

TRAVEL · SOUTH  USA

TENNESSEE

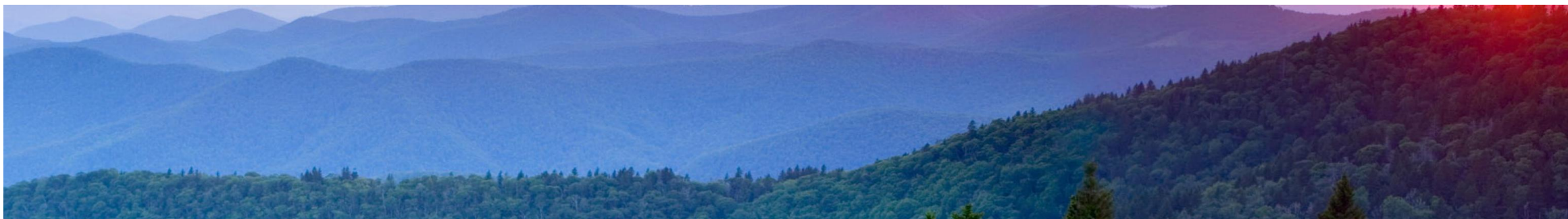
TENNESSEE
SOUNDS PERFECT

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

Tennessee's International Visitor Economy

TRAVEL · SOUTH  USA

Highlighting the State's Global Interconnectivity



Outlook

- By 2025, forecasted to reach **\$835 million** and **614,000 visitors**

US Inbound Travel Rebound – Key Markets

- International inbound spending is expected to decline by 5% from 2024, a 9% decrease compared to 2019.
- **Japan, India and Brazil are projected to grow in 2025, with Australia, South Korea and Sweden remaining flat.**
- Fueled by visitors from **Canada, United Kingdom/Ireland, DACH Region, Australia, India, Brazil, Benelux, Nordics, France, and China**, accounting for **65%** of the state's international tourism expenditures

Exports by Market

- **6,000 companies exported \$39 billion** worth of goods
- Exports to **Canada, Mexico, China, Benelux, Japan, and Germany** are among the top origin markets of visitation
- **China and India** account for half of the international student population
- **82%** of visits are non-business related

Tennessee's International Visitor Economy

Highlighting the State's Global Interconnectivity, cont.

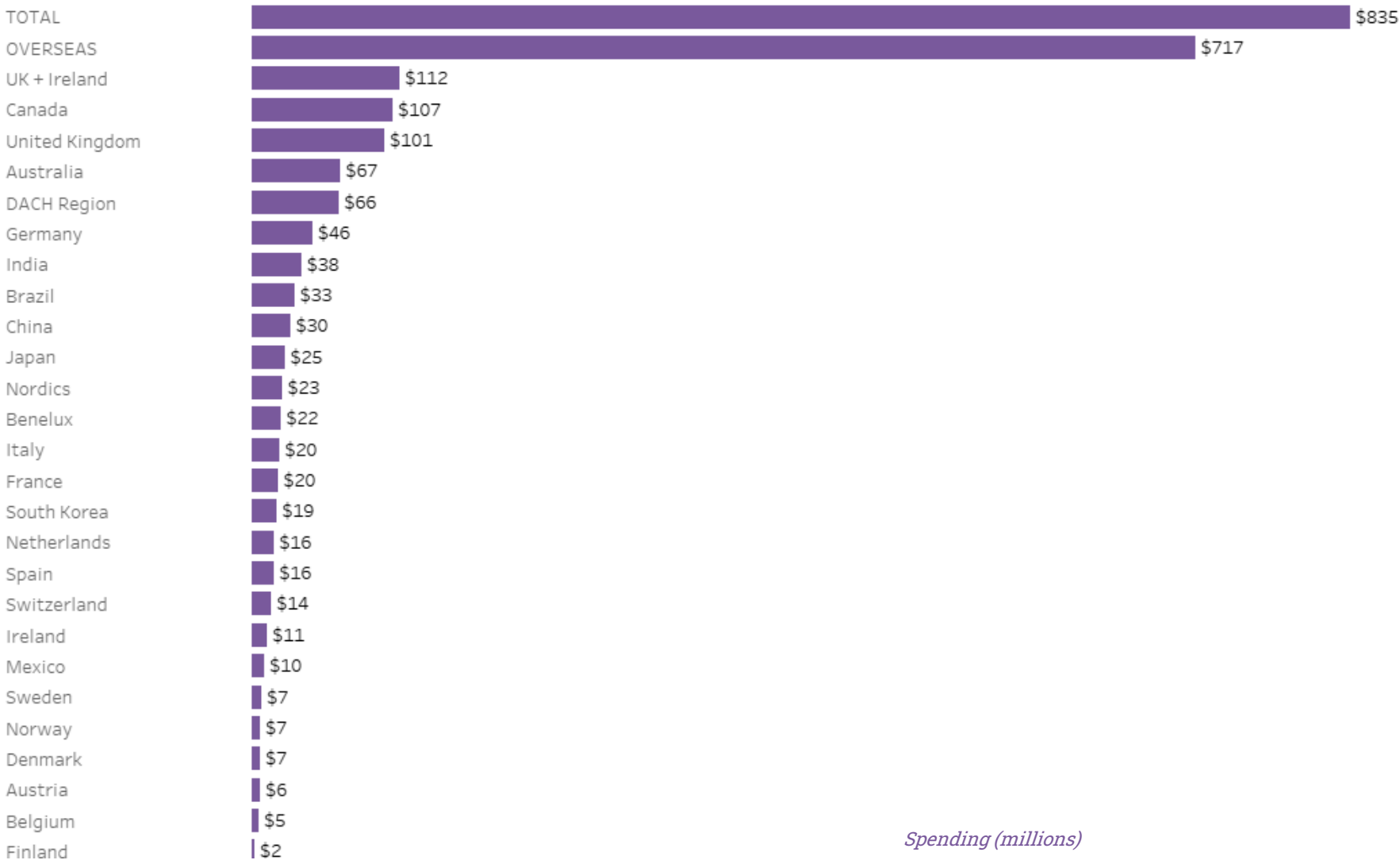
- Tennessee's investment in regional marketing amplifies the state's brand internationally and targets high-value travelers, enhancing regional economies and diversifying the visitor economy.
- Collaborative marketing efforts under Travel South USA (TSUSA) further strengthen Tennessee's strategic advantage.
- Major gateway airports like Atlanta, Charlotte, Chicago O'Hare, Dallas, and Washington-Dulles allow easy access to the state.
- Proximity to neighboring states— Alabama, Arkansas, Georgia, Kentucky, Mississippi, Missouri, North Carolina, and Virginia—attracts international travelers interested in the Travel South's natural beauty, cultural heritage, and connectivity, thus enriching Tennessee's tourism landscape.



Visitor Economy

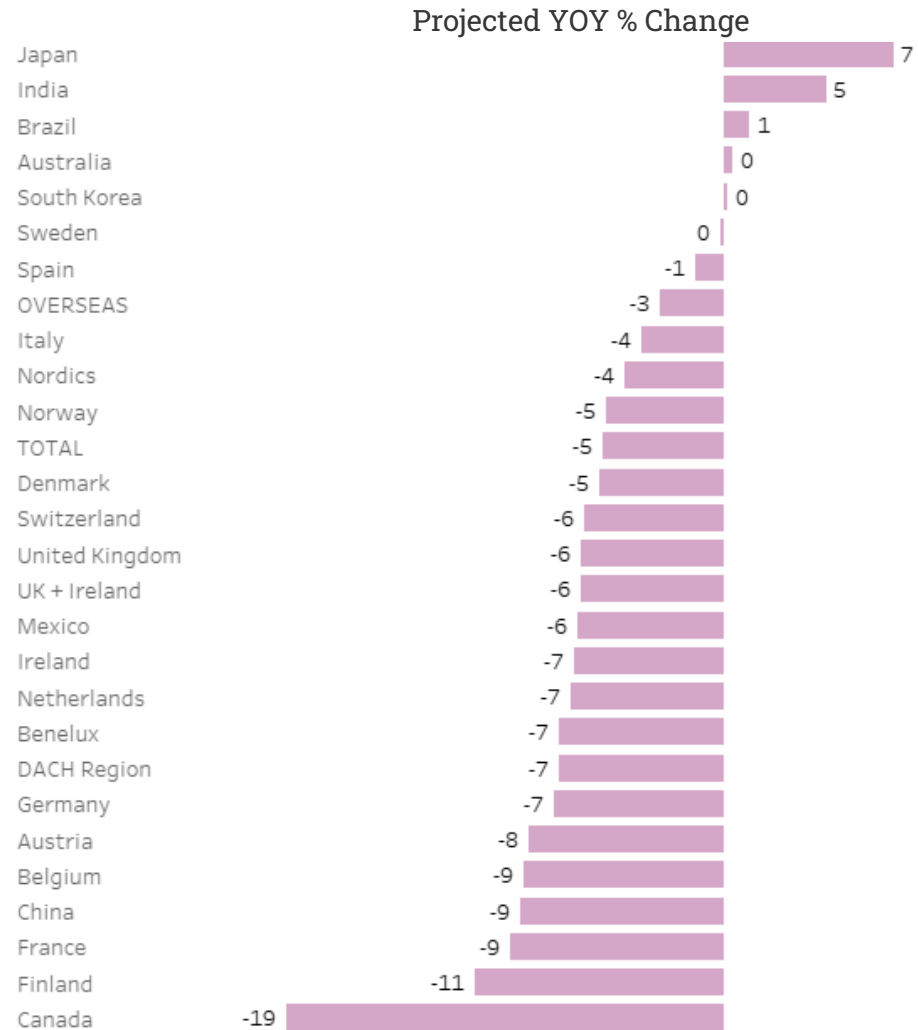
April 15, 2025

2025 Outlook: Visitor Spending by Key Markets

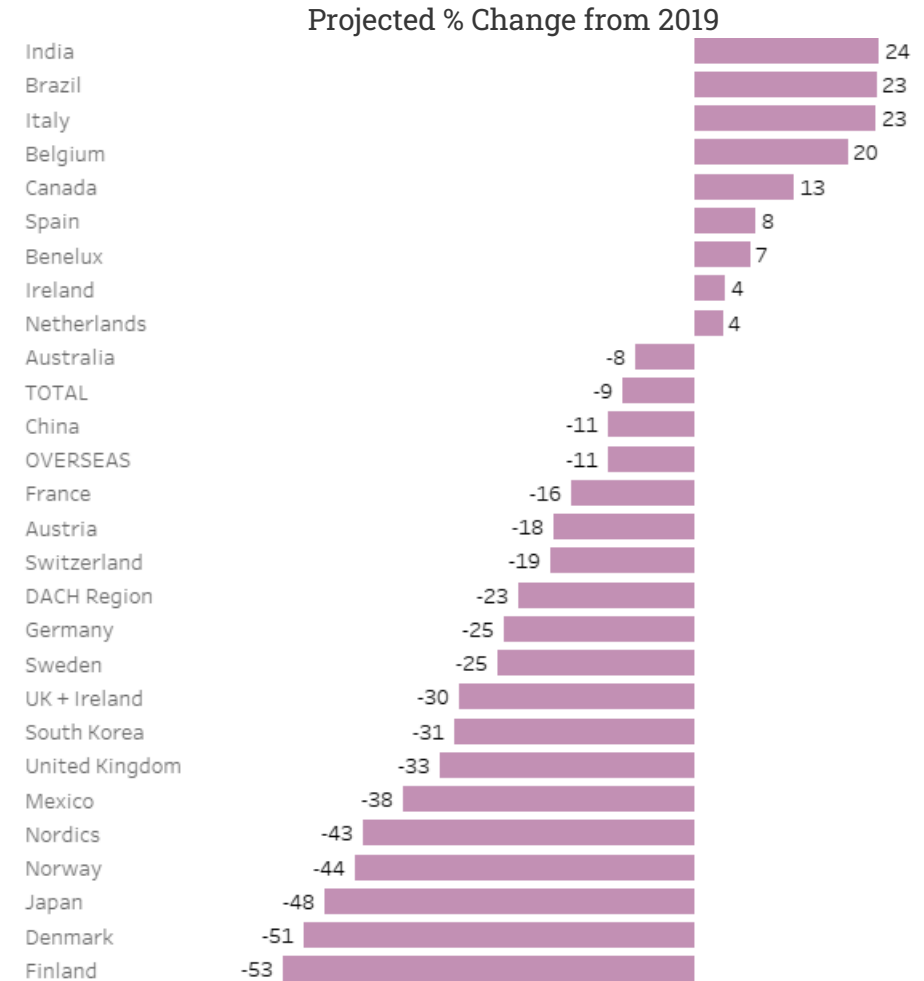


Spending (millions)

