

TRAVEL SOUTH  USA

GEORGIA

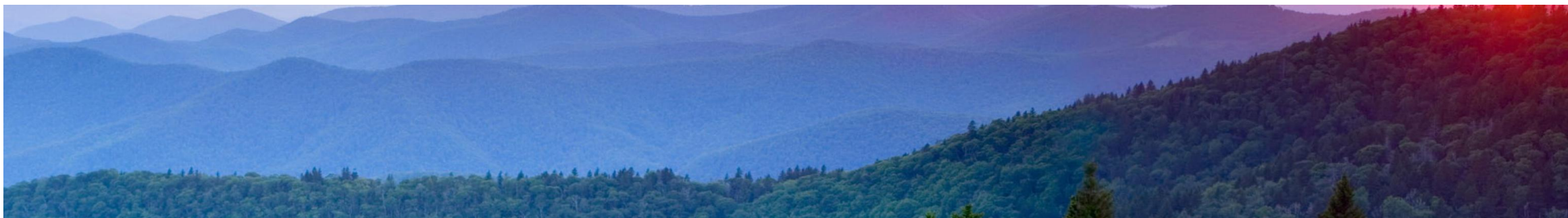
EXPLORE  
GEORGIA.  
USA

**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

## **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 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

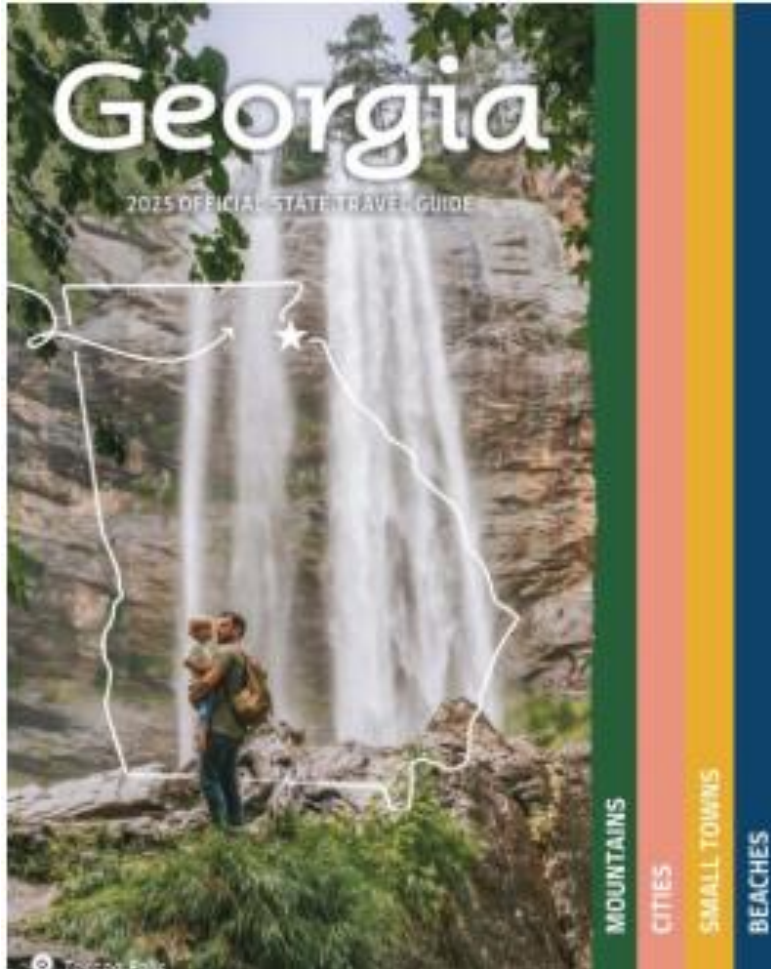
## **Resources**

Links to Market Profiles, along with other Travel South resources

# Georgia's International Visitor Economy



## *Highlighting the State's Global Interconnectivity*



### Outlook

- By 2025, forecasted to reach **\$1.7 billion** and **1.2 million visitors**

### US Inbound Travel Rebound – Key Markets

- International inbound spending is expected to decline by 5% from 2024, an 8% decrease compared to 2019.
- **Japan, India and Brazil are projected to grow** in 2025, with **Sweden** remaining flat.
- Fueled by visitors from **Canada, United Kingdom/Ireland, DACH Region, India, South Korea, Brazil, China, France, Australia, and Benelux**, accounting for **58%** of the state's 2023 international tourism expenditures

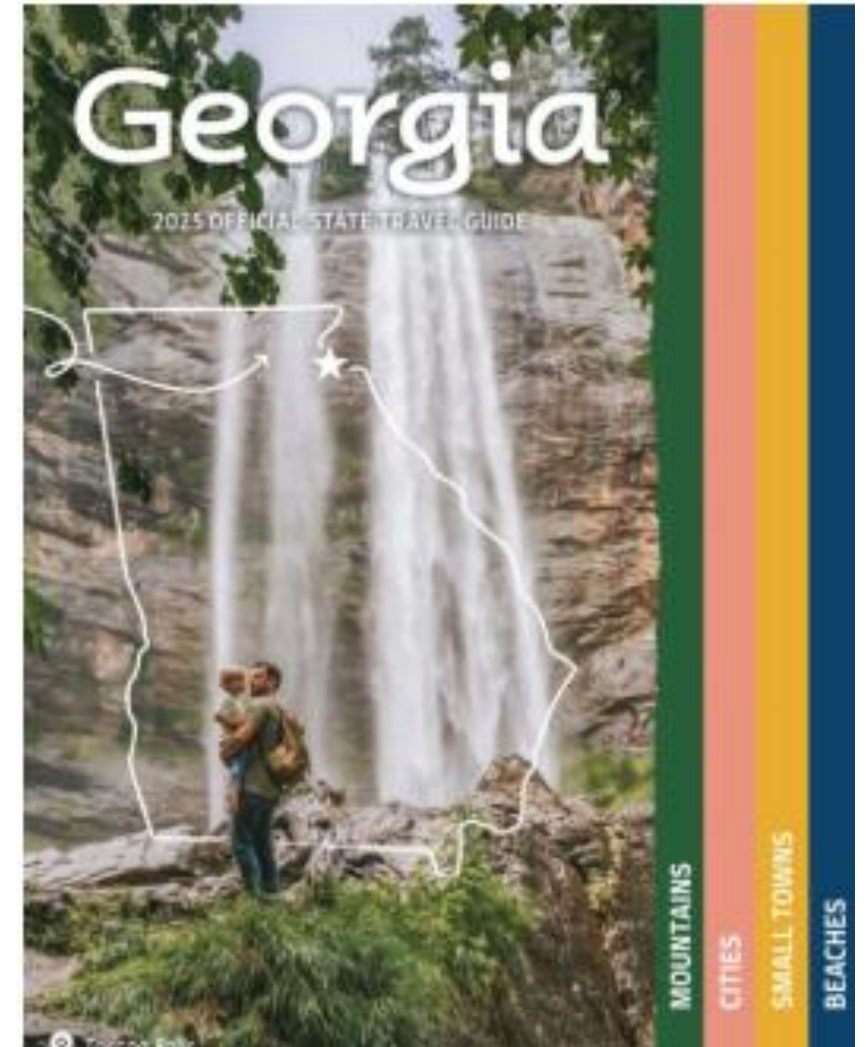
### Exports by Market

- **11,000** companies exported **\$53 billion** worth of goods
- Exports to **Canada, Mexico, China, Germany and Benelux** are among the top origin markets of visitation
- **China and India** account for half of the international student population
- **78%** of visits are non-business related

# Georgia's International Visitor Economy

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

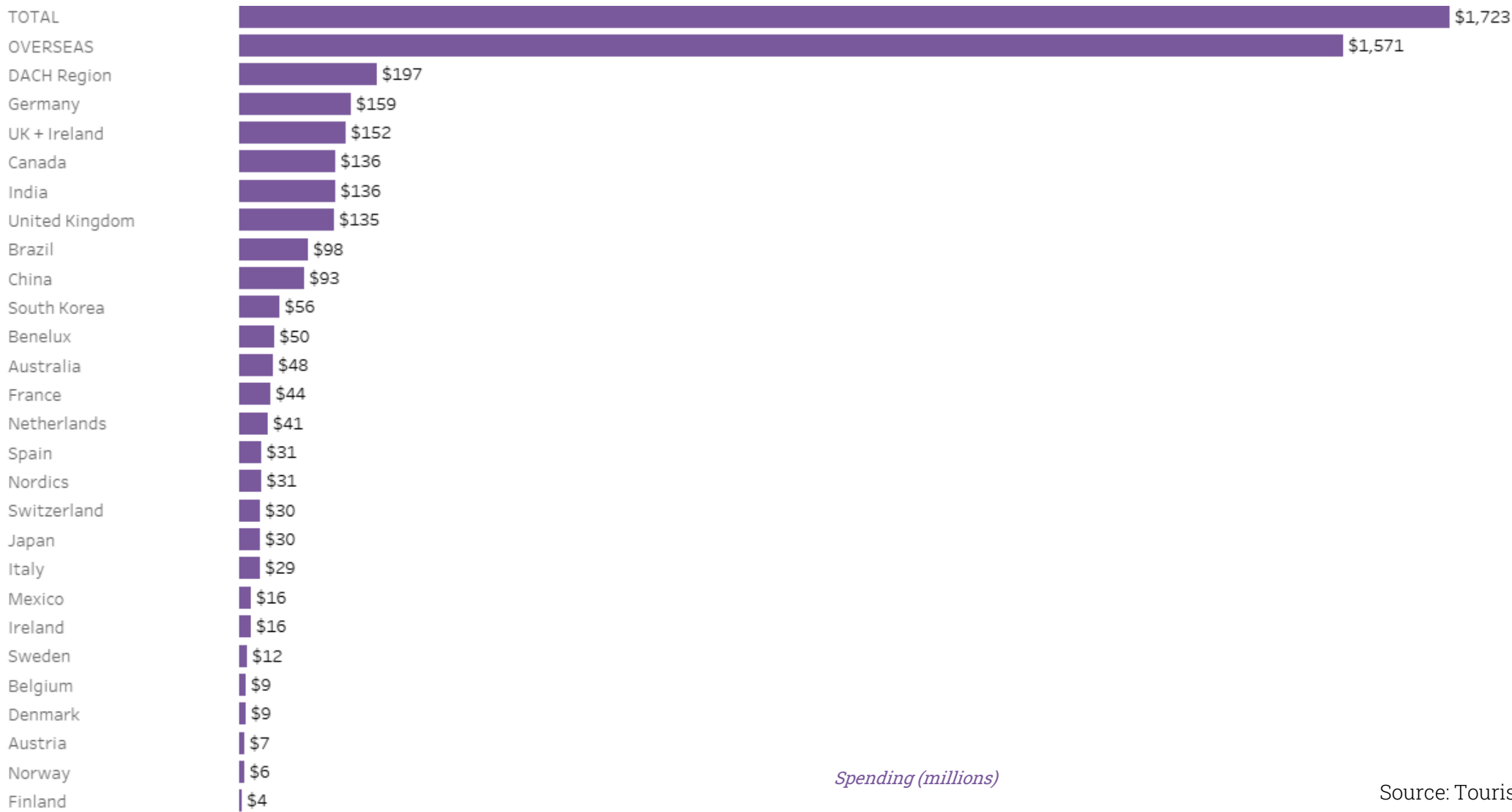
- Georgia's investment in regional marketing amplifies the state's brand internationally and targets high-value travelers, enhancing regional economies and diversifying the visitor economy.
- Collaborative marketing efforts under Travel South USA (TSUSA) further strengthen Georgia's strategic advantage.
- The Hartsfield-Jackson Atlanta International Airport, the world's busiest airport, allows easy access to the state.
- Proximity to neighboring states— Alabama, North Carolina, South Carolina, and Tennessee—attracts international travelers interested in the Travel South's natural beauty, cultural heritage, and connectivity, thus enriching Georgia's tourism landscape.



# Visitor Economy

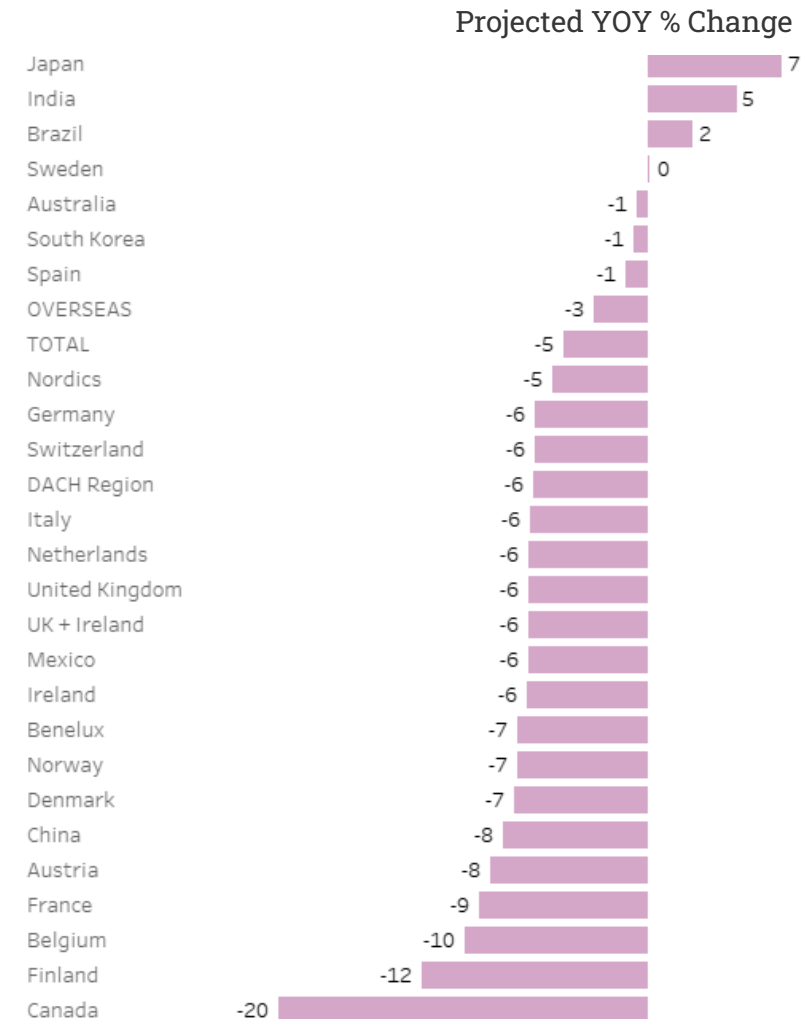
*April 15, 2025*

# 2025 Outlook: Visitor Spending by Key Markets

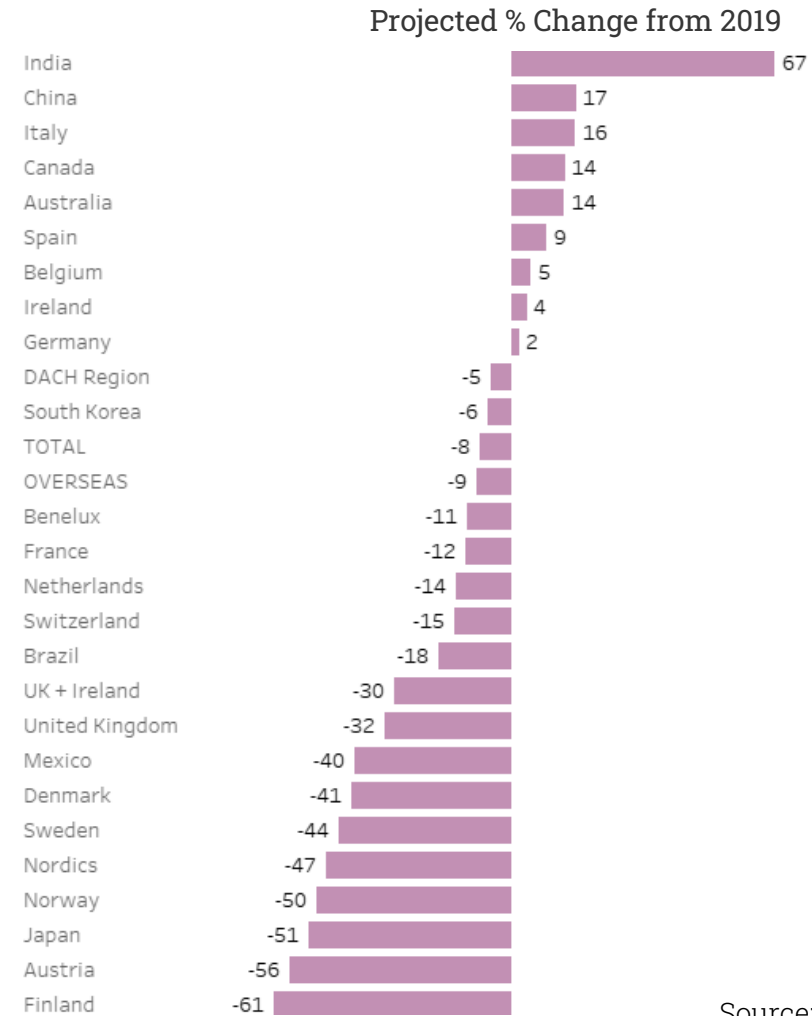


Spending (millions)

