

Travel South USA Travel Trends

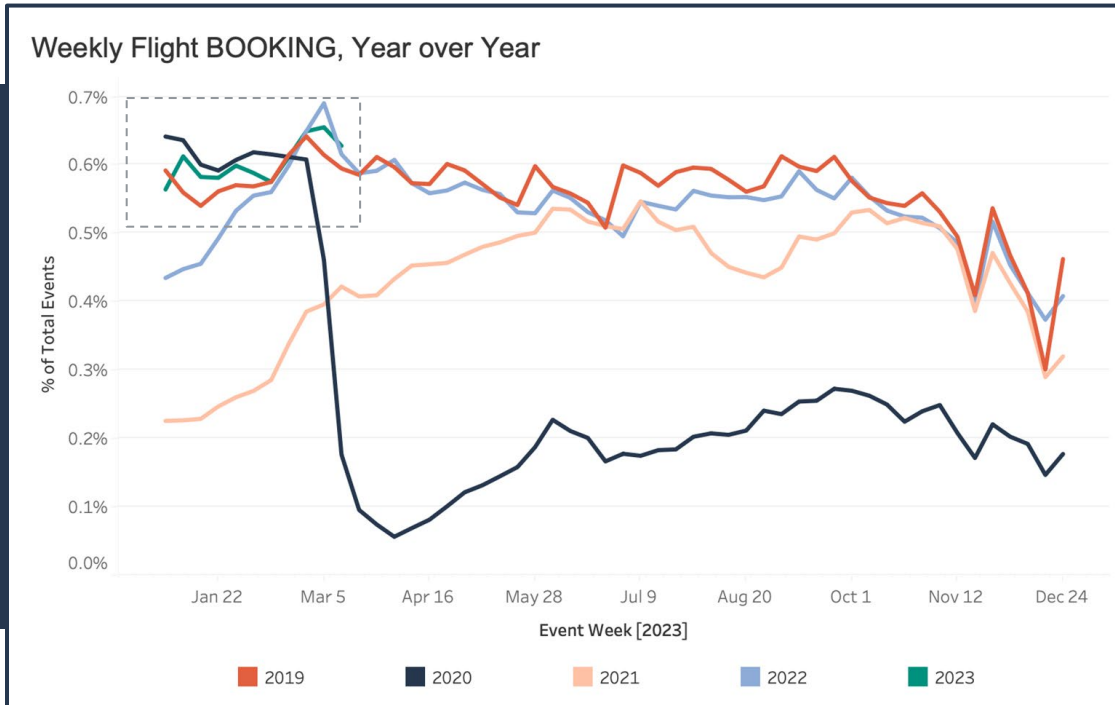
APRIL 2023

Presenter: Todd Schechter



All Flight Bookings into US South

States: Alabama, Arkansas, Georgia, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, South Carolina, Tennessee, Virginia, West Virginia



Flight bookings are closely tracking 2019 levels and trending so far in 2023

Top Origins to US South

Top Origin Countries

Flight BOOKING

Date range: 1/1/2023 - 3/23/2023

	2023
1	United States, 89.8%
2	Canada, 2.1%
3	Mexico, 1.0%
4	United Kingdom, 0.7%
5	Germany, 0.6%
6	India, 0.4%
7	Puerto Rico, 0.4%
8	France, 0.3%
9	Italy, 0.3%
10	South Korea, 0.2%

