Market Profiles

BRAND USA RESEARCH STUDY 2019
Brand USA Traveler Research

In the summer of 2013, Brand USA launched its Global Market Intelligence program in order to gain insight into travelers’ perceptions of the USA and its competitors, as well as general travel behaviors and preferences. As part of this program, we commissioned PhoCusWright, Inc. and Global Market Insite to conduct proprietary consumer research in 11 markets worldwide. Respondents were recruited from an online panel. For markets outside North America, the results reflect responses from adults who travel internationally for leisure.
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 54%
- Local lifestyle: 51%
- Shopping: 39%
- Dining/gastronomy: 35%
- Urban attractions: 34%

Top 5 Strongest Impressions of the USA

- Diverse: 39%
- Adventurous: 33%
- Friendly: 30%
- Arrogant: 29%
- Energetic: 25%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>DESTINATION DECISION</th>
<th>AIR BOOKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did/will not decide in advance</td>
<td>1 day or less/did not reserve in advance</td>
</tr>
<tr>
<td>1 day or less</td>
<td>2%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>3%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>5%</td>
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<tr>
<td>3 to 4 weeks</td>
<td>5%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>12%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>27%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>33%</td>
</tr>
<tr>
<td>More than one year</td>
<td>9%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>19%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>32%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>30%</td>
</tr>
<tr>
<td>More than one year</td>
<td>2%</td>
</tr>
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</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 58%
- Personal recommendations from family or friends: 37%
- Websites or applications via mobile phone: 27%
- Websites or applications via tablet: 22%
- Information in printed travel guidebooks: 22%
Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Less than $2,499</td>
<td>22%</td>
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<tr>
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<td>28%</td>
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<tr>
<td>$5,000-$7,499</td>
<td>19%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>15%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>16%</td>
</tr>
</tbody>
</table>

Expected Travel Party Size of Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Party Size</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 person</td>
<td>28%</td>
</tr>
<tr>
<td>2 people</td>
<td>39%</td>
</tr>
<tr>
<td>3 people</td>
<td>+5%</td>
</tr>
<tr>
<td>4 people</td>
<td>12%</td>
</tr>
<tr>
<td>5 people</td>
<td>15%</td>
</tr>
</tbody>
</table>

Months Traveled (March 2017–March 2019)

<table>
<thead>
<tr>
<th>Month</th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>18%</td>
<td>11%</td>
<td>15%</td>
<td>18%</td>
<td>19%</td>
<td>20%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Month</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
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<tbody>
<tr>
<td>21%</td>
<td>20%</td>
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<td>21%</td>
<td>18%</td>
<td>21%</td>
<td></td>
</tr>
</tbody>
</table>

Destination Interest—Top 10 States

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>54%</td>
</tr>
<tr>
<td>California</td>
<td>52%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>36%</td>
</tr>
<tr>
<td>Florida</td>
<td>27%</td>
</tr>
<tr>
<td>Alaska</td>
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<tr>
<td>Texas</td>
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</tr>
<tr>
<td>Washington</td>
<td>17%</td>
</tr>
<tr>
<td>Nevada</td>
<td>15%</td>
</tr>
<tr>
<td>Colorado</td>
<td>11%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>9%</td>
</tr>
</tbody>
</table>

Likelihood of Travel to USA

- Never likely to visit: 25%
- Maybe some time in the distant future: 9%
- In the next six months: 9%
- Six to twelve months: 12%
- One to two years: 20%
- Two to five years: 26%
- Two to five years: 25%

Net Promoter

- I would bring it up to recommend as a destination: 25%
- I would tell people positive things about it if it were brought up: 32%
- I would tell people neither positive nor negative things if it were brought up: 32%
- I would tell people negative things about it if it were brought up: 7%
- I would bring it up to discourage people from traveling there: 4%

Source: Brand USA Market Intelligence Study 2019
**Belgium**

**Top 5 Motivations for Selecting Last Intercontinental Destination**

- Cultural/historical attractions: 52%
- Local lifestyle: 44%
- Beaches/seaside attractions: 43%
- Ecotourism and nature: 38%
- Urban attractions: 33%

**Top 5 Strongest Impressions of the USA**

- Diverse: 40%
- Adventurous: 35%
- Trendy: 31%
- Energetic: 26%
- Arrogant: 25%

**Destination Decision and Air Booking Windows for Next Intercontinental Trip**

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<tr>
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<td>1 to 2 months</td>
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<tr>
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<td>29%</td>
</tr>
<tr>
<td>More than one year</td>
<td>More than one year</td>
</tr>
<tr>
<td>7%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Top 5 Channels Used in Destination Selection for Last Intercontinental Trip**

- Websites via computer or laptop: 55%
- Personal recommendations from family or friends: 35%
- Websites or applications via phone: 29%
- Websites or applications via tablet: 25%
- Information in printed travel guidebooks: 25%
### Expected Household Travel Spending for Next Intercontinental Trip

- **Less than $2,499**: 36%
- **$2,500-$4,999**: 37%
- **$5,000-$7,499**: 17%
- **$7,500-$9,999**: 5%
- **$10,000+**: 4%

### Expected Travel Party Size of Next Intercontinental Trip

- **26%**
- **48%**
- **13%**
- **11%**
- **3%**

### Months Traveled (March 2017–March 2019)

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<tr>
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### Destination Interest—Top 10 States