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

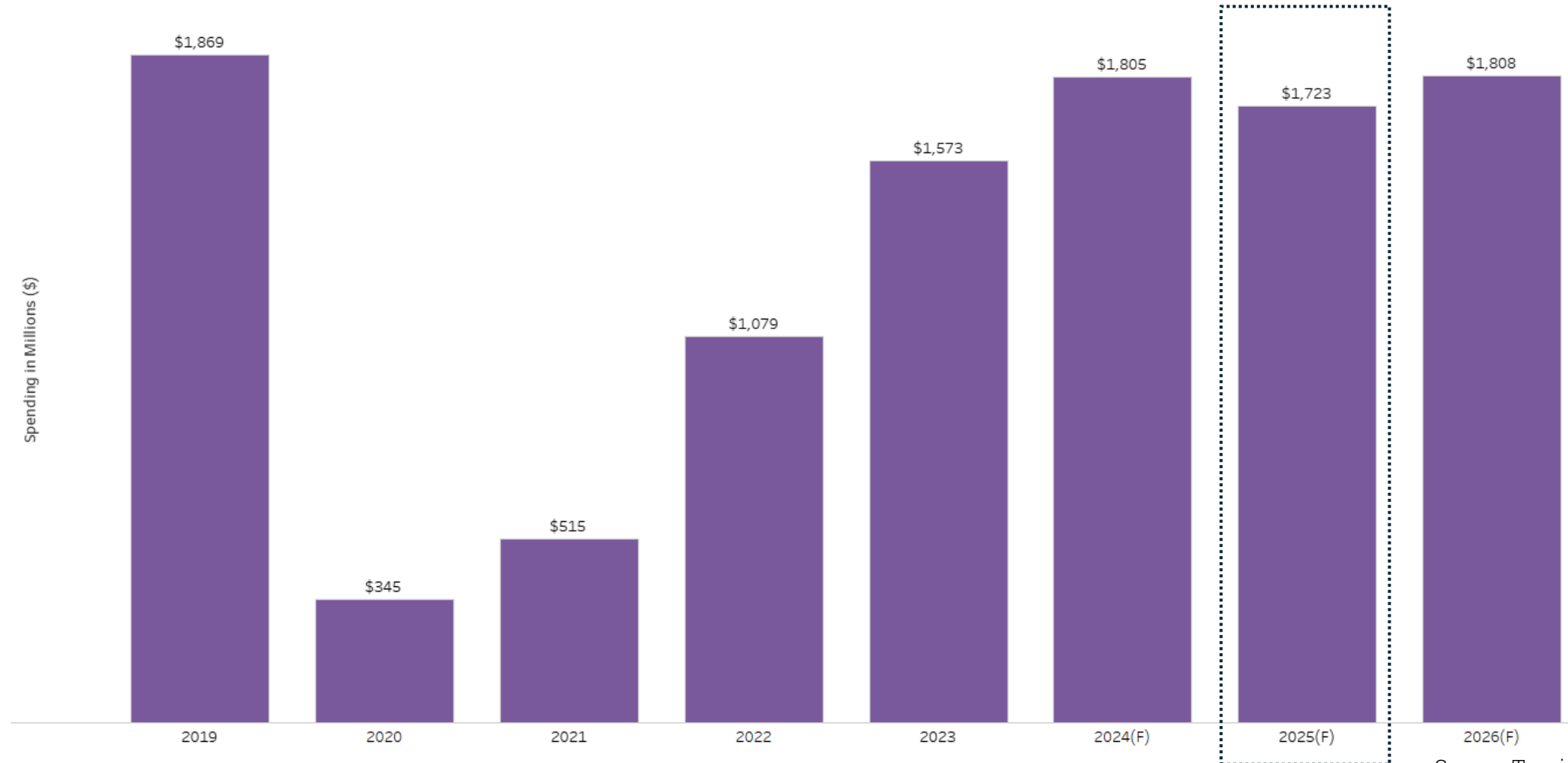


# 2019 Baseline Comparison



# GEORGIA

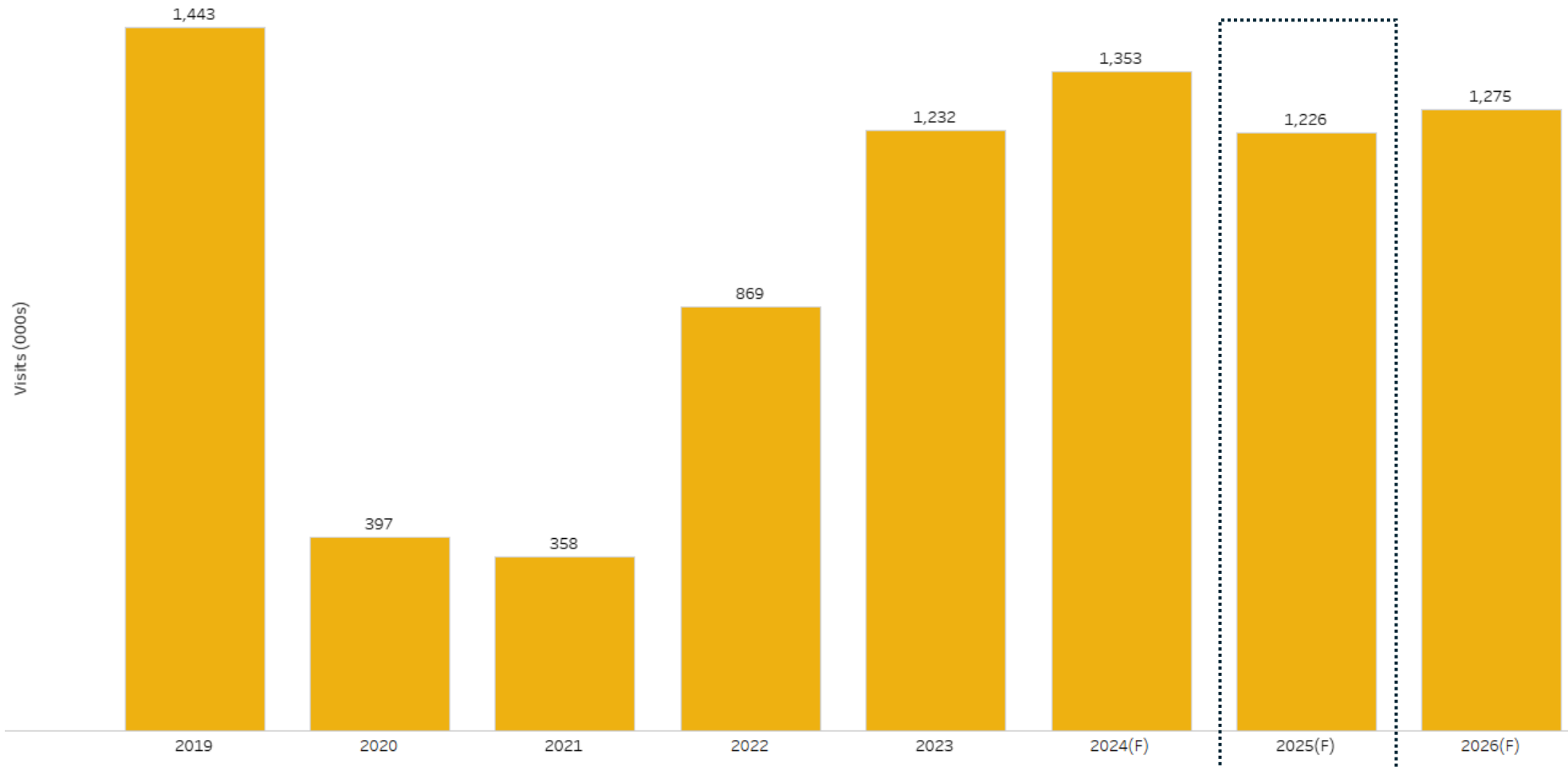
2025 Spending Outlook: Down 5% from 2024, still below 2019



# GEORGIA



2025 Visitor Volume Outlook: Down 9% from 2024, still below 2019



# GEORGIA

## \$1.7B Projected Spend and 1.2 million Visits in 2025, down 5% and 9% from 2024

- Tourism Economics estimates **Overseas spending** to decline by **3%** year-over-year (yoy) in **2025** – **Canada, a 20% decline**
- Japan, India and Brazil** are projected to grow in 2025, with **Sweden** remaining flat
- DACH Region, U.K./Ireland, Canada, India and Brazil** 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	1,723		-5	1,226	-9	-8	-15
OVERSEAS	1,571		-3	878	-5	-9	-9
DACH Region	197		-6	99	-7	-5	-24
Germany	159		-6	84	-7	2	-21
UK + Ireland	152		-6	91	-7	-30	-28
Canada	136		-20	297	-21	14	-29
India	136		5	103	1	67	74
United Kingdom	135		-6	82	-8	-32	-27
Brazil	98		2	42	-3	-18	-8
China	93		-8	38	-7	17	-24
South Korea	56		-1	23	-2	-6	-29
Benelux	50		-7	34	-8	-11	-25
Australia	48		-1	18	-2	14	-18
France	44		-9	31	-10	-12	-23
Netherlands	41		-6	28	-8	-14	-26
Spain	31		-1	18	-5	9	-25
Nordics	31		-5	18	-6	-47	-49
Switzerland	30		-6	10	-6	-15	-34
Japan	30		7	22	7	-51	-34
Italy	29		-6	21	-8	16	4
South Africa	24		3	10	0	-17	-34
Argentina	20		7	12	3	22	8
Mexico	16		-6	51	-8	-40	-6
Ireland	16		-6	9	-6	4	-35

# GEORGIA

## 1.7B Projected Spend and 1.2 million Visits in 2025 (cont.)

Market	Spending (\$M)	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
Egypt	14	-7	6	-6	-65	-39
Philippines	14	0	9	1	27	56
Poland	14	2	8	-4	50	57
Ukraine	12	6	2	4	36	-58
Sweden	12	0	8	-3	-44	-50
Taiwan	12	16	10	9	-37	23
Turkiye	10	2	5	-1	59	-2
Israel	10	11	7	7	-13	18
Singapore	10	2	5	2	14	7
Belgium	9	-10	6	-9	5	-20
Denmark	9	-7	5	-10	-41	-46
Morocco	8	-6	4	-4	-7	-19
Austria	7	-8	4	-9	-56	-39
Norway	6	-7	4	-5	-50	-47
Portugal	6	-4	4	-5	-24	-19
Czech Republic	6	-9	3	-10	14	-5
Indonesia	5	-7	2	-4	50	32
Russia	4	8	2	8	-74	-74
Vietnam	4	2	4	2	-33	80
Thailand	4	-2	2	0	4	-10
Finland	4	-12	2	-8	-61	-56
Hungary	4	-1	2	-3	-33	-19
United Arab Emirates	3	-1	2	1	-48	-39
Malaysia	3	1	2	0	-27	-22
Greece	3	-5	2	-7	-50	-34
Hong Kong	3	-3	2	-1	-34	-12
Saudi Arabia	3	0	2	1	-60	-64
Croatia	2	-4	1	-2	67	40
Bulgaria	2	5	1	1	-24	-2
Iran	1	-60	0	-60	-19	-64

# GEORGIA

## Visitor Spending 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending (\$M)	TOTAL	\$1,869	\$345	\$515	\$1,079	\$1,573	\$1,805	\$1,723
	OVERSEAS	\$1,722	\$311	\$488	\$977	\$1,391	\$1,618	\$1,571
	DACH Region	\$208	\$25	\$28	\$155	\$203	\$209	\$197
	UK + Ireland	\$216	\$27	\$22	\$126	\$151	\$162	\$152
	Canada	\$120	\$25	\$14	\$87	\$167	\$169	\$136
	India	\$81	\$19	\$25	\$69	\$99	\$130	\$136
	Brazil	\$120	\$22	\$21	\$69	\$82	\$95	\$98
	China	\$80	\$20	\$24	\$16	\$52	\$101	\$93
	South Korea	\$60	\$15	\$36	\$27	\$45	\$57	\$56
	Benelux	\$56	\$7	\$9	\$39	\$48	\$53	\$50
	Australia	\$42	\$6	\$2	\$24	\$39	\$48	\$48
	France	\$49	\$7	\$12	\$33	\$42	\$48	\$44
	Spain	\$28	\$4	\$7	\$26	\$30	\$31	\$31
	Nordics	\$58	\$9	\$6	\$30	\$32	\$32	\$31
	Japan	\$61	\$10	\$6	\$15	\$27	\$28	\$30
	Italy	\$25	\$3	\$6	\$17	\$26	\$31	\$29
	Mexico	\$27	\$9	\$13	\$14	\$15	\$18	\$16

# GEORGIA

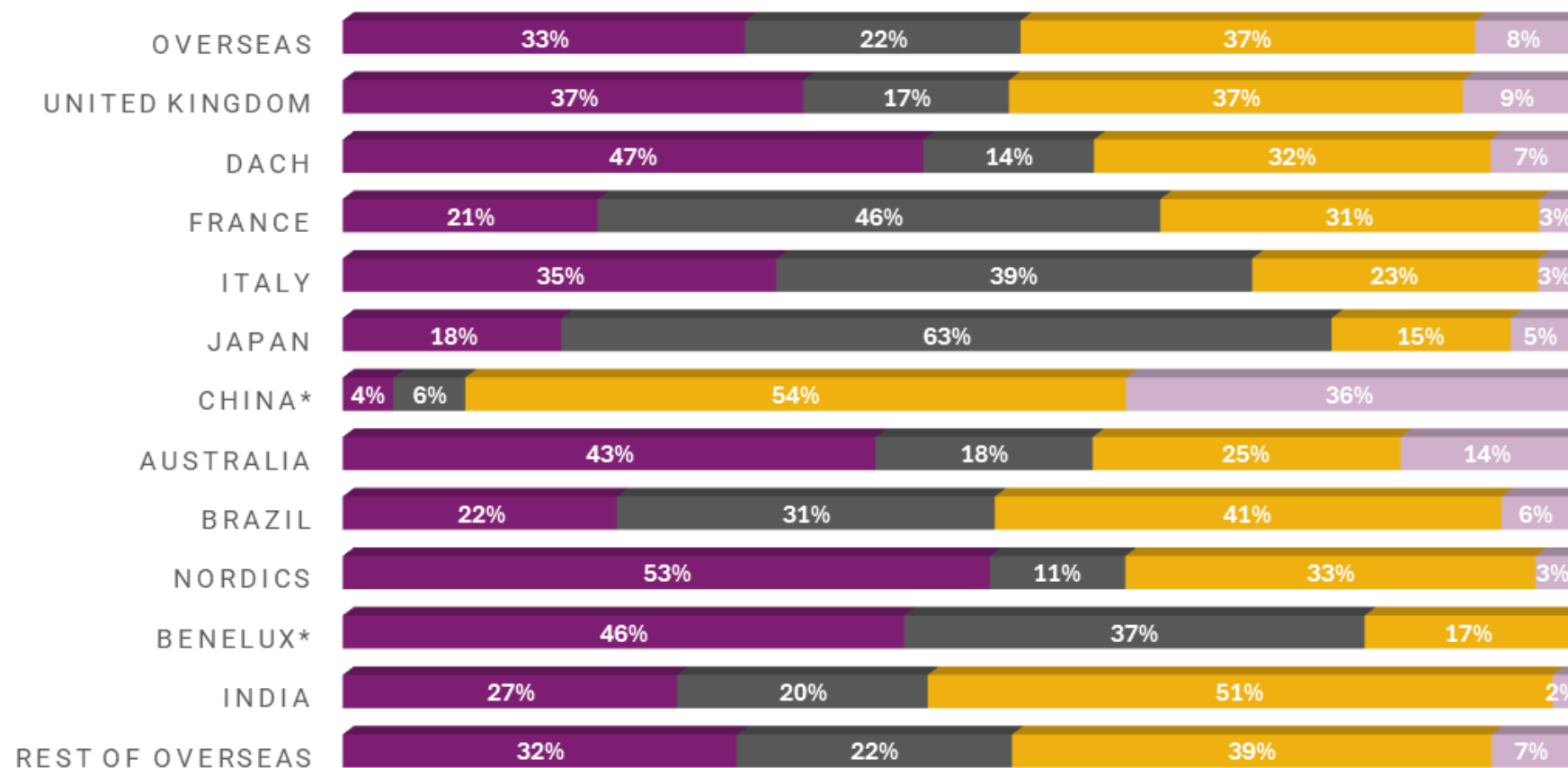
## Visits 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Visits (000s)	TOTAL	1,443	397	358	869	1,232	1,353	1,226
	OVERSEAS	969	272	272	598	814	919	878
	Canada	419	99	55	230	370	377	297
	India	59	15	18	54	78	102	103
	DACH Region	130	31	21	84	104	107	99
	UK + Ireland	126	27	17	77	91	98	91
	Mexico	55	25	31	42	48	56	51
	Brazil	46	13	8	29	36	43	42
	China	50	9	5	9	29	41	38
	Benelux	45	19	9	28	35	36	34
	France	40	15	9	25	30	34	31
	South Korea	32	13	7	12	21	23	23
	Japan	34	8	3	8	17	21	22
	Italy	20	5	5	13	19	22	21
	Nordics	36	7	4	17	19	20	18
	Australia	21	4	2	10	16	18	18
	Spain	24	6	7	17	18	18	18

