

TRAVEL · SOUTH  USA

VIRGINIA

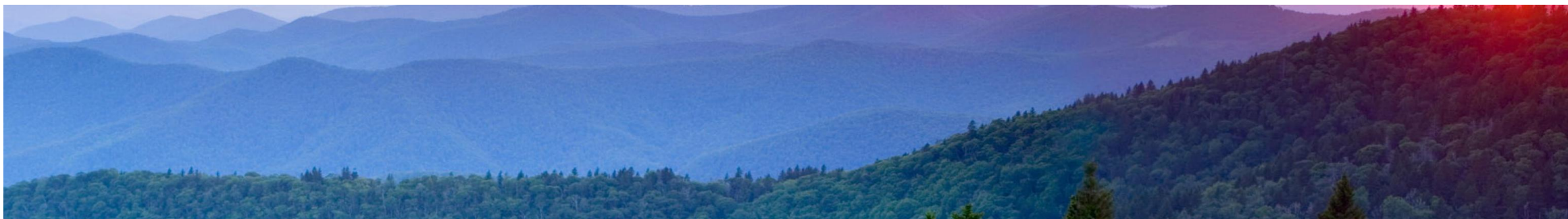
VIRGINIA  
IS FOR  
LO  ERS®

INTERNATIONAL MARKETS

April 2025

# International Travel

1. The U.S. travel landscape is facing near-term challenges driven by uncertainty, geopolitical tensions, trade policy shocks and immigration
  - ❑ Trade shocks and immigration enforcement are weakening U.S. national competitiveness in the short term
  - ❑ Rising negative sentiment among leisure and business travelers is posing a risk to travel demand
2. Steep Decline in Inbound International Travel forecasted for 2025
  - U.S.
    - ❑ 9.4% drop in international arrivals
    - ❑ \$9.0B loss in visitor spending, with Canada accounting for ~\$3.4B
  - Travel South
    - ❑ 11% drop in international arrivals
    - ❑ \$421M loss in visitor spending, with Canada accounting for ~\$250M



*Deeper Dive reports, compiled by **Esra Calvert**, utilize data from Travel South's primary data affiliates, with the TSUSA Global Partner Program, Brand USA, Tourism Economics, Future Partners and secondary data to provide a multifaceted view of the markets.*

## **Visitor Economy**

Overview of Historic & Forecast Visitation and Spending by Tourism Economics

## **Flights**

Flights from the Largest Airport

## **Exports (Goods)**

Exports Market snapshot by the Office of Trade and Economic Analysis

## **International Students**

International Student Survey Results from Open Doors

## **Visitor Perception**

Perception of International Visitors who are likely to travel to the U.S. or a Travel South destination by Brand USA and Future Partners

## **Resources**

Links to Market Profiles, along with other Travel South resources

# Virginia's International Visitor Economy



## *Highlighting the State's Global Interconnectivity*



### Outlook

- By 2025, forecasted to reach **\$1.3 billion** and **823,000 visitors**

### US Inbound Travel Rebound – Key Markets

- International inbound spending is expected to decline by 4% from 2024, a 26% 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, India, DACH Region, South Korea, China, Nordics, Brazil, Israel and France**, accounting for **60%** of the state's international tourism expenditures

### Exports by Market

- **5,000 companies** exported **\$22 billion** worth of goods
- Exports to **Canada, China, India and Germany** are among the top origin markets of visitation
- **India and China** account for half of the international student population
- **89%** of visits are non-business related

# Virginia's International Visitor Economy

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

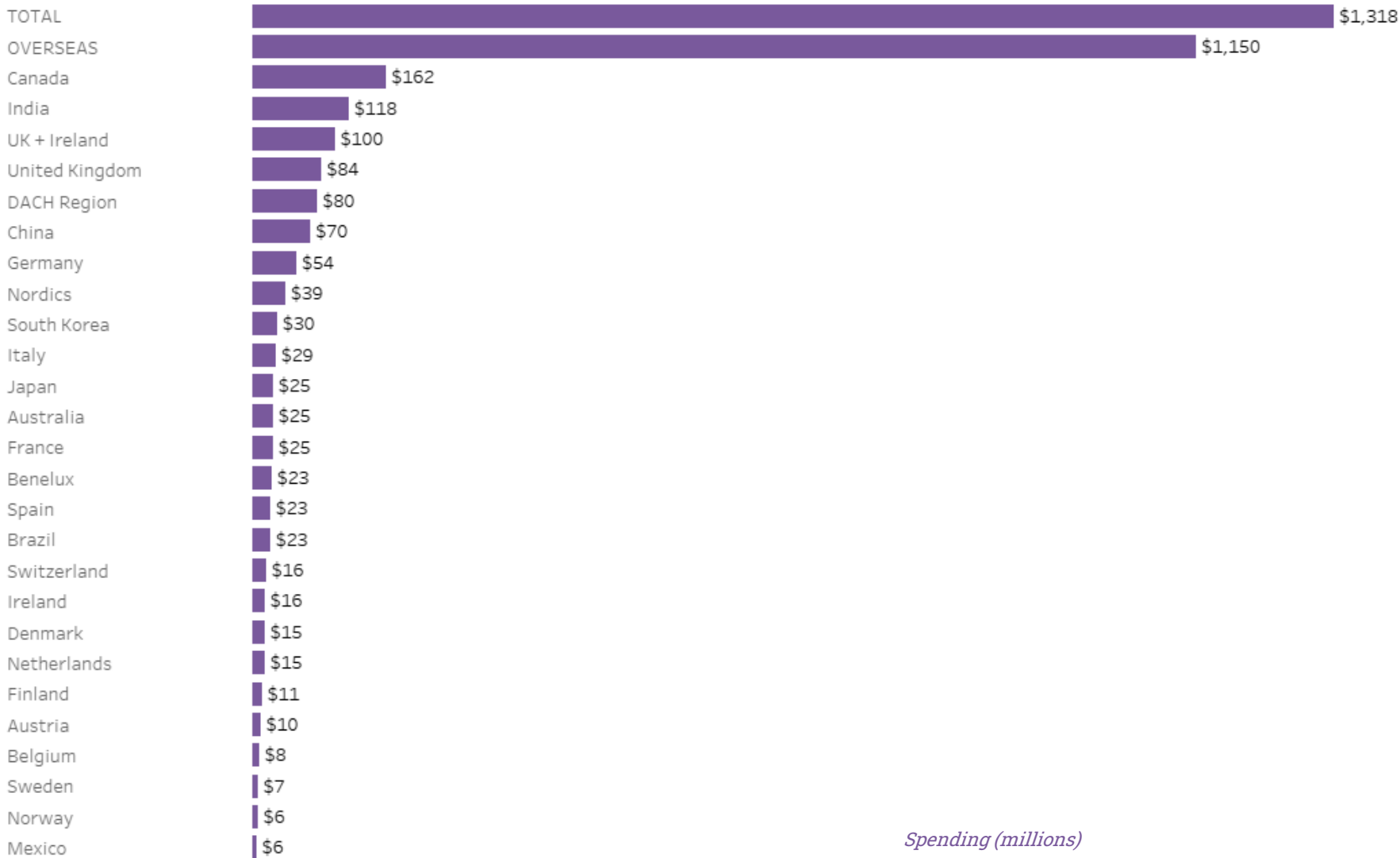
- Virginia's investment in regional marketing amplifies the state's brand internationally and targets high-value travelers, enhancing regional economies and diversifying the visitor economy.
- Collaborative marketing efforts under Travel South USA (TSUSA) further strengthen Virginia's strategic advantage.
- The Washington-Dulles Airport connects the Commonwealth to 61 international destinations with easy access to the state.
- Proximity to neighboring states— Kentucky, Maryland, North Carolina, Tennessee, and West Virginia —attracts international travelers interested in the Travel South's natural beauty, cultural heritage, and connectivity, thus enriching Virginia's tourism landscape.



# Visitor Economy

*April 15, 2025*

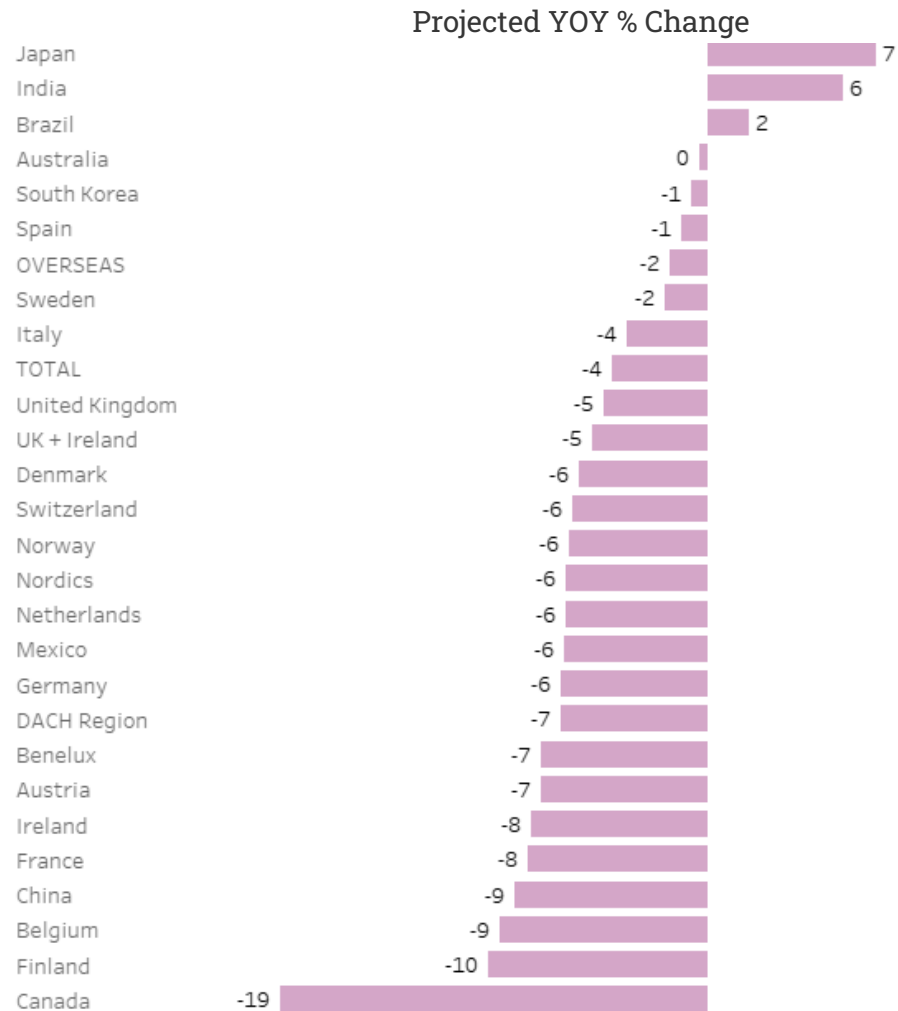
# 2025 Outlook: Visitor Spending by Key Markets



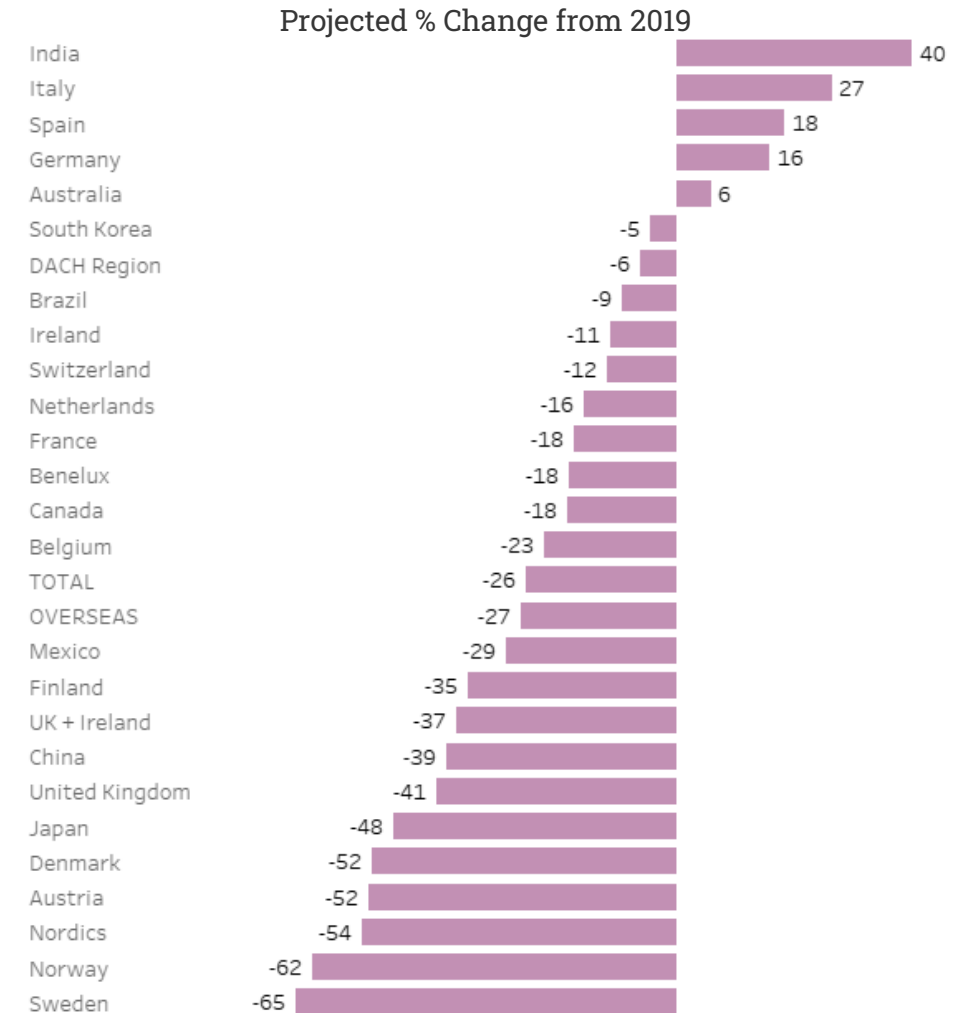
Spending (millions)



