



**TRAVEL
SOUTH
USA**

THE INTERNATIONAL
GATEWAY TO THE
SOUTHERN USA



Program of Work Australia

Growth Trajectory

2015–2019 CAGR

6.8%

Spending

4.6%

Visits

2023–2027 PROJECTED CAGR

5.9%

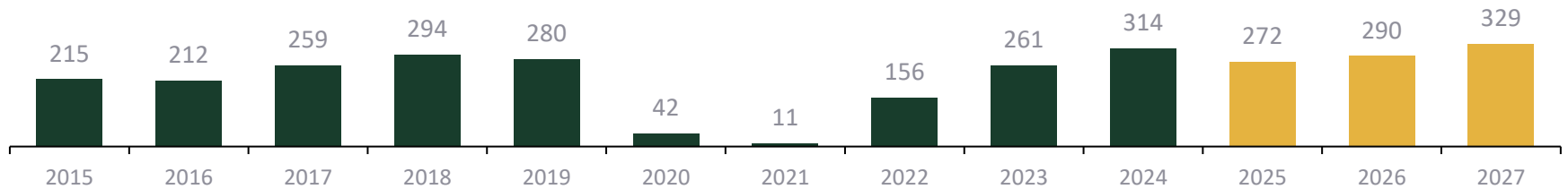
Spending

2.7%

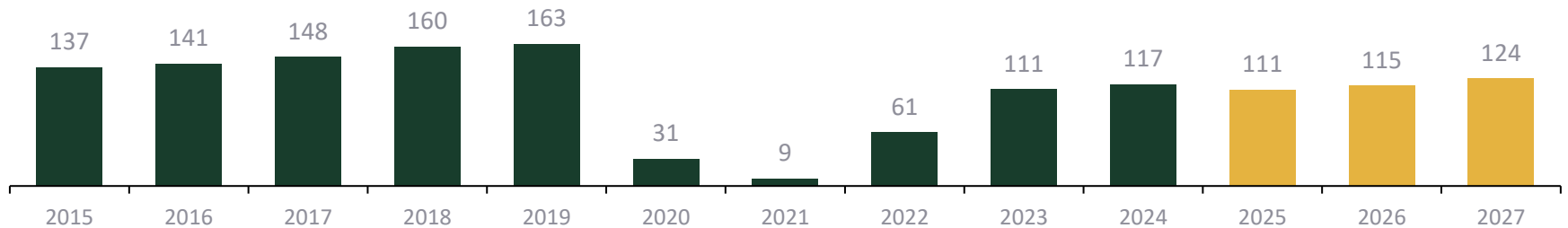
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Australia

\$289.7M

2026 TSUSA Spending

+6.4% YOY vs. 2025

115.2K

2026 TSUSA Visitors

+4.2% YOY vs. 2025

\$6.2B

2026 USA Spending

+6.2% YOY vs. 2025

2.3M

2026 USA Visitors

+4.4% YOY vs. 2025

\$272.3M

2025 TSUSA Spending

-13.1% YOY vs. 2024

110.6K

2025 TSUSA Visitors

-5.3% YOY vs. 2024

\$5.9B

2025 USA Spending

-11.1% YOY vs. 2024

2.2M

2025 USA Visitors

-3.2% YOY vs. 2024

Where are we?

Australia and New Zealand remain valuable long-haul markets for the USA, with travellers continuing to seek immersive, culturally rich and experience-led holidays.

High Destination Interest: While cost of living pressures, currency softness and competitive destinations such as Japan and Southeast Asia continue to shape decision-making, high-value travellers are still willing to spend on holidays that feel meaningful, distinctive and worth the investment. Travel South USA is well positioned to meet this moment through its strength in music, food, culture, road trips, warm hospitality and regional discovery.

Target Audience: Travel South USA will target high-value Late Millennials, Gen X and Early Boomers in Australia and New Zealand, with a focus on urban travellers who have strong travel intent, the means to travel, and a desire for culturally rich, experience-led holidays.

Consumer channels: 80 Facebook and Instagram posts delivered 173,833 reach and 71,337 video views. Increased investment in boosting and creator partnerships presents an opportunity to further expand reach and engagement.

