

THE STATE OF THE GLOBAL INTERNATIONAL TRAVELER

Destination  Analysts

Destination Analysts



METHODOLOGY

- **Online survey of international travelers in 15 top feeder markets to the United States**
- **800+ surveys per market; 12,000 total surveys collected**
- **Examines sentiment, media consumption, perceptions, travel desires and behaviors, as well as the brand performance of over 65 destinations**
- **Conducted since 2014. 2023 survey fielded January 26th – February 7th, 2023**



MARKETS OF STUDY



CANADA



MEXICO



COLOMBIA



BRAZIL



ARGENTINA



UNITED KINGDOM



FRANCE



NETHERLANDS



GERMANY



ITALY



INDIA



CHINA



SOUTH KOREA



JAPAN

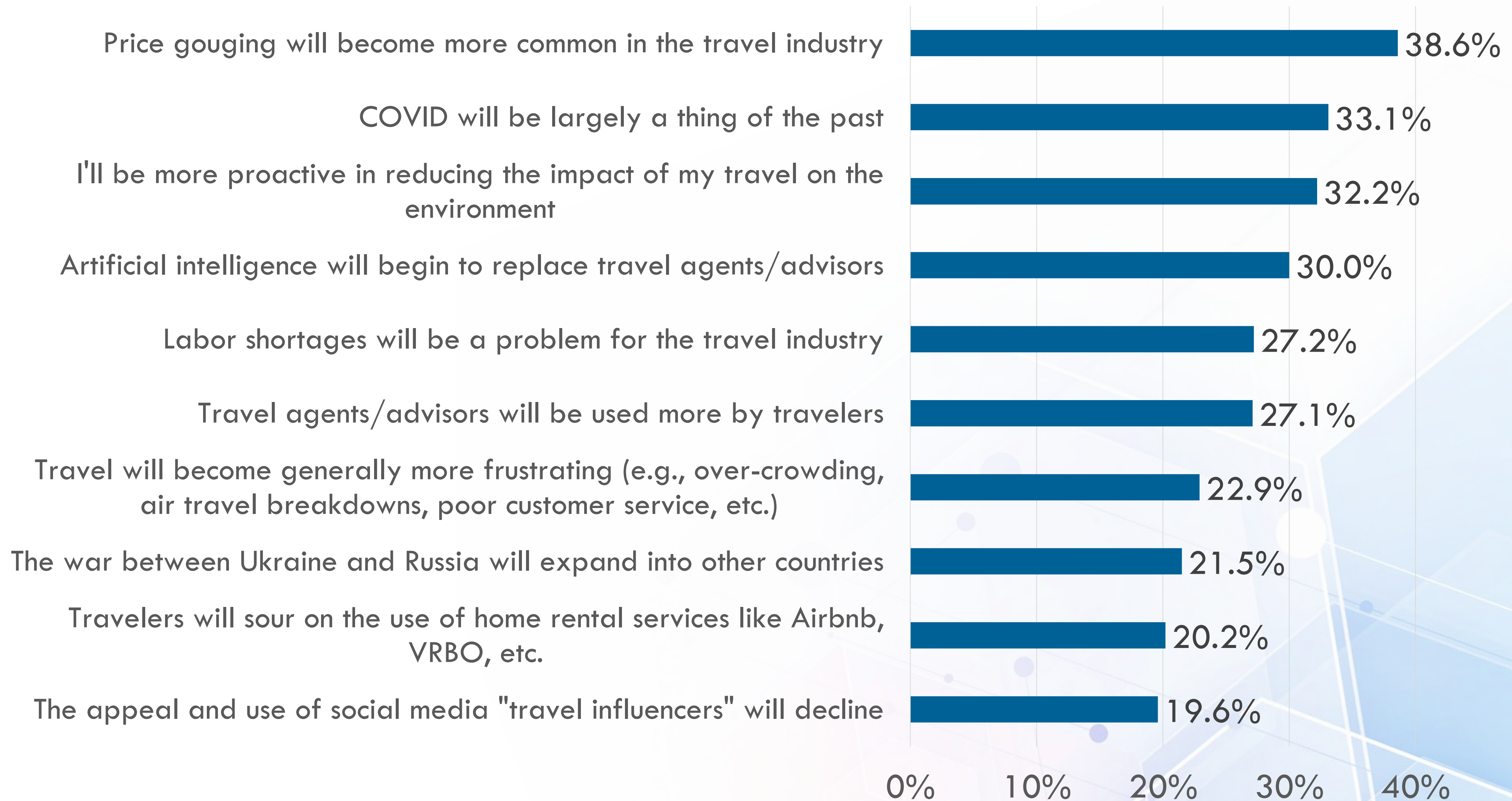


AUSTRALIA



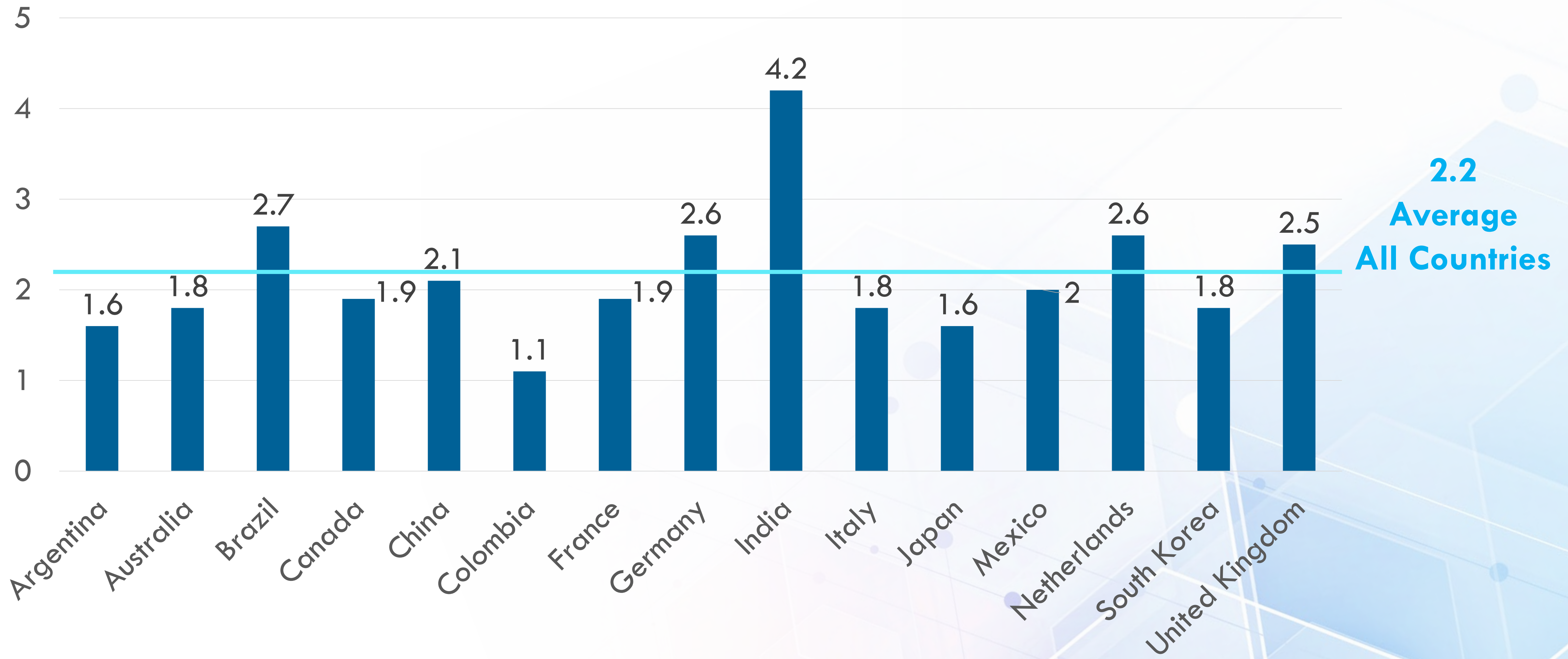
GLOBAL TRAVEL SENTIMENT

WHAT ARE GLOBAL TRAVELERS PREDICTING?



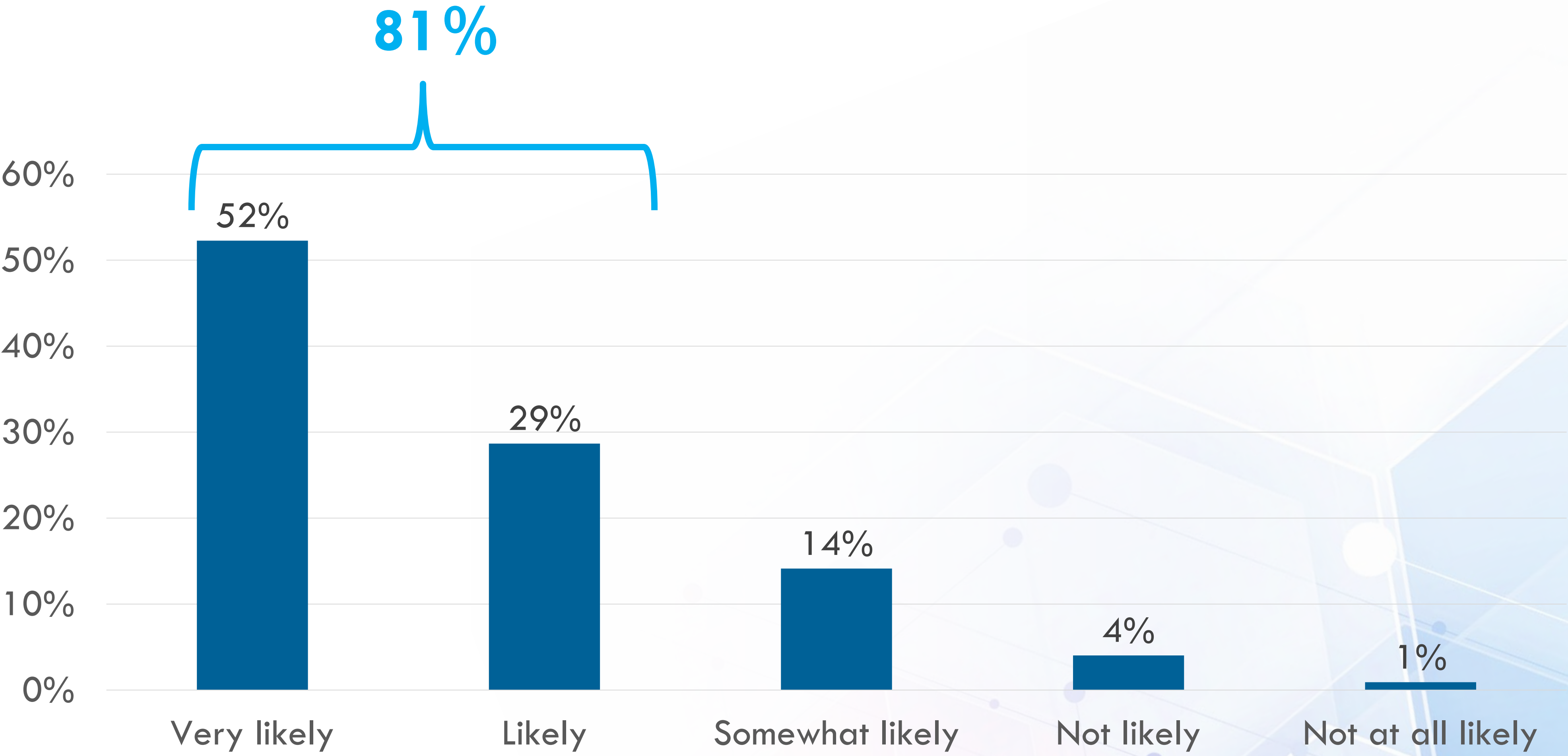
Q. Thinking about how 2023 will evolve, how likely do you think each of the following will be? (Please use the scale below to give us your best guess for each?)

NUMBER OF TRIPS



Q. How many of these leisure trips included travel outside your country? (Average)

LIKELIHOOD TO TRAVEL INTERNATIONALLY THIS YEAR



Q. How likely are you to travel for leisure to any foreign countries outside your country in the NEXT 12 MONTHS?

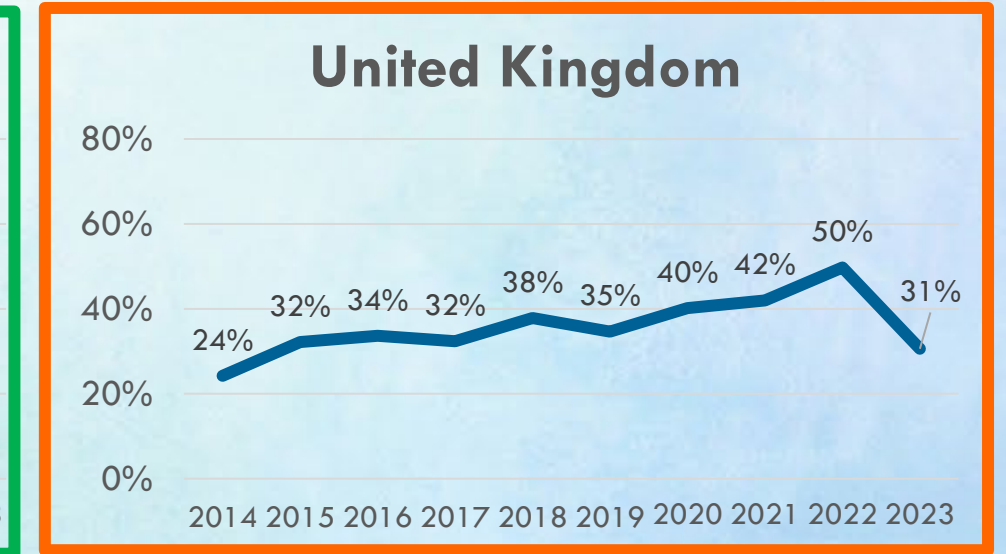
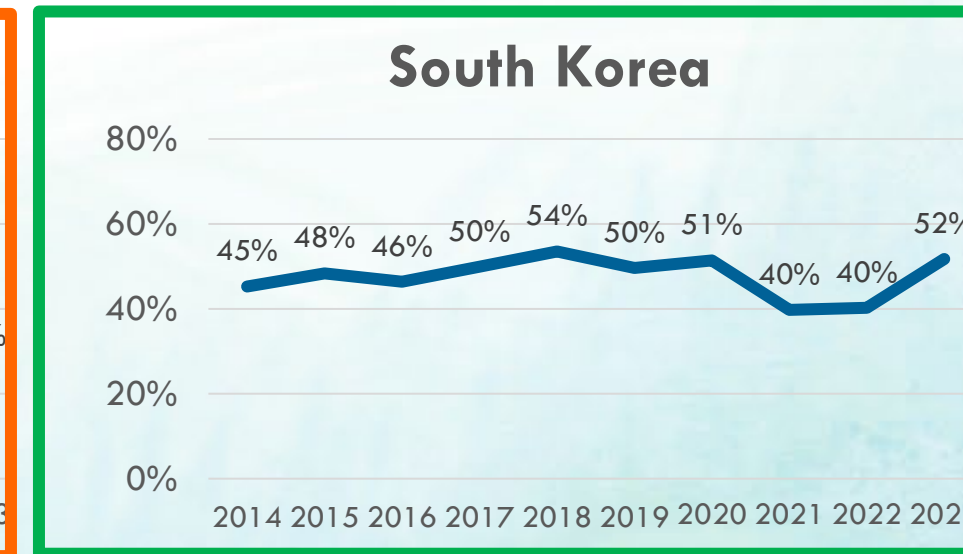
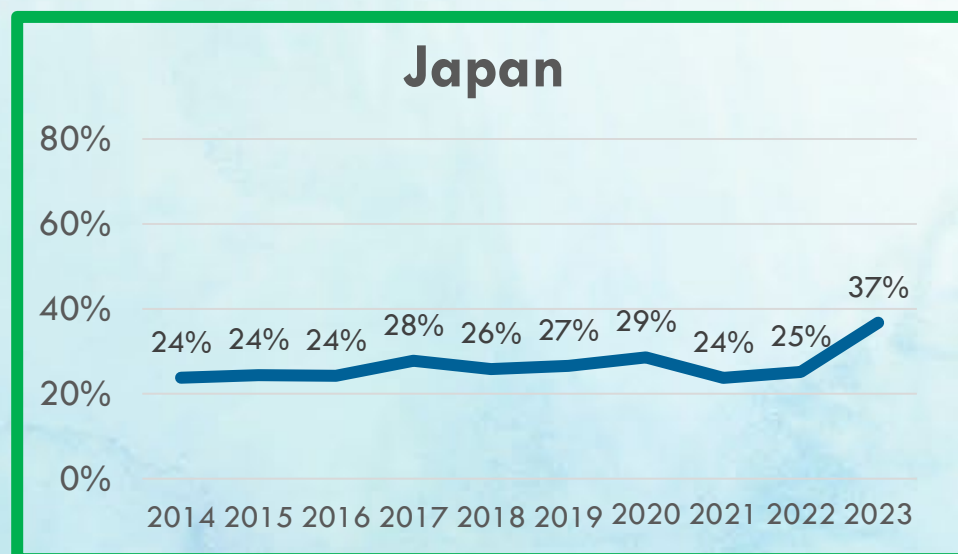
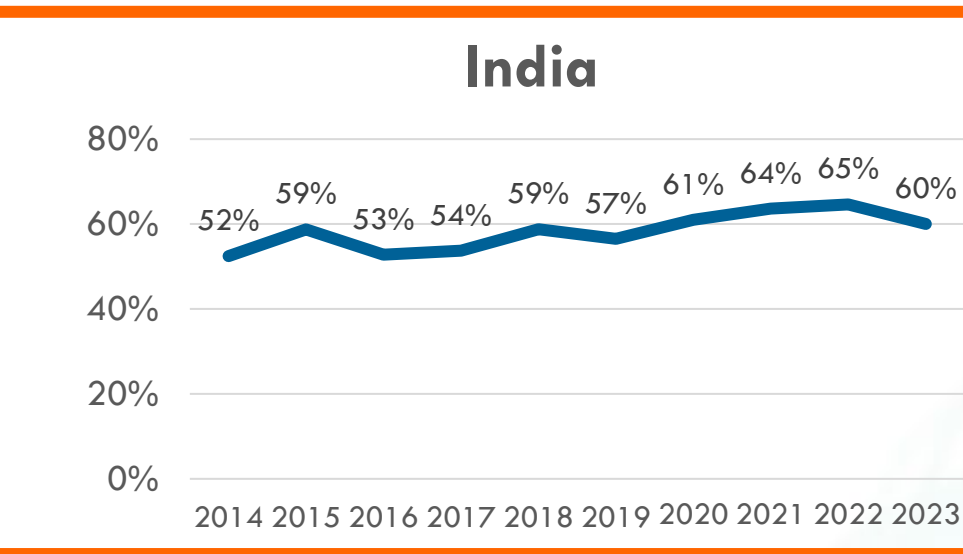
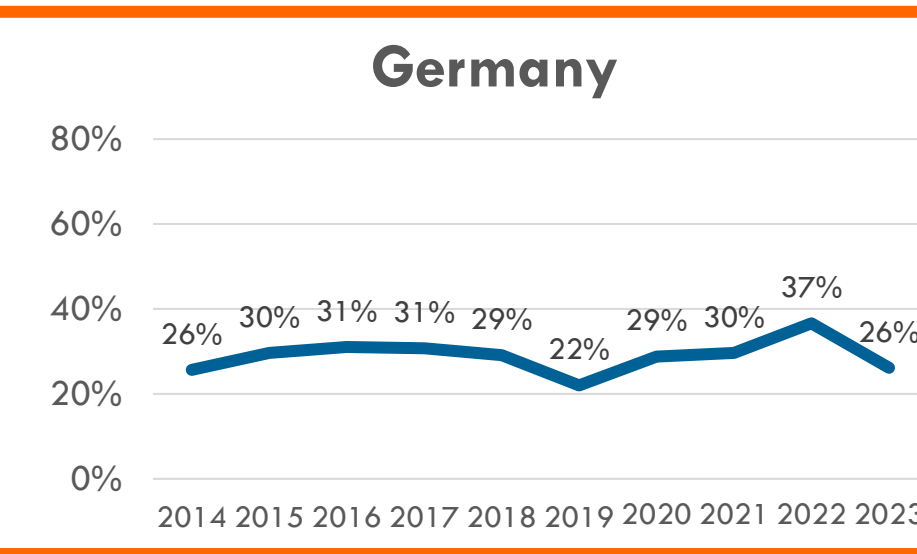
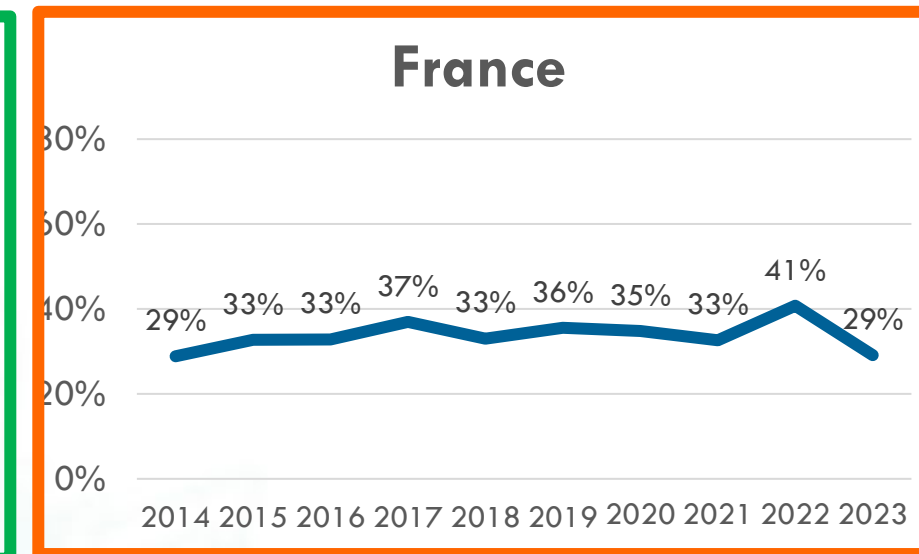
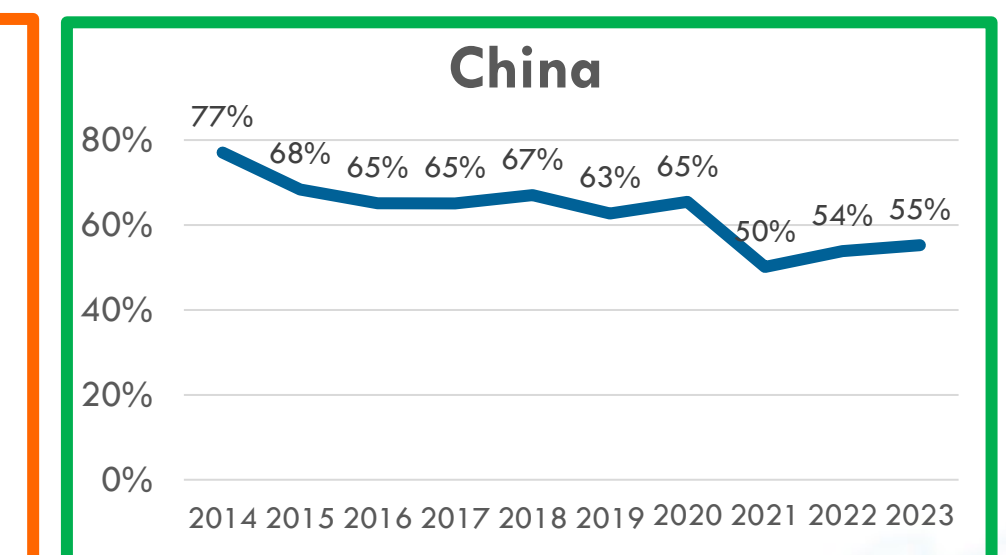
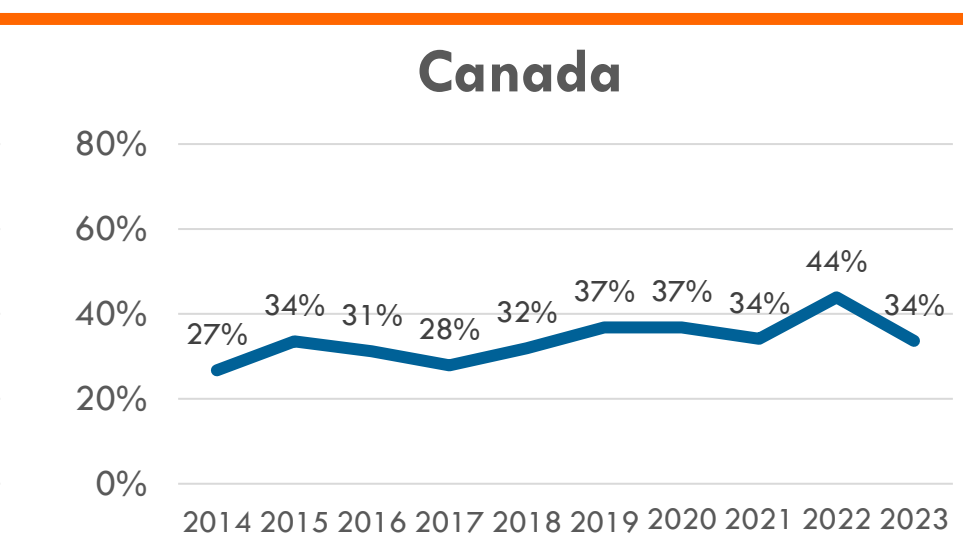
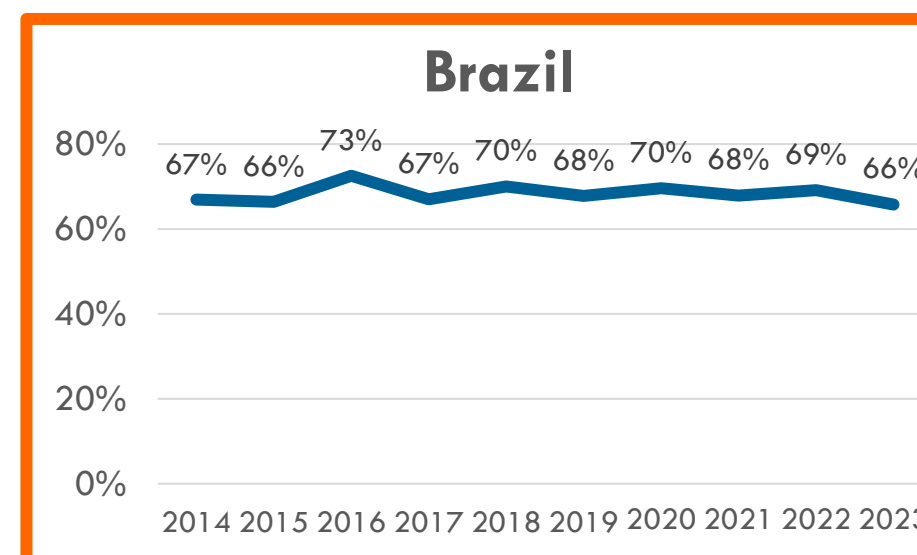
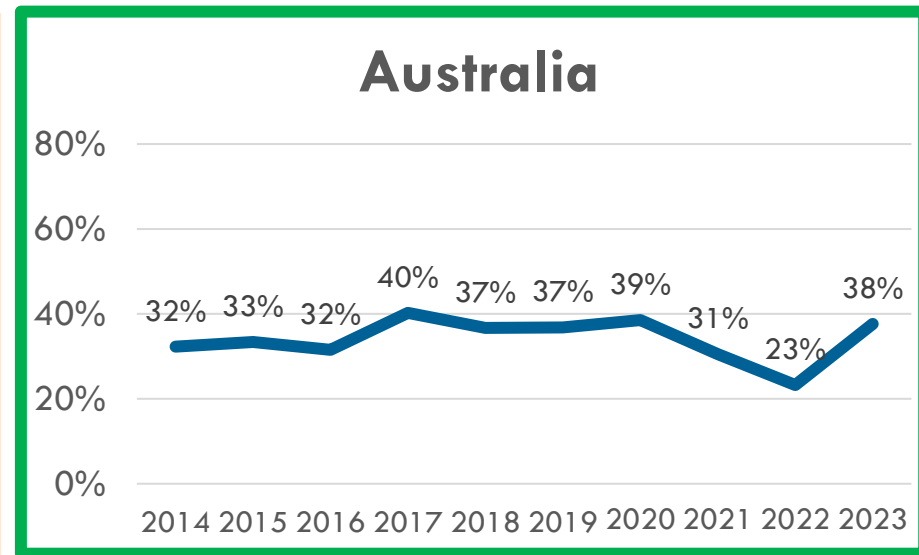
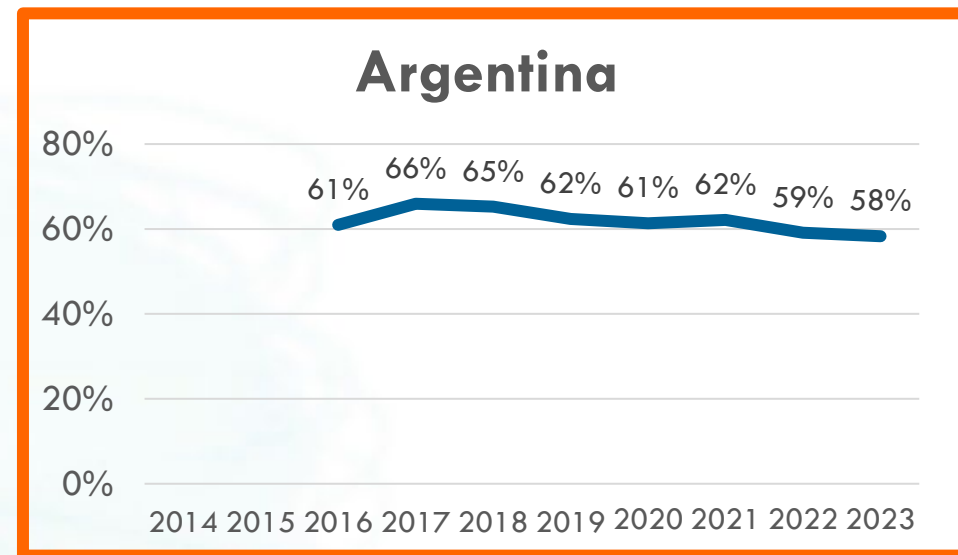
TRAVEL VOLUME & SPENDING EXPECTATIONS

