

TRAVEL SOUTH  USA

ALABAMA

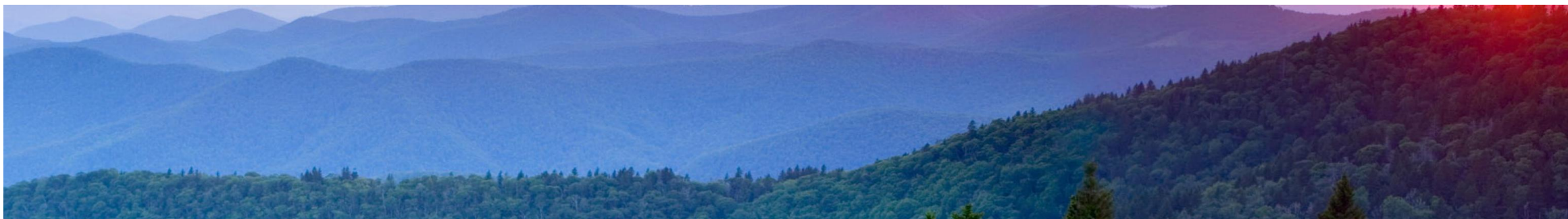
Sweet Home
Alabama
www.Alabama.Travel

INTERNATIONAL MARKETS

April 2025

International Travel

1. The U.S. travel landscape is facing near-term challenges driven by uncertainty, geopolitical tensions, trade policy shocks and immigration
 - ❑ Trade shocks and immigration enforcement are weakening U.S. national competitiveness in the short term
 - ❑ Rising negative sentiment among leisure and business travelers is posing a risk to travel demand
2. Steep Decline in Inbound International Travel forecasted for 2025
 - U.S.
 - ❑ 9.4% drop in international arrivals
 - ❑ \$9.0B loss in visitor spending, with Canada accounting for ~\$3.4B
 - Travel South
 - ❑ 11% drop in international arrivals
 - ❑ \$421M loss in visitor spending, with Canada accounting for ~\$250M



*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.*

Visitor Economy

Overview of Historic & Forecast Visitation and Spending by Tourism Economics

Exports (Goods)

Exports Market snapshot by the Office of Trade and Economic Analysis

International Students

International Student Survey Results from Open Doors

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

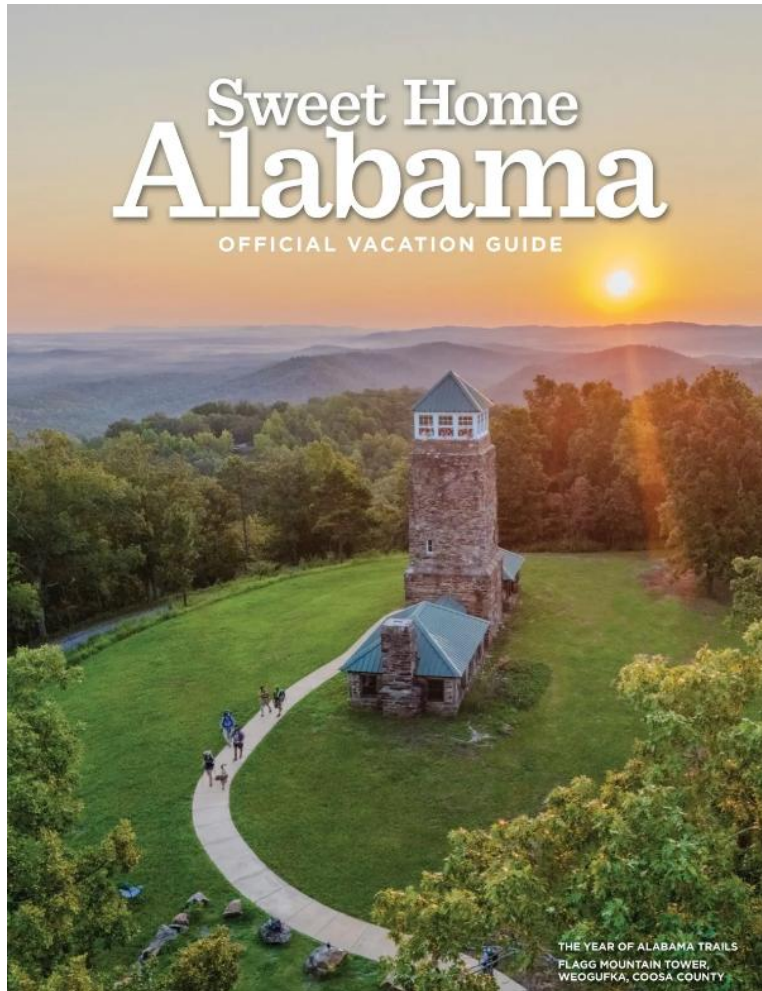
Resources

Links to Market Profiles, along with other Travel South resources

Alabama's International Visitor Economy



Highlighting the State's Global Interconnectivity



Outlook

- By 2025, forecasted to reach **\$512 million** and **296,000 visitors**

US Inbound Travel Rebound – Key Markets

- International inbound spending is expected to decline by 3% from 2024, an 11% decrease compared to 2019.
- **Japan, India and Brazil** are projected to grow in 2025, with **Sweden and Australia** remaining flat.
- Fueled by visitors from **United Kingdom/Ireland, DACH Region, Canada, India, Brazil, Japan, France, China, South Korea, and Italy**, accounting for **62%** of the state's 2023 international tourism expenditures

Exports by Market

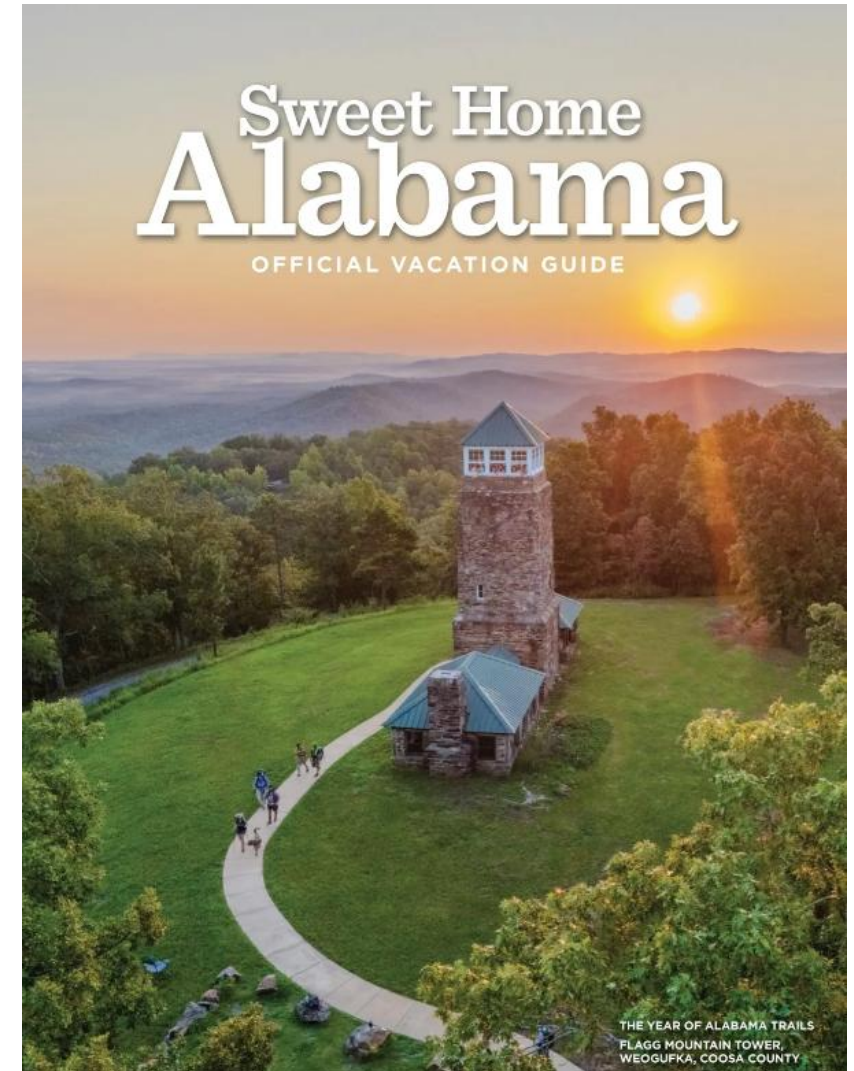
- **3,000** companies exported **\$27 billion** worth of goods
- Exports to **Germany, Canada, China, Mexico, Japan and South Korea** are among the top origin markets of visitation
- **India and China** account for half of the international student population
- **64%** of visits are non-business related

Alabama's International Visitor Economy

Highlighting the State's Global Interconnectivity, cont.

- Alabama'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 Alabama's strategic advantage.
- Major gateway airports like Atlanta, Chicago O'Hare, and Dallas allow easy access to the state.
- Proximity to neighboring states— Georgia, Tennessee, and Mississippi — attracts international travelers interested in the Travel South's natural beauty, cultural heritage, and connectivity, thus enriching Alabama's tourism landscape.

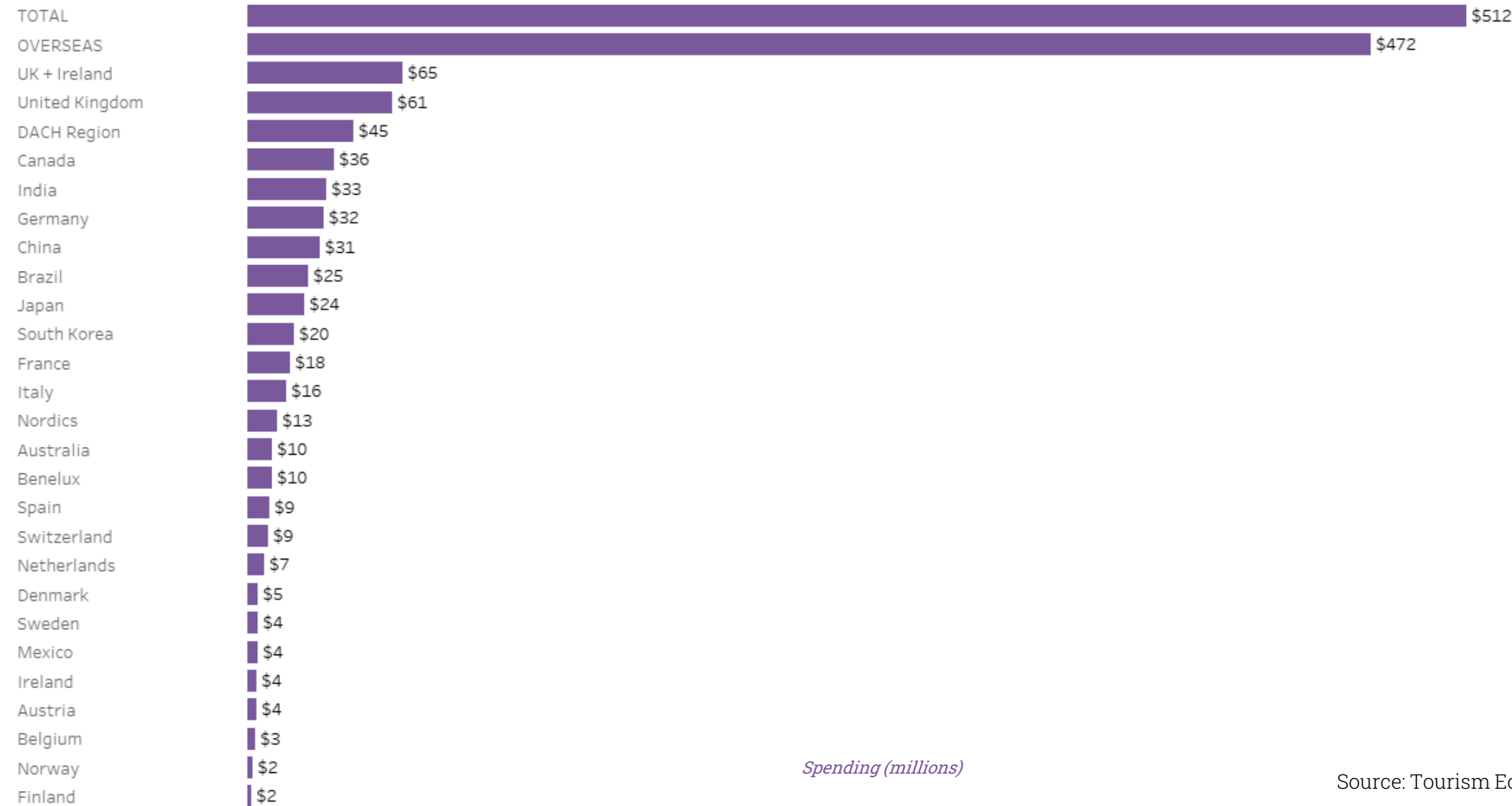
TRAVEL·SOUTH  USA



Visitor Economy

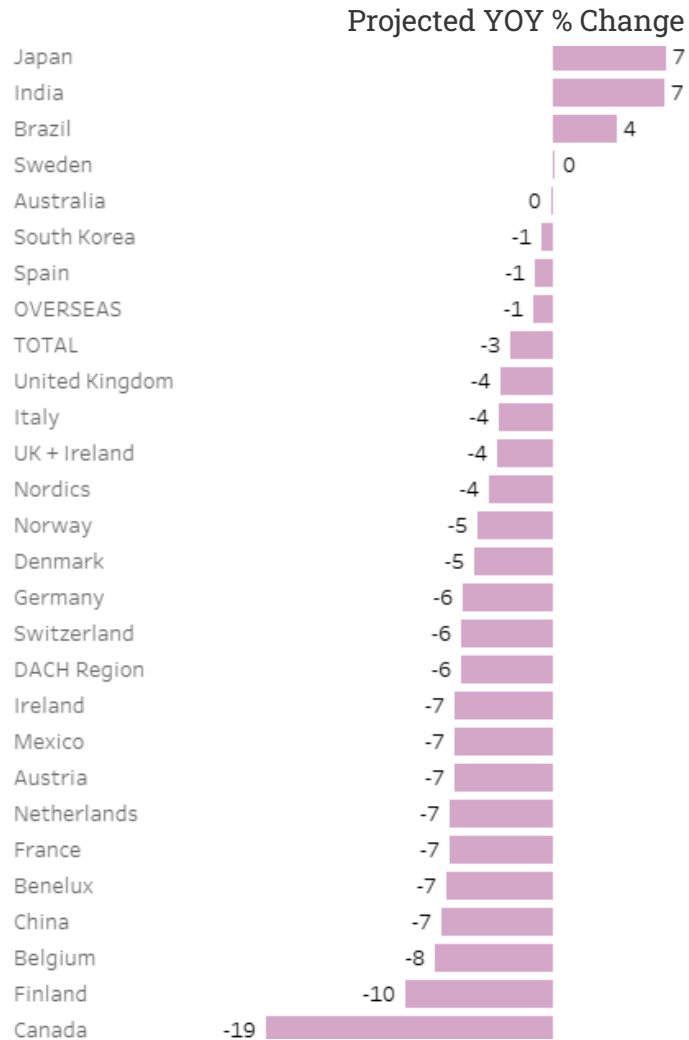
April 15, 2025

2025 Outlook: Visitor Spending by Key Markets

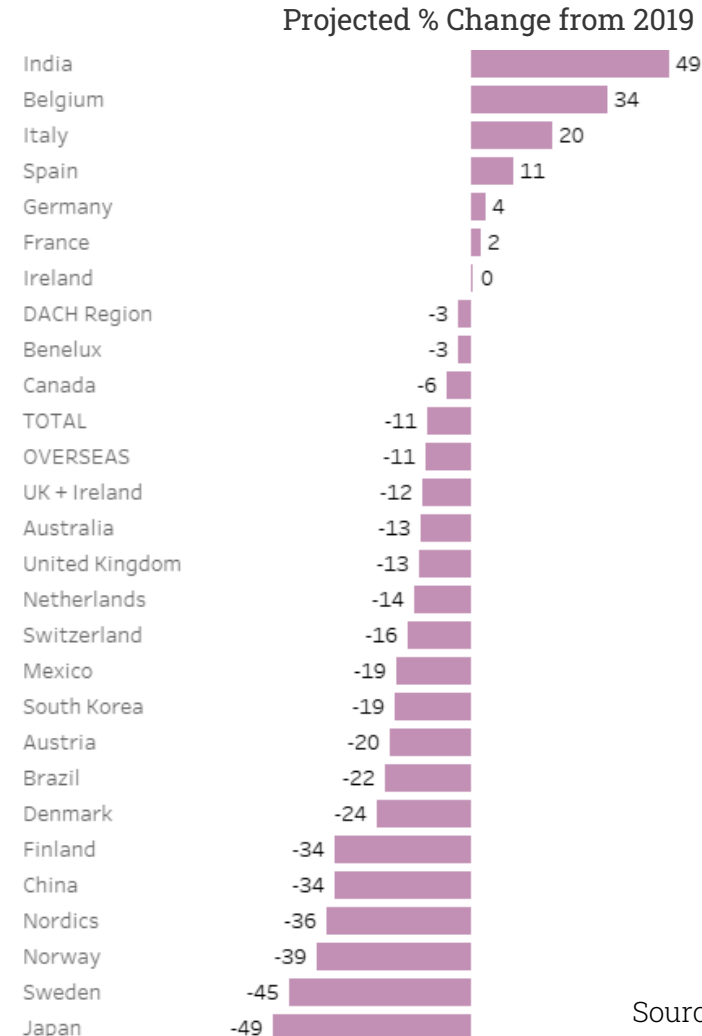


Spending (millions)

