

TRAVEL SOUTH  USA

KENTUCKY

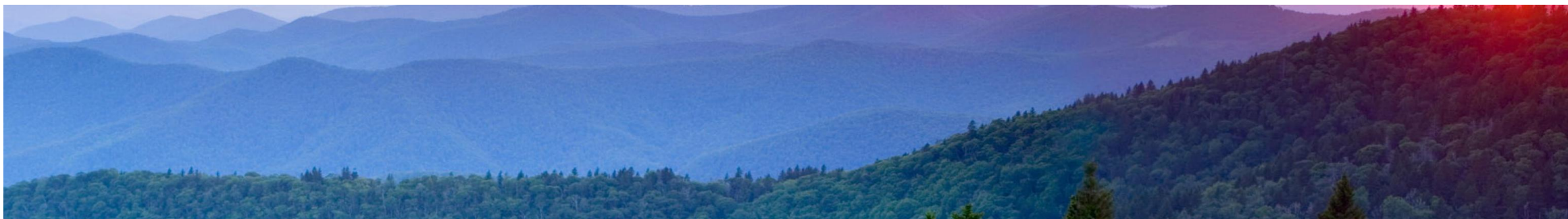


**INTERNATIONAL MARKETS**

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

# Kentucky's International Visitor Economy



## *Highlighting the State's Global Interconnectivity*



### Outlook

- By 2025, forecasted to reach **\$244 million** and **285,000 visitors**

### US Inbound Travel Rebound – Key Markets

- International inbound spending is expected to decline by 5% from 2024, a 12% decrease compared to 2019.
- **India, Japan and Brazil are projected to grow in 2025.**
- Fueled by visitors from **Canada, United Kingdom/Ireland, DACH Region, Japan, India, Brazil, Spain, Australia, South Korea and Italy**, accounting for **63%** of the state's international tourism expenditures

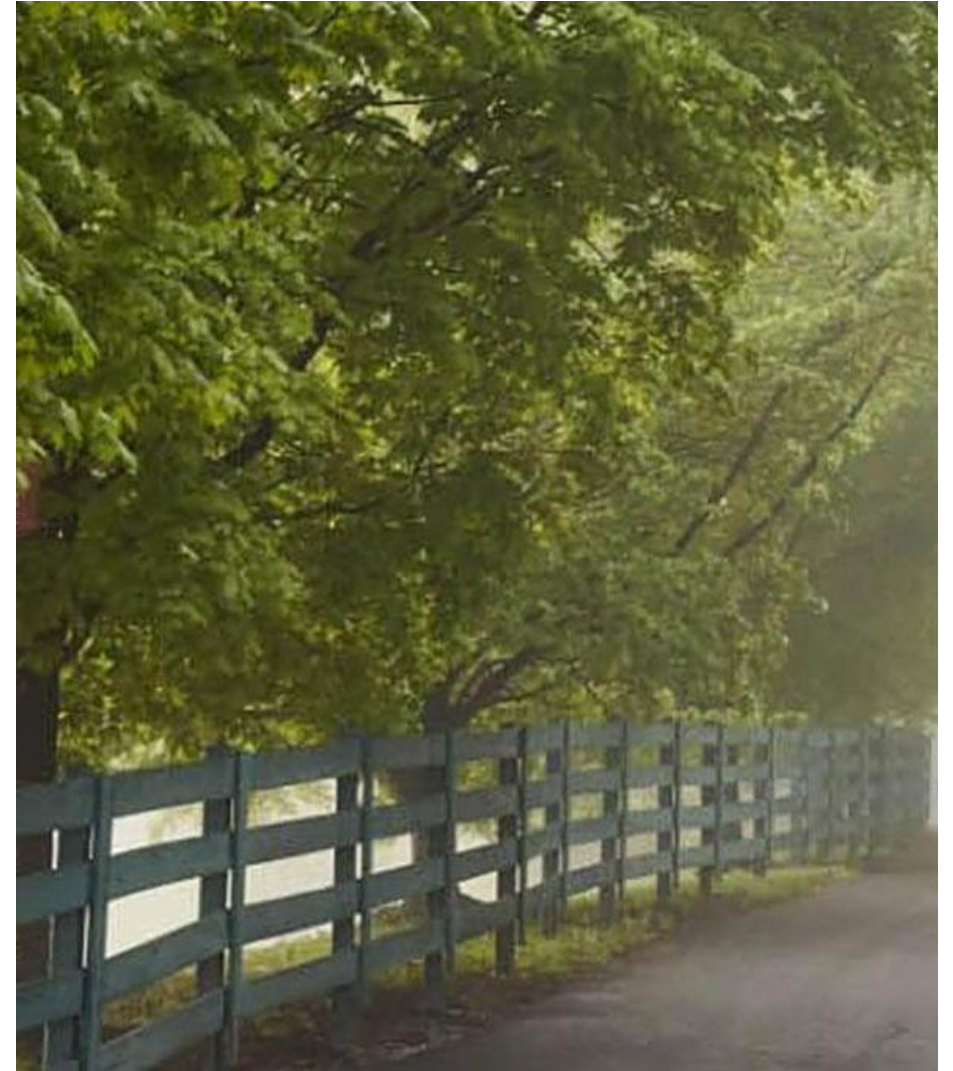
### Exports by Market

- **4,000** companies exported **\$48 billion** worth of goods
- Exports to **Canada, the UK, France, Mexico and Brazil** are among the top origin markets of visitation
- **India and China** account for one out of four international student population
- **68%** of visits are non-business related

# Kentucky's International Visitor Economy

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

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

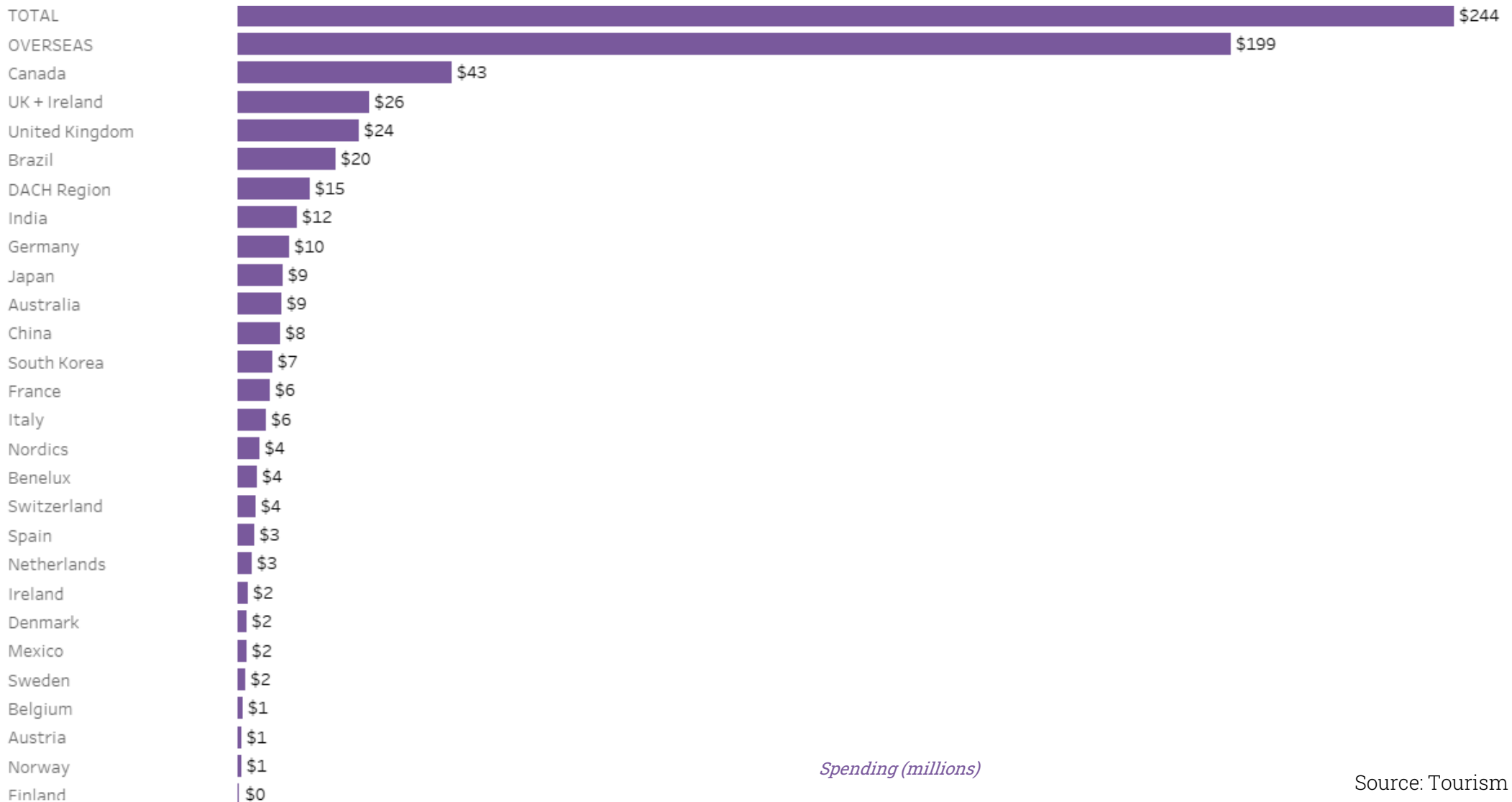




# Visitor Economy

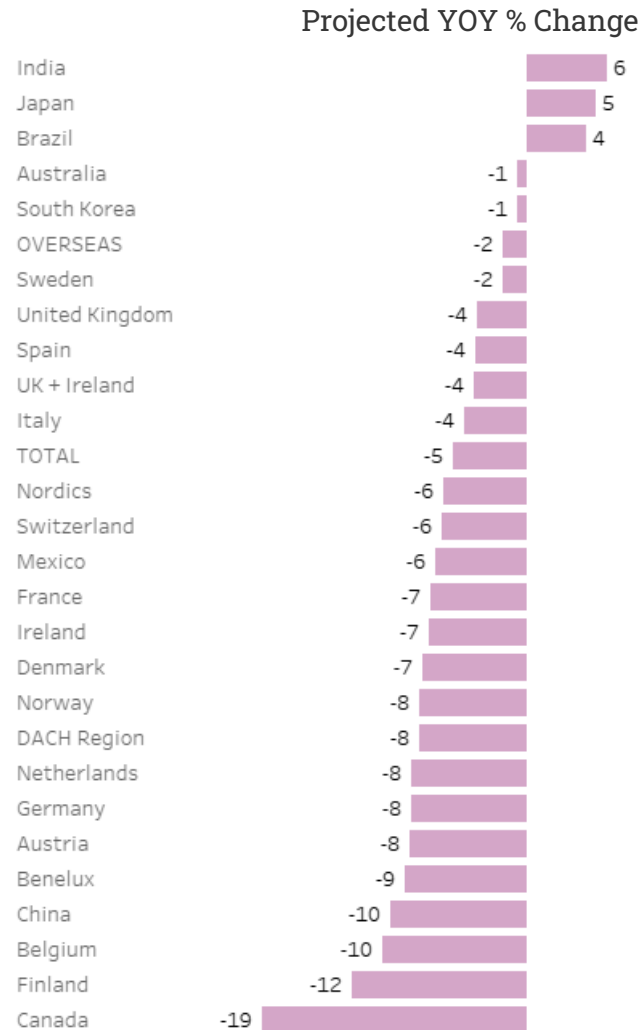
*April 15, 2025*

# 2025 Outlook: Visitor Spending by Key Markets

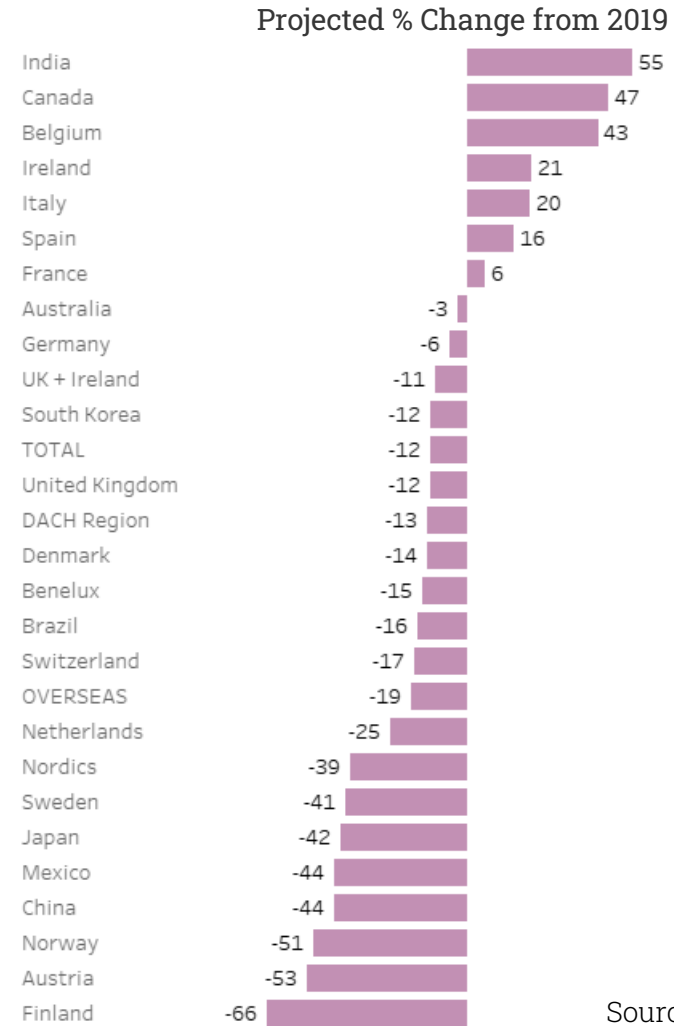


Spending (millions)

