

TRAVEL · SOUTH  USA

VIRGINIA

VIRGINIA  
IS FOR  
LOVERS®

**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

# Virginia's International Visitor Economy

## *Highlighting the State's Global Interconnectivity*



### Significant Recovery

- Witnessed a significant recovery in 2023
- Spending reached **\$1.2 billion** and **858,000** visitors
- By 2025, forecasted to reach **\$1.7 billion** and **1.1 million** visitors

### US Inbound Travel Rebound

- Virginia's spending index is poised to hit **104 out of 100** (based on the 2019 to 2026 projected)
- Fueled by visitors from **Canada, United Kingdom/Ireland, India, DACH Region, Turkey, Nordics, United Arab Emirates, China, Israel and Italy**, accounting for **57%** of the state's international tourism expenditures

### Economy Boosted by Exports in Goods

- **5,000** companies exported **\$22.4 billion** worth of goods
- Exports to **Canada, China, India, the Netherlands, and Germany** are among the top origin markets of visitation
- **India and China** account for half of the international student population
- **87%** of visits are non-business related

# Virginia's International Visitor Economy

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

- Virginia's 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 Virginia's strategic advantage.
- The Washington-Dulles Airport connects the Commonwealth to 59 international destinations with easy access to the state.
- Proximity to neighboring states— Kentucky, Maryland, North Carolina, Tennessee, and West Virginia —attracts international travelers interested in the Travel South's natural beauty, cultural heritage, and connectivity, thus enriching Virginia's tourism landscape.

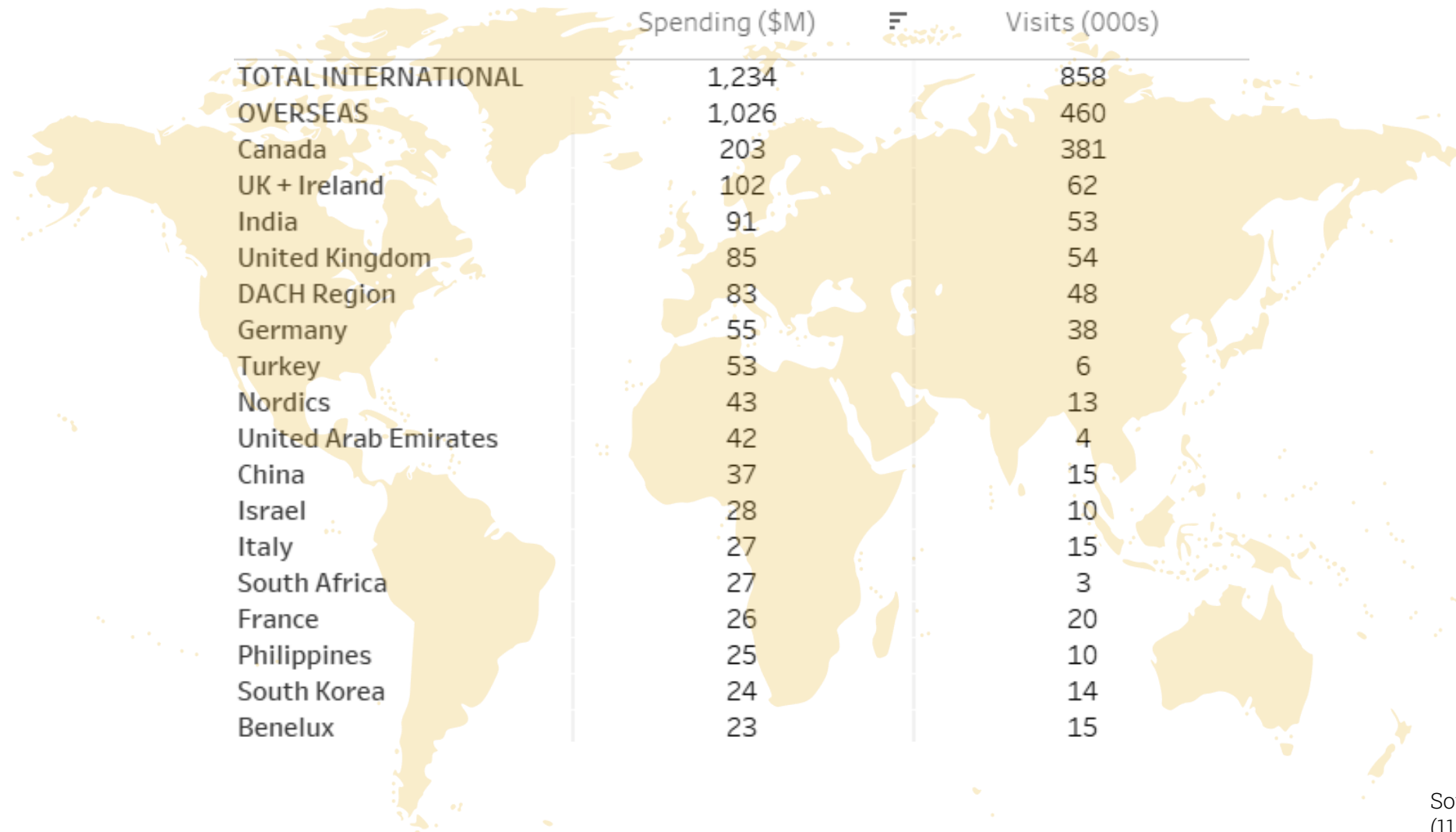


# Visitor Economy



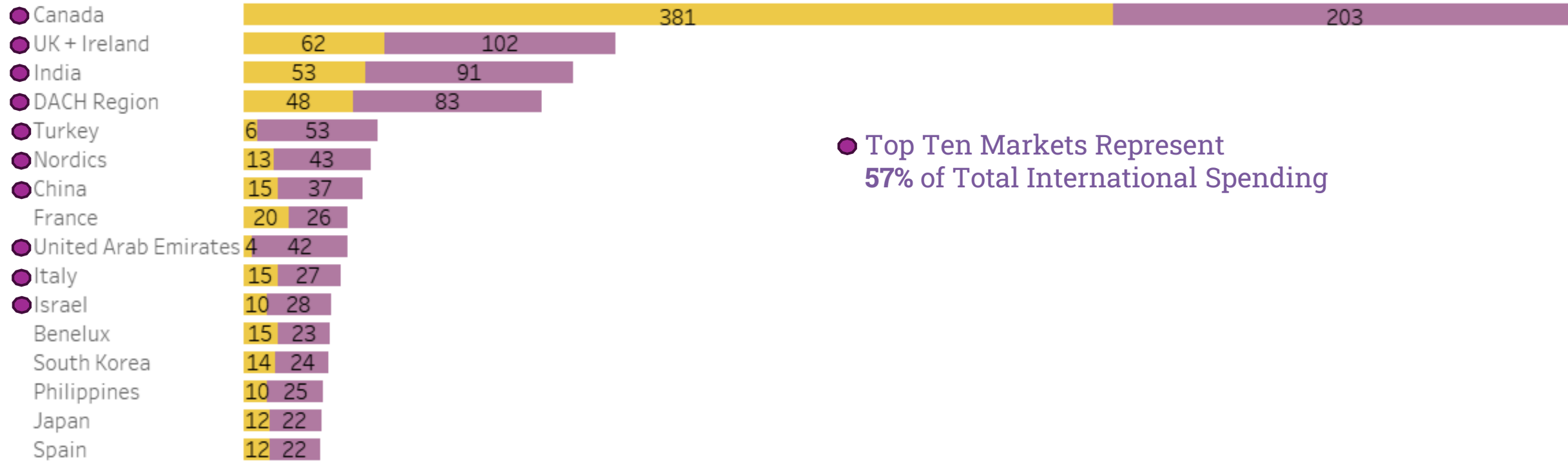
## 2023 INTERNATIONAL TRAVEL TO VIRGINIA

**\$1.2B** in Spending & **858,000** Visits



# VIRGINIA

## 2023 Top Visits + Spending by Market



● Top Ten Markets Represent 57% of Total International Spending

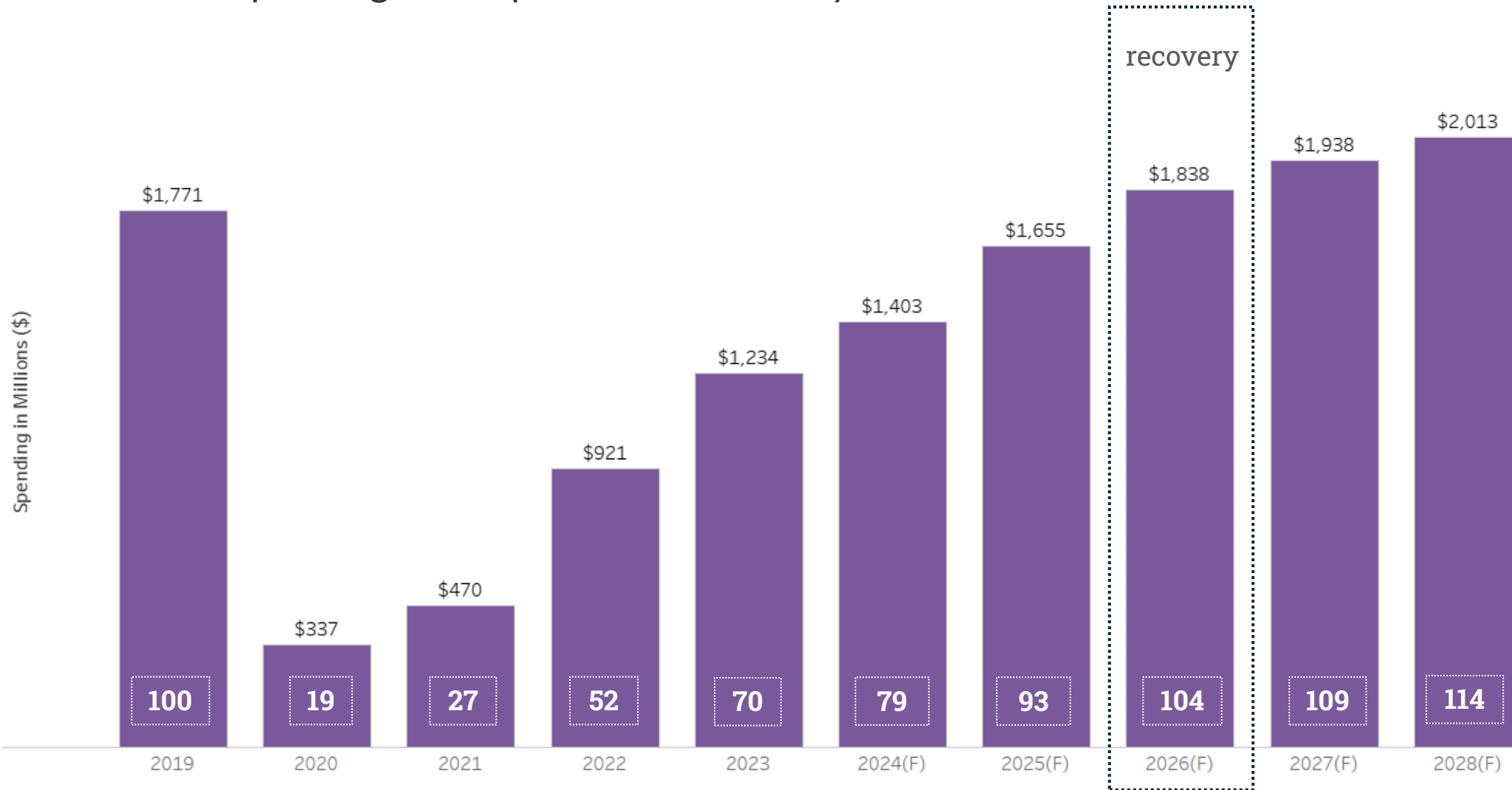
■ Spending (\$M)  
■ Visits (000s)



