

U.S. Outbound Tourism Market Research



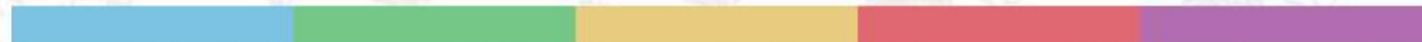
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U.S. Outbound Tourism Market Overview

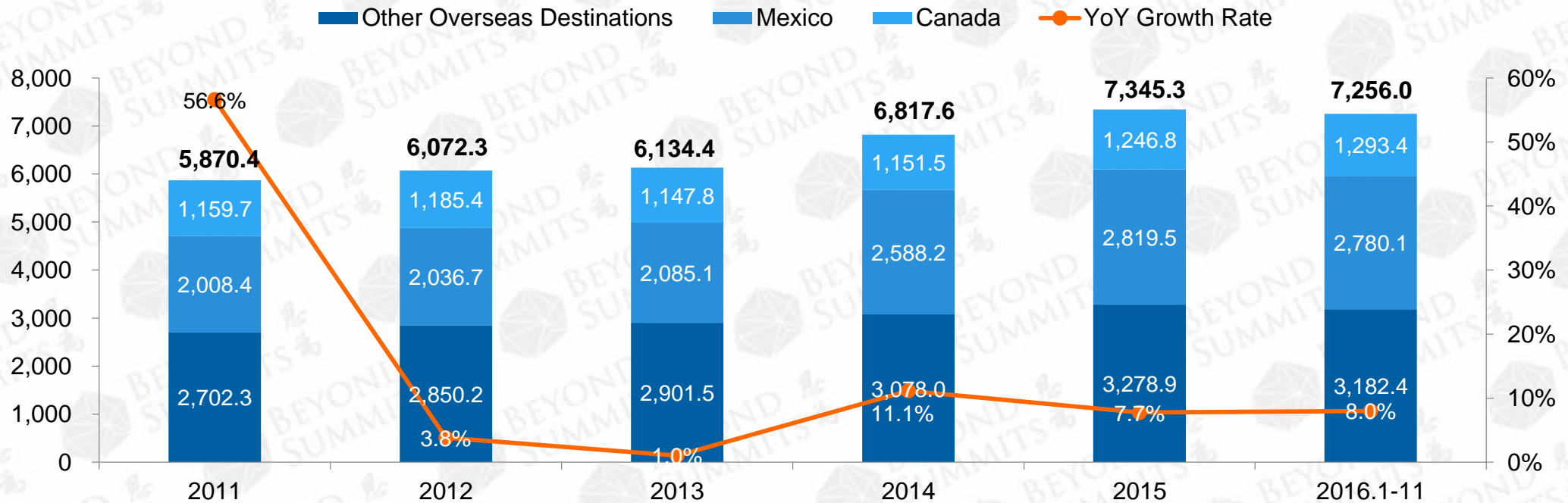
- U.S continued to see a slow economic recovery in 2016. The economy was not likely to have a strong rebound due to inflation, uncertain fiscal policy, unbalanced economic structure, etc.
- Despite the negative factors mentioned above, U.S. outbound tourism remained a sustained growth, with the number of U.S. outbound tourists reaching 72.56 million from Jan. – Nov. 2016, up by 8% from the same period last year.
- Among all global destinations, Canada and Mexico were the most favored ones chosen by over half of the U.S. outbound travelers. Other popular overseas destinations mainly scatter around European and Caribbean areas, like UK, Dominica, France, etc.
- The boom of digital media has encouraged more U.S. tourists to review travel website like TripAdvisor when planning for the next trip overseas.

The Number of U.S. Outbound Tourists & Destinations

The Number of U.S. Outbound Tourists

During 2011 – 2016, the number of U.S. outbound tourists was on the rise year by year, reaching 72.56 million from Jan. – Nov. 2016, which was up by 8% from the same period last year.

The Number of U.S. Outbound Tourists 2011-2016 (10,000 Persons)

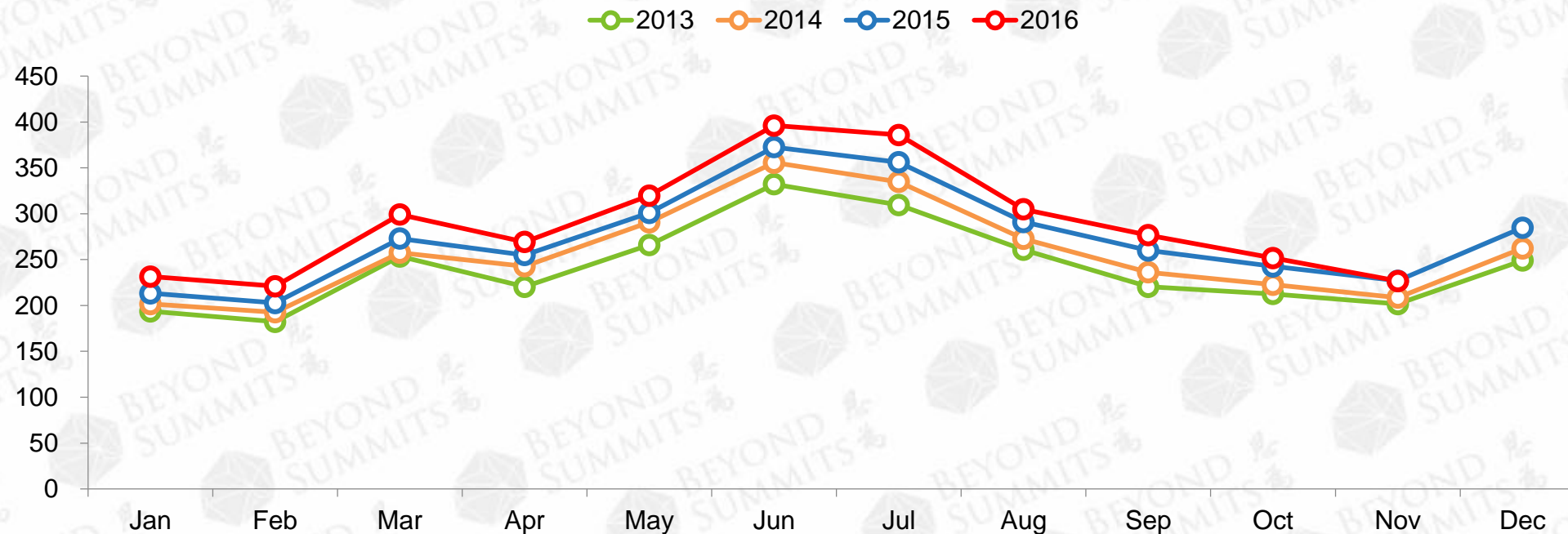


Data Source : US National Travel and Tourism Office

The Number of U.S. Tourists to Overseas Destinations

From 2013 to 2016, the number of U.S. tourists to overseas destinations (excluding Mexico and Canada) fluctuated periodically. The peak time was June and July as the summer holiday for U.S. students lasted from June to August. The next peak time was in November, when the Christmas season approached.

The Number of U.S. Outbound Tourists Per Month 2013-2016 (10 Thousand People)



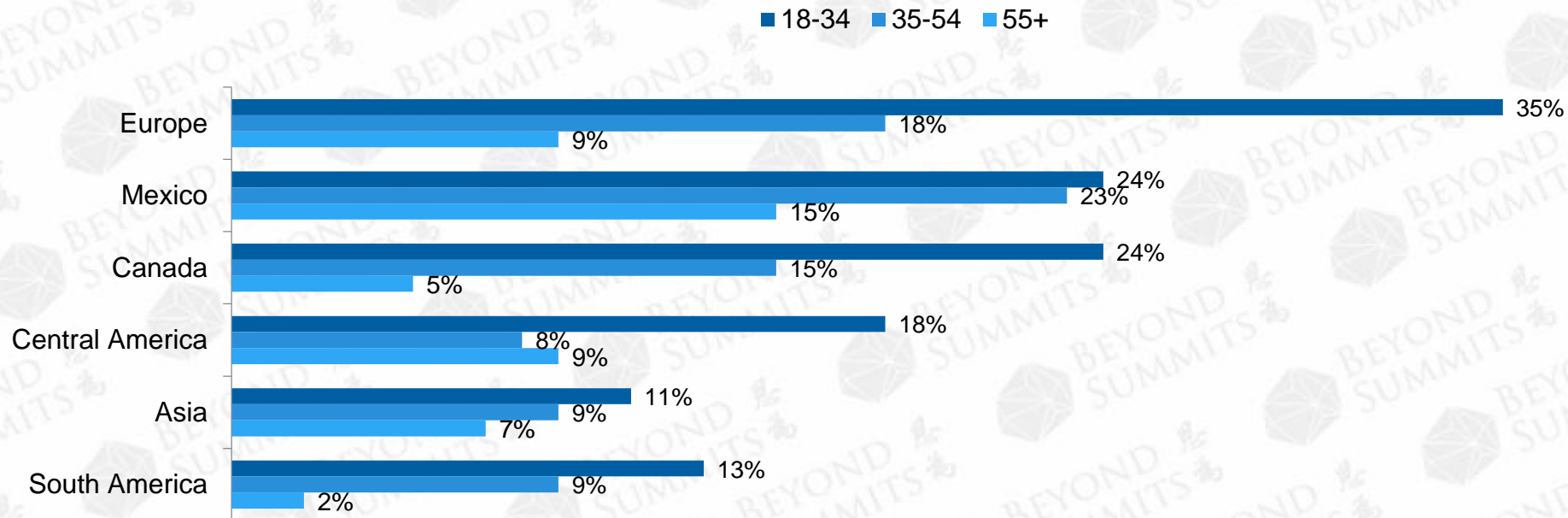
Data Source : US National Travel and Tourism Office

Note: Excluding data of U.S. tourists to Mexico and Canada

U.S. Outbound Travel Destinations

Data from a research in 2015 showed, European destinations appealed to the majority of U.S. travelers, particularly for tourists aged 18-34. However, U.S. tourists aged 35-54 showed more interests in Mexico than in other destinations, accounting for 23% of the overall group.

The Appeal of Overseas Destinations to U.S. Travelers by Age 2015

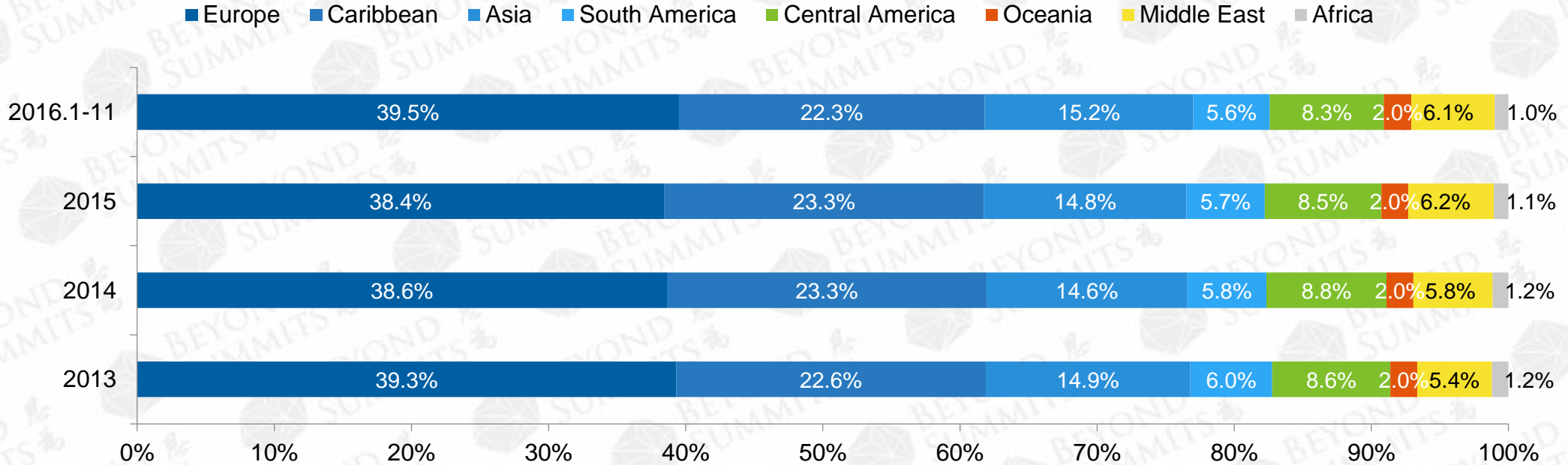


Data Source : Phocuswright's Good Travels: The Philanthropic Profile of the American Traveler

U.S. Outbound Travel Destinations

From 2013 to 2016, the most popular overseas destinations (excluding Mexico and Canada) for U.S. travelers were mainly located in European and Caribbean area. The tourists to these two areas accounted for over half of all the US outbound tourists. It should be noted that preference for South American destinations saw a gradual drop, and Asian destinations ranked the third at 15%.

U.S. Outbound Travel Destinations Distribution 2013-2016

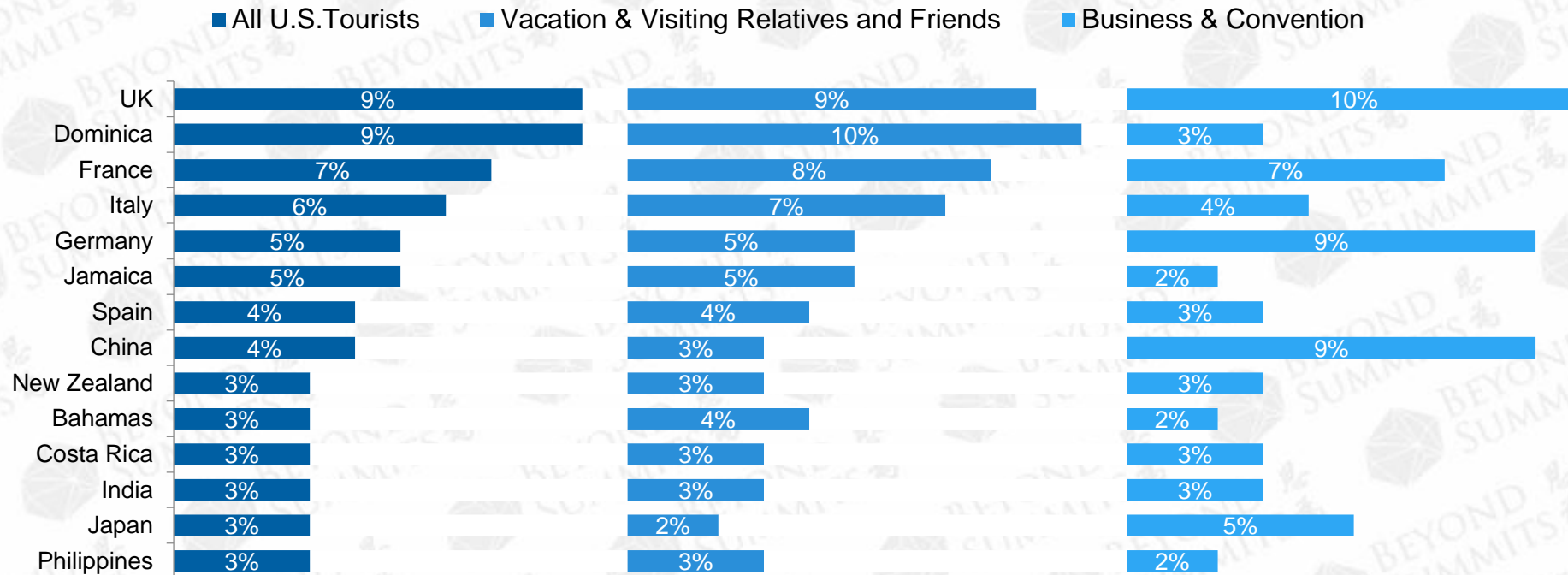


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

U.S. Outbound Travel Destinations

In 2015, among all the overseas destinations (except Mexico and Canada) which U.S. tourists traveled to, UK and Dominica shared the 1st place with a 9% share respectively. However, when it came to business travel, the top 4 countries were UK, Germany, China and France with 10%, 9%, 9% and 7% respectively.

U.S. Outbound Travel Destinations Distribution 2015



Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

U.S. Outbound Travel Destinations

U.S. Outbound Travel Destinations Distribution 2015

	All U.S. Tourists	Vacation & Visiting Relatives and Friends	Business & Convention
Europe	35%	35%	39%
UK	9%	9%	10%
France	7%	8%	7%
Italy	6%	7%	4%
Germany	5%	5%	9%
Spain	4%	4%	3%
New Zealand	3%	3%	3%
Ireland	2%	3%	1%
Switzerland	2%	2%	2%
Austria	1%	1%	2%
Caribbean area	24%	27%	12%
Dominica	9%	10%	3%
Jamaica	5%	5%	2%
Bahamas	3%	4%	2%
Aruba	2%	2%	1%
South America	7%	7%	8%
Columbia	2%	2%	3%
Peru	2%	2%	1%

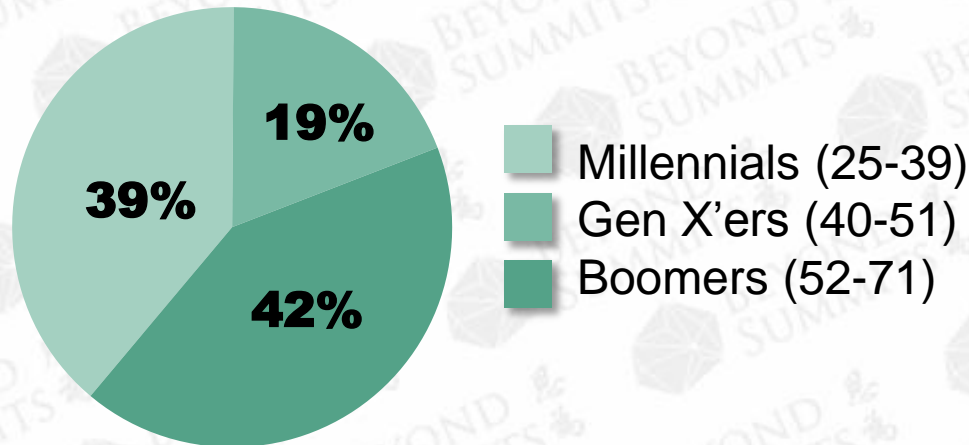
	All U.S. Tourists	Vacation & Visiting Relatives and Friends	Business & Convention
Central America	8%	8%	7%
Costa Rica	3%	3%	3%
Africa	3%	3%	4%
Middle East	6%	5%	6%
Israel	2%	1%	1%
Asia	19%	17%	28%
China	4%	3%	9%
India	3%	3%	3%
Japan	3%	2%	5%
Philippines	3%	3%	2%
Hong Kong	2%	1%	4%
Taiwan	2%	2%	3%
South Korea	2%	1%	3%
Oceania	2%	2%	2%
Australia	2%	1%	2%

Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

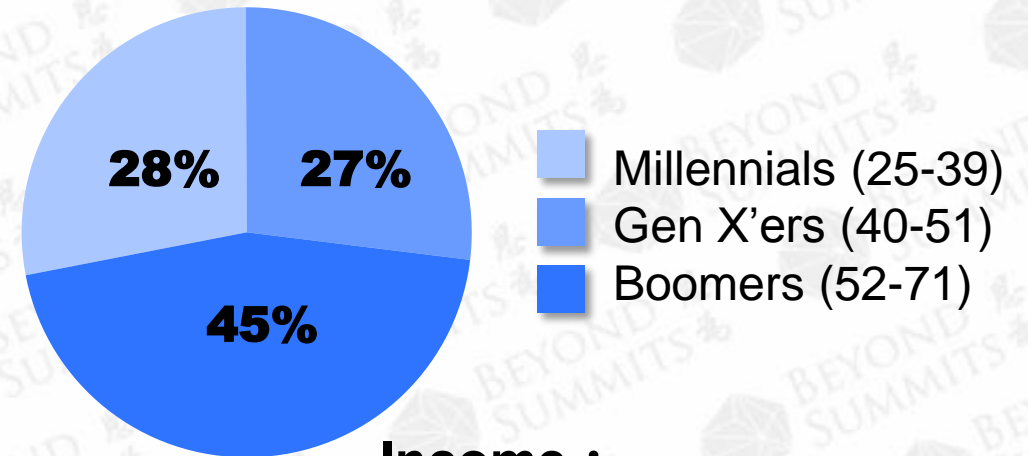
U.S. Outbound Tourists Profiles & Travel Behaviors

