Brand USA 2020 Market Snapshots

As of January 31, 2020

AUSTRALIA

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WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 86.9%
2. Business, 12.3%
3. Students, 0.8%

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

TRAVEL PARTY:

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

39% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

#11 RANK IN ARRIVALS (2018)

#09 RANK IN SPENDING (2018)

$2,476 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

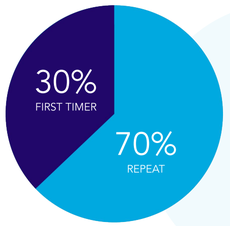
+3% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018, COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE
NTTO 2018 "MARKET PROFILE: AUSTRALIA." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018..

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS		TOP 3 PEAK ARRIVAL MONTHS
September-March	→	September
June-December	→	June
December-June	→	December

Most Australian travelers decide which destination to visit between 6 and 12 months before traveling there.



FIRST TIME: REPEAT

Average length of stay in the USA

19.3 Days

SOURCE: NTTO 2018 MARKET PROFILES AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

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.

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

Excitement

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

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA 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)

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- MOBILE PHONE
- TABLET

SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 INDONESIA
02 NEW ZEALAND
03 USA (7.2%)
04 U.K.
05 ITALY
06 SINGAPORE

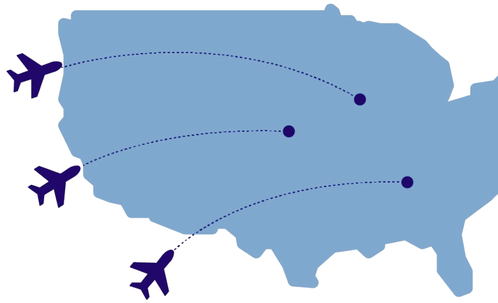
TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

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

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE AUSTRALIAN TRAVEL AGENCIES OUTBOUND TO THE USA

01 Flight Centre Travel Group
02 Helloworld Travel Services
03 Express Travel Group
04 Webjet Marketing
05 Expedia Australia



*Air Only
SOURCE: ARC/IATA 2018,.

BRAZIL

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WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 89.3%
2. Business, 8.2%
3. Student, 2.4%

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

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

TRAVEL PARTY:

1. Family w/ Kids, 44%
2. Couples, 39%
3. Solo, 17%

51% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

#07 RANK IN ARRIVALS (2018)

#07 RANK IN SPENDING (2018)

$1,981 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

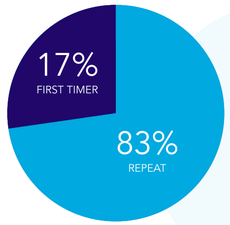
+16% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018, COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: BRAZIL." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
December-June	December
January-July	January
July-January	July

Most Brazilian travelers decide which destination to visit between 6 and 12 months before traveling there.



FIRST TIME: REPEAT

Average length of stay in the USA

16.1 Days

SOURCE: NTTO 2018 MARKET PROFILES AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

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.

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

Excitement

MOTIVATIONS FOR DESIRE TO VISIT THE USA

1. Shopping, 65%
2. Cultural/historical attractions (museums, landmarks), 59%
3. Theme Parks, 58%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- SOCIAL MEDIA
- DIGITAL PUBLISHERS
- ONLINE VIDEO (OLV)
- OUT OF HOME

WEBSITES USED IN DESTINATION SELECTION

- GENERAL SEARCH ENGINES
- TRAVELER REVIEW WEBSITE
- ONLINE TRAVEL AGENCY (OTA)
- AIRLINE WEBSITE

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- MOBILE PHONE
- TABLET

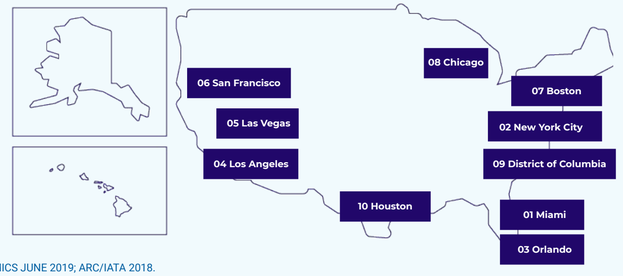
SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 USA (19.7%) 02 ARGENTINA 03 PORTUGAL 04 FRANCE 05 ITALY 06 CHILE