Global Travel Sentiment: 2014—2023



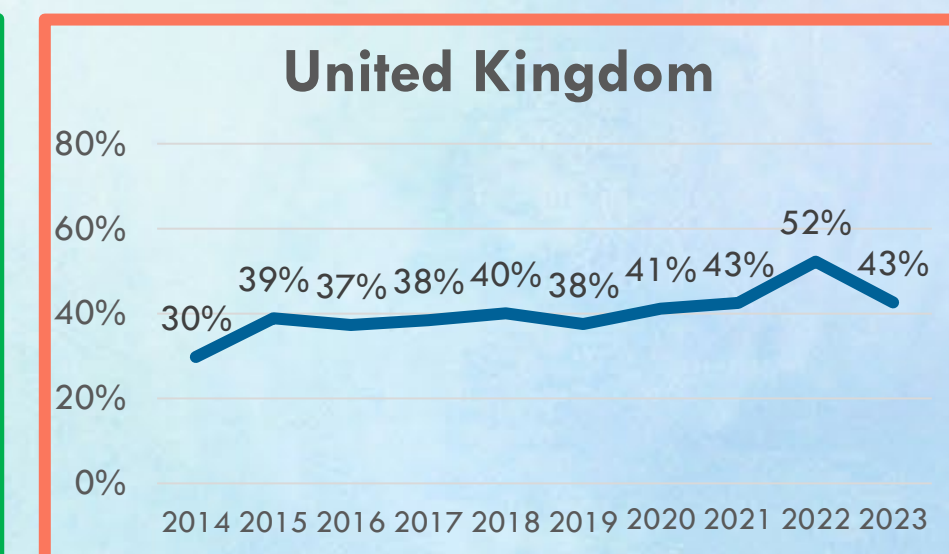
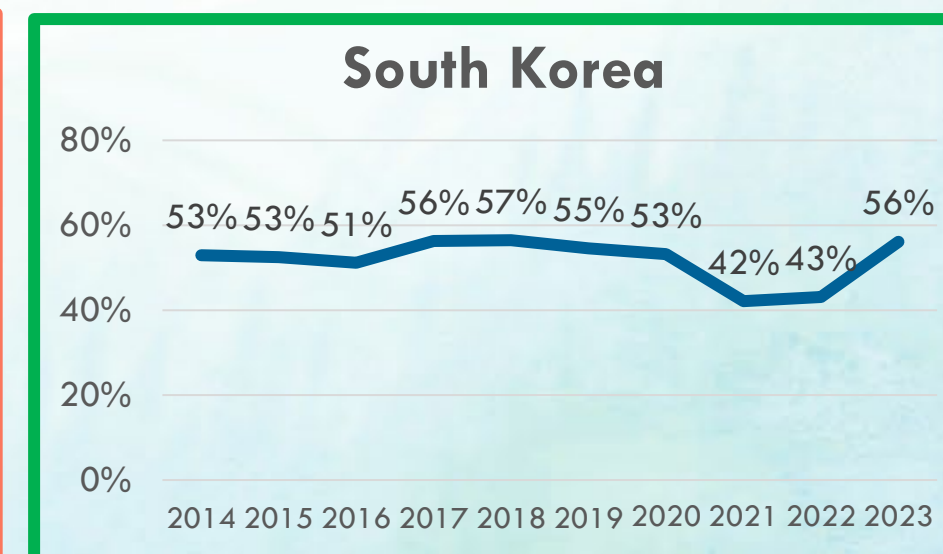
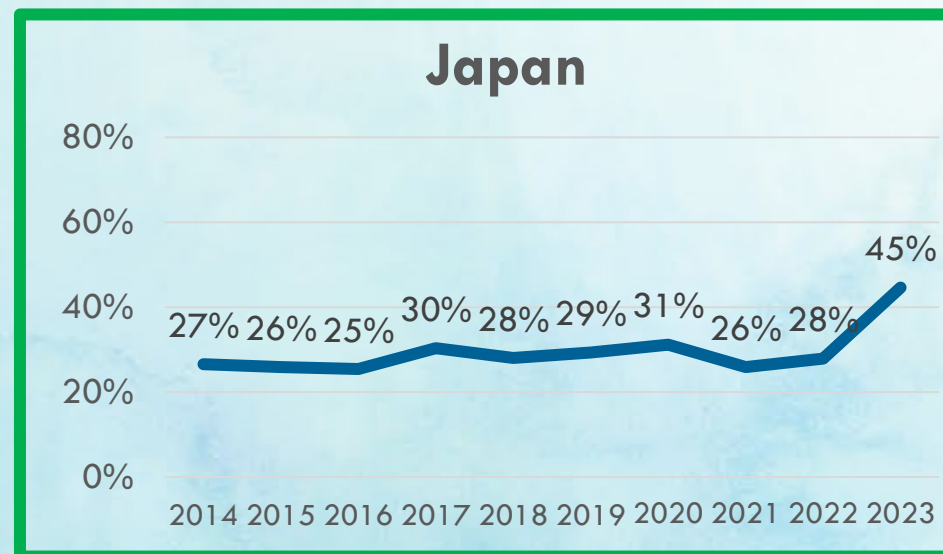
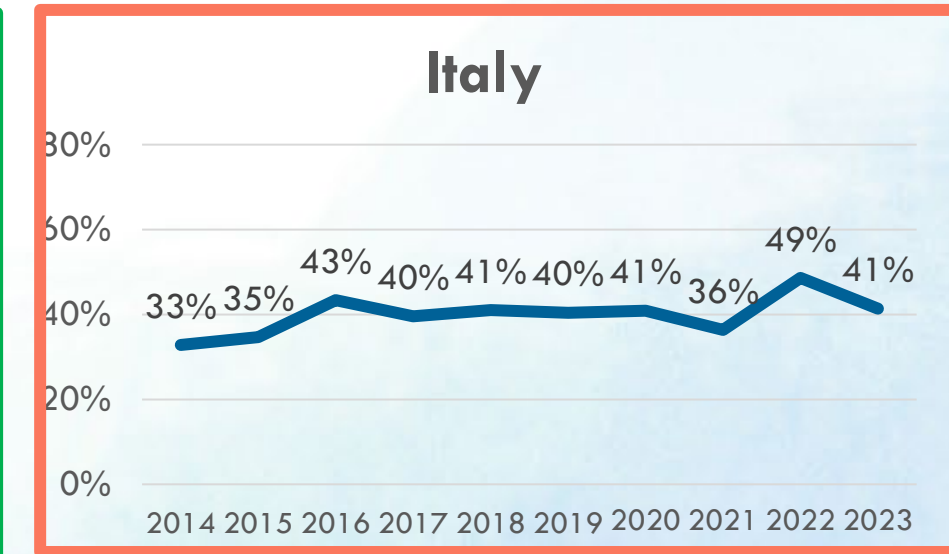
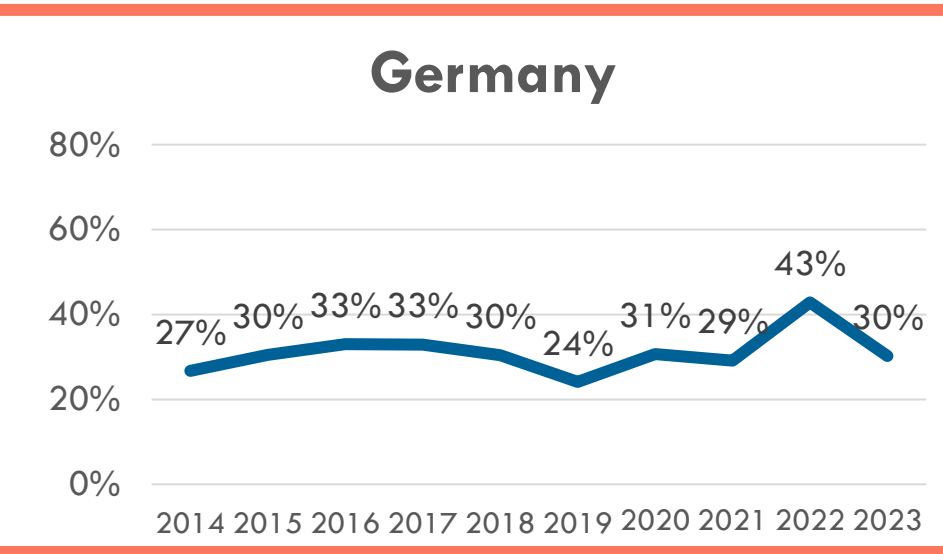
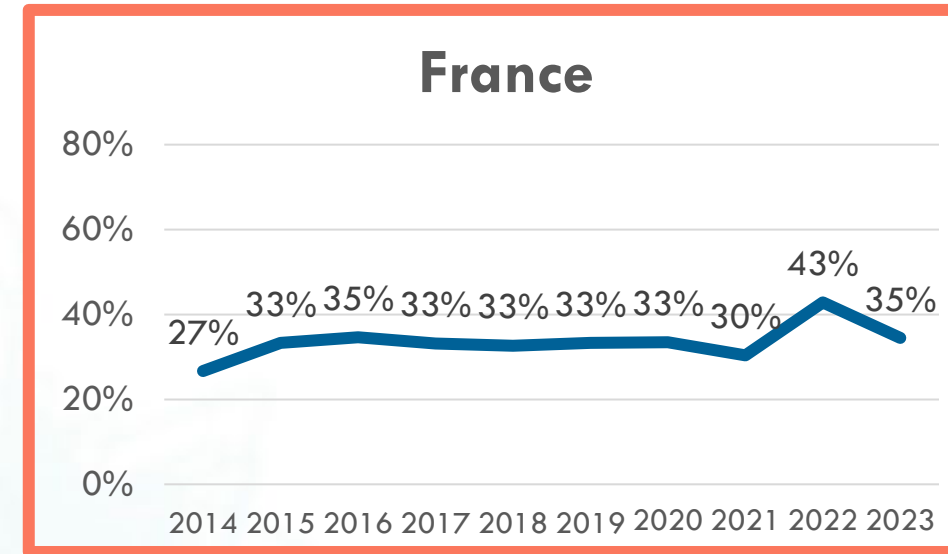
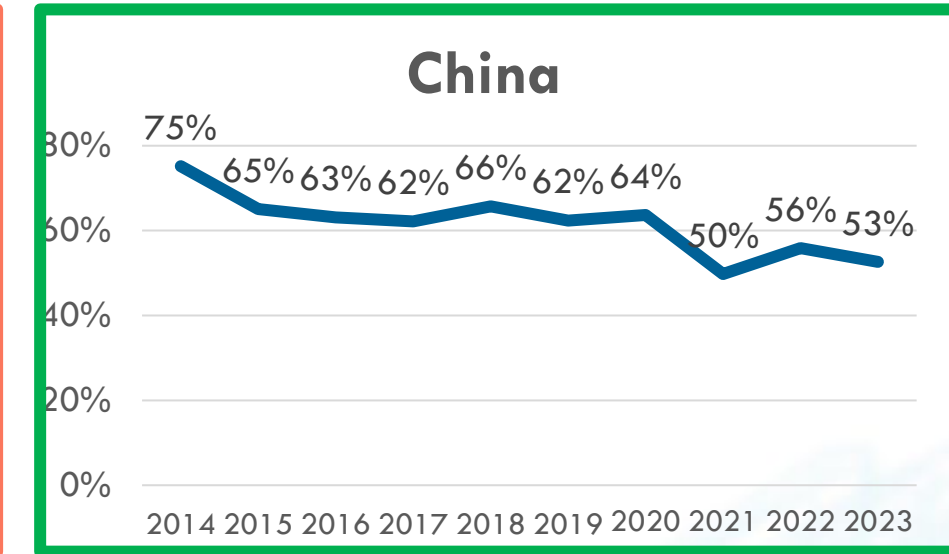
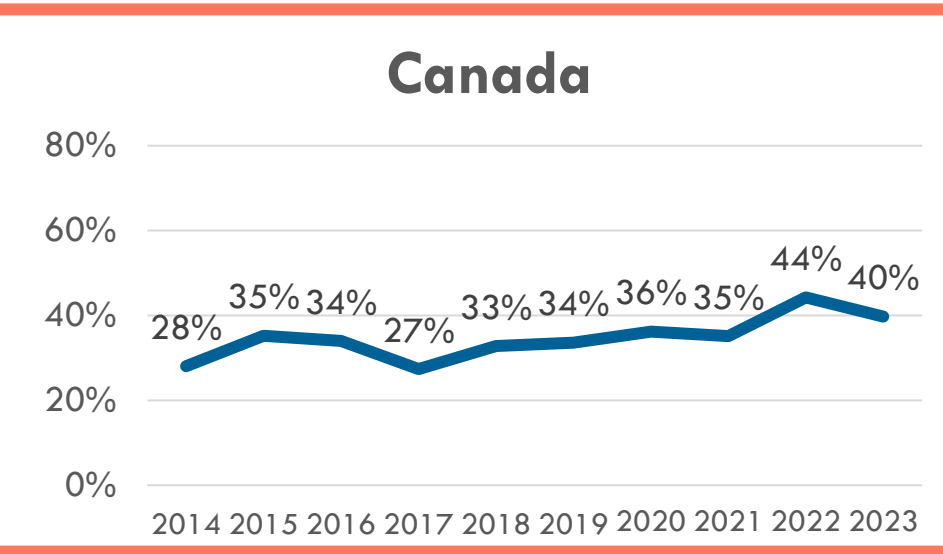
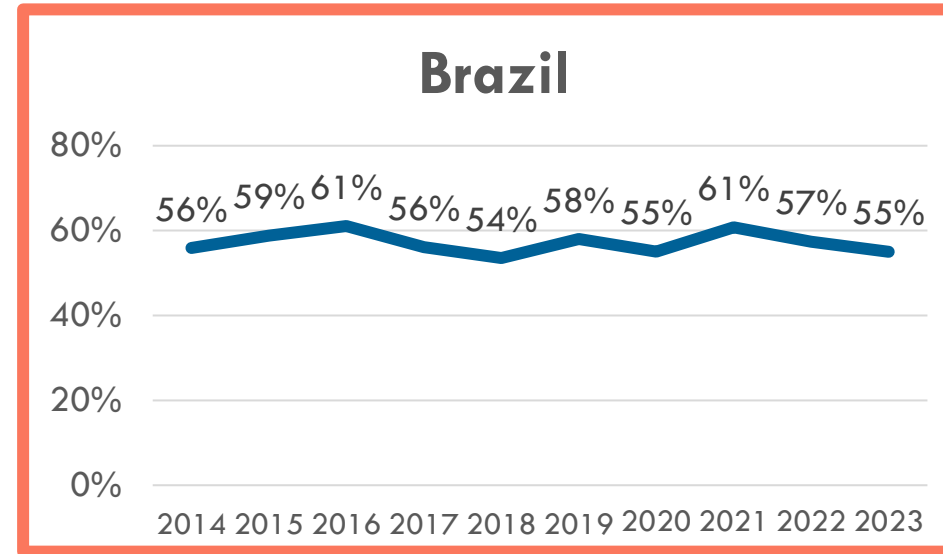
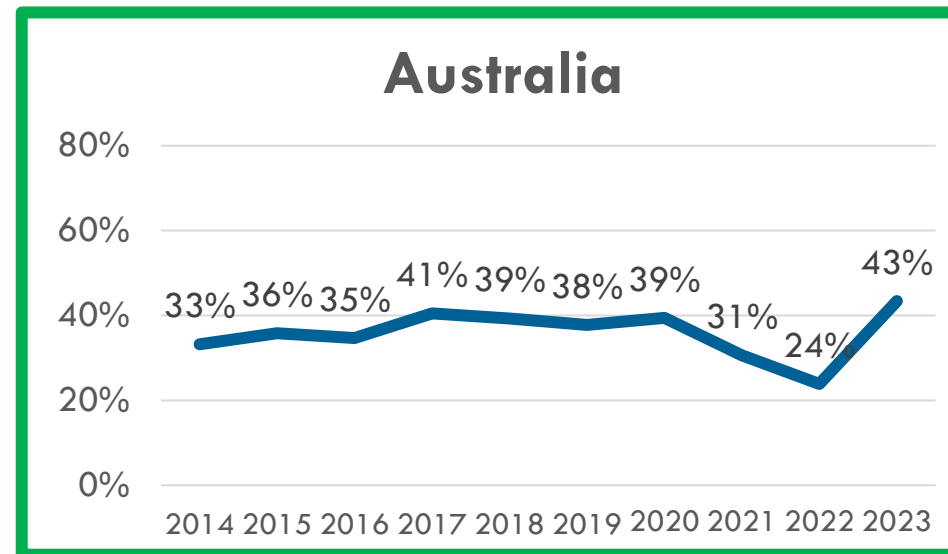
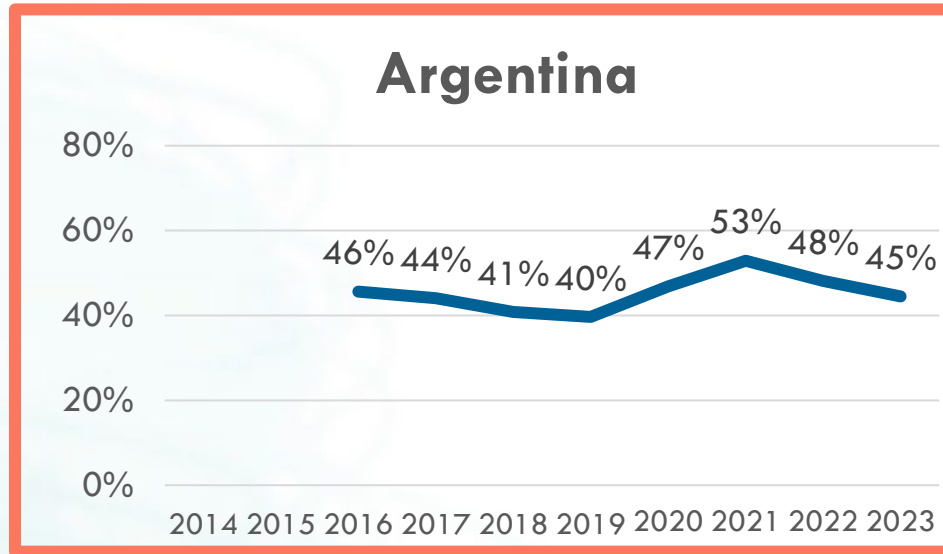
Q. In the next 12 months, do you expect to take more, fewer or the same number of INTERNATIONAL LEISURE TRIPS than you did in the most recent 12 month period?
Q. In the next 12 months, do you expect to spend more, less or the same on INTERNATIONAL LEISURE TRAVEL than you did in the most recent 12 month period?