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



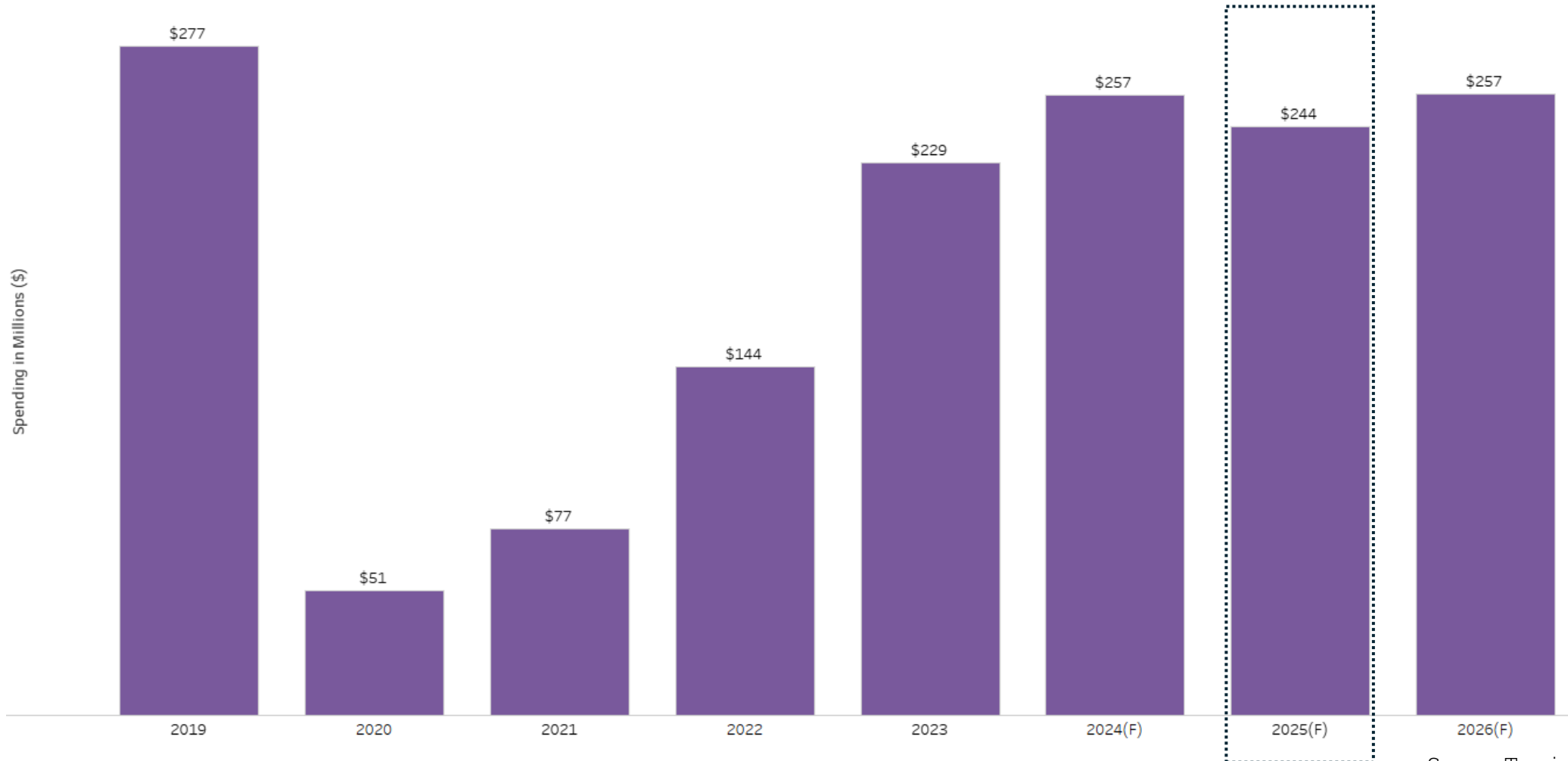
# 2019 Baseline Comparison





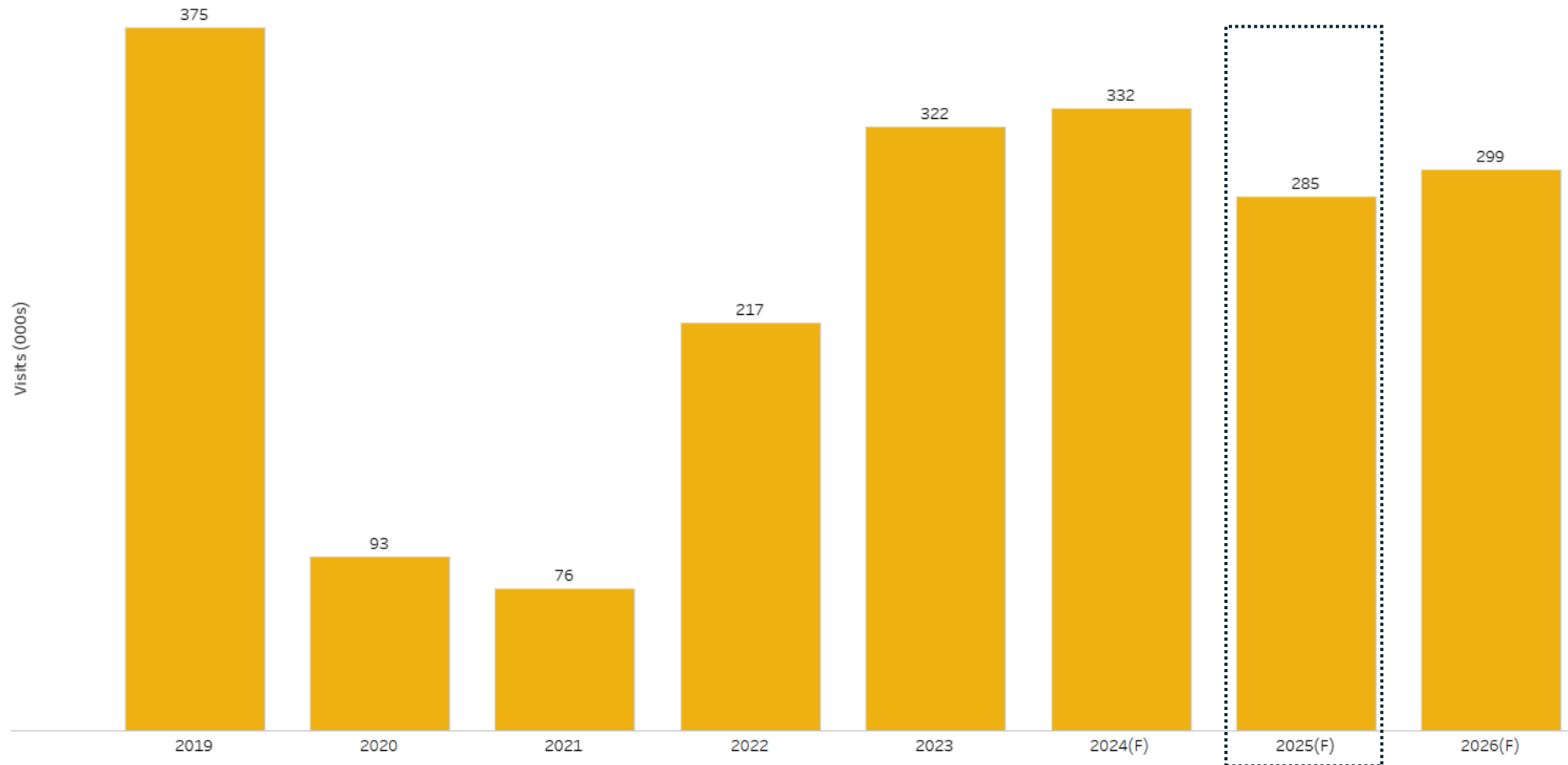
# KENTUCKY

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



# KENTUCKY

2025 Visitor Volume Outlook: Down 14% from 2024, still below 2019



# KENTUCKY

## \$244M Projected Spend and 285,000 Visits in 2025, down 5% and 14% from 2024

- Tourism Economics estimates **Overseas spending** to decline by **2%** year-over-year (yoy) in **2025** – **Canada, a 19% decline**
- **India, Japan and Brazil** are projected to grow in 2025
- **Canada, U.K./Ireland, Brazil, DACH Region and India** 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	244		-5	285	-14	-12	-24
OVERSEAS	199		-2	116	-3	-19	-27
Canada	43		-19	163	-21	47	-22
UK + Ireland	26		-4	14	-5	-11	-30
United Kingdom	24		-4	13	-5	-12	-30
Brazil	20		4	7	-1	-16	-31
DACH Region	15		-8	9	-9	-13	-20
India	12		6	8	2	55	87
Germany	10		-8	7	-10	-6	-13
Japan	9		5	7	4	-42	-43
Australia	9		-1	4	-2	-3	-34
China	8		-10	4	-9	-44	-63
South Korea	7		-1	4	-1	-12	-22
France	6		-7	5	-8	6	-26
Italy	6		-4	4	-6	20	0
Nordics	4		-6	3	-7	-39	-47
Turkiye	4		5	2	2	78	-30
Benelux	4		-9	3	-9	-15	-24
Israel	4		12	3	7	-36	-21
Switzerland	4		-6	2	-6	-17	-36

# KENTUCKY



## \$244M Projected Spend and 285,000 Visits in 2025 (cont.)

Market	Spending (\$M)	🏠	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
Spain	3		-4	3	-7	16	-21
Argentina	3		8	2	4	-7	-26
Netherlands	3		-8	2	-9	-25	-29
Taiwan	2		18	2	10	-38	-1
South Africa	2		3	1	0	-30	-38
Ireland	2		-7	1	-6	21	-27
Denmark	2		-7	1	-10	-14	-30
Mexico	2		-6	6	-8	-44	-13
Philippines	2		0	1	1	3	15
Sweden	2		-2	1	-5	-41	-46
Poland	2		2	1	-5	26	21
United Arab Emirates	2		2	1	4	-60	-49
Egypt	1		-4	1	-4	-65	-45
Ukraine	1		6	0	4	48	-60
Saudi Arabia	1		1	1	1	-55	-61
Belgium	1		-10	1	-9	43	-2
Portugal	1		-5	1	-6	-7	-2
Austria	1		-8	1	-9	-53	-33
Singapore	1		1	0	1	-24	-33
Morocco	1		-4	0	-3	-18	-24
Hong Kong	1		0	0	2	-49	-38
Norway	1		-8	0	-6	-51	-51
Czech Republic	1		-9	0	-10	-13	-32

# KENTUCKY



## Visitor Spending 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending (\$M)	TOTAL	\$277	\$51	\$77	\$144	\$229	\$257	\$244
	OVERSEAS	\$245	\$44	\$73	\$122	\$178	\$202	\$199
	Canada	\$29	\$6	\$3	\$20	\$50	\$53	\$43
	UK + Ireland	\$29	\$4	\$4	\$23	\$27	\$27	\$26
	Brazil	\$24	\$4	\$5	\$13	\$17	\$19	\$20
	DACH Region	\$17	\$2	\$3	\$11	\$14	\$16	\$15
	India	\$8	\$2	\$3	\$7	\$8	\$11	\$12
	Japan	\$16	\$3	\$2	\$3	\$8	\$9	\$9
	Australia	\$9	\$1	\$0	\$4	\$7	\$9	\$9
	China	\$15	\$4	\$3	\$1	\$4	\$9	\$8
	South Korea	\$8	\$2	\$3	\$4	\$6	\$7	\$7
	France	\$6	\$1	\$1	\$5	\$7	\$7	\$6
	Italy	\$5	\$1	\$1	\$3	\$5	\$6	\$6
	Nordics	\$7	\$1	\$1	\$4	\$5	\$5	\$4
	Benelux	\$5	\$1	\$1	\$2	\$4	\$4	\$4
	Spain	\$3	\$0	\$1	\$3	\$3	\$3	\$3
	Mexico	\$3	\$1	\$1	\$2	\$2	\$2	\$2

# KENTUCKY



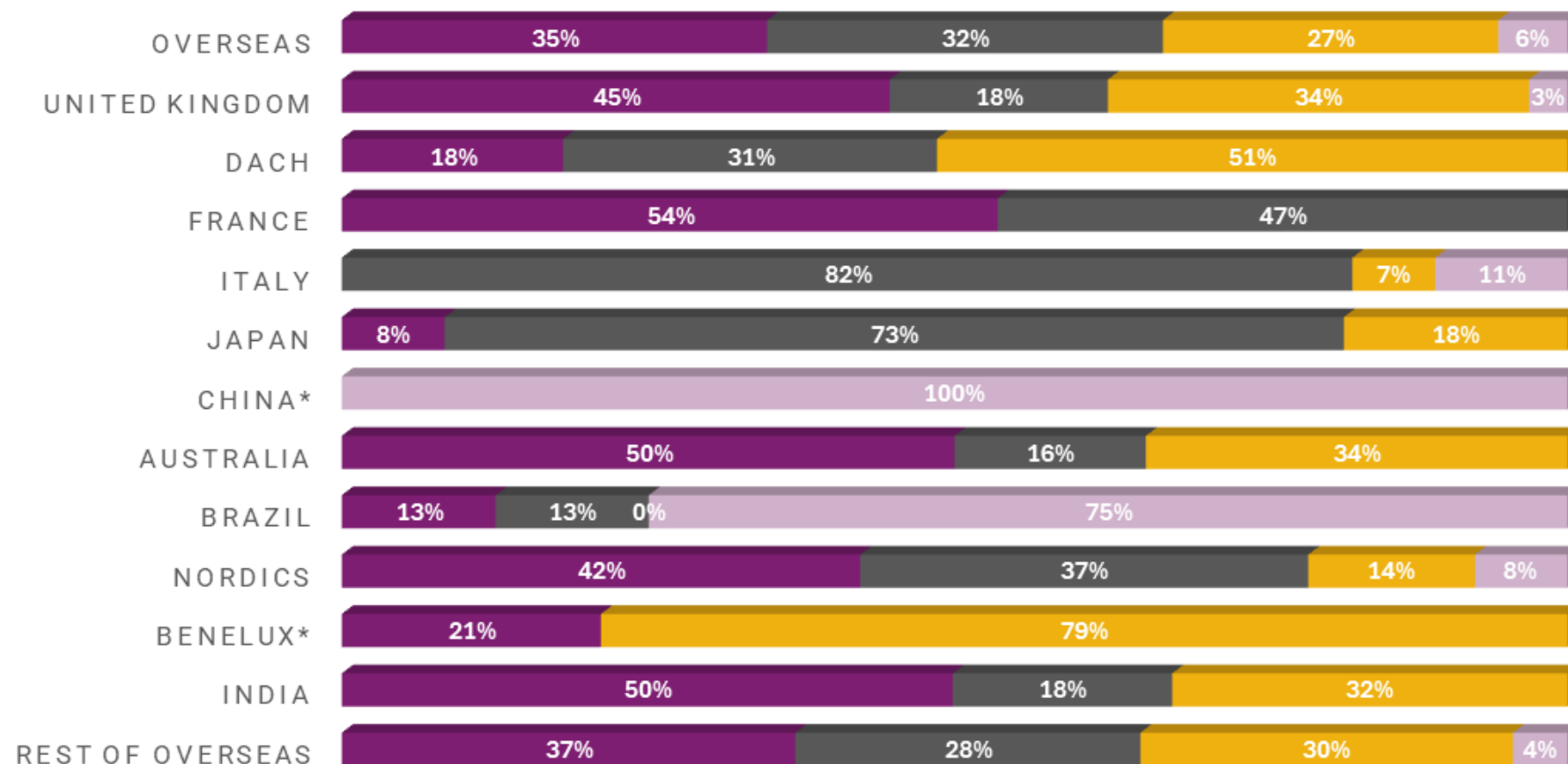
## Visits 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Visits (000s)	TOTAL	375	93	76	217	322	332	285
	Canada	210	52	25	134	208	205	163
	OVERSEAS	158	38	47	78	108	120	116
	UK + Ireland	20	4	4	14	15	15	14
	DACH Region	11	2	3	7	9	10	9
	India	4	1	2	5	6	8	8
	Japan	13	3	1	2	6	7	7
	Brazil	10	2	2	5	6	7	7
	Mexico	7	3	3	5	6	6	6
	France	6	1	1	4	5	5	5
	Italy	4	1	1	3	4	5	4
	South Korea	6	2	1	2	4	4	4
	China	10	2	1	1	3	4	4
	Australia	5	1	0	2	3	4	4
	Benelux	4	1	1	2	3	4	3
	Nordics	5	1	1	2	3	3	3
	Spain	3	1	1	2	2	3	3