U.S. Outbound Tourists Overview

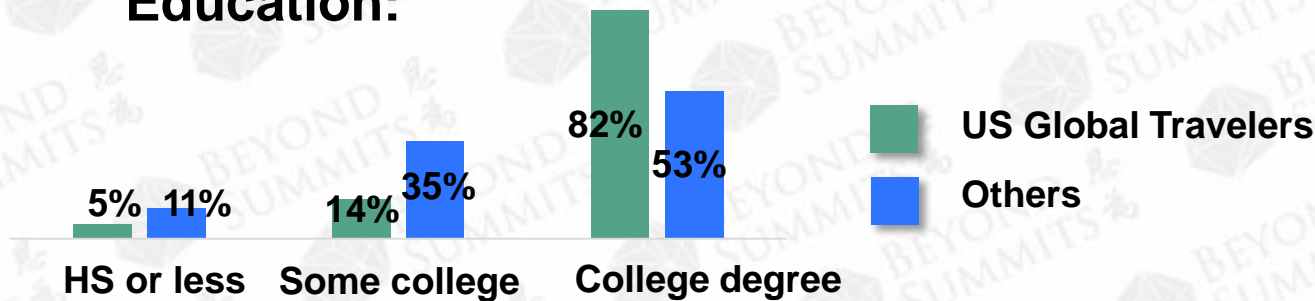
Age: US Global Travelers
Visited 4+ countries in past 10 years



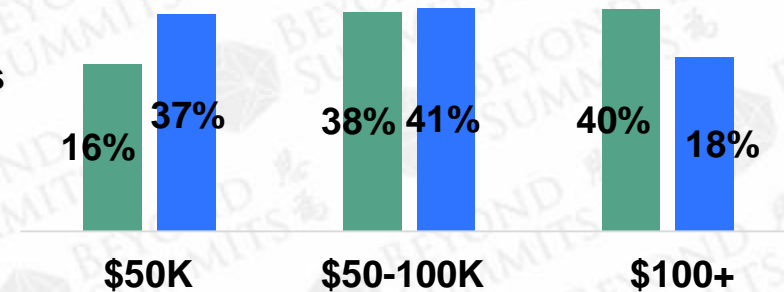
Age: Others
Visited 0-3 countries in past 10 years



Education:



Income :

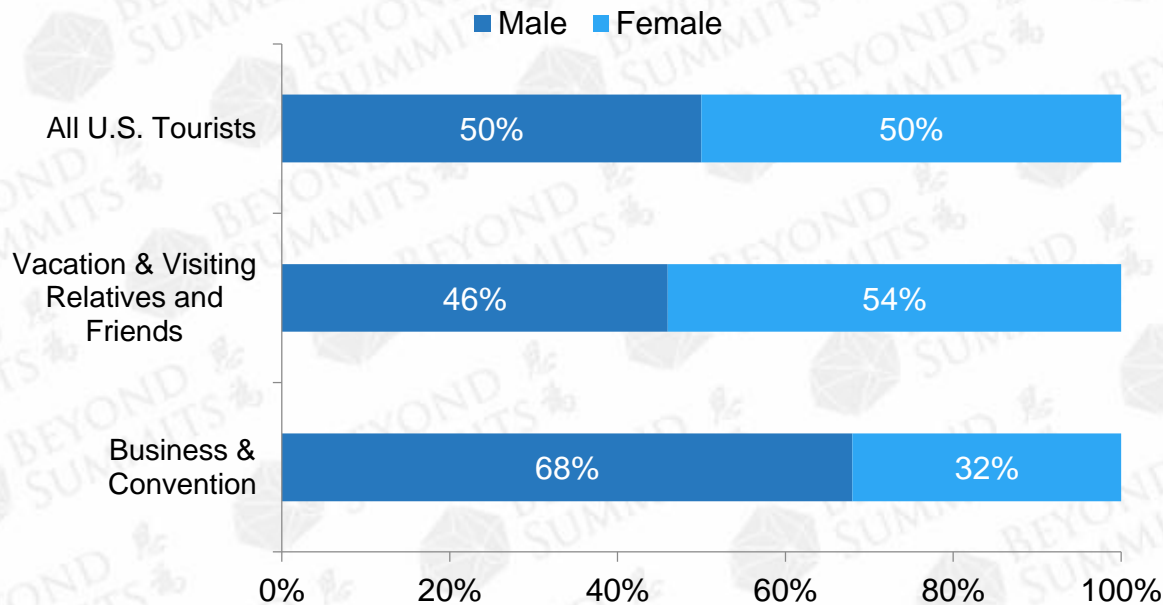


Data Source : ASTA + PSB's 2017 "How America Travels" National Study

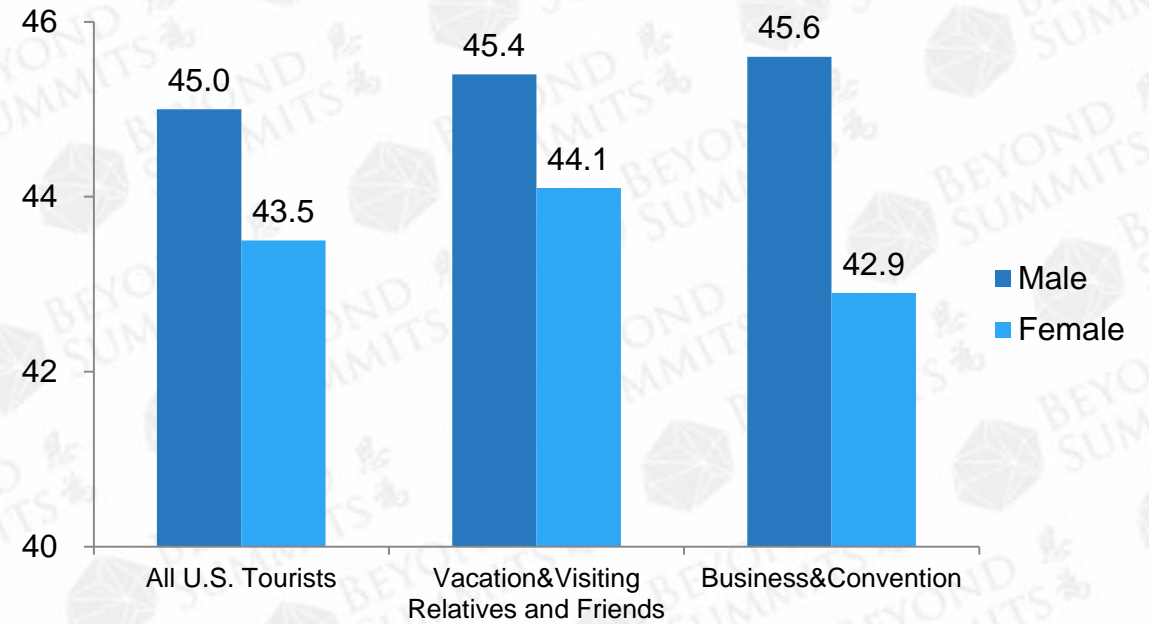
Gender and Age of U.S. Outbound Tourists

- In 2015, among all the U.S. tourists to overseas destinations, the number of males was almost equal to that of females. But it should be noted that, male travelers were much more than female travelers when the travel purpose was to attend meetings or for business. Females were more likely to travel for visiting relatives or for vacations.
- Generally, U.S. male outbound travelers were older than female travelers, with an average age of 40-50.

Gender of U.S. Outbound Tourists 2015



Average Age of U.S. Outbound Tourists 2015

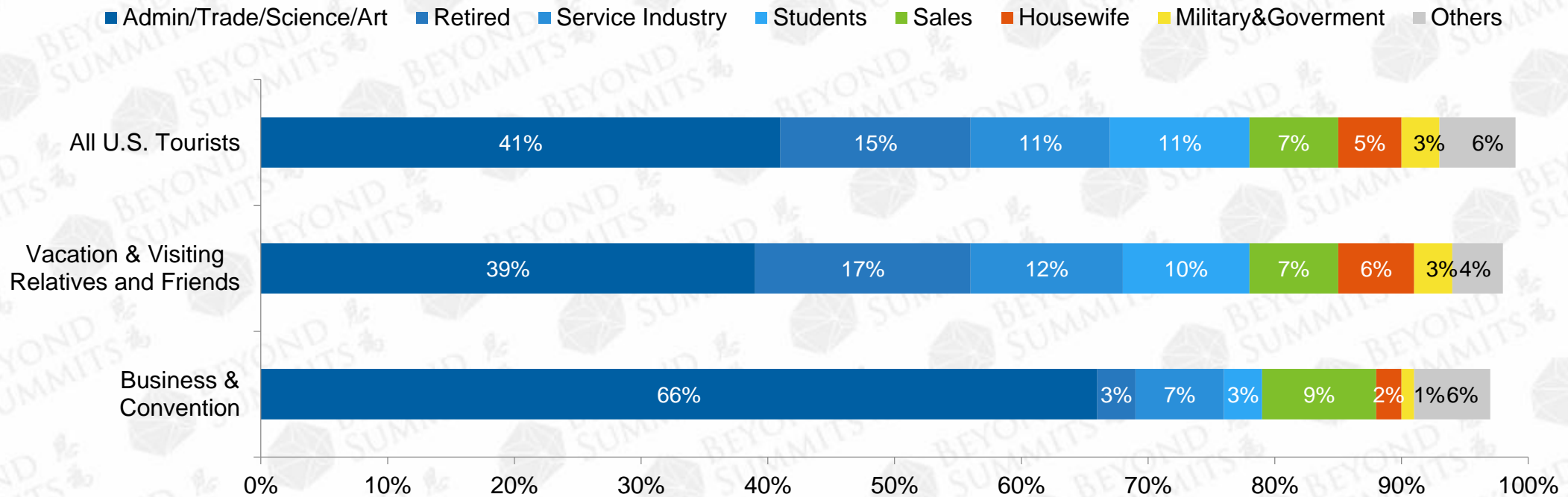


Data Source : US National Travel and Tourism Office Note: not include data of U.S. tourists to Mexico and Canada

Occupations of U.S. Outbound Tourists

In 2015, 41% of the U.S. outbound tourists were engaged in work related to administration, trade, science and art; among those who traveled for business and meetings, the proportion was even higher reaching 66%.

Occupations of U.S. Outbound Tourists 2015

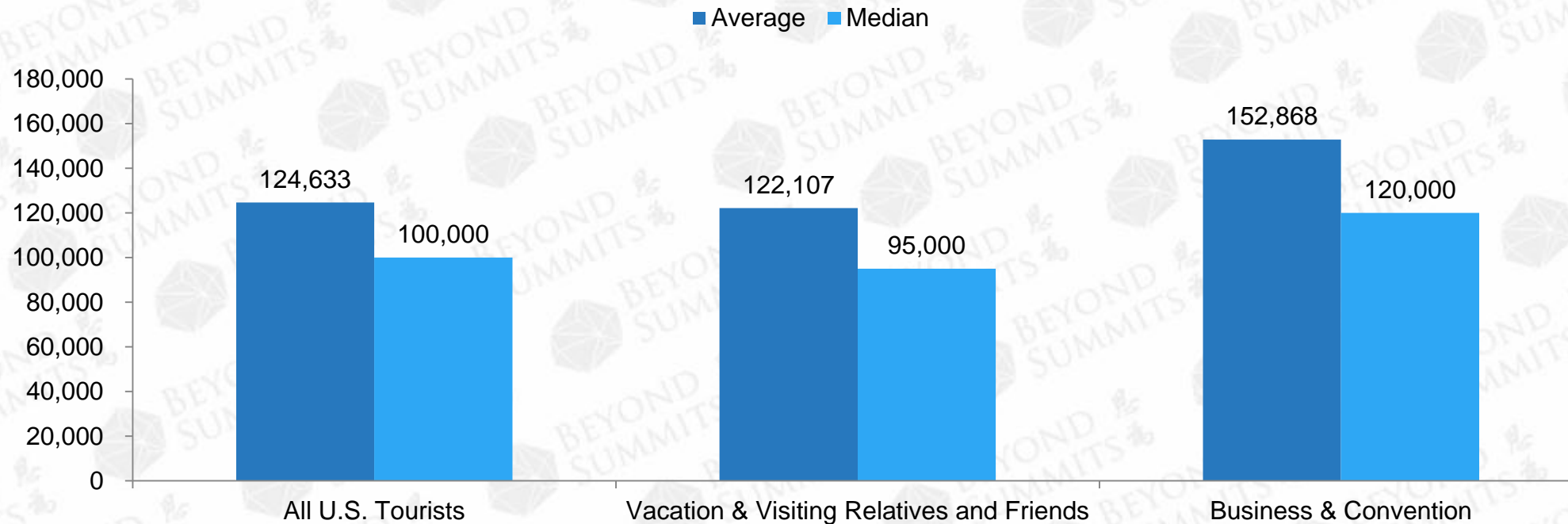


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

Household Income of U.S. Outbound Tourists

In 2015, the average household income of U.S. outbound tourists reached \$124,633 per year; travelers that went abroad for business and meetings had an annual household income of \$152,868.

Average Annual Household Income of U.S. Outbound Tourists 2015 (US dollars)

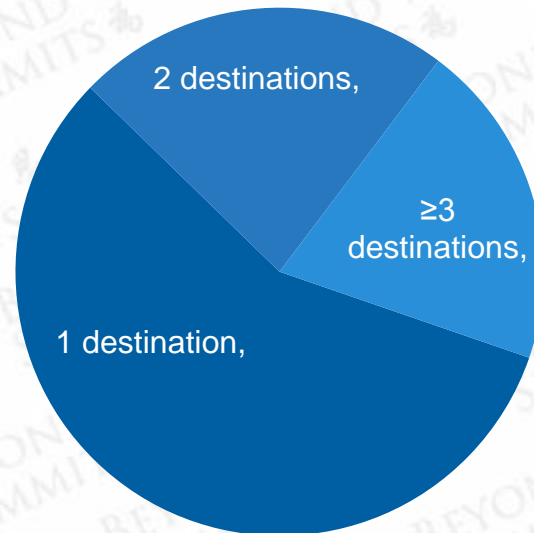


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

The Number of Overseas Destinations Visited by U.S. Tourists

In 2015, U.S. outbound tourists mainly traveled to 1 destination overseas, accounting for 57% of the total; 23% of all the U.S. outbound travelers visited 2 destinations.

The Number of Overseas Destinations Visited by U.S. Tourists 2015

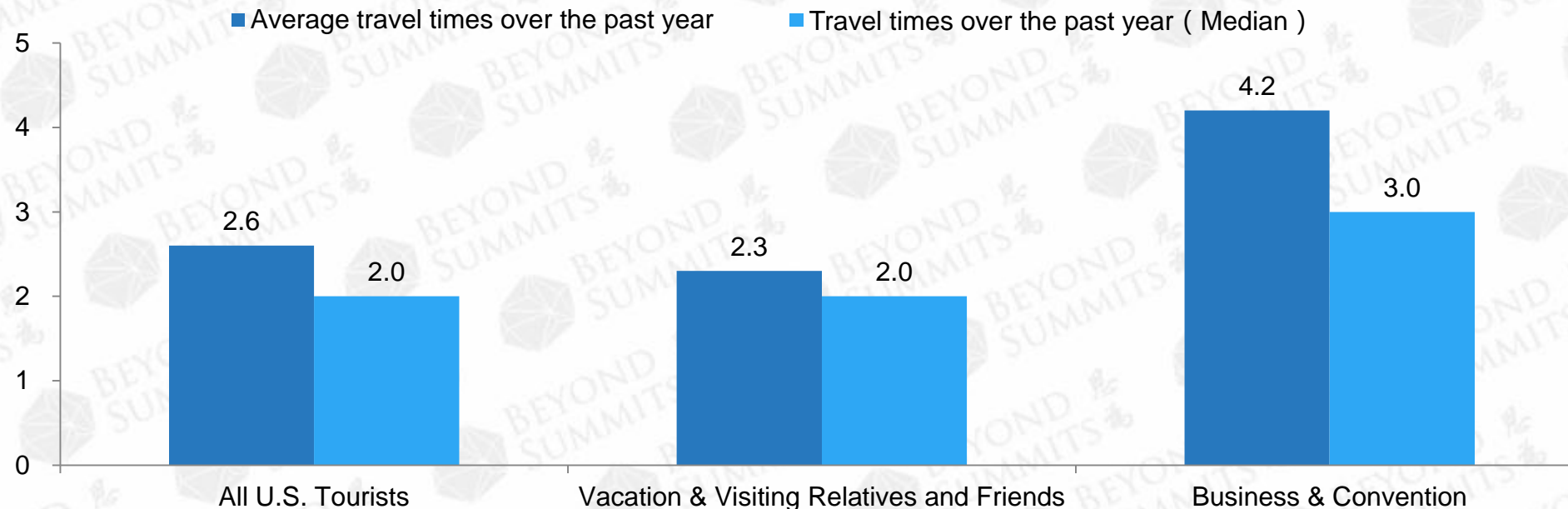


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

Travel Frequency for U.S. Outbound Tourists

In 2015, many U.S. global travelers preferred to have more than one trip each year; the average travel frequency was 2.6 times with 2 times as the median. The frequency was proved to be higher among business travelers and meeting participants.

Travel Frequency for U.S. Outbound Tourists 2015

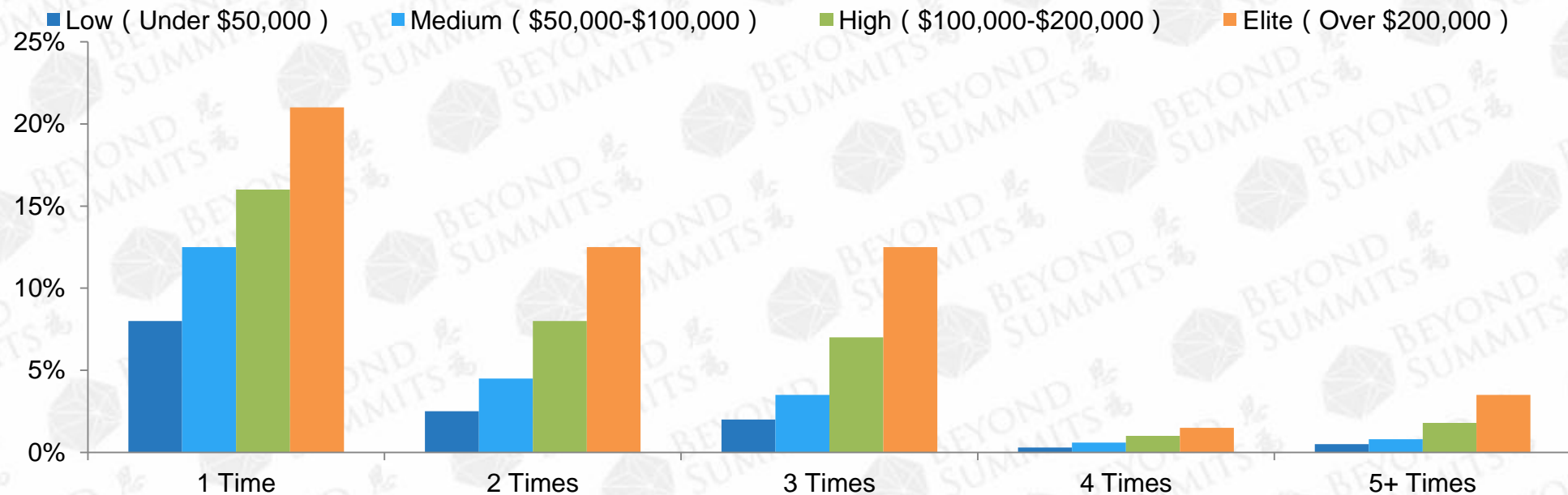


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

Income VS Travel Frequency

According to the research based on the data of the past 3 years, U.S. travelers with higher income had higher frequency of outbound traveling.

