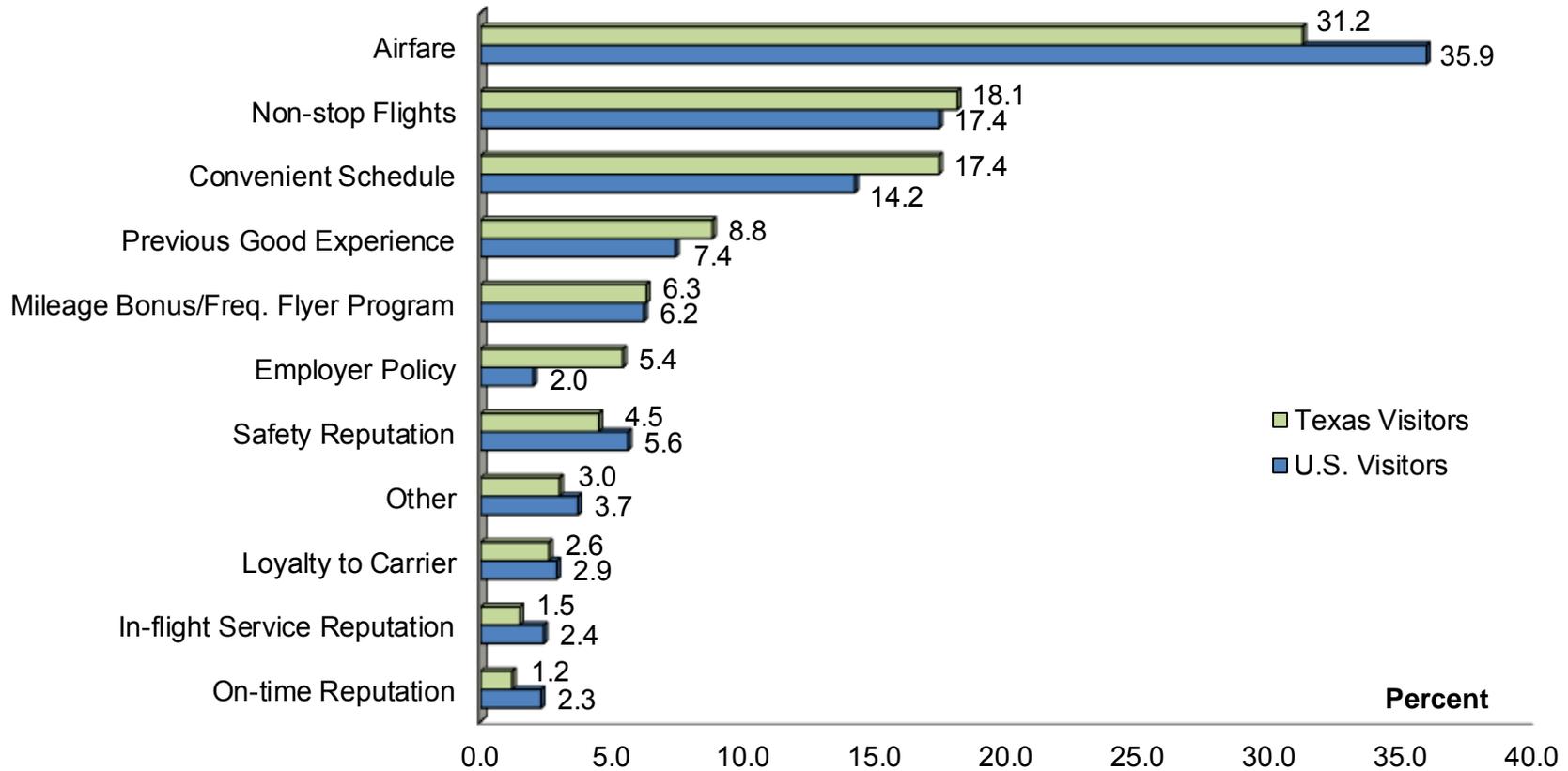
THREE MAIN REASONS FOR FLYING THIS AIRLINE* OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014
* = multiple response



MOST IMPORTANT REASON FOR FLYING THIS AIRLINE OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



AIRLINE CHOICE (TOP 3 REASONS AND MAIN REASON) OVERSEAS VISITORS TO TEXAS 2014

- Nearly all passengers (95%) indicated they were involved in choosing their airline. When given an option to choose the top three reasons as a multiple response, passengers listed airfare, convenient schedule, and non-stop flights (by rank).
- When asked to only choose the top reason – it was clear that price was the main reason for choosing.
- It is worth noting that Texas visitors when compared to the average U.S. visitor were more likely to be concerned with employer policies, mileage bonus/frequent flyer programs, and previous good experiences. This is likely due to a higher reliance on business travelers.

Texas Overseas Visitors 2014 Report



Table: Airline Choice - Top 3 Reasons and Main Reason

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What were your three main reasons for flying on this airline?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,833	481	313	165	188	205	317	114	64*	327	200
Not Involved in Choice	4.6%	5.1%	10.3%	4.0%	4.4%	8.6%	3.9%	3.4%	2.3%	4.4%	7.3%
Involved in Choice***	95.4%	94.9%	89.7%	96.0%	95.6%	91.4%	96.1%	96.6%	97.7%	95.6%	92.7%
Airfare	48.0%	47.9%	43.1%	45.5%	46.0%	40.1%	28.3%	53.5%	50.3%	46.3%	42.3%
Convenient Schedule	41.8%	48.9%	34.4%	38.5%	46.4%	38.4%	32.3%	48.9%	42.0%	43.1%	35.6%
Employer Policy	7.7%	6.2%	9.0%	10.6%	4.7%	3.0%	7.7%	7.2%	18.2%	12.5%	4.8%
In-flight Service Reputation	10.6%	7.5%	4.7%	6.3%	10.2%	4.2%	27.7%	15.5%	8.0%	15.6%	12.4%
Loyalty to Carrier	9.1%	10.4%	9.7%	19.5%	9.8%	10.7%	8.5%	4.5%	17.0%	7.2%	12.9%
Mileage Bonus/Freq. Flyer Program	20.3%	22.5%	20.7%	20.3%	13.6%	26.4%	49.9%	28.3%	53.4%	11.6%	18.7%
Non-stop Flights	31.8%	36.3%	33.0%	33.6%	57.6%	42.6%	28.4%	26.7%	23.9%	21.2%	36.0%
On-time Reputation	10.2%	7.1%	6.2%	9.5%	6.1%	9.1%	15.8%	7.3%	6.5%	15.6%	6.2%
Previous Good Experience	25.4%	29.5%	25.7%	17.5%	23.8%	18.9%	27.4%	15.5%	19.4%	27.8%	30.2%
Safety Reputation	14.8%	9.2%	25.2%	22.5%	10.4%	11.6%	17.7%	18.4%	8.0%	6.8%	27.0%
Other	4.0%	5.4%	4.8%	8.7%	6.3%	6.4%	3.4%	2.0%	-	4.1%	8.0%
What was the most important reason for flying on this airline? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,365	372	221	125	150	146	259	83*	52*	227	156
Airfare	31.2%	31.3%	32.1%	29.4%	35.1%	31.8%	10.1%	27.1%	35.4%	39.2%	27.2%
Convenient Schedule	17.4%	20.7%	13.9%	8.8%	12.4%	12.4%	15.6%	21.9%	6.5%	18.4%	21.0%
Employer Policy	5.4%	4.5%	8.3%	10.5%	2.1%	1.3%	3.6%	6.0%	7.3%	7.6%	2.4%
In-flight Service Reputation	1.5%	2.4%	0.6%	0.6%	0.3%	0.5%	5.5%	3.3%	1.3%	3.3%	0.5%
Loyalty to Carrier	2.6%	2.9%	2.4%	7.3%	0.3%	1.4%	1.0%	-	4.0%	3.6%	5.2%
Mileage Bonus/Freq. Flyer Program	6.3%	7.6%	3.5%	5.9%	2.0%	7.4%	19.9%	10.3%	20.7%	1.6%	4.2%
Non-stop Flights	18.1%	15.4%	14.7%	17.6%	28.8%	25.5%	16.7%	17.2%	14.4%	12.2%	12.7%
On-time Reputation	1.2%	0.3%	0.5%	3.3%	1.3%	1.8%	5.0%	-	1.3%	2.9%	-
Previous Good Experience	8.8%	8.9%	7.5%	7.1%	12.5%	7.7%	15.8%	8.1%	6.1%	7.9%	9.6%
Safety Reputation	4.5%	1.1%	12.6%	2.2%	2.9%	1.7%	4.1%	6.1%	3.0%	1.0%	11.8%
Other	3.0%	5.1%	4.0%	7.3%	2.3%	8.3%	2.8%	-	-	2.2%	5.5%

* Denotes small sample.

** Percentages based on total number of respondents.

*** Multiple Response. Based on the top three choices in aggregate.

Texas Overseas Visitors 2014 Report



	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What were your three main reasons for flying on this airline?*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	107	104	84*	234	269	227	1,021	886	591	1058	322
Not Involved in Choice	7.1%	1.3%	7.1%	6.5%	3.0%	3.3%	3.8%	5.8%	8.3%	5.1%	5.7%
Involved in Choice***	92.9%	98.7%	92.9%	93.5%	97.0%	96.7%	96.2%	94.2%	91.7%	94.9%	94.3%
Airfare	45.4%	15.4%	51.5%	37.3%	56.4%	37.1%	56.6%	34.3%	47.1%	43.0%	54.1%
Convenient Schedule	45.5%	30.9%	56.0%	51.9%	43.2%	41.1%	40.9%	42.0%	40.4%	48.6%	48.3%
Employer Policy	7.1%	16.0%	8.2%	10.5%	7.4%	8.6%	4.1%	13.9%	5.4%	9.2%	1.4%
In-flight Service Reputation	10.0%	28.5%	2.5%	4.9%	3.6%	9.2%	9.5%	12.5%	9.5%	10.6%	8.8%
Loyalty to Carrier	5.6%	14.1%	5.1%	7.1%	10.5%	12.7%	8.5%	10.4%	9.4%	6.4%	9.7%
Mileage Bonus/Freq. Flyer Program	18.0%	34.0%	13.6%	18.1%	23.9%	19.5%	17.2%	26.4%	24.0%	17.4%	19.2%
Non-stop Flights	15.5%	37.0%	28.4%	32.3%	38.7%	51.8%	32.3%	33.7%	25.3%	27.6%	37.3%
On-time Reputation	21.1%	9.6%	11.5%	4.2%	11.1%	9.1%	10.6%	9.9%	8.8%	11.9%	6.6%
Previous Good Experience	24.2%	36.8%	15.4%	33.5%	19.1%	25.7%	25.9%	26.5%	18.9%	26.4%	31.7%
Safety Reputation	29.2%	31.0%	8.2%	9.2%	21.2%	9.8%	14.5%	16.1%	16.8%	14.8%	11.6%
Other	4.5%	1.2%	2.3%	8.1%	3.2%	2.0%	5.0%	2.6%	5.9%	3.9%	5.9%
What was the most important reason for flying on this airline? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	76*	77*	63*	187	180	150	763	672	414	784	254
Airfare	30.4%	5.8%	44.2%	20.5%	40.1%	22.4%	40.0%	18.0%	34.1%	29.6%	36.4%
Convenient Schedule	24.1%	15.6%	20.7%	24.1%	13.0%	18.0%	13.9%	20.1%	16.6%	21.7%	19.1%
Employer Policy	3.2%	7.5%	11.4%	7.5%	1.0%	6.7%	2.2%	11.3%	2.3%	6.7%	0.7%
In-flight Service Reputation	1.0%	6.2%	1.6%	0.8%	-	1.3%	1.0%	2.6%	1.4%	1.5%	3.3%
Loyalty to Carrier	1.3%	-	-	1.4%	1.2%	2.5%	3.0%	2.5%	4.2%	1.6%	2.1%
Mileage Bonus/Freq. Flyer Program	7.3%	10.9%	10.3%	6.2%	13.0%	5.5%	7.0%	5.8%	11.6%	4.1%	6.1%
Non-stop Flights	7.5%	28.2%	7.4%	18.4%	22.0%	36.9%	16.2%	21.7%	11.1%	17.4%	16.0%
On-time Reputation	3.1%	1.7%	-	0.6%	1.5%	0.5%	1.1%	1.4%	1.5%	1.5%	0.1%
Previous Good Experience	6.8%	9.5%	1.0%	13.5%	3.7%	3.6%	8.2%	9.3%	6.2%	8.7%	10.1%
Safety Reputation	11.9%	13.0%	2.5%	2.2%	2.6%	2.4%	4.2%	4.9%	5.5%	4.2%	0.8%
Other	3.4%	1.6%	0.9%	5.0%	1.9%	0.1%	3.3%	2.3%	5.5%	3.2%	5.2%

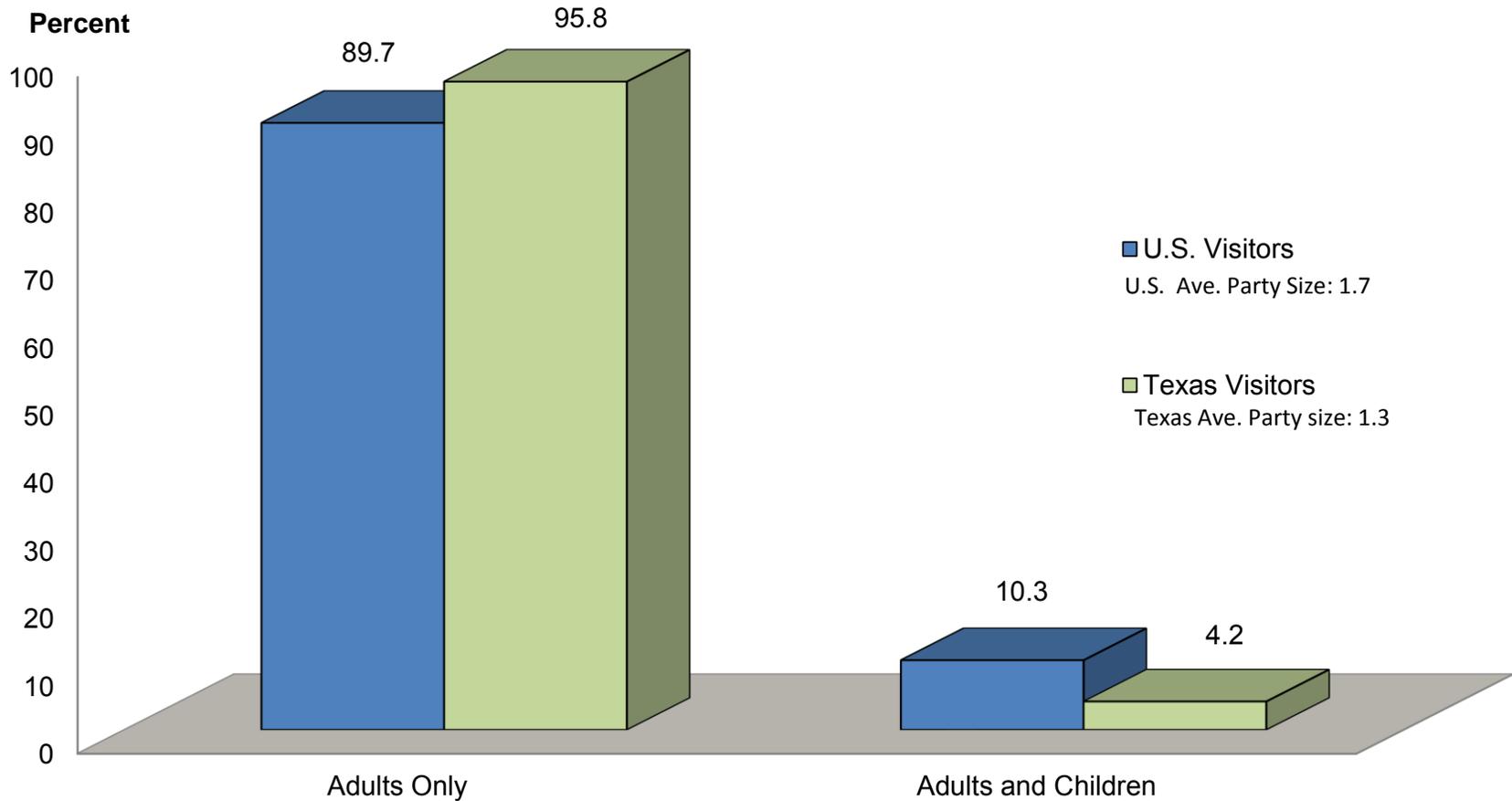
* Denotes small sample.