# VIRGINIA



## Visitor Spending & Pre-pandemic Recovery

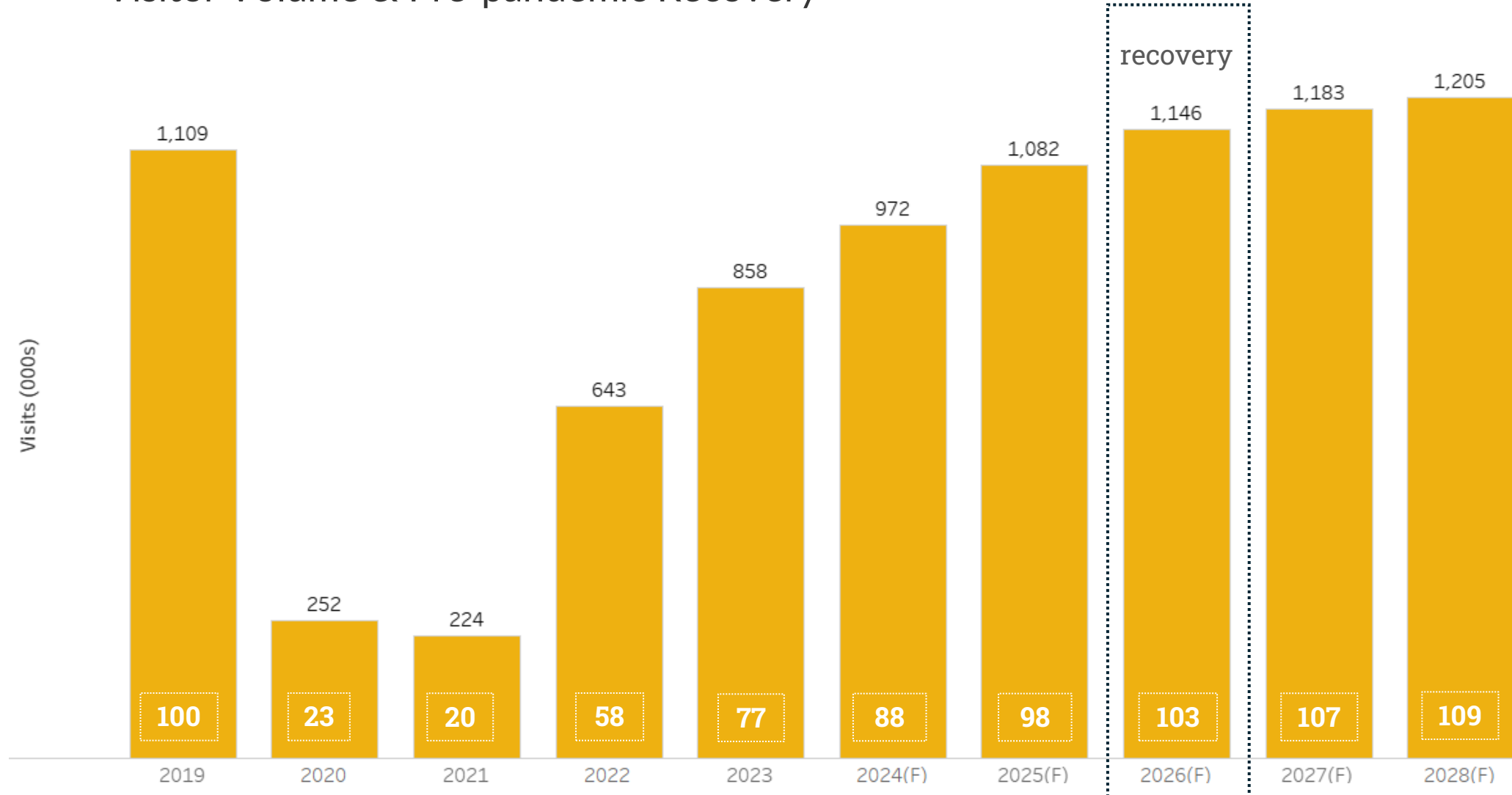


The 2019 data, standardized with the base year set to 100 (2019=100), ensures uniform comparability across visitor spending by providing a consistent reference point to the pre-pandemic period.

Note: (F)=Forecast

# VIRGINIA

## 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

# VIRGINIA

## \$1.4B Projected Spending in 2024

- Tourism Economics estimates international travel to reach **\$1.4 billion** and **972,000** visits in **2024**
- When comparing spending by market - **Canada, United Kingdom/Ireland, India, DACH Region, and China** are forecasted to be amongst the top five, with **Canada, India and DACH Region** leading in recovery

	Spending (\$M)	Spending Recovery Index (2019=100)	Visits (000s)
TOTAL INTERNATIONAL OVERSEAS	1,403	79	972
OVERSEAS	1,175	75	537
Canada	222	111	414
UK + Ireland	107	67	69
India	106	126	62
United Kingdom	91	64	61
DACH Region	85	101	50
China	76	66	28
Germany	57	123	40
Turkey	57	188	6
Nordics	46	54	15
Japan	38	80	20
United Arab Emirates	37	73	3
Philippines	32	92	12
South Africa	30	90	3
Italy	29	130	17
South Korea	28	92	16
France	28	93	21
Israel	26	41	10

# VIRGINIA



## \$1.7B Projected Spending in 2025

- Tourism Economics estimates international travel to reach **\$1.7 billion** and **1.1 million** visits in **2025**
- When comparing spending by market - **Canada, United Kingdom/Ireland, India, China and DACH Region** are forecasted to be amongst the top five, with **Canada, India and DACH Region** leading in recovery

	Spending (\$M)	Spending Recovery Index (2019=100)	Visits (000s)
TOTAL INTERNATIONAL OVERSEAS	1,655	93	1,082
	1,390	89	610
Canada	257	129	448
UK + Ireland	127	79	78
India	120	143	67
United Kingdom	108	76	69
China	100	86	37
DACH Region	100	117	57
Germany	68	145	45
Turkey	57	190	6
Nordics	57	67	18
Japan	50	103	26
United Arab Emirates	42	82	4
Philippines	39	114	14
South Korea	35	112	19
Israel	34	54	13
South Africa	34	101	4
France	33	110	23
Italy	33	146	19

Source: Tourism Economics (11.06.2024)

# VIRGINIA



## Visitor Spending Recovery Growth

	2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending Recovery Index (2019=100)							
Australia	100	15	5	57	86	97	124
Austria	100	14	18	46	49	45	51
Belgium	100	14	15	59	77	84	99
Benelux	100	13	17	65	80	91	110
Brazil	100	18	21	56	73	89	110
Canada	100	21	10	63	102	111	129
China	100	25	22	14	32	66	86
DACH Region	100	12	13	76	98	101	117
Denmark	100	14	12	53	53	49	60
Finland	100	18	7	67	69	89	110
France	100	13	19	54	87	93	110
Germany	100	12	12	89	118	123	145
India	100	23	28	99	109	126	143
Ireland	100	13	9	62	92	90	104
Italy	100	12	20	86	120	130	146
Japan	100	17	8	19	46	80	103
Mexico	100	32	42	60	63	78	98
Netherlands	100	13	18	69	82	95	117
Nordics	100	15	11	49	50	54	67
Norway	100	14	10	39	44	42	53
OVERSEAS	100	19	29	51	66	75	89
South Korea	100	25	43	46	76	92	112
Spain	100	13	22	100	114	133	154
Sweden	100	17	13	33	35	40	52
Switzerland	100	11	13	74	98	105	120
TOTAL INTERNATIONAL	100	19	27	52	70	79	93
Turkey	100	23	30	51	175	188	190
UK + Ireland	100	13	9	59	63	67	79
United Kingdom	100	13	10	58	60	64	76

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.

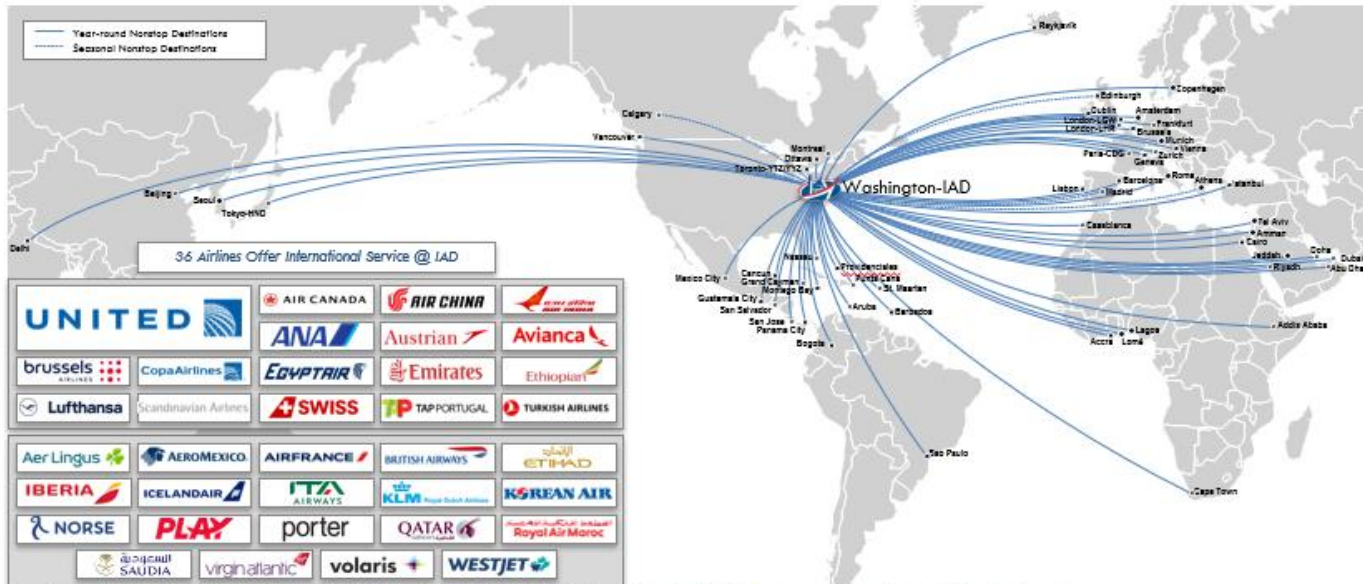
Note: (F)=Forecast

Source: Tourism Economics (11.06.2024)

# Flights

## Washington-Dulles offers nonstop flights to 59 Countries

### Non-Stop Flights to Key Markets



Source: Innovata Airline Schedules (November 2023 – October 2024), via DIO MI Online Portal as of November 13, 2023, and communication with airline planning departments  
Source: <https://www.flydulles.com/nonstop-destinations>

- Calgary, Montreal, Ottawa, Toronto, Vancouver
- Beijing
- Dublin, Edinburgh London
- Delhi
- Frankfurt, Munich, Vienna, Geneva, Zurich
- Copenhagen, Reykjavik
- Seoul
- Sao Paulo
- Tel Aviv
- Tokyo
- Brussels
- Barcelona, Madrid
- Lisbon
- Paris
- Rome