Travel Frequency of U.S. Outbound Tourists with Different Level of Income Over the Past 3 Years

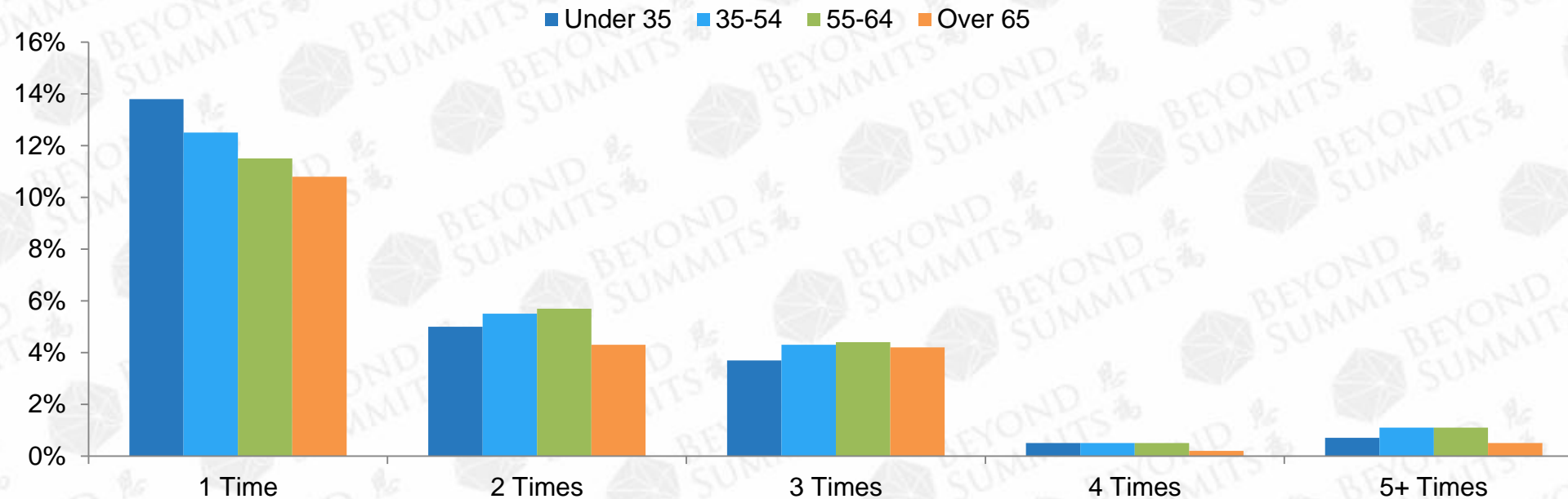


Data Source : 2016 IXI Economic Cohorts / GfK MRI (2015 Doublebase Survey of the American Consumer)

Age VS Travel Frequency

Over the past three years, among U.S. travelers of different age groups, middle-age travelers have been the major group for overseas trips.

Travel Frequency of US Outbound Tourists by Age over the Past 3 Years



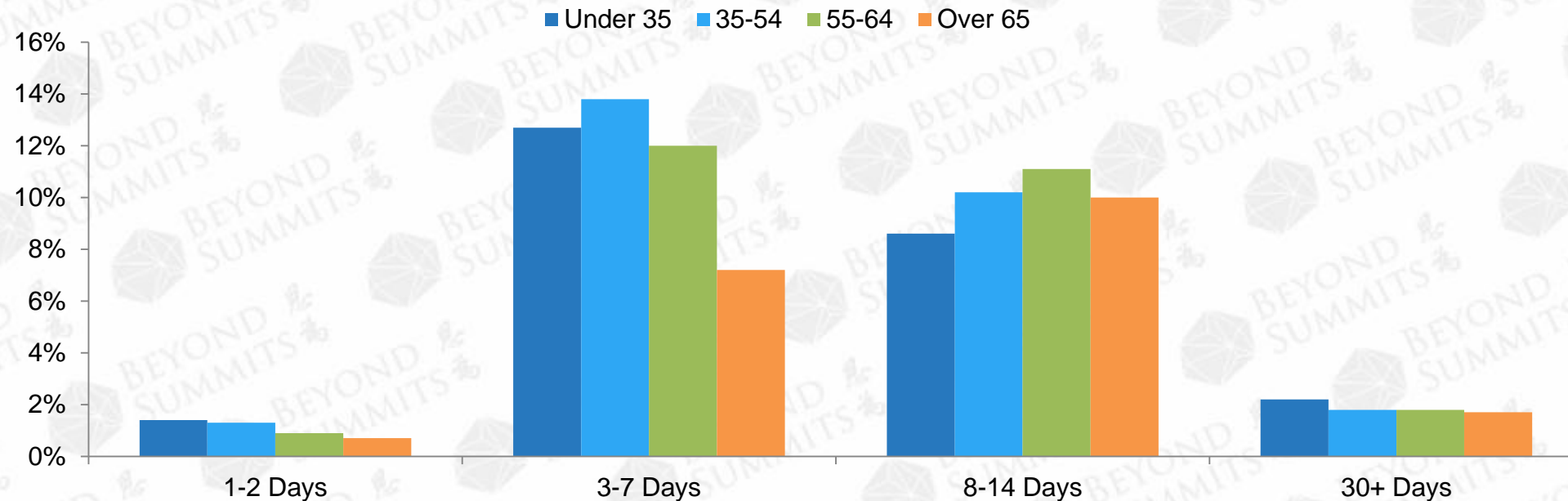
Data Source : 2016 IXI Economic Cohorts / GfK MRI (2015 Doublebase Survey of the American Consumer)



Age VS Travel Duration

Over the past three years, travelers of all age groups were more willing to stay for 3-7 days in overseas destinations. Yet for tourists aged over 65, they would like to have an 8-14 days trip overseas.

Travel Duration of US Outbound Tourists by Age over the Past 3 Years

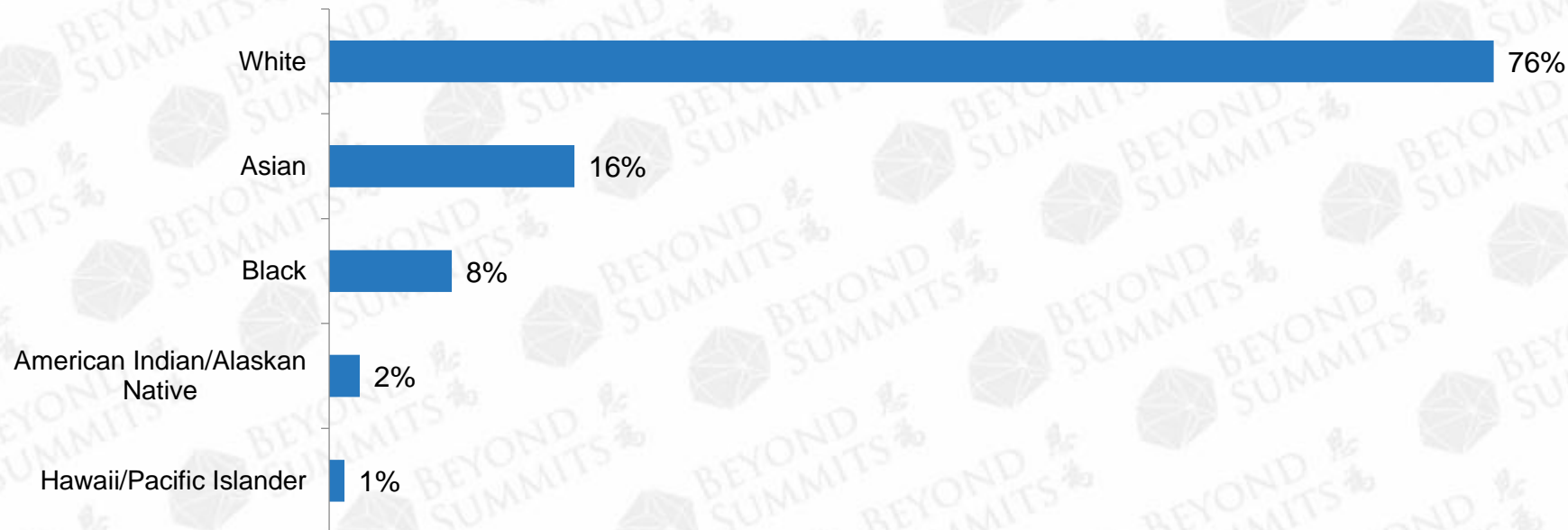


Data Source : 2016 IXI Economic Cohorts / GfK MRI (2015 Doublebase Survey of the American Consumer)

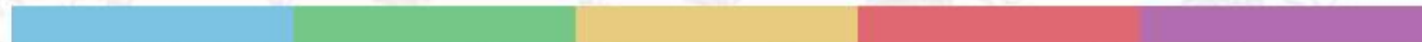
Races of U.S. Outbound Tourists

In 2015, 76% of all U.S. outbound travelers were white Americans, constituting the largest share of the total.

Races of U.S. Outbound Tourists 2015



Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada



Source Areas of U.S. Outbound Tourists

In 2015, U.S. outbound tourists mainly lived around Mid-Atlantic, South Atlantic and Pacific areas, such as New York, Florida, Texas, etc.

Source Areas of U.S. Outbound Tourists 2015

Region/State/City	Share of All Tourists
New England	7%
Massachusetts	4%
Boston	2%
Middle Atlantic	20%
New York	10%
New York City	8%
New Jersey	5%
Pennsylvania	5%
Philadelphia	3%
East North Central	10%
Michigan	3%
Detroit	2%
Illinois	3%
Chicago	2%
Ohio	2%
West North Central	4%
Minnesota	2%
East South Central	3%
South Atlantic	23%
Florida	8%

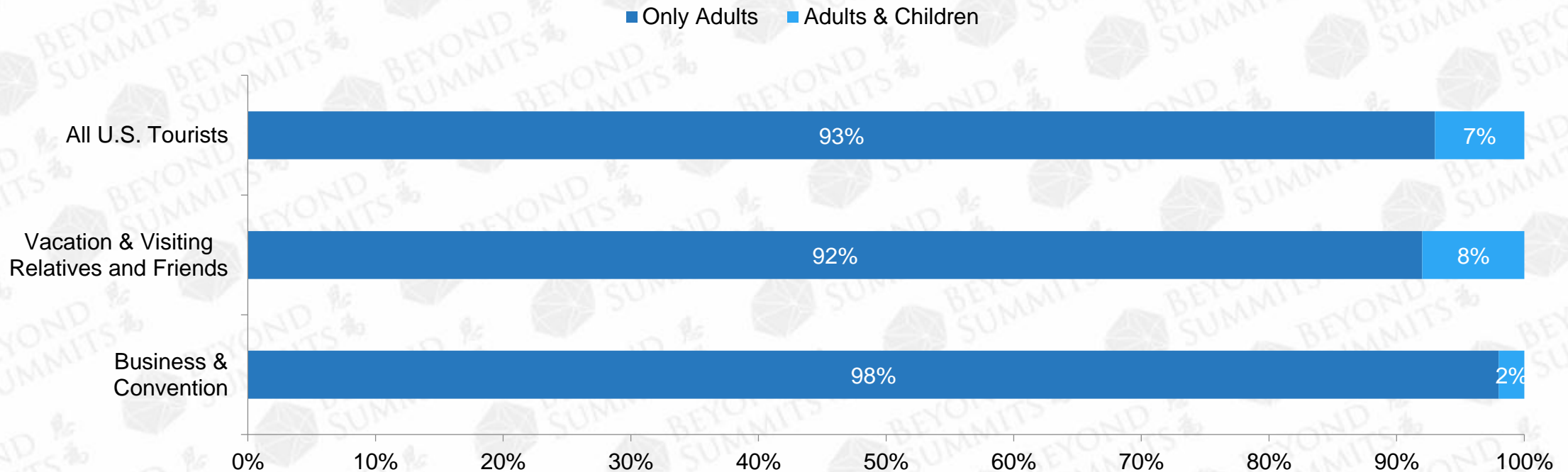
Region/State/City	Share of All Tourists
Miami	2%
Ft. Lauderdale	2%
Virginia	3%
Georgia	3%
Atlanta	3%
North Carolina	3%
Maryland	3%
D.C. Metro Area	3%
East South Central	3%
West South Central	12%
Texas	9%
Houston	3%
Dallas	3%
Mountain	5%
Colorado	2%
Pacific	15%
California	11%
Los Angeles	3%
Washington	2%
Seattle	2%

Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

U.S. Outbound Travel – Only Adults VS Adults with Children

In 2015, among all U.S. outbound tourists, 93% of them are adults traveling alone without children; for those who traveled abroad for business or meetings, they were even less likely to take a child in an overseas trip. It also showed that not so many U.S. tourists preferred to have a family travel in overseas destinations.

U.S. Outbound Travel – Only Adults VS Adults + Children 2015



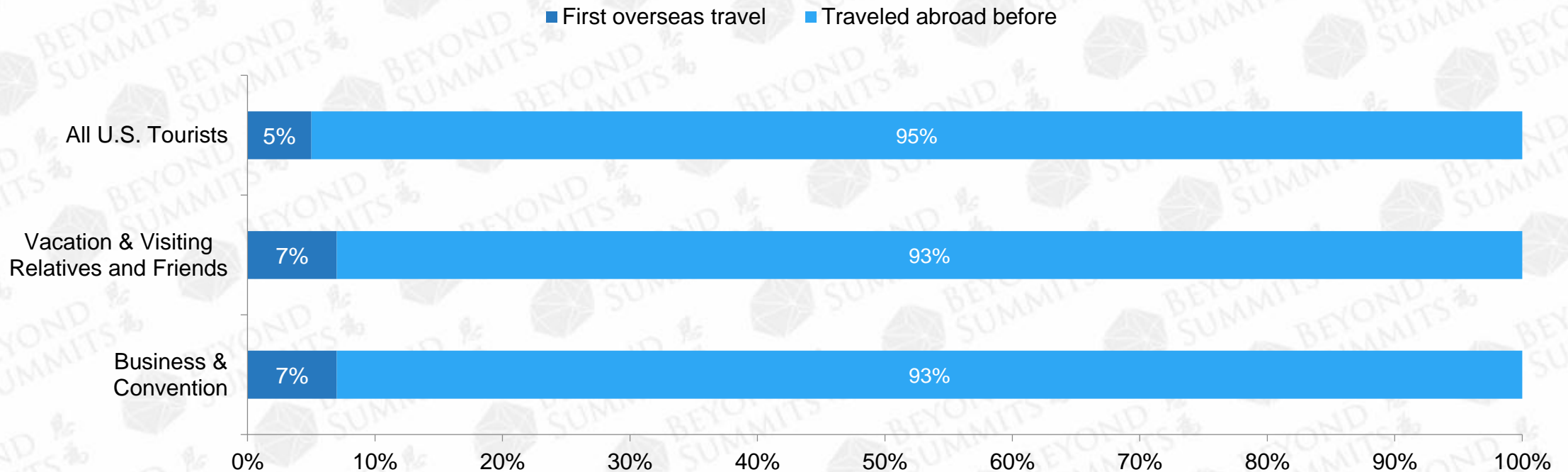
Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada



First Outbound Travel Experience for U.S. Tourists

In 2015, only 5% of all U.S. outbound tourists traveled abroad for the first time, as most of them traveled abroad before.

Outbound Travel Experience of U.S. Tourists 2015

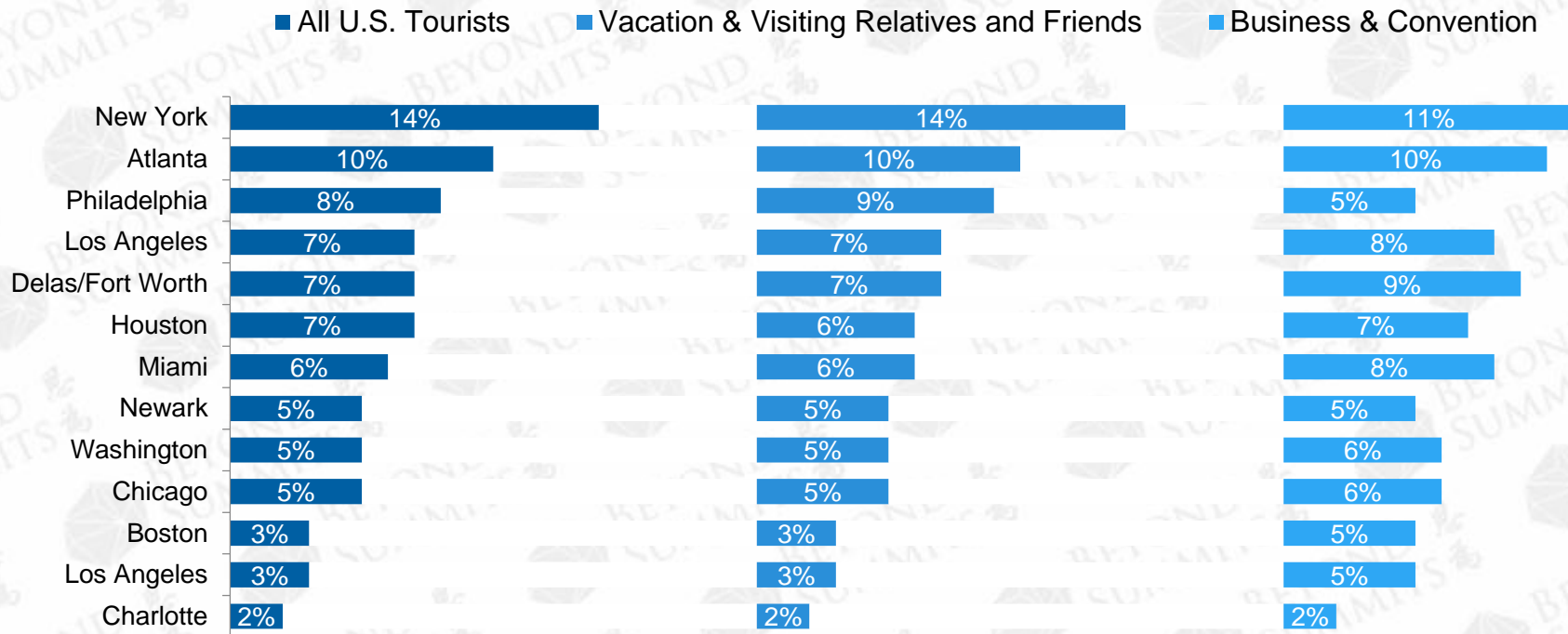


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

U.S. Outbound Travel Departure Ports

In 2015, U.S. outbound tourists mainly departed from large cities in U.S., such as New York topping the other ports at 14%. Next came Atlanta and Philadelphia, which accounted for 10% and 8% each.