# KENTUCKY

## KENTUCKY: Purpose of Trip

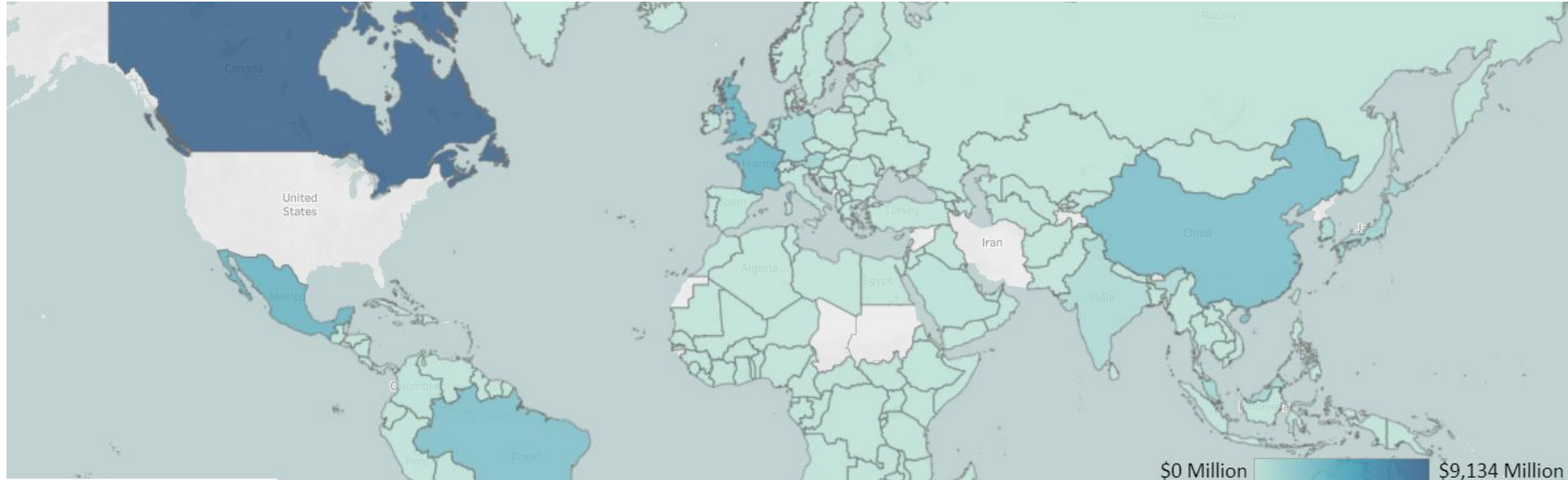
Leisure Business VFR Other



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



# Exports (Goods)



## EXPORTS IN GOODS *2024*

**\$48 Billion**

## TOP COUNTRIES

CANADA  
UK  
FRANCE  
CHINA  
MEXICO  
BRAZIL



Goods Exports by Country

(in millions)

Partner	2024
World	\$47,774
Canada	\$9,319
United Kingdom	\$4,929
France	\$4,751
China	\$4,317
Mexico	\$4,153
Brazil	\$3,716
Netherlands	\$1,725
Malaysia	\$1,706
Germany	\$1,521
Singapore	\$1,410
Austria	\$1,237
Japan	\$1,153
United Arab Emirates	\$865
South Korea	\$812
Hong Kong	\$645

EXPORTERS

3,845

Kentucky companies exported goods in  
2021

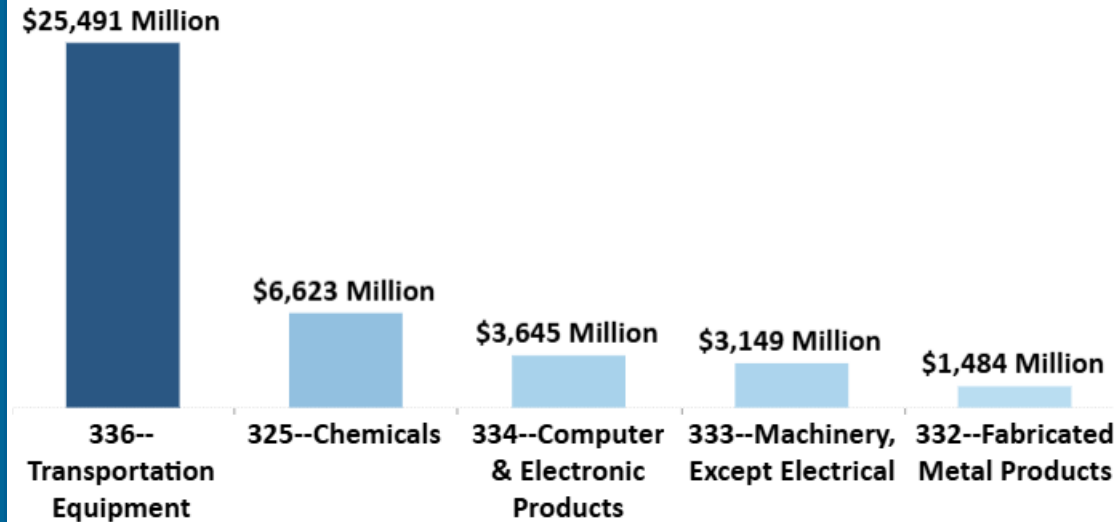
80%

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

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

TOP TRADE SECTORS

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



# International Students

# KENTUCKY

INTERNATIONAL  
STUDENTS  
*2022/23*

10,050

STUDENT-VISIT  
RATIO

2.8%

INDEXED  
STUDENT-VISIT  
RATIO  
U.S. = 100

266

# KENTUCKY

## INTERNATIONAL STUDENTS, 2023/24



**10,050**

International Students



**25**

Rank in the United States\*



**2.9**

% Change from  
Previous Year



**\$310,527,560**

Estimated International  
Student Expenditure\*\*

## LEADING PLACES OF ORIGIN

Place of Origin	% Total
India	<b>18.1</b>
China	<b>9.1</b>
Nepal	<b>7.8</b>
Nigeria	<b>6.0</b>
South Korea	<b>3.5</b>

## LEADING INSTITUTIONS

Institution	Total
University of Kentucky	<b>1,690</b>
University of Louisville	<b>877</b>
Northern Kentucky University	<b>482</b>
Murray State University	<b>455</b>
Western Kentucky University	<b>167</b>

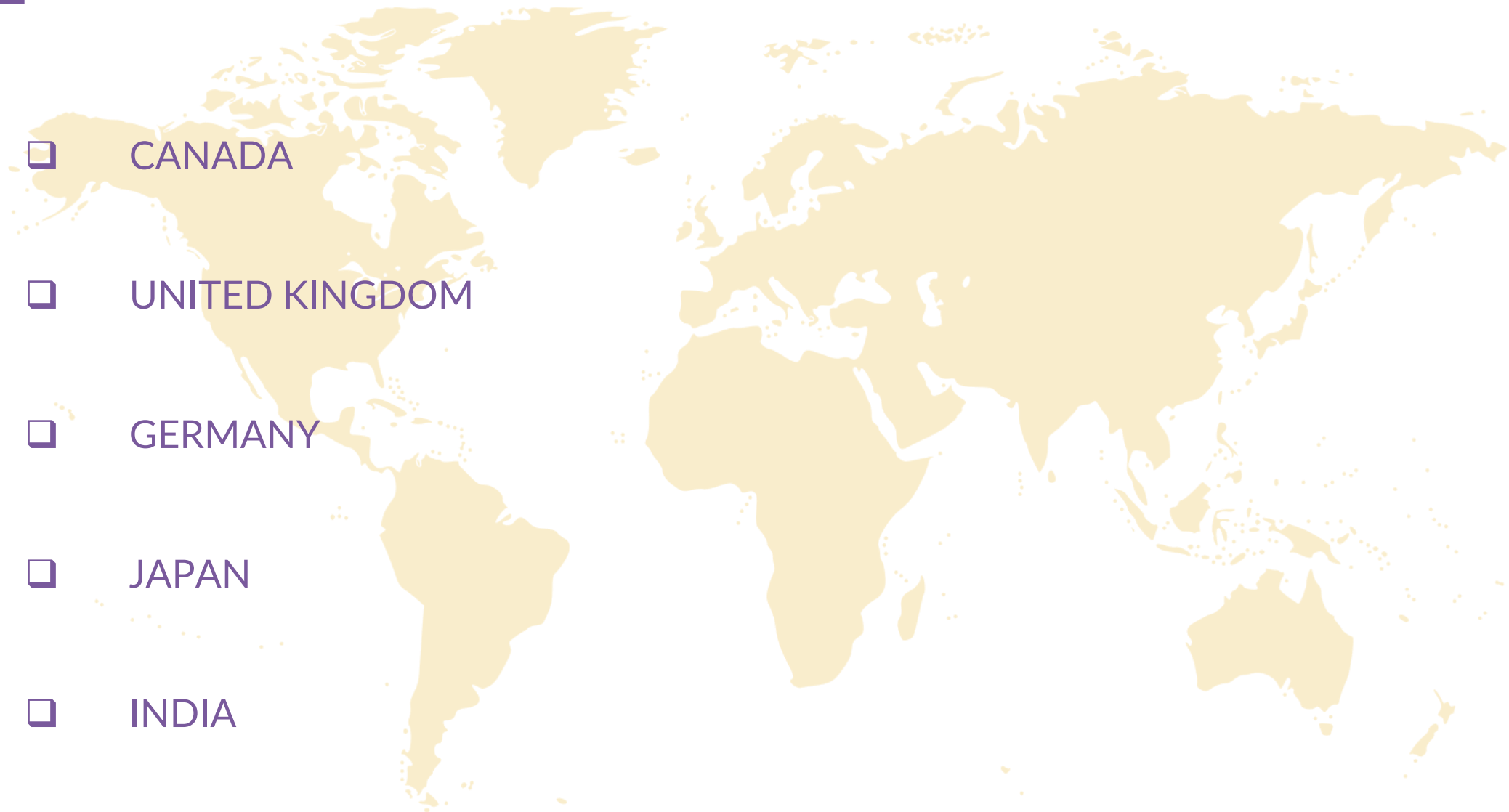


# Visitor Perception

# 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)

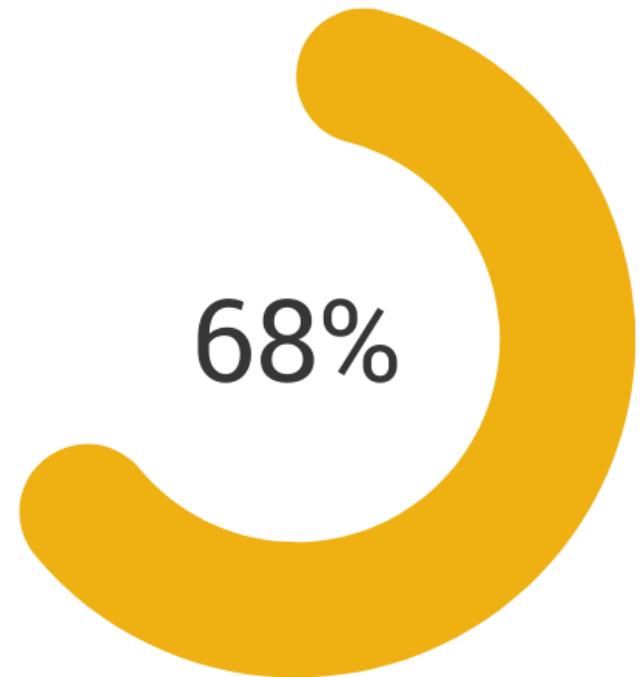
# CANADA

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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