- **New York**: 50%
- **California**: 47%
- **Florida**: 37%
- **Hawaii**: 25%
- **Washington**: 18%
- **Texas**: 18%
- **Louisiana**: 15%
- **Alaska**: 14%
- **Colorado**: 12%
- **Arizona**: 12%

### Likelihood of Travel to USA

- Never likely to visit: 14%
- Maybe some time in the distant future: 29%
- One to two years: 17%
- Six to twelve months: 8%
- In the next six months: 6%
- I would bring it up to recommend as a destination: 34%
- I would tell people positive things about it if it were brought up: 27%
- I would tell people neither positive nor negative things if it were brought up: 29%
- I would tell people negative things about it if it were brought up: 6%
- I would bring it up to discourage people from traveling there: 5%

Source: Brand USA Market Intelligence Study 2019
Brazil

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 58%
- Local lifestyle: 53%
- Shopping: 53%
- Dining/gastronomy: 49%
- Urban attractions: 48%

Top 5 Strongest Impressions of the USA

- Diverse: 45%
- Sophisticated: 39%
- Down-to-earth: 35%
- Creative: 34%
- Energetic: 31%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

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</tr>
<tr>
<td>6 to 12 months</td>
<td>2%</td>
</tr>
<tr>
<td>More than one year</td>
<td>2%</td>
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Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 64%
- Websites or applications via mobile phone: 51%
- Personal recommendations from family or friends: 40%
- Websites or applications via tablet: 30%
- Personal advice from travel professionals/travel agents: 27%
### Expected Household Travel Spending for Next Intercontinental Trip

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<tr>
<td>$10,000+</td>
<td>11%</td>
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### Expected Travel Party Size of Next Intercontinental Trip

- 16%: Single
- 39%: Couples
- 17%: Triple
- 7%: Family
- 20%: Group

### Months Traveled (March 2017–March 2019)

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<td>13%</td>
</tr>
<tr>
<td>DEC</td>
<td>28%</td>
</tr>
</tbody>
</table>

### Destination Interest—Top 10 States

- New York: 51%
- Florida: 50%
- California: 50%
- Hawaii: 25%
- Texas: 18%
- Washington: 17%
- Nevada: 11%
- Alaska: 10%
- New Jersey: 9%
- Massachusetts: 9%

### Likelihood of Travel to USA

- Never likely to visit: 2%
- Maybe some time in the distant future: 8%
- One to two years: 22%
- Six to twelve months: 28%
- Two to five years: 14%
- In the next six months: 28%

### Net Promoter

- I would bring it up to recommend as a destination: 62%
- I would tell people positive things about it if it were brought up: 24%
- I would tell people neither positive nor negative things if it were brought up: 9%
- I would tell people negative things about it if it were brought up: 4%
- I would bring it up to discourage people from traveling there: 2%

Source: Brand USA Market Intelligence Study 2019
Canada

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 50%
- Beaches/seaside attractions: 49%
- Local lifestyle: 44%
- Dining/gastronomy: 39%
- Urban attractions: 31%

Top 5 Strongest Impressions of the USA

- Diverse: 33%
- Arrogant: 30%
- Adventurous: 29%
- Friendly: 25%
- Energetic: 23%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

- I did/will not decide in advance: 3%
- 1 day or less: 2%
- 1 to 2 weeks: 4%
- 2 to 6 days: 6%
- 3 to 4 weeks: 8%
- 1 to 2 months: 18%
- 3 to 5 months: 32%
- 6 to 12 months: 22%
- More than one year: 5%

**AIR BOOKING**

- 1 day or less/did not reserve in advance: 1%
- 1 to 2 weeks: 7%
- 3 to 4 weeks: 11%
- 1 to 2 months: 27%
- 3 to 5 months: 34%
- 6 to 12 months: 15%
- More than one year: 1%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 59%
- Personal recommendations from family or friends: 40%
- Websites or applications via mobile phone: 28%
- Websites or applications via tablet: 28%
- Personal advice from travel professionals/travel agents: 19%
### Expected Household Travel Spending for Next Intercontinental Trip

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<tr>
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### Destination Interest—Top 10 States

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<th>State</th>
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<td>Nevada</td>
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<td>Alaska</td>
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</tr>
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<td>Arizona</td>
<td>11%</td>
</tr>
<tr>
<td>Washington</td>
<td>10%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>9%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

- 27%: 1 person
- 46%: 2-4 people
- 11%: 5+ people

### Likelihood of Travel to USA

- Never likely to visit: 3%
- In the next six months: 40%
- Maybe some time in the distant future: 9%
- One to two years: 15%
- Two to five years: 8%

### Net Promoter

- I would bring it up to recommend as a destination: 30%
- I would tell people positive things about it if it were brought up: 31%
- I would tell people neither positive nor negative things if it were brought up: 27%
- I would tell people negative things about it if it were brought up: 8%
- I would bring it up to discourage people from traveling there: 4%

Source: Brand USA Market Intelligence Study 2019
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 69%
- Ecotourism and nature: 65%
- Urban attractions: 62%
- Dining/gastronomy: 58%
- Beaches/seaside attractions: 56%

