TOP FIVE AUSTRALIAN TRAVEL AGENCIES OUTBOUND TO THE USA

1. Flight Centre Travel Group
2. Holloworld Travel Services
3. Express Travel Group
4. Webjet Marketing
5. Expedia Australia

DOMINANT TRIP PERSONAS

Local
These trips are focused on what’s special or unique for an area. Travelers will be looking for off the beaten path and destination-centric experiences.

Excitement
These trips are all about the iconic sights and experiences - the big, exciting, must-sees.

MOTIVATIONS FOR DESIRE TO VISIT THE USA
1. Culture/historical attractions (museums, landmarks), 56%
2. Shopping 55%
3. Local Lifestyle 52%

WHERE THEY TRAVEL OUTSIDE THE USA

DESTINATION SELECTION CHANNELS
- Online Video (OLV)
- Social Media
- Out of Home
- TV

WEBSITES USED IN DESTINATION SELECTION
- General Search Engines
- Traveler Review Website
- Airline Website
- Online Travel Agent (OTA)

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

1. New York City
2. Orlando
3. San Francisco
4. Los Angeles
5. Dallas
6. Chicago
7. Seattle
8. Washington
9. Las Vegas
10. Honolulu

INFLUENTIAL ADVERTISING MEDIA CHANNELS

WHERE THEY BOOK TRAVEL TO THE USA

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS
- September-March
- June-December
- December-June

TOP 3 PEAK ARRIVAL MONTHS
- September
- June
- December

WHY THEY VISIT THE USA

TOP 5 AUSTRALIA TO USA TRAVEL AGENTS
- Flight Centre Travel Group
- Holloworld Travel Services
- Express Travel Group
- Webjet Marketing
- Expedia Australia

WHO THEY ARE

ARRIVALS TO THE USA
1. Leisure, 86.9%
2. Business, 12.3%
3. Students, 0.8%

TRAVEL PARTY
1. Couples, 39%
2. Family w/Kids, 29%
3. Solo, 23%

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION
1. Resting and relaxation
2. Seeing the world’s most unique attractions
3. Increasing my knowledge/understanding of local cultures

39% OF INDIVIDUALS UNDER 55 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

30% First Time
70% Repeat

FIRST TIME: REPEAT

Average length of stay in the USA
19.3 Days

WHERE TO REACH THEM

SOURCE: NTTA 2018, 12 MONTHLY ARRIVALS SURVEY AND U.S. VISITORS INC. 2018 HUMAN TRAFFIC INFORMATION.

SOURCE: NTTA 2018 MARKET PROFILE, AND OXFORDECONOMIES 2018 MARKET INTELLIGENCE.

SOURCE: NTTA 2018 MARKET PROFILES AND OXFORDECONOMIES 2018 MARKET INTELLIGENCE.

SOURCE: NTTA 2018 MARKET PROFILES, AND OXFORDECONOMIES 2018 MARKET INTELLIGENCE.

OXFORD ECONOMIES JUNE 2019; ARC/IATA 2018.

ARC/IATA 2018.

TOP FIVE BRAZILIAN TRAVEL AGENCIES OUTBOUND TO THE USA

Decolar.com
CVC Brasil Operadora e Agencia de Viagens
Esferatur
Passagens e Turismo
Flytour Agencia de Viagens e Turismo
Pichioni Viagens e Turismo

DECOLAR

Brand USA
**TOP FIVE CANADIAN TRAVEL AGENCIES OUTBOUND TO THE USA**

1. Expedia
2. Tour East Holidays
3. Red Label Vacations
4. Westjet Vacations
5. GB Travel Canada

**WHY THEY VISIT THE USA**

DOMINANT TRIP PERSONAS

Favorite

Think the "annual vacation." Not everything is formulaic, but these travelers have some parameters (typically season) and certain elements they seek to repeat no matter where they go.

- Excitement

These trips are all about the iconic sights and experiences – the big, exciting, must-sees.

MOTIVATIONS FOR DESIRE TO VISIT THE USA

1. Beaches/seaside attractions, 52%
2. Cultural/historical attractions (museums, landmarks), 47%
3. Local lifestyle, 42%

**WHERE THEY TRAVEL**

**DESTINATION SELECTION CHANNELS**

- General Search Engines
- Traveler Review Website
- Online Travel Agency (OTA)
- Mobile Phone
- Tablet

**WHERE THEY TRAVEL OUTSIDE THE USA**

- USA
- Mexico
- Cuba
- France
- Italy
- Greece
- Dominican

**TOP FIVE FINAL FLIGHT DESTINATIONS IN THE USA**

- New York City
- Los Angeles
- Orlando
- Chicago
- San Francisco
- Boston
- Washington D.C.

