



GLOBAL TRENDS

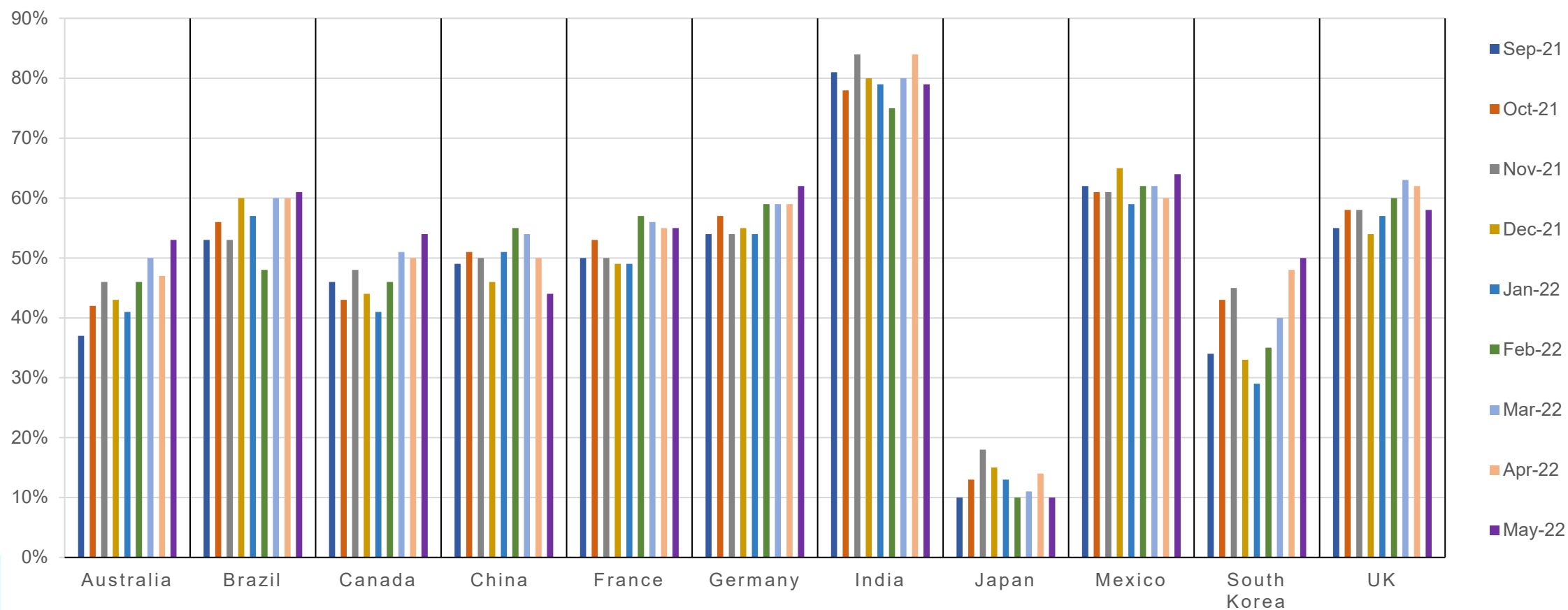


BRAND USA CONSUMER SENTIMENT

Likelihood to travel internationally increased in most markets

Asian markets registered lower likelihood to travel than previous month

Likelihood To Travel Internationally In The Next 12 Months



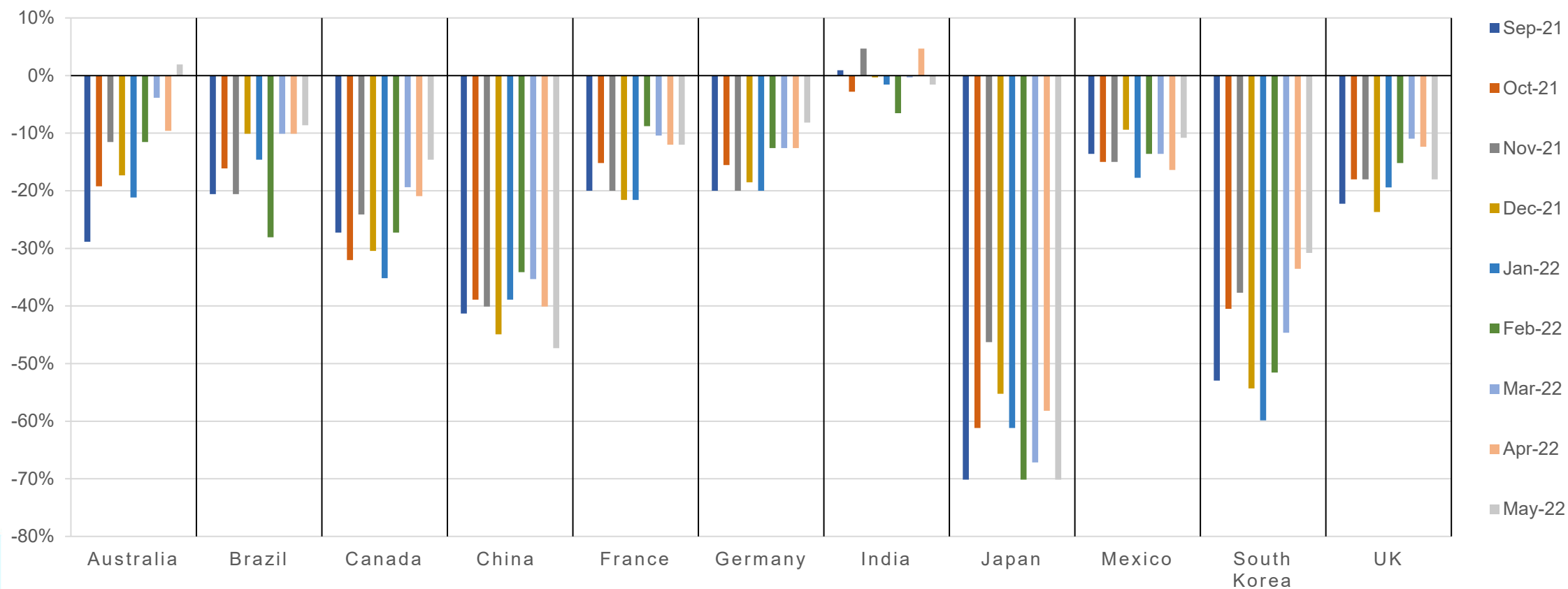
Base: All respondents

Source: Brand USA Consumer Sentiment Study

Likelihood to travel internationally among Australian surpassed 2019 level

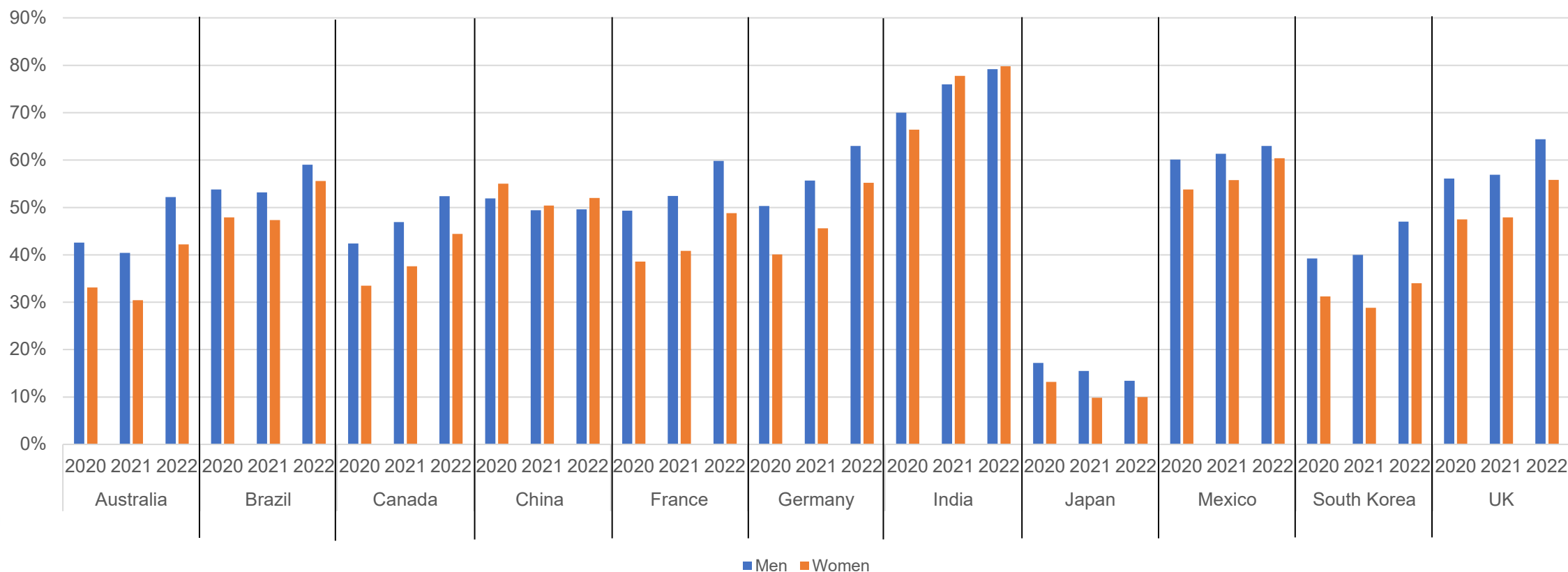
Excluding the Asian markets, likelihood to travel internationally is down less than 10% on average

Likelihood To Travel Internationally In The Next 12 Months
(%Change from 2019 average level)



Women's likelihood to travel internationally in 2022* has increased more than men's likelihood to travel

Likelihood To Travel Internationally In The Next 12 Months: By Gender
(Year average)

