

TRAVEL SOUTH  USA

# ARKANSAS

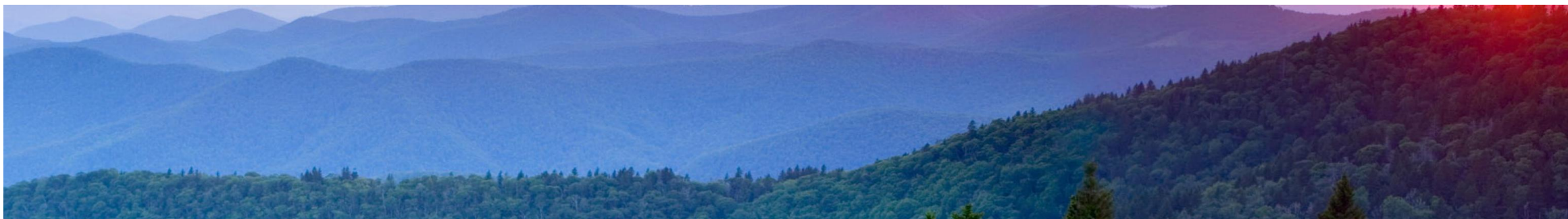


**INTERNATIONAL MARKETS**

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

# Arkansas' International Visitor Economy



## *Highlighting the State's Global Interconnectivity*



### Forecasts

- By 2025, forecasted to reach **\$110 million and 103,000** visitors

### US Inbound Travel Rebound - Key Markets

- International inbound spending is expected to decline by 4% from 2024, a 6% decrease compared to 2019.
- **Japan, India and Brazil are projected to grow** in 2025, with **South Korea** remaining flat.
- Fueled by visitors from **India, DACH Region, United Kingdom/Ireland, Canada, Mexico, Australia, Brazil, Taiwan, South Korea, and China**, accounting for **58%** of the state's 2023 international tourism expenditures.

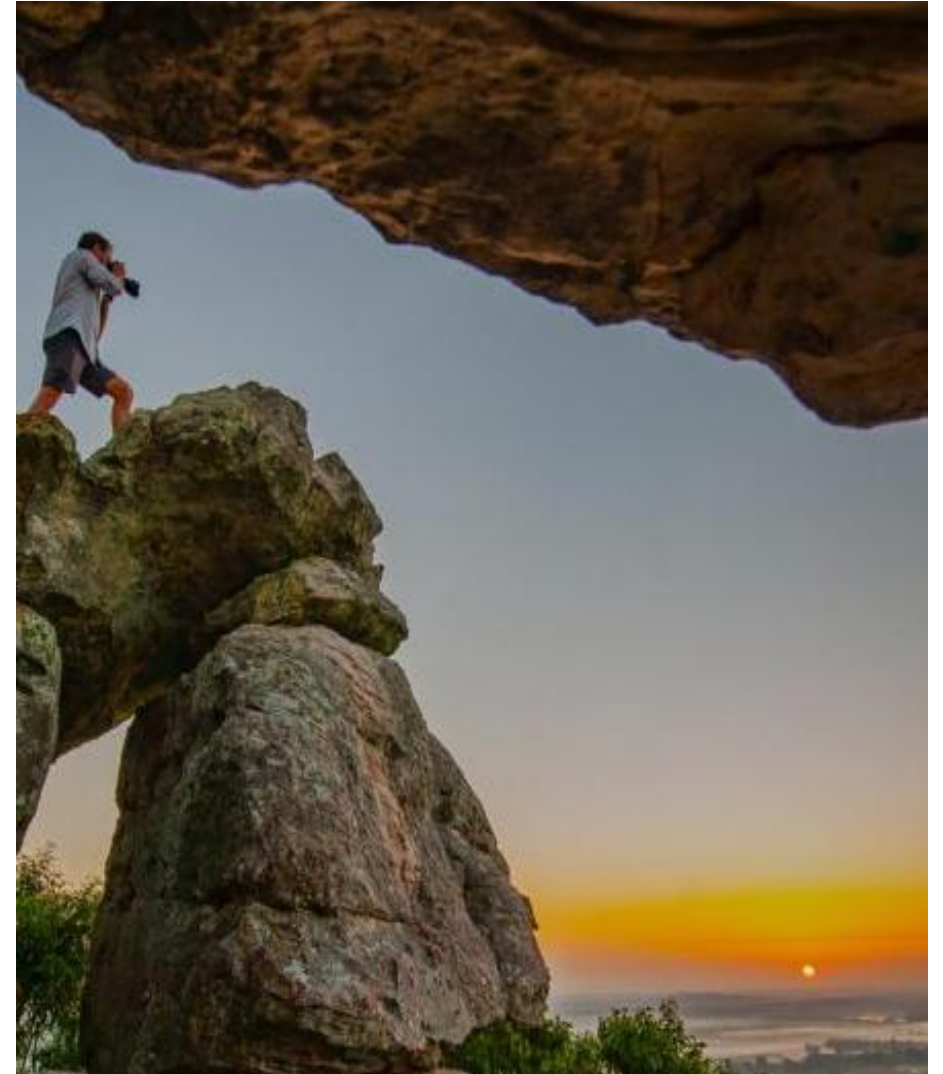
### Exports by Market

- **1,600** companies exported **\$7 billion** worth of goods
- Exports to **Canada, Mexico, Japan, China, Brazil and the United Kingdom** are among the top origin markets of visitation
- **India** accounts for three out of ten international student population
- **81%** 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

*April 15, 2025*

# 2025 Outlook: Visitor Spending by Key Markets

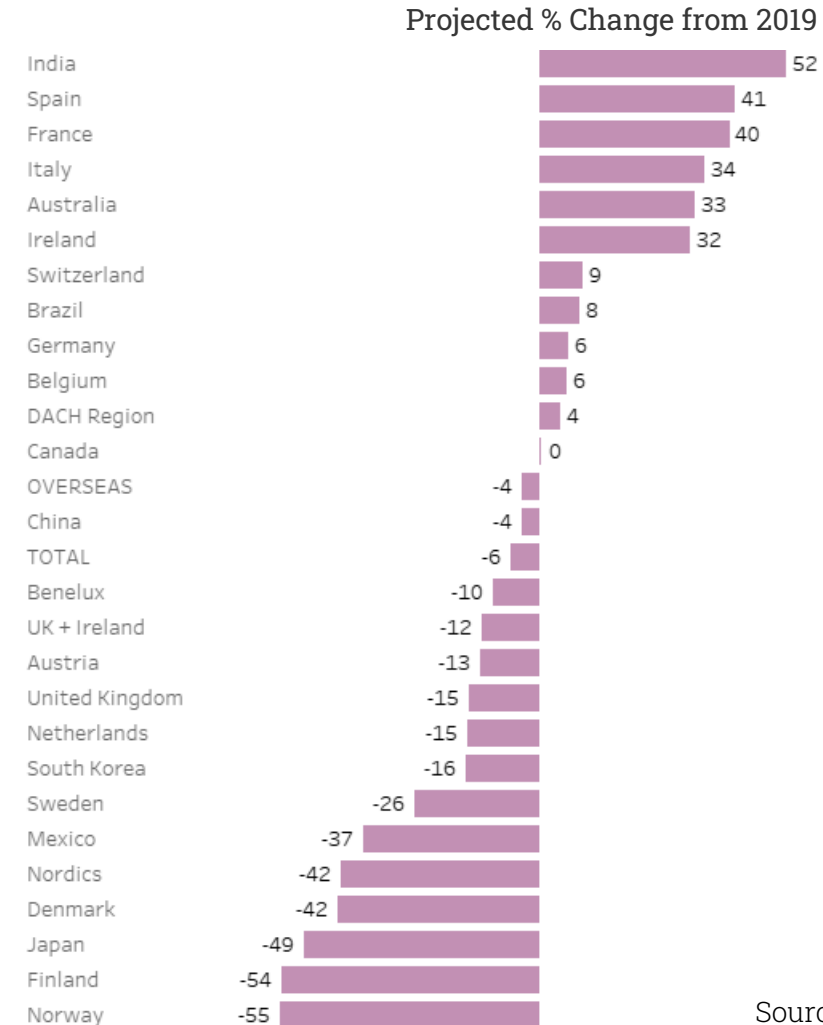
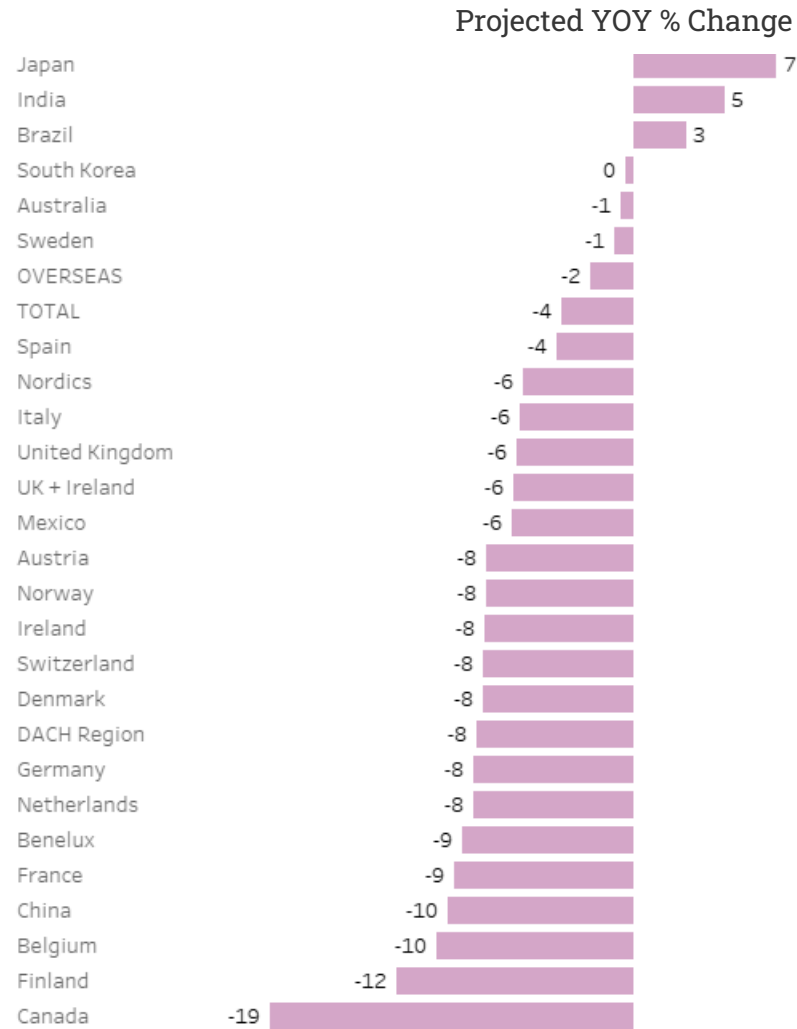


Spending (millions)