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

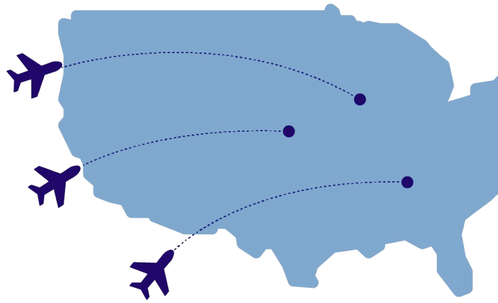


SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018.

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE BRAZILIAN TRAVEL AGENCIES OUTBOUND TO THE USA

01 Decolar.com
02 CVC Brasil Operadora e Agencia de Viagens
03 Esferatur Passagens e Turismo
04 Flytour Agencia de Viagens e Turismo
05 Picchioni Viagens e Turismo



*Air Only
SOURCE: ARC/IATA 2018.

CANADA

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WHO THEY ARE

TRAVEL PARTY:

1. Couples, 41%
2. Family w/ Kids, 30%
3. Solo, 17%

37% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

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

#01 RANK IN ARRIVALS (2018)

#02 RANK IN SPENDING (2018)

$980 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

-10% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018, COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE. CANADA INTERNATIONAL TRAVEL MARKET PROFILE 2018; U.S TRAVEL ASSOCIATION

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
March-May	August
February-April	July
October-December	March

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

Average length of stay in the USA

8 Days

SOURCE: STATISTICS CANADA 2015. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHY THEY VISIT THE USA

DOMINANT TRIP PERSONAS

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.

Favorite

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%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- SOCIAL MEDIA
- DIGITAL PUBLISHERS
- TV
- OUT OF HOME

WEBSITES USED IN DESTINATION SELECTION

- GENERAL SEARCH ENGINES
- TRAVELER REVIEW WEBSITE
- ONLINE TRAVEL AGENCY (OTA)
- AIRLINE WEBSITE

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- MOBILE PHONE
- TABLET

SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 USA (54.6%) 02 MEXICO 03 CUBA 04 FRANCE 05 ITALY 06 DOMINICAN

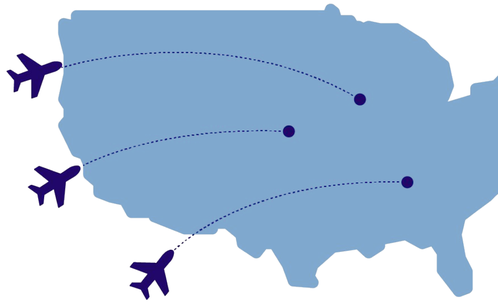
TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018. AIR ONLY.

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE CANADIAN TRAVEL AGENCIES OUTBOUND TO THE USA

01 Expedia
02 Tour East Holidays
03 Red Label Vacations
04 Westjet Vacations
05 GB Travel Canada



*Air Only
SOURCE: ARC/IATA 2018.

CHINA

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WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 68.1%
2. Students, 19.3%
3. Business, 12.6%

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

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

TRAVEL PARTY:

1. Couples, 49%
2. Family w/ Kids, 45%
3. Solo, 17%

56% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

#05 RANK IN ARRIVALS (2018)

#01 RANK IN SPENDING (2018)

$2,845 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

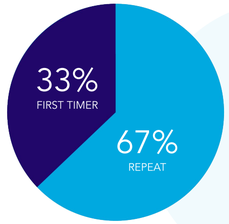
-6% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018, COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: CHINA." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
June-July	August
May-June	July
November-December	January

Most Chinese travelers decide which destination to visit between 1 and 2 months before traveling there.



FIRST TIME: REPEAT

Average length of stay in the USA

12 Days*

SOURCE: NTTO 2018 MARKET PROFILES AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
*Used median in lieu of mean for length of stay in China. The mean length of stay is skewed with high volume of family/friends stay numbers.

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.