Departure Ports of U.S. Outbound Travel 2015

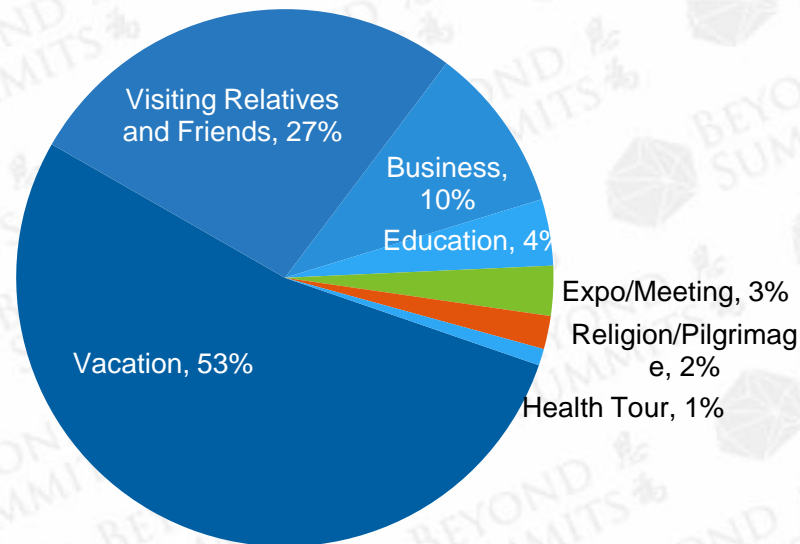


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

Travel Purposes of U.S. Outbound Tourists

In 2015, U.S. tourists traveled to overseas destinations mostly for vacations (53%), and the secondary purpose was to visit relatives and friends with a share of 27%.

Travel Purposes of U.S. Outbound Tourists 2015

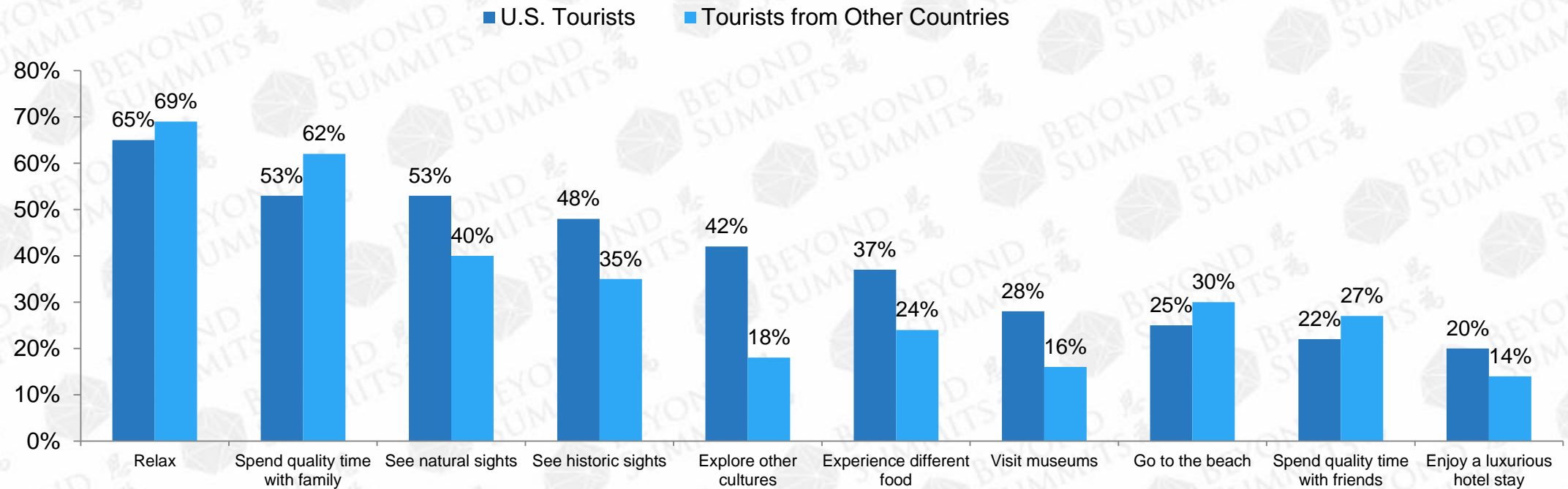


Data Source : US National Travel and Tourism Office Note: Excluding data of U.S. tourists to Mexico and Canada

Travel Reasons for U.S. Outbound Tourists

Americans would love to travel abroad to get relaxed, spend happy time with families, go sight seeing, etc.

Top 10 Most Important Reasons for Outbound Travel

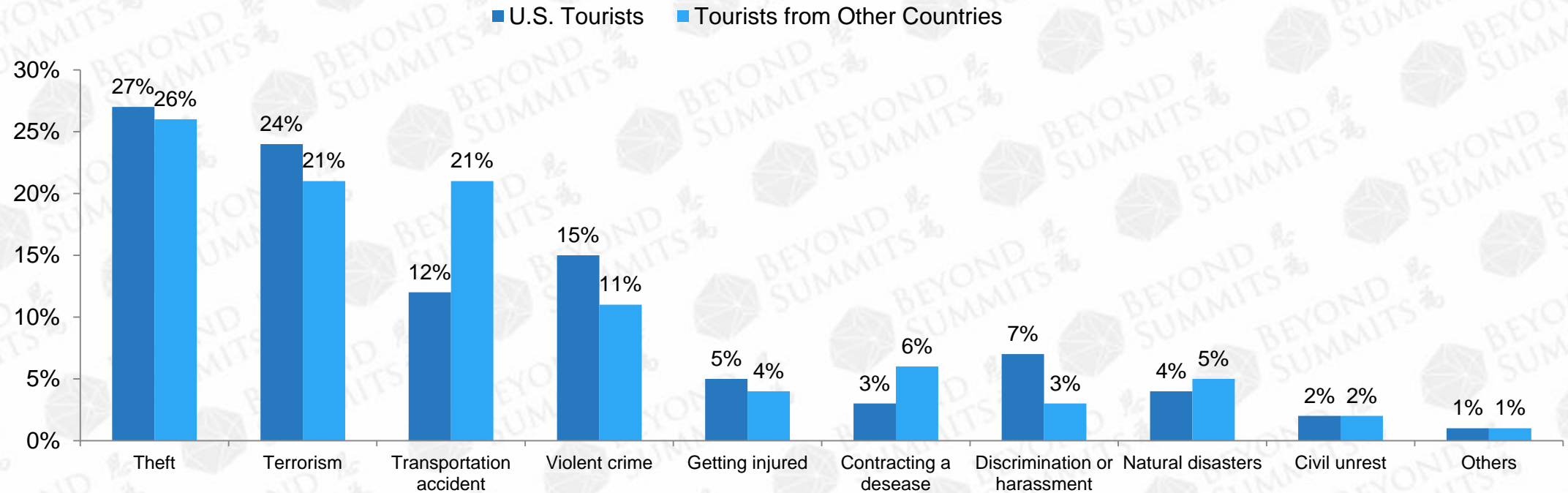


Data Source : ASTA + PSB's 2017 "How America Travels" National Study

U.S. Outbound Tourists' Concerns

Compared to travelers from other countries, US outbound travelers were less concerned about transportation accidents, but significantly more concerned about theft and terrorism.

U.S. Outbound Tourists' Concerns

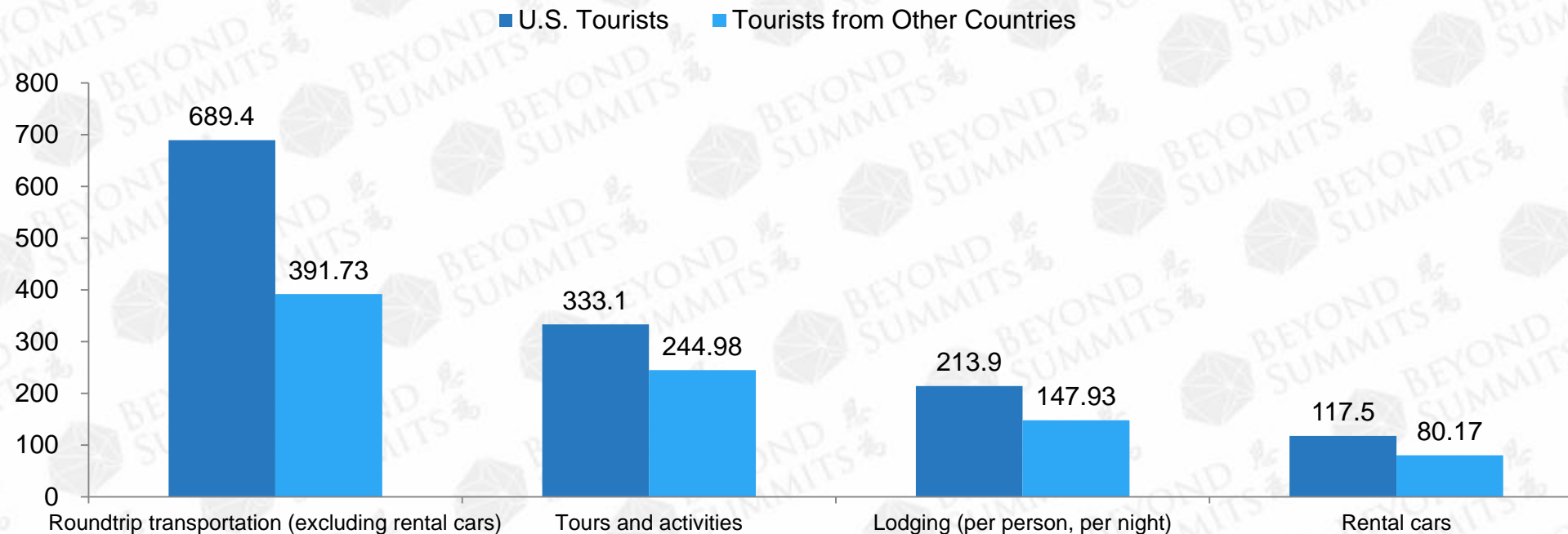


Data Source : ASTA + PSB's 2017 "How America Travels" National Study

U.S. Outbound Tourists' Travel Spend Per Trip

U.S. outbound tourists tended to spend more per trip comparing with tourists from other countries; roundtrip transportation fees, among all the travel expenses, occupied the largest share at \$689.4 per person.

U.S. Outbound Tourists' Average Spend Per Trip (US dollars)

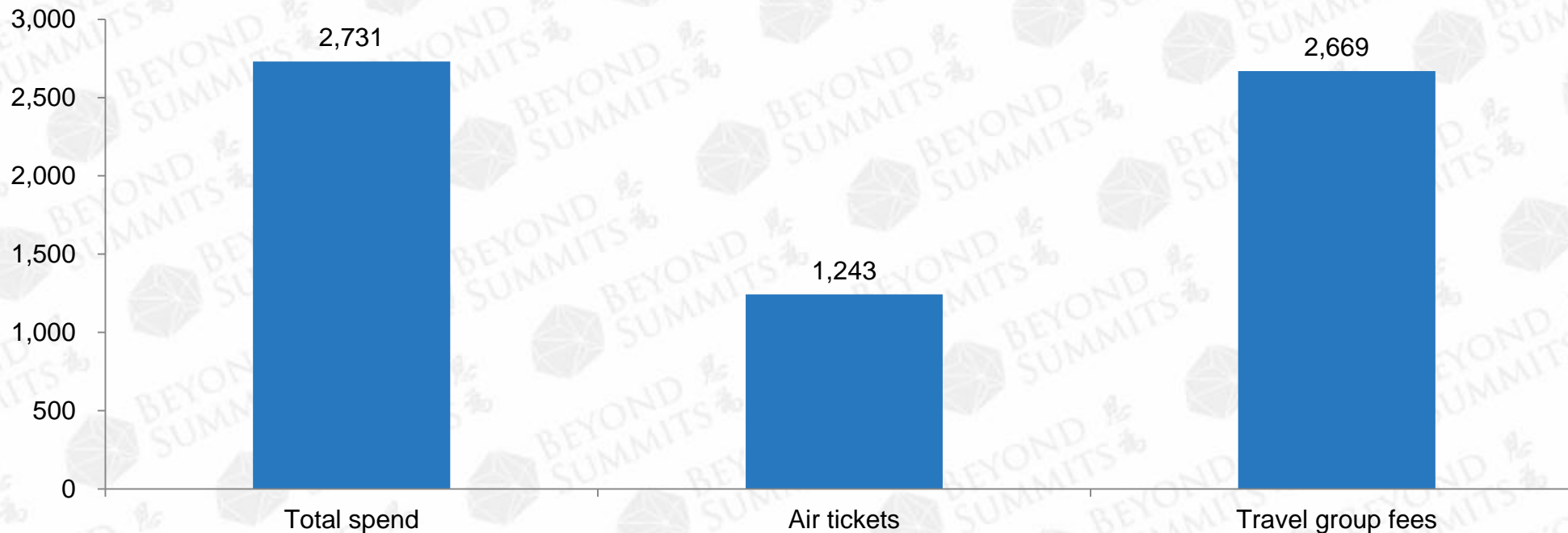


Data Source : ASTA + PSB's 2017 "How America Travels" National Study

U.S. Outbound Tourists' Average Spend Per Capita

In 2015, the total spend per U.S. outbound tourist reached up to \$2,731, among which air fare had a share of over 45% at \$1,243. Besides, tourists who joined travel groups usually spent less than individual travelers, with an average spend of \$2,669 per person.

U.S. Outbound Tourists' Average Spend Per Capita 2015 (US dollars)

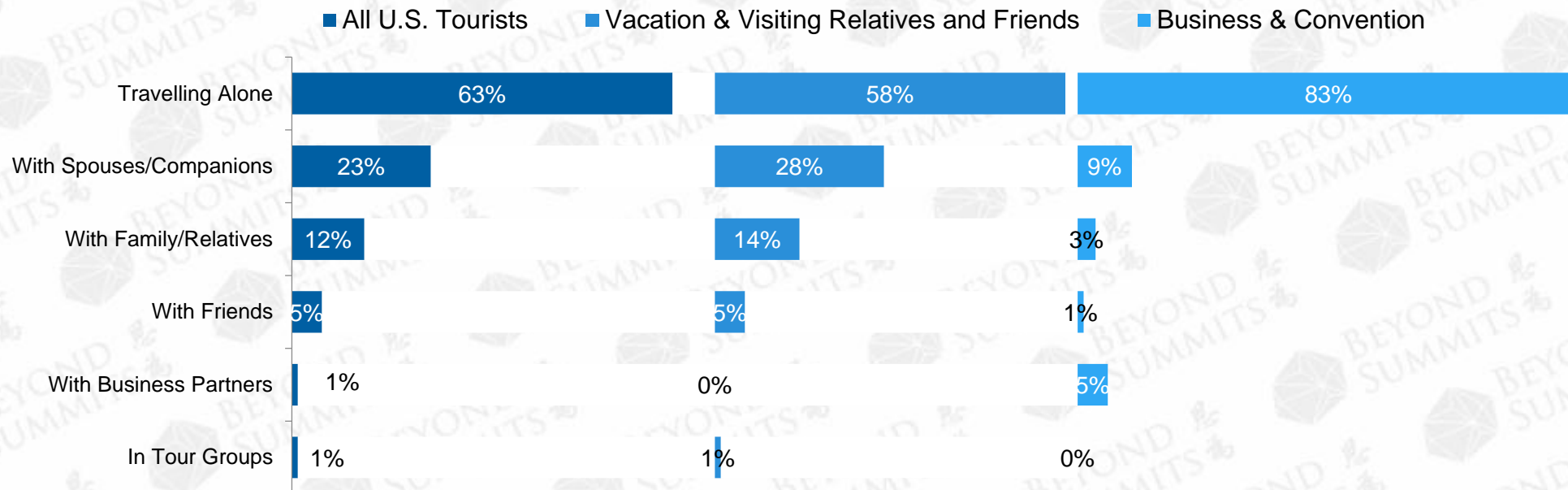


Data Source : US National Travel and Tourism Office Note: Excluding include data of U.S. tourists to Mexico and Canada

Travel Companions of U.S. Outbound Tourists

In 2015, most of U.S. outbound tourists traveled alone, accounting for 63%, followed by traveling with spouses or companions, accounting for 23%. Family travel only occupied a share of 12%.

**Travel Companions of U.S. Outbound Tourists
2015 (Multiple Choices)**

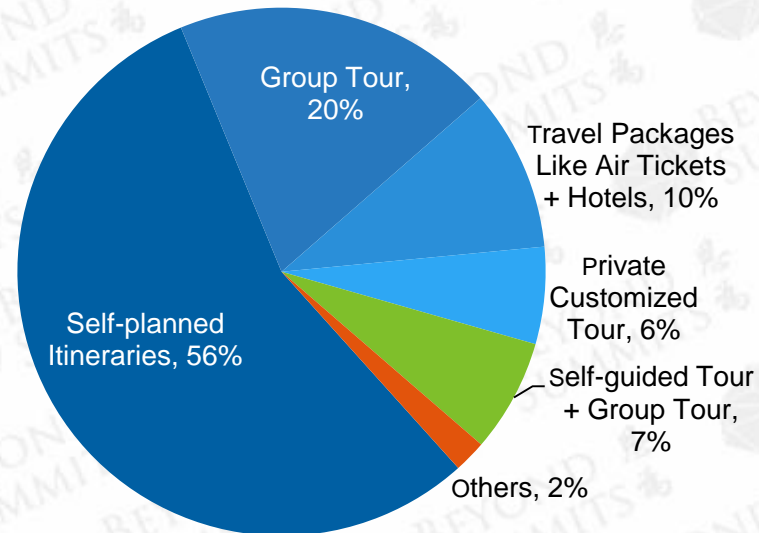


Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

Travel Modes of U.S. Outbound Tourists

In 2015, 56% of U.S. tourists customized the itineraries by themselves, while 20% chose group tours.

**Travel Modes of U.S. Outbound Tourists
2015**

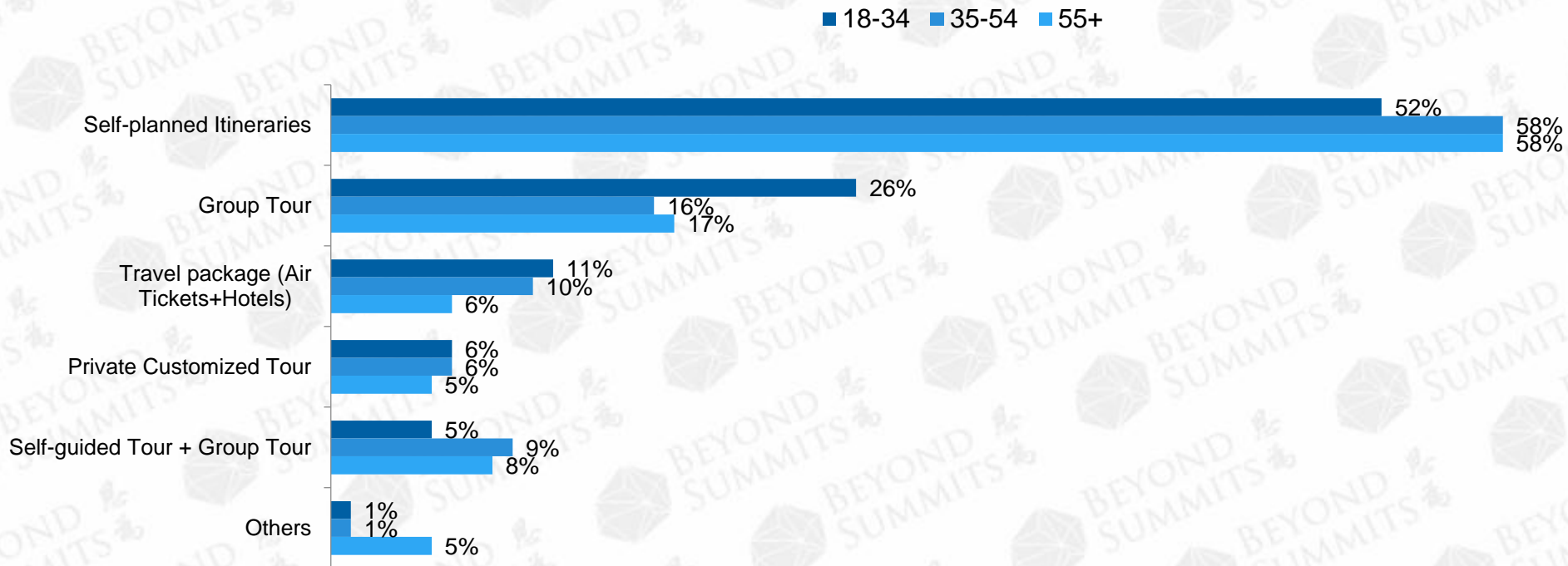


Data Source: Phocuswright's Good Travels: The Philanthropic Profile of the American Traveler

Travel Modes of U.S. Outbound Tourists

In general, U.S. tourists were more willing to choose self-guided tour. In 2015, U.S. tourists aged over 35 preferred to plan itineraries by themselves, while those aged 18-34 took the larger proportion in terms of choosing group tour.