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



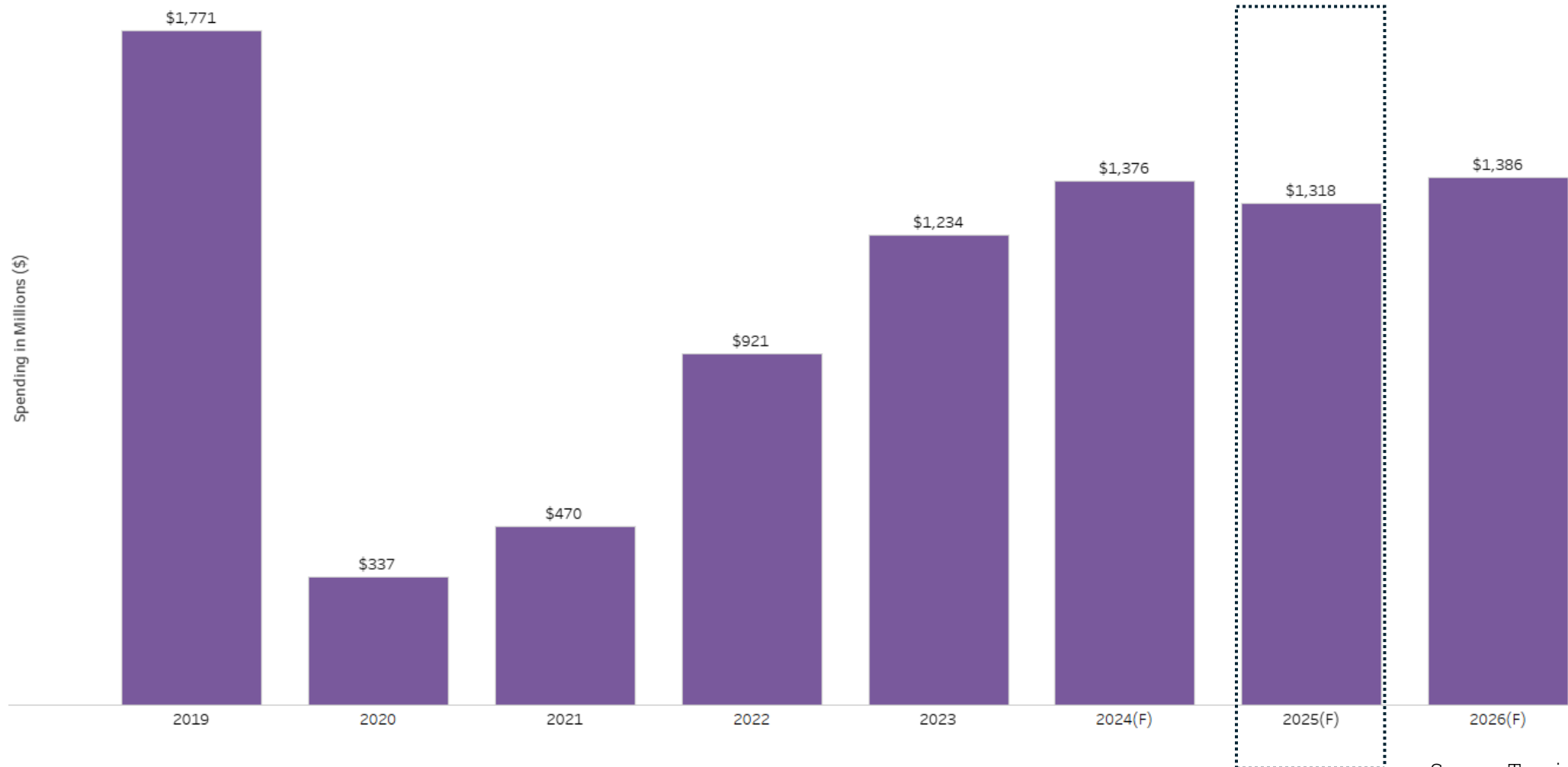
# 2019 Baseline Comparison





# VIRGINIA

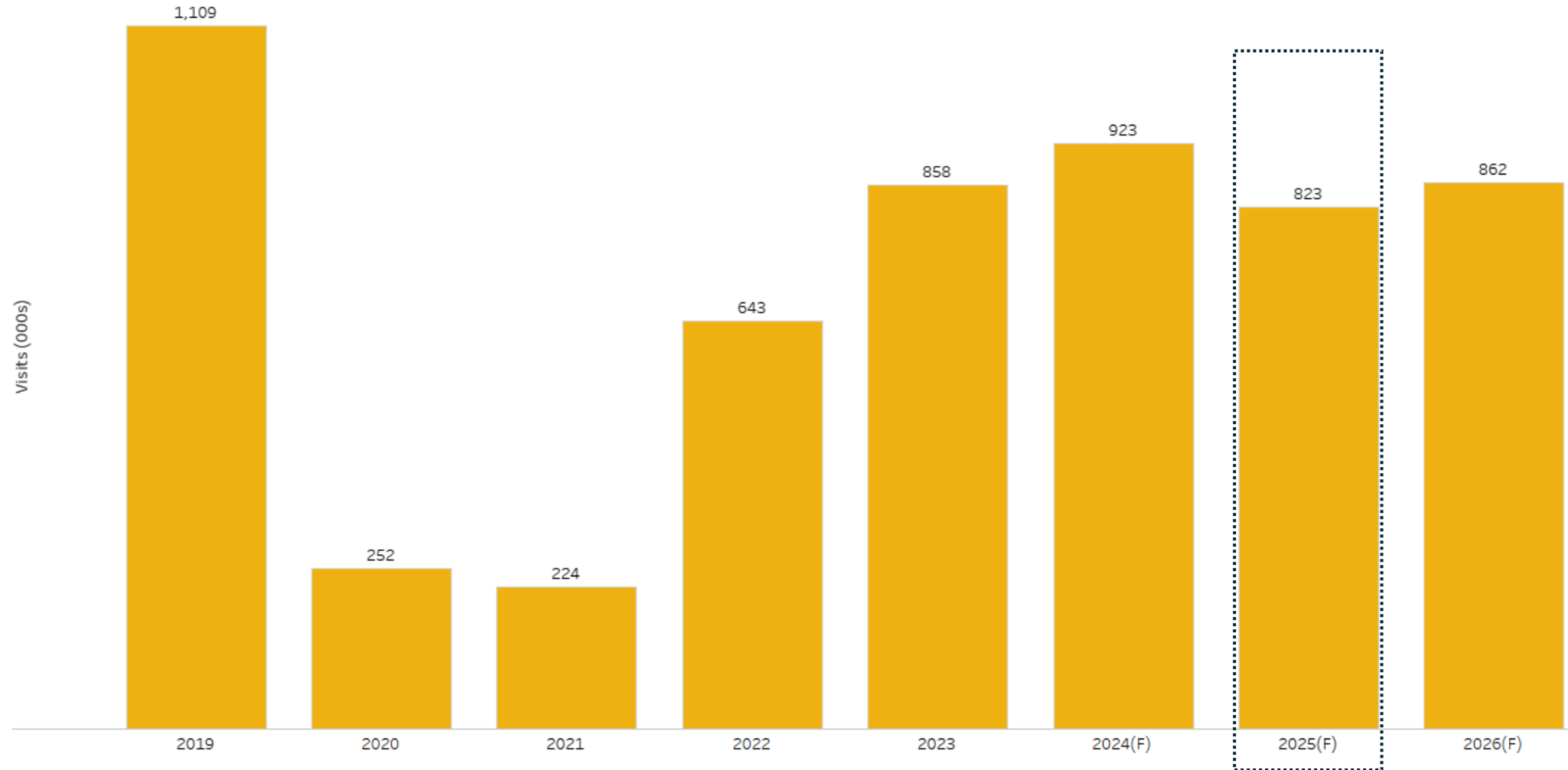
2025 Spending Outlook: Down 4% from 2024, still below 2019



# VIRGINIA



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



# VIRGINIA

## \$1.3B Projected Spend and 823,000 Visits in 2025, down 4% and 11% from 2024

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

Market	Spending (\$M)	≡	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
TOTAL	1,318		-4	823	-11	-26	-26
OVERSEAS	1,150		-2	499	-4	-27	-17
Canada	162		-19	306	-21	-18	-37
India	118		6	71	3	40	103
UK + Ireland	100		-5	60	-6	-37	-38
United Kingdom	84		-5	53	-6	-41	-40
DACH Region	80		-7	46	-8	-6	-9
China	70		-9	21	-8	-39	-47
Germany	54		-6	37	-8	16	-3
Turkiye	52		5	6	2	74	-32
Nordics	39		-6	13	-6	-54	-50
Philippines	38		3	12	3	10	21
Israel	37		12	11	7	-42	11
United Arab Emirates	36		2	3	4	-29	-36
South Africa	31		0	3	-2	-7	-27
South Korea	30		-1	15	-2	-5	-28
Italy	29		-4	16	-5	27	-7
Japan	25		7	14	7	-48	-49
Australia	25		0	10	-1	6	-29
France	25		-8	18	-9	-18	-33
Benelux	23		-7	14	-8	-18	-13
Spain	23		-1	11	-5	18	-19
Brazil	23		2	7	-3	-9	-25

# VIRGINIA



## \$1.3B Projected Spend and 823,000 Visits in 2025 (cont.)

Market	Spending (\$M)	🏠	YOY Spend % Change	Visits (000s)	YOY Visits % Change	% Change from 2019 Spend	% Change from 2019 Visits
Singapore	21		4	5	4	-6	-14
Poland	17		3	6	-4	-10	42
Switzerland	16		-6	5	-6	-12	-32
Egypt	16		-7	2	-6	-62	-41
Ireland	16		-8	8	-7	-11	-14
Denmark	15		-6	4	-8	-52	-33
Netherlands	15		-6	10	-8	-16	-11
Morocco	13		-6	2	-5	6	45
Finland	11		-10	2	-6	-35	-44
Ukraine	10		7	1	5	4	-52
Austria	10		-7	3	-8	-52	-19
Portugal	9		-3	3	-5	-32	3
Belgium	8		-9	4	-8	-23	-18
Thailand	8		0	1	2	-32	-46
Taiwan	8		17	5	10	-34	62
Czech Republic	7		-8	2	-9	-27	-14
Sweden	7		-2	4	-5	-65	-61
Greece	7		-3	1	-5	-31	-22
Norway	6		-6	2	-4	-62	-48
Mexico	6		-6	18	-8	-29	0
Vietnam	5		3	2	3	-17	228
Argentina	5		6	3	2	-12	-13
Indonesia	4		-6	1	-3	18	76
Hungary	4		0	1	-3	-31	16
Malaysia	3		2	1	1	-14	57
Russia	3		9	1	9	-78	-79
Hong Kong	3		-2	1	0	-60	-27
Iran	3		-61	0	-60	-28	-42
Saudi Arabia	2		-1	2	0	-55	-67
Bulgaria	2		6	1	1	-22	34
Croatia	1		-3	1	-1	95	114

Source: Tourism Economics | 04.15.2025

# VIRGINIA

## Visitor Spending 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Spending (\$M)	TOTAL	\$1,771	\$337	\$470	\$921	\$1,234	\$1,376	\$1,318
	OVERSEAS	\$1,564	\$293	\$446	\$791	\$1,026	\$1,170	\$1,150
	Canada	\$199	\$42	\$20	\$125	\$203	\$200	\$162
	India	\$84	\$19	\$23	\$84	\$91	\$111	\$118
	UK + Ireland	\$160	\$20	\$15	\$94	\$102	\$106	\$100
	DACH Region	\$85	\$11	\$11	\$64	\$83	\$85	\$80
	China	\$116	\$29	\$25	\$16	\$37	\$77	\$70
	Nordics	\$85	\$13	\$9	\$41	\$43	\$42	\$39
	South Korea	\$31	\$8	\$13	\$14	\$24	\$30	\$30
	Italy	\$23	\$3	\$5	\$19	\$27	\$30	\$29
	Japan	\$48	\$8	\$4	\$9	\$22	\$23	\$25
	Australia	\$24	\$4	\$1	\$13	\$20	\$25	\$25
	France	\$30	\$4	\$6	\$16	\$26	\$27	\$25
	Benelux	\$28	\$4	\$5	\$18	\$23	\$25	\$23
	Spain	\$19	\$2	\$4	\$19	\$22	\$23	\$23
	Brazil	\$25	\$5	\$5	\$14	\$18	\$22	\$23
	Mexico	\$8	\$2	\$3	\$5	\$5	\$6	\$6

# VIRGINIA



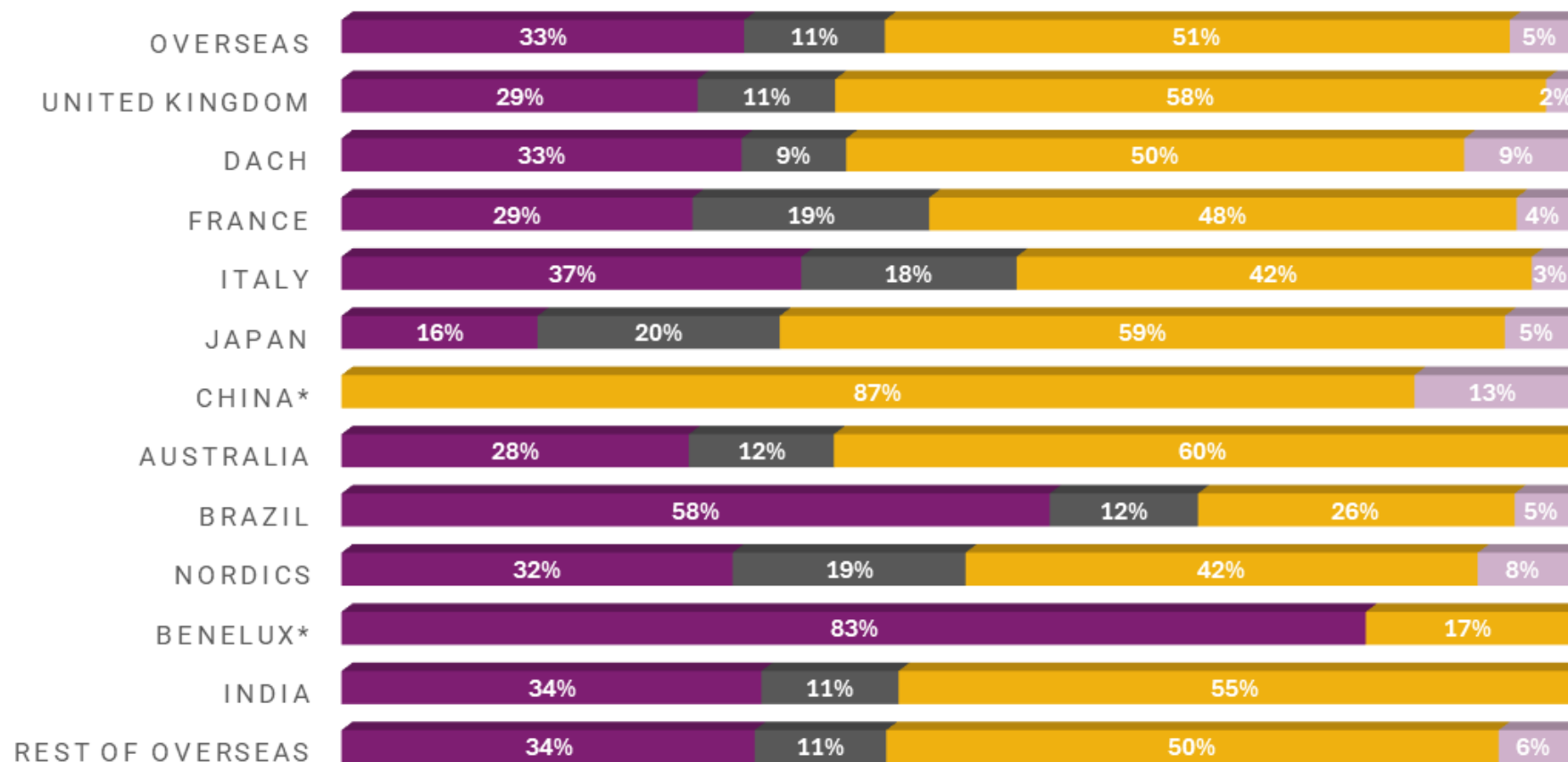
## Visits 2019-2025F

		2019	2020	2021	2022	2023	2024(F)	2025(F)
Visits (000s)	TOTAL	1,109	252	224	643	858	923	823
	OVERSEAS	601	132	159	359	460	517	499
	Canada	490	113	56	270	381	386	306
	India	35	9	10	45	53	69	71
	UK + Ireland	97	16	12	58	62	64	60
	DACH Region	51	9	7	38	48	50	46
	China	40	6	3	6	15	23	21
	Mexico	18	7	9	15	17	20	18
	France	27	6	5	13	20	20	18
	Italy	17	3	4	11	15	17	16
	South Korea	21	6	3	8	14	15	15
	Benelux	16	5	3	12	15	15	14
	Japan	28	7	2	5	12	13	14
	Nordics	25	5	3	11	13	14	13
	Spain	14	3	4	11	12	12	11
	Australia	13	2	1	6	9	10	10
	Brazil	9	2	2	4	6	7	7

