Market Profiles

2021 BRAND USA RESEARCH STUDY
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 to conduct proprietary consumer research in 15 markets worldwide. Respondents are recruited from an online panel. For markets outside North America, the results reflect responses from adults who have taken or are planning on taking an intercontinental trip for leisure purposes.
Australia

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 56%
- Shopping: 53%
- Local lifestyle: 51%
- Urban attractions: 41%
- Dining/gastronomy: 32%

Top 5 Strongest Impressions of the USA

- Friendly: 30%
- Adventurous: 30%
- Diverse: 29%
- Energetic: 27%
- Arrogant: 24%

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 decide in advance</td>
</tr>
<tr>
<td>1 day or less</td>
<td>2%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>10%</td>
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<td>1 to 2 weeks</td>
<td>8%</td>
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<td>7%</td>
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<td>12%</td>
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<tr>
<td>More than one year</td>
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<tr>
<td>6 to 12 months</td>
<td>22%</td>
</tr>
<tr>
<td>More than one year</td>
<td>6%</td>
</tr>
</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 57%
- Personal recommendations from family or friends: 45%
- Websites or applications via mobile phone: 38%
- Personal advice from travel professionals/travel agents: 34%
- Websites or applications via tablet: 31%
### Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499: 17%
- $2,500-$4,999: 23%
- $5,000-$7,499: 21%
- $7,500-$9,999: 11%
- $10,000+: 28%

### Expected Travel Party Size of Next Intercontinental Trip

- 18%
- 38%
- 43% (+ 14%)

### Months Traveled (March 2018–March 2020)

- JAN: 17%
- FEB: 17%
- MAR: 13%
- APR: 13%
- MAY: 12%
- JUN: 15%
- JUL: 13%
- AUG: 13%
- SEP: 17%
- OCT: 17%
- NOV: 12%
- DEC: 18%

### Destination Interest—Top 10 States

- New York: 52%
- California: 46%
- Hawaii: 39%
- Alaska: 24%
- Florida: 22%
- Texas: 19%
- Washington: 16%
- Nevada: 11%
- Colorado: 10%
- New Jersey: 10%

### Likelihood of Travel to USA

- Never likely to visit: 27%
- Maybe some time in the distant future: 20%
- One to two years: 25%
- Two to five years: 14%
- In the next six months: 6%
- Six to twelve months: 8%

### Net Promoter

- I would bring it up to recommend as a destination: 26%
- 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: 30%
- I would tell people negative things about it if it were brought up: 9%
- I would bring it up to discourage people from travelling there: 4%

Source: Brand USA Market Intelligence Study 2021
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 58%
- Local lifestyle: 47%
- Beaches/seaside attractions: 46%
- Ecotourism and nature: 46%
- Urban attractions: 41%

Top 5 Strongest Impressions of the USA

- Adventurous: 39%
- Diverse: 38%
- Trendy: 24%
- Arrogant: 22%
- Energetic: 21%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

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</tr>
<tr>
<td>1 day or less</td>
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</tr>
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<td>3%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>5%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>10%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>17%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>28%</td>
</tr>
<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: 61%
- Personal recommendations from family or friends: 36%
- Websites or applications via mobile phone: 36%
- Websites or applications via tablet: 34%
- Information in print travel guidebooks: 33%
Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499: 20%
- $2,500-$4,999: 36%
- $5,000-$7,499: 24%
- $7,500-$9,999: 8%
- $10,000+: 12%

Expected Travel Party Size of Next Intercontinental Trip

- 10%
- 49%
- + 13%
- 31%

Months Traveled (March 2018–March 2020)

- JAN: 11%
- FEB: 13%
- MAR: 16%
- APR: 16%
- MAY: 18%
- JUN: 21%
- JUL: 35%
- AUG: 30%
- SEP: 26%
- OCT: 14%
- NOV: 11%
- DEC: 12%

Destination Interest—Top 10 States

- California: 47%
- New York: 43%
- Florida: 36%
- Hawaii: 26%
- Texas: 17%
- Washington: 15%
- Arizona: 15%
- Nevada: 13%
- Alaska: 13%
- Louisiana: 12%

Likelihood of Travel to USA

Net Promoter

- I would bring it up to recommend as a destination: 31%
- 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: 7%
- I would bring it up to discourage people from travelling there: 5%

Source: Brand USA Market Intelligence Study 2021
Brazil

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- 73% Websites via computer or laptop
- 61% Websites or applications via mobile phone
- 48% Personal recommendations from family or friends
- 35% Websites or applications via tablet
- 35% Personal advice from travel professionals/travel agents