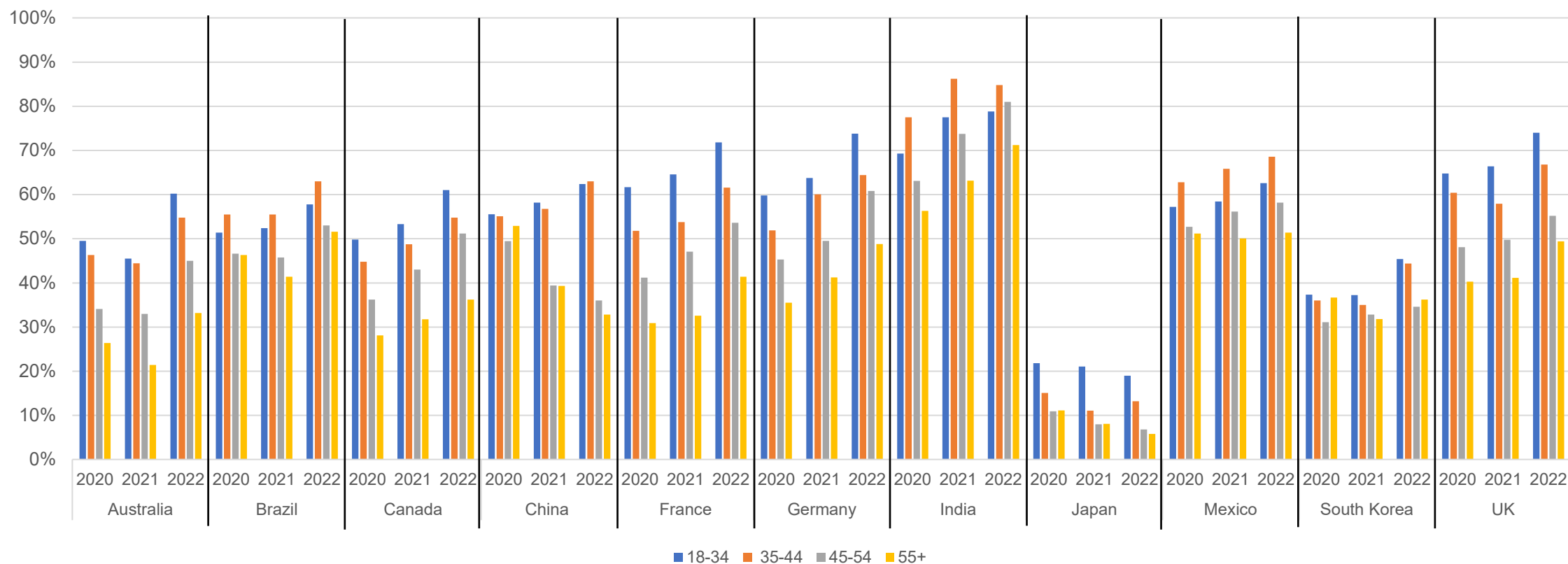


*% YoY change. Comparing 2022 (Jan-May) to 2021
Base: All respondents

Source: Brand USA Consumer Sentiment Study

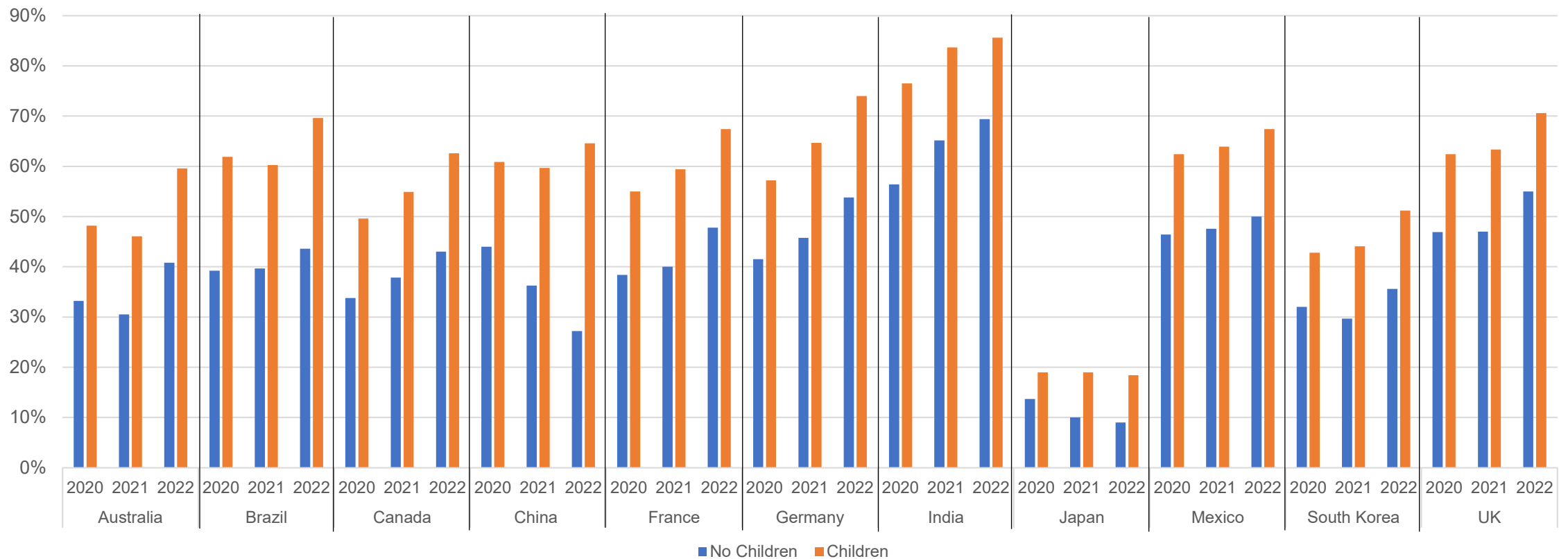
Likelihood to travel internationally is higher among the younger generations

Likelihood To Travel Internationally In The Next 12 Months: By Age Group
(Year average)



Families with young children in the household have a higher likelihood to travel internationally than those without them

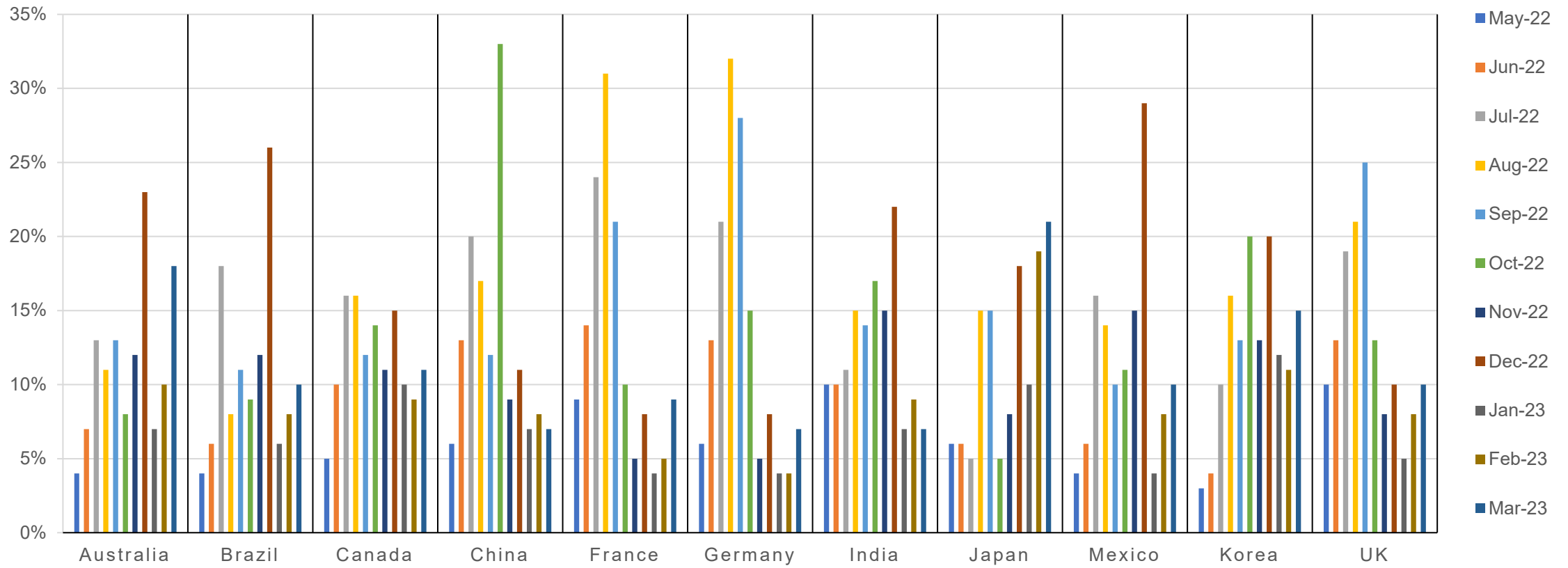
Likelihood To Travel Internationally In The Next 12 Months: By Children in the Household
(Year average)



Europeans and Canadians planning on traveling between July and September

Australian, Brazilians, Indians and Mexicans are planning more for the holidays

International Trips: Planning Departure Months (Next 12 Months)
(May 2022)

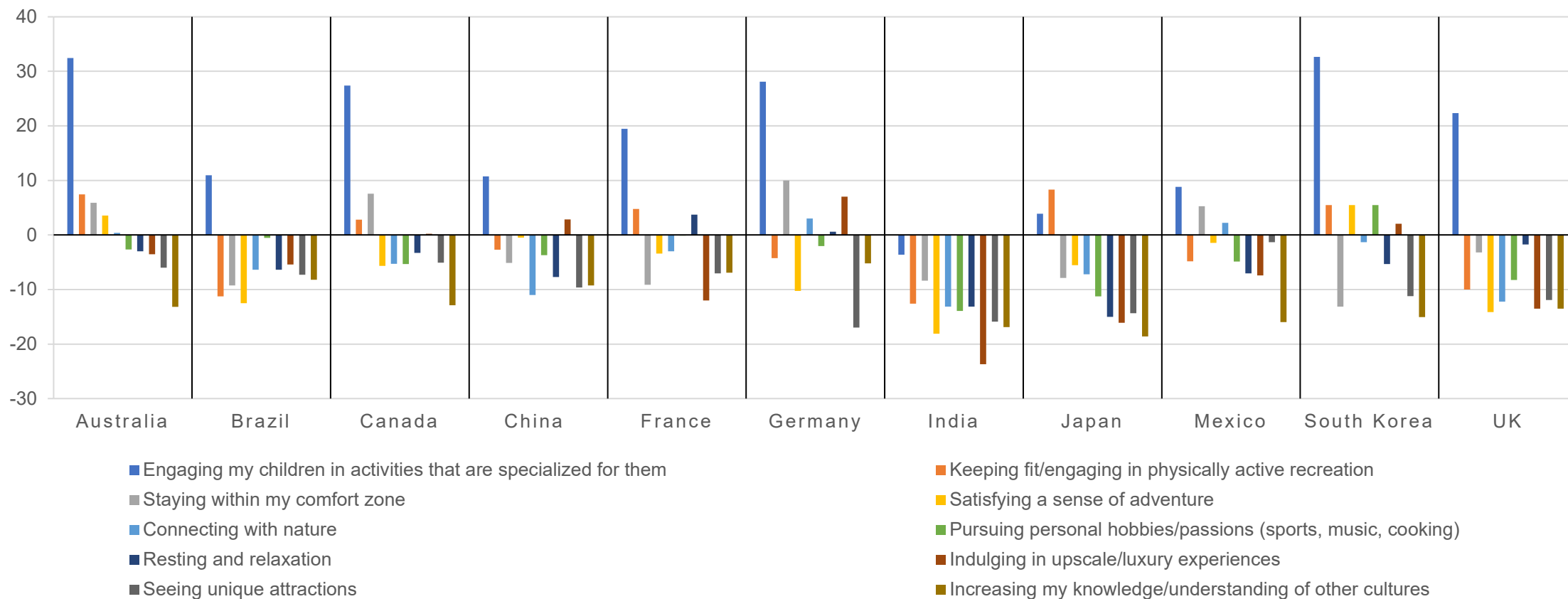


Base: Respondents who are likely to take an international trip in the next 12 months

Source: Brand USA Consumer Sentiment Study

Engaging kids in activities when selecting an international destination is still very strong among families with young children

International Destination Selection: Personal Considerations
(PPS Difference over 2019 Market Intelligence Study* – May 2022)