# VIRGINIA

## VIRGINIA: Purpose of Trip

Leisure Business VFR Other



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



# Flights

## Washington-Dulles offers nonstop flights to 61 Destinations



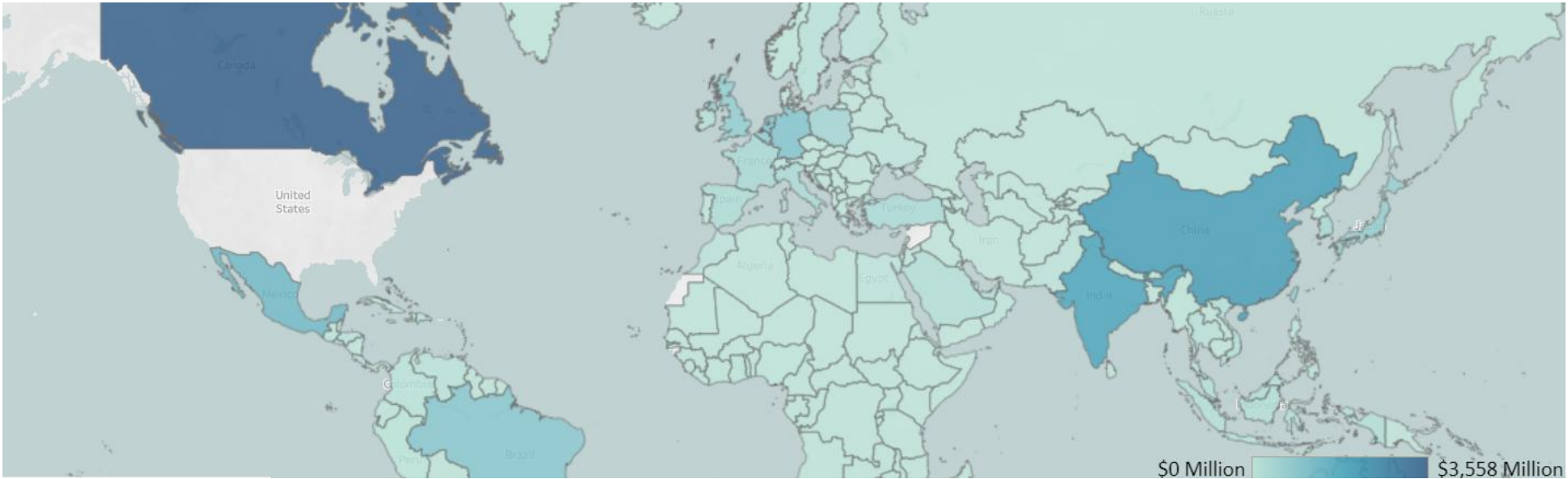
Source: <https://www.flydulles.com/nonstop-destinations>

### Non-Stop Flights to Key Markets

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Calgary, Montreal, Ottawa, Toronto, Vancouver  
Beijing  
Dublin, Edinburg London  
Delhi  
Frankfurt, Munich, Vienna, Geneva, Zurich  
Copenhagen, Reykjavik  
Seoul  
Sao Paulo  
Tel Aviv  
Tokyo  
Brussels  
Barcelona, Madrid  
Lisbon  
Paris  
Rome

# Exports (Goods)



**EXPORTS IN GOODS**  
*2024*

**\$22 Billion**

**TOP COUNTRIES**

CANADA  
CHINA  
INDIA  
MEXICO  
GERMANY  
NETHERLANDS



### Goods Exports by Country

(in millions)

Partner	2024
World	\$21,780
Canada	\$3,371
China	\$1,464
India	\$1,405
Mexico	\$1,309
Germany	\$1,117
Netherlands	\$950
Brazil	\$879
Japan	\$725
Belgium	\$723
United Kingdom	\$656
Taiwan	\$651
Australia	\$547
Italy	\$434
South Korea	\$417
Turkey	\$374

EXPORTERS

5,169

Virginia companies exported goods in 2021

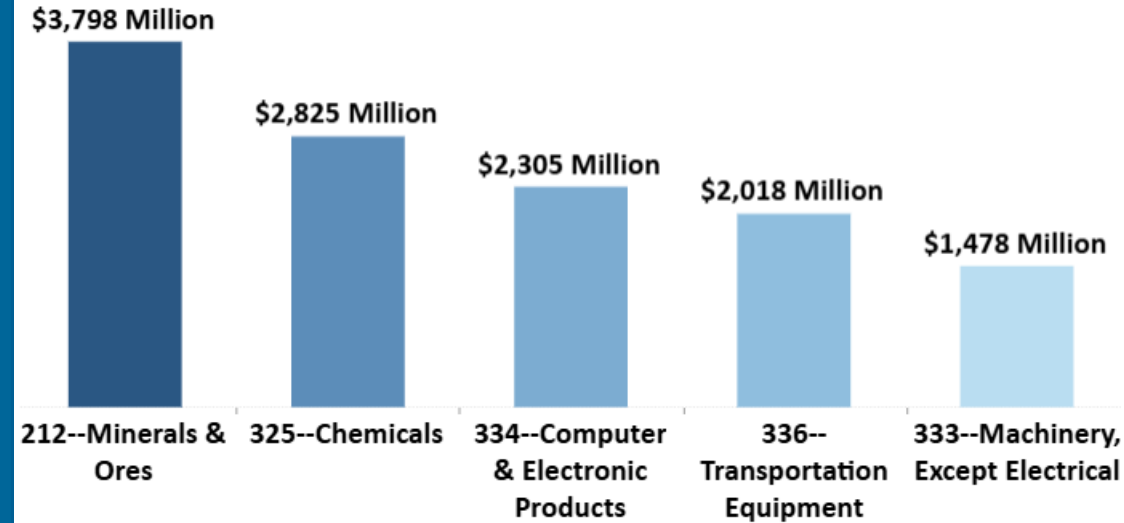
84%

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

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

TOP TRADE SECTORS

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



# International Students



# VIRGINIA

INTERNATIONAL  
STUDENTS  
*2022/23*

21,243

STUDENT-VISIT  
RATIO

2.2%

INDEXED  
STUDENT-VISIT  
RATIO  
U.S. = 100

207

# VIRGINIA

## INTERNATIONAL STUDENTS, 2023/24



**21,243**

International Students



**18**

Rank in the United States\*



**9.7**

% Change from  
Previous Year



**\$807,211,570**

Estimated International  
Student Expenditure\*\*

## LEADING PLACES OF ORIGIN

Place of Origin	% Total
India	<b>28.5</b>
China	<b>17.1</b>
South Korea	<b>4.7</b>
Saudi Arabia	<b>3.6</b>
Bangladesh	<b>3.0</b>

## LEADING INSTITUTIONS

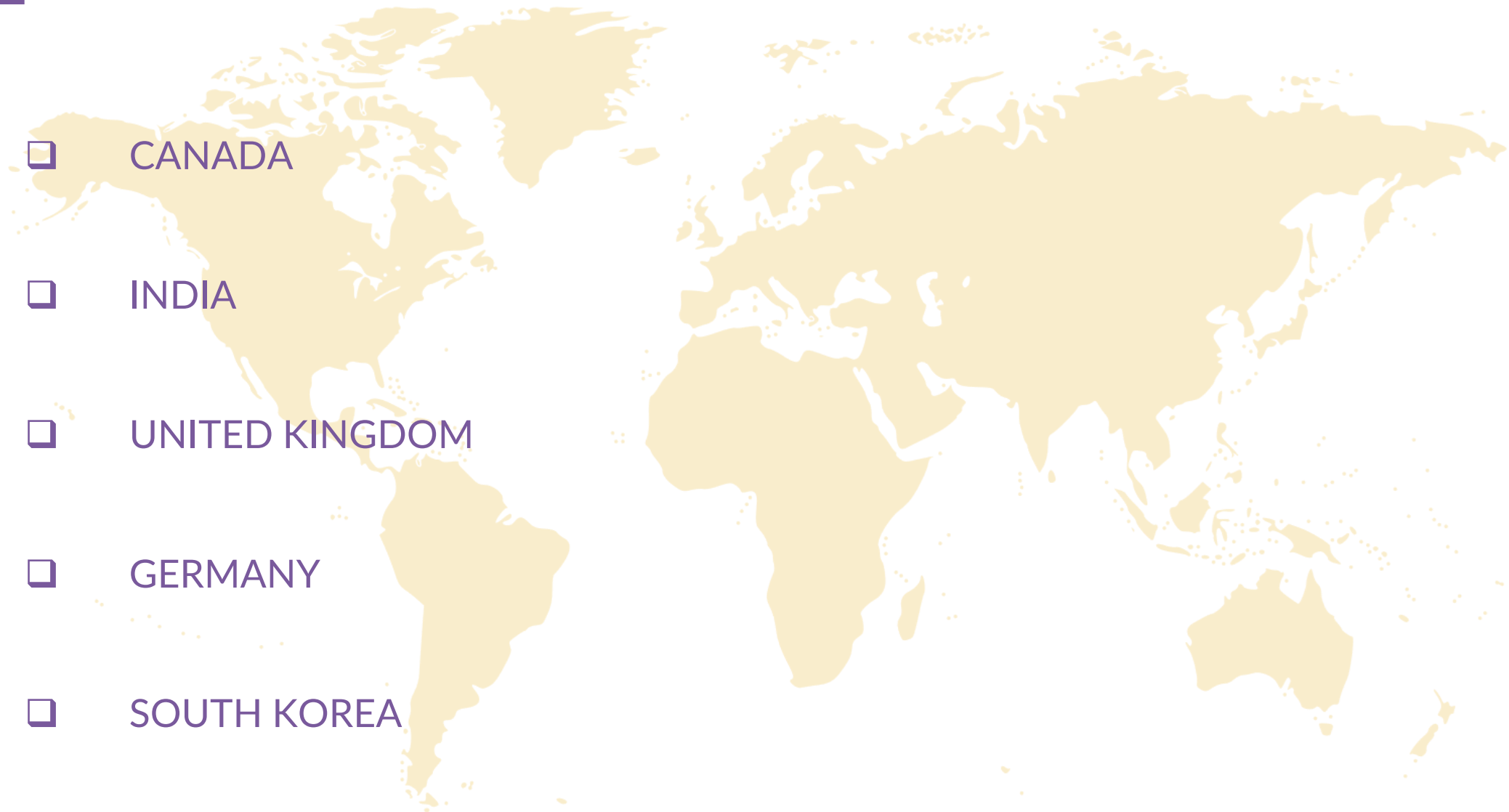
Institution	Total
George Mason University	<b>5,284</b>
Virginia Polytechnic Institute and State University	<b>5,160</b>
University of Virginia - Charlottesville	<b>2,997</b>
Northern Virginia Community College	<b>1,216</b>
Virginia Commonwealth University	<b>1,134</b>