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

Excitement

MOTIVATIONS FOR DESIRE TO VISIT THE USA
1. Cultural/historical attractions (museums, landmarks), 75%
2. Urban attractions (nightlife, city tours), 73%
3. Ecotourism and nature, 71%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- MAGAZINES
- SOCIAL MEDIA
- NEWS
- ONLINE VIDEO (OLV)

WEBSITES USED IN DESTINATION SELECTION

- ONLINE TRAVEL AGENCY (OTA)
- TRAVEL SEARCH ENGINES
- TRAVEL GUIDE WEBSITES
- GENERAL SEARCH ENGINES

DESTINATION SELECTION CHANNELS

- MOBILE PHONE
- COMPUTER OR LAPTOP
- TABLET

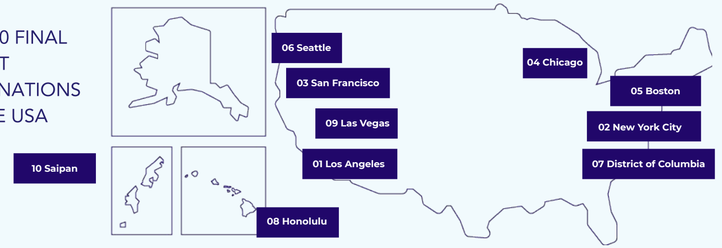
SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 THAILAND
02 JAPAN
03 SOUTH KOREA
04 VIETNAM
05 SINGAPORE
06 USA (3.0%)

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

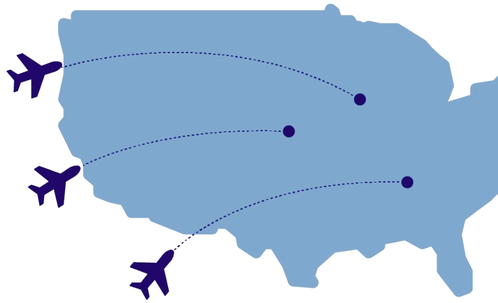


SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018.

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE CHINESE TRAVEL AGENCIES OUTBOUND TO THE USA

01 Ctrip
02 Huachen Southwest
03 Ever Bright Town
04 Merchants International Business
05 E-Fly Air Travel



*Air Only
SOURCE: ARC/IATA 2018.

FRANCE

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WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 83.2%
2. Business, 15.6%
3. Students, 1.2%

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

1. Increasing my knowledge/understanding of other cultures
2. Connecting with nature
3. Resting and relaxation

TRAVEL PARTY:

1. Couples, 42%
2. Family w/ Kids, 34%
3. Solo, 15%

41% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

#09 RANK IN ARRIVALS (2018)

#11 RANK IN SPENDING (2018)

$1,278 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

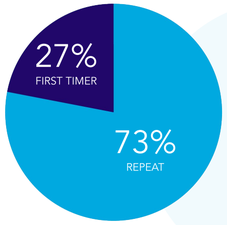
+6% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018, COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: FRANCE." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
February-April	July
November-January	April
March-May	August

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



FIRST TIME: REPEAT

Average length of stay in the USA

14.3 Days

SOURCE: NTTO 2018 MARKET PROFILES AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

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%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- TV
- SOCIAL MEDIA
- DIGITAL MAGAZINE
- MAGAZINE

WEBSITES USED IN DESTINATION SELECTION

- GENERAL SEARCH ENGINE
- TRAVELER REVIEW WEBSITE
- ONLINE TRAVEL AGENCY (OTA)
- AIRLINE WEBSITE

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- PRINTED GUIDEBOOK
- TABLET

SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 SPAIN
02 ITALY
03 U.K.
04 MOROCCO
05 GERMANY
07 USA (3.2%)

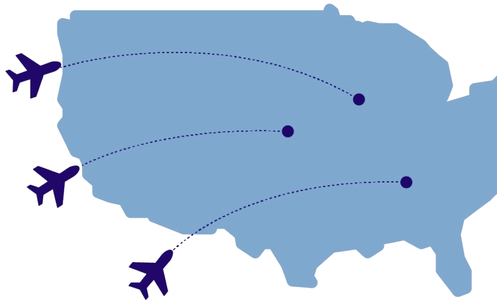
TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

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

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE FRENCH TRAVEL AGENCIES OUTBOUND TO THE USA

01 TUI France
02 Global Business Travel France
03 Mister Fly
04 CWT France
05 Egencia France



*Air Only
SOURCE: ARC/IATA 2018.