** Percentages based on total number of respondents.

*** Multiple Response. Based on the top three choices in aggregate.



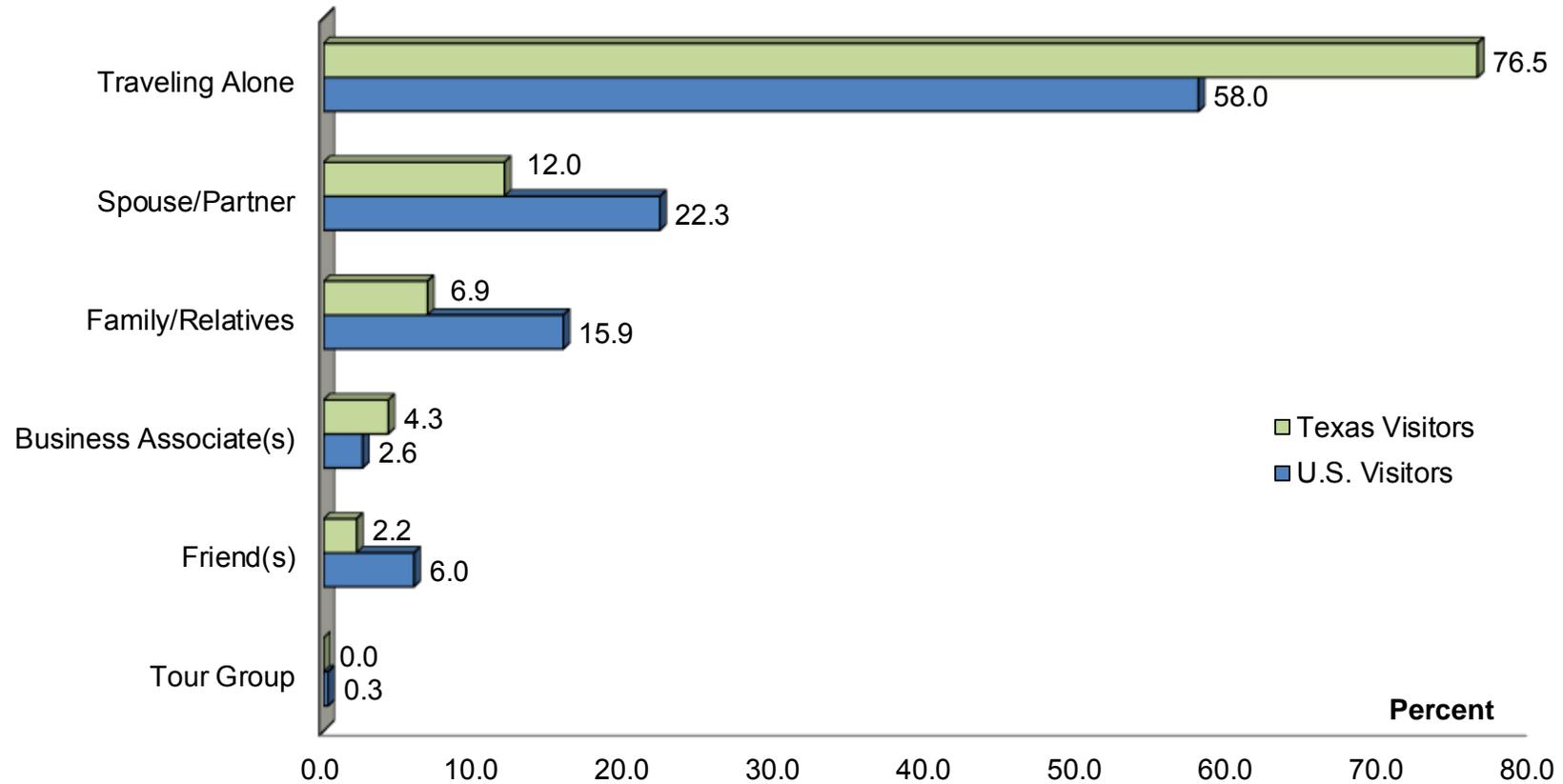
TRAVEL PARTY SIZE OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



TRAVEL PARTY COMPOSITION* OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014
* = multiple response



TRAVEL PARTY SIZE OVERSEAS VISITORS TO TEXAS 2014

- The average total party size for all overseas travelers to Texas was 1.3 persons (unchanged). Overall, 96% of overseas travelers were adults and only 4% were adults traveling with children, basically unchanged from 2013.

Table: Travel Party Size

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Including yourself, how many adults and/or children are in your travel party? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,160	531	356	184	213	244	348	121	68*	423	213
Adults Only	95.8%	96.6%	95.5%	89.6%	97.5%	96.5%	98.0%	97.3%	97.4%	98.3%	94.1%
Adults and Children	4.2%	3.4%	4.5%	10.4%	2.5%	3.5%	2.0%	2.7%	2.6%	1.7%	5.9%
Mean Total Party Size	1.3	1.4	1.4	1.5	1.4	1.3	1.4	1.3	1.3	1.2	1.4
Median Total Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Adults Only											
(Number of Respondents)	2,002	504	333	162	202	228	339	114	65*	412	199
One	79.7%	74.9%	78.0%	77.5%	73.3%	80.1%	75.0%	79.8%	80.2%	88.5%	68.5%
Two	17.6%	22.0%	19.2%	20.1%	23.2%	16.9%	17.5%	17.3%	15.8%	10.5%	30.1%
Three	1.7%	1.6%	1.9%	1.6%	2.5%	2.0%	4.2%	-	2.1%	0.8%	1.0%
Four or More	1.0%	1.4%	1.0%	0.8%	1.0%	0.9%	3.3%	2.9%	1.9%	0.1%	0.4%
Mean Adult Party Size	1.2	1.3	1.3	1.3	1.3	1.3	1.4	1.3	1.3	1.1	1.3
Median Adult Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Adults and Children											
(Number of Respondents)	158	27*	23*	22*	11*	16*	9*	7*	3*	11*	14*
Mean Party Size	3.5	2.6	3.1	3.4	4.2	3.2	3.4	2.9	3.0	3.5	3.1
Median Party Size	3.0	2.0	3.0	3.0	4.0	2.0	4.0	3.0	3.0	3.0	3.0

* Denotes small sample.

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Table: Travel Party Size (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Including yourself, how many adults and/or children are in your travel party? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	122	111	109	269	309	282	1,208	1,012	678	1269	356
Adults Only	95.8%	97.8%	92.6%	95.7%	88.8%	95.8%	93.1%	99.1%	93.9%	95.9%	94.8%
Adults and Children	4.2%	2.2%	7.4%	4.3%	11.2%	4.2%	6.9%	0.9%	6.1%	4.1%	5.2%
Mean Total Party Size	1.3	1.4	1.3	1.3	1.4	1.3	1.4	1.2	1.5	1.3	1.5
Median Total Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Adults Only											
(Number of Respondents)	112	108	95*	244	270	244	1,064	991	620	1172	329
One	85.1%	76.4%	86.1%	83.0%	84.1%	86.1%	74.7%	85.3%	72.3%	82.8%	66.7%
Two	13.1%	16.0%	12.0%	15.3%	13.7%	12.1%	22.4%	11.9%	24.7%	14.6%	29.8%
Three	1.1%	5.4%	1.9%	1.1%	1.8%	1.0%	1.9%	1.8%	1.4%	1.8%	1.8%
Four or More	0.6%	2.2%	-	0.6%	0.4%	0.7%	1.0%	0.9%	1.5%	0.8%	1.7%
Mean Adult Party Size	1.2	1.4	1.2	1.2	1.2	1.2	1.3	1.2	1.4	1.2	1.4
Median Adult Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Adults and Children											
(Number of Respondents)	10*	3*	14*	25*	39*	38*	144	21*	58*	97*	27*
Mean Party Size	3.5	4.4	3.3	3.4	3.1	4.2	3.5	3.5	3.4	3.3	2.6
Median Party Size	4.0	4.0	3.0	3.0	3.0	4.0	3.0	4.0	3.0	3.0	2.0

* Denotes small sample.

Texas Overseas Visitors 2014 Report



TRAVEL COMPANION OVERSEAS VISITORS TO TEXAS 2014

- In 2014 the majority of Texas visitors traveled alone (77%). Travel with a spouse accounted for 12%, down from 13% in 2013. Leisure visitors were more likely to travel with a spouse and family comparably. Australians were most likely to travel with a spouse (22%), followed by travelers from the Netherlands (19%) and France (18%). Leisure travelers from the UK (24%) were also more likely to travel with a spouse.
- This is an area of potential growth for the state. A focused effort to expand travel companions and add time onto the trip would have a real impact in total visitors and spending.

Table: Travel Companion

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
With whom are you traveling now?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,147	528	356	183	213	244	347	121	68*	422	210
Spouse/Partner	12.0%	16.7%	16.6%	17.8%	18.5%	10.6%	3.2%	7.4%	10.7%	8.4%	22.3%
Family/Relatives	6.9%	7.4%	7.0%	12.8%	9.1%	8.9%	3.3%	4.2%	6.5%	2.7%	9.3%
Business Associate(s)	4.3%	2.8%	2.8%	2.0%	2.8%	2.3%	17.0%	11.3%	7.3%	1.9%	1.6%
Friend(s)	2.2%	2.6%	2.1%	0.4%	1.3%	2.9%	3.7%	0.7%	2.2%	0.6%	4.6%
Tour Group	-	0.1%	-	-	-	-	-	-	-	-	-
Traveling Alone	76.5%	72.5%	74.5%	69.6%	71.5%	77.3%	73.6%	77.7%	78.1%	87.1%	64.7%

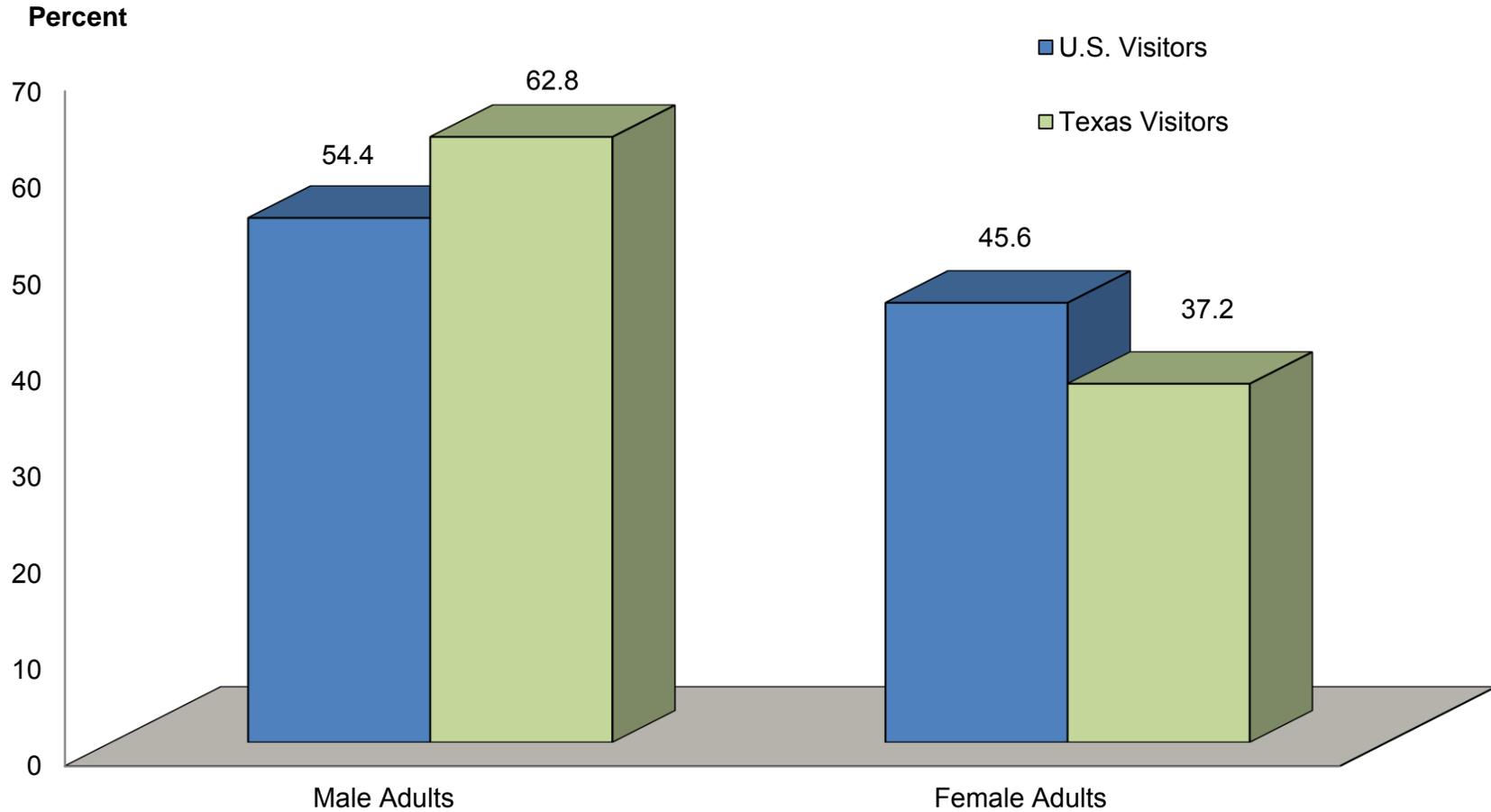
* Denotes small sample.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
With whom are you traveling now?*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	123	111	109	268	309	283	1,203	1,004	676	1261	355
Spouse/Partner	7.1%	2.3%	9.7%	6.7%	12.9%	8.8%	19.0%	3.7%	17.5%	10.3%	24.2%
Family/Relatives	6.4%	4.9%	9.0%	5.6%	11.8%	6.1%	11.1%	1.3%	8.7%	6.3%	11.2%
Business Associate(s)	1.9%	17.6%	1.3%	5.0%	0.9%	3.8%	0.2%	9.3%	4.1%	4.1%	0.7%
Friend(s)	3.9%	1.1%	4.5%	4.5%	2.9%	0.7%	3.1%	1.5%	4.6%	1.5%	3.4%
Tour Group	-	-	-	-	-	-	-	0.1%	0.1%	-	0.1%
Traveling Alone	81.6%	74.7%	79.7%	80.1%	74.7%	82.5%	69.7%	84.9%	68.2%	79.6%	63.3%

*** Multiple Response. For 2012+ the responses were weighted by the number of travel groups and are not comparable with prior years.



GENDER OF OVERSEAS VISITORS OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



AGE AND GENDER OVERSEAS VISITORS TO TEXAS 2014

- In 2014 travel by women was about the same as in 2013 (37% and 36% respectively), both down from 2011(41%). Nearly two thirds (63%) of the overseas visitors to Texas were male in 2014. By comparison, the U.S. average is more evenly split (54% male and 46% female).
- The average age of traveling adult males to Texas was 41 years old, basically unchanged over the past four years. In 2014 the average age for women was 39, slightly younger than last year.
- More women than men: In 2012 we first reported that the majority of the UK leisure visitors to Texas were female (52%). In 2014 the majority of all visitors from overseas leisure (52%) were women.
- India had the fewest female travelers (17%, up from 14% in 2013), followed by Japan (19%, on par with 2013).