2025 Key-Market Spending Outlook: Year-over-Year Shifts

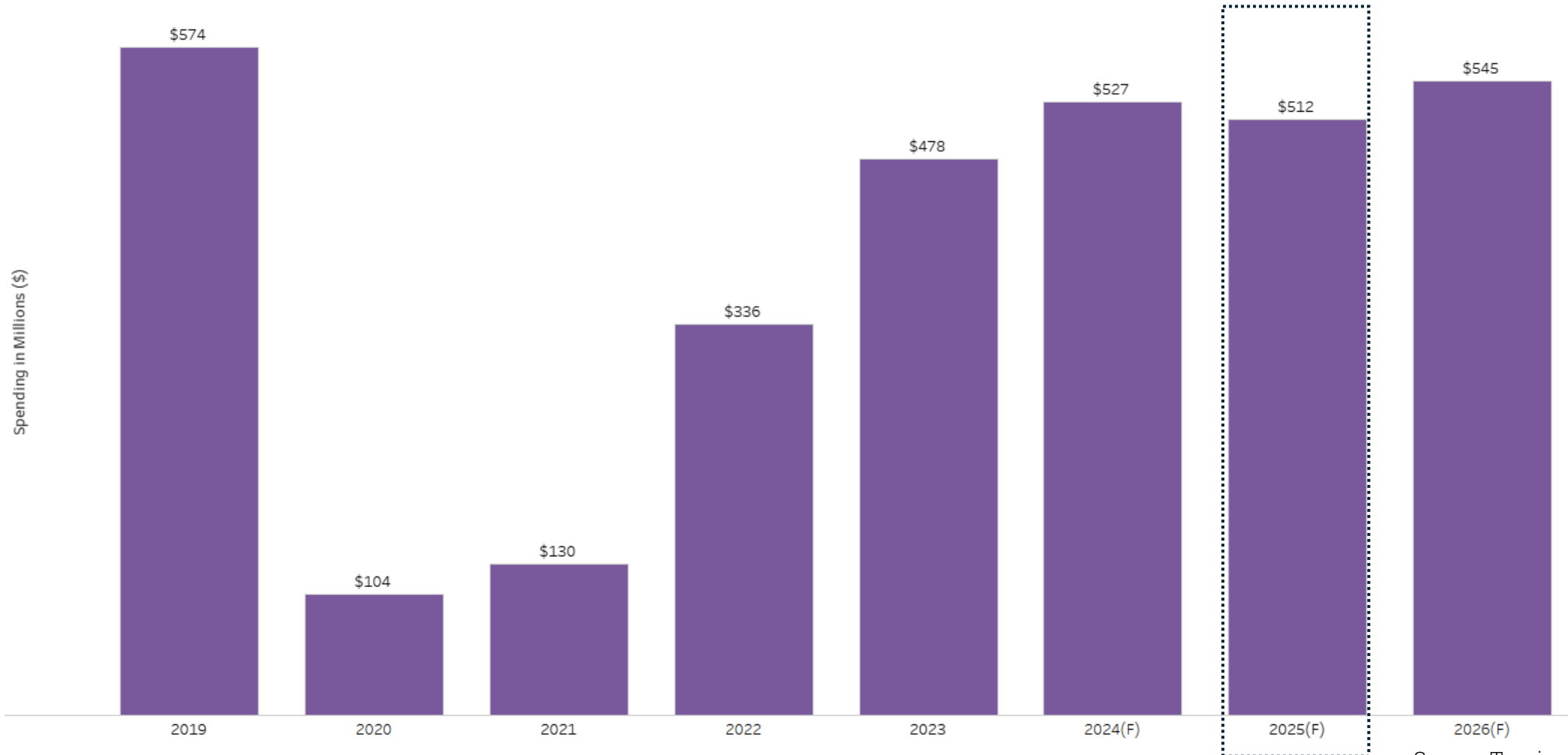


2019 Baseline Comparison



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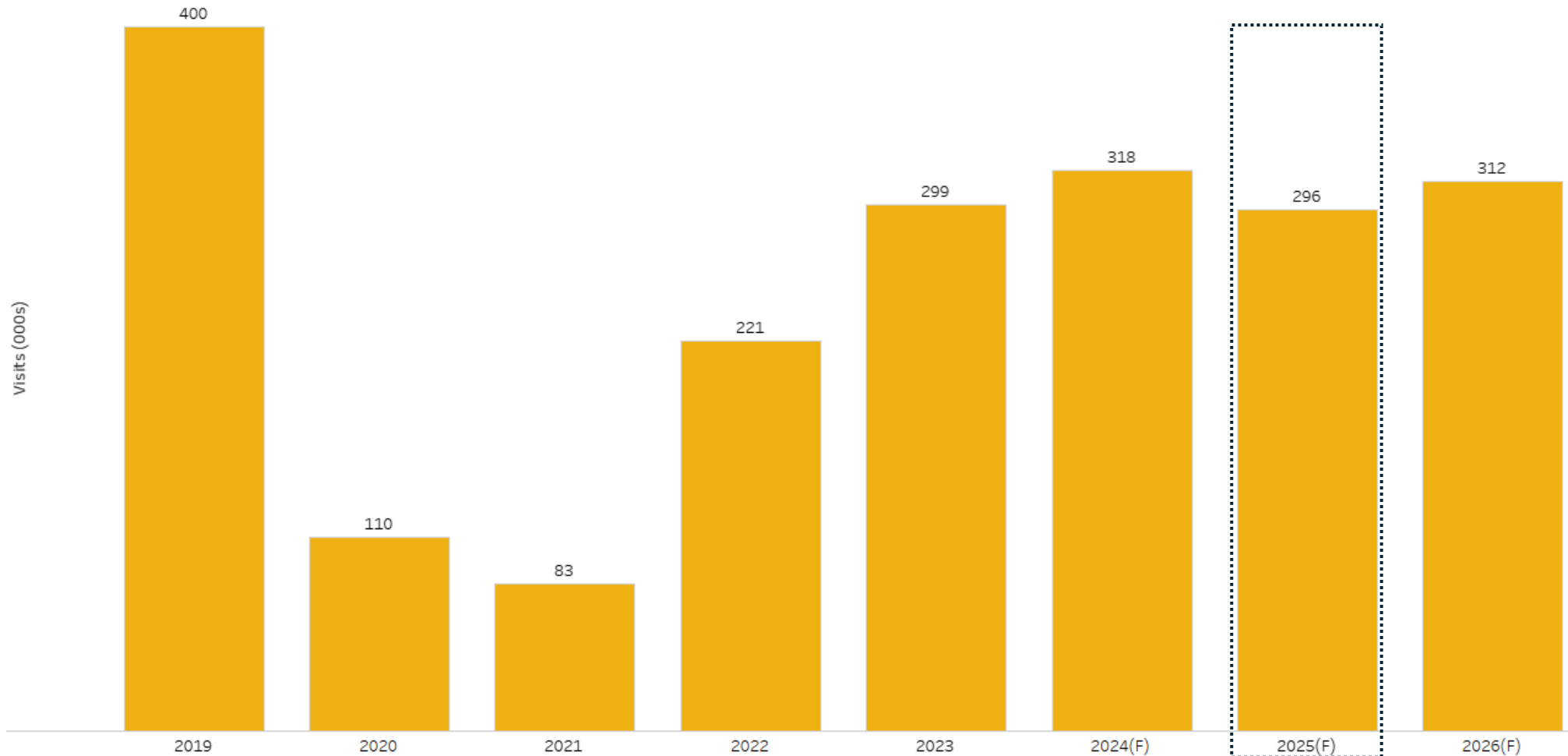
2025 Spending Outlook: Down 3% from 2024, still below 2019



ALABAMA



2025 Visitor Volume Outlook: Down 7% from 2024, still below 2019



ALABAMA

\$512M Projected Spend and 296,000 Visits in 2025, down 3% and 7% from 2024

- Tourism Economics estimates **Overseas spending** to decline by **1%** year-over-year (yoy) in **2025** – **Canada, a 19% decline**
- Japan, India and Brazil** are projected to grow in 2025, with **Sweden and Australia** remaining flat
- U.K./Ireland, DACH Region, Canada, India and China** are forecasted to be amongst the top five markets

	Spending (\$M)	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
TOTAL	512	-3	296	-7	-11	-26
OVERSEAS	472	-1	233	-3	-11	-27
UK + Ireland	65	-4	31	-5	-12	-32
United Kingdom	61	-4	29	-5	-13	-31
DACH Region	45	-6	22	-7	-3	-24
Canada	36	-19	54	-21	-6	-23
India	33	7	17	4	49	52
Germany	32	-6	16	-7	4	-21
China	31	-7	12	-7	-34	-57
Brazil	25	4	8	-1	-22	-35
Japan	24	7	17	7	-49	-51
South Korea	20	-1	10	-2	-19	-38
France	18	-7	12	-8	2	-28
Italy	16	-4	10	-5	20	-12
Nordics	13	-4	7	-5	-36	-47
Australia	10	0	4	-1	-13	-46
Benelux	10	-7	7	-8	-3	-24
Spain	9	-1	6	-5	11	-25
Switzerland	9	-6	3	-6	-16	-37
Ukraine	8	9	1	6	165	-45
Poland	8	4	4	-2	102	85
Netherlands	7	-7	5	-8	-14	-25
Taiwan	7	18	4	10	-47	-7

ALABAMA



\$512M Projected Spend and 296,000 Visits in 2025 (cont.)

	Spending (\$M)	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
Israel	5	13	4	9	0	3
Philippines	5	3	3	3	9	17
Russia	5	10	1	9	-57	-70
Denmark	5	-5	2	-8	-24	-38
Sweden	4	0	3	-3	-45	-52
Mexico	4	-7	9	-8	-19	-7
Ireland	4	-7	3	-6	0	-38
Austria	4	-7	2	-7	-20	-21
Argentina	4	8	3	3	-19	-35
Turkiye	4	5	1	2	101	-26
United Arab Emirates	3	2	1	4	-29	-40
Singapore	3	4	2	4	1	-10
Belgium	3	-8	2	-7	34	-21
South Africa	3	0	1	-2	-14	-33
Czech Republic	3	-7	1	-7	78	10
Portugal	3	-2	1	-4	-9	-31
Egypt	2	-4	1	-4	-67	-50
Norway	2	-5	1	-3	-39	-49
Morocco	2	-4	0	-2	13	-42
Finland	2	-10	1	-6	-34	-45
Hong Kong	2	0	1	2	-45	-36
Hungary	2	2	1	-1	-3	0
Indonesia	2	-5	1	-2	-6	-11
Vietnam	1	5	1	4	-38	50
Thailand	1	0	1	2	-27	-43
Saudi Arabia	1	-1	1	0	-57	-67
Greece	1	-3	1	-5	-23	-14
Malaysia	1	3	0	2	-29	-27
Bulgaria	1	8	0	3	-12	4

ALABAMA

Visitor Spending 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending (\$M)	TOTAL	\$574	\$104	\$130	\$336	\$478	\$527	\$512
	OVERSEAS	\$531	\$94	\$123	\$303	\$428	\$478	\$472
	UK + Ireland	\$74	\$9	\$9	\$58	\$67	\$68	\$65
	DACH Region	\$46	\$6	\$7	\$35	\$46	\$48	\$45
	Canada	\$38	\$8	\$5	\$30	\$46	\$45	\$36
	India	\$22	\$5	\$8	\$19	\$26	\$31	\$33
	China	\$46	\$12	\$8	\$6	\$17	\$33	\$31
	Brazil	\$32	\$6	\$7	\$17	\$22	\$24	\$25
	Japan	\$47	\$8	\$10	\$9	\$21	\$22	\$24
	South Korea	\$24	\$6	\$10	\$10	\$16	\$20	\$20
	France	\$17	\$2	\$2	\$14	\$18	\$19	\$18
	Italy	\$13	\$2	\$2	\$11	\$15	\$17	\$16
	Nordics	\$20	\$3	\$3	\$13	\$14	\$13	\$13
	Australia	\$12	\$2	\$0	\$5	\$8	\$10	\$10
	Benelux	\$11	\$1	\$2	\$8	\$10	\$11	\$10
	Spain	\$8	\$1	\$1	\$8	\$9	\$9	\$9
	Mexico	\$5	\$2	\$2	\$3	\$4	\$4	\$4