# Exports (Goods)



**EXPORTS IN GOODS**  
*2023*

**\$22.4 Billion**

**TOP COUNTRIES**

CANADA

CHINA

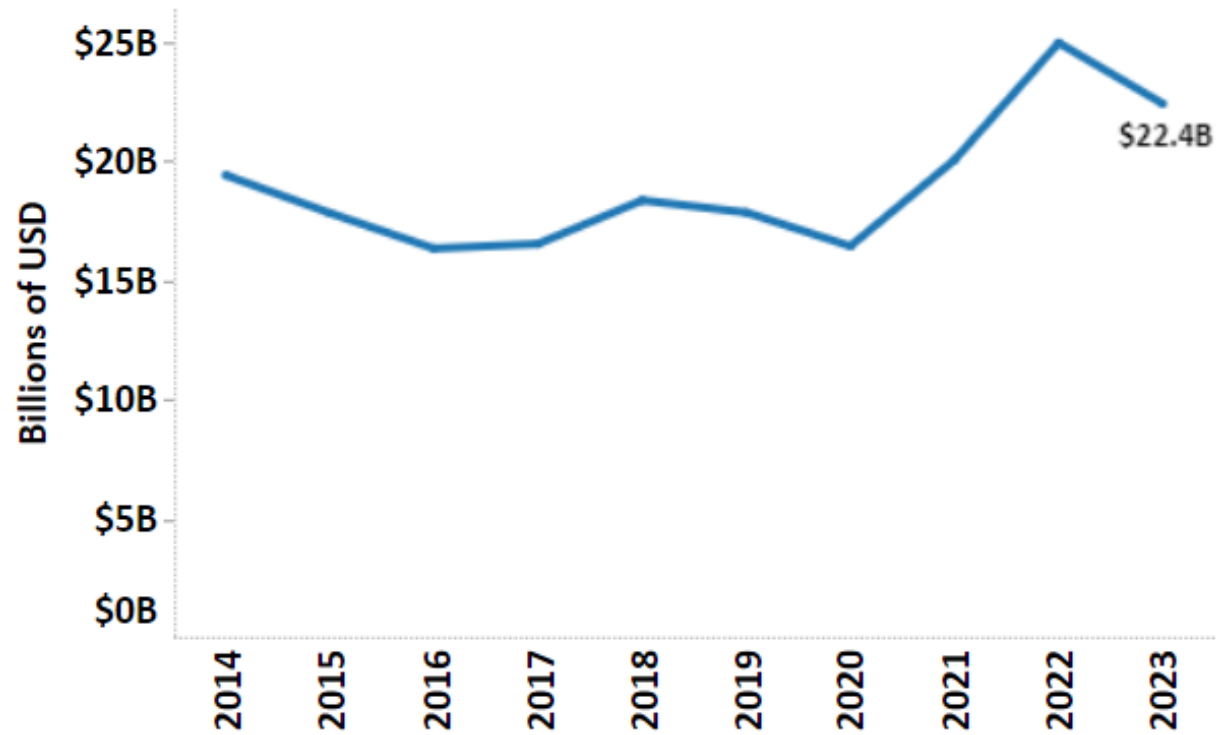
INDIA

MEXICO

NETHERLANDS

GERMANY

### Goods Exports to the World 2014-2023



### Goods Exports by Country (in millions)

Partner	2023
World	\$22,395
Canada	\$3,558
China	\$1,998
India	\$1,830
Mexico	\$1,239
Netherlands	\$1,002
Germany	\$951
Brazil	\$864
United Kingdom	\$740
Taiwan	\$730
Belgium	\$696
Singapore	\$690
Japan	\$641
Poland	\$440
Australia	\$405
South Korea	\$356

EXPORTERS

5,169

Virginia companies exported goods in 2021

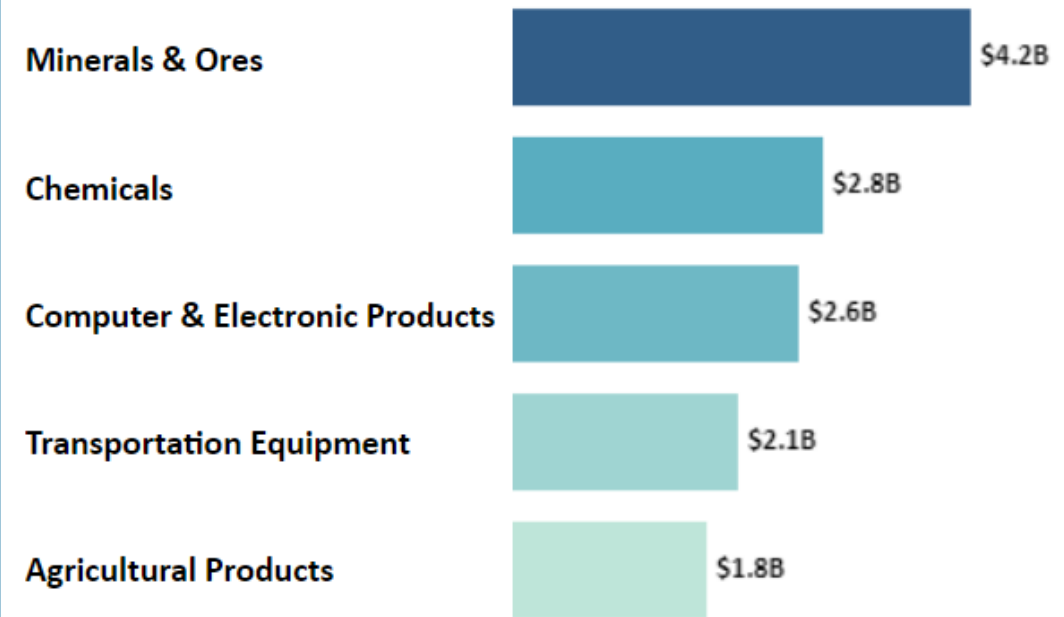
84%

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

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

TOP TRADE SECTORS

Virginia Top Goods Export Sectors in 2023



# International Students

# VIRGINIA

INTERNATIONAL  
STUDENTS  
*2022/23*

19,365

STUDENT-VISIT  
RATIO

1.7%

INDEXED  
STUDENT-VISIT  
RATIO  
U.S. = 100

195

# VIRGINIA

## INTERNATIONAL STUDENTS, 2022/23



**19,365**

International Students



**18**

Rank in the United States\*



**8.5**

% Change from  
Previous Year



**\$702,437,522**

Estimated International  
Student Expenditure\*\*

## LEADING PLACES OF ORIGIN

Place of Origin	% Total
India	<b>24.5</b>
China	<b>20.7</b>
South Korea	<b>5.6</b>
Saudi Arabia	<b>3.9</b>
Bangladesh	<b>2.7</b>

## LEADING INSTITUTIONS

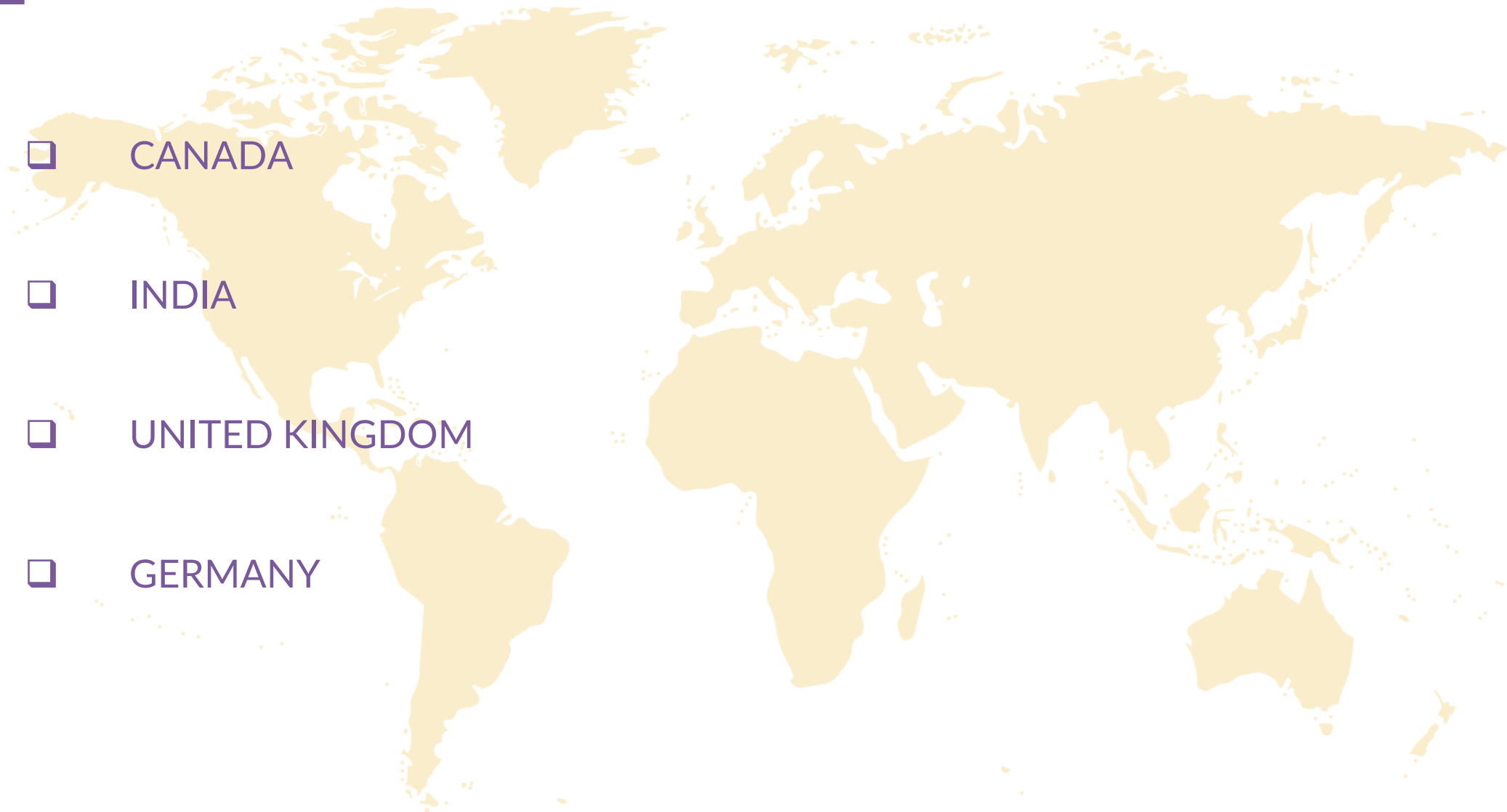
Institution	Total
Virginia Polytechnic Institute and State University	<b>4,650</b>
George Mason University	<b>4,555</b>
University of Virginia - Charlottesville	<b>2,988</b>
Virginia Commonwealth University	<b>1,129</b>
Northern Virginia Community College	<b>939</b>



# Visitor Perception

# MARKET PROFILES

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# 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
- 18.6% Museums and culture
- 17.5% National Parks
- 17.3% Sightseeing tours
- 16.8% Important or iconic attractions
- 14.4% Theme parks
- 14.0% Ways to experience nature
- 13.3% Level of crowds
- 11.6% Things to do outside the large cities
- 11.4% Outdoor activities (biking, hiking, etc.)
- 10.3% Touristy attractions to avoid
- 10.3% Professional sporting events
- 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