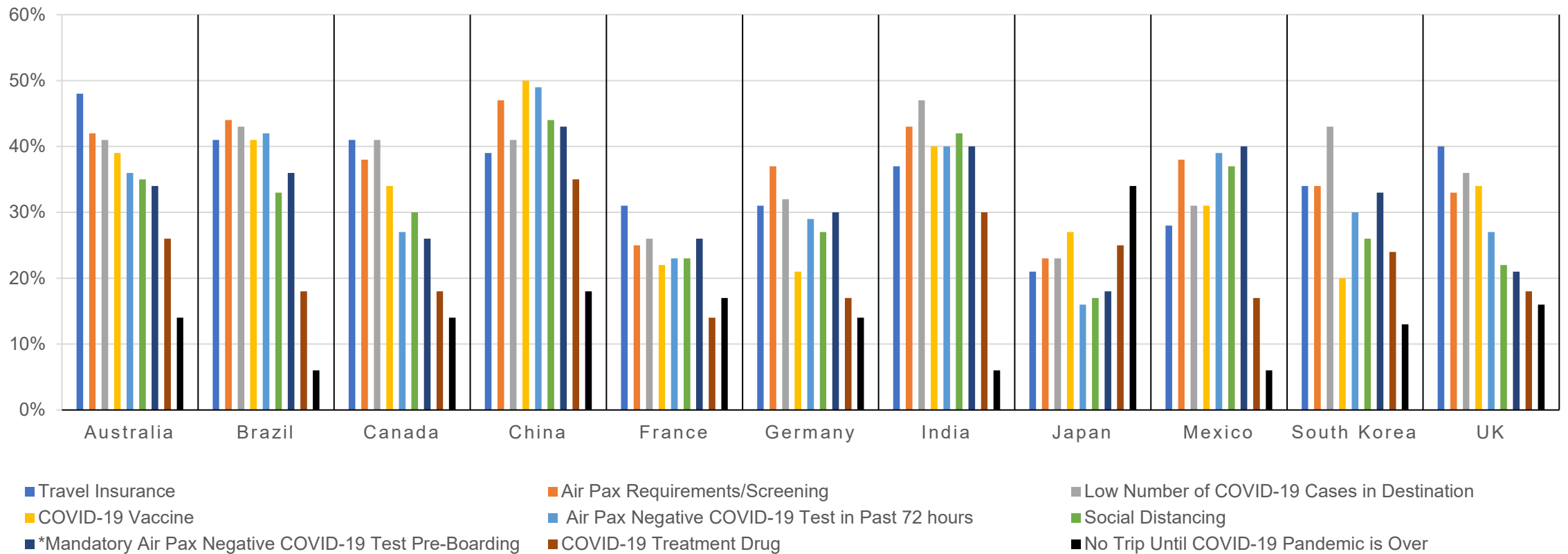


*Market Intelligence Study excludes VFR
Base: Respondents who are likely to take an international trip in the next 12 months

Source: Brand USA Consumer Sentiment Study

Travel insurance that covers covid related issues is absolutely necessary for Australians, French and UK to travel overseas

Necessities for Overseas/International* Travel (May 2022)

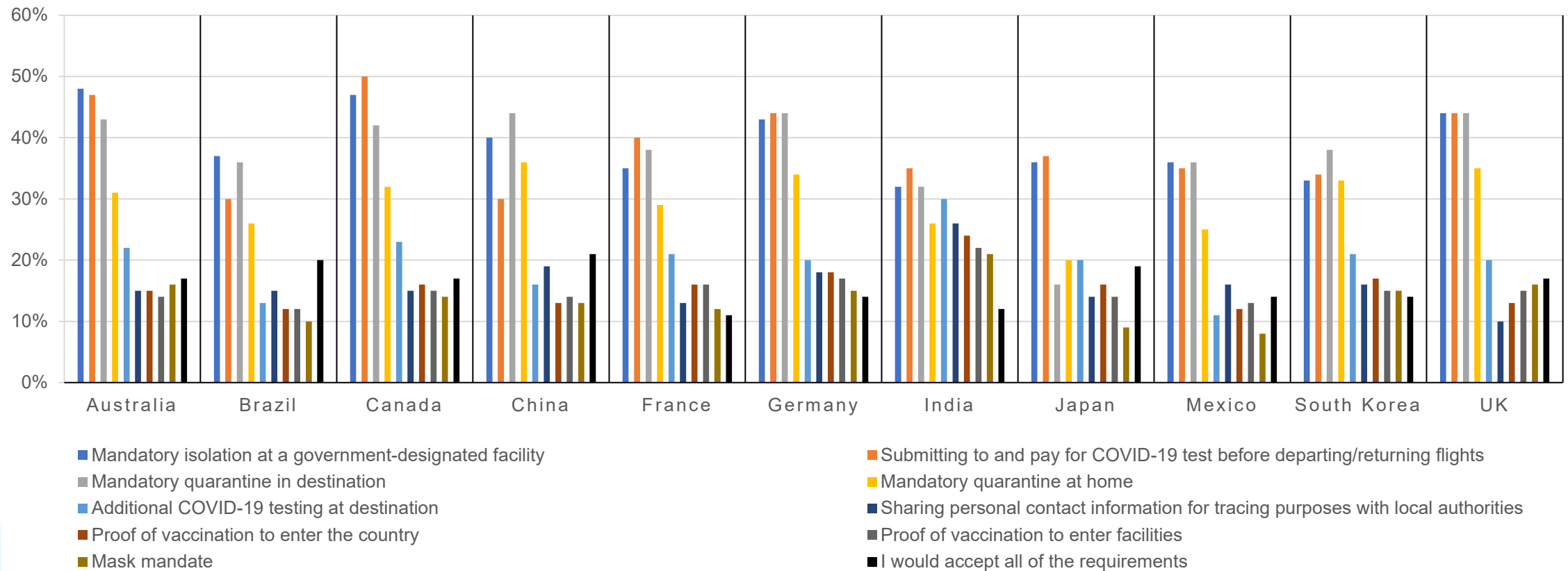


*Overseas travel for all markets except Canada and Mexico
Base: All respondents

Source: Brand USA Consumer Sentiment Study

Quarantine and Covid-testing are the top two requirements travelers are not willing to accept to travel overseas

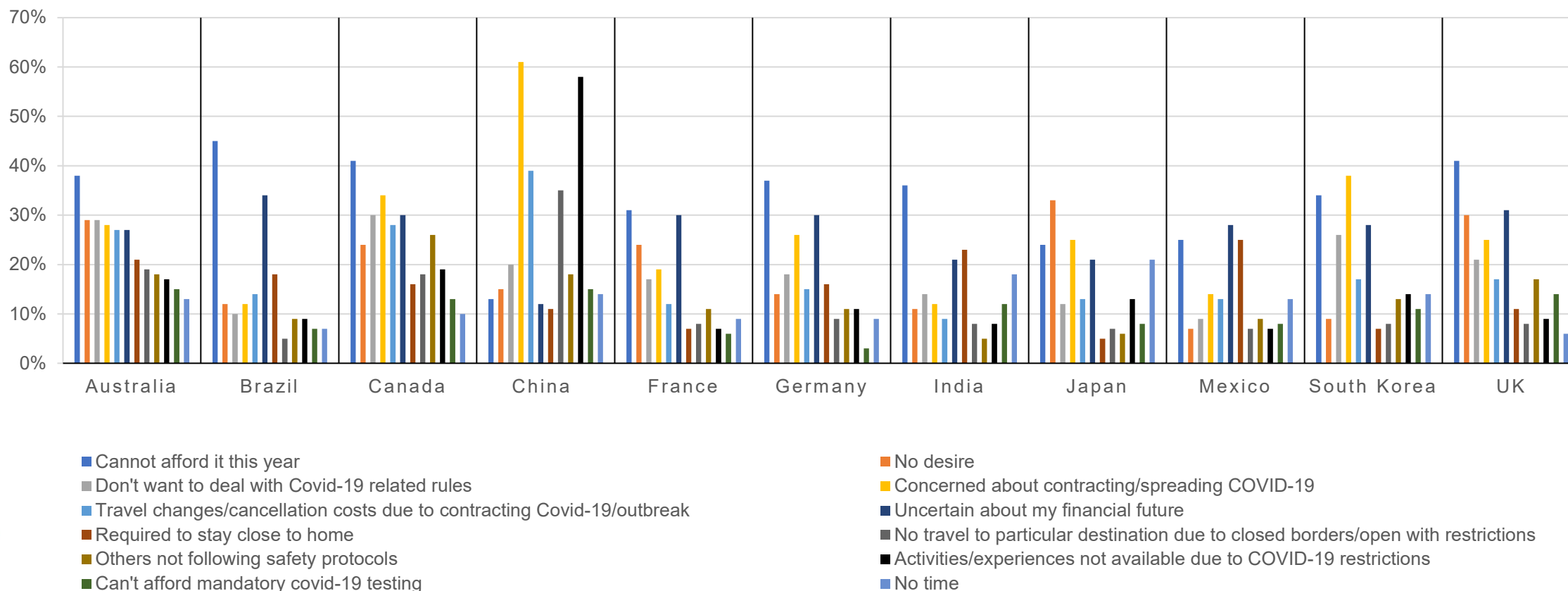
UNACCEPTABLE Requirements for Overseas*/International Travel (May 2022)



Financial reasons have become the number one reasons for not traveling

As covid related reasons have declined

Reasons for Traveling Internationally (May 2022)



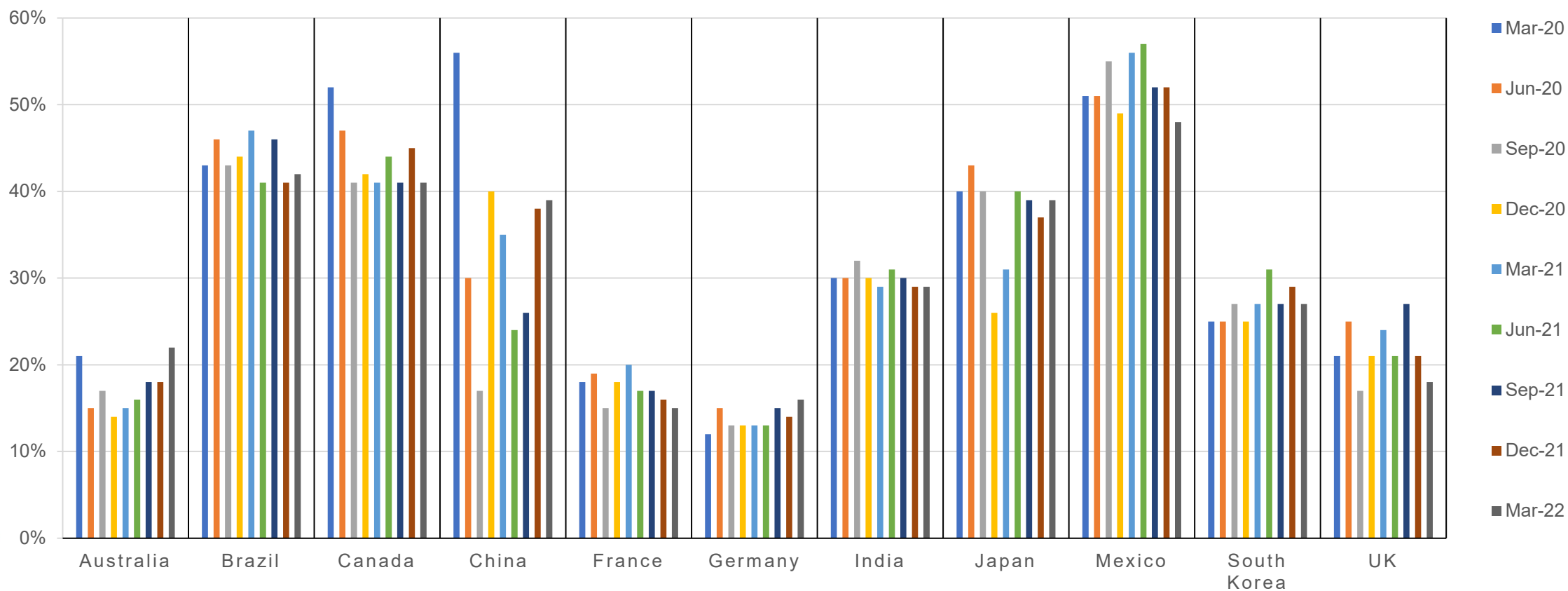
*Overseas travel for all markets except Canada and Mexico