Travel Modes of U.S. Outbound Tourists by Age 2015



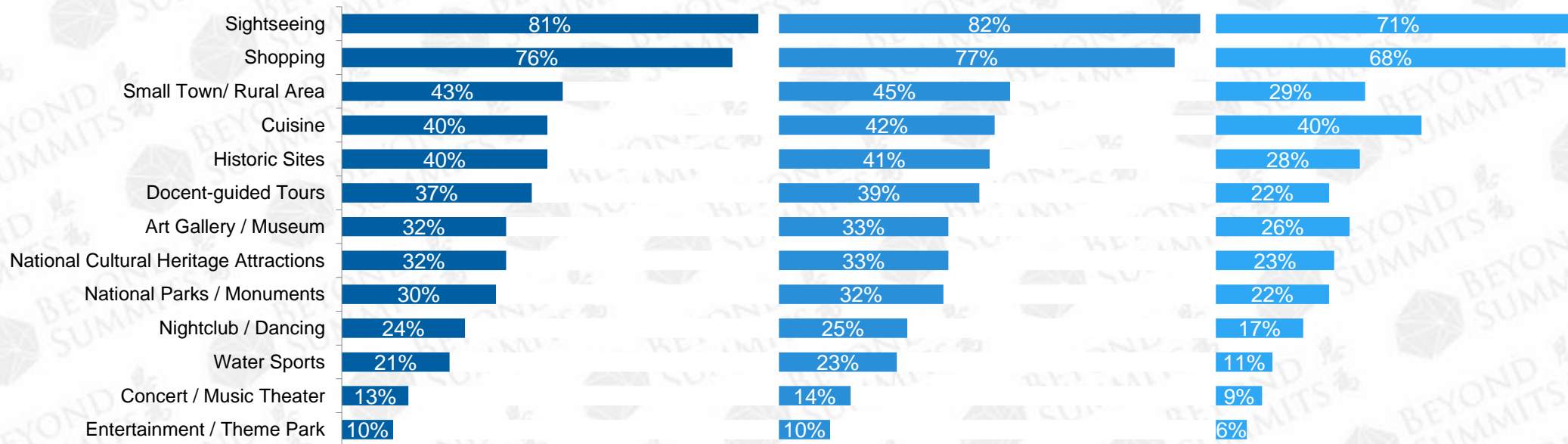
Data Source: Phocuswright's Good Travels: The Philanthropic Profile of the American Traveler

Leisure and Recreational Activities for U.S. Outbound Tourists

In 2015, for U.S. outbound tourists, sightseeing was still the most popular activity among all travel activities chosen by 81% of all U.S. tourists. In the second place and third place were shopping and activities in rural areas, accounting for 76% and 43% respectively. It also showed that U.S. tourists preferred sightseeing and rural travel.

Major Leisure & Recreational Activities for U.S. Outbound Tourists 2015

■ All U.S. Tourists ■ Vacation/ Visiting Relatives and Friends ■ Business & Convention



Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

The Sources of Travel Advice Trusted by U.S. Outbound Tourists

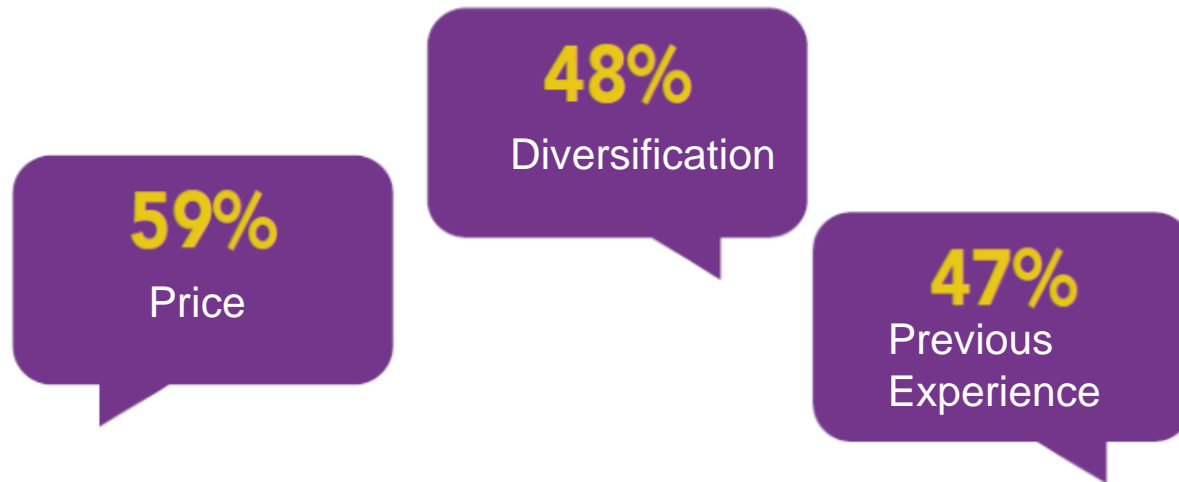
- A growing number of affluent travelers (annual household income over \$ 150,000) were inclined to get travel advice from strangers through travel review websites rather than from family members and friends.
- In addition, less affluent travelers sought advice from friends and families when searching for inspiring travel ideas. Only 37% of them thought that the advice from friends and families was influential, down by 11% over the last year.
- 41% of affluent travelers used travel review websites to search for information, up by 7% compared to 2014.
- 53% of affluent travelers trusted travel review websites more than institutes or organizations with AAA ratings or listed in Forbes.
- In terms of choosing destinations and travel suppliers, TripAdvisor took the lead and accounted for 87% of the total market share.



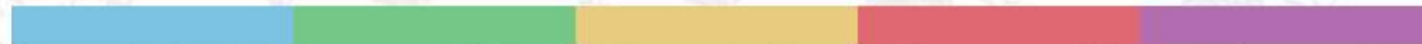
Data Source: American travelers' behavioral habit in 2015

U.S. Tourists' Considerations When Choosing Travel Suppliers

In 2015, the No.1 factor U.S. tourists considered was price when choosing travel suppliers of air tickets & hotels and travel agencies, accounting for 59%, followed by product diversification at 48%.



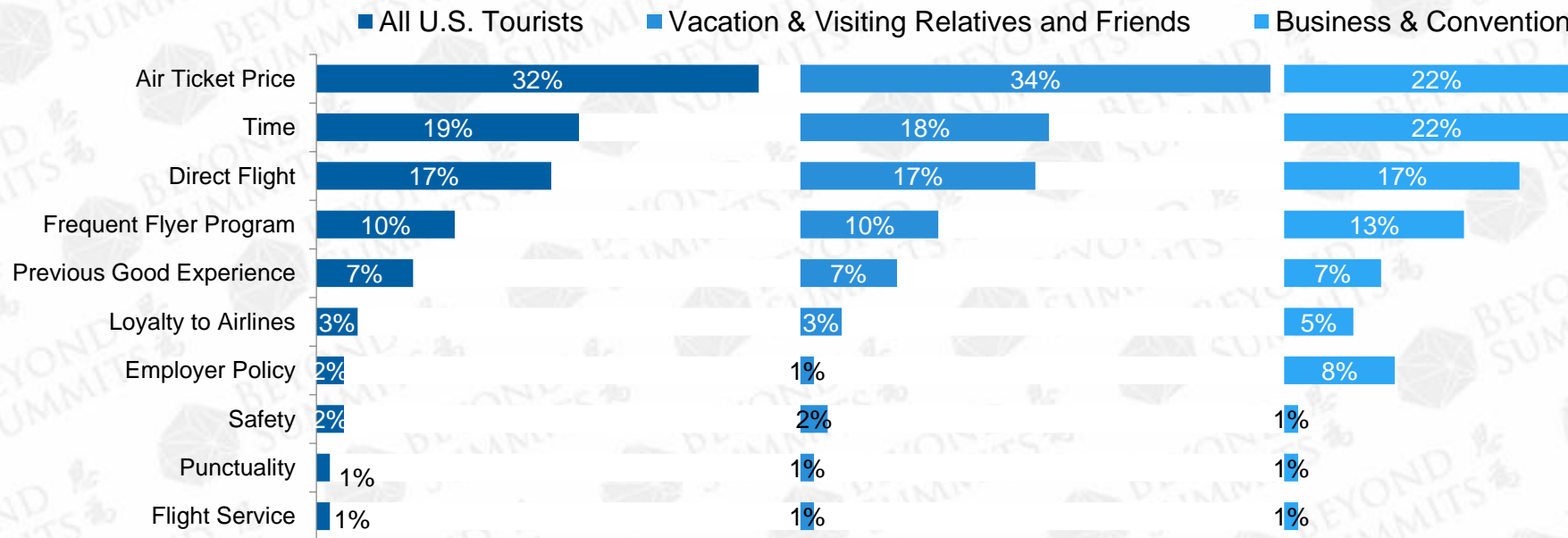
Data Source: Phocuswright's Good Travels: The Philanthropic Profile of the American Traveler



U.S. Outbound Tourists' Considerations When Choosing Flights

In 2015, the main factor U.S. tourists considered, when traveling to an overseas destination, was air ticket price, followed by the flight time. Of course, for tourists travelling abroad for business and conferences, the cost was a key factor as important as flight time. They also took direct or connecting flights into considerations, and 17% of U.S. outbound tourists regarded direct flights as a primary consideration.

U.S. Outbound Tourists' Considerations When Choosing Flights 2015

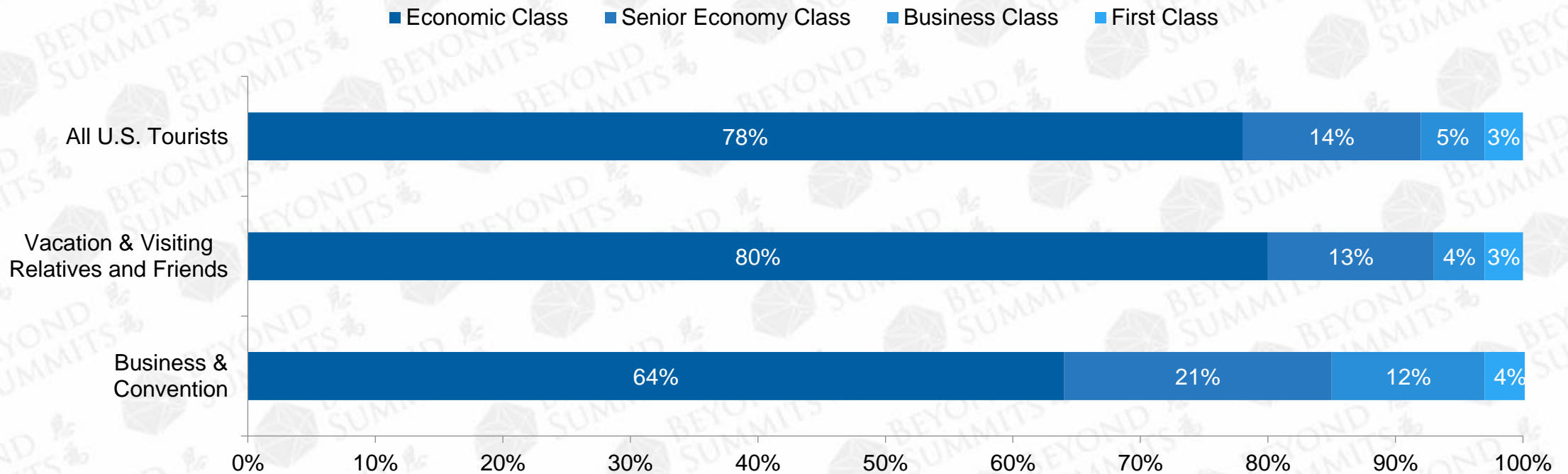


Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

Flight Class Selected by U.S. Outbound Tourists

In 2015, among all U.S. outbound tourists, 78% chose economic class, followed by 14% choosing senior economy class. Tourists traveling for business and conferences were more likely to select higher class flight seats than tourists traveling for vacations or visiting relatives/friends.

Flight Class Selected by U.S. Outbound Tourists 2015



Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

Accommodation Types of U.S. Outbound Tourists

In 2015, 63% of all U.S. outbound tourists were in favor of hotels to accommodate themselves. For business and MICE travelers, the proportion was even higher at 79%. Besides, 41% chose to stay in private houses. It was noteworthy that, on average, U.S. tourists stayed almost two times longer in private houses than in hotels, which proved that U.S. tourists would be keen on short-term house rental in recent years.

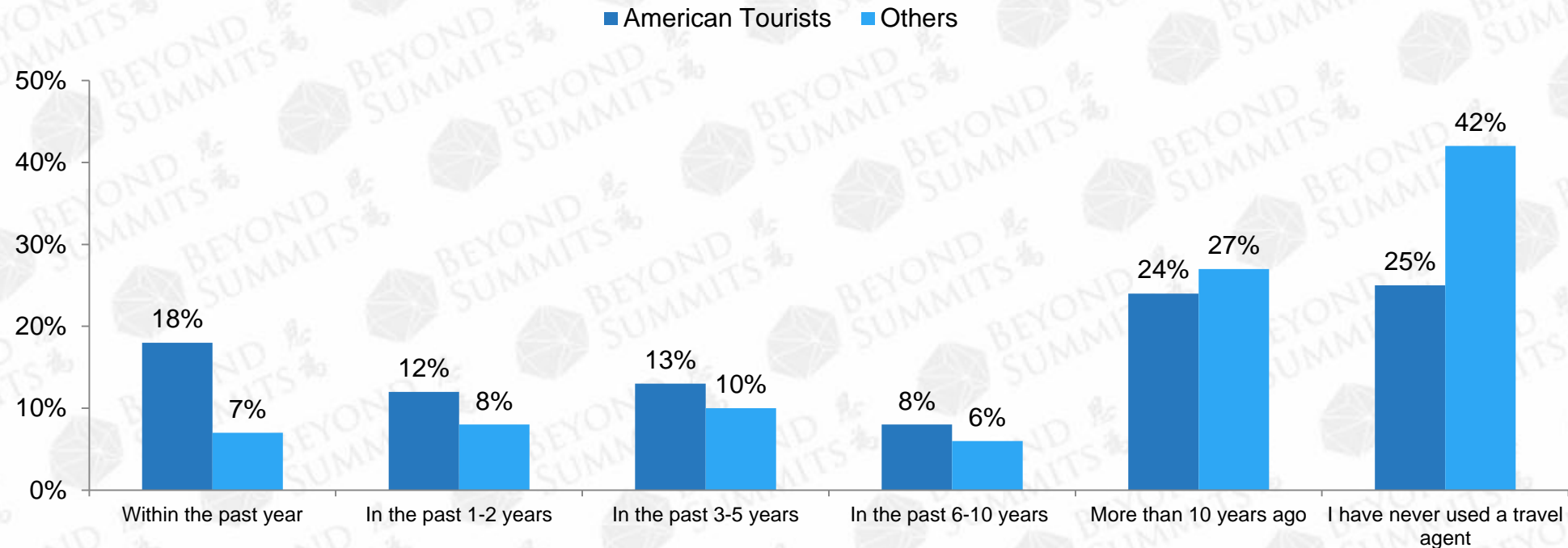
	All U.S. Tourists	Vacation & Visiting Relatives and Friends	Business & Convention
Hotel	63%	61%	79%
Average Time of Stay (Night)	9.9	8.7	9.9
Median Time of Stay (Night)	7.0	7.0	6.0
Private House	41%	45%	25%
Average Time of Stay (Night)	19.4	18.0	22.6
Median Time of Stay (Night)	12.0	12.0	10.0
Others	7%	7%	8%
Average Time of Stay (Night)	14.7	11.6	15.2
Median Time of Stay (Night)	7.0	7.0	6.0

Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

U.S. Global Travelers More Likely To Use a Travel Agent

In the past two years, compared to tourists from other regions, 30% of U.S. tourists were very or extremely likely to use travel agents.

Tourists Using a Travel Agent

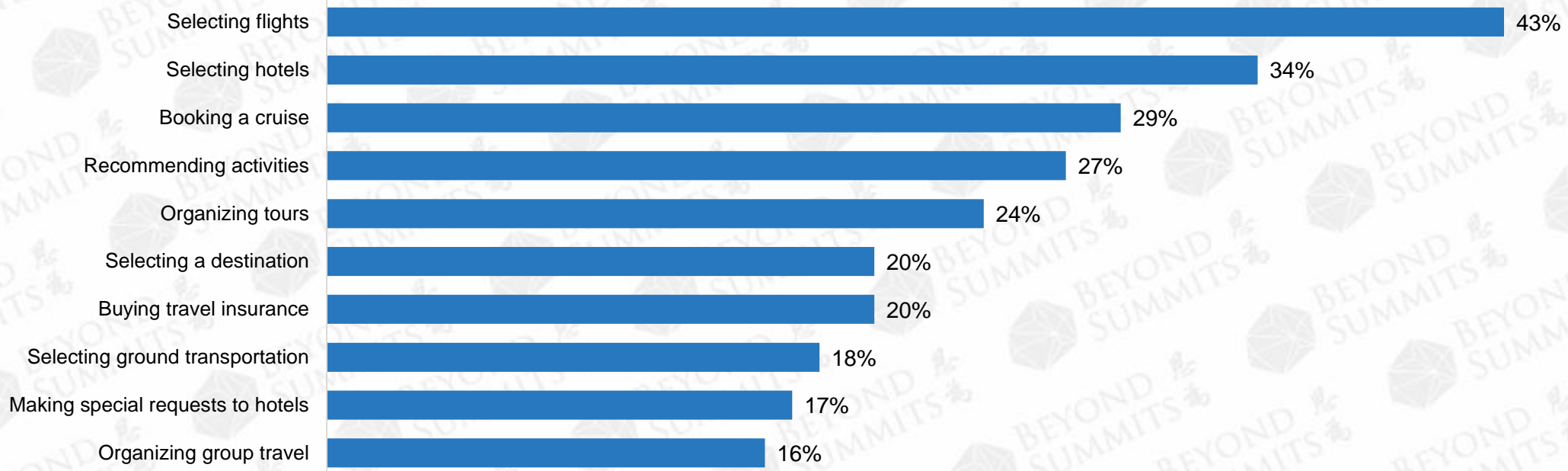


Data Source: ASTA + PSB's 2017 "How America Travels" National Study

The Roles of Travel Agents on U.S. Outbound Tourism

U.S. tourists relied on travel agents in terms of selecting flights and hotels, booking cruises, etc.

