

TRAVEL SOUTH  USA

# ARKANSAS



**INTERNATIONAL MARKETS**

November 2024

# International Travel

1. Forecasts indicate international travel to the Travel South Region will rebound to pre-pandemic activity in 2025
2. International traveler spending is expected to surpass \$8B in 2024 and \$10B in 2025
3. Recovery has been impacted by factors such as flight availability, visa wait times, safety measures, and a macroeconomic slowdown
4. Increased consumer interest & a resilient global economy continue to bolster international demand
5. International travel is critical to contributing to tourism diversification and integrated economic developments



*Deeper Dive reports, compiled by **Esra Calvert**, utilize data from Travel South's primary data affiliates, with the TSUSA Global Partner Program + Brand USA, + Tourism Economics + Future Partners, and secondary data to provide a multifaceted view of the markets.*

# Overview

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September 2024

## **Visitor Economy**

Overview of Historic & Forecast Visitation and Spending by Tourism Economics

## **Flights**

Flights from the Largest Airport

## **Exports (Goods)**

Exports Market snapshot by the Office of Trade and Economic Analysis

## **International Students**

International Student Survey Results from Open Door

## **Visitor Perception**

Perception of International Visitors who are likely to travel to the U.S. or a Travel South destination by Brand USA and Future Partners

## **Resources**

Links to Market Profiles, along with other Travel South resources

# Arkansas' International Visitor Economy

## *Highlighting the State's Global Interconnectivity*



### **Significant Recovery**

- Witnessed a significant recovery in 2023
- Spending reached **\$98 million** and **102,000** visitors
- By 2025, forecasted to reach **\$139 million** and **135,000** visitors

### **US Inbound Travel Rebound**

- Arkansas' spending index is poised to hit **99 out of 100** (based on the **2019 to 2024 projected**)
- Fueled by visitors from **United Kingdom/Ireland, Canada, India, DACH Region, Mexico, Australia, Brazil, South Korea, Japan, and China**, accounting for **56%** of the state's 2023 international inbound spending

### **Economy Boosted by Exports in Goods**

- **1,600** companies exported **\$6.5 billion** worth of goods
- Exports to **Canada, Mexico, Japan, China and United Kingdom** are among the top origin markets of visitation
- **India** accounts for three out of ten international student population
- **77%** of visits are non-business related

# Arkansas' International Visitor Economy

## *Highlighting the State's Global Interconnectivity, cont.*

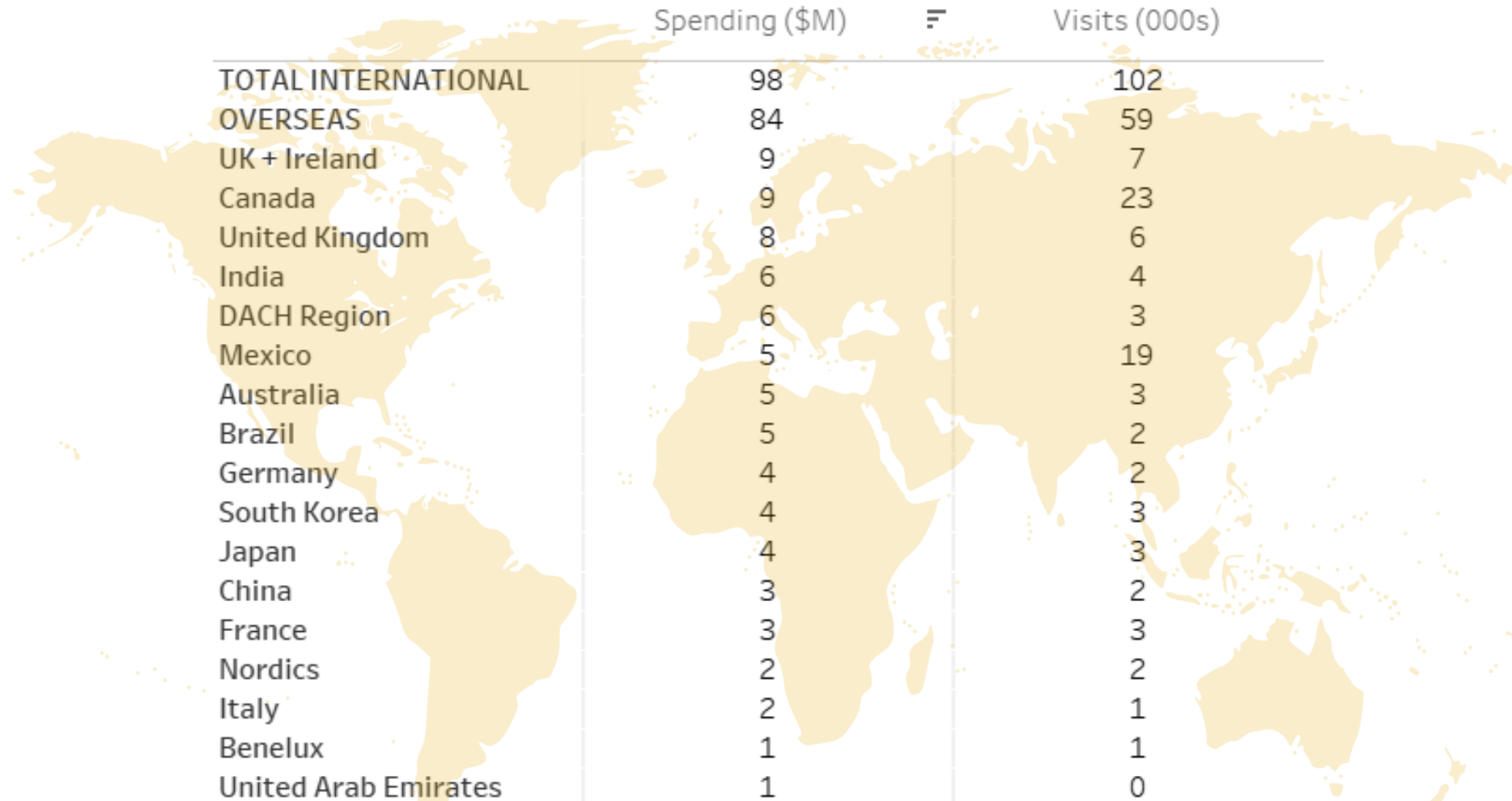
- Arkansas' investment in regional marketing amplifies the state's brand internationally and targets high-value travelers, enhancing regional economies and diversifying the visitor economy.
- Collaborative marketing efforts under Travel South USA (TSUSA) further strengthen Arkansas' strategic advantage.
- Major gateway airports like Atlanta, Chicago O'Hare and Dallas allow easy access to the state.
- Proximity to neighboring states— Louisiana, Missouri, Tennessee, and Mississippi— attracts international travelers interested in the Travel South's natural beauty, cultural heritage, and connectivity, thus enriching Arkansas' tourism landscape.



# Visitor Economy

## 2023 INTERNATIONAL TRAVEL TO ARKANSAS

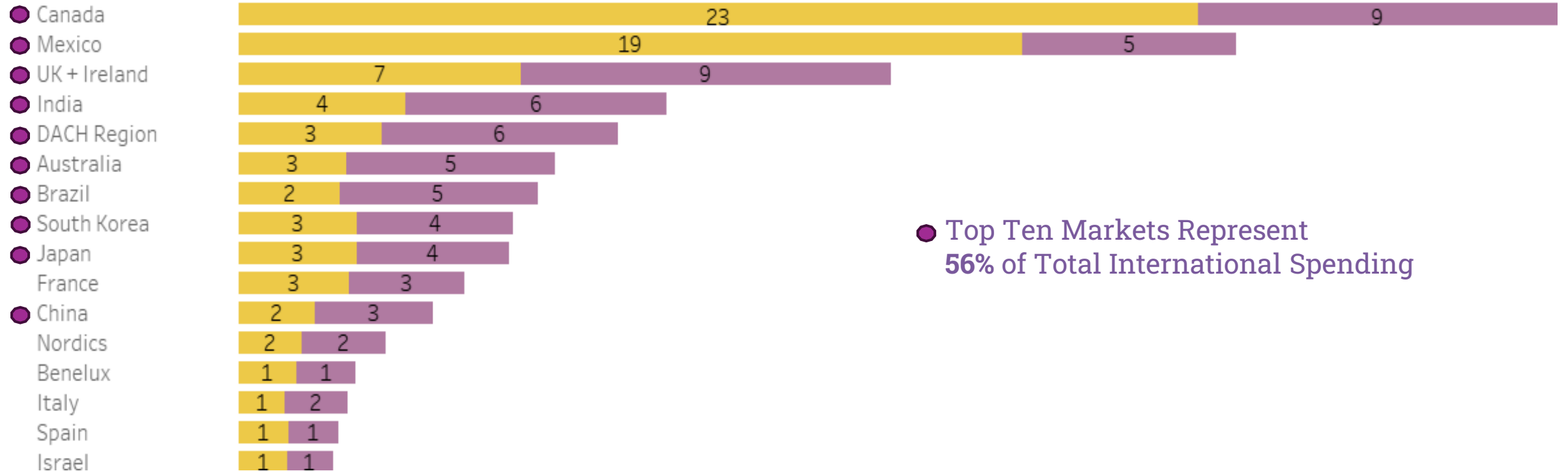
**\$98 in Spending & 102,000 Visits**



	Spending (\$M)	≡	Visits (000s)
TOTAL INTERNATIONAL	98		102
OVERSEAS	84		59
UK + Ireland	9		7
Canada	9		23
United Kingdom	8		6
India	6		4
DACH Region	6		3
Mexico	5		19
Australia	5		3
Brazil	5		2
Germany	4		2
South Korea	4		3
Japan	4		3
China	3		2
France	3		3
Nordics	2		2
Italy	2		1
Benelux	1		1
United Arab Emirates	1		0

# ARKANSAS

## 2023 Top Visits + Spending by Market



● Top Ten Markets Represent 56% of Total International Spending

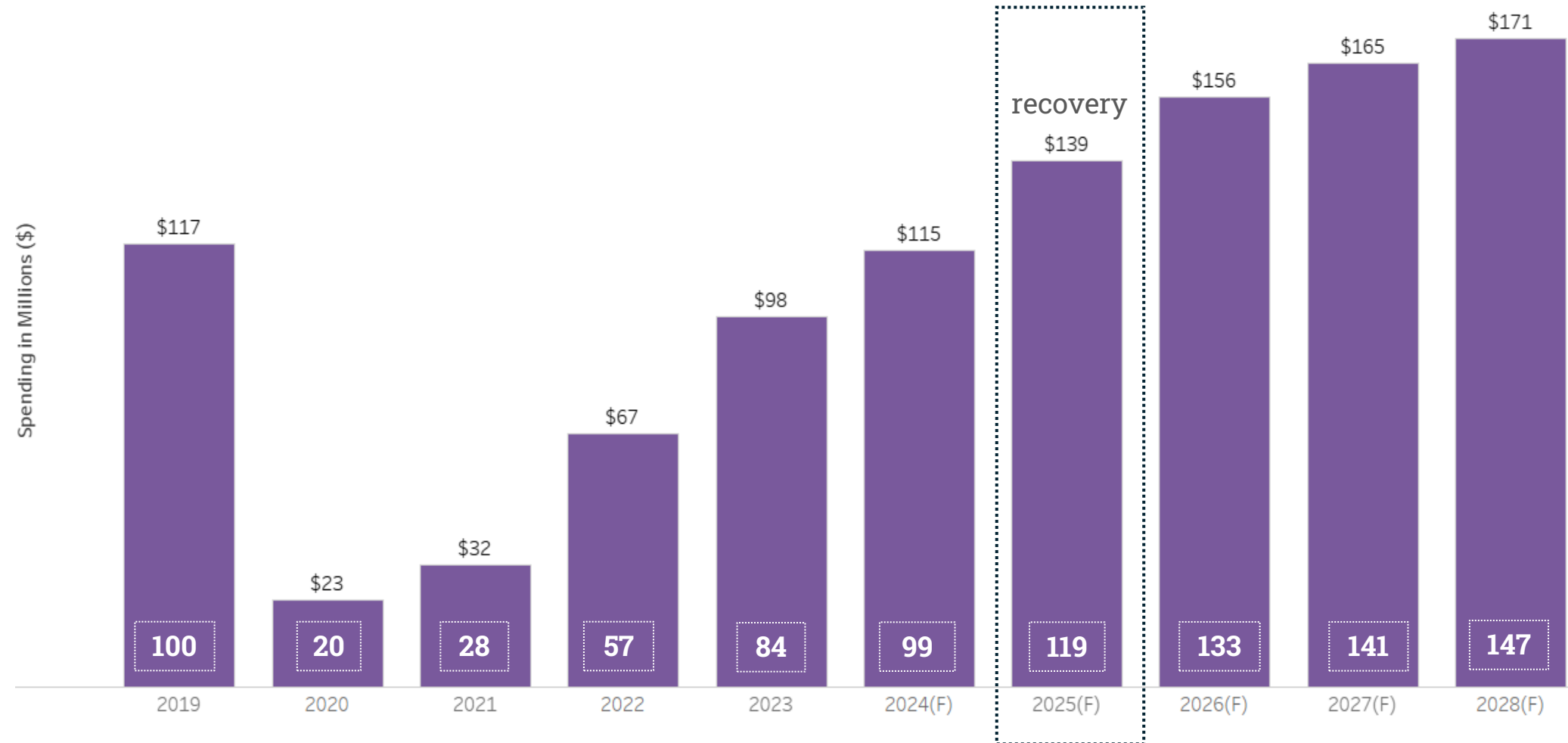
■ Spending (\$M)  
■ Visits (000s)



# ARKANSAS



## Visitor Spending & Pre-pandemic Recovery



The 2019 data, standardized with the base year set to 100 (2019=100), ensures uniform comparability across visitor spending by providing a consistent reference point to the pre-pandemic period.

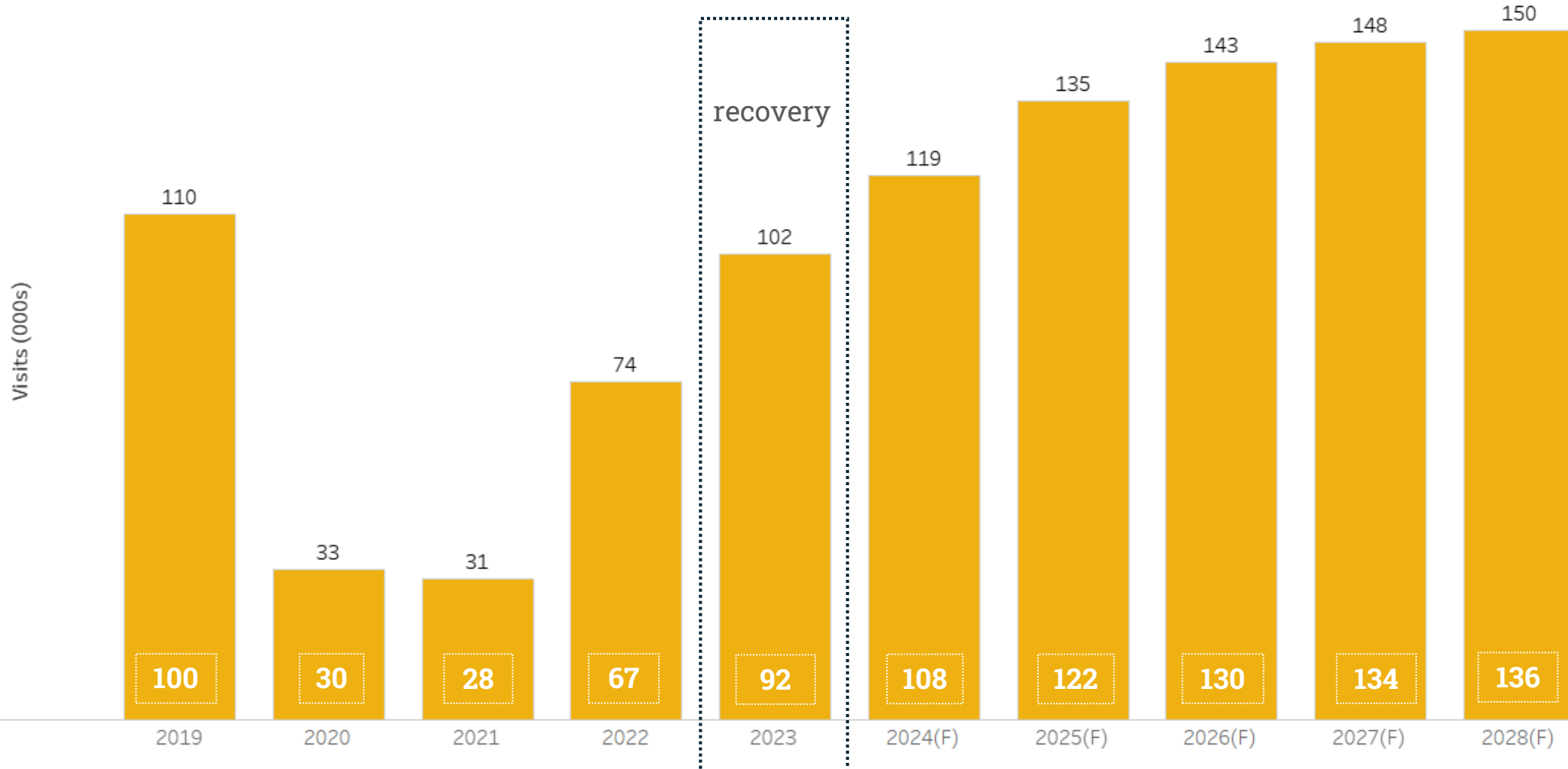
Note: (F)=Forecast

Source: Tourism Economics (11.06.2024)

# ARKANSAS



## Visitor Volume & Pre-pandemic Recovery



The 2019 data, standardized with the base year set to 100 (2019=100), ensures uniform comparability across visitor volume by providing a consistent reference point to the pre-pandemic period.