# 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

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26%

## 1 Trip

---

17%

## 2 Trips

---

5%

## 3+ Trips

---

5%

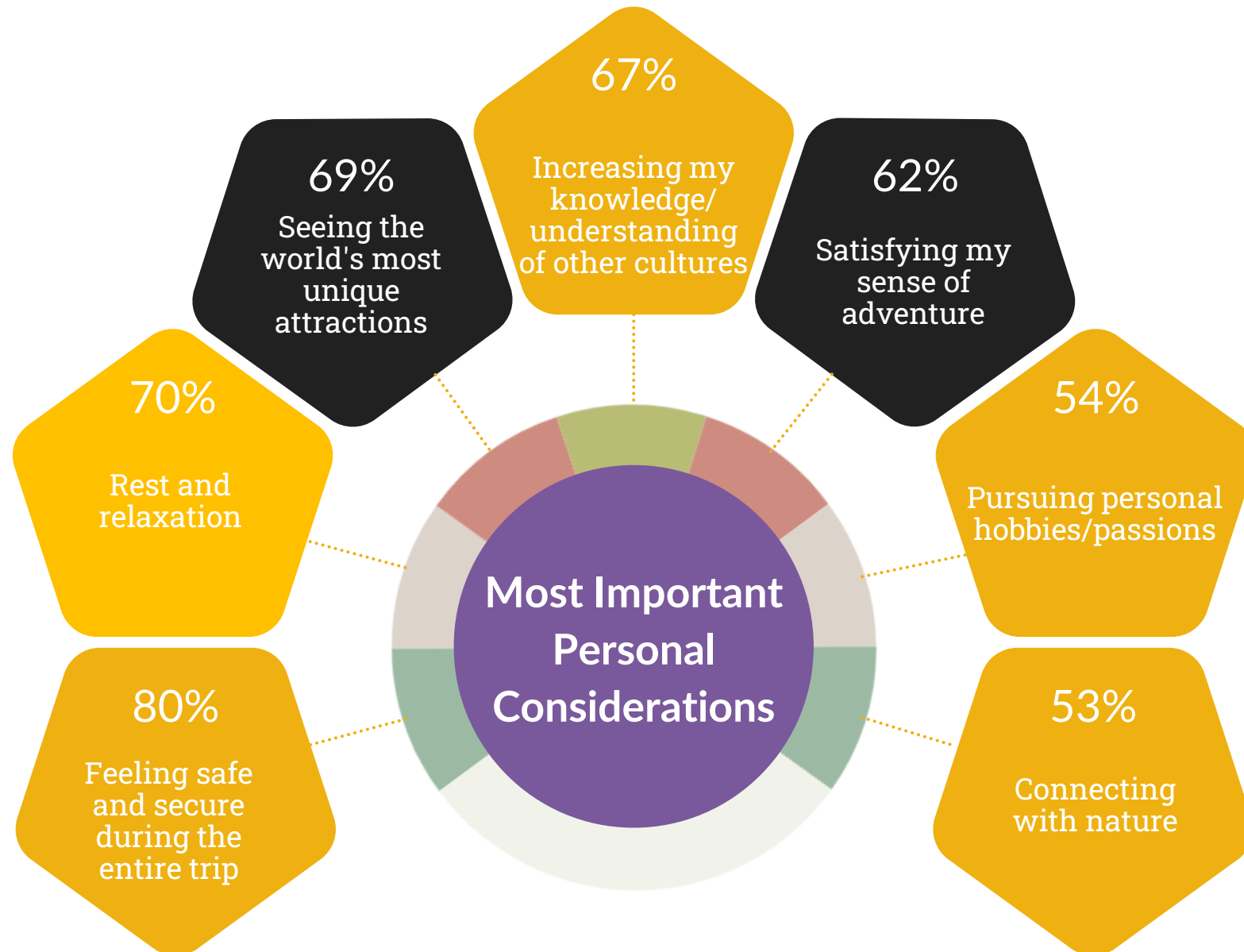
# 0.5

**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

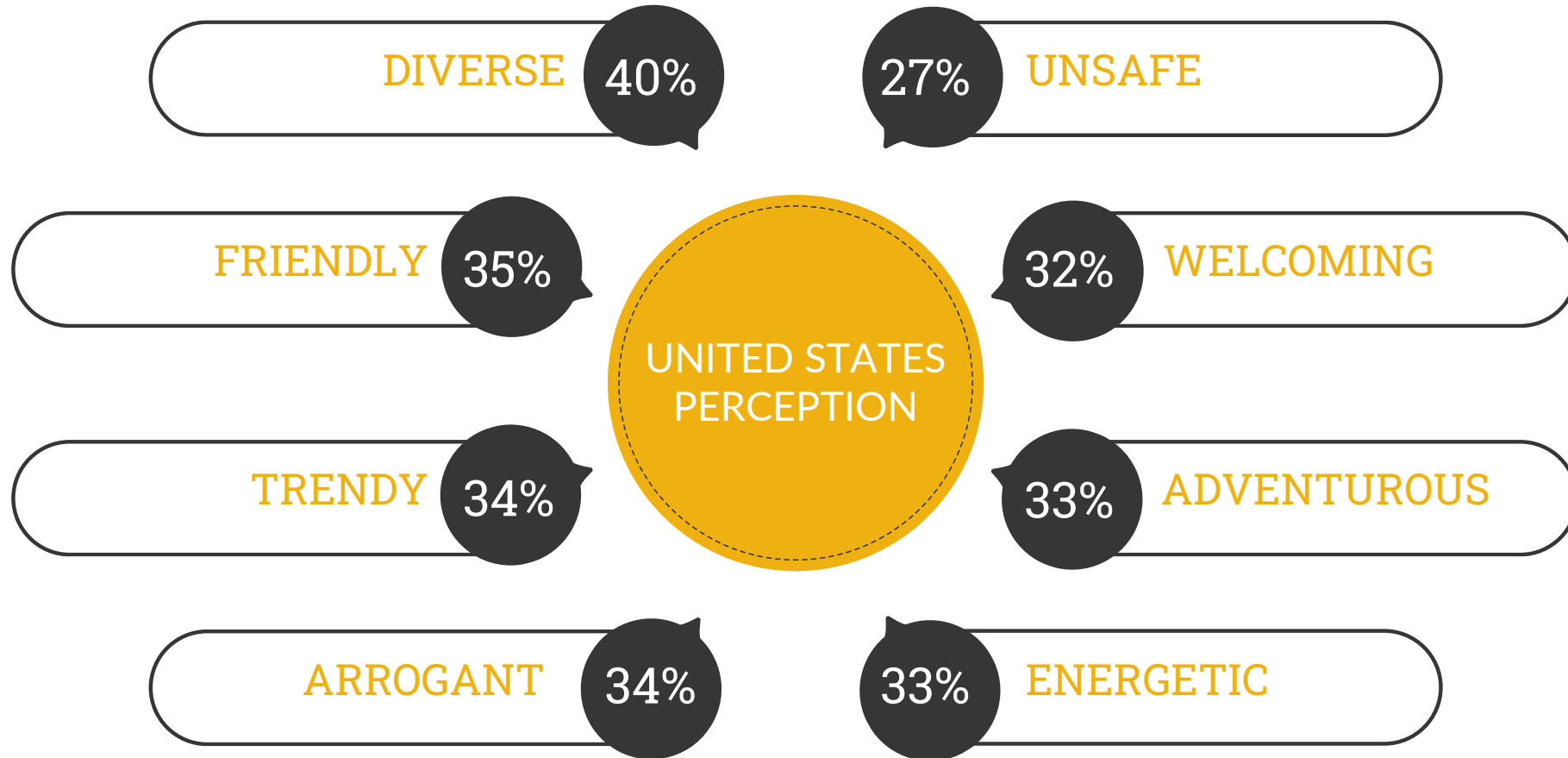
## Most Discouraging From Visiting a Destination

- 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)

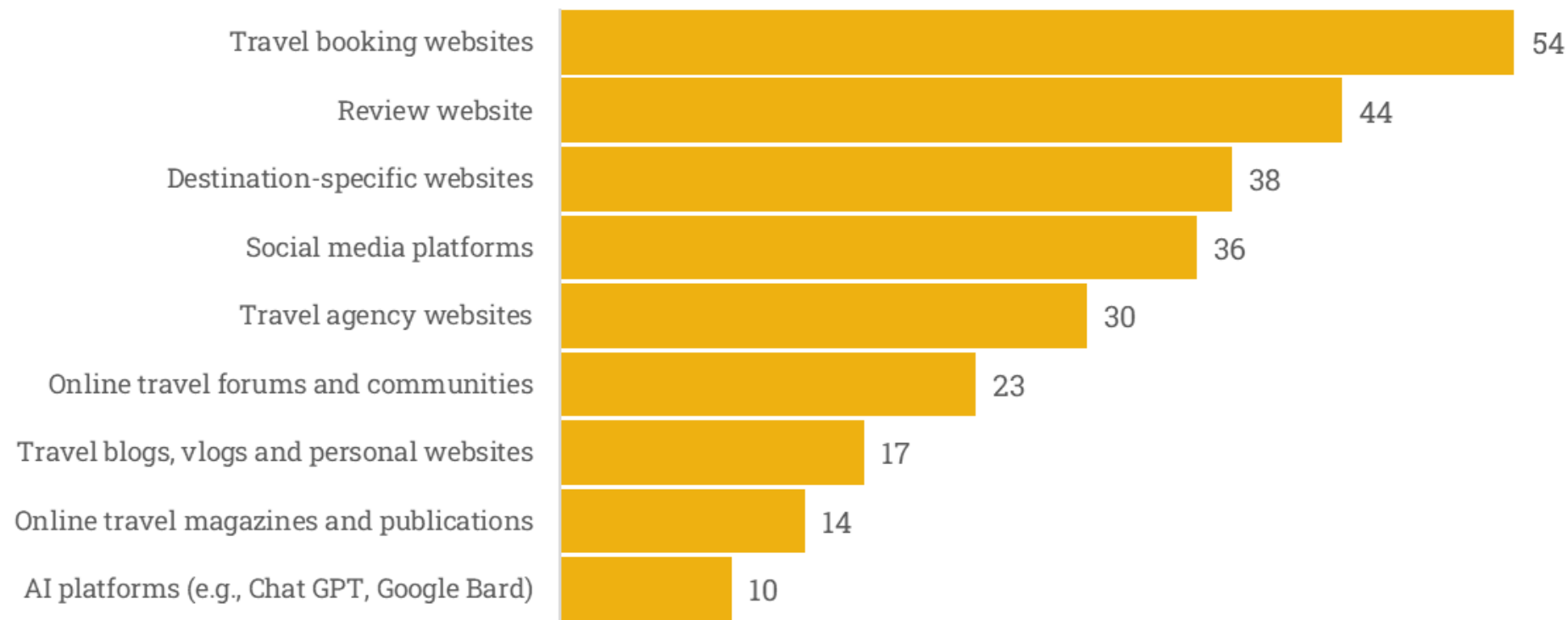
## Sources of Information for Destination Selection (%)



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

# INDIA



POPULATION  
*2024*

1.4B

REAL GDP  
GROWTH  
*2025 PROJECTION*

6.5%

CURRENCY  
RATE  
INDIAN RUPEE  
2024

83.68

INFLATION  
RATE  
*2025 PROJECTION*

4.1%

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

27.1%

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

59.4%

# INDIA

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# 85%

Likelihood to Visit Travel South  
in the next Five Years

Note: Indian visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:



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

Source: Future Partners (2025)

# INDIA

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Recall of “Buzz”: Travel South  
Destinations

71%

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

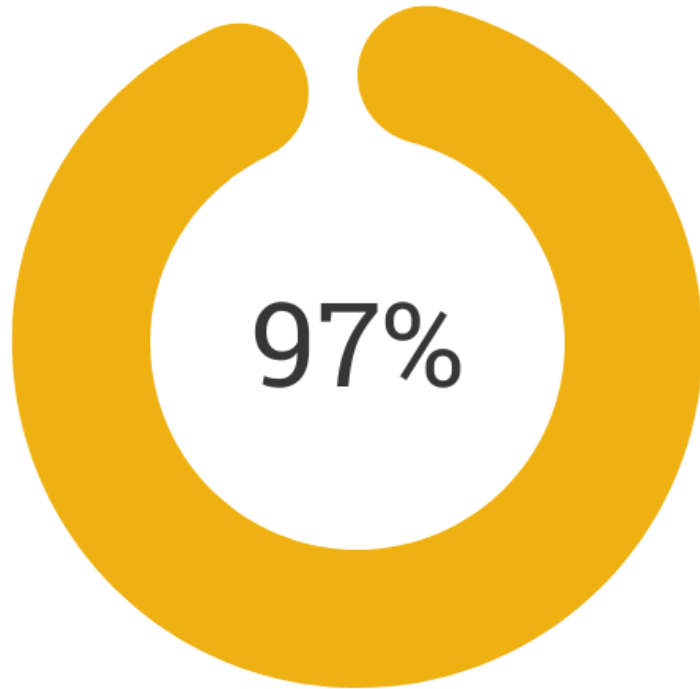


Note: Indian visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

# INDIA

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## APPEAL

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



## FAMILIARITY

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

# INDIA

---



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

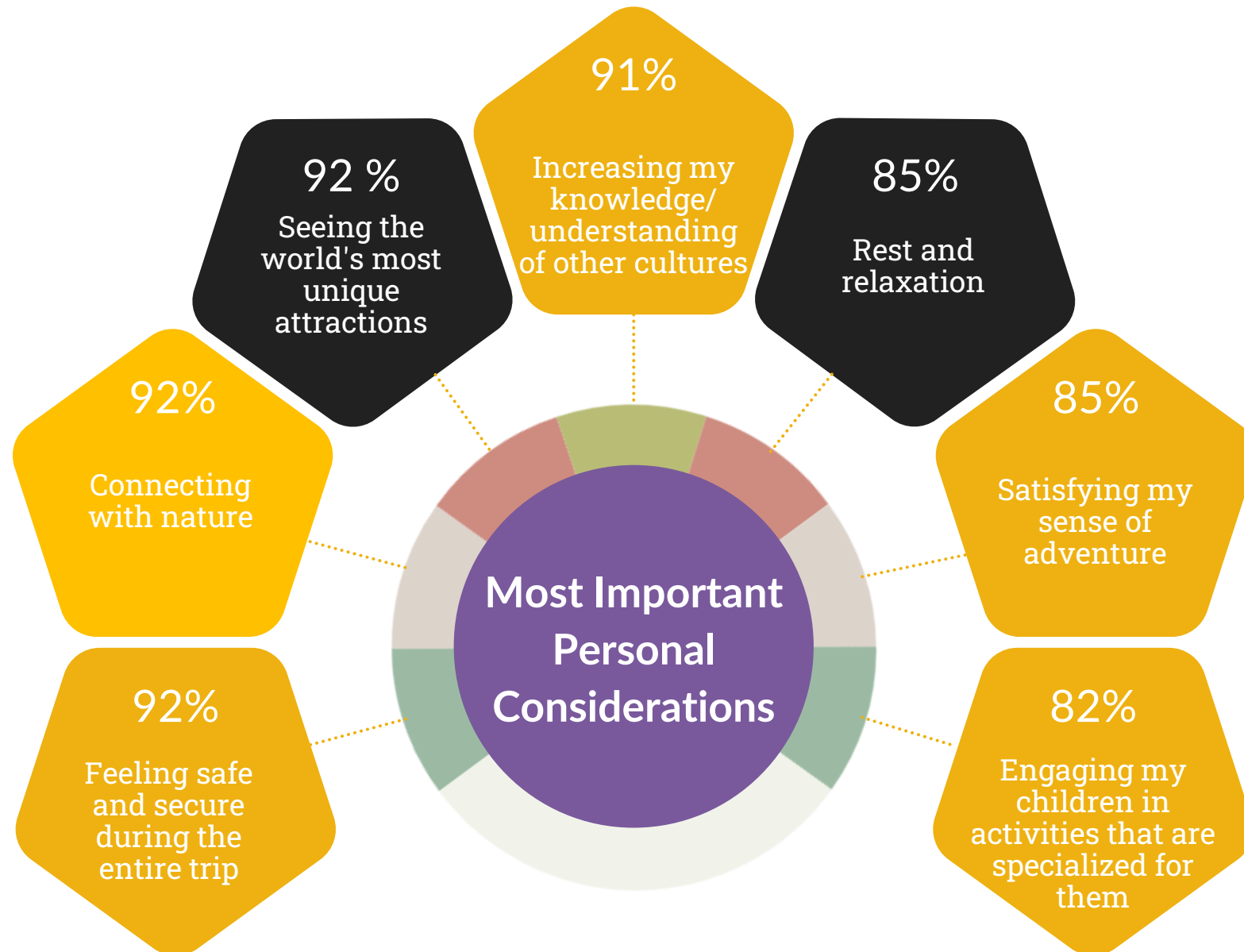
**Average Number of Bleisure Trips**  
% of Business Trips with a Leisure Extension