# GEORGIA

## GEORGIA: Purpose of Trip

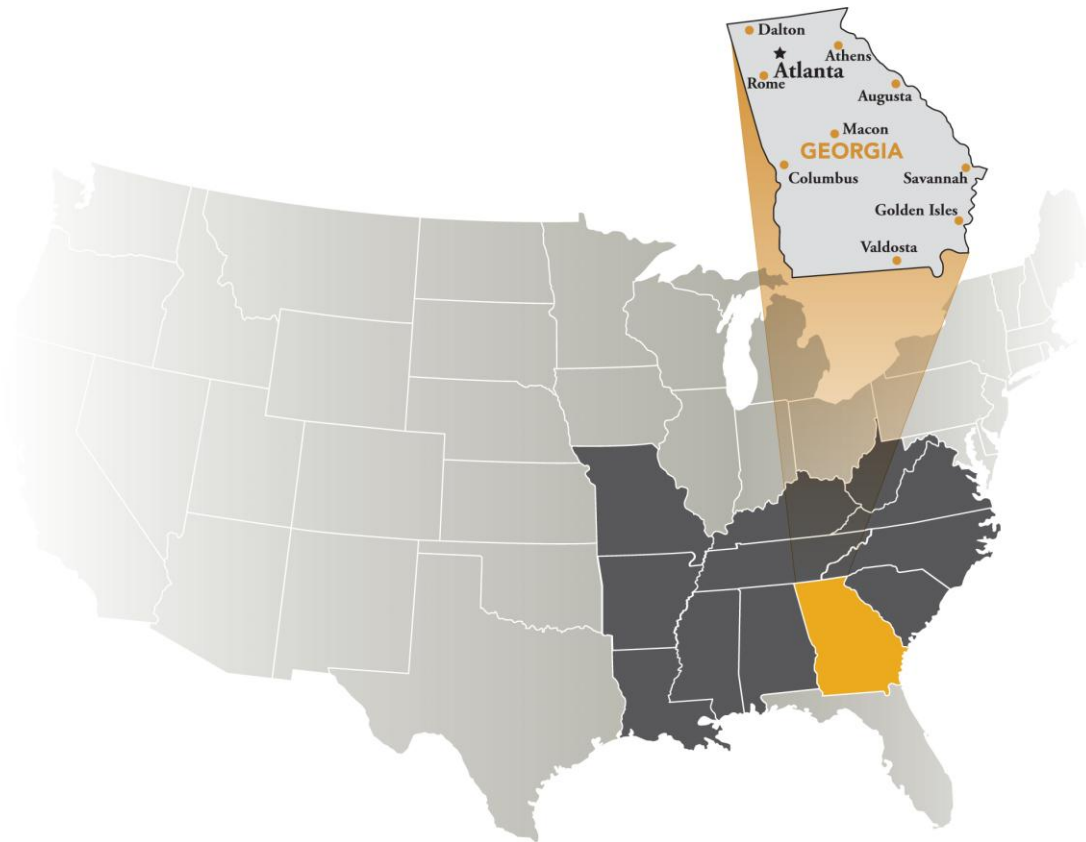
■ Leisure ■ Business ■ VFR ■ Other



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

# Flights

## Hartsfield-Jackson Atlanta International Airport offers nonstop flights to 51 Countries

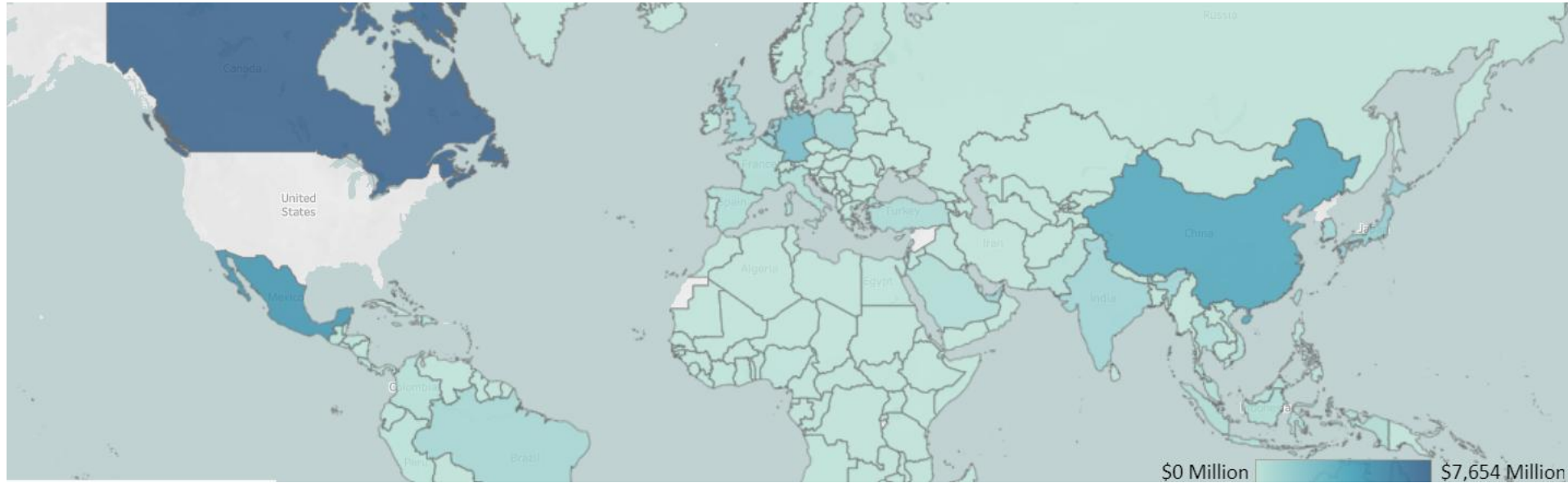


### Non-Stop Flights to Select Key Markets

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London, Manchester, Edinburgh  
Frankfurt, Munich, Stuttgart, Zurich  
Copenhagen  
Paris, Nice  
Amsterdam  
Rome, Milan, Venice  
Barcelona, Madrid  
Toronto, Montreal, Vancouver, Calgary  
Mexico City, Cancun, Monterrey  
Sao Paulo, Rio de Janeiro  
Seoul  
Tokyo

# Exports (Goods)



## EXPORTS IN GOODS *2024*

**\$53 Billion**

## TOP COUNTRIES

CANADA  
MEXICO  
CHINA  
NETHERLANDS  
GERMANY  
SINGAPORE



### Goods Exports by Country

(in millions)

Partner	2024
World	\$53,133
Canada	\$7,411
Mexico	\$6,366
China	\$3,061
Netherlands	\$2,574
Germany	\$2,465
Singapore	\$2,449
Japan	\$1,646
United Kingdom	\$1,441
United Arab Emirates	\$1,418
Poland	\$1,329
Belgium	\$1,198
India	\$1,165
Hong Kong	\$980
South Korea	\$976
New Zealand	\$969

EXPORTERS

10,642

Georgia companies exported goods in 2021

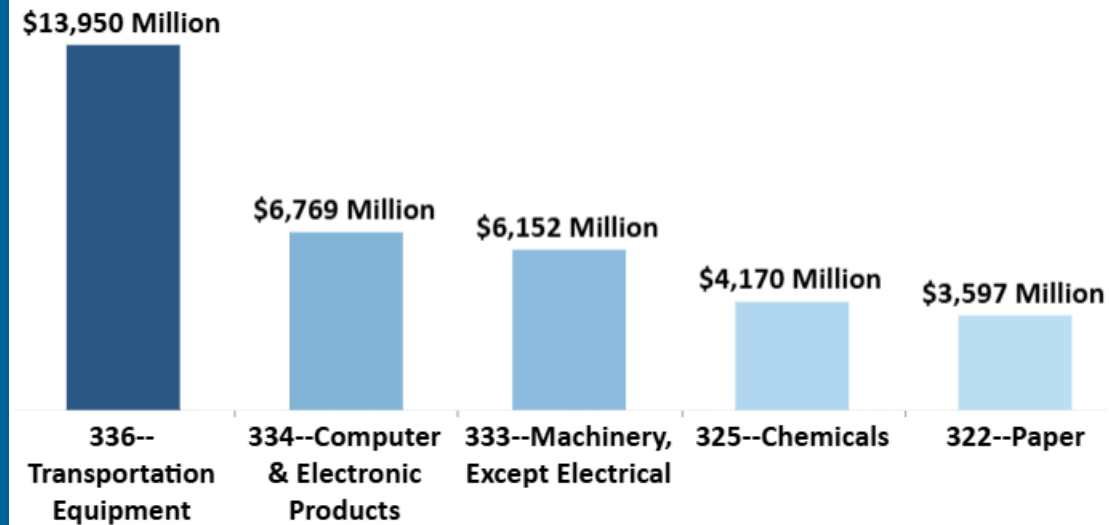
87%

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

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

TOP TRADE SECTORS

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



# International Students

# GEORGIA

INTERNATIONAL  
STUDENTS  
*2022/23*

28,175

STUDENT-VISIT  
RATIO

2.0%

INDEXED  
STUDENT-VISIT  
RATIO  
U.S. = 100

192

## INTERNATIONAL STUDENTS, 2022/23



**26,450**

International Students



**12**

Rank in the United States\*



**5.6**

% Change from  
Previous Year



**\$951,663,054**

Estimated International  
Student Expenditure\*\*

## LEADING PLACES OF ORIGIN

Place of Origin	% Total
China	<b>26.5</b>
India	<b>24.8</b>
South Korea	<b>6.7</b>
Nigeria	<b>3.5</b>
Taiwan	<b>2.0</b>

## LEADING INSTITUTIONS

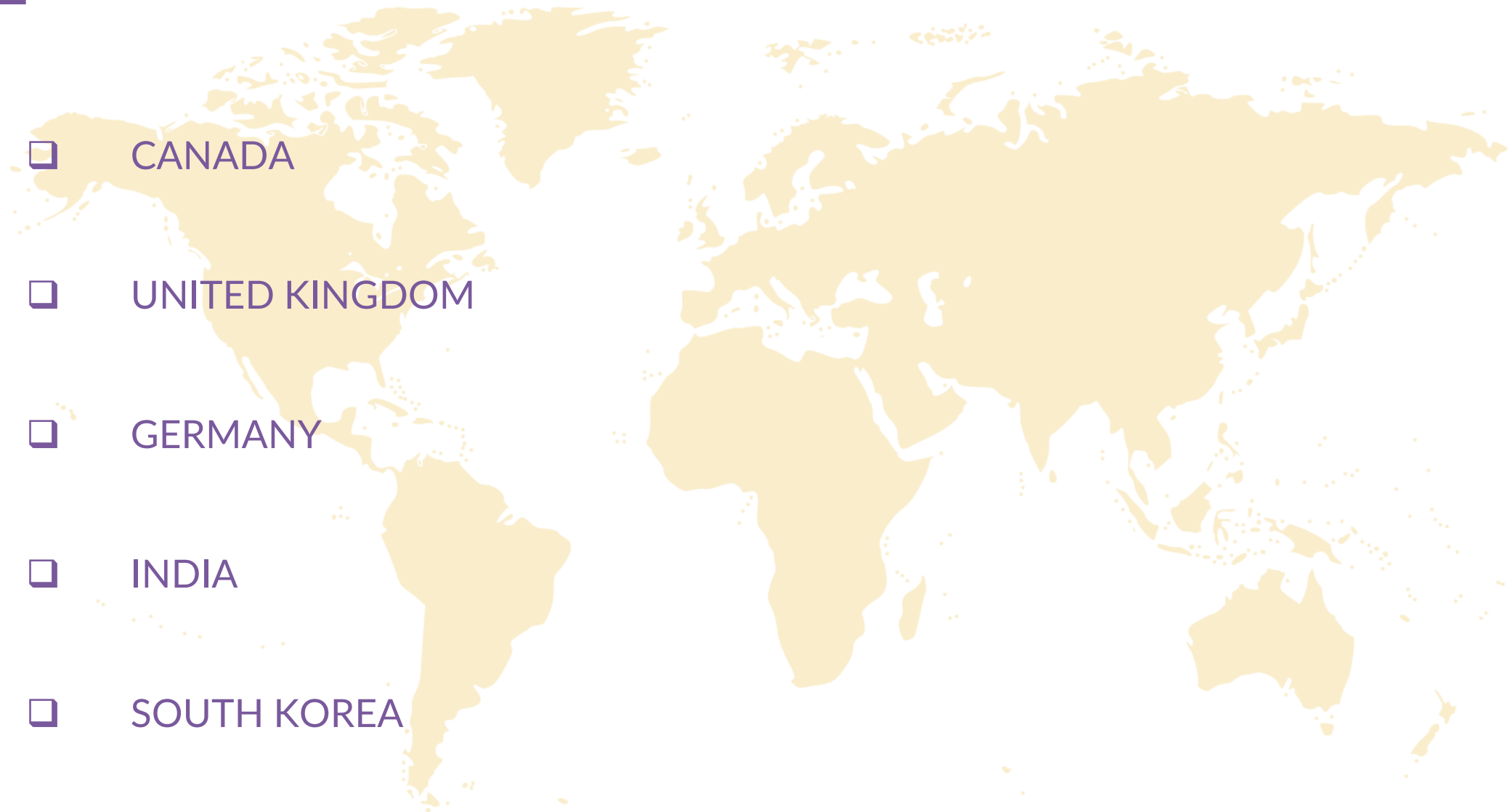
Institution	Total
Georgia Institute of Technology	<b>7,671</b>
Savannah College of Art and Design	<b>4,342</b>
Georgia State University	<b>3,584</b>
Emory University	<b>3,060</b>
University of Georgia	<b>2,541</b>

# Visitor Perception

# MARKET PROFILES

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TRAVEL·SOUTH  USA



# 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
- 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

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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)

