

TRAVEL · SOUTH  USA

LOUISIANA

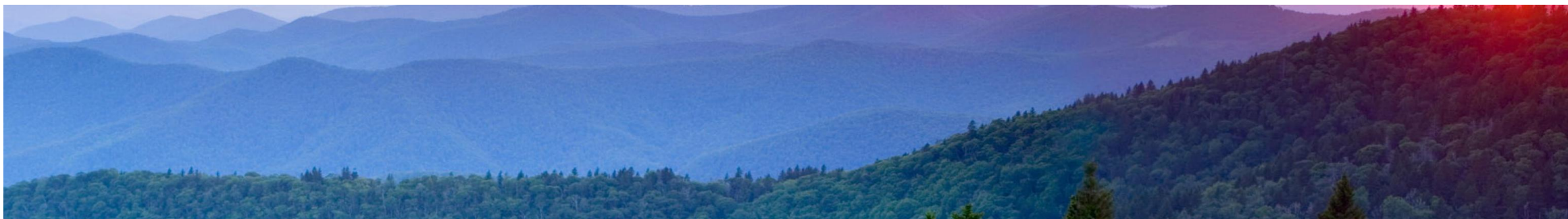


**INTERNATIONAL MARKETS**

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

# Louisiana's International Visitor Economy



*Highlighting the State's Global Interconnectivity*



## Outlook

- By 2025, forecasted to reach **\$848 million and 554,000** visitors

## US Inbound Travel Rebound

- International inbound spending is expected to decline by 6% from 2024, a 6% decrease compared to 2019.
- **Japan, India and Brazil** are projected to grow in 2025, with **Australia** remaining flat.
- Fueled by visitors from **Canada, United Kingdom/Ireland, Australia, DACH Region, France, Brazil, India, The Nordics, China and South Korea**, accounting for **69%** of the state's international tourism expenditures

## Exports by Market

- **3,000** companies exported **\$87 billion** worth of goods
- Exports to **China, Mexico, the United Kingdom, Germany and Canada** are among the top origin markets of visitation
- **China and India** account for one out of four of the international student population
- **80%** of visits are non-business related



# Louisiana's International Visitor Economy

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

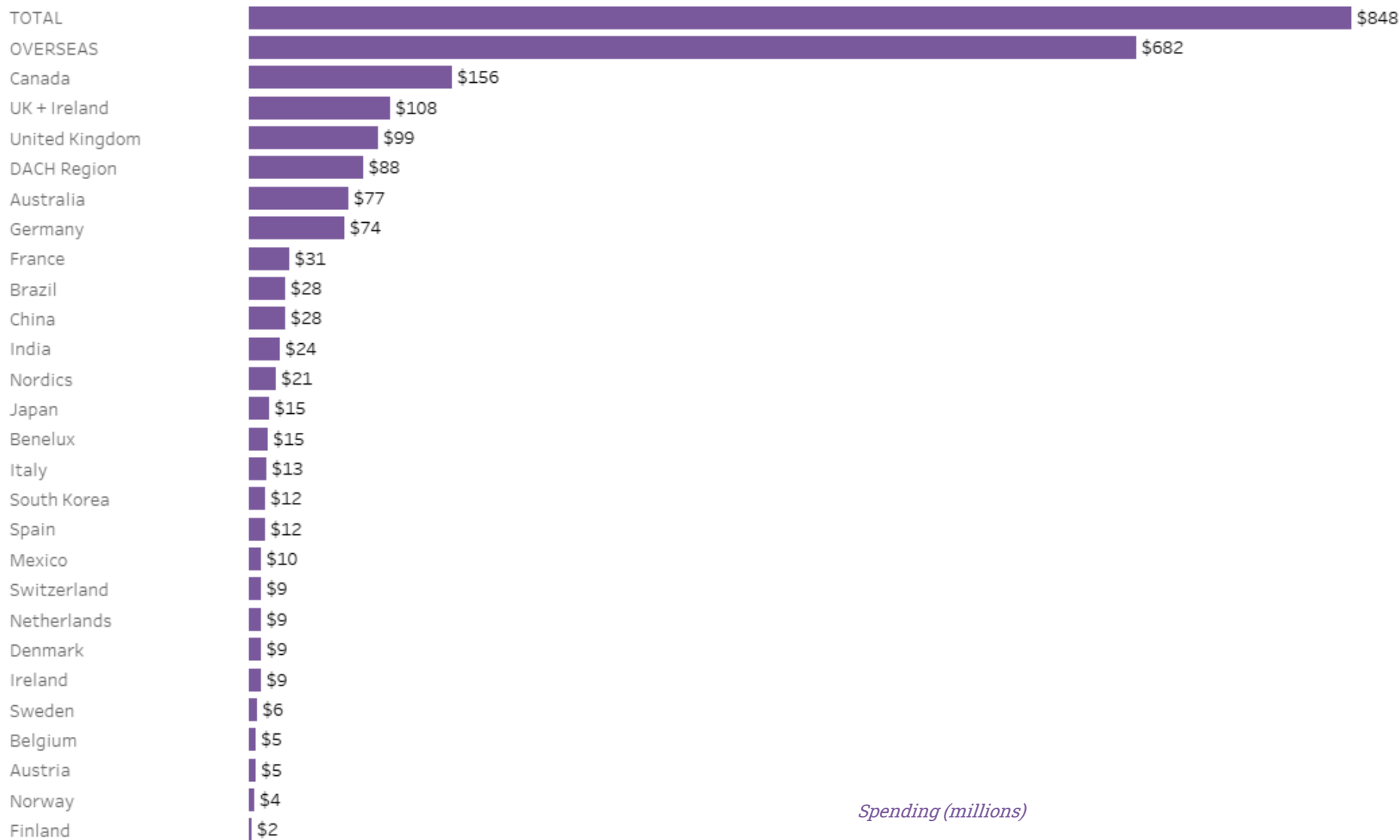
- Louisiana's investment in regional marketing amplifies the state's brand internationally and targets high-value travelers, enhancing regional economies and diversifying the visitor economy.
- Collaborative marketing efforts under Travel South USA (TSUSA) further strengthen Louisiana's strategic advantage.
- In addition to Louis Armstrong New Orleans International Airport, major gateway airports like Atlanta, Charlotte, Chicago O'Hare, and Dallas - allow easy access to the state.
- Proximity to neighboring states— Arkansas and Mississippi —attracts international travelers interested in the Travel South's natural beauty, cultural heritage, and connectivity, thus enriching Louisiana's tourism landscape.



# Visitor Economy

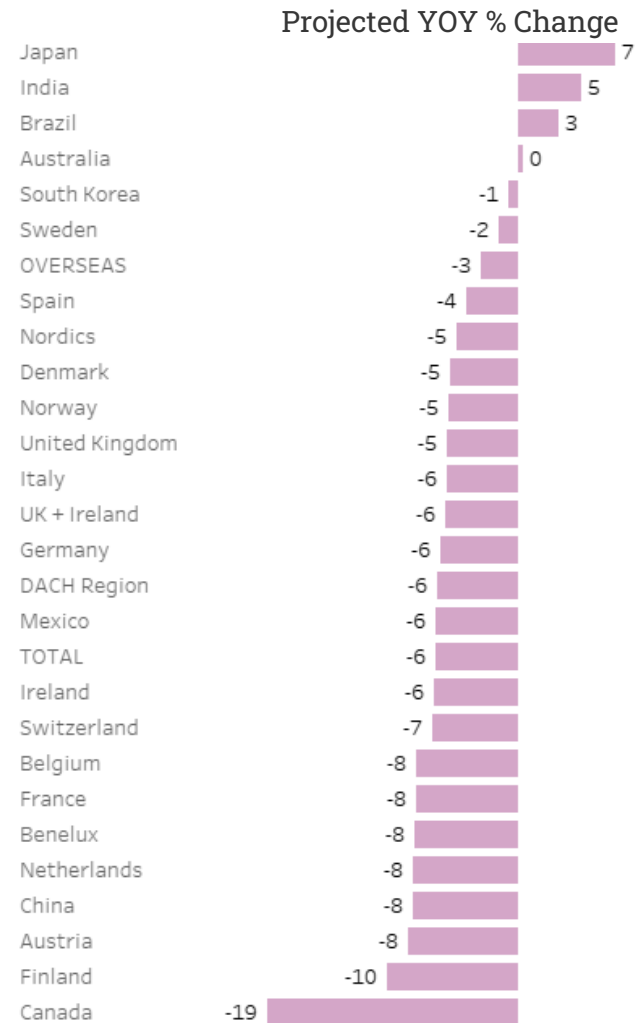
*April 15, 2025*

# 2025 Outlook: Visitor Spending by Key Markets

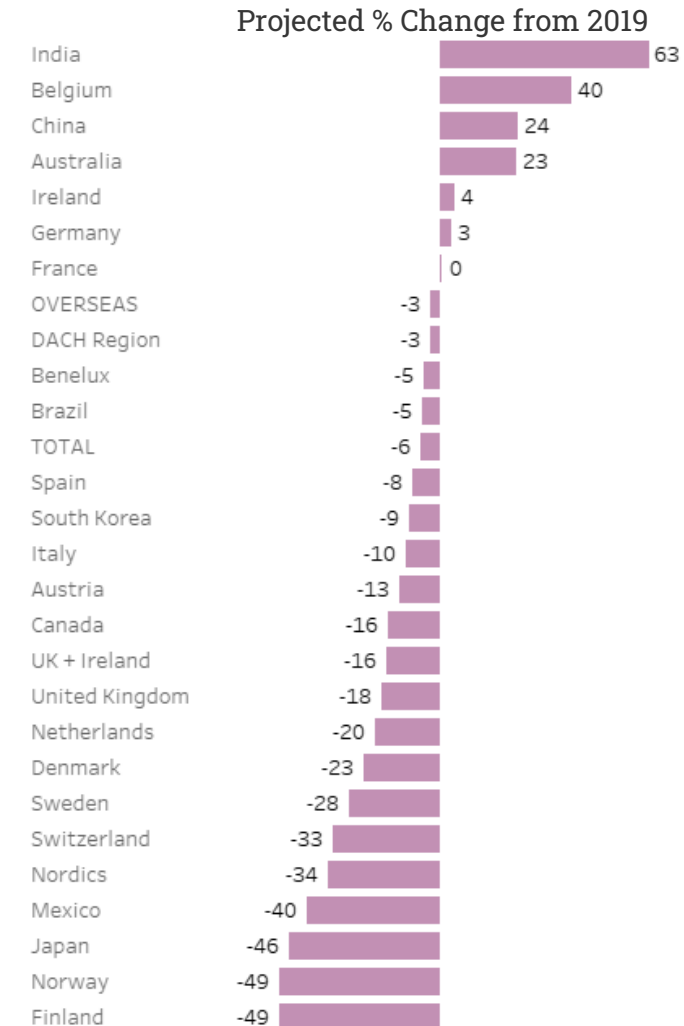


Spending (millions)