INTERNATIONAL TRIP VOLUME BY MARKET 2014-2023



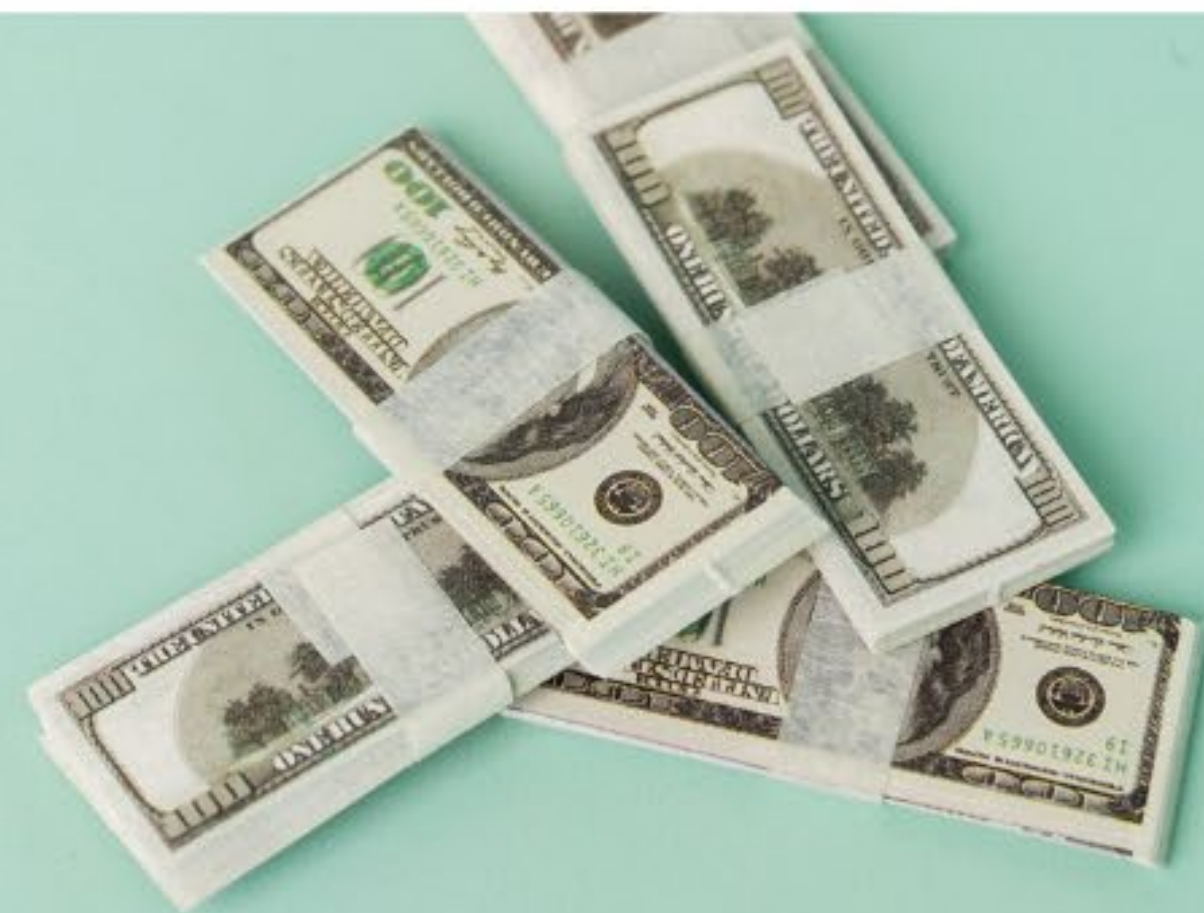
Q. In the next 12 months, do you expect to take more, fewer or the same number of INTERNATIONAL LEISURE TRIPS than you did in the most recent 12 month period?

INTERNATIONAL TRIP SPENDING BY MARKET 2014-2023

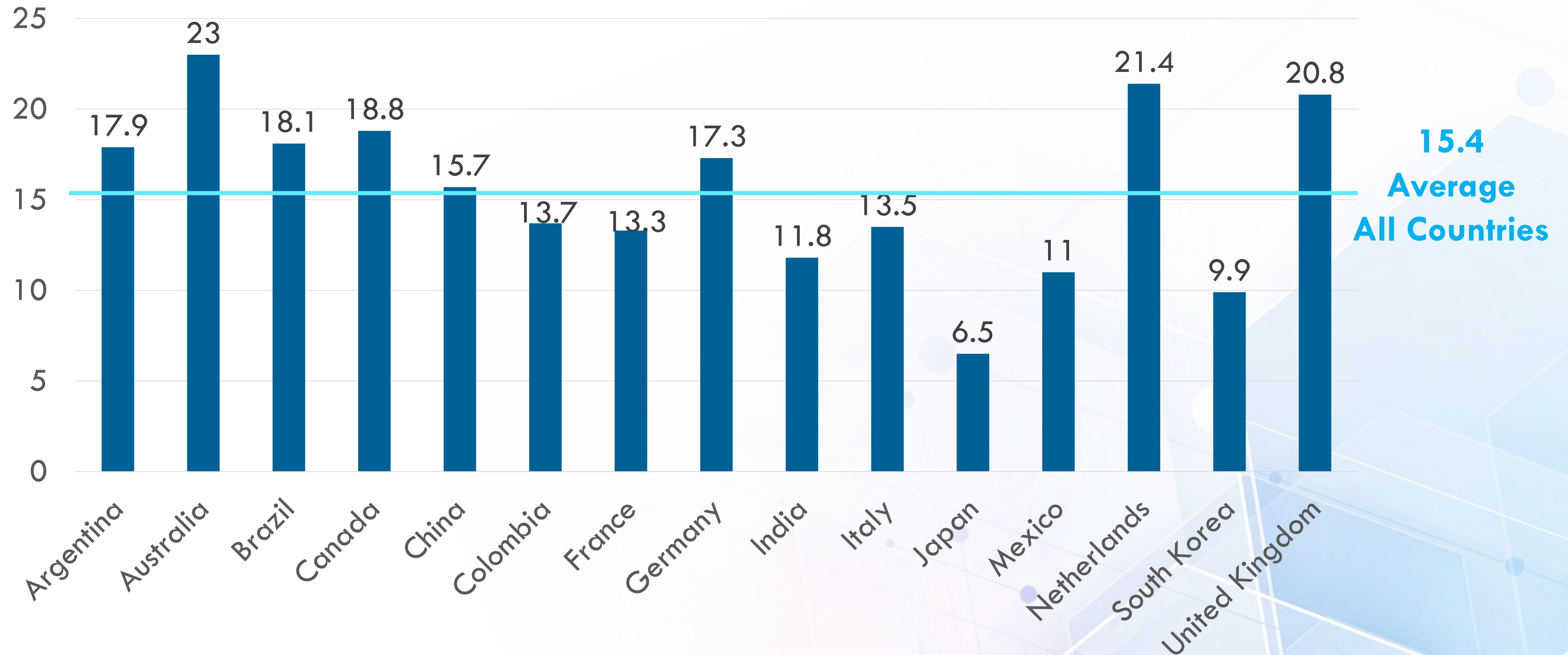


Q. In the next 12 months, do you expect to spend more, less or the same on INTERNATIONAL LEISURE TRAVEL than you did in the most recent 12 month period?

HOW IS THE ECONOMY
IMPACTING TRAVEL SENTIMENT?

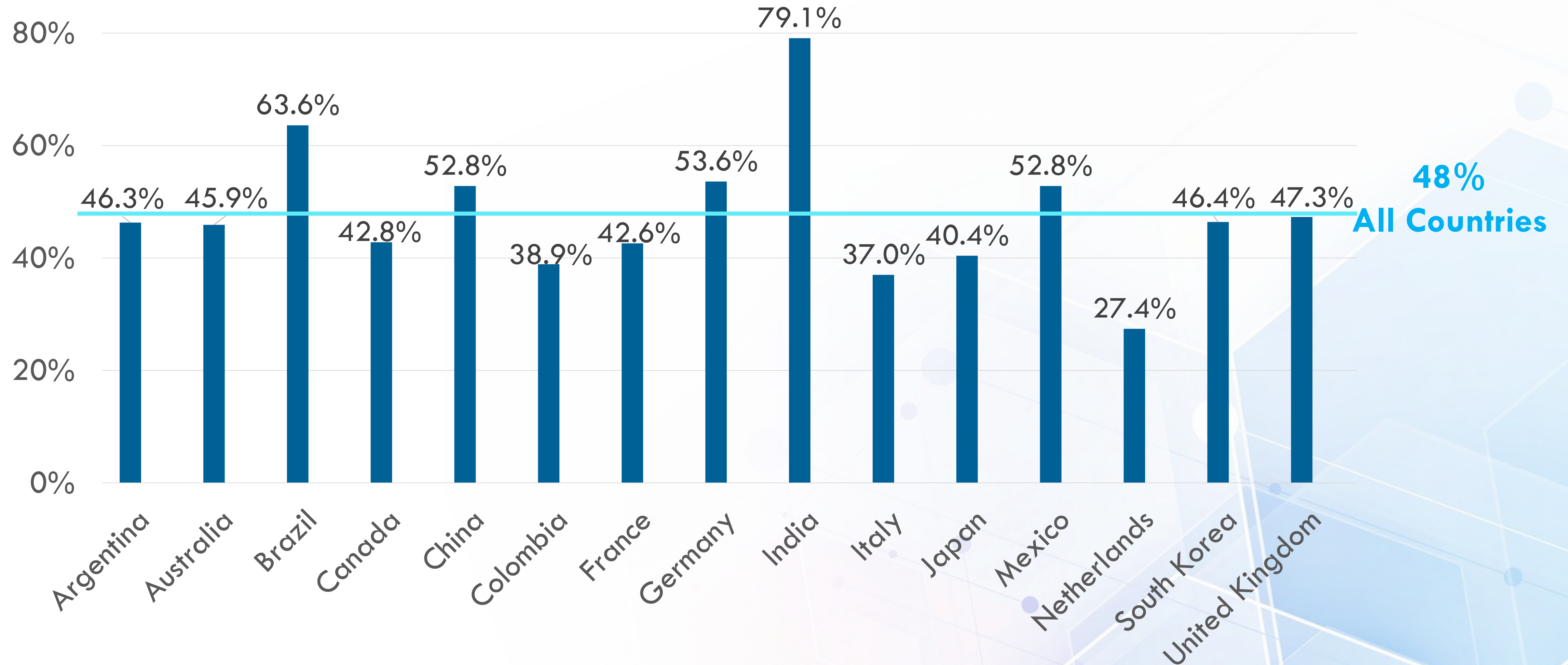


DAYS COMMITTED FOR INTERNATIONAL TRAVEL



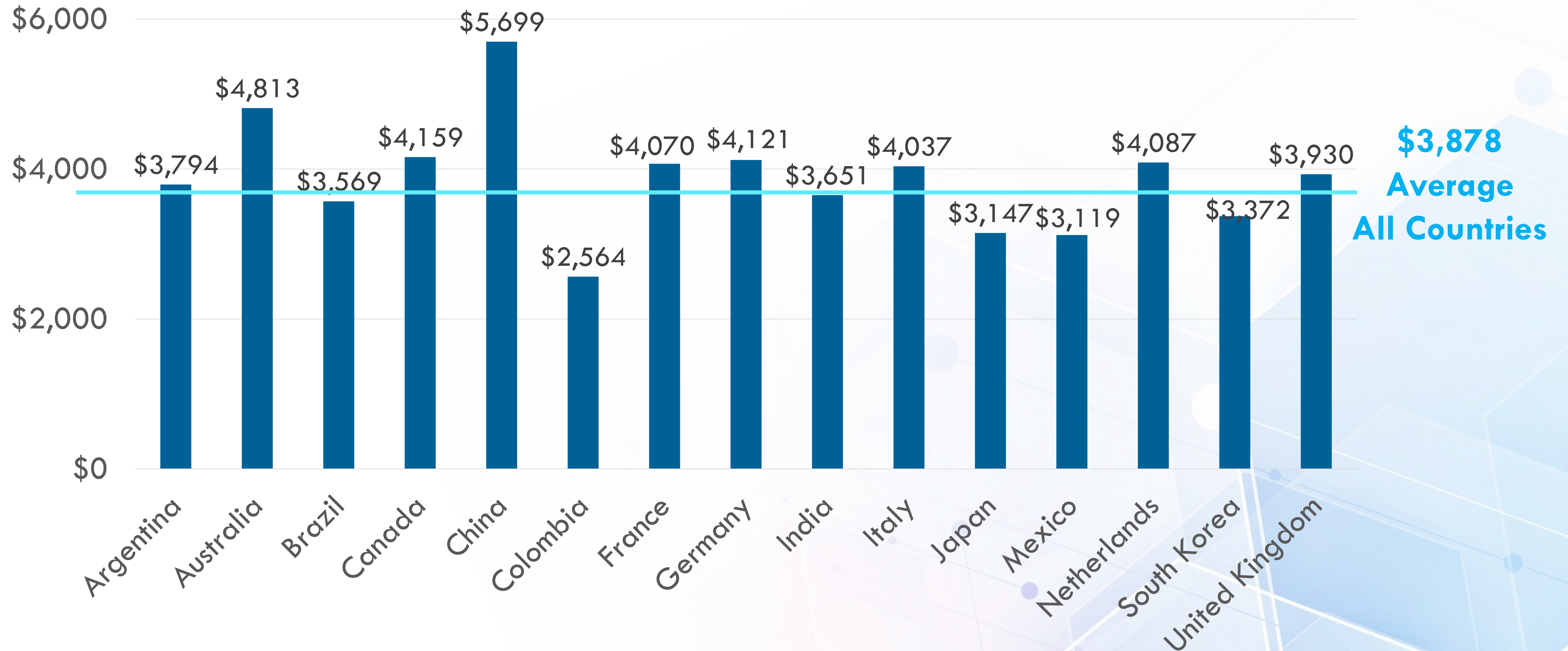
Q. How many days in the NEXT TWELVE (12) MONTHS will you realistically have available for international leisure travel?

INTERNATIONAL TRAVEL AS A BUDGET PRIORITY



Q. Thinking carefully about how you expect to spend your income in the NEXT 12 MONTHS, please use the scale below to describe your spending priorities in the next year. (Select one) International leisure travel will be
Top 2 Box Responses: "extremely high priority" or "high priority"

MAXIMUM BUDGET FOR INTERNATIONAL LEISURE TRAVEL

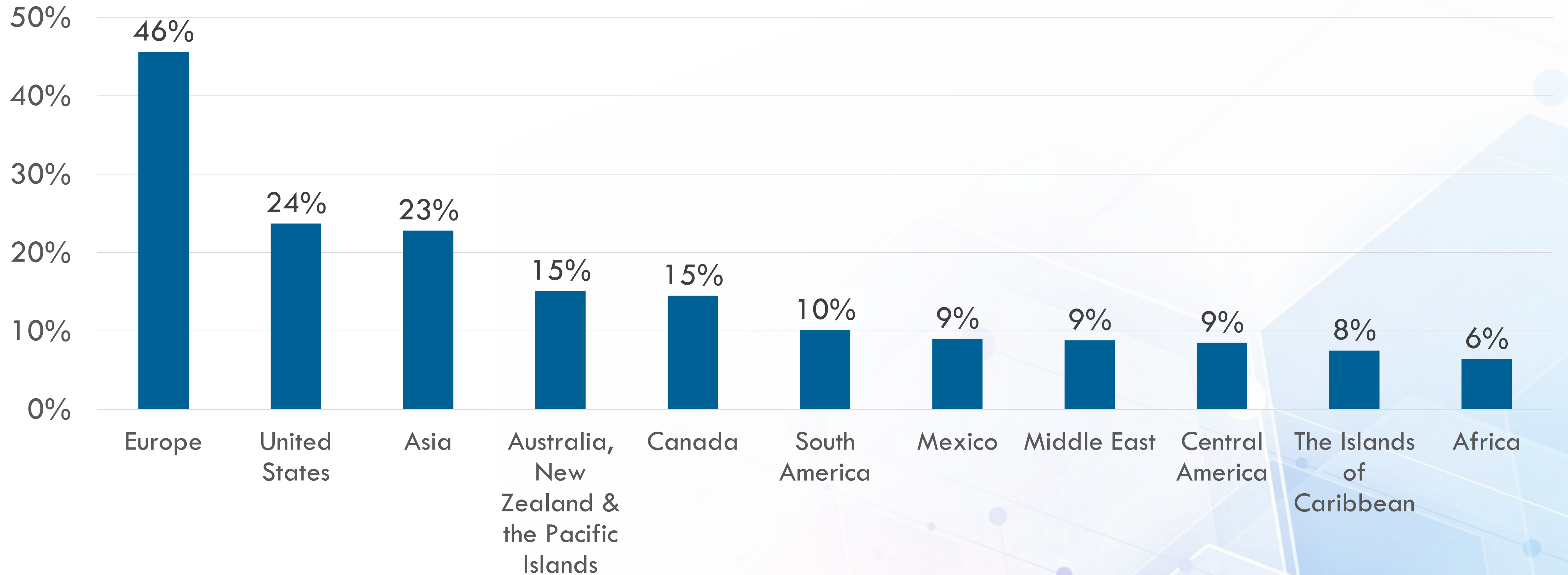


Q. How much in total is the maximum you would be likely to spend on international leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS? (Average)

An aerial photograph of a vibrant, terraced hillside town, likely Positano in Italy. The buildings are painted in various colors like yellow, orange, and white, and are built into the steep slope. In the foreground, there are bright pink flowers. The sky is a clear, bright blue with a few white clouds. A semi-transparent dark blue banner with a white border is centered over the image, containing the text 'MOST DESIRED INTERNATIONAL DESTINATIONS' in white, all-caps, sans-serif font.