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

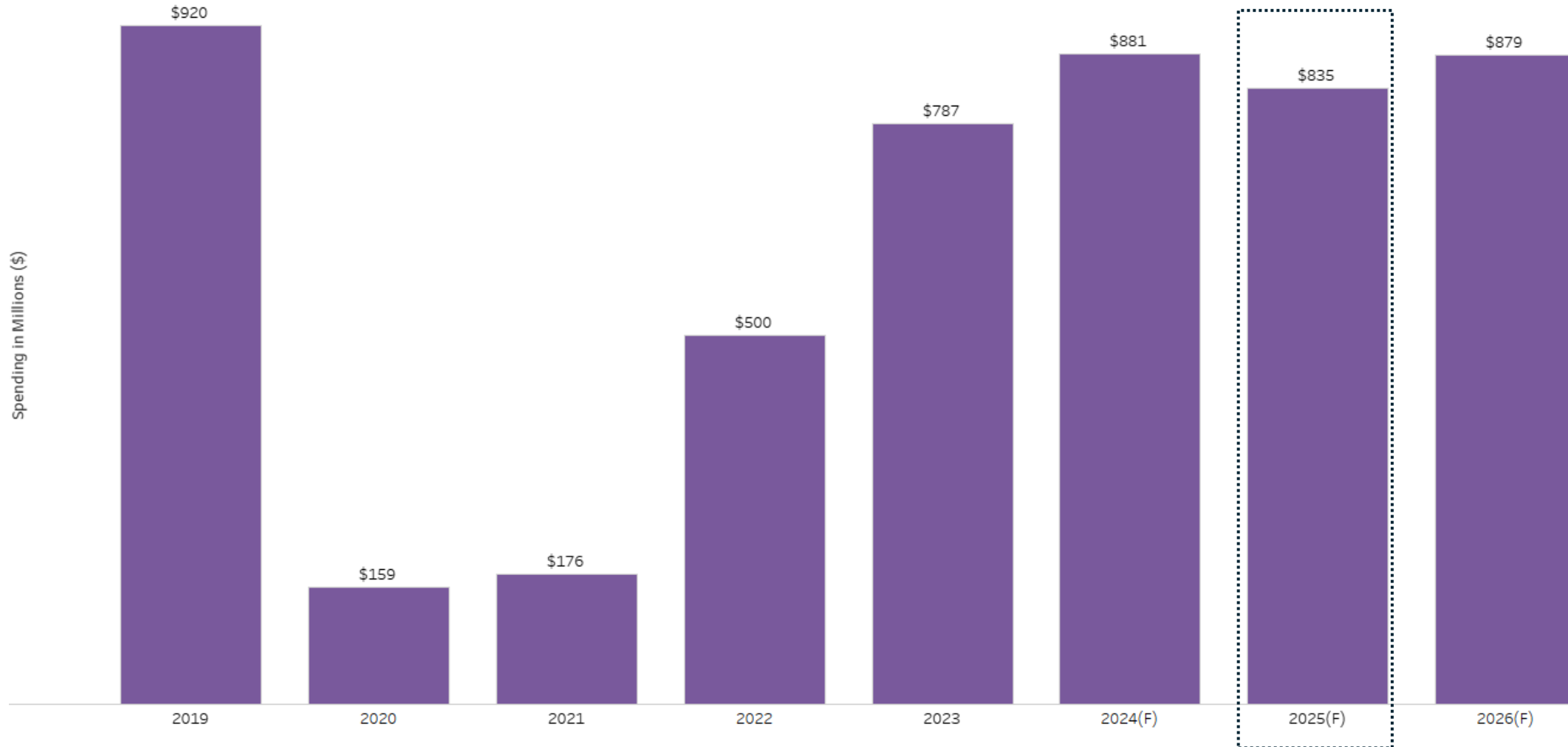


2019 Baseline Comparison



TENNESSEE

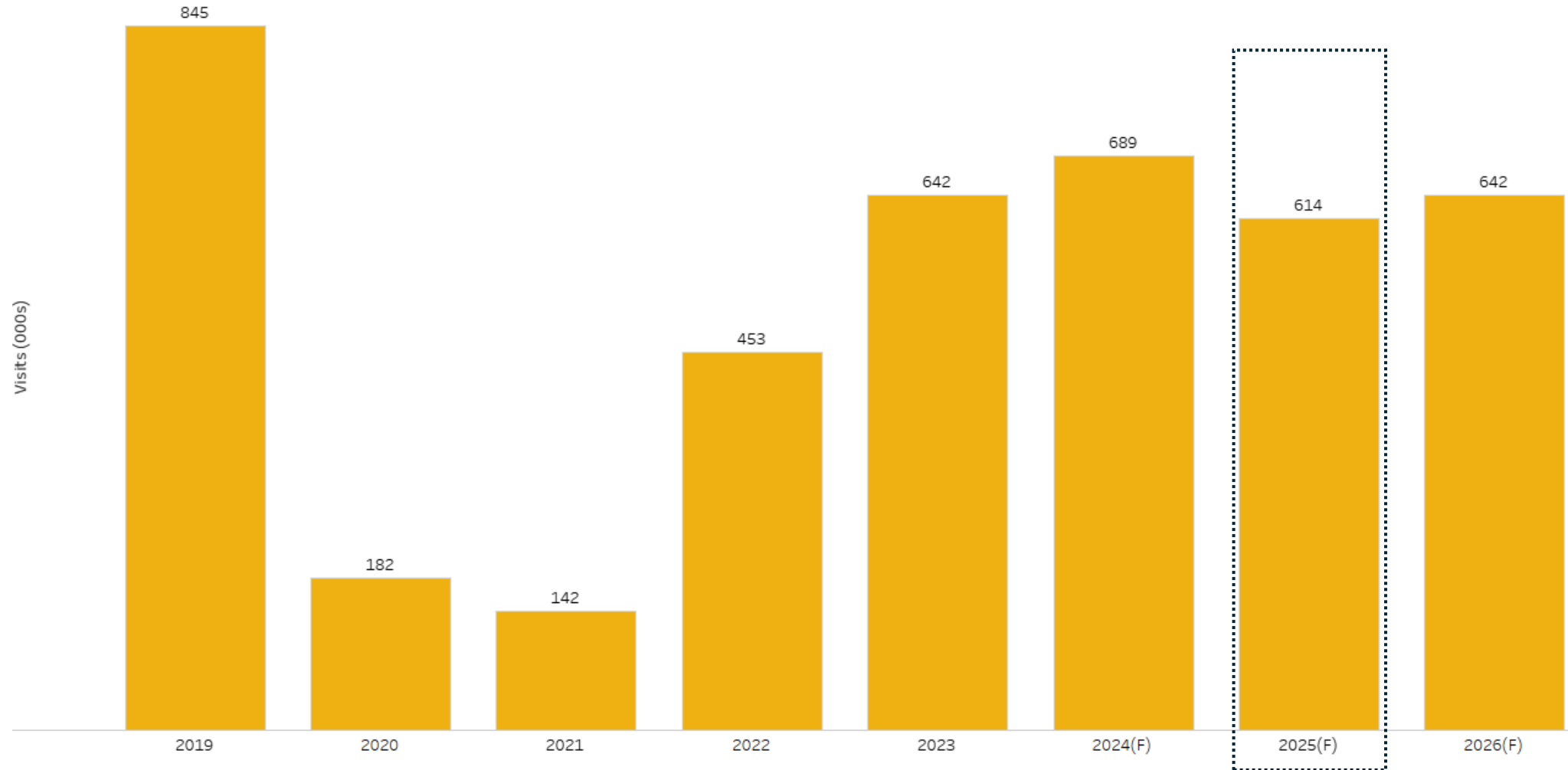
2025 Spending Outlook: Down 5% from 2024, still below 2019



TENNESSEE



2025 Visitor Volume Outlook: Down 11% from 2024, still below 2019



TENNESSEE

\$835M Projected Spend and 614,000 Visits in 2025, down 5% and 11% from 2024

- Tourism Economics estimates **Overseas spending** to decline by **3% year-over-year (yoy)** in 2025 – **Canada, a 19% decline**
- Japan, India and Brazil** are projected to grow in 2025, with **Australia, South Korea and Sweden** remaining flat
- U.K./Ireland, Canada, Australia, 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	835		-5	614	-11	-9	-27
OVERSEAS	717		-3	377	-4	-11	-24
UK + Ireland	112		-6	65	-7	-30	-35
Canada	107		-19	210	-21	13	-34
United Kingdom	101		-6	59	-7	-33	-34
Australia	67		0	23	-1	-8	-43
DACH Region	66		-7	36	-8	-23	-31
Germany	46		-7	27	-9	-25	-31
India	38		5	23	1	24	44
Brazil	33		1	13	-4	23	31
China	30		-9	11	-8	-11	-44
Japan	25		7	19	7	-48	-49
Nordics	23		-4	13	-5	-43	-47
Benelux	22		-7	15	-8	7	-9
Italy	20		-4	13	-5	23	-9
France	20		-9	14	-10	-16	-38
South Korea	19		0	10	-1	-31	-42
Netherlands	16		-7	12	-8	4	-5
Spain	16		-1	11	-5	8	-26
Switzerland	14		-6	6	-6	-19	-37
Ireland	11		-7	7	-6	4	-40
Mexico	10		-6	28	-8	-38	-7

TENNESSEE



\$835M Projected Spend and 614,000 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	4	4	-2	68	57
Israel	7	11	5	6	19	42
Sweden	7	0	5	-3	-25	-36
Norway	7	-5	3	-3	-44	-53
Taiwan	7	18	4	10	-46	-6
Denmark	7	-5	3	-8	-51	-51
Ukraine	7	9	1	7	91	-51
United Arab Emirates	6	2	2	4	-34	-41
Austria	6	-8	4	-9	-18	-20
Belgium	5	-9	3	-8	20	-22
Turkiye	5	4	2	1	122	16
Argentina	4	5	3	1	1	-28
Philippines	4	0	3	1	-8	-3
Portugal	4	-4	2	-5	16	18
South Africa	4	2	2	-1	-42	-51
Saudi Arabia	3	-1	2	0	-43	-54
Singapore	3	4	2	4	-32	-42
Czech Republic	3	-8	1	-9	31	-1
Hong Kong	2	0	1	2	-50	-39
Russia	2	9	1	8	-76	-76
Egypt	2	-7	1	-6	-65	-44
Hungary	2	1	1	-2	-2	3
Finland	2	-11	1	-7	-53	-55
Thailand	2	0	1	2	-31	-45
Greece	2	-5	1	-6	-29	-14
Morocco	1	-6	0	-5	33	8
Vietnam	1	2	1	2	-49	33
Indonesia	1	-7	1	-4	-21	-33
Croatia	1	-2	1	0	176	100
Bulgaria	1	6	0	2	-10	17
Malaysia	1	1	0	0	-55	-52

Source: Tourism Economics | 04.15.2025

TENNESSEE



Visitor Spending 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F) ₪
Spending (\$M)	TOTAL	\$920	\$159	\$176	\$500	\$787	\$881	\$835
	OVERSEAS	\$809	\$134	\$160	\$413	\$649	\$738	\$717
	UK + Ireland	\$162	\$20	\$11	\$93	\$110	\$120	\$112
	Canada	\$95	\$20	\$9	\$78	\$129	\$133	\$107
	Australia	\$73	\$11	\$2	\$33	\$54	\$67	\$67
	DACH Region	\$86	\$10	\$11	\$50	\$69	\$71	\$66
	India	\$31	\$7	\$12	\$17	\$28	\$36	\$38
	Brazil	\$27	\$5	\$5	\$18	\$27	\$33	\$33
	China	\$34	\$8	\$11	\$4	\$17	\$33	\$30
	Japan	\$49	\$8	\$4	\$9	\$23	\$24	\$25
	Nordics	\$40	\$6	\$3	\$22	\$24	\$24	\$23
	Benelux	\$20	\$3	\$2	\$16	\$21	\$23	\$22
	Italy	\$17	\$2	\$3	\$14	\$19	\$21	\$20
	France	\$23	\$3	\$4	\$12	\$19	\$22	\$20
	South Korea	\$27	\$7	\$15	\$10	\$16	\$19	\$19
	Spain	\$15	\$2	\$4	\$14	\$16	\$17	\$16
	Mexico	\$16	\$5	\$7	\$9	\$9	\$11	\$10

TENNESSEE



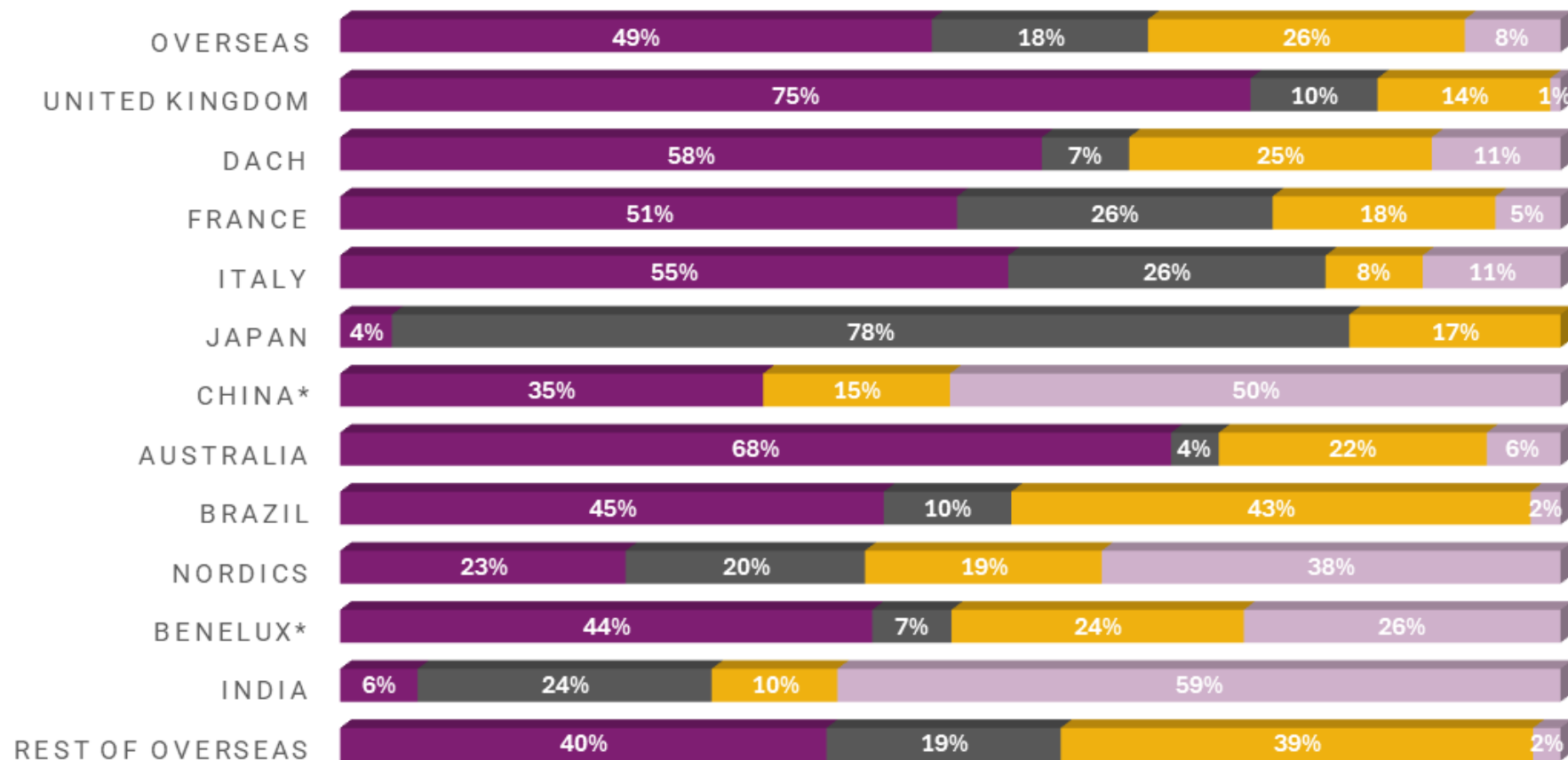
Visits 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Visits (000s)	TOTAL	845	182	142	453	642	689	614
	OVERSEAS	496	105	93	243	358	394	377
	Canada	319	65	34	187	257	265	210
	UK + Ireland	100	17	9	57	65	70	65
	DACH Region	53	10	8	28	37	40	36
	Mexico	30	12	16	23	26	31	28
	Australia	40	7	2	13	21	23	23
	India	16	4	6	10	17	22	23
	Japan	36	8	3	6	15	17	19
	Benelux	17	5	2	13	16	17	15
	France	22	5	4	9	14	15	14
	Brazil	10	2	2	7	11	14	13
	Italy	14	2	3	9	12	13	13
	Nordics	24	5	2	12	14	13	13
	China	20	3	2	2	8	12	11
	Spain	15	3	5	11	11	11	11
	South Korea	17	5	3	6	9	10	10