Note: (F)=Forecast

# ARKANSAS



## \$115M Projected Spending in 2024

- Tourism Economics estimates international travel to reach **\$115M** and **119,000** visits in **2024**
- When comparing spending by market - **United Kingdom/Ireland, Canada, India, Australia, and Japan** are forecasted to be amongst the top five, with **Canada, India, and Australia** leading in recovery

	Spending (\$M)	Spending Recovery Index (2019=100)	Visits (000s)
TOTAL INTERNATIONAL OVERSEAS	115	99	119
UK + Ireland	10	94	8
Canada	9	137	25
United Kingdom	9	91	7
India	7	128	5
Australia	7	142	3
Japan	6	78	5
DACH Region	6	109	4
Mexico	6	68	23
China	6	109	3
Brazil	5	98	3
Germany	4	111	3
South Korea	4	80	3
France	3	148	3
Nordics	2	65	2
Benelux	2	97	2
Italy	2	128	1
Spain	1	162	1

Source: Tourism Economics  
(11.06.2024)

# ARKANSAS

## \$139M Projected Spending in 2025

- Tourism Economics estimates international travel to reach **\$139M** and **135,000** visits in **2025**,
- When comparing spending by market –**United Kingdom/Ireland, Canada, India, Japan and Australia** are forecasted to be amongst the top five and leading in recovery

	Spending (\$M)	Spending Recovery Index (2019=100)	Visits (000s)
TOTAL INTERNATIONAL OVERSEAS	139	119	135
OVERSEAS	120	119	81
UK + Ireland	11	111	9
Canada	11	159	27
United Kingdom	10	107	8
India	8	144	5
Japan	8	101	6
Australia	8	175	4
China	8	140	5
Mexico	8	86	28
DACH Region	7	126	4
Brazil	7	123	3
Germany	5	129	3
South Korea	5	97	4
France	4	174	3
Nordics	3	82	2
Benelux	2	117	2
Italy	2	143	1
Israel	2	80	2

# ARKANSAS



## Visitor Spending Recovery Growth

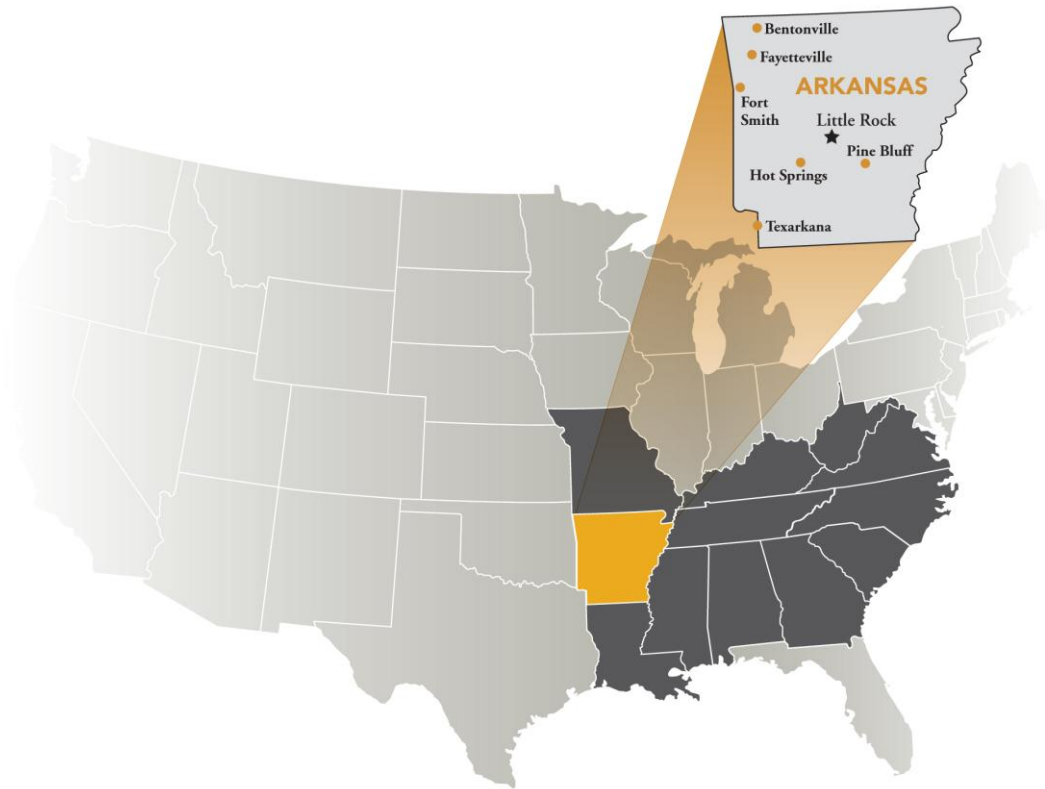
		2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending Recovery Index (2019=100)	Australia	100	15	4	28	108	142	175
	Austria	100	14	22	112	83	85	97
	Belgium	100	14	14	61	96	111	130
	Benelux	100	13	15	65	82	97	117
	Brazil	100	18	27	82	91	98	123
	Canada	100	21	12	69	126	137	159
	China	100	25	13	14	51	109	140
	DACH Region	100	12	19	83	101	109	126
	Denmark	100	14	17	51	58	63	76
	Finland	100	18	10	42	46	59	71
	France	100	13	26	87	135	148	174
	Germany	100	12	19	75	100	111	129
	India	100	23	32	81	110	128	144
	Ireland	100	13	11	89	123	138	159
	Italy	100	12	19	84	118	128	143
	Japan	100	17	13	18	45	78	101
	Mexico	100	32	42	57	57	68	86
	Netherlands	100	13	16	67	77	91	112
	Nordics	100	15	14	49	60	65	82
	Norway	100	14	9	36	49	50	62
	OVERSEAS	100	19	28	56	83	99	119
	South Korea	100	25	28	34	74	80	97
	Spain	100	13	32	100	135	162	183
	Sweden	100	17	14	58	77	81	106
	Switzerland	100	11	18	94	112	115	132
	TOTAL INTERNATIONAL	100	20	28	57	84	99	119
	UK + Ireland	100	13	13	75	88	94	111
United Kingdom	100	13	13	75	86	91	107	

The 2019 data, standardized with the base year set to 100 (2019=100), ensures uniform comparability across visitor spending by providing a consistent reference point to the pre-pandemic period.

Note: (F)=Forecast

Source: Tourism Economics (11.06.2024)

# Flights



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### One-Stop Flights to Key Markets

London, Dublin, Glasgow

Frankfurt, Munich, Stuttgart, Vienna, Zurich

Copenhagen

Paris, Nice

Amsterdam, Brussels

Rome, Milan, Venice

Barcelona, Madrid

Toronto, Vancouver, Montreal, Calgary, Ottawa

Mexico City, Cancun

Sao Paulo, Rio de Janeiro

Sydney

Beijing, Shanghai

Delhi, Mumbai

Seoul

Tokyo

Taipei

# Exports (Goods)





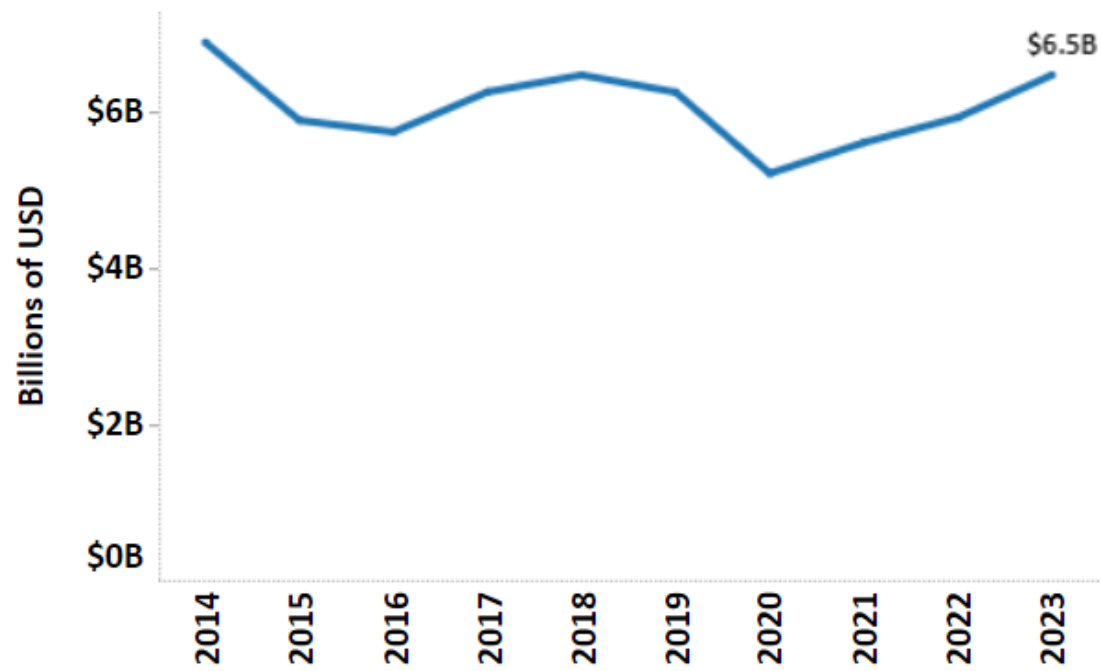
**EXPORTS IN GOODS**  
*2023*

**\$6.5 Billion**

**TOP COUNTRIES**

- CANADA
- MEXICO
- JAPAN
- CHINA
- FRANCE
- UK

**Goods Exports to the World**  
2014-2023



**Goods Exports by Country**  
(in millions)

Partner	2023
World	\$6,450
Canada	\$1,631
Mexico	\$1,106
Japan	\$394
China	\$346
France	\$250
United Kingdom	\$219
Australia	\$142
Indonesia	\$133
Netherlands	\$118
Italy	\$117
India	\$105
Switzerland	\$105
Turkey	\$96
Qatar	\$93
Germany	\$78

EXPORTERS

1,625

Arkansas companies exported goods in  
2021

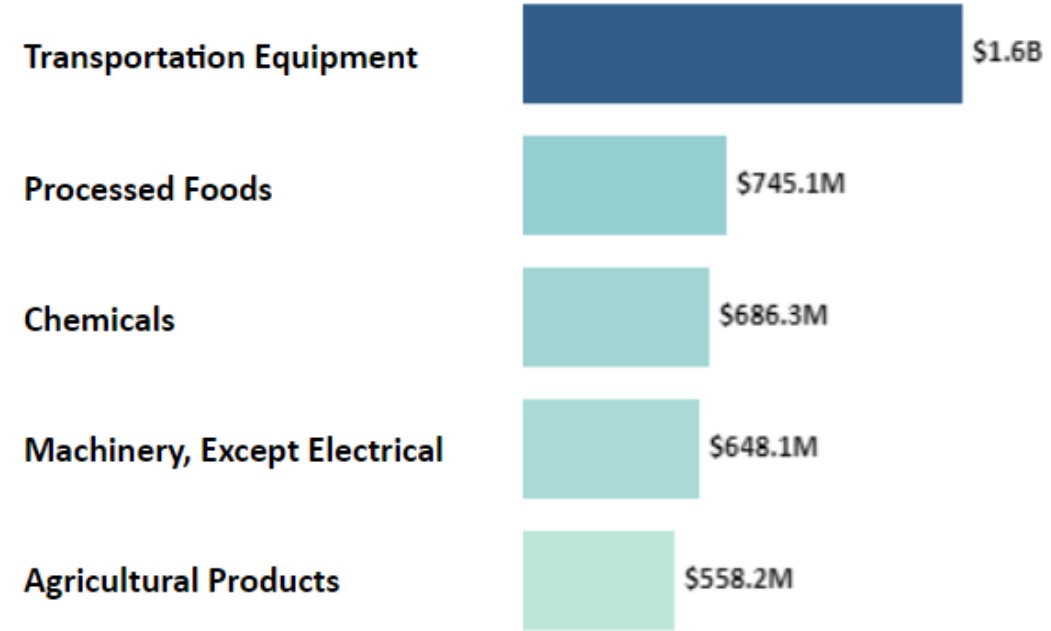
78%

of them were small- and medium-sized  
enterprises (SMEs)\*

\* SMEs are businesses that employ fewer than 500 employees.

TOP TRADE SECTORS

Arkansas Top Goods Export Sectors in 2023



# International Students

# ARKANSAS

INTERNATIONAL  
STUDENTS  
*2022/23*

5,680

STUDENT-VISIT  
RATIO

4.1%

INDEXED  
STUDENT-VISIT  
RATIO  
U.S. = 100

479

# ARKANSAS

## INTERNATIONAL STUDENTS, 2022/23



**5,680**

International Students



**34**

Rank in the United States\*



**24.0**

% Change from  
Previous Year



**\$146,634,110**

Estimated International  
Student Expenditure\*\*

## LEADING PLACES OF ORIGIN

Place of Origin	% Total
India	<b>30.8</b>
China	<b>5.1</b>
Japan	<b>4.5</b>
Bahamas	<b>4.4</b>
Nepal	<b>4.2</b>