ALABAMA

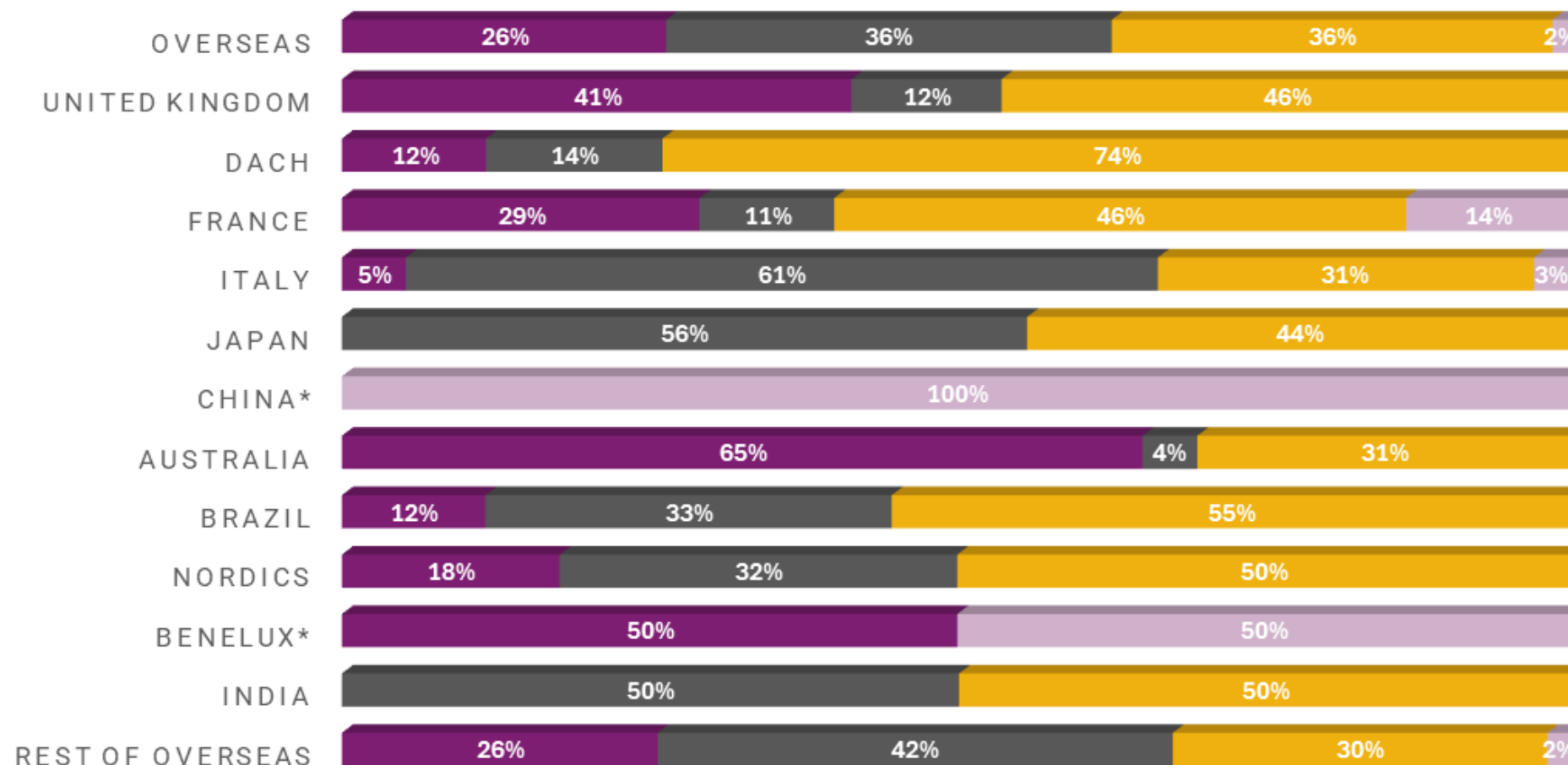
Visits 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)	±
Visits (000s)	TOTAL	400	110	83	221	299	318	296	
	OVERSEAS	320	87	69	167	223	239	233	
	Canada	70	18	9	46	68	69	54	
	UK + Ireland	46	11	7	31	33	33	31	
	DACH Region	28	7	5	18	23	23	22	
	India	11	4	4	10	14	17	17	
	Japan	35	12	6	5	14	16	17	
	France	16	4	2	10	13	13	12	
	China	27	5	1	3	9	13	12	
	Italy	11	2	2	7	10	11	10	
	South Korea	15	5	2	5	9	10	10	
	Mexico	10	4	5	7	8	10	9	
	Brazil	12	3	3	6	7	8	8	
	Nordics	13	3	2	6	7	7	7	
	Benelux	9	3	2	6	7	7	7	
	Spain	8	2	2	6	6	6	6	
	Australia	7	2	0	2	3	4	4	

ALABAMA

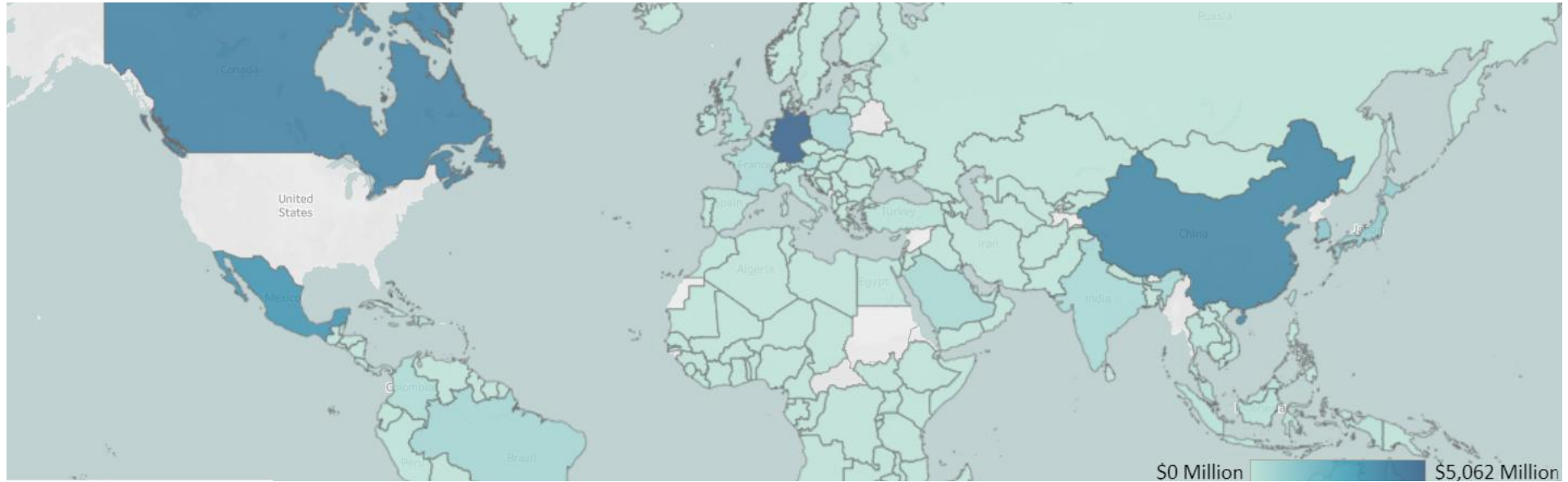
ALABAMA: Purpose of Trip

Leisure Business VFR Other



Source: SIAT, 2022/2023. * indicates small sample size

Exports (Goods)

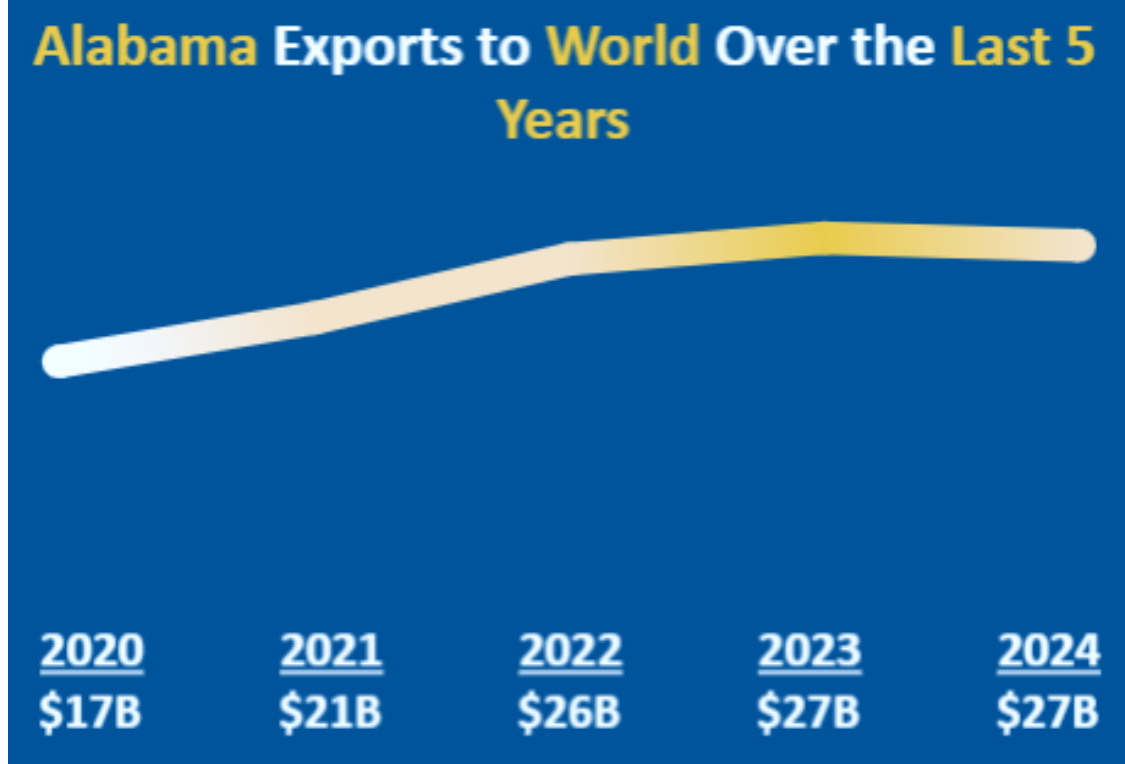


EXPORTS IN GOODS *2024*

\$26.8 Billion

TOP COUNTRIES

CANADA
MEXICO
CHINA
GERMANY
JAPAN
SOUTH KOREA



Goods Exports by Country

(in millions)

Country	2024
Canada	\$4,295
Mexico	\$4,201
China	\$4,137
Germany	\$4,075
Japan	\$880
South Korea	\$782
India	\$653
Brazil	\$569
United Kingdom	\$504
Belgium	\$499
Taiwan	\$371
France	\$367
Indonesia	\$328
Austria	\$308
Netherlands	\$297

EXPORTERS

2,962

Alabama companies exported goods in
2021

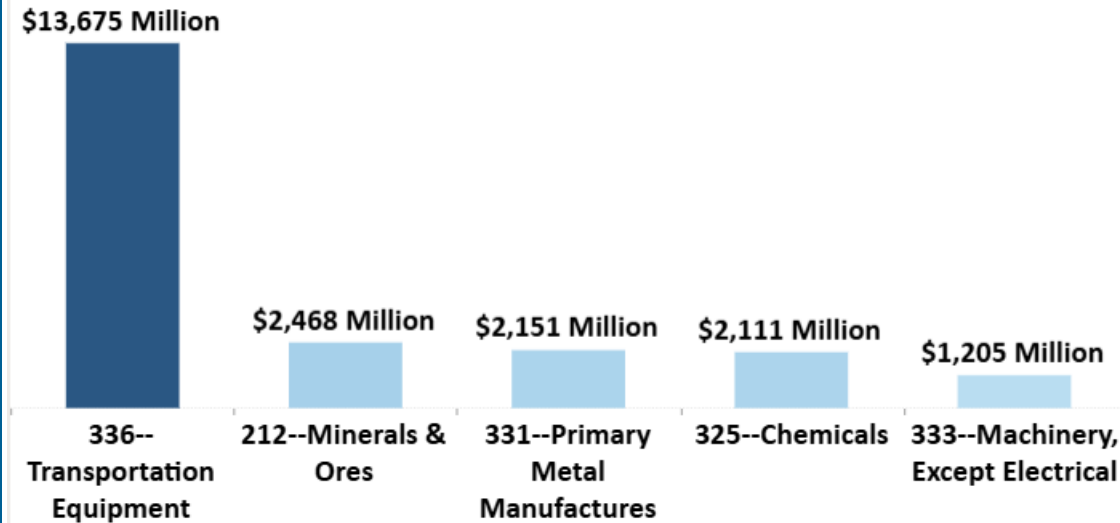
79%

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

* SMEs are businesses that employ fewer than 500 employees.

TOP TRADE SECTORS

Alabama Exports: **World**, Top 5 Products in 2024



International Students

ALABAMA

INTERNATIONAL
STUDENTS
2022/23

10,071

STUDENT-VISIT
RATIO

2.9%

INDEXED
STUDENT-VISIT
RATIO
U.S. = 100

272

ALABAMA

INTERNATIONAL STUDENTS, 2023/24



10,071

International Students



24

Rank in the United States*



11.6

% Change from
Previous Year



\$348,580,779

Estimated International
Student Expenditure**

LEADING PLACES OF ORIGIN

Place of Origin	% Total
India	36.3
China	13.2
Nigeria	5.1
Bangladesh	4.7
Nepal	2.4

LEADING INSTITUTIONS

Institution	Total
University of Alabama - Birmingham	2,244
Auburn University - Auburn	1,782
University of Alabama - Tuscaloosa	1,273
Auburn University - Montgomery	1,211
University of North Alabama	1,128

Visitor Perception

MARKET PROFILES

TRAVEL·SOUTH  USA

- 
- ☐ CANADA
 - ☐ GERMANY
 - ☐ UNITED KINGDOM
 - ☐ INDIA
 - ☐ BRAZIL

CANADA



POPULATION
2024

40M

REAL GDP
GROWTH
2025 PROJECTION

2.4%

CURRENCY
RATE
CANADIAN
DOLLAR
2024

1.37

INFLATION
RATE
2025 PROJECTION

1.9%

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

5.5%

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

28.0%

CANADA

44%

Likelihood to Visit Travel South
in the next Five Years

Note: Canadian visitors who are Likely to Travel Internationally

Most Important Content For Destination Decisions:



- 40% Safety
- 36% Hotels and lodging
- 36% Restaurants and food
- 28% Availability of direct flight service
- 28% Beaches
- 25% Historical attractions
- 23% Shopping
- 22% Entertainment, events, shows
- 22% Opportunities for relaxation
- 20% Transportation and how to get around
- 20% Family fun
- 19% Museums and culture
- 18% Sightseeing tours
- 18% Important or iconic attractions
- 17% National Parks
- 16% Ways to experience nature
- 15% Theme parks
- 14% Level of crowds
- 13% Outdoor activities (biking, boating, hiking, etc.)
- 11% Professional sporting events
- 11% Things to do outside the large cities
- 9% Touristy attractions to avoid
- 8% Off-the-beaten path attractions
- 7% Ideas for adventurous travel
- 6% Recommendations from residents
- 6% Sample trip itineraries
- 5% Ways to experience the American lifestyle
- 4% Commitment to being an eco-friendly/sustainable place
- 2% Snow/winter activities (skiing, sledding, etc.)

Source: Future Partners (2025)

CANADA

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: Canadian visitors who are Likely to Travel Internationally

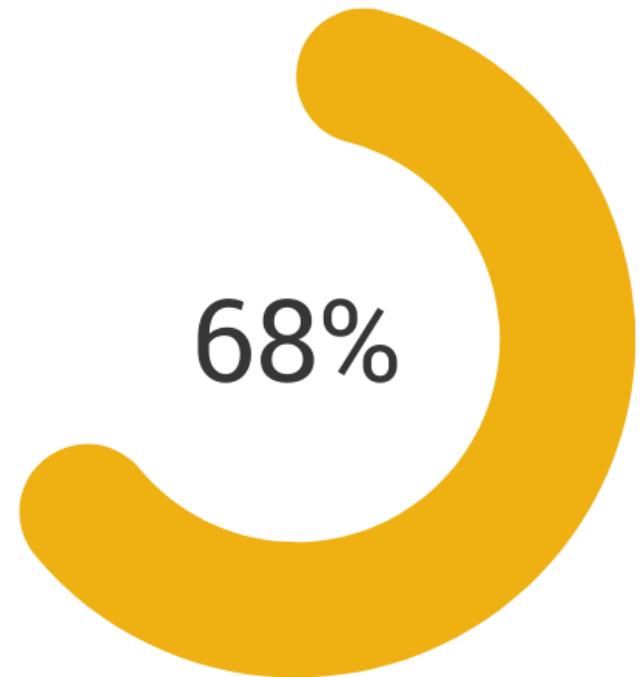
Source: Future Partners (2025)