MOST DESIRED
INTERNATIONAL DESTINATIONS

GLOBAL REGIONS OF TRAVEL INTEREST



Q. Which regions (outside your home country) are you likely to visit in the NEXT TWELVE (12) MONTHS?]



THE UNITED STATES BRAND

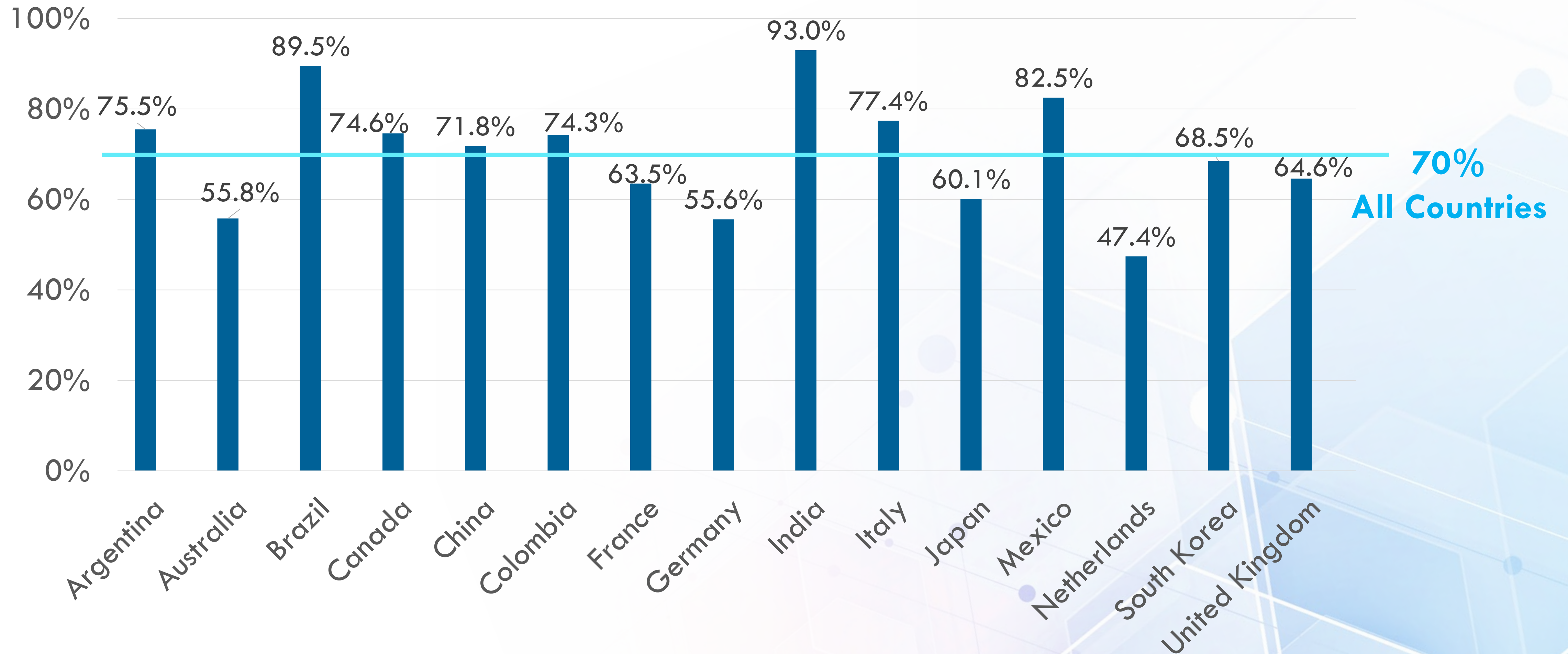
USA IN THE TOURISM CONSCIOUSNESS

43.4%

have seen tourism
promotions for
the USA recently.



INTEREST IN VISITING THE USA SOON



Q. How interested are you in visiting the United States of America in the next TWO YEARS?

LIKELIHOOD TO VISIT THE USA

Overall Likelihood of Visiting the USA in Next Two Years (All Countries)

	2018	2019	2020	2021	2022	2023	% CHNG 2022-2023
Top 2 Box Score	45.9%	44.1%	44.2%	47.2%	51.0%	49.2%	-3.5%
Will certainly visit	22.4%	21.6%	21.4%	22.3%	23.9%	22.4%	-6.3%
Very likely	23.5%	22.5%	22.8%	24.8%	27.0%	26.8%	-0.7%
Somewhat likely	26.2%	25.2%	27.4%	25.7%	24.0%	26.2%	9.2%
Somewhat unlikely	13.8%	14.6%	14.4%	12.7%	11.5%	12.4%	7.8%
Very unlikely	8.3%	8.6%	8.1%	7.3%	6.6%	6.8%	3.0%
Will not visit	5.7%	7.5%	5.9%	7.2%	6.9%	5.4%	-21.7%

Q. How likely are you to travel for leisure to the United States of America in the next TWO YEARS?

LIKELIHOOD TO VISIT THE USA

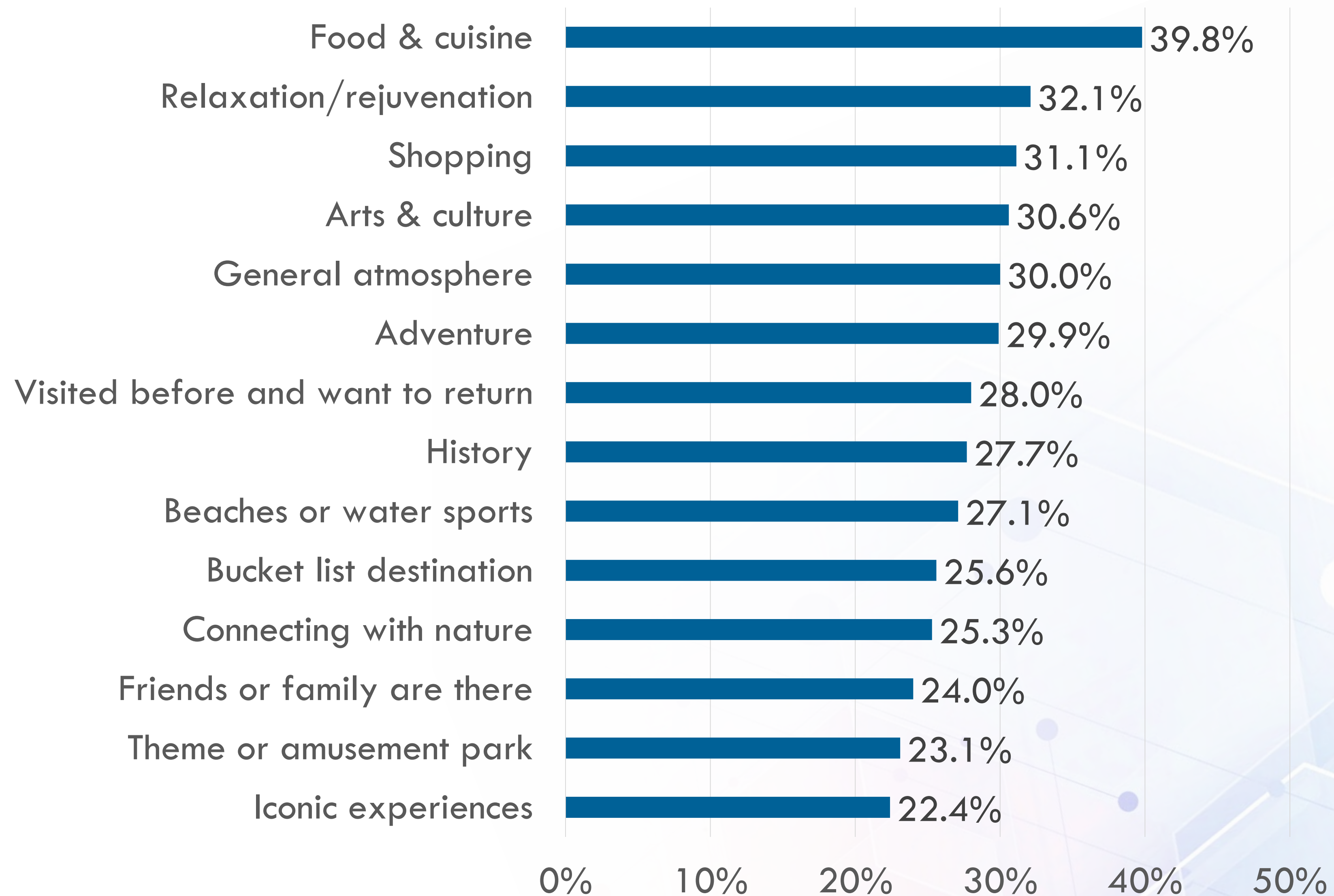
Likely to Visit the USA – by Market

(% “very likely” or “certain” to visit the USA in next 2 years)

	2018	2019	2020	2021	2022	2023	% CHNG 2022-2023
India	76.4%	74.1%	71.3%	81.5%	82.4%	83.9%	1.8%
Brazil	65.4%	66.1%	68.2%	78.8%	82.0%	76.9%	-6.2%
Mexico	69.2%	70.0%	63.0%	71.3%	75.0%	76.1%	1.5%
Canada	57.6%	54.3%	56.9%	47.6%	60.8%	63.1%	3.8%
China	68.9%	58.6%	54.5%	48.1%	63.9%	54.9%	-14.1%
Colombia	-	-	-	-	56.6%	53.9%	-4.8%
Argentina	31.3%	31.4%	34.6%	57.5%	55.5%	50.8%	-8.5%
Germany	44.4%	38.1%	36.8%	39.5%	43.5%	43.4%	-0.2%
United Kingdom	38.7%	38.4%	41.9%	32.8%	46.5%	40.1%	-13.8%
Italy	39.1%	37.6%	35.6%	44.1%	49.6%	38.1%	-23.2%
France	30.6%	28.9%	29.8%	32.4%	41.1%	35.3%	-14.1%
Japan	26.8%	33.7%	29.5%	31.6%	28.9%	33.3%	15.2%
South Korea	34.0%	32.0%	33.9%	39.0%	38.3%	32.8%	-14.4%
Australia	37.3%	34.2%	34.3%	32.0%	18.0%	32.6%	81.1%
Netherlands	21.4%	18.3%	26.2%	24.1%	22.5%	23.5%	4.4%

Q. How likely are you to travel for leisure to the United States of America in the next TWO YEARS? (Top 2 Box = “very likely” or “certain”)

DRIVERS OF TRAVEL AMONG THOSE MOST INTERESTED IN THE USA



Q. Question: You said you would like to visit in the next year. Which of the following are reasons you want to visit in the next year? (Select all that apply)

A woman with dark, curly hair is sitting on a large, layered rock formation in a desert landscape. She is wearing a blue jacket, light-colored pants, and red sneakers. In the background, several hot air balloons are floating in a clear blue sky with scattered white clouds. The overall scene is bright and scenic, suggesting a travel or adventure theme.

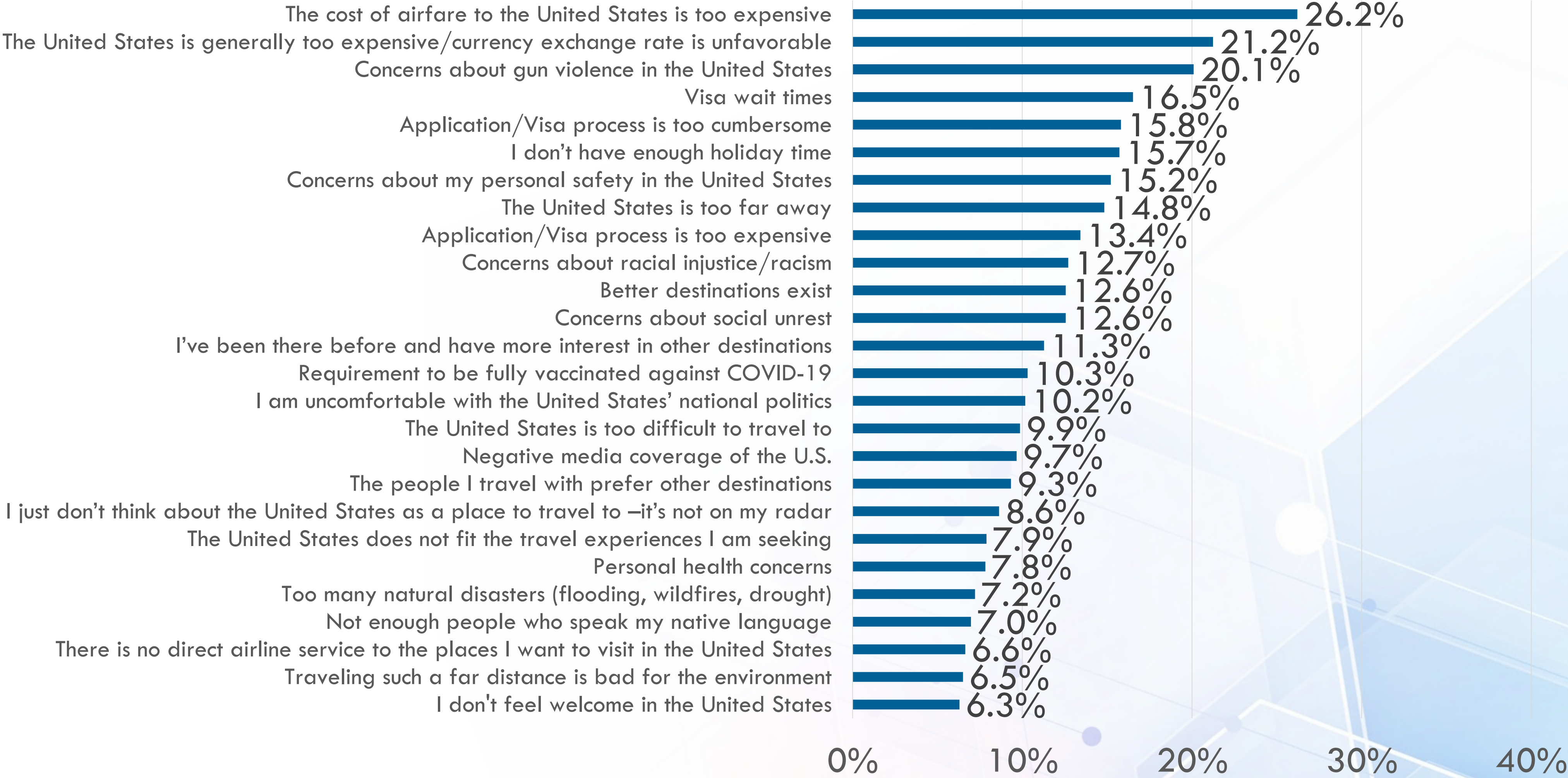
HOW DO WE MAKE INTERNATIONAL
TRAVELERS WANT TO VISIT THE U.S.?

DETERRENTS TO VISITING THE USA



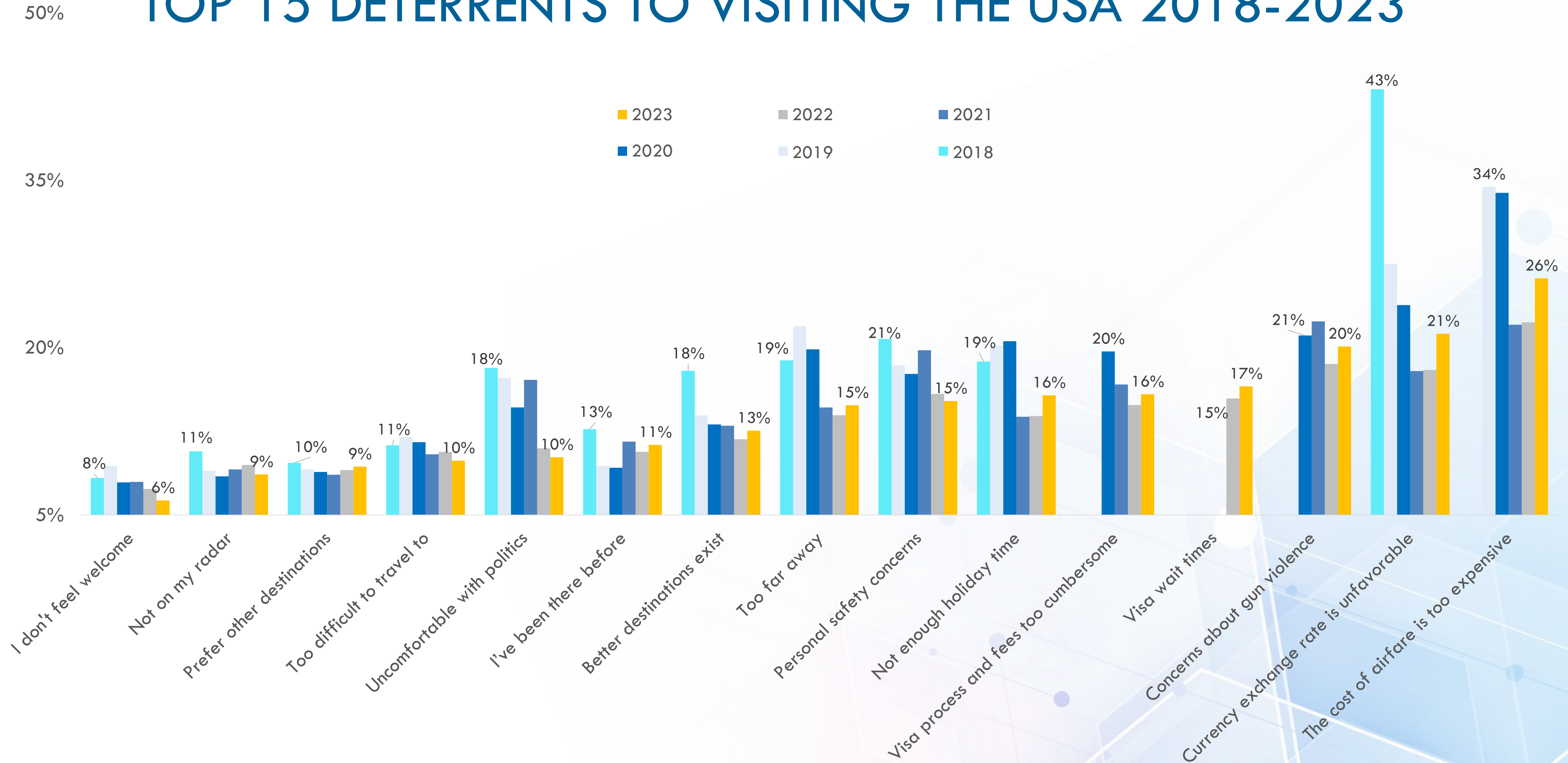
Q. Which best describe your current reasons for not visiting the United States more frequently? (Select all that apply)

DETERRENTS TO VISITING THE USA – ALL RESPONSES



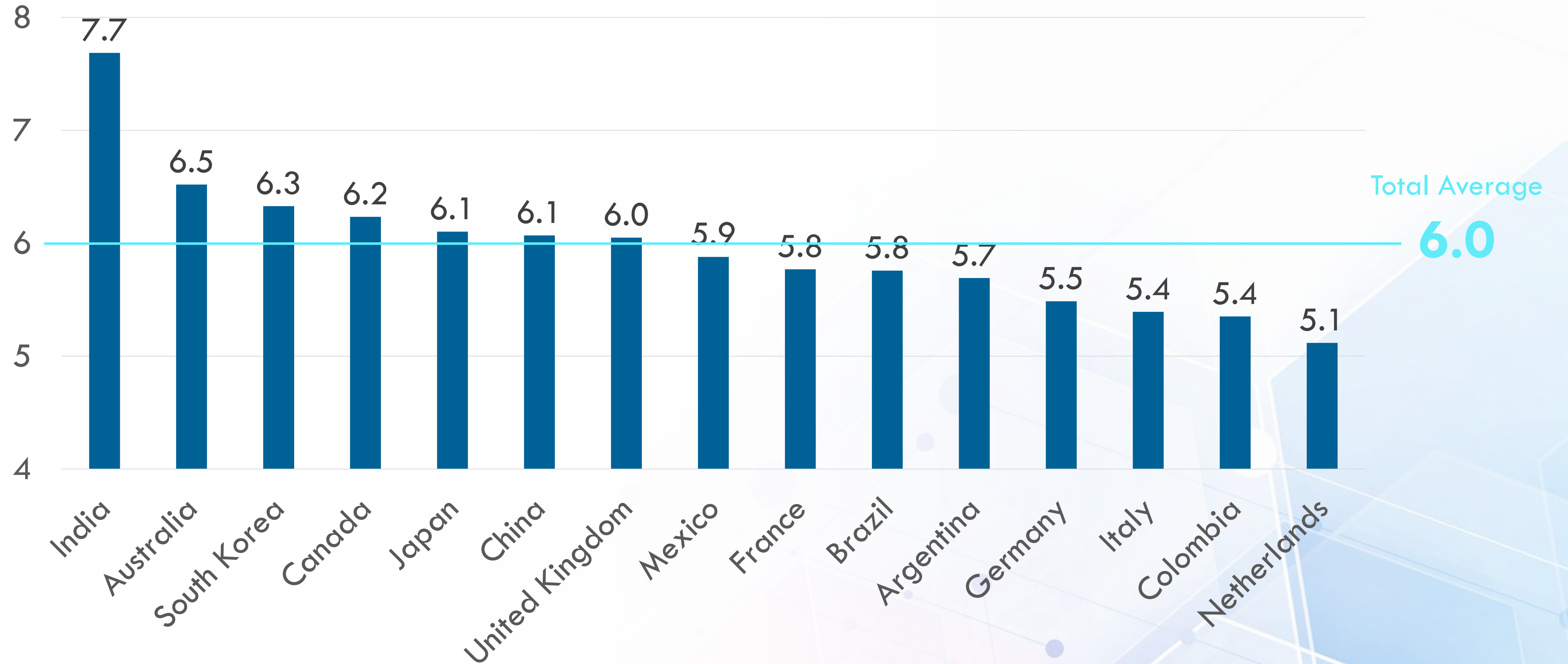
Q. Which best describe your current reasons for not visiting the United States more frequently? (Select all that apply)

TOP 15 DETERRENTS TO VISITING THE USA 2018-2023



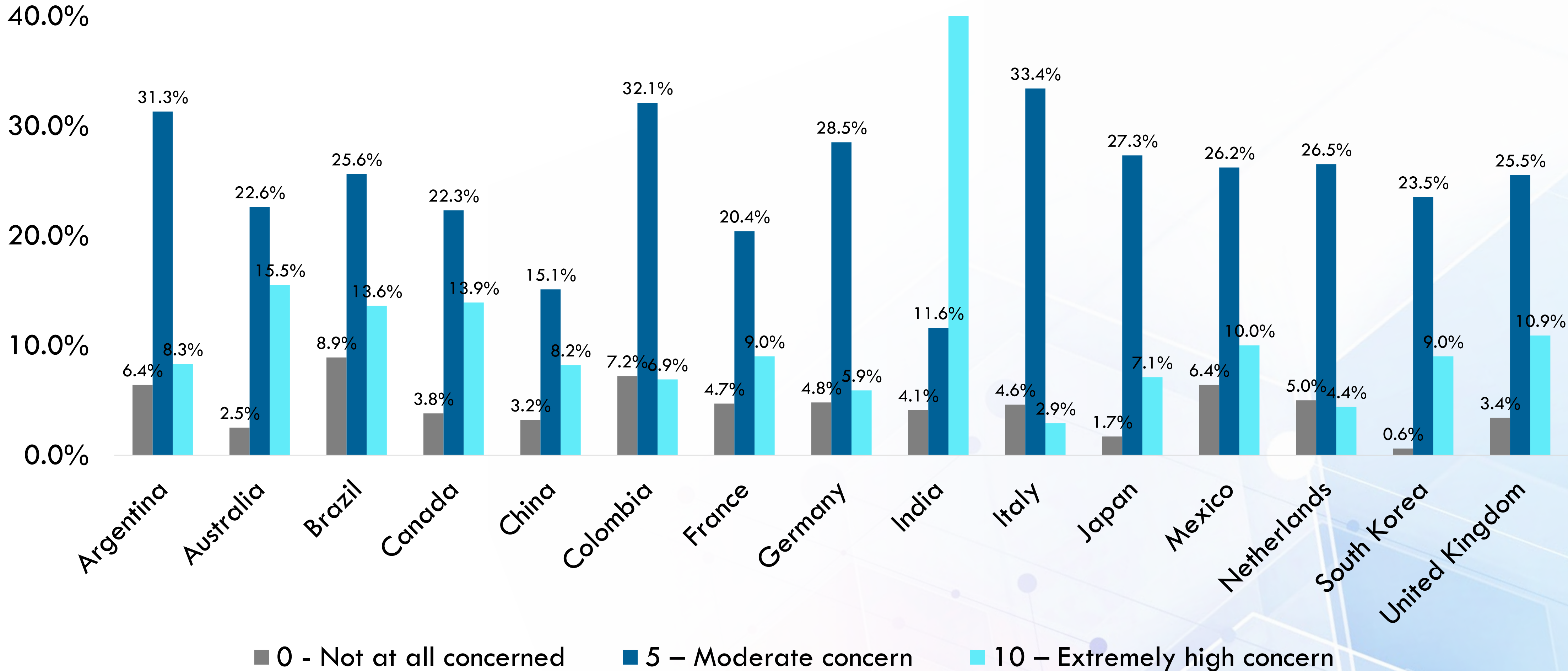
Q. In the next 12 months, do you expect to take more, fewer or the same number of INTERNATIONAL LEISURE TRIPS than you did in the most recent 12 month period?
 Q. In the next 12 months, do you expect to spend more, less or the same on INTERNATIONAL LEISURE TRAVEL than you did in the most recent 12 month period?