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



# 2019 Baseline Comparison

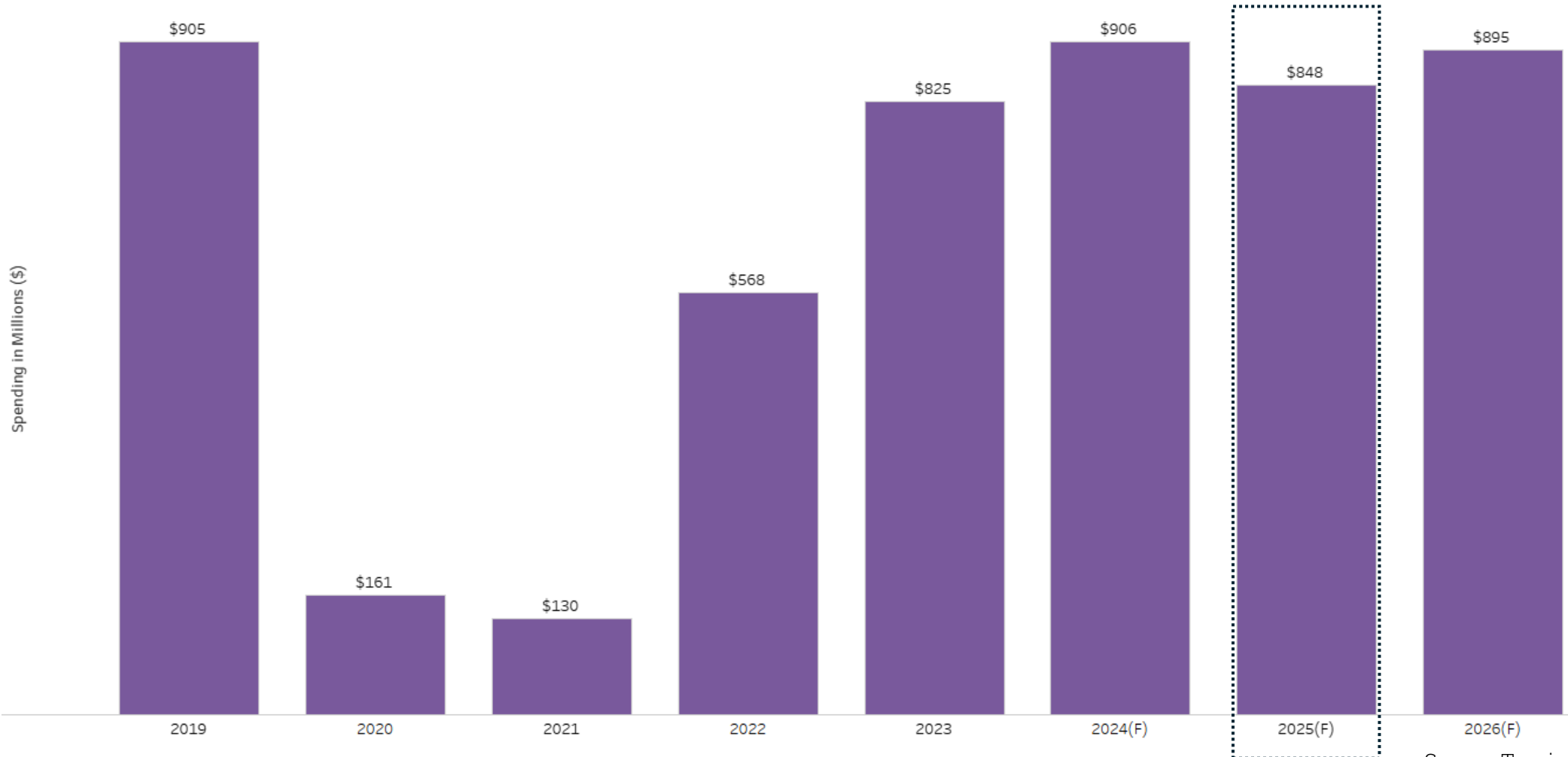




# LOUISIANA



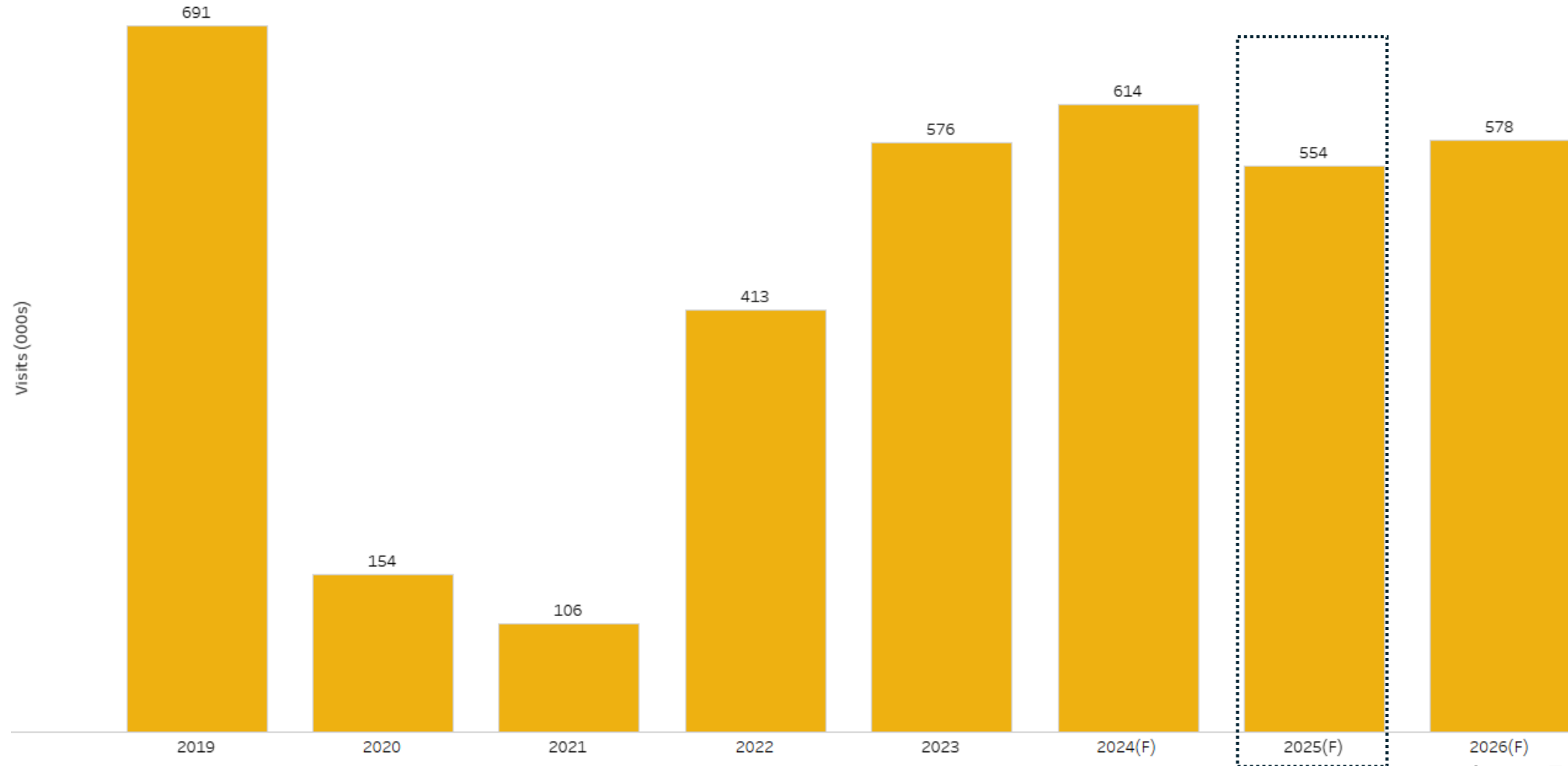
2025 Spending Outlook: Down 6% from 2024, still below 2019



# LOUISIANA



2025 Visitor Volume Outlook: Down 10% from 2024, still below 2019



# LOUISIANA



## \$848M Projected Spend and 554,000 Visits in 2025, down 6% and 10% from 2024

- Tourism Economics estimates **Overseas spending** to decline by **3%** year-over-year (yoy) in **2025** – **Canada, a 19% decline**
- **India, Japan and Brazil** are projected to grow in 2025, with **Australia** remaining flat
- **Canada, U.K./Ireland, DACH Region, Australia and France** 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	848	-6	554	-10	-6	-20
OVERSEAS	682	-3	383	-5	-3	-20
Canada	156	-19	145	-21	-16	-23
UK + Ireland	108	-6	69	-7	-16	-23
United Kingdom	99	-5	63	-7	-18	-22
DACH Region	88	-6	54	-7	-3	-22
Australia	77	0	29	-1	23	-25
Germany	74	-6	46	-7	3	-20
France	31	-8	23	-9	0	-24
Brazil	28	3	13	-2	-5	-8
China	28	-8	12	-8	24	-32
India	24	5	14	1	63	66
Nordics	21	-5	12	-6	-34	-43
Japan	15	7	10	7	-46	-47
Benelux	15	-8	11	-9	-5	-26
Italy	13	-6	10	-7	-10	-31
South Korea	12	-1	6	-2	-9	-31
Spain	12	-4	9	-7	-8	-29
Mexico	10	-6	25	-8	-40	-3
Switzerland	9	-7	5	-7	-33	-38
Netherlands	9	-8	7	-9	-20	-32
Denmark	9	-5	3	-8	-23	-38
Ireland	9	-6	6	-6	4	-36

Source: Tourism Economics  
04.15.2025

# LOUISIANA



## \$848M Projected Spend and 554,000 Visits in 2025 (cont.)

Market	Spending (\$M)	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
Poland	8	5	5	-2	72	57
Ukraine	7	9	1	7	102	-49
Argentina	7	8	4	3	-15	-32
Sweden	6	-2	4	-5	-28	-37
Singapore	5	4	3	4	-5	-14
Philippines	5	0	3	1	-23	-18
Belgium	5	-8	4	-7	40	-8
Turkiye	5	5	3	2	153	33
Austria	5	-8	3	-9	-13	-14
Taiwan	4	16	3	8	-35	14
Israel	4	11	3	6	10	13
Portugal	4	-2	2	-3	1	-5
Norway	4	-5	2	-4	-49	-51
Czech Republic	3	-6	2	-7	35	1
South Africa	3	0	2	-2	-3	-24
United Arab Emirates	3	2	1	4	-25	-33
Russia	3	8	1	7	-74	-76
Finland	2	-10	1	-6	-49	-50
Hungary	2	2	1	0	-8	-4
Greece	2	-3	1	-5	-27	-16
Egypt	2	-6	1	-6	-67	-44
Saudi Arabia	2	0	1	0	-19	-40
Morocco	1	-6	0	-4	18	1
Indonesia	1	-6	1	-3	19	-11
Vietnam	1	4	1	3	-26	73
Hong Kong	1	-2	1	0	-54	-36
Thailand	1	0	1	2	-47	-61
Croatia	1	-1	1	0	87	32
Bulgaria	1	8	0	3	-1	11
Malaysia	1	3	0	2	1	-9

# LOUISIANA



## Visitor Spending 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending (\$M)	TOTAL	\$905	\$161	\$130	\$568	\$825	\$906	\$848
	OVERSEAS	\$703	\$117	\$107	\$444	\$616	\$702	\$682
	Canada	\$185	\$39	\$16	\$115	\$201	\$194	\$156
	UK + Ireland	\$129	\$16	\$6	\$96	\$108	\$114	\$108
	DACH Region	\$91	\$11	\$9	\$68	\$90	\$94	\$88
	Australia	\$63	\$9	\$1	\$40	\$62	\$77	\$77
	France	\$31	\$4	\$3	\$23	\$32	\$34	\$31
	Brazil	\$30	\$5	\$3	\$16	\$25	\$27	\$28
	China	\$23	\$6	\$3	\$4	\$15	\$30	\$28
	India	\$15	\$3	\$5	\$13	\$17	\$23	\$24
	Nordics	\$32	\$5	\$2	\$22	\$22	\$22	\$21
	Japan	\$28	\$5	\$1	\$6	\$13	\$14	\$15
	Benelux	\$15	\$2	\$1	\$10	\$14	\$16	\$15
	Italy	\$15	\$2	\$2	\$7	\$13	\$14	\$13
	South Korea	\$13	\$3	\$3	\$6	\$10	\$12	\$12
	Spain	\$13	\$2	\$2	\$8	\$12	\$13	\$12
	Mexico	\$16	\$5	\$7	\$9	\$9	\$10	\$10

# LOUISIANA



## Visits 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F) ₯
Visits (000s)	TOTAL	691	154	106	413	576	614	554
	OVERSEAS	477	95	74	284	366	402	383
	Canada	188	50	18	108	186	184	145
	UK + Ireland	90	15	6	63	69	74	69
	DACH Region	69	10	9	45	56	58	54
	Australia	38	7	1	17	27	29	29
	Mexico	26	9	14	21	24	28	25
	France	30	5	3	18	24	25	23
	India	8	3	3	7	10	14	14
	Brazil	14	3	1	7	11	13	13
	Nordics	20	4	2	12	12	12	12
	China	17	2	1	3	9	12	12
	Benelux	15	4	2	9	11	12	11
	Italy	14	2	2	6	9	11	10
	Japan	18	4	1	3	8	9	10
	Spain	13	2	2	7	9	10	9
	South Korea	9	1	1	3	5	6	6