Flight BOOKING

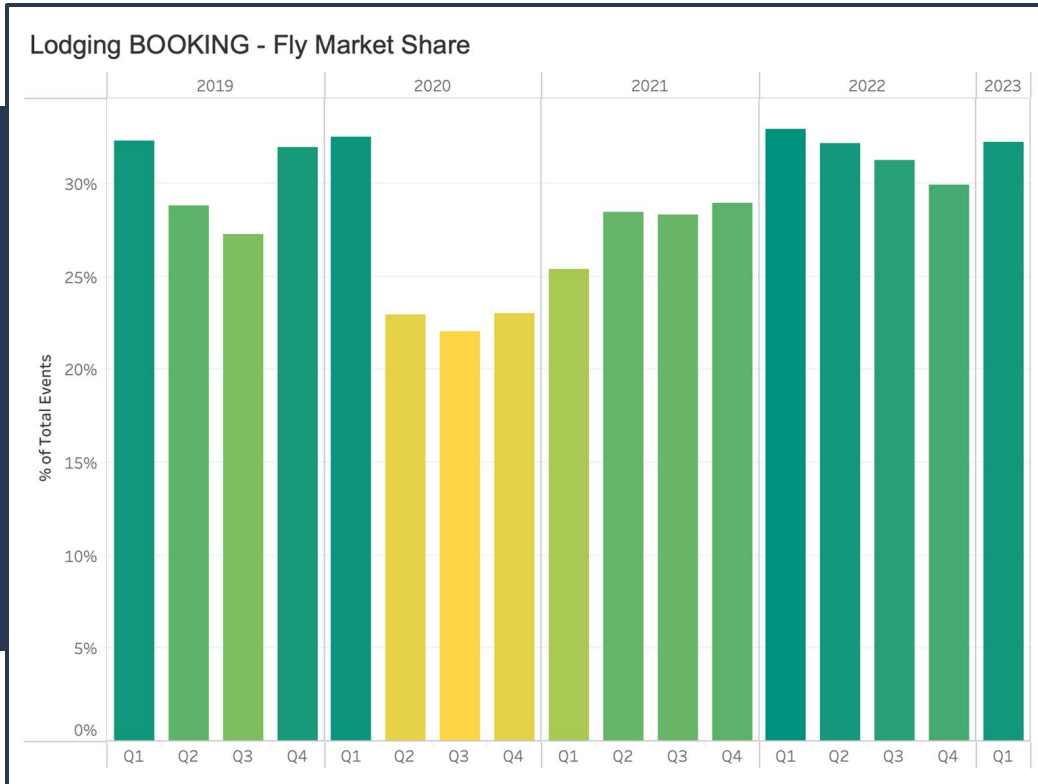
Date range: 1/1/2019 - 3/31/2019

	2019
1	United States, 90.0%
2	Canada, 2.5%
3	United Kingdom, 0.8%
4	Mexico, 0.8%
5	Germany, 0.6%
6	India, 0.4%
7	Puerto Rico, 0.3%
8	Japan, 0.2%
9	China, 0.2%
10	France, 0.2%

Travel into the US southern states is overwhelming domestic

Comparing Q1 2023 vs. 2019, Western Europe (France and Italy) overtook East Asia (Japan and China) in top 10 origins

Flight Market, Year over Year



Flight markets continue reclaiming market share over drive markets post pandemic lockdowns

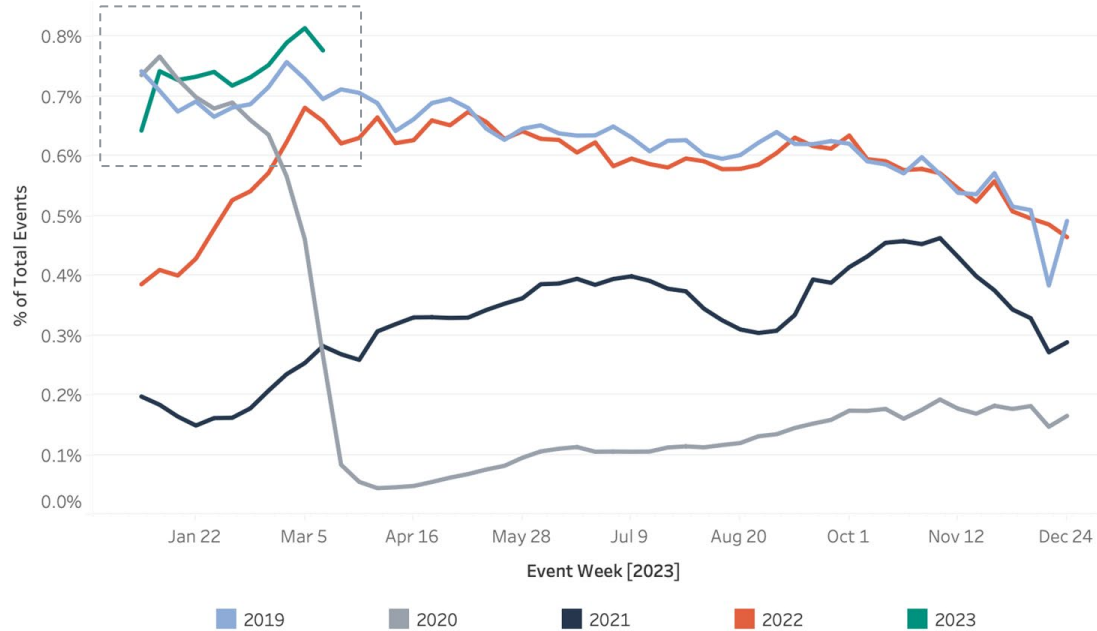
Flight markets are defined as 500+ miles between the destination and the traveler's origin at time of booking