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## 1+ Trips

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26%

## 1 Trip

---

17%

## 2 Trips

---

5%

## 3+ Trips

---

5%

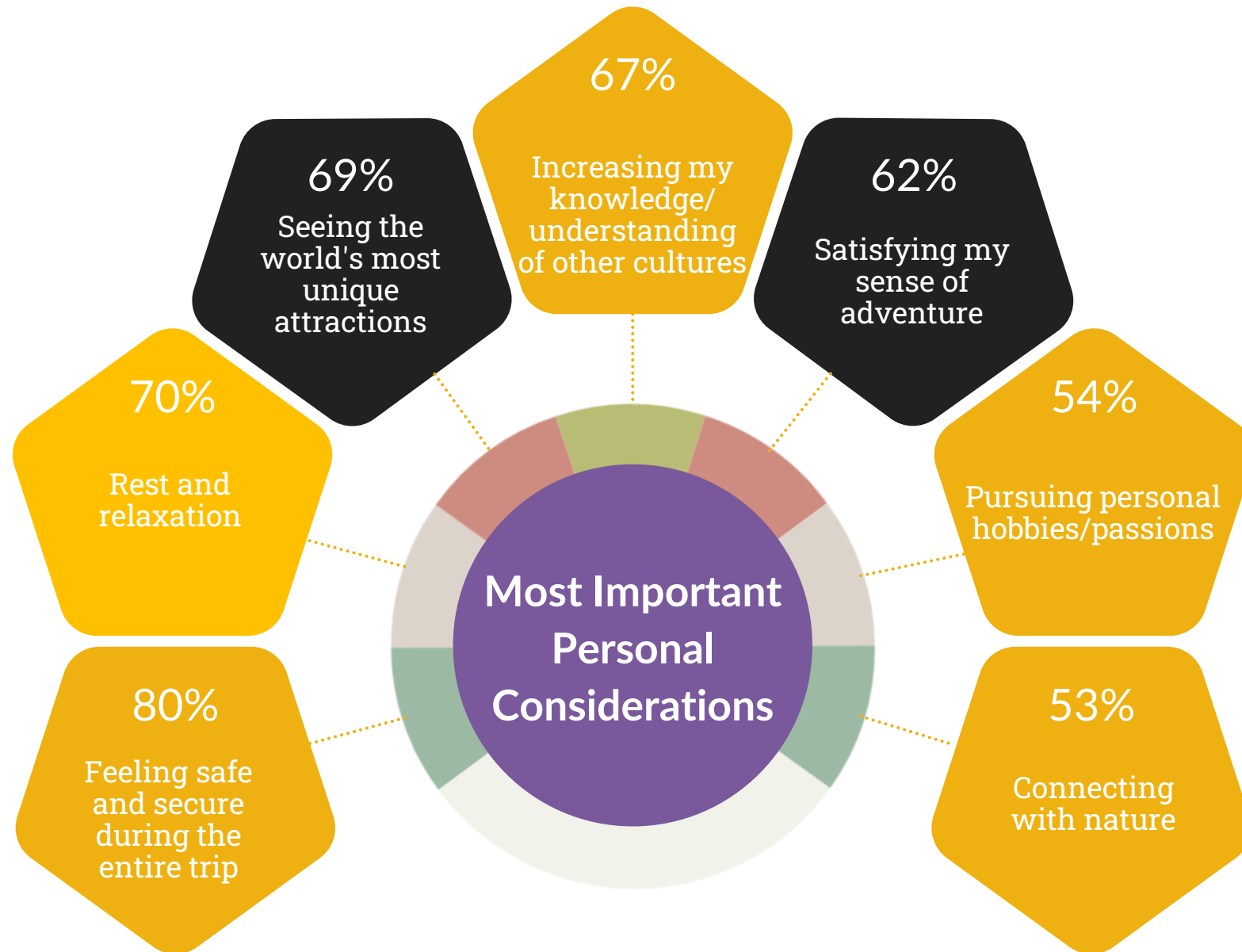
# 0.5

**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

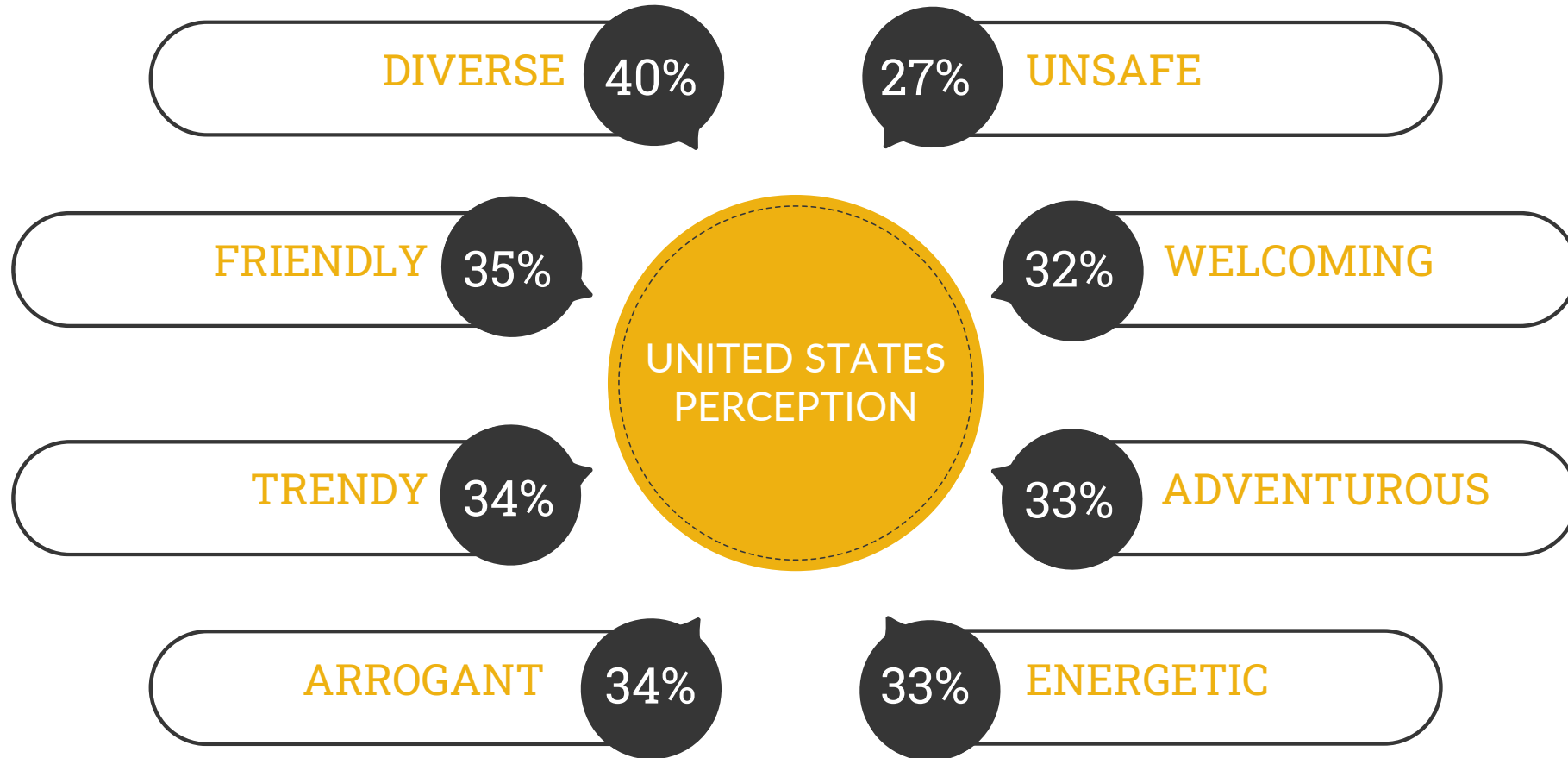
## Most Discouraging From Visiting a Destination

- 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)

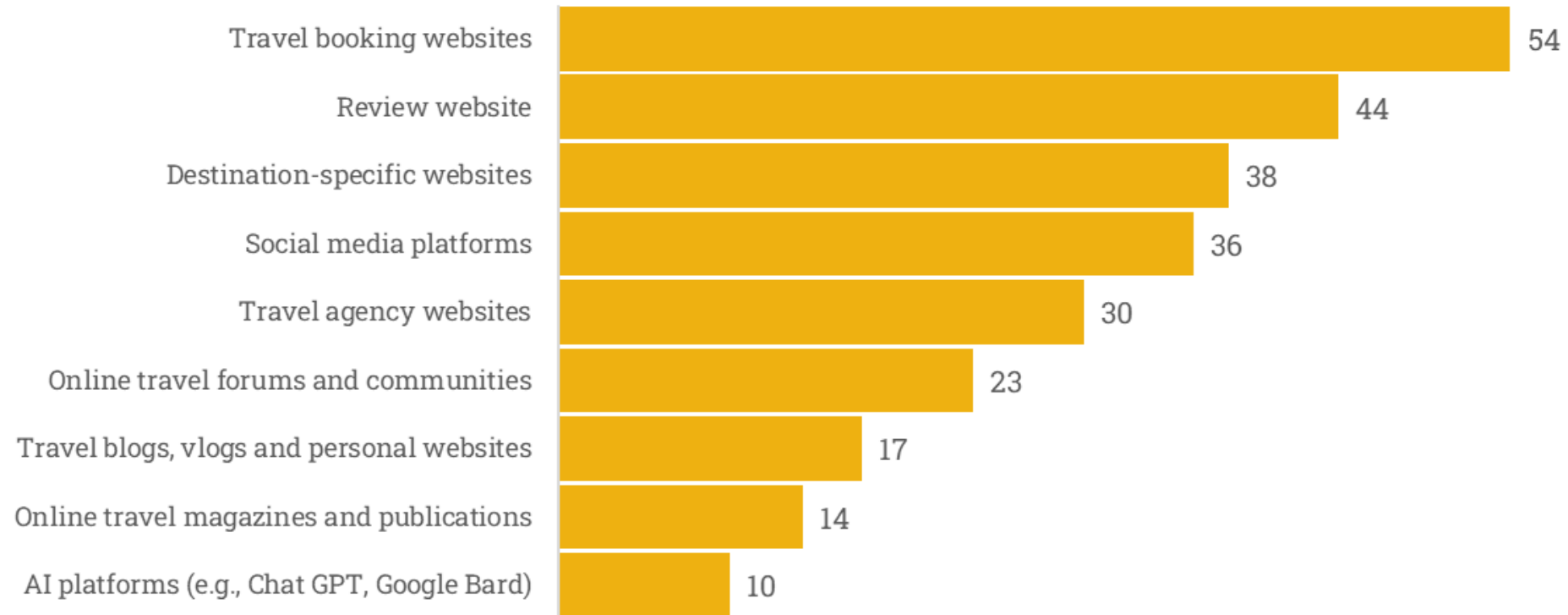
## Sources of Information for Destination Selection (%)



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 <i>2024</i>	REAL GDP GROWTH <i>2025 PROJECTION</i>	CURRENCY RATE BRITISH POUND 2024	INFLATION RATE <i>2025 PROJECTION</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. GOODS &amp; SERVICES EXPORTS</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. SERVICES EXPORTS</i>
69M	1.5%	0.78	2.1%	8.4%	15.4%

# UNITED KINGDOM

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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
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- 12% Level of crowds
- 10% Touristy attractions to avoid
- 9% Outdoor activities (biking, boating, hiking, etc.)
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- 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

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## APPEAL

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



## FAMILIARITY

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

# UNITED KINGDOM

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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%