Texas Overseas Visitors 2014 Report



Table: Age and Gender

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What is your age and what is your gender? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,982	496	319	175	200	231	326	114	66*	389	204
Male Adults	62.8%	57.9%	66.5%	56.2%	70.5%	70.1%	80.6%	59.8%	67.9%	83.0%	55.8%
18 - 24 Years	4.3%	8.2%	7.2%	3.3%	4.4%	7.3%	1.5%	1.4%	10.3%	1.8%	8.1%
25 - 29 Years	8.4%	5.0%	9.9%	12.1%	6.5%	4.2%	3.5%	19.5%	1.7%	16.9%	5.3%
30 - 34 Years	11.9%	6.5%	8.2%	4.9%	13.0%	11.4%	7.9%	19.4%	11.9%	18.8%	10.9%
35 - 39 Years	7.6%	3.3%	7.5%	4.7%	7.0%	6.8%	9.6%	5.8%	7.3%	15.9%	3.6%
40 - 44 Years	7.2%	7.1%	8.5%	10.1%	13.9%	8.9%	11.2%	5.3%	22.6%	8.8%	6.2%
45 - 49 Years	5.6%	5.3%	7.2%	1.8%	6.1%	7.7%	15.1%	2.2%	6.3%	5.5%	3.1%
50 - 54 Years	6.4%	7.7%	6.7%	4.9%	7.1%	7.4%	15.1%	1.1%	4.1%	4.2%	5.6%
55 - 64 Years	7.7%	8.1%	6.6%	10.0%	8.6%	12.7%	12.0%	4.0%	2.2%	8.2%	3.5%
65 or More Years	3.6%	6.7%	4.7%	4.3%	4.0%	3.7%	4.7%	1.1%	1.4%	2.9%	9.4%
Mean Male Age (Years)	41.2	43.9	41.1	42.4	42.2	42.9	46.1	34.4	37.9	38.9	41.9
Median Male Age (Years)	39.0	43.0	40.0	41.0	41.0	44.0	47.0	31.0	40.0	36.0	40.0
Female Adults	37.2%	42.1%	33.5%	43.8%	29.5%	29.9%	19.4%	40.2%	32.1%	17.0%	44.2%
18 - 24 Years	7.7%	5.0%	5.5%	7.2%	7.5%	6.2%	1.0%	15.9%	4.0%	1.0%	5.5%
25 - 29 Years	6.8%	5.7%	7.1%	6.2%	1.4%	1.7%	4.0%	7.0%	2.7%	1.7%	6.7%
30 - 34 Years	3.4%	3.9%	2.6%	5.8%	1.3%	6.3%	2.3%	6.4%	6.1%	1.9%	3.7%
35 - 39 Years	3.4%	3.3%	1.4%	5.4%	1.8%	1.6%	4.0%	2.3%	8.3%	1.2%	2.8%
40 - 44 Years	3.3%	4.1%	2.3%	2.2%	5.1%	1.5%	2.6%	2.4%	-	1.7%	5.6%
45 - 49 Years	2.4%	4.2%	2.8%	5.8%	2.1%	1.7%	0.5%	2.0%	-	0.6%	5.3%
50 - 54 Years	3.0%	4.0%	6.9%	2.2%	3.7%	2.4%	3.0%	1.6%	5.8%	1.4%	2.1%
55 - 64 Years	4.1%	6.9%	2.6%	4.4%	5.6%	6.5%	1.5%	0.3%	1.8%	2.8%	7.8%
65 or More Years	3.1%	5.1%	2.4%	4.6%	1.0%	2.1%	0.5%	2.1%	3.4%	4.8%	4.8%
Mean Female Age (Years)	38.7	43.9	39.9	39.9	41.2	41.2	38.8	31.3	39.6	48.4	43.0
Median Female Age (Years)	35.0	42.0	40.0	36.0	43.0	38.0	36.0	29.0	35.0	52.0	41.0

* Denotes small sample.

Texas Overseas Visitors 2014 Report



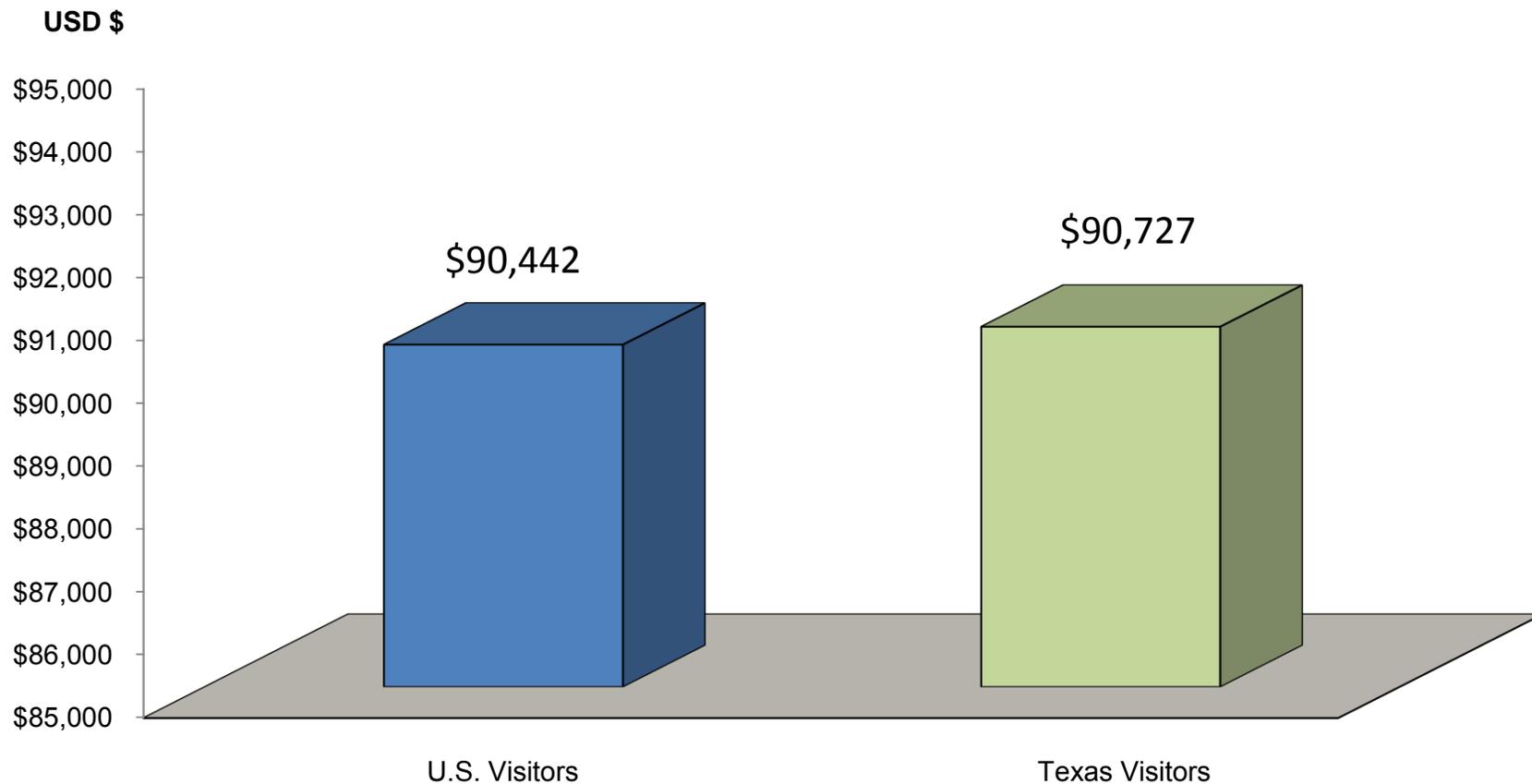
Table: Age and Gender (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What is your age and what is your gender? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	113	105	92*	249	276	259	1,103	952	621	1170	331
Male Adults	69.2%	73.1%	57.3%	69.7%	50.2%	75.6%	47.9%	83.4%	58.2%	63.2%	42.2%
18 - 24 Years	4.0%	-	1.5%	4.7%	4.8%	3.6%	5.5%	1.6%	8.0%	4.0%	10.8%
25 - 29 Years	6.8%	10.5%	4.8%	6.7%	2.9%	10.9%	7.3%	9.6%	6.7%	9.1%	4.7%
30 - 34 Years	14.5%	14.9%	6.0%	12.1%	6.3%	19.0%	7.8%	17.8%	12.7%	11.7%	4.0%
35 - 39 Years	5.6%	7.3%	6.0%	9.2%	7.0%	8.8%	4.5%	11.9%	6.6%	5.5%	1.4%
40 - 44 Years	12.2%	13.6%	17.8%	13.3%	8.3%	5.7%	4.7%	12.1%	5.8%	9.3%	3.2%
45 - 49 Years	10.3%	7.6%	6.0%	6.9%	0.8%	7.0%	2.9%	9.7%	5.2%	5.5%	1.2%
50 - 54 Years	7.0%	3.2%	7.1%	8.3%	10.4%	7.8%	3.9%	10.2%	3.6%	6.0%	2.7%
55 - 64 Years	8.2%	11.4%	3.4%	7.4%	7.1%	9.9%	6.4%	8.5%	5.6%	8.5%	5.6%
65 or More Years	0.7%	4.7%	4.9%	1.2%	2.6%	2.8%	4.9%	2.1%	4.1%	3.7%	8.5%
Mean Male Age (Years)	40.6	43.0	43.4	40.7	43.3	40.3	41.4	41.3	39.3	41.5	42.8
Median Male Age (Years)	40.0	40.0	40.0	41.0	41.0	37.0	39.0	40.0	35.0	40.0	40.0
Female Adults	30.8%	26.9%	42.7%	30.3%	49.8%	24.4%	52.1%	16.6%	41.8%	36.8%	57.8%
18 - 24 Years	7.2%	2.6%	2.5%	8.8%	9.2%	4.3%	10.1%	1.4%	8.8%	5.0%	7.1%
25 - 29 Years	5.2%	4.4%	10.4%	5.5%	9.6%	3.2%	9.6%	4.7%	6.6%	8.2%	7.5%
30 - 34 Years	6.3%	7.4%	3.5%	3.8%	2.7%	2.8%	3.8%	3.3%	6.0%	3.3%	4.9%
35 - 39 Years	1.6%	1.0%	3.1%	1.3%	5.4%	2.7%	4.5%	2.0%	3.7%	4.1%	3.7%
40 - 44 Years	7.4%	-	3.0%	3.0%	2.6%	3.7%	5.3%	1.0%	4.4%	2.3%	5.6%
45 - 49 Years	2.1%	1.8%	10.6%	2.4%	5.2%	2.1%	3.3%	1.4%	3.1%	3.1%	5.7%
50 - 54 Years	0.3%	4.4%	1.1%	1.4%	4.1%	1.2%	4.4%	1.3%	2.8%	4.1%	5.9%
55 - 64 Years	0.7%	4.3%	6.9%	3.1%	7.7%	4.1%	5.8%	1.4%	4.4%	4.0%	9.8%
65 or More Years	-	1.1%	1.7%	1.0%	3.3%	0.3%	5.3%	0.2%	2.1%	2.7%	7.6%
Mean Female Age (Years)	32.6	40.5	41.2	35.1	40.0	39.1	39.7	36.3	37.3	39.5	44.5
Median Female Age (Years)	31.0	34.0	42.0	30.0	37.0	38.0	36.0	32.0	34.0	37.0	45.0

* Denotes small sample.



AVERAGE ANNUAL HOUSEHOLD INCOME OF OVERSEAS VISITORS OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



ANNUAL HOUSEHOLD INCOME OVERSEAS VISITORS TO TEXAS 2014

- The average household income for overseas visitors to Texas was \$90,727, down from \$96,714 in 2013 and \$94,364 in 2012.
- During 2014 visitors from Nordic countries reported the highest annual average income. Japan was second, followed by Australian travelers, all well above the overseas average.
- In contrast, visitors from India reported the lowest household income by country.

Texas Overseas Visitors 2014 Report



Table: Annual Household Income

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What is your total combined annual household income? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
Number of Respondents	1,345	316	168	110	106	160	243	89*	45*	261	147
Under \$20,000	17.1%	3.2%	10.1%	7.9%	13.8%	19.4%	4.5%	20.3%	9.5%	39.7%	1.7%
\$20,000 - \$39,999	13.4%	9.1%	10.2%	20.5%	4.9%	6.9%	5.0%	21.0%	13.8%	15.1%	11.6%
\$40,000 - \$59,999	14.8%	11.6%	17.5%	21.7%	14.0%	13.2%	10.2%	11.0%	27.2%	12.1%	13.7%
\$60,000 - \$79,999	10.7%	13.0%	6.9%	11.3%	12.7%	11.7%	12.6%	18.0%	22.7%	8.0%	8.8%
\$80,000 - \$99,999	8.3%	15.8%	9.3%	8.9%	5.0%	8.8%	13.5%	5.8%	5.1%	6.8%	14.3%
\$100,000 - \$119,999	8.4%	15.3%	11.6%	5.0%	16.6%	8.3%	10.5%	4.4%	4.3%	6.4%	13.4%
\$120,000 - \$139,999	6.2%	4.8%	10.8%	6.7%	13.4%	7.5%	8.6%	0.7%	1.6%	3.4%	12.0%
\$140,000 - \$159,999	5.2%	11.1%	3.5%	4.4%	10.2%	3.9%	15.5%	0.7%	-	1.9%	3.9%
\$160,000 - \$179,999	3.3%	2.7%	5.5%	1.5%	2.7%	0.4%	2.9%	6.3%	6.1%	1.8%	3.9%
\$180,000 - \$199,999	1.8%	3.0%	2.3%	1.6%	2.2%	-	2.5%	-	1.5%	1.2%	2.1%
\$200,000 - \$219,999	3.7%	1.3%	7.4%	4.9%	1.6%	6.5%	3.1%	9.6%	-	2.6%	2.6%
\$220,000 - \$239,999	1.0%	0.7%	-	0.9%	-	1.3%	0.1%	-	-	-	0.5%
\$240,000 - \$259,999	1.4%	2.4%	0.4%	1.3%	-	5.9%	2.2%	-	-	0.9%	4.7%
\$260,000 - \$279,999	0.7%	0.8%	1.8%	-	2.2%	-	0.5%	-	-	0.1%	2.2%
\$280,000 - \$299,999	0.1%	-	-	-	-	-	1.0%	-	-	-	0.5%
\$300,000 or More	3.9%	5.1%	2.6%	3.4%	0.5%	6.1%	7.4%	2.2%	8.2%	-	4.1%
Mean Annual Income	\$90,727	\$115,315	\$100,654	\$87,596	\$92,559	\$102,413	\$123,236	\$74,222	\$104,686	\$51,239	\$119,737
Median Annual Income	\$67,231	\$96,268	\$89,071	\$54,159	\$92,015	\$75,000	\$100,265	\$50,610	\$56,400	\$32,440	\$99,938

* Denotes small sample.