**AVERAGE LENGTH OF STAY IN THE USA**

8 Days

**WHEN THEY BOOK & VISIT**

- PEAK PLANNING MONTHS: March-May, February-April, October-December
- TOP PEAK ARRIVAL MONTHS: August, July, March

37% of Canadians are likely to travel to the USA in the next two years.

**TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION**

1. Rest and relaxation
2. Seeing the world's most unique attractions
3. Increasing my knowledge/understanding of local cultures

**EXPLORE THE USA**
**WHO THEY ARE**

- **Arrivals to the USA by Visa Type**
  1. Leisure, 68.1%
  2. Students, 19.3%
  3. Business, 12.6%

- **Travel Party**
  1. Couple, 49%
  2. Family w/ Kids, 45%
  3. Solo, 17%

**WHEN THEY BOOK & VISIT**

- **Top 3 Important Personal Considerations when Selecting Destination**
  1. Resting and relaxation
  2. Seeing the world's most unique attractions
  3. Connecting with nature

- **56% of Individuals Under 35 Who Are Likely to Visit the USA in the Next Two Years**

- **Peak Planning Months**
  - June-July
  - May June
  - November-December

- **Top 3 Peak Arrival Months**
  - August
  - July
  - January

**WHY THEY VISIT THE USA**

- **Dominant Trip Personas**
  - **Escape**
    - These trips are more low-energy. The Great Outdoors (e.g. national parks and beaches) will resonate strongly with this group.
  - **Excitement**
    - These trips are all about the iconic sights and experiences — the big, exciting, must-sees.

**Motivations for Desire to Visit the USA**

1. Culture/historic attractions (museums, landmarks), 75%
2. Urban attractions (nightlife, city tours), 73%
3. Ecotourism and nature, 71%

**WHERE TO REACH THEM**

- Influential Advertising Media Channels
- Websites used in destination selection
- Destination Selection Channels
- Mobile Phone
- Computer or Laptop
- Tablet
- Travel Search Engines
- Travel Guide Websites
- General Search Engines

**WHERE THEY TRAVEL**

- Where They Travel Outside the USA
- Where They Travel in the USA
- Top Five Chinese Travel Agencies Outbound to the USA

**Average length of stay in the USA**

12 Days*

**First Time: Repeat**

- 33% First Time
- 67% Repeat

**Peak planning months**

- June-July
- May-June
- November-December

**Top 3 peak arrival months**

- August
- July
- January

**Dominant trip personas**

- Escape
  - These trips are more low-energy. The Great Outdoors (e.g. national parks and beaches) will resonate strongly with this group.
- Excitement
  - These trips are all about the iconic sights and experiences — the big, exciting, must-sees.

**Motivations for desire to visit the USA**

1. Culture/historic attractions (museums, landmarks), 75%
2. Urban attractions (nightlife, city tours), 73%
3. Ecotourism and nature, 71%


**Where they travel outside the USA**

- Thailand
- Japan
- South Korea
- New York
- Singapore
- USA

**Where they travel in the USA**

- Hawaii
- East Coast
- West Coast
- Midwest
- Florida

**Top five Chinese travel agencies outbound to the USA**

1. Ctrip
2. Huachen Southwest
3. Ever Bright Town
4. Merchants International Business
5. E-Fly Air Travel

TOP FIVE FRENCH TRAVEL AGENCIES OUTBOUND TO THE USA

1. TUI France
2. Global Business Travel France
3. Mister Fly
4. CWT France
5. Egencia France

WHY THEY VISIT THE USA

DOMINANT TRIP PERSONAS

Local

These trips are focused on what’s special or unique for an area. Travelers will be looking for off the beaten path and destination-centric experiences.

Escape

These trips are more low-energy. The Great Outdoors (e.g. national parks and beaches) will resonate strongly with this group.