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



**1+ Trips**

---

46%

**1 Trip**

---

20%

**2 Trips**

---

11%

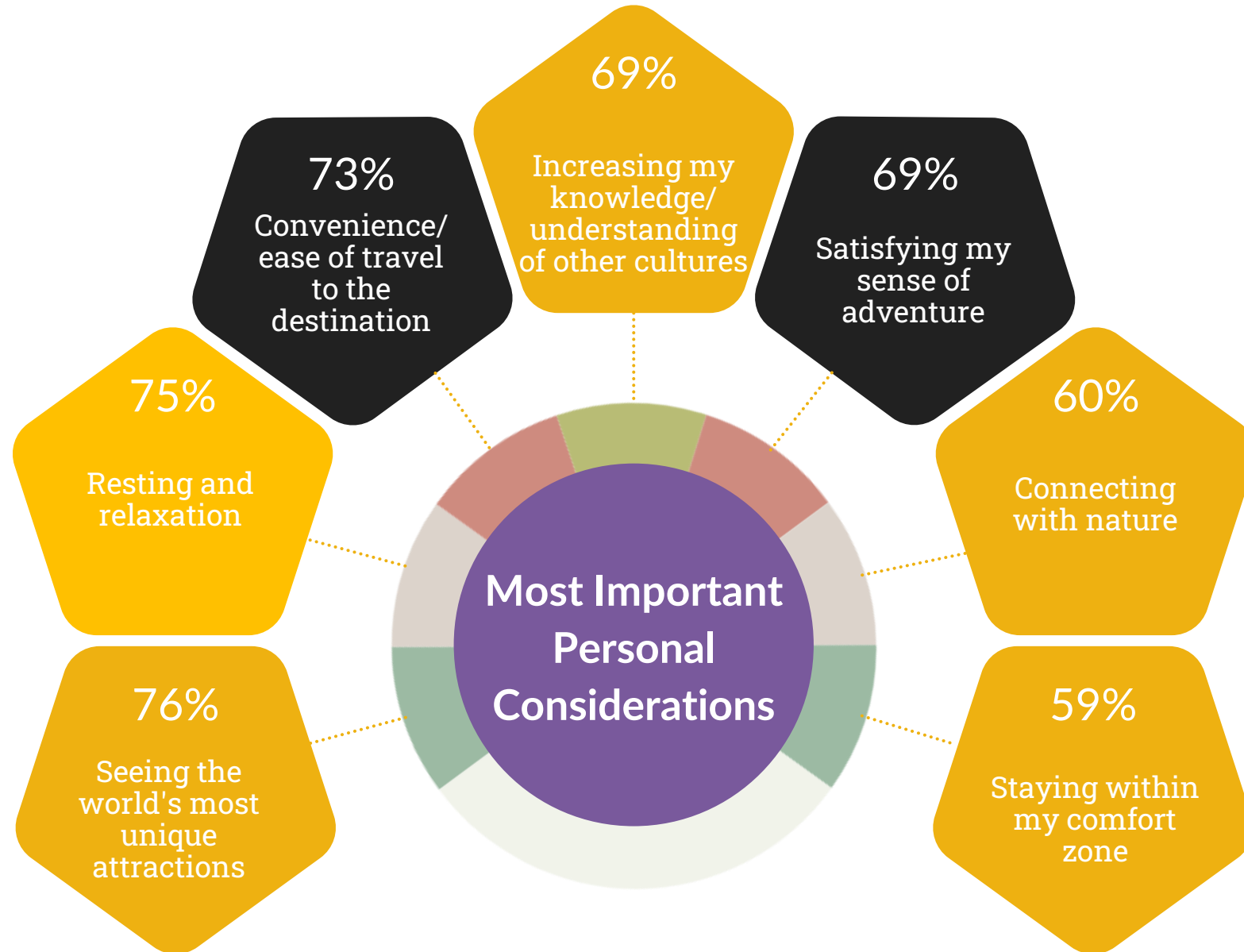
**3+ Trips**

---

15%

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

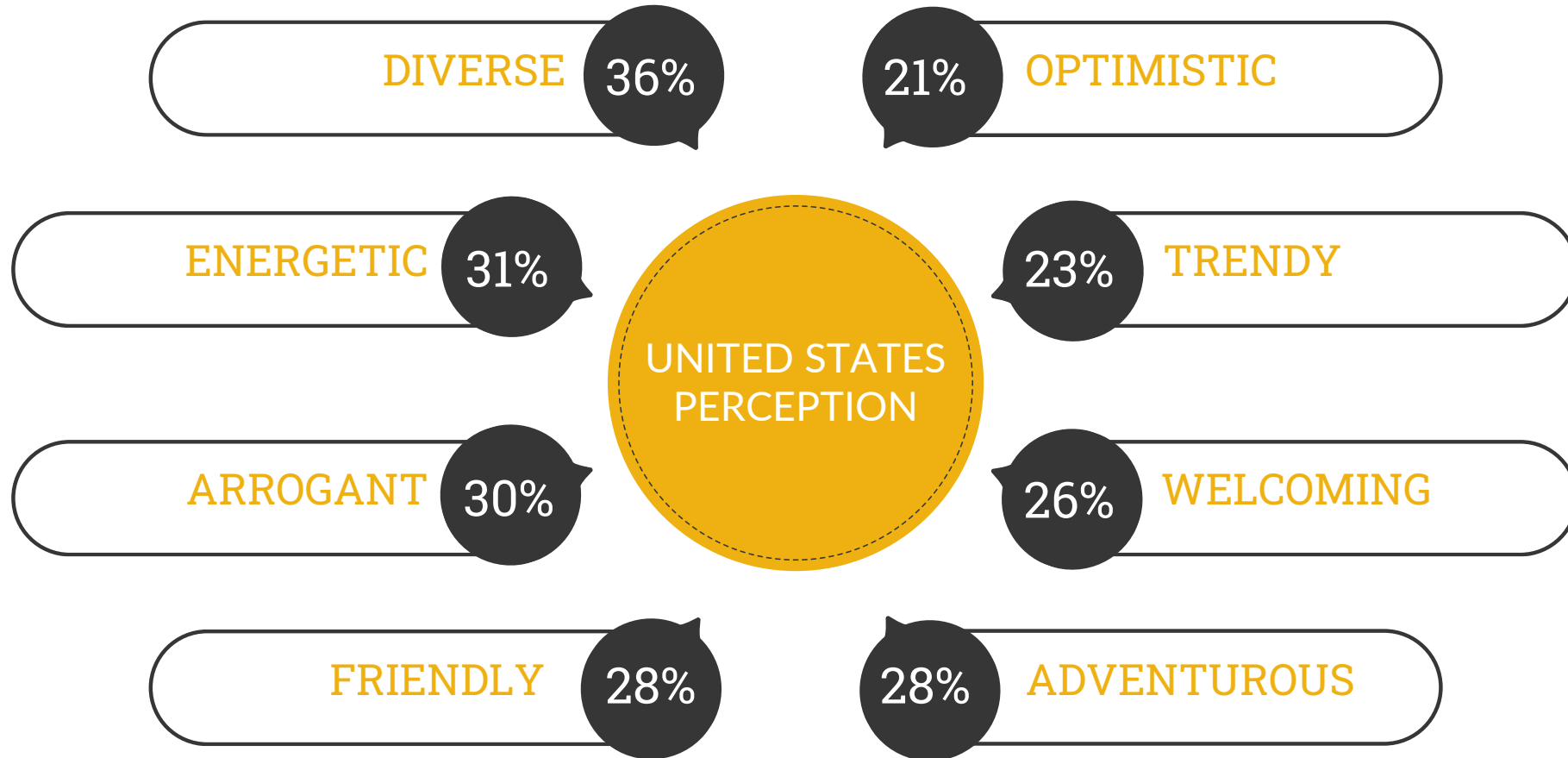
## Most Discouraging From Visiting a Destination

- 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)

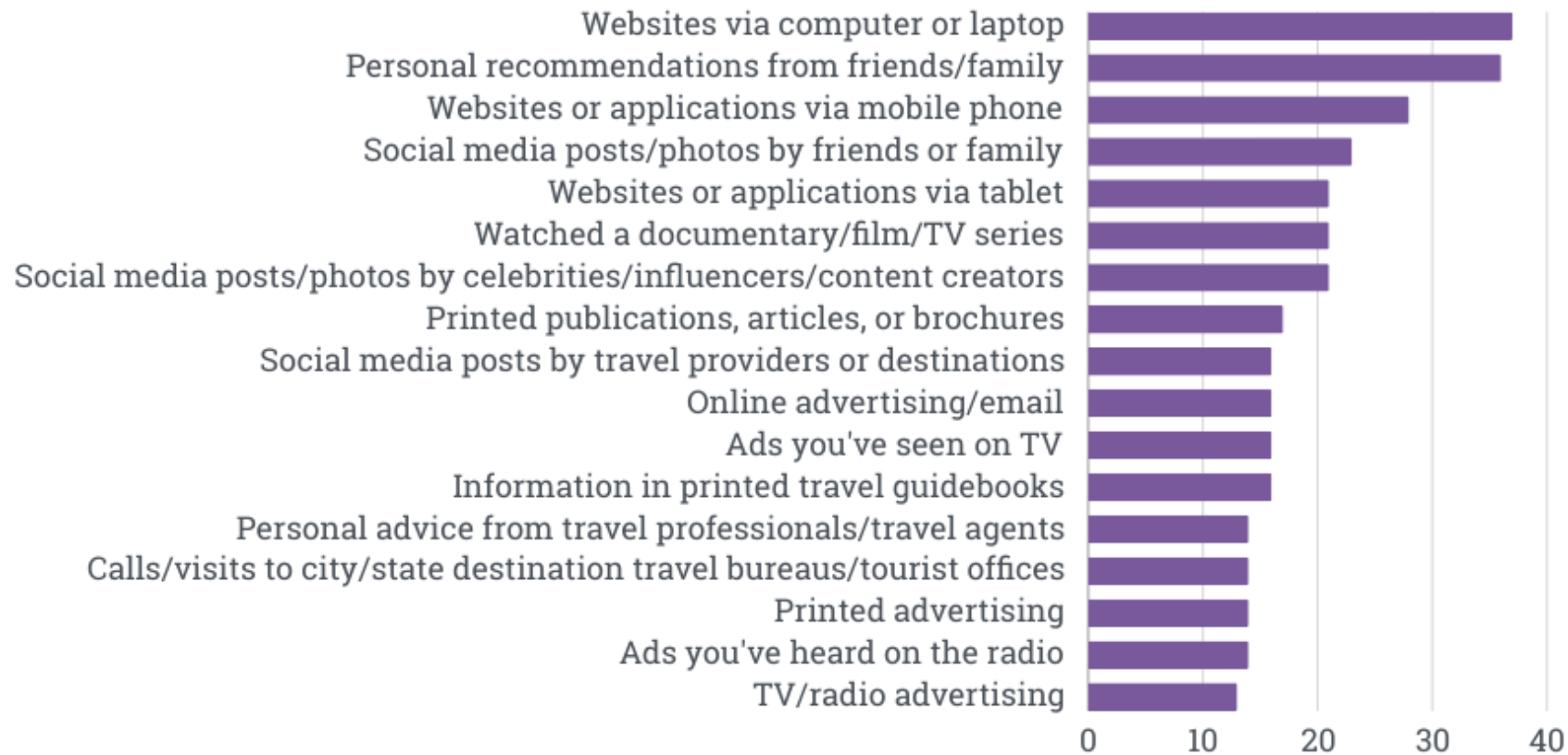
# CANADA



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%
YouTube	65%
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

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## 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

# INDIA



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*

1.4B

6.3%

82.57

4.6%

27.1%

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
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- 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.