Top 5 Strongest Impressions of the USA

- Diverse: 55%
- Open-minded: 45%
- Energetic: 45%
- Creative: 35%
- Adventurous: 29%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

- I did/will not decide in advance: 1%
- 1 day or less: 2%
- 2 to 6 days: 10%
- 1 to 2 weeks: 15%
- 3 to 4 weeks: 17%
- 1 to 2 months: 36%
- 3 to 5 months: 16%
- 6 to 12 months: 4%
- More than one year: 0%

**AIR BOOKING**

- 1 day or less/did not reserve in advance: 3%
- 2 to 6 days: 15%
- 1 to 2 weeks: 22%
- 3 to 4 weeks: 24%
- 1 to 2 months: 27%
- 3 to 5 months: 8%
- 6 to 12 months: 2%
- More than one year: 0%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites or applications via mobile phone: 60%
- Websites via computer or laptop: 57%
- Personal recommendations from family or friends: 52%
- Personal advice from travel professionals/travel agents: 43%
- Websites or applications via tablet: 37%
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Expected Travel Party Size of Next Intercontinental Trip

- 17% 7%
- 36%+
- 38%

Months Traveled (March 2017–March 2019)

- JAN: 14%
- FEB: 16%
- MAR: 12%
- APR: 13%
- MAY: 29%
- JUN: 18%
- JUL: 26%
- AUG: 24%
- SEP: 16%
- OCT: 40%
- NOV: 10%
- DEC: 11%

Destination Interest—Top 10 States

- California: 47%
- Hawaii: 46%
- New York: 35%
- Alaska: 27%
- Florida: 22%
- Washington: 22%
- District of Columbia: 19%
- Pennsylvania: 12%
- Texas: 12%
- Mississippi: 11%

Likelihood of Travel to USA

- Never likely to visit: 1%
- In the next six months: 24%
- Six to twelve months: 26%
- One to two years: 23%
- Two to five years: 18%
- Maybe some time in the distant future: 9%

Net Promoter

- I would bring it up to recommend as a destination: 35%
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- I would tell people neither positive nor negative things if it were brought up: 24%
- I would tell people negative things about it if it were brought up: 5%
- I would bring it up to discourage people from traveling there: 1%

Source: Brand USA Market Intelligence Study 2019
Top 5 Motivations for Selecting Last Intercontinental Destination

- Local lifestyle: 55%
- Cultural/historical attractions: 51%
- Urban attractions: 41%
- Ecotourism and nature: 40%
- Dining/gastronomy: 39%

Top 5 Strongest Impressions of the USA

- Diverse: 41%
- Adventurous: 28%
- Trendy: 27%
- Forward-thinking: 25%
- Open-minded: 22%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**
- I did/will not decide in advance: 3%
- 1 day or less: 3%
- 2 to 6 days: 5%
- 1 to 2 weeks: 6%
- 3 to 4 weeks: 6%
- 1 to 2 months: 18%
- 3 to 5 months: 32%
- 6 to 12 months: 22%
- More than one year: 6%

**AIR BOOKING**
- 1 day or less/did not reserve in advance: 3%
- 2 to 6 days: 3%
- 1 to 2 weeks: 6%
- 3 to 4 weeks: 12%
- 1 to 2 months: 23%
- 3 to 5 months: 34%
- 6 to 12 months: 18%
- More than one year: 2%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 49%
- Personal recommendations from family or friends: 35%
- Information in printed travel guidebooks: 29%
- Websites or applications via mobile phone: 23%
- Websites or applications via tablet: 23%
**Expected Household Travel Spending for Next Intercontinental Trip**

- Less than $2,499: 41%
- $2,500-$4,999: 34%
- $5,000-$7,499: 15%
- $7,500-$9,999: 6%
- $10,000+: 4%

**Expected Travel Party Size of Next Intercontinental Trip**

- 1 person: 22%
- 2-3 persons: 47%
- 4-6 persons: 12%
- 7-10 persons: 4%
- 11 or more persons: 15%

**Months Traveled (March 2017–March 2019)**

<table>
<thead>
<tr>
<th>Month</th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>14%</td>
<td>18%</td>
<td>18%</td>
<td>21%</td>
<td>20%</td>
<td>21%</td>
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<tr>
<td>JUL</td>
<td></td>
<td>29%</td>
<td>34%</td>
<td>19%</td>
<td>16%</td>
<td>12%</td>
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<tr>
<td>AUG</td>
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<tr>
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<tr>
<td>DEC</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Destination Interest—Top 10 States**

- California: 48%
- New York: 45%
- Florida: 31%
- Hawaii: 21%
- Texas: 20%
- Louisiana: 19%
- Washington: 17%
- Colorado: 15%
- Mississippi: 12%
- Alaska: 11%

**Likelihood of Travel to USA**

- Never likely to visit: 23%
- In the next six months: 9%
- Six to twelve months: 12%
- One to two years: 19%
- Two to five years: 27%
- Maybe some time in the distant future: 27%

**Net Promoter**

- I would bring it up to recommend as a destination: 38%
- I would tell people positive things about it if it were brought up: 26%
- I would tell people neither positive nor negative things if it were brought up: 29%
- I would tell people negative things about it if it were brought up: 5%
- I would bring it up to discourage people from traveling there: 2%