Top 10 Roles of Travel Agents on U.S. Outbound Tourism

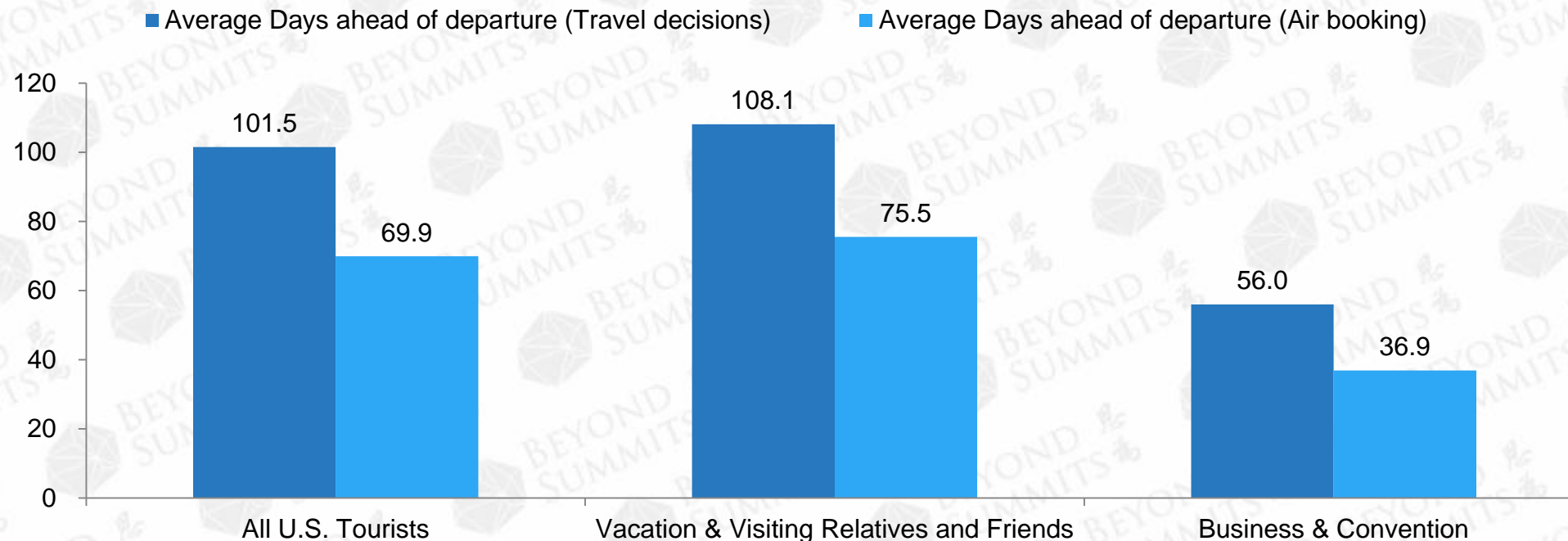


Data Source: ASTA + PSB's 2017 "How America Travels" National Study

Travel Decisions & Booking Time for U.S. Outbound Tourists

In 2015, on average, a U.S. outbound traveler made a travel decision 101.5 days ahead of the departure time and booked air tickets 69.9 days in advance. Compared with tourists traveling for vacations or visiting relatives and friends, business and MICE travelers tended to make a travel decision or book a flight much more earlier.

Travel Decisions & Booking Time for U.S. Outbound Tourists 2015

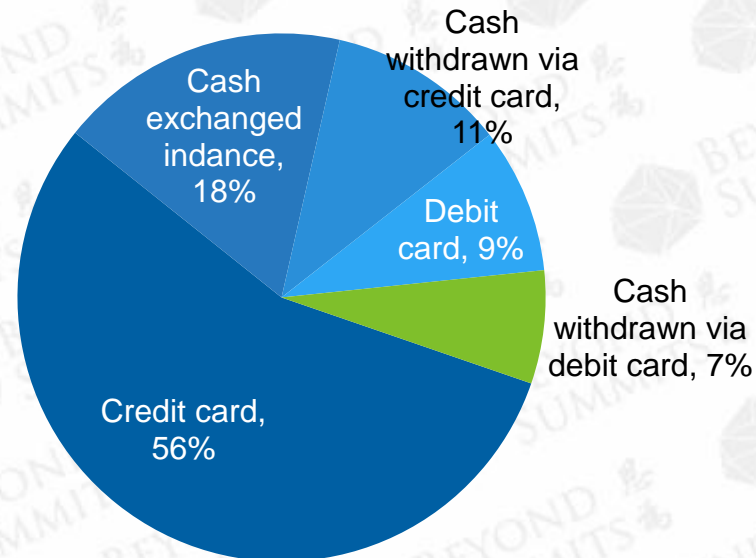


Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

Payment Methods of U.S. Outbound Tourists

In 2015, more than half of U.S. outbound tourists used credit cards for payment when shopping overseas, while 18% used local currencies exchanged in advance.

Payment Methods of U.S. Outbound Tourists 2015



Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

Travel Information Sources for U.S. Tourists

Top 10 Tourism-Related Websites in the U.S.

1	Tripadvisor.com
2	Airbnb.com
3	Expedia.com
4	Southwest.com
5	Aa.Com
6	Kayak.com
7	Delta.com
8	United.com
9	Priceline.com
10	Booking.com

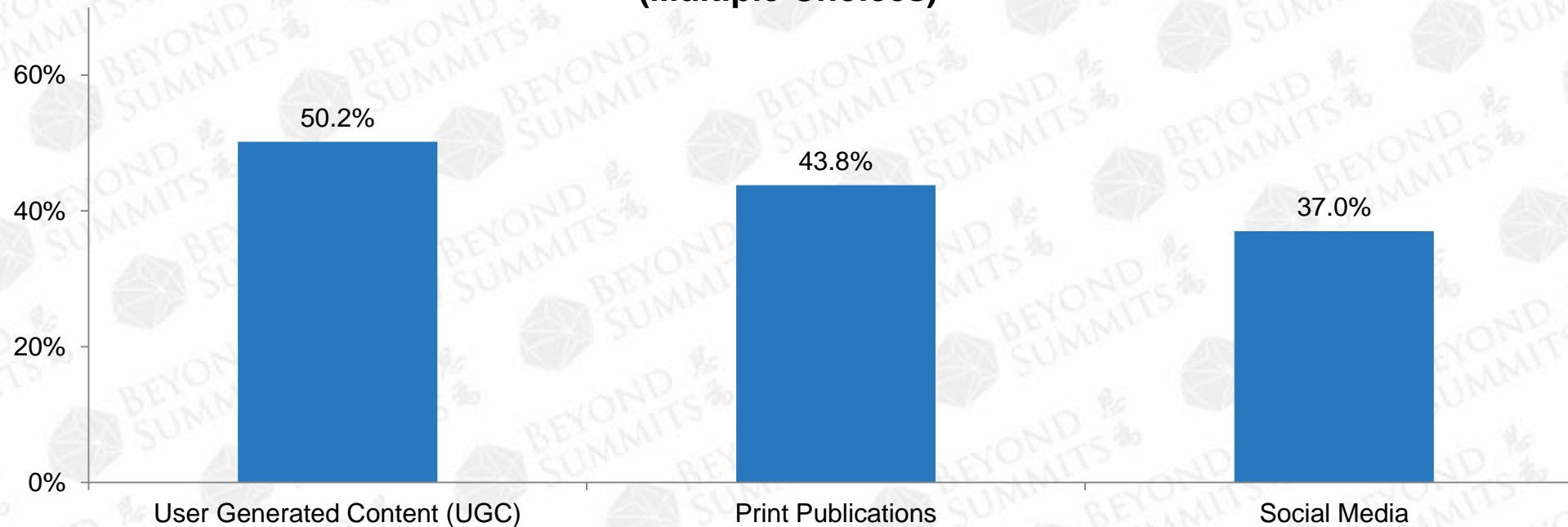


Data Source: SimilarWeb, 2016

Information Sources for U.S. Tourists When Booking a Trip

Based on the data released in January 2015, 50.2% of U.S. tourists would refer to User Generated Content (UGC) for travel booking, and 43.8% would rather look for info from print materials.

Info Sources for U.S. Tourists When Booking a Trip in January 2015 (Multiple Choices)

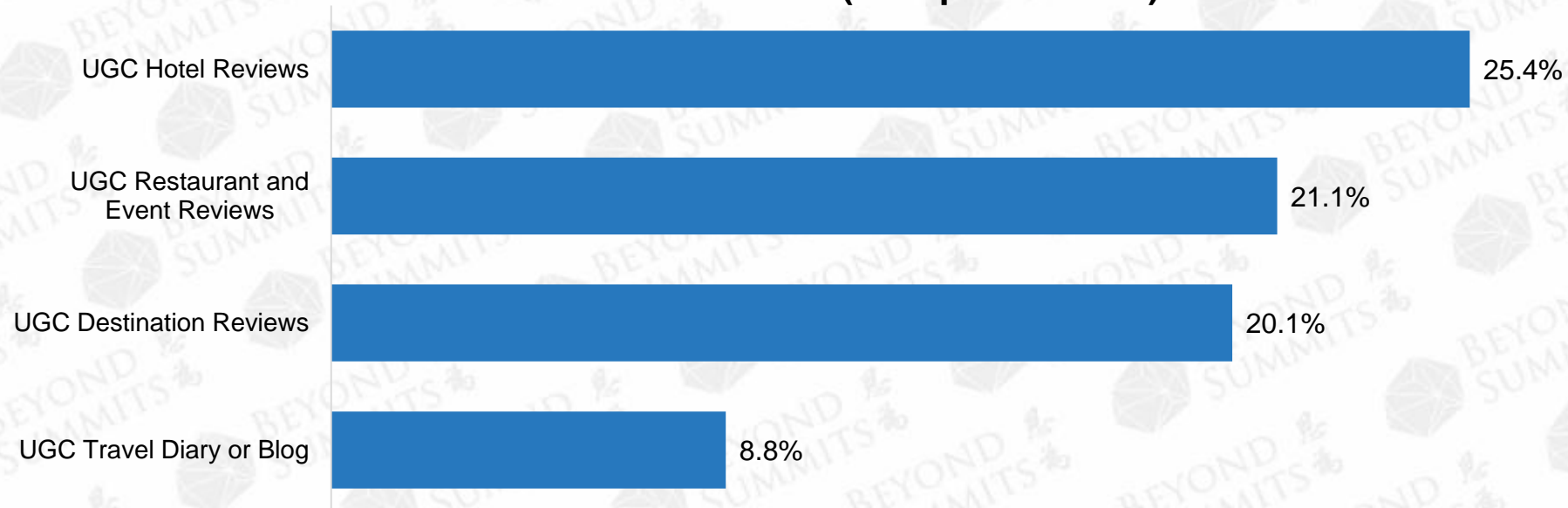


Data Source: Destination Analyst

Information Sources for U.S. Tourists - UGC

In January 2015, among all travel related UGC content, hotel comment was the most reviewed category when U.S. tourists were booking travel products, accounting for 25.4%. Next to it was restaurant and activity reviews at 21.1%.

**Information Sources of U.S. Tourists in January 2015
(Multiple Choices)**



Data Source: Destination Analyst

Information Sources for U.S. Tourists – Print Publications

In January 2015, travel magazines were the main print information sources for U.S. tourists when booking travel products, accounting for 14.9%, followed by travel section on newspapers and direct mails with the same proportion of 13.7% each.

Information Sources for U.S. Tourists – Print Publications

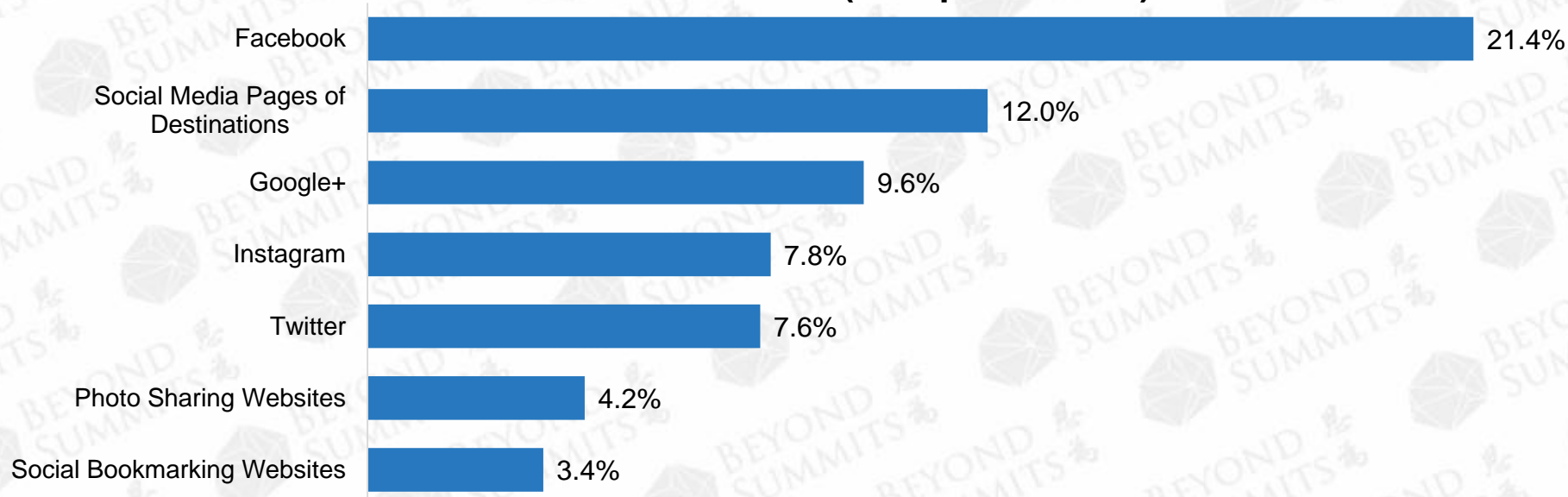


Data Source: Destination Analyst

Information Sources for U.S. Tourists – Social Media

In January 2015, U.S. travelers preferred to get information from social media when booking travel products. Facebook was the most popular social media platform. 12% of tourists followed official pages of travel destinations on social media. Other information sources included Google +, Instagram and Twitter.

**Information Sources for U.S. Tourists – Social Media 2015
(Multiple choices)**

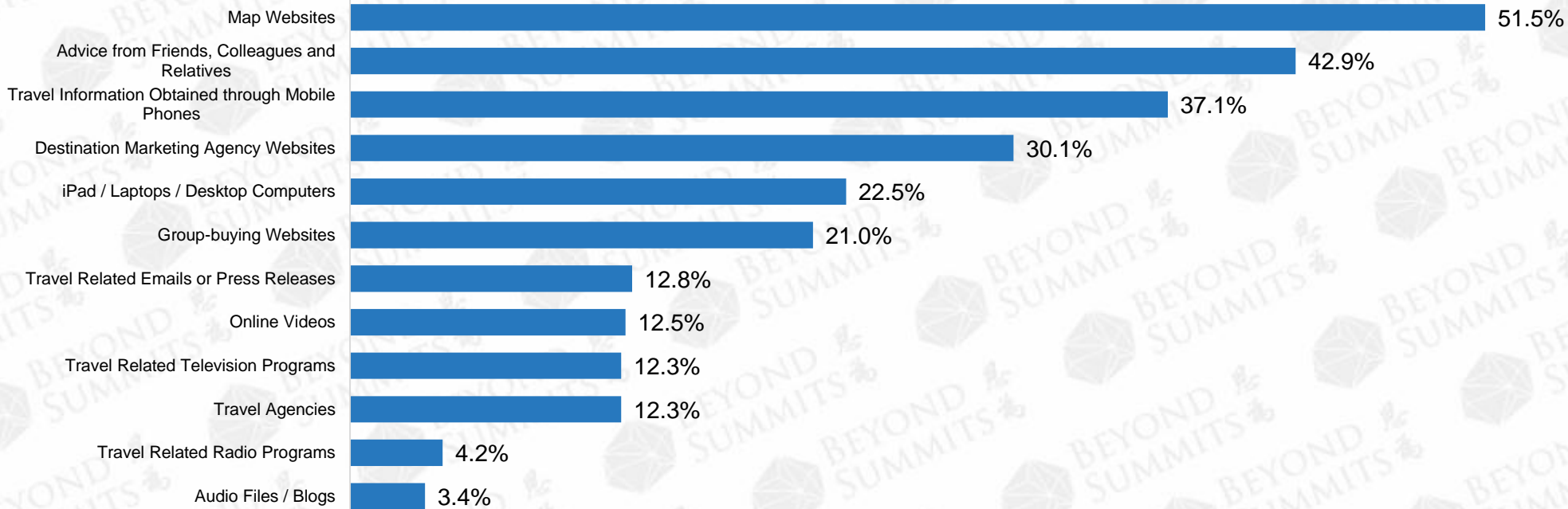


Data Source: Destination Analyst

Information Sources for U.S. Tourists - Others

In addition to UGC, print and social media, U.S. tourists also obtained information from map websites and preferred to seek advice from relatives and friends.

Information Sources for U.S. Tourists in January 2015- Others (Multiple choices)

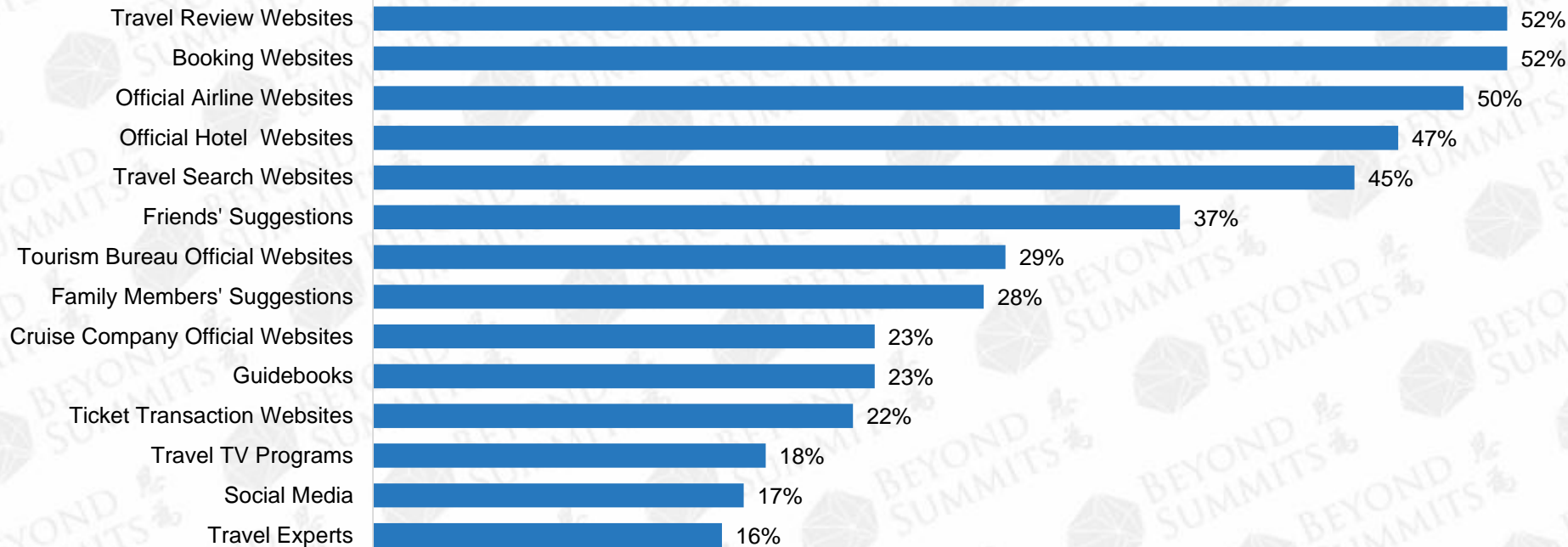


Data Source: Destination Analyst

Information Sources for U.S. Tourists When Booking a Trip

More than half of all U.S. tourists were used to getting information about a trip from travel review websites, OTA websites or official airline websites.