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

## 2019 Baseline Comparison

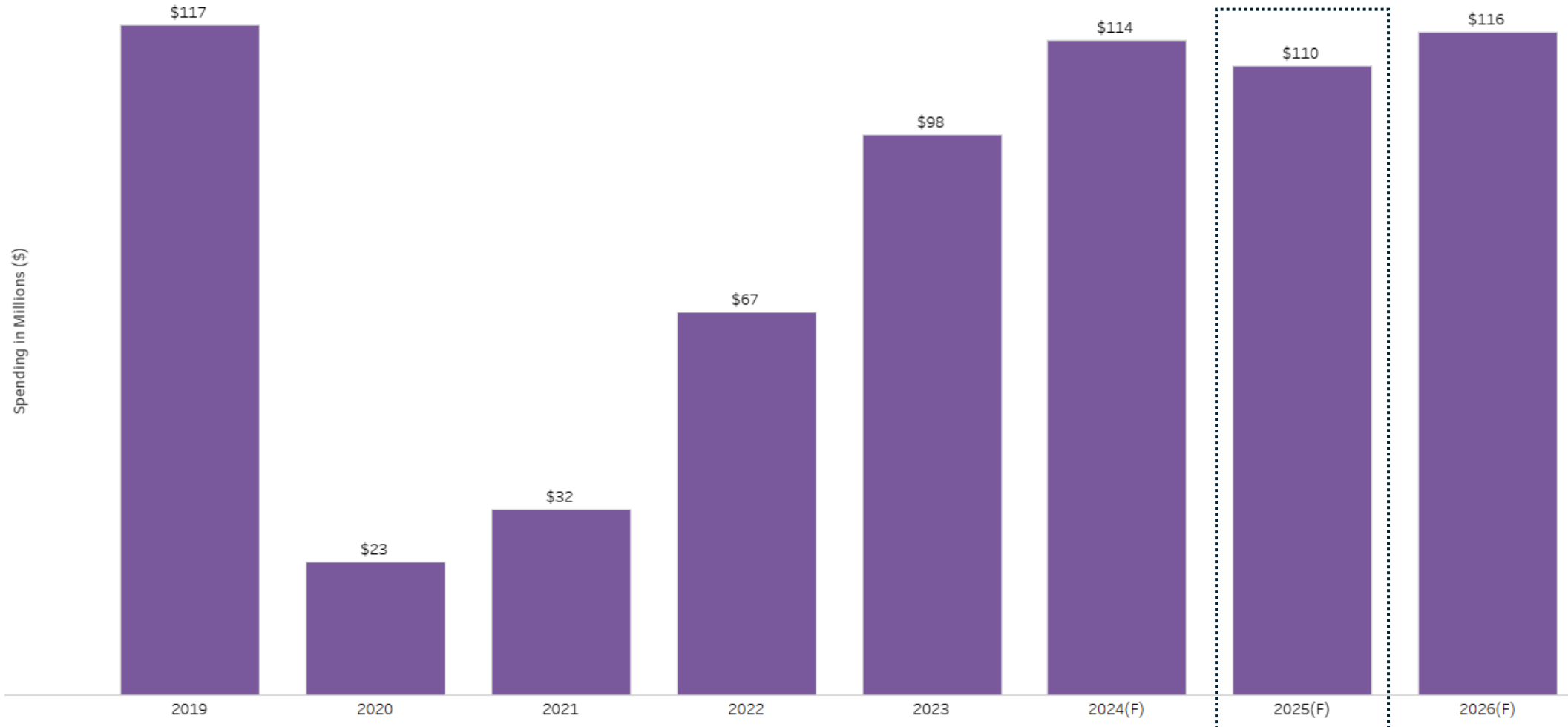




# ARKANSAS



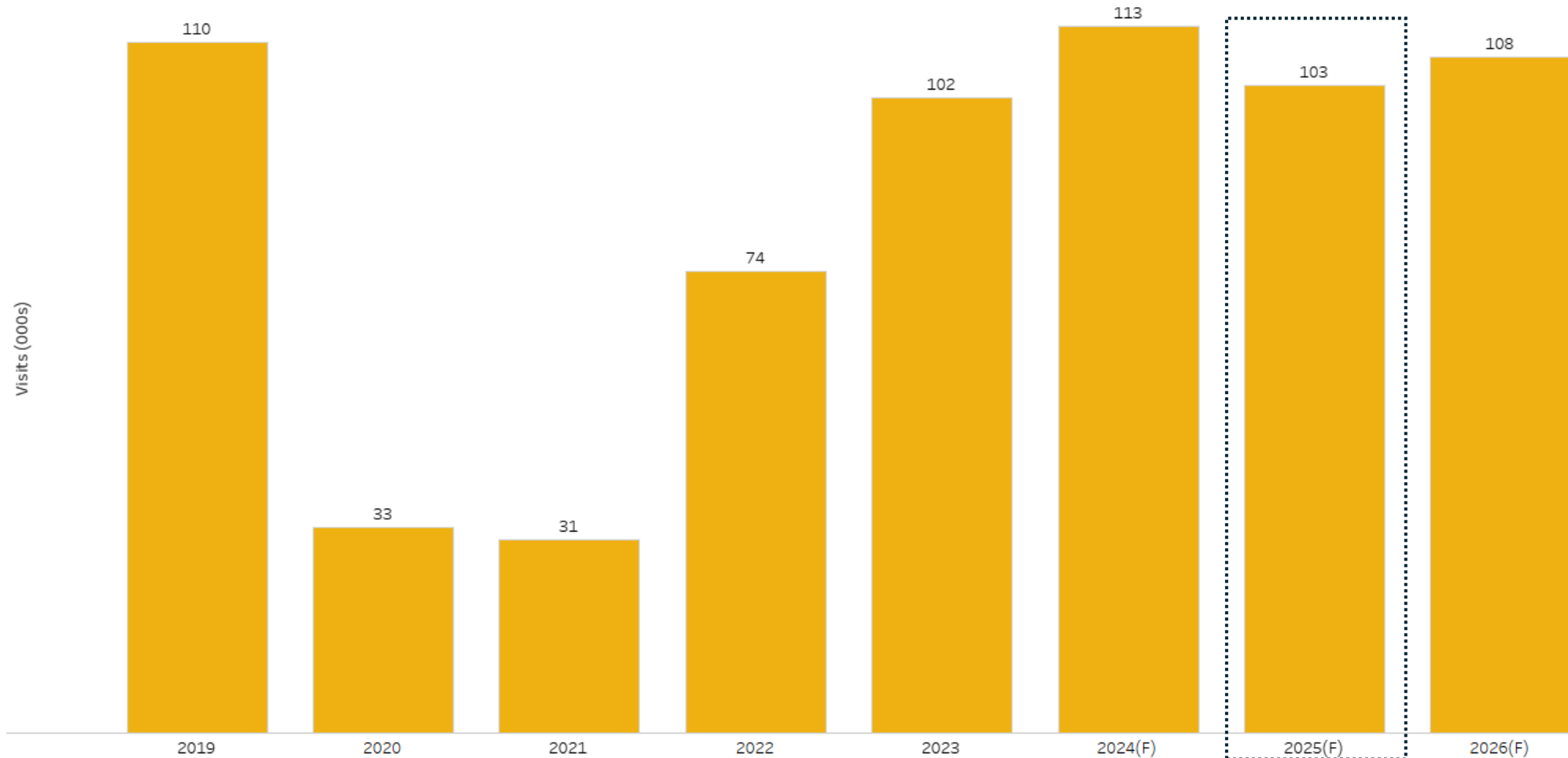
2025 Spending Outlook: Down 4% from 2024, still below 2019



# ARKANSAS



2025 Visitor Volume Outlook: Down 8% from 2024, still below 2019



# ARKANSAS



## \$110M Projected Spend and 103,000 Visits in 2025, down 4% and 8% from 2024

- Tourism Economics estimates **Overseas spending** to decline by 2% year-over-year (yoy) in 2025 – **Canada, a 19% decline**
- **Japan, India and Brazil** are projected to grow in 2025, with **South Korea** remaining flat
- **U.K./Ireland, India, Canada, Australia and the DACH Region** are forecasted to be amongst the top five markets

Market	Spending (\$M)	📊	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
TOTAL	110		-4	103	-8	-6	-6
OVERSEAS	97		-2	65	-4	-4	-3
UK + Ireland	9		-6	7	-7	-12	-8
India	9		5	5	1	52	55
United Kingdom	8		-6	6	-7	-15	-7
Canada	7		-19	18	-21	0	-22
Australia	6		-1	3	-2	33	-4
DACH Region	6		-8	4	-9	4	-10
Brazil	6		3	3	-2	8	27
Mexico	6		-6	21	-8	-37	3
China	5		-10	3	-9	-4	-33
South Korea	4		0	3	-1	-16	-24
Japan	4		7	4	7	-49	-50
Germany	4		-8	2	-10	6	-18
France	3		-9	3	-10	40	16
Nordics	2		-6	1	-7	-42	-40
Italy	2		-6	1	-8	34	-1
Benelux	2		-9	1	-9	-10	-17

# ARKANSAS



## \$110M Projected Spend and 103,000 Visits in 2025 (cont.)

Market	Spending (\$M)	☰	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
Israel	2		11	1	6	-29	-7
Taiwan	1		16	1	8	-47	-7
Spain	1		-4	1	-7	41	19
Switzerland	1		-8	1	-8	9	10
United Arab Emirates	1		1	0	3	-34	-39
Netherlands	1		-8	1	-10	-15	-14
Poland	1		2	1	-5	77	128
Philippines	1		1	1	1	23	45
South Africa	1		0	0	-2	-6	-26
Ireland	1		-8	1	-7	32	-13
Argentina	1		5	1	1	-6	-25
Sweden	1		-1	1	-4	-26	-29
Ukraine	1		6	0	4	127	-35
Egypt	1		-4	0	-4	-63	-42
Denmark	1		-8	0	-11	-42	-38
Austria	1		-8	0	-8	-13	26
Singapore	1		1	0	1	-40	-28
Turkiye	1		2	0	-1	-23	-54

# ARKANSAS



## Visitor Spending 2019-2025F:

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending (\$M)	TOTAL	\$117	\$23	\$32	\$67	\$98	\$114	\$110
	OVERSEAS	\$101	\$19	\$28	\$57	\$84	\$99	\$97
	UK + Ireland	\$10	\$1	\$1	\$8	\$9	\$10	\$9
	India	\$6	\$1	\$2	\$5	\$6	\$8	\$9
	Canada	\$7	\$1	\$1	\$5	\$9	\$9	\$7
	Australia	\$5	\$1	\$0	\$1	\$5	\$6	\$6
	DACH Region	\$6	\$1	\$1	\$5	\$6	\$6	\$6
	Brazil	\$5	\$1	\$1	\$4	\$5	\$6	\$6
	Mexico	\$9	\$3	\$4	\$5	\$5	\$6	\$6
	China	\$6	\$1	\$1	\$1	\$3	\$6	\$5
	South Korea	\$5	\$1	\$1	\$2	\$4	\$4	\$4
	Japan	\$8	\$1	\$1	\$2	\$4	\$4	\$4
	France	\$2	\$0	\$1	\$2	\$3	\$3	\$3
	Nordics	\$3	\$1	\$0	\$2	\$2	\$2	\$2
	Italy	\$1	\$0	\$0	\$1	\$2	\$2	\$2
	Benelux	\$2	\$0	\$0	\$1	\$1	\$2	\$2
	Spain	\$1	\$0	\$0	\$1	\$1	\$1	\$1

# ARKANSAS



## Visits 2019-2025F

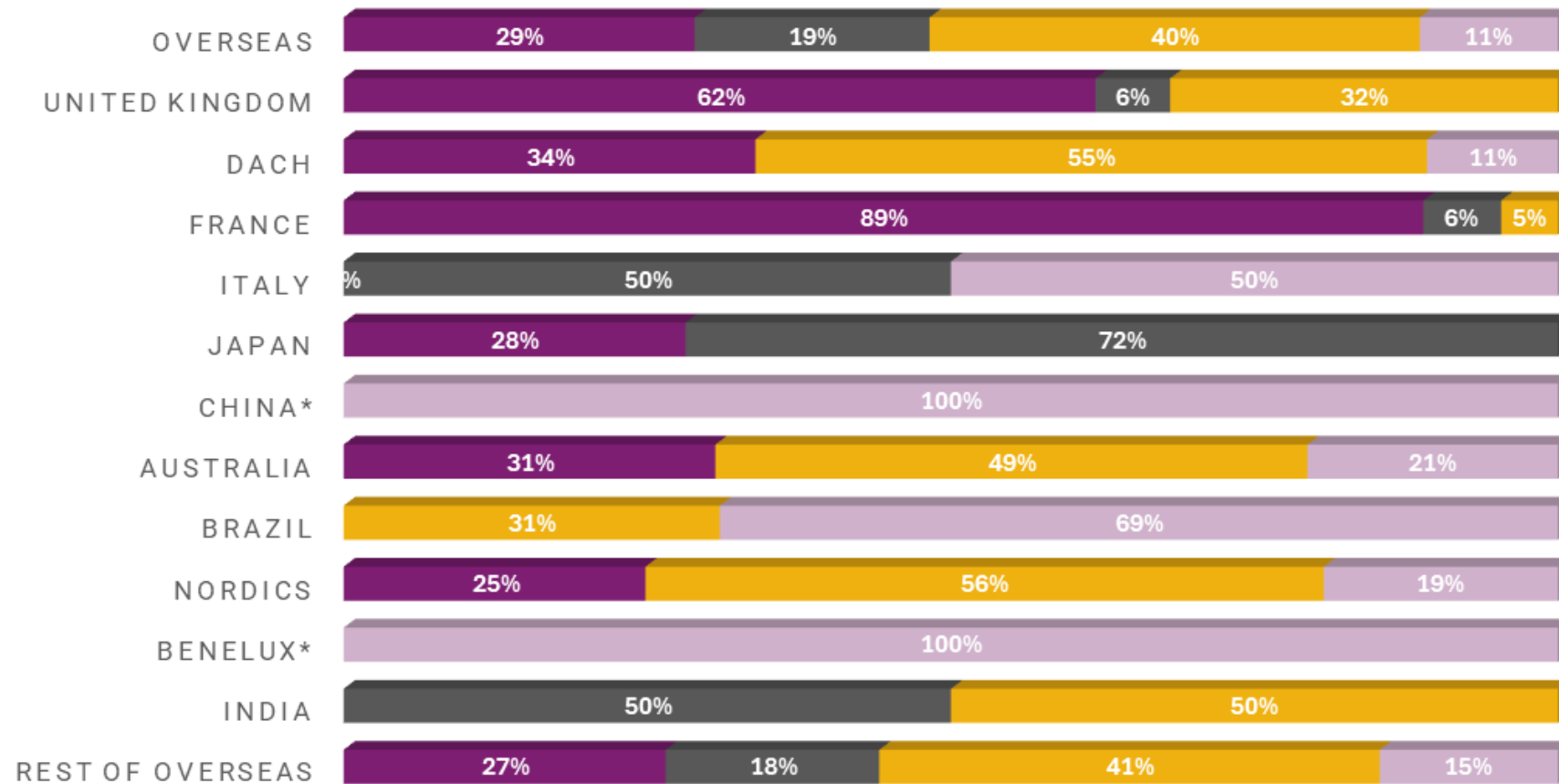
		2019	2020	2021	2022	2023	2024(F)	2025(F)
Visits (000s)	TOTAL	110	33	31	74	102	113	103
	OVERSEAS	67	18	18	42	59	67	65
	Mexico	20	9	10	17	19	22	21
	Canada	24	6	3	15	23	23	18
	UK + Ireland	7	2	1	6	7	7	7
	India	3	1	1	3	4	5	5
	DACH Region	4	1	1	3	3	4	4
	Japan	7	2	1	1	3	3	4
	Brazil	2	1	1	2	2	3	3
	Australia	3	1	0	1	3	3	3
	South Korea	4	1	0	1	3	3	3
	France	2	1	1	2	3	3	3
	China	4	1	0	1	2	3	3
	Nordics	2	1	0	1	2	2	1
	Benelux	2	1	0	1	1	2	1
	Italy	1	0	0	1	1	1	1
	Spain	1	0	0	1	1	1	1