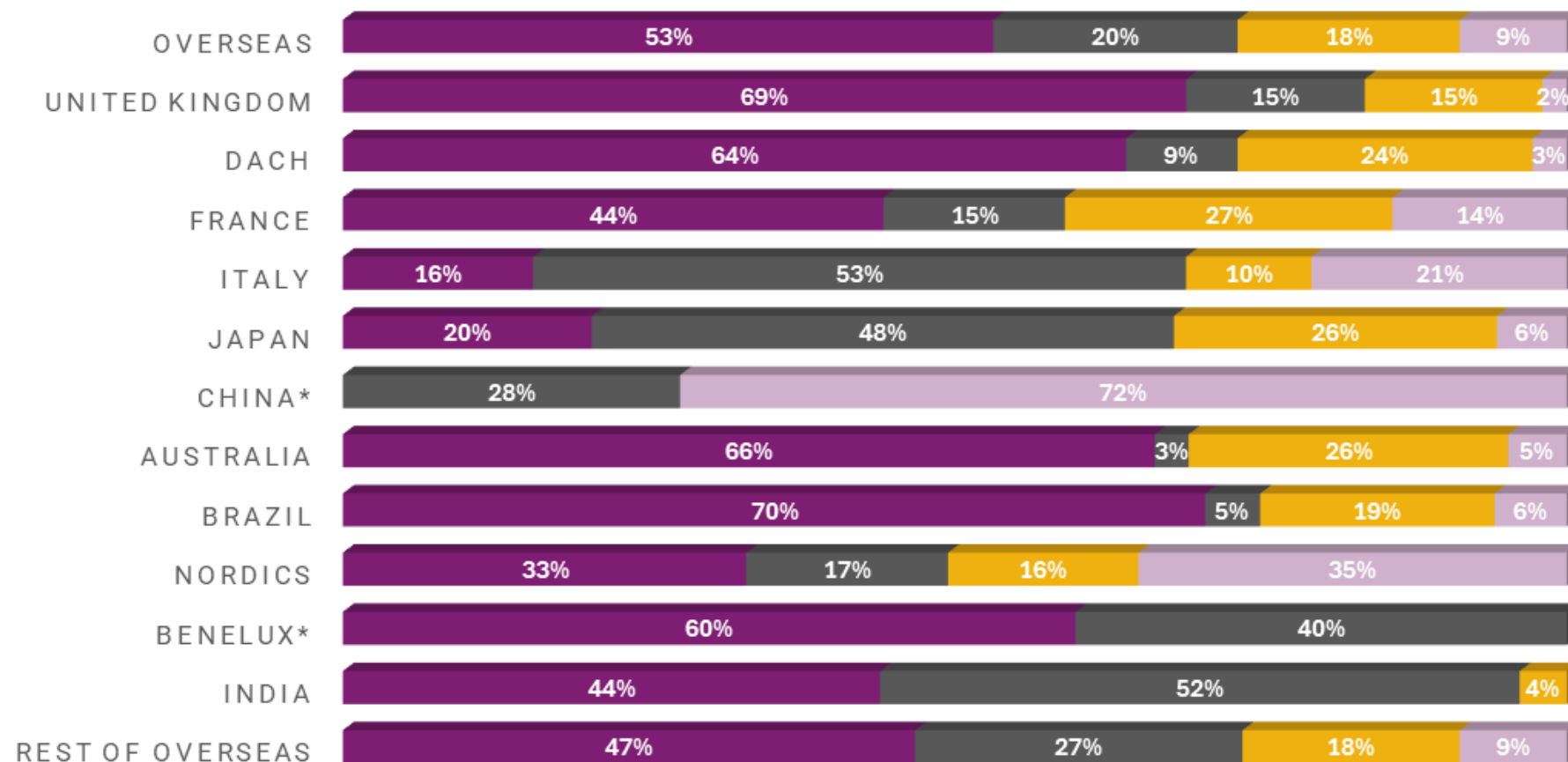


# LOUISIANA



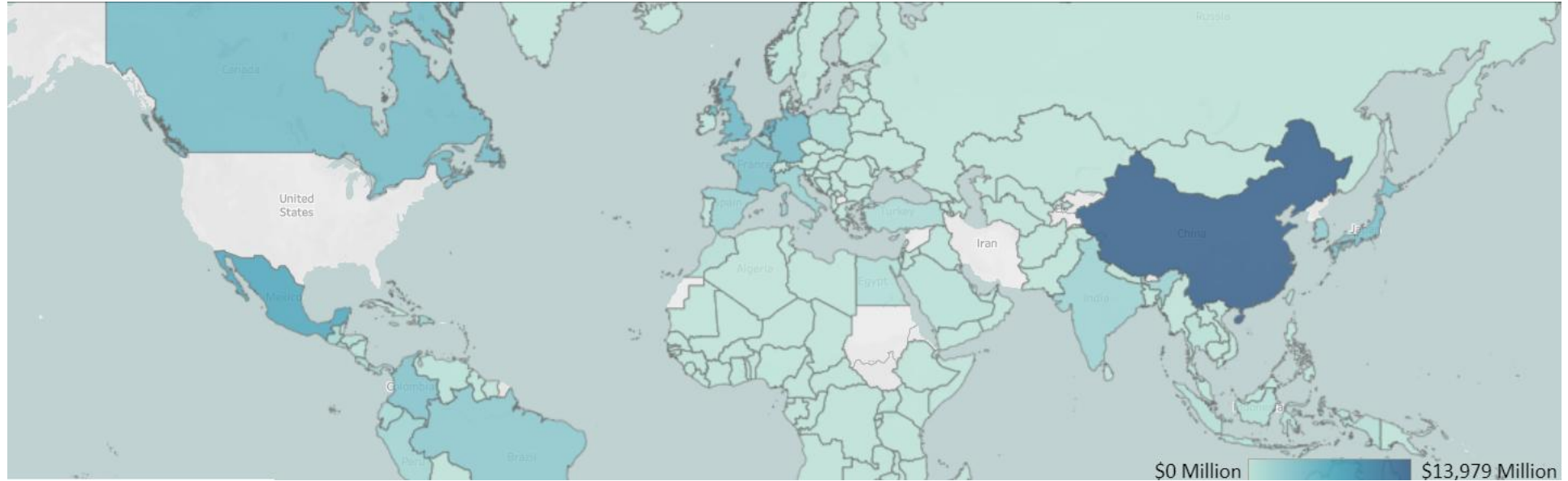
LOUISIANA: Purpose of Trip

Leisure Business VFR Other



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

# Exports (Goods)



**EXPORTS IN GOODS**  
*2024*

**\$87 Billion**

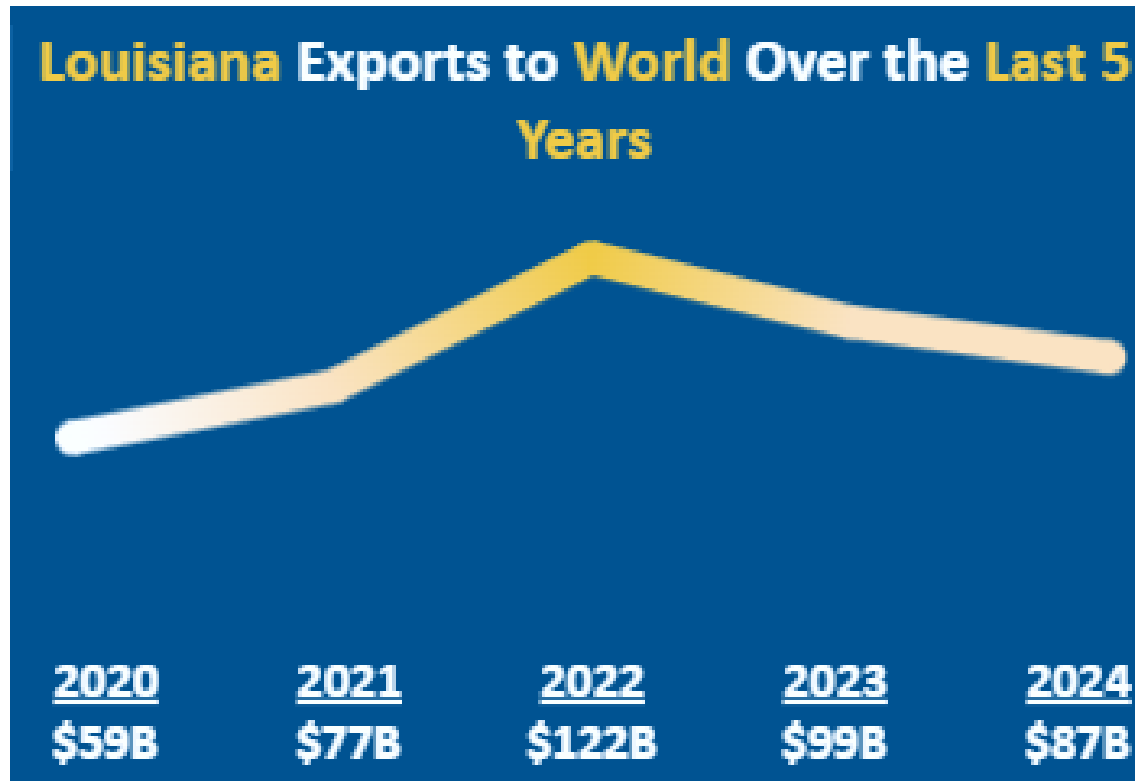
**TOP COUNTRIES**

CHINA  
MEXICO  
NETHERLANDS  
UK  
CANADA  
COLOMBIA

## Goods Exports by Country

(in millions)

Partner	2024
World	\$86,951
China	\$10,177
Mexico	\$7,250
Netherlands	\$5,579
United Kingdom	\$4,671
Canada	\$4,164
Colombia	\$4,019
Germany	\$3,809
Japan	\$3,245
Brazil	\$2,803
Belgium	\$2,538
France	\$2,309
India	\$2,287
Dominican Republic	\$2,212
South Korea	\$1,909
Italy	\$1,816



EXPORTERS

2,699

Louisiana companies exported goods in  
2021

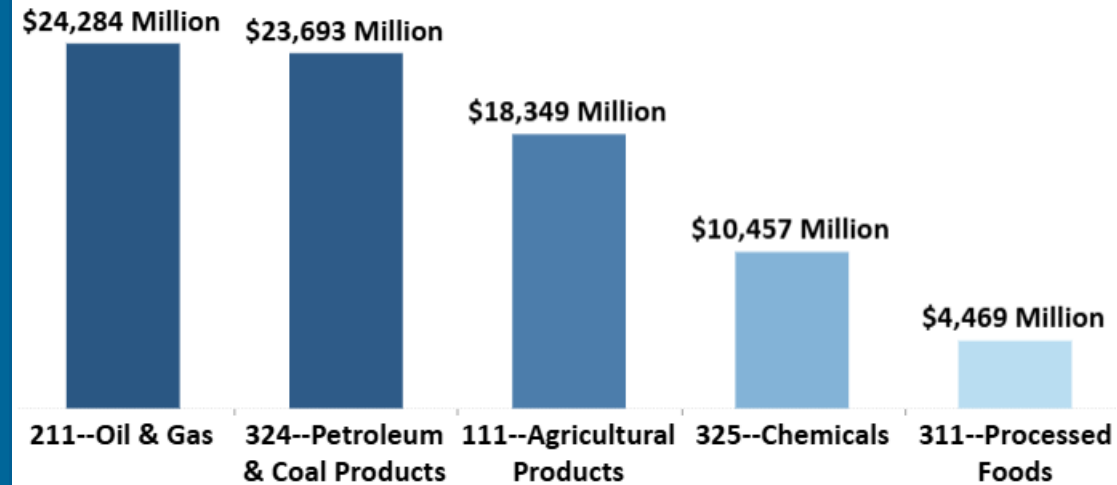
86%

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

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

TOP TRADE SECTORS

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



# International Students



# LOUISIANA

INTERNATIONAL  
STUDENTS  
*2022/23*

6,891

STUDENT-VISIT  
RATIO

1.0%

INDEXED  
STUDENT-VISIT  
RATIO  
U.S. = 100

100

# LOUISIANA

## INTERNATIONAL STUDENTS, 2023/24



**6,891**

International Students



**32**

Rank in the United States\*



**4.0**

% Change from  
Previous Year



**\$264,779,660**

Estimated International  
Student Expenditure\*\*

## LEADING PLACES OF ORIGIN

Place of Origin	% Total
China	<b>13.1</b>
Nepal	<b>10.3</b>
Nigeria	<b>9.2</b>
India	<b>8.4</b>
Bangladesh	<b>5.3</b>

## LEADING INSTITUTIONS

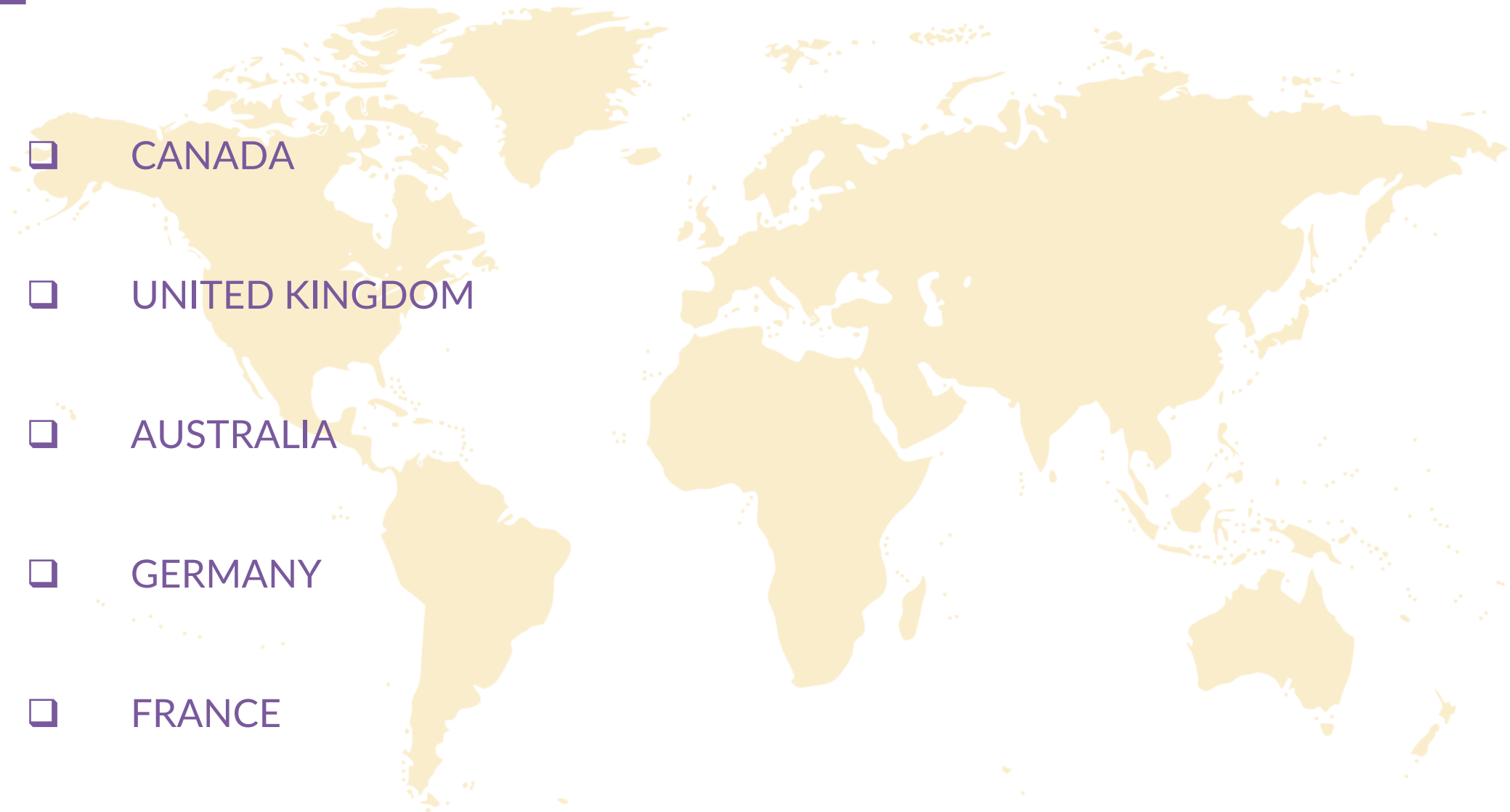
Institution	Total
Louisiana State University and A&M College	<b>1,873</b>
Tulane University	<b>1,426</b>
University of Louisiana - Lafayette	<b>657</b>
Louisiana Tech University	<b>555</b>
McNeese State University	<b>423</b>

# Visitor Perception

# MARKET PROFILES

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TRAVEL·SOUTH  USA



# CANADA



POPULATION <i>2024</i>	REAL GDP GROWTH <i>2025 PROJECTION</i>	CURRENCY RATE CANADIAN DOLLAR 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>
40M	2.4%	1.37	1.9%	5.5%	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)

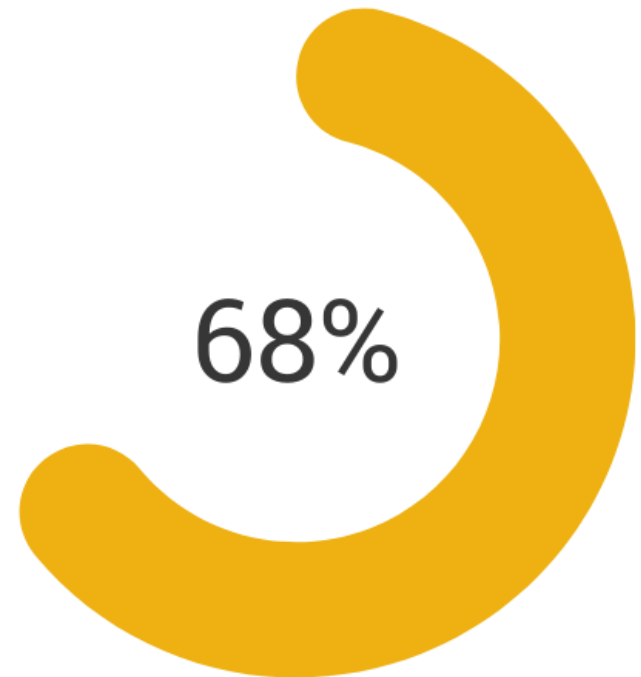
# CANADA

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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