Source: Brand USA Market Intelligence Study 2019
Germany

Top 5 Motivations for Selecting Last Intercontinental Destination

- Dining/gastronomy: 36%
- Cultural/historical attractions: 34%
- Ecotourism and nature: 34%
- Urban attractions: 32%
- Shopping: 31%

Top 5 Strongest Impressions of the USA

- Diverse: 49%
- Adventurous: 39%
- Energetic: 29%
- Forward-thinking: 28%
- Friendly: 26%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Destination Decision</th>
<th>Air Booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did/will not decide in advance</td>
<td>1 day or less/did not reserve in advance</td>
</tr>
<tr>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>1 day or less</td>
<td>2 to 6 days</td>
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<tr>
<td>1%</td>
<td>3%</td>
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<tr>
<td>2 to 6 days</td>
<td>1 to 2 weeks</td>
</tr>
<tr>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>3 to 4 weeks</td>
</tr>
<tr>
<td>6%</td>
<td>10%</td>
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<tr>
<td>3 to 4 weeks</td>
<td>1 to 2 months</td>
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<tr>
<td>7%</td>
<td>21%</td>
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<tr>
<td>1 to 2 months</td>
<td>3 to 5 months</td>
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<tr>
<td>15%</td>
<td>37%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>6 to 12 months</td>
</tr>
<tr>
<td>34%</td>
<td>19%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>More than one year</td>
</tr>
<tr>
<td>22%</td>
<td>1%</td>
</tr>
<tr>
<td>More than one year</td>
<td></td>
</tr>
<tr>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 54%
- Personal recommendations from family or friends: 37%
- Information in printed travel guidebooks: 27%
- Personal advice from travel professionals/travel agents: 21%
- Websites or applications via tablet: 20%
### Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>33%</td>
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<tr>
<td>$2,500-$4,999</td>
<td>36%</td>
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<tr>
<td>$5,000-$7,499</td>
<td>16%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>8%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Size</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>1-2 persons</td>
<td>28%</td>
</tr>
<tr>
<td>3-5 persons</td>
<td>51%</td>
</tr>
<tr>
<td>6+ persons</td>
<td>8%</td>
</tr>
<tr>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

### Months Traveled (March 2017–March 2019)

<table>
<thead>
<tr>
<th>Month</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22%</td>
<td>16%</td>
<td>20%</td>
<td>21%</td>
<td>26%</td>
<td>25%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Month</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>29%</td>
<td>31%</td>
<td>31%</td>
<td>23%</td>
<td>14%</td>
<td>14%</td>
</tr>
</tbody>
</table>

### Destination Interest—Top 10 States

- California: 48%
- New York: 41%
- Florida: 40%
- Hawaii: 32%
- Texas: 20%
- Alaska: 17%
- Arizona: 14%
- Washington: 11%
- Nevada: 11%
- Colorado: 10%

### Likelihood of Travel to USA

- Never likely to visit: 25%
- Six to twelve months: 15%
- One to two years: 19%
- Maybe some time in the distant future: 24%
- In the next six months: 7%

### Net Promoter

- I would bring it up to recommend as a destination: 33%
- I would tell people positive things about it if it were brought up: 24%
- I would tell people neither positive nor negative things if it were brought up: 30%
- I would tell people negative things about it if it were brought up: 7%
- I would bring it up to discourage people from traveling there: 6%

Source: Brand USA Market Intelligence Study 2019
### Top 5 Motivations for Selecting Last Intercontinental Destination

- **Beaches/seaside attractions**: 64%
- **Shopping**: 57%
- **Urban Attractions**: 54%
- **Cultural/historical attractions**: 52%
- **Local lifestyle**: 51%

### Top 5 Strongest Impressions of the USA

- **Friendly**: 46%
- **Energetic**: 46%
- **Open-minded**: 42%
- **Trendy**: 40%
- **Adventurous**: 40%

### Destination Decision and Air Booking Windows for Next Intercontinental Trip

#### DESTINATION DECISION
- I did/will not decide in advance: 1%
- 1 day or less: 3%
- 2 to 6 days: 13%
- 1 to 2 weeks: 13%
- 3 to 4 weeks: 13%
- 1 to 2 months: 29%
- 3 to 5 months: 21%
- 6 to 12 months: 6%
- More than one year: 1%

#### AIR BOOKING
- 1 day or less/did not reserve in advance: 1%
- 2 to 6 days: 13%
- 1 to 2 weeks: 14%
- 3 to 4 weeks: 18%
- 1 to 2 months: 30%
- 3 to 5 months: 22%
- 6 to 12 months: 3%
- More than one year: 0%

### Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- **Websites via computer or laptop**: 60%
- **Websites or applications via mobile phone**: 52%
- **Personal recommendations from family or friends**: 44%
- **Online advertising/email**: 41%
- **Websites or applications via tablet**: 37%
### Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>33%</td>
</tr>
<tr>
<td>$2,500-$4,999</td>
<td>27%</td>
</tr>
<tr>
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<td>14%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>13%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>13%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

- Less than 3 people: 14%
- 3-4 people: 27%
- 5-6 people: 27%
- 7 or more people: 9%
- $10,000+: 27%