# ARKANSAS



ARKANSAS: Purpose of Trip

Leisure Business VFR Other



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



# Exports (Goods)



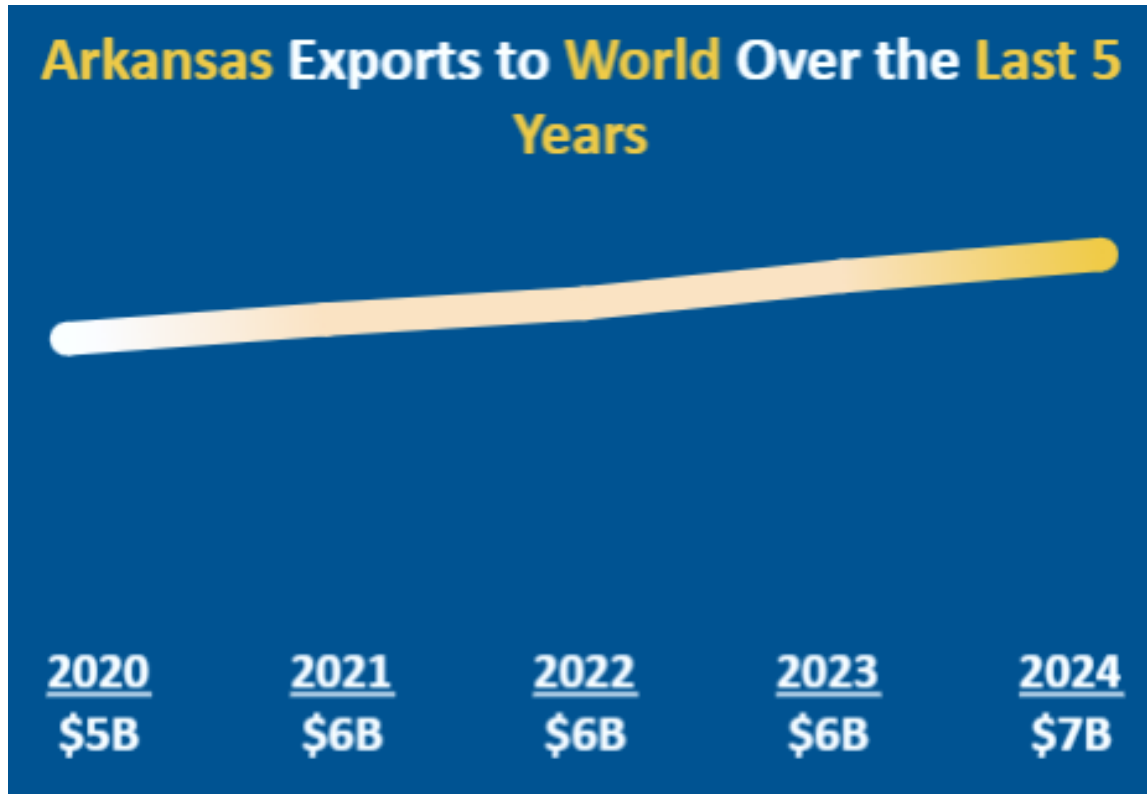
## EXPORTS IN GOODS *2024*

**\$7 Billion**

## TOP COUNTRIES

MEXICO  
CANADA  
FRANCE  
CHINA  
BRAZIL  
JAPAN

## Arkansas Exports to World Over the Last 5 Years



## Goods Exports by Country

(in millions)

Partner	2024
World	\$6,894
Mexico	\$1,597
Canada	\$1,490
France	\$400
China	\$227
Brazil	\$159
Japan	\$153
Switzerland	\$153
Israel	\$151
United Kingdom	\$140
South Korea	\$138
Netherlands	\$138
Belgium	\$130
Indonesia	\$112
Ukraine	\$109
Germany	\$104

1,625

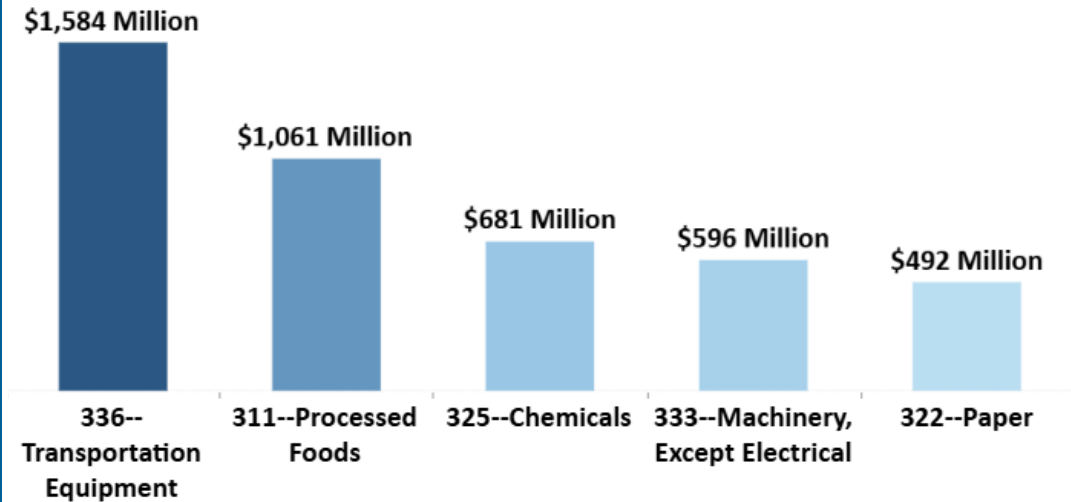
Arkansas companies exported goods in  
2021

78%

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

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

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



# International Students

# ARKANSAS

INTERNATIONAL  
STUDENTS  
*2022/23*

5,776

STUDENT-VISIT  
RATIO

4.9%

INDEXED  
STUDENT-VISIT  
RATIO  
U.S. = 100

460

## INTERNATIONAL STUDENTS, 2023/24



**5,776**

International Students



**34**

Rank in the United States\*



**1.7**

% Change from  
Previous Year



**\$146,885,647**

Estimated International  
Student Expenditure\*\*

## LEADING PLACES OF ORIGIN

Place of Origin	% Total
India	<b>32.3</b>
Bahamas	<b>5.5</b>
Nigeria	<b>4.8</b>
Panama	<b>4.3</b>
China	<b>3.9</b>

## LEADING INSTITUTIONS

Institution	Total
University of Arkansas - Fayetteville	<b>1,549</b>
Southern Arkansas University - Magnolia	<b>1,186</b>
University of Arkansas - Little Rock	<b>761</b>
University of Central Arkansas	<b>402</b>
University of the Ozarks	<b>249</b>

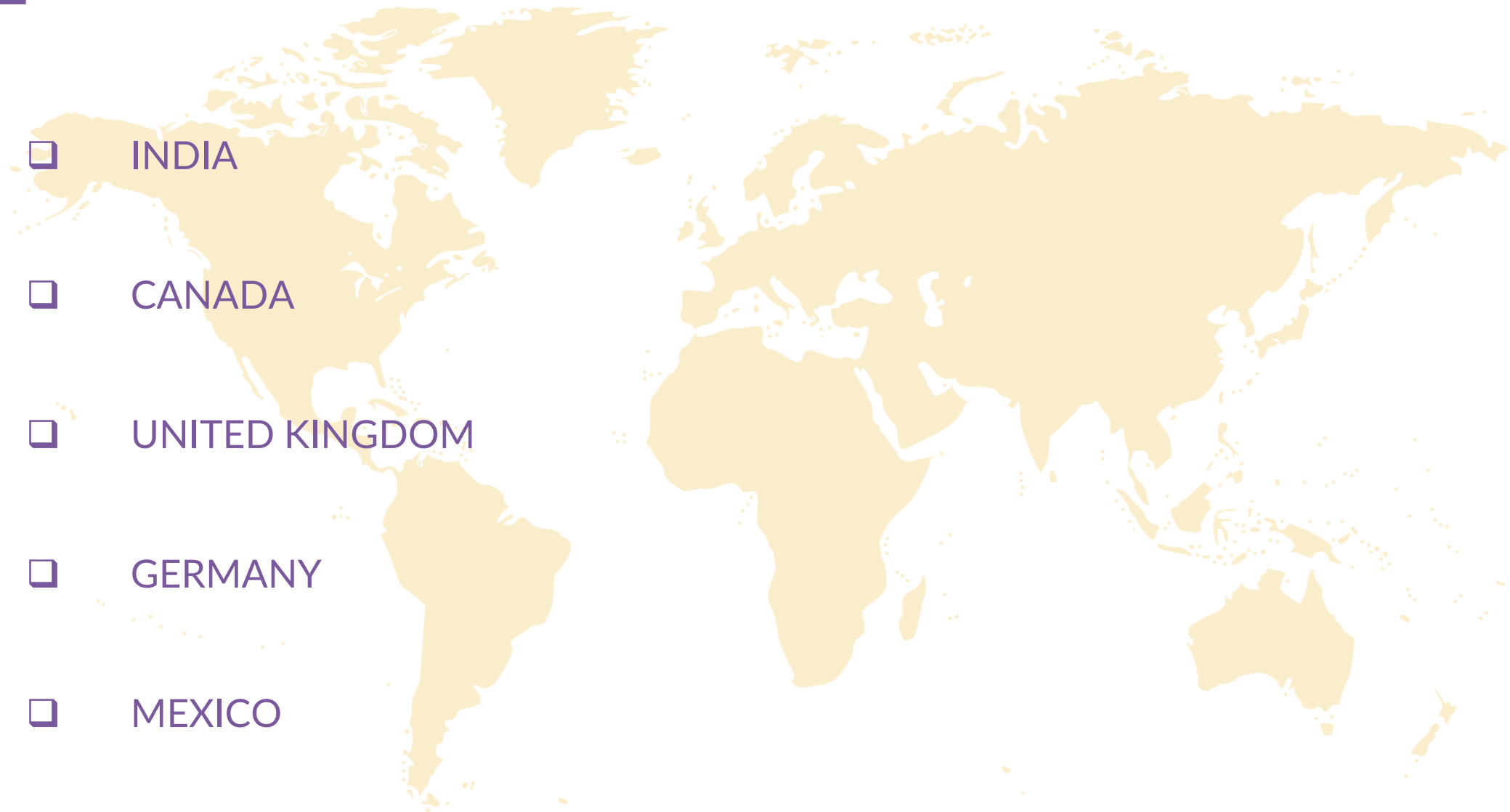


# Visitor Perception

# MARKET PROFILES

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TRAVEL·SOUTH  USA



# 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

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# 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

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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.

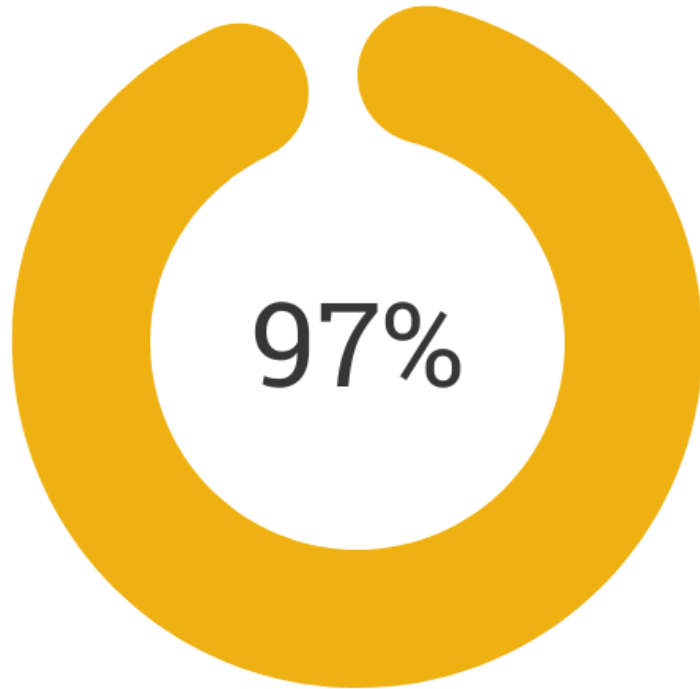


Note: Indian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

# INDIA

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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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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