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

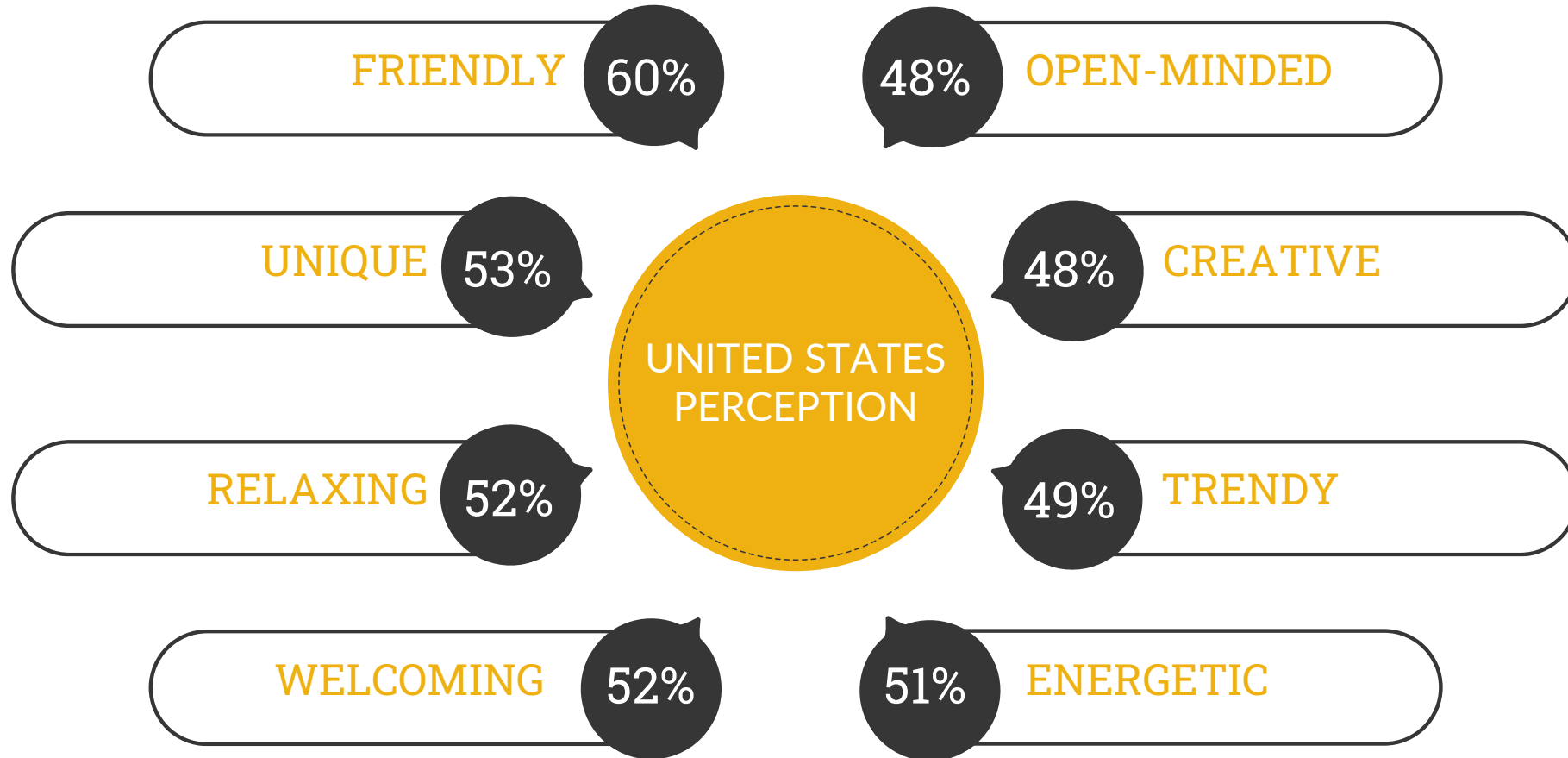
## Most Discouraging From Visiting a Destination

- 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)

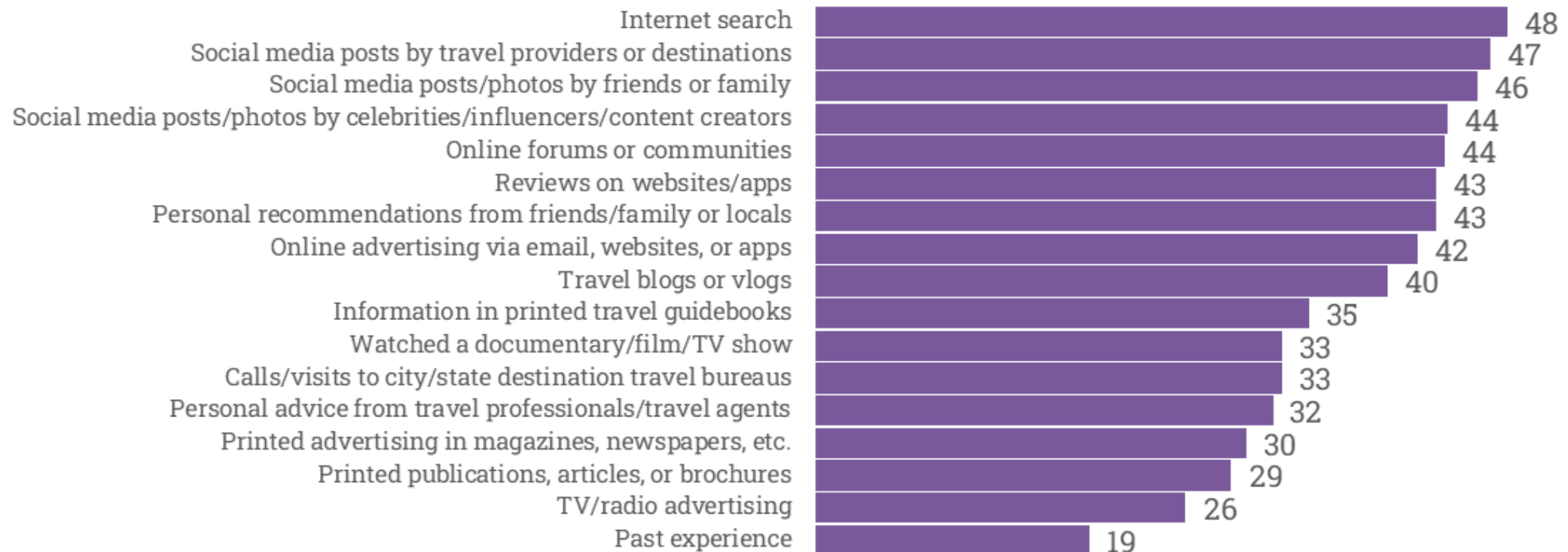
# INDIA



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)

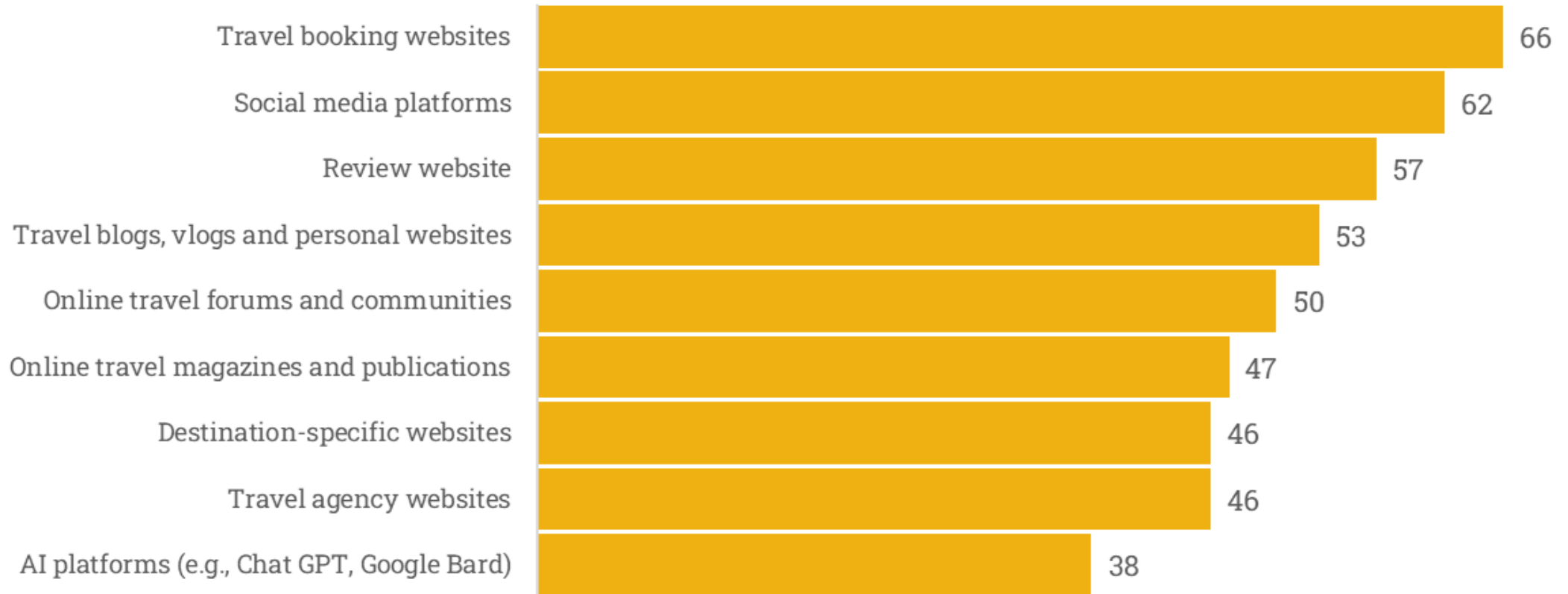
## Sources of Information for Destination Selection (%)