Texas Overseas Visitors 2014 Report



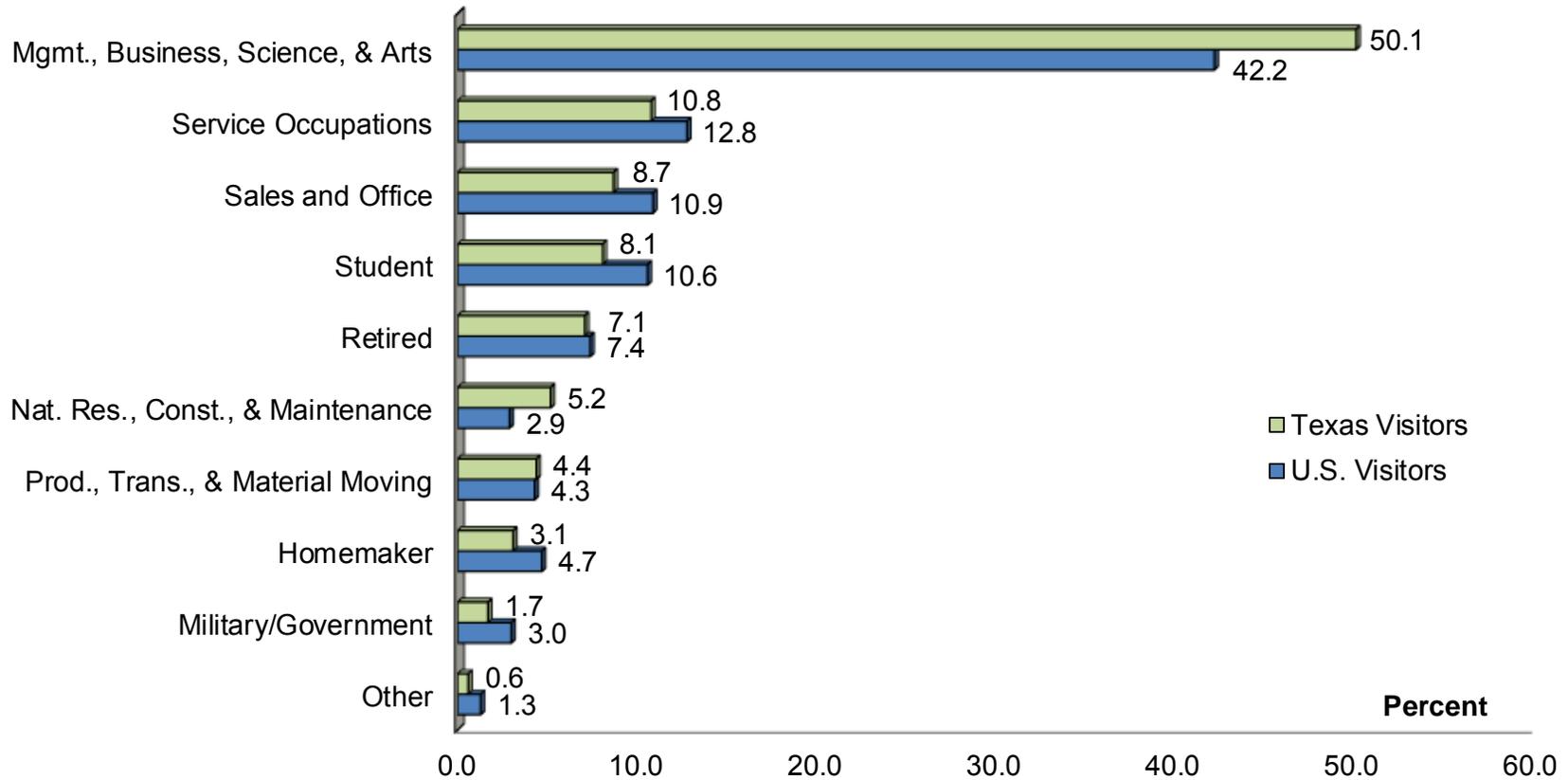
Table: Annual Household Income (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What is your total combined annual household income? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
Number of Respondents	71*	81*	68*	197	179	165	727	699	415	772	208
Under \$20,000	4.9%	11.2%	24.6%	12.1%	33.0%	31.7%	18.5%	14.6%	19.9%	21.3%	3.5%
\$20,000 - \$39,999	14.2%	24.8%	15.0%	6.1%	20.3%	15.4%	17.2%	7.9%	16.2%	14.2%	12.8%
\$40,000 - \$59,999	24.6%	7.5%	18.4%	7.0%	19.2%	5.7%	15.3%	14.2%	11.2%	14.8%	14.5%
\$60,000 - \$79,999	11.6%	9.0%	10.4%	7.4%	7.8%	13.9%	9.8%	12.1%	9.4%	9.7%	14.3%
\$80,000 - \$99,999	8.5%	10.0%	4.9%	5.3%	1.5%	4.5%	7.6%	10.7%	8.6%	7.7%	15.8%
\$100,000 - \$119,999	11.8%	16.9%	2.3%	14.3%	4.3%	5.4%	7.9%	9.3%	7.2%	7.3%	15.9%
\$120,000 - \$139,999	10.2%	1.0%	0.6%	7.3%	3.5%	5.0%	5.5%	6.7%	4.2%	6.7%	2.7%
\$140,000 - \$159,999	3.3%	4.9%	17.7%	9.4%	1.9%	5.7%	3.7%	6.5%	4.6%	4.8%	7.3%
\$160,000 - \$179,999	3.7%	4.0%	-	2.9%	0.1%	0.6%	4.1%	1.9%	4.0%	2.0%	2.3%
\$180,000 - \$199,999	0.9%	-	-	4.8%	4.1%	1.4%	1.8%	1.9%	0.9%	2.1%	3.3%
\$200,000 - \$219,999	2.7%	7.7%	0.5%	7.4%	1.8%	4.5%	2.5%	5.8%	7.2%	3.1%	0.6%
\$220,000 - \$239,999	-	-	-	2.2%	1.2%	-	1.1%	1.1%	0.8%	1.5%	0.6%
\$240,000 - \$259,999	1.5%	-	-	4.6%	0.4%	3.0%	0.9%	1.9%	1.9%	1.1%	2.1%
\$260,000 - \$279,999	2.1%	-	-	1.1%	-	-	0.6%	0.7%	0.6%	0.7%	0.4%
\$280,000 - \$299,999	-	-	-	-	-	-	-	0.2%	0.7%	-	-
\$300,000 or More	-	3.0%	5.6%	8.2%	0.9%	3.1%	3.5%	4.4%	2.7%	2.9%	3.7%
Mean Annual Income	\$86,520	\$88,552	\$74,926	\$131,389	\$55,458	\$75,285	\$82,606	\$101,208	\$90,121	\$82,627	\$100,302
Median Annual Income	\$64,604	\$68,860	\$50,000	\$114,397	\$37,572	\$50,000	\$58,725	\$80,000	\$65,064	\$59,000	\$83,414

* Denotes small sample.



OCCUPATION OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



OCCUPATION OVERSEAS VISITORS TO TEXAS 2014

- The majority of Texas visitors indicated their occupation was related to management/business/science/arts (50%). By comparison, the U.S. average for management was only 42 percent. This reflects the higher percent of business and technical-related travelers to Texas.
- All of the other occupation categories for Texas fall below or are about the same as the U.S. average, except for natural resource management. For Texas natural resource management was listed as an occupation for 5 percent of the visitors, compared to only 3% for the United States.

Table: Occupation

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What is your occupation? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,997	508	332	178	199	229	331	114	66*	395	205
Mgmt., Business, Science, & Arts	50.1%	44.2%	50.3%	42.2%	44.9%	60.3%	42.0%	51.0%	59.7%	47.9%	49.5%
Service Occupations	10.8%	6.6%	8.8%	12.4%	7.7%	11.1%	4.0%	4.0%	4.2%	26.6%	6.2%
Sales and Office	8.7%	6.2%	9.4%	5.2%	12.3%	5.5%	19.5%	9.7%	4.8%	1.7%	6.2%
Nat. Res., Const., & Maintenance	5.2%	6.8%	1.9%	0.7%	4.8%	4.3%	3.5%	4.3%	6.9%	2.7%	3.9%
Prod., Trans., & Material Moving	4.4%	2.2%	4.0%	4.6%	5.2%	0.4%	19.9%	5.5%	-	1.2%	3.3%
Military/Government	1.7%	2.8%	4.0%	1.5%	6.6%	0.6%	0.3%	0.1%	2.5%	1.3%	5.1%
Homemaker	3.1%	4.0%	1.7%	1.6%	2.4%	3.9%	3.2%	3.2%	4.1%	2.9%	4.9%
Student	8.1%	7.8%	11.1%	11.3%	8.8%	9.3%	3.3%	19.2%	12.9%	4.1%	8.4%
Retired	7.1%	17.1%	7.2%	12.6%	6.8%	2.9%	1.9%	2.9%	5.0%	11.2%	10.7%
Other	0.6%	2.4%	1.7%	7.8%	0.5%	1.7%	2.4%	-	-	0.4%	2.0%

* Denotes small sample.

Texas Overseas Visitors 2014 Report



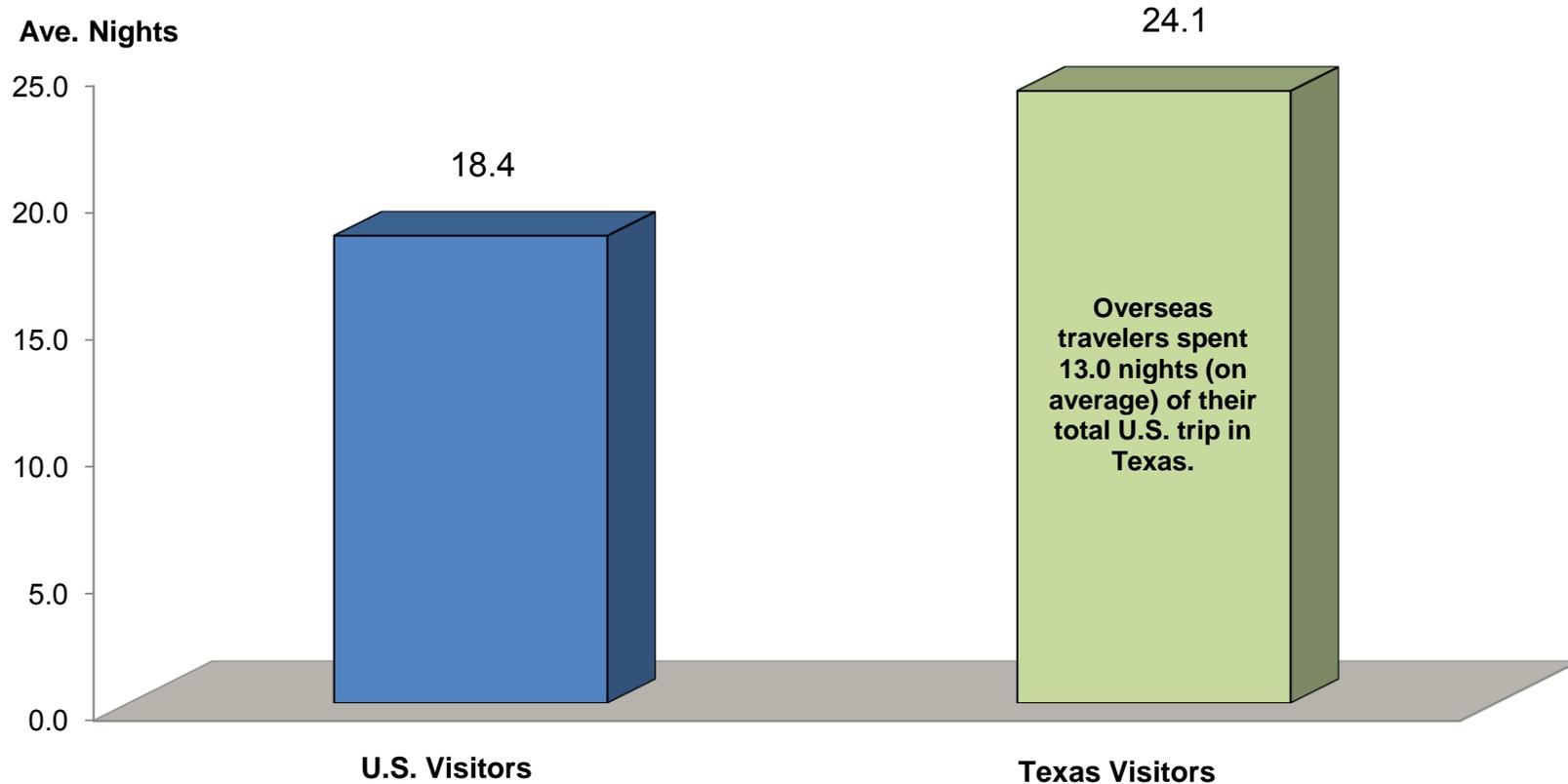
Table: Occupation (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What is your occupation? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	113	105	93*	250	275	264	1,110	958	628	1166	337
Mgmt., Business, Science, & Arts	55.4%	57.2%	49.8%	56.4%	51.5%	51.6%	44.0%	64.9%	48.0%	52.2%	36.6%
Service Occupations	16.1%	6.1%	6.2%	11.0%	8.7%	16.3%	11.9%	9.7%	11.8%	8.4%	7.1%
Sales and Office	8.5%	19.5%	8.8%	6.3%	7.9%	1.5%	9.6%	8.2%	6.7%	6.4%	6.3%
Nat. Res., Const., & Maintenance	3.4%	-	7.7%	4.8%	3.7%	5.8%	3.4%	7.9%	2.6%	5.0%	3.1%
Prod., Trans., & Material Moving	1.6%	7.0%	4.7%	3.4%	8.9%	3.2%	2.8%	6.2%	2.5%	5.7%	1.3%
Military/Government	2.2%	1.1%	3.5%	0.8%	0.5%	0.8%	2.4%	0.4%	1.1%	2.4%	3.7%
Homemaker	-	-	3.5%	0.6%	6.5%	3.9%	4.7%	0.2%	3.0%	3.8%	5.7%
Student	9.8%	4.0%	3.2%	13.7%	6.9%	12.1%	9.8%	1.9%	16.2%	8.2%	11.0%
Retired	2.0%	4.5%	10.7%	2.2%	5.3%	4.9%	10.6%	0.3%	6.5%	7.5%	23.7%
Other	1.1%	0.5%	2.0%	0.8%	0.2%	-	0.7%	0.3%	1.7%	0.4%	1.4%

* Denotes small sample.



TOTAL NIGHTS IN THE U.S. OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



NIGHTS AWAY FROM HOME OVERSEAS VISITORS TO TEXAS 2014

- Overseas visitors to Texas stayed an average of 24 nights in the U.S. for the entire trip (up from 21% in 2013, 23 nights in 2012, and down from 26 nights in the U.S. in 2011). By comparison, the average overseas visitor to the U.S. in 2014 only spent 18.4 total nights traveling throughout the United States.
- Overseas visitors to Texas spent 13 of their total 24 nights traveling throughout Texas. This means that overseas visitors to Texas spent 54% of their total U.S. trip in Texas, down from 62% in 2013 and 60% of their time in 2012.
- Travelers from South Korea (42 nights, on par with 2013), China (24 nights, down from 29 nights in 2013), and India (24 nights, up from 19 nights in 2013) had the longest length of stay in Texas overall. The longer length of stay is tied to stronger student and visit friends and family travel compared to the other markets.
- In contrast, travelers from Nordic countries, Australia, and France had the shortest length of stay in Texas, but had a higher tendency to be vacation, business, and convention visitors with fewer visiting friends and relatives and fewer students.
- In 2014 Japanese visitors spent 10 nights in Texas, on par with 2013 but up from 6 nights in 2012 and only 4 nights in 2011.

Texas Overseas Visitors 2014 Report



Table: Total Nights in Texas and in the U.S.

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Overall Nights in Texas											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,783	457	299	155	190	201	326	102	61*	299	192
Mean No. of Nights	13.0	11.0	11.2	9.5	9.7	11.4	9.8	24.4	41.8	24.3	8.8
Median No. of Nights	6.0	7.0	6.0	5.0	5.0	6.0	3.0	6.0	6.0	10.0	5.0

* Denotes small sample.

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How many nights in the U.S.A. have you spent on this trip? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,144	529	356	183	213	244	347	121	68*	409	213
1 - 3 Nights	9.7%	8.8%	9.2%	6.9%	11.0%	16.8%	22.6%	3.3%	17.1%	3.5%	3.4%
4 - 7 Nights	21.1%	24.5%	20.3%	22.8%	25.0%	20.1%	41.8%	16.6%	18.8%	14.7%	12.8%
8 - 10 Nights	14.8%	13.2%	16.1%	16.8%	6.5%	19.9%	15.3%	18.9%	8.6%	8.3%	15.9%
11 - 14 Nights	10.9%	17.0%	12.5%	17.9%	13.9%	7.7%	5.1%	14.5%	4.0%	10.2%	7.6%
15 - 21 Nights	17.2%	18.1%	18.5%	18.3%	8.6%	15.2%	4.6%	19.8%	15.7%	17.9%	20.3%
22 - 28 Nights	7.3%	6.4%	9.2%	4.7%	13.7%	5.8%	3.0%	0.5%	8.9%	7.3%	13.3%
29 - 35 Nights	5.1%	5.4%	4.8%	2.8%	9.3%	5.5%	1.5%	9.9%	1.0%	7.2%	14.1%
36 or More Nights	14.0%	6.7%	9.4%	9.7%	12.2%	8.9%	6.1%	16.5%	25.9%	30.9%	12.6%
Mean No. of Nights	24.1	16.0	19.7	19.5	20.3	17.9	13.8	37.1	48.9	40.1	23.3
Median No. of Nights	13.0	12.0	13.0	11.0	14.0	10.0	6.0	14.0	16.0	20.0	19.0

* Denotes small sample.