Sojern Data Shows
International Travel to US
is Back

International Flight Bookings into US South

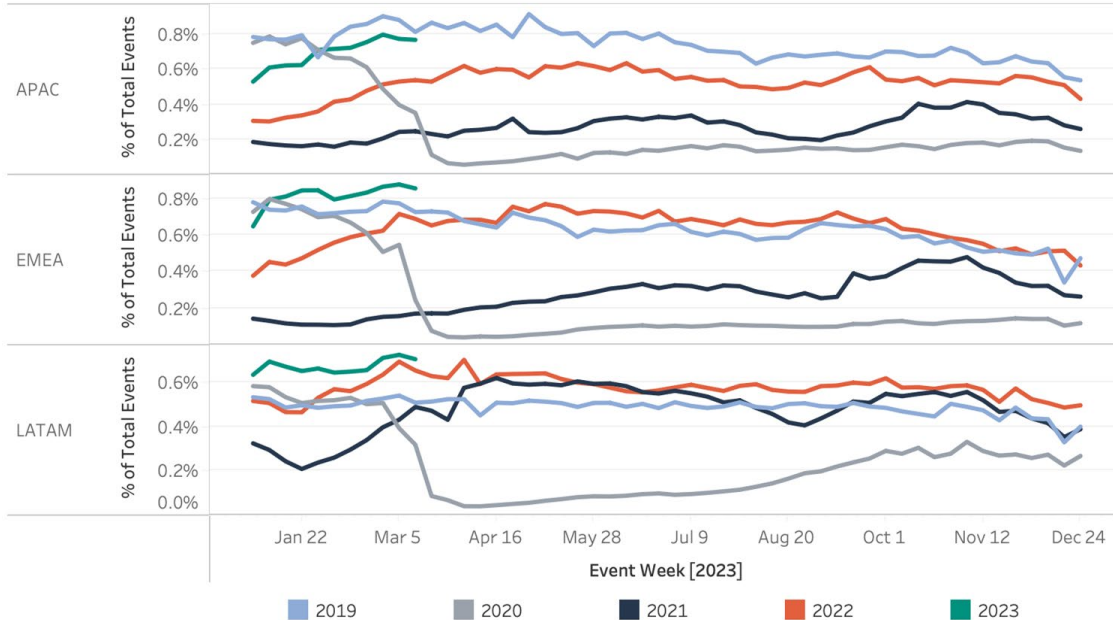
Weekly Flight BOOKING, Year over Year



International flight bookings into US Travel South destinations tracked 2019 levels since spring 2022 and surpassed 2019 volumes early in 2023

International Flight Bookings by Origin Region

Weekly Flight BOOKING, Year over Year



APAC is approaching 2019 booking volumes

LATAM and EMEA saw strong performance in 2022 where levels surpassed 2019

Top Origin Countries by Region

Flight BOOKING - APAC

Origin Country	2023 Q1	
	% of Total Events	Quarter % change
India	31%	42%
South Korea	17%	5%
Japan	13%	-2%
Philippines	6%	6%
Australia	5%	-3%
Vietnam	6%	14%
Thailand	4%	50%
China	4%	112%
New Zealand	2%	-29%
Singapore	2%	23%

Flight BOOKING - EMEA

Origin Country	2023 Q1	
	% of Total Events	Quarter % change
United Kingdom	21%	36%
Germany	16%	23%
France	8%	31%
Italy	8%	52%
Spain	5%	47%
Netherlands	4%	36%
Ireland	3%	48%
Switzerland	3%	45%
South Africa	2%	63%
Denmark	2%	26%