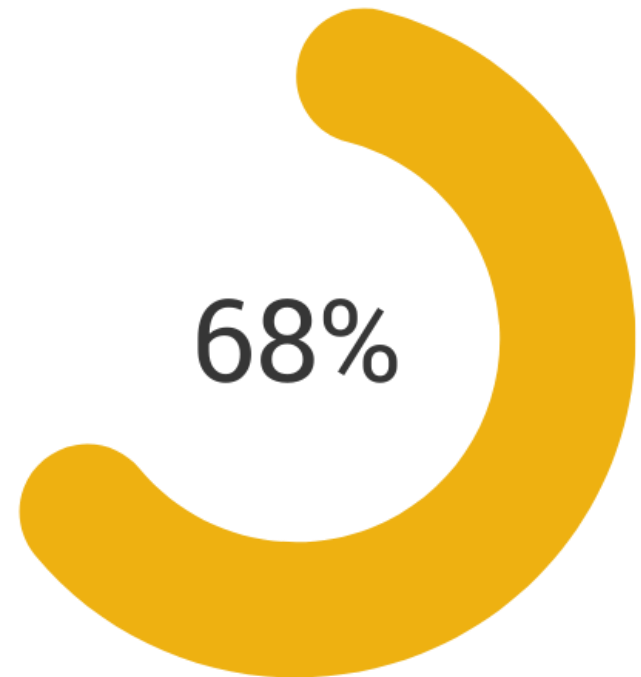
# CANADA

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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

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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



0.5

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

1+ Trips

26%

1 Trip

17%

2 Trips

5%

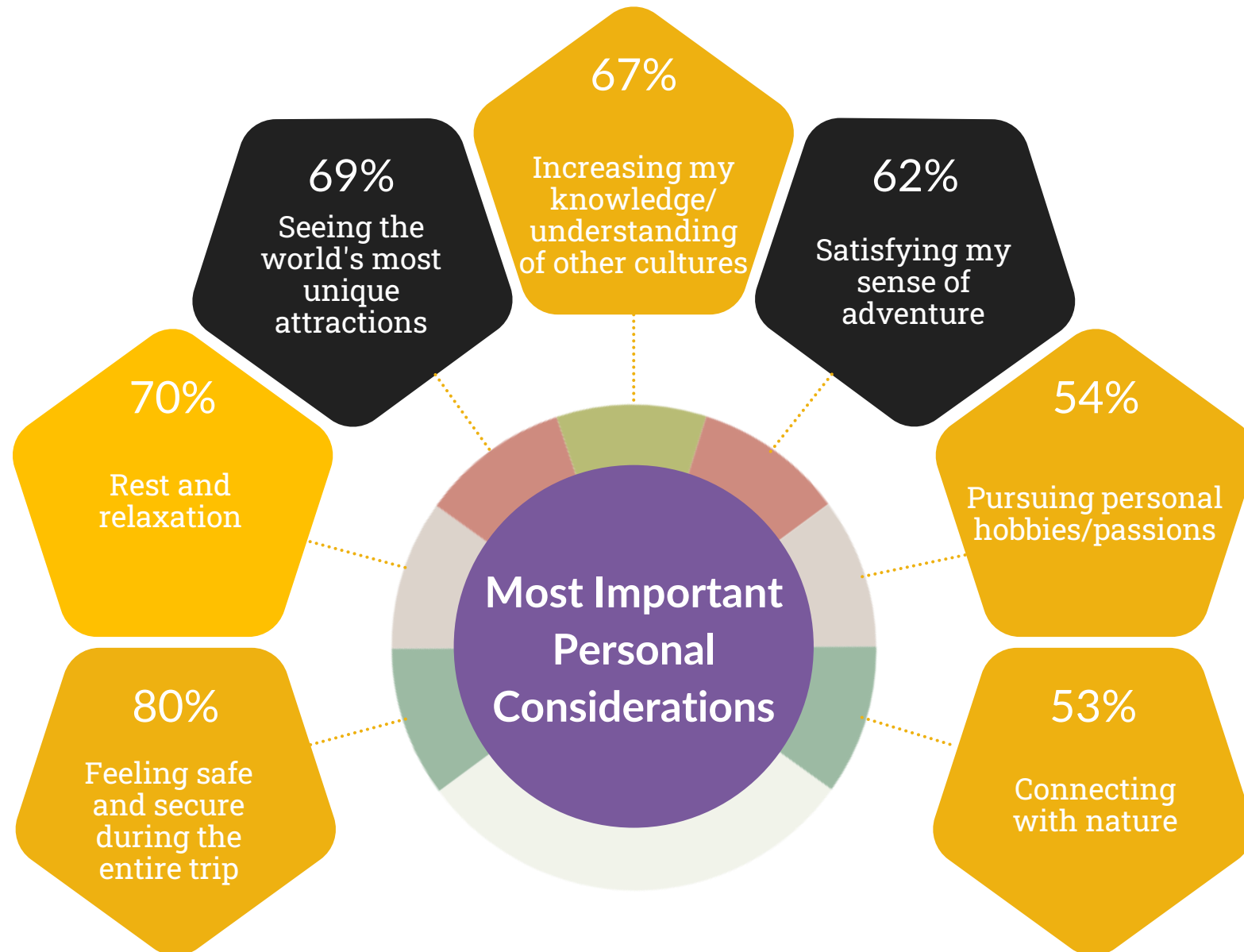
3+ Trips

5%

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

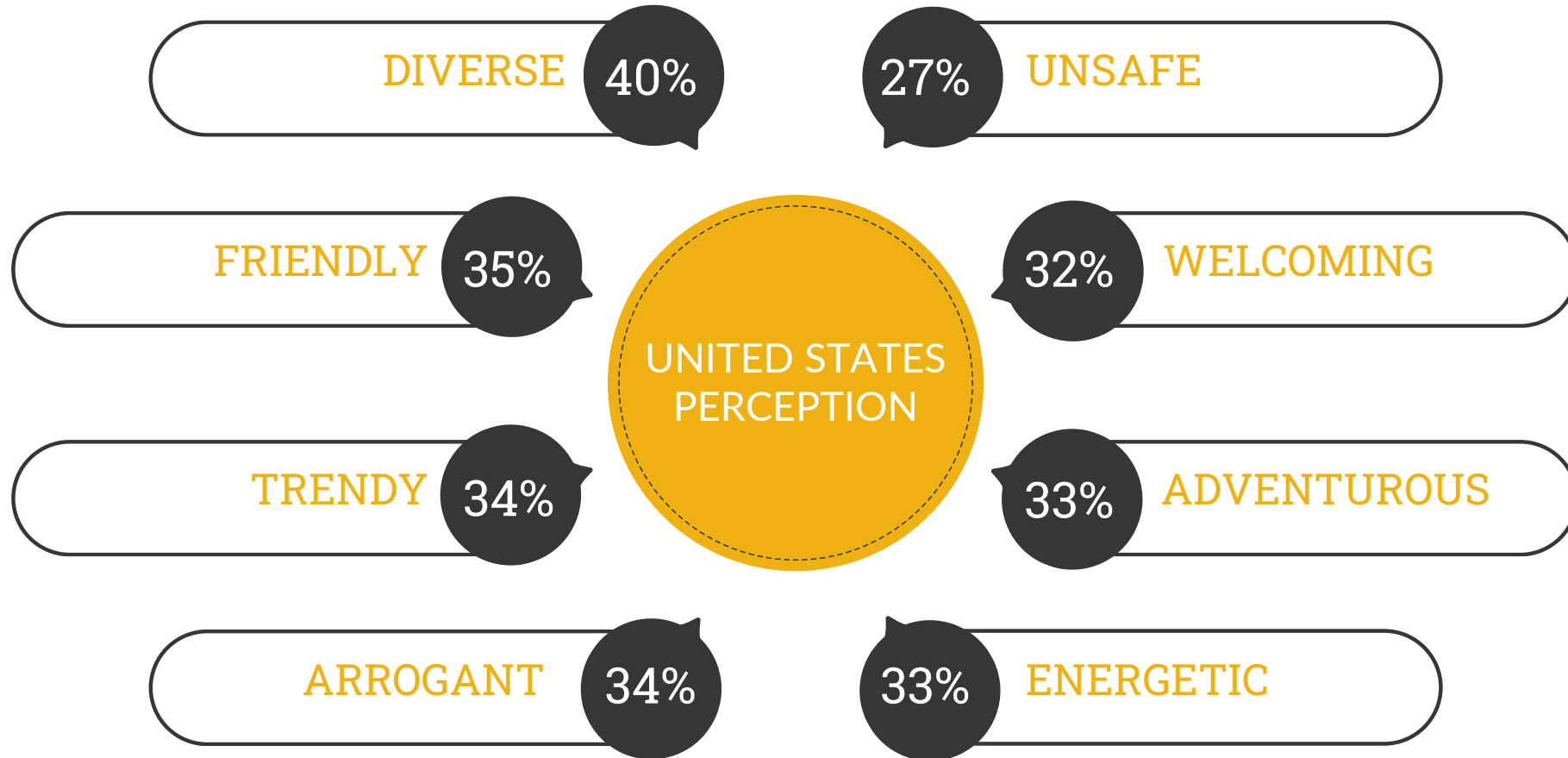
## Most Discouraging From Visiting a Destination

- 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)

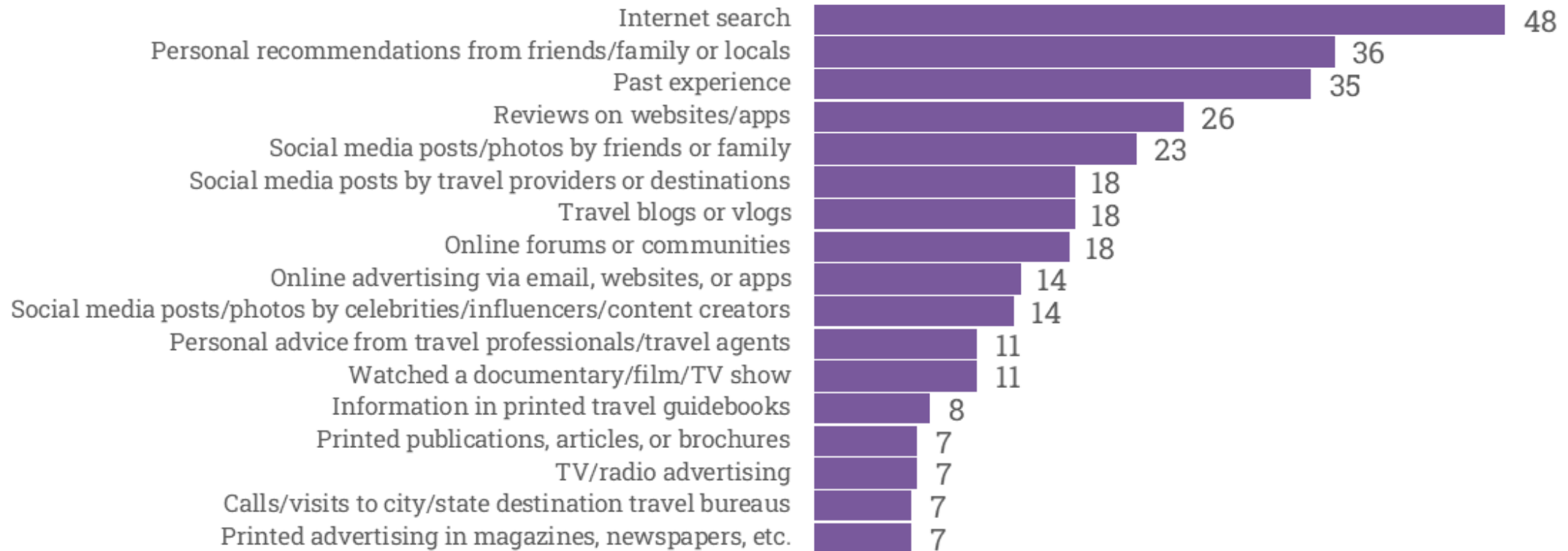
# CANADA



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)

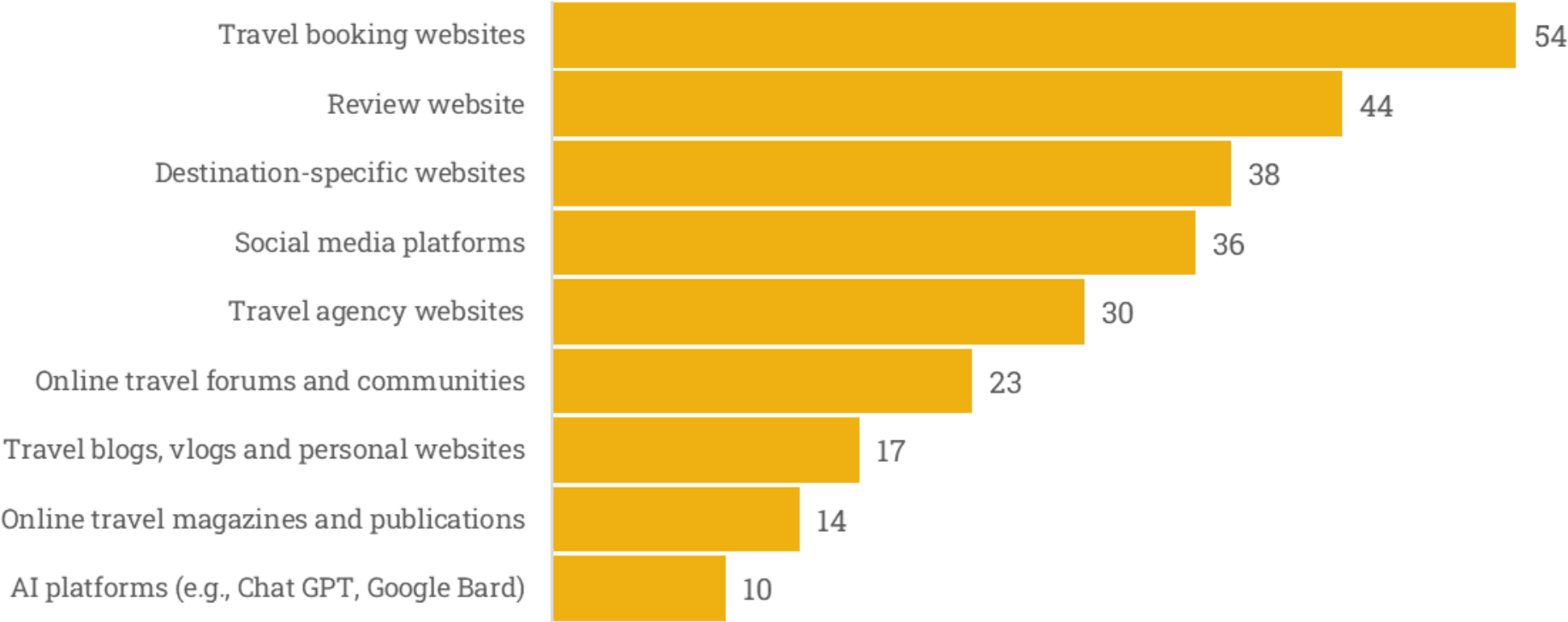
## Sources of Information for Destination Selection (%)



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
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- 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%