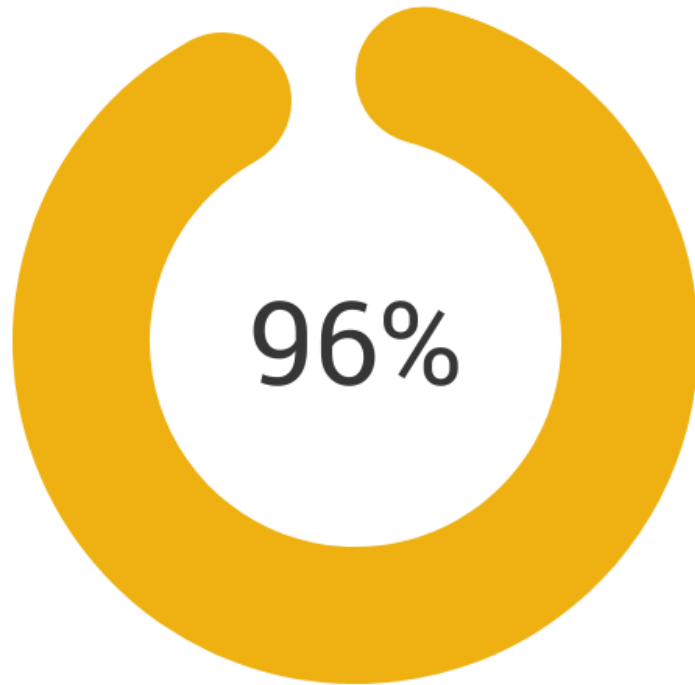


Note: Indian visitors who are Likely to Travel Internationally

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

---

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**

---

87%

**1 Trip**

---

32%

**2 Trips**

---

25%

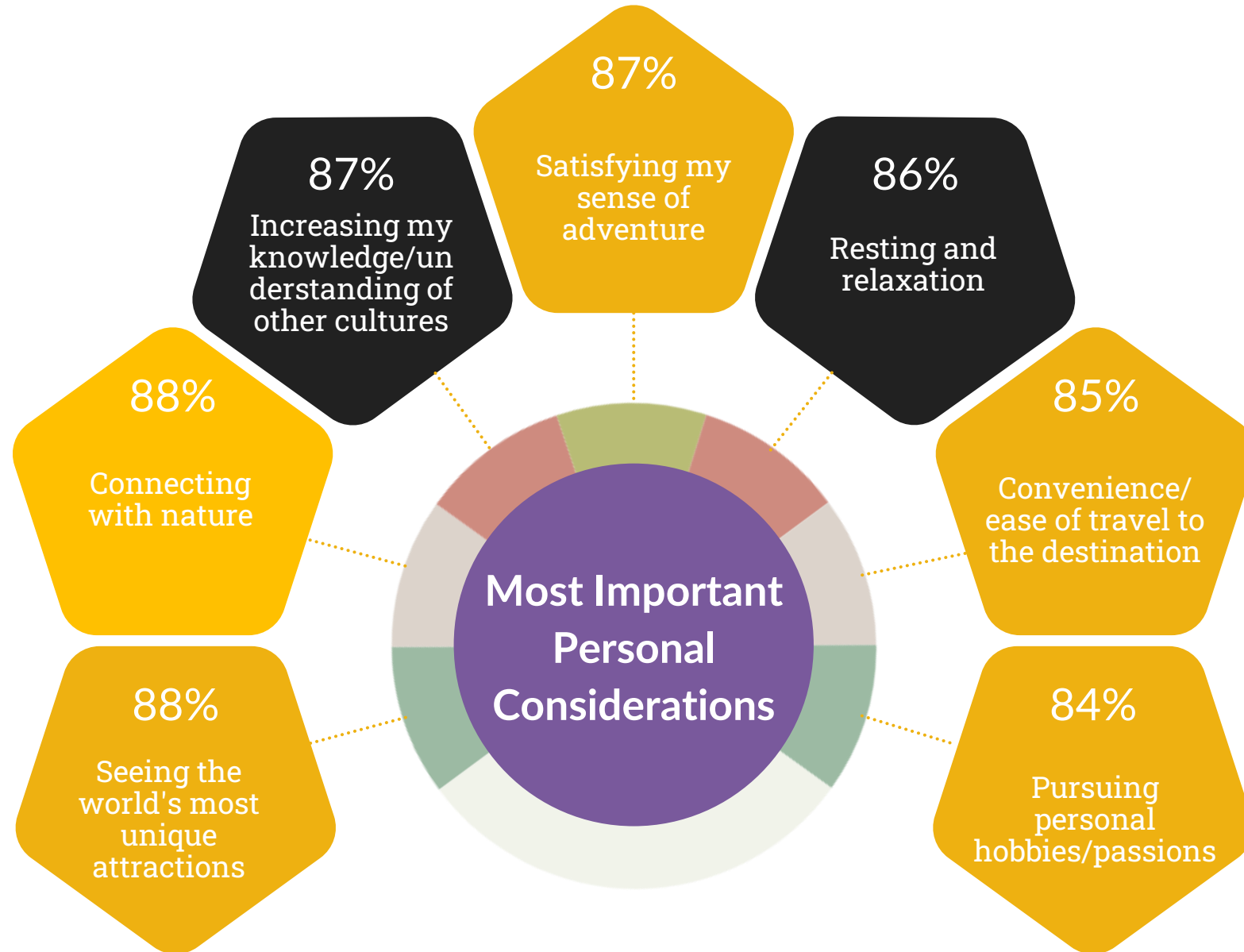
**3+ Trips**

---

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

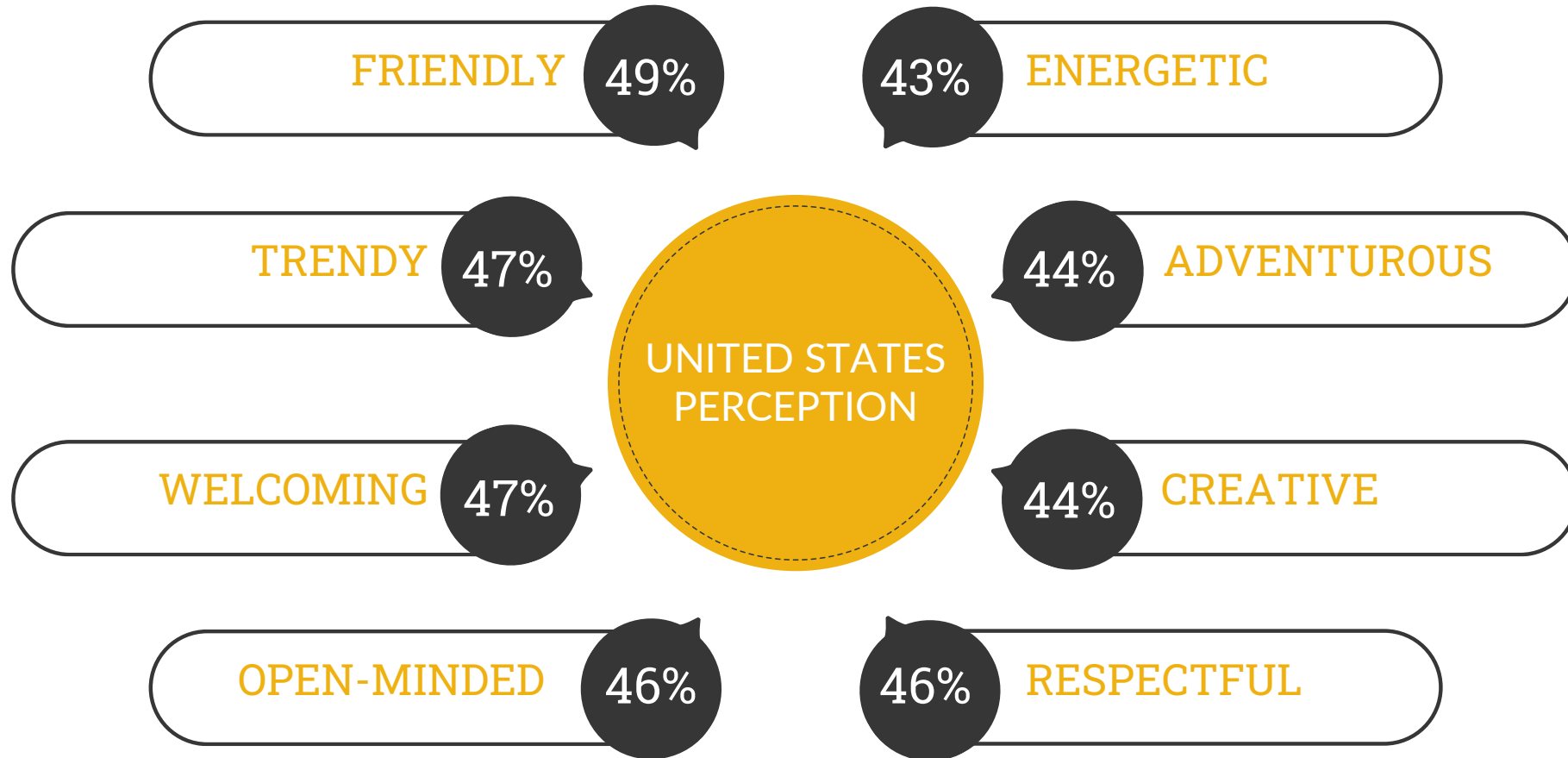
- 43% Personal safety concerns
- 40% Lack of information for me to plan my trip
- 40% Inconvenience of travel to the destination
- 39% Political climate not aligning with personal views
- 39% Cleanliness in the destination
- 39% Environmental responsibilities and efforts
- 38% Visa requirements/entry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

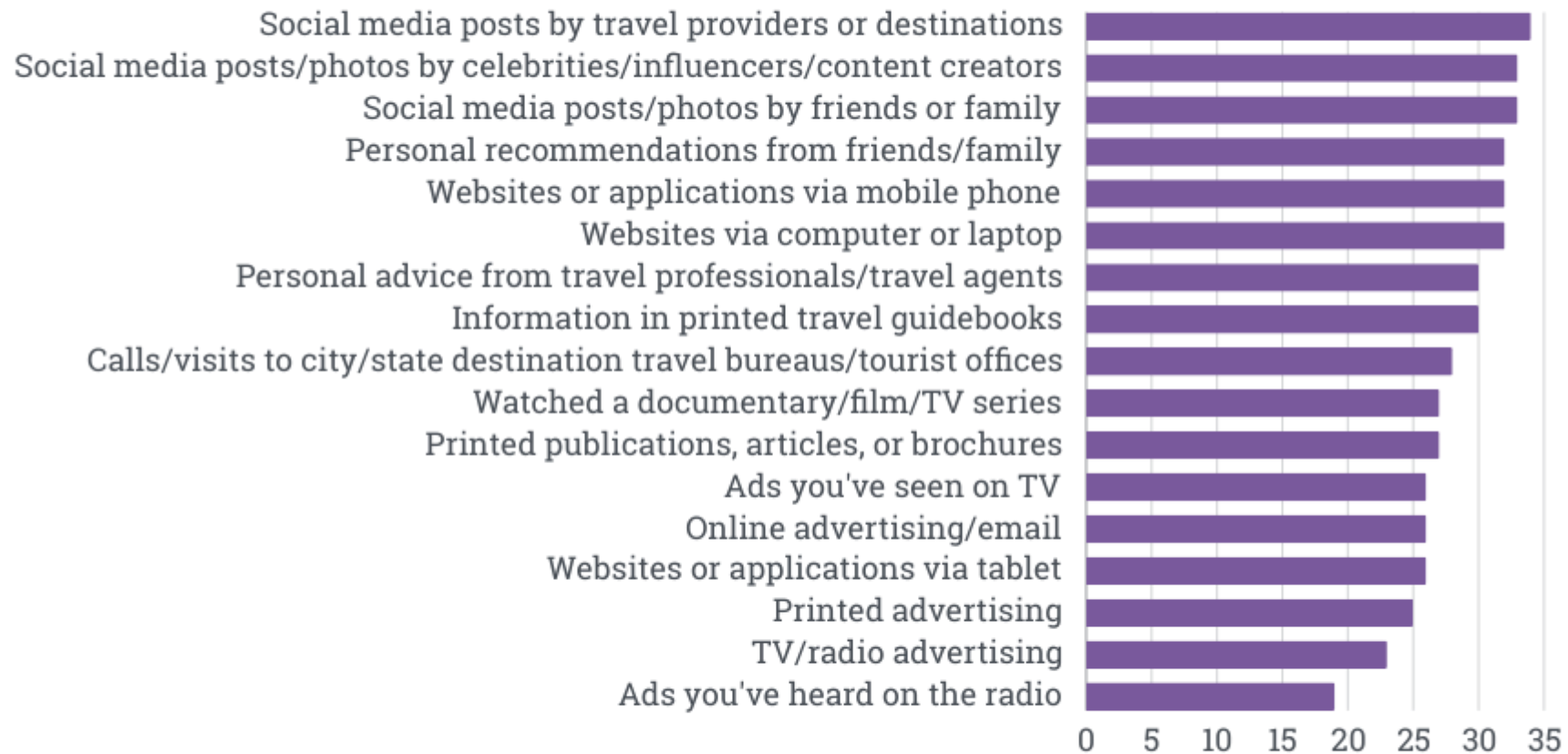
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Note: Indian visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