Flight BOOKING - LATAM

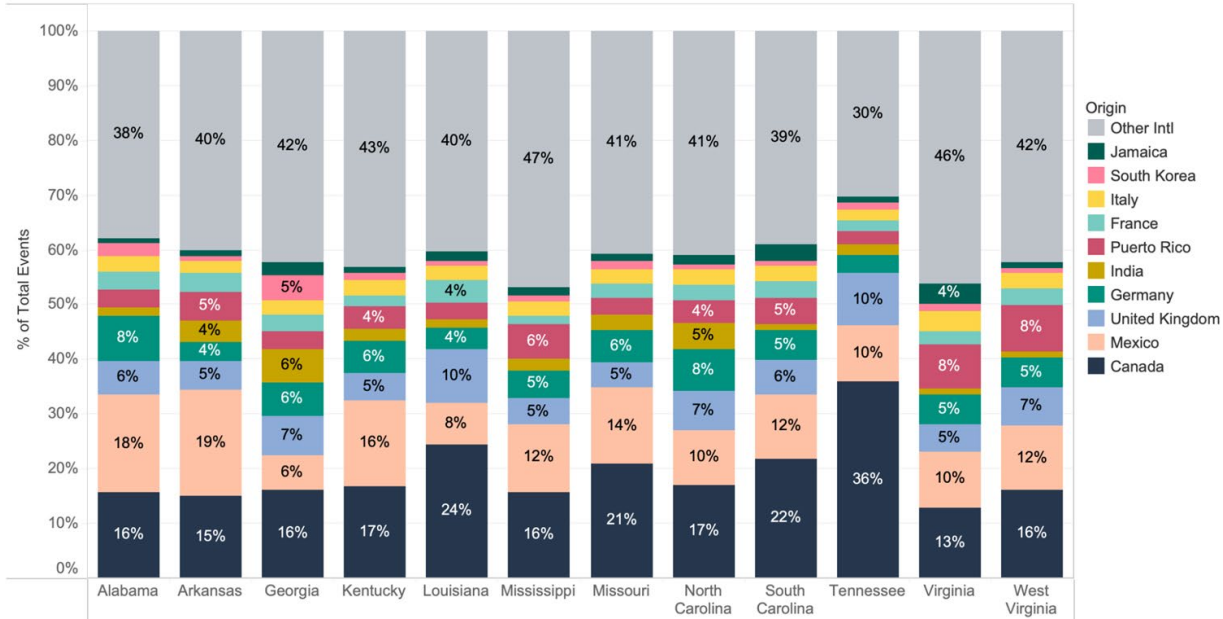
Origin Country	2023 Q1	
	% of Total Events	Quarter % change
Mexico	51%	10%
Brazil	8%	5%
Colombia	7%	1%
Costa Rica	6%	10%
Honduras	5%	16%
Guatemala	4%	8%
Panama	3%	-9%
Ecuador	4%	61%
El Salvador	3%	53%
Argentina	2%	-22%

- Strong quarterly growth in Europe and also from China, given its recent re-opening

Origin Market Share by Destination State

Flight BOOKING

Date range: 1/1/2023 - 3/31/2023



Top 10 international countries into US southern states make up over 50% of visitors

Top US Destinations for International Travelers

Top Destination Airports -

Date range: Q1 (Jan - Mar)

Rank	2023
1	IAD - Washington DC (28.3%)
2	ATL - Atlanta, GA (17.9%)
3	BNA - Nashville, TN (6.7%)
4	CLT - Charlotte, NC (6.7%)
5	DCA - Washington DC (6.5%)
6	RDU - Raleigh-Durham (Fayetteville), NC (5.3%)
7	MSY - New Orleans, LA (5.2%)
8	STL - St. Louis, MO (2.8%)
9	MCI - Kansas City, MO (2.6%)
10	CHS - Charleston, SC (1.6%)

Flight BOOKING

Rank	2022
1	IAD - Washington DC (27.6%)
2	ATL - Atlanta, GA (19.0%)
3	CLT - Charlotte, NC (6.7%)
4	DCA - Washington DC (6.2%)
5	BNA - Nashville, TN (6.0%)
6	RDU - Raleigh-Durham (Fayetteville), NC (5.4%)
7	MSY - New Orleans, LA (5.2%)
8	STL - St. Louis, MO (2.7%)
9	MCI - Kansas City, MO (2.6%)
10	CHS - Charleston, SC (1.6%)

Nashville (BNA) rose in popularity to surpass Charlotte (CLT) and Washington (DCA)

Top US Destinations by Region

Top Metros - Flight BOOKING

Date range: Q1 2023 (Jan - Mar)