GERMANY

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WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

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

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

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

TRAVEL PARTY:

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

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

#08 RANK IN ARRIVALS (2018)

#10 RANK IN SPENDING (2018)

$1,407 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

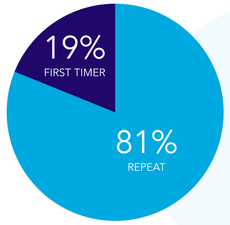
-1% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018 COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: GERMANY." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
December-February	May
April-June	September
May-July	October

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



FIRST TIME: REPEAT

Average length of stay in the USA

16.2 Days

SOURCE: NTTO 2018 MARKET PROFILES AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

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

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

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

SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 AUSTRIA
02 ITALY
03 FRANCE
04 SPAIN
05 NETHERLANDS
14 USA (1.8%)

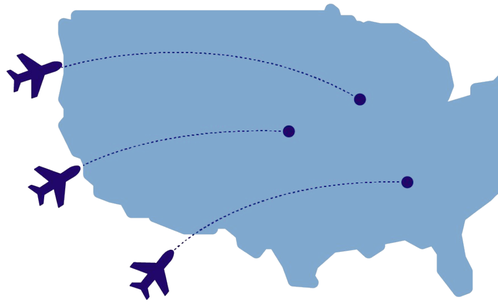
TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

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

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE GERMAN TRAVEL AGENCIES OUTBOUND TO THE USA

01 TUI Germany
02 Reisebueroservice
03 Egencia
04 AER Ticket
05 BCD Travel Germany



*Air Only
SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018.

INDIA

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WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 66.6%
2. Business, 20.7%
3. Students, 12.7%

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

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

TRAVEL PARTY:

1. Family w/ Kids, 50%
2. Couples, 27%
3. Solo, 19%

60% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

#10 RANK IN ARRIVALS (2018)

#06 RANK IN SPENDING (2018)

$2,074 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

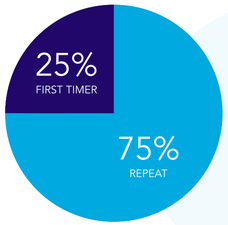
+7% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018 COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: INDIA." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
March-April	May
April-May	June
June-July	August

Most Indian travelers decide which destination to visit between 1 and 2 months before traveling there.



FIRST TIME: REPEAT

Average length of stay in the USA

15 Days*

SOURCE: NTTO 2018 MARKET PROFILES AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
*Used median in lieu of mean for length of stay in India. The mean length of stay is skewed with high volume of family/friends stay numbers.

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.

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

Excitement

MOTIVATIONS FOR DESIRE TO VISIT THE USA
1. Beaches/seaside attractions, 71%
2. Shopping, 66%
3. Urban attractions (nightlife, city tours), 64%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- SOCIAL MEDIA
- DIGITAL PUBLISHERS
- NEWS
- CINEMA

WEBSITES USED IN DESTINATION SELECTION

- ONLINE TRAVEL AGENCY (OTA)
- GENERAL SEARCH ENGINE
- TRAVELER REVIEW WEBSITE
- SOCIAL NETWORKING WEBSITE

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- MOBILE PHONE
- TRAVEL PROFESSIONAL ADVICE

SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 UAE
02 SAUDI ARABIA
03 THAILAND
04 BAHRAIN
05 USA (6.1%
06 SINGAPORE

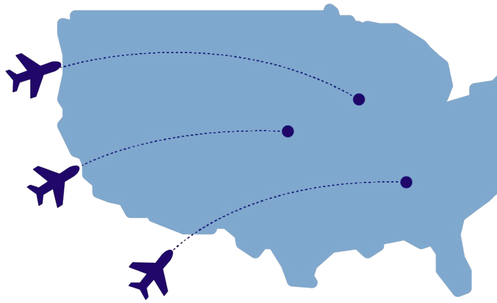
TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

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

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE INDIAN TRAVEL AGENCIES OUTBOUND TO THE USA

01 Riya Travel and Tours & Holidays
02 Akbar Travels of India
03 Make My Trip
04 CWT India
05 TEK Travels



*Air Only
SOURCE: ARC/IATA 2018.