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## 1+ Trips

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72%

## 1 Trip

---

40%

## 2 Trips

---

12%

## 3+ Trips

---

21%

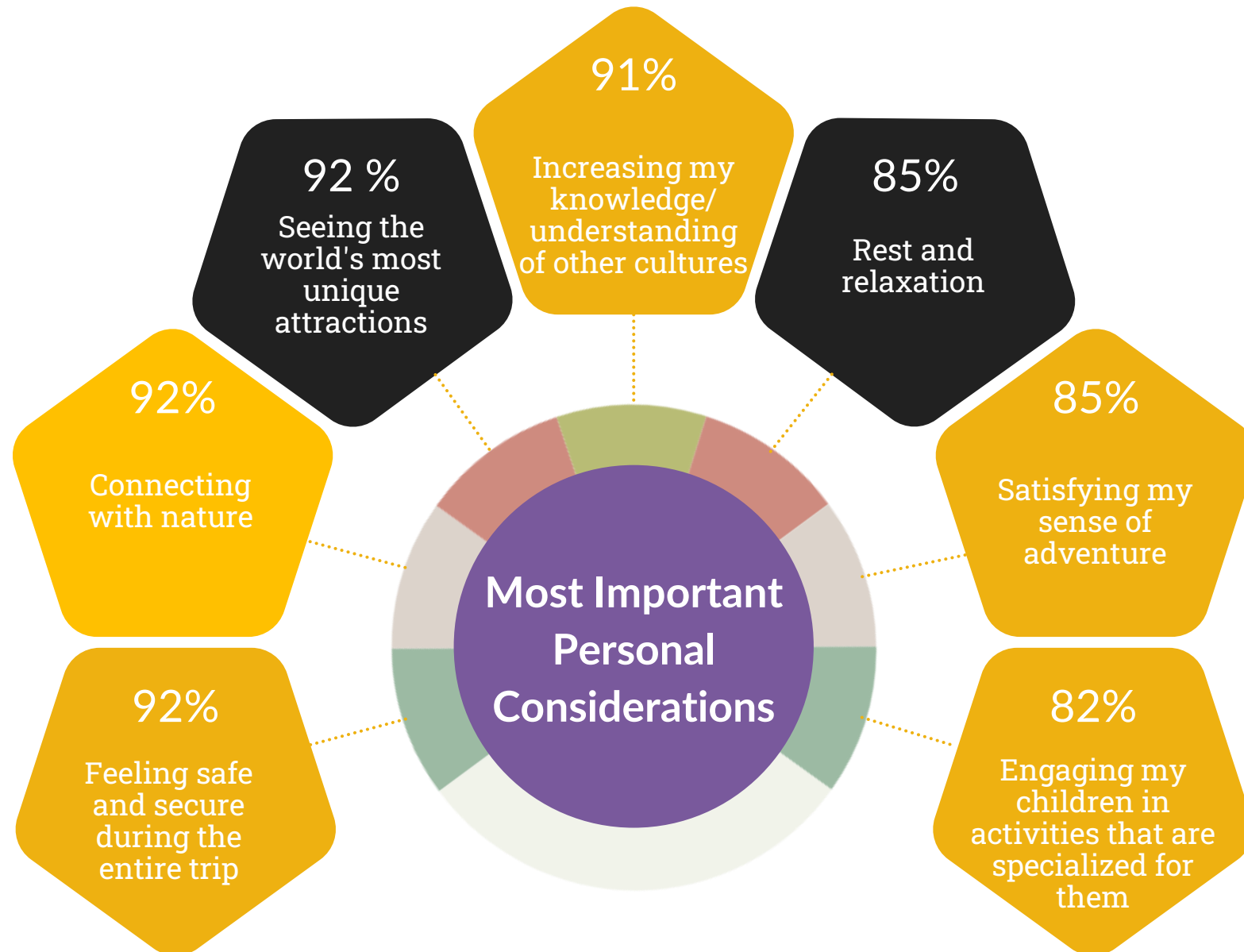
# 2.5

**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

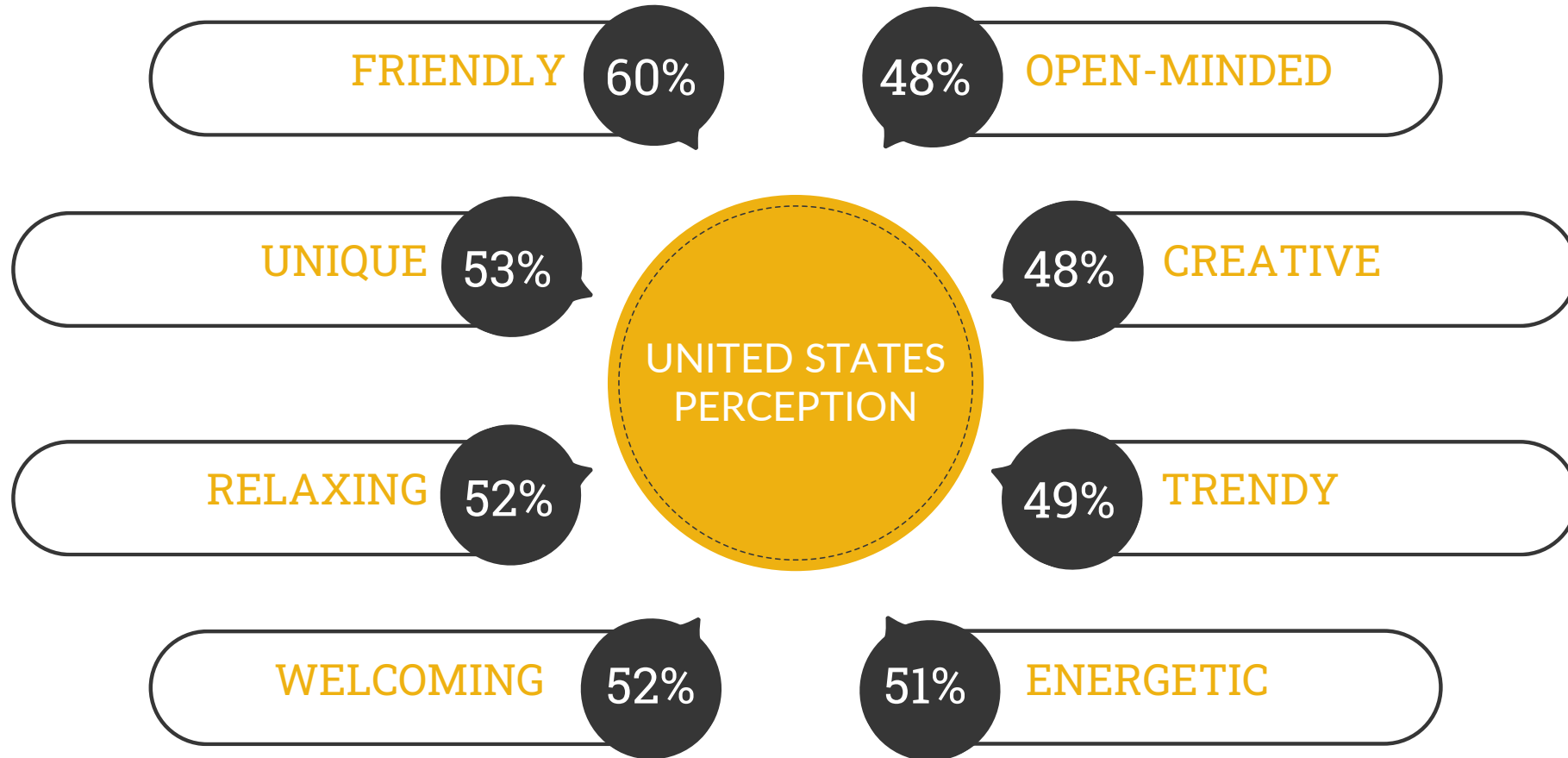
- 63%** Uncleanliness in the destination
- 55%** Personal safety concerns
- 52%** Inconvenience of travel to the destination
- 51 %** Lack of environmental responsibilities
- 48%** Lack of information for planning trip & at destination
- 46%** High prices
- 44%** Visa requirements/entry procedures
- 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

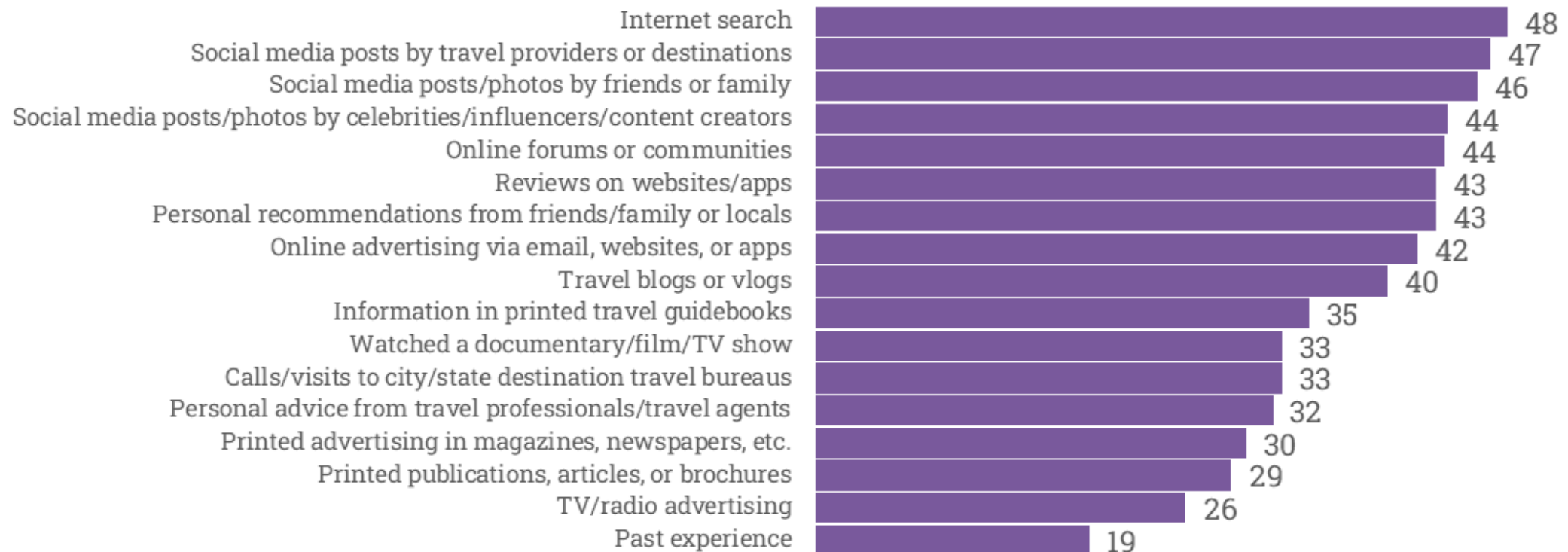
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Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

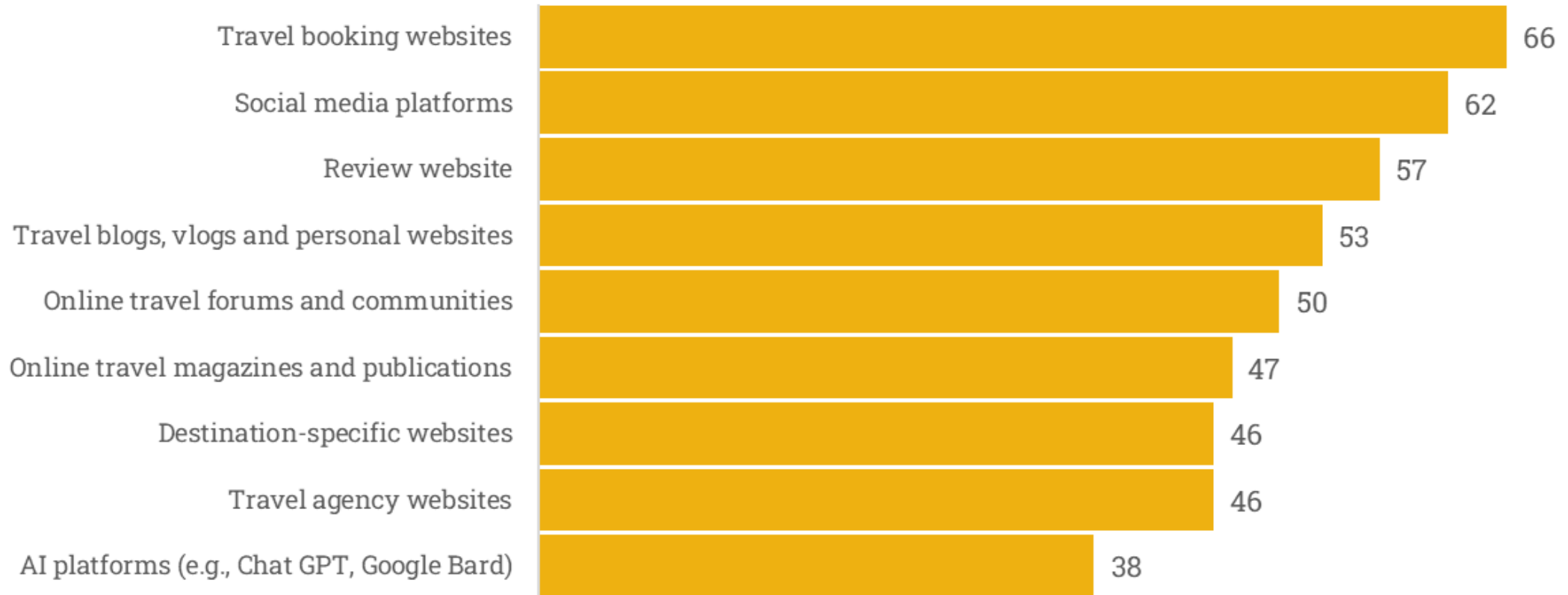
## Sources of Information for Destination Selection (%)



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

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## 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

# 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

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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
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- 14% Level of crowds
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- 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