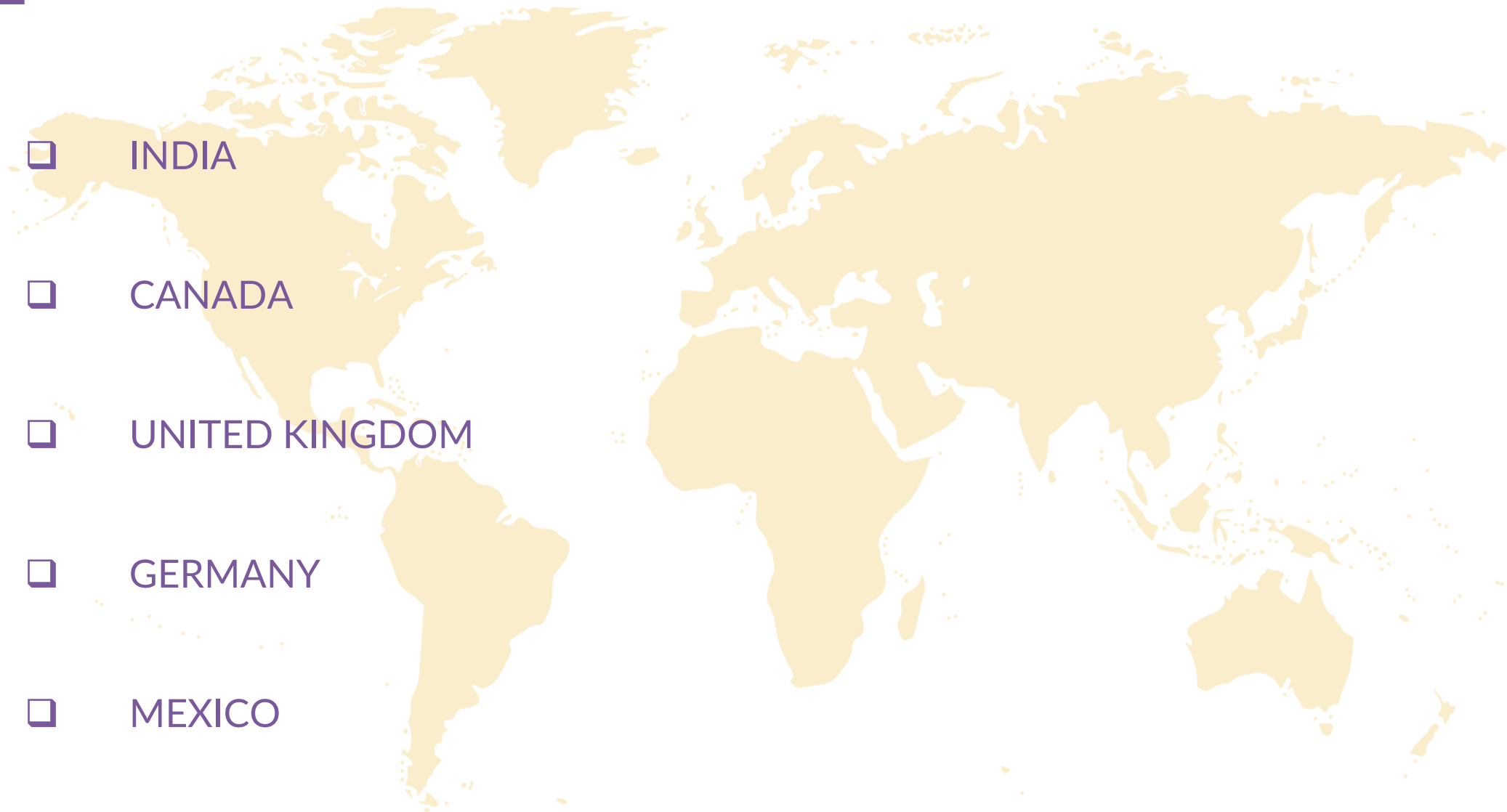
## LEADING INSTITUTIONS

Institution	Total
University of Arkansas - Fayetteville	<b>1,530</b>
Southern Arkansas University - Magnolia	<b>1,095</b>
Arkansas State University - Jonesboro	<b>915</b>
University of Arkansas - Little Rock	<b>669</b>
University of Central Arkansas	<b>458</b>

# Visitor Perception

# MARKET PROFILES

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INDIA

CANADA

UNITED KINGDOM

GERMANY

MEXICO



# INDIA



POPULATION  
*2023*

1.4B

REAL GDP  
GROWTH  
*2024 PROJECTION*

6.3%

CURRENCY  
RATE  
*2023*

82.57

INFLATION  
RATE  
*2024 PROJECTION*

4.6%

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
GOODS & SERVICES  
EXPORTS*

27.1%

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
SERVICES  
EXPORTS*

59.4%

# INDIA

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83%

Likelihood to Visit Travel South  
in the next Five Years

Note: Indian visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:

- 34.3% Shopping
- 28.8% Safety
- 26.9% Restaurants and food
- 26.5% Beaches
- 25.8% Entertainment, events, shows
- 25.3% Hotels and lodging
- 23.6% Family fun
- 21.3% Sightseeing tours
- 19.6% Historical attractions
- 19.3% National Parks
- 19.0% Museums and culture
- 18.5% Ways to experience the American lifestyle
- 18.5% Theme parks
- 17.5% Availability of direct flight service
- 17.4% Important or iconic attractions
- 16.3% Ways to experience nature
- 15.6% Opportunities for relaxation
- 14.5% Ideas for adventurous travel
- 14.1% Transportation and how to get around
- 12.3% Outdoor activities (biking, hiking, etc.)
- 11.9% Snow/winter activities
- 11.8% Touristy attractions to avoid
- 11.3% Commitment to being eco-friendly
- 11.1% Things to do outside the large cities
- 9.1% Recommendations from local residents
- 8.6% Level of crowds
- 7.8% Professional sporting events
- 7.6% Sample trip itineraries
- 6.1% Off-the-beaten path attractions



Source: Future Partners (2024)

# INDIA

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Recall of “Buzz”: Travel South Destinations

68%

Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.

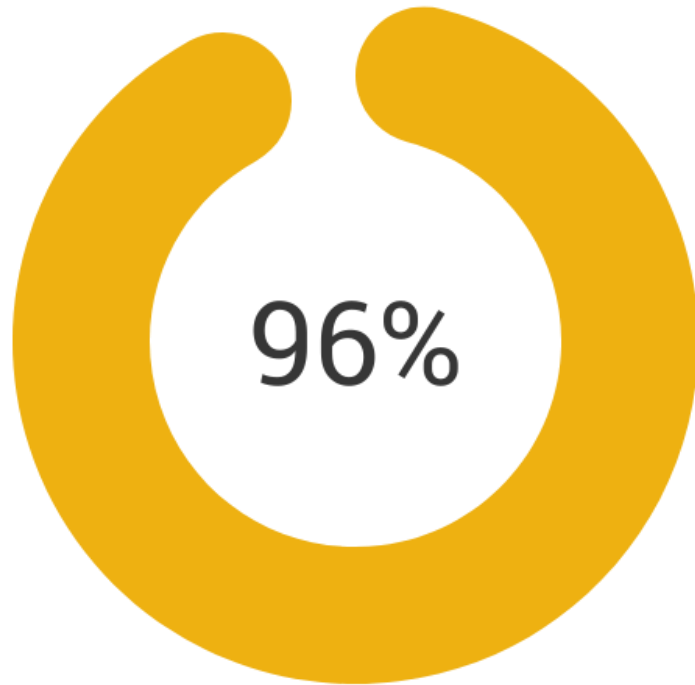


Note: Indian visitors who are Likely to Travel Internationally

Source: Future Partners (2024)

# INDIA

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## APPEAL

Destination Appeal of TRAVEL SOUTH as a place to visit on a vacation



## FAMILIARITY

Destination Familiarity with the attractions and things to see and do in TRAVEL SOUTH

# INDIA

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3.9

## Average Number of Leisure International Trips

Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region



1 Trip

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43%

2 Trips

---

27%

3-4 Trips

---

11%

5+ Trips

---

19%

Source: Brand USA (Aug. 2023)

# INDIA

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3.2

Average Number of Bleisure Trips  
% of Business Trips with a Leisure Extension

Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region



**1+ Trips**

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87%

**1 Trip**

---

32%

**2 Trips**

---

25%

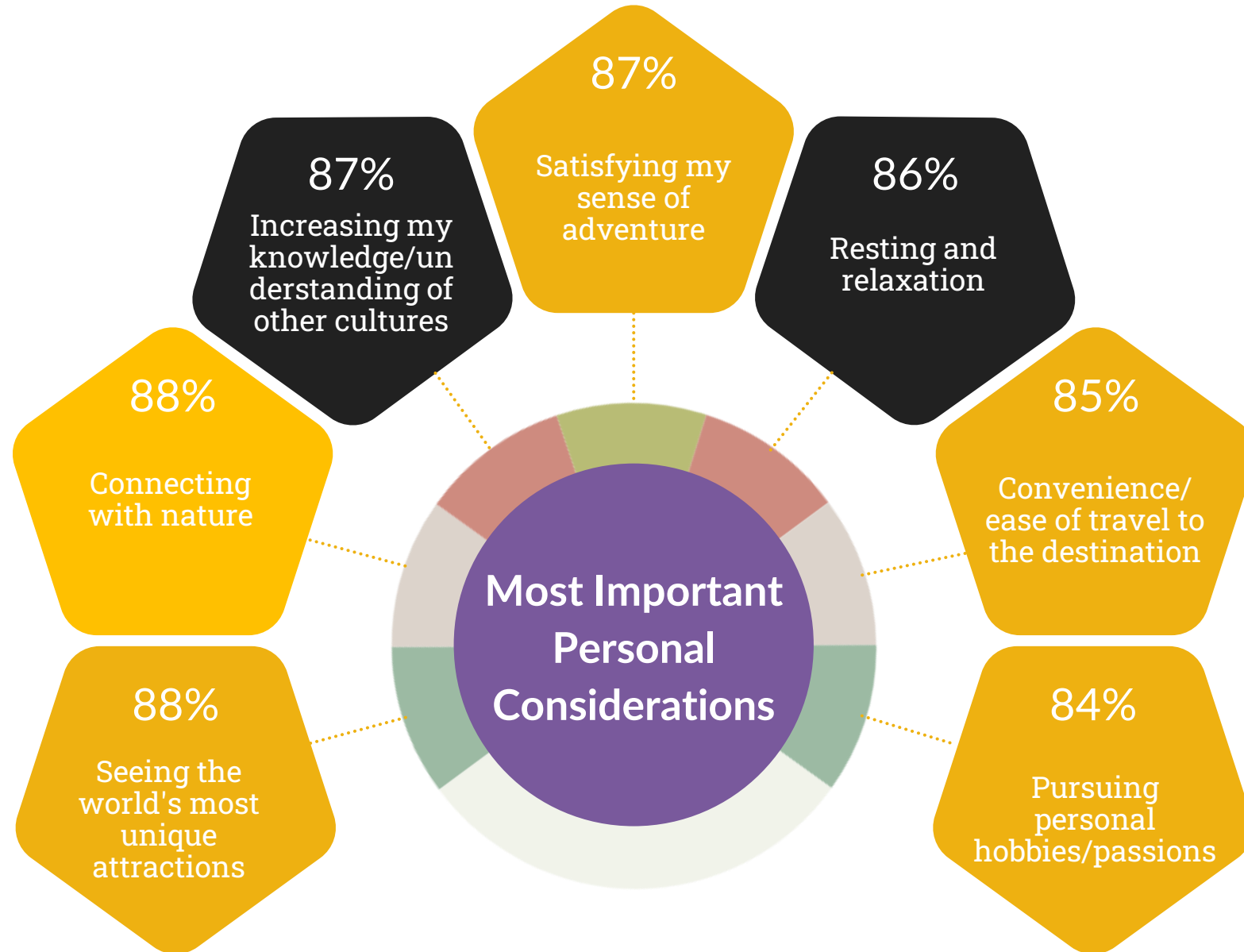
**3+ Trips**

---

31%

Source: Brand USA (Aug. 2023)

# INDIA



Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# INDIA

## Most Important When Choosing a Destination

- 52%** Natural features/landscapes in the destination
- 52%** Cultural offerings at the destination
- 51%** Ease of travel to destination
- 50%** Variety of leisure attractions
- 45%** Sustainability certification of accommodation and attractions
- 45%** Accessibility of services and activities for all
- 44%** Activities available at the destination
- 44%** Destination promotes eco-friendly practices

## Most Discouraging From Visiting a Destination

- 43%** Personal safety concerns
- 40%** Lack of information for me to plan my trip
- 40%** Inconvenience of travel to the destination
- 39%** Political climate not aligning with personal views
- 39%** Cleanliness in the destination
- 39%** Environmental responsibilities and efforts
- 38%** Visa requirements/entry procedures
- 38%** Crowdedness

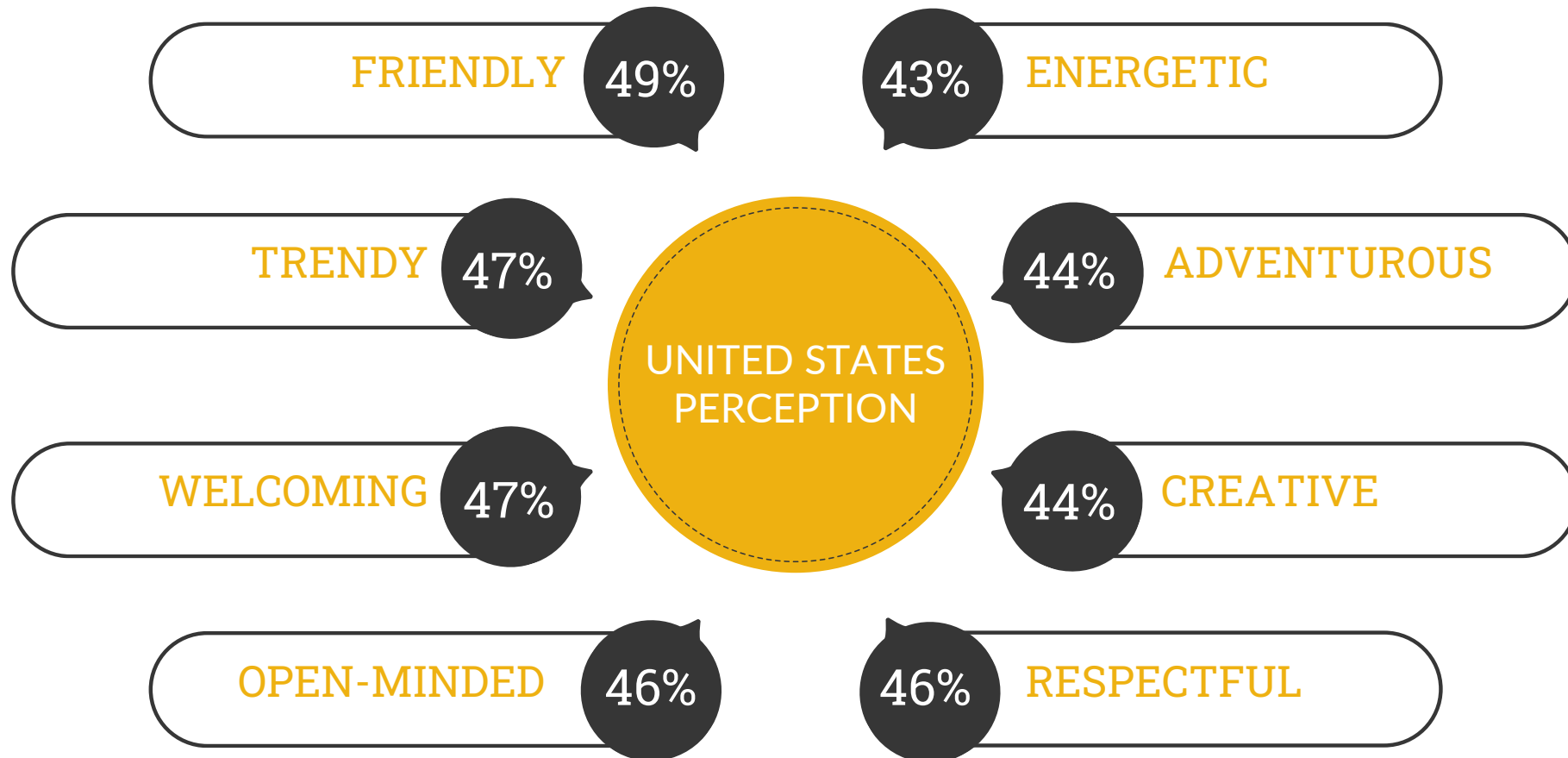
Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)