TENNESSEE

TENNESSEE: Purpose of Trip

Leisure Business VFR Other



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

Exports (Goods)

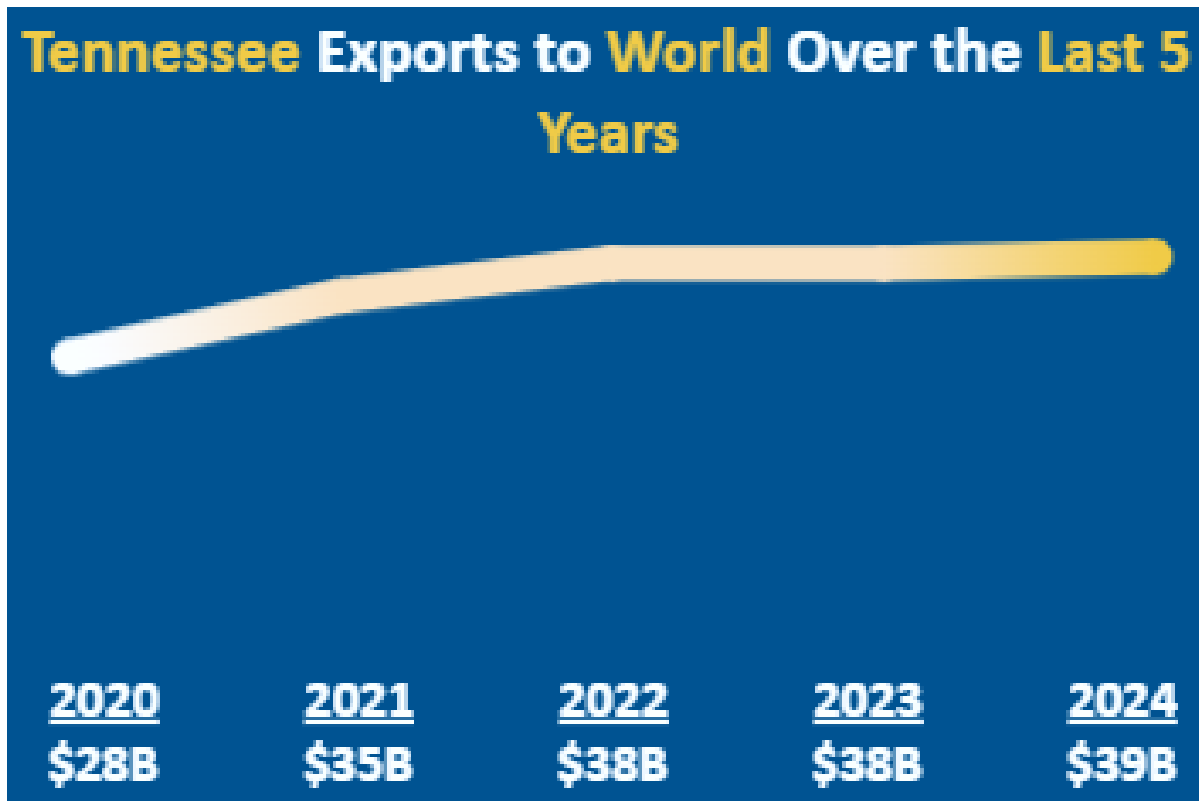


EXPORTS IN GOODS *2024*

\$39 Billion

TOP COUNTRIES

CANADA
MEXICO
CHINA
NETHERLANDS
JAPAN
BELGIUM



Goods Exports by Country

(in millions)

Partner	2024
World	\$38,948
Canada	\$7,785
Mexico	\$6,711
China	\$3,394
Netherlands	\$2,854
Japan	\$1,926
Belgium	\$1,330
Germany	\$1,269
Hong Kong	\$1,191
Singapore	\$945
Brazil	\$868
Australia	\$816
United Kingdom	\$811
India	\$648
United Arab Emirates	\$621
South Korea	\$561

EXPORTERS

5,887

Tennessee companies exported goods in
2021

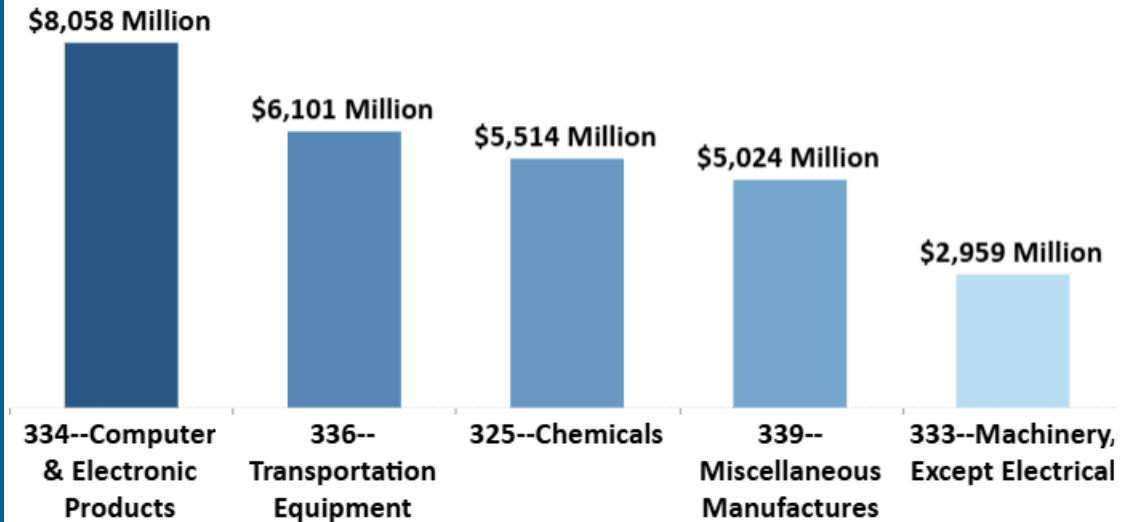
82%

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

* SMEs are businesses that employ fewer than 500 employees.

TOP TRADE SECTORS

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



International Students

TENNESSEE

INTERNATIONAL
STUDENTS
2022/23

10,041

STUDENT-VISIT
RATIO

1.4%

INDEXED
STUDENT-VISIT
RATIO
U.S. = 100

131

TENNESSEE

INTERNATIONAL STUDENTS, 2023/24



10,041

International Students



26

Rank in the United States*



9.1

% Change from
Previous Year



\$370,297,697

Estimated International
Student Expenditure**

LEADING PLACES OF ORIGIN

Place of Origin	% Total
India	29.4
China	17.0
Nigeria	5.4
Bangladesh	3.5
Saudi Arabia	3.0

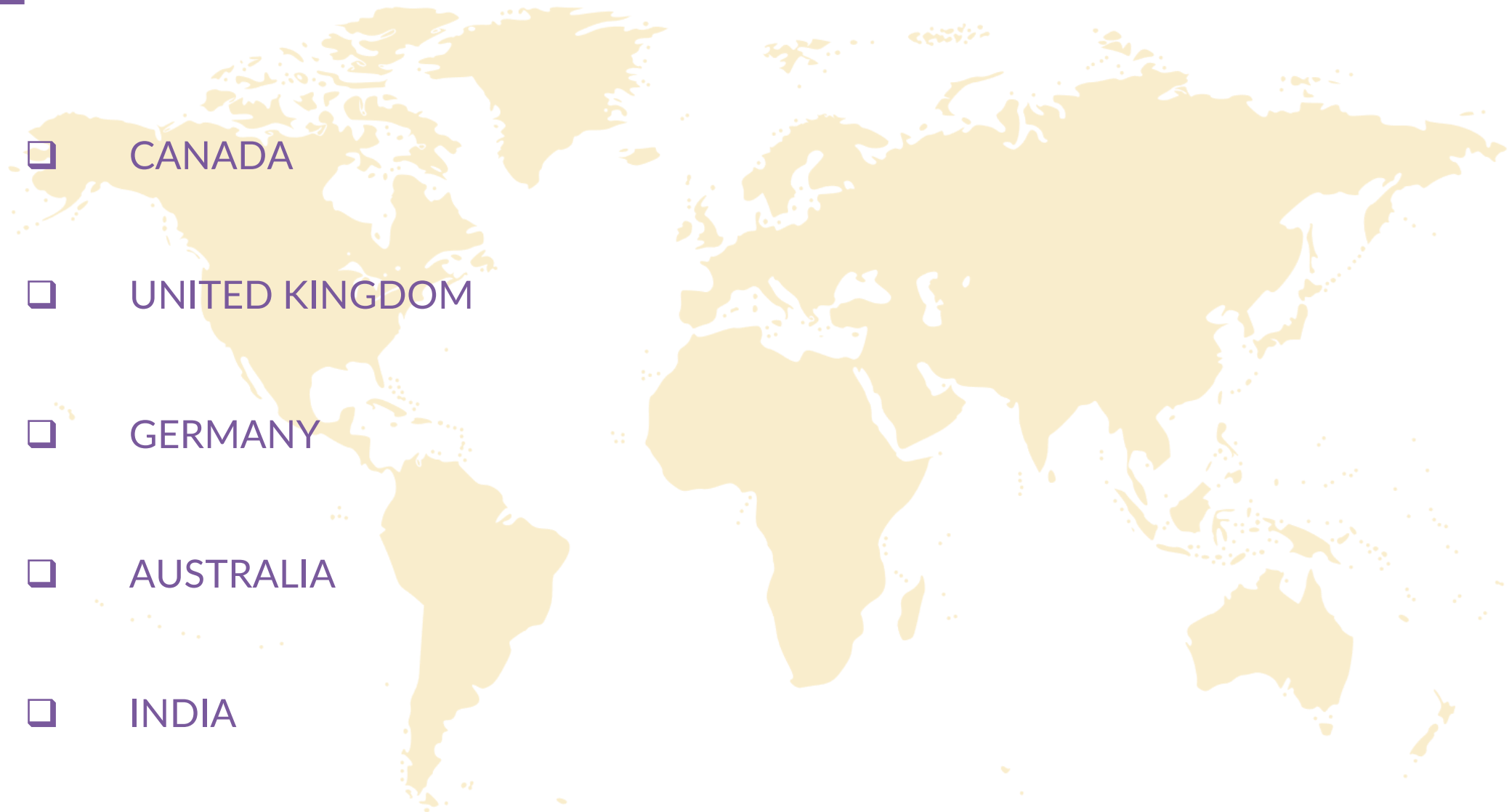
LEADING INSTITUTIONS

Institution	Total
Vanderbilt University	2,301
University of Memphis	2,134
University of Tennessee - Knoxville	1,522
Christian Brothers University	886
Middle Tennessee State University	496

Visitor Perception

MARKET PROFILES

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 & 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

44%

Likelihood to Visit Travel South
in the next Five Years

Note: Canadian visitors who are Likely to Travel Internationally

Most Important Content For Destination Decisions:



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

Source: Future Partners (2025)

CANADA

Recall of “Buzz”: Travel South
Destinations

20%

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



Note: Canadian visitors who are Likely to Travel Internationally

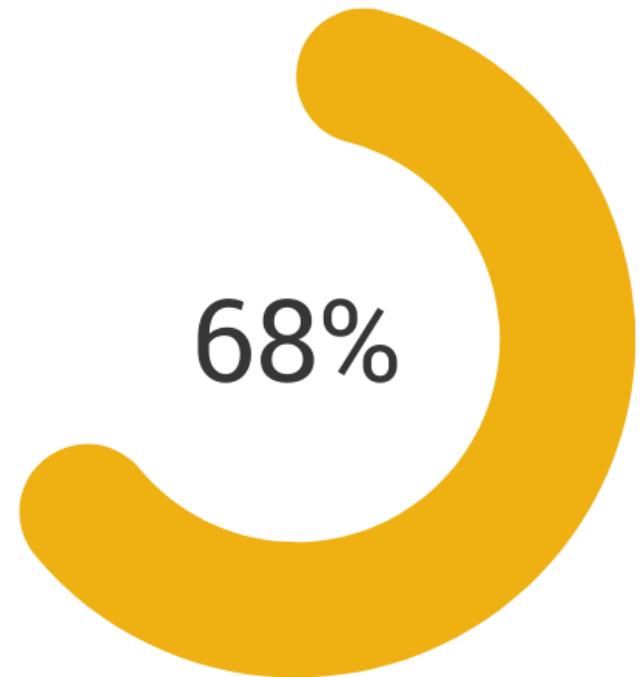
Source: Future Partners (2025)

CANADA



APPEAL

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



FAMILIARITY

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

CANADA



3.2

Average Number of Leisure
International Trips

1 Trip

30%

2 Trips

25%

3-4 Trips

26%

5+ Trips

19%

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

Source: Brand USA (Aug. 2024)