Rank	APAC	EMEA	LATAM
1	Washington DC (40.5%)	Washington DC (42.6%)	Washington DC (31.8%)
2	Atlanta, GA (23.4%)	Atlanta, GA (16.7%)	Atlanta, GA (16.8%)
3	Raleigh-Durham (Fayetteville), NC (5.5%)	Charlotte, NC (6.6%)	Charlotte, NC (7.6%)
4	Charlotte, NC (4.7%)	New Orleans, LA (4.9%)	Raleigh-Durham (Fayetteville), NC (5.6%)
5	New Orleans, LA (3.4%)	Nashville, TN (4.8%)	Nashville, TN (5.4%)
6	Nashville, TN (3.4%)	Raleigh-Durham (Fayetteville), NC (4.7%)	New Orleans, LA (4.7%)
7	St. Louis, MO (2.7%)	St. Louis, MO (2.5%)	Kansas City, MO (3.8%)
8	Norfolk-Portsmouth-Newport News, VA (1.9%)	Kansas City, MO (2.0%)	St. Louis, MO (2.7%)
9	Kansas City, MO (1.9%)	Norfolk-Portsmouth-Newport News, VA (1.6%)	Greenville-Asheville-Anderson, SC (1.7%)
10	Memphis, TN (1.3%)	Memphis, TN (1.5%)	Memphis, TN (1.7%)

- International travelers fly into DC, Atlanta and North Carolina (Raleigh and Charlotte) airports most often



International Traveler Behaviors

Understanding Departure Months

When are people arriving at your destination?

Flight BOOKING - Future Departures

Events in March 2023

Origins (Top)	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23
Canada	20.9%	29.9%	17.6%	11.4%	8.8%	4.8%	3.7%	2.1%	0.6%	0.2%
Mexico	37.8%	30.4%	13.3%	8.6%	5.1%	2.2%	0.8%	0.9%	0.7%	0.4%
Jamaica	28.1%	29.1%	17.0%	9.6%	9.0%	3.0%	1.4%	1.0%	1.1%	0.8%
Puerto Rico	33.6%	28.7%	17.6%	9.7%	5.9%	1.9%	1.0%	0.4%	0.6%	0.6%
France	22.9%	24.4%	21.4%	12.1%	8.1%	5.1%	2.4%	2.3%	0.5%	0.8%
Germany	24.9%	26.2%	16.4%	10.4%	8.6%	5.9%	3.6%	2.4%	0.8%	0.8%
Italy	16.9%	19.7%	22.5%	22.0%	7.6%	4.1%	2.8%	3.1%	0.6%	0.6%
United Kingdom	18.7%	29.2%	19.4%	11.6%	7.3%	4.4%	3.5%	3.2%	1.4%	1.4%
India	23.9%	32.1%	22.7%	10.5%	5.3%	3.2%	1.6%	0.3%	0.2%	0.2%
South Korea	32.5%	26.3%	15.4%	10.4%	6.6%	3.5%	2.7%	0.8%	0.5%	1.3%
Other Intl	26.0%	27.6%	18.7%	12.5%	7.2%	3.6%	1.7%	1.2%	0.7%	0.8%

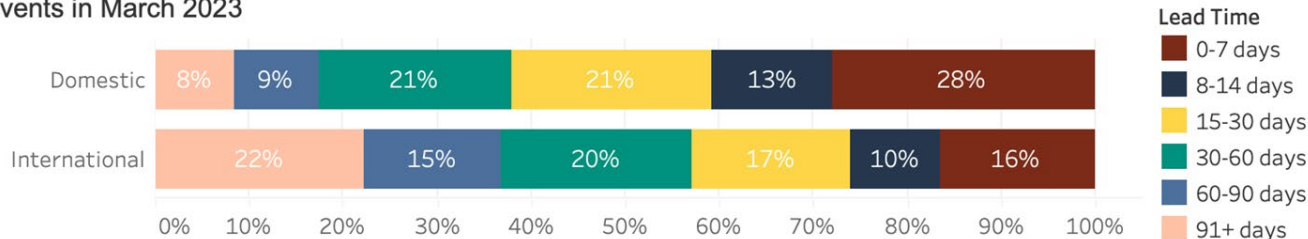
- Europeans are more likely to book trips early for summer and even Christmas holidays

Understanding Lead Times

How far ahead do travelers book their trips?