Top 5 Motivations for Selecting Last Intercontinental Destination

- 65% Shopping
- 62% Cultural/historical attractions
- 62% Dining/gastronomy
- 60% Urban attractions
- 58% Local lifestyle

Top 5 Strongest Impressions of the USA

- 46% Diverse
- 42% Sophisticated
- 36% Creative
- 34% Down-to-earth
- 32% Energetic

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 decide in advance 2%</td>
</tr>
<tr>
<td>1 day or less</td>
<td>2 to 6 days 10%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>1 to 2 weeks 9%</td>
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<td>1 to 2 months 21%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>3 to 5 months 20%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>6 to 12 months 21%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>More than one year 3%</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

- 73% Websites via computer or laptop
- 61% Websites or applications via mobile phone
- 48% Personal recommendations from family or friends
- 35% Websites or applications via tablet
- 35% Personal advice from travel professionals/travel agents
Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499: 29%
- $2,500-$4,999: 35%
- $5,000-$7,499: 14%
- $7,500-$9,999: 10%
- $10,000+: 12%

Expected Travel Party Size of Next Intercontinental Trip

- 13%
- 41%
- + 10%
- 47%

Months Traveled (March 2018–March 2020)

- January: 32%
- February: 15%
- March: 14%
- April: 9%
- May: 9%
- June: 15%

- July: 22%
- August: 8%
- September: 10%
- October: 8%
- November: 12%
- December: 23%

Destination Interest—Top 10 States

- California: 50%
- New York: 50%
- Florida: 49%
- Hawaii: 30%
- Texas: 19%

- Alaska: 14%
- Washington: 13%
- Nevada: 9%
- New Jersey: 8%
- Arizona: 8%

Likelihood of Travel to USA

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: 11%
- I would tell people negative things about it if it were brought up: 2%
- I would bring it up to discourage people from travelling there: 2%

Source: Brand USA Market Intelligence Study 2021
Top 5 Motivations for Selecting Last Intercontinental Destination

- Beaches/seaside attractions: 53%
- Cultural/historical attractions: 44%
- Dining/gastronomy: 41%
- Shopping: 38%
- Local lifestyle: 38%

Top 5 Strongest Impressions of the USA

- Arrogant: 33%
- Diverse: 33%
- Adventurous: 25%
- Friendly: 23%
- Energetic: 22%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

- I did/will not decide in advance: 4%
- 1 day or less: 3%
- 2 to 6 days: 5%
- 1 to 2 weeks: 5%
- 3 to 4 weeks: 7%
- 1 to 2 months: 19%
- 3 to 5 months: 26%
- 6 to 12 months: 24%
- More than one year: 7%

**AIR BOOKING**

- 1 day or less/did not decide in advance: 1%
- 2 to 6 days: 4%
- 1 to 2 weeks: 7%
- 3 to 4 weeks: 11%
- 1 to 2 months: 25%
- 3 to 5 months: 33%
- 6 to 12 months: 17%
- More than one year: 2%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 64%
- Personal recommendations from family or friends: 43%
- Websites or applications via mobile phone: 32%
- Websites or applications via tablet: 27%
- Personal advice from travel professionals/travel agents: 20%
**Expected Household Travel Spending for Next Intercontinental Trip**

<table>
<thead>
<tr>
<th>Spending</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>41%</td>
</tr>
<tr>
<td>$2,500-$4,999</td>
<td>37%</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**

- 17% 1 person
- 44% 2 persons
- 11% 3 persons
- 14% 4 or more persons
- 29%

**Months Traveled (March 2018–March 2020)**

<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>16%</td>
<td>18%</td>
<td>18%</td>
<td>11%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>JUL</td>
<td>18%</td>
<td>17%</td>
<td>14%</td>
<td>12%</td>
<td>12%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**Destination Interest—Top 10 States**

- California: 43%
- Hawaii: 37%
- New York: 34%
- Florida: 34%
- Nevada: 16%
- Alaska: 15%
- Texas: 13%
- Arizona: 13%
- Washington: 11%
- Colorado: 10%

**Likelihood of Travel to USA**

- Never likely to visit: 11%
- Maybe some time in the distant future: 5%
- In the next six months: 15%
- One to two years: 28%
- Two to five years: 14%
- Six to twelve months: 28%

**Net Promoter**

- I would bring it up to recommend as a destination: 27%
- I would tell people positive things about it if it were brought up: 30%
- I would tell people neither positive nor negative things if it were brought up: 31%
- I would tell people negative things about it if it were brought up: 9%
- I would bring it up to discourage people from travelling there: 3%

Source: Brand USA Market Intelligence Study 2021
Top 5 Motivations for Selecting Last Intercontinental Destination