JAPAN

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Brand USA

WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 84.5%
2. Business, 14.2%
3. Students, 1.3%

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. Family w/ Kids, 23%
2. Couples, 23%
3. Solo, 16%

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

#04 RANK IN ARRIVALS (2018)

#04 RANK IN SPENDING (2018)

$916 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

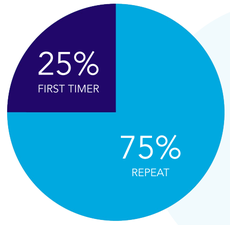
-3% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018 COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: JAPAN." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
October-December	March
February-April	August
April-June	September

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



FIRST TIME: REPEAT

Average length of stay in the USA

6.6 Days

SOURCE: NTTO 2018 MARKET PROFILES AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

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/gastronomy, 73%
2. Shopping, 56%
3. Cultural/historical attractions (museums, landmarks), 55%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- TV
- MAGAZINES
- SOCIAL MEDIA
- ONLINE VIDEO (OLV)

WEBSITES USED IN DESTINATION SELECTION

- GENERAL SEARCH ENGINE
- ONLINE TRAVEL AGENCY (OTA)
- AIRLINE WEBSITES
- TRAVELER REVIEW WEBSITE

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- PRINTED GUIDEBOOK
- MOBILE PHONES

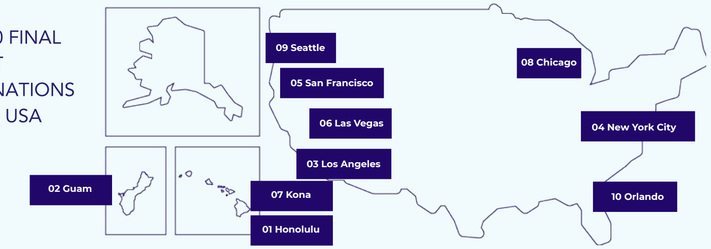
SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 CHINA
02 USA (14.0%)
03 SOUTH KOREA
04 THAILAND
05 VIETNAM
06 INDONESIA

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

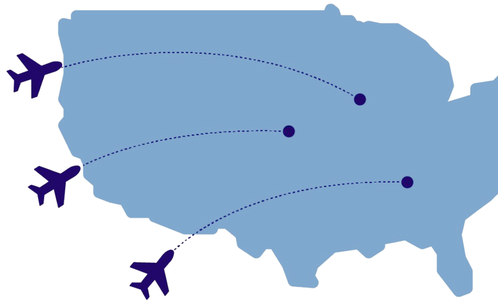


SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018.

WHERE THEY BOOK TRAVEL TO THE USA

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



*Air Only
SOURCE: ARC/IATA 2018.

MEXICO

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Brand USA

WHO THEY ARE

TRAVEL PARTY:

1. Family w/ Kids, 51%
2. Couples, 35%
3. Solo, 10%

40% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

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

#02 RANK IN ARRIVALS (2018)

#03 RANK IN SPENDING (2018)

$1,085 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

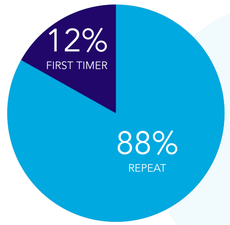
+10% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018 COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: MEXICO." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
November-January	April
June-August	November
July-September	Dcember

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



FIRST TIME: REPEAT

Average length of stay in the USA

12.3 Days*

*Mexico Air Only.
SOURCE: MARKET PROFILE: MEXICO." NTTO 2018. US Department of Commerce, NTTO/SIAT 2018.

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.