CANADA



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



1 Trip

30%

2 Trips

25%

3-4 Trips

26%

5+ Trips

19%

3.2

Average Number of Leisure International Trips

Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

CANADA



1+ Trips

26%

1 Trip

17%

2 Trips

5%

3+ Trips

5%

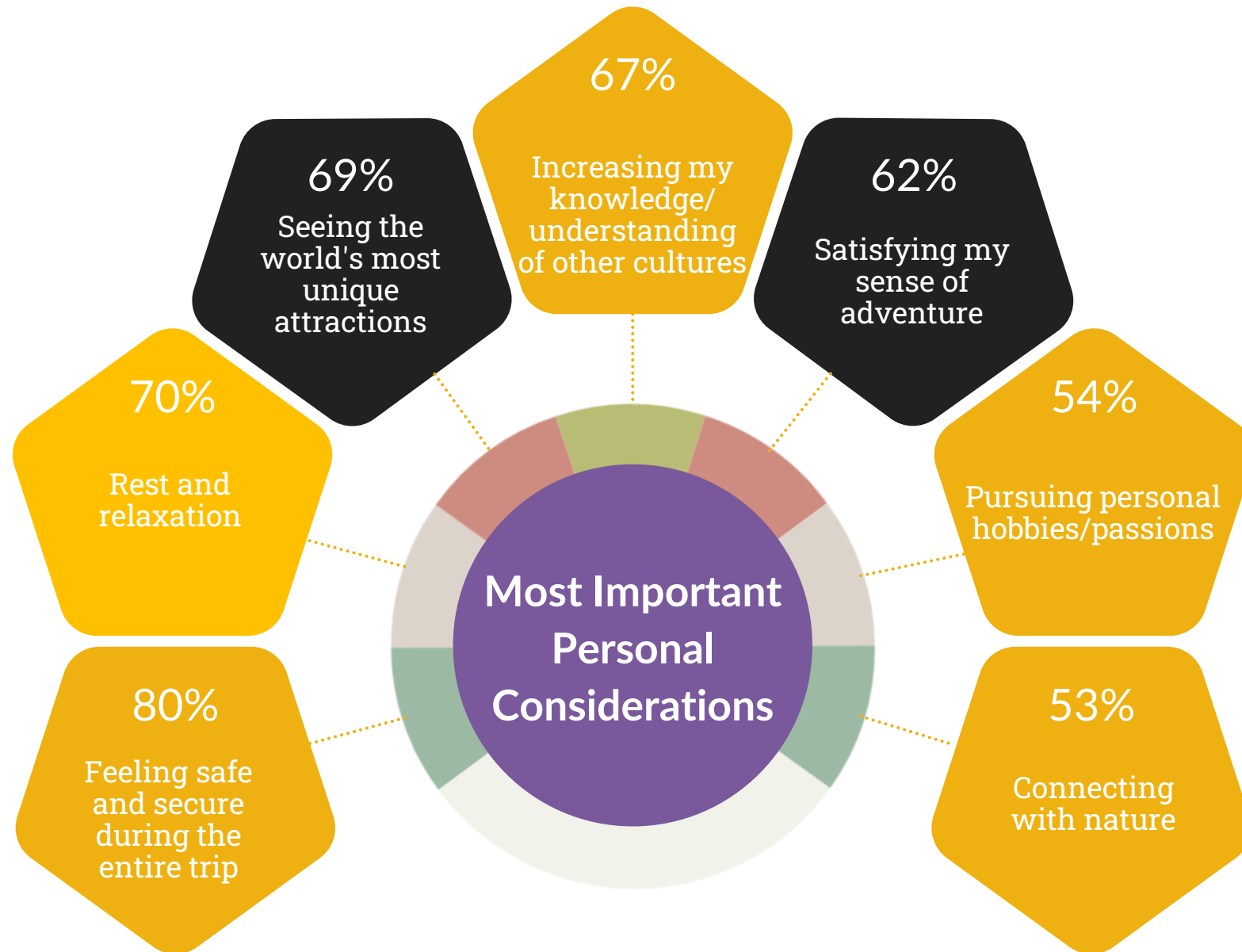
0.5

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

Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

CANADA



Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

CANADA

Most Important When Choosing a Destination

- 83%** Accommodation options
- 81%** Climate or weather at the destination
- 73%** Appeal of local culture
- 71%** Landmarks and sightseeing options
- 71%** Ease of travel to the destination
- 68%** Natural features/landscapes
- 67%** Beaches/coastal activities
- 64%** Leisure attractions

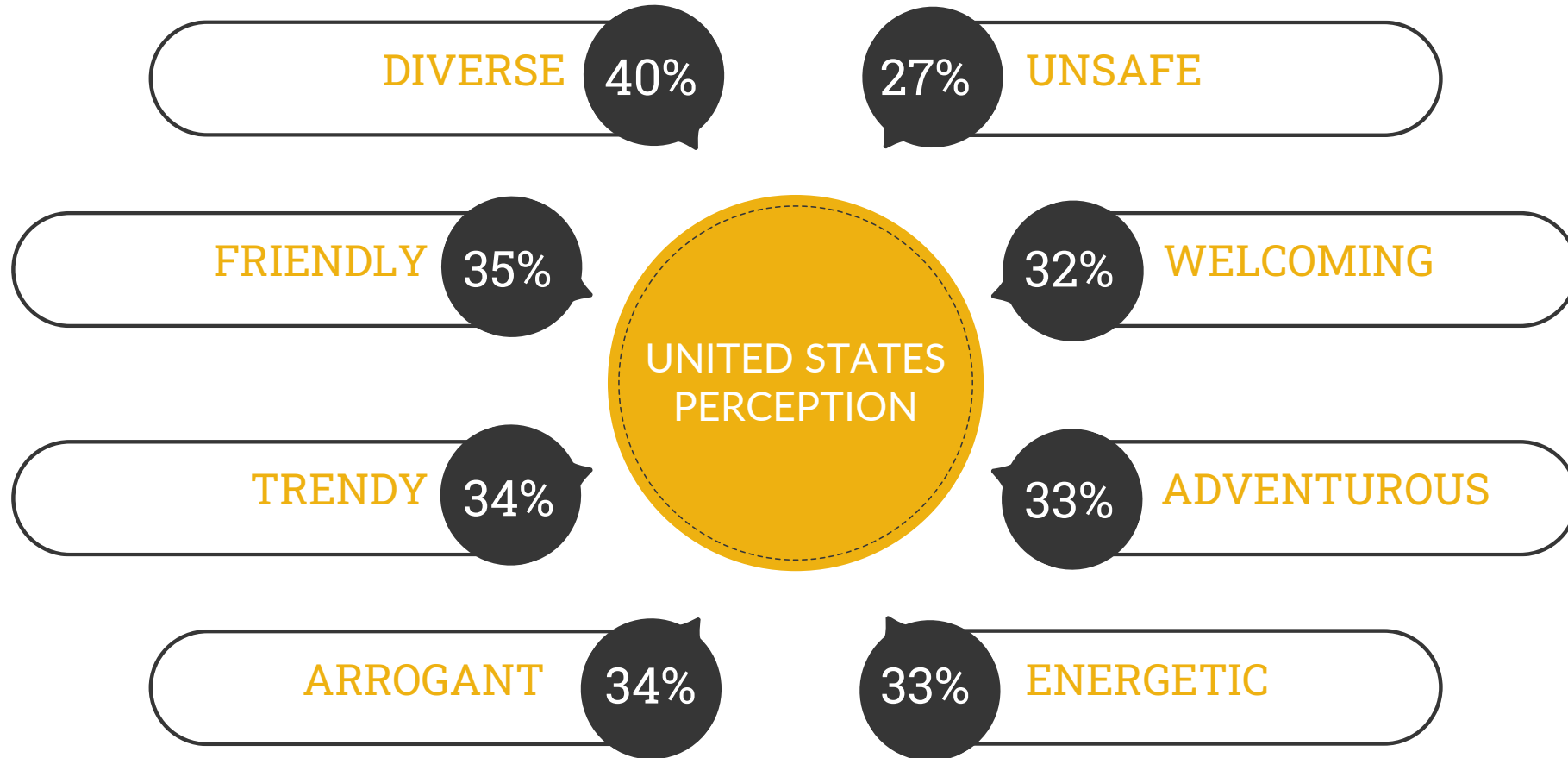
Most Discouraging From Visiting a Destination

- 61%** Uncleanliness in the destination
- 56%** High prices
- 56%** Personal safety concerns
- 44%** Lack of information for planning trip & at destination
- 41%** Crowdedness
- 40%** Inconvenience of travel to the destination
- 35%** Political climate not aligning with personal views
- 27%** Visa requirements/entry procedures

Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

CANADA



Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

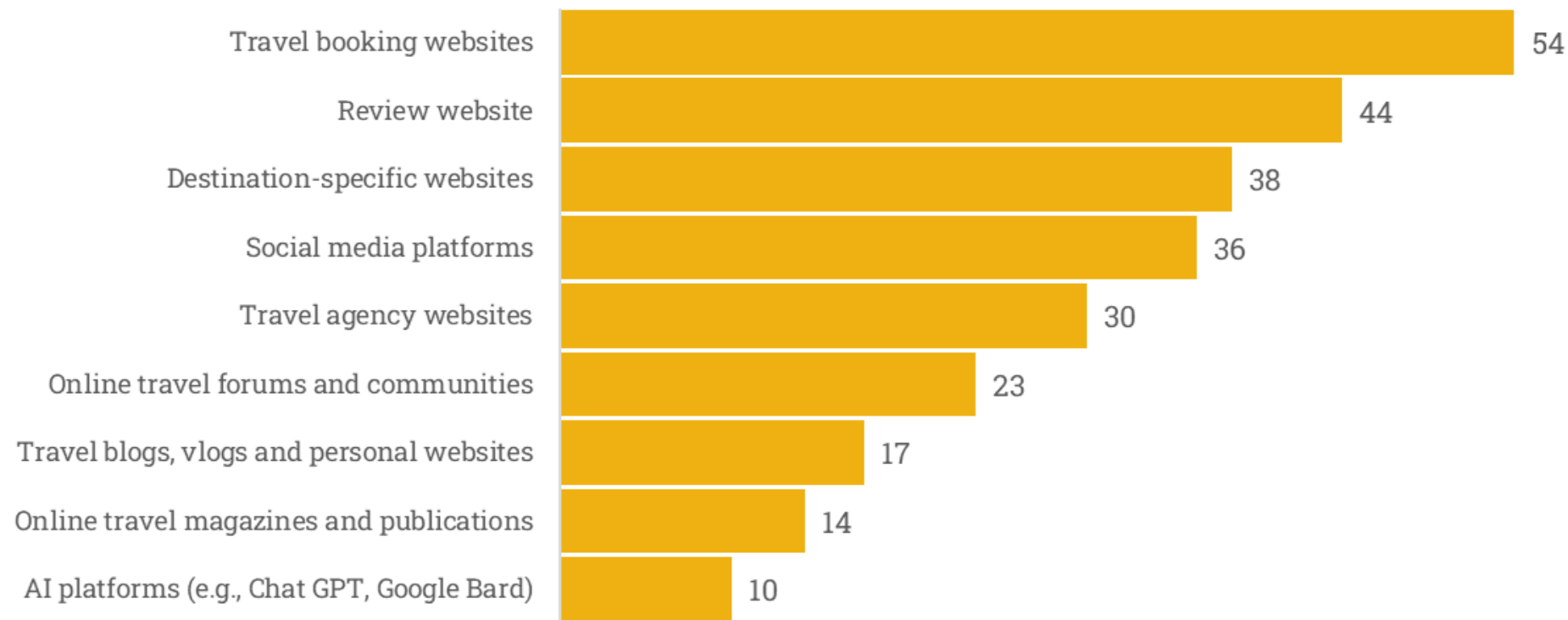
Sources of Information for Destination Selection (%)



Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Social Media Participation

YouTube	70%
Instagram	69%
Facebook/META	68%
Tik Tok	43%
LinkedIn	36%
Twitter/X	34%
Pinterest	30%
Snapchat	30%
Reddit	18 %
Tumblr	3 %

Note: Canadian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

CANADA

Likelihood of how 2025 will evolve:

Percentages show the total of “Strongly Agree” + “Agree”

52%

If a U.S. destination has a problem with over-tourism, travelers are less likely to visit

45%

Global wars/strife will impact the destinations visited in 2025

40%

Travelers are likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination)

33%

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

30%

Luxury travel experiences are an important part of leisure trips

GERMANY



POPULATION <i>2024</i>	REAL GDP GROWTH <i>2025 PROJECTION</i>	CURRENCY RATE EURO 2024	INFLATION RATE <i>2025 PROJECTION</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. GOODS & SERVICES EXPORTS</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. SERVICES EXPORTS</i>
85M	0.8%	0.92	2.0%	6.3%	17.9%

GERMANY

41%

Likelihood to Visit Travel South
in the next Five Years

Note: German visitors who are Likely to Travel Internationally

Most Important Content For Destination Decisions:



- 38% Hotels and lodging
- 36% Safety
- 33% Beaches
- 30% National Parks
- 30% Historical attractions
- 29% Important or iconic attractions
- 29% Restaurants and food
- 22% Opportunities for relaxation
- 22% Availability of direct flight service
- 21% Ways to experience nature
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- 9% Ideas for adventurous travel
- 7% Level of crowds
- 6% Professional sporting events
- 6% Sample trip itineraries
- 6% Commitment to being an eco-friendly/sustainable place
- 4% Snow/winter activities (skiing, sledding, etc.)

Source: Future Partners (2025)

GERMANY

Recall of “Buzz”: Travel South
Destinations

24%

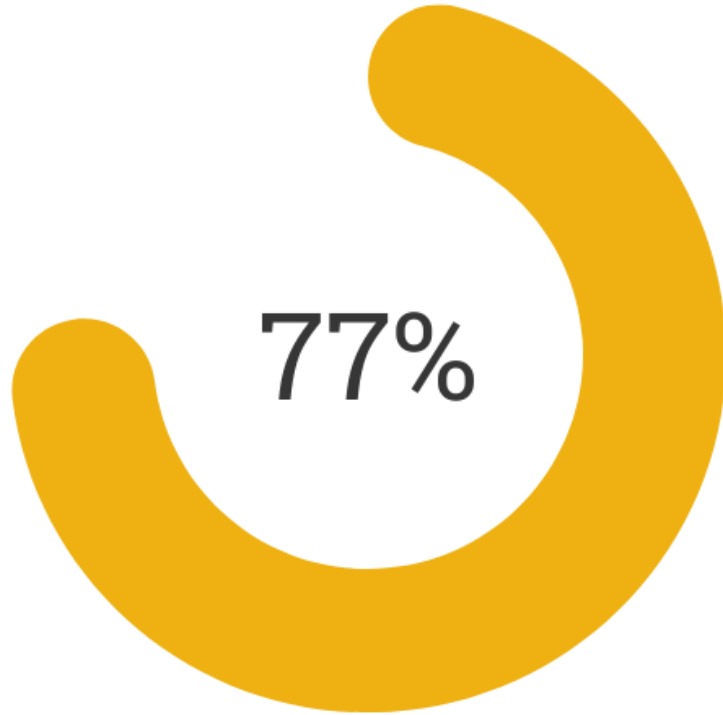
Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.