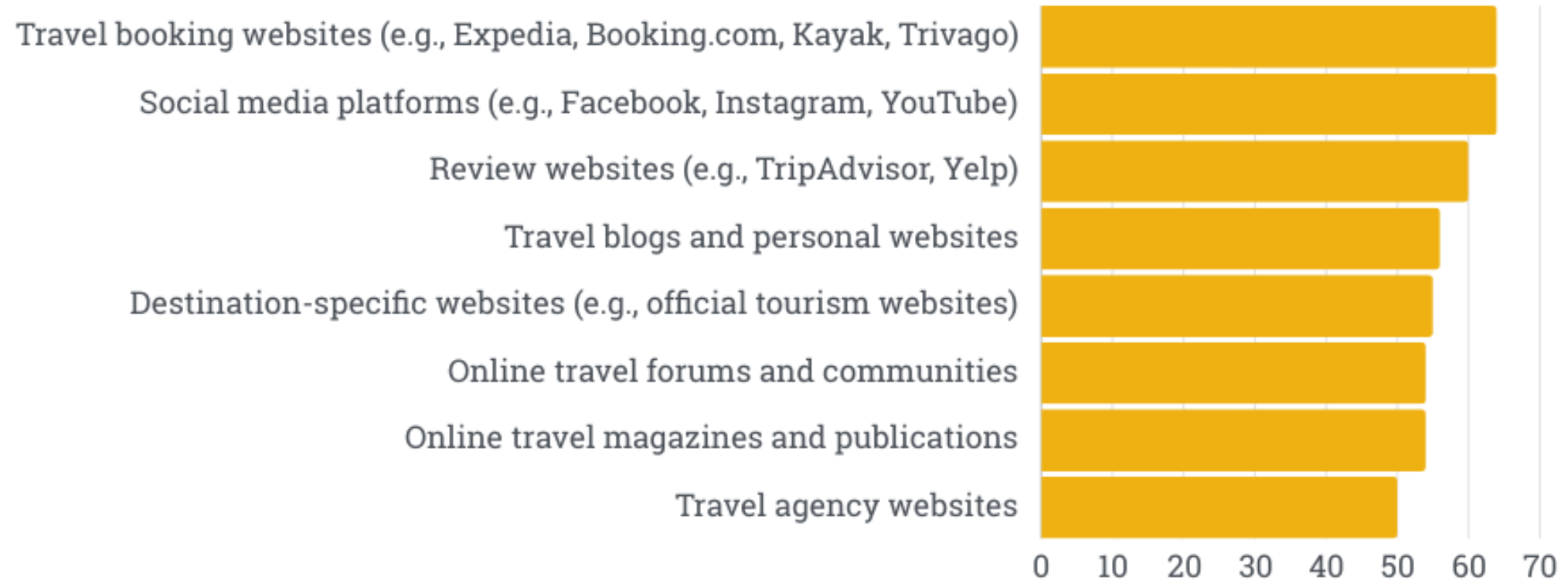
## Sources of Information for Destination Selection



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

---

## 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

# 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

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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.

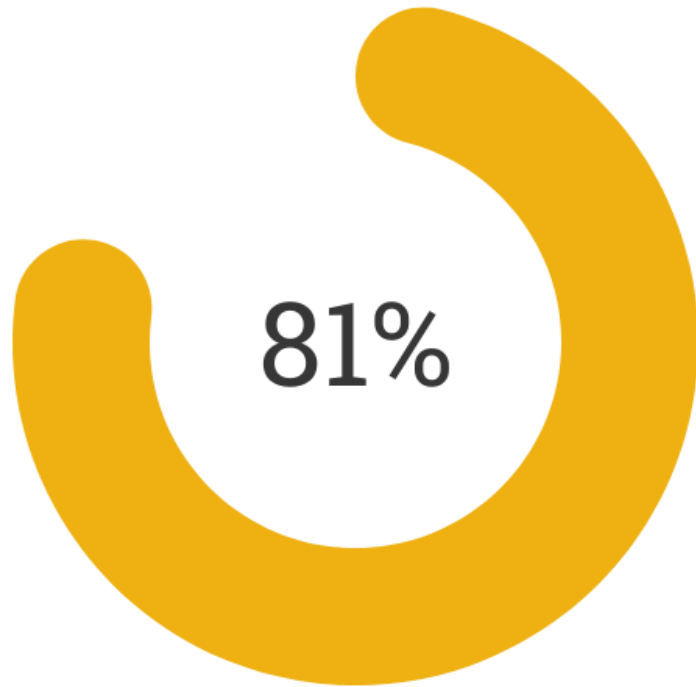


Note: United Kingdom visitors who are Likely to Travel Internationally

Source: Future Partners (2024)

# UNITED KINGDOM

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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

# 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%

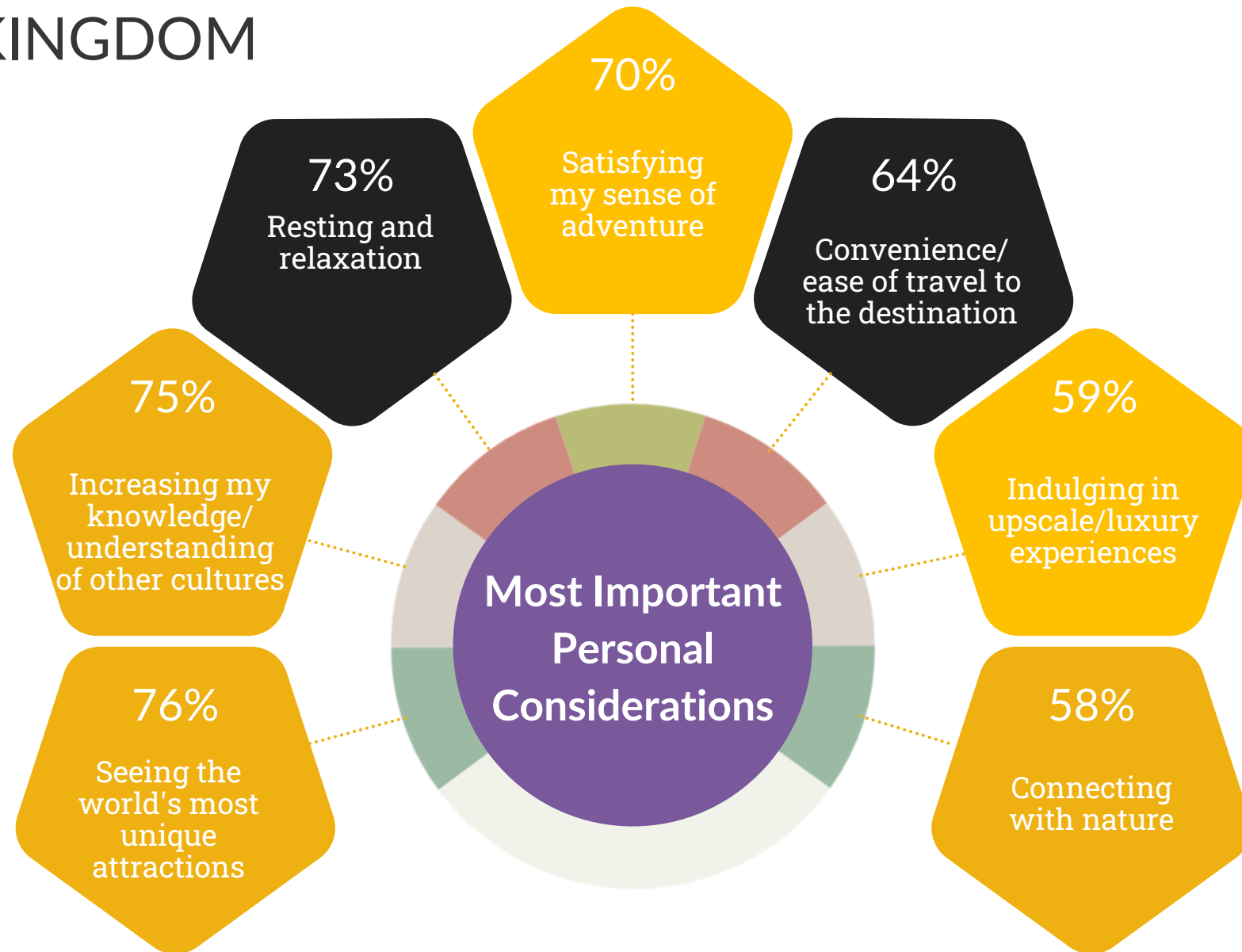
3+ Trips

---

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

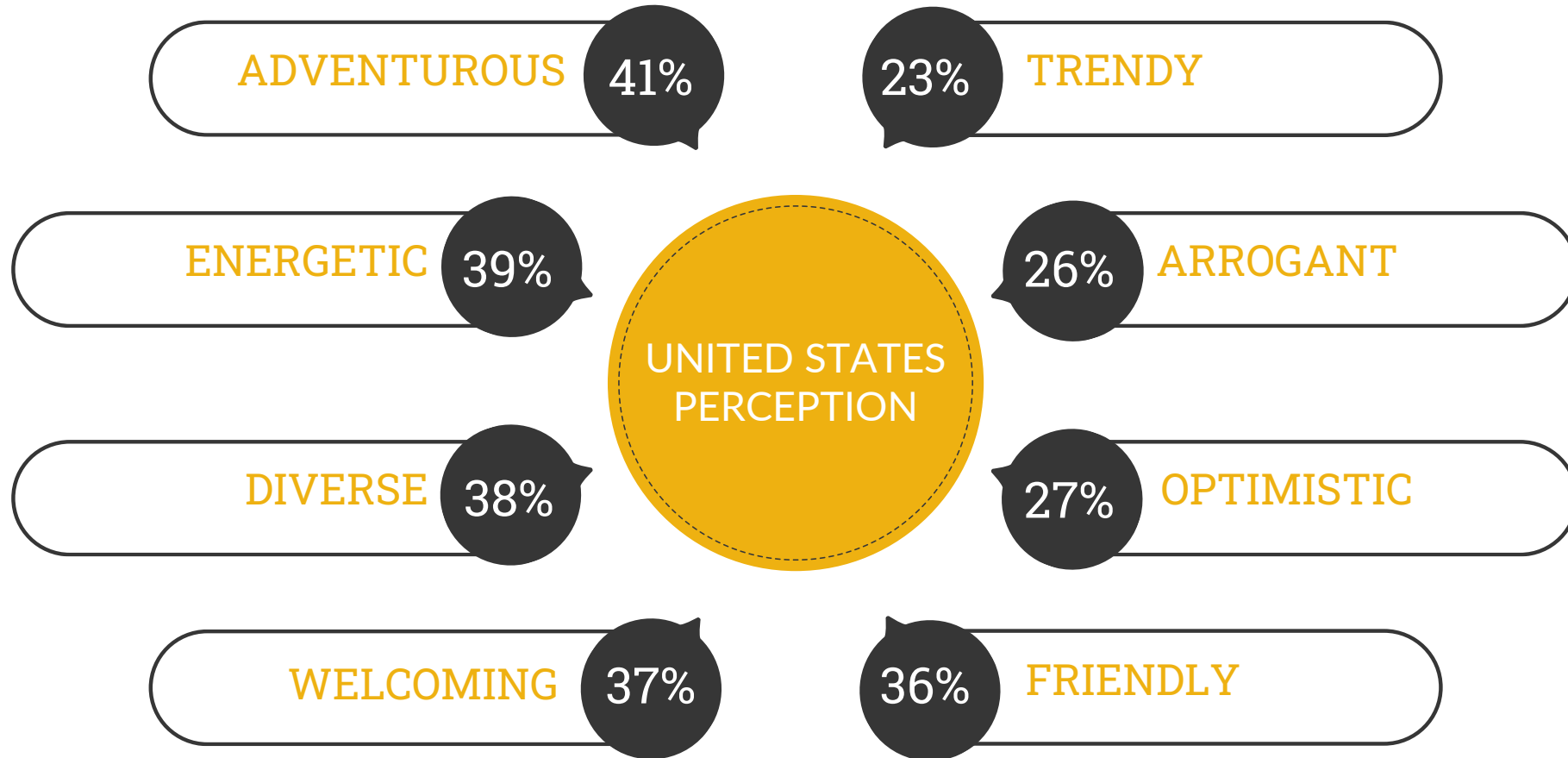
## Most Discouraging From Visiting a Destination