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

Excitement

MOTIVATIONS FOR DESIRE TO VISIT THE USA

1. Cultural/historical attractions (museums, landmarks), 61%
2. Shopping, 54%
3. Urban attractions (nightlife, city tours), 54%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- SOCIAL MEDIA
- ONLINE VIDEO (OLV)
- TV
- OUT OF HOME

WEBSITES USED IN DESTINATION SELECTION

- GENERAL SEARCH ENGINE
- TRAVELER REVIEW WEBSITE
- ONLINE TRAVEL AGENT (OTA)
- AIRLINE WEBSITES

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- MOBILE PHONE
- TABLET

SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 USA (83%) 02 FRANCE 03 SPAIN 04 CANADA 05 COLUMBIA 06 CUBA

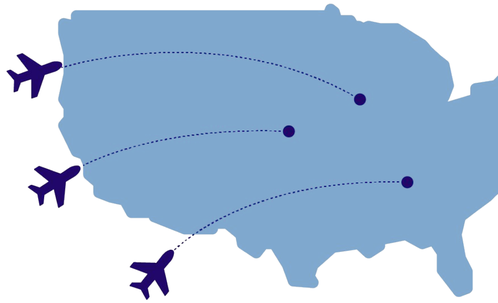
TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

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

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE MEXICAN TRAVEL AGENCIES OUTBOUND TO THE USA

01 Despegar.com
02 Corporate Travel Services
03 GBT Travel Services
04 Viajes Beda
05 BCD Travel



*Air Only
SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018.

SOUTH KOREA

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Brand USA

WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 87.8%
2. Business, 7.9%
3. Students, 4.3%

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. Couples, 31%
2. Family w/ Kids, 29%
3. Solo, 16%

29% OF INDIVIDUALS UNDER 35 WHO ARE LIKELY TO VISIT THE USA IN THE NEXT TWO YEARS

#06 RANK IN ARRIVALS (2018)

#08 RANK IN SPENDING (2018)

$1,233 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

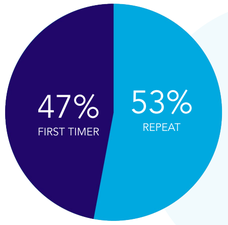
-5% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018 COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: SOUTH KOREA." US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
August-October	January
December-February	June
February-April	July

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



FIRST TIME: REPEAT

Average length of stay in the USA

5 Days*

*Used median in lieu of mean for length of stay in South Korea. The mean length of stay is skewed with high volume of family/friends stay numbers.
SOURCE: "MARKET PROFILE: SOUTH KOREA." NTTO 2018. US Department of Commerce, NTTO/SIAT 2018.

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.

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

Excitement

MOTIVATIONS FOR DESIRE TO VISIT THE USA

1. Cultural/historical attractions (museums, landmarks), 59%
2. Beaches/seaside attractions, 59%
3. Ecotourism and nature, 56%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- TV
- ONLINE VIDEO (OLV)
- SOCIAL
- OUT OF HOME

WEBSITES USED IN DESTINATION SELECTION

- GENERAL SEARCH ENGINE
- TRAVELER REVIEW WEBSITE
- ONLINE TRAVEL AGENT (OTA)
- SOCIAL NETWORKING WEBSITES

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- MOBILE PHONE
- TV/RADIO

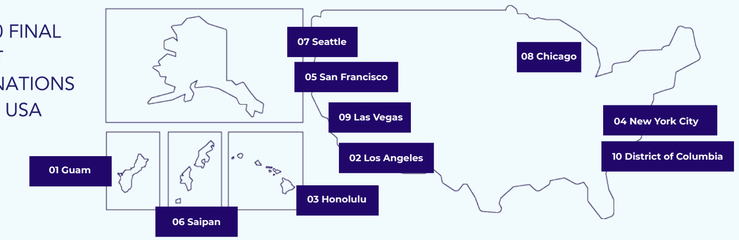
SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 JAPAN · 02 CHINA · 03 VIETNAM · 04 USA (7.0%) · 05 THAILAND · 06 PHILIPPINES

TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

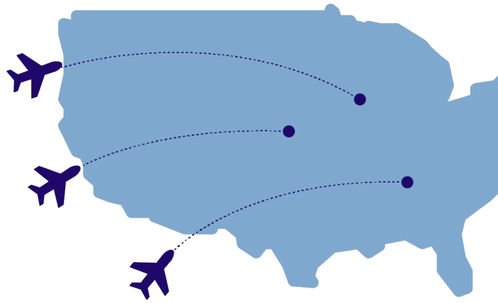


SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018.