Base: Anything would be absolutely necessary in order to take an overseas/international leisure trip

Source: Brand USA Consumer Sentiment Study

Likelihood to travel from Australia increased after travel restrictions were removed in February

Likelihood to Travel to the USA in the Next 12 Months

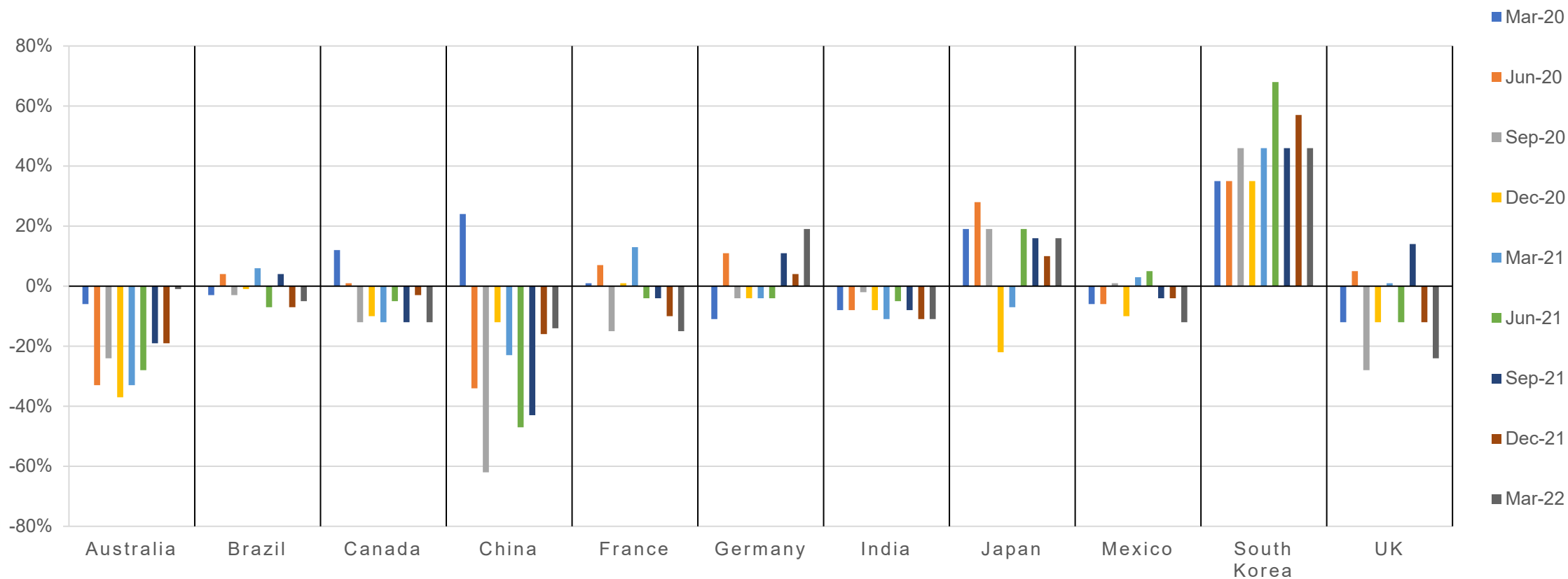


Base: Respondents who are likely to take an international trip in the next 12 months

Source: Brand USA Consumer Sentiment Study

Likelihood to travel to the USA from South Korea has remained above 2019 levels

Likelihood to Travel the USA in the Next 12 months
(% Change from 2019 average level)



Base: Respondents who are likely to take an international trip in the next 12 months

Source: Brand USA Consumer Sentiment Study

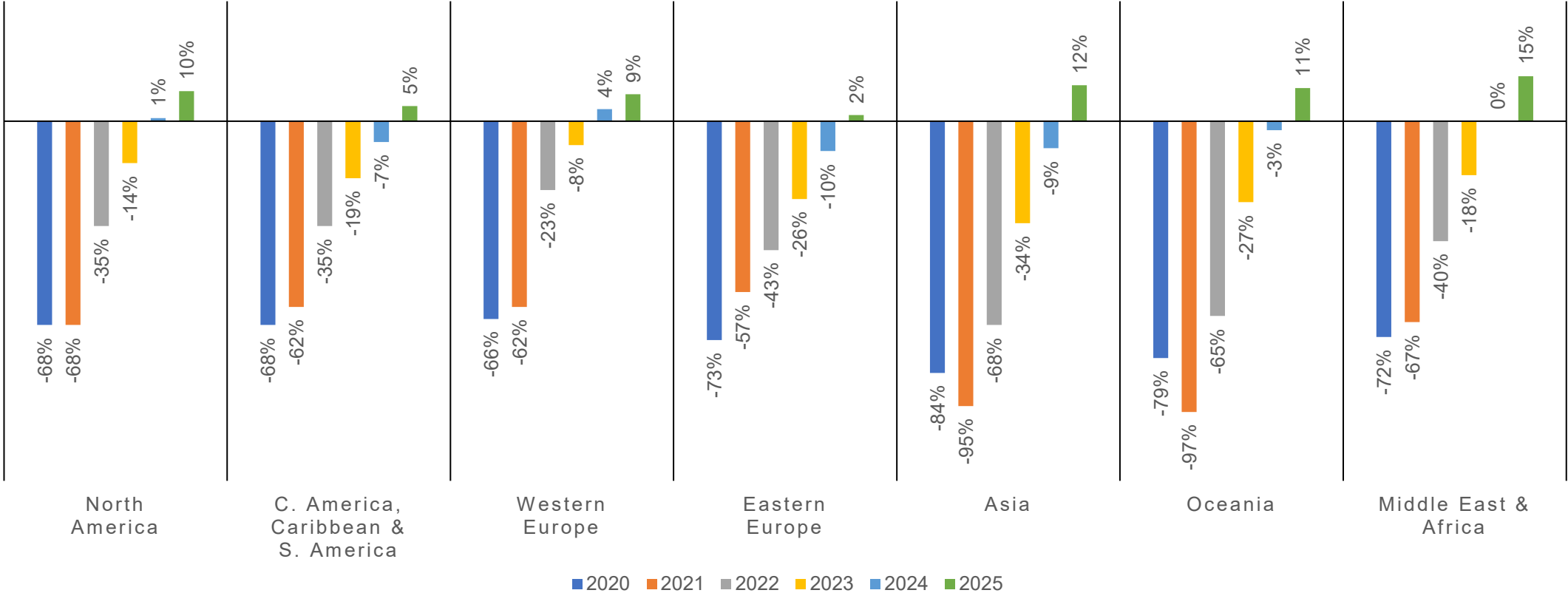


US INBOUND VISITATION

North America is expected to reach 2019 levels by 2024

Western Europe is expected to surpass 2019 by 4% in 2024

Global Inbound Travel By Destination Region
(% YoY change from 2019 levels)

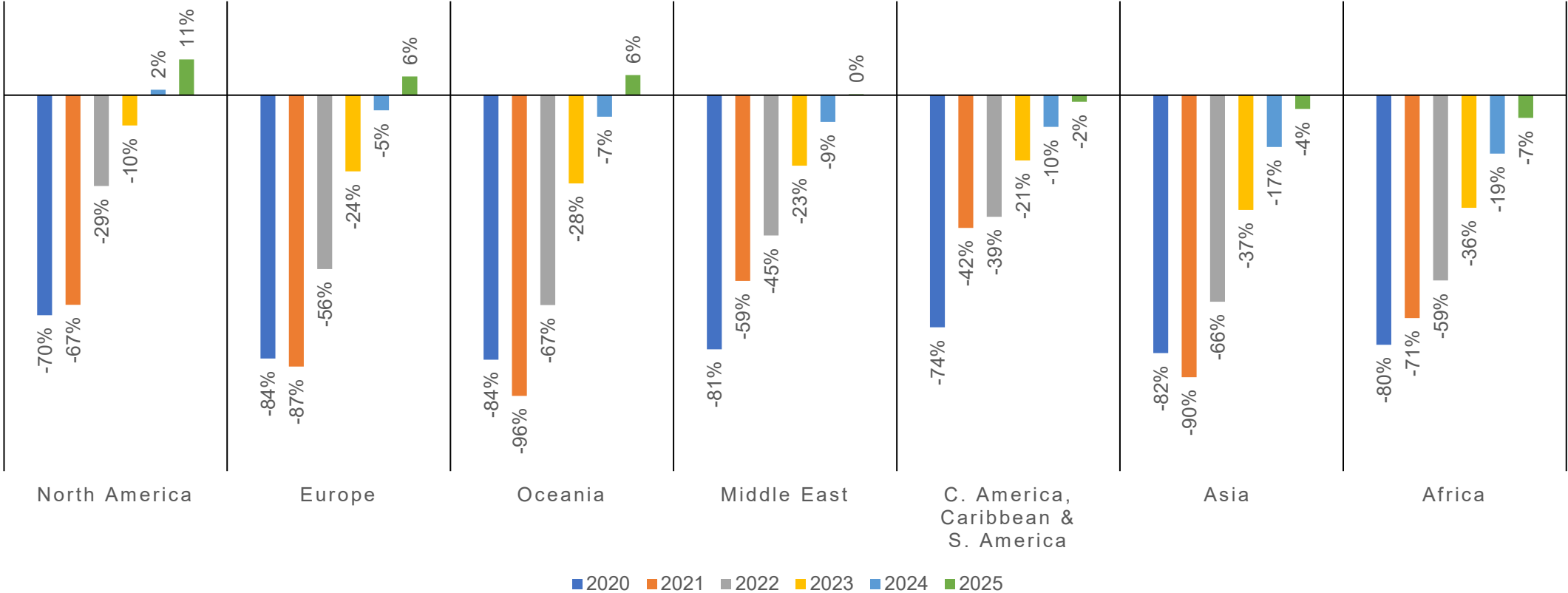


Source: Tourism Economics, as of March 2022

US inbound travel from North America is expected to reach 2019 levels by 2024

European visitation is expected to surpass 2019 by 2025

USA Inbound Travel By Region
(% YoY change from 2019 levels)