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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: Canadian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

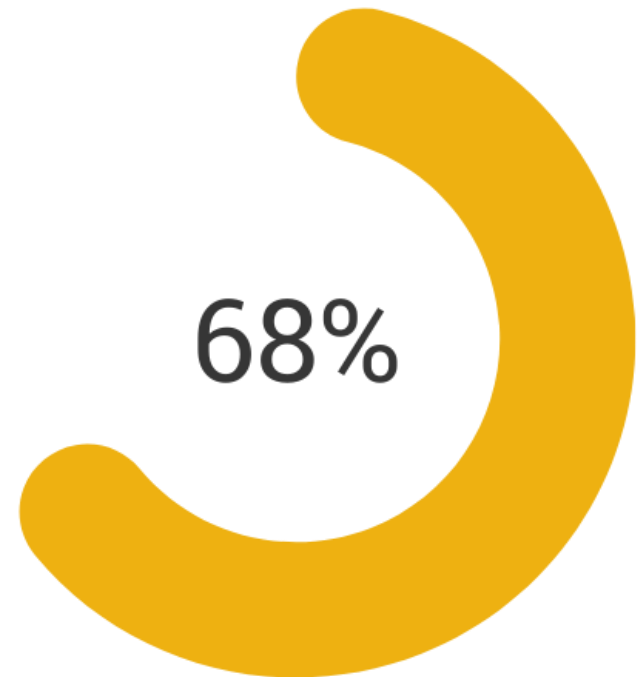
# CANADA

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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

---



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%

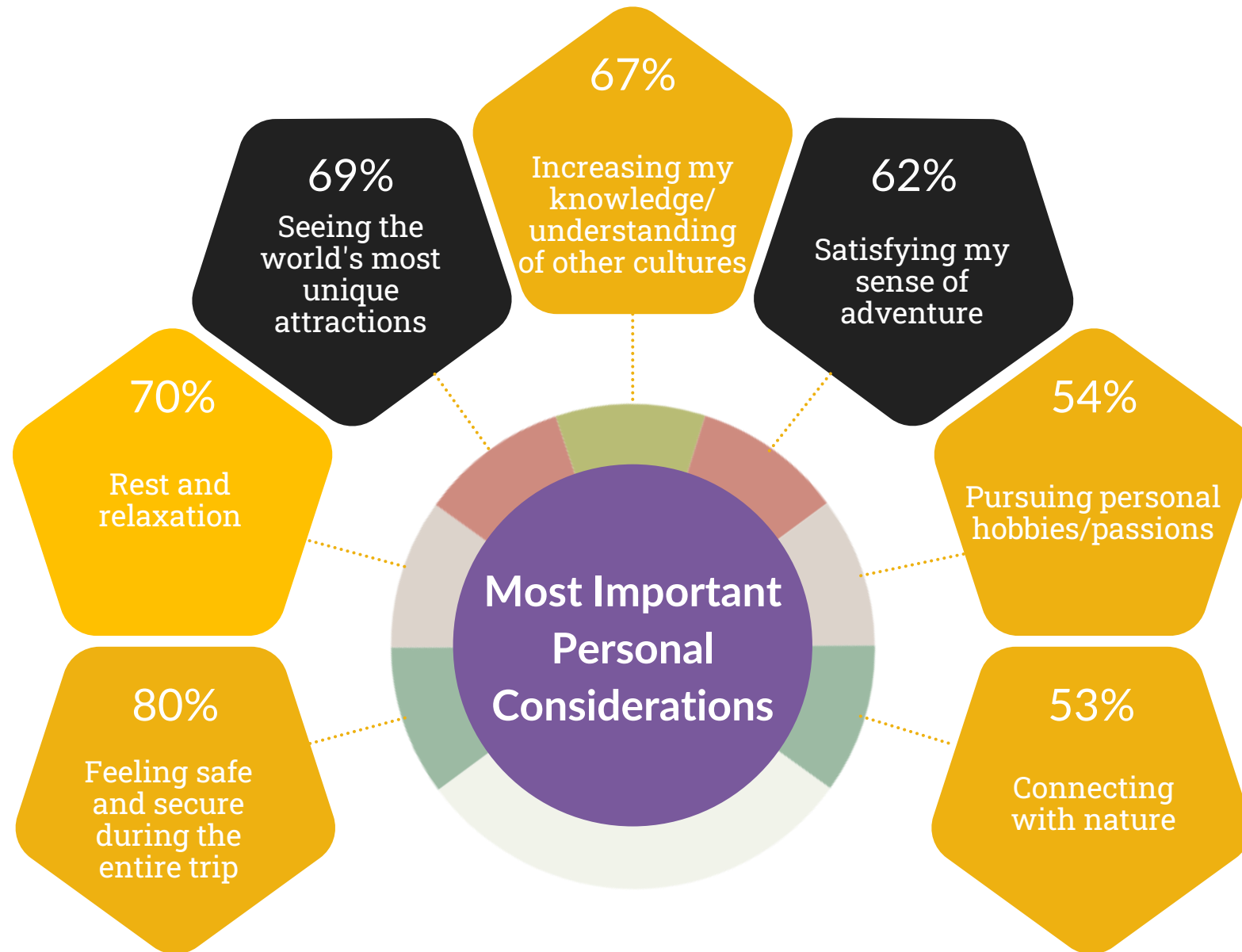
# 0.5

**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

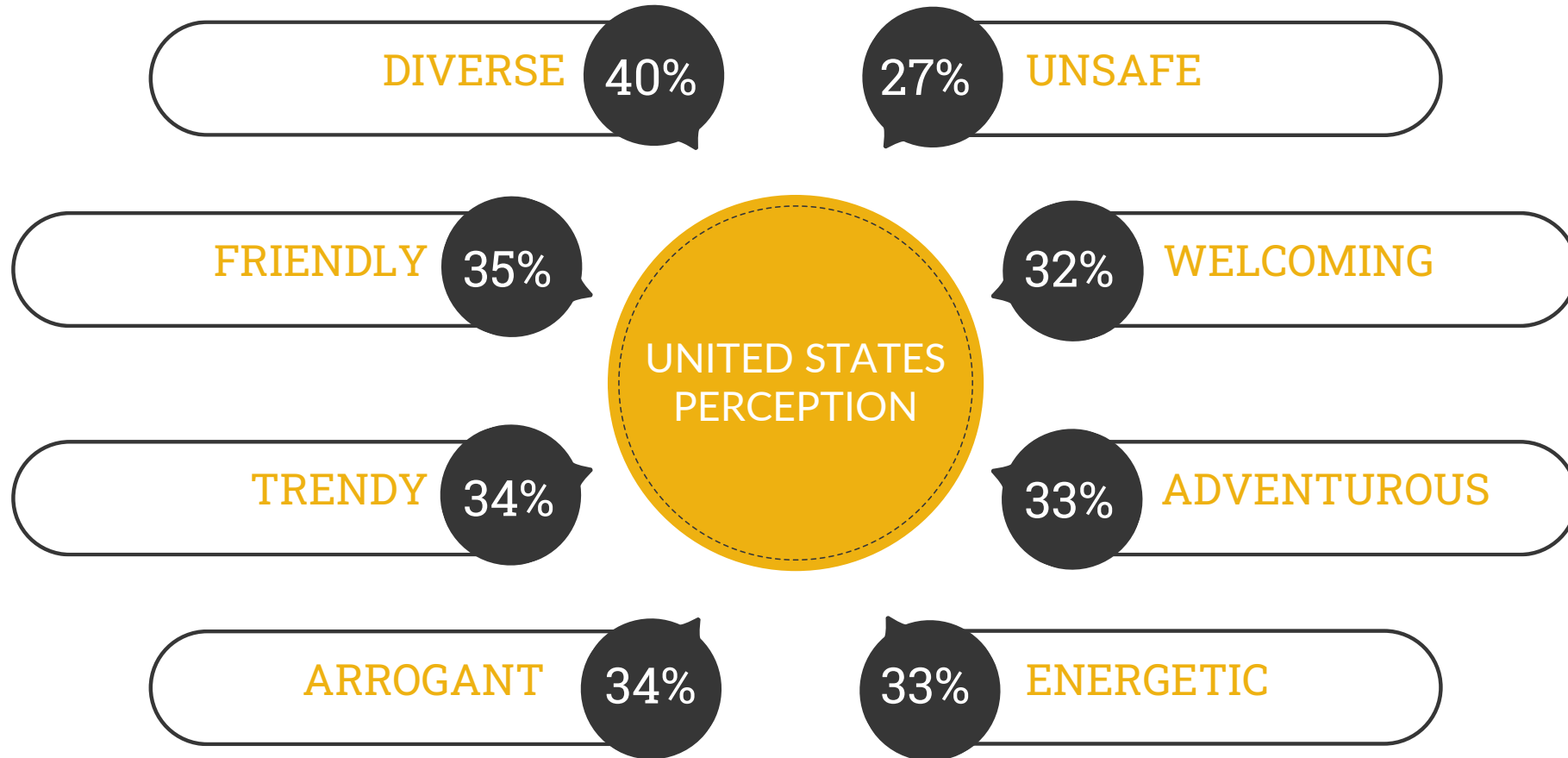
## Most Discouraging From Visiting a Destination

- 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)

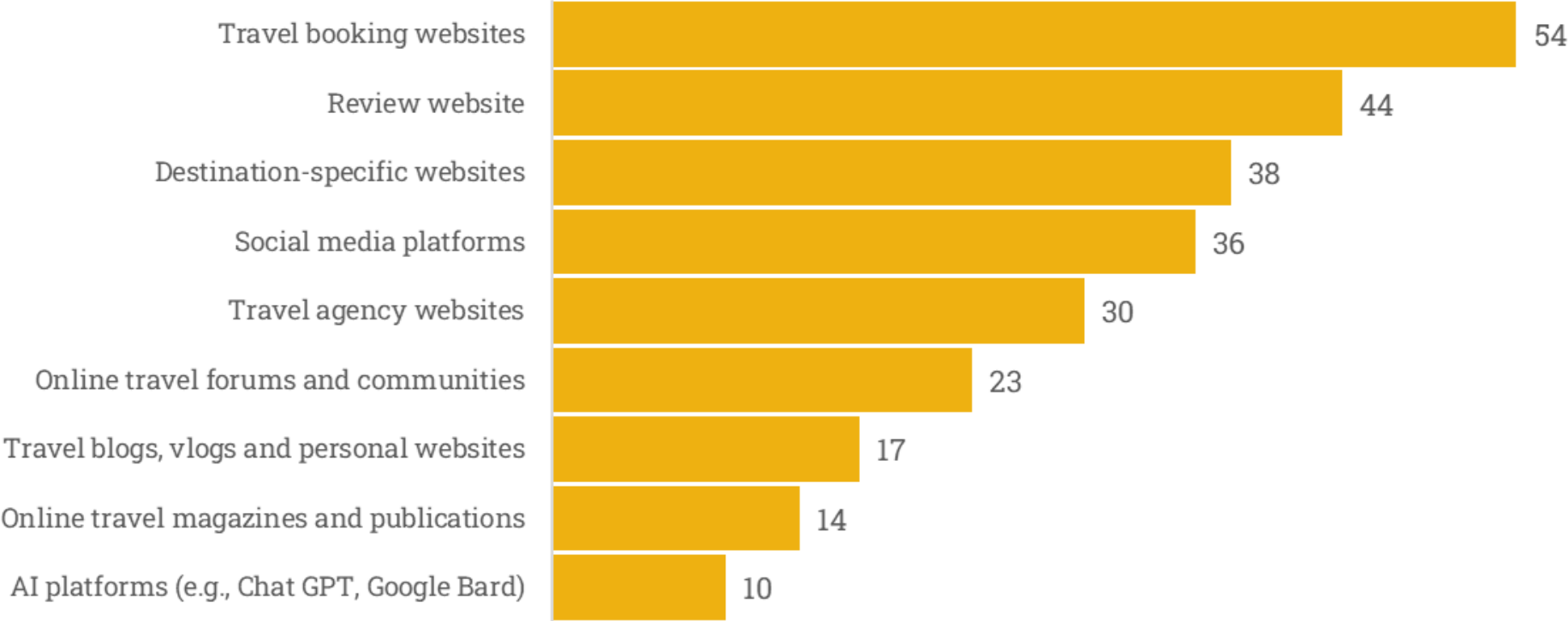
## Sources of Information for Destination Selection (%)



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

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## 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