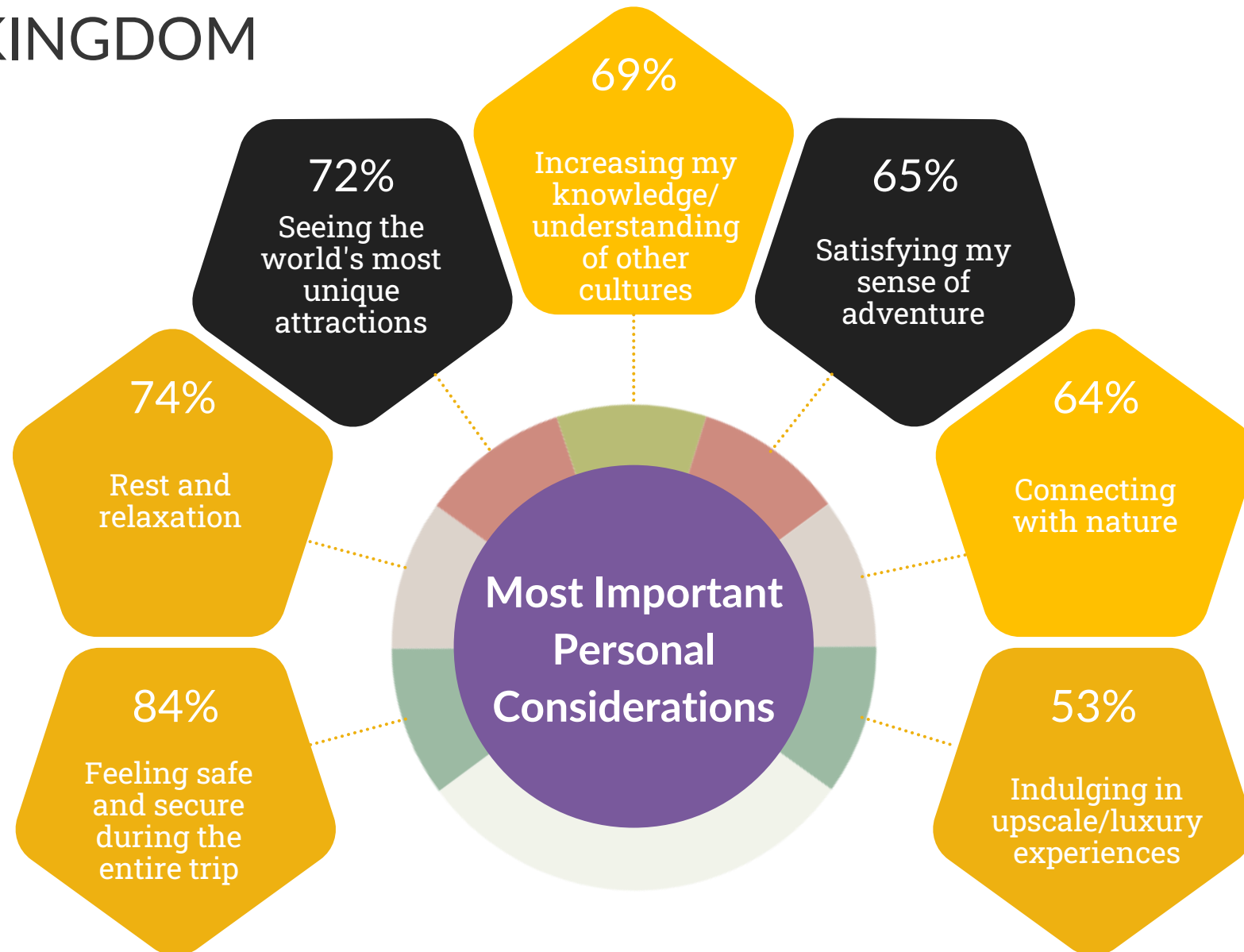
0.7

**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

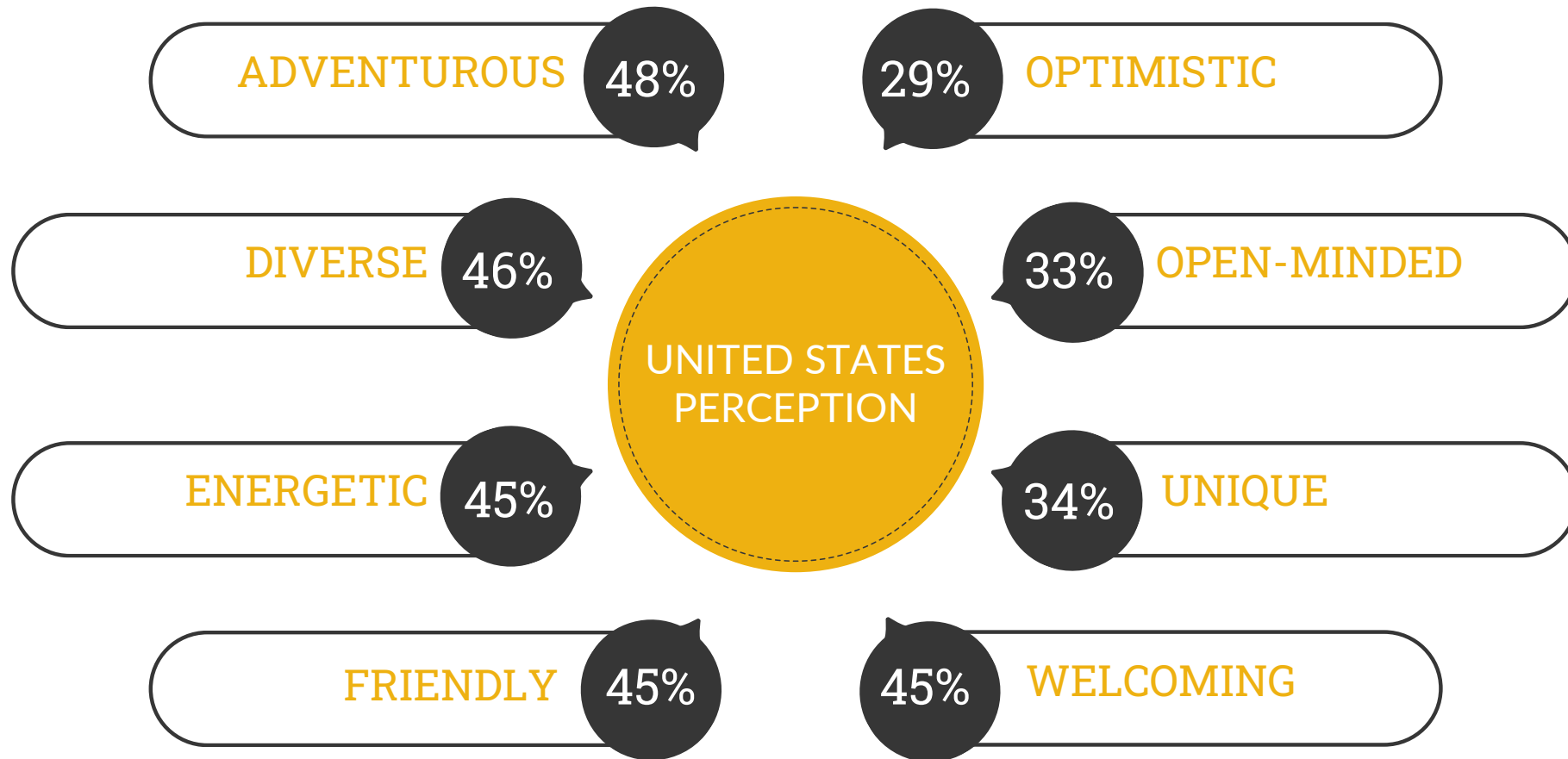
## Most Discouraging From Visiting a Destination

- 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)

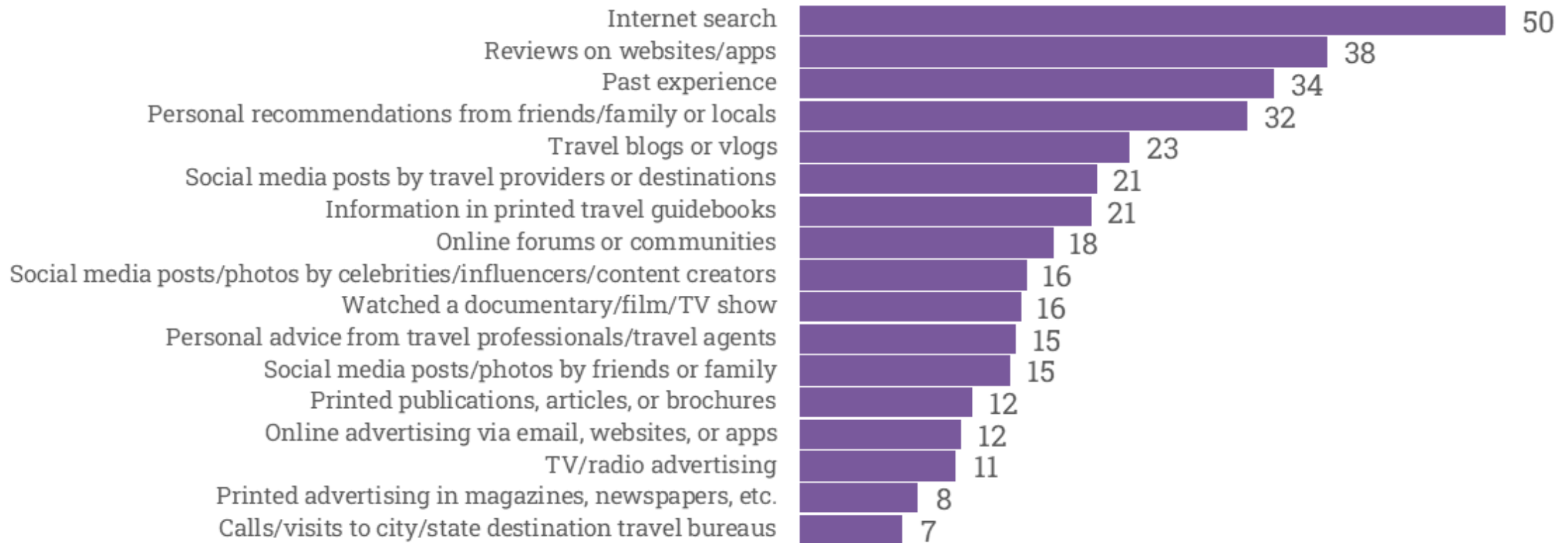
# UNITED KINGDOM



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)

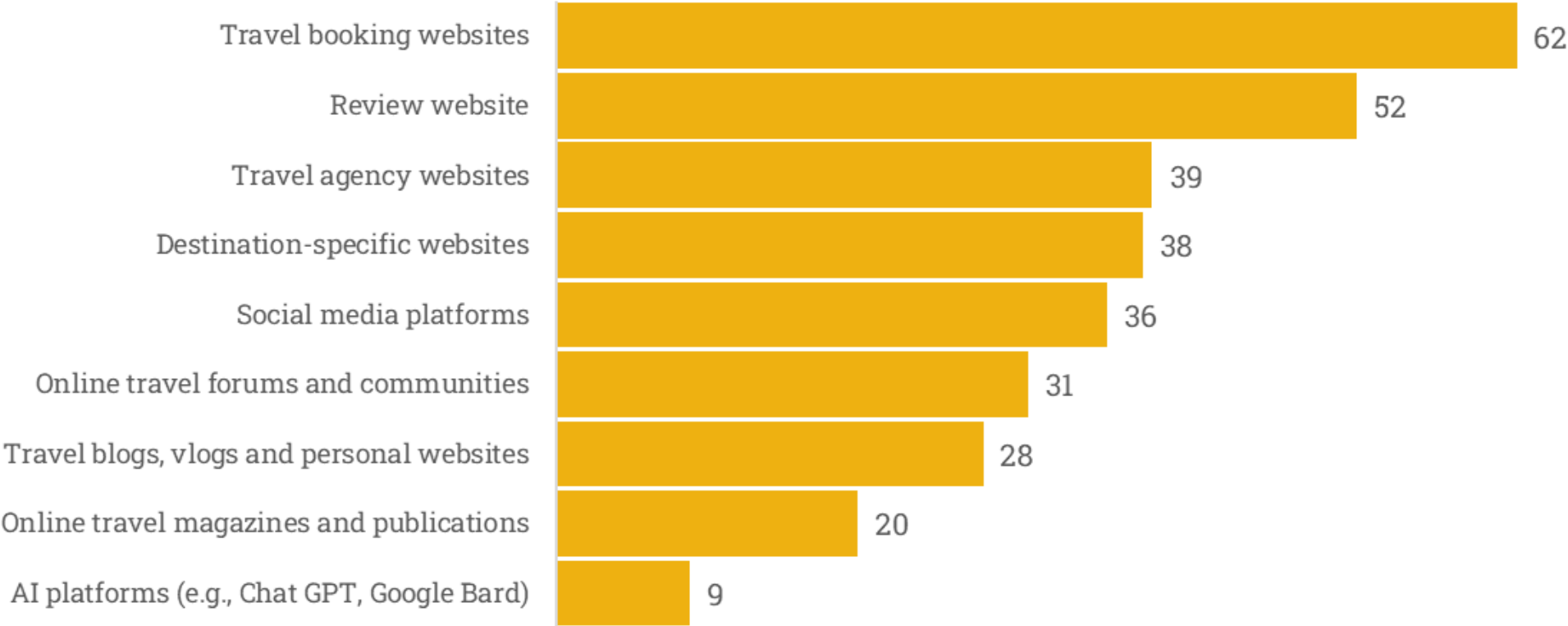
## Sources of Information for Destination Selection (%)



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)