- Urban attractions: 62%
- Cultural/historical attractions: 56%
- Ecotourism and nature: 56%
- Beaches/seaside attractions: 53%
- Dining/gastronomy: 51%

Top 5 Strongest Impressions of the USA

- Diverse: 27%
- Open-minded: 25%
- Energetic: 22%
- Arrogant: 21%
- Creative: 21%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

<table>
<thead>
<tr>
<th>Window</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I did/will not decide</td>
<td>3%</td>
</tr>
<tr>
<td>1 day or less</td>
<td>9%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>19%</td>
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<tr>
<td>1 to 2 weeks</td>
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</tr>
<tr>
<td>6 to 12 months</td>
<td>2%</td>
</tr>
<tr>
<td>More than one year</td>
<td>0%</td>
</tr>
</tbody>
</table>

**AIR BOOKING**

<table>
<thead>
<tr>
<th>Window</th>
<th>Percentage</th>
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<tbody>
<tr>
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<td>6 to 12 months</td>
<td>2%</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 or applications via mobile phone: 52%
- Websites via computer or laptop: 47%
- Websites or applications via tablet: 40%
- Personal advice from travel professionals/travel agents: 40%
- Personal recommendations from family or friends: 39%
Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>24%</td>
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<tr>
<td>$7,500-$9,999</td>
<td>11%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>20%</td>
</tr>
</tbody>
</table>

Expected Travel Party Size of Next Intercontinental Trip

- 34% 1-person
- 37% 2-person
- 5% 3-person
- 13% 4-person
- 32% 8-person

Months Traveled (March 2018–March 2020)

- JAN: 4%
- FEB: 9%
- MAR: 11%
- APR: 12%
- MAY: 28%
- JUN: 21%
- JUL: 19%
- AUG: 20%
- SEP: 13%
- OCT: 32%
- NOV: 5%
- DEC: 4%

Destination Interest—Top 10 States

- California: 26%
- Hawaii: 22%
- New York: 17%
- Alaska: 17%
- Maryland: 11%
- Washington: 10%
- District of Columbia: 10%
- Florida: 9%
- Massachusetts: 7%
- Colorado: 7%

Likelihood of Travel to USA

- Never likely to visit: 17%
- Maybe some time in the distant future: 22%
- One to two years: 21%
- Two to five years: 22%
- In the next six months: 11%
- Six to twelve months: 7%

Net Promoter

- I would bring it up to recommend as a destination: 20%
- 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: 16%
- I would bring it up to discourage people from travelling there: 8%

Source: Brand USA Market Intelligence Study 2021
France

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 53%
- Local lifestyle: 50%
- Urban attractions: 45%
- Beaches/seaside attractions: 41%
- Dining/gastronomy: 41%

Top 5 Strongest Impressions of the USA

- Diverse: 36%
- Adventurous: 26%
- Open-minded: 22%
- Trendy: 21%
- Arrogant: 21%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

DESTINATION DECISION

- 1 day or less: 3%
- 2 to 6 days: 8%
- 1 to 2 weeks: 10%
- 3 to 4 weeks: 15%
- 1 to 2 months: 28%
- 3 to 5 months: 20%
- 6 to 12 months: 5%
- More than one year: 4%

AIR BOOKING

- 1 day or less: 1%
- 2 to 6 days: 4%
- 1 to 2 weeks: 10%
- 3 to 4 weeks: 10%
- 1 to 2 months: 18%
- 3 to 5 months: 35%
- 6 to 12 months: 20%
- More than one year: 1%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 53%
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- Websites or applications via mobile phone: 36%
- Information in print travel guidebooks: 34%
- Websites or applications via tablet: 30%
Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
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<th>Spending Range</th>
<th>Percentage</th>
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<td>$7,500-$9,999</td>
<td>9%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>7%</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>17%</td>
<td></td>
</tr>
<tr>
<td>43%</td>
<td>+14%</td>
</tr>
<tr>
<td>34%</td>
<td></td>
</tr>
</tbody>
</table>

Months Traveled (March 2018–March 2020)

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN</td>
<td>9%</td>
</tr>
<tr>
<td>FEB</td>
<td>13%</td>
</tr>
<tr>
<td>MAR</td>
<td>12%</td>
</tr>
<tr>
<td>APR</td>
<td>15%</td>
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<td>MAY</td>
<td>16%</td>
</tr>
<tr>
<td>JUN</td>
<td>18%</td>
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<tr>
<td>JUL</td>
<td>29%</td>
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<tr>
<td>AUG</td>
<td>30%</td>
</tr>
<tr>
<td>SEP</td>
<td>19%</td>
</tr>
<tr>
<td>OCT</td>
<td>14%</td>
</tr>
<tr>
<td>NOV</td>
<td>8%</td>
</tr>
<tr>
<td>DEC</td>
<td>11%</td>
</tr>
</tbody>
</table>