Texas Overseas Visitors 2014 Report



Table: Total Nights in Texas and in the U.S. (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Overall Nights in Texas											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	103	96*	81*	238	205	210	995	875	574	971	306
Mean No. of Nights	17.9	13.2	15.7	8.7	8.4	18.8	12.8	9.7	19.8	16.8	11.8
Median No. of Nights	6.0	4.0	5.0	6.0	6.0	8.0	7.0	5.0	12.0	10.0	7.0

* Denotes small sample.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How many nights in the U.S.A. have you spent on this trip? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	122	111	107	269	304	278	1,199	1,010	674	1257	355
1 - 3 Nights	5.9%	7.4%	15.1%	6.1%	18.6%	6.4%	5.5%	16.0%	9.7%	14.4%	4.0%
4 - 7 Nights	29.7%	28.0%	21.6%	27.2%	22.5%	18.0%	14.7%	32.0%	17.1%	23.9%	19.3%
8 - 10 Nights	14.5%	15.8%	14.0%	20.7%	15.0%	19.3%	14.5%	15.1%	12.2%	13.9%	12.3%
11 - 14 Nights	13.1%	16.5%	5.3%	11.7%	17.3%	12.4%	11.9%	9.6%	15.8%	11.7%	18.0%
15 - 21 Nights	15.7%	13.6%	11.3%	15.3%	15.4%	11.5%	21.7%	12.8%	16.5%	15.4%	24.8%
22 - 28 Nights	5.8%	2.7%	7.5%	7.6%	3.7%	7.5%	9.6%	3.9%	5.8%	6.1%	7.9%
29 - 35 Nights	4.0%	3.1%	8.1%	5.6%	1.2%	8.1%	7.0%	1.9%	8.1%	4.2%	6.6%
36 or More Nights	11.3%	12.8%	16.9%	5.8%	6.3%	16.8%	15.0%	8.8%	14.9%	10.4%	7.0%
Mean No. of Nights	24.2	20.8	23.5	16.1	13.8	31.2	25.5	17.4	26.4	18.4	18.0
Median No. of Nights	10.0	10.0	10.0	10.0	10.0	13.0	15.0	8.0	14.0	10.0	14.0

Texas Overseas Visitors 2014 Report



Table: Total Nights Away From Home

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How many total nights away from home have you spent on this trip?											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,056	512	338	180	205	234	338	112	61*	396	206
Mean No. of Nights	26.3	19.4	21.6	22.8	21.0	20.6	14.3	35.6	53.9	43.8	30.1
Median No. of Nights	15.0	14.0	14.0	14.0	14.0	12.0	7.0	17.0	18.0	22.0	23.0

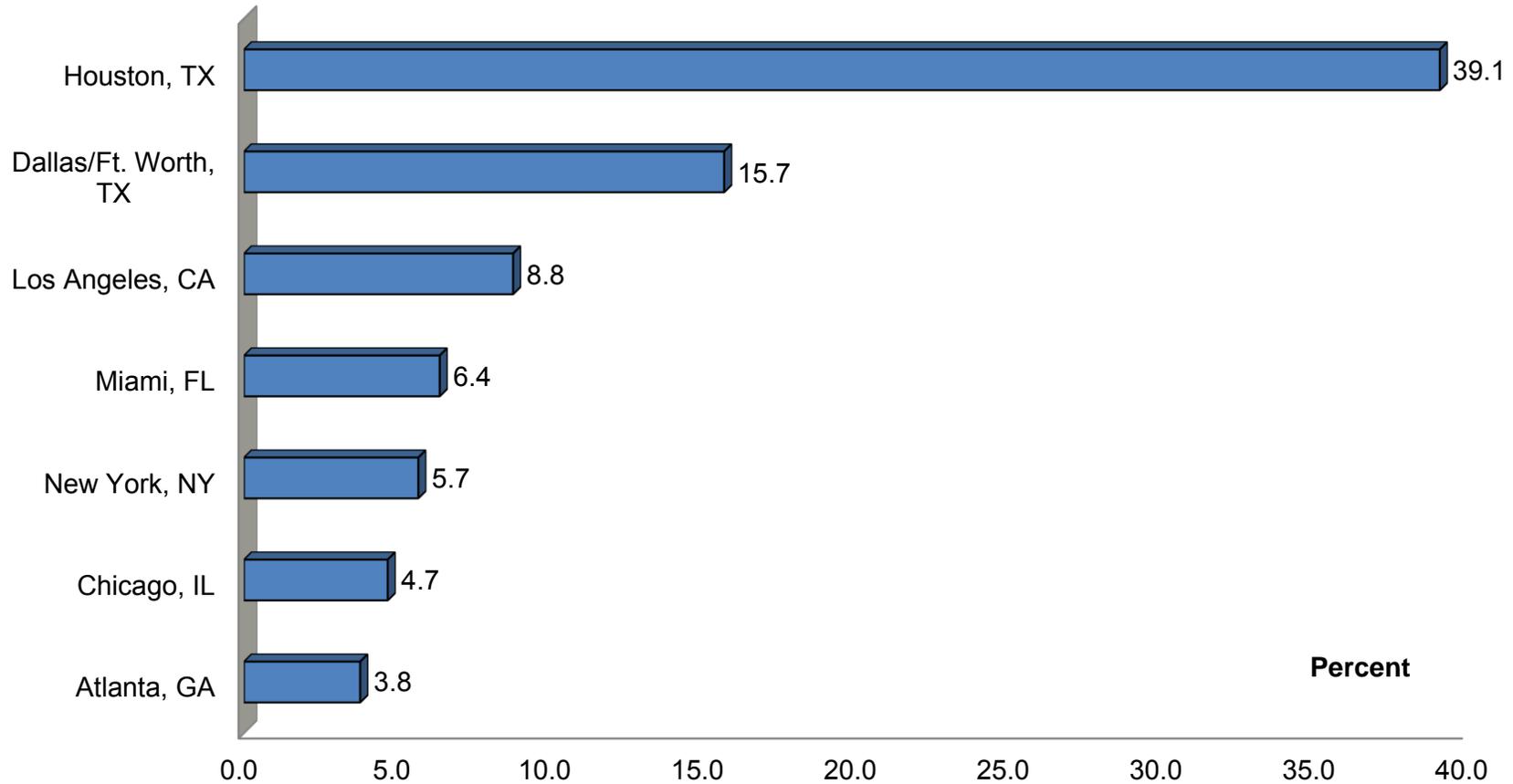
* Denotes small sample.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How many total nights away from home have you spent on this trip?											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	119	104	101	265	277	262	1,141	986	644	1196	346
Mean No. of Nights	26.0	21.6	26.3	17.3	15.6	31.5	27.1	20.6	27.9	21.9	21.6
Median No. of Nights	13.0	11.0	14.0	11.0	11.0	14.0	17.0	10.0	16.0	14.0	16.0

* Denotes small sample.



PORT OF ENTRY OF OVERSEAS VISITORS OVERSEAS VISITORS TO TEXAS 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



PORT OF ENTRY OVERSEAS VISITORS TO TEXAS 2014

- Over half (55%) of the overseas visitors to Texas entered the U.S. officially through Houston and Dallas ports of entry in 2014.
- Houston is the top port of entry overall (39%), followed by Dallas (16%). Houston is the top port of entry for all of the select markets except for Japan, Australia, South Korea, and Taiwan.
- Each port supported different markets.

Texas Overseas Visitors 2014 Report



Table: Port of Entry

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What city or airport did you pass through U.S. Customs and Passport Control (Port of Entry)** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	2,169	531	357	184	213	244	348	122	68*	424	213
Atlanta, GA	3.8%	7.8%	12.9%	2.8%	2.2%	12.1%	0.8%	-	-	0.6%	0.5%
Boston, MA	0.8%	1.8%	1.6%	4.3%	6.2%	-	0.5%	-	-	2.7%	-
Charlotte, NC	0.6%	0.6%	3.1%	1.1%	-	0.9%	-	-	-	-	-
Chicago, IL	4.7%	4.7%	8.6%	4.6%	3.1%	1.3%	8.8%	18.5%	1.0%	9.0%	-
Dallas/Ft. Worth, TX	15.7%	17.4%	22.5%	19.7%	6.6%	20.9%	16.1%	9.6%	21.7%	25.4%	33.1%
Denver, CO	0.6%	0.5%	4.0%	0.6%	-	-	1.4%	-	-	-	-
Detroit, MI	0.8%	0.3%	0.6%	0.4%	2.5%	0.5%	-	4.9%	13.4%	1.1%	-
Ft. Lauderdale, FL	0.5%	-	-	-	-	-	-	-	-	-	-
Honolulu, HI	0.2%	-	-	-	-	-	1.0%	0.5%	-	-	1.8%
Houston, TX	39.1%	42.9%	29.4%	38.9%	56.9%	34.2%	21.5%	19.7%	9.3%	32.4%	6.9%
Las Vegas, NV	0.1%	0.6%	0.3%	-	-	-	-	-	-	-	-
Los Angeles, CA	8.8%	2.6%	1.2%	2.3%	1.5%	0.4%	26.0%	19.3%	28.1%	3.0%	46.9%
Miami, FL	6.4%	3.5%	1.8%	12.0%	3.5%	25.2%	0.8%	-	-	0.4%	1.0%
Minn./St. Paul, MN	0.4%	0.6%	0.6%	4.0%	5.9%	-	0.7%	-	-	0.2%	-
New York, NY	5.7%	2.5%	3.1%	3.3%	0.6%	1.6%	2.3%	1.9%	5.0%	7.7%	2.0%
Newark, NJ	3.0%	4.0%	2.2%	2.8%	2.2%	1.0%	-	2.2%	-	7.7%	-
Orlando, FL	0.3%	0.3%	0.2%	-	-	-	-	-	-	0.1%	0.2%
Philadelphia, PA	1.0%	2.1%	0.6%	0.9%	2.1%	-	-	-	-	0.6%	-
San Francisco, CA	3.4%	1.4%	2.8%	1.7%	1.1%	-	7.7%	12.7%	8.1%	4.5%	6.7%
Seattle, WA	0.4%	1.5%	1.0%	-	0.5%	-	2.8%	4.2%	-	0.5%	-
Washington, DC	1.0%	2.2%	1.5%	0.3%	2.6%	1.7%	1.3%	0.7%	-	1.4%	-
All Other Airports/Cities	3.0%	2.6%	2.2%	0.2%	2.5%	0.3%	8.4%	5.7%	13.5%	2.8%	0.9%

* Denotes small sample.

** Data from the U.S. Department of Homeland Security I-94 air arrival records were used to realign missing responses by county of residence and U.S. airport of arrival.

Texas Overseas Visitors 2014 Report



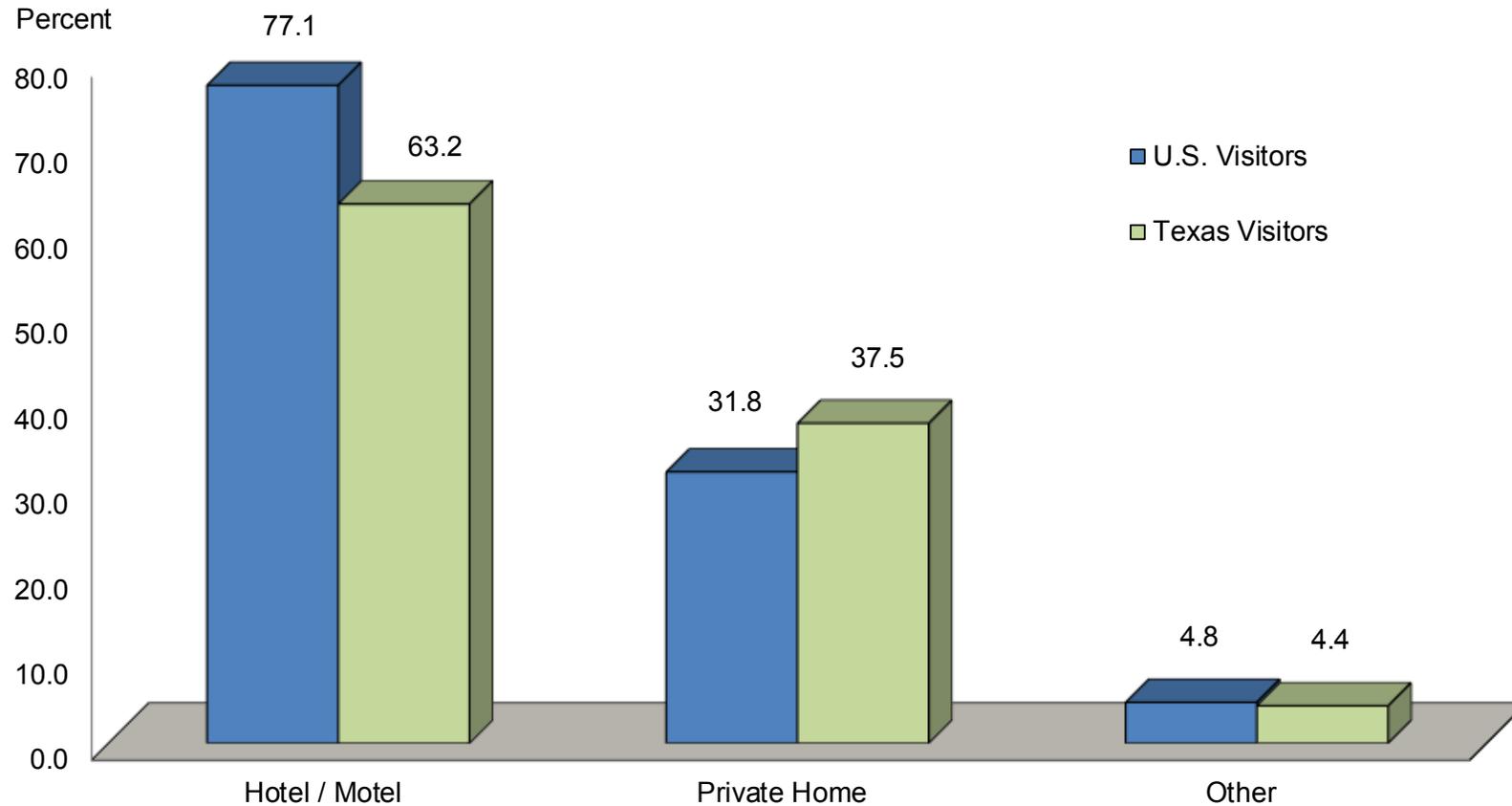
Table: Port of Entry (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What city or airport did you pass through U.S. Customs and Passport Control (Port of Entry)** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	123	111	110	269	312	284	1,212	1,014	680	1276	356
Atlanta, GA	10.0%	-	0.4%	3.6%	0.7%	0.3%	4.9%	2.6%	-	-	10.5%
Boston, MA	-	-	-	1.4%	-	0.5%	0.8%	0.5%	-	-	2.4%
Charlotte, NC	2.0%	-	-	0.3%	-	-	0.8%	0.4%	-	-	0.8%
Chicago, IL	4.3%	-	-	8.8%	-	7.9%	4.2%	5.7%	-	-	3.8%
Dallas/Ft. Worth, TX	14.8%	2.0%	6.4%	7.6%	15.0%	9.0%	16.8%	13.7%	100.0%	-	19.4%
Denver, CO	0.8%	-	-	0.8%	-	-	0.5%	0.4%	-	-	0.5%
Detroit, MI	4.8%	4.9%	-	4.0%	-	0.2%	1.0%	0.2%	-	-	0.2%
Ft. Lauderdale, FL	-	-	11.0%	0.6%	1.9%	-	0.6%	0.3%	-	-	-
Honolulu, HI	-	-	-	0.1%	-	-	0.4%	-	-	-	-
Houston, TX	30.9%	3.6%	60.8%	43.7%	65.4%	41.2%	32.9%	45.6%	-	100.0%	35.5%
Las Vegas, NV	-	-	-	-	-	-	0.2%	-	-	-	0.3%
Los Angeles, CA	2.2%	57.4%	5.4%	3.1%	0.8%	3.4%	9.1%	10.1%	-	-	3.0%
Miami, FL	9.2%	-	10.7%	0.5%	15.0%	0.4%	8.0%	3.9%	-	-	4.4%
Minn./St. Paul, MN	-	1.7%	-	0.6%	-	0.4%	0.5%	0.2%	-	-	0.7%
New York, NY	12.2%	9.4%	0.4%	7.0%	0.4%	20.1%	6.7%	4.6%	-	-	3.1%
Newark, NJ	5.4%	-	1.3%	11.2%	0.2%	9.5%	2.8%	3.3%	-	-	4.0%
Orlando, FL	0.7%	-	2.5%	-	0.4%	0.1%	0.4%	-	-	-	0.5%
Philadelphia, PA	1.0%	-	-	0.1%	-	-	1.2%	0.5%	-	-	2.7%
San Francisco, CA	0.9%	16.9%	-	2.6%	-	0.4%	3.6%	3.4%	-	-	1.6%
Seattle, WA	-	1.5%	-	0.9%	-	0.5%	0.6%	-	-	-	0.8%
Washington, DC	-	2.3%	0.9%	1.2%	-	4.8%	0.9%	1.7%	-	-	2.5%
All Other Airports/Cities	0.9%	0.3%	0.2%	1.8%	0.2%	1.4%	3.0%	2.9%	-	-	3.4%

** Data from the U.S. Department of Homeland Security I-94 air arrival records were used to realign missing responses by county of residence and U.S. airport of arrival.



ACCOMMODATIONS* OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014
* = multiple response



ACCOMMODATIONS OVERSEAS VISITORS TO TEXAS 2014

- In 2014, 63% of all overseas visitors to Texas choose to stay in a hotel room during their visit, up from 61% in 2013. The high percent of VFR makes this figure a bit lower than the U.S. average (77%).
- On average, overseas visitors spent 9.1 nights in a hotel in Texas during their visit.
- Japanese visitors to Texas have the highest need to stay in a hotel during their visit (88%, up from 83% in 2013 and 75% in 2012). Japanese visitors spent 6 nights on average in a hotel in Texas in 2014, about the same as last year.
- Texas VFR is high and so is the tendency to stay with friends and family when visiting Texas. Nearly two fifths (38%) of the overseas visitors indicated they stayed at a private home while in Texas in 2014. By comparison, staying in a home for the average overseas visitor to the U.S. was only 32 percent.
- British leisure visitors to Texas had the highest propensity to stay with family and friends in a private home – more than six out of ten (61%) stayed in a private home at some point during their 2014 visit.