### Months Traveled (March 2017–March 2019)

- January: 31%
- February: 17%
- March: 24%
- April: 27%
- May: 32%
- June: 26%
- July: 17%
- August: 19%
- September: 18%
- October: 23%
- November: 22%
- December: 24%

### Destination Interest—Top 10 States

- New York: 50%
- California: 49%
- Hawaii: 33%
- Texas: 27%
- Alaska: 27%
- Washington: 27%
- Florida: 27%
- New Jersey: 24%
- Maryland: 13%
- Mississippi: 12%

### Likelihood of Travel to USA

- Never likely to visit: 2%
- In the next six months: 19%
- Six to twelve months: 25%
- One to two years: 29%
- Two to five years: 16%
- Maybe some time in the distant future: 10%

### Net Promoter

- I would bring it up to recommend as a destination: 52%
- I would tell people positive things about it if it were brought up: 32%
- I would tell people neither positive nor negative things if it were brought up: 12%
- I would tell people negative things about it if it were brought up: 3%
- I would bring it up to discourage people from traveling there: 2%

Source: Brand USA Market Intelligence Study 2019
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 55%
- Local lifestyle: 49%
- Beaches/seaside attractions: 44%
- Ecotourism and nature: 40%
- Urban attractions: 35%

Top 5 Strongest Impressions of the USA

- Forward-thinking: 38%
- Energetic: 36%
- Trendy: 31%
- Adventurous: 30%
- Unexpected: 29%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

### DESTINATION DECISION

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did/will not decide in advance</td>
<td>5%</td>
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<tr>
<td>1 day or less</td>
<td>1%</td>
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<td>2 to 6 days</td>
<td>3%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>5%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>7%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>19%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>37%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>22%</td>
</tr>
<tr>
<td>More than one year</td>
<td>3%</td>
</tr>
</tbody>
</table>

### AIR BOOKING

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day or less/did not reserve in advance</td>
<td>0%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>2%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>3%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>11%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>23%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>39%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>20%</td>
</tr>
<tr>
<td>More than one year</td>
<td>2%</td>
</tr>
</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 55%
- Personal recommendations from family or friends: 34%
- Websites or applications via mobile phone: 31%
- Information in printed travel guidebooks: 28%
- Personal advice from travel professionals/travel agents: 24%
Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499: 31%
- $2,500-$4,999: 37%
- $5,000-$7,499: 18%
- $7,500-$9,999: 8%
- $10,000+: 7%

Expected Travel Party Size of Next Intercontinental Trip

- 19%
- 45%
- 15%
- 3%
- 18%

Months Traveled (March 2017–March 2019)

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>12%</td>
<td>15%</td>
<td>19%</td>
<td>19%</td>
<td>27%</td>
<td>32%</td>
<td>36%</td>
<td>26%</td>
<td>13%</td>
<td>10%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Destination Interest—Top 10 States

- California: 50%
- New York: 45%
- Florida: 31%
- Hawaii: 28%
- Texas: 20%
- Washington: 18%
- Colorado: 14%
- Alaska: 13%
- Arizona: 12%
- Nevada: 11%

Likelihood of Travel to USA

- Never likely to visit: 3%
- Maybe some time in the distant future: 17%
- One to two years: 23%
- Two to five years: 23%
- Six to twelve months: 19%
- In the next six months: 14%
- Maybe some time in the distant future: 3%

Net Promoter

- I would bring it up to recommend as a destination: 43%
- I would tell people positive things about it if it were brought up: 34%
- I would tell people neither positive nor negative things if it were brought up: 18%
- I would tell people negative things about it if it were brought up: 4%
- I would bring it up to discourage people from traveling there: 1%
Top 5 Motivations for Selecting Last Intercontinental Destination

- Dining/gastronomy: 65%
- Cultural/historical attractions: 56%
- Shopping: 45%
- Local lifestyle: 32%
- Beaches/seaside attractions: 31%

Top 5 Strongest Impressions of the USA

- Diverse: 48%
- Energetic: 47%
- Friendly: 32%
- Optimistic: 23%
- Adventurous: 21%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>DESTINATION DECISION</th>
<th>AIR BOOKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did/will not decide in advance 5%</td>
<td>1 day or less/did not reserve in advance 1%</td>
</tr>
<tr>
<td>1 day or less 1%</td>
<td>2 to 6 days 2%</td>
</tr>
<tr>
<td>2 to 6 days 4%</td>
<td>1 to 2 weeks 9%</td>
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<td>1 to 2 weeks 4%</td>
<td>3 to 4 weeks 13%</td>
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<tr>
<td>3 to 4 weeks 5%</td>
<td>1 to 2 months 33%</td>
</tr>
<tr>
<td>1 to 2 months 28%</td>
<td>3 to 5 months 30%</td>
</tr>
<tr>
<td>3 to 5 months 38%</td>
<td>6 to 12 months 10%</td>
</tr>
<tr>
<td>6 to 12 months 15%</td>
<td>More than one year 1%</td>
</tr>
<tr>
<td>More than one year 2%</td>
<td></td>
</tr>
</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 63%
- Information in printed travel guidebooks: 39%
- Websites or applications via mobile phone: 34%
- Printed publications, articles or brochures: 32%
- Websites or applications via tablet: 32%
### Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>25%</td>
</tr>
<tr>
<td>$2,500-$4,999</td>
<td>42%</td>
</tr>
<tr>
<td>$5,000-$7,499</td>
<td>17%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>7%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>10%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