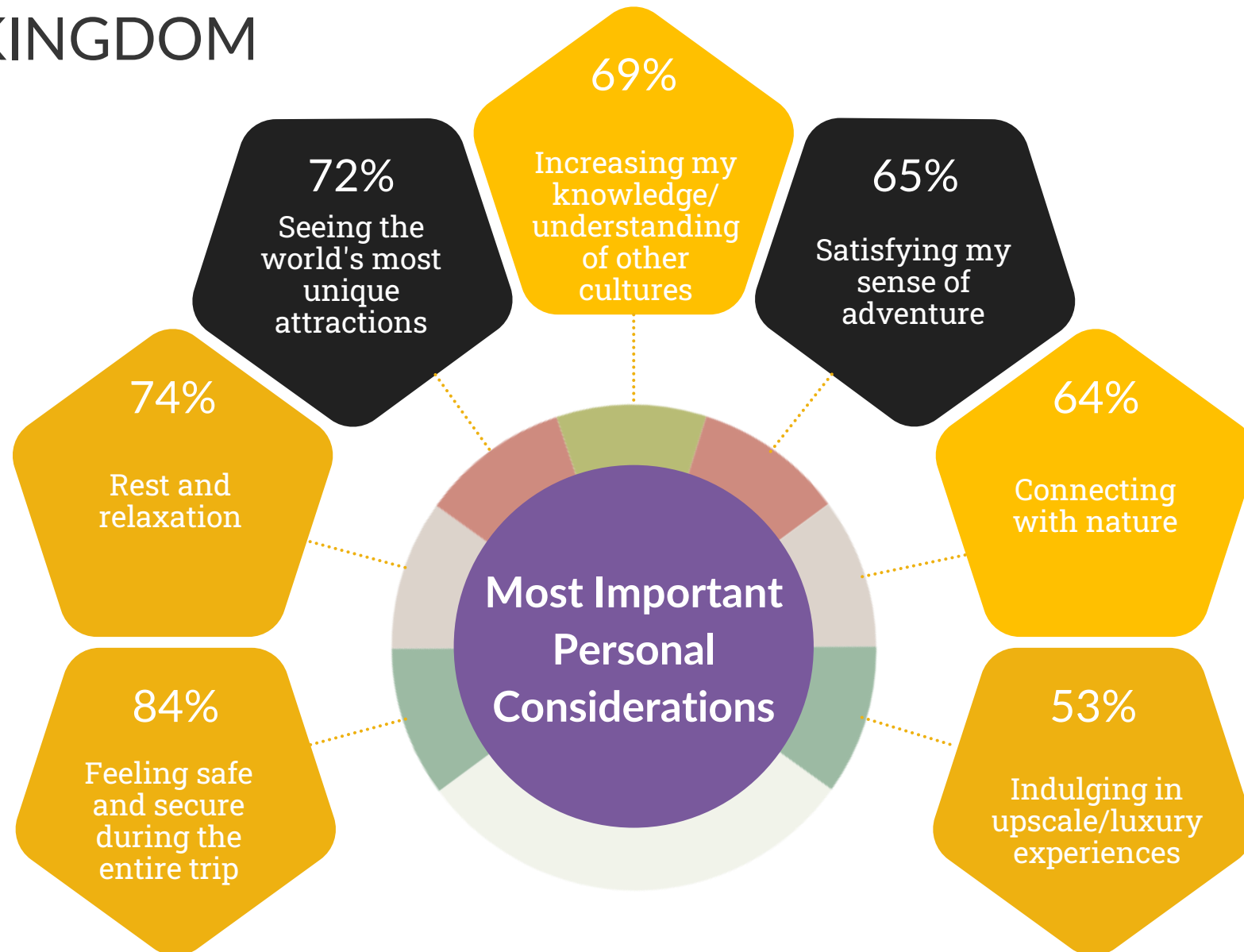
0.7

**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

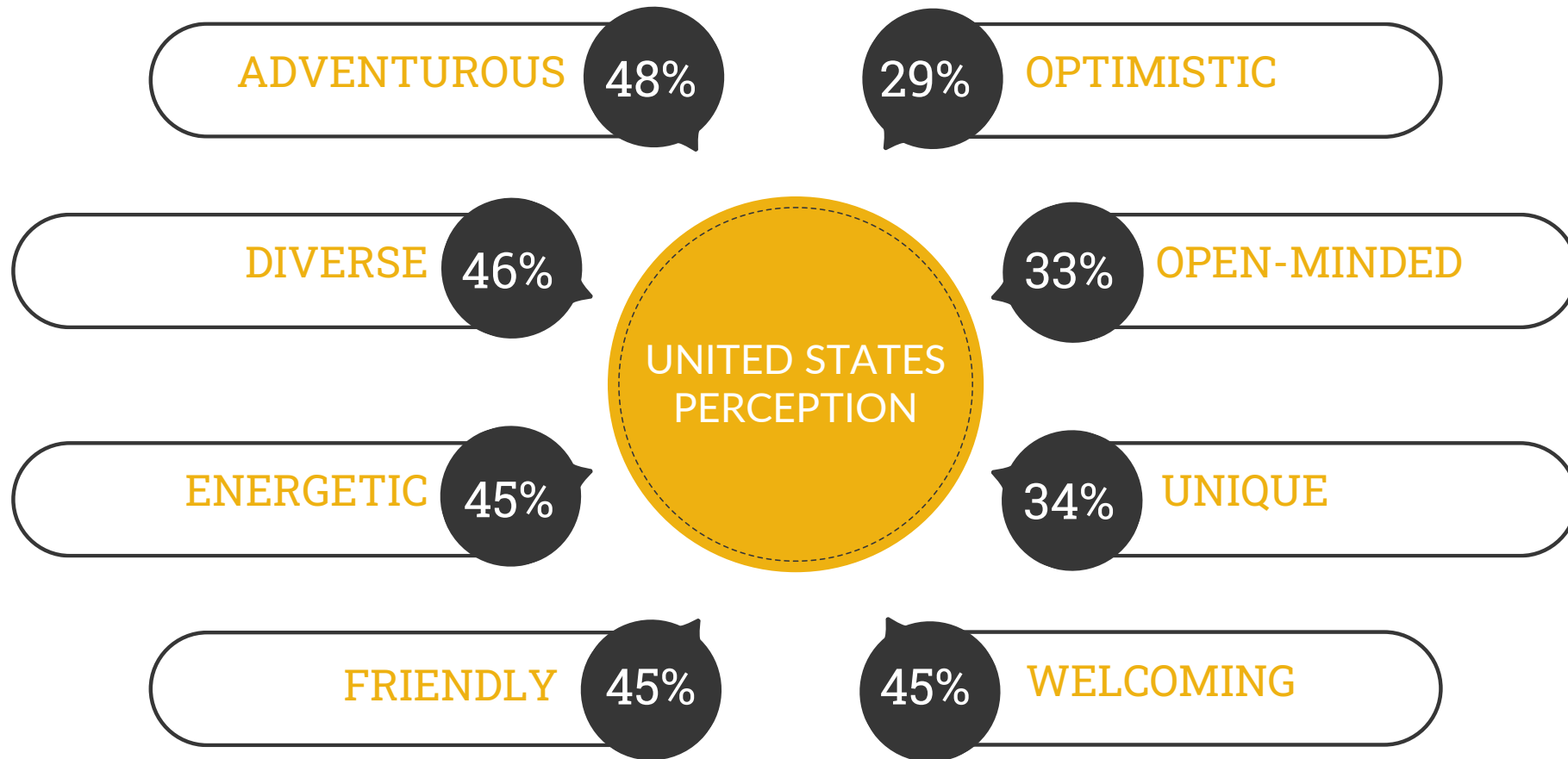
## Most Discouraging From Visiting a Destination

- 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)

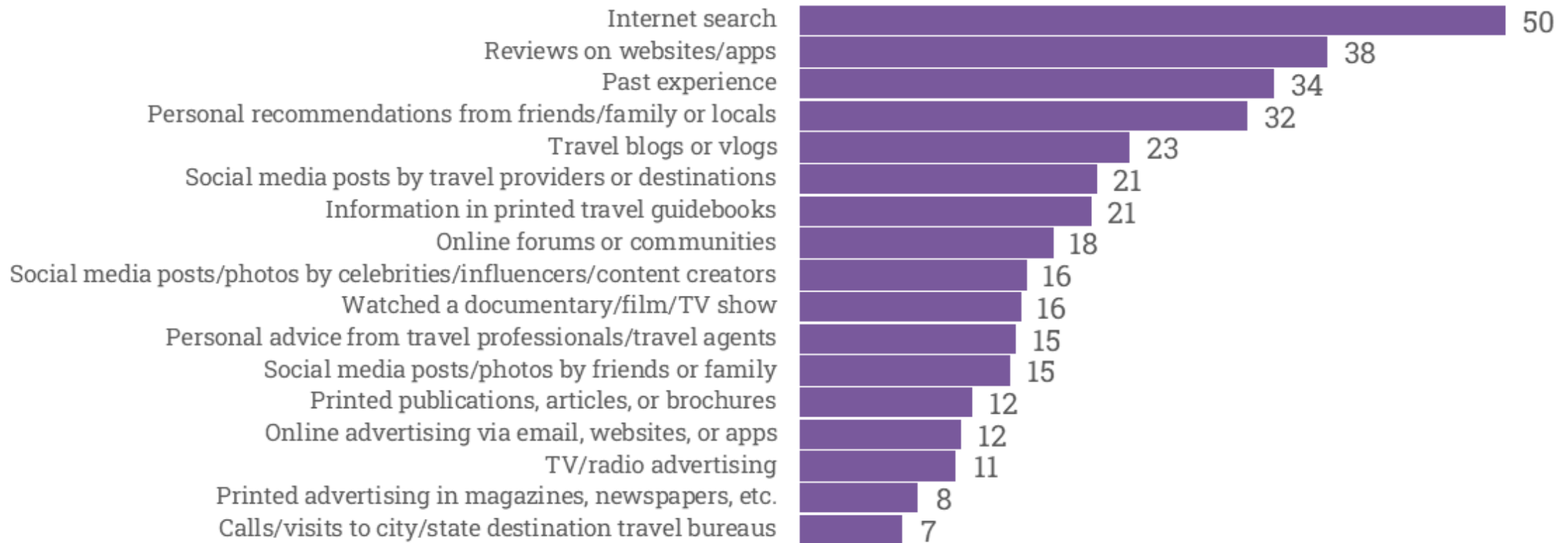
# UNITED KINGDOM



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

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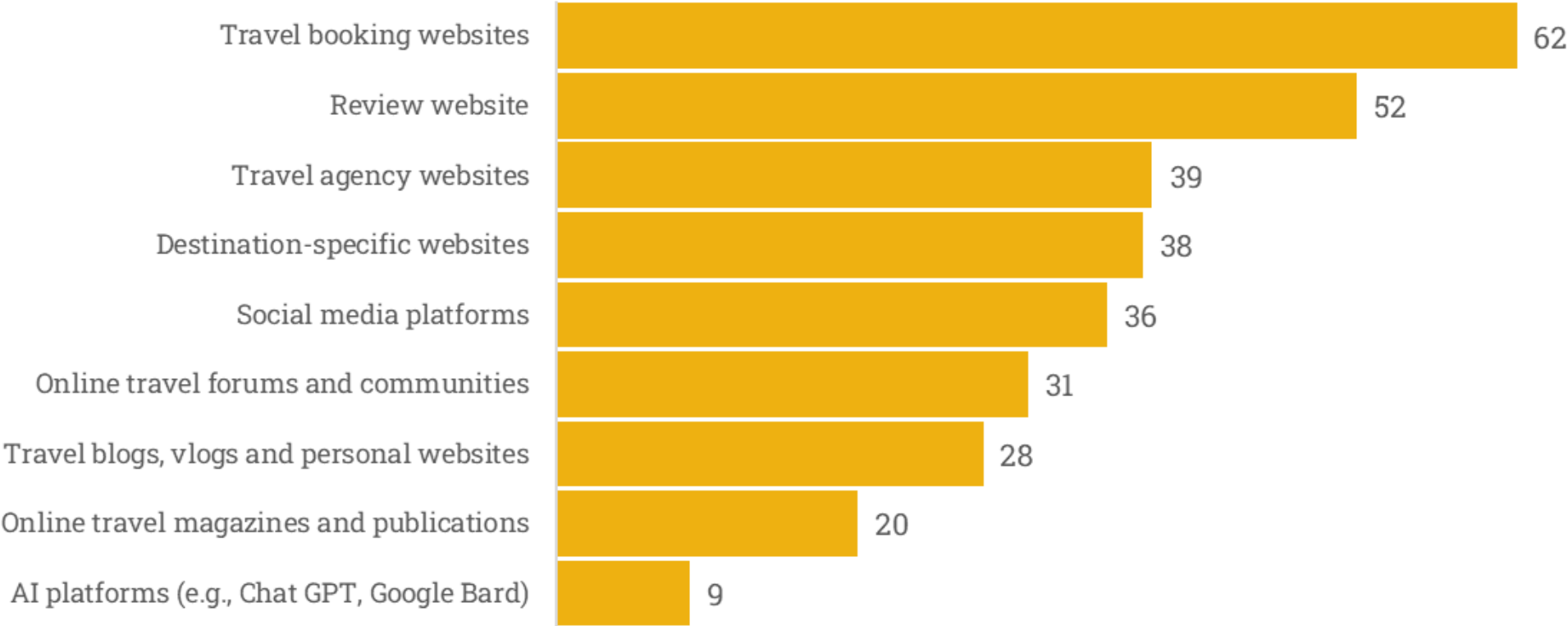
## Sources of Information for Destination Selection (%)



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)