---

26%

## 1 Trip

---

17%

## 2 Trips

---

5%

## 3+ Trips

---

5%

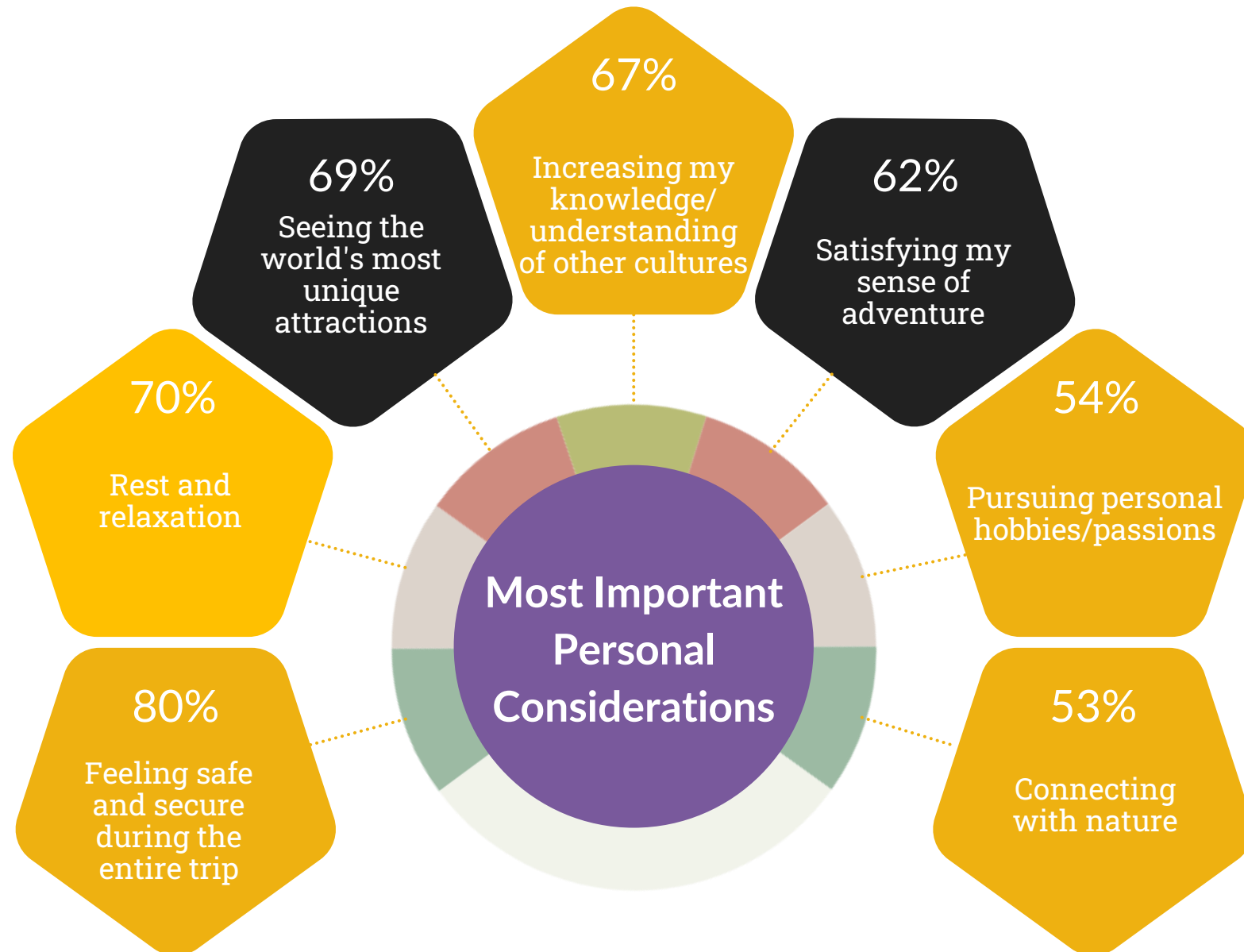
# 0.5

**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

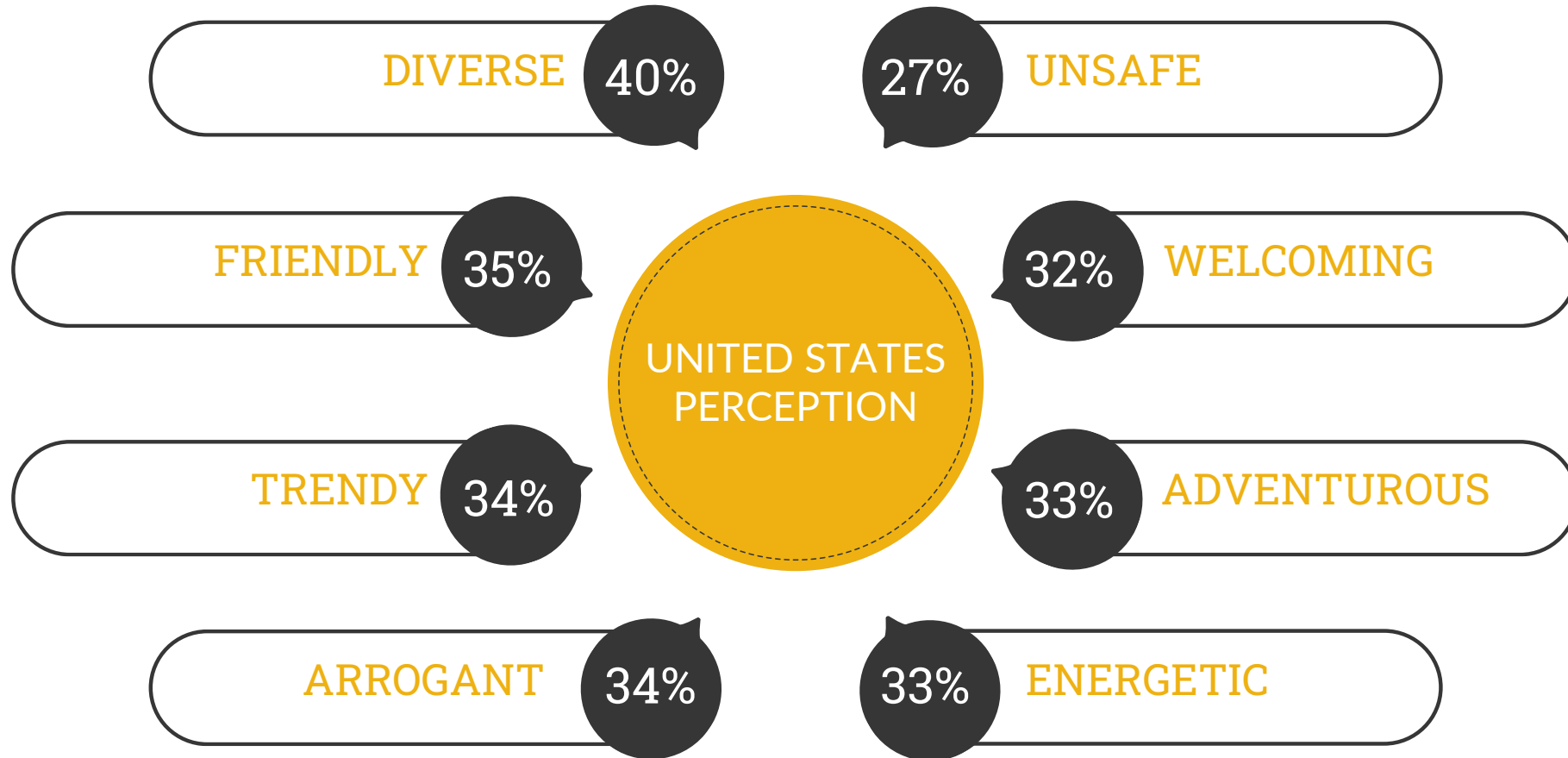
- 61 %** Uncleanliness in the destination
- 56%** High prices
- 56%** Personal safety concerns
- 44%** Lack of information for planning trip & at destination
- 41 %** Crowdedness
- 40%** Inconvenience of travel to the destination
- 35%** Political climate not aligning with personal views
- 27%** Visa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

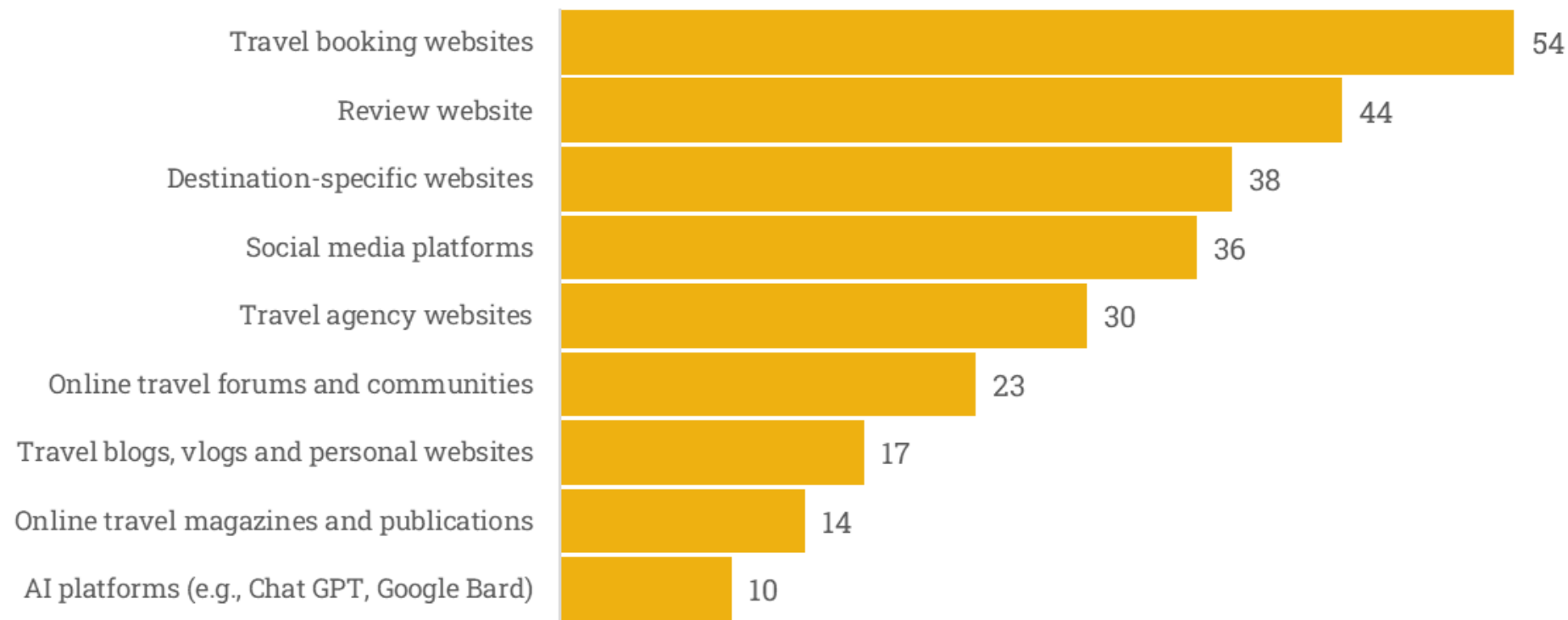
## Sources of Information for Destination Selection (%)



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
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- 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

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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