## 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.

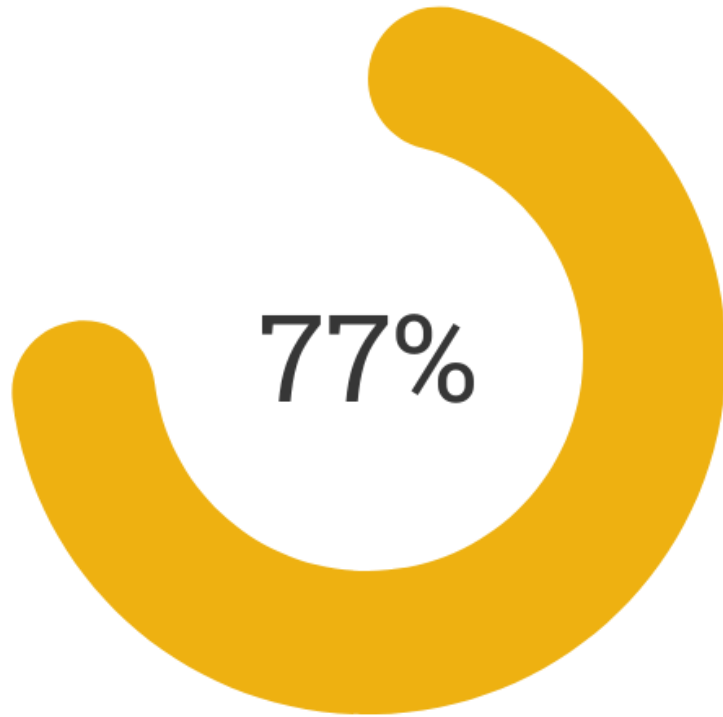


Note: German visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

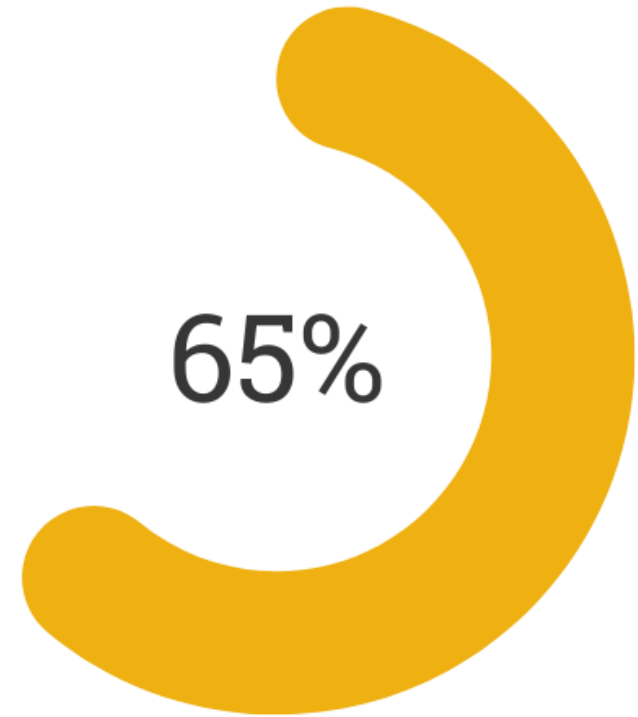
# GERMANY

---



## 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

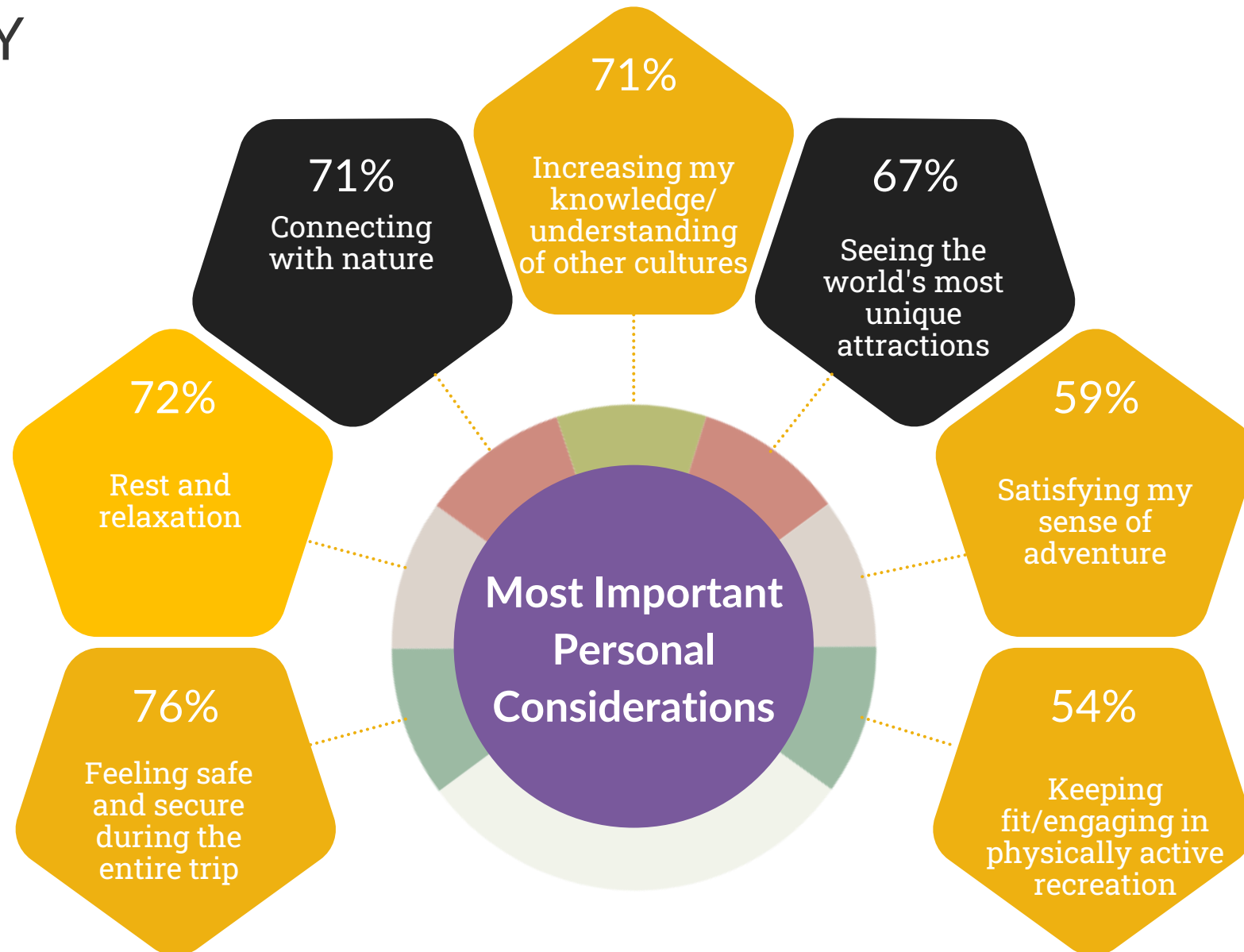
---

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

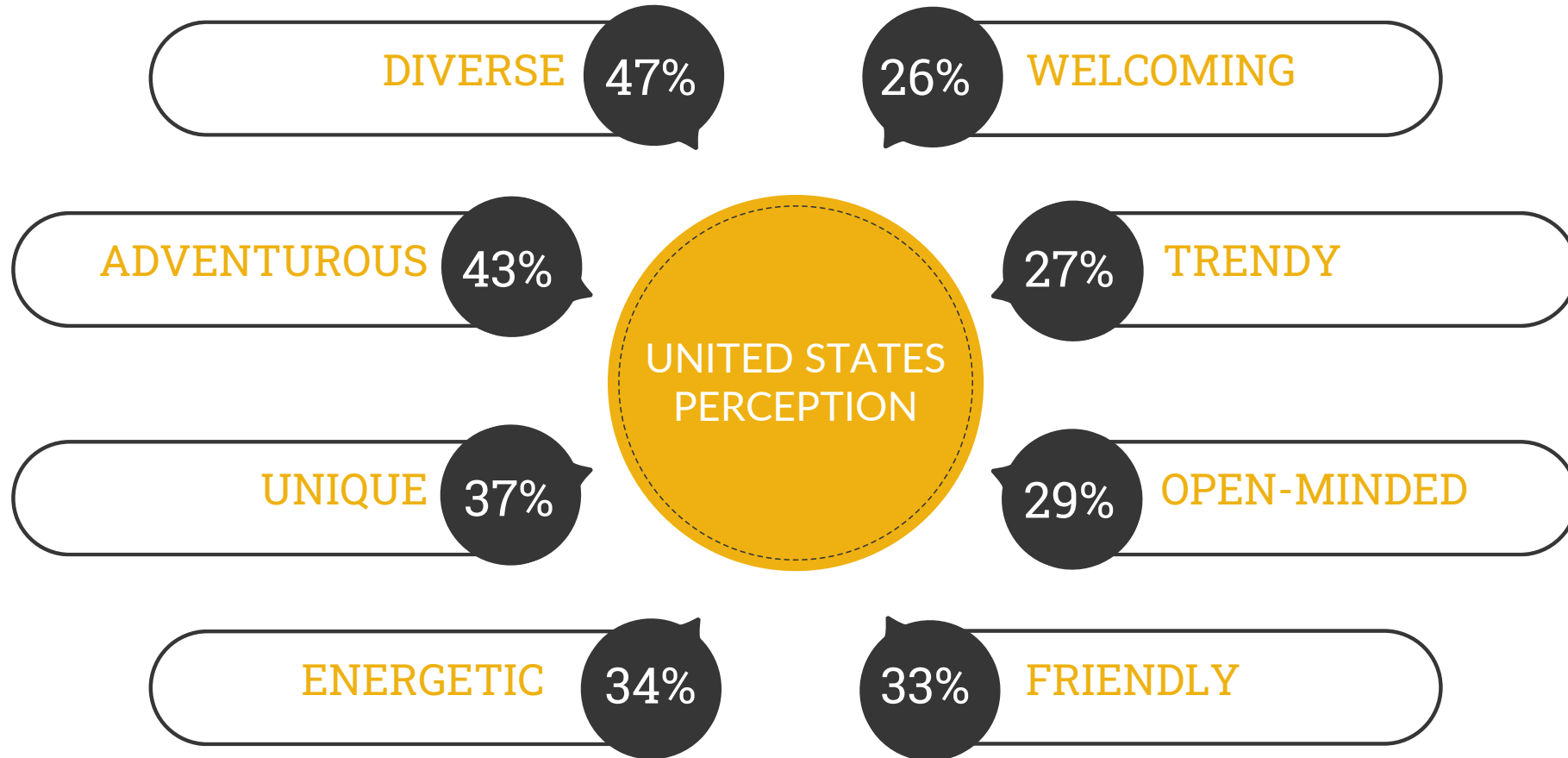
- 48%** Personal safety concerns
- 46%** Uncleanliness in the destination
- 42%** Crowdedness
- 38%** High prices
- 38%** Political climate not aligning with personal views
- 31%** Lack of environmental responsibilities
- 30%** Lack of information for planning trip & at destination
- 25%** Inconvenience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

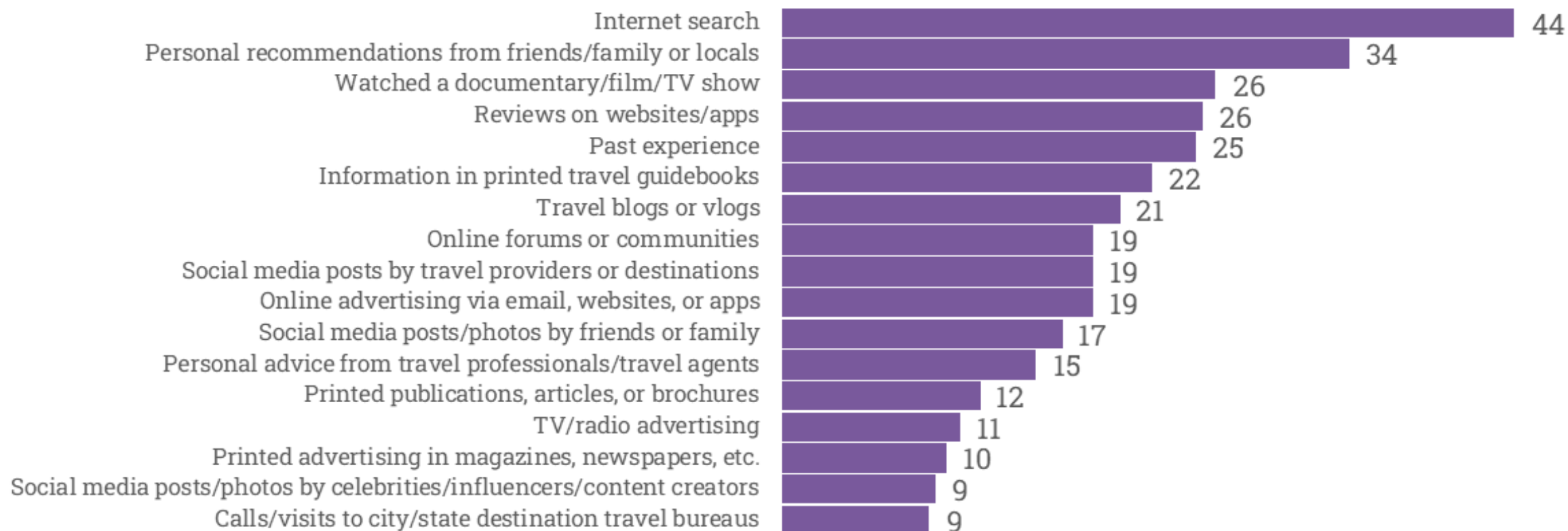
---



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)

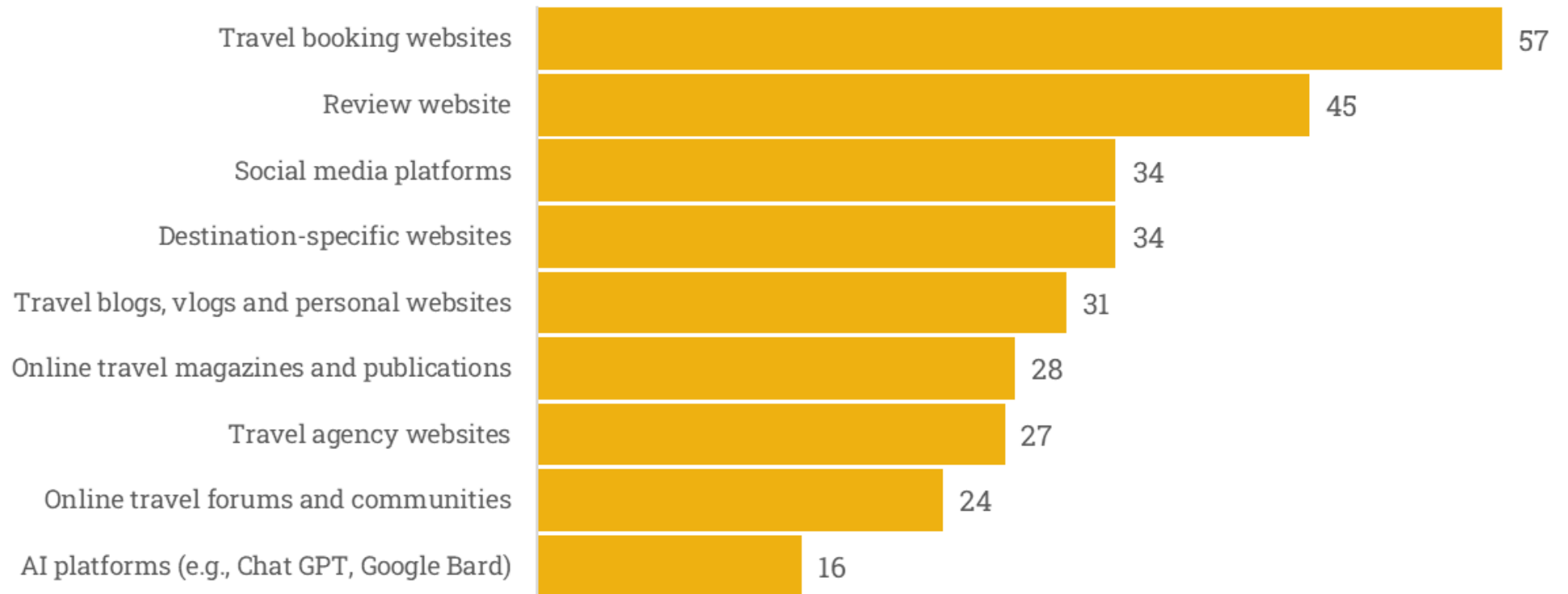
## Sources of Information for Destination Selection (%)