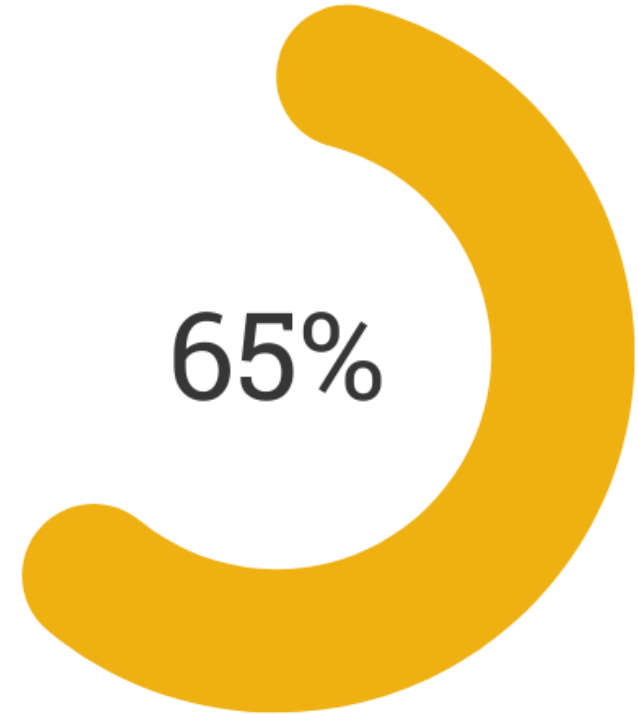
# GERMANY

---



## 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**

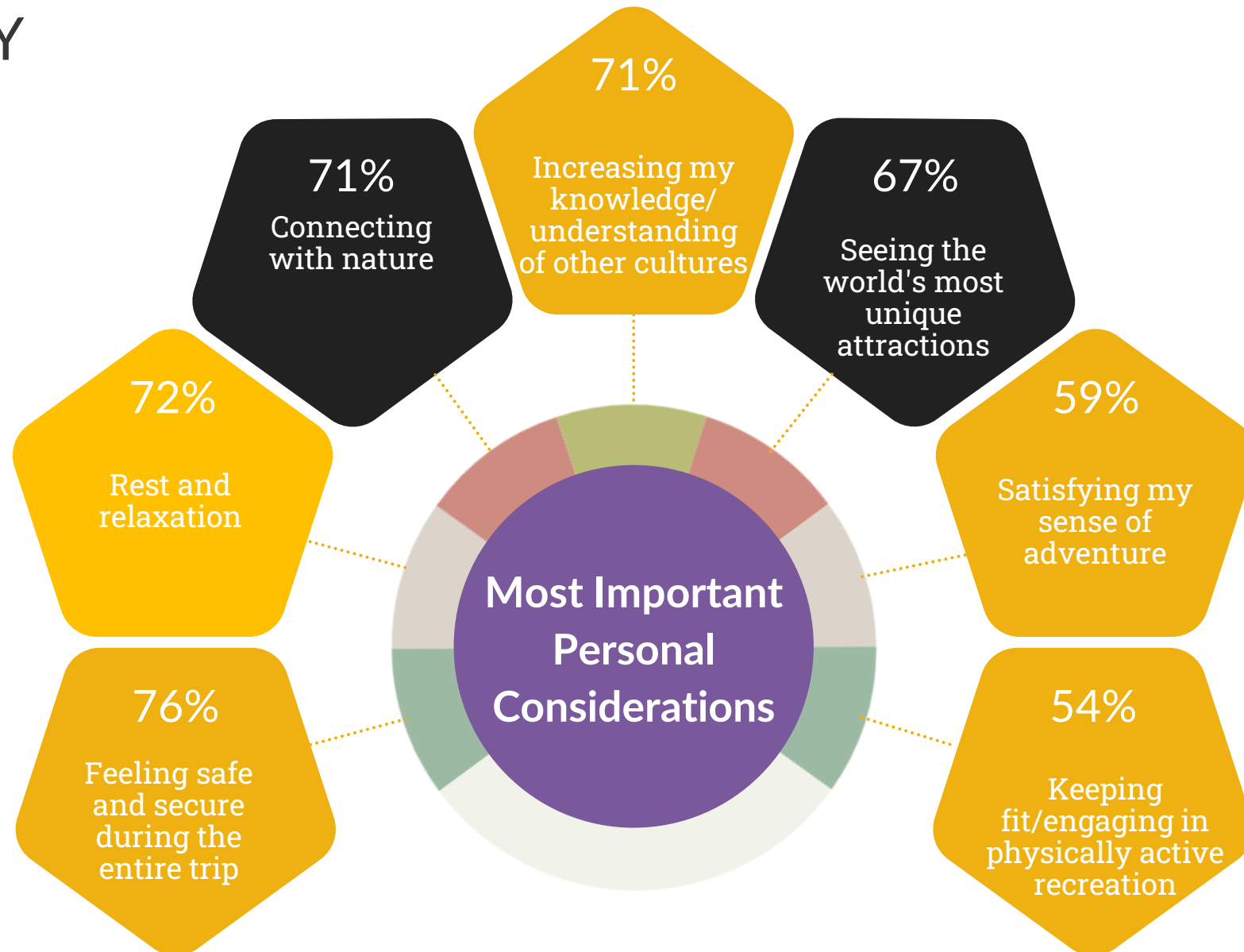
---

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

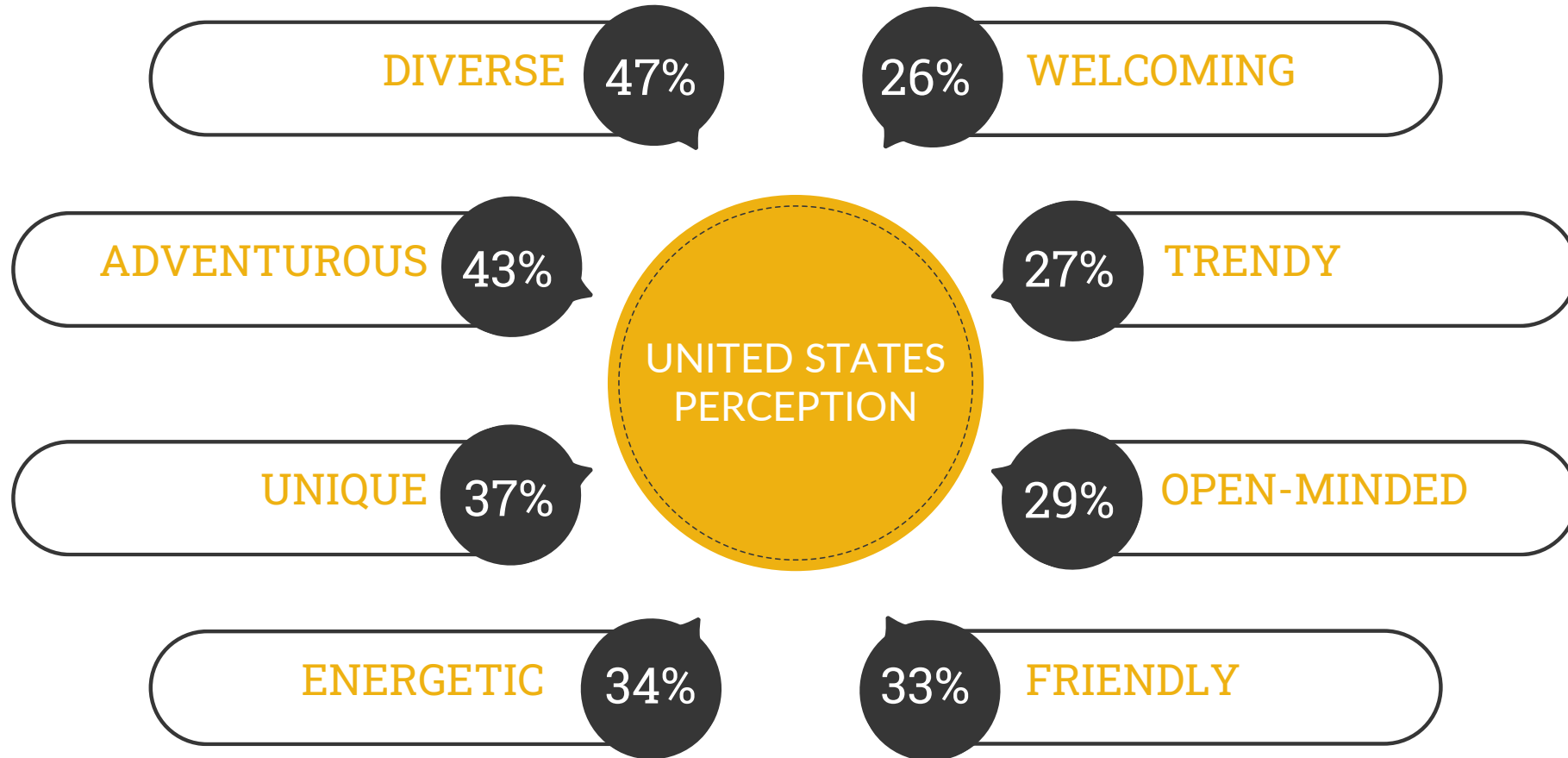
## Most Discouraging From Visiting a Destination

- 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)

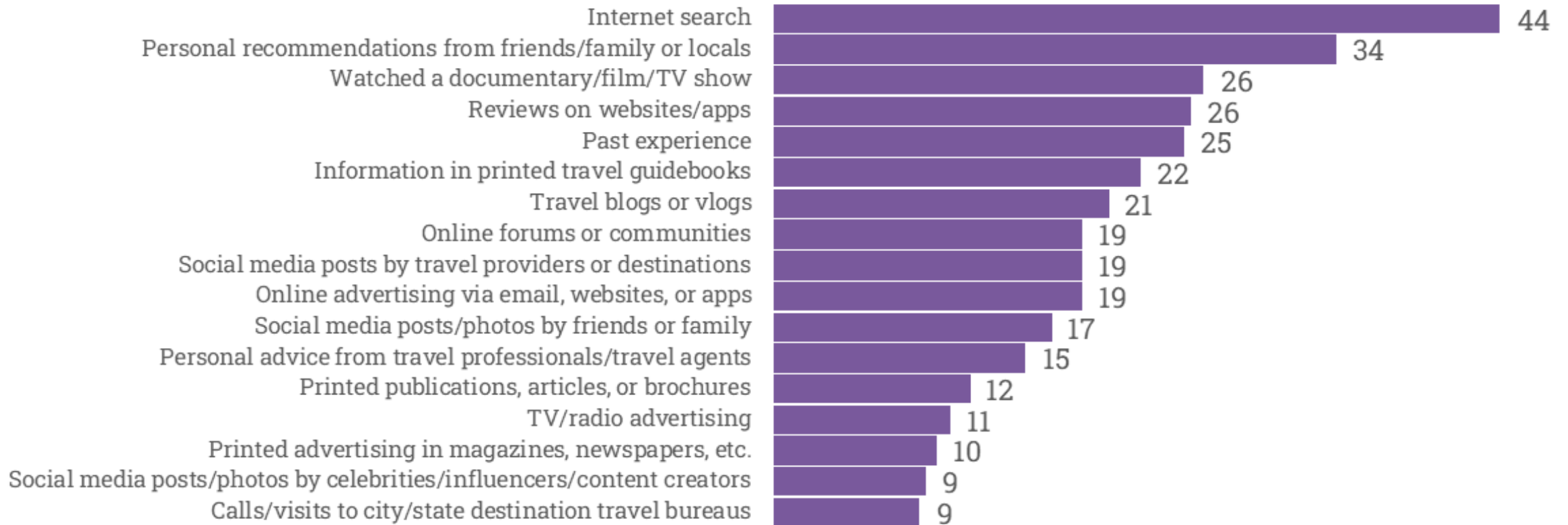
# GERMANY



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 (%)

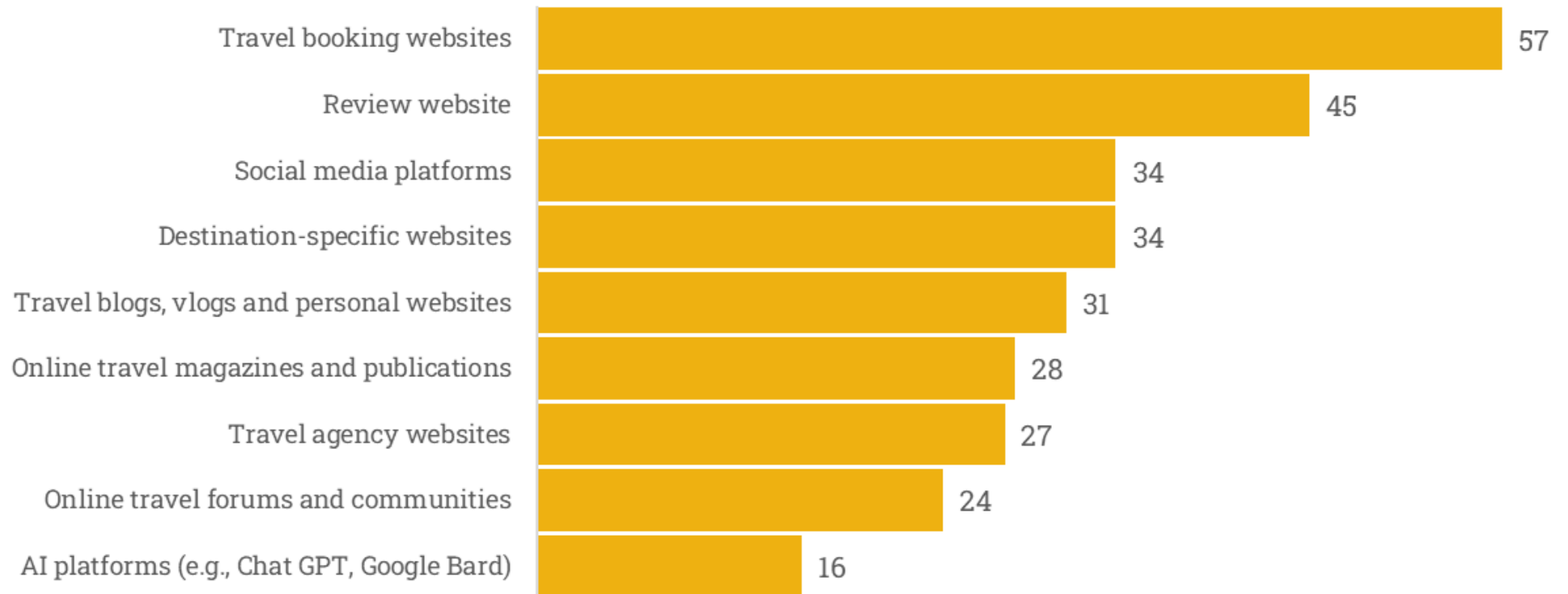


Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

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

# JAPAN



POPULATION  
*2024*

124M

REAL GDP  
GROWTH  
*2025 PROJECTION*

1.1%

CURRENCY  
RATE  
JAPANESE YEN  
2024

151.35

INFLATION  
RATE  
*2025 PROJECTION*

2.0%

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

5.9%

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

16.4%

# JAPAN

---

32%

Likelihood to Visit Travel South  
in the next Five Years

Note: Japanese visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:



- 46% Hotels and lodging
- 46% Safety
- 44% Restaurants and food
- 32% Shopping
- 26% Transportation and how to get around
- 26% Sightseeing tours
- 23% Historical attractions
- 21% Ways to experience nature
- 21% Entertainment, events, shows
- 21% Museums and culture
- 19% Theme parks
- 19% Availability of direct flight service
- 19% Family fun
- 15% National Parks
- 15% Opportunities for relaxation
- 11% Professional sporting events
- 9% Ways to experience the American lifestyle
- 9% Touristy attractions to avoid
- 9% Sample trip itineraries
- 9% Ideas for adventurous travel
- 9% Important or iconic attractions
- 8% Outdoor activities (biking, boating, hiking, etc.)
- 8% Beaches
- 8% Level of crowds
- 6% Things to do outside the large cities
- 6% Off-the-beaten path attractions
- 6% Recommendations from residents
- 5% Commitment to being an eco-friendly/sustainable place
- 3% Snow/winter activities (skiing, sledding, etc.)

Source: Future Partners (2025)

# JAPAN

---

Recall of “Buzz”: Travel South  
Destinations

30%

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



Note: Japanese visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

# JAPAN

---



67%

A donut chart with a thick yellow ring representing 67% of the total. The ring is composed of two segments: a larger one on the right and a smaller one on the left. The center of the chart is white and contains the text '67%'.

## APPEAL

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



60%

A donut chart with a thick yellow ring representing 60% of the total. The ring is composed of two segments: a larger one on the right and a smaller one on the left. The center of the chart is white and contains the text '60%'.

## FAMILIARITY

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

# JAPAN

---



1 Trip

---

29%

2 Trips

---

27%

3-4 Trips

---

24%

5+ Trips

---

20%

# 3.4

## Average Number of Leisure International Trips

Note: Japanese 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)



# JAPAN

---



# 1.3

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

**1+ Trips**

---

44%

**1 Trip**

---

21%

**2 Trips**

---

7%

**3+ Trips**

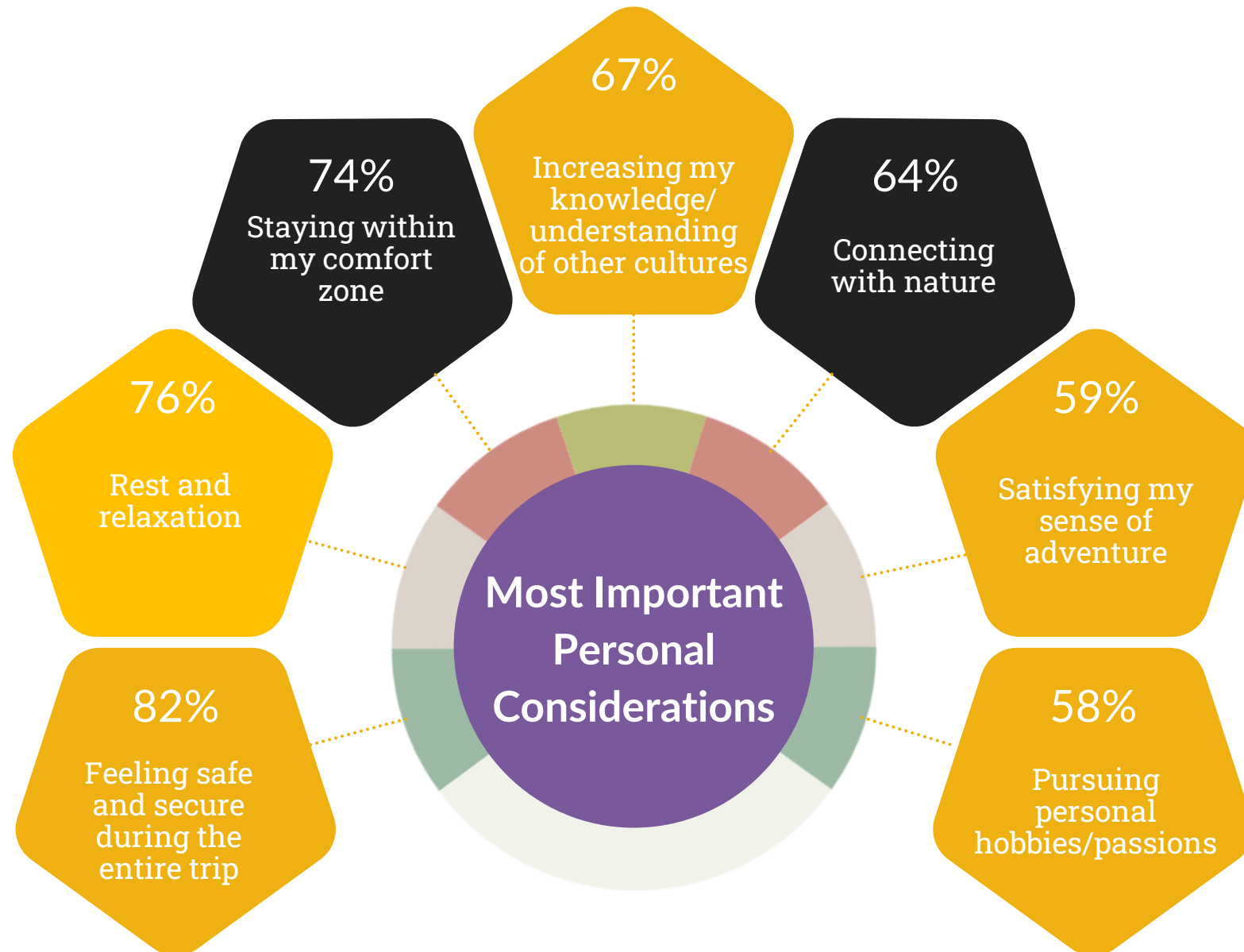
---

16%

Note: Japanese 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)