- 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

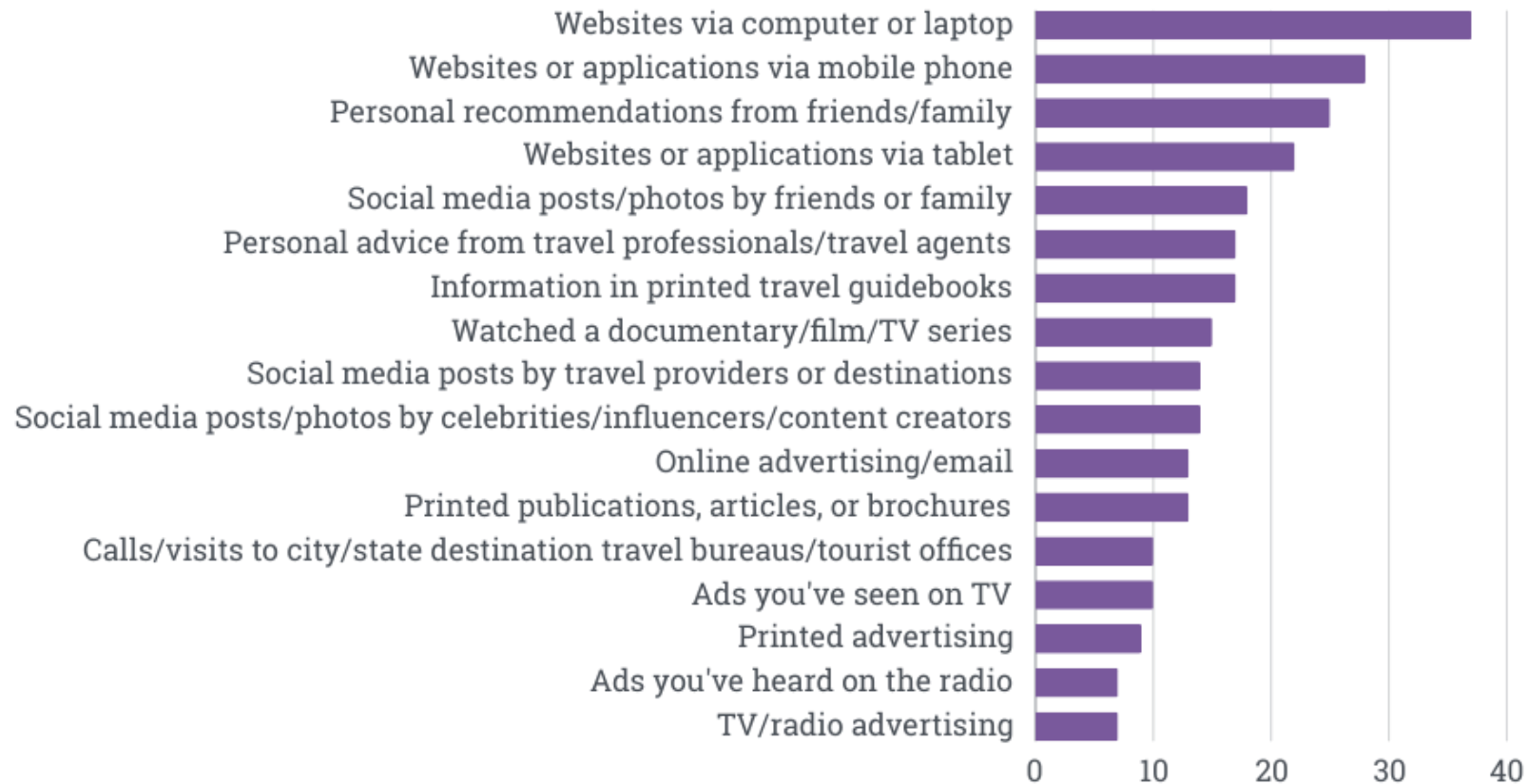


Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)



## Sources of Information for Destination Selection



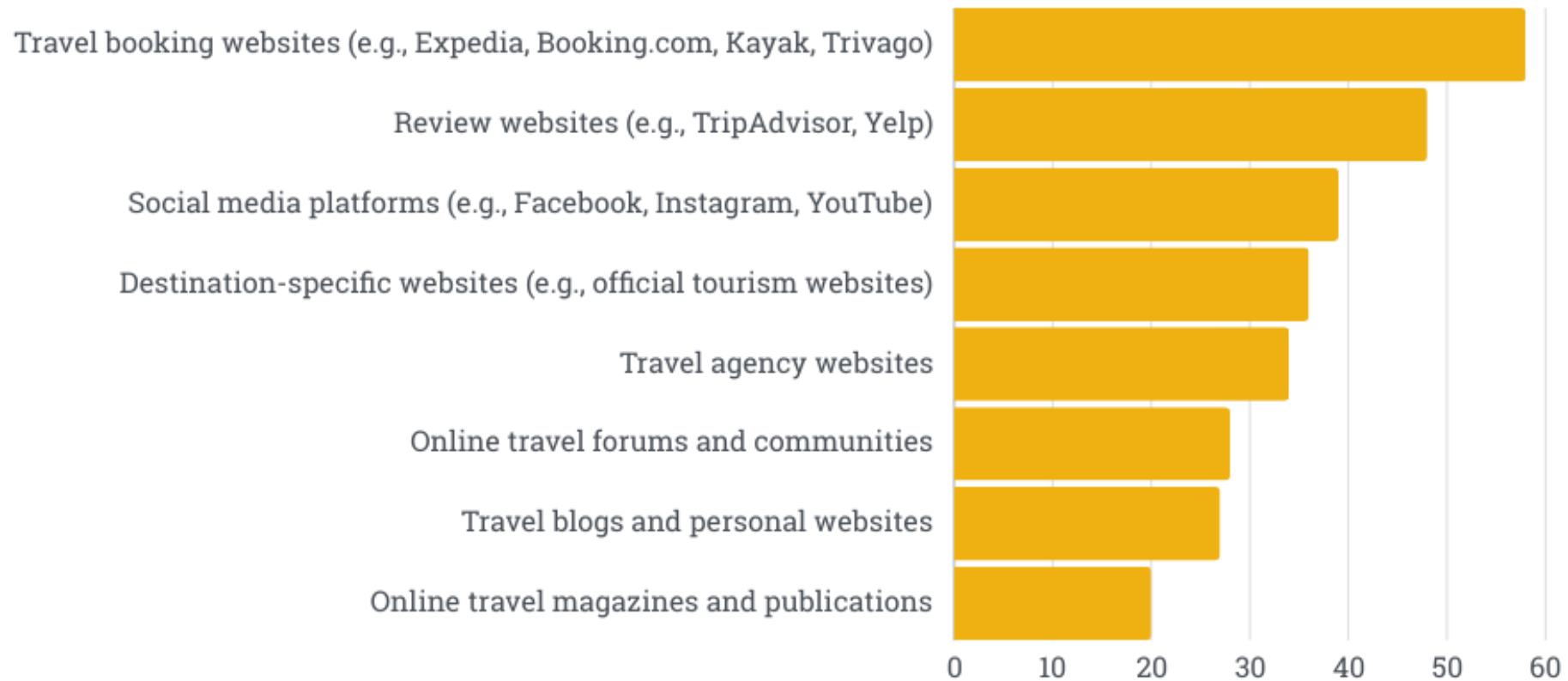
Note: United Kingdom visitors who have taken an overnight international trip since June 2021 and are interested in Visiting Travel South Region

Source: Brand USA (Aug. 2023)

# UNITED KINGDOM

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## 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

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## 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

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## 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
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- 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

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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)



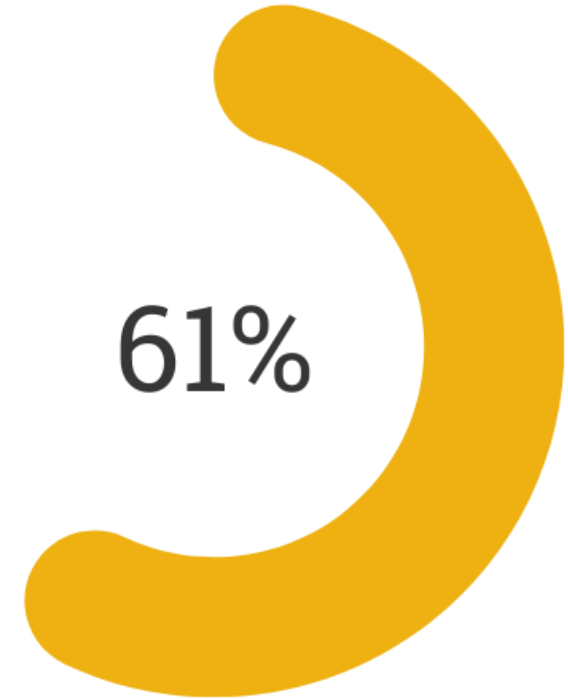
# GERMANY

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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

# 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

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# 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**

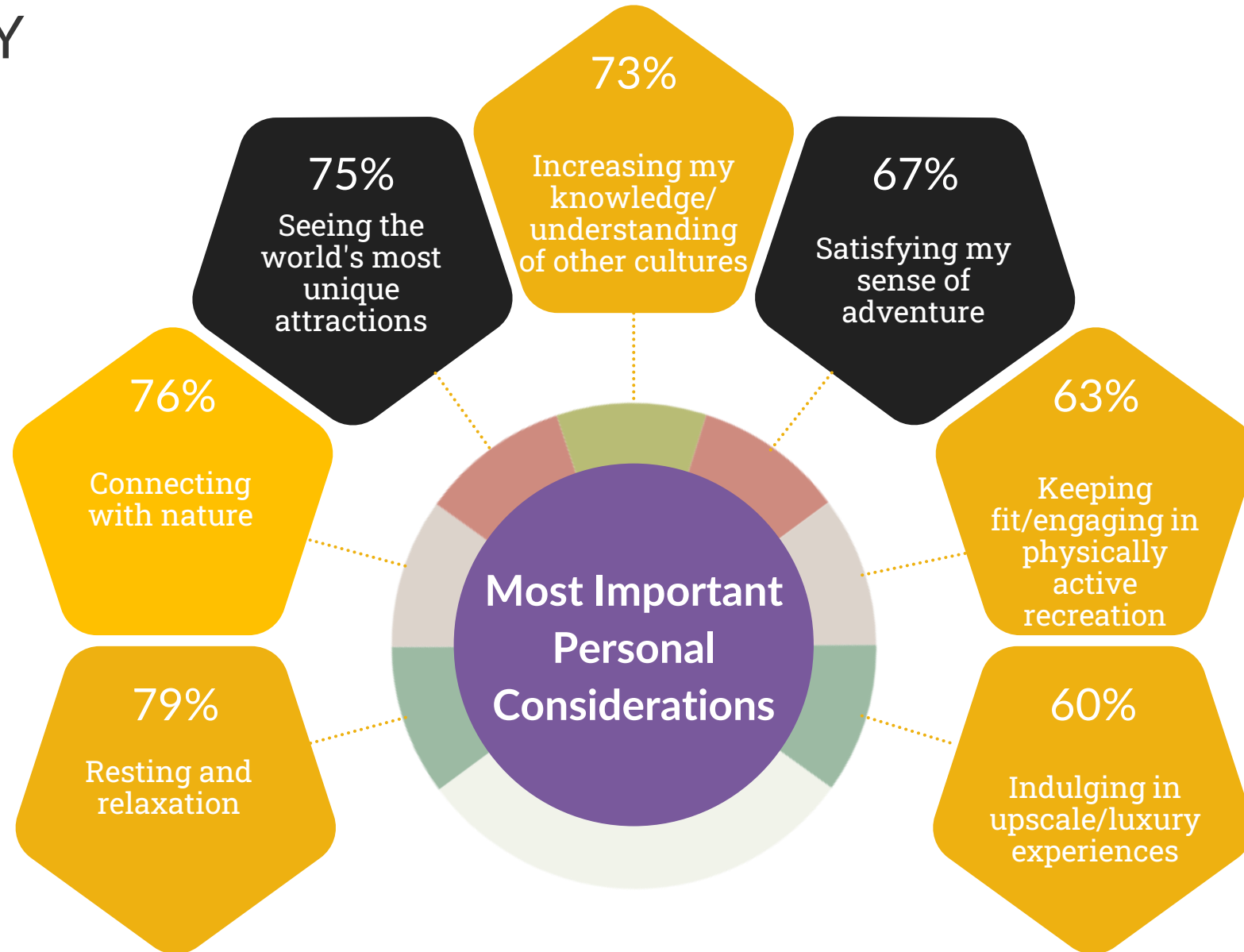
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19%