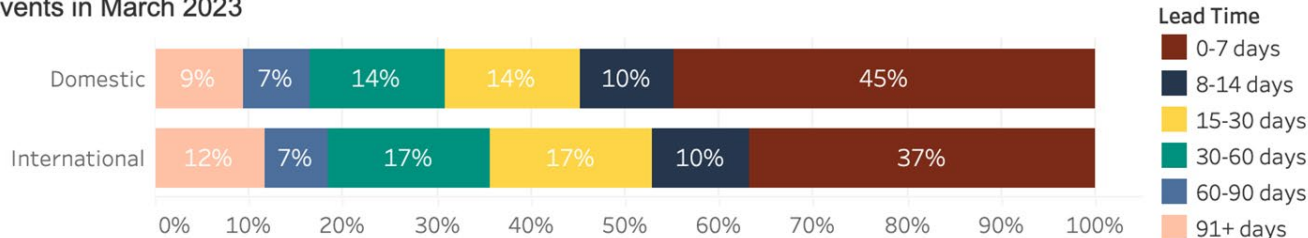
Flight BOOKING - Lead Time

Events in March 2023



Lodging BOOKING - Lead Time

Events in March 2023



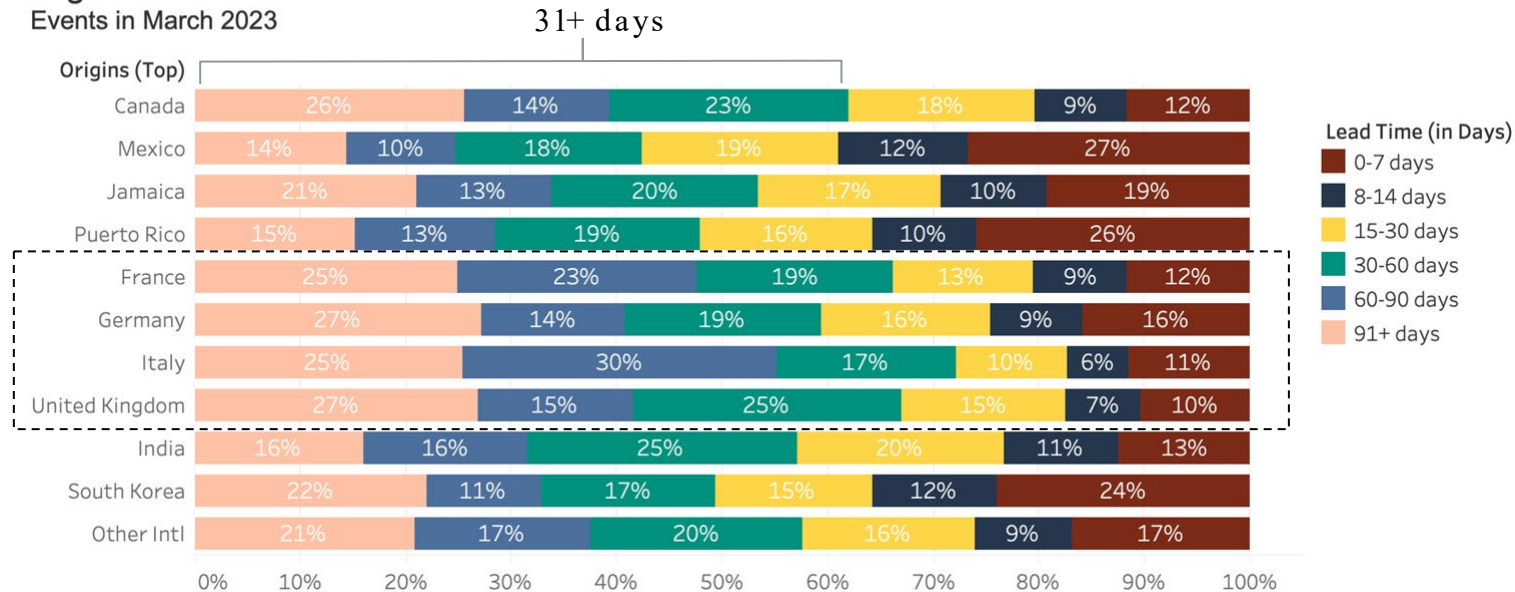
- Travelers typically book their flights further in advance than lodging

Understanding Lead Times

How far ahead do travelers book their flights?

Flight BOOKING - Lead Time

Events in March 2023



- Europeans commit to trips further in advance compared to nearby locations in the Americas. Surprisingly, India and South Korea do not exhibit longer lead times, given their distance

An aerial photograph of a beach scene. The foreground is filled with numerous colorful beach umbrellas in shades of green, yellow, and blue. A diagonal line of blue and white patterned umbrellas stretches from the top center towards the water. The beach is sandy and populated with people, some sitting and some walking. The ocean is visible on the right side, with gentle waves washing onto the shore. The overall scene is bright and sunny, typical of a popular beach destination.