Texas Overseas Visitors 2014 Report



Table: Type of Accommodation

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Type of accommodations and nights stayed in destination.** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,703	441	285	143	188	194	292	96*	59*	279	175
Hotel or Motel, etc.	63.2%	59.1%	64.5%	66.7%	70.5%	61.4%	87.9%	64.7%	60.9%	59.5%	70.8%
Mean No. of Nights	9.1	7.9	5.9	7.2	7.9	10.1	5.7	16.6	34.2	22.9	5.6
Median No. of Nights	4.0	5.0	4.0	5.0	5.0	5.0	3.0	6.0	4.0	10.0	4.0
Private Home	37.5%	43.5%	38.6%	35.0%	29.4%	38.6%	11.8%	28.7%	36.7%	41.4%	34.0%
Mean No. of Nights	17.0	13.5	18.5	13.2	12.8	15.1	27.9	51.6	64.4	21.1	13.2
Median No. of Nights	9.0	10.0	11.0	10.0	8.0	10.0	7.0	20.0	14.0	7.0	6.0
Other	4.4%	3.1%	4.0%	6.2%	9.5%	4.1%	1.6%	6.6%	2.4%	1.2%	2.7%
Mean No. of Nights	18.4	15.3	5.4	9.7	5.1	4.6	41.8	45.9	7.3	10.1	13.6
Median No. of Nights	4.0	7.5	3.0	4.0	4.0	3.0	20.0	2.0	7.0	1.0	5.0

* Denotes small sample.

** Multiple Response.

Note: Some respondents reported an accommodation type(s) for the destination, but did not report the number of nights stayed in each accommodation type.

Texas Overseas Visitors 2014 Report



Table: Type of Accommodation (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Type of accommodations and nights stayed in destination.** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	94*	83*	81*	236	209	204	957	833	541	927	292
Hotel or Motel, etc.	67.9%	66.4%	62.7%	68.4%	41.9%	58.6%	49.4%	87.2%	74.5%	68.9%	44.3%
Mean No. of Nights	5.6	9.8	4.4	6.9	3.9	10.6	7.9	8.4	15.7	9.6	7.4
Median No. of Nights	4.0	4.0	3.0	4.0	3.0	5.0	4.0	5.0	8.0	5.0	5.0
Private Home	30.1%	26.8%	41.3%	35.1%	57.2%	45.6%	52.5%	12.3%	40.5%	42.1%	60.7%
Mean No. of Nights	52.1	29.4	28.3	10.9	10.2	27.4	14.5	14.1	19.5	20.6	13.5
Median No. of Nights	14.0	5.0	14.0	9.0	8.0	11.0	9.0	6.0	11.0	14.0	10.0
Other	5.4%	6.8%	3.6%	3.8%	4.3%	3.7%	5.1%	2.6%	8.2%	3.4%	3.0%
Mean No. of Nights	3.6	8.5	3.6	4.2	24.2	15.6	19.1	11.6	6.4	17.0	15.3
Median No. of Nights	2.0	3.0	4.0	2.0	15.0	24.0	4.0	4.0	5.0	8.0	23.0

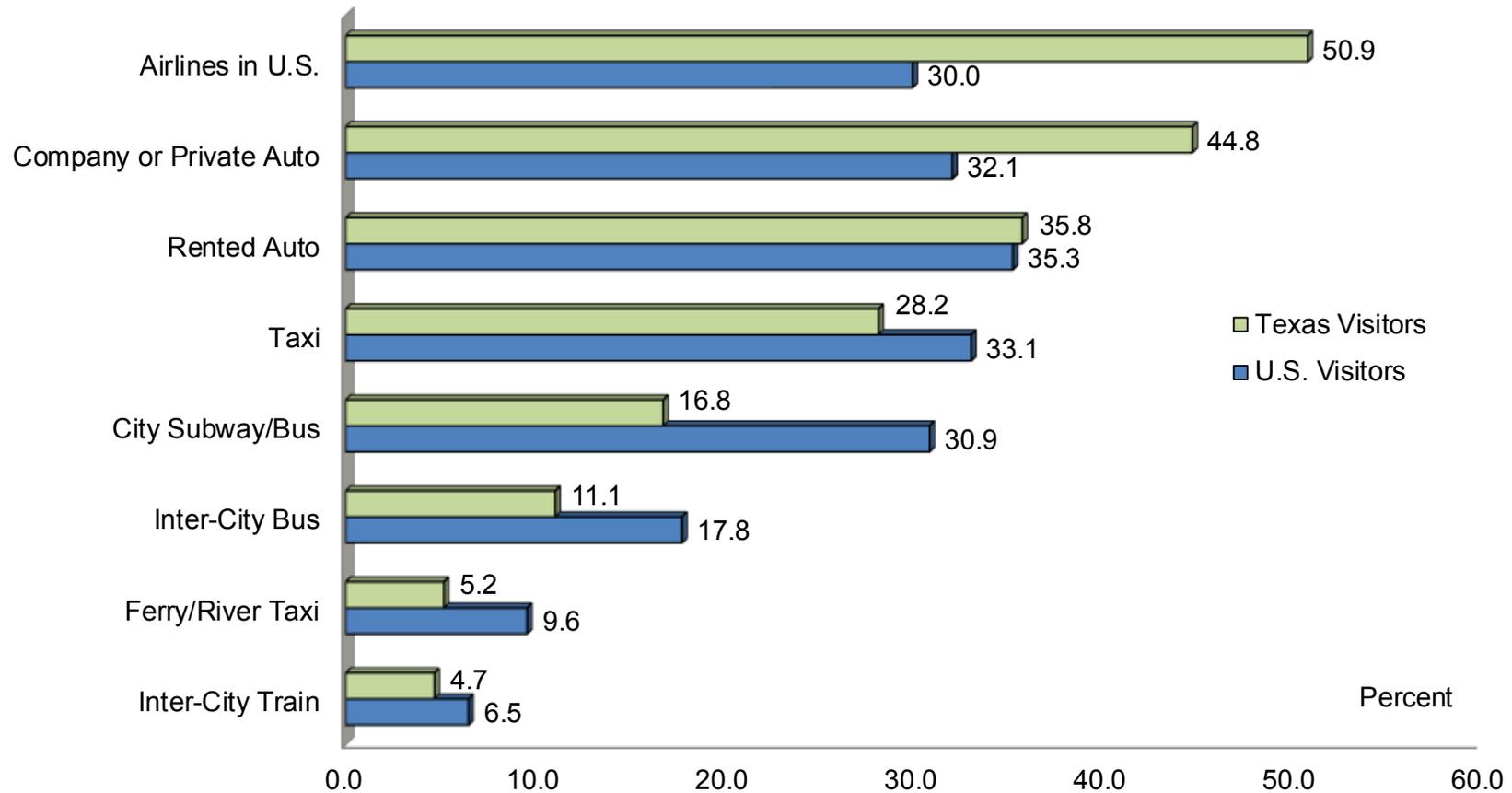
* Denotes small sample.

** Multiple Response.

Note: Some respondents reported an accommodation type(s) for the destination, but did not report the number of nights stayed in each accommodation type.



TRANSPORTATION IN THE U.S.* OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014
* = multiple response

Texas Overseas Visitors 2014 Report



TRANSPORTATION IN THE U.S. OVERSEAS VISITORS TO TEXAS 2014

- The predominant transportation used in the U.S. by visitors to Texas was air travel (51% - on par with 2013). In 2014 company or private auto was used by 45%, up slightly from 43% in 2013 but down slightly from 46% in 2012. Car rental (36%) was down slightly from 37% in 2013. All three modes of transportation are higher than the U.S. average.
- Texas visitors from Australia (75%), Taiwan (72%) and Japan (67%) were most likely to use airlines to travel around the United States.
- Texas visitors from Colombia (70%), the Netherlands (52%), and the UK (51%) had the highest propensity to use a corporate or private auto – clearly tied to corporate business travel.
- Travelers from Nordic countries (54%), France (48%), Germany (46%), Taiwan (46%), and the Netherlands (44%) had the highest propensity to rent a car during their visit to Texas.

Table: Transportation in the U.S.

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
What types of transportation were used on this trip?*** (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,836	445	325	162	192	217	325	108	60*	337	199
Air Travel between U.S. Cities	50.9%	36.7%	42.5%	33.6%	28.6%	60.7%	66.8%	64.3%	59.3%	56.4%	75.1%
Auto, Private or Company	44.8%	51.1%	45.0%	42.9%	51.9%	45.3%	32.4%	46.5%	38.8%	31.0%	41.3%
Bus between Cities	11.1%	12.7%	8.4%	5.7%	3.2%	5.9%	7.7%	9.6%	15.9%	10.9%	20.3%
City Subway/Tram/Bus	16.8%	12.5%	14.4%	19.1%	12.9%	11.0%	16.0%	16.3%	17.2%	17.6%	32.1%
Cruise Ship/River Boat 1+ Nights	2.5%	2.5%	2.3%	1.5%	0.3%	0.9%	0.3%	4.9%	1.2%	1.1%	10.1%
Ferry/River Taxi/Srt Scenic Cruise	5.2%	5.0%	5.7%	4.1%	3.8%	3.5%	1.5%	1.4%	3.3%	3.9%	21.8%
Motor Home/Camper	1.5%	1.9%	0.9%	0.4%	4.4%	0.8%	-	0.7%	1.5%	5.2%	1.4%
Railroad between Cities	4.7%	6.9%	4.1%	5.9%	4.3%	1.0%	5.5%	0.9%	1.3%	6.8%	7.2%
Rented Auto	35.8%	34.8%	45.9%	47.6%	43.8%	42.2%	25.3%	21.5%	27.2%	17.1%	42.4%
Rented Bicycle/Motorcycle/Moped	2.2%	0.3%	2.1%	3.5%	3.5%	0.2%	0.7%	1.8%	1.5%	1.4%	6.2%
Taxicab/Limousine	28.2%	32.6%	18.5%	22.2%	23.1%	24.8%	55.2%	19.9%	36.2%	43.1%	41.6%

* Denotes small sample.

** Multiple Response.

Texas Overseas Visitors 2014 Report



Table: Transportation in the U.S. (continued)

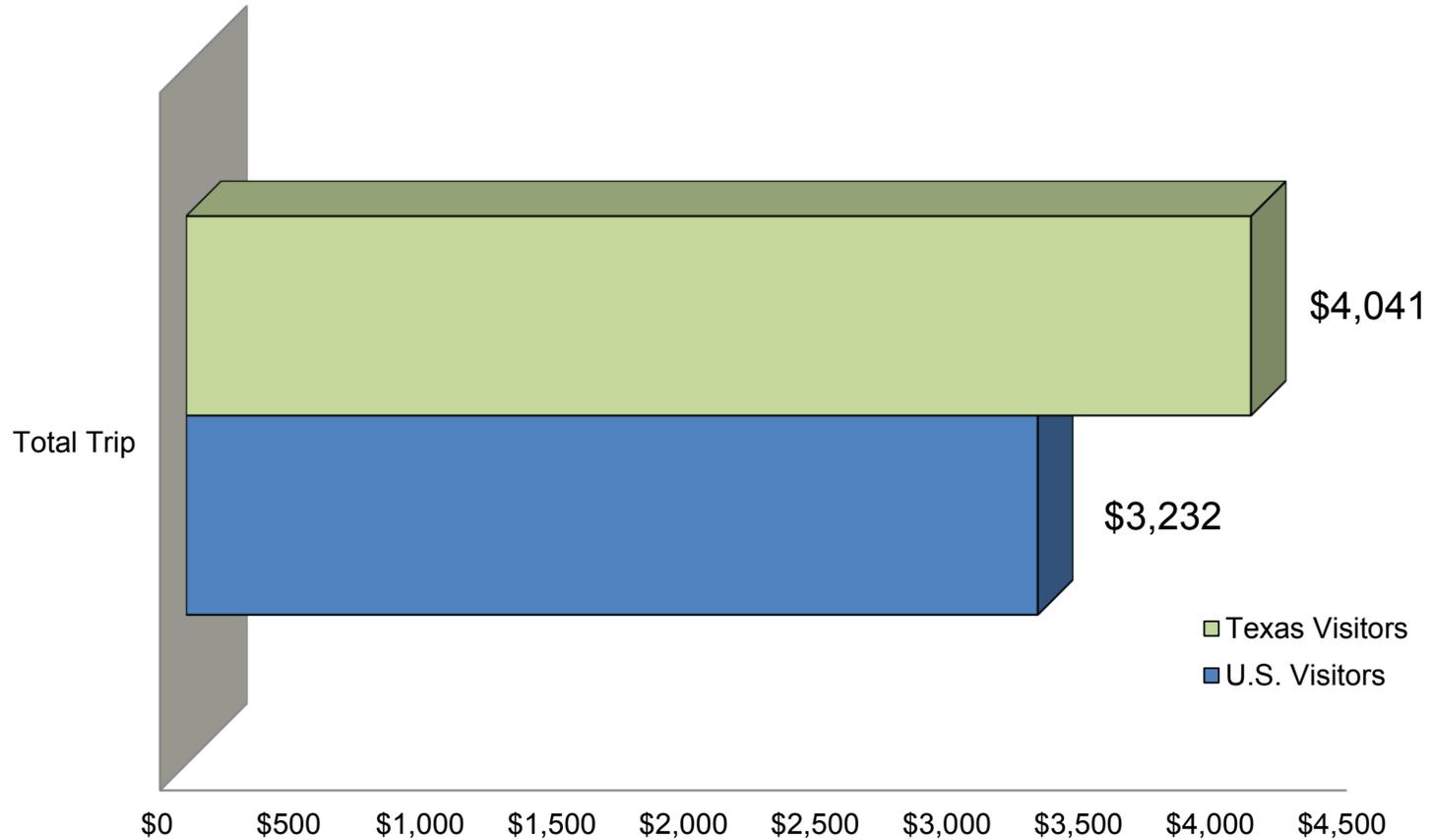
	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
What types of transportation were used on this trip?*** (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	108	105	81*	241	239	230	1,011	902	583	1013	296
Air Travel between U.S. Cities	52.3%	71.7%	54.3%	44.7%	43.4%	62.1%	54.0%	46.6%	55.0%	32.0%	39.7%
Auto, Private or Company	38.2%	35.0%	70.0%	46.9%	51.1%	34.7%	50.7%	36.6%	41.4%	45.8%	60.0%
Bus between Cities	11.1%	14.8%	13.4%	5.7%	7.6%	8.1%	14.1%	6.5%	14.6%	10.0%	18.3%
City Subway/Tram/Bus	21.4%	16.3%	10.7%	13.7%	8.9%	10.3%	22.4%	11.1%	22.3%	12.5%	16.8%
Cruise Ship/River Boat 1+ Nights	-	2.9%	1.8%	1.4%	-	0.6%	3.7%	0.9%	3.1%	1.5%	3.6%
Ferry/River Taxi/Srt Scenic Cruise	6.1%	2.5%	0.7%	5.6%	2.7%	2.8%	8.0%	1.6%	6.3%	3.2%	6.6%
Motor Home/Camper	1.3%	6.3%	1.8%	0.2%	-	3.1%	2.2%	0.4%	1.2%	0.7%	2.8%
Railroad between Cities	4.6%	1.0%	-	3.5%	1.3%	2.8%	6.5%	2.4%	5.8%	3.5%	10.0%
Rented Auto	39.7%	45.7%	43.3%	54.0%	36.4%	35.7%	35.2%	39.7%	30.4%	34.7%	30.8%
Rented Bicycle/Motorcycle/Moped	1.4%	2.1%	-	1.3%	0.2%	1.2%	3.1%	0.7%	0.9%	2.1%	0.4%
Taxicab/Limousine	25.7%	17.6%	8.6%	32.6%	14.1%	18.9%	24.8%	37.3%	29.7%	26.0%	24.9%

* Denotes small sample.