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**1+ Trip**

---

30%

**1 Trip**

---

15%

**2 Trips**

---

10%

**3+ Trips**

---

5%

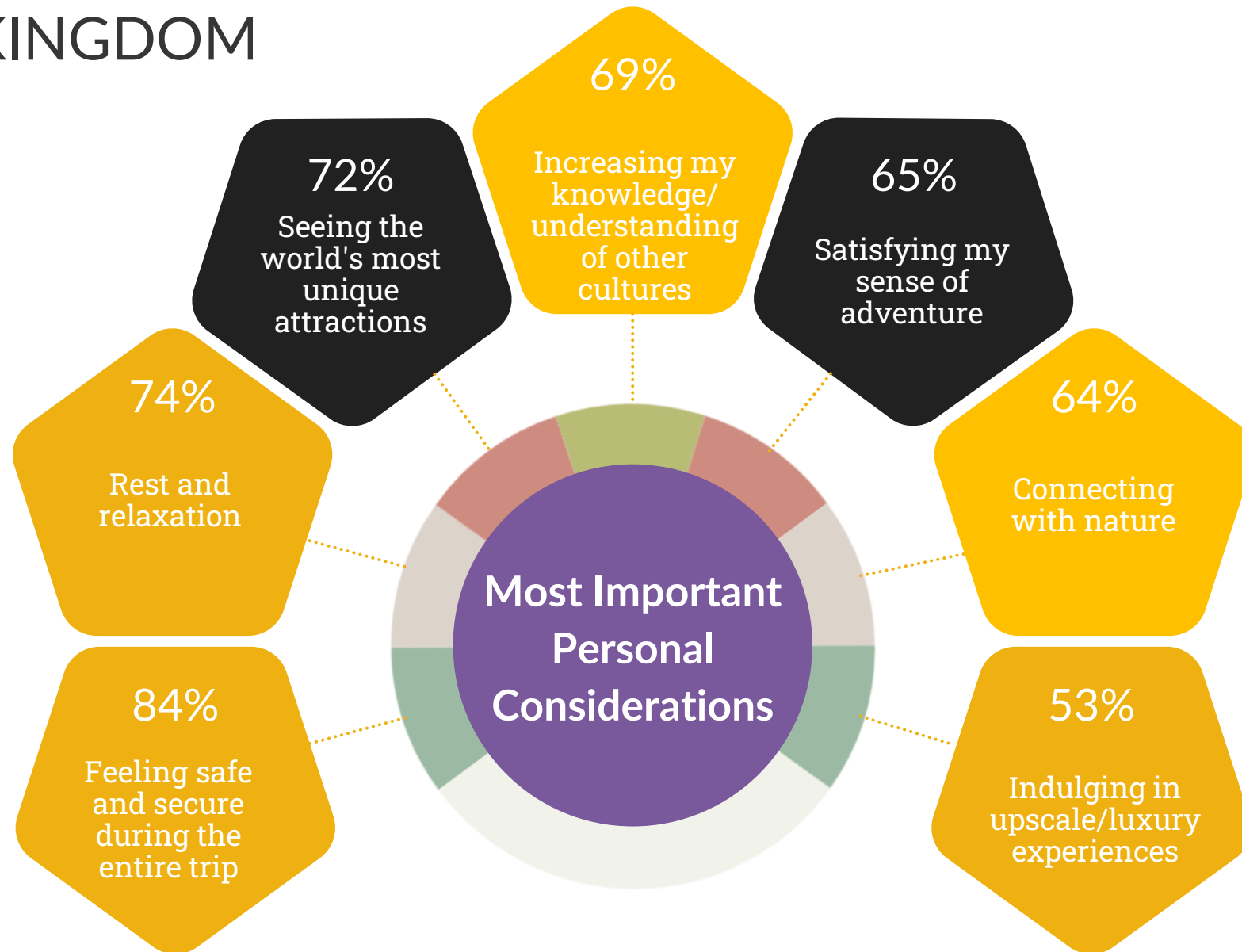
0.7

**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

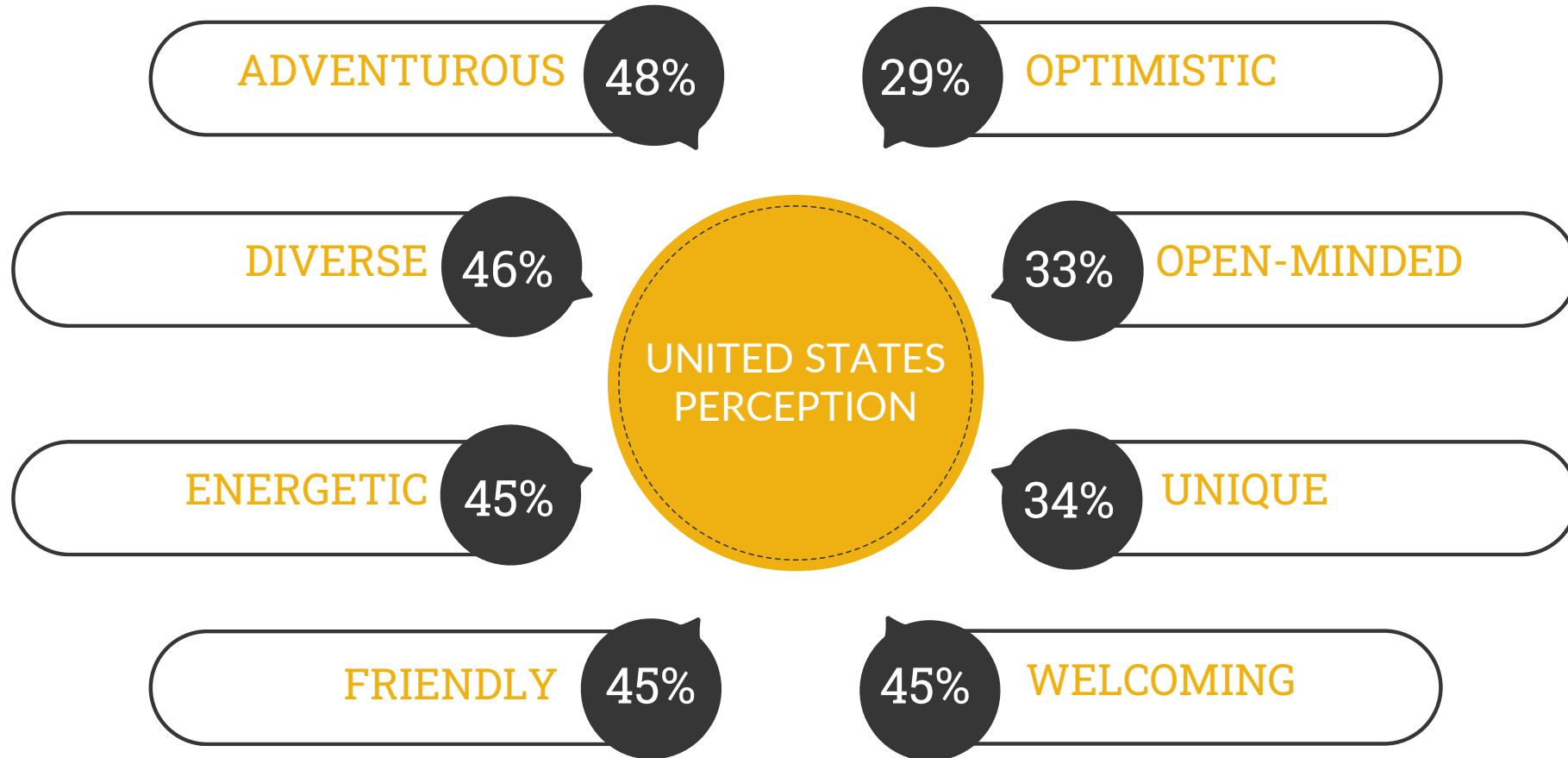
## Most Discouraging From Visiting a Destination

- 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)

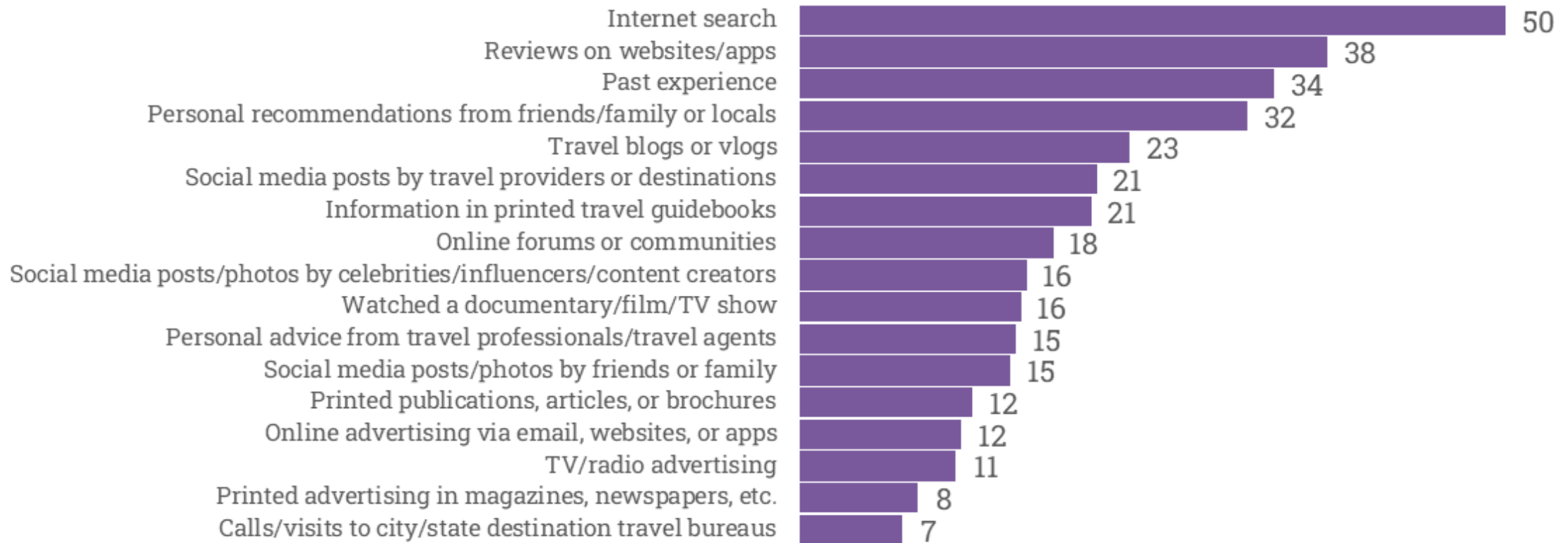
# UNITED KINGDOM



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)

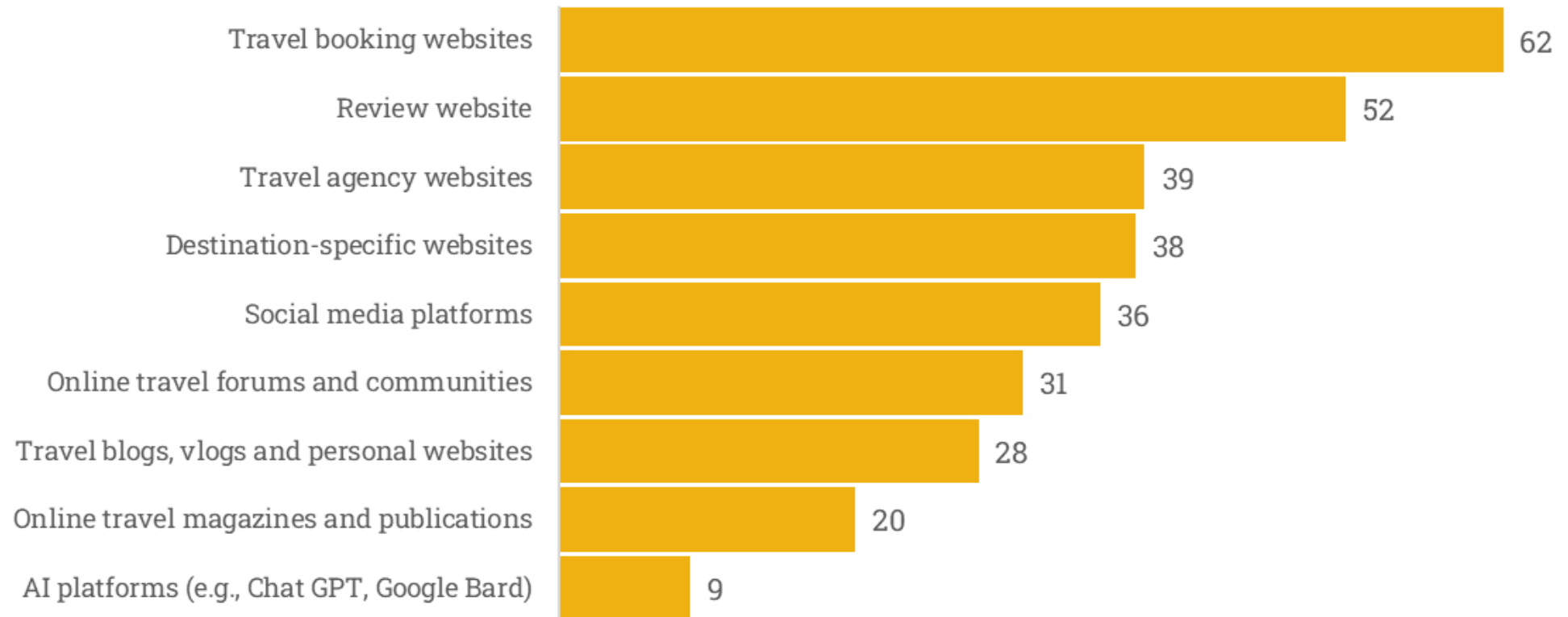
## Sources of Information for Destination Selection (%)



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)

# AUSTRALIA



POPULATION  
*2024*

27M

REAL GDP  
GROWTH  
*2025 PROJECTION*

2.1%

CURRENCY  
RATE  
AUSTRALIAN  
DOLLAR  
2024

1.52

INFLATION  
RATE  
*2025 PROJECTION*

3.3%

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

11.3%

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

26.8%

# AUSTRALIA

---

45%

Likelihood to Visit Travel South  
in the next Five Years

Note: Australian visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:



- 37% Safety
- 30% Historical attractions
- 28% Important or iconic attractions
- 27% Hotels and lodging
- 27% Restaurants and food
- 26% National Parks
- 24% Availability of direct flight service
- 23% Sightseeing tours
- 22% Transportation and how to get around
- 22% Ways to experience nature
- 20% Museums and culture
- 18% Opportunities for relaxation
- 18% Entertainment, events, shows
- 17% Shopping
- 17% Beaches
- 16% Things to do outside the large cities
- 14% Theme parks
- 14% Family fun
- 13% Touristy attractions to avoid
- 12% Ways to experience the American lifestyle
- 12% Level of crowds
- 11% Sample trip itineraries
- 10% Off-the-beaten path attractions
- 9% Outdoor activities (biking, boating, hiking, etc.)
- 9% Recommendations from residents
- 9% Professional sporting events
- 7% Ideas for adventurous travel
- 5% Commitment to being an eco-friendly/sustainable place
- 4% Snow/winter activities (skiing, sledding, etc.)

Source: Future Partners (2025)

# AUSTRALIA

---

Recall of “Buzz”: Travel South  
Destinations

22%

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



Note: Australian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

# AUSTRALIA

---



## 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

# AUSTRALIA

---



1 Trip

---

38%

2 Trips

---

34%

3-4 Trips

---

20%

5+ Trips

---

8%

2.3

Average Number of Leisure  
International Trips

Note: Australian 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)

# AUSTRALIA

---



## 1+ Trips

---

31%

## 1 Trip

---

23%

## 2 Trips

---

5%

## 3+ Trips

---

3%

0.5

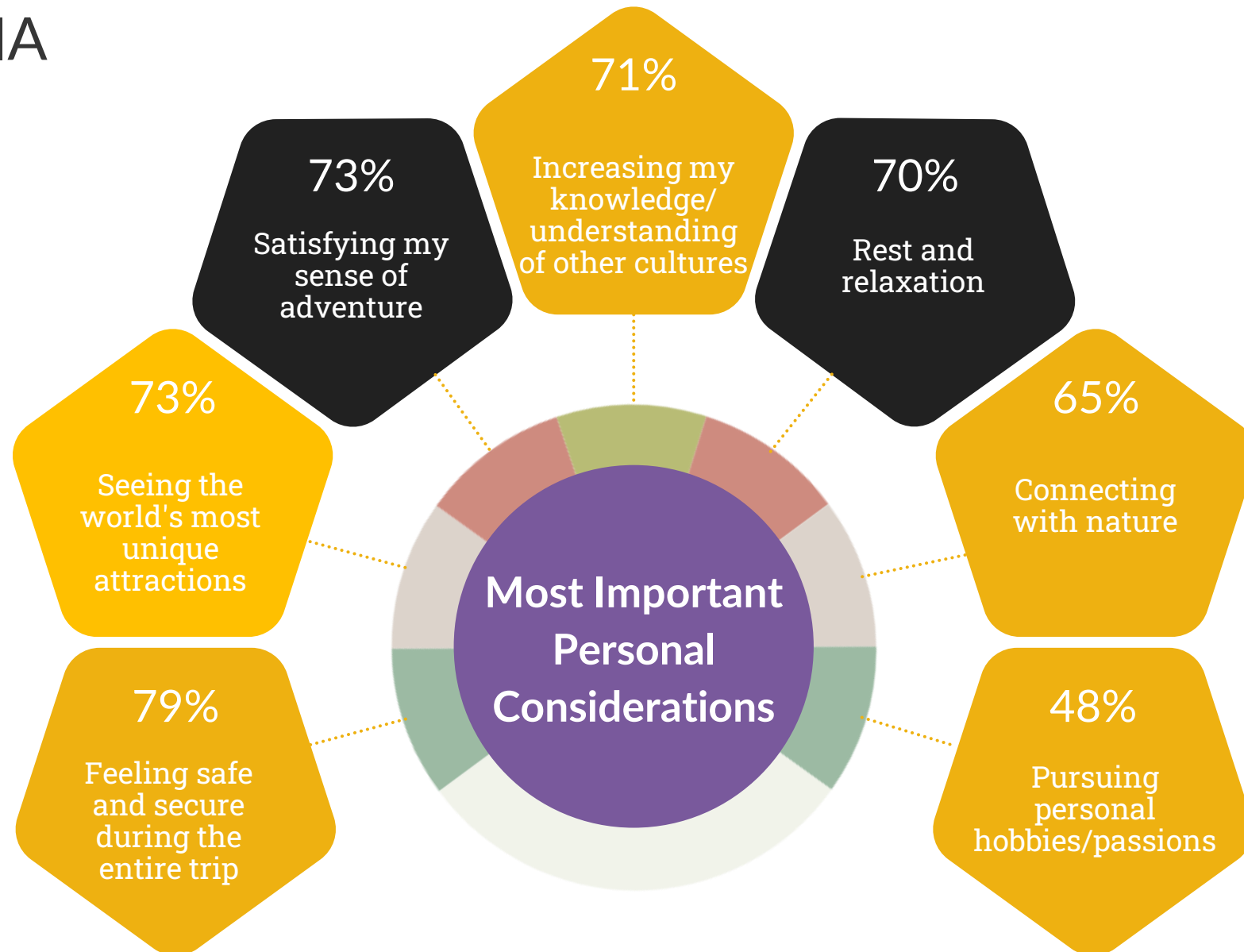
Average Number of Bleisure Trips  
% of Business Trips with a Leisure Extension