A Look at Competitive Destinations

Top Destination Metros

Top Destination Metros -

Date range: Q1 (Jan - Mar)

Rank	2023
1	Atlanta, GA, 13.8%
2	Nashville, TN, 8.2%
3	Washington, DC (Hagerstown, MD), 7.5%
4	Charlotte, NC, 5.6%
5	New Orleans, LA, 5.6%
6	Savannah, GA, 4.2%
7	Raleigh-Durham (Fayetteville), NC, 4.2%
8	Norfolk-Portsmouth-Newport News, VA, 3.3%
9	St. Louis, MO, 3.1%
10	Charleston, SC, 2.8%

Lodging BOOKING

Rank	2022
1	Atlanta, GA, 13.1%
2	Nashville, TN, 8.8%
3	Washington, DC (Hagerstown, MD), 6.3%
4	Charlotte, NC, 5.6%
5	New Orleans, LA, 5.3%
6	Savannah, GA, 4.4%
7	Raleigh-Durham (Fayetteville), NC, 4.3%
8	Norfolk-Portsmouth-Newport News, VA, 3.4%
9	Charleston, SC, 2.9%
10	St. Louis, MO, 2.9%

Market share for domestic travel into US Travel South destinations saw no major changes vs. 2022

No change in top 8 metros

Top Competitive Destinations (Metros)

Original Destination City: **ATLANTA**

1	ORLANDO, FLORIDA (UNITED STATES)
2	NEW YORK CITY, NEW YORK (UNITED STATES)
3	MIAMI, FLORIDA (UNITED STATES)
4	LAS VEGAS, NEVADA (UNITED STATES)
5	CHICAGO, ILLINOIS (UNITED STATES)
6	FORT LAUDERDALE, FLORIDA (UNITED STATES)
7	LOS ANGELES, CALIFORNIA (UNITED STATES)
8	HOUSTON, TEXAS (UNITED STATES)
9	DALLAS, TEXAS (UNITED STATES)
10	DENVER, COLORADO (UNITED STATES)
11	NEWARK, NEW JERSEY (UNITED STATES)
12	TAMPA, FLORIDA (UNITED STATES)
13	SAN FRANCISCO, CALIFORNIA (UNITED STATES)
14	WASHINGTON, D.C., WASHINGTON, D.C. (UNITED STATES)
15	PHILADELPHIA, PENNSYLVANIA (UNITED STATES)
16	CHARLOTTE, NORTH CAROLINA (UNITED STATES)
17	BOSTON, MASSACHUSETTS (UNITED STATES)
18	PHOENIX, ARIZONA (UNITED STATES)
19	NASHVILLE, TENNESSEE (UNITED STATES)
20	DETROIT, MICHIGAN (UNITED STATES)

Original Destination City: **NASHVILLE**

1	ORLANDO, FLORIDA (UNITED STATES)
2	LAS VEGAS, NEVADA (UNITED STATES)
3	TAMPA, FLORIDA (UNITED STATES)
4	ATLANTA, GEORGIA (UNITED STATES)
5	NEW YORK CITY, NEW YORK (UNITED STATES)
6	DENVER, COLORADO (UNITED STATES)
7	LOS ANGELES, CALIFORNIA (UNITED STATES)
8	CHICAGO, ILLINOIS (UNITED STATES)
9	FORT LAUDERDALE, FLORIDA (UNITED STATES)
10	NEWARK, NEW JERSEY (UNITED STATES)
11	MIAMI, FLORIDA (UNITED STATES)
12	SAN FRANCISCO, CALIFORNIA (UNITED STATES)
13	BOSTON, MASSACHUSETTS (UNITED STATES)
14	PHOENIX, ARIZONA (UNITED STATES)
15	WASHINGTON, D.C., WASHINGTON, D.C. (UNITED STATES)
16	HOUSTON, TEXAS (UNITED STATES)
17	DALLAS, TEXAS (UNITED STATES)
18	PHILADELPHIA, PENNSYLVANIA (UNITED STATES)
19	AUSTIN, TEXAS (UNITED STATES)
20	SEATTLE, WASHINGTON (UNITED STATES)