# 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%

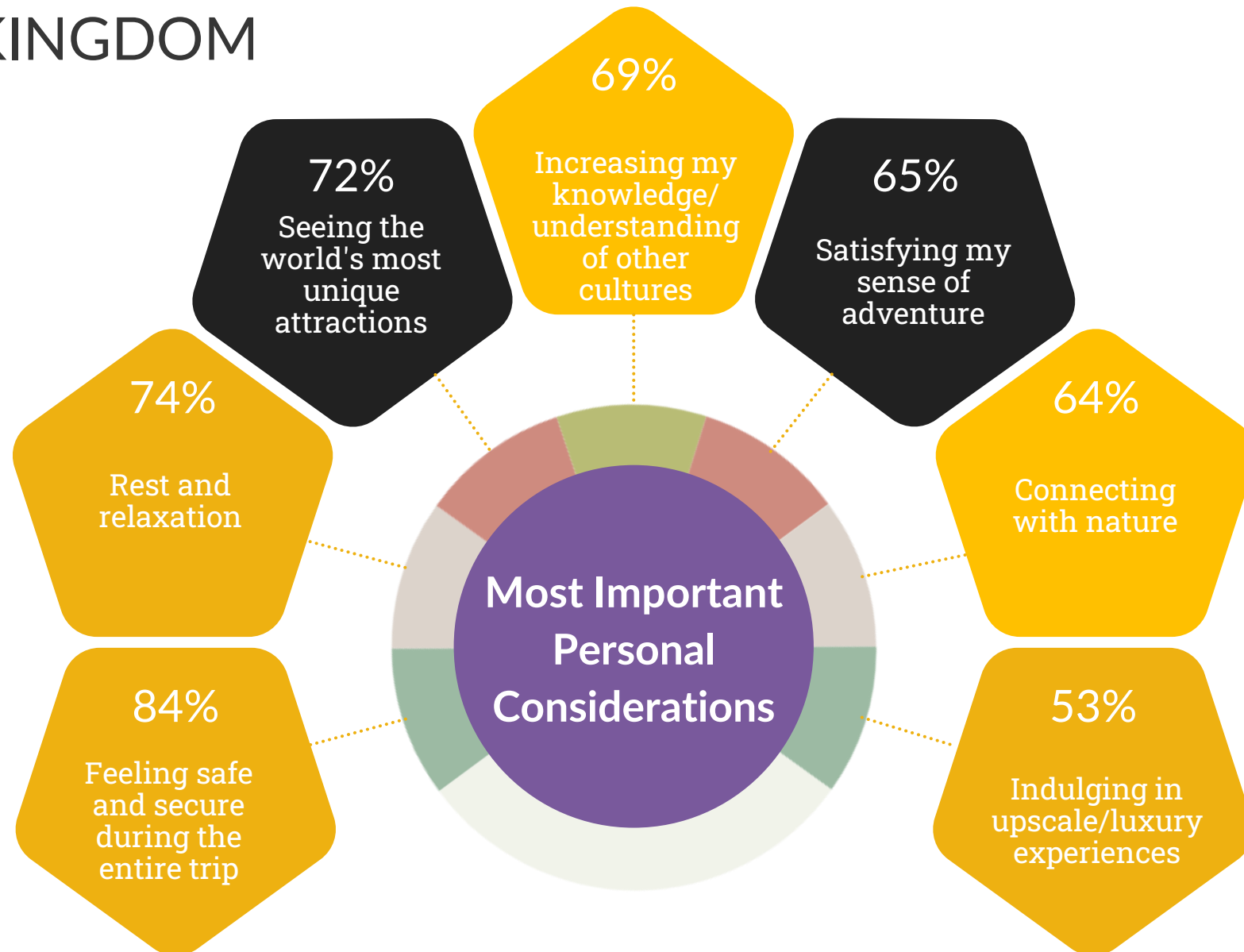
0.7

**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

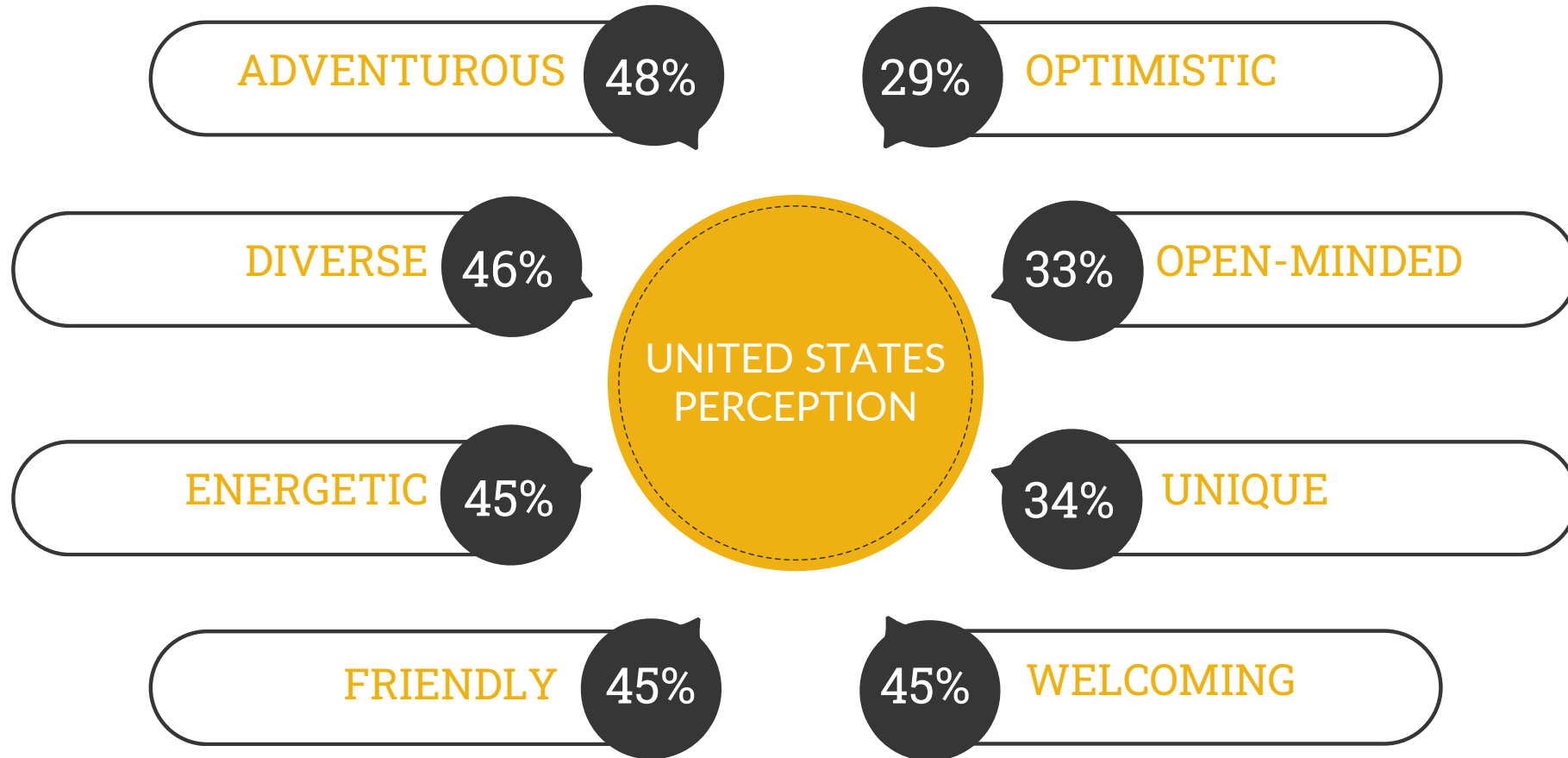
## Most Discouraging From Visiting a Destination

- 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)

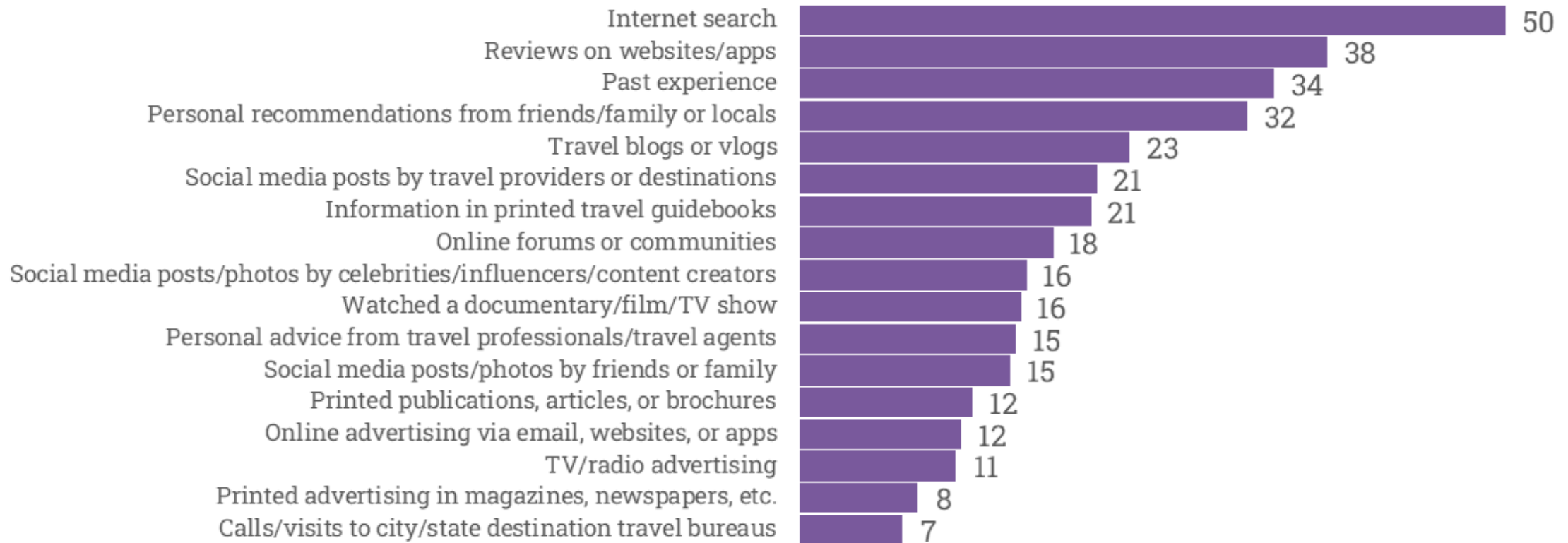
# UNITED KINGDOM



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 (%)

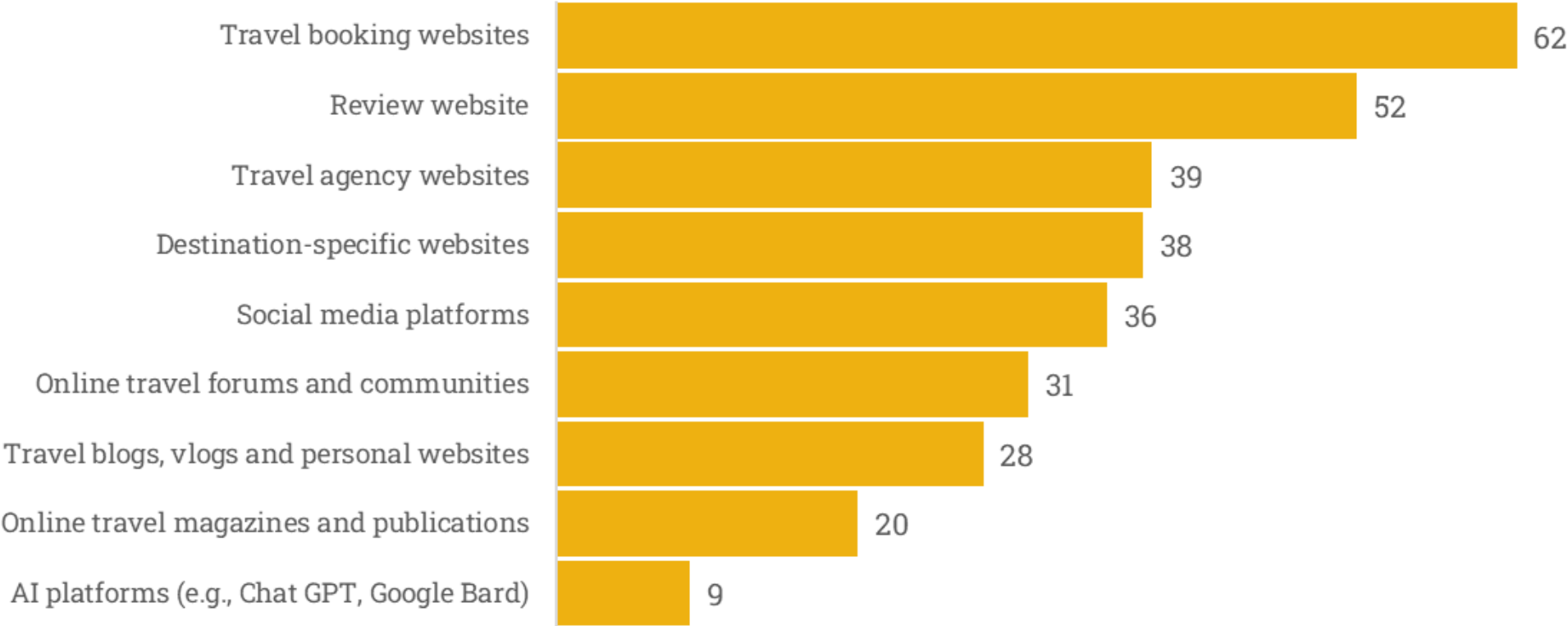


Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

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)

# GERMANY



POPULATION  
*2024*

85M

REAL GDP  
GROWTH  
*2025 PROJECTION*

0.8%

CURRENCY  
RATE  
EURO  
2024

0.92

INFLATION  
RATE  
*2025 PROJECTION*

2.0%

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

6.3%

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

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
- 18% Shopping
- 18% Family fun
- 17% Museums and culture
- 17% Sightseeing tours
- 15% Ways to experience the American lifestyle
- 12% Transportation and how to get around
- 12% Entertainment, events, shows
- 12% Outdoor activities (biking, boating, hiking, etc.)
- 11% Touristy attractions to avoid
- 11% Recommendations from residents
- 11% Off-the-beaten path attractions
- 10% Things to do outside the large cities
- 9% Theme parks
- 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)