- 22%: 1 person
- 44%: 2-3 people
- 11%: 4-5 people
- 4%: 6 people or more
- 19%: 7 people or more

### Months Traveled (March 2017–March 2019)

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>22%</td>
</tr>
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<td>12%</td>
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<td>Sep</td>
<td>17%</td>
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<td>Oct</td>
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<tr>
<td>Nov</td>
<td>14%</td>
</tr>
<tr>
<td>Dec</td>
<td>24%</td>
</tr>
</tbody>
</table>

### Destination Interest—Top 10 States

- Hawaii: 53%
- New York: 48%
- California: 44%
- Florida: 27%
- Washington: 17%
- Alaska: 11%
- Texas: 9%
- Massachusetts: 9%
- Arizona: 9%
- Oregon: 7%

### Likelihood of Travel to USA

- Never likely to visit: 20%
- In the next six months: 20%
- Six to twelve months: 16%
- One to two years: 21%
- Two to five years: 19%
- Maybe some time in the distant future: 5%

### Net Promoter

- I would bring it up to recommend as a destination: 41%
- I would tell people positive things about it if it were brought up: 38%
- I would tell people neither positive nor negative things if it were brought up: 17%
- I would tell people negative things about it if it were brought up: 3%
- I would bring it up to discourage people from traveling there: 1%

Source: Brand USA Market Intelligence Study 2019
Korea

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 56%
- Beaches/seaside attractions: 52%
- Ecotourism and nature: 52%
- Urban attractions: 48%
- Dining/gastronomy: 46%

Top 5 Strongest Impressions of the USA

- Open-minded: 54%
- Diverse: 51%
- Energetic: 49%
- Sophisticated: 27%
- Down-to-earth: 25%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>DESTINATION DECISION</th>
<th>AIR BOOKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did/will not decide in advance</td>
<td>1 day or less/did not reserve in advance</td>
</tr>
<tr>
<td>1 day or less</td>
<td>2%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>1%</td>
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<tr>
<td>1 to 2 weeks</td>
<td>3%</td>
</tr>
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<td>3 to 4 weeks</td>
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<td>35%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>13%</td>
</tr>
<tr>
<td>More than one year</td>
<td>0%</td>
</tr>
</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 65%
- Websites or applications via mobile phone: 47%
- Personal recommendations from family or friends: 44%
- Programs on TV/Radio: 28%
- Personal advice from travel professionals/travel agents: 26%
### Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>16%</td>
</tr>
<tr>
<td>$2,500-$4,999</td>
<td>42%</td>
</tr>
<tr>
<td>$5,000-$7,499</td>
<td>22%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>11%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>8%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

- Less than 3 people: 23%
- 3-5 people: 37%
- 6-9 people: 18%
- 10+ people: 3%
- 1 person: 17%

### Months Traveled (March 2017–March 2019)

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN</td>
<td>19%</td>
</tr>
<tr>
<td>FEB</td>
<td>16%</td>
</tr>
<tr>
<td>MAR</td>
<td>18%</td>
</tr>
<tr>
<td>APR</td>
<td>12%</td>
</tr>
<tr>
<td>MAY</td>
<td>22%</td>
</tr>
<tr>
<td>JUN</td>
<td>17%</td>
</tr>
<tr>
<td>JUL</td>
<td>22%</td>
</tr>
<tr>
<td>AUG</td>
<td>27%</td>
</tr>
<tr>
<td>SEP</td>
<td>19%</td>
</tr>
<tr>
<td>OCT</td>
<td>23%</td>
</tr>
<tr>
<td>NOV</td>
<td>15%</td>
</tr>
<tr>
<td>DEC</td>
<td>20%</td>
</tr>
</tbody>
</table>

### Destination Interest—Top 10 States

1. New York: 60%
2. Hawaii: 53%
3. California: 52%
4. Washington: 26%
5. Florida: 23%
6. Alaska: 17%
7. Texas: 15%
8. Arizona: 9%
9. New Jersey: 8%
10. Virginia: 8%

### Likelihood of Travel to USA

- Never likely to visit: 2%
- In the next six months: 11%
- Six to twelve months: 16%
- One to two years: 24%
- Two to five years: 30%
- Maybe some time in the distant future: 17%

### Net Promoter

- I would bring it up to recommend as a destination: 43%
- I would tell people positive things about it if it were brought up: 37%
- I would tell people neither positive nor negative things if it were brought up: 17%
- I would tell people negative things about it if it were brought up: 2%
- I would bring it up to discourage people from traveling there: 0%

Source: Brand USA Market Intelligence Study 2019
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 61%
- Dining/gastronomy: 51%
- Urban attractions: 49%
- Local lifestyle: 45%
- Shopping: 43%