Note: German visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

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



4.0

Average Number of Leisure
International Trips

1 Trip

19%

2 Trips

28%

3-4 Trips

30%

5+ Trips

23%

Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

GERMANY



1.1

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

1+ Trips

34%

1 Trip

17%

2 Trips

8%

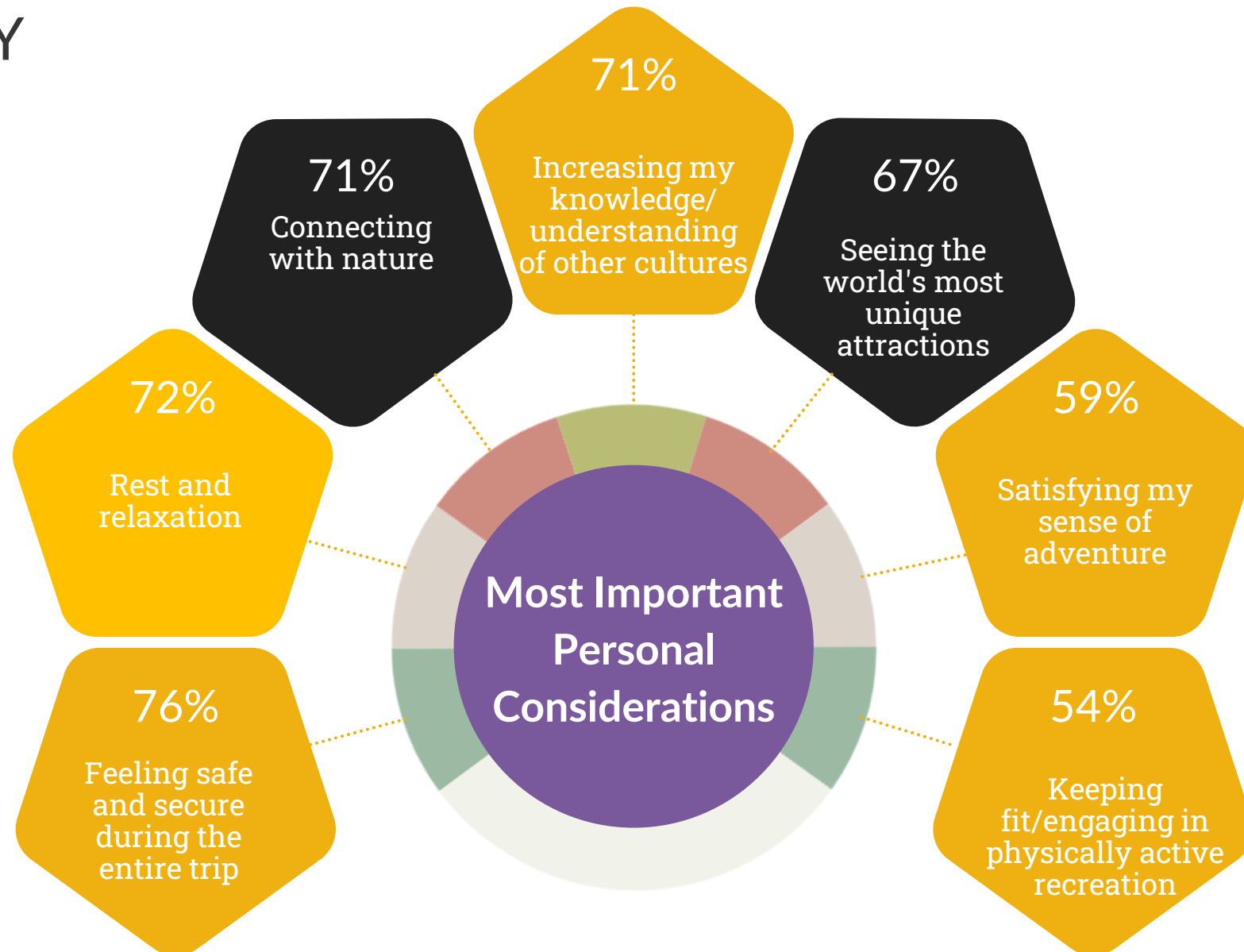
3+ Trips

10%

Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

GERMANY



Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

GERMANY

Most Important When Choosing a Destination

- 75%** Climate or weather at the destination
- 74%** Landmarks and sightseeing options
- 73%** Accommodation options
- 73%** Natural features/landscapes
- 72%** Beaches/coastal activities
- 68%** Appeal of local culture
- 68%** Leisure attractions
- 65%** Ease of travel to the destination

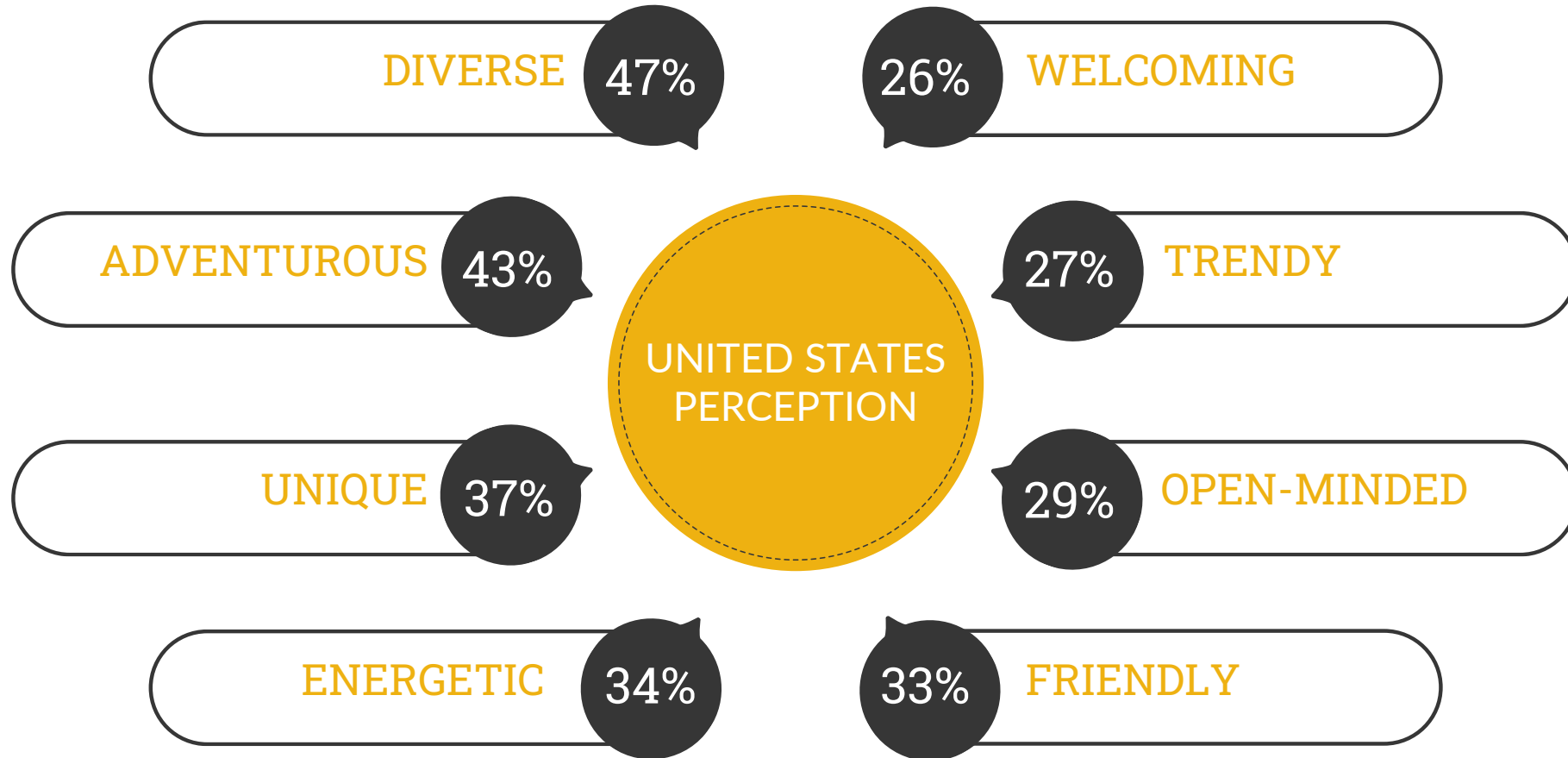
Most Discouraging From Visiting a Destination

- 48%** Personal safety concerns
- 46%** Uncleanliness in the destination
- 42%** Crowdedness
- 38%** High prices
- 38%** Political climate not aligning with personal views
- 31%** Lack of environmental responsibilities
- 30%** Lack of information for planning trip & at destination
- 25%** Inconvenience of travel to the destination

Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

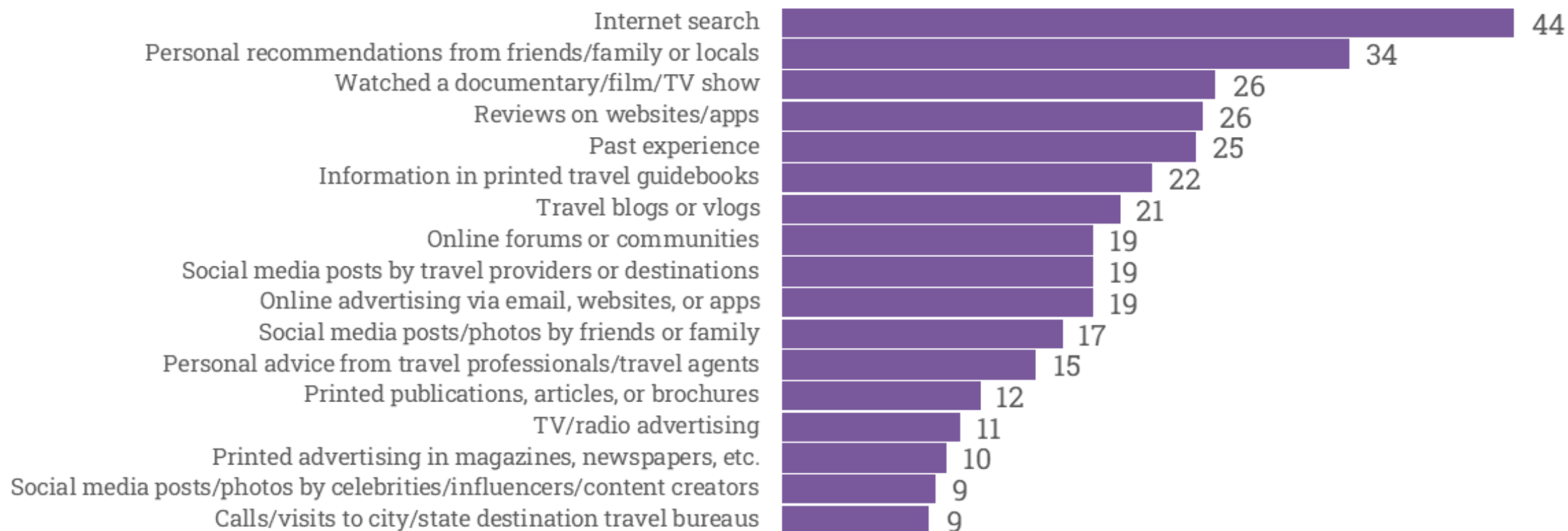
GERMANY



Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

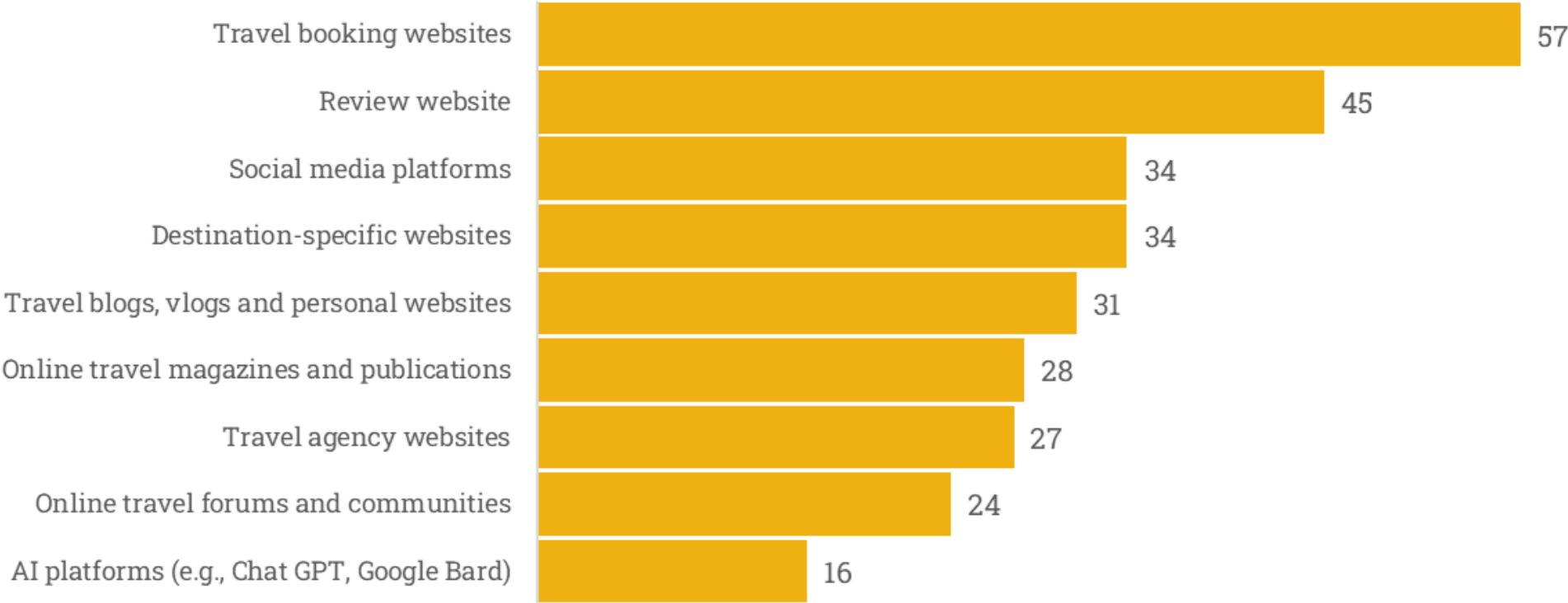
Sources of Information for Destination Selection (%)



Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Social Media Participation

YouTube	78%
Instagram	69%
Facebook/META	56%
Tik Tok	52%
Twitter/X	32%
Snapchat	31%
Pinterest	29%
LinkedIn	24%
Reddit	14%
Xing	14%
Tumblr	6 %

Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

GERMANY

Likelihood of how 2025 will evolve:

Percentages show the total of “Strongly Agree” + “Agree”

45%

If a U.S. destination has a problem with over-tourism, travelers are less likely to visit

42%

Global wars/strife will impact the destinations visited in 2025

29%

Travelers are more proactive in reducing the impact of their travel on the environment

29%

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

28%

Luxury travel experiences are an important part of leisure trips

UNITED KINGDOM



POPULATION
2024

69M

REAL GDP
GROWTH
2025 PROJECTION

1.5%

CURRENCY
RATE
BRITISH POUND
2024

0.78

INFLATION
RATE
2025 PROJECTION

2.1%

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

8.4%

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

15.4%

UNITED KINGDOM

49%

Likelihood to Visit Travel South
in the next Five Years

Note: United Kingdom visitors who are Likely to Travel Internationally

Most Important Content For Destination Decisions:



- 34% Hotels and lodging
- 32% Restaurants and food
- 28% Safety
- 27% Availability of direct flight service
- 25% Sightseeing tours
- 24% Important or iconic attractions
- 24% Historical attractions
- 22% National Parks
- 21% Entertainment, events, shows
- 21% Opportunities for relaxation
- 21% Transportation and how to get around
- 21% Shopping
- 20% Beaches
- 19% Museums and culture
- 18% Family fun
- 18% Ways to experience nature
- 16% Theme parks
- 13% Ways to experience the American lifestyle
- 12% Things to do outside the large cities
- 12% Ideas for adventurous travel
- 12% Level of crowds
- 10% Touristy attractions to avoid
- 9% Outdoor activities (biking, boating, hiking, etc.)
- 8% Recommendations from residents
- 8% Sample trip itineraries
- 8% Professional sporting events
- 8% Off-the-beaten path attractions
- 6% Commitment to being an eco-friendly/sustainable place
- 4% Snow/winter activities (skiing, sledding, etc.)