Note: Australian 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)



# AUSTRALIA



Note: Australian 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)

# AUSTRALIA

## Most Important When Choosing a Destination

- 78%** Accommodation options
- 75%** Landmarks and sightseeing options
- 72%** Appeal of local culture
- 72%** Natural features/landscapes
- 69%** Climate or weather at the destination
- 63%** Leisure attractions
- 63%** Ease of travel to the destination
- 57%** Ease of communication with locals at the destination

## Most Discouraging From Visiting a Destination

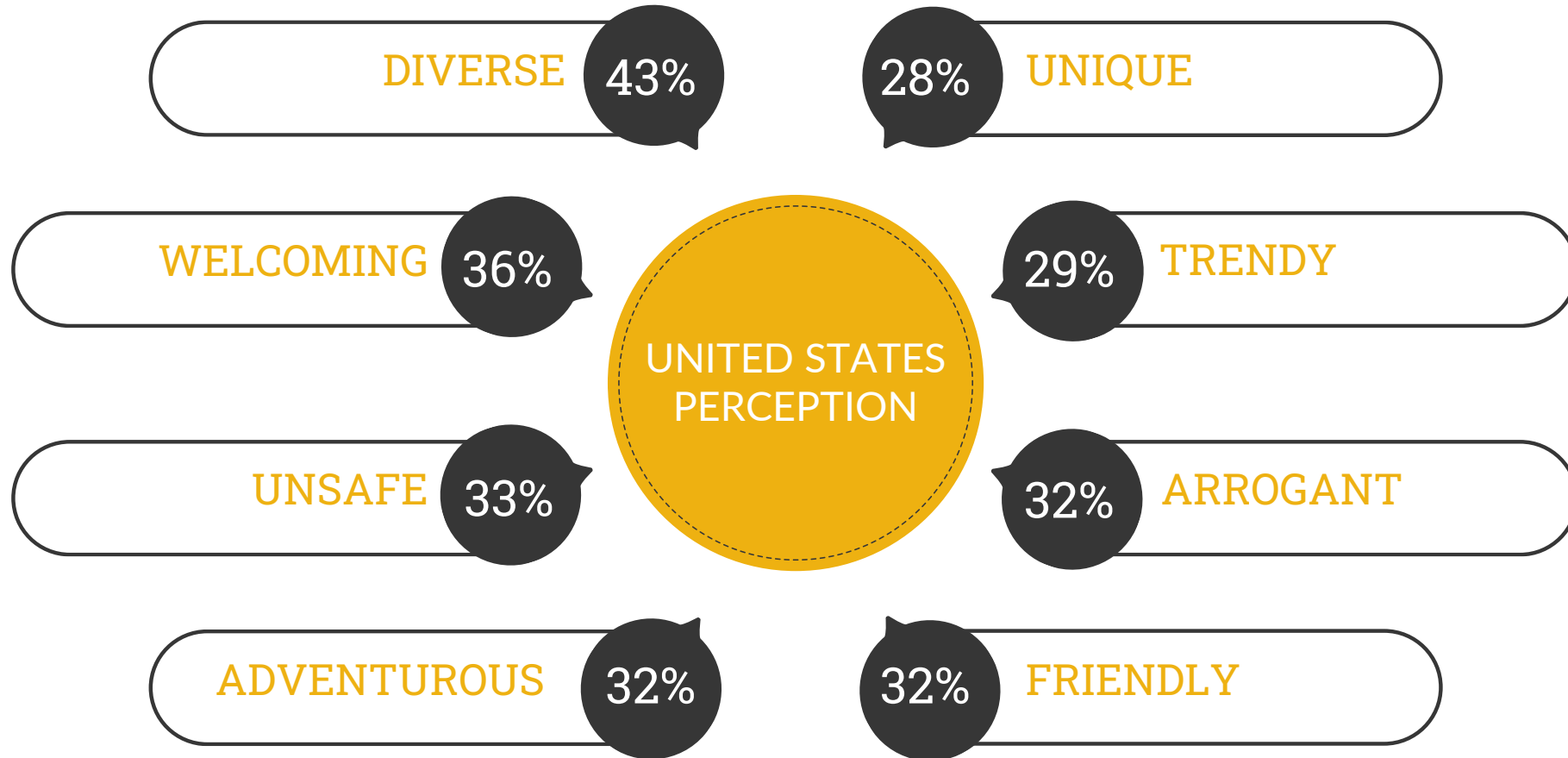
- 56%** Personal safety concerns
- 49%** High prices
- 44%** Uncleanliness in the destination
- 36%** Crowdedness
- 35%** Lack of information for planning trip & at destination
- 31%** Political climate not aligning with personal views
- 28%** Inconvenience of travel to the destination
- 25%** Lack of environmental responsibilities

Note: Australian 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)

# AUSTRALIA

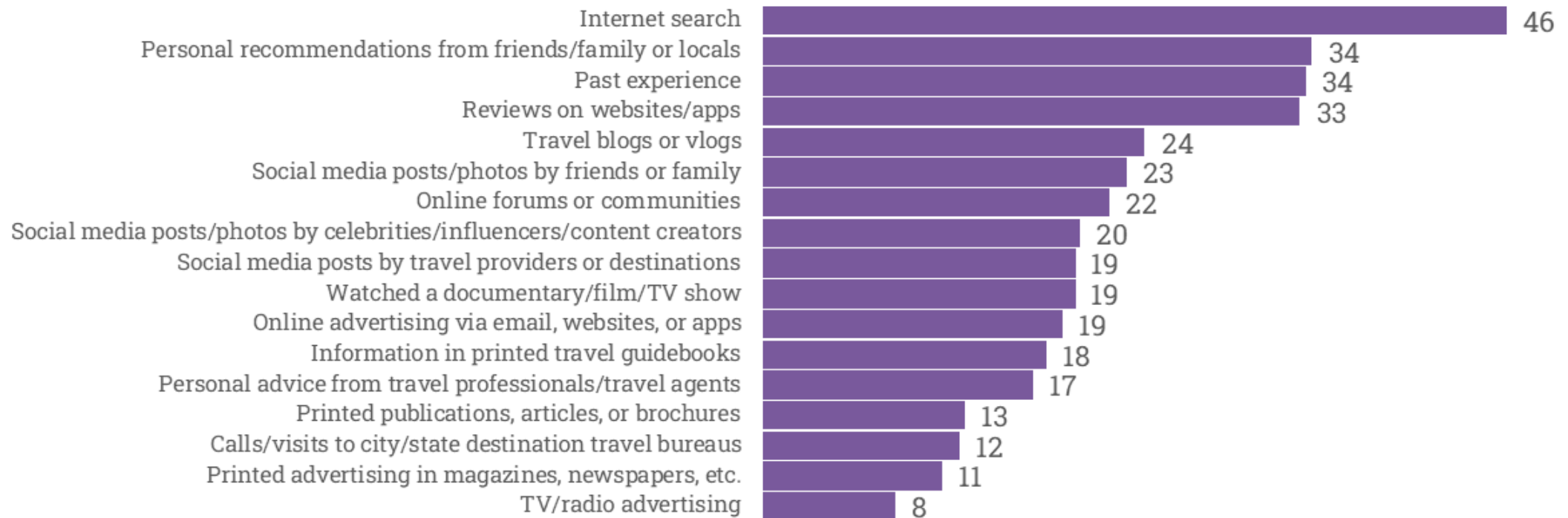
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Note: Australian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

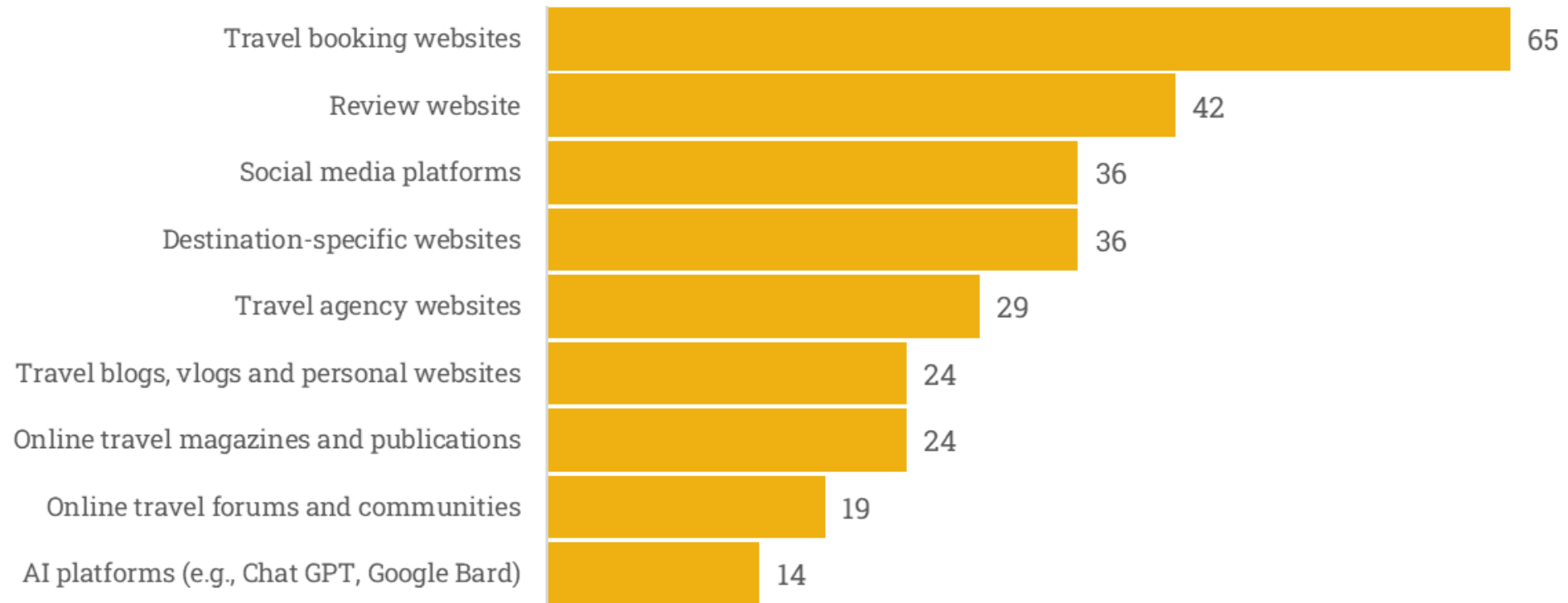
## Sources of Information for Destination Selection (%)



Note: Australian 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: Australian 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	72%
Facebook/META	70%
Instagram	57%
Tik Tok	39%
LinkedIn	35%
Snapchat	27%
Twitter/X	25%
Pinterest	23%
Reddit	19%
Tumblr	7%

Note: Australian 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)