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

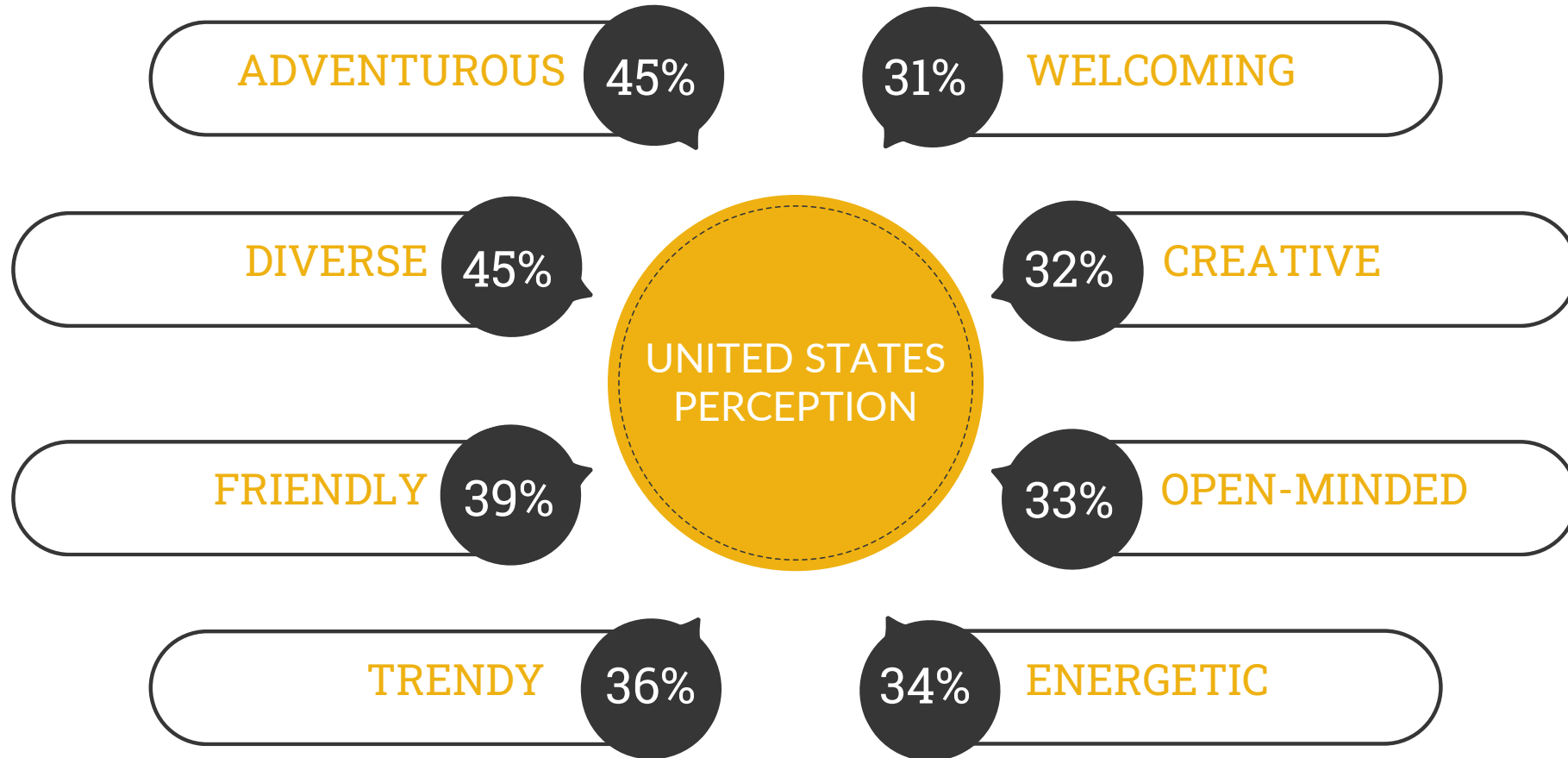
## Most Discouraging From Visiting a Destination

- 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)

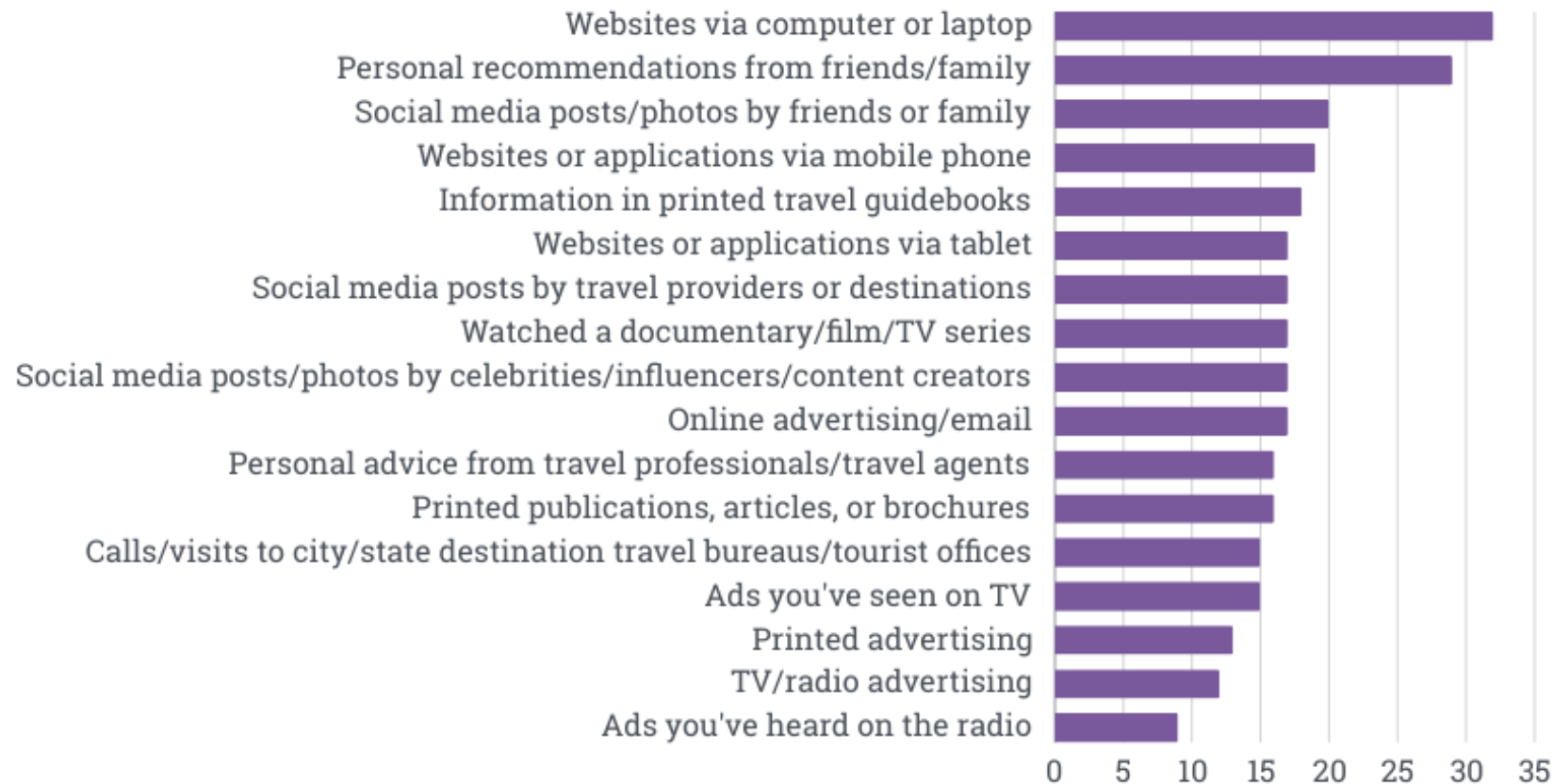
# GERMANY



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)

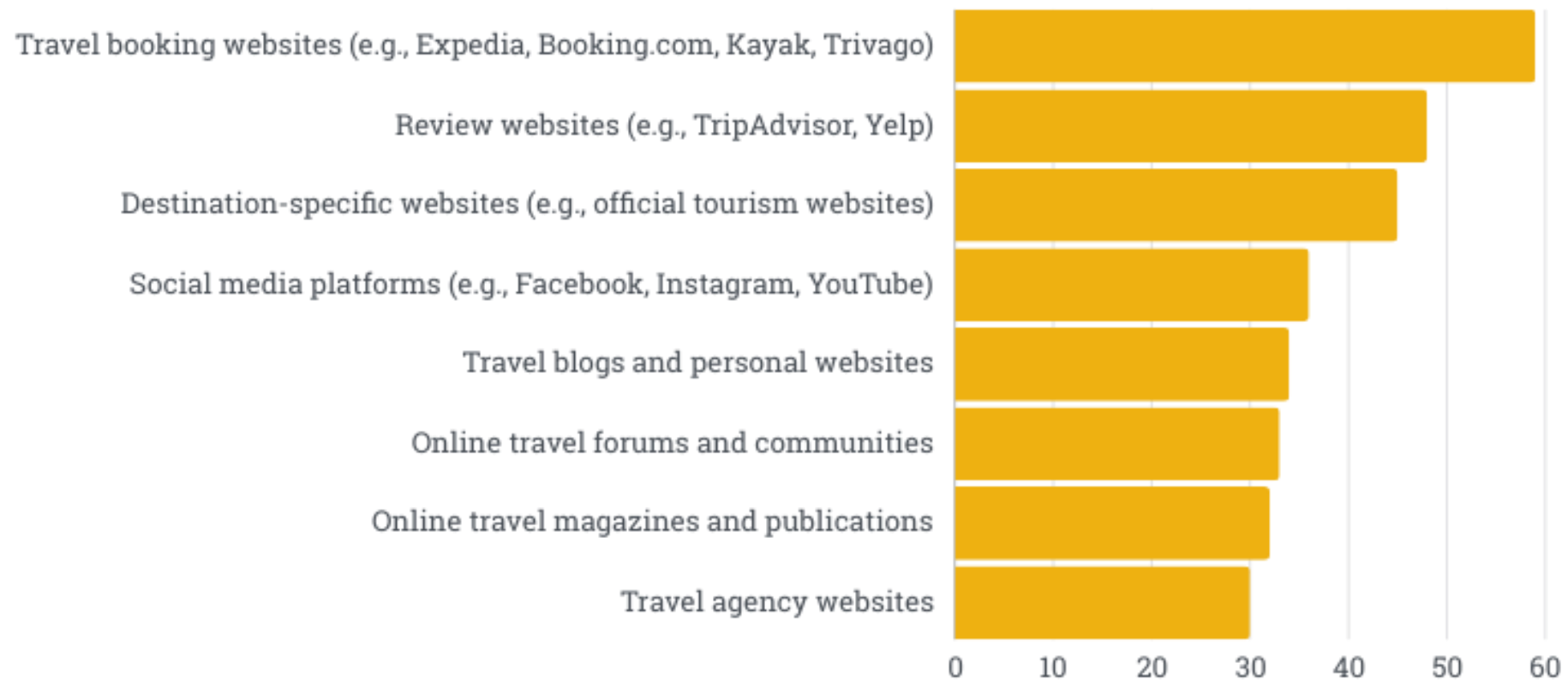
## Sources of Information for Destination Selection



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.)

# 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