# INDIA

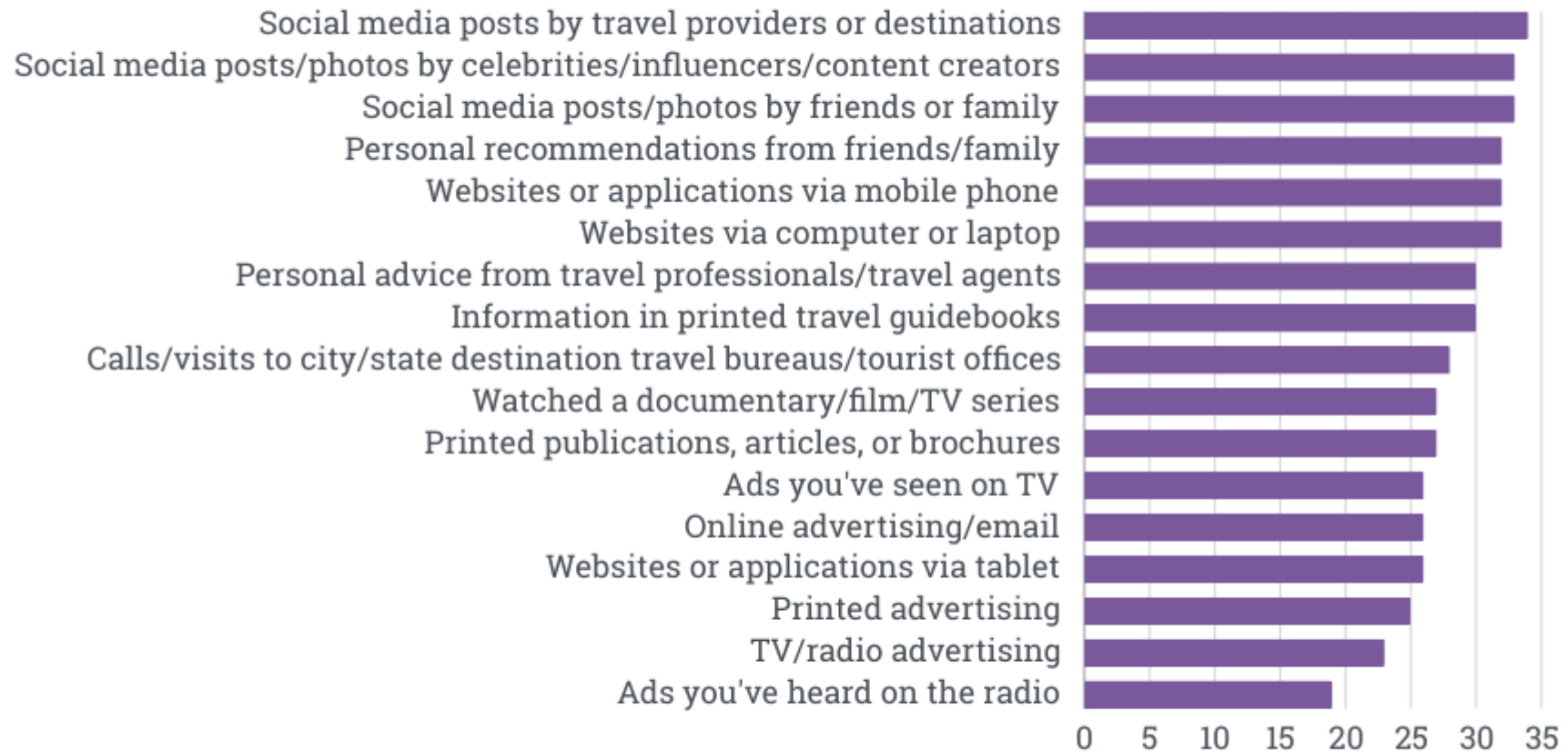
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Source: Brand USA (Aug. 2023)

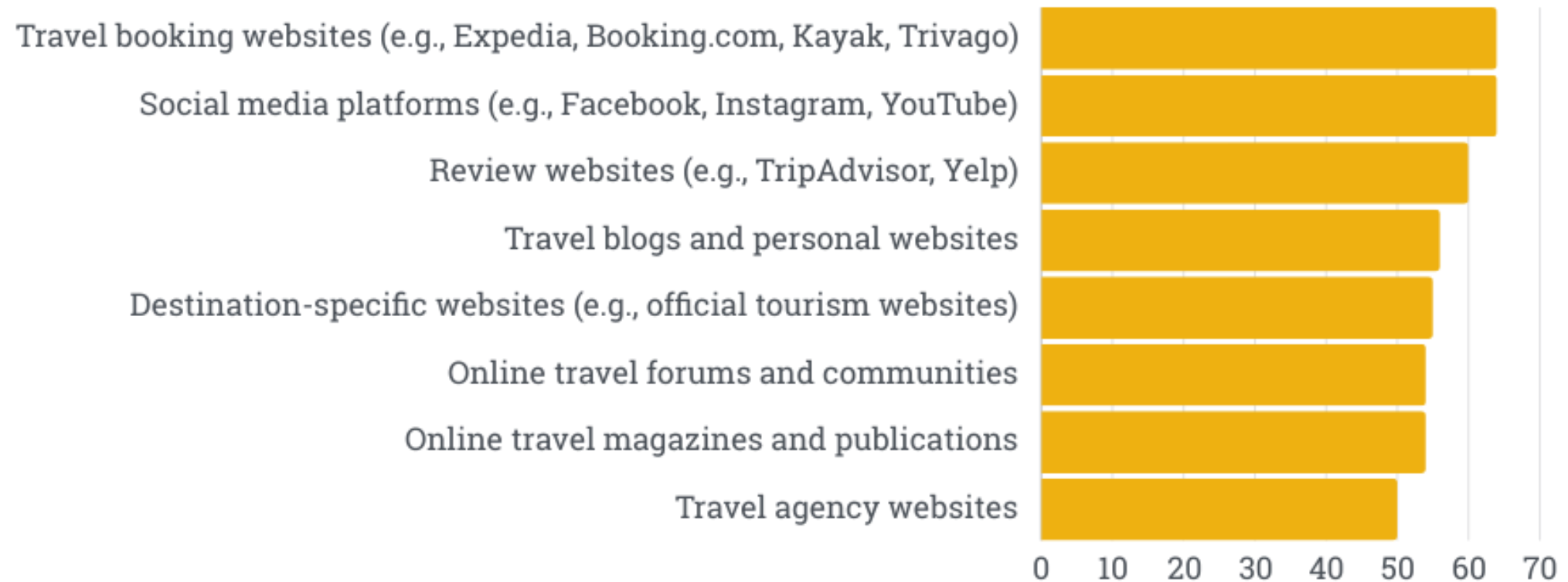
## Sources of Information for Destination Selection



Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Websites Used for Destination Selection



Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Social Media Participation

Instagram	92%
YouTube	92%
Facebook/META	84%
Twitter	80%
LinkedIn	74%
Snapchat	68%
Pinterest	53%
TikTok	33%
Reddit	32%
Tumblr	19%

Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# INDIA

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## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

83%

With higher temperatures each year, travelers will try to seek out cooler places

80%

I'll be more proactive in reducing the impact of my travel on the environment

78%

Climate change will have a significant impact on my leisure travel in the next five years

72%

Global wars/strife will impact the destinations I visit in 2024

63%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it

# INDIA

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## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

56%

I often bring work with me to do when I am on holiday

55%

Artificial Intelligence (AI) tools (like ChatGPT) will be commonly used by travelers to plan their trips

52%

Tipping etiquette in the U.S. confuses me

37%

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations

36%

The "selfie" photograph will become a relic of the past

# CANADA



POPULATION  
*2023*

REAL GDP  
GROWTH  
*2024 PROJECTION*

CURRENCY  
RATE  
*2023*

INFLATION  
RATE  
*2024 PROJECTION*

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
GOODS & SERVICES  
EXPORTS*

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
SERVICES  
EXPORTS*

40M

1.6%

1.35

2.4%

5.5%

28.0%

# CANADA

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50%

Likelihood to Visit Travel South  
in the next Five Years

## Most Important Content For Destination Decisions:



- 40.9% Hotels and lodging
- 37.9% Restaurants and food
- 36.8% Safety
- 28.4% Shopping
- 26.8% Beaches
- 21.9% Historical attractions
- 21.6% Entertainment, events, shows
- 21.5% Family fun
- 21.5% Availability of direct flight service
- 20.1% Transportation and how to get around
- 19.5% Opportunities for relaxation
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- 14.0% Ways to experience nature
- 13.3% Level of crowds
- 11.6% Things to do outside the large cities
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- 10.3% Touristy attractions to avoid
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- 9.9% Recommendations from local residents
- 8.6% Ideas for adventurous travel
- 8.5% Off-the-beaten path attractions
- 7.1% Ways to experience the American lifestyle
- 7.1% Sample trip itineraries
- 3.9% Commitment to being eco-friendly
- 2.9% Snow/winter activities



# CANADA

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Recall of “Buzz”: Travel South Destinations

22%

Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.



Note: Canadian visitors who are Likely to Travel Internationally

Source: Future Partners (2024)

# CANADA

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## APPEAL

Destination Appeal of TRAVEL SOUTH  
as a place to visit on a vacation



## FAMILIARITY

Destination Familiarity with the attractions and  
things to see and do in TRAVEL SOUTH

# CANADA

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1 Trip

---

31%

2 Trips

---

31%

3-4 Trips

---

21%

5+ Trips

---

17%

2.9

## Average Number of Leisure International Trips

Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# CANADA

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# 1.2

**Average Number of Bleisure Trips**  
% of Business Trips with a Leisure Extension

**1+ Trips**

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46%

**1 Trip**

---

20%

**2 Trips**

---

11%

**3+ Trips**

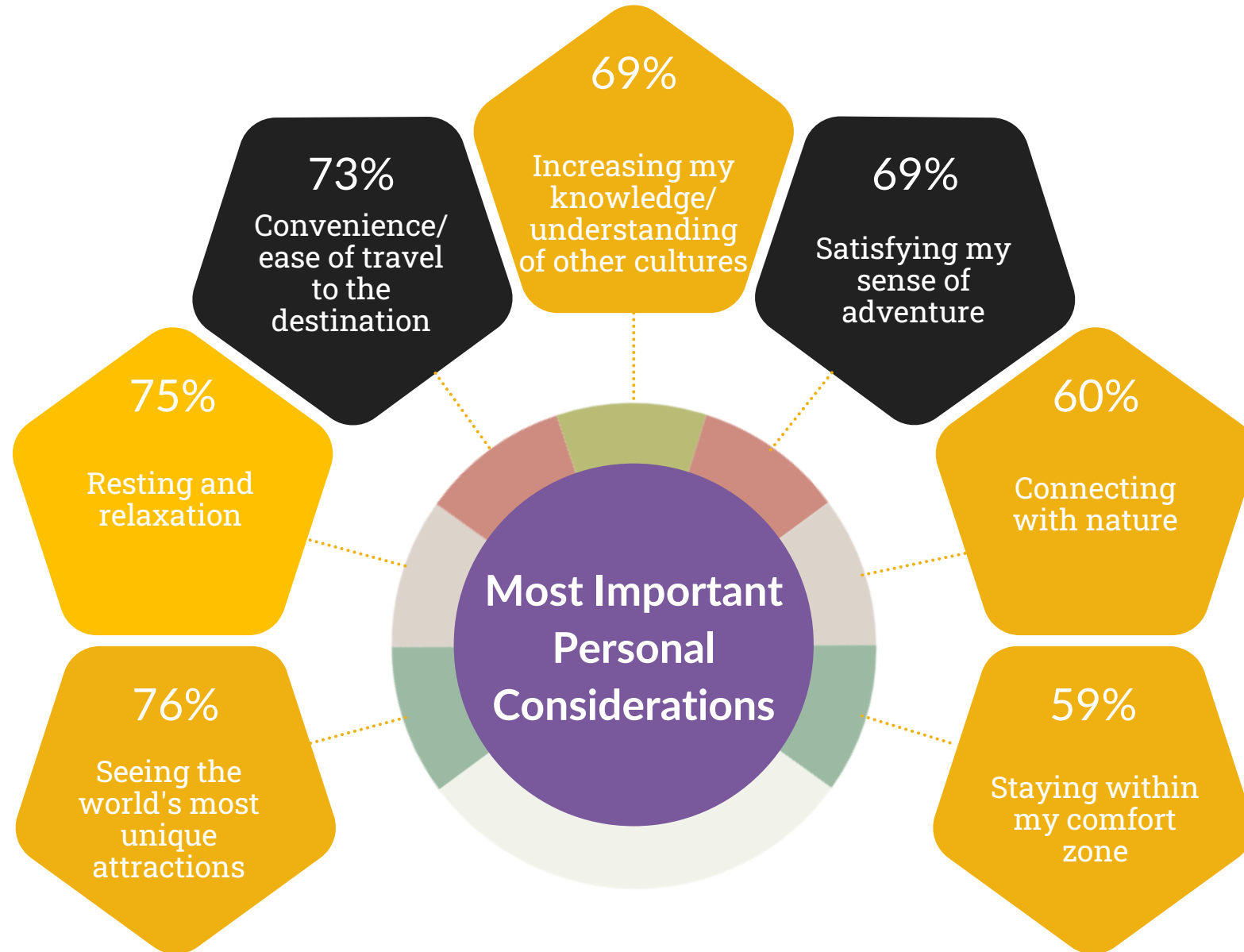
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15%

Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# CANADA



Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# CANADA

## Most Important When Choosing a Destination

- 58%** The price of the overall trip
- 51%** Ease of travel to destination
- 47%** Natural features/landscapes in the destination
- 46%** Activities available in the destination
- 46%** Variety of leisure attractions
- 45%** Cultural offerings at the destination
- 41%** Quality of beaches
- 33%** Reputation/popularity as a travel destination

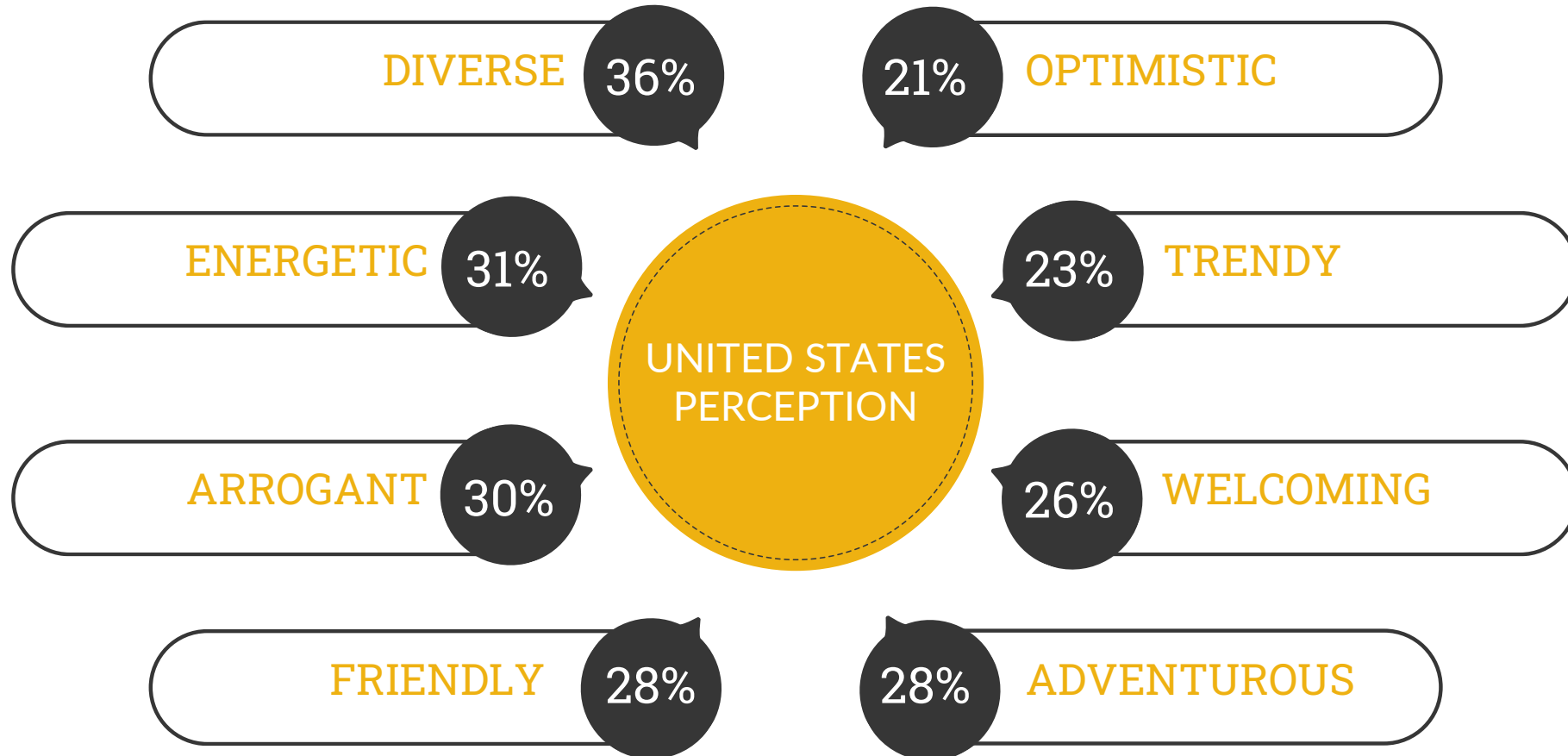
## Most Discouraging From Visiting a Destination

- 46%** Personal safety concerns
- 36%** Lack of information for me to plan my trip
- 35%** Cleanliness in the destination
- 33%** Crowdedness
- 30%** Inconvenience of travel to the destination
- 30%** Political climate not aligning with personal views
- 26%** Value for the money
- 25%** Visa requirements/entry procedures

Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

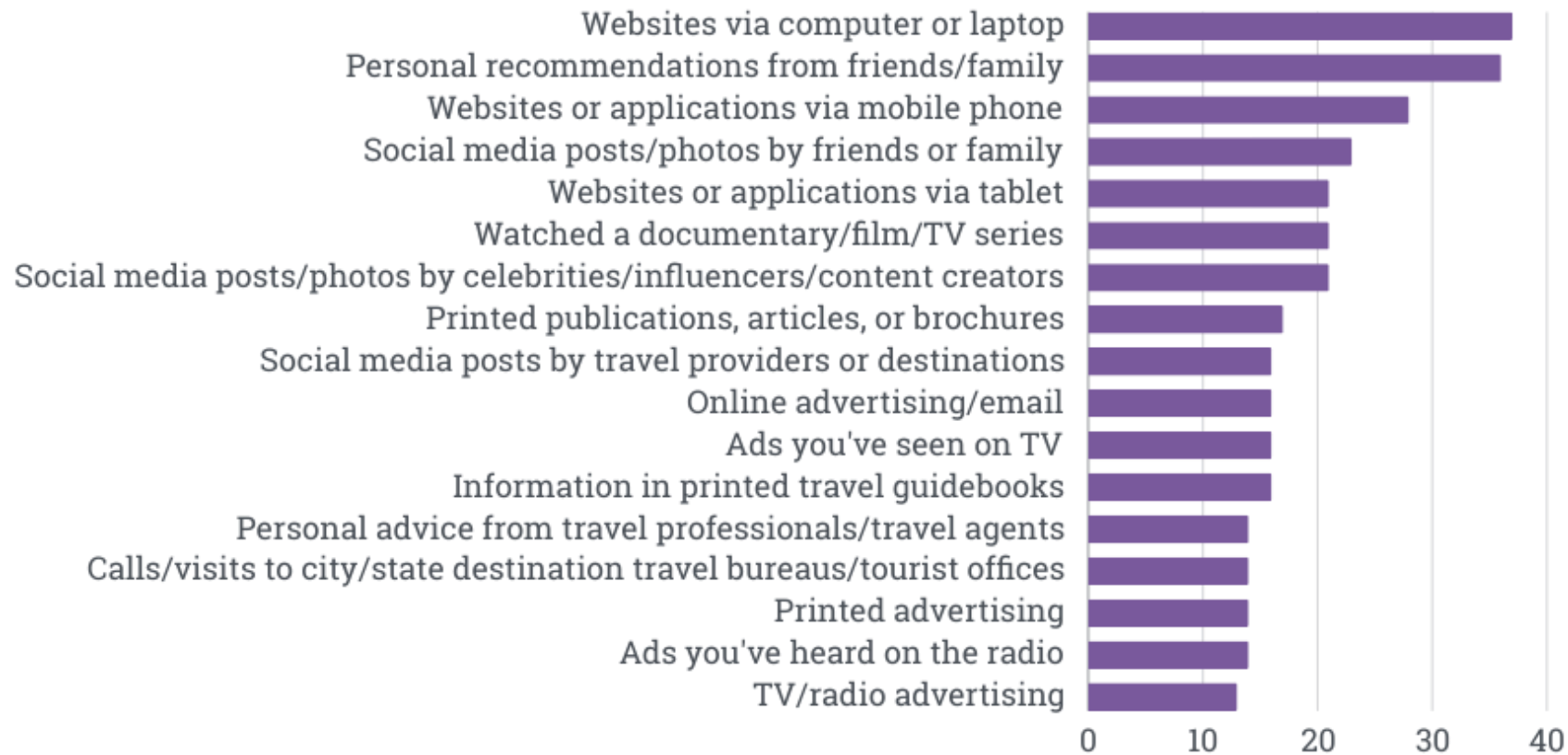
# CANADA



Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Sources of Information for Destination Selection



Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)



## Websites Used for Destination Selection



Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Social Media Participation

Facebook/META	66%
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Instagram	54%
Twitter	42%
TikTok	39%
LinkedIn	37%
Pinterest	29%
Reddit	26%
Snapchat	24%
Tumblr	10%

Note: Canadian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# CANADA

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## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

61%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it

58%

Global wars/strife will impact the destinations I visit in 2024

46%

Climate change will have a significant impact on my leisure travel in the next five years

44%

I'll be more proactive in reducing the impact of my travel on the environment

42%

With higher temperatures each year, travelers will try to seek out cooler places

# CANADA

---

## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

35%

Tipping etiquette in the U.S. confuses me

22%

Artificial Intelligence (AI) tools (like ChatGPT) will be commonly used by travelers to plan their trips

21%

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations

20%

I often bring work with me to do when I am on holiday

19%

Labor shortages will be a problem for the travel industry

# UNITED KINGDOM



POPULATION  
*2023*

REAL GDP  
GROWTH  
*2024 PROJECTION*

CURRENCY  
RATE  
*2023*

INFLATION  
RATE  
*2024 PROJECTION*

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
GOODS & SERVICES  
EXPORTS*

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
SERVICES  
EXPORTS*

68M

0.6%

0.80

3.7%

8.4%

15.4%

# UNITED KINGDOM

---

54%

Likelihood to Visit Travel South  
in the next Five Years



## Most Important Content For Destination Decisions:

- 37.3% Restaurants and food
- 36.6% Hotels and lodging
- 29.1% Safety
- 25.8% Transportation and how to get around
- 25.6% Availability of direct flight service
- 24.4% Historical attractions
- 23.9% Shopping
- 22.8% Sightseeing tours
- 22.1% National Parks
- 20.9% Important or iconic attractions
- 19.1% Beaches
- 18.9% Museums and culture
- 18.0% Entertainment, events, shows
- 17.6% Family fun
- 16.8% Opportunities for relaxation
- 16.3% Theme parks
- 16.0% Ways to experience nature
- 12.9% Ways to experience the American lifestyle
- 12.6% Things to do outside the large cities
- 11.4% Level of crowds
- 10.9% Off-the-beaten path attractions
- 10.6% Touristy attractions to avoid
- 9.9% Ideas for adventurous travel
- 9.0% Recommendations from local residents
- 8.6% Sample trip itineraries
- 8.4% Outdoor activities (biking, hiking, etc.)
- 5.8% Professional sporting events
- 5.5% Commitment to being eco-friendly
- 3.5% Snow/winter activities

# UNITED KINGDOM

---

Recall of “Buzz”: Travel South Destinations

20%

Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.



Note: United Kingdom visitors who are Likely to Travel Internationally

Source: Future Partners (2024)

# UNITED KINGDOM

---



## APPEAL

Destination Appeal of TRAVEL SOUTH as a place to visit on a vacation



## FAMILIARITY

Destination Familiarity with the attractions and things to see and do in TRAVEL SOUTH



# UNITED KINGDOM

---



1 Trip

---

21%

2 Trips

---

27%

3-4 Trips

---

29%

5+ Trips

---

23%

3.4

Average Number of International Trips

Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# UNITED KINGDOM

---

0.9

Average Number of Bleisure Trips  
% of Business Trips with a Leisure Extension

1+ Trip

---

33%

1 Trip

---

16%

2 Trips

---

8%

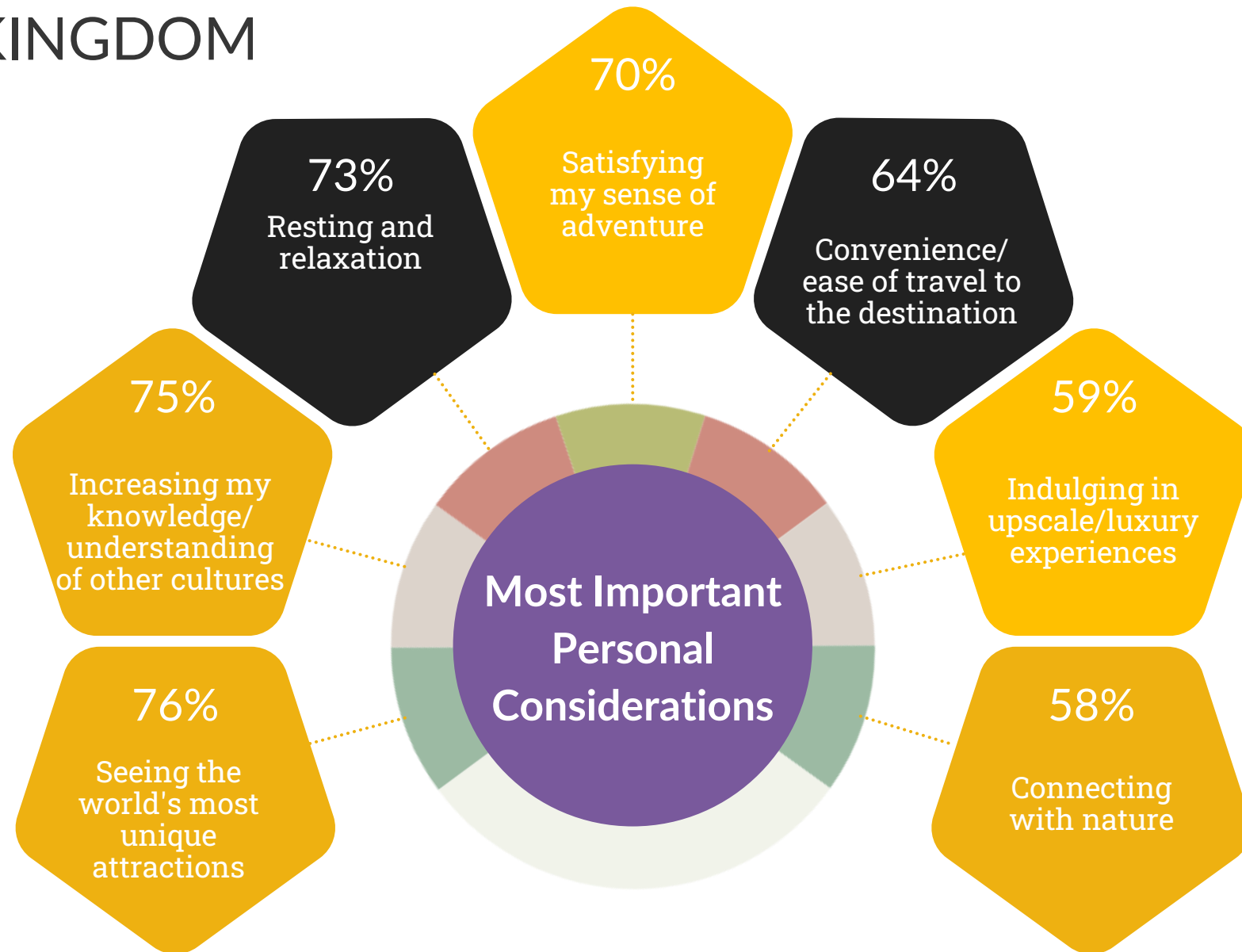
3+ Trips

---

9%



# UNITED KINGDOM



Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# UNITED KINGDOM

## Most Important When Choosing a Destination

- 58%** The price of the overall trip
- 45%** Ease of travel to destination
- 45%** Variety of leisure attractions
- 44%** Cultural offerings at the destination
- 41%** Natural features/landscapes in the destination
- 36%** Activities available in the destination
- 36%** Quality of beaches
- 36%** Opportunity to explore lesser-known destinations

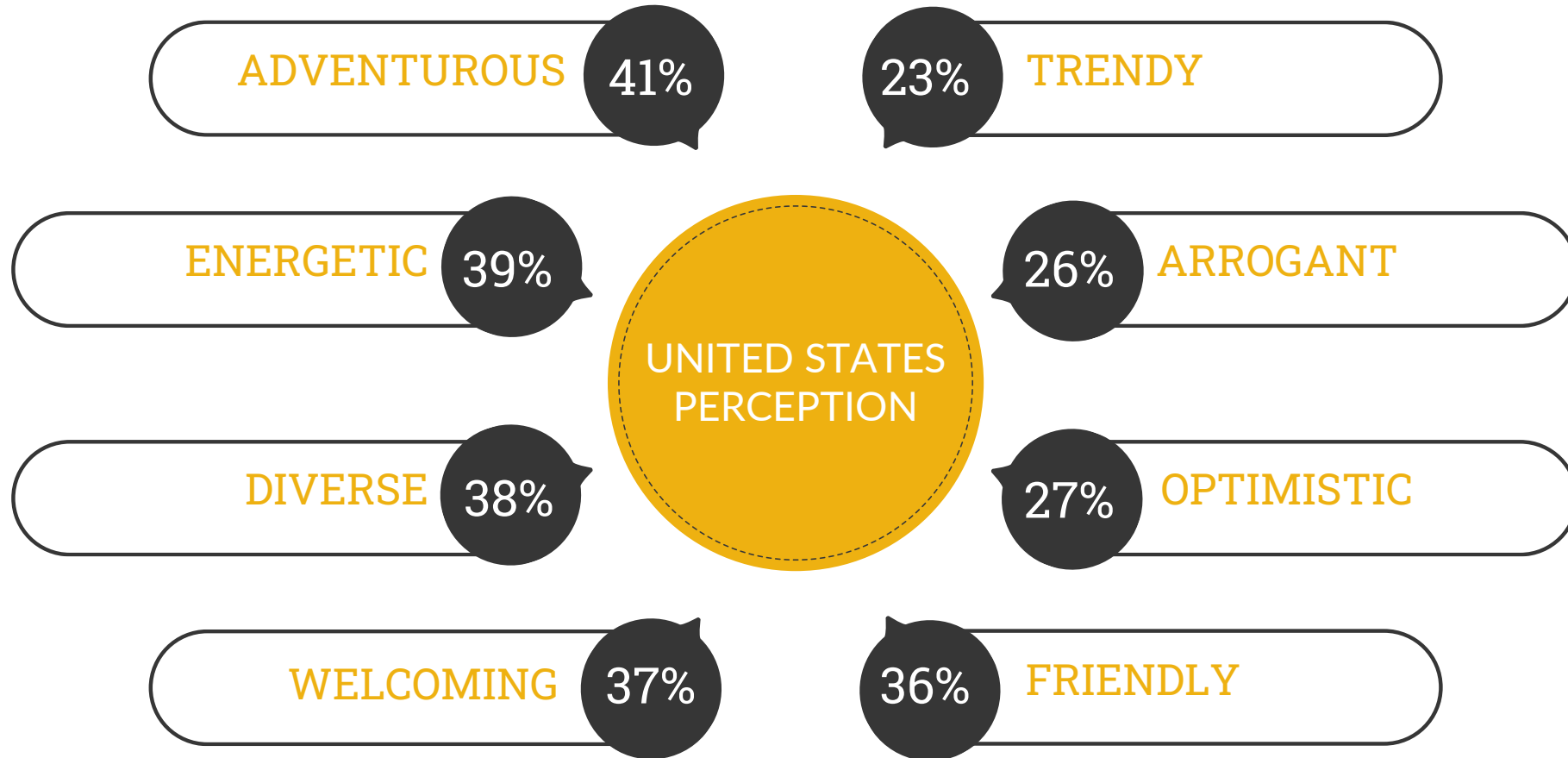
## Most Discouraging From Visiting a Destination

- 49%** Personal safety concerns
- 36%** Political climate not aligning with personal views
- 36%** Crowdedness
- 33%** Lack of information for me to plan my trip
- 31%** Inconvenience of travel to the destination
- 31%** Cleanliness in the destination
- 24%** Value for the money
- 23%** Visa requirements/entry procedures

Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

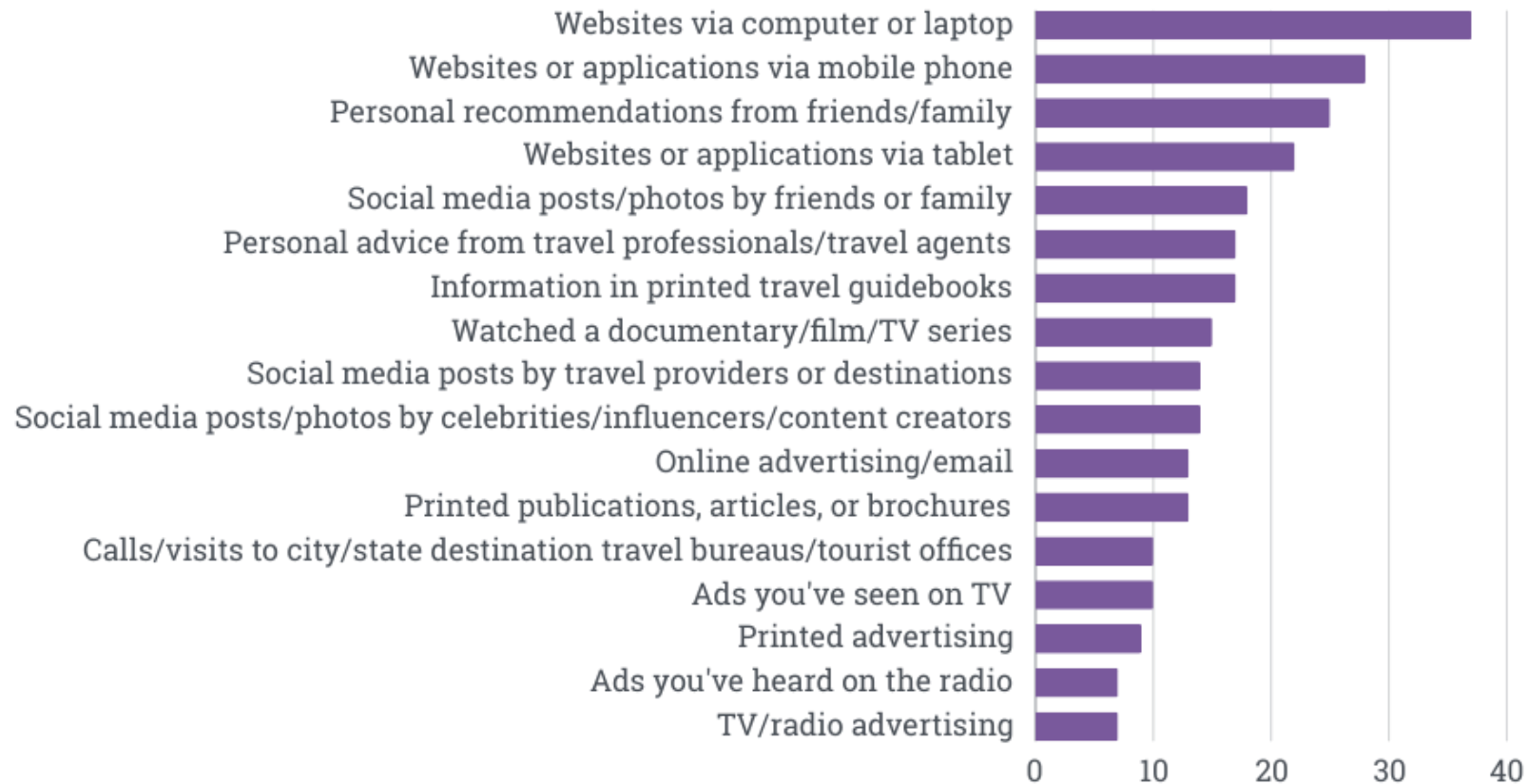
# UNITED KINGDOM



Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

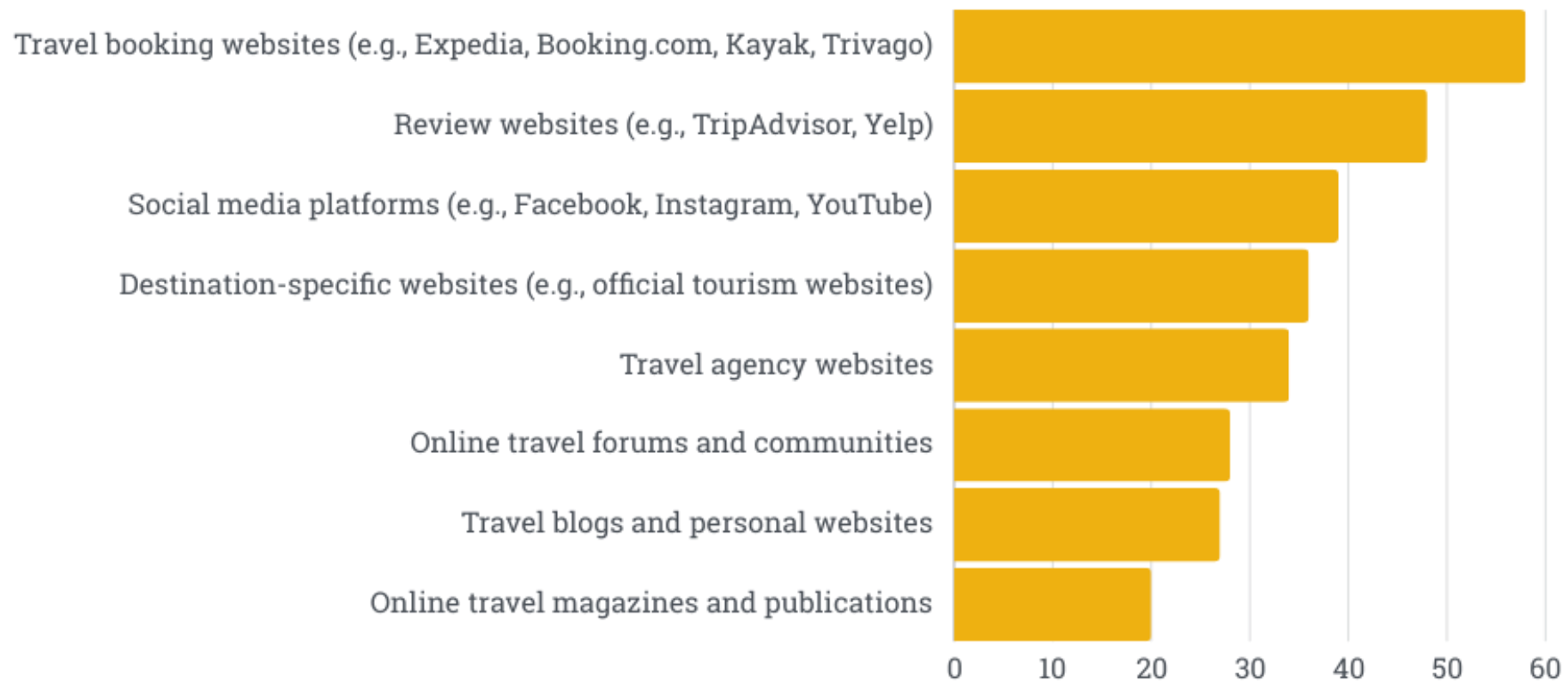
## Sources of Information for Destination Selection



Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Websites Used for Destination Selection



Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# UNITED KINGDOM

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## Social Media Participation

YouTube	61%
Instagram	60%
Facebook/META	58%
TikTok	46%
Twitter	43%
LinkedIn	36%
Snapchat	34%
Pinterest	25%
Reddit	14%
Tumblr	7%

Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)



# UNITED KINGDOM

---

## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

60%

Global wars/strife will impact the destinations I visit in 2024

57%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it

50%

With higher temperatures each year, travelers will try to seek out cooler places

50%

Tipping etiquette in the U.S. confuses me

49%

Climate change will have a significant impact on my leisure travel in the next five years

# UNITED KINGDOM

---

## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

46%

I'll be more proactive in reducing the impact of my travel on the environment

24%

Artificial Intelligence (AI) tools (like ChatGPT) will be commonly used by travelers to plan their trips

23%

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations

20%

I often bring work with me to do when I am on holiday

19%

Travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)

# GERMANY



POPULATION  
*2023*

REAL GDP  
GROWTH  
*2024 PROJECTION*

CURRENCY  
RATE  
*2023*

INFLATION  
RATE  
*2024 PROJECTION*

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
GOODS & SERVICES  
EXPORTS*

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
SERVICES  
EXPORTS*

84M

0.9%

0.92

3.5%

6.3%

17.9%

# GERMANY

---

52%

Likelihood to Visit Travel South  
in the next Five Years

## Most Important Content For Destination Decisions:



- 38.9% Hotels and lodging
- 35.5% National Parks
- 31.5% Important or iconic attractions
- 31.0% Historical attractions
- 29.6% Safety
- 25.4% Restaurants and food
- 24.8% Beaches
- 24.3% Ways to experience nature
- 23.0% Availability of direct flight service
- 17.8% Sightseeing tours
- 17.0% Transportation and how to get around
- 16.6% Shopping
- 16.5% Museums and culture
- 15.6% Family fun
- 15.5% Ways to experience the American lifestyle
- 15.5% Opportunities for relaxation
- 14.6% Things to do outside the large cities
- 14.5% Touristy attractions to avoid
- 13.9% Theme parks
- 10.9% Off-the-beaten path attractions
- 10.9% Outdoor activities (biking, hiking, etc.)
- 10.4% Entertainment, events, shows
- 10.3% Recommendations from local residents
- 8.9% Ideas for adventurous travel
- 6.9% Level of crowds
- 6.0% Professional sporting events
- 5.0% Snow/winter activities
- 4.8% Sample trip itineraries
- 4.8% Commitment to being eco-friendly

# GERMANY

---

Recall of “Buzz”: Travel South Destinations

21%

Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.



Note: German visitors who are Likely to Travel Internationally

Source: Future Partners (2024)

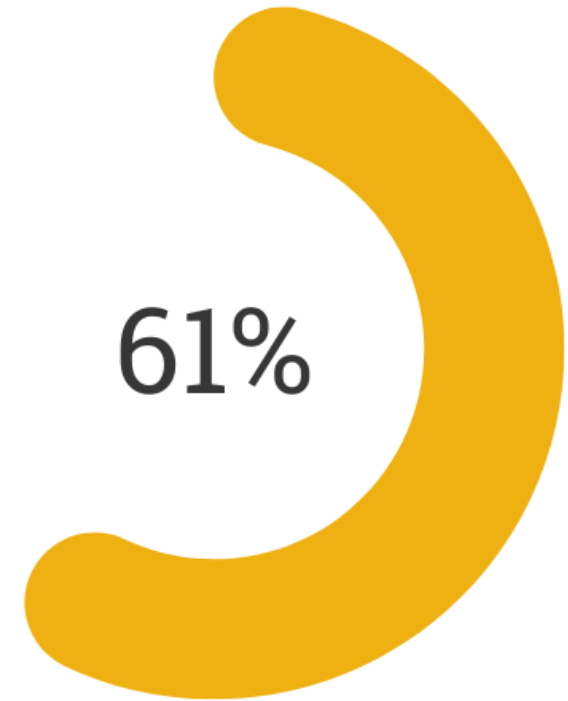
# GERMANY

---



## APPEAL

Destination Appeal of TRAVEL SOUTH as a place to visit on a vacation



## FAMILIARITY

Destination Familiarity with the attractions and things to see and do in TRAVEL SOUTH

# GERMANY

---



1 Trip

---

21%

2 Trips

---

22%

3-4 Trips

---

26%

5+ Trips

---

31%

4.4

Average Number of Leisure  
International Trips

Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# GERMANY

---



# 1.5

**Average Number of Bleisure Trips**  
% of Business Trips with a Leisure Extension

**1+ Trips**

---

42%

**1 Trip**

---

12%

**2 Trips**

---

10%

**3+ Trips**

---

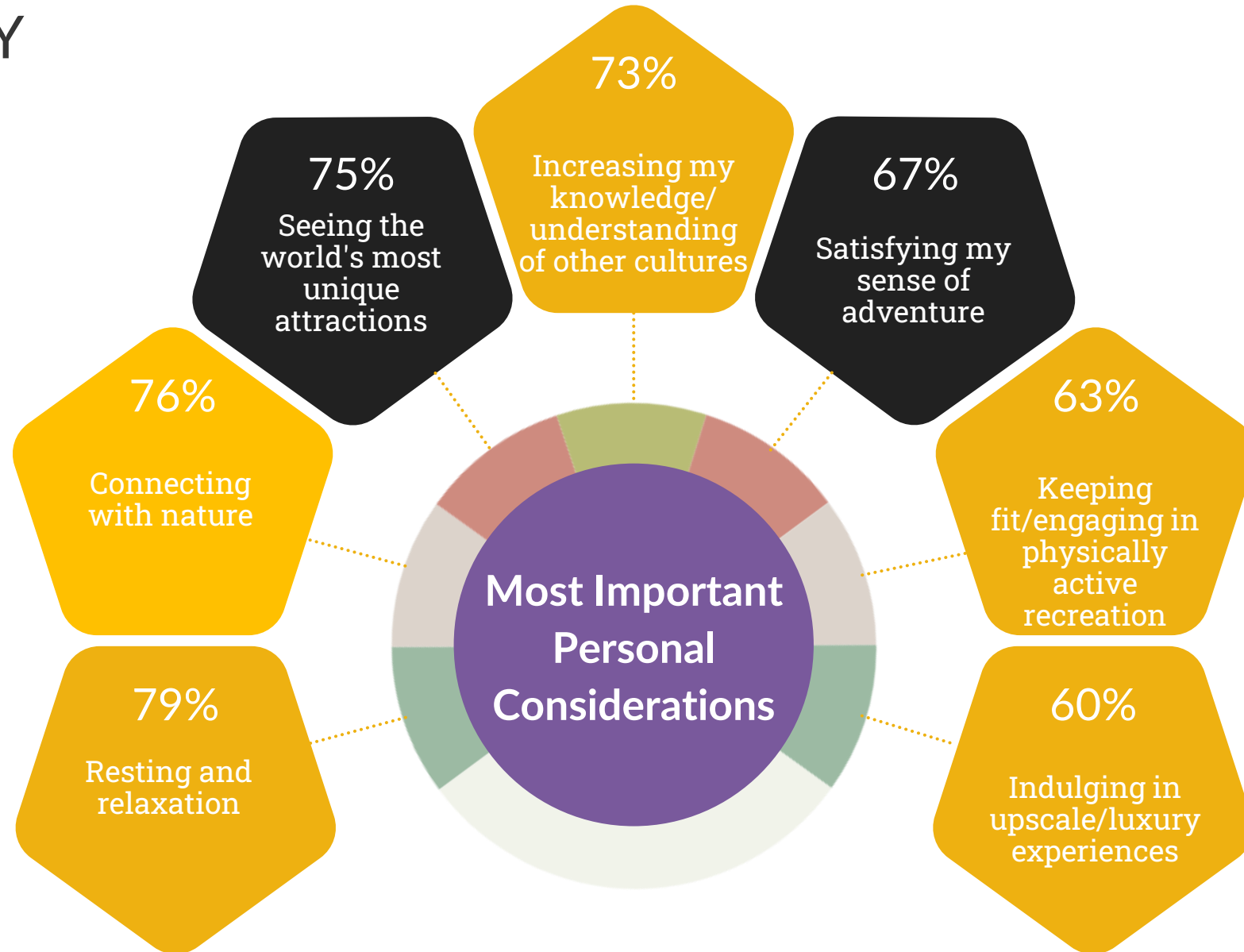
19%

Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)



# GERMANY



Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# GERMANY

## Most Important When Choosing a Destination

- 53%** The price of the overall trip
- 49%** Natural features/landscapes in the destination
- 47%** Quality of beaches
- 46%** Cultural offerings at the destination
- 40%** Ease of travel to destination
- 38%** Activities available in the destination
- 36%** Variety of leisure attractions
- 36%** Opportunity to explore lesser-known destinations