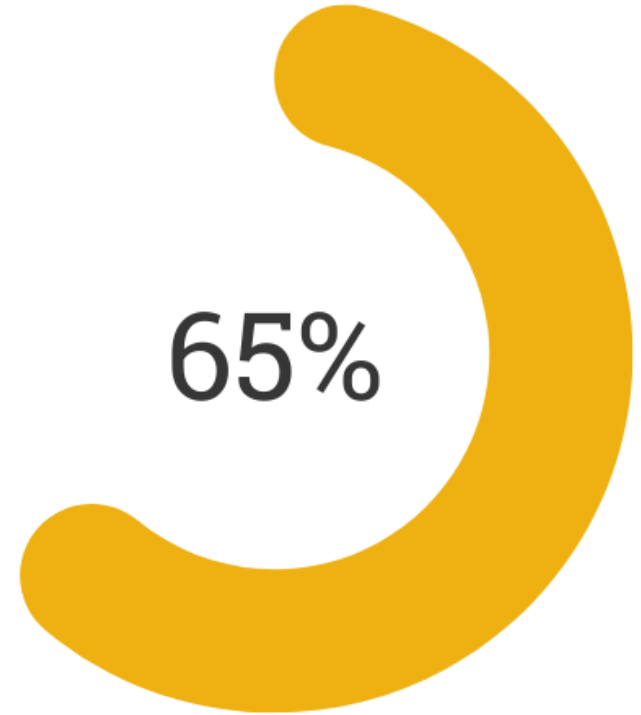
# GERMANY

---



## 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

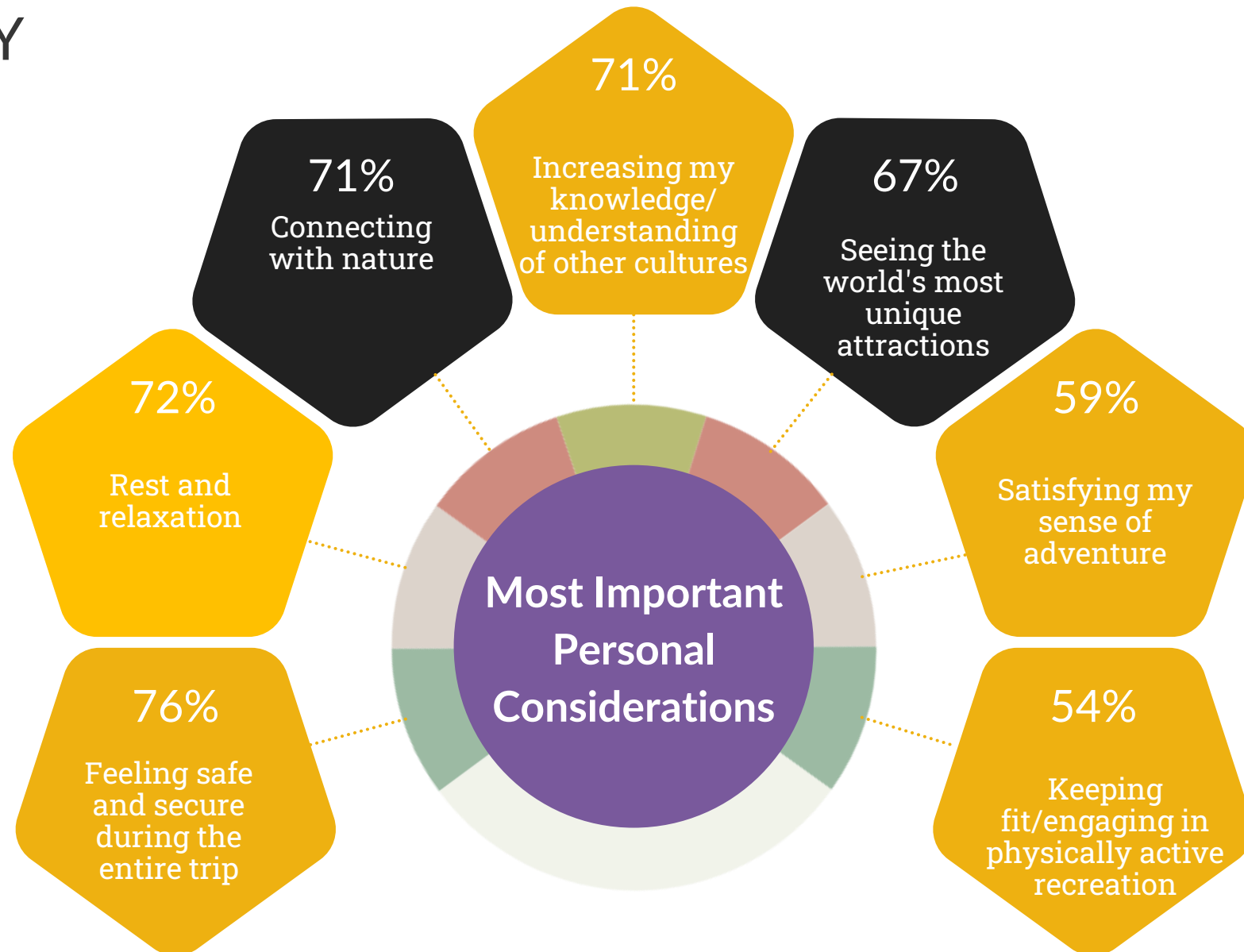
---

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

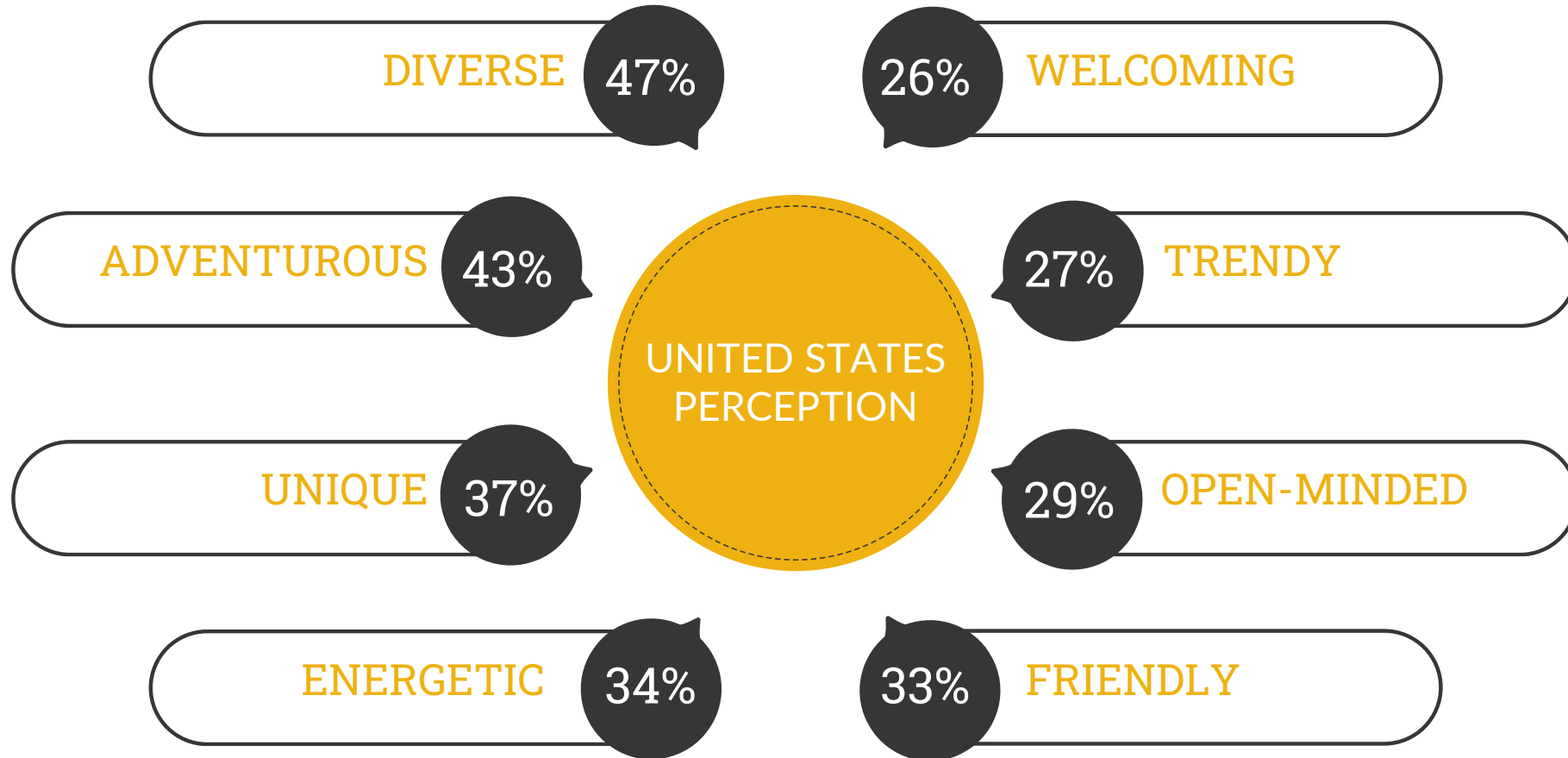
- 48%** Personal safety concerns
- 46%** Uncleanliness in the destination
- 42%** Crowdedness
- 38%** High prices
- 38%** Political climate not aligning with personal views
- 31%** Lack of environmental responsibilities
- 30%** Lack of information for planning trip & at destination
- 25%** Inconvenience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

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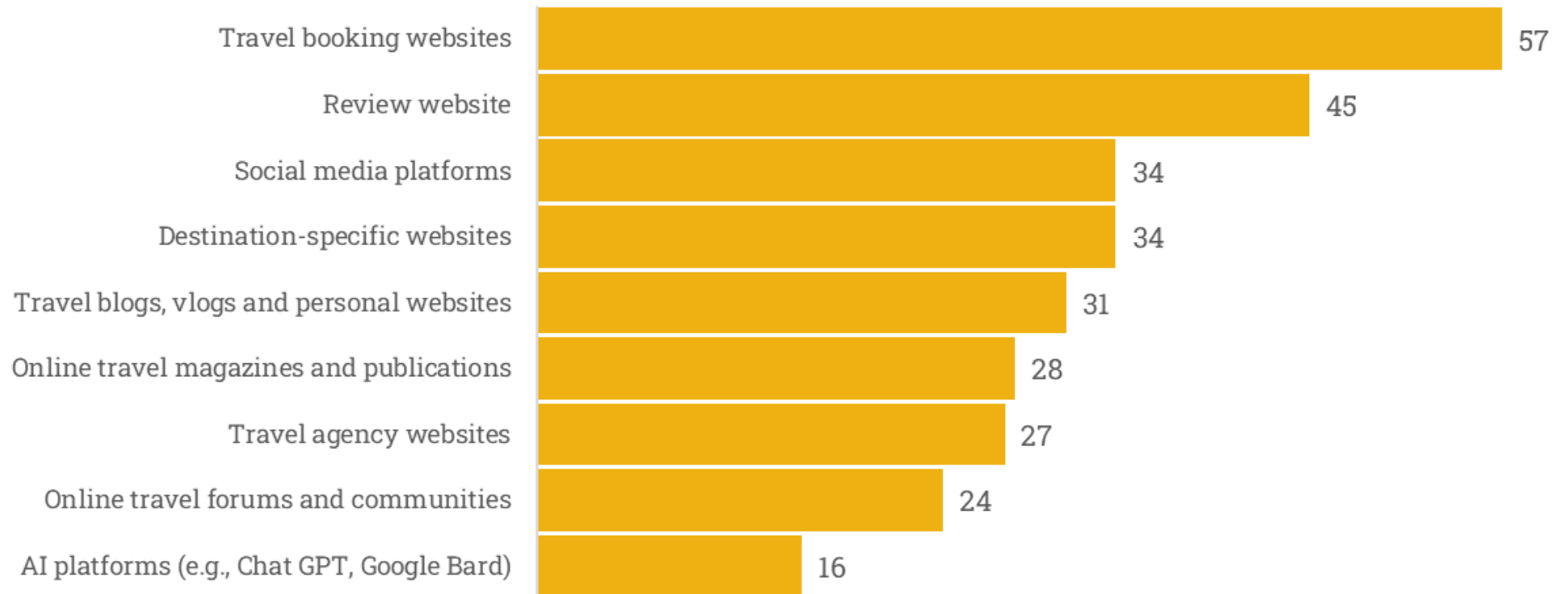
Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

## Sources of Information for Destination Selection (%)



## 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



# MEXICO



POPULATION  
*2024*

131M

REAL GDP  
GROWTH  
*2025 PROJECTION*

1.3%

CURRENCY  
RATE  
MEXICAN PESO  
2024

18.33

INFLATION  
RATE  
*2025 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

---

59%

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:



- 34% Restaurants and food
- 34% Hotels and lodging
- 30% Shopping
- 28% Theme parks
- 28% Museums and culture
- 27% Family fun
- 25% Safety
- 24% Sightseeing tours
- 23% Entertainment, events, shows
- 22% Beaches
- 20% Historical attractions
- 18% Important or iconic attractions
- 18% National Parks
- 15% Opportunities for relaxation
- 14% Off-the-beaten path attractions
- 13% Availability of direct flight service
- 13% Ways to experience nature
- 13% Transportation and how to get around
- 12% Snow/winter activities (skiing, sledding, etc.)
- 12% Outdoor activities (biking, boating, hiking, etc.)
- 11% Ideas for adventurous travel
- 10% Sample trip itineraries
- 10% Things to do outside the large cities
- 9% Touristy attractions to avoid
- 9% Professional sporting events
- 8% Ways to experience the American lifestyle
- 7% Level of crowds

Source: Future Partners (2025)

# MEXICO

---

Recall of “Buzz”: Travel South  
Destinations

43%

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 (2025)

# 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

---



1 Trip

---

47%

2 Trips

---

30%

3-4 Trips

---

14%

5+ Trips

---

8%

2.2

Average Number of Leisure  
International Trips

Note: Mexican 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)

# MEXICO

---



1.4

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

1+ Trips

---

57%

1 Trip

---

28%

2 Trips

---

12%

3+ Trips

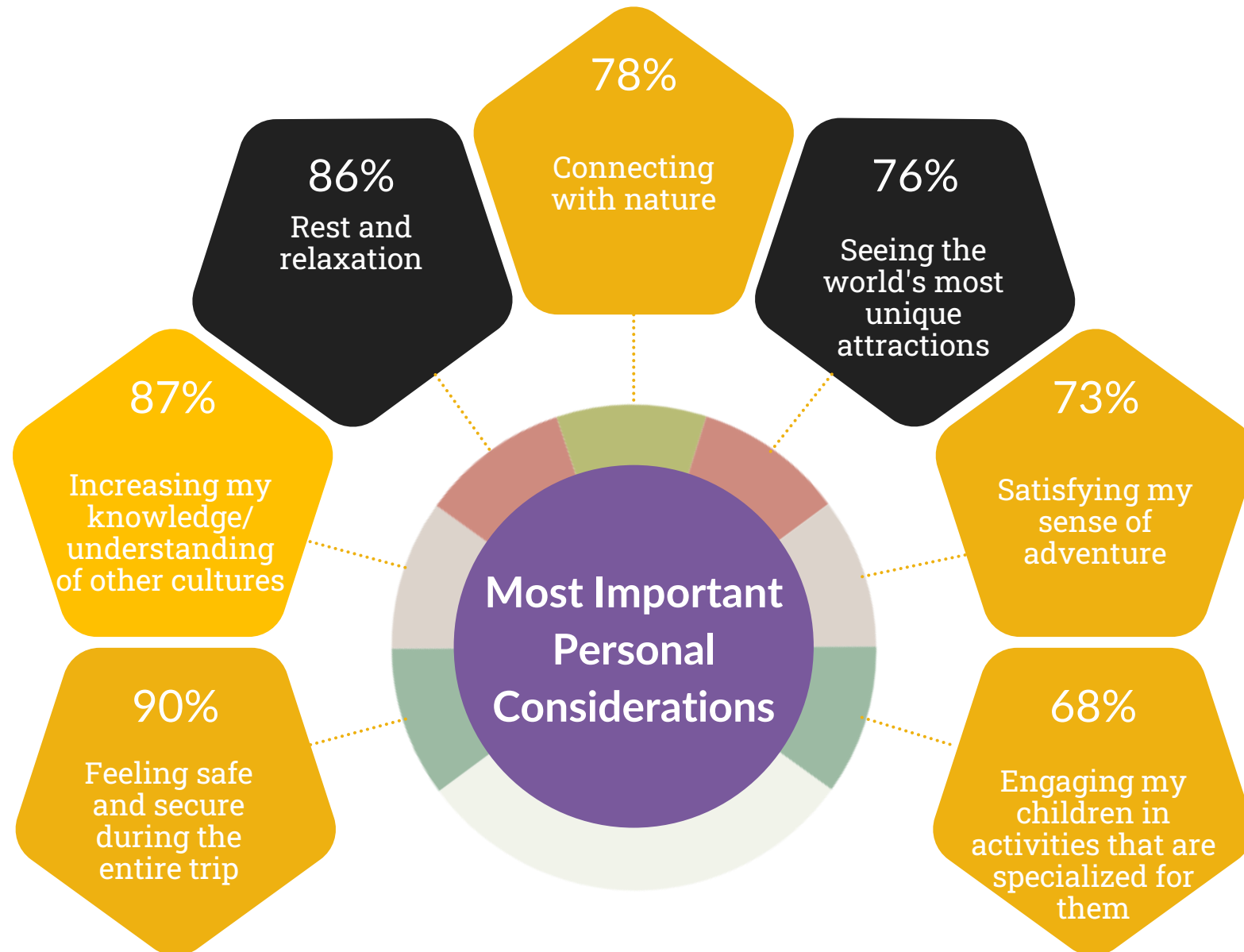
---

17%

Note: Mexican 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)

# MEXICO



Note: Mexican 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)

# MEXICO

## Most Important When Choosing a Destination

- 89%** Accommodation options
- 85%** Landmarks and sightseeing options
- 84%** Appeal of local culture
- 82%** Natural features/landscapes
- 80%** Climate or weather at the destination
- 79%** Leisure attractions
- 77%** Ease of travel to the destination
- 76%** Beaches/coastal activities

## Most Discouraging From Visiting a Destination

- 57%** Uncleanliness in the destination
- 53%** High prices
- 51%** Personal safety concerns
- 45%** Lack of information for planning trip & at destination
- 39%** Lack of environmental responsibilities
- 37%** Political climate not aligning with personal views
- 35%** Inconvenience of travel to the destination
- 32%** Visa requirements/entry procedures

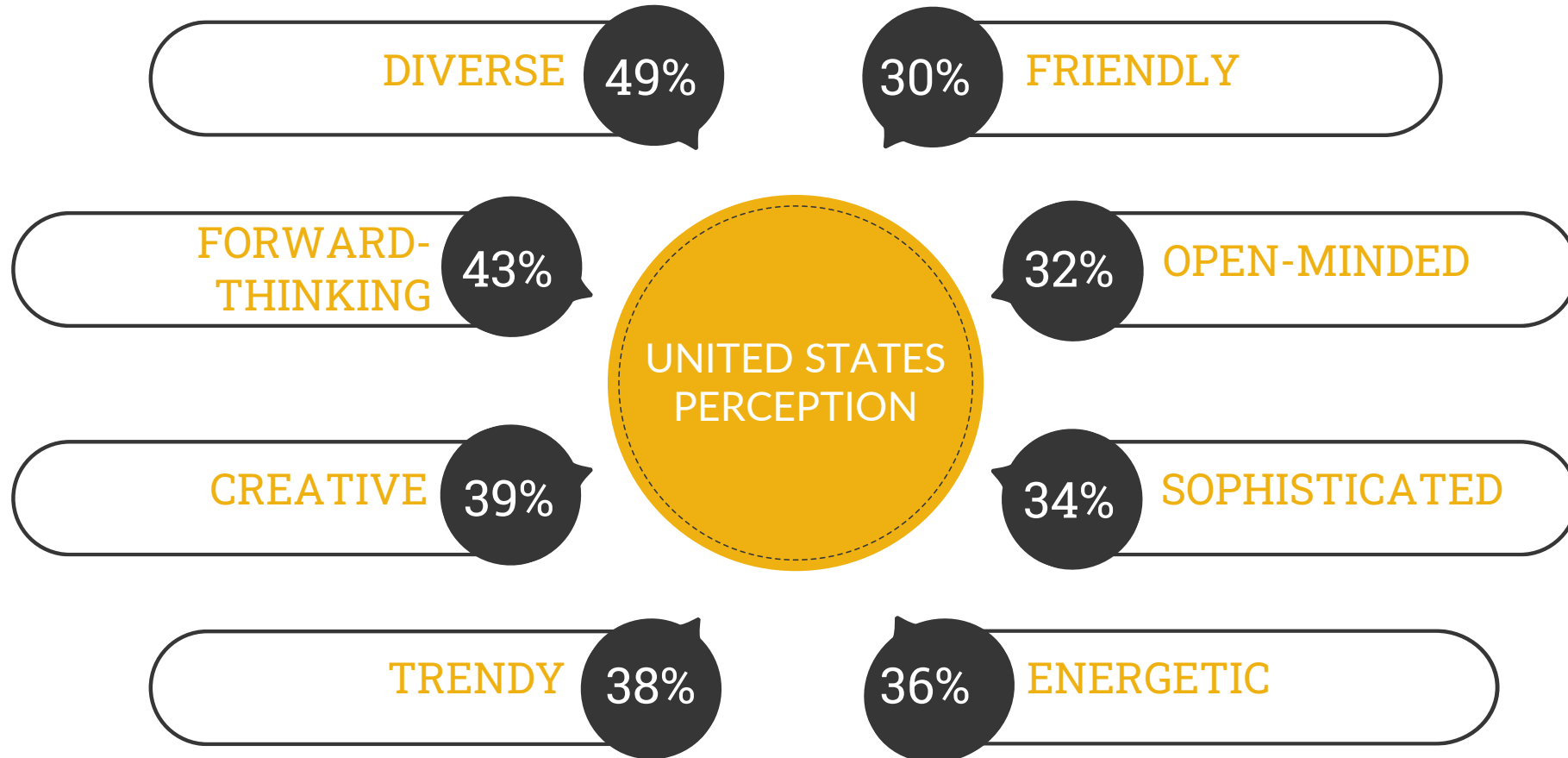
Note: Mexican visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)



# MEXICO

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Note: Mexican 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)

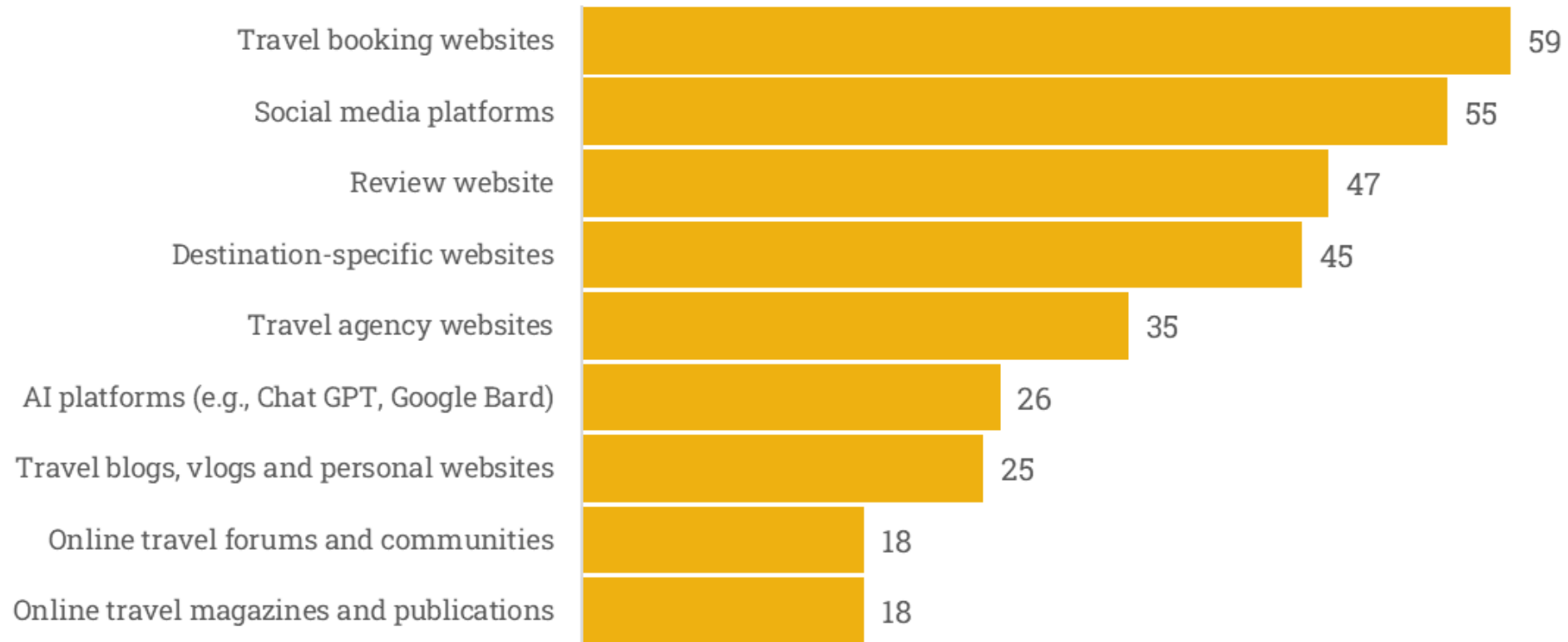
## Sources of Information for Destination Selection (%)



Note: Mexican 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: Mexican 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

Instagram	80%
Facebook/META	79%
YouTube	77%
Tik Tok	75%
Twitter/X	50%
Pinterest	38%
LinkedIn	29%
Snapchat	26%
Reddit	18 %
Tumblr	9 %

Note: Mexican 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)

# MEXICO

---

## Likelihood of how 2025 will evolve:

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

56%

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

53%

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

52%

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

51%

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

50%

Global wars/strife will impact the destinations visited in 2025

# Resources



# Market Profiles

## Global Partner Program