Top 5 Strongest Impressions of the USA

- Diverse: 49%
- Trendy: 38%
- Adventurous: 34%
- Down-to-earth: 33%
- Open-minded: 30%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>DESTINATION DECISION</th>
<th>AIR BOOKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did/will not decide in advance</td>
<td>1 day or less/did not reserve in advance</td>
</tr>
<tr>
<td>1 day or less</td>
<td>1 day or less/did not reserve in advance</td>
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<tr>
<td>1 to 2 weeks</td>
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</tr>
<tr>
<td>3 to 4 weeks</td>
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</tr>
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</tr>
<tr>
<td>6 to 12 months</td>
<td>6 to 12 months</td>
</tr>
<tr>
<td>More than one year</td>
<td>More than one year</td>
</tr>
</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 69%
- Websites or applications via mobile phone: 47%
- Personal recommendations from family or friends: 43%
- Websites or applications via tablet: 39%
- Online advertising/email: 22%
### Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>42%</td>
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<td>36%</td>
</tr>
<tr>
<td>$5,000-$7,499</td>
<td>14%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>4%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>4%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

- 19% for 1 person
- 30% for 2 or 3 persons
- 21% for 4 or more persons

### Months Traveled (March 2017–March 2019)

- JAN: 14%
- FEB: 7%
- MAR: 17%
- APR: 20%
- MAY: 16%
- JUN: 20%
- JUL: 30%
- AUG: 21%
- SEP: 17%
- OCT: 15%
- NOV: 15%
- DEC: 33%

### Destination Interest—Top 10 States

- California: 50%
- New York: 46%
- Florida: 34%
- Hawaii: 22%
- Texas: 21%
- Nevada: 15%
- Washington: 14%
- Alaska: 11%
- Illinois: 8%
- Colorado: 7%

### Likelihood of Travel to USA

- Never likely to visit: 5%
- In the next six months: 49%
- One to two years: 13%
- Six to twelve months: 25%
- Two to five years: 5%
- Maybe some time in the distant future: 5%

### Net Promoter

- I would bring it up to recommend as a destination: 47%
- I would tell people positive things about it if it were brought up: 27%
- I would tell people neither positive nor negative things if it were brought up: 18%
- I would tell people negative things about it if it were brought up: 5%
- I would bring it up to discourage people from traveling there: 4%

*Source: Brand USA Market Intelligence Study 2019*
**Netherlands**

**Top 5 Motivations for Selecting Last Intercontinental Destination**

- Cultural/historical attractions: 53%
- Beaches/seaside attractions: 42%
- Ecotourism and nature: 40%
- Local lifestyle: 34%
- Urban attractions: 30%

**Top 5 Strongest Impressions of the USA**

- Adventurous: 49%
- Diverse: 46%
- Trendy: 28%
- Energetic: 27%
- Friendly: 27%

**Destination Decision and Air Booking Windows for Next Intercontinental Trip**

**DESTINATION DECISION**

- I did/will not decide in advance: 5%
- 1 day or less: 1%
- 2 to 6 days: 3%
- 1 to 2 weeks: 6%
- 3 to 4 weeks: 7%
- 1 to 2 months: 16%
- 3 to 5 months: 32%
- 6 to 12 months: 24%
- More than one year: 5%

**AIR BOOKING**

- 1 day or less/did not reserve in advance: 1%
- 2 to 6 days: 2%
- 1 to 2 weeks: 4%
- 3 to 4 weeks: 9%
- 1 to 2 months: 23%
- 3 to 5 months: 38%
- 6 to 12 months: 22%
- More than one year: 1%

**Top 5 Channels Used in Destination Selection for Last Intercontinental Trip**

- Websites via computer or laptop: 63%
- Personal recommendations from family or friends: 33%
- Websites or applications via mobile phone: 28%
- Websites or applications via tablet: 27%
- Information in printed travel guidebooks: 20%
### Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
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</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
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<td>8%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>9%</td>
</tr>
</tbody>
</table>

### Months Traveled (March 2017–March 2019)

- **January**: 24%
- **February**: 19%
- **March**: 22%
- **April**: 21%
- **May**: 29%
- **June**: 26%
- **July**: 35%
- **August**: 36%
- **September**: 28%
- **October**: 23%
- **November**: 14%
- **December**: 20%

### Expected Travel Party Size of Next Intercontinental Trip

- **1 person**: 26%
- **2 people**: 50%
- **3 people or more**: 10% + 4%
- **11%**

### Destination Interest—Top 10 States

- **California**: 45%
- **New York**: 41%
- **Florida**: 34%
- **Hawaii**: 26%
- **Texas**: 18%
- **Washington**: 14%
- **Alaska**: 13%
- **Nevada**: 11%
- **Arizona**: 11%
- **Colorado**: 9%

### Likelihood of Travel to USA

- **Never likely to visit**: 12%
- **In the next six months**: 8%
- **Six to twelve months**: 9%
- **One to two years**: 15%
- **Two to five years**: 27%
- **Maybe some time in the distant future**: 29%

### Net Promoter

- **I would bring it up to recommend as a destination**: 32%
- **I would tell people positive things about it if it were brought up**: 28%
- **I would tell people neither positive nor negative things if it were brought up**: 28%
- **I would tell people negative things about it if it were brought up**: 8%
- **I would bring it up to discourage people from traveling there**: 5%

Source: Brand USA Market Intelligence Study 2019
Spain

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 63%
- Local lifestyle: 54%
- Dining/gastronomy: 44%
- Beaches/seaside attractions: 41%
- Urban attractions: 39%