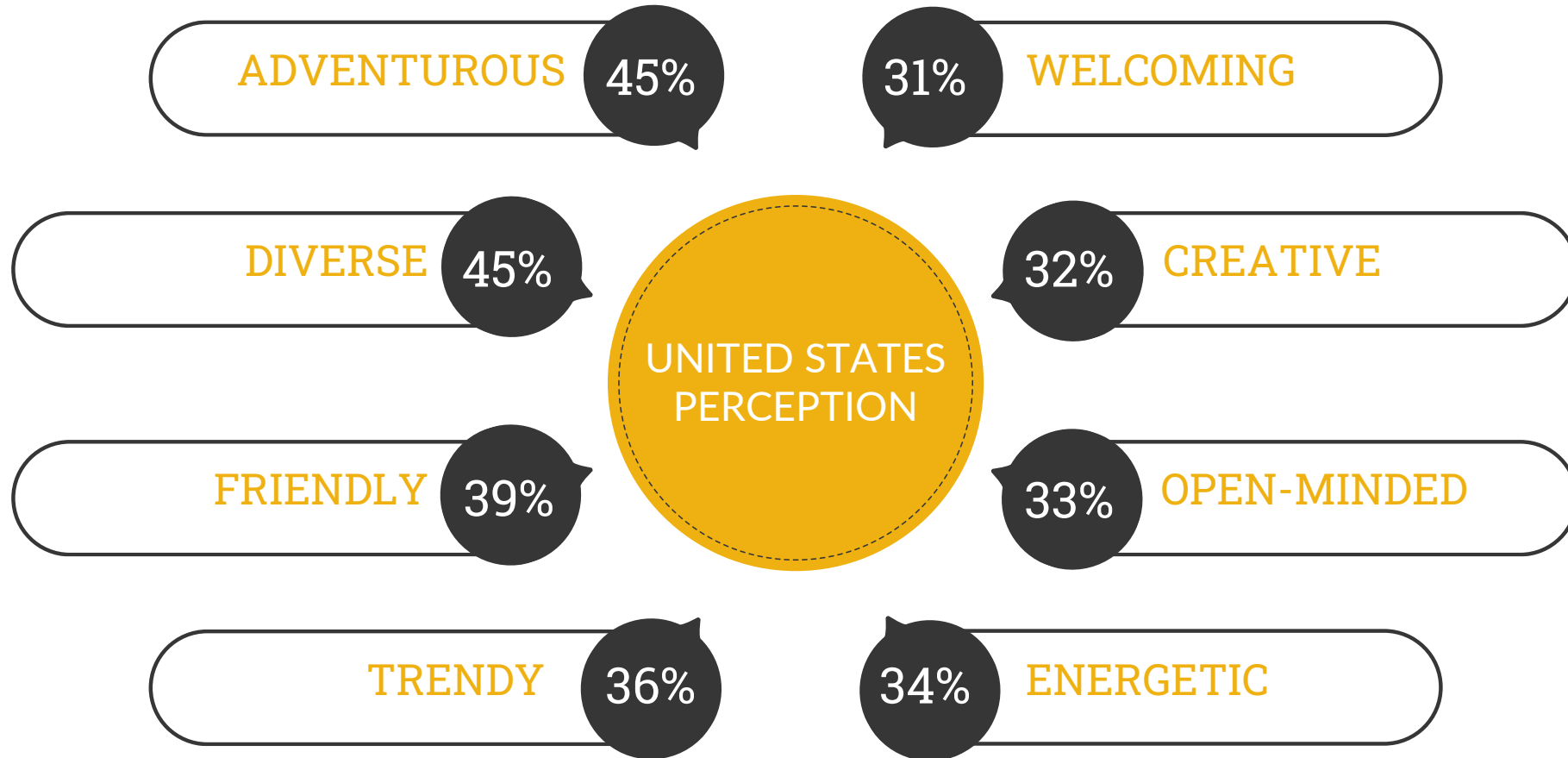
## Most Discouraging From Visiting a Destination

- 47%** Personal safety concerns
- 42%** Crowdedness
- 41%** Political climate not aligning with personal views
- 36%** Lack of information for me to plan my trip
- 36%** Cleanliness in the destination
- 27%** Value for the money
- 26%** Inconvenience of travel to the destination
- 25%** Unfamiliarity with local customs/language

Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

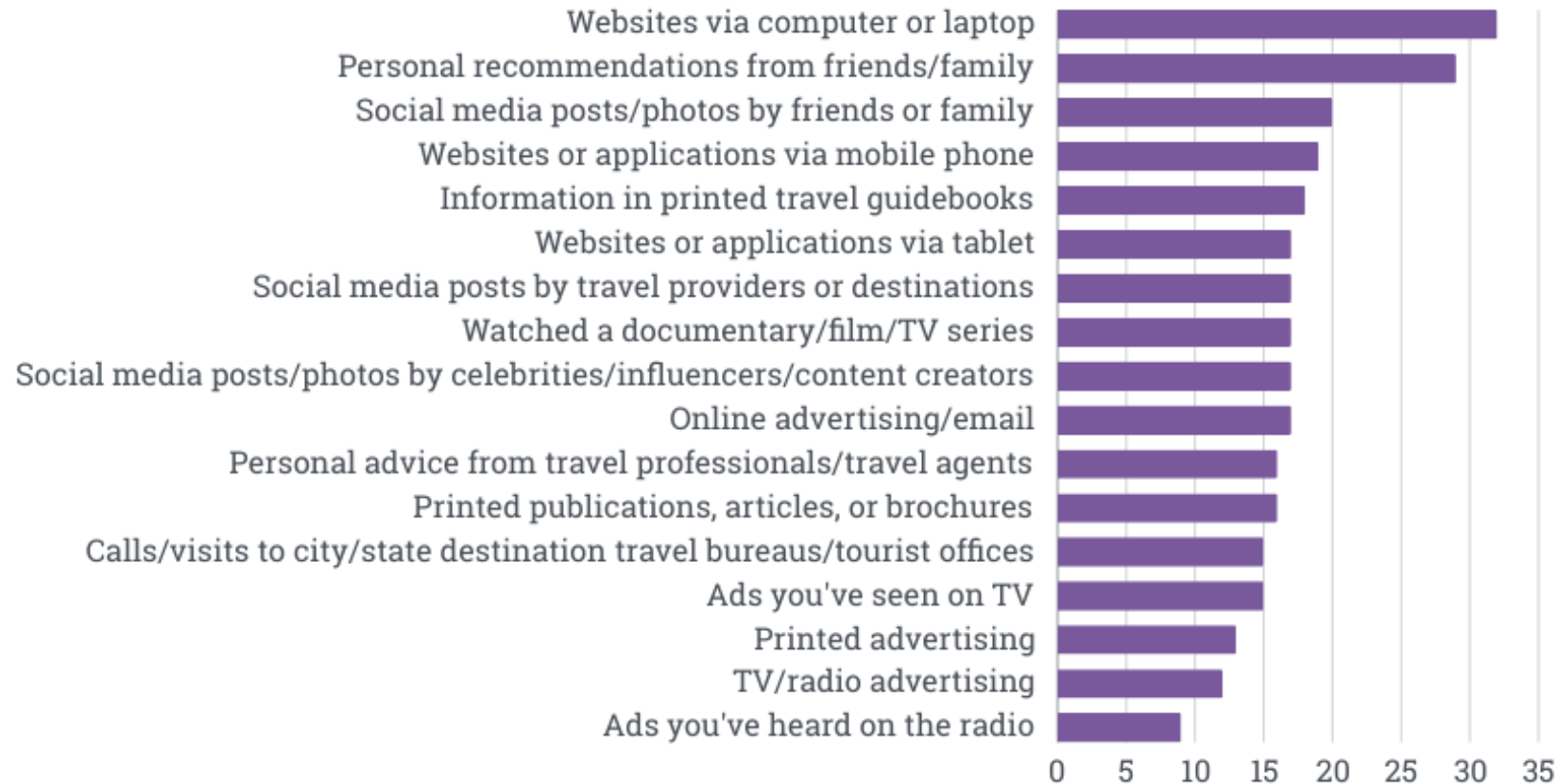
# GERMANY



Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

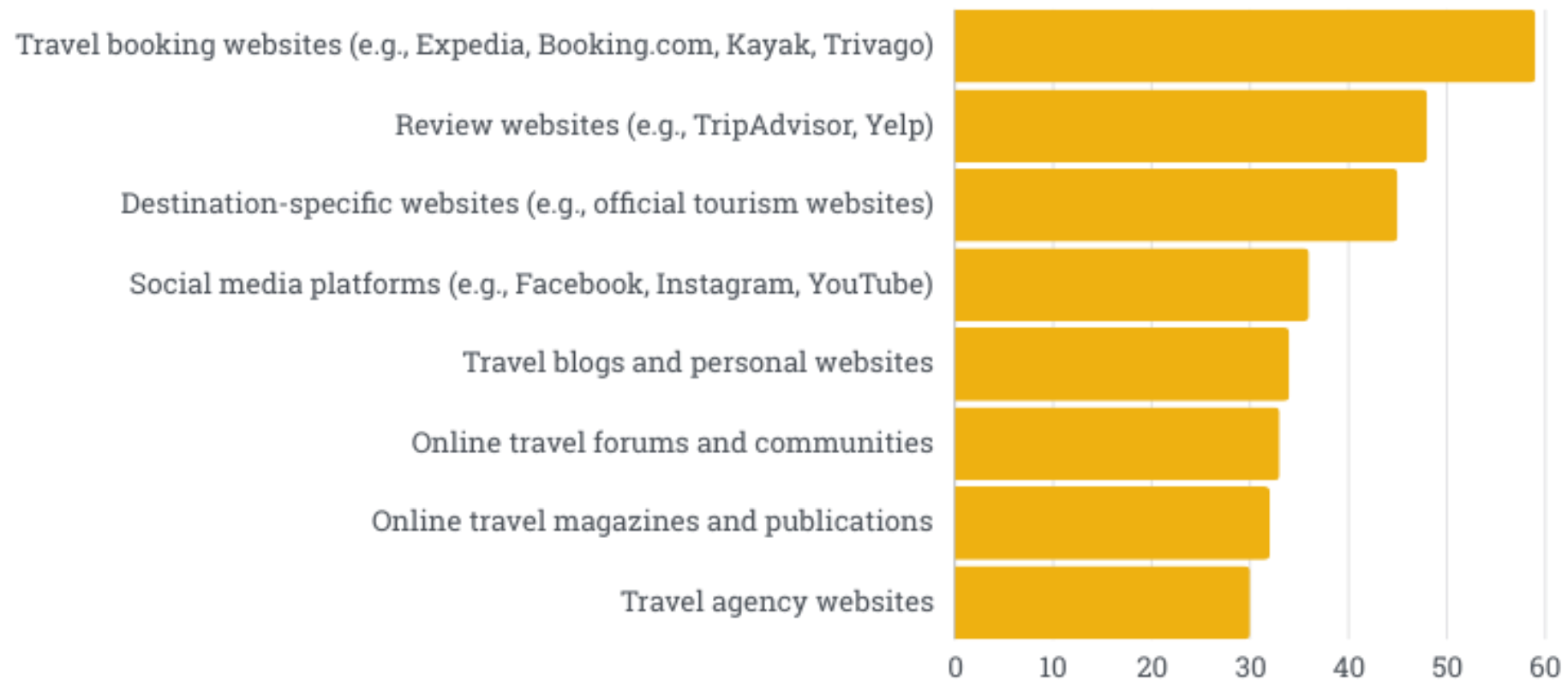
## Sources of Information for Destination Selection



Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Websites Used for Destination Selection



Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Social Media Participation

YouTube	73%
Instagram	66%
Facebook/META	56%
TikTok	46%
Twitter	35%
Pinterest	32%
Snapchat	32%
LinkedIn	27%
Xing	18%
Reddit	16%
Tumblr	8%

Note: German visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# GERMANY

---

## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

56%

Global wars/strife will impact the destinations I visit in 2024

54%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it

41%

With higher temperatures each year, travelers will try to seek out cooler places

39%

Climate change will have a significant impact on my leisure travel in the next five years

38%

I'll be more proactive in reducing the impact of my travel on the environment

# GERMANY

---

## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

38%

Tipping etiquette in the U.S. confuses me

23%

Labor shortages will be a problem for the travel industry

23%

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations

20%

Artificial Intelligence (AI) tools (like ChatGPT) will be commonly used by travelers to plan their trips

19%

Travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)



# MEXICO



POPULATION  
*2023*

131M

REAL GDP  
GROWTH  
*2024 PROJECTION*

2.1%

CURRENCY  
RATE  
*2023*

17.73

INFLATION  
RATE  
*2024 PROJECTION*

3.8%

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
GOODS & SERVICES  
EXPORTS*

5.8%

TRAVEL &  
TOURISM  
*as a share of  
2023 TOTAL U.S.  
SERVICES  
EXPORTS*

48.5%

# MEXICO

---

57%

Likelihood to Visit Travel South  
in the next Five Years

Note: Mexican visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:

- 40.6% Restaurants and food
- 39.3% Hotels and lodging
- 30.8% Shopping
- 29.9% Theme parks
- 25.3% Family fun
- 24.9% Beaches
- 23.5% Entertainment, events, shows
- 23.4% Sightseeing tours
- 23.3% Museums and culture
- 23.1% Safety
- 19.8% Historical attractions
- 18.4% National Parks
- 16.8% Important or iconic attractions
- 16.1% Availability of direct flight service
- 14.3% Transportation and how to get around
- 13.4% Ways to experience nature
- 12.4% Opportunities for relaxation
- 12.0% Off-the-beaten path attractions
- 10.6% Outdoor activities (biking, hiking, etc.)
- 10.5% Snow/winter activities
- 9.6% Things to do outside the large cities
- 9.6% Ideas for adventurous travel
- 8.9% Professional sporting events
- 8.3% Sample trip itineraries
- 8.1% Touristy attractions to avoid
- 7.8% Ways to experience the American lifestyle
- 7.5% Level of crowds
- 6.4% Commitment to being eco-friendly
- 5.9% Recommendations from local residents



Source: Future Partners (2024)

# MEXICO

---

Recall of “Buzz”: Travel South Destinations

41%

Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.

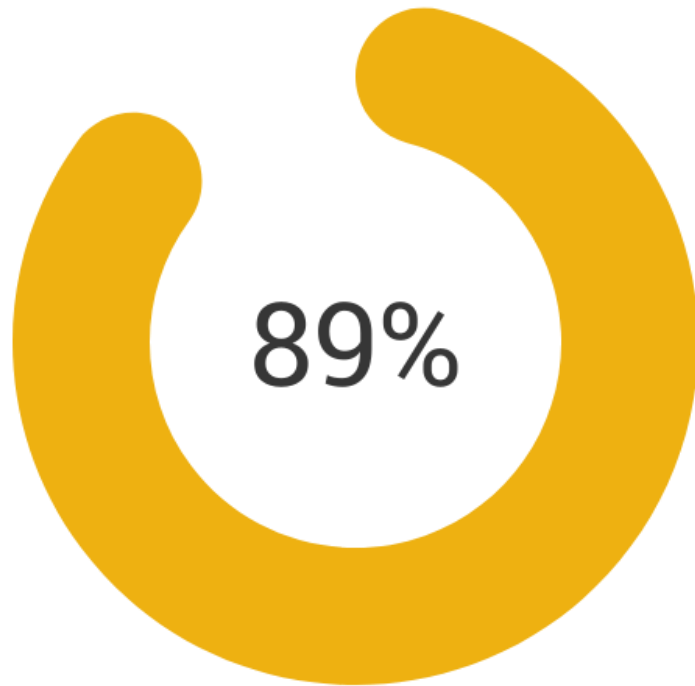


Note: Mexican visitors who are Likely to Travel Internationally

Source: Future Partners (2024)

# MEXICO

---



## APPEAL

Destination Appeal of TRAVEL SOUTH as a place to visit on a vacation



## FAMILIARITY

Destination Familiarity with the attractions and things to see and do in TRAVEL SOUTH

# MEXICO

---

3.8

## Average Number of Leisure International Trips

Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region



1 Trip

---

34%

2 Trips

---

27%

3-4 Trips

---

19%

5+ Trips

---

20%

Source: Brand USA (Aug. 2023)

# MEXICO

---

2.8

Average Number of Bleisure Trips  
% of Business Trips with a Leisure Extension

Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region



**1+ Trips**

---

66%

**1 Trip**

---

27%

**2 Trips**

---

18%

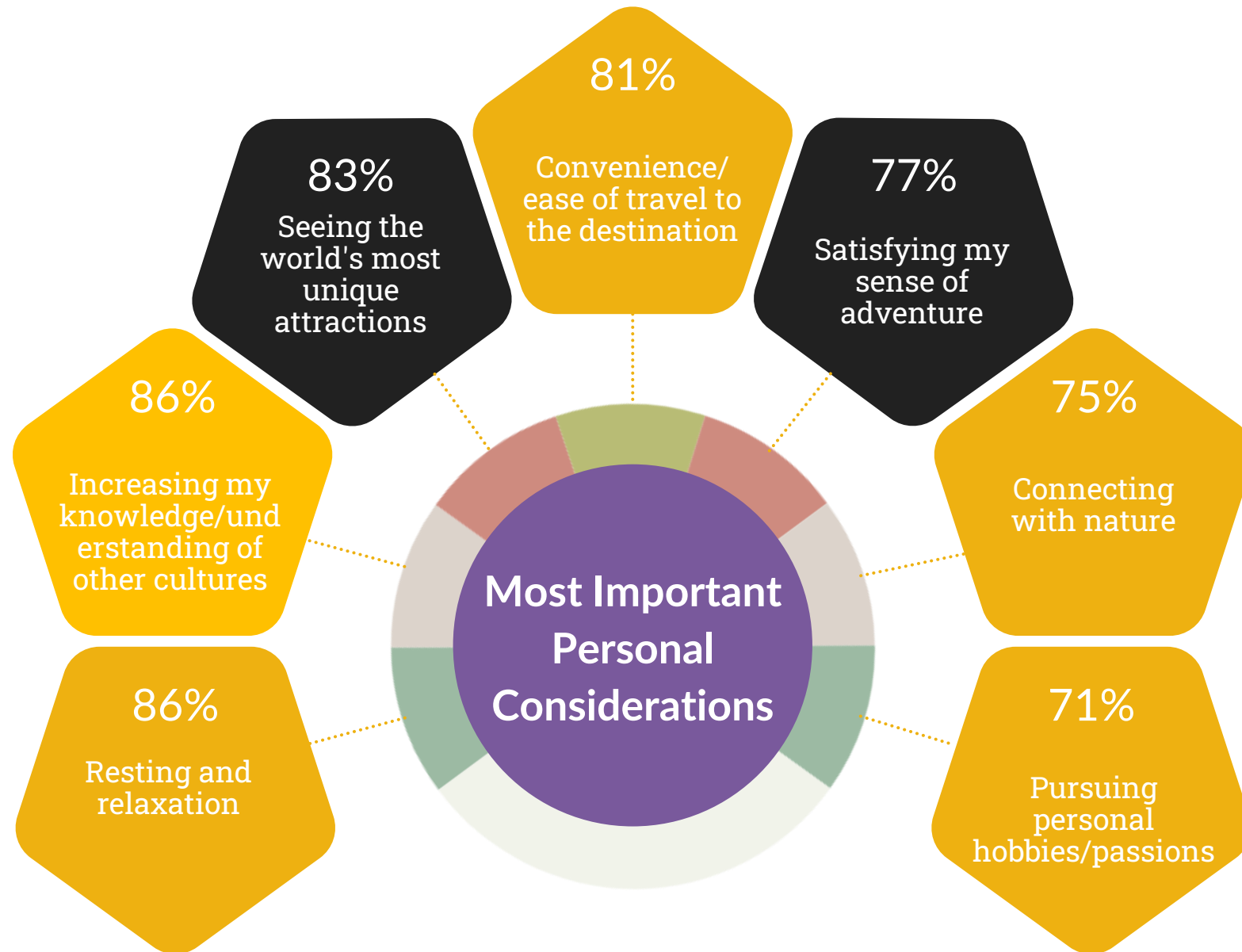
**3+ Trips**

---

22%

Source: Brand USA (Aug. 2023)