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

# 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%

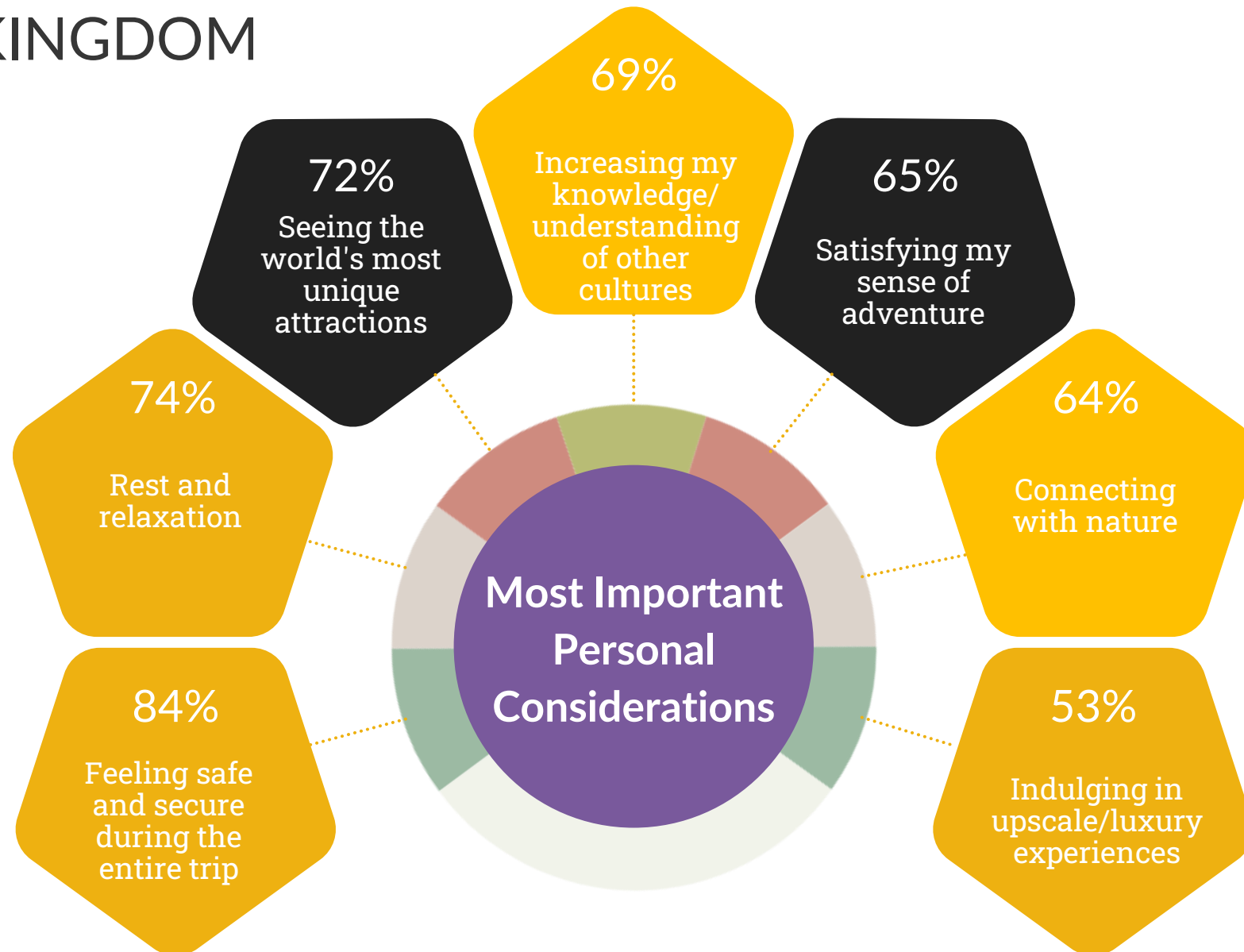
0.7

**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

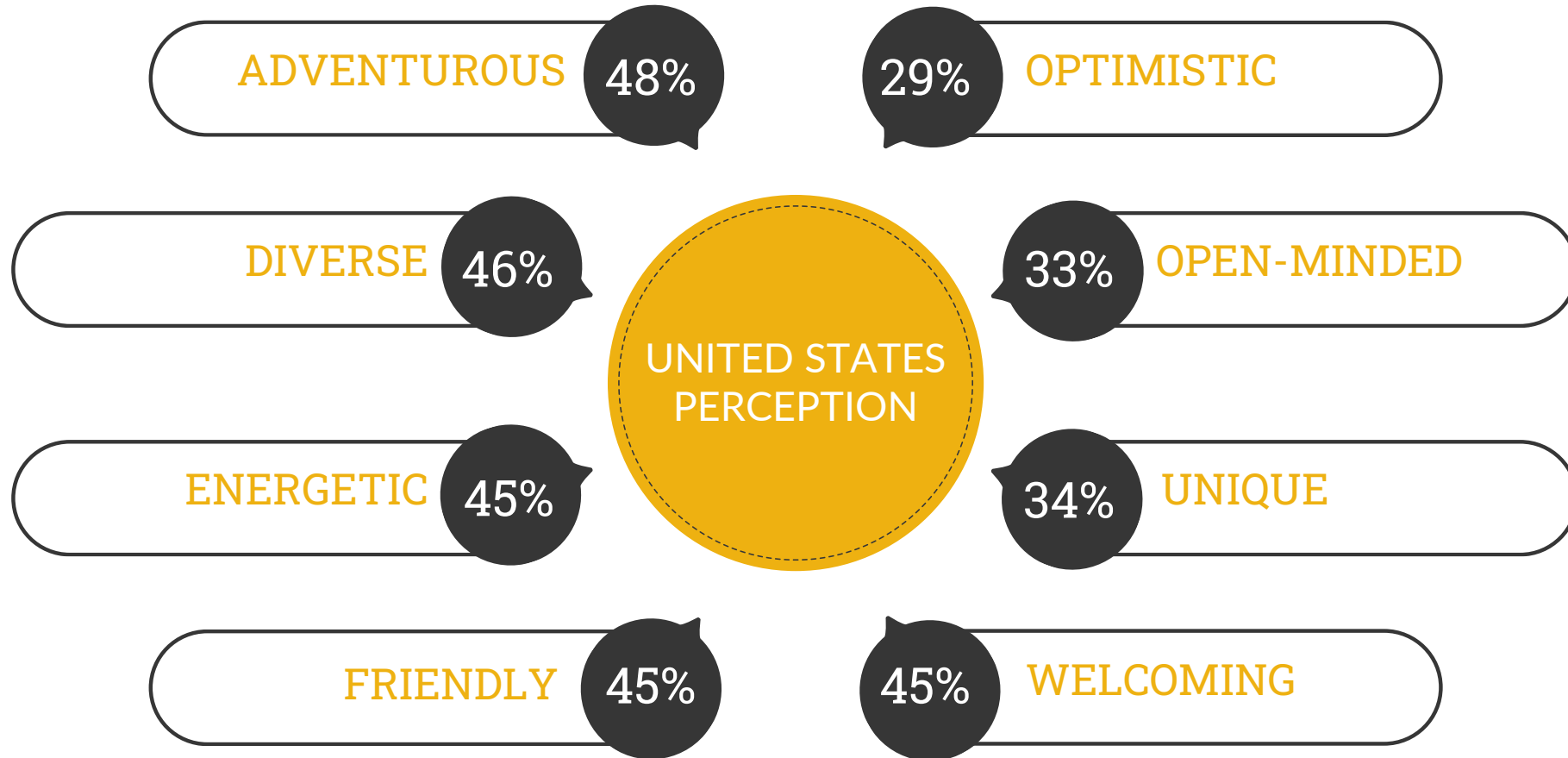
## Most Discouraging From Visiting a Destination

- 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

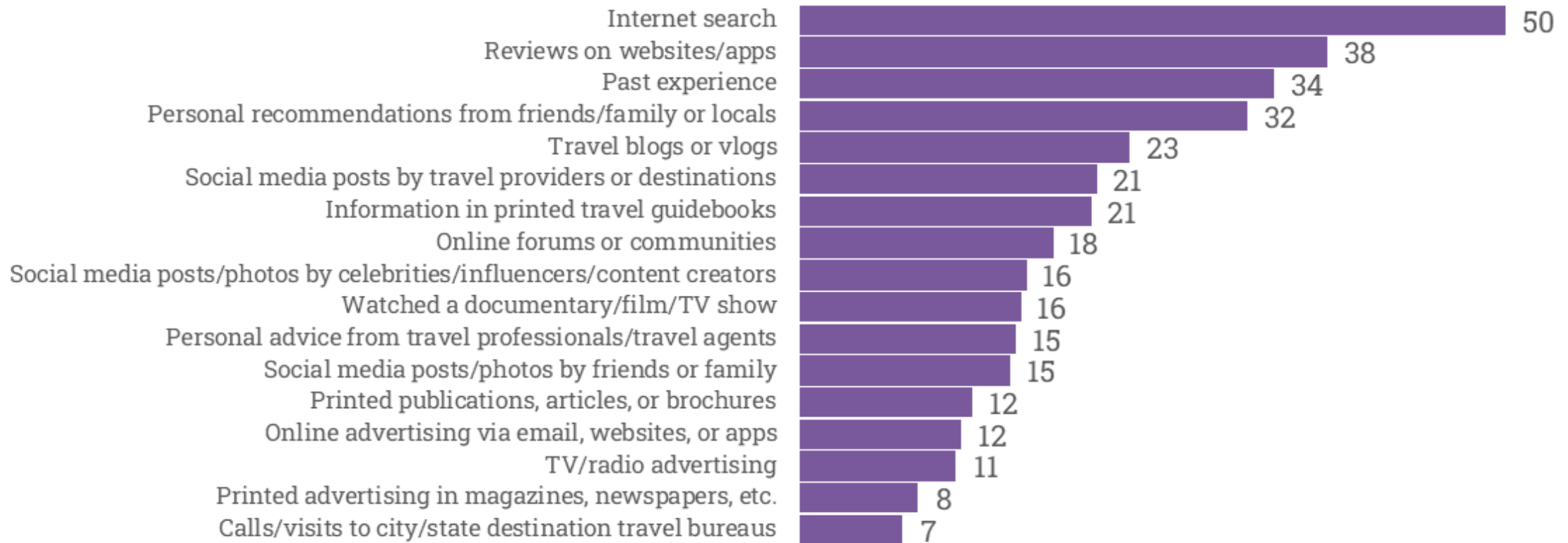


Note: United Kingdom visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)



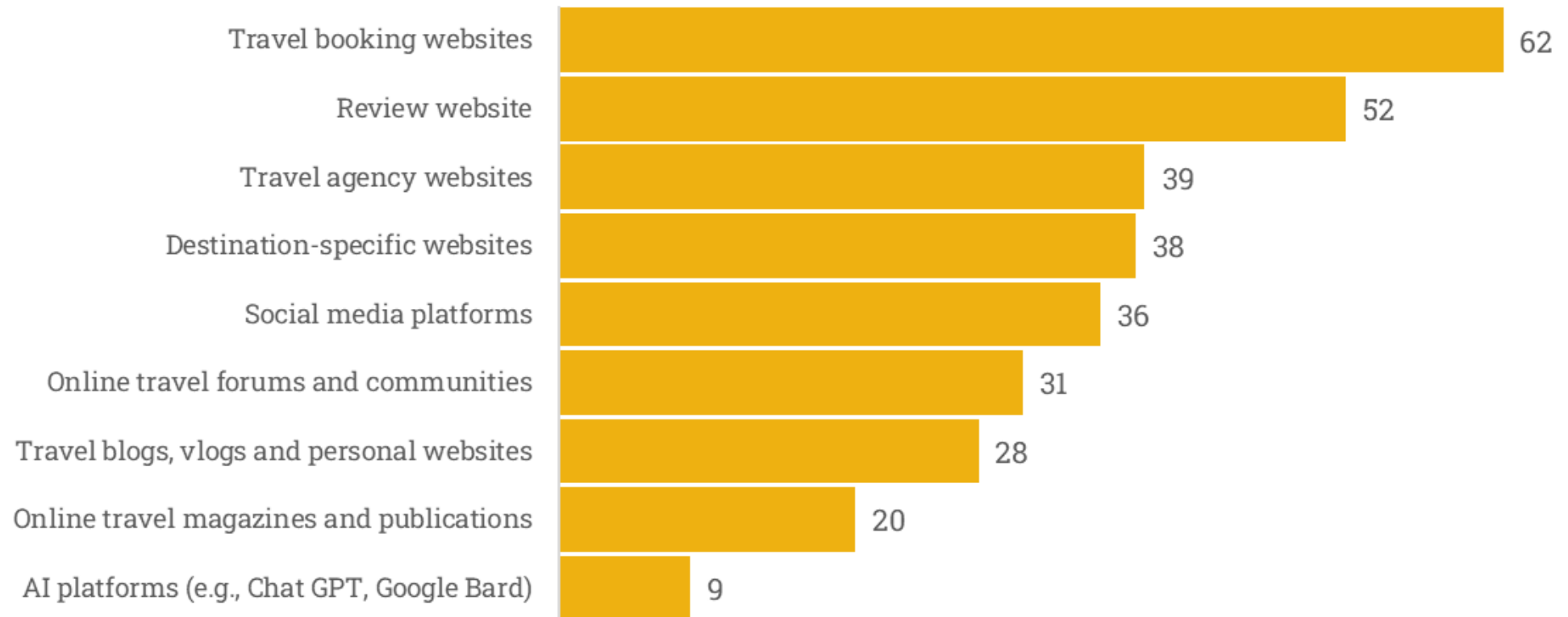
## Sources of Information for Destination Selection (%)



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.

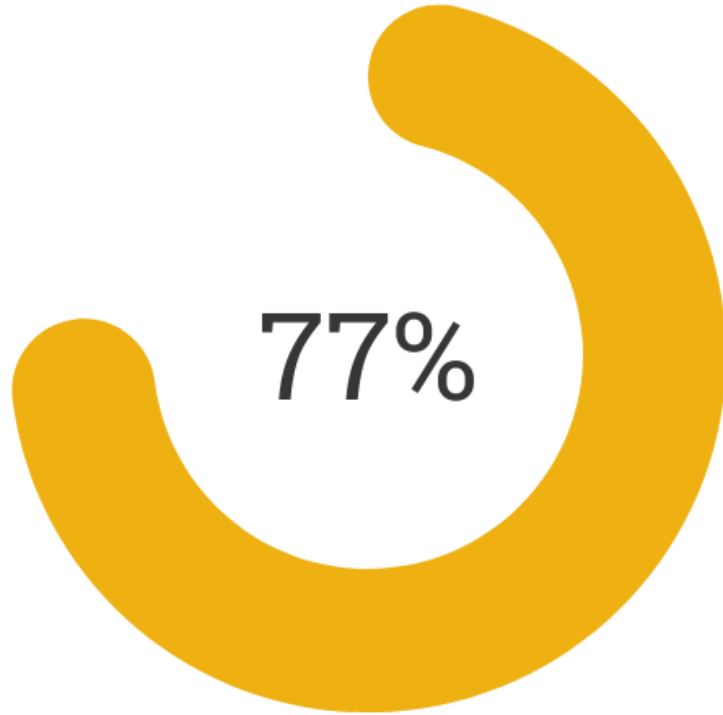


Note: German visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

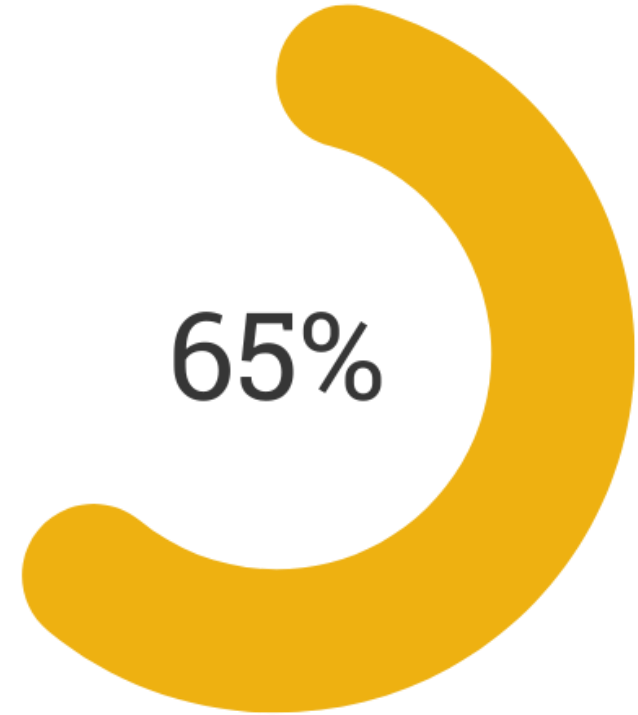
# GERMANY

---



## 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

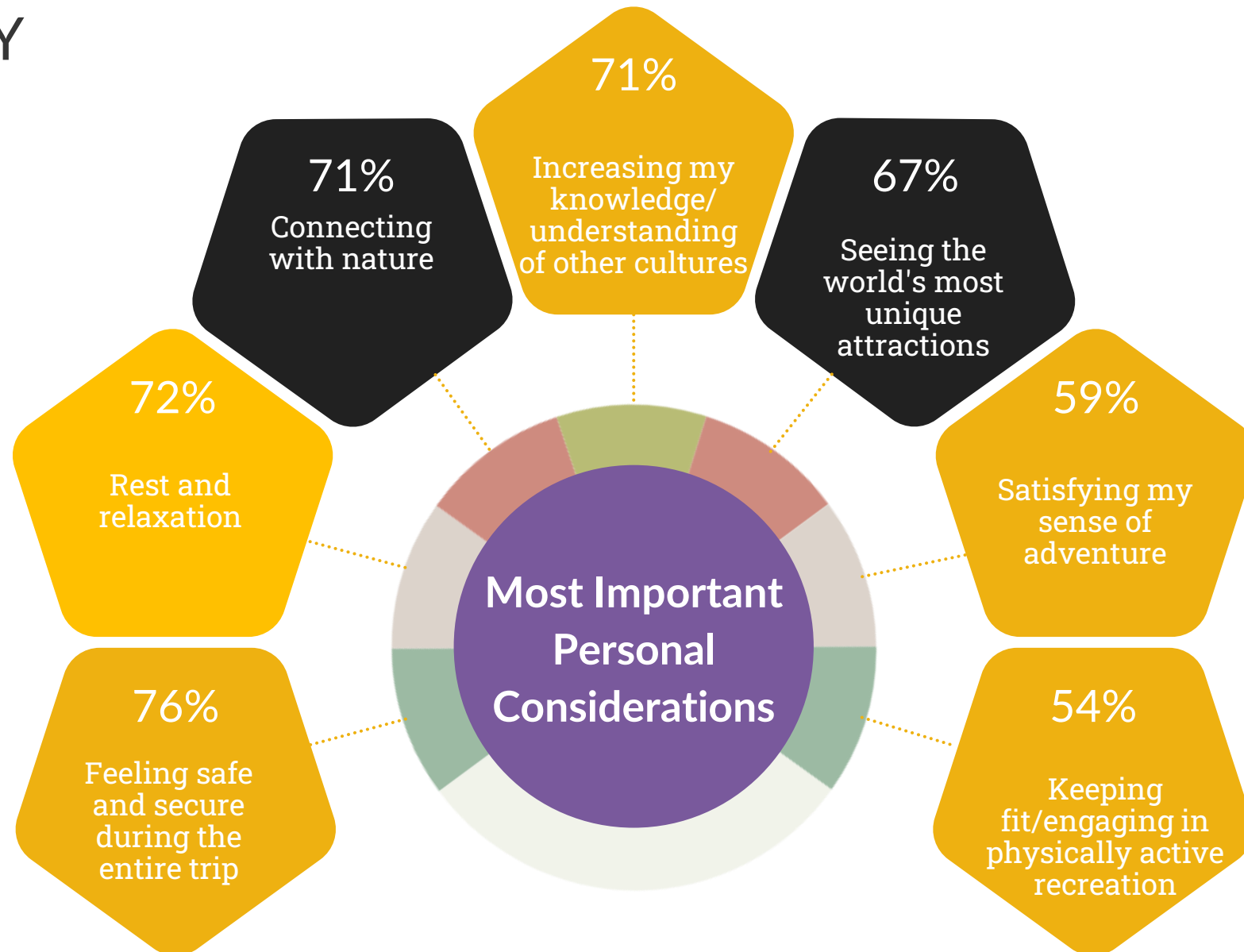
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10%