Destination Interest—Top 10 States

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>45%</td>
</tr>
<tr>
<td>New York</td>
<td>42%</td>
</tr>
<tr>
<td>Florida</td>
<td>32%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>22%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>18%</td>
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<tr>
<td>Texas</td>
<td>17%</td>
</tr>
<tr>
<td>Washington</td>
<td>15%</td>
</tr>
<tr>
<td>Colorado</td>
<td>13%</td>
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<tr>
<td>Alaska</td>
<td>12%</td>
</tr>
<tr>
<td>Arizona</td>
<td>11%</td>
</tr>
</tbody>
</table>

Likelihood of Travel to USA

Net Promoter

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would bring it up to recommend as a destination</td>
<td>35%</td>
</tr>
<tr>
<td>I would tell people positive things about it if it were brought up</td>
<td>26%</td>
</tr>
<tr>
<td>I would tell people neither positive nor negative things if it were brought up</td>
<td>30%</td>
</tr>
<tr>
<td>I would tell people negative things about it if it were brought up</td>
<td>6%</td>
</tr>
<tr>
<td>I would bring it up to discourage people from travelling there</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: Brand USA Market Intelligence Study 2021
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 44%
- Shopping: 41%
- Dining/gastronomy: 40%
- Urban attractions: 37%
- Ecotourism and nature: 35%

Top 5 Strongest Impressions of the USA

- Diverse: 46%
- Adventurous: 34%
- Forward-thinking: 24%
- Energetic: 24%
- Trendy: 24%

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>1 day or less/did not decide in advance</td>
<td>0%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>5%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>3%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>6%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>9%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>16%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>20%</td>
</tr>
<tr>
<td>More than one year</td>
<td>5%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>29%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>37%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>3%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>17%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>0%</td>
</tr>
<tr>
<td>More than one year</td>
<td>5%</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: 36%
- Information in print travel guidebooks: 29%
- Websites or applications via mobile phone: 28%
- Websites or applications via tablet: 30%
**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>22%</td>
</tr>
<tr>
<td>$2,500-$4,999</td>
<td>32%</td>
</tr>
<tr>
<td>$5,000-$7,499</td>
<td>25%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>11%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

- 22% of people plan to travel in a group of 3 or more
- 49% plan to travel with family
- 13% plan to travel with friends
- 23% plan to travel solo

**Months Traveled (March 2018–March 2020)**

- **JAN**: 11%
- **FEB**: 15%
- **MAR**: 18%
- **APR**: 16%
- **MAY**: 20%
- **JUN**: 22%
- **JUL**: 24%
- **AUG**: 30%
- **SEP**: 24%
- **OCT**: 19%
- **NOV**: 11%
- **DEC**: 11%

**Destination Interest—Top 10 States**

- California: 44%
- New York: 35%
- Florida: 35%
- Hawaii: 30%
- Texas: 19%
- Alaska: 16%
- Arizona: 15%
- Nevada: 12%
- Washington: 11%
- Mississippi: 11%

**Likelihood of Travel to USA**

- 44% are very likely to visit in the next six months
- 15% are very likely to visit six to twelve months from now
- 14% are very likely to visit one to two years from now
- 22% are very likely to visit two to five years from now
- 19% are very likely to visit in the distant future
- 13% are maybe likely to visit one to two years from now
- 6% are maybe likely to visit six to twelve months from now
- 14% are maybe likely to visit in the next six months
- 26% are never likely to visit

**Net Promoter**

- I would bring it up to recommend as a destination: 31%
- 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: 28%
- I would tell people negative things about it if it were brought up: 8%
- I would bring it up to discourage people from travelling there: 6%

*Source: Brand USA Market Intelligence Study 2021*
**Top 5 Strongest Impressions of the USA**

- Friendly: 42%
- Open-minded: 40%
- Fresh: 36%
- Creative: 36%
- Trendy: 36%

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

- Beaches/seaside attractions: 65%
- Shopping: 63%
- Urban attractions: 60%
- Local lifestyle: 56%
- Ecotourism and nature: 54%

**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 decide in advance</td>
</tr>
<tr>
<td>1 day or less</td>
<td>2 to 6 days</td>
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<tr>
<td>2 to 6 days</td>
<td>1 to 2 weeks</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>3 to 4 weeks</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>1 to 2 months</td>
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<tr>
<td>1 to 2 months</td>
<td>3 to 5 months</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>6 to 12 months</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>More than one year</td>
</tr>
<tr>
<td>More than one year</td>
<td>1 day or less/did not decide in advance</td>
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<tr>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>7%</td>
<td>15%</td>
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<tr>
<td>26%</td>
<td>17%</td>
</tr>
<tr>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