CANADA



1+ Trips

26%

1 Trip

17%

2 Trips

5%

3+ Trips

5%

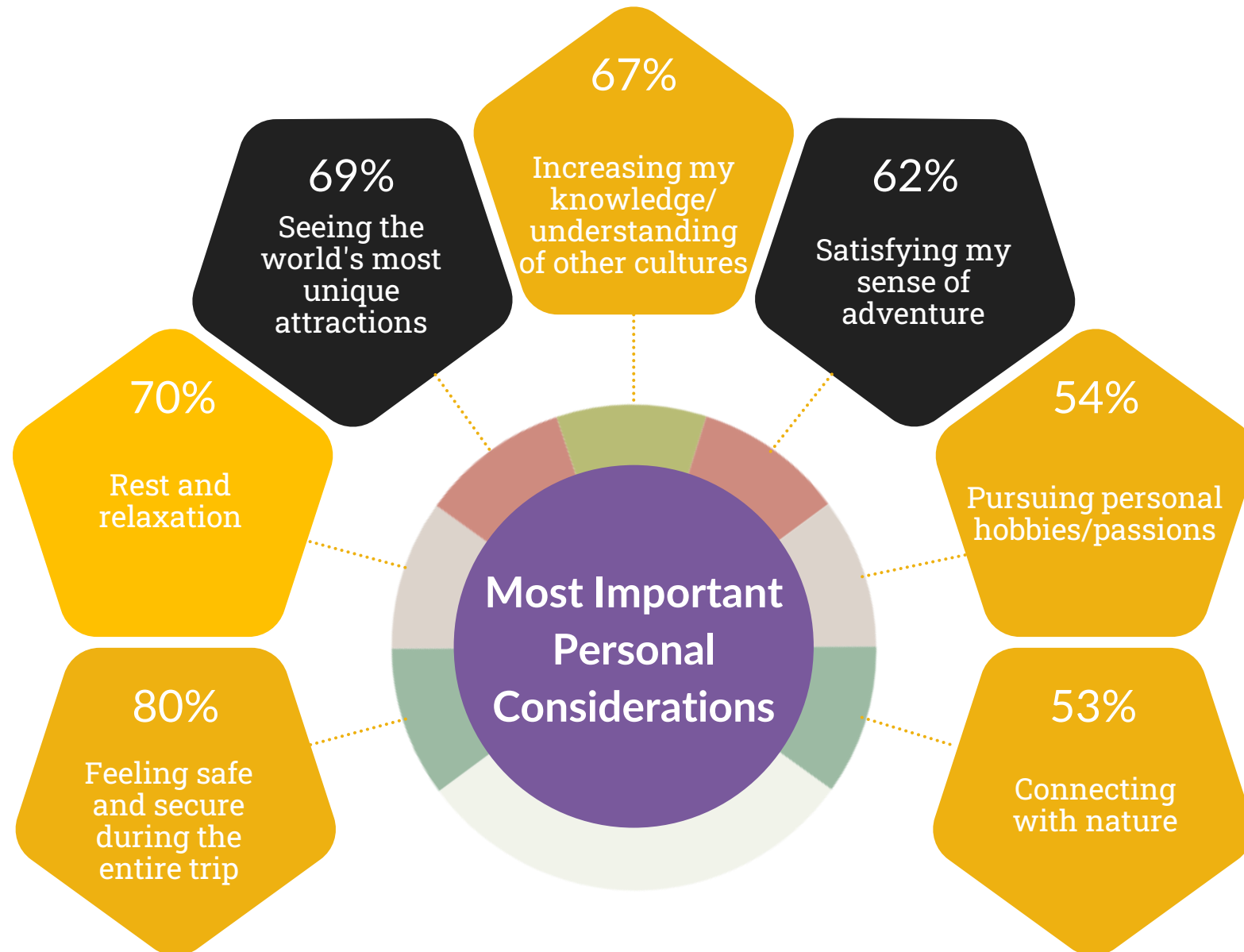
0.5

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

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

Source: Brand USA (Aug. 2024)

CANADA



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

Source: Brand USA (Aug. 2024)

CANADA

Most Important When Choosing a Destination

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

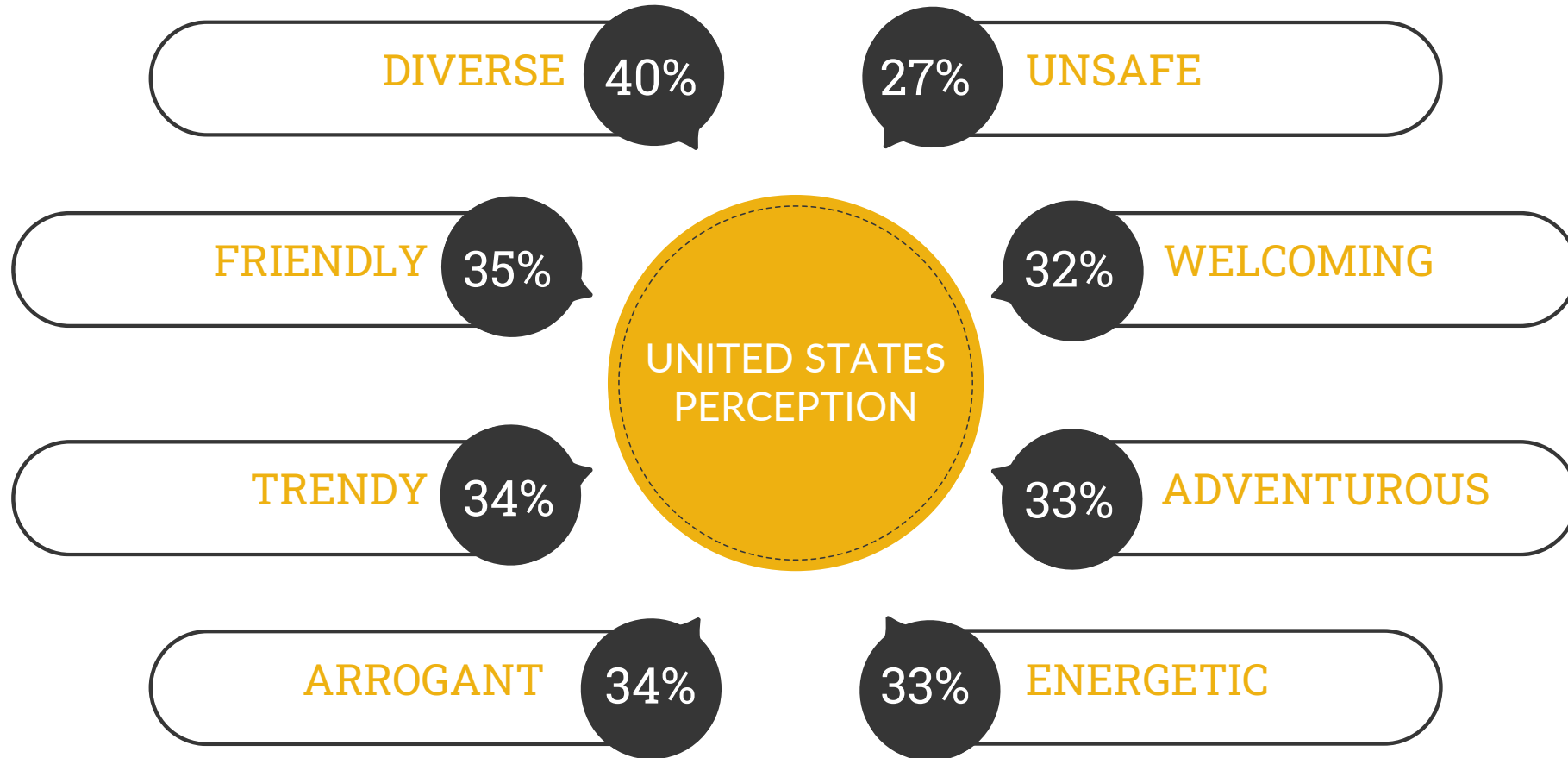
Most Discouraging From Visiting a Destination

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

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

Source: Brand USA (Aug. 2024)

CANADA



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

Source: Brand USA (Aug. 2024)

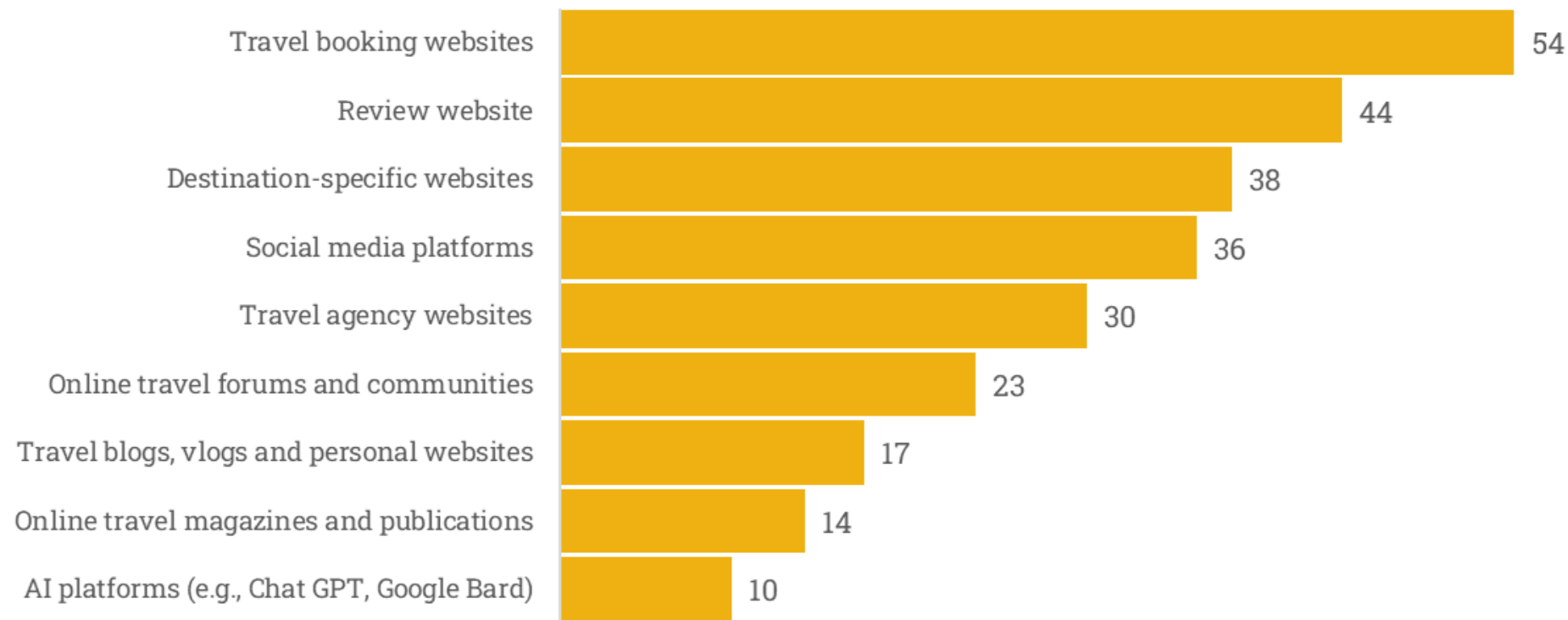
Sources of Information for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

Social Media Participation

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

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

Source: Brand USA (Aug. 2024)

CANADA

Likelihood of how 2025 will evolve:

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

52%

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

45%

Global wars/strife will impact the destinations visited in 2025

40%

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

33%

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

30%

Luxury travel experiences are an important part of leisure trips

UNITED KINGDOM



POPULATION
2024

69M

REAL GDP
GROWTH
2025 PROJECTION

1.5%

CURRENCY
RATE
BRITISH POUND
2024

0.78

INFLATION
RATE
2025 PROJECTION

2.1%

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

8.4%

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

15.4%

UNITED KINGDOM

49%

Likelihood to Visit Travel South
in the next Five Years

Note: United Kingdom visitors who are Likely to Travel Internationally

Most Important Content For Destination Decisions:



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

Source: Future Partners (2025)

UNITED KINGDOM

Recall of “Buzz”: Travel South
Destinations

27%

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



Note: United Kingdom visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

UNITED KINGDOM



APPEAL

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



FAMILIARITY

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

UNITED KINGDOM



4.0

Average Number of
International Trips

1 Trip

25%

2 Trips

23%

3-4 Trips

30%

5+ Trips

23%

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

Source: Brand USA (Aug. 2024)

UNITED KINGDOM



1+ Trip

30%

1 Trip

15%

2 Trips

10%

3+ Trips

5%

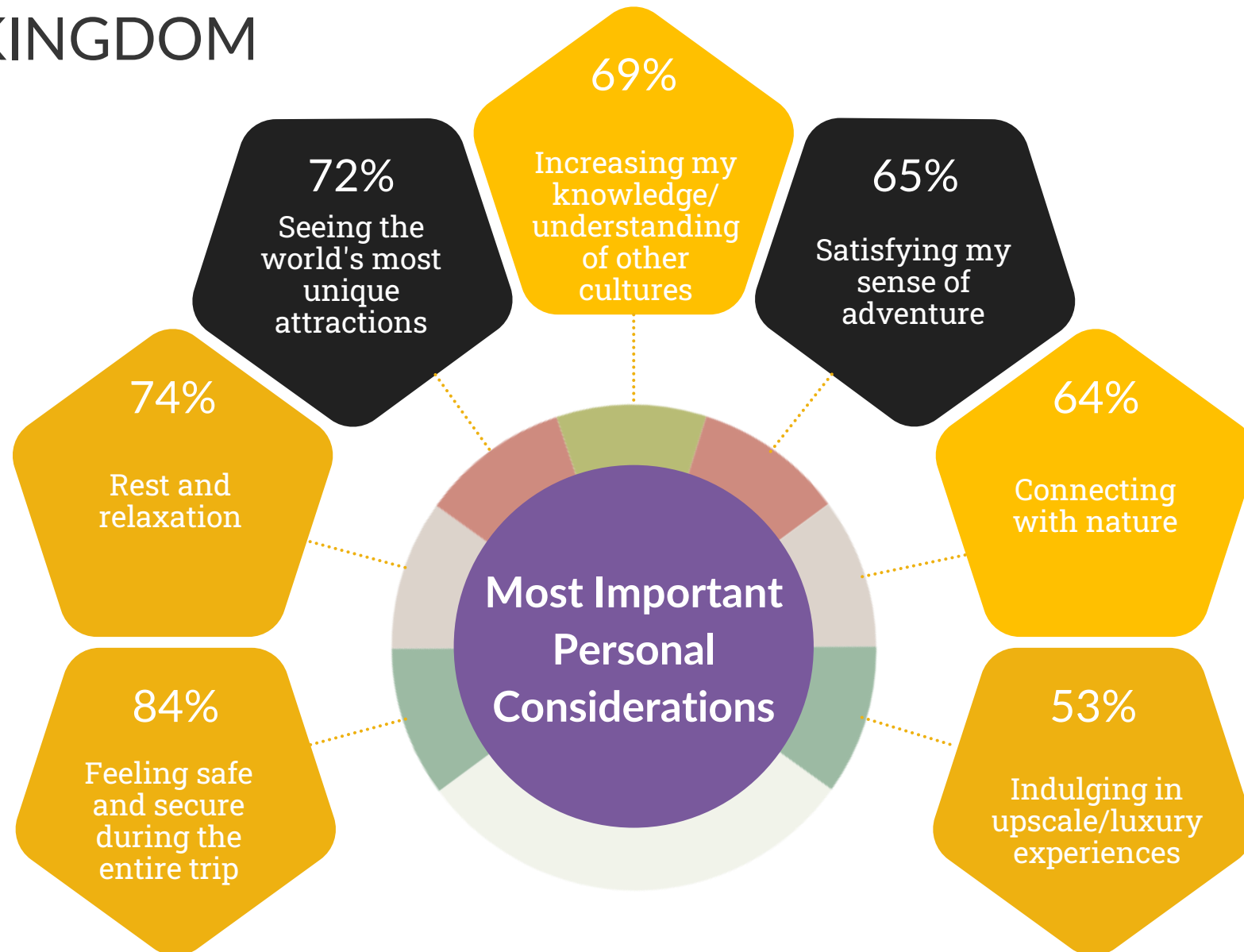
0.7

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

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

Source: Brand USA (Aug. 2024)