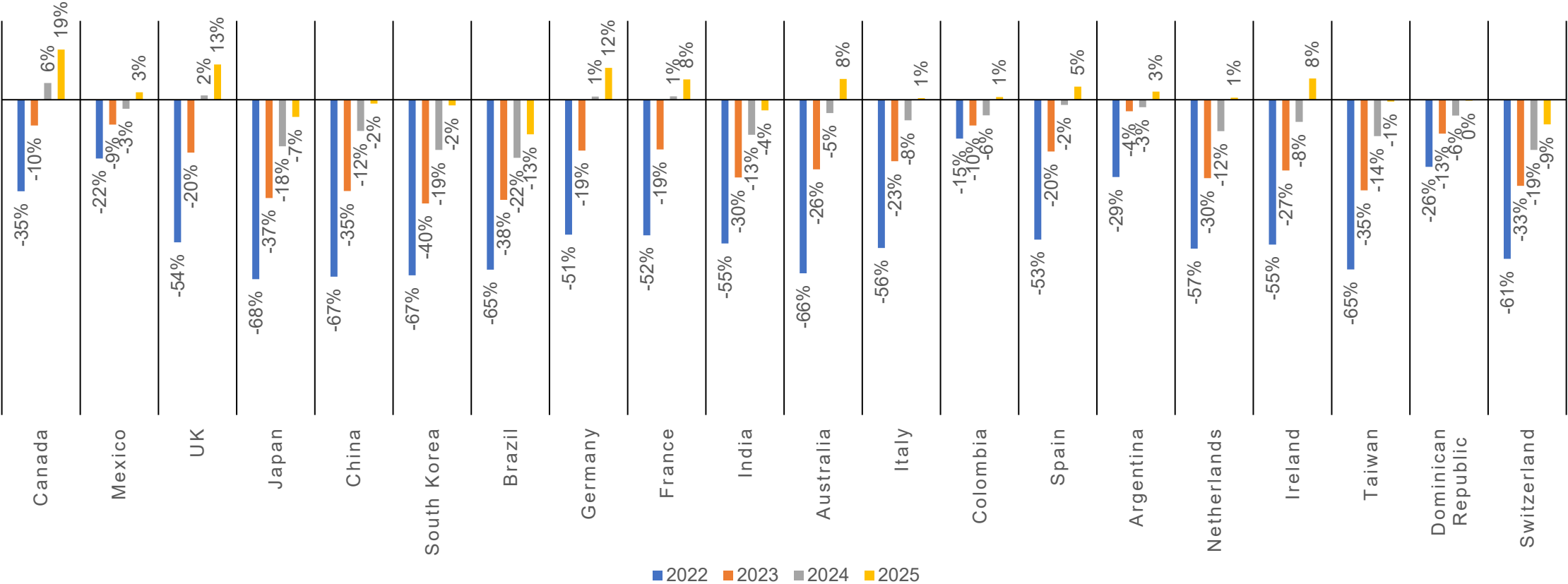


Source: Tourism Economics, as of March 2022

Canadian Travel to the USA is expected to surpass 2019 levels by 2024

Same as visitation more the UK, France and Germany

USA Inbound Travel from Top Visitation Countries in 2019*
(% YoY change from 2019 levels)



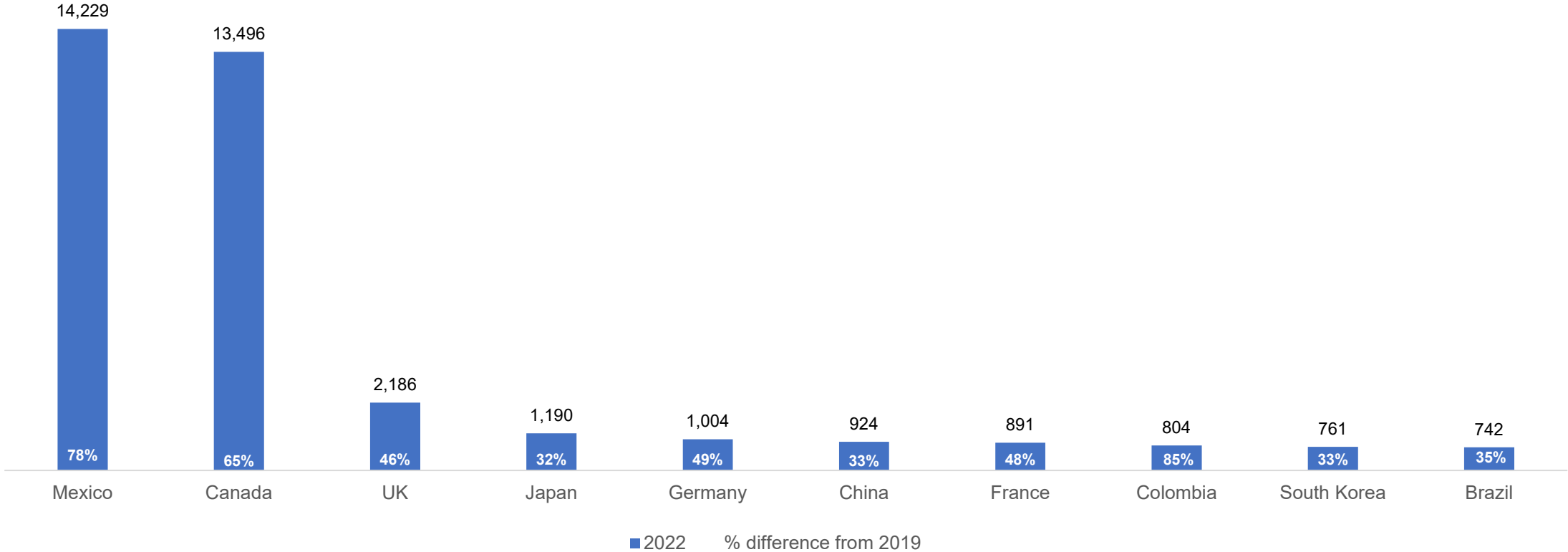
*2019 Top 20 USA visitation countries

Travel to the USA from Mexico nearly 80% of 2019 visitation

European arrivals under 50% of 2019 visitation

2022* USA Inbound Travel from Top 10 countries
(% difference from 2019 levels)

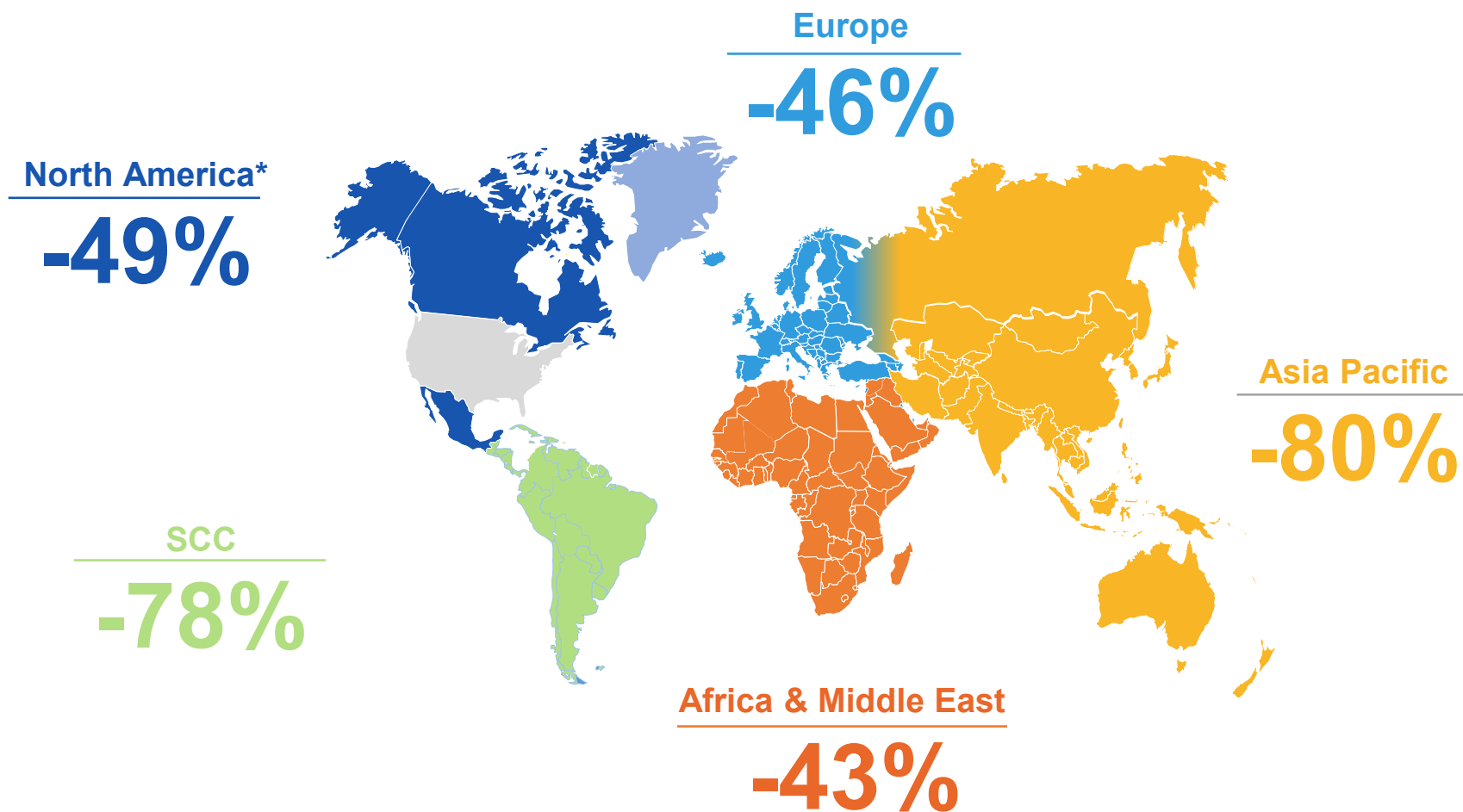
(In thousands)