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

Source: Brand USA (Aug. 2024)

# GERMANY



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

Source: Brand USA (Aug. 2024)

# GERMANY

## Most Important When Choosing a Destination

- 75%** Climate or weather at the destination
- 74%** Landmarks and sightseeing options
- 73%** Accommodation options
- 73%** Natural features/landscapes
- 72%** Beaches/coastal activities
- 68%** Appeal of local culture
- 68%** Leisure attractions
- 65%** Ease of travel to the destination

## Most Discouraging From Visiting a Destination

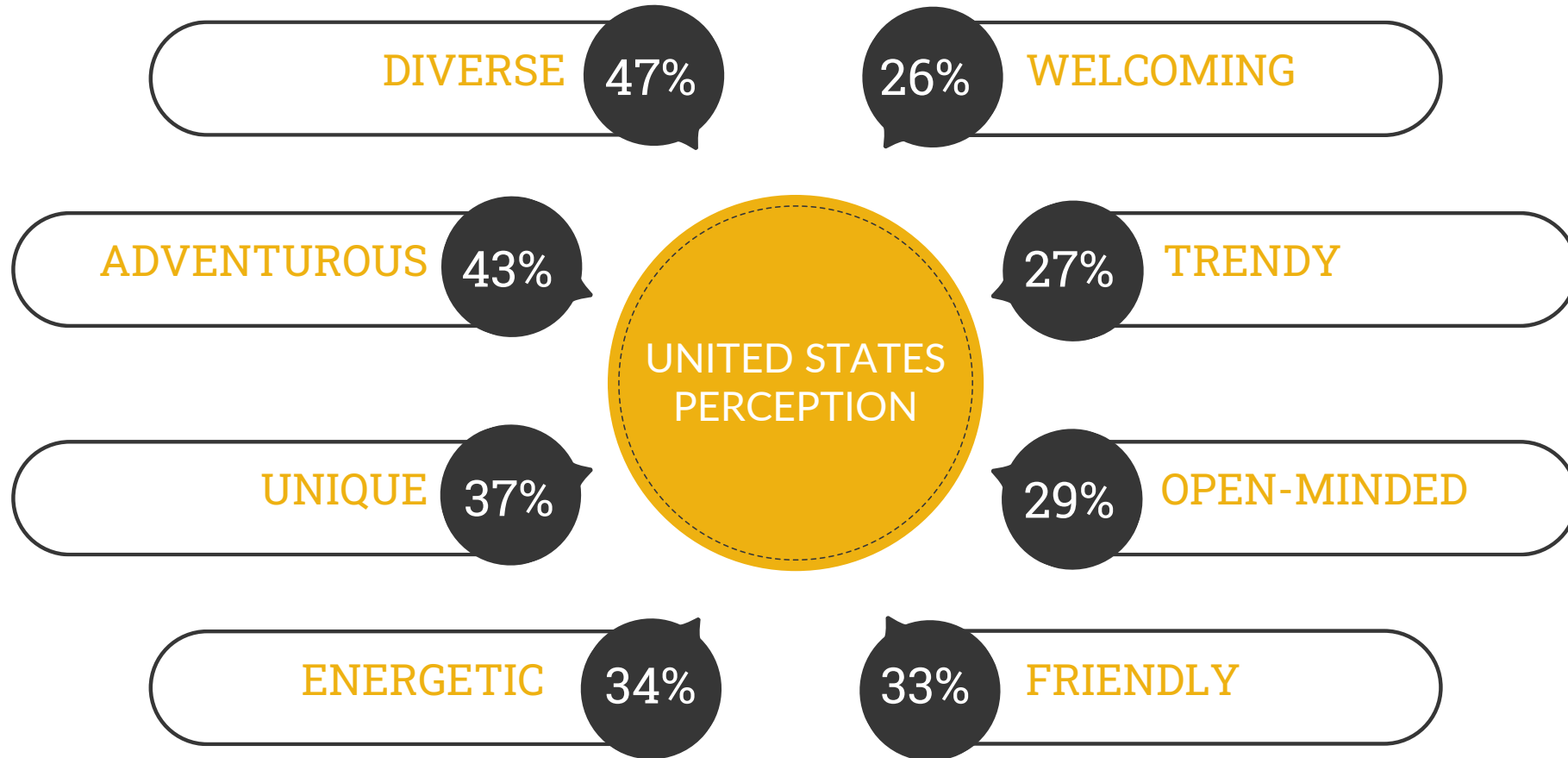
- 48%** Personal safety concerns
- 46%** Uncleanliness in the destination
- 42%** Crowdedness
- 38%** High prices
- 38%** Political climate not aligning with personal views
- 31%** Lack of environmental responsibilities
- 30%** Lack of information for planning trip & at destination
- 25%** Inconvenience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

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

Source: Brand USA (Aug. 2024)

# GERMANY

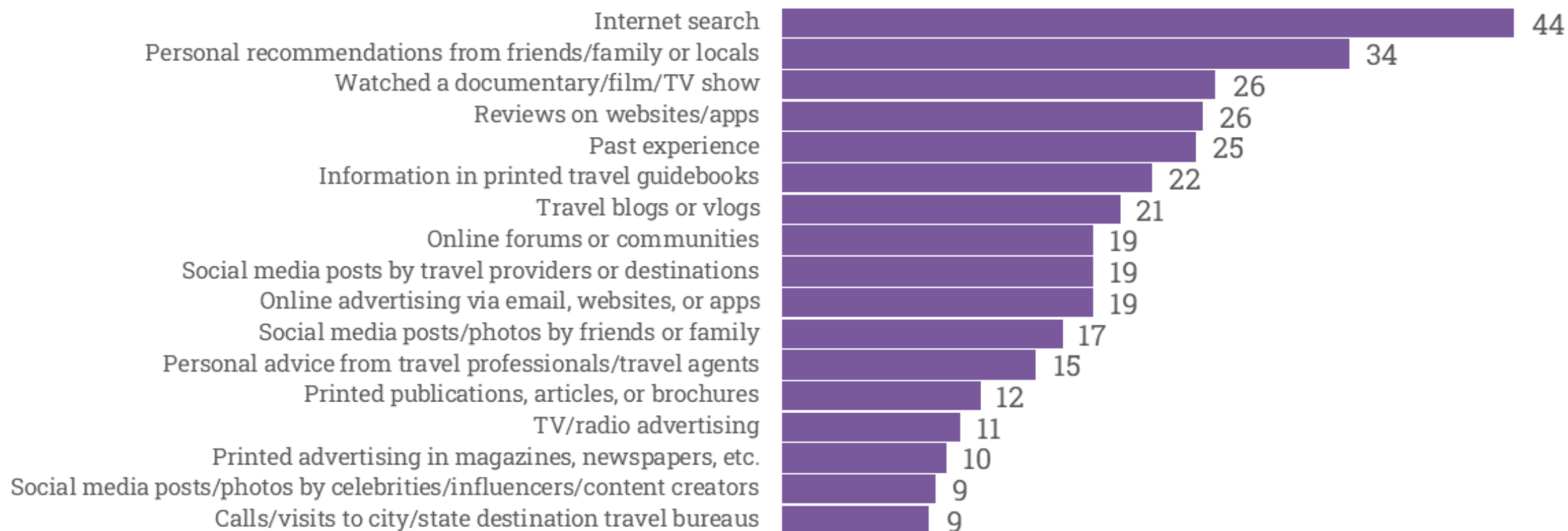
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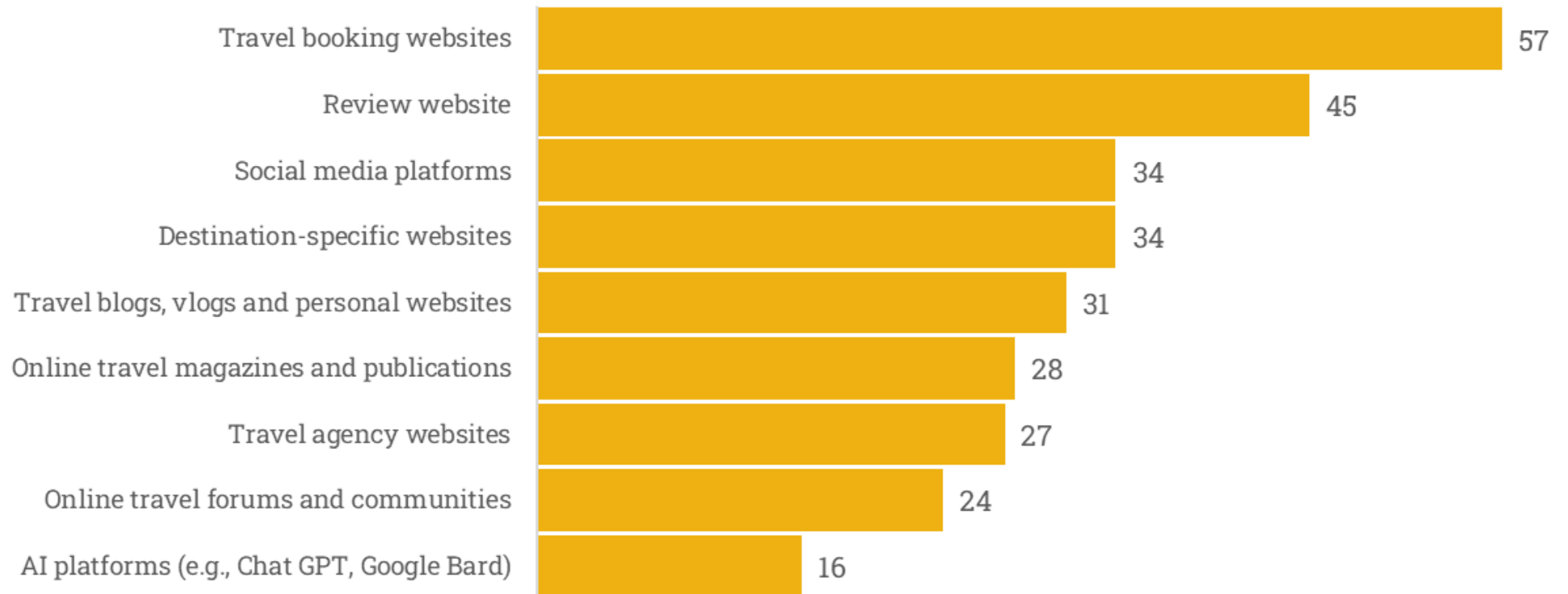
Note: German visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

## Sources of Information for Destination Selection (%)



## Websites Used for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

## Social Media Participation

YouTube	78%
Instagram	69%
Facebook/META	56%
Tik Tok	52%
Twitter/X	32%
Snapchat	31%
Pinterest	29%
LinkedIn	24%
Reddit	14%
Xing	14%
Tumblr	6 %

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

Source: Brand USA (Aug. 2024)



# GERMANY

---

## Likelihood of how 2025 will evolve:

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

45%

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

42%

Global wars/strife will impact the destinations visited in 2025

29%

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

29%

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

28%

Luxury travel experiences are an important part of leisure trips

# SOUTH KOREA



POPULATION  
*2024*

52M

REAL GDP  
GROWTH  
*2025 PROJECTION*

2.2%

CURRENCY  
RATE  
SOUTH KOREAN  
WON  
2024

1364.15

INFLATION  
RATE  
*2025 PROJECTION*

2.0%

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

9.1%

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

33.5%

# SOUTH KOREA

---

37%

Likelihood to Visit Travel South  
in the next Five Years

Note: South Korean visitors who are Likely to Travel Internationally

## Most Important Content For Destination Decisions:



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

Source: Future Partners (2025)

# SOUTH KOREA

---

Recall of “Buzz”: Travel South Destinations

33%

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



Note: South Korean visitors who are Likely to Travel Internationally

Source: Future Partners (2025)

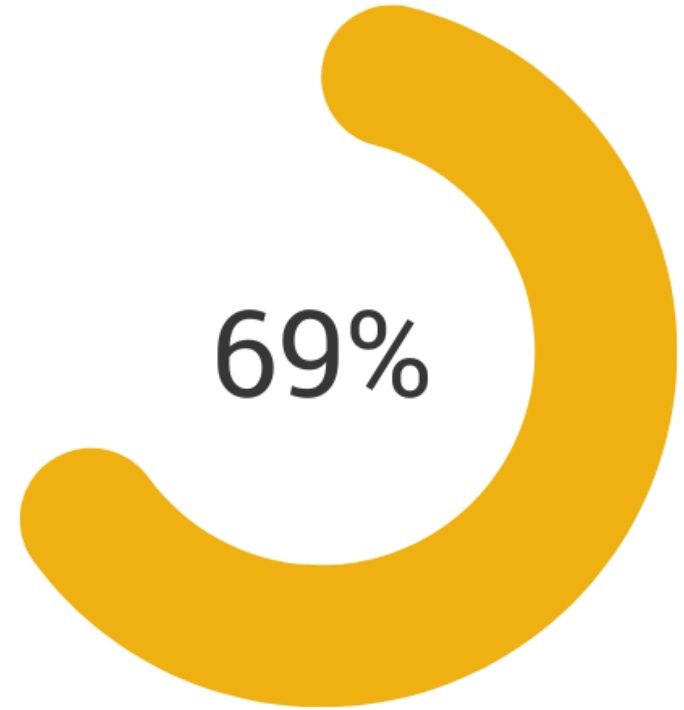
# SOUTH KOREA

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## APPEAL

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



## FAMILIARITY

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

# SOUTH KOREA

---



1 Trip

---

27%

2 Trips

---

24%

3-4 Trips

---

28%

5+ Trips

---

21%

3.1

Average Number of Leisure  
International Trips

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

Source: Brand USA (Aug. 2024)