UNITED KINGDOM



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

Source: Brand USA (Aug. 2024)

UNITED KINGDOM

Most Important When Choosing a Destination

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

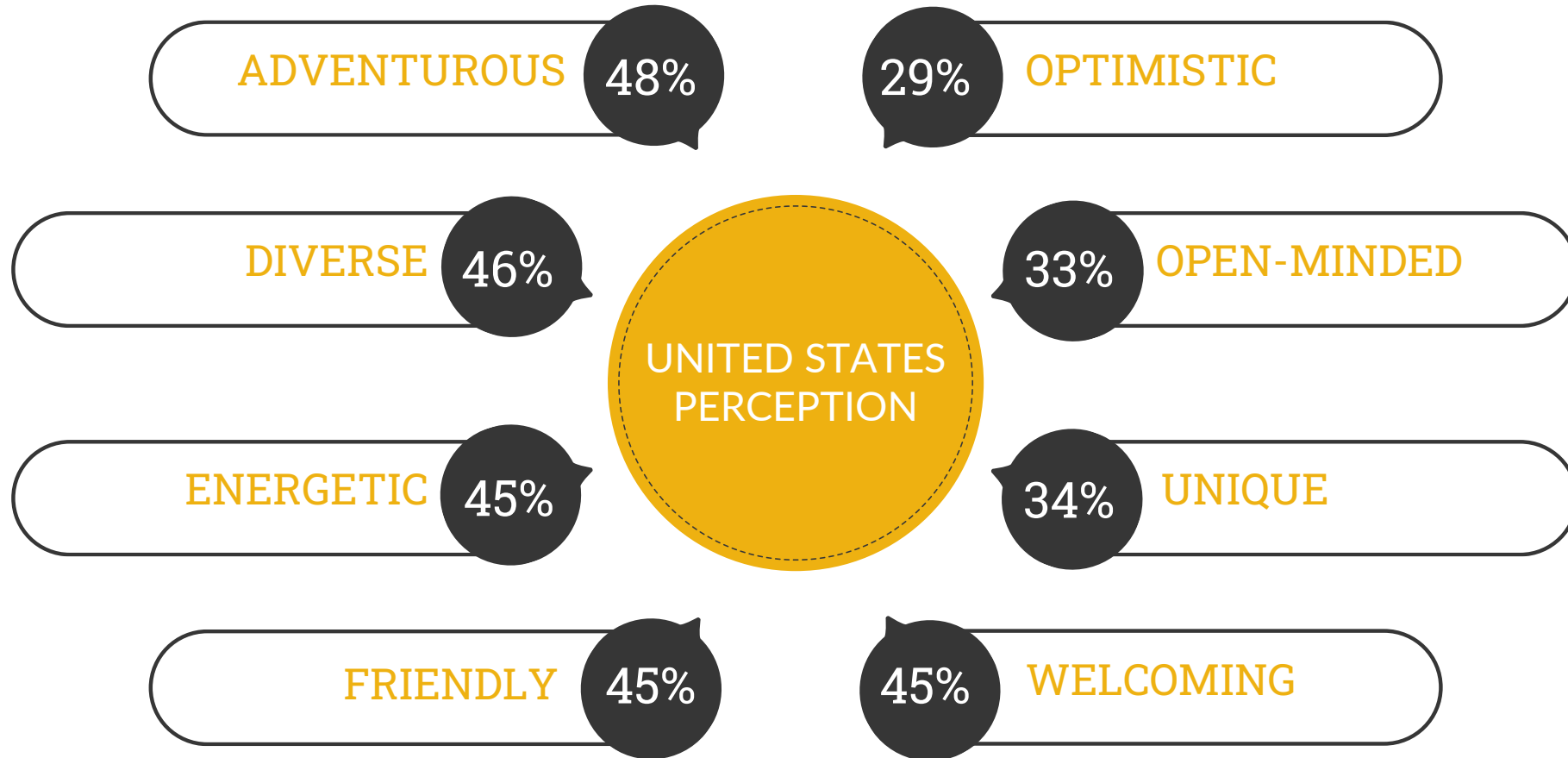
Most Discouraging From Visiting a Destination

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

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

Source: Brand USA (Aug. 2024)

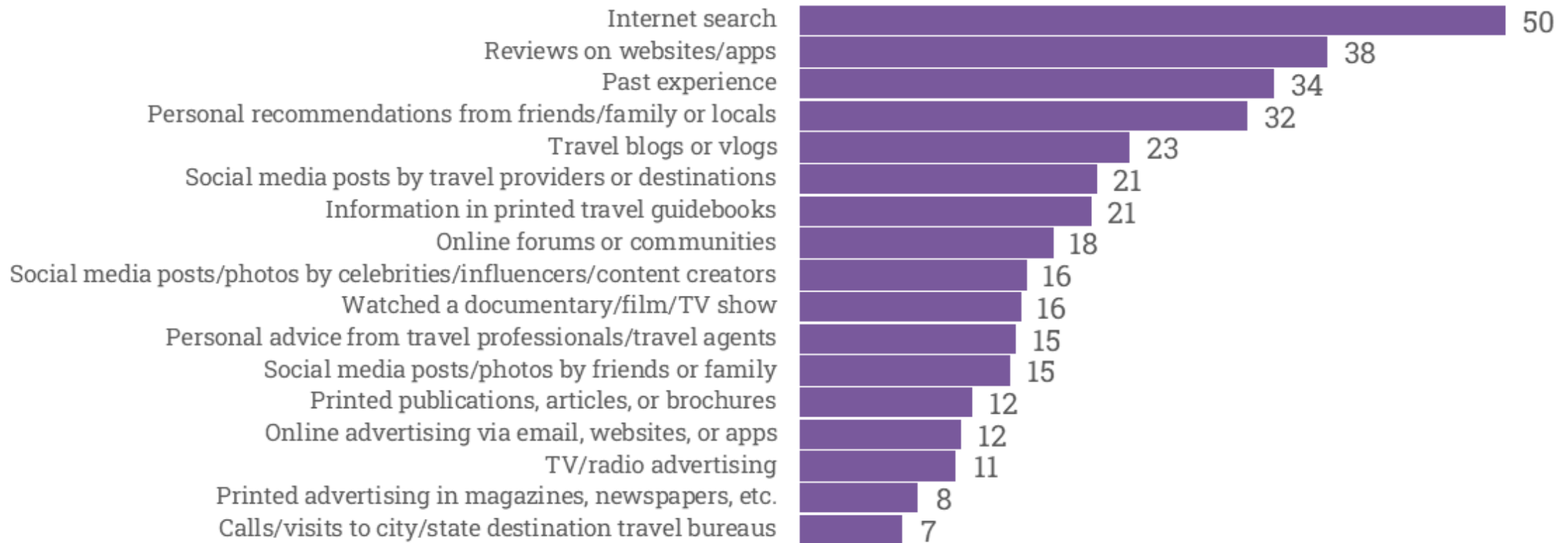
UNITED KINGDOM



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

Source: Brand USA (Aug. 2024)

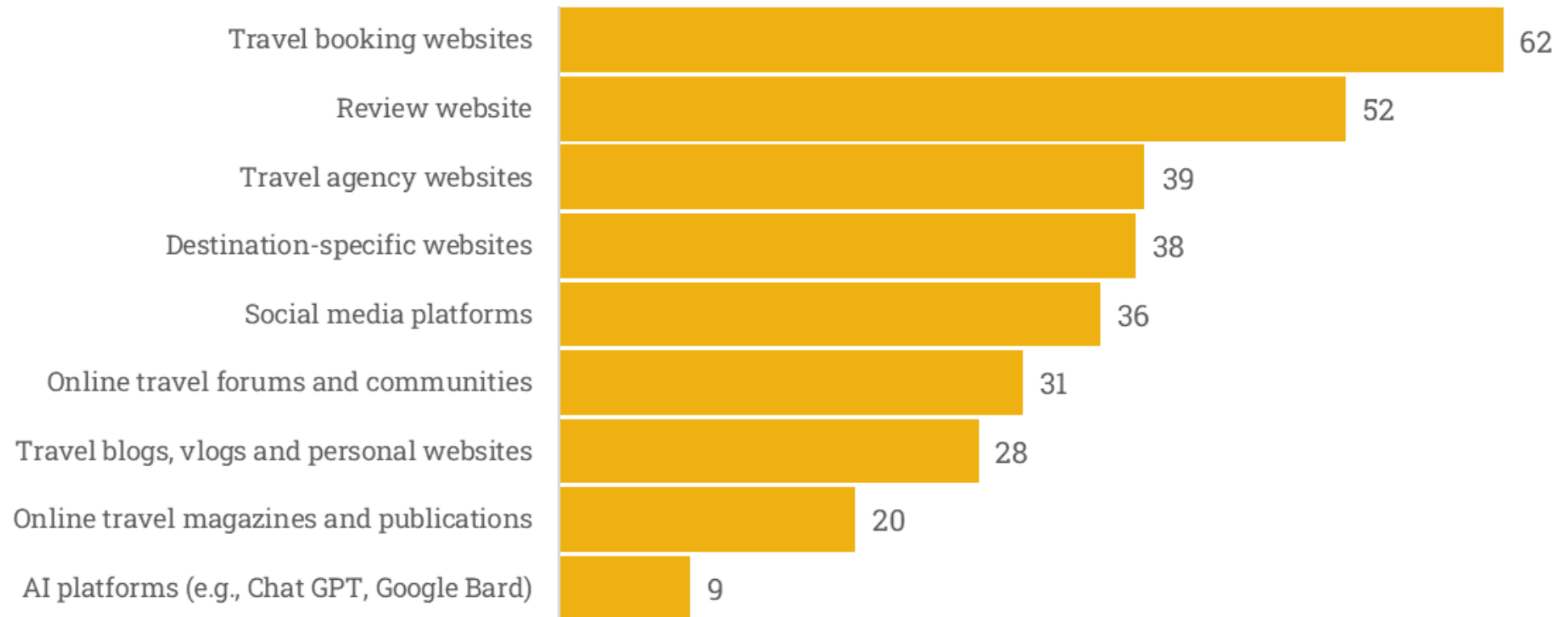
Sources of Information for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