MOTIVATIONS FOR DESIRE TO VISIT THE USA

1. Local lifestyle, 75%
2. Cultural/historical attractions (museums, landmarks), 59%
3. Urban attractions (nightlife, city tours), 59%

WHERE THEY TRAVEL

WHERE THEY BOOK THE TRAVEL

WHEN THEY TRAVEL

TOP 3 PEAK ARRIVAL MONTHS

July
April
August

Average length of stay in the USA

14.3 Days

FIRST TIME: 27%
REPEAT: 73%

+6% YoY CHANGE IN ARRIVAL, 2018 GROWTH

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

WEBSITES USED IN DESTINATION SELECTION

DESTINATION SELECTION CHANNELS

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

USA Traveler
USA Traveler
USA Traveler
USA Traveler

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

Source: Oxford Economics June 2019, ARC/IATA, 2018。

TOP FIVE GERMAN TRAVEL AGENCIES OUTBOUND TO THE USA

1. TUI Germany
2. Reisebueroservice
3. Egencia
4. AER Ticket
5. BCD Travel Germany

WHY THEY VISIT THE USA

DOMINANT TRIP PERSONAS

These trips are focused on what's special or unique for an area. Travelers will be looking for off the beaten path and destination-centric experiences.

Escape

MOTIVATIONS FOR DESIRE TO VISIT THE USA

1. Shopping, 44%
2. Cultural/historical attractions (museums, landmarks), 42%
3. Dining/gastronomy, 40%

WHERE THEY TRAVEL OUTSIDE THE USA

1. Austria
2. Italy
3. France
4. Spain
5. Netherlands
6. USA

WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 76.2%
2. Business, 22.8%
3. Student, 1.0%

TRAVEL PARTY:

1. Couple, 51%
2. Family w/ Kids, 20%
3. Solo, 20%

WHEN THEY BOOK & VISIT

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

1. Resting and relaxation
2. Seeing the world's most unique attractions
3. Connecting with nature

48% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

Most German travelers decide which destination to visit between 3 and 5 months before traveling there.

Average length of stay in the USA
16.2 Days

19% FIRST TIME
81% REPEAT

FIRST TIME: REPEAT

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

TV
SOCIAL MEDIA
DIGITAL MAGAZINES
MAGAZINE

WEBSITES USED IN DESTINATION SELECTION
GENERAL SEARCH ENGINE
TRAVELER REVIEW WEBSITE
AIRLINE WEBSITE
ONLINE TRAVEL AGENCY (OTA)

DESTINATION SELECTION CHANNELS
COMPUTER OR LAPTOP
PRINTED GUIDEBOOK
ONLINE ADVERTISING, EMAIL

WHERE THEY TRAVEL

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

1. Los Angeles
2. San Francisco
3. New York
4. Chicago
5. Orlando
6. Atlanta
7. New Orleans
8. Houston
9. San Diego
10. Denver

WHERE THEY BOOK TRAVEL TO THE USA

TOP 5 GERMAN TRAVEL AGENCIES OUTBOUND TO THE USA

1. TUI Germany
2. Reisebueroservice
3. Egencia
4. AER Ticket
5. BCD Travel Germany
**Top Five Indian Travel Agencies Outbound to the USA**

1. Riya Travel and Tours & Holidays
2. Akbar Travels of India
3. Make My Trip
4. CWT India
5. TEK Travels

**Dominant Trip Personas**

- **Escape**
  - These trips are more low-energy. The Great Outdoors (e.g., national parks and beaches) will resonate strongly with this group.
- **Excitement**
  - These trips are all about the iconic sights and experiences – the big, exciting, must-sees.

**Influential Advertising Media Channels**

- Social Media
- Digital Publishers
- News
- Cinema

**When They Book & Visit**

- **Peak Planning Months**
  - March-April
  - April-May
  - June-July

- **Top 3 Peak Arrival Months**
  - May
  - June
  - August

**Average length of stay in the USA**

- 15 Days*

**Where They Travel**

- **Top 10 Final Flight Destinations in the USA**
  - New York City
  - Los Angeles
  - San Francisco
  - Chicago
  - Houston
  - Atlanta
  - Miami
  - Seattle
  - Boston
  - District of Columbia

**Why They Visit the USA**

1. Beaches/seaside attractions, 71%
2. Shopping, 66%
3. Urban attractions (nightlife, city tours), 64%

**Why They Are**

- **Arrivals to the USA by Visa Type**
  - 1. Leisure, 66.6%
  - 2. Business, 20.7%
  - 3. Students, 12.7%

- **Travel Party**
  - 1. Family w/Kids, 50%
  - 2. Couples, 27%
  - 3. Solo, 19%

**Travel to the USA**

- **Top 3 Important Personal Considerations When Selecting Destination**
  - 1. Seeing the world’s most unique attractions
  - 2. Connecting with nature
  - 3. Resting and relaxation

- **60% of Individuals Under 35 Who Are Likely to Visit the USA in the Next Two Years**

**Dominant Trip Personas**

- **Escape**
  - These trips are more low-energy. The Great Outdoors (e.g., national parks and beaches) will resonate strongly with this group.
- **Excitement**
  - These trips are all about the iconic sights and experiences – the big, exciting, must-sees.