# AUSTRALIA

---

## Likelihood of how 2025 will evolve:

*Percentages show the total of "Strongly Agree" + "Agree"*

54%

Global wars/strife will impact the destinations visited in 2025

53%

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

39%

Luxury travel experiences are an important part of leisure trips

37%

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

36%

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

# 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)

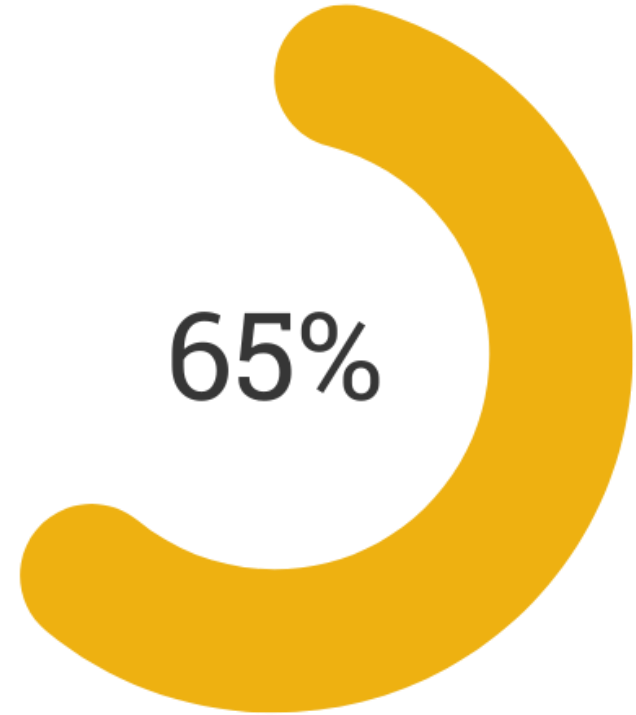
# GERMANY

---



## 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**

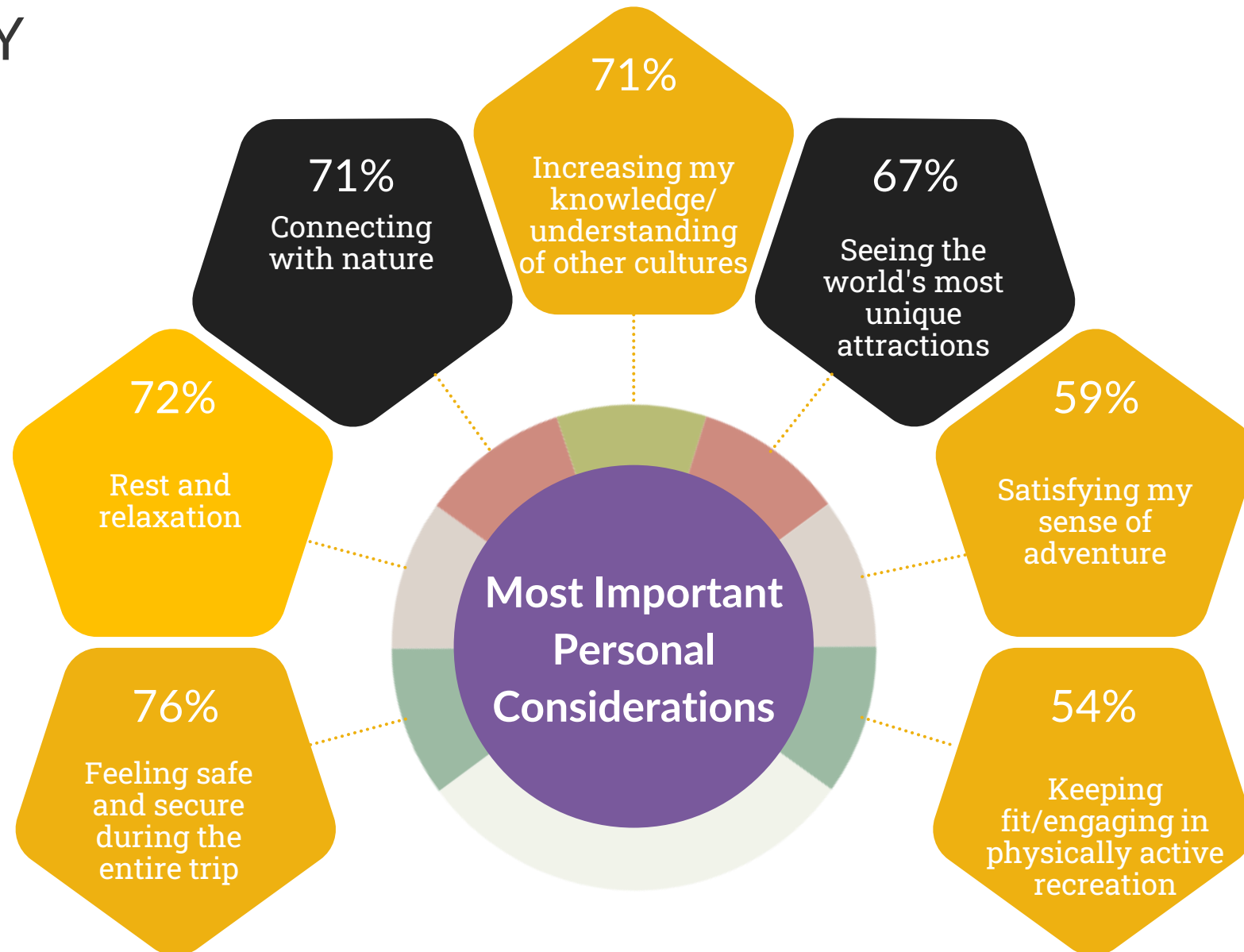
---

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

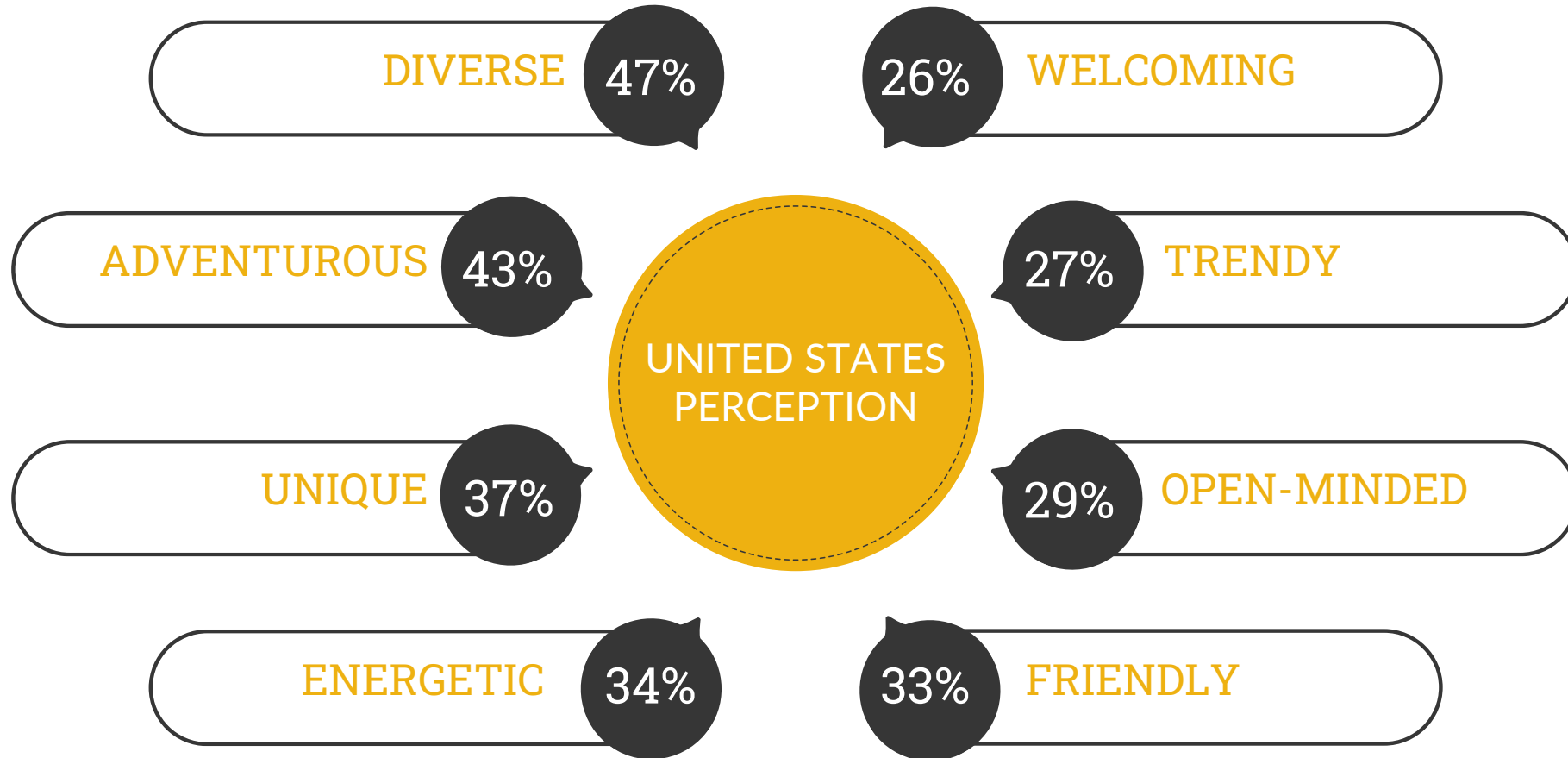
- 48%** Personal safety concerns
- 46%** Uncleanliness in the destination
- 42%** Crowdedness
- 38%** High prices
- 38%** Political climate not aligning with personal views
- 31%** Lack of environmental responsibilities
- 30%** Lack of information for planning trip & at destination
- 25%** Inconvenience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



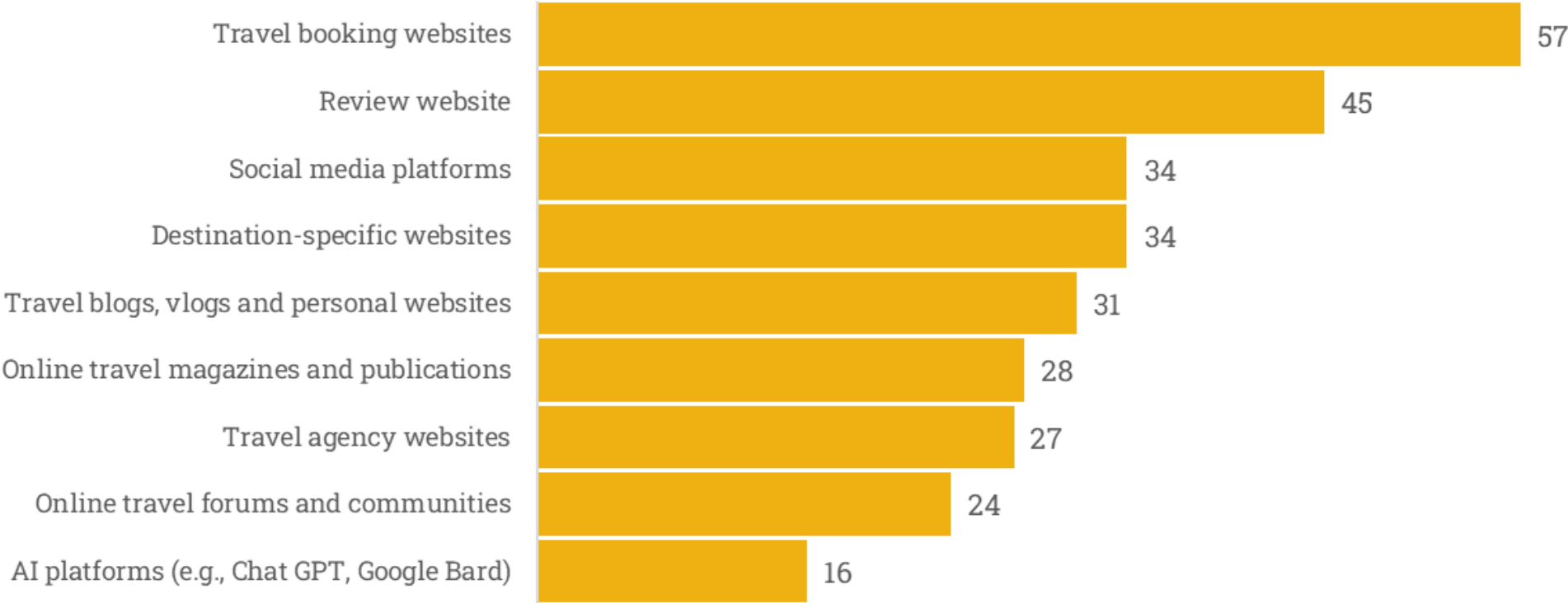
## Sources of Information for Destination Selection (%)



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

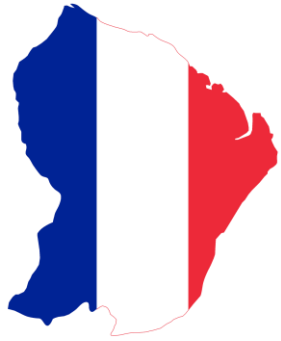
29%

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

# FRANCE



POPULATION  
*2024*

67M

REAL GDP  
GROWTH  
*2025 PROJECTION*

1.1%

CURRENCY  
RATE  
EURO  
2024

0.92

INFLATION  
RATE  
*2025 PROJECTION*

1.6%

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

8.8%

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

24.8%

# FRANCE

---

58%

Likelihood to Visit Travel South  
in the next Five Years

Note: French visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:



- 37% Sightseeing tours
- 31% Historical attractions
- 31% National Parks
- 26% Availability of direct flight service
- 26% Hotels and lodging
- 25% Ways to experience the American lifestyle
- 23% Restaurants and food
- 21% Museums and culture
- 21% Ways to experience nature
- 20% Shopping
- 20% Safety
- 19% Important or iconic attractions
- 18% Opportunities for relaxation
- 17% Beaches
- 17% Off-the-beaten path attractions
- 14% Entertainment, events, shows
- 14% Ideas for adventurous travel
- 13% Transportation and how to get around
- 13% Things to do outside the large cities
- 13% Family fun
- 13% Theme parks
- 12% Touristy attractions to avoid
- 11% Outdoor activities (biking, boating, hiking, etc.)
- 11% Recommendations from residents
- 10% Sample trip itineraries
- 9% Commitment to being an eco-friendly/sustainable place
- 7% Professional sporting events
- 6% Level of crowds
- 4% Snow/winter activities (skiing, sledding, etc.)

Source: Future Partners (2025)

# FRANCE

---

Recall of “Buzz”: Travel South  
Destinations

32%

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

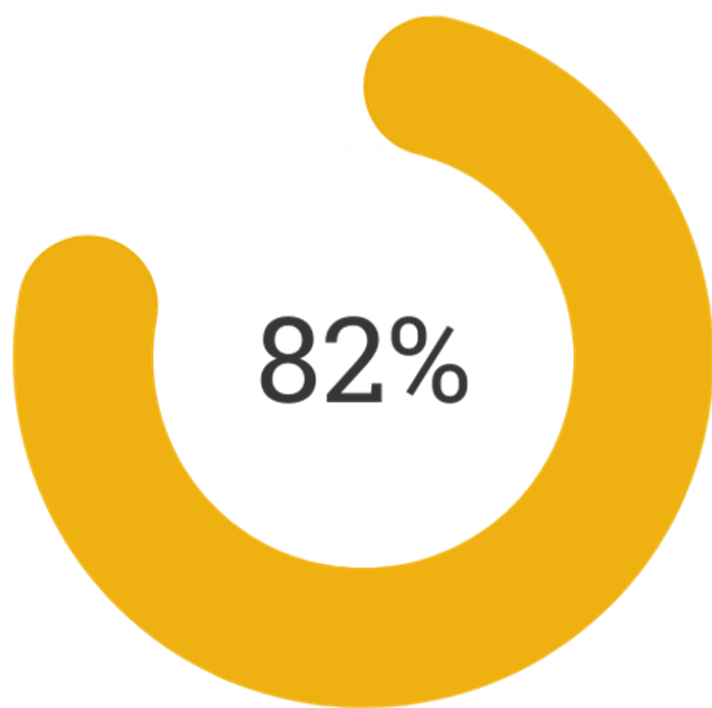


Note: French visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

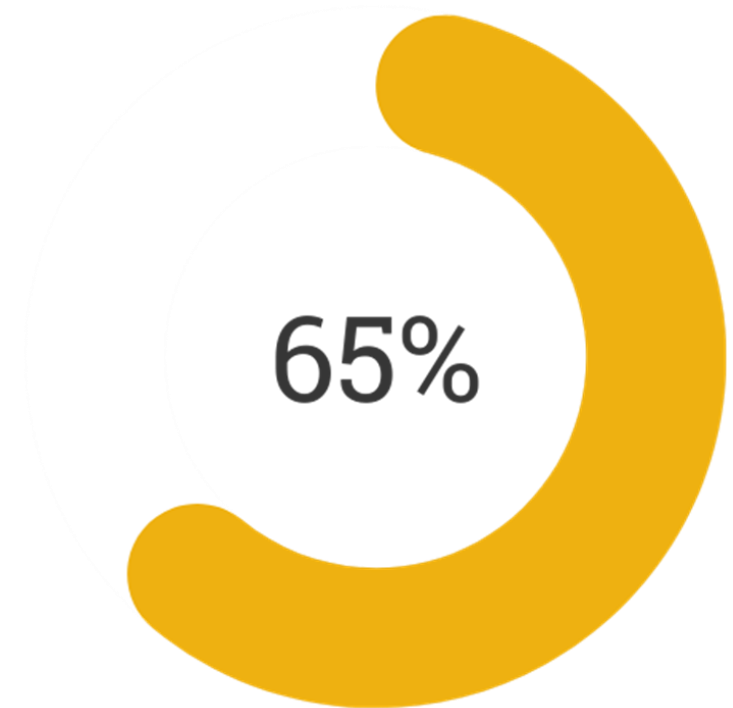
# FRANCE

---



## 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



# FRANCE

---



1 Trip

---

28%

2 Trips

---

27%

3-4 Trips

---

27%

5+ Trips

---

18%

# 3.2

## Average Number of Leisure International Trips

Note: French 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)