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%

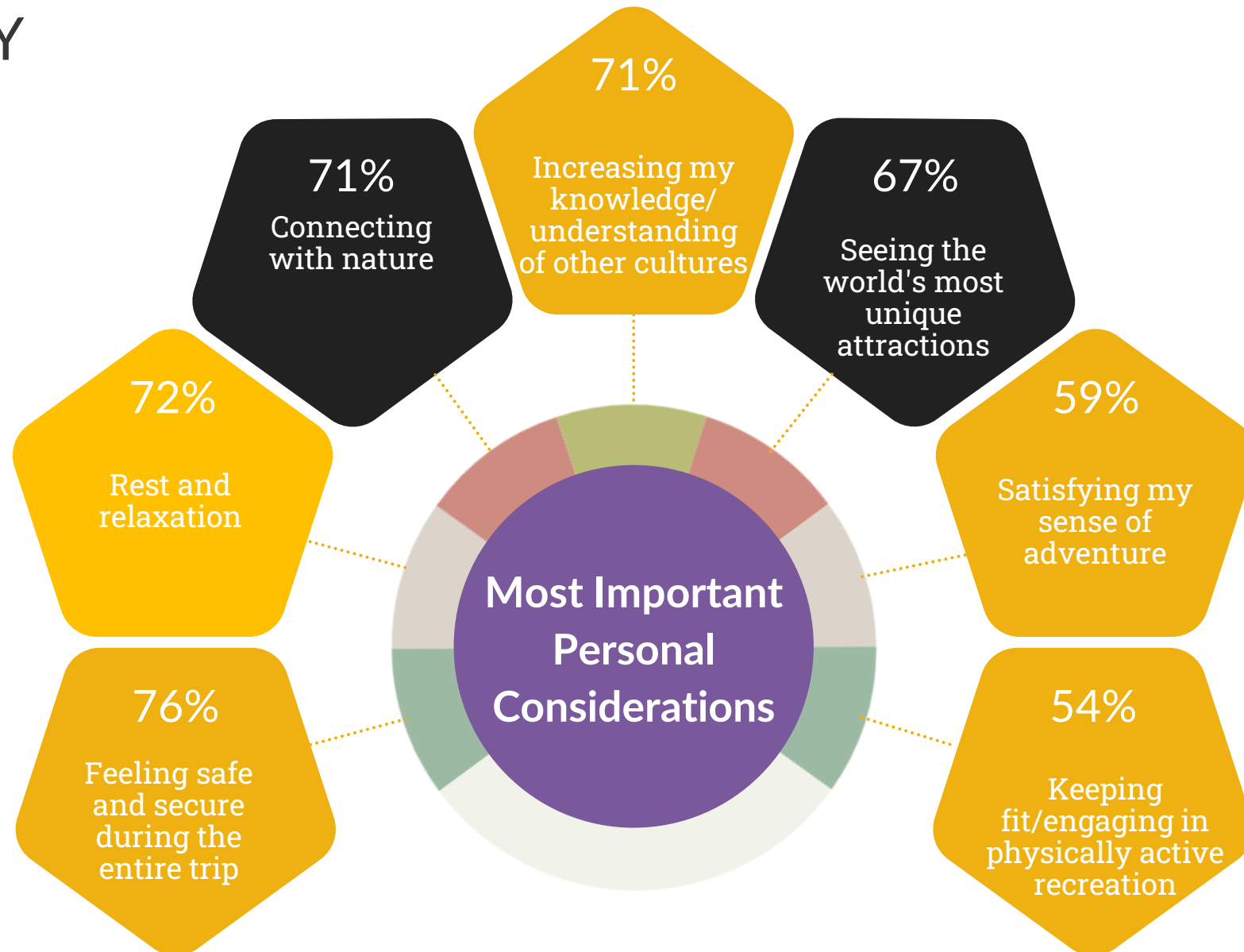
3+ Trips

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

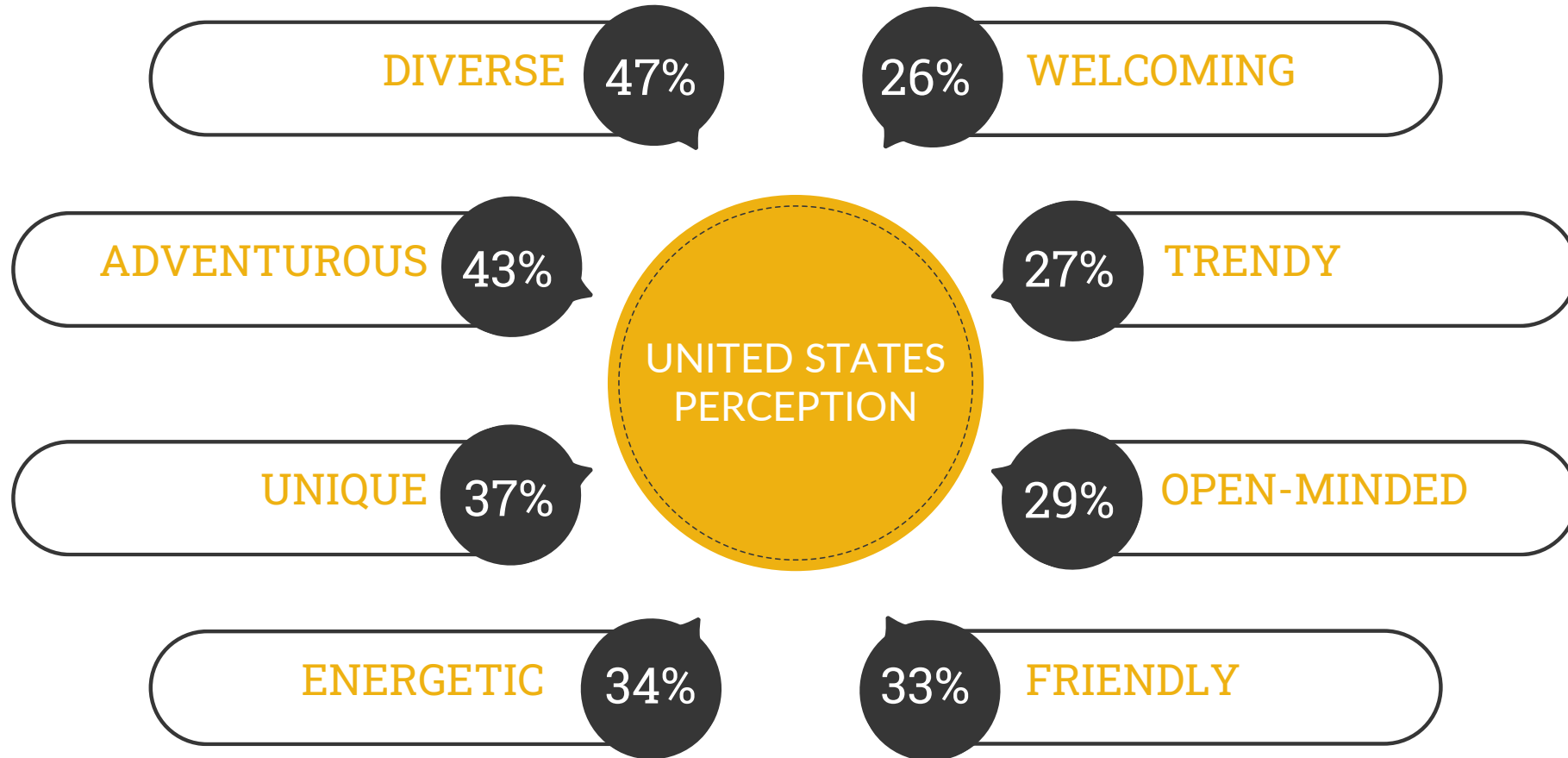
Most Discouraging From Visiting a Destination

- 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)

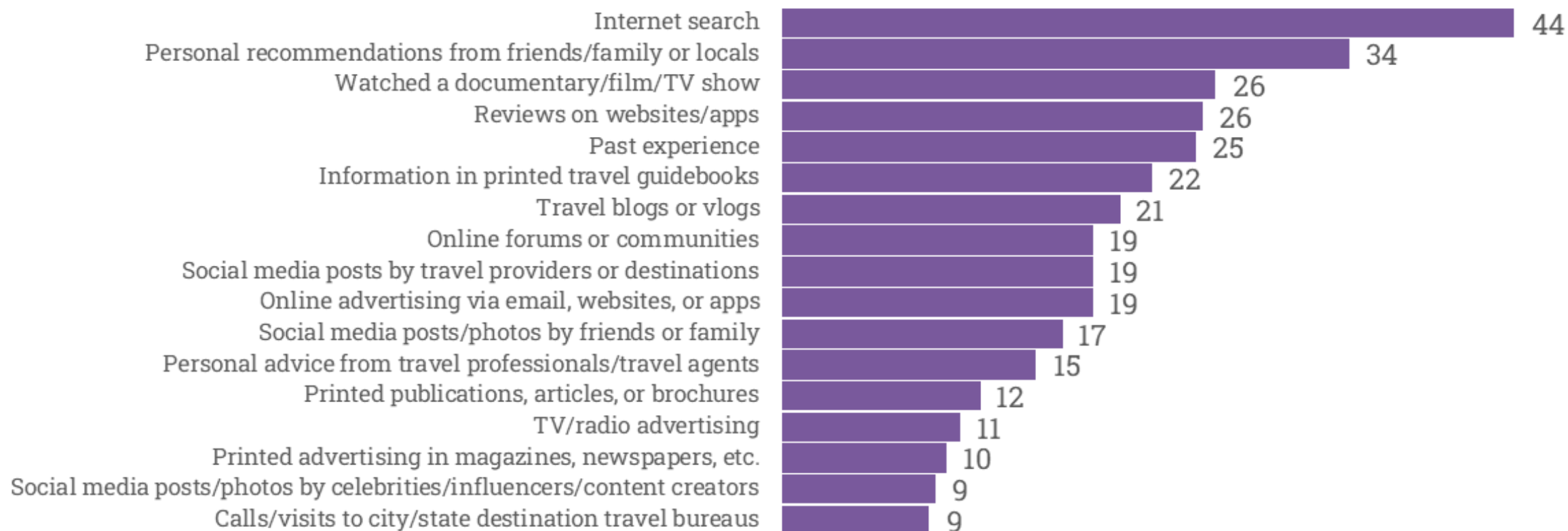
GERMANY



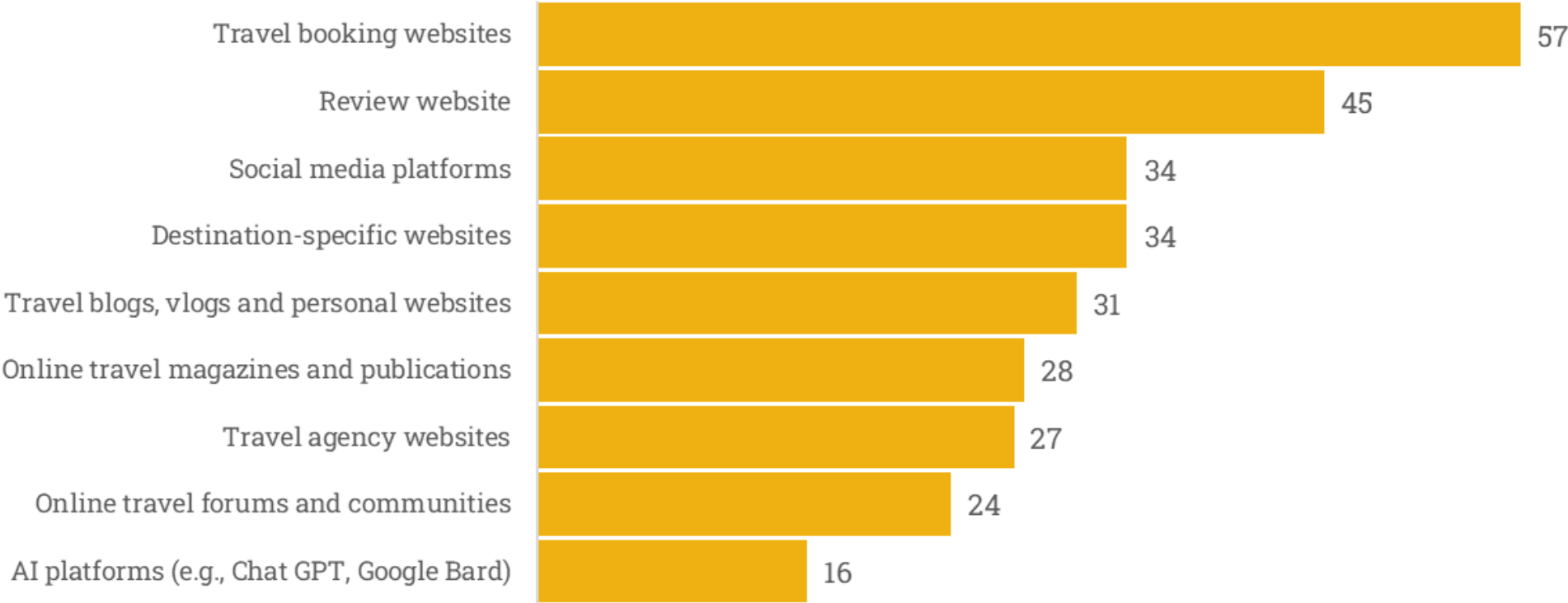
Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

Sources of Information for Destination Selection (%)



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

AUSTRALIA



POPULATION <i>2024</i>	REAL GDP GROWTH <i>2025 PROJECTION</i>	CURRENCY RATE AUSTRALIAN DOLLAR 2024	INFLATION RATE <i>2025 PROJECTION</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. GOODS & SERVICES EXPORTS</i>	TRAVEL & TOURISM <i>as a share of 2023 TOTAL U.S. SERVICES EXPORTS</i>
27M	2.1%	1.52	3.3%	11.3%	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%

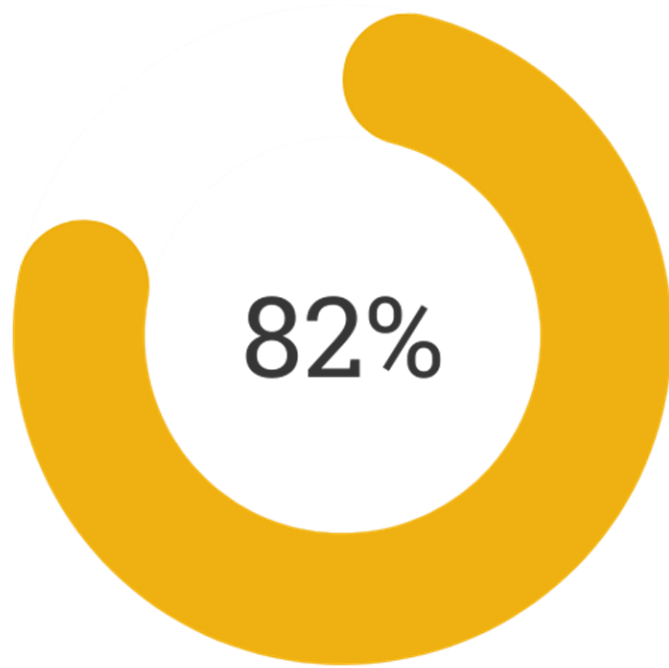
Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.