**Motivations for Desire to Visit the USA**

1. Beaches/seaside attractions, 71%
2. Shopping, 66%
3. Urban attractions (nightlife, city tours), 64%
TOP FIVE JAPANESE TRAVEL AGENCIES OUTBOUND TO THE USA

01 JTB
02 H.I.S.
03 KNT-CT
04 Kabushiki Kaisha Nihon Ryoko
05 Expedia Japan

WHERE THEY TRAVEL

WHERE THEY BOOK TRAVEL TO THE USA

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

US States

Canada

Europe

Asia

Top 5: New York, Chicago, San Francisco, Los Angeles, Seattle

WHERE THEY TRAVEL OUTSIDE THE USA

1. China
2. USA
3. France
4. South Korea
5. Thailand
6. Vietnam
7. Mexico

DESTINATION SELECTION CHANNELS

WEBSITES USED IN DESTINATION SELECTION

INFLUENTIAL ADVERTISING MEDIA CHANNELS

01 TV
02 MAGAZINES
03 SOCIAL MEDIA
04 ONLINE VIDEO (OTV)

WEBSITES USED IN DESTINATION SELECTION

GENERAL SEARCH ENGINE
ONLINE TRAVEL AGENCY (OTA)
TRAVELER REVIEW WEBSITE
AIRCINE WEBSITES
MOBILE PHONES
PRINTED GUIDEBOOK
COMPUTER OR LAPTOP

WHO THEY ARE

ARRIVALS TO THE USA
BY VISA TYPE
1. Leisure, 84.5%
2. Business, 14.2%
3. Students, 1.3%

TRAVEL PARTY:
1. Family w/Kids, 23%
2. Couples, 23%
3. Solo, 16%

WHEN THEY BOOK & VISIT

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION
1. Resting and relaxation
2. Staying within my comfort zone
3. Seeing the world’s most unique attractions

36% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

WHY THEY VISIT THE USA

DOMINANT TRIP PERSONAS

Local

These trips are focused on what’s special or unique for an area. Travelers will be looking for off the beaten path and destination-centric experiences.

Escape

These trips are more low-energy. The Great Outdoors (e.g. national parks and beaches) will resonate strongly with this group.

MOTIVATIONS FOR DESIRE TO VISIT THE USA
1. Dining/gastroonomy, 73%
2. Shopping, 56%
3. Cultural/historical attractions (museums, landmarks), 55%

WHERE TO REACH THEM

NEWSPAPER
TELEVISION
INTERNET
MOBILE
DIRECT MAIL

Average length of stay in the USA
6.6 Days

FIRST TIME: REPEAT

25% FIRST TIME
75% REPEAT

TOP CHANGE IN ARRIVAL, JUNE 2018

-3%
**WHO THEY ARE**

**TRAVEL PARTY:**
1. Family w/ Kids, 51%
2. Couples, 35%
3. Solo, 10%

**TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION**
1. Increasing my knowledge/understanding of other cultures
2. Resting and relaxation
3. Seeing the world's most unique attractions

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**WHEN THEY BOOK & VISIT**

**PEAK PLANNING MONTHS**
- November-January
- June-August
- July-September

**TOP 3 PEAK ARRIVAL MONTHS**
- April
- November
- December

*Most Mexican travelers decide which destination to visit between 3 and 5 months before traveling there.*

**WHY THEY VISIT THE USA**

**DOMINANT TRIP PERSONAS**

**Escape**

These trips are more low-energy: The Great Outdoors (e.g. national parks and beaches) will resonate strongly with this group.

**Excitement**

These trips are all about the iconic sights and experiences – the big, exciting, must-sees.