# FRANCE

---



1.1

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

1+ Trips

---

36%

1 Trip

---

18%

2 Trips

---

6%

3+ Trips

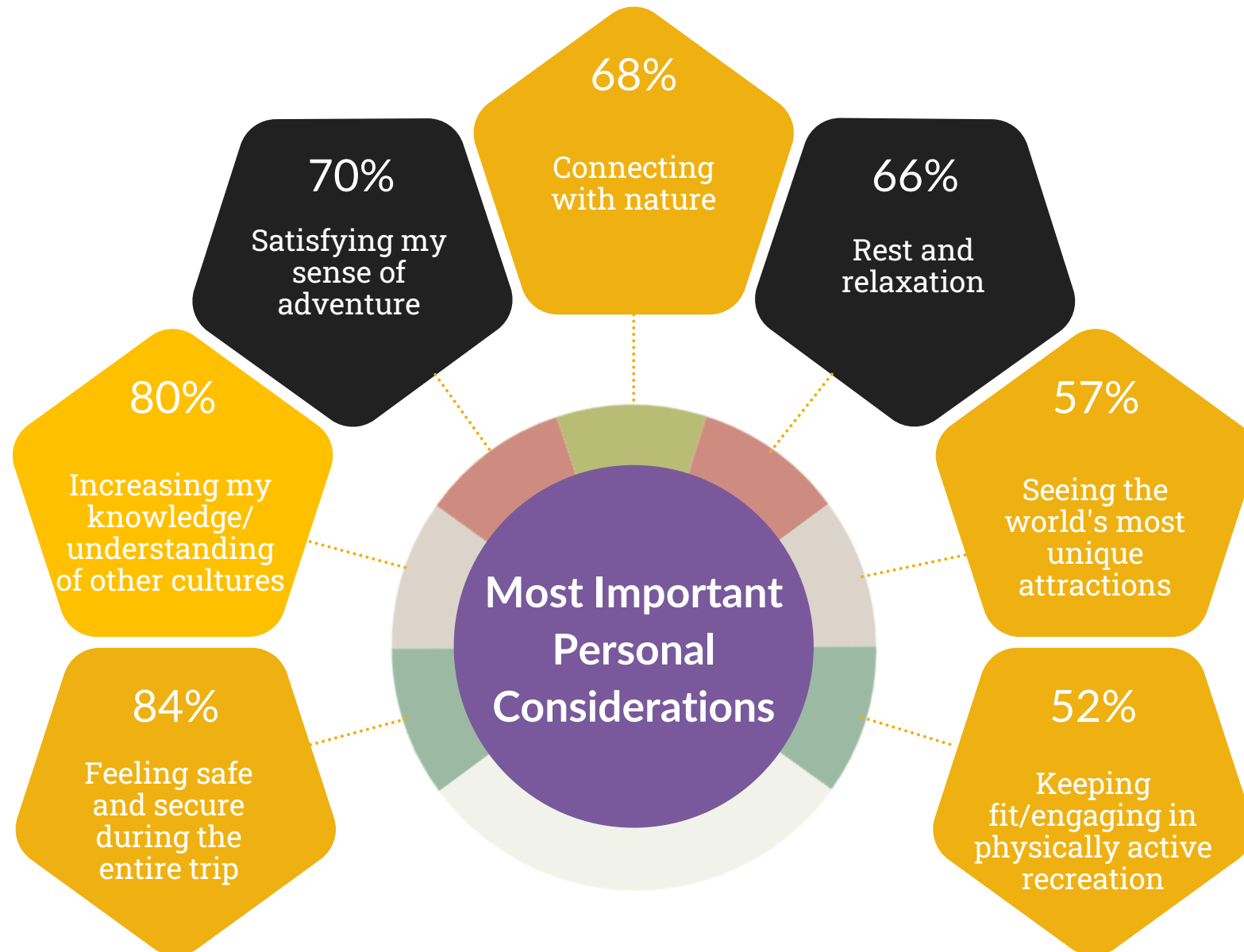
---

11%

Note: French 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)

# FRANCE



Note: French 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)

# FRANCE

## Most Important When Choosing a Destination

- 84%** Natural features/landscapes
- 81 %** Appeal of local culture
- 81 %** Landmarks and sightseeing options
- 75%** Climate or weather at the destination
- 73%** Accommodation options
- 71 %** Ease of travel to the destination
- 63%** Leisure attractions
- 60%** Ease of communication with locals at the destination

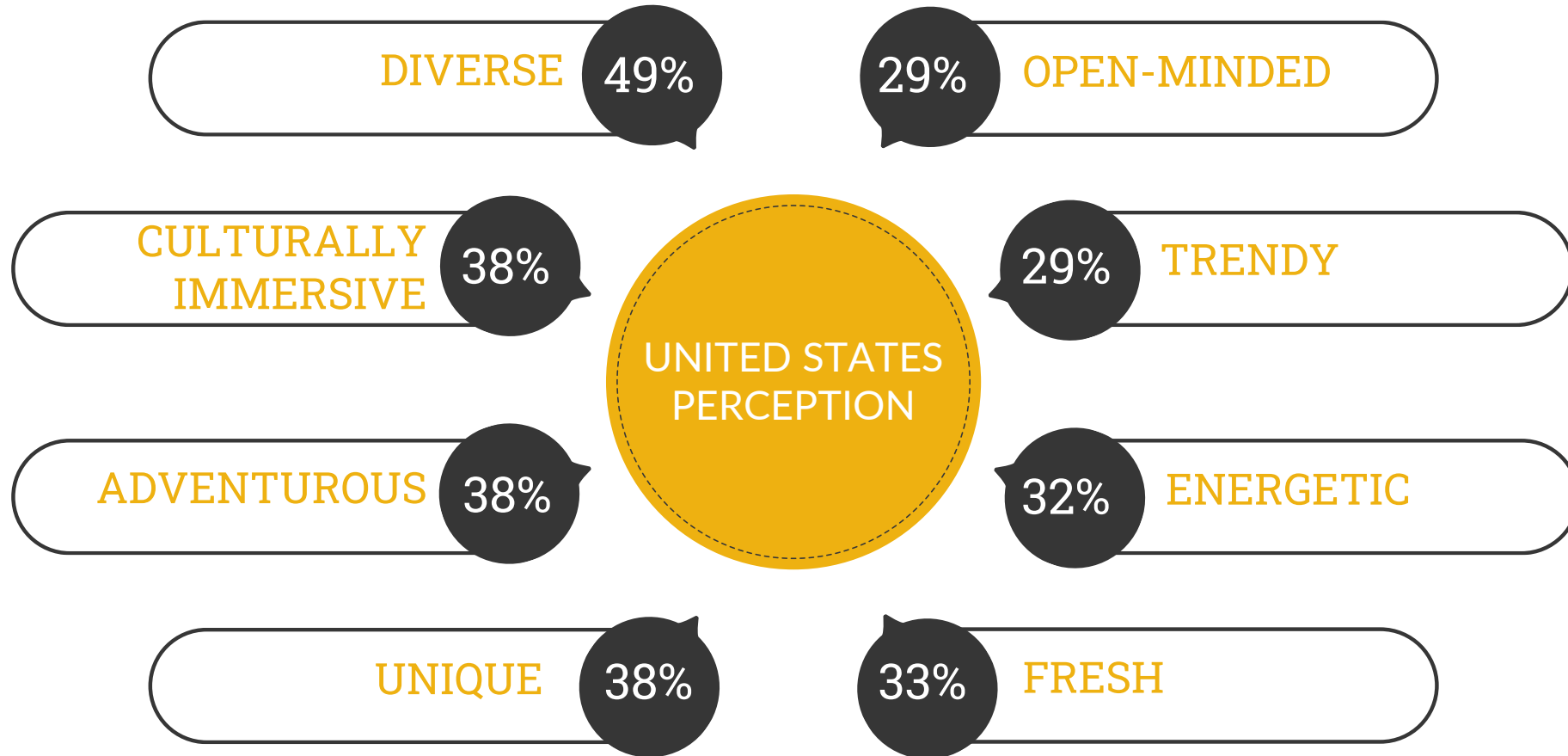
## Most Discouraging From Visiting a Destination

- 54%** Uncleanliness in the destination
- 54%** High prices
- 52%** Personal safety concerns
- 47%** Crowdedness
- 38%** Lack of information for planning trip & at destination
- 36%** Lack of environmental responsibilities
- 31 %** Political climate not aligning with personal views
- 25%** Visa requirements/entry procedures

Note: French 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)

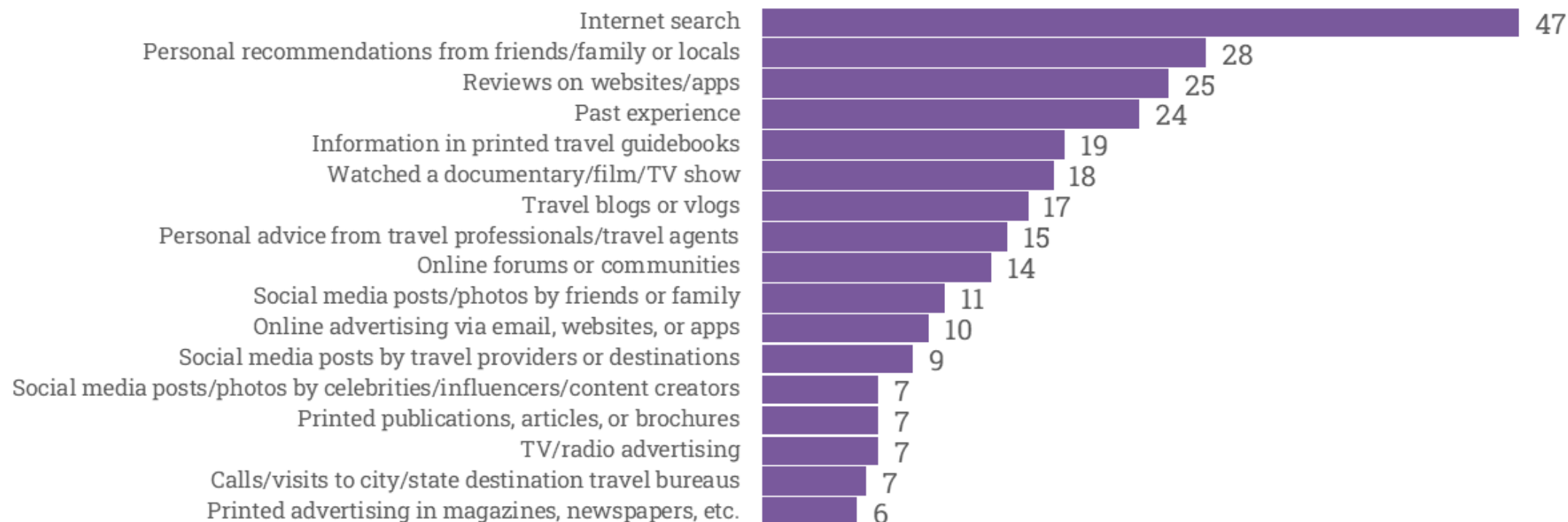
# FRANCE



Note: French 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)

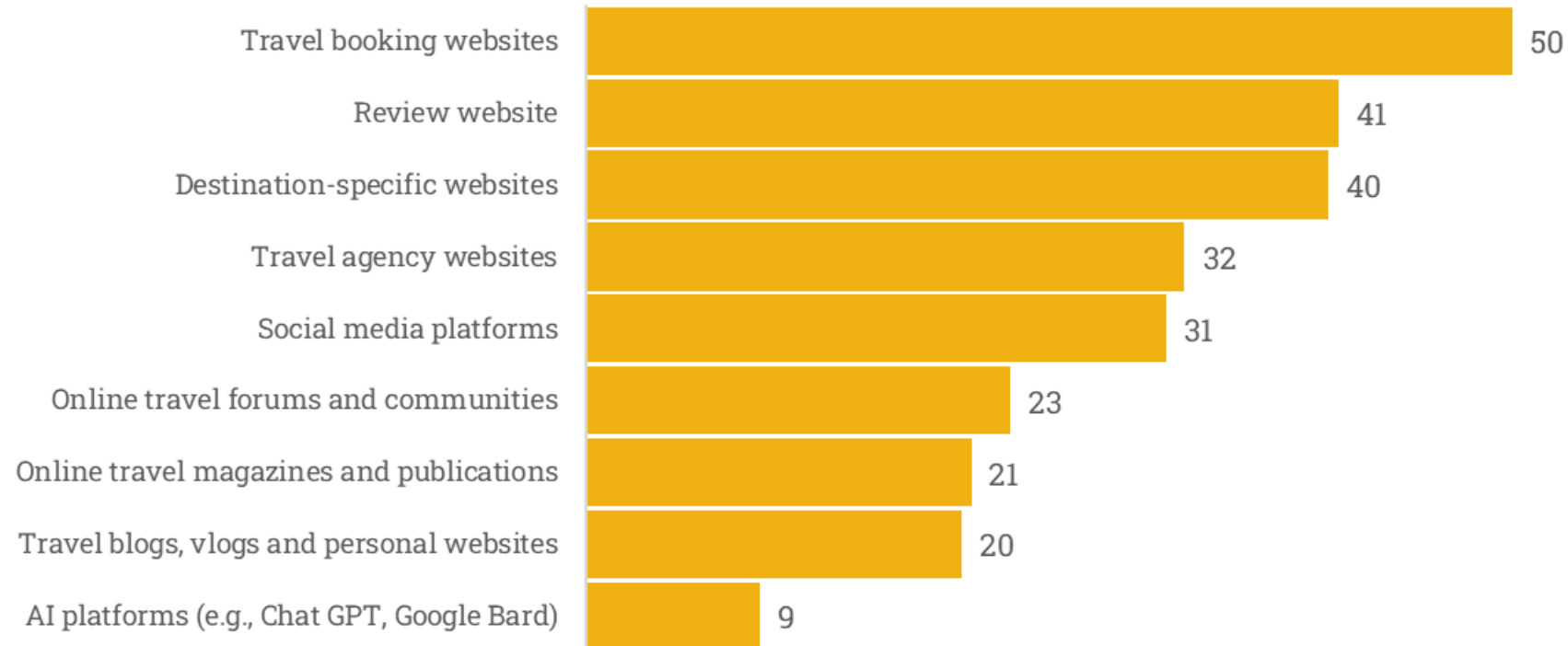
## Sources of Information for Destination Selection (%)



Note: French 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: French 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	61 %
YouTube	61 %
Facebook/META	59 %
Snapchat	38 %
Tik Tok	38 %
LinkedIn	30 %
Twitter/X	30 %
Pinterest	22 %
Reddit	5 %
Tumblr	2 %

Note: French 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)



# FRANCE

---

## Likelihood of how 2025 will evolve:

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

53%

Global wars/strife will impact the destinations visited in 2025

52%

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

44%

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

42%

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

40%

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

# Resources



# Market Profiles

## Global Partner Program