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

# 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.

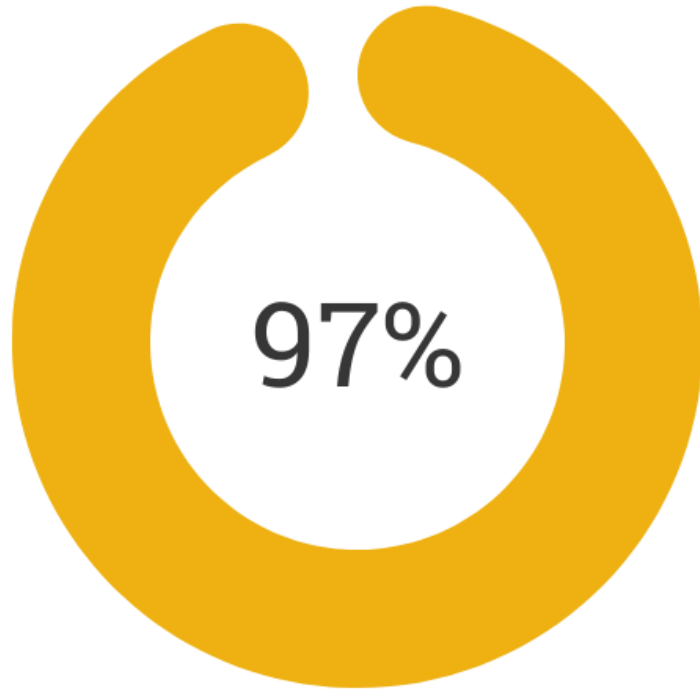


Note: Indian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

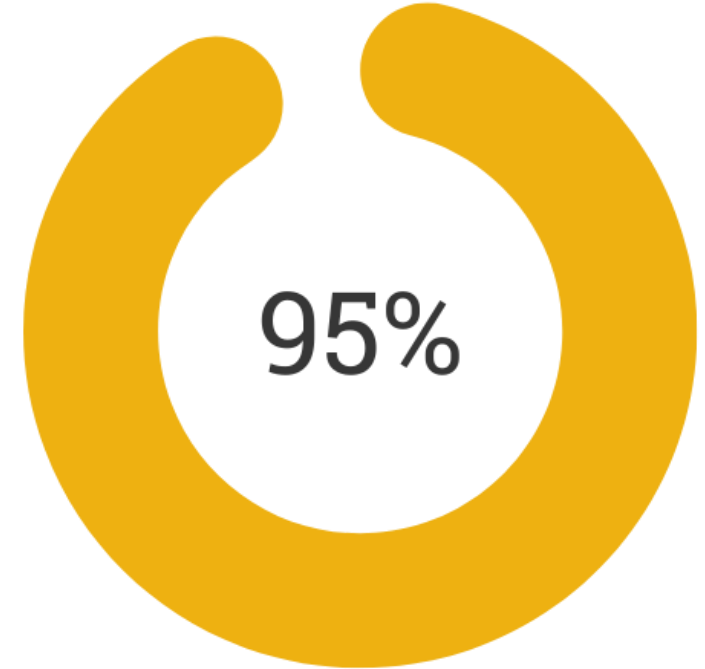
# INDIA

---



## 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%

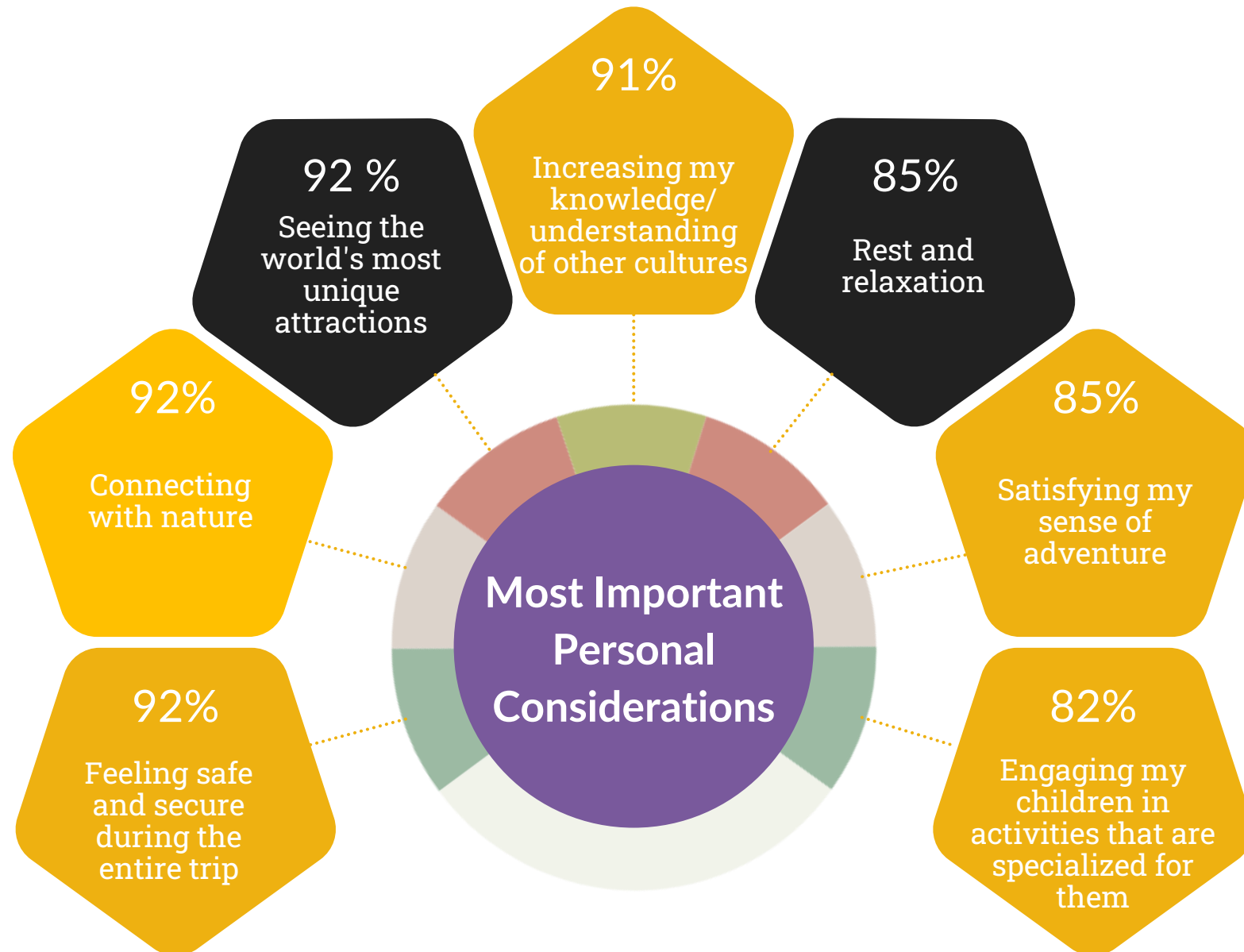
# 2.5

**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

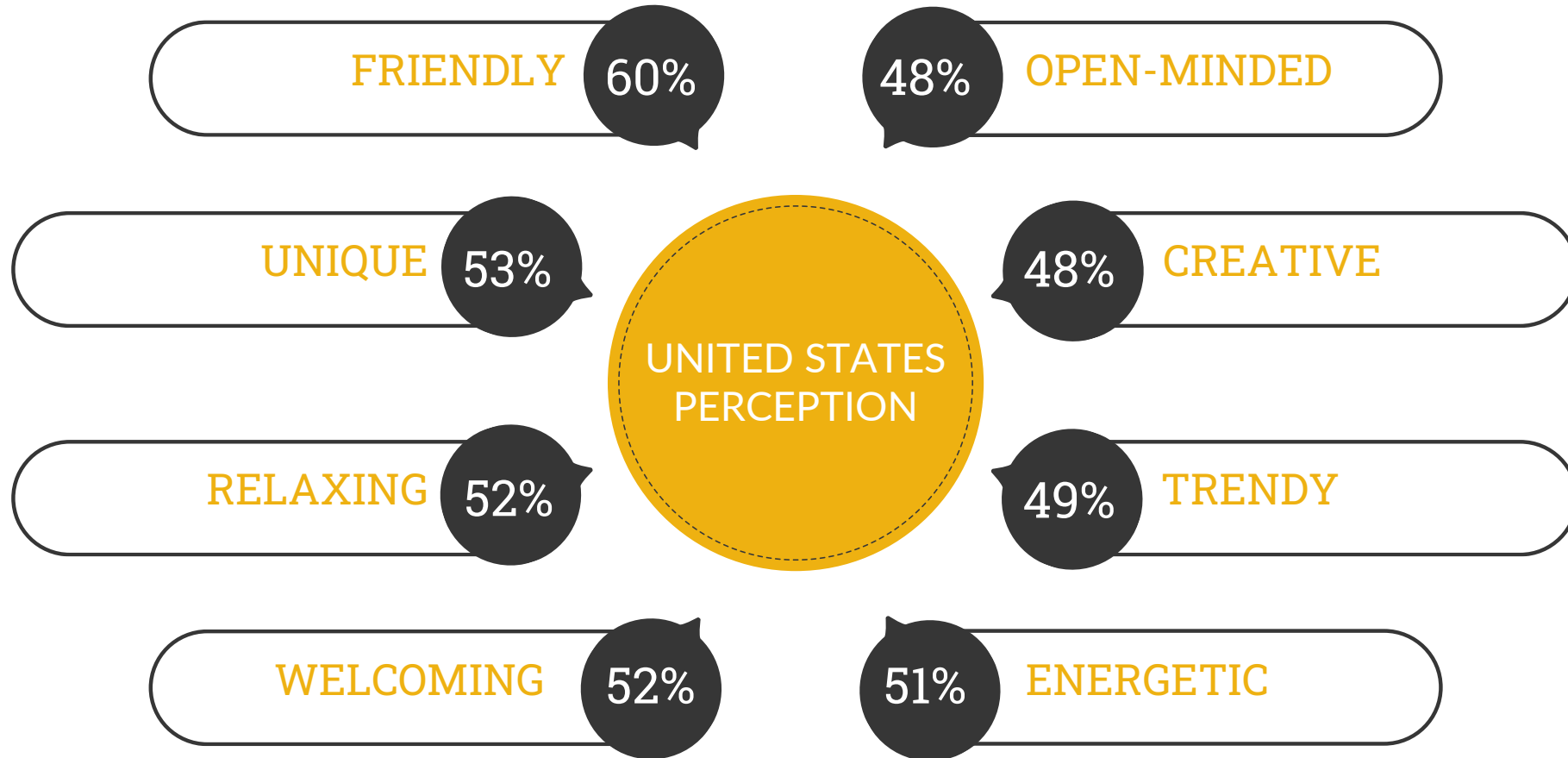
- 63%** Uncleanliness in the destination
- 55%** Personal safety concerns
- 52%** Inconvenience of travel to the destination
- 51 %** Lack of environmental responsibilities
- 48%** Lack of information for planning trip & at destination
- 46%** High prices
- 44%** Visa requirements/entry procedures
-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

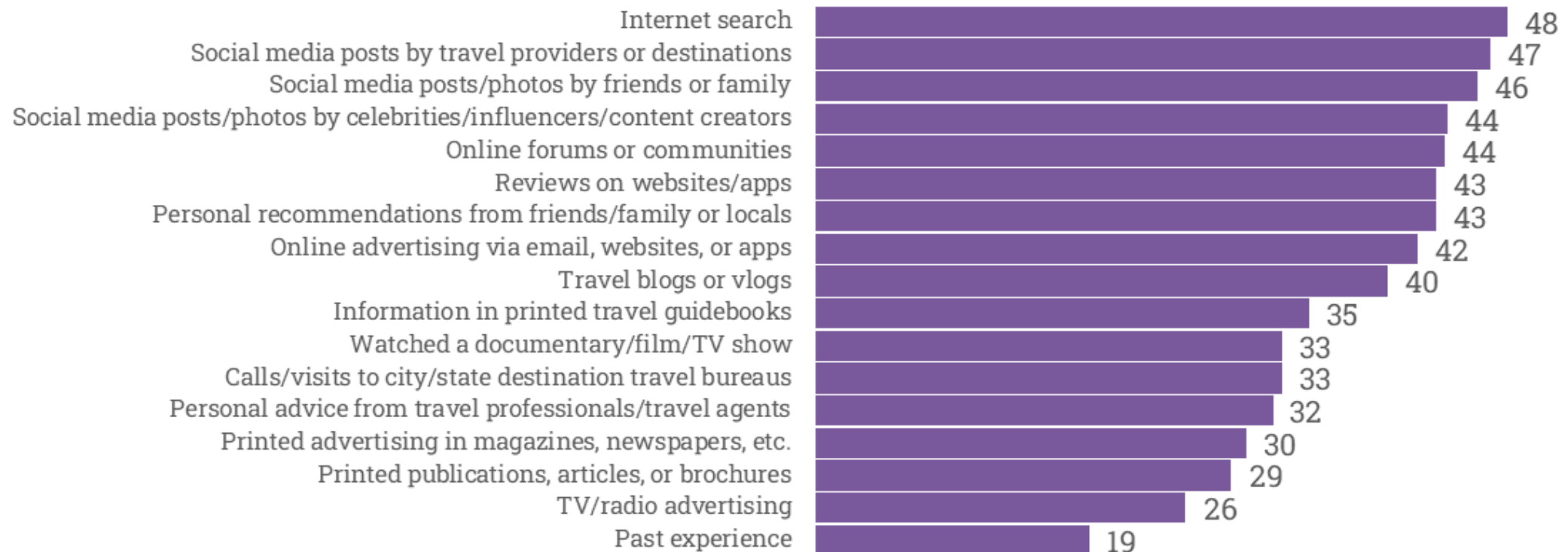
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Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

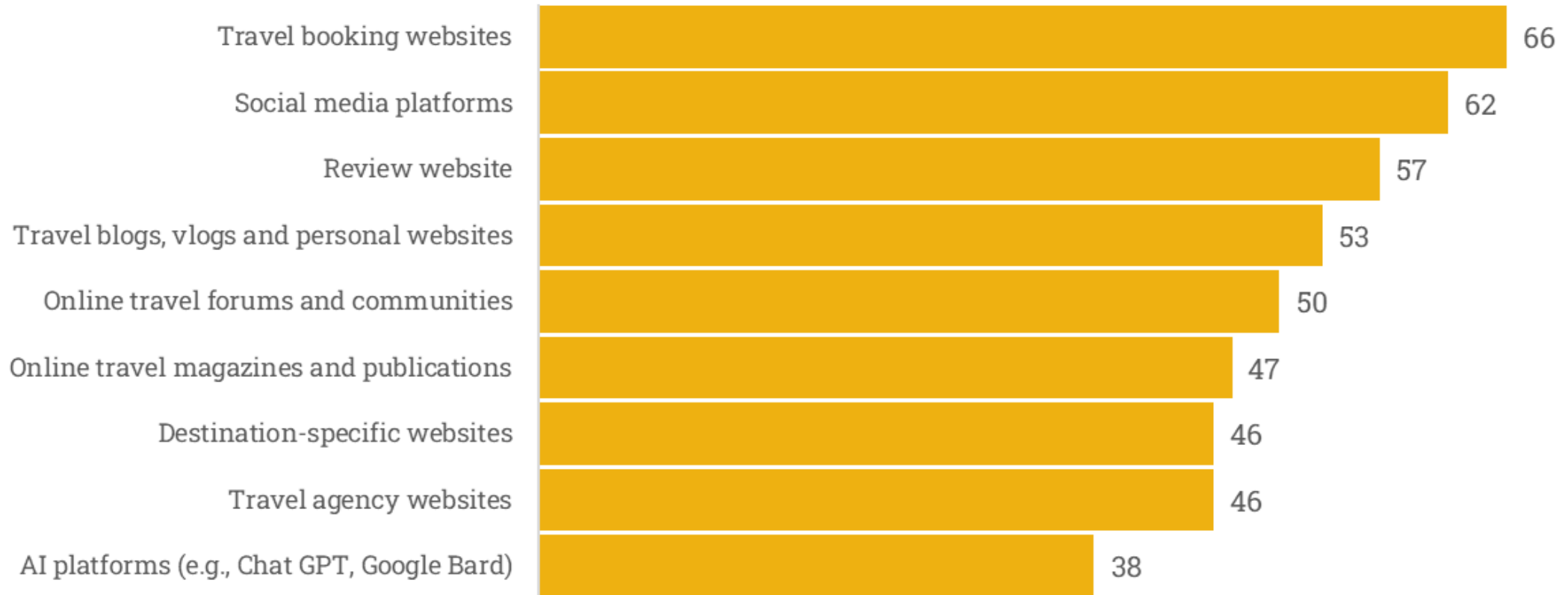
## Sources of Information for Destination Selection (%)



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

---

## 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

# SOUTH KOREA



POPULATION  
*2024*

52M

REAL GDP  
GROWTH  
*2025 PROJECTION*

2.2%

CURRENCY  
RATE  
SOUTH KOREAN  
WON  
2024

1364.15

INFLATION  
RATE  
*2025 PROJECTION*

2.0%

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

9.1%

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

33.5%

# SOUTH KOREA

---

37%

Likelihood to Visit Travel South  
in the next Five Years

Note: South Korean visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:



- 40% Hotels and lodging
- 34% Safety
- 31% Opportunities for relaxation
- 30% Restaurants and food
- 28% Family fun
- 28% Sightseeing tours
- 27% Important or iconic attractions
- 24% Historical attractions
- 23% Shopping
- 23% Transportation and how to get around
- 22% Ways to experience nature
- 18% Ways to experience the American lifestyle
- 18% Theme parks
- 18% National Parks
- 18% Availability of direct flight service
- 16% Museums and culture
- 16% Things to do outside the large cities
- 13% Beaches
- 12% Sample trip itineraries
- 9% Entertainment, events, shows
- 9% Commitment to being an eco-friendly/sustainable place
- 7% Ideas for adventurous travel
- 7% Touristy attractions to avoid
- 6% Level of crowds
- 6% Recommendations from residents
- 6% Off-the-beaten path attractions
- 5% Professional sporting events
- 4% Outdoor activities (biking, boating, hiking, etc.)
- 4% Snow/winter activities (skiing, sledding, etc.)