SAFETY CONCERNS WHILE VISITING THE USA



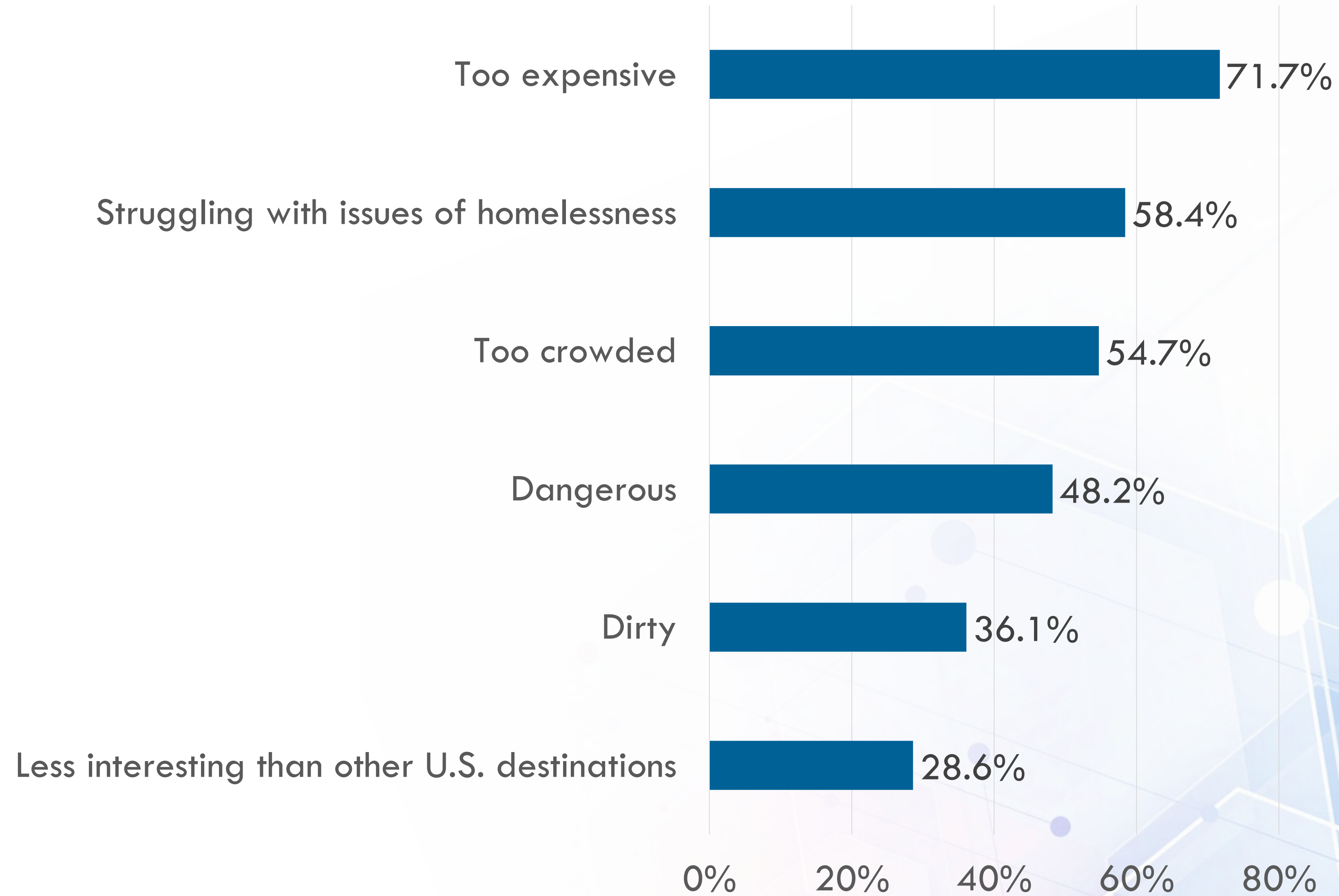
Q. How concerned would you be about your personal safety if traveling in the United States?

SAFETY CONCERNS WHILE VISITING THE USA - DETAIL



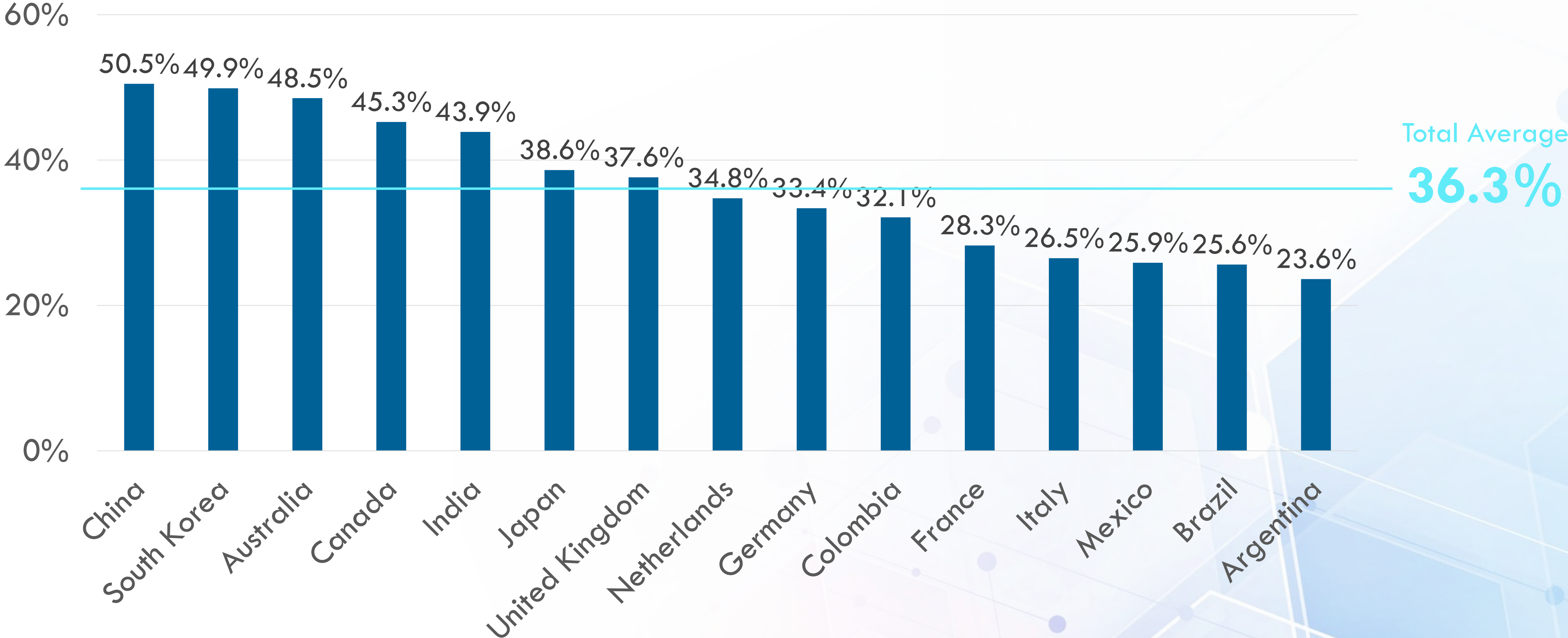
Q. How concerned would you be about your personal safety if traveling in the United States?

PERCEPTIONS OF AMERICA'S CITIES



Q. True or false? Select the response that best describes your feelings about major U.S. cities (like San Francisco, Los Angeles, Chicago, Orlando, Dallas, New York City)

RECALLED NEGATIVE MEDIA COVERAGE ABOUT MAJOR US CITIES



Question: Do you recall seeing negative media coverage about major U.S. cities?

What Was Your Favorite or Most Memorable Part of Visiting The United States?

“I loved that there were places I can go to really feel the culture! It’s important to me to be with the locals and see how they live.”

“The wide open natural landscape contrasting with the vibrancy of cities.”

“It's the most popular country in the world and majority of what I see on tv takes part there, so it was so nostalgic to finally experience it in person.”

“My most memorable part of visiting the USA was that food. It is very delicious.”

“The shopping experience seems a lot more fun in the US and way cheaper due to currency compared to Canada. I also enjoyed dining in the states because there was so much variety and better portions compared to my country!”

“Many beautiful, poetic landscapes and many mysteries are waiting for visitors to discover!”

CHANGE IN PERCEPTION OF THE USA SINCE LAST VISIT



65.6%

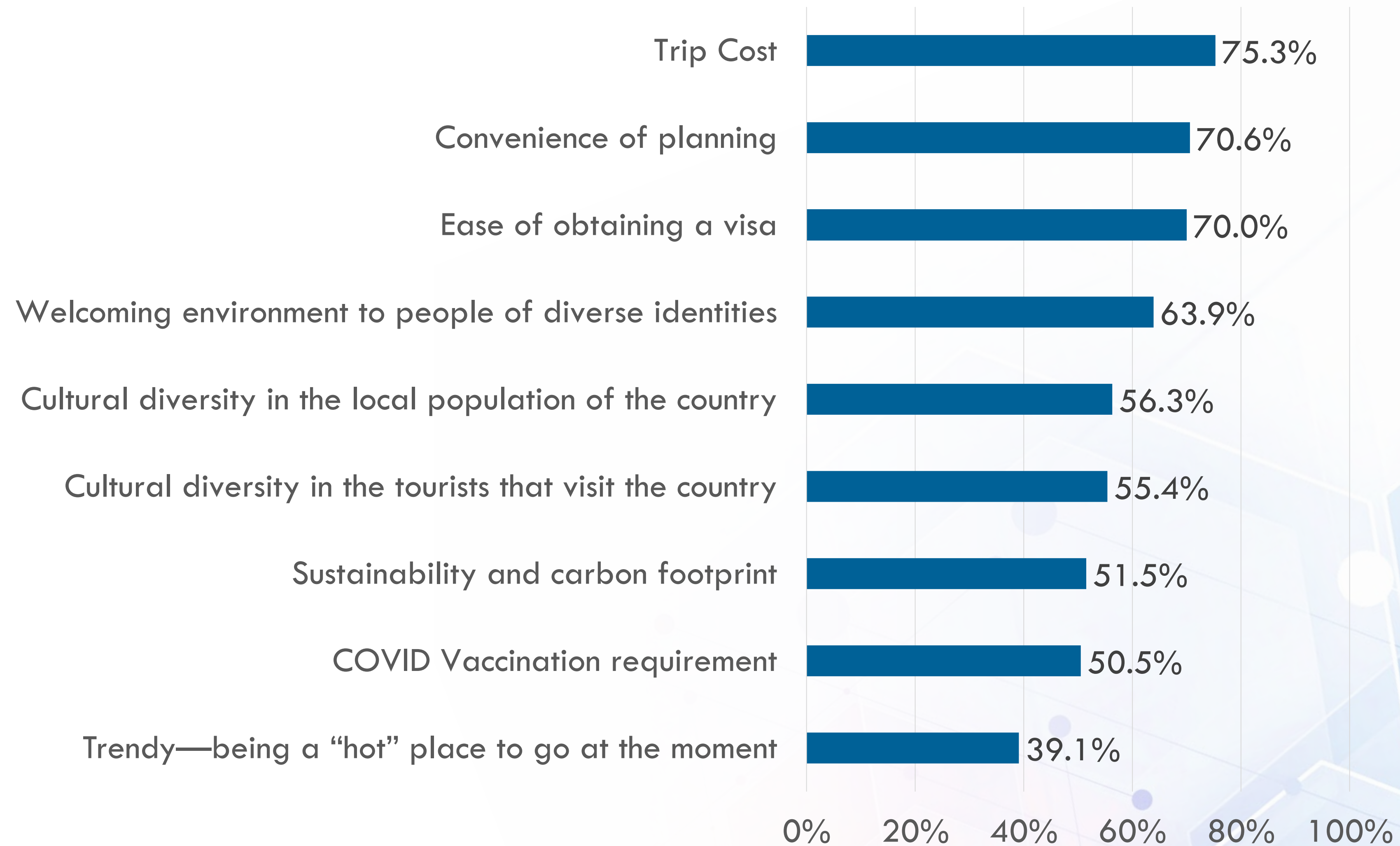
Say their perception of the US has improved since their most recent visit within the last 2 years



6.6%

Say their perception of the US has declined since their most recent visit (Canada, Australia, Columbia, the UK show the biggest declines in perception)

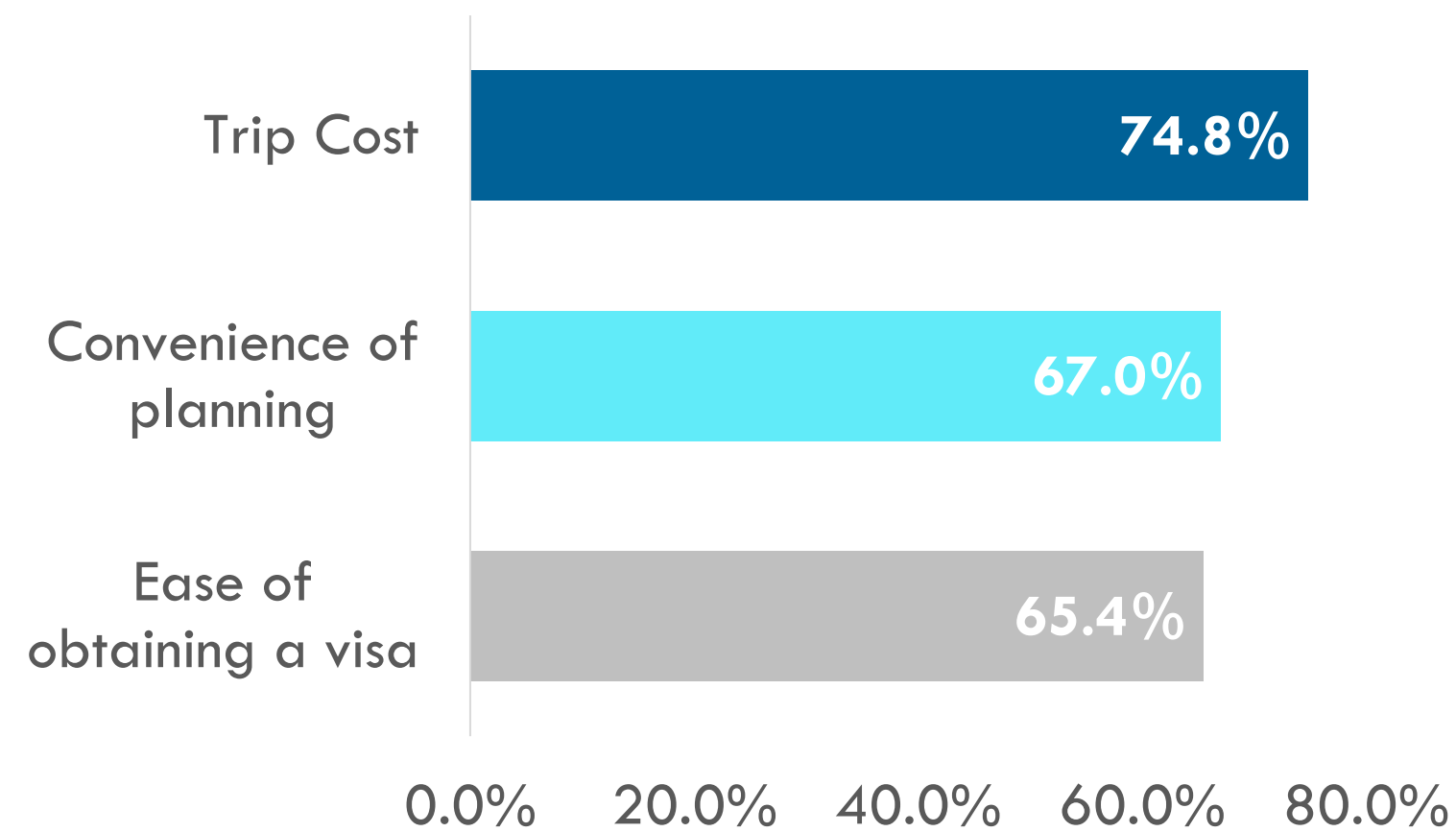
IMPORTANT FACTORS IN BOOKING INTERNATIONAL TRAVEL



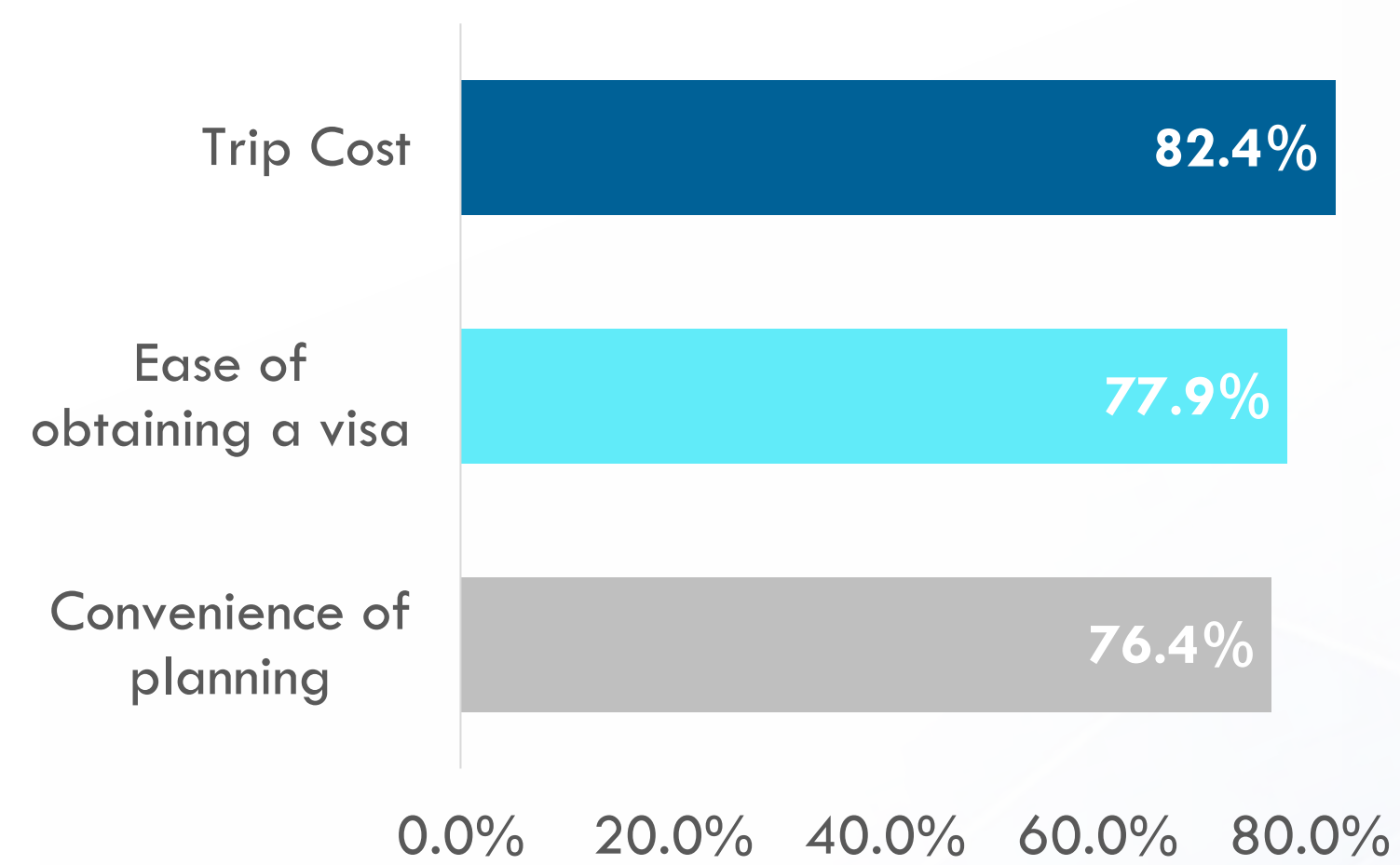
Question: How important is each of the following factors when booking international travel?