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%

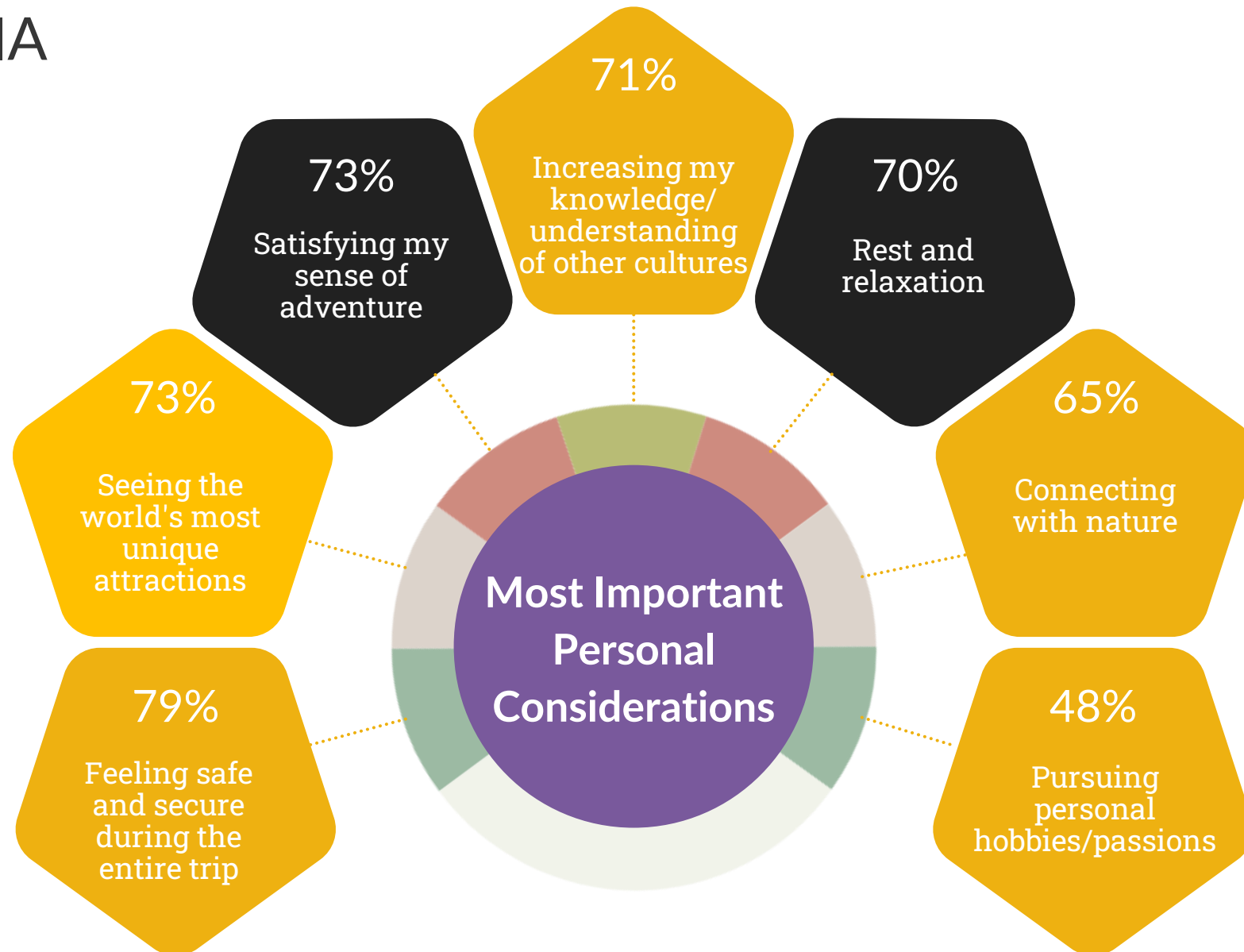
0.5

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

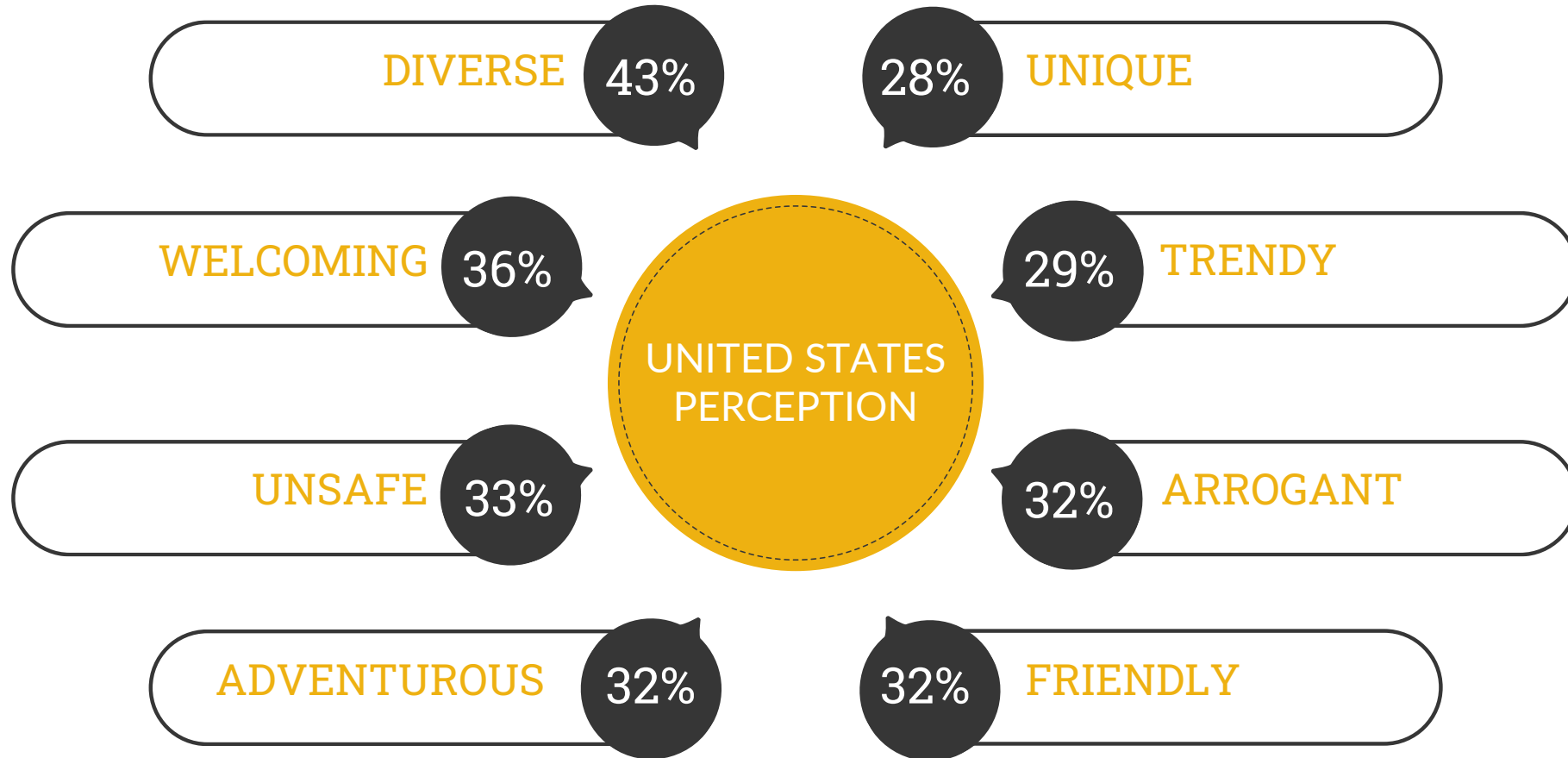
Most Discouraging From Visiting a Destination

- 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



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)

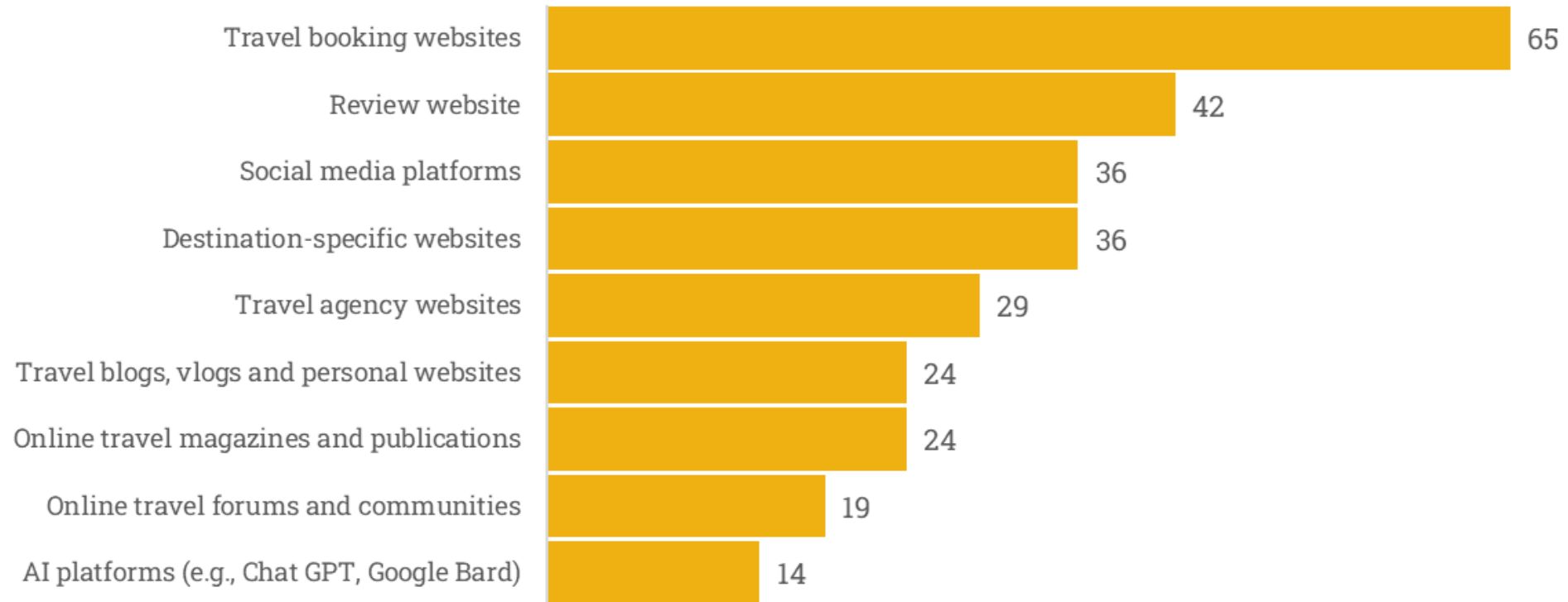
Sources of Information for Destination Selection (%)



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 %

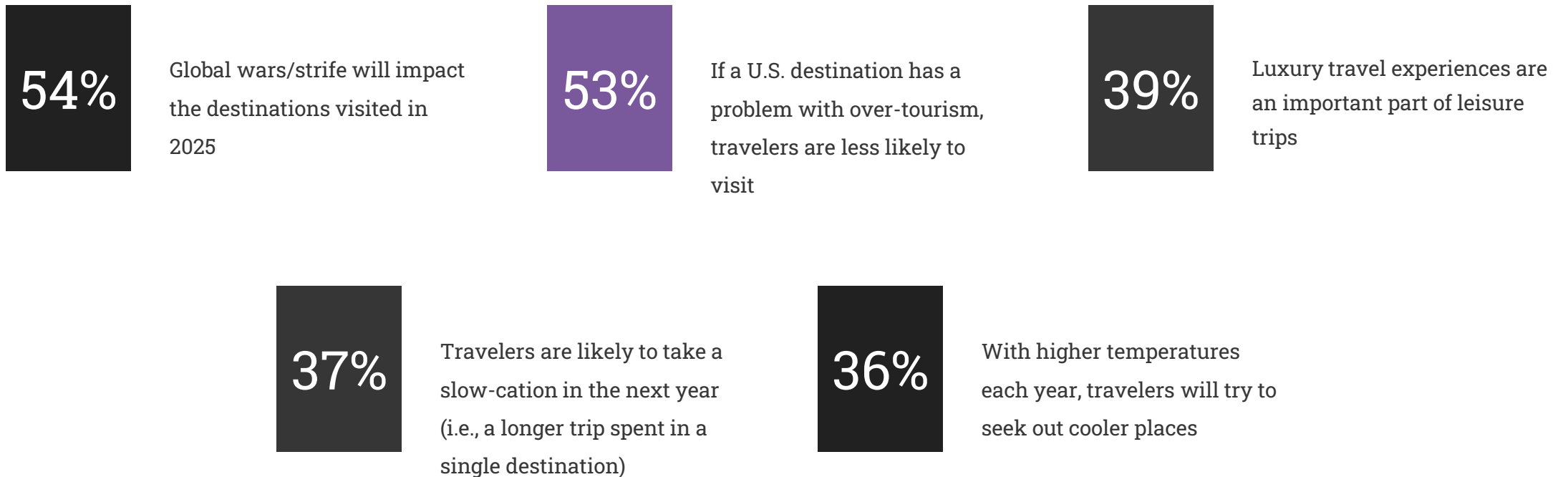
Note: Australian visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

AUSTRALIA

Likelihood of how 2025 will evolve:

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



INDIA



POPULATION
2024

1.4B

REAL GDP
GROWTH
2025 PROJECTION

6.5%

CURRENCY
RATE
INDIAN RUPEE
2024

83.68

INFLATION
RATE
2025 PROJECTION

4.1%

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

27.1%

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

59.4%

INDIA

85%

Likelihood to Visit Travel South
in the next Five Years

Note: Indian visitors who are Likely to Travel Internationally

Most Important Content For Destination Decisions:



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

Source: Future Partners (2025)

INDIA

Recall of “Buzz”: Travel South Destinations

71%

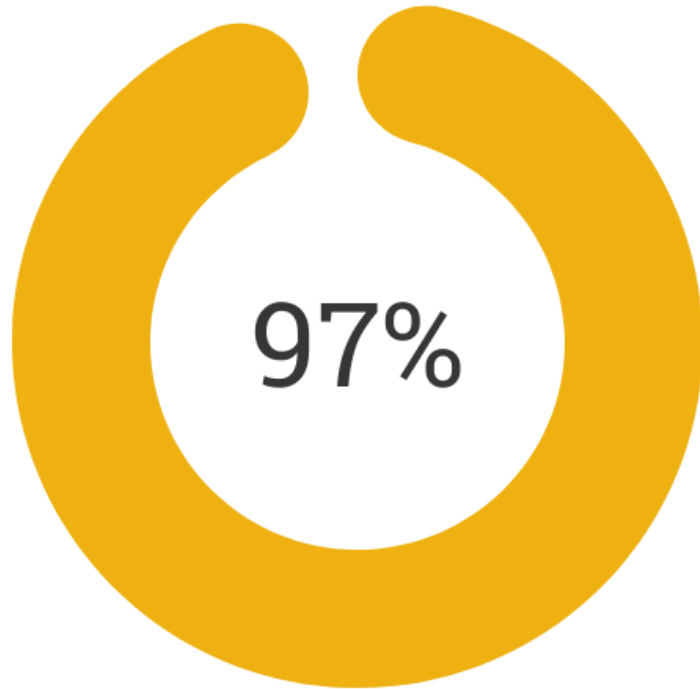
Overall, **one-third of international travelers** reported seeing a travel-related advertisement or other promotion about Southern destinations in the past year.