- Websites via computer or laptop: 62%
- Websites or applications via mobile phone: 60%
- Personal recommendations from family or friends: 52%
- Online advertising/email: 48%
- Websites or applications via tablet: 42%
Expected Travel Party Size of Next Intercontinental Trip

- 29%
- 24%
- 43%
- 18%
- 11%

Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499: 39%
- $2,500-$4,999: 24%
- $5,000-$7,499: 17%
- $7,500-$9,999: 10%
- $10,000+: 10%

Destination Interest—Top 10 States

- New York: 45%
- California: 41%
- Alaska: 30%
- Hawaii: 24%
- New Jersey: 23%
- Florida: 19%
- Washington: 19%
- New Mexico: 17%
- Texas: 16%
- Arizona: 14%

Likelihood of Travel to USA

- Never likely to visit: 1%
- Maybe some time in the distant future: 8%
- One to two years: 27%
- Six to twelve months: 27%
- Two to five years: 14%
- In the next six months: 22%

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: 39%
- 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: 4%
- I would bring it up to discourage people from travelling there: 3%

Source: Brand USA Market Intelligence Study 2021
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 59%
- Urban Attractions: 58%
- Local lifestyle: 53%
- Beaches/seaside attractions: 44%
- Ecotourism and nature: 37%

Top 5 Strongest Impressions of the USA

- Forward-thinking: 33%
- Energetic: 31%
- Trendy: 30%
- Unexpected: 28%
- Adventurous: 27%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

- I did/will not decide in advance: 2%
- 1 day or less: 5%
- 2 to 6 days: 5%
- 1 to 2 weeks: 17%
- 3 to 4 weeks: 32%
- 1 to 2 months: 21%
- 3 to 5 months: 5%
- 6 to 12 months: 1%
- More than one year: 1%

**AIR BOOKING**

- 1 day or less/did not decide in advance: 1%
- 2 to 6 days: 2%
- 1 to 2 weeks: 3%
- 3 to 4 weeks: 10%
- 1 to 2 months: 26%
- 3 to 5 months: 38%
- 6 to 12 months: 17%
- More than one year: 1%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 58%
- Websites or applications via mobile phone: 44%
- Personal recommendations from family or friends: 36%
- Websites or applications via tablet: 35%
- Information in print travel guidebooks: 29%
**Expected Travel Party Size of Next Intercontinental Trip**

- 16%: 1 person
- 46%: 2-4 people
- 28%: 5+ people

**Expected Household Travel Spending for Next Intercontinental Trip**

- Less than $2,499: 29%
- $2,500-$4,999: 29%
- $5,000-$7,499: 20%
- $7,500-$9,999: 10%
- $10,000+: 12%

**Likelihood of Travel to USA**

- Never likely to visit: 29%
- Six to twelve months: 13%
- One to two years: 25%
- Two to five years: 33%
- Maybe some time in the distant future: 18%
- In the next six months: 7%
- Never likely to visit: 4%

**Destination Interest—Top 10 States**

- California: 46%
- New York: 40%
- Florida: 28%
- Hawaii: 24%
- Texas: 17%
- Alaska: 15%
- Colorado: 14%
- Washington: 14%
- Arizona: 12%
- Nevada: 11%

**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: 32%
- 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 travelling there: 2%

Source: Brand USA Market Intelligence Study 2021
Japan

**Top 5 Strongest Impressions of the USA**

- Diverse: 44%
- Energetic: 43%
- Friendly: 29%
- Optimistic: 21%
- Creative: 21%

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

- Websites via computer or laptop: 76%
- Websites or applications via mobile phone: 60%
- Information in print travel guidebooks: 52%
- Websites or applications via tablet: 43%
- Printed publications, articles or brochures: 37%

**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>3%</td>
</tr>
<tr>
<td>1 to 2 weeks</td>
<td>7%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>7%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>7%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>24%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>31%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>14%</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</td>
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<tr>
<td>6 to 12 months</td>
<td>14%</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: 70%
- Websites or applications via tablet: 41%
- Information in print travel guidebooks: 40%
- Websites or applications via mobile phone: 39%
- Printed publications, articles or brochures: 36%
Expected Household Travel Spending for Next Intercontinental Trip

<table>
<thead>
<tr>
<th>Spending Range</th>
<th>Probability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $2,499</td>
<td>21%</td>
</tr>
<tr>
<td>$2,500-$4,999</td>
<td>34%</td>
</tr>
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<td>7%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>15%</td>
</tr>
</tbody>
</table>