IMPORTANT FACTORS IN BOOKING INT. TRAVEL TOP 3

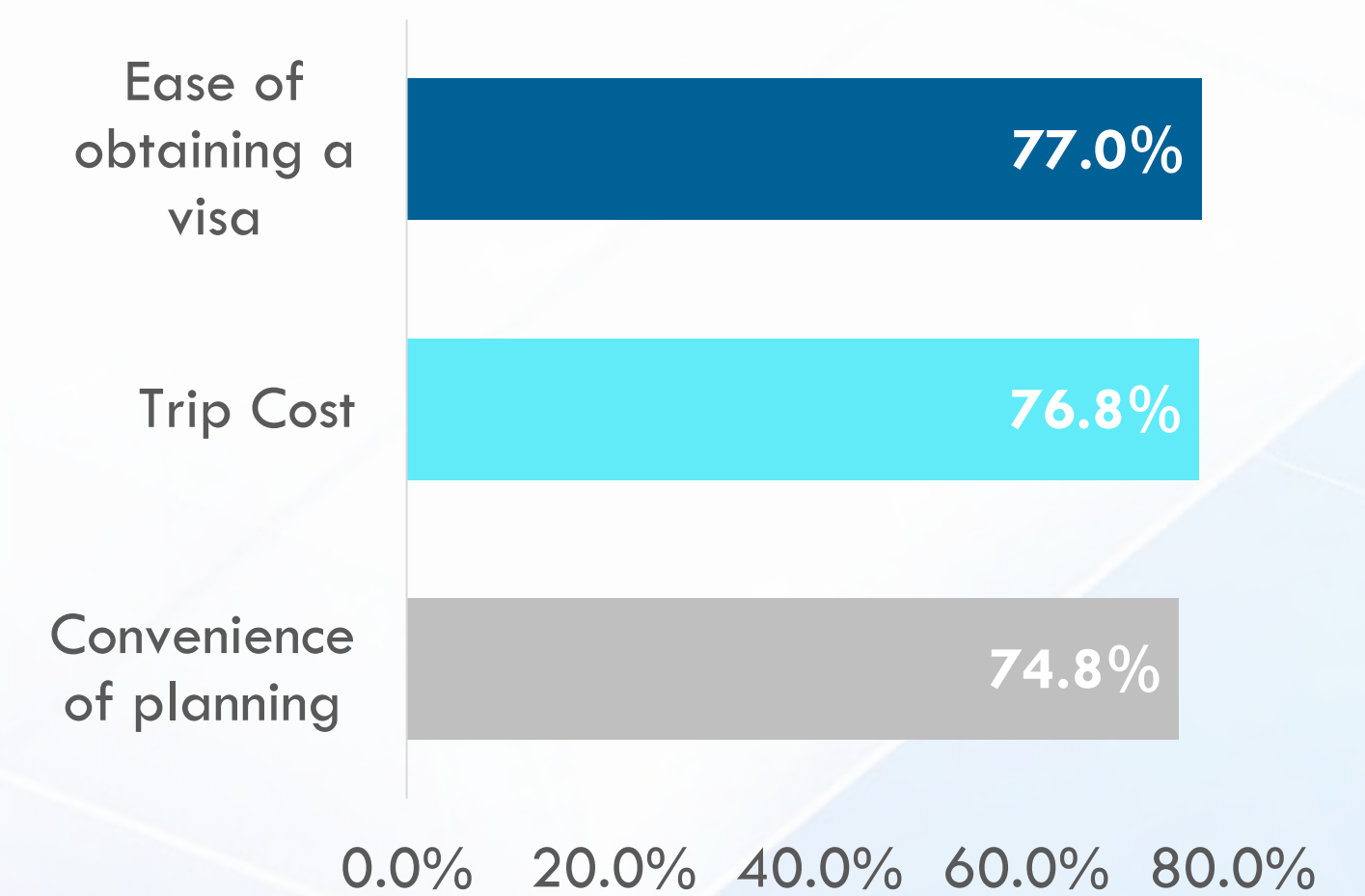
Common Factors for
Canada, Germany, Italy, South Korea, UK



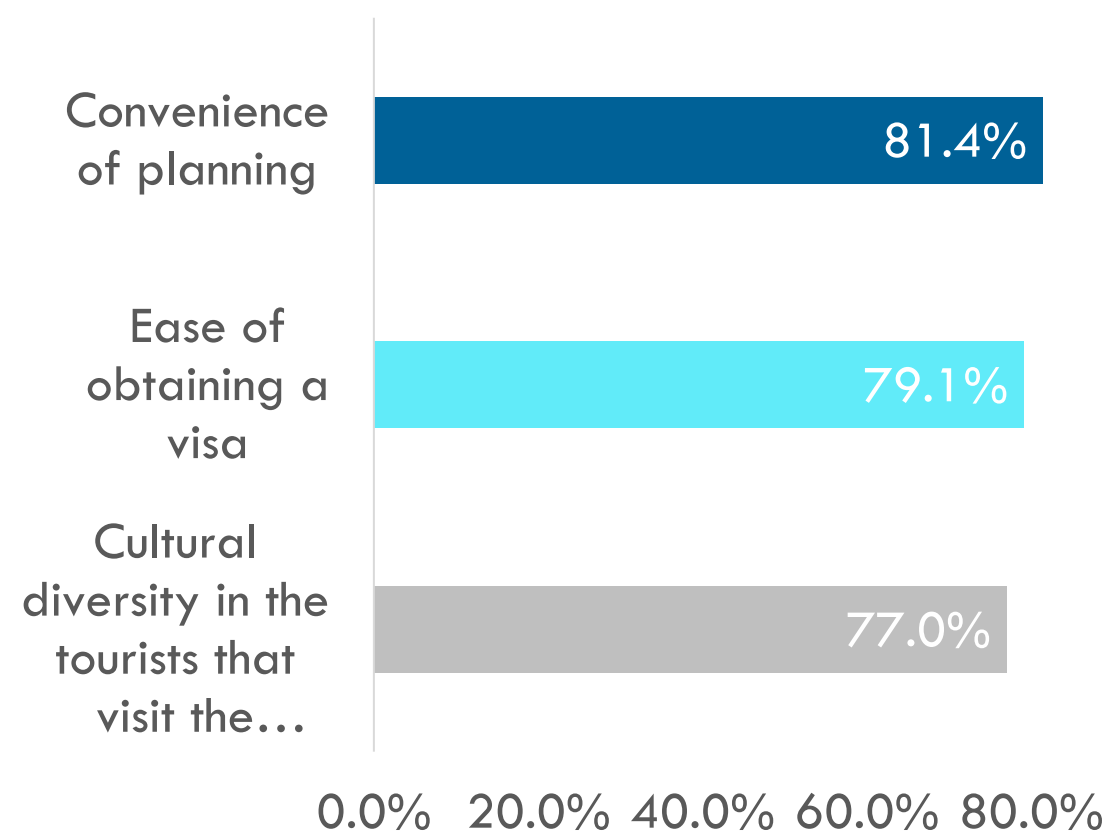
Common Factors for
Argentina, Australia, and Mexico



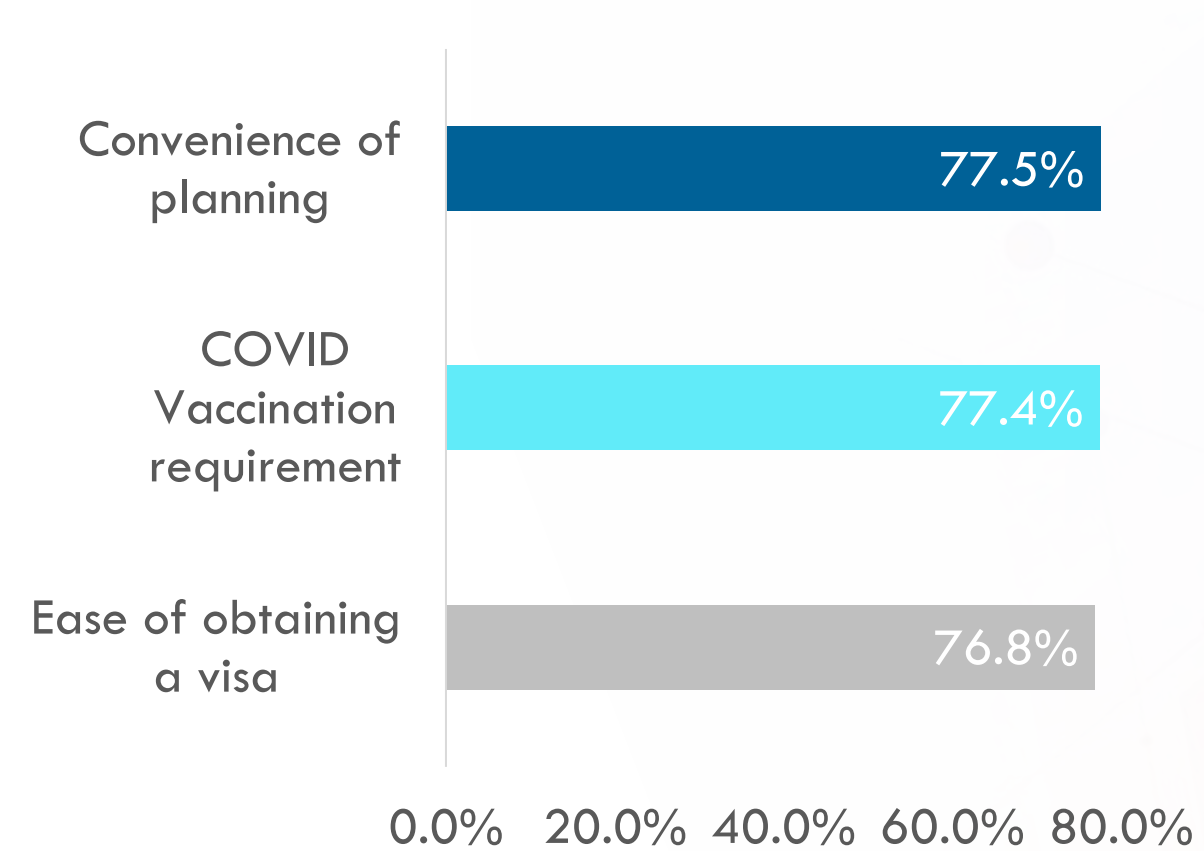
Common Factors for
Brazil and Colombia



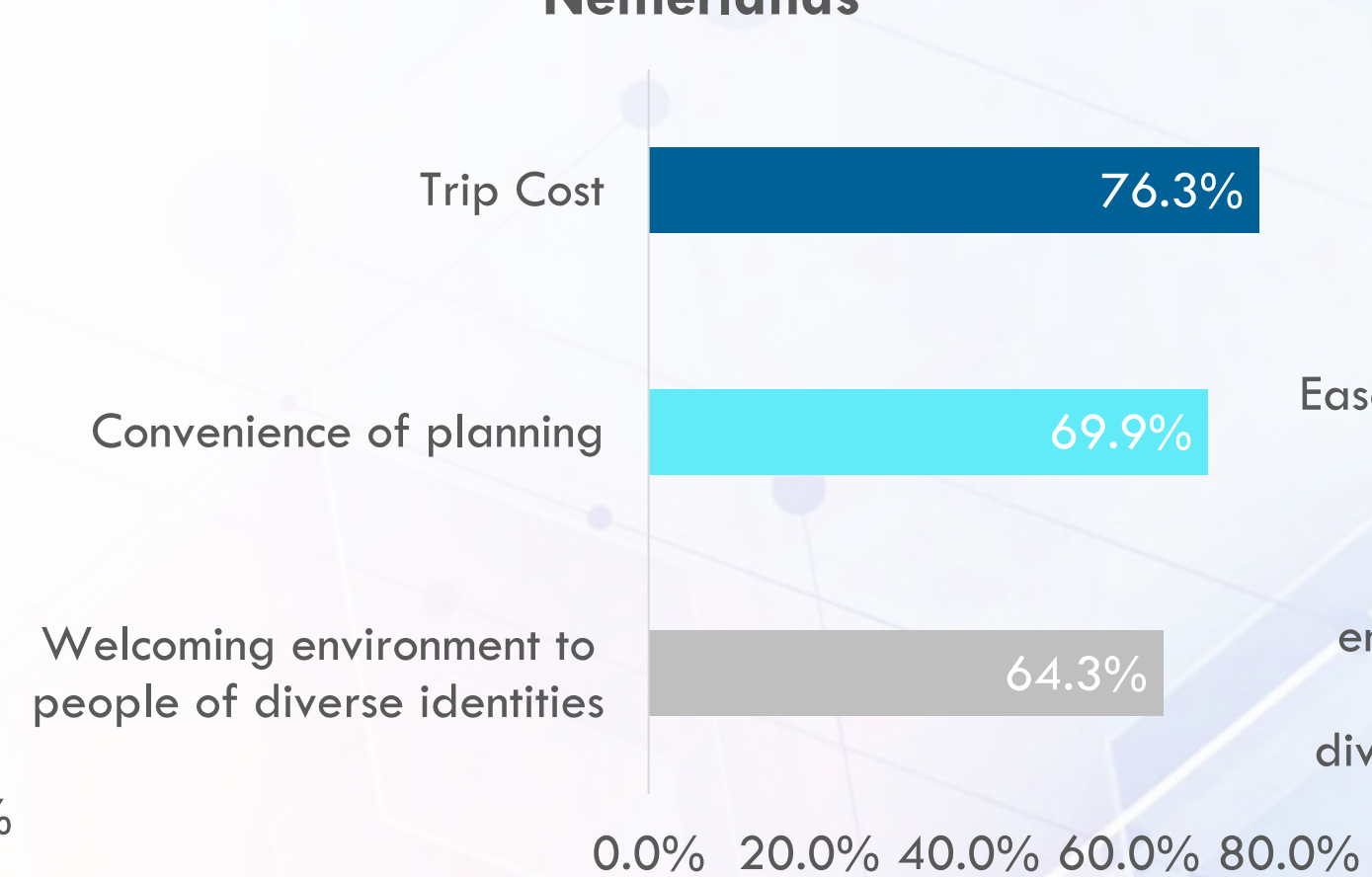
China



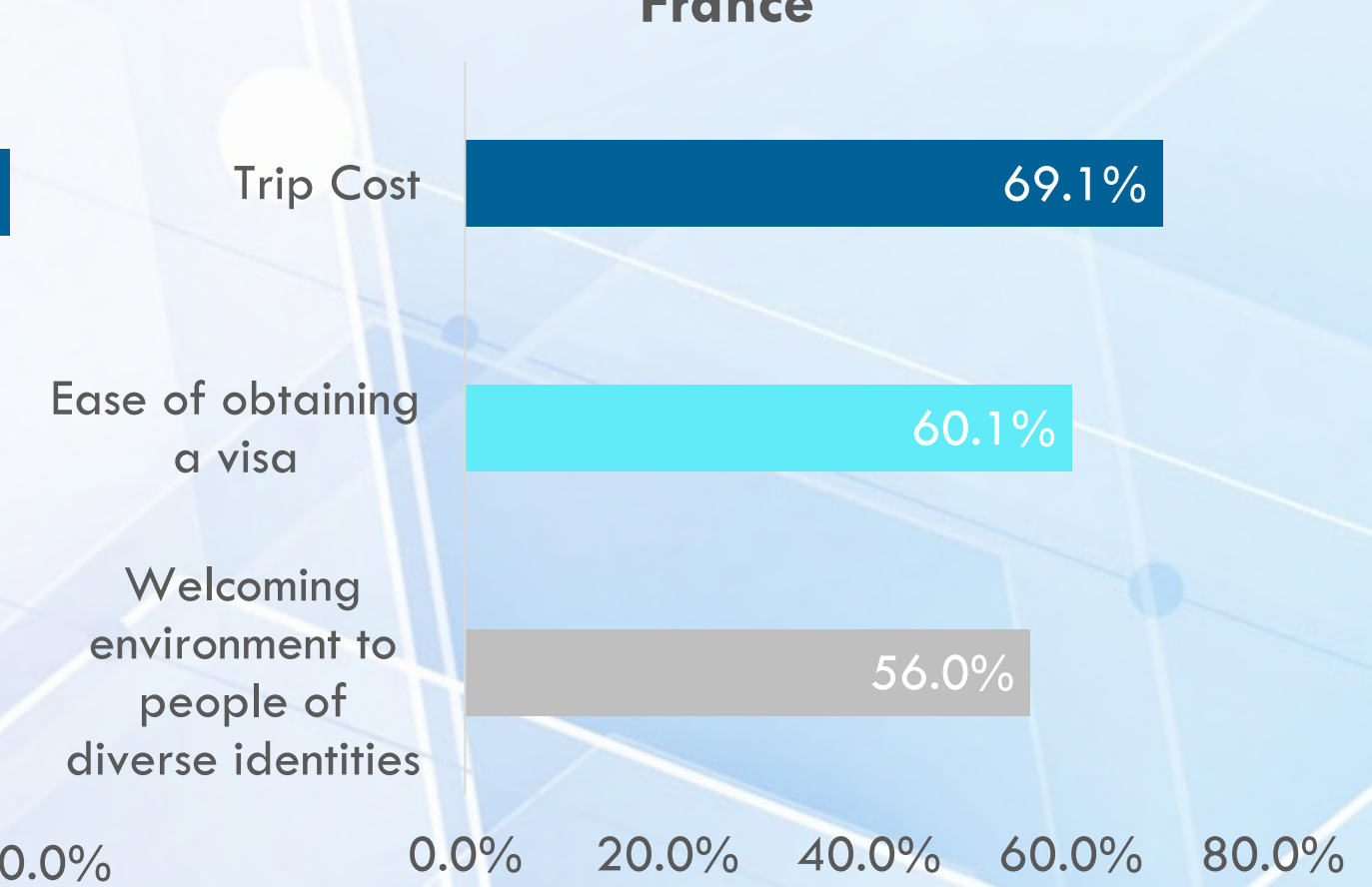
India



Netherlands

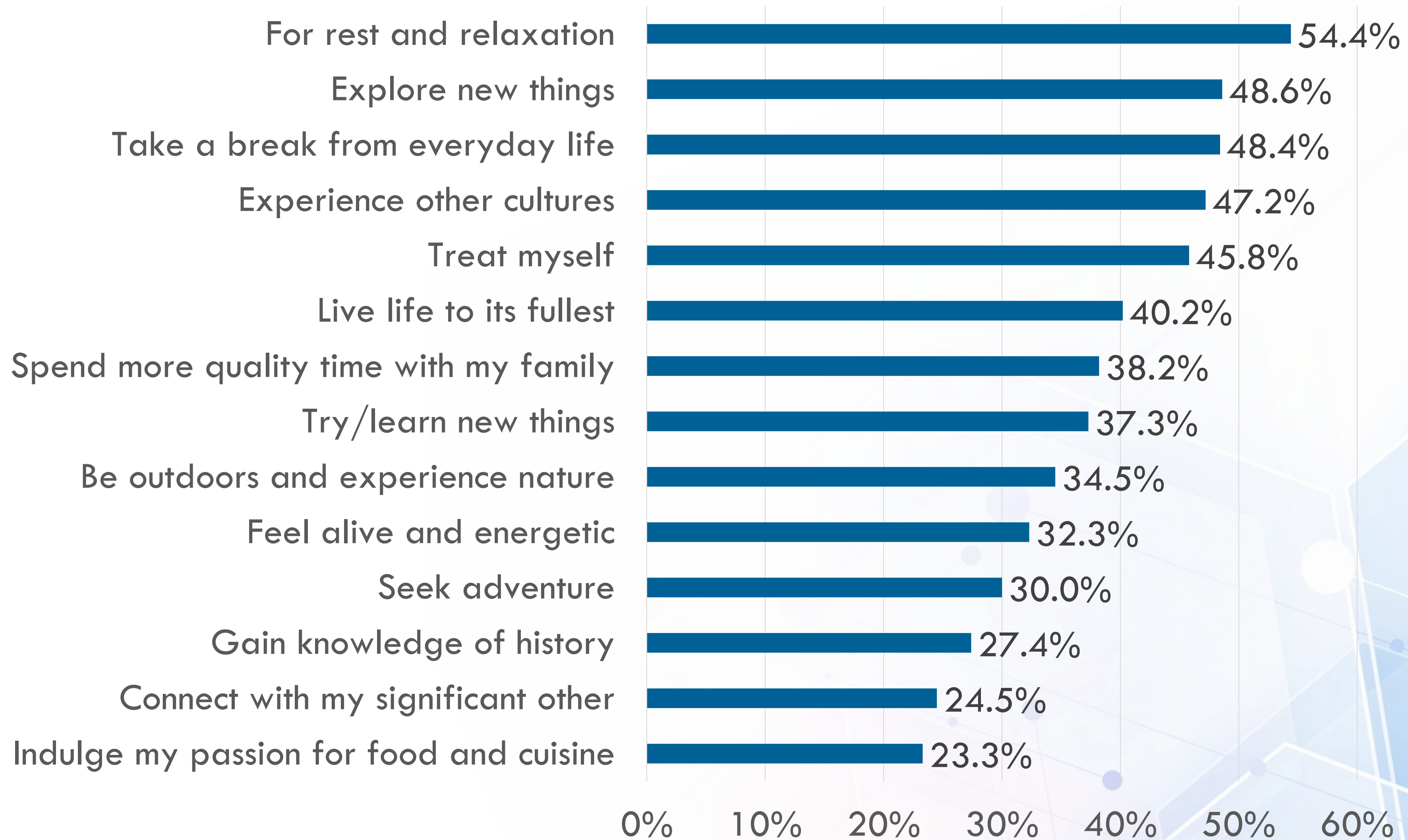


France



Question: How important is each of the following factors when booking international travel?