# MEXICO



Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# MEXICO

## Most Important When Choosing a Destination

- 59%** The price of the overall trip
- 57%** Cultural offerings at the destination
- 56%** Variety of leisure attractions
- 55%** Natural features/landscapes in the destination
- 49%** Ease of travel to destination
- 49%** Quality of beaches
- 46%** Activities available in the destination
- 43%** Opportunity to explore lesser-known destinations

## Most Discouraging From Visiting a Destination

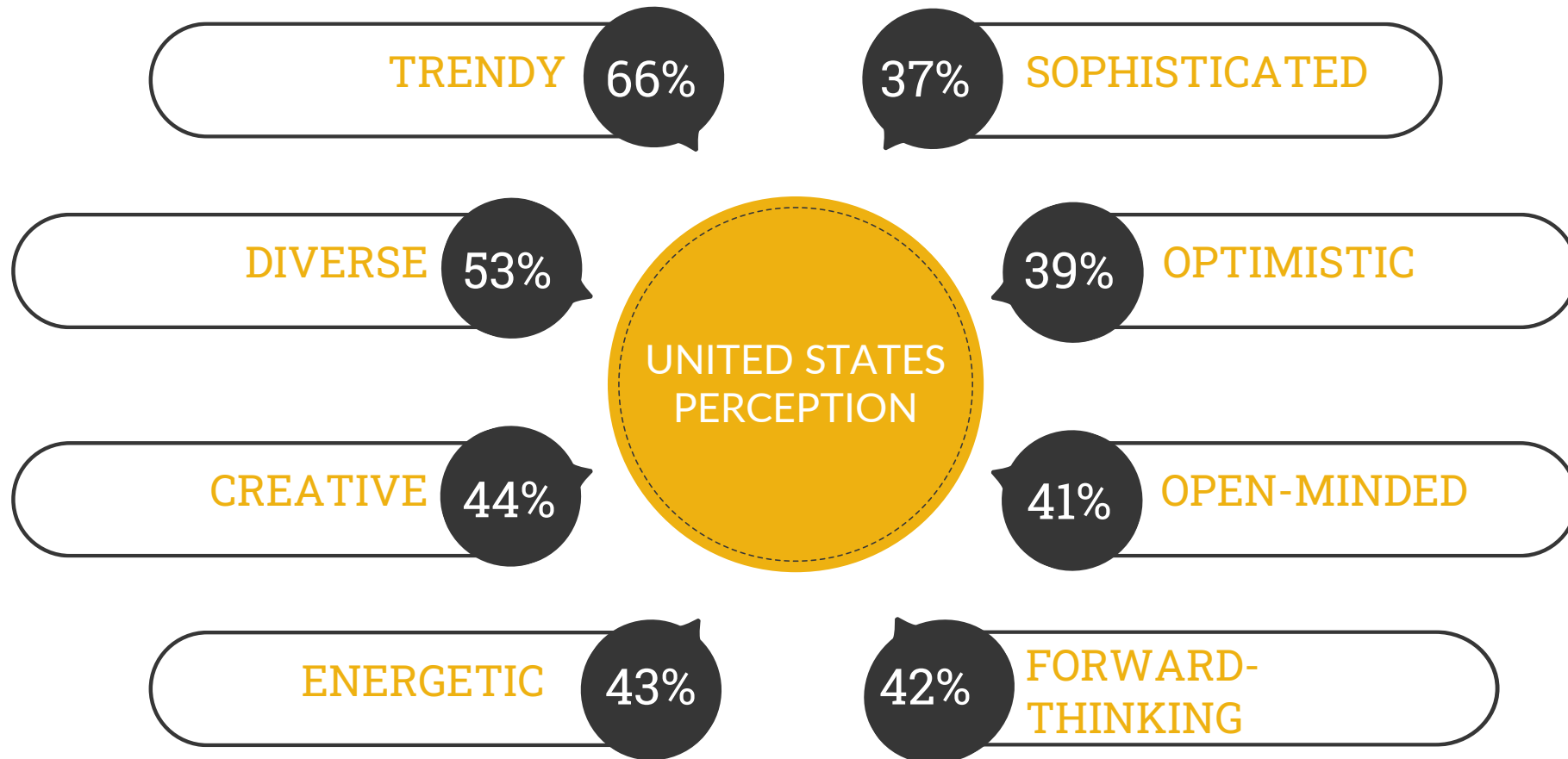
- 41%** Personal safety concerns
- 34%** Inconvenience of travel to the destination
- 31%** Lack of information for me to plan my trip
- 31%** Cleanliness in the destination
- 29%** Visa requirements/entry procedures
- 28%** Crowdedness
- 28%** Political climate not aligning with personal views
- 25%** Value for the money

Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)



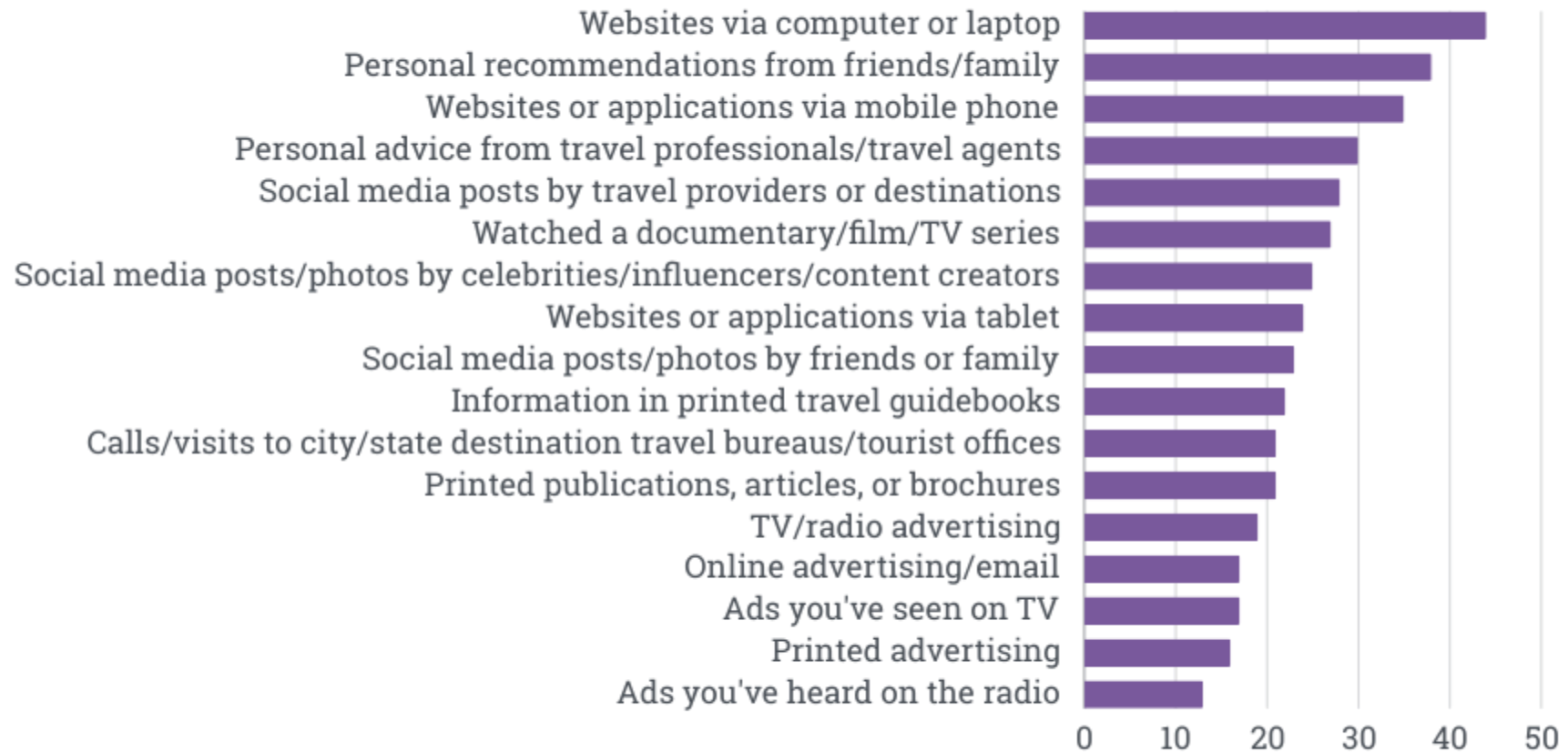
# MEXICO



Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

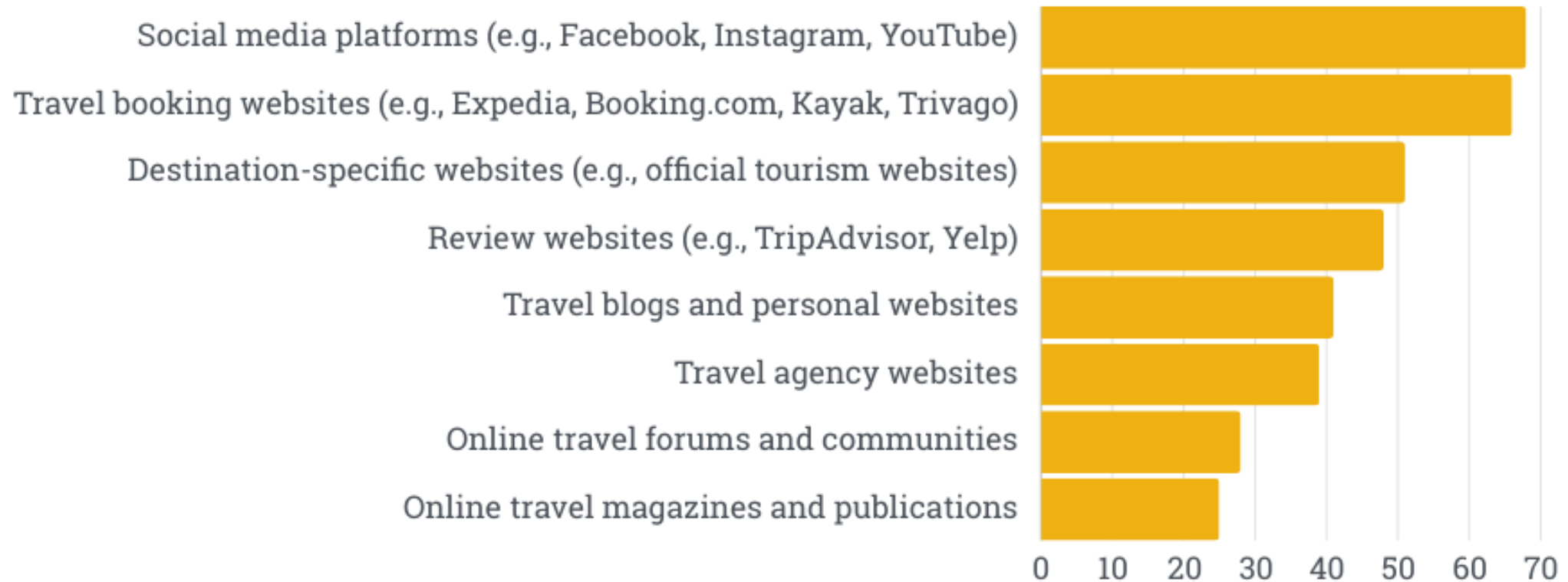
## Sources of Information for Destination Selection



Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Websites Used for Destination Selection



Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

## Social Media Participation

Instagram	85%
Facebook/META	85%
YouTube	82%
TikTok	71%
Twitter	65%
Pinterest	40%
LinkedIn	32%
Snapchat	30%
Reddit	22%
Tumblr	9%

Note: Mexican visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# MEXICO

---

## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

69%

With higher temperatures each year, travelers will try to seek out cooler places

69%

I'll be more proactive in reducing the impact of my travel on the environment

61%

Global wars/strife will impact the destinations I visit in 2024

60%

If a U.S. destination has a problem with over-tourism, I am less likely to visit it

58%

Climate change will have a significant impact on my leisure travel in the next five years

# MEXICO

---

## Likelihood of how 2024 will evolve:

Percentages show the total of "Certain" + "Extremely Likely"

39%

Tipping etiquette in the U.S. confuses me

38%

Artificial Intelligence (AI) tools (like ChatGPT) will be commonly used by travelers to plan their trips

35%

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of

31%

I often bring work with me to do when I am on holiday

28%

"Dupes" is a slang word for destinations that are affordable alternatives to historically more expensive places. In 2024, visiting dupes will grow in popularity

# Resources



# Market Profiles



Global Partner Program



## VISION - A THRIVING SOUTHERN USA THAT AUTHENTICALLY WELCOMES THE WORLD

**PURPOSE: GROW INTERNATIONAL VISITOR DEMAND TO DRIVE A RESILIENT VISITOR ECONOMY,  
THRIVING COMMUNITIES AND CULTURAL VIBRANCY ACROSS THE TRAVEL SOUTH**

### FOCUS AREAS

CONTINENTS	COUNTRIES	MARKETING INVESTMENTS	CONSUMER	TRADE	MANAGED MEDIA
EUROPE	United Kingdom/Ireland	Innovation Challenge + BUSA Programs + TSI/GW FAMS	X	X	X
	Germany/Austria/Switzerland	Innovation Challenge + BUSA Programs + TSI/GW FAMS	X	X	X
	Nordics	TSI/GW FAMS + GPP		X	X
	France	TSI/GW FAMS + GPP		X	X
	Netherlands /Belgium	TSI/GW FAMS + GPP		X	X
	Italy	TSI/GW FAMS + GPP		X	X
	Spain	Monitoring			
NORTH AMERICA	Canada	Innovation Challenge + BUSA Programs + TSI/GW FAMS + GPP	X	X	X
	Mexico	Innovation Challenge + BUSA Programs		X	
SOUTH AMERICA	Brazil	TSI/GW FAMS + GPP		X	X
AUSTRALIA/OCEANIA	Australia/New Zealand	Innovation Challenge + BUSA Programs + TSI/GW FAMS + GPP	X	X	X
ASIA	China	TSI/GW FAMS + GPP		X	
	India	TSI/GW FAMS		X	
	South Korea	TSI/GW FAMS		X	
	Japan	TSI/GW FAMS + GPP		X	
	Taiwan	Monitoring			

GPP – Global Partner Programming – Shared services model of country managers.

Innovation Challenge – Annual co-op offers vetted and available for buy-ins from states and city DMOs

BUSA Programs – BUSA custom programming offers of digital marketing, global media partnerships, in-market consumer activations and new strategies

TSI & FAMS – Travel South International Showcase – Tour Operator Appointment show and FAMS

GWMM & FAMS – Global Week Media Marketplace – Journalist Appointment show and FAMS