Note: Indian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

INDIA



APPEAL

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



FAMILIARITY

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

INDIA



1 Trip

50%

2 Trips

21%

3-4 Trips

14%

5+ Trips

15%

3.0

Average Number of Leisure International Trips

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

Source: Brand USA (Aug. 2024)

INDIA



1+ Trips

72%

1 Trip

40%

2 Trips

12%

3+ Trips

21%

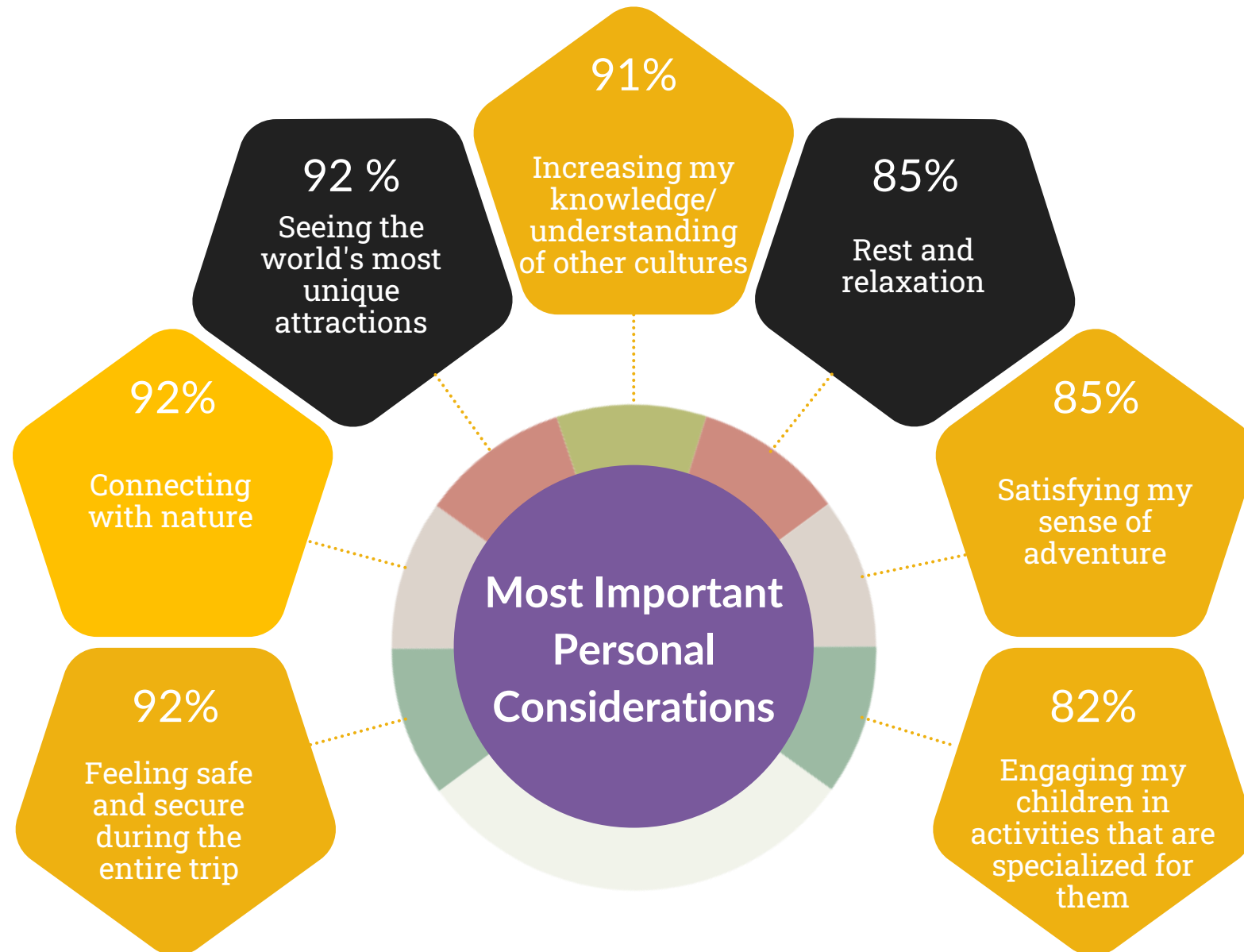
2.5

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

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

Source: Brand USA (Aug. 2024)

INDIA



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

Source: Brand USA (Aug. 2024)

INDIA

Most Important When Choosing a Destination

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

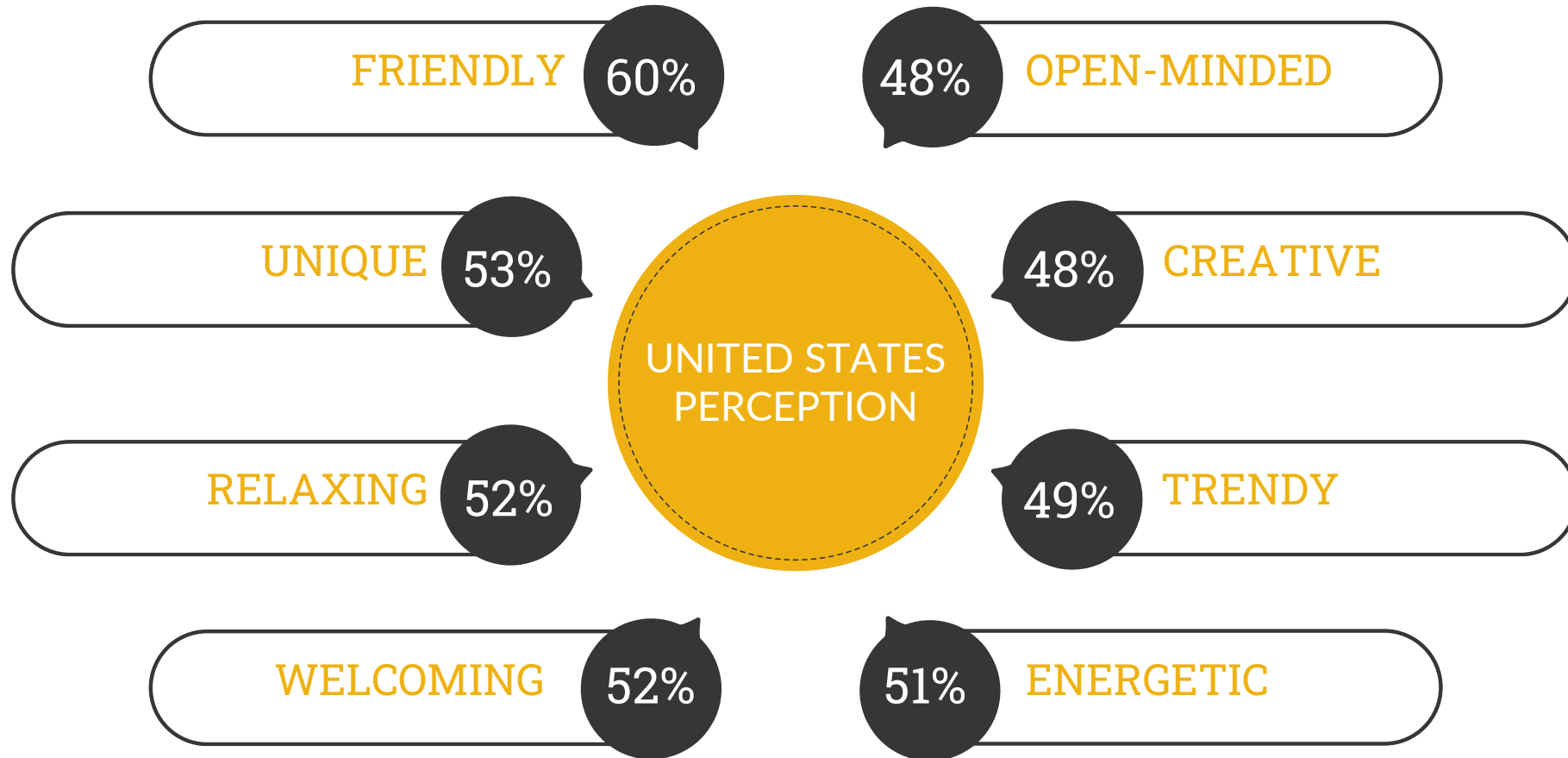
Most Discouraging From Visiting a Destination

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

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

Source: Brand USA (Aug. 2024)

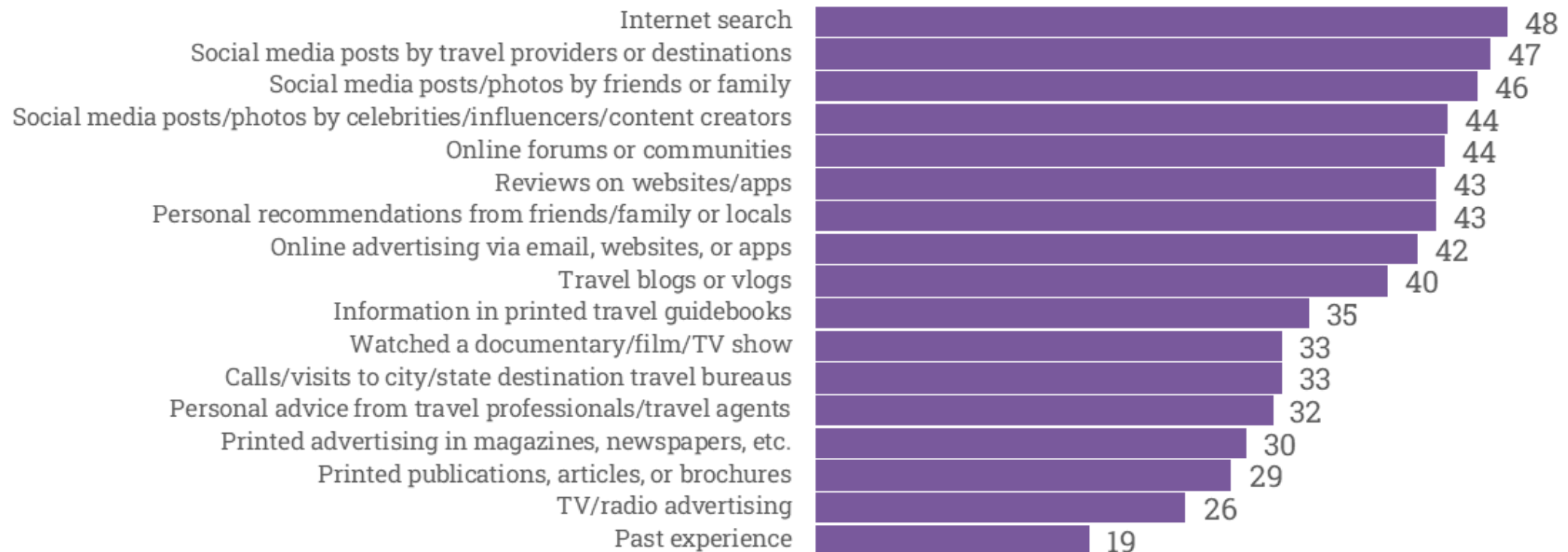
INDIA



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

Source: Brand USA (Aug. 2024)

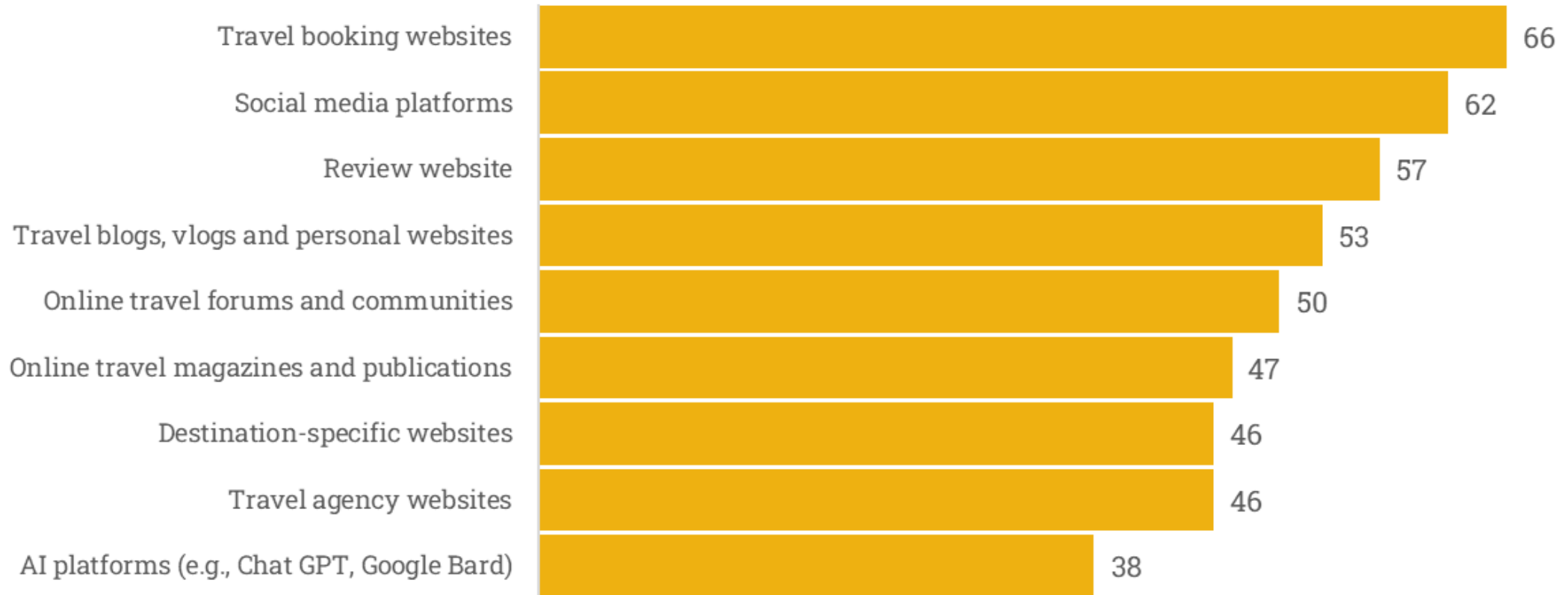
Sources of Information for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

Websites Used for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

Social Media Participation

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

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

Source: Brand USA (Aug. 2024)

INDIA

Likelihood of how 2025 will evolve:

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

73%

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

73%

Luxury travel experiences are an important part of leisure trips

72%

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

70%

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

69%

Global wars/strife will impact the destinations visited in 2025

Resources



Market Profiles

Global Partner Program