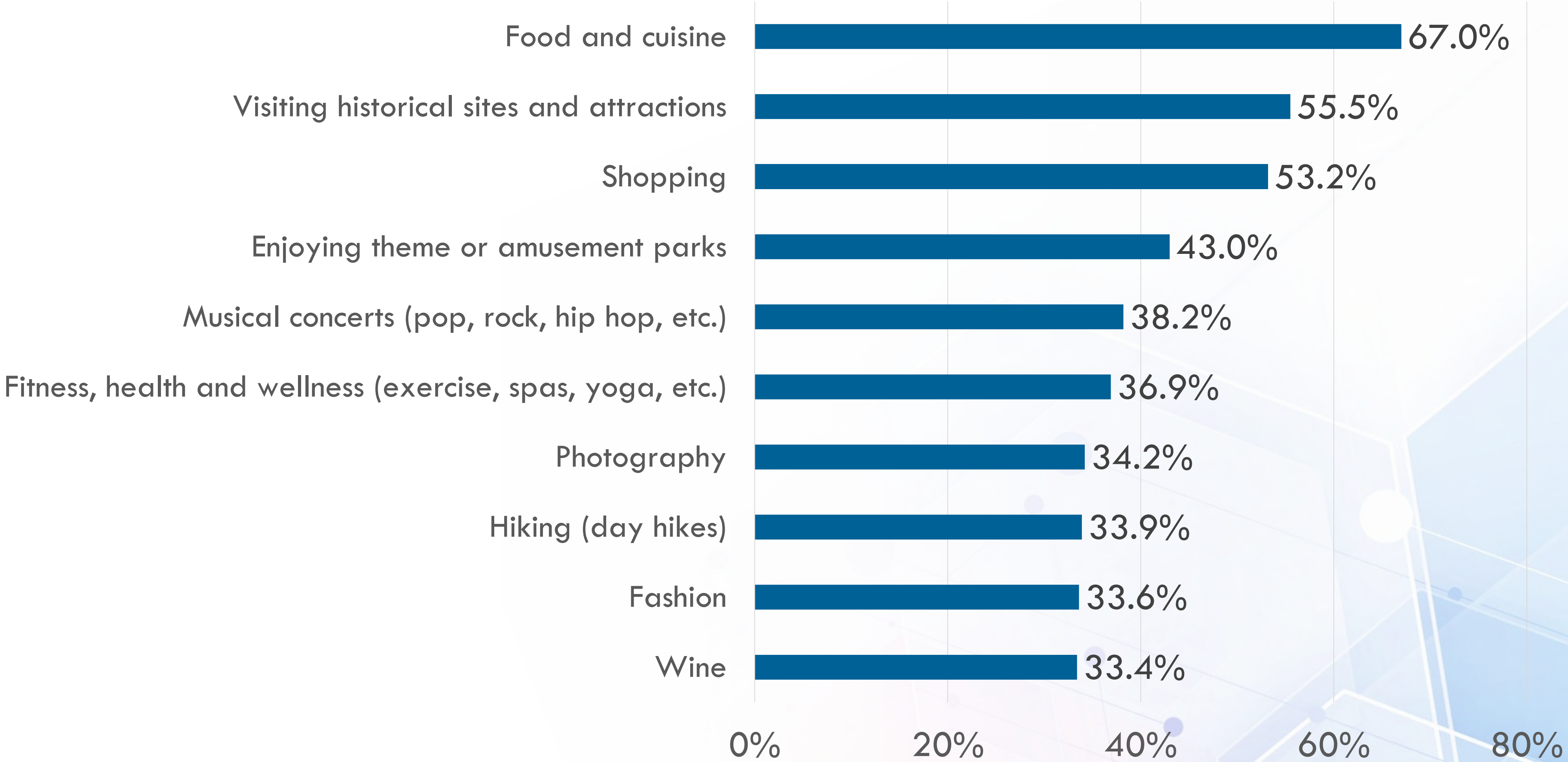
WHAT DRIVES THE DESIRE TO TRAVEL?



A group of four hikers, including a woman with a baby carrier, are seen from behind, looking out over a vast landscape of red rock mountains under a blue sky with scattered clouds. The hikers are wearing various gear like backpacks and hats. The scene is set in a natural, outdoor environment with green shrubs in the foreground and towering rock formations in the background.

WHO MOST WANTS
TO COME TO THE US?

TOP PASSIONS AMONG THOSE MOST INTERESTED IN THE USA



Q. Tell us about your hobbies and passions. Which of these do you have extremely high interest in?

FEATURES OF U.S. TRIP

12.6

Weeks to Plan U.S. Trip

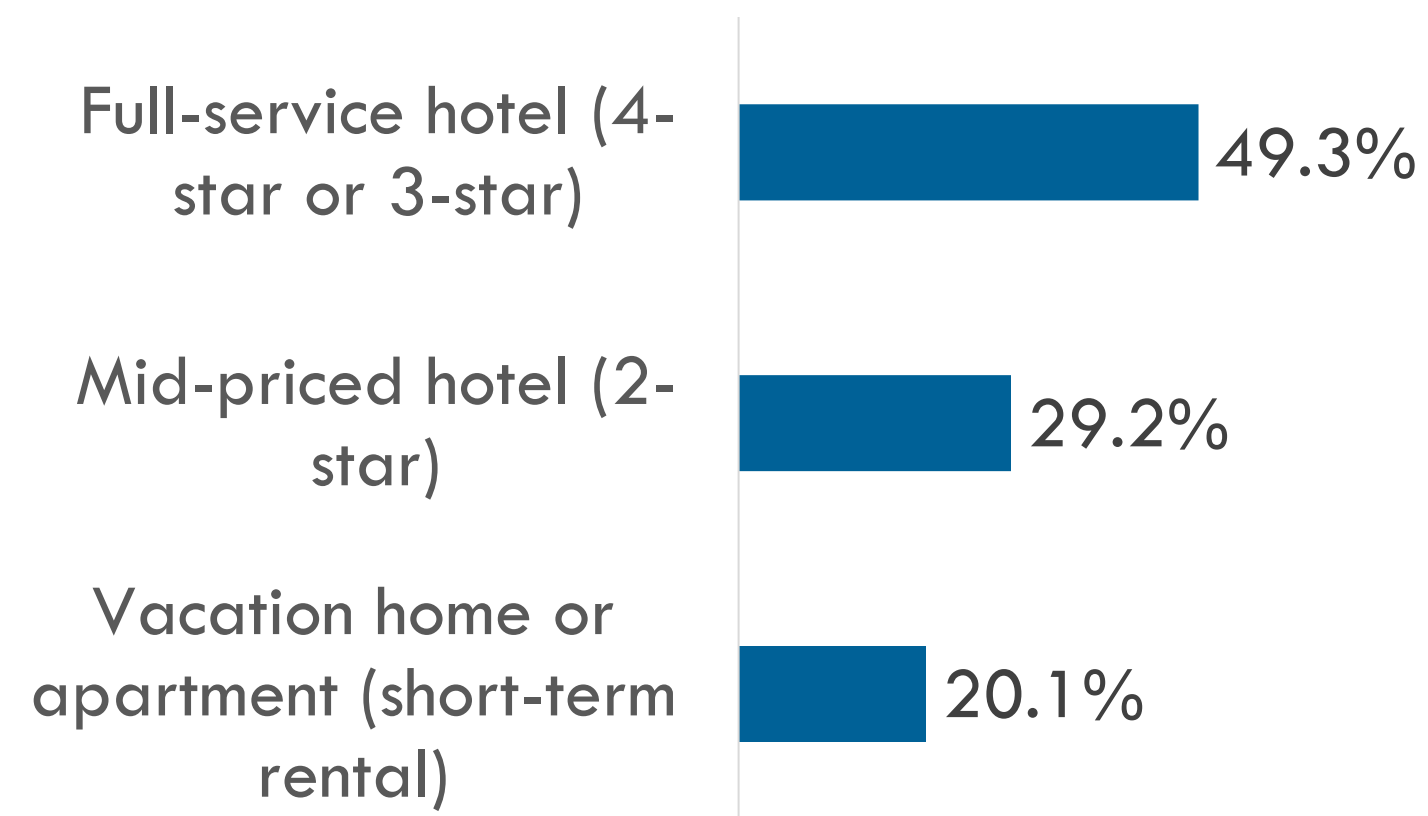
12.9

Ideal Number of Trip Days

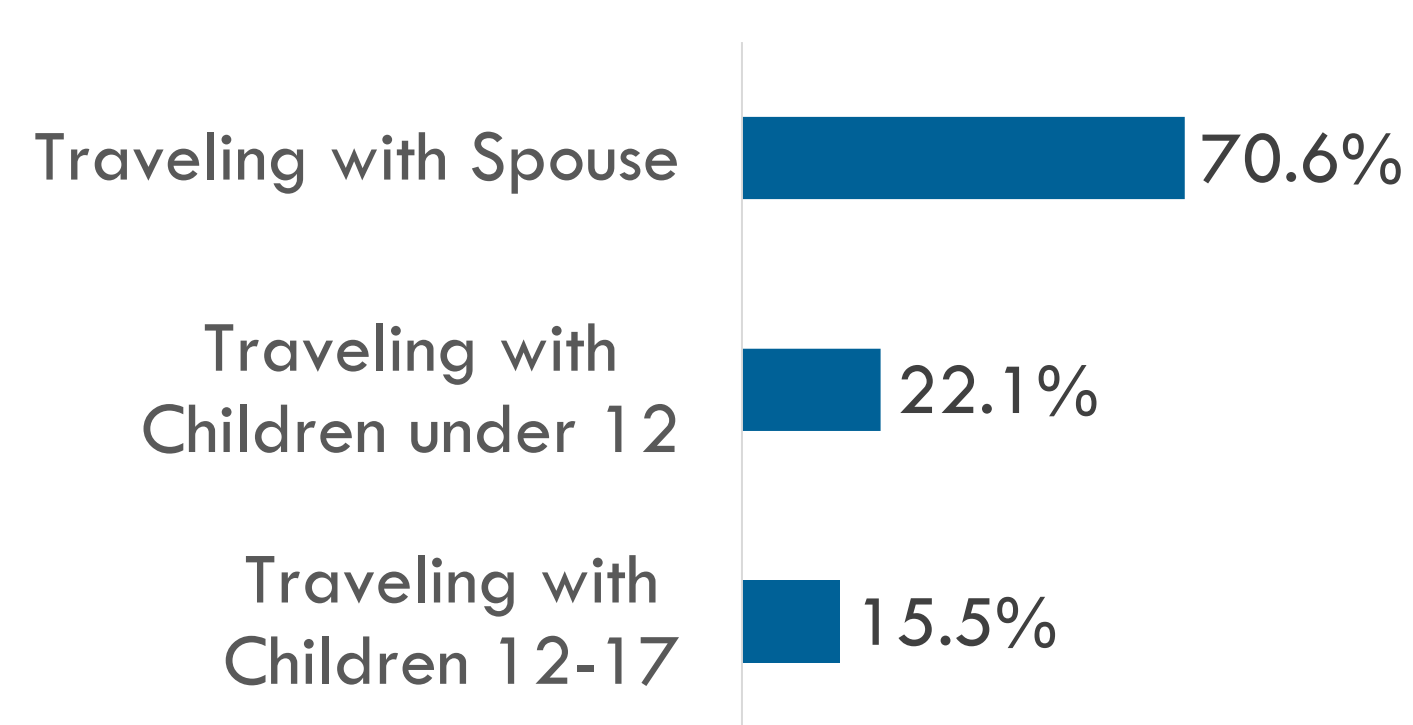
4.0

Number of Destinations

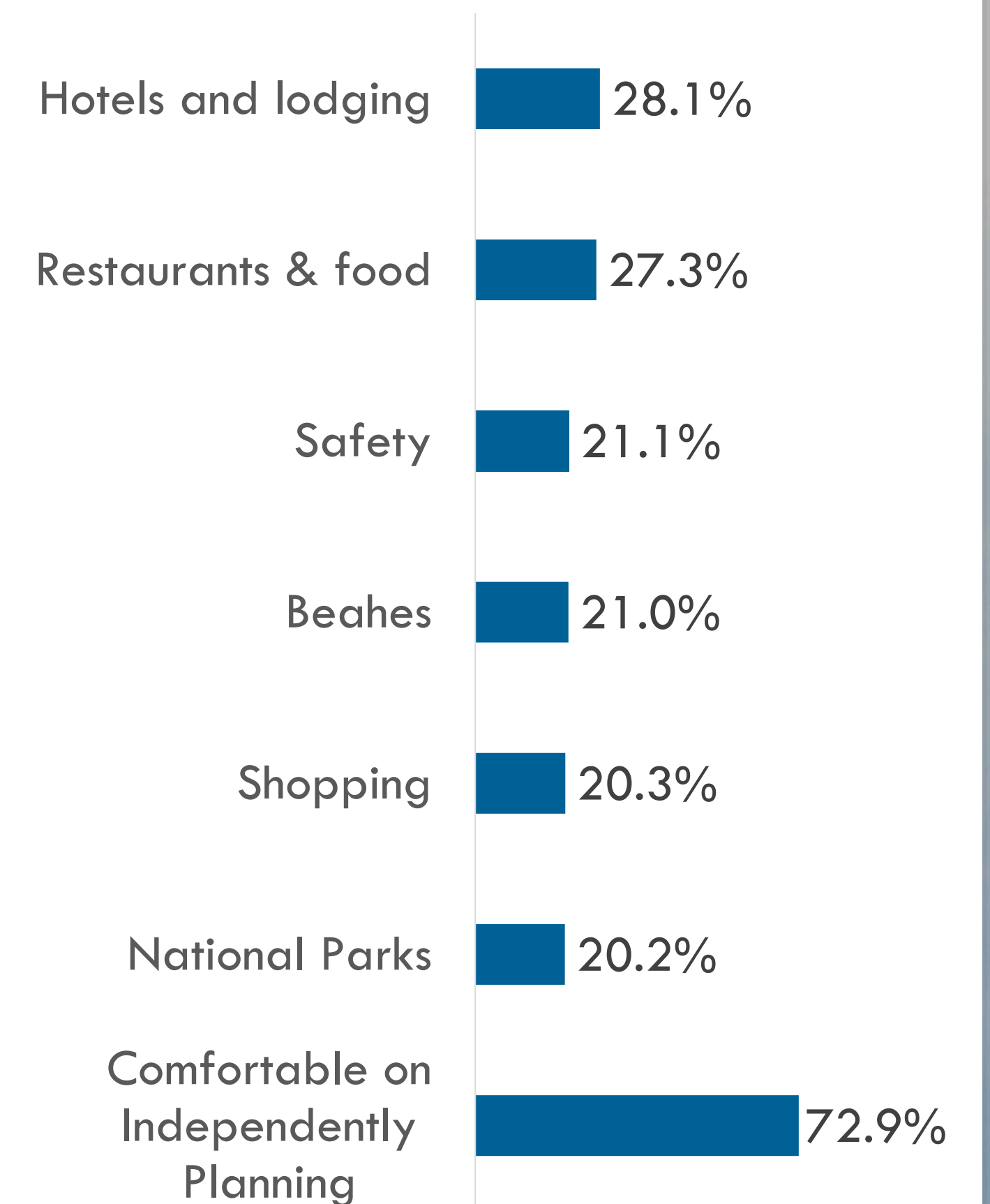
TOP 3 LODGING CHOICES



TRAVELING COMPANIONS



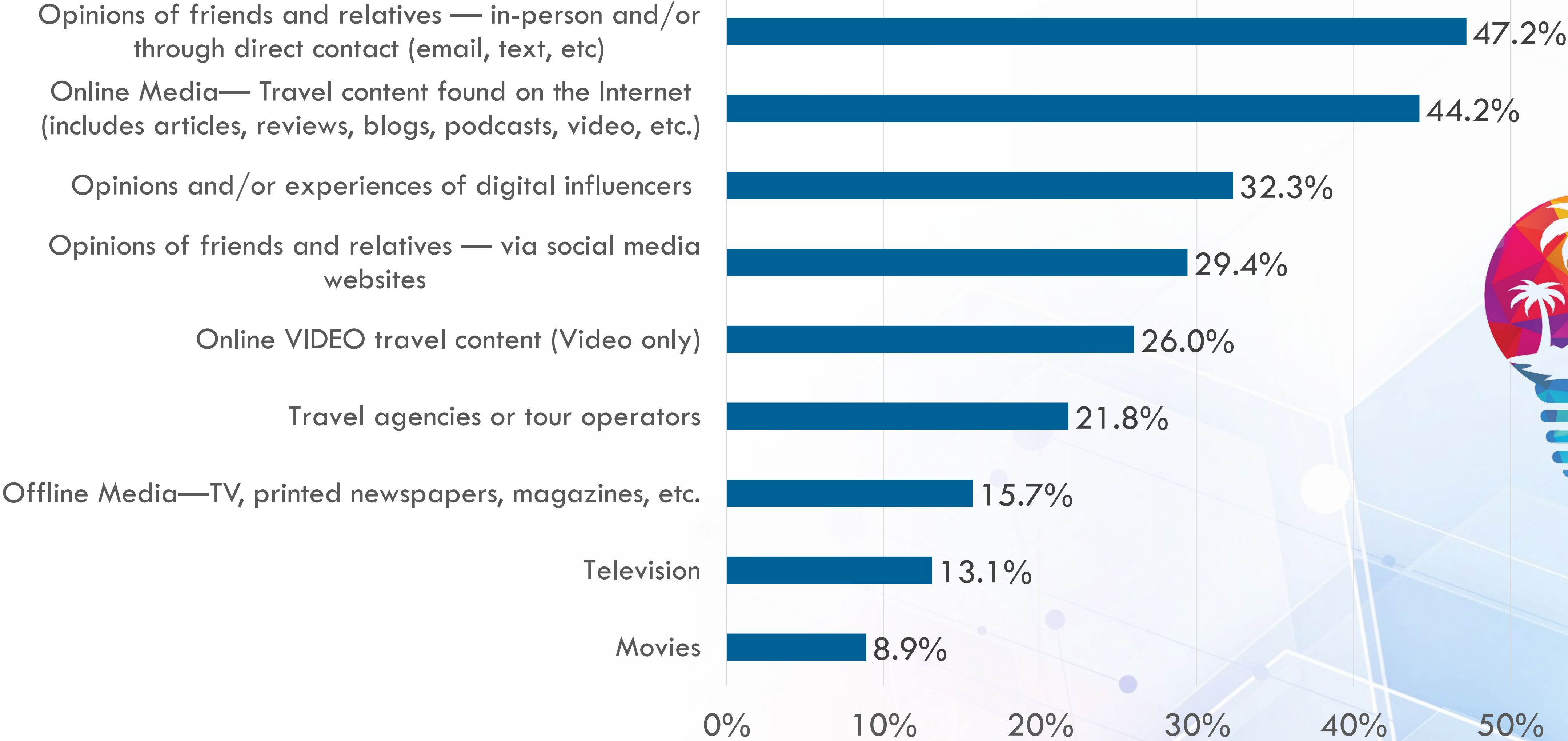
MOST IMPORTANT INFO NEEDED



HOW DO WE REACH INTERNATIONAL TRAVELERS?



SOURCES OF DESTINATION INSPIRATION



Q. Please think specifically about how you get your inspiration for the destinations you want to visit internationally. Which would you typically use to find destination ideas and inspiration? (Select all that apply)

TRIP PLANNING RESOURCES

Use of Digital Travel Planning Resources (Overall—all countries)

(% likely to use for international travel planning)

Online search engines (Google, Bing, Yahoo, etc.)	56.8%
Online travel agencies (Expedia, Travelocity, etc.)	45.2%
Official visitor's bureau website	33.5%
Tour agent or tour operator websites	26.3%
Online travel reviews, blogs, itineraries or opinions from other travelers	26.0%
Online mapping website	25.5%
Social media (Facebook, Twitter, Pinterest, etc.)	24.2%
Online video travel content	18.3%
Official visitor's bureau social media content	17.3%
Home-sharing or Vacation Rental Websites (AirBnB, etc.)	15.2%
Travel-related apps	14.9%
Travel or lifestyle magazine websites (online content)	14.4%
Digital influencers	10.2%
Travel-related e-mail newsletters	8.7%
Newspaper travel section (online content)	8.7%
Podcasts	4.0%

Use of Traditional (Offline) Travel Planning Resources (Overall—all countries)

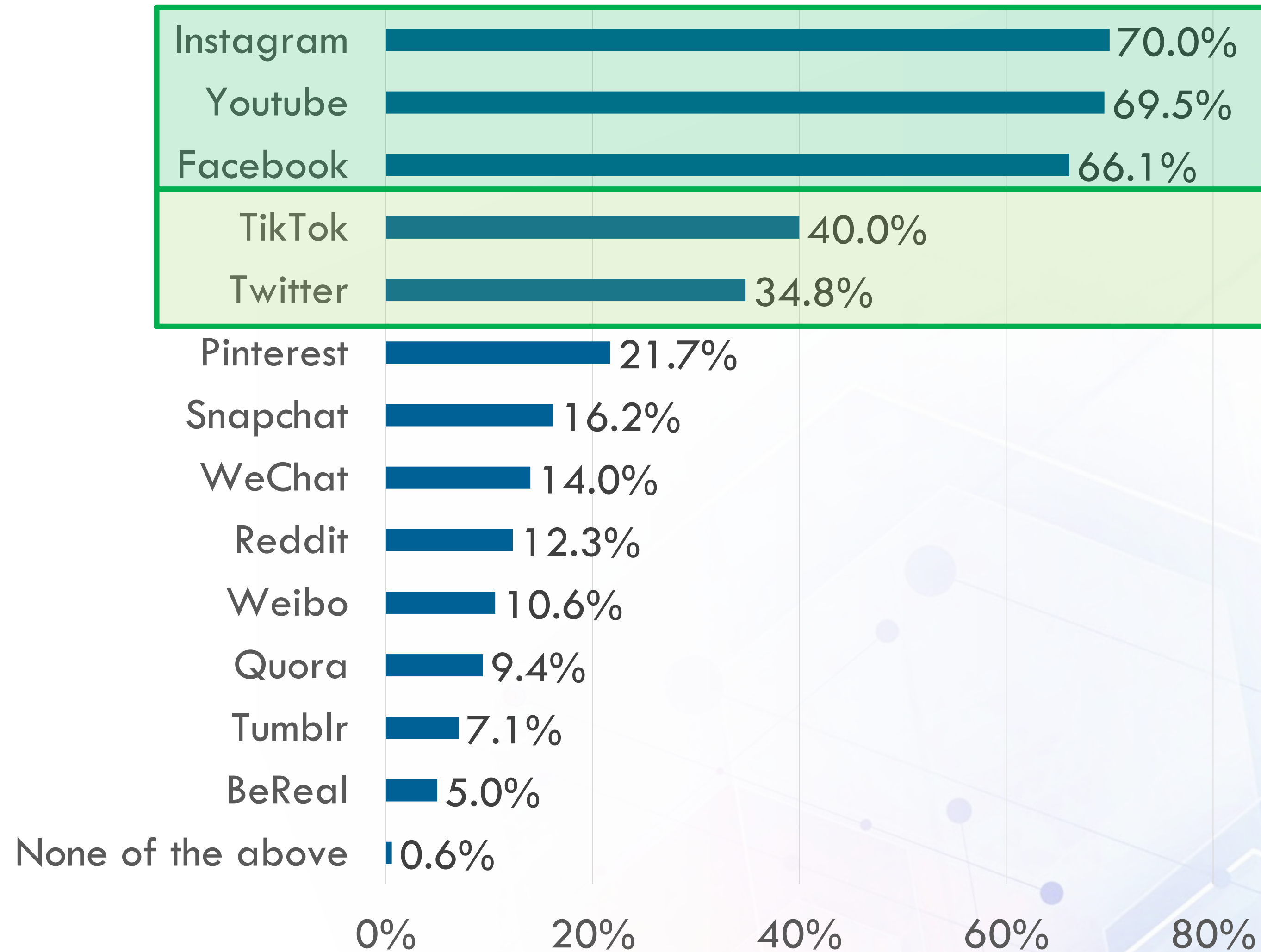
(% likely to use for international travel planning)