Source: Future Partners (2025)

UNITED KINGDOM

Recall of “Buzz”: Travel South
Destinations

27%

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 (2025)

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



4.0

Average Number of
International Trips

1 Trip

25%

2 Trips

23%

3-4 Trips

30%

5+ Trips

23%

Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

UNITED KINGDOM



1+ Trip

30%

1 Trip

15%

2 Trips

10%

3+ Trips

5%

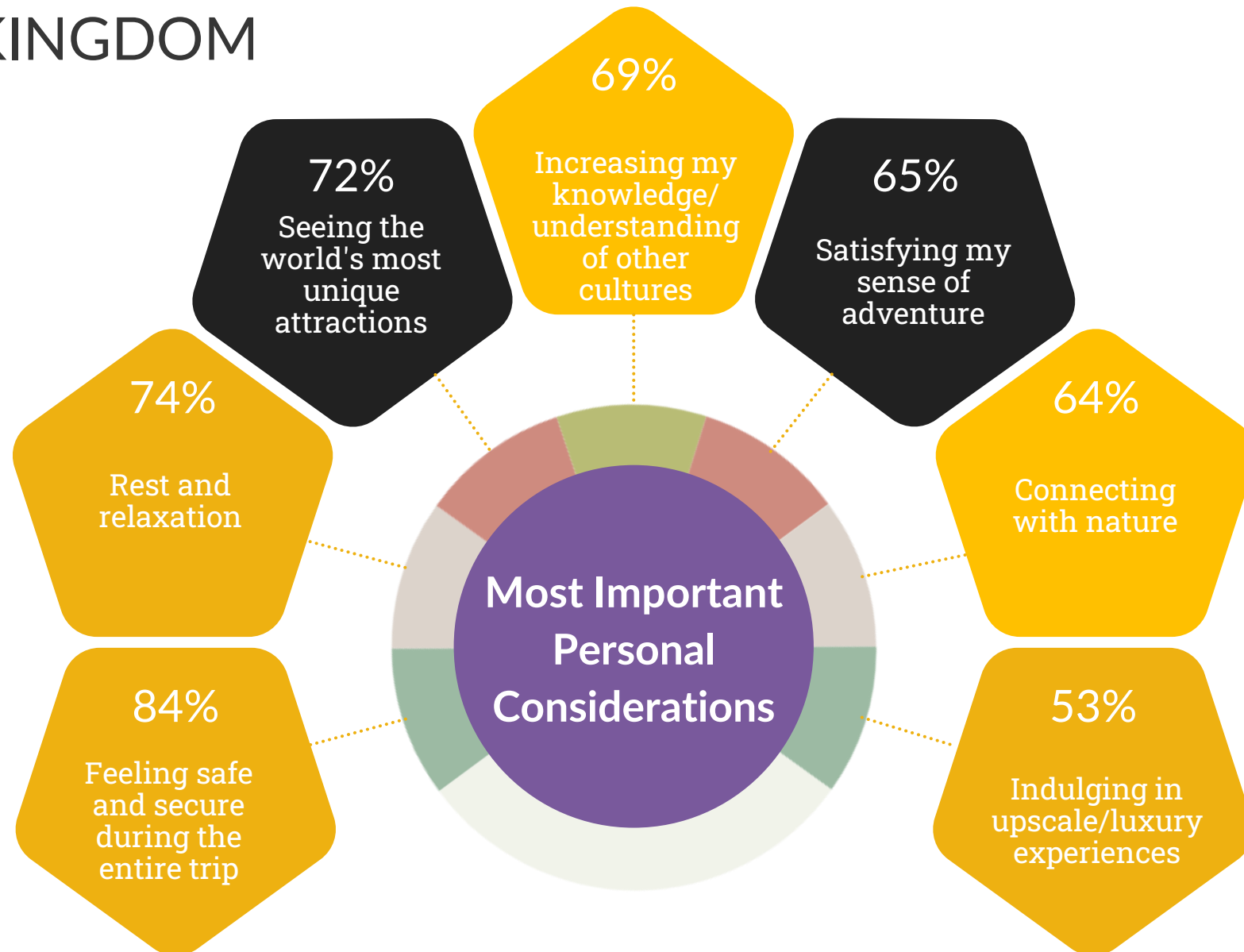
0.7

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

Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

UNITED KINGDOM



Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

UNITED KINGDOM

Most Important When Choosing a Destination

- 80%** Accommodation options
- 78%** Appeal of local culture
- 77%** Climate or weather at the destination
- 74%** Natural features/landscapes
- 73%** Landmarks and sightseeing options
- 70%** Ease of travel to the destination
- 63%** Leisure attractions
- 57%** Ease of communication with locals at the destination

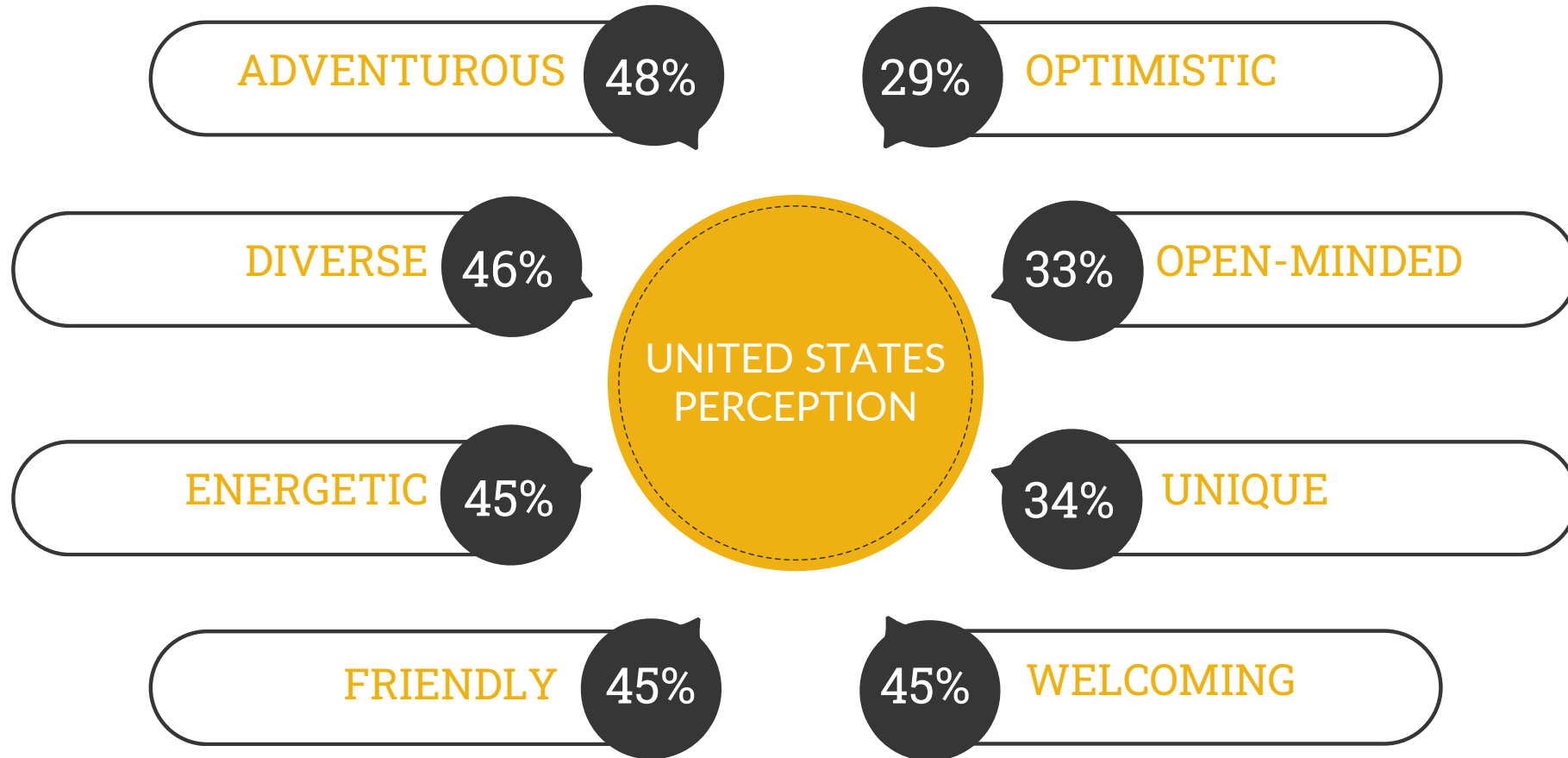
Most Discouraging From Visiting a Destination

- 59%** Uncleanliness in the destination
- 56%** Personal safety concerns
- 47%** High prices
- 39%** Lack of information for planning trip & at destination
- 36%** Crowdedness
- 30%** Political climate not aligning with personal views
- 30%** Inconvenience of travel to the destination
- 29%** Lack of environmental responsibilities

Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

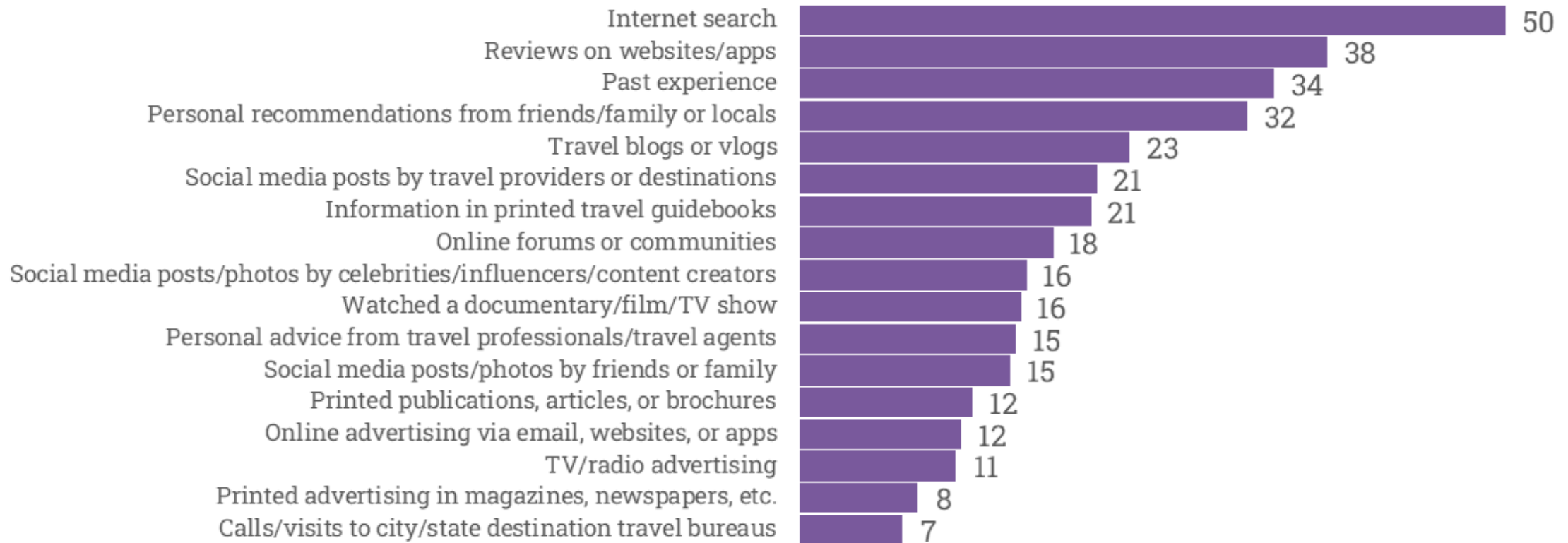
UNITED KINGDOM



Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

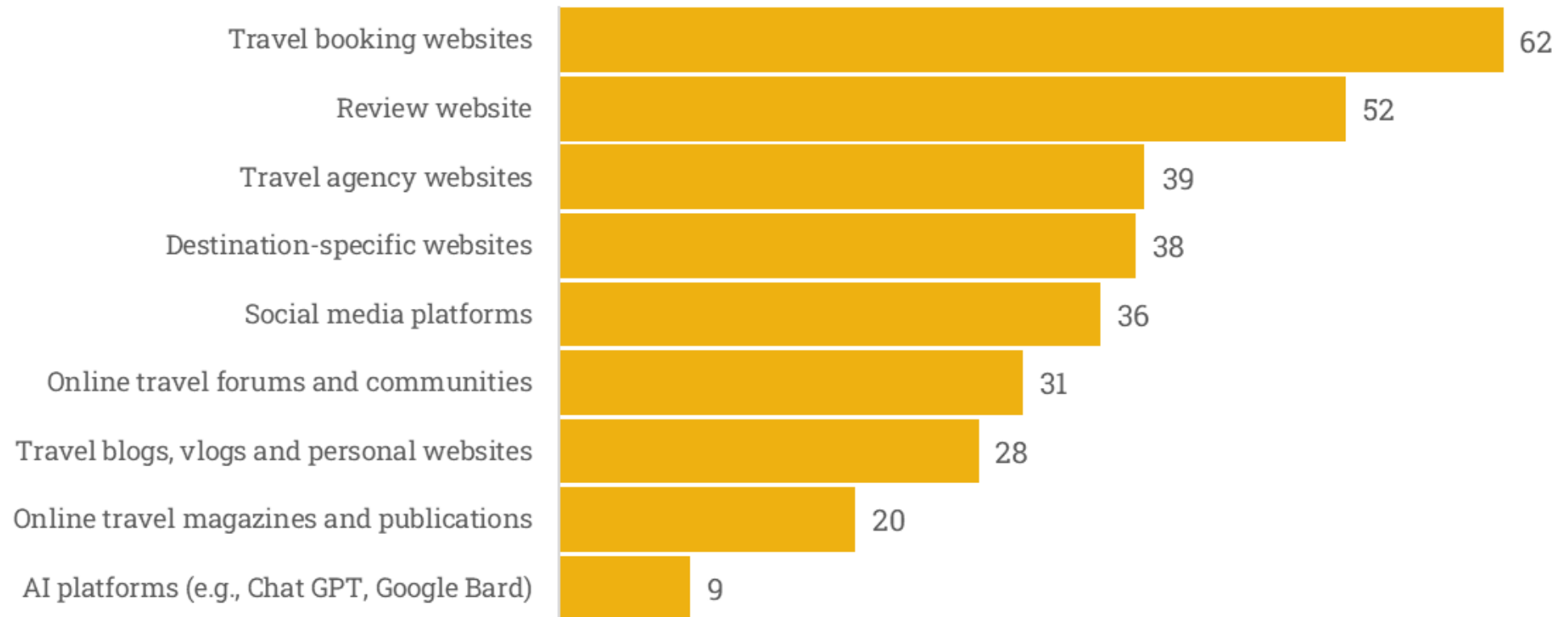
Sources of Information for Destination Selection (%)



Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

UNITED KINGDOM



Social Media Participation

YouTube	71%
Facebook/META	66%
Instagram	62%
Twitter/X	48%
Tik Tok	46%
LinkedIn	41%
Snapchat	31%
Pinterest	26%
Reddit	15%
Tumblr	2 %

Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

UNITED KINGDOM

Likelihood of how 2025 will evolve:

Percentages show the total of “Strongly Agree” + “Agree”

49%

If a U.S. destination has a problem with over-tourism, travelers are less likely to visit

47%

Luxury travel experiences are an important part of leisure trips

47%

Global wars/strife will impact the destinations visited in 2025

38%

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

38%

Travelers are likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination)

INDIA



POPULATION
2024

1.4B

REAL GDP
GROWTH
2025 PROJECTION

6.5%

CURRENCY
RATE
INDIAN RUPEE
2024

83.68

INFLATION
RATE
2025 PROJECTION

4.1%

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

85%

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:



- 29% Restaurants and food
- 28% Shopping
- 27% Safety
- 27% Beaches
- 26% Entertainment, events, shows
- 24% Ways to experience nature
- 22% Historical attractions
- 22% Family fun
- 21% Hotels and lodging
- 21% Opportunities for relaxation
- 20% Ways to experience the American lifestyle
- 20% Sightseeing tours
- 19% Important or iconic attractions
- 19% Museums and culture
- 17% National Parks
- 17% Availability of direct flight service
- 16% Ideas for adventurous travel
- 15% Theme parks
- 14% Outdoor activities (biking, boating, hiking, etc.)
- 14% Things to do outside the large cities
- 13% Snow/winter activities (skiing, sledding, etc.)
- 12% Commitment to being an eco-friendly/sustainable place
- 11% Transportation and how to get around
- 10% Professional sporting events
- 9% Touristy attractions to avoid
- 8% Recommendations from residents
- 7% Off-the-beaten path attractions
- 7% Level of crowds
- 6% Sample trip itineraries

Source: Future Partners (2025)

INDIA

Recall of “Buzz”: Travel South
Destinations

71%

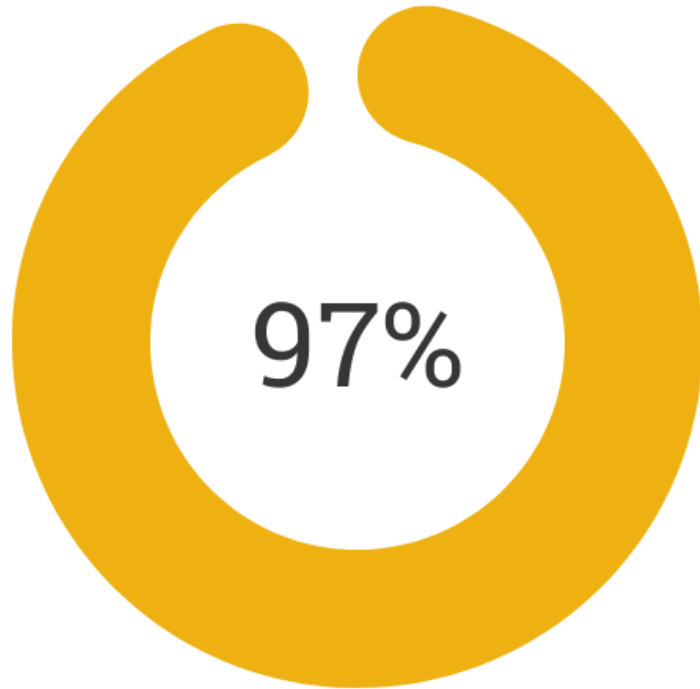
Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.