**MOTIVATIONS FOR DESIRE TO VISIT THE USA**
1. Cultural/historical attractions (museums, landmarks), 61%
2. Shopping, 54%
3. Urban attractions (nightlife, city tours), 54%

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**WHERE THEY TRAVEL**

**WHERE THEY TRAVEL OUTSIDE THE USA**

**TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA**

- 1. USA West
- 2. Florida
- 3. California
- 4. Canada
- 5. Columbia

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**WHERE THEY BOOK TRAVEL TO THE USA**

**TOP FIVE MEXICAN TRAVEL AGENCIES OUTBOUND TO THE USA**

- 1. Despegar.com
- 2. Corporate Travel Services
- 3. GBT Travel Services
- 4. Viajes Beta
- 5. BCD Travel
TOP FIVE SOUTH KOREAN TRAVEL AGENCIES OUTBOUND TO THE USA

1. Hana Tour Service
2. Modetour
3. Interpark
4. Yellow Balloon Tour
5. Tiseo

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION
1. Resting and relaxation
2. Staying within my comfort zone
3. Seeing the world's most unique attractions

TRAVEL PARTY:
1. Couple, 31%
2. Family w/ Kids, 29%
3. Solo, 16%

ARRIVALS TO THE USA BY VISA TYPE
1. Leisure, 87.8%
2. Business, 7.9%
3. Students, 4.3%

Peak Planning Months
- August-October
- December-February
- February-April

Top 3 Peak Arrival Months
- January
- June
- July

Most South Korean travelers decide which destination to visit between 3 and 5 months before traveling there.

Average length of stay in the USA

5 Days*

First Time: Repeat

47% First Time
53% Return

فوائد السفر إلى الولايات المتحدة
- الهوية الثقافية والتاريخية (المتاحف والمعالم السياحية)، 59%
- الساحل والمعالم الساحلية، 59%
- الطبيعة للسياحة في الطبيعة، 56%

Sources: Oxford Economics, June 2019; Arctic, 2018; Ministry of Tourism, Korea, OTR 2018; US Department of Commerce, OTR 2018.

Outlook: These trips are all about the iconic sights and experiences – the big, exciting, must-sees.

Brand USA
TOP FIVE BRITISH TRAVEL AGENCIES OUTBOUND TO THE USA

- Virgin Holidays
- Gold Medal Travel Group
- Vacationspot
- British Airways Holidays
- Travel 2

DOMINANT TRIP PERSONAS

- **Local**
  - These trips are focused on what’s special or unique for an area. Travelers will be looking for off the beaten path and destination-centric experiences.

- **Excitement**
  - These trips are all about the iconic sights and experiences – the big, exciting, must-sees.

MOTIVATIONS FOR DESIRE TO VISIT THE USA

1. Culture/historic attractions (museums, landmarks), 46%
2. Beaches/seaside attractions, 40%
3. Shopping, 38%

WHERE THEY BOOK THE TRAVEL TO THE USA

- #01 Virgin Holidays
- #02 Gold Medal Travel Group
- #03 Vacationspot
- #04 British Airways Holidays
- #05 Travel 2

WHERE THEY TRAVEL OUTSIDE THE USA

- #01 China
- #02 France
- #03 UK
- #04 Spain
- #05 Japan

WHERE THEY TRAVEL

- #01 Shanghai
- #02 Paris
- #03 London
- #04 Madrid
- #05 Tokyo

WHERE TO REACH THEM

- Influential advertising media channels
- Social media
- Digital publishers
- Online video
- Out of home

WEBSITES USED IN DESTINATION SELECTION

- Traveler review website
- General search engine
- Online travel agent (OTA)
- Airline website

DESTINATION SELECTION CHANNLES

- Computer or laptop
- Tablet
- Mobile phone

US VISITOR TRAVEL IN THE USA 2018

- Los Angeles
- New York City
- Orlando
- Las Vegas
- San Francisco

Average length of stay in the USA

**88%** FIRST TIME; **16.1 Days** REPEAT

WHERE THEY BOOK THE TRAVEL TO THE USA

- #01 Virgin Holidays
- #02 Gold Medal Travel Group
- #03 Vacationspot
- #04 British Airways Holidays
- #05 Travel 2

TOP 5 FINAL FLIGHT DESTINATIONS IN THE USA

- Los Angeles
- Las Vegas
- San Francisco
- Orlando
- New York City

SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/ARC IATA 2018

WHEN THEY BOOK & VISIT

- PEAK PLANNING MONTHS
  - July-January
  - August-February
  - September-March
  - October - April

- TOP 3 PEAK ARRIVAL MONTHS
  - July
  - August
  - September
  - October

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

1. Resting and relaxation
2. Seeing the world’s most unique attractions
3. Increasing my knowledge/understanding of other cultures

42% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

TRAVER PARTY:

1. Couples, 46%
2. Family w/ Kids, 31%
3. Solo, 14%