Positive Media Response: 113 earned media placements generating 68 million impressions, supported by 96 media meetings and seven ANZ journalists attending Global Media Marketplace attendees.

Trade Engagement: 264 Agents with 200 pending for TS Mission = Total 464 & 226 Meetings

Strong newsletter engagement: 36.28% average open rate, far exceeding 20% target, with what's new content performing the best.

Strategic Plan for FY 2026-27

For FY2026-27, we recommend a three-pronged strategy focused on driving destination awareness, trade and media confidence and social content engagement across Australia and New Zealand.

TRAVEL TRADE OUTREACH

Build trade confidence and conversion by educating agents and operators on why the South is an easy, high-value and compelling add-on or standalone USA holiday.

Key activity:

- Product development and operator meetings
- Agent training, sales calls and webinars
- Trade newsletters
- International Showcase FAM recruitment & attendance
- Trade cooperative campaign
- Trade events and relationship building

PR & MEDIA OUTREACH

Maintain destination visibility through a strong earned media program that positions Travel South USA as culturally rich, editorially relevant and full of stories that Australian and New Zealand audiences want to read.

Key activity:

- Always-on media relations
- Editorial pitching across key content themes
- Media newsletters
- IMM attendance
- Global Media Marketplace and FAM recruitment & attendance

SOCIAL & CREATOR

Continue organic content to maintain breadth of coverage across partner states, while introducing a small paid social layer and UGC asset capture from a creator to improve engagement, reach and content quality.

Key activity:

- Organic Facebook and Instagram posting
- Small paid Meta boosting and dark post budget
- UGC asset capture for social, trade and PR use

AUSTRALIA/NZ Market Overview

KPI's & GOALS

Project	KPI
TRADE	
Tour operator meetings	60
Agent Trainings	500
International Showcase & FAMs participants	10
Travel South Travel Trade Newsletter	10x
Open rate for Newsletters/leads generated	20%+
Managed Media	
Media Meetings	50
No. of Articles Generated	100
Impressions	30M
Global Media Marketplace & FAMs	5
Travel South USA PR Newsletters	10x
Open rate for Newsletters/leads generated	20%+
Social Posts - Owned Channels	
Facebook # of Posts (at least 8 per month)	96+
Consumer Campaigns	
Where Music Was Born	15.27M Impressions - 203% over target
Partner Engagement	
Alabama Highlighted Activation	1
Kentucky Highlighted Activation	1
Louisiana Highlighted Activation	1
Mississippi Highlighted Activation	1
Missouri Highlighted Activation	1
North Carolina Highlighted Activation	1
South Carolina Highlighted Activation	1
Tennessee Highlighted Activation	1
ROTS Highlighted Activation	1

Australia / New Zealand - 2026

Category	Date	Description	Location
Trade	July 15, 2026	Southern Sydney Home Based Agents Lunch and Learn	The Shire, Southern Sydney
Trade	Sept 30 & 1 October 2026	Melbourne Sales Calls and TADA (Travel Agents Day Australia)	Melbourne Australia
Trade	October 9-11 2026	Beyond Borders and NTIA	Melbourne Australia
Trade	October 26-30 2026	New Zealand Sales Calls and Regional Visit USA	Auckland, Palmerston North, Hawkes Bay/Napier
Media	October 1, 2026	Melbourne Media Meetings	Melbourne Australia
Trade	November 28, 2026	Gate 7 Industry Thanksgiving Event	Sydney Australia
Trade	Nov 29-Dec 3, 2026 + Dec 3 - 6, 2026	Travel South International Showcase	Nashville, TN + FAMS

Australia / New Zealand - 2027

Category	Date	Description	Location
Media	February 18 & 19, 2027	IMM Travmedia	Sydney
Consumer	February	Where Flavour Was Born	Australia
Media	April 21-26, 2027	GMM Pre-Fam	All States
Media	April 26-29, 2027	Travel South Media Marketplace	Bentonville, AR
Trade	May 2-6, 2027	IPW	New Orleans, LA