Note: Indian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

INDIA



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



1 Trip

50%

2 Trips

21%

3-4 Trips

14%

5+ Trips

15%

3.0

Average Number of Leisure International Trips

Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

INDIA



1+ Trips

72%

1 Trip

40%

2 Trips

12%

3+ Trips

21%

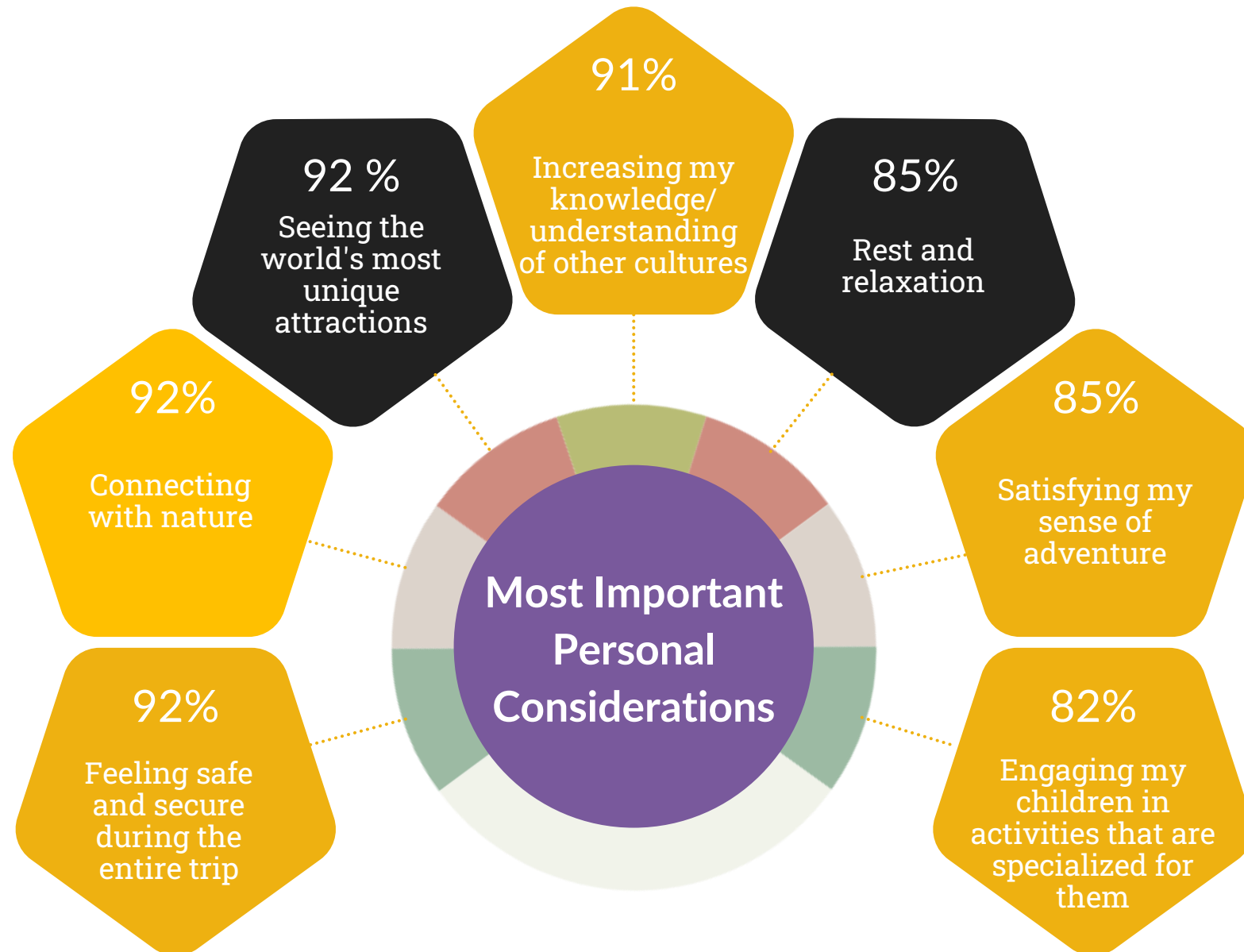
2.5

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

Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

INDIA



Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

INDIA

Most Important When Choosing a Destination

- 91 %** Climate or weather at the destination
- 89%** Natural features/landscapes
- 89%** Accommodation options
- 89%** Landmarks and sightseeing options
- 88%** Ease of travel to the destination
- 88%** Leisure attractions
- 88%** Appeal of local culture
- 87%** Beaches/coastal activities

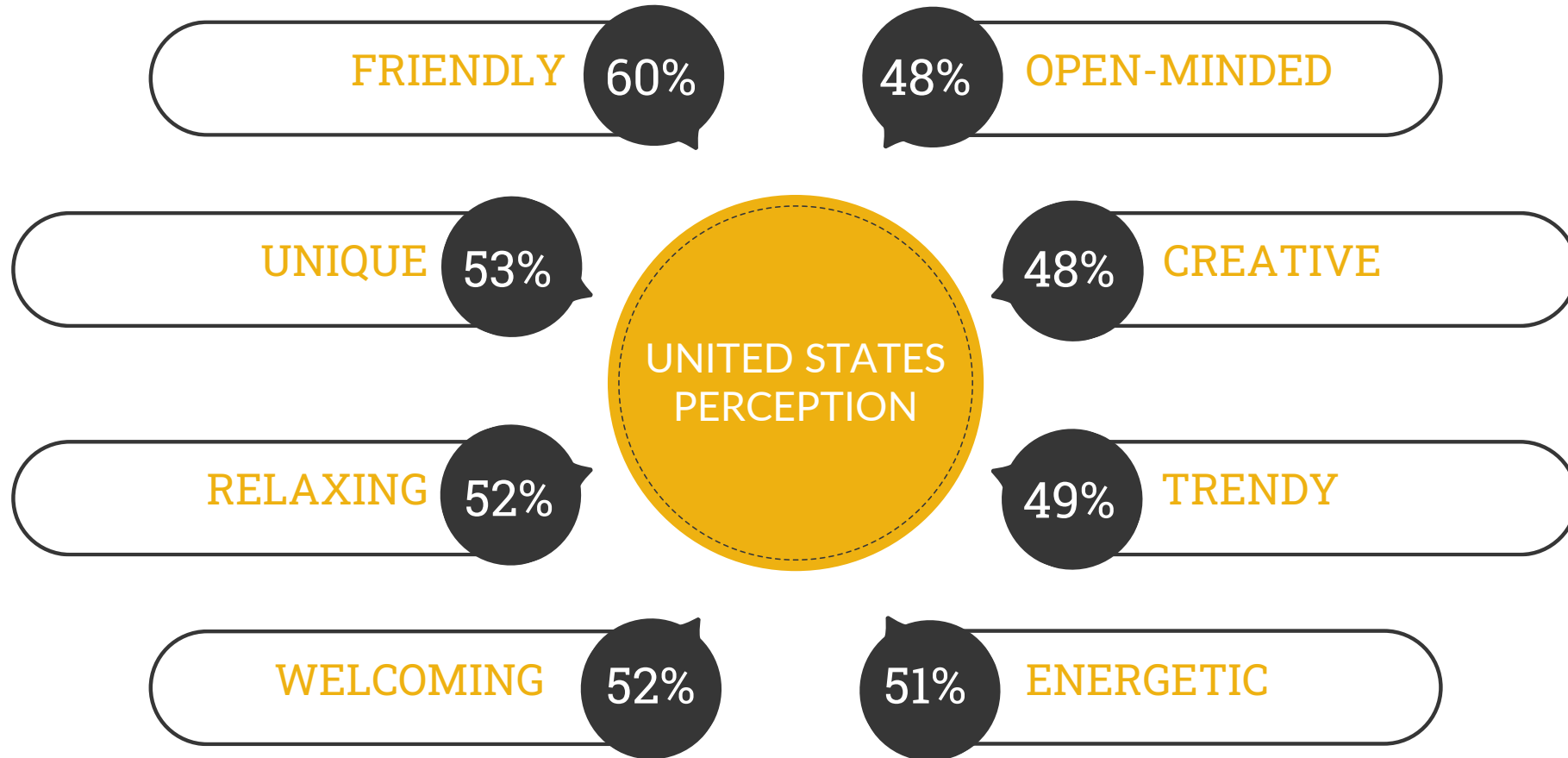
Most Discouraging From Visiting a Destination

- 63%** Uncleanliness in the destination
- 55%** Personal safety concerns
- 52%** Inconvenience of travel to the destination
- 51 %** Lack of environmental responsibilities
- 48%** Lack of information for planning trip & at destination
- 46%** High prices
- 44%** Visa requirements/entry procedures
- 43%** Political climate not aligning with personal views

Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

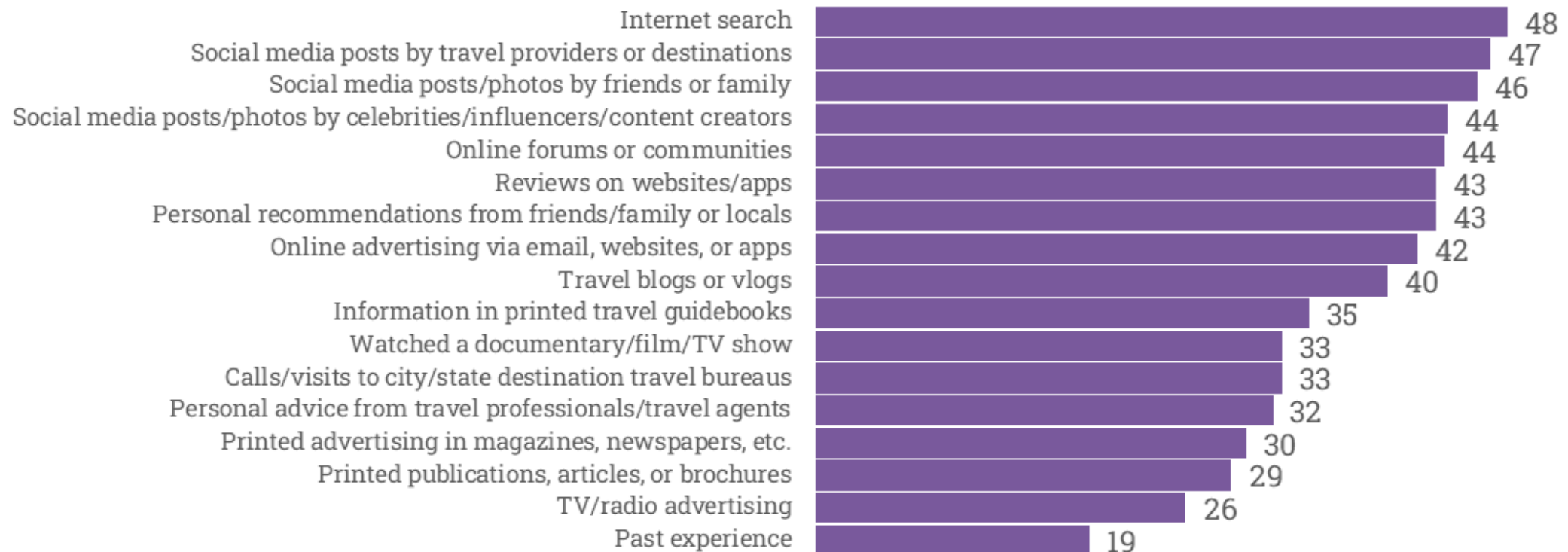
INDIA



Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

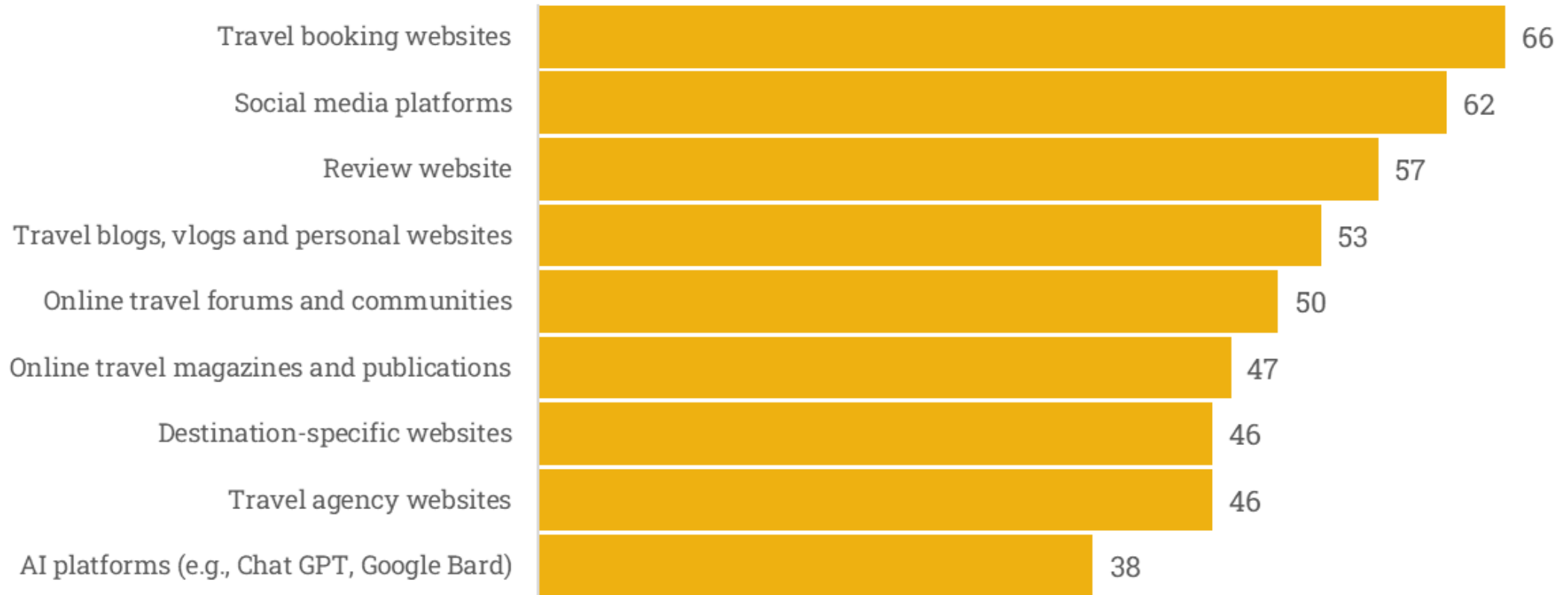
Sources of Information for Destination Selection (%)



Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Social Media Participation

YouTube	96%
Instagram	94%
Facebook/META	89%
Twitter/X	73%
Snapchat	68%
LinkedIn	65%
Pinterest	58%
Reddit	31%
Tumblr	12%

Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

INDIA

Likelihood of how 2025 will evolve:

Percentages show the total of “Strongly Agree” + “Agree”

73%

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

73%

Luxury travel experiences are an important part of leisure trips

72%

Travelers are more proactive in reducing the impact of their travel on the environment

70%

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

69%

Global wars/strife will impact the destinations visited in 2025

BRAZIL



POPULATION <i>2024</i>	REAL GDP GROWTH <i>2025 PROJECTION</i>	CURRENCY RATE BRAZILIAN REAL 2024	INFLATION RATE <i>2025 PROJECTION</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. GOODS & SERVICES EXPORTS</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. SERVICES EXPORTS</i>
212M	2.2%	5.39	3.6%	12.0%	33.1%

BRAZIL

61%

Likelihood to Visit Travel South
in the next Five Years

Note: Brazilian visitors who are Likely to Travel Internationally

Most Important Content For Destination Decisions:



40.9%	Hotels and lodging
38.3%	Shopping
34.0%	Restaurants and food
33.0%	Sightseeing tours
32.5%	Family fun
28.1%	Theme parks
26.3%	Safety
19.6%	Beaches
18.8%	Entertainment, events, shows
18.4%	Historical attractions
17.8%	Museums and culture
17.3%	National Parks
17.0%	Opportunities for relaxation
16.8%	Transportation and how to get around
15.5%	Availability of direct flight service
13.9%	Important or iconic attractions
10.9%	Snow/winter activities
10.0%	Ideas for adventurous travel
9.8%	Touristy attractions to avoid
8.9%	Ways to experience the American lifestyle
8.6%	Off-the-beaten path attractions
8.4%	Outdoor activities (biking, hiking, etc.)
8.4%	Professional sporting events
8.4%	Commitment to being eco-friendly
8.3%	Sample trip itineraries
8.3%	Recommendations from local residents
8.1%	Ways to experience nature
7.4%	Things to do outside the large cities
6.9%	Level of crowds

Source: Future Partners (2025)

BRAZIL

Recall of “Buzz”: Travel South
Destinations

38%

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



Note: Brazilian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

BRAZIL



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

BRAZIL



1 Trip

38%

2 Trips

32%

3-4 Trips

16%

5+ Trips

14%

2.8

Average Number of Leisure International Trips

Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

BRAZIL



1.5

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

1+ Trips

53%

1 Trip

21%

2 Trips

13%

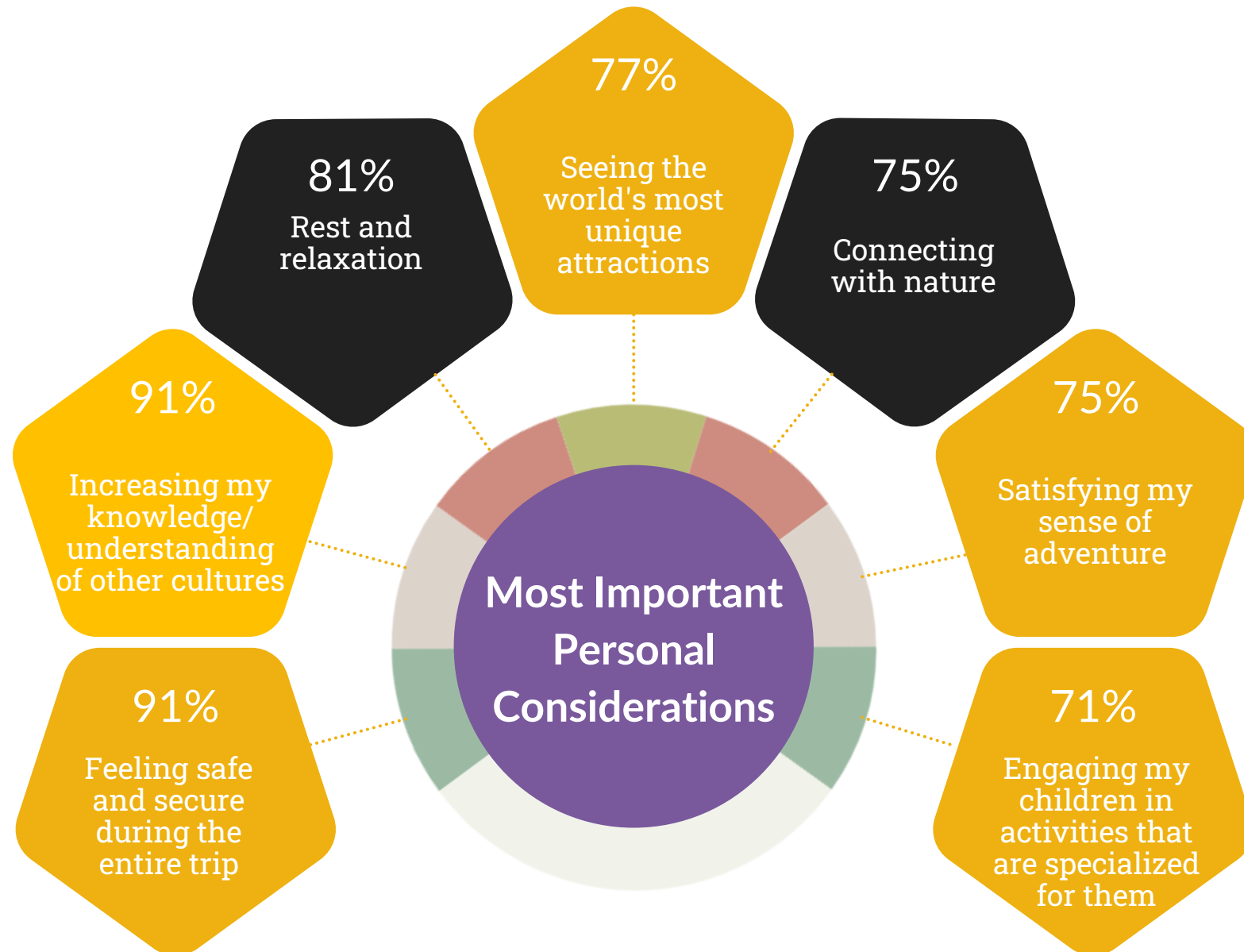
3+ Trips

20%

Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

BRAZIL



Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

BRAZIL

Most Important When Choosing a Destination

- 90%** Landmarks and sightseeing options
- 90%** Accommodation options
- 88%** Leisure attractions
- 88%** Ease of travel to the destination
- 86%** Appeal of local culture
- 85%** Climate or weather at the destination
- 81%** Health and wellness offerings at the destination
- 80%** Natural features/landscapes

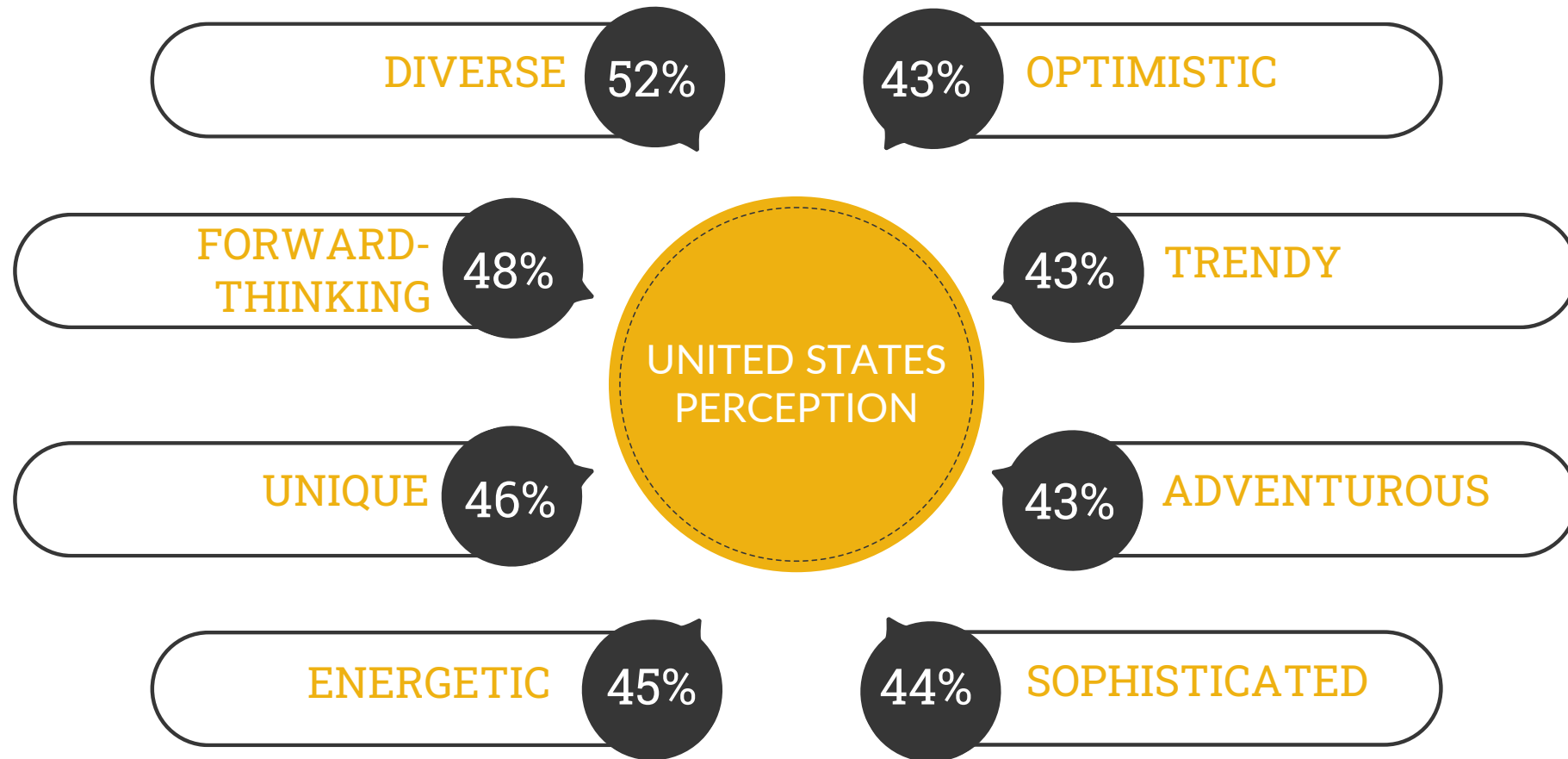
Most Discouraging From Visiting a Destination

- 57%** Personal safety concerns
- 56%** Uncleanliness in the destination
- 52%** High prices
- 47%** Lack of information for planning trip & at destination
- 47%** Lack of environmental responsibilities
- 34%** Crowdedness
- 31%** Inconvenience of travel to the destination
- 30%** Political climate not aligning with personal views

Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

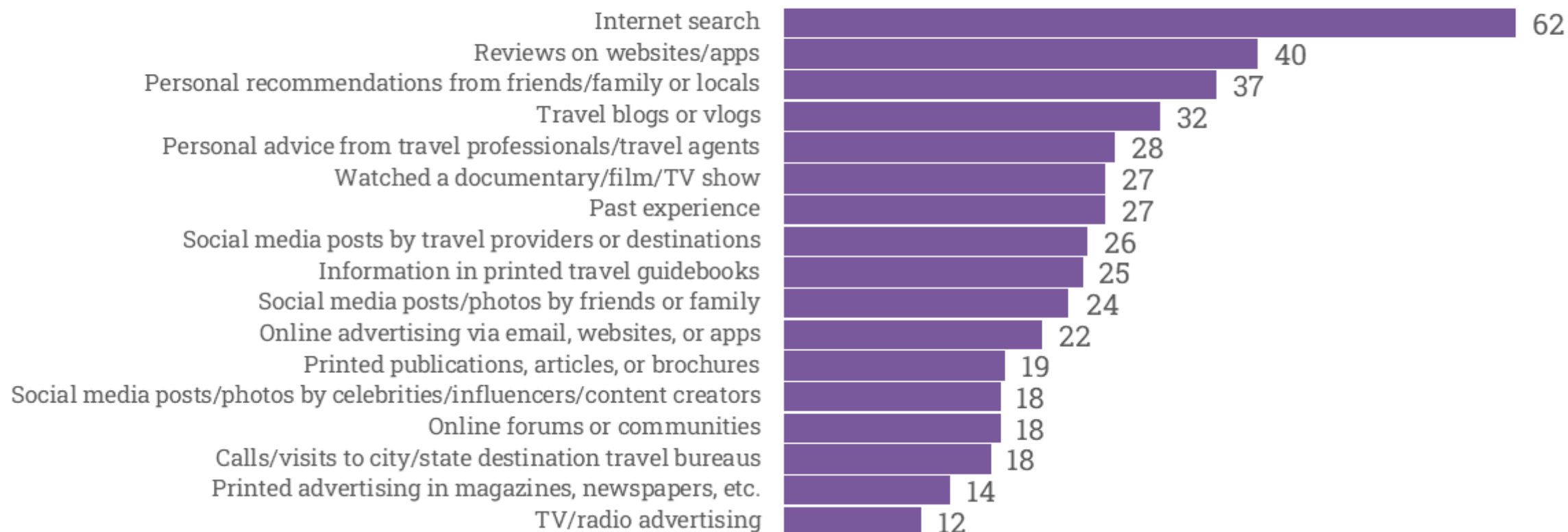
BRAZIL



Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

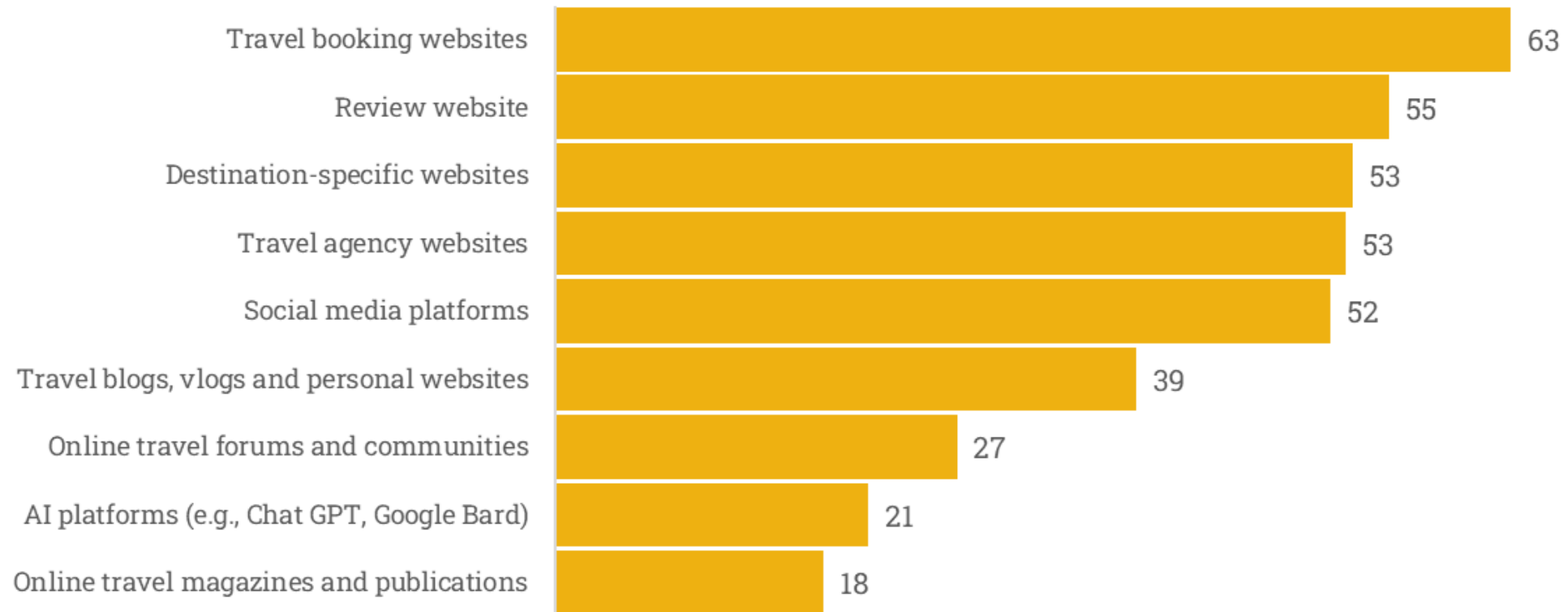
Sources of Information for Destination Selection (%)



Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

Social Media Participation

YouTube	91%
Instagram	90%
Facebook/META	82%
Tik Tok	69%
Twitter/X	61%
LinkedIn	49%
Pinterest	45%
Snapchat	25%
Reddit	20%
Tumblr	12%

Note: Brazilian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region.

Source: Brand USA (Aug. 2024)

BRAZIL

Likelihood of how 2025 will evolve:

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

65%

Travelers are likely to take a slow-cation in the next year (i.e., a longer trip spent in a single destination)

60%

Travelers are more proactive in reducing the impact of their travel on the environment

56%

Global wars/strife will impact the destinations visited in 2025

54%

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

50%

If a U.S. destination has a problem with over-tourism, travelers are less likely to visit

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