# JAPAN



Note: Japanese 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)

# JAPAN

## Most Important When Choosing a Destination

- 76%** Appeal of local culture
- 76%** Accommodation options
- 74%** Climate or weather at the destination
- 74%** Leisure attractions
- 72%** Natural features/landscapes
- 70%** Ease of travel to the destination
- 67%** Landmarks and sightseeing options
- 61%** Reputation/popularity as a travel destination

## Most Discouraging From Visiting a Destination

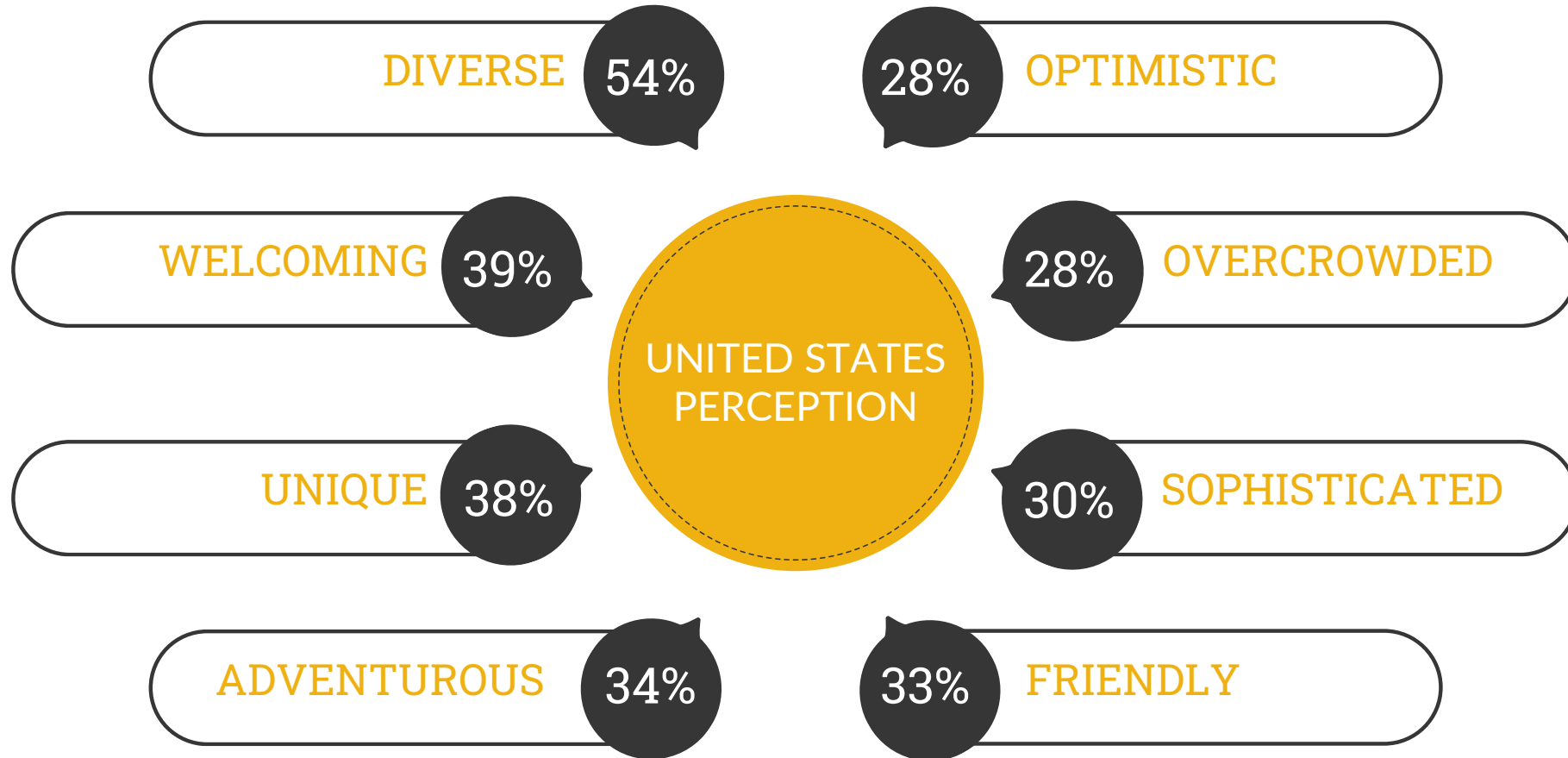
- 56%** Personal safety concerns
- 54%** Uncleanliness in the destination
- 43%** Lack of information for planning trip & at destination
- 38%** High prices
- 38%** Political climate not aligning with personal views
- 37%** Crowdedness
- 35%** Inconvenience of travel to the destination
- 33%** Currency conversion rate

Note: Japanese 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)

# JAPAN

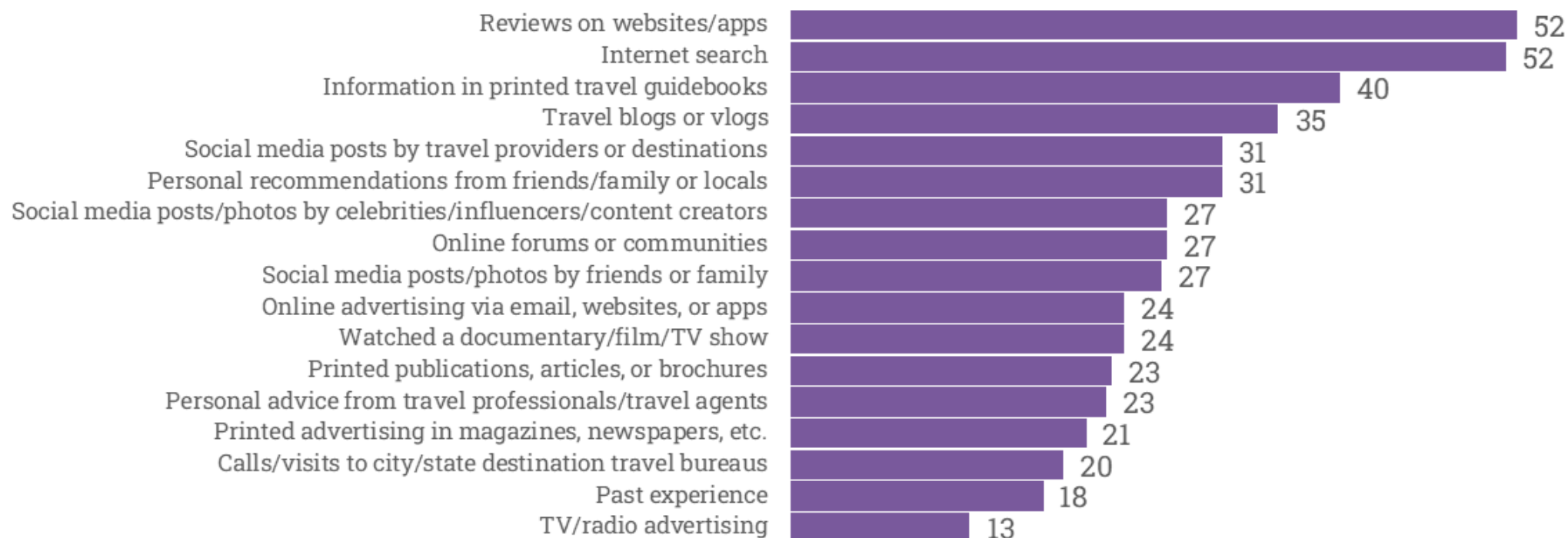
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Note: Japanese visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

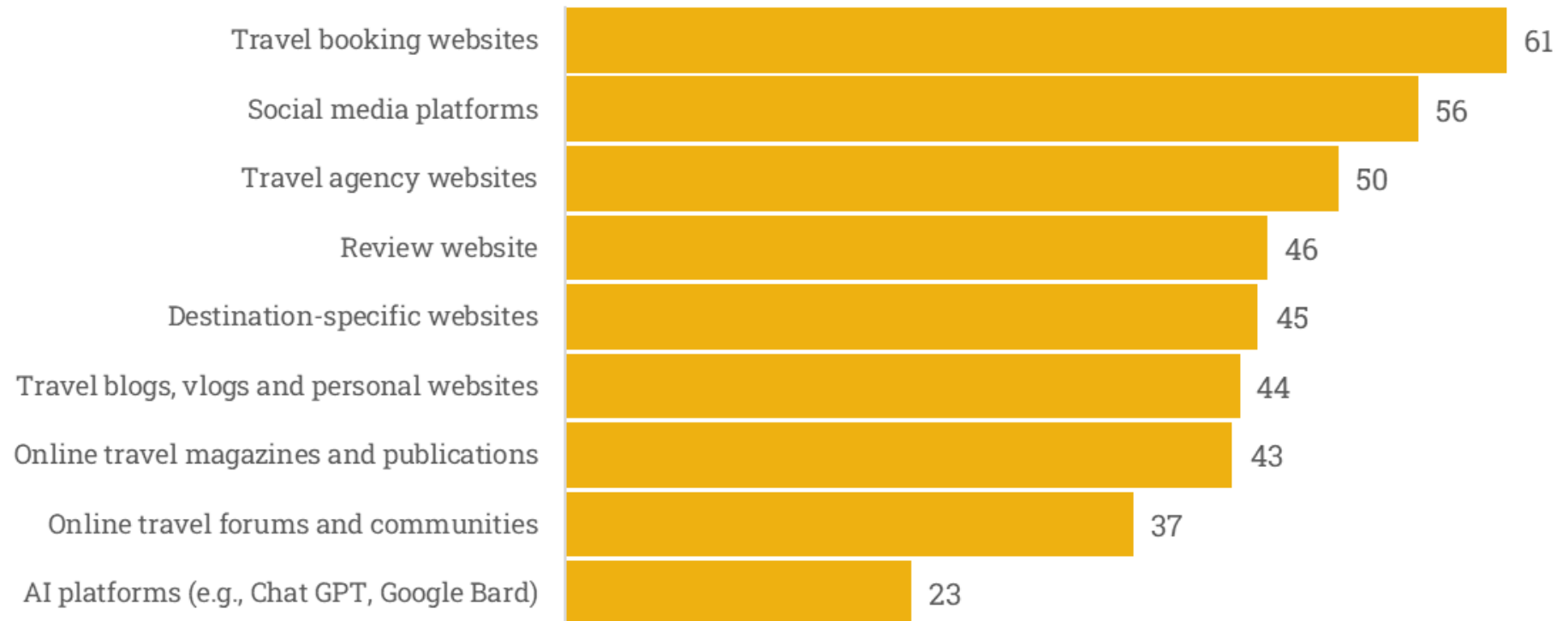
## Sources of Information for Destination Selection (%)



Note: Japanese 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: Japanese 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	81 %
Twitter/X	65 %
Instagram	61 %
Facebook/META	55 %
Tik Tok	51 %
Pinterest	26 %
LinkedIn	18 %
Snapchat	17 %
Reddit	17 %
Tumblr	11 %

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

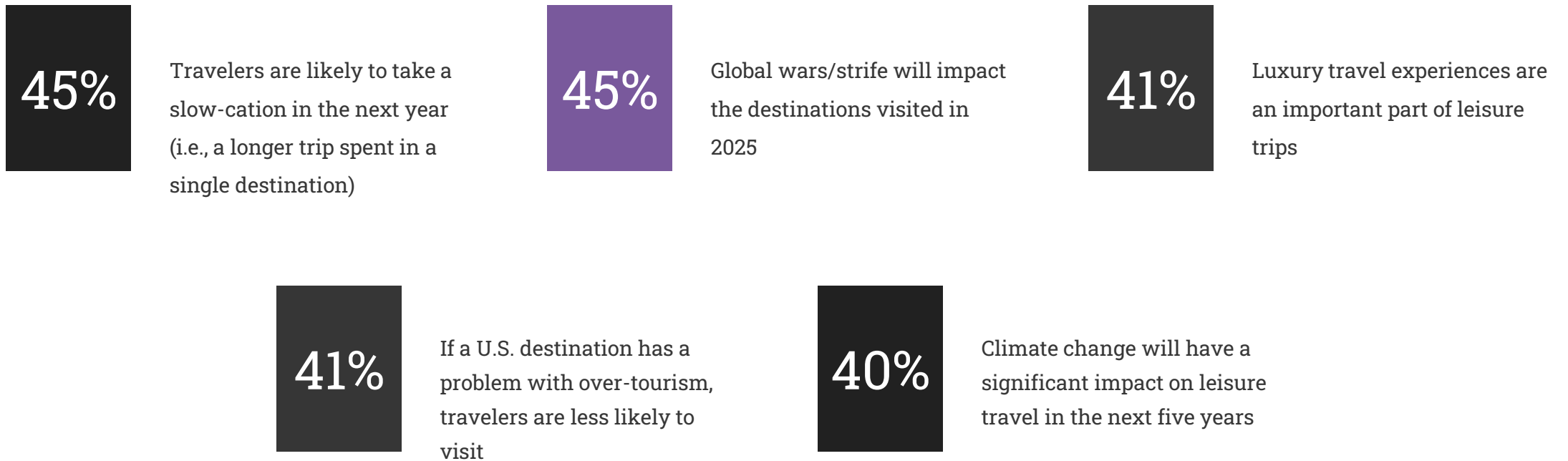
Source: Brand USA (Aug. 2024)

# JAPAN

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## Likelihood of how 2025 will evolve:

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





# 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

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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.