Expected Travel Party Size of Next Intercontinental Trip

- 22%
- 24%
- 24%
- 23%
- 21%
- 24%

Months Traveled (March 2018–March 2020)

- JAN: 18%
- FEB: 14%
- MAR: 17%
- APR: 11%
- MAY: 22%
- JUN: 11%
- JUL: 16%
- AUG: 26%
- SEP: 15%
- OCT: 14%
- NOV: 9%
- DEC: 16%

Destination Interest—Top 10 States

1. Hawaii: 44%
2. New York: 39%
3. California: 36%
4. Florida: 21%
5. Washington: 14%
6. Alaska: 12%
7. Texas: 10%
8. Massachusetts: 8%
9. Arizona: 8%
10. District of Columbia: 7%

Likelihood of Travel to USA

- Never likely to visit: 16%
- In the next six months: 11%
- Six to twelve months: 18%
- One to two years: 26%
- Two to five years: 24%
- Maybe some time in the distant future: 5%

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: 32%
- 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 travelling there: 2%

Source: Brand USA Market Intelligence Study 2021
Korea

Top 5 Motivations for Selecting Last Intercontinental Destination

- Beaches/seaside attractions: 64%
- Cultural/historical attractions: 60%
- Urban Attractions: 57%
- Ecotourism and nature: 53%
- Dining/gastronomy: 52%

Top 5 Strongest Impressions of the USA

- Open-minded: 49%
- Diverse: 48%
- Energetic: 44%
- Adventurous: 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>
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<tr>
<td>1 to 2 months</td>
<td>1 to 2 months</td>
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<td>3 to 5 months</td>
</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: 74%
- Websites or applications via mobile phone: 61%
- Personal recommendations from family or friends: 49%
- Websites or applications via tablet: 31%
- Personal advice from travel professionals/travel agents: 28%
### 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>39%</td>
</tr>
<tr>
<td>$5,000-$7,499</td>
<td>22%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>12%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>12%</td>
</tr>
</tbody>
</table>

### Expected Travel Party Size of Next Intercontinental Trip

- **14%**
- **36%**
- **27%**
- **21%**
- **22%**

### Months Traveled (March 2018–March 2020)

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN</td>
<td>13%</td>
</tr>
<tr>
<td>FEB</td>
<td>14%</td>
</tr>
<tr>
<td>MAR</td>
<td>16%</td>
</tr>
<tr>
<td>APR</td>
<td>12%</td>
</tr>
<tr>
<td>MAY</td>
<td>19%</td>
</tr>
<tr>
<td>JUN</td>
<td>13%</td>
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<tr>
<td>JUL</td>
<td>18%</td>
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<tr>
<td>AUG</td>
<td>18%</td>
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<tr>
<td>SEP</td>
<td>14%</td>
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<tr>
<td>OCT</td>
<td>15%</td>
</tr>
<tr>
<td>NOV</td>
<td>10%</td>
</tr>
<tr>
<td>DEC</td>
<td>11%</td>
</tr>
</tbody>
</table>

### Destination Interest—Top 10 States

- **California**: 54%
- **New York**: 52%
- **Hawaii**: 44%
- **Florida**: 25%
- **Washington**: 22%
- **Texas**: 16%
- **Alaska**: 15%
- **Arizona**: 12%
- **Pennsylvania**: 9%
- **Colorado**: 9%

### Likelihood of Travel to USA

- **Never likely to visit**: 18%
- **Maybe some time in the distant future**: 32%
- **One to two years**: 25%
- **Six to twelve months**: 15%
- **In the next six months**: 6%
- **Six to twelve months**: 4%

### Net Promoter

- **I would bring it up to recommend as a destination**: 39%
- **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**: 6%
- **I would bring it up to discourage people from travelling there**: 2%
**Top 5 Motivations for Selecting Last Intercontinental Destination**

- Cultural/historical attractions: 58%
- Dining/gastronomy: 56%
- Urban Attractions: 51%
- Shopping: 50%
- Theme Parks: 46%

**Top 5 Strongest Impressions of the USA**

- Diverse: 45%
- Trendy: 38%
- Adventurous: 35%
- Open-minded: 31%
- Down-to-earth: 30%

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

**DESTINATION DECISION**

- I did/will not decide in advance: 2%
- 1 day or less: 1%
- 2 to 6 days: 6%
- 1 to 2 weeks: 10%
- 3 to 4 weeks: 11%
- 1 to 2 months: 22%
- 3 to 5 months: 25%
- 6 to 12 months: 19%
- More than one year: 5%