Source: Future Partners (2025)

# SOUTH KOREA

---

Recall of “Buzz”: Travel South Destinations

33%

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



Note: South Korean visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

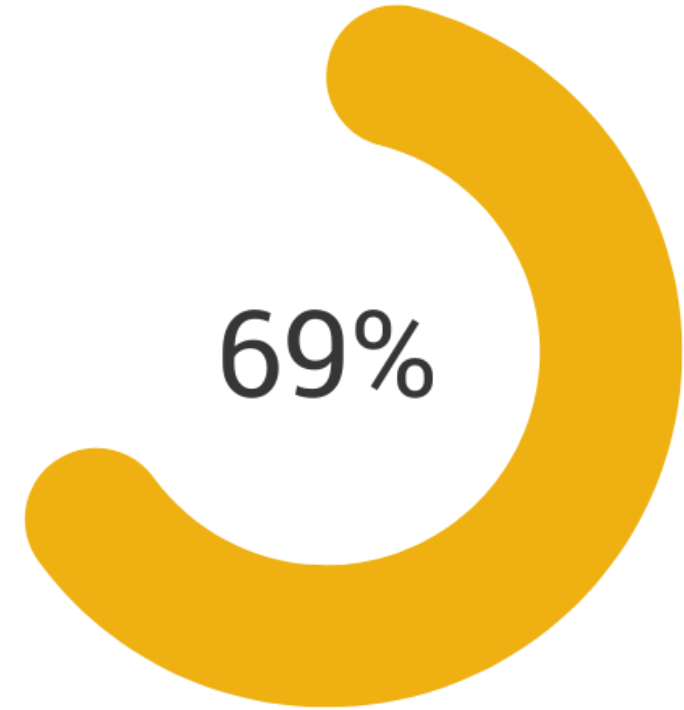
# SOUTH KOREA

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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

# SOUTH KOREA

---



1 Trip

---

27%

2 Trips

---

24%

3-4 Trips

---

28%

5+ Trips

---

21%

3.1

Average Number of Leisure  
International Trips

Note: South Korean 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)

# SOUTH KOREA

---



# 1.5

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

**1+ Trips**

---

50%

**1 Trip**

---

21%

**2 Trips**

---

7%

**3+ Trips**

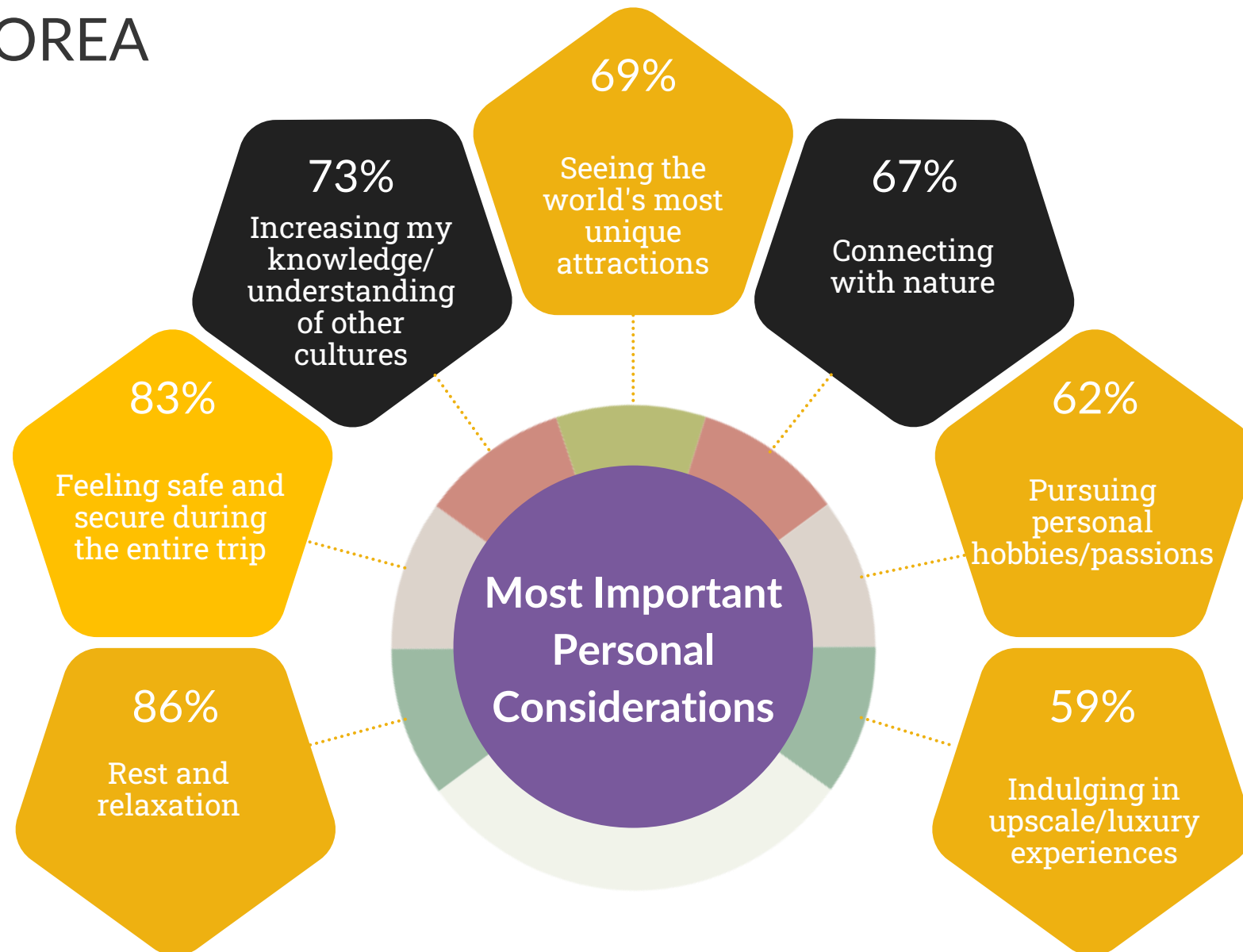
---

23%

Note: South Korean 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)

# SOUTH KOREA



Note: South Korean 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)

# SOUTH KOREA

## Most Important When Choosing a Destination

- 83%** Climate or weather at the destination
- 82%** Leisure attractions
- 81 %** Appeal of local culture
- 79%** Natural features/landscapes
- 79%** Ease of travel to the destination
- 78%** Landmarks and sightseeing options
- 75%** Accommodation options
- 72%** Reputation/popularity as a travel destination

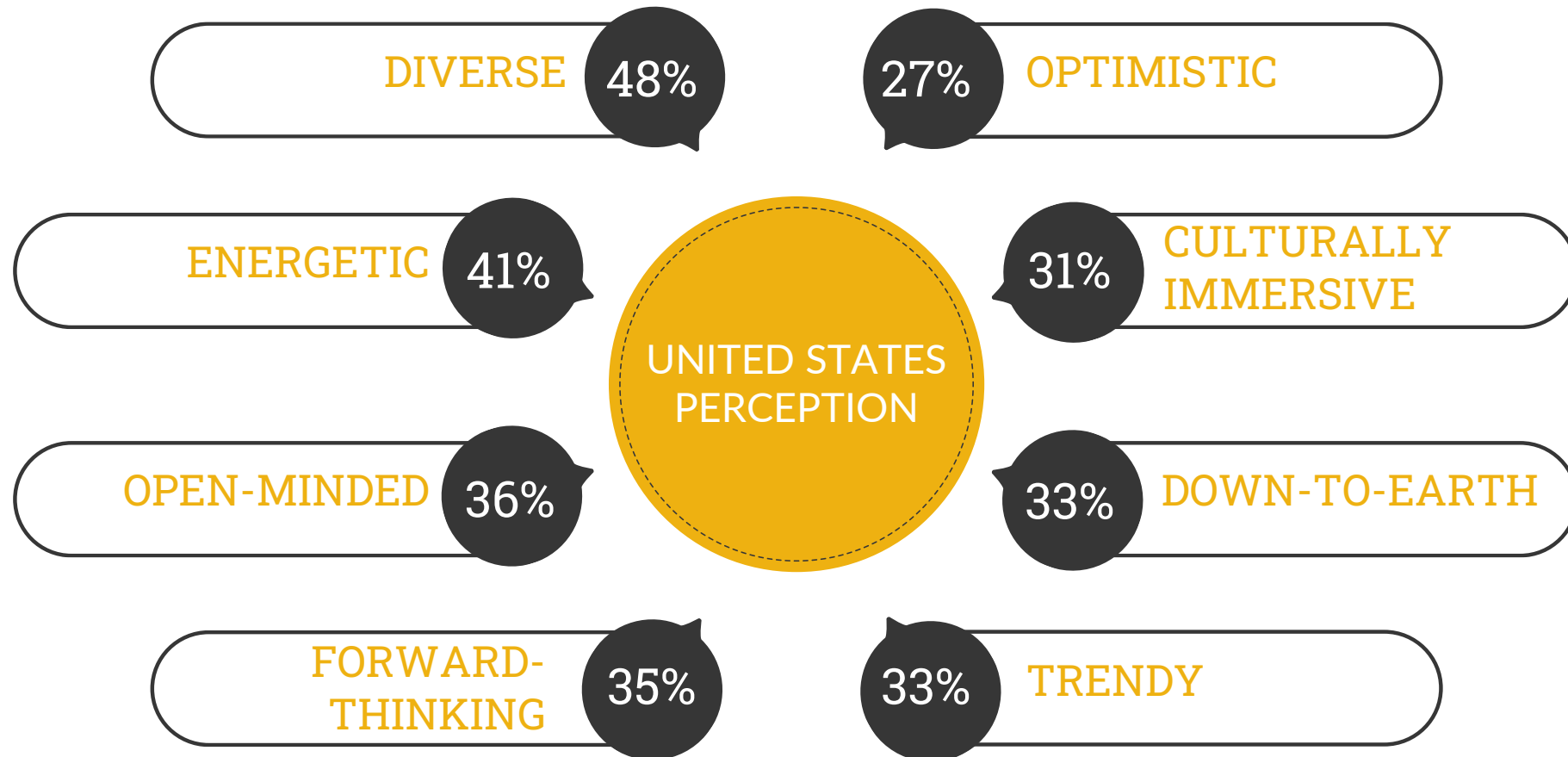
## Most Discouraging From Visiting a Destination

- 50%** Personal safety concerns
- 48%** Uncleanliness in the destination
- 40%** High prices
- 33%** Political climate not aligning with personal views
- 31 %** Crowdedness
- 30%** Lack of information for planning trip & at destination
- 30%** Inconvenience of travel to the destination
- 28%** Lack of environmental responsibilities

Note: South Korean 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)

# SOUTH KOREA



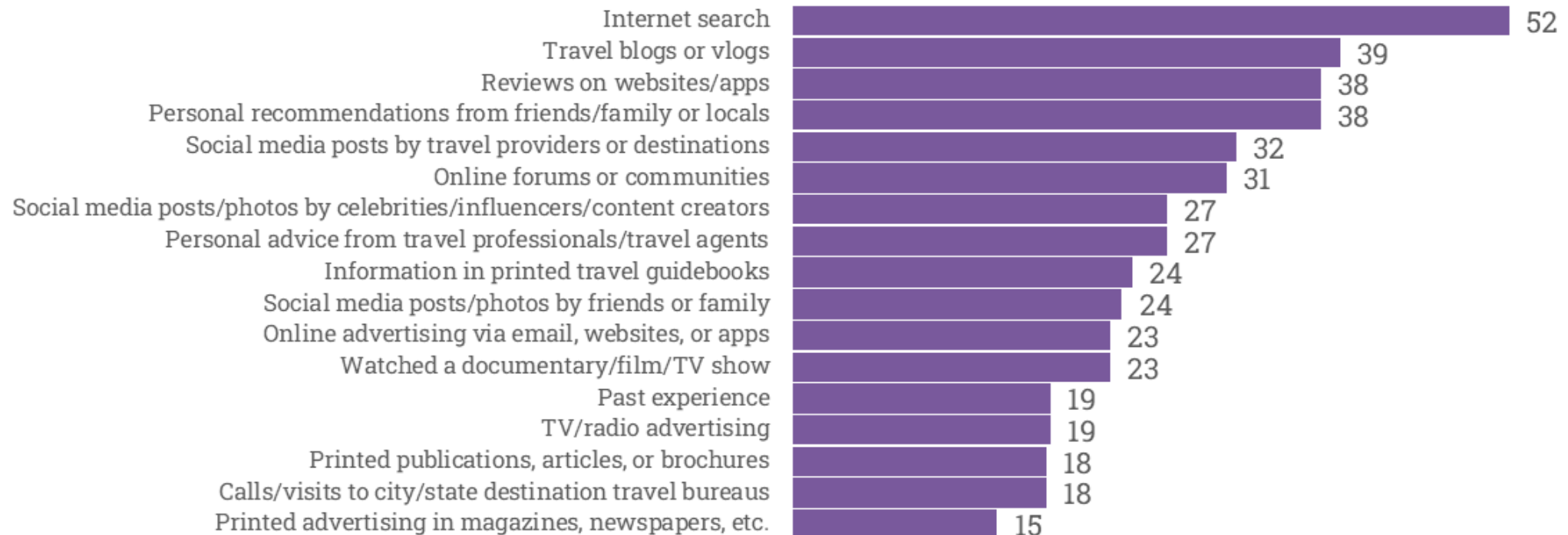
Note: South Korean visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

# SOUTH KOREA



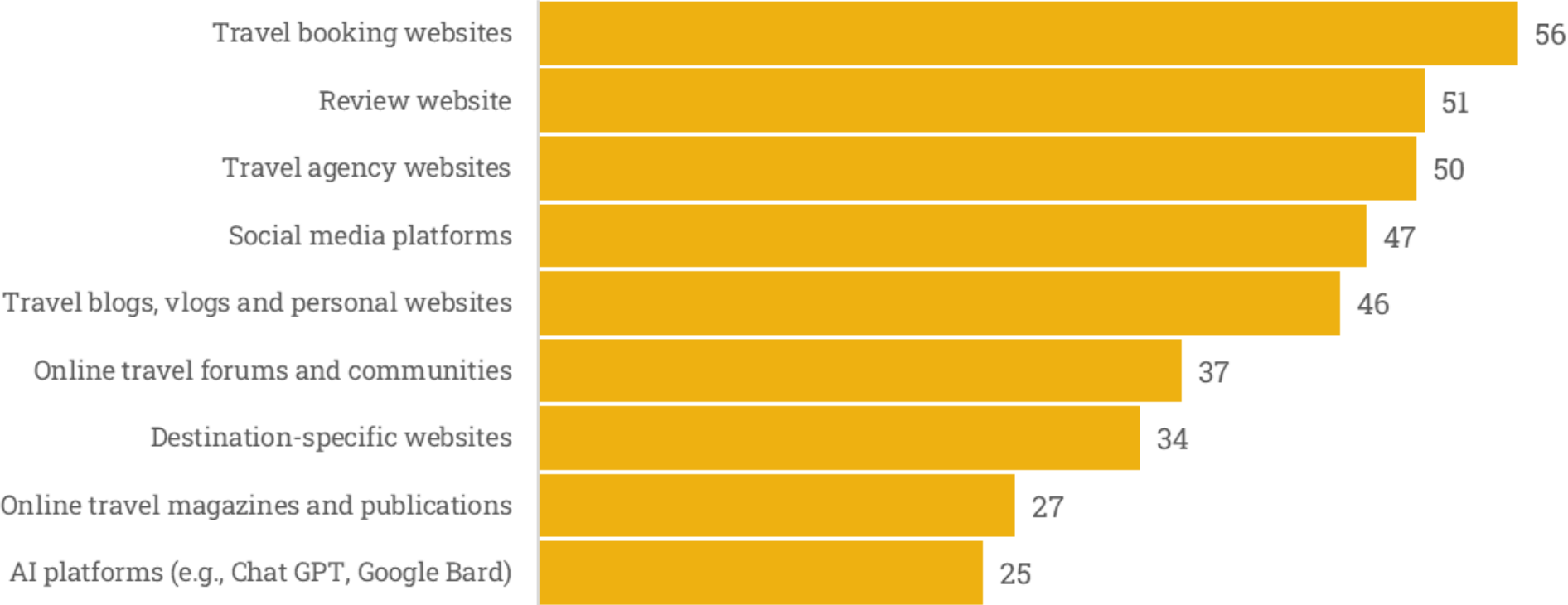
## Sources of Information for Destination Selection (%)



Note: South Korean 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: South Korean 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	82%
Instagram	77%
Facebook/META	56%
Tik Tok	46%
Twitter/X	43%
Pinterest	21 %
Snapchat	19 %
Tumblr	13 %
LinkedIn	12 %
Reddit	11 %

Note: South Korean 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)

# SOUTH KOREA

---

## Likelihood of how 2025 will evolve:

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

52%

Global wars/strife will impact the destinations visited in 2025

51%

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

50%

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

49%

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

48%

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

# Resources



## Market Profiles

## Global Partner Program