Opinions of friends, colleagues, or relatives	46.8%
Travel agent - offline (traditional or store front)	35.0%
Travel related TV programming	28.9%
Commercial guidebook	27.2%
Travel or lifestyle magazine	22.9%
Official visitor information center	20.0%
Newspaper travel section	16.1%
Travel related radio programming	10.0%

Q. If you were planning an international leisure trip, which of the following OFFLINE RESOURCES would you likely use to plan your trip? (Select all that apply)

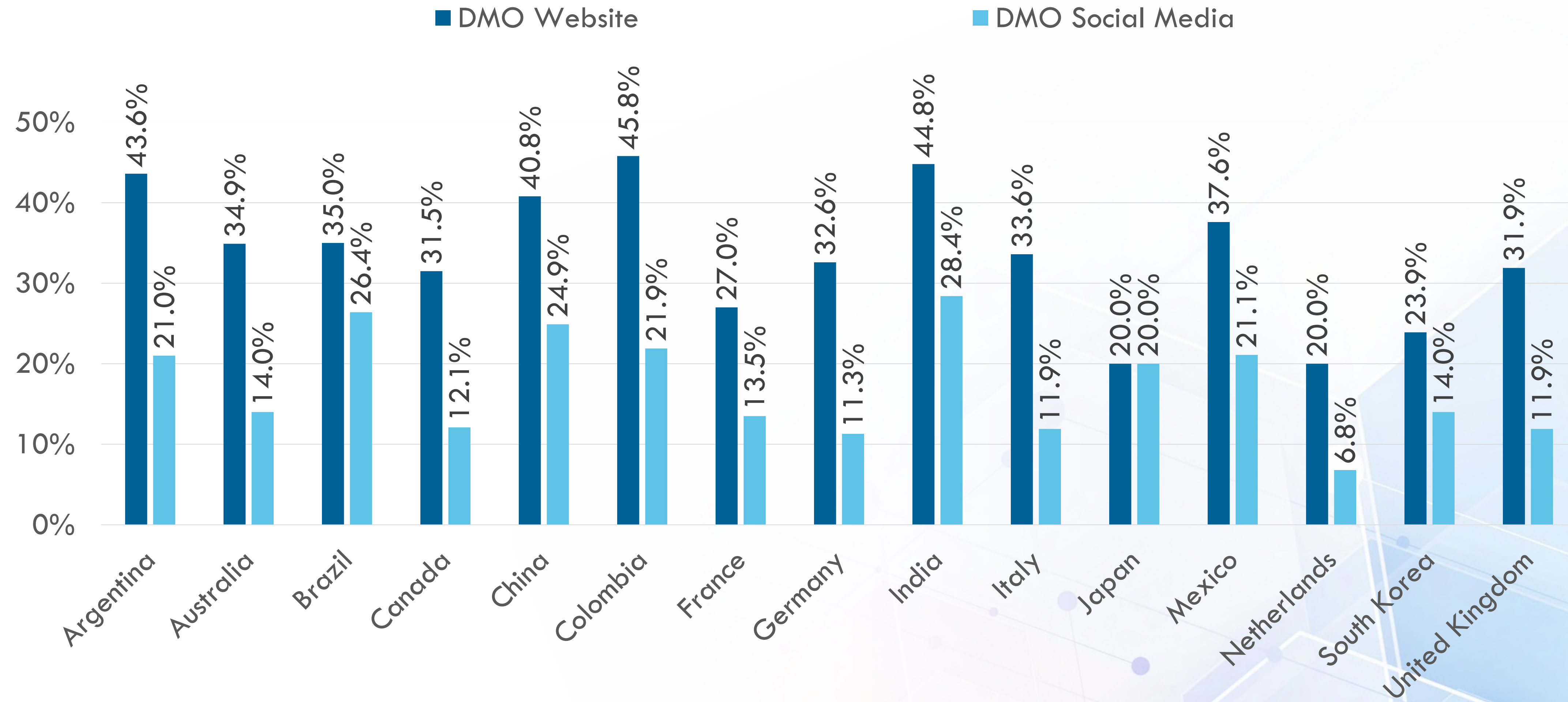
Q. If you were planning an international leisure trip, which of the following DIGITAL RESOURCES would you likely use to plan your trip? (Select all that apply)

SOCIAL MEDIA RESOURCES



Q. You said you would use social media to plan an international leisure trip. Which social channels are you most likely to use for this?

USE OF DMO CONTENT FOR TRAVEL PLANNING



Q. If you were planning an international leisure trip, which of the following DIGITAL RESOURCES would you likely use to plan your trip? (Select all that apply)



The American South as a Global Tourism Destination

The American South as a Global Tourism Destination

Familiar: 55%



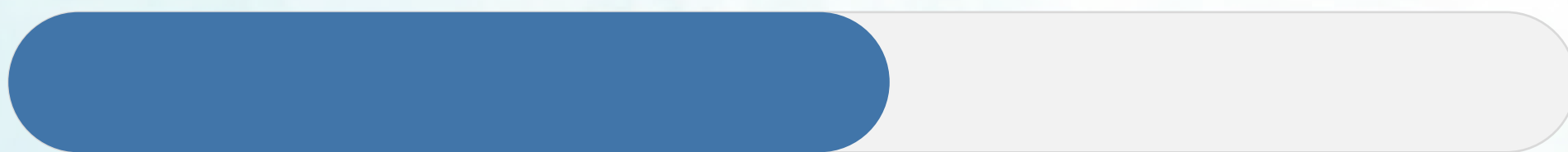
Appealing: 66%



Paid/Earned Recall: 48%



Likely to Visit in Next 5 Years: 56%



Q. Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation?
Q. How familiar are you with the attractions and things to see and do in each destination?
Q. In the PAST (12) MONTHS, do you recall seeing any travel advertisements, promotions or travel media coverage for any of these cities? (Select all you specifically recall seeing) Please include all types of advertising, promotion and media coverage: Online, magazines, television, radio, billboards, travel agency promotions or brochures, travel news stories, etc
Q. Which of these destinations are you likely to visit in the NEXT FIVE (5) YEARS? (Select all that apply)

Destination Familiarity

Question: How familiar are you with the attractions and things to see and do in each destination?

	TOP 3 BOX SCORE*
All Travel South Destinations	76.8%
New York City, New York	74.9%
San Francisco, California	73.2%
Los Angeles, California	74.7%
Las Vegas, Nevada	65.7%
Hawaii (anywhere in the state)	66.0%
Miami, Florida	66.2%
Washington, DC	63.7%
Niagara Falls, New York	62.7%
Orlando, Florida	61.5%
Anaheim/Disneyland, California	58.9%
Seattle, Washington	58.4%
San Diego, California	59.3%
Boston, Massachusetts	55.8%
Chicago, Illinois	55.4%
Houston, Texas	51.2%
Arizona	51.8%
Napa Valley, California	53.6%
Alaska	51.3%

	TOP 3 BOX SCORE*
Palm Springs, California	50.6%
Phoenix, Arizona	53.5%
New Orleans, Louisiana	48.1%
Texas (anywhere else in the state)	48.9%
Philadelphia, Pennsylvania	51.9%
Dallas/Fort Worth, Texas	47.0%
Salt Lake City, Utah	50.9%
Santa Barbara County, California	50.5%
Orange County, California	48.8%
Puerto Rico	46.2%
Reno, Nevada	48.3%
Atlantic City, New Jersey	47.6%
Austin, Texas	46.0%
Atlanta, Georgia	47.7%
Denver, Colorado	46.0%
Monterey County, California	45.5%
Colorado (areas in the state outside Denver)	43.9%
Newport Beach, California	47.0%
San Antonio, Texas	45.5%
Utah (anywhere else in the state)	48.2%

	TOP 3 BOX SCORE*
Portland, Oregon	46.8%
Sonoma County, California	45.6%
Minneapolis-St. Paul, Minnesota	43.0%
Lake Tahoe area	46.2%
Anchorage, Alaska	46.3%
Mississippi	45.6%
St. Petersburg/Clearwater, Florida	45.7%
Nashville, Tennessee	43.6%
Michigan	41.3%
Rural Nevada	44.5%
Pittsburgh, Pennsylvania	44.3%
Baltimore, Maryland	43.3%
Georgia	42.9%
North Carolina	44.5%
Virginia	43.1%
South Carolina	43.8%
Montana	40.7%
Memphis, Tennessee	43.6%

	TOP 3 BOX SCORE*
Kentucky	42.6%
St. Louis, Missouri	42.1%
Louisiana	39.8%
Rapid City, Mt. Rushmore, Badlands area	37.6%
West Virginia	40.7%
Charlotte, North Carolina	40.7%
Wyoming	37.6%
Alabama	41.0%
Savannah, Georgia	41.1%
Tennessee	42.7%
Missouri	39.1%
North Dakota	37.6%
Raleigh, North Carolina	39.4%
Arkansas	37.0%
Asheville, North Carolina	39.6%
South Dakota	37.7%
Lafayette, Louisiana	36.7%
Little Rock, Arkansas	39.7%
Birmingham, Alabama	37.6%
Mobile, Alabama	37.0%

Destination Appeal

Question: Given what you currently know and feel about these destinations, please use the scale below to state how appealing each is to you as a place to visit on a vacation.

	TOP 3 BOX SCORE*
All Travel South Destinations	86.2%
New York City, New York	80.0%
San Francisco, California	75.4%
Los Angeles, California	75.3%
Hawaii	73.8%
Miami, Florida	73.8%
Washington, DC	73.4%
Niagara Falls, New York	70.9%
Orlando, Florida	66.9%
Las Vegas, Nevada	66.9%
Boston, Massachusetts	65.9%
San Diego, California	62.5%
Philadelphia, Pennsylvania	61.8%
Chicago, Illinois	61.6%
Seattle, Washington	61.1%
Anaheim/Disneyland, California	61.1%
Napa Valley, California	57.1%
Houston, Texas	56.3%

	TOP 3 BOX SCORE*
Alaska	56.1%
Atlantic City, New Jersey	55.8%
New Orleans, Louisiana	55.6%
Phoenix, Arizona	55.2%
Palm Springs, California	54.5%
Puerto Rico	54.1%
Texas	53.5%
Arizona	53.3%
Nashville, Tennessee	52.4%
Santa Barbara County, California	52.3%
Denver, Colorado	52.3%
Atlanta, Georgia	52.0%
Dallas/Fort Worth, Texas	52.0%
Newport Beach, California	51.7%
Salt Lake City, Utah	51.5%
Orange County, California	51.1%
Mississippi	50.8%
Austin, Texas	50.7%
St. Petersburg/Clearwater, Florida	50.4%
Lake Tahoe area	50.4%

	TOP 3 BOX SCORE*
Colorado (outside Denver)	50.4%
Anchorage, Alaska	50.0%
San Antonio, Texas	49.9%
Memphis, Tennessee	49.7%
Sonoma County, California	48.5%
Portland, Oregon	48.3%
Reno, Nevada	48.3%
Monterey County, California	48.0%
Utah	47.8%
St. Louis, Missouri	47.0%
South Carolina	46.9%
North Carolina	46.8%
Virginia	46.8%
Baltimore, Maryland	46.4%
Minneapolis-St. Paul, Minnesota	46.1%
Tennessee	46.1%
Georgia	45.8%
Pittsburgh, Pennsylvania	45.8%
Montana	45.7%

	TOP 3 BOX SCORE*
Kentucky	45.5%
Louisiana	45.3%
Savannah, Georgia	45.1%
Rural Nevada	45.0%
Charlotte, North Carolina	44.9%
Michigan	44.8%
West Virginia	44.2%
Alabama	43.9%
Little Rock, Arkansas	43.7%
Rapid City, Mt. Rushmore	43.0%
Missouri	42.8%
Asheville, North Carolina	42.3%
Raleigh, North Carolina	41.9%
Lafayette, Louisiana	41.5%
Wyoming	40.8%
South Dakota	40.7%
Arkansas	40.6%
Birmingham, Alabama	40.5%
North Dakota	40.5%
Mobile, Alabama	39.9%

Likely to Visit

Question: Which of these destinations are you likely to visit within the next five years?

	LIKELY TO VISIT (NEXT 5 YEARS)
New York City, New York	60.9%
All Travel South Destinations	55.5%
Los Angeles, California	47.6%
Miami, Florida	42.0%
San Francisco, California	41.9%
Washington, DC	39.3%
Chicago, Illinois	33.2%
Hawaii	32.5%
Orlando, Florida	32.5%
Las Vegas, Nevada	26.3%
Niagara Falls, New York	24.8%
Boston, Massachusetts	24.0%
Houston, Texas	23.2%
San Diego, California	22.6%
New Orleans, Louisiana	22.6%
Denver, Colorado	19.5%
Dallas/Fort Worth, Texas	19.2%
Texas	18.8%
Philadelphia, Pennsylvania	17.6%

	LIKELY TO VISIT (NEXT 5 YEARS)
Austin, Texas	17.6%
San Antonio, Texas	16.5%
Seattle, Washington	16.3%
Anaheim/Disneyland, California	15.6%
Napa Valley, California	15.4%
Atlantic City, New Jersey	14.2%
Santa Barbara County, California	13.6%
Puerto Rico	13.5%
St. Louis, Missouri	13.4%
Phoenix, Arizona	12.9%
Colorado (outside Denver)	12.9%
Rapid City, Mt. Rushmore	12.8%
Atlanta, Georgia	12.8%
Minneapolis-St. Paul, Minnesota	12.2%
Mississippi	11.9%
Alaska	11.9%
Nashville, Tennessee	11.6%
Arizona	11.0%
Michigan	10.8%
Louisiana	10.8%

	LIKELY TO VISIT (NEXT 5 YEARS)
Sonoma County, California	10.7%
Memphis, Tennessee	10.6%
Salt Lake City, Utah	9.9%
North Carolina	9.3%
Montana	9.1%
North Dakota	9.0%
Palm Springs, California	8.9%
Georgia	8.9%
South Dakota	8.8%
Kentucky	8.5%
Virginia	8.3%
Missouri	8.3%
St. Petersburg/Clearwater, Florida	8.1%
Lake Tahoe area	8.1%
Arkansas	8.0%
Savannah, Georgia	8.0%
Reno, Nevada	7.9%

	LIKELY TO VISIT (NEXT 5 YEARS)
South Carolina	7.9%
Wyoming	7.6%
Portland, Oregon	7.5%
Utah	7.4%
Tennessee	7.4%
Anchorage, Alaska	7.1%
Rural Nevada	7.0%
Newport Beach, California	6.7%
Alabama	6.3%
Baltimore, Maryland	6.1%
Pittsburgh, Pennsylvania	5.8%
Little Rock, Arkansas	5.6%
West Virginia	5.6%
Orange County, California	5.1%
Asheville, North Carolina	4.9%
Charlotte, North Carolina	4.6%
Birmingham, Alabama	4.6%
Mobile, Alabama	4.0%
Raleigh, North Carolina	3.4%

Likely to Visit by International Market

Question: Which of these destinations are you likely to visit within the next five years?

	Argentina	Australia	Brazil	Canada	China	Colombia	France	Germany	India	Italy	Japan	Mexico	Netherlands	South Korea	United Kingdom
Alabama	5.3%	6.1%	6.7%	3.4%	6.6%	9.0%	5.9%	5.6%	14.4%	4.8%	4.8%	7.9%	4.0%	4.9%	4.6%
Arkansas	8.3%	5.8%	8.8%	3.9%	12.8%	9.0%	5.9%	7.3%	17.0%	6.8%	4.9%	14.4%	4.5%	7.5%	4.1%
Asheville, North Carolina	3.4%	3.5%	6.2%	3.6%	6.4%	5.1%	3.6%	4.2%	10.5%	3.4%	5.4%	6.1%	2.1%	4.7%	3.9%
Atlanta, Georgia	11.1%	9.9%	16.1%	7.9%	16.9%	19.8%	8.1%	10.5%	26.2%	11.0%	9.0%	18.0%	6.2%	11.1%	8.2%
Birmingham, Alabama	3.4%	3.0%	4.8%	2.7%	6.5%	4.4%	3.5%	4.1%	14.7%	3.9%	3.0%	5.6%	2.3%	2.7%	3.3%
Charlotte, North Carolina	6.8%	4.7%	5.4%	4.8%	3.6%	8.8%	3.5%	3.1%	6.9%	2.3%	4.3%	7.5%	1.2%	2.3%	3.3%
Georgia	6.7%	7.6%	12.4%	6.8%	9.3%	11.5%	4.9%	6.7%	20.6%	6.0%	7.0%	11.4%	5.1%	9.7%	6.0%
Kentucky	7.0%	8.2%	7.8%	5.8%	9.4%	9.6%	7.8%	7.5%	13.0%	6.5%	9.0%	15.4%	4.4%	8.2%	6.4%
Lafayette, Louisiana	5.9%	4.1%	4.6%	2.3%	9.5%	5.9%	5.4%	5.3%	13.2%	4.1%	2.8%	10.1%	3.1%	3.3%	3.3%
Little Rock, Arkansas	7.4%	14.4%	9.2%	9.1%	13.6%	7.6%	14.2%	12.4%	17.1%	9.7%	8.1%	11.5%	9.7%	6.2%	9.6%
Louisiana	13.3%	11.1%	11.7%	5.2%	17.1%	16.4%	19.0%	12.0%	18.2%	11.7%	7.4%	11.5%	5.1%	9.8%	7.6%
Memphis, Tennessee	10.0%	5.1%	9.9%	3.5%	12.0%	11.1%	10.5%	7.4%	18.9%	8.4%	4.4%	10.0%	3.9%	5.8%	3.3%
Mississippi	2.5%	2.7%	4.4%	2.6%	5.1%	6.0%	3.6%	3.4%	11.7%	2.8%	3.0%	4.1%	2.6%	2.7%	2.2%
Missouri	7.9%	16.6%	9.3%	15.8%	13.5%	10.3%	12.5%	12.4%	19.2%	8.5%	9.3%	11.4%	8.9%	5.3%	13.2%
Mobile, Alabama	33.5%	24.1%	31.5%	21.6%	15.1%	41.3%	24.6%	19.1%	23.9%	22.9%	9.0%	27.3%	13.6%	10.3%	20.8%
Nashville, Tennessee	9.3%	9.0%	11.9%	9.6%	8.6%	12.9%	5.1%	7.6%	18.1%	6.9%	5.3%	14.5%	5.4%	7.7%	5.7%
New Orleans, Louisiana	2.0%	3.1%	3.6%	3.8%	3.6%	5.5%	2.3%	1.6%	7.4%	1.8%	3.6%	5.0%	0.7%	3.5%	2.2%
North Carolina	5.4%	7.5%	7.4%	6.8%	13.5%	6.5%	7.0%	7.3%	19.7%	6.8%	5.7%	7.3%	5.4%	6.8%	6.7%
Raleigh, North Carolina	6.3%	8.5%	9.3%	9.5%	7.8%	10.1%	6.1%	5.8%	16.7%	6.5%	3.9%	11.5%	5.0%	5.2%	5.4%
Savannah, Georgia	12.0%	8.6%	15.4%	7.1%	24.3%	10.9%	14.4%	10.4%	31.8%	11.9%	14.8%	11.9%	5.5%	14.5%	8.1%
South Carolina	6.0%	8.7%	8.8%	6.9%	8.1%	9.4%	8.2%	8.4%	11.3%	5.7%	4.5%	9.8%	3.8%	5.6%	5.4%
St. Louis, Missouri	9.5%	8.2%	11.3%	6.1%	9.9%	9.9%	8.1%	5.2%	16.7%	7.3%	3.2%	10.6%	3.2%	7.6%	6.3%
Tennessee	4.5%	4.8%	6.8%	4.4%	6.8%	6.0%	3.8%	4.2%	14.8%	4.5%	3.6%	7.0%	2.5%	4.9%	4.1%
Virginia	5.3%	6.1%	6.7%	3.4%	6.6%	9.0%	5.9%	5.6%	14.4%	4.8%	4.8%	7.9%	4.0%	4.9%	4.6%
West Virginia	8.3%	5.8%	8.8%	3.9%	12.8%	9.0%	5.9%	7.3%	17.0%	6.8%	4.9%	14.4%	4.5%	7.5%	4.1%

PROFILE OF TRAVELERS HOT FOR THE SOUTH

Demographics & International Travel Profile

- **Younger travelers** (38 years old on average vs 39)
- **Somewhat higher average household incomes** (\$76K USD vs. \$74K)
- 36% have children in their household
- Have **15.2 days available** per year for international travel
- Anticipates spending **\$3,889 USD** on international travel this year

International Travel Desires

- Welcoming environment to people of diverse identities
- Cultural diversity in the local population of the country
- Cultural diversity in the tourists that visit the country
- Sustainability and carbon footprint
- Trendy—being a “hot” place to go at the moment

U.S. Trip Desires

- Plans to spend **13 days** on their next US trip visiting **4.3 destinations**
- Planning window for U.S. Trip: **11.8 weeks out**
- Top 10 Travel Motivators to U.S:
 - Food & cuisine
 - Shopping
 - Bucket list destination
 - Adventure
 - Arts and culture
 - Theme or amusement parks
 - Iconic experiences
 - Connecting with nature
 - History

THANK YOU

THANK YOU

THANK YOU