Information Sources for U.S. Tourists When Booking a Trip

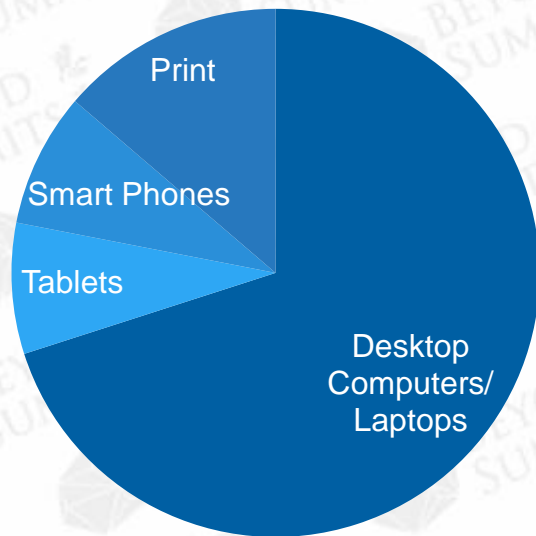


Data Source: ASTA + PSB's 2017 "How America Travels" National Study

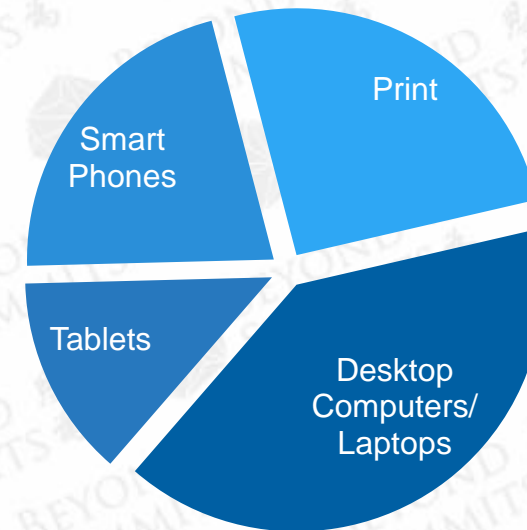
Devices or Tools Used by U.S. Tourists to Acquire Travel Information

According to a survey in January 2015, U.S. tourists were using different tools to acquire travel information before and during the trip. Before the trip, especially when the tourists were planning the itinerary, desktop computers and laptops were used by 69.9% of the tourists, taking the largest proportion. However, during a trip, a growing number of tourists would like to get information through smart phones, tablets and the prints.

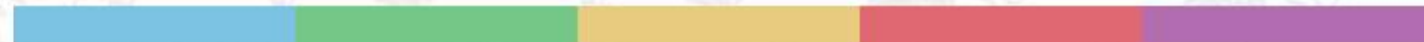
How U.S. Tourists Acquire Travel Information Before Trips



How U.S. Tourists Acquire Travel Information During Trips



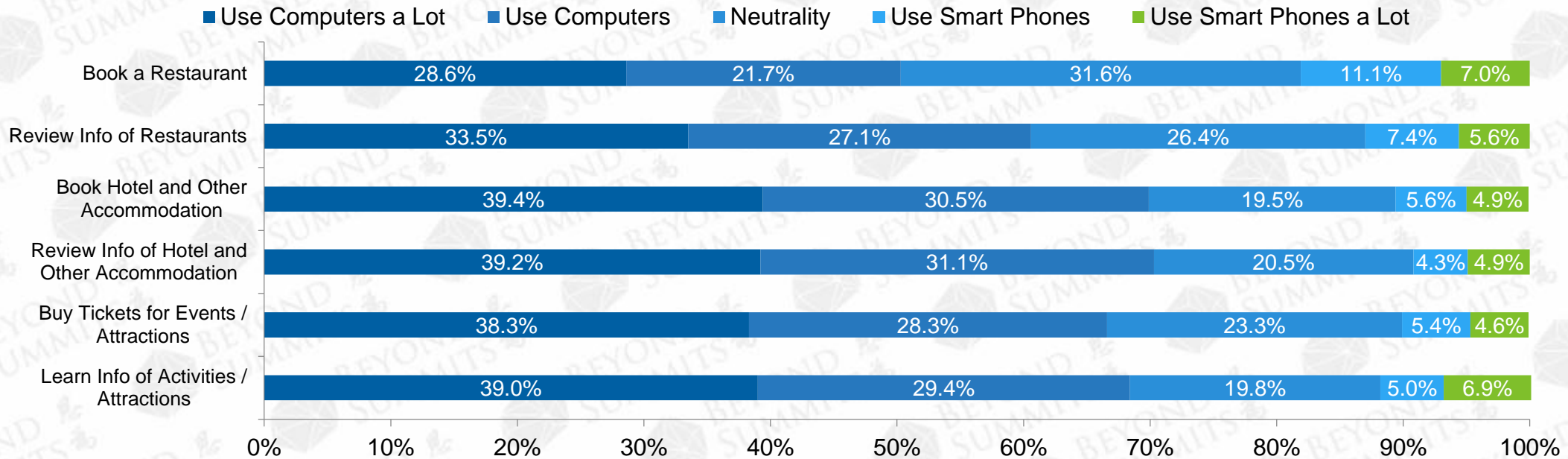
Data Source: Destination Analyst



Devices Used by U.S. Tourists to Acquire Various Travel Information

According to a survey in January 2015, in general, U.S. tourists preferred to use computers for trip planning, especially when booking hotels or event tickets. In addition, smart phones were more widely used for acquiring restaurant information instead of searching for hotels, events and attractions.

U.S. Tourists' Preferences for Different Devices When Planning a Trip in January 2015



Data Source: Destination Analyst

Facts on U.S. Tourists Using Smart Phones to Plan Trips

According to data released in January 2015, U.S. tourists' using habits of smart phones differed during the process of planning a trip:

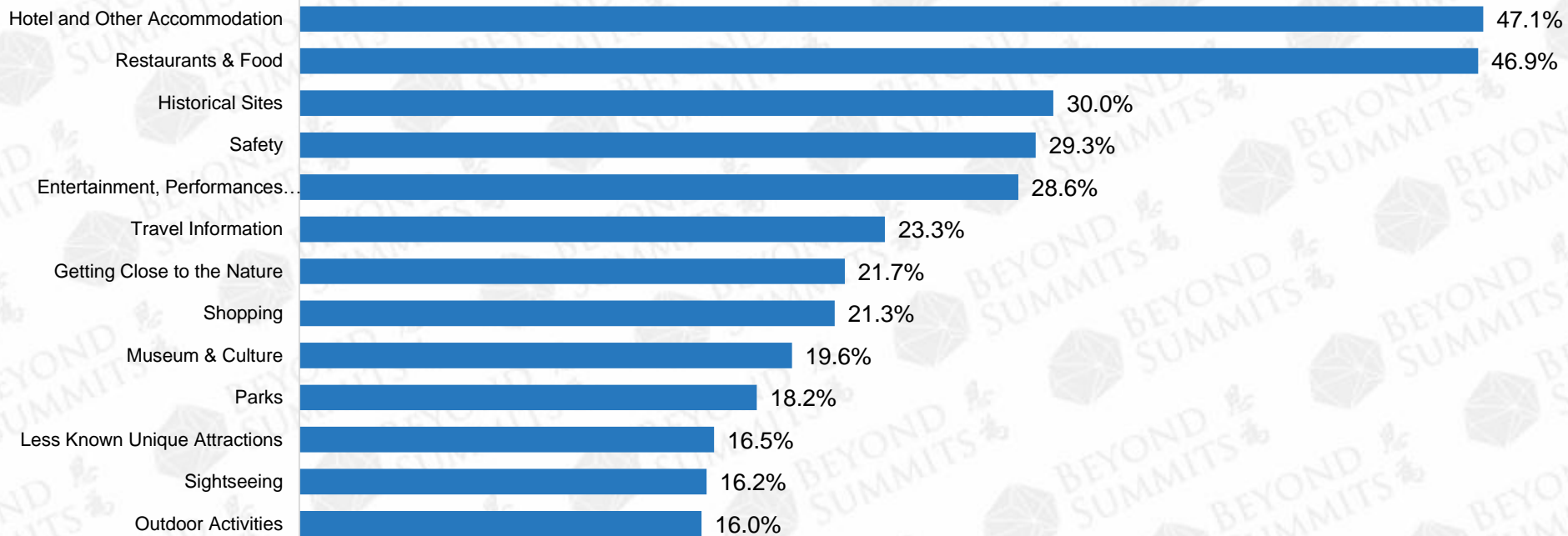
1. 70% of the millennials, compared with only 23% of the baby boomers, would use smartphones to plan trips.
2. More smart phone users than other types of travel planners preferred to acquire information from social media.
3. 28% of trips planned on smart phones were leisure trips.
4. Only 17% of all travel plans were made on smartphones.
5. 74% of smartphone travel planners had a habit of reviewing UGC content to plan a trip.
6. 51% of those who planned trips on smartphones tended to research travel activities and spots via desktop computers and laptops. Generally, only 27% of tourists preferred to use smartphones to deal with all the travel related information.
7. Among those who didn't use smartphones to plan trips, 54% were more inclined to refer to the prints for travel information.
8. Smartphone travel planners showed more positive attitudes towards travelling than non-smartphone travel planners (47% vs 22%), and would like to plan more trips in the next year.
9. There was a relatively higher possibility that a travel planner using a smart phone could be a college graduate and an urban citizen. The possibility was 13% and 19% higher than those who didn't turn to smartphones for travel planning.

Data Source: Destination Analyst

Main Consideration Factors about a Destination

According to the survey in January 2015, accommodation and food were the main factors considered by U.S. tourists when evaluating a destination, accounting for 47.1% and 46.9% respectively, followed by historical sites and safety.

Main Factors Considered by U.S. Tourists about a Destination in January 2015 (Multiple choices)



Data Source: Destination Analyst

U.S. Outbound Tourists Searching for and Booking Travel Products

- According to the research, OTA faced a challenge that travelers were shifting from OTAs to brand websites for searching and booking travel products.
- In 2015, only 58% of travelers acquired travel information through OTA, much lower than the proportion of 84% in 2014.
- In terms of booking via OTA, the situation was even more severe: only 13% of the travelers who visited OTA for information search and trip planning finally booked their trips on these OTA websites, dropping from 36% compared to one year ago.
- People interviewed explained that they believed direct sales channels would provide them a better price (64%), and these channels were more convenient than OTA (67%).

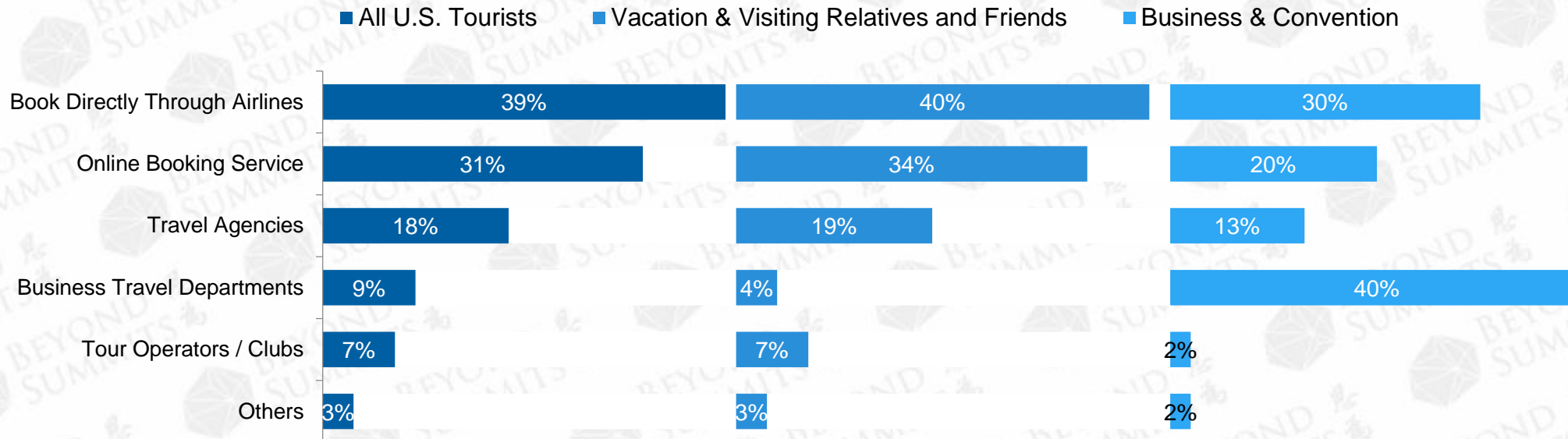


Data Source: American Travelers' Behavioral Habit in 2015

How U.S. Outbound Tourists Book Air Tickets

In 2015, among all U.S. outbound tourists, the biggest proportion of them (39%) booked air tickets directly from airlines, followed by those booking through online service providers and travel agents, accounting for 31% and 18% respectively. However, for travelers for business and conferences, their air tickets were usually booked by the staff in the dedicated travel department of their companies, taking 40% of the total.

US Outbound Tourists' Ways of Booking Air Tickets 2015 (Multiple Choices)

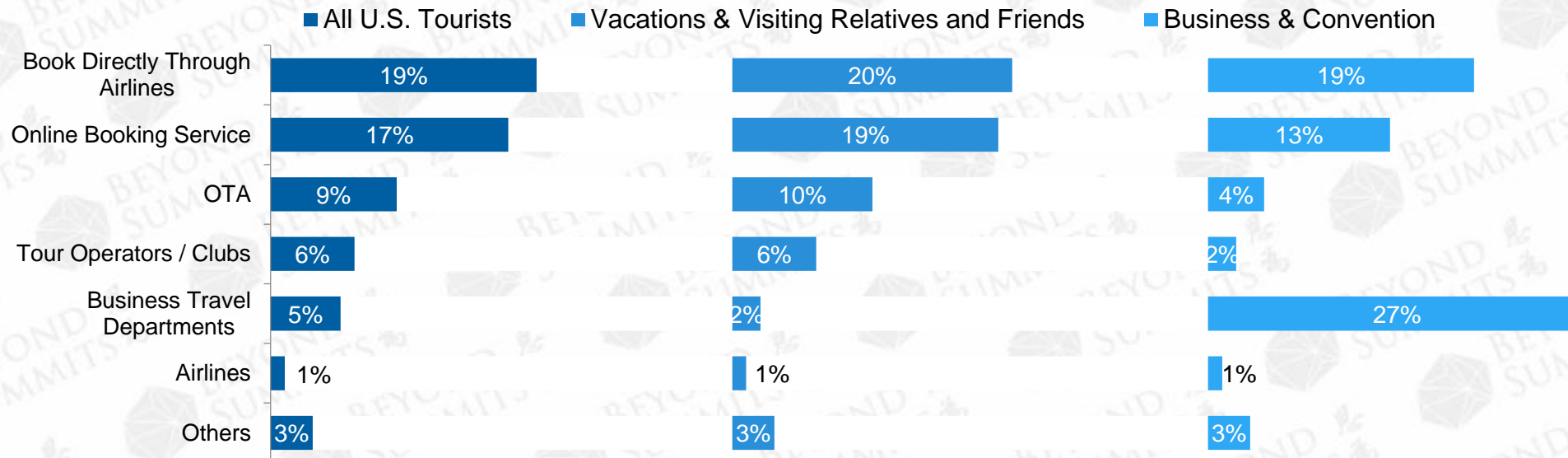


Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

How U.S. Outbound Tourists Book Accommodation

In 2015, the largest proportion of American outbound tourists booked accommodation via direct sales channels, accounting for 19%, followed by 17% via the internet and 9% via OTA.

How U.S. Outbound Tourists Book Accommodation 2015 (Multiple Choices)

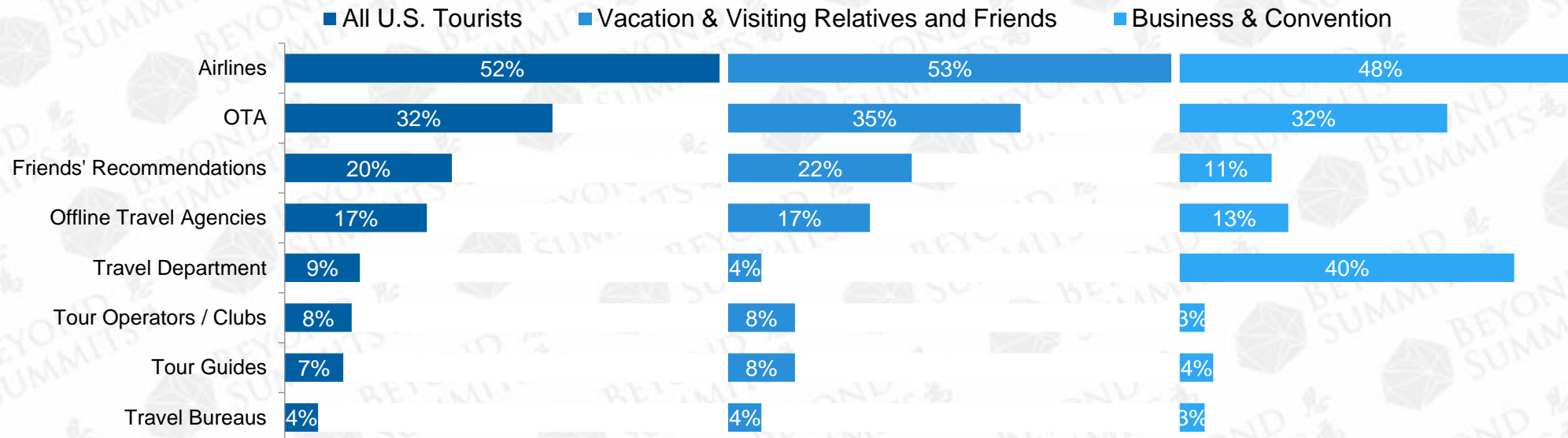


Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

How U.S. Outbound Tourists Get Information about Air Tickets

In 2015, 52% of U.S. outbound tourists received air ticket information from airlines, followed by 32% from OTA and 20% from friends' recommendations.

How U.S. Outbound Tourists Get Information about Air Tickets 2015 (Multiple Choices)



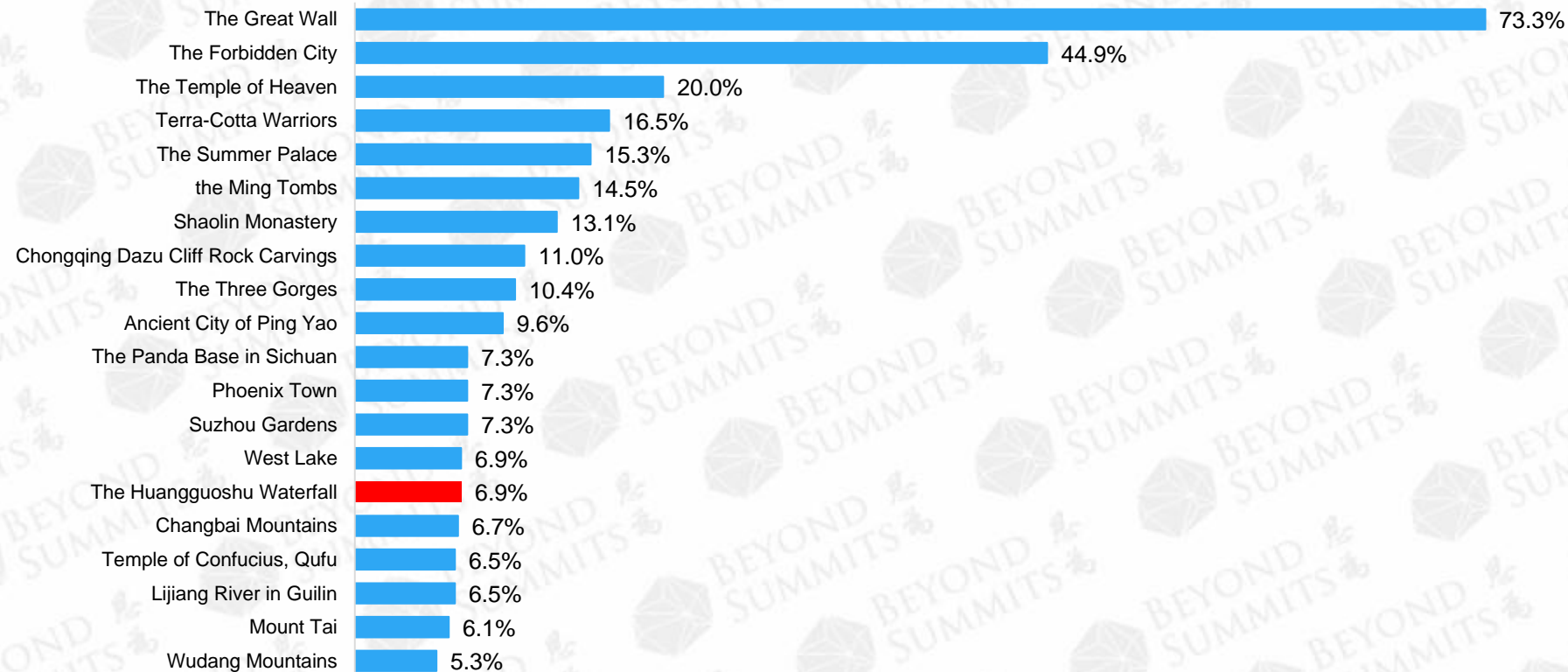
Data Source: US National Travel and Tourism Office Note: Excluding visitors to Mexico and Canada

China Tourism Market Overview on U.S. Tourists to China/Guizhou/Guiyang

U.S. Tourists' Willingness About China's Scenic Spots

Among all the popular scenic spots in China, 6.9% of U.S. tourists were willing to visit the Huangguoshu Waterfall.