*2022 forecast

Arrivals from North America and Europe are down less than 50% of 2019

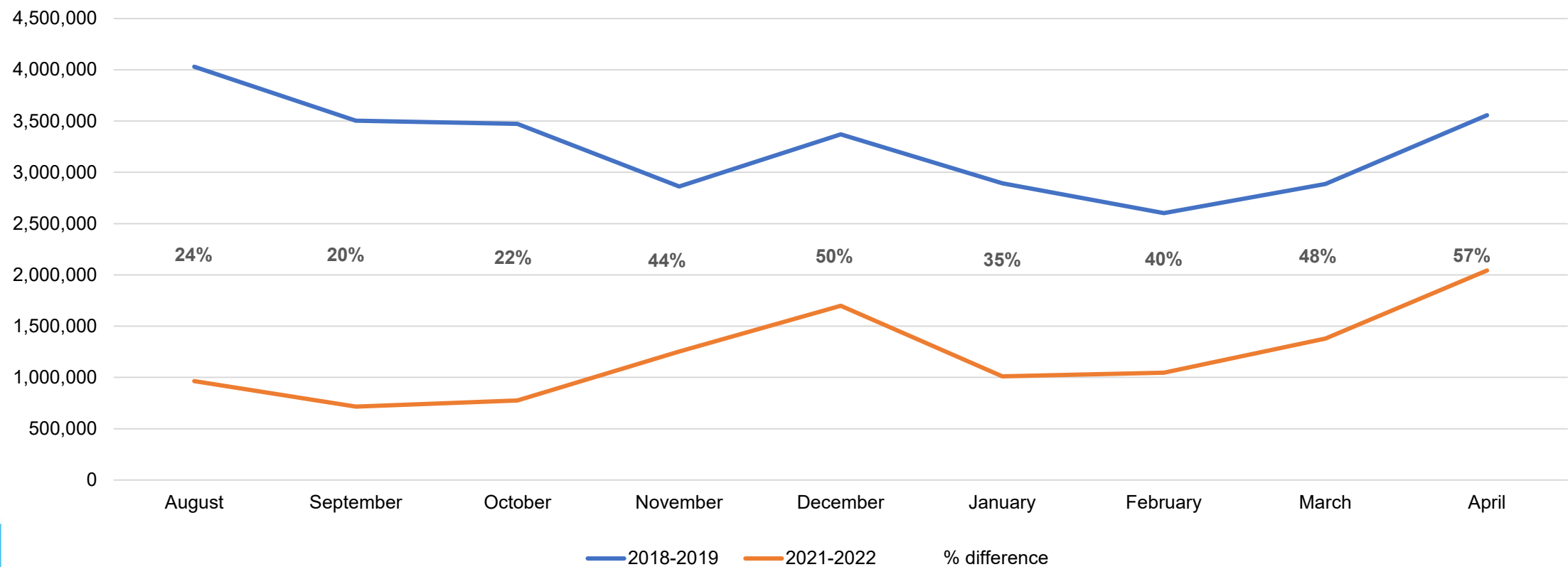
Arrivals to the USA between November 2021 and February 2022, compared to same period in 2018/2019



Overseas travel to USA shows same pre-pandemic patterns

Up-tick in November 2021 after announcement of reopening of USA borders

Overseas Visitation to the USA from August to April (2018-2019 vs 2021-2022)
(and % difference from 2018/2019 period)

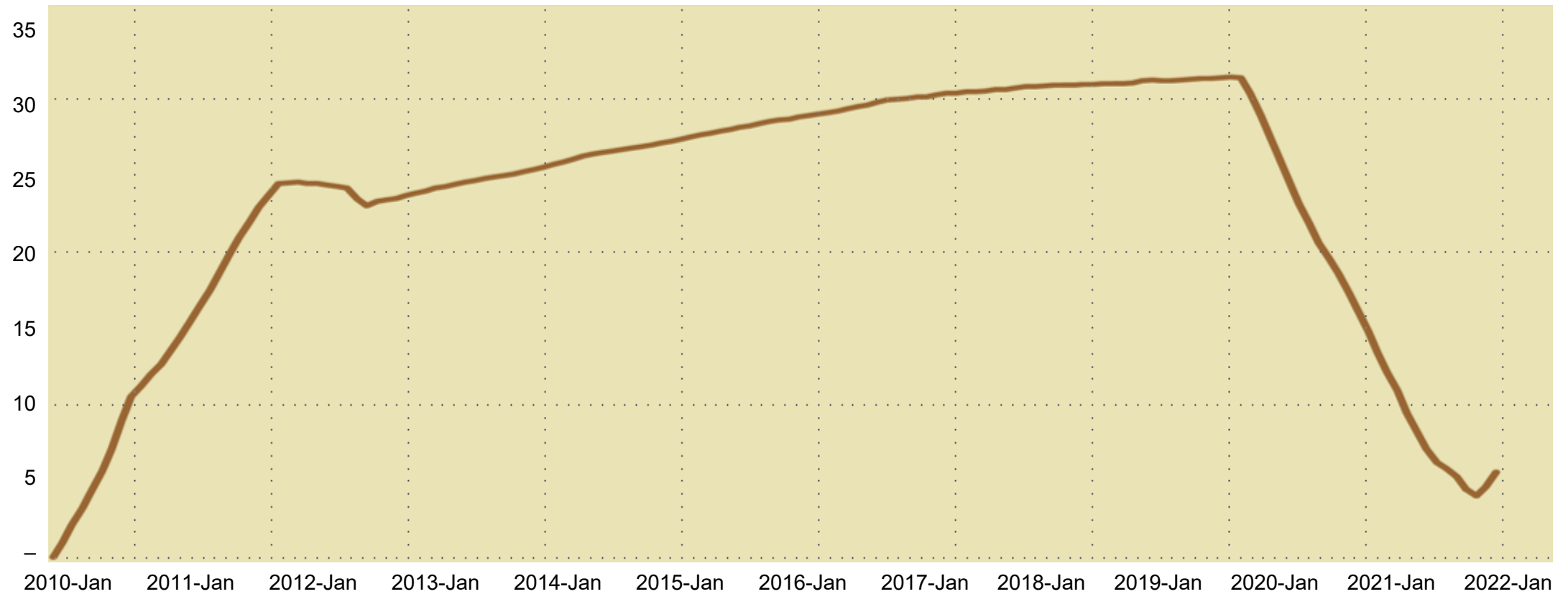


Source: US Department of Commerce, NTTO, as of May 2022

Just over 6 million outstanding valid ESTA approved applications

Best leading indicator of future travel to the USA from VWP countries

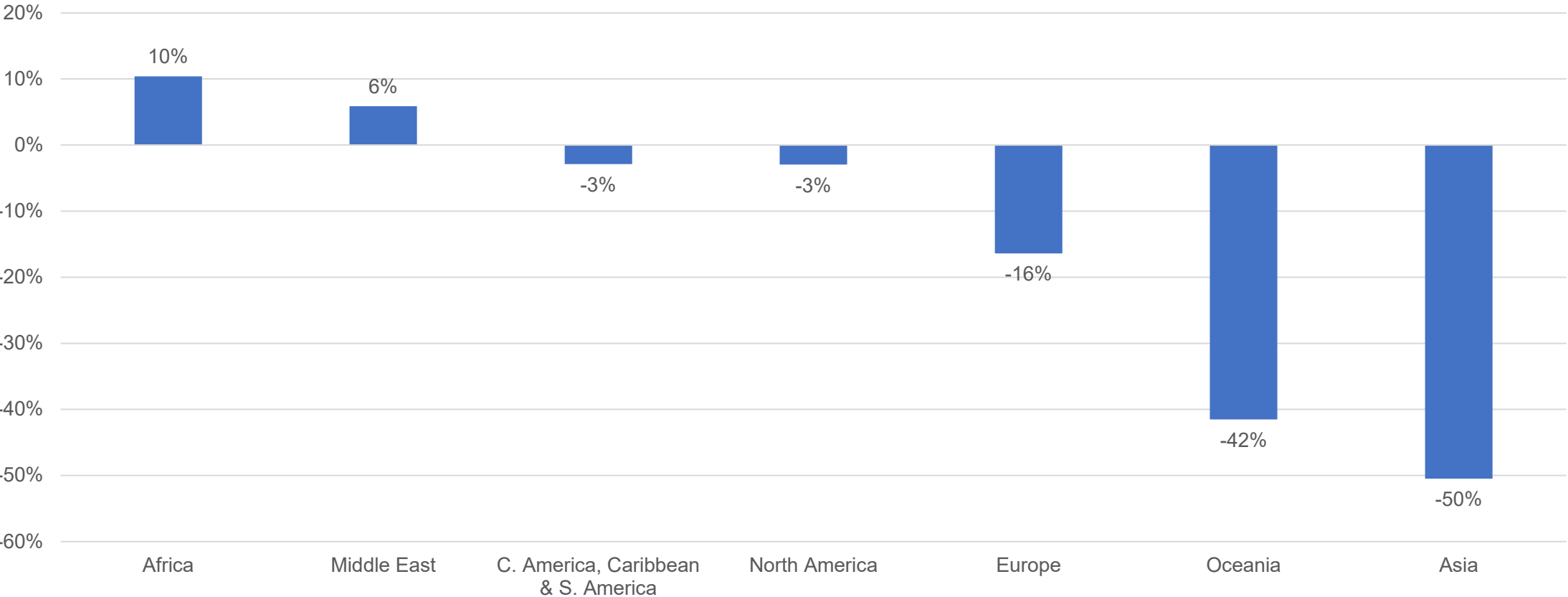
Millions of outstanding valid ESTA applications



Air Capacity to USA from Europe and Oceania is not expected to reach 2019 in 2022

Operating Air Capacity from Africa and the Middle East are expected to surpass 2019 levels

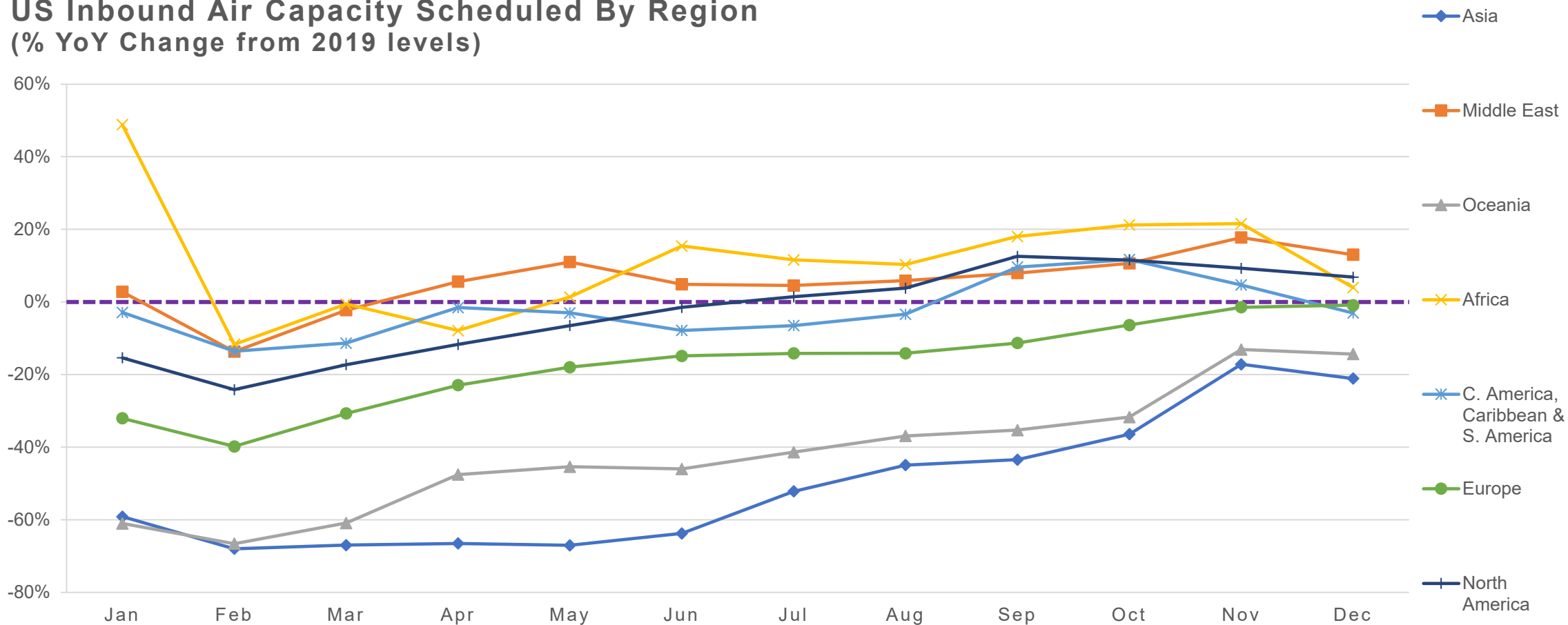
US Inbound Air Capacity Scheduled By Region
(% YoY Change from 2019 levels)