** Multiple Response.



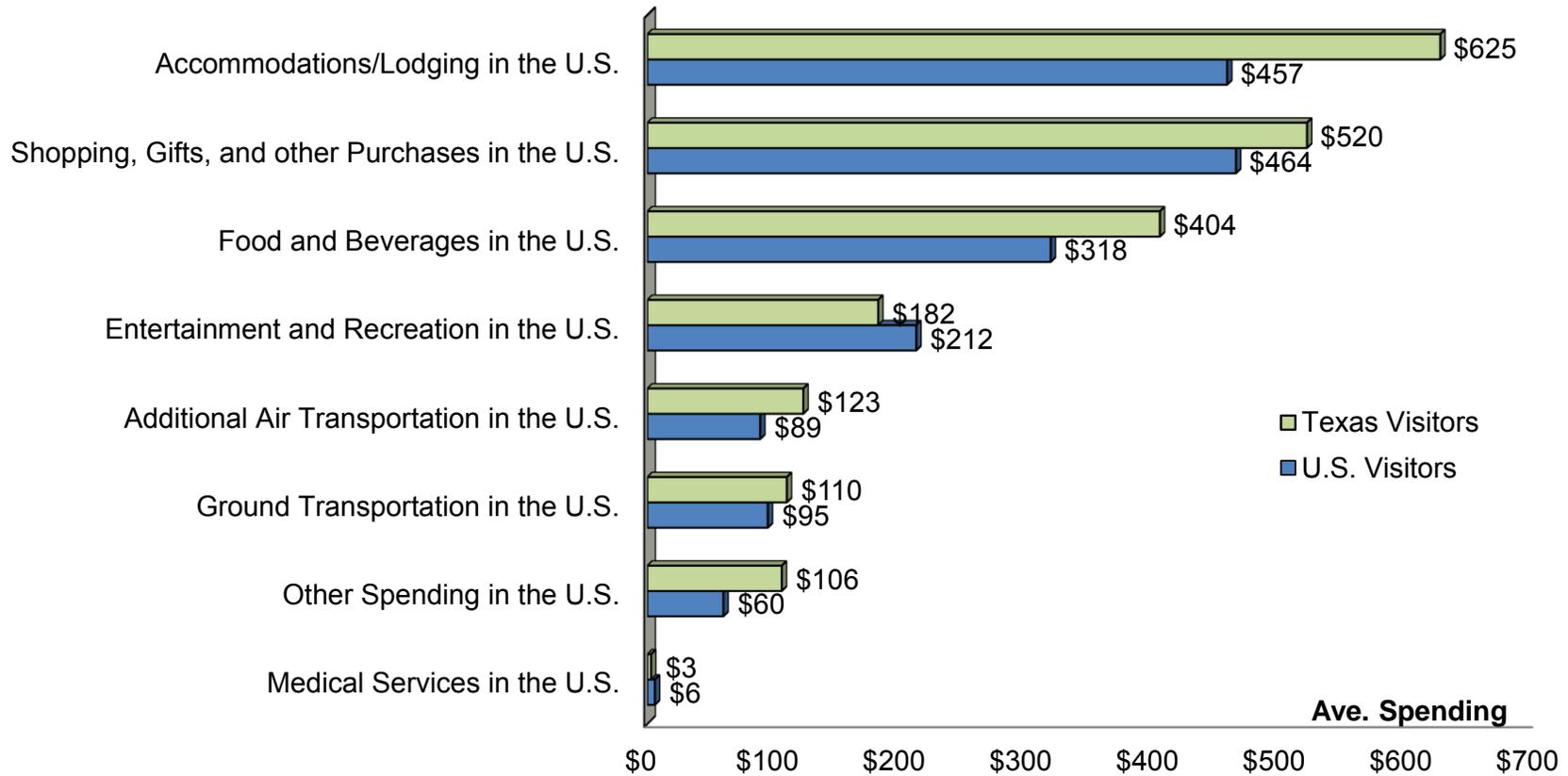
TRIP EXPENDITURES OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



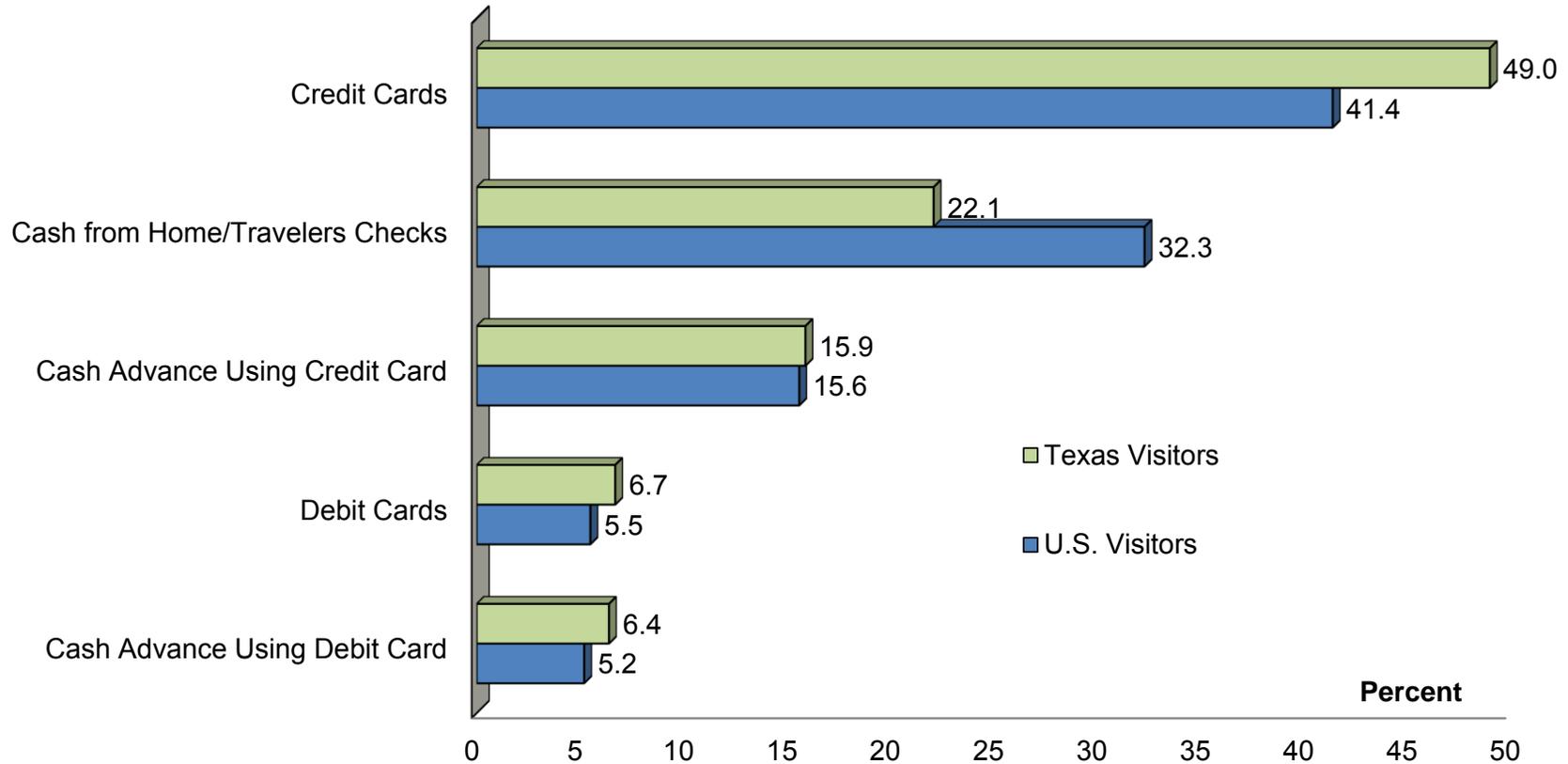
ITEMIZED TRIP EXPENDITURES OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



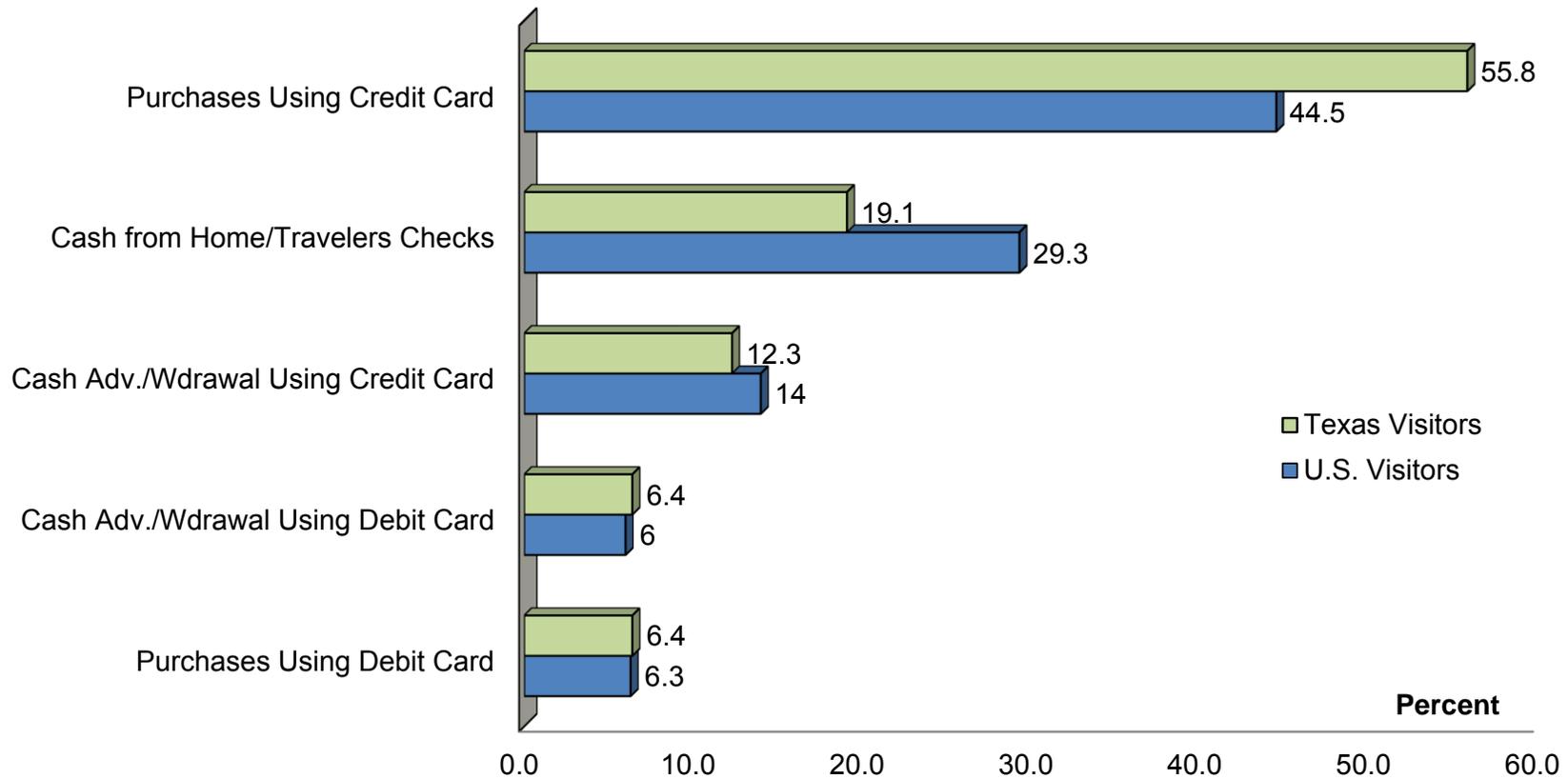
TRIP EXPENSES PAYMENT METHOD OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



SHARE OF EXPENDITURES BY METHOD OF PAYMENT OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



TRIP EXPENSES PAYMENT METHOD OVERSEAS VISITORS TO TEXAS 2014

- The trip expenses payment method predominately used by visitors to Texas in 2014 included credit cards (69%, up slightly from 66% in 2013). Cash from home was the second most commonly used method of payment (54%, down slightly from 57% in 2013).
- Visitors to Texas from the Netherlands (85%) and Italy (84%) had the highest propensity to use a credit card for purchases. In contrast, travelers from South Korea and India (52% and 55% respectively) were least likely to use a credit card for purchases

Table: Payment Methods and Share of Total Trip Expenditures by Payment Method

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Payment Methods (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
Expenses Payment Methods.** (%)											
(Number of Respondents)	1,586	393	258	146	160	180	299	90*	51*	248	178
Cash Adv./Withdrawal Using Credit Card	15.9%	11.1%	22.3%	20.4%	24.2%	10.0%	21.9%	12.2%	20.5%	21.4%	15.4%
Purchases Using Credit Card	49.0%	39.9%	55.6%	39.8%	57.4%	47.3%	50.2%	66.0%	43.8%	38.1%	38.2%
Cash Adv./Withdrawal Using Debit Card	6.4%	10.3%	2.3%	9.9%	10.6%	4.8%	1.1%	2.4%	3.6%	7.4%	14.5%
Purchases Using Debit Card	6.7%	10.8%	4.6%	3.8%	2.9%	6.3%	1.6%	4.0%	6.0%	7.8%	14.5%
Cash from Home/Travelers Checks	22.1%	27.9%	15.2%	26.0%	4.8%	31.6%	25.2%	15.5%	26.1%	25.4%	17.4%
Share of Total Trip Expenditures by Payment Methods.*** (%)											
(Number of Respondents)	1,157	304	187	116	127	133	206	64*	35*	136	146
Cash Adv./Withdrawal Using Credit Card	12.3%	8.6%	25.2%	17.3%	18.2%	14.2%	14.7%	3.1%	15.6%	16.8%	12.9%
Purchases Using Credit Card	55.8%	46.8%	58.6%	38.5%	66.5%	40.4%	58.3%	85.1%	26.7%	44.4%	42.1%
Cash Adv./Withdrawal Using Debit Card	6.4%	10.3%	2.0%	11.8%	6.1%	10.1%	1.7%	0.5%	10.1%	7.7%	13.9%
Purchases Using Debit Card	6.4%	9.8%	3.5%	4.2%	3.5%	6.7%	1.6%	1.4%	23.5%	7.4%	10.5%
Cash from Home/Travelers Checks	19.1%	24.5%	10.7%	28.2%	5.7%	28.6%	23.8%	9.9%	24.0%	23.7%	20.6%

* Denotes small sample.

** Average reported in each category.

*** Average reported in each category weighted by total trip expenditures.

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Table: Payment Methods and Share of Total Trip Expenditures by Payment Method (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Payment Methods (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
Expenses Payment Methods.** (%)											
(Number of Respondents)	95*	84*	75*	213	207	188	867	803	487	918	256
Cash Adv./Withdrawal Using Credit Card	15.6%	17.6%	23.0%	22.0%	10.9%	18.4%	15.9%	16.0%	15.1%	15.5%	8.4%
Purchases Using Credit Card	62.0%	46.0%	42.1%	55.9%	56.7%	50.0%	42.0%	58.7%	42.0%	48.5%	30.5%
Cash Adv./Withdrawal Using Debit Card	5.6%	0.4%	2.4%	4.1%	1.9%	7.2%	7.9%	4.5%	6.3%	5.4%	12.9%
Purchases Using Debit Card	0.8%	0.7%	4.4%	7.2%	1.8%	4.9%	7.6%	4.9%	7.3%	5.1%	13.5%
Cash from Home/Travelers Checks	16.0%	35.3%	28.1%	10.8%	28.7%	19.4%	26.6%	16.0%	29.3%	25.5%	34.7%
Share of Total Trip Expenditures by Payment Methods.*** (%)											
(Number of Respondents)	71*	55*	55*	165	156	130	668	585	370	659	205
Cash Adv./Withdrawal Using Credit Card	11.4%	11.7%	9.6%	21.4%	10.1%	11.3%	14.1%	11.1%	11.1%	14.6%	6.6%
Purchases Using Credit Card	71.0%	49.4%	46.0%	57.3%	58.3%	55.4%	39.7%	68.9%	47.4%	56.9%	34.5%
Cash Adv./Withdrawal Using Debit Card	4.2%	0.7%	10.7%	4.7%	2.5%	8.9%	9.9%	3.7%	5.2%	3.8%	13.6%
Purchases Using Debit Card	0.2%	1.9%	9.0%	9.0%	1.6%	5.2%	10.1%	3.4%	10.3%	5.3%	13.5%
Cash from Home/Travelers Checks	13.2%	36.3%	24.7%	7.6%	27.6%	19.2%	26.2%	12.9%	26.0%	19.4%	31.9%

* Denotes small sample.

** Average reported in each category.

*** Average reported in each category weighted by total trip expenditures.



TRIP EXPENDITURES OVERSEAS VISITORS TO TEXAS 2014

- Overseas visitors to Texas spent an average of \$4,041 per trip in 2014, up from \$3,709 per trip in 2013 and \$3,581 per trip in 2012.
- The biggest spenders on a total trip (including travel to Texas and other U.S. destinations) were visitors from China (\$6,866), followed by Taiwan (\$5,784), South Korea (\$5,082), and Japan (\$5,048).
- Overseas visitors spent the most on lodging when compared to the other itemized trip expenditures. Spending on shopping was a close second.
- The biggest spenders on shopping were from Brazil (\$968, down from \$1,038 in 2013) and the Chinese (\$812, down from \$984 in 2013).
- In contrast, visitors to Texas from the UK (\$188) and Japan (\$128) spent the least on shopping.

Note: Spending methodology in 2013 and 2012 changed from previous years. In 2012 a new survey method was developed by the USDOC, NTTO. In 2013 Texas Tourism adjusted the daily spend to reflect the U.S. average daily spend due to the variance in spending from the 2012 methodology change. Starting in 2013 Texas Tourism total direct spending is derived from:

1. Average daily spending by visitors to the U.S.
2. Average nights spent in Texas.
3. Estimated visitor arrivals to Texas.