**AIR BOOKING**

- 1 day or less/did not decide in advance: 1%
- 2 to 6 days: 6%
- 1 to 2 weeks: 14%
- 3 to 4 weeks: 17%
- 1 to 2 months: 23%
- 3 to 5 months: 24%
- 6 to 12 months: 13%
- More than one year: 1%

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

- Websites via computer or laptop: 68%
- Websites or applications via mobile phone: 50%
- Personal recommendations from family or friends: 45%
- Websites or applications via tablet: 41%
- Online advertising/email: 28%
**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>51%</td>
</tr>
<tr>
<td>$2,500-$4,999</td>
<td>30%</td>
</tr>
<tr>
<td>$5,000-$7,499</td>
<td>13%</td>
</tr>
<tr>
<td>$7,500-$9,999</td>
<td>3%</td>
</tr>
<tr>
<td>$10,000+</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

- 54% party size
- 36% party size
- 11% party size
- 9% party size
- +8% party size

**Months Traveled (March 2018–March 2020)**

<table>
<thead>
<tr>
<th>Month</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
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<tbody>
<tr>
<td></td>
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<td>10%</td>
<td>15%</td>
<td>19%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>JUL</td>
<td>24%</td>
<td>19%</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
<td>30%</td>
</tr>
</tbody>
</table>

**Destination Interest—Top 10 States**

- California: 51%
- New York: 46%
- Florida: 31%
- Hawaii: 27%
- Texas: 23%
- Nevada: 13%
- Washington: 13%
- Alaska: 12%
- Arizona: 9%
- Colorado: 8%

**Likelihood of Travel to USA**

- Never likely to visit: 4%
- One to two years: 17%
- Six to twelve months: 29%
- Two to five years: 5%
- Maybe some time in the distant future: 4%
- In the next six months: 40%

**Net Promoter**

- I would bring it up to recommend as a destination: 50%
- 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: 16%
- I would tell people negative things about it if it were brought up: 4%
- I would bring it up to discourage people from travelling there: 2%

Source: Brand USA Market Intelligence Study 2021
The Netherlands

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 59%
- Urban Attractions: 47%
- Beaches/seaside attractions: 41%
- Ecotourism and nature: 40%
- Shopping: 38%

Top 5 Strongest Impressions of the USA

- Adventurous: 45%
- Diverse: 39%
- Energetic: 25%
- Trendy: 24%
- Friendly: 23%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

- I did/will not decide in advance: 4%
- 1 day or less: 4%
- 2 to 6 days: 8%
- 1 to 2 weeks: 10%
- 3 to 4 weeks: 9%
- 1 to 2 months: 14%
- 3 to 5 months: 26%
- 6 to 12 months: 20%
- More than one year: 5%

**AIR BOOKING**

- 1 day or less/did not decide in advance: 1%
- 2 to 6 days: 3%
- 1 to 2 weeks: 5%
- 3 to 4 weeks: 11%
- 1 to 2 months: 18%
- 3 to 5 months: 34%
- 6 to 12 months: 26%
- More than one year: 2%

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 62%
- Websites or applications via mobile phone: 39%
- Websites or applications via tablet: 31%
- Personal recommendations from family or friends: 27%
- Personal advice from travel professionals/travel agents: 24%
Expected Travel Party Size of Next Intercontinental Trip

- 10% 11%
- 48% - 12%
- 35%

Destination Interest—Top 10 States

- New York 43%
- California 43%
- Florida 34%
- Hawaii 26%
- Texas 17%
- Washington 14%
- Alaska 13%
- Arizona 12%
- Nevada 11%
- Colorado 9%

Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499 21%
- $2,500-$4,999 27%
- $5,000-$7,499 22%
- $7,500-$9,999 12%
- $10,000+ 18%

Expected Household Travel Spending for Next Intercontinental Trip

- $10,000+
- $7,500-$9,999 12%
- $5,000-$7,499 22%
- $2,500-$4,999 27%
- Less than $2,499 21%

Likelihood of Travel to USA

- Never likely to visit
- In the next six months
- Six to twelve months
- One to two years
- Two to five years

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 30%
- 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 7%
- I would bring it up to discourage people from travelling there 5%

Source: Brand USA Market Intelligence Study 2021

Months Traveled (March 2018–March 2020)

JAN 10%
FEB 15%
MAR 17%
APR 14%
MAY 22%
JUN 23%
JUL 30%
AUG 35%
SEP 22%
OCT 17%
NOV 10%
DEC 13%

Net Promoter

- I would bring it up to recommend as a destination
- I would tell people positive things about it if it were brought up
- I would tell people neither positive nor negative things if it were brought up
- I would tell people negative things about it if it were brought up
- I would bring it up to discourage people from travelling there
Spain

Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 61%
- Urban Attractions: 51%
- Beaches/seaside attractions: 49%
- Ecotourism and nature: 47%
- Shopping: 46%