Source: SABRE, as of May 2022

Air Capacity to USA from North America expected to reach 2019 levels by July

US Inbound Air Capacity Scheduled By Region
(% YoY Change from 2019 levels)





KEY GLOBAL INSIGHTS AND TRENDS



INTERNATIONAL PAVILION

Destination

AUSTRALIA (& NEW ZEALAND)

BENELUX

BRAZIL

FRANCE

GERMANY (AUSTRIA & SWITZERLAND)

Destination

INDIA

ITALY

IRELAND

JAPAN

MEXICO

Destination

SOUTH KOREA

SPAIN

THE NORDICS

UNITED KINGDOM



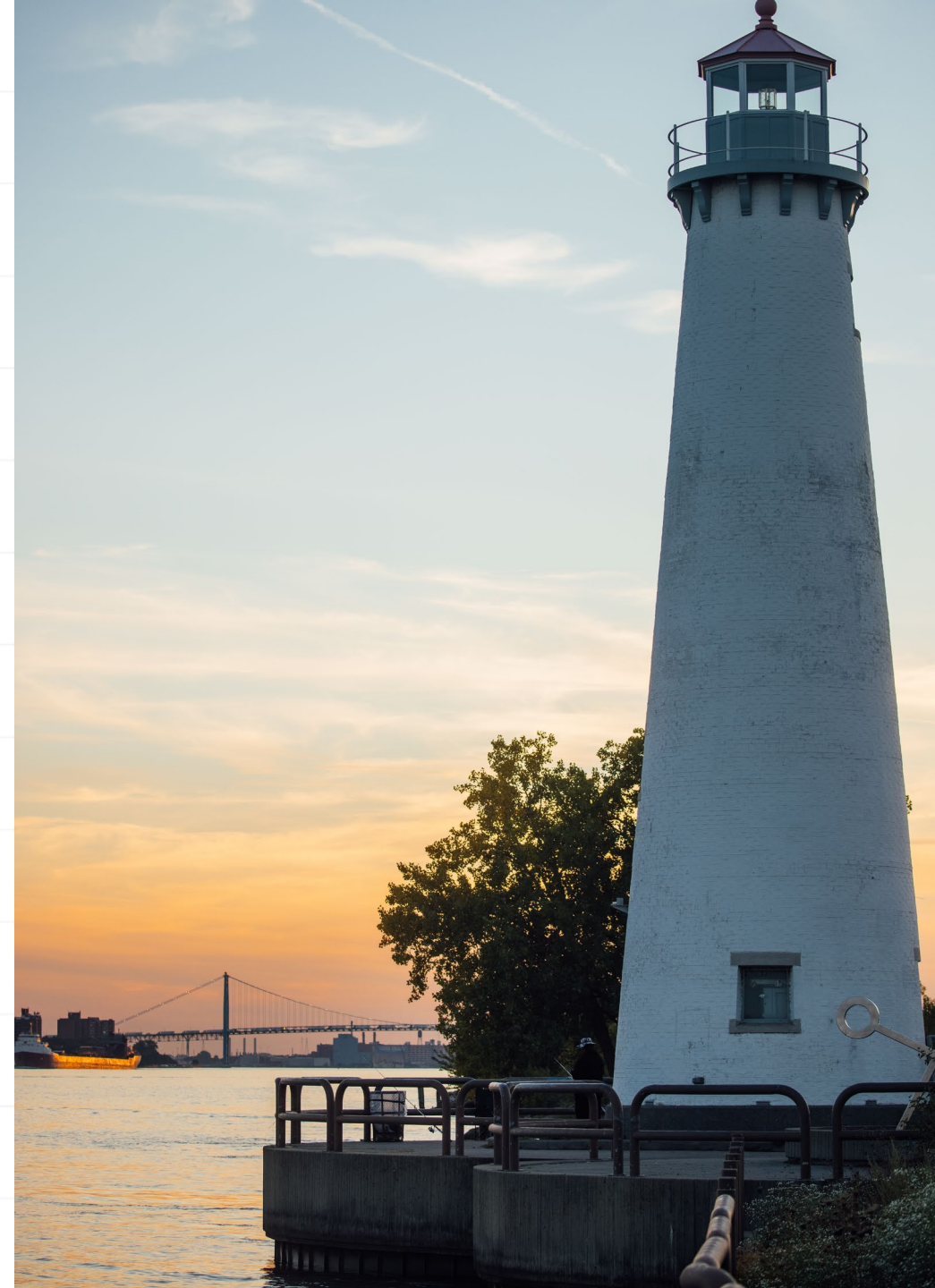


Jackie Ennis

Vice President, Global Markets

Brand USA

MARKET UPDATE:
CANADA



- Increased costs are changing the way Canadians travel.
- Canadians are focusing their travel on well-being, sustainability and reconnection.





Lourdes Berho
Regional Director
Brand USA Mexico

MARKET UPDATE:
MEXICO





- Mexicans are searching for their “G.O.A.T.” (Greatest of all trips) trip.
- Mexican travelers are more price conscious when searching airline tickets but are spending more and staying longer in the destination.
- Mexican travel agents are adapting to the new traveler journey ecosystem.



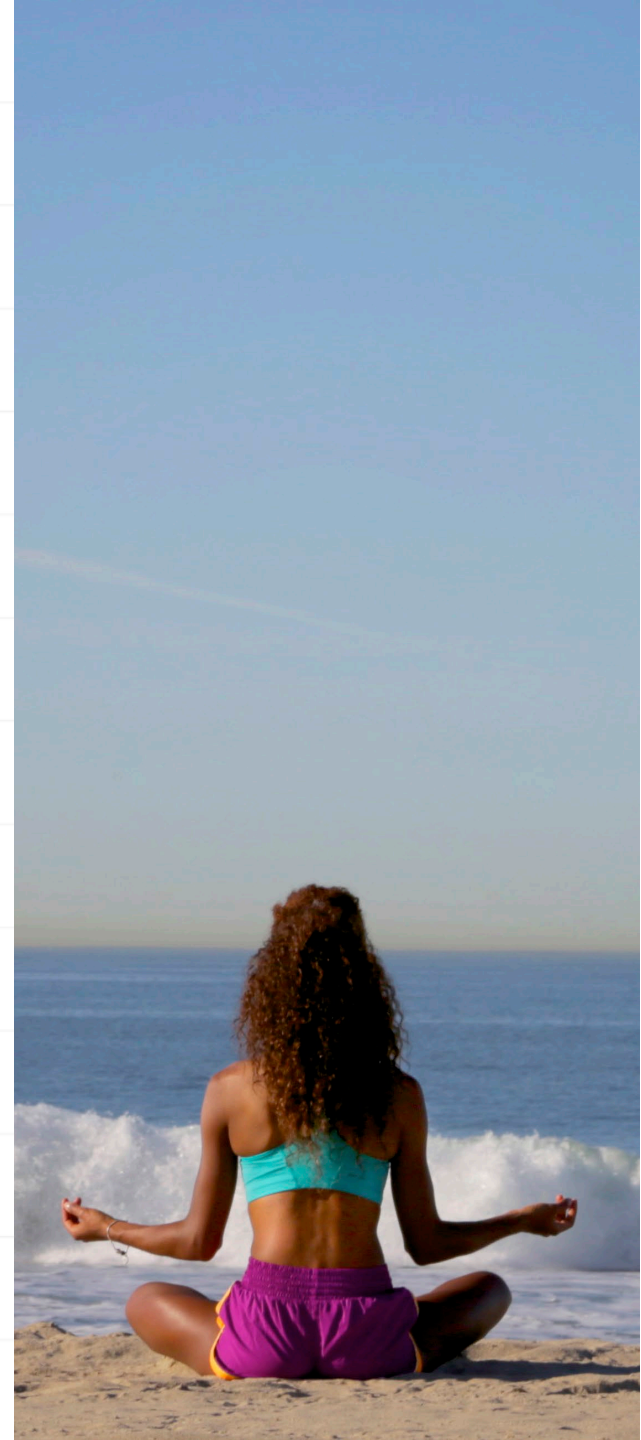
Denis Ribeiro
Managing Director
Brand USA Brazil

MARKET UPDATE:
BRAZIL



BRAZILIANS ARE:

- Looking for multi-purpose travel.
- Looking for wellness and outdoor travel.
- Returning to familiar destinations.





Amanda Hills
Strategic Director
Brand USA UK and Europe

MARKET UPDATE:

UK & IRELAND



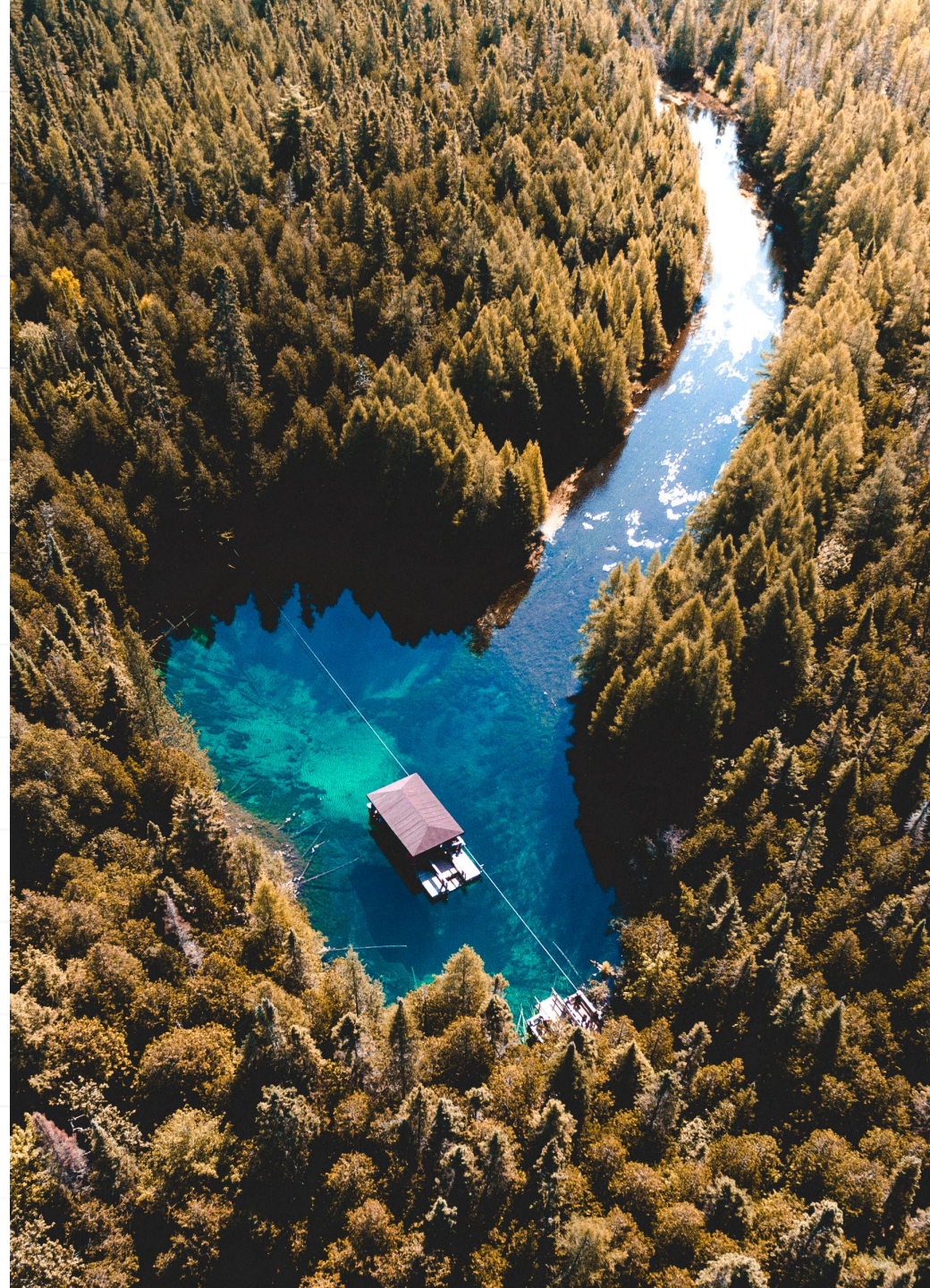


- Increase in the importance of the travel professional.
- Consumers are looking to splurge on their 2022 holidays.



Amanda Davis
Sr. Manager, Global Markets
Brand USA

MARKET UPDATE:
EUROPE





- There is an increase in importance and booking through the trade.
- European pace of recovery is reflected in arrivals figures and increasing airline capacity.
- Sustainability is a more important consideration in travel.



Sheema Vohra
Managing Director
Brand USA India

MARKET UPDATE:
INDIA



- Indian travelers have a high intent to travel and spend more internationally.
- The luxury segment and family travel in India is growing.
- Relaxation, cultural immersion and new experiences are the top motivators for travel.





Emily Kim

Strategic Account Director

Brand USA South Korea

MARKET UPDATE:

SOUTH KOREA



- Korean travel trade industry is going through **digital transformation** to secure sustainability in the post-pandemic year.
- Korean travelers have **shorter lead times** for deciding on a destination and booking their trip. The **booking window** is expected to be shorter as uncertainty continues after the Covid-19 pandemic.
- Spending on travel is outpacing that of pre-pandemic levels and there is a significant **increase in direct bookings.**





Wataru Takaku

Travel Trade Director

Brand USA Japan

MARKET UPDATE:

JAPAN





- Japanese travelers are returning to familiar destinations.
- Japanese travelers are relying on travel agents.
- Sustainable travel is increasing in popularity.



Jo Palmer

Managing Director

Brand USA Australia & New Zealand

MARKET UPDATE:

AUSTRALIA & NEW ZEALAND





- Australians are going big and spending big.
- Ski, snow travel and cruising are in high demand.
- Australians are looking to reconnect with loved ones.



Suzy Shepard
Sr. Manager, Global Markets
Brand USA

MARKET UPDATE:
CHINA



- The Chinese travel trade industry is becoming more digital and content driven.
- Chinese students are returning to the USA.
- Strict re-entry protocols has slowed leisure travel.



International Pavilion – Brand USA Global Marketplace





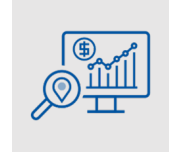
PARTNER RESOURCES

Opportunities for the Entire Industry

PARTNERSHIP PRIORITIES FOR FY2023



**REBUILDING
HUMAN RESOURCES
& INVESTING
IN PARTNER SUPPORT**



**PARTNER RESEARCH
& REPORTING TOOLS**



**PAID MEDIA
INTEGRATION AND
AUDIENCE
DEVELOPMENT**



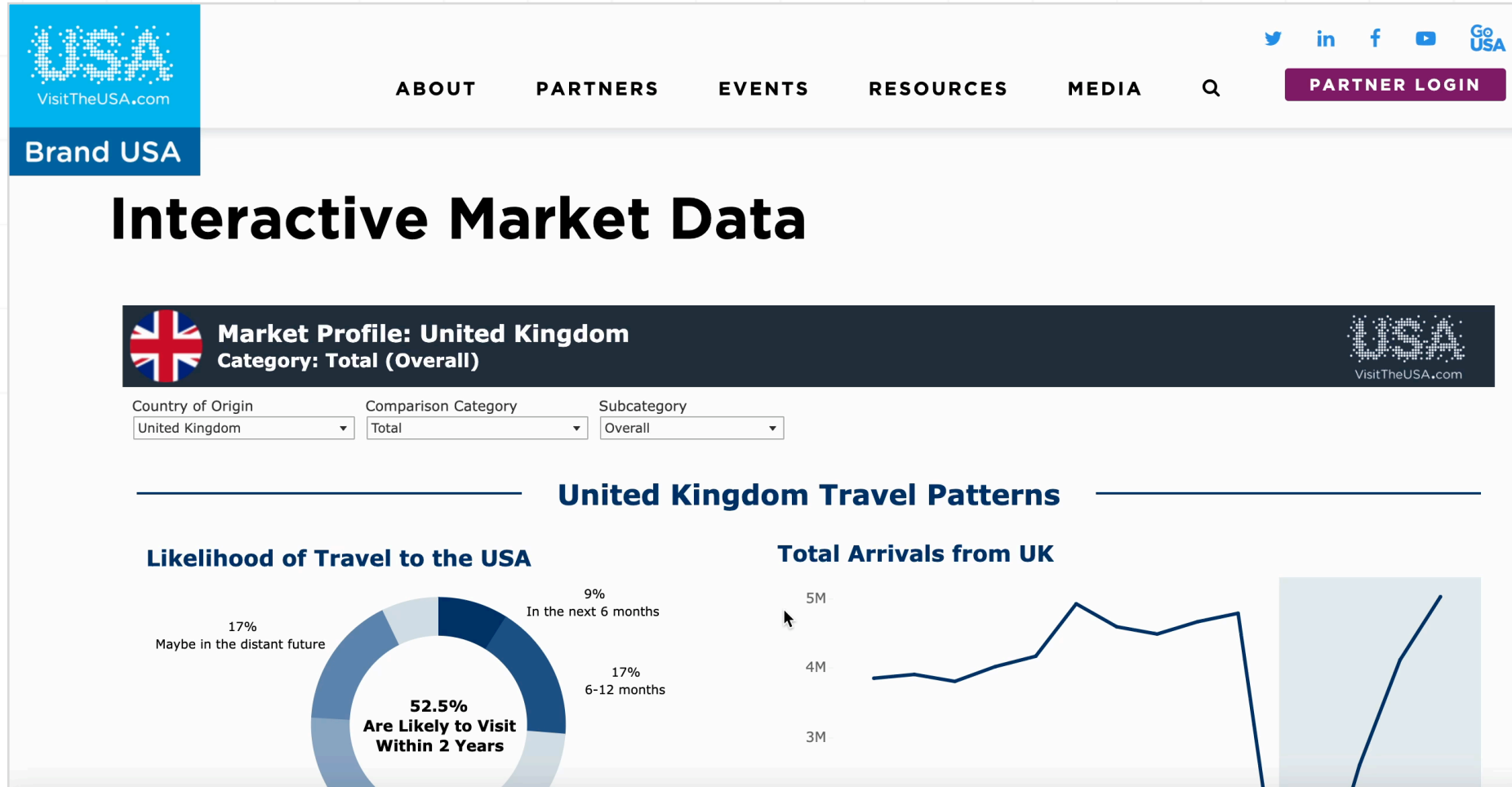
**CO-OPERATIVE
MARKETING SUPPORT**



TRAVEL TRADE INNOVATION

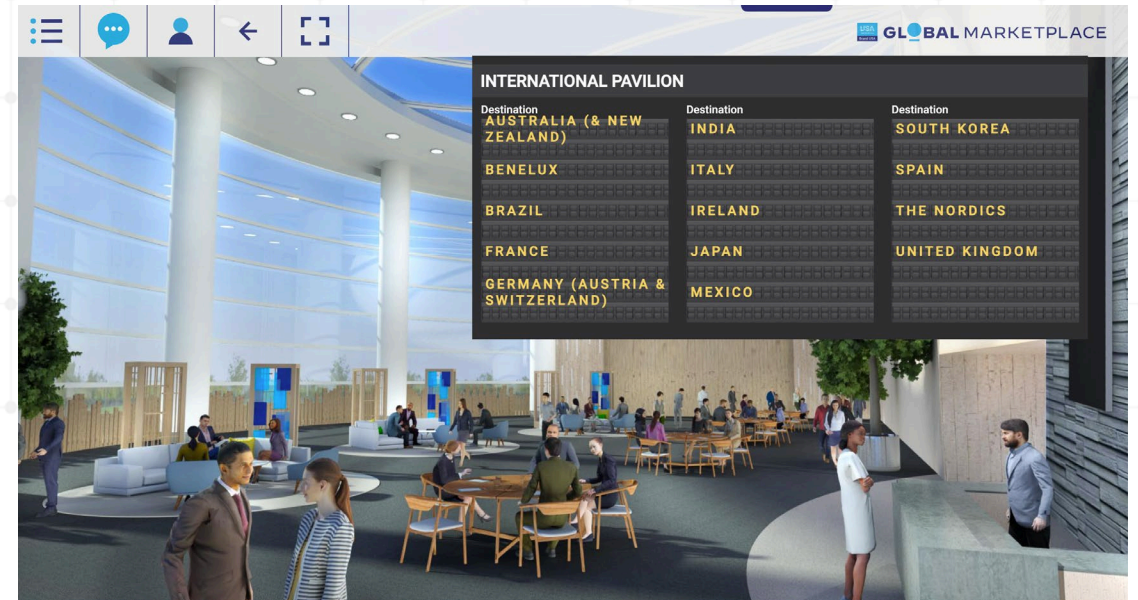
INTERACTIVE MARKET DATA DASHBOARD

Real-Time Access to the Latest Research by Country



INTERNATIONAL PAVILION

Centralized, Interactive Hub for Resources by Market



The International Pavilion on Brand USA Global Marketplace is live with market intelligence information for the UK, Ireland, Germany (Austria & Switzerland), France, Australia (New Zealand), India, Mexico, Brazil, Japan, South Korea, Italy, Spain, Benelux, and the Nordics. This new resource will provide insights into the travel and media landscapes in key target markets.



New Team: Partner Representation & Experience

LEADERSHIP



CASSADY
BAILEY
Oversees the
Partner Team



SKYLAR
CLARK
Partner Strategy



CHRIS
ELLIS
Industry
Engagement

DAY-TO-DAY



CHELSEA
SULLIVAN
KAISER



DANI
CAMPANA



MAYA
HUA

SUPPORT



RIANNA
AIRITAM



TRE
WILSON



Q & A



THANK YOU