Top 5 Strongest Impressions of the USA

- Diverse: 47%
- Trendy: 32%
- Open-minded: 28%
- Adventurous: 25%
- Energetic: 24%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

- I did/will not decide in advance: 1%
- 1 day or less: 1%
- 2 to 6 days: 2%
- 1 to 2 weeks: 6%
- 3 to 4 weeks: 9%
- 1 to 2 months: 20%
- 3 to 5 months: 37%
- 6 to 12 months: 21%
- More than one year: 4%

**AIR BOOKING**

- 1 day or less/did not reserve in advance: 0%
- 2 to 6 days: 3%
- 1 to 2 weeks: 8%
- 3 to 4 weeks: 11%
- 1 to 2 months: 28%
- 3 to 5 months: 35%
- 6 to 12 months: 14%
- More than one year: 0%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 62%
- Personal recommendations from family or friends: 44%
- Websites or applications via mobile phone: 32%
- Information in printed travel guidebooks: 27%
- Websites or applications via tablet: 27%
### Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Less than $2,499</th>
<th>$2,500-$4,999</th>
<th>$5,000-$7,499</th>
<th>$7,500-$9,999</th>
<th>$10,000+</th>
</tr>
</thead>
<tbody>
<tr>
<td>34%</td>
<td>33%</td>
<td>18%</td>
<td>9%</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

- 18% (1 person)
- 45% (2+ people)
- 16% (3 people)
- 16% (4 people)
- 4% (5+ people)

### Months Traveled (March 2017–March 2019)

<table>
<thead>
<tr>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>13%</td>
<td>17%</td>
<td>18%</td>
<td>18%</td>
<td>21%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
</tr>
</thead>
<tbody>
<tr>
<td>31%</td>
<td>39%</td>
<td>29%</td>
<td>16%</td>
<td>11%</td>
<td>16%</td>
</tr>
</tbody>
</table>

### Destination Interest—Top 10 States

- New York: 58%
- California: 46%
- Florida: 30%
- Hawaii: 23%
- Washington: 22%
- Alaska: 15%
- Texas: 15%
- Colorado: 13%
- Nevada: 11%
- Arizona: 8%

### Likelihood of Travel to USA

- Never likely to visit: 5%
- In the next six months: 19%
- Six to twelve months: 21%
- One to two years: 24%
- Two to five years: 19%
- Maybe some time in the distant future: 11%

### Net Promoter

- I would bring it up to recommend as a destination: 51%
- I would tell people positive things about it if it were brought up: 28%
- I would tell people neither positive nor negative things if it were brought up: 14%
- I would tell people negative things about it if it were brought up: 5%
- I would bring it up to discourage people from traveling there: 2%

Source: Brand USA Market Intelligence Study 2019
United Kingdom

Top 5 Motivations for Selecting Last Intercontinental Destination

- Local lifestyle: 47%
- Cultural/historical attractions: 46%
- Beaches/seaside attractions: 43%
- Dining/gastronomy: 31%
- Urban Attractions: 30%

Top 5 Strongest Impressions of the USA

- Friendly: 39%
- Energetic: 36%
- Adventurous: 36%
- Diverse: 36%
- Trendy: 22%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day or less</td>
<td>2%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>5%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>4%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>7%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>11%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>25%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>32%</td>
</tr>
<tr>
<td>More than one year</td>
<td>10%</td>
</tr>
</tbody>
</table>

**AIR BOOKING**

<table>
<thead>
<tr>
<th>Duration</th>
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<tbody>
<tr>
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<tr>
<td>6 to 12 months</td>
<td>32%</td>
</tr>
<tr>
<td>More than one year</td>
<td>3%</td>
</tr>
</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 51%
- Website or applications via tablet: 31%
- Personal recommendations from family or friends: 30%
- Websites or applications via mobile phone: 26%
- Information in printed travel guidebooks: 22%
### Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499: 32%
- $2,500-$4,999: 32%
- $5,000-$7,499: 19%
- $7,500-$9,999: 9%
- $10,000+: 8%

### Months Traveled (March 2017–March 2019)

Jan: 25%
Feb: 21%
Mar: 24%
Apr: 27%
May: 30%
Jun: 25%
Jul: 26%
Aug: 31%
Sep: 30%
Oct: 24%
Nov: 17%
Dec: 18%

### Destination Interest—Top 10 States

1. California: 40%
2. New York: 38%
3. Florida: 35%
4. Hawaii: 23%
5. Alaska: 13%
6. Texas: 12%
7. Washington: 12%
8. Nevada: 10%
9. Arizona: 9%
10. Massachusetts: 9%

### Expected Travel Party Size of Next Intercontinental Trip

- 23%
- 46%
- 13% + 7%
- 11%

### Likelihood of Travel to USA

- Never likely to visit: 16%
- Maybe some time in the distant future: 20%
- One to two years: 25%
- Six to twelve months: 19%
- In the next six months: 15%
- Six to twelve months: 19%

### Net Promoter

- I would bring it up to recommend as a destination: 34%
- I would tell people positive things about it if it were brought up: 36%
- I would tell people neither positive nor negative things if it were brought up: 23%
- I would tell people negative things about it if it were brought up: 5%
- I would bring it up to discourage people from traveling there: 3%

Source: Brand USA Market Intelligence Study 2019