Top 5 Strongest Impressions of the USA

- Diverse: 41%
- Trendy: 29%
- Open-minded: 26%
- Energetic: 25%
- Adventurous: 25%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

**DESTINATION DECISION**

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than one year</td>
<td>4%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>16%</td>
</tr>
<tr>
<td>1 to 2 months</td>
<td>21%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>32%</td>
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<tr>
<td>3 to 4 weeks</td>
<td>10%</td>
</tr>
<tr>
<td>2 to 6 days</td>
<td>9%</td>
</tr>
<tr>
<td>1 day or less</td>
<td>5%</td>
</tr>
<tr>
<td>I did/will not decide in advance</td>
<td>2%</td>
</tr>
</tbody>
</table>

**AIR BOOKING**

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than one year</td>
<td>0%</td>
</tr>
<tr>
<td>6 to 12 months</td>
<td>17%</td>
</tr>
<tr>
<td>3 to 5 months</td>
<td>25%</td>
</tr>
<tr>
<td>3 to 4 weeks</td>
<td>12%</td>
</tr>
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<td>3%</td>
</tr>
<tr>
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</tbody>
</table>

Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 60%
- Personal recommendations from family or friends: 42%
- Websites or applications via mobile phone: 38%
- Websites or applications via tablet: 31%
- Personal advice from travel professionals/travel agents: 26%
**Expected Household Travel Spending for Next Intercontinental Trip**

- Less than $2,499: 33%
- $2,500-$4,999: 31%
- $5,000-$7,499: 17%
- $7,500-$9,999: 7%
- $10,000+: 12%

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

- 8%
- 48%
- + 12%
- 39%

**Months Traveled (March 2018–March 2020)**

- JAN: 11%
- FEB: 12%
- MAR: 12%
- APR: 15%
- MAY: 15%
- JUN: 18%
- JUL: 27%
- AUG: 31%
- SEP: 23%
- OCT: 12%
- NOV: 10%
- DEC: 14%

**Destination Interest—Top 10 States**

- New York: 49%
- California: 46%
- Florida: 31%
- Hawaii: 25%
- Washington: 20%
- Alaska: 15%
- Texas: 15%
- Colorado: 10%
- Nevada: 10%
- Massachusetts: 8%

**Likelihood of Travel to USA**

- Never likely to visit: 6%
- In the next six months: 13%
- Six to twelve months: 17%
- One to two years: 28%
- Two to five years: 24%
- Maybe some time in the distant future: 13%

**Net Promoter**

- I would bring it up to recommend as a destination: 48%
- 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: 18%
- I would tell people negative things about it if it were brought up: 6%
- I would bring it up to discourage people from travelling there: 2%

Source: Brand USA Market Intelligence Study 2021
Top 5 Motivations for Selecting Last Intercontinental Destination

- Cultural/historical attractions: 46%
- Local Lifestyle: 42%
- Beaches/seaside attractions: 40%
- Urban Attractions: 37%
- Theme Parks: 34%

Top 5 Strongest Impressions of the USA

- Friendly: 35%
- Adventurous: 34%
- Diverse: 33%
- Energetic: 32%
- Arrogant: 20%

Destination Decision and Air Booking Windows for Next Intercontinental Trip

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Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

- Websites via computer or laptop: 56%
- Personal recommendations from family or friends: 32%
- Websites or applications via mobile phone: 29%
- Websites or applications via tablet: 29%
- Information in print travel guidebooks: 18%
Expected Travel Party Size of Next Intercontinental Trip

- 26%
- 37%
- 9%
- 8%
- 32%

Expected Household Travel Spending for Next Intercontinental Trip

- Less than $2,499: 31%
- $2,500-$4,999: 28%
- $5,000-$7,499: 21%
- $7,500-$9,999: 10%
- $10,000+: 9%

Months Traveled (March 2018–March 2020)

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Destination Interest—Top 10 States

1. California: 44%
2. New York: 42%
3. Florida: 34%
4. Hawaii: 25%
5. Alaska: 18%
6. Texas: 16%
7. Nevada: 15%
8. Arizona: 13%
9. Washington: 12%
10. Colorado: 11%

Likelihood of Travel to USA

- Never likely to visit: 7%
- Maybe some time in the distant future: 17%
- One to two years: 23%
- Six to twelve months: 17%
- Two to five years: 26%
- In the next six months: 9%

Net Promoter

- I would bring it up to recommend as a destination: 29%
- 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: 27%
- I would tell people negative things about it if it were brought up: 5%
- I would bring it up to discourage people from travelling there: 2%

Source: Brand USA Market Intelligence Study 2021