U.S. Tourists' Travel Willingness about Scenic Spots in China

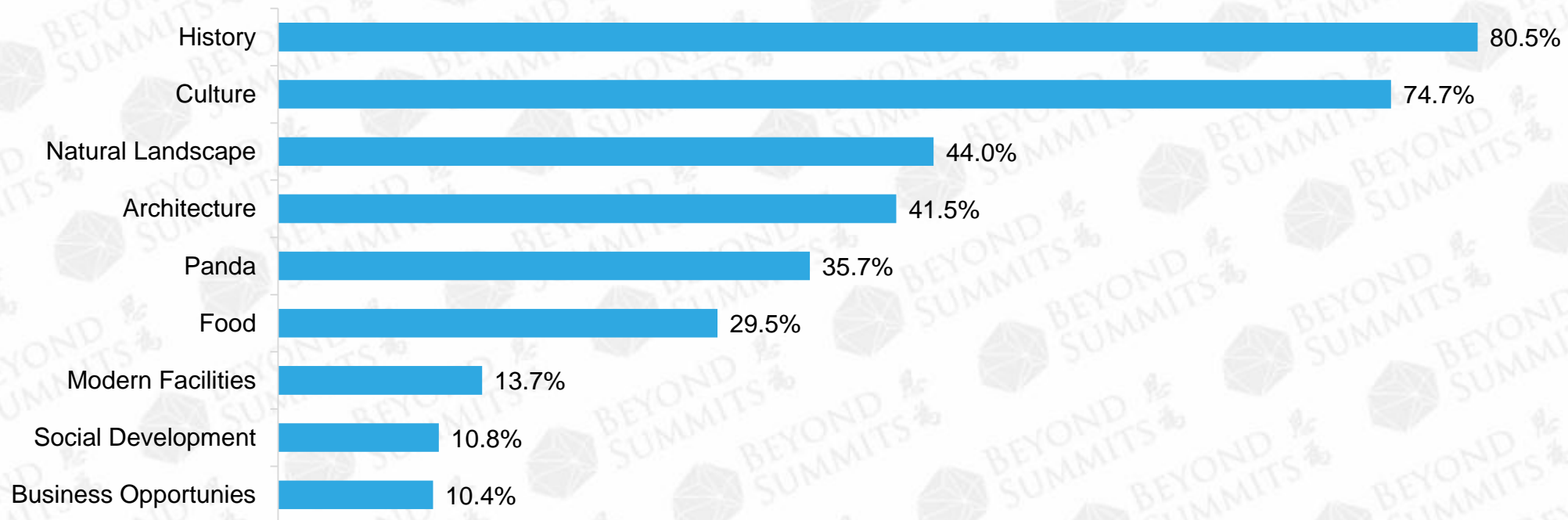


Data Source : 2014年美国来华旅游舆情调查报告

U.S. Tourists' Positive Impression on China's Tourism Resources

For U.S. tourists, what impressed them most are China's long history, rich culture as well as scenic spots and historical sites.

U.S. Tourists' Positive Impression on China's Tourism Resources

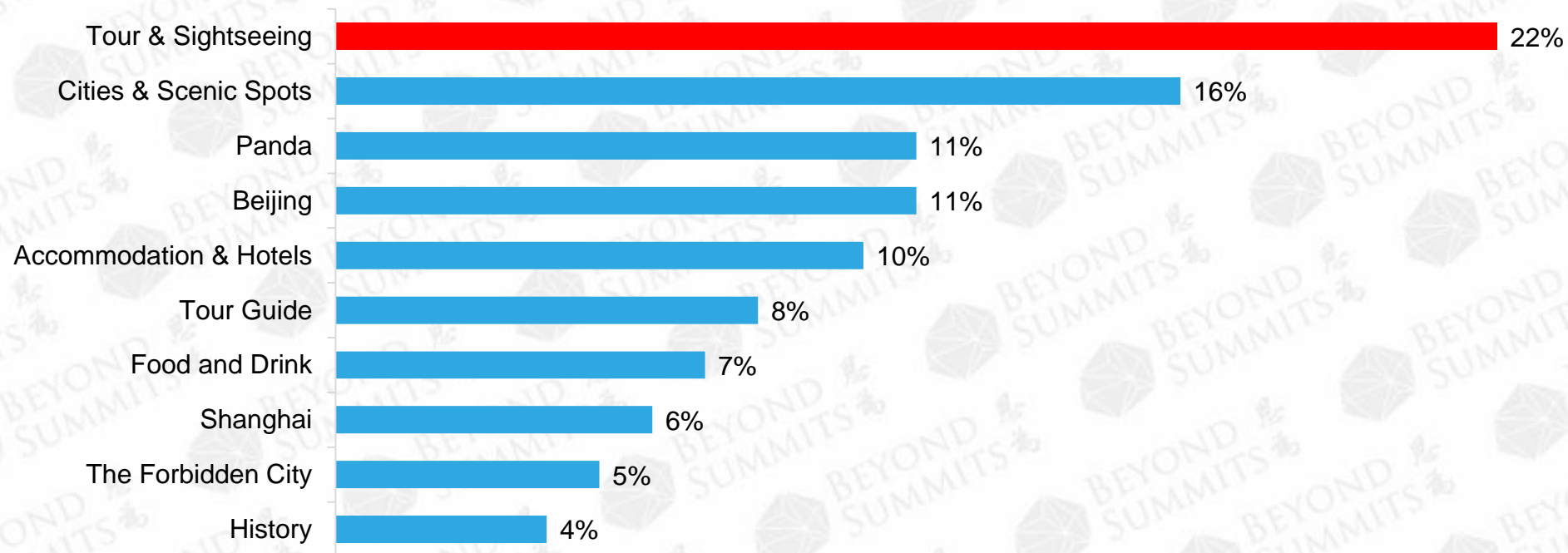


Data Source : ASTA + PSB's 2017 "How America Travels" National Study

Most Popular Topics of U.S. Tourists to China on Social Media

For U.S. tourists visiting China, their most popular topics on social media were tour & sight seeing (22%) and cities & scenic spots (16%). And the top attractions for them were Panda, the Forbidden City and Terra-Cotta Warriors.

Most Popular Topics of U.S. Tourists to China on Social Media

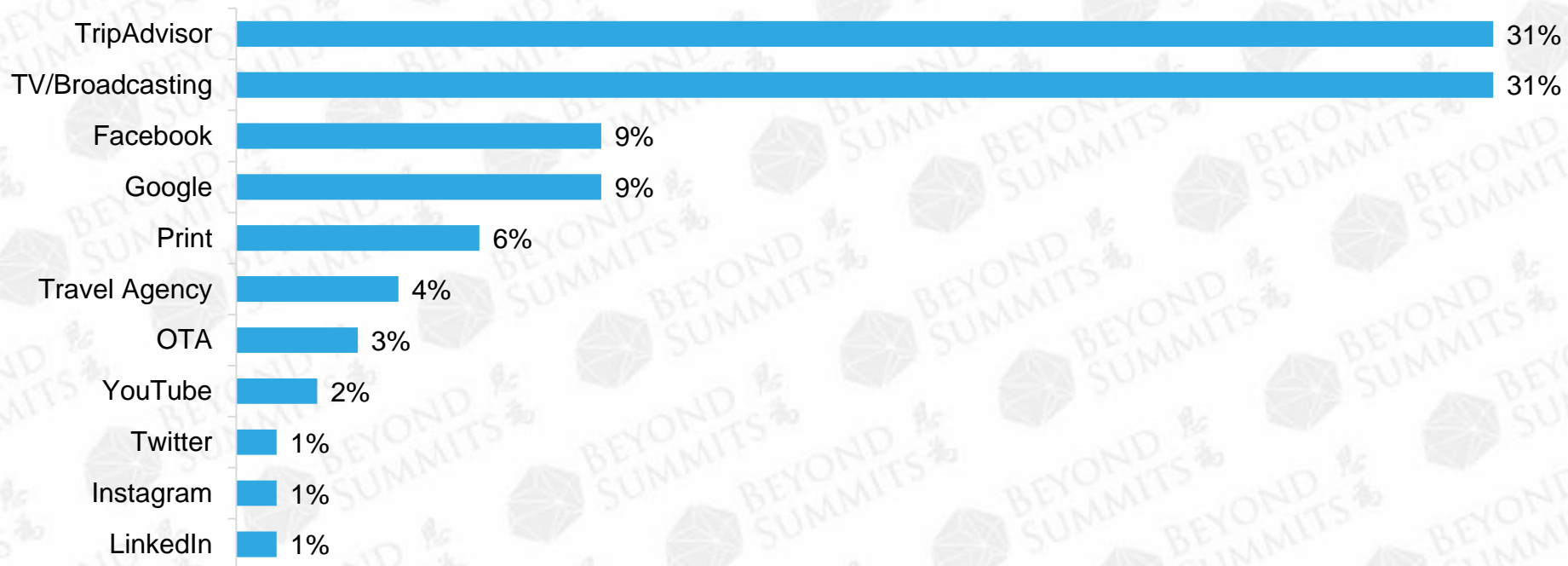


Data Source : 传奇智旅，社交媒体大数据预测美国来华游客前景，2011.3-2016.3

Channels for U.S. Tourists to Acquire Travel Information about China

31% of U.S. tourists acquired travel information about China via Trip Advisor, which was the Top 1 information channel. Besides, the traditional media of TV/Broadcasting also played an important role with a proportion of 31%.

U.S. Tourists' Information Channels about China Tourism

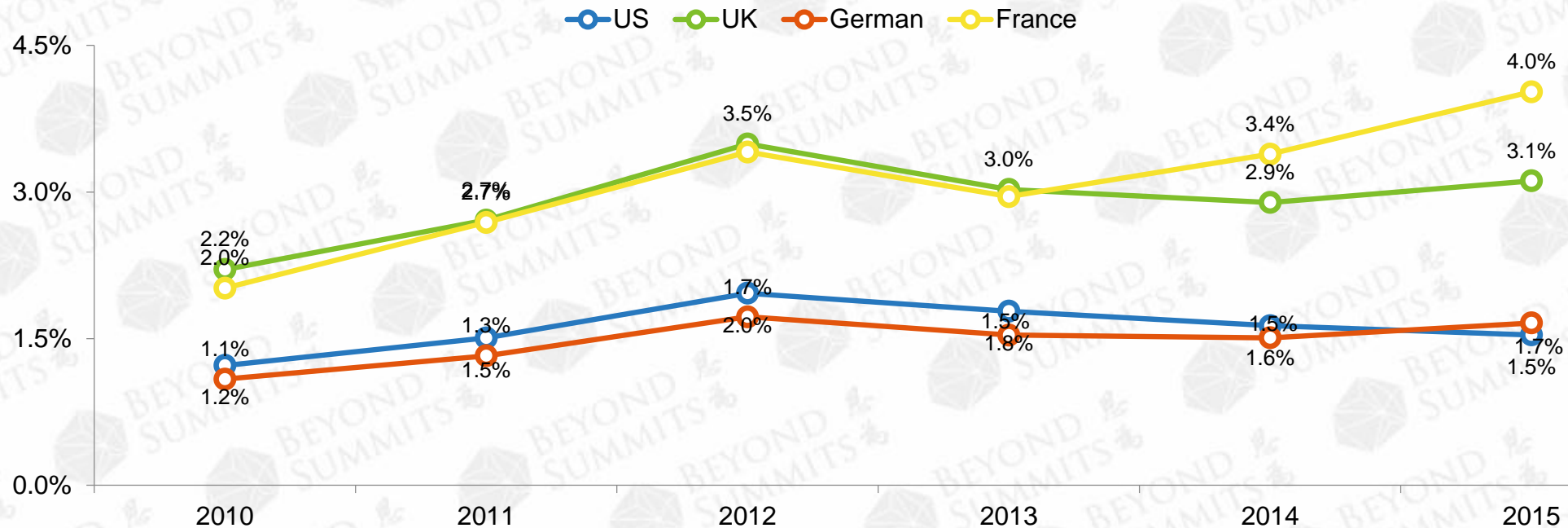


Data Source : 传奇智旅, 社交媒体大数据预测美国来华游客前景, 2011.3-2016.3

European & U.S. Tourists to Guizhou & China

The data of 2010-2015 showed that among the four countries of the U.S., the U.K., France and Germany, tourists from the U.K. and France are more likely to travel to Guizhou. In 2015, U.S. tourists to Guizhou accounted for 1.5% of all U.S. tourists to China.

European & U.S. Tourists - To Guizhou Against To China 2010-2015



Data Source : 中国旅游统计年鉴, 中国国家旅游局

上海思为文化传播有限公司 BEYOND SUMMITS LTD

U.S. – 2nd Biggest Source Country of Oversea Tourists to Guizhou

In 2016, the U.S. was the 2nd biggest source country of overseas tourists to Guizhou with a total number of 54,568, increasing largely by 32.2% compared to last year.

TOP 10 Source Countries of Oversea Tourists to Guizhou 2016 (Number of Visits)



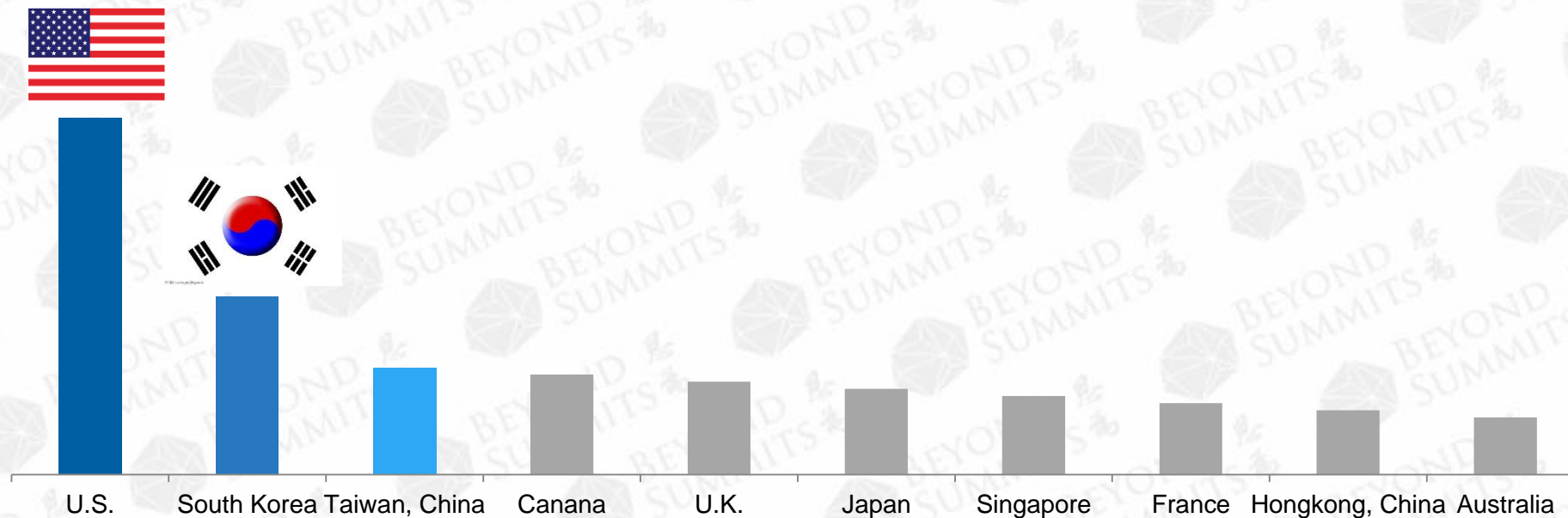
Data Source : 贵州省统计局

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U.S. – No. 1 Source Country of Oversea Tourists (Online) to Guiyang

In 2016 Guiyang saw a rapid development of online inbound tourism. The overseas tourists booking via online channels to Guiyang grew by 17% compared to last year with the U.S. being the No. 1 source country.

TOP 10 Source Countries/Areas of Oversea Tourists to Guiyang (Online) 2016



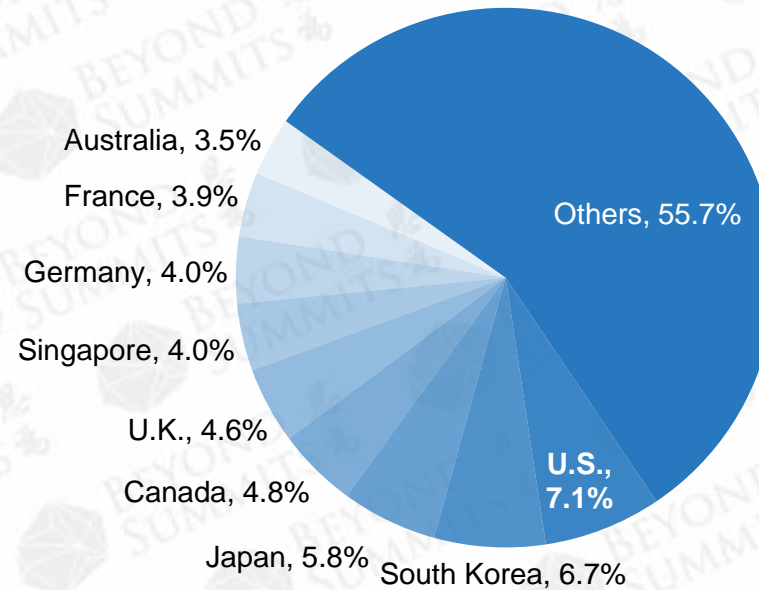
Data Source : 携程, 2017年贵阳旅游大数据报告

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U.S. – No. 1 Source Country of Overnight Oversea Visitors to Guiyang

In 2015, U.S. ranked TOP1 in terms of the total number of overnight overseas visitors to Guiyang, accounting for 7.1% of all overnight overseas visitors to Guiyang.

Overnight Oversea Visitors to Guiyang by Country 2015



Data Source : 中国旅游统计年鉴

ACS 2017 Will Greatly Boost the Inbound Tourism of Guiyang

ASTA China Summit 2017 (ACS 2017) will greatly boost the inbound tourism of Guiyang, Guizhou. A promising rising trend is clearly foreseen based on the historical data from American Society of Travel Agents (ASTA).

- In the destination promotion events organized by ASTA, 98% participants were willing to cooperate with new suppliers and book relevant products in the future;
- Among the participants attending the destination promotion events organized by ASTA, 94% of them tended to recommend the event to another organization;
- Among the participants attending the destination promotion events organized by ASTA, over half of them declared that the sales volume of their travel products of the relevant destinations had increased as a result;
- Participants were exposed to the promotion info of various sponsors on site and had face-to-face talks with representatives from different companies. As a result, 76% of all the participants were willing to further develop business cooperation with the sponsors of the events;
- ASTA events brought great experience to the participants with 77% of them expecting to send more clients to the relevant destinations in the future.

By leveraging trade meetings, marketing and promotion activities and communication mechanism set up during ACS 2017, Guiyang, Guizhou is expected to be a new growth point of North-American inbound tourists to China.



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