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE SOUTH KOREAN TRAVEL AGENCIES OUTBOUND TO THE USA

01 Hana Tour Service
02 Modetour
03 Interpark
04 Yellow Balloon Tour
05 Tide Square



*Air Only
SOURCE: ARC/IATA 2018.

UNITED KINGDOM

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Brand USA

WHO THEY ARE

ARRIVALS TO THE USA BY VISA TYPE

1. Leisure, 82.7%
2. Business, 16.8%
3. Students, 0.6%

TOP 3 IMPORTANT PERSONAL CONSIDERATIONS WHEN SELECTING DESTINATION

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

TRAVEL PARTY:

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

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

#03 RANK IN ARRIVALS (2018)

#05 RANK IN SPENDING (2018)

$1,116 AVERAGE SPEND ON U.S. TRAVEL PER VISITOR PER TRIP (2018)

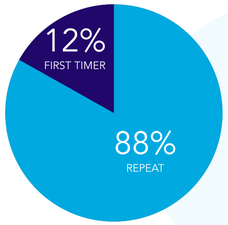
+4% YOY CHANGE IN ARRIVAL GROWTH (2018)

SOURCE: NTTO 2018 COR MONTHLY ARRIVALS DATA/I-94 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.
NTTO 2018 "MARKET PROFILE: UNITED KINGDOM". US DEPARTMENT OF COMMERCE, NTTO/SIAT 2018.

WHEN THEY BOOK & VISIT

PEAK PLANNING MONTHS	TOP 3 PEAK ARRIVAL MONTHS
July-January	July
August-February	August
September-March	September
October - April	October

Most British travelers decide which destination to visit between 6 and 12 months before traveling there.



FIRST TIME: REPEAT

Average length of stay in the USA

16.1 Days

SOURCE: MARKET PROFILE: UNITED KINGDOM." NTTO 2018. US Department of Commerce, NTTO/SIAT 2018.

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.

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), 46%
2. Beaches/seaside attractions, 40%
3. Shopping, 38%

SOURCE: PHOCUSWRIGHT, CUSTOM STUDY. PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE TO REACH THEM

INFLUENTIAL ADVERTISING MEDIA CHANNELS

- SOCIAL MEDIA
- DIGITAL PUBLISHERS
- ONLINE VIDEO (OLV)
- OUT OF HOME

WEBSITES USED IN DESTINATION SELECTION

- TRAVELER REVIEW WEBSITE
- GENERAL SEARCH ENGINE
- ONLINE TRAVEL AGENT (OTA)
- AIRLINE WEBSITE

DESTINATION SELECTION CHANNELS

- COMPUTER OR LAPTOP
- TABLET
- MOBILE PHONE

SOURCE: MEDIACOM WORLDWIDE LIVE PANEL, 2019 AND PHOCUSWRIGHT INC. 2019 MARKET INTELLIGENCE.

WHERE THEY TRAVEL

WHERE THEY TRAVEL OUTSIDE THE USA

01 SPAIN
02 FRANCE
03 ITALY
04 IRELAND
05 USA (5.1%)
06 GREECE

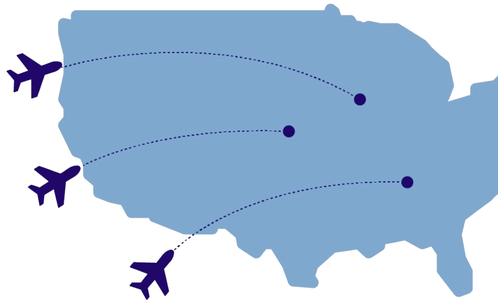
TOP 10 FINAL FLIGHT DESTINATIONS IN THE USA

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

WHERE THEY BOOK TRAVEL TO THE USA

TOP FIVE BRITISH TRAVEL AGENCIES OUTBOUND TO THE USA

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



*Air Only
SOURCE: OXFORD ECONOMICS JUNE 2019; ARC/IATA 2018.