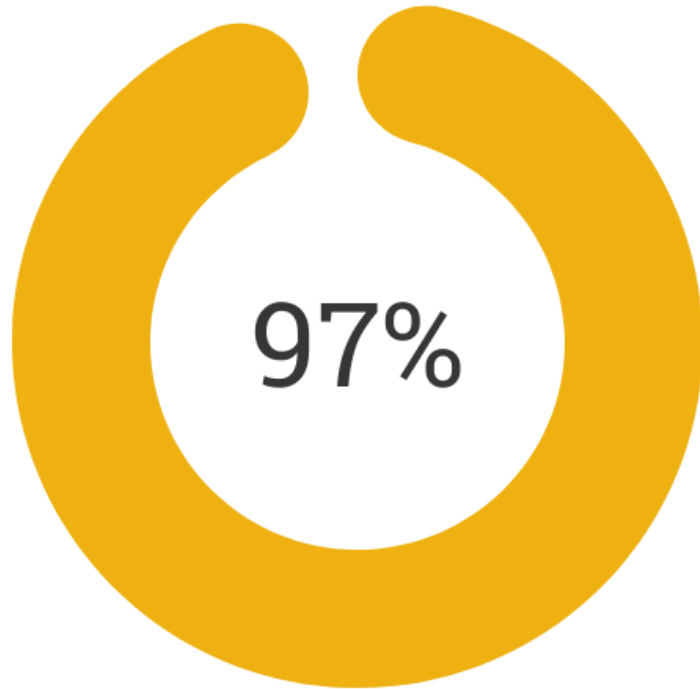


Note: Indian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

# INDIA

---



## 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%

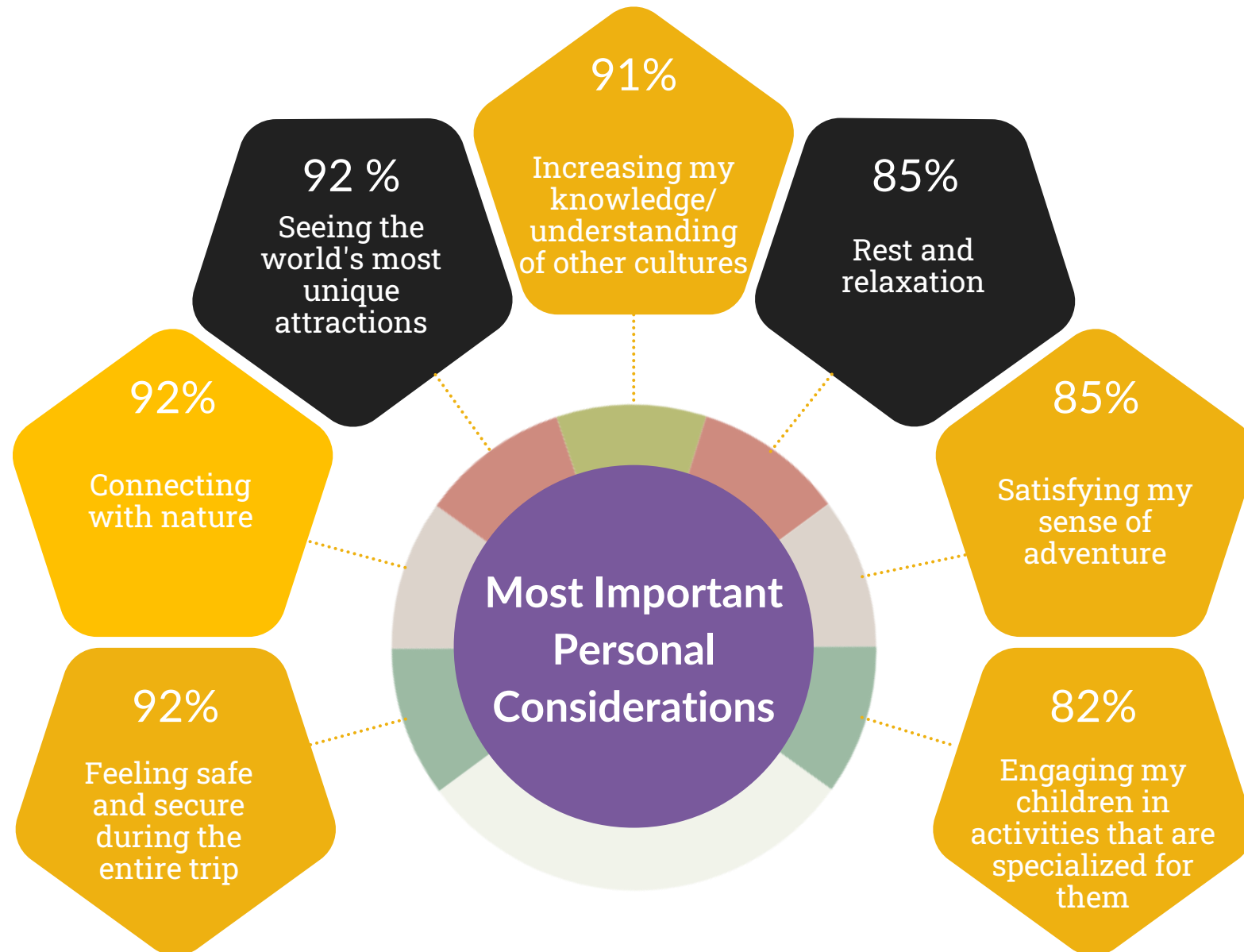
# 2.5

**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

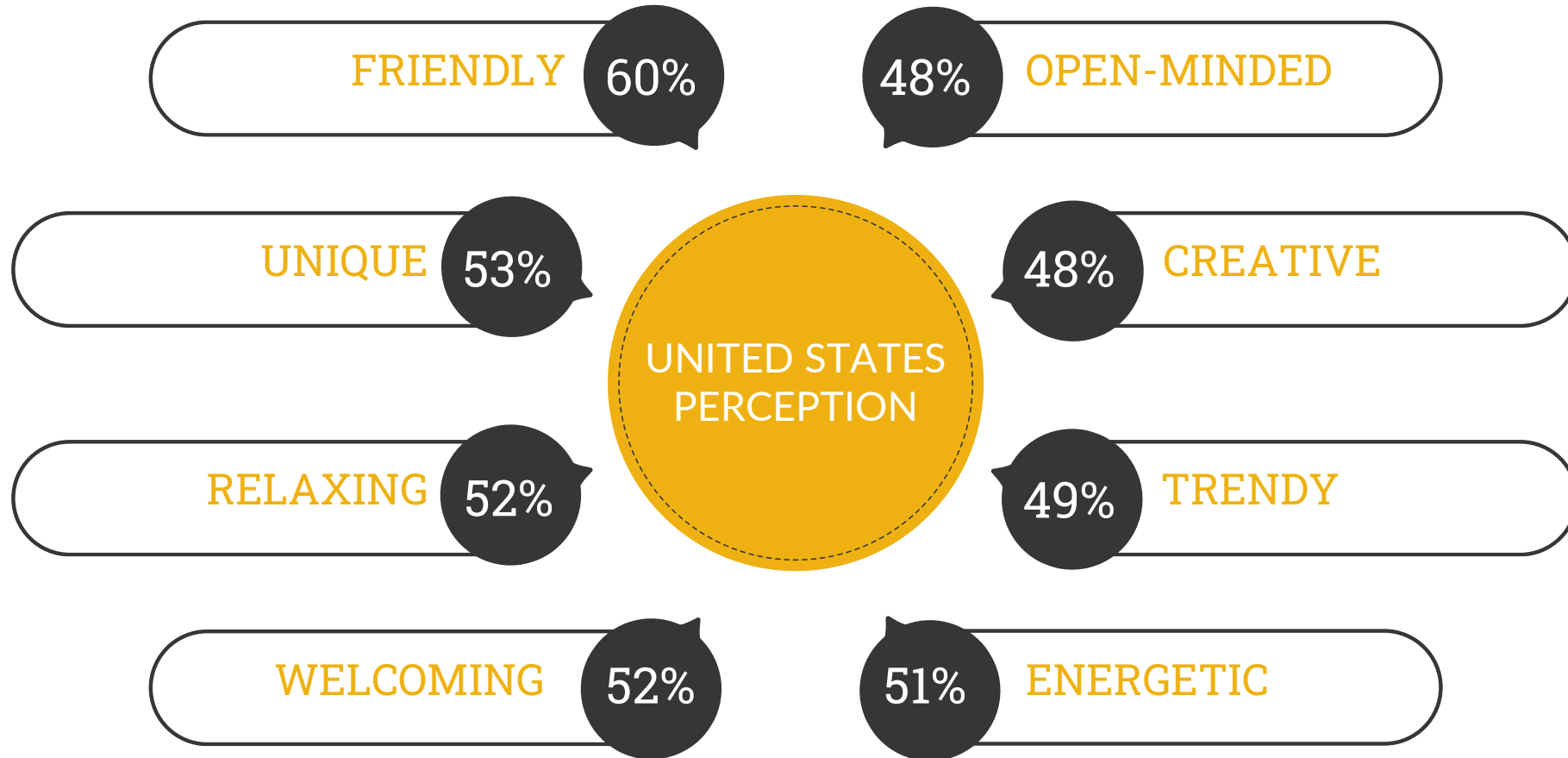
Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)



# INDIA

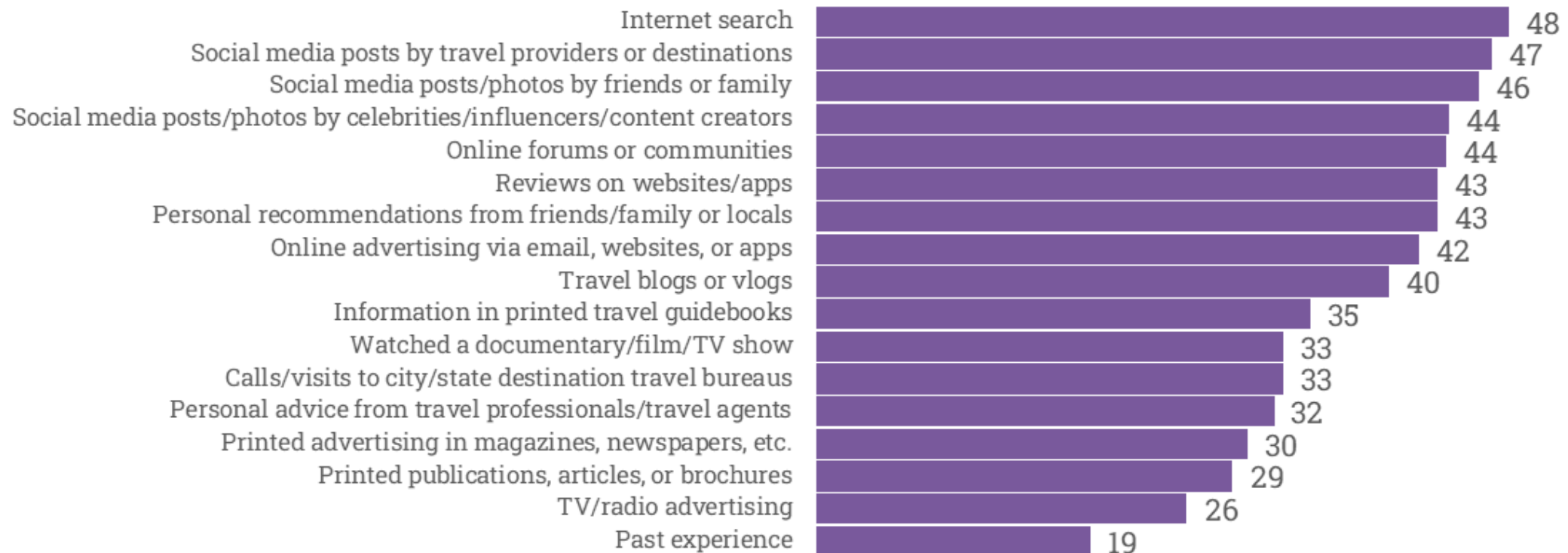
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Note: Indian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

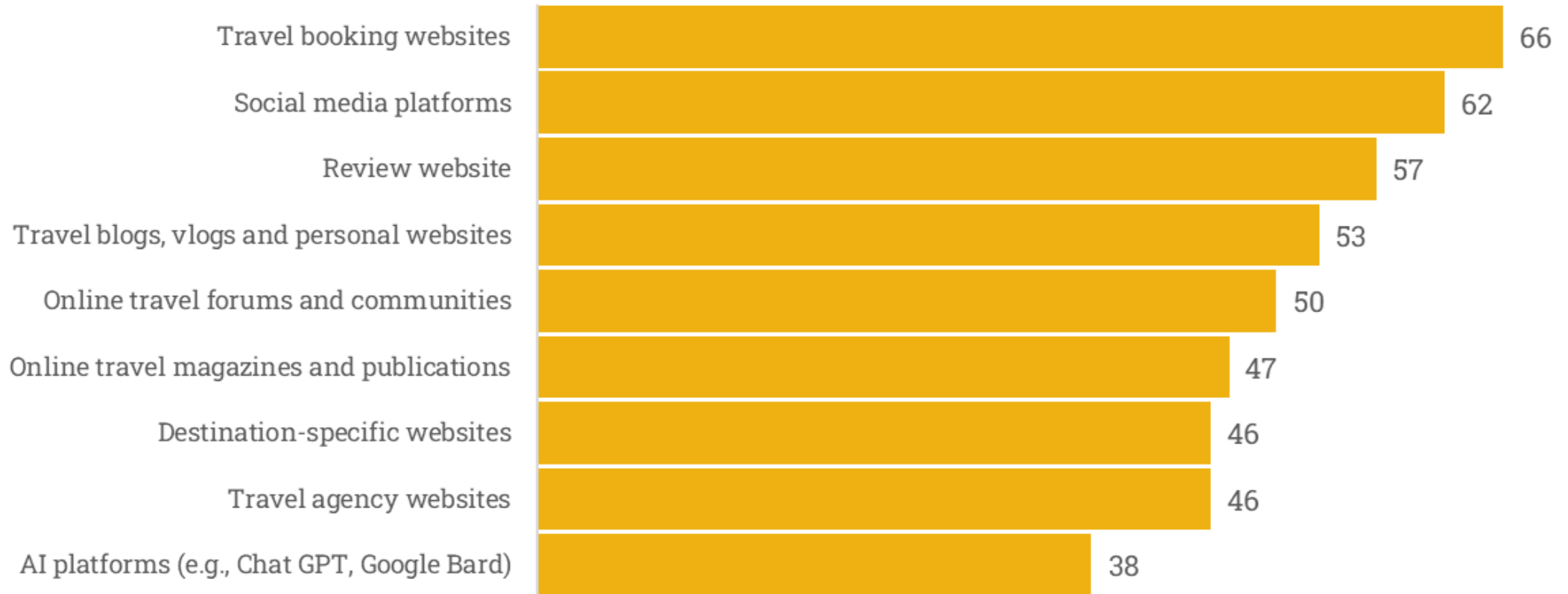
## Sources of Information for Destination Selection (%)



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

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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

# Resources



# Market Profiles

## Global Partner Program