# SOUTH KOREA

---



# 1.5

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

**1+ Trips**

---

50%

**1 Trip**

---

21%

**2 Trips**

---

7%

**3+ Trips**

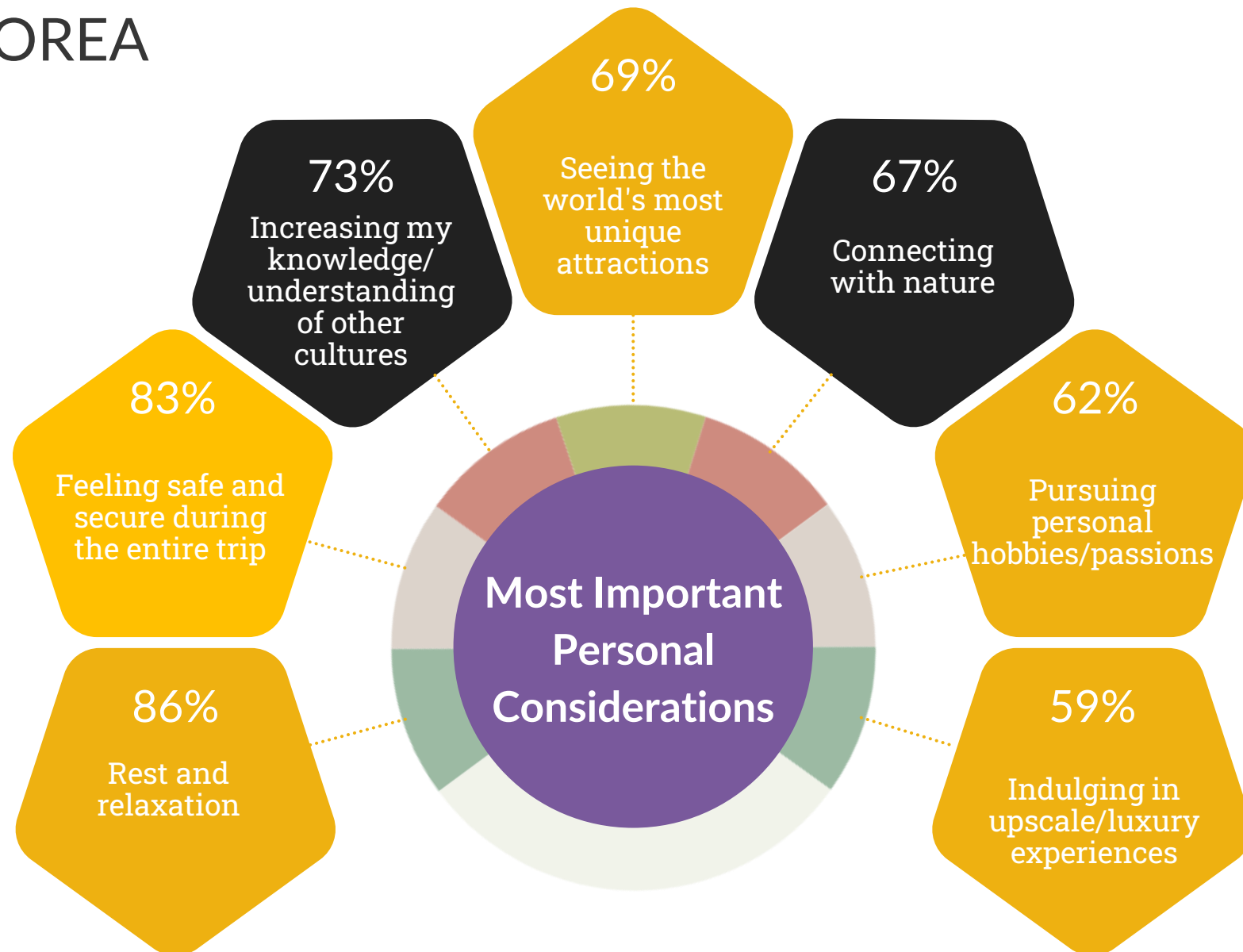
---

23%

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

Source: Brand USA (Aug. 2024)

# SOUTH KOREA



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

Source: Brand USA (Aug. 2024)



# SOUTH KOREA

## Most Important When Choosing a Destination

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

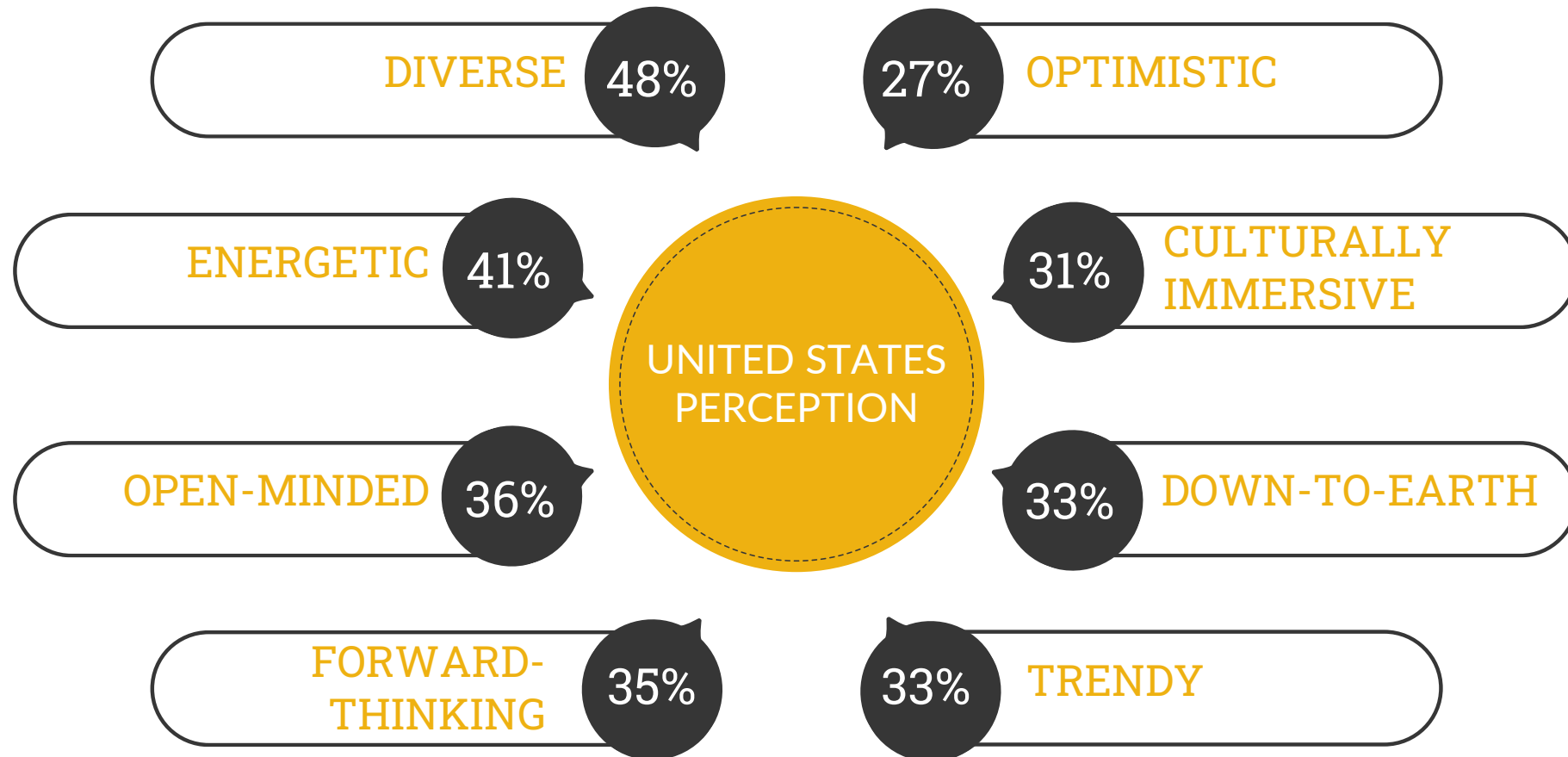
## Most Discouraging From Visiting a Destination

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

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

Source: Brand USA (Aug. 2024)

# SOUTH KOREA



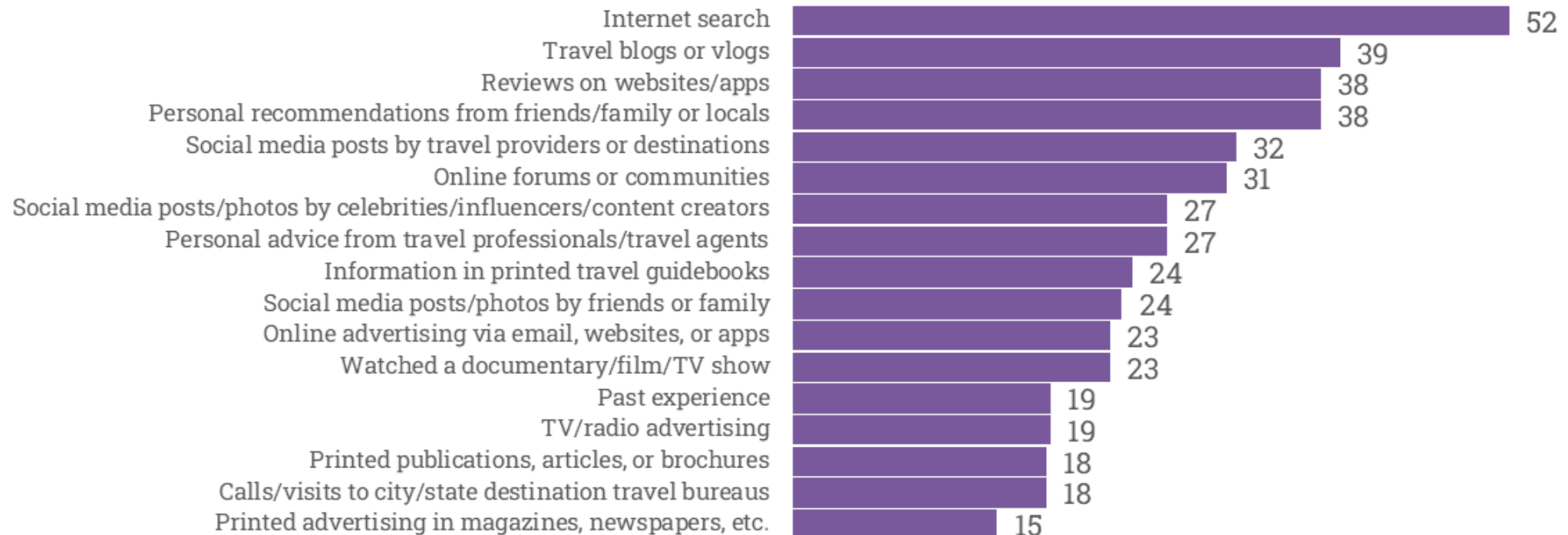
Note: South Korean visitors who have taken an overnight international trip since June 2022 and are interested in visiting the Travel South Region

Source: Brand USA (Aug. 2024)

# SOUTH KOREA



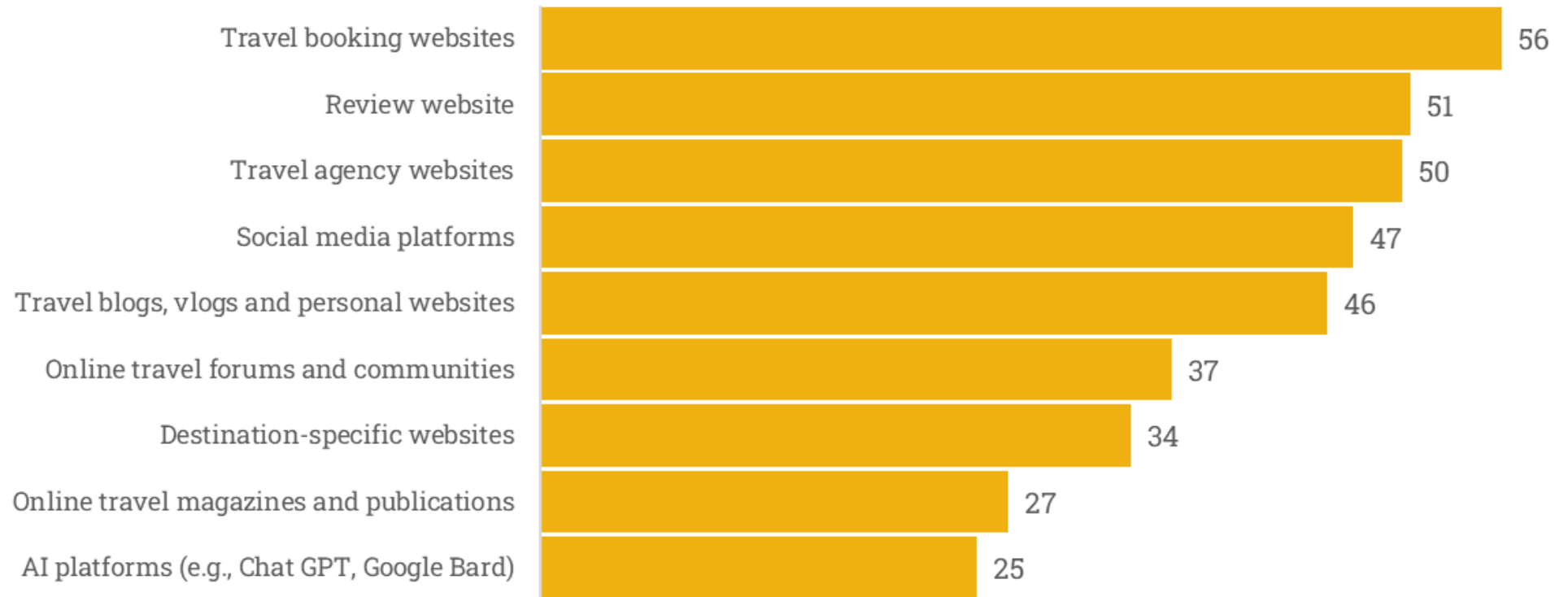
## Sources of Information for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

## Websites Used for Destination Selection (%)



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

Source: Brand USA (Aug. 2024)

# SOUTH KOREA

---



## Social Media Participation

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

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

Source: Brand USA (Aug. 2024)

# SOUTH KOREA

---

## Likelihood of how 2025 will evolve:

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

52%

Global wars/strife will impact the destinations visited in 2025

51%

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

50%

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

49%

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

48%

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

# Resources



# Market Profiles



## Global Partner Program