Original Destination City: **CHARLOTTE**

1	ATLANTA, GEORGIA (UNITED STATES)
2	ORLANDO, FLORIDA (UNITED STATES)
3	NEW YORK CITY, NEW YORK (UNITED STATES)
4	RALEIGH, NORTH CAROLINA (UNITED STATES)
5	LAS VEGAS, NEVADA (UNITED STATES)
6	MIAMI, FLORIDA (UNITED STATES)
7	WASHINGTON, D.C., WASHINGTON, D.C. (UNITED STATES)
8	NEWARK, NEW JERSEY (UNITED STATES)
9	DENVER, COLORADO (UNITED STATES)
10	CHICAGO, ILLINOIS (UNITED STATES)
11	LOS ANGELES, CALIFORNIA (UNITED STATES)
12	FORT LAUDERDALE, FLORIDA (UNITED STATES)
13	BOSTON, MASSACHUSETTS (UNITED STATES)
14	PHILADELPHIA, PENNSYLVANIA (UNITED STATES)
15	HOUSTON, TEXAS (UNITED STATES)
16	SAN FRANCISCO, CALIFORNIA (UNITED STATES)
17	DALLAS, TEXAS (UNITED STATES)
18	ASHEVILLE, NORTH CAROLINA (UNITED STATES)
19	GREENVILLE, SOUTH CAROLINA (UNITED STATES)
20	TAMPA, FLORIDA (UNITED STATES)

Top Competitive Destinations (Metros)

Original Destination City: KANSAS CITY	
1	DENVER, COLORADO (UNITED STATES)
2	CHICAGO, ILLINOIS (UNITED STATES)
3	LAS VEGAS, NEVADA (UNITED STATES)
4	LOS ANGELES, CALIFORNIA (UNITED STATES)
5	ORLANDO, FLORIDA (UNITED STATES)
6	NEW YORK CITY, NEW YORK (UNITED STATES)
7	HOUSTON, TEXAS (UNITED STATES)
8	SAN FRANCISCO, CALIFORNIA (UNITED STATES)
9	DALLAS, TEXAS (UNITED STATES)
10	NEWARK, NEW JERSEY (UNITED STATES)
11	WASHINGTON, D.C., WASHINGTON, D.C. (UNITED STATES)
12	PHOENIX, ARIZONA (UNITED STATES)
13	MIAMI, FLORIDA (UNITED STATES)
14	ATLANTA, GEORGIA (UNITED STATES)
15	ST. LOUIS, MISSOURI (UNITED STATES)
16	TAMPA, FLORIDA (UNITED STATES)
17	BOSTON, MASSACHUSETTS (UNITED STATES)
18	SEATTLE, WASHINGTON (UNITED STATES)
19	MINNEAPOLIS, MINNESOTA (UNITED STATES)
20	FORT LAUDERDALE, FLORIDA (UNITED STATES)

Original Destination City: ST. LOUIS	
1	CHICAGO, ILLINOIS (UNITED STATES)
2	LAS VEGAS, NEVADA (UNITED STATES)
3	ORLANDO, FLORIDA (UNITED STATES)
4	DENVER, COLORADO (UNITED STATES)
5	NEW YORK CITY, NEW YORK (UNITED STATES)
6	SAN FRANCISCO, CALIFORNIA (UNITED STATES)
7	LOS ANGELES, CALIFORNIA (UNITED STATES)
8	NEWARK, NEW JERSEY (UNITED STATES)
9	ATLANTA, GEORGIA (UNITED STATES)
10	WASHINGTON, D.C., WASHINGTON, D.C. (UNITED STATES)
11	TAMPA, FLORIDA (UNITED STATES)
12	HOUSTON, TEXAS (UNITED STATES)
13	KANSAS CITY, MISSOURI (UNITED STATES)
14	DALLAS, TEXAS (UNITED STATES)
15	MIAMI, FLORIDA (UNITED STATES)
16	BOSTON, MASSACHUSETTS (UNITED STATES)
17	PHOENIX, ARIZONA (UNITED STATES)
18	FORT LAUDERDALE, FLORIDA (UNITED STATES)
19	SEATTLE, WASHINGTON (UNITED STATES)
20	NASHVILLE, TENNESSEE (UNITED STATES)

What can you do to influence travelers?

Inspire Travelers Before They Book



Focus on intent (prospecting) data to inspire travelers before they've decided where to go.

Promote Destination Values



Ensure you are communicating efforts around sustainable travel with messaging that speaks to all audiences

Promote Longer Trips



Encourage travelers to stay longer by sharing activities and restaurants in area, even local grocery stores.

Keep Safety Protocols Front & Center (COVID-19 Surge)



Share updates on policies. If masks aren't required, let them know - especially important for international travelers.

Remain Always On



Travelers are always searching for their next trip and you need to be there when they are.



▶ **Thank You**

Questions?