Note: In 2014 the U.S. Department of Homeland Security and U.S. National Travel and Tourism Office established a new methodology for counting visitor arrivals to the USA – which technically creates a break in series from previous years. The methodology change should be considered when making 2014 and 2013 year over year comparisons for arrivals and total direct spending.

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Table: Trip Expenditures and Itemized Expenditures

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Itemized Trip Expenditures (\$)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
Mean Accommodations/Lodging in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$837	\$468	\$507	\$605	\$889	\$756	\$1,113	\$1,777	\$1,300	\$1,143	\$873
Per Visitor / Trip	\$625	\$346	\$375	\$407	\$642	\$573	\$773	\$1,341	\$973	\$979	\$603
Mean Additional Air Transportation in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$165	\$40	\$75	\$129	\$77	\$213	\$142	\$340	\$165	\$186	\$278
Per Visitor / Trip	\$123	\$30	\$55	\$87	\$56	\$161	\$99	\$257	\$123	\$159	\$192
Mean Entertainment and Recreation in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$244	\$240	\$150	\$137	\$150	\$266	\$103	\$262	\$184	\$148	\$643
Per Visitor / Trip	\$182	\$178	\$111	\$92	\$108	\$202	\$71	\$197	\$137	\$127	\$444
Mean Food and Beverages in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$541	\$401	\$278	\$432	\$390	\$597	\$388	\$914	\$723	\$553	\$787
Per Visitor / Trip	\$404	\$297	\$206	\$291	\$282	\$452	\$269	\$690	\$541	\$473	\$544
Mean Ground Transportation in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$147	\$72	\$116	\$103	\$148	\$256	\$234	\$131	\$181	\$189	\$244
Per Visitor / Trip	\$110	\$53	\$86	\$69	\$107	\$194	\$163	\$99	\$135	\$162	\$169
Mean Shopping, Gifts, and Other Purchases in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$697	\$254	\$306	\$388	\$621	\$1,277	\$184	\$1,076	\$662	\$342	\$502
Per Visitor / Trip	\$520	\$188	\$227	\$261	\$449	\$968	\$128	\$812	\$495	\$293	\$347
Mean Medical Services in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$5	\$4	\$0	\$1	\$0	\$4	\$0	\$16	\$0	\$0	\$2
Per Visitor / Trip	\$3	\$3	\$0	\$1	\$0	\$3	\$0	\$12	\$0	\$0	\$1
Mean Other Spending in the U.S.											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$142	\$74	\$86	\$16	\$36	\$152	\$103	\$238	\$302	\$107	\$67
Per Visitor / Trip	\$106	\$55	\$64	\$11	\$26	\$115	\$71	\$180	\$226	\$91	\$46

* Denotes small sample.

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Table: Trip Expenditures and Itemized Expenditures (continued)

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
How much total money has been spent outside your own country? (\$)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
Mean Total Trip Expenditure**											
(Number of Respondents)	1,294	337	217	125	142	155	215	71*	41*	163	161
Per Travel Party / Trip	\$5,414	\$3,703	\$3,910	\$4,276	\$4,345	\$5,749	\$7,270	\$9,098	\$6,791	\$4,786	\$7,193
Per Visitor / Trip	\$4,041	\$2,741	\$2,895	\$2,876	\$3,139	\$4,357	\$5,048	\$6,866	\$5,082	\$4,100	\$4,968
Mean Package Price											
(Number of Respondents)	60*	16*	3*	4*	1*	12*	23*	11*	2*	19*	14*
Per Travel Party / Trip	\$7,807	\$6,969	\$3,433	\$7,948	\$15,625	\$3,307	\$7,207	\$8,261	\$8,962	\$5,733	\$8,465
Per Visitor / Trip	\$5,214	\$3,633	\$2,145	\$4,045	\$5,258	\$2,367	\$4,035	\$6,083	\$5,774	\$5,062	\$6,274
Mean International Airfare											
(Number of Respondents)	877	247	161	81*	94*	106	129	46*	21*	92*	120
Per Travel Party / Trip	\$2,562	\$2,073	\$2,352	\$2,364	\$1,992	\$2,167	\$4,833	\$4,140	\$3,204	\$2,096	\$3,752
Per Visitor / Trip	\$1,923	\$1,564	\$1,748	\$1,630	\$1,447	\$1,648	\$3,434	\$3,140	\$2,407	\$1,790	\$2,575
Mean Expenditure in U.S. Airport											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$59	\$38	\$32	\$41	\$30	\$54	\$58	\$184	\$57	\$29	\$68
Per Visitor / Trip	\$44	\$28	\$24	\$27	\$22	\$41	\$40	\$139	\$43	\$25	\$47
Mean Expenditure in U.S.***											
(Number of Respondents)	966	247	146	96*	110	100	161	41*	30*	112	108
Per Travel Party / Trip	\$2,837	\$1,591	\$1,550	\$1,853	\$2,342	\$3,575	\$2,325	\$4,938	\$3,574	\$2,696	\$3,465
Per Visitor / Trip	\$2,117	\$1,178	\$1,147	\$1,246	\$1,692	\$2,709	\$1,614	\$3,727	\$2,675	\$2,310	\$2,393
Per Visitor / Day	\$88	\$73	\$58	\$64	\$83	\$151	\$117	\$100	\$55	\$58	\$103

* Denotes small sample.

** Total trip expenditure includes Expenditures in the U.S., plus a weighted proportion of Package Price and International Airfare.

*** Expenditure in the U.S. includes Expenditure in U.S. Airport.

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Table: Trip Expenditures and Itemized Expenditures (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
How much total money has been spent outside your own country? (\$)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
Mean Total Trip Expenditure**											
(Number of Respondents)	83*	64*	66*	179	184	151	758	635	415	731	232
Per Travel Party / Trip	\$3,447	\$8,240	\$3,728	\$4,835	\$2,750	\$6,562	\$4,978	\$5,989	\$5,918	\$4,928	\$3,597
Per Visitor / Trip	\$2,689	\$5,784	\$2,837	\$3,723	\$1,963	\$5,078	\$3,440	\$4,940	\$4,003	\$3,805	\$2,460
Mean Package Price											
(Number of Respondents)	1*	9*	2*	3*	4*	8*	34*	32*	36*	33*	13*
Per Travel Party / Trip	\$2,606	\$3,671	\$1,562	\$4,530	\$2,530	\$5,916	\$9,177	\$7,416	\$6,674	\$8,140	\$8,009
Per Visitor / Trip	\$2,119	\$1,842	\$1,030	\$1,944	\$2,436	\$4,358	\$4,708	\$6,040	\$3,271	\$5,808	\$3,625
Mean International Airfare											
(Number of Respondents)	58*	28*	44*	128	131	99*	542	401	273	505	175
Per Travel Party / Trip	\$1,689	\$3,657	\$1,694	\$2,028	\$1,091	\$2,622	\$2,193	\$3,128	\$2,711	\$2,475	\$1,875
Per Visitor / Trip	\$1,316	\$2,723	\$1,290	\$1,564	\$779	\$2,036	\$1,532	\$2,583	\$1,888	\$1,922	\$1,313
Mean Expenditure in U.S. Airport											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$27	\$43	\$34	\$63	\$39	\$87	\$54	\$70	\$62	\$48	\$31
Per Visitor / Trip	\$21	\$30	\$26	\$49	\$28	\$67	\$37	\$58	\$42	\$37	\$21
Mean Expenditure in U.S.***											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$1,760	\$4,360	\$2,032	\$2,804	\$1,659	\$3,931	\$2,761	\$2,857	\$3,127	\$2,439	\$1,677
Per Visitor / Trip	\$1,373	\$3,061	\$1,547	\$2,159	\$1,184	\$3,042	\$1,907	\$2,357	\$2,115	\$1,883	\$1,147
Per Visitor / Day	\$57	\$147	\$66	\$134	\$86	\$98	\$75	\$135	\$80	\$102	\$64

* Denotes small sample.

** Total trip expenditure includes Expenditures in the U.S., plus a weighted proportion of Package Price and International Airfare.

*** Expenditure in the U.S. includes Expenditure in U.S. Airport.

Texas Overseas Visitors 2014 Report



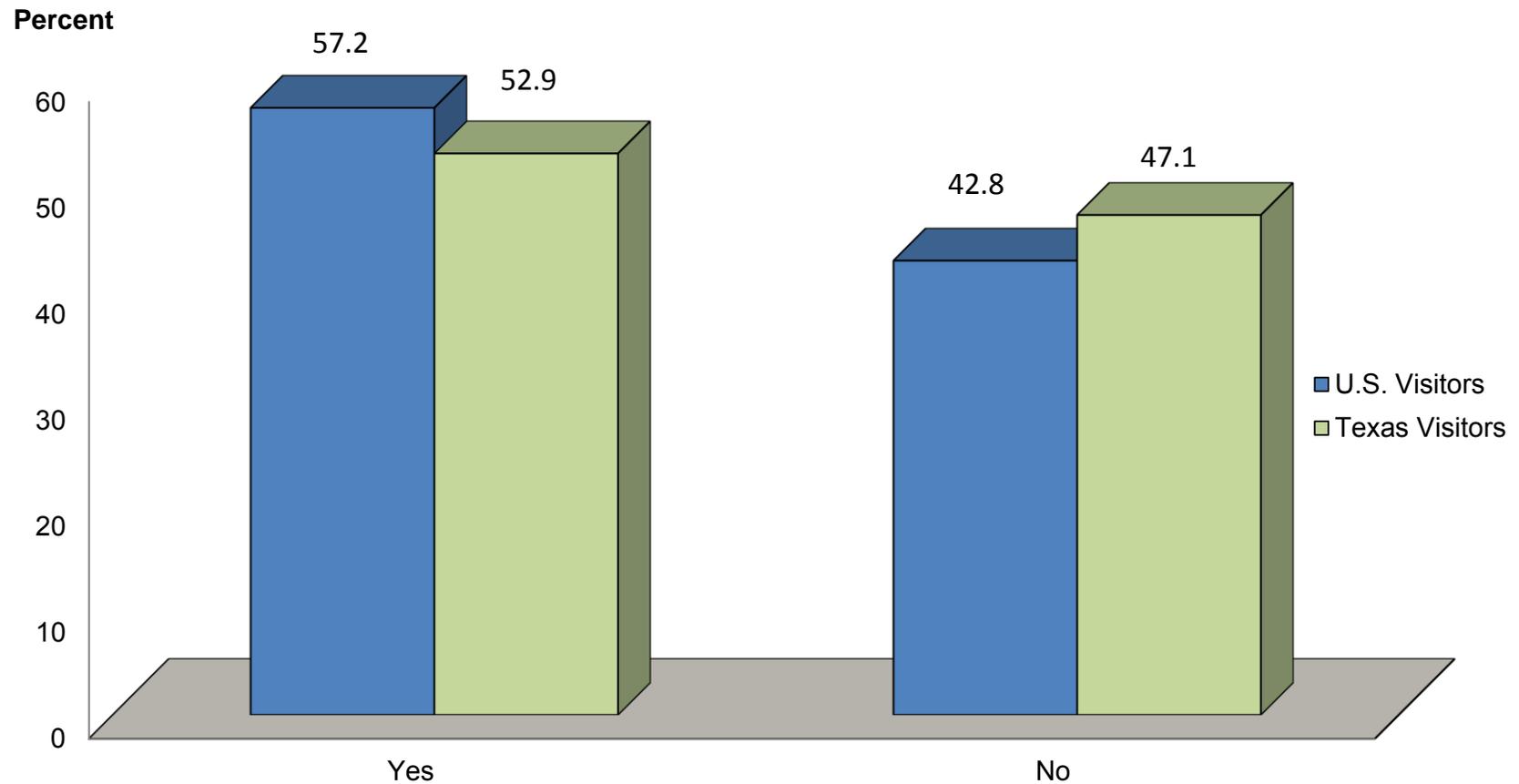
Table: Trip Expenditures and Itemized Expenditures (continued)

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Itemized Trip Expenditures (\$)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
Mean Accommodations/Lodging in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$665	\$1,359	\$400	\$797	\$251	\$927	\$566	\$1,129	\$1,017	\$691	\$339
Per Visitor / Trip	\$519	\$954	\$304	\$614	\$179	\$718	\$391	\$931	\$688	\$534	\$232
Mean Additional Air Transportation in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$71	\$333	\$142	\$126	\$119	\$253	\$165	\$154	\$265	\$94	\$47
Per Visitor / Trip	\$55	\$233	\$108	\$97	\$85	\$196	\$114	\$127	\$179	\$73	\$32
Mean Entertainment and Recreation in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$238	\$488	\$348	\$217	\$186	\$316	\$343	\$131	\$380	\$235	\$322
Per Visitor / Trip	\$186	\$343	\$265	\$167	\$133	\$245	\$237	\$108	\$257	\$182	\$220
Mean Food and Beverages in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$326	\$626	\$301	\$562	\$293	\$434	\$547	\$462	\$474	\$466	\$444
Per Visitor / Trip	\$255	\$440	\$229	\$433	\$209	\$336	\$378	\$381	\$321	\$360	\$304
Mean Ground Transportation in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$76	\$516	\$97	\$201	\$83	\$330	\$139	\$175	\$143	\$107	\$73
Per Visitor / Trip	\$59	\$362	\$73	\$155	\$59	\$255	\$96	\$144	\$97	\$82	\$50
Mean Shopping, Gifts, and Other Purchases in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$287	\$891	\$641	\$717	\$609	\$1,541	\$792	\$585	\$735	\$653	\$344
Per Visitor / Trip	\$224	\$625	\$488	\$552	\$435	\$1,192	\$547	\$483	\$497	\$504	\$235
Mean Medical Services in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$11	\$0	\$3	\$4	\$0	\$7	\$4	\$1	\$5	\$5	\$6
Per Visitor / Trip	\$9	\$0	\$2	\$3	\$0	\$5	\$3	\$1	\$3	\$4	\$4
Mean Other Spending in the U.S.											
(Number of Respondents)	63*	49*	48*	142	129	101	542	499	284	540	164
Per Travel Party / Trip	\$58	\$105	\$68	\$116	\$80	\$35	\$151	\$152	\$46	\$139	\$72
Per Visitor / Trip	\$45	\$74	\$52	\$89	\$57	\$27	\$104	\$125	\$31	\$108	\$49

* Denotes small sample.



TRAVEL INSURANCE PURCHASED OVERSEAS VISITORS TO TEXAS / U.S. 2014



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2014



TRAVEL INSURANCE PURCHASED OVERSEAS VISITORS TO TEXAS 2014

- Over half (53%) of the overseas visitors to Texas purchased travel insurance for their trip in 2013, up from 49% in 2013. By comparison, Texas visitors are slightly less likely to purchase travel insurance than the average overseas visitor to the U.S. (57%).
- Travelers from Australia were by far the most likely to purchase travel insurance - nearly 87%, on par with 87% in 2013. By comparison, French travelers were by far the least likely to purchase travel insurance (27%, down from 31% in 2013). The following countries had a majority of visitors that purchased travel insurance in 2014: the UK, Brazil, China, India, Australia, Italy, and Taiwan.

Table: Travel Insurance

	2014 All Overseas	13-14 UK	13-14 Germany	12-14 France	12-14 Nether- lands	12-14 Brazil	13-14 Japan	12-14 China	12-14 South Korea	12-14 India	12-14 Australia
Was travel insurance purchased for this trip? (%)											
ESTIMATED TRAVELERS	1,549,000	171,000	110,000	55,000	52,000	68,000	57,000	101,000	28,000	121,000	79,000
(Number of Respondents)	1,861	489	300	151	183	222	328	87*	61*	373	206
Yes	52.9%	54.4%	40.1%	26.9%	47.2%	66.3%	47.7%	69.1%	40.3%	80.9%	86.9%
No	47.1%	45.6%	59.9%	73.1%	52.8%	33.7%	52.3%	30.9%	59.7%	19.1%	13.1%

* Denotes small sample.

	12-14 Italy to TX	12-14 Taiwan to TX	12-14 Colombia to TX	12-14 Nordic to TX	12-14 C America to TX	12-14 M East to TX	2014 Overseas Leis. TX	2014 Overseas Biz/CV TX	2014 Overseas POE Dallas	2014 Overseas POE Houston	13-14 UK Leis. TX
Was travel insurance purchased for this trip? (%)											
ESTIMATED TRAVELERS	28,000	12,000	31,000	59,000	93,000	92,000	984,000	618,000	604,000	873,000	121,000
(Number of Respondents)	95*	85*	80*	247	259	226	1,084	836	615	1,060	340
Yes	56.5%	76.5%	31.5%	32.3%	24.8%	41.7%	52.9%	52.3%	62.8%	47.7%	64.7%
No	43.5%	23.5%	68.5%	67.7%	75.2%	58.3%	47.1%	47.7%	37.2%	52.3%	35.3%

* Denotes small sample.